

**CUA Number:** CUACMD2021

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## **CUACMD2021 PANEL 2 – DEVICE LEASING Procurement Lifecycle Document**

HP Financial Services (Australia) Pty Ltd T/as HP Financial Services and HPE Financial Services (HPFS).

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# HP Financial Services (Australia) Pty Ltd



Integrated  
Financial Solutions



Hewlett Packard  
Enterprise

**HPE** Financial Services

**ABN:** 86 082 062 413

**ACN:** 082 062 413

## Contact information

### **Bruce Logan** - Primary Contact

WA State Manager

**Address:** level 6 / 265 Adelaide Tce PERTH WA

**Mobile:** 0427 130 663

**Email:** [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com)



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### **Amy Chia** - Secondary Contact

Sales Associate

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**Mobile:** +60 12 517 1885

**Email:** [amy.chia@hpe.com](mailto:amy.chia@hpe.com)

Please refer to [General Enquiries](#) for general contact details.

### **Business Hours:**

8.30am to 5.00pm Monday to Friday excluding public holidays

### **Orders:**

For obtaining Lease quotes or for placing orders, please send an email request to [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and or [amy.chia@hpe.com](mailto:amy.chia@hpe.com), refer page 9 of this document for further details or feel free to **call Bruce on 0427 130 663** to discuss your needs via teams



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# Offered Services

HP Financial Services Offers **operational leasing** for devices and other hardware for all CUACMD2021 Brands and Product Types.

We have summarised below the main features of our facility:

- Technology leasing for devices and other hardware/solutions for all CUA brands.
- Lease terms from 12 to 60 months and any term in between. We can go beyond 60 months terms and that would be by negotiation.
- 24/7 Online asset management reporting **Customer Portal** (please refer to PLD resources)
- Force for Good Financing
  - <https://www.hpe.com/psnow/doc/a50007979enw>
- Local WA based Account Manager

Please feel free to contact **Bruce Logan** on **0427 130 663** or email [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) for further information regarding the facilities available to your organisation. Your representative has worked for HPFS for 23 years and he has worked in the financing and accounting industry for 35 years.
- **End of Lease Circular Economy Reporting** (please refer to PLD resources)

## **Offered Ancillary Services**

We can collect your leased and or owned equipment in a safe and secure manner to complete the Data Sanitisation of the devices. Chain of custody is vital to the success of this process.

The leased or owned asset return and processing will be managed by our End of Lease Asset Management Team with the equipment to be processed by our specialist technology service partner (Approved dealer) for reuse and recycling at their Jandakot WA site.

The following Ancillary Services are offered by HPFS under CUACMD2021:

- Collection (chargeable fee to the customer).
- Data Sanitisation (no separate charge for HPFS leased assets)
- Secure Data Erasure (no separate charge for HPFS leased assets)
- Hard drive shredding (upon request and chargeable fee to the customer)
- Reuse and Recycle (no separate charge for HPFS leased assets)
- Circular Economy Reporting to assist your sustainability goals and help with your external reporting of your organisation's sustainability targets (no separate charge for HPFS leased assets)

# Buying Process

To establish a lease agreement with HP Financial Services (Australia) Pty Ltd under Panel 2 Customers must follow the process summarised below:

Step	Responsible Party	Action
1	Customer	Define Product and service requirements
2	Customer	Issue RFQ to Panel 1 Contractors in accordance with CUA Buying Rules
3	Panel 1 Contractors	Submit Offers to the Customer in response to the RFQ for the required Products and Services.
4	Customer	Select best value for money Offer and advise successful Panel 1 Contractor of acceptance of Offer and <b>intention to Lease</b> .
5	Customer	Prepare RFQ which includes the Device prices from the successful Panel 1 Contractor's Offer including any additional Service requirements.
6	Customer	Issue the RFQ to Panel 2 Contractors in accordance with the CUA Buying Rules.
7	Panel 2 Contractors	Submit Offers to the Customer in response to the RFQ for the required Services.
8	Customer	Select best value for money offer and advise successful Panel 2 Contractor of acceptance of offer. Also advise Panel 1 Contractor the name of the successful Panel 2 Contractor.
		<b>In the case where HPFS been selected as the preferred Panel 2 Contractor, the process as follows:</b>
9	HPFS	<b><u>For first time Customers only</u></b> , HPFS shall prepare and send to the Customer the Master Lease Agreement (MLA) and complete Customer's authorised officer's identification process as part of Australia AML legislative framework.  Our preference is the use Adobe e-sign platform as this process is efficient and saves the need to print off and wet sign documents and then scan those documents and email those back to us. The Adobe platform is linked to our Customer Portal and the customer can access and download copies of all current and past documentation.
10	Customer	Sign and return MLA and AML to HPFS
11	Panel 1 Contractor	Provide any Pre-deployment Ancillary Services ordered by the Customer (where applicable).
12	Panel 1 Contractor	May need to set up HPFS in their accounting system and the panel 1 contractor may seek a Vendor Authorisation Letter (VAL) from us to confirm that the customer is all credit approved with HPFS and that we authorise panel 1 Contractor to ship the solution to the customer.

13	Customer	Customer may seek end of Lease Pack and Ship Services (PASS) from HPFS before the inception of the lease based on the Zone 1 or 2 locations
14	HPFS	We will provide PASS quote to the customer for review and if agreed, then HPFS will invoice the customer for those services at inception of the Lease schedule.
15	Panel 1 Contractor	Deliver Products to the Customer and provide any applicable installation Services ordered by the Customer.
16	Panel 1 Contractor	After success delivery of the solution to the customer, Panel 1 Contractor will invoice HPFS for the solution.
17	HPFS	Send copy of the invoice/s to customer to confirm that the solution and the prices matches with what the customer agreed to purchase the solution at.
18	Customer	Customer to confirm with HPFS to proceed to preparation of the Lease schedule documentation.
19	HPFS	We will prepare and send Lease Schedule and Certificate of Acceptance to the customer for execution. As stated earlier, our preference is to use Adobe e-sign, although we can still offer to email documents for print off and wet signing, as the Adobe platform is extremely efficient and effective and saves on printing costs and time.
20	Customer	Execute docs via Adobe or print off and wet sign and scan back to HPFS.
21	HPFS	Once we receive the duly executed documentation, HPFS will settle and pay the Panel 1 supplier and usually within 2 business days. And the lease commences.
22	HPFS	We will populate our online Customer Portal with the Leased asset details including dates, financial information and asset details as well as PDF copies of all documentation.
23	HPFS	We will issue invoices electronically through our paperless billing system attached to our Customer Portal or Tax Invoices can be emailed to the customer's accounts payable teams and payments can also be paid via Direct Debit system.
<b>Prior to Lease Expiry</b>		
24	Customer	At least 30 days prior to expiry of the lease schedule, customer to advise HPFS whether the equipment is to be returned or the Lease is to be extended
25	HPFS	If equipment is to be returned, HPFS returns team will co-ordinate arrangements for collection of the leased products and other post-lease services with the Customer
26	HPFS	Undertake collection of the Products from Customer's premises or an alternative collection point agreed with Customer
27	HPFS	Undertake inventory and condition audit of consignment returned by Customer and notify Customer of any missing items and or damaged goods within 20 business days from the equipment collection date. If there is dispute regarding damage beyond fair, wear and tear, will provide photographs or we will

		invite the customer to inspect the goods. Inspection by the customer must occur within 20 days of the request from HPFS.
28	HPFS	Provide post-lease Ancillary Services ordered by Customer
29	HPFS	Issue invoice for any outstanding costs to Customer including post-lease service fees, damage costs and/or remediation fee for return of device after optional destruction of hard drive as an example
30	Customer	Pay final invoice for any post-lease services and/or damages beyond fair, wear and /or the costs of remediation or pay for the device/s that have not been returned.
Where Equipment not returned and Lease to be extended		
31	HPFS	Agree with customer on extension term and prepare and send the extension documents to the customer for signing.
32	Customer	Customer returns signed extension agreement and pays extension rentals until equipment is returned or the lease is extended again, or the customer advises HPFS to come and collect the equipment at the end of the extension period. Please refer to points 24 – 30 above as that returns process applies here too.

