

LEASE-DESK

Normal Access User Manual

Version 2.0



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1. Introduction to Lease-Desk:

Lease-Desk is a Portfolio Management System designed specifically by Proctor Consulting which provides a dedicated platform for Vendors to view and manage all current and pending Customer Agreements in one place.

Once the existing Vendor data has been uploaded by Proctor Consulting's Lease-Desk Administration team, main access users are able to view and/or edit their individual or teams current pending or live customer agreements, and view an overall snapshot of all current agreements via the Dashboard. All available repeat business opportunities are indicated via the dashboard functionality so that users can view all leasing activity, making it easier to manage and ensure no repeat business opportunity gets missed again.

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

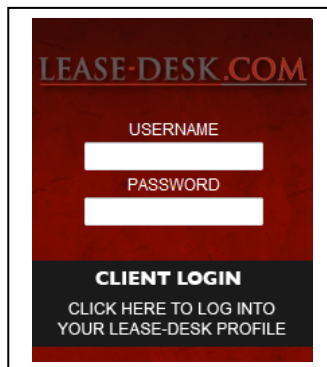
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

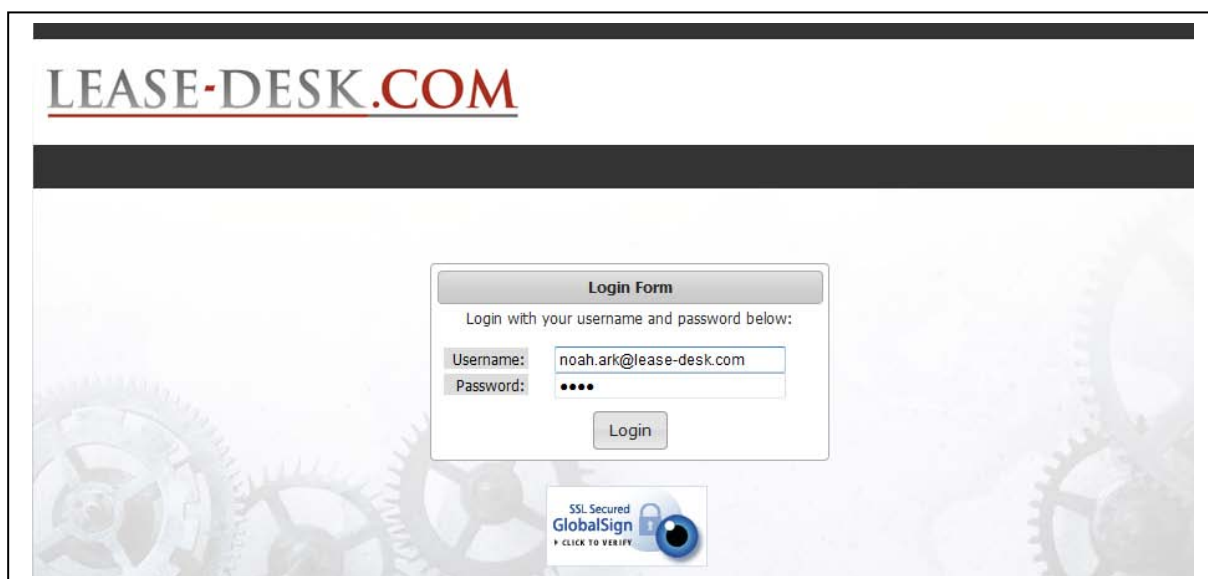
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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

2. Logging into Lease-Desk:

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



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



3. Enter your details and click on

Login

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

3. Home Screen: Adding, & Viewing

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

LEASE-DESK.COM

Home | Agreements | Search | Dashboard | Alerts (50)

← back

Company Details

Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc.

Company Information

Name: Fourth Telco Channel Ltd

Save Changes

Company Type: Vendor

SIC Code: (6420) TELECOMMUNICATIONS

Registration Number: N/A

Turnover: 250000.00

Employees: 130

Credit Rating: 67

Credit Limit: 65000

Analysis Date: 21/09/2009

Addresses

ID	Name	Address	Post Code	Telephone
176	Head Office	Unit 3 Any Business	NG17 5JN	0115 963852

Files

Add File | View File

ID	Name	Type
45	user test.csv	Audited Accounts
44	P3.jpg	Management Accounts

Groups

ID	Name
25	Eddie Large
27	4th Telco Channel Enterprise

Providers

ID	Company ID	Name
21	100	Siemens Financial Services Ltd

Groups

ID	Name
25	Eddie Large
27	4th Telco Channel Enterprise
28	4th Telco Channel SME

Providers

ID	Company ID	Name
21	100	Siemens Financial Services Ltd
20	101	Henry Howard Finance PLC
67	130	NM Financial Services Ltd
68	131	Lend Finance PLC

Users

ID	User Name	Full Name	Job Title	Type
320	noah.ark@lease-desk.com	Noah Ark	Account Manager SME Sales Team	Normal
315	john.baptiste@lease-desk.com	John Baptiste	Managing Director	Main
321	bea.elzebub@lease-desk.com	Bea Elzebub	Account Manager	Normal

Products

Print Products

ID	Part Number	Name	Manufacturer
2383	85777548	JC Power Converter (NA)	Telco Manufacturer Ltd

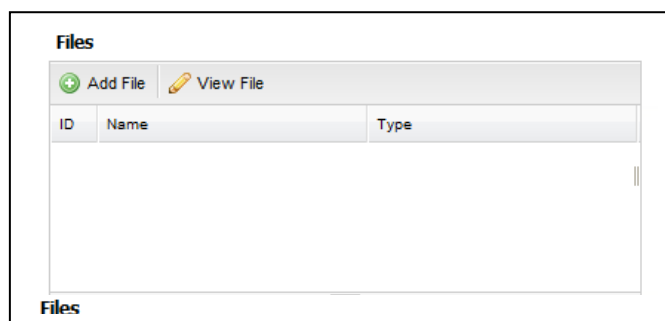
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider).

3.1. Adding and Viewing Files:

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

3.1.1. Adding a File:

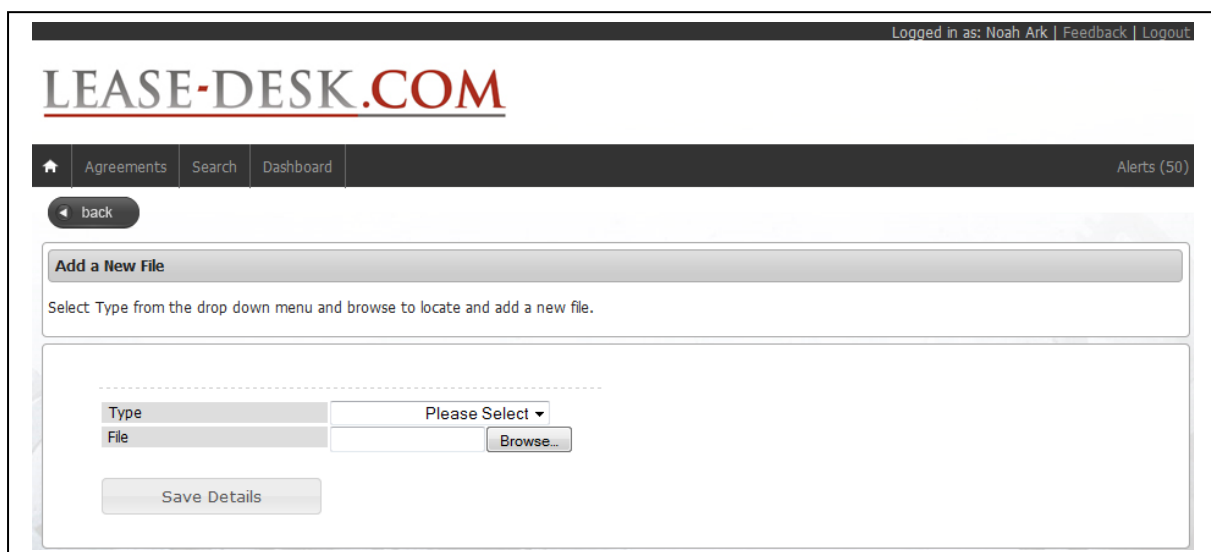
1. Go to the Files table within the homepage, as indicated below;



