Fellowes®

Sales Portal

User Guide

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Fellowes Brands™

User Account Information

On Thursday, May 11th (pm)

You will receive an email containing user account login information from:

noreply@SalesPortal.Fellowes.com

The link to the Fellowes Sales Portal login:

https://salesportal.fellowes.com

PLEASE NOTE!:

System access will be available on Monday, May 15th (am)

--------- Forwarded message ---------
From: <noreply@salesportal.fellowes.com>
Date: Fri, 5 May 2023 at 14:04
Subject: Fellowes Sales Portal User Information.
To: <Username@Test.com>

Dear Firstname,
Please find your login details to access Fellowes Sales Portal.
After you login using this password, go to my profile page and change your password.

----
login name: username@TRAINING
login password: XXXXXXXXXXXX

Thank you,
Administrator

This email was generated from the SalesPortal.Fellowes.com website

Login Screen

The link to the Fellowes Sales Portal login:

https://salesportal.fellowes.com
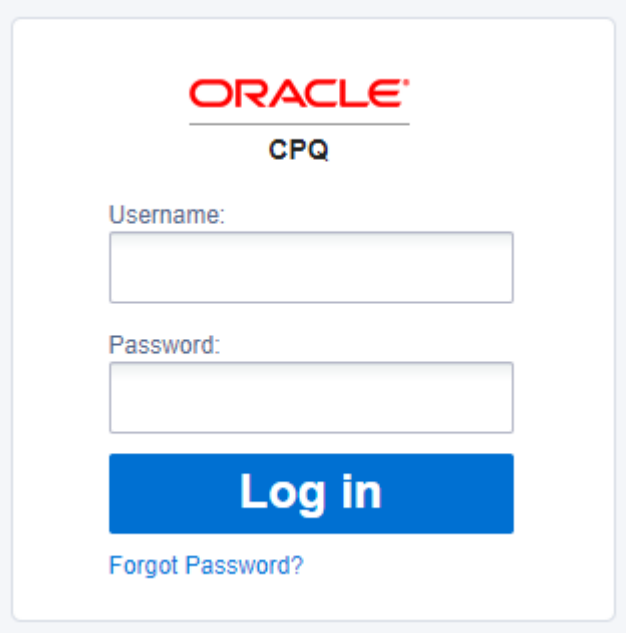
Username is entered in the format
 flastname@COMPANY

e.g. jsmith@TRAINING

Home Page Menu Bar

Menu options :

