

LEASE-DESK.COM

# Normal Access User Manual

## Version 2.2



DRIVING  
SALES AND  
PROFITABILITY

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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.

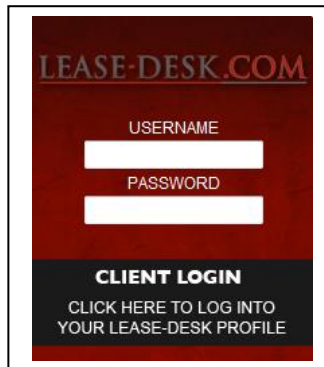
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

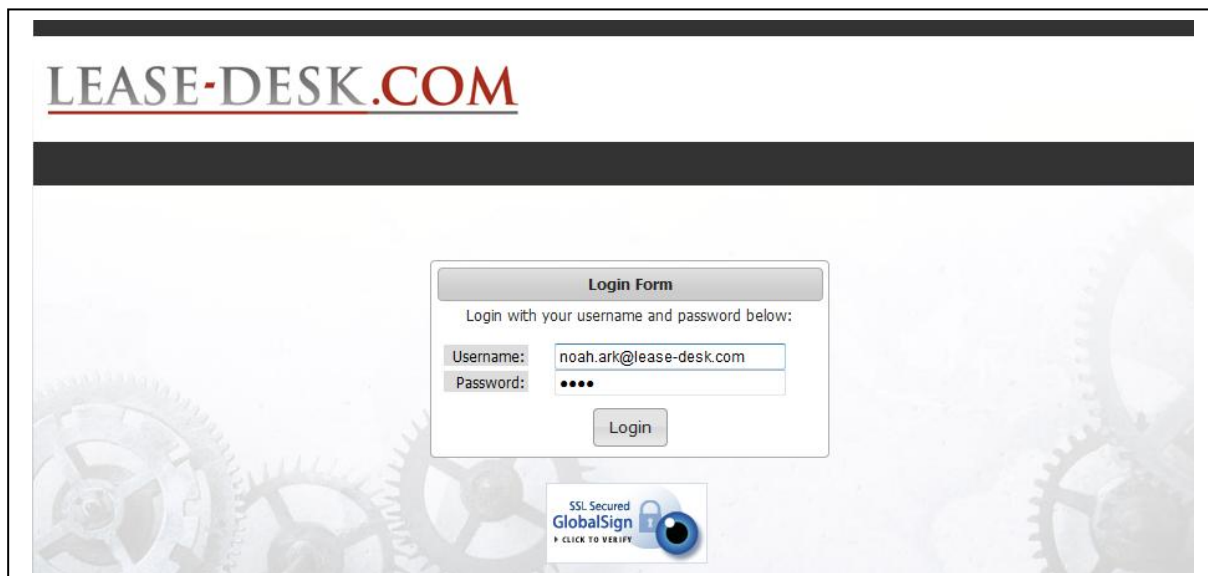
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the 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](http://www.Lease-Desk.com) and click on the Client Login box as per below.

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

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

A screenshot of the Lease-Desk.com User Login page. The page has a white background with a dark grey header bar at the top containing the text 'LEASE-DESK.COM'. Below the header is a large, light grey gear graphic. In the center is a 'Login Form' box with a grey header. Inside the form, it says 'Login with your username and password below:'. There are two input fields: 'Username:' with the text 'noah.ark@lease-desk.com' and 'Password:' with four dots. Below the fields is a 'Login' button. At the bottom of the form is a 'SSL Secured GlobalSign' logo with the text 'CLICK TO VERIFY'.

3. Enter your details and click on

A grey button with the text 'Login' in a sans-serif font.

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;

**Company Details**

Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc.

**Company Information**

Name 1st Class Mailing Limited

Company Type Vendor

Vendor Status Live Vendor

SIC Code (6411) NATIONAL POST ACTIVIT

Registration Number 06912092

Turnover 0.00

Employees 0

Credit Rating 38

Credit Limit 500.00

Analysis Date 03/09/2010

Trading Entity Limited Company

Years In Business 1

**Addresses**

ID	Type	Name	Address	Telephone
1396	Commercial	Registered A	20 Heathfield, West Allotm	Unknown

**Files**

View File

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

**Groups**

ID	Name
115	1st Class Mailing

**Providers**

ID	Company ID	Name
165	1344	ING Lease (UK) Limited
166	1345	Akile Finance Limited
167	1346	Black Arrow Finance Limited

**Users**

ID	User Name	Full Name	Job Title	Type
651	paul.reevell@lease-desk.com	Paul Reevell	Director	Normal

**Products**

Print Products

ID	Part Number	Name	Manufacturer
3342	001	FRAMA MATRIX F4 DIGITAL FRANKING MACHINE	Na

Quick Search  Contains  Part Number  Search Clear

10 Page 1 of 1 Displaying 1 to 1 of 1 items

**Notes**

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.

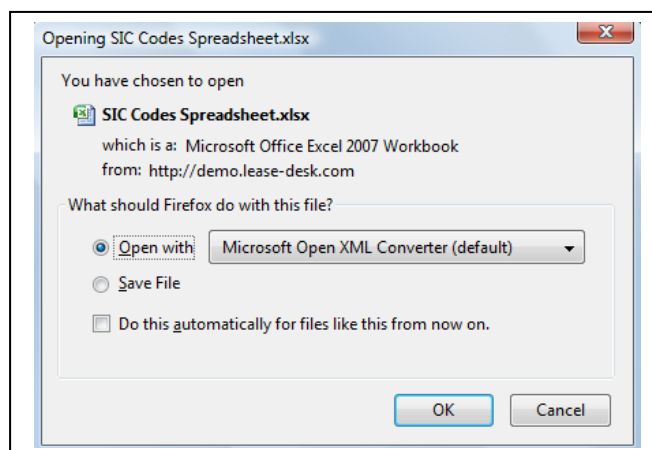
### 3.1. Viewing Files:

**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  View File

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;

**Notes**

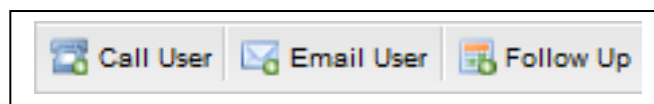
Call User Email User Follow Up View Agreement View Note Summarise

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/view/	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/	12/04/2011 16:41:34
312	Call	831	Noah Ark	Martine Williams	Called: 01753 434000 (Tel) testing Link: https://demo.lease	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, select the required action from the options below;



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

**Call User**

Select User:

Select Customer:

Select Agreement:

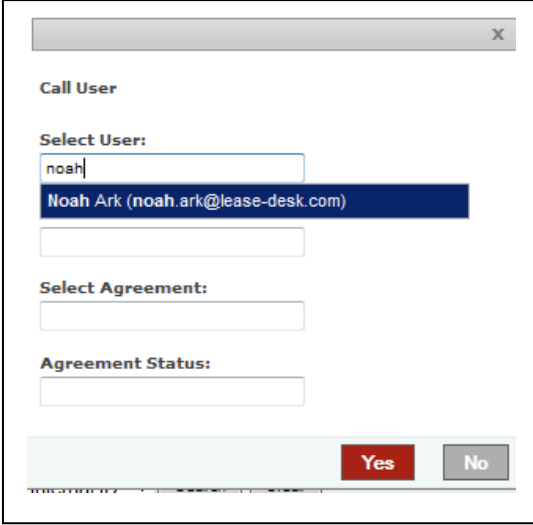
Agreement Status:

Yes No

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.