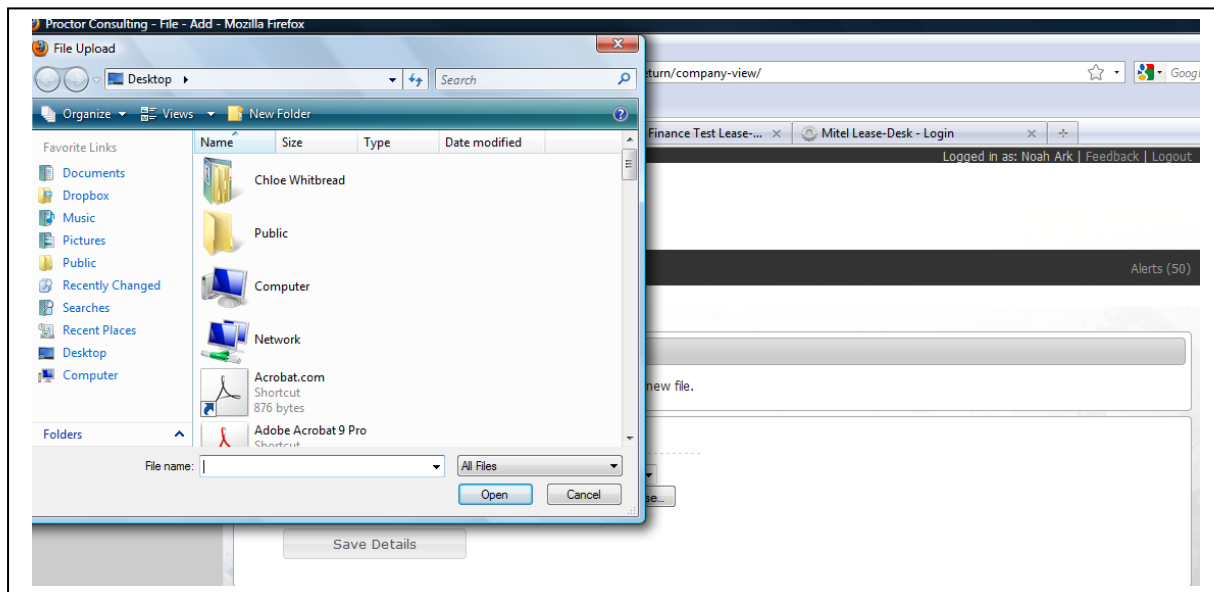
2. To add a file against your Company Details, click



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



4. Select a 'Type' from the drop down menu, for example, Credit Report, Management Accounts etc.
5. Click within the 'File' box and click on 'Browse' to look for the saved file from your PC, as indicated below;



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

Save Details

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

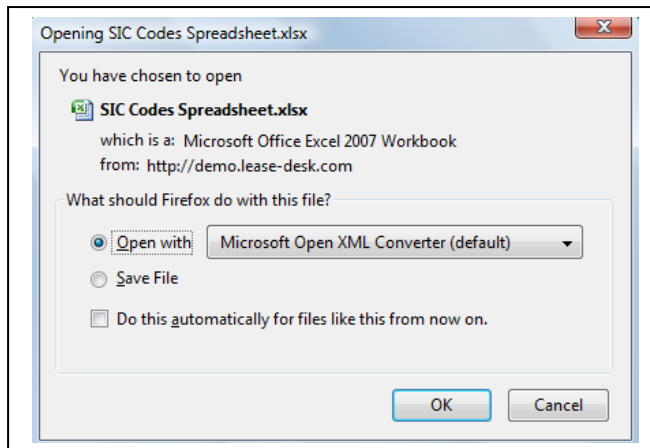


3.1.2. Viewing a File:

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

2. Click 

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

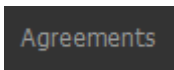


4. Click  to view the file.

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

4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select



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

This is indicated on the following page.

LEASE-DESK.COM

Agreements Search Dashboard Alerts (50)

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Agreement List

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

View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
1117		A A Manufacturing Ltd	Prospect	James Cook	0.00	
85		BC Insurance Services Ltd	End of Term	Keith Hutchinson	62250.00	01/09/2010
275	CMW05	BDE Logistics Ltd	Live	Pete Johnson	239148.55	30/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	592840.01	30/01/2011
725		Beta Healthcare Ltd	Live	Hannah Martin	3866.47	01/01/2013
613		Beta Healthcare Ltd	Prospect	Hannah Martin	0.00	
79	FOUR1001	Budget Hotel Ltd	Prospect	Sarah Barnes	0.00	
274	CMW04	CC Retail Ltd	Live	Michael Johns	23998.62	30/08/2012

Quick Search Company Search Clear

10 Page 1 of 3 Displaying 1 to 10 of 21 items

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

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

5. You will then be presented with the full 'View Agreement Details' screen.

(This is indicated on the following page).

Customer Information:

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

Contract Terms:

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

The Status 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 details the Financial Product information

Upgrade Options:

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

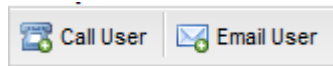
Product Information:

This lists the Product (s) within the agreement.

The screenshot displays the 'Normal Access User Manual' interface. It features several tabs: 'Customer', 'Companies', 'Contract Terms', 'Financial Product', 'Notes', 'Upgrade Options', 'Files', 'Products', and 'Audit Log'. The 'Customer' tab is active, showing fields for Credit Limit (500.00), Credit Rating (55), and Analysis Date (05/02/2007). The 'Contract Terms' tab shows fields for Internal Agreement Id (275), Agreement Identifier (CMW05), Payment Type (Arrears), Interest Rate (10.98%), Rate Per 1000 (21.73), and various payment profiles. The 'Upgrade Options' tab shows the RBO Level (222,972.64) and other financial details. The 'Companies' tab lists three companies: BDE Logistics Ltd, Bell Finance PLC, and Fourth Teloo Channel Ltd, each with a primary contact. The 'Financial Product' tab shows the Name (Minimum Period Rental Agreement), Notice (90), and Type (Finance Lease). The 'Files' tab shows a list of files. The 'Products' tab shows a table of products with columns for ID, Vendor, Part Number, Name, Manufacturer, Price, Quantity, and Value. The 'Audit Log' tab shows a table of audit entries with columns for Name, Date, and Action.

4.1.1 Calling or Emailing a Primary Contact:

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



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

A screenshot of the 'Add Call Note' screen in the LEASE-DESK.COM system. The page has a header with the company logo and navigation tabs for 'Agreements', 'Search', and 'Dashboard'. A 'back' button is located below the navigation. The main content area is titled 'Add Call Note' and includes a sub-header 'Add a note by adding details to the message box and clicking on Save.' Below this is a form with a table of details and a large text area for the message.

