LEASE-DESK

Super User Manual

Version 2.1

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1. An 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 Leasing Agreements in one place, highlighting valuable RBO opportunities from the existing base, helping to retain customers and increase revenue.

Proctor Consulting's Lease-Desk administration team are responsible for maintaining the software and liaising with the Financial Providers on the Vendors behalf, to ensure all leasing agreement and product information is kept up to date.

Once the existing Vendor client data has been uploaded by the Administrator(s), assigned Vendor users are able to Search, View, Edit, and Add depending on their hierarchy status, making it easy to access current and pending agreements, and check on pending agreement process. Lease-Desk's Dashboard functionality means Managers can view an instant snapshot of their current and pending leasing business opportunities.

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

The terminology for the different user types are determined below;

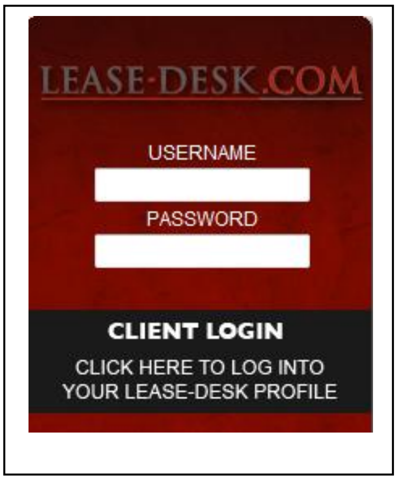
- **Normal:** Can only view their own agreements.
- **Main:** Can view all agreements related to their company.
- **Super:** Can view all agreements.

The terminology for the different group role types within Lease-Desk are defined below;

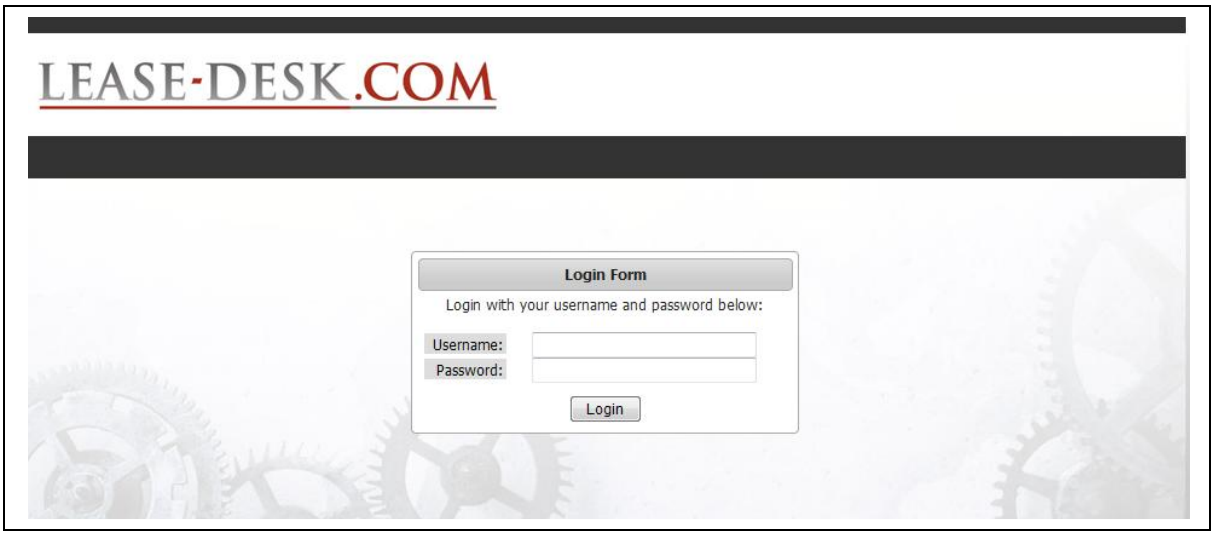
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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

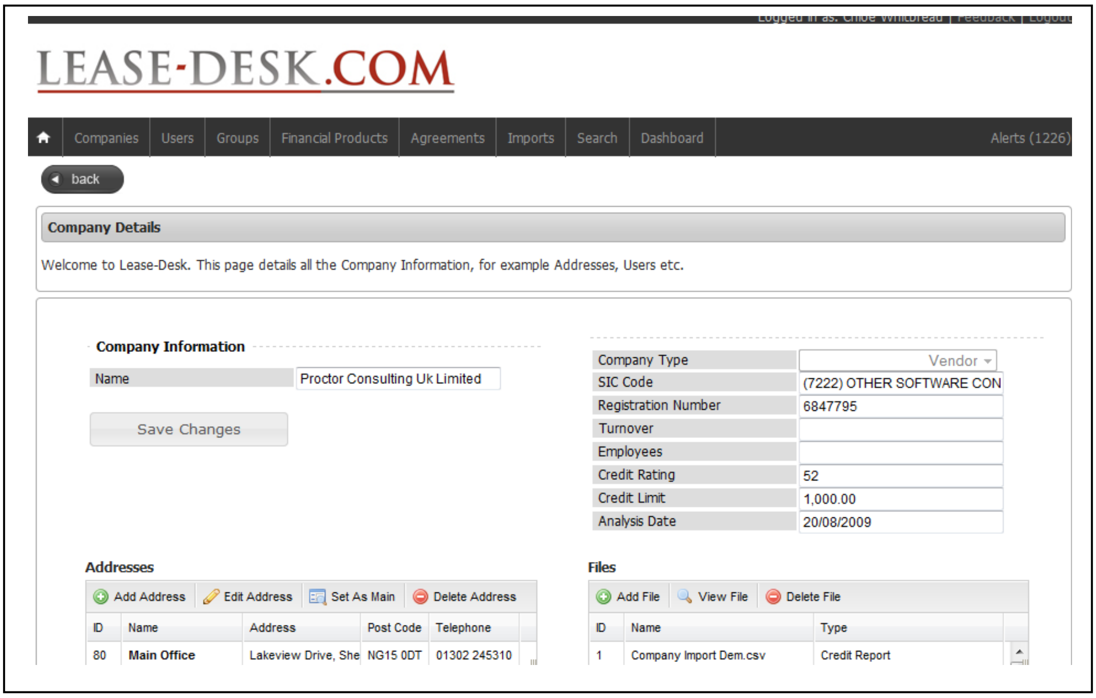


3. Enter your details and click on 

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

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

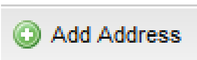
1. Once you have logged in you will be presented with the home screen, as per below.



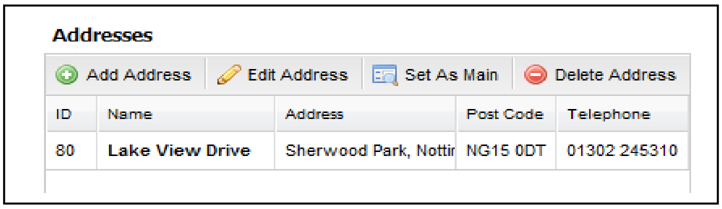
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider).

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

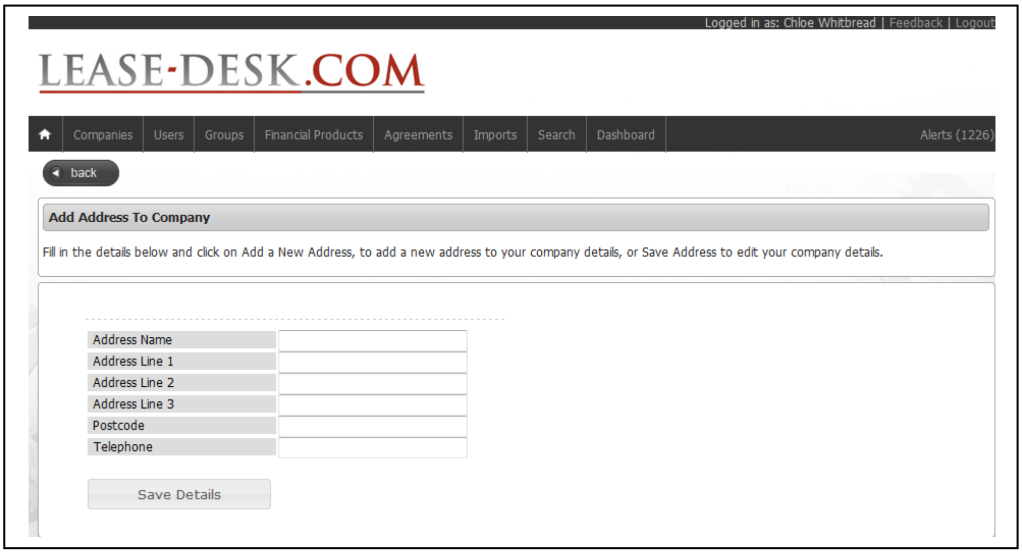
3.1.1. Adding an Address:

1. Click on 

from the main Addresses table as indicated below.



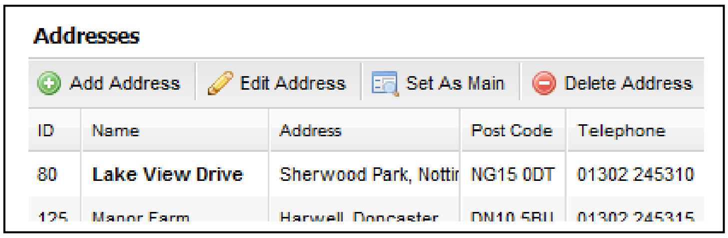
2. You will then be presented with the following 'Add an Address' screen;



3. Fill in the full address details and click on 

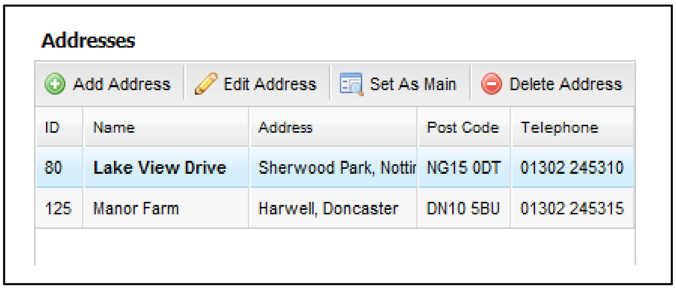
4. You will then be taken back to your Company Details screen in Edit mode and be presented with the following confirmation message;

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



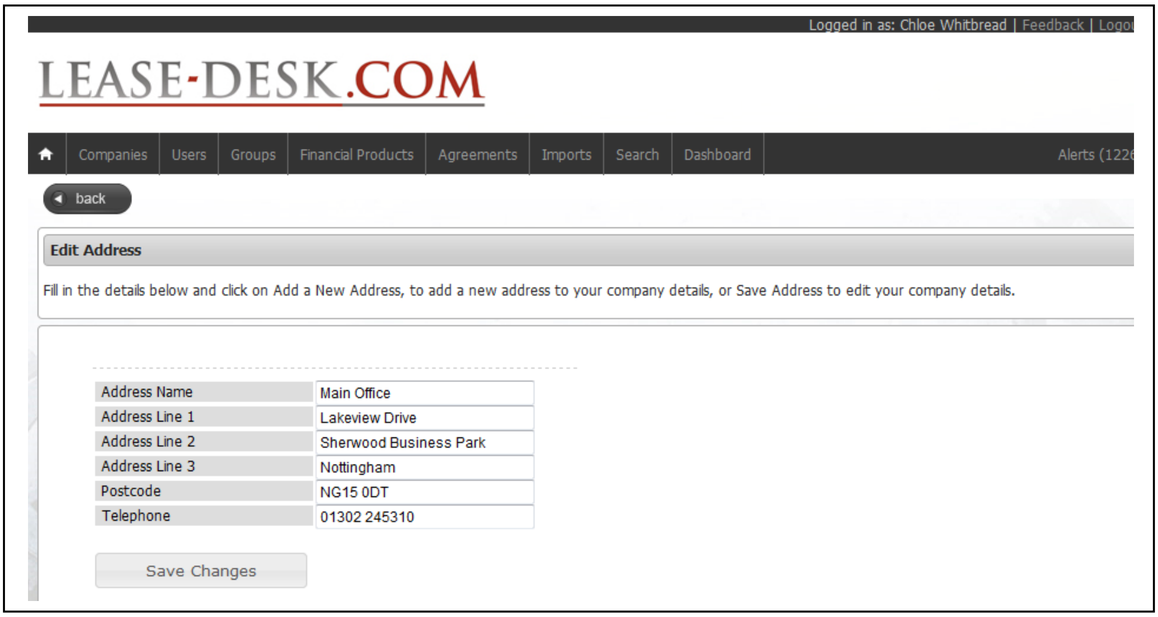
3.1.2. Editing an Address:

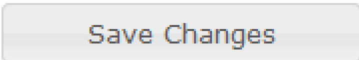
1. From the main Addresses table, highlight the required address as indicated below;



2. Click on 

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



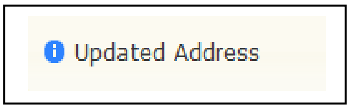
4. Amend the required Address details and click on 

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

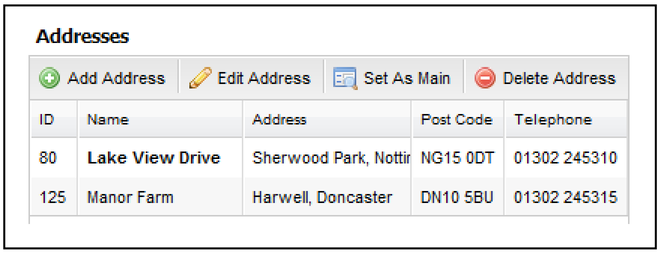
3.1.3. Setting an Address as Main:

1. To set an address against your Company Details as the main site address, highlight the required address (as indicated previously) and click 

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



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

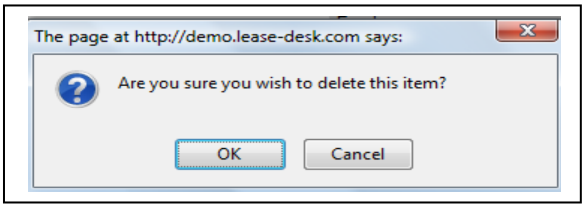


ID	Name	Address	Post Code	Telephone
80	**Lake View Drive**	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

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;



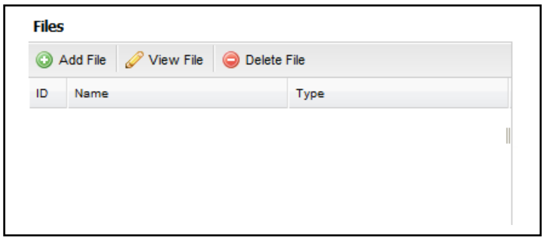
3. Click OK to delete (or Cancel to cancel the action).
4. Once you have confirmed deletion is required you will be presented with the following message and taken back to the Edit Company Details screen;

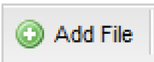
3.2. Adding, Viewing, and Deleting Files:

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

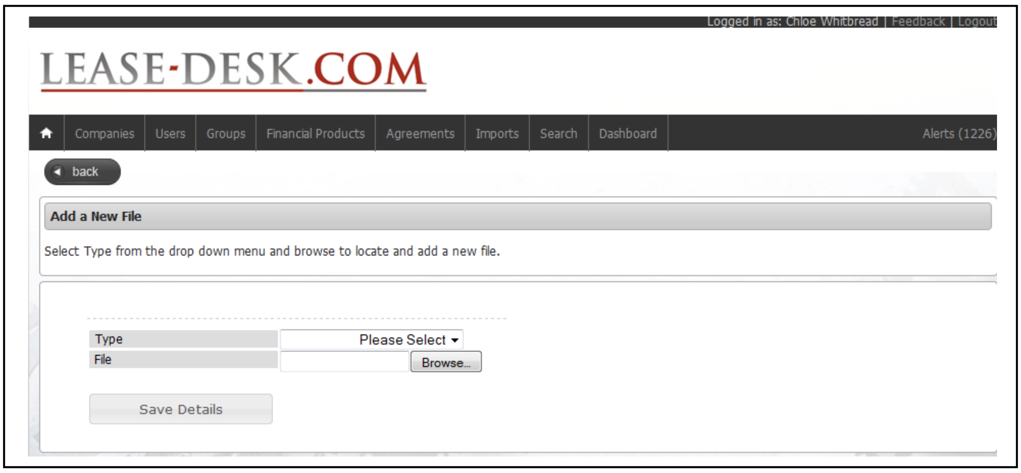
3.2.1. Adding a File:

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



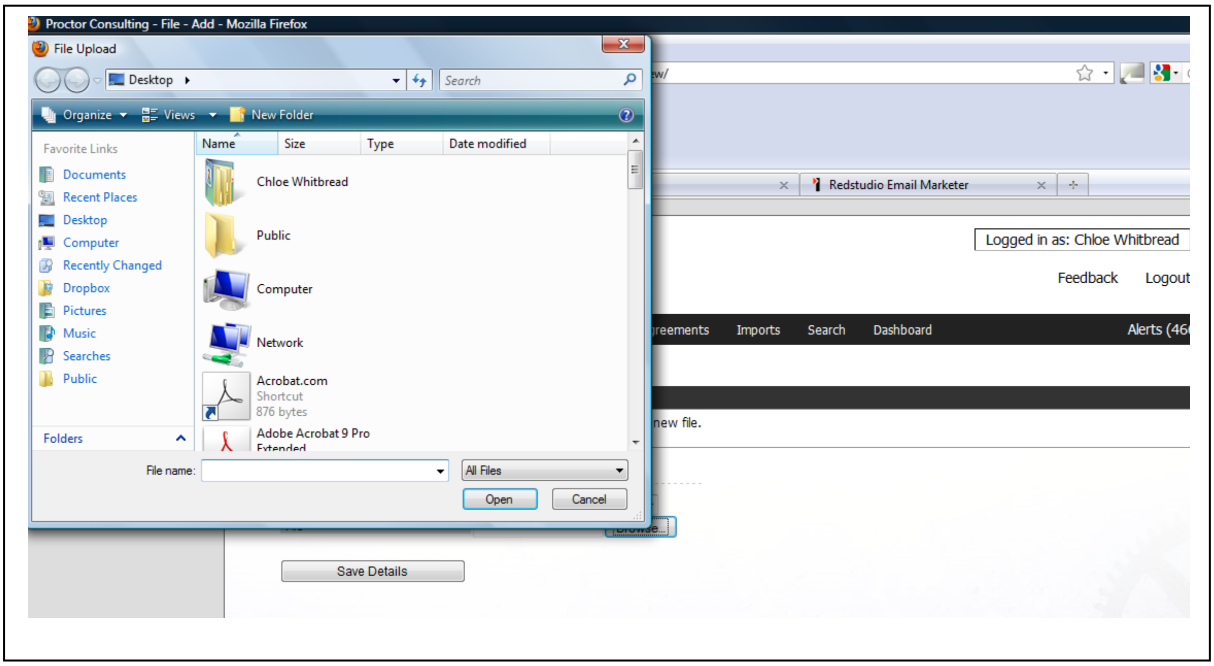
2. To add a file against your Company Details, click 

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



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

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



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

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

3.2.2. Viewing a File:

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

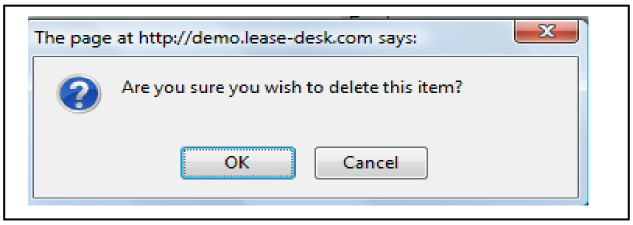
2. Click 

3.2.3. Deleting a File:

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

2. Click 

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



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

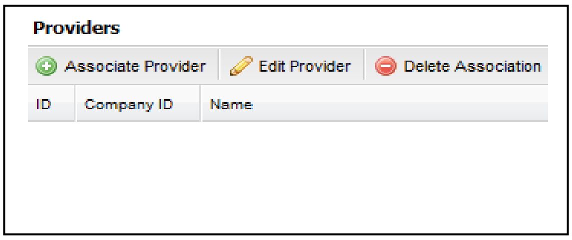
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;

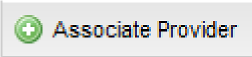
3.3. Providers: Associating, Editing, and Deleting Association:

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;



2. Click 

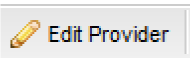
3. You will then be presented with the 'Add a Provider' screen as per below;

4. Press space or shift and * to bring up a drop down list of the Providers (or type name if known) 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 

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 (see 5.5.1), Files (following the same process as indicated previously)

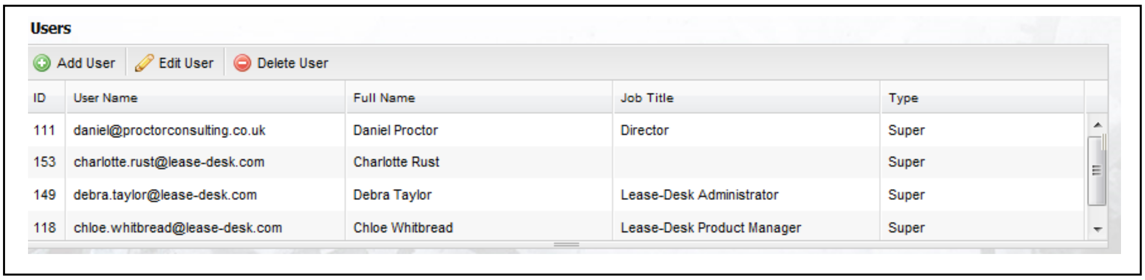
3.3.2. Deleting a Provider Association (Vendor Only):

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 Users:

3.4.1. Adding a User:

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

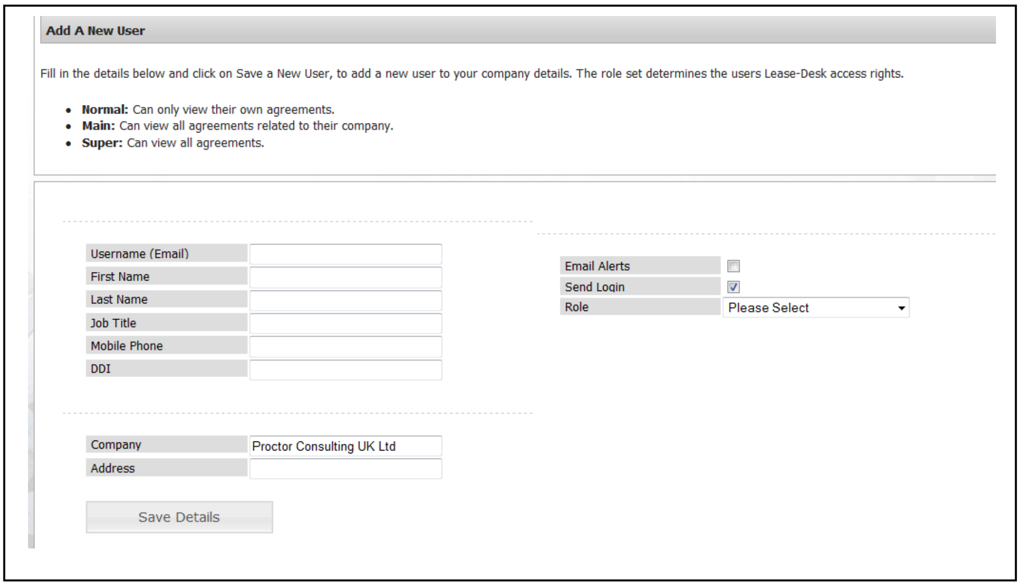

Users

Add User | Edit User | Delete User

ID	User Name	Full Name	Job Title	Type
111	daniel@proctorconsulting.co.uk	Daniel Proctor	Director	Super
153	charlotte.rust@lease-desk.com	Charlotte Rust		Super
149	debra.taylor@lease-desk.com	Debra Taylor	Lease-Desk Administrator	Super
118	chloe.whitbread@lease-desk.com	Chloe Whitbread	Lease-Desk Product Manager	Super

2. Click Add User

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



4. Fill in the full User Details, First Name, Last Name, etc. The Username, First and last name, Company, address and role are mandatory.

Note: The Company should auto populate to your Company, as you are adding a user to your Companies details. To bring up the address details either press space or start typing and a list will appear for you to select your entry.

In addition, the 'send login details' box will always default to be sent if you are a vendor or are adding a user to a vendor.

The Alerts tick box is for users that will be adding/viewing Agreement information and will need email alerts sent to them, for example Account/Sales Managers at a Vendor.

In addition, the Role type selected will determine what rights the user has, for example Super Users will have access to all areas with editing functionality, whilst Normal Users will only have access to their agreement and company information and limited editing rights.

