

# HP2B Account Manager Role

# Table of contents

Introduction	03
Account manager role	05
Customer self-service: Address book	07
Glossary	15
FAQ	16

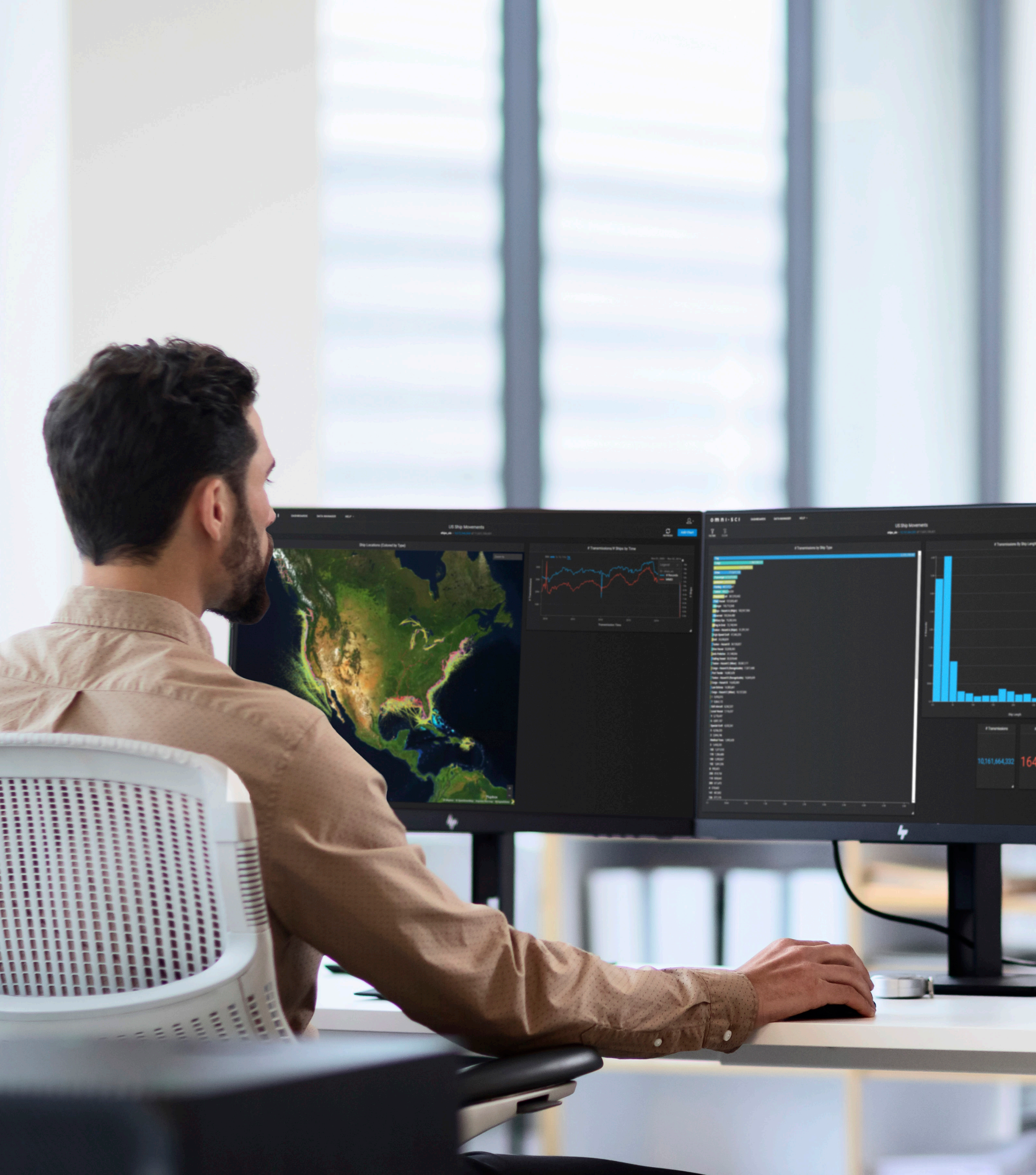
# Introduction



# Introduction

HP2B is your organization's own customized HP online store that frees you from the red tape and paperwork that is ordinarily part of IT procurement. Intuitive and easy to use, HP2B allows you to focus on the more value-producing aspects of your job.

This Quick Guide is designed to help you understand the responsibilities and rights of users who have been given the **account manager role**. You'll learn how to manage addresses when you have been assigned this role.





# Account manager role

# Account manager role

For the address book feature of HP2B, managers have the following access rights and responsibilities when compared to requesters (most users):

Once you have been assigned the account manager role, you will see the “**Manage Account**” menu in the top navigation bar of the HP2B Home Page.

The screenshot displays the HP2B account manager interface. At the top, a navigation bar includes links for Home, Products & Services, Orders & Quotes, Notifications, and Contact. A 'Manage Account' link is highlighted with a blue box, and the language is set to 'United States English'. Below the navigation bar is a dark header with a 'Message to the customer' dropdown. The main content area is titled 'STANDARDS' with a 'VIEW ALL' link. A horizontal menu below the title lists product categories: NEW PRODUCTS (5), NOTEBOOKS (1), OFFICE NOTEBOOKS (2), WORKSTATIONS (2), PRINTERS (1), and MOBILE WORKSTATIONS (3). The 'NEW PRODUCTS (5)' category is selected. Five product cards are displayed, each with an image, name, part number, quantity selector, price, and action buttons. The products are: Workstation Z4 G4 (part number 34384638, price GBP 4,286.17), 800 SFF Desktop ADVANCED (part number 174664, price GBP 1,183.87), EliteBook 830 Bundle (part number 174661, price GBP 1,432.00), LaserJet MFP M830z with Paper Tray and Stand (part number 169476, price GBP 9,765.05), and HP EliteOne 800 G5 23.8-inch All-in-One (part number P\_7XK66AW, price GBP 1,325.00). The 'EliteBook 830 Bundle' card has a 'SELECT OPTIONS' button, while the others have 'ADD TO CART' buttons. The 'Workstation Z4 G4' card also has a 'CONFIGURE' button.

