LEASE-DESK

Normal Access User Manual

Version 1.0

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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.

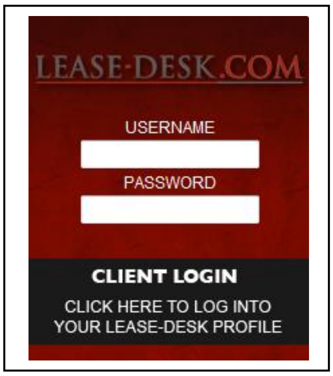
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

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

2. Logging into Lease-Desk:

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



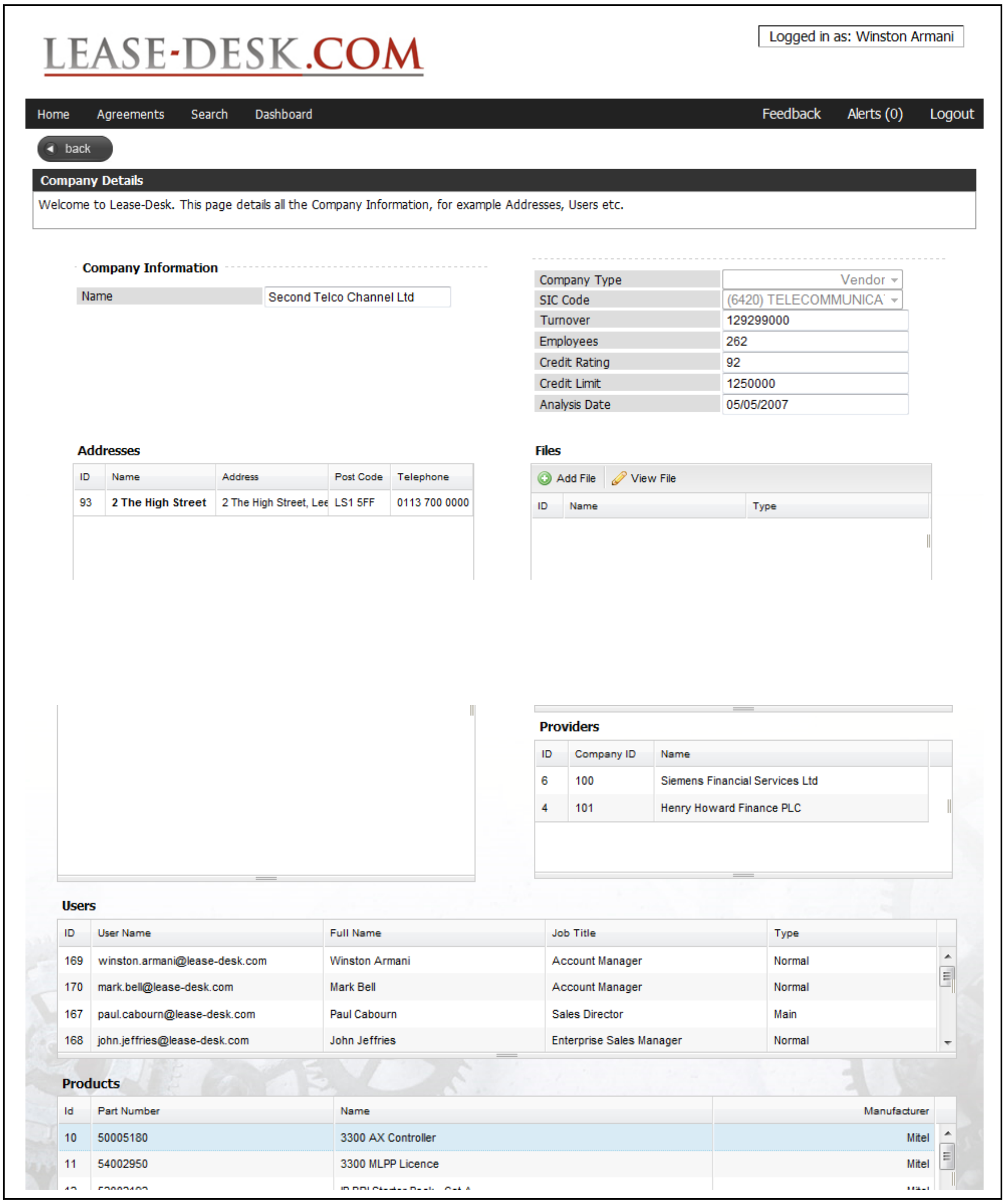
2. You will then be presented with the User Login page, as per below.

3. Enter your details and click on Login

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

3. Home Screen: Adding, & Viewing

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



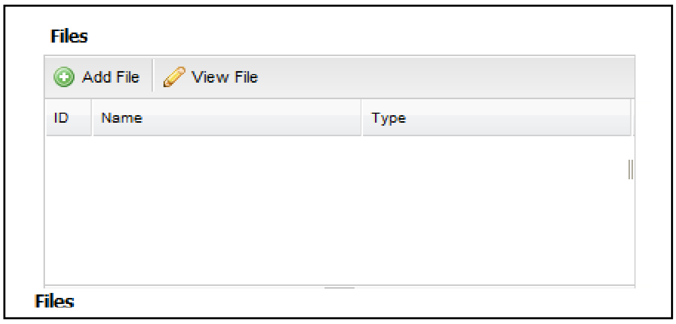
2. This screen details information relating to your company such as Addresses, Files, Users, Products (if you are a Vendor), and Financial Products (if you are a Financial Provider).

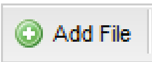
3.1. Adding and Viewing Files:

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

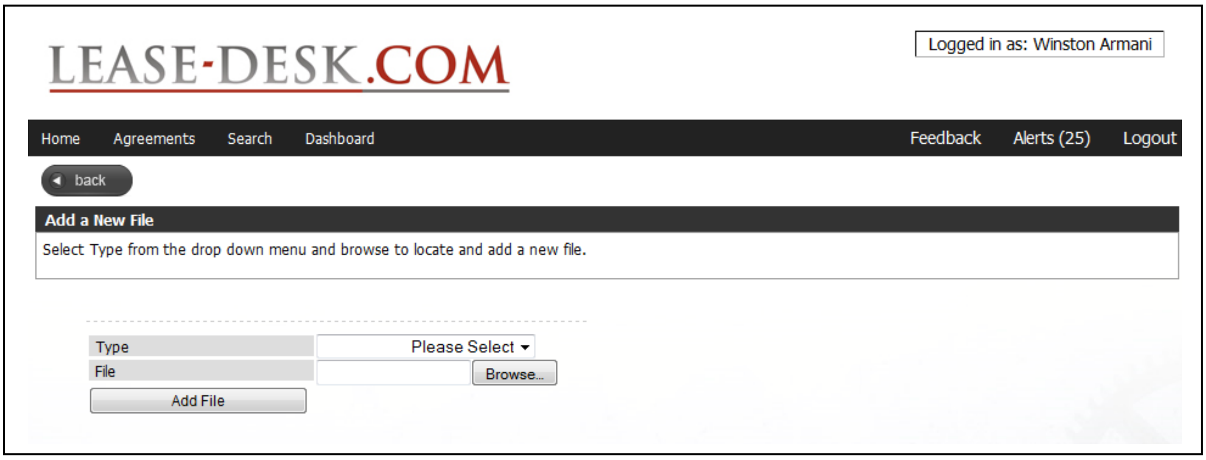
3.1.1. Adding a File:

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



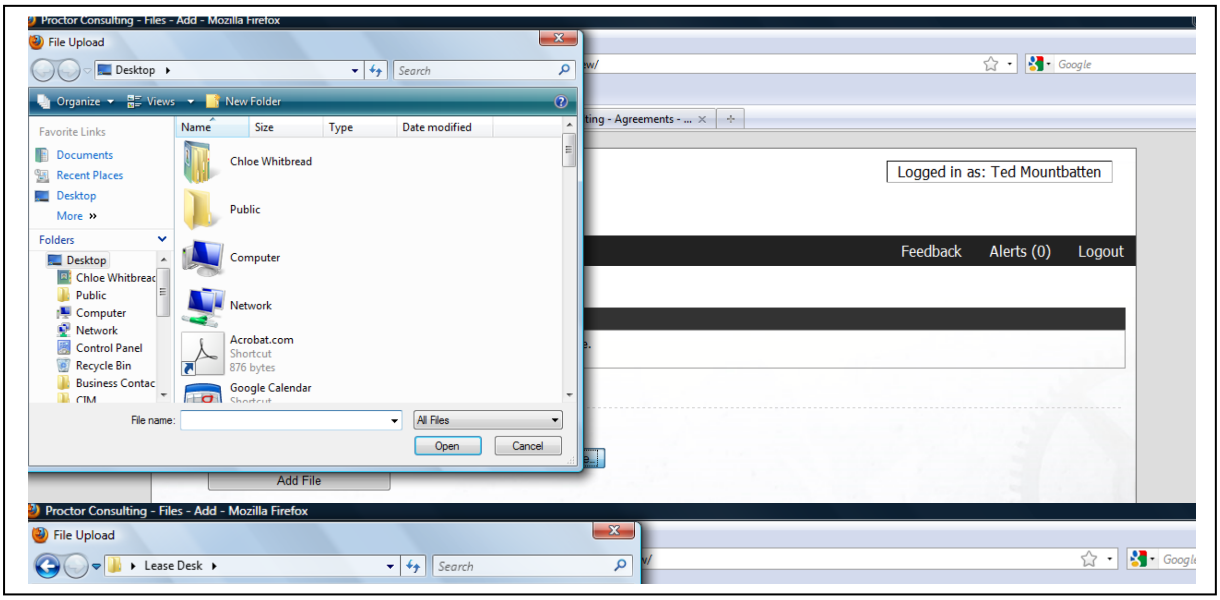
2. To add a file against your Company Details, click 

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



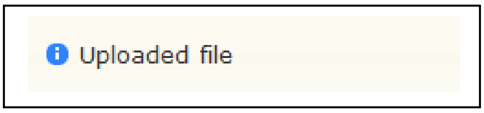
4. Select a ‘Type’ from the drop down menu, for example Credit Report, Management Accounts etc.

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



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

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



3.1.2. Viewing a File:

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

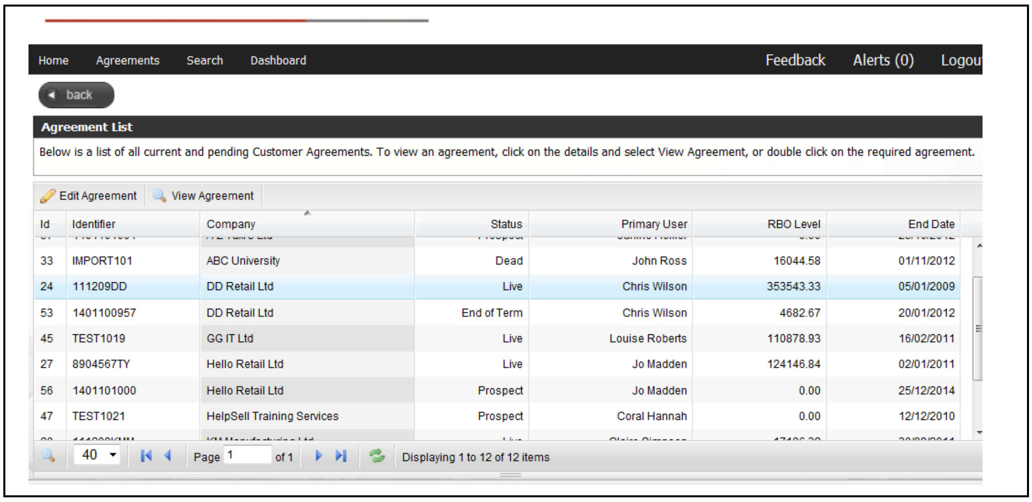
2. Click 

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

4.1. Viewing an Agreement:

1. From the top toolbar menu, select **Agreements**

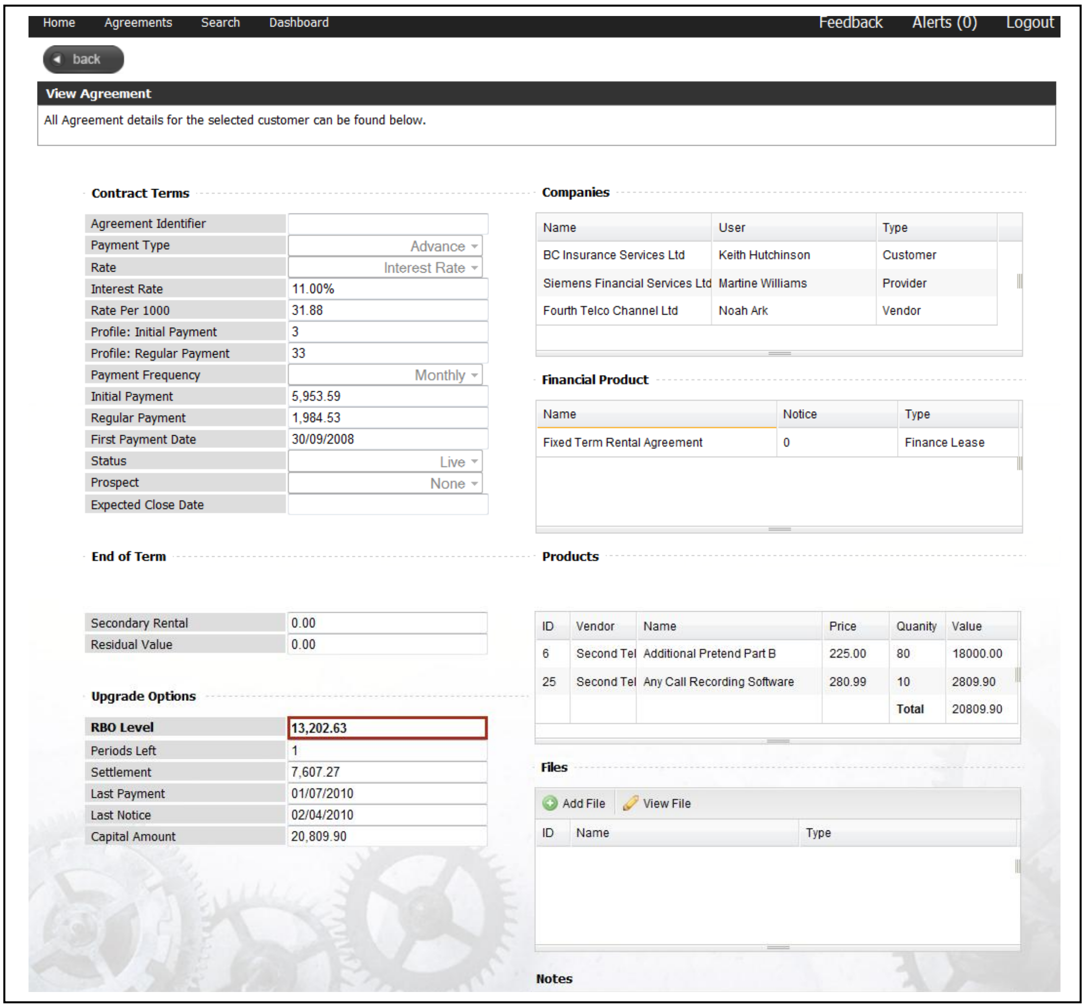
2. You will then be presented with all of the live and prospect agreements for which you are either associated with, or are able to view due to your role status, i.e. Reader or Reader/Writer (Refer to Chapter 1: Introduction to Lease-Desk for further information).



