



#WeAreExclusive



**EXCLUSIVE
ACCESS**



Features



Order Tracking

Invoices

Users List

Quotes



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EXCLUSIVE ACCESS Customer Portal

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



Browse Quotes

All quotes in one place



See Available Inventory

Your insight into our warehouse



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Order Tracking



Exclusive Access – Order Tracking

Status

All:

- All orders

Pending:

- Processed by the sales team

Confirmed:

- Processed by the order management team and PO sent to the vendor

Partially Fulfilled:

- Orders with outstanding items

Fulfilled:

- Orders delivered and invoiced

ETA

- Estimated ship date from our warehouse

Order Tracking

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 99+ Pending 39 Confirmed 78 Partially Fulfilled 15 Fulfilled 99+

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

🔽 Filter

📄 Export

Order number	End user	ETA	Vendor(s)	Status	
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PO1000001 (SODE0100001000)	End User Name	22.1.2023	PALOALTO	Fulfilled	
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PO1000002 (SODE0100001002)	End User Name	20.1.2023	PALOALTO	Fulfilled	
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Order creation date:	12.11.2021	Sales rep:	EXN Salesperson	Number of order items:	6
Actual ship date:	17.2.2022	Carrier name:	DHL	Tracking number:	030010020030040050060
Ship to country:	Germany	Ship to city:	Musterstadt	Ship to address:	Musterfirma GmbH Co. & KG Musterstraße 12 10023 Musterstadt Germany

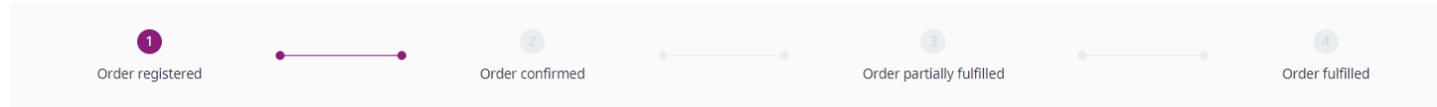




Exclusive Access- Order Tracking

› Detailed View

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





Order Tracking – Search & Filter

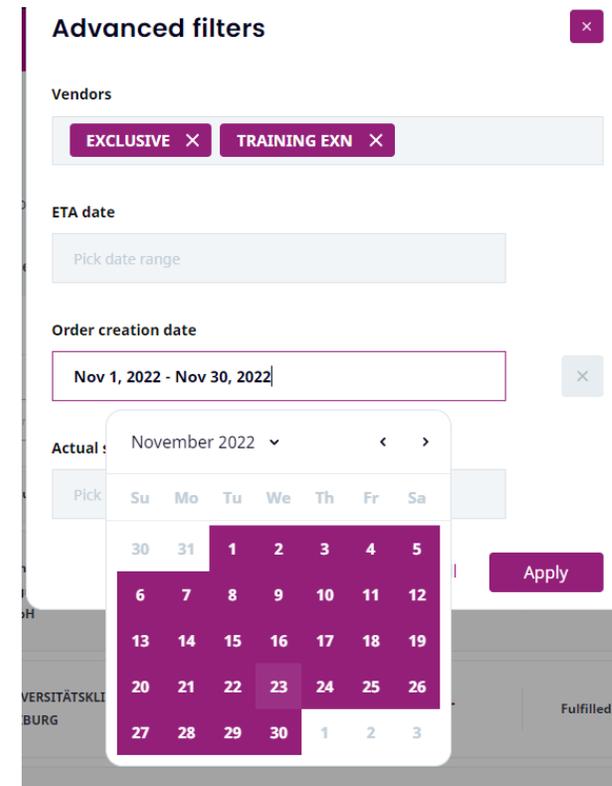


➤ Search according to

- Order number
- End user

➤ Filter according to

- Vendor(s)
- ETA date or timeframe
- Order date or timeframe
- Ship date or timeframe





Order Tracking – Export Data

› Order View

All

99+

Pending

1

Confirmed

6

Partially Fulfilled

3

Fulfilled

99+

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

🔽 Filter

📄 Export

› Line-level View

Order #SODE010001050



SEE MORE>

1

Order registered

2

Order confirmed

3

Order partially fulfilled

4

Order fulfilled

Order Items

📄 Export

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



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Invoices



Exclusive Access – Invoices

Status

All:

- All invoices

Current:

- Outstanding invoices not past their due date

Overdue:

- Outstanding invoices that are past their due date

Paid:

- Paid invoices

TIPP: If using Chrome, you can pull an **outstanding invoice list** by clicking on "Current", holding down the SHIFT button and then clicking on "Overdue". Then you can export this list.

View Invoices

View Invoices interface showing a list of invoices with filters and a summary table.

Filters: All (99+), Current (8), Overdue (0), Paid (99+)

Search: 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 – Export Data

- › Retrieve a PDF copy of the invoice

INDE0100100010 Order No PO1000002	 End User Name End User Contact	19.4.2023	CURRENT	943.31	EUR	 
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- › Export an overview of all invoices to Excel
- › Pre-filtered lists can also be exported

View Invoices

All  Current  Overdue  Paid 

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



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Personalisierte Ansicht



Personalized View

- ▶ The overview columns shown on the main screen can be personalized in each feature
- ▶ You can choose up to seven (7) columns. The remaining details are still available once the transaction tab is opened

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	☰
-------------	----------	----------	--------	--------------	----------	---



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Users List



Users List

- **Admin Users can:**
 - Add/Delete Users
 - Allow/Restrict Feature access
 - Reset MFA
- **Tip:**
 - More than one admin user is allowed per account

Users List

All user accounts which are registered in the system. Grant or revoke access to specific features and create new accounts.

