



Request for Proposal (RFP)

PureLease

Version 26.2.1



Document Information

Notices

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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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Entering a PureLease RFP

Introduction

PureLease’s Request for Proposal or RFP process leverages competition between preferred lessors, banks, vendor captives, and independents for lower rates and better terms using our Global Lessor Network. The GLN is a network of over 500 qualified equipment leasing companies in 80 countries that use our Global Lease Marketplace to provide leasing and financing proposals/bids on equipment in a competitive event. All the information that is required to enter an RFP in the user interface is gathered via transaction questionnaires, emails, phone conversations, and meetings prior to entering the details into the RFP workspace.

Our RFP process includes these basic steps:

1. Lessee provides the details for transaction.
2. RFP is created within PureLease.
3. RFP is reviewed by LA Sourcing team and shown to Lessee for final approval.
4. LA Sourcing team releases RFP to the Global Lessor Network and the appropriate Lessors receive it according to their profiles and/or the Lessees list.
5. Lessors review RFP and send responses/proposals back through the GLN which go to the LA Sourcing team.
6. LA Sourcing team reviews for completeness.

Entering an RFP

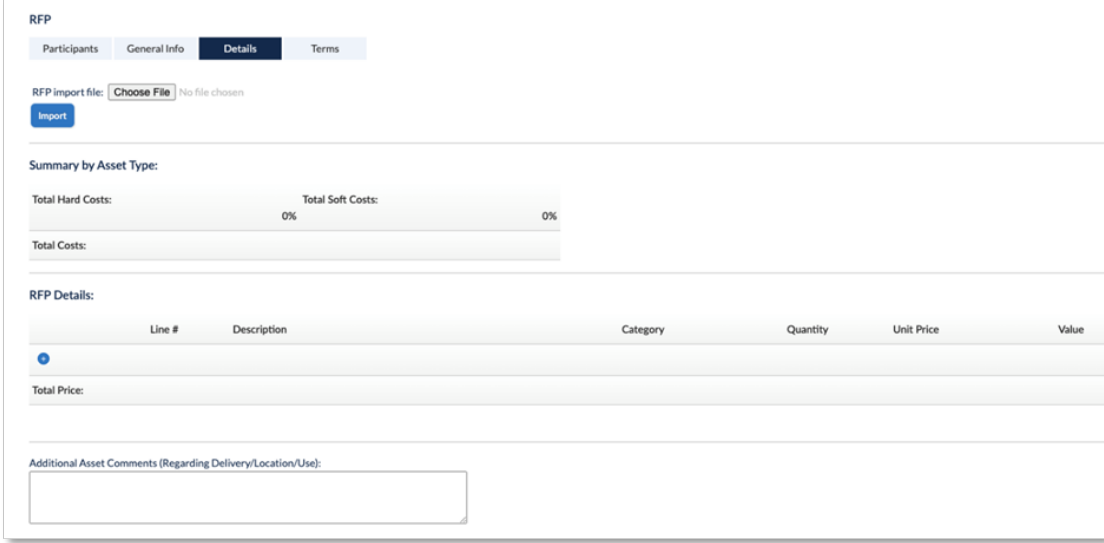
To enter an RFP, follow these steps within the user interface.

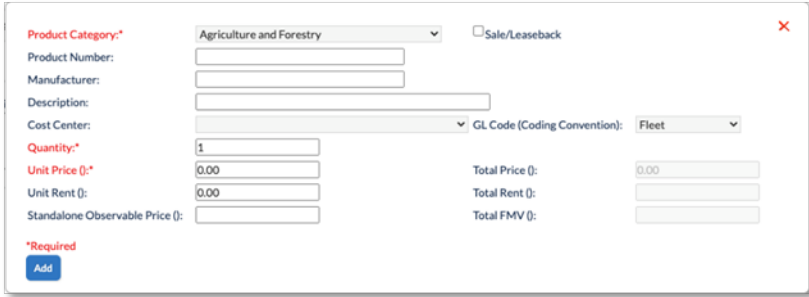
Step	Action
1	<p>If you are entering an RFP from scratch, navigate to the RFP workspace from the Left NavBar by clicking Enter RFP under the Enter Deals section.</p> <p>If you are entering an RFP after generating a Lease versus Buy Analysis, you will click the RFP button on the Analysis tile of the Lease vs Buy workspace.</p>