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

4. Click **View Agreement**

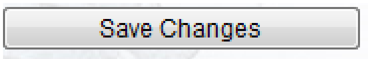
5. You will then be presented with the full 'View Agreement Details' screen (as indicated on the following page)



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

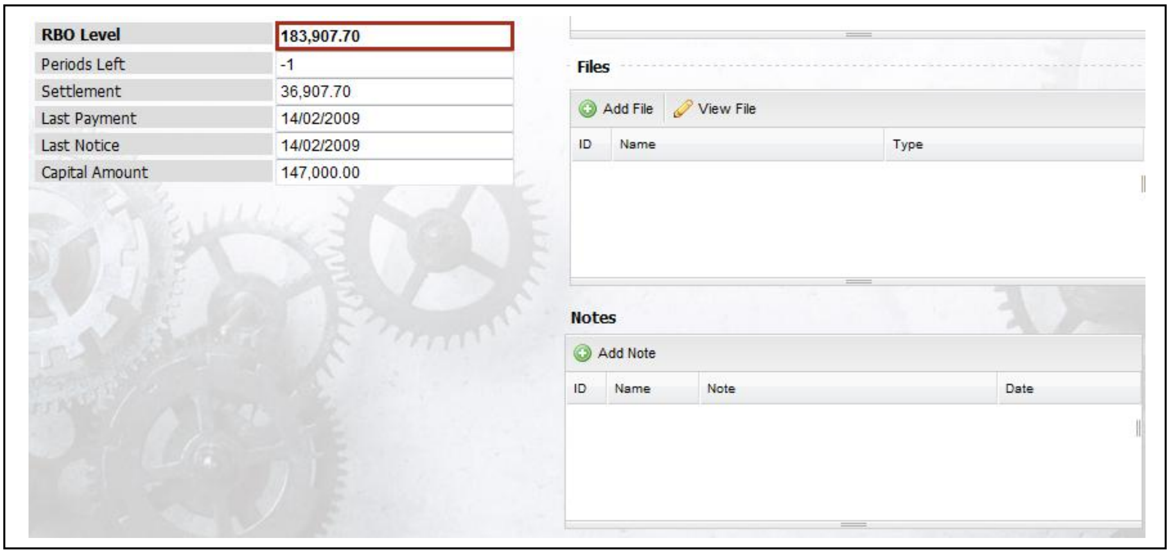
Note: Upgrade Options:

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.

5. Once details have been amended, click 

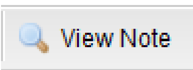
4.1.1 Adding and Viewing a File:

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



4.1.2 Viewing a Note:

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

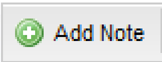
2. Click 

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;

4.1.3 Adding a Note:

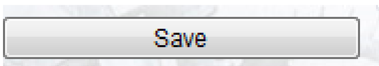
Note: When you add a note to an Agreement, an email alert will get generated to all members associated with the Agreement.

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;

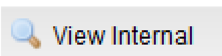
3. Type your message into the blank box

4. Click 

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

4.1.4 Viewing an Internal Note:

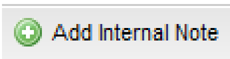
1. Within the main 'View Agreement' screen, go to the Notes table.

2. Click 

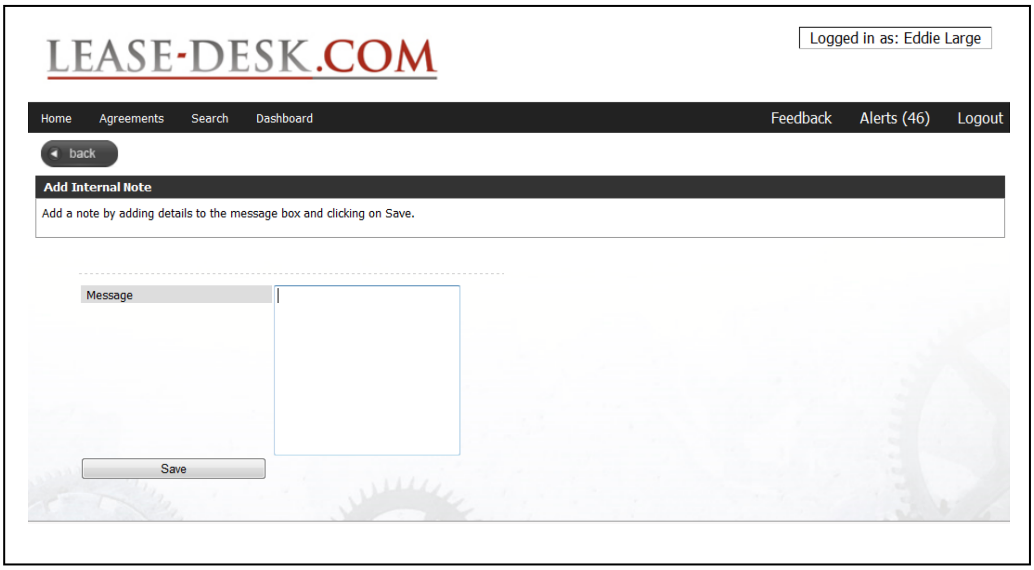
3. You will then be presented with the 'View an Internal Note' screen which will provide all details of which user added the note and when, as indicated below;

4.1.5 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 Save

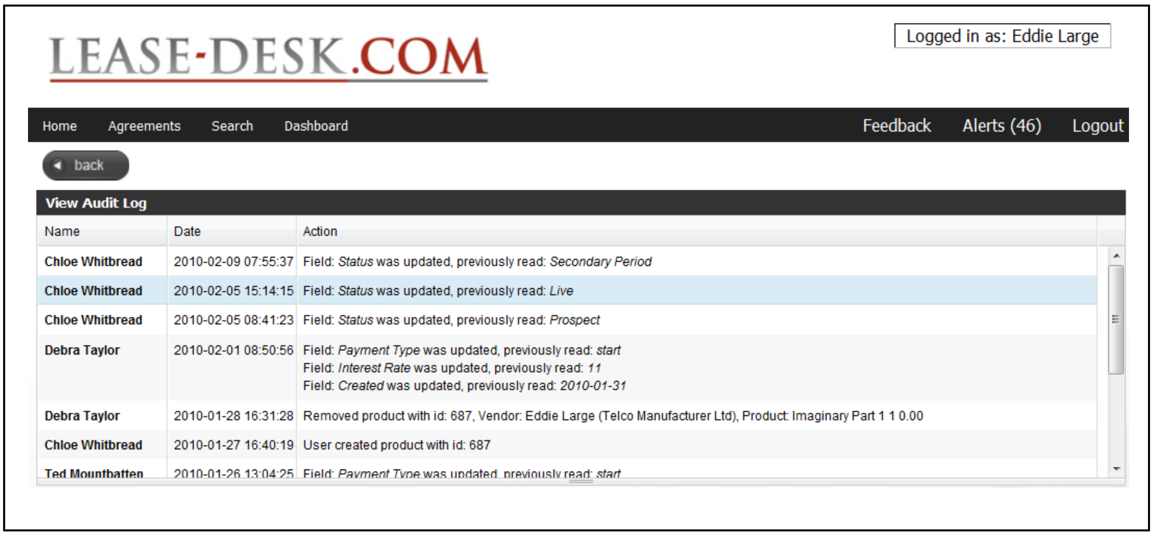
6. You will then be taken back to the main 'Edit Agreement' Screen.

