MyCSI Global
User Guide

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1. MyCSI Fundamentals

1.1 MyCSI

MyCSI is CSI Leasing's Customer Portal and online asset information system. Here you will find everything you need to know about your leased assets. Customers can view all equipment on a particular schedule or perform a detailed search for equipment in a particular location.

Among the information in MyCSI is: Master Lease and Schedule number, lease start and end date, manufacturer and model number, serial number, equipment location and rental amount. MyCSI also allows users to enter up to 11 customer defined fields for intra-company use.

1.2 MyCSI Benefits

Some of the benefits of MyCSI include:

- Freedom to access equipment and schedule detail anytime, anywhere
- Customer Defined Fields providing company-specific information down to the asset level
- Multiple logins with several user roles and services permissions based on company needs
- Ability to manage end-of-lease equipment returns, buyouts, and extensions/renewals on an individual asset basis
- Approval workflow and change history on assets
- PDF copies of invoices and other lease documents (as available)

1.3 Basic Definitions

mySchedules – A list of schedules that are assigned to a user. Users with appropriate permissions can view Schedule details, perform searches, or export information.

myAssets – A list of assets that are associated with a specific schedule. Users can view asset details, perform searches or export information. Users with additional permissions can edit customer data, request CSI to change details such as equipment locations, or submit assets for return or a purchase.

myInvoices – A list of invoices going back 120 days. Users with appropriate permissions can view invoice details such as assets and individual rental amounts.

myTransactions – Users with appropriate permissions will have access to this feature and will be able to manage pending transactions and view historical information for all transactions.

myAdministration – For users with adminstration permissions functions include managing user access and permissions, email templates, and customer defined field labels.

Customer Defined Field (CDF) – Fields available for the user to add company-specific information to each asset. Users with appropriate permissions can define the fields, request changes to data or approve requested changes.

Key CDF – A field that allows adminstrators to limit access of other users to records based on the value of the Key CDF.

1.4 Log in

Log into MyCSI from any computer with Internet access. The URL is: http://mycsi.csileasing.com/

As a new user, an email will be sent with username and password from either a CSI MyCSI administrator or your local MyCSI administrator. As a new first time user, you will be required to accept the **CSI Terms of Use** before continuing.

If you forget your password, please contact your local administrator for assistance.

Note: When logging into MyCSI for the first time, a Welcome message is displayed. The message can be closed by selecting the ***x*** in the upper right corner. Closing the message prevents it from redisplaying the next time the user logs in.

1.5 Change Password

Users can change their password at any time. To change your password, select the *Change Password* option from the dropdown menu that is your username.

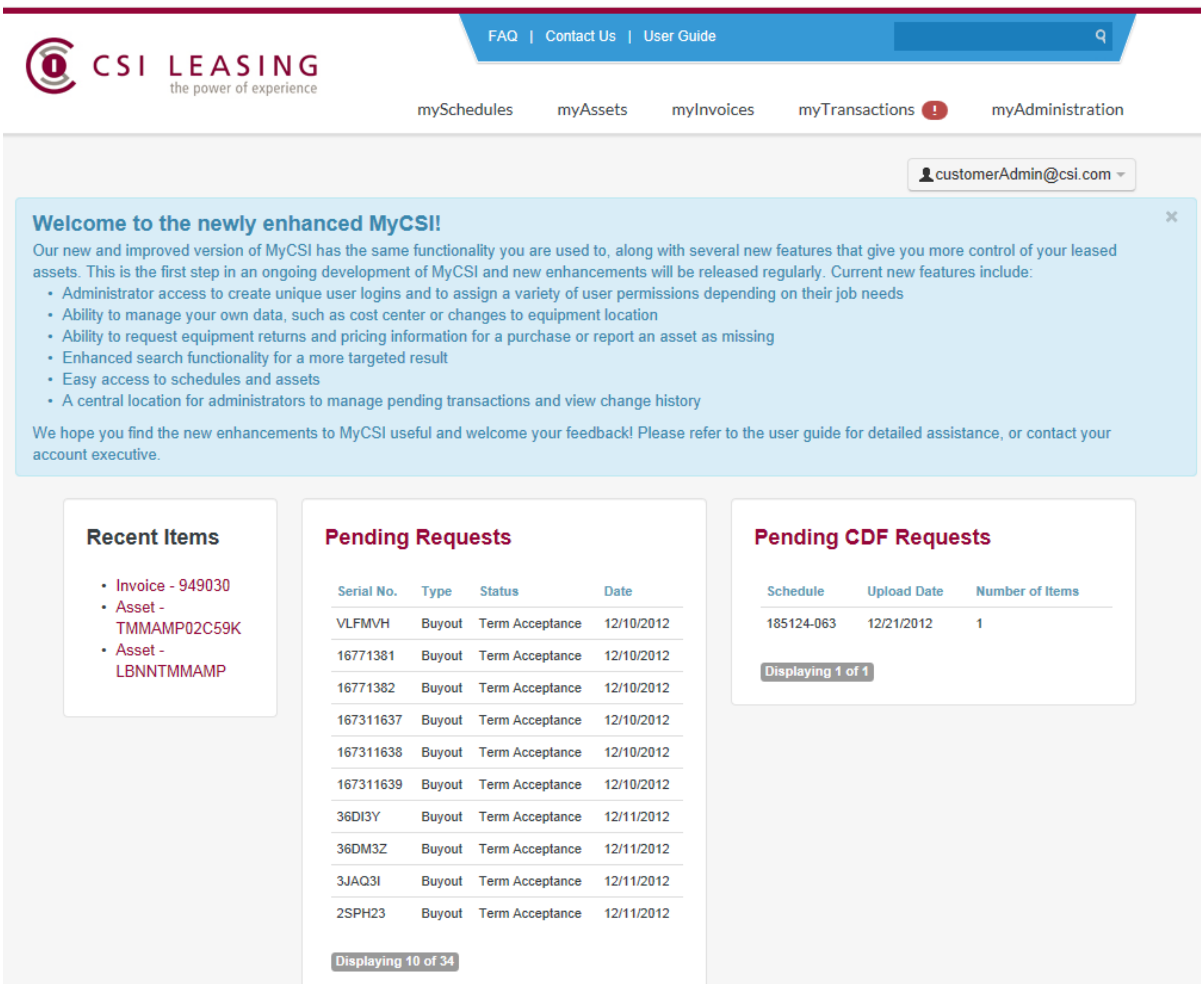
1.6 Log out of MyCSI

Log out of MyCSI when work is complete. From the dropdown menu that is your login name, select the *Sign Out* option.

1.7 Home Page Overview

The home page is the first page displayed after logging into MyCSI. Depending on assigned permissions users can preview recently viewed items, pending requests and pending CDF requests or select tab options to access information.

A global search for information is available from the home page in the upper right hand corner.



Item Description

1. **Record Tabs** – Access different types of information by selecting the appropriate tab at the top of the page.
2. **Global Search** – Search for information in all the data available to the logged in user.
3. **Recent Items** – A list of up to 10 recently viewed items are displayed. To see the details of an item, select the hyperlink of the corresponding item.
4. **Pending Requests** – Visible by users with transaction permissions. A list of up to 10 records displaying requests for buyout, return or CSI data changes. To see the details of the transactions, select the ***Pending Requests*** at the top of the **Pending Requests** section.
5. **Pending CDF Requests** – Visible by users with data upload permissions. A list of up to 10 records displaying customer defined data changes that were submitted and are awaiting approval. Also indicates the total number of pending changes. To see the details of the change requests, select the ***Pending CDF Requests*** link at the top of the **Pending CDF Requests** section.

1.8 Tab Overview / Page Layout

The page layouts for each section are similar.

Note: Tab visibility is determined by permissions granted to the individual users.

