

LEASE-DESK

Super User Manual

Version 2.1



Table of Contents

1. An Introduction to Lease-Desk:.....	5
2. Logging into Lease-Desk:.....	6
3. Home Screen: Adding, Editing, Viewing & Deleting.....	7
3.1. Adding, Editing, Setting as Main, and Deleting Addresses:	7
3.1.1. Adding an Address:	7
3.1.2. Editing an Address:	8
3.1.3. Setting an Address as Main:.....	9
3.1.4. Deleting an Address:	10
3.2. Adding, Viewing, and Deleting Files:.....	11
3.2.1. Adding a File:.....	11
3.2.2. Viewing a File:	12
3.2.3. Deleting a File:.....	13
3.3. Providers: Associating, Editing, and Deleting Association:	13
3.3.1. Associating a Provider (Vendor Only):	13
3.3.2. Editing a Provider (Vendor Only):	14
3.3.2. Deleting a Provider Association (Vendor Only):	15
3.4. Adding, Editing and Deleting Users:.....	15
3.4.1. Adding a User:.....	15
3.4.2. Editing a User:	17
3.4.3 Deleting a User:.....	17
3.5. Adding, Editing and Deleting Products (Vendor Only):.....	18
3.5.1 Adding a Product:.....	18
3.5.2 Editing a Product:.....	19
3.5.3 Deleting a Product:	20
3.6. Adding, Editing and Deleting Financial Products (Financial Provider Only):.....	21
3.6.1 Adding a Financial Product:	21
3.6.2 Editing a Financial Product (Financial Provider Only):	23
3.6.3 Deleting a Financial Product (Financial Provider Only):.....	24
4. Companies Screen: Adding, Editing, Viewing & Deleting	25
4.1. Adding a Company:	25

4.2. Editing a Company:	28
4.3. Deleting a Company:	29
4.4. Viewing a Company:	30
5. Users Screen: Adding, Editing, Viewing & Deleting	30
5.1. Adding a User:	30
5.2. Editing a User:	31
5.3. Deleting a User:	31
5.4. Viewing a User:	31
6. Group Screen: Adding, Editing, Viewing, Deleting & Editing Members	32
6.1. Adding a Group:	32
6.2. Editing a Group:	33
6.3. Deleting a Group:	34
6.4. Viewing a Group:	34
6.5. Editing Members:	35
7. Financial Products Screen: Adding, Editing, Viewing & Deleting	37
7.1. Adding a Financial Product:	37
7.2. Editing a Financial Product:	38
7.3. Deleting a Financial Product:	39
7.4. Viewing a Financial Product:	39
8. Agreements Screen: Adding, Editing, Viewing, Deleting and Viewing Audit Log	40
8.1. Adding an Agreement (Live):	40
8.2. Adding an Agreement (Prospect):	45
8.3. Proposal Automation:	46
8.4. Editing an Agreement (Live or Prospect):	48
8.4.1 Editing a Vendor:	49
8.4.2 Updating Primary Vendor:	49
8.4.3 Calling or Emailing a Primary Contact:	50
8.4.4 Creating Follow Ups	51
8.4.5 Adding, Viewing and Deleting a File:	53
8.4.6 Viewing a Note:	53
8.4.7 Adding a Note:	54

8.4.8 Editing a Note.....	55
8.4.9 Deleting a Note.....	56
8.4.10 Summarising Notes.....	57
8.4.11 Viewing an Audit Log:	57
8.3.12 Adding and Deleting a Product:	58
8.5. Deleting an Agreement:.....	59
8.6. Viewing an Agreement:.....	59
9.0. Imports.....	61
9.1. Using an Existing Import:	66
10. Search:.....	67
10.1. Searching for Specific Customer Agreement Information:.....	69
10.2. Searching for all Customer Agreement Information:	72
11. Dashboard:.....	75
11.1. Prospects:.....	75
11.1.1 Viewing Top Prospect Information in Graphical Format:	76
11.2. Customers:	78
11.2.1 Viewing/Amending Portfolio Information:	79
12. Alerts:	81
13. General Functionality:	84
13.1. Sort:	84
13.2 Quick Search:	85
13.3 Refresh:	85
13.4 Scrolling through records:	85
13.5 Changing the amount of records per view:	86
13.6 Last 10 Records:.....	86
15. Contact Details:	88

1. An Introduction to Lease-Desk:

Lease-Desk is a Portfolio Management System designed specifically by Proctor Consulting, which provides a dedicated platform for Technology Vendors to view and manage all current and pending Customer Leasing Agreements in one place, highlighting valuable RBO opportunities from the existing base, helping to retain customers and increase revenue.

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

Once the existing Vendor client data has been uploaded by the Administrator(s), assigned Vendor users are able to Search, View, Edit, and Add depending on their hierarchy status, making it easy to access current and pending agreements, and check on pending agreement process. Lease-Desk's Dashboard functionality means Managers can view an instant snapshot of their current and pending leasing business opportunities.

System generated email notifications are sent to relevant Individuals, Teams and Management relating to end of term actions so that no agreement action or repeat business opportunity is missed, helping to increase customer satisfaction by being able to continually offer support and advice and assist customer requirements both now and in the future.

The terminology for the different user types are determined below;

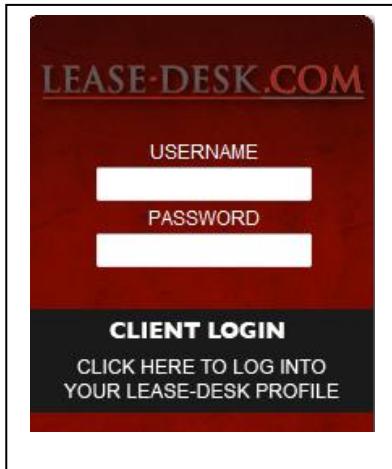
- **Normal:** Can only view their own agreements.
- **Main:** Can view all agreements related to their company.
- **Super:** Can view all agreements.

The terminology for the different group role types within Lease-Desk are defined below;

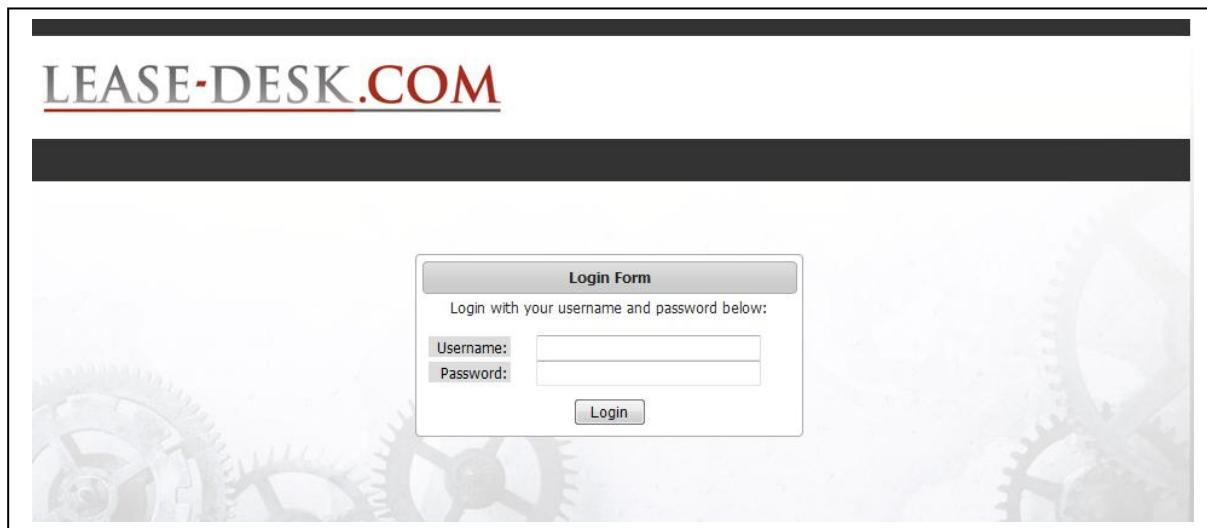
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the 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 **Login**
4. To Log Out, select 'Logout' from the top menu screen.

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

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

The screenshot shows the Lease-Desk.com home screen. At the top, there is a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1226). Below the navigation bar, a "Company Details" section displays a welcome message: "Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc." Under "Company Information", there is a table with fields for Name (Proctor Consulting Uk Limited), Company Type (Vendor), SIC Code (7222 OTHER SOFTWARE CON), Registration Number (6847795), Turnover, Employees, Credit Rating (52), Credit Limit (1,000.00), and Analysis Date (20/08/2009). Below this, there are two tables: "Addresses" and "Files". The "Addresses" table has columns for ID, Name, Address, Post Code, Telephone, and Buttons for Add Address, Edit Address, Set As Main, and Delete Address. It shows one entry: ID 80, Name Main Office, Address Lakeview Drive, She, Post Code NG15 0DT, Telephone 01302 245310. The "Files" table has columns for ID, Name, and Type, with one entry: ID 1, Name Company Import Dem.csv, Type Credit Report.

- 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:

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

The screenshot shows the "Addresses" table. It has columns for ID, Name, Address, Post Code, and Telephone. There is one entry: ID 80, Name Lake View Drive, Address Sherwood Park, Nottir, Post Code NG15 0DT, Telephone 01302 245310. Above the table, there is a button labeled "Add Address" with a green plus sign icon.

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

Logged in as: Chloe Whitbread | Feedback | Logout

LEASE-DESK.COM

Companies Users Groups Financial Products Agreements Imports Search Dashboard Alerts (1226)

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;



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, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

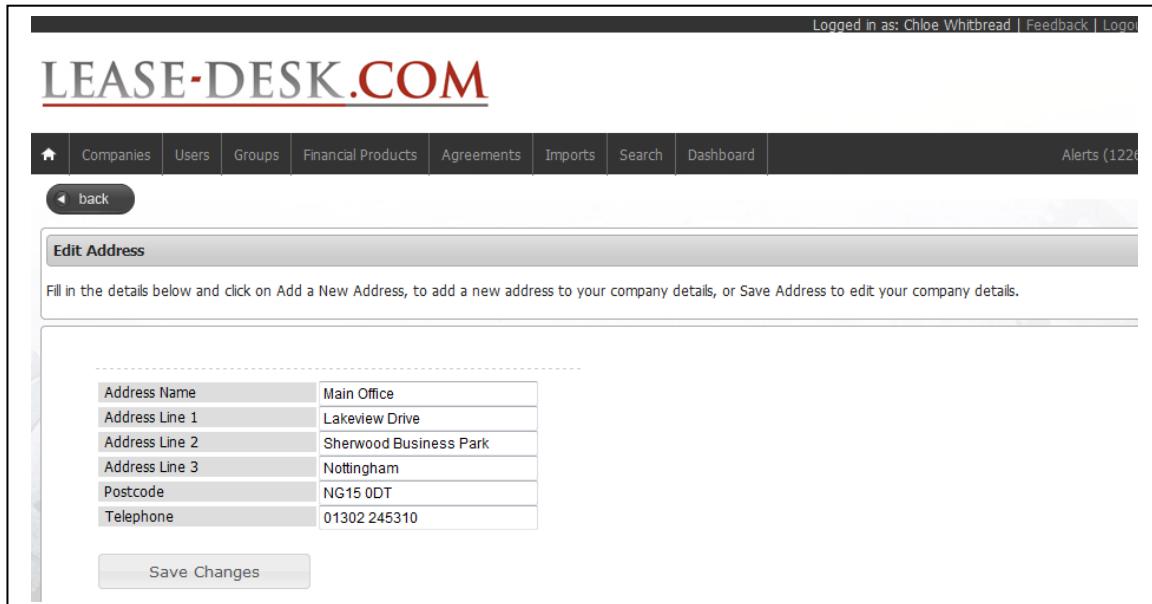
3.1.2. Editing an Address:

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, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

2. Click on  Edit Address

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



Logged in as: Chloe Whitbread | Feedback | Logo

Companies Users Groups Financial Products Agreements Imports Search Dashboard Alerts (1226)

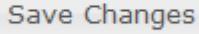
back

Edit Address

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

Address Name	Main Office
Address Line 1	Lakeview Drive
Address Line 2	Sherwood Business Park
Address Line 3	Nottingham
Postcode	NG15 0DT
Telephone	01302 245310

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.



3.1.3. Setting an Address as Main:

1. To set an address against your Company Details as the main site address, highlight the required address (as indicated previously) and click  Set As Main
2. You will then be presented with the following confirmation message;

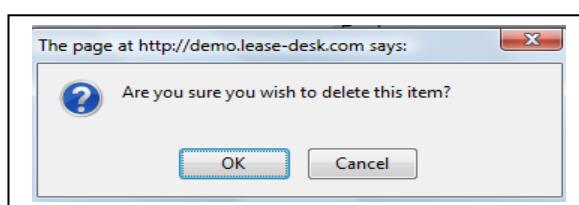


3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;

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

3.1.4. Deleting an Address:

1. To delete an address from your Company Details, highlight the required address (as indicated previously) and click  Delete Address
2. You will then receive the following message;



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



3.2. Adding, Viewing, and Deleting Files:

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

3.2.1. Adding a File:

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

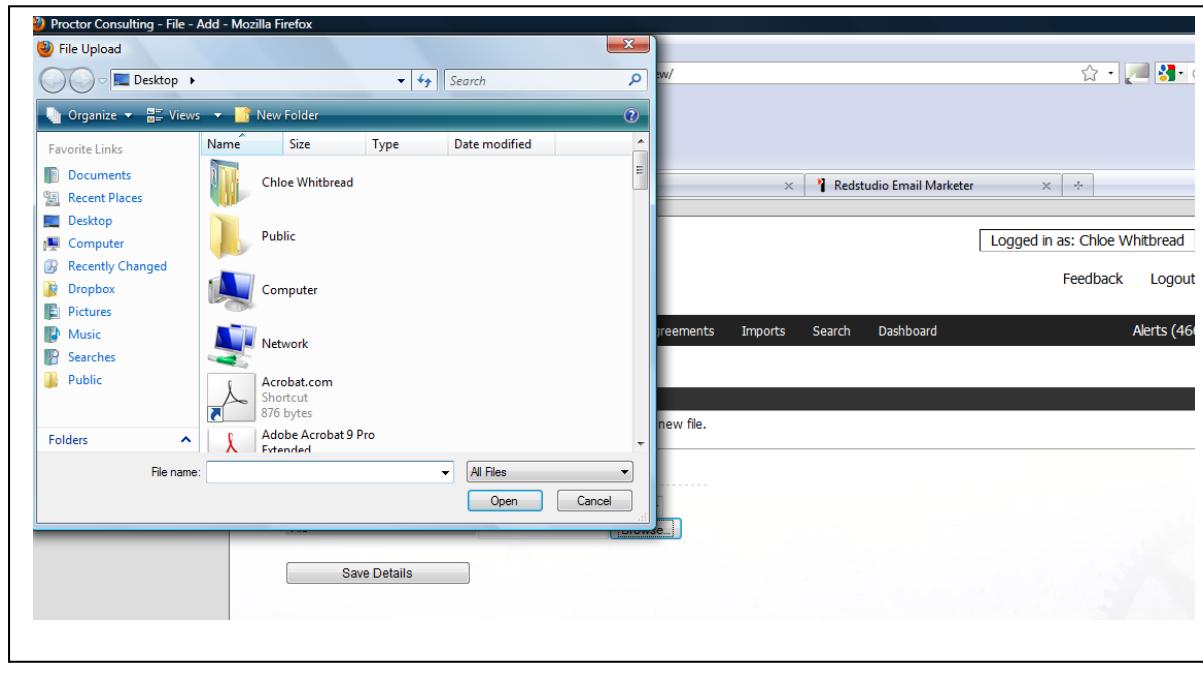
Files		
	Add File	View File
ID	Name	Type