4.2. Viewing an Audit Log:

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

2. Click View Log

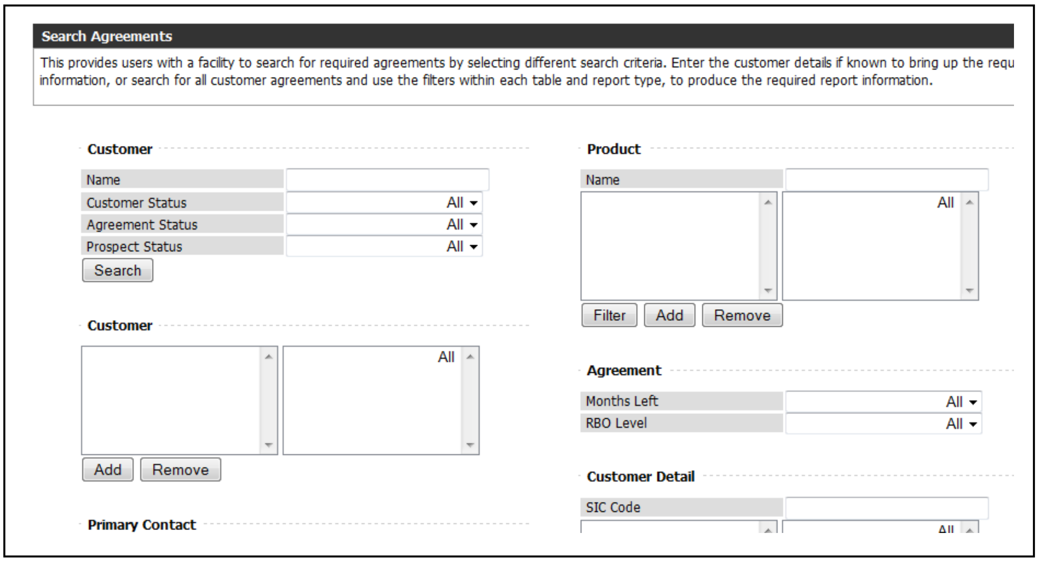
3. You will then be presented with the 'View Audit Log' screens which details all user action against the selected Agreement, as indicated below;

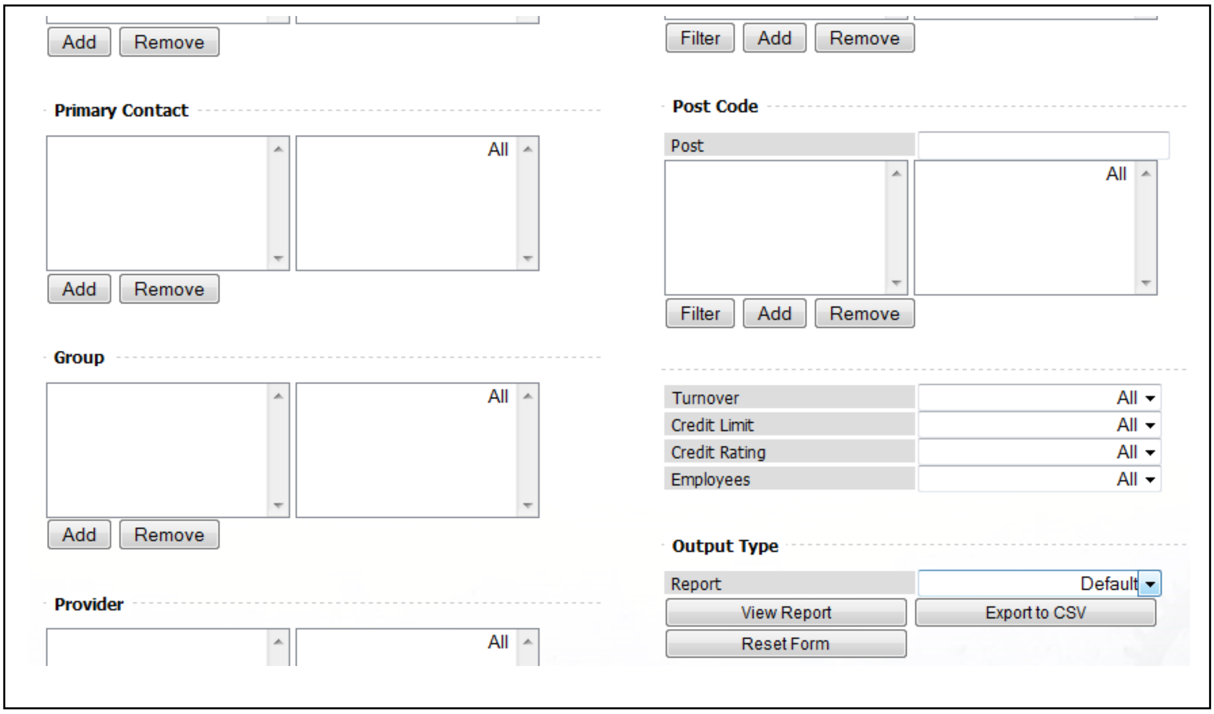


5.0 Search:

1. Go to Search on the top main menu.

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

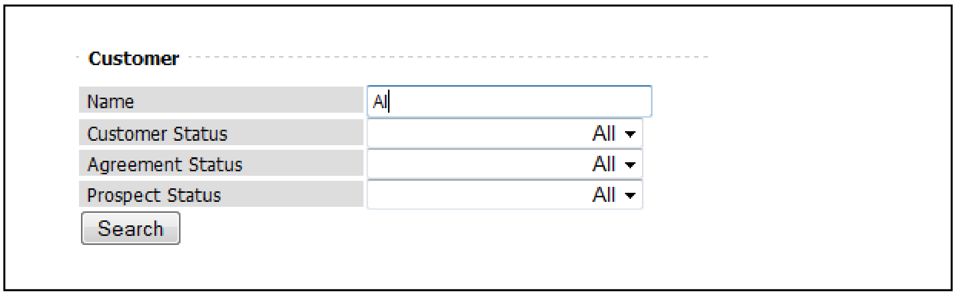




3. The Search Agreements screen, allows you to search for all agreement information that you have access to (determined by role type), by using the different filters.

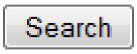
5.1. Searching for Specific Customer Agreement Information:

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

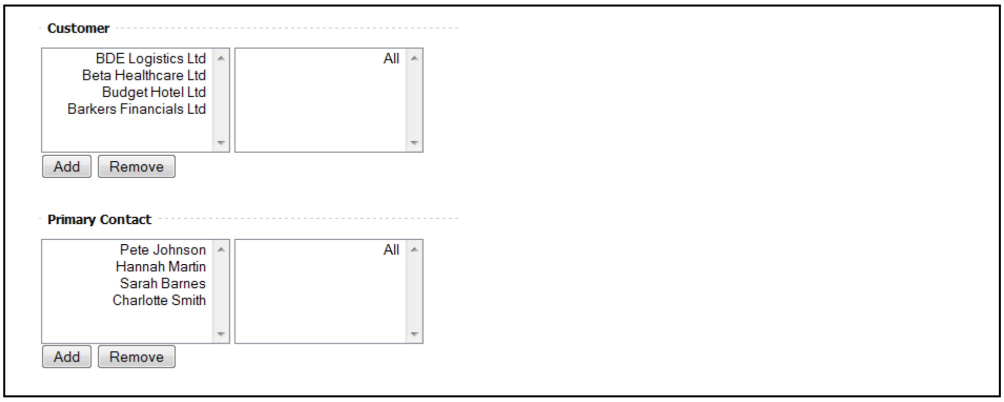


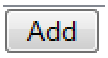
b. Complete the following details if required/known or keep as All;

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

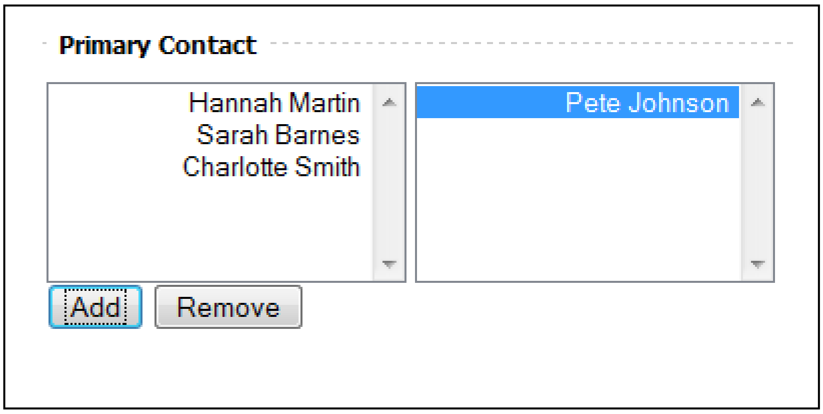
3. Click 

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



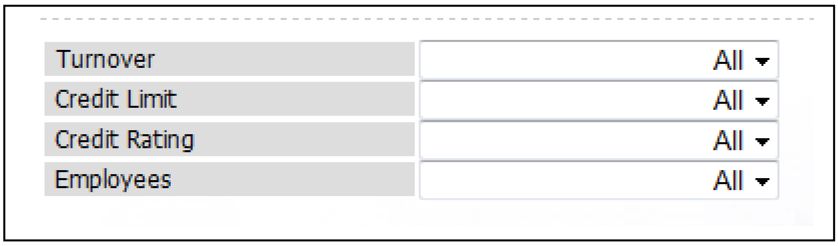
5. To include any of the produced data, within each table, highlight the required data, i.e. Primary Contact, and then click 

