



Lease of IT Equipment

Supply, Installation, Commissioning, Leasing of Information Technology Equipment

Charles Darwin University Solution

Ray Fauntleroy
Manager Procurement



Criteria

1. To reduce the cost and time of processing orders and leasing documentation to allow all IT Equipment, PCs and Laptops, to be delivered, financed through a single leasing facility, and commissioned at the desktop, within 4 working days. This also includes decommissioning of old equipment.
2. To meet or exceed the conditions of the supplier Service Level Agreement.





Old Procurement and Financing Process



Old Procurement and Financing Process

11. Spreadsheet sent for finance quotes to multiple financiers

12. Finance quotes received

13. One Quote accepted

14. Invoices provided to financier

15. Proof of payment and insurance information provided

16. Financier provides documentation

17. Documentation signed and returned to financier

18. Documents executed:
University reimbursed for the cost of the equipment

up to 5 days to put out quote requests and receive quotes



New Procurement and Financing Process

1. Equipment request made

2. Supplier determined

3. Quote from supplier received

**4. Input equipment cost into online calculator
Instant finance quote – allows for budgeting pre order**

5. Equipment purchased

6. Equipment delivered and installed

7. Supplier invoices NAB

8. Financier provides documentation

9. Documentation signed and
returned to financier

10. Documents executed
NAB pays supplier



Online: Equipment Ordering: Corporate Express

Welcome, **Alex Tate**
Current Order Ref: NET10055156
Account Code: NAB8027
Username: ult-alextate
Date Created: 06-07-2007
No products on order. [View Order](#)
[Log out](#)

Charles Darwin University
Contracted Catalogue
[Click Here](#)

Product Search Track Order Number

Orders
▶ Create New Order
▶ View Current Order
▶ View Open Orders
▶ Order History
▶ Receipting

Products
▶ [Browse Products](#)
▶ Xpress Forms
▶ Frequent Orders
▶ Bulk Add
▶ Special Products

My NetXpress
▶ Settings
▶ News

Support
▶ Back Orders
▶ View Invoice
▶ User Guide
▶ FAQ
▶ Feedback
▶ Contact Us
▶ Live Support

Browse Products [Home](#) [Live Support](#) [Help?](#)

[Product Categories](#) > [Computers, Notebooks & Servers](#) > [Pc's](#)

[Add to Order](#)

6 Products All prices are exclusive of GST

Product Code	Description	Image (turn off)	Price	Unit	Unit Qty	Pk Size
87104108 N-DC7700P	Hp professional desktop bundle dc7700 cmt - new			ea	<input type="text"/>	each
87105092 N-DC7700P	Hp professional desktop bundle dc7700 cmt - region			ea	<input type="text"/>	each
87104107 R-DC7700P	Hp professional desktop bundle dc7700 cmt- replace			ea	<input type="text"/>	each
87104106 N-DC7700S	Hp standard desktop bundle dc7700 sff - new			ea	<input type="text"/>	each
87105091 N-DC7700S	Hp standard desktop bundle dc7700 sff - regional			ea	<input type="text"/>	each
87104105 R-DC7700S	Hp standard desktop bundle dc7700 sff- replacement			ea	<input type="text"/>	each

6 Products

Equipment order → equipment delivery, old equipment decommissioning, new equipment installation = 4 days

Online: NAB Financing System: Quotes - New Quote



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Quotes | Users | Logout

Add Quote Search Quotes New Quotes Saved Quotes Archived Quotes Pending Quotes

QUOTES

New Quote

Please select the type of quote you wish to add:

- Indicative**
This only allows you to request a quote for printing.
Indicative for budgeting
- Informal**
This allows you to add a quote without providing a supplier invoice number and/or a client unique identifier. These can be saved and converted to formal quotes in the future.
Formal for acceptance
- Formal**
To proceed, you are required to provide a supplier invoice number and/or a client unique identifier