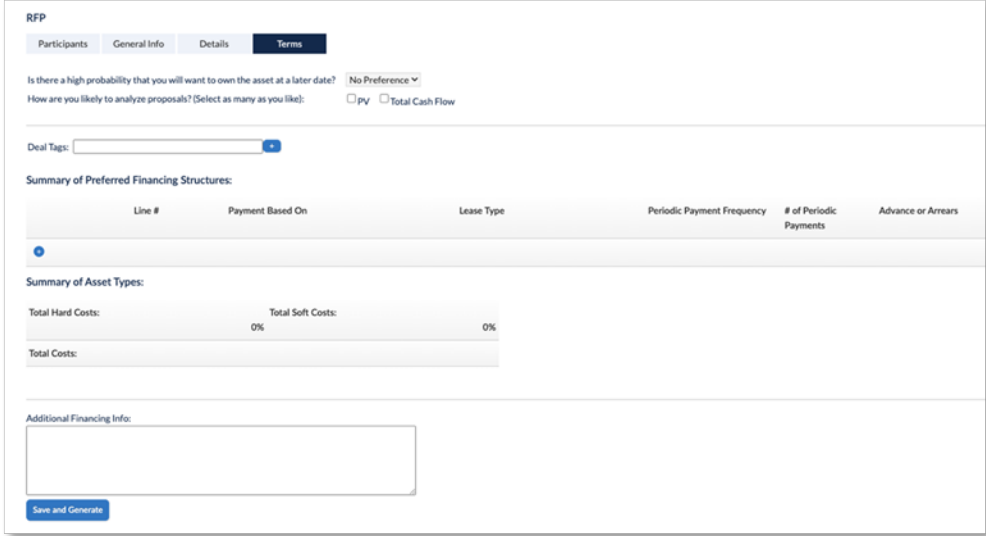


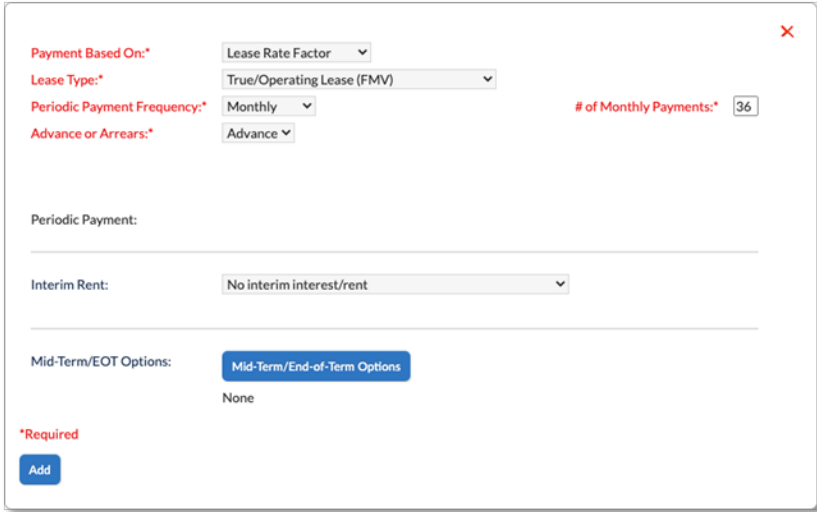
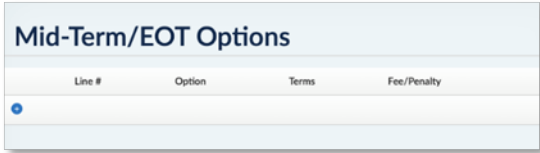
Step	Action
2	<p data-bbox="269 243 1370 338">Starting on the <i>Participants</i> tile, enter the relevant data regarding the RFP that you are about to create. Each field will have a drop-down containing names or people or companies that have been configured in your environment.</p> <div data-bbox="272 363 1110 894" style="border: 1px solid #ccc; padding: 10px;"> <p>RFP</p> <p>Participants General Info Details Terms</p> <p>BU:* <input type="text"/> + <input type="button" value="v"/> Filtered by Entity, Ship To, Analyst</p> <p>Entity:* <input type="text"/> + <input type="button" value="v"/> Filtered by BU</p> <p>Lessee:* <input type="text" value="Acme, Inc."/> + <input type="button" value="v"/></p> <p>Contact: <input type="text"/></p> <p>Address:* <input type="text" value="Reston [100 Acme Dr]"/> + <input type="button" value="v"/> Automatically selected based on Lessee</p> <p>Ship To:* <input type="text"/> + <input type="button" value="+"/> <input type="button" value="v"/></p> <p>Analyst:* <input type="text" value="Corinna Rost"/> + <input type="button" value="v"/></p> <p>Order Administrator:* <input type="text"/> + <input type="button" value="+"/> <input type="button" value="v"/> Click in selector to see suggested options.</p> <p>Vendor: <input type="text"/> + <input type="button" value="+"/> <input type="button" value="v"/> Click in selector to see suggested options.</p> <p>*Required</p> <p>Additional Company Info: <input type="text"/></p> </div> <p data-bbox="269 957 927 995">Note: Any field in red with an asterisk is required.</p> <p data-bbox="269 1037 1081 1073">Business Unit (BU): This is an internal operating and reporting group.</p> <p data-bbox="269 1089 1385 1155">Entity: Organization or company recognized as having fiduciary responsibility for the lease. This may or may not be the same company named on the contract as Lessee.</p> <p data-bbox="269 1173 1154 1207">Lessee: The legal party to the agreement or contract leasing the equipment.</p> <p data-bbox="269 1226 1284 1260">Contact & Address: The name of a specific contact person and address for the Lessee.</p> <p data-bbox="269 1276 1349 1377">Ship To: The physical location where the assets being leased will be housed or used. If there are multiple assets located in multiple locations, select the most common location here or the address of the Entity.</p> <p data-bbox="269 1396 1040 1430">Analyst: Employees responsible for generating the Lease vs. Buy.</p> <p data-bbox="269 1449 1349 1549">Order Administrator: Employees who have procurement responsibility for the leased assets, shepherding the administrative process in your organization to finance the acquisition of equipment and securing its delivery to the asset user.</p> <p data-bbox="269 1568 1333 1633">Vendor: Third party equipment manufacturer or supplier that has been selected for the RFP being created.</p> <p data-bbox="269 1652 1365 1822">Additional Company Info: <i>General information about the borrower/lessee like company information, type of industry, company ownership, fiscal year info, public/private standing, and stock/credit ratings are configured during implementation and do not need to be added here. However, if you have additional information beyond what is mentioned above and want it highlighted and brought to the attention of Lessors right away, enter it here.</i></p>