5. Click 

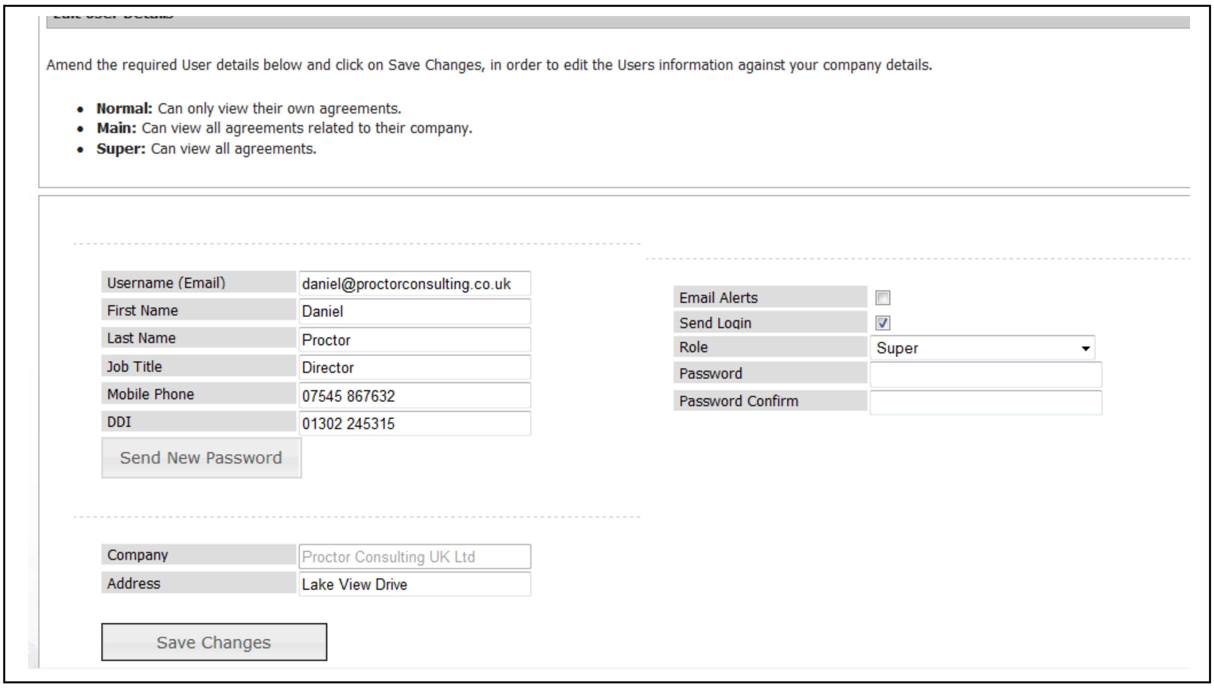
6. You will then receive the following confirmation message and be taken back to the main Company Details screen;

3.4.2. Editing a User:

1. To edit a User against your Company Details, go to the Users table, within the Edit Company Details screen as previously shown, and highlight the required user.

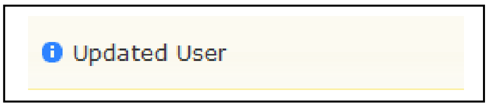
2. Click 

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



4. Amend the required details and click 

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



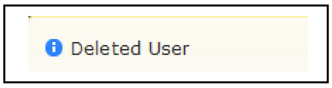
3.4.3 Deleting a User:

1. To delete a User against your Company Details, go to the Users table, within the Edit Company Details screen as previously shown, and highlight the required user.

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.

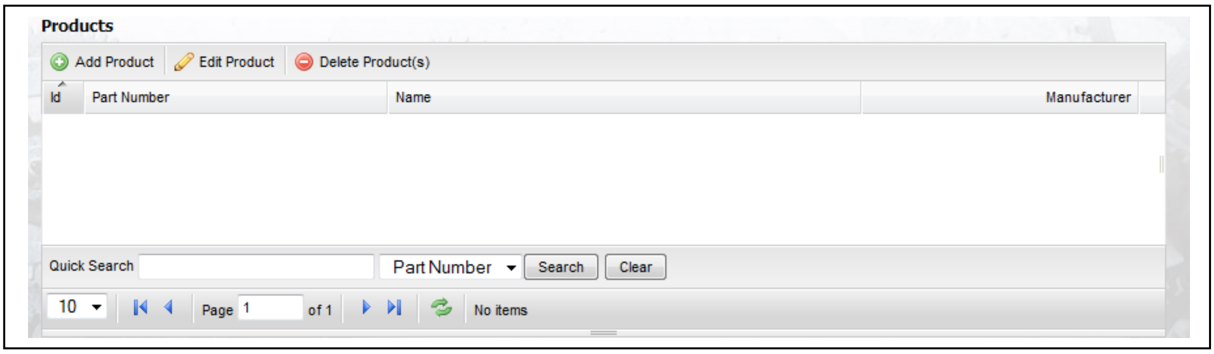
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;



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

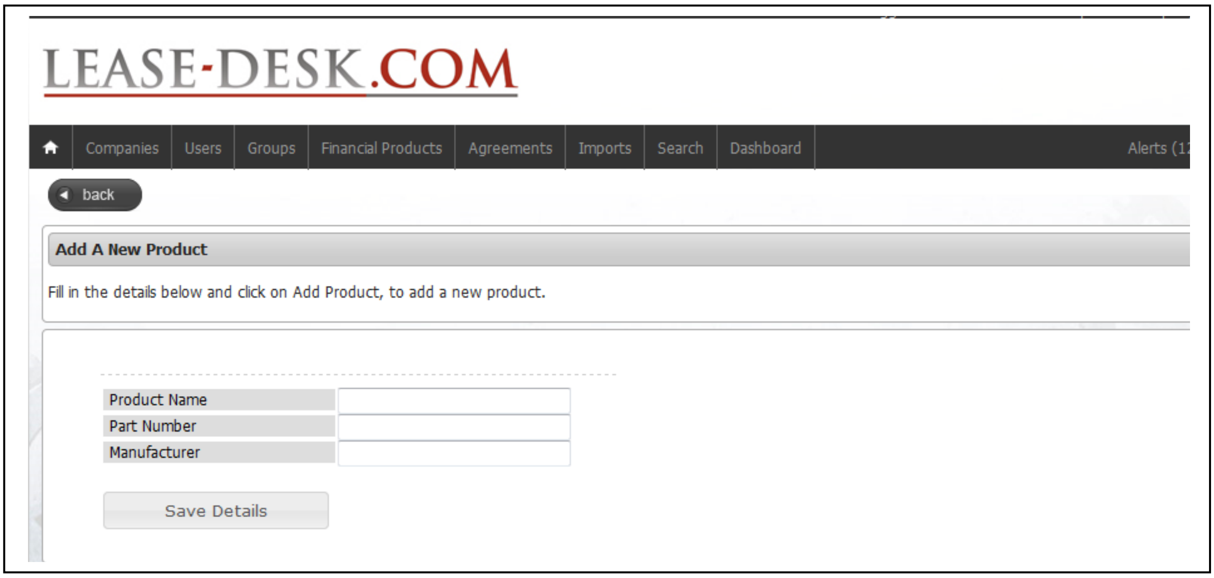
3.5.1 Adding a Product:

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



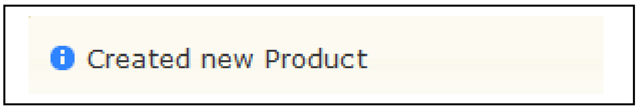
2. Click 

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



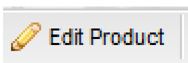
4. Fill in the details and click 

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

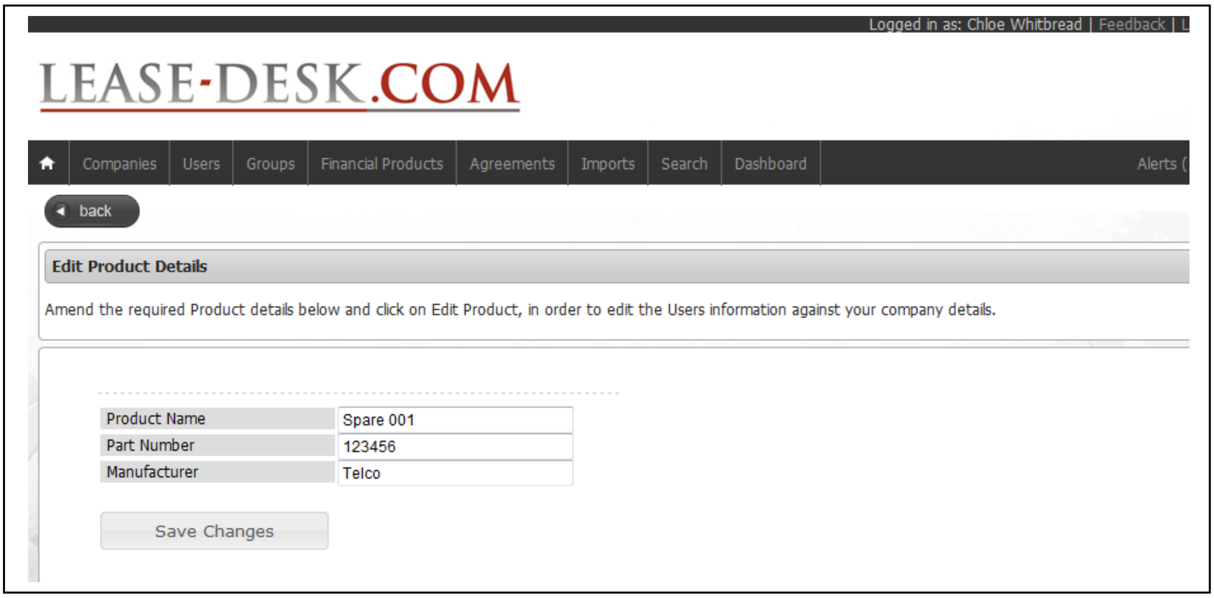


3.5.2 Editing a Product:

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

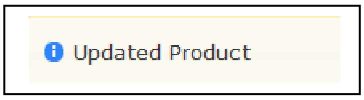
2. Click 

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



4. Amend the required detail and then click 

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



3.5.3 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. **(Note: You will be unable to delete a product that is associated with one or more Agreements).**

2. Click 

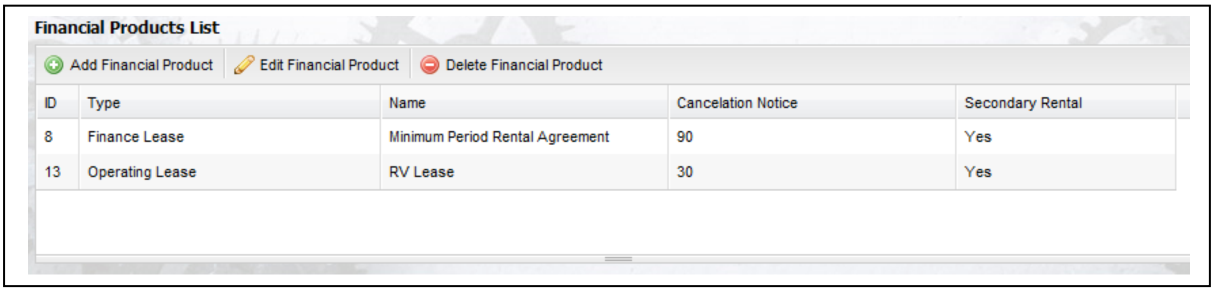
3. You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.

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

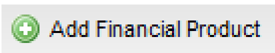
3.6. Adding, Editing and Deleting Financial Products (Financial Provider Only):

3.6.1 Adding a Financial Product:

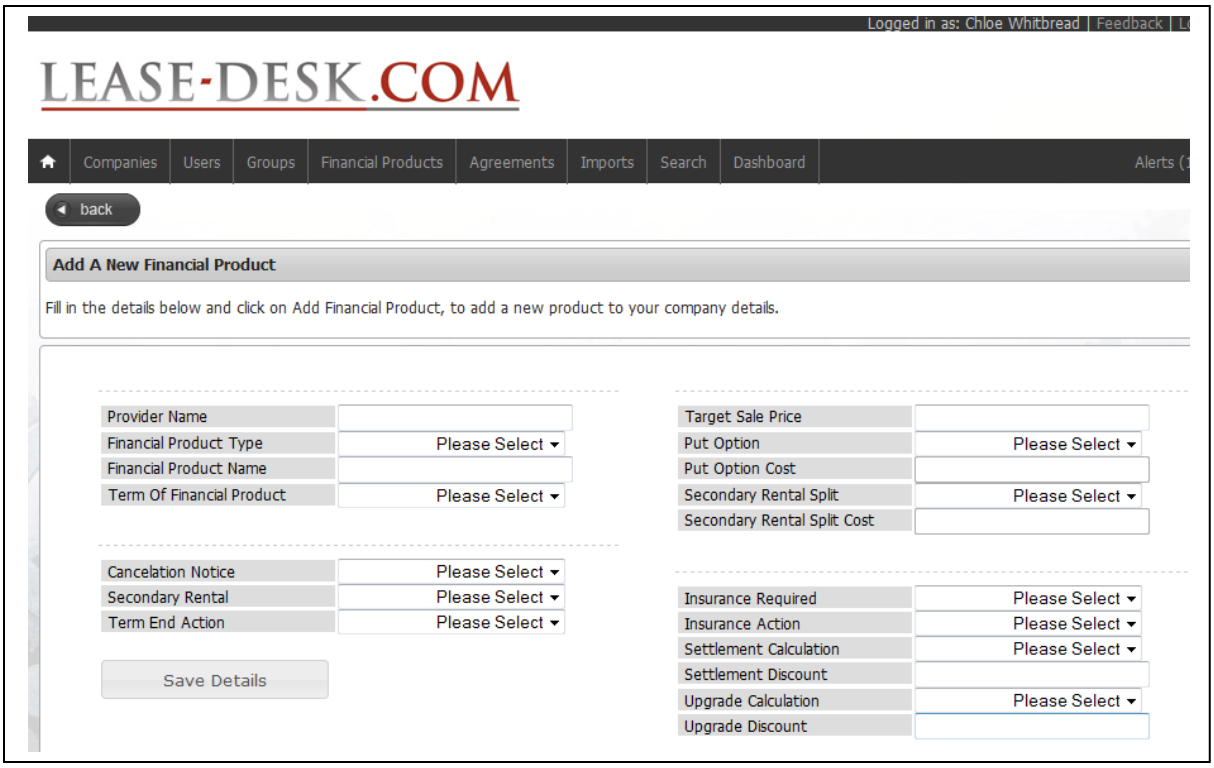
1. To add a Financial Product to your Company Details, go to the main Financial Products table within the homepage as indicated below;



ID	Type	Name	Cancelation Notice	Secondary Rental
8	Finance Lease	Minimum Period Rental Agreement	90	Yes
13	Operating Lease	RV Lease	30	Yes

2. Click 

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



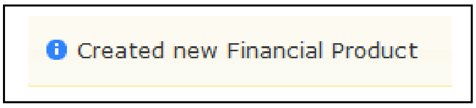
4. Fill in the following Financial Product Details;

- **Provider Name:** (press space, shift and * or start typing to bring up the list of providers)
- **Financial Product Type:** (From the drop down menu)
- **Financial Product Name:** Enter the name of the Financial Product here
- **Term of Contract:** This should be specified by the Provider and will be fixed or minimum
- **Cancelation Notice:** (Whether there is any notice for the customer when cancelling)
- **Secondary Rentals:** (When the product offered within the lease agreement goes into secondary rentals following the end of the contract.)
- **Term End of Action:** (What happens at the end of the contract, i.e. the equipment goes to the customer)
- **Target Sales Price (If Applicable)**
- **Put Option:** From the drop down menu, either Yes or No and can be a value or percentage.
- **Put Option Cost:** This will be either a percentage or value and will be added to the settlement amount on all agreements where this Financial Product is used.
- **Secondary Rental Split:** This will be either Yes or No and can be a value or percentage.
- **Secondary Rental Split Cost:** This will be either a value or percentage.
- **Insurance Required:** (Whether there is an insurance clause within the Financial Product type which advises insurance evidence must be provided by the Vendor/Customer.)
- **Insurance Action:** Confirm in Writing, Provide Policy, Forward Insurance Certificate or None
- **Settlement Calculation** (This will be either Rule of 78 or Rental Stream)
- **Settlement Discount: :** i.e. 3% (normally specified in Financial Providers T's & C's)

- **Upgrade Calculation:** (This will be either Rule of 78 or Rental Stream)
- **Upgrade Discount:** i.e. 3% (normally specified in Financial Providers T's & C's)

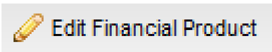
5. Click 

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

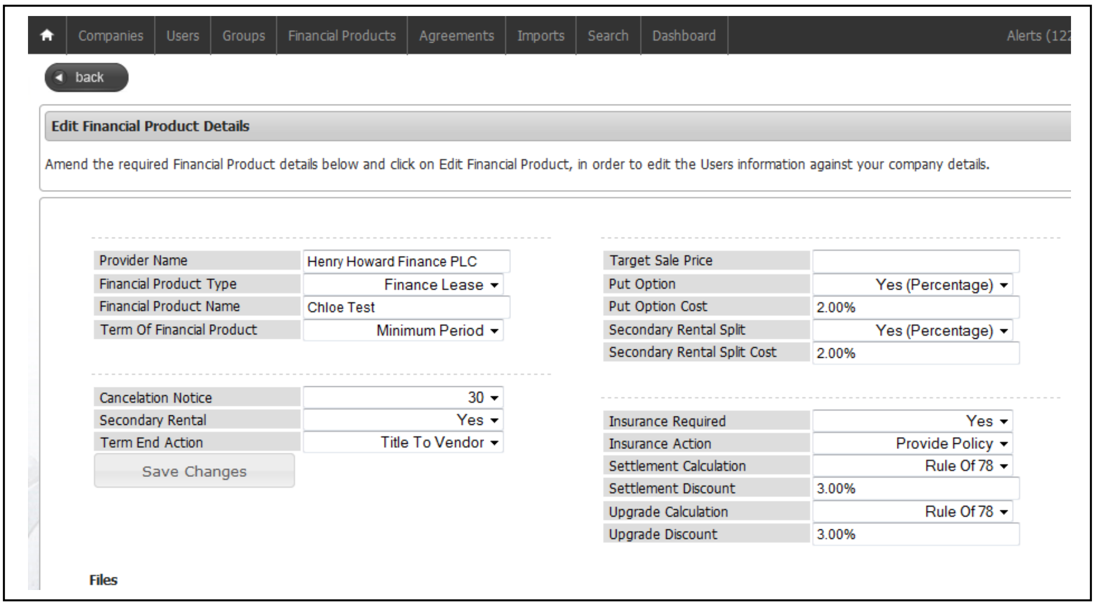


3.6.2 Editing a Financial Product (Financial Provider Only):

1. To edit an existing Financial Product against your Company Details, go to the main Financial 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 Financial Product Details' screen as per below;



4. Amend the required details and click Save Changes

Note: You will be unable to amend the majority of details within the Financial Product once it has been set up on the system. If any amendments with the figures need to be changed a new Financial Product should be raised.

Note: You will see you can Add, View or Delete Files from this page as well. Follow the previous process in 5.2 on how to do this.

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

Updated Financial Product

3.6.3 Deleting a Financial Product (Financial Provider Only):

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 Delete Financial Product

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;

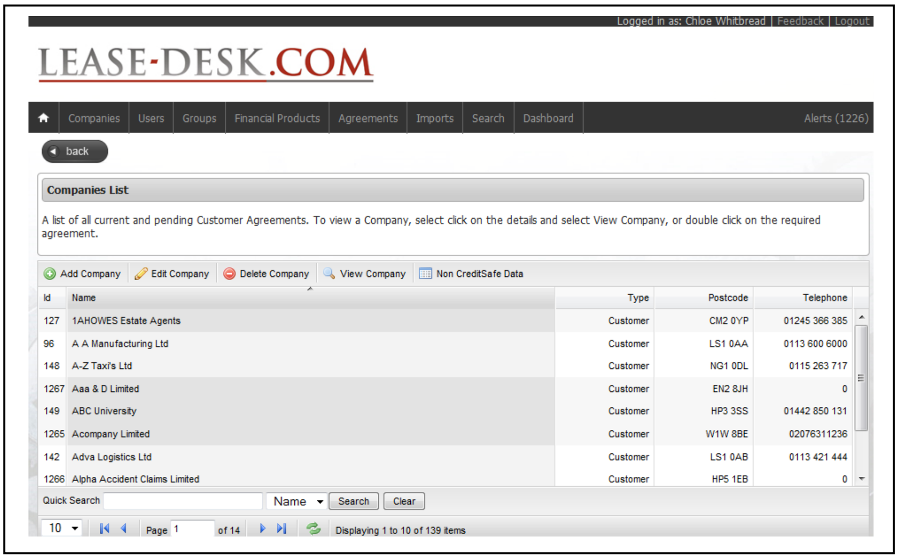
Deleted Financial Product

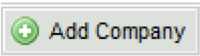
4. Companies Screen: Adding, Editing, Viewing & Deleting

4.1. Adding a Company:

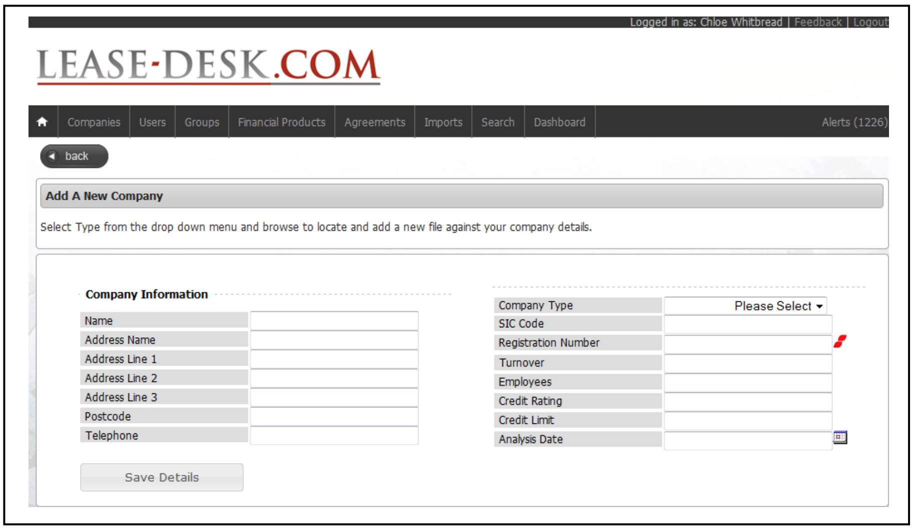
1. From the main menu select 

2. This will take you to the Companies List screen as indicated below;



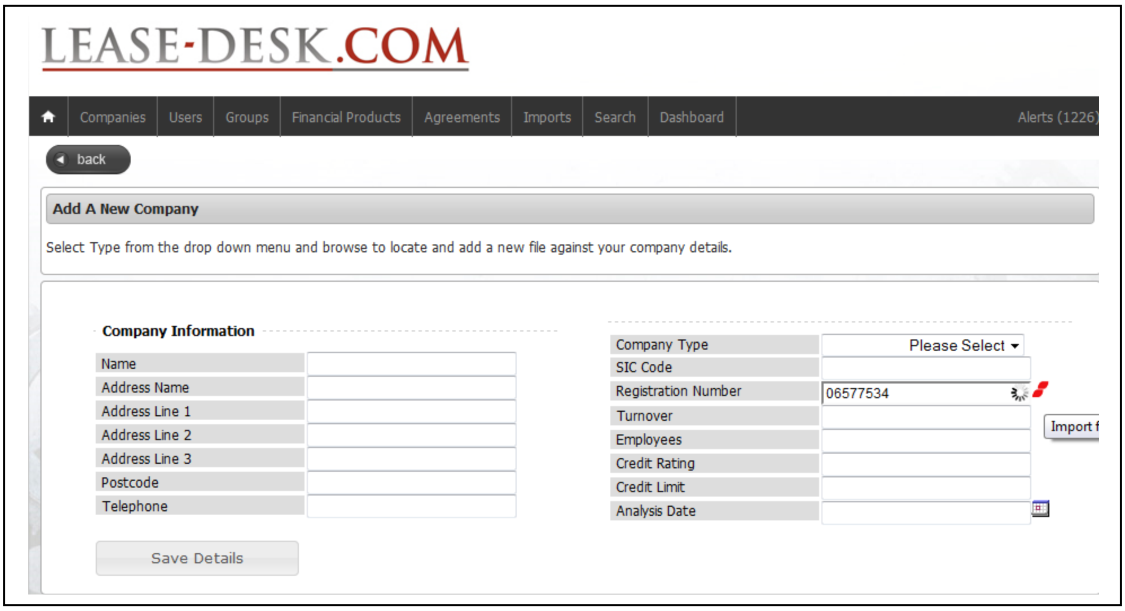
1. Click on 

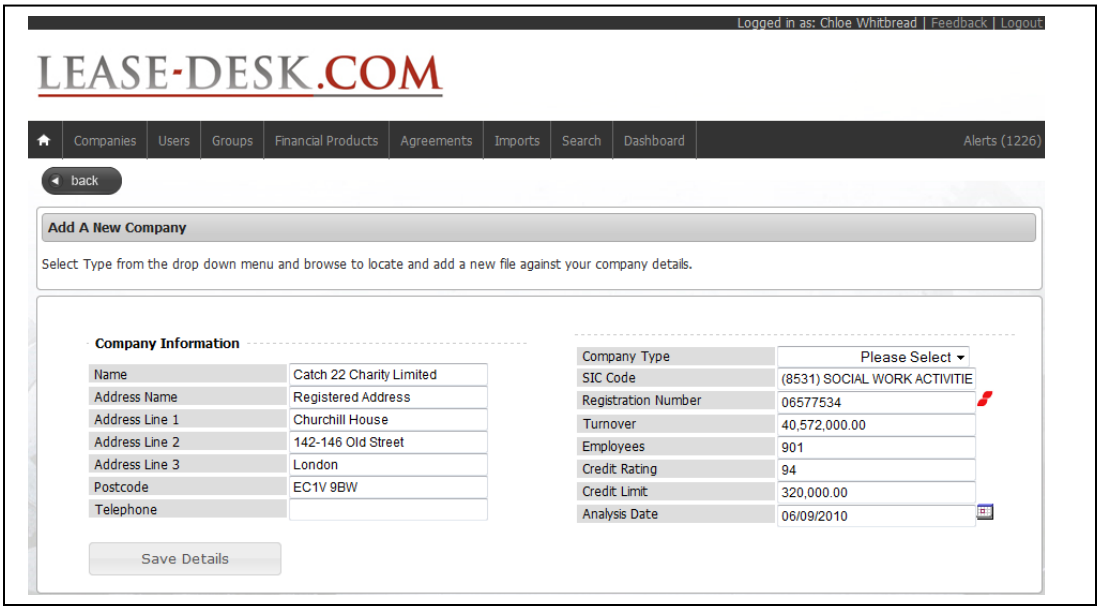
2. You will then be presented with the 'Add a new Company Screen' as indicated below;



3. If you have the company registration number, enter this into the relevant field and then click on the (Credit Safe) Icon. If you do not, please go to point 9.