**Call User**

Select User:

noah

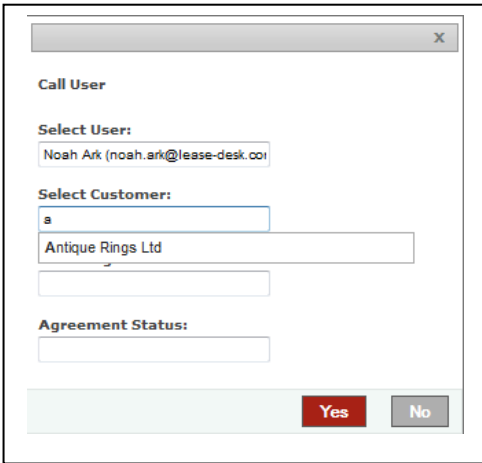
Noah Ark (noah.ark@lease-desk.com)

Select Agreement:

Agreement Status:

Yes No

5. Next, type in the customer name as indicated below;



**Call User**

Select User:

Noah Ark (noah.ark@lease-desk.com)

Select Customer:

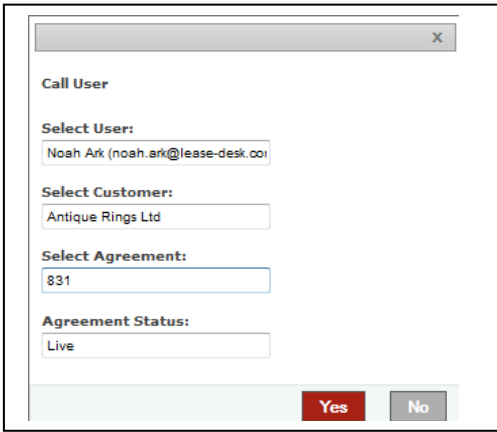
a

Antique Rings Ltd

Agreement Status:

Yes No

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;



**Call User**

Select User:

Noah Ark (noah.ark@lease-desk.com)

Select Customer:

Antique Rings Ltd

Select Agreement:

831

Agreement Status:

Live

Yes No

7. Click 'Yes' to add a note or 'No' to cancel.

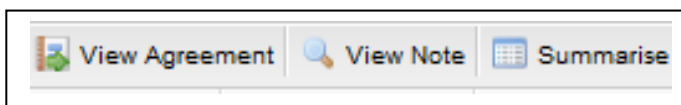
8. Selecting 'Yes' will take you to the relevant note screen, dependant on the option you have selected, i.e. 'Call User, Email or Follow Up'. For information on how to use these options, refer to sections 4.1.1 onwards.

### 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: <a href="https://demo.lease-desk.com/">https://demo.lease-desk.com/</a>	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: <a href="https://demo.lease-desk.com/agreement/view/">https://demo.lease-desk.com/agreement/view/</a>	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 I	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: <a href="https://demo.lease-desk.com/agreement/view/E">https://demo.lease-desk.com/agreement/view/E</a>	12/04/2011 16:41:34
312	Call	831	Noah Ark	Martine Williams	Called: 01753 434000 (Tel) testing Link: <a href="https://demo.lease-desk.com/">https://demo.lease-desk.com/</a>	12/04/2011 16:41:19
Quick Search <input type="text"/> Contains <input type="text"/> Internal ID <input type="text"/> Search <input type="button" value="Clear"/>						
10 <input type="button" value="Previous"/> <input type="button" value="Next"/> Page 1 of 5 <input type="button" value="Refresh"/> 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).

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Home Agreements Search Dashboard Alerts (228)

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**Agreement List**

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

View Agreement View Log Summarise Notes

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
175	000/029	BDE Logistics Ltd	End of Term	Pete Johnson	67,675.85	30/01/2011
855		Bex Ltd	Live	Bexi Test 3	9,902.65	15/10/2011
858		Bex Ltd	Live	Bexi Test 3	14,166.60	15/07/2011
854		Bex Ltd	Live	Bexi Test 3	11,666.40	15/01/2012

Quick Search Contains Company Search Clear

10 Page 1 of 3 Displaying 1 to 10 of 30 items

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

4. Click  or double click with your mouse on the agreement required.

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

(This is indicated on the following page).

### Customer Information:

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

### Contract Terms:

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

The Status 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.

The screenshot shows the 'View Agreement' page in the LEASE-DESK.COM system. The page is divided into several sections with annotations pointing to specific fields:

- Customer Information:** Points to the 'Customer' section containing:
 

Credit Limit	1,100.00
Credit Rating	45
Analysis Date	22/06/2010
- Contract Terms:** Points to the 'Upgrade Options' and 'Contract Terms' sections.
  - Upgrade Options:**

RBO Level	7,856.20
Periods Left	5
Settlement	7,570.80
Last Payment	12/07/2012
Last Notice	14/07/2012
Capital Amount	15,427.00
  - Contract Terms:**

Internal Agreement Id	835
Agreement Identifier	Test
Equipment Location	Main Address
Payment Type	Advance
- End of Term:** Points to the 'End of Term' section:
 

Secondary Rental	0.00
------------------	------
- Companies Information:** Points to the 'Companies' table:
 

ID	Name	Primary Contact	Type
222	Antique Rings Ltd	Damon Salvatore	Customer
101	Henry Howard Finance PLC	Rebecca Jones	Provider
176	Fourth Teloo Channel Ltd	Noah Ark	Vendor
- Financial Product Information:** Points to the 'Financial Product' table:
 

Name	Notice	Type
Fixed Term Rental Agreement	90	Finance Lease
- Upgrade Options:** Points to the 'RBO Level' field in the 'Upgrade Options' table, which is highlighted in red.
- Product Information:** Points to the 'Products' table:
 

ID	Vendor	Part Number	Name	Manufacturer	Price	Quantity	Value
553	Fourth Teloo Channel Ltd	23235262	2 By 2 User Card	Teloo Manufacturer Ltd	15,427.00	1	15,427.00

#### 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.

A screenshot of the 'Add Call Note' screen in the Lease-Desk system. The page has a header with the Lease-Desk logo and navigation links. A 'back' button is at the top left. The main content area is titled 'Add Call Note' and includes instructions to add details to a message box. Below this is a form with fields for Agreement ID (831), Customer Name (Antique Rings Ltd), User Name (Damon Salvatore), Company Name (Antique Rings Ltd), Telephone Number (0115 9627451 (Tel)), and a Message field. A 'Save Details' button is at the bottom right. A link to the agreement view is displayed at the bottom of the message field.

Logged in as: Noah Ark | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (194)

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**Add Call Note**

Add a note by adding details to the message box and clicking on Save.

Agreement ID	831
Customer Name	Antique Rings Ltd
User Name	Damon Salvatore
Company Name	Antique Rings Ltd
Telephone Number	0115 9627451 (Tel) ▼
Message	

Link: <https://demo.lease-desk.com/agreement/view/831/>

Save Details

4. Complete the details and click
5. The detail will then be saved as a standard note, visible within the agreement.

**LEASE-DESK.COM**

Agreements Search Dashboard Alerts

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**Add Email Note**

Add a note by adding details to the message box and clicking on Save.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
User Name	Bob Sinclair
Company Name	Beacon Insurance Ltd
Email	bob.sinclar@lease-desk.com
Populate	Blank ▼
Message	

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;

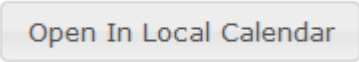
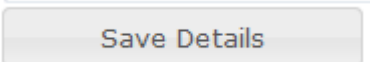
Call User Email User Follow Up View User View Company				
ID	Name	Primary Contact	Type	
222	Antique Rings Ltd	Damon Salvatore	Customer	
101	Henry Howard Finance PLC	Rebecca Jones	Provider	
176	Fourth Telco Channel Ltd	Noah Ark	Vendor	

2. Click on  Follow Up

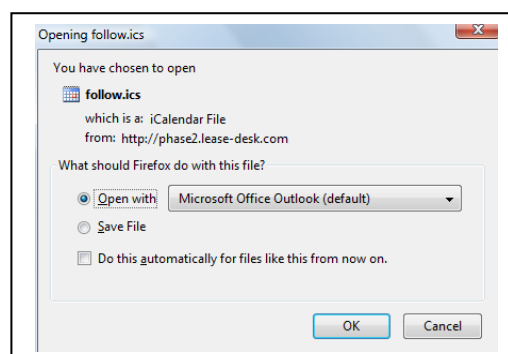
3. You will then be presented with the following screen;

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.

