
HP Financial Services Customer Portal

Helping customers work more effectively



Real-time Contract Management

– Manage contract level information such as commencement dates, rental amounts, terms...



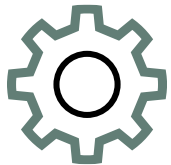
End of Term Contracts

– Review contracts approaching maturity and quickly make end of term decisions (Buyout, Renew, or Return assets)



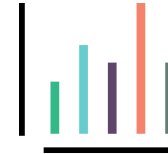
Contract Documents

– Quickly view and download global contract documents from a single repository



Asset Maintenance

– Quickly update asset information such as serial numbers, purchase order numbers, and equipment locations



Asset Reporting

– Quickly customize and save asset reports that can be scheduled to run on a recurring basis.



Real-time invoice information

– Quickly view and download open/closed invoice copies



Reminder Notifications

– Manage contracts milestones thru booking, invoicing, and end of term notifications



Contact HP Financial Services

– Our experts are available to resolve any customer issue quickly and effectively.

Landing Page, Access & Menu

Contract origination

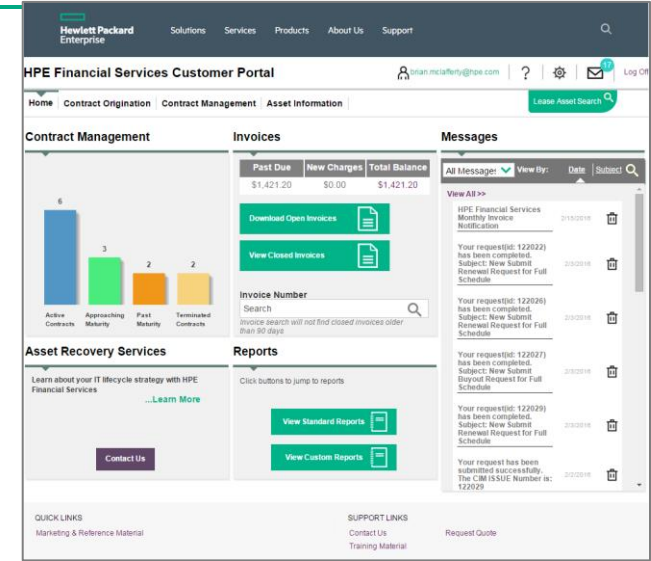
You can easily sign necessary documents and quickly see all the documents HPEFS stores

Contract management

Helps you understand and manage your portfolio of contracts, your payments and what choices can be made at the end, that best suits your needs

Asset management

Gives you the ability to get reports and manage key information on your Portfolio



Administrator

- Has complete control over who has access to the portal and their level of access
- Can view Documents
- Can approve documents within the portal, like Contracts, Certificate of Acceptance
- Can use all reporting capabilities
- Can request end of term quotes

General

- Can view Documents
- Can use all reporting capabilities
- Can request end of term quotes
- Can view all other users linked to the account

Approver

- Can view Documents
- Can approve documents within the portal like Contracts, Certificate of Acceptance
- Can use all reporting capabilities
- Can request end of term quotes
- Can view all other users linked to the account.

Leasing User

- View can be limited at set up to either
- ASSET INFO ONLY will only see Asset Information tab only
- INVOICE INFO ONLY will see both Contract origination and Contract Management tabs
- User can be set with both