# Buying Method

The Customer must follow the [CUA Buying Process](#). After obtaining quotes from Panel 1 Contractors the Customer must prepare a Request for Quotation (RFQ), using the **CUACMD2021 – Panel 2 Quote and Order Form** or Customer organisation's own form.

## 1- Obtain Quotes

You can use the **CUACMD2021 – Panel 2 Quote and Order Form** or your organisation's own quote form to seek leasing quotes from HP Financial Services (Australia) Pty Ltd (HPFS). Please ensure you reference the CUA number "CUACMD2021".

### **STEP 1:**

Copy pricing from accepted Panel 1 offer into **Appendix A** of the **CUACMD2021 – Panel 2 Quote and Order Form** ("P2 Quote Form") or as an appendix to your organisation's own form.

### **STEP 2:**

Complete the P2 Quote Form or your organisation's own quote form with any required ancillary services into **Appendix B**.

### **STEP 3:**

To obtain a Quote for Panel 2 products/services, send the CUA Order Form or your agency's order form to [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) along with the other two Panel 2 Contractors via email.

**Note:** CUA Buying Rules require Customers to request written quotations from **all Panel 2 Contractors** irrespective of monetary value.

Note: Minimum information requirements to provide to HPFS:

- Lease Quotation response due date & time.
- Lease term requested (12 – 60 months and any term in between, terms greater than 60 months by negotiation)
- Payment frequency requested (monthly/quarterly/ bi-annual, annual, or structured)
- Full equipment details: Brand, type, model, specifications, quantity, cost price per unit excl. GST, total cost price excl. GST.
- Expected equipment delivery date of the solution.
- Force for Good Lease option
- Details of Post Lease Services requested such as our pack and ship services (PASS)
- Panel 1 supplier details including representative name and email address.

**STEP 4:** Evaluate quotes and if you determine that HPFS has suitable Goods and/or Services, then proceed to **2 – Confirm intention to Lease**.



## 2- Confirm the Lease

You can use the **CUACMD2021 – Panel 2 Quote and Order Form (“P2 Order Form”)** or your organisation’s own order form to accept [HP Financial Services \(Australia\) Pty Ltd](#) Lease Offer.

- **STEP 1:**

Confirm all details are correct in the P2 Order Form and complete the “Order Summary” sheet and email confirmation to Bruce Logan at [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and or [amy.chia@hpe.com](mailto:amy.chia@hpe.com) that HPFS is to be your Contractor for the said solution.

- **STEP 2:**

For the first transaction with HPFS, we will provide your organisation with a Master Lease Agreement (MLA) and any AML documentation. Ideally, the P2 order form will include names and emails addresses of the people within your organisation that have the delegated authority to sign and complete the documentation. We would ideally like to use Adobe e-sign and so we would anticipate one person would be nominated as the approver/reviewer and one person would be nominated as the signer with the delegated authority. In case of wet signature, process much the same, PDF documents will be sent to you for print off, execution and return to us the signed scanned copies. **We do not require the original documents to be sent back to us.** We will accept the documents and the signed copies will be available in our Customer Portal for you to access and download copies as required.

- **STEP 3:**

Send the signed Order Form including any attachments to [HP Financial Services \(Australia\) Pty Ltd](#) via email to: [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and or [amy.chia@hpe.com](mailto:amy.chia@hpe.com)

- **STEP 4:**

HPFS will issue a confirmation of the order in the form of a lease schedule (MLA Appendix 1 or equivalent form). The lease schedule can be sent in (1) Pdf format for manual signature or (2) a DocuSign format for electronic signature, please advise HPFS of your preference, i.e. (1) or (2).

## 3 – Post Lease Services

You can engage with [HP Financial Services \(Australia\) Pty Ltd](#) for optional post-lease services. These post-lease services must be either:

- ordered and paid upfront as a lump sum fee; or
- ordered and paid as a lump sum post lease.

