LEASE-DESK

Super User Manual

Version 1.0

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1. An Introduction to Lease-Desk:

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

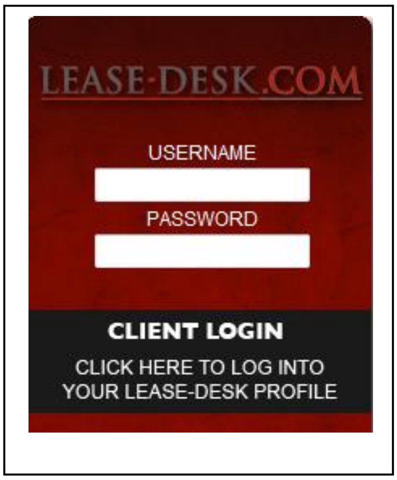
Proctor Consulting's Lease-Desk administration team are responsible for maintaining the software and liaising with the Financial Providers on the Vendors behalf, to ensure all leasing agreement and product information is kept up to date.

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

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

2. Logging into Lease-Desk:

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



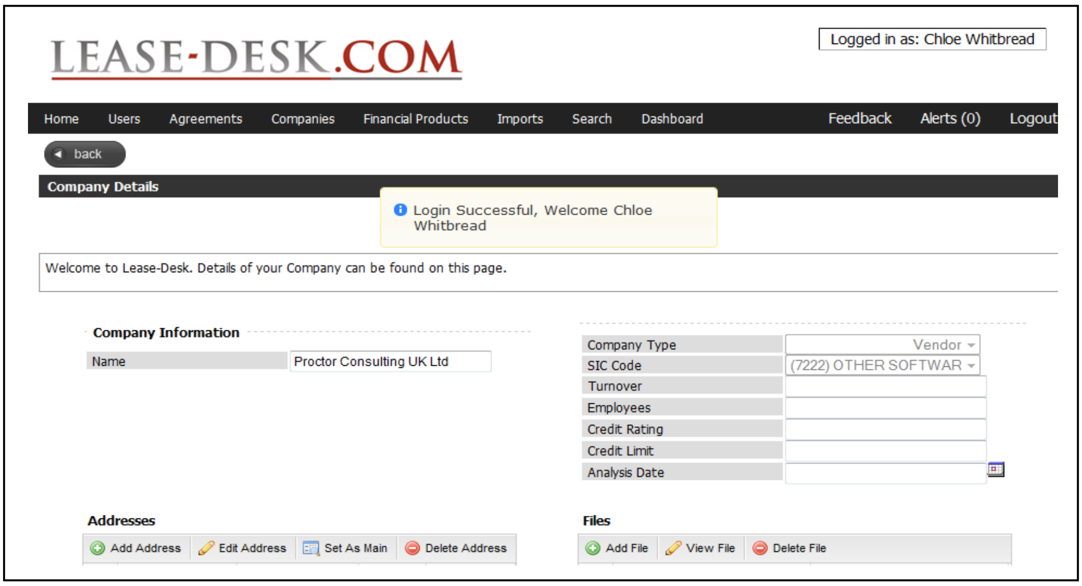
2. You will then be presented with the User Login page, as per below.

3. Enter your details and click on Login

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

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

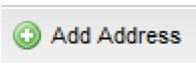
1. Once you have logged in you will be presented with the home screen, as per below.



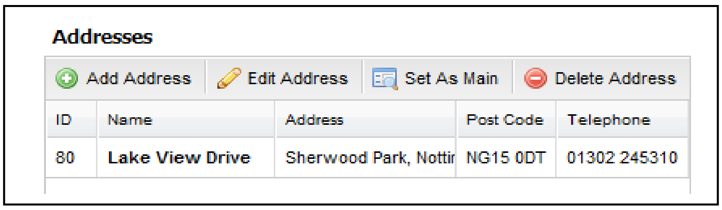
2. This screen details information relating to your company such as Addresses, Files, Users, Products (if you are a Vendor), and Financial Products (if you are a Financial Provider).

3.1. Adding, Editing, Setting as Main, and Deleting Addresses:

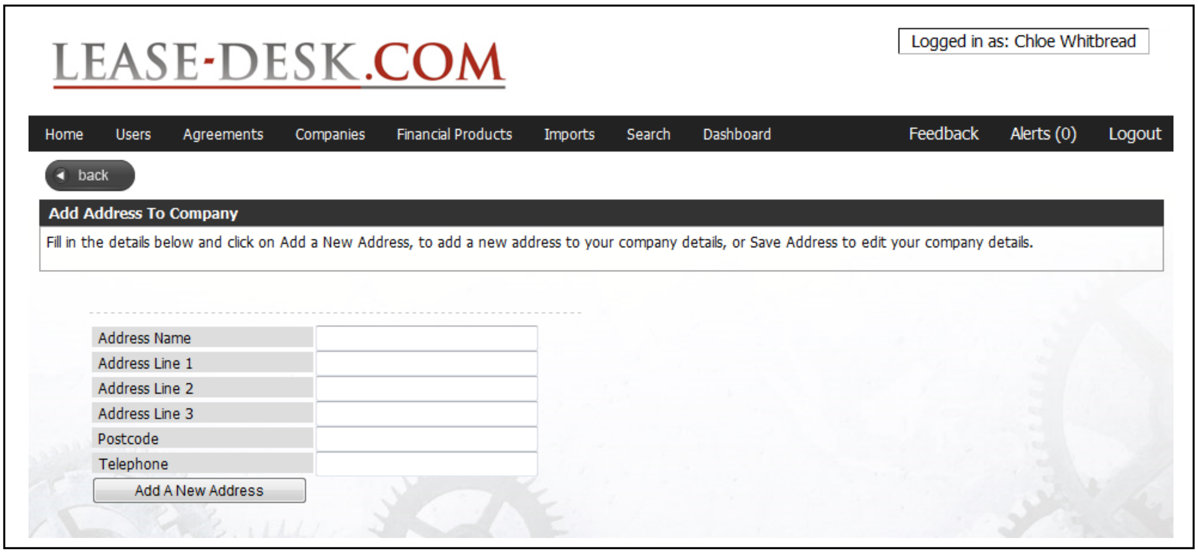
3.1.1. Adding an Address:

1. Click on 

from the main Addresses table as indicated below.



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

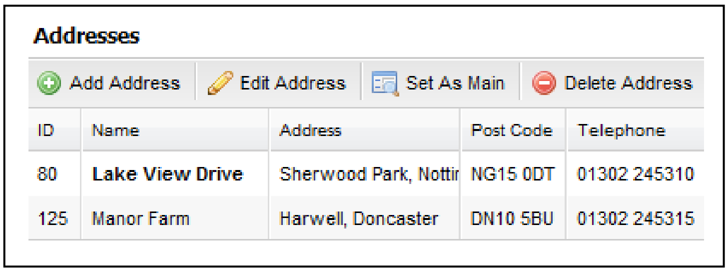


3. Fill in the full address details and click on 

Note: (Needs changing to Save Address so new image will be needed on both the above)

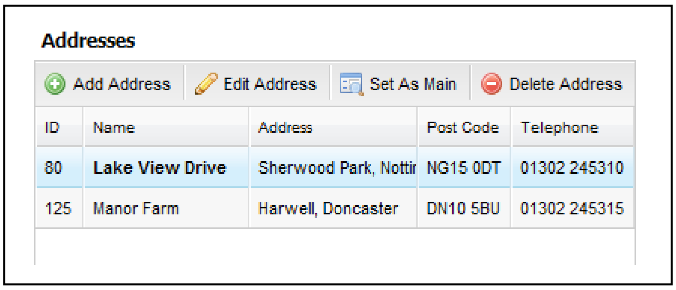
4. You will then be taken back to your Company Details screen in Edit mode and be presented with the following confirmation message;

5. The address will also appear within the 'Addresses Table' as per below;

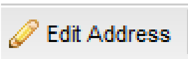


3.1.2. Editing an Address:

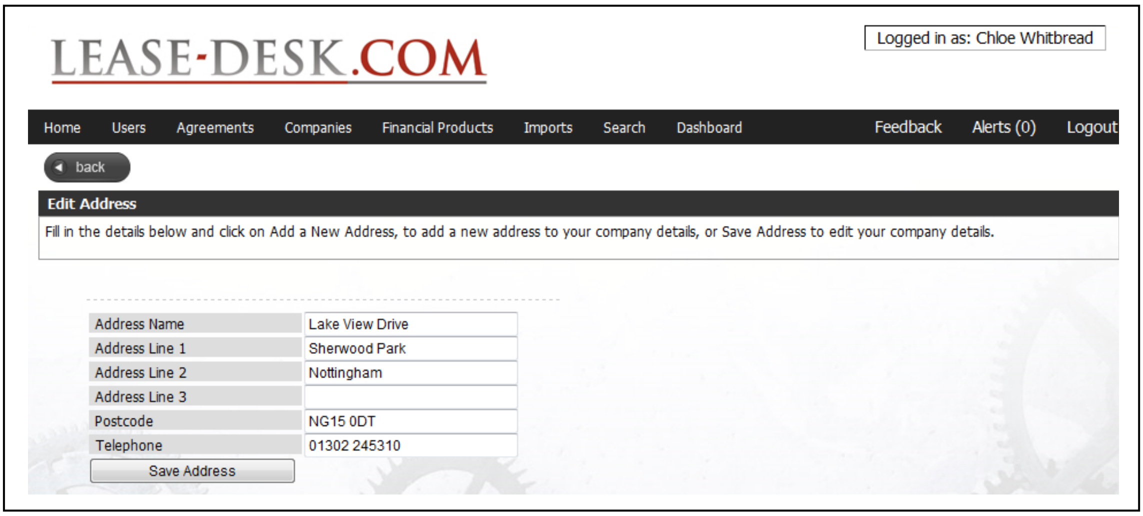
1. From the main Addresses table, highlight the required address as indicated below;

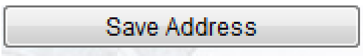


ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

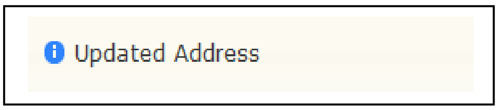
2. Click on 

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



4. Amend the required Address details and click on 

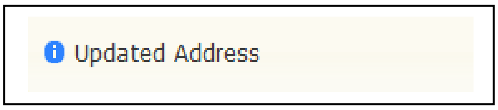
5. You will then be presented with the following confirmation message and taken back to your main Company Details screen, in Edit mode.



3.1.3. Setting an Address as Main:

1. To set an address against your Company Details as the main site address, highlight the required address (as indicated previously) and click Set As Main

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



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

Addresses

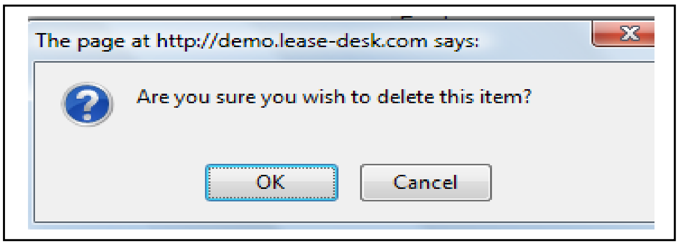
Add Address | Edit Address | Set As Main | Delete Address

ID	Name	Address	Post Code	Telephone
80	**Lake View Drive**	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

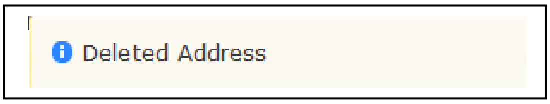
3.1.4. Deleting an Address:

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

2. You will then receive the following message;



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

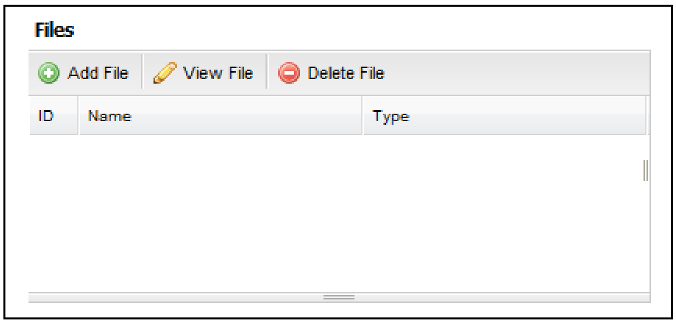


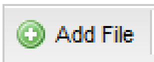
3.2. Adding, Editing, Viewing, and Deleting Files:

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

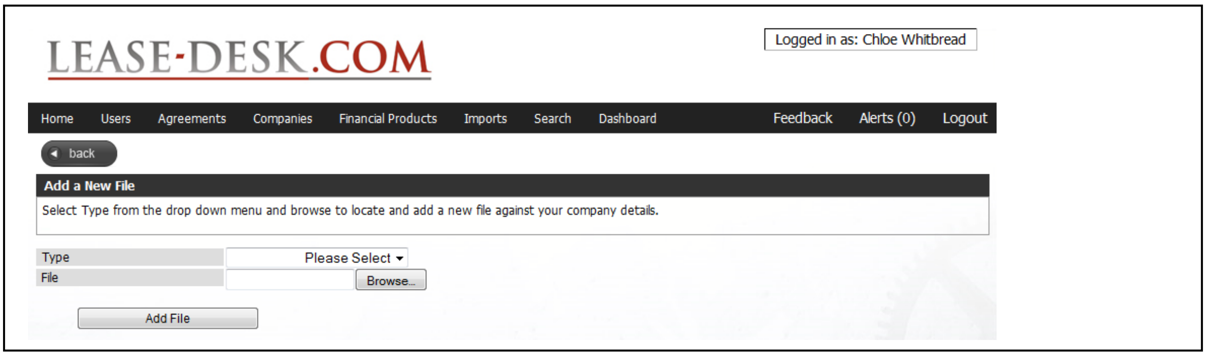
3.2.1. Adding a File:

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



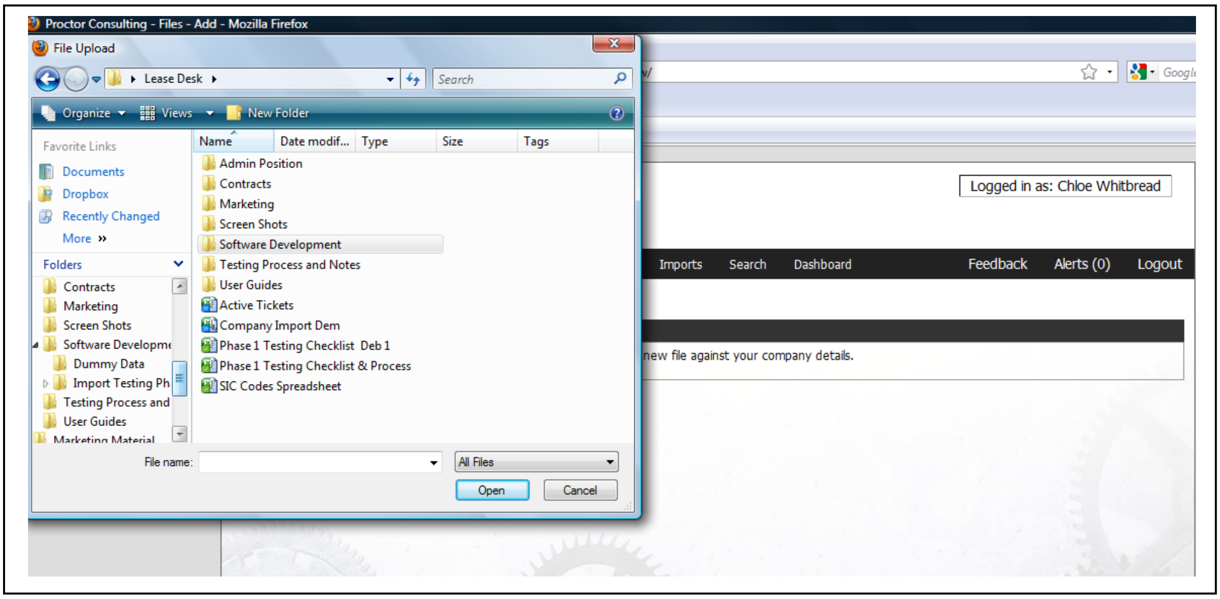
2. To add a file against your Company Details, click 

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



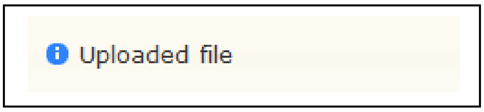
4. Select a 'Type' from the drop down menu, for example Credit Report, Management Accounts etc.

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



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

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



3.2.2. Viewing a File:

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

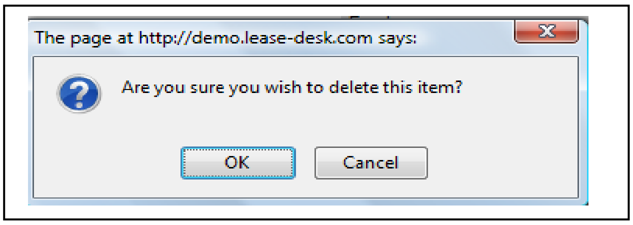
2. Click 

3.2.3. Deleting a File:

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

2. Click 

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



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

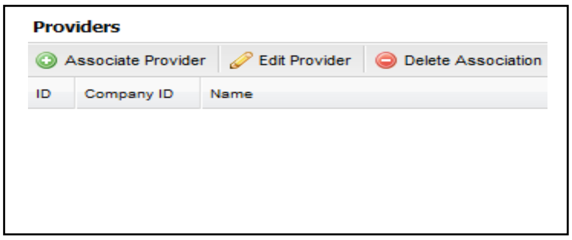
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;

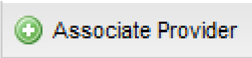
3.3. Providers: Associating, Editing, and Deleting Association:

3.3.1. Associating a Provider (Vendor Only):

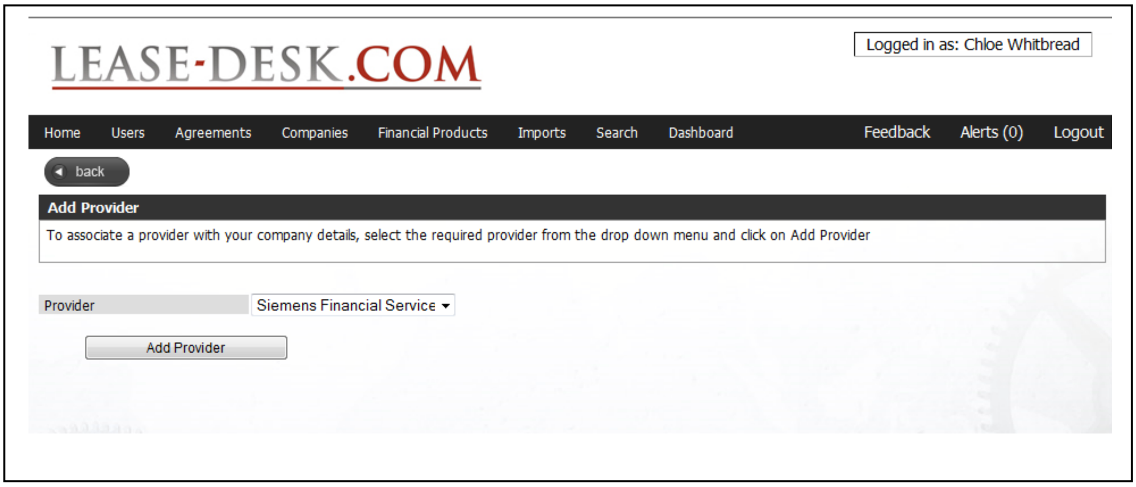
1. To associate a Provider with your Company, go to the Providers table, within the Edit

Company Details screen;



2. Click 

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



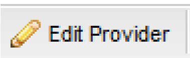
4. Select a Provider from the drop down menu and click 

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

3.3.2. Editing a Provider (Vendor Only):

1. To edit an associated Providers details, go to the Providers table, within the Edit

Company Details screen as previously shown.

