

LEASE-DESK

Super User Manual

Version 1.0



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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.

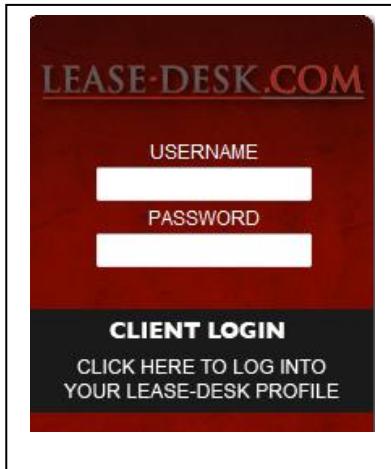
Proctor Consulting's Lease-Desk administration team are responsible for maintaining the software and liaising with the Financial Providers on the Vendors behalf, to ensure all leasing agreement and product information is kept up to date.

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.

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.

A screenshot of the Lease-Desk.com website's user login page. The top navigation bar has 'LEASE-DESK.COM' on the left and a 'Login' button on the right. A dark grey horizontal bar contains the text 'User Login'. Below it, a message says 'Login with your username and password below.' There are two input fields: 'Username:' and 'Password:', both with placeholder text. At the bottom is a blue 'Login' button.

3. Enter your details and click on **Login**

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

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

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

Welcome to Lease-Desk. Details of your Company can be found on this page.

Company Information		Company Type	
Name	Proctor Consulting UK Ltd	SIC Code	(7222) OTHER SOFTWARE
Turnover		Employees	
Credit Rating		Credit Limit	
Analysis Date			

Addresses

Files

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

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

3.1.1. Adding an Address:

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

ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310

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

3. Fill in the full address details and click on **Add A New Address**

Note: (Needs changing to Save Address so new image will be needed on both the above)

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;

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

3.1.2. Editing an Address:

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

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

- Click on Edit Address

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



Logged in as: Chloe Whitbread

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

back

Edit Address

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

Address Name	Lake View Drive
Address Line 1	Sherwood Park
Address Line 2	Nottingham
Address Line 3	
Postcode	NG15 0DT
Telephone	01302 245310

- Amend the required Address details and click on

- 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  Set As Main

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



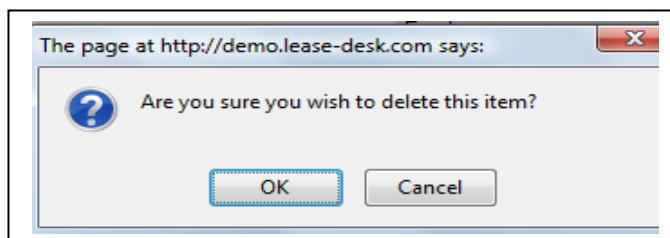
3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;

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

3.1.4. Deleting an Address:

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

2. You will then receive the following message;



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



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

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

3.2.1. Adding a File:

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

Files		
Add File	View File	Delete File
ID	Name	Type

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

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

Logged in as: Chloe Whitbread

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

◀ back

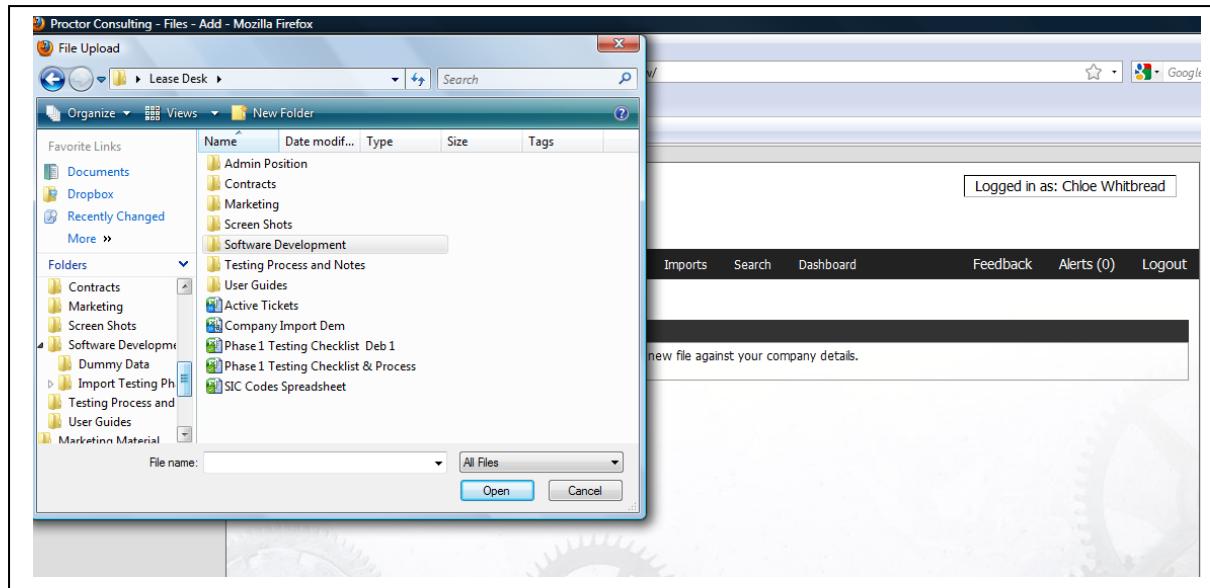
Add a New File

Select Type from the drop down menu and browse to locate and add a new file against your company details.

Please Select ▾

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

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



Add File

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

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

Uploaded file

3.2.2. Viewing a File:

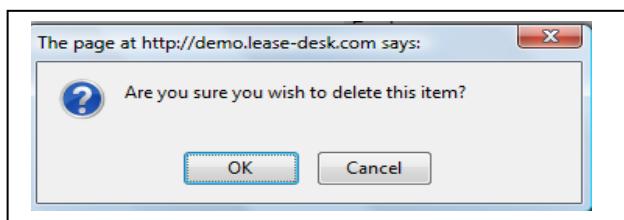
1. To view an existing file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

2. Click **View File**

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;



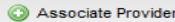
4. Click on OK to delete (or Cancel to cancel action).
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;



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

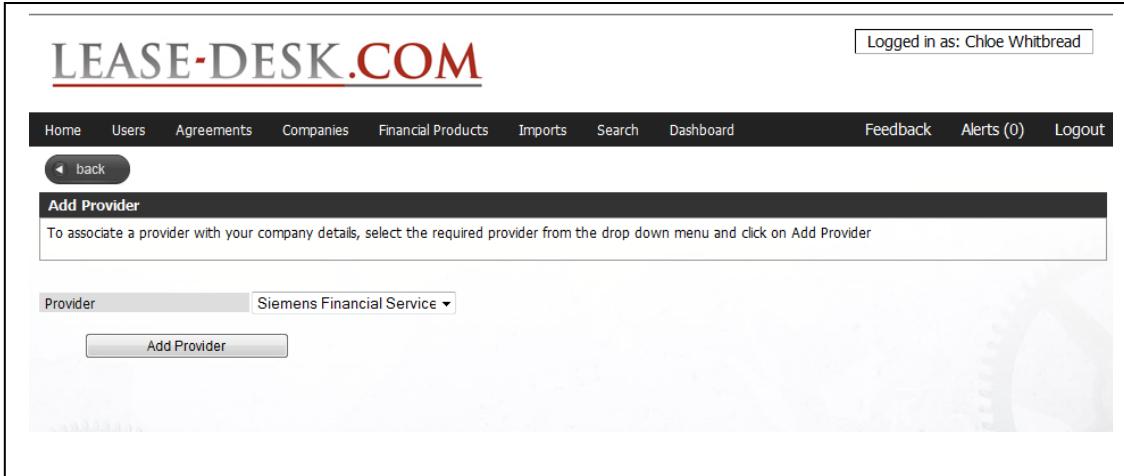
3.3.1. Associating a Provider (Vendor Only):

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

Providers		
 Associate Provider  Edit Provider  Delete Association		
ID	Company ID	Name

2. Click  Associate Provider

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



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

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

3.3.2. Editing a Provider (Vendor Only):

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

2. Click  Edit Provider

3. You will then be presented with the 'Edit Company Details' screen for the selected Provider.
4. Edit the details required from each table, i.e. Addresses, Company Details, Users, Financial Products (see 5.5.1), Files (following same process as indicated previously)

3.3.2. Deleting a Provider Association (Vendor Only):

1. To delete an associated Providers details, go to the Providers table, within the Edit Company Details screen as previously shown and highlight the required Provider.
2. Click  Delete Association
3. You will then be presented with the Confirmation Message. Select OK to delete or Cancel to cancel action.
4. You will then be taken back to the Edit Company Details screen.

3.4. Adding, Editing and Deleting 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.

Note: The Company should auto populate to your Company as you are adding a user to your Companies details.

- 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 Managers at a Vendor or Sales Managers.
- In addition, the Role type selected will determine what rights the user has, for example Super User Admin will have access to all areas with editing functionality, whilst Normal will only have access to their agreement and company information and limited editing rights.

5. Click **Save A New User**

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

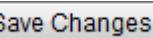


3.4.2. Editing a User:

- 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  Edit User

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

- Amend the required details and click 

- 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:

- 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  Delete User

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;

Products			
	Add Product	Edit Product	Delete Product
ID	Part Number	Name	Manufacturer

2. Click  Add Product

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

Logged in as: Chloe Whitbread

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

Add A New Product

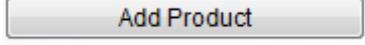
Fill in the details below and click on Add Product, to add a new product to your company details.

Product Name

Part Number

Manufacturer

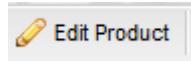
Add Product

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;

LEASE-DESK.COM

Logged in as: Chloe Whitbread

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

◀ back

Edit Product Details

Amend the required Product details below and click on Edit Product, in order to edit the Users information against your company details.