Company Name	BDE Logistics Ltd
User Name	Pete Johnson
Telephone Number	0116 2923000
Message	

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;

Logged in as: Noah Ark | Feedback | Logout

LEASE-DESK.COM

Home Agreements Search Dashboard Alerts (50)

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Add Email Note

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

Company Name	Siemens Financial Services Ltd
User Name	Martine Williams
Email	martine.williams@lease-desk.co
Populate	Blank ▼
Message	

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

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

4.1.2 Creating Follow Ups:

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

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

2. Click on



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

Logged in as: Noah Ark | Feedback | Logout

LEASE-DESK.COM

Home Agreements Search Dashboard Alerts (50)

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Add Calendar Note

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

Company Name	Fourth Telco Channel Ltd
User Name	Noah Ark
Subject	
Date	
Notes	Customer Name: BDE Logistics Ltd Agreement ID: 175 Contact: Noah Ark Tel: 0115 963852 Email: noah.ark@lease-desk.com Link: https://phase2.lease-desk.com/agreement/view/175/

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

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

6. Click

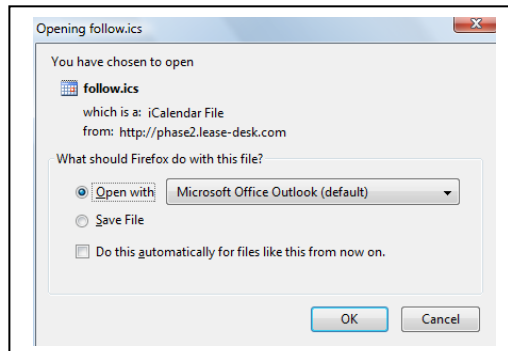
Open In Local Calendar

to open up your email or

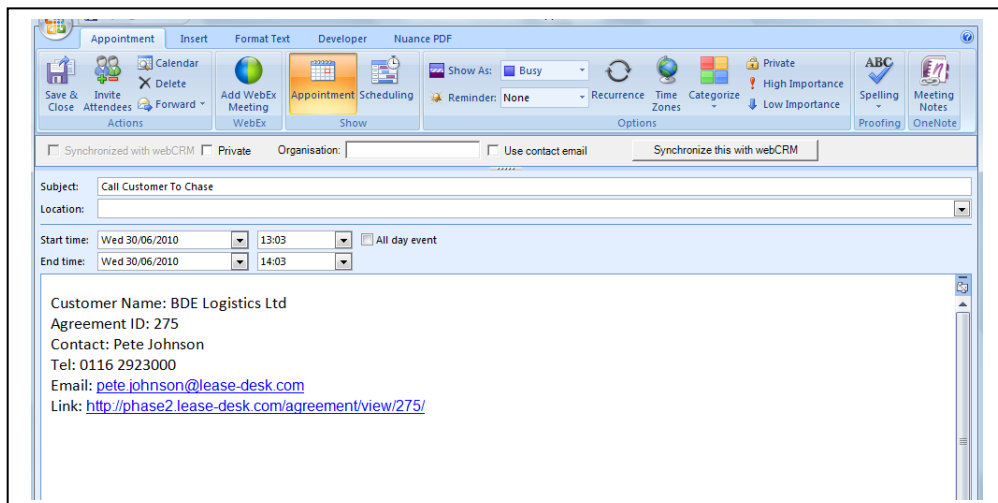
Save Details

to save the information added.

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



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



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

4.1.3 Adding and Viewing a File:

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

4.1.4 Viewing a Note:

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

Notes

+

Add Note

🔍

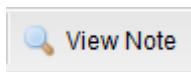
View Note

📄

Summarise

ID	Type	Name	Note	Date
454	Subject	Maths 4th	Enrolled David as payment date	2020/03/14 15:53:12

2. Highlight the note required and Click



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

Logged in as: Noah Ark | [Feedback](#) | [Logout](#)

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[Home](#)

[Agreements](#)

[Search](#)

[Dashboard](#)

Alerts (50)

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View Note

Full note details are detailed below.

Username

Noah Ark

Type

External

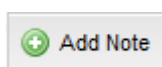
Message

Updated customer on progress

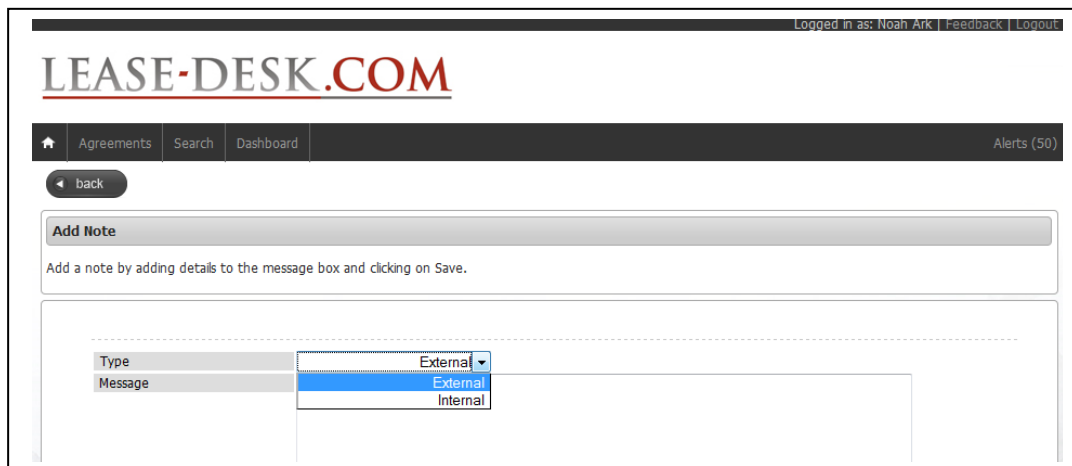
4.1.5 Adding a Note:

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

- ## 2. Click



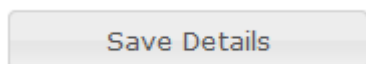
3. You will then be presented with the following 'Add Note' screen;



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

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

4. Type your message into the blank message box.

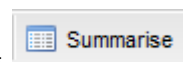


5. Click

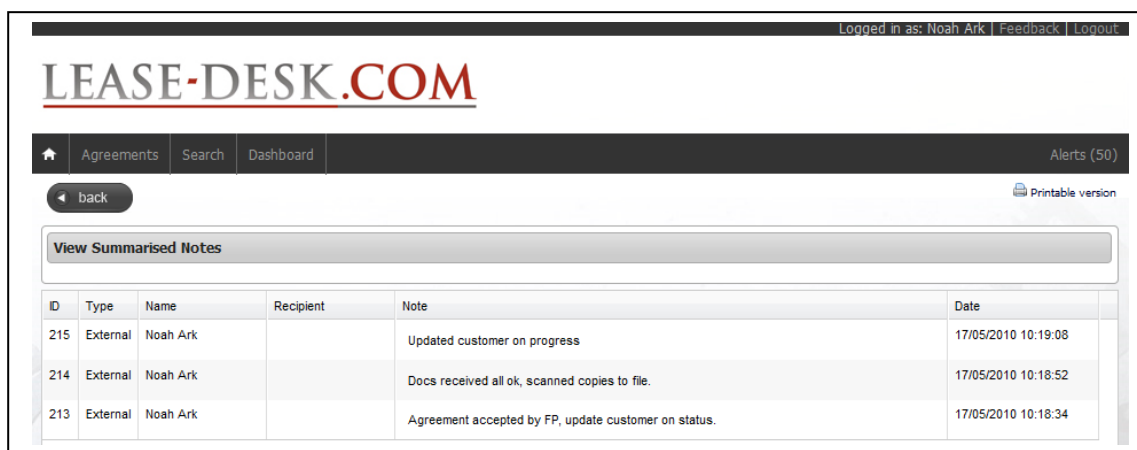
6. You will then be taken back to the main 'View Agreement' screen.

