

LEASE-DESK

# Normal Access User Manual

## Version 1.0



DRIVING  
SALES AND  
PROFITABILITY

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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 Technology 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 Sales Managers 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.

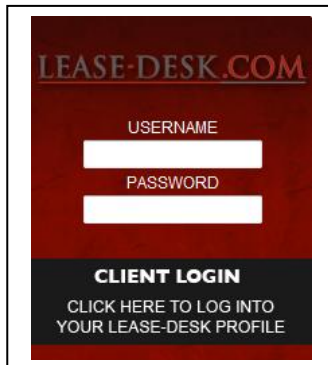
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

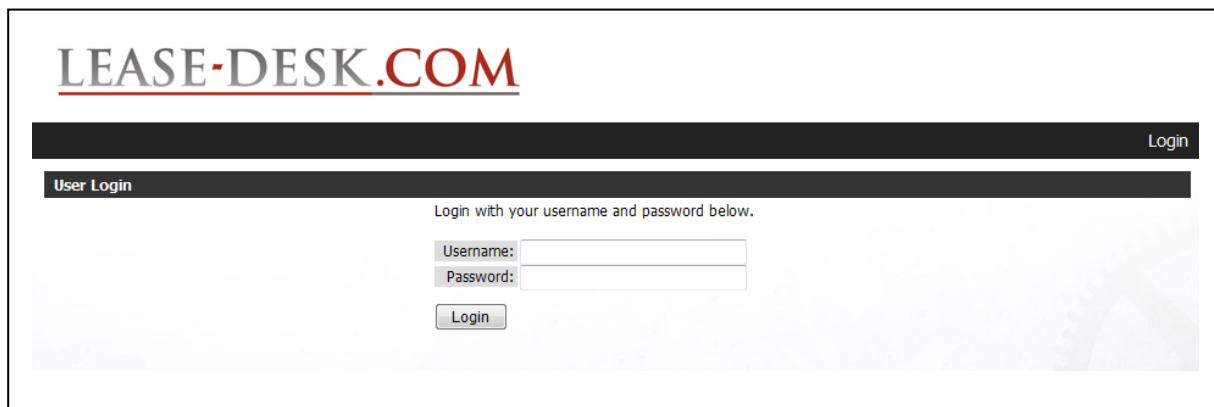
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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


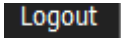
## 2. Logging into Lease-Desk:

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



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



3. Enter your details and click on .
4. To Log Out, select  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 indicated in two parts below;

LEASE-DESK.COM

Logged in as: Winston Armani

Home Agreements Search Dashboard
Feedback Alerts (0) Logout

← back

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

**Company Information**

Name

Company Type

SIC Code

Turnover

Employees

Credit Rating

Credit Limit

Analysis Date

**Addresses**

| ID | Name              | Address                | Post Code | Telephone     |
|----|-------------------|------------------------|-----------|---------------|
| 93 | 2 The High Street | 2 The High Street, Lee | LS1 5FF   | 0113 700 0000 |

**Files**

➕ Add File 🔍 View File

| ID | Name | Type |
|----|------|------|
|----|------|------|

**Providers**

| ID | Company ID | Name                           |
|----|------------|--------------------------------|
| 6  | 100        | Siemens Financial Services Ltd |
| 4  | 101        | Henry Howard Finance PLC       |

**Users**

| ID  | User Name                     | Full Name      | Job Title                | Type   |
|-----|-------------------------------|----------------|--------------------------|--------|
| 169 | winston.armani@lease-desk.com | Winston Armani | Account Manager          | Normal |
| 170 | mark.bell@lease-desk.com      | Mark Bell      | Account Manager          | Normal |
| 167 | paul.cabourn@lease-desk.com   | Paul Cabourn   | Sales Director           | Main   |
| 168 | john.jeffries@lease-desk.com  | John Jeffries  | Enterprise Sales Manager | Normal |

**Products**

| Id | Part Number | Name               | Manufacturer |
|----|-------------|--------------------|--------------|
| 10 | 50005180    | 3300 AX Controller | Mitel        |
| 11 | 54002950    | 3300 MLPP Licence  | Mitel        |

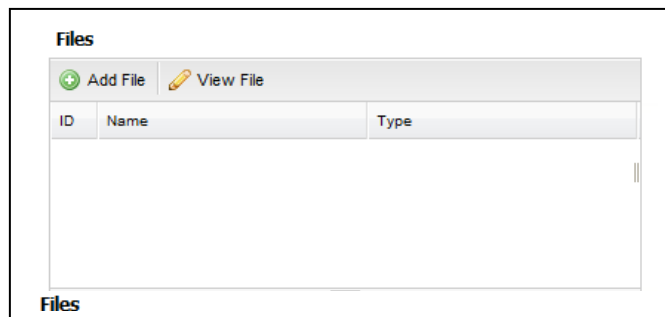
2. This screen details information relating to your company such as Addresses, Files, Users, Products (if you are a Vendor), and Financial Products (if you are a Financial Provider).

### 3.1. Adding and Viewing Files:

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

#### 3.1.1. Adding a File:

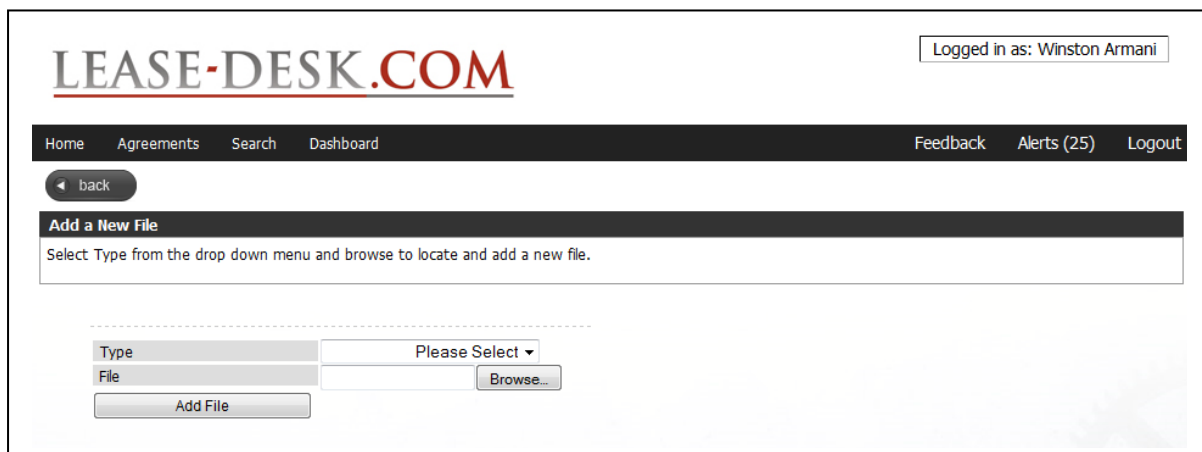
1. Go to the Files table within the homepage, as indicated below;