1.9 Personal Setup

MyCSI allows users to edit some personal information, change their password and view other settings. Users can access this information by selecting the appropriate option from the dropdown menu located that is your displayed user name.

1.10 Getting Help

- Select the ***FAQ*** link at the top of each page

- Contact your local MyCSI administrator or CSI account executive

- View the User Guide

2. Search

MyCSI offers three ways to search for information – **Global Search, Basic Search** and **Advanced Search**. The difference between the Global and Basic/Advanced searches is the sections and number of fields that are searched.

All search methods return a list of results with items that **contain** matches for your search terms.

2.1 **Global Search** searches across three sections – Assets, Invoices, and Schedules on the following fields: Master Lease No., Schedule, Serial No., Customer Reference, Manufacturer, and Model.

Note: Invoice information is available only for US/Canada users at this time.

Search will display results from each section grouped accordingly and determined by access to information granted to the user.

The following example displays the result of a global search with criteria of 1. MyCSI found 5 Schedules, 1 Invoice, and 852 Assets that meet the search criteria.

Search Results

Schedules (5)

Lease No./Schedule	Term Start	Term	Term Expiration	Total Rent
DEMO - 016	4/1/2011	36	3/31/2014	$5,625.00
DEMO - 022	5/1/2011	48	4/30/2015	$18,116.46
DEMO - 030	7/1/2011	30	12/31/2013	$9,672.76
DEMO - 062	7/1/2011	36	6/30/2014	$14,939.13
DEMO - 195	3/1/2011	30	8/31/2013	$4,538.16

Show More...

Invoices (1)

Invoice No.	Rental Period	Due Date	Total Due	PDF
1	5/1/2012 - 5/31/2012	5/1/2012	$1,927.50	

Show More...

Assets (852)

Serial No.	Manufacturer	Model	Customer Reference	Location	State	Rent
16771381	DELL	15" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$0.00
16771382	DELL	15" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$0.00
16611671	DELL	17" MONITOR	DIVISION 31	900 6TH STREET	MS	$0.00
166913213	DELL	17" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$0.00
166913214	DELL	17" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$4.53
167311610	DELL	17" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$0.00
167311611	DELL	17" MONITOR	DIVISION 31	900 6TH STREET	MS	$0.00
167311612	DELL	17" MONITOR	DIVISION 55	500 WEST 3700N ROAD	IL	$0.00
167311613	DELL	17" MONITOR	DIVISION 90	9020 CITY CENTER DRIVE	AL	$0.00

2.2 Basic and Advanced Search

2.2.1 Search for Schedules

Using the **Basic** Search function on the **mySchedule** page returns results for Schedules matching the criteria.

For more targeted search results, use **Advanced** Search on the following fields or combination of fields of Schedule information: Customer, Portfolio, Lease No., Schedule, Term, Expiration Date (To and From) or Rent Amount.

2.2.2 Search for Assets

Using the Basic Search function on the **myAssets** page returns results for assets matching the criteria from the Lease No./Schedule, Serial No., Manufacturer, Model, Customer Reference or Location fields.

For more targeted search results, use Advanced Search on the following fields or combination of fields of asset information: Serial No., Manufacturer, Model, Customer Reference, Term Expiration, Customer Defined Fields (CDF), Address, City, State, Postal Code, Country, or Rent.

2.2.3 Search for Invoices (US/Canada users only)

For more targeted search results, from the **myInvoices** page use Advanced Search on the following fields of Invoice information: Payment Due Date, Lease No., Schedule, Serial Number, Manufacturer, Customer Reference, Date Started, Date Ended, Billing Address, Billing City, Billing State, Billing Postal Code, or Billing Country.

3. mySchedules

The **mySchedules** section provides users the ability to view basic information about their active Schedules such as start and end dates and total rent. Users have the ability to export the information.

From here, users can also view Schedule details including all the assets they have on lease for that Schedule.

Users with appropriate permissions can submit requests for equipment purchases or returns, or changes to either customer defined data or CSI data (customer reference or equipment location); or communicate with other users about specific assets.

Permissions needed: View Portfolio Information

TIP: Sort the information by selecting a column heading. Information will sort in ascending order, or select the column heading again to sort in descending order.

3.1 Export Schedule summary data

<u>**Step Action**</u>

1. From the **mySchedule** page, select the *Excel* or *CSV* button on the right to export **all** Schedule summary data (all the results of that search).

Or,

1. Check the box next to a specific Schedule or Schedules to include in the export and select the *Export Selected to CSV* or *Export Selected to Excel* option from the dropdown menu on the left.
2. Select the *Submit* button to export **selected** Schedule summary data.

3.2 Export Schedule summary data with assets

__Step Action__

1. From the **mySchedule** page, select the *Excel w/assets* or *CSV w/assets options* from the buttons on the right to export **all** Schedule summary data with assets (all the results of that search)

Or,

1. Check the box next to a specific Schedule or Schedules to include in the export and select the *Export Selected to CSV w/assets* or *Export Selected to Excel w/assets* option from the dropdown menu on the left
2. Select the *Submit* button to export selected Schedule summary data with assets

3.3 Documents

When available, users can access documents for a Schedule by selecting the *Assets and Documents* button.

The system displays the Schedule detail page with the Documents section visible.

Select the *Download* button next to the document to view.

3.4 View Schedule Details

From the **mySchedules** page, select the relevant ***Lease No./Schedule*** link to view the Schedule's details.

3.4.1 Export Schedule Detail/Asset data

__Step Action__

1. Select the *Excel* or *CSV* button on the right to export **all** asset data for the selected Schedule.

Or,

1. Check the box next to the asset(s) to include in the export and select the *Export Selected to CSV* or *Export Selected to Excel* option from the dropdown menu on the left.
2. Select the *Submit* button to export **selected** Schedule detail data.

3.4.2 Edit CDFs via in-line editing

Users with appropriate permissions can edit CDF data in-line for the assets.

Permissions needed: CDF Entry

Note: In-line editing of CDFs is limited to the maximum of the **100** assets that can be displayed in the results. Use the **Assets Filter** to limit the number of assets displayed to 100 or less, or consider exporting the assets and updating the CDFs via upload.

Refer to **Section 12** for CDF change via in-line editing Step Actions.

3.4.3 Edit CDFs via upload

Users with appropriate permissions can perform an edit of CDF via data upload.

This feature allows users to update more than 100 assets at once.

Permissions needed: CDF Data Upload

Refer to **Section 12** for CDF change via upload Step Actions.

3.4.4 End-of-Lease Equipment Return Request

Users with appropriate permissions can submit a request to return equipment that is currently on lease.

Permissions needed: Request Return

Refer to **Section 8** for asset return Step Actions.

3.4.5 End-of-Lease Equipment Buy Request

Users with appropriate permissions can submit a request to purchase equipment that is currently on lease and receive pricing information from CSI.

Permissions needed: Request Buyout

Refer to **Section 9** for end-of-lease equipment buyout Step Actions.

3.4.6 End-of-Lease Equipment Extension/Renewal Request

Users with appropriate permissions can submit a request to extend/renew equipment that is currently on lease.

Permissions needed: Request Extension

Refer to **Section 10** for end-of-lease equipment extension/renewal Step Actions.

3.4.7 Internal Communication

Users with appropriate permissions can communicate information about specific assets to their management such as to report a missing asset or serial number substitution.

Permissions needed: Communicate

Refer to **Section 11** for internal communication Step Actions.

3.4.8 Documents

If available, users will have access to any relevant documents for a schedule, such as an electronic version of the Master Lease Agreement, Lease Schedule contract or Certificate of Acceptance.

4. myAssets

The myAssets section provides users the ability to view basic information about all the asset details on lease. Users have the ability to export the information.

