Submitting a Proposal

PureLease

Version 25.2

Document Information

Notices

Copyright

Disclaimer

This guide is designed to help you to use the PureLease 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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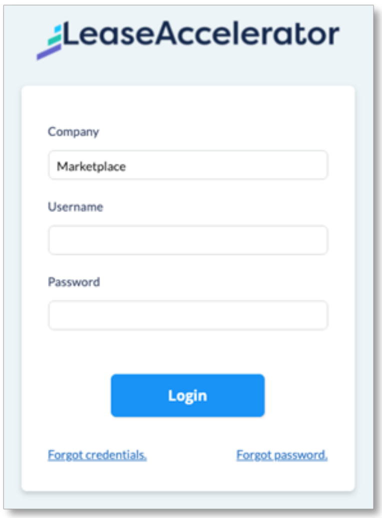
Introduction to Submitting a PureLease Proposal

Welcome to LeaseAccelerator's Global Lease Marketplace, the place to submit proposals for current and possible new customers alike. This guide will walk you through the simple process of submitting a proposal through LeaseAccelerator's web-based platform.



Logging In

1. Open any HTML 5-compliant browser client with JavaScript enabled, including Chrome, Firefox, Edge, and Internet Explorer 11 or higher. LeaseAccelerator recommends using Chrome.

2. Enter address: http://www.leaseaccelerator.com/lease_accelerator.

3. Enter your login credentials. The Company name is *Marketplace*.

4. Enter your Username and Password.

If you forgot or don't know your username, click the **Forgot credentials** link and an email will be sent to the email address on file with your username.

If you do not know your Password, click the **Forgot Password** link and an email will be sent to reset your password.

Home Workspace

The Home workspace will display a list of To-Dos. These are actions that a user may take and include:

- Create a Proposal
- Answer a Question

- Approve Award (When awarded an RFP)

Actions that are pending in your account are called To-Dos and may be grouped by:

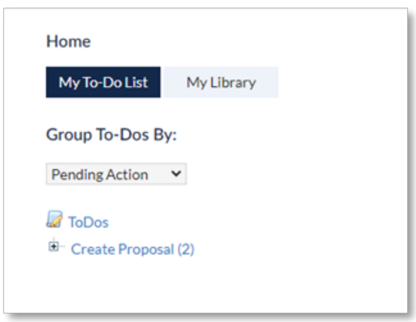
- **Pending Action:** Groups deals by the action required to be taken, for a Lessor's purpose you would see Create Proposal.

- **Deal Value:** Groups actions based first on the currency of the deal then the monetary value.

- **RFP:** Groups actions by the Request for Proposals (RFP) submitted.

- **Days Outstanding:** Groups actions first by the number of days since the action was requested then by RFP name.

- Groups actions by Lessee then RFP name.



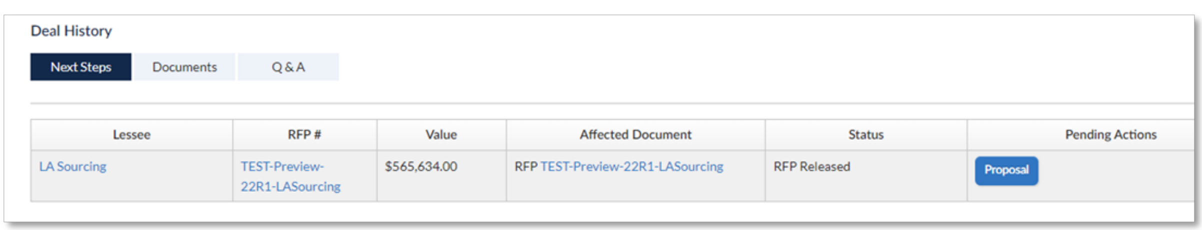
In order to see the detail of an RFP that requires action, the first step to be taken is to click the RFP Name and Cost link, which is the second expanded link, to go to Deal History.

Deal History

The Deal History section of an RFP has three tiles: Next Steps, Documents, and Q&A. Each tile offers further functionality as detailed below.