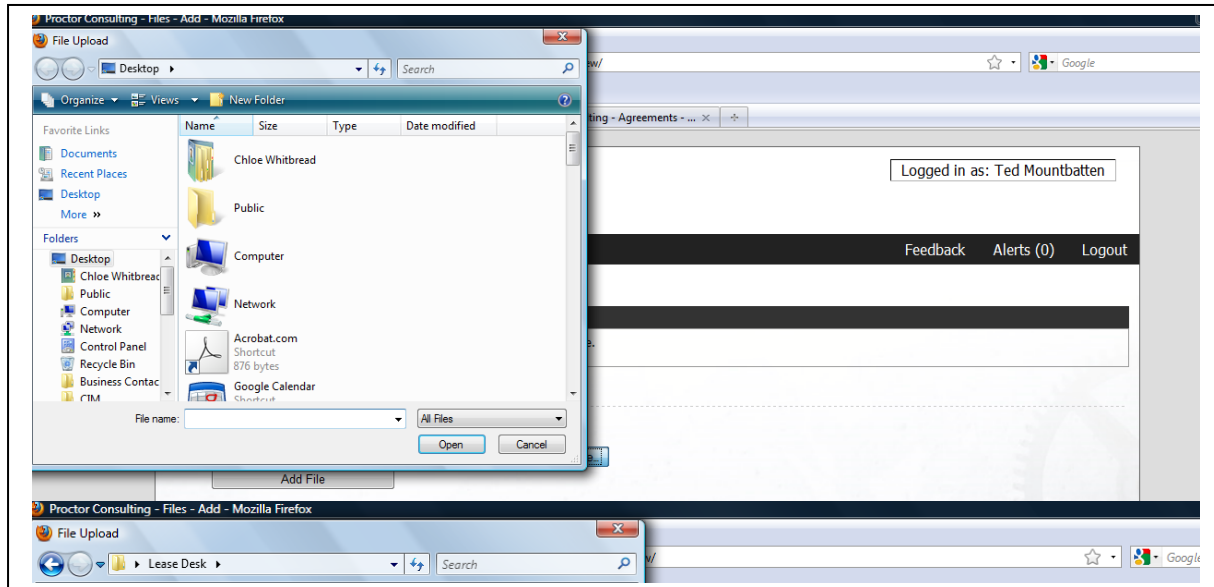
2. To add a file against your Company Details, click



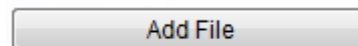
3. You will then be presented with the 'Add a New File' screen as indicated below;



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



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



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



### 3.1.2. Viewing a File:

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

2. Click 

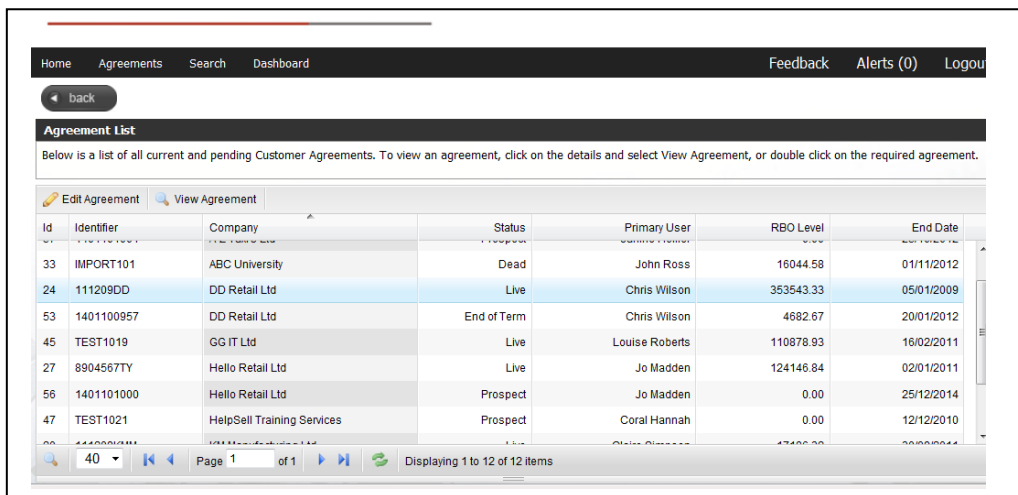
## 4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log

### 4.1. Viewing an Agreement:

1. From the top toolbar menu, select

Agreements

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).



| Id | Identifier | Company                    | Status      | Primary User   | RBO Level | End Date   |
|----|------------|----------------------------|-------------|----------------|-----------|------------|
| 33 | IMPORT101  | ABC University             | Dead        | John Ross      | 16044.58  | 01/11/2012 |
| 24 | 111209DD   | DD Retail Ltd              | Live        | Chris Wilson   | 353543.33 | 05/01/2009 |
| 53 | 1401100957 | DD Retail Ltd              | End of Term | Chris Wilson   | 4682.67   | 20/01/2012 |
| 45 | TEST1019   | GG IT Ltd                  | Live        | Louise Roberts | 110878.93 | 16/02/2011 |
| 27 | 8904567TY  | Hello Retail Ltd           | Live        | Jo Madden      | 124146.84 | 02/01/2011 |
| 56 | 1401101000 | Hello Retail Ltd           | Prospect    | Jo Madden      | 0.00      | 25/12/2014 |
| 47 | TEST1021   | HelpSell Training Services | Prospect    | Coral Hannah   | 0.00      | 12/12/2010 |

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

4. Click

View Agreement

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



Home
Agreements
Search
Dashboard
Feedback
Alerts (0)
Logout

back

**View Agreement**  
All Agreement details for the selected customer can be found below.

**Contract Terms**

|                          |               |
|--------------------------|---------------|
| Agreement Identifier     |               |
| Payment Type             | Advance       |
| Rate                     | Interest Rate |
| Interest Rate            | 11.00%        |
| Rate Per 1000            | 31.88         |
| Profile: Initial Payment | 3             |
| Profile: Regular Payment | 33            |
| Payment Frequency        | Monthly       |
| Initial Payment          | 5,953.59      |
| Regular Payment          | 1,984.53      |
| First Payment Date       | 30/09/2008    |
| Status                   | Live          |
| Prospect                 | None          |
| Expected Close Date      |               |

**Companies**

| Name                           | User             | Type     |
|--------------------------------|------------------|----------|
| BC Insurance Services Ltd      | Keith Hutchinson | Customer |
| Siemens Financial Services Ltd | Martine Williams | Provider |
| Fourth Telco Channel Ltd       | Noah Ark         | Vendor   |

**Financial Product**

| Name                        | Notice | Type          |
|-----------------------------|--------|---------------|
| Fixed Term Rental Agreement | 0      | Finance Lease |

**End of Term**

|                  |      |
|------------------|------|
| Secondary Rental | 0.00 |
| Residual Value   | 0.00 |

**Products**

| ID    | Vendor     | Name                        | Price  | Quantity | Value    |
|-------|------------|-----------------------------|--------|----------|----------|
| 6     | Second Tel | Additional Pretend Part B   | 225.00 | 80       | 18000.00 |
| 25    | Second Tel | Any Call Recording Software | 280.99 | 10       | 2809.90  |
| Total |            |                             |        |          | 20809.90 |

**Upgrade Options**

|                  |                  |
|------------------|------------------|
| <b>RBO Level</b> | <b>13,202.63</b> |
| Periods Left     | 1                |
| Settlement       | 7,607.27         |
| Last Payment     | 01/07/2010       |
| Last Notice      | 02/04/2010       |
| Capital Amount   | 20,809.90        |

**Files**

Add File
View File

| ID | Name | Type |
|----|------|------|
|----|------|------|

**Notes**

4. You are then presented with various tables you are able to edit, i.e. Contract Terms, Files, Notes, etc.

#### Note: Upgrade Options:

The RBO Level in bold (Repeat Business Opportunity) is the amount the customer has to spend on a technology refresh that will tie them into a new contract with the Vendor for the same length of time as their initial contract.