4.1.6 Summarising Notes:

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



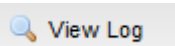
- You will then be presented with the following View Summarised Notes screen;

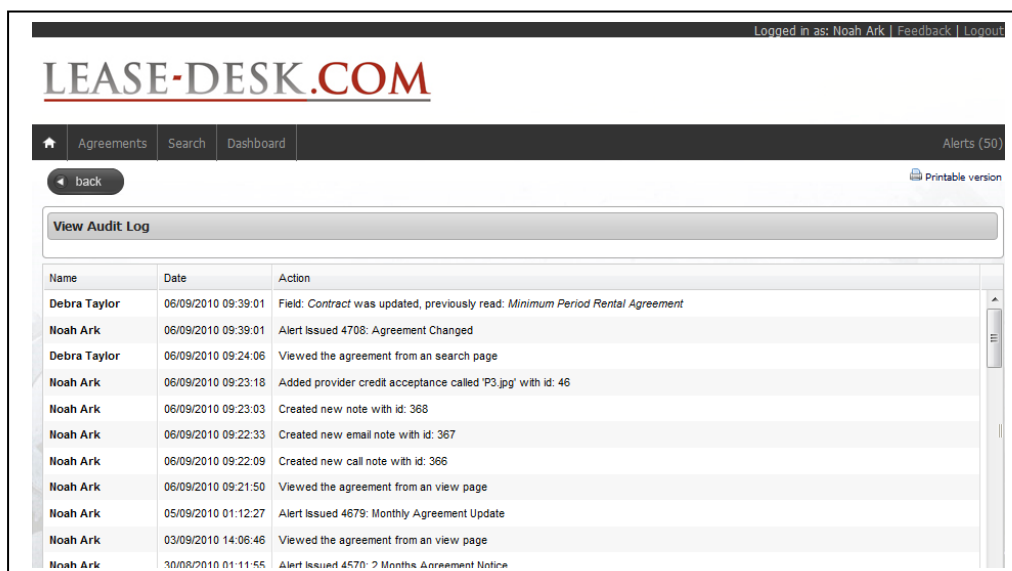


ID	Type	Name	Recipient	Note	Date
215	External	Noah Ark		Updated customer on progress	17/05/2010 10:19:08
214	External	Noah Ark		Docs received all ok, scanned copies to file.	17/05/2010 10:18:52
213	External	Noah Ark		Agreement accepted by FP, update customer on status.	17/05/2010 10:18:34

4.2. Viewing an Audit Log:

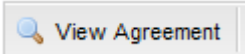
- There are two ways in which to view the Audit Log against an agreement;

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



Name	Date	Action
Debra Taylor	06/09/2010 09:39:01	Field: Contract was updated, previously read: Minimum Period Rental Agreement
Noah Ark	06/09/2010 09:39:01	Alert issued 4708: Agreement Changed
Debra Taylor	06/09/2010 09:24:06	Viewed the agreement from an search page
Noah Ark	06/09/2010 09:23:18	Added provider credit acceptance called 'P3.jpg' with id: 46
Noah Ark	06/09/2010 09:23:03	Created new note with id: 368
Noah Ark	06/09/2010 09:22:33	Created new email note with id: 367
Noah Ark	06/09/2010 09:22:09	Created new call note with id: 366
Noah Ark	06/09/2010 09:21:50	Viewed the agreement from an view page
Noah Ark	05/09/2010 01:12:27	Alert issued 4679: Monthly Agreement Update
Noah Ark	03/09/2010 14:06:46	Viewed the agreement from an view page
Noah Ark	30/08/2010 01:11:55	Alert issued 4570: 2 Months Agreement Notice

or

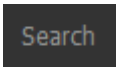
B) Select the Agreement required from the Agreement list and click  and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

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

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

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

5.0 Search:

1. Go to  on the top main menu.
2. You will be presented with the following 'Search Agreements' screen;

Logged in as: Noah Ark | Feedback | Log

LEASE-DESK.COM

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Search Agreements

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

Customer

Name

Agreement Status

All ▼

Prospect Status

All ▼

Search

Date Range

None ▼

From: Sep ▼ 2010 ▼ To: Sep ▼ 2010 ▼

Customer

Customer

All ▼

Filter

Add

Remove

Vendor

Vendor

All ▼

Filter

Add

Remove

Primary Contact

Contact

All ▼

Filter

Add

Remove

Group

Group

All ▼

Filter

Add

Remove

Provider

Product

Product

All ▼

Filter

Add

Remove

Agreement

Months Left

All ▼

RBO Level

All ▼

Customer Detail

Sic Code

All ▼

Filter

Add

Remove

Post Code

Post

All ▼

Filter

Add

Remove

Turnover

All ▼

Credit Limit

All ▼

Credit Rating

All ▼

Employees

All ▼

Output Type

Report

Default ▼

View Report

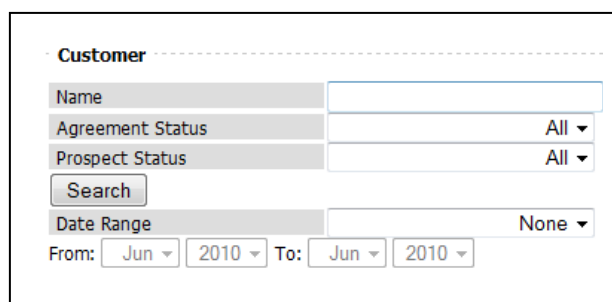
Export to CSV

Reset Form

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

5.1. Searching for Specific Customer Agreement Information:

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



Customer

Name

Agreement Status

Prospect Status

Date Range

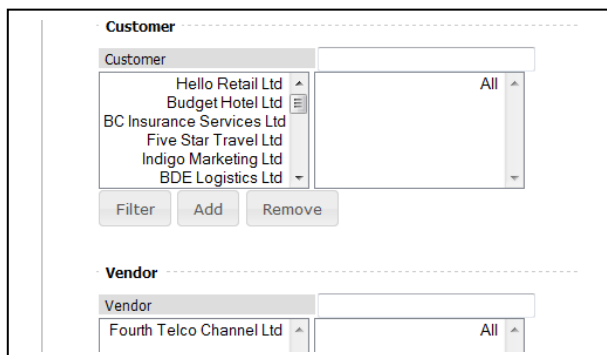
From: To:

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

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

3. Click

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



Customer

Customer

Vendor

Vendor

5. To include any of the produced data, within each table, highlight the required data, i.e.

Add

Primary Contact, and then click

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

Primary Contact

Contact

Noah Ark

All

Filter Add Remove

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

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

Turnover	All
Credit Limit	All
Credit Rating	All
Employees	All

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

Output Type

Report

View Report

Reset Form

Default

- Default
- Management Report
- Sales Report
- Marketing Report (Full Details)
- Marketing Report (Email)
- Marketing Report (Postal)
- Marketing Report (Contact Details)
- Prospect Report

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

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

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

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

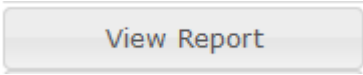
4. **Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.