Product Name	Chloe Test 1
Part Number	000001
Manufacturer	Telco

Edit Product

4. Amend the required detail and then click **Edit Product**
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.
2. Click **Delete 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;

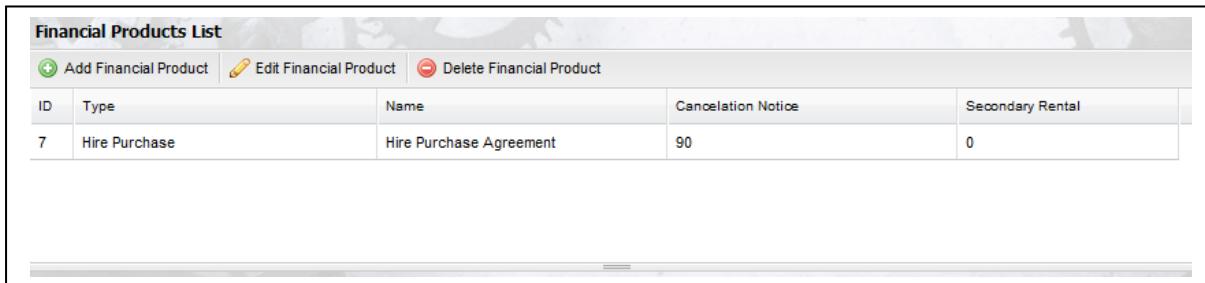


Deleted Product

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;



Financial Products List				
		Add Financial Product	Edit Financial Product	Delete Financial Product
ID	Type	Name	Cancellation Notice	Secondary Rental
7	Hire Purchase	Hire Purchase Agreement	90	0

2. Click  **Add Financial Product**

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

LEASE-DESK.COM

Logged in as: Chloe Maxwell

[Home](#) [Users](#) [Agreements](#) [Companies](#) [Financial Products](#) [Imports](#) [Search](#) [Dashboard](#) [Feedback](#) [Alerts \(0\)](#) [Logout](#)
[back](#)**Add A New Financial Product**

Fill in the details below and click on Add Financial Product, to add a new product to your company details.

Provider Name	Borrow Financial Services ▾
Financial Product Type	Please Select ▾
Financial Product Name	
Term Of Contract	Please Select ▾

Insurance Required	Please Select ▾
Insurance Action	Please Select ▾
Settlement Calculation	Please Select ▾
Settlement Discount (%)	
Upgrade Calculation	Please Select ▾
Upgrade Discount (%)	

Cancellation Notice	Please Select ▾
Secondary Rental	Please Select ▾
Term End Action	Please Select ▾

[Add Product](#)

4. Fill in the following Financial Product Details;

- **Provider Name:** (From the drop down menu)
- **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
- **Cancellation 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)
- **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:** i.e. 3% (normally specified in Financial Providers T's & C's)
- **Settlement Discount:** (This will be either Rule of 78 or Rental Stream)
- **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 [Add Product](#)

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

The screenshot shows the 'Edit Financial Product Details' page. At the top, it says 'Logged in as: Chloe Maxwell'. Below that is a navigation bar with links: Home, Users, Agreements, Companies, Financial Products (which is highlighted in red), Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A 'back' button is also present. The main area has a title 'Edit Financial Product Details'. It contains two sets of form fields. The left set includes: Provider Name (Borrow Financial Services), Financial Product Type (Finance Lease), Financial Product Name (Chloe Test), and Term Of Contract (Fixed Period). The right set includes: Insurance Required (Yes), Insurance Action (Provide Policy), Settlement Calculation (Rule Of 78), Settlement Discount (%)(2), Upgrade Calculation (Rule Of 78), and Upgrade Discount (%)(2). Below these are sections for 'Cancellation Notice' (0), 'Secondary Rental' (Yes), 'Term End Action' (No Action), and a 'Save Changes' button. At the bottom, there's a 'Files' section with options to Add File, View File, or Delete File, and a table for managing files with columns ID, Name, and Type.

4. Amend the required details and click

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

Id	Name	Type	Postcode	Telephone
127	1AHOWES Estate Agents	Customer	CM2 0YP	01245 366 385
96	A A Manufacturing Ltd	Customer	LS1 0AA	0113 600 6000
148	A-Z Tax's Ltd	Customer	NG1 0DL	0115 263 717
149	ABC University	Customer	HP3 3ST	01442 850 131
142	Adva Logistics Ltd	Customer	LS1 0AA	0113 421 444
109	Alpha Media Ltd	Customer	NG1 4BY	0115 882 301
111	AT Manufacturing	Customer	M17 2EU	01908 444 123
139	Barkers Financials Ltd	Customer	EC1 0FF	0207 100 1000

Displaying 1 to 40 of 75 items

1. Click on **Add Company**
2. You will then be presented with the 'Add a new Company Screen' as indicated on the next page.

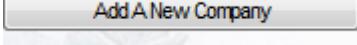
3. Complete the following fields;

- 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.)

4. And if known the following additional details;

- SIC Code
- Turnover
- Company Registration
- Employees
- Credit Rating
- Credit Limit
- Analysis Date (This is the date entered when the Credit Limit and Rating have been checked)

Add A New Company

5. Once completed, click on  to save the details.

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

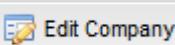
 Created new Company

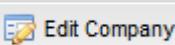
4.2. Editing a Company:

1. Follow previous steps 1 and 2.

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

(For help on how to use the quick search option, go to step....)

 Edit Company

3. Click on 

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

The screenshot shows the 'Edit Company Details' page. At the top, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A message 'Logged in as: Chloe Whitbread' is displayed. Below the navigation is a 'back' button. The main content area has a header 'Edit Company Details' and a sub-instruction 'Edit the required Company Details via the individual tables below, i.e. Addresses, Files etc.' Under 'Company Information', there's a table with fields for Name (1AHOWES Estate Agents), Company Type (Customer), SIC Code ((7031) REAL ESTATE AGT), Turnover (1,860,346.00), Employees (24), Credit Rating (75), Credit Limit (150,000.00), and Analysis Date (23/05/2004). Below this are two tables: 'Addresses' (with columns ID, Name, Address, Post Code, Telephone) containing one row (ID 120, Name 67 Field Street, Address 67 Field Street, Chelm, CM2 0YP, Telephone 01245 366 385) and 'Files' (with columns ID, Name, Type).

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)
- **Financial Products** (if Company is a Financial Provider),
- **Products** (if Company is a Vendor)

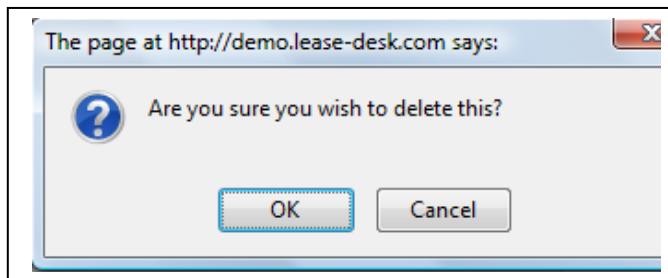
6. for how to Add, Edit, View or Delete any table, follow the relevant process in chapter 5.

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 all everything related to them (Products / Users / Company association) when they aren't used in 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;



Note: If there are associated records against a company, for example, Addresses, Files, Products, Financial Products or Users, you will need to individually delete these prior to deleting a Company.

4.4. Viewing a Company:

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



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
169	Winston Armani	winston.armani@lease-desk.com	Second Telco Channel Ltd	No		
212	Reece Ashworth	reece.ashworth@lease-desk.com	AT Manufacturing	No		
202	Mike Baldwin	mike.baldwin@lease-desk.com	DD Financial Systems Ltd	No		
221	Katy Ball	katy.ball@lease-desk.com	PP Media Ltd	No		
215	Sarah Barnes	sarah.barnes@lease-desk.com	Budget Hotel Ltd	No		
170	Mark Bell	mark.bell@lease-desk.com	Second Telco Channel Ltd	No		
198	Harold Bishop	harold.bishop@lease-desk.com	DD Financial Holdings Ltd	No		

Groups List

Id	Name	Total Members
----	------	---------------

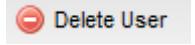
3. Click on **Add User**
4. You will then be presented with the 'Add a User Screen'.
5. Follow points within the previous chapter, '**3.4.1. Adding a User**'

5.2. Editing a User:

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

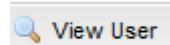
2. Follow points within the previous chapter, '**3.4.2. Editing a User**'

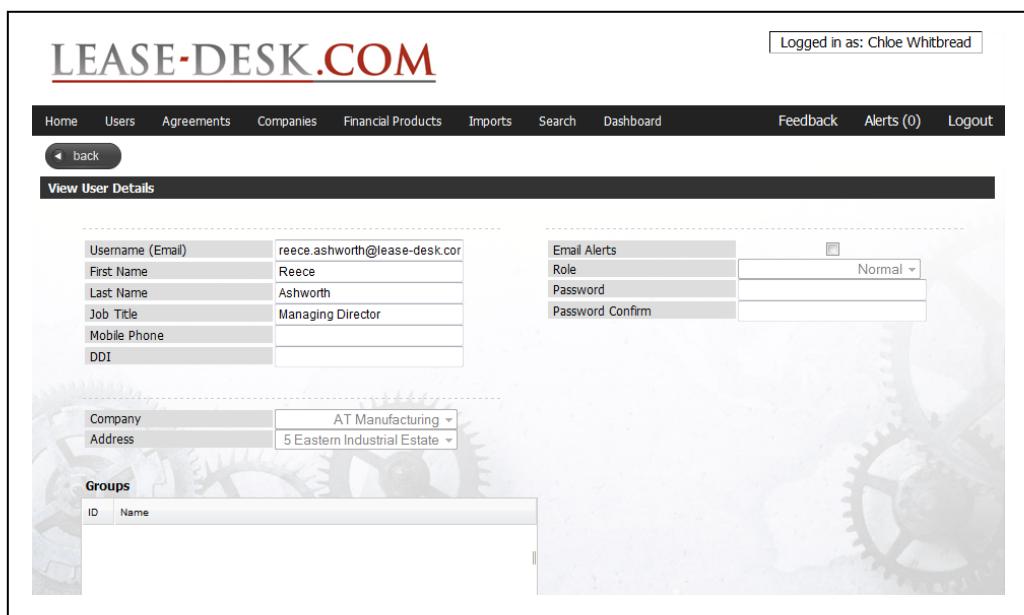
5.3. Deleting a User:

1. To delete a user, highlight the required user and then click on 
2. Follow points within the previous chapter, '**3.4.3. Deleting a User**'

Note: User removal will delete all everything related to them (alerts/ group association) when they aren't used in 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;



The screenshot displays the 'View User Details' page of the LEASE-DESK.COM application. At the top, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A message 'Logged in as: Chloe Whitbread' is shown in the top right. Below the navigation, a 'View User Details' header is followed by a form containing the following data:

Username (Email)	reece.ashworth@lease-desk.co.uk
First Name	Reece
Last Name	Ashworth
Job Title	Managing Director
Mobile Phone	
DDI	

On the right side of the form, there are fields for Email Alerts, Role (set to Normal), Password, and Password Confirm.

Below the main form, there's another section for Company and Address:

Company	AT Manufacturing
Address	5 Eastern Industrial Estate

At the bottom left, there's a 'Groups' section with a table showing assigned groups:

ID	Name

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 to share their information which is 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.