Home

User menu

gponte@Training Dealer

Sign Out

My Profile
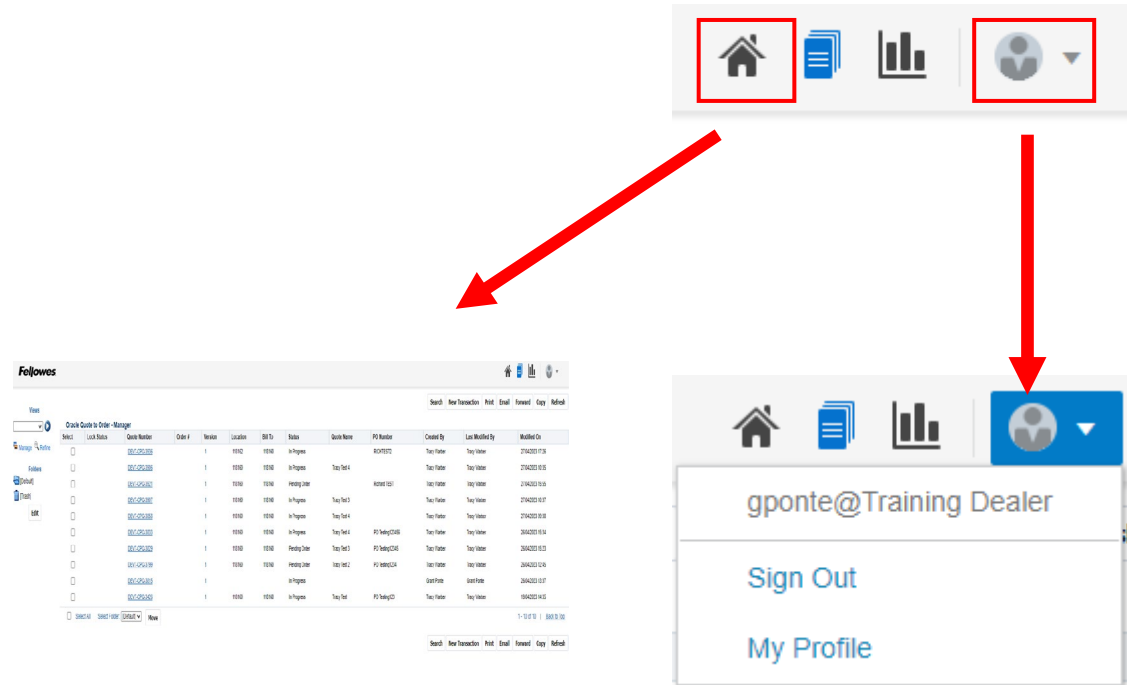
Home Page Function Buttons

Oracle Quote to Order - Manager

Select	Lock Status	Quote Number	Order #	Version	Location	Bill To	Status	Quote Name	PO Number	Created By	Last Modified By	Modified On
☐		DEV7-CPQ-3833		1	118160	118160	In Progress	Tracy Test 4	PO Testing123456	Tracy Warber	Tracy Warber	26/04/2023 15:34
☐		DEV7-CPQ-3829		1	118160	118160	Pending Order	Tracy Test 3	PO Testing12345	Tracy Warber	Tracy Warber	26/04/2023 15:23
☐		DEV7-CPQ-3799		1	118160	118160	Pending Order			Tracy Warber	Tracy Warber	26/04/2023 12:45
☐		DEV7-CPQ-3815		1			In Progress			Grant Ponte	Grant Ponte	26/04/2023 13:37
☐		DEV7-CPQ-3426		1	118160	118160	In Progress			Tracy Warber	Tracy Warber	19/04/2023 14:35

Search | New Transaction | Print | Email | Forward | Copy | Refresh

☐ Select All   Select Folder: [Default] ▾   Move

1 - 5 of 5 | Back to Top

Search | New Transaction | Print | Email | Forward | Copy | Refresh

Search for any quote or order using a wealth of header and line lookup criteria

Create a New Quotation

Copy Quote to create New

Fellowes Brands.

Search

What do you want to search using?

How do you want it displayed back to you?

What criteria are you searching for?

See the results :

View Quote/Order or

Copy to New

Copy

Choose the Quote(s) to Copy

Copy

Change, Save &
Price the new Quote

How to Create a New Transaction (Quotation)

Bill & Ship Direct to Customer

Click the toggle to Bill to Direct customer

Choose from list or click toggle to New Bill To Direct Customer

Billing to Direct Customer

Customer to Bill To

⚠ Please select Customer to Bill To

Training Endcustomer

New Bill To Direct Customer
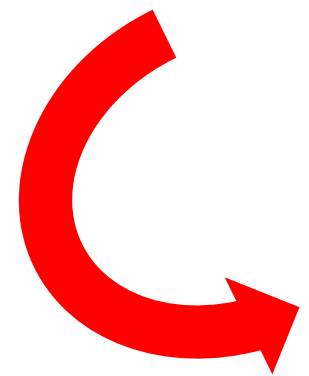
Bill To

* Bill To New Bill To

Company Name

* Address 1

Address 2   Enter New Bill-To details

* City

* State/Province

* Zip
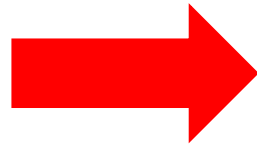
* Country US

Ship To

Ship To New Ship To

Company Name

* Address 1

Address 2   Enter New Ship-To details

* City

* State/Province

* Zip

* Country US

Search | **New Transaction** | Print | Email | Forward | Copy | Refresh

Shipping Carrier

Move to this tab

Choose from list

If Customer Collect/Third Party – fill in details

Transaction

Address Information   **Shipping and Contact Information**   Quote Information   Comm

* Shipping Carrier

Is this order shipping to a residential address ?

Best Carrier Available

Customer Pickup

Customer Collect/Third Party

Order Contact

Name of the Carrier

Freight Account #

Freight Service Level

Is this order shipping to a residential address ?

Toggle On – will incur an additional fee at Line Item level.

