

LEASE-DESK

Normal Access User Manual

Version 2.0



DRIVING
SALES AND
PROFITABILITY

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1. Introduction to Lease-Desk:

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

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

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

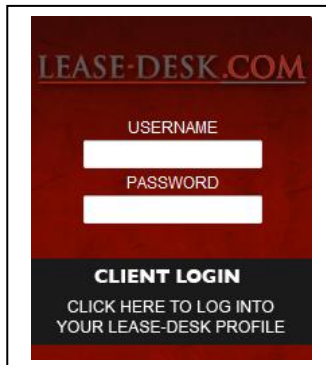
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

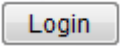
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the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

2. Logging into Lease-Desk:

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



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

3. Enter your details and click on 
4. To Log Out, select '**Logout**' from the top menu screen.

3. Home Screen: Adding, & Viewing

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

LEASE-DESK.COM Logged in as: Noah Ark
Feedback Logout

Home Agreements Search Dashboard Alerts (17)

← back

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

Company Information

Name	Fourth Teloo Channel Ltd
Company Type	Vendor
SIC Code	(6420) TELECOMMUNICATIONS
Registration Number	N/A
Turnover	250000
Employees	130
Credit Rating	67
Credit Limit	65000
Analysis Date	21/09/2009

Addresses

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

Files

Add File View File

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

Providers

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

Groups

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

Users

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

Products

ID	Part Number	Name	Manufacturer
----	-------------	------	--------------

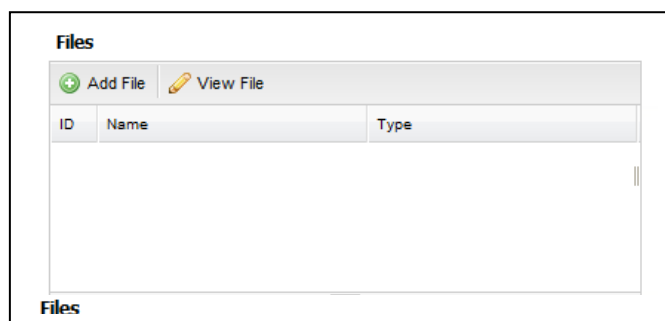
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider).

3.1. Adding and Viewing Files:

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

3.1.1. Adding a File:

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

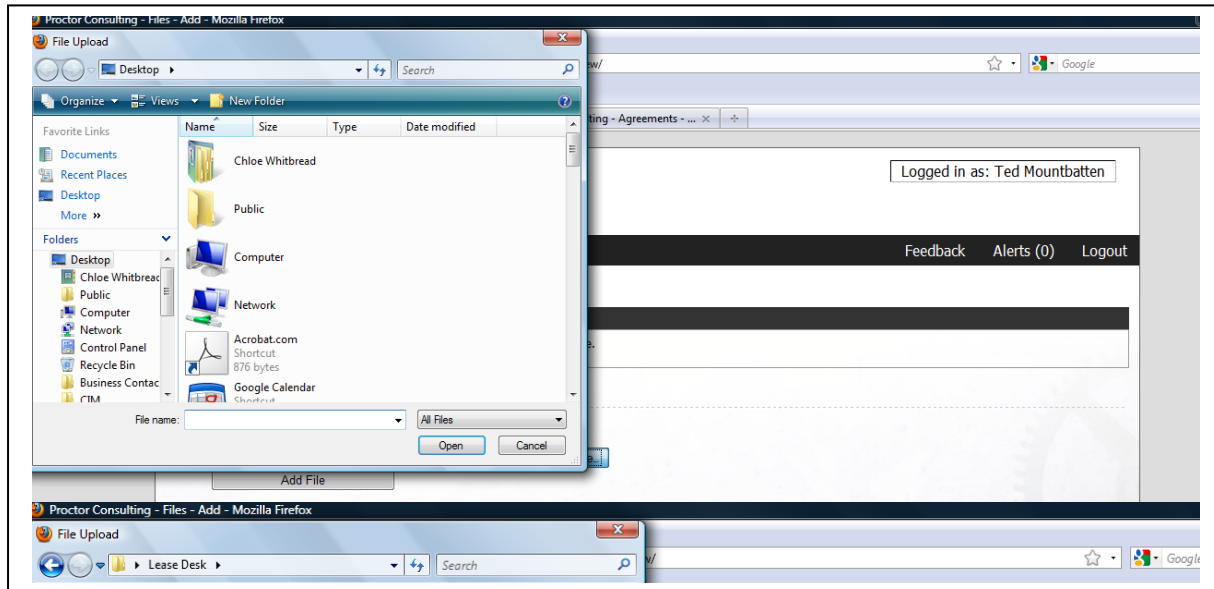


2. To add a file against your Company Details, click



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

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



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

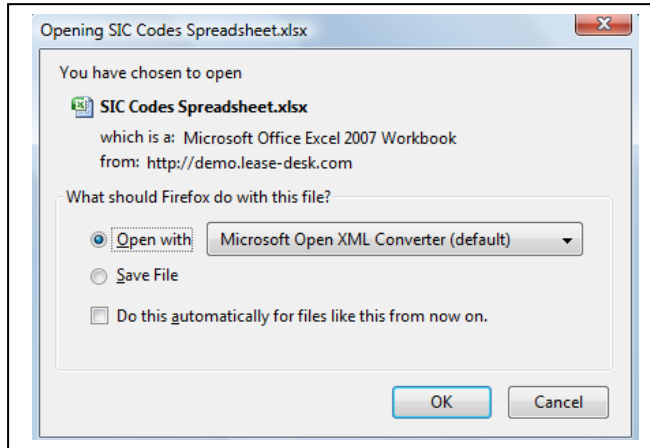
7. You will then be taken back to the 'Edit Company Details' screen and receive the following confirmation message;

3.1.2. Viewing a File:

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

2. Click

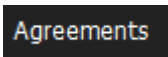
3. You will then be presented with the following pop up screen;



4. Click  to view the file.

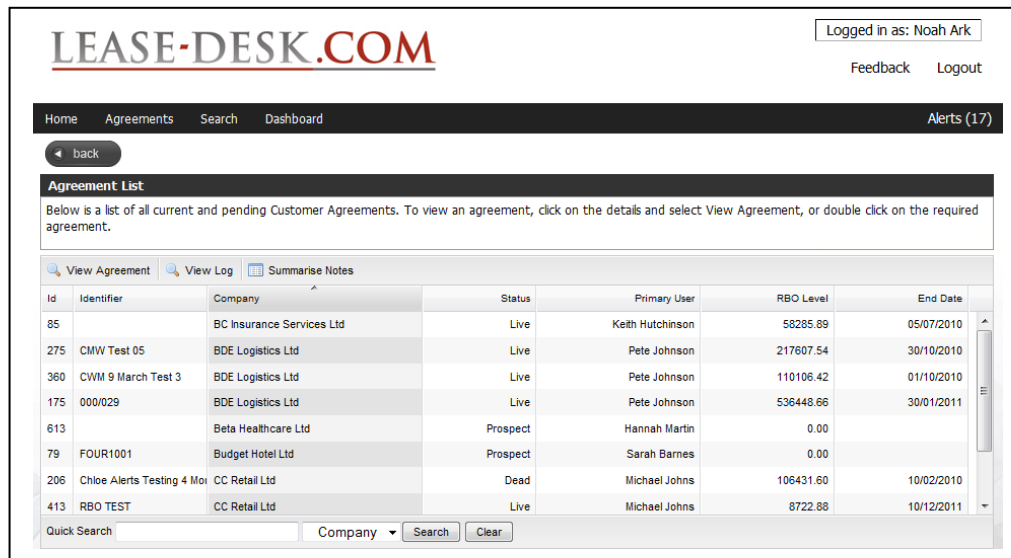
4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log

4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select 

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

This is indicated on the following page.



