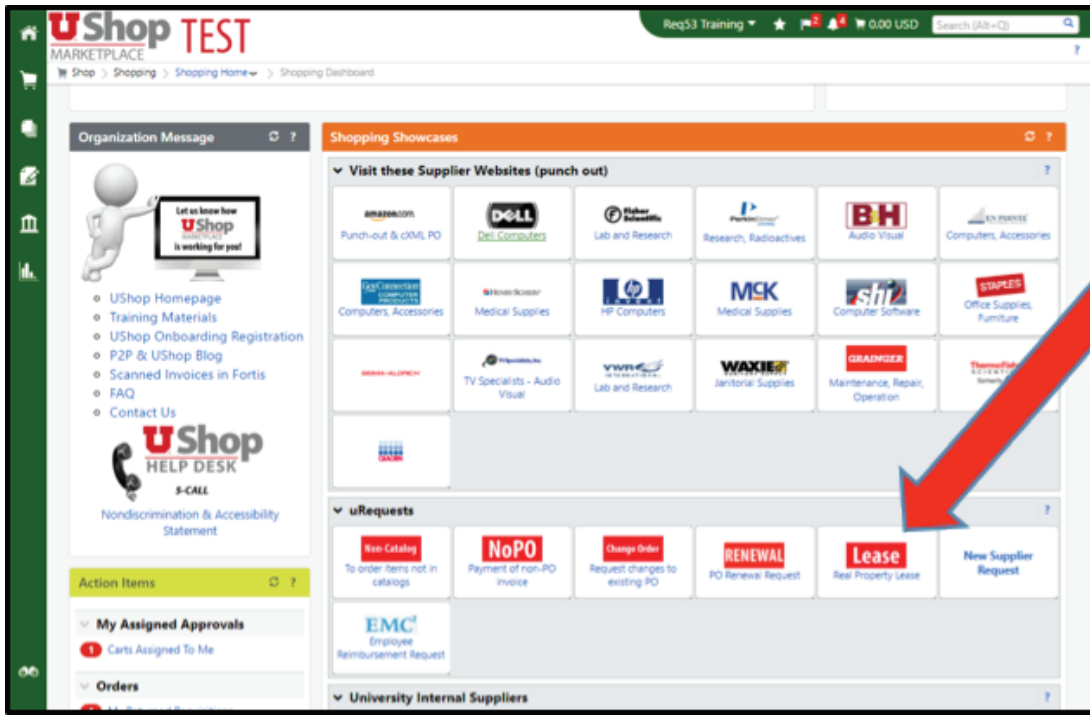


1. Click on the Lease tile



2. Once you select/click the Lease tile on the UShop dashboard the real property lease form is launched:

Real Property Lease Recurring Payment Request - Mozilla Firefox

https://usertest.sciquest.com/apps/Router/FavoritesFormEdit?FavoriteProductId=161190&wantReloadOnClose=161190&FavPageContext=2&trmstp=1473876305925985

**Real Property Lease Recurring Payment Request** Available Actions: Add and go to Cart Go Close

**Purchasing Dept.**  
Financial & Business Services  
**University of Utah**  
1901 E South Campus Dr, Room 151  
Salt Lake City, UT 84112  
(801) 581-7241  
askme@purchasing.utah.edu

**Real Property Lease Recurring Payment Request**

- Use this form to request a purchase order for a real property lease.
- This request will facilitate recurring, monthly payments made to the supplier/landlord on a regularly scheduled payment date throughout the year.
- Payments will be made either on or before the first of each month.

Purchasing Dept. Use Only	Lease Information
Commodity Code: <input type="text" value="80131500"/>	Department Contact Name: <input type="text"/>
Purchasing Reference: <input type="text"/>	Department Contact Phone Number: <input type="text"/>
New PO Number: <input type="text"/>	Ship-to Code: <input type="text"/>
	Previous PO number associated with this lease (if new lease, enter New.): <input type="text"/>
	Lease ID Code: <input type="text"/>

Supplier Information	Lease Description
<p>Please search for your supplier using the box below. If your supplier is not yet available in UShop, type "New Supplier" in the <b>Enter Supplier</b> box below, and fill in the <b>New Supplier Details</b> section. You may search for existing PeopleSoft vendors using the <b>Vendor Search</b> web app available in CIS.</p> <p>Enter Supplier: <input type="text"/></p> <p>OR Supplier Search</p> <p><b>PO Dispatch</b> The system will distribute purchase orders using the method(s) indicated below: Custom Supplier Distribution selected Email (HTML Attachment): noreply@utah.edu</p> <p><b>New Supplier Details</b> Supplier Name: <input type="text"/></p> <p>If you have contact information for the supplier, you may enter it below. This helps the Supplier Enablement Team in processing your request.</p>	<p>Enter the monthly amounts for each lease item below. If not applicable, leave blank. The <b>Total Lease Payment</b> will be the amount the PO is created for, along with any amount in the <b>Lump Sum Payment</b>.</p> <p><b>Product Description</b> <input type="text"/> 254 characters remaining expand   clear</p> <p><b>Property Location (address)</b> <input type="text"/> 500 characters remaining expand   clear</p> <p>Monthly Base Rent: <input type="text"/></p> <p>Monthly CAM (Common Area Maintenance): <input type="text"/></p> <p>Monthly Internet Fees: <input type="text"/></p> <p>Monthly Phone Fees: <input type="text"/></p>

3. Begin by entering your supplier (leasing company or landlord) in the field titled Enter Supplier.

This field has an auto-populate feature where all you have to do is enter the first few letters of your supplier name and the system will begin to fill in the rest:

The screenshot shows the 'Supplier Information' form. At the top, there is a header 'Supplier Information' with a question mark icon. Below the header is a red instruction: 'Please search for your supplier using the box below. If your supplier is not yet available in UShop, select "New Supplier." Fill in the **New Supplier Details** section. You may search for existing PeopleSoft vendors using the [Vendor Search](#) web app available in CIS.' To the right of this instruction is a red note: 'Fill in the pr required.' Below the instruction is a section titled 'Supplier' with a sub-section 'Enter Supplier' containing a text input field with 'inter' typed in. A dropdown menu is open below the input field, listing several supplier names with green up arrows and red question marks: SEARS, INTERCHIM INC, INTERIOR ALLIANCE LLC, INTERIORS WEST LLC, INTERMOUNTAIN BOILER CO, INTERMOUNTAIN BUSINESS FORMS / INTERFORM, INTERMOUNTAIN DONOR SERVICES, INTERMOUNTAIN FARMERS ASSOC, and INTERMOUNTAIN FUSE SUPPLY INC. To the left of the dropdown, there are sections for 'PO Dispatch' (Manual) and 'New Supplier Details:' with a 'Supplier Name' input field.

**NOTE: ALL FIELDS IN BOLD ARE REQUIRED**

4. If your supplier (leasing company or landlord) is not in UShop then enter "New Supplier" in the field as a temporary place holder so you can proceed. In order to have your supplier added to the UShop database please add as much of your supplier detail as you can into the "New Supplier Details" fields provided.

The screenshot shows the 'Supplier Information' form. At the top, there is a header 'Supplier Information' with a question mark icon. Below the header is a red instruction: 'Please search for your supplier using the box below. If your supplier is not yet available in UShop, select "New Supplier." Fill in the **New Supplier Details** section. You may search for existing PeopleSoft vendors using the [Vendor Search](#) web app available in CIS.' Below the instruction is a section titled 'Enter Supplier' with a text input field containing 'new'. A dropdown menu is open below the input field, showing 'New Supplier' and 'NEWARK CORPORATION'. Below the dropdown is a section titled 'PO Dispatch' with a sub-section 'The system will distribute purchase orders using the method(s) indicated below:' and a radio button selected for 'Custom Supplier Distribution'. Below this is an email address field: 'Email (HTML Attachment): noreply@utah.edu'. Below the email address is a section titled 'New Supplier Details' with a 'Supplier Name' input field. Below the 'Supplier Name' field is a red note: 'If you have contact information for the supplier, you may enter it below. This helps the Supplier Enablement Team in processing your request.' Below the note are three input fields: 'Contact Name and/or Phone Number', 'Supplier Email Address or Fax Number', and 'Supplier Address'. At the bottom of the form, there is a character count: '1000 characters remaining' and two buttons: 'expand' and 'clear'. Two large red arrows point from the right side of the form towards the 'New Supplier Details' section.

5. Enter your lease information into the fields provided in the Lease Information section of the form:

The screenshot shows a web browser window with the URL `&FavPageContext=2&tmstmp=1473876305925985`. The page title is "Property Lease Recurring Payment Request". Below the title, there is a section for "Lease Information" with the following fields:

- Department Contact Name
- Department Contact Phone Number
- Ship-to Code
- Previous PO number associated with this lease (If new lease, enter New.)
- Lease ID Code

**Please Fill in:**

- Your Department Contact Name & Phone Number
- Your Department Ship To Code
- Previous PO Number – If known, this helps create a point of reference for historical purposes.
- Lease ID Code - This is the code that prints on the check so that the landlord/leasing company knows where or which property to apply the funds. It is very important to have this reference code such that late fees are not assessed to your account.

6. Enter your lease details into the fields provided in the Lease Description section of the form:

The screenshot shows a web browser window with the URL `&FavPageContext=2&tmstmp=1473876305925985`. The page title is "Lease Description". Below the title, there is a section for "Lease Description" with the following fields:

- Product Description (254 characters remaining, expand | clear)
- Property Location (address) (500 characters remaining, expand | clear)
- Monthly Base Rent
- Monthly CAM (Common Area Maintenance)
- Monthly Internet Fees
- Monthly Phone Fees
- Monthly Utility Fees
- Total Monthly Lease Amount (Total lease payments & fees for one month period)
- Number of Months
- Total Lease Payment (Total monthly lease amount x Number of months)
- Lump Sum Payment (Total past due rent payments, late fees, etc. for immediate payment to landlord.)
- Additional Details (254 characters remaining, expand | clear)
- Lease Start Date (mm/dd/yyyy)
- Lease End Date

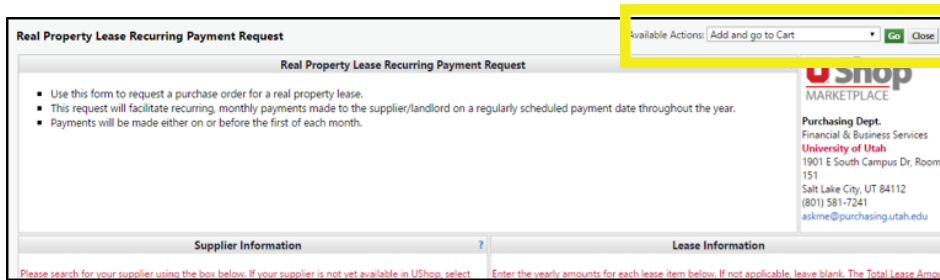
**Please Fill In:**

- Product Description - Gross amount of the lease for one (1) month including all applicable fees and the period of time in which it will be paid.