Companies			
<div>  Call User                      Email User                      Follow Up                      View User                      View Company                 </div>			
ID	Name	Primary Contact	Type
222	Antique Rings Ltd	Damon Salvatore	Customer
100	Siemens Financial Services Lt	Martine Williams	Provider
176	Fourth Telco Channel Ltd	Noah Ark	Vendor

2. Click on either 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.

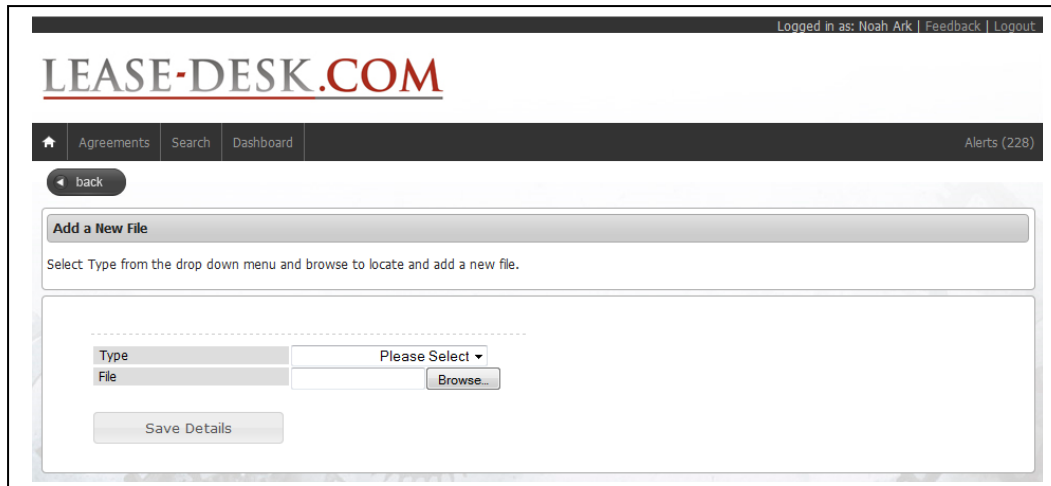


#### 4.1.4 Viewing a File:

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

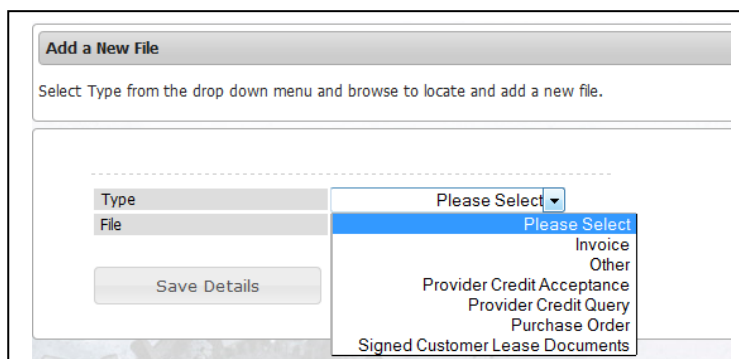
#### 4.1.5. Adding a File:

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;



The screenshot shows the 'Add a New File' screen in the Lease-Desk system. At the top, there is a navigation bar with the Lease-Desk logo and links for Agreements, Search, and Dashboard. A 'back' button is visible. The main content area has a title 'Add a New File' and a subtitle 'Select Type from the drop down menu and browse to locate and add a new file.' Below this, there is a form with a 'Type' dropdown menu set to 'Please Select', a 'File' input field, and a 'Browse...' button. A 'Save Details' button is at the bottom.

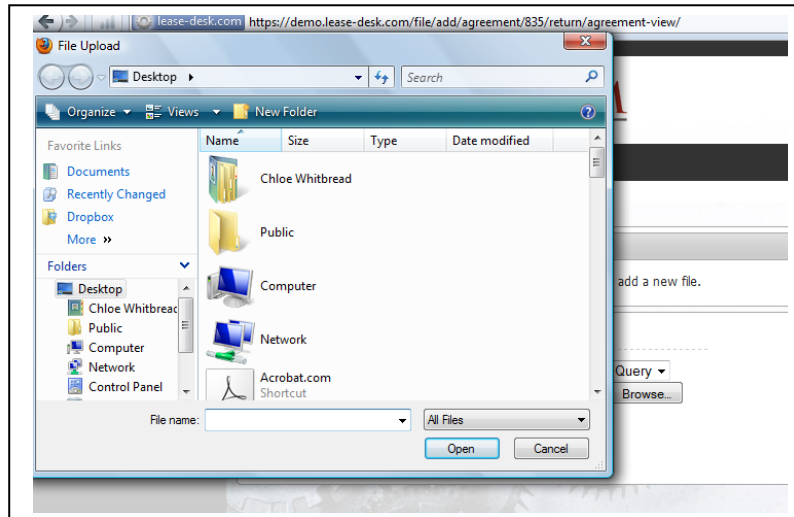
3. Select the type from the drop down menu, as per below;



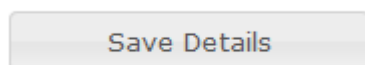
This screenshot shows the 'Add a New File' screen with the 'Type' dropdown menu open. The menu lists several options: 'Please Select', 'Invoice', 'Other', 'Provider Credit Acceptance', 'Provider Credit Query', 'Purchase Order', and 'Signed Customer Lease Documents'. The 'File' input field and the 'Browse...' button are visible below the dropdown. A 'Save Details' button is at the bottom.

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;

Files		
<a href="#">+ Add File</a> <a href="#">View File</a> <a href="#">Create Document</a>		
ID	Name	Type
73	April 2011.xls	Provider Credit Query

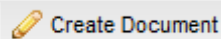
#### 4.1.6 Creating a Document:

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.

Files		
<a href="#">Add File</a> <a href="#">View File</a> <a href="#">Create Document</a>		
ID	Name	Type
60	Agreements Training.xlsx	Invoice
59	Minimum Term.pdf	Other
61	Minimum Term.pdf	Other

2. Click on



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

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)

[back](#)

### Create Document

Select the document to create from agreement data.

Documents

Please Select

File Type

Please Select

[Download now](#)
[Add document to files](#)

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

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)

[back](#)

### Create Document

Select the document to create from agreement data.