2. Click 

3. You will then be presented with the 'Edit Company Details' screen for the selected Provider.

4. Edit the details required from each table, i.e. Addresses, Company Details, Users, Financial Products (see 5.5.1), Files (following same process as indicated previously)

3.3.2. Deleting a Provider Association (Vendor Only):

1. To delete an associated Providers details, go to the Providers table, within the Edit

Company Details screen as previously shown and highlight the required Provider.

2. Click Delete Association

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

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

3.4. Adding, Editing and Deleting Users:

3.4.1. Adding a User:

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

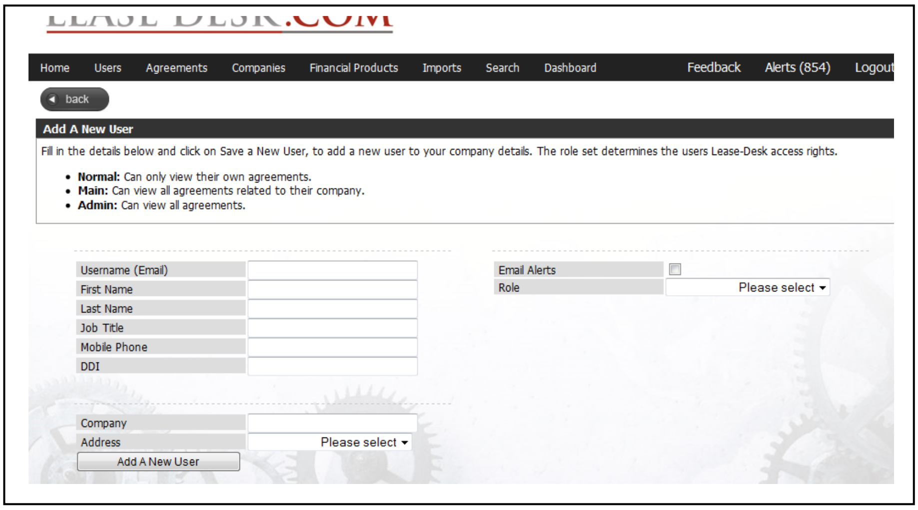
Users

Add User | Edit User | Delete User

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

2. Click Add User

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



4. Fill in the full User Details, First Name, Last Name, etc.

Note: The Company should auto populate to your Company as you are adding a user to your Companies details.

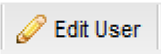
- The Alerts tick box is for users that will be adding/viewing Agreement information and will need email alerts sent to them, for example Account Managers at a Vendor or Sales Managers.
- In addition, the Role type selected will determine what rights the user has, for example Super User Admin will have access to all areas with editing functionality, whilst Normal will only have access to their agreement and company information and limited editing rights.

5. Click 

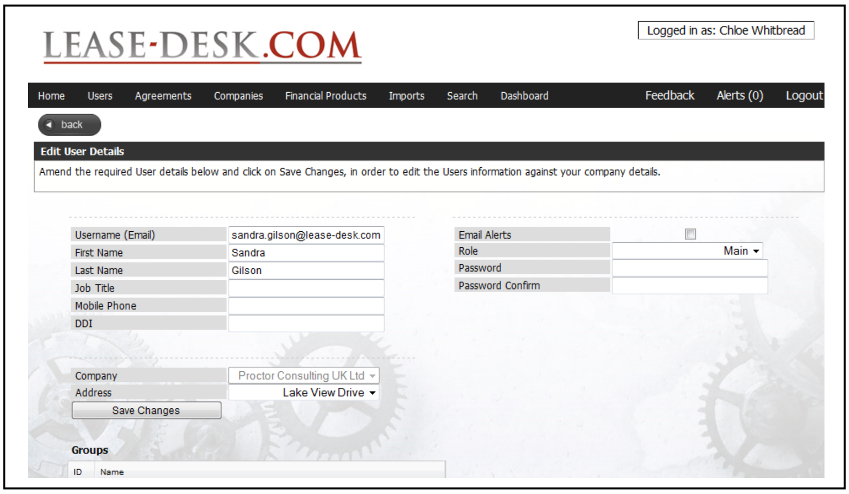
6. You will then receive the following confirmation message and be taken back to the main Company Details screen;

3.4.2. Editing a User:

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

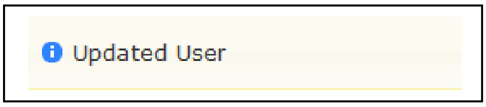
2. Click 

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



4. Amend the required details and click 

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



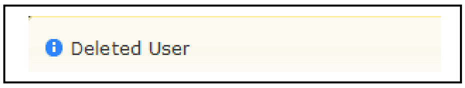
3.4.3 Deleting a User:

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

2. Click 

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

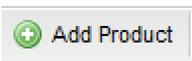
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;



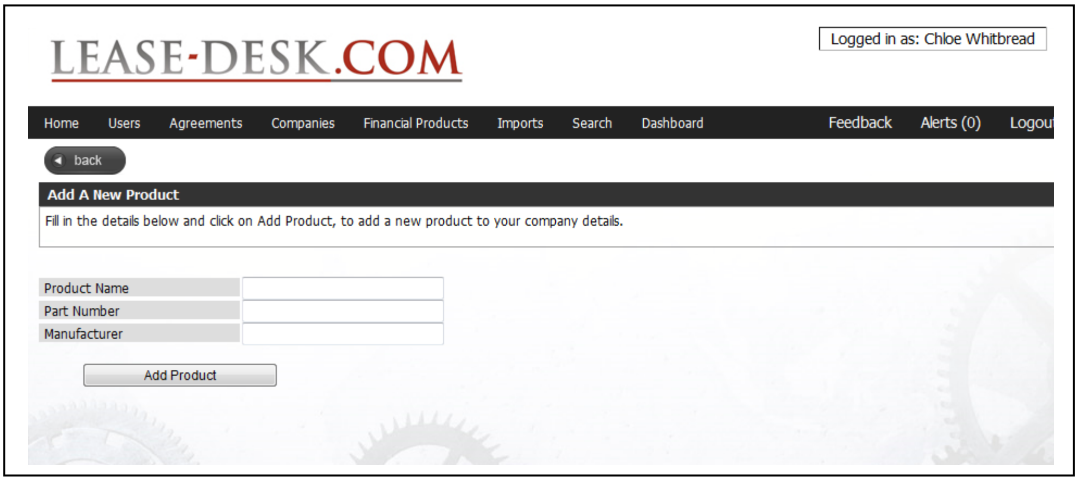
3.5. Adding, Editing and Deleting Products (Vendor Only):

3.5.1 Adding a Product:

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

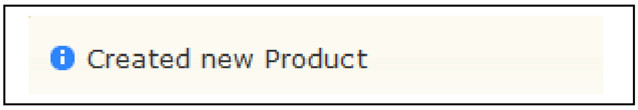
2. Click 

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



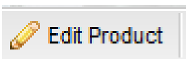
4. Fill in the details and click 

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



3.5.2 Editing a Product:

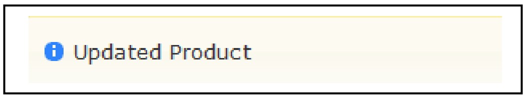
1. To edit an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

2. Click 

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

4. Amend the required detail and then click 

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



3.5.3 Deleting a Product:

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

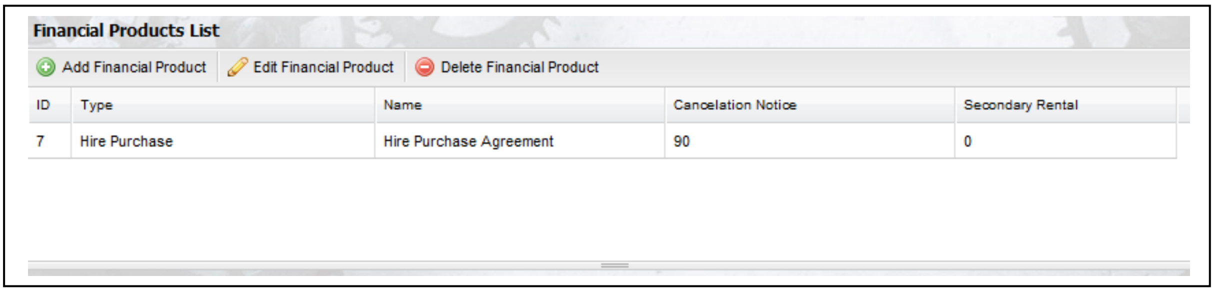
3. You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.

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

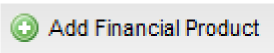
3.6. Adding, Editing and Deleting Financial Products (Financial Provider Only):

3.6.1 Adding a Financial Product:

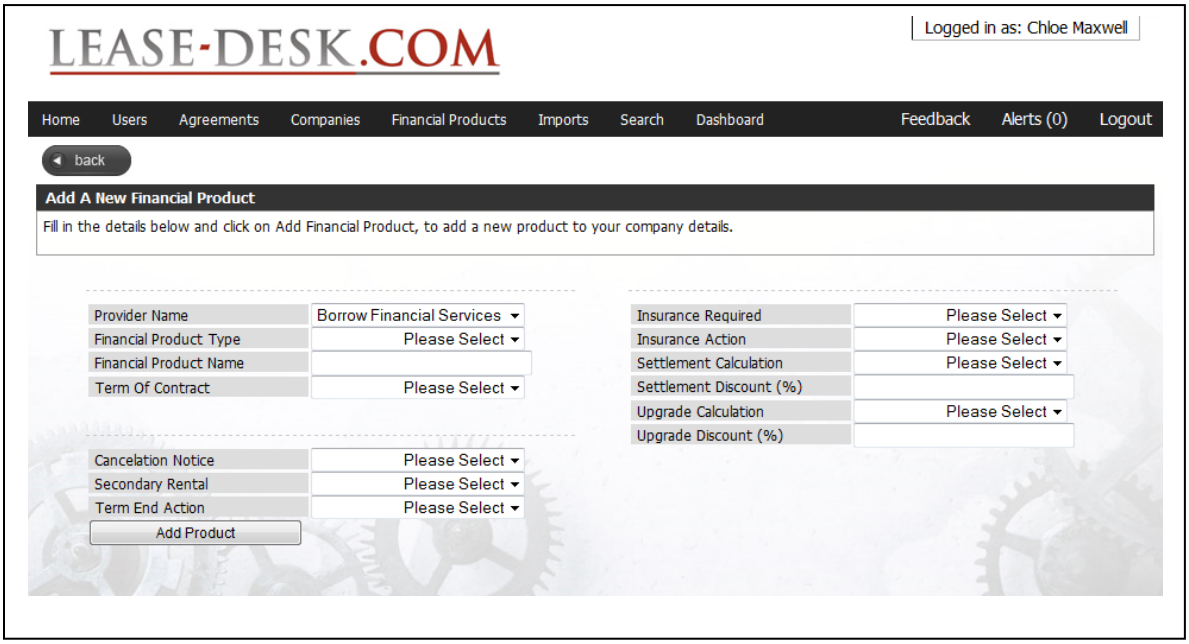
1. To add a Financial Product to your Company Details, go to the main Financial Products table within the homepage as indicated below;



ID	Type	Name	Cancelation Notice	Secondary Rental
7	Hire Purchase	Hire Purchase Agreement	90	0

2. Click 

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



4. Fill in the following Financial Product Details;

- **Provider Name:** (From the drop down menu)
- **Financial Product Type:** (From the drop down menu)
- **Financial Product Name:** Enter the name of the Financial Product here
- **Term of Contract:** This should be specified by the Provider and will be fixed or minimum
- **Cancelation Notice:** (Whether there is any notice for the customer when cancelling)
- **Secondary Rentals:** (When the product offered within the lease agreement goes into secondary rentals following the end of the contract.
- **Term End of Action:** (What happens at the end of the contract, i.e. the equipment goes to the customer)
- **Insurance Required:** (Whether there is an insurance clause within the Financial Product type which advises insurance evidence must be provided by the Vendor/Customer.
- **Insurance Action:** Confirm in Writing, Provide Policy, Forward Insurance Certificate or none
- **Settlement Calculation:** i.e. 3% (normally specified in Financial Providers T's & C's)
- **Settlement Discount:** (This will be either Rule of 78 or Rental Stream)
- **Upgrade Calculation:** (This will be either Rule of 78 or Rental Stream)
- **Upgrade Discount:** i.e. 3% (normally specified in Financial Providers T's & C's)

5. Click 

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

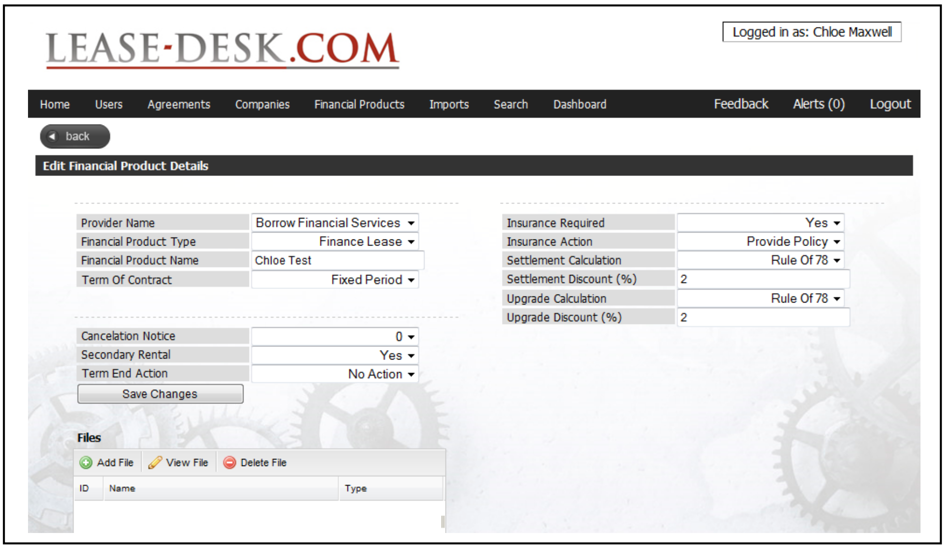
Created new Financial Product

3.6.2 Editing a Financial Product (Financial Provider Only):

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

2. Click Edit Financial Product

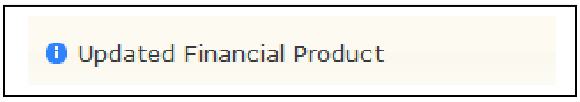
3. You will then be presented with the 'Edit Financial Product Details' screen as per below;



4. Amend the required details and click Save Changes

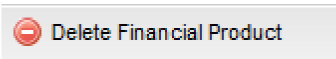
Note: You will see you can Add, View or Delete Files from this page as well. Follow the previous process in 5.2 on how to do this.

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



3.6.3 Deleting a Financial Product (Financial Provider Only):

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

2. Click 

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

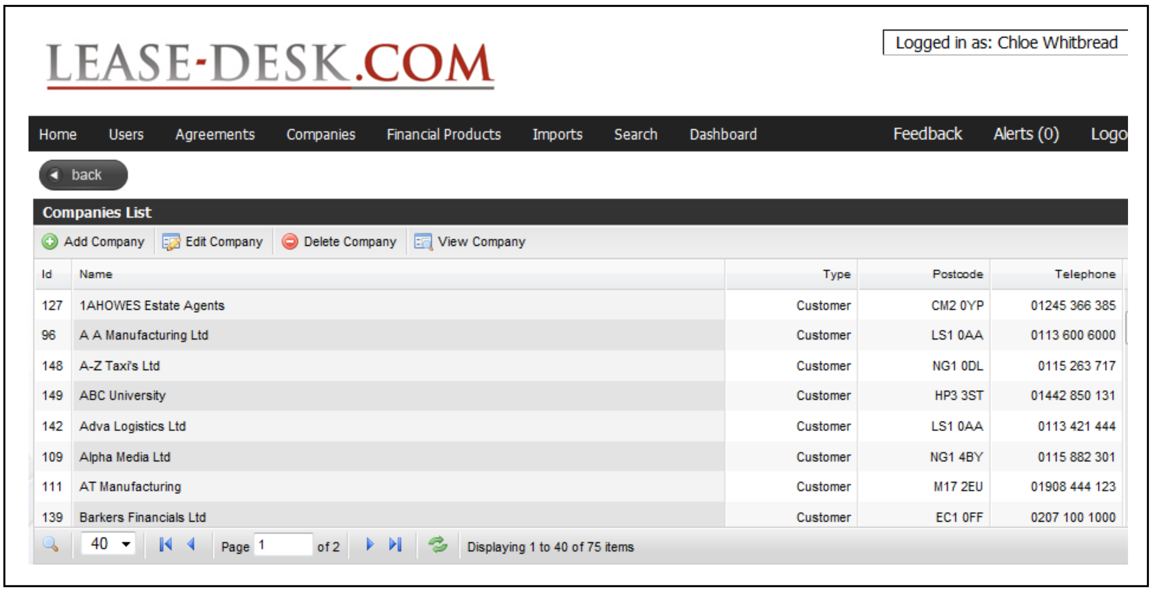
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;

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

4.1. Adding a Company:

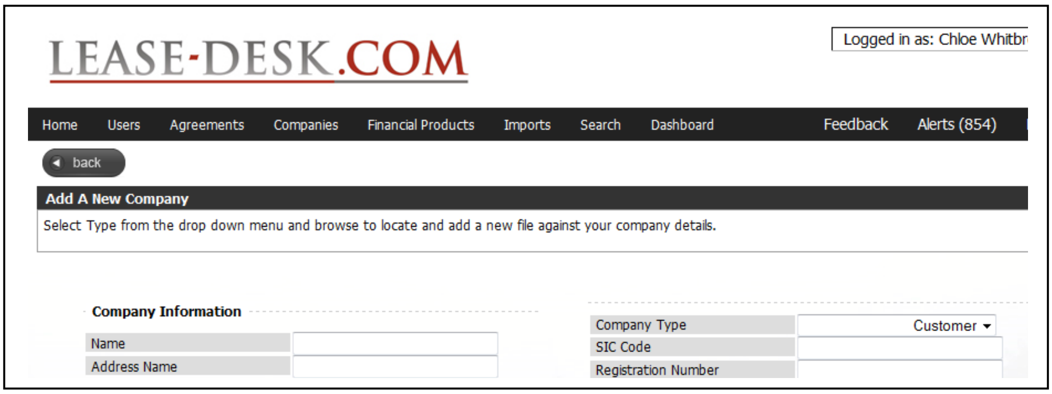
1. From the main menu select **Companies**

2. This will take you to the Companies List screen as indicated below;



1. Click on **Add Company**

2. You will then be presented with the 'Add a new Company Screen' as indicated on the next page.



3. Complete the following fields;

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

4. And if known the following additional details;

- SIC Code
- Turnover
- Company Registeration
- Employees
- Credit Rating
- Credit Limit
- Analysis Date (This is the date entered when the Credit Limit and Rating have been checked)

5. Once completed, click on 

to save the details.

