HP2B My Account & Address Book

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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 with most of the "My account" and "Address book" features. These capabilities help you use HP2B effectively and efficiently.

My account

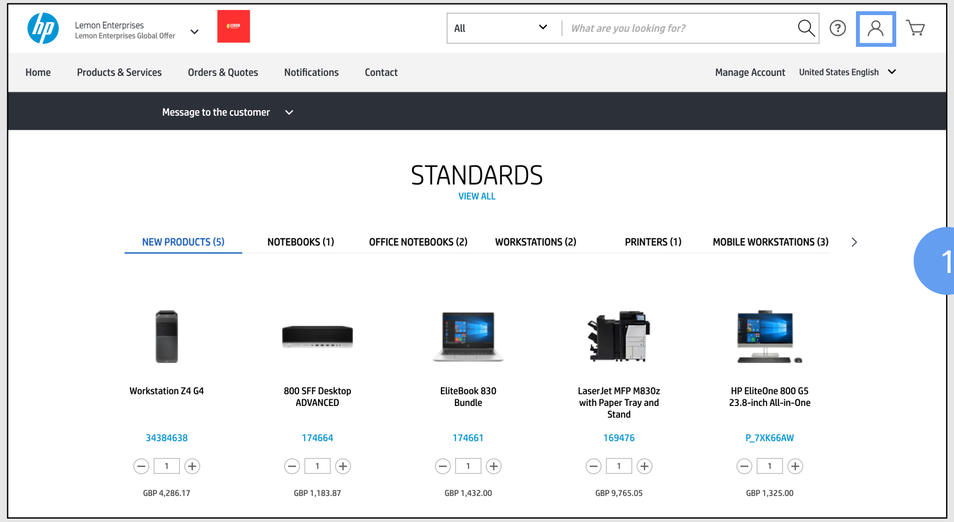
My account

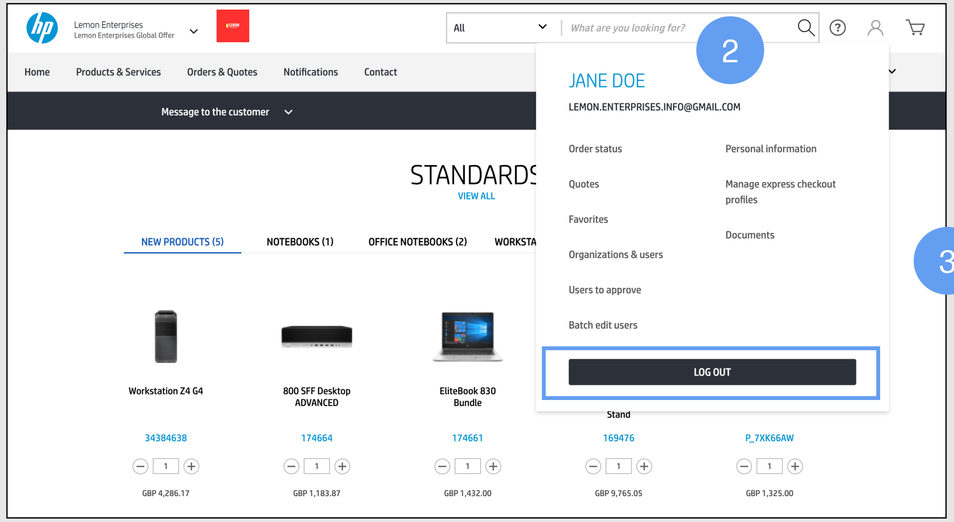
(1) The “My account” icon [ ] at the top right of the Home Page is where you will find all the information related to your HP2B account.

(2) When you hover over the “My account” icon [ ], you get a drop-down menu where you can access a variety of information and functions: order status, quotes, favorites, personal information, and more. You can choose any of these options by clicking on it directly. For example, clicking on “Favorites” would take you right to the “Favorites” page.

Important: The items on this drop-down menu **will differ depending on what role you were assigned by your customer administrator** when first getting access to HP2B. It will also reflect your activities within HP2B. For example, if you haven’t established any favorites, then “Favorites” will not appear on the drop-down menu.

(3) Clicking on “My account” is also how you log out of HP2B – by clicking on the last option on the drop-down menu, “Log out.”





My account

(4) If you **click on (rather than hover over)** the “My account” icon [ ], the “Account summary” page appears, which gives you an expanded list of options to pursue. Again, which specific options you see, and in which order, depends on the user status you were assigned when you registered with HP2B. In this example, the user is a **customer administrator,** which gives them special rights.

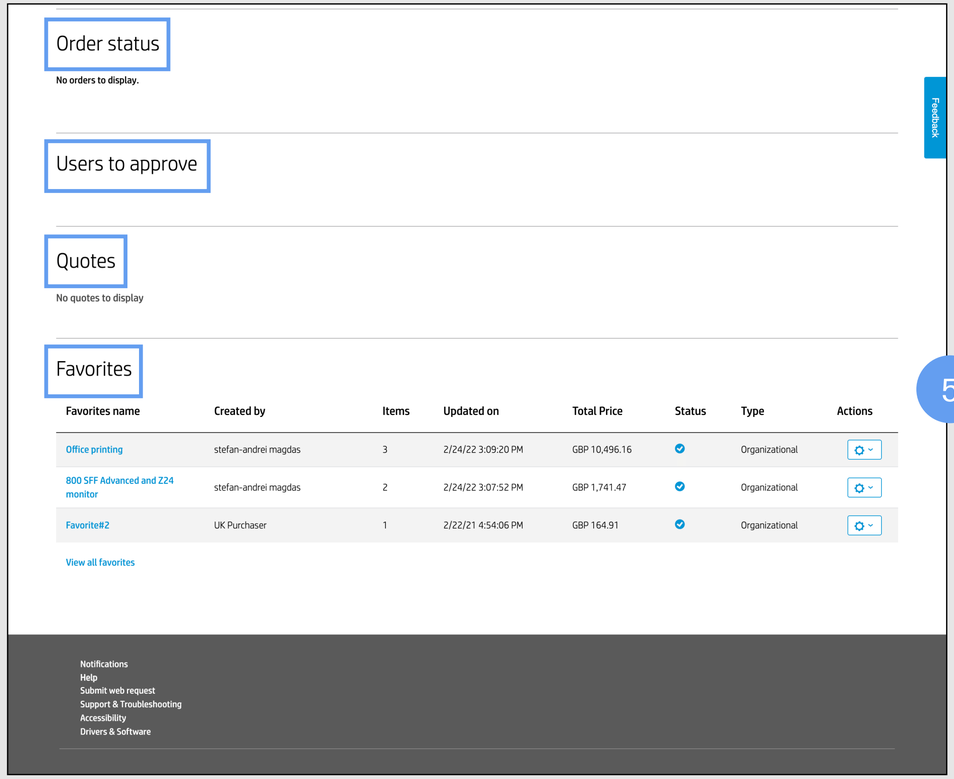
(5) Here are some of the options that can be displayed from clicking on “My accounts.”