Users with appropriate permissions can submit requests for equipment purchases, returns or extensions, or changes to either customer defined data or CSI data (customer reference or equipment location); or communicate with other customer users about specific assets.

Permissions needed: View Portfolio Information

TIP: Sort the information by selecting a column heading. The information will sort the information in ascending order. Select the column heading again to sort in descending order.

TIP: Use the Advanced Search function to receive more targeted results.

4.1 Export Asset detail data

Step Action

1. From the **myAssets** page, select the *Excel* or *CSV* button on the right to export **all** asset detail data.

Or,

1. Check the box next to the asset(s) to include in the export and select the *Export selected to CSV* or *Export selected to Excel* option from the dropdown menu on the left.

2. Select the *Submit* button to export **selected** asset detail data.

4.2 Search

For more targeted search results users can perform an Advanced Search on the following fields of ssset information: Portfolio, Customer, Serial No., Manufacturer, Model, Customer Reference, Term Expiration (range), Customer Defined Fields, Address, City, State, Postal Code, Country, or Rent.

Note: Refer to **Section 2** for more information on search functionality.

4.3 End-of-Lease Equipment Return Request

Users with appropriate permissions can submit a request to return equipment that is currently on lease.

Permissions needed: Request Return

Refer to **Section 8** for asset return Step Actions.

4.4 End-of-Lease Equipment Buy Request

Users with appropriate permissions can submit a request to purchase equipment that is currently on lease and receive pricing information from CSI.

Permissions needed: Request Buyout

Refer to **Section 9** for asset buyout Step Actions.

4.5 End-of-Lease Extension/Renewal Request

Users with appropriate permissions can submit a request to extend or renew equipment that is currently on lease.

Permissions needed: Request Extension

Refer to **Section 10** for asset extension/renewal Step Actions.

4.6 Internal Communication

Users with appropriate permissions can communicate information about specific assets to their management such as to report a missing asset.

Permissions needed: Communicate

Refer to **Section 11** for internal communication Step Actions.

4.7 View Asset Details

Select an asset ***Serial No.*** link to view the details of the asset.

4.7.1 Edit Asset CDFs

Users with appropriate permissions can perform an edit of the asset's CDF data or enter data in the Customer Data Fields.

Permissions needed: CDF Entry

Note: Editing CDFs at this level are for the selected asset. See **Section 122** for editing CDF data for multiple assets.

Step Action

1. Select the *Edit CDFs* button.

2. Enter the data in the applicable fields.

3. Select the *Submit* button.

4. The system displays a message indicating that the changes submitted were successful, sends an email requesting approval of the changes to the local user with CDF Approval permissions, and displays a warning symbol indicating a change has been requested but not yet approved.

Note: Changes are not displayed until the change has been approved by a manager with approval permissions.

Note: Requests for changes to CDFs need to be approved by a user with CDF Approval permissions. For users with CDF Approval permissions requesting the CDF changes, the changes are automatically approved and applied.

View pending CDF changes from the **Pending CDF Requests** section of **myTransactions**. An (*exclamation point*) is displayed on the **myTransactions** tab if a user has pending actions.

4.7.2 Edit CSI Asset Data

Users with appropriate permissions can edit CSI data – Customer Reference and equipment location fields.

Permissions needed: Edit CSI Asset Data

Note: Editing CSI data at this level is for the selected asset only.

Refer to **Section 13** for CSI Data management Step Actions.

4.7.3 End-of-Lease Equipment Return Request

Users with appropriate permissions can submit a request to return equipment that is currently on lease. This action is to request the return of the asset currently being viewed. Refer to **Section 8** to request to return multiple assets.

Permissions needed: Request Return

Refer to **Section 8** for end-of-lease equipment return Step Actions.

4.7.4 End-of-Lease Equipment Buy Request

Users with appropriate permissions can submit a request to purchase equipment that is currently on lease and to receive pricing information from CSI.

Permissions needed: Request Buyout

Refer **to Section 9** for end-of-lease equipment Buy Step Actions.

4.7.5 End-of-Lease Equipment Extension/Renewal Request

Users with appropriate permissions can submit a request to extend/renew equipment that is currently on lease. This action is to request the extension of the asset currently being viewed. Refer to **Section 10** to request to return multiple assets.

Permissions needed: Request Extension

Refer to **Section 10** for end-of-lease equipment extension/renewal Step Actions.

4.7.6 Internal Communication

User with appropriate permissions can communicate information about a single asset to their management.

Permissions needed: Communicate

Refer to **Section 11** for Internal Communication Step Actions.

5. myInvoices (US/Canada only)

The **myInvoices** section gives users the ability to view basic information about their Invoices such as Rental Period, Due Date, and Total Rent. Users can view a PDF copy of the invoice when available. Both rental and non-rental invoices will be available.

From here, users can also view the Invoice details which include all the assets included on that Invoice as well as search or export invoice information.

Note: Invoices are available in MyCSI for **120 days**.

Permissions needed: View Invoices

TIP: Sort the information by selecting a column heading. The information will sort in ascending order. Select the column heading again to sort in descending order.

TIP: Use the Advanced Search function to receive more targeted results.

5.1 Export Invoice summary data

Step Action

1. From the **myInvoices** page, select the *Excel* or *CSV* button on the right to export **all** Invoice summary data.

5.2 Search

For a more targeted search result, users can perform an Advanced Search on the following fields of Invoice information: Portfolio, Payment Due Date, Lease No., Schedule, Serial No., Manufacturer, Customer Reference, Date Started, Dated Ended, Billing Address, Billing City, Billing State, Billing Postal Code, or Billing Country.

Note: See **Section 2** for more information on Search functionality.

5.3 Documents

When available, users can access an electronic version of the invoice by selecting the document link in the PDF column on the myInvoices page.

5.4 View Invoice Details

Select the applicable ***Invoice No.*** link to view the details of the Invoice.

5.4.1 Export Invoice Detail/Asset data

Step Action

1. Select the *Excel* or *CSV* button on the right to export **all** asset data for the Invoice,

Or,

1. Check the box next to the asset(s) to include in the export and select the *Export selected to CSV* or *Export selected to Excel* option from the dropdown menu on the left.

2. Select the *Submit* button to export **selected** Invoice detail data.

5.4.2 Documents

An electronic version of the Invoice can be downloaded by selecting the *Download Invoice* button.

Note: The **Download Invoice** button is inactive if there is no invoice available for this Invoice record.

6. myTransactions

Users with appropriate permissions will be able to view transactions with MyCSI in the **myTransactions** section. Users with approval permissions can review any open requests and either approve or decline the request.

6.1 Pending Requests

Pending Requests provides users the ability to view any return, buyout or CSI data change requests that are waiting decision. Users with approval permissions can review and either approve or decline these requests.

Note: CDF data changes submitted can be reviewed and approved from the **Pending CDF Requests** section.

Note: See **Section 16.2** for Transaction Status definitions.

To view:

Step Action

1. From **myTransactions**, select the **Pending Requests** tab. The system displays all the open items.

TIP: Sort items by selecting the Asset, Comment, Submit Date, Submit Approval Date, Terms Set By Date, or Terms Accepted Date column heading. The system sorts the information in ascending order. Select the column heading again for the information to be sorted in descending order.

TIP: Select the *Filter* button to search by Serial No., Transaction Type, or Customer Reference for a more targeted result.

TIP: Check the box in line with the column headings to select **all** items for approval or rejection.

TIP: Hovering the cursor over the […] button displays the contents of the message.

To Approve/Decline:

Permissions needed: Approve Buyout, Approve Returns, Approve Extension, or Approve CSI Data Change

Step Action

1. From **myTransactions**, select the **Pending Requests** tab. The system displays all the open items.
2. Check the box next to the item to approve/decline.
3. Enter any relevant information in the Comment field.
4. Repeat steps 2 and 3 for each item to approve/decline.
5. Select the *Approve Selected/Decline Selected* button.
6. The system displays a message that the items were approved/declined.