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 a web application interface. At the top, there is a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1226). Below the navigation bar, the LEASE-DESK.COM logo is displayed. A sub-navigation bar shows a back link and other options. The main content area has a header "Add a New File". A message says "Select Type from the drop down menu and browse to locate and add a new file." Below this, there is a form with two input fields: "Type" (a dropdown menu currently showing "Please Select") and "File" (a file upload field with a "Browse..." button). 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:

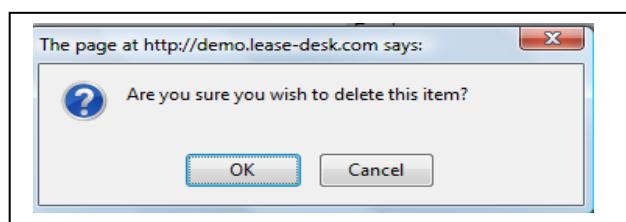
1. To view an existing file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

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



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

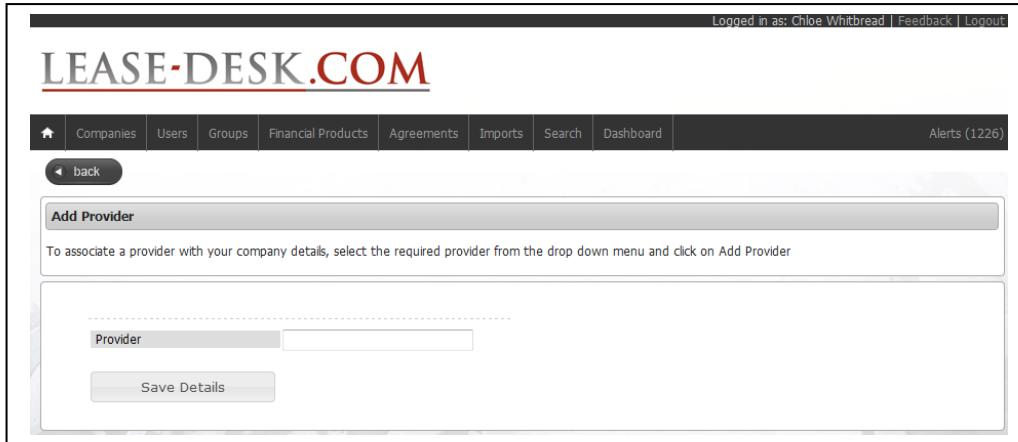
3.3.1. Associating a Provider (Vendor Only):

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

Providers		
 Associate Provider	 Edit Provider	 Delete Association
ID	Company ID	Name

2. Click  Associate Provider

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



4. Press space or shift and * to bring up a drop down list of the Providers (or type name if

known) menu and click  Save Details

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

3.3.2. Editing a Provider (Vendor Only):

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

2. Click  Edit Provider

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

3.3.2. Deleting a Provider Association (Vendor Only):

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

3.4. Adding, Editing and Deleting Users:

3.4.1. Adding a User:

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

Users				
	 Add User	 Edit User	 Delete User	
ID	User Name	Full Name	Job Title	Type
111	daniel@proctorconsulting.co.uk	Daniel Proctor	Director	Super
153	charlotte.rust@lease-desk.com	Charlotte Rust		Super
149	debra.taylor@lease-desk.com	Debra Taylor	Lease-Desk Administrator	Super
118	chloe.whitbread@lease-desk.com	Chloe Whitbread	Lease-Desk Product Manager	Super

2. Click  Add User
3. You will then be presented with the Add a New User screen as indicated below;

Add A New User

Fill in the details below and click on Save a New User, to add a new user to your company details. The role set determines the users Lease-Desk access rights.

- **Normal:** Can only view their own agreements.
- **Main:** Can view all agreements related to their company.
- **Super:** Can view all agreements.

Username (Email)	
First Name	
Last Name	
Job Title	
Mobile Phone	
DDI	
Company	Proctor Consulting UK Ltd
Address	

Email Alerts
Send Login
Role Please Select

Save Details

4. Fill in the full User Details, First Name, Last Name, etc. The Username, First and last name, Company, address and role are mandatory.

Note: The Company should auto populate to your Company, as you are adding a user to your Companies details. To bring up the address details either press space or start typing and a list will appear for you to select your entry.

In addition, the ‘send login details’ box will always default to be sent if you are a vendor or are adding a user to a vendor.

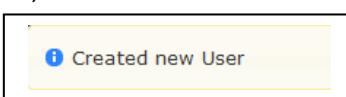
The Alerts tick box is for users that will be adding/viewing Agreement information and will need email alerts sent to them, for example Account/Sales Managers at a Vendor.

In addition, the Role type selected will determine what rights the user has, for example Super Users will have access to all areas with editing functionality, whilst Normal Users will only have access to their agreement and company information and limited editing rights.

Save Details

5. Click

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

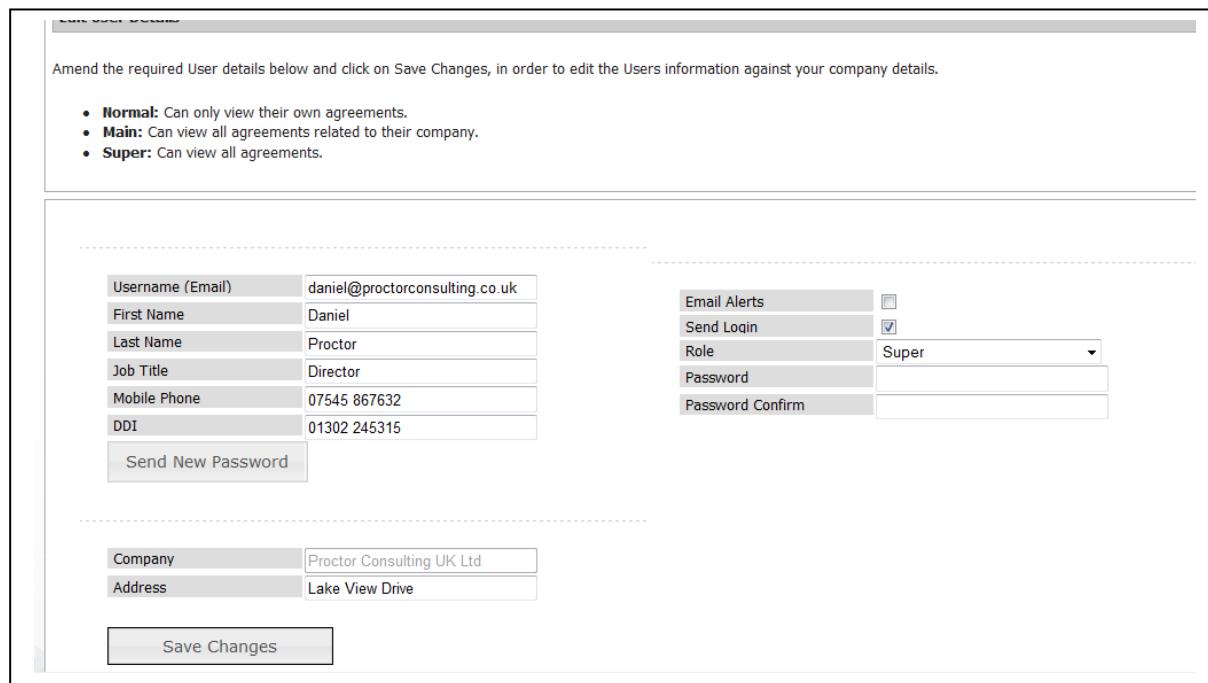


3.4.2. Editing a User:

1. To edit a User against your Company Details, go to the Users table, within the Edit Company Details screen as previously shown, and highlight the required user.

2. Click  Edit User

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



4. Amend the required details and click 

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



3.4.3 Deleting a User:

1. To delete a User against your Company Details, go to the Users table, within the Edit Company Details screen as previously shown, and highlight the required user.

2. Click  Delete User

3. You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;



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

3.5.1 Adding a Product:

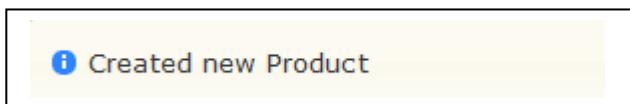
1. To add a Product to your Company Details, go to the main Products table within the homepage as indicated below;

2. Click  Add Product

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

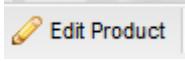
The screenshot shows the software's main navigation bar at the top with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. A red alert box on the right indicates 'Alerts (1)'. Below the navigation is a 'back' button. The main content area has a header 'Add A New Product' and a sub-instruction: 'Fill in the details below and click on Add Product, to add a new product.' There are three input fields: 'Product Name', 'Part Number', and 'Manufacturer', each with a corresponding text input box. At the bottom is a 'Save Details' button.

4. Fill in the details and click 
5. You will then be taken back to the main Company Details screen and receive the following confirmation;



3.5.2 Editing a Product:

1. To edit an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

2. Click 

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

Logged in as: Chloe Whitbread | Feedback | L

LEASE-DESK.COM

[Companies](#) [Users](#) [Groups](#) [Financial Products](#) [Agreements](#) [Imports](#) [Search](#) [Dashboard](#) [Alerts \(0\)](#)

[back](#)

Edit Product Details

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

Product Name	Spare 001
Part Number	123456
Manufacturer	Telco

[Save Changes](#)

4. Amend the required detail and then click **Save Changes**
5. You will then be taken back to the Company Details screen and will receive the following confirmation message;

Updated Product

3.5.3 Deleting a Product:

- 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. **(Note: You will be unable to delete a product that is associated with one or more Agreements).**
- Click
- You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.

4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;

 Deleted Product

3.6. Adding, Editing and Deleting Financial Products (Financial Provider Only):

3.6.1 Adding a Financial Product:

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

Financial Products List				
		Add Financial Product	Edit Financial Product	Delete Financial Product
ID	Type	Name	Cancelation Notice	Secondary Rental
8	Finance Lease	Minimum Period Rental Agreement	90	Yes
13	Operating Lease	RV Lease	30	Yes

2. Click  Add Financial Product

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

Logged in as: Chloe Whitbread | Feedback | [Logout](#)

LEASE-DESK.COM

Companies Users Groups Financial Products Agreements Imports Search Dashboard Alerts (0)

back

Add A New Financial Product

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

Provider Name		Target Sale Price	
Financial Product Type	Please Select ▾	Put Option	Please Select ▾
Financial Product Name		Put Option Cost	
Term Of Financial Product	Please Select ▾	Secondary Rental Split	Please Select ▾
Cancellation Notice	Please Select ▾	Secondary Rental Split Cost	
Secondary Rental	Please Select ▾	Insurance Required	Please Select ▾
Term End Action	Please Select ▾	Insurance Action	Please Select ▾
Save Details		Settlement Calculation	Please Select ▾
		Settlement Discount	Please Select ▾
		Upgrade Calculation	Please Select ▾
		Upgrade Discount	

4. Fill in the following Financial Product Details;

- **Provider Name:** (press space, shift and * or start typing to bring up the list of providers)
- **Financial Product Type:** (From the drop down menu)
- **Financial Product Name:** Enter the name of the Financial Product here
- **Term of Contract:** This should be specified by the Provider and will be fixed or minimum
- **Cancellation Notice:** (Whether there is any notice for the customer when cancelling)
- **Secondary Rentals:** (When the product offered within the lease agreement goes into secondary rentals following the end of the contract.)
- **Term End of Action:** (What happens at the end of the contract, i.e. the equipment goes to the customer)
- **Target Sales Price (If Applicable)**
- **Put Option:** From the drop down menu, either Yes or No and can be a value or percentage.
- **Put Option Cost:** This will be either a percentage or value and will be added to the settlement amount on all agreements where this Financial Product is used.
- **Secondary Rental Split:** This will be either Yes or No and can be a value or percentage.
- **Secondary Rental Split Cost:** This will be either a value or percentage.
- **Insurance Required:** (Whether there is an insurance clause within the Financial Product type which advises insurance evidence must be provided by the Vendor/Customer.)
- **Insurance Action:** Confirm in Writing, Provide Policy, Forward Insurance Certificate or None
- **Settlement Calculation** (This will be either Rule of 78 or Rental Stream)
- **Settlement Discount:** : i.e. 3% (normally specified in Financial Providers T's & C's)

- **Upgrade Calculation:** (This will be either Rule of 78 or Rental Stream)
- **Upgrade Discount:** i.e. 3% (normally specified in Financial Providers T's & C's)

Save Details

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

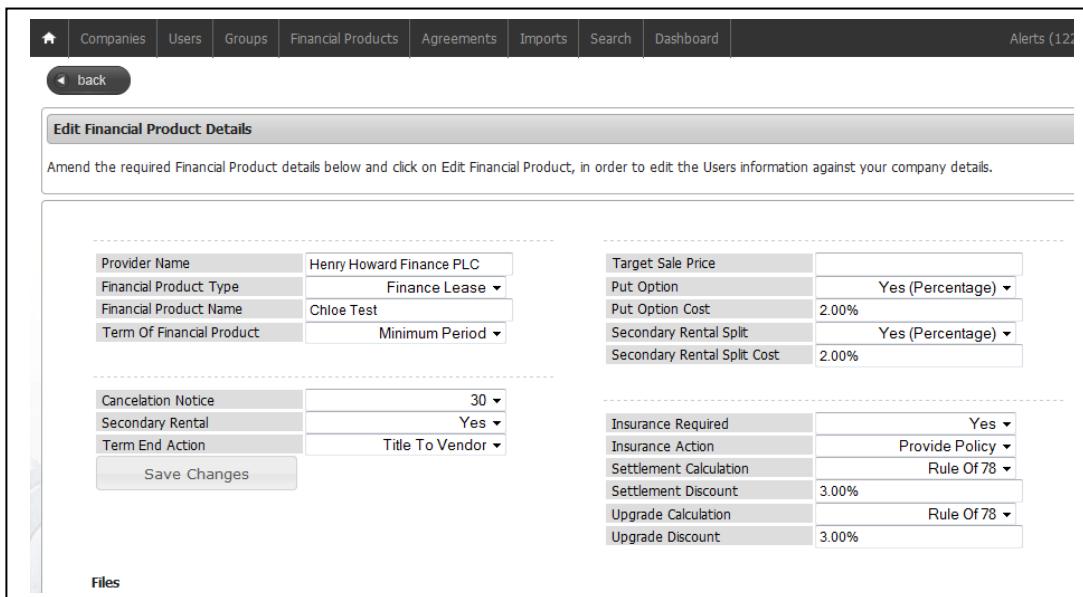
Created new Financial Product

3.6.2 Editing a Financial Product (Financial Provider Only):

1. To edit an existing Financial Product against your Company Details, go to the main Financial Products table within the homepage as indicated previously and highlight the required product from the list.