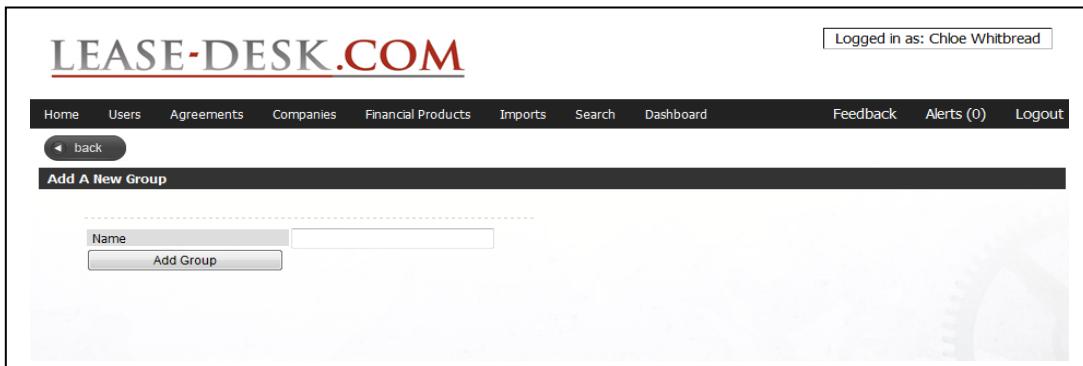
6.1. Adding a Group:

1. From the Main Users screen as previously shown, go to the Groups List at the bottom half of the screen as indicated below;

Groups List		Total Members
	Name	
2	Chloe Test 1	0

2. Click  Add Group

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



Add Group

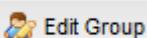
4. Add the new Group Name and then click
5. You will then be taken back to the main Users/Groups screen and will be presented with the following confirmation message;



Created new Group

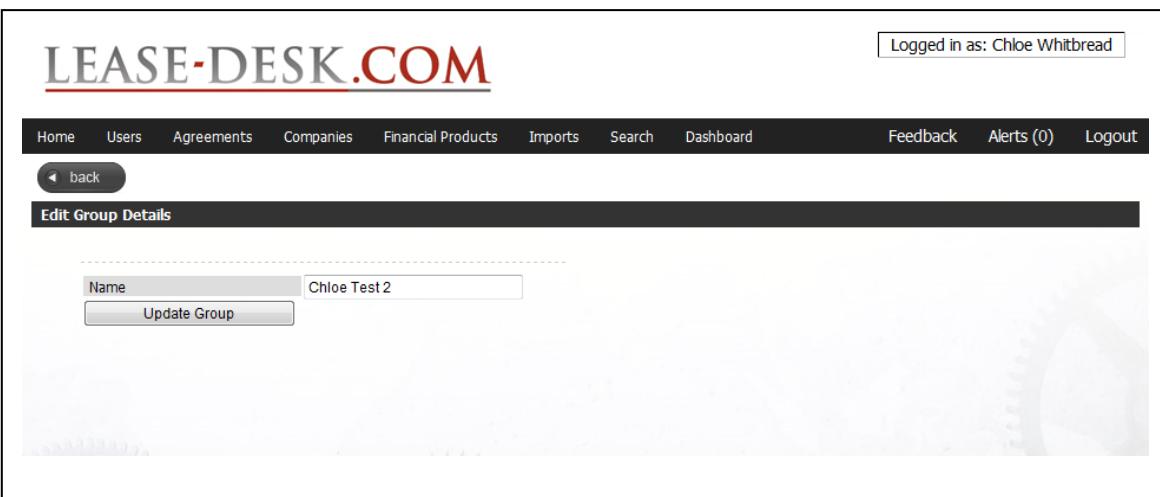
6.2. Editing a Group:

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

**Edit Group**

2. Click

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



The screenshot shows the 'Edit Group Details' page of the LEASE-DESK.COM application. At the top, there is a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A user is logged in as 'Chloe Whitbread'. Below the navigation bar, there is a 'back' button and a title 'Edit Group Details'. The main form contains a 'Name' field with the value 'Chloe Test 2' and an 'Update Group' button. The background features a faint watermark of a person's face.

4. Amend the details and then click
5. You will then be taken back to the main Users/Groups List screen and presented with the following confirmation message;



Updated Group

6.3. Deleting a Group:

Note: Group removal will delete the user associations, whether or not they are used in agreements.

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



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;

A screenshot of the Lease-Desk.com software interface showing the 'View Members' screen. The top navigation bar includes 'Home', 'Users', 'Agreements', 'Companies', 'Financial Products', 'Imports', 'Search', 'Dashboard', 'Feedback', 'Alerts (0)', and 'Logout'. A 'Logged in as: Chloe Whitbread' message is in the top right. Below the navigation is a 'View Members' header with a back button. The main area shows a table titled 'Chloe Test' with one row:

ID	Name	Company	Role
2	Emily Bishop	DD Financial Systems (North) Ltd	Writer

6.5. Editing Members:

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



click on

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

A screenshot of the 'Edit Members' interface. At the top, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. Below that is a back button and the title 'Edit Members'. On the left, there's a sidebar with tabs for 'Company' (selected) and 'User'. A dropdown menu labeled 'Please Select' is open. At the bottom, there's a table titled 'Chloe Test' showing one row for 'Emily Bishop' with ID 2, Name 'Emily Bishop', Company 'DD Financial Systems (North) Ltd', and Role 'Writer'. There's also a 'Remove Member' link and an 'Add' button.

3. Select the Company from the drop down box which will bring up the users within that Company.

4. Highlight the required User, and then select a Role from the drop down menu, as indicated on the following page.

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)

Edit Members

Add new members to the group for the associated company here, selecting their specific role type or remove existing members from the group.

- **Reader:** Can view all agreements associated with the group.
- **Writer:** Associates the users agreements with the group, however the user does not see the group.
- **Read/Writer:** Associates the users agreements with the group, and also allows the user to view the groups agreements.

Company	Please Select ▾
User	

Role

Add

3rd Telco Channel

Remove Member

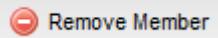
ID	Name	Company	Role

6. Click **Add**

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

Chloe Test			
Remove Member			
ID	Name	Company	Role
2	Emily Bishop	DD Financial Systems (North) Ltd	Writer
3	Roy Evans	DD Financial Systems Ltd	Reader

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



9. You will then receive a confirmation message, click OK to continue with deletion or Cancel to cancel the action.

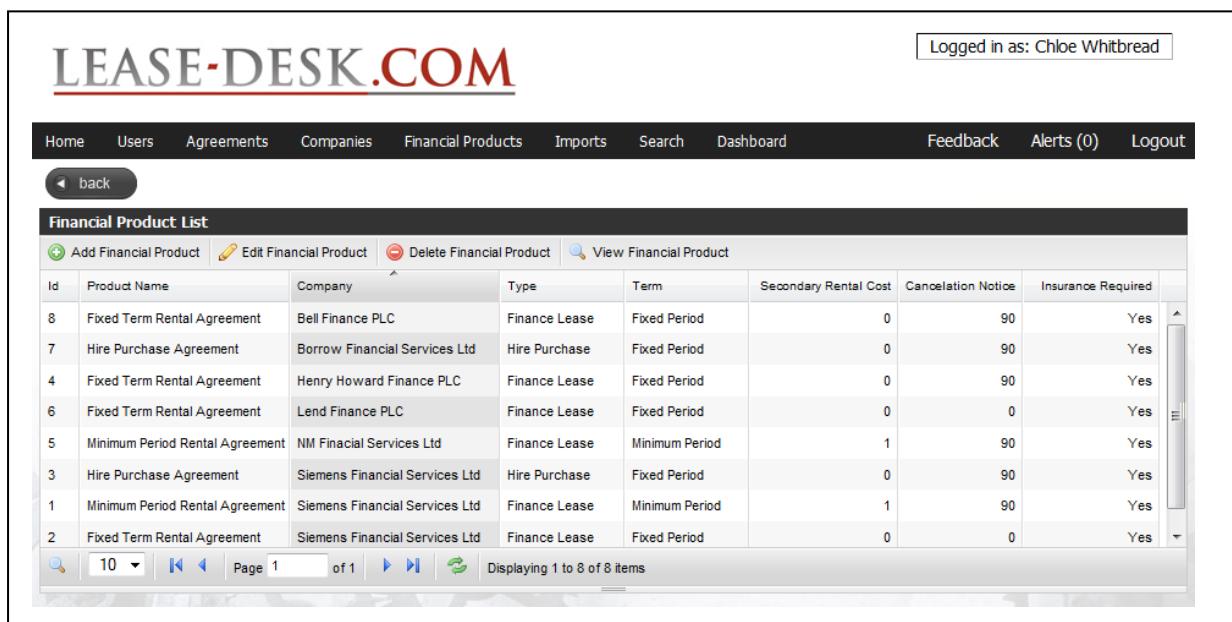
10. You will then be taken back to the main Users/Groups list screen.

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

7.1. Adding a Financial Product:

1. Select **Financial Products** from the top main menu.

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



Financial Product List							
	Add Financial Product	Edit Financial Product	Delete Financial Product	View Financial Product			
ID	Product Name	Company	Type	Term	Secondary Rental Cost	Cancellation Notice	Insurance Required
8	Fixed Term Rental Agreement	Bell Finance PLC	Finance Lease	Fixed Period	0	90	Yes
7	Hire Purchase Agreement	Borrow Financial Services Ltd	Hire Purchase	Fixed Period	0	90	Yes
4	Fixed Term Rental Agreement	Henry Howard Finance PLC	Finance Lease	Fixed Period	0	90	Yes
6	Fixed Term Rental Agreement	Lend Finance PLC	Finance Lease	Fixed Period	0	0	Yes
5	Minimum Period Rental Agreement	NM Financial Services Ltd	Finance Lease	Minimum Period	1	90	Yes
3	Hire Purchase Agreement	Siemens Financial Services Ltd	Hire Purchase	Fixed Period	0	90	Yes
1	Minimum Period Rental Agreement	Siemens Financial Services Ltd	Finance Lease	Minimum Period	1	90	Yes
2	Fixed Term Rental Agreement	Siemens Financial Services Ltd	Finance Lease	Fixed Period	0	0	Yes

Displaying 1 to 8 of 8 items

3. Click **Add Financial Product**

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

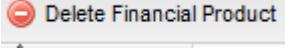
5. Follow points in Chapter **3.6.1.Adding a Financial Product**

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:

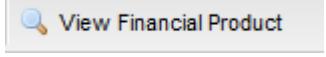
Note: If a Financial Product is associated with a Live Agreement, you will not be able to delete it.