4. The system will then use the XML live gateway to gather the company information direct from Credit Safe and automatically fill out the details it has listed, as indicated below;

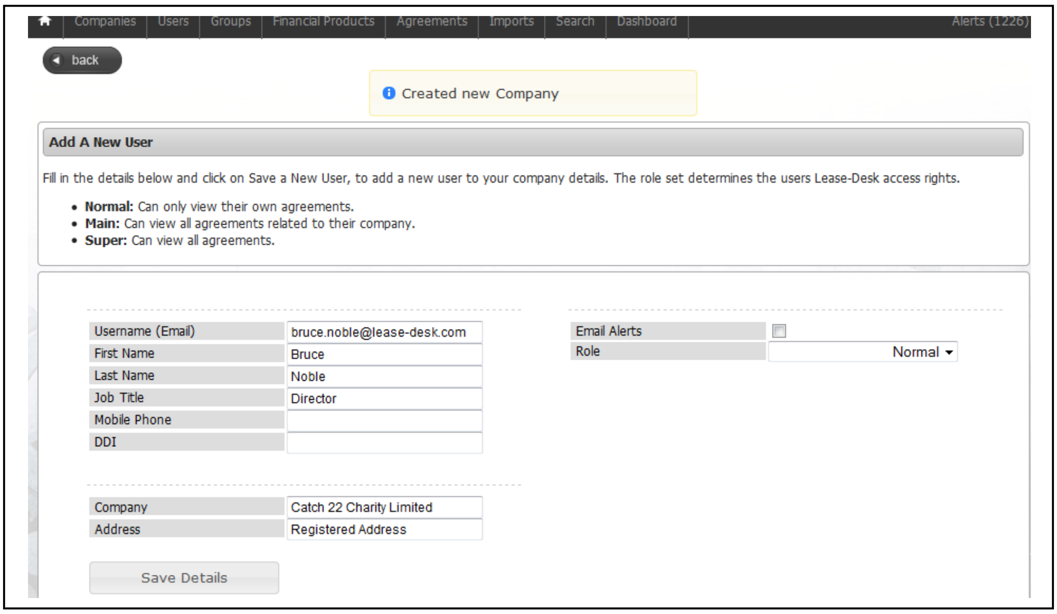




5. If known, then complete the telephone number field and the Company Type (Provider, Customer or Vendor).

6. Click on 

7. You will then be taken to the 'Add a new User' screen as per below;



8. The XML gateway will then gather the first director's information live from credit safe and complete the details, as per above. Provided all of the details are completed, click on

9. Complete the following fields;

- Name
- Address Name, i.e. Head Office
- Address Line 1
- Address Line 2
- Address Line 3
- Postcode
- Telephone
- Company Type (Note; This will be either a Provider, i.e. Financial Provider, Vendor, i.e. the technology vendor or Customer, i.e. the end user.

10. And if known the following additional details;

- SIC Code
- Turnover

- Company Registration (Input N/A if the Company is not a Limited Company)
- Employees
- Credit Rating
- Credit Limit
- Analysis Date (This is the date entered when the Credit Limit and Rating have been checked)

11. Once completed, click on 

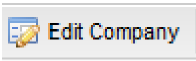
to save the Company.

12. You will then be taken back to the main Companies List Screen again and presented with the following confirmation message;

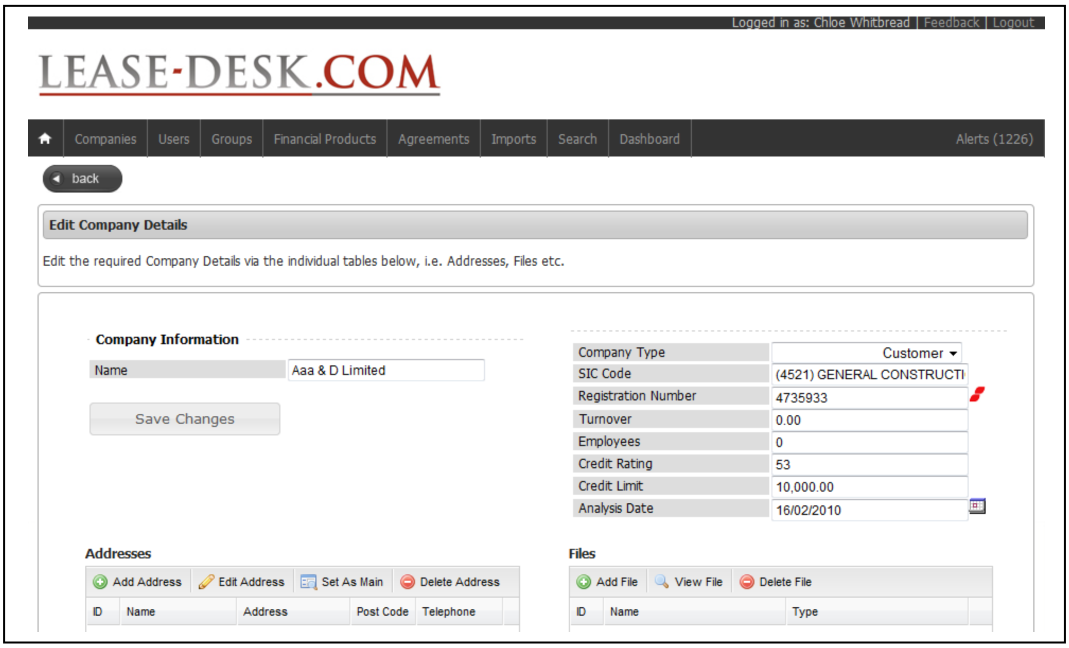
4.2. Editing a Company:

1. Follow previous steps 1 and 2 (From 4.1).

2. Highlight or double click on the required Company from the main Companies List.

3. Click on 

4. You will then be presented with the 'Edit Company Screen' as per below.



5. You can then edit any of the Company Information within the following tables;

- **Addresses** (Add, Edit, Delete)
- **Files** (Add, View and Delete)
- **Users** (Add, View and Delete)
- **Providers** (if Company is a Vendor)
- **Groups** (if Company is a Vendor)
- **Financial Products** (if Company is a Financial Provider)**,**
- **Products** (if Company is a Vendor)

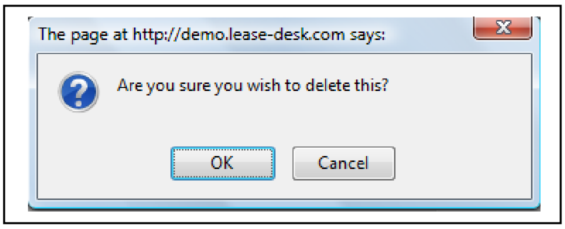
5a. In addition, you can click on the  icon to gather the most up to date, live credit information through the XML gateway. Any updates will be recorded in the audit log at the bottom of the page.

6. For how to Add, Edit, View or Delete any information from the tables listed above, follow the relevant process in chapter 5.

4.3. Deleting a Company:

1. Highlight a Company from the Companies table and then click on 

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



3. Select OK to delete or Cancel to cancel the action.

Note: Companies removal will delete everything related to them (Products / Users / Company association) when they are not associated with an agreement.

4. Once deletion has been confirmed, you will be taken back to the main Companies List screen and receive the following confirmation message;

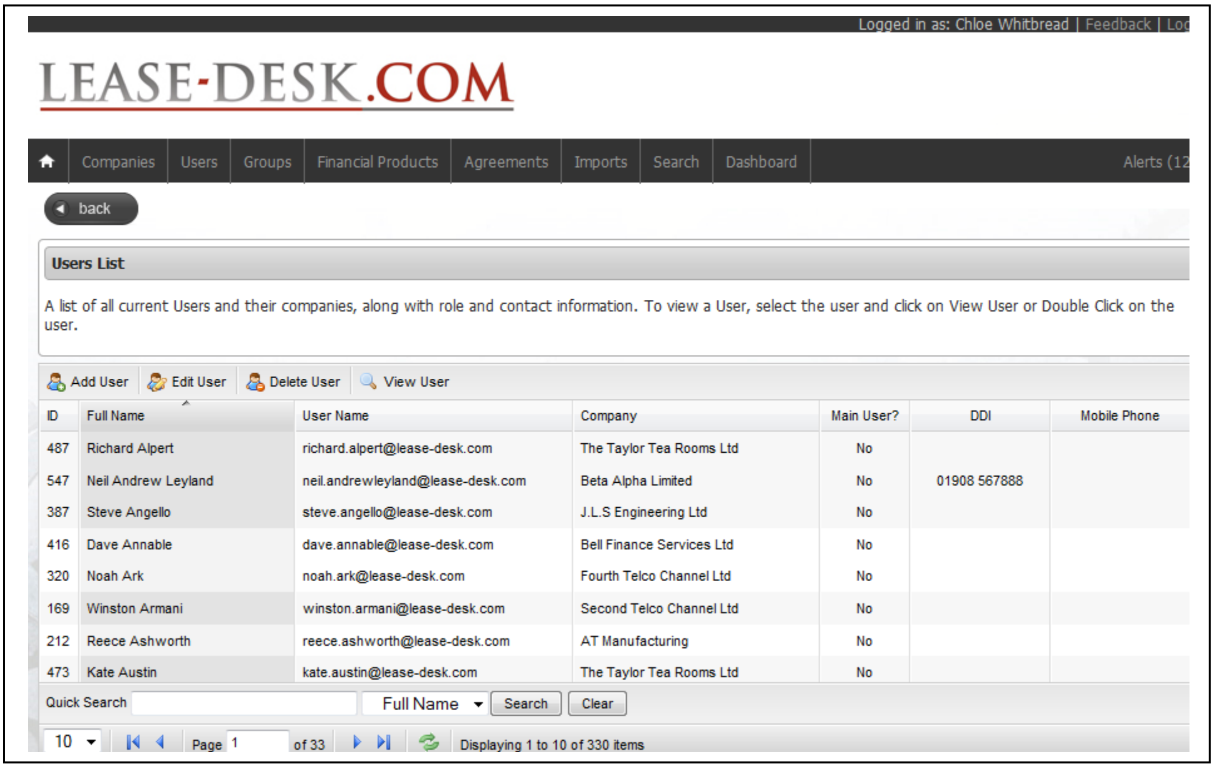
4.4. Viewing a Company:

1. Highlight a Company from the table and then click on View Company
2. You will then be presented with the Company Details screen.

5. Users Screen: Adding, Editing, Viewing & Deleting

5.1. Adding a User:

1. From the main menu go to Users
2. This will take you to the main Users screen as indicated below;



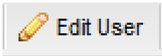
ID	Full Name	User Name	Company	Main User?	DDI	Mobile Phone
487	Richard Alpert	richard.alpert@lease-desk.com	The Taylor Tea Rooms Ltd	No		
547	Neil Andrew Leyland	neil.andrewleyland@lease-desk.com	Beta Alpha Limited	No	01908 567888	
387	Steve Angello	steve.angello@lease-desk.com	J.L.S Engineering Ltd	No		
416	Dave Annable	dave.annable@lease-desk.com	Bell Finance Services Ltd	No		
320	Noah Ark	noah.ark@lease-desk.com	Fourth Telco Channel Ltd	No		
169	Winston Armani	winston.armani@lease-desk.com	Second Telco Channel Ltd	No		
212	Reece Ashworth	reece.ashworth@lease-desk.com	AT Manufacturing	No		
473	Kate Austin	kate.austin@lease-desk.com	The Taylor Tea Rooms Ltd	No		

3. Click on 

4. You will then be presented with the ‘Add a User Screen’.

5. Follow points within the previous chapter, ‘**3.4.1. Adding a User’**

5.2. Editing a User:

1. To edit a user, highlight the required user and then click on 

2. Follow points within the previous chapter, ‘**3.4.2. Editing a User’**

5.3. Deleting a User:

1. To delete a user, highlight the required used and then click on 

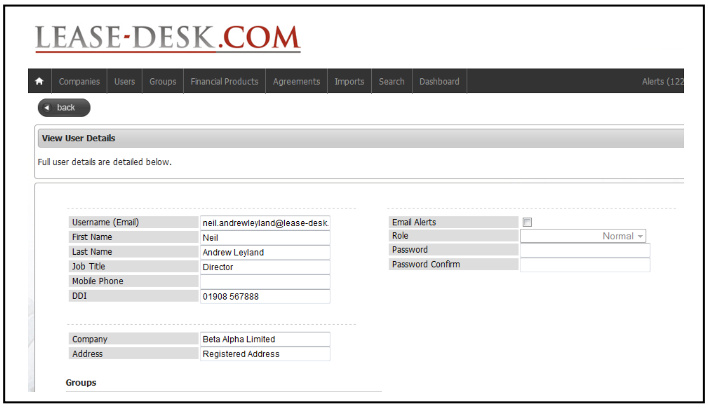
2. Follow points within the previous chapter, ‘**3.4.3. Deleting a User’**

Note: User removal will delete everything related to them (alerts/ group association) when they are not associated with an agreement.

5.4. Viewing a User:

1. To view a user, highlight the required user from the table and click on 

2. You will then be presented with the View User Details screen as below;

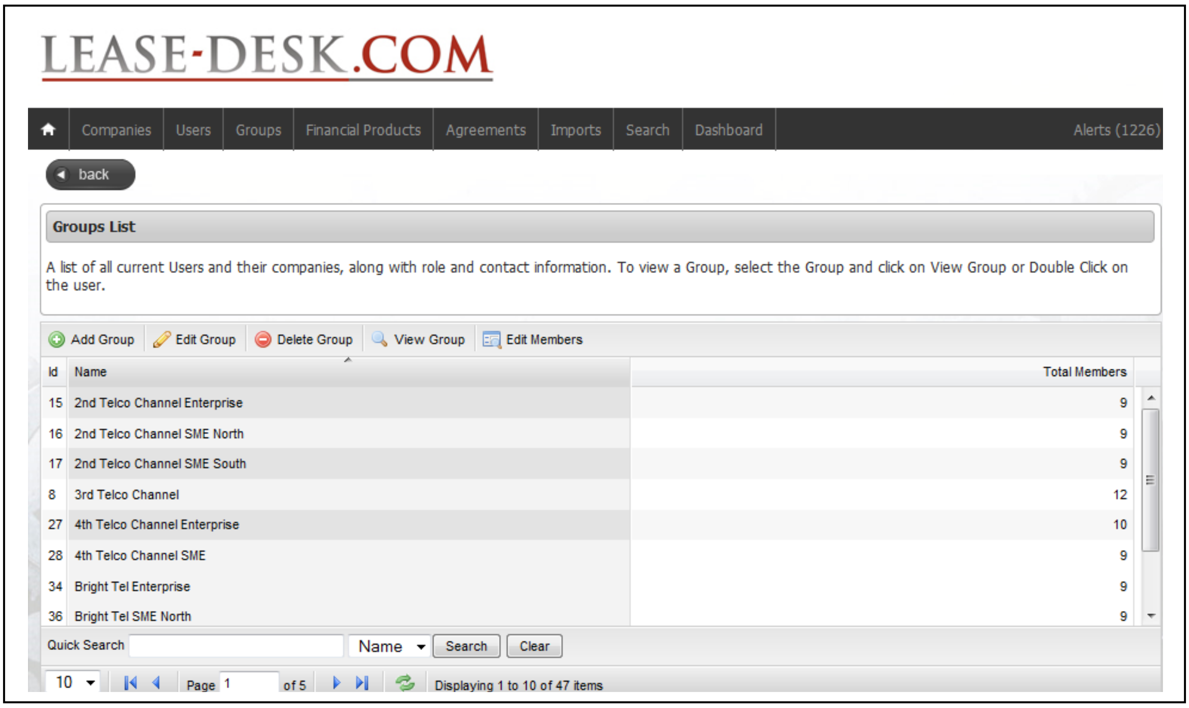


6. Group Screen: Adding, Editing, Viewing, Deleting & Editing Members

Note: The Groups functionality means that individual groups can be created for every required business area (for example, Southern Team, Northern Team). Users are able to share their information as determined by their role type. This is the process of ensuring Senior Managers can view the organisations complete portfolio and Team Managers can view their individual team's success.

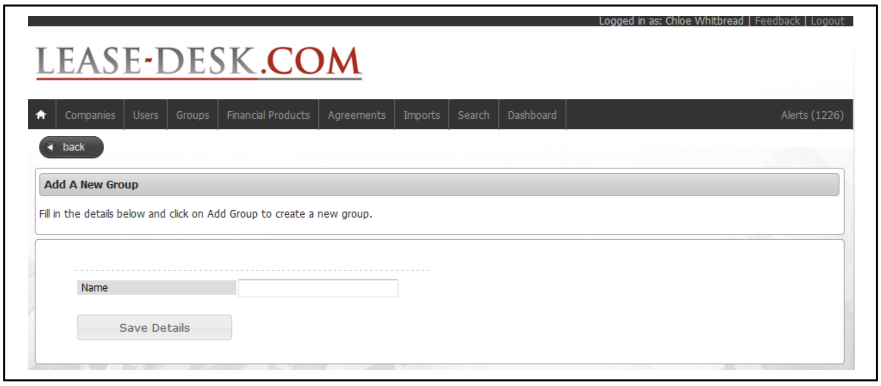
6.1. Adding a Group:

1. From the Main Users screen as previously shown, go to Groups



2. Click Add Group

3. You will then be presented with the Add a new Group Screen as below;



4. Add the new Group Name and then click 

5. You will then be taken back to the main Groups screen and will be presented with the following confirmation message;

6.2. Editing a Group:

1. To edit a Group, highlight the required Group from the Groups List.

2. Click 

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

4. Amend the details and then click 

5. You will then be taken back to the main Groups List screen and presented with the following confirmation message;

6.3. Deleting a Group:

Note: Group removal will delete the user associations, whether or not they are used in agreements, it will not delete any Users of the system.

1. To delete a Group, highlight the required Group from the Groups List.

2. Click 

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

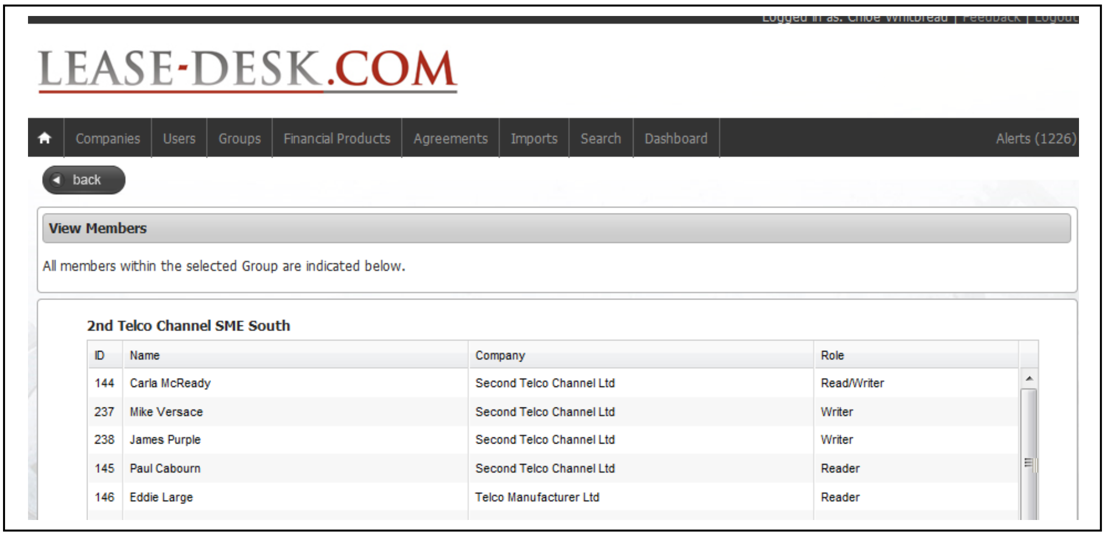
4. You will then be presented with the following confirmation message;

6.4. Viewing a Group:

1. To view a Group, highlight the required Group from the Groups List table.

2. Click 

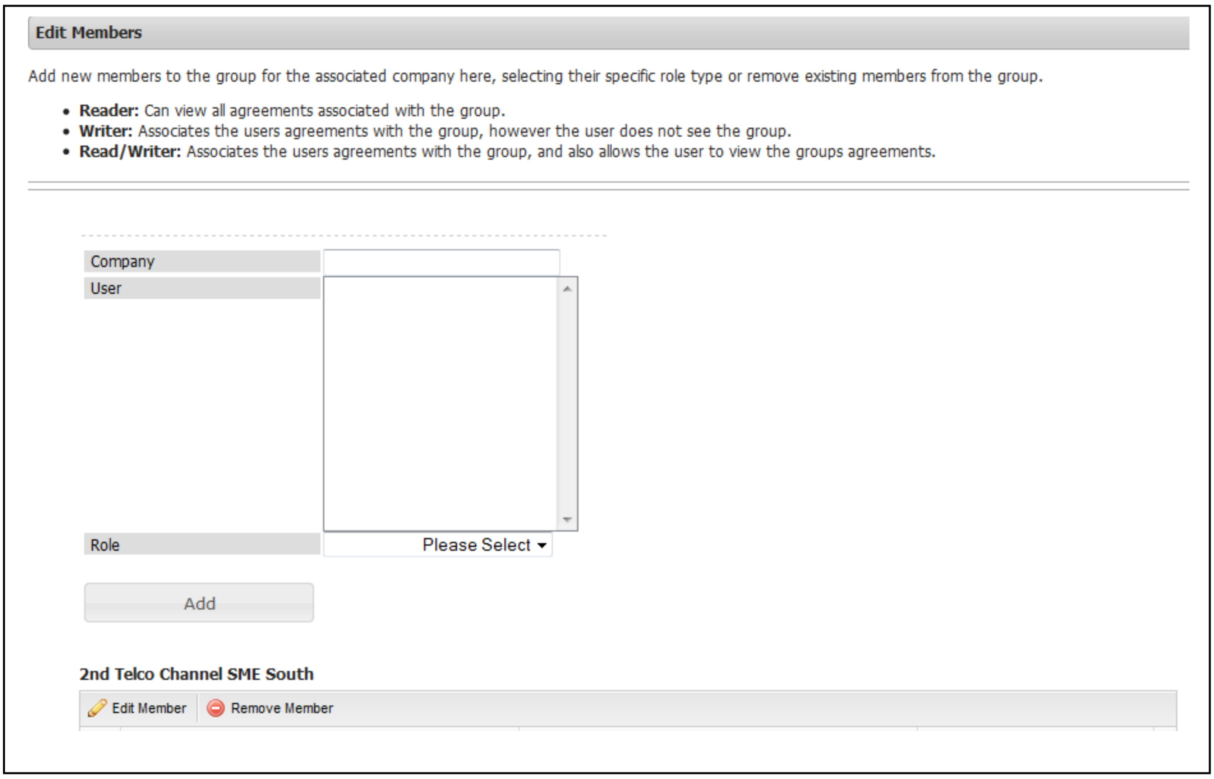
3. You will then be presented with the following View Members screen;



6.5. Editing Members:

1. To Edit Members within a Group, highlight the required Group from the Groups List table and click on Edit Members

2. You will then be presented with the Edit Members screen as per below;



3. Enter the Company name which will bring up the list of companies for you to select.
   Note: You can also press space or shift and * which will bring up the full company list.