LEASE-DESK.COM

Logged in as: Noah Ark

Feedback Logout

Home Agreements Search Dashboard Alerts (17)

back

Agreement List

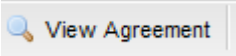
Below is a list of all current and pending Customer Agreements. To view an agreement, click on the details and select View Agreement, or double click on the required agreement.

View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
85		BC Insurance Services Ltd	Live	Keith Hutchinson	58285.89	05/07/2010
275	CMW Test 05	BDE Logistics Ltd	Live	Pete Johnson	217607.54	30/10/2010
360	CWM 9 March Test 3	BDE Logistics Ltd	Live	Pete Johnson	110106.42	01/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	536448.66	30/01/2011
613		Beta Healthcare Ltd	Prospect	Hannah Martin	0.00	
79	FOUR1001	Budget Hotel Ltd	Prospect	Sarah Barnes	0.00	
206	Chloe Alerts Testing 4 Mo	CC Retail Ltd	Dead	Michael Johns	106431.60	10/02/2010
413	RBO TEST	CC Retail Ltd	Live	Michael Johns	8722.88	10/12/2011

Quick Search Company Search Clear

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

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

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

Customer Information:

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

Contract Terms:

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

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

End of Term:

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

Companies Information:

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

Financial Product Information:

This indicates the Financial Product information

Product Information:

This indicates the Product (s) within the agreement.

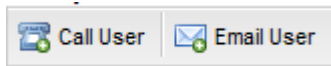
Upgrade Options:

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

The screenshot displays the 'Normal Access User Manual' interface. It features several tabs: 'Customer', 'Companies', 'Financial Product', 'Notes', 'Files', 'Products', and 'Audit Log'. The 'Customer' tab is active, showing fields for Credit Limit (500.00), Credit Rating (55), Analysis Date (05/02/2007), Internal Agreement Id (275), Agreement Identifier (CMW05), Payment Type (Arrears), Interest Rate (10.98%), Rate Per 1000 (21.73), Profile: Initial Payment (1), Profile: Regular Payment (59), Payment Frequency (Monthly), Initial Payment (5,432.50), Regular Payment (5,432.50), First Payment Date (30/11/2005), Status (Live), Prospect (None), Expected Close Date, Upgrade Options (RBO Level: 222,972.64, Periods Left: 5, Settlement: 27,027.36, Last Payment: 30/10/2010), End of Term (Secondary Rental: 5,432.50, Residual Value: 0.00), and Products (JC Power Converter (NA) from Telco Manufacturer Ltd). The 'Companies' tab shows a list of companies: BDE Logistics Ltd (Pete Johnson, Customer), Bell Finance PLC (Rosie Phipps, Provider), and Fourth Telco Channel Ltd (Noah Ark, Vendor). The 'Financial Product' tab shows a table with columns for Name, Notice, and Type, with one entry: Minimum Period Rental Agreement (90, Finance Lease). The 'Notes' tab shows a table with columns for ID, Type, Name, Note, and Date. The 'Files' tab shows a table with columns for ID, Name, and Type. The 'Products' tab shows a table with columns for ID, Vendor, Part Number, Name, Manufacturer, Price, Quantity, and Total, with one entry: 1165, Fourth Telco Channel Ltd, 85777548, JC Power Converter (NA), Telco Manufacturer Ltd, 250,000.00, 1, 250,000.00. The 'Audit Log' tab shows a table with columns for Name, Date, and Action, with several entries including 'Viewed the agreement from an view page', 'Viewed the agreement from a search page', 'Field: Identifier was updated, previously read: CMW Test 05', 'Viewed the agreement from an edit page', 'Completed alert id 2607: 5 Months Agreement Notice', and 'Alert Issued 2742: Monthly Agreement Update'.

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 following screen;

A screenshot of a web application interface. At the top is a navigation bar with links: Home, Agreements, Search, Dashboard, and Alerts (17). Below the navigation bar is a 'back' button. The main heading is 'Add Call Note'. Below this is a text box with the instruction: 'Add a note by adding details to the message box and clicking on Save.' Below the text box is a form with four fields: 'Company Name' (BDE Logistics Ltd), 'User Name' (Pete Johnson), 'Telephone Number' (0116 2923000), and 'Message' (a large empty text area). At the bottom of the form is a 'Save' button.

3. Complete the details and click

A button labeled 'Save Details' with a blue border and a light blue background.

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;

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

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

Open In Email Client Save

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 required.

4.1.2 Creating Follow Ups:

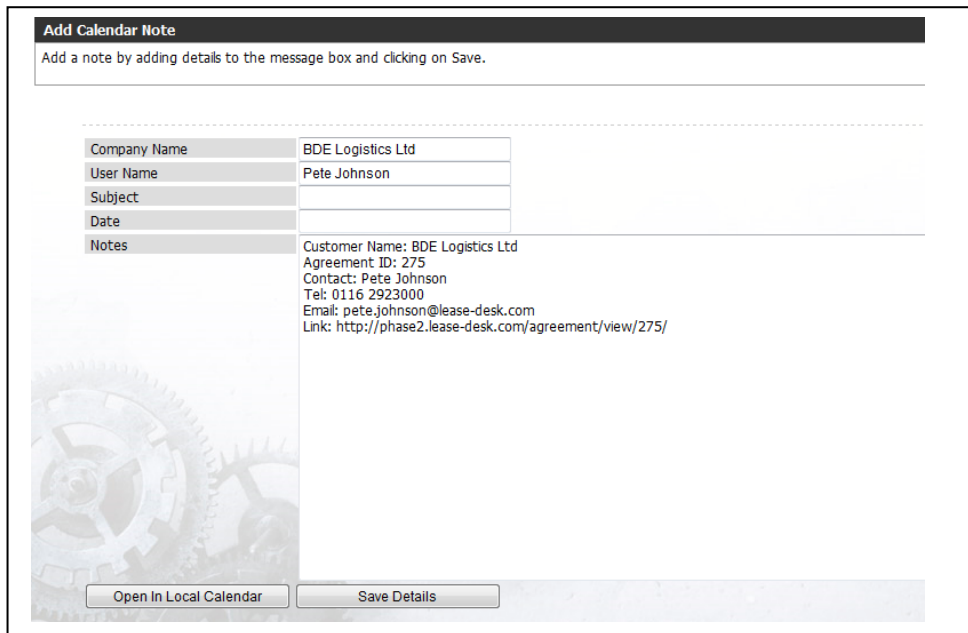
1. Highlight the contact required from the Companies table as indicated below;

<div> <div>Call User</div> <div>Email User</div> <div>Follow Up</div> </div>			
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



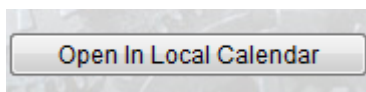
3. You will then be presented with the following screen;

A screenshot of a web form titled 'Add Calendar Note'. The form has a header bar with the title and a sub-instruction: 'Add a note by adding details to the message box and clicking on Save.' Below this is a large text area for notes. To the left of the notes area is a table with fields for 'Company Name', 'User Name', 'Subject', 'Date', and 'Notes'. The 'Company Name' field contains 'BDE Logistics Ltd', 'User Name' contains 'Pete Johnson', and 'Subject' is empty. The 'Date' field is empty. The 'Notes' field contains a detailed note about a customer, agreement, and contact information. At the bottom of the form are two buttons: 'Open In Local Calendar' and 'Save Details'.

