Normal 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 '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;

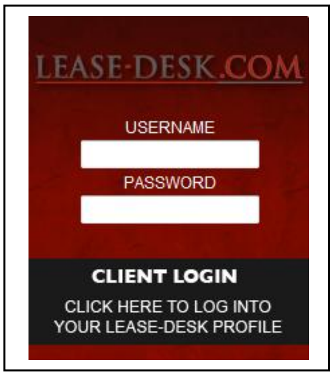
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.

- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.

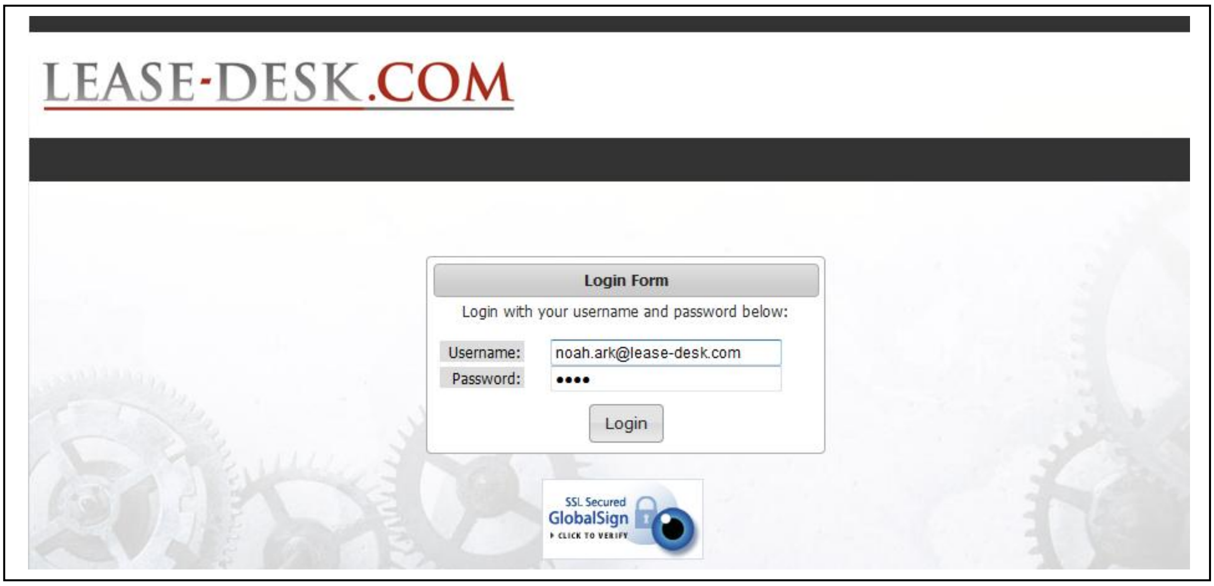
- **Reader/Writer:** You can view the live or pending agreement information for the teams that you are in and also add agreement information to the groups that you are in.

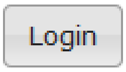
2. Logging into Lease-Desk.com:

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.

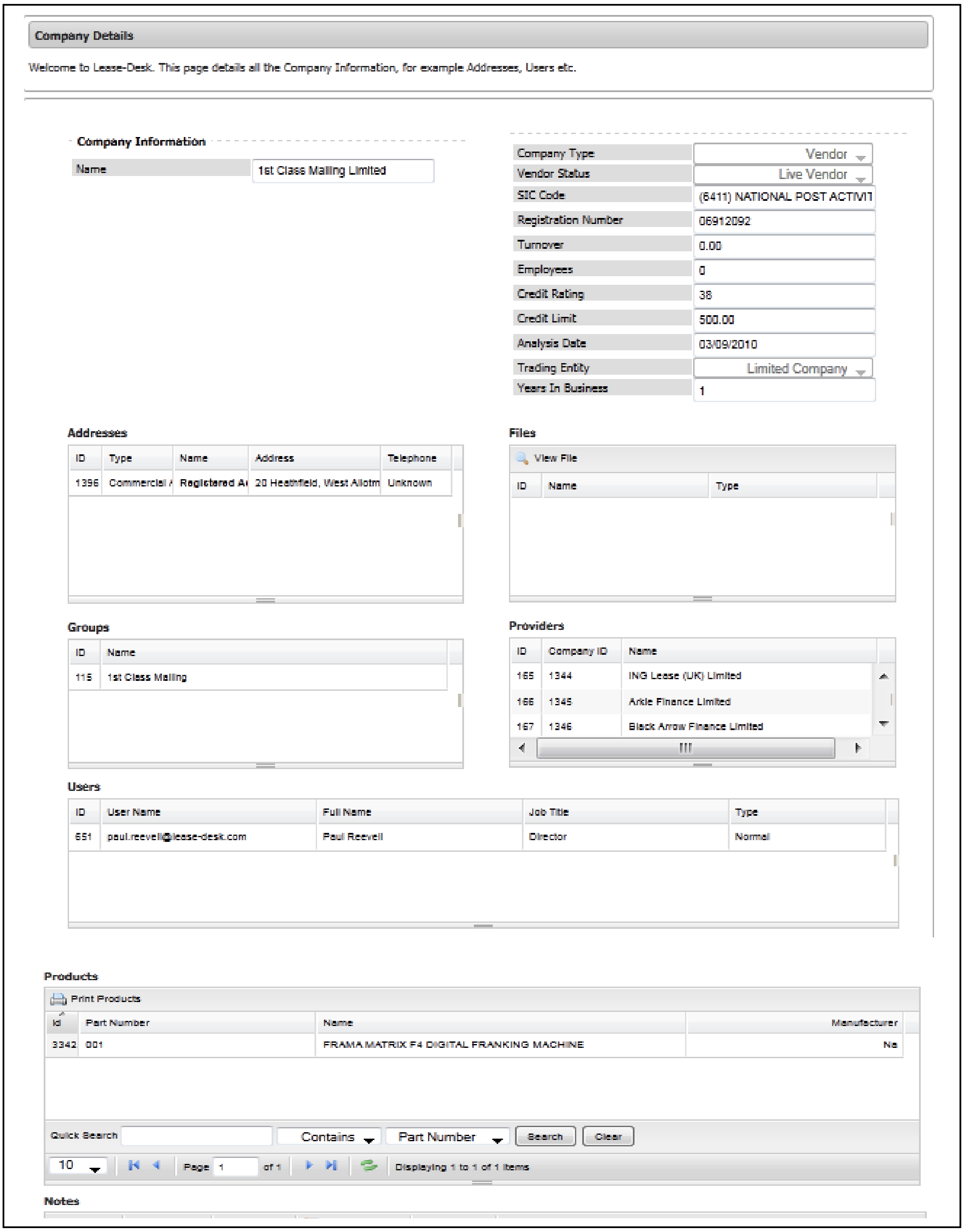


3. Enter your details and click on 

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

3. Home Screen: Adding, & Viewing

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.

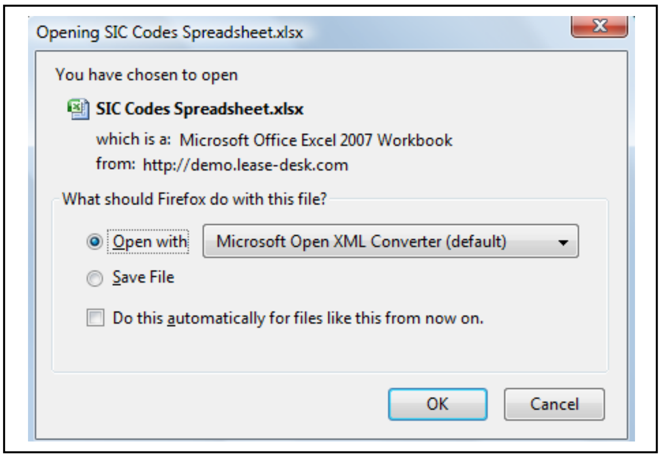
3.1. Viewing Files:

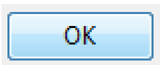
Please Note: You will need Adobe Reader installed for Adding and Viewing Files.

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

2. Click 

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



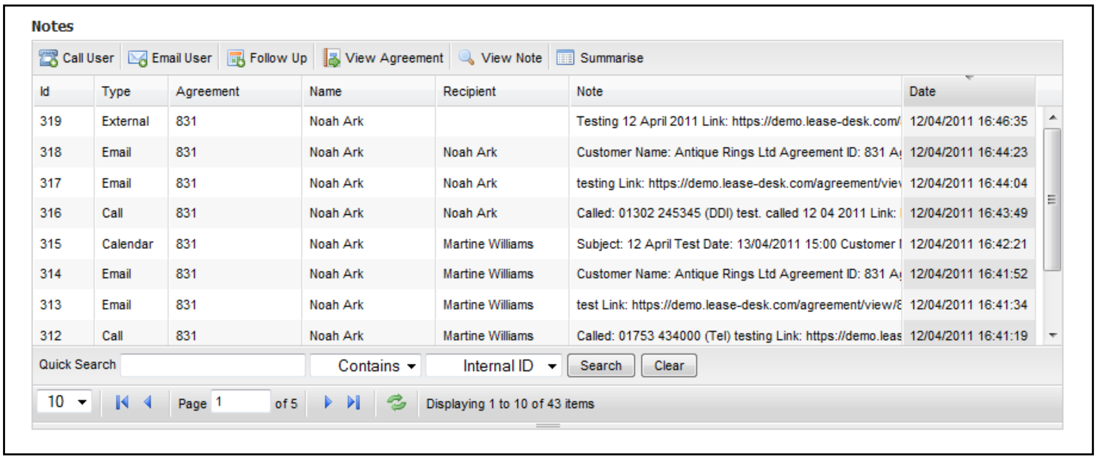
4. Click 

to view the file.

3.2. Adding Call, Email and Follow up Notes:

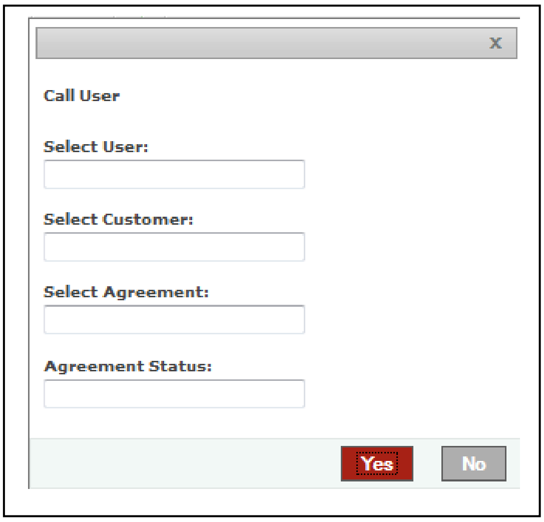
From the homepage, you have the ability to create a call, email or set a follow up note against a user and agreement.

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



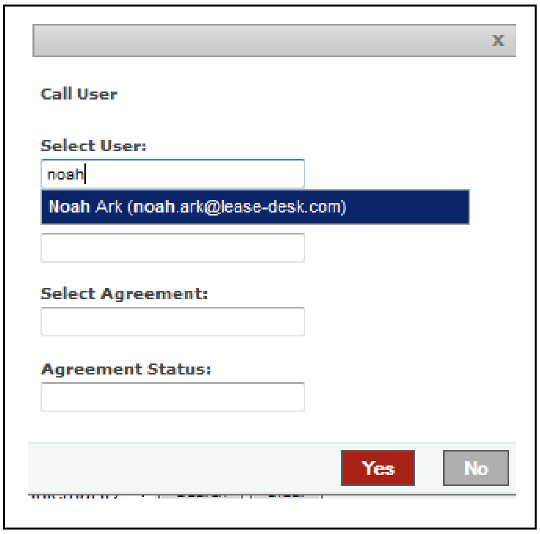
2. Next, select the required action from the options below;

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

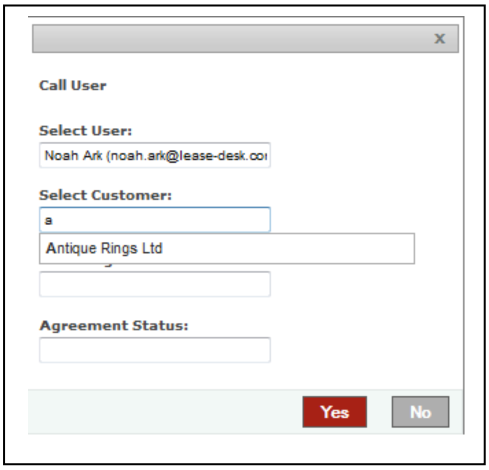


4. Add the required user name from your company in the ‘Select User’ box as per below;

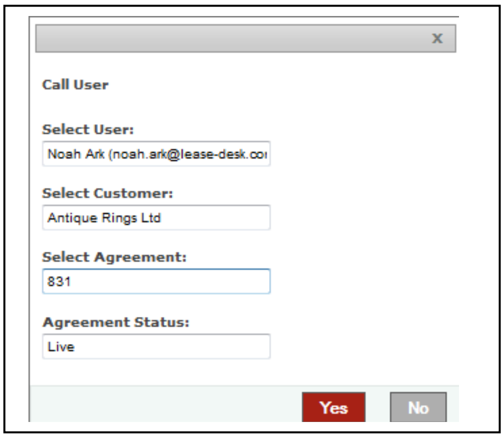
Note: This will be dependent on the individual groups that you have access to and the role type within the group, as you will only be able to see the information you have the rights to view.



