



# Asset Request Form User Guide

LeaseAccelerator

Version 25.2



# Document Information

## Notices

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This guide is designed to help you to use the LeaseAccelerator applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.



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# Introduction

LeaseAccelerator offers the ability to create a Lease vs. Buy (LvB) Analysis using the mailback system and an Asset Request Form. The Asset Request Form (ARF) is an Excel workbook template. When correctly filled out and emailed to your production environment, it automatically creates a Lease vs. Buy Analysis, which helps determine if the asset should be leased or purchased.

To properly use the ARF and the Lease vs. Buy features, you must configure your environment with Lessee Rates, which includes Debt and Equity Rates, Tax Rates, Tax Depreciation Methods, along with Lessee Info that includes Debt Weight and Fiscal Calendar.

More information on Lease vs. Buy is available in the LeaseAccelerator User Guide - Lease Versus Buy (LvB).

## Using the ARF

We have enabled the generation of a customer-specific ARF found in the Reporting workspace under the Origination tile. The ARF consists of two tabs with all required fields in red font. With one click on the Export button, the system generates the ARF template with your company's specific participants in the drop-down fields.

**Note:** Before a user may generate the ARF, it must be enabled for specific Access Levels within Access Control on the Report Access tile.

Follow these steps to generate an ARF

1. Navigate to the Reporting workspace from the Left NavBar.
2. Go to the Origination tile.
3. Select the Asset Request Form from the Right NavBar.
4. Click **Export** to download a customer-specific ARF.

The purpose of this form is to provide a convenient and automated method of initiating a preliminary Lease vs. Buy analysis. Once completed, the form, along with any additional information (quotes, proposals, etc.), will be emailed to a customer-specific email contained within the Template tab of the ARF. The LvB analysis will usually be mailed back to the end-user within 2 hours.

Once downloaded, the user should populate the ARF with the necessary data. The form allows you to select or enter information specific to the equipment you want to analyze and create a lease versus buy.

**Please note that this file is an Excel file with an xlsx extension. Please do not change the extension, or it will cause issues with population and mailback functionality.**

**Note:** Do not populate the LvB Name field. It will auto-populate based on other information you enter. Additionally, do not copy and paste information into the fields as this may introduce special characters and extra spacing which could cause the ARF not to process properly.

Follow these steps to populate an ARF

1. Save the downloaded ARF with a unique file name.
2. Start on the Template tab and pick an appropriate Business Unit from the drop-down.

 **Note:** Any field in red is required and must be populated.

3. Next, select the appropriate Lessee from the drop-down. This information will drive the rates used for the LvB.
4. Select the appropriate Country from the drop-down. The selection should be the physical equipment location. This information also drives the rates used for the LvB.
5. Select the appropriate Analyst, Order Administrator, Asset User, and Asset Owner from the respective drop-downs.
6. Next, populate the relevant fields for the anticipated Lease Start Date of the proposed lease transaction. You must use the drop-downs for each field. The quote you received from the vendor will often have an estimated delivery date, and we recommend using that date. This date should best represent when you could start using the equipment. Note: If you do not specify a lease start date, LA will count forward two weeks from the current date, then use the first day of the following calendar month as the lease start date.
7. Indicate the correct Transaction Currency from the drop-down. The currency may be indicated on any quote that you receive from a vendor.
8. Select the New Lease Payment Frequency from the drop-down. Note: If you do not select a Frequency, LA will default to Monthly.
9. Input the New Lease Term in months, even if the payment frequency is non-monthly.
10. Input the New Lease Estimated Payment Amount per Period for the total number of assets if the quantity is more than one. The period should match the payment frequency and not include taxes or other miscellaneous fees.
11. Select **Yes** or **No** from the drop-down for Are the assets specialized for lessee use? if the assets meet the Standard's conditions.

 **Note:** This selection applies to all assets on the lease.

12. Add any additional comments or information in the box provided.
13. Select the **Details** tab.
14. Select the appropriate Product Category from the drop-down.
15. Input relevant details in the Product Number and Manufacturer fields. Any non-required information included in the ARF will appear in the Lease vs. Buy in the UI.

16. An Asset Description is required and drives the automated LvB Name on the Template tab.
17. Enter the correct Quantity.

 **Note:** Please use one line item for each asset if you want to capture all detail in the UI.

18. Enter the Unit Purchase Price.
19. Save the ARF, ensuring you are using the xlsx extension.

## Submitting the ARF

Once you save the populated ARF, you are ready to submit the ARF to LeaseAccelerator. Include the ARF and any related documents, such as quotes or proposals, in an email sent to your customer-specific LvB mailback email address. The user will receive an email response containing all original documentation plus the PDF of the LvB based on the data collected in the ARF. Additionally, the ARF creates an LvB record within the user interface which aids in entering a lease schedule and follows the UI workflow for new lease origination.

Follow these steps to submit an ARF

1. Create a new email to be sent to your customer-specific LvB mailback email address, [customername-lvb@leaseaccelerator.com](mailto:customername-lvb@leaseaccelerator.com). This email address is on the Template tab of the downloaded Asset Request Form (ARF).

The best practice is to use your company name and the LvB Name from the ARF as your Subject.

 **Note:** Only submit one ARF (in .xlsx format) with each email. You do not need to include any text in the body of the email, but you should attach the ARF and any other relevant documents such as quotes or proposals from the vendors. If you attach multiple Excel attachments, the ARF must contain "Asset Request" or "Asset\_Request" in the title.

2. Send the email and await an email response. Your ARF will automatically generate and email you a preliminary Lease vs. Buy Analysis when successfully submitted.
3. If there is a mistake or error in the ARF submission, the user will receive an email with the subject "LvB request will be delayed," explaining why the LVB was not generated. The user is requested to correct the ARF and send it back to the email address, [customername-lvb@leaseaccelerator.com](mailto:customername-lvb@leaseaccelerator.com)

## Delayed LvBs

When emailing an Asset Request Form (ARF) to the company's LvB email address, there are times when the system cannot process the form correctly due to errors. If the system receives an ARF that it cannot process correctly, the sender gets a reply containing the ARF and all attachments. The LvB originator and LeaseAccelerator Staff will receive this email to help identify why the process failed.

# Version Summary

Version	Changes/ Updates	Date
22R1	Guide created.	1/03/2022
23R4	Replaced Customer with Customer.	10/31/2023
24R2.3	Added Specialized Asset selection to the steps to populate the ARF and returned Customer to Customer.	08/07/2024

