

# LEASE-DESK

## Main Access User Manual

### Version 2.1



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## **1. Introduction to Lease-Desk:**

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

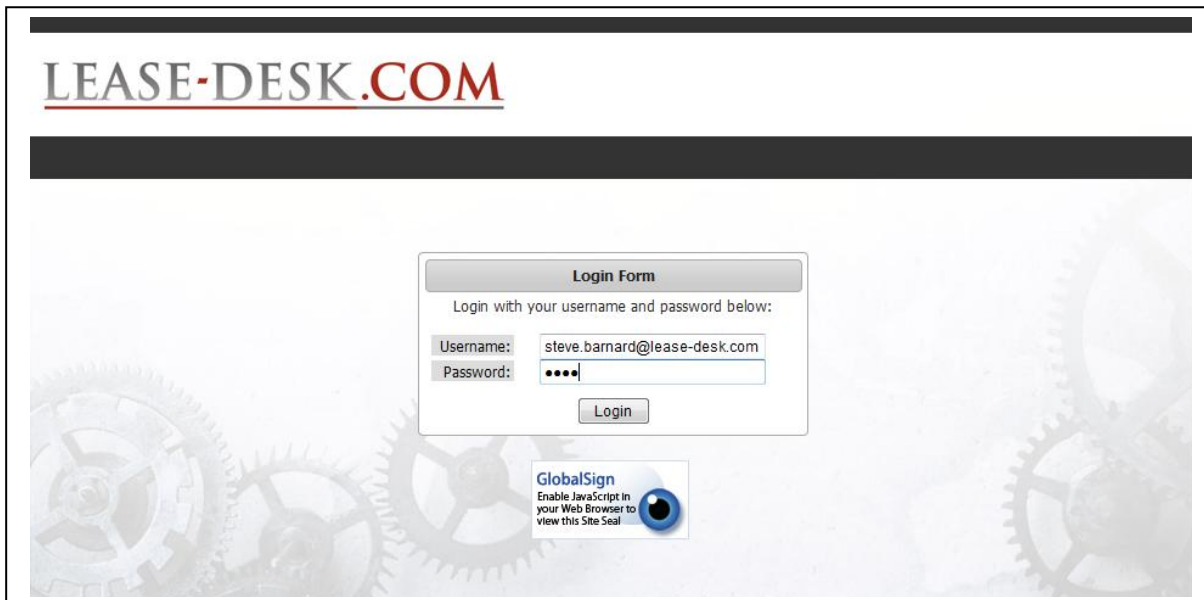
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will have full access to all live and prospect agreement information within your company, both on the agreements list page, search and dashboard and be able to edit certain features within each screen.

## 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.

A screenshot of a red rectangular login box. At the top, it says 'LEASE-DESK.COM' in white. Below that, there are two white input fields labeled 'USERNAME' and 'PASSWORD'. At the bottom, there is a dark grey button labeled 'CLIENT LOGIN' with the text 'CLICK HERE TO LOG INTO YOUR LEASE-DESK PROFILE' below it.

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

A screenshot of the Lease-Desk.com User Login page. The page has a white background with a dark grey header bar at the top containing the 'LEASE-DESK.COM' logo. Below the header, there is a large, faint background image of interlocking gears. In the center, there is a 'Login Form' box. Inside the form, it says 'Login with your username and password below:'. There are two input fields: 'Username:' with the value 'steve.barnard@lease-desk.com' and 'Password:' with masked characters '....'. Below these fields is a 'Login' button. At the bottom of the form, there is a 'GlobalSign' logo and a message: 'Enable JavaScript in your Web Browser to view this Site Seal'.

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

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

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

Logged in as: Steve Barnard | Feedback | Logout

## LEASE-DESK.COM

Agreements Search Dashboard Alerts (86)

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### Company Details

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

#### Company Information

Name:  Save Changes

Company Type:  Vendor

SIC Code:  (6420) TELECOMMUNICATIONS

Registration Number:

Turnover:

Employees:

Credit Rating:

Credit Limit:

Analysis Date:

#### Addresses

Add Address Edit Address Set As Main Delete Address

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

#### Files

Add File View File Delete File

ID	Name	Type
5	Demo Company Import.csv	Other

#### Groups

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

#### Providers

Associate Provider Delete Association

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

#### Users

ID	User Name	Full Name	Job Title	Type
371	steve.barnard@lease-desk.com	Steve Barnard	Sales Director	Main
377	jeremy.carse@lease-desk.com	Jeremy Carse	Account Manager SME South	Normal
375	mike.chaplin@lease-desk.com	Mike Chaplin	Account Manager Enterprise Team	Normal

#### Products

Add Product Edit Product Delete Product Print Products

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

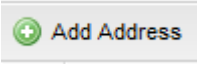
Quick Search:  Part Number Search Clear





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

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

#### 3.1.1. Adding an Address:

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

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

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

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

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

[back](#)

**Add Address To Company**

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

Address Name

Address Line 1

Address Line 2

Address Line 3

Postcode


Telephone

Save Details





Save Details

3. Fill in the full address details and click on

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





 Created a New Address

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

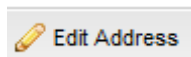
Addresses				
 Add Address  Edit Address  Set As Main  Delete Address				
ID	Name	Address	Post Code	Telephone
80	Lake View Drive	Sherwood Park, Nottin	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

### 3.1.2. Editing an Address:

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

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

2. Click on





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

Logged in as: Steve Barnard | Feedback | Logout

# LEASE-DESK.COM

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## Edit Address

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

Address Name	Main Office
Address Line 1	Unit 42 Sketherton Business Par
Address Line 2	Northampton
Address Line 3	Northamptonshire
Postcode	NN11 2EW
Telephone	01604 596569


Save Changes

4. Amend the required Address details and click on

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

Updated Address

### 3.1.3. Setting an Address as Main:

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

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

Updated Address

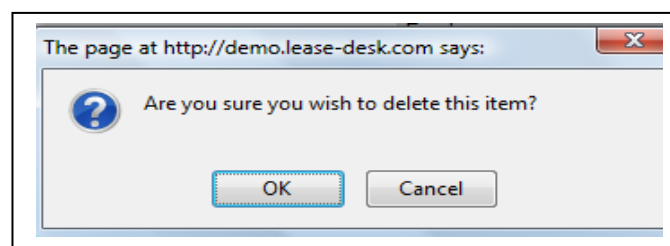
3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;

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

#### 3.1.4. Deleting an Address:

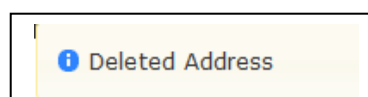
1. To delete an address from your Company Details, highlight the required address (as indicated previously) and click ✖ Delete Address

2. You will then receive the following message;



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

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

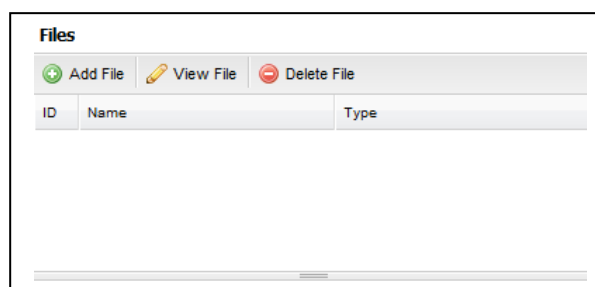


## 3.2. Adding, Viewing, and Deleting Files:

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

### 3.2.1. Adding a File:

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



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

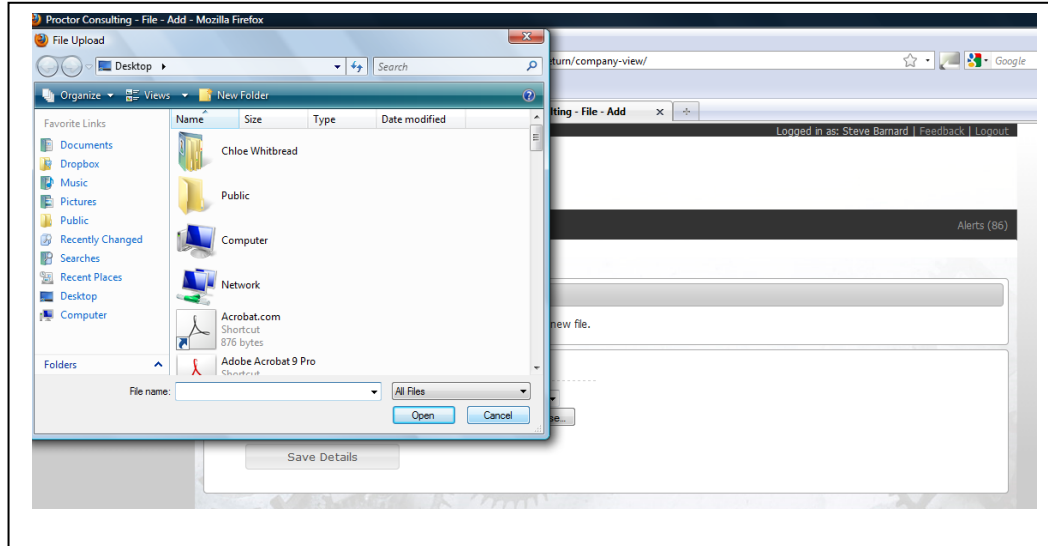


3. You will then be presented with the 'Add a New File' screen as indicated below;

A screenshot of the 'Add a New File' screen in the LEASE-DESK.COM application. The page has a dark header with the LEASE-DESK.COM logo and navigation links: Home, Agreements, Search, Dashboard, and Alerts (86). Below the header is a 'back' button. The main content area is titled 'Add a New File' and contains the instruction: 'Select Type from the drop down menu and browse to locate and add a new file.' There is a form with a 'Type' label, a dropdown menu showing 'Please Select', and a 'Browse...' button. Below the form is a 'Save Details' button.

