



#WeAreExclusive





#WeAreExclusive



# Kundenportal

🏠 Home

## Welcome to your Customer Portal.

This secure, web-based tool is designed with you in mind to provide full visibility on your customers' site-specific order tracking data. In the future, this portal will be enriched with a wide array of tools to help you manage your sales and customer relationships.



**Max Mustermann**



👤 Logged in as Muster Reseller GmbH – C0015005

### YOUR FEATURES



#### Track Orders

Maximum transparent logistics



#### View Invoices

Invoices and settlements in one place



#### More to come

Stay tuned



#### More to come

Stay tuned



# Exclusive Access – Order Tracking

## Status

### All:

- alle eingegangenen Bestellungen

### Pending:

- vom Sales-Team bereits erfasst

### Confirmed:

- vom Order Management-Team erfasst und die PO an den Hersteller wurde ausgelöst

### Partially Fulfilled:

- Teillieferungen

### Fulfilled:

- Waren versandt und Rechnung erstellt

### ETA:

- voraussichtliches Versanddatum (Exclusive Networks Lager)

## Track Orders

Welcome to your Order Tracking Dashboard. To view relevant details of your active orders, you can use the search bar to locate a specific order, select an order within the dashboard, or export an Excel report of your orders.

All ETA date information available in the order tracking database is provided by the vendor and subject to change.

All 99+ Pending 3 Confirmed 8 Partially Fulfilled 4 Fulfilled 99+

Order number, end user details, ship to city, vendor name...

Filter

Export

Order Number End User ETA Vendors Status

PO1000002  
(SODE0100001002)

End User Name

FORTINET

PENDING

XLS

PO1000001  
(SODE0100001000)

End User Name

20.1.2023

PALOALTO

FULFILLED

XLS

Transaction Date	15.3.2023	Sales Rep	EXN Salesperson	Items Count	4
Actual Ship Date	15.3.2023	Carrier Name	DHL	Tracking Number	030010020030040050060
Ship To Country	Germany	Ship To City	Musterstadt		

### Ship To

Musterfirma GmbH Co. & KG Musterstraße 12 10023 Musterstadt Germany



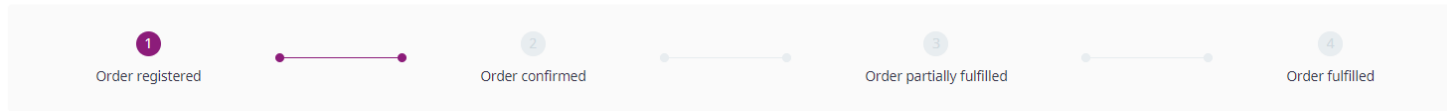
SEE MORE >



# Exclusive Access – Order Tracking

## › Detaillierte Ansicht

Order #SODE010001050



### Order Items

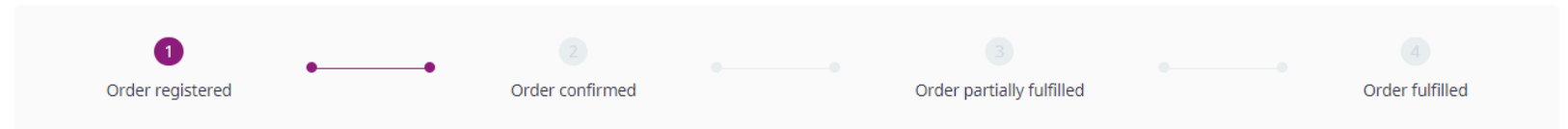
Export

Line#	Item Name	Quantity	ETA	Actual Ship Date	Vendor	
1	FC-10-03007-108-02-12	2	5.11.2022	9.11.2022	FORTINET	▼
2	FC-10-03007-247-02-12	2	15.11.2022	9.11.2022	FORTINET	▼

Line#	Item Name	Quantity	ETA	Actual Ship Date	Vendor	
-------	-----------	----------	-----	------------------	--------	--

1	FC-10-03007-108-02-12	2	5.11.2022	9.11.2022	FORTINET	▲
---	-----------------------	---	-----------	-----------	----------	---

<b>Status</b>	Delivered	<b>ETA</b>		<b>Actual ship date</b>	9.11.2022
<b>Item description</b>	FortiGate-3000D 1 Year FortiGuard IPS Service	<b>Serial numbers</b>	FG3000DFT922900007 FG3000DFT922900009	<b>Tracking number</b>	030010020030040050060





# Order Tracking suchen/filtern

All 99+ Pending 1 Confirmed 6 Partially Fulfilled 3 Fulfilled 99+

🔍 Type to search for order #, enduser name...

