

# LEASE-DESK

## Main Access User Manual Version 2.0



## Table of Contents

1. Introduction to Lease-Desk:.....	4
2. Logging into Lease-Desk:.....	5
3. Home Screen: Adding, Editing, Viewing & Deleting.....	6
3.1. Adding, Editing, Setting as Main, and Deleting Addresses: .....	7
3.1.1. Adding an Address: .....	7
3.1.2. Editing an Address: .....	8
3.1.3. Setting an Address as Main:.....	9
3.1.4. Deleting an Address: .....	10
3.2. Adding, Viewing, and Deleting Files:.....	11
3.2.1. Adding a File:.....	11
3.2.2. Viewing a File: .....	12
3.2.3. Deleting a File: .....	12
3.3. Providers: Associating and Deleting Association: .....	13
3.3.1. Associating a Provider (Vendor Only): .....	13
3.3.1. Deleting a Provider Association (Vendor Only): .....	14
3.4. Adding, Editing and Deleting Products (Vendor Only):.....	15
3.4.1 Adding a Product:.....	15
3.4.2 Editing a Product:.....	16
3.4.3 Deleting a Product: .....	17
4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log .....	17
4.1. Viewing a Live or Prospect Agreement: .....	17
4.1.1 Calling or Emailing a Primary Contact:.....	20
2. If you have selected the 'Call User' option, you will then be presented with the screen below .....	20
5. If you have selected the 'Email User' option, you will then be presented with the.....	21
6. Select either 'Blank' or 'Agreement Details' from the 'Populate' dropdown list. ....	21
7. Enter the message and either click on 'Save', to save the message or 'Open in.....	21
4.1.3 Adding, Viewing and Deleting a File: .....	24
4.1.4 Viewing a Note:.....	24
4.1.5 Adding a Note: .....	25
4.2. Viewing an Audit Log: .....	27

5.0 Search:	28
5.1. Searching for Specific Customer Agreement Information:	30
5.2. Searching for all Customer Agreement Information:	33
6. Dashboard:	33
6.1. Prospects:	34
6.1.1 Viewing Top Prospect Information in Graphical Format:	35
6.2. Customers:	37
6.2.1 Viewing/Amending Portfolio Information:	38
7. Alerts:	40
8. General Functionality:	42
8.1. Sort:	42
8.2 Quick Search:	43
8.3 Refresh:	44
8.4 Scrolling through records:	44
8.5 Changing the amount of records per view:	44
9. Feedback:	45
10. Frequently Asked Questions:	46
11. Contact Details:	47

## 1. Introduction to Lease-Desk:

Lease-Desk is a Portfolio Management System designed specifically by Proctor Consulting, 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 Proctor Consulting's Lease-Desk Administration team, main access users are able to view and/or edit their individual or teams current pending or live customer agreements, and view an overall snapshot of all current agreements via the dashboard. All available repeat business opportunities are indicated via the dashboard functionality so that 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.

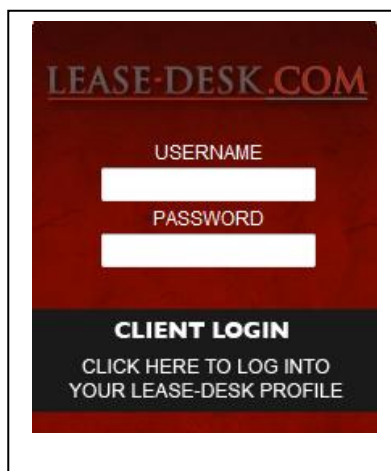
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will generally have 'reader' access rights to the groups that you have been set up in by the administrators. This means that you can view all of the live and pending agreement information for all writers within the groups you are in.

The terminology for all role types is defined below;

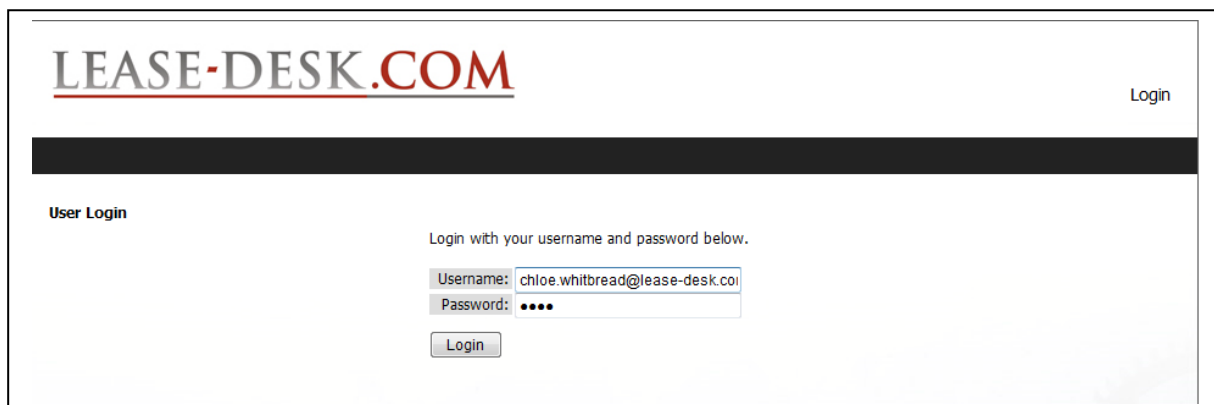
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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

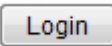
## 2. Logging into Lease-Desk:

1. Go to [www.Lease-Desk.com](http://www.Lease-Desk.com) and click on the Client Login box as per below.



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



3. Enter your details and click on 

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

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

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

The screenshot displays the LEASE-DESK.COM home screen. At the top, the logo is on the left, and the user is logged in as 'Steve Barnard' on the right, with links for 'Feedback' and 'Logout'. A navigation bar includes 'Home', 'Agreements', 'Search', and 'Dashboard', along with an 'Alerts (73)' indicator. A 'back' button is visible below the navigation bar.

The main content area is titled 'Company Details' and includes a welcome message: 'Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc.'

**Company Information**

Name:  Save Changes

Company Type:  Vendor  
 SIC Code:   
 Registration Number:   
 Turnover:   
 Employees:   
 Credit Rating:   
 Credit Limit:   
 Analysis Date:

**Addresses**

Buttons: Add Address, Edit Address, Set As Main, Delete Address

ID	Name	Address	Post Code	Telephone
184	Main Office	Unit 42 Sketherton B	NN11 2EW	01604 596569

**Files**

Buttons: Add File, View File, Delete File

ID	Name	Type
5	Demo Company Import.csv	Other

**Providers**

Buttons: Associate Provider, Delete Association

ID	Company ID	Name
33	100	Siemens Financial Services Ltd
34	101	Henry Howard Finance PLC

**Groups**

ID	Name
34	Bright Tel Enterprise
36	Bright Tel SME North
51	Corrine Taylor

**Users**

ID	User Name	Full Name	Job Title	Type
371	steve.barnard@lease-desk.com	Steve Barnard	Sales Director	Main
377	jeremy.carse@lease-desk.com	Jeremy Carse	Account Manager SME South	Normal
375	mike.chaplin@lease-desk.com	Mike Chaplin	Account Manager Enterprise Team	Normal

**Products**


Buttons: Add Product, Edit Product, Delete Product





ID	Part Number	Name	Manufacturer
2368	S0000111	Imaginary Part 2	Telco Manufacturer Ltd

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

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

#### 3.1.1. Adding an Address:

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

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

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

LEASE-DESK.COM

Logged in as: Steve Barnard

Feedback Logout

Home Agreements Search Dashboard Alerts (73)

back

Add Address To Company

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

Address Line 1


Address Line 2

Address Line 3

Postcode


Telephone

Save Details





Save Details

3. Fill in the full address details and click on

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





Created a New Address

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

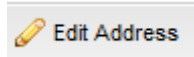
Addresses				
 Add Address  Edit Address  Set As Main  Delete Address				
ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

### 3.1.2. Editing an Address:

1. 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, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