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

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



Save Details

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

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

Uploaded file

### 3.2.2. Viewing a File:

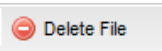
1. To view an existing file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

2. Click 

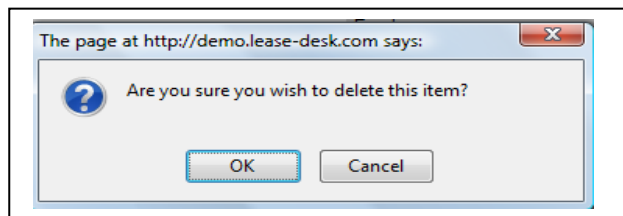
### 3.2.3. Deleting a File:

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).

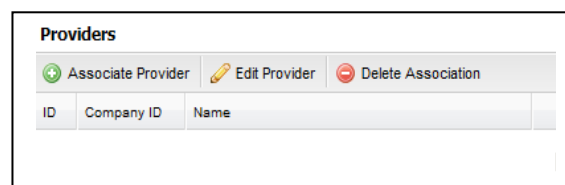
5. You are then taken back to the Edit Company Details screen where you will receive the following confirmation message;

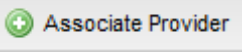


## 3.3. Providers: Associating and Deleting Association:

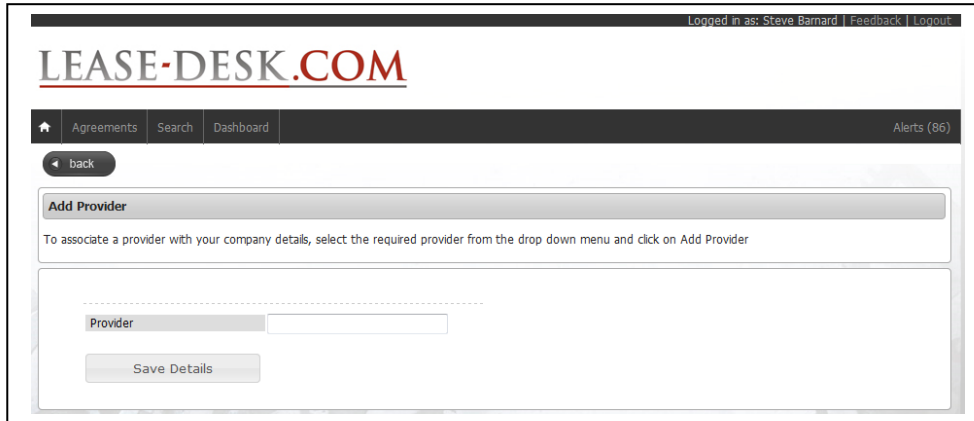
### 3.3.1. Associating a Provider (Vendor Only):

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

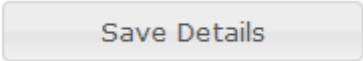


2. Click 

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



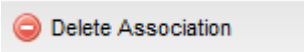
4. Select a Provider from the drop down menu and click



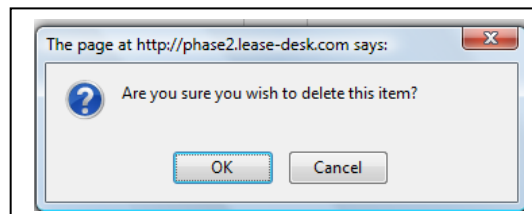
5. You will then be taken back to your homepage.

### 3.3.2. Deleting a Provider Association (Vendor Only):

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

2. Click 

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

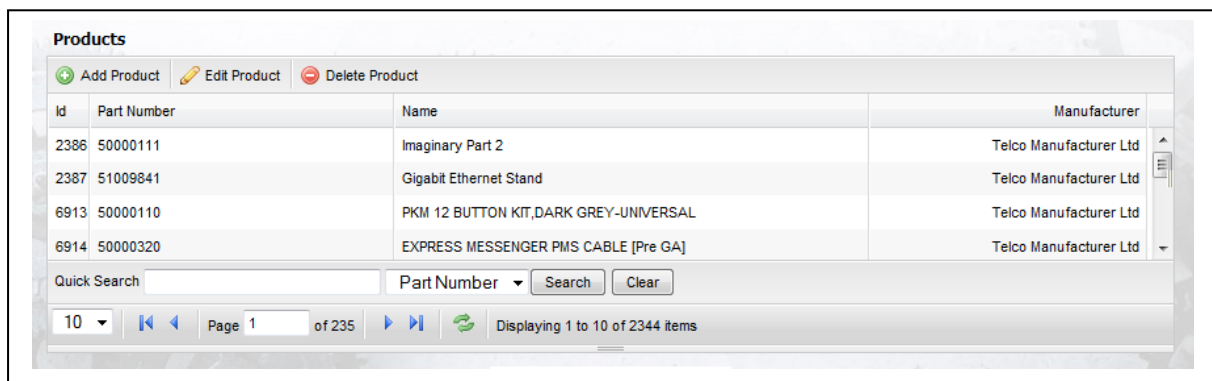


4. You will then be taken back to your home screen.

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

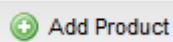
#### 3.4.1 Adding a Product:

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

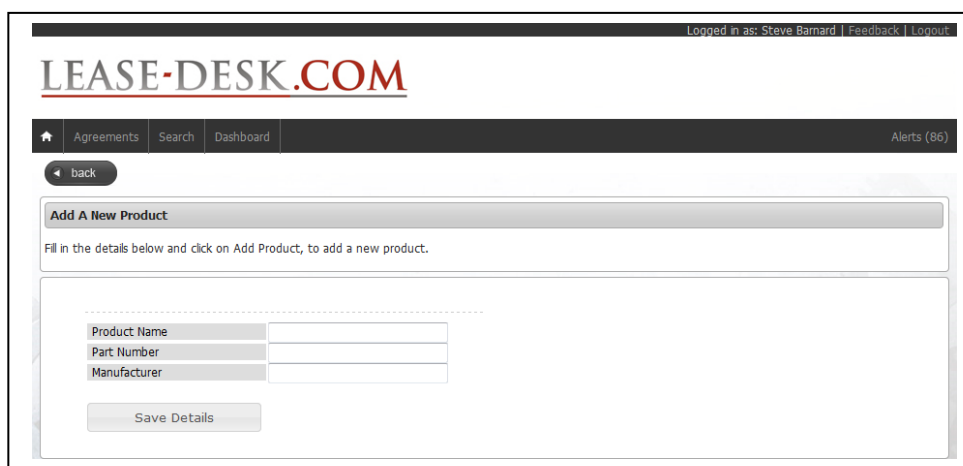


Id	Part Number	Name	Manufacturer
2386	50000111	Imaginary Part 2	Telco Manufacturer Ltd
2387	51009841	Gigabit Ethernet Stand	Telco Manufacturer Ltd
6913	50000110	PKM 12 BUTTON KIT,DARK GREY-UNIVERSAL	Telco Manufacturer Ltd
6914	50000320	EXPRESS MESSENGER PMS CABLE [Pre GA]	Telco Manufacturer Ltd

2. Click



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



Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (86)

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Add A New Product

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

Product Name

Part Number

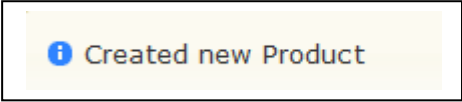
Manufacturer

Save Details

4. Fill in the details and click

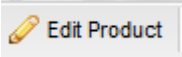
Save Details

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

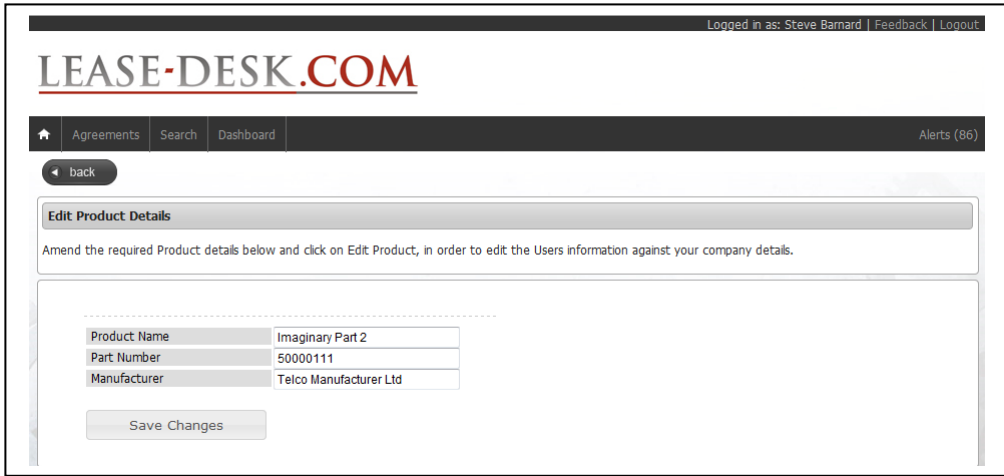
A yellow rectangular box with a blue information icon on the left and the text "Created new Product" in blue.