5. Next, type in the customer name 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 below;

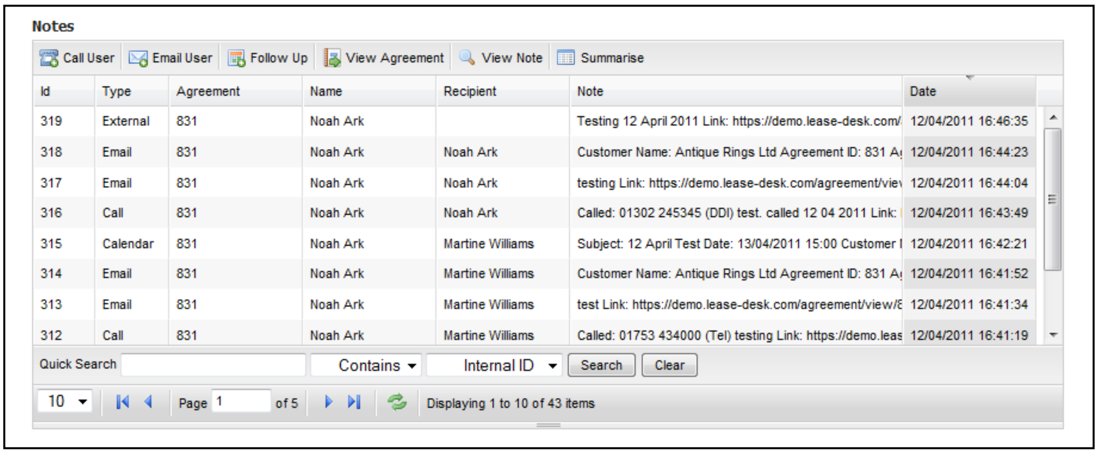


7. Click ‘Yes’ to add a note or ‘No’ to cancel.

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.

3.3. Viewing Agreement information:

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



Notes

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

Id	Type	Agreement	Name	Recipient	Note	Date
319	External	831	Noah Ark		Testing 12 April 2011 Link: https://demo.lease-desk.com/	12/04/2011 16:46:35
318	Email	831	Noah Ark	Noah Ark	Customer Name: Antique Rings Ltd Agreement ID: 831 A	12/04/2011 16:44:23
317	Email	831	Noah Ark	Noah Ark	testing Link: https://demo.lease-desk.com/agreement/vie	12/04/2011 16:44:04
316	Call	831	Noah Ark	Noah Ark	Called: 01302 245345 (DDI) test. called 12 04 2011 Link:	12/04/2011 16:43:49
315	Calendar	831	Noah Ark	Martine Williams	Subject: 12 April Test Date: 13/04/2011 15:00 Customer	12/04/2011 16:42:21
314	Email	831	Noah Ark	Martine Williams	Customer Name: Antique Rings Ltd Agreement ID: 831 A	12/04/2011 16:41:52
313	Email	831	Noah Ark	Martine Williams	test Link: https://demo.lease-desk.com/agreement/view/8	12/04/2011 16:41:34
312	Call	831	Noah Ark	Martine Williams	Called: 01753 434000 (Tel) testing Link: https://demo.leas	12/04/2011 16:41:19

Quick Search | Contains | Internal ID | Search | Clear

10 | Page 1 of 5 | Displaying 1 to 10 of 43 items

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.

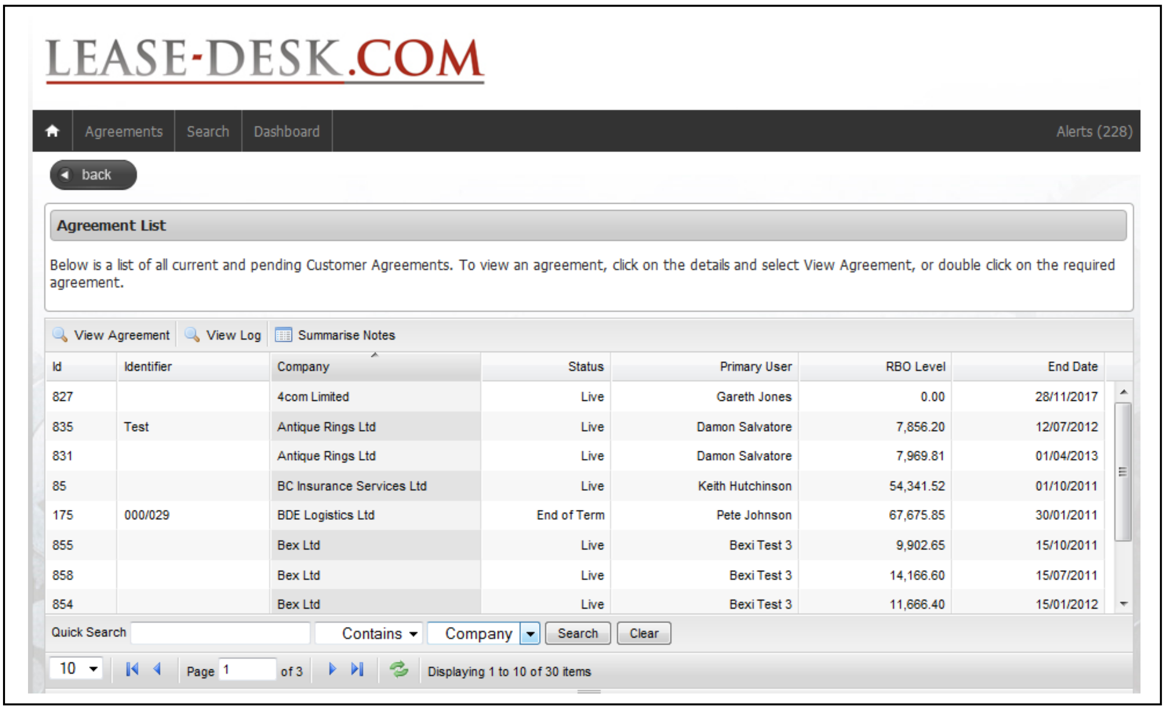
Summarise: Displays the full summary of notes within this table.

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 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 or double click with your mouse on the agreement required.

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

(This is indicated on the following page).

Customer Information:

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

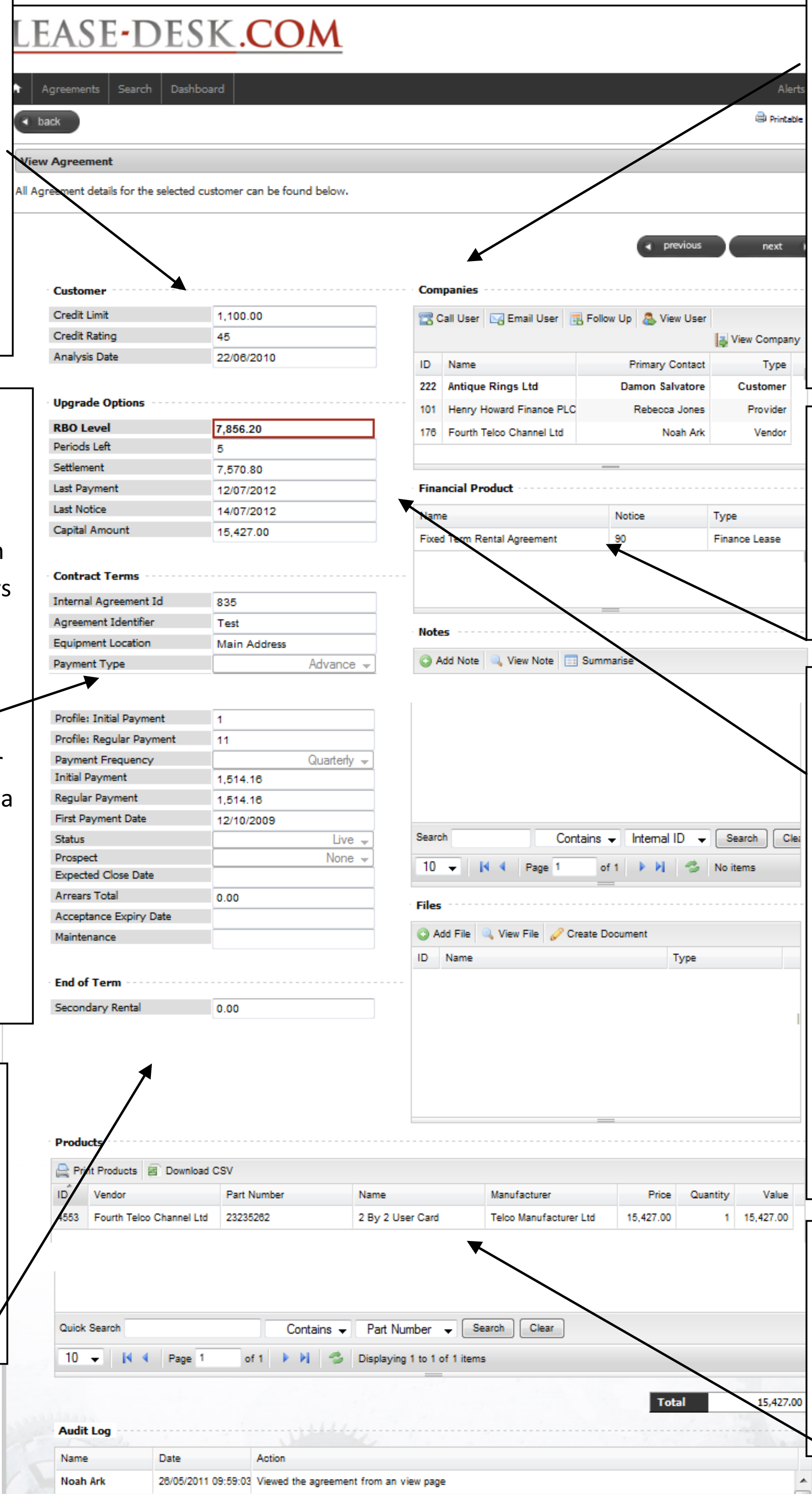
Contract Terms:

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

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

End of Term:

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



Companies Information:

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

Financial Product Information:

This details the Financial Product information

Upgrade Options:

The RBO (Repeat Business Opportunity) levels (indicated in red), indicates how much a customer could spend on technology refresh. **Note this is only available on Live deals.**

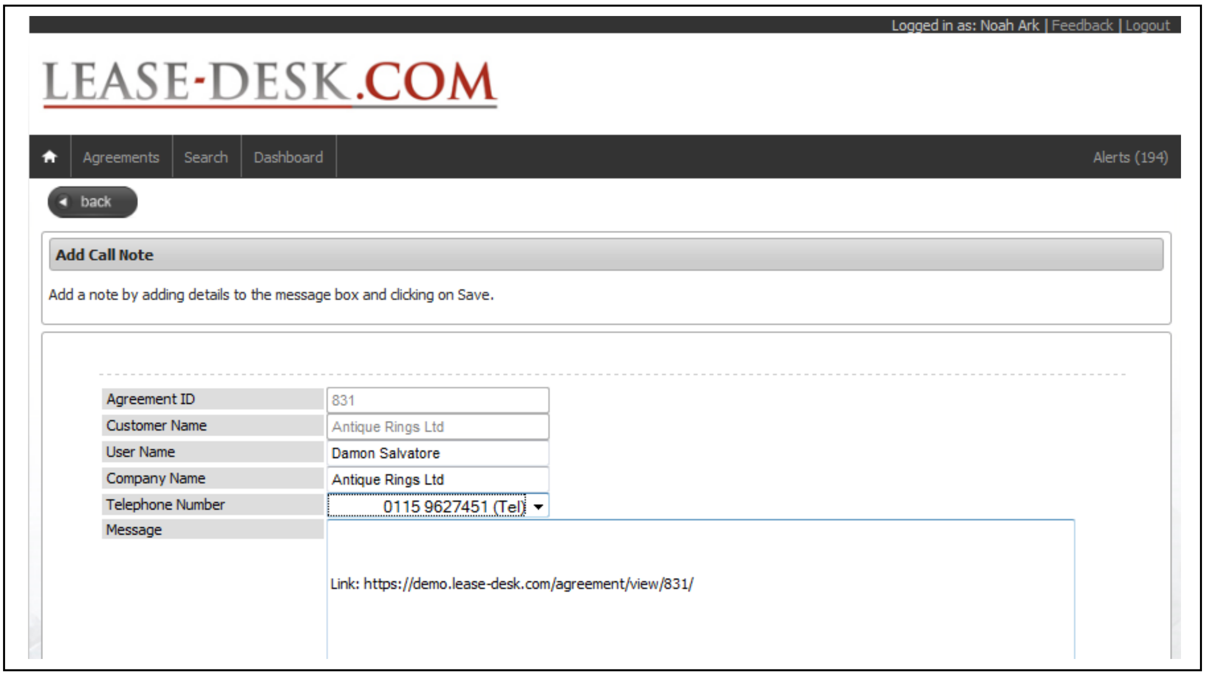
Product Information:

This lists the Product (s) within the agreement.

4.1.1 Calling or Emailing a Primary Contact:

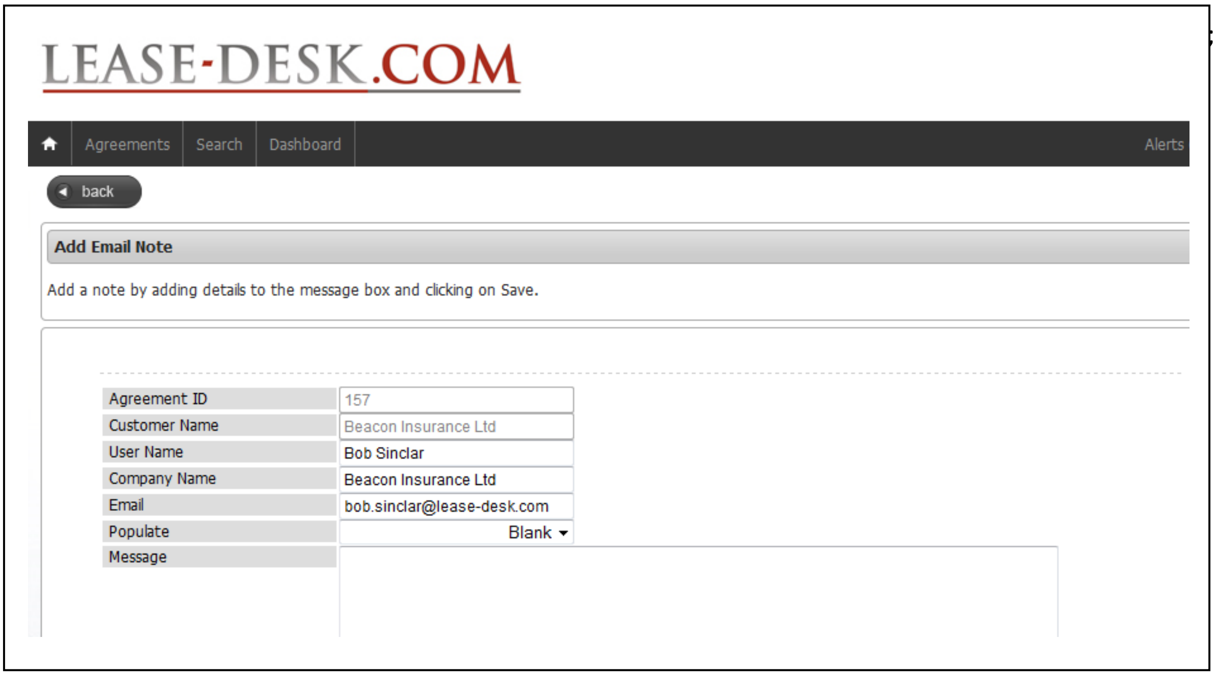
1. Within the Companies table, highlight the chosen user and then click on the required option;

2. If you have selected the ‘Call User’ option, you will then be presented with the following screen;
3. Select the required telephone number from the drop down list.