# Customer self-service: Address book


# Customer self-service: Address book

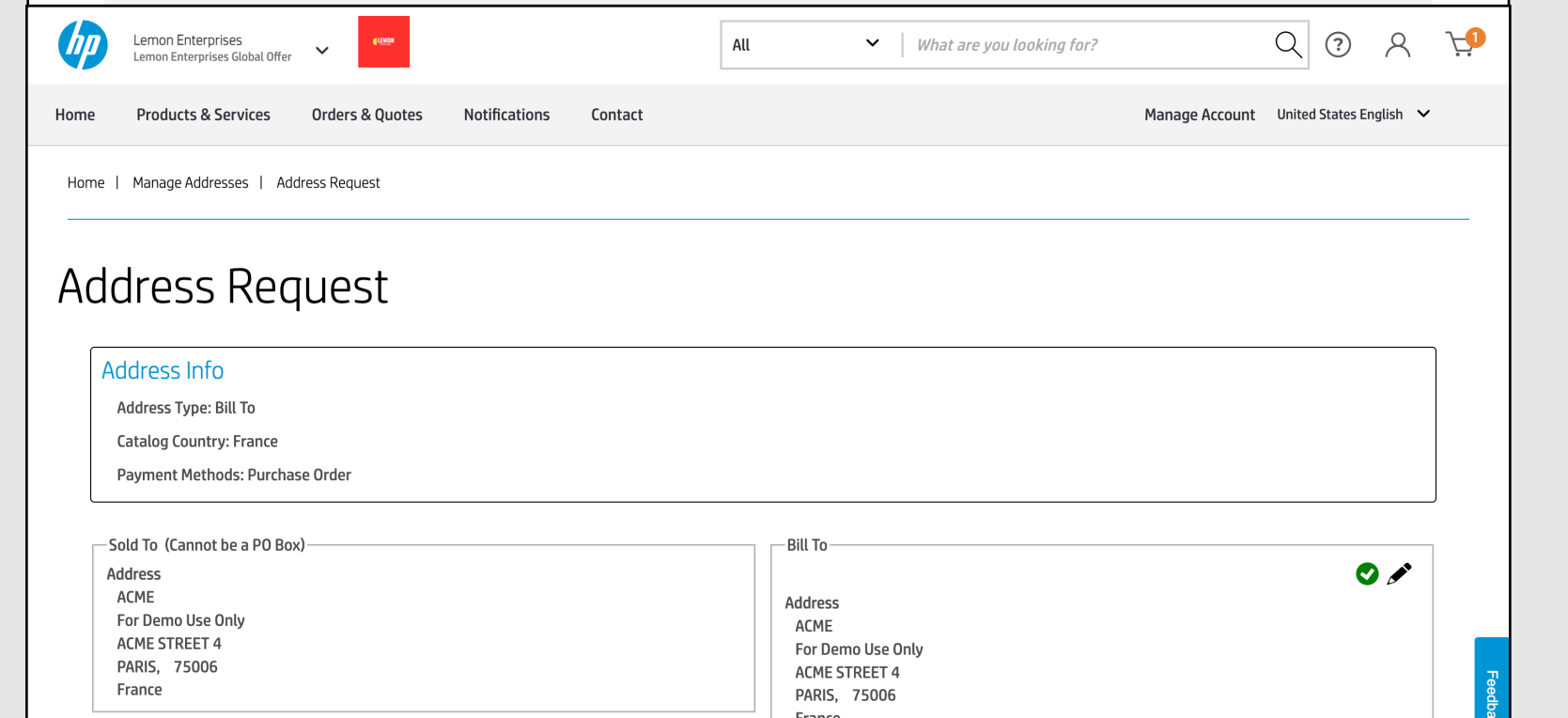
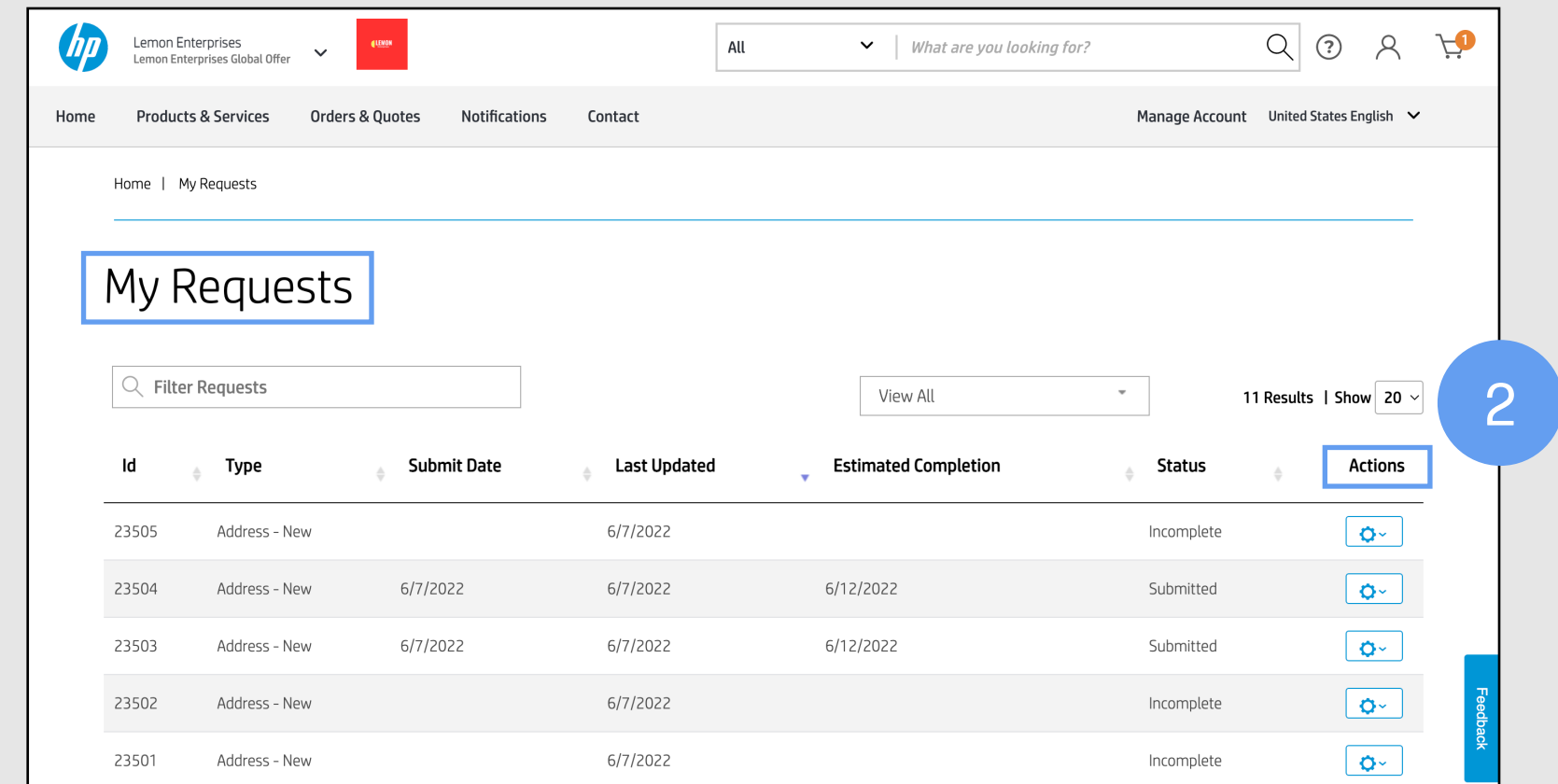
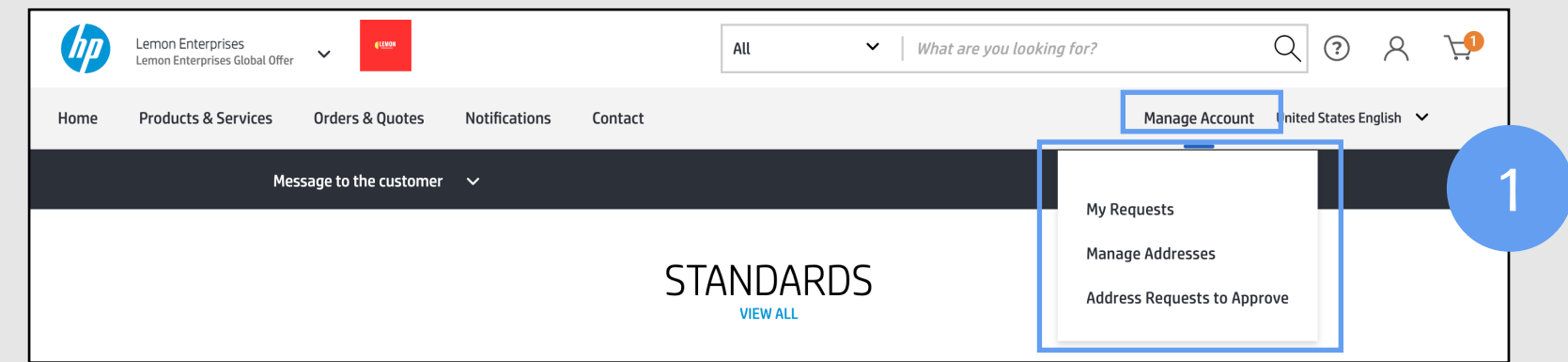
(1) Click on the **“Manage Account”** tab and three options will appear in a drop-down menu:

- **“My requests”**: Allows you to see all address requests you have submitted
- **“Manage Addresses”**: Allows you to manage all addresses
- **“Address Requests to Approve”**: If the HP2B address workflow is enabled, you will see pending address requests coming from other users, which they submitted through the “Address book” feature of HB2B

(2) When you click on “My Requests,” the **“My Requests”** page displays. You can see submitted requests, what type of address requests they are, and their current status.

You can search for a specific request by filtering the list by various attributes, including the status of the request.

Click on the “Actions” icon [  ] to view any request and see its details on the “Address Request” page that appears.





(4) When you click on the second option – “Manage Addresses” - on the drop-down menu from the “Manage Account” tab on the Home Page, you see that you can choose to do a number of actions:

- **“Account Info”**: Click on this to get address information details about any catalogs or organizations selected
- **“Search Options”**: You can search for an address, or filter on address type or payment method
- **“Export all Addresses”**: You can export all addresses to Excel.
- **“Request a New Address”**: You can ask to add a new address
- Click on the **“Change Account Info”** link within the “Account Info” box to see addresses associated with a different organization

The screenshot displays the 'Manage Addresses' interface. At the top, there is a navigation bar with the HP logo, 'Lemon Enterprises', and a search bar. Below this is a secondary navigation bar with links for Home, Products & Services, Orders & Quotes, Notifications, Contact, Manage Account, and United States English. The main heading is 'Manage Addresses'. Below the heading are two buttons: 'Account Info' and 'Change Account Info'. The 'Account Info' section shows 'Organization: C42922-DEMOHP2B\_HP2B\_FR' and 'Catalogs: Portail Demo HP2B, FR'. The 'Search Options' section includes filters for 'Filter by Address Type' (Billing, Shipping) and 'Filter by Payment Method' (Purchase Order). There is also an 'Advanced Search' section with a dropdown menu set to 'All Criteria' and a search input field. On the right side, there are two buttons: 'Export all addresses' and 'Request new address'. Below the search options is a table titled 'Billing Addresses' with one row of data. The table has columns for S4 Contract, Company Name, Address, Attention To, City, State, Country, and Zip Code. At the bottom right of the table is a 'View details' button. A blue circle with the number '4' is located in the top right corner of the screenshot.