Name and e-mail	Is Admin	Privileges
 Doe, Jane ✉ janedoe@resellerabc.com		 Access to some features 
 Mustermann, Max ✉ maxmustermann@resellerabc.com		 Access to all features 



Users List – New Users

- Click on “New User” to create a new user

Users List

All user accounts which are registered in the system. Grant or revoke access to specific features and create new accounts.

Filter New User

Name and e-mail	Is Admin	Privileges
 Doe, Jane ✉ janedoe@resellerabc.com		 Access to some features 
 Mustermann, Max ✉ maxmustermann@resellerabc.com		 Access to all features 
 Schmidt, Manuela ✉ manuelaschmidt@resellerabc.com		 Access to all features 

Results per page << < Page of 1 > >> Showing items 1–3 of 3



Users List – New Users

- **Only first name, last name and an email address are necessary**
- **Select desired feature access**
- **Once a new user has been created, they will receive an automated activation email**
- **The new user should click on “Forgot Password” to set a new password**

Create a new User ✕

First Name

Last Name

E-mail Address

Privileges

Feature	Access
 Track Orders Maximum transparent logistics	<input type="checkbox"/>
 View Invoices Invoices and settlements in one place	<input type="checkbox"/>



Edit/Delete Users

- Click on the eye symbol to edit a user's access

Users List

All user accounts which are registered in the system. Grant or revoke access to specific features and create new accounts.

Search: Filter [New User](#)

Name and e-mail	Is Admin	Privileges	
 Doe, Jane ✉ janedoe@resellerabc.com		 Access to some features	
 Mustermann, Max ✉ maxmustermann@resellerabc.com		 Access to all features	
 Schmidt, Manuela ✉ manuelaschmidt@resellerabc.com		 Access to all features	

Results per page:  << < Page of 1 > >> Showing items 1-3 of 3



Edit/Delete Users

- Use the check marks under "Access" to select the desired feature access
- To delete a user, click on "Delete User" at the bottom of the page

User's Privileges

DJ Doe, Jane

Feature		Access
	Track Orders Maximum transparent logistics	<input checked="" type="checkbox"/>

 Delete User

Cancel



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Quotes



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Quotes



Exclusive Access – Quotes

Status

All:

- All requested offers

Open:

- Valid quotes

Processed:

- Quotes with a placed order

Expired:

- Open quotes with expired validity dates

Closed:

- Past quotes with no sales order placed

Browse Quotes

All **4** Open **1** Processed **3** Expired **0** Closed **0**

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

Filter

Export

Quote Number	End User	Total Amount	Status	Quote Date	Expiry Date	
QDE010046334 EXN/Reseller ABC/End User XYZ/Training/202... (v.1 - current)	End User XYZ GmbH erika.musterfrau...	2,625.00	OPEN	29.6.2023	31.7.2023	PDF XLS
QDE010046315 FTN/Reseller ABC/End User XYZ/20230519 (v.1 - current)	End User XYZ GmbH erika.musterfrau...	75,851.00	PROCESSED	19.5.2023	30.6.2023	PDF XLS
QDE010046317 EXT/Reseller ABC/End User XYZ/Renewal/202... (v.1 - current)	End User XYZ GmbH erika.musterfrau...	3,328.60	PROCESSED	25.4.2023	18.6.2023	PDF XLS



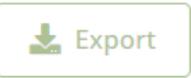
Quotes – Search/Filter

- You can search your quotes according to status, end user, vendor, etc. by entering key words into the search bar
- Toggle between the status options to view quotes according to status

Browse Quotes

All **4** Open **1** Processed **3** Expired **0** Closed **0**

🔍 Quote number, end user details, ship to city, vendor name...





Quotes – Export Data

- A list of quotes can be exported by clicking on the “Export” button
- Individual quotes can be exported and downloaded in a PDF or Excel format

Browse Quotes

All **4** Open **1** Processed **3** Expired **0** Closed **0**

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

Filter

Export

Quote Number End User Total Amount Status Quote Date Expiry Date

QDE010046334
EXN/Reseller
ABC/End User
XYZ/Training/202...
(v.1 - current)

End User XYZ
GmbH
erika.musterfrau...

2,625.00

OPEN

29.6.2023

31.7.2023

PDF

XLS





Quotes – Detailed View

Quote EXN/Reseller ABC/End User XYZ/Training/20230629 ✕

[Download in .pdf](#) [Download in .xls](#)

EXN Contact ✉ Linda De Gori **Quote Date** 29.6.2023 **Expiry Date** 31.7.2023

Reference EXN/Reseller ABC/End User XYZ/Training/20230629 **End User** End User XYZ GmbH **Ship To** Reseller ABC GmbH Musterstraße 17 12345 Musterstadt Germany

Quote Items (2)

Line#	Item	Quantity	Amount	Currency	Vendor	
1	P-TR001-1P-EW-0001	2	750.00	EUR	EXCLUSIVE	>
2	P-TR008-1P-PA-0001	5	1,875.00	EUR	EXCLUSIVE NETWORKS	>

Total: 2,625.00 EUR

Expiry Date ⬇ ☰

31.7.2023 PDF XLS 📄

To open the details of the quote, click on these symbols



Exclusive Access

- ▶ **Link:** ch.access.exclusive-networks.com

Exclusive Access Contact

Do you need help or have feedback for us?

- ▶ **You can contact your designated Exclusive Networks account manager or you can send an email directly to the Exclusive Access Team at:** DACH.ExclusiveAccess@exclusive-networks.de



Danke