4. Complete the details and click

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

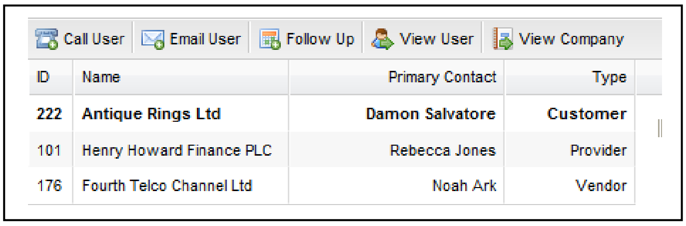


7. Select either ‘Blank’ or ‘Agreement Details’ from the ‘Populate’ dropdown list.

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

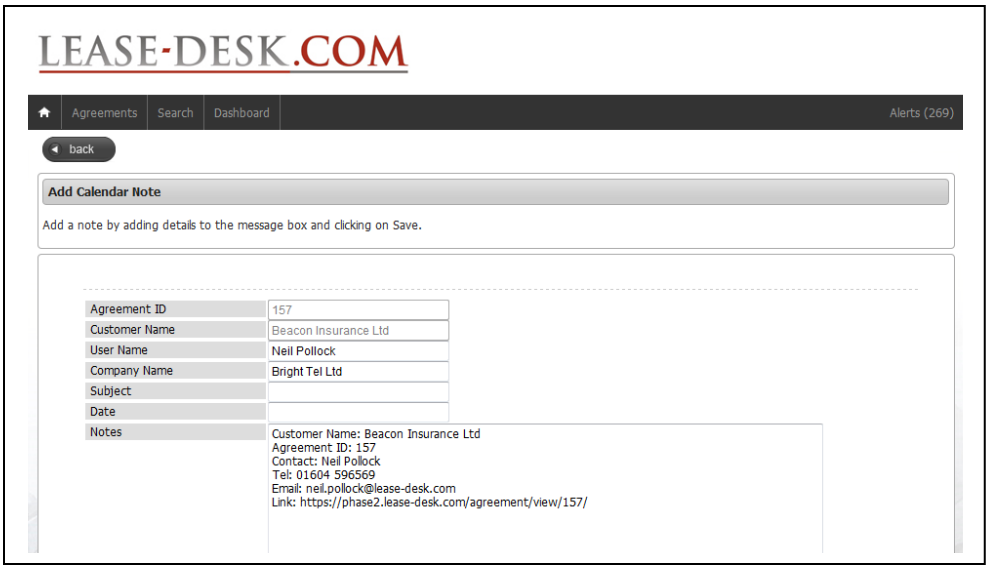
4.1.2 Creating Follow Ups:

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



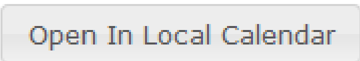
2. Click on 

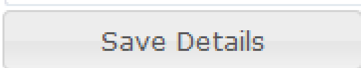
3. You will then be presented with the following screen;



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

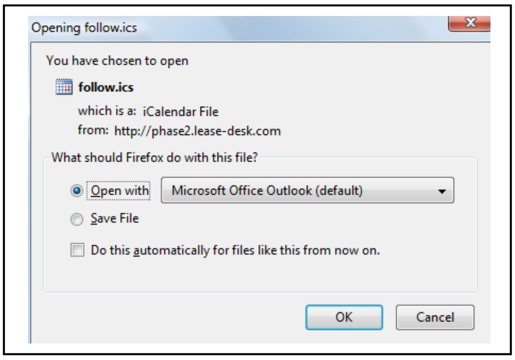
5. Set the time and then date for the follow up and then enter any other details into the 'notes' box.

6. Click 

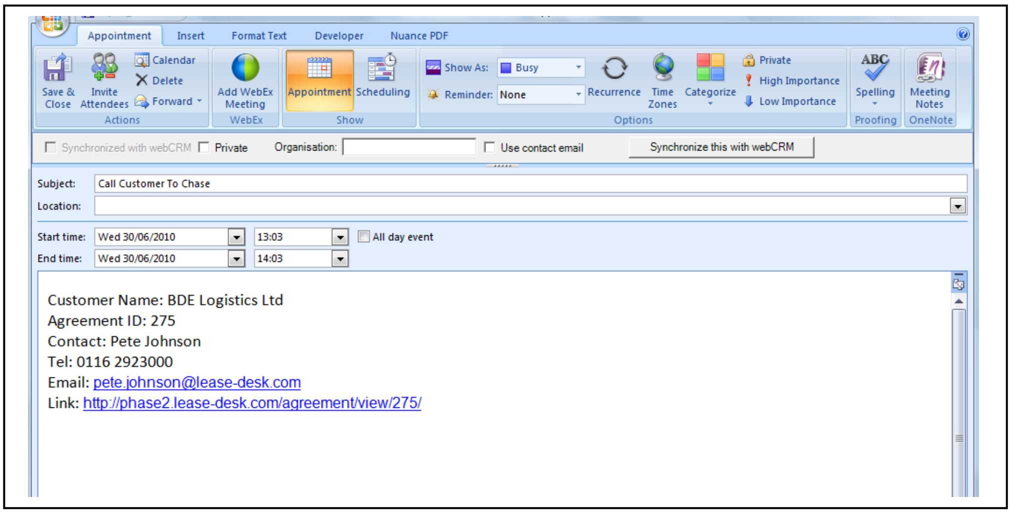
to open up your email or 

to save the information added.

7. When you click on '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.

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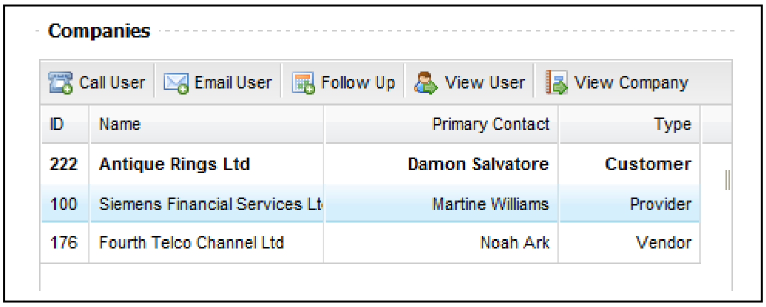


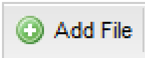
2. Click on either View User or View Company from the top tool bar.

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 Viewing a File:

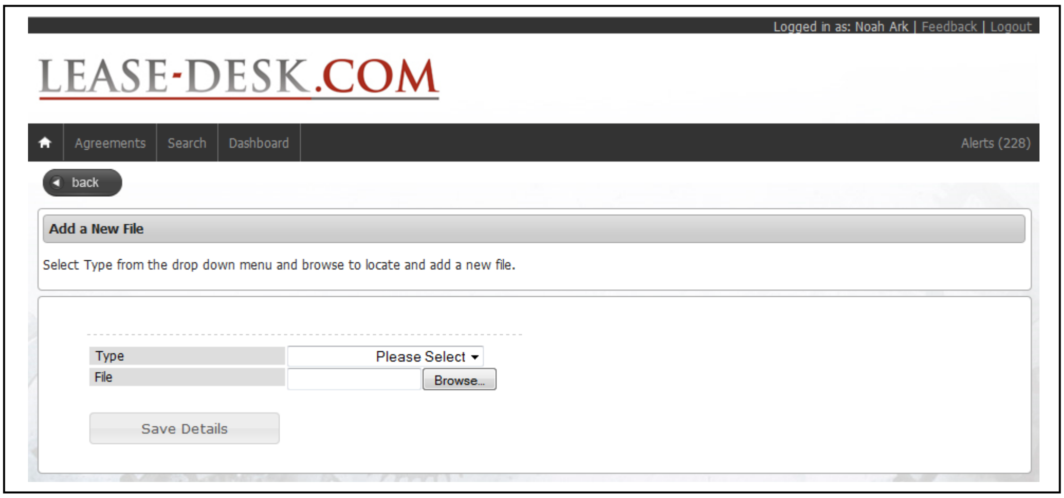
1. To View a File, follow chapter **3.1. Viewing Files**

4.1.5. Adding a File:

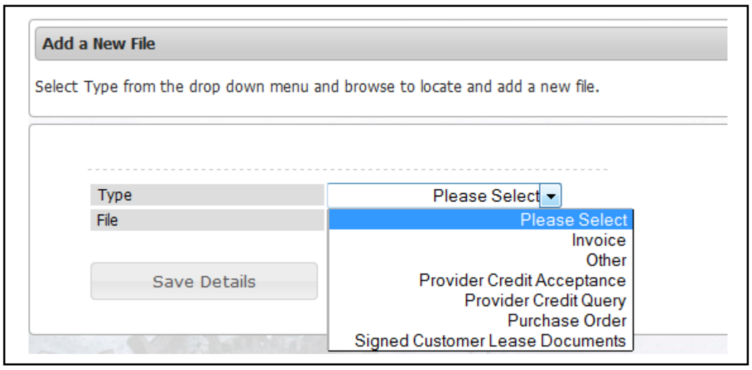
1. To add a File to an agreement, click on 

within the files table.

2. You will then be taken to the 'Add a file' screen as per below;

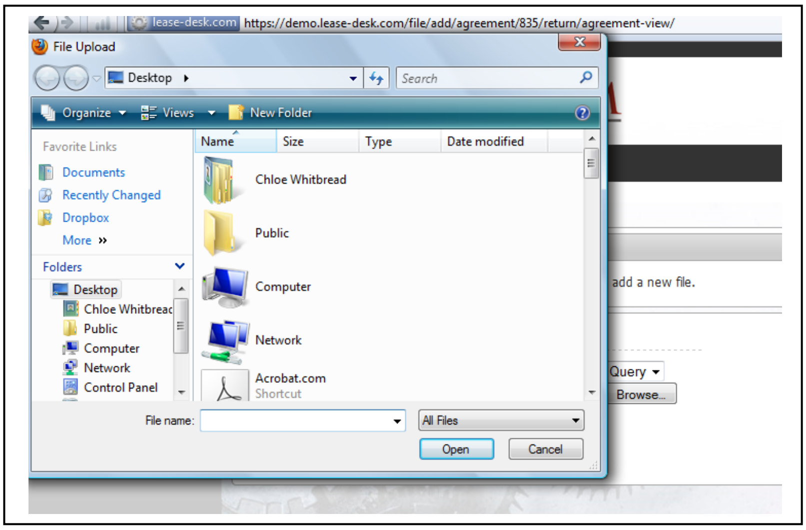


3. Select the type from the drop down menu, as per below;



4. Then click in the 'browse' box to search for the saved file on your computer.

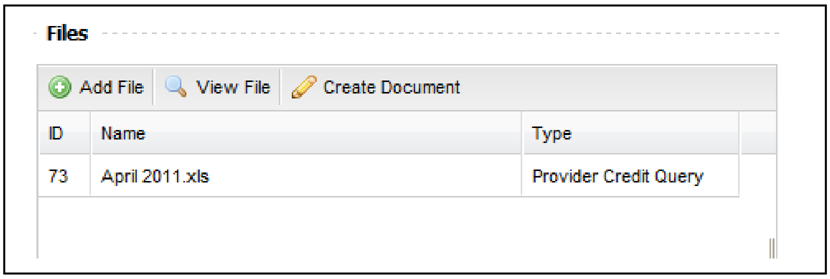
5. You will then be presented with the following pop up;



6. Search for the saved file and then click on 'Open'.

7. Then click on 

8. Your file will then be saved within the 'Files' section of the agreement, as indicated below;

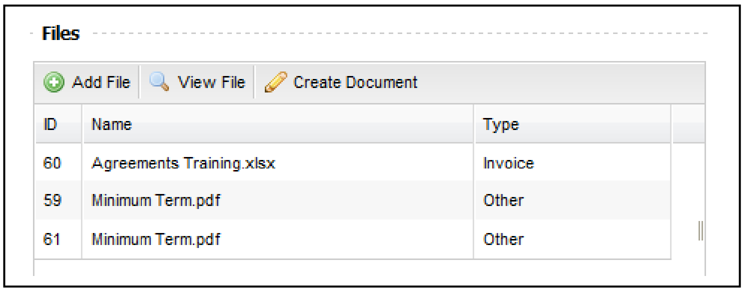


ID	Name	Type
73	April 2011.xls	Provider Credit Query

4.1.6 Creating a Document:

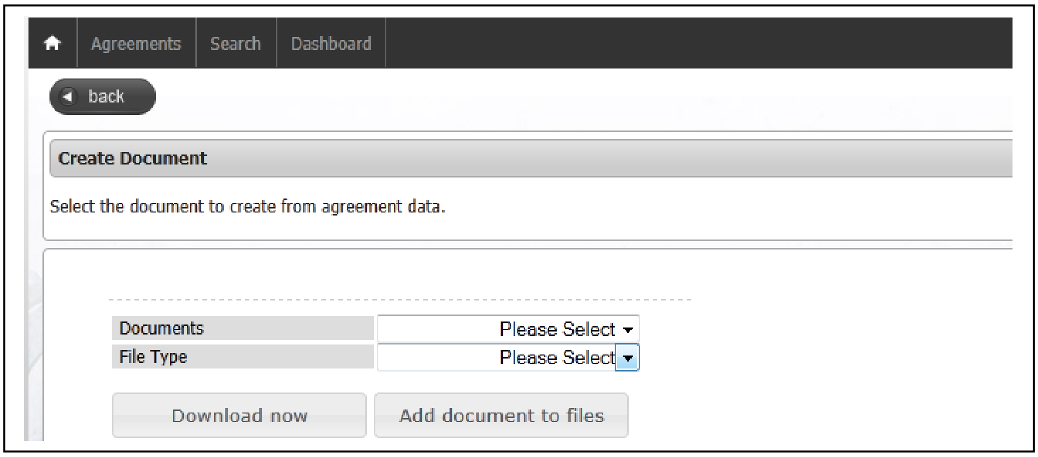
1. To create a document for an agreement, go to the 'Files' section on the agreement, as indicated below;

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.