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

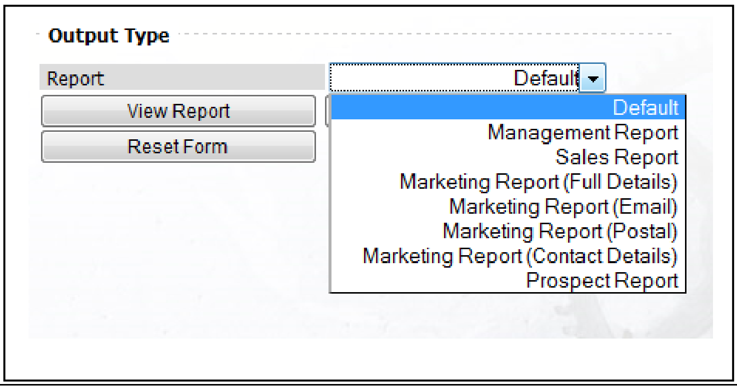


7. Carry on with each table required, following the previous step.

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



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



Note: There are six 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.

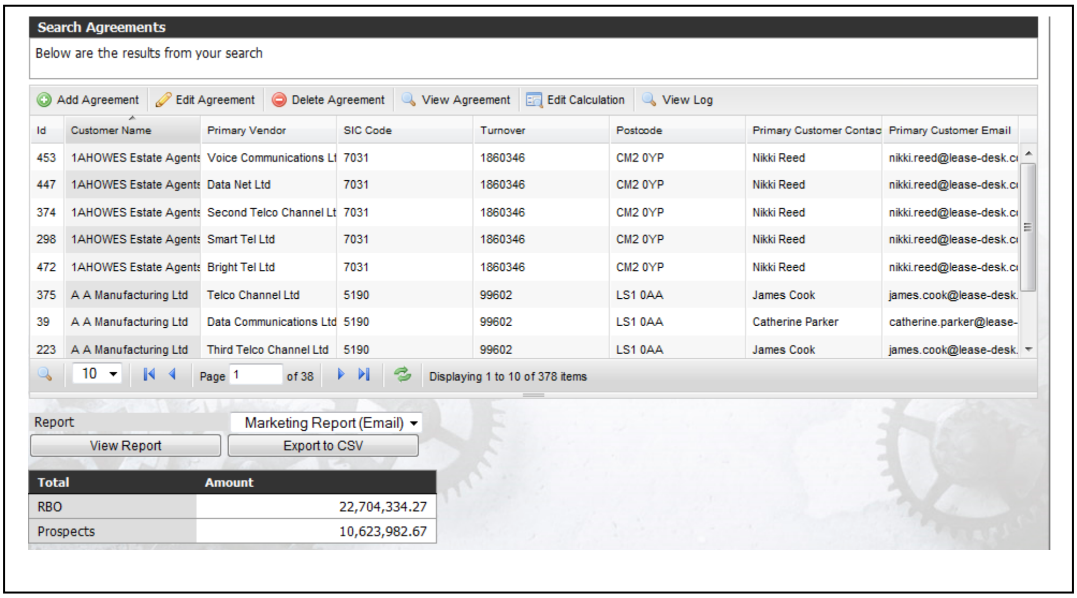
4. **Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.

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.

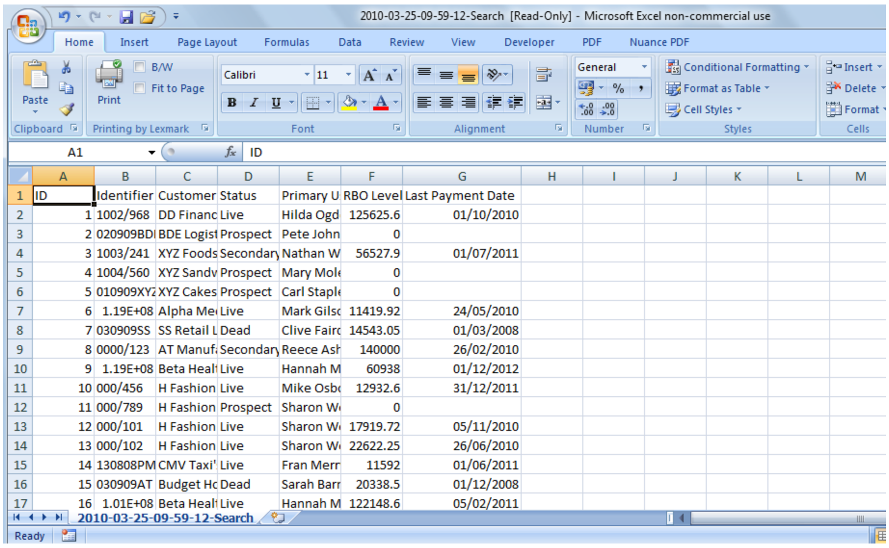
7. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

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



or 

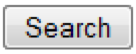
to view in CSV format as per below;



	A	B	C	D	E	F	G
1	ID	Identifier	Customer	Status	Primary U	RBO Level	Last Payment Date
2	1	1002/968	DD Financ	Live	Hilda Ogd	125625.6	01/10/2010
3	2	020909BDI	BDE Logist	Prospect	Pete John	0	
4	3	1003/241	XYZ Foods	Secondary	Nathan W	56527.9	01/07/2011
5	4	1004/560	XYZ Sandv	Prospect	Mary Mole	0	
6	5	010909XYZ	XYZ Cakes	Prospect	Carl Staple	0	
7	6	1.19E+08	Alpha Me	Live	Mark Gilsc	11419.92	24/05/2010
8	7	030909SS	SS Retail L	Dead	Clive Fairc	14543.05	01/03/2008
9	8	0000/123	AT Manufa	Secondary	Reece Ash	140000	26/02/2010
10	9	1.19E+08	Beta Healt	Live	Hannah M	60938	01/12/2012
11	10	000/456	H Fashion	Live	Mike Osbo	12932.6	31/12/2011
12	11	000/789	H Fashion	Prospect	Sharon W	0	
13	12	000/101	H Fashion	Live	Sharon W	17919.72	05/11/2010
14	13	000/102	H Fashion	Live	Sharon W	22622.25	26/06/2010
15	14	130808PM	CMV Taxi'	Live	Fran Merr	11592	01/06/2011
16	15	030909AT	Budget Ho	Dead	Sarah Barr	20338.5	01/12/2008
17	16	1.01E+08	Beta Healt	Live	Hannah M	122148.6	05/02/2011

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:

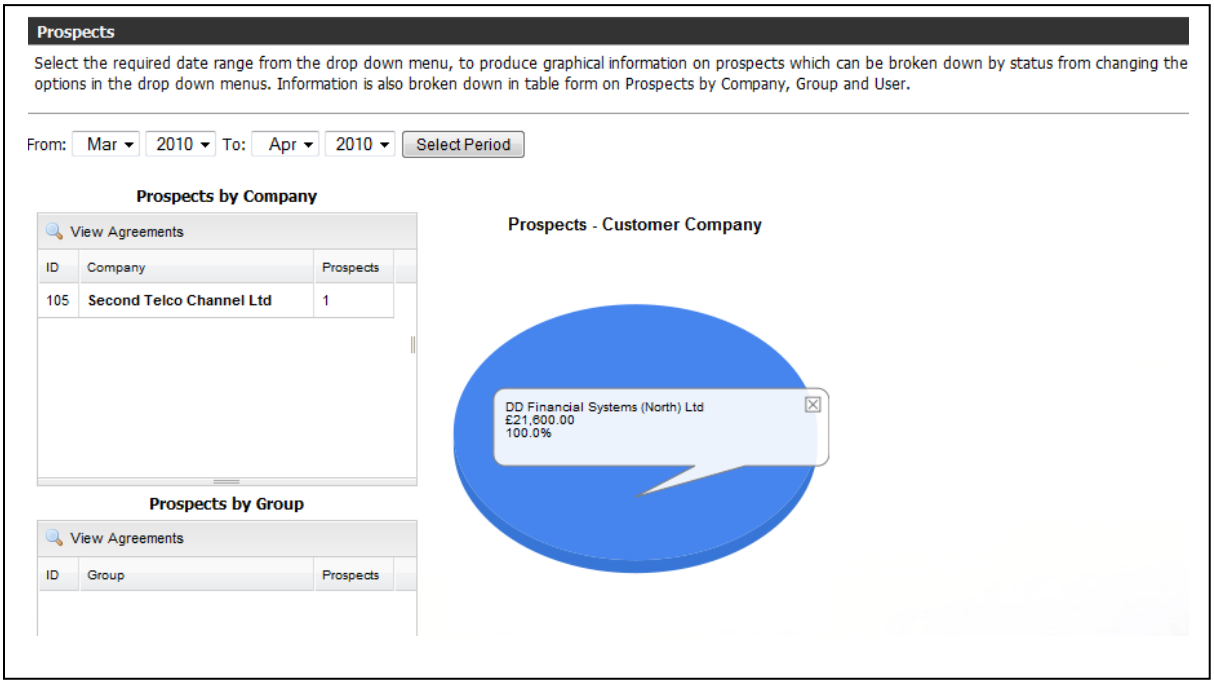
This screen provides users with a snap shot all organisational live and Prospect agreement information determined by role type.

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 Dashboard on the main top menu.

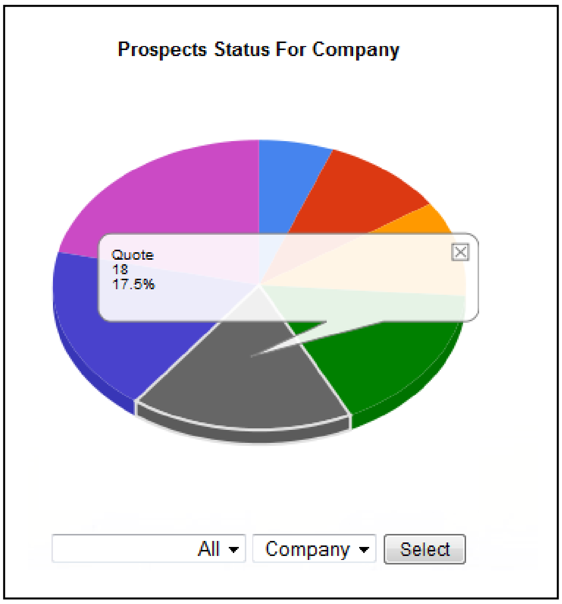
2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a graph showing all figures, as indicated below;



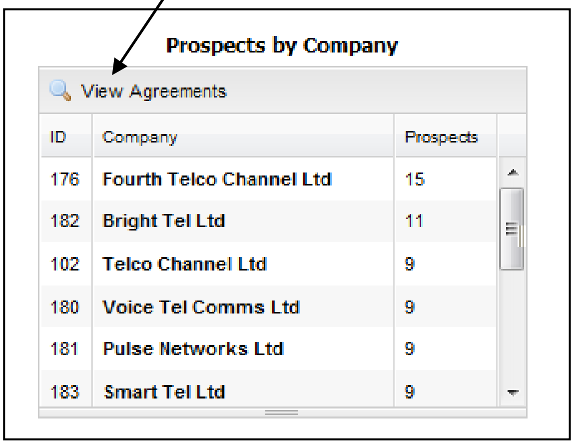
3. From the date range at the top of the page, select the required date and click Select Period

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

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



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



Prospects by Company

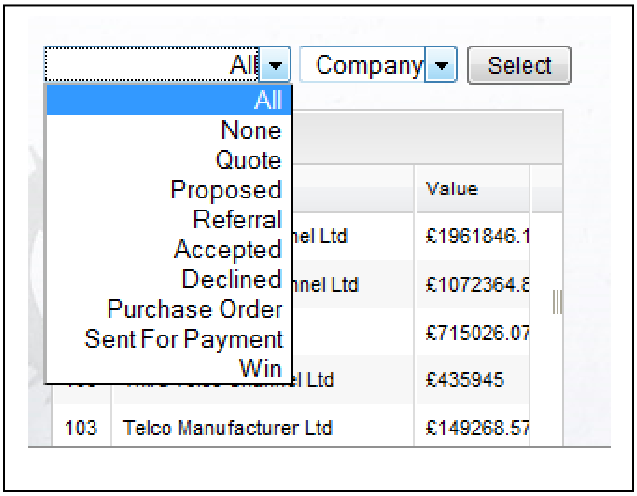
View Agreements

ID	Company	Prospects
176	Fourth Telco Channel Ltd	15
182	Bright Tel Ltd	11
102	Telco Channel Ltd	9
180	Voice Tel Comms Ltd	9
181	Pulse Networks Ltd	9
183	Smart Tel Ltd	9

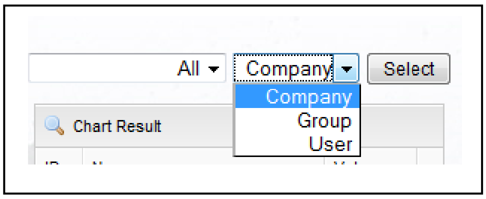
6. Alternatively, double click on the required line.

6.1.1 Viewing Top Prospect Information in Graphical Format:

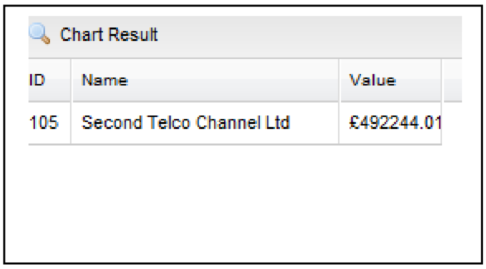
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



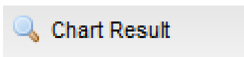
2. Select User, Group or Company from the second drop down menu box.