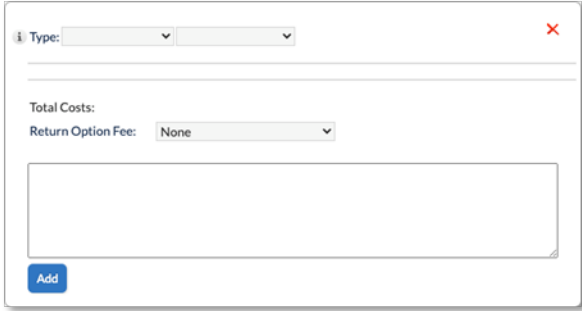
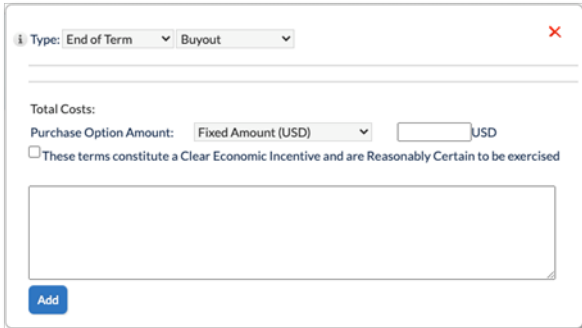
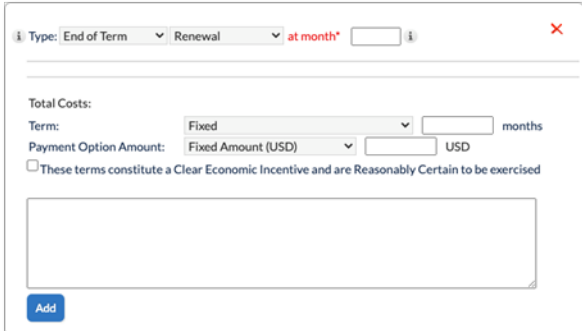
Step	Action
3	<p>Once everything is entered, move on the <i>General Info</i> tile.</p> <div data-bbox="272 296 1021 879" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>RFP</p> <p>Participants General Info Details Terms</p> <p>RFP Name:* <input type="text"/></p> <p>PO#: <input type="text"/></p> <p>Currency:* <input type="text" value="United States dollar (USD)"/></p> <p>Financing Request For: <input type="text" value="Asset Addition"/></p> <p>Response Deadline:* <input type="text" value="Jul 13 2022"/></p> <p>Expected Decision Date:* <input type="text" value="Jul 20 2022"/></p> <p>Expected Funding Date: <input type="text" value="Aug 1 2022"/></p> <p>Expected Commencement Date: <input type="text" value="Aug 1 2022"/></p> <p>Contract Preference: <input type="text" value="PureDocs"/></p> <p>Funding Requirements: <input type="text"/></p> <p>Additional Comments: <input type="text"/></p> <p><input type="checkbox"/> This RFP will be used as a lease line</p> </div> <p>RFP Name: Unique identifier for RFP. <i>Example: (Site-City-State-Equipment Type) ACME-Reston-VA-MaterialHandling1</i></p> <p>PO#: Internal Reference number that matches the customer’s ERP Procurement Purchase Order Number to the Supplier’s.</p> <p>Currency: Currency that proposal financials are transacted in.</p> <p>Financing Request For: More information regarding the equipment within the RFP. It specifies whether the equipment is for additional assets, replacement assets or existing assets (sale-leaseback).</p> <p>Response Deadline: The last date of submission of Proposals. System will auto-populate with a date two weeks from the current system date.</p> <p>Expected Decision Date: The Date on which Customer will finalize the Lessor and award RFP. System will auto-populate with a date one week after the <i>Response Deadline</i> date chosen.</p> <p>Expected Funding Date: The date on which the funds will be released. The system will auto-populate with the first day of the following month from the <i>Expected Decision Date</i>.</p> <p>Expected Commencement Date: The date which the lease will start and the term and payments begin. The system will auto-populate with the first day of the following month from the <i>Expected Decision Date</i>.</p> <p>Contract Preference: This defines the type of contract, it has a drop-down menu with four options: <i>No Preference, PureDocs, Lessee-supplied or Lessor supplied</i>.</p> <p>Funding Requirements: This is an additional information that you want the Lessors to have about the equipment and funding, like a Product List.</p> <p>Additional Comments: Anything the Lessee would like to communicate to the Lessors up front,</p>

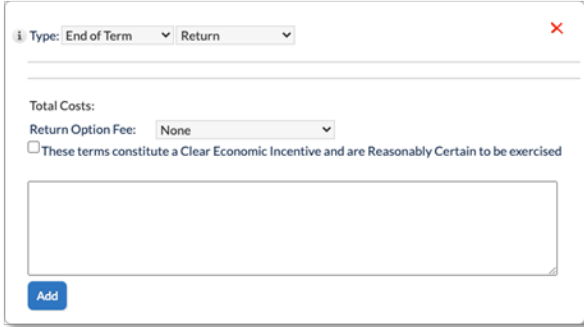
Step	Action
	such as any partner disclosures, potential assignments, etc.
4	<p>If this RFP will be used as a lease line, check the box.</p> <p>Note: An RFP with a set of Equipment to be delivered over a period of 1-2 years covered under the same Contract is considered a lease line.</p>
5	<p>Continue to the <i>Details</i> tile, where you will provide information about the equipment you wish to lease.</p> 
6	Start by clicking the plus sign .

Step	Action
7	<p>In the pop-up, populate relevant fields.</p>  <p>Product Category: Grouping of assets by type.</p> <p>Product Number: A unique identifier for assets, typically used to delineate the type of equipment in the manufacturer's product catalog.</p> <p>Manufacturer: Company name used to identify the maker of the equipment.</p> <p>Description: Description of equipment which may include model year, make, and other descriptors.</p> <p>Cost Center: Department code that an asset is assigned to for responsibility/management reporting.</p> <p>GL Code: GL Coding Convention rule-set that maps to the series of account codes where accounting transactions are recorded for this asset.</p> <p>Quantity: Number of units.</p> <p>Unit Price: Original equipment cost per unit in transactional currency, typically found on the quote from the Supplier.</p> <p>Unit Rent: A specific rental or payment amount defined in the lease agreement for the specific asset or lease component.</p> <p>Note: This is not typically used in RFPs.</p> <p>Standalone Observable Price: The price at which the Lessee would purchase the lease or non-lease component separately.</p> <p>Note: This is not typically used in RFPs.</p>
8	Click Add .