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Order Contacts

Enter new or select from the list the contact to receive all notifications and order confirmations.

Enter new or select from the list the contact to be contacted regarding shipping arrangements

Order Contact

* Order Contact	New Contact ▼
* Name	Joe Bloggs
* Email	jbloggs@training.com
* Phone	12345
Mobile	
Fax	

Shipping Contact

* Shipping Contact	New Contact ▼
* Name	Jane Doe
* Email	jdoe@training.com
* Phone	98765
Mobile	
Fax	

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Quote Information

Move to this tab

Transaction

Address Information | Shipping and Contact Information | **Quote Information** | Comments & Attachments | Cust

Quote Number — DEV7-CPQ-3921

Quote number is auto-generated and becomes the Fellowes Order number

Version — 1

Quote Name

* PO Number

Enter your own reference / purchase order number

* Requested Ship Date

This is the preferred date your shipment will leave Fellowes – not arrival date of shipping address!

NOTE: The earliest Request Ship Date must be greater than the longest production lead-time of any product on your Quote/Order!

See our Partner Portal for Product Production Lead Times!

Agency Code

Split Spiff

* SPIFF Dealership Name, None or Salesperson "Full Legal Name"

Apply a single or split SPIFF to the order if applicable or choose NONE

* 1st Salesperson "Full Legal Name"

2nd Salesperson "Full Legal Name"

3rd Salesperson "Full Legal Name"

Order #

Currency — USD

Types: Program/Order/Contract/SPA

Order > Contract > SPA Must be entered in sequential order

* Order Type

Commercial
Federal
Healthcare
SLED

Program Type

Standard

Less is More

Standard

* Contract Type

SPA

* Special Pricing Agreement

16469-19-CAR DEALER
16469-20-CAR DEALER - CN
Other - Enter SPA in Comments
Other - Please enter SPA in invoice comments
Spls

Enter here if your agreed SPA is not visible in drop down list.

Have you chosen the right Order & Contract Type?

Comments & Attachments

Invoice Comments

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Import TXT (renamed from SIF) Steps 1-3

Transaction

Address Information   Shipping and Contact Information   Quote Information   **Comments & Attachments**   Customer Documents

Move to this tab

Import SIF [Choose File] No file chosen

Please change the extension of the file from .sif to .txt prior to importing it into CPQ.
Please note: Large SIF imports may take some time to load, causing a "time-out" error notification to be displayed, but the SIF import will continue to run. Check back later to confirm all SIF lines have been imported.

Import CSV [Choose File] No file chosen

[Upload CSV]

...ology Solutions › CPQ › SIF Files for Testing				
Name	Status	Date modified	Type	Size
1 line (2).sif	⊘	31/01/2023 14:51	SIF File	2 KB
1 line INR.sif	⊘	31/01/2023 14:51	SIF File	2 KB
2 lines.sif	⊘	31/01/2023 14:51	SIF File	2 KB
5 lines.sif	⊘	31/01/2023 14:51	SIF File	5 KB
7 lines.sif	⊘	31/01/2023 14:51	SIF File	16 KB
9 lines.sif	⊘	31/01/2023 14:51	SIF File	9 KB
10 lines.sif	⊘	31/01/2023 14:51	SIF File	12 KB
11 lines (2).sif	⊘	31/01/2023 14:51	SIF File	12 KB
11 lines.sif	⊘	31/01/2023 14:51	SIF File	12 KB
12 lines.sif	⊘	31/01/2023 14:51	SIF File	14 KB
12 lines.txt	↻	31/01/2023 14:51	Text Document	14 KB
14 lines.sif	⊘	31/01/2023 14:51	SIF File	12 KB
22 lines.sif	⊘	31/01/2023 14:51	SIF File	17 KB
61 lines LIM.sif	⊘	31/01/2023 14:51	SIF File	64 KB
149 lines.sif	⊘	31/01/2023 14:51	SIF File	151 KB

SIF has been renamed to TXT

📄 12 lines.sif

📄 12 lines.txt

Transaction

Address Information   Shipping and Contact Information   Quote

Import SIF 12 lines.txt   [Remove]

...ase change the extension of the file from ...txt prior to importing it into CPQ.
...se note: Large SIF imports may take some ...me to load, causing a "time-out" error notification to be displayed, but the SIF import will continue to run. Check back later to confirm all SIF lines have been imported.