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

4.2. Editing a Company:

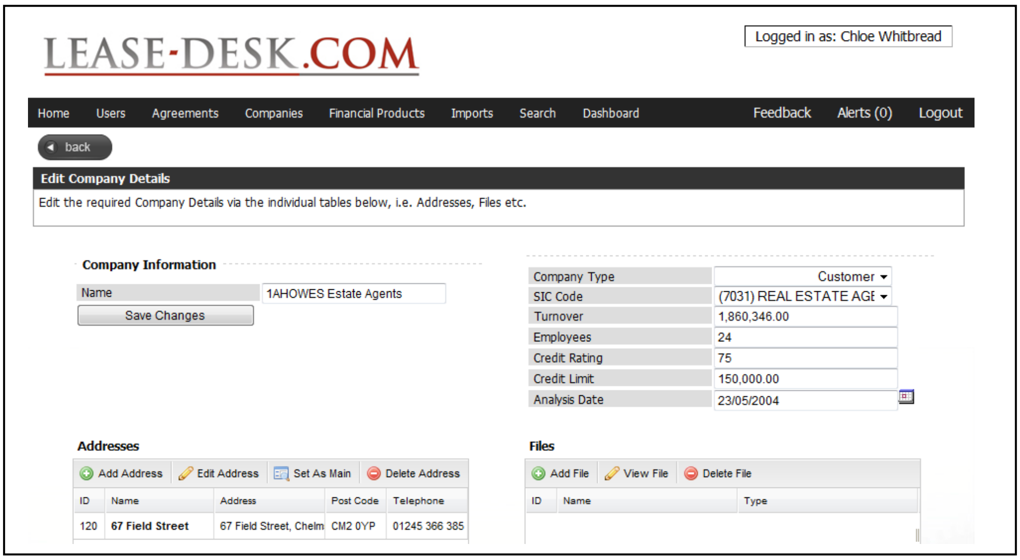
1. Follow previous steps 1 and 2.

2. Highlight or double click on the required Company from the main Companies List.

(For help on how to use the quick search option, go to step....)

3. Click on 

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



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

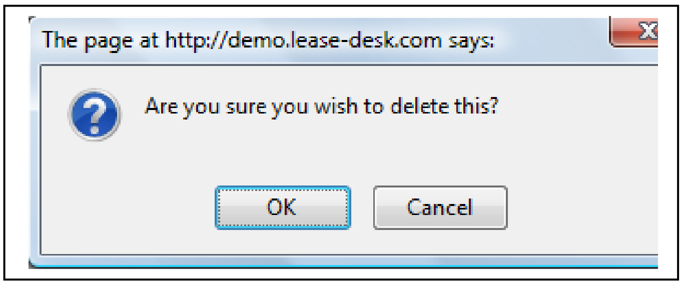
- **Addresses** (Add, Edit, Delete)
- **Files** (Add, View and Delete)
- **Users** (Add, View and Delete)
- **Providers** (if Company is a Vendor)
- **Financial Products** (if Company is a Financial Provider)**,**
- **Products** (if Company is a Vendor)

6. for how to Add, Edit, View or Delete any table, follow the relevant process in chapter 5.

4.3. Deleting a Company:

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

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



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

Note: Companies removal will delete all everything related to them (Products / Users / Company association) when they aren't used in an agreement.

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

Note: *If there are associated records against a company, for example, Addresses, Files, Products, Financial Products or Users, you will need to individually delete these prior to deleting a Company.*

4.4. Viewing a Company:

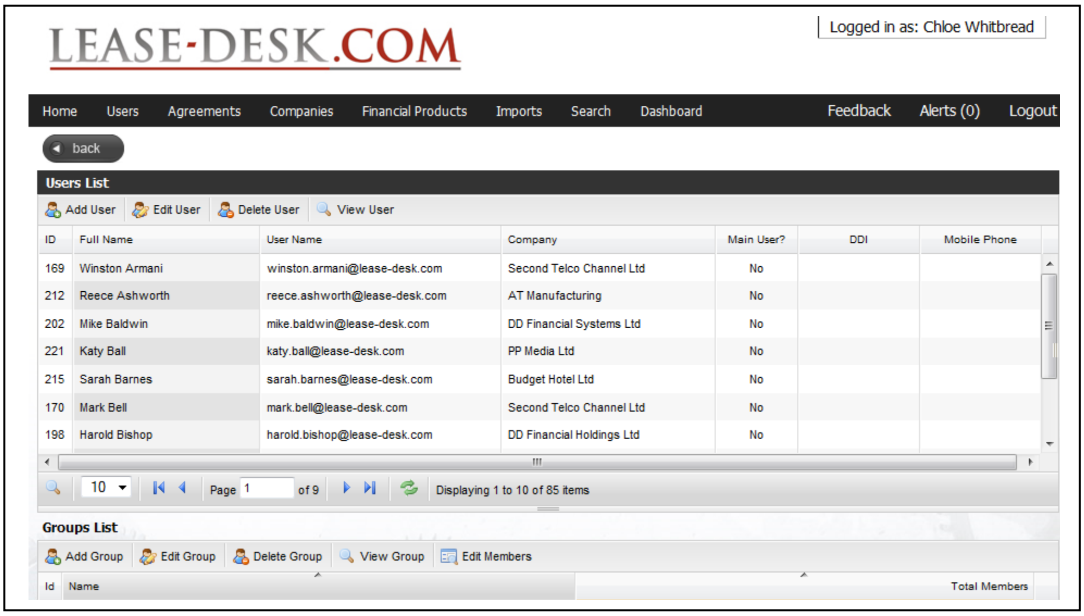
1. Highlight a Company from the table and then click on 

2. You will then be presented with the Company Details screen.

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

5.1. Adding a User:

1. From the main menu go to Users
2. This will take you to the main Users screen as indicated below;



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

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

5.2. Editing a User:

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

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

5.3. Deleting a User:

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

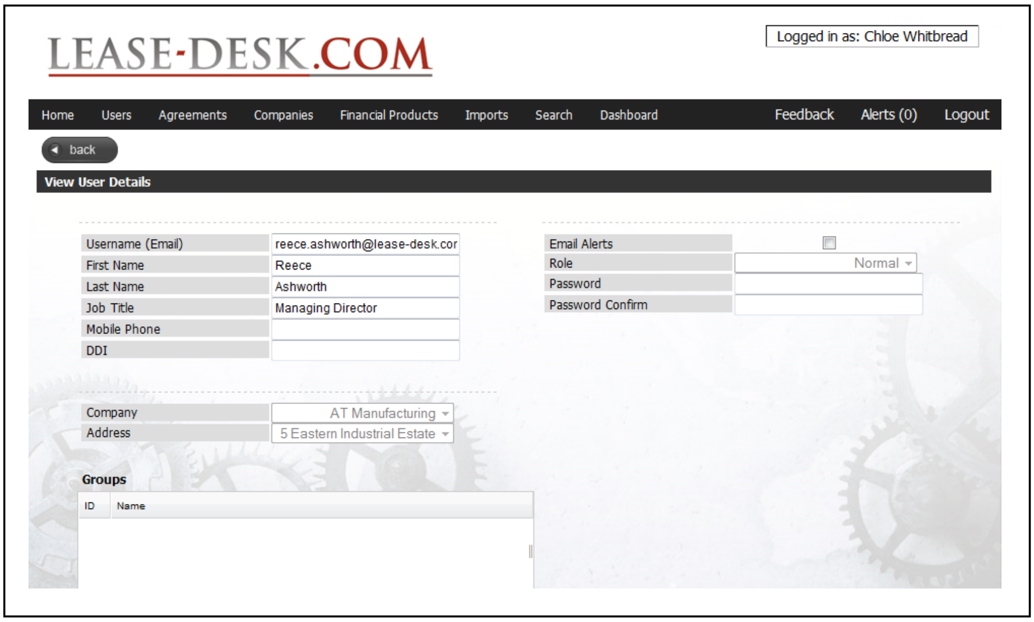
2. Follow points within the previous chapter, ‘**3.4.3. Deleting a User’**

Note: User removal will delete all everything related to them (alerts/ group association) when they aren’t used in an agreement.

5.4. Viewing a User:

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

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

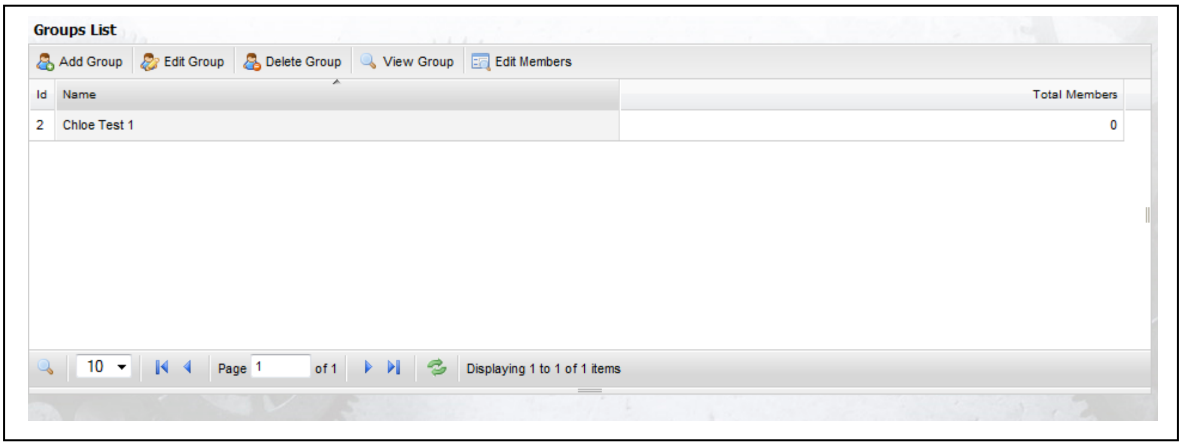


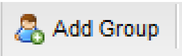
6. Group Screen: Adding, Editing, Viewing, Deleting & Editing Members

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

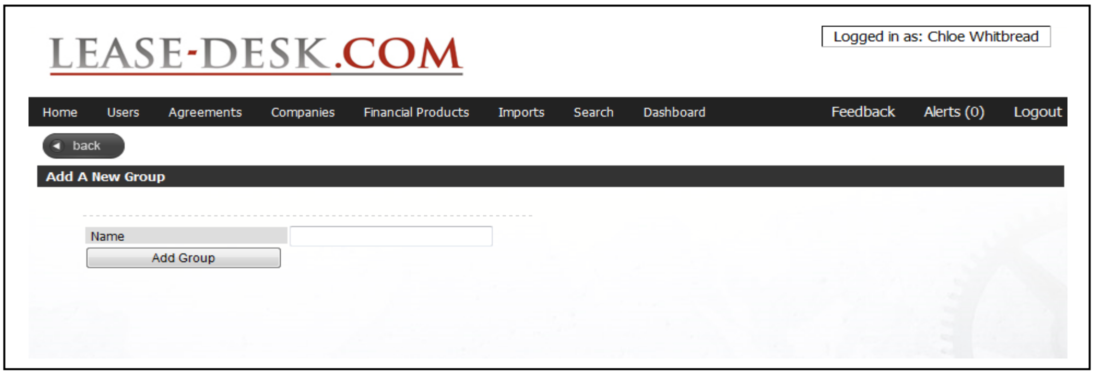
6.1. Adding a Group:

1. From the Main Users screen as previously shown, go to the Groups List at the bottom half of the screen as indicated below;



2. Click 

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



4. Add the new Group Name and then click Add Group

5. You will then be taken back to the main Users/Groups screen and will be presented with the following confirmation message;

Created new Group

6.2. Editing a Group:

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

2. Click Edit Group

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

4. Amend the details and then click Update Group

5. You will then be taken back to the main Users/Groups List screen and presented with the following confirmation message;

Updated Group

6.3. Deleting a Group:

Note: Group removal will delete the user associations, whether or not they are used in agreements.

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

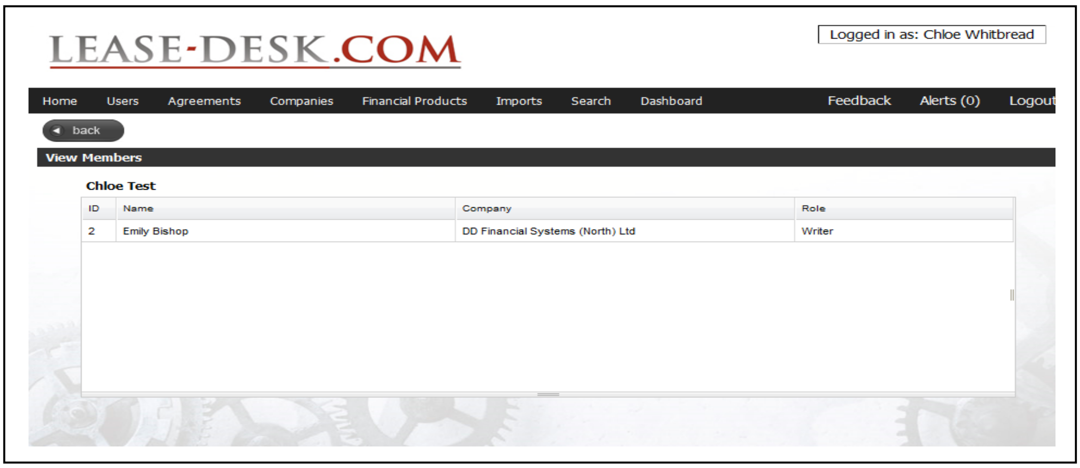
3. You will then be presented with the confirmation pop up. Select OK to continue with deletion or Cancel to cancel action.

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

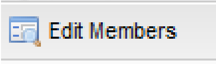
6.4. Viewing a Group:

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

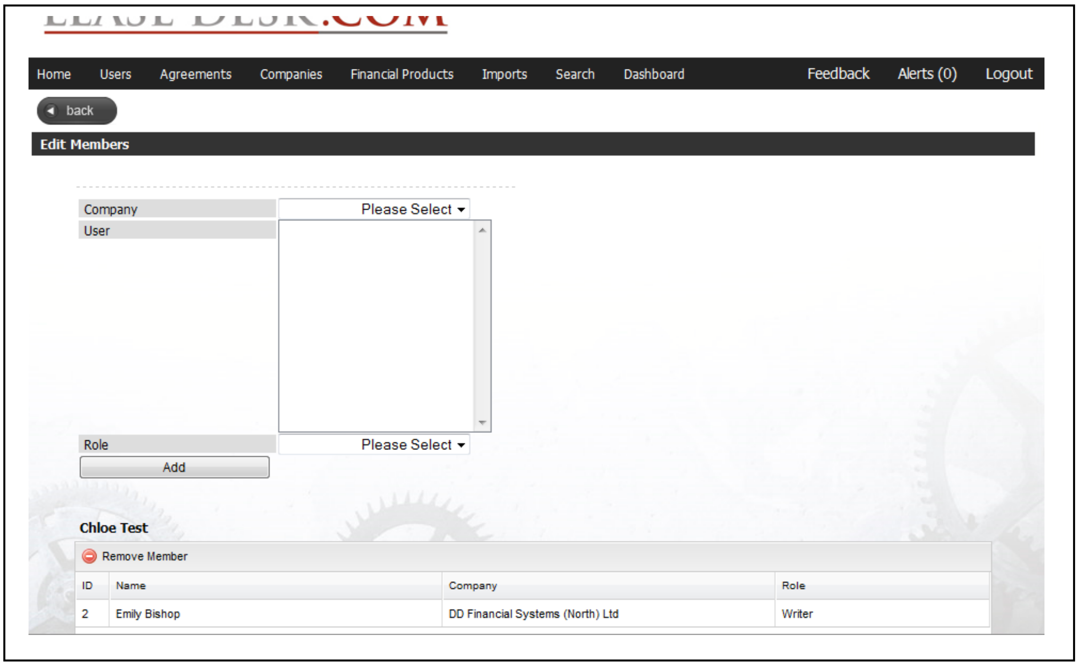
3. You will then be presented with the following View Members screen;



6.5. Editing Members:

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

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

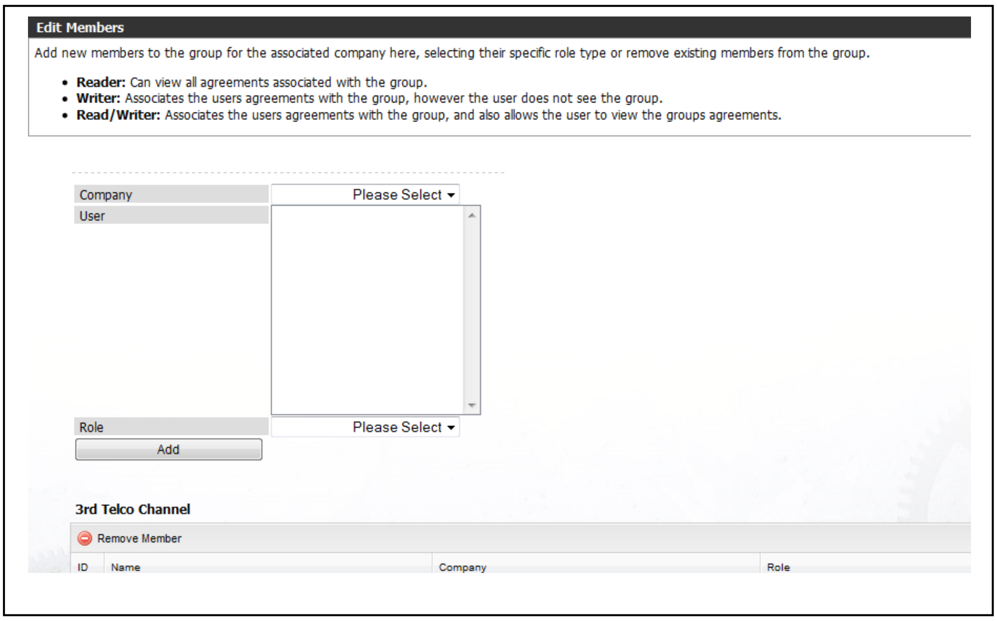


3. Select the Company from the drop down box which will bring up the users within that Company.

4. Highlight the required User, and then select a Role from the drop down menu, as indicated on the following page.

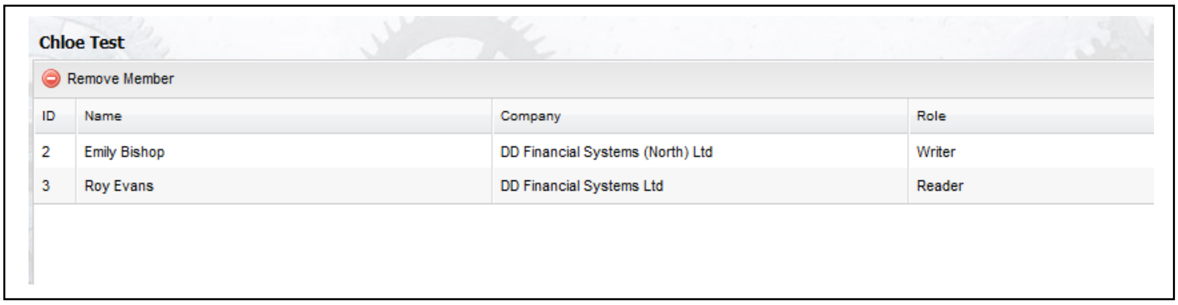
Note: The Role Definitions are as follows;