Documents

Please Select

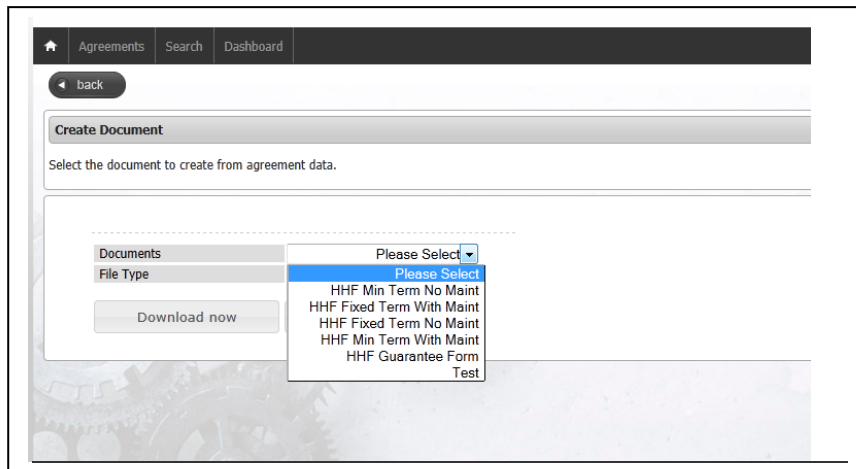
File Type

Please Select

[Download now](#)

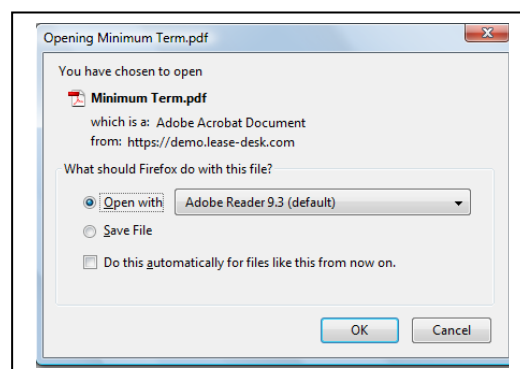
Please Select  
Please Select  
HHF Min Term No Maint  
HHF Fixed Term With Maint  
HHF Fixed Term No Maint  
HHF Min Term With Maint  
HHF Guarantee Form  
Test

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



6. Select **Download now** 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 **Add document to files** 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;

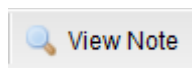
**i Added document to agreement file store**

#### 4.1.7 Viewing a Note:

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

Notes					
 Add Note		 View Note		 Summarise	
ID	Type	Name	Note	Date	
154	External	Noah Ark	Emailed Rosie agreement deta	09/06/2010 15:53:12	
153	Email	Noah Ark	Customer Name: BDE Logistics	09/06/2010 15:52:36	
152	Call	Noah Ark	Called Pete and updated him o	09/06/2010 15:51:48	

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;

Lodged in as: Steve Barnard | Feedback | Logout

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## View Note

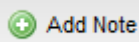
Full note details are detailed below.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
Username	Steve Barnard
Type	External
Message	Call customer tomorrow with update.

#### 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;

Logged in as: Noah Ark | Feedback | Logout

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**Add Note**

Add a note by adding details to the message box and clicking on Save.

Agreement ID: 78

Customer Name: Hello Retail Ltd

Type: External Note

Message:

agreement/view/78/

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;

Logged in as: Noah Ark | Feedback | Logout

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**Add Note**

Add a note by adding details to the message box and clicking on Save.

Agreement ID: 78

Customer Name: Hello Retail Ltd

Type: Acceptance Condition Note

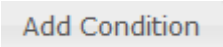
Acceptance Condition: Please Select

Acceptance Satisfied:

Add Condition:

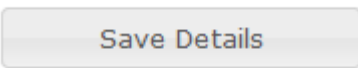
Message:

78/

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

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

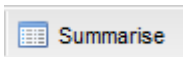
5. Type your message into the blank message box.



6. Click

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

#### 4.1.9 Summarising Notes:

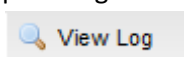
1. You can view the Summarise Notes screen either within the particular agreement selected or via the main agreement list by highlighting the particular agreement and selecting .

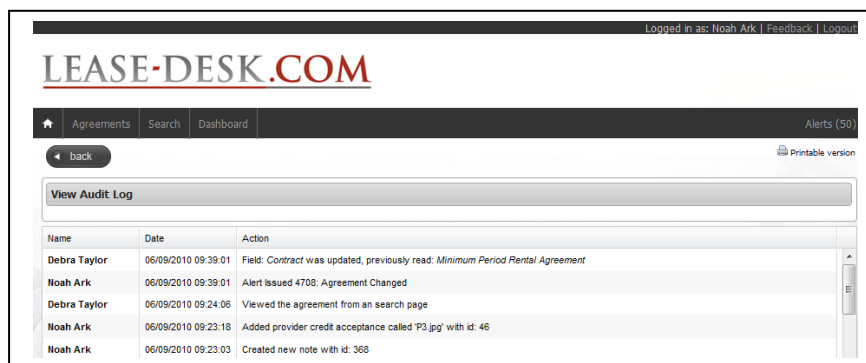
2. You will then be presented with the following View Summarised Notes screen, as per below;

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

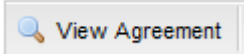
#### 4.2. Viewing an Audit Log:

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  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;

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

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

**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  on the top main menu.
2. You will be presented with the 'Search Agreements' screen, as indicated on the following page;



Search Agreements

This provides users with a facility to search for required agreements by selecting different search criteria. Enter the customer details if known to bring up the required information, or search for all customer agreements and use the filters within each table and report type, to produce the required report information.

Search Mode

Type

Standard Search

Customer

Name

Agreement Status

Prospect Status

Search

Date Range

Time Stamp Status

From

To

Customer

Customer

All

<

>

Filter

Add

Remove

Vendor

Vendor

All

<

>

Filter

Add

Remove

Primary Contact

Contact

All

<

>

Filter

Add

Remove

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

RBO Level

All

All

Customer Detail

Sic Code

All

<

>

Filter

Add

Remove

Post Code

Post

All

<

>

Filter

Add

Remove

Turnover

Credit Limit

Credit Rating

Employees

All

All

All

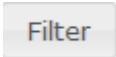
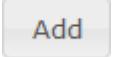
Output Type

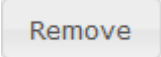
Report

Default

Reset Form

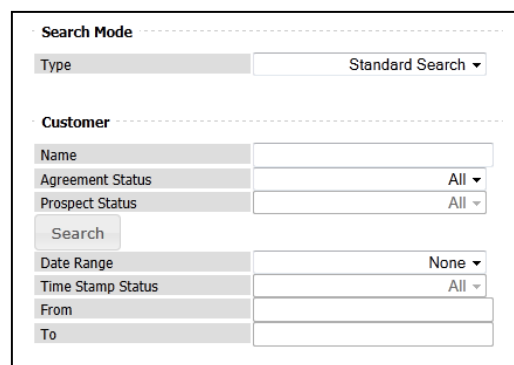
1. The Search Agreements screen, allows you to search for all agreement information that you have access to (determined by role type), by selecting the different filters required.

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

3. To remove any data selected, click .

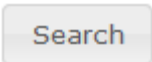
### 5.1. Searching for Specific Customer Agreement Information:

1. From the main 'Search Agreements' screen as indicated previously, enter the full or first few letters of the company name you are looking for, as per below, keeping the standard search dropdown option.



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

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

3. Click 

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

**Customer**

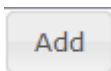
Customer

Antique Rings Ltd

All

< > Filter Add Remove

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;

**Customer**

Customer

Antique Rings Ltd

All

< > Filter Add Remove

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

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

Turnover	All
Credit Limit	All
Credit Rating	All
Employees	All

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

**Output Type**

Report

View Report

Reset Form

Default

- Default
- Management Report
- Sales Report
- Sales Report (Detailed)
- Marketing Report (Full Details)
- Marketing Report (Email)
- Marketing Report (Postal)
- Marketing Report (Contact Details)
- Prospect Report
- End Of Lease Report
- Arrears Report
- Custom

**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:

Output Type

Report

Custom

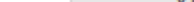
View Report

Export to CSV

Reset Form

Custom Report

4 items selected	Remove all		Add all
↕ External Id	—	Acceptance Expiry Date	+
↕ Customer Name	—	Acceptance Notice	+
↕ Vendor Name	—	Agreement End Date	+
↕ Capital Amount	—	Arrears Total	+
		Cancellation Notice	+
		Cust Home Address One	+
		Cust Home Address Three	+
		Cust Home Address Two	+