2. Click on

Edit Address



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

LEASE-DESK.COM

Logged in as: Steve Barnard

Feedback Logout

Home Agreements Search Dashboard Alerts (73)

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	Main Office
Address Line 1	Unit 42 Sketherton Business Par
Address Line 2	Northampton
Address Line 3	Northamptonshire
Postcode	NN11 2EW
Telephone	01604 596569

Save Changes

Save Changes

4. Amend the required Address details and click on

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

Updated Address

### 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;

Updated Address

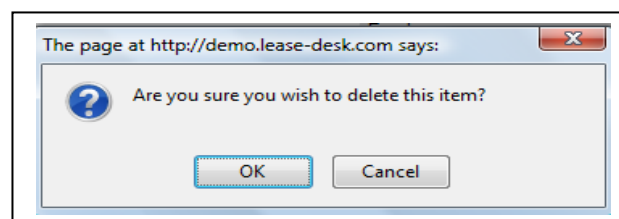
3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;

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

#### 3.1.4. Deleting an Address:

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

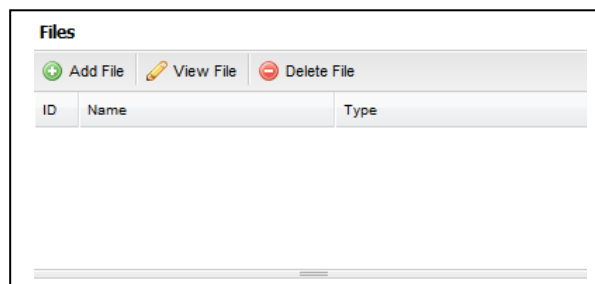
 Deleted Address

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

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

### 3.2.1. Adding a File:

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

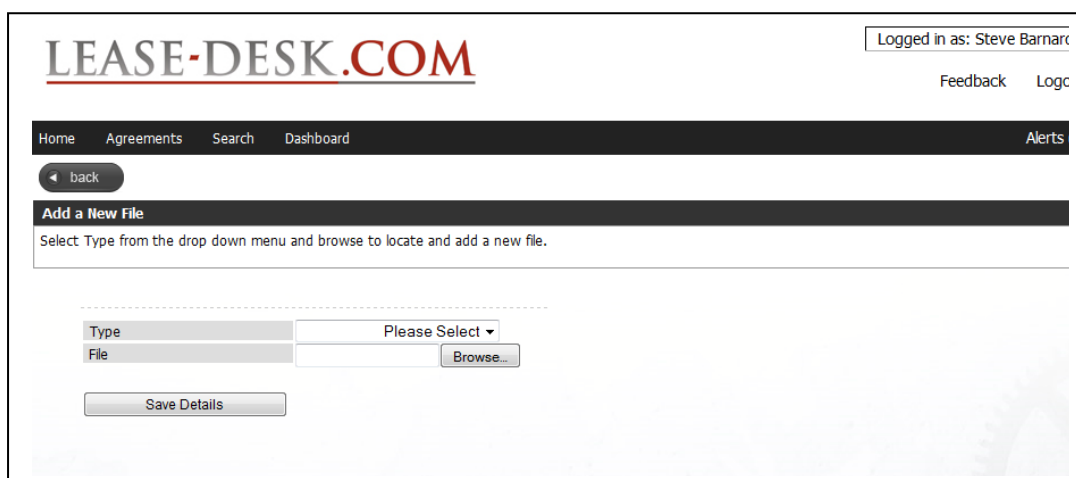


The screenshot shows a web interface titled 'Files'. At the top, there are three buttons: 'Add File' (with a green plus icon), 'View File' (with a yellow pencil icon), and 'Delete File' (with a red minus icon). Below these buttons is a table with three columns: 'ID', 'Name', and 'Type'. The table is currently empty.

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



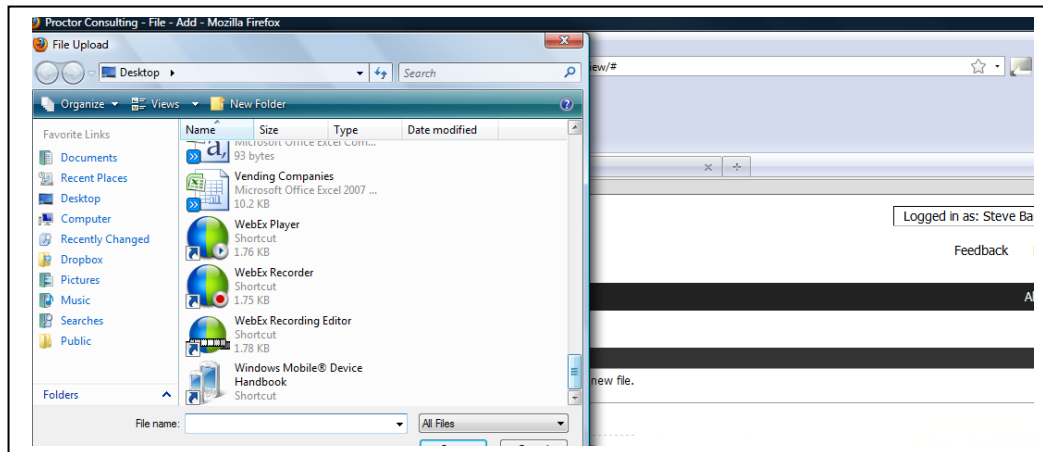
3. You will then be presented with the 'Add a New File' screen as indicated below;



The screenshot shows the 'Add a New File' screen. At the top, there is a navigation bar with links: Home, Agreements, Search, Dashboard, and Alerts. Below the navigation bar, there is a 'back' button. The main heading is 'Add a New File'. Below the heading, there is a text prompt: 'Select Type from the drop down menu and browse to locate and add a new file.' Below this prompt, there is a form with a 'Type' dropdown menu (currently showing 'Please Select'), a 'File' input field, and a 'Browse...' button. At the bottom of the form, there is a 'Save Details' button.

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

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



Save Details

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

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



### 3.2.2. Viewing a File:

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

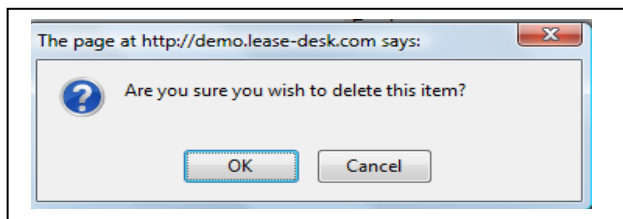
2. Click 

### 3.2.3. Deleting a File:

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

2. Click 

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



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

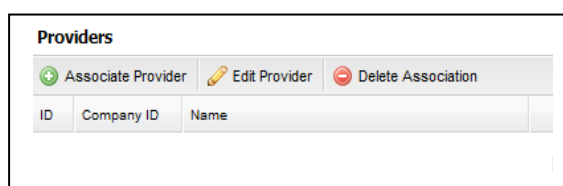
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;



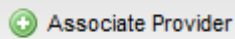
### 3.3. Providers: Associating and Deleting Association:

#### 3.3.1. Associating a Provider (Vendor Only):

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



2. Click



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

The screenshot shows the 'Add a Provider' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Steve Barnard' with 'Feedback' and 'Logout' links is on the right. Below the logo is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. On the right of this bar is 'Alerts (73)'. A 'back' button is on the left. The main heading is 'Add Provider'. Below it is a text box: 'To associate a provider with your company details, select the required provider from the drop down menu and click on Add Provider'. There is a 'Provider' dropdown menu with 'Chloe's Test Company' selected. Below the dropdown is a 'Save Details' button.

Save Details

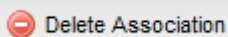
4. Select a Provider from the drop down menu and click

5. You will then be taken back to your homepage.

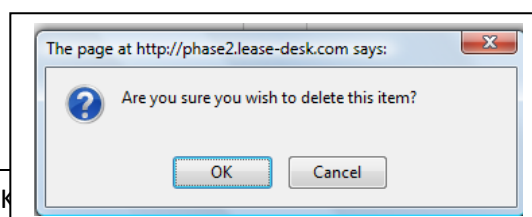
### 3.3.1. Deleting a Provider Association (Vendor Only):

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



3. You will then be presented with the Confirmation Message as per below. Select OK to delete or Cancel to cancel action.