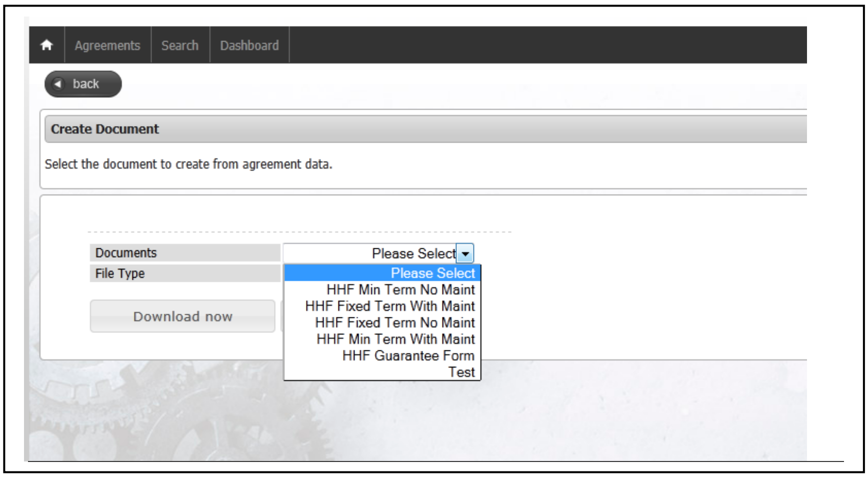


2. Click on 

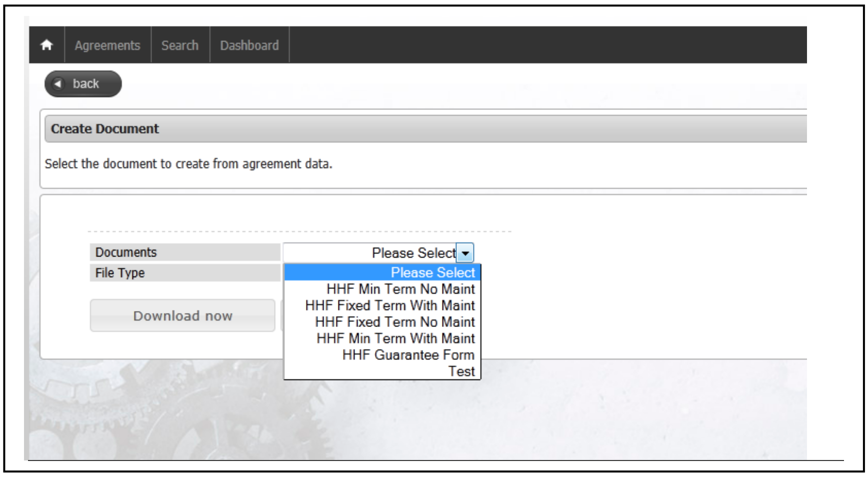
3. You will then be taken to the 'Create a document' page as indicated below;

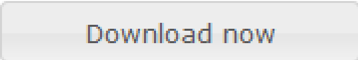


4. Select the required document from the drop down menu;



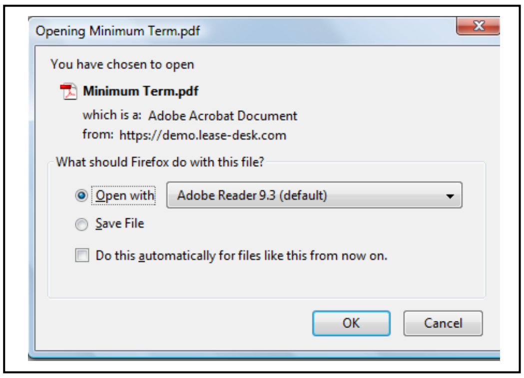
5. Choose the File Type from the Second drop down menu,

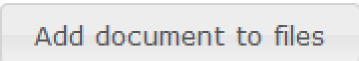


6. Select 

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

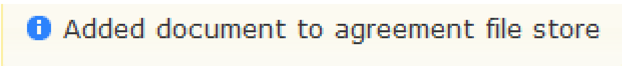
6a. Click on 'OK' to open into a PDF file, or 'Cancel' to cancel the action.



6b. Click on 

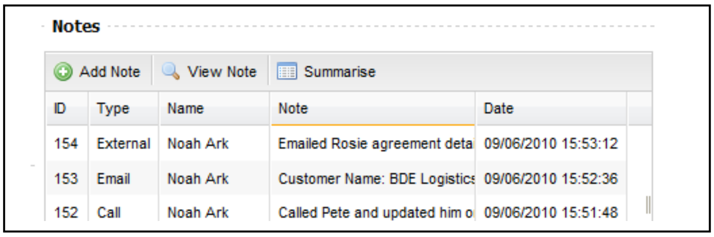
to save the auto completed PDF document within the files section of the agreement.

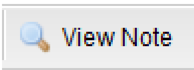
Note: If you select this option you will be presented with the following confirmation message;



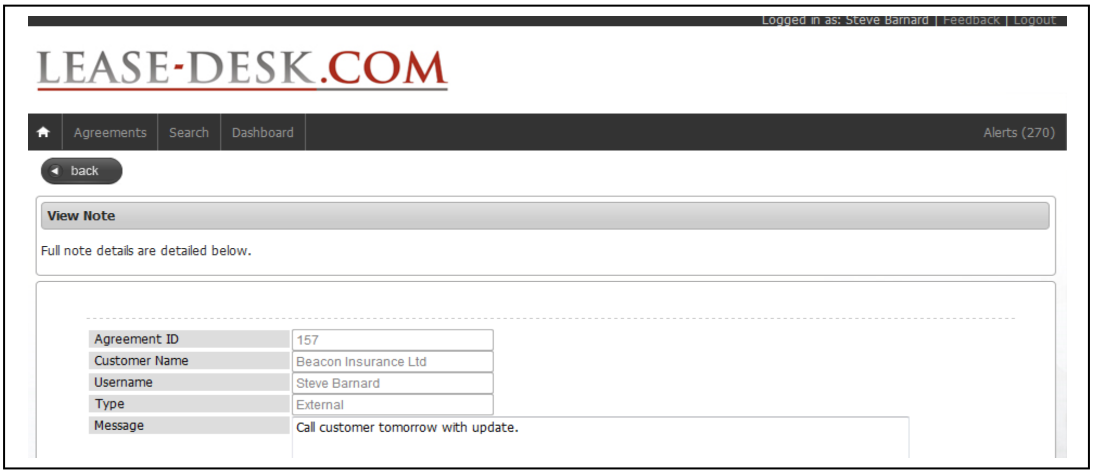
4.1.7 Viewing a Note:

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



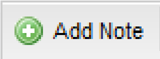
2. Highlight the note required and Click 

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

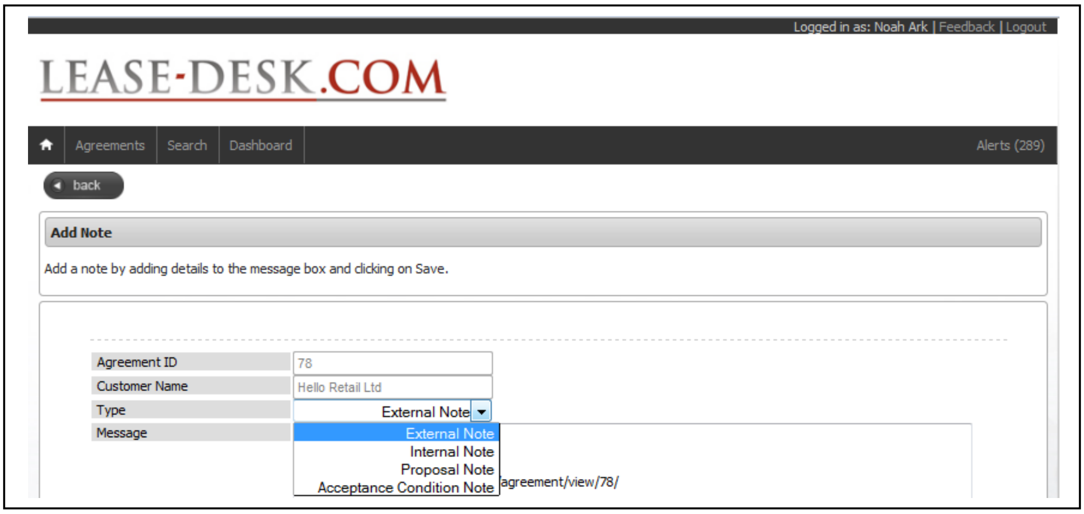


4.1.8 Adding a Note:

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

2. Click 

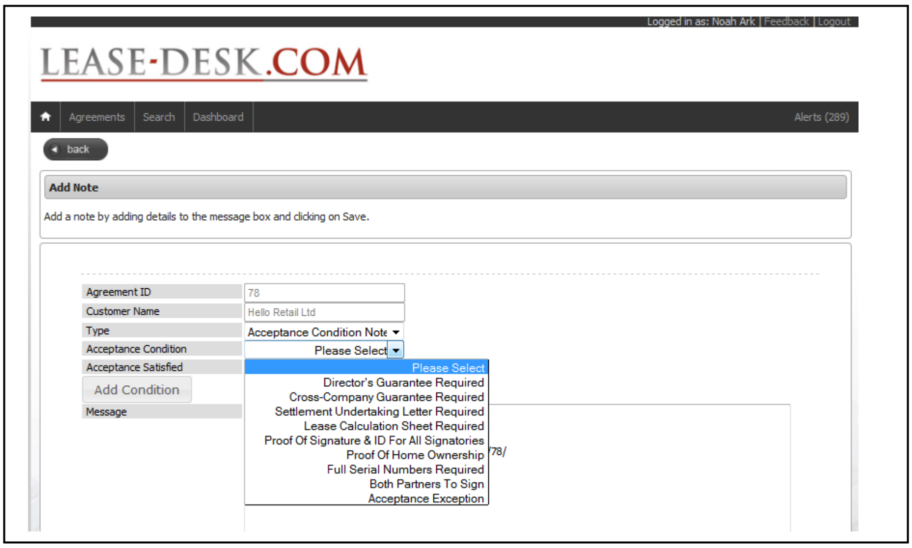
3. You will then be presented with the following 'Add Note' screen;



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 Save Details

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

4.1.9 Summarising Notes:

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

2. You will then be presented with the following View Summarised Notes screen, as per below;

View Summarised Notes

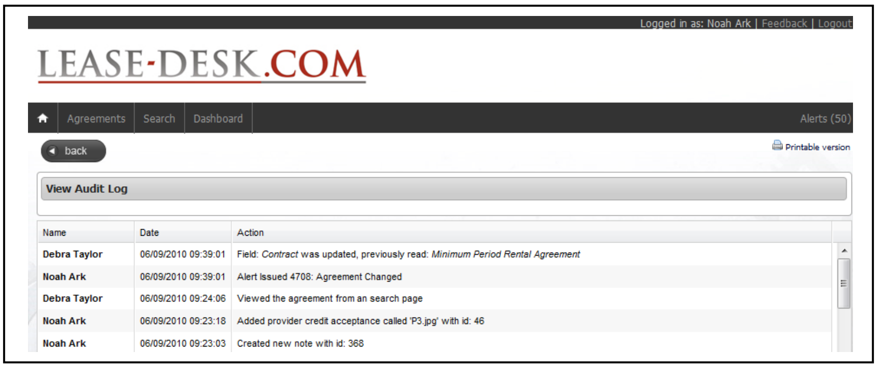
Full agreement note details are detailed below.