### 3.4.2 Editing a Product:

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

2. Click The button is grey with a yellow pencil icon and the text "Edit Product" in blue.

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

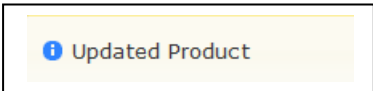
A screenshot of the "Edit Product Details" screen. At the top, it says "Logged in as: Steve Barnard | Feedback | Logout". Below the "LEASE-DESK.COM" logo is a navigation bar with "Agreements", "Search", and "Dashboard". A "back" button is on the left, and "Alerts (86)" is on the right. The main heading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

Product Name	Imaginary Part 2
Part Number	50000111
Manufacturer	Telco Manufacturer Ltd

A grey button with the text "Save Changes" in blue.

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;

A yellow rectangular box with a blue information icon on the left and the text "Updated Product" in blue.

### 3.4.3 Deleting a Product:



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

2. Click 

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

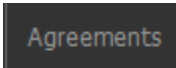
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;



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

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

### 4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select 

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

Logged in as: Steve Barnard | Feedback | Logout

## LEASE-DESK.COM

Agreements Search Dashboard Alerts (66)

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### Agreement List

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


View Agreement View Log Summarise Notes

ID	Identifier	Company	Status	Primary User	RBO Level	End Date
384	756-0384	A-Z Taxi's Ltd	Dead	Janine Hollier	84343.71	10/03/2010
1039		A-Z Taxi's Ltd	Prospect	Ian Somerholder	0.00	
311	1024	ABC University	Prospect	John Ross	0.00	
874	IMTE018	ABC University	Live	Neal Hutchinson	6801.12	01/02/2013
398	756-0398	Beacon Insurance Ltd	Live	Bob Sinclair	13537.85	31/10/2010
157	000/011	Beacon Insurance Ltd	Prospect	Bob Sinclair	0.00	
895	IMTE039	Beta Healthcare Ltd	Prospect	Hannah Martin	0.00	
950	IMTE094	Brent Design Ltd	Prospect	Robert Rogers	0.00	

Quick Search Company Search Clear

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

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

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

### Customer Information:

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

### Companies Information:

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

### Contract Terms:

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

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

### End of Term:

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

### Financial Product Information:

This details the Financial Product information

### Upgrade Options:

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

### Product Information:

This lists the Product (s) within the agreement.

The screenshot displays the Lease-Desk system interface with several tabs and data sections:

- Customer Information:** Internal Agreement Id: 157, Customer: Beacon Insurance Ltd, User: Bob Sindlar, Equipment Location, Credit Limit: 1,000.00, Credit Rating: 32, Analysis Date: 07/02/2008.
- Provider Information:** Provider: Siemens Financial Services Ltd, User: Martine Williams, Contract: Fixed Period Rental Agreement.
- Contract Terms:** Agreement Identifier: 000/011, Payment Type: Advance, Rate: Interest Rate, Interest Rate: 10.00%, Rate Per 1000: 20.74, Profile: Initial Payment: 3, Profile: Regular Payment: 57, Payment Frequency: Monthly, Initial Payment: 18,646.71, Regular Payment: 6,215.57, First Payment Date, Status: Prospect, Prospect: Quote, Expected Close Date: 31/07/2010, Acceptance Expiry Date.
- End of Term:** Secondary Rental: 0.00, Residual Value: 0.00.
- Upgrade Options:** RBO Level: 0.00, Periods Left: 58, Settlement: 0.00, Last Payment, Last Notice, Capital Amount: 299,690.01.
- Vendors:** Call User, Email User, Follow Up. Table with columns: ID, Name, Primary Contact, Telephone. Data row: 182, Bright Tel Ltd, Neil Pollock, 01804 596569.
- Files:** Add File, View File, Delete File. Table with columns: ID, Name, Type.
- Notes:** Add Note, Edit Note, Delete Note, View Note, Summarise. Table with columns: ID, Type, Name, Note, Date.
- Products:** Add Product, Edit Product, Delete Product(s), Print Products, Download CSV. Table with columns: ID, Vendor, Part Number, Name, Manufacturer, Price, Quantity, Value. Data row: 817, Bright Tel Ltd, 50000111, Imaginary Part 2, Teloo Manufacturer Ltd, 299.99, 999, 299,690.01.
- Audit Log:** Table with columns: Name, Date, Action. Data row: Steve Barnard, 04/11/2010 10:42:47, Viewed the agreement from an edit page.

#### 4.1.1 Calling or Emailing a Primary Contact:

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



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

 The screenshot shows the 'LEASE-DESK.COM' interface. At the top is a navigation bar with 'Agreements', 'Search', and 'Dashboard'. Below this is a 'back' button. The main heading is 'Add Call Note'. A sub-header says 'Add a note by adding details to the message box and clicking on Save.' Below this is a form with the following fields:
 

Agreement ID	157
Customer Name	Beacon Insurance Ltd
User Name	Bob Sindlar
Company Name	Beacon Insurance Ltd
Telephone Number	01252 456 782
Message	

Save Details

3. Complete the details and click
4. The detail will then be saved as a standard note, visible within the agreement.
5. If you have selected the 'Email User' option, you will then be presented with the following screen;




 The screenshot shows the 'LEASE-DESK.COM' interface. At the top is a navigation bar with 'Agreements', 'Search', and 'Dashboard'. On the right of the bar is 'Alerts (86)'. Below this is a 'back' button. The main heading is 'Add Email Note'. A sub-header says 'Add a note by adding details to the message box and clicking on Save.' Below this is a form with the following fields:
 

Company Name	Bell Finance PLC
User Name	Rosie Phipps
Email	rosie.phipps@lease-desk.com
Populate	Blank ▼
Message	

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

#### 4.1.2 Creating Follow Ups:

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

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

2. Click on



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

Logged in as: Steve Barnard | Feedback | Logout

## LEASE-DESK.COM

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)
Alerts (88)

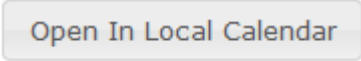
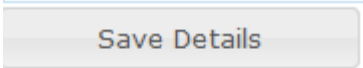
[back](#)

**Add Calendar Note**

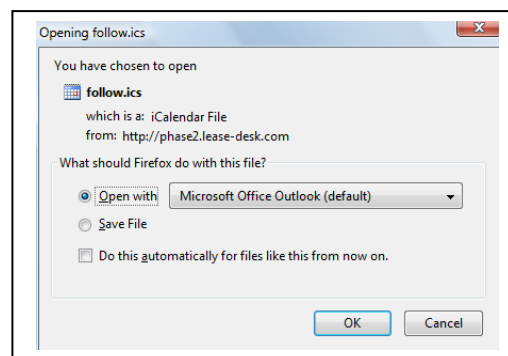
Add a note by adding details to the message box and clicking on Save.