4. You will then be taken back to your home screen.

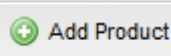
### 3.4. Adding, Editing and Deleting Products (Vendor Only):

#### 3.4.1 Adding a Product:

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

Id	Part Number	Name	Manufacturer
2386	50000111	Imaginary Part 2	Telco Manufacturer Ltd
2387	51009841	Gigabit Ethernet Stand	Telco Manufacturer Ltd
6913	50000110	PKM 12 BUTTON KIT,DARK GREY-UNIVERSAL	Telco Manufacturer Ltd
6914	50000320	EXPRESS MESSENGER PMS CABLE [Pre GA]	Telco Manufacturer Ltd

2. Click



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

LEASE-DESK.COM

Logged in as: Steve Barnard

Feedback Logout

Home Agreements Search Dashboard Alerts (73)

back

**Add A New Product**

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

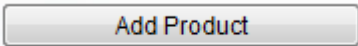
Product Name

Part Number

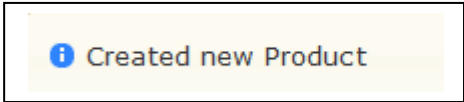
Manufacturer

Save Details

4. Fill in the details and click

A rectangular button with a light gray gradient and rounded corners, containing the text "Add Product" in a dark gray font.

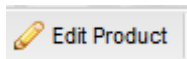
5. You will then be taken back to the main Company Details screen and receive the following confirmation;

A yellow rectangular box with a thin black border. On the left is a blue circular icon with a white lowercase 'i'. To its right is the text "Created new Product" in a dark blue font.

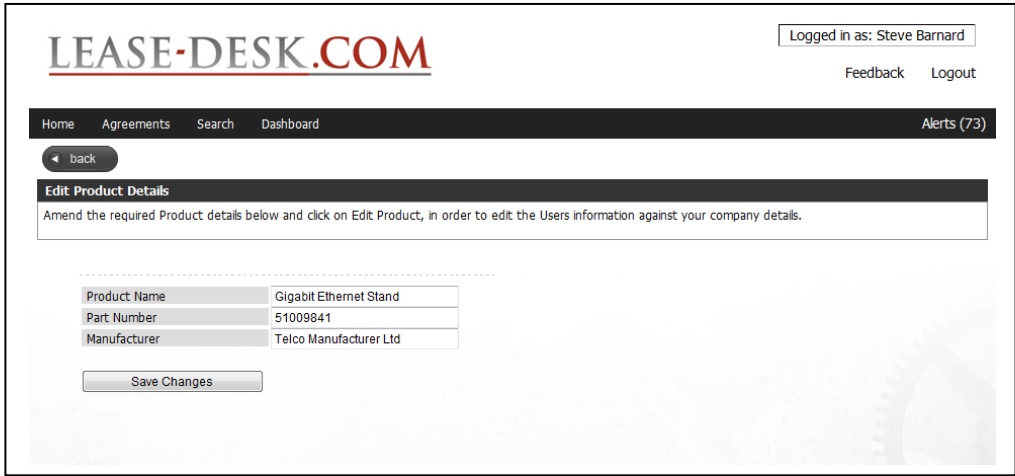
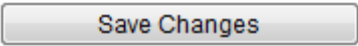
### 3.4.2 Editing a Product:

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

A rectangular button with a light gray gradient and rounded corners. It features a small yellow pencil icon to the left of the text "Edit Product" in a dark gray font.

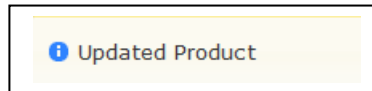
3. You will then be presented with the 'Edit Product Details' screen as per below;

A screenshot of the LEASE-DESK.COM web application. The header shows the logo, a login status "Logged in as: Steve Barnard", and links for "Feedback" and "Logout". A navigation bar contains "Home", "Agreements", "Search", and "Dashboard", with "Alerts (73)" on the right. Below the navigation bar is a "back" button. The main section is titled "Edit Product Details" and contains a text box with instructions: "Amend the required Product details below and click on Edit Product, in order to edit the Users information against your company details." Below this is a form with three fields: "Product Name" (Gigabit Ethernet Stand), "Part Number" (51009841), and "Manufacturer" (Telco Manufacturer Ltd). A "Save Changes" button is at the bottom of the form.A rectangular button with a light gray gradient and rounded corners, containing the text "Save Changes" in a dark gray font.

4. Amend the required detail and then click

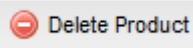


5. You will then be taken back to the Company Details screen and will receive the following confirmation message;



### 3.4.3 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 

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;

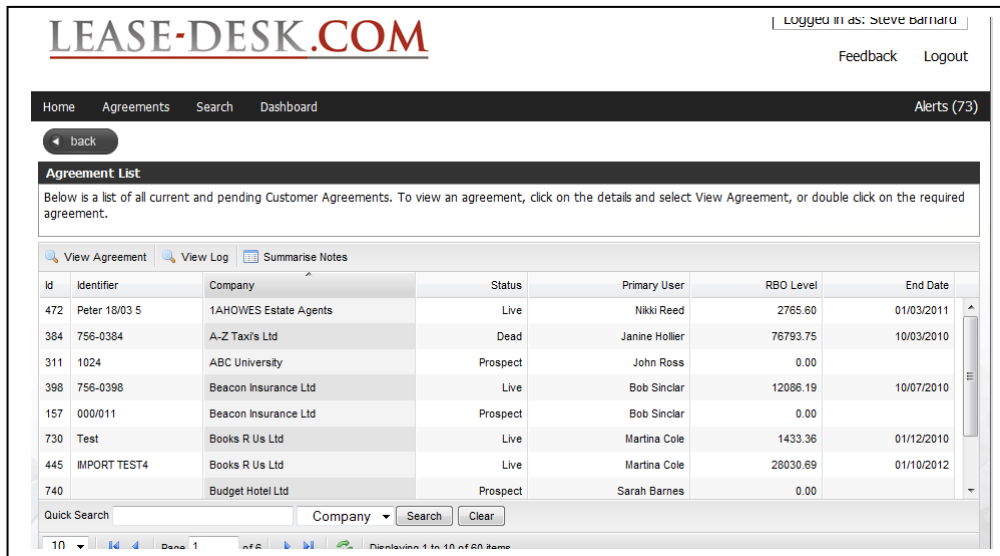


## 4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log

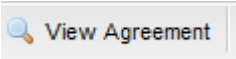
### 4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select 

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



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

4. Click  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 indicates the Financial Product information

### Upgrade Options:

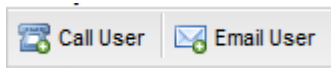
The RBO level indicated (Repeat Business Opportunity), indicates how much a customer has to spend on technology refresh. **Note this is only available on Live deals**

### Product Information:

This indicates the Product (s) within the agreement.

#### 4.1.1 Calling or Emailing a Primary Contact:

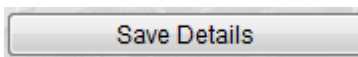
1. Within the Companies table, highlight the required user and then click on the required Option;



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

A screenshot of a web application interface. At the top is a navigation bar with links: Home, Agreements, Search, Dashboard, and Alerts (17). Below the navigation bar is a 'back' button. The main heading is 'Add Call Note'. Below the heading is a text box with the instruction: 'Add a note by adding details to the message box and clicking on Save.' Below this is a form with four fields: 'Company Name' (BDE Logistics Ltd), 'User Name' (Pete Johnson), 'Telephone Number' (0116 2923000), and 'Message' (a large empty text area). At the bottom left of the form is a 'Save' button.