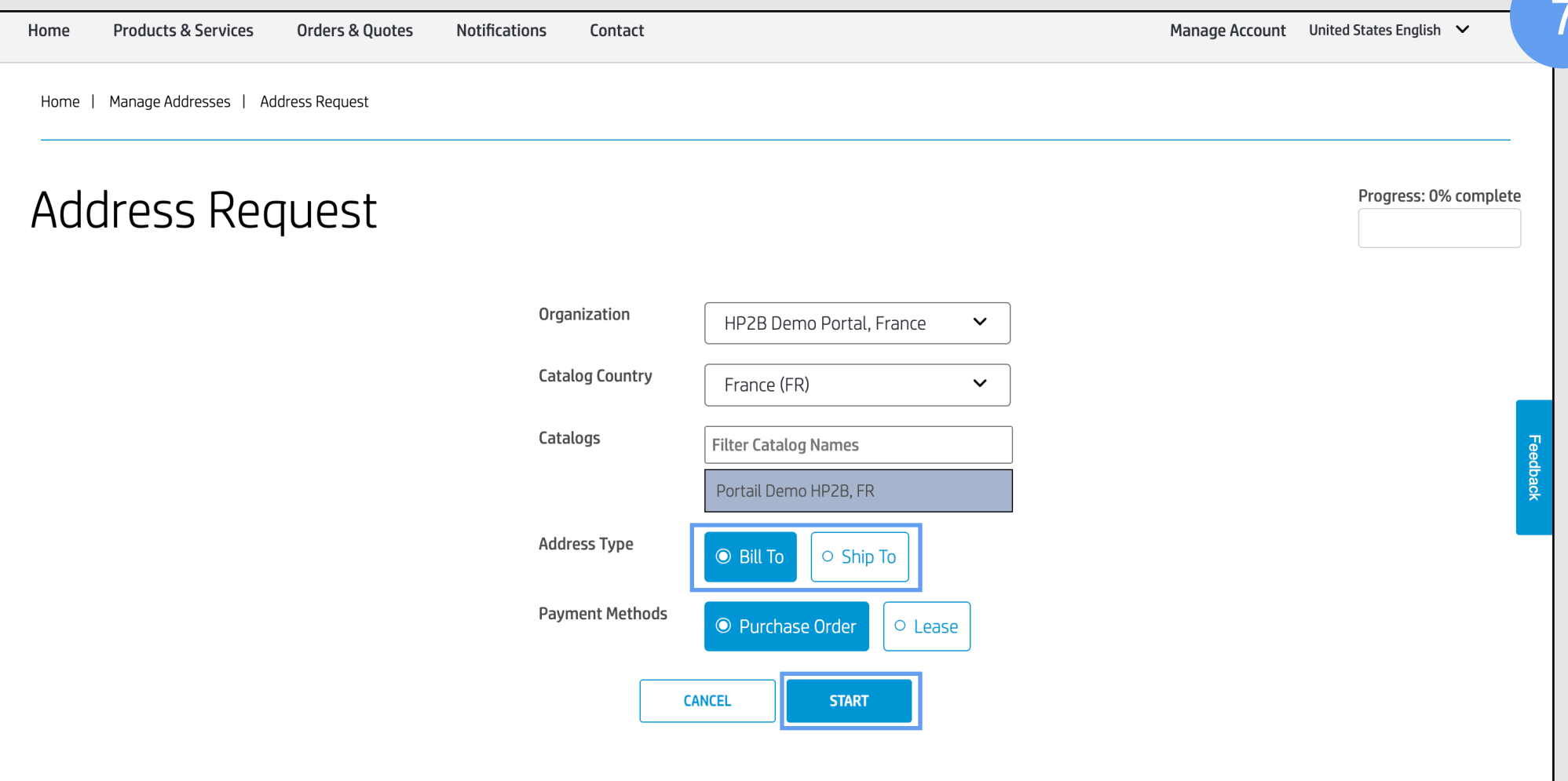
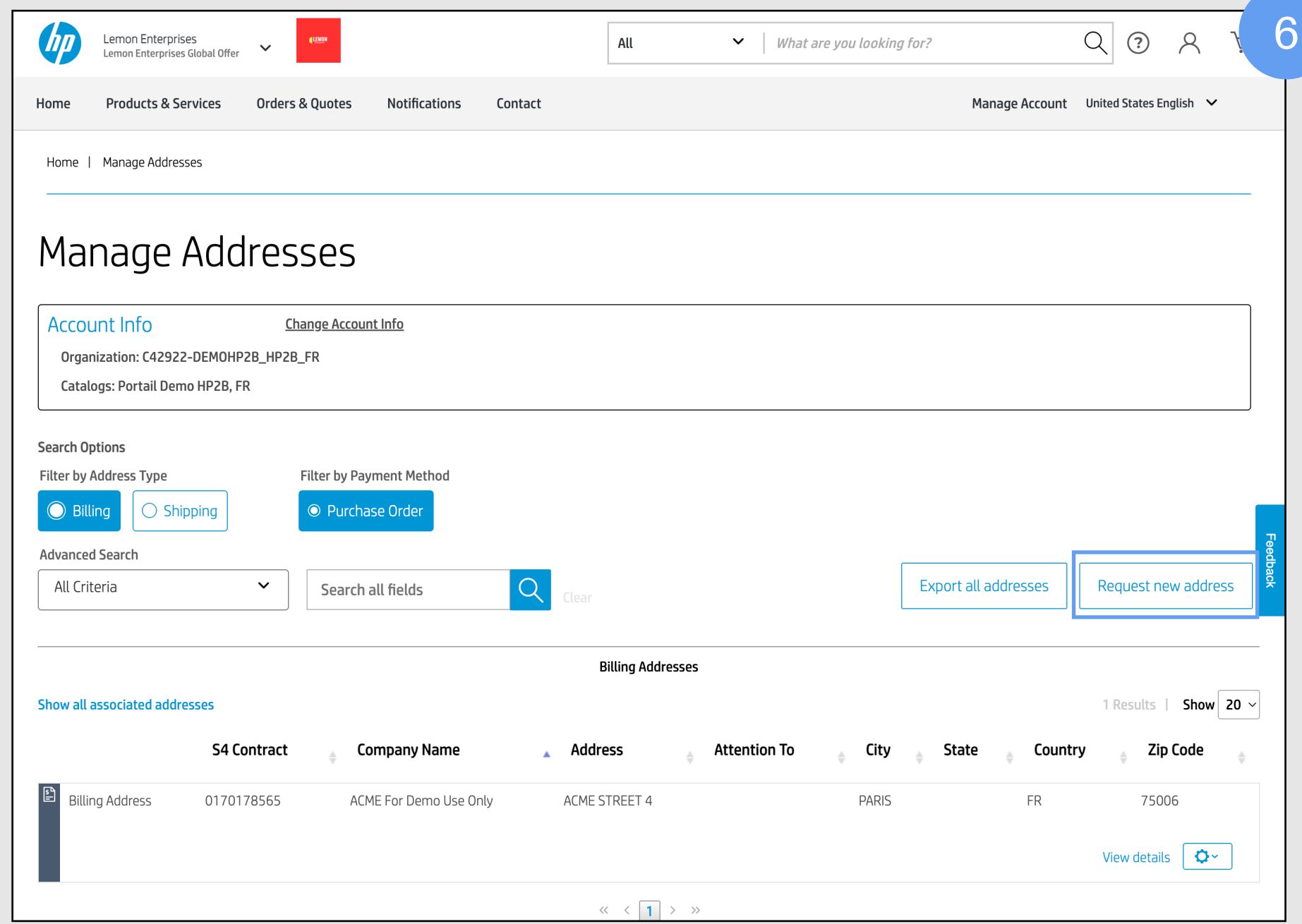
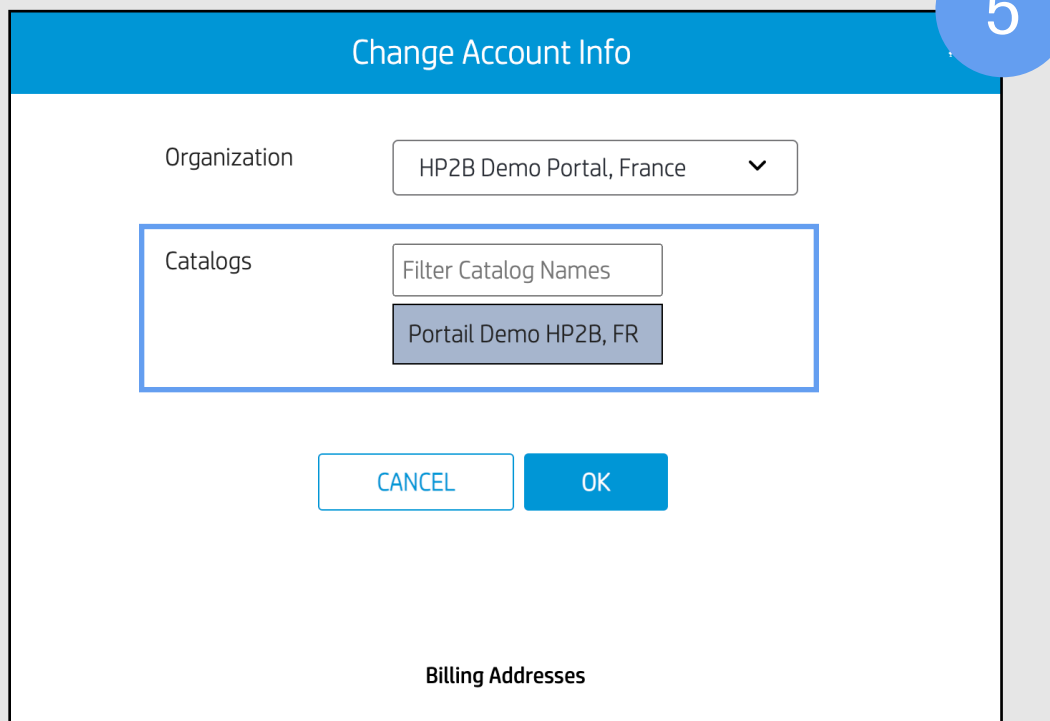
(5) When the “Change Account Info” pop-up screen appears, you can also select any number of catalogs that are associated with that organization.

