

LEASE-DESK

Main Access User Manual Version 1.0



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

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1. Introduction to Lease-Desk:

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

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

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

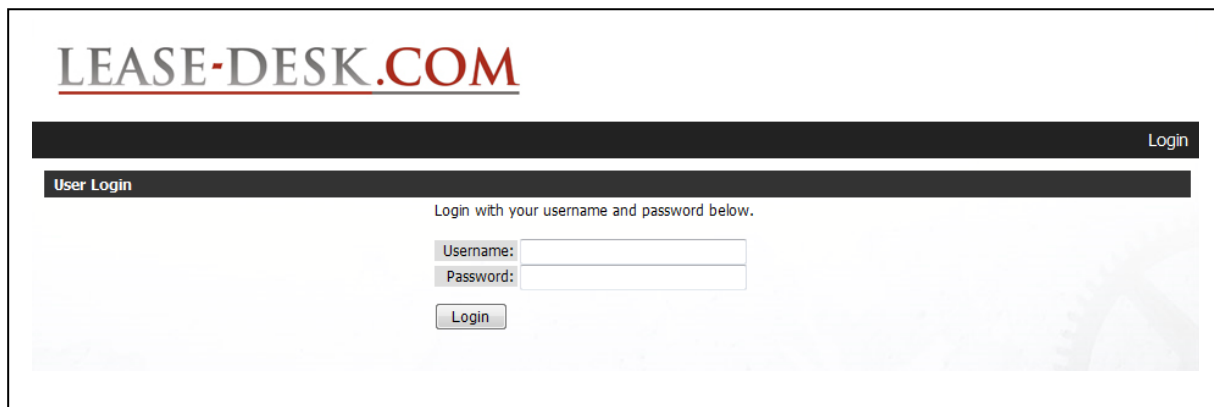
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will generally have 'reader' access rights to the groups that you have been set up in by the administrators. This means that you can view all of the live and pending agreement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

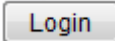
2. Logging into Lease-Desk:

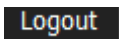
1. Go to www.Lease-Desk.com and click on the Client Login box as per below.

A screenshot of a login box with a dark red background. At the top is the text 'LEASE-DESK.COM' in a serif font. Below it are two white input fields, the first labeled 'USERNAME' and the second labeled 'PASSWORD'. At the bottom, there is a dark grey button with the text 'CLIENT LOGIN' and 'CLICK HERE TO LOG INTO YOUR LEASE-DESK PROFILE' below it.

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

A screenshot of the 'User Login' page. At the top is the 'LEASE-DESK.COM' logo. Below it is a dark grey navigation bar with a 'Login' link on the right. Underneath is a 'User Login' header. The main content area says 'Login with your username and password below.' and contains a form with 'Username:' and 'Password:' labels, input fields, and a 'Login' button. The background features a faint image of interlocking gears.

3. Enter your details and click on 

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

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

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

The screenshot displays the Lease-Desk Home Screen. At the top, there is a navigation bar with links: Home, Agreements, Search, Dashboard, Feedback, Alerts (15), and Logout. Below this is a 'back' button and a 'Company Details' header. A welcome message states: 'Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc.'


The main content area is divided into several sections:

- Company Information:** A form with fields for Name (Bright Tel Ltd), Company Type (Vendor), SIC Code (6420) TELECOMMUNICATIONS, Turnover, Employees, Credit Rating, Credit Limit, and Analysis Date.
- Addresses:** A table with columns ID, Name, Address, Post Code, and Telephone. It includes buttons for Add Address, Edit Address, Set As Main, and Delete Address. The table shows one entry: ID 134, Name Main Office, Address Unit 42 Sketherton Buz, Post Code NN11 2EW, Telephone 01604 596569.
- Files:** A table with columns ID, Name, and Type. It includes buttons for Add File, View File, and Delete File. The table shows one entry: ID 5, Name Demo Company Import.csv, Type Other.
- Providers:** A table with columns ID, Company ID, and Name. It includes buttons for Associate Provider and Delete Association. The table shows two entries: ID 33, Company ID 100, Name Siemens Financial Services Ltd; and ID 34, Company ID 101, Name Henry Howard Finance PLC.
- Users:** A table with columns ID, User Name, Full Name, Job Title, and Type. It shows two entries: ID 377, User Name jeremy.carse@lease-desk.com, Full Name Jeremy Carse, Job Title Account Manager SME South, Type Normal; and ID 375, User Name mike.chaplin@lease-desk.com, Full Name Mike Chaplin, Job Title Account Manager Enterprise Team, Type Normal.
- Products:** A table with columns Id, Part Number, Name, and Manufacturer. It includes buttons for Add Product, Edit Product, and Delete Product. The table shows two entries: Id 2386, Part Number TM018, Name Imaginary Part 2, Manufacturer Telco Manufacturer Ltd; and Id 2387, Part Number TM019, Name Gigabit Ethernet Stand, Manufacturer Telco Manufacturer Ltd.





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

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

3.1.1. Adding an Address:

1. Click on  from the main Addresses table as indicated below.

Addresses

	Add Address		Edit Address		Set As Main		Delete Address
ID	Name	Address	Post Code	Telephone			
80	Lake View Drive	Sherwood Park, Nottir	NG15 0DT	01302 245310			

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

LEASE-DESK.COM

Logged in as: Ted Mountbatten

Home Agreements Search Dashboard Feedback Alerts (0) Log

back

Add Address To Company

Fill in the details below and click on Add a New Address, to add a new address to your company details, or Save Address to edit your company details.

Address Name

Address Line 1

Address Line 2

Address Line 3


Postcode

Telephone





Add A New Address

3. Fill in the full address details and click on 

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





 Created a New Address

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

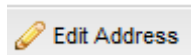
Addresses				
 Add Address  Edit Address  Set As Main  Delete Address				
ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

3.1.2. Editing an Address:

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

Addresses				
 Add Address  Edit Address  Set As Main  Delete Address				
ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

2. Click on



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

LEASE-DESK.COM

Logged in as: Ted Mountbatten

Home Agreements Search Dashboard Feedback Alerts (0) Logout

back

Edit Address

Fill in the details below and click on Add a New Address, to add a new address to your company details, or Save Address to edit your company details.


Address Name	Unit 1 Business Park
Address Line 1	Unit 1 Business Park
Address Line 2	London
Address Line 3	
Postcode	NW1 8DD
Telephone	0207 200 0000

Save Address

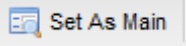
4. Amend the required Address details and click on

Save Address

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

 Updated Address

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;

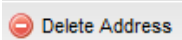
 Updated Address

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

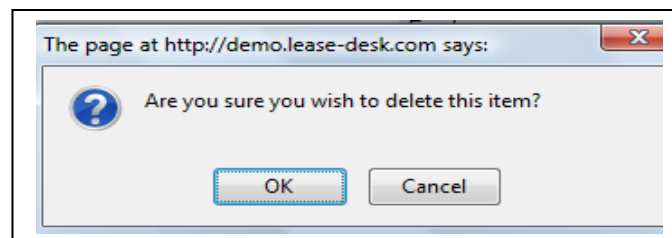
as indicated below;

Addresses				
<div>+ Add Address ✎ Edit Address 🏠 Set As Main − Delete Address</div>				
ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

3.1.4. Deleting an Address:

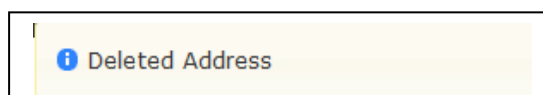
1. To delete an address from your Company Details, highlight the required address (as indicated previously) and click 