2. Click  **Edit Financial Product**

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



The screenshot displays the 'Edit Financial Product Details' interface. At the top, there is a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. A red alert box indicates 'Alerts (122)'. Below the navigation is a 'back' button. The main section is titled 'Edit Financial Product Details' and contains instructions: 'Amend the required Financial Product details below and click on Edit Financial Product, in order to edit the Users information against your company details.' The form is divided into several sections:

- Provider Name:** Henry Howard Finance PLC
- Financial Product Type:** Finance Lease
- Financial Product Name:** Chloe Test
- Term Of Financial Product:** Minimum Period
- Target Sale Price:** Yes (Percentage)
- Put Option:** 2.00%
- Secondary Rental Split:** Yes (Percentage)
- Secondary Rental Split Cost:** 2.00%
- Cancellation Notice:** 30
- Secondary Rental:** Yes
- Term End Action:** Title To Vendor
- Save Changes** button
- Insurance Required:** Yes
- Insurance Action:** Provide Policy
- Settlement Calculation:** Rule Of 78
- Settlement Discount:** 3.00%
- Upgrade Calculation:** Rule Of 78
- Upgrade Discount:** 3.00%
- Files** section

4. Amend the required details and click

 Save Changes

Note: You will be unable to amend the majority of details within the Financial Product once it has been set up on the system. If any amendments with the figures need to be changed a new Financial Product should be raised.

Note: You will see you can Add, View or Delete Files from this page as well. Follow the previous process in 5.2 on how to do this.

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

  Updated Financial Product

3.6.3 Deleting a Financial Product (Financial Provider Only):

1. To delete an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

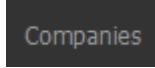
2. Click   Delete Financial Product

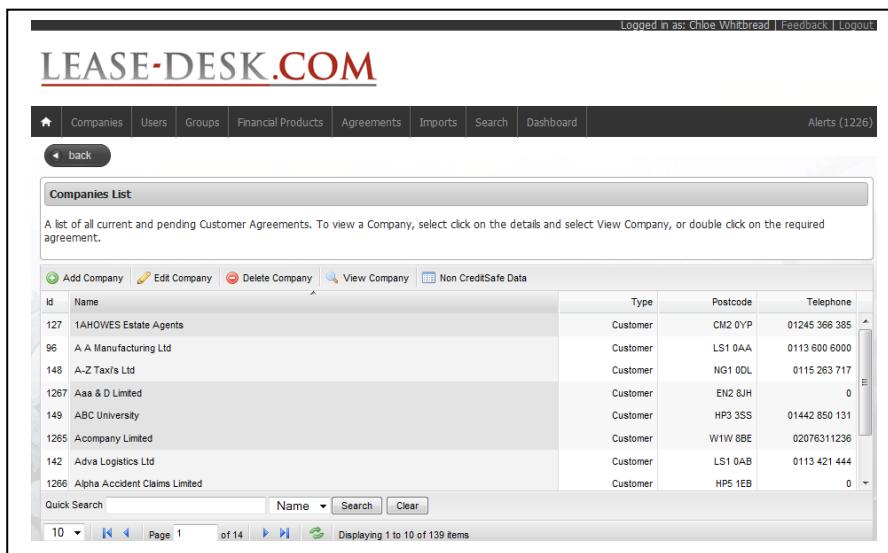
3. You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;

  Deleted Financial Product

4. Companies Screen: Adding, Editing, Viewing & Deleting

4.1. Adding a Company:

1. From the main menu select 
2. This will take you to the Companies List screen as indicated below;

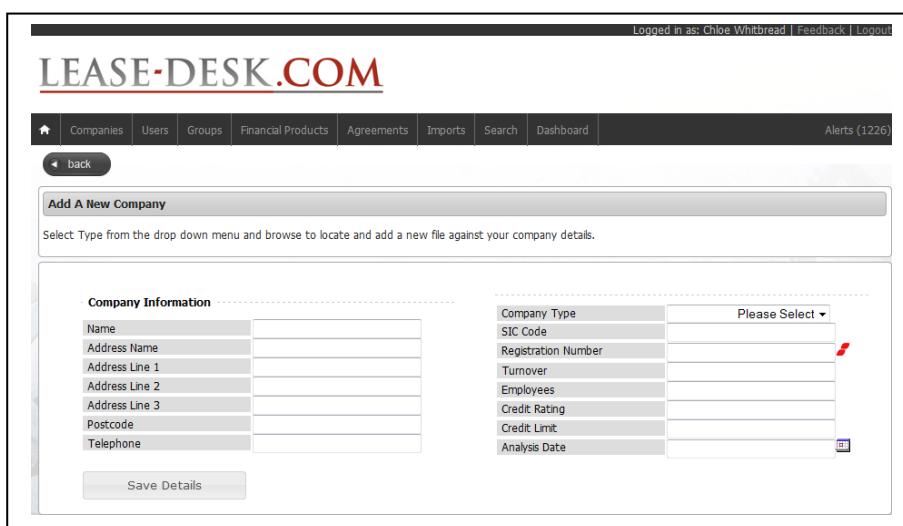


The screenshot shows the 'Companies List' screen. At the top, there's a navigation bar with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. To the right of the navigation bar, it says 'Logged in as: Chloe Whitbread | Feedback | Logout' and 'Alerts (1226)'. Below the navigation bar is a back button. The main area is titled 'Companies List' and contains a message: 'A list of all current and pending Customer Agreements. To view a Company, select click on the details and select View Company, or double click on the required agreement.' Below this message is a table with the following data:

ID	Name	Type	Postcode	Telephone
127	1AHOVES Estate Agents	Customer	CM2 0YP	01245 366 385
96	A A Manufacturing Ltd	Customer	LS1 0AA	0113 600 6000
148	A-Z Taxis Ltd	Customer	NG1 0DL	0115 263 717
1267	Aaa & D Limited	Customer	EN2 8JH	0
149	ABC University	Customer	HP3 3SS	01442 850 131
1265	Acconomy Limited	Customer	W1W 8BE	02076311236
142	Adva Logistics Ltd	Customer	LS1 0AB	0113 421 444
1266	Alpha Accident Claims Limited	Customer	HP5 1EB	0

At the bottom of the table, there are search fields for 'Quick Search' and 'Name', and buttons for 'Search' and 'Clear'. Below the table, it says 'Page 1 of 14' and 'Displaying 1 to 10 of 139 items'.

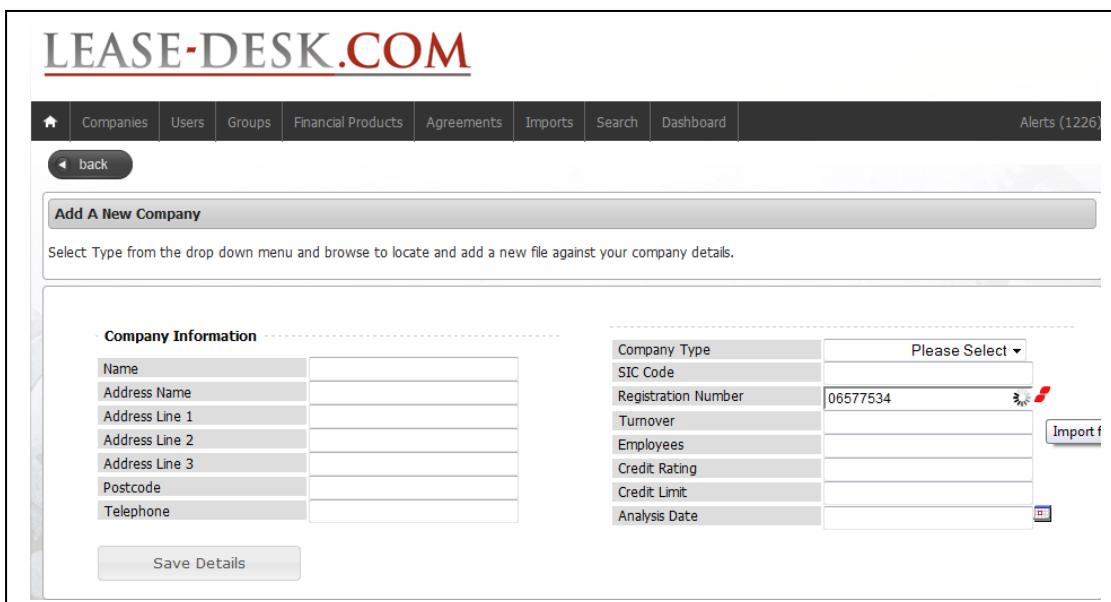
1. Click on 
2. You will then be presented with the 'Add a new Company Screen' as indicated below;



The screenshot shows the 'Add A New Company' screen. At the top, there's a navigation bar with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. To the right of the navigation bar, it says 'Logged in as: Chloe Whitbread | Feedback | Logout' and 'Alerts (1226)'. Below the navigation bar is a back button. The main area is titled 'Add A New Company' and contains a message: 'Select Type from the drop down menu and browse to locate and add a new file against your company details.' Below this message is a form with two sections: 'Company Information' and 'Company Details'.

Company Information		Company Details	
Name		Company Type	Please Select ▾
Address Name		SIC Code	
Address Line 1		Registration Number	
Address Line 2		Turnover	
Address Line 3		Employees	
Postcode		Credit Rating	
Telephone		Credit Limit	
Save Details			

3. If you have the company registration number, enter this into the relevant field and then click on the  (Credit Safe) Icon. If you do not, please go to point 9.
4. The system will then use the XML live gateway to gather the company information direct from Credit Safe and automatically fill out the details it has listed, as indicated below;



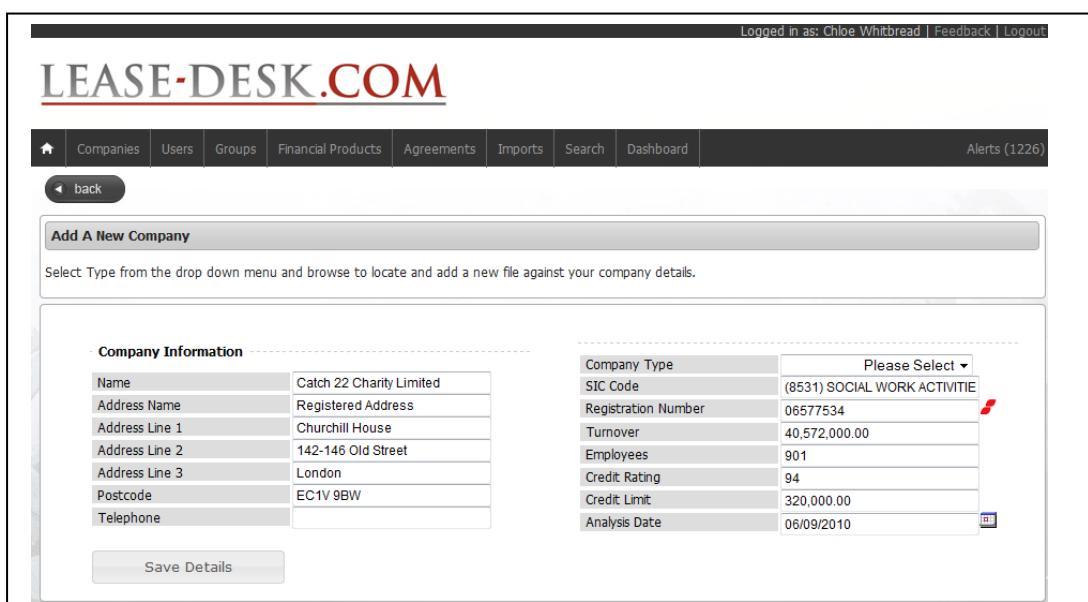
Add A New Company

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

Company Information	
Name	Catch 22 Charity Limited
Address Name	Registered Address
Address Line 1	Churchill House
Address Line 2	142-146 Old Street
Address Line 3	London
Postcode	EC1V 9BW
Telephone	

Company Type	Please Select ▾
SIC Code	(8531) SOCIAL WORK ACTIVITIE
Registration Number	06577534
Turnover	40,572,000.00
Employees	901
Credit Rating	94
Credit Limit	320,000.00
Analysis Date	06/09/2010

Save Details



Add A New Company

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

Company Information	
Name	Catch 22 Charity Limited
Address Name	Registered Address
Address Line 1	Churchill House
Address Line 2	142-146 Old Street
Address Line 3	London
Postcode	EC1V 9BW
Telephone	

Company Type	Please Select ▾
SIC Code	(8531) SOCIAL WORK ACTIVITIE
Registration Number	06577534
Turnover	40,572,000.00
Employees	901
Credit Rating	94
Credit Limit	320,000.00
Analysis Date	06/09/2010

Save Details

5. If known, then complete the telephone number field and the Company Type (Provider, Customer or Vendor).

Save Details

6. Click on

7. You will then be taken to the 'Add a new User' screen as per below;

Add A New User

Fill in the details below and click on Save a New User, to add a new user to your company details. The role set determines the users Lease-Desk access rights.

- **Normal:** Can only view their own agreements.
- **Main:** Can view all agreements related to their company.
- **Super:** Can view all agreements.

Username (Email)	bruce.noble@lease-desk.com	Email Alerts	<input type="checkbox"/>
First Name	Bruce	Role	Normal ▾
Last Name	Noble		
Job Title	Director		
Mobile Phone			
DDI			
Company	Catch 22 Charity Limited		
Address	Registered Address		

Save Details

8. The XML gateway will then gather the first director's information live from credit safe and complete the details, as per above. Provided all of the details are completed, click on

Save Details

9. Complete the following fields;

- Name
- Address Name, i.e. Head Office
- Address Line 1
- Address Line 2
- Address Line 3
- Postcode
- Telephone
- Company Type (Note; This will be either a Provider, i.e. Financial Provider, Vendor, i.e. the technology vendor or Customer, i.e. the end user.)

10. And if known the following additional details;

- SIC Code
- Turnover

- Company Registration (Input N/A if the Company is not a Limited Company)
- Employees
- Credit Rating
- Credit Limit
- Analysis Date (This is the date entered when the Credit Limit and Rating have been checked)

11. Once completed, click on  to save the Company.

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



4.2. Editing a Company:

1. Follow previous steps 1 and 2 (From 4.1).
2. Highlight or double click on the required Company from the main Companies List.