Note: For buyout requests, once the request has received internal approval, an email is sent to CSI for review and pricing. The assets requested remain in the **Pending Requests** section until the pricing terms set by CSI have been accepted internally (by the customer). An attachment with details of the request is included in the email.

Note: For return requests, once the request has received internal (customer) approval, an email is sent to CSI for completion of the request. An attachment with details of the request is included in the email.

Note: For extension/renewal requests, once the request has received internal (customer) approval, an email is sent to CSI for completion of the request. An attachment with details of the request is included in the email.

Note: For CSI data change requests, once the request has received internal approval, an email is sent to CSI for request completion. An attachment with details of the request is included in the email.

6.2 Request History

Request History provides users the ability to view the status of any Return, Buyout, Extension/Renewal or CSI data change requests that have been approved for CSI. Status indicates what stage of the process the request is in.

All internal communications are also available to view from the **Request History** section.

Note: Refer to **Section 16.2** for Transaction Status

definitions. **To view:**

Step Action

1. From **myTransactions**, select the **Request History** tab. The system displays all the customer approved or declined items.

TIP: Sort items by selecting the Comment, Submitted User, Submit Date, Submit Approval Date, Terms Set By Date, or Terms Accepted Date column heading. The system sorts the information in ascending order. Select the column heading again for the information to be sorted in descending order.

TIP: Select the *Filter* button to search Serial No., Transaction Type, or Customer Reference for a more targeted result.

6.3 CDF Summary

CDF Summary provides a quick look at the status of any CDF data change requests.

(thumbs up) symbol indicates data change is approved and applied.

(question mark) symbol indicates data change is pending approval.

(thumbs down) symbol indicates that a data change request was declined.

6.4 Pending CDF Requests

Pending CDF Requests is used to review and take action on any CDF data change requests.

Users with Approval permissions can approve or decline requested CDF data changes.

6.4.1 To Approve/Decline:

Permissions needed: CDF Approval

Step Action

1. From **myTransactions**, select the **Pending CDF Requests** tab. The system displays the pending items.
2. Check any box next to the Schedule with items to approve/decline.

3. Select the *Approve Selected/Decline Selected* button.
4. The system displays a message that the items were approved/declined.

TIP: Select the ***Details*** link to review all the requested changes.

6.5 CDF Request History

CDF Request History provides a historical view of all the changes approved for CDFs. Historical information remains in MyCSI for an indefinite amount of time.

The "**Changes**" column displays the field name with the previous value followed by the new value.

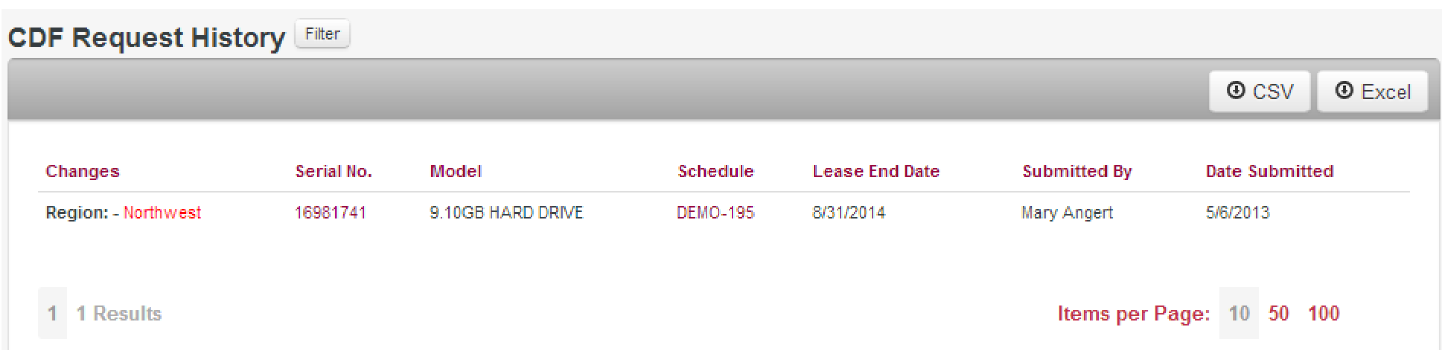
Example:

Invoice No.: No Value - INV 20120705

HINT: the value of the change that is being requested is highlighted in red

TIP: Sort items by selecting the Change, Serial No., Model, Schedule, Lease End Date, Submitted By, or Date Submitted column heading. The system sorts the information in ascending order. Select the column heading again for the information to be sorted in descending order.

TIP: Select the *Filter* button to search by Serial No. or Customer Reference for a more targeted result.



7. myAdministration

Users with administrative permissions can perform a variety of tasks such as adding or modifying user accounts, managing email templates and managing CDF labels.

7.1 Create a new user account

Permission needed: Create Customer Users

Step Action

1. From the **myAdministration** page, select the *Add Profile* button.
2. Enter information in the following fields:

Field	Description	Comments
Email	User's email address	***Required field** Email address will be used as the username for logging into MyCSI
First Name	User's first name	***Required field**

Field	Description	Comments
Last Name	User's last name	***Required field**
Password	Password the user will use to log into MyCSI	***Required field** Users can change their passwords at any time
Validate Password	Re-enter the password entered above to validate	***Required field**
Portfolio	Primary CSI company this user does business with	Users with this permission are limited to information associated with the portfolio assigned to them **Note:** Portfolio defaults to the portfolio of the assigning administrator
Default Permissions	Used to quickly assign typical permissions for users	Once the account is created, permissions can be added or subtracted to provide the user with the correct level of access
Asset Data Only	Used to restrict user's access to only asset information	Users with this restriction will have access to very limited Schedule information

3. Select the *Save* button
4. Assign permissions to the user
    a. Check or uncheck the box next to the applicable permission

    Note: Refer to **Section 16.1** for permission details

    b. Filter Portfolios for access (as required)
    c. Filter Leases for access (as required)
    d. Filter Schedules (as required)
    e. Filter Key CDF (as required)
5. Select the *Save* button
6. The administrator sends an email to the user with login instructions and username and password.

7.2 Manage an existing user account

Permission needed: Create Customer Users

<u>Step Action</u>

1. From the **myAdministration** page, select the *Profile Search* button
2. Select the user name to modify
3. Update the fields as required
4. Select the *Save* button

Note: Check the ***Locked*** box to make a user account inactive. Performing this action prevents the user from logging into MyCSI and retains any historical information associated with the user account.

7.3 Reset Password

Permission needed: Change Passwords

<u>Step Action</u>

1. From the **myAdministration** page, select the *Profile Search* button
2. Select the ***Reset Password*** link next to the user name
3. The system automatically sends an email to the user with password reset instructions

7.4 Manage Customer Defined Field (CDF) Labels

There are eleven (11) Customer Defined Fields (CDF) available for custom data. The first field, labeled "**Key CDF Label**" has a dual role. The label entered here can be used to label the first column of data and can be used as a filter to further restrict users' access to information.