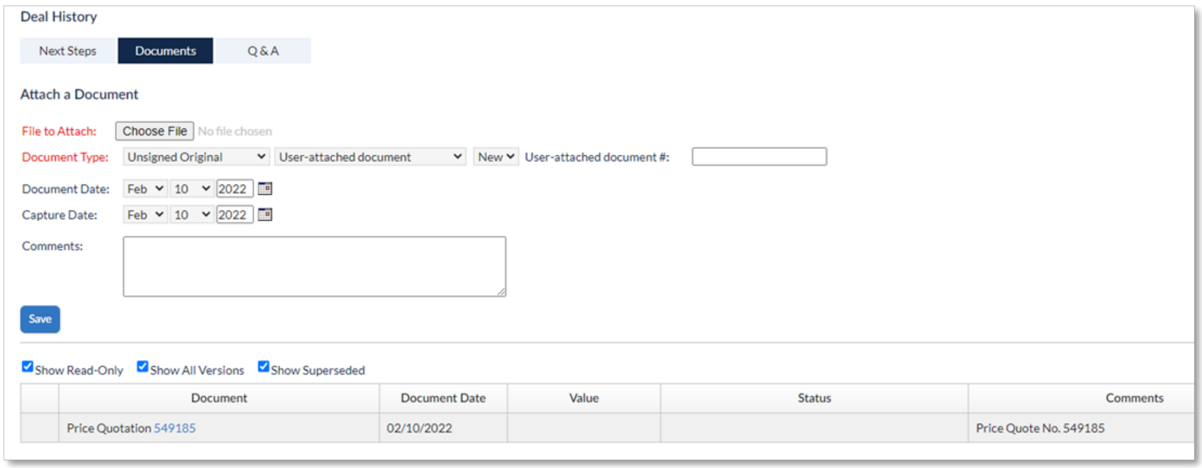
Next Steps

This tile shows the next pending action that is due within the RFP, as well as the ability to download the RFP document for viewing.



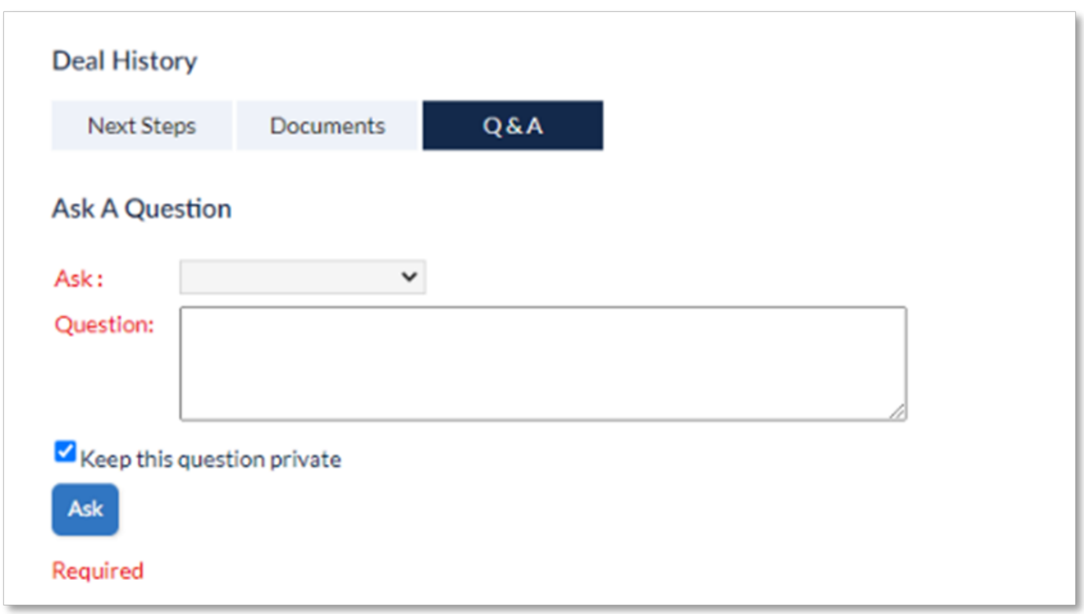
Documents

The Documents tile is where you can view any documents attached to the RFP, including the supplier quote and any additional documents provided by the customer. The documents tile is also where documents that you would like to accompany your proposal can be attached. Documents should be attached AFTER you have entered, saved, and submitted your proposal. Instructions for attaching documents will be provided later in the process. Once you create and then save your proposal, the Documents tile will also contain a PDF of your proposal detail entered. Clicking the kebab next to the document name in the Documents tile will provide you with a menu of actions you can take on a proposal or RFP.



