LEASE-DESK

Normal Access User Manual

Version 2.1

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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.

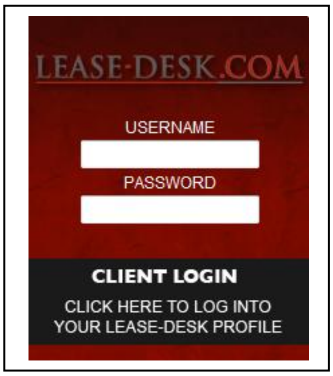
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

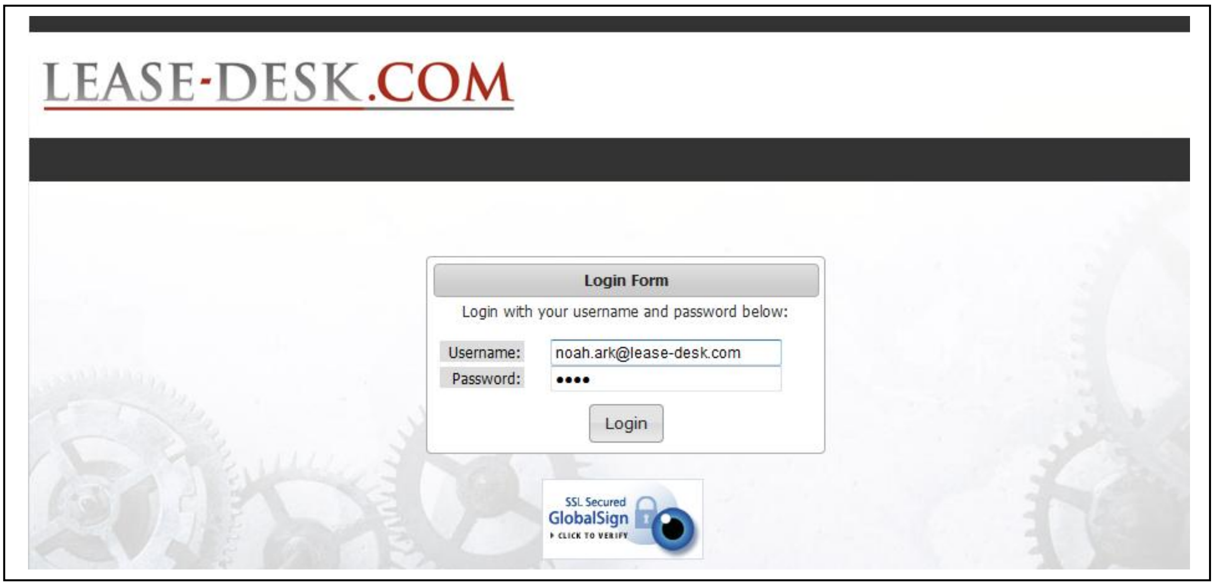
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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

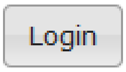
2. Logging into Lease-Desk:

1. Go to www.Lease-Desk.com and click on the Client Login box as per below.



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

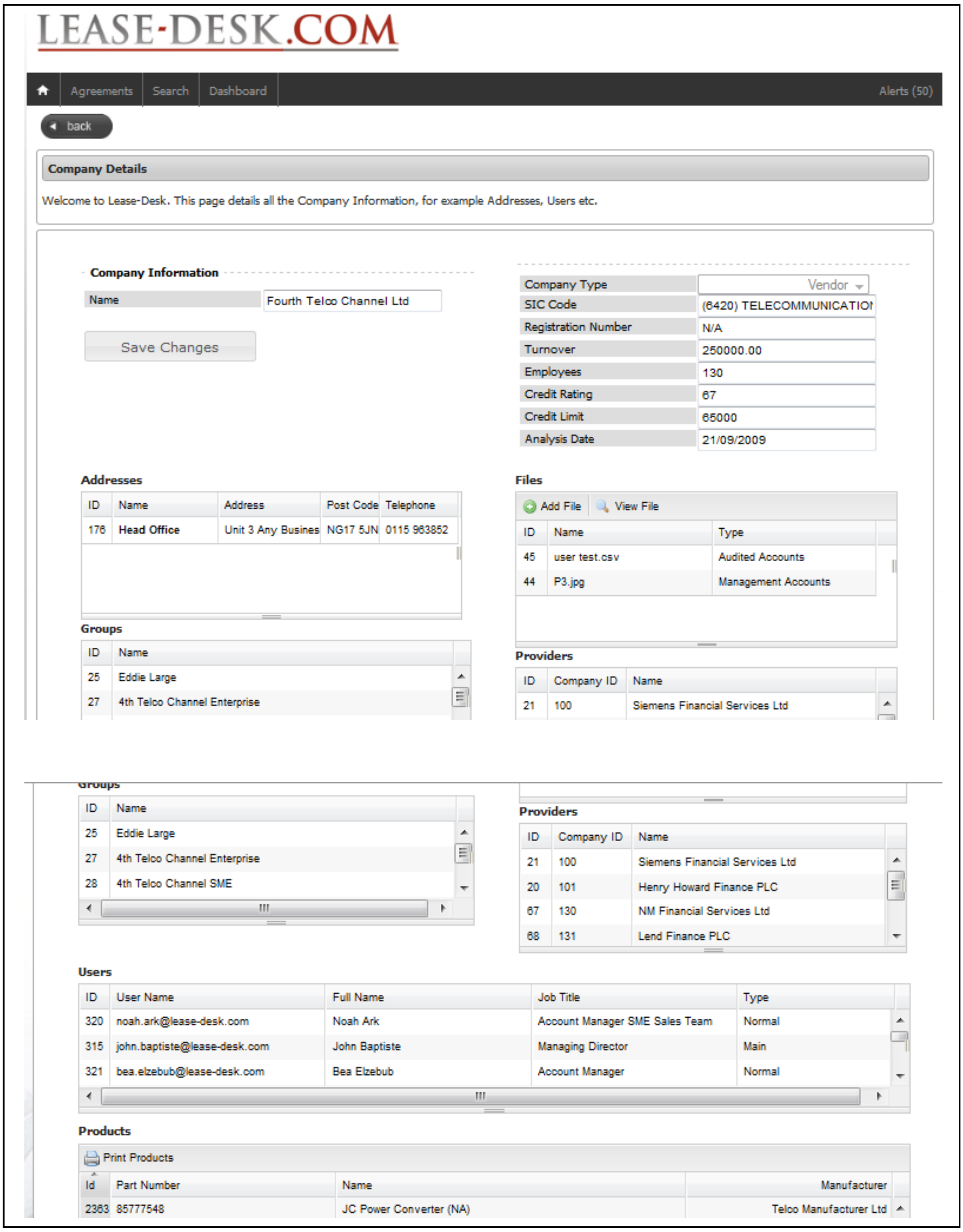


3. Enter your details and click on 

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

3. Home Screen: Adding, & Viewing

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



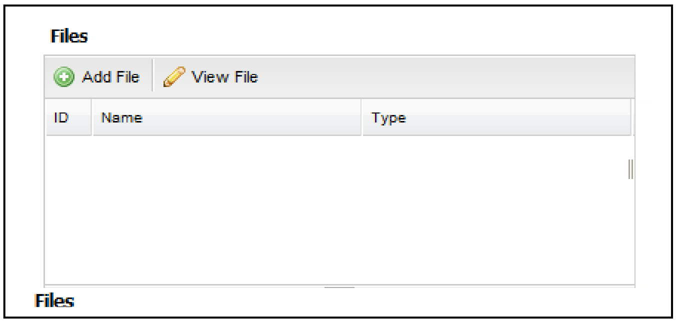
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider).

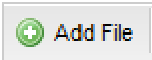
3.1. Adding and Viewing Files:

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

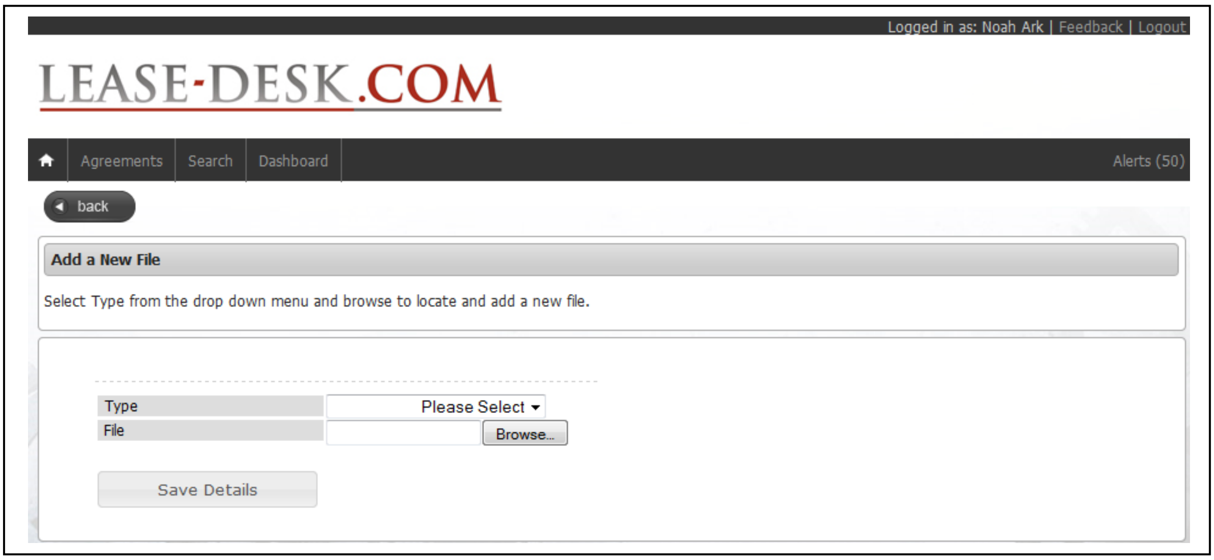
3.1.1. Adding a File:

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



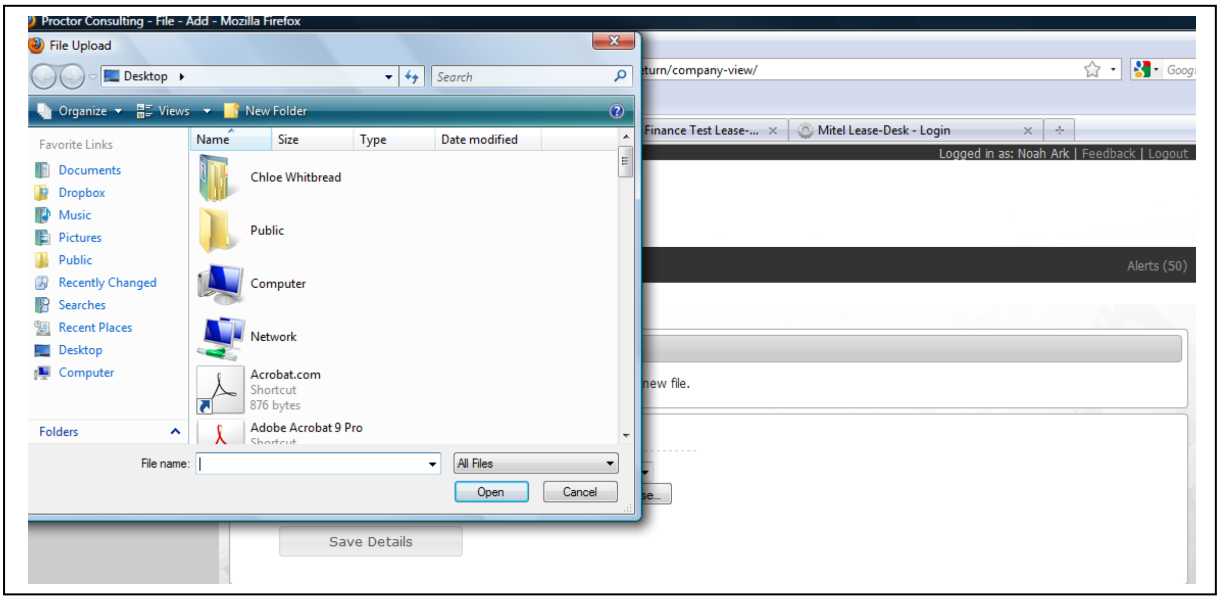
2. To add a file against your Company Details, click 

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



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

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

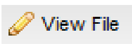


6. To save the file against your Company Details, click 

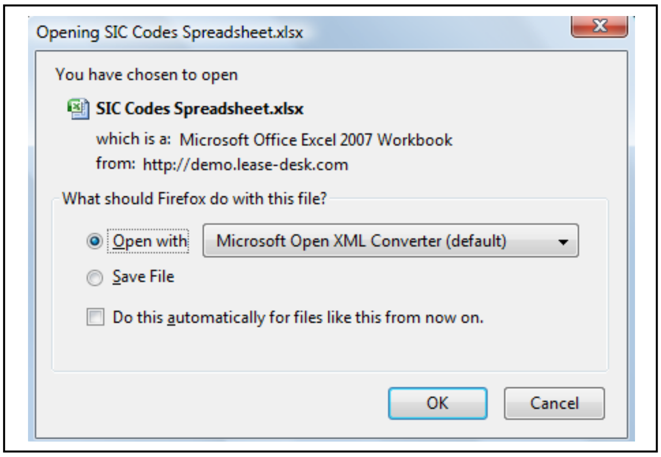
7. You will then be taken back to the ‘Edit Company Details’ screen and receive the following confirmation message;

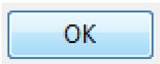
3.1.2. Viewing a File:

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

2. Click 

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



4. Click 

to view the file.

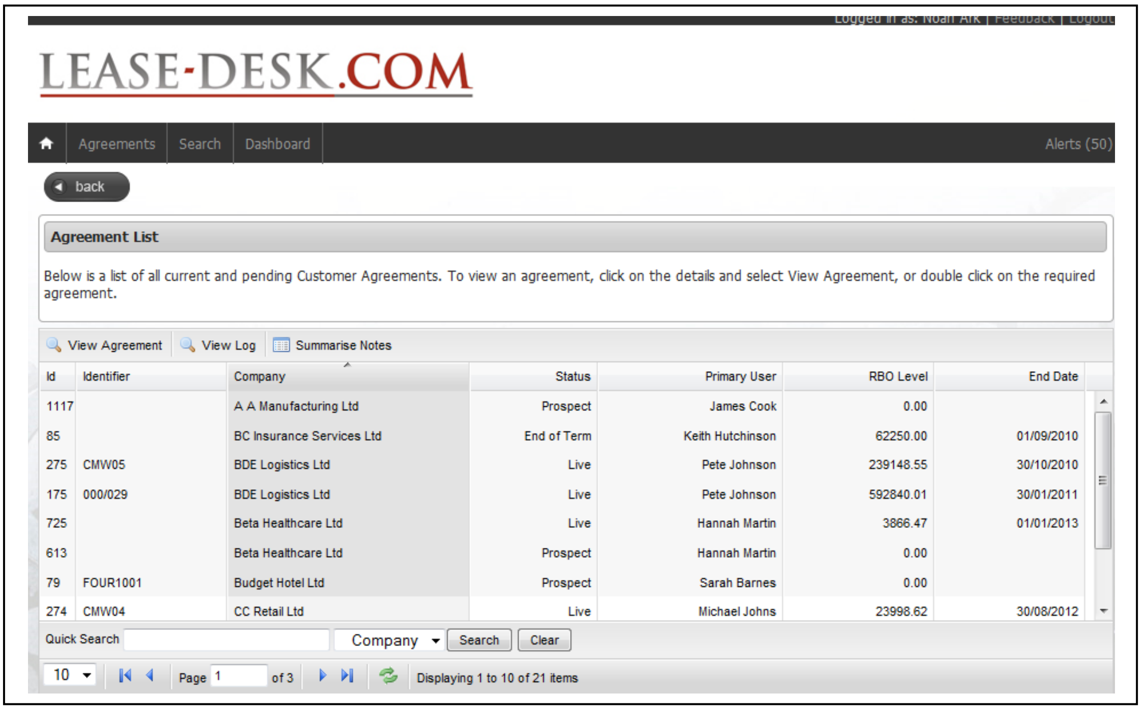
4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log

4.1. Viewing a Live or Prospect Agreement:

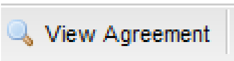
1. From the top toolbar menu, select 

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).

This is indicated on the following page.



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.

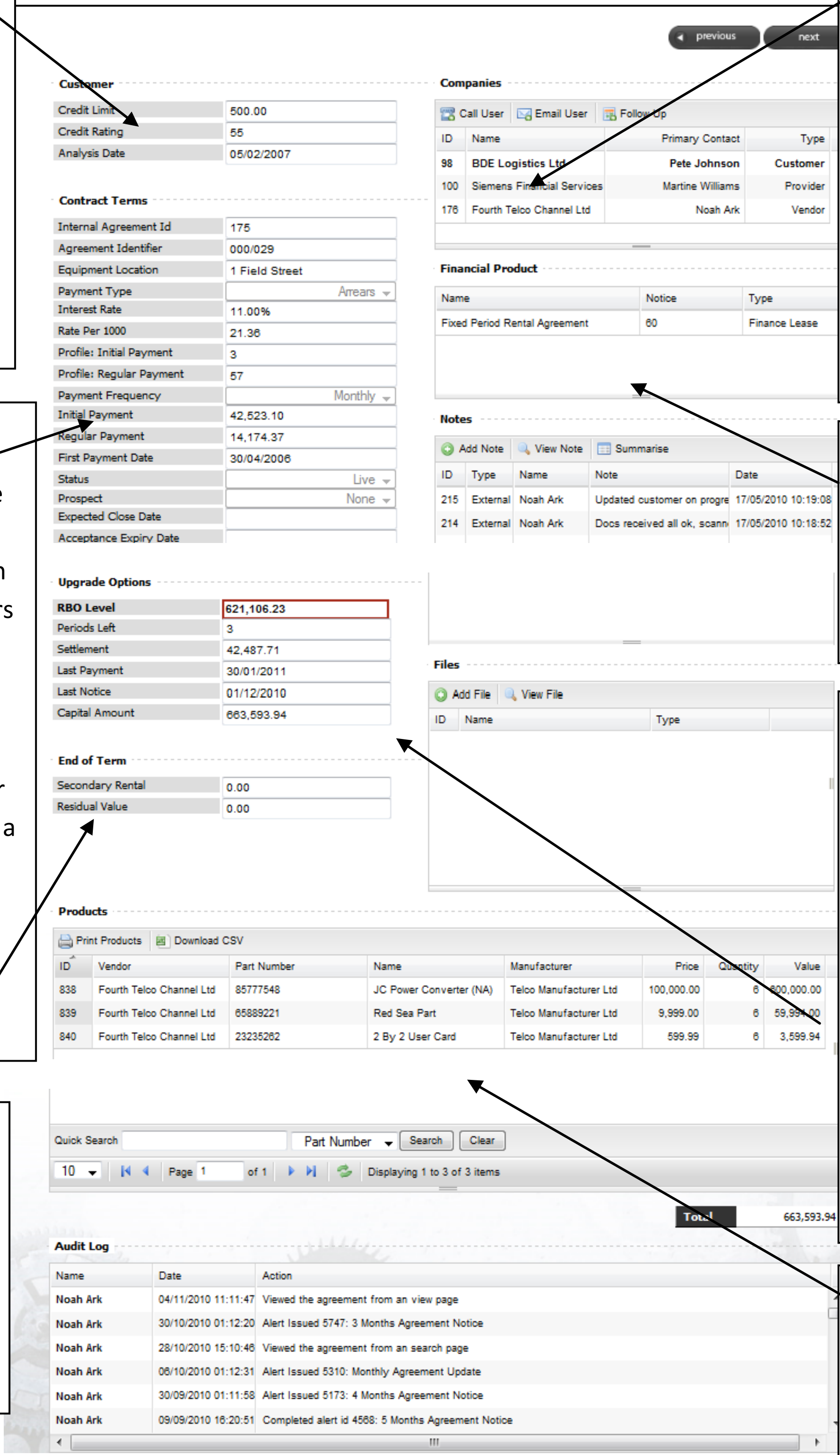
(This is indicated on the following page).

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.

Companies Information:

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



Contract Terms:

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

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

Financial Product Information:

This details the Financial Product information

Upgrade Options:

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

End of Term:

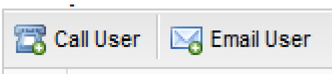
Indicates whether the Financial Product carries secondary rentals and if so what the figure would be.