Permission needed: Label CDFs

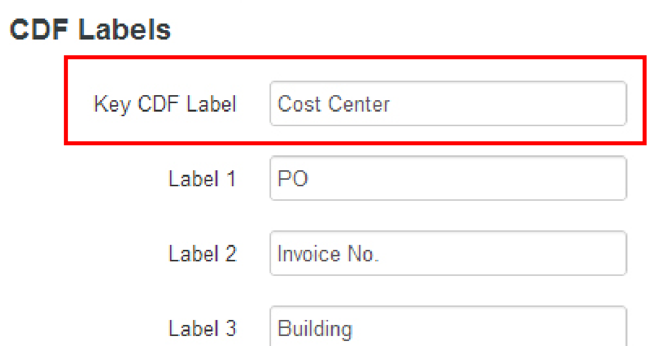
<u>Step Action</u>

1. From the **myAdministration** page, select the *CDF Labels* button
2. Select the Lease Number for the labels to manage
3. Enter the label information
4. Select the *Save* button
5. The system displays a message that the update was successful

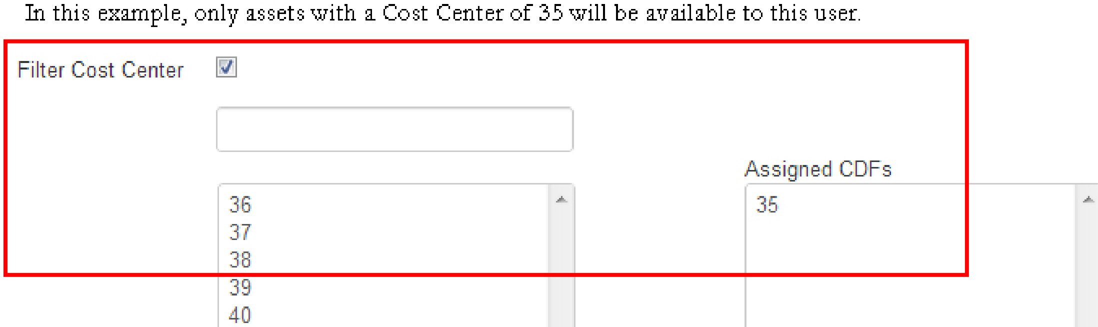
Hint: CDFs are displayed on the Schedule detail page or on the individual asset detail page

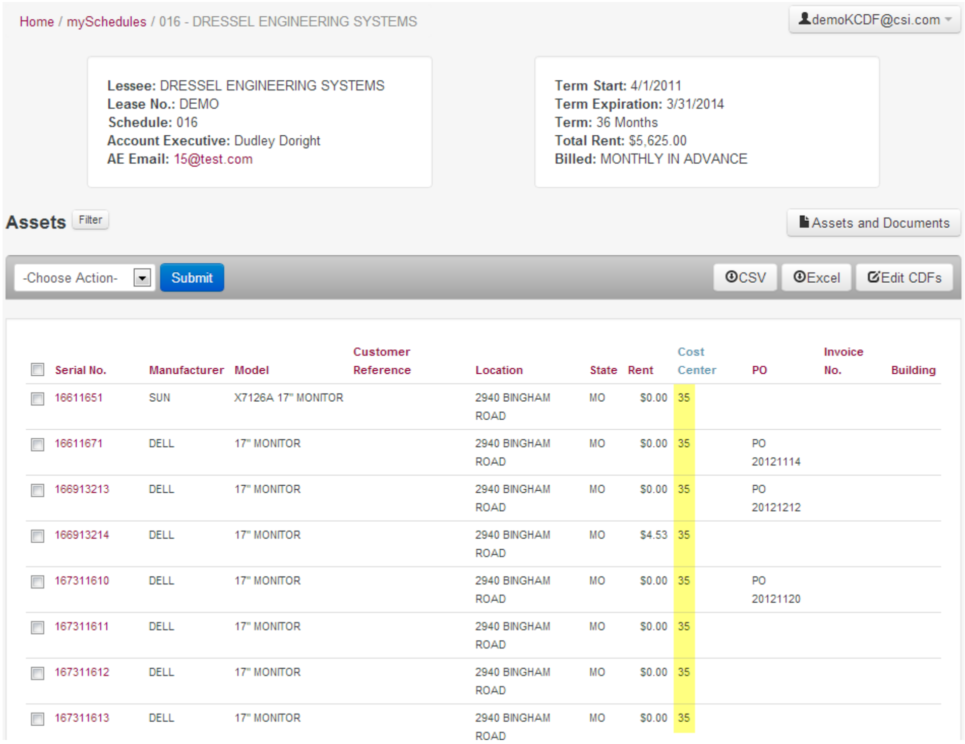
Key CDF Example

Enter a label in the **Key CDF Label** field



The Key CDF is now available on the profile page as a filter.
Use this field to further limit a user's access to assets.
In this example, only assets with a Cost Center of 35 will be available to this user.





Serial No.	Manufacturer	Model	Customer Reference	Location	State	Rent	Cost Center	PO	Invoice No.	Building
16611651	SUN	X7126A 17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35			
16611671	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35	PO 20121114		
166913213	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35	PO 20121212		
166913214	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$4.53	35			
167311610	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35	PO 20121120		
167311611	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35			
167311612	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35			
167311613	DELL	17" MONITOR		2940 BINGHAM ROAD	MO	$0.00	35			

7.5 Manage Email Templates

Email templates are used in communications with CSI personnel or for internal communication for data changes, end-of-lease return or buyout requests.

Users with appropriate permissions can manage the email templates.

Permission needed: Maintain Email Templates

Step Action

1. From the **myAdministration** page, select the *List Email Templates* button
2. Select the Master Lease
3. Select a template to edit
4. Enter the name and email address of the users to receive the notification
5. Customize the Email Subject
6. Customize the message content in the Email Body field

Note: Do **NOT** delete the [[body]] text. This contains system generated information that will be included in the email.

7. Select the *Save* button

Use tags to include dynamically generated information in the email such as the customer's name, name of the person the email is coming from as well as their email address.

7.5.1 Email Template Descriptions

Email Template	Description
Buyout Request [Customer]	This template is used for the email sent to the approver for equipment buyout requests
Buyout Ready for Terms [CSI]	This template is used for the email sent to CSI after approval of the buyout request
Returns Approval [CSI]	This template is used for the email sent to CSI after approval of the returns request
Return Request [Customer]	This template is used for the email sent to the approver for equipment return requests
Extension Request [Customer]	This template is used for the email sent to the approver for equipment extension/renewal requests
Extension Request [CSI]	This template is used for the email sent to CSI after approval of the extension/renewal request
Request Denied [Customer]	This template is used for the email sent to the requester for an equipment return request that was declined
Buyout Terms Set [Customer]	This template is used for the email sent to the user after CSI provides the information about the pricing and effective date
Buyout Terms Approved [CSI]	This template is used for the email sent to CSI after the user has approved the purchase terms of the equipment
Internal Communication [Customer]	This template is used for the email sent to the selected recipients of an internal communication
CSI Data Change Request [Customer]	This template is used for the email sent to the approver for CSI data change requests
CSI Data Change Approved [CSI]	This template is used for the email sent to CSI with the details of the requested CSI Data changes
Customer Data Change Request [Customer]	This template is used for the email sent to the approver for CDF data change requests
Scheduled Report [Customer]	This template is used for the email sent to users to deliver the scheduled report
Scheduled Report [Customer]	This template is used for the email sent to users when the report scheduled for delivery is too large to include in the email Provides instructions for downloading the report from MyCSI

8. End-of-Lease Asset Return Management

8.1 Request to return assets

Users with appropriate permissions can request to return equipment currently on lease.

Permissions needed: Request Return

Requests to return equipment can be initiated from the **mySchedule** or **myAssets** detail page.

8.1.1 Request to return multiple assets

TIP: Initiate the request from the **mySchedules** detail page if assets are from the same Schedule. Initiate the request from the **myAssets** page if the assets are from multiple Schedules.

From the **mySchedules** detail or **myAssets** page:

<u>**Step Action**</u>

1. From the **mySchedules** page, select the schedule that contains the assets you want to return and check the box next to the asset(s) to include in the request for return

   Or,

   From the **myAssets** page, check the box next to the asset(s) to include in the request for return
2. Select the *Request Return* option from the dropdown menu on the left side
3. Select the *Submit* button
4. Enter any comments in the **Comment** field

TIP: Select the *x* button to remove the asset in the request for return

Note: A warning symbol indicates that the item selected has more than 30 days left on the lease. Hovering the cursor over the symbol displays the message.