Q&A

The Q&A tile is where you will pose or answer questions pertaining to the RFP.



Submitting a PureLease Proposal

Clicking the Proposal button takes you into the Proposal workspace where there are six tiles of information:

- **RFP:** Lists the RFP name and Summary of Funding Preferences

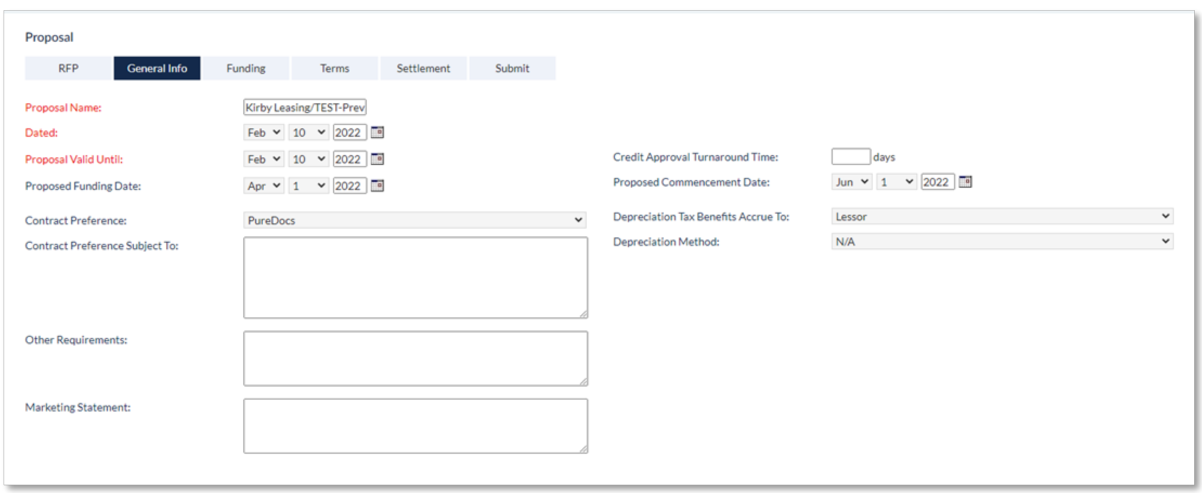
- **General Info:** This tile contains the Proposal name, Date and Proposal Valid Date, all of which are auto-populated, but can be changed. This tile is where information on the credit turn around time, contract preference, tax benefit and depreciation method can be entered. There are also free form boxes for adding additional information, such as marketing statements.

- **Funding:** This tile is for viewing and specifying a change in fund amount, fund dates, or asset costs. This tile allows you to build a funding schedule where you can specify more than one fund date to take place for an RFP. The only time this tile would need to be changed is if you do not wish to support the entire transaction.

- **Terms:** Payment basis, lease type, payment frequency, and number of payments as well as end-of-term options. By clicking on the edit icon next to the term lines, you are able to go in and enter the LRF you will provide for that particular term.

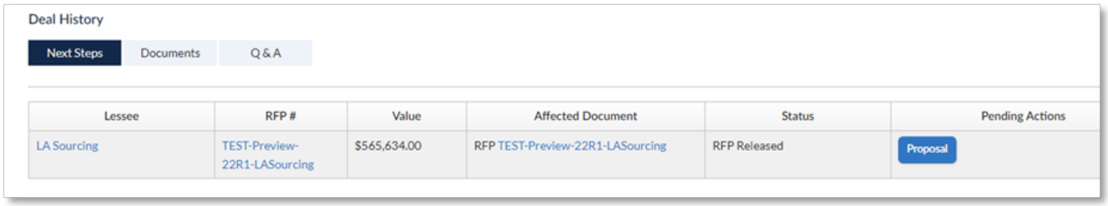
- **Settlement:** This tile contains Closing Requirements, which are boxes that are checked. This tile also gives you the option to enter any additional closing requirements that your company might have.