Product Information:

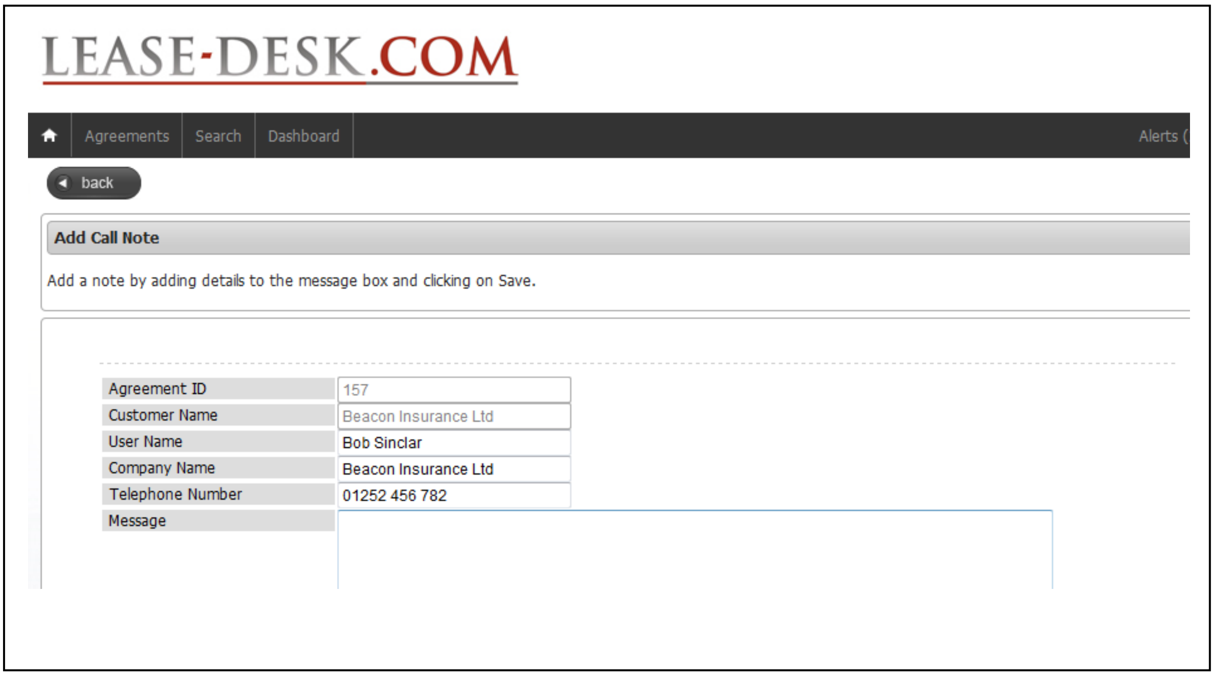
This lists the Product (s) within the agreement.

4.1.1 Calling or Emailing a Primary Contact:

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



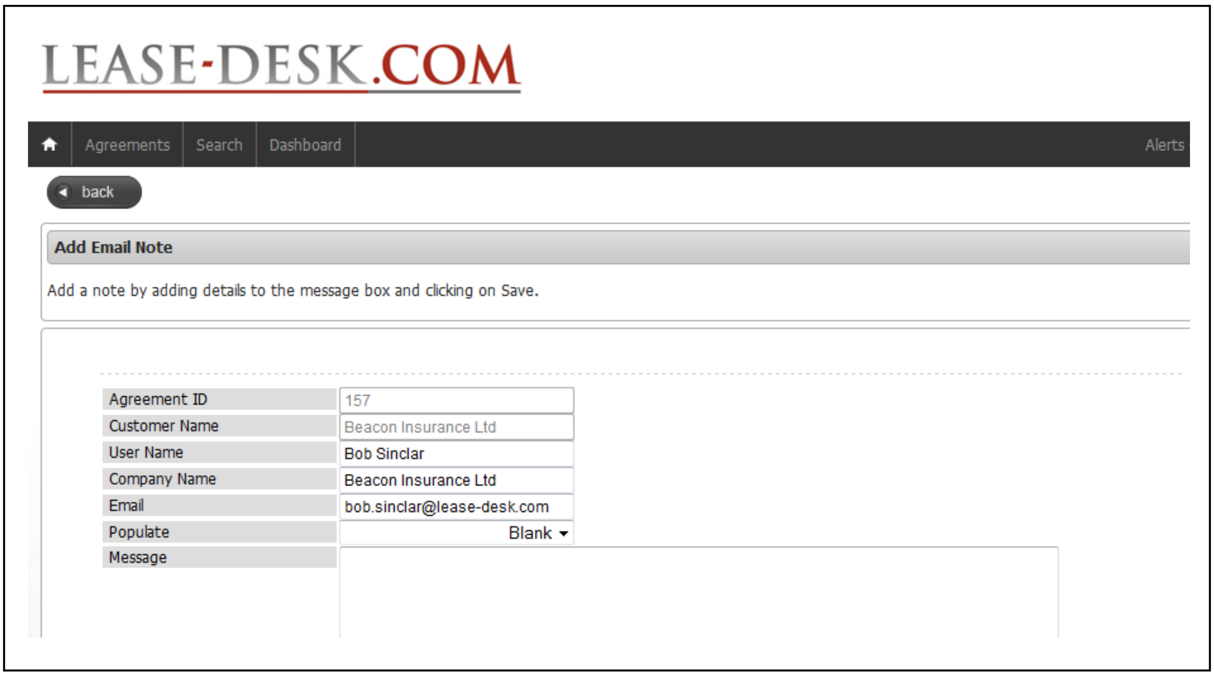
2. If you have selected the ‘Call User’ option, you will then be presented with the following screen;



3. Complete the details and click 

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

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

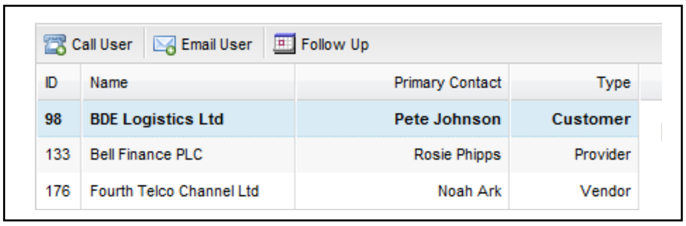


6. Select either ‘Blank’ or ‘Agreement Details’ from the ‘Populate’ dropdown list.

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

4.1.2 Creating Follow Ups:

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

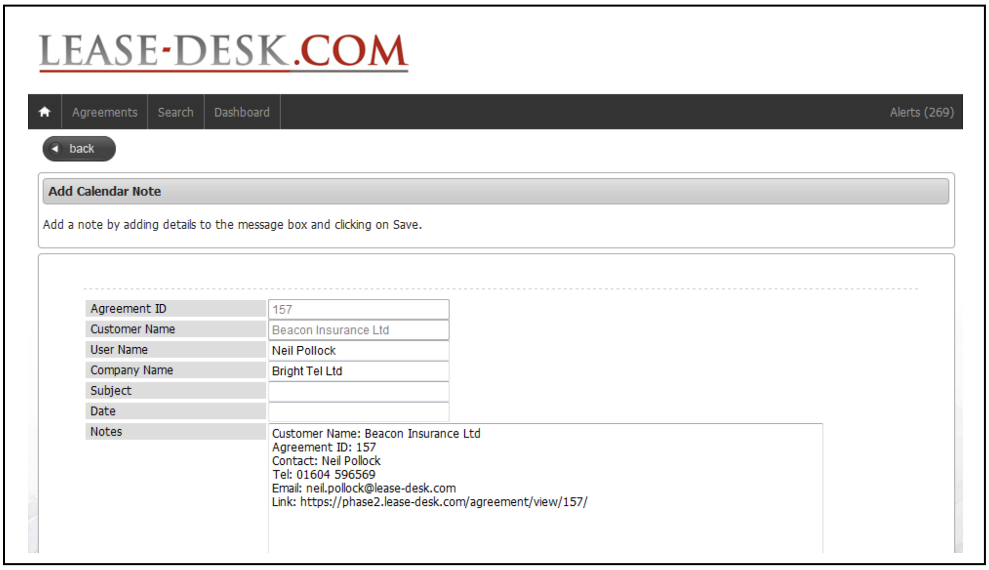


Call User | Email User | Follow Up

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 Follow Up

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

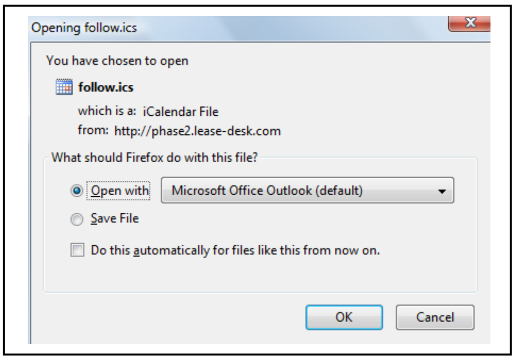


4. Enter a ‘Subject’ line and then click in the ‘Date’ box to bring up a calendar.

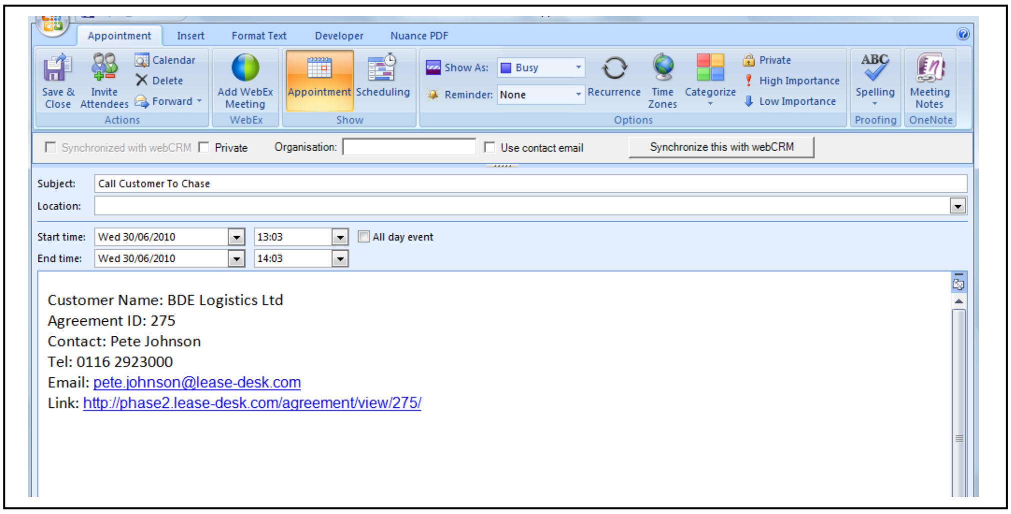
5. Set the date and time for the follow up and then enter any other details into the ‘notes’ box.

6. Click Open In Local Calendar to open up your email or Save Details to save the information added.

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;



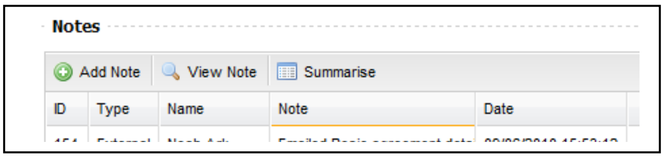
9. Click ‘Save & Close’ to then add to your outlook calendar as a reminder.