ID	Type	Name	Recipient	Note	Date	AC Satisfied
691	Acceptance C	Debra Taylor		Acceptance Condition: Both Partners To Sign Acceptance Condition: Lease Calculation Sheet Required Acceptance Condition: Director's Guarantee Required	30/09/2011 09:46:19	Yes

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;

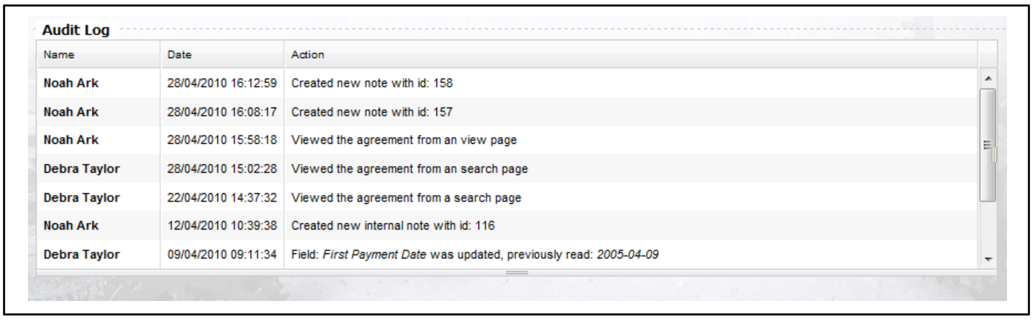


Name	Date	Action
Debra Taylor	06/09/2010 09:39:01	Field: *Contract* was updated, previously read: *Minimum Period Rental Agreement*
Noah Ark	06/09/2010 09:39:01	Alert Issued 4708: Agreement Changed
Debra Taylor	06/09/2010 09:24:06	Viewed the agreement from an search page
Noah Ark	06/09/2010 09:23:18	Added provider credit acceptance called 'P3.jpg' with id: 46
Noah Ark	06/09/2010 09:23:03	Created new note with id: 368

or

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 action against the selected Agreement, as detailed below;



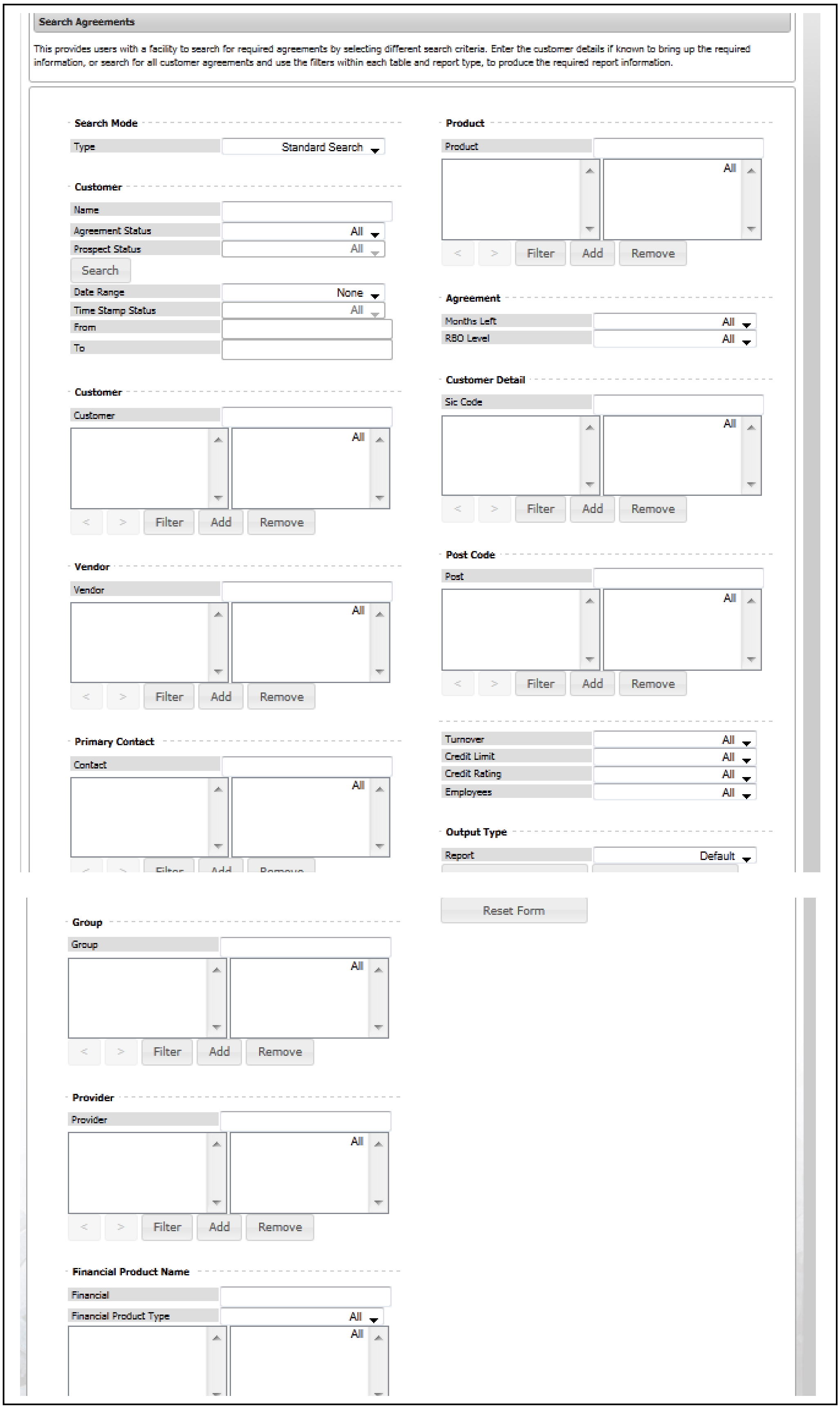
Name	Date	Action
Noah Ark	28/04/2010 16:12:59	Created new note with id: 158
Noah Ark	28/04/2010 16:08:17	Created new note with id: 157
Noah Ark	28/04/2010 15:58:18	Viewed the agreement from an view page
Debra Taylor	28/04/2010 15:02:28	Viewed the agreement from an search page
Debra Taylor	22/04/2010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

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

5.0 Search:

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

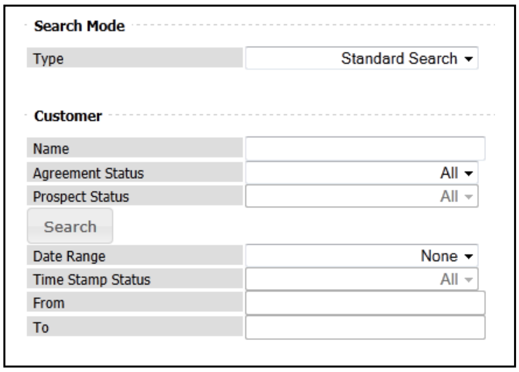
1. The Search Agreements screen, allows you to search for all agreement information that you have access to (determined by role type), by selecting the different filters required.

2. To bring up the information in any of the tables, click Filter and then Add to select it.

3. To remove any data selected, click Remove

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.

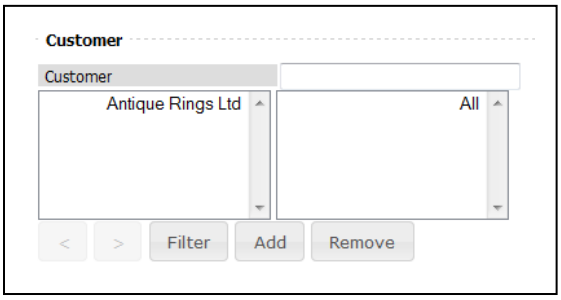


2. Complete the following details if required/known or keep as All;

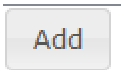
- Agreement Status
- Prospect Status (if previous Status is set to Prospect)
- Date Range (if applicable). Note you can search for different options within this menu such as 'Expected Close Date, Last Payment Date etc'.
- Time Stamp Status (if Prospect Time Stamp has been selected in the Date Range box)

3. Click Search

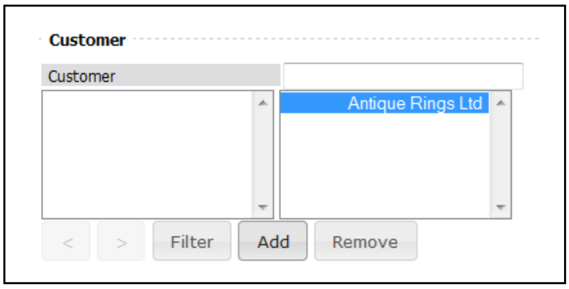
4. The company agreement information relating to the inputted information will then be displayed in each of the filter tables, as indicated in the example below;



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

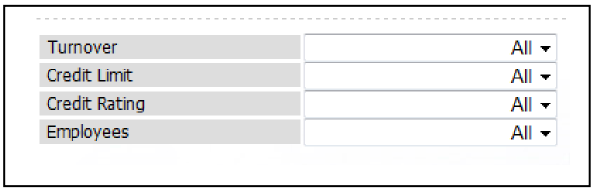


6. The data will then be moved into the second box as indicated below;

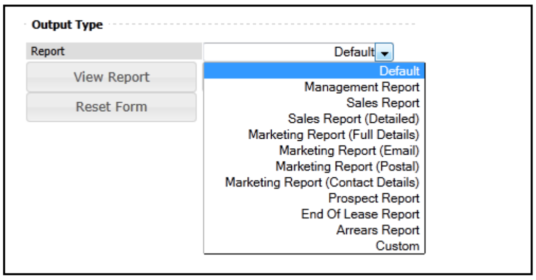


7. Carry on with each table required, following the previous step.

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.

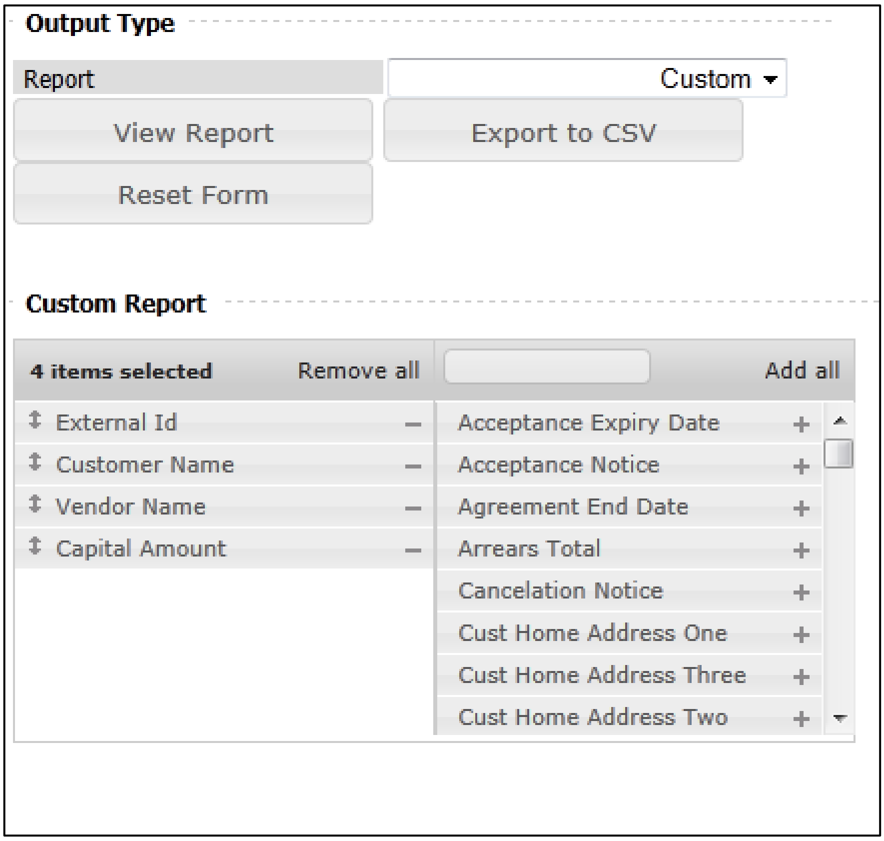
8. **Marketing Report (Contact Details):** As above, minus address but with Phone Number.

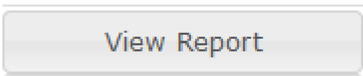
9. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

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.

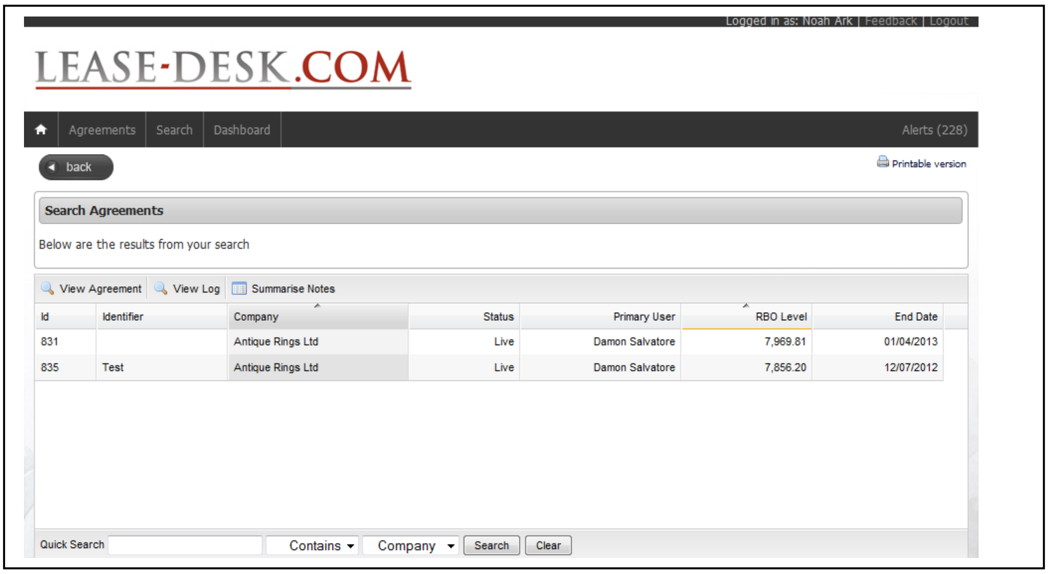
11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

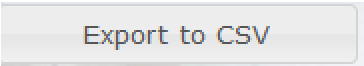
12. **Custom Report:** This report allows you to choose the information that you wish to bring through onto a report. When you select this option the following table will appear beneath the Output Type section of the screen. Here you can add/remove the information that you would like to view:



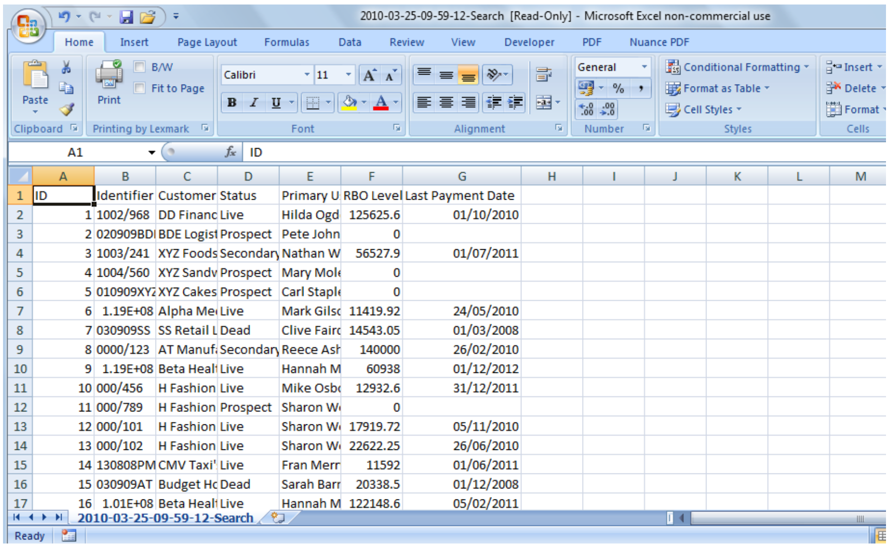
10. Once the report type has been selected, click on 

and you will be presented with the data in the following format;



or 

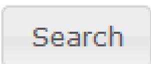
to view in CSV format as per below;



