

LEASE-DESK

Main Access User Manual

Version 2.0



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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.

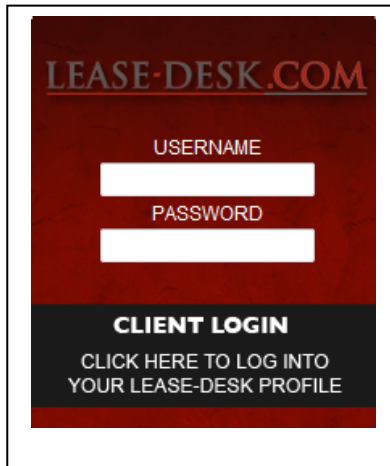
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will generally have 'reader' access rights to the groups that you have been set up in by the administrators. This means that you can view all of the live and pending agreement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

The terminology for all role types is defined below;

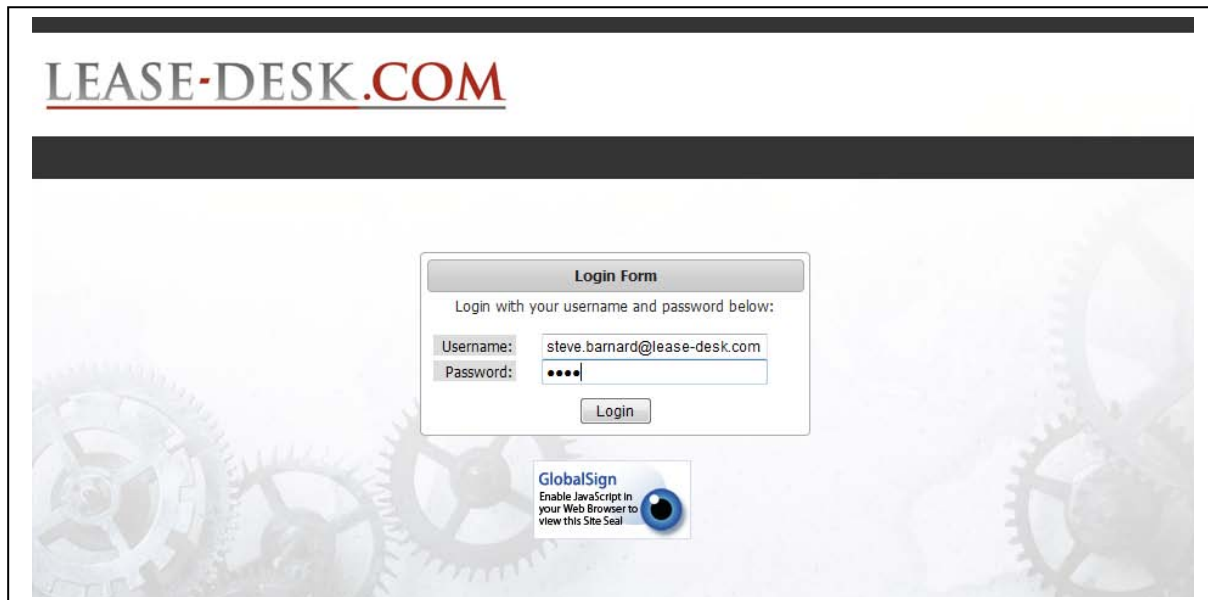
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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



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



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;

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (86)

back

Company Details

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

Add Address Edit Address Set As Main Delete Address

| ID | Name | Address | Post Code | Telephone |
|-----|-------------|--------------------|-----------|--------------|
| 184 | Main Office | Unit 42 Sketherton | NN11 2EW | 01604 596568 |

Files

Add File View File Delete File

| ID | Name | Type |
|----|-------------------------|-------|
| 5 | Demo Company Import.csv | Other |

Groups

| ID | Name |
|----|-----------------------|
| 34 | Bright Tel Enterprise |
| 36 | Bright Tel SME North |
| 51 | Corrine Taylor |
| 55 | Teloo Man SMB South |

Providers

Associate Provider Delete Association

| ID | Company ID | Name |
|----|------------|--------------------------------|
| 33 | 100 | Siemens Financial Services Ltd |
| 34 | 101 | Henry Howard Finance PLC |
| 90 | 130 | NM Financial Services Ltd |
| 91 | 131 | Lend Finance PLC |

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

Add Product Edit Product Delete Product Print Products

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

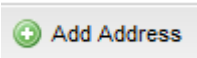
Quick Search: Part Number Search Clear





10 Page 1 of 235 Displaying 1 to 10 of 2349 items

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;

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)
Alerts (86)

[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;

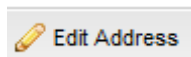
| Addresses | | | | |
|---|-----------------|-----------------------|-----------|--------------|
|  Add Address  Edit Address  Set As Main  Delete Address | | | | |
| ID | Name | Address | Post Code | Telephone |
| 80 | Lake View Drive | Sherwood Park, Nottin | NG15 0DT | 01302 245310 |
| 125 | Manor 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



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

| | |
|----------------|---------------------------------|
| 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

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

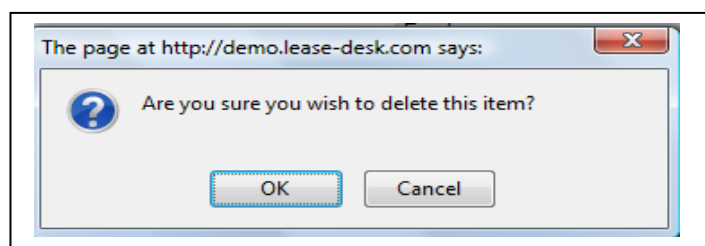
3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;

| Addresses | | | | |
|--|------------------------|-----------------------|-----------|--------------|
| <div> + Add Address ✎ Edit Address 🏠 Set As Main ✖ Delete Address </div> | | | | |
| ID | Name | Address | Post Code | Telephone |
| 80 | Lake View Drive | Sherwood Park, Nottin | NG15 0DT | 01302 245310 |
| 125 | Manor Farm | Harwell, Doncaster | DN10 5BU | 01302 245315 |

3.1.4. Deleting an Address:

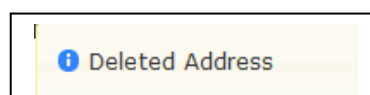
1. To delete an address from your Company Details, highlight the required address (as indicated previously) and click ✖ Delete Address

2. You will then receive the following message;



3. Click OK to delete (or Cancel to cancel the action).

4. Once you have confirmed deletion is required you will be presented with the following message and taken back to the Edit Company Details screen;