5. Once details have been amended, click

Save Changes

#### 4.1.1 Adding and Viewing a File:

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

|                |            |
|----------------|------------|
| RBO Level      | 183,907.70 |
| Periods Left   | -1         |
| Settlement     | 36,907.70  |
| Last Payment   | 14/02/2009 |
| Last Notice    | 14/02/2009 |
| Capital Amount | 147,000.00 |

**Files**

[Add File](#)
[View File](#)

| ID | Name | Type |
|----|------|------|
|    |      |      |
|    |      |      |
|    |      |      |

**Notes**

[Add Note](#)

| ID | Name | Note | Date |
|----|------|------|------|
|    |      |      |      |
|    |      |      |      |
|    |      |      |      |

#### 4.1.2 Viewing a Note:

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



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

LEASE-DESK.COM

Logged in as: Eddie Large

Home Agreements Search Dashboard Feedback Alerts (46) Logout

back

**View Note**


Full note details are detailed below.

|          |  |
|----------|--|
| Username | Mike Versace   |
| Message  | Agreement reaches 5 months to run on the 26/02/2010 need to contact the customer |

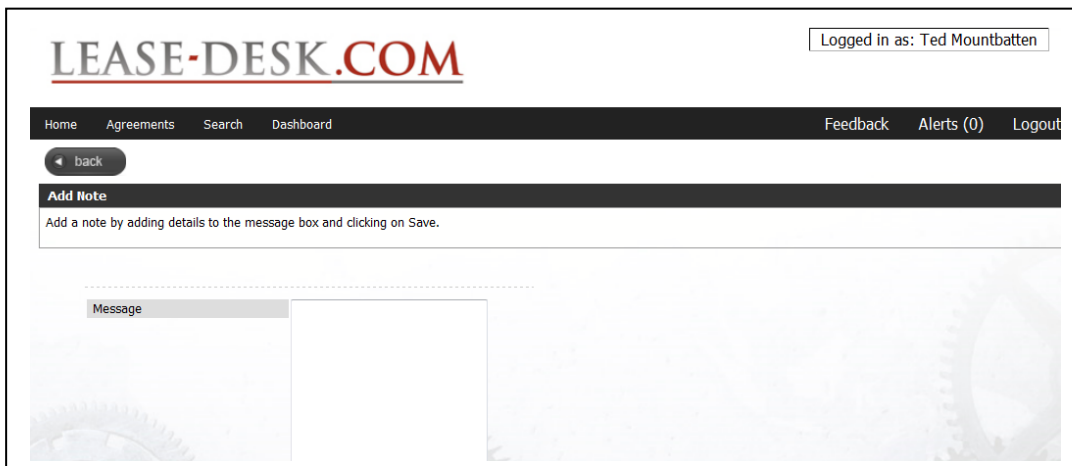
#### 4.1.3 Adding a Note:

**Note:** When you add a note to an Agreement, an email alert will get generated to all members associated with the Agreement.

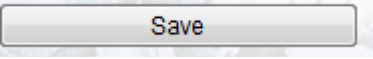
1. Within the main 'View Agreement' screen, go to the Notes table.

2. Click 

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




3. Type your message into the blank box

4. Click 

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

#### 4.1.4 Viewing an Internal Note:

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

2. Click 

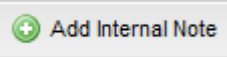
3. You will then be presented with the 'View an Internal Note' screen which will provide all details of which user added the note and when, as indicated below;

The screenshot shows the 'View an Internal Note' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Eddie Large' is on the right. Below the logo is a navigation bar with links: Home, Agreements, Search, Dashboard, Feedback, Alerts (46), and Logout. A 'back' button is visible. The main heading is 'View Note'. Below it, a message states 'Full note details are detailed below.' The note details are displayed in a table-like format:

|          |  |
|----------|--|
| Username | Eddie Large  |
| Message  | Spoke to Louise, she will forward over the details required. |

#### 4.1.5 Adding an Internal Note:

1. Go to the Internal Notes table within the 'Edit an Agreement' screen.

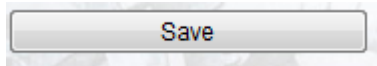
2. Click  Add Internal Note

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

The screenshot shows the 'Add Internal Note' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Eddie Large' is on the right. Below the logo is a navigation bar with links: Home, Agreements, Search, Dashboard, Feedback, Alerts (46), and Logout. A 'back' button is visible. The main heading is 'Add Internal Note'. Below it, a message states 'Add a note by adding details to the message box and clicking on Save.' The form consists of a 'Message' label and a large text input area. At the bottom left, there is a 'Save' button.

4. Enter your message in the box.

5. Click

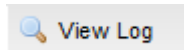


6. You will then be taken back to the main 'Edit Agreement' Screen.

## 4.2. Viewing an Audit Log:

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

2. Click



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

LEASE-DESK.COM

Logged in as: Eddie Large

Home Agreements Search Dashboard Feedback Alerts (46) Logout

back

**View Audit Log**

| Name            | Date                | Action  |
|-----------------|---------------------|---|
| Chloe Whitbread | 2010-02-09 07:55:37 | Field: Status was updated, previously read: Secondary Period  |
| Chloe Whitbread | 2010-02-05 15:14:15 | Field: Status was updated, previously read: Live  |
| Chloe Whitbread | 2010-02-05 08:41:23 | Field: Status was updated, previously read: Prospect  |
| Debra Taylor    | 2010-02-01 08:50:56 | Field: Payment Type was updated, previously read: start<br>Field: Interest Rate was updated, previously read: 11<br>Field: Created was updated, previously read: 2010-01-31 |
| Debra Taylor    | 2010-01-28 16:31:28 | Removed product with id: 687, Vendor: Eddie Large (Telco Manufacturer Ltd), Product: Imaginary Part 1 1 0.00  |
| Chloe Whitbread | 2010-01-27 16:40:19 | User created product with id: 687   |
| Ted Mounthatten | 2010-01-26 13:04:25 | Field: Payment Type was updated, previously read: start   |

## 5.0 Search:

1. Go to **Search** on the top main menu.
2. You will be presented with the 'Search Agreements' screen as indicated below in two parts;