Step	Action
9	<p>Continue on to the <i>Terms</i> tile. Information entered here will explain the kind of pricing the customer is looking for.</p> 
10	<p>Select if there is a high probability that you will want to own the asset at a later date from the drop-down. This includes indicating if there will be a \$1 buyout at end of term or a fixed buyout at end of term.</p>
11	<p>Next, indicate how you are likely to analyze proposals, either by PV or Total Cash Flow.</p>
12	<p>If there is a specific Deal Tag that you want to attach to this RFP, you may indicate it here. Deal Tags must be preconfigured in your Configuration Settings in order to be selected.</p>
13	<p>Under <i>Summary of Preferred Financing Structures</i>, click the plus sign to add a new line item.</p>

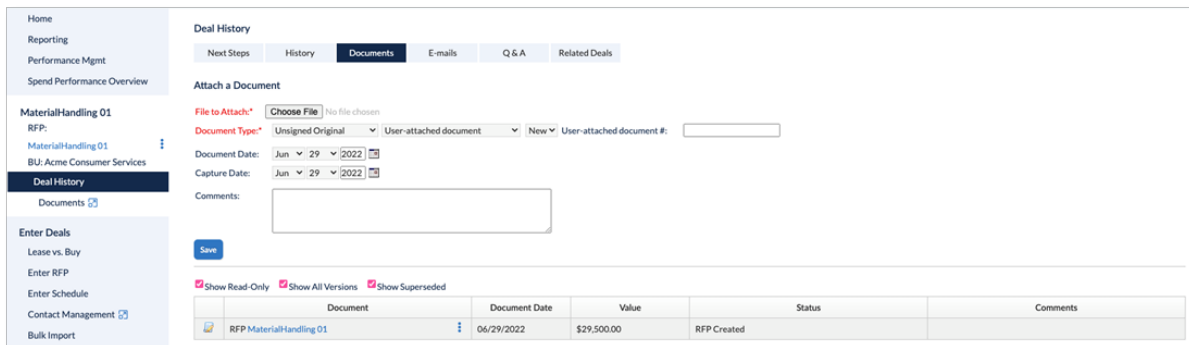
Step	Action
14	<p>In the pop-up, populate relevant fields.</p>  <p>Payment Based On: Determines how the payment is calculated. Each option enables different fields that must be populated.</p> <p>Lease Type: Type of contractual agreement.</p> <p>Periodic Payment Frequency: Periodic nature of payments.</p> <p># of Payments: Correlates to frequency and determines the term of the lease from commencement to end of original term.</p> <p>Advance or Arrears: The repayment mode which defines when a payment is made.</p> <p>Interim Rent: Any payment due prior to the lease commencement. This drop-down indicates the type and manner of which the interim rent is to be paid.</p> <p>Mid-Term/EOT Options: Indicates the options a Lessee has at the end of the original term pertaining to the equipment being leased. Options include Return, Buyout, and Renewal.</p>
15	<p>Click the Mid-Term/EOT Options button.</p> 
16	<p>Click the plus sign to add a new option.</p>

Step	Action
17	<p>In the pop-up, populate the relevant fields.</p>  <p>Type: Indicates whether the option is mid-term or end-of-term.</p> <p>Type 2: Indicates the type of option. Depending on the type of option you are entering, you may have different fields that are required to be populated.</p> <p>Note: You must select one of your options to be Reasonably Certain in order to save.</p>
18	<p>For any Mid-Term options, you will need to indicate an Effective Month, which is the month the mid-term option is available.</p>
19	<p>For End of Term <i>Buyouts</i>, populate relevant fields, then click Add.</p> 
20	<p>For End of Term <i>Renewals</i>, populate relevant fields, then click Add.</p> 

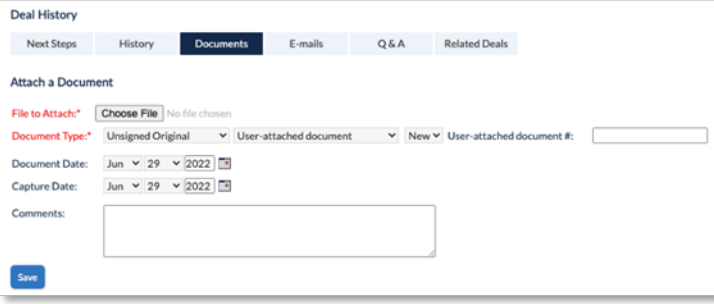
Step	Action
21	For End of Term <i>Returns</i> , populate relevant fields, then click Add . 
22	Enter additional options as necessary.
23	Click Submit when all options have been added.
24	Click Add on the <i>Financing Structure</i> pop-up.
25	Continue to add all financing structures you would like potential Lessors to provide proposals/bids on.
26	The <i>Summary of Asset Types</i> section will auto-populate based on information you entered on the <i>Details</i> tile.
27	Enter any Additional Financing Info in the box provided. This may include a recap of the terms listed above and any additional fees such as document, filing, registration, or licensing.
28	When all information has been entered, click Save and Generate .

Attaching Documents

Once the RFP has been generated, you have the ability to attach documents that you would like to release with the RFP in the Deal History workspace on the Documents tile.