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



6. Click 

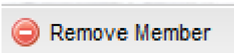
7. The User will then be added to the group as a member and displayed in the table at the bottom of the screen as per below;



Chloe Test

Remove Member

ID	Name	Company	Role
2	Emily Bishop	DD Financial Systems (North) Ltd	Writer
3	Roy Evans	DD Financial Systems Ltd	Reader

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

9. You will then receive a confirmation message, click OK to continue with deletion or Cancel to cancel the action.

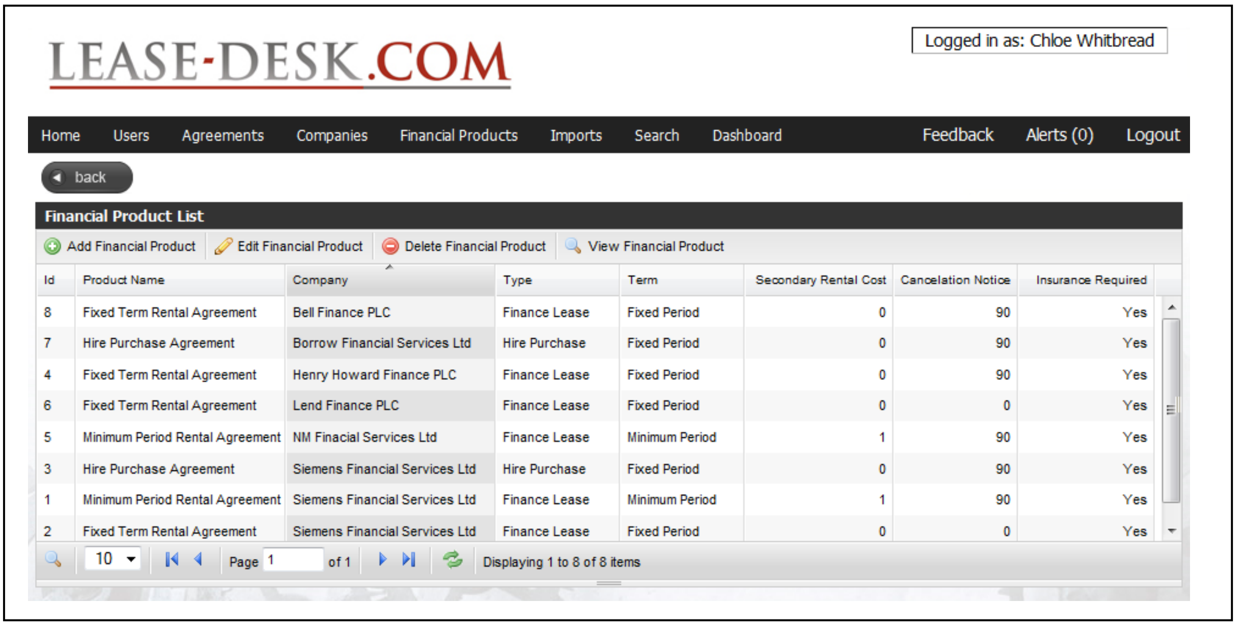
10. You will then be taken back to the main Users/Groups list screen.

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

7.1. Adding a Financial Product:

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

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



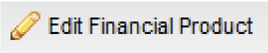
Id	Product Name	Company	Type	Term	Secondary Rental Cost	Cancelation Notice	Insurance Required
8	Fixed Term Rental Agreement	Bell Finance PLC	Finance Lease	Fixed Period	0	90	Yes
7	Hire Purchase Agreement	Borrow Financial Services Ltd	Hire Purchase	Fixed Period	0	90	Yes
4	Fixed Term Rental Agreement	Henry Howard Finance PLC	Finance Lease	Fixed Period	0	90	Yes
6	Fixed Term Rental Agreement	Lend Finance PLC	Finance Lease	Fixed Period	0	0	Yes
5	Minimum Period Rental Agreement	NM Finacial Services Ltd	Finance Lease	Minimum Period	1	90	Yes
3	Hire Purchase Agreement	Siemens Financial Services Ltd	Hire Purchase	Fixed Period	0	90	Yes
1	Minimum Period Rental Agreement	Siemens Financial Services Ltd	Finance Lease	Minimum Period	1	90	Yes
2	Fixed Term Rental Agreement	Siemens Financial Services Ltd	Finance Lease	Fixed Period	0	0	Yes

3. Click **Add Financial Product**

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

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

7.2. Editing a Financial Product:

1. Highlight the required Financial Product and click 

2. You will then be presented with the 'Edit Financial Product' screen.

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

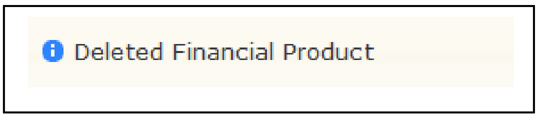
7.3. Deleting a Financial Product:

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

1. Highlight the required Financial Product and click 

2. You will then be presented with a confirmation message. Select OK to continue with the deletion or Cancel to cancel the action.

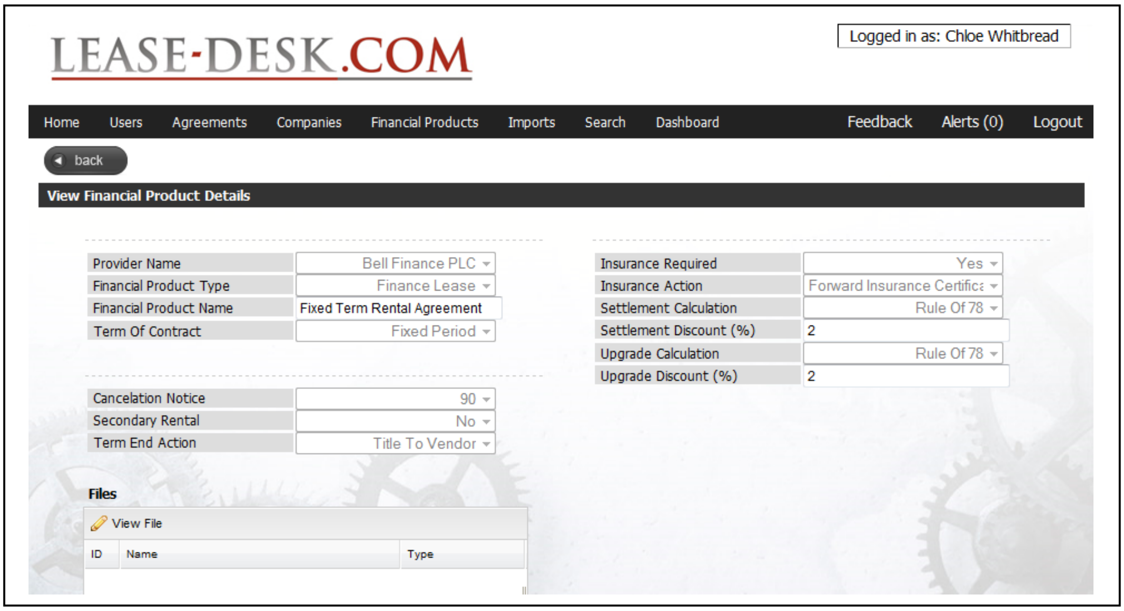
3. Once the deletion has been confirmed, you will be taken back to the main Financial Products List screen and you will be presented with the following confirmation message;



7.4. Viewing a Financial Product:

1. Highlight the required Financial Product and click View Financial Product

2. You will then be presented with the View Financial Product screen as indicated below;

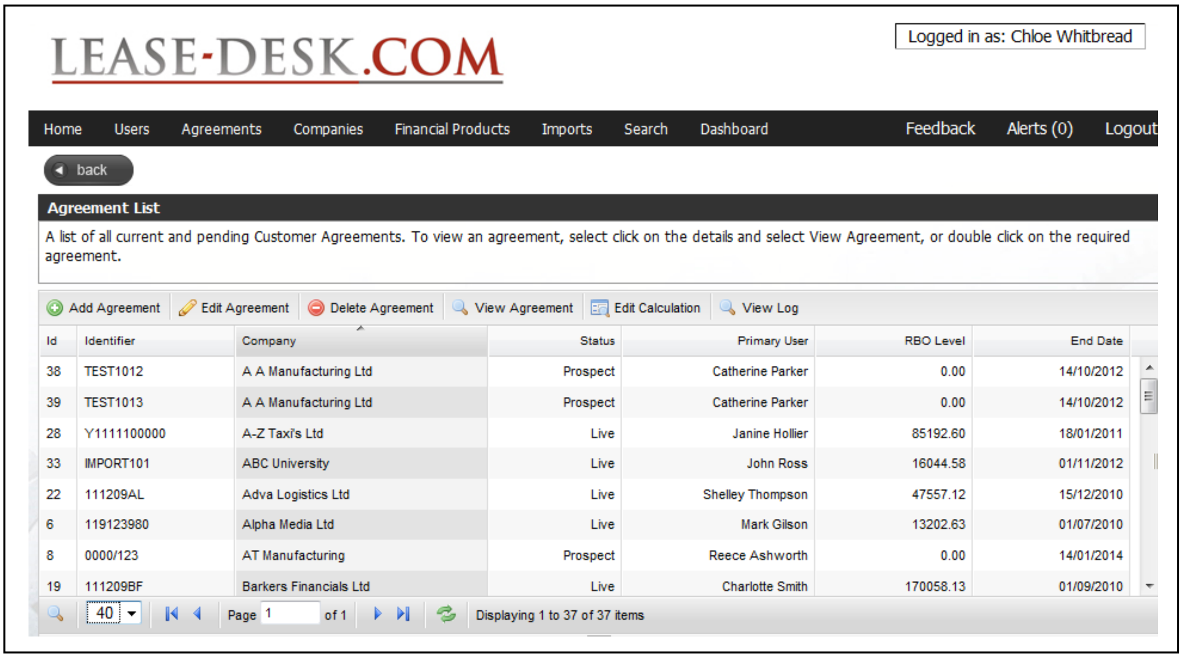


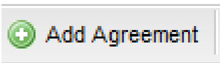
8. Agreements Screen: Adding, Editing, Viewing, Deleting and Viewing Audit Log

8.1. Adding an Agreement (Live):

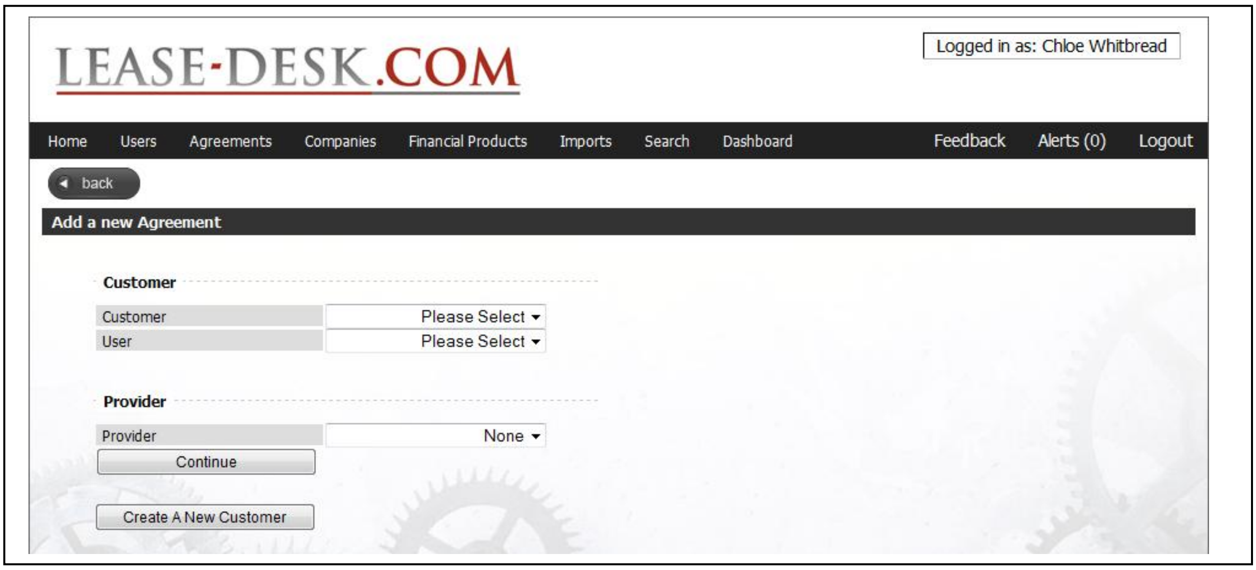
1. Select Agreements from the top main menu.

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



3. Click 

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



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

Note: The Company, User, Vendor, Primary Users and Financial Product will need to be set up on the system prior to adding an agreement. Click 'Create a New Customer' to take you to the relevant screen if required.

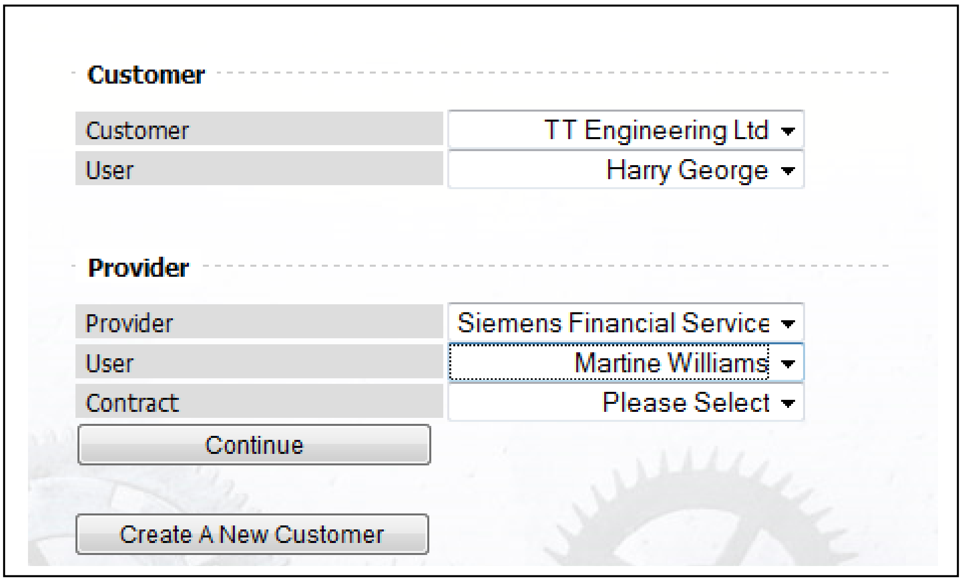
Customer:

- **Customer**
- **User (at Customer)**

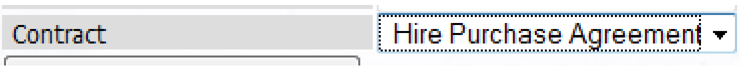
Provider:

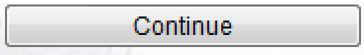
- **Provider**
- **User (at Provider)**

As indicated below:

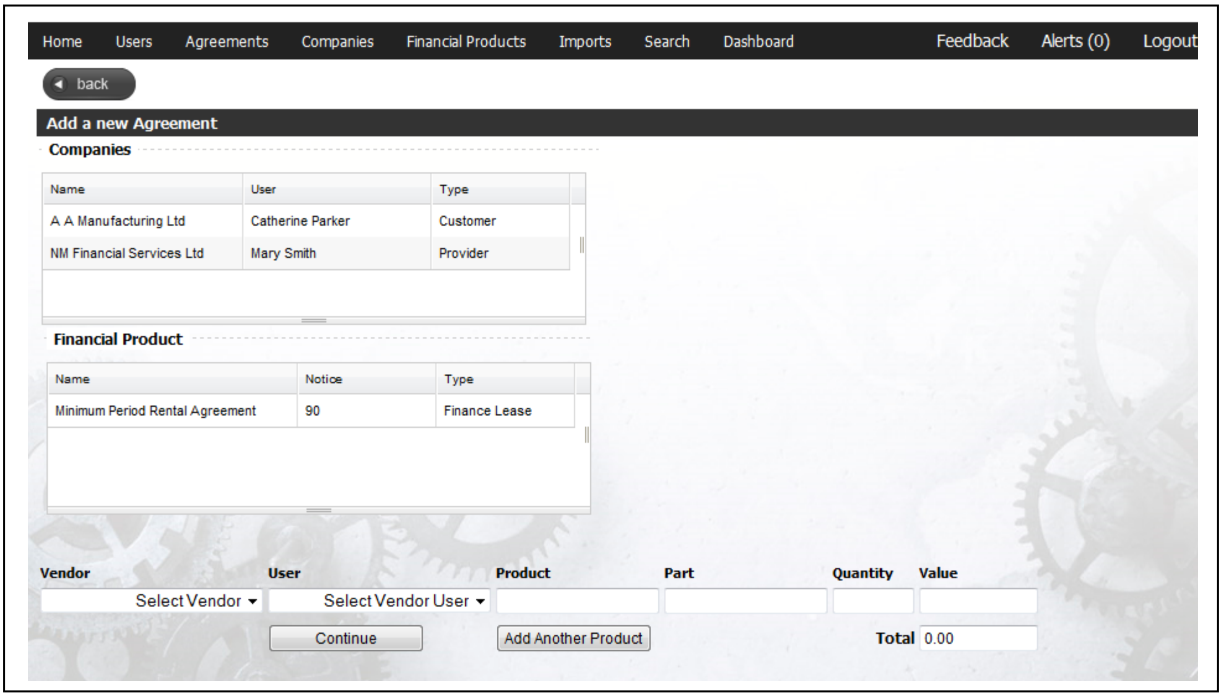


6. This will then generate a further drop down menu for the Financial Product type associated with the chosen Provider, as indicated below;

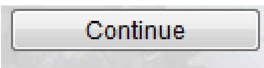


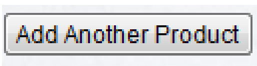
7. Then click 

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



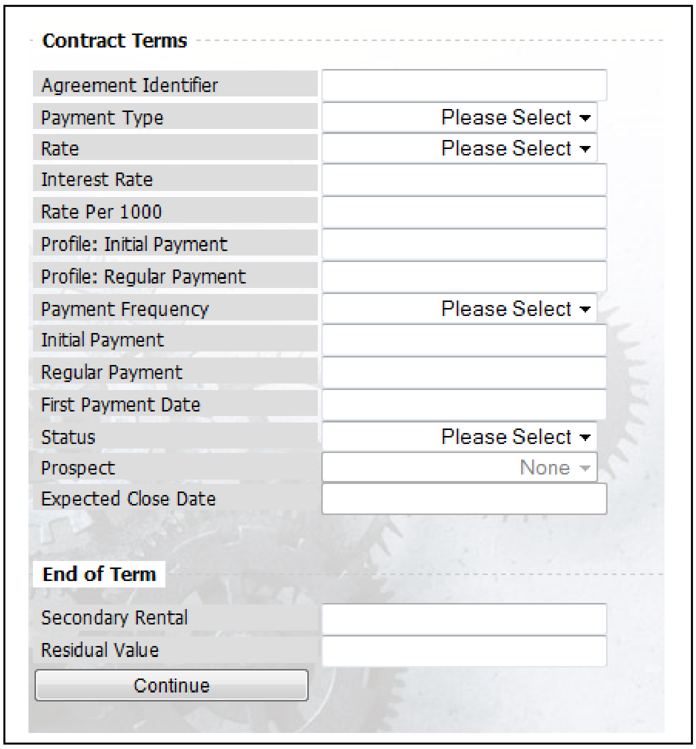
9. Next, complete the Vendor and User (if known), product name and/or part number, quantity and value.