### 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

Customer Status
All

Agreement Status
All

Prospect Status
All

Search

#### Customer

Add
Remove

#### Primary Contact

#### Product

Name

Filter
Add
Remove

#### Agreement

Months Left
All

RBO Level
All

#### Customer Detail

SIC Code

Add
Remove

#### Primary Contact

Add
Remove

#### Group

Add
Remove

#### Provider

Filter
Add
Remove

#### Post Code

Post

Filter
Add
Remove

Turnover
All

Credit Limit
All

Credit Rating
All

Employees
All

#### Output Type

Report
Default

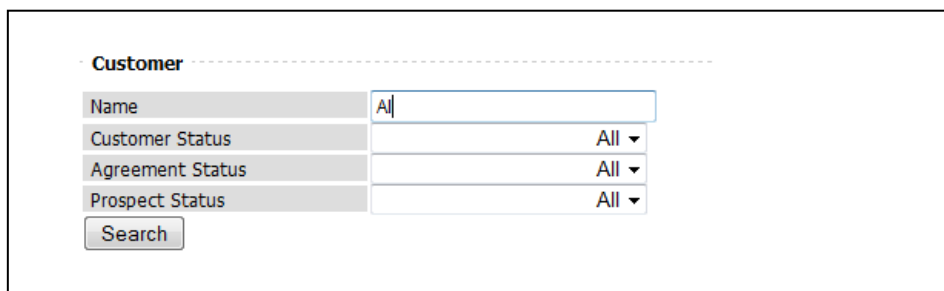
View Report
Export to CSV

Reset Form

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

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

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



The screenshot shows a search interface with the following elements:

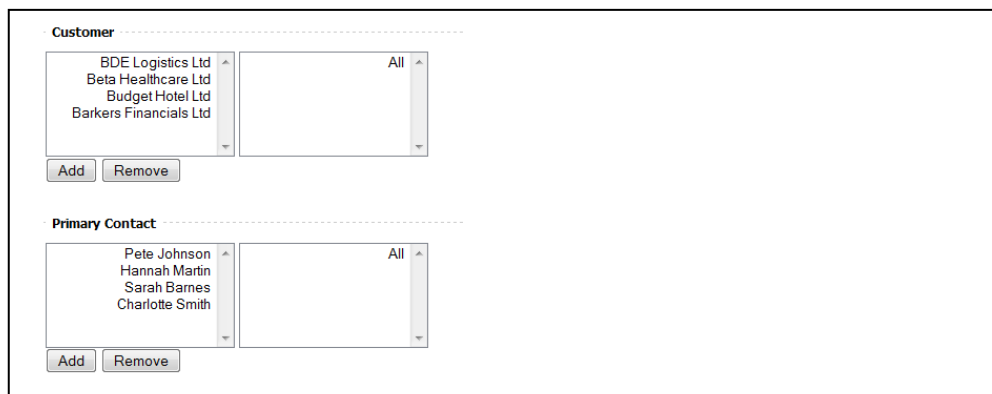
- Customer** (Section Header)
- Name**: A text input field containing 'Al'.
- Customer Status**: A dropdown menu set to 'All'.
- Agreement Status**: A dropdown menu set to 'All'.
- Prospect Status**: A dropdown menu set to 'All'.
- Search**: A button to execute the search.

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

- Agreement Status
- Prospect Status (if previous Status is set to Prospect)

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;



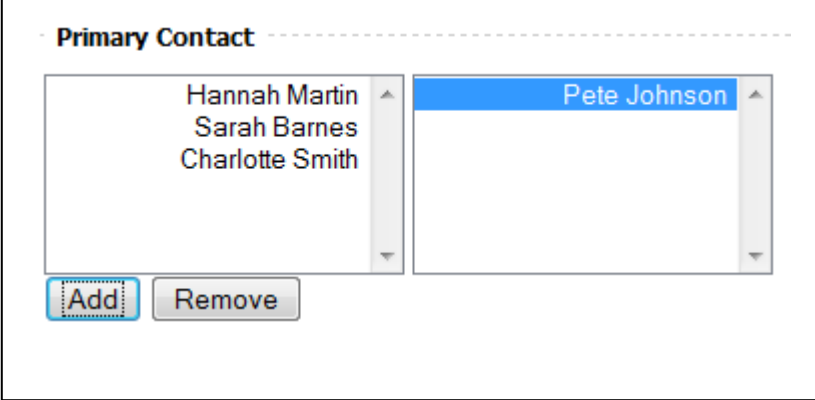
The screenshot shows the search results interface with the following elements:

- Customer** (Section Header)
- Customer List**: A list of companies: BDE Logistics Ltd, Beta Healthcare Ltd, Budget Hotel Ltd, Barkers Financials Ltd.
- Customer Status**: A dropdown menu set to 'All'.
- Add** and **Remove** buttons.
- Primary Contact** (Section Header)
- Primary Contact List**: A list of names: Pete Johnson, Hannah Martin, Sarah Barnes, Charlotte Smith.
- Primary Contact Status**: A dropdown menu set to 'All'.
- Add** and **Remove** buttons.

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;



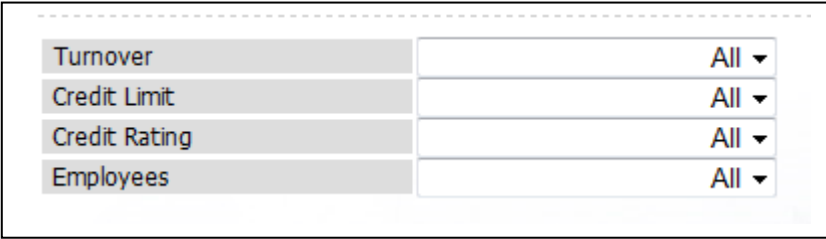
**Primary Contact**

|  |              |
|--|--------------|
| Hannah Martin<br>Sarah Barnes<br>Charlotte Smith | Pete Johnson |
|--|--------------|

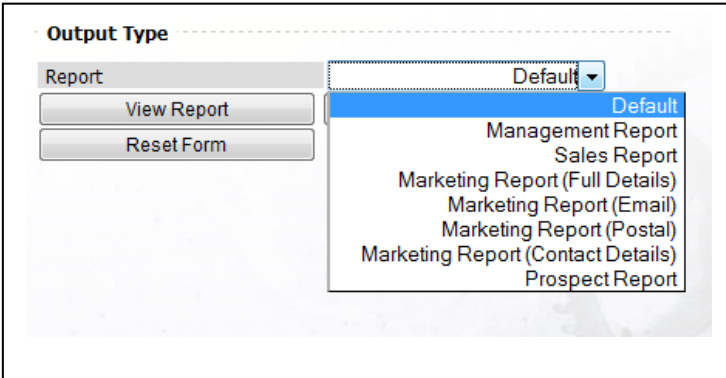
7. Carry on with each table required, following the previous step.

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




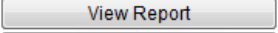
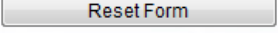
|               |       |
|---------------|-------|
| Turnover      | All ▼ |
| Credit Limit  | All ▼ |
| Credit Rating | All ▼ |
| Employees     | All ▼ |

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



**Output Type**

Report: 

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



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

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

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

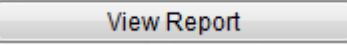
3. **Marketing Report (Full Details):** With all details listed below.