3a. Once you have selected the company you require, the users within that Company will be displayed.

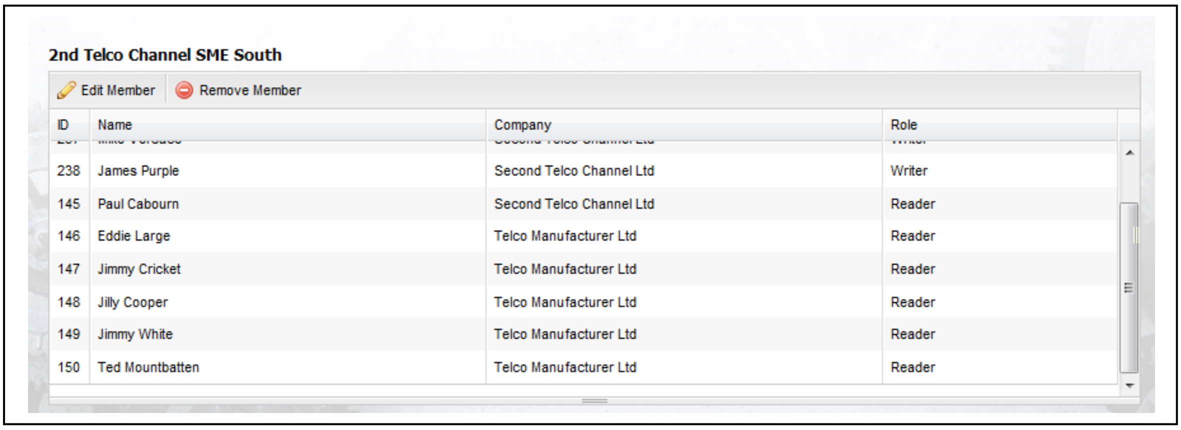
4. Highlight the required User, and then select a Role from the drop down menu, as detailed below.

Note: The Role Definitions are as follows;

- **Reader:** Someone who views information but doesn't add anything to the group, i.e. Director
- **Writer:** Someone who adds information to the group in terms of agreements, i.e. Account Managers
- **Reader/Writer:** Someone who does both, i.e. Sales Managers (who may also add agreements from time to time)

6. Click 

7. The User will then disappear from the list and be added to the group as a member and displayed in the table at the bottom of the screen as per below;

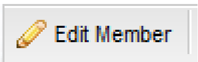


2nd Telco Channel SME South

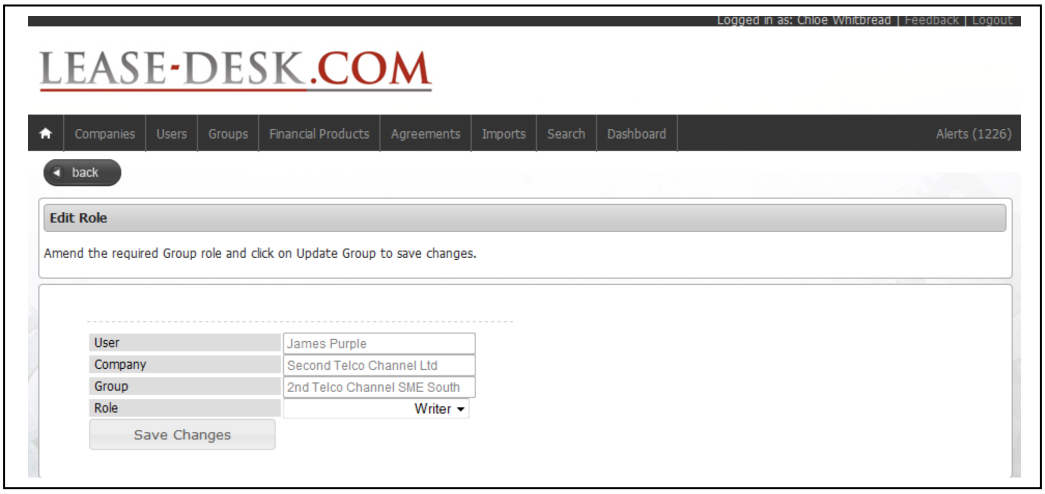
Edit Member | Remove Member

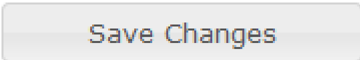
ID	Name	Company	Role
238	James Purple	Second Telco Channel Ltd	Writer
145	Paul Cabourn	Second Telco Channel Ltd	Reader
146	Eddie Large	Telco Manufacturer Ltd	Reader
147	Jimmy Cricket	Telco Manufacturer Ltd	Reader
148	Jilly Cooper	Telco Manufacturer Ltd	Reader
149	Jimmy White	Telco Manufacturer Ltd	Reader
150	Ted Mountbatten	Telco Manufacturer Ltd	Reader

8. To Edit a member highlight the chosen user from the table shown above and click

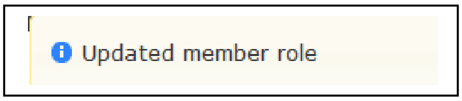


9. You will then receive the following screen;

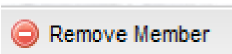


10. Make the required change and click 

11. You will then receive a confirmation message;



12. To Remove a Member from a Group, highlight the member from the table and click

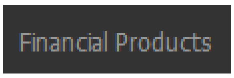


13. You will then receive the confirmation message, click 'OK' to confirm or 'Cancel' to delete.

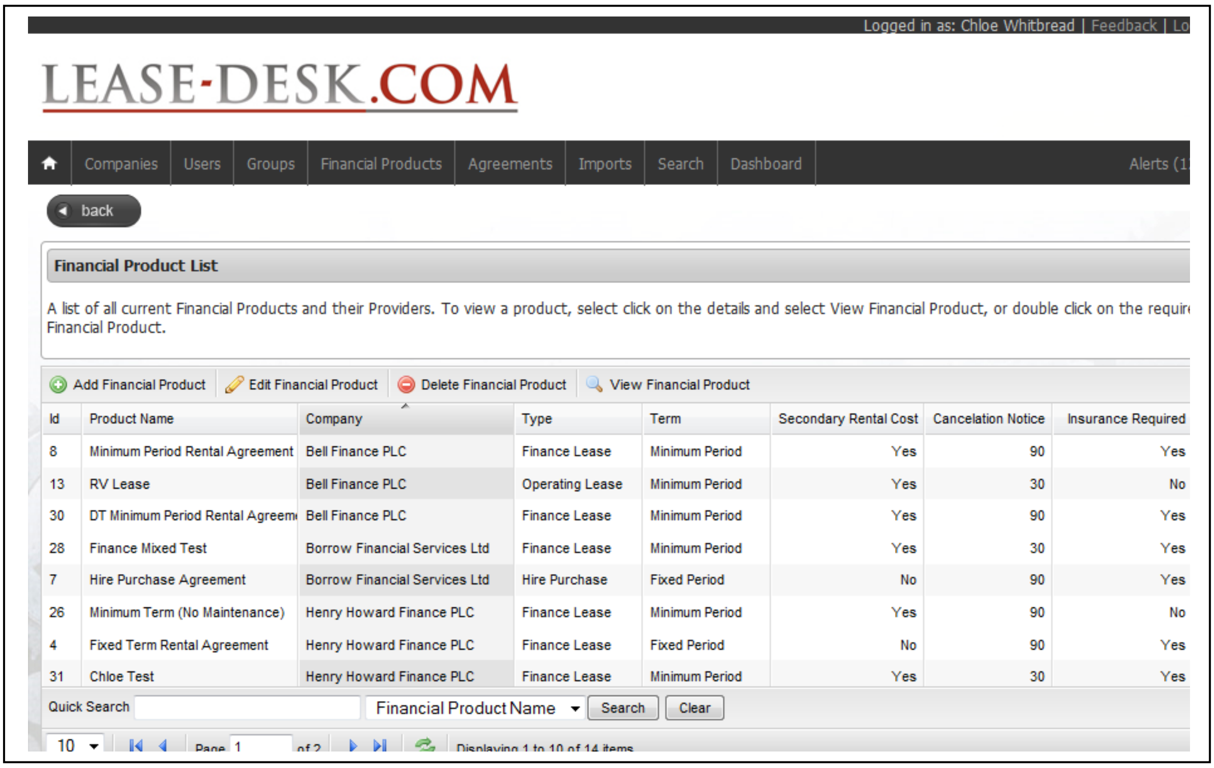
14. You will then be taken back to the main Groups List screen.

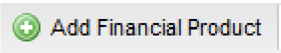
7. Financial Products Screen: Adding, Editing, Viewing & Deleting

7.1. Adding a Financial Product:

1. Select  from the top main menu.

2. You will then be presented with the main Financial Products list as indicated below;

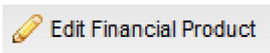


3. Click 

4. You will then be presented with the 'Add a Financial Product' screen.

5. Follow points in Chapter **3.6.1.Adding a Financial Product**

7.2. Editing a Financial Product:

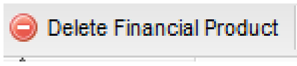
1. Highlight the required Financial Product and click 

2. You will then be presented with the 'Edit Financial Product' screen.

3. Follow process in Chapter **5.6.2. Editing a Financial Product**

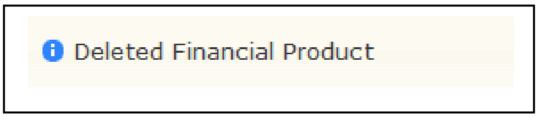
7.3. Deleting a Financial Product:

Note: If a Financial Product is associated with a Live Agreement, you will not be able to delete it.

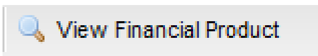
1. Highlight the required Financial Product and click 

2. You will then be presented with a confirmation message. Select OK to continue with the deletion or Cancel to cancel the action.

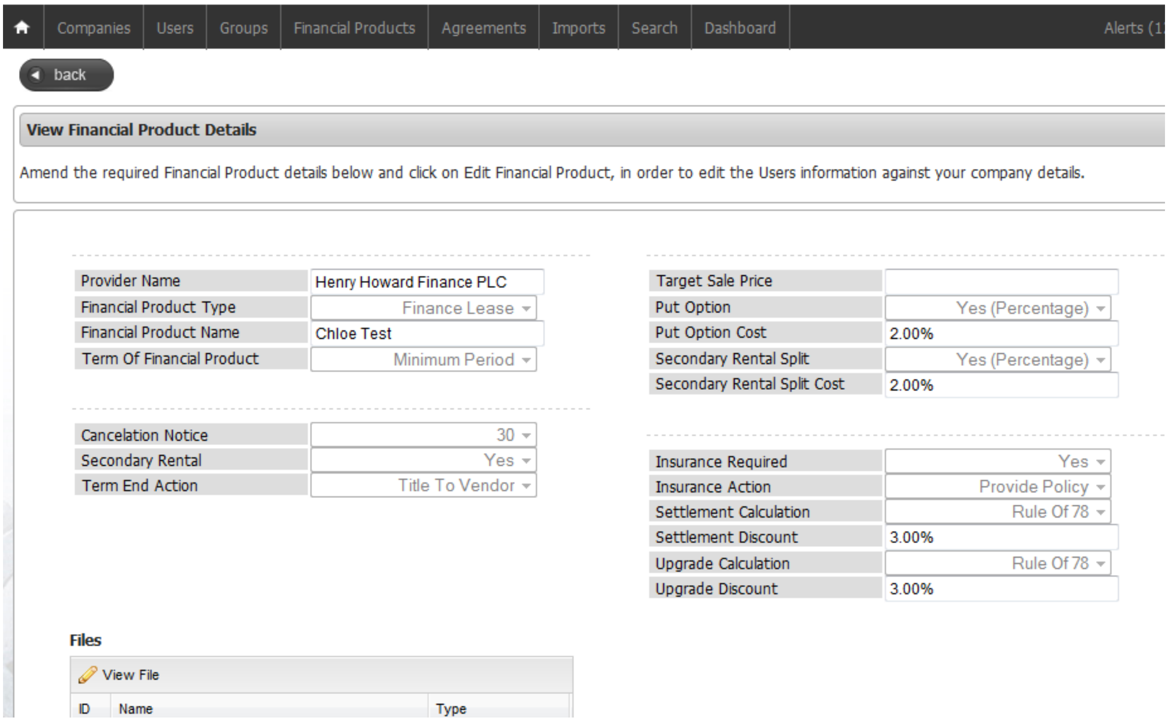
3. Once the deletion has been confirmed, you will be taken back to the main Financial Products List screen and you will be presented with the following confirmation message;



7.4. Viewing a Financial Product:

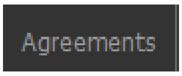
1. Highlight the required Financial Product and click 

2. You will then be presented with the View Financial Product screen as indicated below;

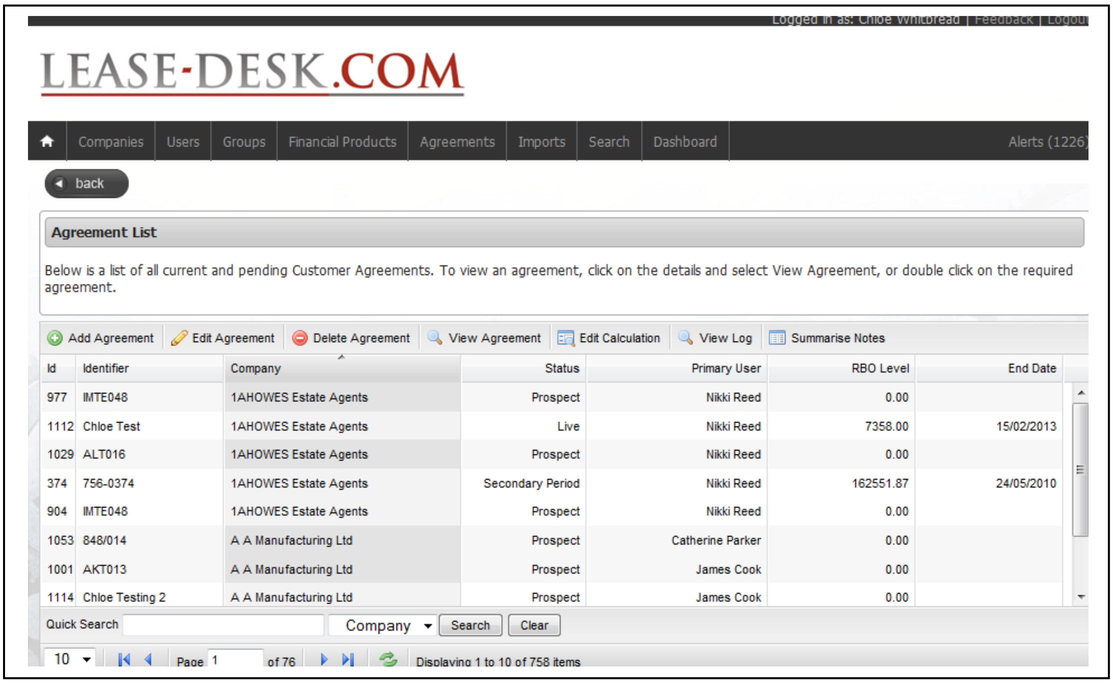


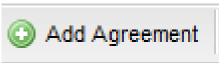
8. Agreements Screen: Adding, Editing, Viewing, Deleting and Viewing Audit Log

8.1. Adding an Agreement (Live):

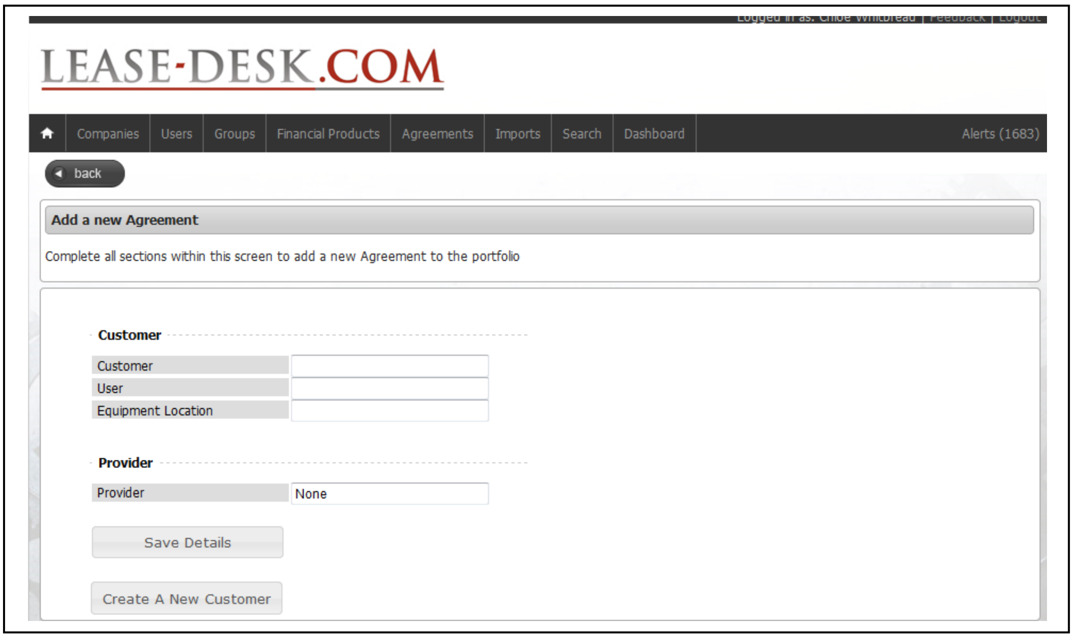
1. Select  from the top main menu.

2. You will be presented with the main agreement list screen, which details all the live and prospect agreements within the software, as per below;



3. Click 

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



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

Note: The Company, User, Vendor, Primary Users and Financial Product will need to be set up on the system prior to adding an agreement. For instructions on how to do this, follow previous chapters. Click 'Create a New Customer' to take you to the Add Company screen if the Customer is not already on the system.

Please be aware that Super Users cannot be associated with an Agreement as their primary function is to 'Edit' and maintain the system whether at the customer site or at Proctor Consulting.

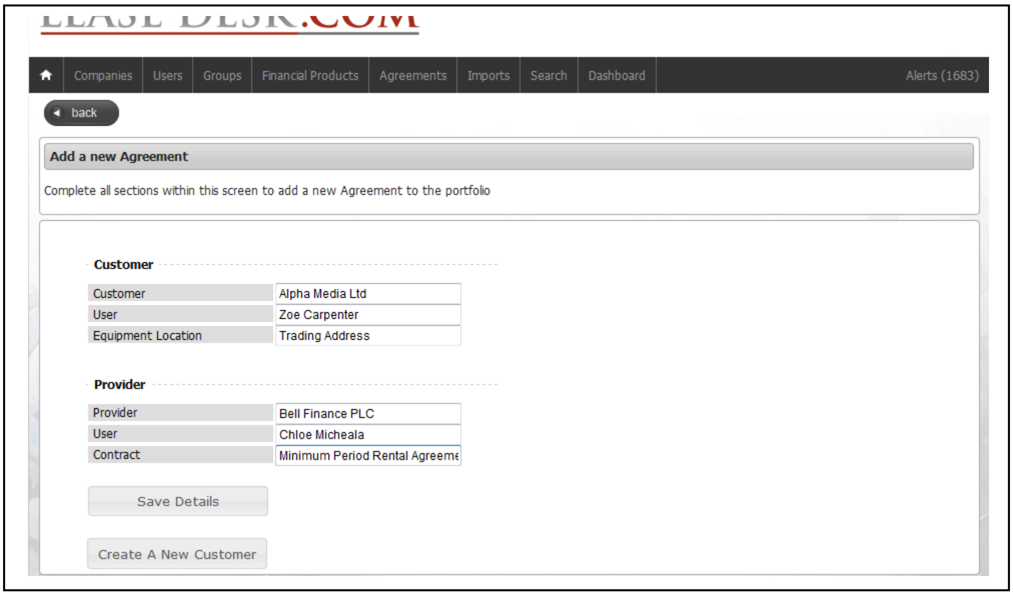
Customer:

- **Customer** (Note: start either typing customers name to bring up the list or press space)
- **User (at Customer)** Note: Follow the same above
- **Equipment Location:** This will default to the main company address but can be amended.

Provider:

- **Provider (As above)**
- **User (at Provider)**
- **Contract**

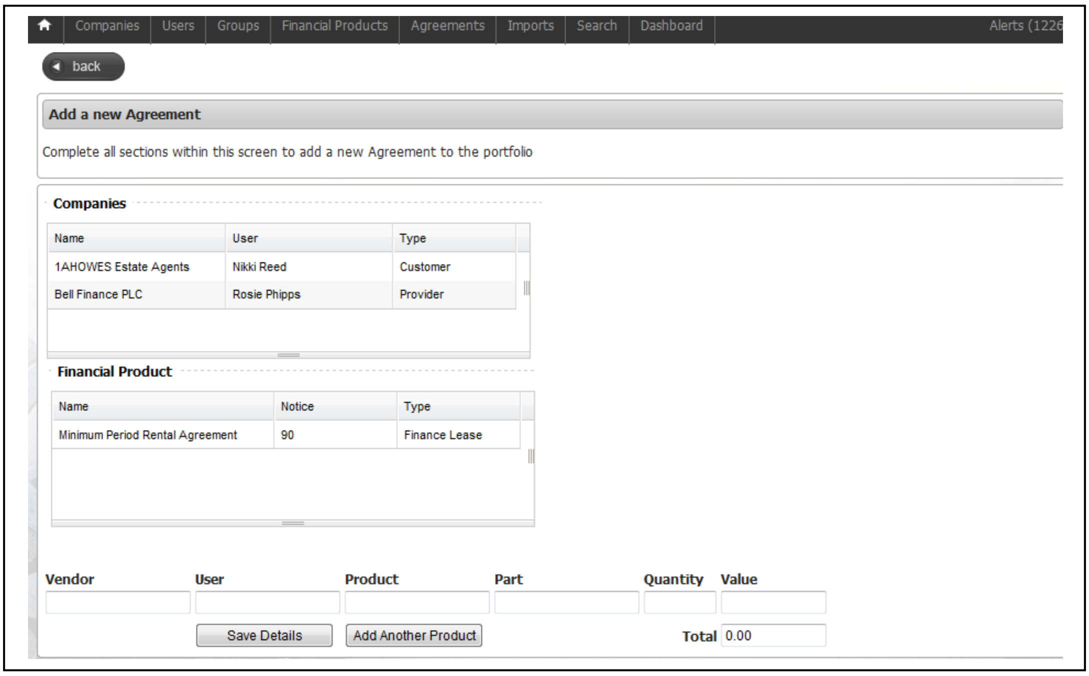
As indicated below:



Note: If there is already a proposal agreement on the system for that particular company you will receive a pop up message to indicate you of this. This is to ensure duplications are prevented. You can override this message by pressing 'Yes' as per below;

7. Then click 

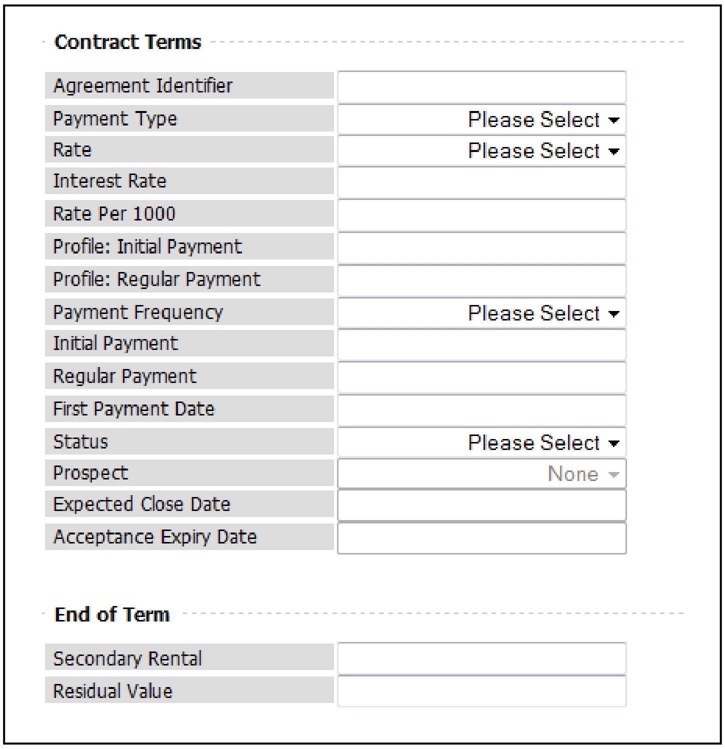
8. The companies (Provider and Customer) will then be presented in table format along with the Financial Product below, as indicated;



9. Next, complete the Vendor and User, product name or part number (the system will auto populate the product name when the Part number is inputted and vice versa), quantity and value.