3. Click on 

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

The screenshot shows the 'Edit Company Details' page. At the top, there's a header bar with the LEASE-DESK.COM logo and navigation links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1226). Below the header is a 'back' button. The main area has a title 'Edit Company Details' with a sub-instruction: 'Edit the required Company Details via the individual tables below, i.e. Addresses, Files etc.' There are two main sections: 'Company Information' and 'Addresses'. The 'Company Information' section contains fields for Name (Aaa & D Limited), Save Changes button, and a table with rows for Company Type (Customer), SIC Code ((4521) GENERAL CONSTRUCTI), Registration Number (4735933), Turnover (0.00), Employees (0), Credit Rating (53), Credit Limit (10,000.00), and Analysis Date (16/02/2010). The 'Addresses' section includes buttons for Add Address, Edit Address, Set As Main, and Delete Address, followed by a table with columns for ID, Name, Address, Post Code, and Telephone. A separate 'Files' section is also visible at the bottom.

5. You can then edit any of the Company Information within the following tables;

- **Addresses** (Add, Edit, Delete)
- **Files** (Add, View and Delete)
- **Users** (Add, View and Delete)
- **Providers** (if Company is a Vendor)
- **Groups** (if Company is a Vendor)
- **Financial Products** (if Company is a Financial Provider),
- **Products** (if Company is a Vendor)

5a. In addition, you can click on the  icon to gather the most up to date, live credit information through the XML gateway. Any updates will be recorded in the audit log at the bottom of the page.

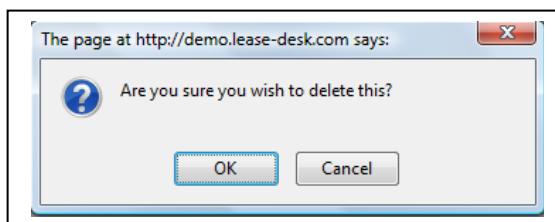
6. For how to Add, Edit, View or Delete any information from the tables listed above, follow the relevant process in chapter 5.

4.3. Deleting a Company:

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



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



3. Select OK to delete or Cancel to cancel the action.

Note: Companies removal will delete everything related to them (Products / Users / Company association) when they are not associated with an agreement.

4. Once deletion has been confirmed, you will be taken back to the main Companies List screen and receive the following confirmation message;

 Deleted Company

4.4. Viewing a Company:

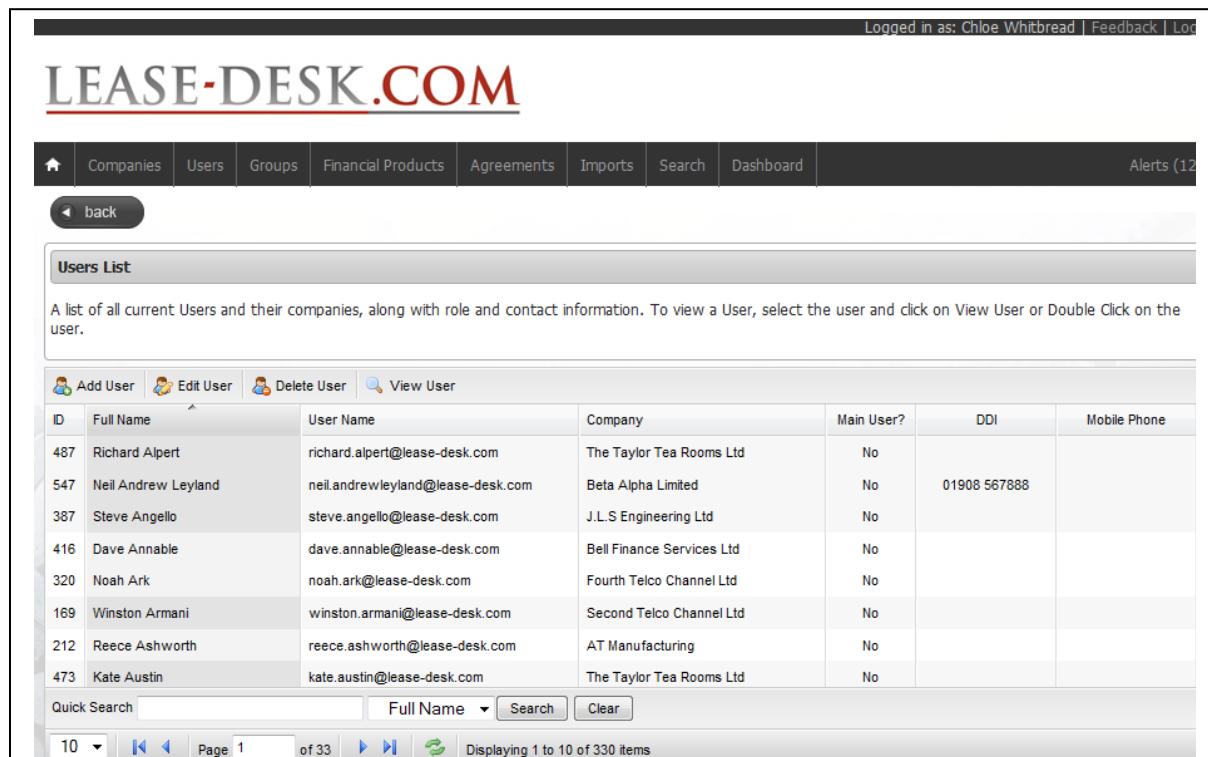
1. Highlight a Company from the table and then click on 
2. You will then be presented with the Company Details screen.

5. Users Screen: Adding, Editing, Viewing & Deleting

5.1. Adding a User:

1. From the main menu go to 

2. This will take you to the main Users screen as indicated below;



ID	Full Name	User Name	Company	Main User?	DDI	Mobile Phone
487	Richard Alpert	richard.alpert@lease-desk.com	The Taylor Tea Rooms Ltd	No		
547	Neil Andrew Leyland	neil.andrewleyland@lease-desk.com	Beta Alpha Limited	No	01908 567888	
387	Steve Angello	steve.angello@lease-desk.com	J.L.S Engineering Ltd	No		
416	Dave Annable	dave.annable@lease-desk.com	Bell Finance Services Ltd	No		
320	Noah Ark	noah.ark@lease-desk.com	Fourth Telco Channel Ltd	No		
169	Winston Armani	winston.armani@lease-desk.com	Second Telco Channel Ltd	No		
212	Reece Ashworth	reece.ashworth@lease-desk.com	AT Manufacturing	No		
473	Kate Austin	kate.austin@lease-desk.com	The Taylor Tea Rooms Ltd	No		

Quick Search: Full Name:

10 | Page 1 of 33 |  Displaying 1 to 10 of 330 items

3. Click on

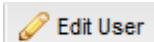


4. You will then be presented with the 'Add a User Screen'.

5. Follow points within the previous chapter, '**3.4.1. Adding a User**'

5.2. Editing a User:

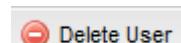
1. To edit a user, highlight the required user and then click on



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

5.3. Deleting a User:

1. To delete a user, highlight the required used and then click on



2. Follow points within the previous chapter, '**3.4.3. Deleting a User**'

Note: User removal will delete everything related to them (alerts/ group association) when they are not associated with an agreement.

5.4. Viewing a User:

1. To view a user, highlight the required user from the table and click on



2. You will then be presented with the View User Details screen as below;

The screenshot shows the 'View User Details' page for a user named Neil Andrew Leyland. The page includes fields for Username (Email), First Name, Last Name, Job Title, Mobile Phone, and DOI. It also shows alert settings for Email Alerts, Role (Normal), Password, and Password Confirm. At the bottom, there are sections for Company (Beta Alpha Limited) and Address (Registered Address). A 'Groups' section is also present.

Username (Email)	neil.andrewleyland@lease-desk
First Name	Neil
Last Name	Andrew Leyland
Job Title	Director
Mobile Phone	01908 557888
DOI	
Company	Beta Alpha Limited
Address	Registered Address

6. Group Screen: Adding, Editing, Viewing, Deleting & Editing Members

Note: The Groups functionality means that individual groups can be created for every required business area (for example, Southern Team, Northern Team). Users are able to share their information as determined by their role type. This is the process of ensuring Senior Managers can view the organisations complete portfolio and Team Managers can view their individual team's success.

6.1. Adding a Group:

- From the Main Users screen as previously shown, go to **Groups**

Groups List		Total Members
15	2nd Telco Channel Enterprise	9
16	2nd Telco Channel SME North	9
17	2nd Telco Channel SME South	9
8	3rd Telco Channel	12
27	4th Telco Channel Enterprise	10
28	4th Telco Channel SME	9
34	Bright Tel Enterprise	9
36	Bright Tel SME North	9

- Click **Add Group**

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

The screenshot shows the 'Add A New Group' page. At the top, there's a navigation bar with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1226). Below the navigation is a 'back' button. The main area has a heading 'Add A New Group' and a sub-instruction: 'Fill in the details below and click on Add Group to create a new group.' There is a 'Name' input field with the placeholder 'Name' and a 'Save Details' button.

Save Details

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



6.2. Editing a Group:

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



2. Click **Edit Group**

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

The screenshot shows the 'Edit Group Details' page. At the top, there's a navigation bar with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1226). Below the navigation is a 'back' button. The main area has a heading 'Edit Group Details' and a sub-instruction: 'Amend the required Group Name and click on Update Group to save changes.' There is a 'Name' input field with the value '2nd Telco Channel SME North' and a 'Save Changes' button.



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



 Updated Group

6.3. Deleting a Group:

Note: Group removal will delete the user associations, whether or not they are used in agreements, it will not delete any Users of the system.

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

2. Click 

3. You will then be presented with the confirmation pop up. Select OK to continue with deletion or Cancel to cancel action.

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



 Deleted Group

6.4. Viewing a Group:

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

2. Click 

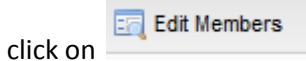
3. You will then be presented with the following View Members screen;

All members within the selected Group are indicated below.

ID	Name	Company	Role
144	Carla McReady	Second Telco Channel Ltd	Read/Writer
237	Mike Versace	Second Telco Channel Ltd	Writer
238	James Purple	Second Telco Channel Ltd	Writer
145	Paul Cabourn	Second Telco Channel Ltd	Reader
146	Eddie Large	Telco Manufacturer Ltd	Reader

6.5. Editing Members:

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



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

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

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

2nd Telco Channel SME South

Edit Member Remove Member

3. Enter the Company name which will bring up the list of companies for you to select.

Note: You can also press space or shift and * which will bring up the full company list.

3a. Once you have selected the company you require, the users within that Company will be displayed.

4. Highlight the required User, and then select a Role from the drop down menu, as detailed below.

Note: The Role Definitions are as follows;

- **Reader:** Someone who views information but doesn't add anything to the group, i.e. Director
- **Writer:** Someone who adds information to the group in terms of agreements, i.e. Account Managers
- **Reader/Writer:** Someone who does both, i.e. Sales Managers (who may also add agreements from time to time)

6. Click

Add

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

2nd Telco Channel SME South			
ID	Name	Company	Role
237	Mike Purple	Second Telco Channel Ltd	Writer
238	James Purple	Second Telco Channel Ltd	Writer
145	Paul Cabourn	Second Telco Channel Ltd	Reader
146	Eddie Large	Telco Manufacturer Ltd	Reader
147	Jimmy Cricket	Telco Manufacturer Ltd	Reader
148	Jilly Cooper	Telco Manufacturer Ltd	Reader
149	Jimmy White	Telco Manufacturer Ltd	Reader
150	Ted Mountbatten	Telco Manufacturer Ltd	Reader

8. To Edit a member highlight the chosen user from the table shown above and click

Edit Member

9. You will then receive the following screen;

User	James Purple
Company	Second Telco Channel Ltd
Group	2nd Telco Channel SME South
Role	Writer ▾

Edit Role

Amend the required Group role and click on Update Group to save changes.

Save Changes

10. Make the required change and click **Save Changes**

11. You will then receive a confirmation message;

Updated member role

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

13. You will then receive the confirmation message, click 'OK' to confirm or 'Cancel' to delete.

14. You will then be taken back to the main Groups List screen.

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

7.1. Adding a Financial Product:

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

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

Add Financial Product Edit Financial Product Delete Financial Product View Financial Product							
ID	Product Name	Company	Type	Term	Secondary Rental Cost	Cancellation Notice	Insurance Required
8	Minimum Period Rental Agreement	Bell Finance PLC	Finance Lease	Minimum Period	Yes	90	Yes
13	RV Lease	Bell Finance PLC	Operating Lease	Minimum Period	Yes	30	No
30	DT Minimum Period Rental Agreement	Bell Finance PLC	Finance Lease	Minimum Period	Yes	90	Yes
28	Finance Mixed Test	Borrow Financial Services Ltd	Finance Lease	Minimum Period	Yes	30	Yes
7	Hire Purchase Agreement	Borrow Financial Services Ltd	Hire Purchase	Fixed Period	No	90	Yes
26	Minimum Term (No Maintenance)	Henry Howard Finance PLC	Finance Lease	Minimum Period	Yes	90	No
4	Fixed Term Rental Agreement	Henry Howard Finance PLC	Finance Lease	Fixed Period	No	90	Yes
31	Chloe Test	Henry Howard Finance PLC	Finance Lease	Minimum Period	Yes	30	Yes

Quick Search Financial Product Name

10 Page 1 Displaying 1 to 10 of 14 items

3. Click

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

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

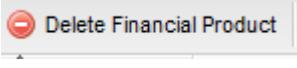
7.2. Editing a Financial Product:

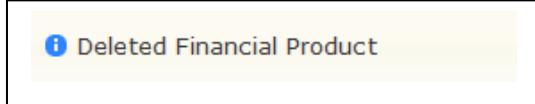
1. Highlight the required Financial Product and click
2. You will then be presented with the 'Edit Financial Product' screen.

3. Follow process in Chapter **5.6.2. Editing a Financial Product**

7.3. Deleting a Financial Product:

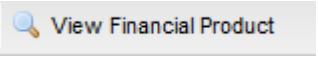
Note: If a Financial Product is associated with a Live Agreement, you will not be able to delete it.

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



 Deleted Financial Product

7.4. Viewing a Financial Product:

1. Highlight the required Financial Product and click 
2. You will then be presented with the View Financial Product screen as indicated below;

The screenshot shows the 'View Financial Product Details' page. At the top, there's a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1). Below the navigation is a 'back' button. The main content area has a title 'View Financial Product Details' and a sub-instruction: 'Amend the required Financial Product details below and click on Edit Financial Product, in order to edit the Users information against your company details.' The form is divided into several sections:

- Provider Information:** Provider Name (Henry Howard Finance PLC), Financial Product Type (Finance Lease), Financial Product Name (Chloe Test), Term Of Financial Product (Minimum Period).
- Target Sale Price:** Target Sale Price (empty), Put Option (Yes (Percentage)), Put Option Cost (2.00%), Secondary Rental Split (Yes (Percentage)), Secondary Rental Split Cost (2.00%).
- Term and Action:** Cancellation Notice (30), Secondary Rental (Yes), Term End Action (Title To Vendor).
- Insurance Requirements:** Insurance Required (Yes), Insurance Action (Provide Policy), Settlement Calculation (Rule Of 78), Settlement Discount (3.00%), Upgrade Calculation (Rule Of 78), Upgrade Discount (3.00%).
- Files:** A section for managing files, showing a single entry: View File.