- “Order status” lists your orders and where they currently are in the HP2B system, or you can search a specific order via “Advanced search”

NOTE: you will not see the “Advanced search” link unless you have been authorized with the “advanced order search” capability. If you have questions, ask your customer administrator

- “Users to approve” will only appear in customer administrators’ accounts and will show users who have registered and for whom final access approval is needed

- “Purchase requests to approve” will only show up in **accounts of users in purchaser roles**



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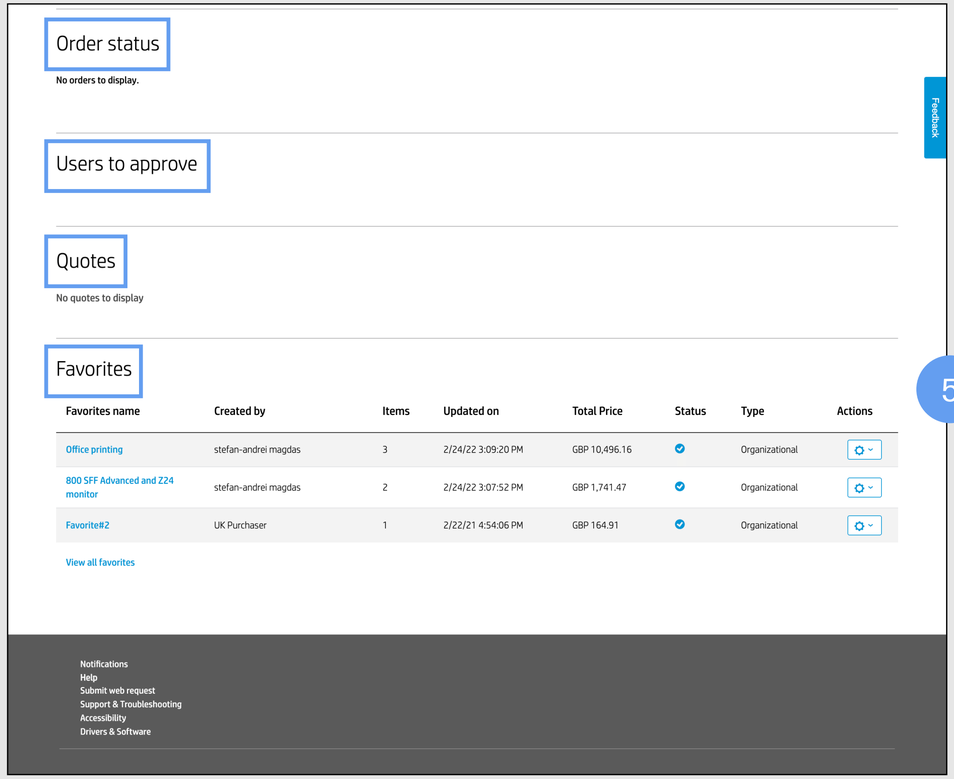
My account

- “Quotes” will list all the **quotes you have created**
- “Favorites” will display any favorites you have created
- “Manage express checkout profiles” allows you to **change or delete your express checkout profiles**



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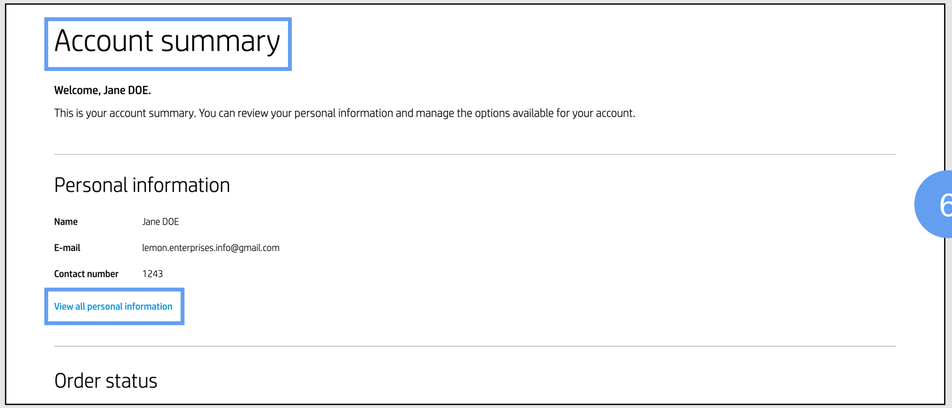
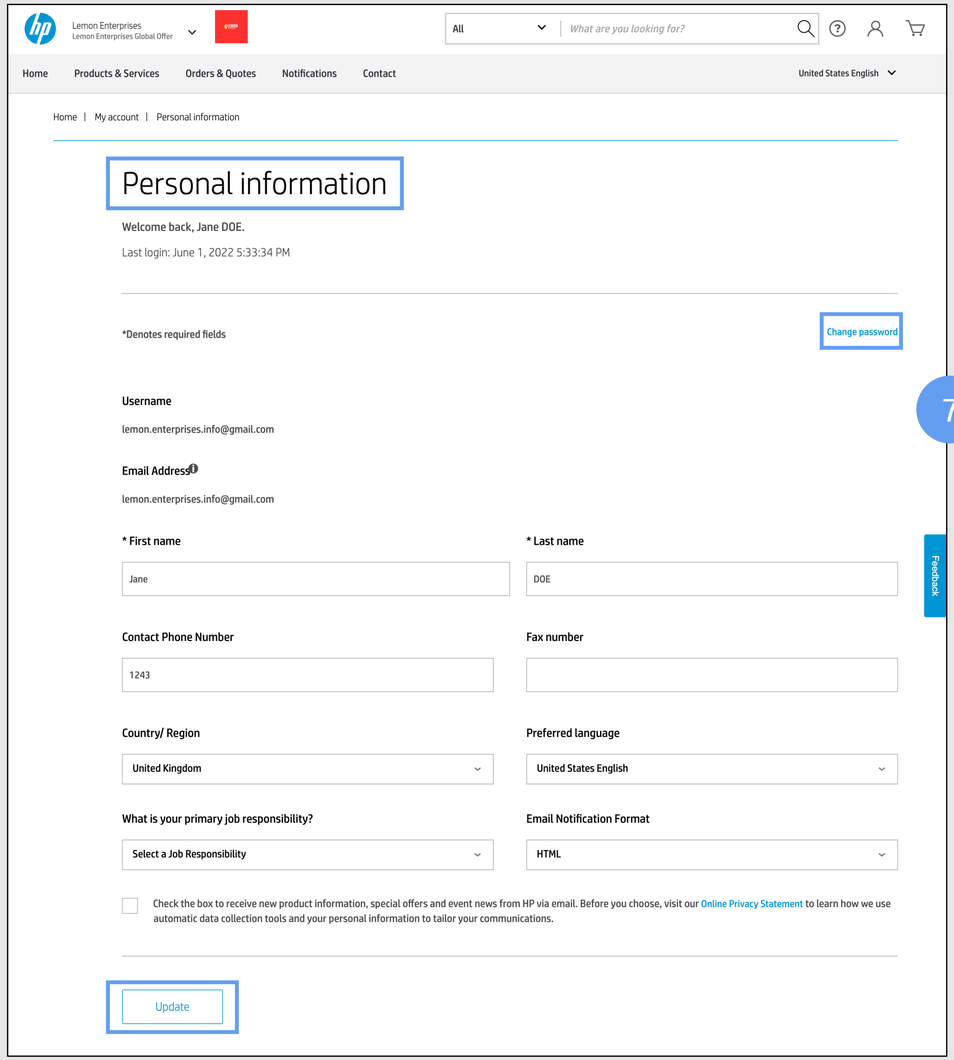
My account

(6) Let’s look at what happens when you examine your “Personal information,” which displays your name, email, and contact number on the “Account summary” page. Notice the link, “View all personal information” at the bottom of this section. You click on this to view or change any of your personal information.