10. Click Save Details if complete or Add Another Product to add an additional product (repeating previous step).

11. 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 – typically the Financial Providers reference)
- 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

Note: Lease-Desk will then calculate the initial and regular payments from the information previously added above and with the product information added at the Vendor stage.

- First Payment Date: (only applicable if live contract)
- Status: Live, Upgraded, Settled, Default, End of Term, Secondary Rentals, Dead

Note: 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 receive the following confirmation message and be taken back to the Edit Agreement page so that you can check everything that has been entered.

8.2. Adding an Agreement (Prospect):

1. Follow 8.1 on points 1-11 for ‘Adding a Live Agreement’.

Note: If using as a quoting tool and no provider is known at this stage, select ‘None’ from the Provider drop down menu.

If the product isn’t specified in detail at this point, select the default part number ‘LD001’

(Note: this may need to be set up prior to adding the Prospect Agreement)

2. When you get to the ‘Contract Terms’ (as indicated in point 14 in 8.1), enter the following information;

- 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)

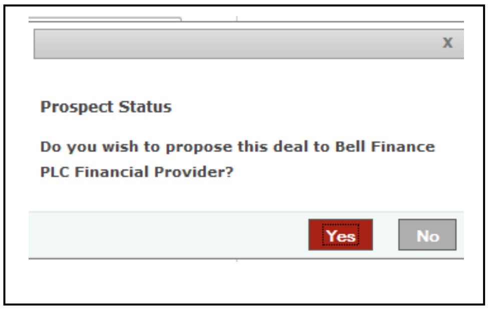
- Profile: Regular Payment (how many remaining payments after initial)
- Payment Frequency: Monthly, Quarterly or Annually
- Status: Prospect
- Prospect: None, Quote, Proposed, Referral, Accepted, Declined, Purchase Order, Sent for Payment, Win.
- Expected Close Date
- Acceptance Expiry Date:(only applicable when the agreement is in the Accepted, Purchase Order, Sent for Payment or Win stage.

3. Then click on 

4. You will then be taken back to Edit Agreement page List and will be presented with the following confirmation message;

8.3. Proposal Automation:

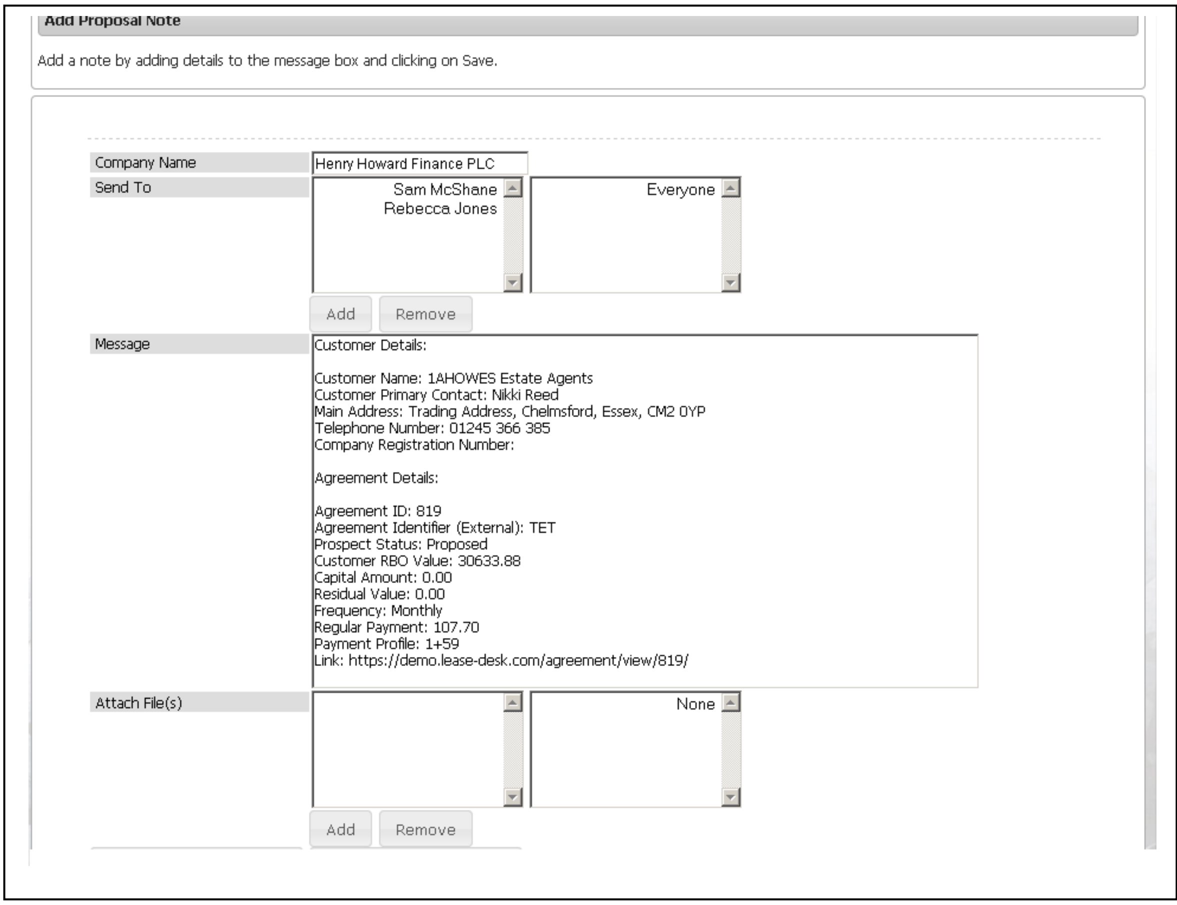
1. When you have saved a Proposed Prospect agreement a pop up screen will appear asking if you would like to propose this deal to the chosen financial provider, as shown below:



2. Select No, if you wish to wait before sending the information out or click on Yes, to take you through to the 'Add Proposal Note' screen on the following page.

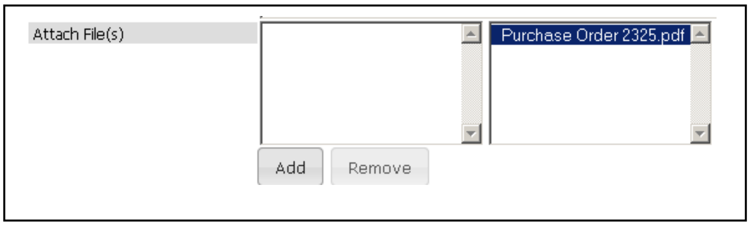
Note: If you wish you send to funder at a later date, on the main agreement page select the following icon which will bring up the same screen as below;

3. The Company Name box at the top of the screens details the Financial Provider that holds the agreement.



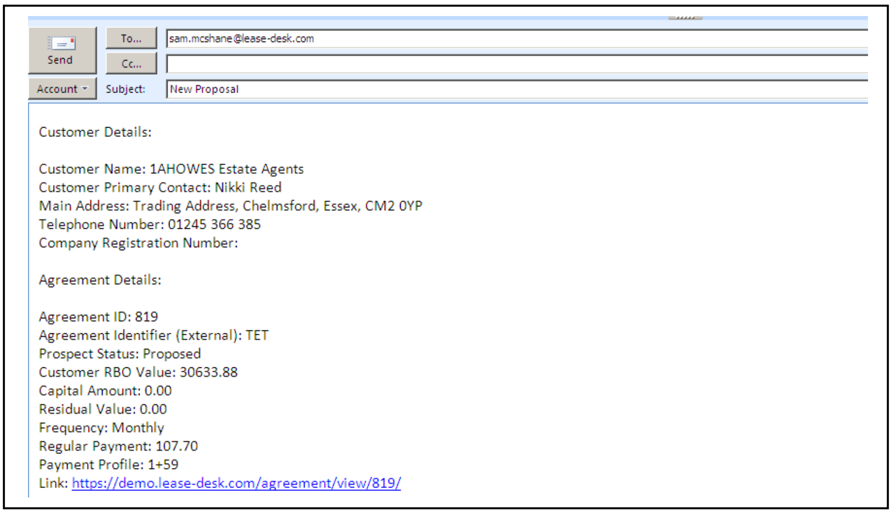
5. In the Message box all of the agreement information is detailed, separated into the following sections:
    - Customer Details
    - Agreement Details
    - Vendor Details
    - Product Details

6. If there are any files attached to the agreement these can also be added to the email by highlighting the file and selecting the add button. This will then show as a link on the email that the recipients can download. **(Note: you do not have to have log in details to lease-desk.com to download the files).**



7. After completing all of the above you will come to two buttons at the bottom of the page 

, clicking on the saved details button will save all of the information as a note that you can access from the agreements page by going to the Notes table. Clicking on Open in Email Client will take you to a completed email in outlook, detailing all of the information selected in the above stages, shown on the following page:

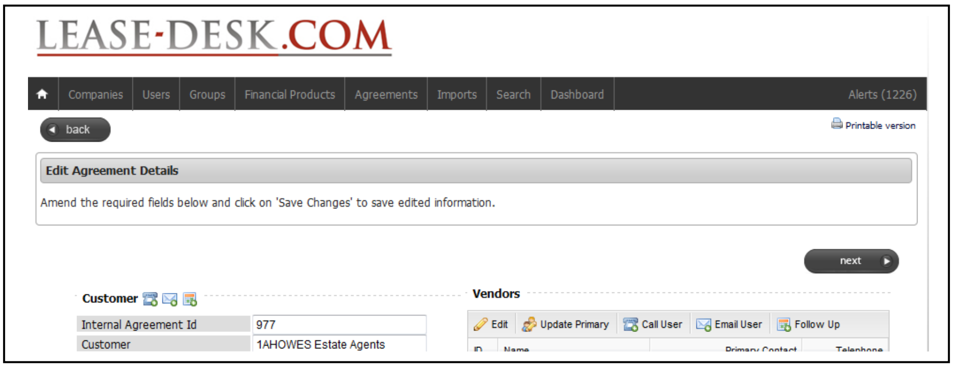


8.4. Editing an Agreement (Live or Prospect):

1. From the main Agreement List, highlight the required Agreement.

2. Click 

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

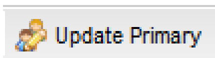


8.4.1 Editing a Vendor:

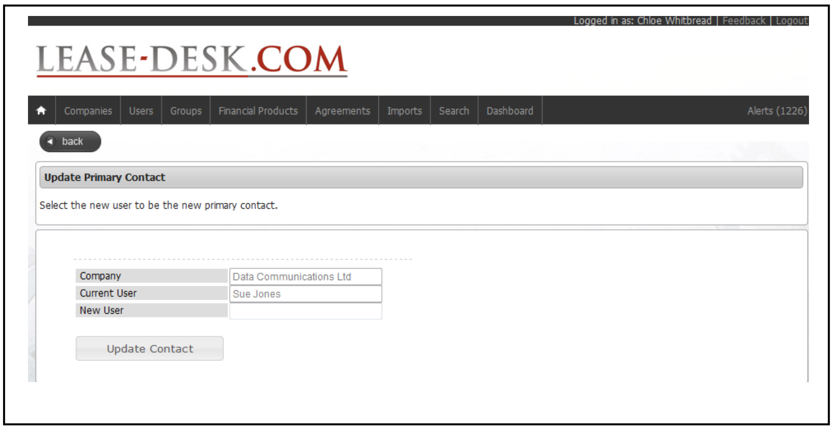
1. To Edit a Vendor, highlight the required Vendor from the Vendor Table within the ‘Edit Agreement screen.

2. Click  and follow chapter **6.2. Editing a Company:**

8.4.2 Updating Primary Vendor:

1. Highlight the Vendor User and click on 

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



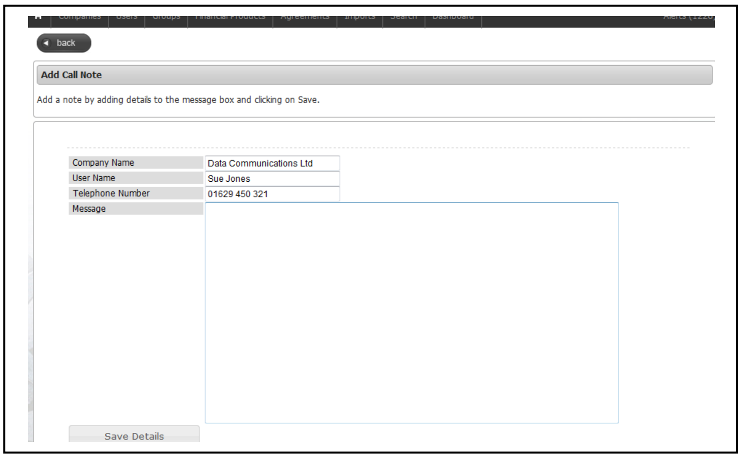
3. Select the New User (note the required person needs to be already on the system).

4. Click 

8.4.3 Calling or Emailing a Primary Contact:

1. Within the Financial Provider, Vendor or Customer tables, highlight the required user and then click on the required Option;

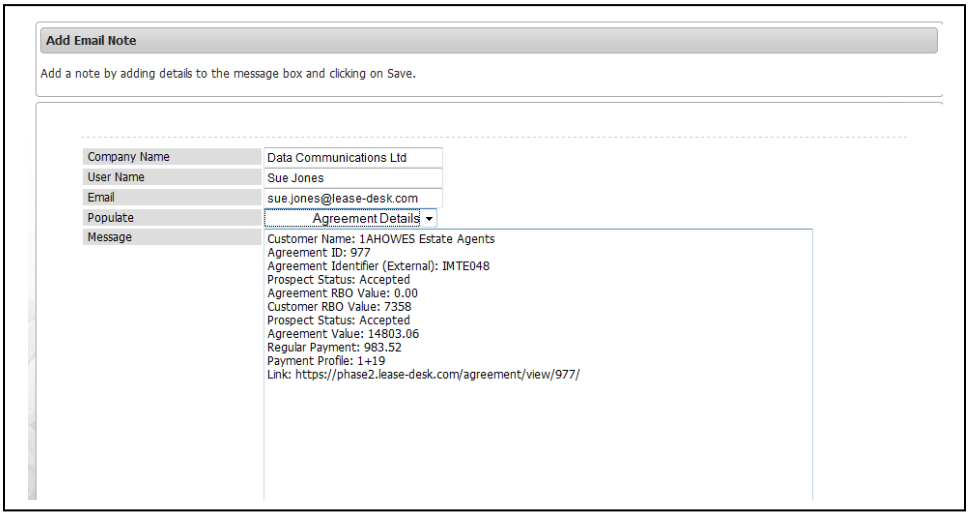
2. If you have selected the 'Call User' option, you will then be presented with the screen below



3. Complete the details and click 

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

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

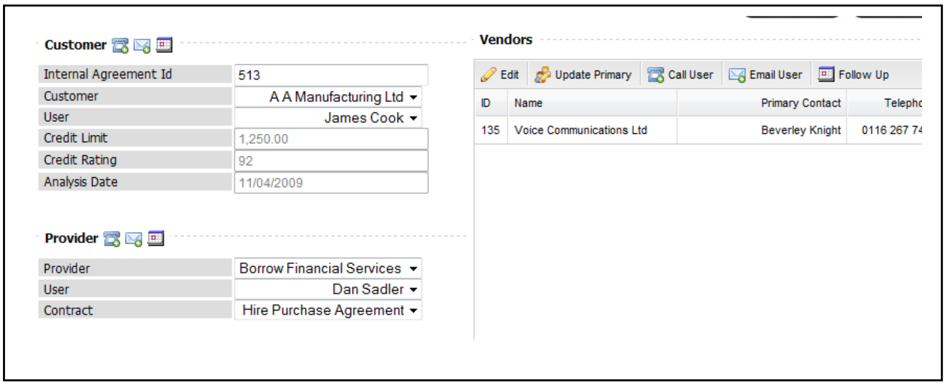


6. Select either ‘Blank’ or ‘Agreement Details’ from the ‘Populate’ dropdown list.

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

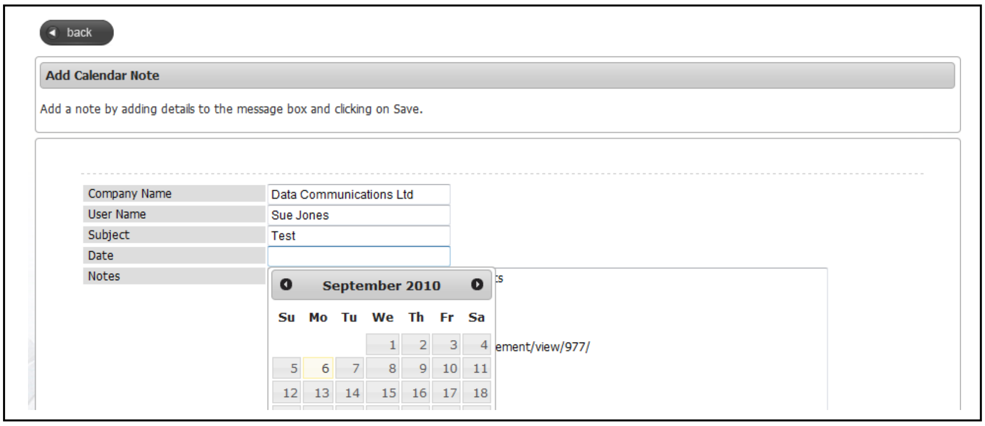
8.4.4 Creating Follow Ups:

1. Highlight the contact required from either the Financial Provider, Customer or Vendor tables as indicated below;



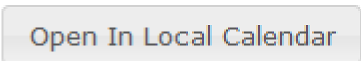
2. Click on 

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



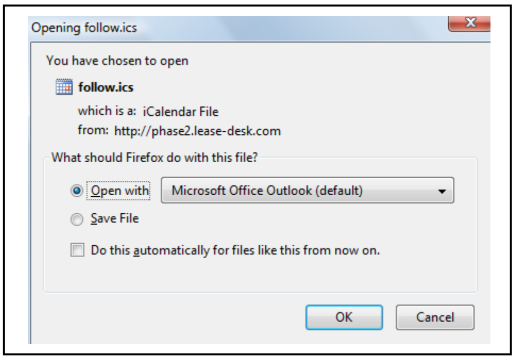
4. Enter a ‘Subject’ line and then click in the ‘Date’ box to bring up a calendar.

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

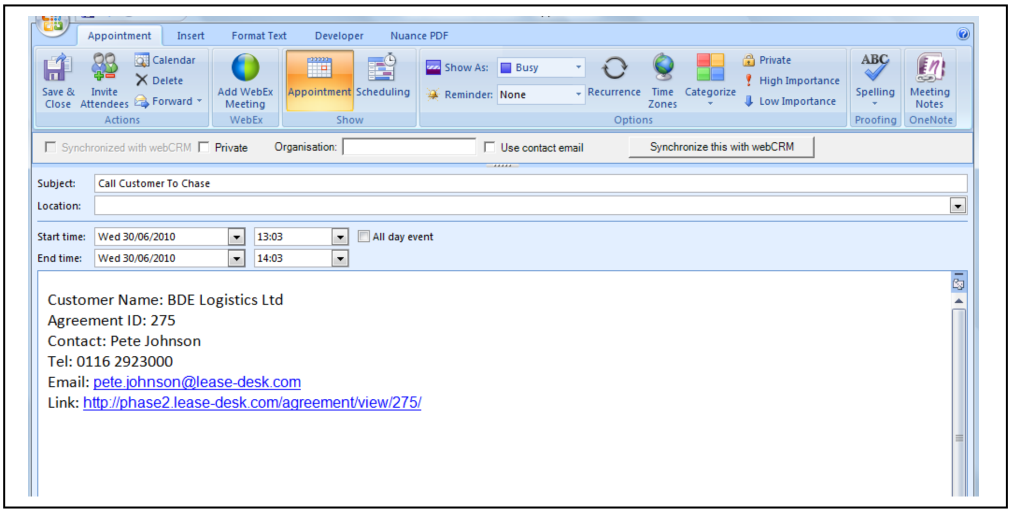
6. Click 

to open up your email.

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



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



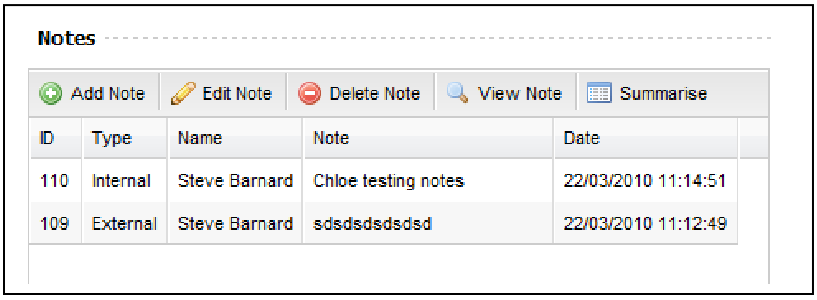
9. Click ‘Save & Close’ to then add to your outlook calendar as a reminder.

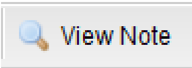
8.4.5 Adding, Viewing and Deleting a File:

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

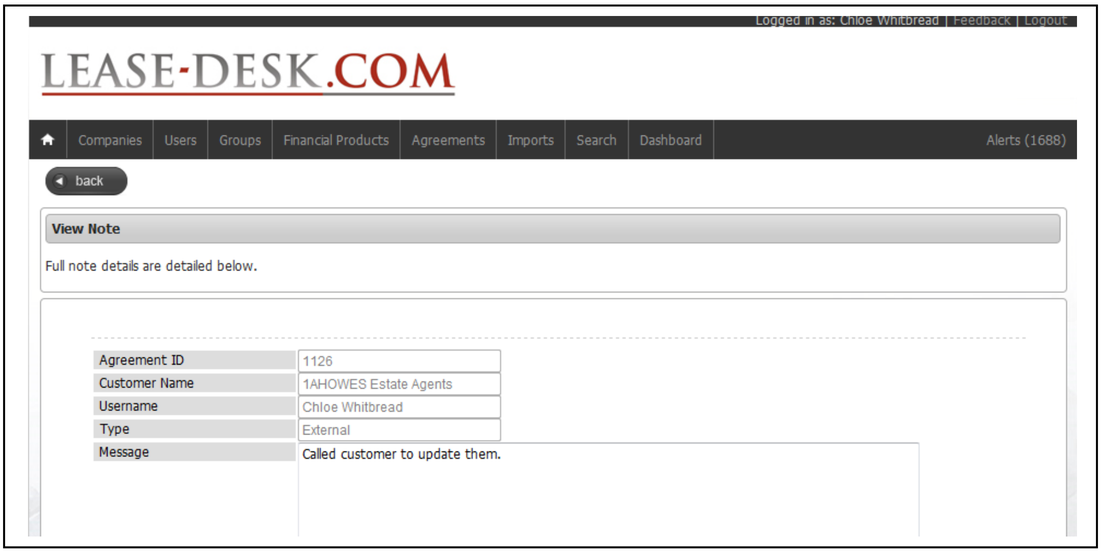
8.4.6 Viewing a Note:

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



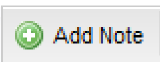
2. Click 

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

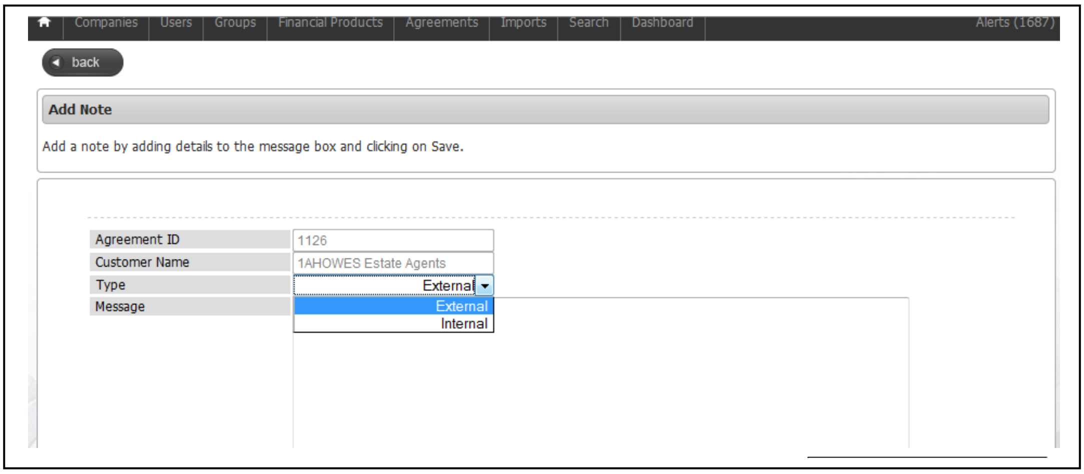


8.4.7 Adding a Note:

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

2. Click 

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



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

Note: An external note will generate an email to all users that can view the particular agreement and can be seen by everyone. An internal note can only be viewed by the users that can view the particular agreement within the user's organisation.