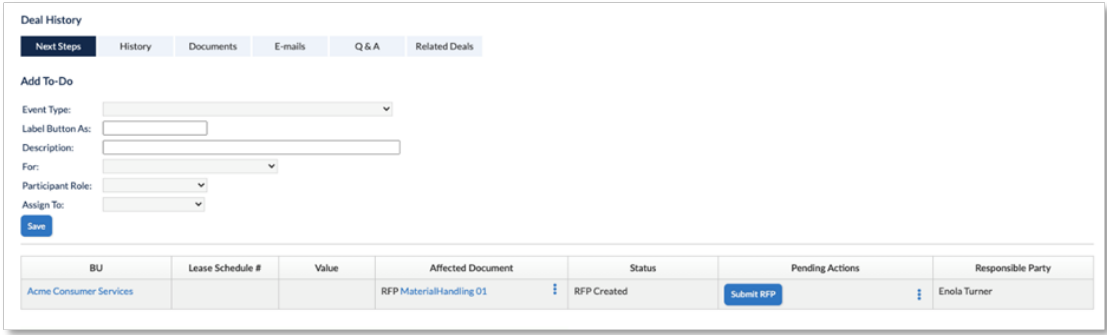
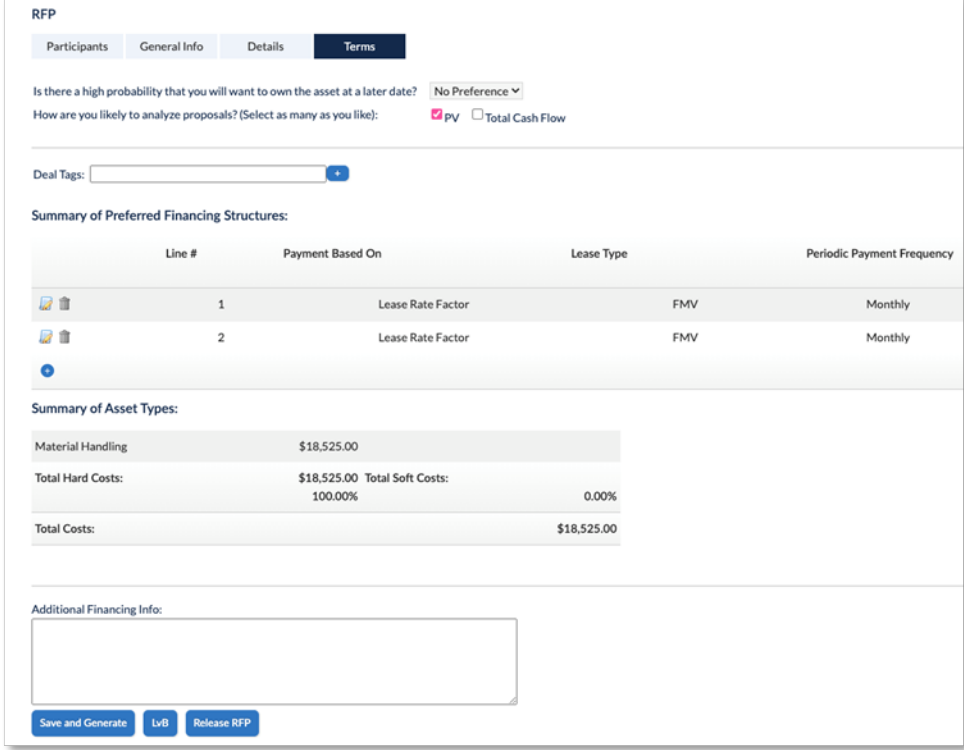


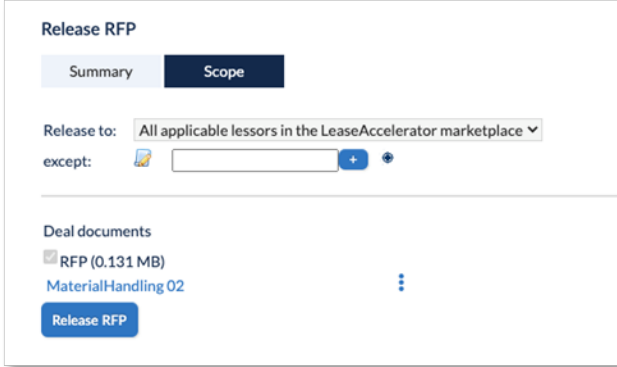
Step	Action
1	Click Deal History from the Left NavBar.
2	Click the Documents tile.

Step	Action
3	<p>Click Choose File to select the saved file you would like to attach to this RFP to be included when you release it to the Global Lessor Network.</p> 
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 <i>User-attached document</i> .
6	Indicate the Document # .
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 .
9	Click Save .

Submitting and Releasing a PureLease RFP

Once the RFP has been generated and any associated documents have been attached, it then needs to be submitted for release.