My account

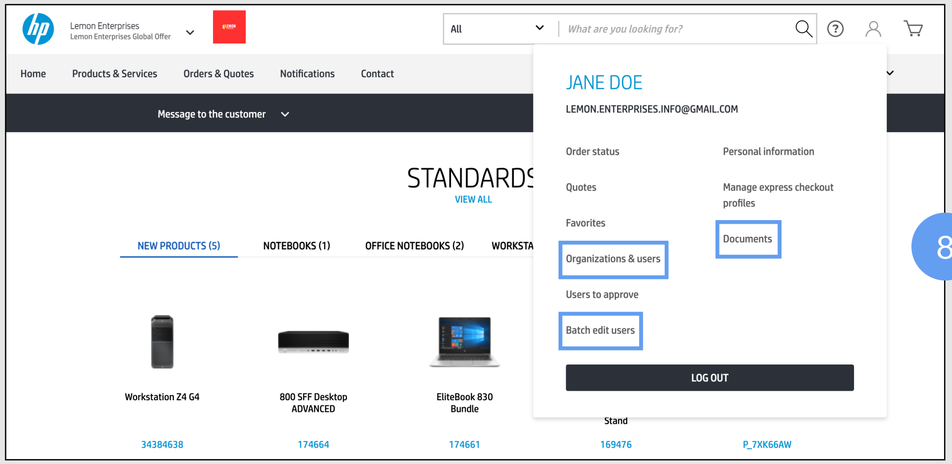
(7) When you click on “View all personal information,” the “Personal information” screen will appear. You can change any of the personal data you had previously entered into HP2B – then click “Update” at the bottom of the screen.



My account

(8) If you go back to the “Account summary” page, **depending on the role assigned to you,** you may have some or all of the following options as well:

- Click on “Organizations and users” **to give access to other users. This option is only available to the customer administrator**
- “Batch edit users” allows the customer administrator (only) to **edit other users’ access rights**
- “Browsing history” gives you a list of all the places within HP2B you visited
- “Documents” will take users to any documents – Word, Excel, PDF, or other – **they have stored in HP2B** (Documents can only be added to your catalog by HP. If you have any questions, contact your HP Administrator)



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Address book

Overview

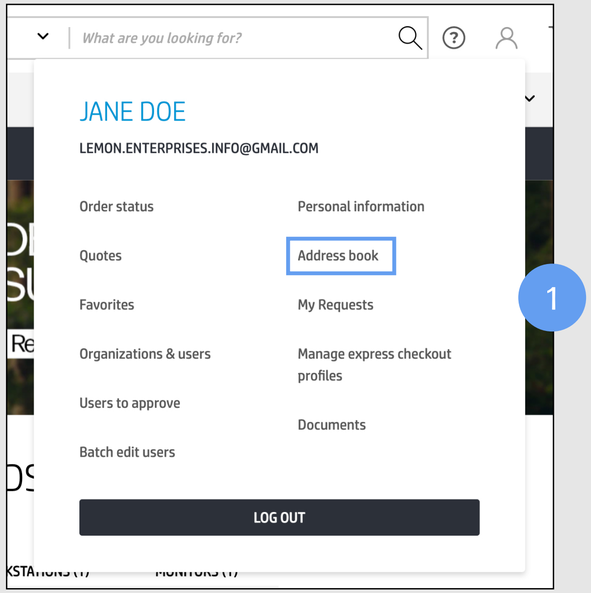
You will find the address book is one of the options listed when you mouse over the “My account” icon [ ].

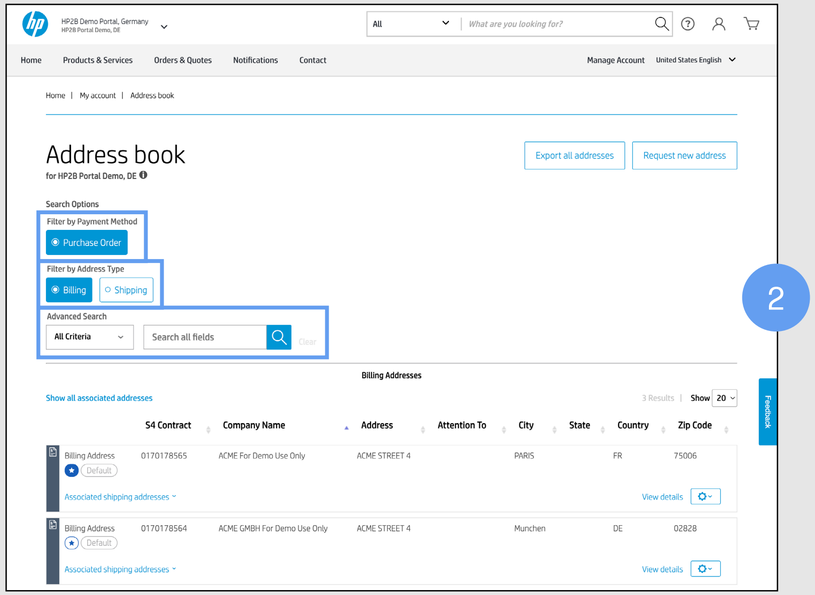
(1) The address book contains all the addresses associated with a specific catalog.

(2) Click on the “Address book” link to display the “Address book” page, where your current addresses are listed.

To make addresses easy to find, HP2B allows you to filter them **by payment method or address type.**

If you have been authorized to use the “advanced order search” capability, an “Advanced search” link will be displayed. Clicking on this allows you to **search using address, city, or ZIP code.** If you have not been authorized, **no link will display.** Ask your HP Representative if you would like this capability.





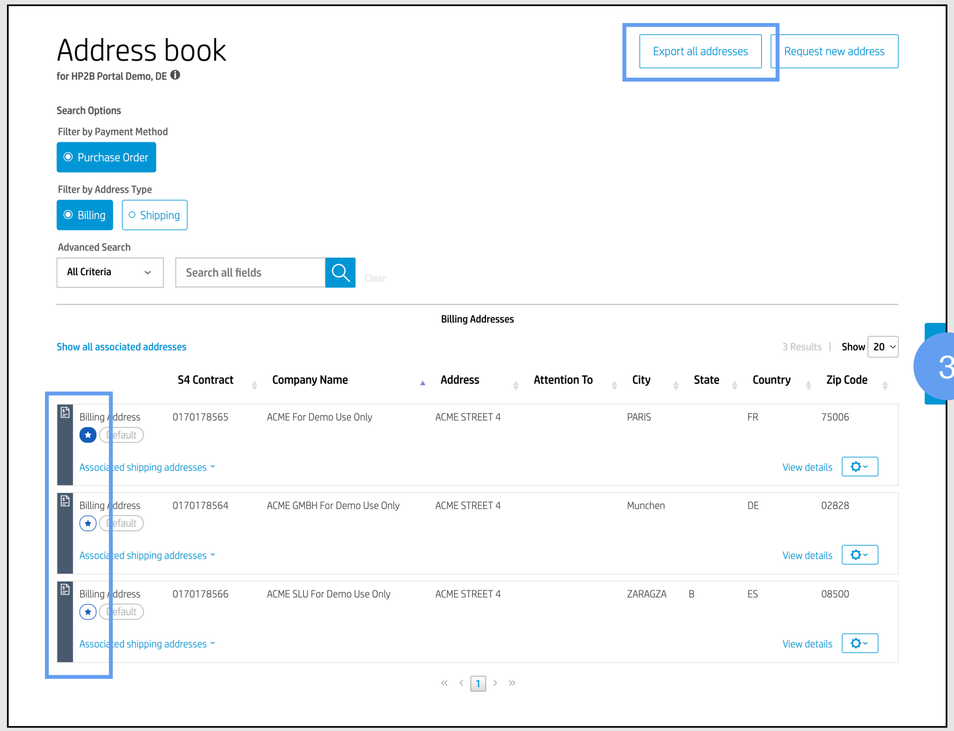
Overview

(3) Additionally, you can click on the star [★] next to the address to establish that address as a favorite.