5. Select the *Submit* button
6. The system sends an email requesting approval of the return to the local user with Returns Approval permissions and displays a warning symbol indicating a return has been requested but not yet approved.

Note: Requests for returns must be approved by a user with Returns Approval permissions.

Once approval is given, the system moves the items to the **Request History** section and sends an email to CSI. The email includes all the details of the assets to return.

The status of the items will display as ***Pending*** until the item has been processed by CSI. The system will update the status when the return task is completed.

For users with Returns Approval permission requesting the return, the items are automatically approved and an email is sent to CSI.

View pending asset return requests from the **Pending Requests** section of **myTransactions**. An (*exclamation point*) is displayed on the myTransactions tab if there are pending actions.

View approved asset return requests from the **Request History** section of **myTransactions**.

8.1.2 Request to return a single asset

From the **myAssets** detail page, follow steps above.

8.2 Approve or Decline Requests

Users with appropriate permissions can approve or decline requests to return equipment currently on lease.

Permissions needed: Approve Return

Refer to **myTransactions Section 6** for Approve and Decline processes.

9. End-of-Lease Asset Buyout Management

9.1 Request to buy assets

Users with appropriate permissions can submit a request to purchase equipment that is currently on lease and to receive pricing information from CSI.

Requests to buy equipment can be initiated from the **mySchedule** or **myAssets** detail page.

Permissions needed: Request Buyout

9.1.1 Request to buy multiple assets

TIP: Initiate the request from the **mySchedules** detail page if assets are from the same Schedule. Initiate the request from the **myAssets** page if the assets are from multiple Schedules.

From the **mySchedules** detail or **myAssets** page:

Step Action

1. From the **mySchedules** page, select the schedule that contains the assets you want to buyout and check the box next to the asset(s) to include in the request for buyout

   Or,

   From the **myAssets** page, check the box next to the asset(s) to include in the request for buyout
2. Select the *Request Buyout* option from the dropdown menu on the left side and select the *Submit* button.
3. Enter any comments in the **Comment** field.

TIP: Select the *x* button to remove any asset from the request for buy.

Note: A warning symbol ⚠ is displayed indicating that the item selected has more than 30 days left on the lease. Hovering the cursor over the symbol displays the message.

4. Select the *Submit* button.
5. The system displays a message that the items were submitted successfully, sends an email requesting approval of the buyout to a user with Buyout Approval permissions, and displays a warning symbol ⚠ indicating a buyout has been requested but not yet approved for submittal to CSI.

Note: Requests for equipment purchases must be approved by a user with Buyout Approval permissions.

Once approval is given, the system sends an email to CSI. The email includes all the details of the assets to purchase.

For users with Buyout Approval permissions requesting the buy, the items are automatically approved and the email sent to CSI for pricing.

View pending asset purchase requests from the **Pending Requests** section of **myTransactions**. An ! (*exclamation point*) is displayed on the **myTransactions** tab if there are pending actions.

View approved asset purchase requests from the **Request History** section of **myTransactions**.

9.1.2 Request to buy a single asset

From the **myAssets** detail page, follow steps above.

9.2 Approve or Decline Requests

Users with appropriate permissions can approve or decline requests for purchases of equipment currently on lease.

Permissions needed: Approve Buyout

Refer to **myTransactions** **Section 6** for Approve and Decline processes.

10. End-of-Lease Extension / Renewal Management

10.1 Request to extend/renew assets

Users with appropriate permissions can request to extend or renew equipment currently on lease.

Permissions needed: Request Extension

Requests to extend/renew equipment can be initiated from the **mySchedule** or **myAssets** detail page.

10.1.1 Request to extend/renew multiple assets

TIP: Initiate the request from the **mySchedules** detail page if assets are from the same Schedule. Initiate the request from the **myAssets** page if the assets are from multiple Schedules.

From the **mySchedules** detail or **myAssets** page:

Step Action

1. From the **mySchedules** page, select the schedule that contains the assets to extend/renew and check the box next to the asset(s) to include in the request for extension/renewal

   Or,

   From the **myAssets** page, check the box next to the asset(s) to include in the request for extension/renewal
2. Select the *Request Extension* option from the dropdown menu on the left side
3. Select the *Submit* button
4. Enter any comments in the **Comment** field

TIP: Select the *x* button to remove the asset in the request for extension/renewal

Note: A warning symbol indicates that the item selected has more than 30 days left on the lease. Hovering the cursor over the symbol displays the message.

5. Select the *Submit* button
6. The system sends an email requesting approval of the extension/renewal to the local user with **Extension Approval** permissions and displays a warning symbol indicating an extension/renewal has been requested but not yet approved.

Note: Requests for extensions/renewals must be approved by a user with **Approve Extension** permissions.

Once approval is given, the system moves the items to the **Request History** section and sends an email to CSI. The email includes all the details of the assets to extend/renew.

The status of the items will display as ***Pending*** until the item has been processed by CSI. The system will update the status when the extension/renewal task is completed.

For users with **Approve Extension** permission requesting the extension/renewal, the items are automatically approved and an email is sent to CSI.

View pending asset extension/renewal requests from the **Pending Requests** section of **myTransactions**. An ! (*exclamation point*) is displayed on the myTransactions tab if there are pending actions.

View approved asset extension/renewal requests from the **Request History** section of **myTransactions**.

10.1.2 Request to return a single asset

From the **myAssets** detail page, follow steps above.

10.2 Approve or Decline Requests

Users with appropriate permissions can approve or decline requests for extensions/renewals of equipment currently on lease.

Permissions needed: Approve Extension

Refer to **myTransactions Section 6** for Approve and Decline processes.

11. Internal Communications

User with appropriate permissions can communicate information about specific assets to their management such as to report a missing asset.

Internal communications can be initiated from the **mySchedule** or **myAssets** detail page.

Permissions needed: Communicate

11.1 Request to communicate about multiple assets

From the **mySchedules** detail or **myAssets** page:

Step Action

1. From the **mySchedules** page, select the schedule that contains the assets you want to communicate about and check the box next to the asset(s) to include in the communication

   Or,

   From the **myAssets** page, check the box next to the asset(s) to include in the communication
2. Select the *Communicate Internally* option from the dropdown menu on the left side
3. Check the box next to the email address of users to include in the communication
4. Include any additional recipients in the CC field, separated by a semi-colon
5. Enter any comments in the **Comment** field

TIP: Select the *x* button to remove any asset from the internal communication

6. Select the *Submit* button
7. The system displays a message indicating communication was submitted successfully and sends an email to the selected recipients

View internal communications from the **Request History** section of **myTransactions**.

Use the Communicate Internally feature to communicate information about assets to not only internal users, but CSI personnel as well

11.2 Request to communicate about a single asset

From the **myAssets** detail page, follow steps above.

12. Customer Defined Field (CDF) Management

12.1 Edit CDFs in-line

Users with appropriate permissions can edit CDF data for the assets in-line.

Requests to change CDF data via in-line editing can **only** be initiated from the MySchedule detail page.

Permissions needed: CDF Entry

Note: In-line editing of CDFs is limited to the **100** assets displayed in the results. Use the **Assets Filter** to limit the number of assets displayed to 100 or less, or consider exporting the assets and updating the CDFs via upload.