(6) Going back to the “Manage Addresses” screen, click on “Request new address.”

(7) You will now create a new billing address. You first must select the organization, country, and catalog(s) you want the new address to be associated with.

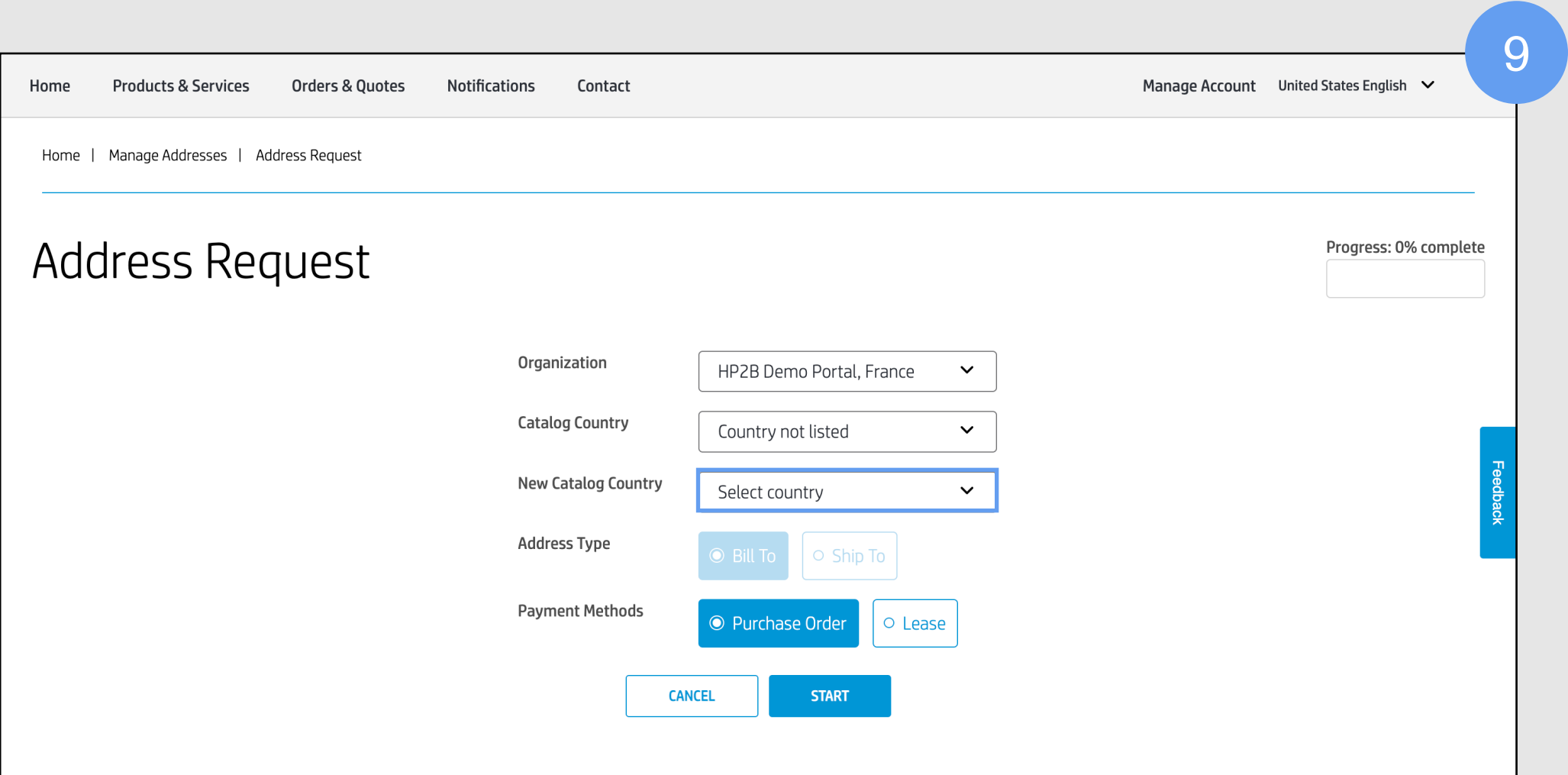
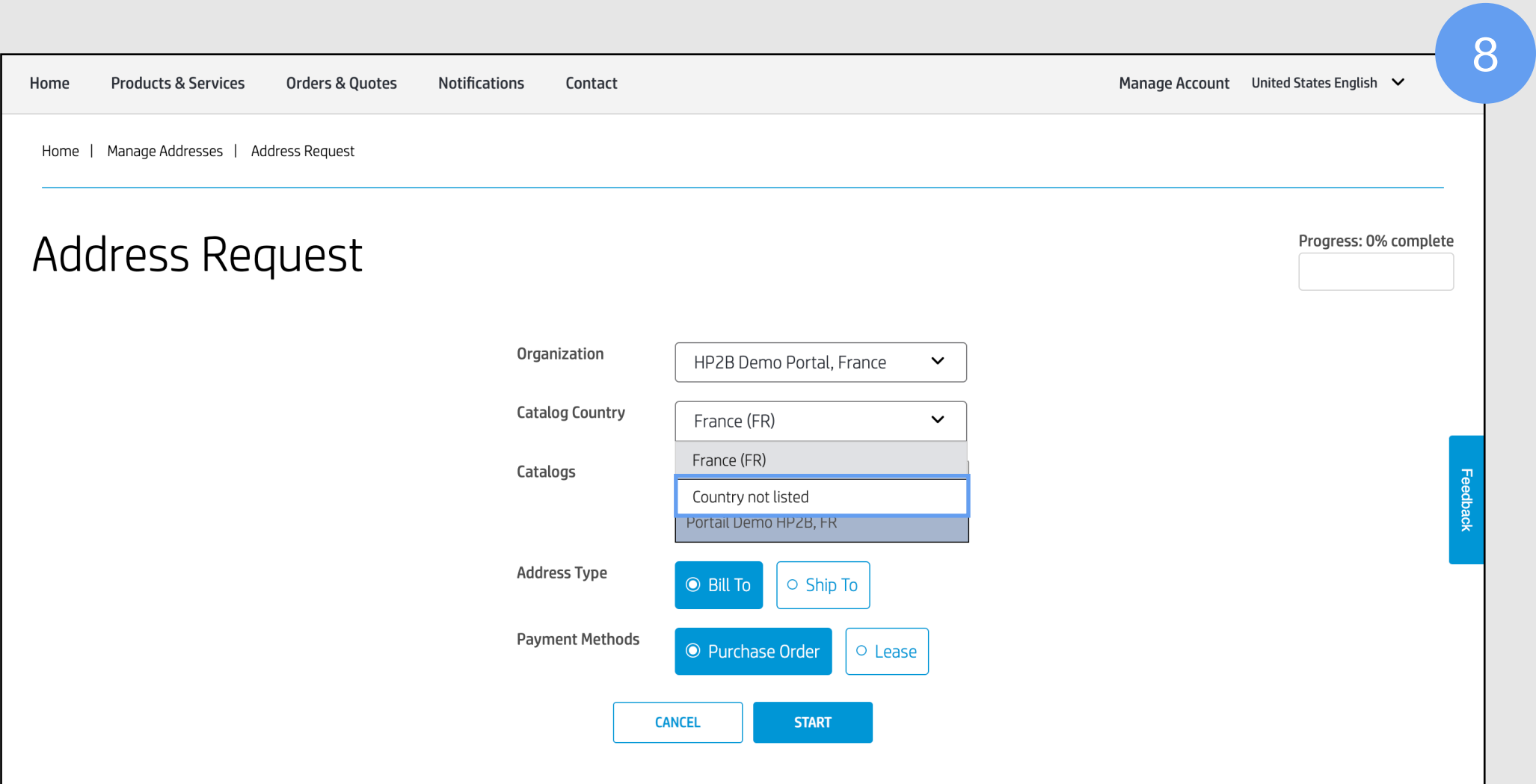
You will then be able to select the type of address you want, “Bill To” or “Ship To.”