View & Download Documents

Contract Origination / Documents

HPE Financial Services Customer Portal

Home | **Contract Origination** | Contract Management | Asset Information

Search View/Download Upload Remove

<input type="checkbox"/>	Customer Name	Contract Number	File Description	Doc Type	Doc Status	Size(KB)	Created By	Last Modified On	Last Modified By	Document Id
<input type="checkbox"/>	Customer Portal Demo		Test-Ignore	Customer Support		130	psdemo@hp.com	3/9/2016	psdemo@hp.com	222487
<input type="checkbox"/>	Customer Portal Demo		Demo E-sign	Schedule		130	\$hpfsdtrimpro001	2/2/2016	\$hpfsdtrimpro001	218445
<input type="checkbox"/>	Customer Portal Demo		Rate card sample_4629658967_640.docx	Rate Card		0	EMEAISOFR	2/1/2016	EMEAISOFR	218153
<input type="checkbox"/>	Customer Portal Demo	DEMO E SIGN	Demo E-sign	Schedule		130	\$hpfsdtrimpro001	2/1/2016	\$hpfsdtrimpro001	218151
<input type="checkbox"/>	Customer Portal Demo		Sign on Paper new veiw	Schedule		118	\$hpfsdtrimpro001	12/8/2015	\$hpfsdtrimpro001	211024
<input type="checkbox"/>	Customer Portal Demo		Sample Sign on paper DS	Schedule		121	\$hpfsdtrimpro001	12/8/2015	\$hpfsdtrimpro001	211023
<input type="checkbox"/>	Customer Portal Demo	4804905370SCHEДУLE1	Sample Digital Signature	Schedule		125	\$hpfsdtrimpro001	7/25/2015	\$hpfsdtrimpro001	191795
<input type="checkbox"/>	Customer Portal Demo		Test-Ignore	Customer Support		102	psdemo@hp.com	3/7/2015	psdemo@hp.com	165921
<input type="checkbox"/>	Customer Portal Demo		COA Firmado	Executed Documents		12	pilar.garrido@hp.com	11/25/2014	pilar.garrido@hp.com	149932
<input type="checkbox"/>	Customer Portal Demo		Contrato Prueba	Executed Documents		600	CDDemo@hp.com	11/18/2014	CDDemo@hp.com	148312

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Invoices

HPE Financial Services Customer Portal

Home | Contract Origination | **Contract Management** | Asset Information | Asset Recovery Services

Search View Details Export to Excel

<input type="checkbox"/>	Customer Name	Customer Code	Geography	Country	Currency	Total	0_30 Days	31_60 Days	61+ Days
<input type="checkbox"/>	KST Data, Inc.	2131071614	NA	United States of America	USD	\$7,747,292.87	\$67,648.34	\$5,754.98	\$7,673,889

Search Send PDF image to inbox Query / Dispute Export All Open Invoice To Excel

<input type="checkbox"/>	Customer Name	Customer Code	Contract Number	Invoice Number	Invoice Date	Invoice Due Date	Invoice Type	Original Value	Open Value	Currency	Rental Period Begin Date	Rental Period End Date
<input type="checkbox"/>	KST Data, Inc.	2131071614	2131071614000005	506404840	4/19/2014	6/1/2014	Firm Term	\$15,807.09	\$15,125.19	USD	6/1/2014	6/30/2014
<input type="checkbox"/>	KST Data, Inc.	2131071614	2131071614000006	506404841	4/19/2014	6/1/2014	Firm Term	\$21,617.59	\$21,617.59	USD	6/1/2014	6/30/2014
<input type="checkbox"/>	KST Data, Inc.	2131071614	2131071614000007	506404842	4/19/2014	6/1/2014	Firm Term	\$9,089.76	\$9,089.76	USD	6/1/2014	6/30/2014
<input type="checkbox"/>	KST Data, Inc.	2131071614	2131071614000001	506444588	5/17/2014	6/1/2014	UPM	\$19,898.86	\$8,457.74	USD	6/1/2014	6/30/2014
<input type="checkbox"/>	KST Data, Inc.	2131071614	2131071614000002	506444589	5/17/2014	6/1/2014	UPM	\$13,281.30	\$4,696.78	USD	6/1/2014	6/30/2014

End of Term decision (Buyout & Extend)

Automatic pricing & submission (selected customers)

HPE Financial Services Customer Portal

hpfsttraininguser@hp.com

Home | Contract Origination | **Contract Management** | Asset Information | Asset Recovery Services

Full Pricing Quote | Partial Pricing Quote | Additional Assistance | Saved Quotes | Export to Excel

Contract Note

Please note that the information displayed on this page is provided for discussion and information purposes only. It does not include all terms and conditions that will apply to transaction between the parties. Quotations are indicative and for discussion purposes. HP Financial Services ("HPFS") shall have no legal obligation until, among other things, (1) parties have executed mutually acceptable written documentation (which will include other provisions that are not described on this page) and (2) all requisite internal approvals received. Either party may terminate negotiations regarding a possible transaction at any time, without cause and without any liability whatsoever. Unless otherwise provided above pricing quotations have a validity period of thirty (30) days from date of proposal and shall be exclusive of all taxes, assessments or charges.