3. Complete the details and click



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

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

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

Company Name	Bell Finance PLC
User Name	Rosie Phipps
Email	rosie.phipps@lease-desk.com
Populate	Blank ▼
Message	

Open In Email Client Save

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

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

#### 4.1.2 Creating Follow Ups:

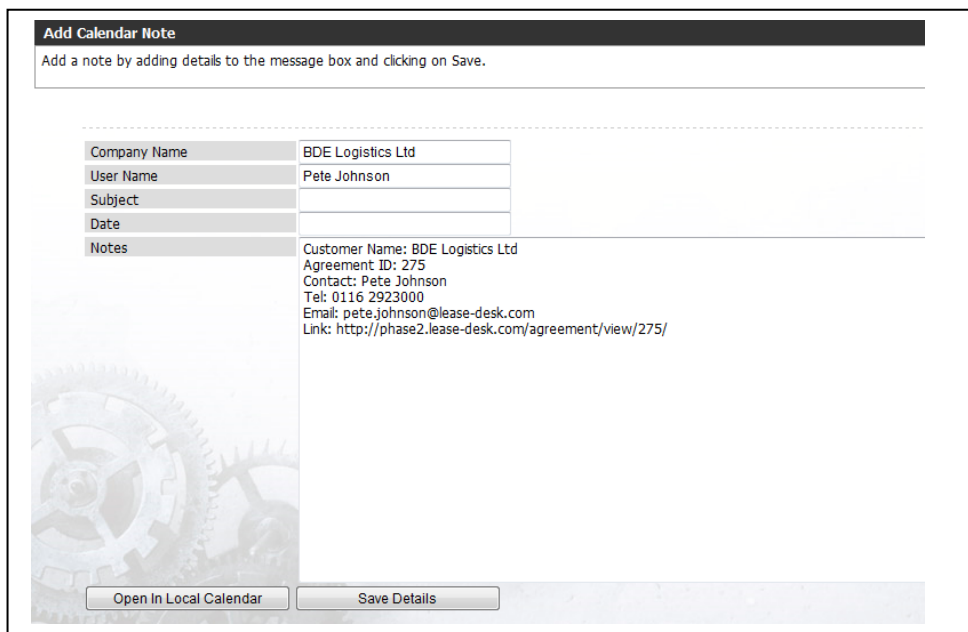
1. Highlight the contact required from the Companies table as indicated below;

Call User   Email User   Follow Up			
ID	Name	Primary Contact	Type
98	BDE Logistics Ltd	Pete Johnson	Customer
133	Bell Finance PLC	Rosie Phipps	Provider
176	Fourth Telco Channel Ltd	Noah Ark	Vendor

2. Click on



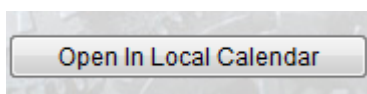
3. You will then be presented with the following screen;

A screenshot of a web form titled 'Add Calendar Note'. The form has a header bar with the title and a sub-instruction: 'Add a note by adding details to the message box and clicking on Save.' Below this is a large text area for notes. To the left of the notes area is a table with fields for 'Company Name', 'User Name', 'Subject', 'Date', and 'Notes'. The 'Company Name' field is filled with 'BDE Logistics Ltd', 'User Name' with 'Pete Johnson', and 'Subject' is empty. The 'Date' field is empty. The 'Notes' field contains a block of text: 'Customer Name: BDE Logistics Ltd', 'Agreement ID: 275', 'Contact: Pete Johnson', 'Tel: 0116 2923000', 'Email: pete.johnson@lease-desk.com', and 'Link: http://phase2.lease-desk.com/agreement/view/275/'. At the bottom of the form are two buttons: 'Open In Local Calendar' and 'Save Details'.

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

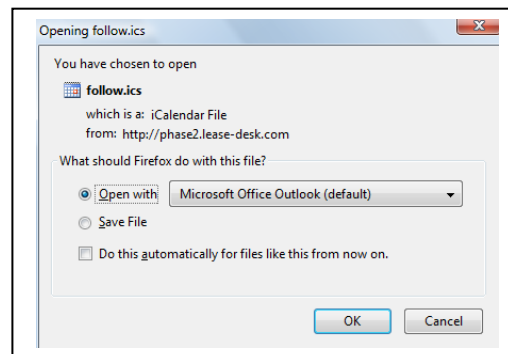
5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

6. Click

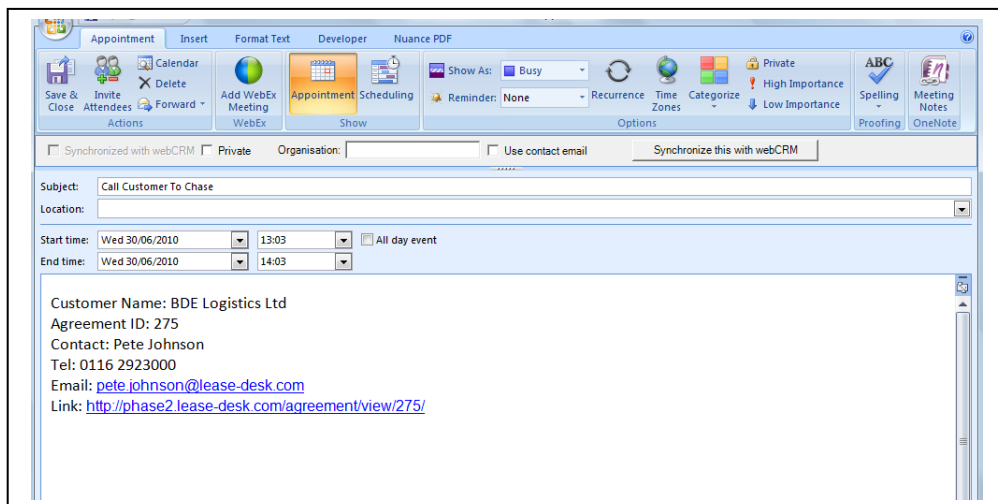


to open up your email.

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



8. Click on 'OK' to open up your email. You will then receive the following screen;



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

#### 4.1.3 Adding, Viewing and Deleting a File:

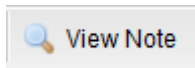
1. To Add, View or Delete a File, follow chapter **3.2. Adding, Viewing and Deleting Files**

#### 4.1.4 Viewing a Note:

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

Notes					
<a href="#">+ Add Note</a> <a href="#">✎ Edit Note</a> <a href="#">- Delete Note</a> <a href="#">🔍 View Note</a> <a href="#">📄 Summarise</a>					
ID	Type	Name	Note	Date	
110	Internal	Steve Barnard	Chloe testing notes	22/03/2010 11:14:51	
109	External	Steve Barnard	sdsdsdsdsdsd	22/03/2010 11:12:49	

2. Click



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

LEASE-DESK.COM

Feedback Logout

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

Alerts (17)

[← back](#)

View Note

Full note details are detailed below.

Username

Noah Ark

Type

Internal

Message

Chloe test.....



#### 4.1.5 Adding a Note:

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

2. Click 

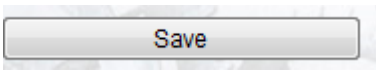
3. You will then be presented with the following 'Add Note' screen;



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

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

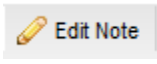
4. Type your message into the blank box

5. Click 

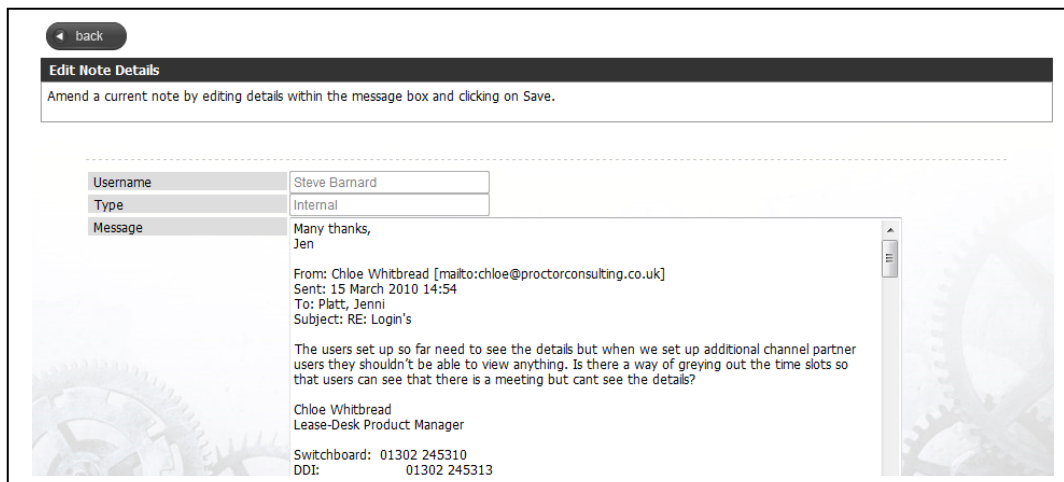
5. You will then be taken back to the main 'View Agreement' screen.