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

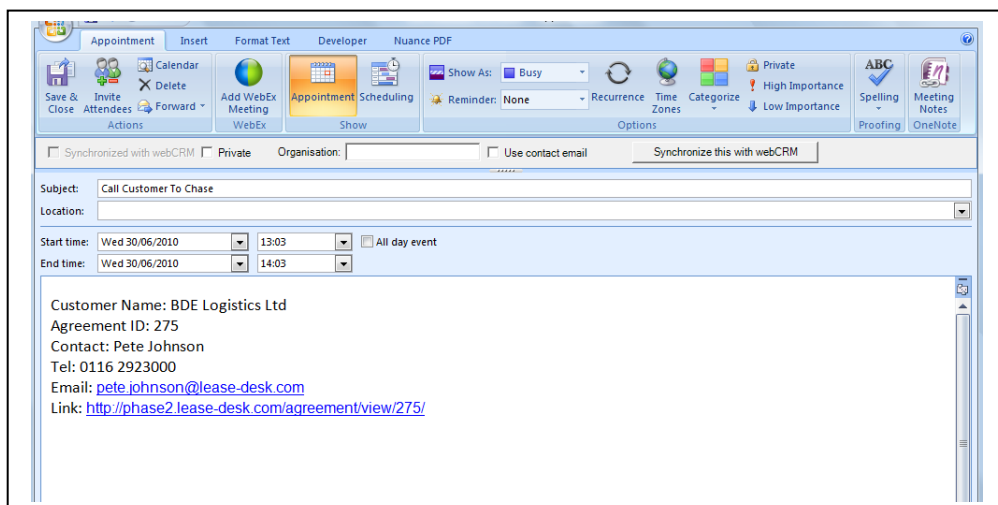
4. Enter a 'Subject' line and then click in the 'Date' box to bring up a calendar.
5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

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

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



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



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

#### 4.1.3 Adding, Viewing and Deleting a File:

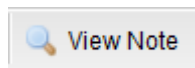
- To Add, View or Delete a File, follow chapter **3.2. Adding, Viewing and Deleting Files**

#### 4.1.4 Viewing a Note:

- Within the main 'View Agreement' screen, go to the Notes table as indicated below;

Notes				
<a href="#">+ Add Note</a> <a href="#">✎ Edit Note</a> <a href="#">- Delete Note</a> <a href="#">🔍 View Note</a> <a href="#">📄 Summarise</a>				
ID	Type	Name	Note	Date
110	Internal	Steve Barnard	Chloe testing notes	22/03/2010 11:14:51
109	External	Steve Barnard	sdsdsdsdsdsd	22/03/2010 11:12:49

- Click



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

Logged in as: Steve Barnard | Feedback | Logout

# LEASE-DESK.COM

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)
Alerts (270)

[back](#)

## View Note

Full note details are detailed below.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
Username	Steve Barnard
Type	External
Message	Call customer tomorrow with update.

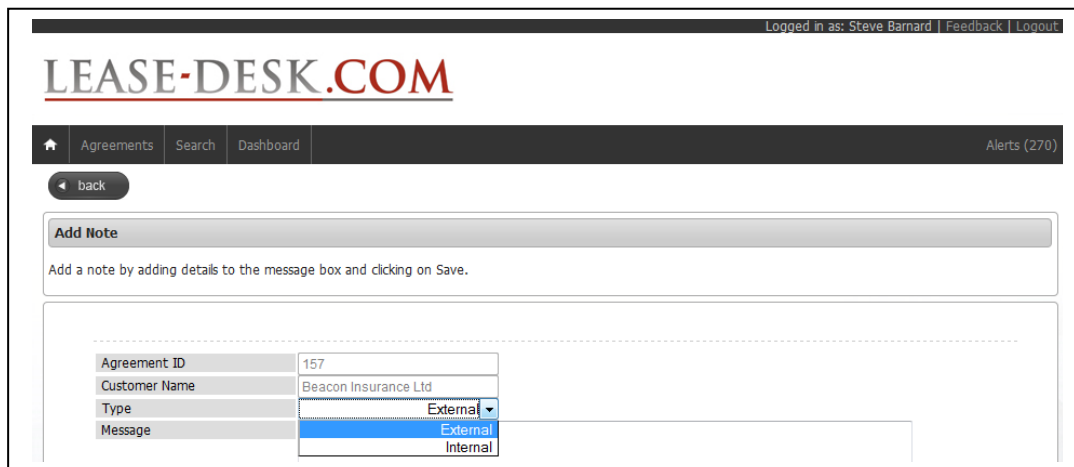
#### 4.1.5 Adding a Note:

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

2. Click



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

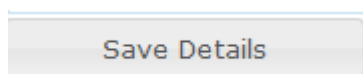
The screenshot shows the 'Add Note' screen in the LEASE-DESK.COM application. At the top, it says 'Logged in as: Steve Barnard | Feedback | Logout'. Below the logo, there's a navigation bar with 'Agreements', 'Search', and 'Dashboard', and an 'Alerts (270)' indicator. A 'back' button is visible. The main heading is 'Add Note', followed by the instruction: 'Add a note by adding details to the message box and clicking on Save.' Below this, there's a form with the following fields: 'Agreement ID' (157), 'Customer Name' (Beacon Insurance Ltd), 'Type' (a dropdown menu with 'External' selected), and 'Message' (a text area). The 'Type' dropdown is open, showing 'External' and 'Internal' options.

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

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

4. Type your message into the blank box

5. Click

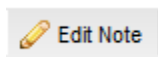


5. You will then be taken back to the main 'View Agreement' screen.

#### 4.1.6 Editing a Note

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

2. Highlight the required note and click





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

The screenshot shows the 'Edit Note Details' screen. At the top, there is a navigation bar with 'Agreements', 'Search', and 'Dashboard' links, and an 'Alerts (271)' indicator. Below the navigation bar is a 'back' button. The main content area has a title 'Edit Note Details' and a subtitle 'Amend a current note by editing details within the message box and clicking on Save.' Below this is a form with the following fields:

Agreement ID	311
Customer Name	ABC University
Username	Steve Barnard
Type	External
Message	Called customer with update.

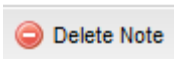
Save Changes

4. Amend the note as required and then click

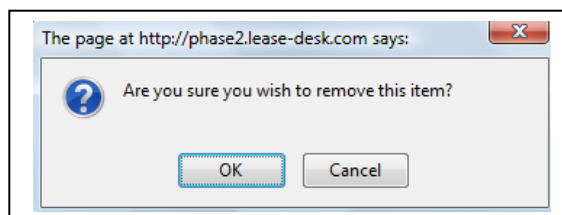
#### 4.1.7 Deleting a Note:

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

2. Highlight the required note and click on



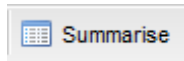
3. You will then be presented with the following confirmation message;



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

#### 4.1.8 Summarising Notes:

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



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

A screenshot of the 'View Summarised Notes' screen in the Lease-Desk system. The header shows 'LEASE-DESK.COM' and 'Logged in as: Steve Barnard | Feedback | Logout'. The navigation bar includes 'Agreements', 'Search', 'Dashboard', and 'Alerts (87)'. A 'back' button and 'Printable version' link are present. The main content area is titled 'View Summarised Notes' and contains a table with columns: ID, Type, Name, Recipient, Note, and Date.

ID	Type	Name	Recipient	Note	Date
107	Internal	Steve Barnard		<p>Many thanks, Jen</p> <p>From: Chloe Whitbread [mailto:chloe@proctorconsulting.co.uk]            Sent: 15 March 2010 14:54            To: Platt, Jenni            Subject: RE: Login's</p> <p>The users set up so far need to see the details but when we set up additional channel partner users they shouldn't be able to view anything. Is there a way of greying out the time slots so that users can see that there is a meeting but can't see the details?</p>	17/03/2010 15:44:41

## 4.2. Viewing an Audit Log:

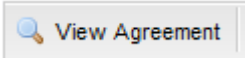
1. There are two ways in which to view the Audit Log against an agreement;

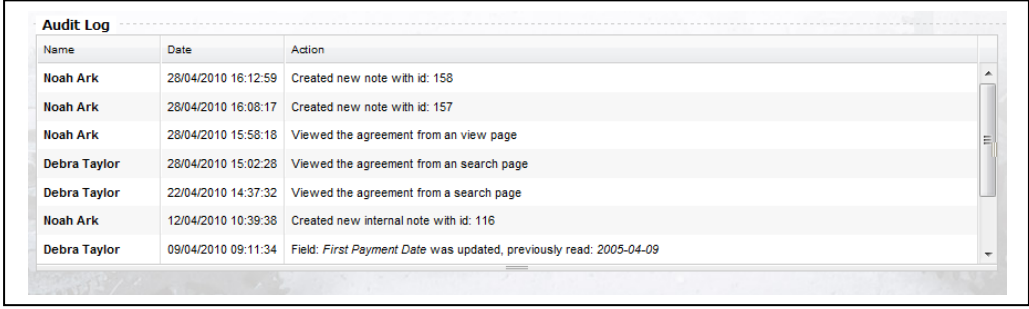
A) Either highlight the required Agreement from the main Agreement Lists screen as indicated previously and then click to receive the following screen;

A screenshot of the 'View Audit Log' screen in the Lease-Desk system. The header shows 'LEASE-DESK.COM' and 'Logged in as: Steve Barnard | Feedback | Logout'. The navigation bar includes 'Agreements', 'Search', 'Dashboard', and 'Alerts (8)'. A 'back' button and 'Printable version' link are present. The main content area is titled 'View Audit Log' and contains a table with columns: Name, Date, and Action.