Filter

Export

## ➤ Suchen nach

- Bestellnummer
- Endkunde

## ➤ Filtern nach

- Hersteller(n)
- ETA Datum/-zeitfenster
- Bestelldatum/-zeitfenster
- Versanddatum/-zeitfenster

### Advanced filters

Vendors

EXCLUSIVE X TRAINING EXN X

ETA date

Pick date range

Order creation date

Nov 1, 2022 - Nov 30, 2022 X

Actual : November 2022

Pick

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Apply

ERSITÄTSKLI  
URG

Fulfilled



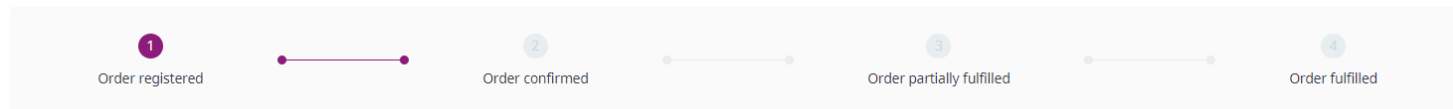
# Order Tracking – Daten exportieren

## › Ansicht einer Bestellung

The screenshot shows a navigation bar with status filters: All (99+), Pending (3), Confirmed (8), Partially Fulfilled (4), and Fulfilled (99+). Below the filters is a search bar with the placeholder text "Order number, end user details, ship to city, vendor name...". To the right of the search bar are two buttons: "Filter" and "Export". The "Export" button is circled in orange.

## › Line Ebene

Order #SODE010001050



### Order Items

Line#	Item Name	Quantity	5.11.2022	9.11.2022	Actual Ship Date	Vendor	
			15.11.2022	9.11.2022			
1	FC-10-03007-108-02-12	2			11.4.2022	FORTINET	▼
2	FC-10-03007-247-02-12	2			11.4.2022	FORTINET	▼

Export



# Exclusive Access – Invoices

## Status

### All:

- alle Rechnungen

### Current:

- Offene Rechnungen, die noch nicht fällig sind

### Overdue:

- Rechnungen, die überfällig sind

### Paid:

- Ausgeglichenen Rechnungen

**TIPP:** In Chrome kann man eine **offene Posten Liste** ziehen, indem man auf „Current“ klickt, Strg. gedrückt hält, und dann auf „Overdue“ klickt. Danach kann man die Liste exportieren.

## View Invoices

View Invoices

All 99+ Current 8 Overdue 0 Paid 99+

Q Invoice number, order number, end user details... Filter Export

Invoice No.	End User	Due Date	Status	Gross Amount	Currency	
INDE0100100010 Order No PO1000002	End User Name End User Contact	19.4.2023	CURRENT	943.31	EUR	PDF >
INDE0100100009 Order No PO1000001	End User Name End User Contact	14.4.2023	CURRENT	15,580.48	EUR	PDF ^
Type	Invoice	Reference No.	PO010000001	Invoice Date	15.3.2023	
Net Amount	13,092.87	Amount Paid	0.00	Amount Due	15,580.48	
Memo	Invoice Memo	Additional Reference				
INDE010021683 Order No 2000783822	End User Name End User Contact	12.4.2023	CURRENT	4,319.98	EUR	PDF >



# Invoices – Daten exportieren

- › **Kopie der Rechnung als PDF ziehen**

INDE0100100010 Order No PO1000002	End User Name End User Contact	19.4.2023	CURRENT	943.31	EUR	
--------------------------------------	-----------------------------------	-----------	---------	--------	-----	--

- › **Überblick aller Rechnungen als EXL exportieren**
- › **Vorsortierte Liste kann auch exportiert werden**

### View Invoices

All Current Overdue Paid

Invoice No.	End User	Due Date	Status	Gross Amount	Currency
-------------	----------	----------	--------	--------------	----------





# Personalisierung der Tabelle

- ▶ Welche Information man als erstes sieht, kann man in jedem Feature individuell gestalten
- ▶ Bis zu sieben (7) Spalten können ausgewählt werden. Die restlichen Daten sind noch ersichtlich, wenn die Transaktion aufgeklappt wird

## Column selection ✕

Please select which fields should be visible in table header. Others will be accessible in the details view of a row.

- |   |  |
|---|--|
| <input type="checkbox"/> Type                   | <input checked="" type="checkbox"/> Status       |
| <input checked="" type="checkbox"/> Invoice No. | <input type="checkbox"/> Net Amount              |
| <input type="checkbox"/> Reference No.          | <input checked="" type="checkbox"/> Gross Amount |
| <input checked="" type="checkbox"/> End User    | <input type="checkbox"/> Amount Paid             |
| <input type="checkbox"/> End User Contact       | <input type="checkbox"/> Amount Due              |
| <input type="checkbox"/> End User Email         | <input checked="" type="checkbox"/> Currency     |
| <input type="checkbox"/> Invoice Date           | <input type="checkbox"/> Memo                    |
| <input checked="" type="checkbox"/> Due Date    | <input type="checkbox"/> Additional Reference    |

Reset all

Apply

All 99+ Current 56 Overdue 0 Paid 99+

🔍 Invoice number, order number, end user details... Filter Export

Invoice No.	End User	Due Date	Status	Gross Amount	Currency	☰
-------------	----------	----------	--------	--------------	----------	---



# Exclusive Access

- › Link: [de.access.exclusive-networks.com](https://de.access.exclusive-networks.com)
- › Weitere Features ab Q2 2023 geplant

# Exclusive Access Kontakt

## Sie benötigen Hilfe oder haben Feedback für uns?

- › Sie können sich wie gewohnt an Ihren Exclusive Networks Accountmanager wenden oder direkt an das Exclusive Access Team: [DACH.ExclusiveAccess@exclusive-networks.com](mailto:DACH.ExclusiveAccess@exclusive-networks.com)



#WeAreExclusive