To create a new **bill-to** address, you will need to create a new sales contract ID. **Payment Methods** refers to the one associated with that sales contract ID (each sales contract can only have one bill-to address). Once you have completed all the fields, click on “**Start**” to continue.



(8) If you try to select an address for a country that is not listed in the drop-down menu, you will need to click the “**Country not listed**” option.

(9) Then you must select the “**New Catalog Country**” from the drop-down menu.





(10) shows “**address Info**”, containing all the information about the country and payment method you selected.

You can edit any of the five kinds of addresses associated with a Sales Contract ID: sold to, bill to, mail to, ship to, or end customer.

The screenshot displays the HP2B Account Manager interface for an "Address Request". At the top, the HP logo and "Lemon Enterprises" branding are visible. A search bar contains the text "All" and "What are you looking for?". The navigation menu includes "Home", "Products & Services", "Orders & Quotes", "Notifications", "Contact", "Manage Account", and "United States English". The breadcrumb trail shows "Home | Manage Addresses | Address Request".

The main heading is "Address Request" with a progress indicator showing "Progress: 0% complete". Below this is the "Address Info" section, which includes a "Change Address Setup" link and the following details:

- Address Type: Bill To
- Catalog Country: France
- Payment Methods: Purchase Order

Below the "Address Info" section are five address type selection boxes, each with a "Click edit to add" button and a checkmark icon:

- Sold To (Cannot be a PO Box)
- Bill To
- Mail To
- Ship To (Cannot be a PO Box)
- End Customer
- Country Information