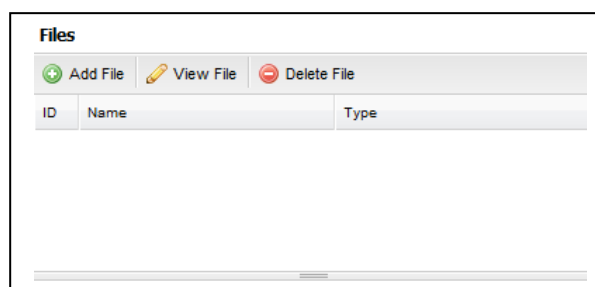


3.2. Adding, Viewing, and Deleting Files:

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

3.2.1. Adding a File:

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



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

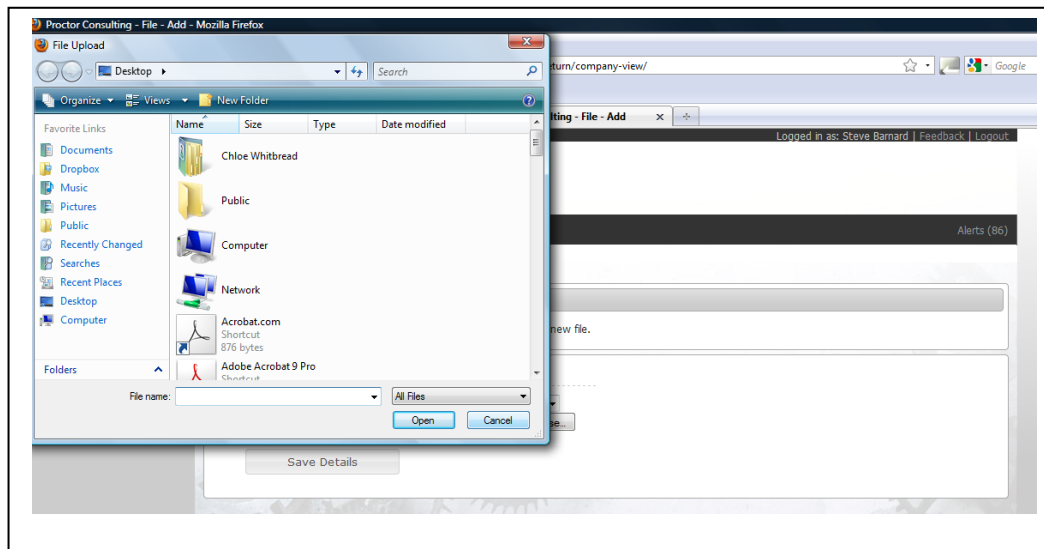


3. You will then be presented with the 'Add a New File' screen as indicated below;

A screenshot of the 'Add a New File' screen in the LEASE-DESK.COM application. The page has a header with the company logo and navigation links. Below the header, there is a 'back' button. The main content area is titled 'Add a New File' and contains instructions: 'Select Type from the drop down menu and browse to locate and add a new file.' There is a form with a 'Type' dropdown menu (currently showing 'File') and a 'Please Select' dropdown menu. A 'Browse...' button is next to the 'Please Select' dropdown. At the bottom of the form 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:

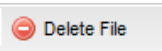
1. To view an existing file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

2. Click  View File

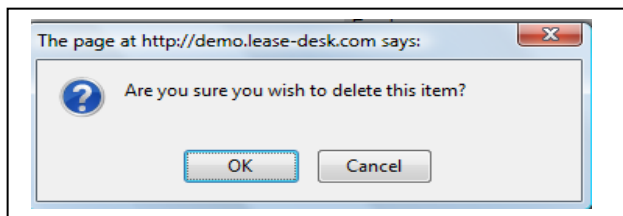
3.2.3. Deleting a File:

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

2. Click



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



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

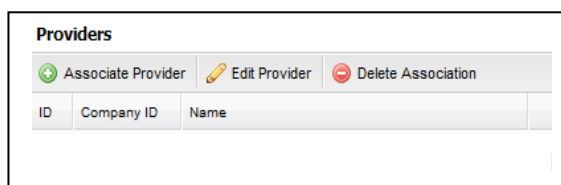
5. You are then taken back to the Edit Company Details screen where you will receive the following confirmation message;

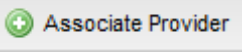


3.3. Providers: Associating and Deleting Association:

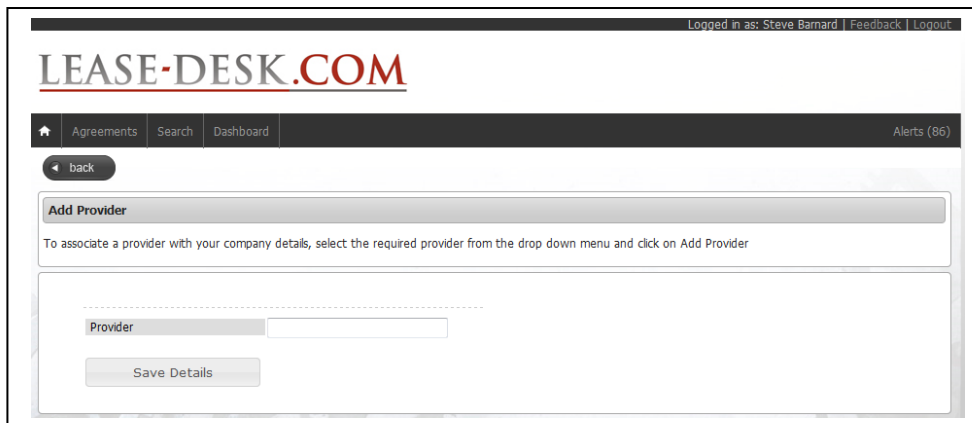
3.3.1. Associating a Provider (Vendor Only):

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

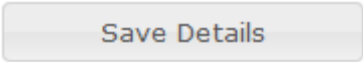


2. Click 

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



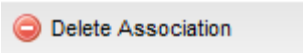
4. Select a Provider from the drop down menu and click



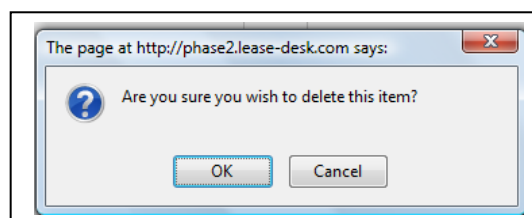
5. You will then be taken back to your homepage.

3.3.2. Deleting a Provider Association (Vendor Only):

1. To delete an associated Providers details, go to the Providers table, within the Edit Company Details screen as previously shown and highlight the required Provider.

2. Click 

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

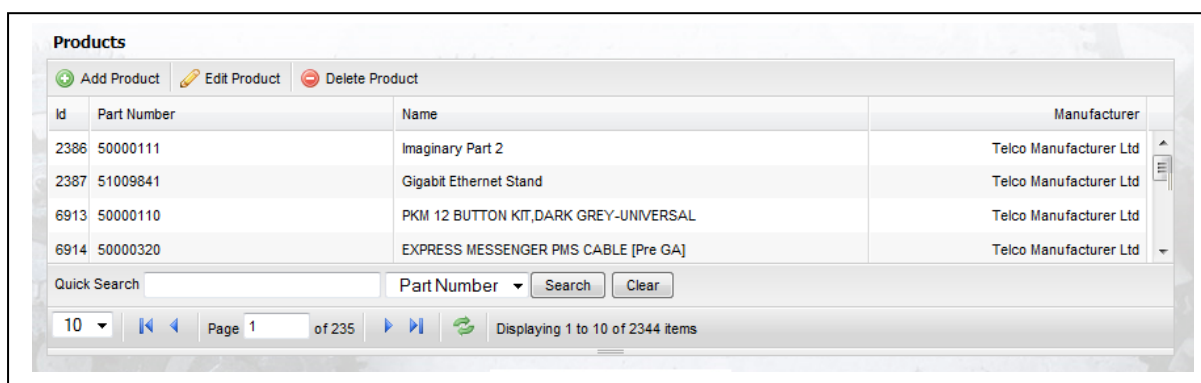


4. You will then be taken back to your home screen.

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

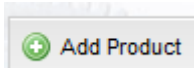
3.4.1 Adding a Product:

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

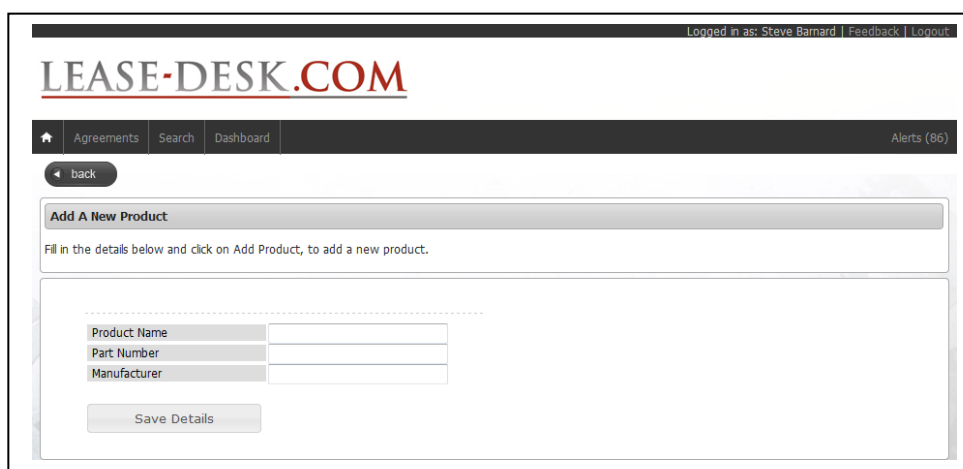


| Id | Part Number | Name | Manufacturer |
|------|-------------|---------------------------------------|------------------------|
| 2386 | 50000111 | Imaginary Part 2 | Telco Manufacturer Ltd |
| 2387 | 51009841 | Gigabit Ethernet Stand | Telco Manufacturer Ltd |
| 6913 | 50000110 | PKM 12 BUTTON KIT,DARK 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;



Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (86)

back

Add A New Product

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

Product Name

Part Number

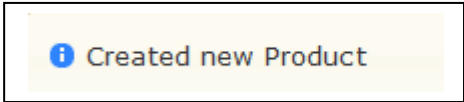
Manufacturer

Save Details

4. Fill in the details and click



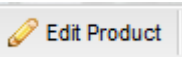
5. You will then be taken back to the main Company Details screen and receive the following confirmation;



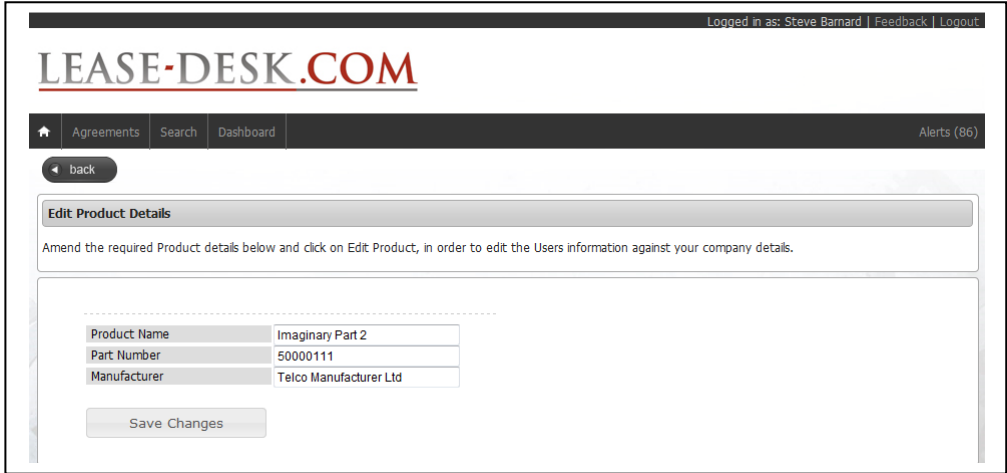
3.4.2 Editing a Product:

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



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



The screenshot shows the 'Edit Product Details' screen. At the top, it says 'Logged in as: Steve Barnard | Feedback | Logout'. Below the LEASE-DESK.COM logo is a navigation bar with 'Agreements', 'Search', and 'Dashboard'. On the right of the navigation bar is 'Alerts (86)'. Below the navigation bar is a 'back' button. The main heading is 'Edit Product Details'. Below this is a message: 'Amend the required Product details below and click on Edit Product, in order to edit the Users information against your company details.' Below the message is a table with three rows: 'Product Name' with value 'Imaginary Part 2', 'Part Number' with value '50000111', and 'Manufacturer' with value 'Telco Manufacturer Ltd'. Below the table is a 'Save Changes' button.

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;

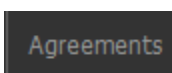


Note: You will be unable to delete a product if the chosen product is associated with one or more Agreements.

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).

Logged in as: Steve Bamard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (86)

back

Agreement List

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

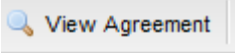
View Agreement View Log Summarise Notes

| ID | Identifier | Company | Status | Primary User | RBO Level | End Date |
|------|------------|----------------------|----------|-----------------|-----------|------------|
| 384 | 756-0384 | A-Z Taxi's Ltd | Dead | Janine Holler | 84343.71 | 10/03/2010 |
| 1039 | | A-Z Taxi's Ltd | Prospect | Ian Somerholder | 0.00 | |
| 311 | 1024 | ABC University | Prospect | John Ross | 0.00 | |
| 874 | IMTE018 | ABC University | Live | Neal Hutchinson | 6801.12 | 01/02/2013 |
| 398 | 756-0398 | Beacon Insurance Ltd | Live | Bob Sinclair | 13537.65 | 31/10/2010 |
| 157 | 000/011 | Beacon Insurance Ltd | Prospect | Bob Sinclair | 0.00 | |
| 895 | IMTE039 | Beta Healthcare Ltd | Prospect | Hannah Martin | 0.00 | |
| 950 | IMTE094 | Brent Design Ltd | Prospect | Robert Rogers | 0.00 | |

Quick Search Company Search Clear

10 Page 1 of 7 Displaying 1 to 10 of 65 items

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

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

5. You will then be presented with the full 'View Agreement Details' screen. This is indicated on the following page).

Customer Information:

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

Contract Terms:

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

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

End of Term:

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

Companies Information:

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

Financial Product Information:

This details the Financial Product information

Upgrade Options:

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

Product Information:

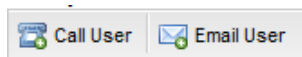
This lists the Product (s) within the agreement.

The screenshot displays a web-based lease agreement management system. The interface is divided into several sections:

- Customer:** Fields for Credit Limit (500.00), Credit Rating (55), and Analysis Date (05/02/2007).
- Contract Terms:** Fields for Internal Agreement Id (275), Agreement Identifier (CMW05), Payment Type (Arrears), Interest Rate (10.98%), Rate Per 1000 (21.73), Profile: Initial Payment (1), Profile: Regular Payment (59), Payment Frequency (Monthly), Initial Payment (5,432.50), Regular Payment (5,432.50), First Payment Date (30/11/2005), Status (Live), Prospect (None), and Expected Close Date.
- Upgrade Options:** Fields for RBO Level (222,972.64), Periods Left (5), Settlement (27,027.36), and Last Payment (30/10/2010).
- Companies:** A table listing companies associated with the agreement, including BDE Logistics Ltd, Bell Finance PLC, and Fourth Teloo Channel Ltd, with their respective primary contacts and roles.
- Financial Product:** Fields for Name (Minimum Period Rental Agreement), Notice (90), and Type (Finance Lease).
- Notes:** A section for adding, viewing, or summarizing notes.
- Files:** A section for adding or viewing files.
- Products:** A table listing products within the agreement, including JC Power Converter (NA) from Teloo Manufacturer Ltd.
- Audit Log:** A table showing the history of actions performed on the agreement, including views, updates, and alerts.

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

The screenshot shows the 'LEASE-DESK.COM' interface. At the top is a navigation bar with 'Agreements', 'Search', and 'Dashboard' tabs, and an 'Alerts (86)' indicator. Below the navigation bar is a 'back' button. The main heading is 'Add Call Note'. Below this is a sub-heading: 'Add a note by adding details to the message box and clicking on Save.' The form contains several input fields: 'Company Name' (A-Z Taxi's Ltd), 'User Name' (Ian Somerholder), 'Telephone Number' (0115 263 717), and a large 'Message' text area.

Save Details




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;

The screenshot shows the 'LEASE-DESK.COM' interface. At the top is a navigation bar with 'Agreements', 'Search', and 'Dashboard' tabs, and an 'Alerts (86)' indicator. Below the navigation bar is a 'back' button. The main heading is 'Add Email Note'. Below this is a sub-heading: 'Add a note by adding details to the message box and clicking on Save.' The form contains several input fields: 'Company Name' (Bell Finance PLC), 'User Name' (Rosie Phipps), 'Email' (rosie.phipps@lease-desk.com), 'Populate' (Blank), and a large 'Message' text area.

6. Select either 'Blank' or 'Agreement Details' from the 'Populate' dropdown list.
7. Enter the message and either click on 'Save', to save the message or 'Open in Email Client' to open up your email ready to send the message inputted.