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

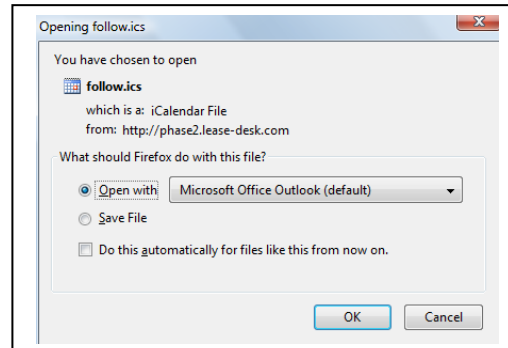
5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

6. Click

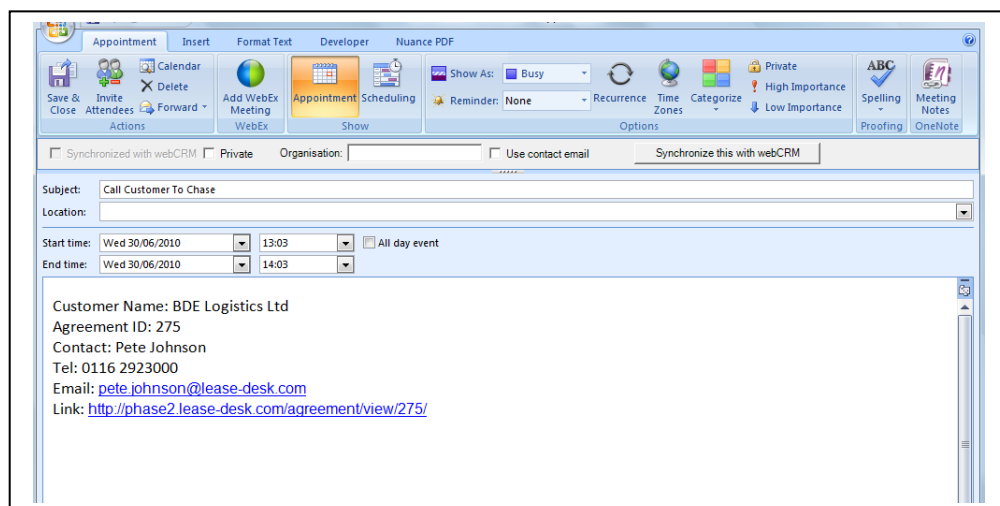


to open up your email.

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



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



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

4.1.3 Adding and Viewing a File:

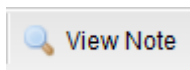
1. To Add or View a File, follow chapter **3.1. Adding and Viewing Files**

4.1.4 Viewing a Note:

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

Notes				
Add Note View Note Summarise				
ID	Type	Name	Note	Date
474	External	Noah Ark	Emailed Rosie agreement details	20/09/2016 15:55:43

2. Highlight the note required and Click



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

LEASE-DESK.COM

Logged in as: Noah Ari

Feedback Logc

Home Agreements Search Dashboard Alerts

back

View Note

Full note details are detailed below.

Username

Noah Ark

Type

External

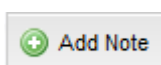
Message

Emailed Rosie agreement details - see email note for ref.

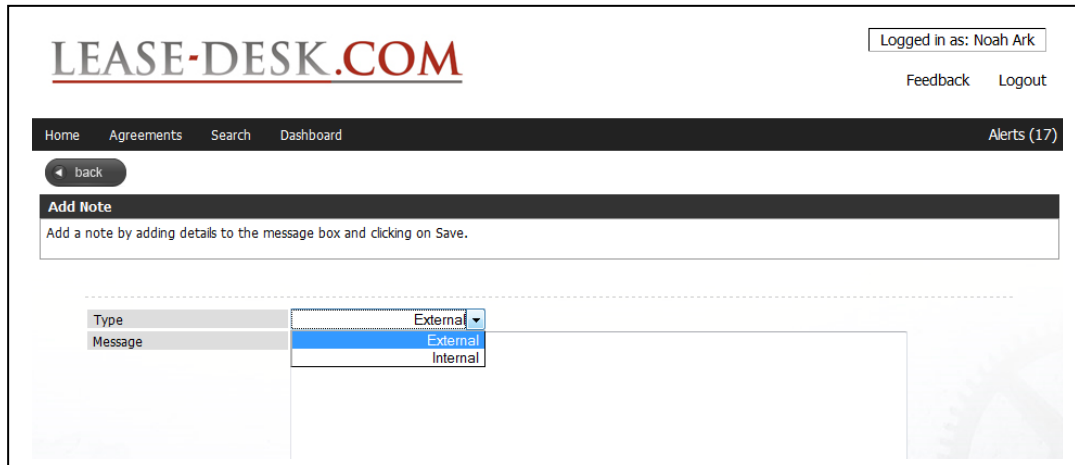
4.1.5 Adding a Note:

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

2. Click



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

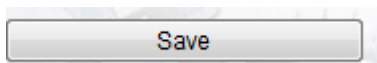


3. Select the Type, i.e. Internal or External.

Note: A standard 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 message box.

5. Click

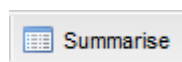


6. You will then be taken back to the main 'View Agreement' screen.

4.1.6 Summarising Notes:

1. Either within the particular agreement required, or via the main agreement list and by

highlighting the particular agreement required, click



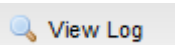
2. You will then be presented with the following View Summarised Notes screen;

The screenshot shows the 'View Summarised Notes' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Noah Ark' is on the right. Below the logo is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. On the right of the navigation bar is 'Alerts (17)'. A 'back' button is visible. The main content area is titled 'View Summarised Notes' and contains a table with the following data:

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

4.2. Viewing an Audit Log:

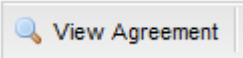
1. There are two ways in which to view the Audit Log against an agreement;

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

The screenshot shows the 'View Audit Log' screen. At the top, the LEASE-DESK.COM logo is on the left, and 'Logged in as: Noah Ark' is on the right. Below the logo is a navigation bar with 'Home', 'Agreements', 'Search', and 'Dashboard'. On the right of the navigation bar is 'Alerts (17)'. A 'back' button is visible. The main content area is titled 'View Audit Log' and contains a table with the following data:

Name	Date	Action
Noah Ark	17/05/2010 09:36:06	Viewed the agreement from an view page
Debra Taylor	10/05/2010 15:51:42	Viewed the agreement from an search page
Noah Ark	08/05/2010 01:10:13	Alert Issued Monthly Agreement Update: 2009
Noah Ark	05/05/2010 10:39:22	Viewed the agreement from an search page
Debra Taylor	30/04/2010 13:22:46	Viewed the agreement from an search page
Debra Taylor	09/04/2010 09:10:39	Field: First Payment Date was updated, previously read: 2005-04-08
Debra Taylor	18/03/2010 14:16:16	Field: Rate Per 1000 was updated, previously read: 34.18 Field: Initial Payment was updated, previously read: 8545.00 Field: Regular Payment was updated, previously read: 8545.00

or

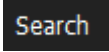
B) Select the Agreement required from the Agreement list and click  and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

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

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

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

5.0 Search:

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

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)
Alerts (11)

[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.