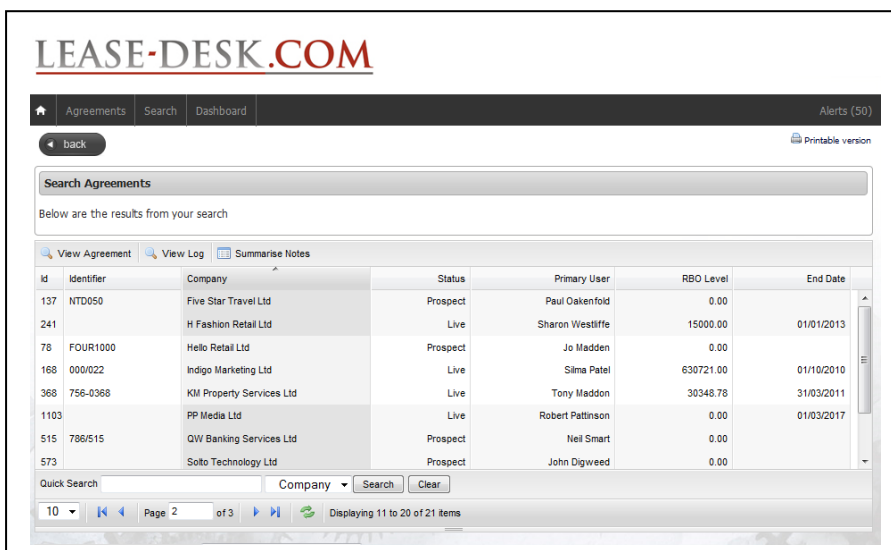
5. **Marketing Report (Postal):** As above, minus email but with full address details.

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

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

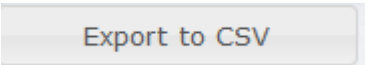
View Report

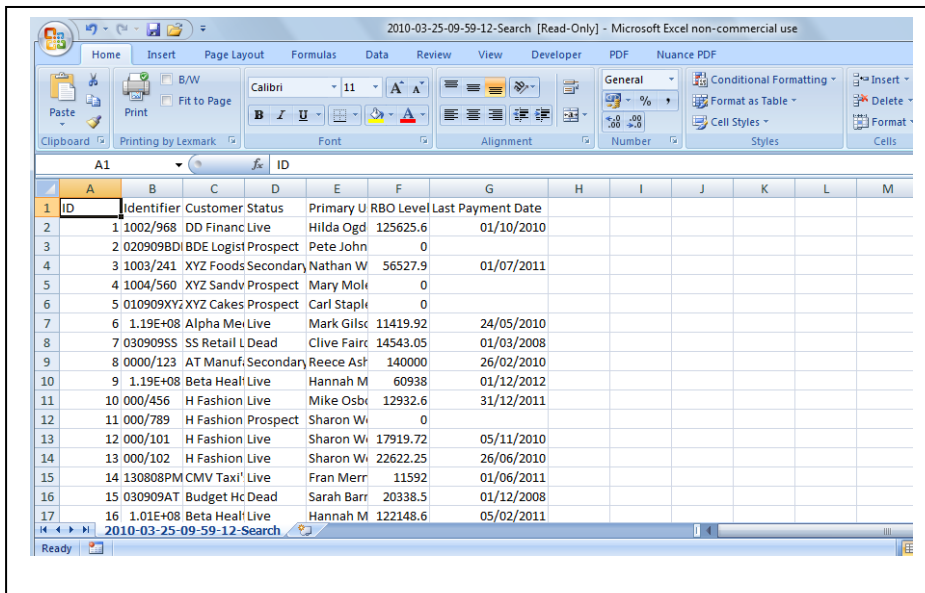
10. Once the report type has been selected, click on  and you will be presented with the data in the below format;



The screenshot shows the LEASE-DESK.COM web interface. At the top is the logo and navigation tabs: Agreements, Search, and Dashboard. A 'back' button and 'Printable version' link are also visible. The main section is titled 'Search Agreements' and displays a table of results. The table has columns for Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. Below the table is a 'Quick Search' section with a 'Company' dropdown, 'Search', and 'Clear' buttons. At the bottom, it shows 'Page 2 of 3' and 'Displaying 11 to 20 of 21 items'.

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
137	NTD050	Five Star Travel Ltd	Prospect	Paul Oakenfold	0.00	
241		H Fashion Retail Ltd	Live	Sharon Westliffe	15000.00	01/01/2013
78	FOUR1000	Hello Retail Ltd	Prospect	Jo Madden	0.00	
168	000/022	Indigo Marketing Ltd	Live	Silma Patel	630721.00	01/10/2010
368	756-0368	KM Property Services Ltd	Live	Tony Maddon	30348.78	31/03/2011
1103		PP Media Ltd	Live	Robert Pattinson	0.00	01/03/2017
515	786/515	QW Banking Services Ltd	Prospect	Neil Smart	0.00	
573		Solto Technology Ltd	Prospect	John Digweed	0.00	

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



ID	Identifier	Customer	Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ	Live	Hilda Ogd	125625.6	01/10/2010
2	020909BDI	BDE Logist	Prospect	Pete John	0	
3	1003/241	XYZ Foods	Secondary	Nathan W	56527.9	01/07/2011
4	1004/560	XYZ Sandv	Prospect	Mary Mol	0	
5	010909XYZ	XYZ Cakes	Prospect	Carl Stapl	0	
6	1.19E+08	Alpha Mei	Live	Mark Gilsc	11419.92	24/05/2010
7	030909SS	SS Retail	L Dead	Clive Fairc	14543.05	01/03/2008
8	0000/123	AT Manuf	Secondary	Reece Ash	140000	26/02/2010
9	1.19E+08	Beta Heal	Live	Hannah M	60938	01/12/2012
10	000/456	H Fashion	Live	Mike Osbr	12932.6	31/12/2011
11	000/789	H Fashion	Prospect	Sharon Wi	0	
12	000/101	H Fashion	Live	Sharon Wi	17919.72	05/11/2010
13	000/102	H Fashion	Live	Sharon Wi	22622.25	26/06/2010
14	130808PM	CMV Taxi	Live	Fran Merr	11592	01/06/2011
15	030909AT	Budget Hc	Dead	Sarah Barr	20338.5	01/12/2008
16	1.01E+08	Beta Heal	Live	Hannah M	122148.6	05/02/2011

5.2. Searching for all Customer Agreement Information:

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

2. Click 

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

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

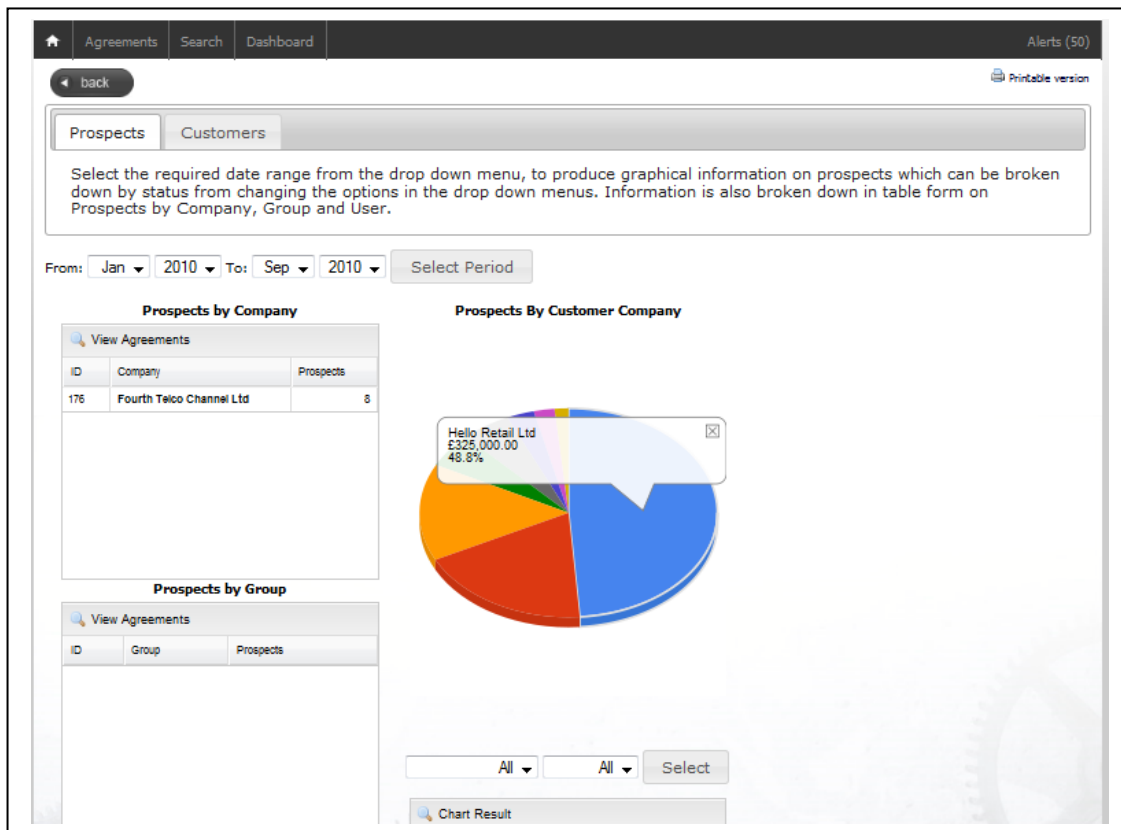
6. Dashboard:

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

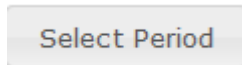
6.1. Prospects:

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

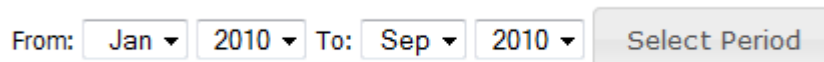
1. Go to **Dashboard** on the main top menu.
2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a default pie chart indicating Prospects by Customer Company, as indicated below;



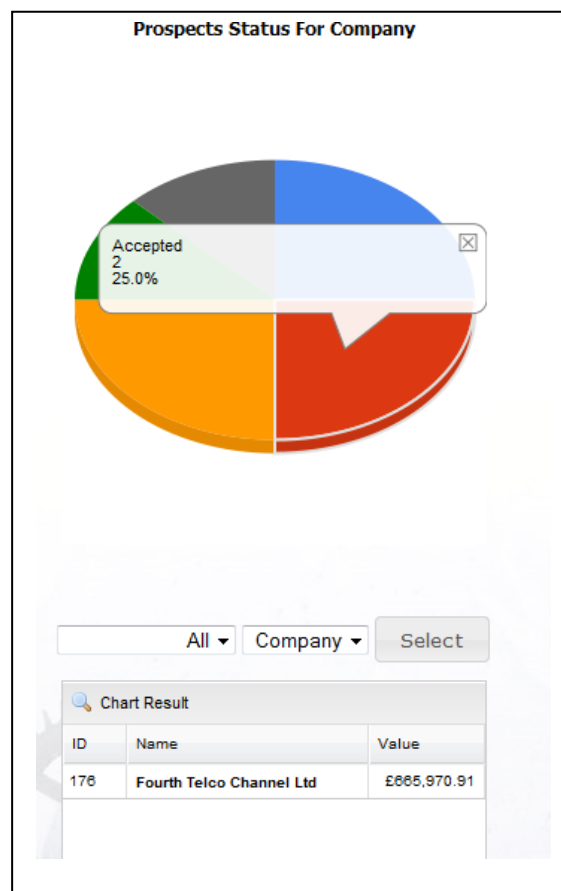
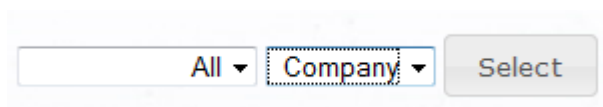
3. From the date range at the top of the page, select the required date and click



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



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



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

Prospects by Company

View Agreements

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

< prev next >

6. Alternatively, double click on the required line.

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

6.1.1 Viewing Top Prospect Information in Graphical Format:

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

All Company Select

All

None

Quote

Proposed

Referral

Accepted

Declined

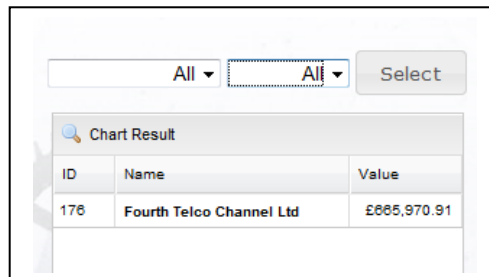
Purchase Order

Sent For Payment

Win

	Value
nnel Ltd	£665,970.91

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



The screenshot shows a web interface with two dropdown menus, both set to 'All', and a 'Select' button. Below them is a 'Chart Result' section containing a table with the following data:

ID	Name	Value
176	Fourth Telco Channel Ltd	£665,970.91

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

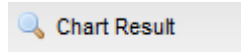


The screenshot shows a 'Chart Result' section with a table containing the same data as the previous screenshot:

ID	Name	Value
176	Fourth Telco Channel Ltd	£665,970.91

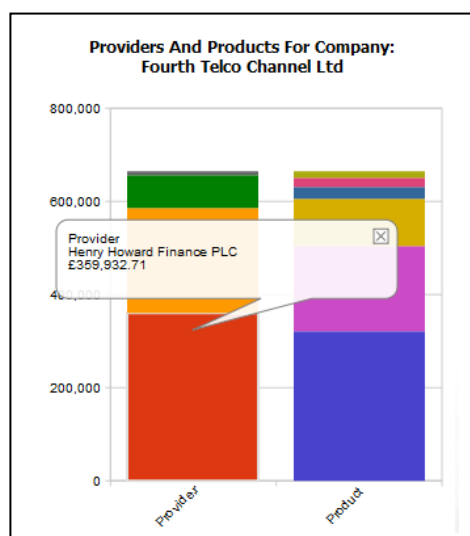
4. Highlight the individual line of information required; Company, User or Group.


5. To view the information in graphical format, click



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

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



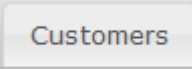
7. To View the Agreement information, highlight the line in the table below the graph and click  View Agreement



View Agreement			
ID	Name	Value	Provider
78	Hello Retail Ltd	£325,000.00	Henry Howard Finano
79	Protest Hotel Ltd	£124,995.00	Siemens Financial S

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

6.2. Customers:

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

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

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

Prospects Customers

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

Repeat Business Opportunity by Company

View Agreements

ID	Company	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

RBO By Company

Agreements Nearing End Of Term

View Agreement

ID	Company	RBO Value	Months Left
168	Indigo Marketing Ltd	£630,721.00	1
385	DP Manufacturing Ltd	£23,358.25	1
275	BDE Logistics Ltd	£239,148.55	2
175	BDE Logistics Ltd	£592,840.01	5
368	KM Property Services	£30,348.78	8

Repeat Business Opportunity by Group

View Agreements

ID	Group	Value
----	-------	-------

View Portfolio

All Select

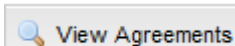
Please Select Display Graph

Top Repeat Business Opportunities

View Agreement

ID	Company	RBO Value	Customer RBO
168	Indigo Marketing Ltd	£630,721.00	£630,721.00

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;