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;

Logged in as: Renee Barnard | Feedback | Logout

LEASE-DESK.COM

Home | Agreements | Search | Dashboard | Alerts (80)

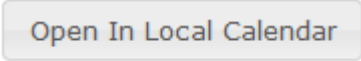
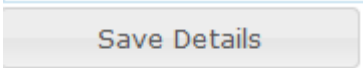
back

Add Calendar Note

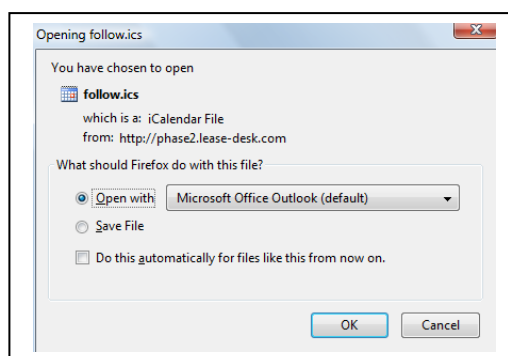
Add a note by adding details to the message box and clicking on Save.

| | |
|--------------|---|
| Company Name | Bell Finance PLC |
| User Name | Rosie Phipps |
| Subject | |
| Date | |
| Notes | Customer Name: A-Z Taxi's Ltd Agreement ID: 1039 Contact: Rosie Phipps Tel: 01244 673000 Email: rosie.phipps@lease-desk.com Link: https://phase2.lease-desk.com/agreement/view/1039/ |

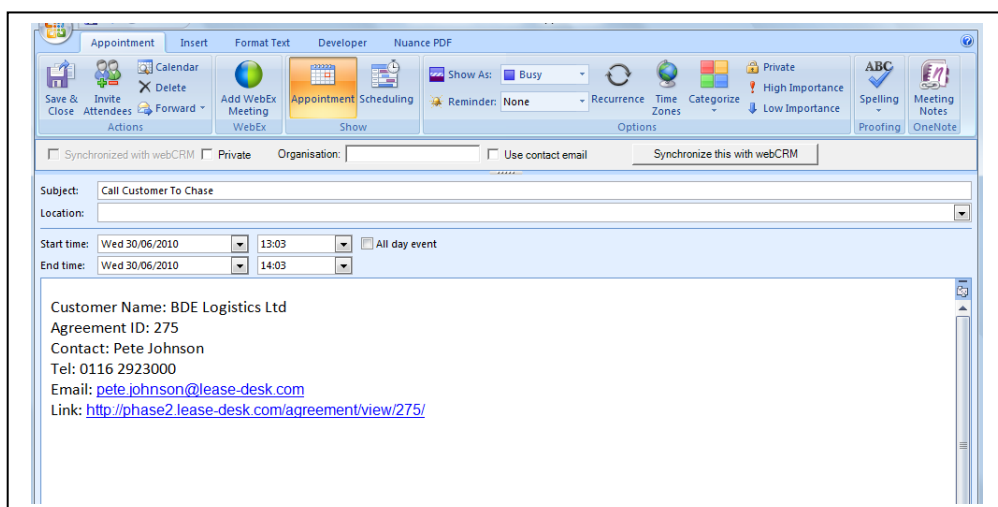
4. Enter a 'Subject' line and then click in the 'Date' box to bring up a calendar.
5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

6. Click  to open up your email and click  to save.

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

Add Note

Edit Note

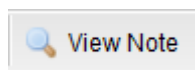
Delete Note

View Note

Summarise

| 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;

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.....

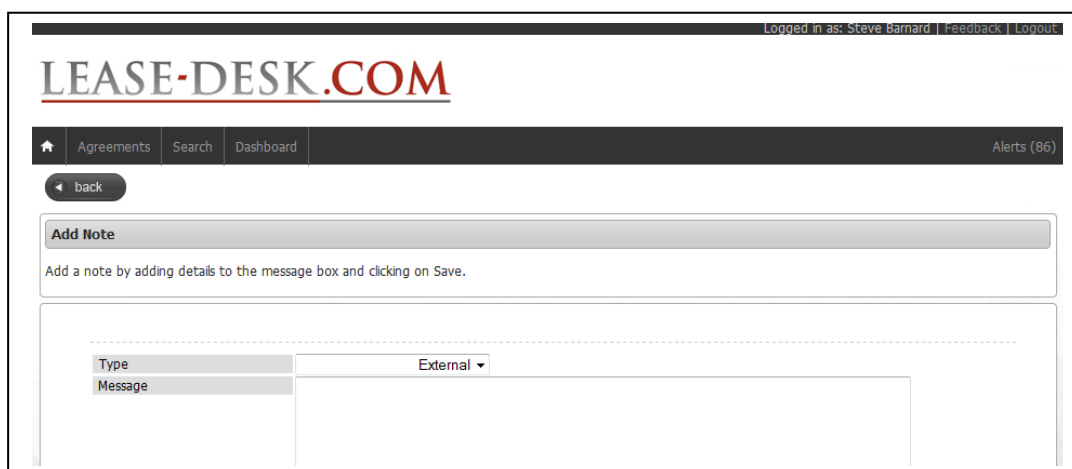
4.1.5 Adding a Note:

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;

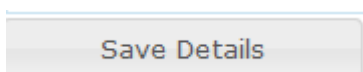
The screenshot shows the 'Add Note' screen in the LEASE-DESK.COM application. At the top, there is a header bar with the company name and a navigation menu. Below the header, there is a 'back' button. The main content area is titled 'Add Note' and contains a message box for adding details. There is a 'Type' dropdown menu with 'External' selected. Below the dropdown, there is a large text area for entering the message. At the bottom, there is a 'Save Details' button.

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

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

4. Type your message into the blank box

5. Click

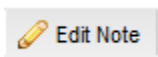


5. You will then be taken back to the main 'View Agreement' screen.

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;

The screenshot shows the 'Edit Note Details' screen. At the top, there is a navigation bar with 'Agreements', 'Search', and 'Dashboard' links, and an 'Alerts (87)' indicator. Below this is a 'back' button. The main heading is 'Edit Note Details'. A sub-heading reads: 'Amend a current note by editing details within the message box and clicking on Save.' Below this is a form with three fields: 'Username' (Steve Barnard), 'Type' (External), and 'Message' (Call customer back as soon as possible).

Save Changes

4. Amend the note as required and then click

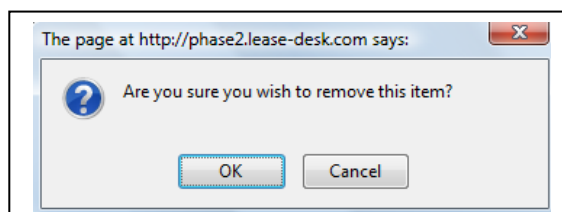
4.1.7 Deleting a Note:

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

2. Highlight the required note and click on

Delete Note

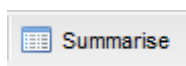
3. You will then be presented with the following confirmation message;



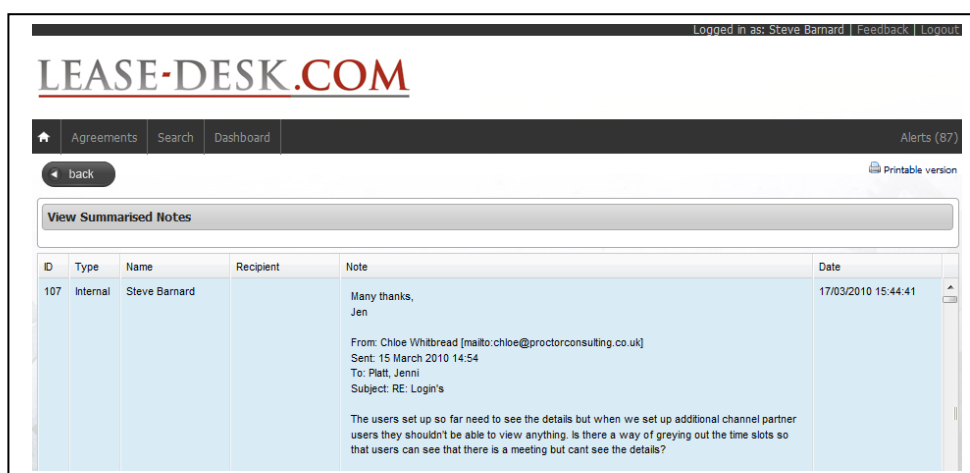
4. Select 'OK' to delete or 'Cancel' to cancel the request.