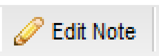
4. Type your message into the blank box

5. Click 

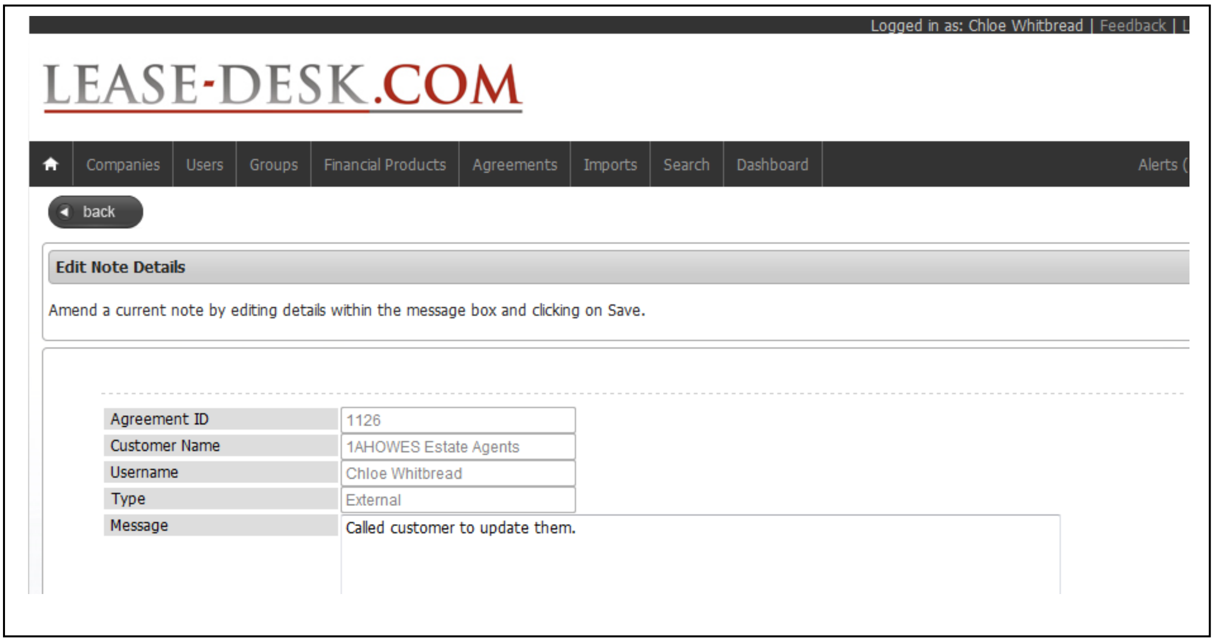
5. You will then be taken back to the main 'View Agreement' screen.

8.4.8 Editing a Note

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

2. Highlight the required note and click 

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



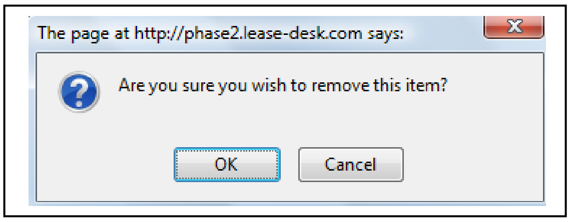
4. Amend the note as required and then click Save Changes

8.4.9 Deleting a Note:

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

2. Highlight the required note and click on Delete Note

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



4. Select ‘OK’ to delete or ‘Cancel’ to cancel the request.

8.4.10 Summarising Notes:

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

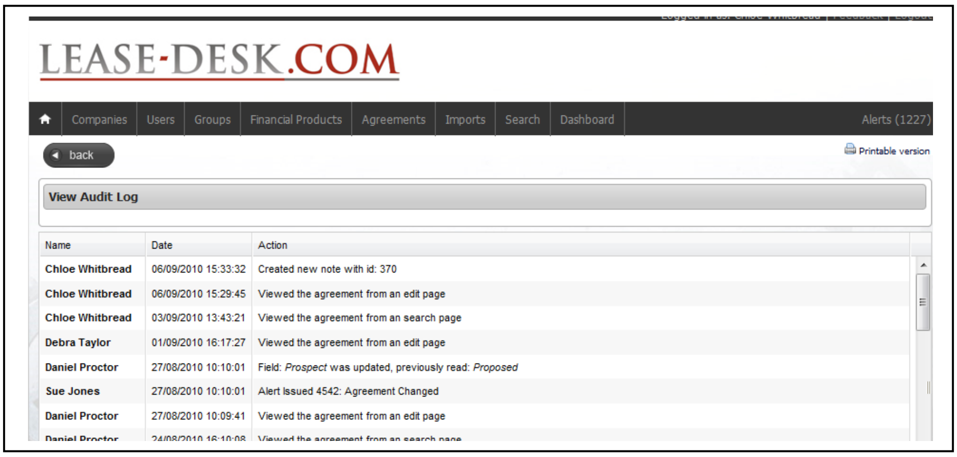
Summarise

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

8.4.11 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 then click View Log to receive the following screen;



or

B) Select the Agreement required from the Agreement list and click 

and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

Audit Log

Name	Date	Action
Noah Ark	28/04/2010 16:12:59	Created new note with id: 158
Noah Ark	28/04/2010 16:08:17	Created new note with id: 157
Noah Ark	28/04/2010 15:58:18	Viewed the agreement from an view page
Debra Taylor	28/04/2010 15:02:28	Viewed the agreement from 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*

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

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

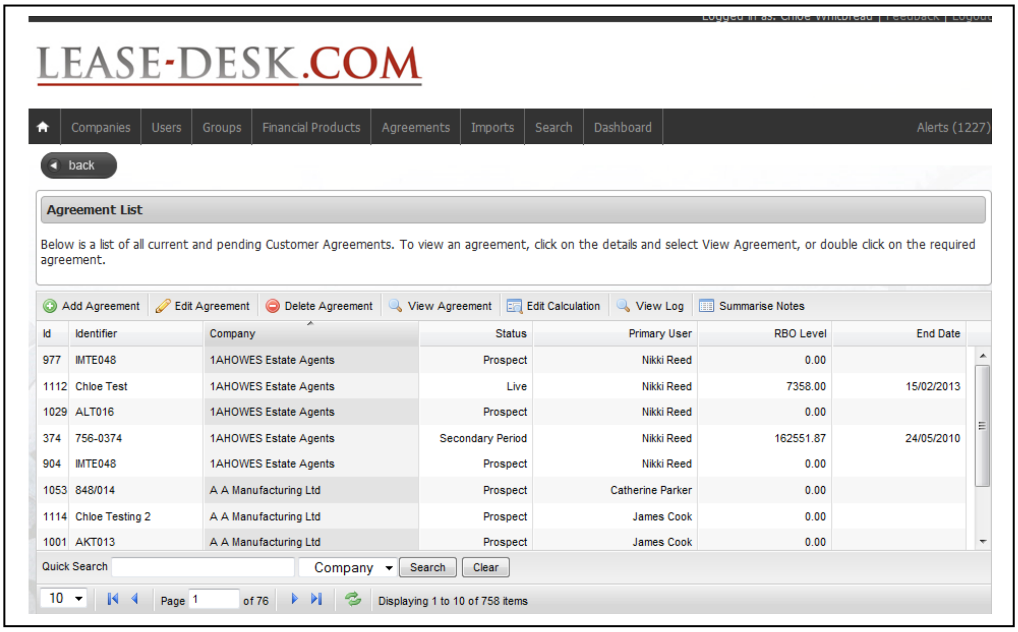
8.4.12 Adding and Deleting a Product:

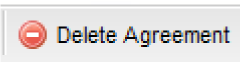
1. To Add or Delete a Product, follow chapter **3.5. Adding, Editing and Deleting Products**

8.5. Deleting an Agreement:

Note: Agreements will delete everything related to them (including the audit log).

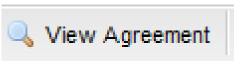
1. Highlight the required Agreement from the main Agreement Lists screen as indicated below;



2. Click 

8.6. Viewing an Agreement:

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

2. Click 

3. You will then be presented with the full View Agreement Details screen (which mirrors the Edit Agreement screen previously shown without the editing facilities), as indicated on the following page;

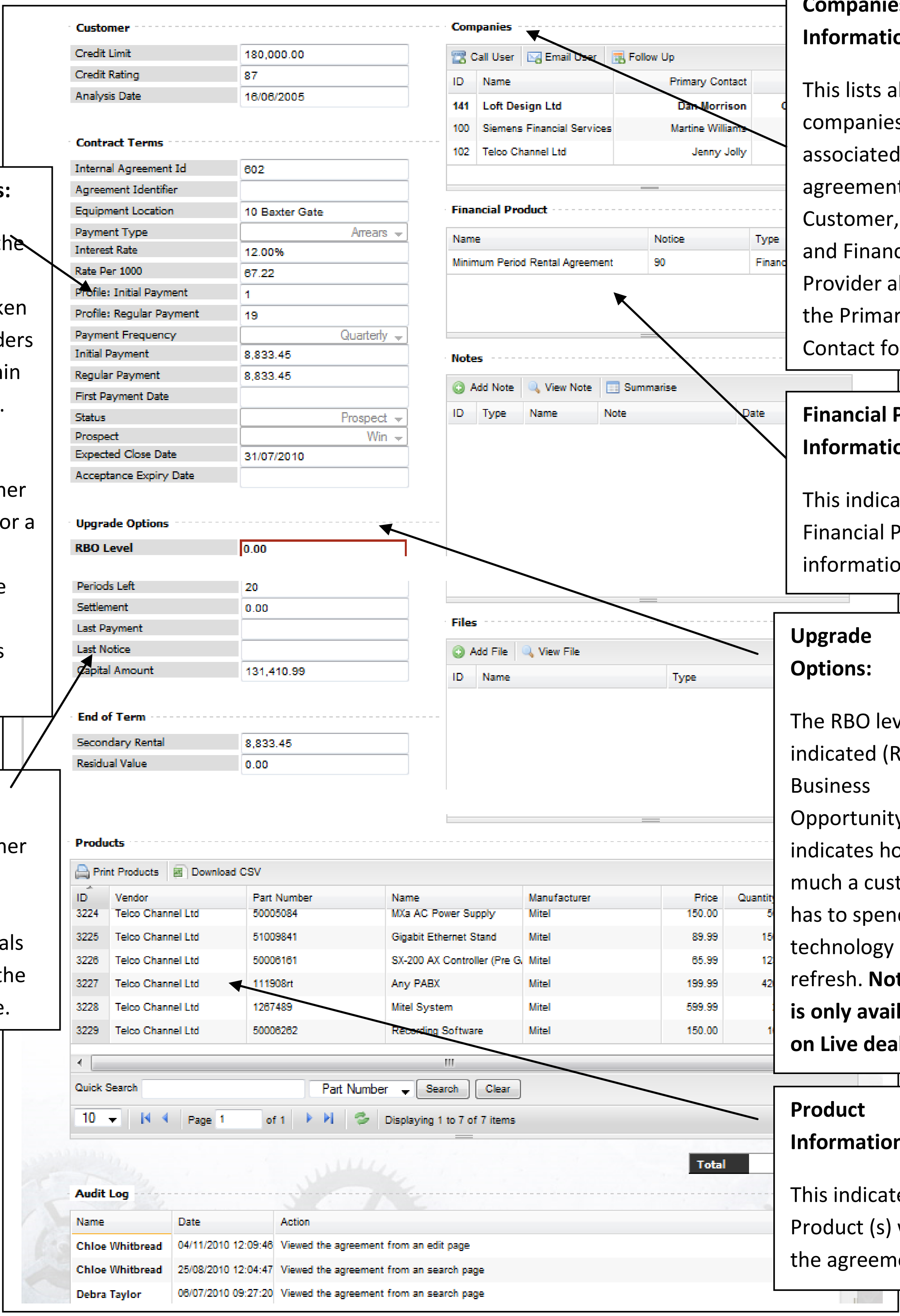
Companies Information:

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.

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.



Financial Product Information:

This indicates the Financial Product information

Upgrade Options:

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

End of Term:

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

Product Information:

This indicates the Product (s) within the agreement.

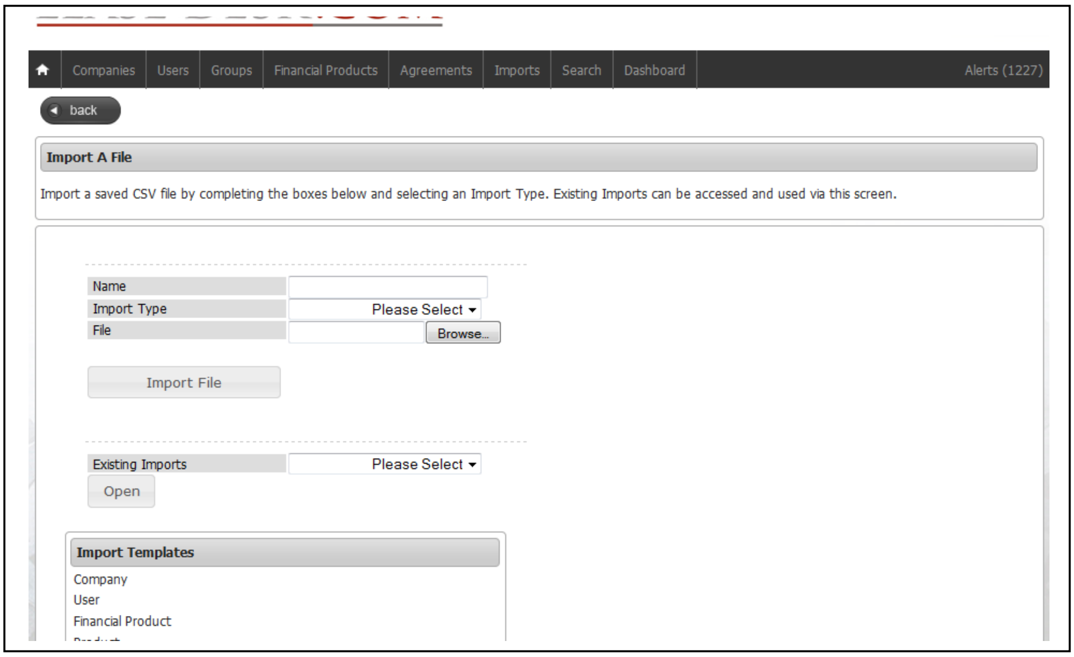
9.0. Imports

1. Lease-Desk has an Import functionality allowing users to quickly import information using a pre-saved CSV file matching the headers required for each of the imports, for example, Company, Users etc.

2. To Import a file, firstly select 

from the top main menu.

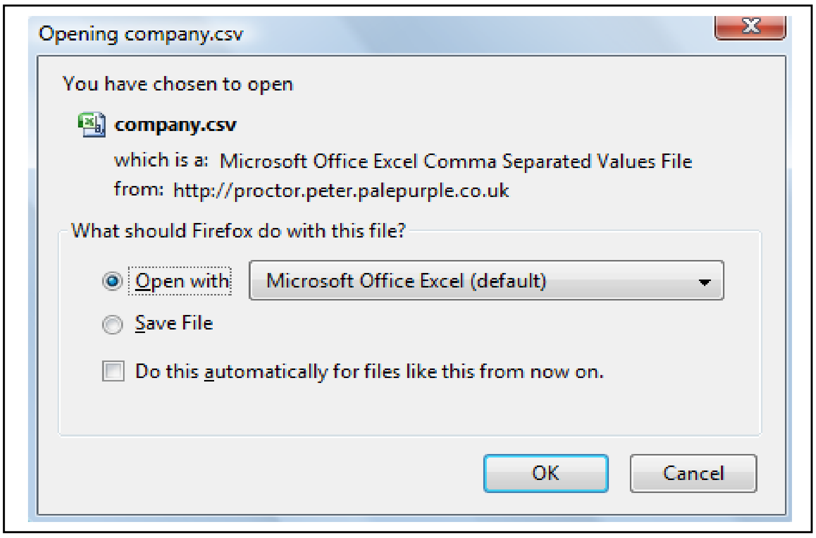
3. You will then be presented with the 'Import a File' screen as indicated on the following page;

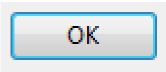


4. There are six different types of imports available within Lease-Desk. You will find the Sample Import templates on the 'Import a File' screen as indicated above. To select one, click on the title, for example 'Company'.

   Note: Always ensure you follow the import order specified on the Import a File page as above, i.e. Company first, and then Users, otherwise import will fail.

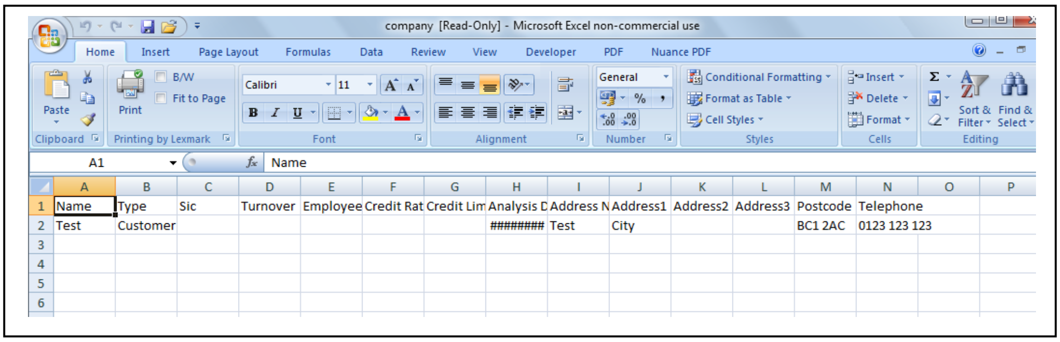
5. You will then be presented with the following pop up screen for opening the CSV template;



6. Click 

to open with Excel

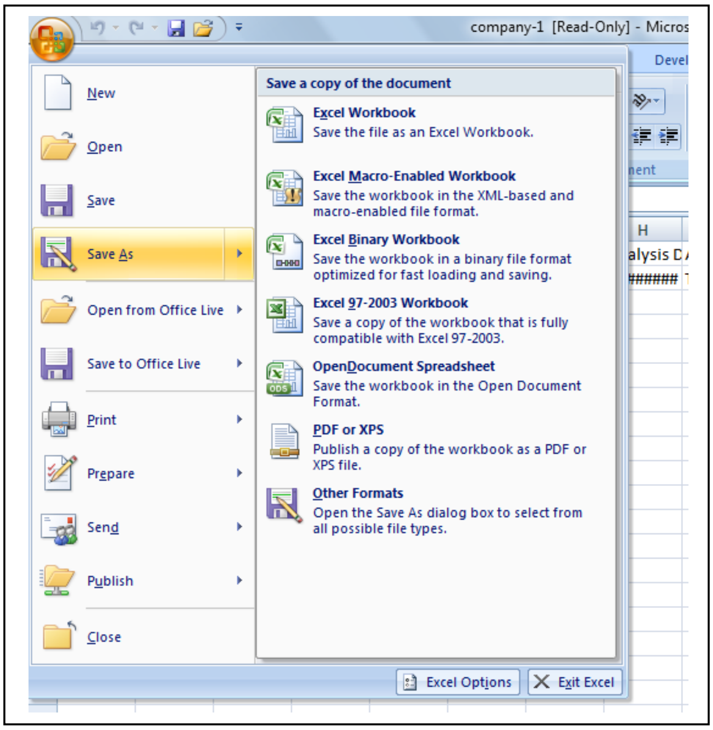
7. You will then be presented with the template containing the headers required for the import, as per below;



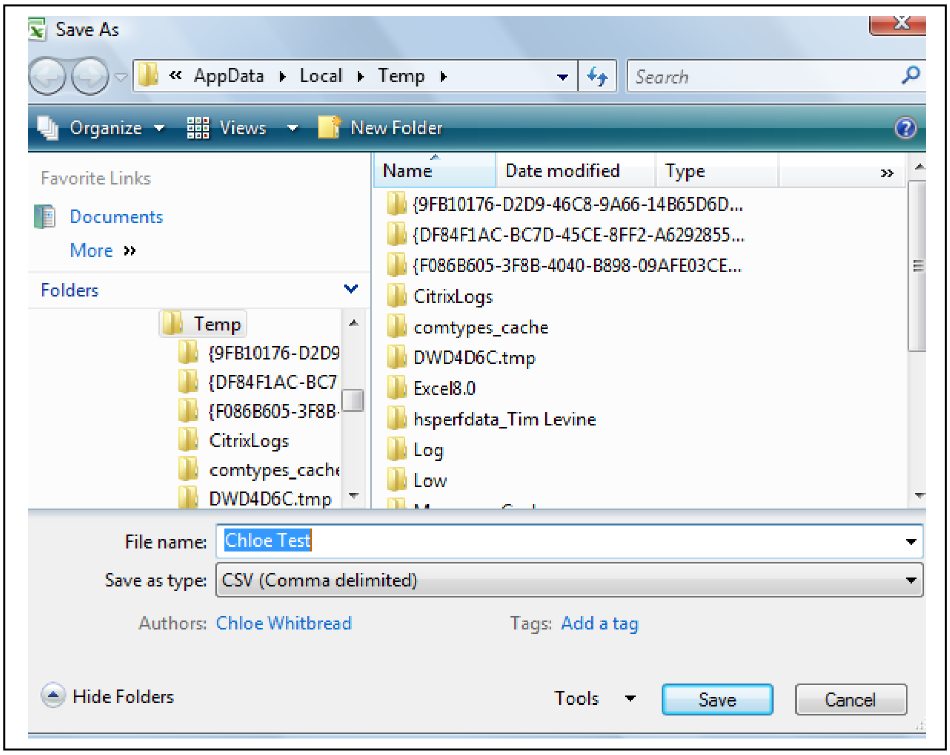
8. Add the import data for the specified import, following the template headings and test data.

9. Highlight the second line of test data and then click on delete (to ensure the test data doesn't get imported).

10. Once completed, click on 'Save As' as below;



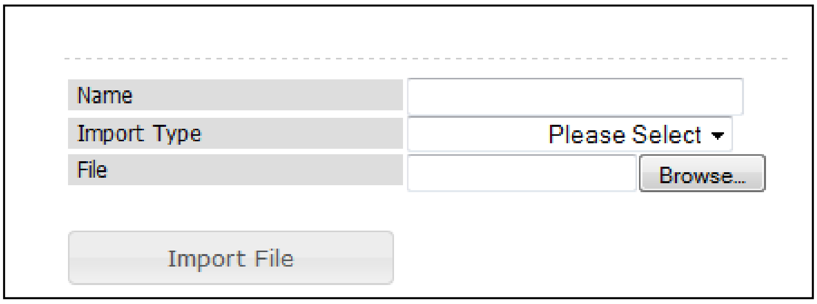
11. Enter a file name and save as a CSV file to your PC, as per below;

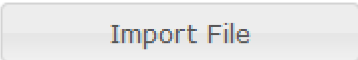


12. Go back to the 'Import a File' screen as indicated previously, to import your previously saved CSV File.

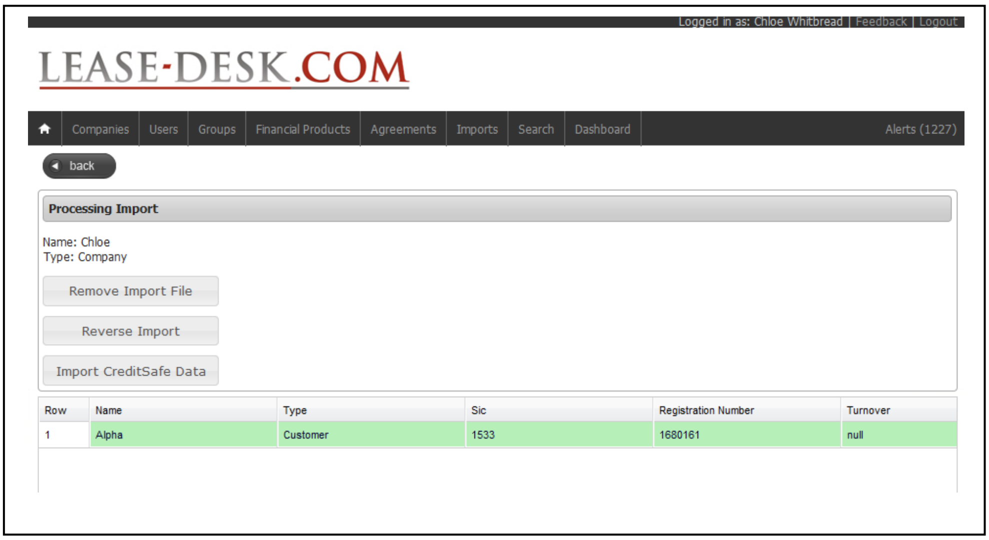
13. Fill in the following details;

- **Name**
- **Imports Type** (from drop down menu, i.e. Company, User)
- **File:** Click on 'Browse' to search for the previously saved CSV file.