ID	Identifier	Customer	Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ	Live	Hilda Ogd	125625.6	01/10/2010
2	020909BDI	BDE Logist	Prospect	Pete John	0	
3	1003/241	XYZ Foods	Secondary	Nathan W	56527.9	01/07/2011
4	1004/560	XYZ Sandv	Prospect	Mary Mole	0	
5	010909XYZ	XYZ Cakes	Prospect	Carl Staple	0	
6	1.19E+08	Alpha Me	Live	Mark Gilsc	11419.92	24/05/2010
7	030909SS	SS Retail L	Dead	Clive Fairc	14543.05	01/03/2008
8	0000/123	AT Manufa	Secondary	Reece Ash	140000	26/02/2010
9	1.19E+08	Beta Healt	Live	Hannah M	60938	01/12/2012
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
14	130808PM	CMV Taxi'	Live	Fran Merr	11592	01/06/2011
15	030909AT	Budget Hc	Dead	Sarah Barr	20338.5	01/12/2008
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'

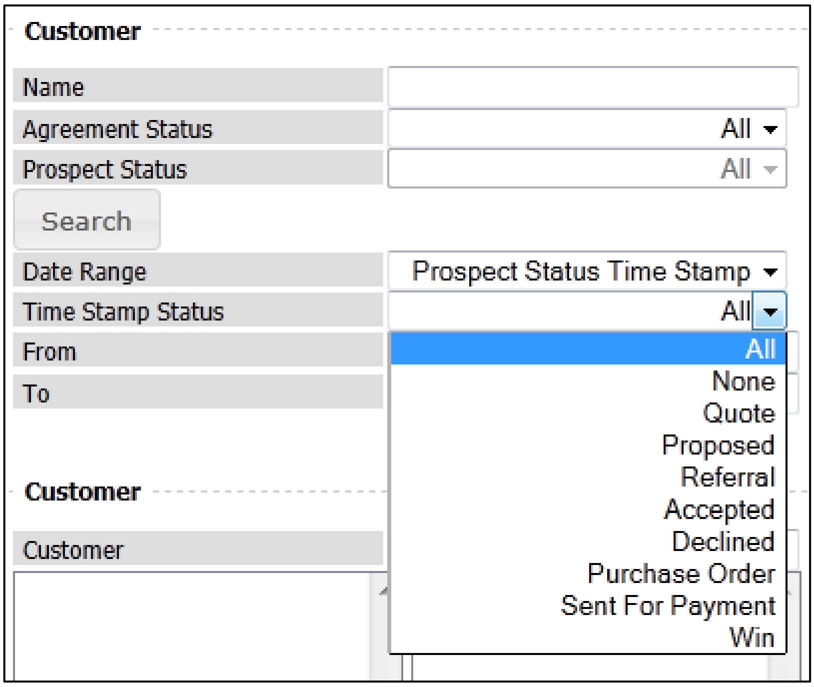
2. Click 

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

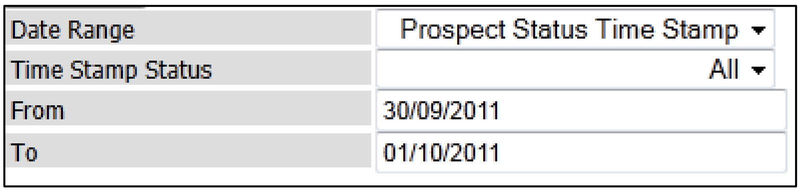
4. Follow the previous step 9 for how to select report type and view data.

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;

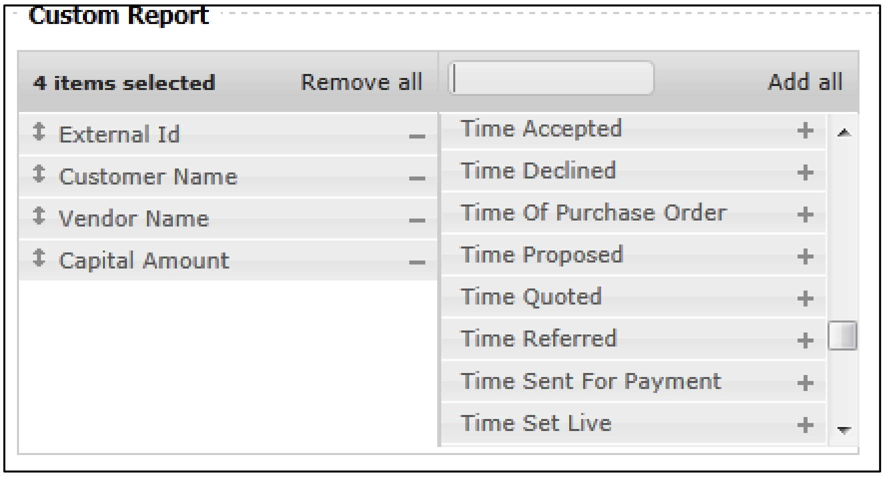


2. Next, specify the date range of the information you wish to bring through. Note if you are searching for a specific day’s worth of information, enter the date you require in the From box and then enter the day after into the To box. This will bring through all of the information for the 24 hours of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



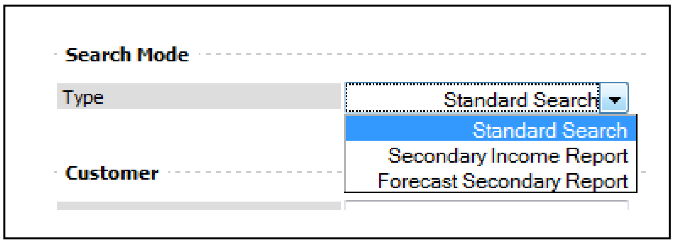
3. Click Search to bring through all of the information on the Search Screen, or select a Report type and View the Report or Export it to CSV.

4. 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:

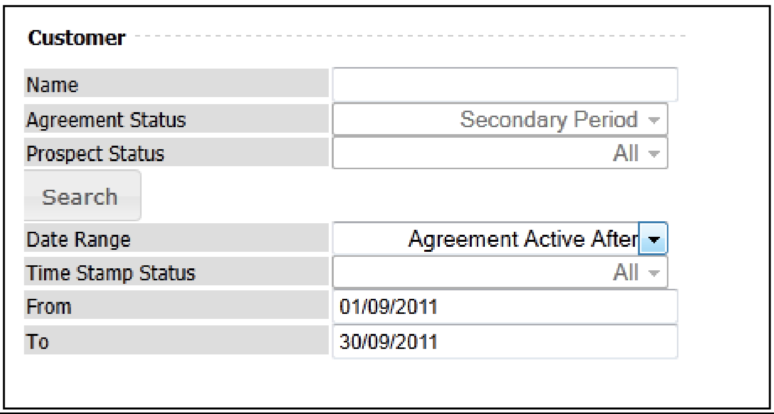
1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;



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’.

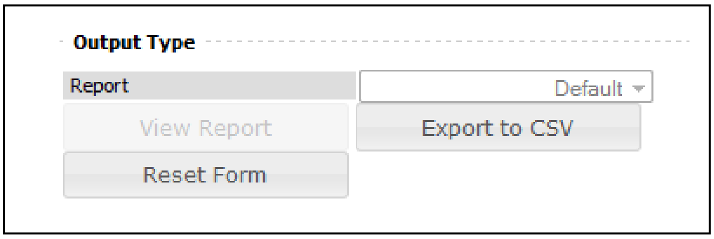
2. Next, select the date range that you wish to search for, as indicated below.



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

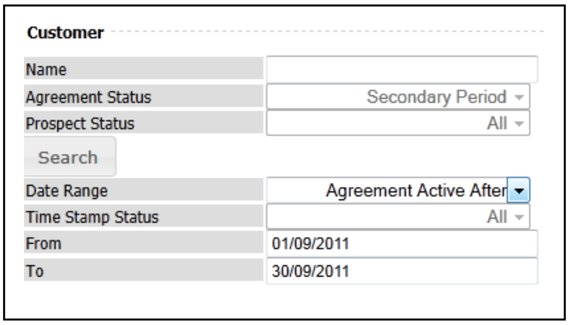
4. Note: This report type is only viewable via CSV format. To view the data, click on

as indicated below;



5.4.2 Forecast Secondary Report

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

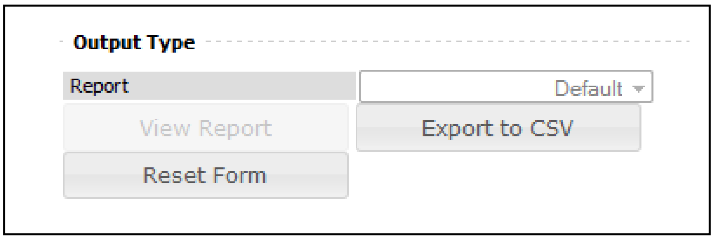


2. Next, select the date range that you wish to search for, as indicated below.

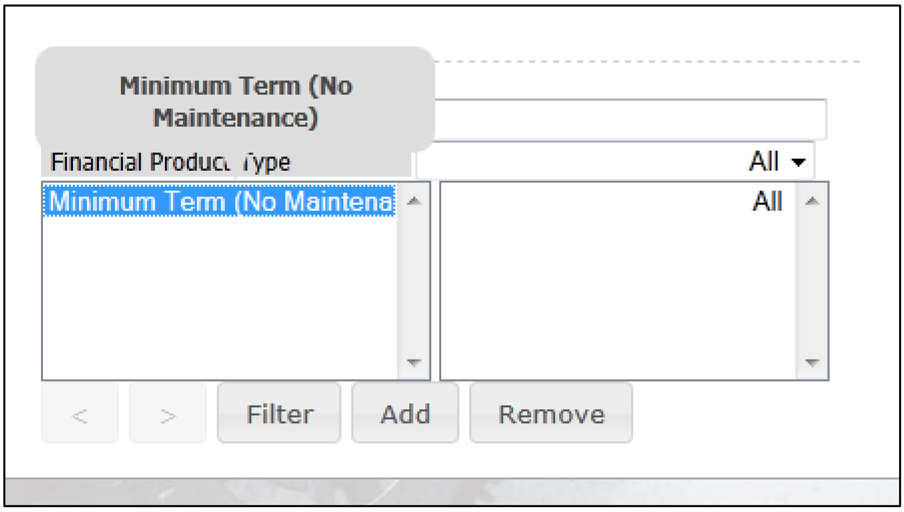
3. Continue to select the relevant criteria required before selecting your report type from the dropdown list.

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

as indicated below;



Note: There is also a Hover Over icon function that is activated when you highlight the information in the Search boxes. This functionality allows you to see the full name of the information highlighted, which may be restricted by the size of the boxes, as per below;

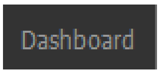


6. Dashboard:

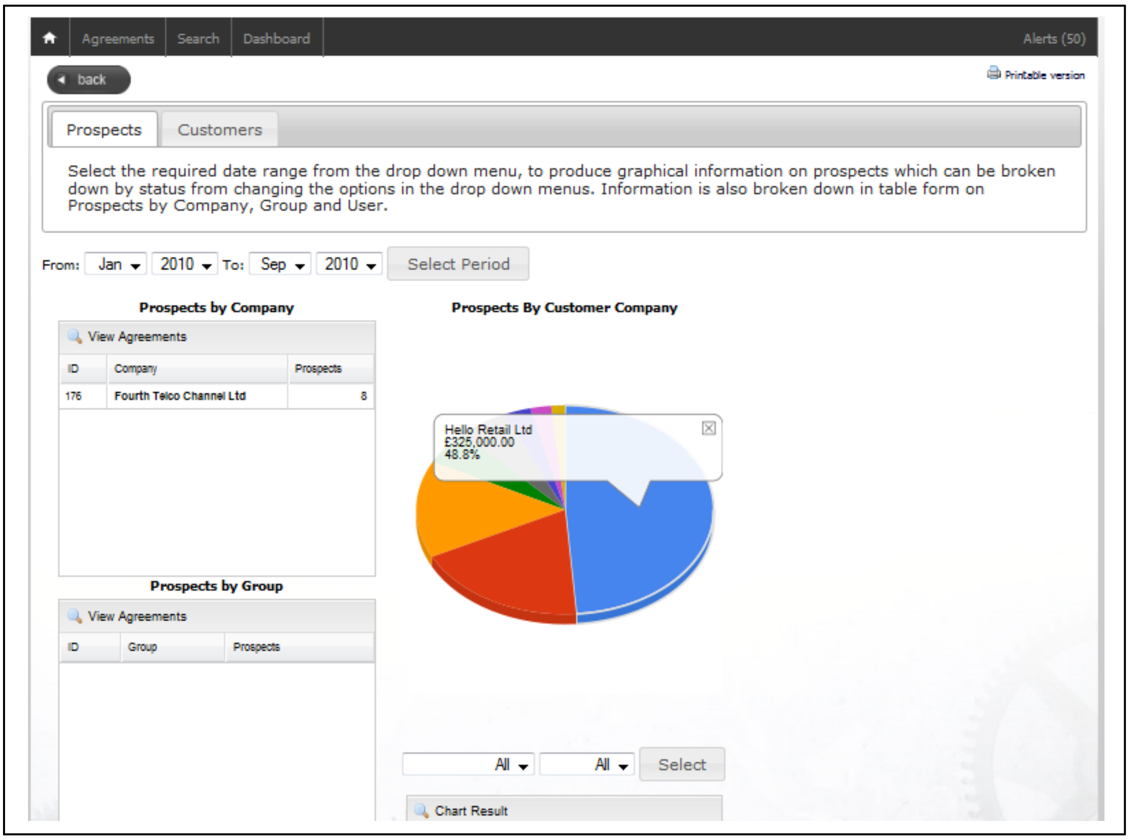
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

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).