- **Submit:** This tile contains the information about LeaseAccelerator's 1% transaction fee, by clicking the Save & Review button you are agreeing to this transaction fee.

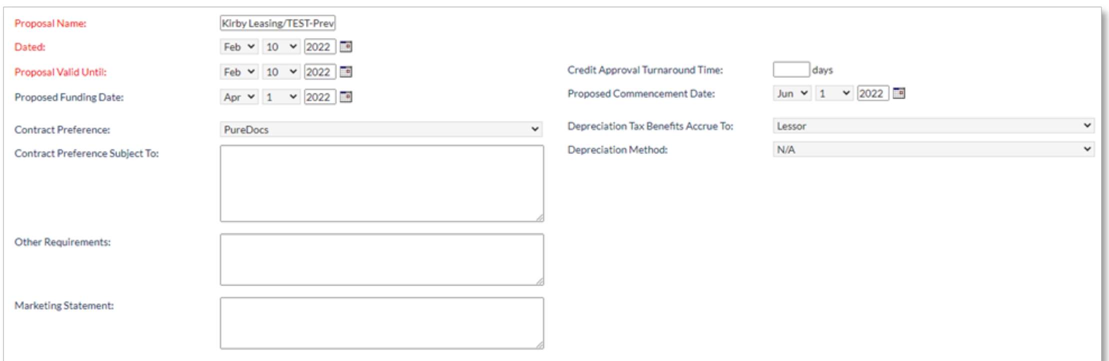


Follow the steps below to submit a proposal:

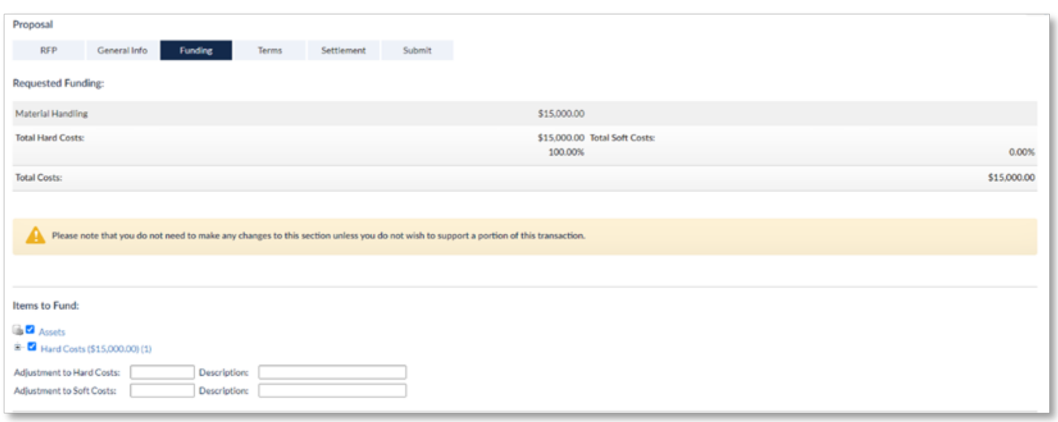
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Next Steps tile, click Proposal in the Pending Actions column.



</td></tr>
<tr><td>2</td><td>This will take you to the RFP workspace and you can view a summary of the RFP detail by going to the RFP tile.</td></tr>
<tr><td>3</td><td>On the General Info tile, the Proposal Name is auto-populated.

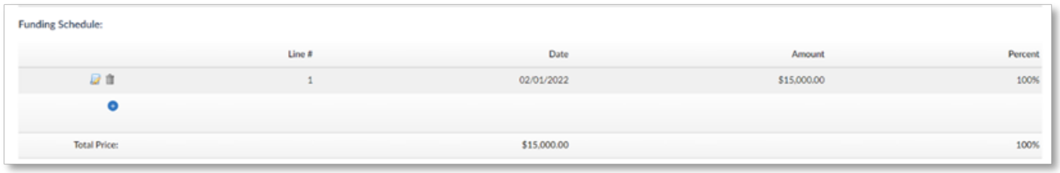


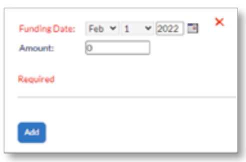
Note: Any field in red is required.</td></tr>
<tr><td>4</td><td>Next, enter the Proposal Date. This defaults to the current date.</td></tr>
<tr><td>5</td><td>Now enter Valid Until date. This is the proposal expiration date.</td></tr>
<tr><td>6</td><td>The remaining fields are either optional or are pre-populated with information selected by the Lessee.</td></tr>
<tr><td>7</td><td>Go to the Funding tile. By default, the Items to Fund will already be checked indicating you accept the equipment as listed on the RFP and will propose on it.