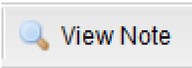
4.1.3 Adding and Viewing a File:

1. To Add or View a File, follow chapter **3.1. Adding and Viewing Files**

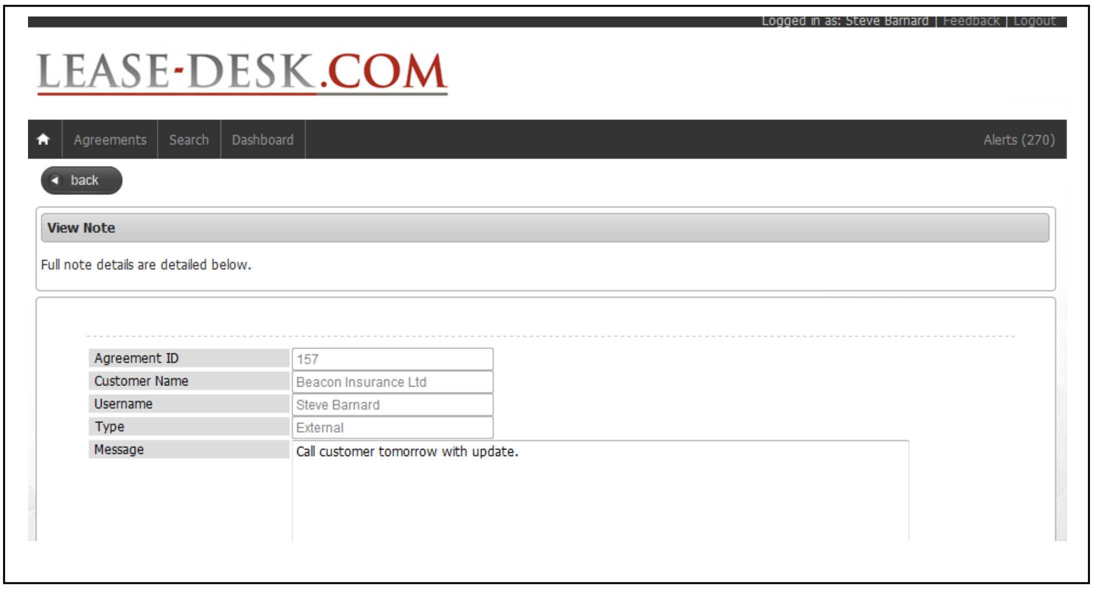
4.1.4 Viewing a Note:

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



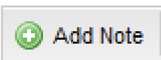
2. Highlight the note required and Click 

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

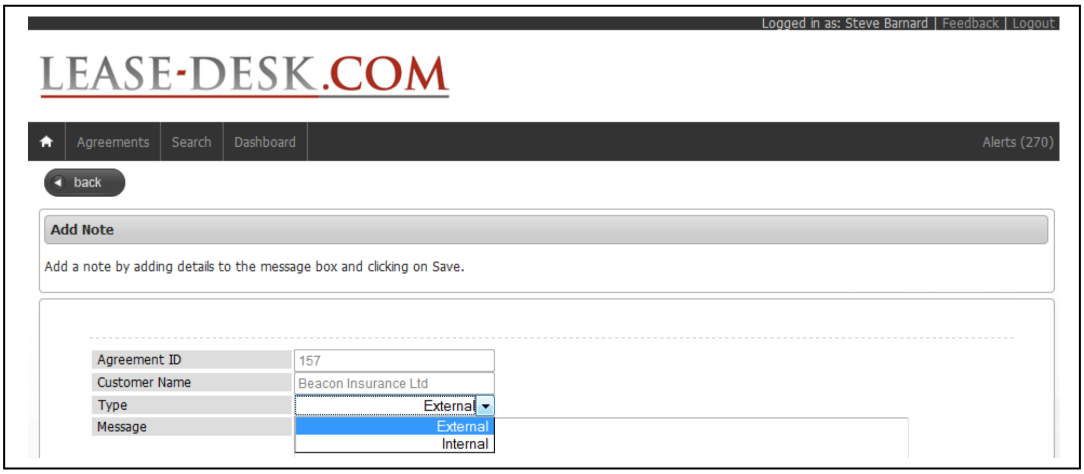


4.1.5 Adding a Note:

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.

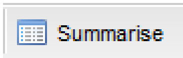
Note: An External note will generate an email to all users that can view the particular agreement and can be seen by everyone. An internal note can only be viewed by the users that are in the same organisation as the user inputting the note.

4. Type your message into the blank message box.

5. Click 

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

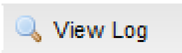
4.1.6 Summarising Notes:

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

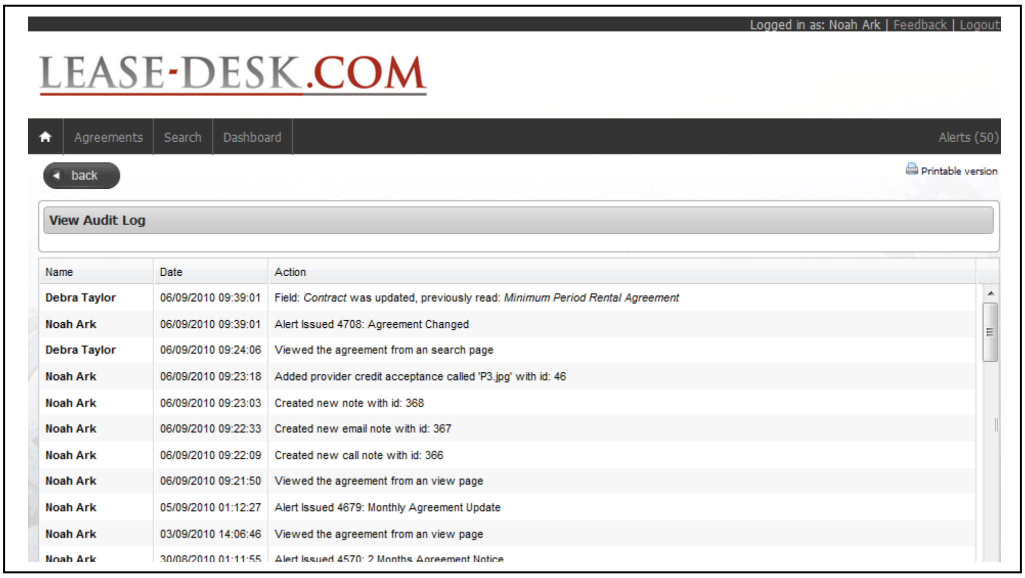
2. You will then be presented with the following View Summarised Notes screen;

4.2. Viewing an Audit Log:

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

A) Either highlight the required Agreement from the main Agreement Lists screen as indicated previously and then click 

to receive the following screen;



or

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

Audit Log

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

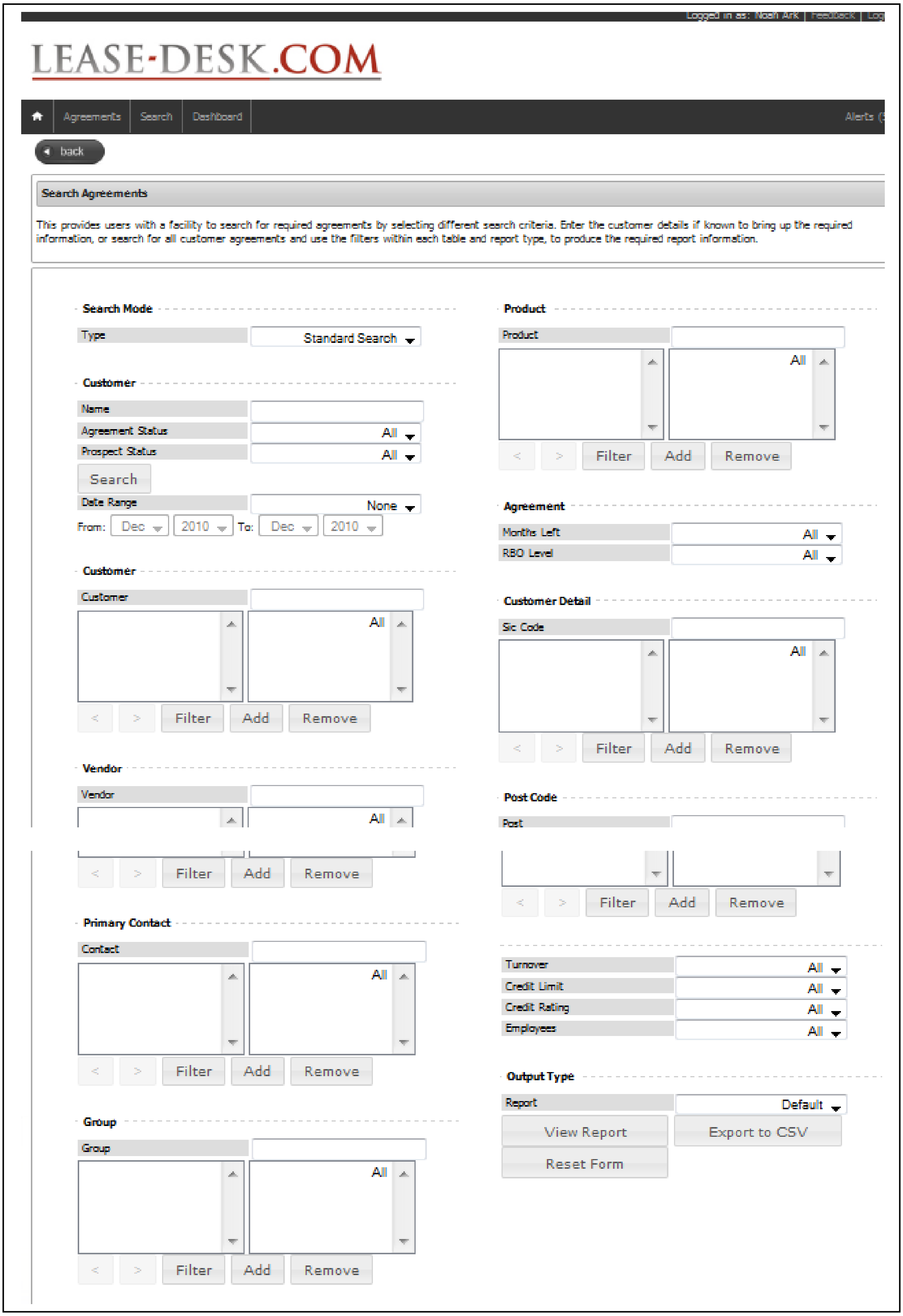
2. You will then be presented with the 'View Audit Log' screens which details all user action against the selected Agreement, as detailed below;

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

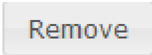
5.0 Search:

1. Go to Search on the top main menu.

2. You will be presented with the following 'Search Agreements' screen;

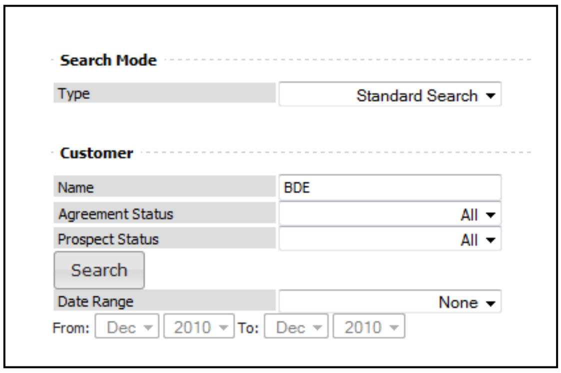

Logged in as: Noah Ark | Feedback | Log
LEASE-DESK.COM
Agreements
Search
Dashboard
Alerts
back
Search Agreements
This provides users with a facility to search for required agreements by selecting different search criteria. Enter the customer details if known to bring up the required information, or search for all customer agreements and use the filters within each table and report type, to produce the required report information.
Search Mode
Type
Standard Search
Customer
Name
Agreement Status
All
Prospect Status
All
Search
Date Range
None
From: Dec 2010 To: Dec 2010
Customer
Customer
All
Filter
Add
Remove
Vendor
Vendor
All
Filter
Add
Remove
Primary Contact
Contact
All
Filter
Add
Remove
Group
Group
All
Filter
Add
Remove
Product
Product
All
Filter
Add
Remove
Agreement
Months Left
All
RBO Level
All
Customer Detail
Sic Code
All
Filter
Add
Remove
Post Code
Post
Filter
Add
Remove
Turnover
All
Credit Limit
All
Credit Rating
All
Employees
All
Output Type
Report
Default
View Report
Export to CSV
Reset Form

3. The Search Agreements screen, allows you to search for all agreement information that you have access to (determined by role type), by selecting the different filters required.
4. To bring up the information in any of the tables, click 

5. To remove any data selected, click 

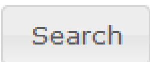
5.1. Searching for Specific Customer Agreement Information:

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

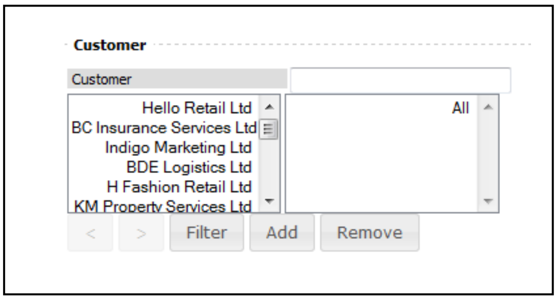


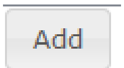
2. Complete the following details if required/known or keep as All;

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

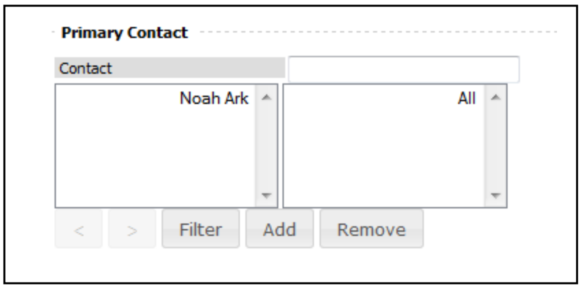
3. Click 

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;



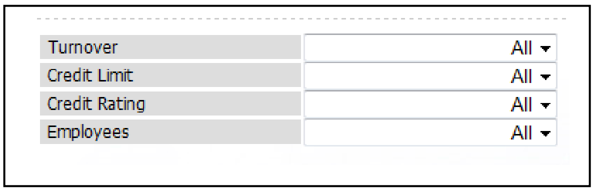
5. To include any of the produced data, within each table, highlight the required data, i.e. Primary Contact, and then click  .

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

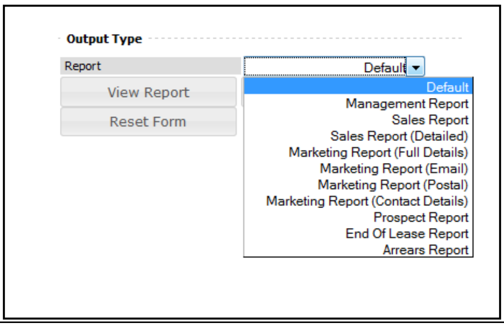


7. Carry on with each table required, following the previous step.

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



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



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

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

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

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

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

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

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

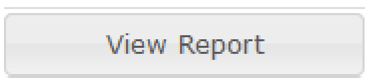
7. **Marketing Report (Postal):** As above, minus email but with full address details.

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

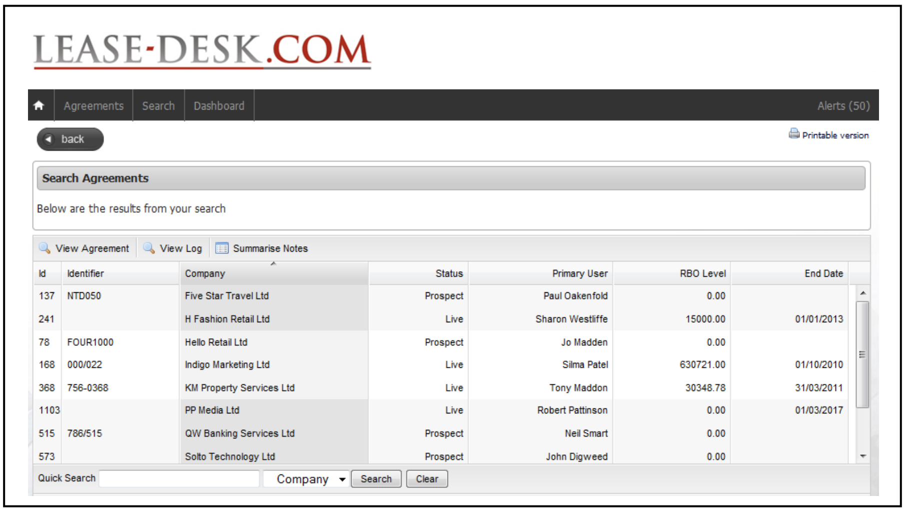
9. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

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

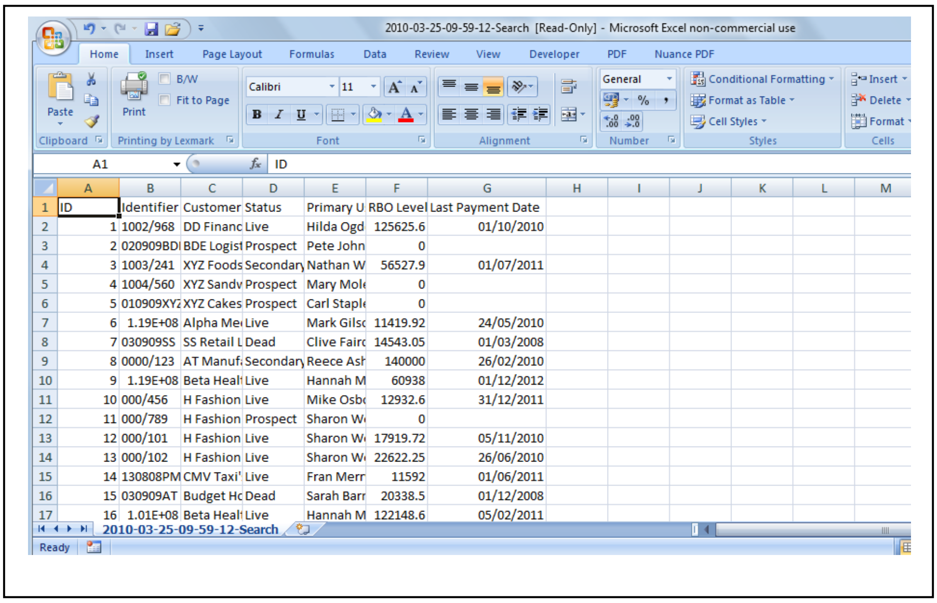
11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

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

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

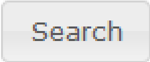


or **Export to CSV** to view in CSV format as per the following page;



5.2. Searching for all Customer Agreement Information:

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

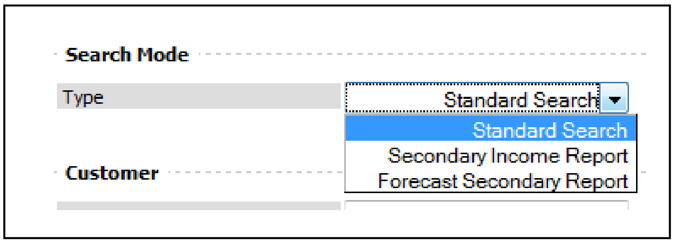
2. Click 

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

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

5.3. Changing the Search Mode:

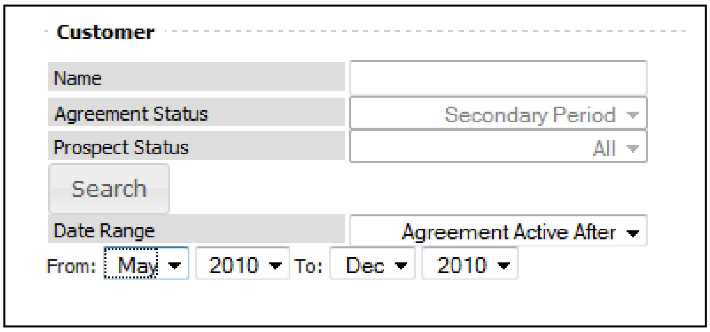
1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;



5.3.1 Secondary Income Report

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

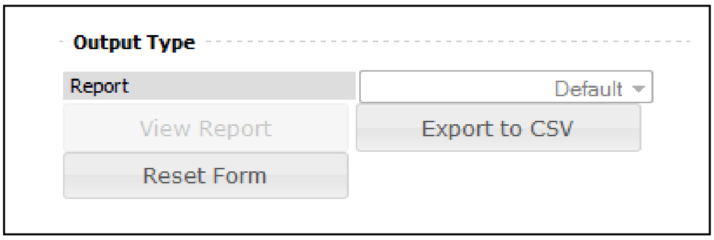
2. Next, select the date range that you wish to search for, as indicated below.