You can set up to 10 favorites per catalog, and they will display in the order they were chosen – that is, the first address you designate as a favorite will be at the top of the list when you check out, the second below that, the third below that, and so on.

Remember, favorites are set by catalog. You can choose to select as favorite one address in Catalog A, but can choose not to select the same address as a favorite in Catalog B.

You can also export all addresses to Excel by clicking on the link at the top right.



Adding a new address

You have five types of addresses in HP2B:

- Sold to
- Bill to
- Mail to
- Ship to
- End customer

You can request a new address of any kind to be entered into the address book at any time.

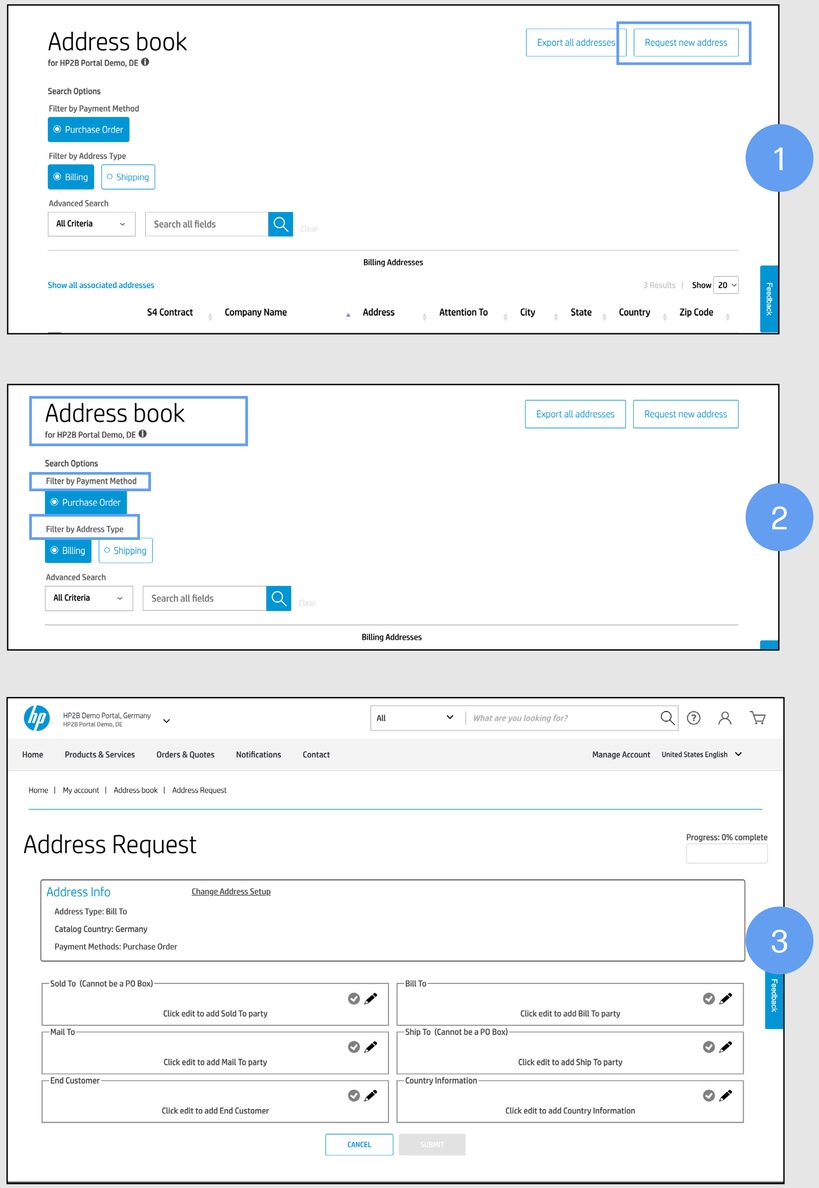
(1) First, access your “Account summary” and click on “Address book.” Then, click on the “Request new address” button at the top right.

(2) The “Address request” page will appear, with buttons that allow you to select the kind of address and the payment that you want.

Let’s walk through how to create a new bill-to address using a PO.

(3) When you click on “Bill To” to add a new billing address, you will trigger an HP2B process for creating a sales contract ID for that address. **Each new billing address you add has a sales contract ID assigned to it.** Any one billing address – and therefore, any sales contract ID – can have multiple shipping addresses associated with it, however.

The next thing you do is designate a payment method for that sales contract ID.