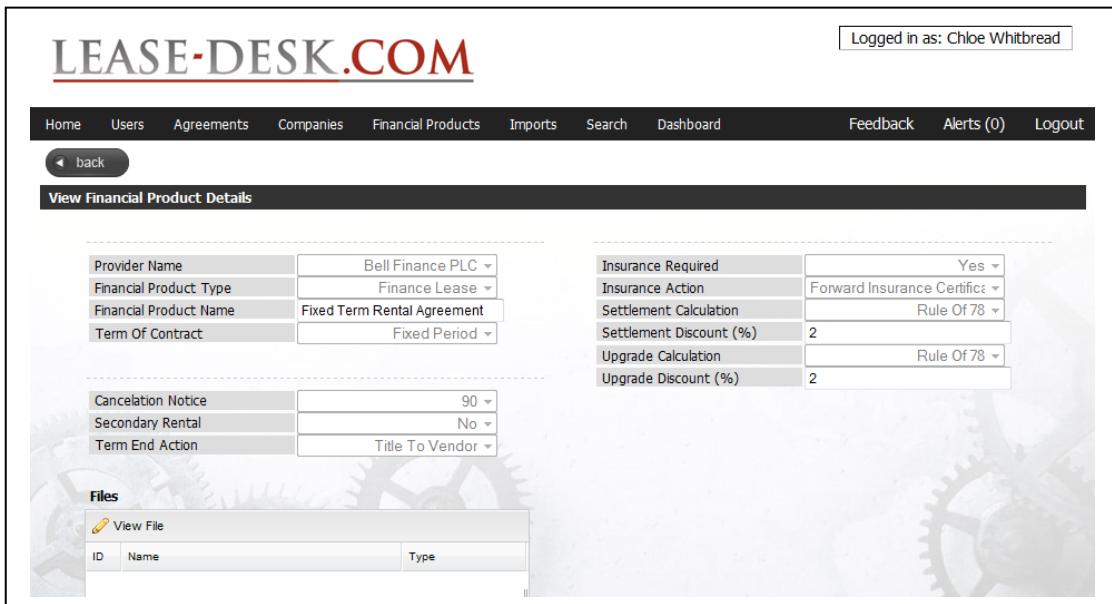
1. Highlight the required Financial Product and click 
2. You will then be presented with a confirmation message. Select OK to continue with the deletion or Cancel to cancel the action.
3. Once the deletion has been confirmed, you will be taken back to the main Financial Products List screen and you will be presented with the following confirmation message;



 Deleted Financial Product

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;



The screenshot shows the 'View Financial Product Details' page of the LEASE-DESK.COM application. At the top right, it says 'Logged in as: Chloe Whitbread'. The main area contains several input fields grouped into two columns. The left column includes fields for 'Provider Name' (Bell Finance PLC), 'Financial Product Type' (Finance Lease), 'Financial Product Name' (Fixed Term Rental Agreement), and 'Term Of Contract' (Fixed Period). The right column includes fields for 'Insurance Required' (Yes), 'Insurance Action' (Forward Insurance Certificate), 'Settlement Calculation' (Rule Of 78), 'Settlement Discount (%)' (2), 'Upgrade Calculation' (Rule Of 78), and 'Upgrade Discount (%)' (2). Below these, there are sections for 'Cancellation Notice' (90), 'Secondary Rental' (No), 'Term End Action' (Title To Vendor), and a 'Files' section with a 'View File' button.

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

8.1. Adding an Agreement (Live):

1. Select **Agreements** from the top main menu.

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

Agreement List

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

Agreement List						
Actions		Identifier	Company	Status	Primary User	RBO Level
	Add Agreement	38 TEST1012	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00
	Edit Agreement	39 TEST1013	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00
	Delete Agreement	28 Y1111100000	A-Z Taxi's Ltd	Live	Janine Holler	85192.60
	View Agreement	33 IMPORT101	ABC University	Live	John Ross	16044.58
	Edit Calculation	22 111209AL	Adva Logistics Ltd	Live	Shelley Thompson	47557.12
	View Log	6 119123980	Alpha Media Ltd	Live	Mark Gilson	13202.63
	View Log	8 0000/123	AT Manufacturing	Prospect	Reece Ashworth	0.00
	View Log	19 111209BF	Barkers Financials Ltd	Live	Charlotte Smith	170058.13

Displaying 1 to 37 of 37 items

3. Click

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

Add a new Agreement

Customer

Customer	Please Select ▾
User	Please Select ▾

Provider

Provider	None ▾
----------	--------

Create A New Customer

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. Click 'Create a New Customer' to take you to the relevant screen if required.

Customer:

- **Customer**
- **User (at Customer)**

Provider:

- **Provider**
- **User (at Provider)**

As indicated below:

The screenshot shows a software interface for managing customer and provider details. It is divided into two main sections: 'Customer' and 'Provider'.
Customer Section:
- A 'Customer' dropdown menu is open, showing 'TT Engineering Ltd' as the selected option.
- A 'User' dropdown menu is open, showing 'Harry George' as the selected option.
Provider Section:
- A 'Provider' dropdown menu is open, showing 'Siemens Financial Service' as the selected option.
- A 'User' dropdown menu is open, showing 'Martine Williams' as the selected option.
- A 'Contract' dropdown menu is open, showing 'Please Select' as the selected option.
- Below these dropdowns are two buttons: 'Continue' and 'Create A New Customer'.
- In the bottom left corner of the interface, there is a watermark or logo of a gear.

6. This will then generate a further drop down menu for the Financial Product type associated with the chosen Provider, as indicated below;

A screenshot of a software interface showing a 'Contract' dropdown menu. The menu is open, and the option 'Hire Purchase Agreement' is highlighted with a dotted blue border, indicating it is the selected choice.

7. Then click **Continue**

Continue

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

The screenshot shows the 'Add a new Agreement' interface. At the top, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. Below the navigation is a 'back' button. The main area has two sections: 'Companies' and 'Financial Product'. The 'Companies' section contains a table with two rows: one for A A Manufacturing Ltd (User: Catherine Parker, Type: Customer) and another for NM Financial Services Ltd (User: Mary Smith, Type: Provider). The 'Financial Product' section contains a table with one row: Minimum Period Rental Agreement (Notice: 90, Type: Finance Lease). At the bottom, there's a table for entering vendor information with columns for Vendor, User, Product, Part, Quantity, and Value. It includes dropdowns for 'Select Vendor' and 'Select Vendor User', and buttons for 'Continue', 'Add Another Product', and a 'Total' field showing 0.00.

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

This screenshot shows a detailed view of the vendor and product entry form. It includes dropdown menus for 'Vendor' (Voice Communications Ltd) and 'User' (Sarah Cooper), and input fields for 'Product' (Grey Handset V1), 'Part' (51012283), 'Quantity' (1), and 'Value' (258.00). Below the table are 'Continue' and 'Add Another Product' buttons, and a 'Total' field showing 0.00.

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

Continue

Add Another Product

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

Contract Terms	
Agreement Identifier	
Payment Type	Please Select ▾
Rate	Please Select ▾
Interest Rate	
Rate Per 1000	
Profile: Initial Payment	
Profile: Regular Payment	
Payment Frequency	Please Select ▾
Initial Payment	
Regular Payment	
First Payment Date	
Status	Please Select ▾
Prospect	None ▾
Expected Close Date	
End of Term	
Secondary Rental	
Residual Value	
Continue	

14. Fill in the following details;

- Agreement Identifier (if known)
- Payment Type: Advance or Arrears
- Rate: Interest Rate or Rate per Thousand

Interest Rate: or

Rate per Thousand:

- Profile: Initial Payment (whether it's 1 or 3 payments)
- Profile: Regular Payment (how many remaining payments after initial)
- Payment Frequency: Monthly, Quarterly or Annually

Note: Lease-Desk will then calculate the initial and regular payments from the information previously added above and product information 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

Continue

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

 Created new Agreement

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.

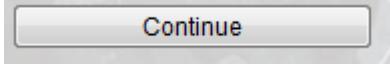
If the product isn't specified in detail at this point, select the default part number 'LD001'

(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:

3. Then click on

 Continue

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

 Created new Agreement

8.3. 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;

Edit Agreement Details																														
Amend the required fields below and click on Save Changes to save edited information.																														
Vendors <table border="1"> <thead> <tr> <th colspan="4">Edit Vendor</th> </tr> <tr> <th>ID</th> <th>Name</th> <th>Primary Contact</th> <th>Tele</th> </tr> </thead> <tbody> <tr> <td>136</td> <td>Data Communications Ltd</td> <td>Warren Fox</td> <td>016</td> </tr> </tbody> </table>						Edit Vendor				ID	Name	Primary Contact	Tele	136	Data Communications Ltd	Warren Fox	016													
Edit Vendor																														
ID	Name	Primary Contact	Tele																											
136	Data Communications Ltd	Warren Fox	016																											
Customer <table border="1"> <tr> <td>Customer</td> <td>A A Manufacturing Ltd</td> </tr> <tr> <td>User</td> <td>Catherine Parker</td> </tr> </table>						Customer	A A Manufacturing Ltd	User	Catherine Parker																					
Customer	A A Manufacturing Ltd																													
User	Catherine Parker																													
Provider <table border="1"> <tr> <td>Provider</td> <td>Borrow Financial Services</td> </tr> <tr> <td>User</td> <td>Chloe Maxwell</td> </tr> <tr> <td>Contract</td> <td>Hire Purchase Agreement</td> </tr> </table>						Provider	Borrow Financial Services	User	Chloe Maxwell	Contract	Hire Purchase Agreement																			
Provider	Borrow Financial Services																													
User	Chloe Maxwell																													
Contract	Hire Purchase Agreement																													
Contract Terms <table border="1"> <tr> <td>Agreement Identifier</td> <td>TEST1013</td> </tr> <tr> <td>Payment Type</td> <td>Arrears</td> </tr> <tr> <td>Rate</td> <td>Interest Rate</td> </tr> <tr> <td>Interest Rate</td> <td>11.40%</td> </tr> <tr> <td>Rate Per 1000</td> <td>99.56</td> </tr> <tr> <td>Profile: Initial Payment</td> <td>1</td> </tr> <tr> <td>Profile: Regular Payment</td> <td>11</td> </tr> </table>						Agreement Identifier	TEST1013	Payment Type	Arrears	Rate	Interest Rate	Interest Rate	11.40%	Rate Per 1000	99.56	Profile: Initial Payment	1	Profile: Regular Payment	11											
Agreement Identifier	TEST1013																													
Payment Type	Arrears																													
Rate	Interest Rate																													
Interest Rate	11.40%																													
Rate Per 1000	99.56																													
Profile: Initial Payment	1																													
Profile: Regular Payment	11																													
Products <table border="1"> <thead> <tr> <th colspan="2">Add Product</th> <th colspan="3">Delete Product</th> </tr> <tr> <th>ID</th> <th>Vendor</th> <th>Name</th> <th>Price</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td>63</td> <td>Data Comm</td> <td>Voicemail System Card</td> <td>9.99</td> <td>850</td> </tr> <tr> <td>64</td> <td>Data Comm</td> <td>Power Supply For Handsets</td> <td>19.99</td> <td>500</td> </tr> <tr> <td>65</td> <td>Data Comm</td> <td>Power Supply For Handsets UK</td> <td>19.99</td> <td>500</td> </tr> </tbody> </table>						Add Product		Delete Product			ID	Vendor	Name	Price	Quantity	63	Data Comm	Voicemail System Card	9.99	850	64	Data Comm	Power Supply For Handsets	19.99	500	65	Data Comm	Power Supply For Handsets UK	19.99	500
Add Product		Delete Product																												
ID	Vendor	Name	Price	Quantity																										
63	Data Comm	Voicemail System Card	9.99	850																										
64	Data Comm	Power Supply For Handsets	19.99	500																										
65	Data Comm	Power Supply For Handsets UK	19.99	500																										
Files <table border="1"> <tr> <td>File 1</td> </tr> </table>						File 1																								
File 1																														