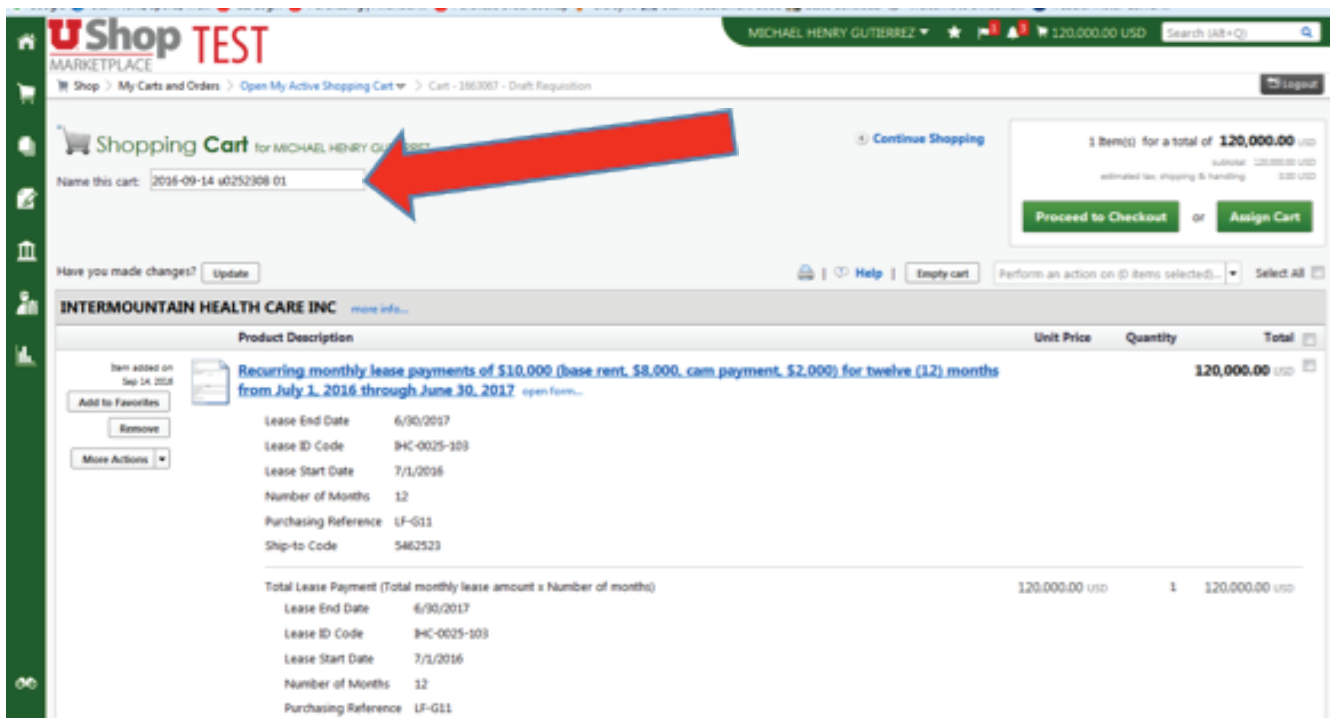
Example: "Recurring monthly lease payments of \$10,000 (base rent, \$8,000, cam payment, \$2,000) for twelve (12) months from July 1, 2016 through June 30, 2017"

- Property Location - enter the address of the leased property
- Base Rent, CAM, Internet Fees, etc. - enter the known amounts if applicable
- Total Monthly Lease Amount – Total Base Rent & Fees for one (1) month. ( i.e. \$10,000 in the example above)
- Number Of Months – Number of Months in current lease term. (i.e. 12 in the example above)
- Total Lease Payment – "Total Monthly Lease Amount" multiplied by "Number of Months." (i.e. \$120,000 in the example above)
- Lump Sum Payment – Enter past due rent payments, late fees or other fees that need to be paid immediately to the landlord/leasing company.
- Lease Start Date & Lease End Date  
Example; if you have a five (5) year lease enter the dates a - START 07/01/2016, END 06/30/2021

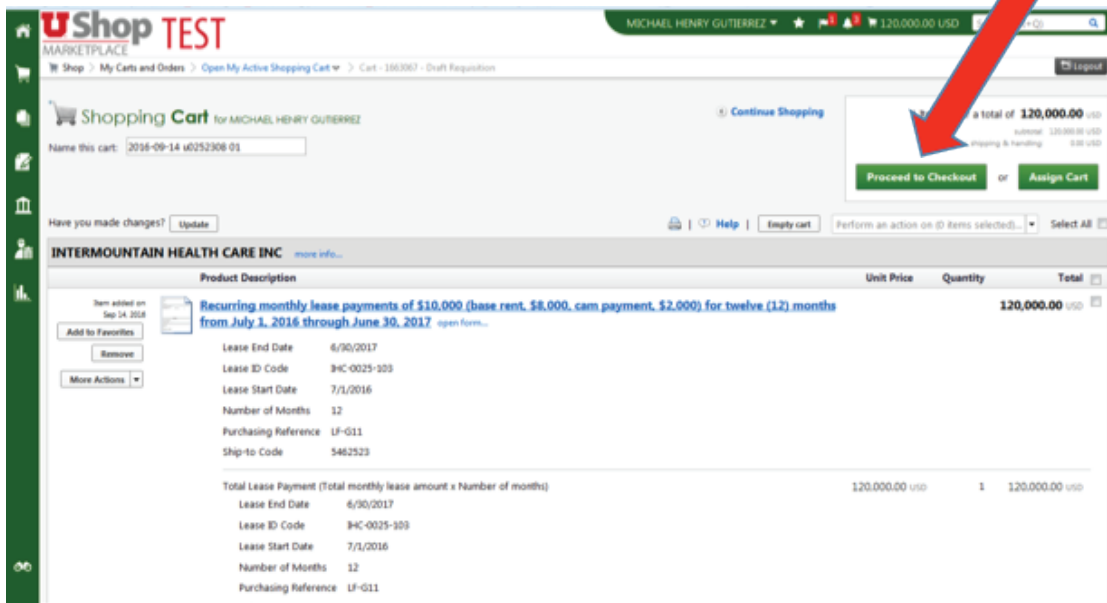
7. Once you have completed filling out the form scroll to the top of the form and select/click "GO"