Customer

Name

Agreement Status

Prospect Status

Search

Date Range

From: Jun 2010 To: Jun 2010

Product

Name

Filter Add Remove

Customer

Add Remove

Vendor

Add Remove

Primary Contact

Add Remove

Group

Add Remove

Provider

Add Remove

Financial Product Name

Financial Product Type

Add Remove

Agreement

Months Left

RBO Level

Filter Add Remove

Customer Detail

SIC Code

Filter Add Remove

Post Code

Post

Filter Add Remove

Output Type

Report

View Report

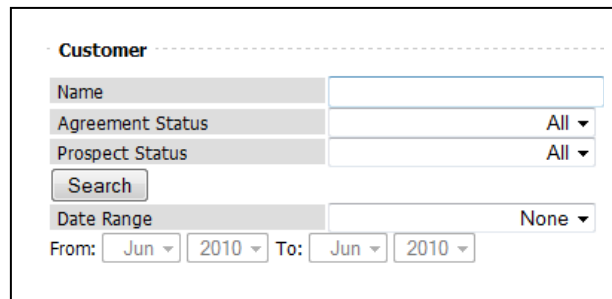
Export to CSV

Reset Form

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

5.1. Searching for Specific Customer Agreement Information:

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



Customer

Name

Agreement Status

Prospect Status

Date Range

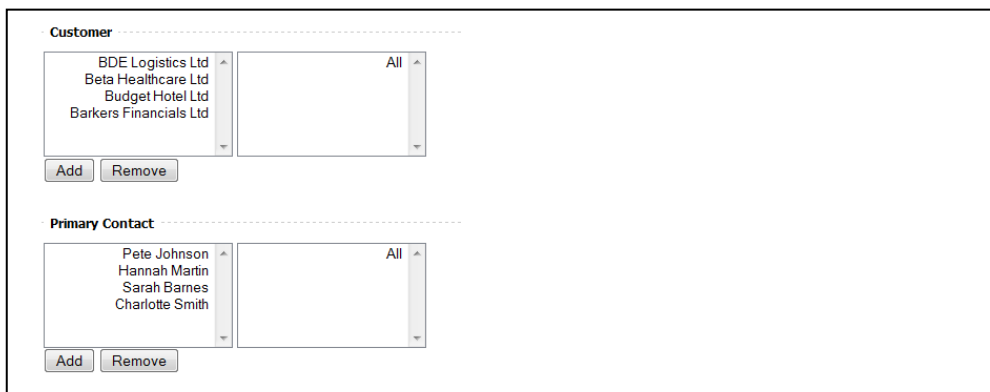
From: To:

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

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

3. Click

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




Customer

BDE Logistics Ltd
Beta Healthcare Ltd
Budget Hotel Ltd
Barkers Financials Ltd

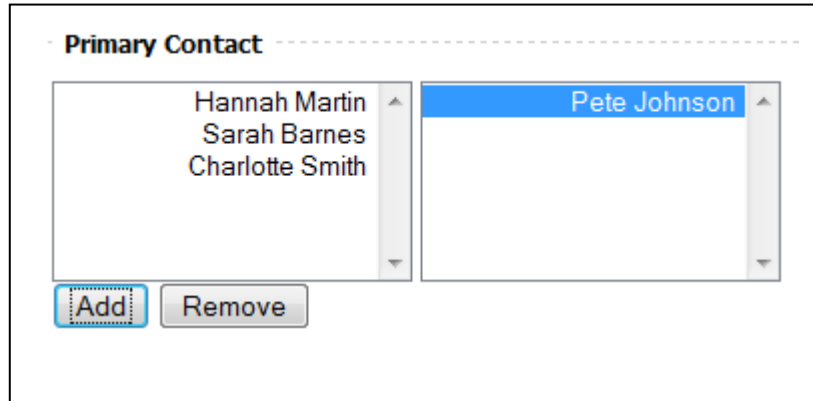
Primary Contact

Pete Johnson
Hannah Martin
Sarah Barnes
Charlotte Smith

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


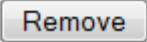
Primary Contact, and then click 

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



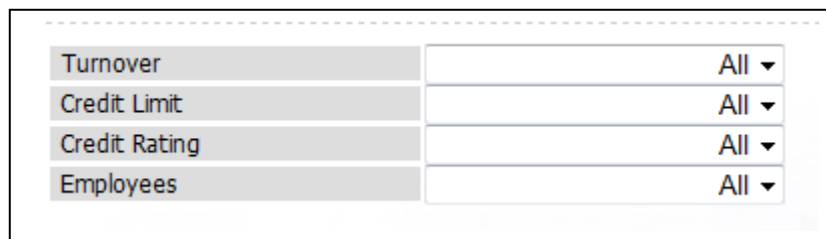
Primary Contact

Hannah Martin Sarah Barnes Charlotte Smith	Pete Johnson
--	--------------

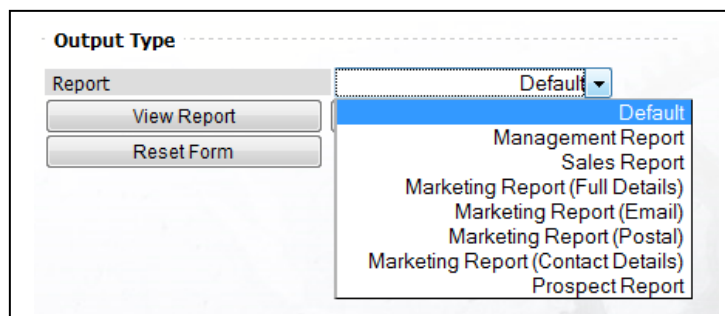
7. Carry on with each table required, following the previous step.