Step Action

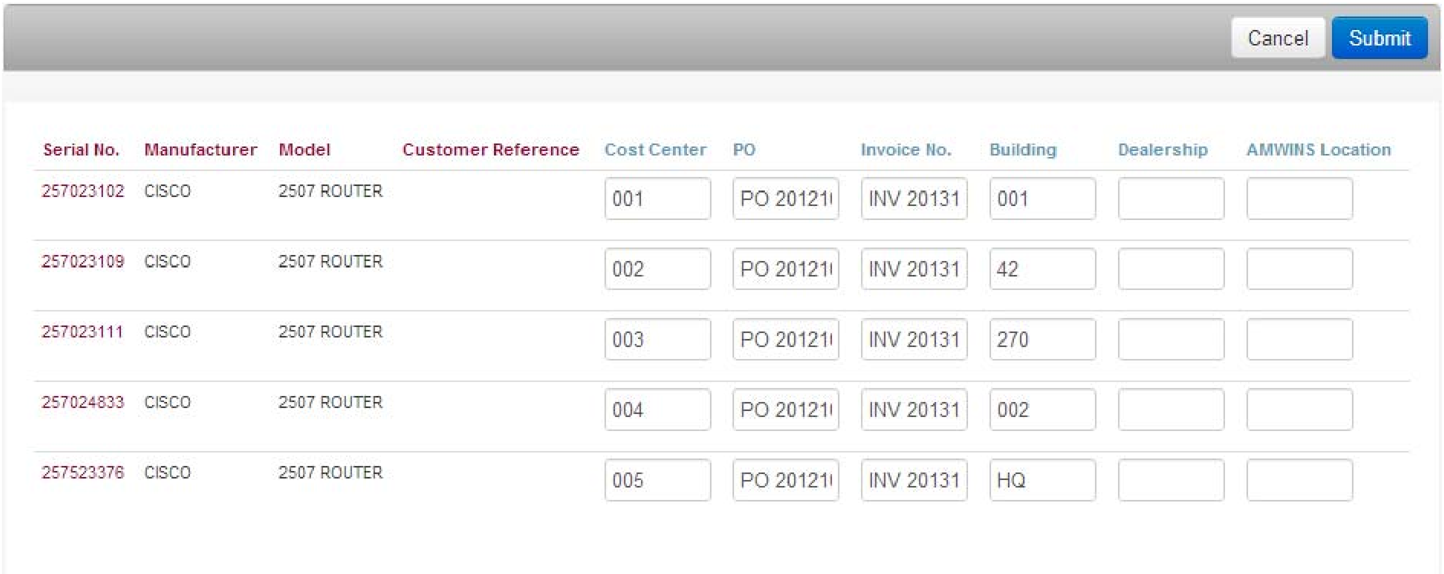
1. From the **mySchedules** detail page, select the *Edit CDFs* button.
2. Enter the data in the appropriate field.
3. Select the *Submit* button.
4. The system displays a message indicating that the changes submitted were successful, sends an email requesting approval of the changes to the local user with CDF Approval permissions, and displays a warning symbol indicating a change has been requested but not yet approved.

Note: Changes are not displayed until the change has been approved by a manager with approval permissions.

Note: For users with CDF Approval permissions requesting the CDF changes, the changes are automatically approved and applied.

View pending CDF change requests from the **Pending CDF Requests** section of **myTransactions**. An (*exclamation point*) is displayed on the **myTransactions** tab if a user has pending actions.

View applied changes to CDFs from the **CDF Request History** section of **myTransactions**.



Serial No.	Manufacturer	Model	Customer Reference	Cost Center	PO	Invoice No.	Building	Dealership	AMWINS Location
257023102	CISCO	2507 ROUTER		001	PO 20121	INV 20131	001		
257023109	CISCO	2507 ROUTER		002	PO 20121	INV 20131	42		
257023111	CISCO	2507 ROUTER		003	PO 20121	INV 20131	270		
257024833	CISCO	2507 ROUTER		004	PO 20121	INV 20131	002		
257523376	CISCO	2507 ROUTER		005	PO 20121	INV 20131	HQ		

12.2 Edit CDFs via upload

Users with appropriate permissions can perform an edit of CDF via data upload.

This feature allows users to update more than 100 assets at a time.

Requests to change CDF data via upload can **only** be initiated from the **MySchedule** detail page.

Permissions needed: CDF Data Upload

<u>**Step Action**</u>

1. Select the *Assets and Documents* button.
2. Select the *Download Assets* button. The system downloads a spreadsheet with all assets.
3. Open the spreadsheet and make the desired CDF changes.
4. On the Schedule detail page; select the *Upload/Check File* button.
5. Navigate to, and select the spreadsheet file.
6. Select the *Open* button.
7. The system displays a message indicating that the upload was successful, sends an email requesting approval of the changes to the local user with CDF Approval permissions, and displays a warning symbol indicating a change has been requested but not yet approved.

Note: Changes are not displayed until the change has been approved by a manager with approval permissions.

Note: For users with CDF Approval permissions requesting the CDF changes, the changes are automatically approved and applied (refresh the browser to view results).

View pending CDF data changes from the **Pending CDF Requests** section of **myTransactions**. An (*exclamation point*) is displayed on the **myTransactions** tab if a user has pending actions.

View applied changes to CDFs from the **CDF Request History** section of **myTransactions**.

13. CSI Data Management

13.1 Request to change CSI data on an asset

Users with appropriate permissions can request changes to CSI data – Customer Reference or equipment location fields.

Permissions needed: Edit CSI Asset Data

CSI data change requests can only be initiated one asset at a time.

Approval of changes can be done on multiple assets from the **myTransactions** page.

Step Action

1. From the Asset detail page, select the *Edit CSI Data* button.
2. Enter the data in the applicable fields.
3. Select the *Submit* button.
4. The system displays a message indicating that the submitted change was successful, sends an email requesting approval of the changes to a user with Approve CSI Data Change permissions, and displays a warning symbol indicating a change has been requested but not yet approved.

The *Edit CSI Data* button becomes inactive until the changes are updated in the CSI source system.

Note: Changes are sent to CSI once the change has been approved by a manager with approval permissions.

Note: For users with CSI Data Change Approval permissions, the changes are automatically approved and sent to CSI.

Note: Once changes to CSI data are approved, the system sends an email to CSI with details of the requested changes. After the changes are made in the CSI backend leasing system, MyCSI will be automatically updated with the changes. Until those changes are applied, the status will be displayed as ***Pending***.

View pending CSI data change requests from the **Pending Requests** section of **myTransactions**. An (*exclamation point*) is displayed on the **myTransactions** tab if a user has pending actions.

View approved CSI data change requests from the **Request History** section of **myTransactions**.

13.2 Approve or Decline Requests

Users with appropriate permissions can approve or decline requests for changes to CSI data.

Permissions needed: Approve CSI Asset Data Change

Refer to **myTransactions** Section 6 for Approve and Decline processes.

14. Export Data

Use the export feature to export data from MyCSI.

Using the buttons on the right exports all the information available for a specific section. Using the options on the left exports selected information for the specific section.

14.1 Export Pending Requests or Request History data

Export data from the **Pending Requests or Request History** page for a summary of request data.

Information in the export file includes: Asset, Type, Status, Submitted By, Lease End Date, Submit Approval User, Submit Approval Date, Terms Set By, Terms Set Date, Terms Accepted By, Terms Accepted Date, Denied By, and Denied Date.

Step Action

1. From the **myTransactions Pending Requests** or **Request History** page, select the *Excel* or *CSV* button on the right to export **all** request information.

14.2 Export CDF Request History data

Export data from the **CDF Request History** page for a summary of historical changes to CDF data.

Information in the export file includes: Changes, Serial No., Model, Schedule, Lease End Date, Submitted By, and Date Submitted.

Step Action

1. From the **myTransactions CDF Request History** page, select the *Excel* or *CSV* button on the right to export **all** CDF changes information.

