

# HP Financial Services Customer Portal: Manage your IT assets more effectively



**HP Financial Services** can help customers find new ways to plan for, acquire, consume and adapt the technology needed for workplace transformation.

The new world of IT requires more than your standard IT or financial solution. It requires the flexibility to adapt to change as it happens, with the control to access the information you need (when you need it) to best manage your IT investment strategy.

HP Financial Services Customer Portal is an online platform that provides 24/7 access to your account and billing details, creating the opportunity for you to track and manage your IT asset portfolio in real-time, worldwide. You don't need any special software—we've put everything in place for you.

From contract origination to asset management, our Customer Portal provides support through its comprehensive step-by-step suite of tools. So not only will you be able to better manage your assets, but you can also drive down your overall operating costs.

## Contract Origination

**Designed to help you manage new or extended contracts the origination section of the portal allows you to:**

- View and print in-process contracts
- Print, sign and upload pending documents
- Review complete list of assets (goods list) being financed
- View and print completed documents including Master Lease Agreements and previous schedules
- Upload customer-identified supporting documents (for example, certificate of acceptance, etc.)
- View quarterly/monthly pricing agreement/rates (if applicable)

## Solution brief

Visit us online at  
[hp.com/hpfinancialservices](http://hp.com/hpfinancialservices)

## Electronic Signatures

To help you effectively manage your account, we offer the option of electronic signatures (e-signatures) with an added authentication step for extra security.\* An e-signature is an electronic indication of agreement to the contents of a document, and replaces the need for a traditional hand-written signature. HPFS has partnered with Adobe to securely transmit specified signature documents via our Customer Portal linked to the vendor server.

## Benefits

- Sign contracts from any IT device (i.e. desktop, phone, tablet, mobile)
- Execute contracts faster
- Pay your suppliers faster
- Get full visibility to contract signature status throughout the signing process
- Automatically store and manage signed contracts
- Go green —with less paper, no mailing costs
- Free and simple to use—no downloads or installations required

## Contract Management

Deal with existing and maturing contracts as well as manage your end-of-term activities. You can complete the following tasks here:

- View contract details, including contracts within 140 days of contract maturity
- Review end-of-term pricing for buyout and renewal options per schedule (full transactions only)
- Search pending maturities
- Request a quote for partial transaction purchase or renewals
- Request partial or full transaction equipment returns
- Fill out return shipment forms

- Track and view pending and recent returns
- View equipment damages for returned equipment
- Request additional information

## Asset Information

The Asset Information section lets you manage and analyze information related to your equipment any time you like. You can:

- Review, query, filter and download all records related to your assets
- Create custom fields, such as cost center, department or employee ID
- Run, filter and export reports
- Update or add data to custom fields and attach information to reports

The portal provides standard and custom reporting. Standard reports give you the opportunity to view assets by schedule number, expiration date of schedule, serial number, equipment type, location, purchase order and supplier. And you can view, print and export reports when you need to.

## User Administration

You have complete control over who has access to the portal and their level of access. As an administrator, you can perform the following tasks:

- View and update personal profile information
- Add and manage individual user profiles
- Notify individuals via email of admin, signatory or user access privileges

Learn more at  
[hp.com/hpfinancialservices](http://hp.com/hpfinancialservices)

\* Electronic signature capabilities are available in select countries

**Contact** your local HP Financial Services Representative.



Share with colleagues

© Copyright 2018 Hewlett-Packard Development Company, L.P. The information contained herein is subject to change without notice. The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

Financing and service offerings available through Hewlett-Packard Financial Services Company and its subsidiaries and affiliates (collectively HPFSC) in certain countries and is subject to credit approval and execution of standard HPFSC documentation. Rates and terms are based on customer's credit rating, offering types, services and/or equipment type and options. Not all customers may qualify. Not all services or offers are available in all countries. Other restrictions may apply. HPFSC reserves the right to change or cancel this program at any time without notice.

4AA7-3421ENW, July 2018