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

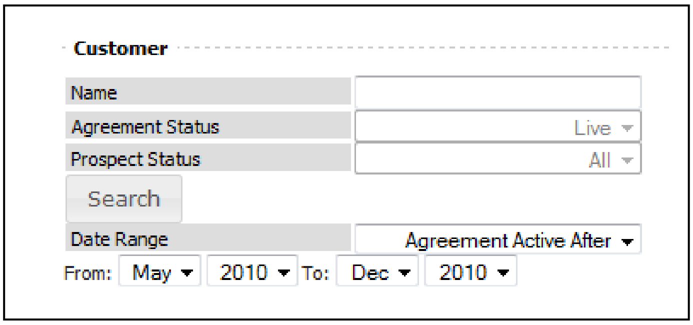
4. Note: This report type is only viewable via CSV format. To view the data, click on 

as indicated below;



5.3.2 Forecast Secondary Report

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

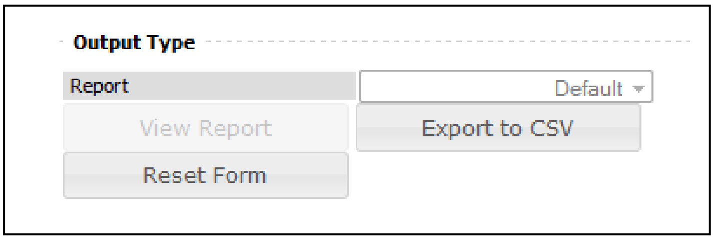


2. Next, select the date range that you wish to search for, as indicated below.

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

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

as indicated below;



6. Dashboard:

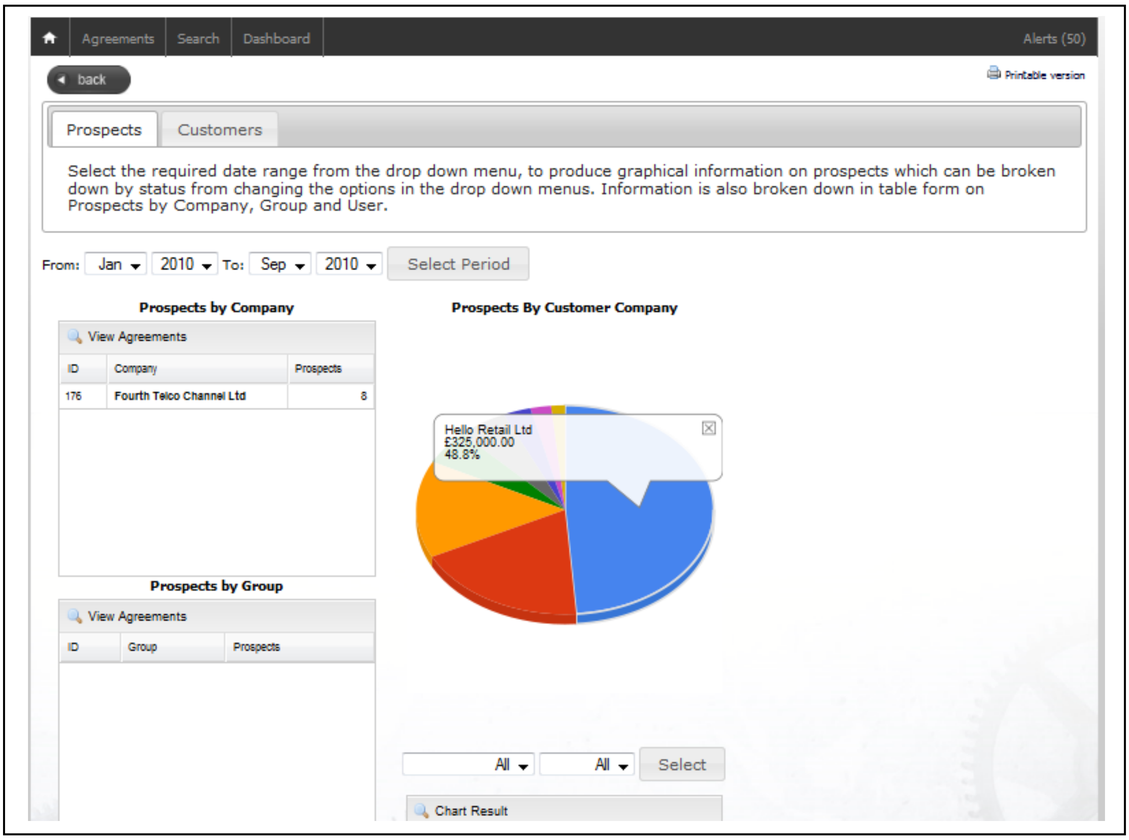
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

6.1. Prospects:

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

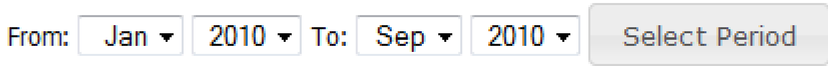
1. Go to Dashboard on the main top menu.

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

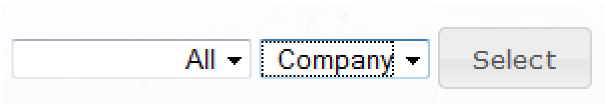


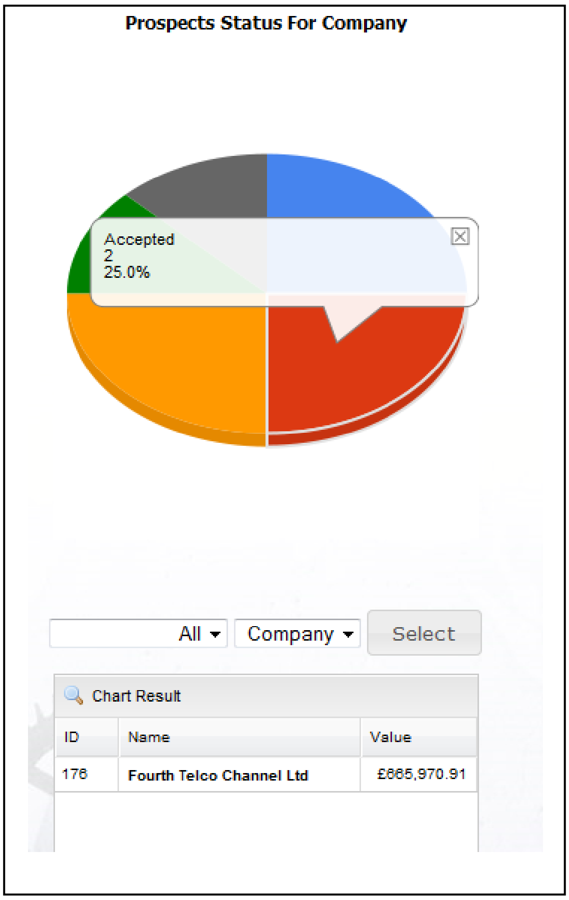
3. From the date range at the top of the page, select the required date and click

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

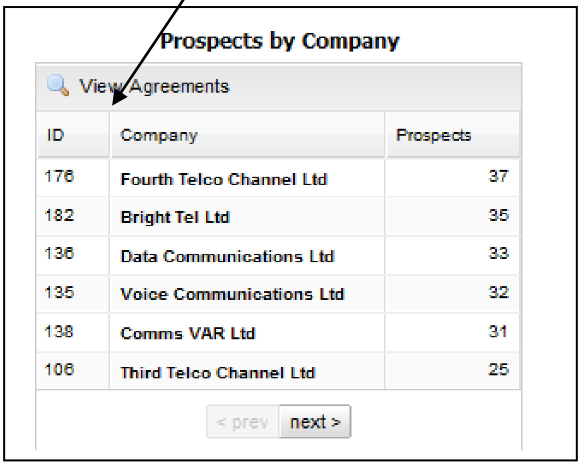


5. Click on ‘Select’, as indicated below, and the graph will then display all of the Prospect Milestones broken down.





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


Prospects by Company

View Agreements

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

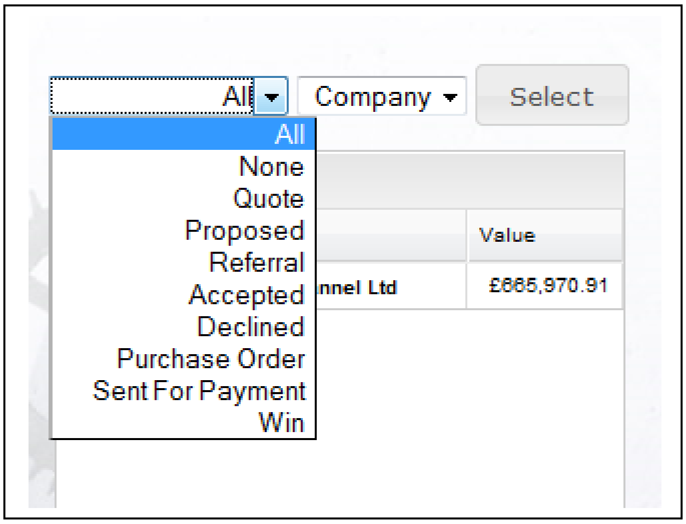
< prev next >

6. Alternatively, double click on the required line.

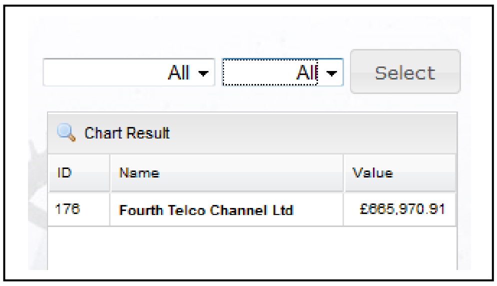
Note: To view any of the segments within the Pie Chart, simply click on the required segment and you will be taken to the agreements associated with the chosen area selected.

6.1.1 Viewing Top Prospect Information in Graphical Format:

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

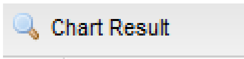


2. Select All, User, Group or Company from the second drop down menu box and press Select.



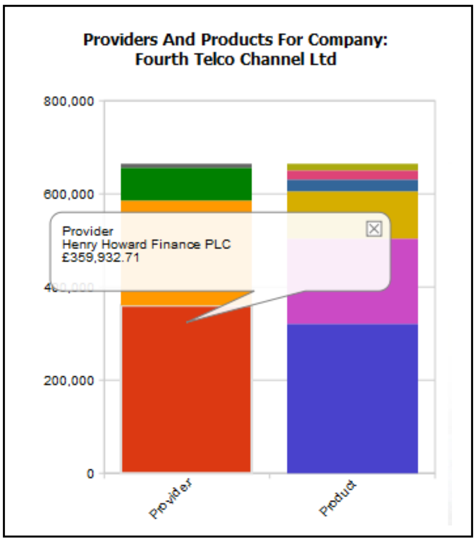
3. You will then be presented with the required information within the table below.