2. You will then receive the following message;



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

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

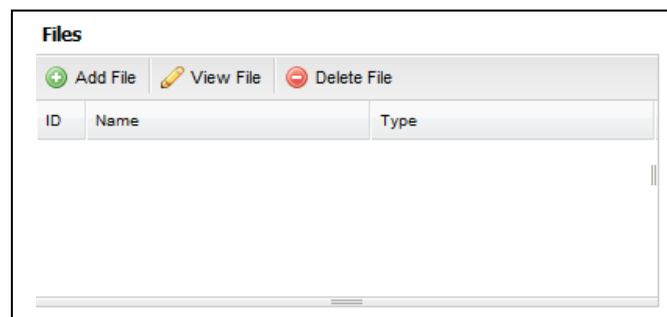


3.2. Adding, Editing, Viewing, and Deleting Files:

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

3.2.1. Adding a File:

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



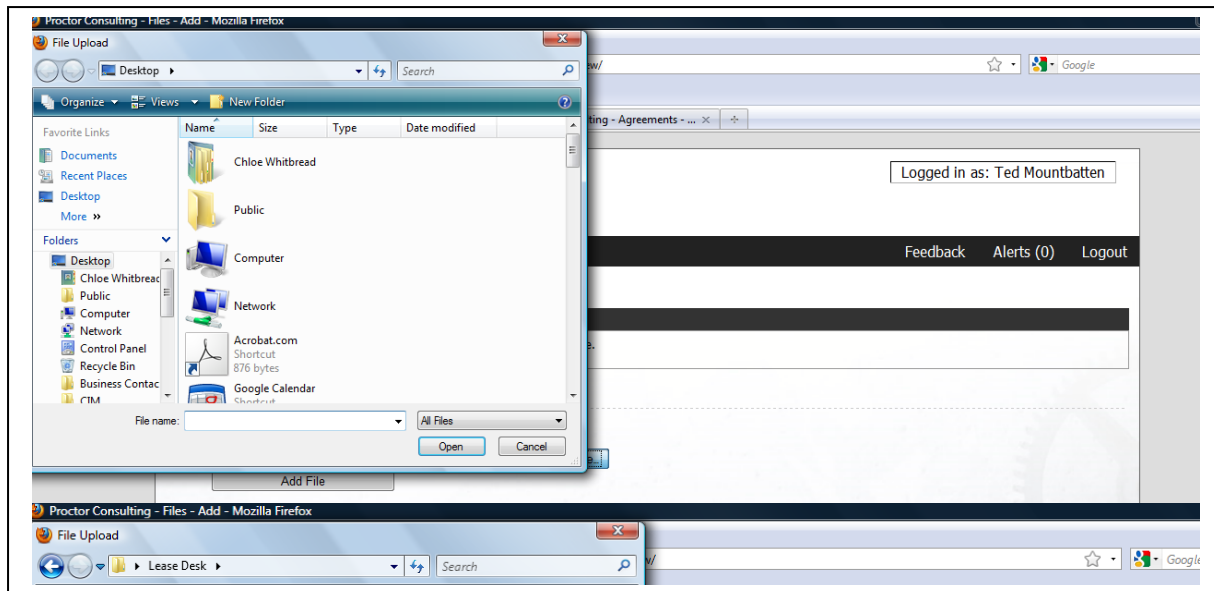
2. To add a file against your Company Details, click



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

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

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



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

Add File

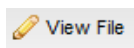
7. You will then be taken back to the 'Edit Company Details' screen and receive the following confirmation message;

Uploaded file

3.2.2. Viewing a File:

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

2. Click

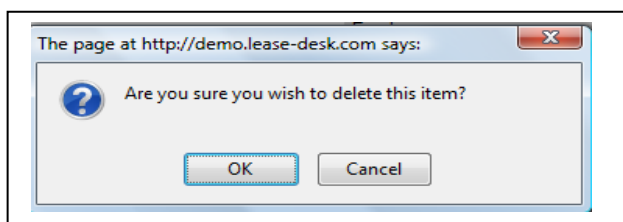


3.2.3. Deleting a File:

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

2. Click 

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



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

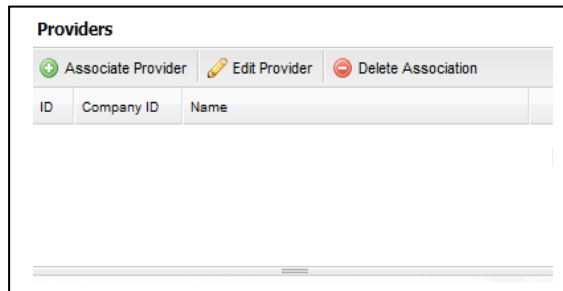
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;



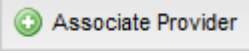
3.3. Providers: Associating, Editing, and Deleting Association:

3.3.1. Associating a Provider (Vendor Only):

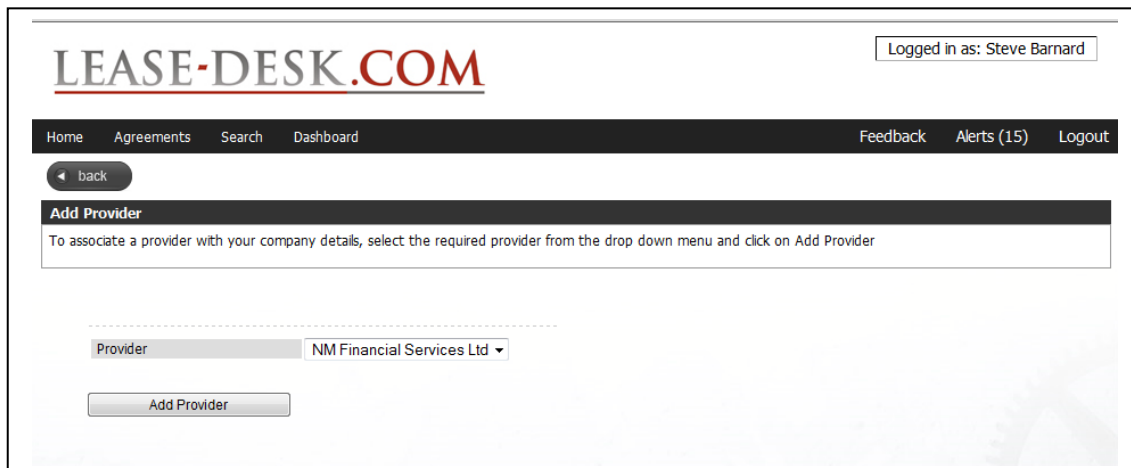
1. To associate a Provider with your Company, go to the Providers table, within the Edit Company Details screen;



The screenshot shows a 'Providers' management interface. At the top, there are three buttons: 'Associate Provider' (with a green plus icon), 'Edit Provider' (with a yellow pencil icon), and 'Delete Association' (with a red minus icon). Below these buttons is a table with three columns: 'ID', 'Company ID', and 'Name'. The table is currently empty.

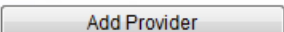
2. Click 

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



The screenshot shows the 'Add Provider' screen. At the top, the 'LEASE-DESK.COM' logo is on the left, and 'Logged in as: Steve Barnard' is on the right. Below the logo is a navigation bar with links: Home, Agreements, Search, Dashboard, Feedback, Alerts (15), and Logout. A 'back' button is located below the navigation bar. The main heading is 'Add Provider'. Below the heading is a text box that says: 'To associate a provider with your company details, select the required provider from the drop down menu and click on Add Provider'. Below this text box is a 'Provider' label and a dropdown menu showing 'NM Financial Services Ltd'. At the bottom is an 'Add Provider' button.


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



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

3.3.2. Editing a Provider (Vendor Only):

1. To edit an associated Providers details, go to the Providers table, within the Edit Company Details screen as previously shown.

2. Click  Edit Provider

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

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

3.3.2. Deleting a Provider Association (Vendor Only):

1. To delete an associated Providers details, go to the Providers table, within the Edit Company Details screen as previously shown and highlight the required Provider.