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

Logged in as: Noah Ark | Feedback | Logout

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Search Agreements

Below are the results from your search

View Agreement
 View Log
 Summarise Notes

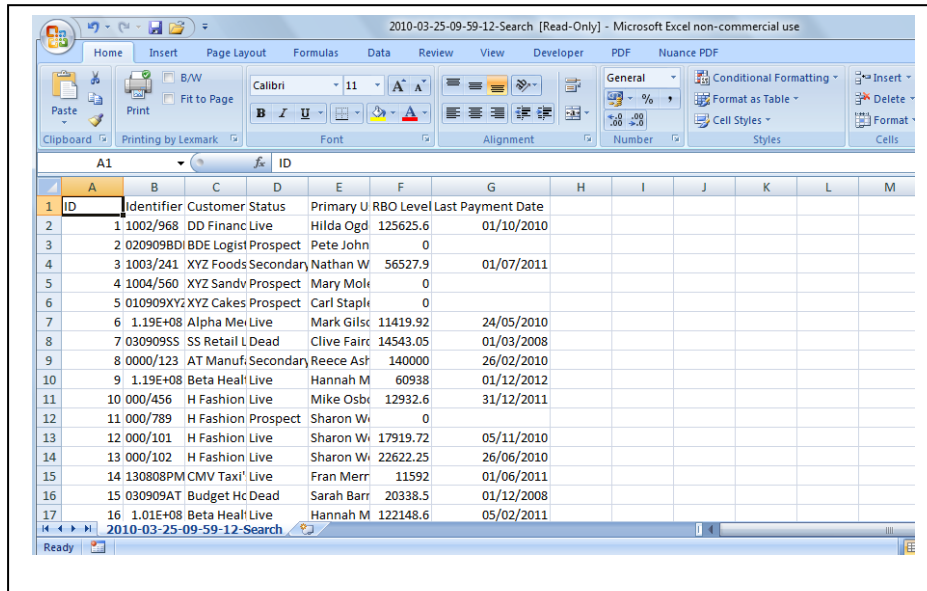
Id	Identifier	Company	Status	Primary User	RBO Level	End Date
831		Antique Rings Ltd	Live	Damon Salvatore	7,969.81	01/04/2013
835	Test	Antique Rings Ltd	Live	Damon Salvatore	7,856.20	12/07/2012

Quick Search


Contains ▾
Company ▾
Search
Clear

Export to CSV

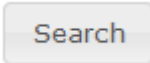
or to view in CSV format as per below;



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

<b>Customer</b>	
Name	<input type="text"/>
Agreement Status	<input type="text"/> All ▼
Prospect Status	<input type="text"/> All ▼
<input type="button" value="Search"/>	
Date Range	Prospect Status Time Stamp ▼
Time Stamp Status	<input type="text"/> All ▼
From	<input type="text"/> All
To	<input type="text"/>
<div> <div>Customer</div> <div>Customer</div> <div></div> </div>	

None  
Quote  
Proposed  
Referral  
Accepted  
Declined  
Purchase Order  
Sent For Payment  
Win

- 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;

Date Range	Prospect Status Time Stamp ▼
Time Stamp Status	<input type="text"/> All ▼
From	<input type="text"/> 30/09/2011
To	<input type="text"/> 01/10/2011

- 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.
- 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;

**Custom Report**

4 items selected	Remove all		Add all
↕ External Id	—	Time Accepted	+
↕ Customer Name	—	Time Declined	+
↕ Vendor Name	—	Time Of Purchase Order	+
↕ Capital Amount	—	Time Proposed	+
		Time Quoted	+
		Time Referred	+
		Time Sent For Payment	+
		Time Set Live	+

## 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;

**Search Mode**

Type

Standard Search

Standard Search

Secondary Income Report

Forecast Secondary Report

### 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.

**Customer**

Name

Agreement Status

Secondary Period

Prospect Status

All

Search

Date Range

Agreement Active After

Time Stamp Status

All

From

01/09/2011

To

30/09/2011



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

Export to CSV

as indicated below;

**Output Type**

Report

View Report

Reset Form

Default

Export to CSV

### 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'.

**Customer**

Name

Agreement Status

Prospect Status

Search

Date Range

Time Stamp Status

From

To

Secondary Period

All

Agreement Active After

All

01/09/2011

30/09/2011

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

Export to CSV

as indicated below;

**Output Type**

Report

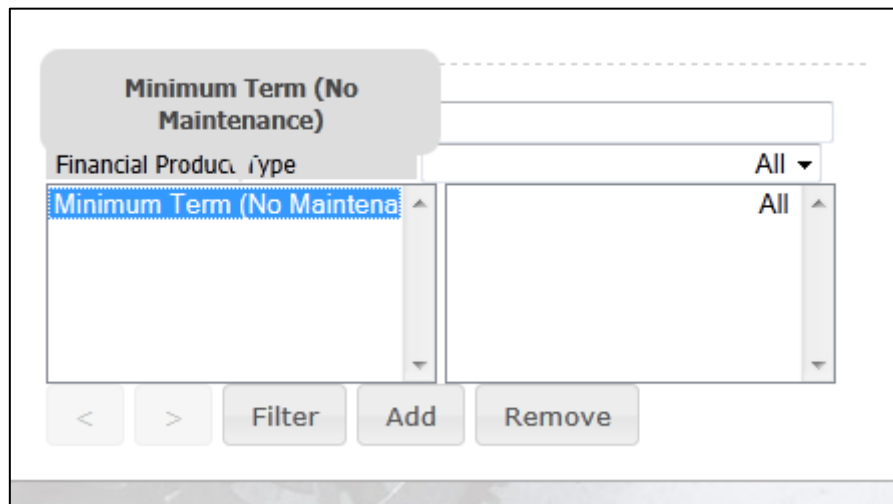
View Report

Reset Form

Default

Export to CSV

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:

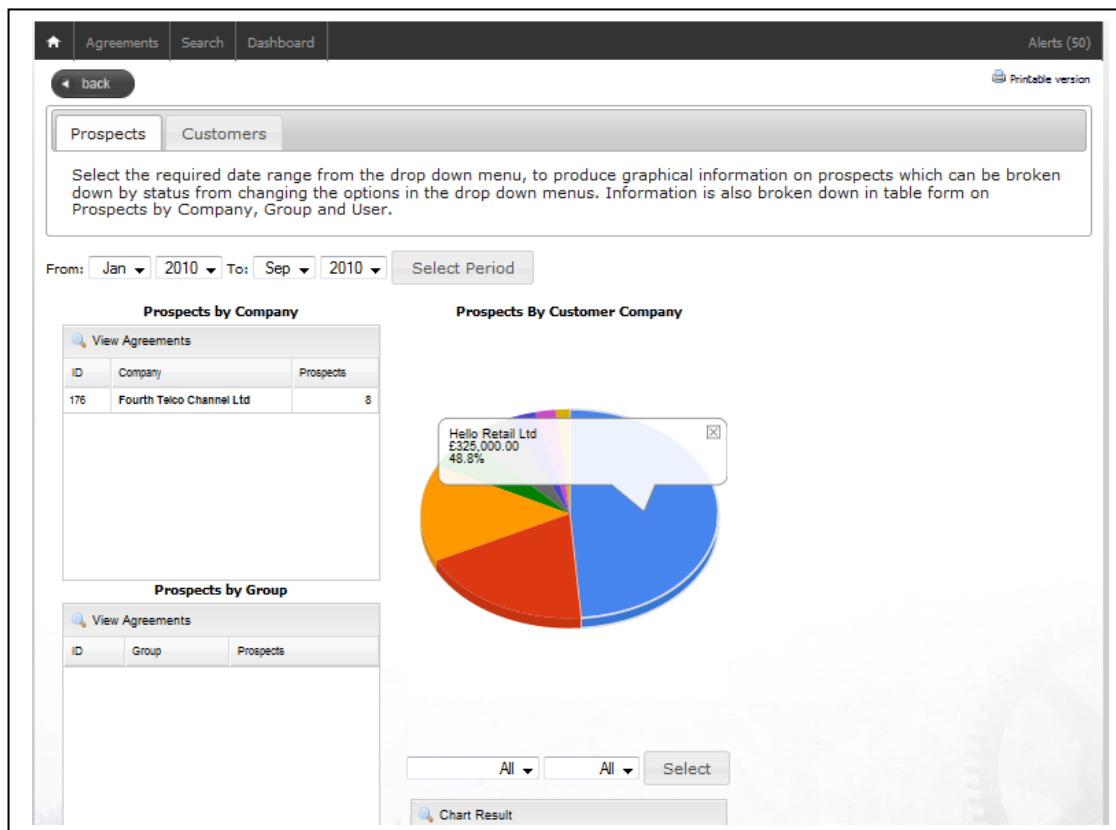
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