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





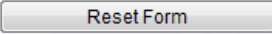
Turnover	All ▼
Credit Limit	All ▼
Credit Rating	All ▼
Employees	All ▼

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



Output Type

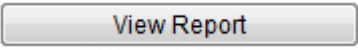
Report: 

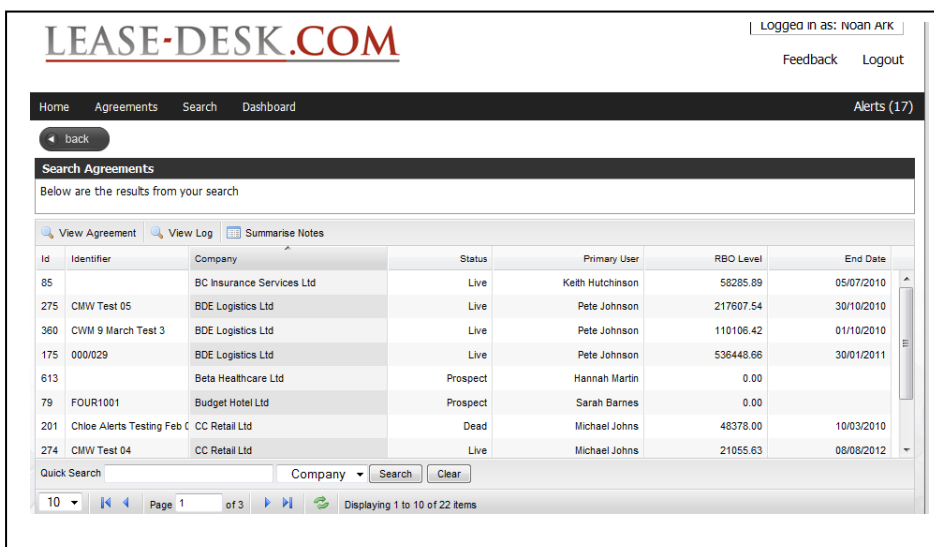
 

- Default
- Management Report
- Sales Report
- Marketing Report (Full Details)
- Marketing Report (Email)
- Marketing Report (Postal)
- Marketing Report (Contact Details)
- Prospect Report

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

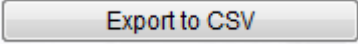
1. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.
2. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.
3. **Marketing Report (Full Details):** With all details listed below.
4. **Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.
5. **Marketing Report (Postal):** As above, minus email but with full address details.
6. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the 'Output Type', and select a report type from the drop down menu.
7. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

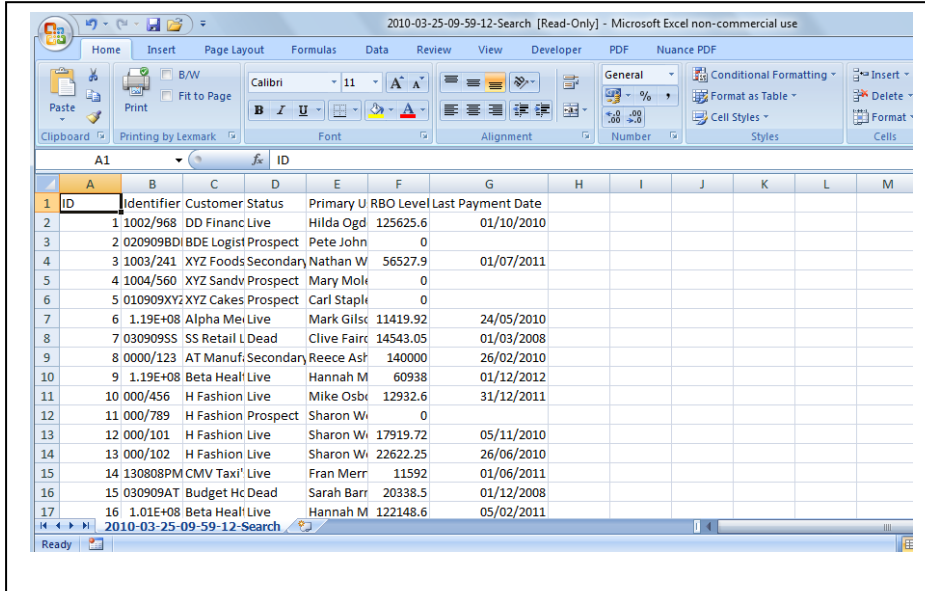
10. Once the report type has been selected, click on  and you will be presented with the data in the below format;



The screenshot shows the LEASE-DESK.COM web application interface. At the top, there is a navigation bar with links for Home, Agreements, Search, and Dashboard. A user is logged in as 'Noan Ark'. Below the navigation bar, there is a section for 'Search Agreements' with a 'back' button. The main content area displays a table of search results. The table has columns for Id, Identifier, Company, Status, Primary User, RBO Level, and End Date. The results show several agreements, including BC Insurance Services Ltd, BDE Logistics Ltd, Beta Healthcare Ltd, Budget Hotel Ltd, and CC Retail Ltd. At the bottom of the table, there is a 'Quick Search' section with a search bar and a 'Company' dropdown menu. The page also shows pagination information: 'Page 1 of 3' and 'Displaying 1 to 10 of 22 items'.

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
85		BC Insurance Services Ltd	Live	Keith Hutchinson	58285.89	05/07/2010
275	CMW Test 05	BDE Logistics Ltd	Live	Pete Johnson	217607.54	30/10/2010
360	CWM 9 March Test 3	BDE Logistics Ltd	Live	Pete Johnson	110106.42	01/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	536448.66	30/01/2011
613		Beta Healthcare Ltd	Prospect	Hannah Martin	0.00	
79	FOUR1001	Budget Hotel Ltd	Prospect	Sarah Barnes	0.00	
201	Chloe Alerts Testing Feb C	CC Retail Ltd	Dead	Michael Johns	48378.00	10/03/2010
274	CMW Test 04	CC Retail Ltd	Live	Michael Johns	21055.63	08/08/2012

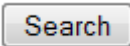
or  to view in CSV format as per the following page;



ID	Identifier	Customer Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ Live	Hilda Ogd	125625.6	01/10/2010
2	020909B01	BDE Logist Prospect	Pete John	0	
3	1003/241	XYZ Foods Secondary	Nathan W	56527.9	01/07/2011
4	1004/560	XYZ Sandv Prospect	Mary Mole	0	
5	010909XYZ	XYZ Cakes Prospect	Carl Staple	0	
6	1.19E+08	Alpha Mei Live	Mark Gilsc	11419.92	24/05/2010
7	030909SS	SS Retail U Dead	Clive Fairc	14543.05	01/03/2008
8	0000/123	AT Manuf: Secondary	Reece Ash	140000	26/02/2010
9	1.19E+08	Beta Heall Live	Hannah M	60938	01/12/2012
10	000/456	H Fashion Live	Mike Osbi	12932.6	31/12/2011
11	000/789	H Fashion Prospect	Sharon Wi	0	
12	000/101	H Fashion Live	Sharon Wi	17919.72	05/11/2010
13	000/102	H Fashion Live	Sharon Wi	22622.25	26/06/2010
14	130808PM	CMV Taxi' Live	Fran Merr	11592	01/06/2011
15	030909AT	Budget Hc Dead	Sarah Barr	20338.5	01/12/2008
16	1.01E+08	Beta Heall Live	Hannah M	122148.6	05/02/2011