Service charges cannot be rolled into lease instalments and may not be subject to interest under CUACMD2021.

**STEP 1:** Per Method 2 include post-lease services in the Order Form to [HP Financial Services \(Australia\) Pty Ltd](#). To finalise these services details must be included in the MLA.

## 1 - Collection (optional)

Customer to advise contractor via email at [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) or [amy.chia@hpe.com](mailto:amy.chia@hpe.com) at least 15 business days prior to the inception of the lease of the need for these collection services. Contractor shall issue customer with the quotation and if the services are accepted, then we shall issue Tax Invoice for these services for upfront payment of these future collection services. In the case of post lease collection services, customer should contact contractor to obtain quote for post lease collection services at least 15 business days prior the collection is required by the customer. If customer accepts quotation, Tax Invoice will be issued to the customer for payment for these services.

## 2 – Data Sanitisation (optional)

Once the end of lease items is returned to our warehouse, we undertake the data sanitisation services at our secure site in Jandakot, WA.

Where a customer requires a certificate of sanitisation for those returned devices, we would provide a quotation for these services and once accepted by the customer, we would issue a Tax Invoice to the customer for these services after which we would then issue a certificate. The request for these services via email to [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and/or [amy.chia@hpe.com](mailto:amy.chia@hpe.com)

## 3 – Disposal

In majority of returns, we would expect to remarket the returned devices and where the devices are damaged and are not capable of being remarketed, then we would work with local recyclers to dispose of the assets.

## Payment of invoices

Payments are made in arrears and details are specified in the MLA document.

Payment methodology is ideally managed via Direct Debit or ETF and depending on payment frequency, these payments would be payable at the end of the month, for monthly in arrears and paid at the end of the quarter, for quarterly in arrears.

**Note:-**We cannot accept credit card for our Lease payments

## Delivery

Delivery Services are out of scope for Panel 2 and are managed by the Panel 1 Contractor.

## Disposal and recycling

The Customer may contact HPFS by email at [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and/or [amy.chia@hpe.com](mailto:amy.chia@hpe.com) for specific ad-hoc equipment disposal Services.

## **Return of rejected goods**

We will accept return of “rejected” goods and we will process like we would process non rejected goods. Where the customer agrees and accepts the goods have been rejected (damaged beyond fair wear and tear), which may include an inspection of the goods at our Jandakot warehouse, we will issue the customer with report and the cost of the rejected goods, whether that be that cost to make good or where the devices are damaged beyond repair, the cost of the residual investment. Once the customer accepts, we will issue a Tax Invoice to the customer for the payment for the rejected good/s.

## **Account management and invoicing**

We will offer Customer Portal to all the customers and the purpose of this solution will allow the customer to access the payment Tax Invoices as well as details of the leases including PDF copies of all the lease documentation. Please review the PDF inserted below for the services available using the Customer Portal.

# Contact information for Account Management

## Admin/collections

**Email:** [hpefs.anzcas@hpe.com](mailto:hpefs.anzcas@hpe.com)

### Hours

Monday to Friday 8.00am to 5:00pm,

## All Other Enquires

### **Bruce Logan** - Primary Contact

WA State Manager

Level 6 / 265 Adelaide Tce. Perth WA 6000

**Mobile:** 0427 130 663

**Email:** [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com)



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### **Amy Chia** - Secondary Contact

Sales Associate

**Phone:** N/A

**Mobile:** +60 12 517 1885

**Email:** [amy.chia@hpe.com](mailto:amy.chia@hpe.com)

Please refer to [General Enquiries](#) for general contact details.

### **Business Hours:**

8.30am to 5.00pm Monday to Friday excluding public holidays

### **Orders Via:**

For obtaining Lease quotes or for placing orders, please send an email request to [bruce.logan@hpe.com](mailto:bruce.logan@hpe.com) and or [amy.chia@hpe.com](mailto:amy.chia@hpe.com), refer page 9 in this document for further details or feel free to **call Bruce on 0427 130 663** to discuss your needs via teams



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