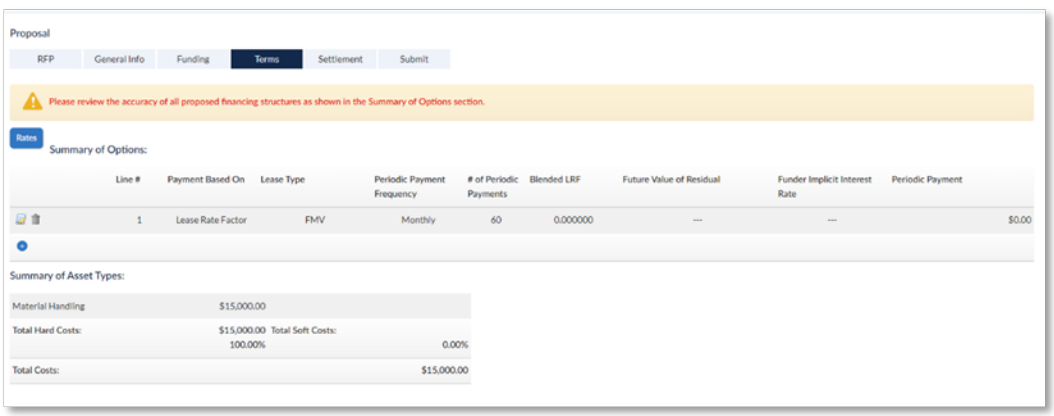


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>If necessary, adjust the cost of equipment. If the total costs and proposed funding date are acceptable, there is no need to change anything on this tile.</td></tr>
<tr><td>9</td><td>If your proposal requires a change to the proposed fund date, click the Edit icon next to the line item to edit the funding schedule line items and modify the Funding Date and/or Amount.