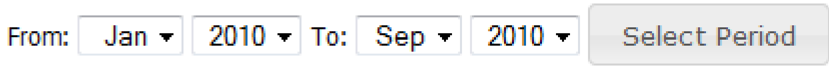
1. Go to  on the main top menu.

2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a default pie chart indicating Prospects by Customer Company, as indicated below;

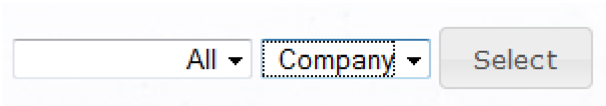


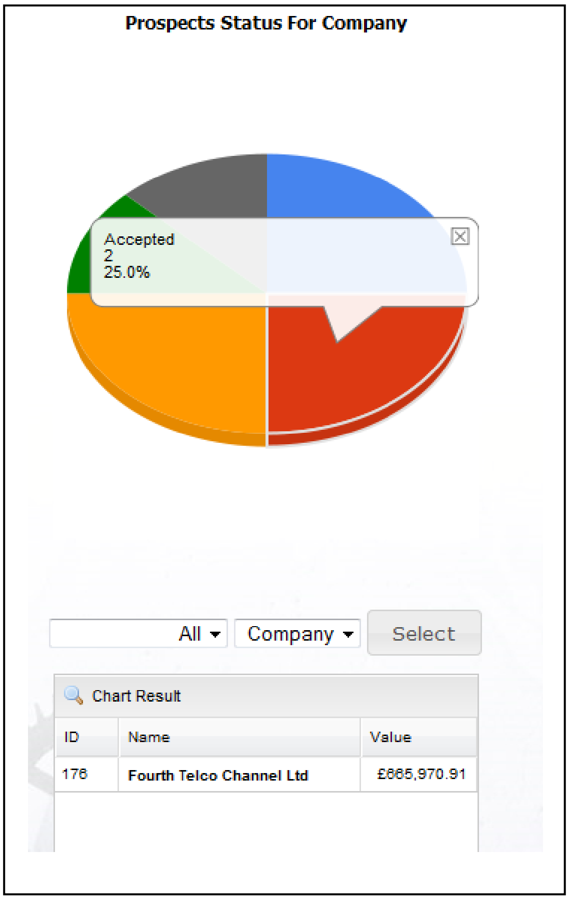
3. From the date range at the top of the page, select the required date and click

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

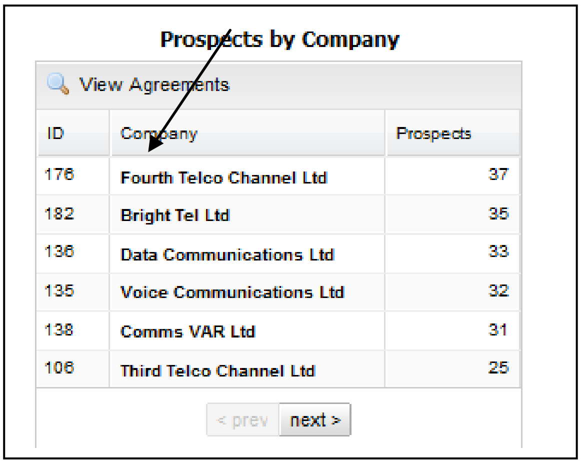


5. Click on 'Select', as indicated below, and the graph will then display all of the Prospect Milestones broken down.





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

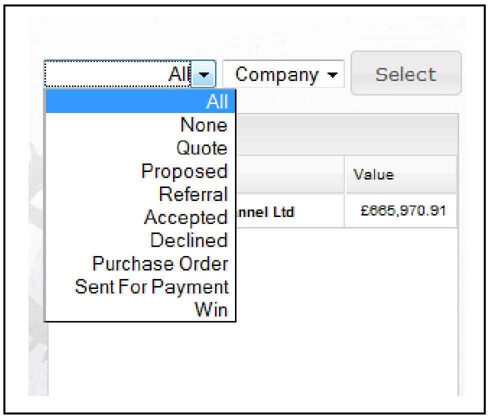


7. Alternatively, double click on the required line.

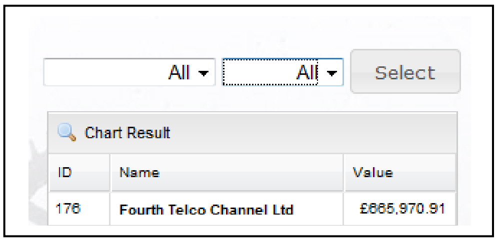
Note: To view any of the segments within the Pie Chart, simply click on the required segment and you will be taken to the agreements associated with the chosen area selected.

6.1.1 Viewing Top Prospect Information in Graphical Format:

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



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



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

Chart Result

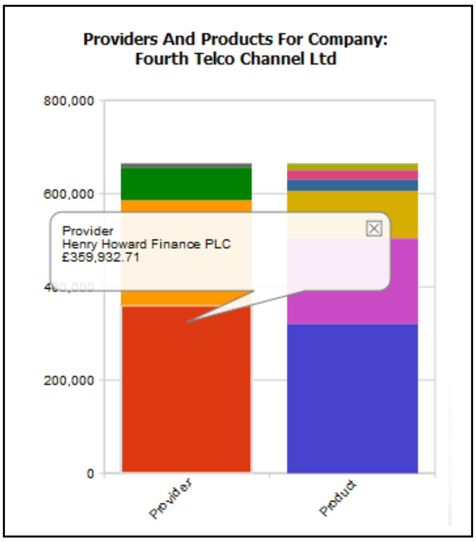
ID	Name	Value
176	Fourth Telco Channel Ltd	£665,970.91

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

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

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.



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

Top Prospects

View Agreement

ID	Name	Value	Provider
78	Hello Retail Ltd	£325,000.00	Henry Howard Financ
79	Budget Hotel Ltd	£124,995.00	Siemens Financial S

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

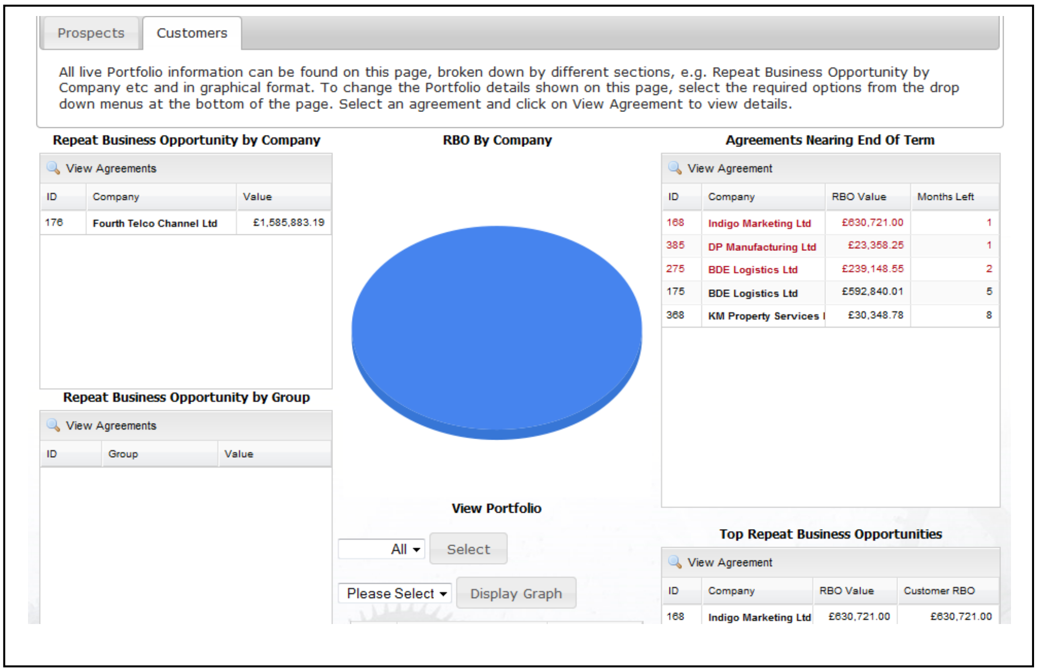
6.2. Customers:

1. Go to 

at the top tab on the left hand side of the Prospects screen within Dashboard.

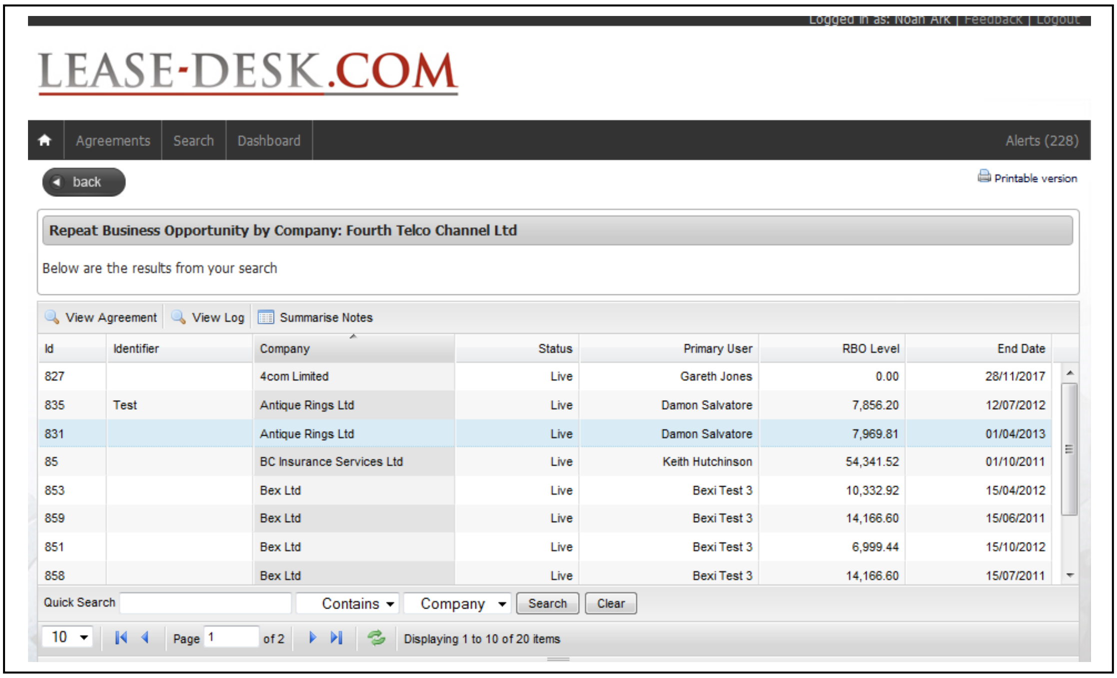
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

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



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

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

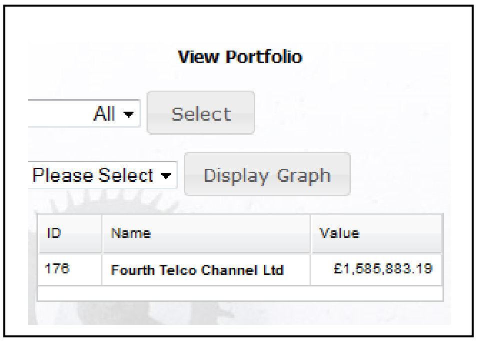


Id	Identifier	Company	Status	Primary User	RBO Level	End Date
827		4com Limited	Live	Gareth Jones	0.00	28/11/2017
835	Test	Antique Rings Ltd	Live	Damon Salvatore	7,856.20	12/07/2012
831		Antique Rings Ltd	Live	Damon Salvatore	7,969.81	01/04/2013
85		BC Insurance Services Ltd	Live	Keith Hutchinson	54,341.52	01/10/2011
853		Bex Ltd	Live	Bexi Test 3	10,332.92	15/04/2012
859		Bex Ltd	Live	Bexi Test 3	14,166.60	15/06/2011
851		Bex Ltd	Live	Bexi Test 3	6,999.44	15/10/2012
858		Bex Ltd	Live	Bexi Test 3	14,166.60	15/07/2011

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

6.2.1 Viewing/Amending Portfolio Information:

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



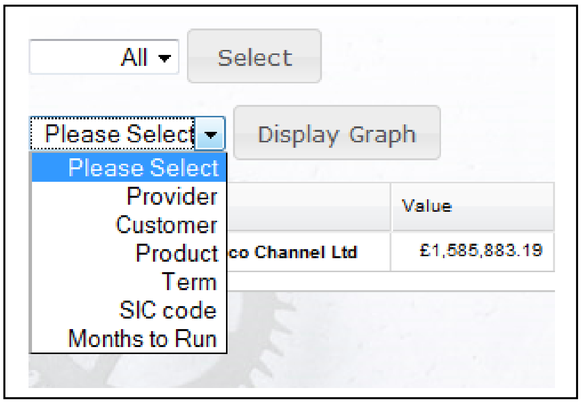
ID	Name	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

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

3. Click 

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

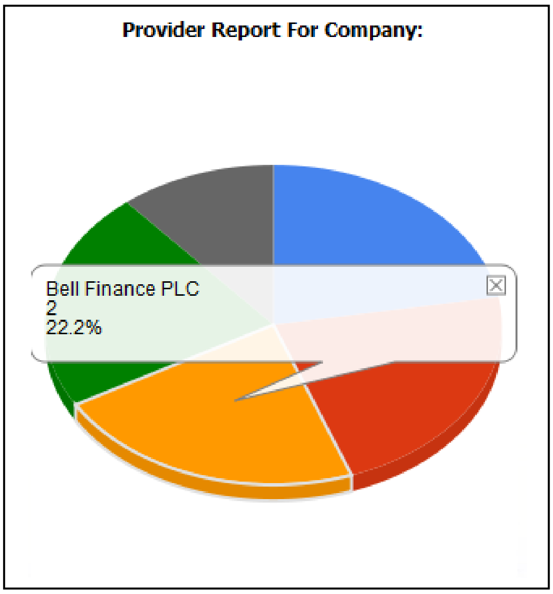
5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click 

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

Note: To view the legend, hover over the graph segments with your mouse. To view the segment information, double click.