Step	Action																												
1	<p>In the <i>Deal History</i> workspace, on the Next Steps tile, click the Submit button.</p>  <p>The screenshot shows the 'Deal History' workspace with the 'Next Steps' tab selected. Below the navigation tabs is an 'Add To-Do' form with fields for Event Type, Label Button As, Description, For, Participant Role, and Assign To. Below the form is a table with columns: BU, Lease Schedule #, Value, Affected Document, Status, Pending Actions, and Responsible Party. The table contains one row for 'Acme Consumer Services' with 'RFP MaterialHandling 01' as the affected document, 'RFP Created' as the status, and 'Enola Turner' as the responsible party. A 'Submit RFP' button is visible in the Pending Actions column.</p>																												
2	<p>You'll be taken back to the RFP workspace where you can review the final RFP for accuracy and then go to the <i>Terms</i> tile.</p>																												
3	<p>Scroll to bottom and click Release RFP.</p>  <p>The screenshot shows the 'RFP' workspace with the 'Terms' tab selected. It includes a form for 'Is there a high probability that you will want to own the asset at a later date?' and 'How are you likely to analyze proposals?'. Below this is a 'Summary of Preferred Financing Structures' table:</p> <table border="1"> <thead> <tr> <th>Line #</th> <th>Payment Based On</th> <th>Lease Type</th> <th>Periodic Payment Frequency</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Lease Rate Factor</td> <td>FMV</td> <td>Monthly</td> </tr> <tr> <td>2</td> <td>Lease Rate Factor</td> <td>FMV</td> <td>Monthly</td> </tr> </tbody> </table> <p>Below the financing structures is a 'Summary of Asset Types' table:</p> <table border="1"> <tbody> <tr> <td>Material Handling</td> <td>\$18,525.00</td> <td></td> <td></td> </tr> <tr> <td>Total Hard Costs:</td> <td>\$18,525.00</td> <td>Total Soft Costs:</td> <td>0.00%</td> </tr> <tr> <td></td> <td>100.00%</td> <td></td> <td></td> </tr> <tr> <td>Total Costs:</td> <td></td> <td></td> <td>\$18,525.00</td> </tr> </tbody> </table> <p>At the bottom, there is an 'Additional Financing Info' text area and buttons for 'Save and Generate', 'LvB', and 'Release RFP'.</p>	Line #	Payment Based On	Lease Type	Periodic Payment Frequency	1	Lease Rate Factor	FMV	Monthly	2	Lease Rate Factor	FMV	Monthly	Material Handling	\$18,525.00			Total Hard Costs:	\$18,525.00	Total Soft Costs:	0.00%		100.00%			Total Costs:			\$18,525.00
Line #	Payment Based On	Lease Type	Periodic Payment Frequency																										
1	Lease Rate Factor	FMV	Monthly																										
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Material Handling	\$18,525.00																												
Total Hard Costs:	\$18,525.00	Total Soft Costs:	0.00%																										
	100.00%																												
Total Costs:			\$18,525.00																										

Step	Action
4	<p>You'll be taken to the Release RFP workspace where you will indicate which Lessors you would like this RFP to go to.</p>  <p>All applicable lessors in the PureLease marketplace: This will include any Lessor whose profile includes the parameters of your RFP, including equipment type, country, and total cost.</p> <p>Only the lessors listed below: Customer may indicate a specific Lessor or set of Lessors to send the RFP.</p>
5	<p>If you choose to send to all applicable Lessors, you may also list any Lessors you wish to exclude by typing their names in the except field. To add more than one, click the plus sign and add as many as necessary.</p> <p>Note: All Lessor names must be a member of our Global Lessor Network and must match the name they used to register exactly, or you will see the field become red and you won't be able to release the RFP. If you have questions or are unsure of the exact name, please reach out to our LA Sourcing team.</p>
6	<p>If you choose to send to only listed Lessors, you will list those specific Lessors in the restricted to field. To add more than one, click the plus sign and add as many as necessary.</p> <p>Note: All Lessor names must be a member of our Global Lessor Network and must match the name they used to register exactly, or you will see the field become red and you won't be able to release the RFP. If you have questions or are unsure of the exact name, please reach out to our LA Sourcing team.</p>
7	<p>If you have imported additional documents for this RFP and would like to include them with the RFP when released, check the boxes next to the documents.</p>
8	<p>Once all Lessor and document information is complete, click Release RFP.</p>

Approving the RFP

Once the customer has released the RFP, the LA Sourcing team will be notified to approve the RFP for actual release to the Global Lessor Network. Users will see a ToDo with the action to Approve RFP, but they will not see a button and it will be assigned to LAS Staff as the Responsible Party.

Deal History

Next Steps | History | Documents | E-mails | Q & A | Related Deals

Add To-Do

Event Type:

Label Button As:

Description:

For:

Participant Role:

Assign To:

BU	Lease Schedule #	Value	Affected Document	Status	Pending Actions	Responsible Party
Acme Consumer Services			RFP MaterialHandling 02	RFP Submitted	Approve RFP	LAS Staff

Approved RFP

If the LA Sourcing team verifies that everything is accurate and appropriate for the RFP, they will approve it and it will be released to the specified audience of Lessors. The RFP will remain open until the specified Response Deadline. You may see another ToDo on the Next Steps for LAS Staff for submitting a proposal. You may ignore this as it only applies to LAS Staff in the event they need to assist a Lessor with their proposal.

Deal History

Next Steps | History | Documents | E-mails | Q & A | Related Deals

Add To-Do

Event Type:

Label Button As:

Description:

For:

Participant Role:

Assign To:

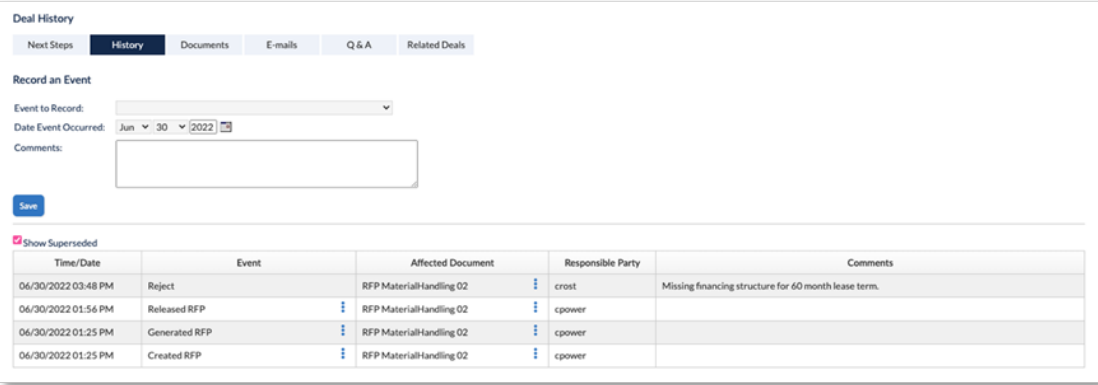
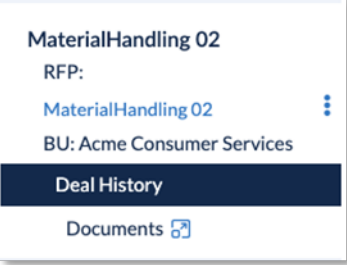
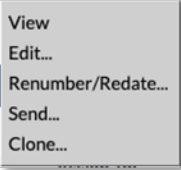
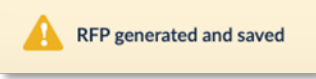
BU	Lease Schedule #	Value	Affected Document	Status	Pending Actions	Responsible Party
Acme Consumer Services			RFP MaterialHandling 01	RFP Released	Create Proposal	LAS Staff