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

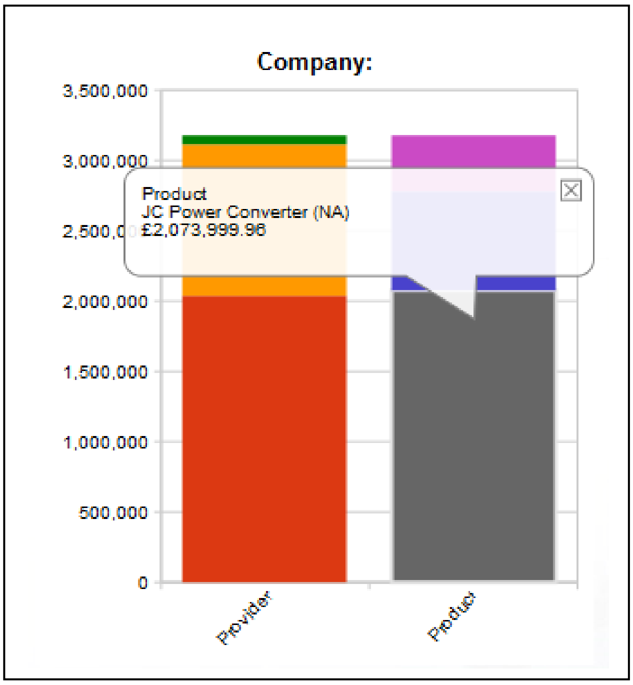


4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click 

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

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



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

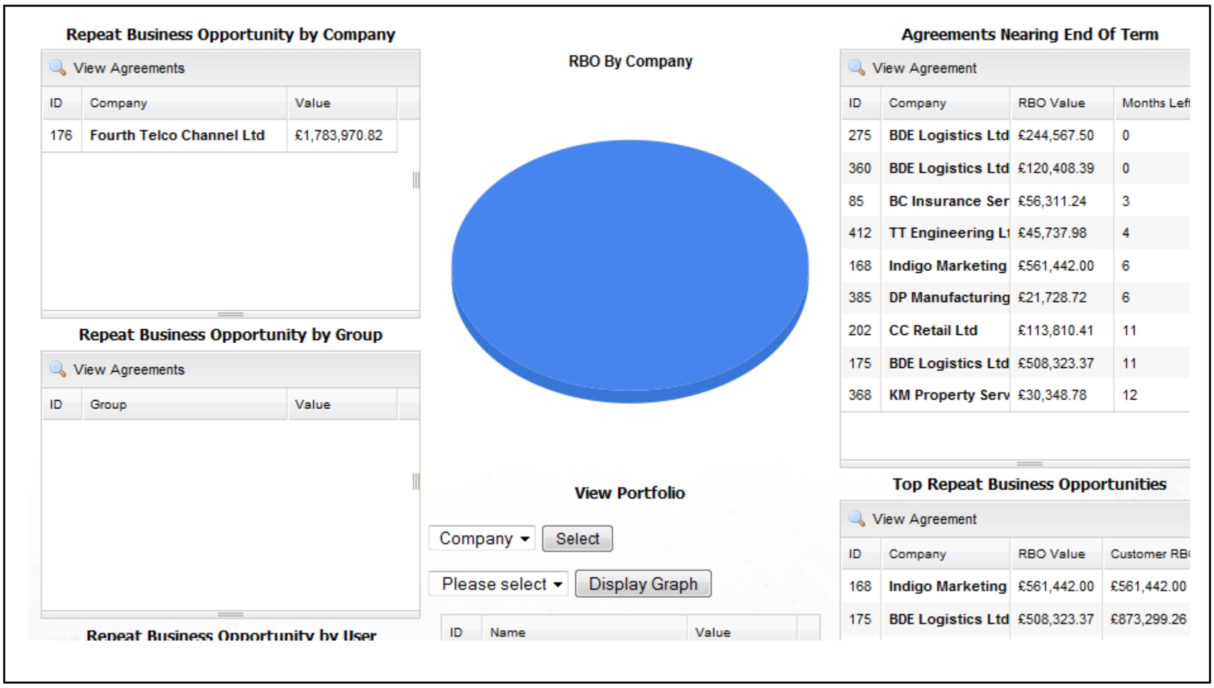
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

6.2. Customers:

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

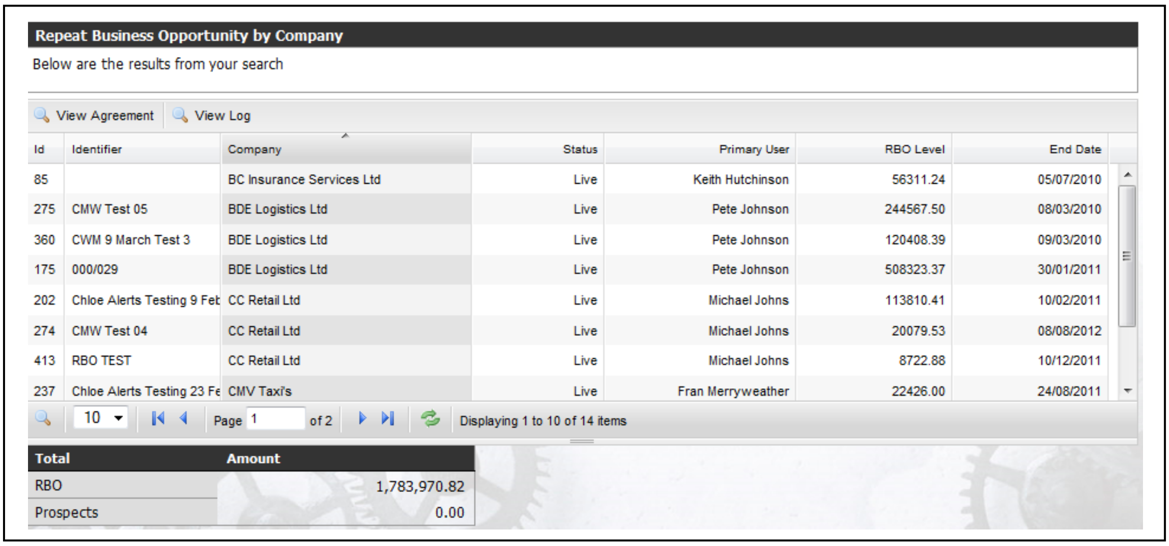
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- **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 View Agreements

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



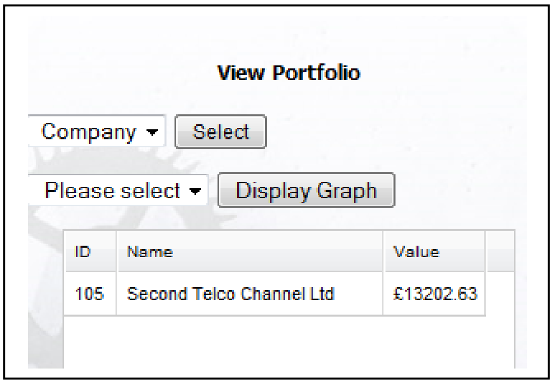
Id	Identifier	Company	Status	Primary User	RBO Level	End Date
85		BC Insurance Services Ltd	Live	Keith Hutchinson	56311.24	05/07/2010
275	CMW Test 05	BDE Logistics Ltd	Live	Pete Johnson	244567.50	08/03/2010
360	CWM 9 March Test 3	BDE Logistics Ltd	Live	Pete Johnson	120408.39	09/03/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	508323.37	30/01/2011
202	Chloe Alerts Testing 9 Fet	CC Retail Ltd	Live	Michael Johns	113810.41	10/02/2011
274	CMW Test 04	CC Retail Ltd	Live	Michael Johns	20079.53	08/08/2012
413	RBO TEST	CC Retail Ltd	Live	Michael Johns	8722.88	10/12/2011
237	Chloe Alerts Testing 23 Fe	CMV Taxi's	Live	Fran Merryweather	22426.00	24/08/2011

Total	Amount
RBO	1,783,970.82
Prospects	0.00

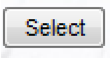
5. You then have the option to Add a completely new Agreement, Edit Agreement, or View Agreement, and View Log. Refer back to Chapter 4 for details on how to do this.

