White paper

Account Onboarding and Device Service Entitlement

HP Managed Print Specialist - Resell

Table of contents

As new Managed Print Services (MPS) contracts are signed, customer onboarding is initiated. Onboarding a new customer is a carefully orchestrated process requiring the partner to document important information in the HP database enabling customer account activation, user access to service resources, and entitlement to devices for ongoing service management.

Closed Sale & Contract Signed > Account Details Recorded > Ensure Device Reporting Tools Instaled > Pre-Onboarding Activities > Initiate Service

Figure 1: Customer Onboarding Process

MPS Customer Account Onboarding Overview

Customer onboarding and account activation is the process by which customer devices are entitled for service. Service access and service request process instructions are provided to your customer, and printed pages are tracked for billing purposes. You play a key role in documenting required customer data in the HP MPS management system.

Partner Onboarding Responsibilities

Once the contract has been signed by the customer, and HP page rate pricing has been accepted, the following steps are completed by the partner (usually the assigned account manager) to engage the HP service team and provide finalized account details:

- Assign customer primary contact(s) to support change management related to this service. Include administration and IT resources as needed.

- Document customer account information and locations accurately in the appropriate database including a primary contact. Providing this information allows dispatchers to assign service technicians to the correct location and ship supplies to the correct location. Invoices will be forwarded to the correct contact for processing and future sales-related conversations are directed to the right contacts as well.

- Gathering device data is critical for service delivery, accurate invoicing and efficient service delivery (page counts, supply levels, and other fleet monitoring activities). The following actions will enable accurate device data gathering practices:

  – If data collection tools were not installed during the sales process, complete installation before the account is activated.

    • Preferred data collection tools are the HP Universal Device Agent (UDA) for network connected devices and the HP Direct Connect Proxy (DCP) for local device reporting.

  – Assign a primary contact at the customer location for data collection tool administration.

  – Instate alternate data collection processes for devices that do not report page counts.

- Contact your HP MPS representative to request the assignment of an HP Onboarding Specialist to assist with the coordination of setting up the customer account.

- Schedule a pre-onboarding meeting for HP only, to review the following:

  – Clarification about who is installing any new devices (HP or the partner).

  – Review processes when customer requests automatic toner replenishment and how to manage expectations for the first 30 day period when no supplies are delivered automatically.

  – Charges resulting from supplies and parts provided during the health check process.

  – Determine disposition for devices that don't pass a health device check.

– Next steps and on-boarding tasks to be completed within Express Decision Portal.

End-user training is the partner's responsibility and should be provided as required to instruct the customer regarding service and supplies request processes, service and supplies delivery processes, as well as invoicing processes. Training should include the customer's responsibilities regarding the efficient use of managed print services. HP will provide basic tools to help facilitate training.

Customer Pre-Onboarding Meeting

Prior to service initiation, a meeting is required -including the customer primary contact and HP personnel- to determine customer needs, set expectations and document details related to:

- Location provisions (i.e., onsite contacts, security processes, safety requirements, and hours of operations) to help service technicians be informed and prepared prior to arriving at a customer's place of business.
- The onboarding approach that best fits the customer's needs; include details such as location, number of devices, and setup complexity.
- Devices to be managed, addressing devices out-of-scope for MPS coverage and any identified devices to be managed as exceptions.
- Actions to perform during a device health check process if issues are identified (repair, remove, or replace devices) and address any one-time charges that may be incurred.
- Device entitlement, device sticker application, and any other activities that will take place during onboarding with access to customer IT resources as needed.
- Service request and delivery processes across the fleet, and in each location; include a review of the automatic toner replenishment (ATR) process when applicable, and set expectations for gathering 30-days of data before the ATR service becomes active.
- Location onboarding prioritization and service initiation dates.

For larger accounts, those with multiple locations, or those with onboarding that require device installation and/or fleet optimization tasks, a plan detailing the decisions made during the onboarding readiness phase will be prepared and communicated by an HP Onboarding Specialist. Plans will vary widely, as each onboarding event is unique.

Service Entitlement of Managed Devices

During the onboarding process, and as mutually agreed, a series of actions will take place for each device:

- A health check may be performed to ensure the device is in appropriate working condition. Checks such as print quality, printer performance, and supplies levels will be completed.
- Application of device identification stickers is highly recommended. Each sticker provides a unique identification number and end-user directions to request service or supplies. The assigned device identification number (as displayed on the sticker), or device serial number, will be used when placing service requests.
- Initiate device data collection processes necessary for entitlement, including documentation of serial numbers (if applicable), start page counts and accurate location details. This data will be recorded to align with the unique device identification number in the MPS management system.

Once the account is under management, requests for "new device setup" service can be made for service entitlement of additional or newly acquired devices. Also, when proactive service is enabled, service technicians will sticker and entitle devices where the engine type has already been placed under contract.

NOTE: All devices of a similar make/model at a single location must be entitled to receive service. This practice negates supplies sharing with devices outside of the MPS contract.

Service Entitlement Methods

If the office or location has more than 10 devices to be entitled, HP will most likely choose to send a technician to the site to complete entitlement tasks.

- HP will assign an HP technician in the area, or make arrangements for a servcie partner to complete the entitlement phase.
- Device health checks will be performed before identification stickers are placed. Devices failing the health check must receive repairs before entitlement.
- Device identification stickers will either be shipped to meet the technician, or the technician will bring stickers onsite when conducting the healthcheck and entitlement work.

For locations with less than 10 devices HP will most likely send self-entitlement wecome packets to an employee at the site.

- Packets include instructions for collecting necessary data and providing it to HP. Packets also contain identification stickers with instructions for applying them to entitled devices.
- HP tech support makes contact with an employee at the location and reviews expectations regarding conducting simple health checks (must be able to print a configuration page and pass a simple print quality test), and methods for providing the follow-up information to HP.

Eligible Devices for Service Coverage

Service coverage under the HP MPS Resell program includes most popular business laser printers and multi-function devices in open distribution. The HP Express Decision Portal contains a pre-populated data set of devices eligible for service. Typically, devices to be managed are selected during the proposal generation and price quotation process. A request can be submitted through portal processes to add devices not currently listed in the portal to the MPS contract. A timely response will be provided.

Appendix

Resources, contacts, or additional links

For further guidance on the onboarding process and supported devices, please contact the HP support team or your HP MPS representative.

Additional White Papers

Device Reporting for MPS Management
- Explains data required to support MPS operational processes including invoicing and automatic toner replenishment.

MPS Service Management
- Explains processes for placing service requests and how services are delivered.

Learn more at
hp.com/go/mps