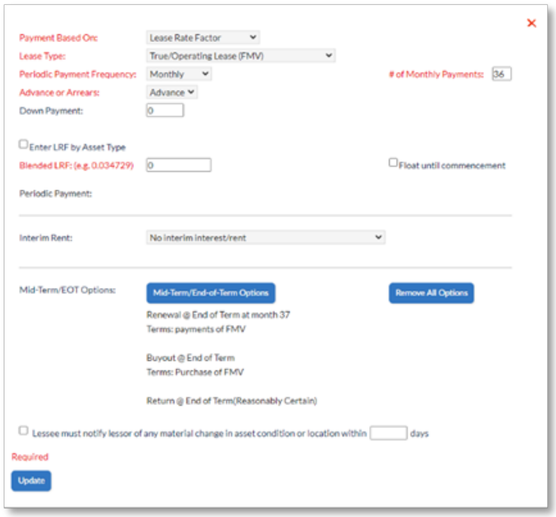


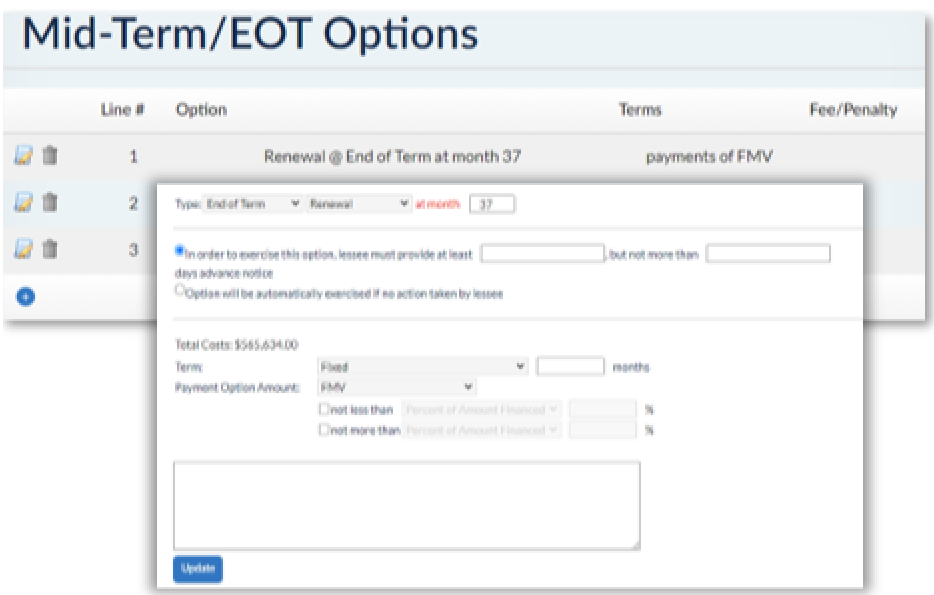

</td></tr>
<tr><td>10</td><td>Go to the Terms tile.


</td></tr>
<tr><td>11</td><td>The term structures of the RFP are provided in the Summary of Option section and you can update this information by clicking the edit icon and updating information in the pop-up.</td></tr>
<tr><td>12</td><td>Specify the Lease Rate Factor (LRF) or payment amount for your proposal based on the RFP detail.</td></tr>
<tr><td>13</td><td>To propose a separate term structure, click theplus sign.</td></tr>
</table>

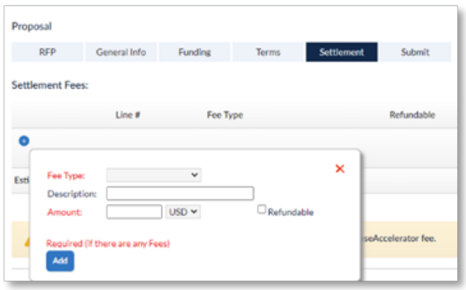
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>In the pop-up, enter the new structure with a different lease type, term period, payment, etc.

Note: Incomplete options must be updated or deleted before submitting your Proposal.

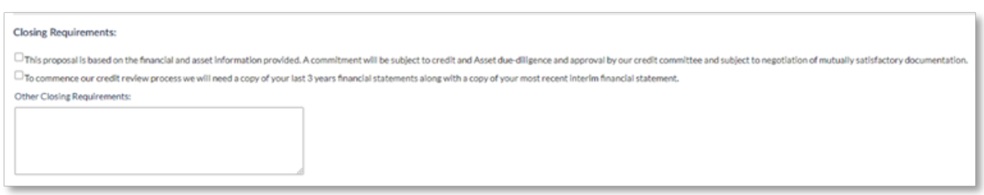

</td></tr>
<tr><td>15</td><td>In the Mid-term/EOT Options section, the Lessee selected, if any, will show in the summary form next to the Mid-Term/End-of-Term Options button. Click the button to enter your proposed options.

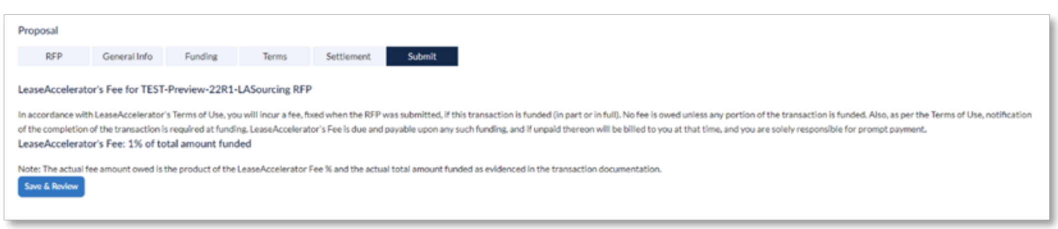

</td></tr>
<tr><td>16</td><td>Indicate any caps, floors, or associated fees.</td></tr>
<tr><td>17</td><td>Click **Update** after making all necessary changes.</td></tr>
<tr><td>18</td><td>If you would like to add a new option, click the **plus sign**.</td></tr>
</table>