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

8.1. Adding an Agreement (Live):

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

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

The screenshot shows a table titled 'Agreement List' with the following data:

Id		Identifier	Company	Status	Primary User	RBO Level	End Date
977		IMTE048	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00	
1112		Chloe Test	1AHOWES Estate Agents	Live	Nikki Reed	7358.00	15/02/2013
1029		ALT016	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00	
374		756-0374	1AHOWES Estate Agents	Secondary Period	Nikki Reed	162551.87	24/05/2010
904		IMTE048	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00	
1053		848/014	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00	
1001		AKT013	A A Manufacturing Ltd	Prospect	James Cook	0.00	
1114		Chloe Testing 2	A A Manufacturing Ltd	Prospect	James Cook	0.00	

Quick Search: Company, Search, Clear
Page 1 of 76 Displaving 1 to 10 of 758 items

3. Click

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

The screenshot shows the 'Add a new Agreement' form with the following fields:

- Customer:** Customer, User, Equipment Location
- Provider:** Provider (dropdown menu set to 'None')
- Buttons:** Save Details, Create A New Customer

5. Complete the following details from the drop down boxes;

Note: The Company, User, Vendor, Primary Users and Financial Product will need to be set up on the system prior to adding an agreement. For instructions on how to do this, follow previous chapters. Click 'Create a New Customer' to take you to the Add Company screen if the Customer is not already on the system.

Please be aware that Super Users cannot be associated with an Agreement as their primary function is to 'Edit' and maintain the system whether at the customer site or at Proctor Consulting.

Customer:

- **Customer** (Note: start either typing customers name to bring up the list or press space)
- **User (at Customer)** Note: Follow the same above
- **Equipment Location:** This will default to the main company address but can be amended.

Provider:

- **Provider (As above)**
- **User (at Provider)**
- **Contract**

As indicated below:

Customer	Alpha Media Ltd
User	Zoe Carpenter
Equipment Location	Trading Address

Provider	Bell Finance PLC
User	Chloe Micheala
Contract	Minimum Period Rental Agreement

Note: If there is already a proposal agreement on the system for that particular company you will receive a pop up message to indicate you of this. This is to ensure duplications are prevented. You can override this message by pressing 'Yes' as per below;



Save Details

7. Then click

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

Name	User	Type
1AHOWES Estate Agents	Nikki Reed	Customer
Bell Finance PLC	Rosie Phipps	Provider

Name	Notice	Type
Minimum Period Rental Agreement	90	Finance Lease

Vendor	User	Product	Part	Quantity	Value

9. Next, complete the Vendor and User, product name or part number (the system will auto populate the product name when the Part number is inputted and vice versa), quantity and value.

Vendor	User	Product	Part	Quantity	Value
Voice Tel Comms Ltd ▾	Robbie Williams ▾	Gigabit Ethernet Stand	51009841	2	1000.00
				Total	0.00
			<input type="button" value="Save Details"/>	<input type="button" value="Add Another Product"/>	

10. Click if complete or to add an additional product (repeating previous step).

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

Contract Terms	
Agreement Identifier	<input type="text"/>
Payment Type	<input type="text" value="Please Select ▾"/>
Rate	<input type="text" value="Please Select ▾"/>
Interest Rate	<input type="text"/>
Rate Per 1000	<input type="text"/>
Profile: Initial Payment	<input type="text"/>
Profile: Regular Payment	<input type="text"/>
Payment Frequency	<input type="text" value="Please Select ▾"/>
Initial Payment	<input type="text"/>
Regular Payment	<input type="text"/>
First Payment Date	<input type="text"/>
Status	<input type="text" value="Please Select ▾"/>
Prospect	<input type="text" value="None ▾"/>
Expected Close Date	<input type="text"/>
Acceptance Expiry Date	<input type="text"/>
End of Term	
Secondary Rental	<input type="text"/>
Residual Value	<input type="text"/>

14. Fill in the following details;

- Agreement Identifier (if known – typically the Financial Providers reference)
- Payment Type: Advance or Arrears
- Rate: Interest Rate or Rate per Thousand
Interest Rate: or
Rate per Thousand:
 - Profile: Initial Payment (whether it's 1 or 3 payments)
 - Profile: Regular Payment (how many remaining payments after initial)
 - Payment Frequency: Monthly, Quarterly or Annually

Note: Lease-Desk will then calculate the initial and regular payments from the information previously added above and with the product information added at the Vendor stage.

- First Payment Date: (only applicable if live contract)
- Status: Live, Upgraded, Settled, Default, End of Term, Secondary Rentals, Dead

Note: The Secondary Rental and Residual Value will auto populate from the previous figures entered and from the Financial Product details already within the system.

15. Click

Save Details

16. You will then receive the following confirmation message and be taken back to the Edit Agreement page so that you can check everything that has been entered.

 Created new Agreement

8.2. Adding an Agreement (Prospect):

1. Follow 8.1 on points 1-11 for 'Adding a Live Agreement'.

Note: If using as a quoting tool and no provider is known at this stage, select 'None' from the Provider drop down menu.

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

(Note: this may need to be set up prior to adding the Prospect Agreement)

2. When you get to the 'Contract Terms' (as indicated in point 14 in 8.1), enter the following information;

- Agreement Identifier (if known)
- Payment Type: Advance or Arrears
- Rate: Interest Rate or Rate per Thousand
Interest Rate: or
Rate per Thousand:
- Profile: Initial Payment (whether it's 1 or 3 payments)

- Profile: Regular Payment (how many remaining payments after initial)
- Payment Frequency: Monthly, Quarterly or Annually
- Status: Prospect
- Prospect: None, Quote, Proposed, Referral, Accepted, Declined, Purchase Order, Sent for Payment, Win.
- Expected Close Date
- Acceptance Expiry Date:(only applicable when the agreement is in the Accepted, Purchase Order, Sent for Payment or Win stage.

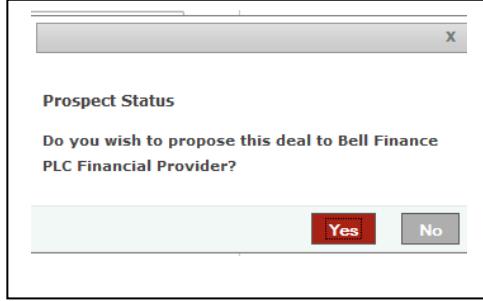
3. Then click on 

4. You will then be taken back to Edit Agreement page List and will be presented with the following confirmation message;



8.3. Proposal Automation:

1. When you have saved a Proposed Prospect agreement a pop up screen will appear asking if you would like to propose this deal to the chosen financial provider, as shown below:



2. Select No, if you wish to wait before sending the information out or click on Yes, to take you through to the 'Add Proposal Note' screen on the following page.

Note: If you wish you send to funder at a later date, on the main agreement page select the following icon which will bring up the same screen as below; 

3. The Company Name box at the top of the screens details the Financial Provider that holds the agreement.

Add Proposal Note

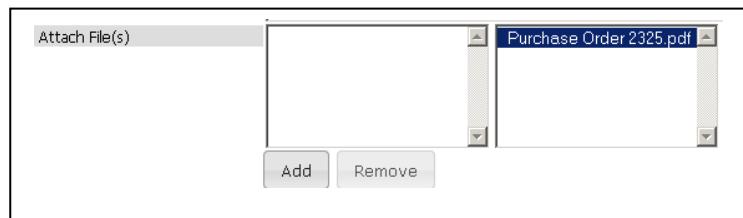
Add a note by adding details to the message box and clicking on Save.

Company Name	Henry Howard Finance PLC				
Send To	<table border="1"><tr><td>Sam McShane</td><td>Everyone</td></tr><tr><td>Rebecca Jones</td><td></td></tr></table>	Sam McShane	Everyone	Rebecca Jones	
Sam McShane	Everyone				
Rebecca Jones					
	<p>Add Remove</p>				
Message	<p>Customer Details:</p> <p>Customer Name: 1AHOWES Estate Agents Customer Primary Contact: Nikki Reed Main Address: Trading Address, Chelmsford, Essex, CM2 0YP Telephone Number: 01245 366 385 Company Registration Number:</p> <p>Agreement Details:</p> <p>Agreement ID: 819 Agreement Identifier (External): TET Prospect Status: Proposed Customer RBO Value: 30633.88 Capital Amount: 0.00 Residual Value: 0.00 Frequency: Monthly Regular Payment: 107.70 Payment Profile: 1-59 Link: https://demo.lease-desk.com/agreement/view/819/</p>				
Attach File(s)	<table border="1"><tr><td></td><td>None</td></tr></table>		None		
	None				
	<p>Add Remove</p>				

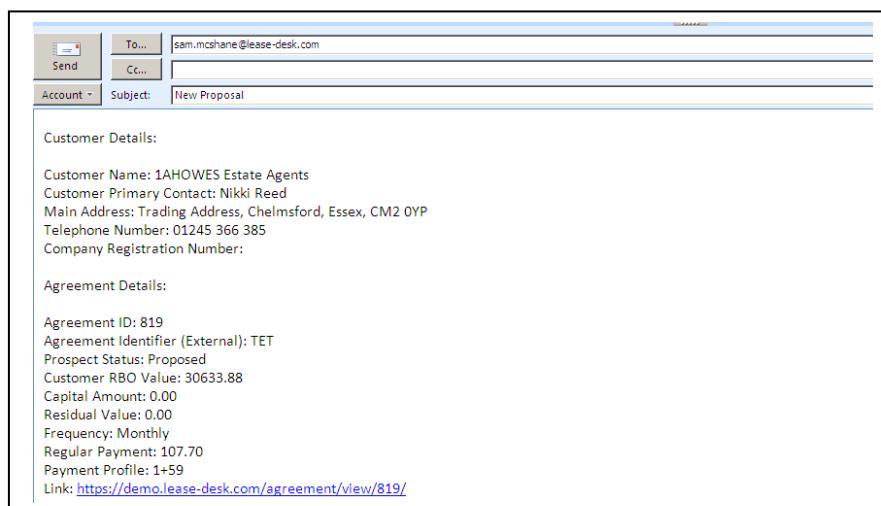
5. In the Message box all of the agreement information is detailed, separated into the following sections:

- Customer Details
- Agreement Details
- Vendor Details
- Product Details

6. If there are any files attached to the agreement these can also be added to the email by highlighting the file and selecting the add button. This will then show as a link on the email that the recipients can download. (**Note: you do not have to have log in details to lease-desk.com to download the files**).

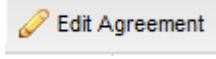


7. After completing all of the above you will come to two buttons at the bottom of the page **Open In Email Client** and **Save Details**, clicking on the saved details button will save all of the information as a note that you can access from the agreements page by going to the Notes table. Clicking on Open in Email Client will take you to a completed email in outlook, detailing all of the information selected in the above stages, shown on the following page:

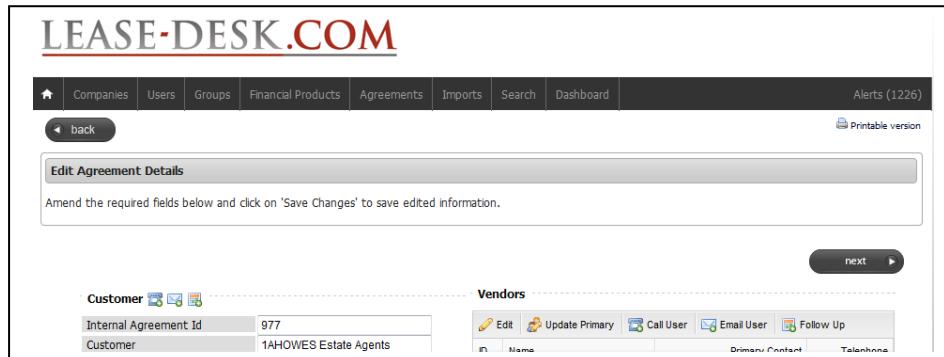


8.4. Editing an Agreement (Live or Prospect):

1. From the main Agreement List, highlight the required Agreement.

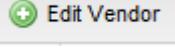
2. Click 

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

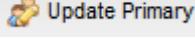


8.4.1 Editing a Vendor:

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

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

8.4.2 Updating Primary Vendor:

1. Highlight the Vendor User and click on 

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

Company	Data Communications Ltd
Current User	Sue Jones
New User	

Update Contact

3. Select the New User (note the required person needs to be already on the system).

4. Click **Update Contact**

8.4.3 Calling or Emailing a Primary Contact:

1. Within the Financial Provider, Vendor or Customer tables, 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

Company Name	Data Communications Ltd
User Name	Sue Jones
Telephone Number	01629 450 321

Add Call Note

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

Message

Save Details

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 a software interface titled 'Add Email Note'. At the top, there is a note: 'Add a note by adding details to the message box and clicking on Save.' Below this is a table with the following data:

Company Name	Data Communications Ltd
User Name	Sue Jones
Email	sue.jones@lease-desk.com
Populate	Agreement Details ▾
Message	Customer Name: 1AHOWES Estate Agents Agreement ID: 977 Agreement Identifier (External): IMTE048 Prospect Status: Accepted Agreement RBO Value: 0.00 Customer RBO Value: 7358 Prospect Status: Accepted Agreement Value: 14803.06 Regular Payment: 983.52 Payment Profile: 1+19 Link: https://phase2.lease-desk.com/agreement/view/977/

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.

8.4.4 Creating Follow Ups:

1. Highlight the contact required from either the Financial Provider, Customer or Vendor tables as indicated below;

Customer	
Internal Agreement Id	513
Customer	A A Manufacturing Ltd ▾
User	James Cook ▾
Credit Limit	1,250.00
Credit Rating	92
Analysis Date	11/04/2009
Provider	
Provider	Borrow Financial Services ▾
User	Dan Sadler ▾
Contract	Hire Purchase Agreement ▾

2. Click on  Follow Up

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

[back](#)

Add Calendar Note

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

Company Name	Data Communications Ltd
User Name	Sue Jones
Subject	Test
Date	<input type="text"/>
Notes	<input type="text"/>

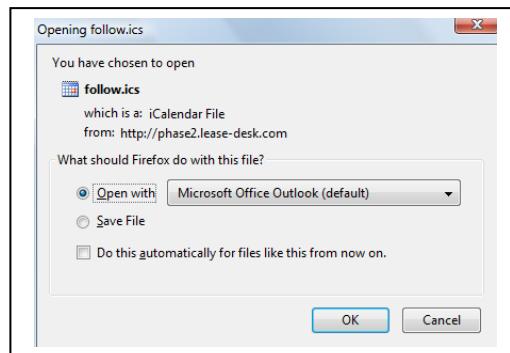
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

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

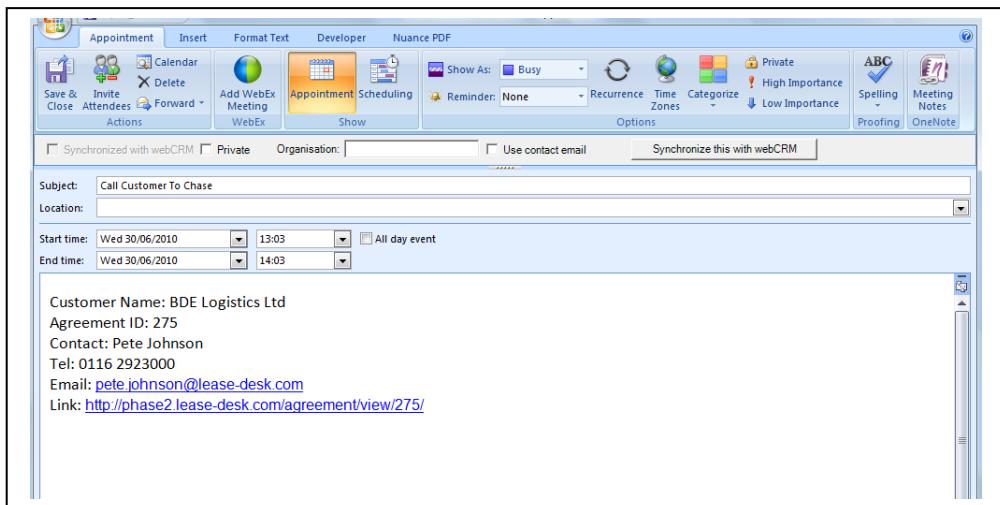
5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

6. Click **Open In Local Calendar** to open up your email.

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.