5.2. Searching for all Customer Agreement Information:

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

2. Click 

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

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

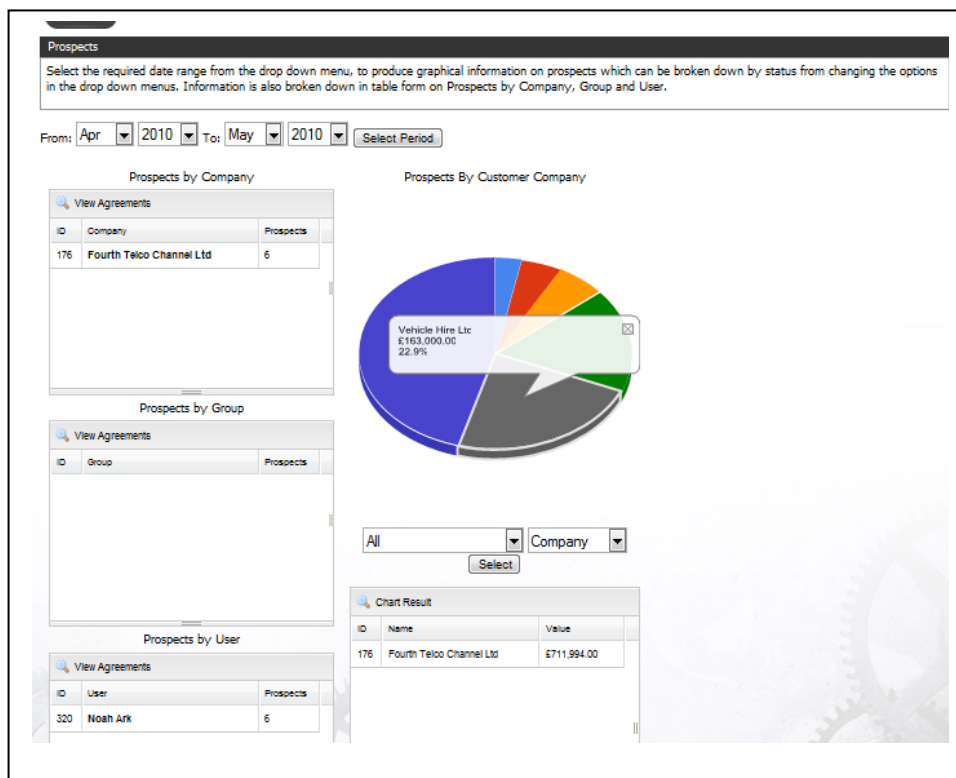
6. Dashboard:

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

6.1. Prospects:

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

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



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

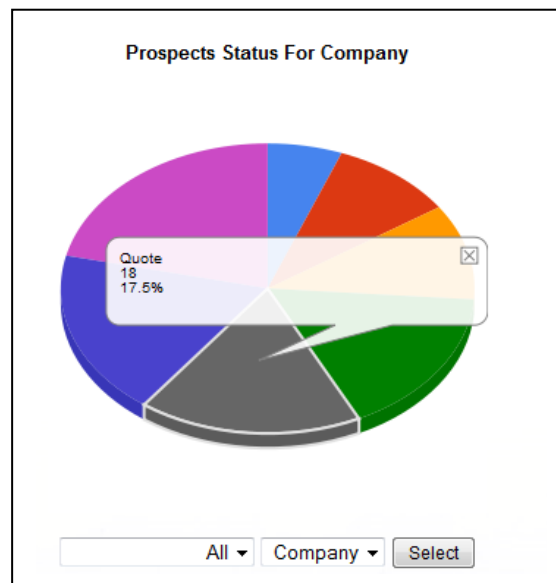
Select Period

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

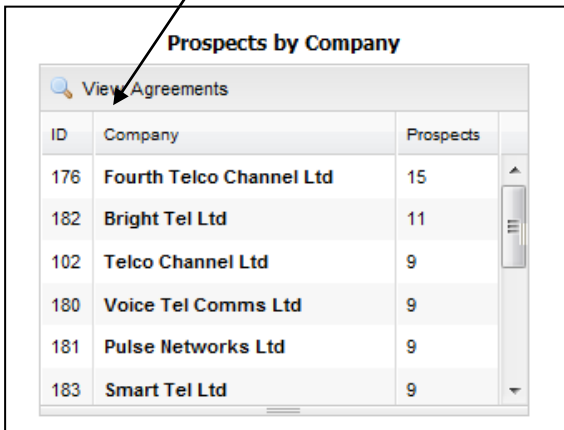
From: Apr 2010 To: May 2010 Select Period

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

All Company Select



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



Prospects by Company

View Agreements

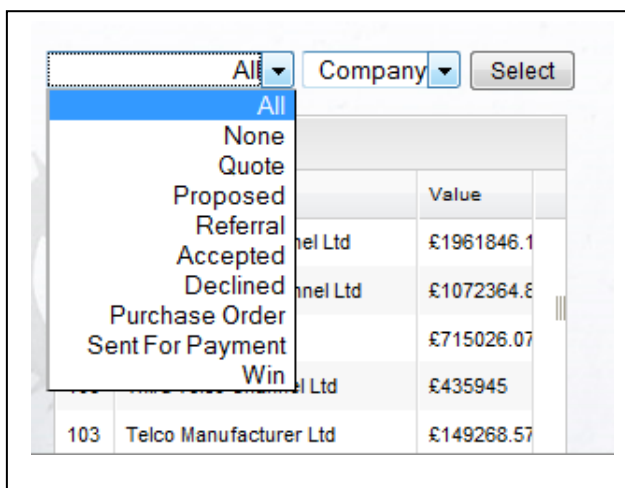
ID	Company	Prospects
176	Fourth Telco Channel Ltd	15
182	Bright Tel Ltd	11
102	Telco Channel Ltd	9
180	Voice Tel Comms Ltd	9
181	Pulse Networks Ltd	9
183	Smart Tel Ltd	9

6. Alternatively, double click on the required line.

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

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.



	Value
103	Telco Manufacturer Ltd

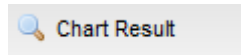
2. Select All, User, Group or Company from the second drop down menu box.

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

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

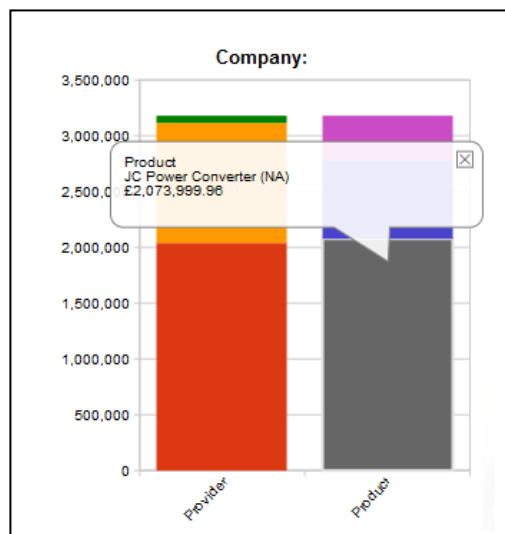
4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click




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

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



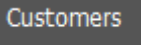
7. To View the Agreement information, highlight the line in the table below the graph and

click  View Agreement

Top Prospects				
 View Agreement				
ID	Name	Value	Provider	
78	Hello Retail Ltd	£325,000.00	Henry Howar	
79	Budget Hotel Ltd	£124,995.00	Siemens Final	