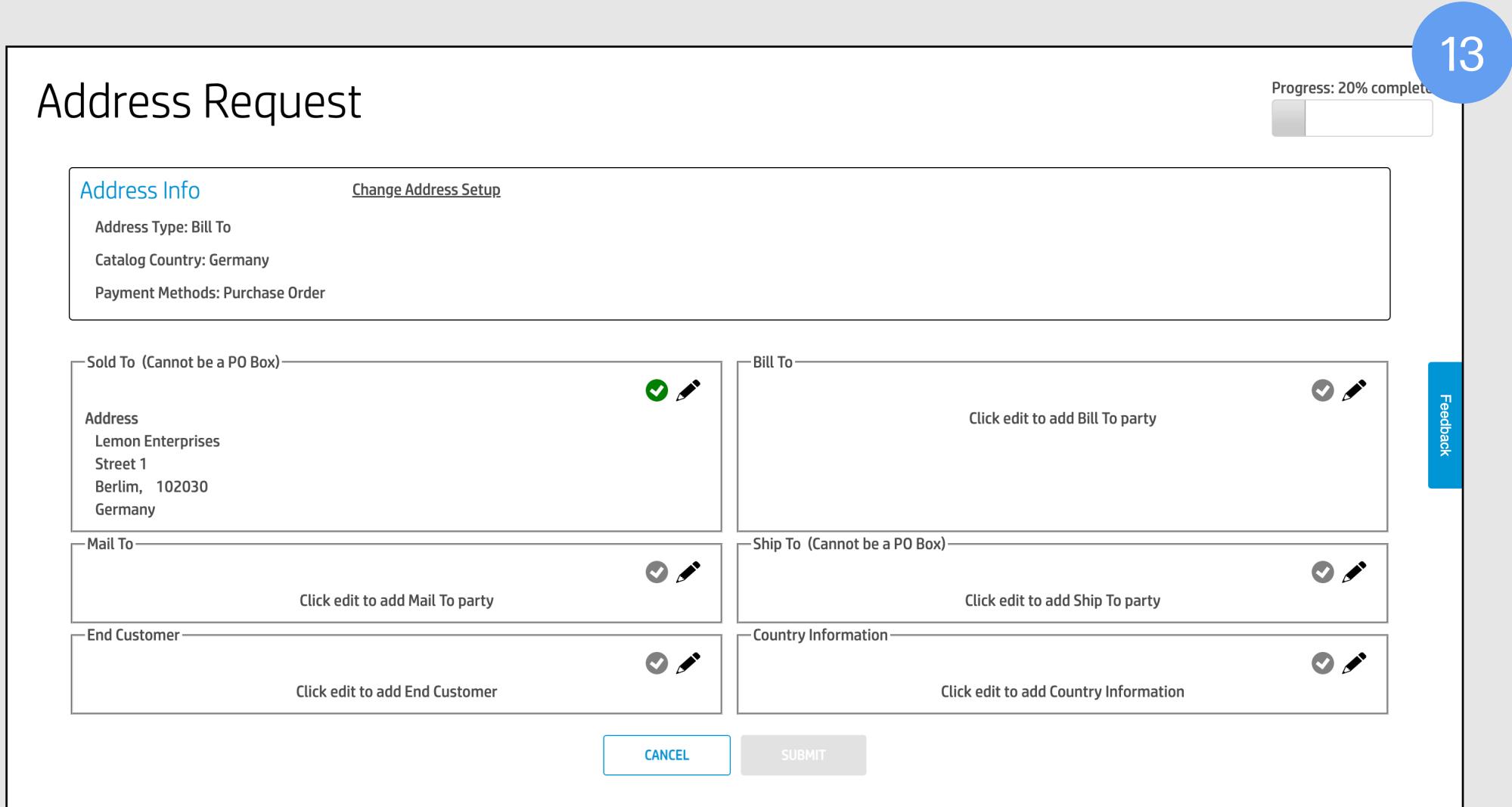
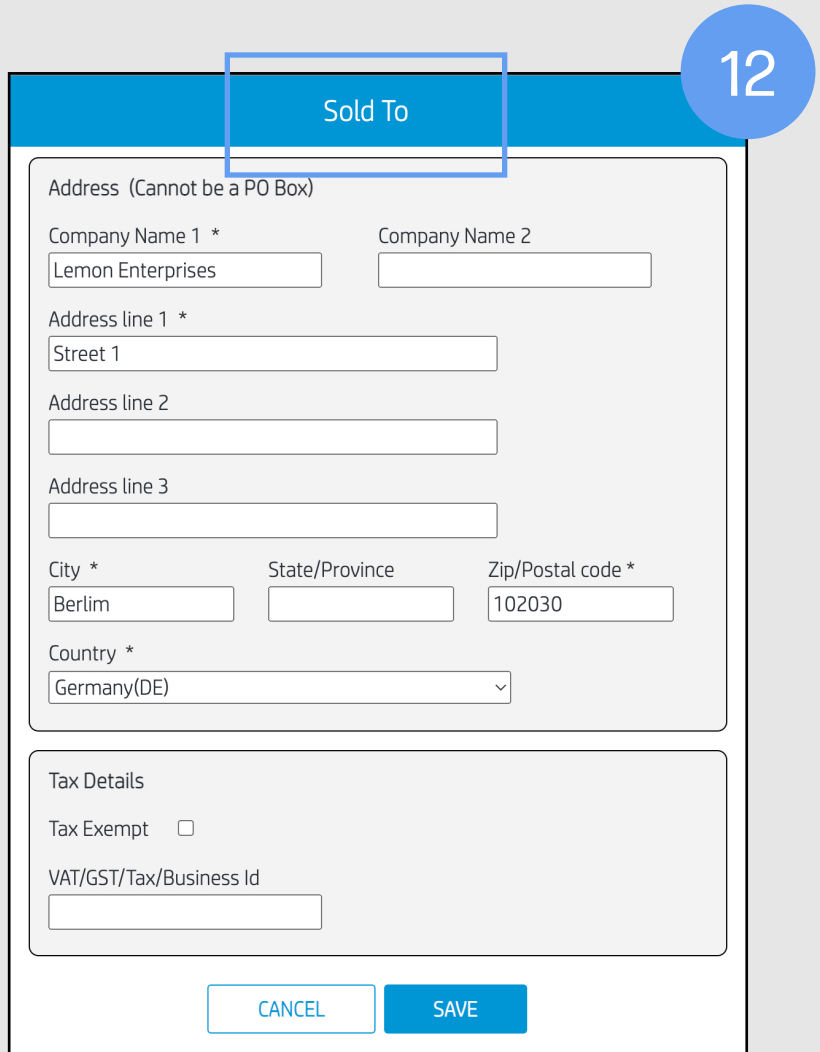
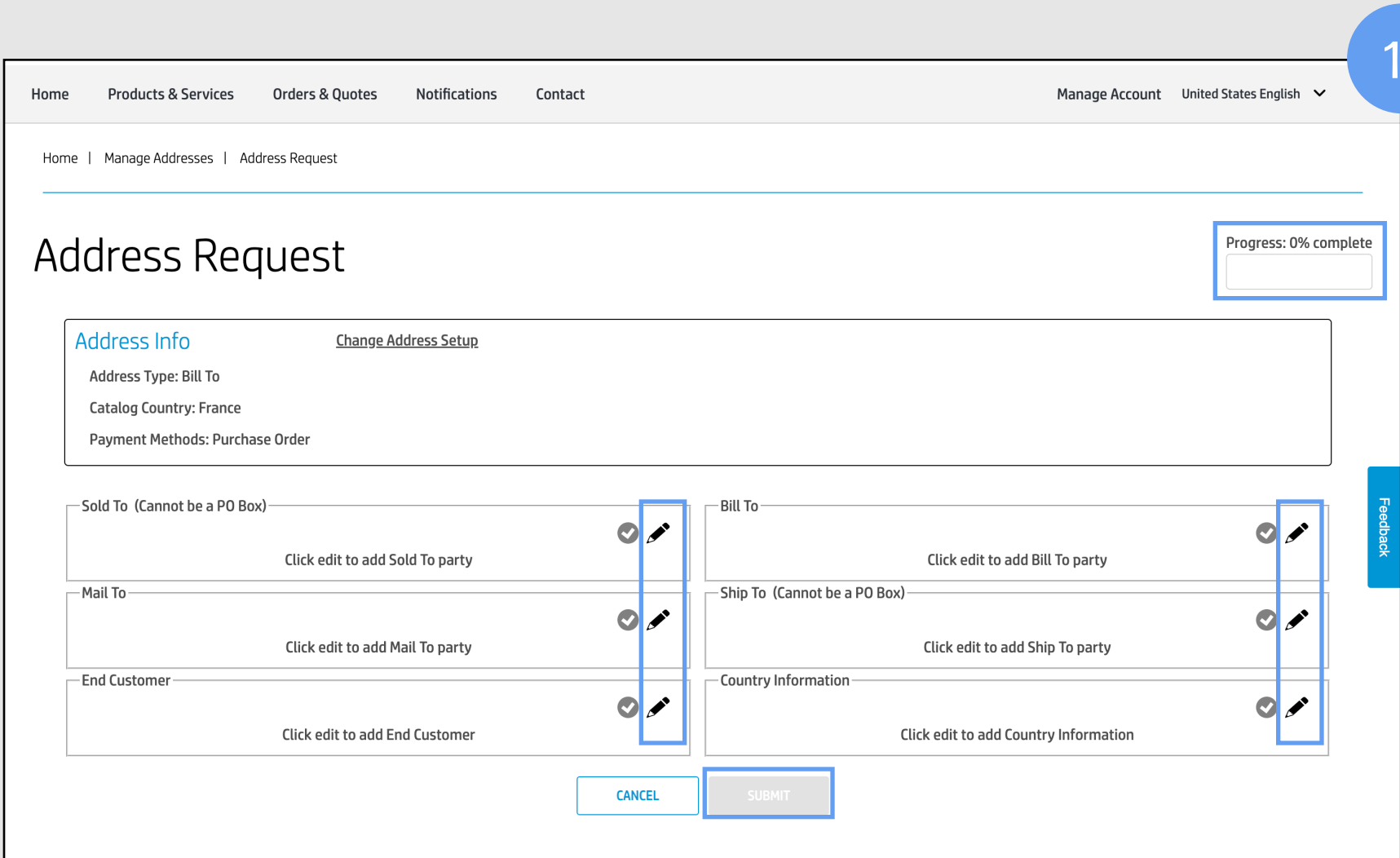
At the bottom of the page are "CANCEL" and "SUBMIT" buttons. A vertical "Feedback" button is located on the right side of the page. A blue circle with the number "10" is positioned in the top right corner of the screenshot.