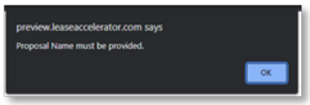
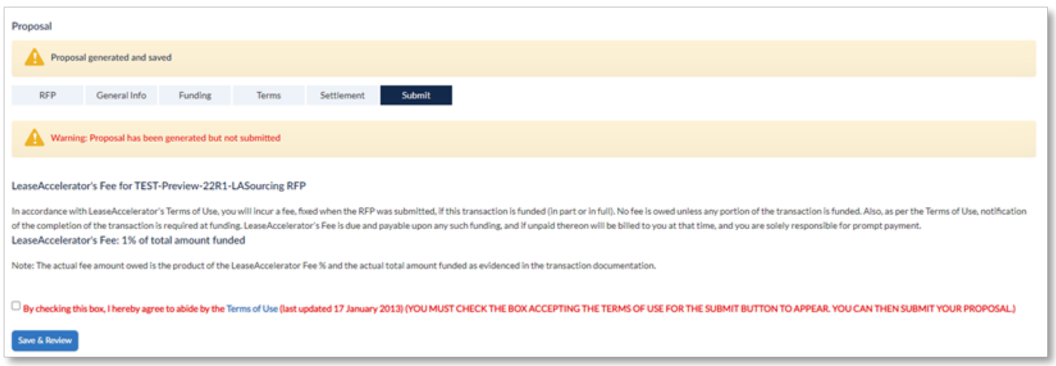
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19</td><td>Populate relevant fields, then click Add.</td></tr>
<tr><td>20</td><td>After all options are entered/updated, click Submit.</td></tr>
<tr><td>21</td><td>Click Add or Update to save your proposal response for that line item.</td></tr>
<tr><td>22</td><td>If you have any fees associated with doing the deal, the amount and fee types are entered on the Settlement tile. Click the plus sign to add new fee. If you have no additional fees, no action is required and you may continue to the Submit tile.

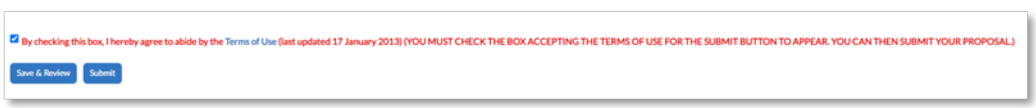


Note: Settlement Fees are fees payable by the Lessee and should not include the LeaseAccelerator fee.</td></tr>
<tr><td>23</td><td>Select the Fee Type from the drop-down.</td></tr>
<tr><td>24</td><td>Enter a Description for the fee.</td></tr>
<tr><td>25</td><td>Enter the Amount of the fee.</td></tr>
<tr><td>26</td><td>Indicate the currency for the fee. This typically will be the same currency the deal will be transacted in.</td></tr>
<tr><td>27</td><td>If this fee is refundable, check the appropriate box.</td></tr>
<tr><td>28</td><td>Click Add to save this new fee.</td></tr>
<tr><td>29</td><td>The are pre-populated items under Closing Requirements that can be checked if they apply, as well as a free form box to add additional closing requirements your company might have.


</td></tr>
<tr><td>30</td><td>Go to the Submit tile.