Once you have clicked "GO" your cart will display. You can name your cart should you choose to as a means of organizing your property leases:

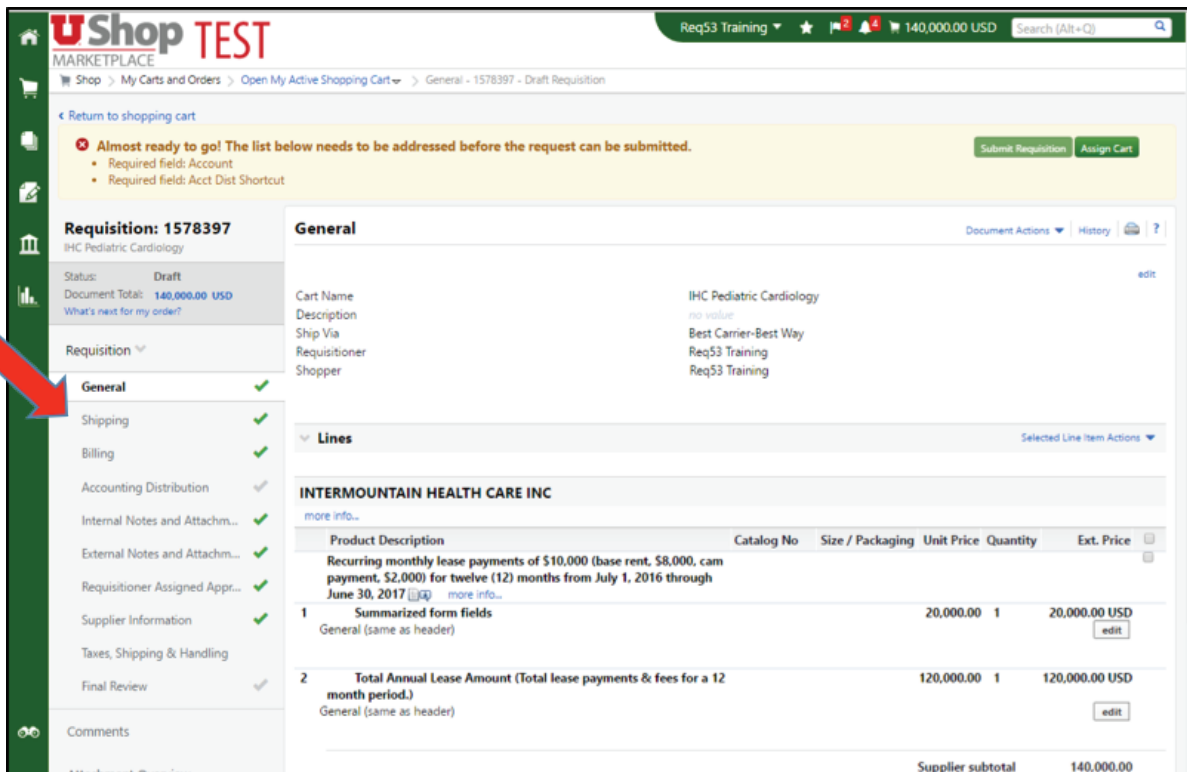


## 8. Select Proceed to Checkout

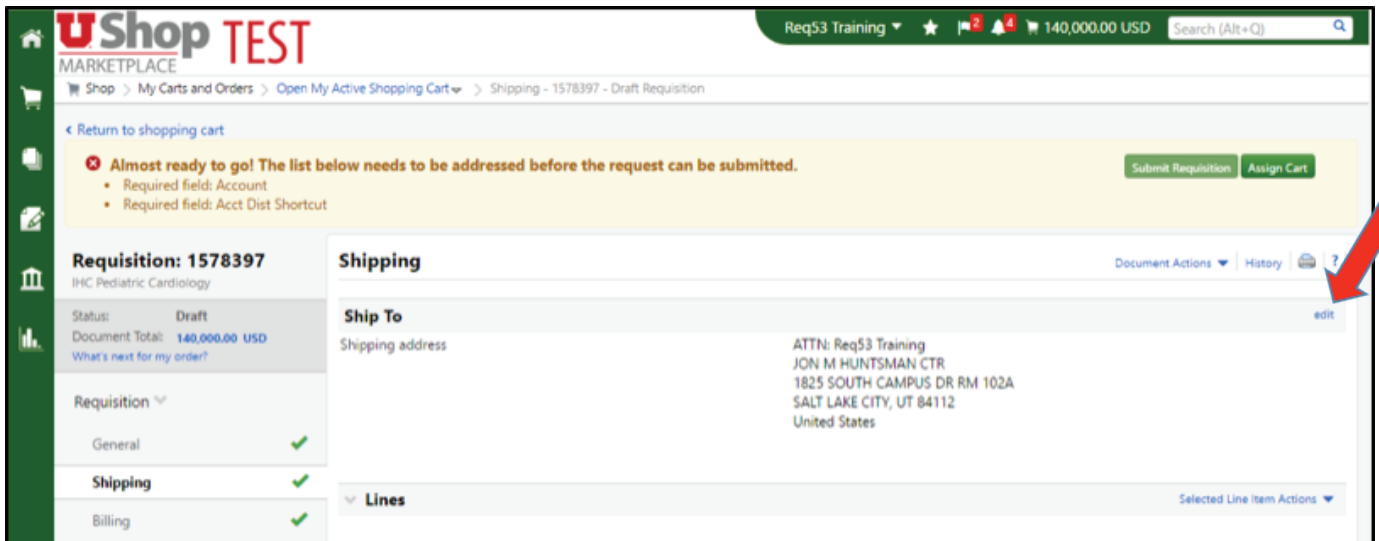


## 9. Select Ship To Address

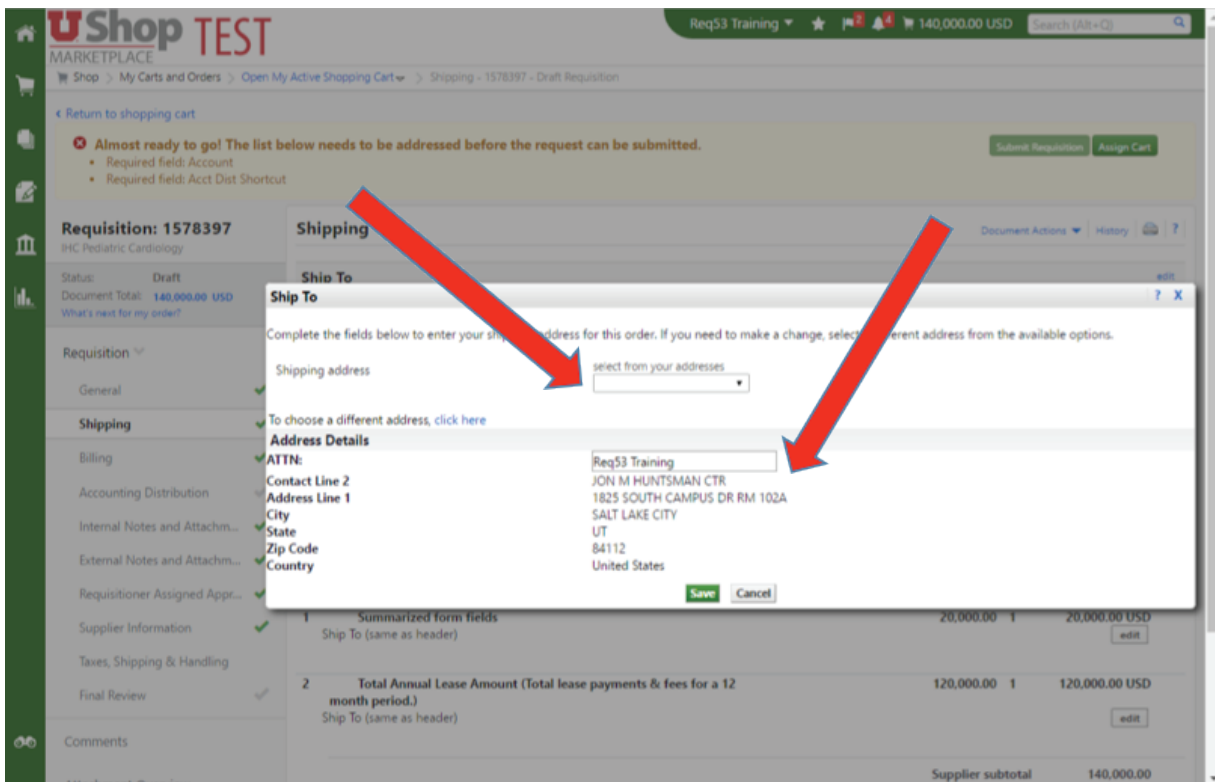
Once you have selected "Proceed to Checkout" the requisition home page will display. On the left hand side of the interface, select/click on the word Shipping to select your ship-to address. This is a required element even though we are not physically shipping anything to your leased property:



Once you have selected Shipping click or select the “edit” hot link in order to select your ship-to address:



While in “edit” mode you can use the drop down menu to select addresses from previous orders you have placed or you can choose alternate ship-to addresses from the selection menu. Once you have completed your selection click or select Save.



## 10. Select Accounting Distribution (Chart Fields)

The next field you need to populate is your accounting distribution or as they are collectively known, the chart fields. On the left hand side of the interface, select/click on the word Accounting Distribution, then “edit” to enter your information to select your chart field codes:

The screenshot shows the UShop TEST interface for requisition 1578397. The left sidebar has 'Accounting Distribution' highlighted. The main area shows a table with columns: Acct Dist Shortcut, BU, Org, Fund, Activity, Project, Account, and A/U. The 'Account' and 'A/U' fields are marked as 'Required field'. A red arrow points to the 'edit' button in the top right corner of the table.

The following field is displayed:

The screenshot shows the 'Accounting Distribution' dialog box. It has fields for Acct Dist Shortcut, BU, Org, Fund, Activity, Project, Account, and A/U. The 'Account' field is marked as 'Required field'. Red arrows point to the 'Account' and 'A/U' fields, and the 'Save' button.

The first field is called the “Accounting Distribution Shortcut.” The field requires either a Project code or an Activity code and once the code is entered simply tab over to the “Account field.” Enter a “1” or “0” in the A/U field if you have used an Activity code; leave the A/U field empty if you have used a Project code.