#### 4.1.6 Editing a Note

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

2. Highlight the required note and click 

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



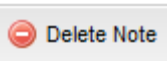
Save Changes

4. Amend the note as required and then click

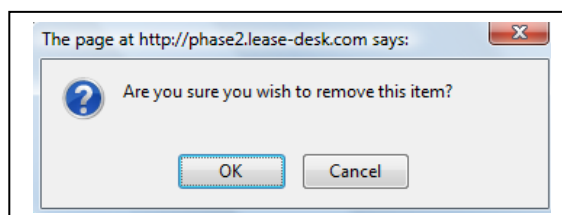
#### 4.1.7 Deleting a Note:

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

2. Highlight the required note and click on



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

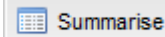


4. Select 'OK' to delete or 'Cancel' to cancel the request.

#### 4.1.8 Summarising Notes:

1. Either within the particular agreement required, or via the main agreement list and by

highlighting the particular agreement required, click



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



The screenshot shows the 'View Summarised Notes' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Steve Barnard' is on the right. Below the logo is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. On the right of the navigation bar is 'Alerts (46)'. Below the navigation bar is a 'back' button and a 'Printable version' link. The main content area is titled 'View Summarised Notes' and contains a table with the following data:

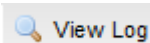
ID	Type	Name	Recipient	Note	Date
110	Internal	Steve Barnard		Chloe testing notes	22/03/2010 11:14:51
109	External	Steve Barnard		sdsdsdsdsdsd	22/03/2010 11:12:49

#### 4.2. Viewing an Audit Log:

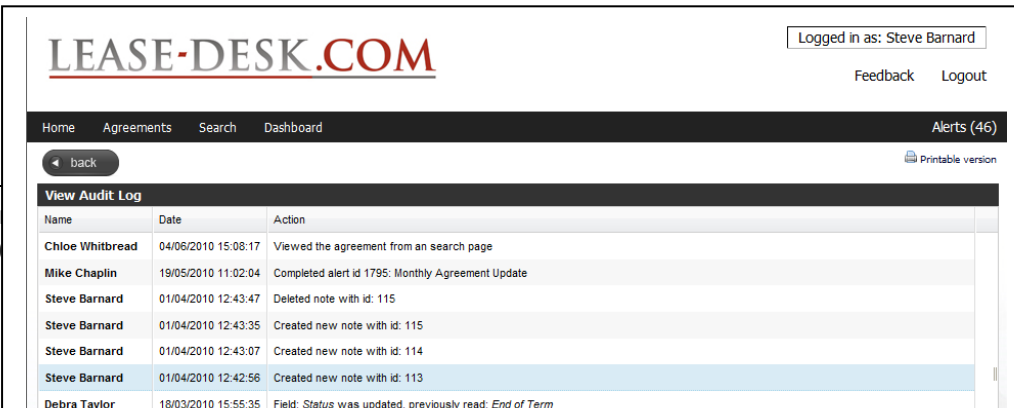
1. There are two ways in which to view the Audit Log against an agreement;

A) Either highlight the required Agreement from the main Agreement Lists screen as

indicated previously and then click



to receive the following screen;

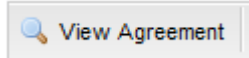


The screenshot shows the 'View Audit Log' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Steve Barnard' is on the right. Below the logo is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. On the right of the navigation bar is 'Alerts (46)'. Below the navigation bar is a 'back' button and a 'Printable version' link. The main content area is titled 'View Audit Log' and contains a table with the following data:

Name	Date	Action
Chloe Whitbread	04/06/2010 15:08:17	Viewed the agreement from an search page
Mike Chaplin	19/05/2010 11:02:04	Completed alert id 1795: Monthly Agreement Update
Steve Barnard	01/04/2010 12:43:47	Deleted note with id: 115
Steve Barnard	01/04/2010 12:43:35	Created new note with id: 115
Steve Barnard	01/04/2010 12:43:07	Created new note with id: 114
Steve Barnard	01/04/2010 12:42:56	Created new note with id: 113
Debra Taylor	18/03/2010 15:55:35	Field: Status was updated, previously read: End of Term

or

or

B) Select the Agreement required from the Agreement list and click  and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

Audit Log		
Name	Date	Action
Noah Ark	28/04/2010 16:12:59	Created new note with id: 158
Noah Ark	28/04/2010 16:08:17	Created new note with id: 157
Noah Ark	28/04/2010 15:58:18	Viewed the agreement from an view page
Debra Taylor	28/04/2010 15:02:28	Viewed the agreement from a 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: <i>First Payment Date</i> was updated, previously read: 2005-04-09

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

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

## 5.0 Search:

- Go to  on the top main menu.

- You will be presented with the 'Search Agreements' screen as indicated on the following page in two parts;

Home Agreements Search Dashboard Alerts (11)

back

### 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**

Name

Agreement Status  All

Prospect Status  All

Search

Date Range  None

From:  Jun  2010 To:  Jun  2010

**Product**

Name

**Customer**

All

**Vendor**

All

**Primary Contact**

All

**Agreement**

Months Left  All

RBO Level  All

**Customer Detail**

SIC Code

**Post Code**

Post

**Turnover**

All

**Credit Limit**

All

**Credit Rating**

All

**Employees**

All

**Output Type**

Report  Default

**Group**

All

**Provider**

All

**Financial Product Name**

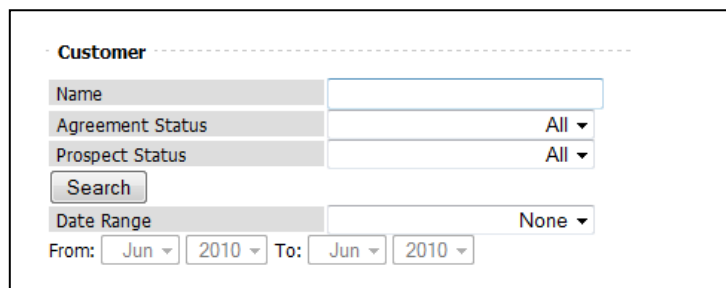
Financial Product Type  All

All

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

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

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



**Customer**

Name

Agreement Status

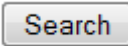
Prospect Status

Date Range

From:   To:

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

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

3. Click 

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



**Customer**

BDE Logistics Ltd Beta Healthcare Ltd Budget Hotel Ltd Barkers Financials Ltd	All
--	-----

**Primary Contact**

Pete Johnson Hannah Martin Sarah Barnes Charlotte Smith	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;

The screenshot shows a window titled "Primary Contact" with a dashed border. Inside, there are two list boxes. The left list box contains the names "Hannah Martin", "Sarah Barnes", and "Charlotte Smith". The right list box contains the name "Pete Johnson", which is highlighted in blue. Below the list boxes are two buttons: "Add" and "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;

The screenshot shows a table with four rows and two columns. The first column contains labels: "Turnover", "Credit Limit", "Credit Rating", and "Employees". The second column contains drop-down menus, all of which are currently set to "All".

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.