Unique references for tracking

Invoice Number:	<input type="text" value="NET12345"/>	Purchase Number:	<input type="text" value="227053"/>
Invoice date:	<input type="text" value="04"/> / <input type="text" value="07"/> / <input type="text" value="07"/>	Purchase date:	<input type="text" value="04"/> / <input type="text" value="07"/> / <input type="text" value="07"/>
Term:	<input type="radio"/> 12	<input type="radio"/> 42	
	<input type="radio"/> 18	<input type="radio"/> 48	
	<input checked="" type="radio"/> 24	<input type="radio"/> 60	
	<input type="radio"/> 36		
EQUIPMENT	Equipment Cost (ex GST)		
Laptops:	<input type="text" value="15000"/>		
PCs - With Monitor:	<input type="text"/>		
PCs - No Monitor:	<input type="text"/>		
Monitor:	<input type="text"/>		
Printer:	<input type="text" value="2500"/>		
Copier:	<input type="text"/>		
Software:	<input type="text"/>		
Installation/Freight:	<input type="text"/>		
Other:	<input type="text" value="250"/>		
	<input type="button" value="Go to Next Step"/>		

**Various Terms
eg. 3 year or 4 years**

**Various Assets to finance
Customisable to suit needs**



Invoice Number: NET12345
Invoice Date: 04 Jul 07
Terms: 24

Purchase Num
Purchase Dat

Calculator shows monthly rental based on asset type

EQUIPMENT COST:

Laptops \$15,000.00
PCs - With Monitor
PCs - No Monitor
Monitor
Printer \$2,500.00
Copier
Software
Installation/Freight
Other \$250.00

MONTHLY NET RENTAL:

Laptops \$585.16
PCs - With Monitor
PCs - No Monitor
Monitor
Printer \$100.40
Copier
Software
Installation/Freight
Other \$11.38

Net Monthly Rental: \$696.94
Stamp Duty: \$12.54
GST: \$70.95

Save for later

TOTAL MONTHLY RENTAL: \$780.43

Total monthly rental



QUOTES

Quote Detail

QuoteID: 113
Added By: test02
Status: Pending
Net Rental: 679.04
Stamp: 5.09
Invoice Number: 0002
Invoice Date: 04 Jul 07
Purchase Number: 0002
Purchase Date: 04 Jul 07
Term: 24
Date Added: Thu - 05 Jul, 07 - 12:13:14
Date Updated:

[Approve Quote](#)

Costs

Equipment	Cost	Monthly Net Rental
Laptops	15000.00	569.96
Printer	2500.00	97.92
Other	250.00	11.16

Quote must be approved by management prior to NAB receiving notification user access levels as required

NAB Financing System: Quotes – Quote Approval



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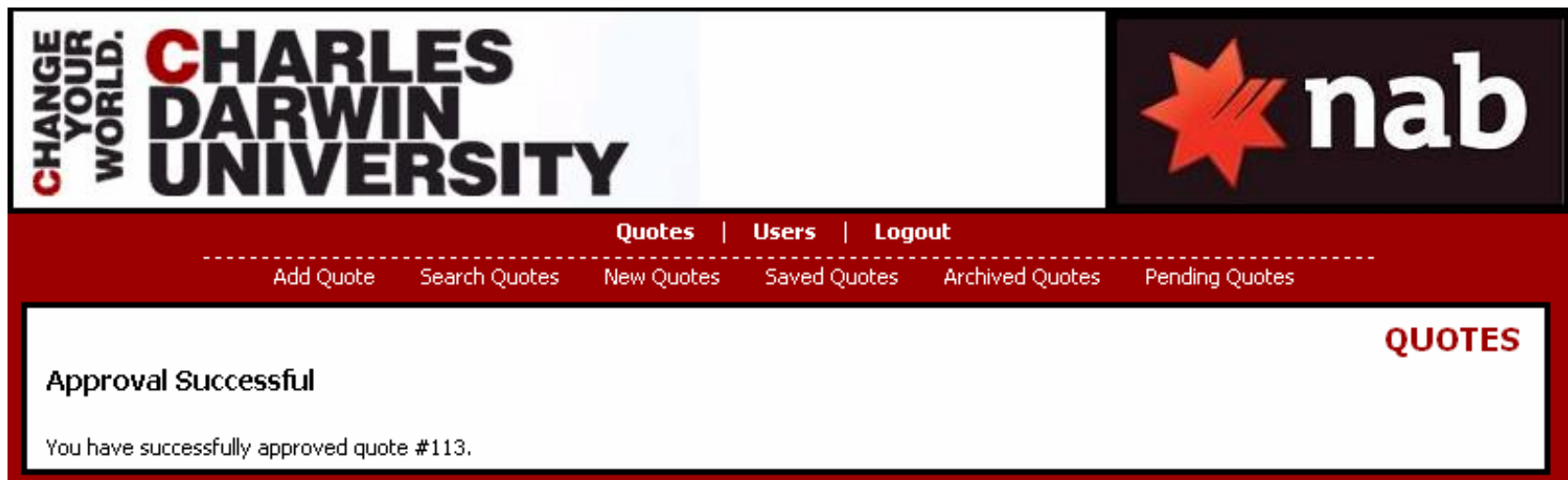
[Add Quote](#) [Search Quotes](#) [New Quotes](#) [Saved Quotes](#) [Archived Quotes](#) [Pending Quotes](#)

QUOTES

Confirm Approval

You are about to approve quote #113. Do you wish to continue?