10. Click 

if complete or 

to add an additional product (repeating previous step).

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



Contract Terms

Agreement Identifier	
Payment Type	Please Select
Rate	Please Select
Interest Rate	
Rate Per 1000	
Profile: Initial Payment	
Profile: Regular Payment	
Payment Frequency	Please Select
Initial Payment	
Regular Payment	
First Payment Date	
Status	Please Select
Prospect	None
Expected Close Date	

End of Term

Secondary Rental	
Residual Value	

Continue

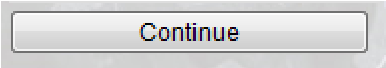
14. Fill in the following details;

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

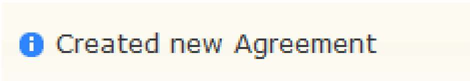
  Note: Lease-Desk will then calculate the initial and regular payments from the information previously added above and product information at the Vendor stage.

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

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

15. Click 

16. You will then be taken back to the main Agreements List and will be presented with the following confirmation message;



8.2. Adding an Agreement (Prospect):

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

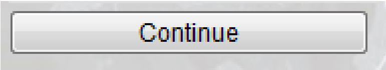
Note: If using as a quoting tool and no provider is known at this stage, select ‘None’ from the Provider drop down menu.

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

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

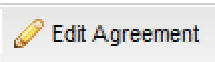
2. When you get to the ‘Contract Terms’ (as indicated in point 14 in 8.1), enter the following information;

- Agreement Identifier (if known)
- Payment Type: Advance or Arrears
- Rate: Interest Rate or Rate per Thousand
  Interest Rate: or
  Rate per Thousand:
- Profile: Initial Payment (whether it’s 1 or 3 payments)
- Profile: Regular Payment (how many remaining payments after initial)
- Payment Frequency: Monthly, Quarterly or Annually
- Status: Prospect
- Prospect: None, Quote, Proposed, Referral, Accepted, Declined, Purchase Order, Sent for Payment, Win.
- Expected Close Date:

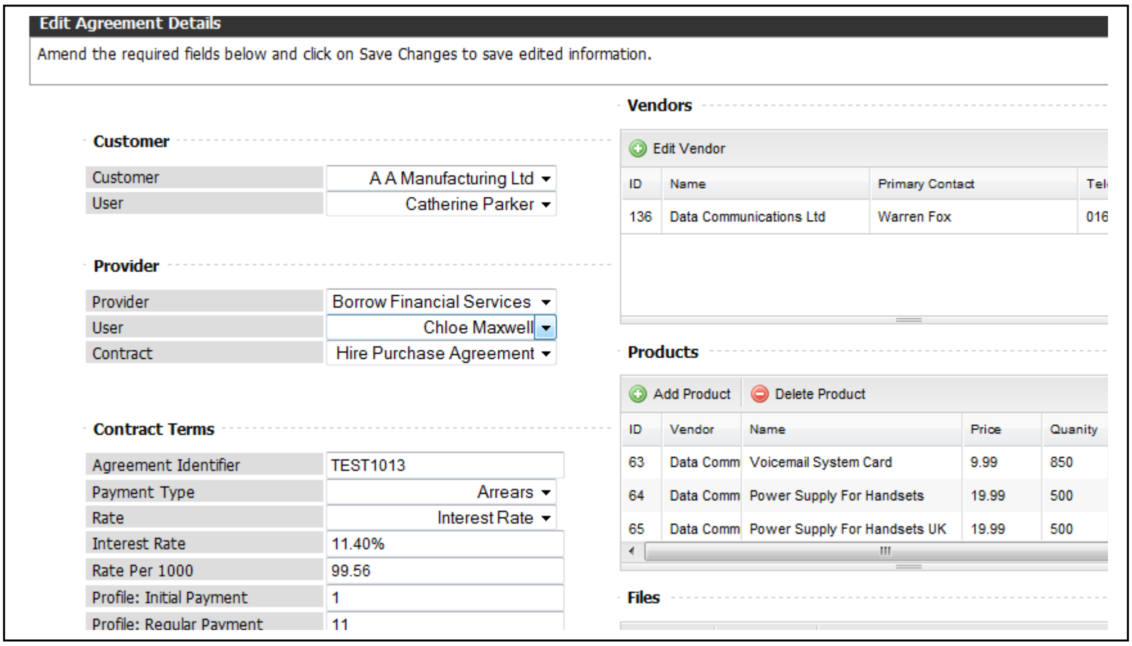
3. Then click on 

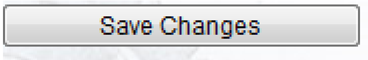
4. You will then be taken back to the main Agreements List and will be presented with the following confirmation message;

8.3. Editing an Agreement (Live or Prospect):

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

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



4. You are then presented with various tables you are able to edit. Once details have been amended, click 

8.3.1 Editing a Vendor:

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

2. Click 

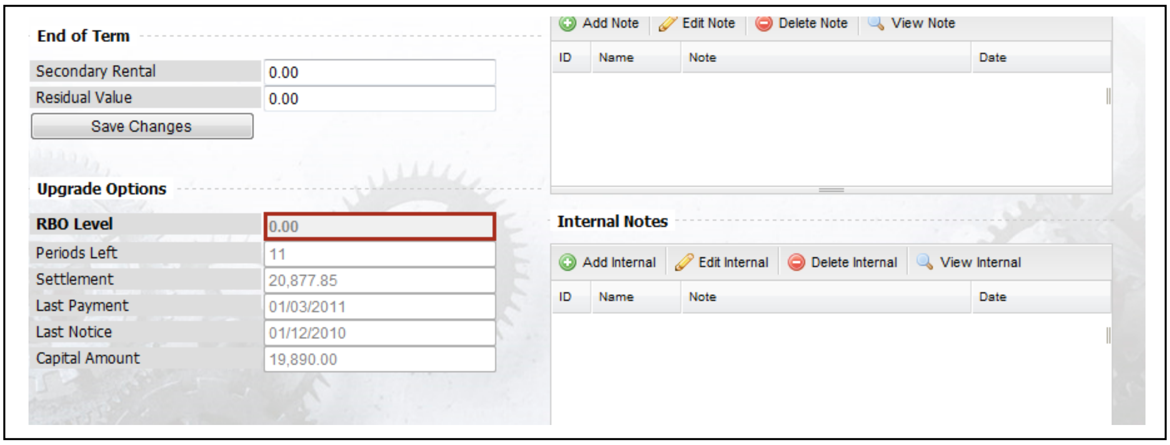
and follow chapter **6.2. Editing a Company:**

8.3.2 Adding and Deleting a Product:

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

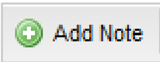
8.3.3 Adding, Viewing and Deleting a File:

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

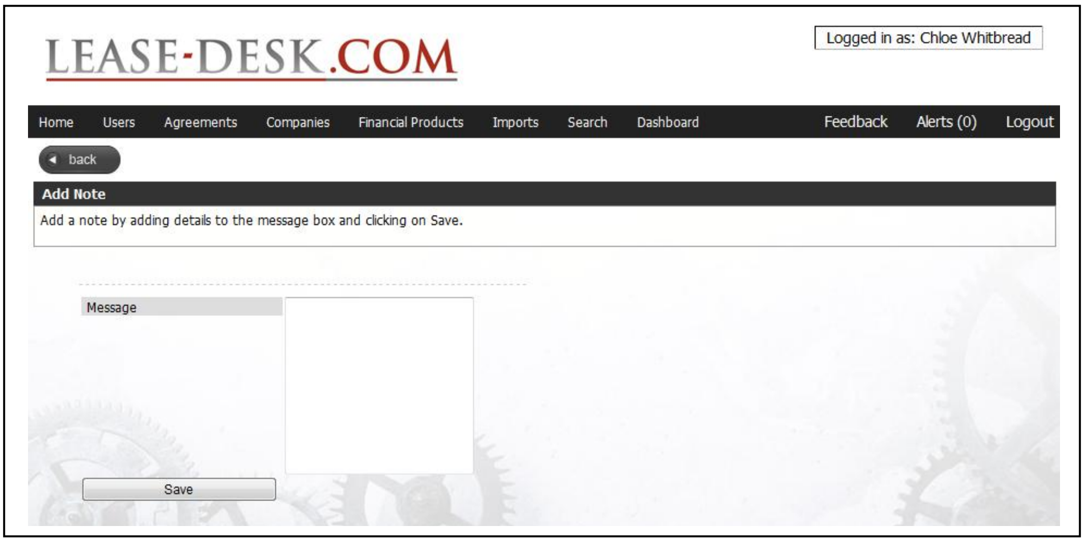


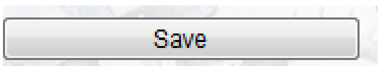
8.3.4 Adding a Note:

Note: When a note is added to an Agreement, an email alert will be generated to all members associated with the Agreement, including administrators.

1. Within the main 'Edit Agreement' screen, go to the Notes table.
2. Click 

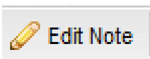
3. You will then be presented with the following 'Add Note' screen;



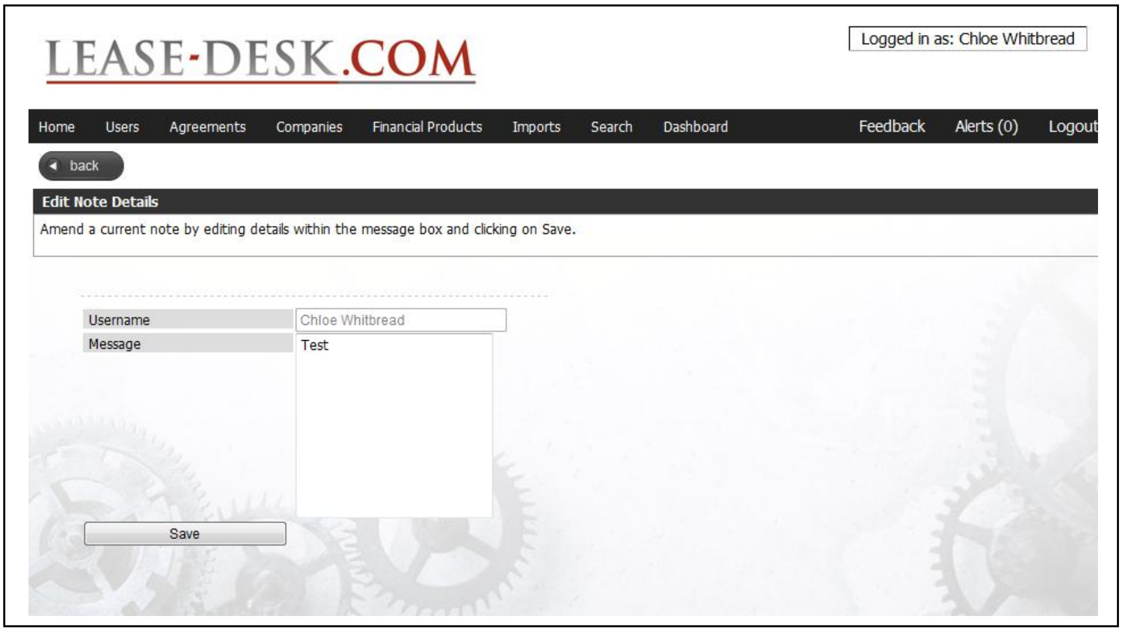
4. Type your message into the blank box
5. Click 

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

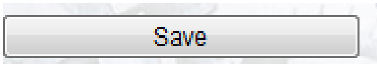
8.3.5 Editing a Note:

1. Highlight the required note from the Notes Table on the Edit Agreement screen.
2. Click 

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



4. Amend the Message

5. Click 

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

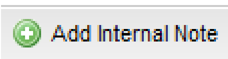
8.3.6 Deleting a Note:

1. Highlight the required note from the Notes Table on the Edit Agreement screen.

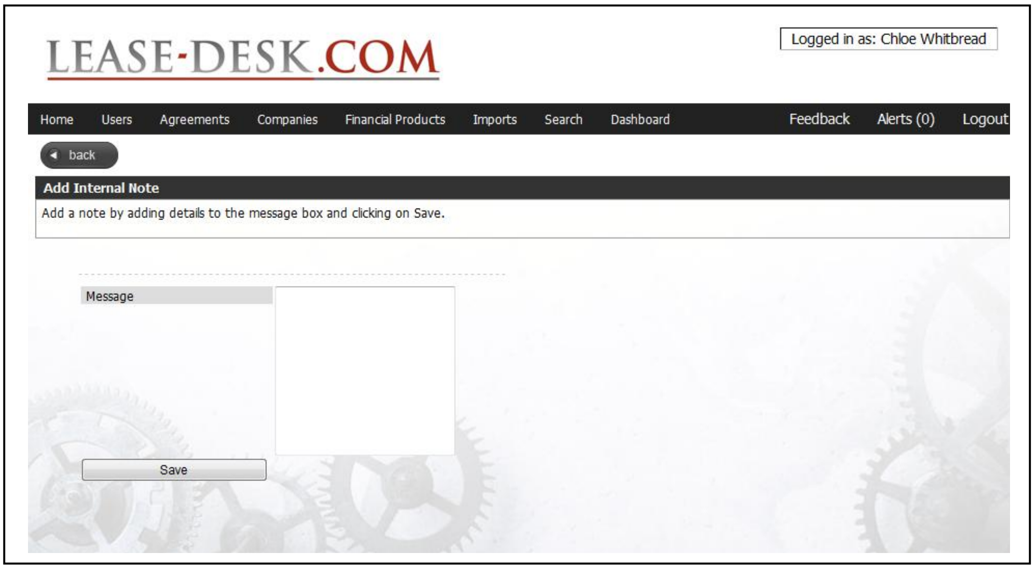
2. Click 

8.3.7 Adding an Internal Note:

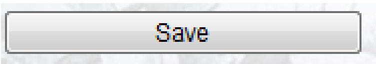
1. Go to the Internal Notes table within the 'Edit an Agreement' screen.

2. Click 

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



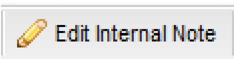
4. Enter your message in the box.

5. Click 

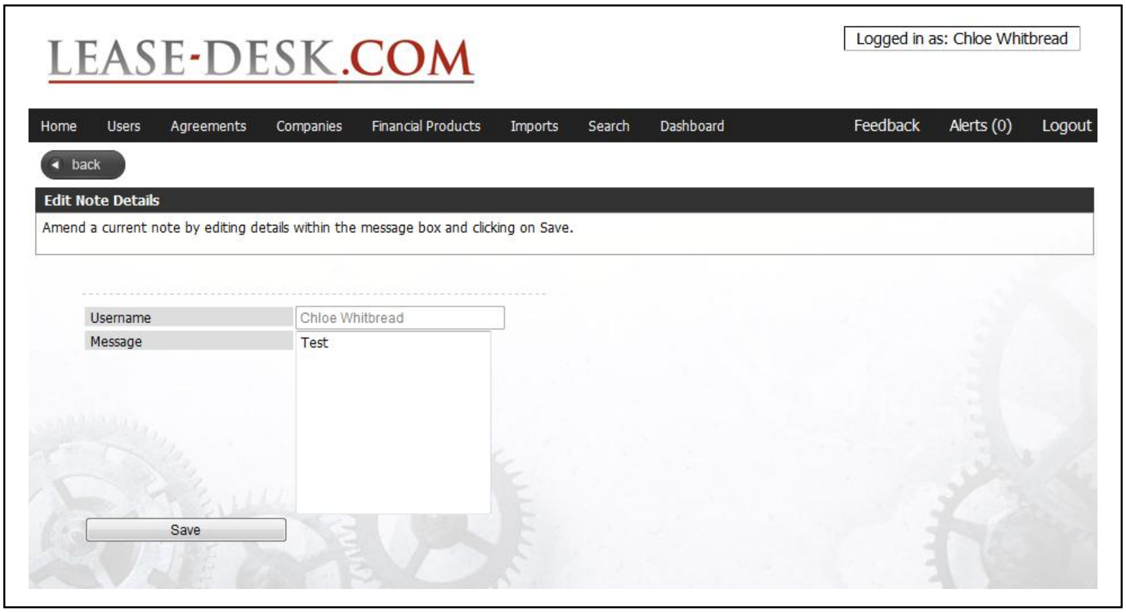
6. You will then be taken back to the main ‘Edit Agreement’ Screen.

8.3.8 Editing an Internal Note:

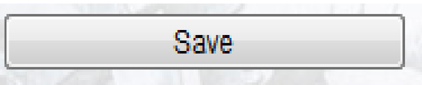
1. Highlight the required note from the Internal Notes Table on the ‘Edit Agreement’ screen.

2. Click 

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



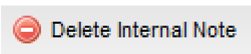
4. Amend the required message.

