Fellowes Sales Portal FAQ

User Accounts & Logins

1. ***How can we make sure that you have all our admin email addresses so that they get the email link?***
   - All users that have placed an order within the last 12 months will receive an email. If they do not receive one, they can contact customer service.

2. ***In our office, we have multiple admin personnel that enter orders, will we all be able to create a user account, or should we just have 1 person create the account?***
   • Every individual person that places orders for your dealership will have their own individual username and password. We prefer users not to share accounts into our system.

3. ***How do I get a username/ password if I do not receive an email?*** • First check your spam or junk email for sender noreply@SalesPortal.Fellowes.com
   - Or contact Fellowes Customer Services Team who will manage your onboarding process and ensure you receive an email with user login details.

4. ***Who should we email to update the admin email address?*** • Any changes to or requests for new users should be sent to our Customer Services team and they will manage on your behalf.

Customer Accounts & Sites 1. *Will account names that we have in Trendealer be populated here?* • Yes, Trendealer account numbers have been migrated into the new system. There has been some consolidation of multiple customer accounts for the same physical customer.

2. ***Will existing ship to locations be imported?***
   - Yes, all active ship to locations have been imported into new system.

3. ***Can we manually assign a salesperson's name?*** • No, the salesperson name, rep group and rep name are automatically assigned from the customer account selected.

4. ***Are all Fellowes vendors using this method for Order Entry or is it just for Fellowes Quincy (Trendway) ordered products?***
   - All direct customers of Fellowes Quincy business will use this system.

TXT / SIF File 1. *What if I don't have*

a SIF file?

   - You can enter line items manually.

2. ***When design sends us the SIF file will they now be sending TXT files?***
   - Yes, our design team will send as a TXT or SIF file.

3. ***Can we add additional SIF/ TXT files on to one order?*** • Yes, you can import multiple SIF (TXT) files onto the same quote where new line items will be added.

4. ***Can we combine a SIF / TXT file and manual lines onto a single quote?***
   • Yes, you can.

5. ***Is the file that we change to TXT the same SIF file we have used in the past?***
   • Yes, the original SIF file is the same format as you are used to today,

6. ***Do we have to use the Fellowes specific SIF file before we must change it to a TXT file?***
   • Yes.

7. ***Why do we have to change the SIF file to TXT file?*** • Our new Oracle based CPQ Sales Portal currently only accepts the file as a TXT extension. We are talking to Oracle to try get this change on their roadmap for the future.

8. ***Why do we need both the TXT and SIF file?*** • All design software creates SIF files by default so these file types will remain in play.
   • Our new Oracle based CPQ Sales Portal currently only accepts the file as a TXT extension.

9. ***After converting SIF to TXT does the column bldg. still upload from 20/20 worksheet with our Tags appearing on the order?***
   • Yes, all tag columns will import and appear on the quote as they did previously.

10. ***Can the Fellowes SIF or TXT file be exported from design software?*** • Yes, Project Spec will allow TXT export and the file will load into our new Sales Portal.
    • We are testing the file export capabilities other design software currently and will provide feedback.

11. ***What can we do if we experience issues importing the TXT file?*** • Contact our Customer Services team and they will assist with any help needed.

12. ***Can we change the filename within 2020 worksheet and then rename to TXT?*** • Export the Trendway.SIF from 2020 worksheet, then change the file extension from SIF to TXT.

13. ***Is this compatible with Design Manager?***
    • Any program that exports a SIF should be compatible.

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Trendealer Portal

1. When will Trendealer be moving offline? • Trendealer Portal will still be around for a while yet. Dealers will be able to find the link to "Place an Order" into this new system and also view sales order history from the old system (pre-May 2023 orders).

2. **_Will we still have access to orders processed in Trendealer?_** • Yes, all order history for orders placed before 8th May 2023 will still be available in Trendealer portal.

3. **_Will we still use the same Trendealer logins?_** • Yes, but only to log into Trendealer itself. To access the New Sales Portal to place your quote/order – you will use a new username and password.