(11) To fill in or edit any of the sections on this page, click on the pencil icon [ ✎ ] that appears on the right of any section. You can see that there is a section for every type of address: sold to, bill to, ship to, etc.

For now, click on the pencil icon [ ✎ ]for the “Sold to” section and enter your preferred address. Click “Save” when you are done (13).

(12) When you start editing any of the sections on this page (sold to, bill to, mail to, etc.), a pop-up will appear that has the specific form you need to fill out for that type of address.

(13) Once you save the form, details will be available in a corresponding tile (in this example, the “Sold To” tile). A tile is a text box containing important information about an account.



(14) Once the **sold-to** information is filled in, you can easily fill in all the other addresses if they are the same. Just click on the **“Same as sold to address”** to fill all the forms.

For the **end customer**, you can copy the address from the **“Sold To”** or **“Ship To”** sections by ticking the corresponding box.

(15) When the progress bar is 100% complete, you will be able to submit the address by pressing **“Submit.”**

You will get a request reference ID and the request will be visible in the **“My Requests”** page.

(16) If **“Address Requests to Approve”** is enabled, you can approve/reject the address requests coming in from other users.

To activate this capability, contact your HP Representative.

Thank you!

End Customer

Address

Company Name 1 \*      Company Name 2

Address line 1 \*

Address line 2

Address line 3      PO Box

City \*      State/Province      Zip/Postal code \*

Country \*

Germany(DE)

Same as sold to address

Same as ship to address

CANCEL      SAVE

Address Request

Progress: 100% complete

Address Info      Change Address Setup

Sold To (Cannot be a PO Box)      Bill To

Mail To      Ship To (Cannot be a PO Box)

End Customer      Country Information

CANCEL      SUBMIT

Address Requests to Approve

Filter Requests

0 Results | Show 20

Id	Type	Last Updated	Initiator	Actions
No requests found for this organization.				



# Glossary

## Address

You can enter up to five addresses for any one sales contract: sold-to, bill-to, mail-to, ship-to, or end customer address. These can all be the same, or they can each be different.

## Sales contract ID

Each billing address you enter is attached to a sales contract, and each one has its own ID number. A sales contract can only have one billing address, although it can have as many of the other kinds of addresses as you like.

## Account manager

An account manager is a category of user assigned by your HP Representative. Account managers can manage addresses centrally across multiple catalogs, and can approve, edit, or reject address requests in workflows.

## 1 What can account managers do that other types of users can't?

Account managers can manage addresses centrally across multiple catalogs, and can approve, edit, or reject address requests in workflows.

## 2 Can I have the account manager role?

Yes, but your HP Representative is the only person who can designate a user as an account manager.

## 3 What can you do on the "Manage Addresses" page?

- View or change account info: Get address information details about any catalogs or organizations selected
- Search for addresses: You can search for an address, or filter on address type or payment method
- Export addresses: You can export all addresses to Excel
- Request a new address: You can ask to add a new address

## 4 What are the five types of addresses used in HP2B?

Sold to, bill to, mail to, ship to, and end customer.

## 5 How many bill-to addresses can be associated with a sales contract ID?

Just one billing address is attached to each sales contract ID. However, you can have as many of the other types of addresses attached to a sales contract ID as you want.