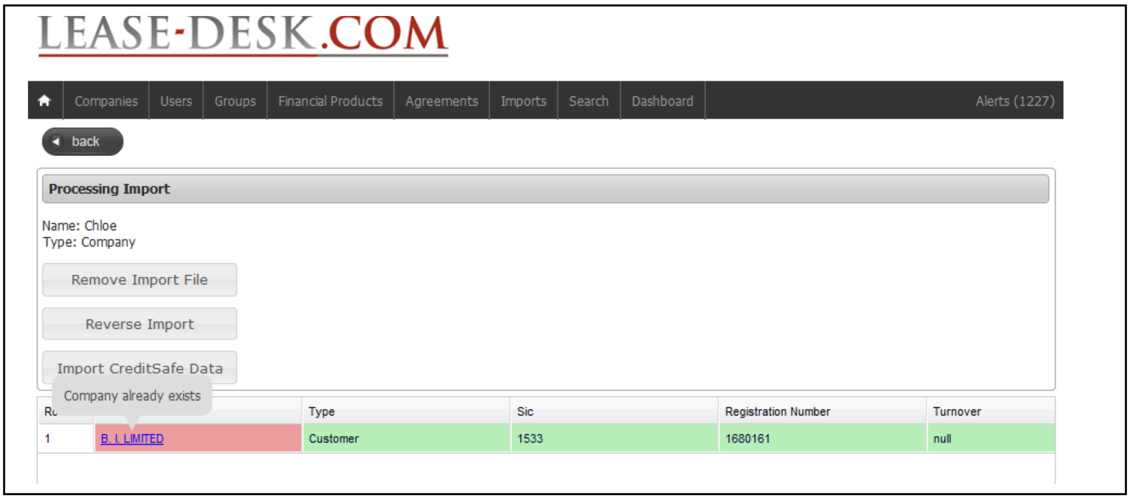


14. 14. Click 

16. You will then be presented with the 'Processing Import' page as indicated below;



17. If the import data is correct and ready for the full import, all areas will appear in green as above. If there are any duplications or errors, the problem areas will appear in red, hover over the red box with your mouse to receive the explanation, as per below;



18. To edit the incorrect or duplicated data in red, click on the information and re-enter.

19. Then click ‘Save’

20. To remove the import, click on Remove Import File

21. To reverse the import, click Reverse Import

21a. When you click on ‘Reverse Import’ you are taken to a new screen which then scans the system for matches and then displays the total per row and the ID of the result it will remove. You then need to select ‘Delete Data’ to complete the reverse.

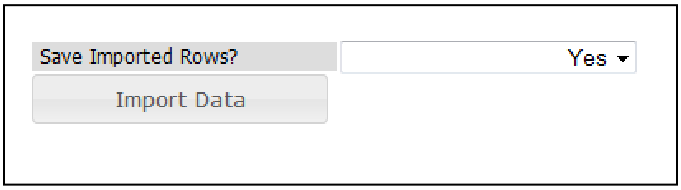
Note: You can only reverse an import if it has been imported onto the system previously.

The Delete only works on the following rules;

- Only one ID per row will be deleted on each delete run
- It will delete the highest matching ID within the system
- The Delete run follows the standard pattern, i.e. users cannot be deleted if attached to an agreement

22. To import the Credit Safe data using the XML, click Import CreditSafe Data

22. To carry on with the import, from the drop down menu 'Save Imported Rows?' as indicated below, select Yes to store the imported data for later use or select No to remove once imported.



23. To complete the import, click 

24. You will then be taken back to the main imports screen

25. Continue the above process for every type of import required

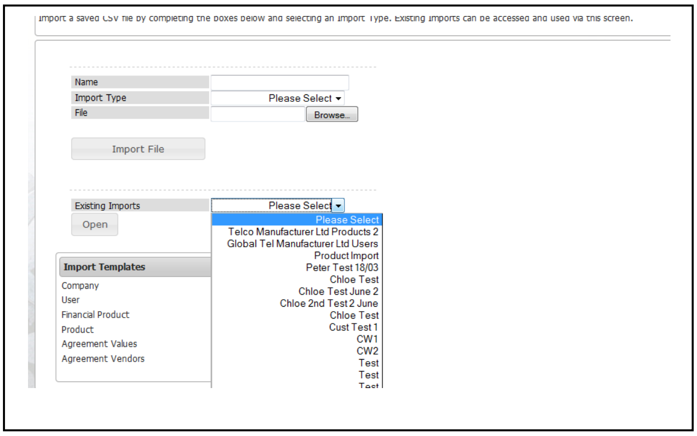
9.1. Using an Existing Import:

1. Go to 

from the top main menu.

2. You will be presented with the main 'Import a File' screen as indicated previously.

3. Go to the 'Existing Imports' dropdown menu and select one of the imports, as indicated below;



4. Click Open

5. You will then be presented with the existing import data.

6. Complete the following details;

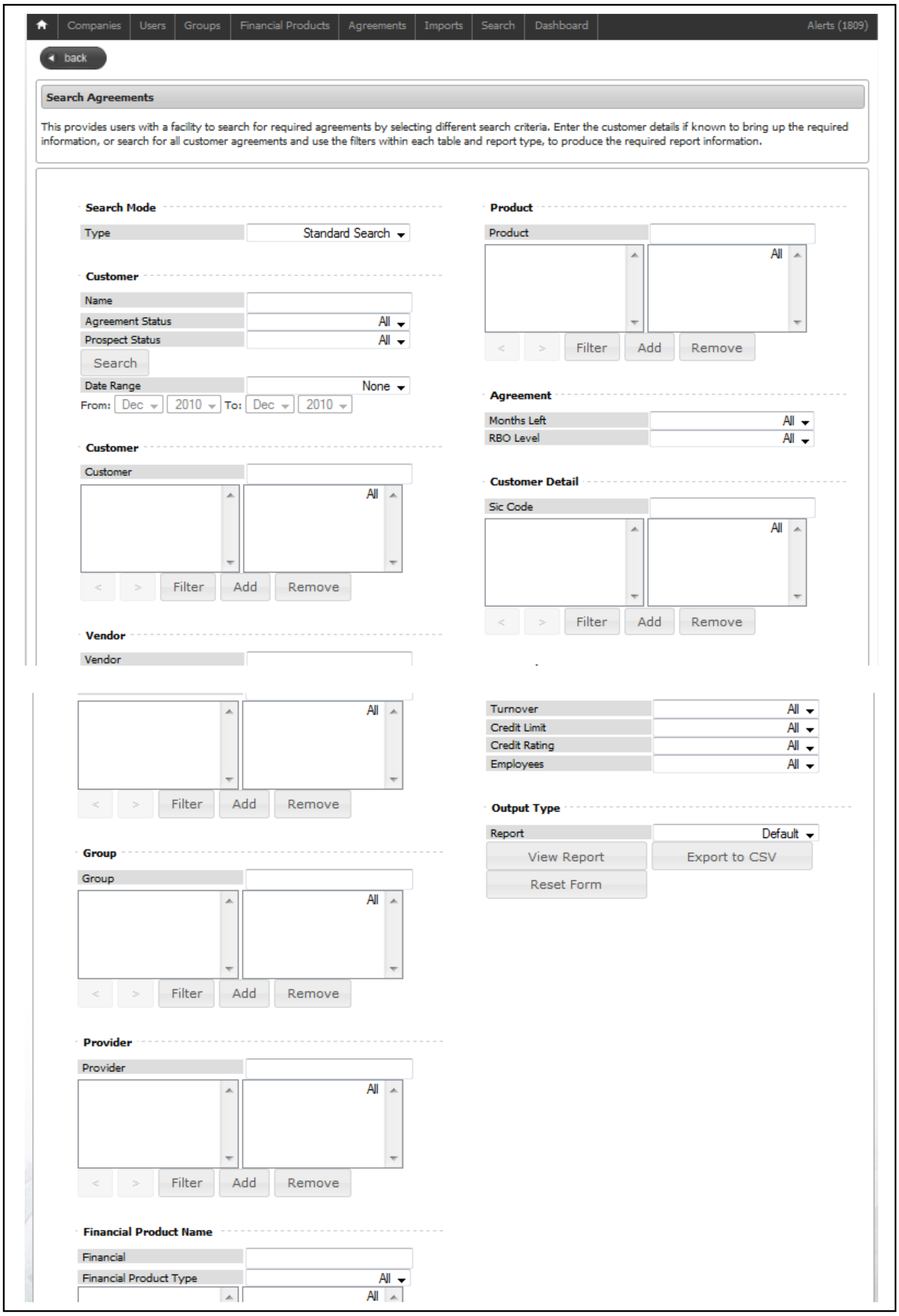
   - Overwrite Company: Type the name of the company that you wish to add the import to (if it is a different company to the one on the original import), or No if not. (This function is only available when viewing a Product Import.)
   - Save Imported Rows: As previously shown, Yes to save the new import, No to remove once actioned.

7. Click Import Data to complete import

10. 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 in two parts;



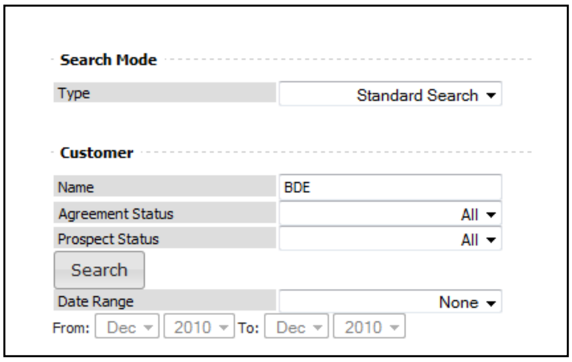
1. The Search Agreements screen, allows you to search for all agreement information that you have access to (determined by role type), by selecting the different filters required.

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

3. To remove any data selected, click 

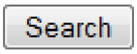
10.1. Searching for Specific Customer Agreement Information:

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.

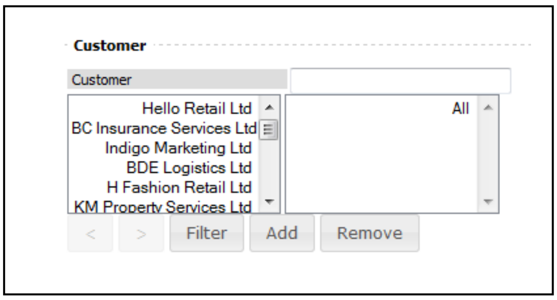


2. Complete the following details if required/known or keep as All;

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

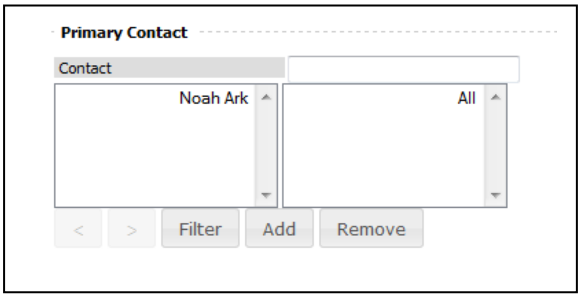
3. Click 

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



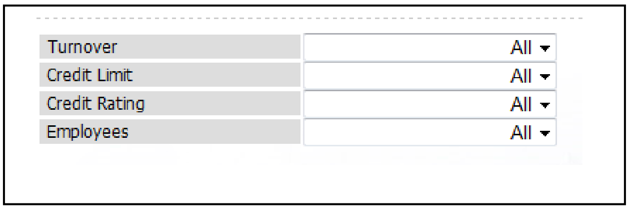
5. To include any of the produced data, within each table, highlight the required data, i.e. Primary Contact, and then click Add

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

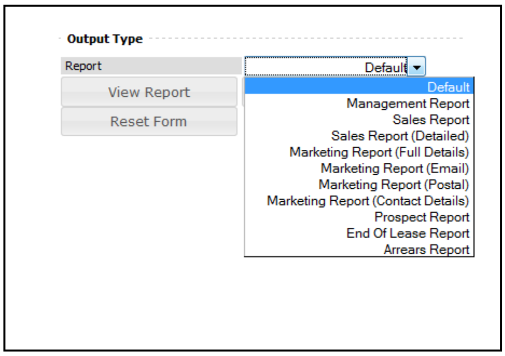


7. Carry on with each table required, following the previous step.

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



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



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

1. **Default:** ID, Identifier, Company, Status, Primary User, RBO Level, End Date

2. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.

3. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.

4. **Sales Report (Detailed):** ID, Agreement Status, Customer Name, Equipment location, Provider Name, External ID, Term, Regular Payment, RBO Level, Settlement Figure, Months Remaining & Capital Amount.

5. **Marketing Report (Full Details):** With all details listed below.

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

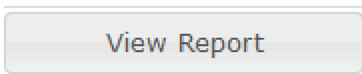
7. **Marketing Report (Postal):** As above, minus email but with full address details.

8. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the ‘Output Type’, and select a report type from the drop down menu.

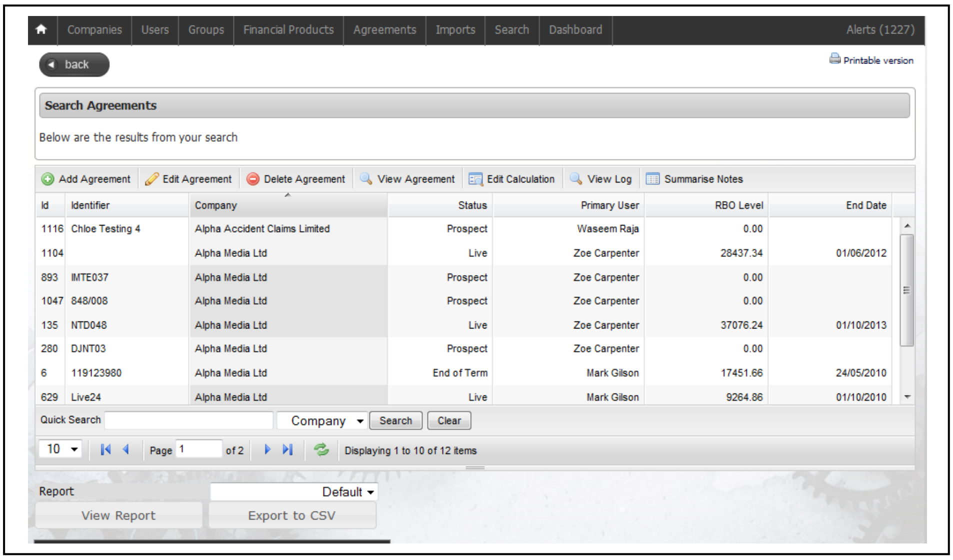
9. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

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

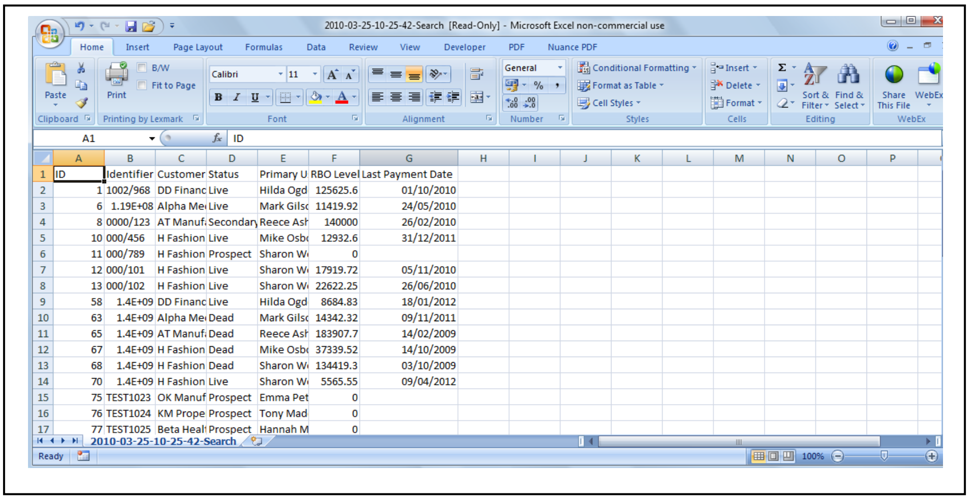
11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

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

to receive the following page;



or **Export to CSV** to view in CSV format as per the following page;



10.2. Searching for all Customer Agreement Information:

1. From the main ‘Search Agreements’ screen as indicated previously, leave the Customer name field blank and Status and Prospect Status set to ‘All’

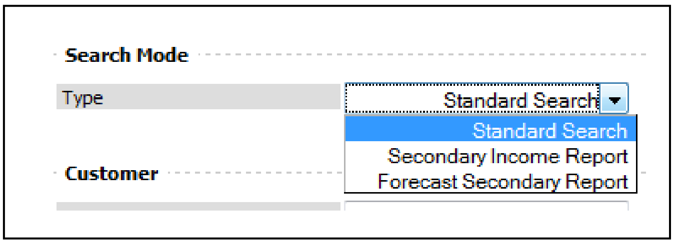
2. Click **Search**

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

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

10.3. Changing the Search Mode:

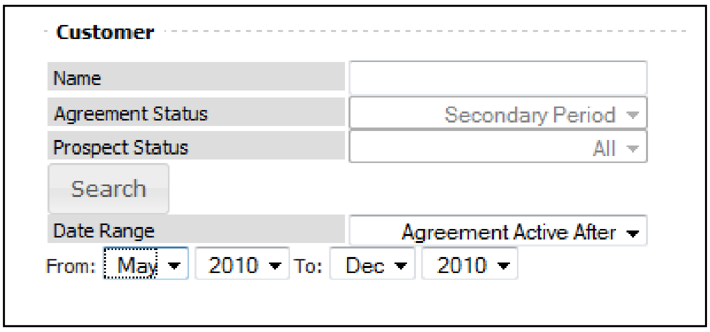
1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;



10.3.1 Secondary Income Report

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

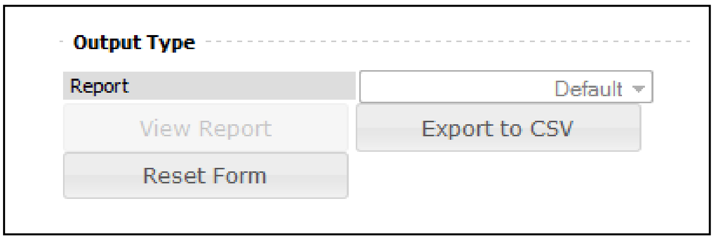
2. Next, select the date range that you wish to search for, as indicated below.



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

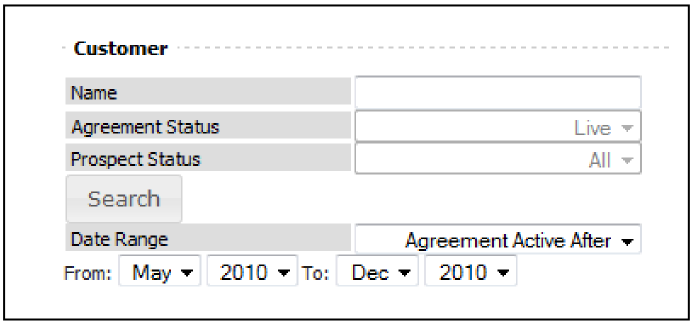
4. Note: This report type is only viewable via CSV format. To view the data, click on

as indicated below;



10.3.2 Forecast Secondary Report

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

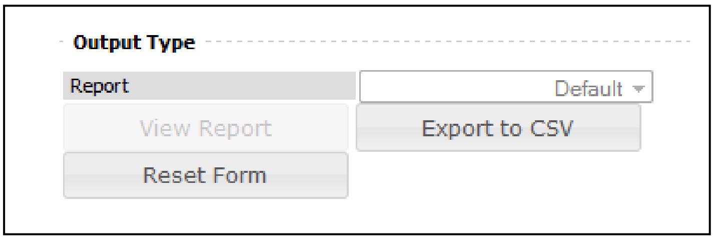


2. Next, select the date range that you wish to search for, as indicated below.

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

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

as indicated below;



11. Dashboard:

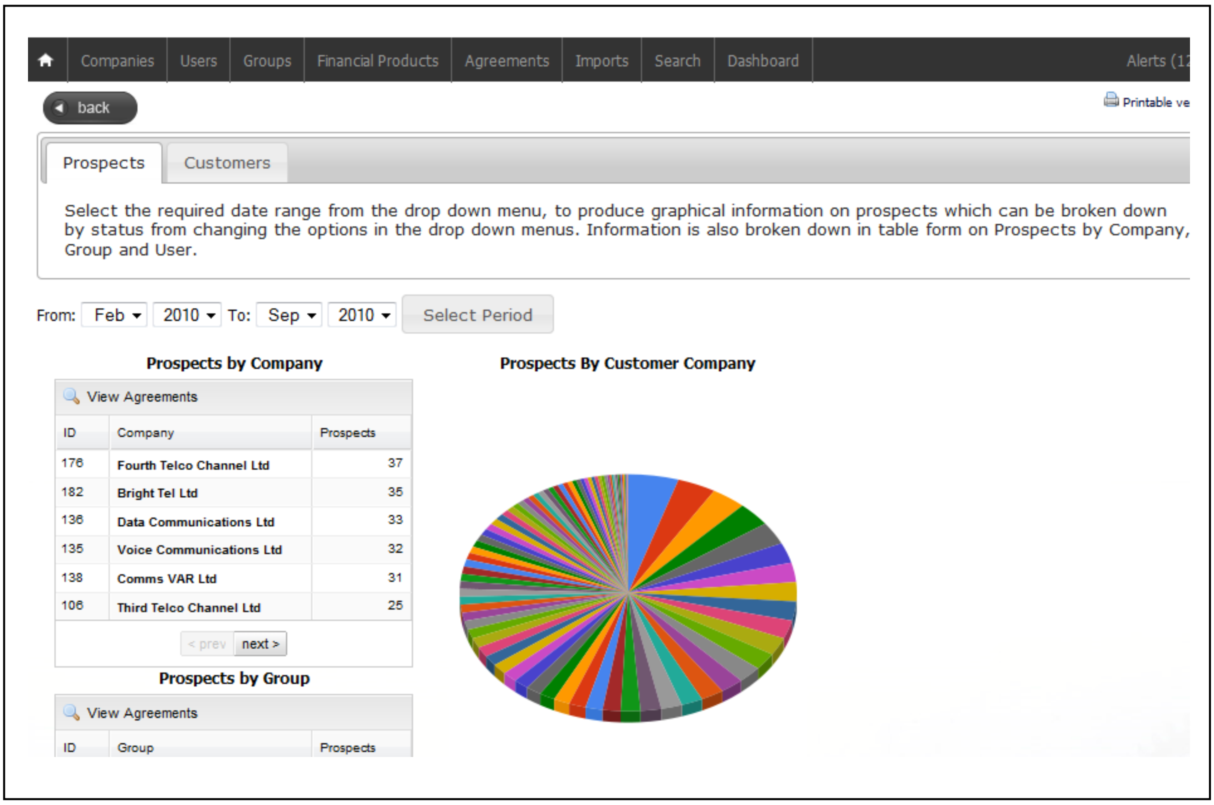
This screen provides users with a snap shot of their organisational live agreement and Prospect information determined by role type, for example Managers set as Main will be able to view all of their team's information in an instant.

11.1. Prospects:

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

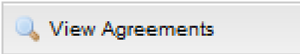
1. Go to Dashboard on the main top menu.

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



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

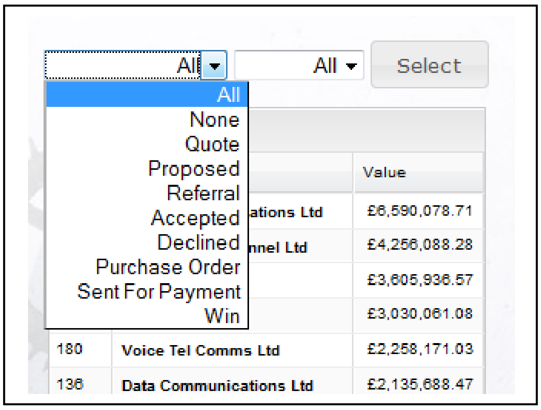
4. The data and graph presented on the page will then change as a result of the date ranges selected.