2. Click  Delete Association

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

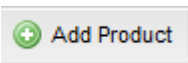
4. You will then be taken back to the Edit Company Details screen.

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

3.4.1 Adding a Product:

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



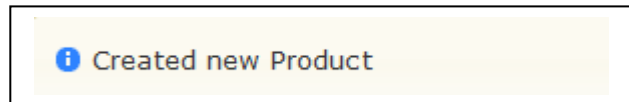
2. Click 

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

A screenshot of the 'Add A New Product' screen. At the top, the 'LEASE-DESK.COM' logo is on the left, and 'Logged in as: Steve Barnard' is on the right. Below the logo is a navigation bar with links: 'Home', 'Agreements', 'Search', 'Dashboard', 'Feedback', 'Alerts (15)', and 'Logout'. A 'back' button is on the left. The main heading is 'Add A New Product'. Below it is a text box with the instruction: 'Fill in the details below and click on Add Product, to add a new product.' There are three input fields: 'Product Name', 'Part Number', and 'Manufacturer'. Below these fields is an 'Add Product' button.

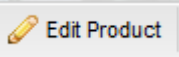
4. Fill in the details and click 

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



3.4.2 Editing a Product:

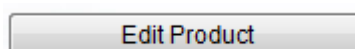
1. To edit an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

2. Click 

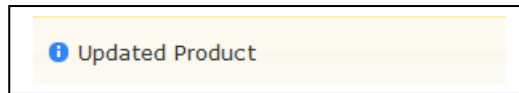
3. You will then be presented with the 'Edit Product Details' screen as per below;

A screenshot of the 'Edit Product Details' screen. At the top is the 'LEASE-DESK.COM' logo and a 'Logged in as: Steve Barnard' box. Below is a navigation bar with 'Home', 'Agreements', 'Search', 'Dashboard', 'Feedback', 'Alerts (15)', and 'Logout'. A 'back' button is on the left. The main heading is 'Edit Product Details' with a sub-instruction: 'Amend the required Product details below and click on Edit Product, in order to edit the Users information against your company details.' Below this is a form with three rows: 'Product Name' with value 'Imaginary Part 2', 'Part Number' with value 'TM018', and 'Manufacturer' with value 'Telco Manufacturer Ltd'. An 'Edit Product' button is at the bottom left.

4. Amend the required detail and then click



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



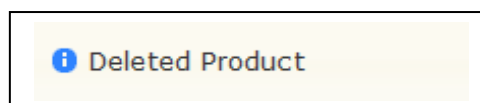
3.4.3 Deleting a Product:

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

2. Click 

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

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



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

4.1. Adding a Prospect Agreement: - pending PP

1. Select **Agreements** from the top main menu.
2. You will be presented with the main agreement list screen, which lists all the live and prospect agreements within the software, as per below;

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

LEASE-DESK.COM

Logged in as: Chloe Whitbread

Home Users Agreements Companies Financial Products Imports Search Dashboard Feedback Alerts (0) Logout

back

Agreement List

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

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

40 Page 1 of 1 Displaying 1 to 37 of 37 items

3. Click **Add Agreement**

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

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

LEASE-DESK.COM

Logged in as: Chloe Whitbread

Home Users Agreements Companies Financial Products Imports Search Dashboard Feedback Alerts (0) Logout

back

Add a new Agreement

Customer

Customer Please Select

User Please Select

Provider

Provider None

Continue

Create A New Customer

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

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

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

6. Then click

Continue

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

Provider

Provider NM Financial Services Ltd

User Please Select

Contract Please Select

Continue

Create A New Customer

8. Complete the following drop down menus;

- User
- Contract

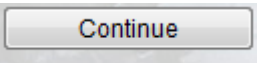
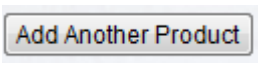
9. Click

Continue

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

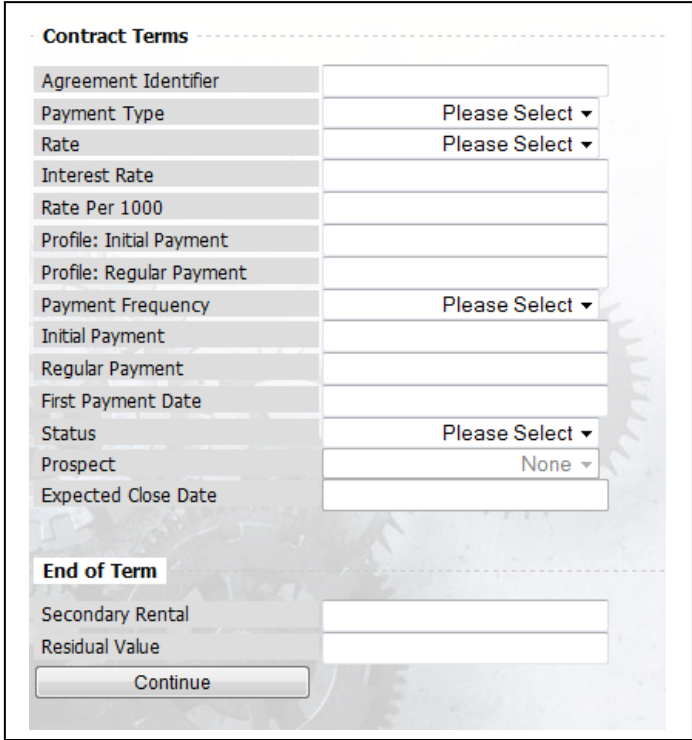
Note: the below image needs to be changed once PP have completed access rights for main users to add agreements

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

12. Click  if complete or  to add an additional product (repeating previous step).

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

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



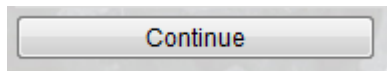
14. Fill in the following details;

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

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

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

15. Click



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

(note, need to add this image)

4.2. Viewing an Agreement:

1. From the top toolbar menu, select

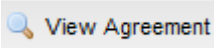
Agreements

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

A screenshot of the Lease-Desk web application showing the 'Agreement List' screen. The interface includes a top navigation bar with links for Home, Agreements, Search, and Dashboard, along with Feedback, Alerts (0), and Logout. Below the navigation bar is a 'back' button. The main heading is 'Agreement List', followed by a descriptive text: '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.' There are two buttons: 'Edit Agreement' and 'View Agreement'. The table below has columns for Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. The table contains 12 rows of data, with the third row (Id 24) highlighted in blue. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Displaying 1 to 12 of 12 items'.