4. You are then presented with various tables you are able to edit. Once details have been amended, click **Save Changes**

8.3.1 Editing a Vendor:

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

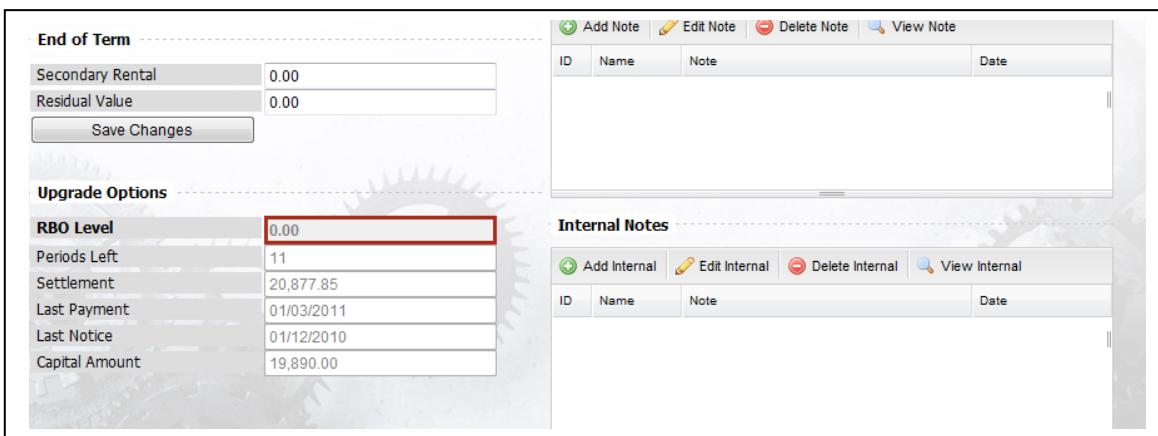
2. Click  and follow chapter **6.2. Editing a Company**:

8.3.2 Adding and Deleting a Product:

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

8.3.3 Adding, Viewing and Deleting a File:

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



The screenshot shows a software interface for managing lease agreements. On the left, there are two main sections: 'End of Term' and 'Upgrade Options'. The 'End of Term' section contains fields for 'Secondary Rental' (0.00) and 'Residual Value' (0.00), with a 'Save Changes' button below. The 'Upgrade Options' section lists several variables: RBO Level (0.00), Periods Left (11), Settlement (20,877.85), Last Payment (01/03/2011), Last Notice (01/12/2010), and Capital Amount (19,890.00). To the right of these sections are two tables: 'Internal Notes' and 'External Notes'. Both tables have columns for ID, Name, Note, and Date. The 'Internal Notes' table is currently empty, while the 'External Notes' table also appears to be empty.

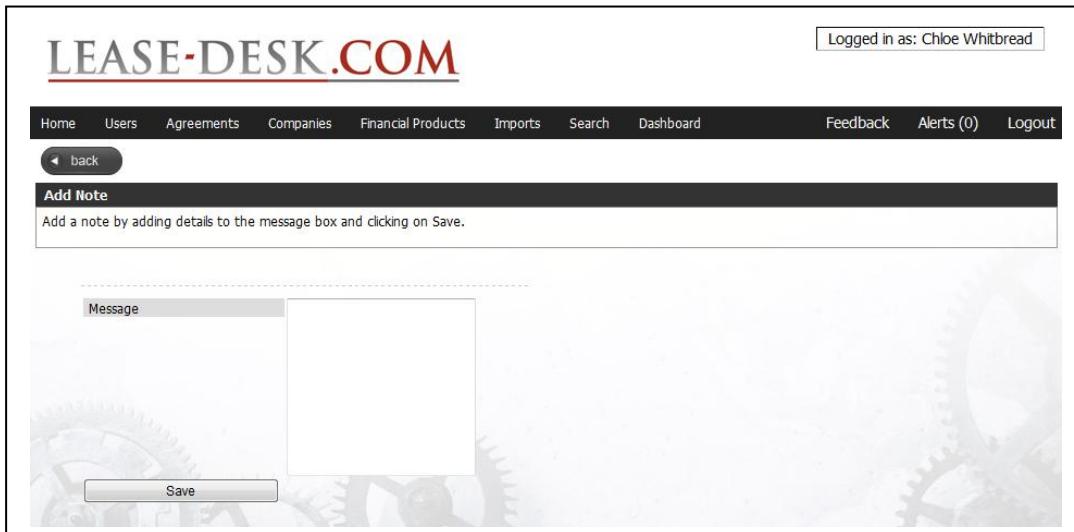
8.3.4 Adding a Note:

Note: When a note is added to an Agreement, an email alert will be generated to all members associated with the Agreement, including administrators.

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

2. Click  Add Note

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



The screenshot shows the 'Add Note' page of the LEASE-DESK.COM application. At the top, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A user is logged in as 'Chloe Whitbread'. The main content area has a dark header bar with the text 'Add Note'. Below this, a message box contains the instruction: 'Add a note by adding details to the message box and clicking on Save.' There's a large input field labeled 'Message' where users can type their note. At the bottom of the input field is a 'Save' button.

4. Type your message into the blank box

5. Click  Save

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

8.3.5 Editing a Note:

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

2. Click  Edit Note

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

LEASE-DESK.COM

Logged in as: Chloe Whitbread

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

[back](#)

Edit Note Details

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

Username	Chloe Whitbread
Message	Test

Save

4. Amend the Message

5. Click

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

8.3.6 Deleting a Note:

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

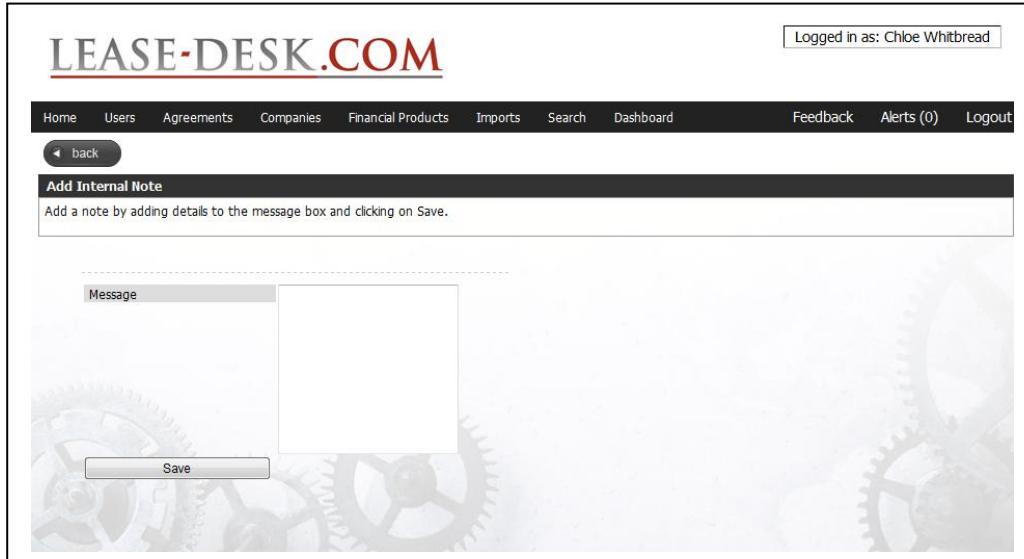
2. Click

8.3.7 Adding an Internal Note:

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

2. Click

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



4. Enter your message in the box.

5. Click Save

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

8.3.8 Editing an Internal Note:

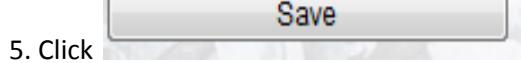
1. Highlight the required note from the Internal Notes Table on the 'Edit Agreement' screen.

2. Click Edit Internal Note

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

The screenshot shows the 'Edit Note Details' page of the LEASE-DESK.COM application. At the top right, it says 'Logged in as: Chloe Whitbread'. The main area has a dark header bar with 'Edit Note Details'. Below it, a message says 'Amend a current note by editing details within the message box and clicking on Save.' There are two input fields: 'Username' containing 'Chloe Whitbread' and 'Message' containing 'Test'. At the bottom left is a 'Save' button.

4. Amend the required message.

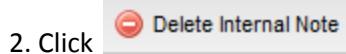


5. Click

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

8.3.9 Deleting an Internal Note:

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



2. Click

8.4. 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;

The screenshot shows the 'Agreement List' page of the LEASE-DESK.COM application. At the top right, it says 'Logged in as: Chloe Whitbread'. Below the header, there's a navigation bar with links for Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A 'back' button is also present. The main content area is titled 'Agreement List' and contains a table of current and pending customer agreements. The table has the following data:

ID	Identifier	Company	Status	Primary User	RBO Level	End Date
39	TEST1013	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00	14/10/2012
33	IMPORT101	ABC University	Dead	John Ross	16044.58	01/11/2012
44	TEST1018	ABC University	Dead	Neal Hutchinson	3121.35	15/12/2010
22	111209AL	Adva Logistics Ltd	Live	Shelley Thompson	47557.12	15/12/2010
6	119123980	Alpha Media Ltd	Live	Mark Gilson	13202.63	01/07/2010
8	0000/123	AT Manufacturing	Prospect	Reece Ashworth	0.00	14/01/2014
19	111209RF	Barkers Financials Ltd	Live	Charlotte Smith	170058.13	01/09/2010

An 'Delete Agreement' button is highlighted with a red box and a cursor icon.