### 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 **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 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

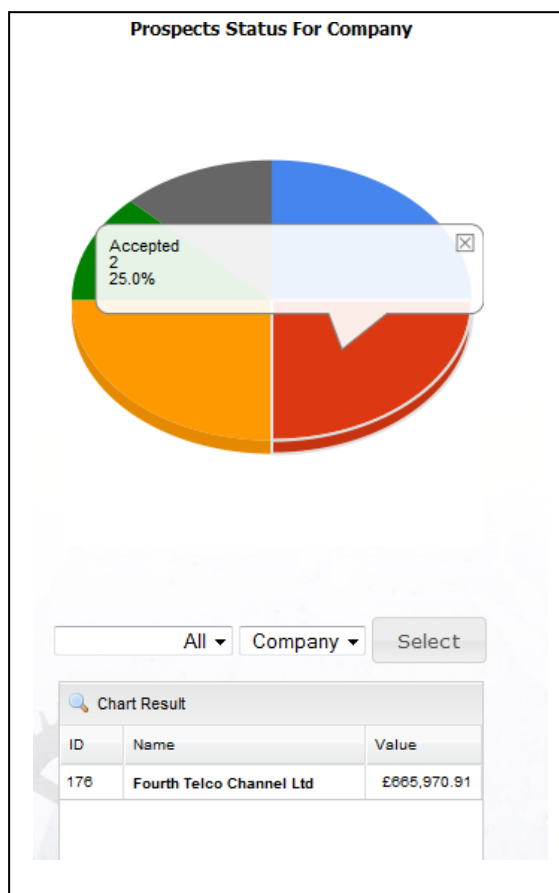
Select Period

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

From: Jan 2010 To: Sep 2010 Select Period

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

All Company Select



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

**Prospects by Company**

View Agreements

ID	Company	Prospects
176	Fourth Telco Channel Ltd	37
182	Bright Tel Ltd	35
136	Data Communications Ltd	33
135	Voice Communications Ltd	32
138	Comms VAR Ltd	31
106	Third Telco Channel Ltd	25

< prev next >

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.

Company

	Value
nnel Ltd	£665,970.91

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

Chart Result

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

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

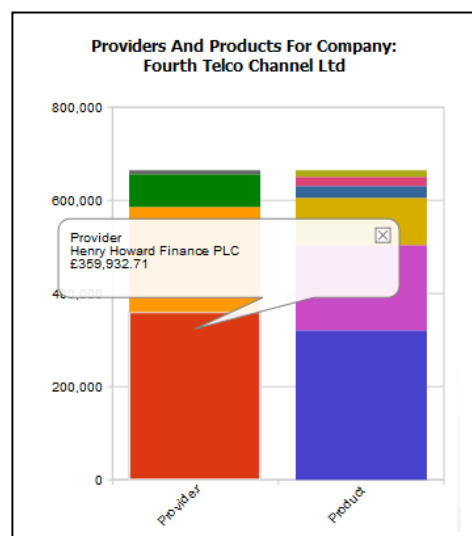
4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click



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.



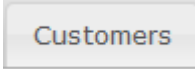
8. To View the Agreement information, highlight the line in the table below the graph and click



Top Prospects			
View Agreement			
ID	Name	Value	Provider
78	Hello Retail Ltd	£325,000.00	Henry Howard Finance PLC
79	Budget Hotel Ltd	£124,995.00	Siemens Financial Services

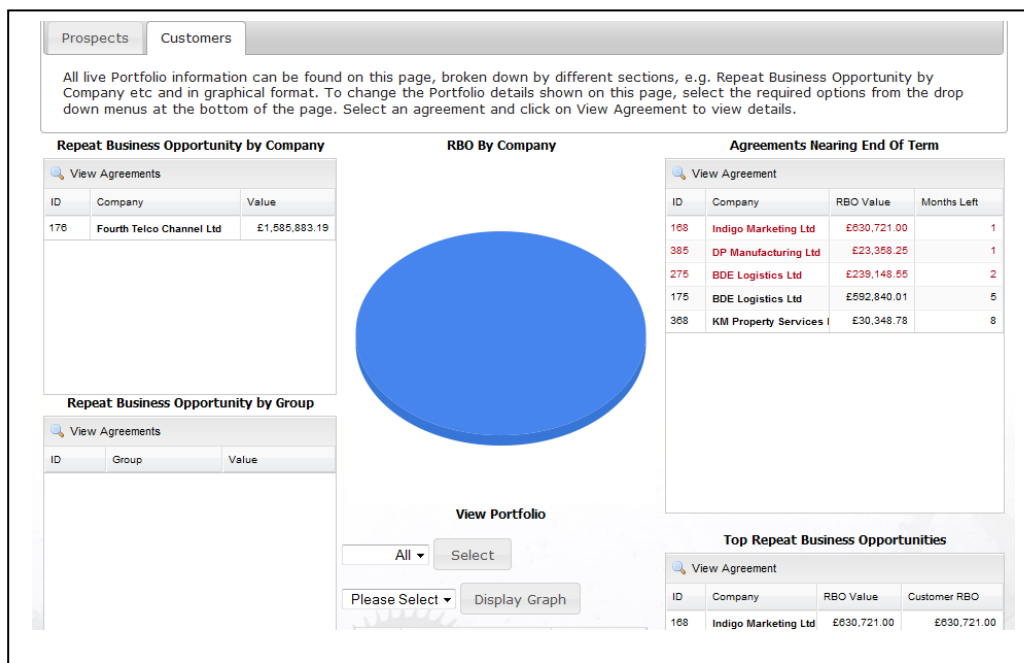
9. You will then be taken to the 'View Agreement' screen for the selected Agreement.

## 6.2. Customers:

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

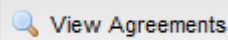
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- 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;

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Repeat Business Opportunity by Company: Fourth Telco Channel Ltd

Below are the results from your search

View Agreement View Log Summarise Notes

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

Quick Search Contains Company Search Clear

10 Page 1 of 2 Displaying 1 to 10 of 20 items

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;

**View Portfolio**

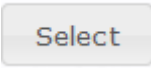
All Select

Please Select Display Graph

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

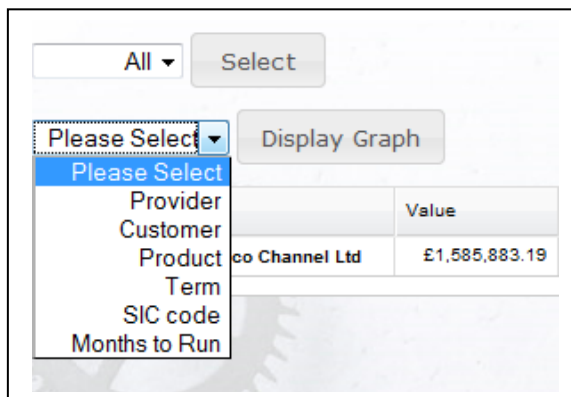


2. In the first drop down menu, select the required grouping option (All, Company, Group, User).

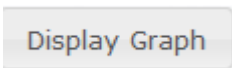
3. Click 

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;