4. **_Will we be able to print acknowledgements and packing lists from this system as we can from Trendealer?_**
   - Dealers will not be able to view or print your own acknowledgements and packing lists day 1 in the new system. The Sales Portal will be for quotation placement.
   - There is another new Fellowes system under development to eventually replace Trendealer portal. This new system will allow dealer to allow New Sales portal order history and eventually view and print customer facing documents.

General

1. **_What are all the different status types and their meanings?_**
   - In progress   = quote is entered, not yet submitted
   - Pending   = has been submitted to order entry team
   - Ordered = has progressed to scheduling team. Once the scheduling team has finalized the scheduled ship date, the user will receive an order acknowledgement with the SSD, but the status of "ordered" will not change in CPQ

2. **_Is there a dedicated person whom dealers can contact should they have any issues during the quote placement process?_**
   - All requests for system help or general requests should be sent to our Customer Services team.

3. **_How are changes, additions, deletions addressed once quote is submitted and it becomes an order?_**
   - Once the quote is submitted, all order change requests must be submitted to our Customer Services team – who will help with your request.

4. **_If an order needs to be updated after acknowledgement, is it done through the system?_**
   - Once the quote is submitted, all order change requests must be submitted to our Customer Services team – who will help with your request.

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5. *Is there a way to delete old quotes?*
   - Yes, select the quote and move to trash (lower left corner is the move button)

6. *Can I cancel an order in the portal or do I call CS to cancel?*
   a. If the order has a status of In Progress, yes. Click "Cancel Quote" in the upper right corner of the order.
   b. If the order has a status of Pending Order: This functionality should be available within the next 1-2 days. Click "Cancel Quote" in the upper right corner of the order.
   c. If the order has a status of Ordered, it has been submitted to Scheduling and cannot be cancelled from within CPQ. Please contact Customer Service.

7. *Can I reopen a previously cancelled quote?* • No, a cancelled quote cannot be re-opened, however, a cancelled quote can be copied to start a new quote.

8. *Why does it show multiple versions of each order?*
   After an order is submitted, our Order Entry Specialists will review the order and may need to make adjustments, such as updating the SPA, adding Specials details, etc.

   To be able to do that, we need to create a revised version of the order, so you may see that the original version was "rejected" and a new version created.

   Order Entry will submit the updated version and you should receive a revised Order Confirmation via email.

9. *Can you search by product line for items?*
   - There is a Search function (See User Guide).

10. *What is the agency code on the "Quote Information" header tab?*
    - It is the name of the end user for all contract orders.

11. **How will the alias tags show up?**
    - Each line item can have one tag.
    - The tag can either be imported on the TXT file or manually entered in Sales Portal. • There is the capability to group tag many line items in one go within Sales Portal.

12. *Will only one tag will show up on the order/ shipping labels?*
    - All tags per each line item will show on customer facing documents.

13. *Will we still be able to order custom length worksurfaces directly from the sales portal without getting a control number from the Specials team?*

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- The process for ordering customized Specials has not changed. Dealers must submit a Special Request Form found on Trendealer Portal Home page.

14. **How do we enter a standard "Special" in the new Sales Portal?** • Specials are entered as line items using the new Opportunity # issued by Fellowes.
    - The line item can then be configured using the configuration button (see user guide).
    - Multiple specials can exist on a single quote/order. Each one would have a unique Opportunity #.

15. **For federal orders, where do we upload a copy of the government orders?** • Comments and Attachments. To the right are spaces for up to 10 attachments.

16. **Does "Less Is More" need to be ordered separately from everything else or can they all be ordered together?**
    - LIM can be entered together on a single quote with other line items.
    - Users can attach multiple SPAs to a single order. SPA is entered at header level, but users can assign it to groups of or individual line items (see user guide).