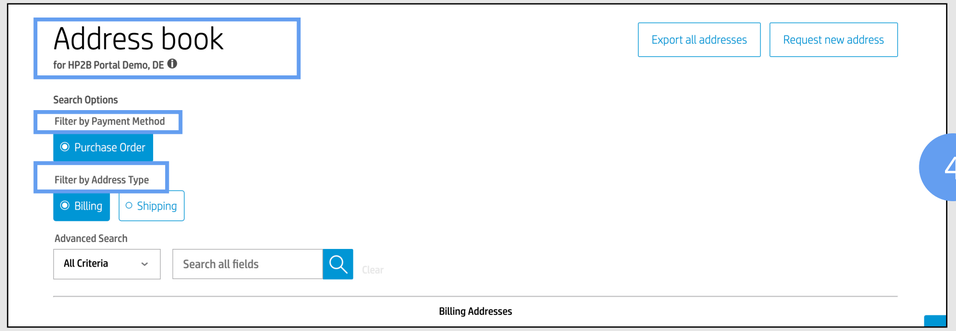


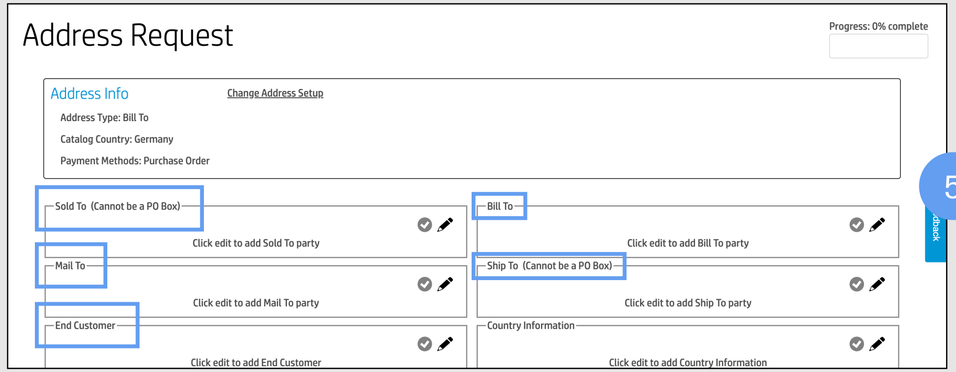
Adding a new address

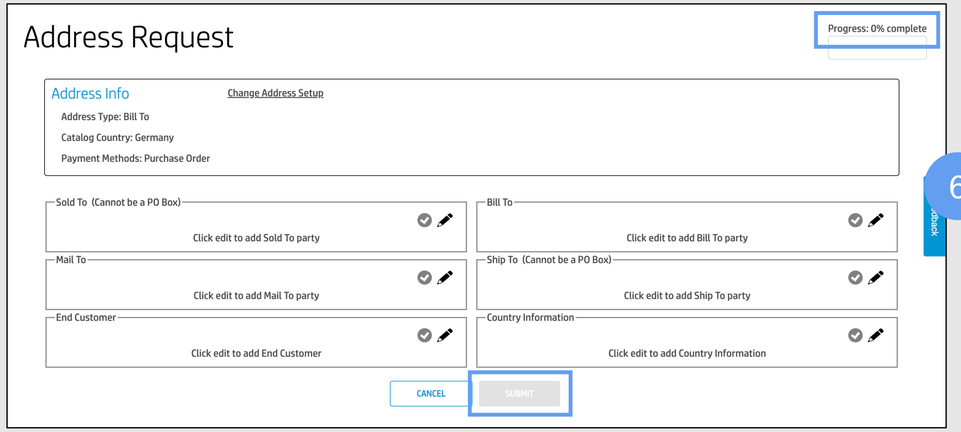
(4) Select “Bill To” and “Purchase Order,” then click “Start.”

(5) A new page will appear that displays the **address request form,** which is prepopulated with information from the catalog.

(6) Note that the “submit” button at the bottom of the page is “greyed out” (inactive). It will remain this way until the “Progress” bar on the upper right side of the page is complete. This is to guarantee all required information for this page is complete.





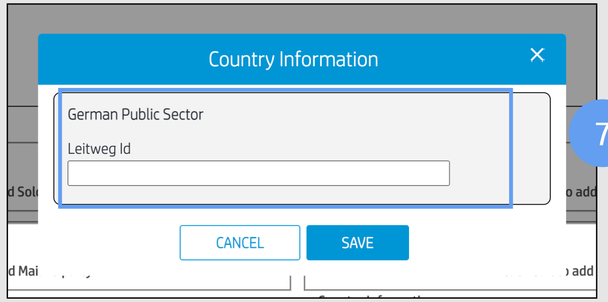


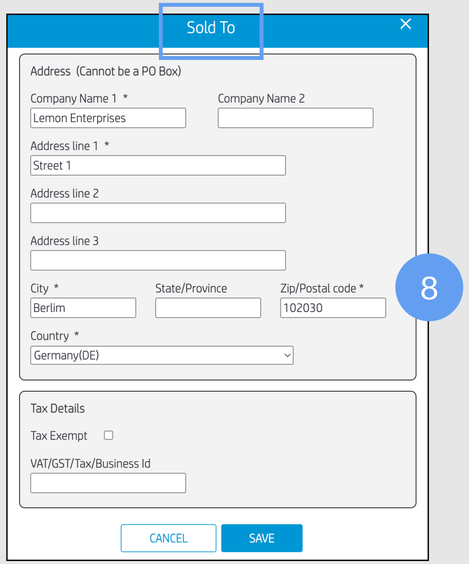
Adding a new address

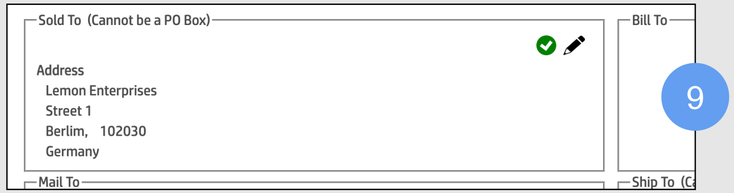
(7) For some of the countries (for example, Germany) there is a sixth section that requires country-specific data to be filled in. This will pop up automatically if it affects your account.

(8) When editing any of the sections (“Sold To,” “Bill To,” “Mail To,” etc.), a pop-up window will display with a form that needs to be filled in for that address. Below see what appears when you click on “Sold To.”

(9) Once the form is saved, you can see the details in a corresponding window (in this case, the “Sold To” address).



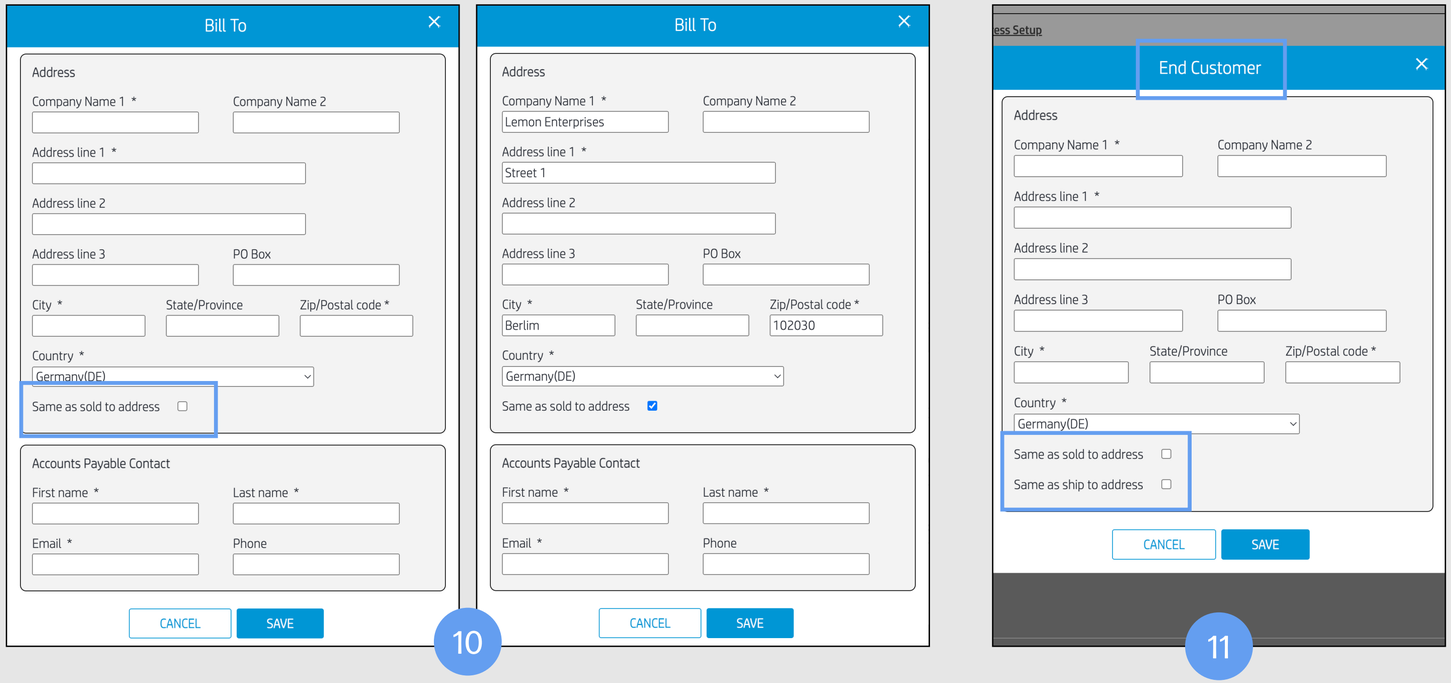




Adding a new address

(10) You can save a lot of time if all the addresses associated with a particular contract ID are the same. For example, once you have completed all the fields in the “Sold To” form, you can click on the “Same as sold to address” box for any other address, and have the required form automatically filled in.