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

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

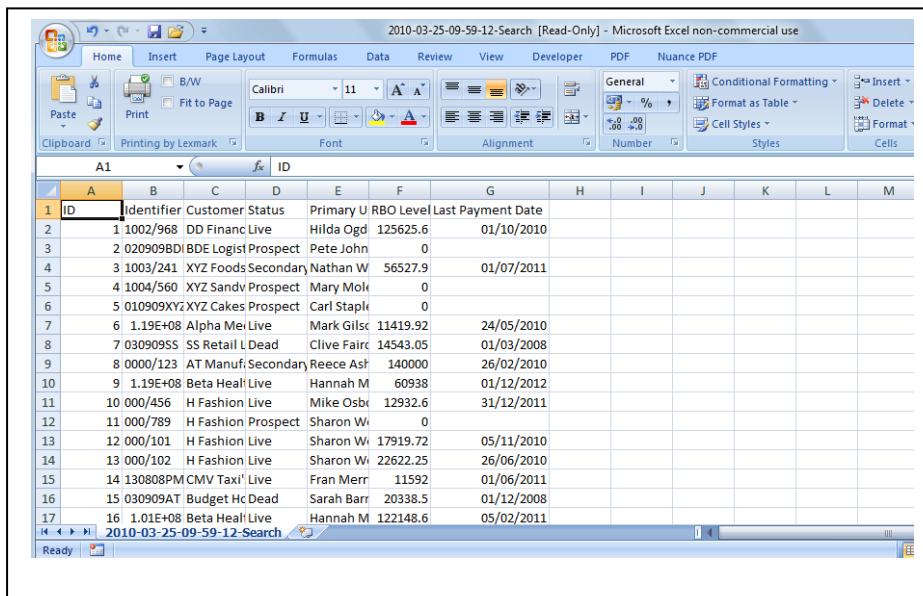
6. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the 'Output Type', and select a report type from the drop down menu.

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

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

| Search Agreements  |                       |                          |          |          |          |                          |                                   |
|--|-----------------------|--------------------------|----------|----------|----------|--------------------------|-----------------------------------|
| Below are the results from your search   |                       |                          |          |          |          |                          |                                   |
| <a href="#">Add Agreement</a> <a href="#">Edit Agreement</a> <a href="#">Delete Agreement</a> <a href="#">View Agreement</a> <a href="#">Edit Calculation</a> <a href="#">View Log</a> |                       |                          |          |          |          |                          |                                   |
| ID   | Customer Name         | Primary Vendor           | SIC Code | Turnover | Postcode | Primary Customer Contact | Primary Customer Email            |
| 453  | 1AHOWES Estate Agents | Voice Communications Ltd | 7031     | 1860346  | CM2 0YP  | Nikki Reed               | nikki.reed@lease-desk.co.uk       |
| 447  | 1AHOWES Estate Agents | Data Net Ltd             | 7031     | 1860346  | CM2 0YP  | Nikki Reed               | nikki.reed@lease-desk.co.uk       |
| 374  | 1AHOWES Estate Agents | Second Telco Channel Ltd | 7031     | 1860346  | CM2 0YP  | Nikki Reed               | nikki.reed@lease-desk.co.uk       |
| 298  | 1AHOWES Estate Agents | Smart Tel Ltd            | 7031     | 1860346  | CM2 0YP  | Nikki Reed               | nikki.reed@lease-desk.co.uk       |
| 472  | 1AHOWES Estate Agents | Bright Tel Ltd           | 7031     | 1860346  | CM2 0YP  | Nikki Reed               | nikki.reed@lease-desk.co.uk       |
| 375  | A A Manufacturing Ltd | Telco Channel Ltd        | 5190     | 99602    | LS1 0AA  | James Cook               | james.cook@lease-desk.co.uk       |
| 39   | A A Manufacturing Ltd | Data Communications Ltd  | 5190     | 99602    | LS1 0AA  | Catherine Parker         | catherine.parker@lease-desk.co.uk |
| 223  | A A Manufacturing Ltd | Third Telco Channel Ltd  | 5190     | 99602    | LS1 0AA  | James Cook               | james.cook@lease-desk.co.uk       |
| 10 of 38 items   Page 1 of 38   Displaying 1 to 10 of 378 items  |                       |                          |          |          |          |                          |                                   |
| Report: <span>Marketing Report (Email)</span>  |                       |                          |          |          |          |                          |                                   |
| <a href="#">View Report</a> <a href="#">Export to CSV</a>  |                       |                          |          |          |          |                          |                                   |
| Total  | Amount                |                          |          |          |          |                          |                                   |
| RBO  | 22,704,334.27         |                          |          |          |          |                          |                                   |
| Prospects  | 10,623,982.67         |                          |          |          |          |                          |                                   |

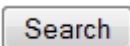
or  to view in CSV format as per below;



| 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  | 020909B0   | 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 Moli   | 0         |                   |
| 5  | 010909XY   | XYZ Cakes Prospect  | Carl Stapl  | 0         |                   |
| 6  | 1.19E+08   | Alpha Mei Live      | Mark Gilsc  | 11419.92  | 24/05/2010        |
| 7  | 030909SS   | SS Retail U Dead    | Clive Fairc | 14543.05  | 01/03/2008        |
| 8  | 0000/123   | AT Manuf: Secondary | Reece Asf   | 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 on how to select report type and view data.

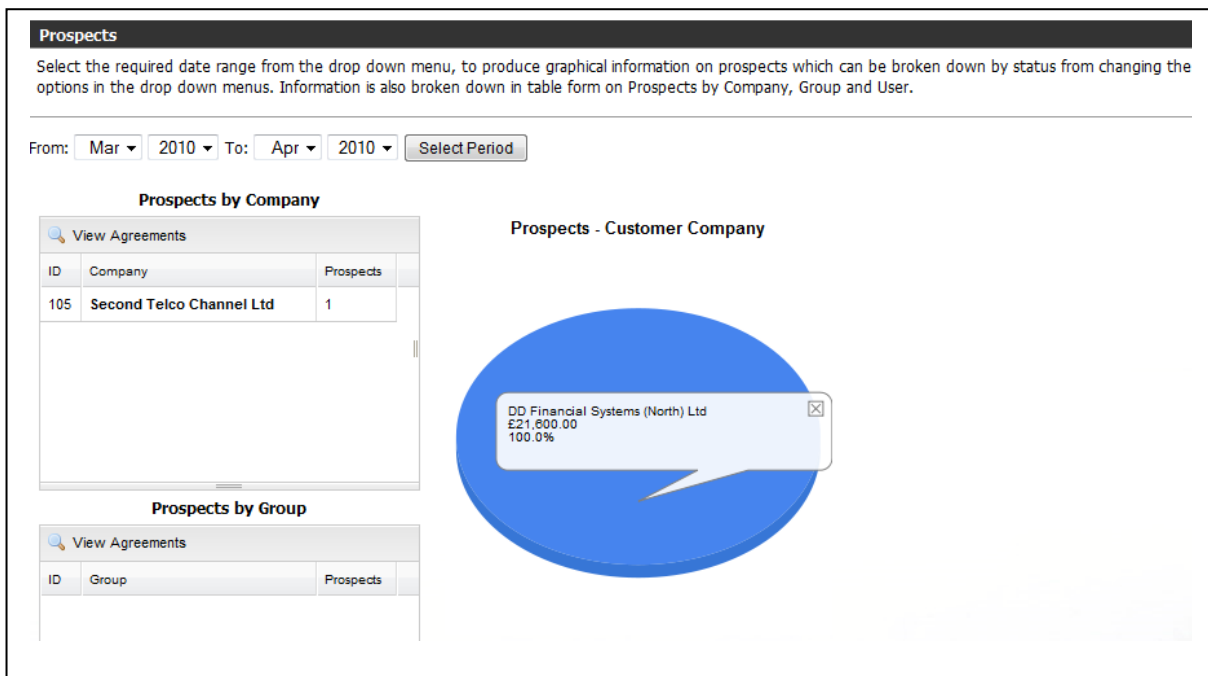
## 6. Dashboard:

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

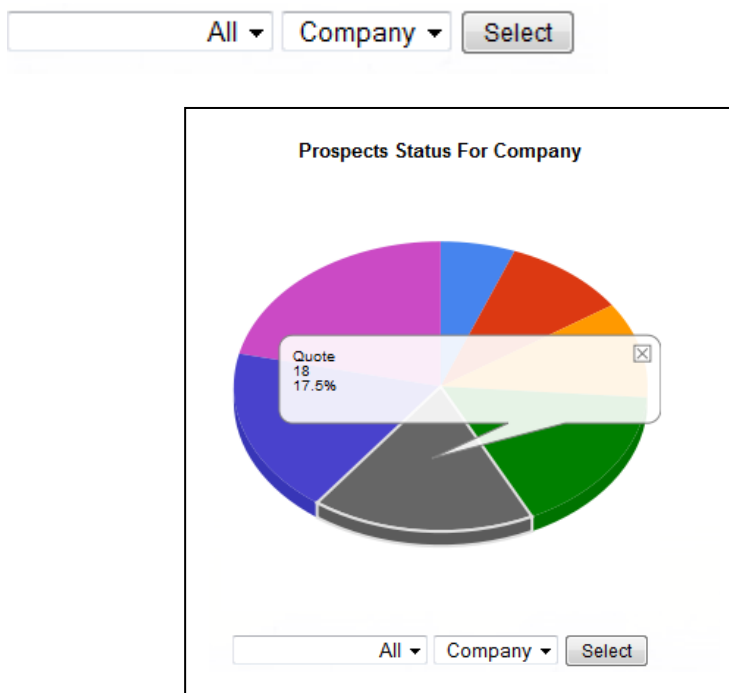
### 6.1. Prospects:

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

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



3. From the date range at the top of the page, select the required date and click [Select Period](#)
4. The data and graph presented on the page will then change as a result of the date ranges selected.
5. Click on 'Select', as indicated below, and the graph will then display all of the Prospect Milestones.



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

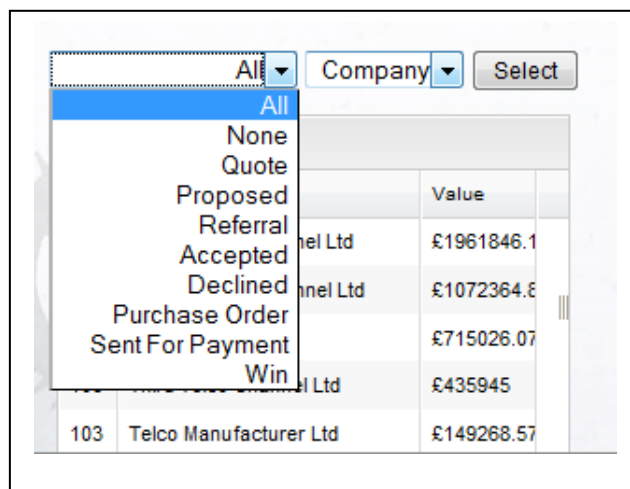
View Agreements

| ID  | Company                  | Prospects |
|-----|--------------------------|-----------|
| 176 | Fourth Telco Channel Ltd | 15        |
| 182 | Bright Tel Ltd           | 11        |
| 102 | Telco Channel Ltd        | 9         |
| 180 | Voice Tel Comms Ltd      | 9         |
| 181 | Pulse Networks Ltd       | 9         |
| 183 | Smart Tel Ltd            | 9         |

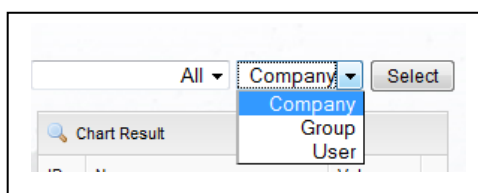
6. Alternatively, double click on the required line.

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

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



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

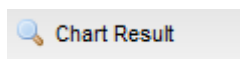


3. You will then be presented with the required information within the table below.

| Chart Result |                          |            |
|--------------|--------------------------|------------|
| ID           | Name                     | Value      |
| 105          | Second Telco Channel Ltd | £492244.01 |

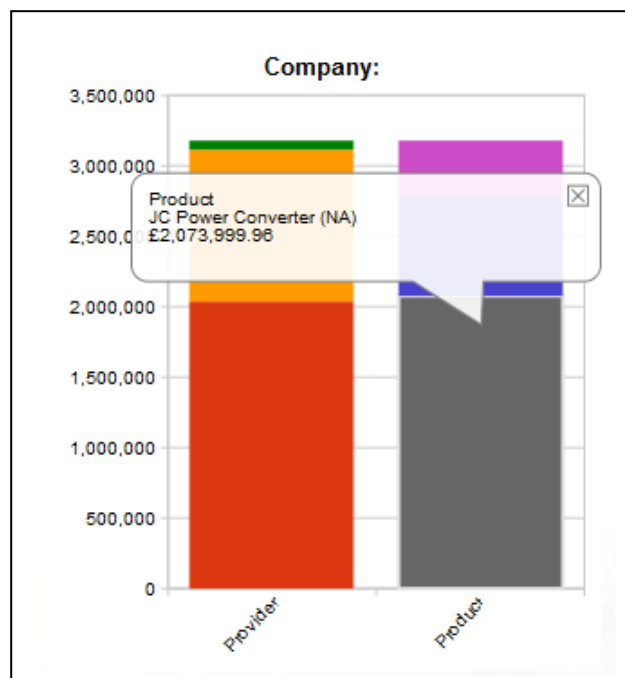
4. Highlight the individual line of information required; Company, User or Group.