The screenshot shows a window titled "Output Type" with a dashed border. Inside, there is a "Report" label, a "View Report" button, and a "Reset Form" button. To the right of these buttons is a drop-down menu currently set to "Default". The drop-down menu is open, showing a list of report types: "Default", "Management Report", "Sales Report", "Marketing Report (Full Details)", "Marketing Report (Email)", "Marketing Report (Postal)", "Marketing Report (Contact Details)", and "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.

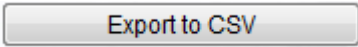
6. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the 'Output Type', and select a report type from the drop down menu.

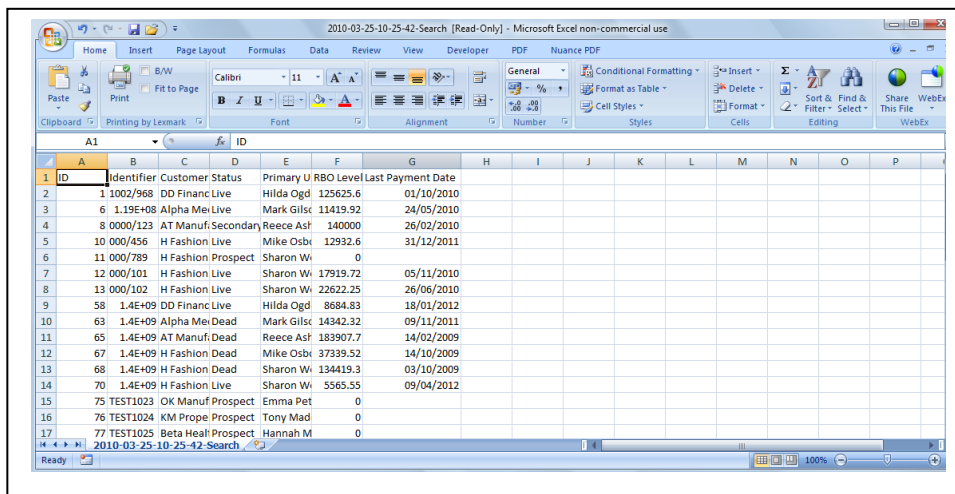
7. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

10. Once the report type has been selected, click on [View Report](#) to receive the following page;

Search Agreements					
Below are the results from your search					
<a href="#">View Agreement</a> <a href="#">View Log</a>					
Id	Customer Name	Prospect Status	Primary Vendor	Vendor User	Capital Amount
63	Alpha Media Ltd	Accepted	Second Telco Channel Ltd	Vanessa Smith	54600.00
429	AT Manufacturing	None	Second Telco Channel Ltd	Winston Armani	6000.00
8	AT Manufacturing	Proposed	Second Telco Channel Ltd	Winston Armani	140000.00
415	AT Manufacturing		Second Telco Channel Ltd	Paul Jones	21000.00
65	AT Manufacturing		Second Telco Channel Ltd	Winston Armani	147000.00
142	B.R.B. Engineering Ltd		Second Telco Channel Ltd	Mike Versace	479904.00
367	BC Insurance Services Ltd		Second Telco Channel Ltd	Winston Armani	21600.00
<div> <div>40</div> <div>Page 1 of 2</div> <div>Displaying 1 to 40 of 45 items</div> </div>					
<div> <div>Report</div> <div>Prospect Report</div> <div>View Report</div> <div>Export to CSV</div> </div>					
Total		Amount			
RBO		2,125,945.88			

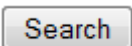


or  to view in CSV format as per the following page;



ID	Identifier	Customer Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ Live	Hilda Ogd	125625.6	01/10/2010
3	6	1.19E+08 Alpha Men Live	Mark Gilles	11419.92	24/05/2010
4	8	0000/123 AT Manuf Secondary	Reece Asl	140000	26/02/2010
5	10	000/456 H Fashion Live	Mike Osbi	12932.6	31/12/2011
6	11	000/789 H Fashion Prospect	Sharon Wi	0	
7	12	000/101 H Fashion Live	Sharon Wi	17919.72	05/11/2010
8	13	000/102 H Fashion Live	Sharon Wi	22622.25	26/06/2010
9	58	1.4E+09 DD Financ Live	Hilda Ogd	8684.83	18/01/2012
10	63	1.4E+09 Alpha Men Dead	Mark Gilles	14342.32	09/11/2011
11	65	1.4E+09 AT Manuf Dead	Reece Asl	183907.7	14/02/2009
12	67	1.4E+09 H Fashion Dead	Mike Osbi	37339.52	14/10/2009
13	68	1.4E+09 H Fashion Dead	Sharon Wi	134419.3	03/10/2009
14	70	1.4E+09 H Fashion Live	Sharon Wi	5565.55	09/04/2012
15	75	TEST1023 OK Manuf Prospect	Emma Pet	0	
16	76	TEST1024 KM Prope Prospect	Tony Mad	0	
17	77	TEST1025 Beta Heal Prospect	Hannah M	0	

## 5.2. Searching for all Customer Agreement Information:

1. From the main 'Search Agreements' screen as indicated previously, leave the Customer name, field blank and Status and Prospect Status set to 'All'
2. Click 
3. As indicated in previous steps, select any of the information using filters or leave as 'All'.
4. Follow the previous step 9 on how to select report type and view data.

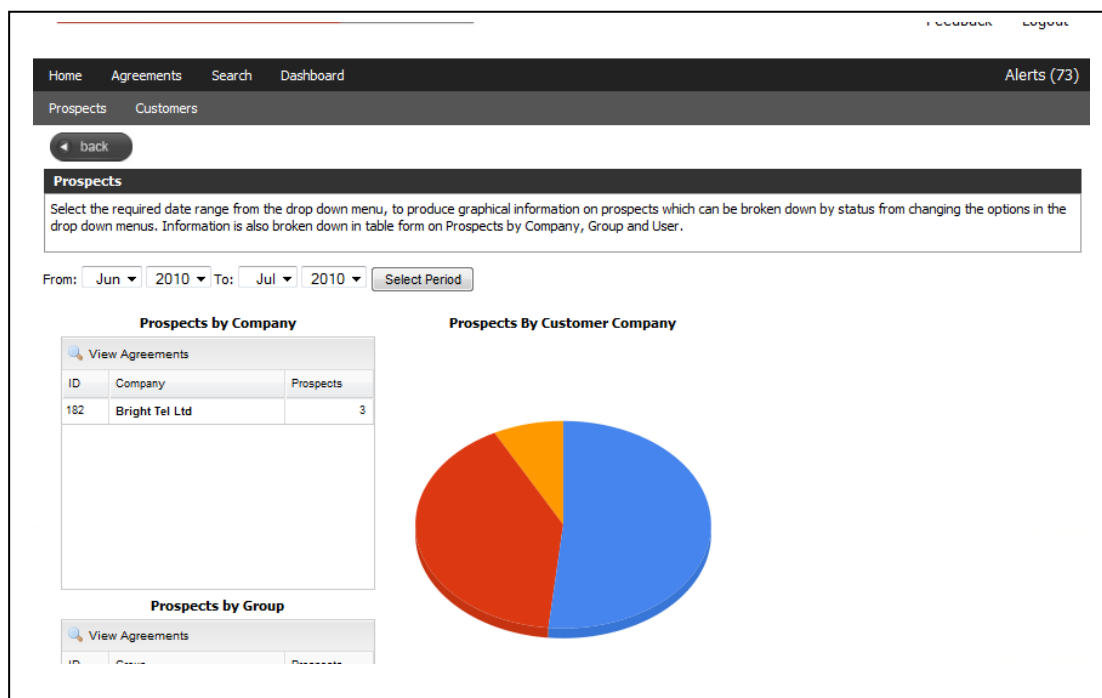
## 6. Dashboard:

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

## 6.1. Prospects:

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

1. Go to **Dashboard** on the main top menu.
2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a graph showing all figures, as indicated below;



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

Select Period

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

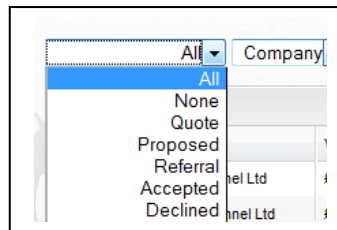
5. To view any of the information in the tables shown, highlight the required line of

information and click 

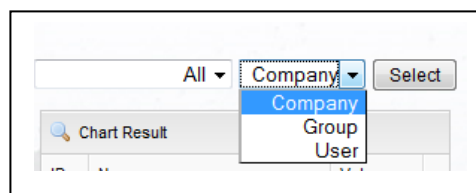
6. Alternatively, double click on the required line.