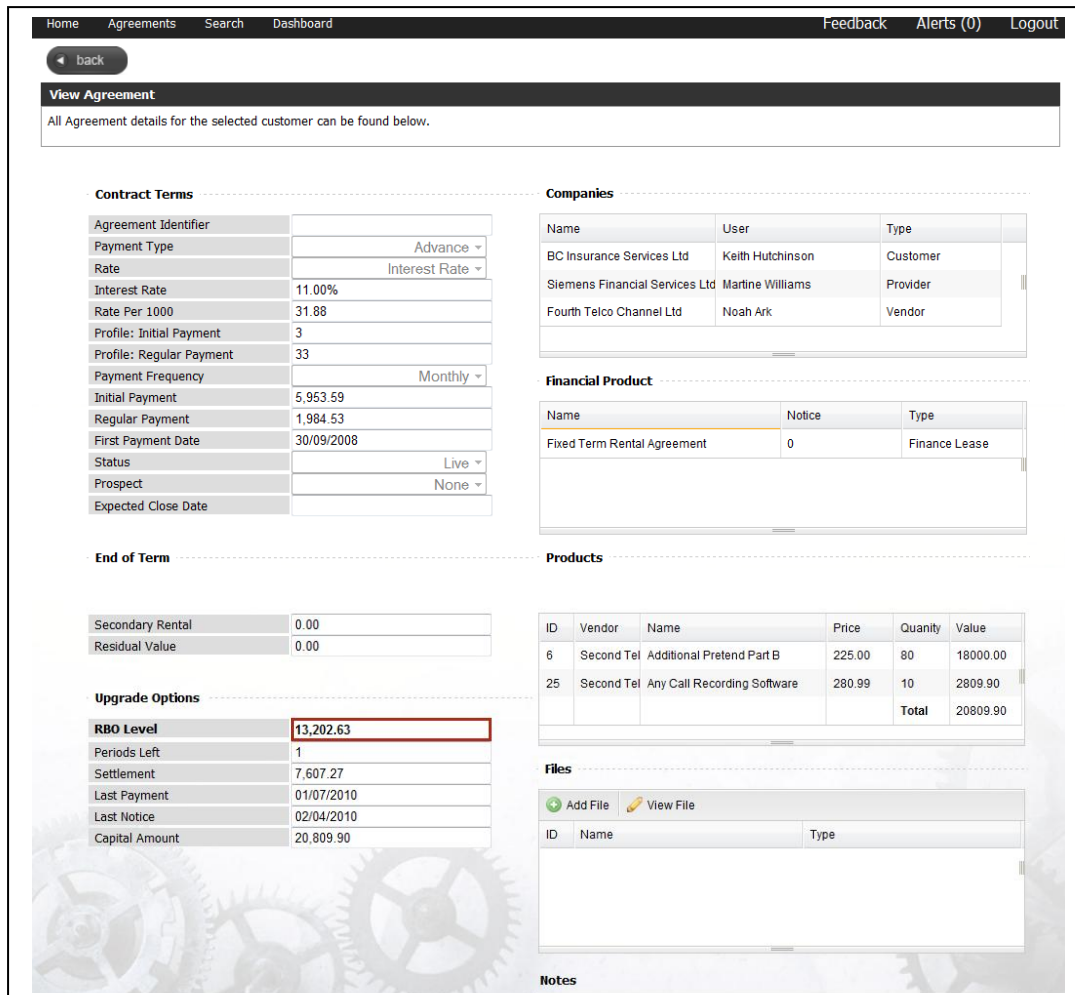
Id	Identifier	Company	Status	Primary User	RBO Level	End Date
33	IMPORT101	ABC University	Dead	John Ross	16044.58	01/11/2012
24	111209DD	DD Retail Ltd	Live	Chris Wilson	353543.33	05/01/2009
53	1401100957	DD Retail Ltd	End of Term	Chris Wilson	4682.67	20/01/2012
45	TEST1019	GG IT Ltd	Live	Louise Roberts	110878.93	16/02/2011
27	8904567TY	Hello Retail Ltd	Live	Jo Madden	124146.84	02/01/2011
56	1401101000	Hello Retail Ltd	Prospect	Jo Madden	0.00	25/12/2014
47	TEST1021	HelpSell Training Services	Prospect	Coral Hannah	0.00	12/12/2010

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

4. Click 

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

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



View Agreement
All Agreement details for the selected customer can be found below.

Contract Terms

Agreement Identifier	
Payment Type	Advance
Rate	Interest Rate
Interest Rate	11.00%
Rate Per 1000	31.88
Profile: Initial Payment	3
Profile: Regular Payment	33
Payment Frequency	Monthly
Initial Payment	5,953.59
Regular Payment	1,984.53
First Payment Date	30/09/2008
Status	Live
Prospect	None
Expected Close Date	

Companies

Name	User	Type
BC Insurance Services Ltd	Keith Hutchinson	Customer
Siemens Financial Services Ltd	Martine Williams	Provider
Fourth Telco Channel Ltd	Noah Ark	Vendor

Financial Product

Name	Notice	Type
Fixed Term Rental Agreement	0	Finance Lease

End of Term

Secondary Rental	0.00
Residual Value	0.00



Upgrade Options

RBO Level	13,202.63
Periods Left	1
Settlement	7,607.27
Last Payment	01/07/2010
Last Notice	02/04/2010
Capital Amount	20,809.90

Products

ID	Vendor	Name	Price	Quantity	Value
6	Second Tel	Additional Pretend Part B	225.00	80	18000.00
25	Second Tel	Any Call Recording Software	280.99	10	2809.90
Total					20809.90

Files

 Add File  View File

ID	Name	Type
----	------	------

Notes

Note: Upgrade Options:

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

4.3. Editing an Agreement:

1. From the top toolbar menu, select

Agreements

2. Highlight the required agreement and click

Edit Agreement

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

Edit Agreement Details

Amend the required fields below and click on Save Changes to save edited information.

Customer

Customer	A A Manufacturing Ltd
User	Catherine Parker

Provider

Provider	Borrow Financial Services
User	Chloe Maxwell
Contract	Hire Purchase Agreement

Contract Terms

Agreement Identifier	TEST1013
Payment Type	Arrears
Rate	Interest Rate
Interest Rate	11.40%
Rate Per 1000	99.56
Profile: Initial Payment	1
Profile: Regular Payment	11
Payment Frequency	Quarterly
Initial Payment	11,220.61
Regular Payment	11,220.61
First Payment Date	
Status	Prospect

Vendors

ID	Name	Primary Contact	Telephone
136	Data Communications Ltd	Warren Fox	01629 450 321

Products

ID	Vendor	Name	Price	Quantity	Value
63	Data Comm	Voicemail System Card	9.99	850	8,491.50
64	Data Comm	Power Supply For Handsets	19.99	500	9,995.00
65	Data Comm	Power Supply For Handsets UK	19.99	500	9,995.00

Files

ID	Name	Type
----	------	------

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

5. Once details have been amended, click

Save Changes

4.3.1 Adding and Deleting a Product:

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

4.3.2 Adding, Viewing and Deleting a File:

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

Deleting Files:

End of Term

Secondary Rental	0.00
Residual Value	0.00
<input type="button" value="Save Changes"/>	

Update Options

RBO Level	0.00
Periods Left	11
Settlement	118,933.75
Last Payment	14/10/2012
Last Notice	16/07/2012
Capital Amount	112,702.00

Notes

ID	Name	Note	Date

Internal Notes

ID	Name	Note	Date

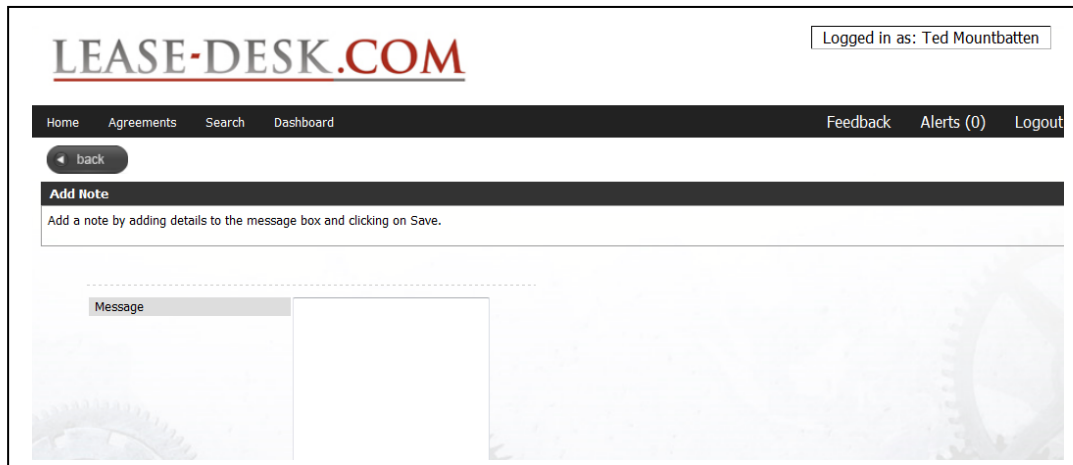
4.3.3 Adding a Note:

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

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

2. Click 

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



3. Type your message into the blank box

4. Click

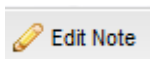


5. You will then be taken back to the main 'Edit Agreement' screen.

4.3.4 Editing a Note:

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

2. Click



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

LEASE-DESK.COM

Logged in as: Steve Barnard

Home Agreements Search Dashboard Feedback Alerts (43) Logout

back

Edit Note Details

Amend a current note by editing details within the message box and clicking on Save.