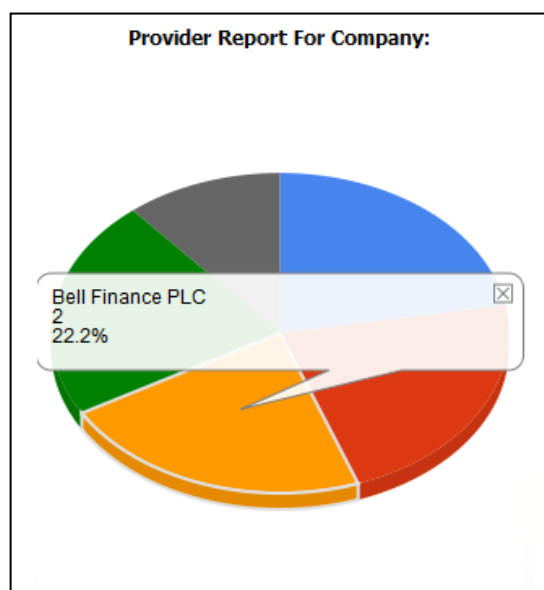


Provider	Value
co Channel Ltd	£1,585,883.19

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:

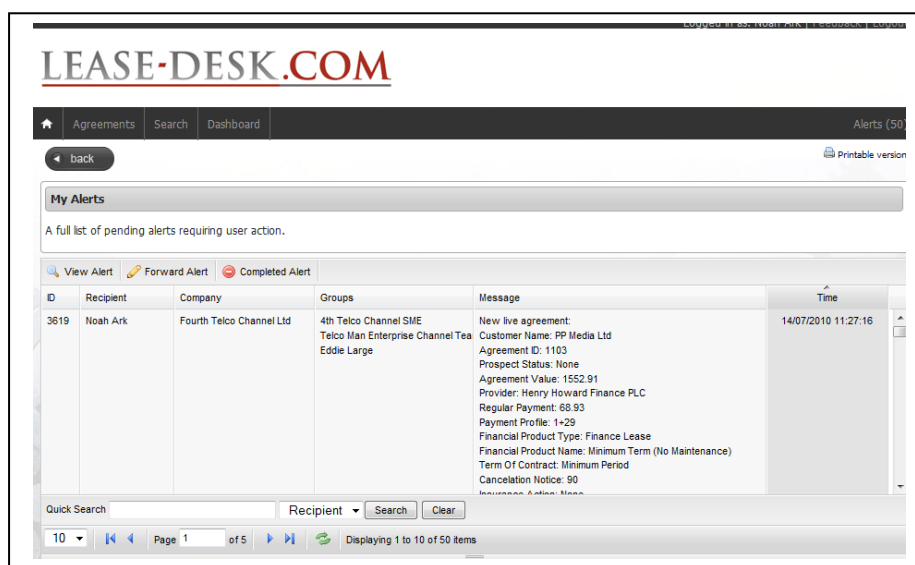
**Note:** *Emails generated go out on the hour and every, 15, 30, 45 minutes past the hour.*

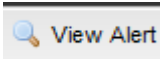
- ***Alerts should appear automatically in the Alerts list.***
- ***Alerts that are not completed will continue to generate alerts every 3 days during the following week unless the Alert has been 'Completed' on the system.***

- *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)*

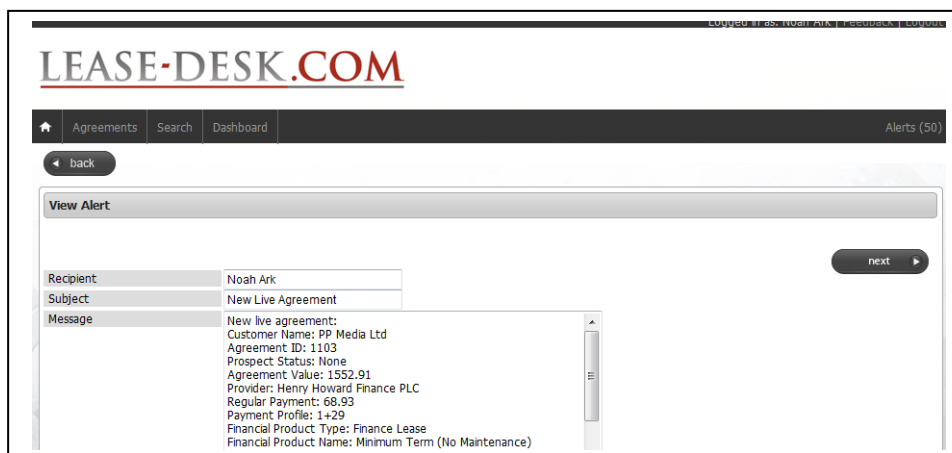
## 7.1 Viewing Alerts:

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;

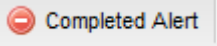
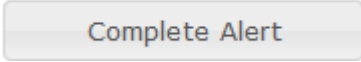


3. To view an alert, highlight the required alert and click .

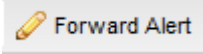
4. You will then be presented with the following screen;

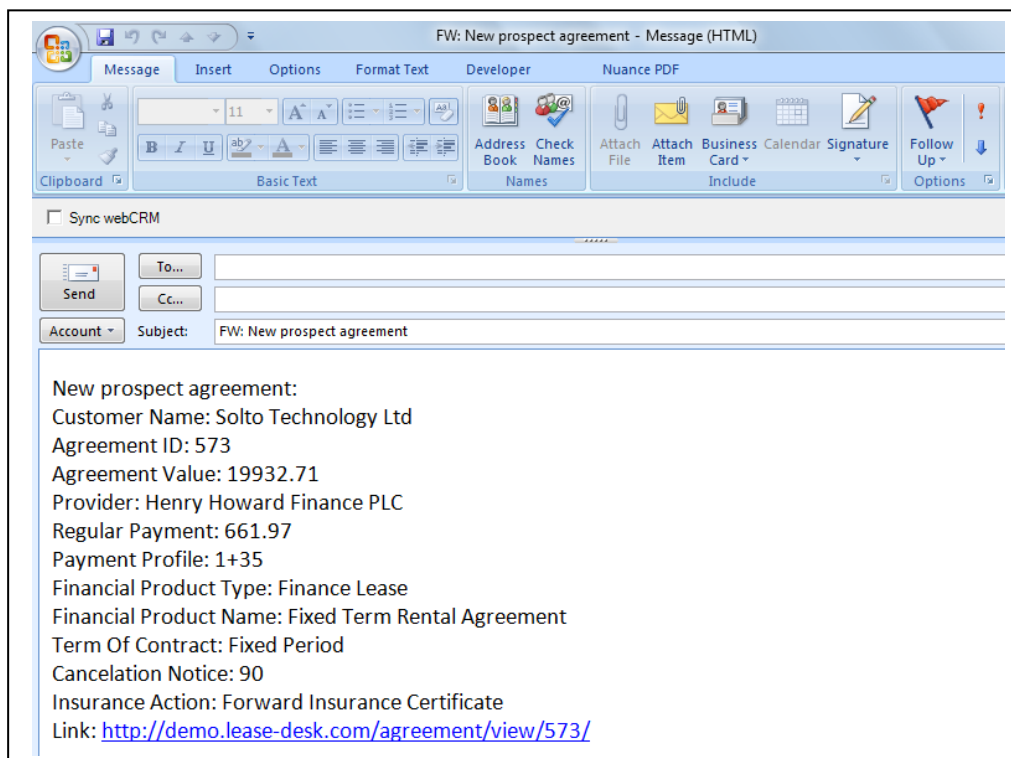


## 7.2 Completing Alerts:

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;