(11) For the **end customer,** you also have the option to make it the same as the ship-to address. Just click on the corresponding box.

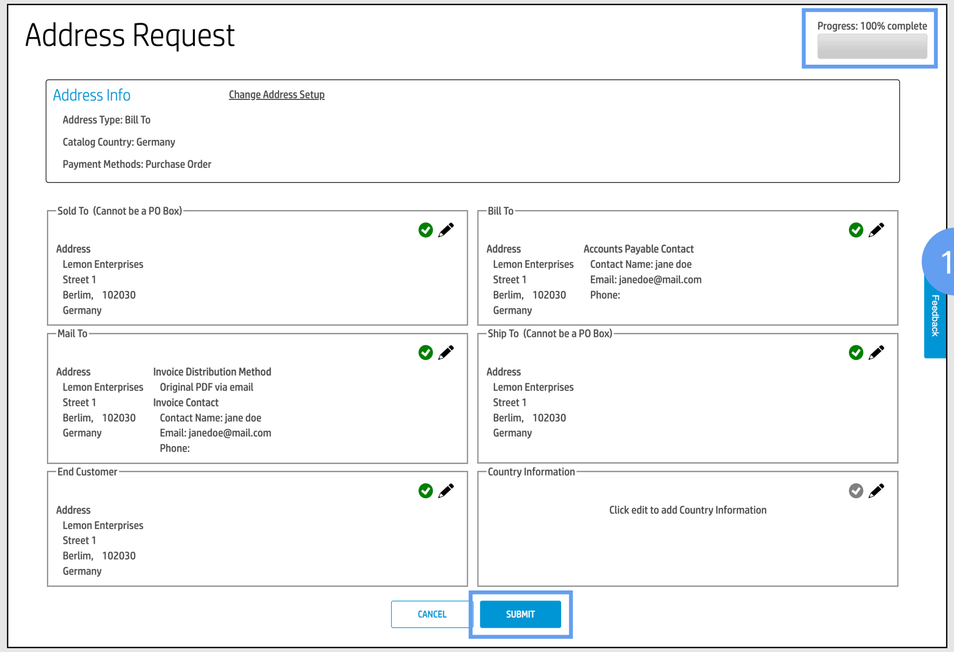


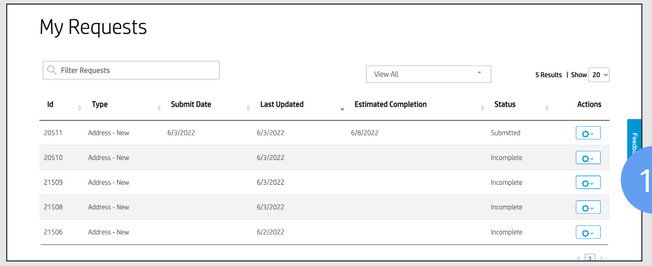
Adding a new address

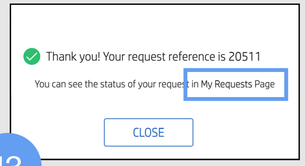
(12) When you get the message “Progress 100% complete,” you will be able to click “Submit” to add the address.

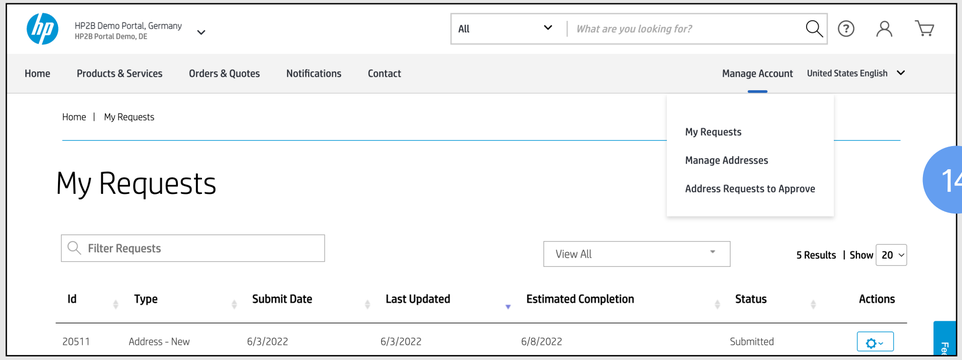
(13) You will get a **request reference ID** and the request will be visible in the “**My Requests” page.**

(14) Click on T he “My Requests” page to display it. It will show all your address change requests.









Billing addresses

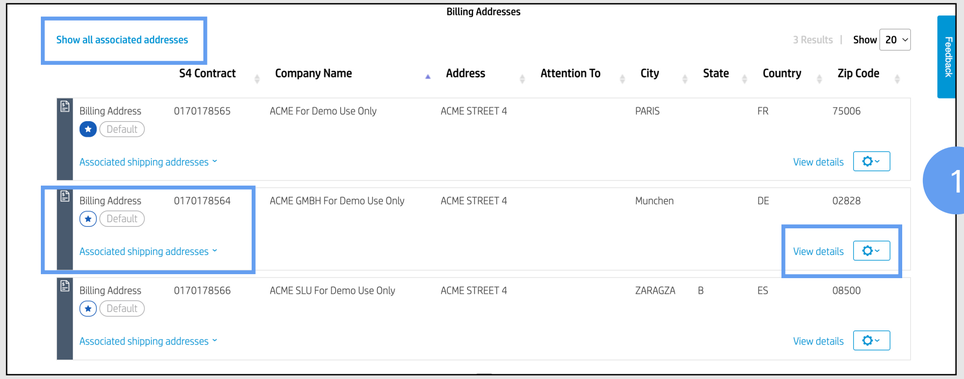
Show ship-to addresses

Ship-to addresses are hidden by default. Clicking on **“Show all associated addresses”** will display all bill-to and ship-to addresses available for the catalog.

You can set up **default addresses** from this section.

To see details of a particular address, click on **“View details”** to the left and below any address you want. This also allows you to edit or delete the address through a drop-down menu.

By clicking on **“Associated shipping addresses”** below the star [★], you can see all ship-to addresses associated with that particular billing address. Or, you can click on “Show all associated addresses” to display all addresses associated with your various billing addresses.