Once all values have been populated, click / select the "recalculate/validate values" link. Your chart fields will then populate:

**Accounting Distribution**

Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
10455 Select from all values... Required field	01 Select from all values... Clear selected value...	00238 Select from all values... Clear selected value...	2000 Select from all values... Clear selected value...	10455 Select from all values... Clear selected value...	no value Clear selected value...	65502 Select from all values... Required field	1 Select from all values...

[recalculate / validate values](#)

Click Save to proceed - You will note that in the left hand portion of the interface all of the required elements for your requisition have a green check mark indicating your order is ready to be placed:

**UShop TEST MARKETPLACE**

Req3 Training | 140,000.00 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Accounting Distribution - 1578397 - Draft Requisition

Return to shopping cart

This order is ready to be placed.

**Requisition: 1578397**  
IHC Pediatric Cardiology

Status: Draft  
Document Total: 140,000.00 USD  
What's new for my order?

- Requisition
- General
- Shipping
- Billing
- Accounting Distribution
- Internal Notes and Attachm...
- External Notes and Attachm...
- Requisitioner Assigned Appr...
- Supplier Information
- Taxes, Shipping & Handling
- Final Review
- Comments
- Attachment Overview

**Accounting Distribution**

Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
10455 IRON MISSION DIALYSIS CENTER	01 UNIVERSITY CAMPUS	00238 DIALYSIS-UTAH	2000 DEPARTMENTAL OPERATING	10455 IRON MISSION DIALYSIS CENTER	no value	65502 SPACE RENTAL	1 ALLOWABLE

**Lines**

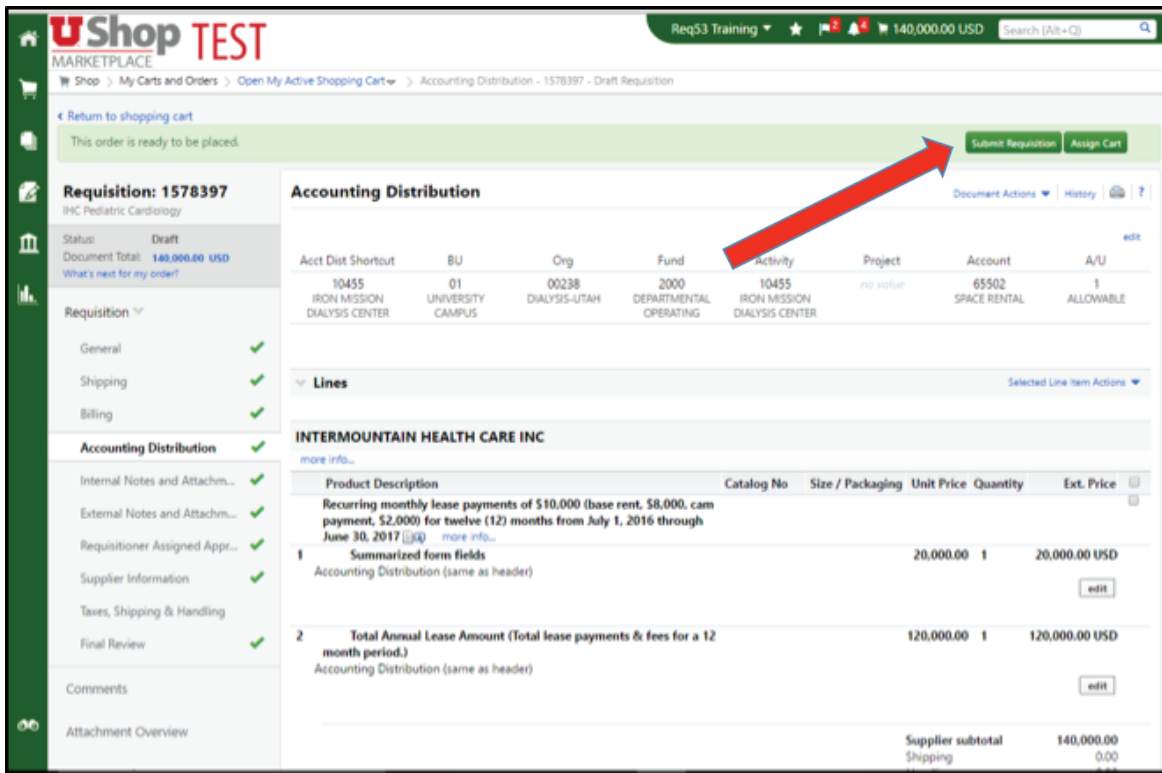
**INTERMOUNTAIN HEALTH CARE INC**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Recurring monthly lease payments of \$10,000 (base rent, \$8,000, cam payment, \$2,000) for twelve (12) months from July 1, 2016 through June 30, 2017			20,000.00	1	20,000.00 USD
Summarized form fields					
Accounting Distribution (same as header)					
Total Annual Lease Amount (Total lease payments & fees for a 12 month period.)			120,000.00	1	120,000.00 USD
Accounting Distribution (same as header)					
Supplier subtotal					140,000.00



## 11. Submit Requisition

Once you have completed reviewing your requisition for accuracy, click/select the "Submit Requisition" button near the top right hand side of the interface:



The screenshot shows the UShop TEST interface for a requisition. The top navigation bar includes "Req53 Training" and a search bar. The main content area displays the requisition details for "Requisition: 1578397" under the heading "Accounting Distribution". A red arrow points to the "Submit Requisition" button in the top right corner. The requisition is currently in "Draft" status with a total value of 140,000.00 USD. The accounting distribution table shows the following details:

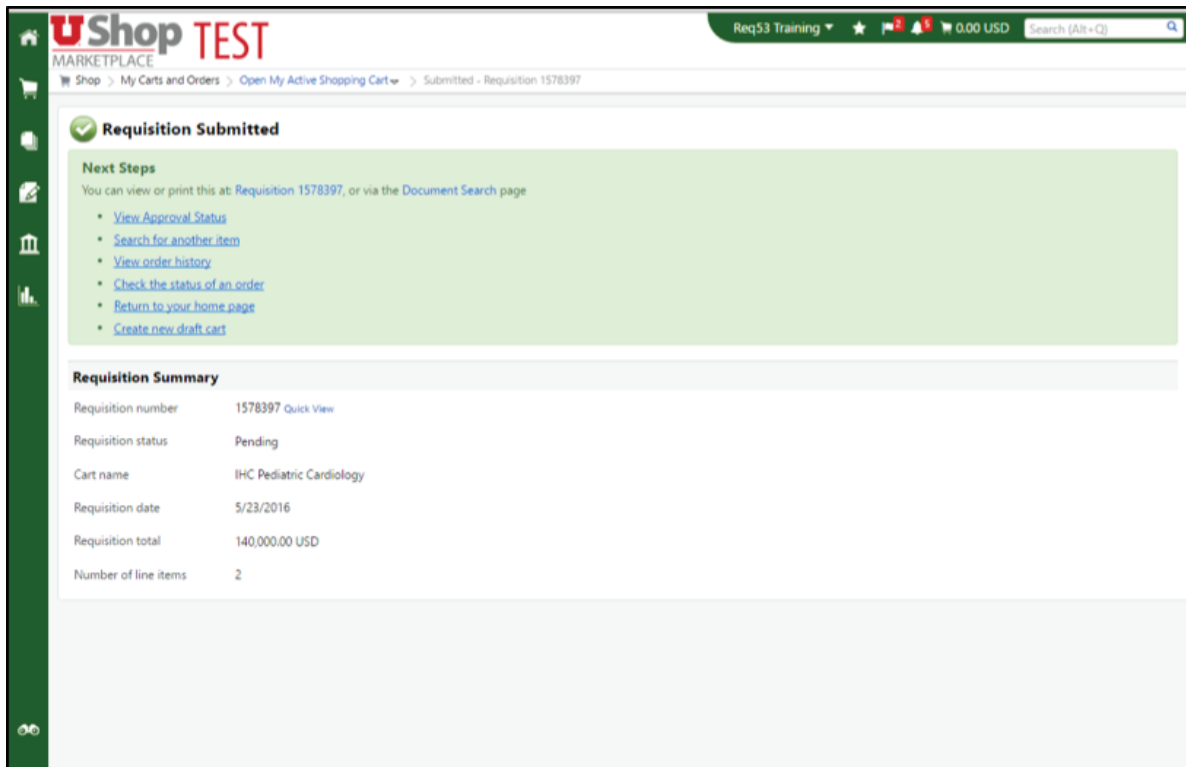
Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
10455 IRON MISSION DIALYSIS CENTER	01 UNIVERSITY CAMPUS	00238 DIALYSIS-UTAH	2000 DEPARTMENTAL OPERATING	10455 IRON MISSION DIALYSIS CENTER	no value	65502 SPACE RENTAL	1 ALLOWABLE

Below the accounting distribution, there are two line items for "INTERMOUNTAIN HEALTH CARE INC":

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Summarized form fields Accounting Distribution (same as header)			20,000.00	1	20,000.00 USD
2 Total Annual Lease Amount (Total lease payments & fees for a 12 month period.) Accounting Distribution (same as header)			120,000.00	1	120,000.00 USD

The supplier subtotal is 140,000.00 USD, and shipping is 0.00 USD.

Once you click/select Submit Requisition the following message will display:



The screenshot shows the UShop TEST interface after the requisition has been submitted. The main heading is "Requisition Submitted" with a green checkmark icon. Below this, there are "Next Steps" and a "Requisition Summary" section.

**Next Steps**

You can view or print this at: [Requisition 1578397](#), or via the [Document Search](#) page

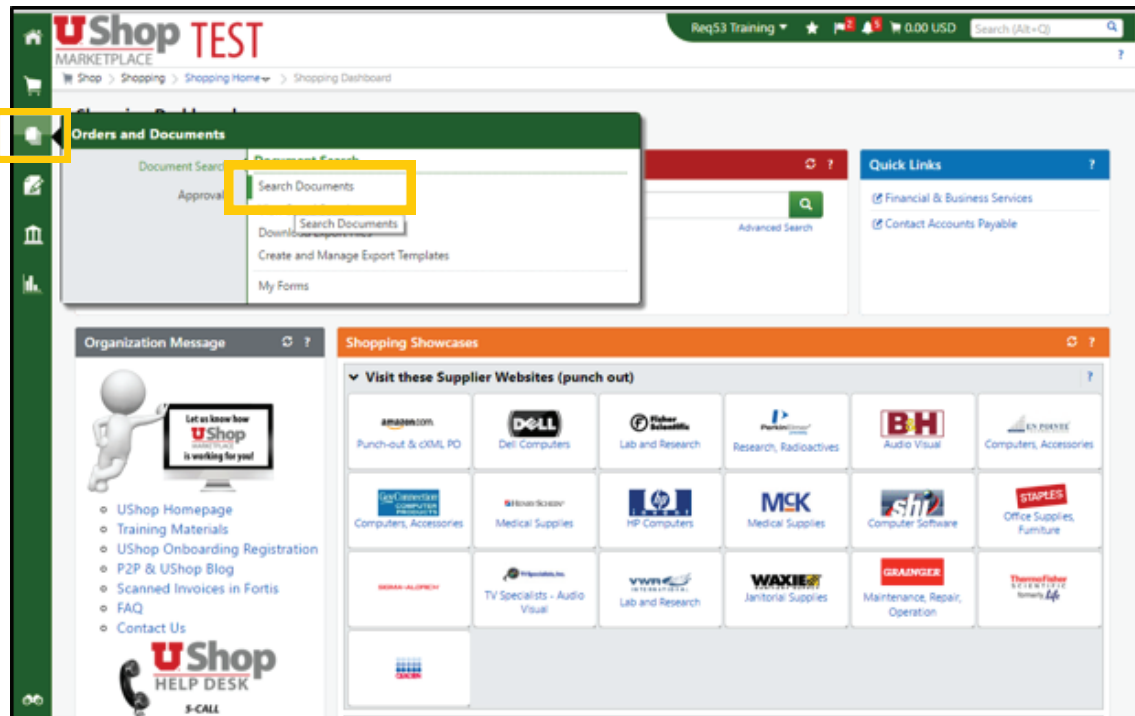
- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