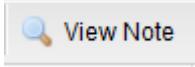
8.4.5 Adding, Viewing and Deleting a File:

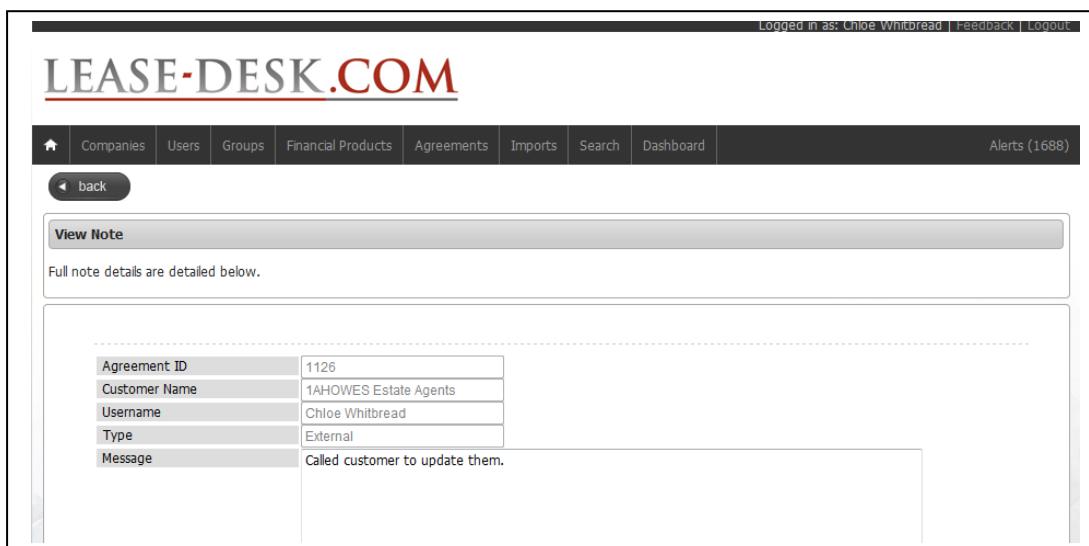
1. To Add, View or Delete a File, follow chapter **3.2. Adding, Viewing and Deleting Files**

8.4.6 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
ID	Type	Name	Note	Date
110	Internal	Steve Barnard	Chloe testing notes	22/03/2010 11:14:51
109	External	Steve Barnard	sdsdsdsdsd	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;



The screenshot shows the 'View Note' page from LEASE-DESK.COM. At the top, there's a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1688). Below the navigation is a back button labeled 'back'. The main content area is titled 'View Note' and contains the message: 'Full note details are detailed below.' Below this, a table displays the following information:

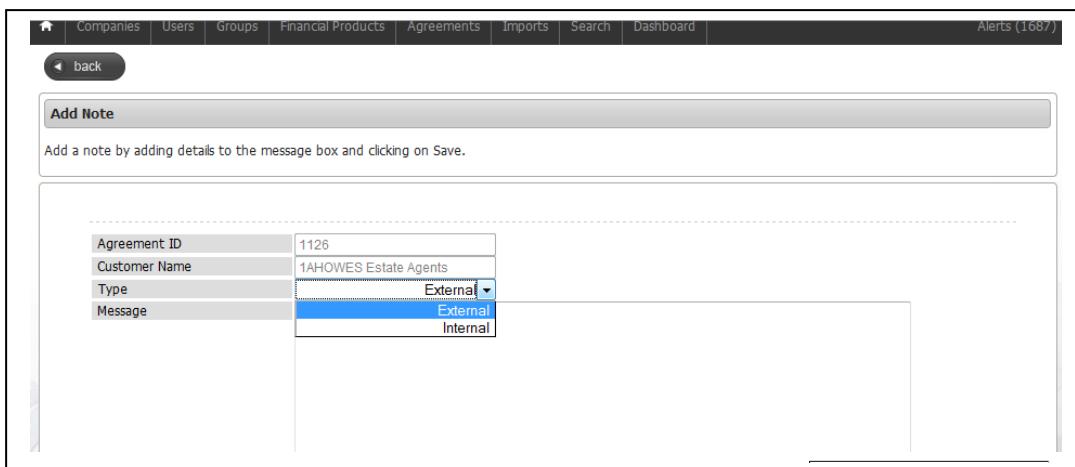
Agreement ID	1126
Customer Name	1AHOWES Estate Agents
Username	Chloe Whitbread
Type	External
Message	Called customer to update them.

8.4.7 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 can view the particular agreement within the user's organisation.

4. Type your message into the blank box

5. Click

Save Details

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

8.4.8 Editing a Note

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

2. Highlight the required note and click

Edit Note

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

Logged in as: Chloe Whitbread | Feedback | L

LEASE-DESK.COM

Companies Users Groups Financial Products Agreements Imports Search Dashboard Alerts (

back

Edit Note Details

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

Agreement ID	1126
Customer Name	1AHOWES Estate Agents
Username	Chloe Whitbread
Type	External
Message	Called customer to update them.

Save Changes

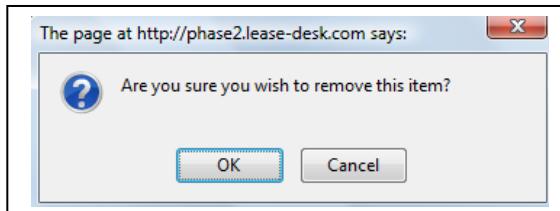
4. Amend the note as required and then click

8.4.9 Deleting a Note:

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

2. Highlight the required note and click on

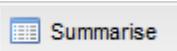
3. You will then be presented with the following confirmation message;



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

8.4.10 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;

The screenshot shows a web-based application interface for 'LEASE-DESK.COM'. At the top, there's a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1227). Below the navigation bar, a sub-menu bar includes 'back' and 'Printable version'. The main content area is titled 'View Summarised Notes'. A table displays a single note entry:

ID	Type	Name	Recipient	Note	Date
370	External	Chloe Whitbread		test	06/09/2010 15:33:32

8.4.11 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 then click to receive the following screen;

The screenshot shows a 'View Audit Log' screen. At the top, there's a navigation bar with links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1227). Below the navigation bar, a sub-menu bar includes 'back' and 'Printable version'. The main content area is titled 'View Audit Log'. A table displays a list of audit log entries:

Name	Date	Action
Chloe Whitbread	06/09/2010 15:33:32	Created new note with id: 370
Chloe Whitbread	06/09/2010 15:29:45	Viewed the agreement from an edit page
Chloe Whitbread	03/09/2010 13:43:21	Viewed the agreement from an search page
Debra Taylor	01/09/2010 16:17:27	Viewed the agreement from an edit page
Daniel Proctor	27/08/2010 10:10:01	Field: Prospect was updated, previously read: Proposed
Sue Jones	27/08/2010 10:10:01	Alert issued 4542: Agreement Changed
Daniel Proctor	27/08/2010 10:09:41	Viewed the agreement from an edit page
Daniel Proctor	24/08/2010 18:10:08	Viewed the agreement from an search page

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

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

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

8.4.12 Adding and Deleting a Product:

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

8.5. Deleting an Agreement:

Note: Agreements will delete everything related to them (including the audit log).

1. Highlight the required Agreement from the main Agreement Lists screen as indicated below;

Id		Identifier	Company	Status	Primary User	RBO Level	End Date
977	IMTE048	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00		
1112	Chloe Test	1AHOWES Estate Agents	Live	Nikki Reed	7358.00	15/02/2013	
1029	ALT016	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00		
374	756-0374	1AHOWES Estate Agents	Secondary Period	Nikki Reed	162551.87	24/05/2010	
904	IMTE048	1AHOWES Estate Agents	Prospect	Nikki Reed	0.00		
1053	848/014	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00		
1114	Chloe Testing 2	A A Manufacturing Ltd	Prospect	James Cook	0.00		
1001	AKT013	A A Manufacturing Ltd	Prospect	James Cook	0.00		

Quick Search Company Search Clear

10 | < | > | Page 1 of 76 | >> | | Displaying 1 to 10 of 758 items

2. Click

8.6. Viewing an Agreement:

1. Highlight the required Agreement from the main Agreement Lists screen as indicated previously.

2. Click

3. You will then be presented with the full View Agreement Details screen (which mirrors the Edit Agreement screen previously shown without the editing facilities), as indicated on the following page;

Contract Terms:

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

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

End of Term:

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

Companies Information:

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

Financial Product Information:

This indicates the Financial Product information

Upgrade Options:

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

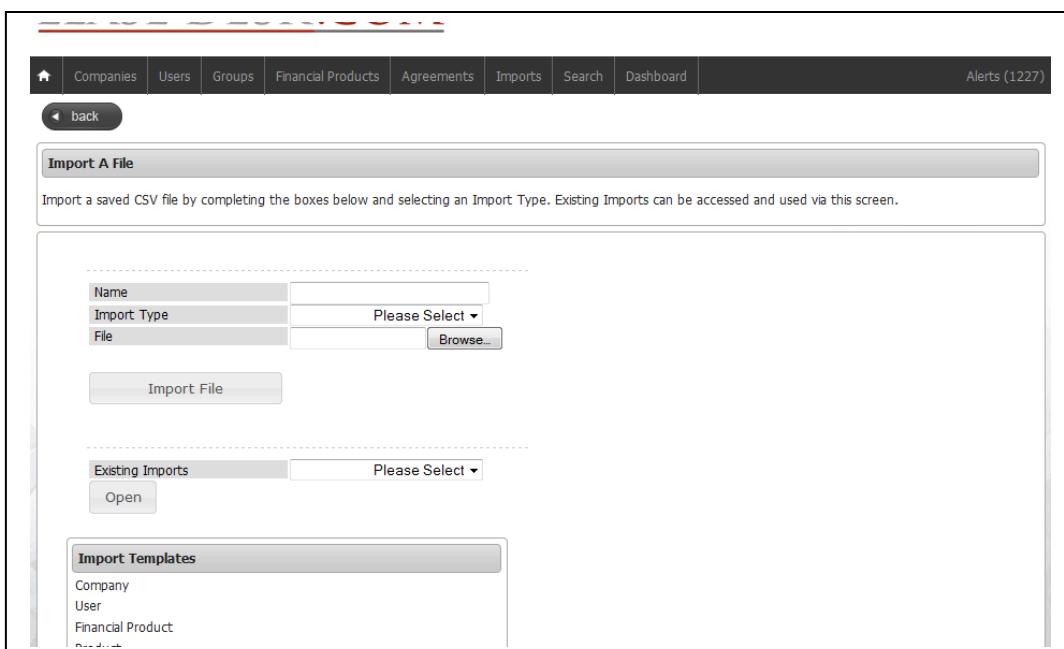
Product Information:

This indicates the Product (s) within the agreement.

The screenshot shows a detailed view of the Lease-Desk.com software interface. It includes sections for Customer details, Contract Terms (with a red box around the RBO Level field), Companies (listing three entries: Loft Design Ltd, Siemens Financial Services, and Telco Channel Ltd), Financial Product (listing a Minimum Period Rental Agreement), Notes, Files, Products (a grid of items from Telco Channel Ltd), and an Audit Log. Arrows point from the descriptive text boxes on the left to specific fields or sections in the interface.

9.0. Imports

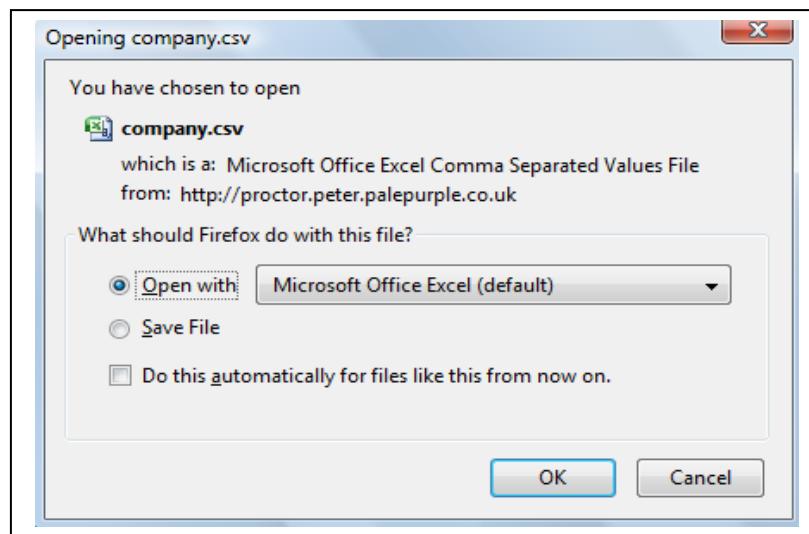
1. Lease-Desk has an Import functionality allowing users to quickly import information using a pre-saved CSV file matching the headers required for each of the imports, for example, Company, Users etc.
2. To Import a file, firstly select **Imports** from the top main menu.
3. You will then be presented with the 'Import a File' screen as indicated on the following page;



4. There are six different types of imports available within Lease-Desk. You will find the Sample Import templates on the 'Import a File' screen as indicated above. To select one, click on the title, for example 'Company'.

Note: Always ensure you follow the import order specified on the Import a File page as above, i.e. Company first, and then Users, otherwise import will fail.