2. Click

8.5. 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;

The screenshot shows the 'View Agreement' page of the Lease-Desk.com software. It includes sections for Contract Terms, Companies, Financial Product, and Products. The 'Contract Terms' section contains fields like Internal Agreement Id (374), Agreement Identifier (756-0374), Payment Type (Advance), Interest Rate (12.00%), Rate Per 1000 (97.54), Profile: Initial Payment (1), Profile: Regular Payment (11), Payment Frequency (Quarterly), Initial Payment (2,194.65), Regular Payment (2,194.65), First Payment Date (10/12/2007), Status (Live), Prospect (None), and Expected Close Date. The 'Companies' section lists three entries: 1AHOWE & Estate Agents (User Nikki Reed, Type Customer), NM Financial Services Ltd (User Mary Smith, Type Provider), and Second Telco Channel Ltd (User Mike Versace, Type Vendor). The 'Financial Product' section shows a single entry: Minimum Period Rental Agreement (Notice 90, Type Finance Lease). The 'Products' section displays a table with one row: ID 1284, Vendor Second Telco, Name Additional Pretend Part B, Price 22500.00, Quantity 1, Value 22500.00, and a Total row. The 'Files' section has an 'Add File' button and a 'View File' link.

Note: Upgrade Options:

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

8.6. Viewing an Audit Log:

1. Highlight the required Agreement from the main Agreement Lists screen as indicated previously.
2. Click **View Log**
3. You will then be presented with the 'View Audit Log' screens which details all user action against the selected Agreement, as indicated on the following page;

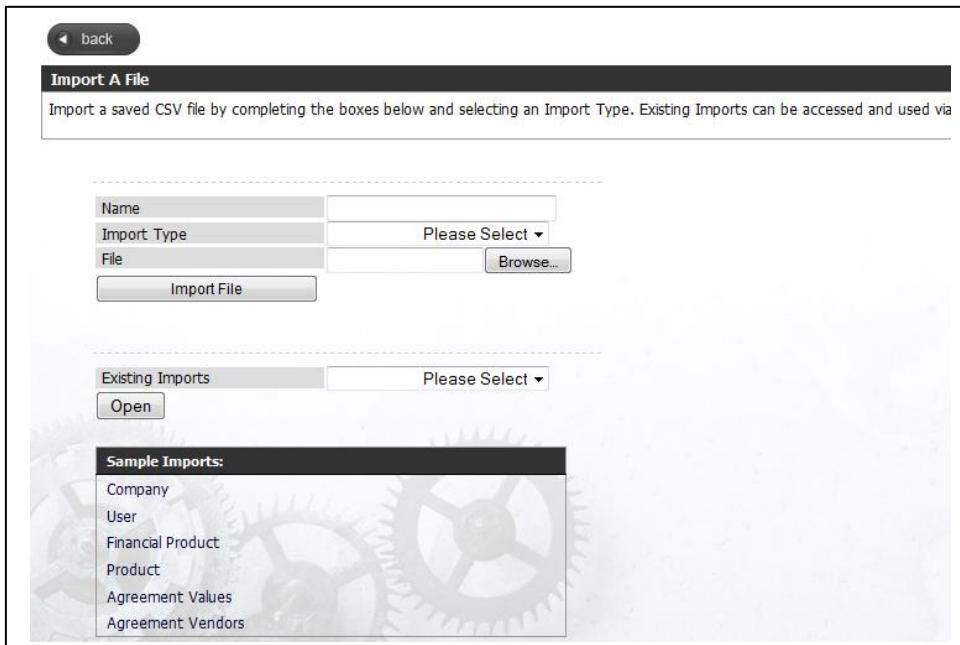
The screenshot shows the 'View Audit Log' section of the Lease-Desk.com interface. At the top right, it says 'Logged in as: Chloe Whitbread'. Below the header, there's a navigation bar with links: Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (0), and Logout. A 'back' button is also present. The main content area is titled 'View Audit Log' and contains a table with three columns: Name, Date, and Action. The table lists several entries for user 'Debra Taylor' with specific timestamps and detailed actions.

Name	Date	Action
Debra Taylor	2010-01-15 09:57:16	Field: Payment Type was updated, previously read: start Field: Interest Rate was updated, previously read: 10
Debra Taylor	2010-01-15 09:56:40	Field: Payment Type was updated, previously read: start Field: Interest Rate was updated, previously read: 10 Field: Status was updated, previously read: Live
Debra Taylor	2010-01-14 14:32:05	User created product with id: 39
Debra Taylor	2010-01-14 14:25:22	Removed product with id: 38, Vendor: Sarah Cooper (Voice Communications Ltd), Product: Black Handset V1 2 2000.00
Debra Taylor	2010-01-14 14:16:55	User created product with id: 37

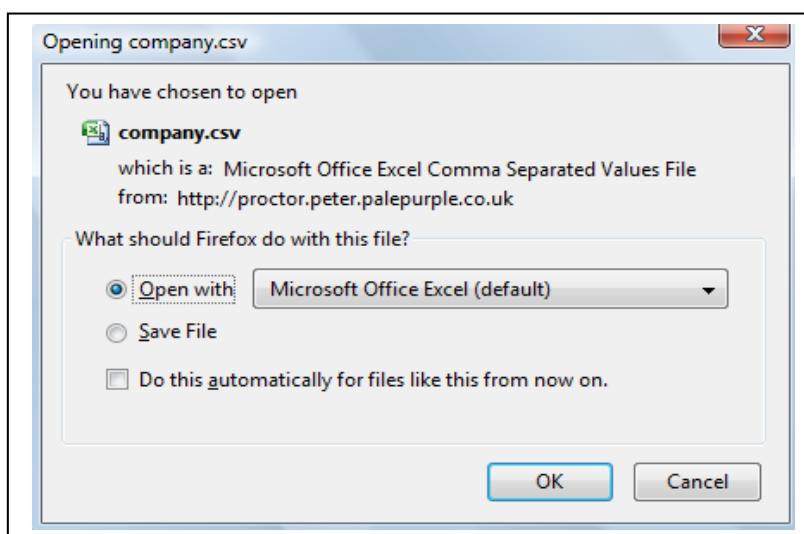
9. Imports:

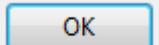
9.1. Viewing an Audit Log:

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 imports, for example, Company, Users etc.
2. To Import a file, firstly select **Imports** from the top main menu.
3. You will then be presented with the 'Import a File' screen as indicated on the following page;

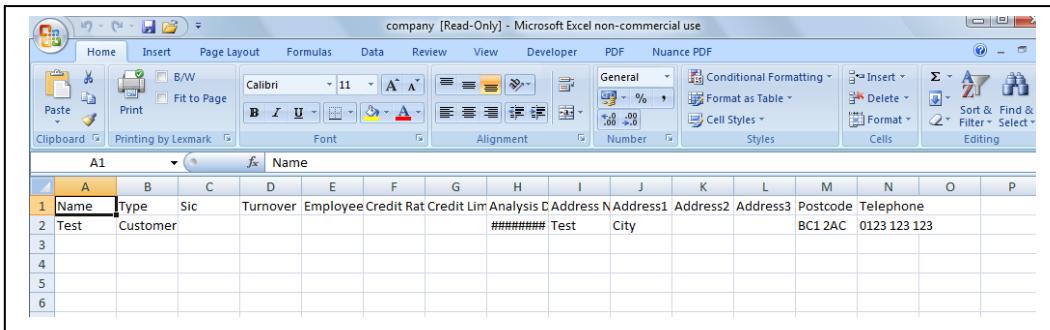


4. There are six different types of imports available within Lease-Desk. You will find the Sample Import templates on the 'Import a File' screen as indicated above. To select one, click on the title, for example 'Company'.
5. **Note:** Always ensure you follow the import order specified on the Import a File Page as above, i.e. Company first, and then Users, otherwise import will fail.
6. You will then be presented with the following pop screen for opening the CSV template;



7. Click  to open with Excel

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

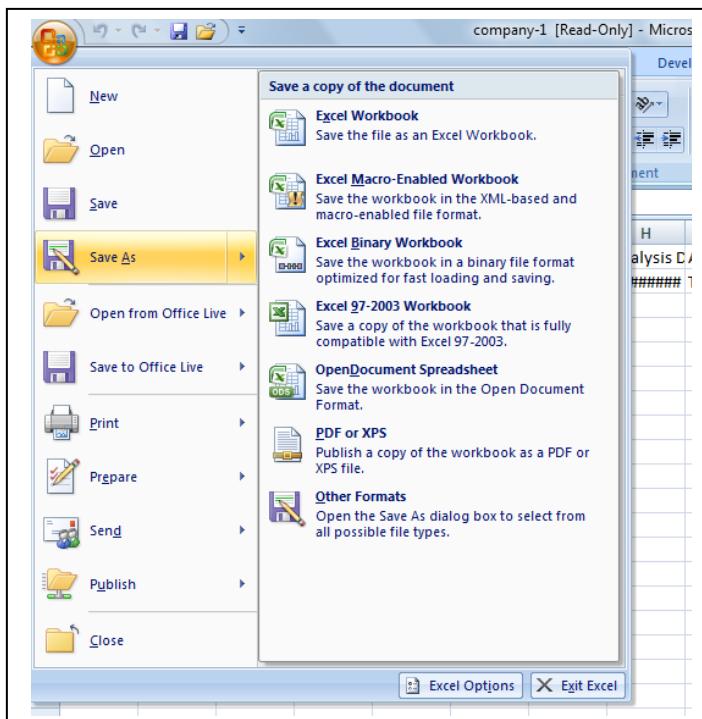


A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Name	Type	Sic	Turnover	Employee	Credit Rat	Credit Lim	Analysis	Address1	Address2	Address3	Postcode	Telephone		
2	Test	Customer						#####	Test	City		BC1 2AC	0123 123 123		
3															
4															
5															
6															

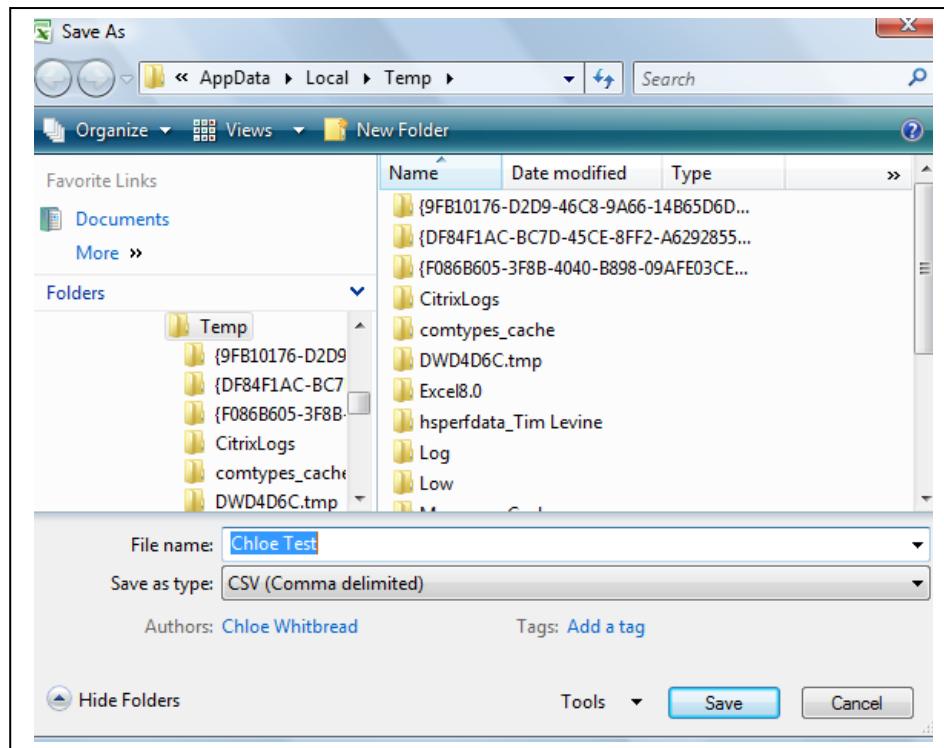
9. Add the import data for the specified import, following the template headings and test data.