14.3 Export Schedule, Asset or Invoice data

Please reference **Section 3** for exporting Schedule data.

Please reference **Section 4** for exporting Asset data.

Please reference **Section 5** for exporting Invoice data.

15. Getting Help

For additional assistance, please contact your local MyCSI administrator or your CSI account executive.

16. Appendix

16.1 Permission Definitions

Permission	Definition
Culture	**User configuration** Used to determine the language and formatting that MyCSI labels and various messages are displayed
Asset Data Only	**User permission** Used to restrict a user's access to limited asset information: Master Lease No., Schedule, Serial No., Manufacturer, Model, Customer Reference, Billing Address, Equipment Location, CDFs **Note:** When this permission is checked, users are denied access to Invoices regardless of whether the View Invoices permission is granted Users with this restriction will have access to limited Schedule information: Lessee Name, Lease No., Schedule, Account Executive, Term Expiration
Locked	**User permission** Used to make a user account inactive The system will also automatically lock an account after five (5) unsuccessful login attempts. Users should contact their local administrator to unlock the account
Approve Buyout	**Typical customer administrator or asset manager permission** Users with this permission can approve or decline requests to purchase equipment and then approve or decline the pricing terms provided by CSI **Note:** When a user with **Approve Buyout** permission submits a Buyout request, the change is automatically approved and forwarded to CSI for pricing
Approve CSI Data Change	**Typical customer administrator or asset manager permission** Users with this permission can approve or decline requests to change CSI data CSI data changes include Customer Reference and equipment location Once the requested changes are approved by the customer, the request is forwarded to CSI to apply the changes in the leasing system **Note:** When a user with **Approve CSI Data Change** permission submits a CSI data change request, the change is automatically approved and forwarded to CSI to enter into the backend leasing system
Approve Extension	**Typical customer administrator or asset manager permission** Users with this permission can approve or decline requests to extend or renew end-of-lease equipment Once the request is approved by the customer, the request is forwarded to CSI **Note:** When a user with **Approve Extension** permission submits an extension request, the change is automatically approved and forwarded to CSI

16.1 Permission Definitions

Permission	Definition
Approve Returns	**Typical customer administrator or asset manager permission** Users with this permission can approve or decline requests to return end-of-lease equipment Once the request is approved by the customer, the request is forwarded to CSI **Note:** When a user with **Approve Returns** permission submits a Return request, the change is automatically approved and forwarded to CSI
CDF Approval	**Typical customer administrator or asset manager permission** Users with this permission can approve or decline requests to change CDFs **Note:** When a user with **CDF Approval** permission submits a CDF change request, the change is automatically approved and changes applied
CDF Data Upload	**Typical customer permission** Users with this permission can upload CDF data changes via spreadsheet Allows users to update large quantities of assets at one time
CDF Entry	**Typical customer permission** Users with CDF Entry permission can submit change requests to CDFs on assets either individually or in-line
Change Passwords	**Typical administrator permission** Users with this permission can reset passwords for users that they have access to
Communicate Internally	**Typical customer permission** Users with this permission can communicate internally Users can include specific assets and comments as part of the communication All internal communications are available from the **Request History** section of **myTransactions**
Create Customer Users	**Typical administrator permission** Users with this permission can create and manage user accounts for their organization
Edit CSI Asset Data	**Typical customer permission** Users with this permission can submit change requests to CSI data CSI data changes include Customer Reference and equipment location
Label CDFs	**Typical customer administrator permission** Users with this permission can manage the CDF labels available for use
Maintain Email Templates	**Typical administrator permission** Users with this permission can customize the email templates used in the communications of the various transactions

16.1 Permission Definitions

Permission	Definition
Request Buyout	**Typical customer permission** Users with this permission can request pricing information to purchase equipment currently on lease
Request Extension	**Typical customer permission** Users with this permission can request to extend/renew equipment currently on lease
Request Return	**Typical customer permission** Users with this permission can request to return equipment currently on lease
View Invoices	**Typical user permission (US/Canada users only)** Users with this permission can view invoices associated with their account **Note:** Users with Asset Data Only permission checked are denied visibility to invoices even if this permission is checked
View Portfolio Information	**Typical user permission** Users with this permission can view Schedule and asset information associated with their account
Filter Portfolios	**User permission** Users with this permission are limited to information associated with the Portfolio assigned to them Portfolio assignment is for the primary CSI subsidiary that the user does business with **Note:** Some users will be granted access to information for their subsidiaries doing business with CSI subsidiaries Access to subsidiary information will be granted using this filter
Filter Leases	**User permission** Users with this permission are limited to the information associated with the MLA assigned to them
Filter Schedules	**User permission** Users with this permission are limited to the information associated with the Schedules assigned to them
Filter <**Key CDF**>	**User permission** Users with this permission are limited to the information associated with the assets identified by the "**Key CDF**" field

16.2 Transaction Statuses

Status	Definition
Submit Approval	Requests submitted for return, buyout, or CSI Data change that are waiting for customer approval
Set Terms	Request for buyout has been approved by the customer, waiting for CSI to set the terms of the buyout
Term Acceptance	CSI has set the terms of the equipment buyout request, waiting for the customer to accept the terms of the buyout
Pending CSI	Waiting manual change in the CSI source system and nightly process to finalize
Complete	Requested change has been made in the CSI source system and the nightly process has run
Declined	Customer with approval permissions has declined the request for Return, Buyout, or CSI Data change

16.3 Typical User Permissions

The following are suggestions for permission levels.

Please note that permissions are customizable and can be assigned as needed for individual users.

US/Canada users

Customer Admin – US/Canada – includes Approve Buyout, Approve CSI Data Change, Approve Returns, Approve Extension, CDF Approval, CDF Data Upload, CDF Entry, Change Passwords, Communicate, Create Customer Users, Edit CSI Asset Data, Label CDFs, Maintain Email Templates, Request Buyout, Request Return, View Invoices, and View Portfolio Information

Customer Manager – US/Canada – includes Approve Buyout, Approve CSI Data Change, Approve Returns, Approve Extension, CDF Approval, CDF Data Upload, CDF Entry, Communicate, Edit CSI Asset Data, Request Buyout, Request Return, View Invoices, and View Portfolio Information

Customer User – US/Canada – includes CDF Data Upload, CDF Entry, Communicate, Edit CSI Asset Data, Request Buyout, Request Return, View Invoices, and View Portfolio Information

Non-US/Canada users

Customer Admin – International – includes Approve Buyout, Approve CSI Data Change, Approve Returns, CDF Approval, CDF Data Upload, CDF Entry, Change Passwords, Communicate, Create Customer Users, Edit CSI Asset Data, Label CDFs, Maintain Email Templates, Request Buyout, Request Return, and View Portfolio Information

Customer Manager – International – includes Approve Buyout, Approve CSI Data Change, Approve Returns, CDF Approval, CDF Data Upload, CDF Entry, Communicate, Edit CSI Asset Data, Request Buyout, Request Return, and View Portfolio Information

Customer User – International – includes CDF Data Upload, CDF Entry, Communicate, Edit CSI Asset Data, Request Buyout, Request Return, and View Portfolio Information

17. Hints & Tips

Contact your local MyCSI administrator for a password reset

Use the Advanced Search feature to receive more targeted results

From **myInvoices**, in Advanced Search, select the ***Due Within 90 Days*** link to quickly enter a 90 date range in the Payment Due Date fields

View pending CDF changes from the **Pending CDF Requests** section of **myTransactions**

View applied changes to CDFs from the **CDF Request History** section of **myTransactions**

View approved asset return requests from **Request History** section of **myTransactions**

View approved asset purchase requests from the **Request History** section of **myTransactions**

View internal communications from the **Request History** section of **myTransactions**

View approved CSI data change requests from the **Request History** section of **myTransactions**