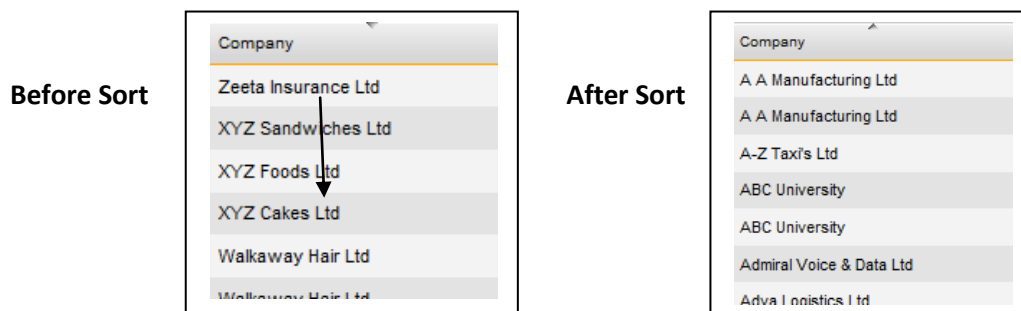


## 8. General Functionality:

### 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.

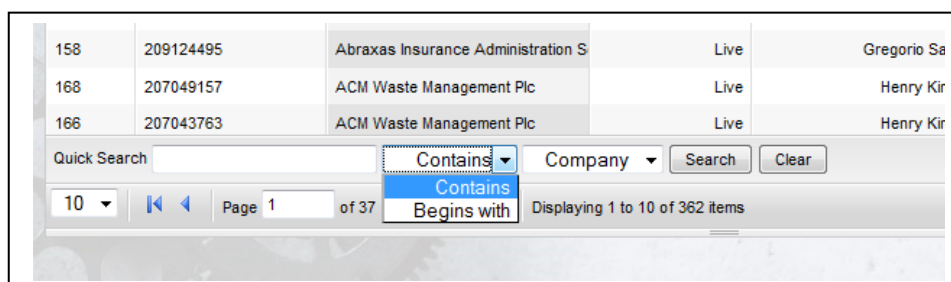
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.



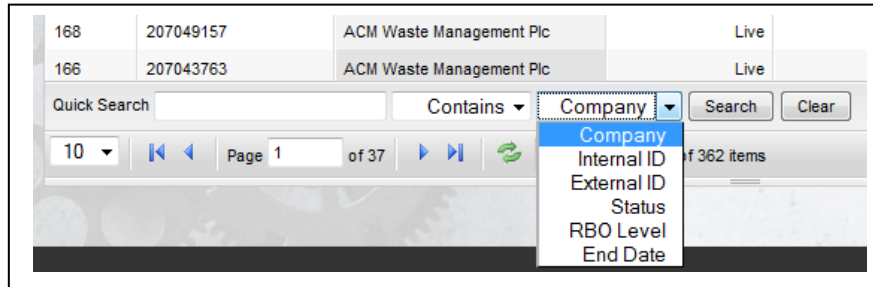
### 8.2 Quick Search:

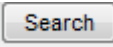
There is a 'Quick Search' functionality available within the majority of the main tables (Companies, Users, Groups etc), allowing easy access to the required information. You will find the 'Quick Search' function at the bottom of the tables noted above.

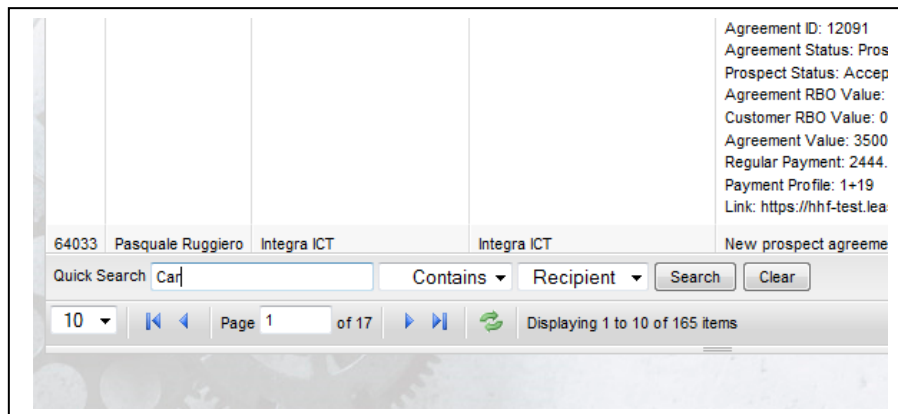
1. First of all select your search method, either 'Contains' or 'Begins with' from the drop down menu as indicated below;



2. Next, change the Search option, click on the 2<sup>nd</sup> 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



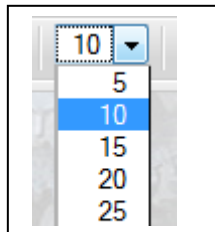
## 8.4 Scrolling through records:

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:

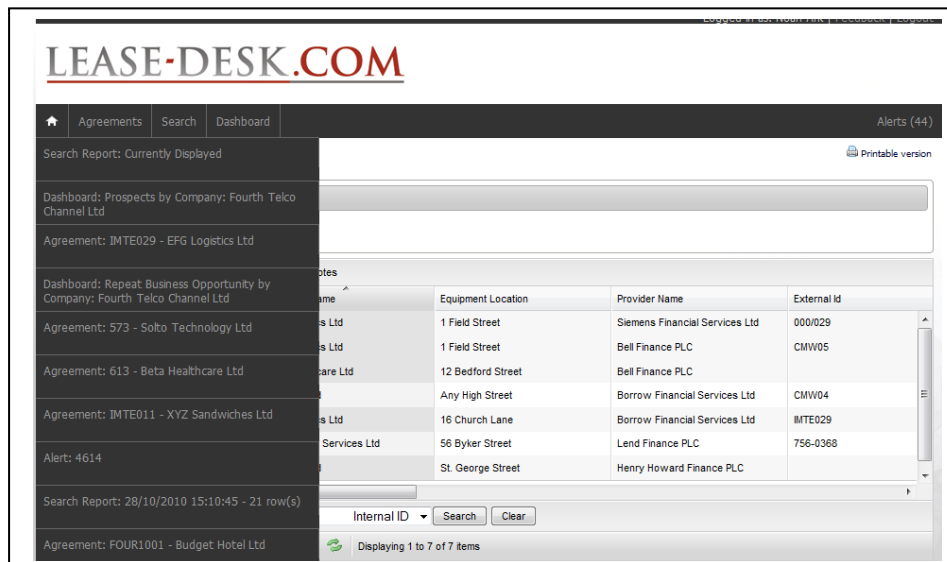
1. At the bottom of each table, select the drop down list to change the number of records viewed on a page at a time, as per below.



## 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;

The screenshot shows the LEASE-DESK.COM Feedback Form. The form is titled 'Feedback Form' and includes a 'back' button. The form contains a text area for 'Subject' and a text area for 'Message'. The form is located at the bottom of the page, below the 'Agreements', 'Search', and 'Dashboard' tabs. The form is titled 'Feedback Form' and includes a 'back' button. The form contains a text area for 'Subject' and a text area for 'Message'. The form is located at the bottom of the page, below the 'Agreements', 'Search', and 'Dashboard' tabs.



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

Send Feedback

4. Once completed, click

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

**Feedback Form: Complete**

Thank you for completing the feedback form

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

## 10. Frequently Asked Questions:

### 1. I have forgotten my login details, what do I need to do?

Email Lease-Desk at [support@lease-desk.com](mailto: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?

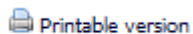
This is to provide additional identification of the agreements nearing the end of term that require urgent action.

### 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](mailto:info@Lease-Desk.com)  
**[www.Lease-Desk.com](http://www.Lease-Desk.com)**