5. Click 

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

8.3.9 Deleting an Internal Note:

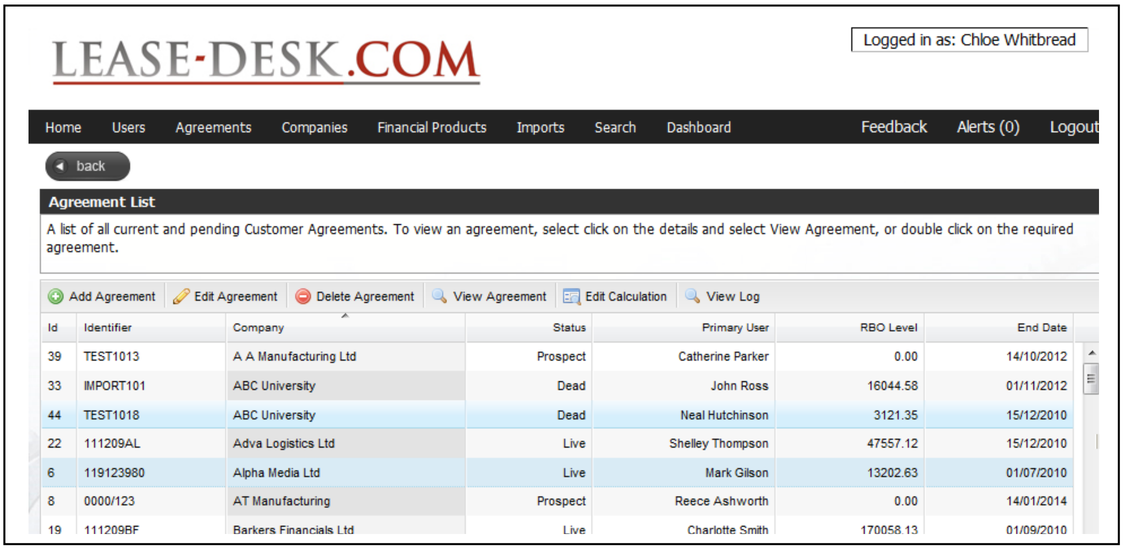
1. Highlight the required note from the Internal Notes Table on the 'Edit Agreement' screen.

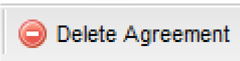
2. Click 

8.4. Deleting an Agreement:

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

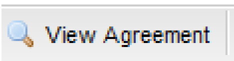
1. Highlight the required Agreement from the main Agreement Lists screen as indicated below;



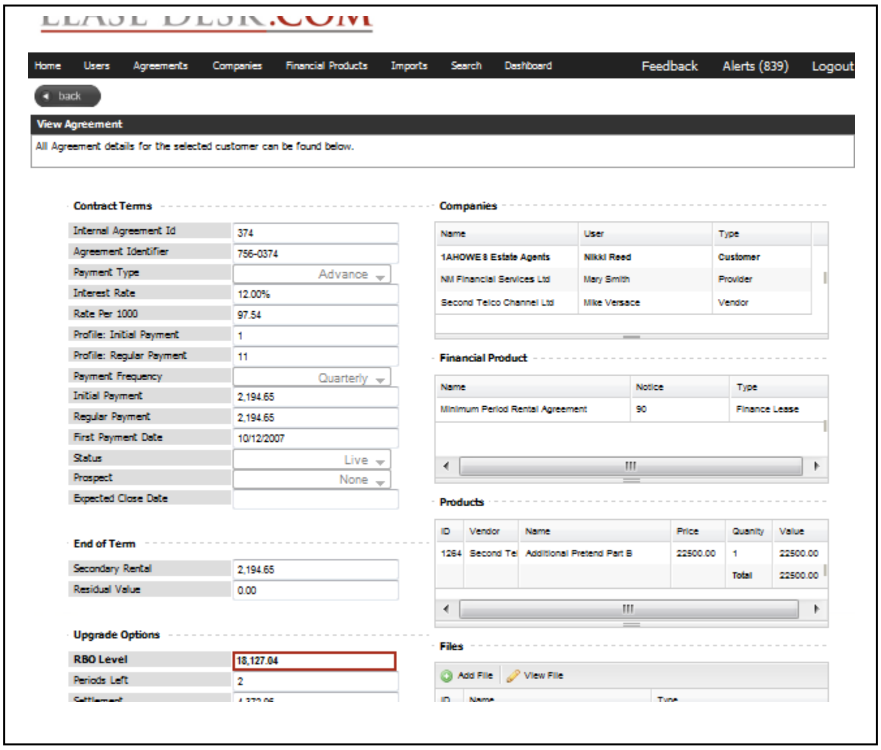
2. Click 

8.5. Viewing an Agreement:

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

2. Click 

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

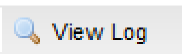


Note: Upgrade Options:

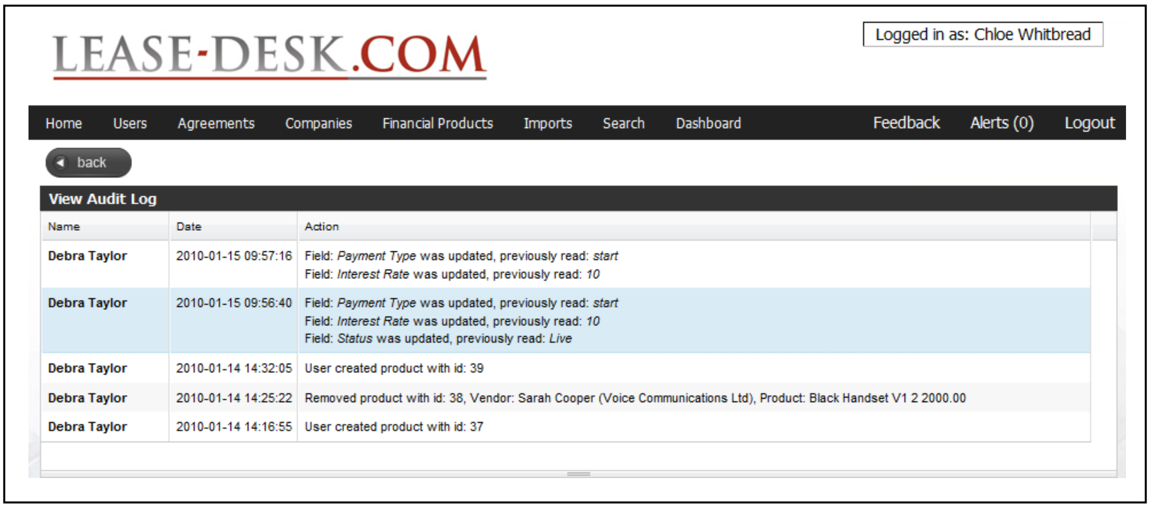
The RBO Level in bold (Repeat Business Opportunity), is the amount the customer has to spend on a technology refresh that will tie them into a new contract with the Vendor for the same length of time as their initial contract.

8.6. 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 on the following page;



9. Imports:

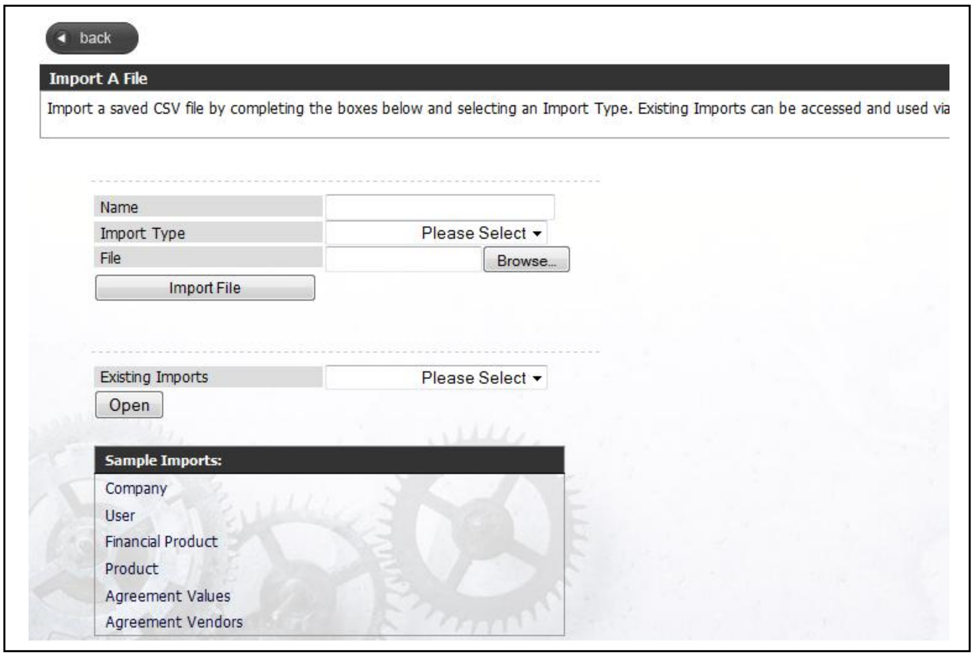
9.1. Viewing an Audit Log:

1. Lease-Desk has an Import functionality allowing users to quickly import information using a pre-saved CSV file matching the headers required for each imports, for example, Company, Users etc.

2. To Import a file, firstly select 

from the top main menu.

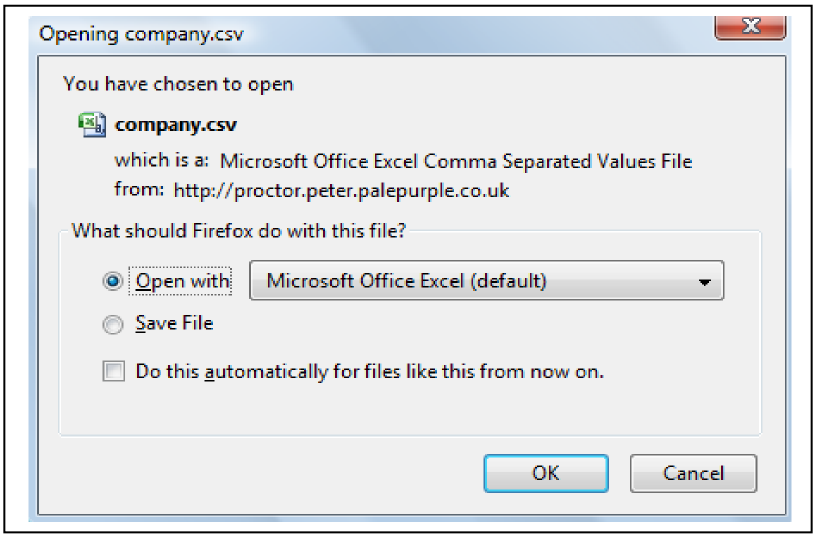
3. You will then be presented with the 'Import a File' screen as indicated on the following page;

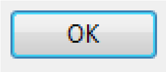


4. There are six different types of imports available within Lease-Desk. You will find the Sample Import templates on the 'Import a File' screen as indicated above. To select one, click on the title, for example 'Company'.

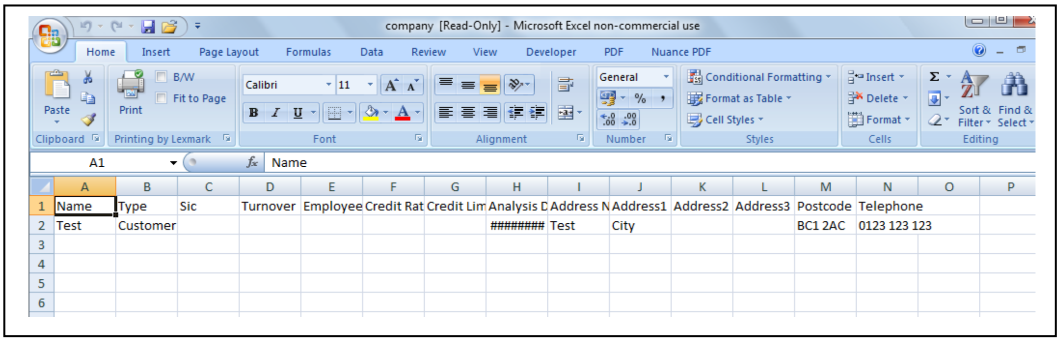
5. **Note:** Always ensure you follow the import order specified on the Import a File Page as above, i.e. Company first, and then Users, otherwise import will fail.

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



7. Click  to open with Excel

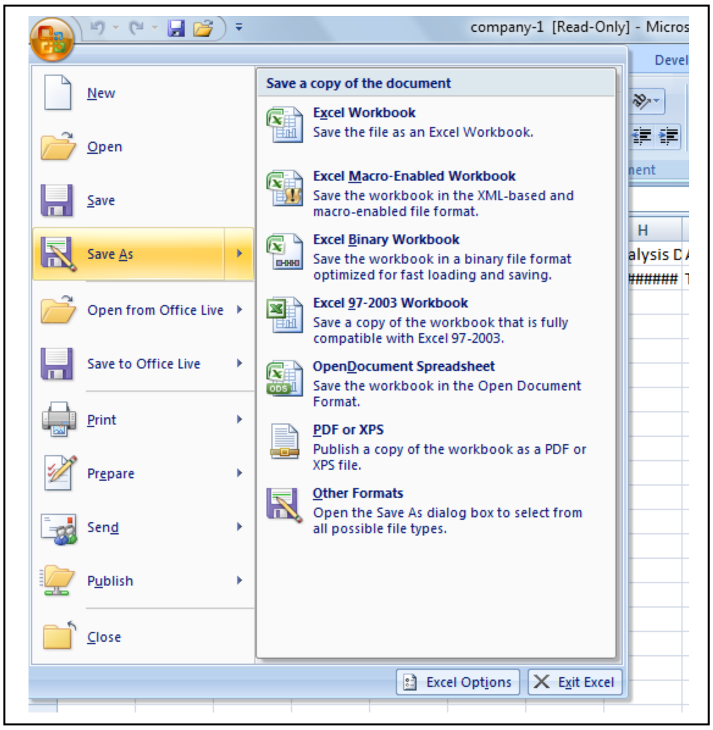
8. You will then be presented with the template with the headers required for the import, as per below;



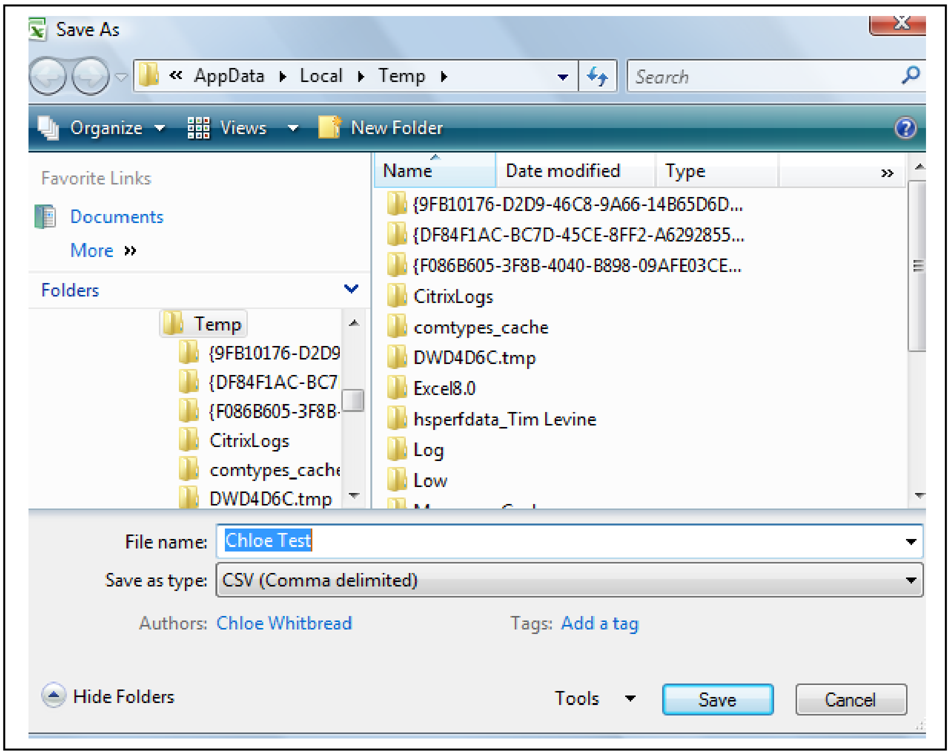
9. Add the import data for the specified import, following the template headings and test data.

10. Highlight the second line of test data and then click on delete (to ensure the test data doesn't get imported).

11. Once completed, click on 'Save As' as below;



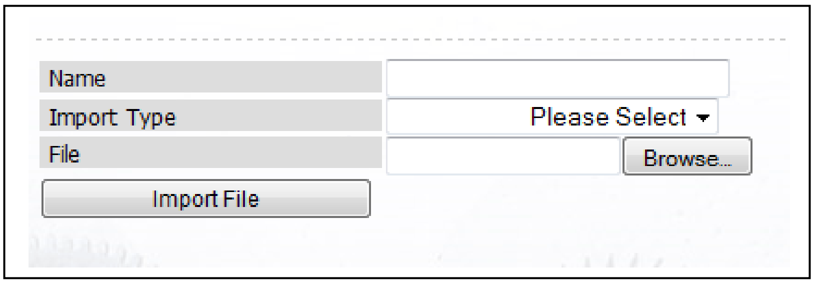
12. Enter a file name and save as a CSV file to your PC, as per below;



13. Go back to the 'Import a File' screen as indicated previously, ready to import you previously saved CSV File.

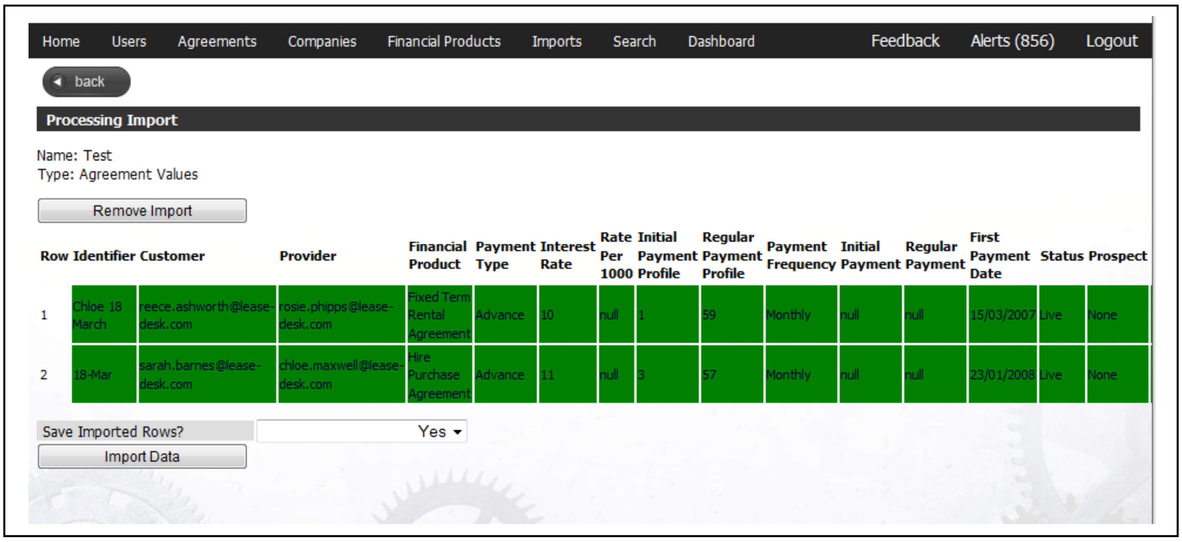
14. Fill in the following details;