4.1.8 Summarising Notes:

1. 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;

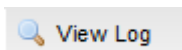


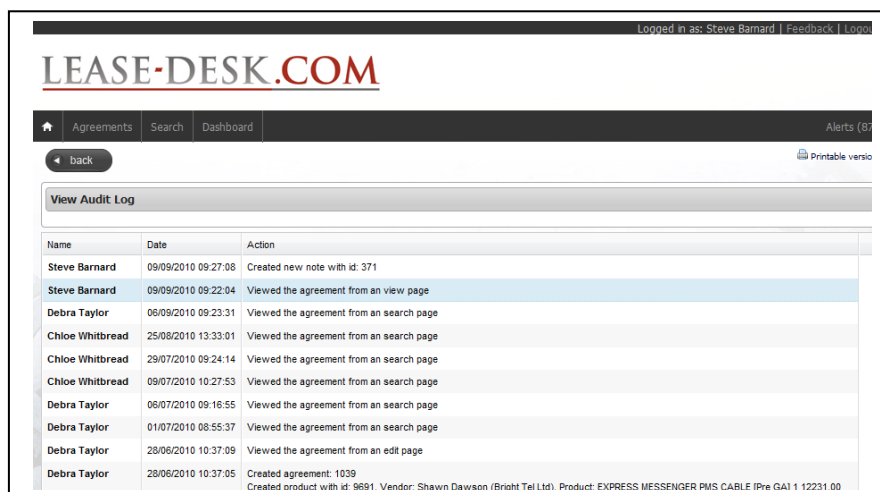
4.2. Viewing an Audit Log:

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

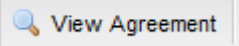
A) Either highlight the required Agreement from the main Agreement Lists screen as

indicated previously and then click to receive the following screen;





or

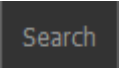
B) Select the Agreement required from the Agreement list and click  and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

| 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 |

- You will then be presented with the 'View Audit Log' screen which details all user actions against the selected Agreement, as detailed below;

Note: Either way will show you the same information. It 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;

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Home Agreements Search Dashboard Alerts (87)

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: Sep 2010 To: Sep 2010

Product

Product

Customer

Customer

Agreement

Months Left All

RBO Level All

Vendor

Customer Detail

Sic Code

Group

Group

Output Type

Report Default

Provider

Provider

Financial Product Name

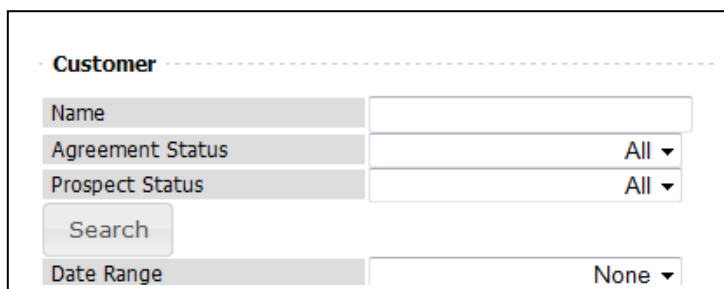
Financial

Financial Product Type All

- 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, in the box shown below.



Customer

Name

Agreement Status

Prospect Status

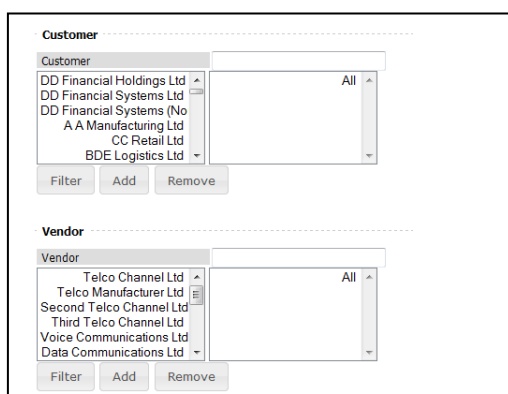
Date Range

- 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

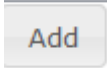
Customer

DD Financial Holdings Ltd
DD Financial Systems Ltd
DD Financial Systems (No
A A Manufacturing Ltd
CC Retail Ltd
BDE Logistics Ltd

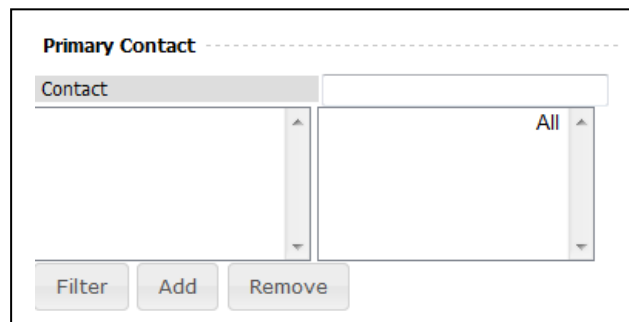
Vendor

Vendor

Telco Channel Ltd
Telco Manufacturer Ltd
Second Telco Channel Ltd
Third Telco Channel Ltd
Voice Communications Ltd
Data Communications Ltd

5. To include any of the produced data, within each table, in your search, 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;



Primary Contact

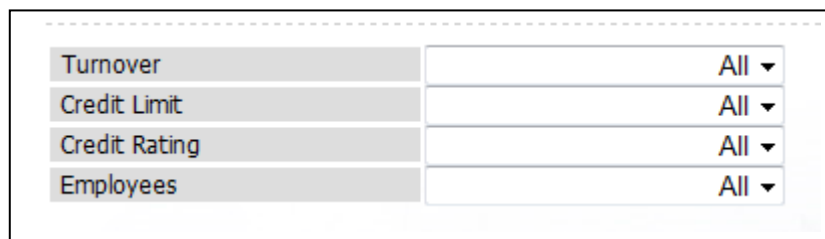
| Contact |
|---------|
| |

All

Filter Add Remove

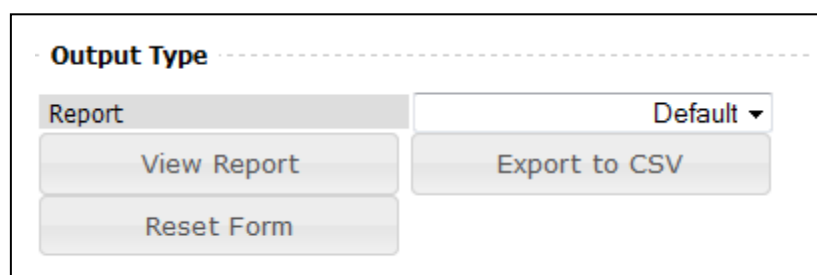
7. Carry on with each table required, following the previous step.

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



| | |
|---------------|-------|
| Turnover | All ▼ |
| Credit Limit | All ▼ |
| Credit Rating | All ▼ |
| Employees | All ▼ |

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



Output Type

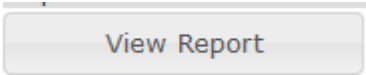
Report Default ▼

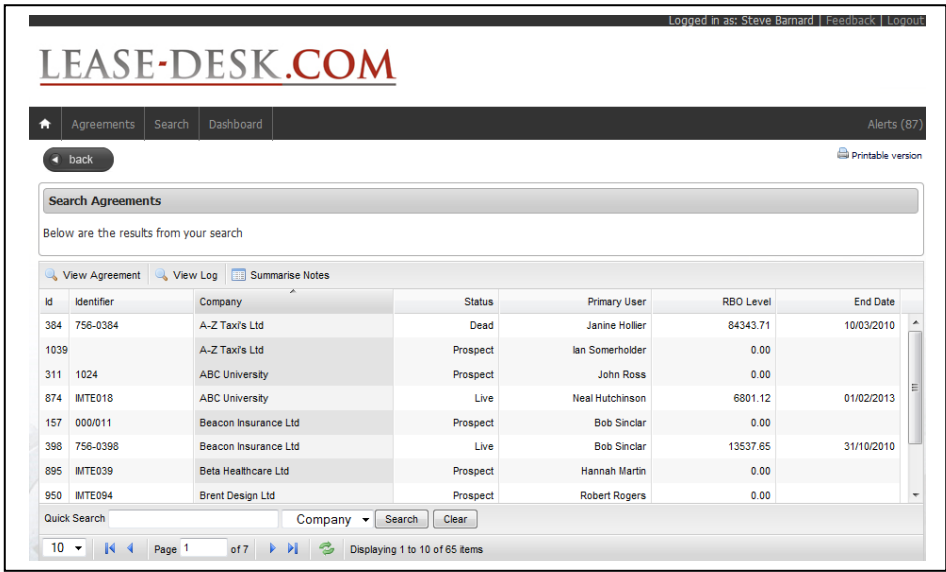
View Report Export to CSV

Reset Form

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

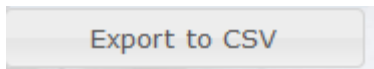
1. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.
2. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.
3. **Marketing Report (Full Details):** With all details 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.