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

← back Printable version

Customers

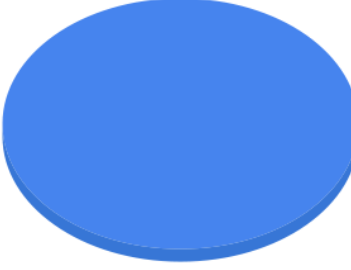
All live Portfolio information can be found on this page, broken down by different sections, e.g. Repeat Business Opportunity by Company etc and in graphical format. change the Portfolio details shown on this page, select the required options from the drop down menus at the bottom of the page. Select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

Repeat Business Opportunity by Company

View Agreements

ID	Company	Value
176	Fourth Telco Channel Ltd	£560,136.88

RBO By Company



Agreements Nearing End Of Term

View Agreement

ID	Company	RBO Value	Months Left
412	TT Engineering Ltd	£48,930.50	
85	BC Insurance Services	£80,285.47	
385	DP Manufacturing Ltd	£23,358.25	
360	BDE Logistics Ltd	£59,542.28	
168	Indigo Marketing Ltd	£46,126.48	
275	BDE Logistics Ltd	£66,891.79	
175	BDE Logistics Ltd	£52,758.60	
202	CC Retail Ltd	£74,490.83	
368	KM Property Services	£30,348.78	

Repeat Business Opportunity by Group

View Agreements

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

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

View Agreements

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

Home Agreements Search Dashboard Alerts (17)

← back

Repeat Business Opportunity by Company

Below are the results from your search

View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
85		BC Insurance Services Ltd	Live	Keith Hutchinson	58285.89	05/07/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	536448.66	30/01/2011
275	CMW Test 05	BDE Logistics Ltd	Live	Pete Johnson	217607.54	30/10/2010
360	CWM 9 March Test 3	BDE Logistics Ltd	Live	Pete Johnson	110106.42	01/10/2010
413	RBO TEST	CC Retail Ltd	Live	Michael Johns	8722.88	10/12/2011
274	CMW Test 04	CC Retail Ltd	Live	Michael Johns	21055.63	08/08/2012
202	Chloe Alerts Testing 9 Fet	CC Retail Ltd	Live	Michael Johns	117023.10	10/02/2011
237	Chloe Alerts Testing 23 Fe	CMV Taxi's	Live	Fran Merryweather	25670.00	24/08/2011

Quick Search Company

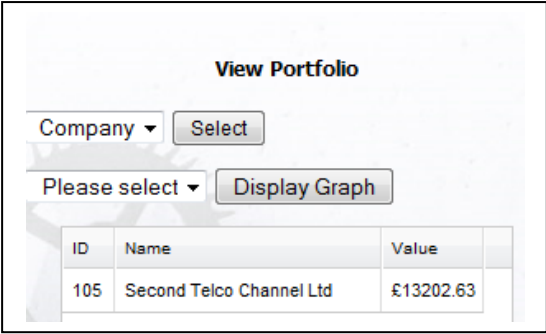
10 Page 1 of 2 Displaying 1 to 10 of 14 items

Total	Amount
RBO	1,789,246.55
Prospects	0.00

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

6.2.1 Viewing/Amending Portfolio Information:

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



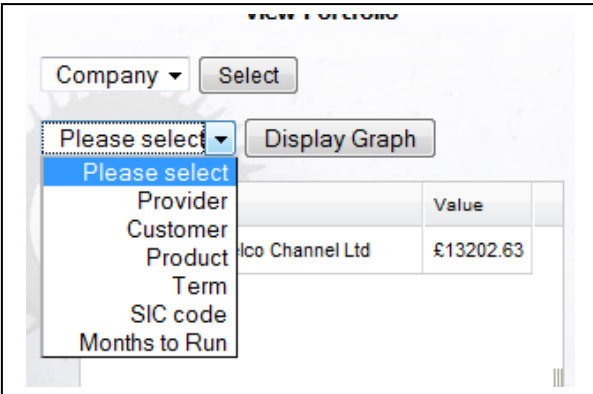
ID	Name	Value
105	Second Telco Channel Ltd	£13202.63

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


3. Click 

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

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



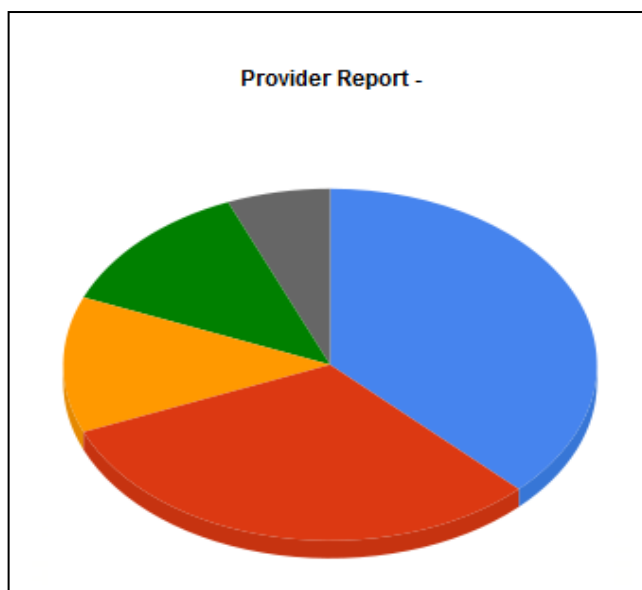
ID	Name	Value
105	Second Telco Channel Ltd	£13202.63

A rectangular button with a light gray border and a subtle gradient, containing the text "Display Graph" in a dark gray font.

6. Highlight the required row from the table and click

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

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



7. Alerts:

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

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

The Alert Triggers are as follows;

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

7.1 Viewing Alerts:

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

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

LEASE-DESK.COM Logged in as: Noah Ark
Feedback Logout

Home Agreements Search Dashboard Alerts (17)

back

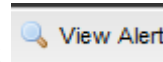
My Alerts
A full list of pending alerts requiring user action.

ID	Recipient	Company	Groups	Message	Time
1693	Noah Ark	Fourth Telco Channel Ltd	4th Telco Channel SME Telco Man Enterprise Channel Tea Eddie Large	New prospect agreement: Customer Name: Solto Technology Ltd Agreement ID: 573 Agreement Value: 19932.71 Provider: Henry Howard Finance PLC Regular Payment: 661.97 Payment Profile: 1+35 Financial Product Type: Finance Lease Financial Product Name: Fixed Term Rental Agreement Term Of Contract: Fixed Period Cancellation Notice: 90 Insurance Action: Forward Insurance Certificate Link: http://lease-desk.com/agreement/view/573/	22/04/2010 16:48:54

Quick Search Recipient Search Clear

10 Done 1 of 2 Displaying 1 to 10 of 17 items

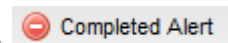
3. To view an alert, highlight the required alert and click



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

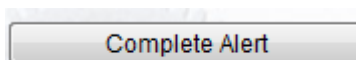
7.2 Completing Alerts:

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



from

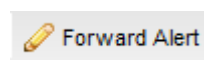
the main alert list view or



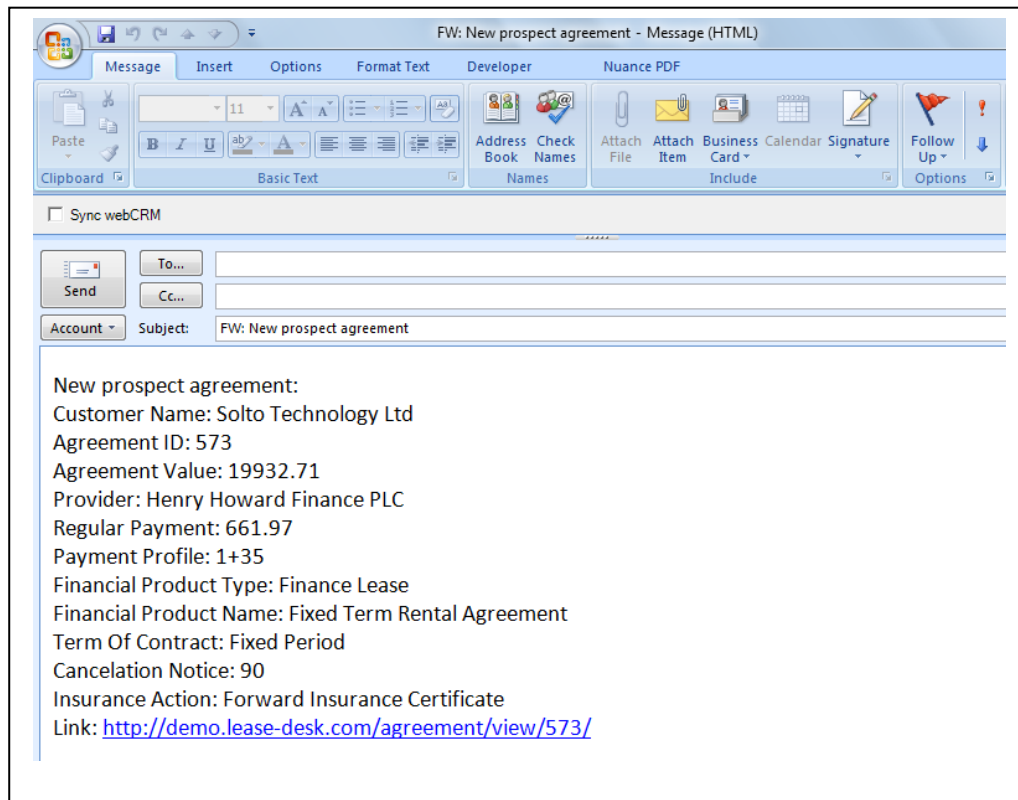
from the 'View Alert' Screen.

7.3 Forwarding Alerts:

1. From the 'My Alerts' main view, highlight the required alert and click



2. The alert will then be created in mail format allowing you to forward to the relevant contact as per below;

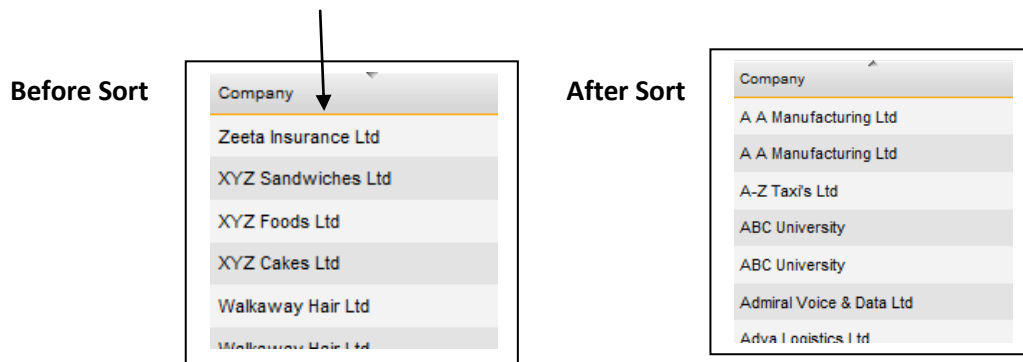


8. General Functionality:

8.1. Sort:

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

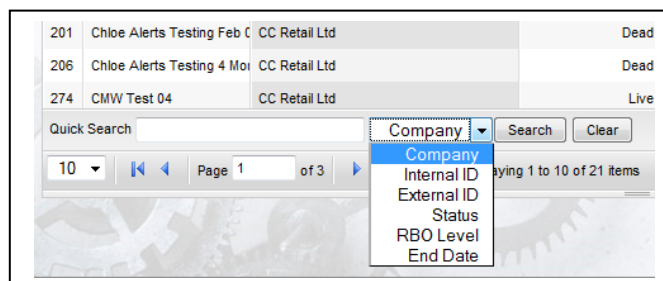
1. To sort a table using the headings of the columns to show the tables contents is alphabetical/numerical order click on the column title.

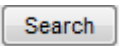


8.2 Quick Search:

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

1. To use the quick search functionality, at the bottom of the screen. To change the Search option, click on the drop down menu as per below;



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

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

Quick Search

Company

10

Page 1 of 1

Displaying 1 to 5 of 5 items





3. Click  to start from the beginning.

8.3 Refresh:

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

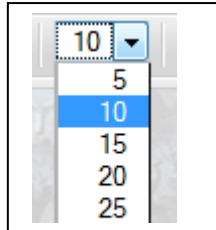
8.4 Scrolling through records:

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

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

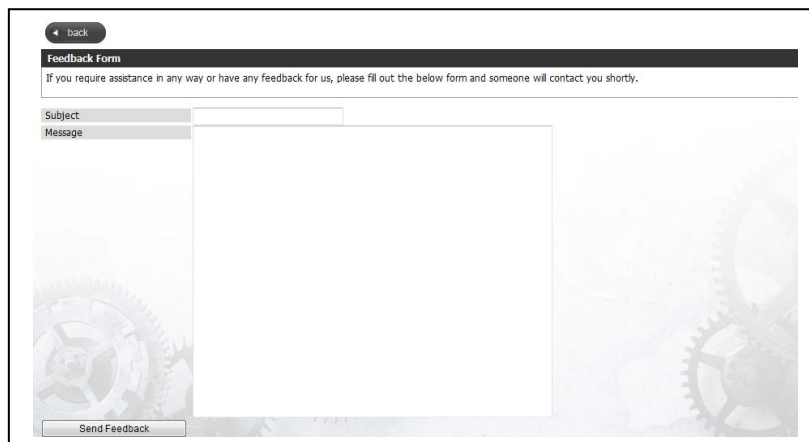
8.5 Changing the amount of records per view:

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



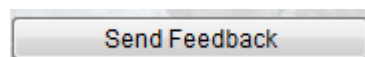
9. Feedback:

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

A screenshot of the 'Feedback Form' screen. At the top, there is a 'back' button. Below it, the title 'Feedback Form' is displayed. A message reads: '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.' The form consists of two main sections: 'Subject' and 'Message'. The 'Subject' section has a text input field. The 'Message' section has a larger text area. At the bottom of the form, there is a 'Send Feedback' button. The background of the form features a faint image of interlocking gears.

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

7. Once completed, click



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

Feedback Form: Complete

Thank you for completing the feedback form

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

10. Frequently Asked Questions:

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

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

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

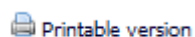
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

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

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

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

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



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

11. Contact Details:

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

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

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