Filter: All Contracts

	Customer Id	Customer Name	Contract ID	Maturity Date	Currency
<input type="checkbox"/>	2131071614		2131071614000001	31.1.2014	USD
<input type="checkbox"/>	2131071614		2131071614000002	31.3.2014	USD
<input type="checkbox"/>	2131071614		2131071614000003	30.4.2014	USD

Contract Management / Buyout & Extend

What can be done here?

- Compare EOT prices
- Request FULL or Partial quotes
- Make immediate decision for Buyout or Extend
- Save quotes for 30 days
- Provide EOT PO number

End Term Buyout & Extension Quotes

Customer Name: KST Data, Inc.

	Contract Number	Option	Quote Date	Quote Expiry Date	Maturity Date	Extension Term	Effective Date	PO Number	Price
<input type="checkbox"/>	Jevons20160516EEE	Buyout	7.6.2016	9.6.2016	25.7.2016		26.7.2016	<input type="text"/>	\$2,250.00
<input type="checkbox"/>	Jevons20160516EEE	Extension	7.6.2016	9.6.2016	25.7.2016	12	26.7.2016	<input type="text"/>	\$157.58

End of Term decision (Buyout & Extend)

Request for quote

Contract Management / Buyout & Extend

What can be done here?

- Send FULL or Partial requests for buyout or extension quote.

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Home | **Contract Origination** | **Contract Management** | **Asset Information** | **Asset Recovery Services**

Full Pricing Quote | **Partial Pricing Quote** | **Additional Assistance** | **Saved Quotes** | **Export to Excel**

Contract Note ✓
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Filter: **Reset** All Contracts

	Customer Id	Customer Name	Contract ID	Maturity Date	Currency
<input type="checkbox"/>	2131071614		Test20160222b	31.8.2016	USD
<input type="checkbox"/>	2131071614		Jevons20160516ccc	15.8.2016	USD
<input type="checkbox"/>	2131071614		2131071614000023	31.7.2016	USD
<input checked="" type="checkbox"/>	2131071614		Jevons20160516EEE	25.7.2016	USD

End Term Buyout & Extension Quotes

Customer Name: KST Data, Inc.

	Contract Number	Option	Quote Date	Quote Expiry Date	Maturity Date	Extension Term	Effective Date	PO Number	Price
<input type="checkbox"/>	Jevons20160516EEE	Buyout	7.6.2016	9.6.2016	25.7.2016		26.7.2016		\$2,250.00
<input type="checkbox"/>	Jevons20160516EEE	Extension	7.6.2016	9.6.2016	25.7.2016	12	26.7.2016		\$157.58

*Please note all prices shown do not include VAT
All rents issued and due up to effective date are still valid and need to be paid

Cancel | **Previous** | **Save Quote** | **Submit**

End of Term (Returns)

Return Request Form New

1 Logistics Services > 2 Shipping Arrangements > 3 Equipment Details > 4 Site Details

Customer:

Contract ID:

Logistics Services: ?

Choose one of the following: *

Packaging And Shipping Equipment Pickup Only Self Ship

Existing Contract Obligations

Contract Number	Obligation Type	Obligation Description
Demo Schedule 1	RETURN SERVICES	One Pass Wipe
Demo Schedule 1	LOGISTICS SERVICES	Pack and Ship - HPFS

Contract Management / Returns

What can be done here?