Name	Date	Action
Steve Barnard	09/09/2010 09:27:08	Created new note with id: 371
Steve Barnard	09/09/2010 09:22:04	Viewed the agreement from an view page
Debra Taylor	06/09/2010 09:23:31	Viewed the agreement from an search page
Chloe Whitbread	25/08/2010 13:33:01	Viewed the agreement from an search page
Chloe Whitbread	29/07/2010 09:24:14	Viewed the agreement from an search page
Chloe Whitbread	09/07/2010 10:27:53	Viewed the agreement from an search page
Debra Taylor	06/07/2010 09:16:55	Viewed the agreement from an search page
Debra Taylor	01/07/2010 08:55:37	Viewed the agreement from an search page
Debra Taylor	28/06/2010 10:37:09	Viewed the agreement from an edit page
Debra Taylor	28/06/2010 10:37:05	Created agreement: 1039 Created product with id: 9691 Vendor: Shawn Dawson (Bright Tel Ltd). Product: EXPRESS MESSENGER PLUS CABLE (Pre GA) 1 12231 00

or

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

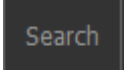


Name	Date	Action
Noah Ark	28/04/2010 16:12:59	Created new note with id: 158
Noah Ark	28/04/2010 16:08:17	Created new note with id: 157
Noah Ark	28/04/2010 15:58:18	Viewed the agreement from an view page
Debra Taylor	28/04/2010 15:02:28	Viewed the agreement from a search page
Debra Taylor	22/04/2010 14:37:32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

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

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

## 5.0 Search:

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

**LEASE-DESK.COM**

Logged in as: Mark Ark | New York | Logout

Agreements Search Dashboard Alerts (51)

back

**Search Agreements**

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

**Search Mode**

Type: Standard Search

**Customer**

Name:

Agreement Status: All

Prospect Status: All

Search:

Date Range: From: Dec 2010 To: Dec 2010

**Customer**

Customer:

**Vendor**

Vendor:

**Primary Contact**

Contact:

**Group**

Group:

**Product**

Product:

**Agreement**

Months Left: All

RBO Level: All

**Customer Detail**

Sic Code:

**Post Code**

Post:

**Turnover**

Credit Limit: All

Credit Rating: All

Employees: All

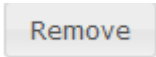
**Output Type**

Report: Default

**Filter**

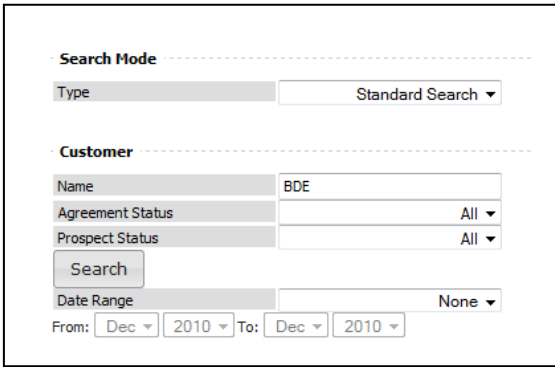
- The Search Agreements screen, allows you to search for all agreement information, that you have access to (determined by role type), by using the different filters.
- To bring up the information in any of the tables, click

5. To remove any data selected, click



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

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

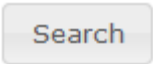


The screenshot shows the 'Search Agreements' interface. It has a 'Search Mode' section with a 'Type' dropdown set to 'Standard Search'. Below is the 'Customer' section with fields for 'Name' (containing 'BDE'), 'Agreement Status' (dropdown set to 'All'), and 'Prospect Status' (dropdown set to 'All'). There is a 'Search' button. At the bottom, there is a 'Date Range' section with 'From' and 'To' dropdowns, both set to 'Dec' and '2010', and a 'None' dropdown.

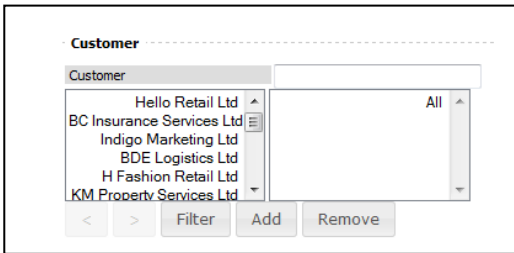
2. Complete the following details if required/known or keep as All;

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

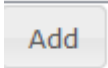
3. Click



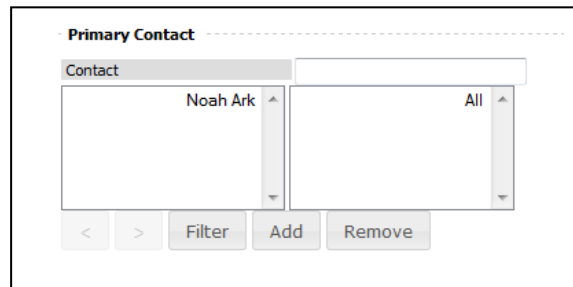
4. The company agreement information relating to the inputted information will then be displayed in each of the filter tables, as indicated in the example below;



The screenshot shows a 'Customer' filter table. It has a table with two columns: 'Customer' and 'All'. The 'Customer' column lists several companies: Hello Retail Ltd, BC Insurance Services Ltd, Indigo Marketing Ltd, BDE Logistics Ltd, H Fashion Retail Ltd, and KM Property Services Ltd. The 'All' column has a dropdown set to 'All'. Below the table are buttons for '<', '>', 'Filter', 'Add', and 'Remove'.

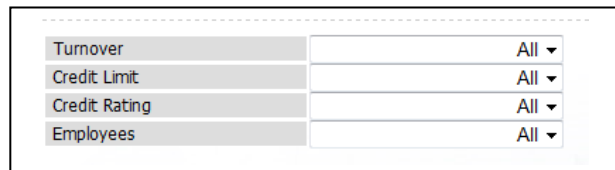
To include any of the produced data, within each table, in your search, highlight the required data, i.e. Primary Contact, and then click 

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

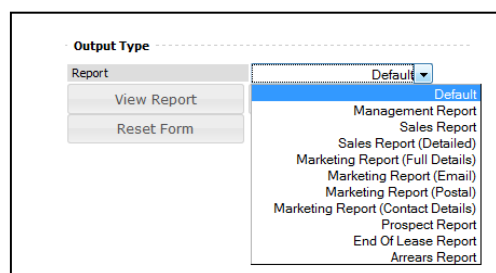


7. Carry on with each table required, following the previous step.

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



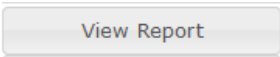
9. Go to the 'Output Type', and select a report type from the drop down menu.



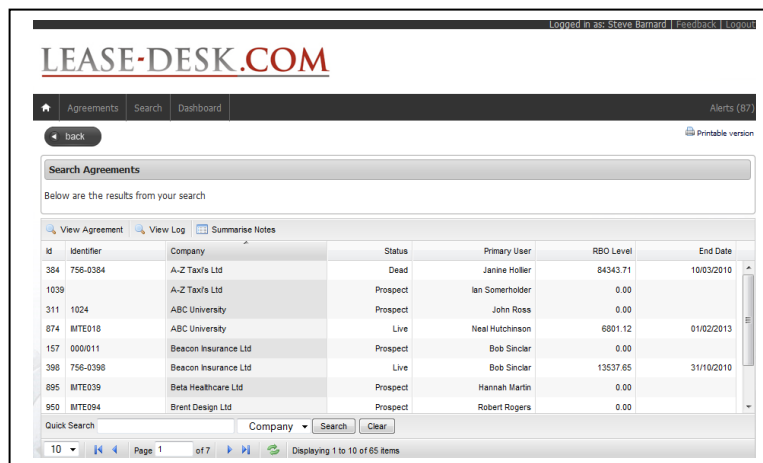
**Note: There are eleven different report types available, all of which provide different detailed information. These are broken down below;**

1. **Default:** ID, Identifier, Company, Status, Primary User, RBO Level, End Date
2. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.
3. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.
4. **Sales Report (Detailed):** ID, Agreement Status, Customer Name, Equipment location, Provider Name, External ID, Term, Regular Payment, RBO Level, Settlement Figure, Months Remaining & Capital Amount.
5. **Marketing Report (Full Details):** With all details listed below.
6. **Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.
7. **Marketing Report (Postal):** As above, minus email but with full address details.
8. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the 'Output Type', and select a report type from the drop down menu.
9. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.
10. **End of Lease Report:** ID, Customer Name, Term Type, Put Option, Put Option Cost, Secondary Rental, Secondary Rental Split, Notice Period, Last Payment Date.
11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

10. Once the report type has been selected, click on

A rectangular button with a light gray border and a light gray background. The text "View Report" is centered in a blue, sans-serif font.