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

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



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



13. Go back to the 'Import a File' screen as indicated previously, ready to import you previously saved CSV File.

14. Fill in the following details;

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

Import File

15. 14. Click

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

Processing Import															
Row	Identifier	Customer	Provider	Financial Product	Payment Type	Interest Rate	Rate Per 1000	Initial Payment	Regular Payment Profile	Payment Frequency	Initial Payment	Regular Payment	First Payment Date	Status	Prospect
1	Chloe 18 March	chloe.ashworth@lease-desk.com	rosie.phipps@lease-desk.com	Fixed Term Rental Agreement	Advance	10	null	1	59	Monthly	null	null	15/03/2007	Live	None
2	18-Mar	sarah.barnes@lease-desk.com	chloe.maxwell@lease-desk.com	Hire Purchase Agreement	Advance	11	null	3	57	Monthly	null	null	23/01/2008	Live	None
Save Imported Rows?				Yes ▾											
<input type="button" value="Import Data"/>															

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, however over the red box to receive the explanation, as per below;

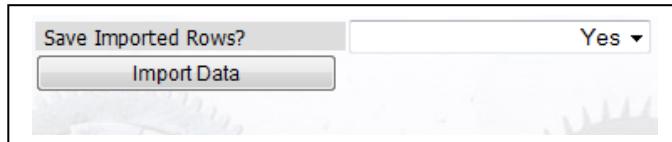
Processing Import															
Logged in as: Chloe Whitbread															
Row	Name	Type	Sic	Registration Number	Turnover	Employees	Credit Rating	Credit Limit	Analysis Date	Address Name	Address1	Address2	Address3	Postcode	Telephone
1	DD Financial Holdings Ltd	Customer	7415	12345	150000	57	70	03101954	01/01/2009	1 Garibaldi Street	null	London	null	EC1 OFF 000	0207 1000
Save Import company already exists				Yes ▾											
<input type="button" value="Import Data"/>															

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' (PP need to make a button)

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

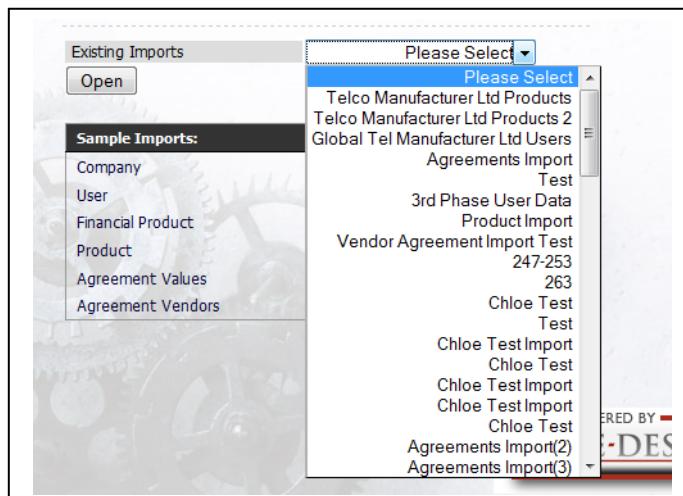


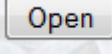
Import Data

1. To complete import, click **Import Data**
2. You will then be taken back to the main imports screen
3. Continue the above process for every type of import required

9.2. Using an Existing Import:

1. Go to **Imports** 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 

5. You will then be presented with the existing import data, as illustrated below;

Company	Name	Part Number	Manufacture
Telco Manufacturer Ltd	5212/24/5312/24 Rmvbl DESI Card 5000 25	51012281	Mitel
Telco Manufacturer Ltd	Agent Portal 25 Agent Pack	54002649	Mitel
Telco Manufacturer Ltd	Agent Portal 50 Agent Pack	54002660	Mitel
Telco Manufacturer Ltd	Ent Manager SWA Enrollment.	54003727	Mitel
Telco Manufacturer Ltd	Gang charger, i640	51008198	Mitel
Telco Manufacturer Ltd	MAS Mobility for 3300 SWA; 2 YR	54004172	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA; 1 YR	54004167	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA; 2 YR	54004168	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA; 4 YR	54004169	Mitel
Telco Manufacturer Ltd	Mobile Client licence Up 10 Users	54004103	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, i640, Europe	51008216	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, i640, NA	51008215	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, UK, Sing, HK	51008217	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr Mexico	51008226	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr UK, Sing, HK	51008223	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr, Europe	51008222	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr, NA	51008221	Mitel
Telco Manufacturer Ltd	Set power supply, OAI Europe	51008210	Mitel
Telco Manufacturer Ltd	Set power supply, OAI, Mexico	51008214	Mitel
Telco Manufacturer Ltd	Set power supply, OAI, NA	51008209	Mitel

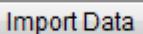
< Previous | Next >

Overwrite Company

Save Imported Rows?

6. Complete the following details;

- Overwrite Company: Yes (if you want the same imported information to be imported against another Company, or No if not).
- Save Imported Rows: As previously shown, Yes to save the new import, No to remove once actioned.

7. Click  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 below in two parts;

Search Agreements

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

Customer		Product	
Name		Name	
Customer Status	All ▾		All ▾
Agreement Status	All ▾		All ▾
Prospect Status	All ▾		All ▾
Customer		Agreement	
		Months Left	All ▾
		RBO Level	All ▾
Primary Contact		Customer Detail	
		SIC Code	All ▾

Vendor		Post Code	
Group		Output Type	
		Turnover	All ▾
		Credit Limit	All ▾
		Credit Rating	All ▾
		Employees	All ▾
Provider		Report	
		Report	Sample 1 ▾
		View Report	Export to CSV
		Reset Form	
Financial Product Name			

3. The Search Agreements screen, allows user to search for all agreement information by using the different filters.

10.1. Searching for a 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.

The screenshot shows a search interface titled 'Customer'. It includes four filter fields: 'Name' (containing 'All'), 'Customer Status' (set to 'All'), 'Agreement Status' (set to 'All'), and 'Prospect Status' (set to 'All'). Below these is a 'Search' button.

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

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

3. Click **Search**

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

The screenshot displays the search results after clicking 'Search'. It contains two filter tables: 'Customer' and 'Primary Contact'. The 'Customer' table lists companies like BDE Logistics Ltd, Beta Healthcare Ltd, Budget Hotel Ltd, and Barkers Financials Ltd, with 'Add' and 'Remove' buttons. The 'Primary Contact' table lists individuals like Pete Johnson, Hannah Martin, Sarah Barnes, and Charlotte Smith, also with 'Add' and 'Remove' buttons. Both tables have a dropdown menu labeled 'All'.

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;

Primary Contact

Hannah Martin	Pete Johnson
Sarah Barnes	
Charlotte Smith	

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.

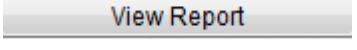
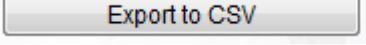
Output Type

Report	Default ▾
View Report	Management Report
Reset Form	Sales Report

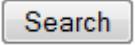
Marketing Report (Full Details)
Marketing Report (Email)
Marketing Report (Postal)
Marketing Report (Contact Details)
Prospect Report

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

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

10. Once the report type has been selected, click on  or  to view in CSV format.

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 
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.

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;

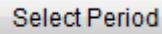
The screenshot shows the LEASE-DESK.COM dashboard with the following details:

- Top Navigation:** Home, Users, Agreements, Companies, Financial Products, Imports, Search, Dashboard, Feedback, Alerts (749), Logout. Logged in as: Chloe Whitbread.
- Sub-navigation:** Prospects, Customers.
- Buttons:** back, Prospects.
- Text Box:** Select the required date range from the drop down menu, to produce graphical information on prospects which can be broken down by status from changing the options in the drop down menus. Information is also broken down in table form on Prospects by Company, Group and User.
- Form:** From: Mar ▾ 2010 ▾ To: Apr ▾ 2010 ▾ Select Period.
- Table:** Prospects by Company (View Agreements)

ID	Company	Prospects
176	Fourth Telco Channel Ltd	15
182	Bright Tel Ltd	11
180	Voice Tel Comms Ltd	9
181	Pulse Networks Ltd	9
179	Data Net Ltd	9
- Figure:** Prospects - Customer Company (Pie chart showing distribution of prospects by company).
- Table:** Prospects by Group (View Agreements)

ID	Group	Prospects
53	Telco Man Enterprise Channel 1	40

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.

	Value
Channel Ltd	£2979237.1
	£927300.9
	£919843.2
	£9000100.7

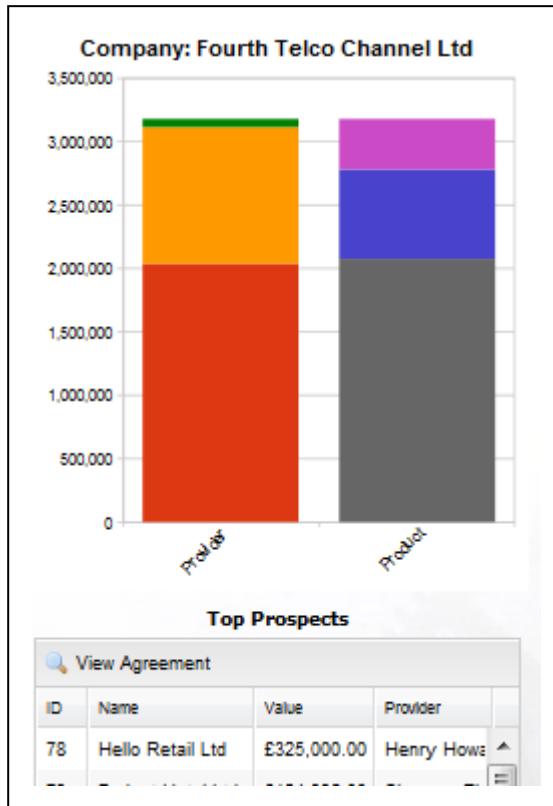
2. Select either User, Group or Company from the second drop down menu box.