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

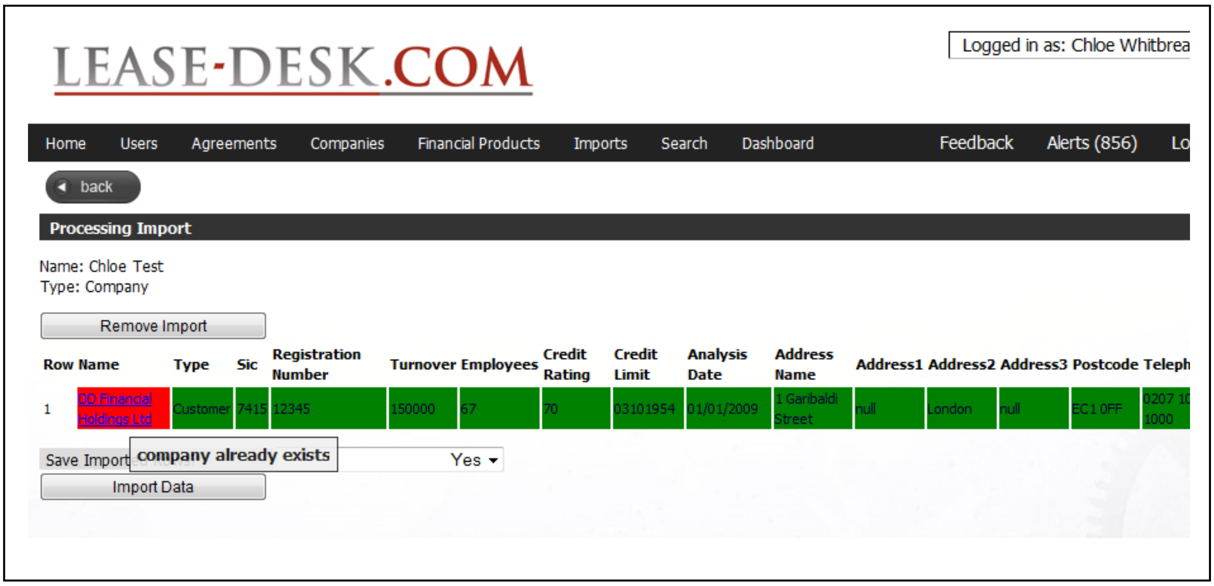


15. 14. Click 

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



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

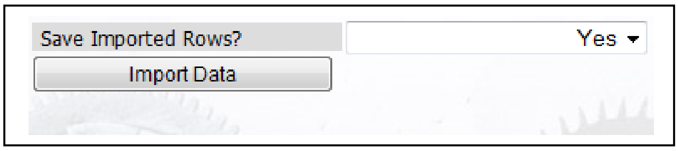


18. To edit the incorrect or duplicated data in red, click on the information and re-enter.

19. Then click 'Save'

20. To remove the import, click on 'Remove Import' (PP need to make a button)

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



1. To complete import, click 

2. You will then be taken back to the main imports screen
3. Continue the above process for every type of import required

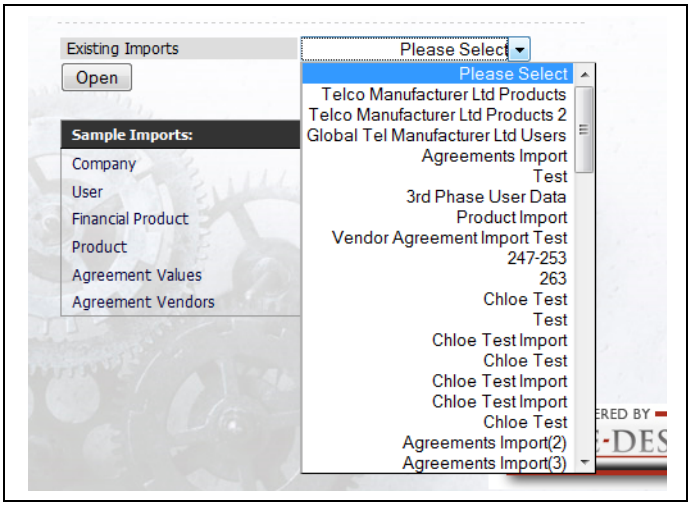
9.2. Using an Existing Import:

1. Go to 

from the top main menu.

2. You will be presented with the main 'Import a File' screen as indicated previously.

3. Go to the 'Existing Imports' dropdown menu and select one of the imports, as indicated below;



4. Click Open

5. You will then be presented with the existing import data, as illustrated below;

Company	Name	Part Number	Manufacture
Telco Manufacturer Ltd	5212/24/5312/24 Rmvbl DESI Card 5000 25	51012281	Mitel
Telco Manufacturer Ltd	Agent Portal 25 Agent Pack	54002649	Mitel
Telco Manufacturer Ltd	Agent Portal 50 Agent Pack	54002660	Mitel
Telco Manufacturer Ltd	Ent Manager SWA Enrollment.	54003727	Mitel
Telco Manufacturer Ltd	Gang charger, i640	51008198	Mitel
Telco Manufacturer Ltd	MAS Mobility for 3300 SWA: 2 YR	54004172	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA: 1 YR	54004167	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA: 2 YR	54004168	Mitel
Telco Manufacturer Ltd	MAS Msg & Conf for 3300 SWA: 4 YR	54004169	Mitel
Telco Manufacturer Ltd	Mobile Client licence Up 10 Users	54004103	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, i640, Europe	51008216	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, i640, NA	51008215	Mitel
Telco Manufacturer Ltd	Power supply, gang chgr, UK, Sing, HK	51008217	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr Mexico	51008226	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr UK, Sing, HK	51008223	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr, Europe	51008222	Mitel
Telco Manufacturer Ltd	Power supply, SVP svr, NA	51008221	Mitel
Telco Manufacturer Ltd	Set power supply, OAI Europe	51008210	Mitel
Telco Manufacturer Ltd	Set power supply, OAI, Mexico	51008214	Mitel
Telco Manufacturer Ltd	Set power supply, OAI, NA	51008209	Mitel

< Previous | Next >

Overwrite Company	No
Save Imported Rows?	No

Import Data

6. Complete the following details;

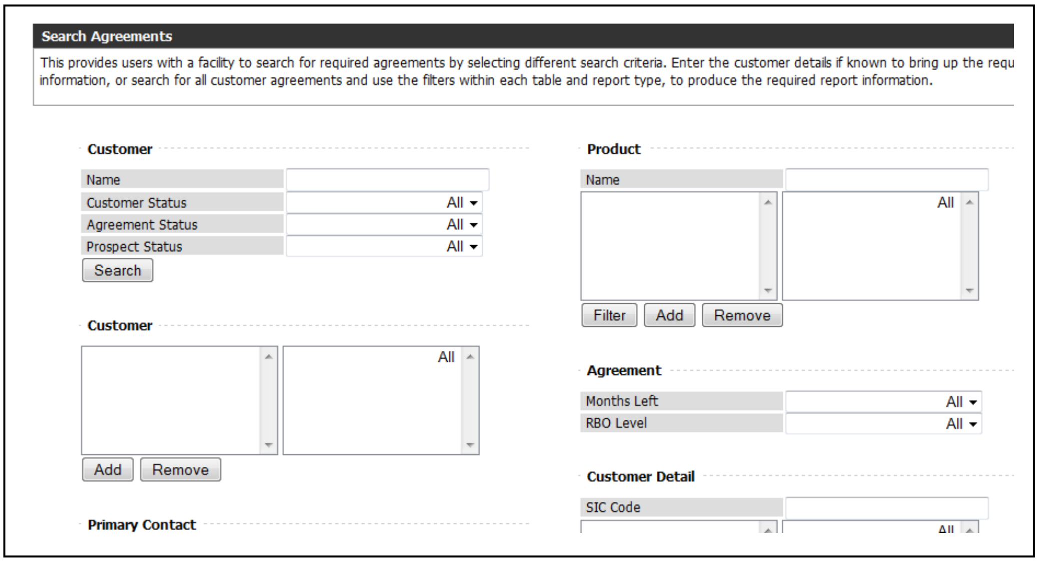
- Overwrite Company: Yes (if you want the same imported information to be imported against another Company, or No if not.
- Save Imported Rows: As previously shown, Yes to save the new import, No to remove once actioned.

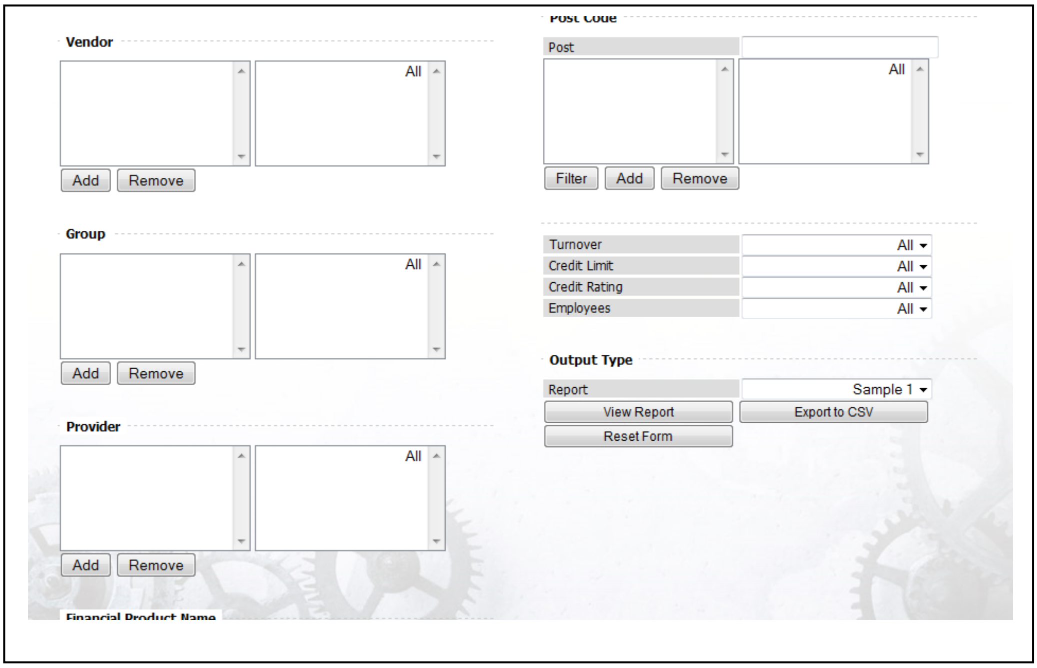
7. Click Import Data to complete import

10. 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;

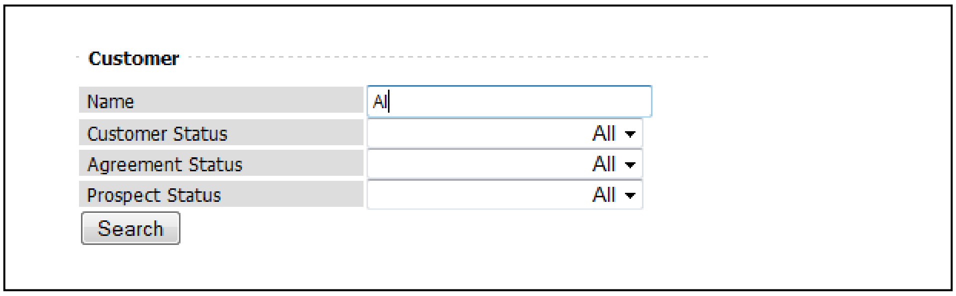




3. The Search Agreements screen, allows user to search for all agreement information by using the different filters.

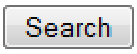
10.1. Searching for a Specific Customer Agreement Information:

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

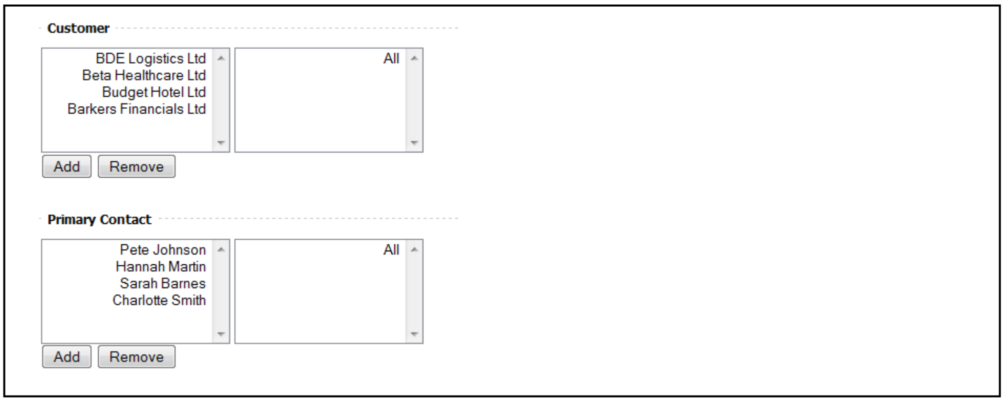


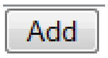
2. Complete the following details if required/known or keep as All;

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

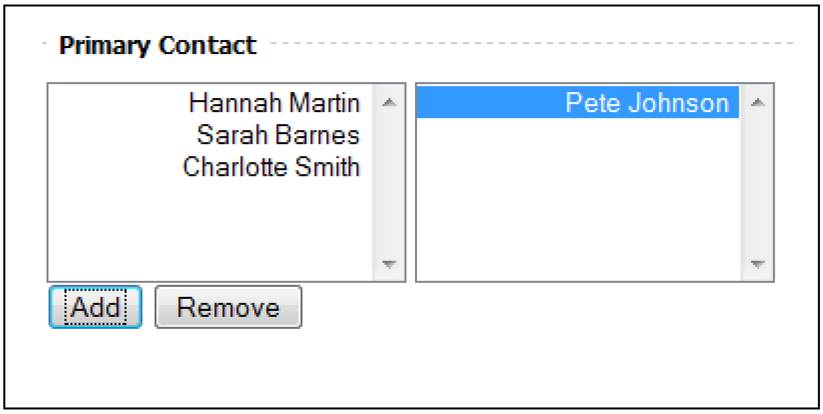
3. Click 

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



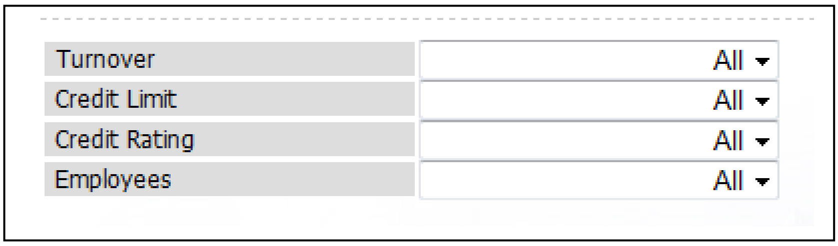
5. To include any of the produced data, within each table, highlight the required data, i.e. Primary Contact, and then click 

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

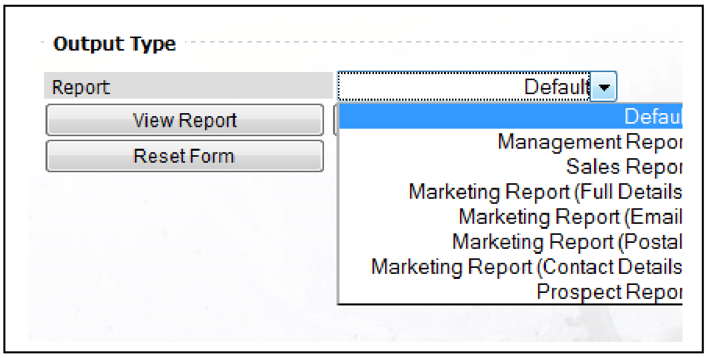


7. Carry on with each table required, following the previous step.

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



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



Note: There are 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:** ID, Customer Name, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

10. Once the report type has been selected, click on View Report or Export to CSV to view in CSV format.

10.2. 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 Search

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

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

11. Dashboard:

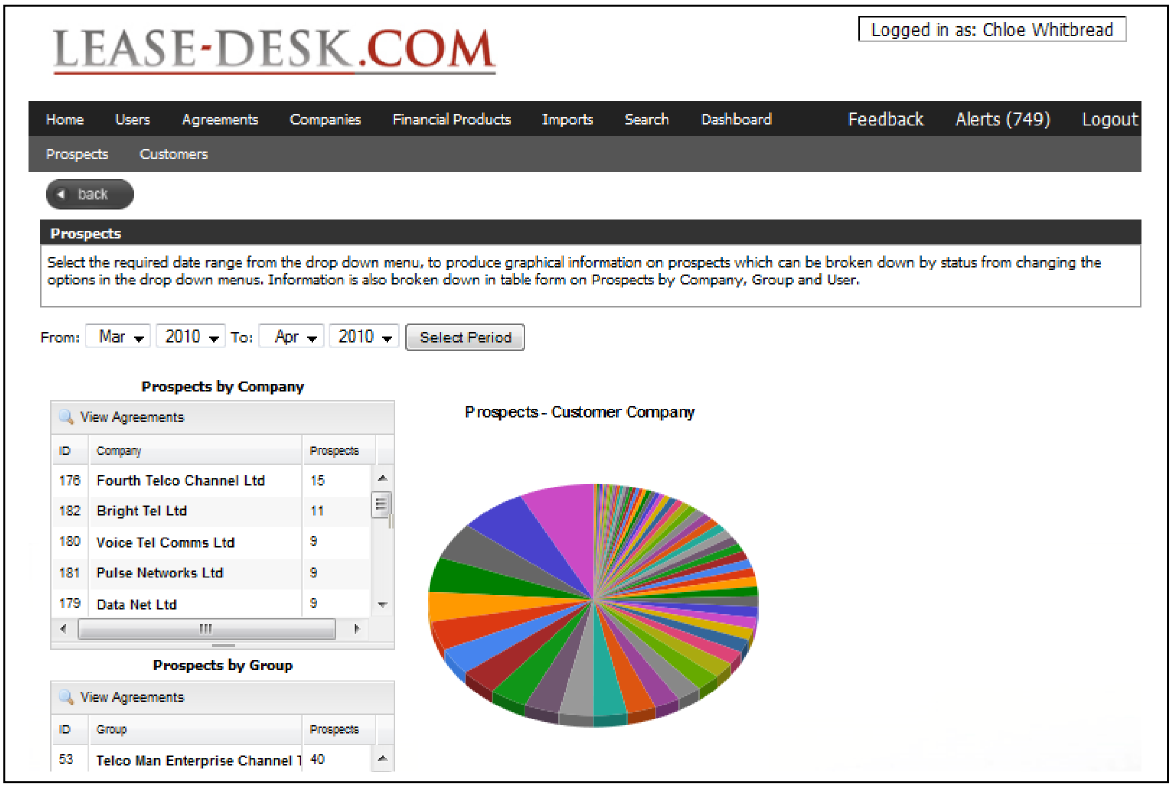
This screen provides users with a snap shot of their organisational live agreement and Prospect information determined by role type, for example Managers set as Main will be able to view all of their team's information in an instant.