### 6.1.1 Viewing Top Prospect Information in Graphical Format:

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



2. Select 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.

Chart Result		
ID	Name	Value
176	Fourth Telco Channel Ltd	£1961846.1
105	Second Telco Channel Ltd	£1072364.8
102	Telco Channel Ltd	£715026.07
106	Third Telco Channel Ltd	£435945
103	Telco Manufacturer Ltd	£149268.57

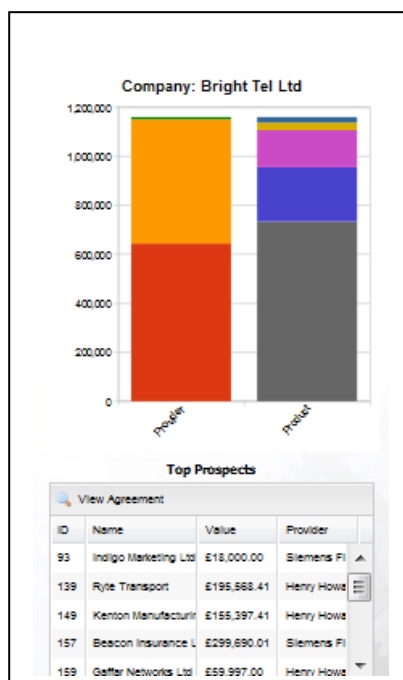
4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click

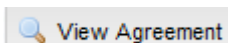


6. You will then be presented with the Top Prospect information as indicated on the following page.

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



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



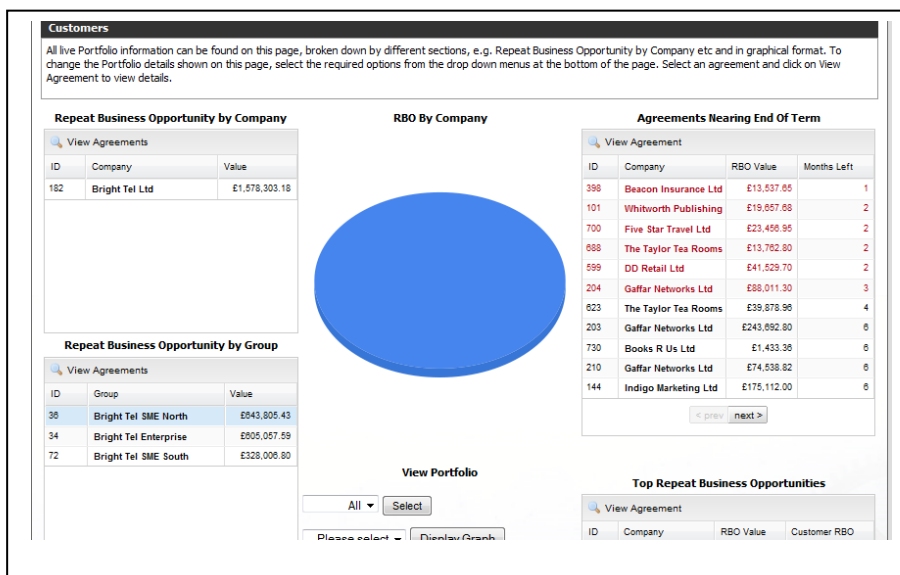
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

## 6.2. Customers:

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

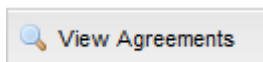
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

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



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

above, highlight the relevant line within the table and click



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

The screenshot shows the LEASE-DESK.COM dashboard. At the top right is a 'Logge' button. Below the header is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. A 'back' button is visible. The main section is titled 'Repeat Business Opportunity by Group' and states 'Below are the results from your search'. Below this are three tabs: 'View Agreement', 'View Log', and 'Summarise Notes'. A table displays the search results:

Id	Identifier	Company	Status	Primary User	RBO Level
445	IMPORT TEST4	Books R Us Ltd	Live	Martina Cole	28030.65
599	Live09	DD Retail Ltd	Live	Chris Wilson	41529.70
204	Chloe Alerts Testing 9 F	Gaffar Networks Ltd	Live	Lisa Rose Wyatt	88011.30
232	Chloe Test 16 Feb	H Fashion Retail Ltd	Live	Sharon Westliffe	8130.08
555	759-0555	HL Training Services Ltd	Live	Ashley Greene	31466.10

5. You then have the option to View an 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;

The screenshot shows the 'View Portfolio' screen. It has a 'Company' dropdown menu and a 'Select' button. Below that is a 'Please select' dropdown menu and a 'Display Graph' button. A table displays the portfolio items:

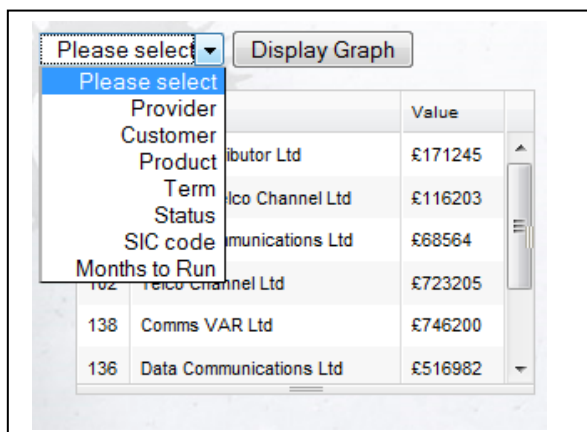
ID	Name	Value
105	Second Telco Channel Ltd	£69267
106	Third Telco Channel Ltd	£77707
104	Telco Distributor Ltd	£171245
102	Telco Channel Ltd	£103390

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

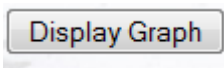
3. Click 

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

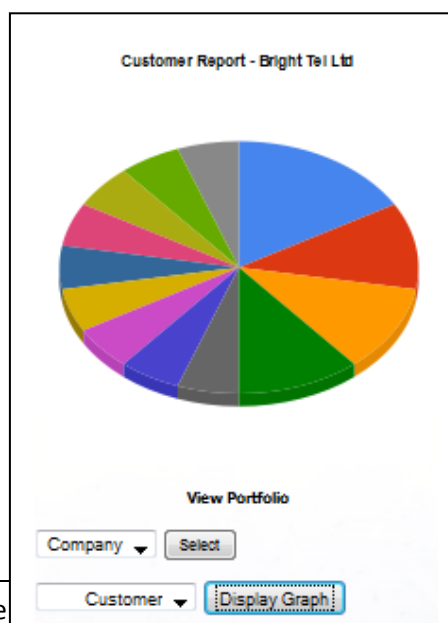
5. Next select the Agreement grouping from the drop down menu, as indicated below;



	Value
Provider	
Customer	
Product	
Term	
Status	
SIC code	
Months to Run	
102 Telco Channel Ltd	£171245
138 Comms VAR Ltd	£116203
136 Data Communications Ltd	£68564
	£723205
	£746200
	£516982

6. Highlight the required row from the table and click 

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



## 7. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to vendor users (Normal and Main) and administration users. As main user, dependant on your defined role, you will be able to see all of the system generated alerts associated with your viewable agreements or teams agreement information.

**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.

### 7.1 Viewing Alerts:

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



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

LEASE-DESK.COM

Logged in as: Noah Ark

Feedback Logout

Home Agreements Search Dashboard Alerts

back

**My Alerts**

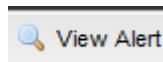
A full list of pending alerts requiring user action.