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

. Alternatively, double click on the required line.

11.1.1 Viewing Top Prospect Information in Graphical Format:

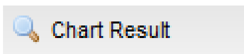
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



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

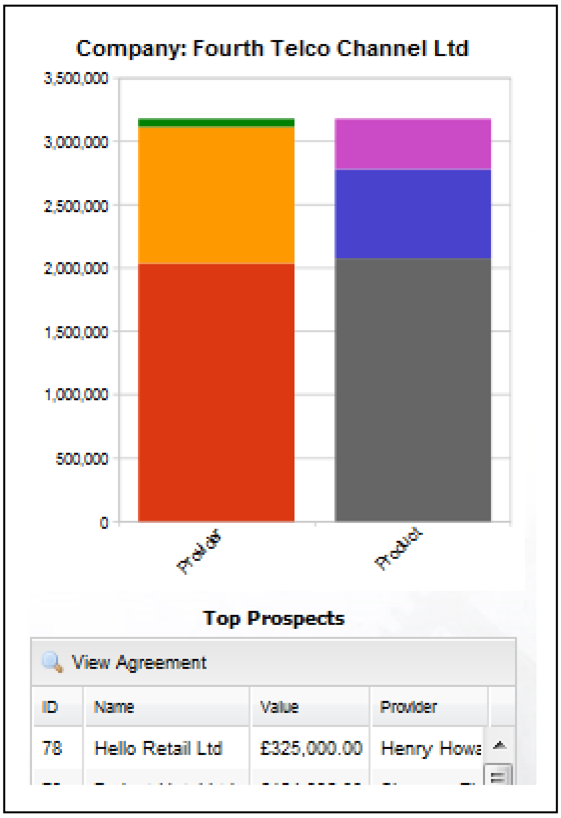
3. You will then be presented with the required information within the table below.

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;

Note: You can view any of the individual pie chart or bar chart segment by double clicking on the required segment/area.



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

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

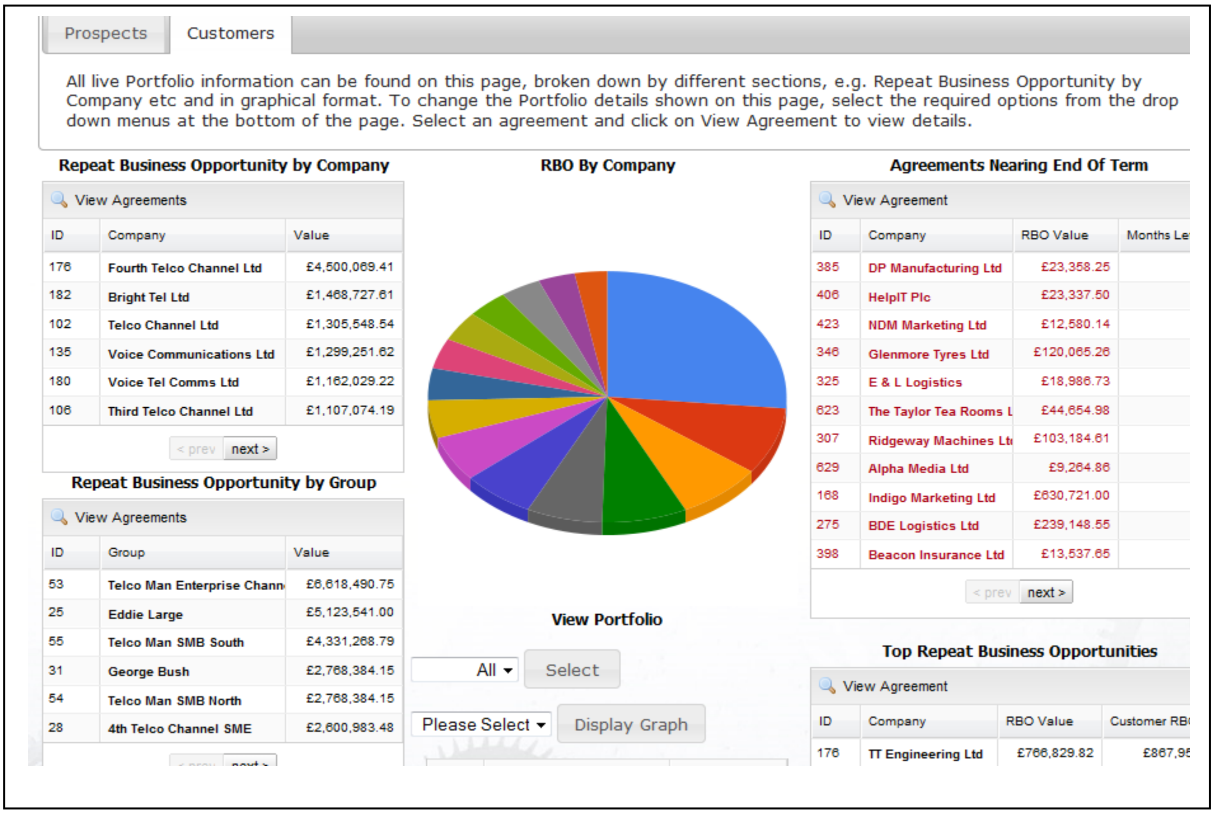
11.2. Customers:

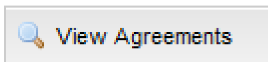
1. Select the 

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

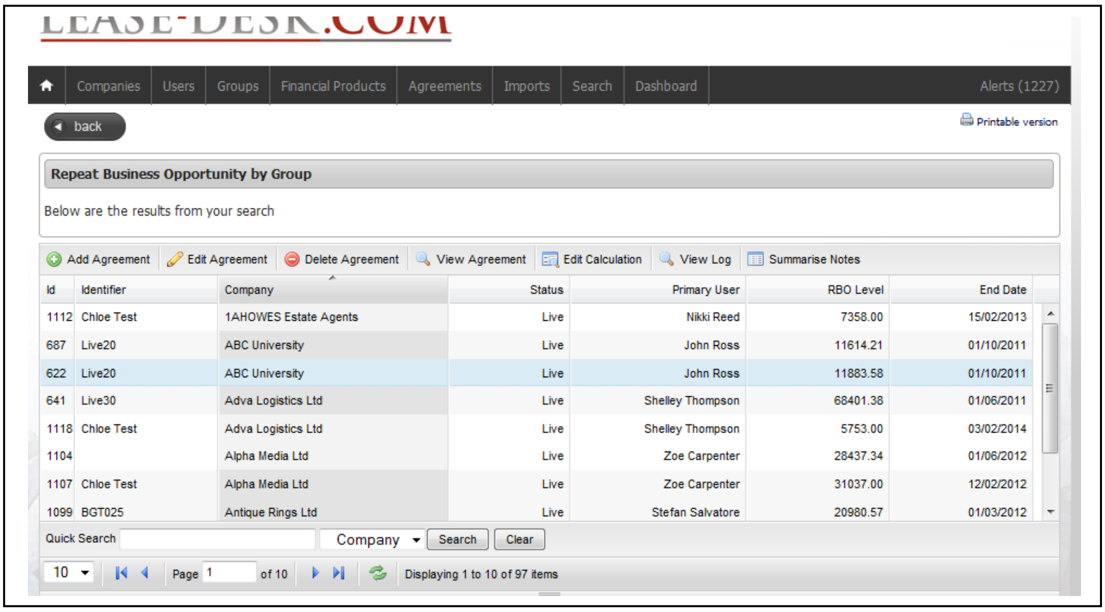
2. You will then be presented with the main Dashboard screen for Customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- **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 

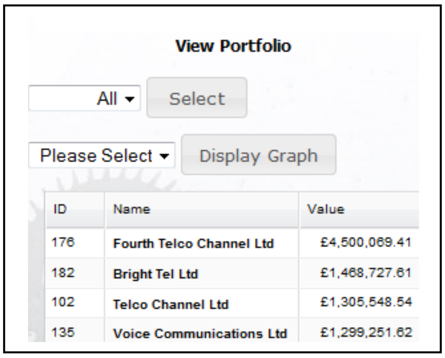
4. Dependent upon which option you select, you will then be presented with the individual Agreement Information in table format, as indicated below;



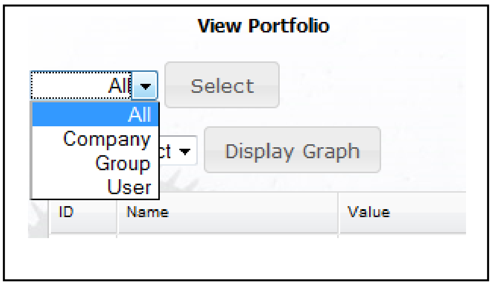
5. You then have the option to add a completely new Agreement, Edit the Agreement, delete the Agreement, View Agreement, and View Log (Audit Log). Refer back to Chapter 8 for how to do this.

11.2.1 Viewing/Amending Portfolio Information:

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



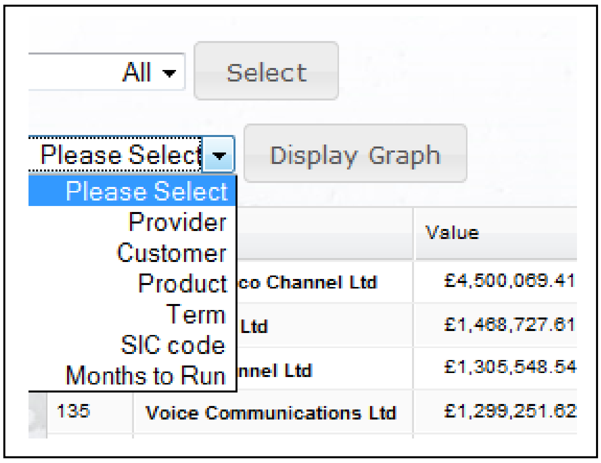
2. In the first drop down menu, select the required grouping option (Company, Group or User).



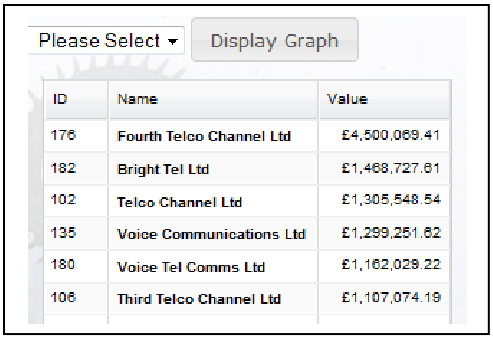
3. Click 

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

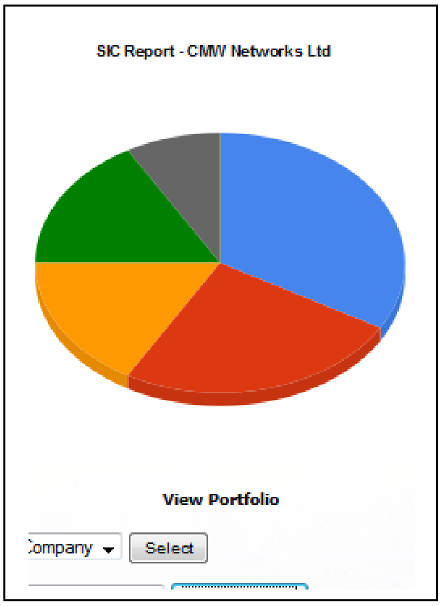
5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click 



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



12. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to Vendor and Administration users. As an Administrator, you will be able to view all of the Alerts generated by the system, until a user 'Completes' an Alert that they have received. This will then be removed from the system and the details will be shown in the Audit Log.

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

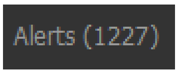
The Alert Triggers are as follows;

- 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 a reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through the term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.
- One month before an agreement reaches its end of term; in order to notify the customer that they need to provide written confirmation to the Financial Provider if cancelation is required.

- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

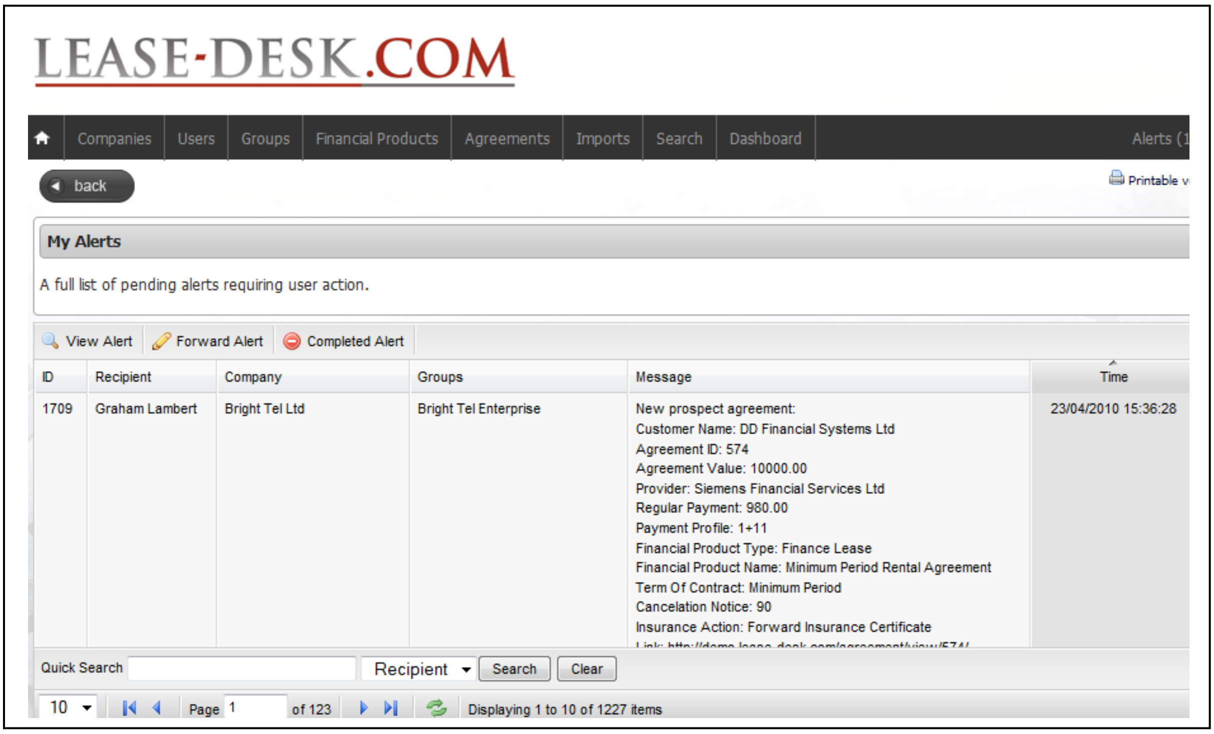
Note: ***Emails generated go out on the hour and every, 15, 30, 45 minutes past the hour.***

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

1. To view your individual user alerts, select 

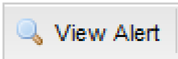
from the top menu.

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



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

12.1 Viewing Alerts:

1. Highlight the required alert from the table and then click on 

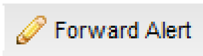
12.2 Completing Alerts:

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

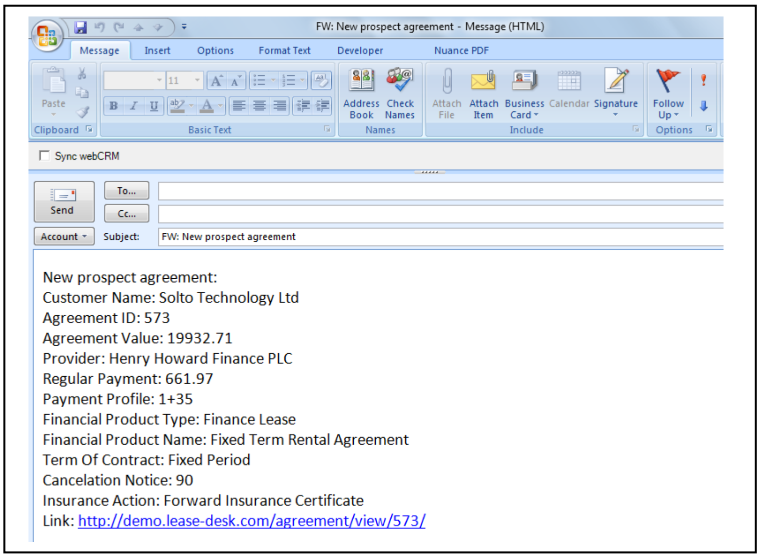
from the main alert list view or 

from the 'View Alert' Screen.

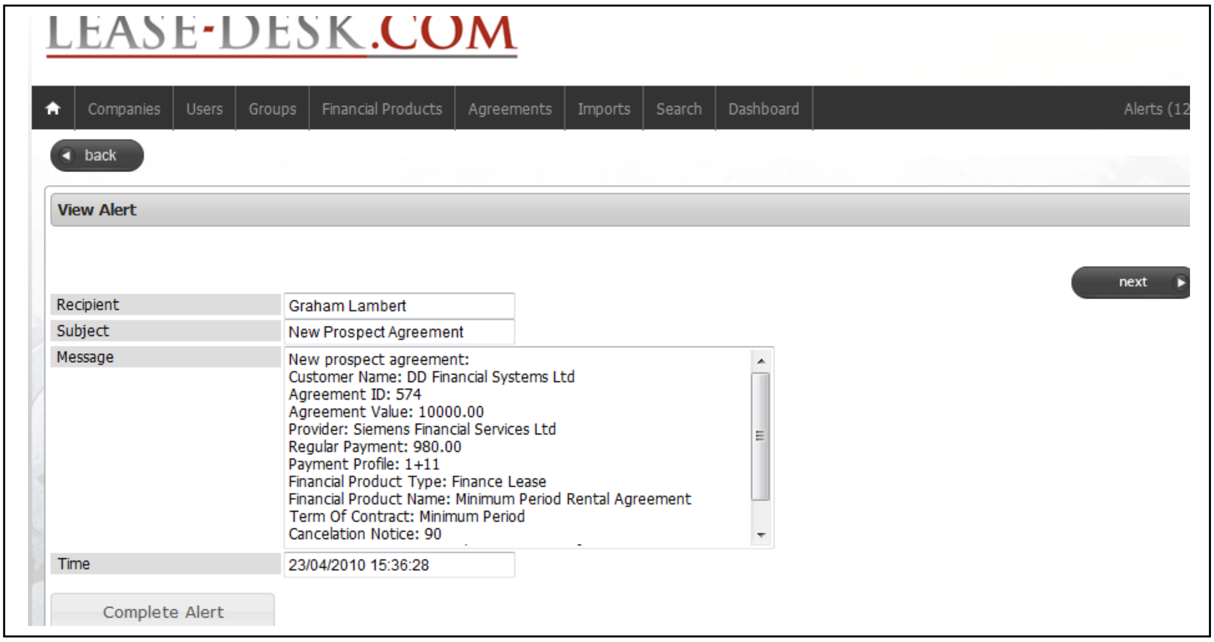
12.3 Forwarding Alerts:

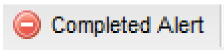
1. From the 'My Alerts' main view, highlight the required alert and click 

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



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



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

13. General Functionality:

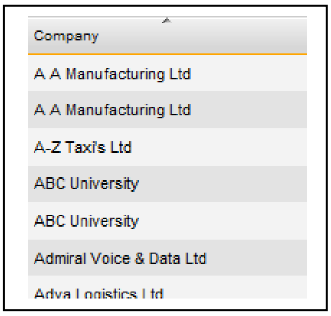
13.1. Sort:

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

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

Before Sort

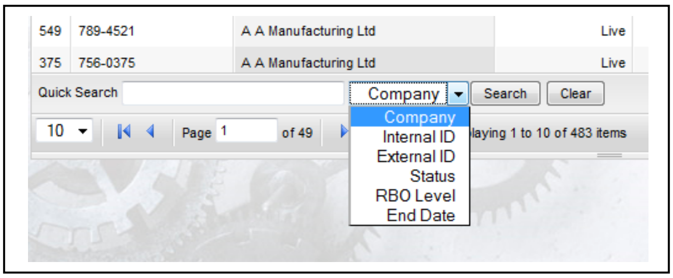
After Sort



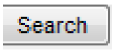
13.2 Quick Search:

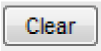
There is a 'Quick Search' functionality available within the majority of the main tables (Companies, Users, Groups etc), allowing easy access to the required information. You will find the 'Quick Search' function at the bottom of the tables noted above.

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



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

3. Click  to search for the information

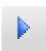
4. Click  to start from the beginning.

13.3 Refresh:

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

13.4 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

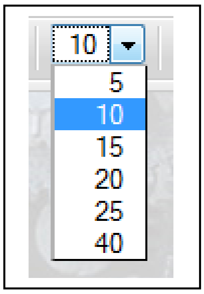
 Forward to end of records

 Go back to previous page of records

 Go to the start of the records

13.5 Changing the amount of records per view:

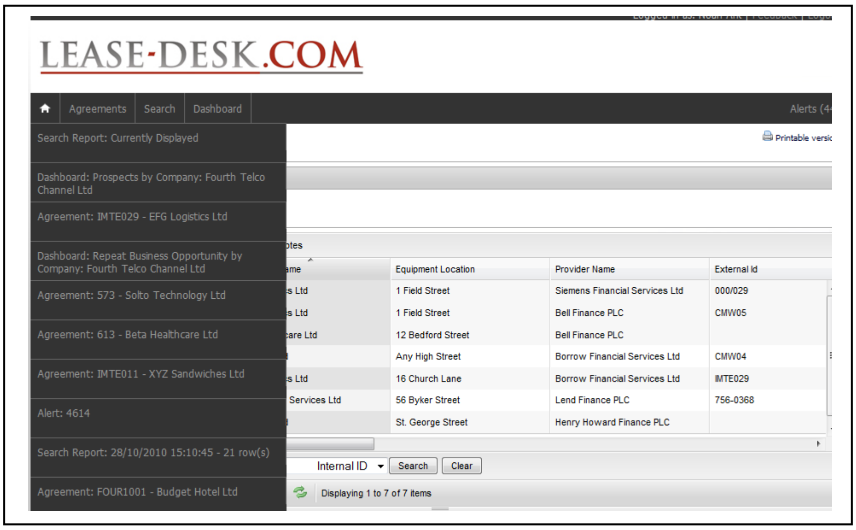
2. At the bottom of each table, select the drop down list to change the number or records viewed on a page at one time, as per below.



13.6 Last 10 Records:

1. Lease-Desk keeps a track on the last ten records that you have viewed, whether it's an agreement or a search report. The data is stored so that you can easily go back to it at any time.

2. To access your 'Last ten records viewed' list, hover with your mouse over the homepage icon as per below;

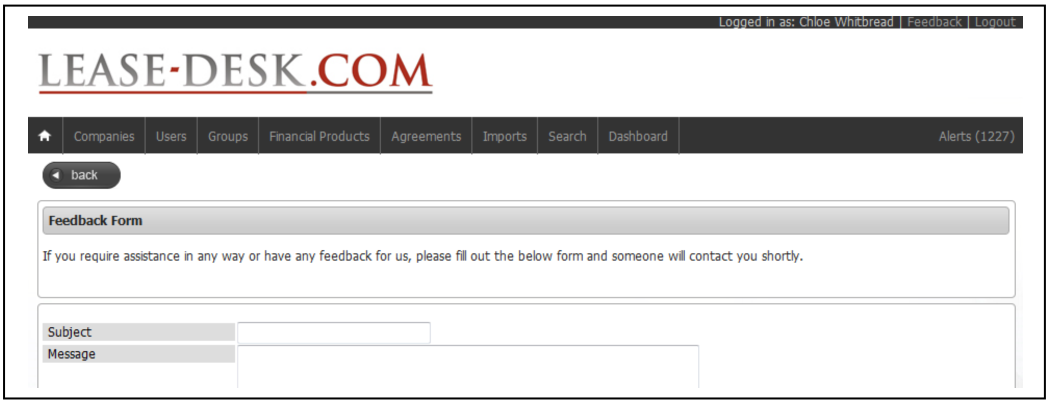


3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

14. Feedback:

1. Users have the ability to contact the Lease-Desk administration team using the Feedback functionality. To action this, they will select Feedback from the main menu.

2. The user will then be presented with the 'Feedback Form' screen as indicated below;



6. The user will need to add a Subject Title and complete the message detail box.

7. Once completed, click Send Feedback

8. An email will then get sent to the Administration Team, as indicated below

9. The email generated will appear in the team's inbox as below;

15. Contact Details:

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

Proctor Consulting UK Ltd,
Manor Farm,
Harwell,
Doncaster,
South Yorkshire,
DN10 5BU

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