17. **For federal orders with an SPA, will we be able to apply the SPA as we did on the old system, or do we have to go to invoice comments?**
    - By selecting Order Type of Federal and a Contract type as GSA, then users would be able to apply the GSA SPA field and would not need to put the SPA in the invoice instructions.
    - Users can attach multiple SPAs to a single order. SPA is entered at header level, but users can assign it to groups of or individual line items (see user guide).

18. **Can you change a finish or option after an order has been submitted but before it is scheduled for production?**
    - The dealer can change the quote at any time right up until you click SUBMIT, thereafter – you must contact our Customer Services Team for any further change requests.

19. **Will the finishes become part of the SKU or are they still on separate lines as now?** • The breakdown of the line item including configuration options and finishes are separated out as components within the parent item.

20. **Do we enter the opportunity number as the control number in the worksheet file?** • For specials, the Opportunity Number (beginning OPP-) has replaced the old control number.

21. **What if you have multiple opportunity numbers in one order?** • Multiple opportunities (special) can be entered as individual line items on a single order.

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22. **If you are double checking finishes, would you have to reconfigure every item? Or just wait for the acknowledgement?**
    - If checking before submitting the order, yes, you would have to reconfigure the items to check
    - You should always double check your acknowledgement

23. **Will there be a complete SKU on the acknowledgement?** • Yes, acknowledgements will show full line-item configuration, finishes & options on the order acknowledgement.

24. **In the past, only one discount program was permitted per order, has this now changed?**
    - SPA's can now be applied at the line-item level, so yes, multiple SPA's can be submitted on an order.

25. **Do punch list orders need to be entered as new quotes in this system, or would that be done through Customer Services team?**
    - If the original quote has already been submitted, additional items cannot be added to that order, but a new quote can be created for the additional items.
        - Our Customer Services Team will assist with trying to schedule them to ship together if lead-time allows.

26. **Is there a way to globally change finish options?**
    - Finish options need to be changed by individual line item.

27. **Do you have to approve pricing before submitting the order?** • Click "Save and Price" to validate and show your pricing including SPA discount. You can then click Submit to complete the quote.

28. **Can you save and come back to submit the order at a different time?** • Clicking "Save and Price" saves what you have done, and you can log out and then revisit later to complete and submit.

29. **Will any previously started but not completed quotes in the old portal be transferred to the new Fellowes Sales Portal?**
    - All open / unsubmitted quotes in the old system would need to be recreated in the new Fellowes Sales Portal.

30. **Can I attach direct purchase orders to quotes?** • In the Transaction / header section go to the "Comments & Attachments" tab and upload up to ten attachments.

31. **Will the new system auto-populate with our dealer and address information?** • You must select your customer account from a drop-down list. System will only offer you customer accounts and associated site level information appropriate to your user account and dealership(s).

32. **Can I review all line-item configuration & options at the same time?**
    - Individual line items can be viewed one by one on screen.

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- You can "print a proposal" from the "Customer Documents" tab of the header section. Ensure you select "Show Attributes Values" in the checkbox on the same screen.

33. **How do I ensure correct pricing is applied to my quote?** • A list price is assigned to the customer account and forms the basis of the quote pricing structure. This cannot be changed.
    - Discounting can be applied via the user by selecting the correct SPA in the header section applicable to the quote by firstly selecting Order and Contract Type. Then click "Save and Price" to check the pricing applied.
    - The user has the ability to apply different SPAs to different line items on the quote (see User Guide).

34. **Can we practice quote entry in the new system?** • We are live from Monday 15th May – but the system will allow you to play with a quote and effectively practice as part of the quote entry. Until you press "Submit" – the accuracy of the quote information is in your hands!

35. **If my quote has no purchase order reference but is a credit card sale is the process still to list the credit card provider e.g., VISA and the last four digits of the card number in the PO Reference field?**
    - That is correct, the process has not changed.

36. **Can we sort our quotes to be able to easily find what we need?** • Yes, In the quote listing on the home page, click on the individual column heading of the field you wish to use to reorder how your quotes are displayed on screen.

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