Agreements Search Dashboard Alerts (30)

back Printable version

Repeat Business Opportunity by Company

Below are the results from your search

View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
275	CMW05	BDE Logistics Ltd	Live	Pete Johnson	239148.55	30/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	592840.01	30/01/2011
725		Beta Healthcare Ltd	Live	Hannah Martin	3866.47	01/01/2013
274	CMW04	CC Retail Ltd	Live	Michael Johns	23998.62	30/08/2012
385	756-0385	DP Manufacturing Ltd	Live	Fred Taylor	23358.25	01/10/2010
885	IMTE029	EFG Logistics Ltd	Live	Cam Gidanti	26601.51	01/07/2012
241		H Fashion Retail Ltd	Live	Sharon Westiffe	15000.00	01/01/2013
168	000/022	Indigo Marketing Ltd	Live	Silma Patel	630721.00	01/10/2010

Quick Search Company Search Clear

10 Page 1 of 1 Displaying 1 to 10 of 10 items

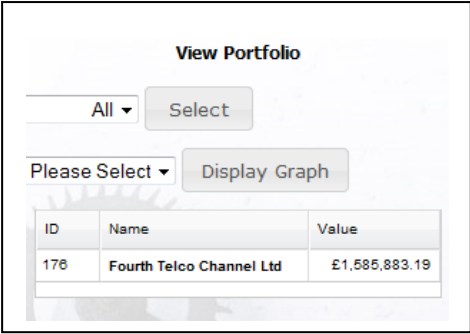
Report Default View Report Export to CSV

Total	Amount
RBO	1,585,883.19

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

6.2.1 Viewing/Amending Portfolio Information:

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



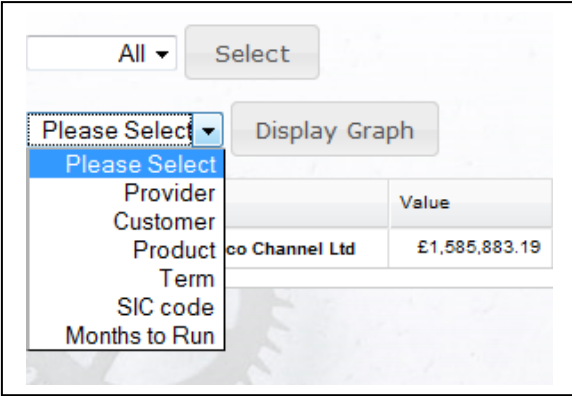
ID	Name	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

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

3. Click 

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

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



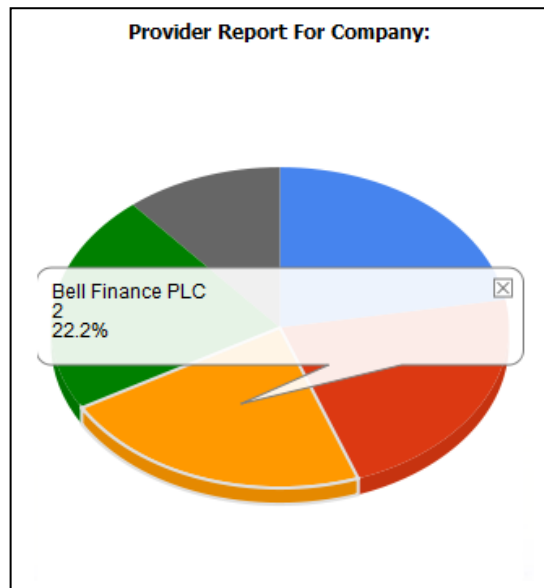
ID	Name	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

6. Highlight the required row from the table and click

Display Graph

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

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



7. Alerts:

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

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

The Alert Triggers are as follows;

- When a new Agreement is added to the system as a Live, or Prospect contract.
- When a Prospect changes to a Live customer (The vendor will be emailed in reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through its term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.
- One month before an agreement reaches its end of term; in order to notify the customer that they need to provide written confirmation to the Financial Provider if cancelation is required.
- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

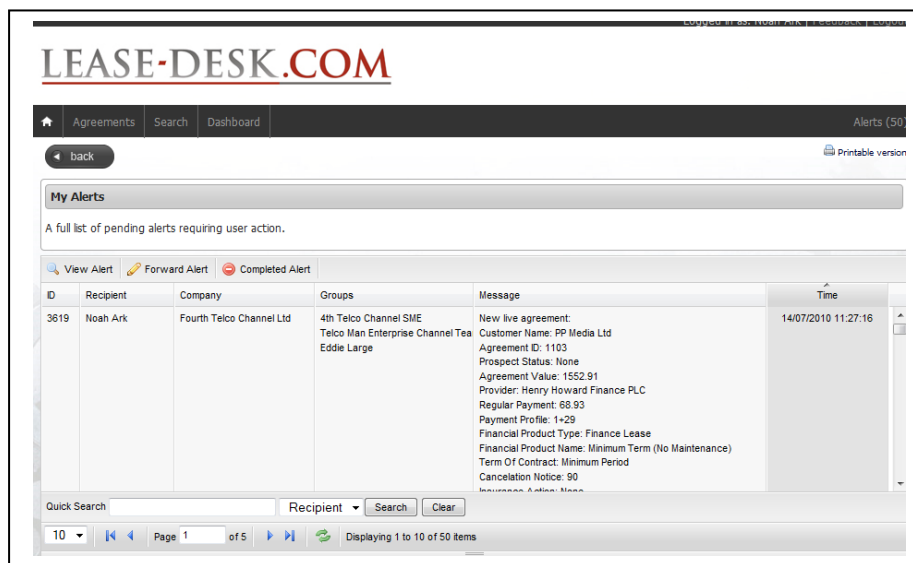
Note: Emails generated go out on the hour and every, 15, 30, 45 minutes past the hour.

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

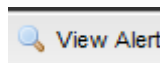
7.1 Viewing Alerts:

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

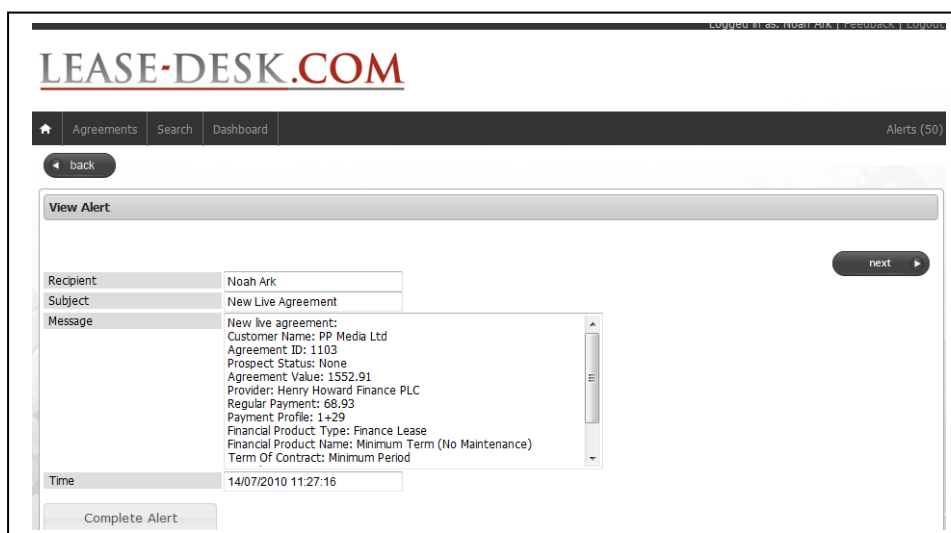
2. You will then be presented with the following 'My Alerts' screen as per the following page;



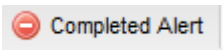
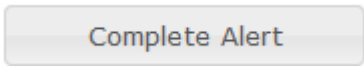
3. To view an alert, highlight the required alert and click



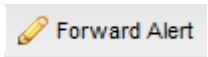
4. You will then be presented with the following screen;