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

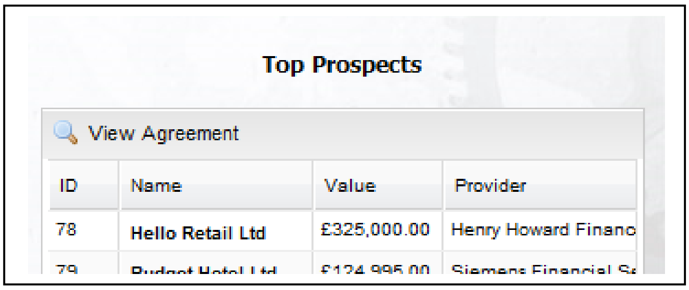
5. To view the information in graphical format, click 

6. You will then be presented with the Top Prospect information as indicated below;

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

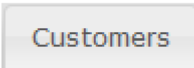


7. To View the Agreement information, highlight the line in the table below the graph and click 



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

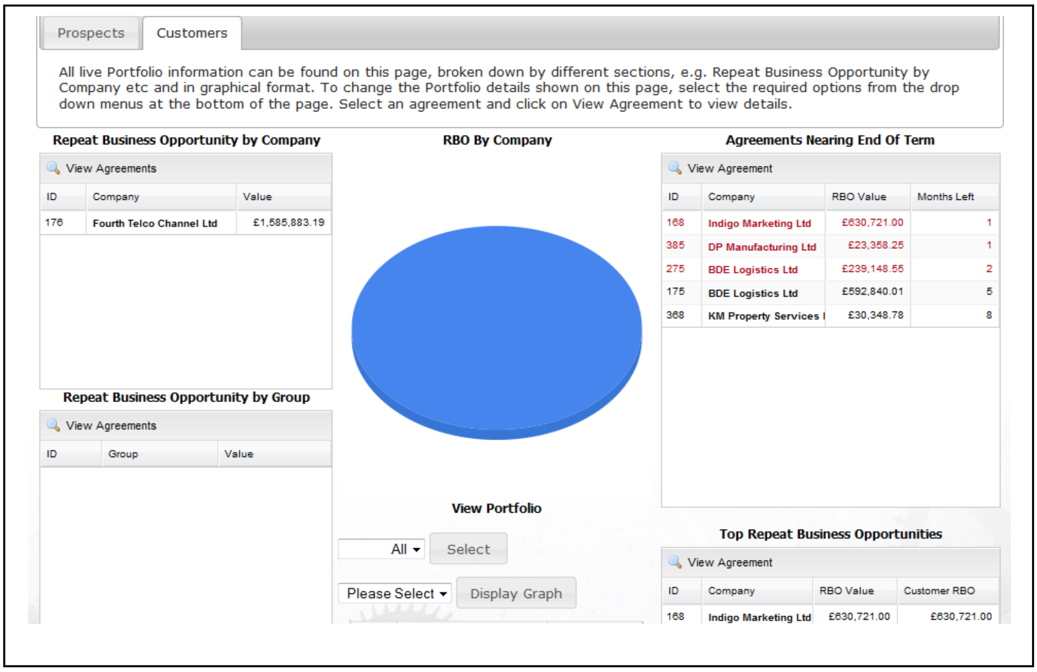
6.2. Customers:

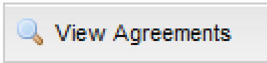
1. Go to 

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

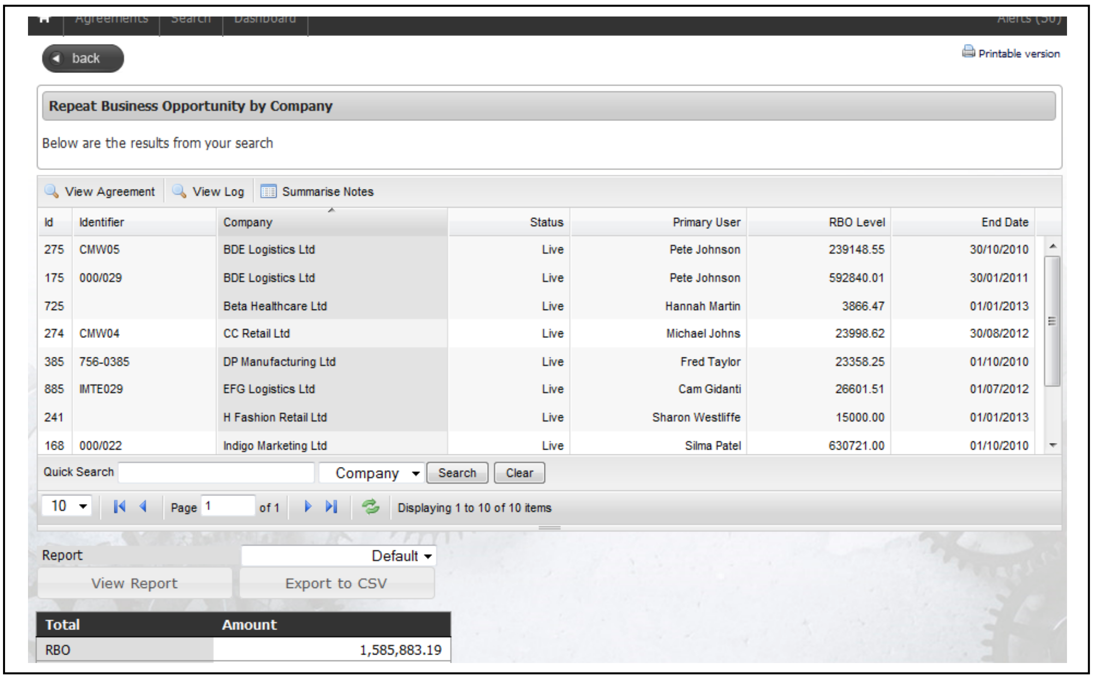
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

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



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

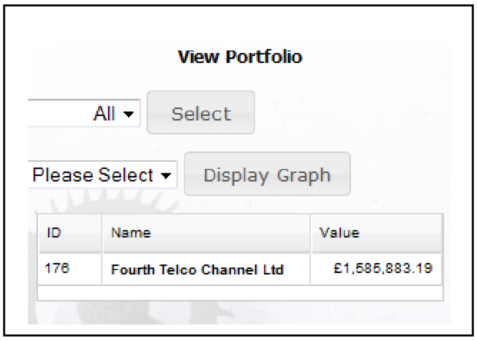
4. Dependent upon which option you select, you will then be presented with the individual Agreement Information in table format, as indicated below;



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

6.2.1 Viewing/Amending Portfolio Information:

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

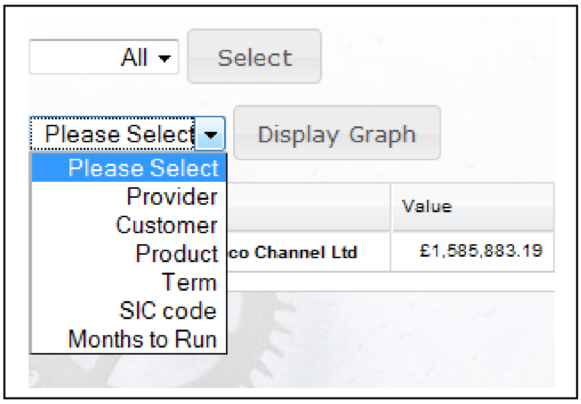


2. In the first drop down menu, select the required grouping option (All, Company, Group, User).

3. Click 

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

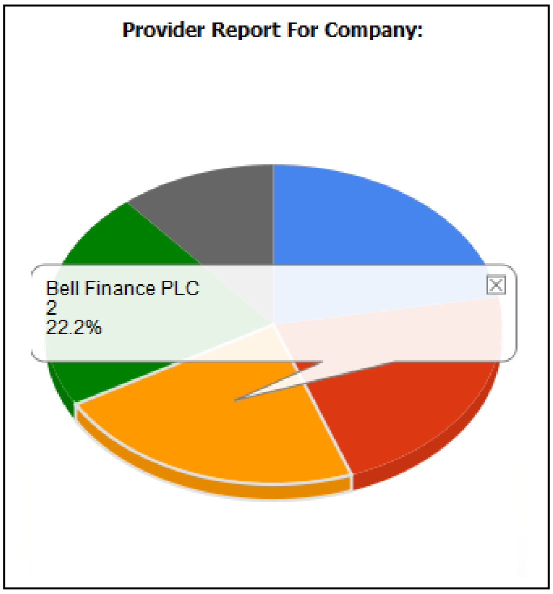
5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click 

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

Note: To view the legend, hover over the graph segments with your mouse.



7. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to Vendor users (Normal and Main) and Super Users. As Main User, dependant on your defined role, you will be able to see all of the system generated alerts associated with your agreements and/or Groups.

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 in reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through its term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.

- One month before an agreement reaches its end of term; in order to notify the customer that they need to provide written confirmation to the Financial Provider if cancelation is required.
- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

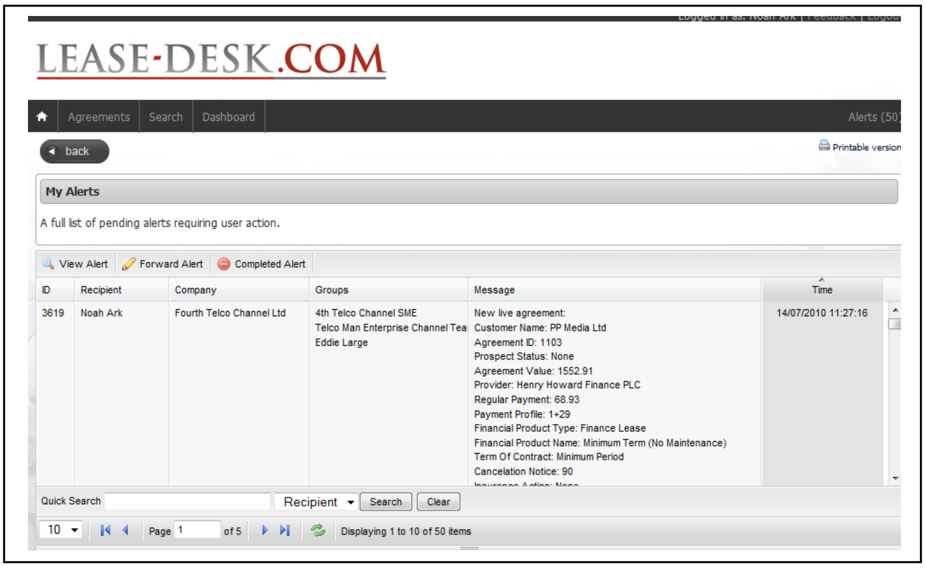
Note: ***Emails generated go out on the hour and every, 15, 30, 45 minutes past the hour.***