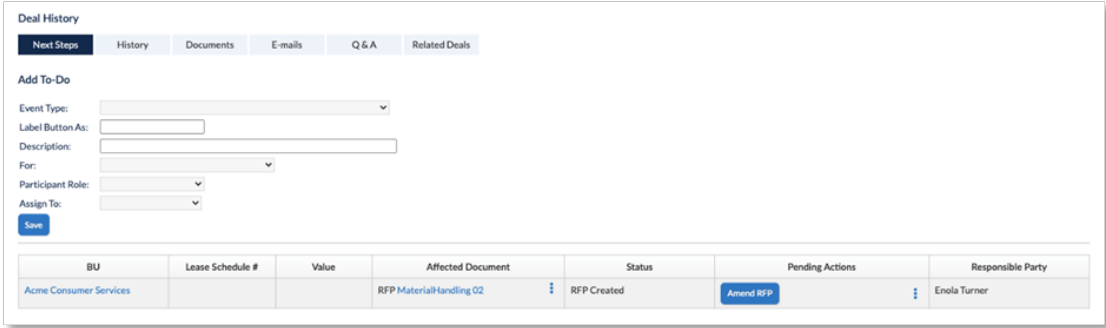
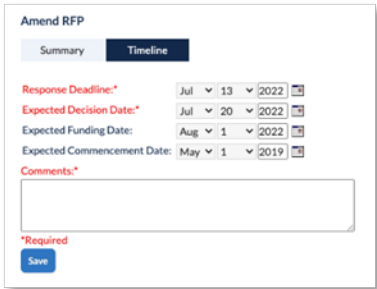
Rejected RFP

If the LA Sourcing team finds something wrong with the RFP, they will reject it and indicate in the comments what changes need to occur. This will create a new ToDo for the Order Administrator to Amend RFP. The audit history log on the History tile will include the comments added by the LA Sourcing team. There are two approaches to making changes to an RFP, depending on what changes are necessary. If you are only adjusting the dates for the RFP, you would not need to go to the RFP itself to modify these dates but rather go to the Amend RFP workspace. If, however, you need to update any of the other details of the RFP, you'll need to go to the RFP workspace to make those changes. See below for the steps for each approach.

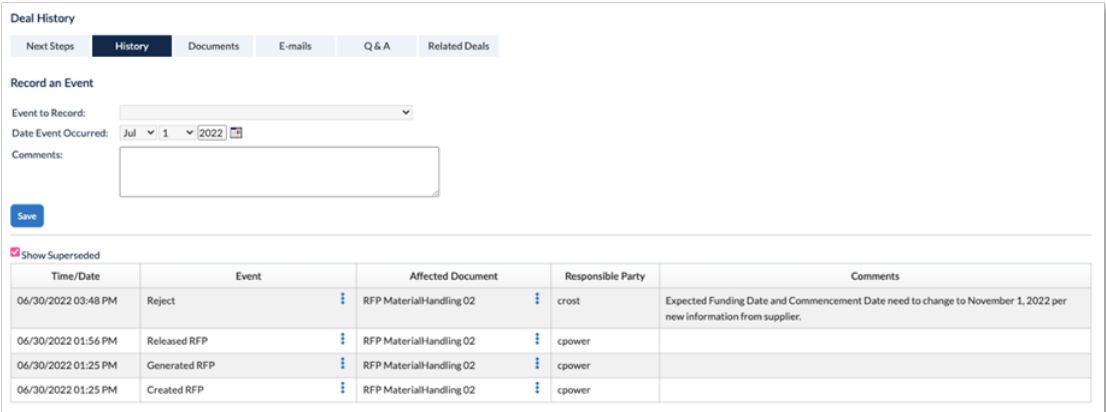
Amending an RFP for Non-date Information

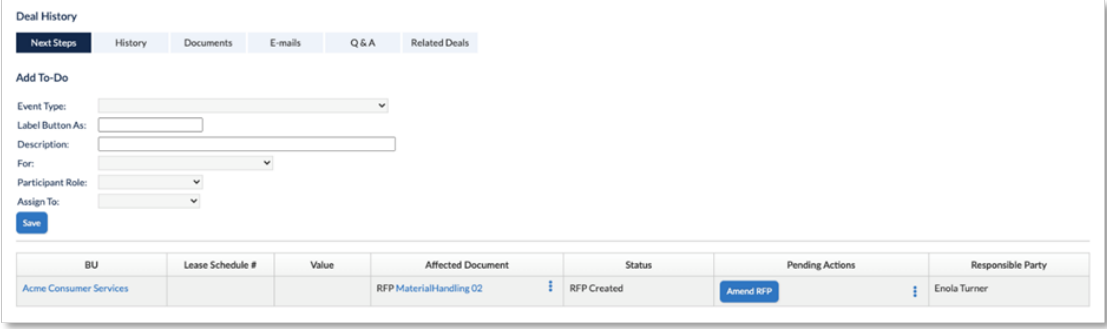
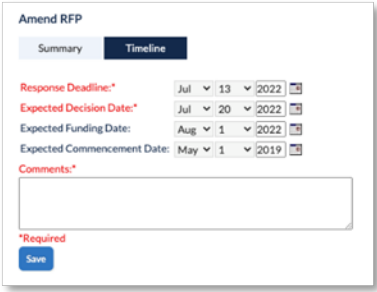
Step	Action
1	Start by identifying the corrections that need to be made to the RFP by going to the <i>History</i> tile in the <i>Deal History</i> workspace.