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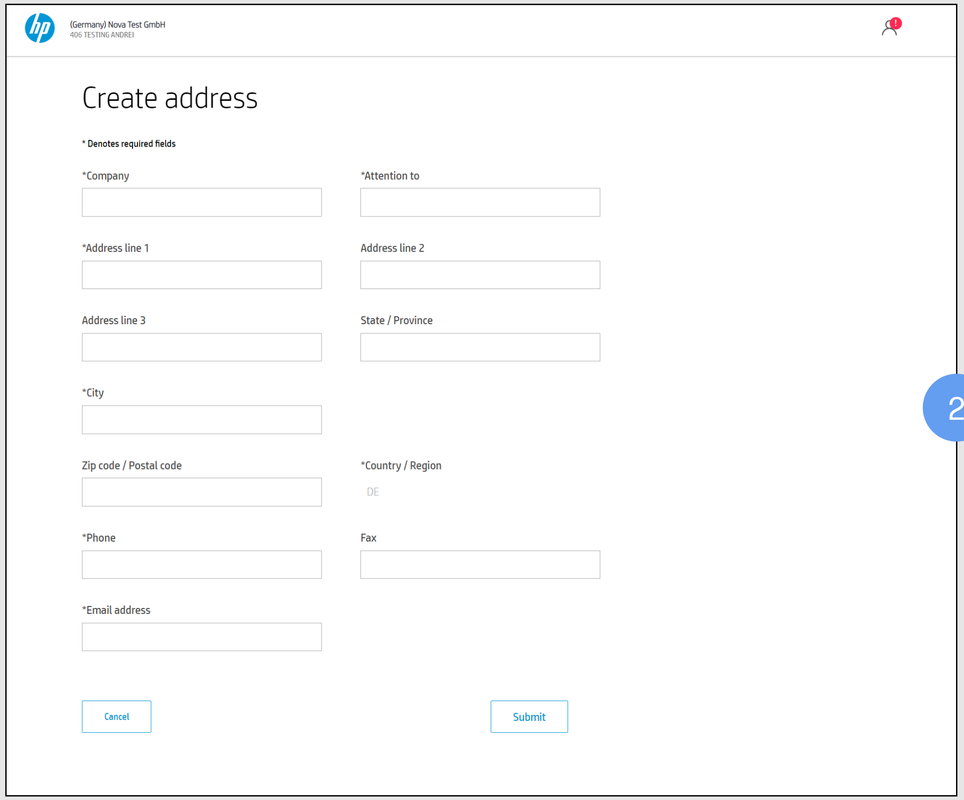

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Address book management

Address book management

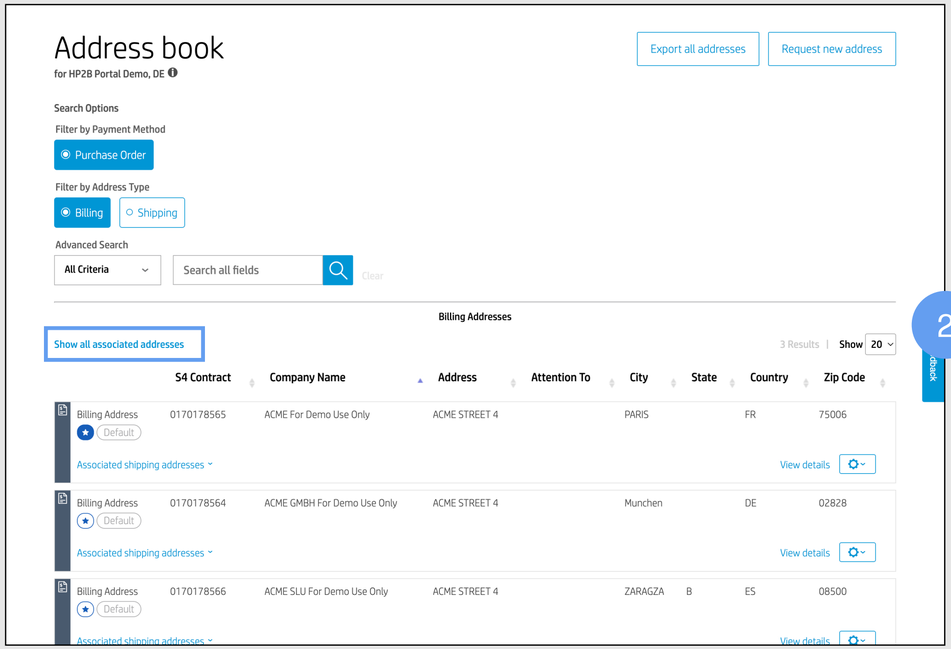
Managing your address book so that all addresses – of all types – are up to date used to be done manually, and only by contacting HP. Now you have the self-serve capability to do it all yourself. The result: point-and-click address changes that are done instantly, without waiting days for manual processes and approvals.

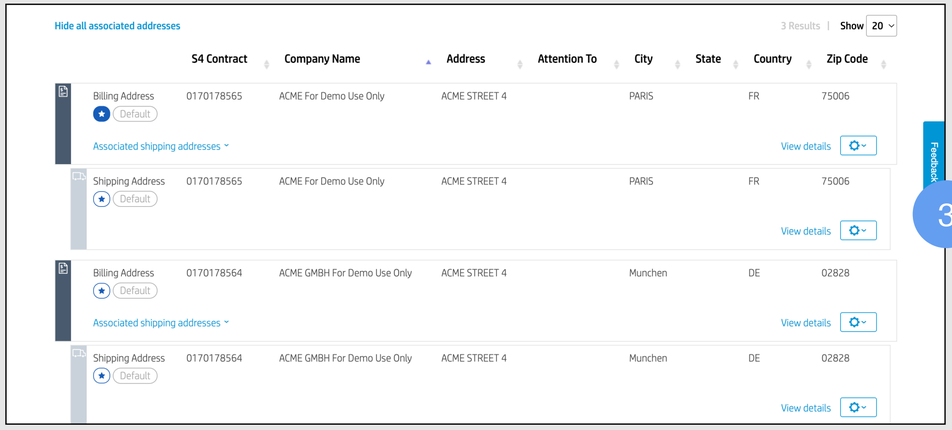
We will now show you how to manage your address book, to keep it accurate and up to date.

(1) Ship-to addresses are hidden by default. When you navigate back to the “Address book” page via the “My account” icon [ ], you will again see this screen.

(2) Click on **“Show all associated addresses”** to display all your bill-to and ship-to addresses available for a given catalog.

(3) If you want to hide the ship-to addresses, click on the “Hide all associated addresses.” Only the bill-to addresses will display.

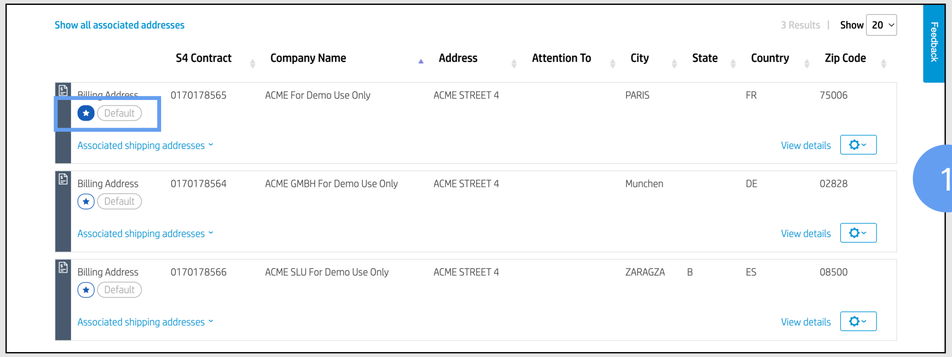


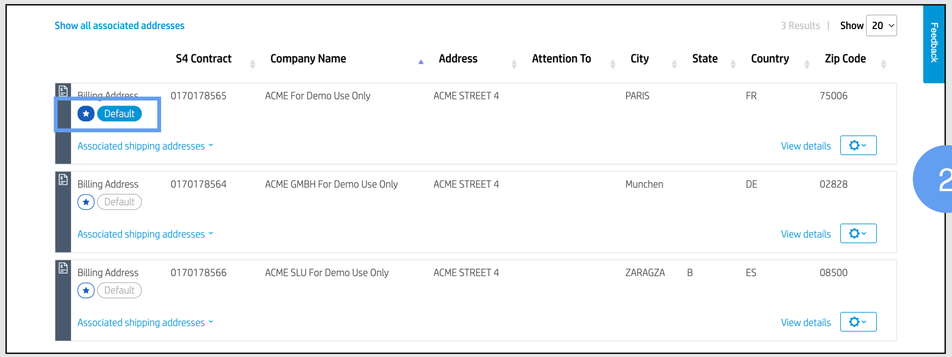


Default addresses

(1) Clicking on **“Default”** will set an address as default in checkout.