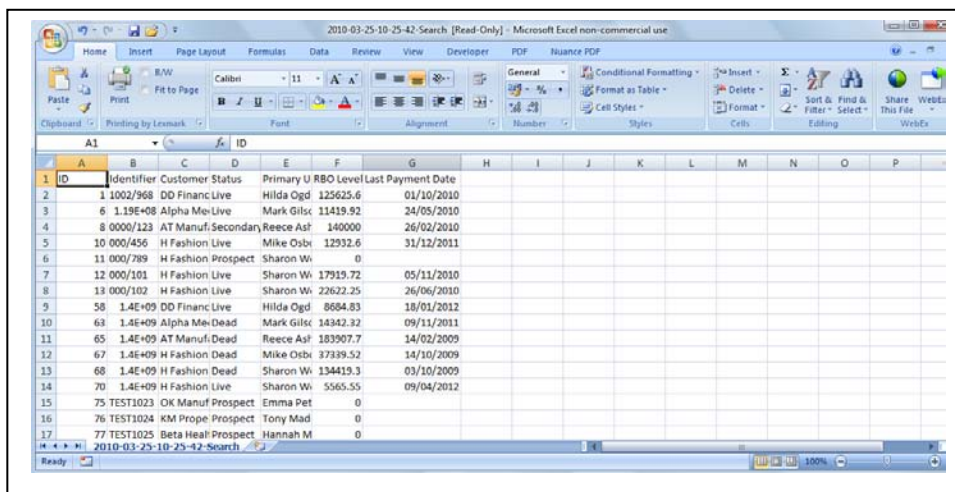
10. Once the report type has been selected, click on  to receive the following page;



The screenshot shows the LEASE-DESK.COM web application interface. At the top, there is a navigation bar with links for Home, Agreements, Search, and Dashboard. A user is logged in as Steve Barnard. Below the navigation bar, there is a search bar labeled 'Search Agreements' and a 'back' button. The search results are displayed in a table with columns: Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. The table contains 10 rows of data. Below the table, there is a 'Quick Search' section with a 'Company' dropdown and 'Search' and 'Clear' buttons. The page footer indicates 'Page 1 of 7' and 'Displaying 1 to 10 of 65 items'.

| Id | Identifier | Company | Status | Primary User | RBO Level | End Date |
|------|------------|----------------------|----------|-----------------|-----------|------------|
| 384 | 756-0384 | A-Z Taxi's Ltd | Dead | Janine Holler | 84343.71 | 10/03/2010 |
| 1039 | | A-Z Taxi's Ltd | Prospect | Ian Somerholder | 0.00 | |
| 311 | 1024 | ABC University | Prospect | John Ross | 0.00 | |
| 874 | IMTE018 | ABC University | Live | Neal Hutchinson | 6801.12 | 01/02/2013 |
| 157 | 000/011 | Beacon Insurance Ltd | Prospect | Bob Sinclair | 0.00 | |
| 398 | 756-0398 | Beacon Insurance Ltd | Live | Bob Sinclair | 13537.65 | 31/10/2010 |
| 895 | IMTE039 | Beta Healthcare Ltd | Prospect | Hannah Martin | 0.00 | |
| 950 | IMTE094 | Brent Design Ltd | Prospect | Robert Rogers | 0.00 | |

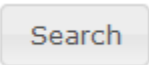
or  to view in CSV format as per the following page;



The screenshot shows an Excel spreadsheet with the following data:

| ID | Identifier | Customer | Status | Primary U | RBO Level | Last Payment Date |
|----|-------------|-----------|-----------|-----------|-----------|-------------------|
| 1 | 1 1002/968 | DD Financ | Live | Hilda Ogd | 125625.6 | 01/10/2010 |
| 2 | 6 1.19E+08 | Alpha Me | Live | Mark Gils | 11419.92 | 24/05/2010 |
| 3 | 8 0000/123 | AT Manuf | Secondary | Reece Asf | 140000 | 26/02/2010 |
| 4 | 10 000/456 | H Fashion | Live | Mike Osbi | 12932.6 | 31/12/2011 |
| 5 | 11 000/789 | H Fashion | Prospect | Sharon Wi | 0 | |
| 6 | 12 000/101 | H Fashion | Live | Sharon Wi | 17919.72 | 05/11/2010 |
| 7 | 13 000/102 | H Fashion | Live | Sharon Wi | 22622.25 | 26/06/2010 |
| 8 | 58 1.4E+09 | DD Financ | Live | Hilda Ogd | 8684.83 | 18/01/2012 |
| 9 | 63 1.4E+09 | Alpha Me | Dead | Mark Gils | 14342.32 | 09/11/2011 |
| 10 | 65 1.4E+09 | AT Manuf | Dead | Reece Asf | 183907.7 | 14/02/2009 |
| 11 | 67 1.4E+09 | H Fashion | Dead | Mike Osbi | 37339.52 | 14/10/2009 |
| 12 | 68 1.4E+09 | H Fashion | Dead | Sharon Wi | 134419.3 | 03/10/2009 |
| 13 | 70 1.4E+09 | H Fashion | Live | Sharon Wi | 5565.55 | 09/04/2012 |
| 14 | 75 TEST1023 | OK Manuf | Prospect | Emma Pet | 0 | |
| 15 | 76 TEST1024 | KM Prope | Prospect | Tony Mad | 0 | |
| 16 | 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:

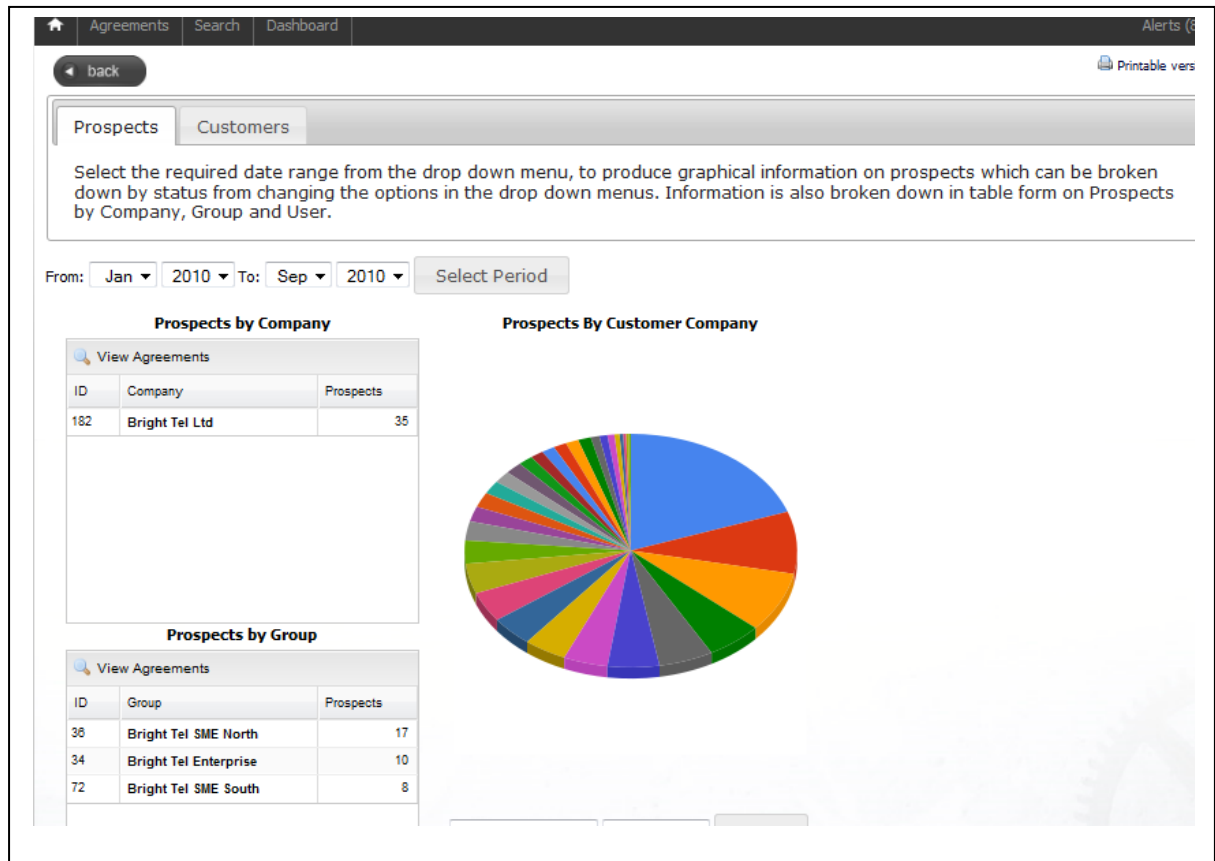
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