6.2.1 Viewing/Amending Portfolio Information:

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

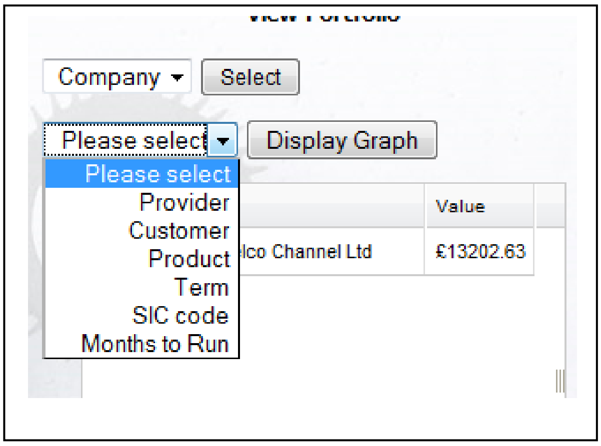


2. In the first drop down menu, select the required grouping option (Company, Group or User).

3. Click 

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

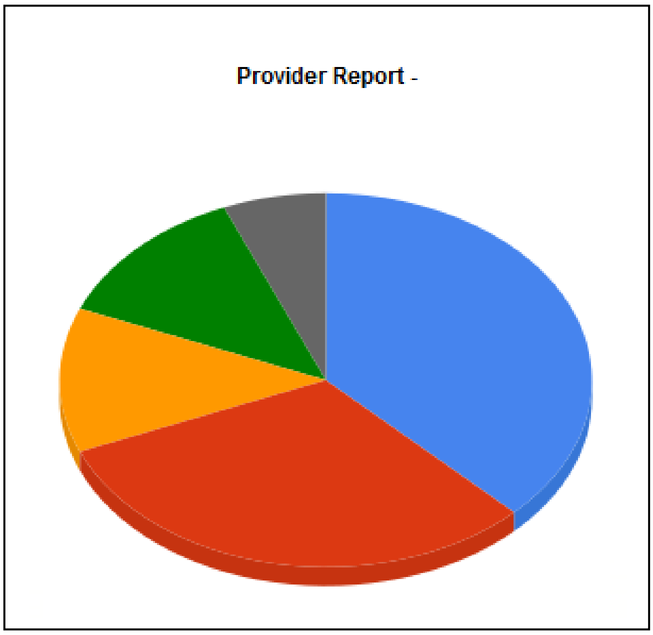
5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click Display Graph

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

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



7. Alerts:

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

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

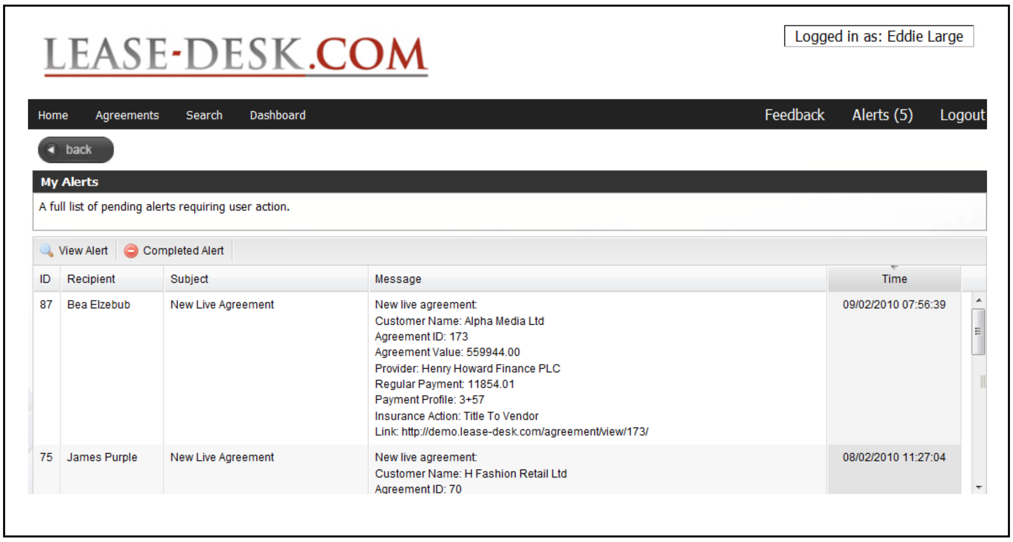
The Alert Triggers are as follows;

- When a new Agreement is added to the system as a live, or Prospect contract.
- When a Prospect changes to a live customer (The vendor will be emailed to send insurance details).

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

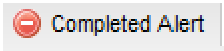
1. To view your individual or team user alerts, select Alerts (0) from the top menu.

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



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

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

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

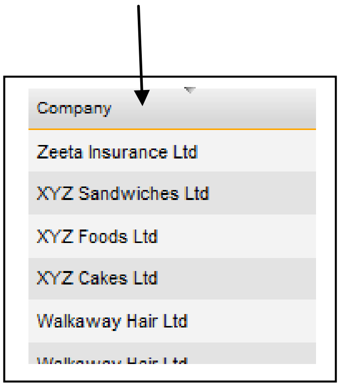
8. General Functionality:

8.1. Sort:

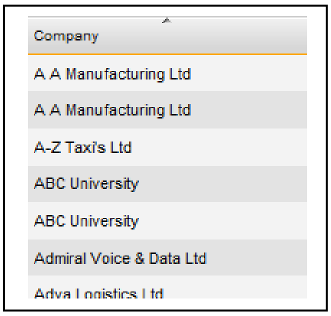
Within Lease-Desk, within any of the main tables, for example Companies, Users, Financial Products, is the ability to 'Sort' each column of information in alphabetical or numerical order by the column heading.

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

Before Sort



After Sort

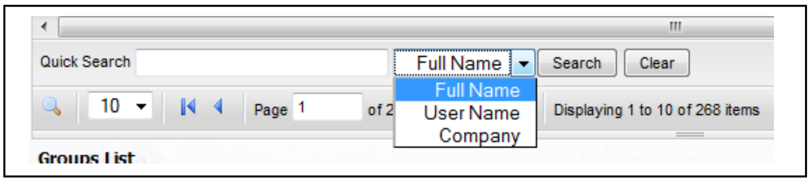


8.2 Quick Search:

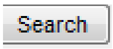
Within Lease-Desk is a 'Quick Search' functionality within the majority of main tables, for example, Companies, Users, Groups etc, allowing easy access to the required information.

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

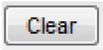
2. This will then bring up the quick search options for the screen you are in, as per below;



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

4. Click 

to search for the information

5. Click 

to start from the beginning.

8.3 Refresh:

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

8.4 Scrolling through records:

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

 Forward to next page of records

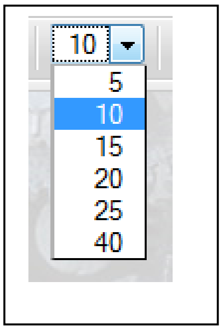
 Forward to end of records

 Go back to previous page of records

 Go to the start of the records

8.5 Changing the amount of records per view:

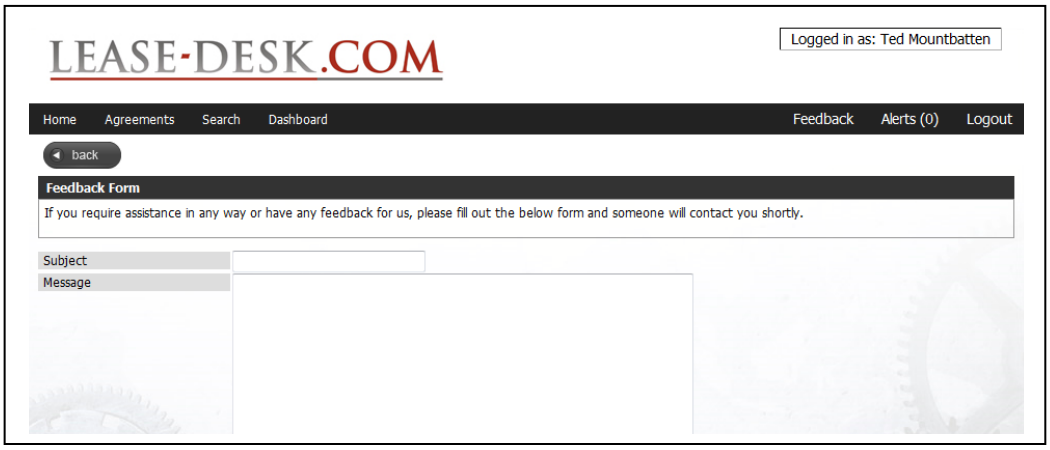
2. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



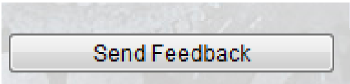
9. Feedback:

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

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

10. Contact Details:

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

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

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