- Send a request for a full or partial return
 - Packaging & Pick Up
 - Pick up only
 - Self ship
- Follow progress of a return has it happens
- Save drafts of return requests

Reports

HPE Financial Services Customer Portal

Home | Contract Origination | Contract Management | **Asset Information**

Standard Custom Run Customize/Schedule

	Report Name ↕
<input checked="" type="radio"/>	All Data Download Report
<input checked="" type="radio"/>	Customer Contract Report
<input checked="" type="radio"/>	Invoice Report: Detailed view
<input checked="" type="radio"/>	Invoice Report: Paid Invoices

Report Details

Customized Report Name: *

Customized Report Description: *

Recipient E-mail Address:

Make Private:

Schedule Details

My Selected Columns

Report	Columns	
		<input type="checkbox"/>
↕	Amid 2 Number	<input checked="" type="checkbox"/>
↕	Asset Code	<input checked="" type="checkbox"/>
↕	Asset Description	<input checked="" type="checkbox"/>
↕	Asset Group	<input checked="" type="checkbox"/>
↕	Asset Status	<input checked="" type="checkbox"/>
↕	Billing Frequency	<input checked="" type="checkbox"/>
↕	City	<input checked="" type="checkbox"/>
↕	Contract Code	<input checked="" type="checkbox"/>
↕	Contract Currency	<input checked="" type="checkbox"/>
↕	Contract Description	<input checked="" type="checkbox"/>
↕	Contract Maturity Date	<input checked="" type="checkbox"/>
↕	Contract Number	<input checked="" type="checkbox"/>
↕	Contract Start Date	<input checked="" type="checkbox"/>
↕	Country	<input checked="" type="checkbox"/>
↕	EOL Notification Days	<input checked="" type="checkbox"/>
↕	Effective Date	<input checked="" type="checkbox"/>

Asset Information / Reports

What can be done here?

- Run one of 16 standard reports
- Customized the standard reports
- Create new customized report from the start
- Schedule reports recurrence running time/dates

Asset Maintenance

HPE Financial Services Customer Portal CDDemo2013 ? ⚙️ 📧³¹ Log out

Home | Contract Origination | Contract Management | **Asset Information**

Search Edit Download Update Template Upload Update Template

Please Note: display data is 24 hours old.

	Customer Code	Customer Name	Geography	Country	Contract Number	Contract Start Date	Maturity Date	Contract Status	Term (Months)	Remaining Term	Total Value	#
○	4804905370	Customer Portal Demo	EMEA	United Kingdom	Customer Demo Test Dec 15	12/1/2015	1/31/2016	Terminated, no maintenance is allowed	2	0	450,00 €	3
●	4804905370	Customer Portal Demo	EMEA	United Kingdom	Demo Schedule 1	11/1/2012	12/31/2012	Active	2	0	1,00 €	4

Full Contract Level Updates ✕

Non-Financial Field	Current Value
<input type="checkbox"/> PO Number	Multiple
<input type="checkbox"/> Asset Location	Cain Rd. Amen Corner , Bracknell RG12 1HN
<input type="checkbox"/> Bill To Location	Barnhall Rd. Attention To Sonia Francavilla, Leixlip NA...

Please note: the Asset Location and Bill-to Location update requires Customer Support approval.

Update

Asset Information / Asset Maintenance

What can be done here?
Allows the Customer to modify non-Financial information

- SN
- PO #
- Asset location
- Bill to location

Standard Reporting Elements

Available Reporting Data Fields

- Customer Name
- Customer Code
- Invoice Number
- Payment Due Date
- Invoice Type
- Asset Description
- Serial Number
- Purchase Order #
- Schedule Description
- Rent
- Tax amount
- Total rent
- Acceptance Date
- Expiration Date
- Payment type
- Customer Defined data
- HPFS Asset Code
- Manufacturer Name
- Manufacturer Part Number
- Equipment type
- End of term notice
- Physical Location
- Schedule Number
- Supplier Name
- Supplier invoice#
- Equipment Cost
- Currency
- Billing Frequency
- Term
- Remaining Term
- HPFS Location Code
- Parent Asset ID
- Asset Status
- Effective Date