Step	Action																									
2	<p>In the audit history log, locate the line item for the Reject event and look at the <i>Comments</i> field.</p>  <p>The screenshot shows the 'Deal History' interface with tabs for 'Next Steps', 'History', 'Documents', 'E-mails', 'Q & A', and 'Related Deals'. Below the tabs is a 'Record an Event' section with a dropdown for 'Event to Record', a date picker for 'Date Event Occurred' (set to Jun 30, 2022), and a 'Comments' text area. A 'Save' button is below. Below that is a 'Show Superseded' checkbox and a table:</p> <table border="1"> <thead> <tr> <th>Time/Date</th> <th>Event</th> <th>Affected Document</th> <th>Responsible Party</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>06/30/2022 03:48 PM</td> <td>Reject</td> <td>RFP MaterialHandling 02</td> <td>crost</td> <td>Missing financing structure for 60 month lease term.</td> </tr> <tr> <td>06/30/2022 01:56 PM</td> <td>Released RFP</td> <td>RFP MaterialHandling 02</td> <td>cpower</td> <td></td> </tr> <tr> <td>06/30/2022 01:25 PM</td> <td>Generated RFP</td> <td>RFP MaterialHandling 02</td> <td>cpower</td> <td></td> </tr> <tr> <td>06/30/2022 01:25 PM</td> <td>Created RFP</td> <td>RFP MaterialHandling 02</td> <td>cpower</td> <td></td> </tr> </tbody> </table>	Time/Date	Event	Affected Document	Responsible Party	Comments	06/30/2022 03:48 PM	Reject	RFP MaterialHandling 02	crost	Missing financing structure for 60 month lease term.	06/30/2022 01:56 PM	Released RFP	RFP MaterialHandling 02	cpower		06/30/2022 01:25 PM	Generated RFP	RFP MaterialHandling 02	cpower		06/30/2022 01:25 PM	Created RFP	RFP MaterialHandling 02	cpower	
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3	<p>Once the corrections have been identified, navigate back to the <i>Next Steps</i> tile. If your corrections are to anything other than the date information, look to the Left NavBar and click the kebab (three dots) next to the hyperlinked RFP name.</p>  <p>The screenshot shows a navigation menu for 'MaterialHandling 02'. It includes the text 'RFP: MaterialHandling 02' with a kebab menu icon (three dots) to its right. Below this are 'BU: Acme Consumer Services', 'Deal History' (highlighted in a dark blue bar), and 'Documents' with an external link icon.</p>																									
4	<p>Select Edit from the choices in the menu.</p>  <p>The screenshot shows a context menu with the following options: 'View', 'Edit...', 'Renumber/Redate...', 'Send...', and 'Clone...'.</p>																									
5	<p>You will be taken back to the <i>RFP</i> workspace where you can update the RFP as necessary.</p>																									
6	<p>Once all changes have been completed, go to the <i>Terms</i> tile and click Save and Generate.</p>																									
7	<p>When the RFP has saved and you receive the confirmation message at the top of the workspace, navigate back to <i>Deal History</i> from the Left NavBar.</p>  <p>The screenshot shows a yellow confirmation message box with a warning icon and the text 'RFP generated and saved'.</p>																									

Step	Action
8	<p>On the <i>Next Steps</i> tile, click the Amend RFP button.</p> 
9	<p>You'll be taken to the <i>Amend RFP</i> workspace. Verify the dates are still accurate and enter relevant comments that will appear in the audit history log in <i>Deal History</i>.</p> 
10	<p>Click Save.</p>

Amending an RFP for Date Information

Step	Action
1	<p>Start by identifying the corrections that need to be made to the RFP by going to the <i>History</i> tile in the Deal History workspace.</p>
2	<p>In the audit history log, locate the line item for the <i>Reject</i> event and look at the <i>Comments</i> field.</p> 

Step	Action
3	<p>Once the corrections have been identified, navigate back to the <i>Next Steps</i> tile and click Amend RFP.</p>  <p>The screenshot shows the 'Deal History' interface with tabs for 'Next Steps', 'History', 'Documents', 'E-mails', 'Q & A', and 'Related Deals'. Under 'Add To-Do', there are fields for Event Type, Label Button As, Description, For, Participant Role, and Assign To, along with a 'Save' button. Below is a table with columns: BU, Lease Schedule #, Value, Affected Document, Status, Pending Actions, and Responsible Party. The row shows 'Acme Consumer Services', an empty field, an empty field, 'RFP MaterialHandling 02', 'RFP Created', and an 'Amend RFP' button.</p>
4	<p>You'll be taken to the <i>Amend RFP</i> workspace. Update the necessary dates and enter relevant comments that will appear in the audit history log in <i>Deal History</i>.</p>  <p>The screenshot shows the 'Amend RFP' workspace with tabs for 'Summary' and 'Timeline'. It contains four date pickers: 'Response Deadline:' (Jul 13, 2022), 'Expected Decision Date:' (Jul 20, 2022), 'Expected Funding Date:' (Aug 1, 2022), and 'Expected Commencement Date:' (May 1, 2019). There is a 'Comments:' text area and a 'Save' button.</p>
5	<p>Click Save.</p>

Once you have made all necessary updates, the LA Sourcing team will get notification to review and approve the RFP once again.

Version Summary

Version	Changes/Updates	Date
22R2	Guide created.	07/01/2022