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

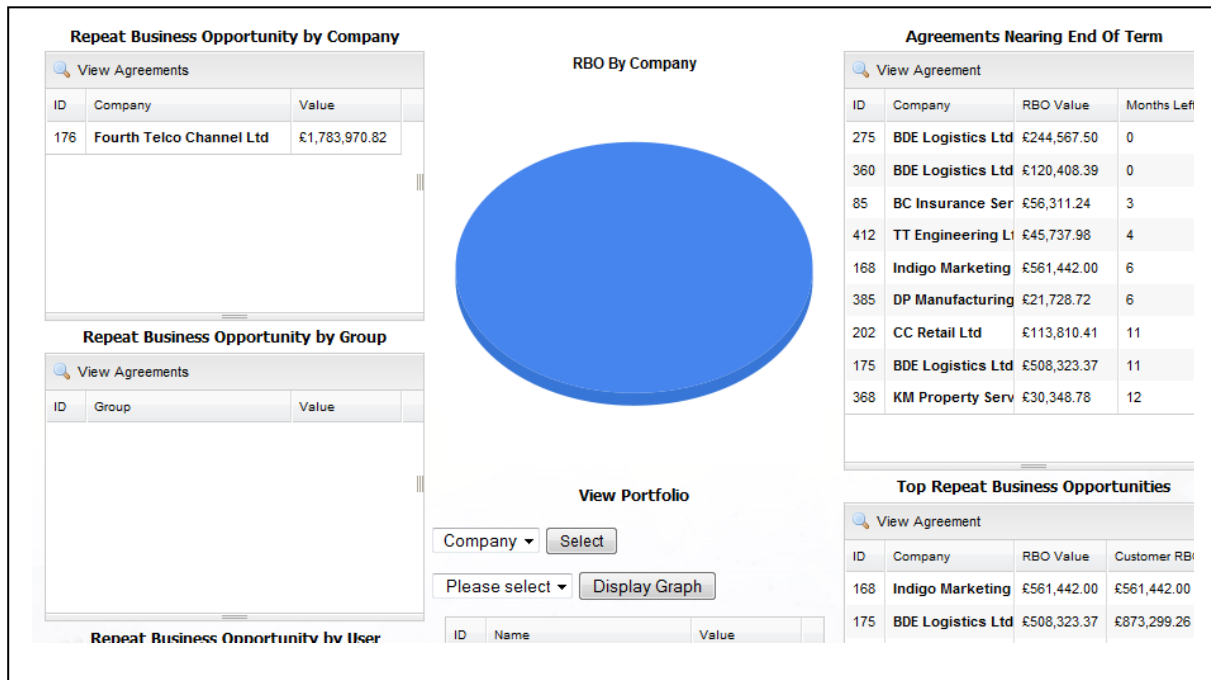
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

## 6.2. Customers:

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

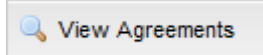
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

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



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

above, highlight the relevant line within the table and click



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

| Repeat Business Opportunity by Company |                             |                           |        |                   |           |            |
|--|-----------------------------|---------------------------|--------|-------------------|-----------|------------|
| Below are the results from your search |                             |                           |        |                   |           |            |
| View Agreement View Log                |                             |                           |        |                   |           |            |
| Id                                     | Identifier                  | Company                   | Status | Primary User      | RBO Level | End Date   |
| 85                                     |                             | BC Insurance Services Ltd | Live   | Keith Hutchinson  | 56311.24  | 05/07/2010 |
| 275                                    | CMW Test 05                 | BDE Logistics Ltd         | Live   | Pete Johnson      | 244567.50 | 08/03/2010 |
| 360                                    | CWM 9 March Test 3          | BDE Logistics Ltd         | Live   | Pete Johnson      | 120408.39 | 09/03/2010 |
| 175                                    | 000/029                     | BDE Logistics Ltd         | Live   | Pete Johnson      | 508323.37 | 30/01/2011 |
| 202                                    | Chloe Alerts Testing 9 Feb  | CC Retail Ltd             | Live   | Michael Johns     | 113810.41 | 10/02/2011 |
| 274                                    | CMW Test 04                 | CC Retail Ltd             | Live   | Michael Johns     | 20079.53  | 08/08/2012 |
| 413                                    | RBO TEST                    | CC Retail Ltd             | Live   | Michael Johns     | 8722.88   | 10/12/2011 |
| 237                                    | Chloe Alerts Testing 23 Feb | CMV Taxi's                | Live   | Fran Merryweather | 22426.00  | 24/08/2011 |

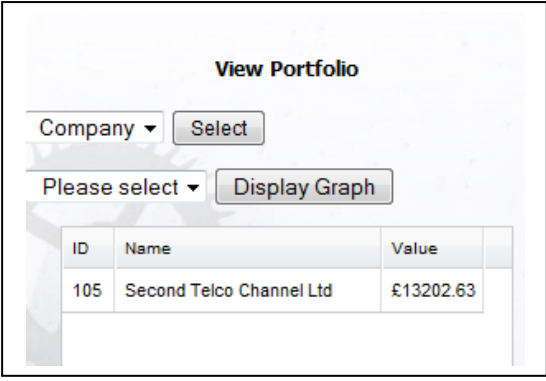
10 Page 1 of 2 Displaying 1 to 10 of 14 items

| Total     | Amount       |
|-----------|--------------|
| RBO       | 1,783,970.82 |
| Prospects | 0.00         |

5. You then have the option to Add a completely new Agreement, Edit Agreement, or View Agreement, and View Log. Refer back to Chapter 4 for details on how to do this.

### 6.2.1 Viewing/Amending Portfolio Information:

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



The screenshot shows the 'View Portfolio' interface. It has a 'Company' dropdown menu with a 'Select' button next to it. Below that is a 'Please select' dropdown menu with a 'Display Graph' button next to it. At the bottom, there is a table with the following data:

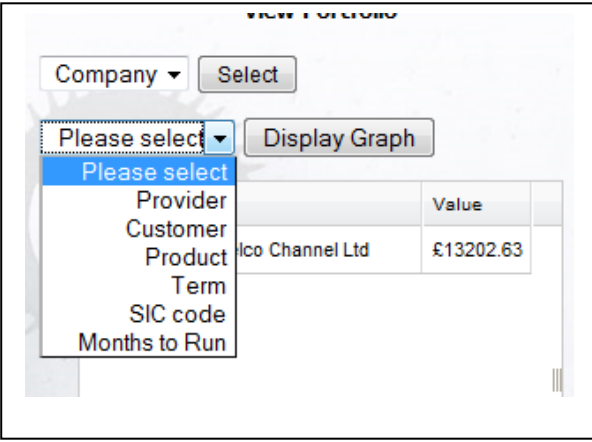
| ID  | Name                     | Value     |
|-----|--------------------------|-----------|
| 105 | Second Telco Channel Ltd | £13202.63 |

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

3. Click 

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

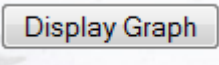
5. Next select the Agreement grouping from the drop down menu, as indicated below;



The screenshot shows the 'View Portfolio' interface with the 'Please select' dropdown menu open. The menu options are: Please select, Provider, Customer, Product, Term, SIC code, and Months to Run. The table below the dropdown shows the same data as the previous screenshot:

| ID  | Name                     | Value     |
|-----|--------------------------|-----------|
| 105 | Second Telco Channel Ltd | £13202.63 |

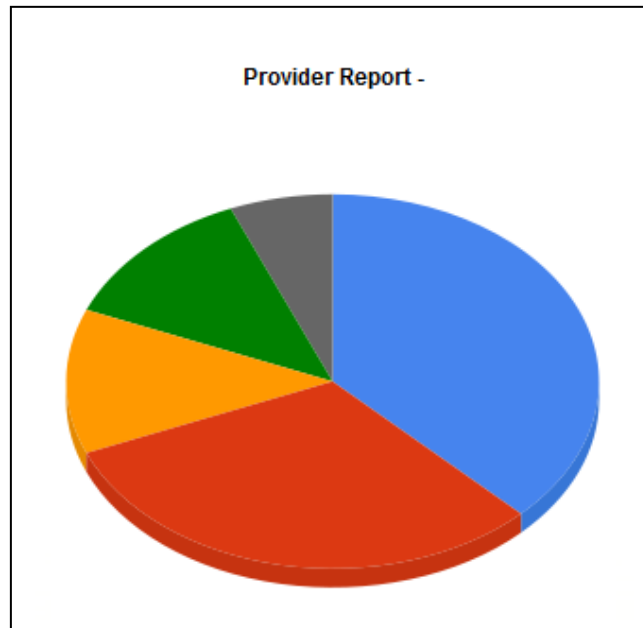


A rectangular button with a light blue border and a light blue background, containing the text "Display Graph" in a dark blue font.