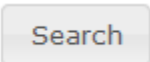
and you will be presented with the data in the below format;



or  to view in CSV format as per below;

ID	Identifier	Customer Status	Primary User	RBO Level	Last Payment Date
1	1002/968	DD Financ Live	Hilda Ogd	125625.6	01/10/2010
2	6 1.19E+08	Alpha Mei Live	Mark Gills	11419.92	24/05/2010
3	8 0000/123	AT Manuf Secondary	Reece Asf	140000	26/02/2010
4	10 000/456	H Fashion Live	Mike Osbi	12932.6	31/12/2011
5	11 000/789	H Fashion Prospect	Sharon Wi	0	
6	12 000/101	H Fashion Live	Sharon Wi	17919.72	05/11/2010
7	13 000/102	H Fashion Live	Sharon Wi	22622.25	26/06/2010
8	58 1.4E+09	DD Financ Live	Hilda Ogd	8684.83	18/01/2012
9	63 1.4E+09	Alpha Mei Dead	Mark Gills	14342.32	09/11/2011
10	65 1.4E+09	AT Manuf Dead	Reece Asf	183907.7	14/02/2009
11	67 1.4E+09	H Fashion Dead	Mike Osbi	37339.52	14/10/2009
12	68 1.4E+09	H Fashion Dead	Sharon Wi	134419.3	03/10/2009
13	70 1.4E+09	H Fashion Live	Sharon Wi	5565.55	09/04/2012
14	75 TEST1023	OK Manuf Prospect	Emma Pet	0	
15	76 TEST1024	KM Prope Prospect	Tony Mad	0	
16	77 TEST1025	Beta Heall Prospect	Hannah M	0	

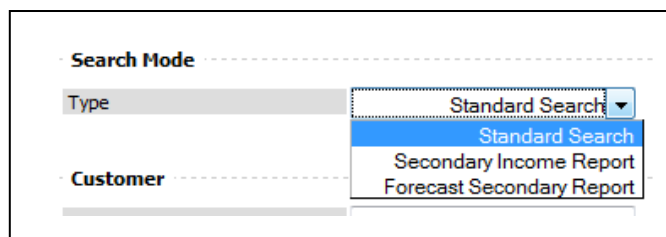
## 5.2. Searching for all Customer Agreement Information:

1. From the main 'Search Agreements' screen as indicated previously, leave the Customer name, field blank and Status and Prospect Status set to 'All'
2. Click 
3. As indicated in previous steps, select any of the information using filters or leave as 'All'.
4. Follow the previous step 9 on how to select report type and view data.



### 5.3. Changing the Search Mode:

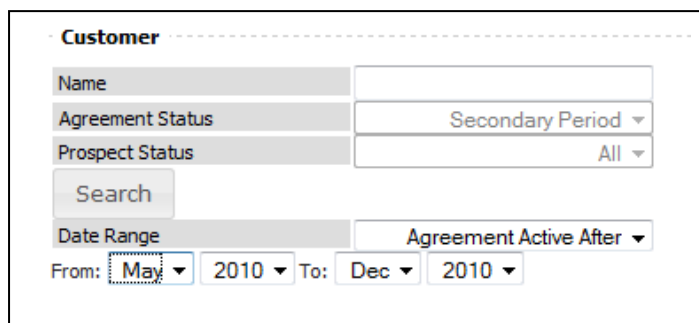
1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;



The screenshot shows a 'Search Mode' section with a 'Type' dropdown menu. The dropdown is open, showing three options: 'Standard Search' (selected), 'Secondary Income Report', and 'Forecast Secondary Report'. Below the dropdown is a 'Customer' label and an empty text input field.

#### 5.3.1 Secondary Income Report

1. If you select this report, it will automatically set the agreement status to 'secondary period' and Prospect Status to 'All'.
2. Next, select the date range that you wish to search for, as indicated below.



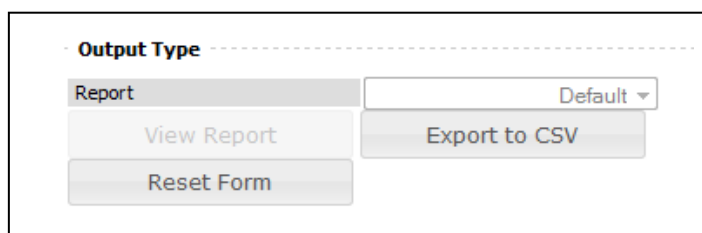
The screenshot shows a 'Customer' search form. It includes fields for 'Name', 'Agreement Status' (set to 'Secondary Period'), and 'Prospect Status' (set to 'All'). There is a 'Search' button. Below these is a 'Date Range' section with 'From' and 'To' date pickers. The 'From' date is set to 'May 2010' and the 'To' date is set to 'Dec 2010'. There is also an 'Agreement Active After' dropdown menu.

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

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

[Export to CSV](#)

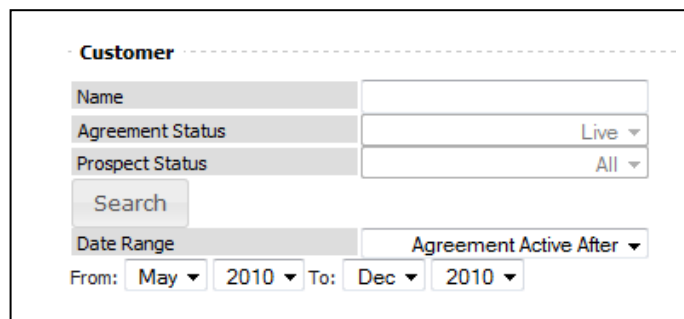
as indicated below;



The screenshot shows an 'Output Type' section. It includes a 'Report' dropdown menu set to 'Default'. Below the dropdown are three buttons: 'View Report', 'Export to CSV', and 'Reset Form'.

### 5.3.2 Forecast Secondary Report

1. If you select this report, it will automatically set the agreement status to 'Live' and Prospect Status to 'All'.



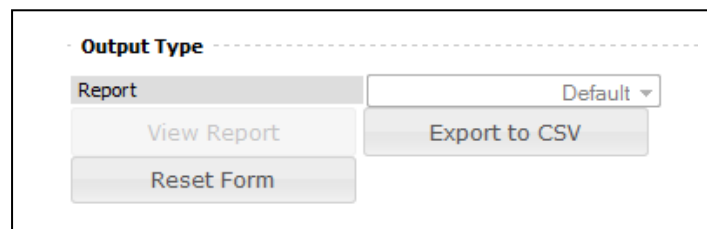
The screenshot shows a form titled "Customer" with a dashed line separator. It contains the following fields and controls:

- Name:** A text input field.
- Agreement Status:** A dropdown menu with "Live" selected.
- Prospect Status:** A dropdown menu with "All" selected.
- Search:** A button.
- Date Range:** A section with "From:" and "To:" labels, each followed by month and year dropdowns. The "From:" dropdown shows "May" and "2010", and the "To:" dropdown shows "Dec" and "2010".
- Agreement Active After:** A dropdown menu.

2. Next, select the date range that you wish to search for, as indicated below.
3. Continue to select the relevant criteria required before selecting your report type from the dropdown list.
4. Note: This report type is only viewable via CSV format. To view the data, click on

**Export to CSV**

as indicated below;



The screenshot shows a form titled "Output Type" with a dashed line separator. It contains the following fields and controls:

- Report:** A dropdown menu with "Default" selected.
- View Report:** A button.
- Export to CSV:** A button.
- Reset Form:** A button.

## 6. Dashboard:

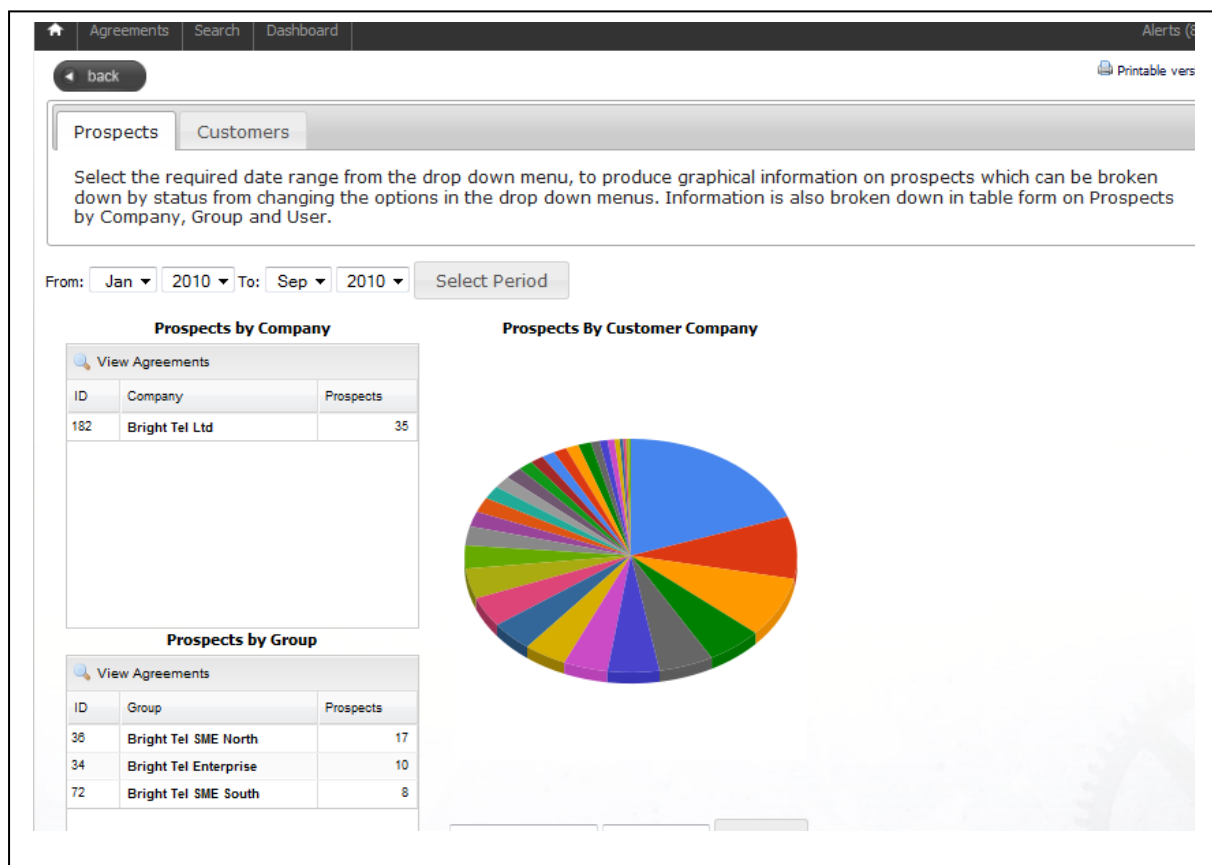
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