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

7.1 Viewing Alerts:

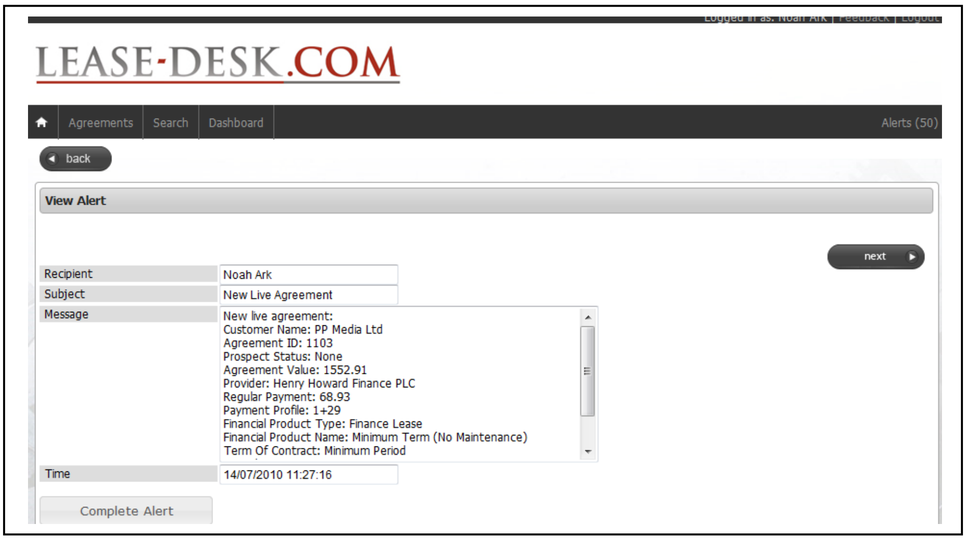
1. To view your individual or team user alerts, select Alerts (50) from the top menu.

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



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

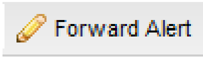
4. You will then be presented with the following screen;



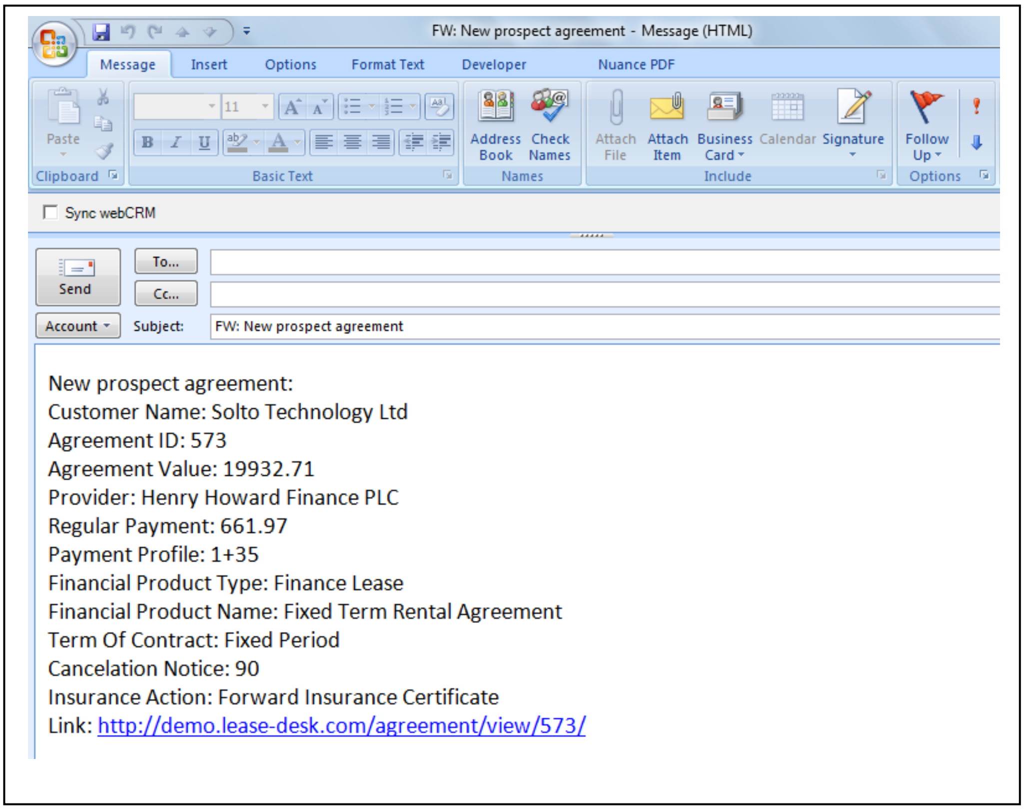
7.2 Completing Alerts:

1. Once the alert has been read and the action has been taken, click Completed Alert from the main alert list view or Complete Alert 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:

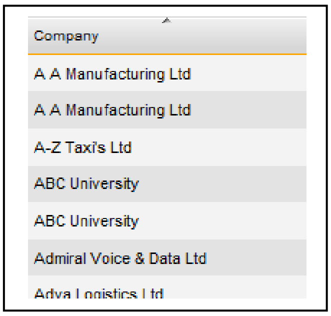
8.1. Sort:

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

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

Before Sort

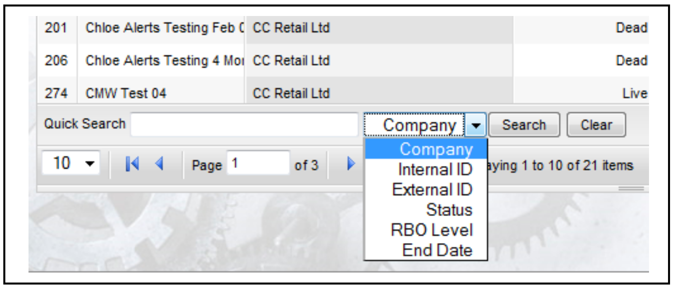
After Sort



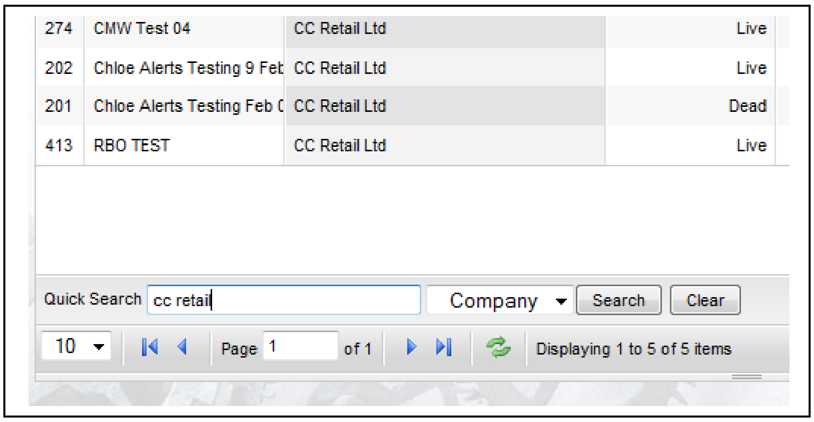
8.2 Quick Search:

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

1. To change the Search option, click on the drop down menu as per below;



2. Enter the search detail and click on  to bring up the details.



3. Click Clear 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

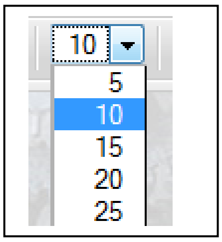
Forward to end of records

Go back to previous page of records

Go to the start of the records

8.5 Changing the amount of records per view:

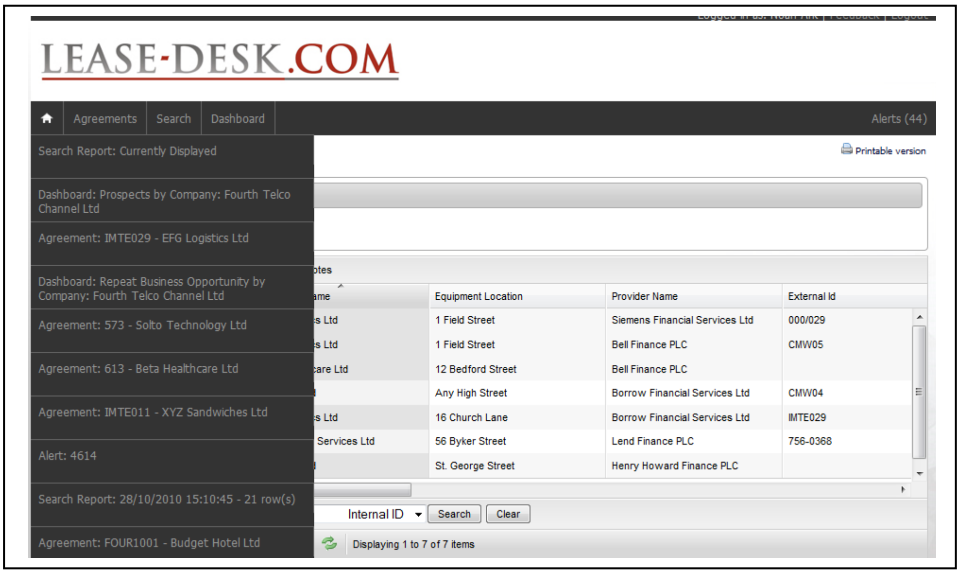
2. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



8.6 Last 10 Records:

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

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

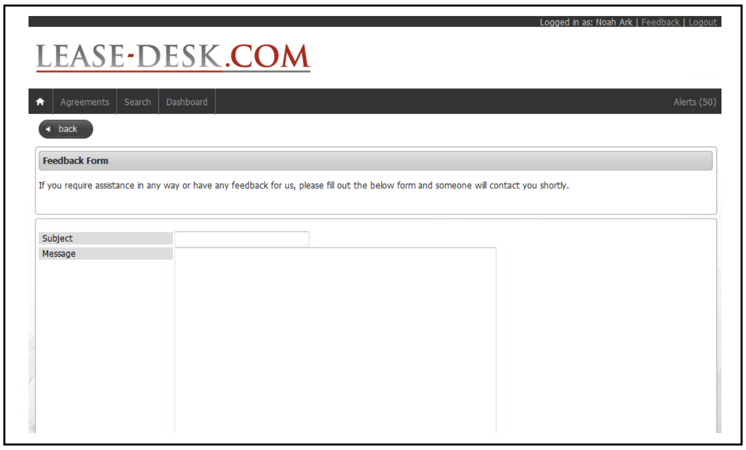


3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

9. Feedback:

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

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



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

4. Once completed, click 

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

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

10. Frequently Asked Questions:

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

Email Proctor Consulting at support@lease-desk.com or contact us via telephone on 01302 245310 and we will reset your password for you and answer any questions you may have.

2. Why are the agreements with 3 or less months left highlighted in red on the Customer Dashboard?

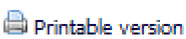
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

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

Either contact 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
www.Lease-Desk.com