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

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 View the Agreement information, highlight the line in the table below the graph and click **View Agreement**

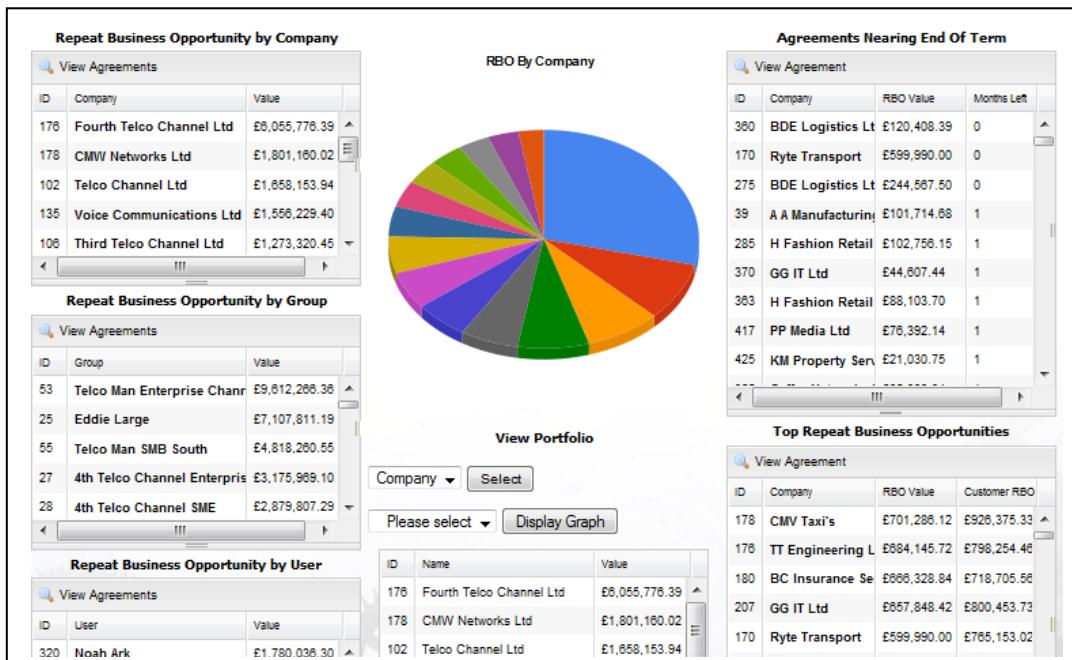
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

11.2. Customers:

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

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

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



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

above, highlight the relevant line within the table and click



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

Logged in as: Chloe Whitbread

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

back

Repeat Business Opportunity by Group

Below are the results from your search

Add Agreement		Edit Agreement	Delete Agreement	View Agreement	Edit Calculation	View Log
ID	Identifier	Company	Status	Primary User	RBO Level	End Date
48	123-0099	Burnley College	Live	Terry Test	257779.84	01/03/2012

5. You then have the option to Add a completely new Agreement, Edit the Agreement, Delete the Agreement, View Agreement, and View 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;

ID	Name	Value
105	Second Telco Channel Ltd	£69267
106	Third Telco Channel Ltd	£77707
104	Telco Distributor Ltd	£171245
102	Telco Channel Ltd	£103390
135	Voice Communications Ltd	£52519

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

ID	Name	Value
136	Data Communications Ltd	£6006052.8

3. Click

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

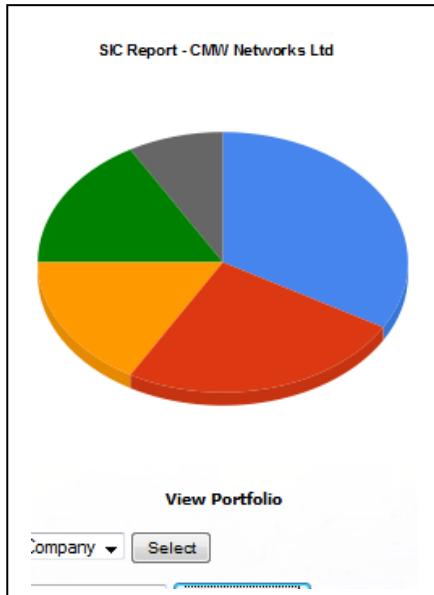
5. Next select the Agreement grouping from the drop down menu, as indicated below;

Please select		Display Graph
Provider		
Customer		
Product		
Term		
Status		
SIC code		
Months to Run		
102	Telco Channel Ltd	£723205
138	Comms VAR Ltd	£746200
136	Data Communications Ltd	£516982

6. Highlight the required row from the table and click

VIEW PORTFOLIO		
Company		Select
Please select		Display Graph
ID	Name	Value
136	Data Communications Ltd	£606952.65
135	Voice Communications Ltd	£489957.25
102	Telco Channel Ltd	£472475.66
138	Comms VAR Ltd	£178161.49
105	Second Telco Channel Ltd	£145029.85

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 see all of the system generated alerts unless a user clicks 'Completed' as an action which will remove the alert from the list.

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

The Alert Triggers are as follows;

- When a new Agreement is added to the system as a live, or Prospect contract.
- When a Prospect changes to a live customer (The vendor will be emailed to send insurance details).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through the term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.
- When an Agreement reaches one month before the end of term, in order to notify customer of notice in writing to the Financial Provider.
- Monthly Live Agreement RBO values.

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

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 until completion.**
- 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 **Alerts (29)** from the top menu.

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

ID	Recipient	Subject	Message	Time
87	Bea Elzebub	New Live Agreement	New live agreement Customer Name: Alpha Media Ltd Agreement ID: 173 Agreement Value: 559944.00 Provider: Henry Howard Finance PLC Regular Payment: 11854.01 Payment Profile: 3+57 Insurance Action: Title To Vendor Link: http://demo.lease-desk.com/agreement/view/173/	09/02/2010 07:56:39
86	Russell Brand	New Live Agreement	New live agreement Customer Name: Lobbo Manufacturing Ltd (Slough)	09/02/2010 07:52:21

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

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

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

13. General Functionality:

13.1. Sort:

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

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

Before Sort

Company
Zeeta Insurance Ltd
XYZ Sandwiches Ltd
XYZ Foods Ltd
XYZ Cakes Ltd
Walkaway Hair Ltd
Walesbury Paint Ltd

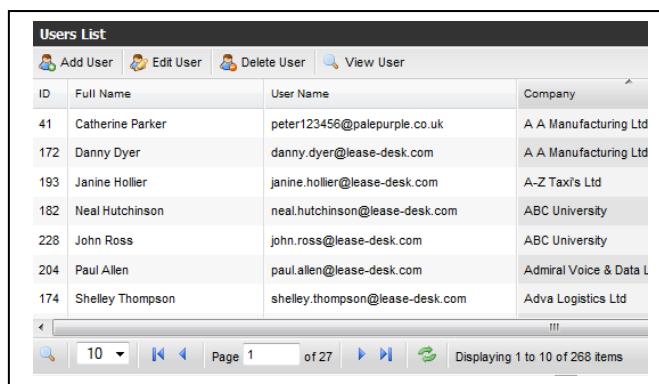
After Sort

Company
A A Manufacturing Ltd
A A Manufacturing Ltd
A-Z Taxi's Ltd
ABC University
ABC University
Admiral Voice & Data Ltd
Adva I onistics Ltd

13.2 Quick Search:

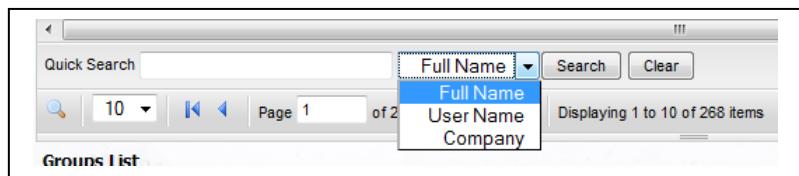
Within Lease-Desk is a 'Quick Search' functionality within the majority of main tables, for example, Companies, Users, Groups etc, allowing easy access to the required information.

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

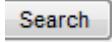


ID	Full Name	User Name	Company
41	Catherine Parker	peter123456@palepurple.co.uk	A A Manufacturing Ltd
172	Danny Dyer	danny.dyer@lease-desk.com	A A Manufacturing Ltd
193	Janine Hollier	janine.hollier@lease-desk.com	A-Z Tax's Ltd
182	Neal Hutchinson	neal.hutchinson@lease-desk.com	ABC University
228	John Ross	john.ross@lease-desk.com	ABC University
204	Paul Allen	paul.allen@lease-desk.com	Admiral Voice & Data L
174	Shelley Thompson	shelley.thompson@lease-desk.com	Adva Logistics Ltd

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



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

4. Click  to search for the information

5. Click  to start from the beginning.

13.3 Refresh:

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

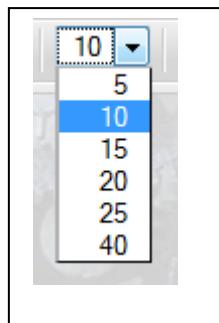
13.4 Scrolling through records:

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

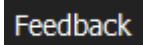
-  Forward to next page of records
-  Forward to end of records
-  Go back to previous page of records
-  Go to the start of the records

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 of records viewed on a page at a time, as per below.



14. Feedback:

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

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

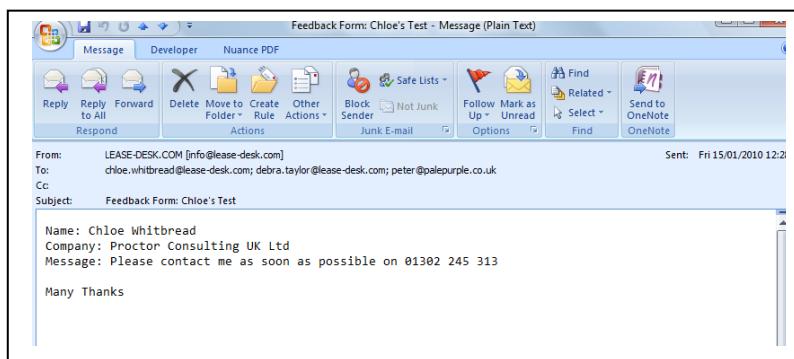
6. The user will need to add a Subject Title and complete the message detail box.

7. Once completed, click

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