**Requisition Summary**

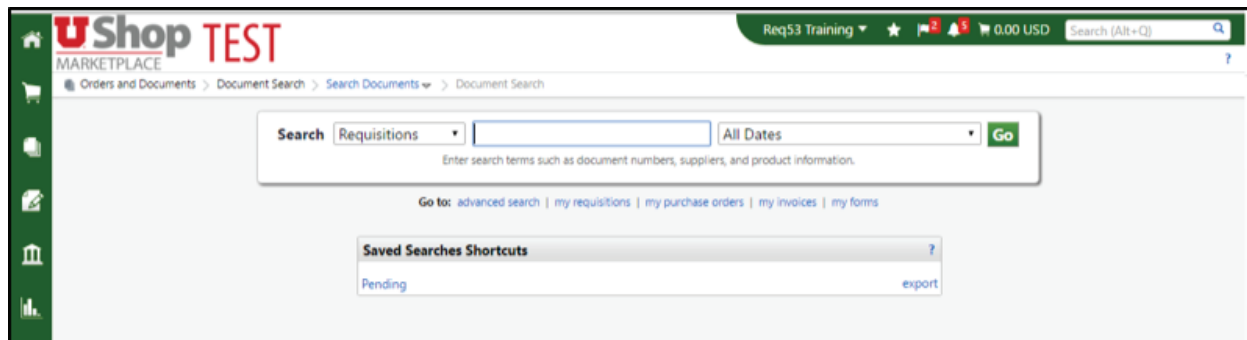
Requisition number	1578397 <a href="#">Quick View</a>
Requisition status	Pending
Cart name	IHC Pediatric Cardiology
Requisition date	5/23/2016
Requisition total	140,000.00 USD
Number of line items	2

## 12. Verify Lease Requisition Submission(s)

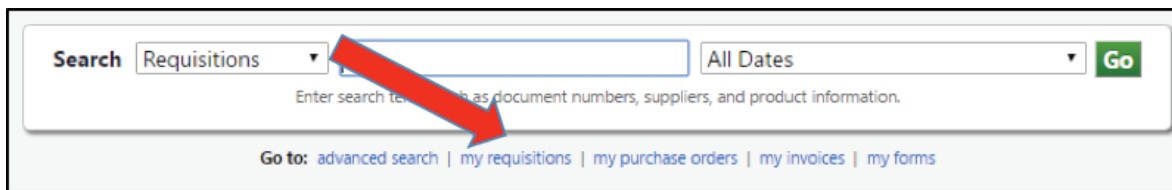
Select/Click the “Orders and Documents” Icon on the far left green bar, then select “Search Documents”



The following will display:



Click / Select “my requisitions”



You should see a report of all requisitions submitted by you. You can further filter by date, supplier, etc:

Showing 1 - 3 of 3 Results					
All Dates					
Results Per Page	Sort by:		Page 1 of 1		
Requisition No.	Supplier(s)	Requisition Name	Shopper	Requisition Date/Time	Requisition Total
1578397	INTERMOUNTAIN HEALTH CARE INC	IHC Pediatric Cardiology	Req53 Training	5/23/2016 8:26 AM	140,000.00 USD
1576429	INTERMOUNTAIN HEALTH CARE INC	2016-05-18 u0533329 01	MARIA C NIELSEN	5/20/2016 11:33 AM	4,000.00 USD
1577716	INTERMOUNTAIN HEALTH CARE INC	2016-05-19 u0996518 05	SCOTT PATTEN	5/19/2016 5:43 PM	26,000.00 USD

### **13. How to Renew Lease(s) for Next Year**

As the next fiscal cycle approaches and you have to renew your lease(s) again you may generate your own list of lease(s) by following the steps outlined above (Step 9). Once you have isolated all of your lease(s) that need to be renewed then you can copy the previous year's requisition to a new cart, make appropriate edits as needed and submit your order for the coming twelve (12) month cycle of your lease(s).

For detailed instructions on copying a requisition to a new cart, see the Training Materials on the UShop Marketplace home shopping page – [fbs.admin.utah.edu/ushop](https://fbs.admin.utah.edu/ushop).

Should you need assistance at any time please reach out to the Purchasing office and someone will assist you. Should you have any questions please feel free to call the Purchasing office at 801-581-7241 or email at [askme@purchasing.utah.edu](mailto:askme@purchasing.utah.edu) at any time.