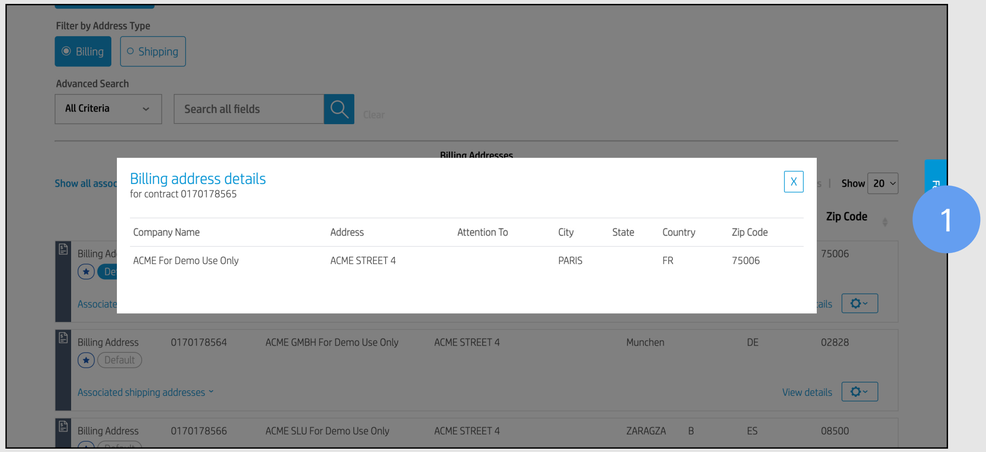
(2) To remove the address as default, simply click the **“Default” button again.**





Address details

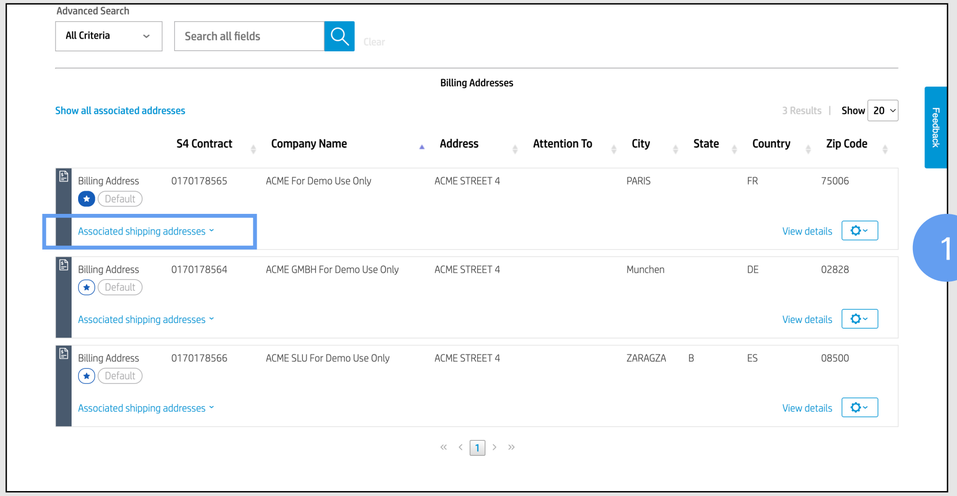
(1) To view the details of any billing address, just click on it. A pop-up window will display more information about the address.

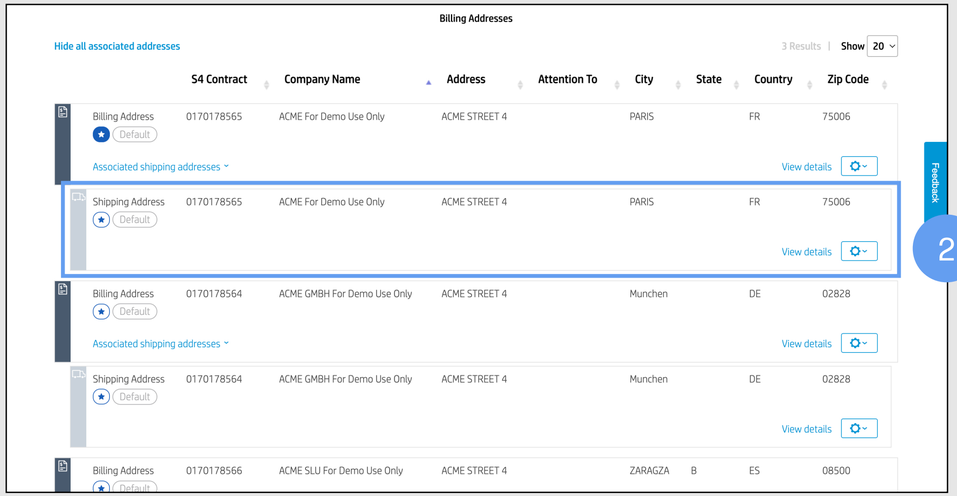


Associated shipping addresses

(1) To see the shipping addresses associated with any billing address, click on “Show all associated addresses” on the left side of the address text.

(2) The associated addresses will display below the billing address.





Glossary

Glossary

Address book

This is the section of HP2B where all your addresses are stored. There are four types of addresses: sold to, bill to, mail to, ship to, and end customer. They can overlap, or be grouped however you like. You access the address book from the “My account” icon [ ] at the top right of the Home Page.

Favorite addresses

You can designate multiple addresses as “Favorites” and they will appear at the top of your address list in the order they were chosen.

Default addresses

These addresses will prepopulate on various forms – such as POs, billing forms, or shipping forms – as you move through the HP2B lifecycle.

Sales contract ID

This is a unique number that is assigned every time you create a new address for HP2B. It is used to help HP manage addresses for each catalog.

FAQ

FAQ

1 Where does the “My account” icon [ ] take you?

Clicking on the “My account” icon [ ] takes you to a drop-down menu where you can perform numerous actions related to HP2B, such as check the status of orders, view quotes, view favorites, or manage addresses.

2 When can you add or change an address?

You can add or change addresses at any time by going to the “My account” icon and clicking on “Addresses.” You can even add addresses on the fly while on the “Checkout” page.

3 What are the five types of addresses you can have in HP2B?

- Sold to
- Bill to
- Mail to
- Ship to
- End customer

4 Why can’t I start using my new billing address immediately?

The HP2B system needs time to create or update the sales contract ID. It’-s not an immediate action.

HP2B