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  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

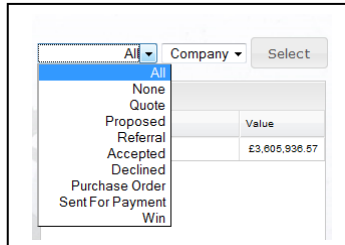
information and click

[View Agreements](#)

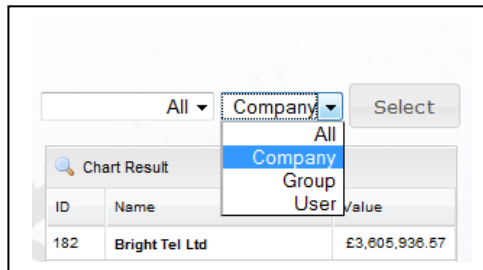
6. Alternatively, double click on the required line.

6.1.1 Viewing Top Prospect Information in Graphical Format:

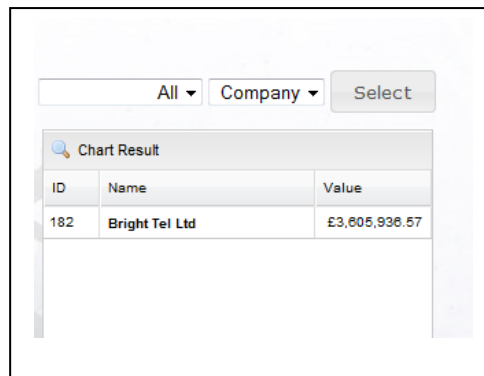
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



2. Select User, Group or Company from the second drop down menu box and click on the Select button.

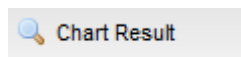


3. You will then be presented with the required information within the table below.



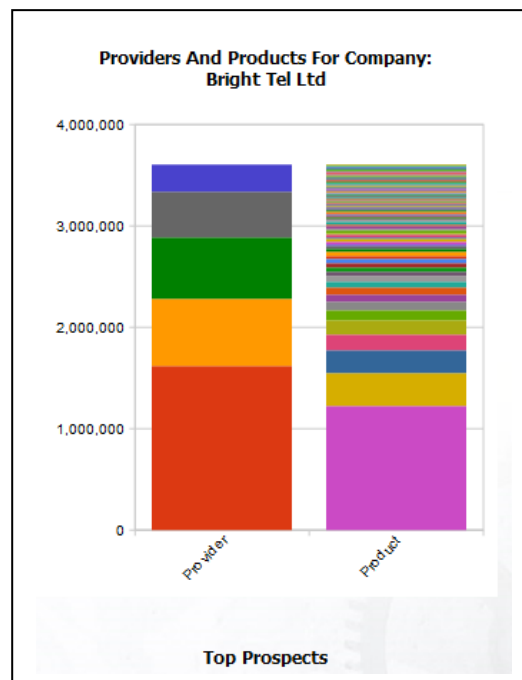
4. Highlight the individual line of information required.


5. To view the information in graphical format, click



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

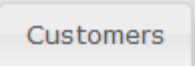
7. To see the legend, hover over the diagram with your mouse.



7. To View the Agreement information, highlight the line in the table below the graph and click  [View Agreement](#)

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

6.2. Customers:

1. Go to  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

back Printable ver

Prospects Customers

All live Portfolio information can be found on this page, broken down by different sections, e.g. Repeat Business Opportunity by Company etc and in graphical format. To change the Portfolio details shown on this page, select the required options from the drop down menus at the bottom of the page. Select an agreement and click on View Agreement to view details.

Repeat Business Opportunity by Company

View Agreements

| ID | Company | Value |
|-----|----------------|---------------|
| 182 | Bright Tel Ltd | £1,472,875.61 |

RBO By Company

Bright Tel Ltd
£1,472,875.61
100.0%

Agreements Nearing End Of Term

View Agreement

| ID | Company | RBO Value | Months Left |
|------|------------------------|-------------|-------------|
| 623 | The Taylor Tea Rooms L | £44,654.98 | |
| 398 | Beacon Insurance Ltd | £13,537.65 | |
| 555 | HL Training Services L | £37,246.58 | |
| 144 | Indigo Marketing Ltd | £179,260.00 | |
| 408 | Uniglow Retail Ltd | £127,394.52 | |
| 281 | SS Retail Ltd | £91,196.07 | |
| 599 | DD Retail Ltd | £32,646.18 | |
| 688 | The Taylor Tea Rooms L | £10,818.82 | |
| 1079 | PP Media Ltd | £382,161.54 | |
| 1044 | Sugar Vehicle Hire Ltd | £89,031.45 | |
| 161 | Lobbo Manufacturing L | £24,566.98 | |

View Portfolio

Repeat Business Opportunity by Group

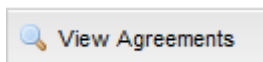
View Agreements

| ID | Group | Value |
|----|-----------------------|-------------|
| 36 | Bright Tel SME North | £992,300.68 |
| 72 | Bright Tel SME South | £245,104.61 |
| 34 | Bright Tel Enterprise | £235,470.32 |

Top Repeat Business Opportunities

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, there's a navigation bar with 'Agreements', 'Search', and 'Dashboard' tabs, and an 'Alerts (67)' button. Below this is a 'Repeat Business Opportunity by Company' section. It includes a 'back' button and a 'Printable version' link. The main content area shows search results with a table of data. Above the table are buttons for 'View Agreement', 'View Log', and 'Summarise Notes'. The table has columns for Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. Below the table is a 'Quick Search' section with a 'Company' dropdown, a 'Search' button, and a 'Clear' button.

| Id | Identifier | Company | Status | Primary User | RBO Level | End Date |
|-----|------------|---------------------------|--------|-----------------|-----------|------------|
| 874 | IMTE018 | ABC University | Live | Neal Hutchinson | 6801.12 | 01/02/2013 |
| 398 | 756-0398 | Beacon Insurance Ltd | Live | Bob Sinclair | 13537.65 | 31/10/2010 |
| 966 | IMTE800 | DD Financial Holdings Ltd | Live | Harold Bishop | 13843.79 | 01/10/2012 |
| 884 | IMTE028 | DD Financial Systems Ltd | Live | Roy Evans | 86155.98 | 01/10/2011 |
| 599 | Live09 | DD Retail Ltd | Live | Chris Wilson | 32646.18 | 01/06/2011 |
| 123 | NTD036 | Exel Media Ltd | Live | Darren Emmerson | 32627.92 | 01/07/2012 |
| 610 | Live14 | ExtraScope IT Ltd | Live | Erick Morillo | 11818.22 | 01/10/2011 |
| 700 | Live27 | Five Star Travel Ltd | Live | Paul Oakenfold | 10912.90 | 01/02/2012 |

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 title 'View Portfolio'. Below the title are two dropdown menus: 'All' and 'Please Select', each with a 'Select' button. Below these is a 'Display Graph' button. At the bottom is a table with three columns: ID, Name, and Value. The table contains one row with the following data:

| ID | Name | Value |
|-----|----------------|---------------|
| 182 | Bright Tel Ltd | £1,472,875.61 |

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

3. Click

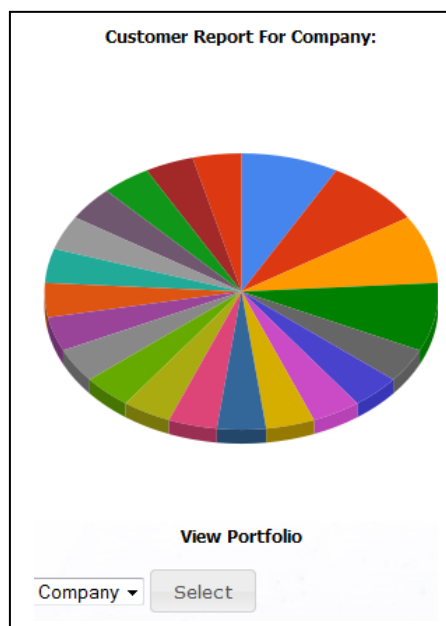
4. The information will then be presented in table format below.