ID	Recipient	Company	Groups	Message	Time
1693	Noah Ark	Fourth Telco Channel Ltd	4th Telco Channel SME Telco Man Enterprise Channel Tea Eddie Large	New prospect agreement: Customer Name: Solto Technology Ltd Agreement ID: 573 Agreement Value: 19932.71 Provider: Henry Howard Finance PLC Regular Payment: 661.97 Payment Profile: 1+35 Financial Product Type: Finance Lease Financial Product Name: Fixed Term Rental Agreement Term Of Contract: Fixed Period Cancellation Notice: 90 Insurance Action: Forward Insurance Certificate Link: <a href="http://lease-desk.com/agreement/view/573/">http://lease-desk.com/agreement/view/573/</a>	22/04/2010 16:48:54

Quick Search Recipient Search Clear

10 of 2 Displaying 1 to 10 of 17 items

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



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

LEASE-DESK.COM

Logged in as: Noah Ark

Feedback Logout

Home Agreements Search Dashboard Alerts (17)

back

**View Alert**

next

Recipient: Noah Ark

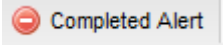
Subject: New Prospect Agreement

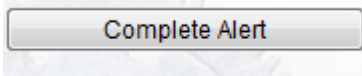
Message: New prospect agreement:  
Customer Name: Solto Technology Ltd  
Agreement ID: 573  
Agreement Value: 19932.71  
Provider: Henry Howard Finance PLC  
Regular Payment: 661.97  
Payment Profile: 1+35  
Financial Product Type: Finance Lease  
Financial Product Name: Fixed Term Rental Agreement  
Term Of Contract: Fixed Period  
Cancellation Notice: 90

Time: 22/04/2010 16:48:54

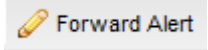
Complete Alert

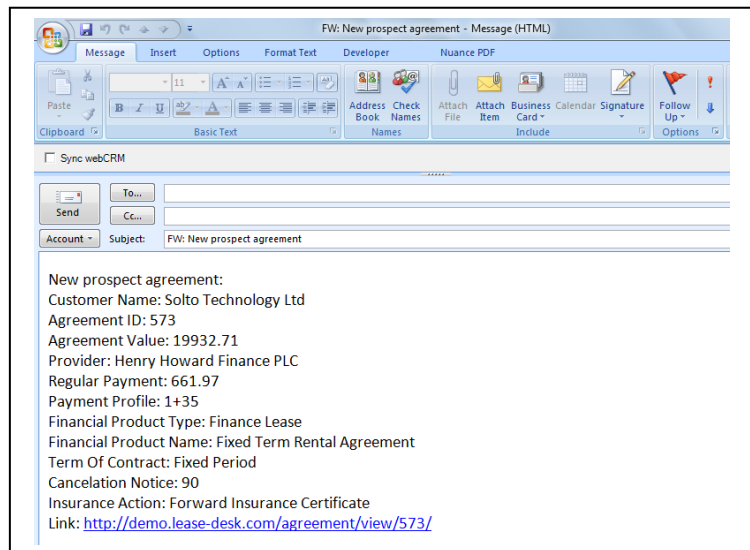
## 7.2 Completing Alerts:

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;

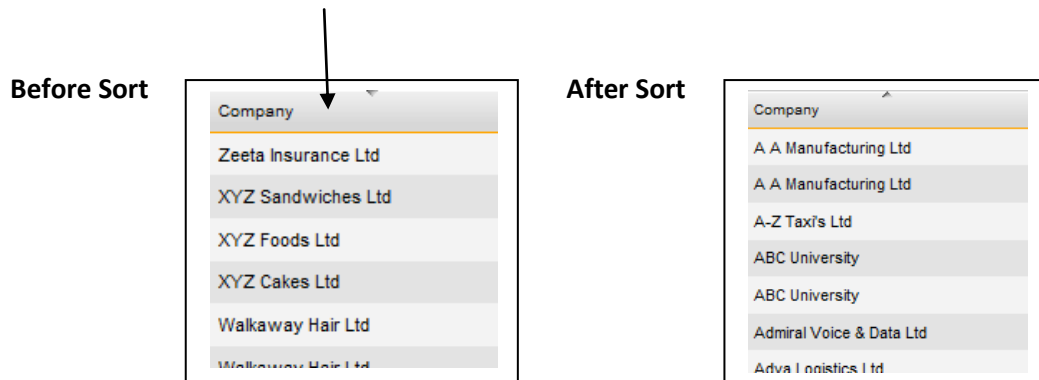


## 8. General Functionality:

### 8.1. Sort:


Within Lease-Desk, 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.



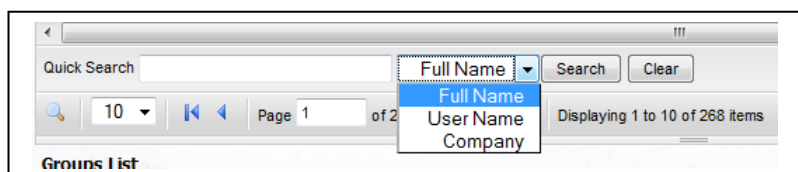
## 8.2 Quick Search:

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

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

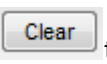


2. This will then bring up the quick search options for the screen you are in, as per below;



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

4. Click  to search for the information





5. Click  to start from the beginning.

### 8.3 Refresh:

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

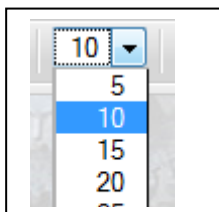
### 8.4 Scrolling through records:

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

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

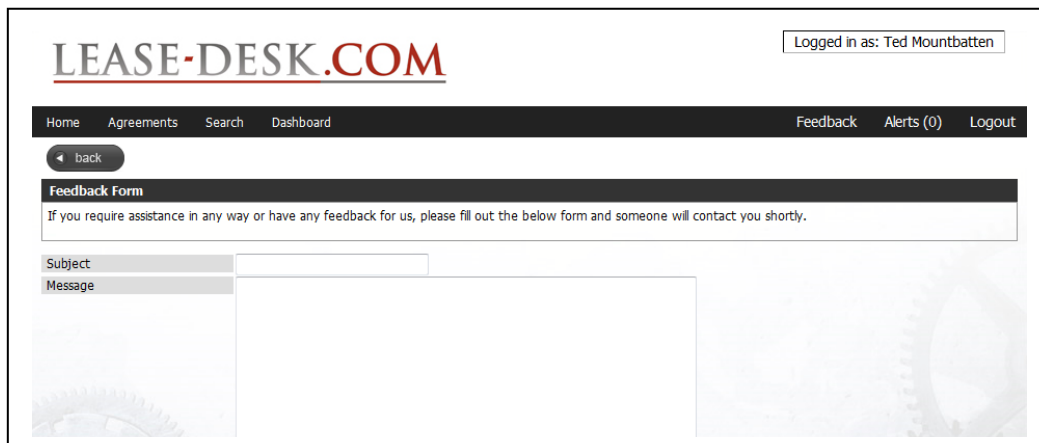
### 8.5 Changing the amount of records per view:

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

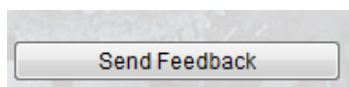


## 9. Feedback:

3. To contact Proctor Consulting's Lease-Desk administration team with any feedback, query or issue, from the main menu select **Feedback**
4. You will then be presented with the 'Feedback Form' screen as indicated on the following page;



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



7. Once completed, click
8. You will then be presented with the following confirmation message;

**Feedback Form: Complete**

Thank you for completing the feedback form

9. 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 Proctor Consulting 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?

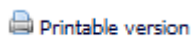
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

### 3. My company information on the home page is incorrect but I am unable to amend it, how can I do this?

Either contact Proctor Consulting 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 information please contact us at;

**Proctor Consulting UK Ltd,**  
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)**