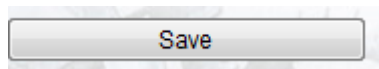
Username: Steve Barnard

Message: Customer called up wanting an update.

Save

3. Amend the Message

4. Click



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

4.3.5 Deleting a Note:

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

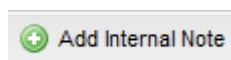
2. Click



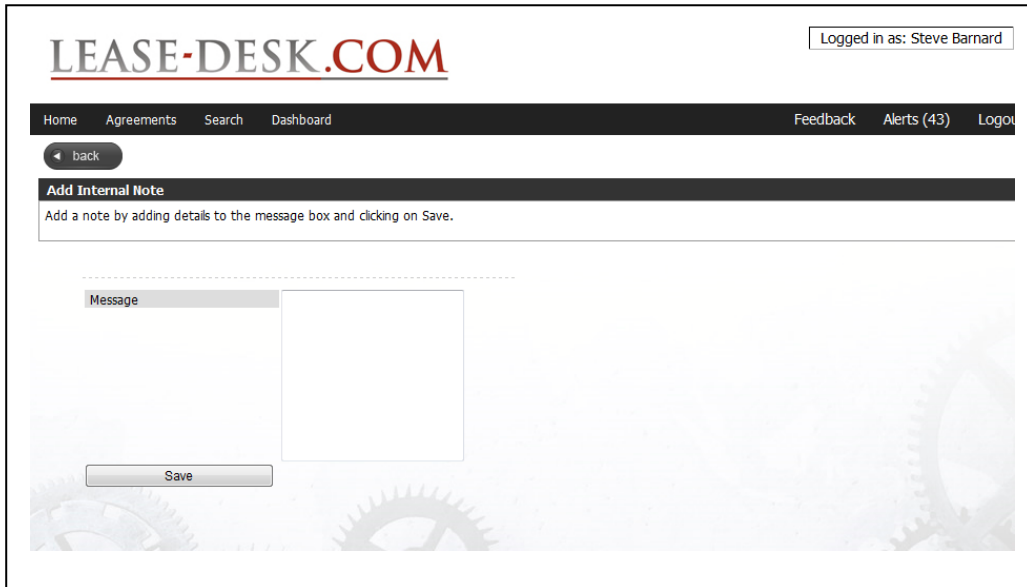
4.3.6 Adding an Internal Note:

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

2. Click

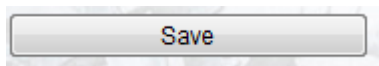


3. You will then be presented with the following 'Add Internal Note' screen;



4. Enter your message in the box.

5. Click

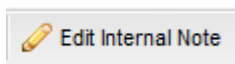


6. You will then be taken back to the main 'Edit Agreement' Screen.

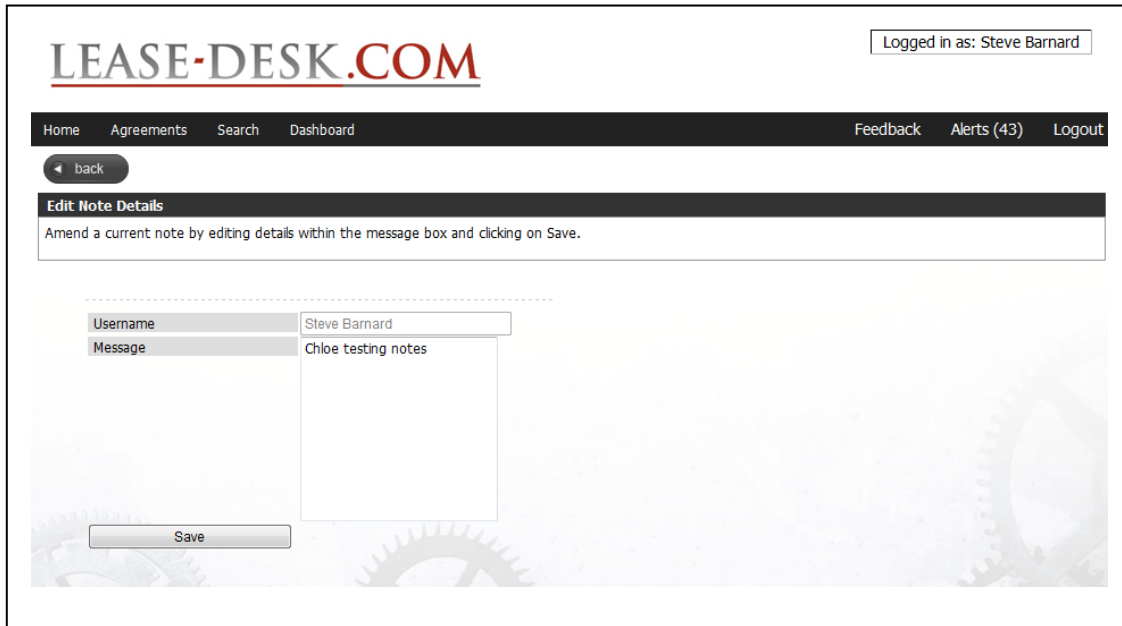
4.3.7 Editing an Internal Note:

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

2. Click

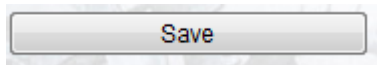


3. You will then be presented with the 'Edit Internal Note' screen as per below;



4. Amend the required message.

5. Click

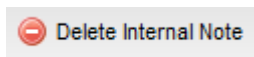


6. You will then be taken back to the main 'Edit Agreement' screen.

4.3.8 Deleting an Internal Note:

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

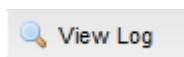
2. Click



4.4. Viewing an Audit Log:

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

2. Click



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

LEASE-DESK.COM

Logged in as: Steve Barnard

Home Agreements Search Dashboard Feedback Alerts (15) Logout

back

View Audit Log

Name	Date	Action
Steve Barnard	2010-02-23 16:57:17	Created new internal note with id: 61
Steve Barnard	2010-02-23 16:57:05	Created new note with id: 60
Steve Barnard	2010-02-23 16:39:50	Created new note with id: 57
Steve Barnard	2010-02-23 16:39:32	Created new internal note with id: 56

5.0 Search:

1. Go to **Search** on the top main menu.
2. You will be presented with the 'Search Agreements' screen as indicated below in two parts;

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.

Customer

Name

Customer Status All ▼

Agreement Status All ▼

Prospect Status All ▼

Search

Product

Name

Filter Add Remove

Customer

All ▼

Add Remove

Primary Contact

Agreement

Months Left All ▼

RBO Level All ▼

Customer Detail

SIC Code

The screenshot shows the 'Search Agreements' interface. It features several filter sections on the left and right. On the left, there are sections for 'Vendor', 'Group', and 'Provider', each with a list box and an 'All' dropdown, and 'Add'/'Remove' buttons. On the right, there is a 'Post Code' section with a list box and 'Filter', 'Add', and 'Remove' buttons. Below that are dropdowns for 'Turnover', 'Credit Limit', 'Credit Rating', and 'Employees', each with an 'All' dropdown. At the bottom right is the 'Output Type' section with a 'Report' dropdown set to 'Sample 1', and buttons for 'View Report', 'Export to CSV', and 'Reset Form'. A 'Financial Product Name' label is visible at the bottom left of the main content area.