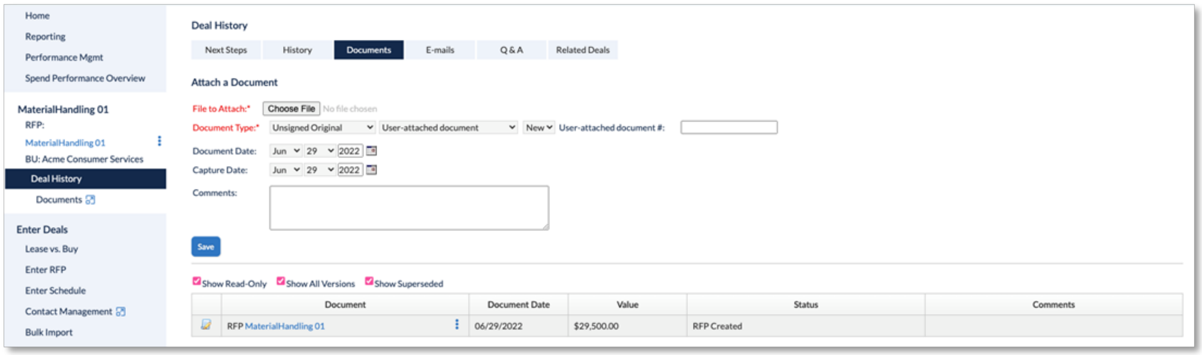

</td></tr>
</table>

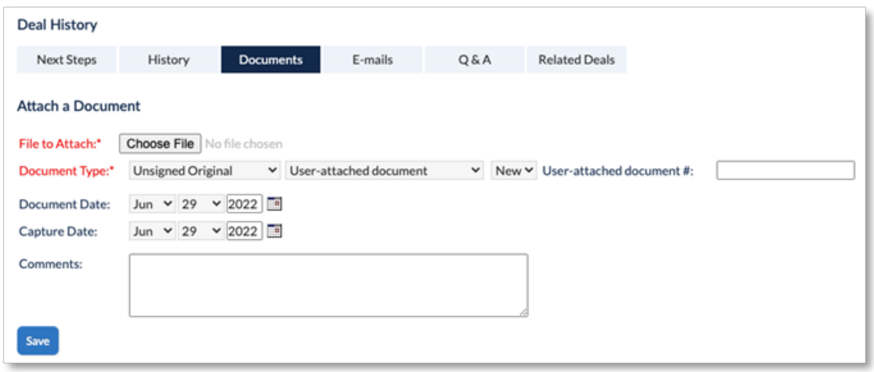
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>31</td><td>Click Save and Review and a validation of your proposal will be done and any required fields or information not entered properly will be flagged and a pop-up will appear alerting you to the need for a correction.

</td></tr>
<tr><td>32</td><td>A PDF of your proposal will appear after the validation is complete.</td></tr>
<tr><td>33</td><td>Prior to the Submit button appearing, you must check the box agreeing to the Term of Use and LeaseAccelerator’s 1% transaction fee.


Once the box is checked, then the Submit button will appear. Click Submit to release your proposal.

</td></tr>
<tr><td>34</td><td>You will be taken to the Deal History workspace where you can see all actions you have taken thus far regarding the RFP for which you have created a proposal.</td></tr>
<tr><td>35</td><td>The Next Steps tile shows any ToDos or actions for you to perform on this deal. An LAS Staff member will review the proposal created for completeness and approve.</td></tr>
</table>

Attaching Documents

Once you have saved and submitted your proposal, you have the ability to attach documents that you would like to accompany the proposal in the Deal History workspace on the Documents tile.



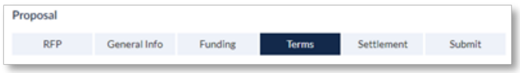
Step	Action
1	Click **Deal History** from the Left NavBar.
2	Click the **Documents** tile.
3	Click **Choose File** to select the saved file you would like to attach to your proposal and be available to the Lessee for review. 
4	Select the **Document Type** from the drop-down.
5	From the second Document Type drop-down, indicate the type of document you are attaching. If you do not see your document type in the list, select *User-attached document*.
6	Indicate the **Document #**. The Document # should begin with your company name.
7	The **Document Date** and **Capture Date** will auto-populate to the current system date, but you may change as necessary.
8	Enter any relevant Comments. This should begin with your company name, followed by the additional information you would like to enter.
9	Click **Save**.

Key Facts About the User Interface

- Your Company Name and User Name are set to store within your cookie settings for automatic placement at the login screen.

- **Do not** use the browser "back" button, to avoid application disruption and errors.

- All required proposal entry information is in Red text with an asterisk.
- The active tile a user is currently in will appear as dark blue, and light blue when inactive.



- Use the tab button on your keyboard to move from one field to the next and to exit drop-down menus.
- Make sure you allow pop-ups. If you forget, go back to the Home workspace before trying to generate PDF again.
- If the document is not a PDF file or common image format (e.g., GIF or JPG), you may be asked to save the file locally in order to open it. In some cases, you can right-click the mouse while hovering over the document number.

Version Summary

Version	Changes/ Updates	Date
22R1	Template created and guide updated	03/04/2022
22R2	Updated Documents section.	07/06/2022
22R3	Updated steps for Settlement tile, moved some screenshots.	07/26/2022