5. Next select the Agreement grouping from the drop down menu, as indicated on the next page;

6. Highlight the required row from the table and click

Display Graph

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 a reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through 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 (87)** from the top menu.

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

Logged in as: Steve Barnard | Feedback | Log

LEASE-DESK.COM

Agreements Search Dashboard Alerts (87)

back Printable ver

My Alerts

A full list of pending alerts requiring user action.

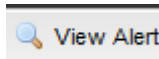
View Alert Forward Alert Completed Alert

| ID | Recipient | Company | Groups | Message | Time |
|------|--------------|----------------|--|--|---------------------|
| 3570 | Neil Pollock | Bright Tel Ltd | Bright Tel Enterprise Corrine Taylor Telco Man SMB South | Agreement changed Customer Name: Gaga Communications Ltd Agreement ID: 1089 Agreement Identifier (External): BGT015 Prospect Status: Proposed Agreement RBO Value: 0.00 Customer RBO Value: 113621.95 Link: http://phase2.lease-desk.com/agreement/view/1089/ Update from Debra Taylor on 12/07/2010 11:46:05: Field: Expected Close Date was updated, previously read: 2010- | 12/07/2010 11:46:05 |
| 3569 | Neil Pollock | Bright Tel Ltd | Bright Tel Enterprise | Agreement changed | 12/07/2010 11:46:05 |

Quick Search Recipient Search Clear

10 Page 1 of 9 Displaying 1 to 10 of 87 items

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



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

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (87)

back

View Alert

next

Recipient: Neil Pollock

Subject: Agreement Changed

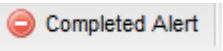
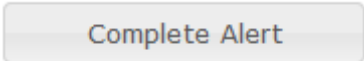
Message: Agreement changed
Customer Name: Gaga Communications Ltd
Agreement ID: 1089
Agreement Identifier (External): BGT015
Prospect Status: Proposed
Agreement RBO Value: 0.00
Customer RBO Value: 113621.95
Link: <http://phase2.lease-desk.com/agreement/view/1089/>

Update from Debra Taylor on 12/07/2010 11:46:05:
Field: Expected Close Date was updated, previously read:

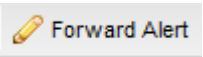
Time: 12/07/2010 11:46:05

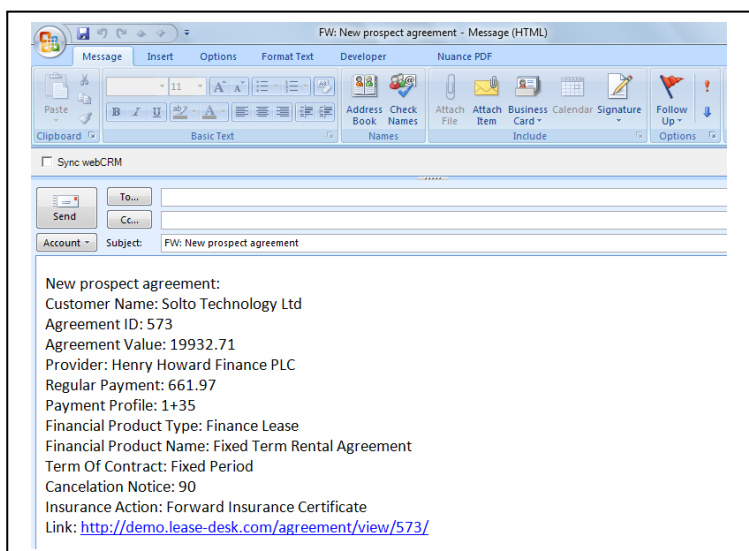
Complete Alert

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 the following page;

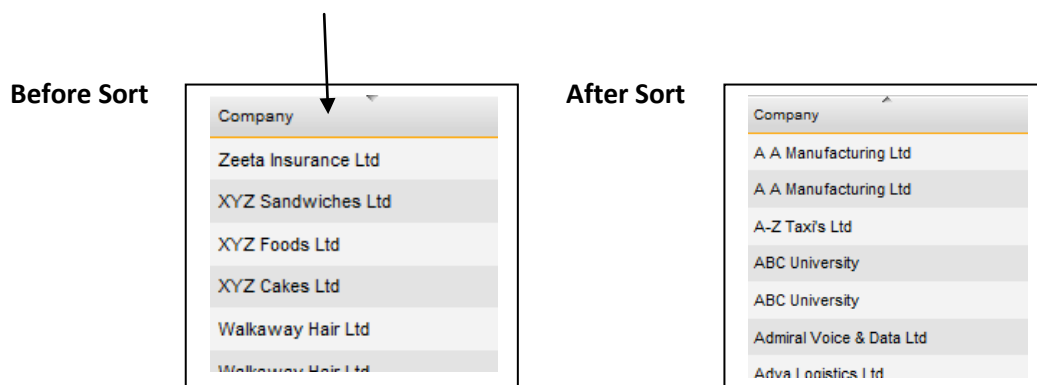


8. General Functionality:

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.

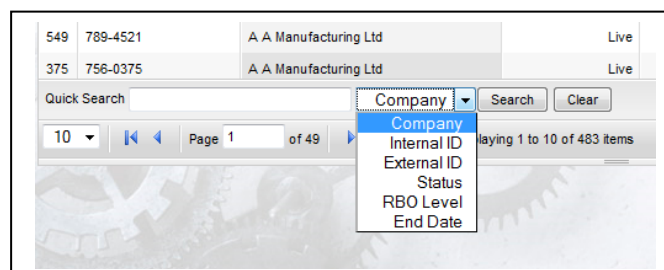
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.



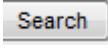
8.2 Quick Search:

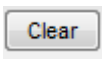
There is a 'Quick Search' functionality available within the majority of the main tables (Companies, Users, Groups etc), allowing easy access to the required information. You will find the 'Quick Search' function at the bottom of the tables noted above.

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




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

3. Click  to search for the information





4. Click  to start from the beginning.

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

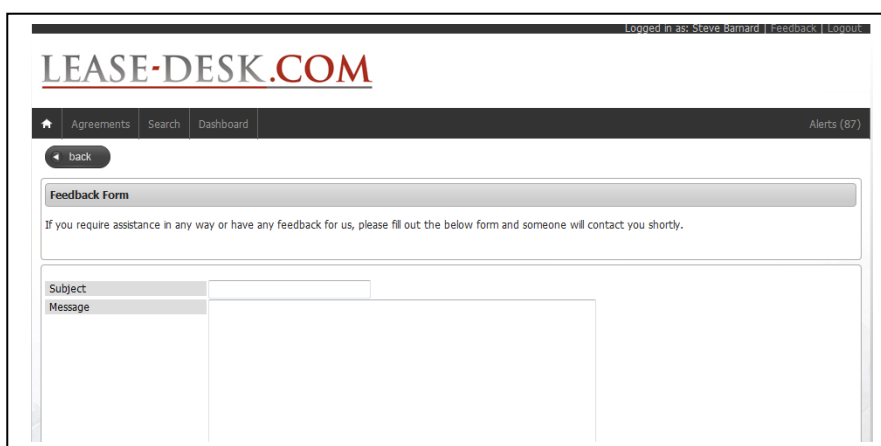
8.5 Changing the amount of records per view:

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.

Send Feedback

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 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?

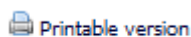
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

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