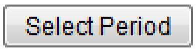
11.1. Prospects:

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

1. Go to Dashboard on the main top menu.

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



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

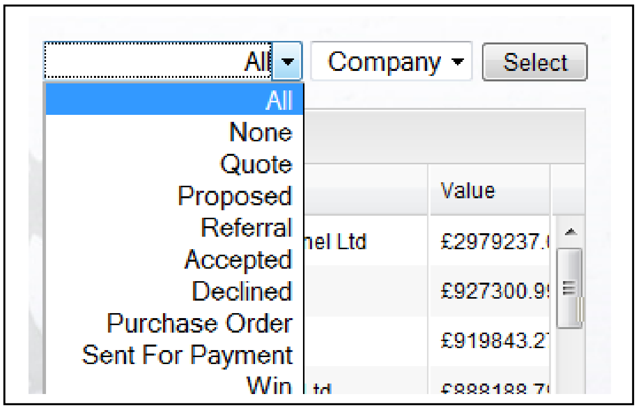
4. The data and graph presented on the page will then change as a result of the date ranges selected.

5. To view any of the information in the tables shown, highlight the required line of information and click 

. Alternatively, double click on the required line.

11.1.1 Viewing Top Prospect Information in Graphical Format:

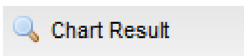
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



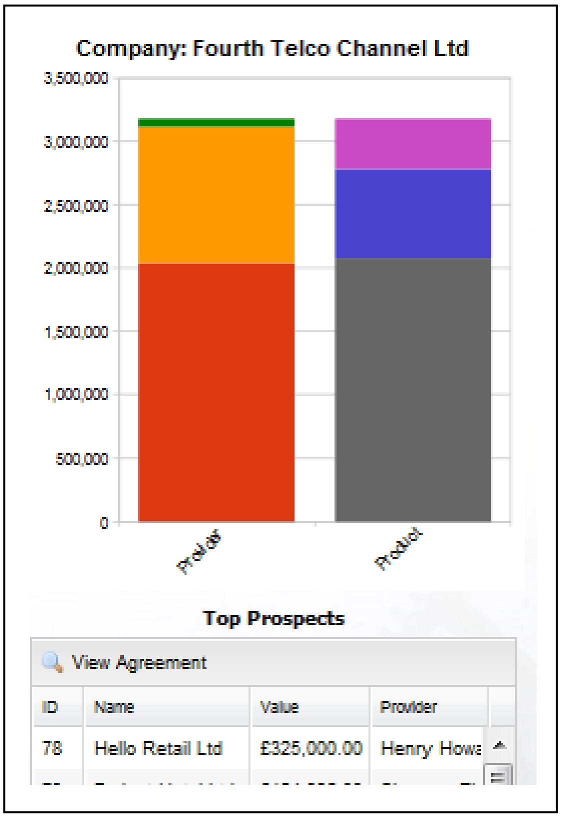
2. Select either User, Group or Company from the second drop down menu box.

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

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

5. To view the information in graphical format, click 

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



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

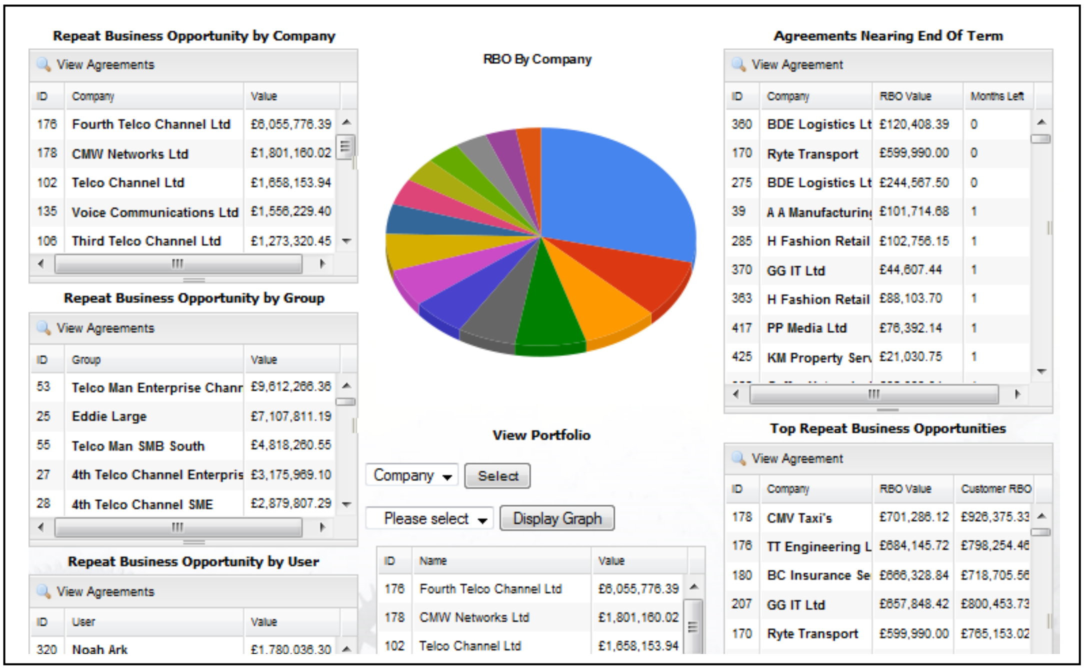
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

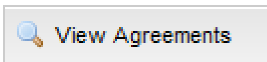
11.2. Customers:

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

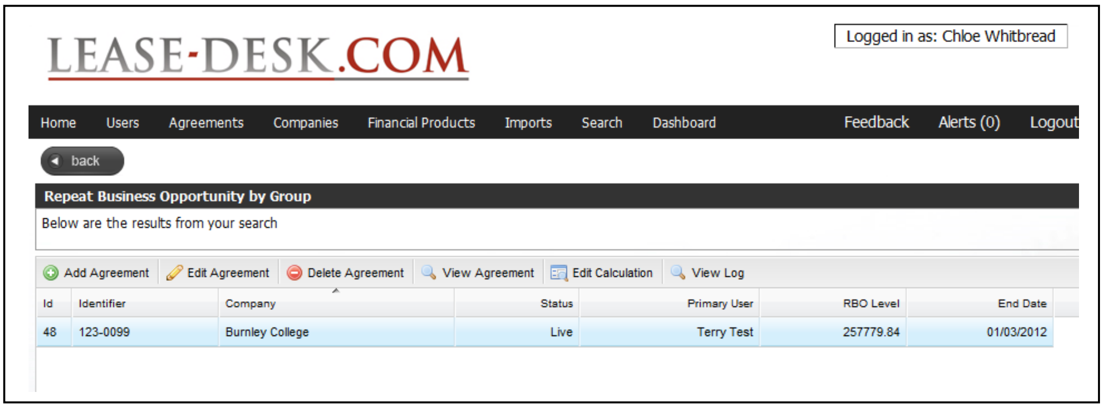
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- **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 

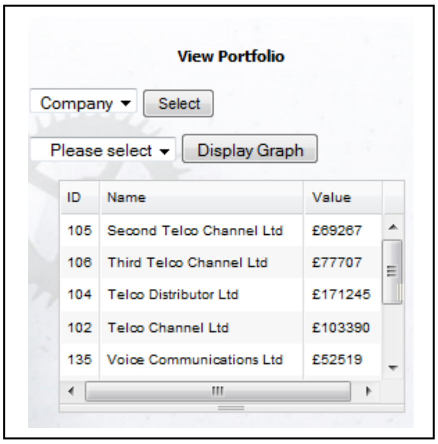
4. Dependent upon which option you select, you will then be presented with the individual Agreement Information in table format, as indicated below;



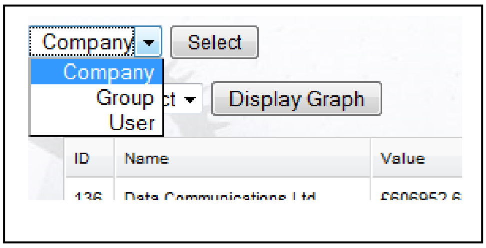
5. You then have the option to Add a completely new Agreement, Edit the Agreement, Delete the Agreement, View Agreement, and View Log. Refer back to Chapter 8 for how to do this.

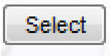
11.2.1 Viewing/Amending Portfolio Information:

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



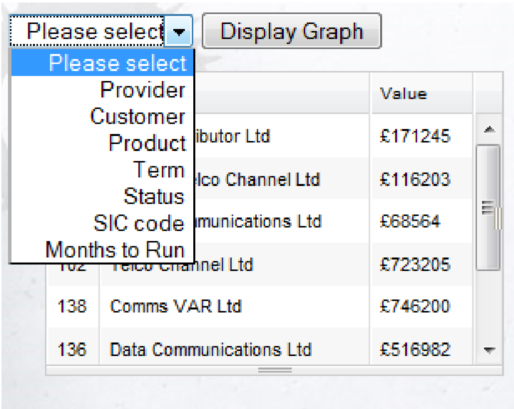
2. In the first drop down menu, select the required grouping option (Company, Group or User).

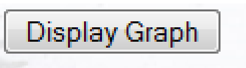


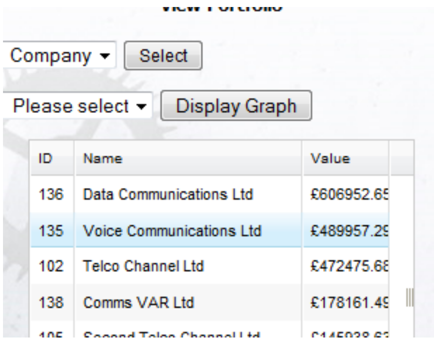
3. Click 

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

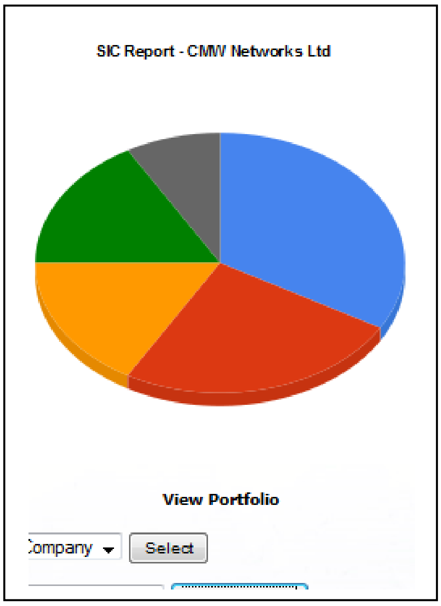
5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click 



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



12. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to vendor and administration users. As an administrator, you will be able to see all of the system generated alerts unless a user clicks 'Completed' as an action which will remove the alert from the list.

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.

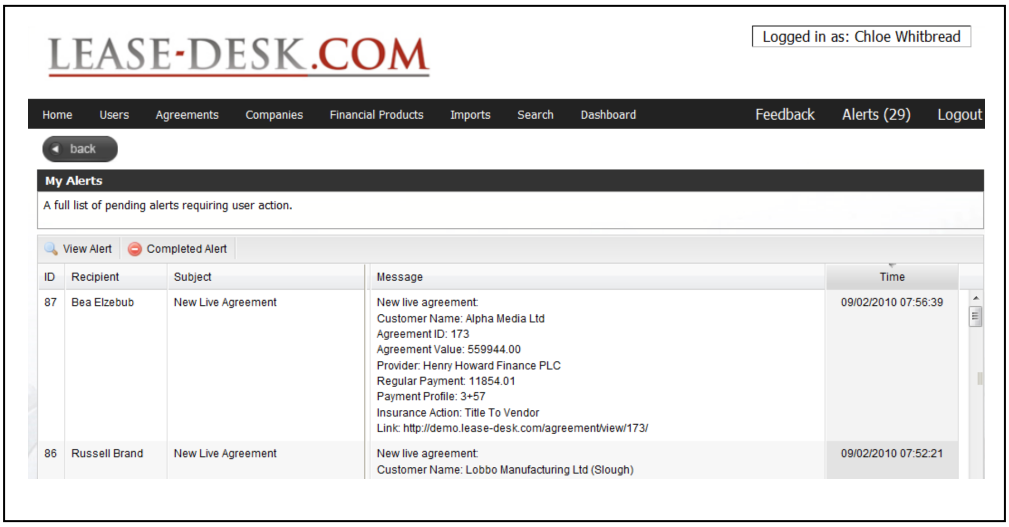
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

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 until completion.***
- ***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)***

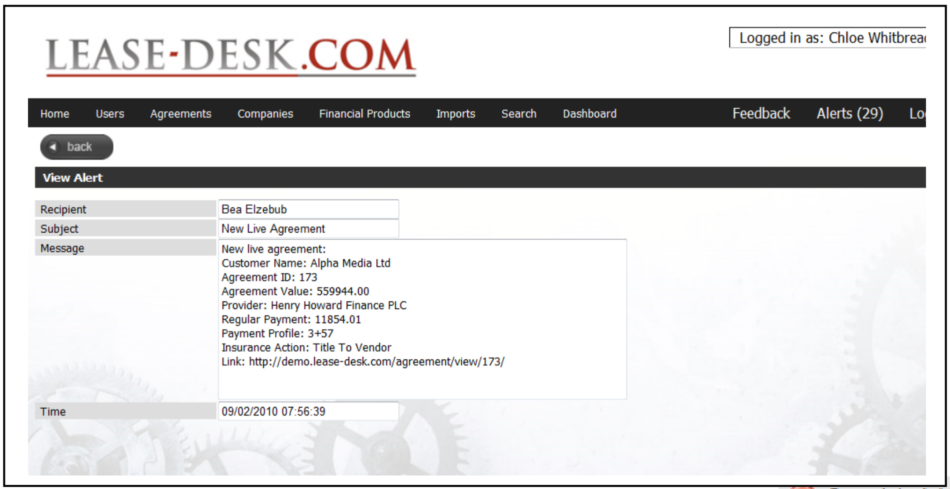
1. To view your individual user alerts, select Alerts (29) from the top menu.

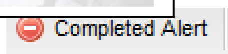
2. You will then be presented with the following 'My Alerts' screen as per below;



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

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



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

13. General Functionality:

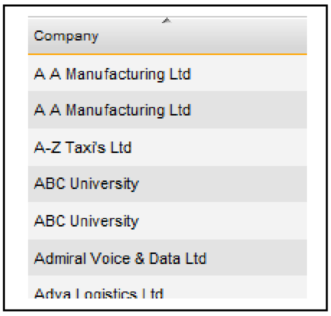
13.1. Sort:

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.

Before Sort

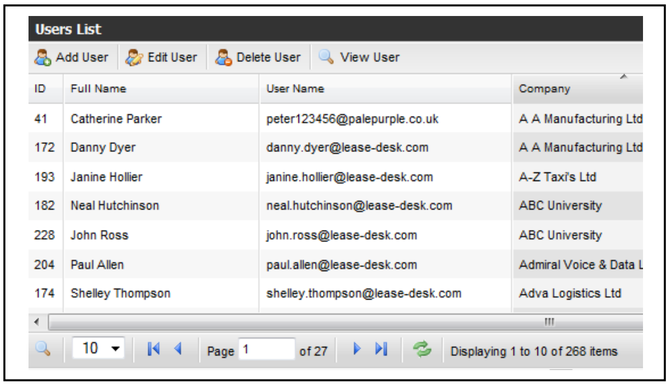
After Sort



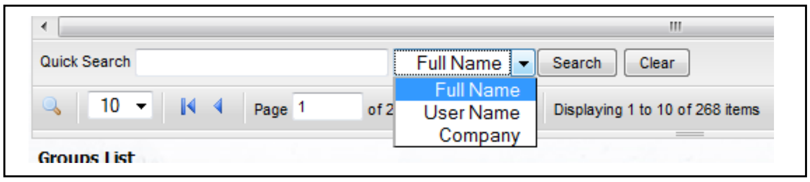
13.2 Quick Search:

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 user the quick search functionality, at the bottom of the screen, select the  icon.



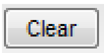
2. This will then bring up the quick search options for the screen you are in, as per below;



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.

13.3 Refresh:

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

13.4 Scrolling through records:

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

 Forward to next page of records

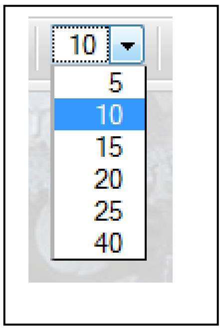
 Forward to end of records

 Go back to previous page of records

 Go to the start of the records

13.5 Changing the amount of records per view:

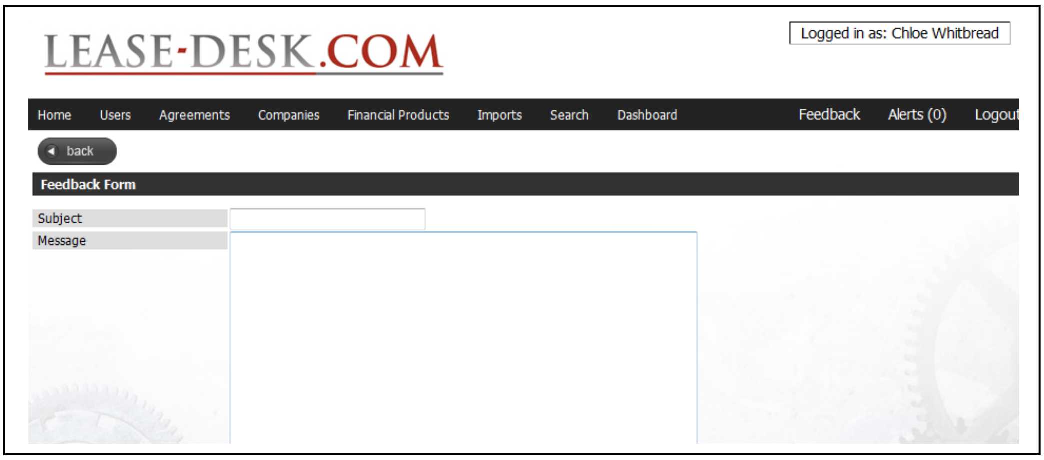
2. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



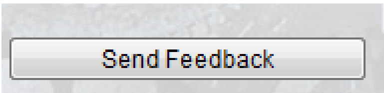
14. Feedback:

1. Users have the ability to contact the Lease-Desk administration team using the Feedback functionality. To action this, they will select Feedback from the main menu.

2. The user will then be then be presented with the ‘Feedback Form’ screen as indicated below;



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

7. Once completed, click 

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

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

15. Contact Details:

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

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

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