NAB Financing System: Quotes – Quote Acceptance



The screenshot displays the NAB Financing System interface. At the top left, the Charles Darwin University logo is visible with the tagline "CHANGE YOUR WORLD." and "CHARLES DARWIN UNIVERSITY". To the right is the NAB logo, featuring a red star and the text "nab". Below the logos is a navigation menu with the following items: "Quotes", "Users", and "Logout". Underneath this menu, a dashed line separates a row of links: "Add Quote", "Search Quotes", "New Quotes", "Saved Quotes", "Archived Quotes", and "Pending Quotes". The main content area is a white box with a red border. On the right side of this box, the word "QUOTES" is written in red. The main text in the box reads: "Approval Successful" followed by "You have successfully approved quote #113."

- Email confirmation sent to department that added quote
- NAB receive notification of quote/financing requirement



NAB Financing System: Quotes – Document Production

Tax Invoice
Equipment Schedule - Rental Agreement

To: Contract No:

From:
(Name, and address of Customer)

offers to rent on the terms of the **Master Rental Agreement** between the Customer / Renter and Solutions Leasing Pty Limited ABN 18 108 925 417 as agent for National Australia Bank Limited ABN 12 004 044 937 dated / / , and this Equipment Schedule, the goods described below

Item 1 Customer / Renter

Name:

A.C.N. or A.B.N. or A.R.B.N.

Address:

If Customer is a trustee the details are noted in Part A the Details of the Master Rental Agreement

Item 2 Address for Payments and Services of Notices

The address of Solutions Leasing Pty Limited for payments and service of notices is set out above.

Item 3 Initial Term/Commencement of Term

36 months from / /

Item 4 Goods



Description

Other Goods	Description:	New IT EQUIPMENT - REFER TO INVOICES SUPPLIED
	Serial No:	VARIOUS
	Identification No:	VARIOUS
	Regular Location:	AUSTRALIAN WEALTH MANAGEMENT

- The system is set up to produce a document off a quote
- CDU process is to accumulate all quotes throughout one month and “bundle” them into terms, to produce one document:
 - 1 x 24 month contract
 - 1 x 36 month contract
 - 1 x 48 month contract
- Customisable as required

NAB Financing System: Quotes – Quotes List





[Quotes](#) | [Users](#) | [Logout](#)

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QUOTES

List of New Quotes

ID	Invoice Number	Purchase Number	Date Added:
111	net1234	227053	05 Jul 07
112	0001	0001	05 Jul 07
113	0002	0002	05 Jul 07

NAB Financing System: Users – Add User



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[Quotes](#) | [Users](#) | [Logout](#)

[Active Users](#) [Search Users](#) [Add User](#)

USERS

Add User

UserID: *

First Name: *

Last Name: *

Password: *

Confirm Password: *

Privilege: *
 *
 *
 *

Email: *

Phone:



Mobile:

**Management (authorising)
or
Staff (quoting / processing)
levels of access available**



NAB Financing System: Users List





[Quotes](#) | [Users](#) | [Logout](#)

[Active Users](#) [Search Users](#) [Add User](#)

USERS

Users

LIST OF ACTIVE USERS

ID	Name	Email	Privilege	
Alex Tate	Alex Tate	alex.tate@cdu.edu.au	Procurement Staff	Edit
helen.mearns	Helen Mearns	helen.mearns@cdu.edu.au	Procurement Staff	Edit
mick.lihou	Mick Lihou	Mick.Lihou@cdu.edu.au	Procurement Staff	Edit
ray.fauntleroy	Ray Fauntleroy	ray.fauntleroy@cdu.edu.au	Procurement Manager	Edit





How did we do it?

Tender process → Financier Selected → NAB

**NAB customised online calculator and Approval System:
Available on a 24/7 basis to meet our exact needs**

