**Lease-Desk Version 2.0 Summary:**



**Major Changes - Agreements Screen:**

* **Customer Information:** Normal and Main users are now able to view the end customers Credit Rating, Credit Limit and Analysis date information.
* **Summarise Notes:** Users can now view a summary of all notes on an agreement.
* **Notes Functionality:** When users add an internal note to an agreement, an email gets generated to everyone able to view the particular agreement.
* **Audit Log:** This now indicates when a user has viewed an agreement and/or searched using the search screen and in addition displays when an alert has been completed by a user.

The Audit Log is now visible via the Agreement screen.

* **Call User:** Users can now bring up the contact details for all users associated within an agreement and save as a note.
* **Email User:** Users can now bring up the email details for all users associated within an agreement and send an email through the users email client and save the note as well.
* **Products:** The table has been increased in size and now has a ‘Print’ option in order to print out the whole product list.

Quick Search has also been added both visible via the Companies page and Agreements page.

* **Prev/Next Buttons:** These are now visible at the top of Agreements (via the Search screen results or normal Agreement List screen)
* **Dashboards:** Now has a click through functionality on graphs.

Pie Charts now have a ‘View by all’ option added to Prospect and Customer

* **Alerts:** Now have a forward email alert option so users can email an alert if required.

‘Complete Alert’ has now been added to each individual alert view screen.

When a Minimum Term moves to Secondary Rentals the status is automatically updated to ‘Secondary Rentals’ and an alert is generated to all users associated with the agreement.

**Administration Changes:**

* **Change Primary:** (on Vendors) We can now quickly changed a primary Vendor user against an agreement if they leave their existing company.
* **Delete Multiple Products on Agreements/Companies** (Vendor) via Product Table:

We now have the capability to delete multiple products if required.

**Minor Changes: (Admin)**

* **Admin:** Adding an agreement, once complete now keeps you on the edit screen so users can check the details entered and make any additional changes if required.
* **Groups:** Now moved to individual page, also accessible via Users and Companies screens and editable via there. In addition, users can no longer be added more than once to the same group (caused previous issues) and now disappear from the list once chosen. Edit Group members now added in addition to delete option.

**Minor Changes: (Standard)**

* **Quick Search:** Now a permanent function, improving speed and access.
* **Button Consistency:** Various buttons now changed throughout the system, i.e. ‘Save Changes’ or ‘Save Details’.
* **Dashboard:** Agreements nearing end of term with 3 months or less are now in red in order to stand out more as urgent priorities.