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

5.1. Searching for Specific Customer Agreement Information:

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

The screenshot shows the 'Customer' filter section. It includes a 'Name' text input field with 'Al' entered. Below it are three dropdown menus for 'Customer Status', 'Agreement Status', and 'Prospect Status', all set to 'All'. A 'Search' button is located at the bottom of this section.

- b. Complete the following details if required/known or keep as All;
 - Agreement Status
 - Prospect Status (if previous Status is set to Prospect)

3. Click

Search

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;

The screenshot shows two filter tables. The first table, titled 'Customer', has a list of companies on the left: BDE Logistics Ltd, Beta Healthcare Ltd, Budget Hotel Ltd, and Barkers Financials Ltd. The second table, titled 'Primary Contact', has a list of names on the left: Pete Johnson, Hannah Martin, Sarah Barnes, and Charlotte Smith. Both tables have an 'Add' button and a 'Remove' button below them.

5. To include any of the produced data, within each table, highlight the required data, i.e.

Primary Contact, and then click

Add

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

The screenshot shows the 'Primary Contact' filter table. The list of names on the left now only includes Hannah Martin, Sarah Barnes, and Charlotte Smith. The name 'Pete Johnson' has been moved to the second box on the right. The 'Add' button is now highlighted with a dashed border.

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;

Turnover	All ▼
Credit Limit	All ▼
Credit Rating	All ▼
Employees	All ▼

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

Output Type

Report: Default ▼

- Default
- Management Report
- Sales Report
- Marketing Report (Full Details)
- Marketing Report (Email)
- Marketing Report (Postal)
- Marketing Report (Contact Details)
- Prospect Report

View Report

Reset Form

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

- 1. Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.
- 2. Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.
- 3. Marketing Report (Full Details):** With all details listed below.
- 4. Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.
- 5. Marketing Report (Postal):** As above, minus email but with full address details.
- 6. Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the 'Output Type', and select a report type from the drop down menu.

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

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

Search Agreements

Below are the results from your search

View Agreement View Log

ID	Customer Name	Prospect Status	Primary Vendor	Vendor User	Capital Amount
63	Alpha Media Ltd	Accepted	Second Telco Channel Ltd	Vanessa Smith	54600.00
429	AT Manufacturing	None	Second Telco Channel Ltd	Winston Armani	6000.00
8	AT Manufacturing	Proposed	Second Telco Channel Ltd	Winston Armani	140000.00
415	AT Manufacturing		Second Telco Channel Ltd	Paul Jones	21000.00
65	AT Manufacturing		Second Telco Channel Ltd	Winston Armani	147000.00
142	B.R.B. Engineering Ltd		Second Telco Channel Ltd	Mike Versace	479904.00
367	BC Insurance Services Ltd		Second Telco Channel Ltd	Winston Armani	21600.00

40 Page 1 of 2 Displaying 1 to 40 of 45 items

Report Prospect Report

View Report Export to CSV

Total	Amount
RBO	2,125,945.88

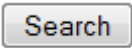
or **Export to CSV** to view in CSV format as per below;

2010-03-25-10-25-42-Search [Read-Only] - Microsoft Excel non-commercial use

ID	Identifier	Customer Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ Live	Hilda Ogd	125625.6	01/10/2010
2	6	1.19E+08 Alpha Mei Live	Mark Gils	11419.92	24/05/2010
3	8	0000/123 AT Manuf Secondary	Reece Asf	140000	26/02/2010
4	10	000/456 H Fashion Live	Mike Osbi	12932.6	31/12/2011
5	11	000/789 H Fashion Prospect	Sharon Wi	0	
6	12	000/101 H Fashion Live	Sharon Wi	17919.72	05/11/2010
7	13	000/102 H Fashion Live	Sharon Wi	22622.25	26/06/2010
8	58	1.4E+09 DD Financ Live	Hilda Ogd	8684.83	18/01/2012
9	63	1.4E+09 Alpha Mei Dead	Mark Gils	14342.32	09/11/2011
10	65	1.4E+09 AT Manuf Dead	Reece Asf	183907.7	14/02/2009
11	67	1.4E+09 H Fashion Dead	Mike Osbi	37339.52	14/10/2009
12	68	1.4E+09 H Fashion Dead	Sharon Wi	134419.3	03/10/2009
13	70	1.4E+09 H Fashion Live	Sharon Wi	5565.55	09/04/2012
14	75	TEST1023 OK Manuf Prospect	Emma Pet	0	
15	76	TEST1024 KM Prope Prospect	Tony Mad	0	
16	77	TEST1025 Beta Heali Prospect	Hannah M	0	
17					

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'

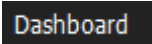
2. Click 
3. As indicated in previous steps, select any of the information using filters or leave as 'All'.
4. Follow the previous step 9 on how to select report type and view data.

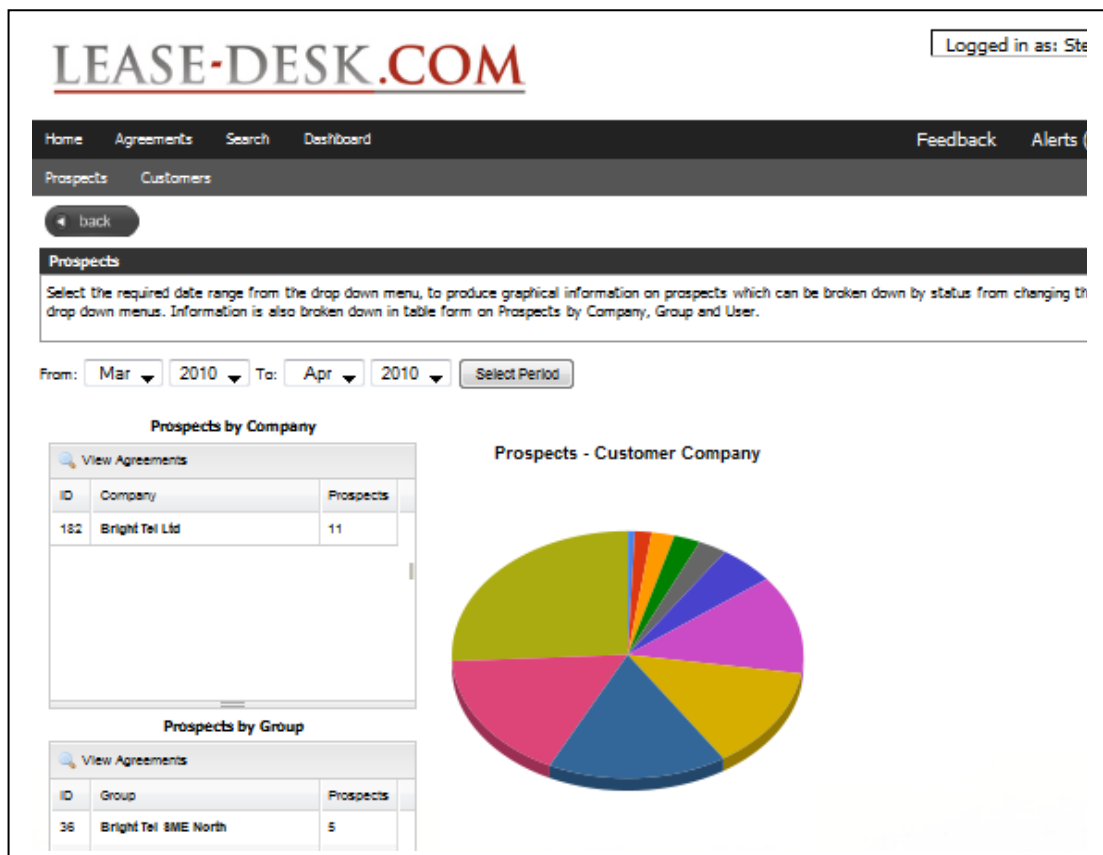
6. Dashboard:

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

6.1. Prospects:

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

1. Go to  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.

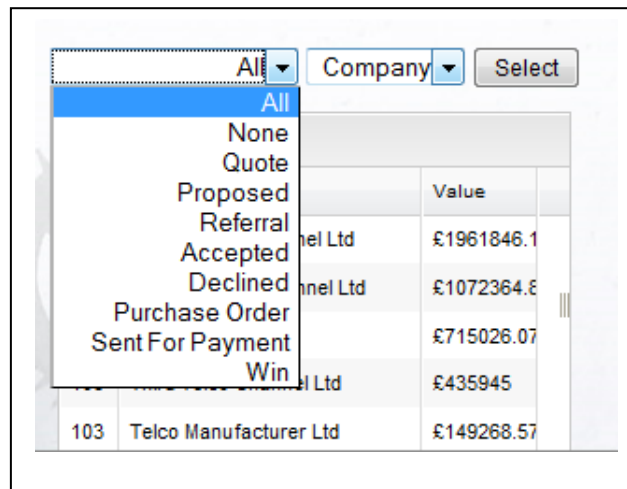
5. To view any of the information in the tables shown, highlight the required line of

information and click

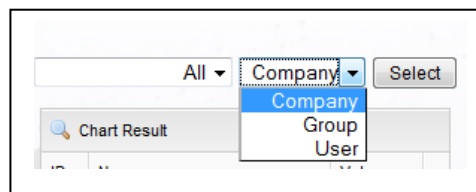
6. Alternatively, double click on the required line.

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



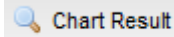
3. You will then be presented with the required information within the table below.

The screenshot shows the resulting table after selecting the 'Company' option. The table has columns for 'ID', 'Name', and 'Value'. The table contains several rows of data, including '176 Fourth Telco Channel Ltd' with a value of '£1961846.1', '105 Second Telco Channel Ltd' with a value of '£1072364.8', '102 Telco Channel Ltd' with a value of '£715026.07', '106 Third Telco Channel Ltd' with a value of '£435945', and '103 Telco Manufacturer Ltd' with a value of '£149268.57'.

ID	Name	Value
176	Fourth Telco Channel Ltd	£1961846.1
105	Second Telco Channel Ltd	£1072364.8
102	Telco Channel Ltd	£715026.07
106	Third Telco Channel Ltd	£435945
103	Telco Manufacturer Ltd	£149268.57

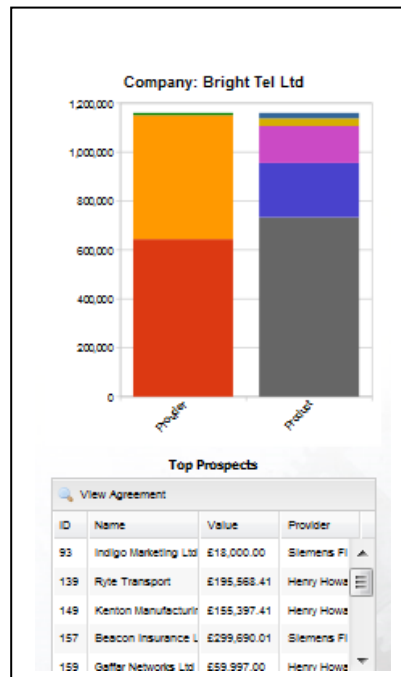
4. Highlight the individual line of information required; Company, User or Group.

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 diagram with your mouse.



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

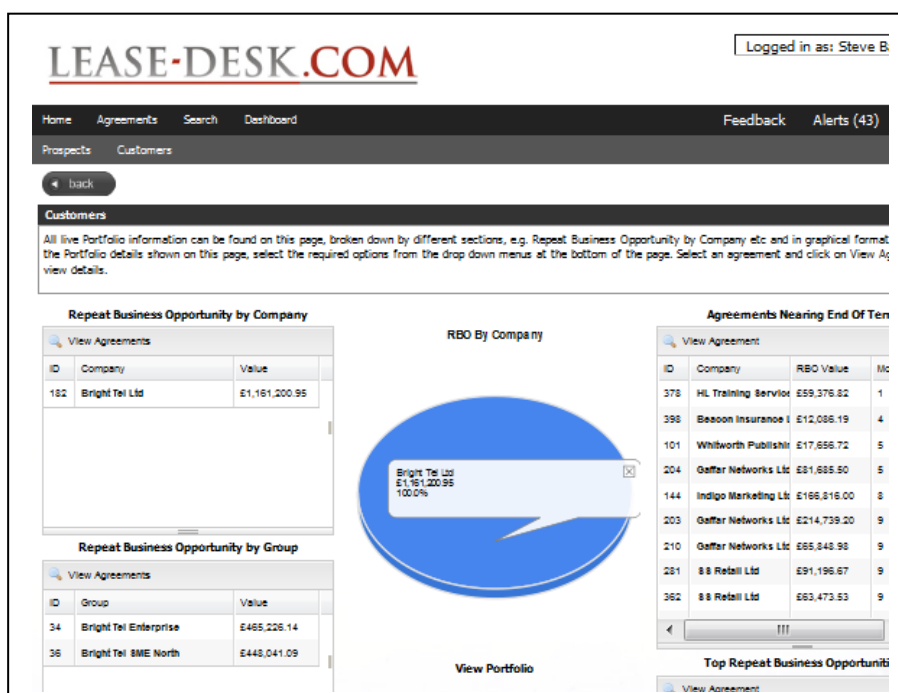
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

6.2. Customers:

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

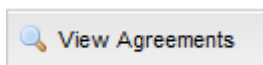
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

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



3. To view any of the individual agreement information within any of the tables as indicated

above, highlight the relevant line within the table and click



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

LEASE-DESK.COM

Logged in as: Chloe Whitbread

Home Users Agreements Companies Financial Products Imports Search Dashboard Feedback Alerts (0) Logout

back

Repeat Business Opportunity by Group

Below are the results from your search

[Add Agreement](#)
[Edit Agreement](#)
[Delete Agreement](#)
[View Agreement](#)
[Edit Calculation](#)
[View Log](#)

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
48	123-0099	Burnley College	Live	Terry Test	257779.84	01/03/2012

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

View Portfolio

Company

Please select

ID	Name	Value
105	Second Telco Channel Ltd	£69267
106	Third Telco Channel Ltd	£77707
104	Telco Distributor Ltd	£171245
102	Telco Channel Ltd	£103390

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

3. Click


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

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

Please select

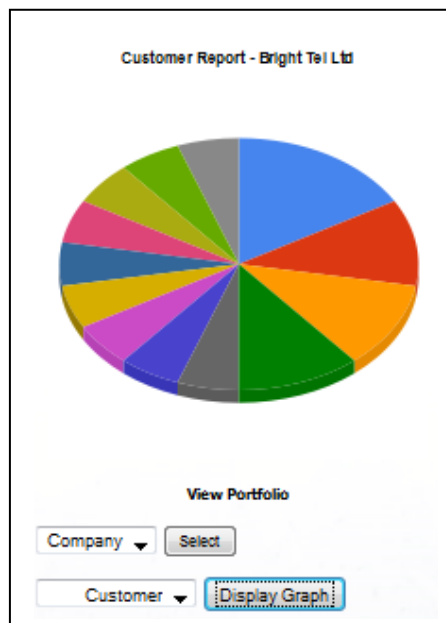
Please select

	Value
Provider	
Customer	
Product	Distributor Ltd £171245
Term	ico Channel Ltd £116203
Status	
SIC code	munications Ltd £68564
Months to Run	
102	elco Channel Ltd £723205
138	Comms VAR Ltd £746200
136	Data Communications Ltd £516982



6. Highlight the required row from the table and click

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



7. Alerts:

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

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

The Alert Triggers are as follows;

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

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

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

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

LEASE-DESK.COM

Logged in as: Eddie Large

Home Agreements Search Dashboard Feedback Alerts (5) Logout

back

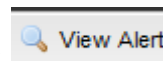
My Alerts

A full list of pending alerts requiring user action.