## 6.1. Prospects:

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

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

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



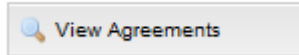
3. From the date range at the top of the page, select the required date and click

Select Period

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

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

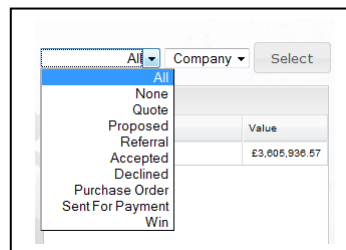
information and click



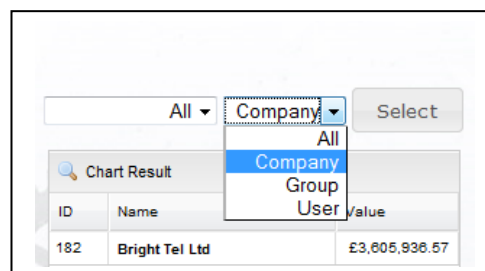
6. Alternatively, double click on the required line.

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

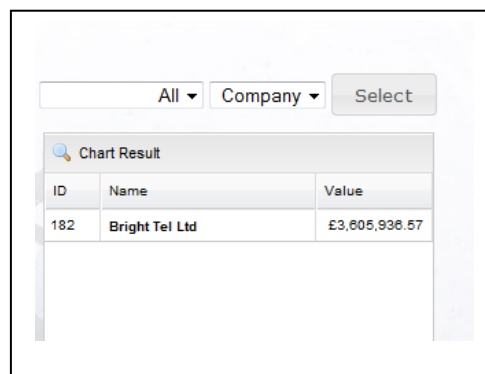
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



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

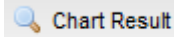


3. You will then be presented with the required information within the table below.



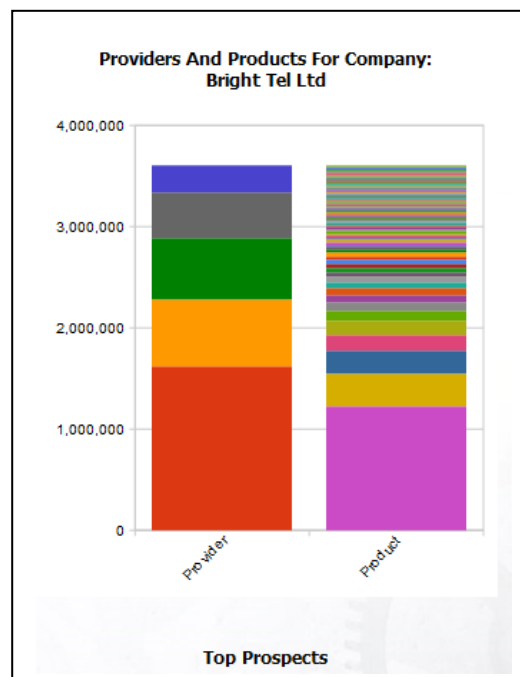
4. Highlight the individual line of information required.

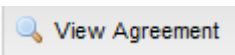
5. To view the information in graphical format, click



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

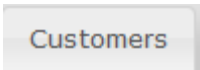
7. To see the legend, hover over the diagram with your mouse.



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

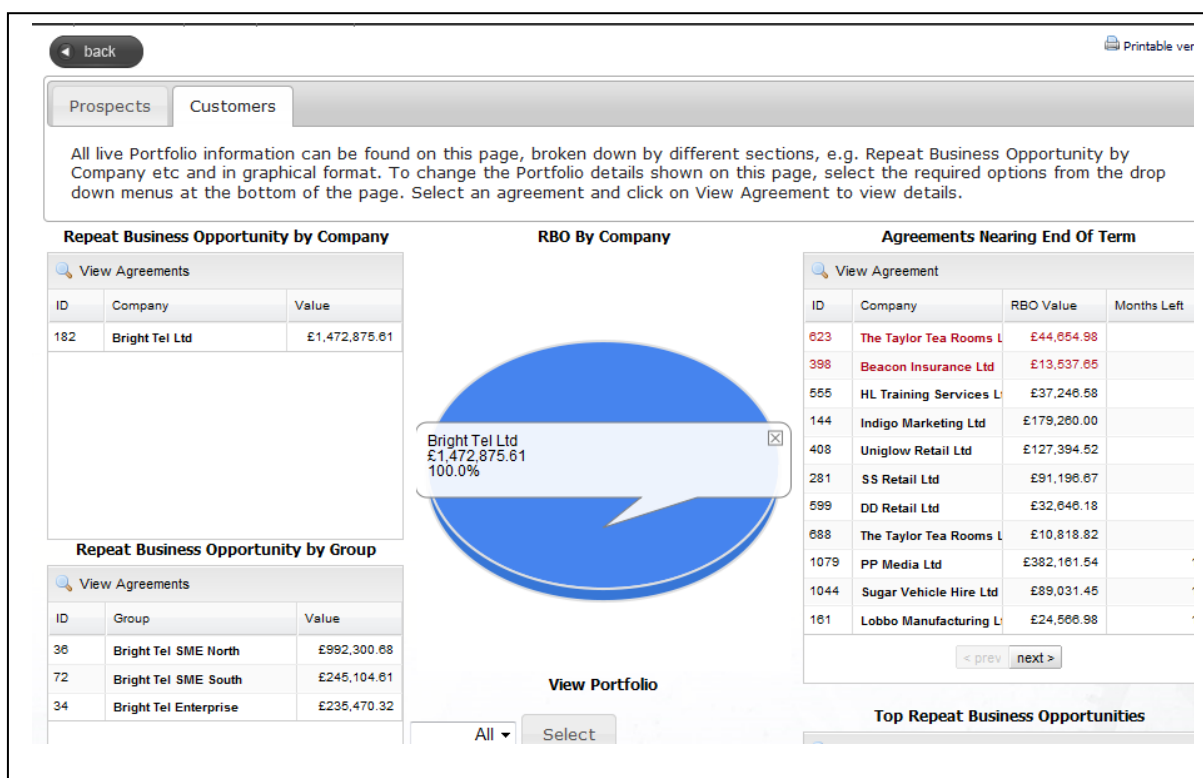
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.


## 6.2. Customers:

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

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

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



3. To view any of the individual agreement information within any of the tables as indicated above, highlight the relevant line within the table and click 

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

The screenshot shows the LEASE-DESK.COM dashboard. At the top, there's a navigation bar with 'Agreements', 'Search', and 'Dashboard'. A 'back' button and a 'Printable version' link are also visible. The main heading is 'Repeat Business Opportunity by Company'. Below it, a message says 'Below are the results from your search'. There are three tabs: 'View Agreement', 'View Log', and 'Summarise Notes'. The 'View Agreement' tab is active, displaying a table of results.

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

At the bottom, there's a 'Quick Search' section with a text input, a 'Company' dropdown, and 'Search' and 'Clear' buttons.

5. You then have the option to View an Agreement, View Log and Summarise Notes.

Refer back to Chapter 4 for details on how to do this.

