



#WeAreExclusive



EXCLUSIVE
ACCESS



Features



Order Tracking

Invoices

Users List

Quotes



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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

PO1000001
(SODE0100001000)

End User Name

22.1.2023

PALOALTO

Fulfilled



PO1000002
(SODE0100001002)

End User Name

20.1.2023

PALOALTO

Fulfilled



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

1

Order registered

2

Order confirmed

3

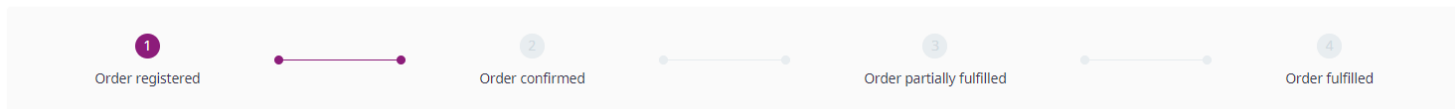
Order partially fulfilled

4

Order fulfilled



➤ Detailed View

 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
<div><div>StatusDelivered</div><div>ETA</div><div>Actual ship date9.11.2022</div><div>Item descriptionFortiGate-3000D 1 Year FortiGuard IPS Service</div><div>Serial numbersFG3000DFT922900007 FG3000DFT922900009</div><div>Tracking number030010020030040050060</div></div> <div><div>1Order registered</div><div>2Order confirmed</div><div>3Order partially fulfilled</div><div>4Order fulfilled</div></div>					



Order Tracking – Search & Filter

Order Tracking Interface:

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

Search:

Buttons: Filter Export

- **Search according to**
 - Order number
 - End user
- **Filter according to**
 - Vendor(s)
 - ETA date or timeframe
 - Order date or timeframe
 - Ship date or timeframe

Advanced filters

Vendors: EXCLUSIVE X TRAINING EXN X

ETA date:

Order creation date: X

Actual: November 2022

Calendar:

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

Buttons: Apply



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			
			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	▼



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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

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 – 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	 
--------------------------------------	-----------------------------------	-----------	---------	--------	-----	---

- › Export an overview of all invoices to Excel
- › Pre-filtered lists can also be exported

View Invoices

All  Current  Overdue  Paid 

  Export

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 56Overdue 0Paid 99+

Q 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.

<input type="text" value=""/>			<button>Filter</button>	<button>New User</button>
Name and e-mail	Is Admin	Privileges		
<div>DJ</div> <div>Doe, Jane</div> <div>✉ janedoe@resellerabc.com</div>	<div>✖</div>	<div>● Access to some features</div>	<div>👁</div>	
<div>MM</div> <div>Mustermann, Max</div> <div>✉ maxmustermann@resellerabc.com</div>	<div>✔</div>	<div>● Access to all features</div>	<div>👁</div>	



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 30

« < Page 1 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

☐

View Invoices

Invoices and settlements in one place

☐





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.

<input type="text"/>			Filter	New User
Name and e-mail		Is Admin	Privileges	
<div>DJ</div> <div>Doe, Jane</div> <div>✉ janedoe@resellerabc.com</div>		✖	● Access to some features	
<div>MM</div> <div>Mustermann, Max</div> <div>✉ maxmustermann@resellerabc.com</div>		✔	● Access to all features	
<div>SM</div> <div>Schmidt, Manuela</div> <div>✉ manuelaschmidt@resellerabc.com</div>		✔	● Access to all features	
Results per page <input type="text" value="30"/>		« < Page <input type="text" value="1"/> 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

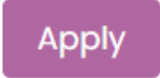
User's Privileges



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

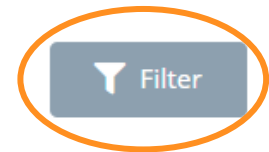


Quotes – Search/Filter

- 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





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