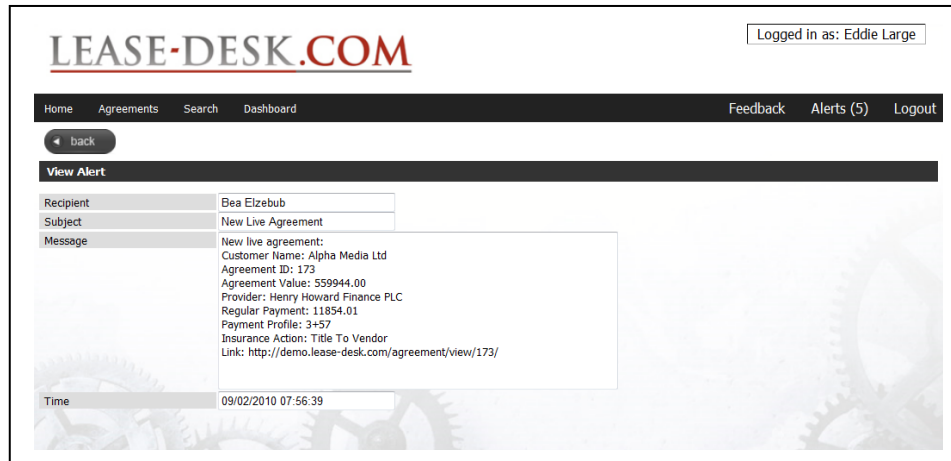
View Alert Completed Alert

ID	Recipient	Subject	Message	Time
87	Bea Elzebub	New Live Agreement	New live agreement Customer Name: Alpha Media Ltd Agreement ID: 173 Agreement Value: 559944.00 Provider: Henry Howard Finance PLC Regular Payment: 11854.01 Payment Profile: 3+57 Insurance Action: Title To Vendor Link: http://demo.lease-desk.com/agreementView/173/	09/02/2010 07:56:39
75	James Purple	New Live Agreement	New live agreement Customer Name: H Fashion Retail Ltd Agreement ID: 75	08/02/2010 11:27:04

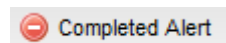
3. To view an alert, highlight the required alert and click



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



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

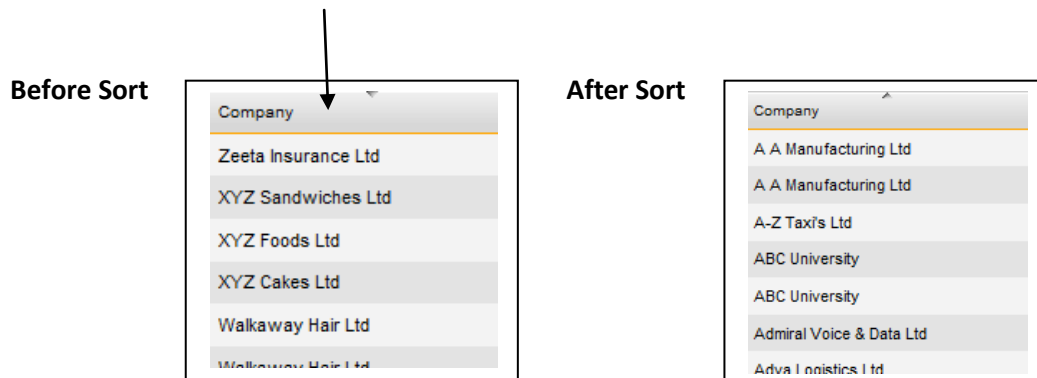


8. General Functionality:

8.1. Sort:


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

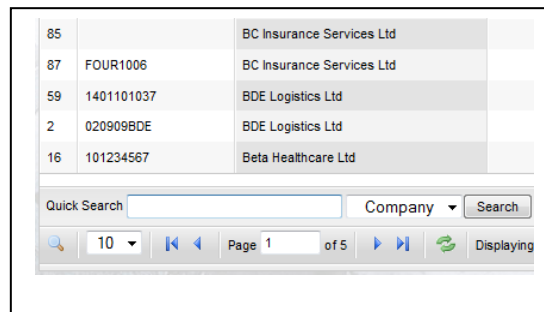
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.



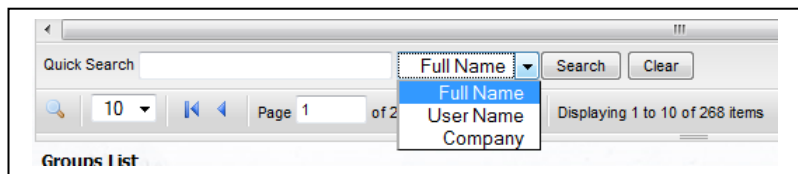
8.2 Quick Search:

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

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



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



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

4. Click to search for the information

5. Click to start from the beginning.

8.3 Refresh:

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

8.4 Scrolling through records:

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



Forward to next page of records



Forward to end of records



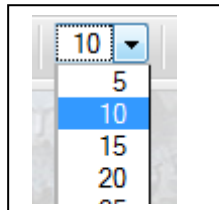
Go back to previous page of records



Go to the start of the records

8.5 Changing the amount of records per view:

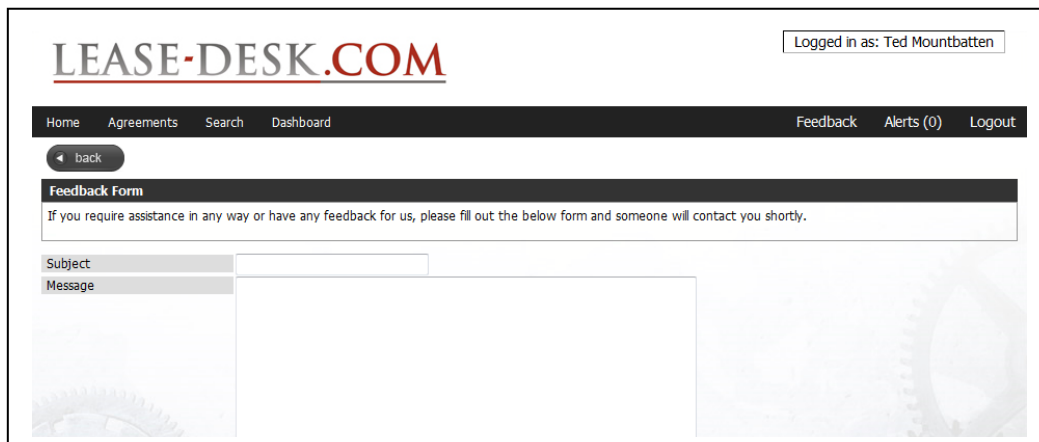
2. At the bottom of each table, select the drop down list to change the number of records viewed on a page at a time, as per below.



9. Feedback:

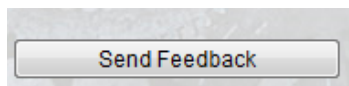
4. To contact Proctor Consulting's Lease-Desk administration team with any feedback, query or issue, from the main menu select **Feedback**

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



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

7. Once completed, click



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

Feedback Form: Complete

Thank you for completing the feedback form

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

10. Contact Details:

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

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

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Email: info@Lease-Desk.com
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