6. Highlight the required row from the table and click

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

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



## 7. Alerts:

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

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

The Alert Triggers are as follows;

- When a new Agreement is added to the system as a live, or Prospect contract.
- When a Prospect changes to a live customer (The vendor will be emailed to send insurance details).

- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through the term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.
- When an Agreement reaches one month before the end of term, in order to notify customer of notice in writing to the Financial Provider.
- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

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

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

LEASE-DESK.COM

Logged in as: Eddie Large

Home Agreements Search Dashboard Feedback Alerts (5) Logout

back

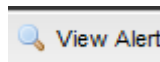
**My Alerts**

A full list of pending alerts requiring user action.

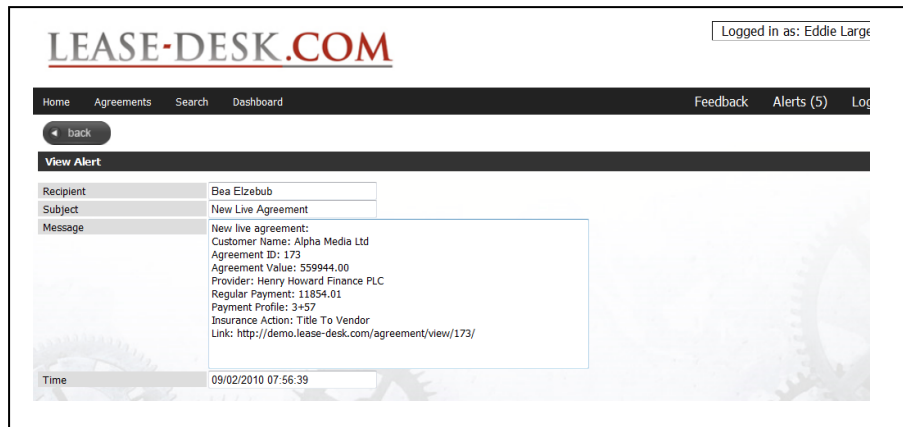
View Alert Completed Alert

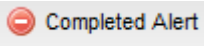
| ID | Recipient    | Subject            | Message  | Time                |
|----|--------------|--------------------|--|---------------------|
| 87 | Bea Elzebub  | New Live Agreement | New live agreement:<br>Customer Name: Alpha Media Ltd<br>Agreement ID: 173<br>Agreement Value: 559944.00<br>Provider: Henry Howard Finance PLC<br>Regular Payment: 11854.01<br>Payment Profile: 3+57<br>Insurance Action: Title To Vendor<br>Link: <a href="http://demo.lease-desk.com/agreementview/173/">http://demo.lease-desk.com/agreementview/173/</a> | 09/02/2010 07:56:39 |
| 75 | James Purple | New Live Agreement | New live agreement:<br>Customer Name: H Fashion Retail Ltd<br>Agreement ID: 70   | 08/02/2010 11:27:04 |

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



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



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

## 8. General Functionality:

### 8.1. Sort:


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

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



### 8.2 Quick Search:

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

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


|    |            |                           |
|----|------------|---------------------------|
| 85 |            | BC Insurance Services Ltd |
| 87 | FOUR1006   | BC Insurance Services Ltd |
| 59 | 1401101037 | BDE Logistics Ltd         |
| 2  | 020909BDE  | BDE Logistics Ltd         |
| 16 | 101234567  | Beta Healthcare Ltd       |

Quick Search  Company

 10   Page 1 of 5  Displaying

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

Quick Search

 10   Page 1 of 2  Displaying 1 to 10 of 268 items

**Groups List**

Full Name  
Full Name  
User Name  
Company

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

4. Click  to search for the information





5. Click  to start from the beginning.

### 8.3 Refresh:

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

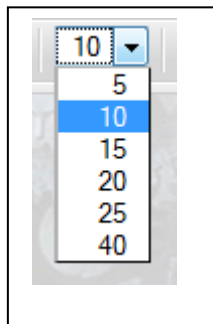
### 8.4 Scrolling through records:

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

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

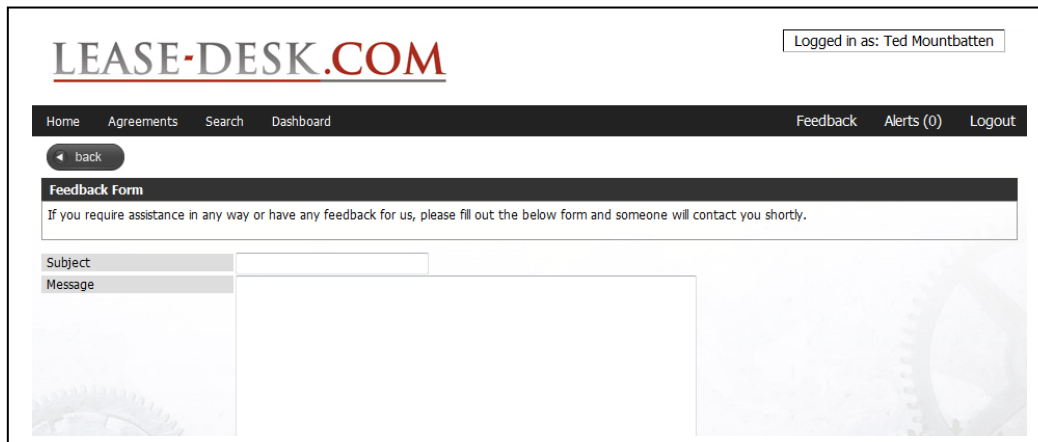
### 8.5 Changing the amount of records per view:

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



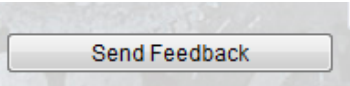
## 9. Feedback:

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



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

7. Once completed, click



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

**Feedback Form: Complete**

Thank you for completing the feedback form

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

**10. Contact Details:**

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

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

**Switchboard:** 01302 245310  
**Email:** [info@Lease-Desk.com](mailto:info@Lease-Desk.com)  
**[www.Lease-Desk.com](http://www.Lease-Desk.com)**