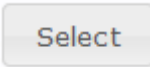
### 6.2.1 Viewing/Amending Portfolio Information:

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

The screenshot shows the 'View Portfolio' screen. It has a title 'View Portfolio'. Below the title, there's a dropdown menu set to 'All' and a 'Select' button. Below that, there's another dropdown menu set to 'Please Select' and a 'Display Graph' button. At the bottom, there's a table with the following data:

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

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

3. Click 

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

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

**View Portfolio**

All ▼ Select

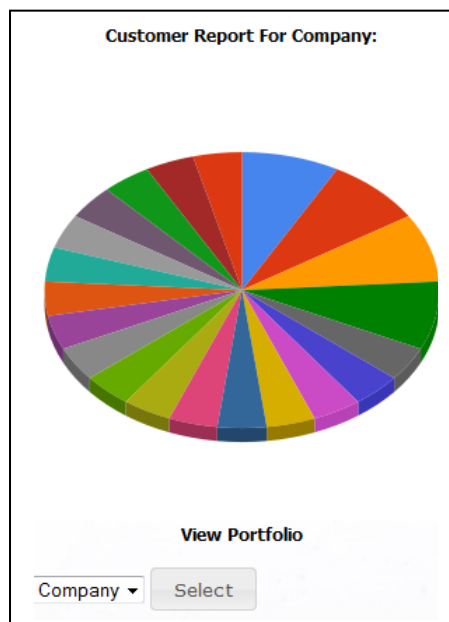
Please Select ▼ Display Graph

	Value
Ltd	£1,472,875.61

6. Highlight the required row from the table and click

Display Graph

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





## 7. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to vendor users (Normal and Main) and administration users. As main user, dependant on your defined role, you will be able to see all of the system generated alerts associated with your viewable agreements or teams agreement information.

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

The Alert Triggers are as follows;

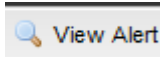
- When a new Agreement is added to the system as a Live, or Prospect contract.
- When a Prospect changes to a live customer (The vendor will be emailed a reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an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

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

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

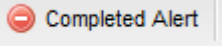
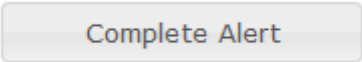
## 7.1 Viewing Alerts:

1. To view your individual or team user alerts, select **Alerts (87)** from the top menu.
2. You will then be presented with the following 'My Alerts' screen as per the following page;

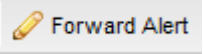
3. To view an alert, highlight the required alert and click 

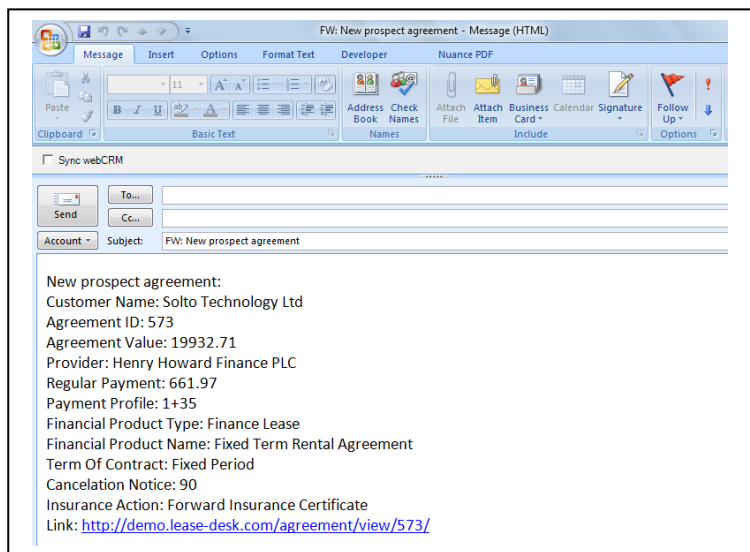
4. You will then be presented with the following screen;

## 7.2 Completing Alerts:

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

## 7.3 Forwarding Alerts:

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



## 8. General Functionality:

### 8.1. Sort:

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

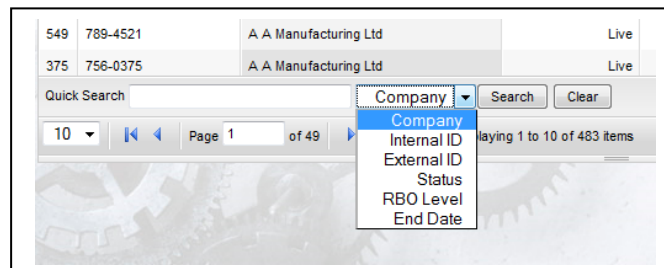
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.



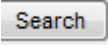
### 8.2 Quick Search:

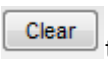
There is a 'Quick Search' functionality available within the majority of the main tables (Companies, Users, and Groups etc), allowing easy access to the required information. You will find the 'Quick Search' function at the bottom of the tables noted above.

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




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

3. Click  to search for the information





4. Click  to start from the beginning.

### 8.3 Refresh:

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

### 8.4 Scrolling through records:

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

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

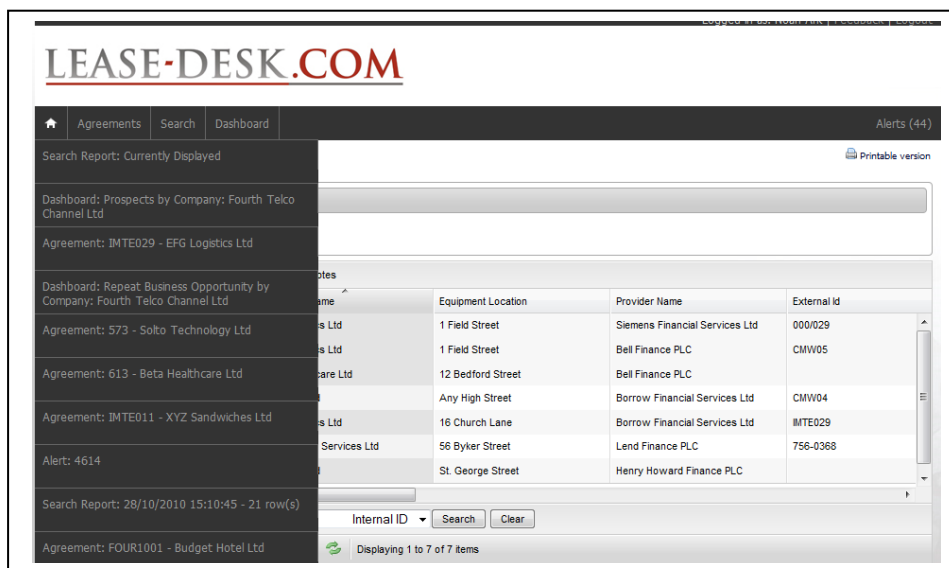
### 8.5 Changing the amount of records per view:

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



## 8.6 Last 10 Records:

1. Lease-Desk keeps a track on the last ten records that you have viewed, whether it's an agreement or a search report. The data is stored so that you can easily go back to it at any time.
2. To access your 'Last ten records viewed' list, hover with your mouse over the homepage icon as per below;

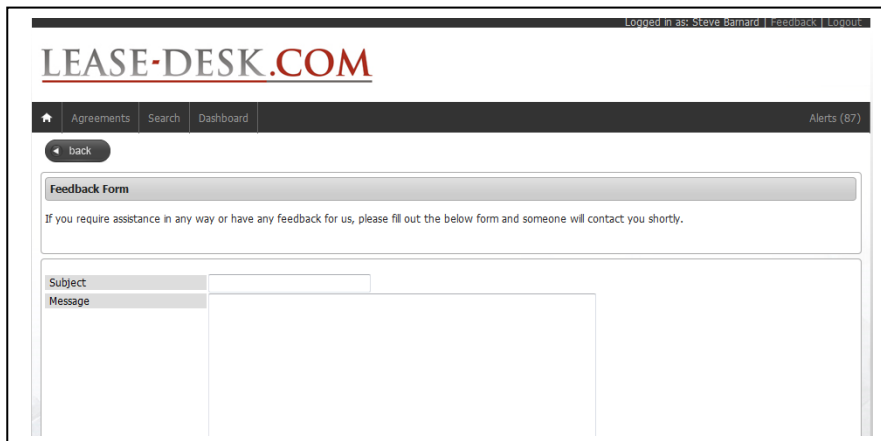


3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

## 9. Feedback:

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

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



The screenshot shows the LEASE-DESK.COM website interface. At the top, it says "Logged in as: Steve Barnard | Feedback | Logout". Below the logo, there is a navigation bar with "Agreements", "Search", and "Dashboard", and a notification "Alerts (67)". A "back" button is visible. The main content area is titled "Feedback Form" and contains the text: "If you require assistance in any way or have any feedback for us, please fill out the below form and someone will contact you shortly." Below this, there are input fields for "Subject" and "Message".

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

Send Feedback

4. Once completed, click

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

**Feedback Form: Complete**

Thank you for completing the feedback form

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

## 10. Frequently Asked Questions:

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

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

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

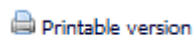
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

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

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

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

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



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



## **11. Contact Details:**

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

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

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