7. Alerts:

Part of Lease-Desk.com's functionality is to send automatic email alerts to Vendor users (Normal and Main) and Super Users. As Normal 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. These will appear in your alerts list and also via email (dependant on whether the receive alerts tick box is ticked for you).

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.***

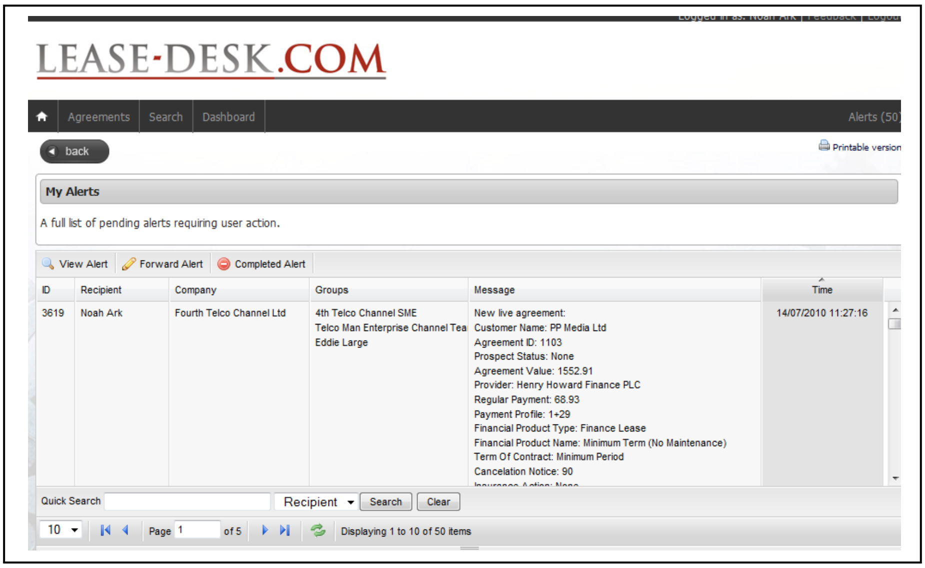
- ***Alerts that are not completed will continue to generate alerts every 3 days during the following week unless the Alert has been 'Completed' on the system.***

- ***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:

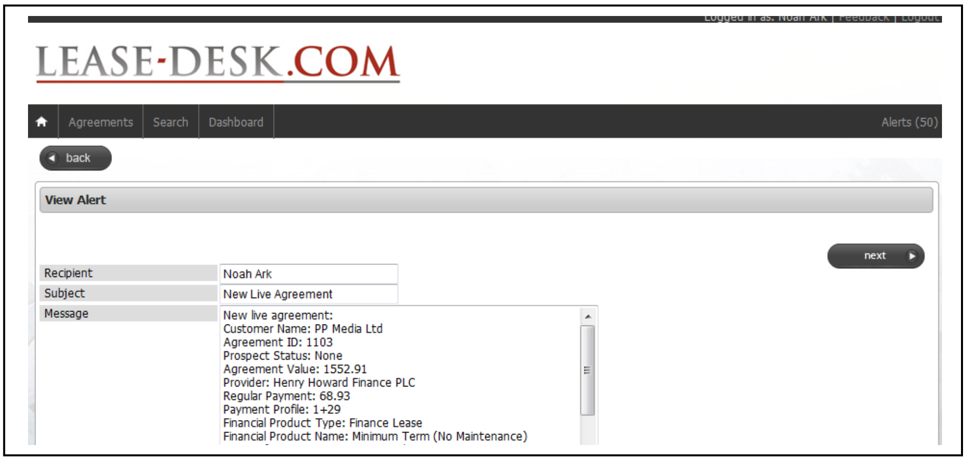
1. To view your individual or team user alerts, select Alerts (50) from the top menu.

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

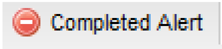


3. To view an alert, highlight the required alert and click View Alert

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



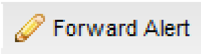
7.2 Completing Alerts:

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

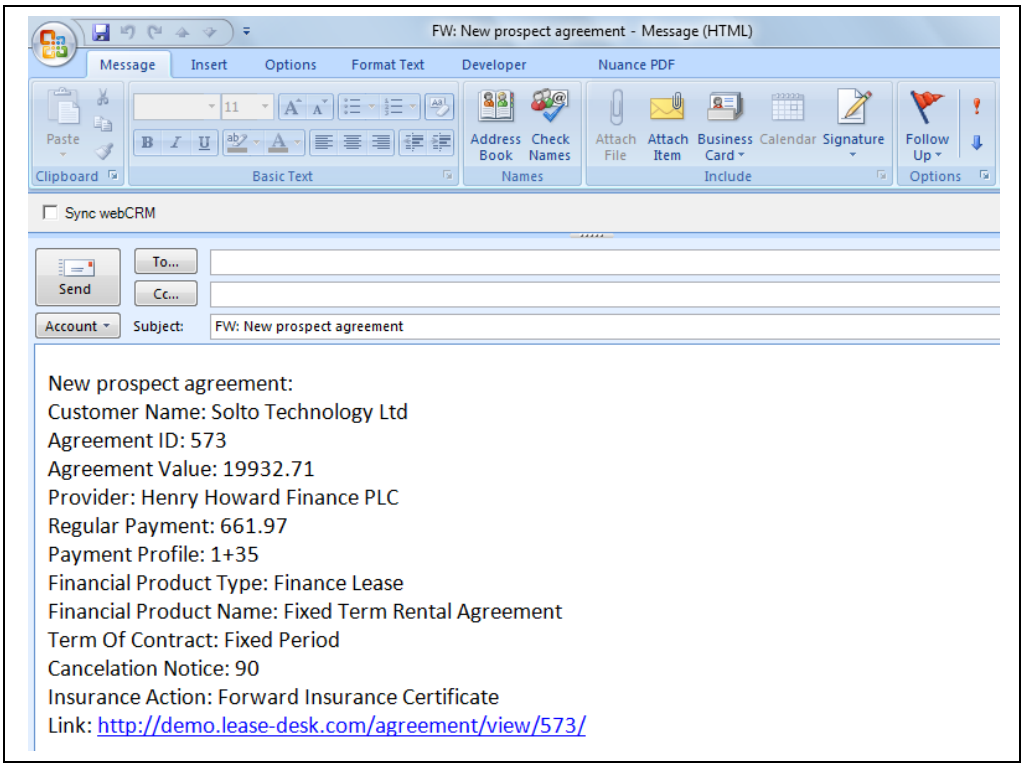
from the main alert list view or 

from the 'View Alert' Screen.

7.3 Forwarding Alerts:

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

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



8. General Functionality:

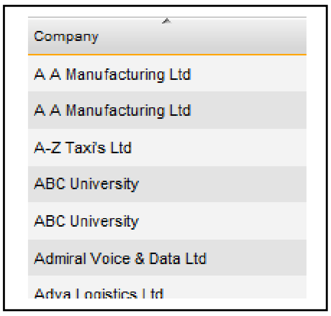
8.1. Sort:

Within Lease-Desk.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

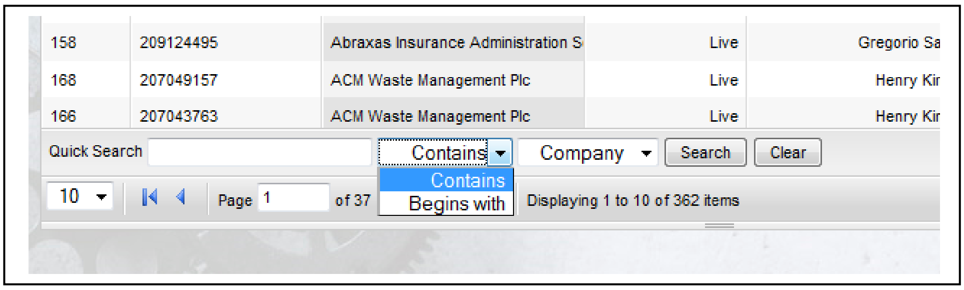
After Sort



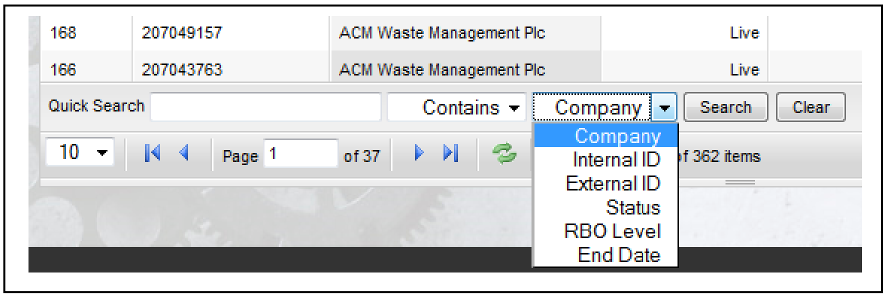
8.2 Quick Search:

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

1. First of all select your search method, either 'Contains' or 'Begins with' from the drop down menu as indicated below;

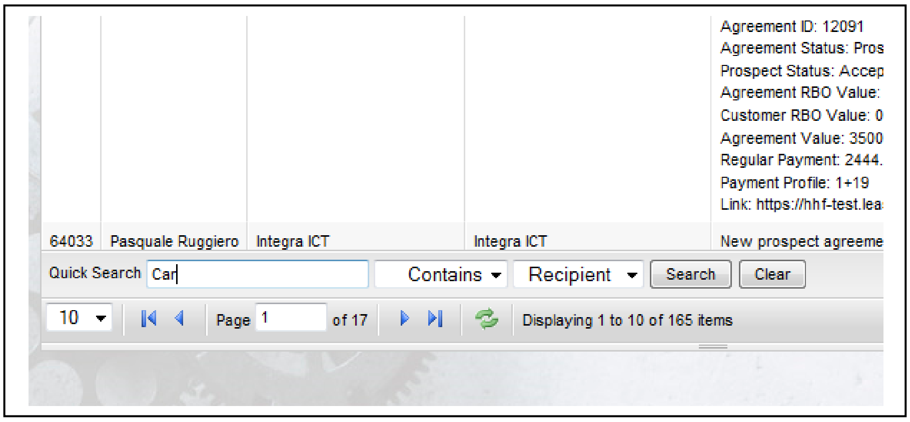


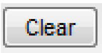
2. Next, change the Search option, click on the 2nd drop down menu as per below;



3. Enter the search detail and click on 

to bring up the details.



4. 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

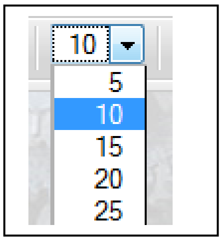
 Forward to end of records

 Go back to previous page of records

 Go to the start of the records

8.5 Changing the amount of records per view:

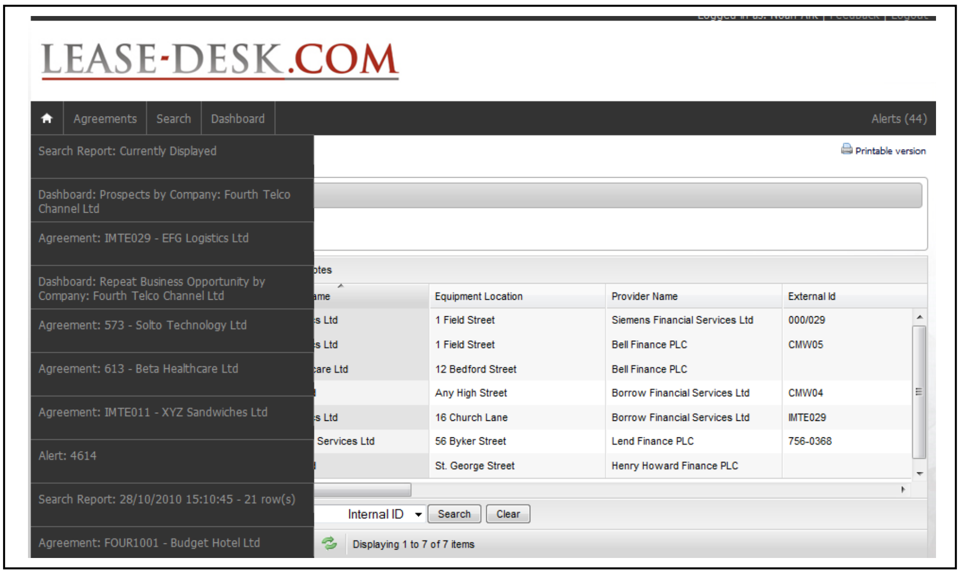
1. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



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;

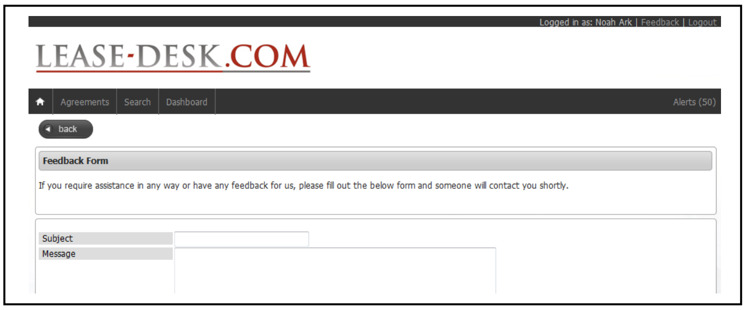


3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

9. Feedback:

1. To contact Lease-Desk’s administration team with any feedback, query or issue, from the main menu select ‘Feedback’.

2. You will then be presented with the ‘Feedback Form’ screen as indicated below;



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

4. Once completed, click 

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

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 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