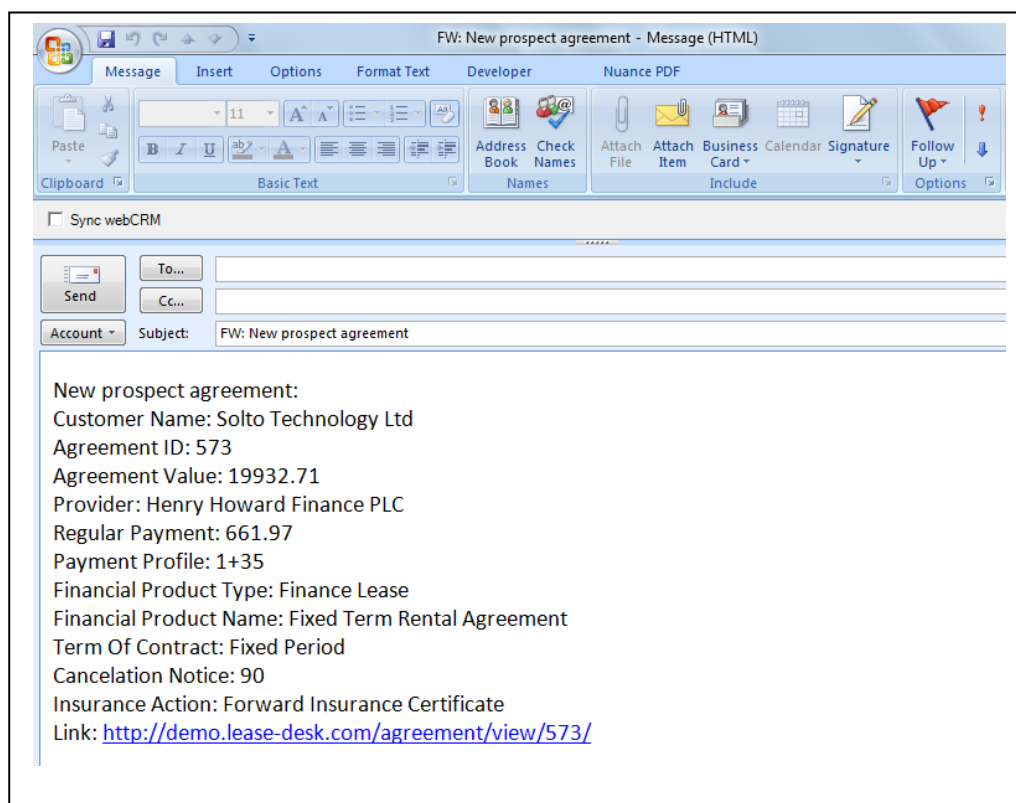


7.2 Completing Alerts:

1. Once the alert has been read and the action has been taken, click  from the main alert list view or  from the 'View Alert' Screen.

7.3 Forwarding Alerts:

1. From the 'My Alerts' main view, highlight the required alert and click .
2. The alert will then be created in mail format allowing you to forward to the relevant contact as per below;

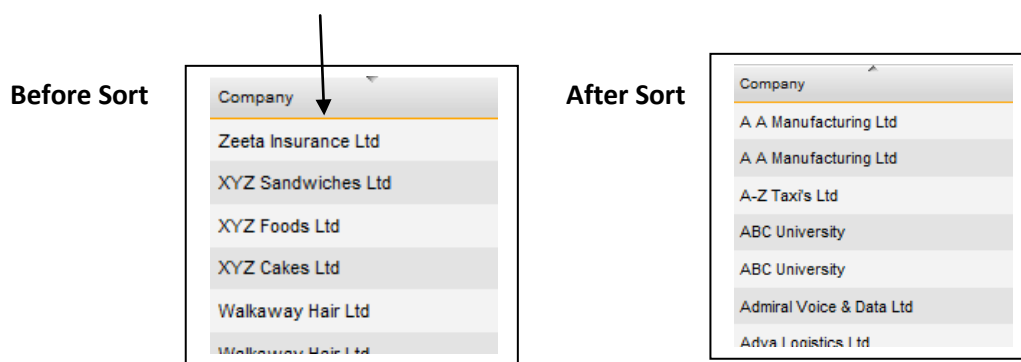


8. General Functionality:

8.1. Sort:

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

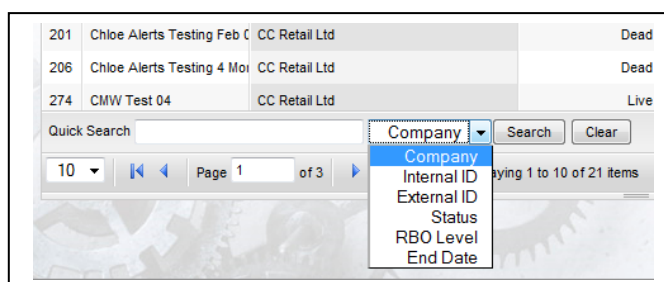
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.

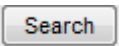


8.2 Quick Search:

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

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



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

274	CMW Test 04	CC Retail Ltd	Live
202	Chloe Alerts Testing 9 Feb	CC Retail Ltd	Live
201	Chloe Alerts Testing Feb C	CC Retail Ltd	Dead
413	RBO TEST	CC Retail Ltd	Live

Quick Search

Company

10


Page 1

of 1

Displaying 1 to 5 of 5 items





3. Click  to start from the beginning.

8.3 Refresh:

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

8.4 Scrolling through records:

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

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

8.5 Changing the amount of records per view:

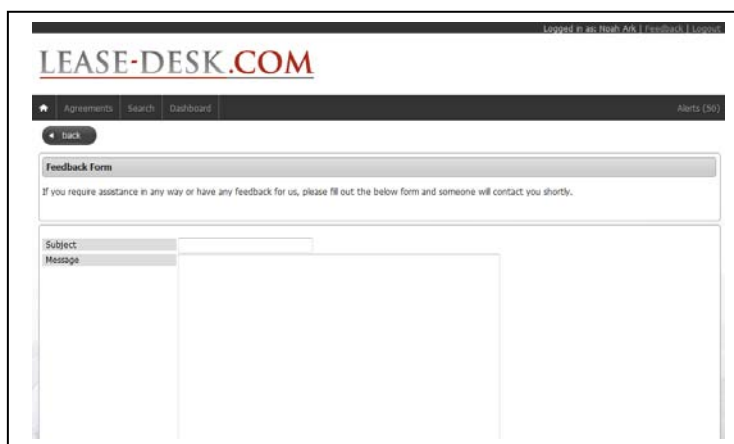
2. At the bottom of each table, select the drop down list to change the number of records viewed on a page at a time, as per below.



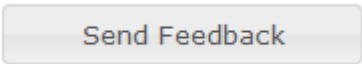
9. Feedback:

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

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



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



4. Once completed, click

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

Feedback Form: Complete

Thank you for completing the feedback form

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

10. Frequently Asked Questions:

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

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

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

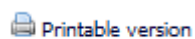
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

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

Either contact Proctor Consulting at the email address or phone number above, or speak to the person who is a 'main' user at your site as they will have editing rights on this page.

4. How do I print out the notes on an agreement?

When you go to the 'Summarise Notes' screen within an agreement, click on the following icon;



to print in a suitable format. You will see this icon in other areas of the system as well.

11. Contact Details:

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

Proctor Consulting UK Ltd,
Lakeview Drive,
Sherwood Business Park,
NG15 0DT

Switchboard: 01302 245310
Email: info@Lease-Desk.com
www.Lease-Desk.com