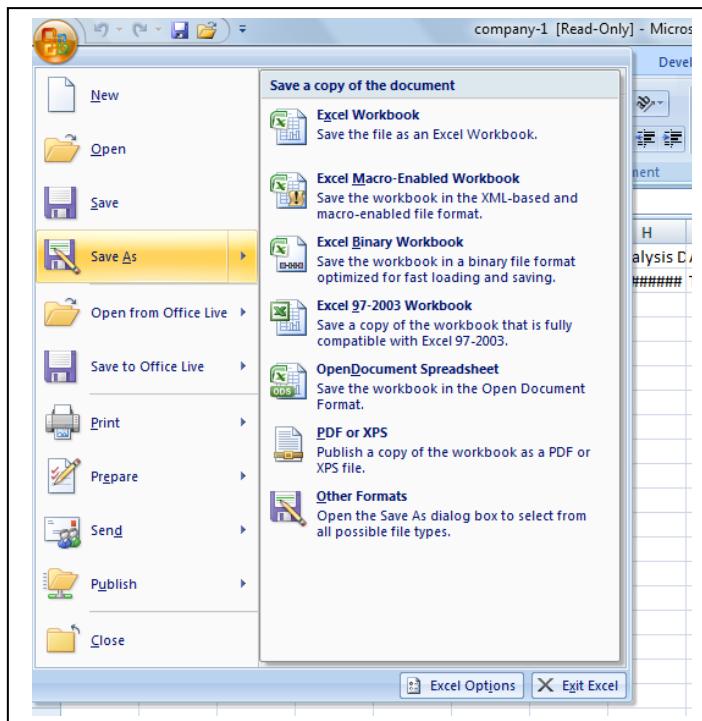
5. You will then be presented with the following pop up screen for opening the CSV template;



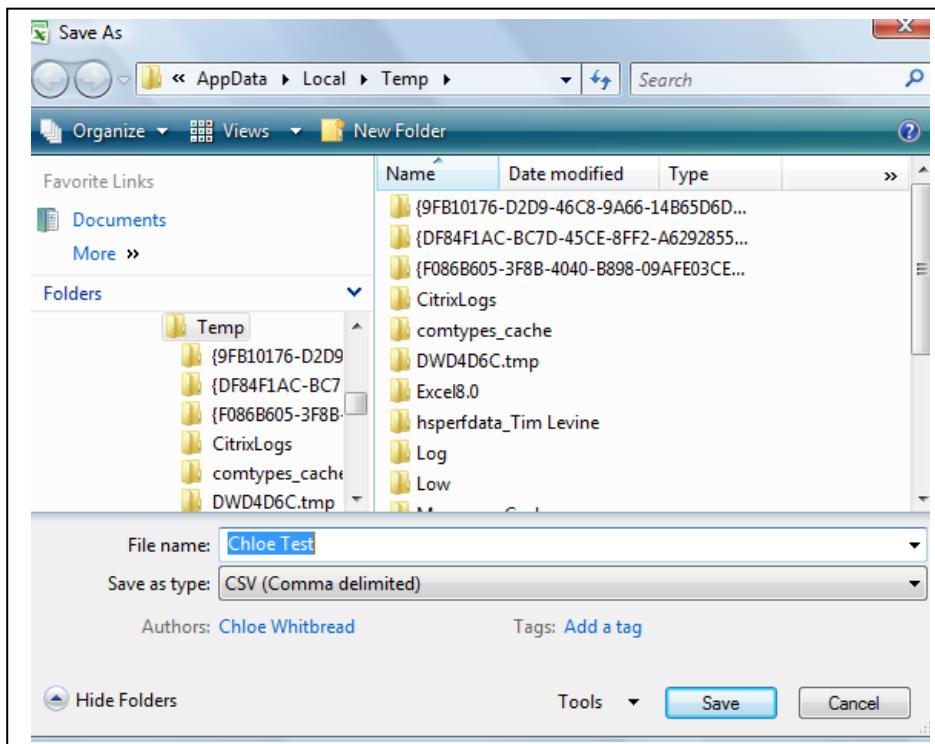
6. Click to open with Excel
7. You will then be presented with the template containing the headers required for the import, as per below;

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

8. Add the import data for the specified import, following the template headings and test data.
9. Highlight the second line of test data and then click on delete (to ensure the test data doesn't get imported).
10. Once completed, click on 'Save As' as below;



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



12. Go back to the 'Import a File' screen as indicated previously, to import your previously saved CSV File.

13. Fill in the following details;

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

14. 14. Click

Import File

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

Row	Name	Type	Sic	Registration Number	Turnover
1	Alpha	Customer	1533	1680161	null

17. If the import data is correct and ready for the full import, all areas will appear in green as above. If there are any duplications or errors, the problem areas will appear in red, hover over the red box with your mouse to receive the explanation, as per below;

Row	Name	Type	Sic	Registration Number	Turnover
1	B.I LIMITED	Customer	1533	1680161	null

18. To edit the incorrect or duplicated data in red, click on the information and re-enter.

19. Then click 'Save'

20. To remove the import, click on **Remove Import File**

21. To reverse the import, click **Reverse Import**

21a. When you click on 'Reverse Import' you are taken to a new screen which then scans the system for matches and then displays the total per row and the ID of the result it will remove. You then need to select 'Delete Data' to complete the reverse.

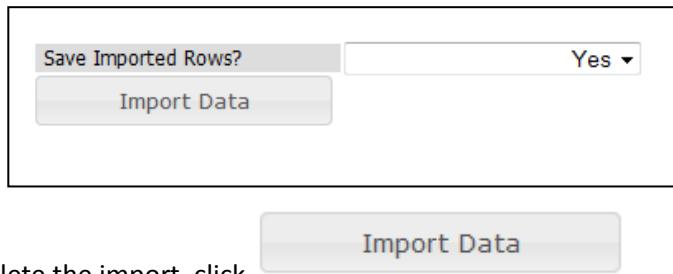
Note: You can only reverse an import if it has been imported onto the system previously.

The Delete only works on the following rules;

- Only one ID per row will be deleted on each delete run
- It will delete the highest matching ID within the system
- The Delete run follows the standard pattern, i.e. users cannot be deleted if attached to an agreement

22. To import the Credit Safe data using the XML, click **Import CreditSafe Data**

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



23. To complete the import, click

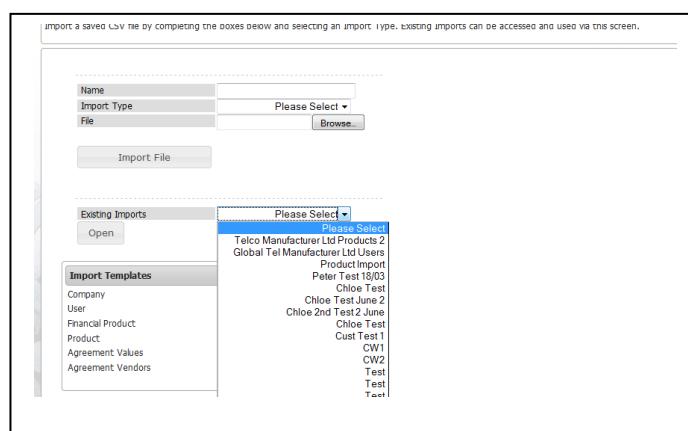
Import Data

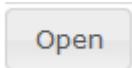
24. You will then be taken back to the main imports screen

25. Continue the above process for every type of import required

9.1. Using an Existing Import:

1. Go to **Imports** from the top main menu.
2. You will be presented with the main 'Import a File' screen as indicated previously.
3. Go to the 'Existing Imports' dropdown menu and select one of the imports, as indicated below;



4. Click 

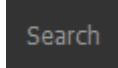
5. You will then be presented with the existing import data.

6. Complete the following details;

- Overwrite Company: Type the name of the company that you wish to add the import to (if it is a different company to the one on the original import), or No if not. (This function is only available when viewing a Product Import.)
- Save Imported Rows: As previously shown, Yes to save the new import, No to remove once actioned.

7. Click  to complete import

10. Search:

1. Go to  on the top main menu.

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

Search Mode

Type: Standard Search

Customer

Name, Agreement Status (All), Prospect Status (All)

Date Range: From Dec 2010 To Dec 2010

Product

Product, Filter, Add, Remove

Agreement

Months Left (All), RBO Level (All)

Customer Detail

Sic Code, Filter, Add, Remove

Vendor

Vendor, Filter, Add, Remove

Group

Group, Filter, Add, Remove

Provider

Provider, Filter, Add, Remove

Financial Product Name

Financial, Financial Product Type (All)

Output Type

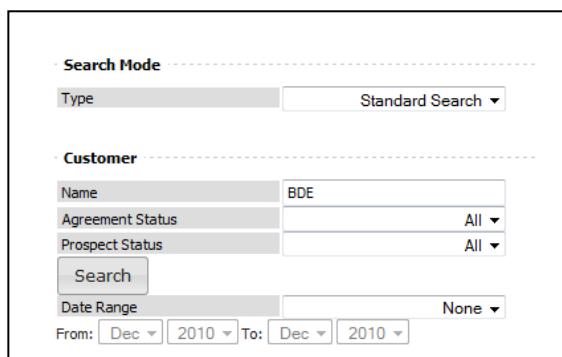
Report: Default, View Report, Export to CSV, Reset Form

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

2. To bring up the information in any of the tables, click 
3. To remove any data selected, click 

10.1. Searching for Specific Customer Agreement Information:

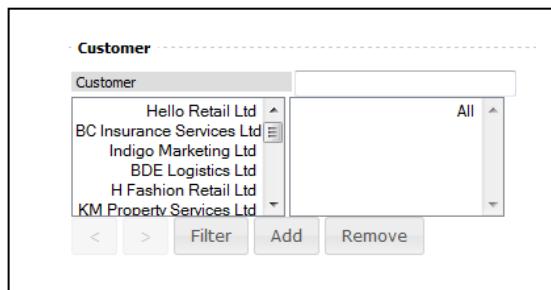
1. From the main 'Search Agreements' screen as indicated previously, enter the full or first few letters of the company name you are looking for, as per below.



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'

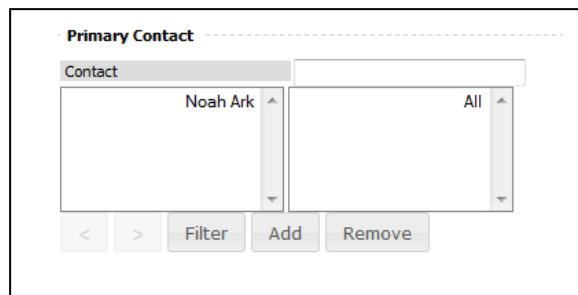
3. Click 

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



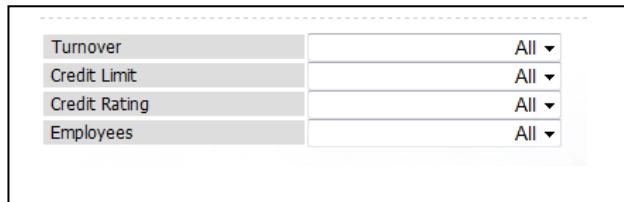
5. To include any of the produced data, within each table, highlight the required data, i.e.
Primary Contact, and then click 

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

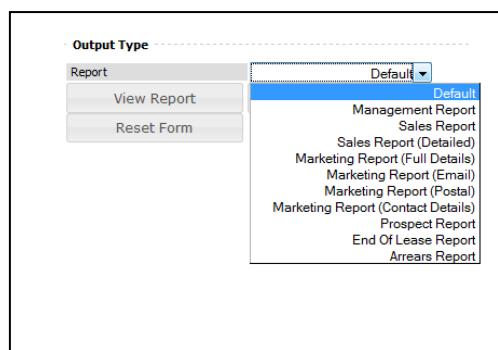


7. Carry on with each table required, following the previous step.

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 [View Report](#) to receive the following page;

The screenshot shows a search results page for agreements. The grid includes the following data:

ID	Identifier	Company	Status	Primary User	RBO Level	End Date
1116	Chibe Testing 4	Alpha Accident Claims Limited	Prospect	Waseem Raja	0.00	
1104		Alpha Media Ltd	Live	Zoe Carpenter	28437.34	01/06/2012
893	IMTE037	Alpha Media Ltd	Prospect	Zoe Carpenter	0.00	
1047	848/008	Alpha Media Ltd	Prospect	Zoe Carpenter	0.00	
135	NTD048	Alpha Media Ltd	Live	Zoe Carpenter	37076.24	01/10/2013
280	DJNT03	Alpha Media Ltd	Prospect	Zoe Carpenter	0.00	
6	119123980	Alpha Media Ltd	End of Term	Mark Gilson	17451.66	24/05/2010
629	Live24	Alpha Media Ltd	Live	Mark Gilson	9264.86	01/10/2010

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

The Excel spreadsheet contains the same data as the search results grid, listing 17 customer agreements with their respective details.

10.2. Searching for all Customer Agreement Information:

- From the main 'Search Agreements' screen as indicated previously, leave the Customer name field blank and Status and Prospect Status set to 'All'

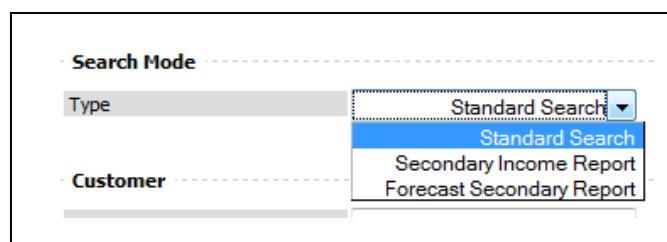
- Click **Search**

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.

10.3. 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;



10.3.1 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.

A screenshot of a 'Customer' search form. It includes fields for 'Name' (empty), 'Agreement Status' (set to 'Secondary Period'), 'Prospect Status' (set to 'All'), a 'Search' button, and a 'Date Range' section. The 'Date Range' section contains dropdown menus for 'From' (May) and 'To' (Dec), both set to the year '2010'. There is also a 'Agreement Active After' dropdown set to '2010'.

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

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

Export to CSV

as indicated below;

10.3.2 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

Export to CSV

as indicated below;

11. Dashboard:

This screen provides users with a snap shot of their organisational live agreement and Prospect information determined by role type, for example Managers set as Main will be able to view all of their team's information in an instant.

11.1. Prospects:

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

1. Go to **Dashboard** on the main top menu.

2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a graph showing all figures, as indicated below;

The screenshot shows the 'Prospects' page of the Lease-Desk.com application. At the top, there is a navigation bar with links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. A red box highlights the 'Dashboard' link. To the right of the navigation bar, there are 'Alerts (12)' and a 'Printable version' link. Below the navigation bar, there are two tabs: 'Prospects' (which is selected) and 'Customers'. A message box prompts the user to select a date range and status options to produce graphical information. Below this, there is a 'Select Period' button with dropdown menus for 'From' (set to Feb 2010) and 'To' (set to Sep 2010), and a 'Select Period' button. On the left, there are two tables: 'Prospects by Company' and 'Prospects by Group'. The 'Prospects by Company' table lists companies with their respective prospect counts. The 'Prospects by Group' table lists groups with their respective prospect counts. On the right, there is a large, multi-colored pie chart representing the distribution of prospects by customer company.

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

ID	Group	Prospects

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**. Alternatively, double click on the required line.

11.1.1 Viewing Top Prospect Information in Graphical Format:

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

		Value
All	180	£8,590,078.71
All	136	£4,256,088.28
None		£3,805,936.57
Quote		£3,030,061.08
Proposed		£2,258,171.03
Referral		£2,135,688.47
Accepted		
Declined		
Purchase Order		
Sent For Payment		
Win		

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

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

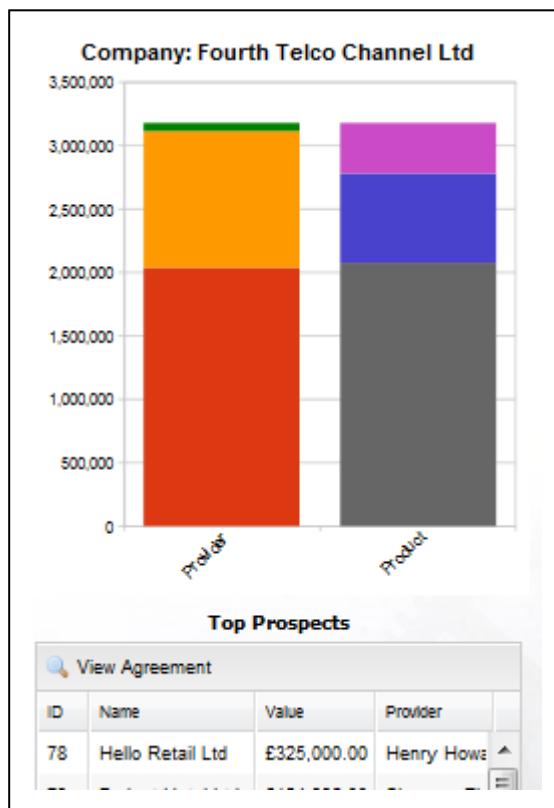
4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click

Chart Result

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

Note: You can view any of the individual pie chart or bar chart segment by double clicking on the required segment/area.



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

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

11.2. Customers:

1. Select the **Customers** tab 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**

The screenshot displays the Customer Dashboard with the following sections:

- Prospects** and **Customers** tabs at the top.
- A central message: "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**: A table listing companies with their IDs, names, and values.
- RBO By Company**: A pie chart showing the distribution of RBO by company.
- Agreements Nearing End Of Term**: A table listing agreements with their IDs, companies, RBO values, and months left.
- View Portfolio**: Buttons for "All" and "Select".
- Please Select** dropdown and **Display Graph** button.
- Top Repeat Business Opportunities**: A table showing the top opportunities with their IDs, companies, RBO values, and customer RBO values.

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;

The screenshot shows a software interface with a top navigation bar containing links for Companies, Users, Groups, Financial Products, Agreements, Imports, Search, and Dashboard. A red 'Alerts (1227)' button is also present. Below the navigation is a search bar with the placeholder 'Repeat Business Opportunity by Group'. The main content area displays a table with columns: Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. The table contains several rows of data, such as '1112 Chloe Test' and '687 Live20'. At the bottom of the table are search and filter controls, including 'Quick Search', dropdowns for 'Company' and 'Search', and buttons for 'Search' and 'Clear'. Navigation buttons for 'Page 1 of 10' and a total count of 'Displaying 1 to 10 of 97 items' are also visible.

Repeat Business Opportunity by Group							
Below are the results from your search							
				Status	Primary User	RBO Level	End Date
1112	Chloe Test	1AHOWES Estate Agents		Live	Nikki Reed	7358.00	15/02/2013
687	Live20	ABC University		Live	John Ross	11614.21	01/10/2011
622	Live20	ABC University		Live	John Ross	11883.58	01/10/2011
641	Live30	Adva Logistics Ltd		Live	Shelley Thompson	68401.38	01/06/2011
1118	Chloe Test	Adva Logistics Ltd		Live	Shelley Thompson	5753.00	03/02/2014
1104		Alpha Media Ltd		Live	Zoe Carpenter	28437.34	01/06/2012
1107	Chloe Test	Alpha Media Ltd		Live	Zoe Carpenter	31037.00	12/02/2012
1099	BGT025	Antique Rings Ltd		Live	Stefan Salvatore	20980.57	01/03/2012

5. You then have the option to add a completely new Agreement, Edit the Agreement, delete the Agreement, View Agreement, and View Log (Audit Log). Refer back to Chapter 8 for how to do this.

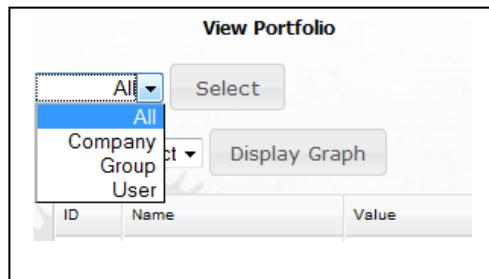
11.2.1 Viewing/Amending Portfolio Information:

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

The screenshot shows a 'View Portfolio' interface with a title bar. Below it are two buttons: 'All' with a dropdown arrow and 'Select'. Underneath is a dropdown menu labeled 'Please Select' with a dropdown arrow, and a 'Display Graph' button. A table follows, with columns: ID, Name, and Value. The table contains four rows of data, each representing a company and its value.

View Portfolio		
All	Select	
Please Select		
ID	Name	Value
178	Fourth Telco Channel Ltd	£4,500,069.41
182	Bright Tel Ltd	£1,468,727.61
102	Telco Channel Ltd	£1,305,548.54
135	Voice Communications Ltd	£1,299,251.62

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



3. Click **Select**

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

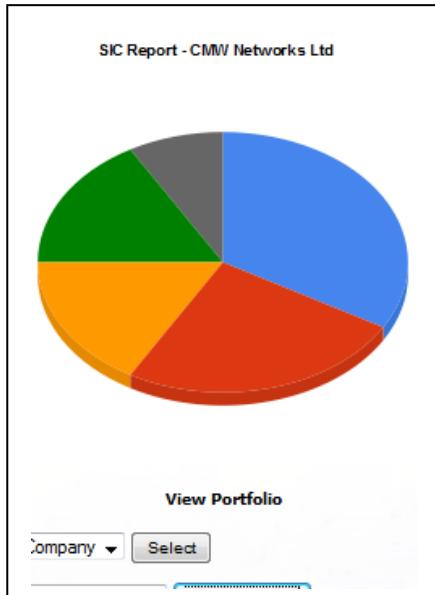
5. Next select the Agreement grouping from the drop down menu, as indicated below;

All ▾	Select
Please Select ▾	Display Graph
Please Select	
Provider	
Customer	
Product	
Term	
SIC code	
Months to Run	
135	Voice Communications Ltd
	£1,299,251.62

6. Highlight the required row from the table and click **Display Graph**

ID	Name	Value
176	Fourth Telco Channel Ltd	£4,500,069.41
182	Bright Tel Ltd	£1,468,727.61
102	Telco Channel Ltd	£1,305,548.54
135	Voice Communications Ltd	£1,299,251.62
180	Voice Tel Comms Ltd	£1,162,029.22
106	Third Telco Channel Ltd	£1,107,074.19

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



12. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to Vendor and Administration users. As an Administrator, you will be able to view all of the Alerts generated by the system, until a user 'Completes' an Alert that they have received. This will then be removed from the system and the details will be shown in the Audit Log.

Please note: The alert triggers below will also be generated to all members higher up within your organisational hierarchy that have visibility to their 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 the 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 cancellation 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)***

Alerts (1227)

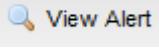
1. To view your individual user alerts, select **Alerts (1227)** from the top menu.

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

The screenshot shows the Lease-Desk.com interface with the 'My Alerts' page. The top navigation bar includes links for Home, Companies, Users, Groups, Financial Products, Agreements, Imports, Search, Dashboard, and Alerts (1227). Below the navigation is a 'back' button and a 'Printable version' link. The main content area is titled 'My Alerts' and displays a message: 'A full list of pending alerts requiring user action.' Below this is a table with columns: ID, Recipient, Company, Groups, Message, and Time. One alert is listed:

ID	Recipient	Company	Groups	Message	Time
1709	Graham Lambert	Bright Tel Ltd	Bright Tel Enterprise	New prospect agreement: Customer Name: DD Financial Systems Ltd Agreement ID: 574 Agreement Value: 10000.00 Provider: Siemens Financial Services Ltd Regular Payment: 980.00 Payment Profile: 1+11 Financial Product Type: Finance Lease Financial Product Name: Minimum Period Rental Agreement Term Of Contract: Minimum Period Cancellation Notice: 90 Insurance Action: Forward Insurance Certificate	23/04/2010 15:36:28

At the bottom of the table are buttons for 'View Alert', 'Forward Alert', and 'Completed Alert'. Below the table are search and pagination controls: 'Quick Search', 'Recipient', 'Search', 'Clear', 'Page 1 of 123', and 'Displaying 1 to 10 of 1227 items'.

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

12.1 Viewing Alerts:

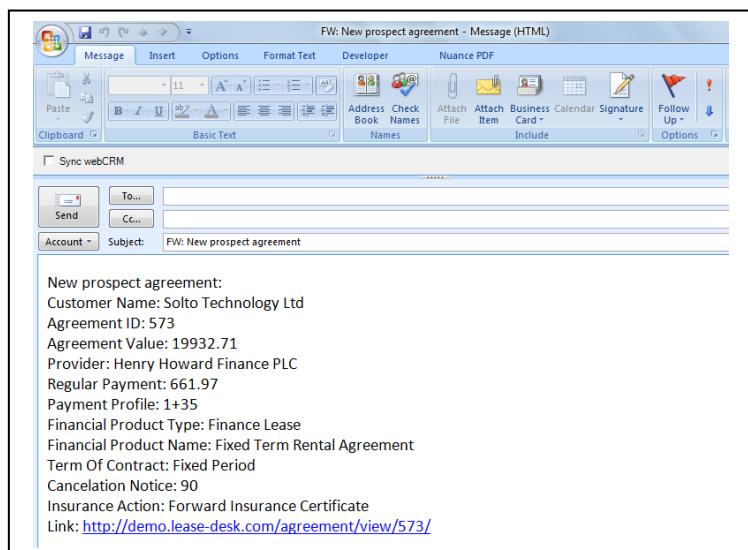
1. Highlight the required alert from the table and then click on 

12.2 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.

12.3 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;



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

The screenshot shows a 'View Alert' page from the Lease-Desk.com application. At the top, there's a navigation bar with links for 'Companies', 'Users', 'Groups', 'Financial Products', 'Agreements', 'Imports', 'Search', and 'Dashboard'. To the right of the navigation bar, it says 'Alerts (12)'. Below the navigation bar, there's a 'back' button and a 'next' button with a right-pointing arrow. The main area is titled 'View Alert' and contains the following information:

Recipient	Graham Lambert
Subject	New Prospect Agreement
Message	<p>New prospect agreement: Customer Name: DD Financial Systems Ltd Agreement ID: 574 Agreement Value: 10000.00 Provider: Siemens Financial Services Ltd Regular Payment: 980.00 Payment Profile: 1+11 Financial Product Type: Finance Lease Financial Product Name: Minimum Period Rental Agreement Term Of Contract: Minimum Period Cancellation Notice: 90</p>
Time	23/04/2010 15:36:28

At the bottom left is a 'Complete Alert' button.

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



13. General Functionality:

13.1. 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

Company
Zeeta Insurance Ltd
XYZ Sandwiches Ltd
XYZ Foods Ltd
XYZ Cakes Ltd
Walkaway Hair Ltd
Walloway Hair Ltd

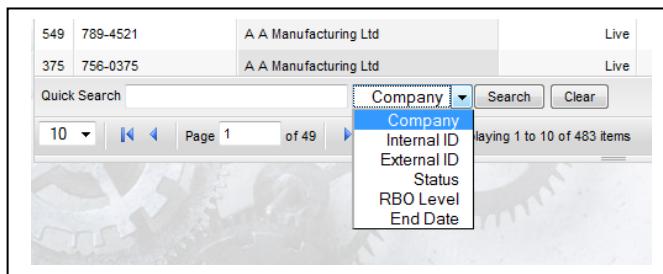
After Sort

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

13.2 Quick Search:

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.

13.3 Refresh:

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

13.4 Scrolling through records:

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

- Forward to next page of records
- Forward to end of records



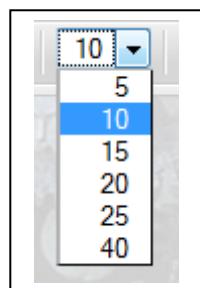
Go back to previous page of records



Go to the start of the records

13.5 Changing the amount of records per view:

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



13.6 Last 10 Records:

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

Name	Equipment Location	Provider Name	External Id
1 Field Street	Siemens Financial Services Ltd	000029	
1 Field Street	Bell Finance PLC	CMW05	
12 Bedford Street	Bell Finance PLC		
Any High Street	Borrow Financial Services Ltd	CMW04	
16 Church Lane	Borrow Financial Services Ltd	IMTE029	
56 Byker Street	Lend Finance PLC	756-0368	
St. George Street	Henry Howard Finance PLC		

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

14. Feedback:

1. Users have the ability to contact the Lease-Desk administration team using the Feedback functionality. To action this, they will select **Feedback** from the main menu.
2. The user will then be presented with the 'Feedback Form' screen as indicated below;

Logged in as: Chloe Whitbread | Feedback | Logout

LEASE-DESK.COM

Companies Users Groups Financial Products Agreements Imports Search Dashboard Alerts (1227)

back

Feedback Form

If you require assistance in any way or have any feedback for us, please fill out the below form and someone will contact you shortly.

Subject

Message

Send Feedback

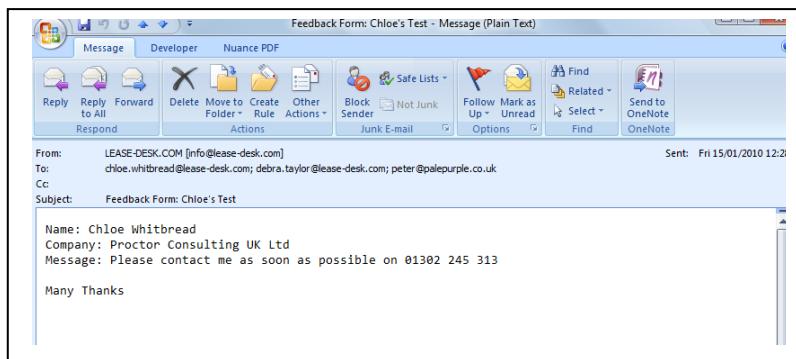
6. The user will need to add a Subject Title and complete the message detail box.

7. Once completed, click

8. An email will then get sent to the Administration Team, as indicated below



9. The email generated will appear in the team's inbox as below;



15. Contact Details:

If you require any additional Lease-Desk information please contact us at;

Proctor Consulting UK Ltd,
Manor Farm,
Harwell,
Doncaster,
South Yorkshire,
DN10 5BU

Switchboard: 01302 245310

Email: info@Lease-Desk.com

www.Lease-Desk.com