Shows the selected file as being ready to import

Import TXT (renamed from SIF) Steps 4-6

Click "Import SIF"

Import SIF | Save | Version Quote

Fellowes

Transaction

Address Inform

SIF Import is working . . .

Line Item Details

Group Tag

View ▾ | Freeze | Add Line | Delete Line | Export To Excel

Line #	Model Name	Tag	Item #	Item Description	Quantity	UOM
1.0	Support Parent					
1.1			RAKH	RETURN ATTACHM	1	EA
2.0	PanelStorage Pare					
2.1			CU72	CABINET UNIT 72	1	EA
3.0	Desking Parent					
3.1			SD2472	STANDARD DESK	1	EA
4.0	Desking Parent					
4.1			SR24			
5.0	Desking Parent					
5.1			SR2448	STANDARD RETUI	1	EA
6.0	MountedItem Par					
6.1			HPPT	PENCIL TRAY	1	EA

Line items will appear when TXT file has finished loading

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Add Lines

Click "Add Line"

NOTE: Will only be enabled when all Header level mandatory fields have been entered

Line Item Details

Group Tag

| View ▾ | | | | | | | Freeze | Add Line | Delete Line | Export To Excel |

| | Line # | Model Name | Tag | Item # | Item Description | Quantity | U |

◢ Product Search

Is This Special Item ☐

Product Search   SICEGHSRT ▾

Search for Item by Product (Catalog Number)

10SETUPFEE

AKM2

ALBUFFCOMPOUND

AM21INCARBONFILTR

AM2DWRECMT

AM2HEPAFILTER

Product Search   SICEGHSRT ▾   CHOICES ENHANCED GLIDE HSG INSERT

Configure Item

Click "Configure Item"

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Add Line Item Configuration

◢ Item

Item	CECWS304296R
Program Type	Standard ▾

◢ Basic Item Information

Type of Item	Extended Corner Work Surface
Choose Side	(RH) Right Hand
(RH) Right Hand Width	96
Other Width	42
Depth	30

◢ Select Additional Options

Grommet Option ▾

⊗ Please Select Grommet Option

◢ Select Laminate Color

Show Surface Library ⬤

Lookup Laminate Color by Color Code ▾

Laminate Type   Standard ▾

Grade ▾

⊗ Please Select Grade

Manufacturer ▾

⊗ Please Pattern/Manufacturer

Laminate Color ▾

⊗ Please Select Laminate Color

Edge Color ▾

⊗ Please Select Edge Color

Select configuration options for the catalog item selected

Add to Transaction

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Quick Add

Line Item Details

| View ▼ | 🔽 | 📄 | ⚡ | ⚙ |

Line # | Model Name

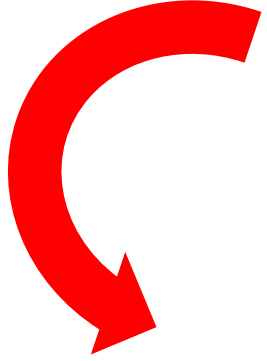**Quick Add**

Quick Add

Pricebook   Base Price

➕   Clear All

Item #

❗ Part Number is not valid

D| 🔍

Design

OK   Cancel

Option to add sundry line items for :

Design
Project Management
Installation
Reconfiguration
Miscellaneous

| Design | Design | 1 | $150.00 |

Enter the agreed Unit Price
on the line item

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Line Item Reconfiguration

Line #	
1.0	Parent
1.1	Child
2.0	Parent
2.1	Child

To reconfigure a line item, you must select the PARENT

☐	3.0	Desking Parent			
☐	3.1		4508/216	SD2472	STANDARD DESK 2
☐	4.0	Desking Parent			
☐	4.1		4508/216	SR2448	STANDARD RETUI 1
☑	5.0	Desking Parent			
☐	5.1		4508/216	SR2448	STANDARD RETUI 1
☐	6.0	MountedItem Pan			

Line Item Details

Group

View ▼ | | | ⚙ | ✏

☐	Line #	Model Name	Ta

Then Click the Reconfiguration Button

▲ Item
Item	SR2448
Program Type	Standard

▲ Basic Desk Information
Type of Desk	Standard Return
Width	48
Depth	24

▲ Select Desk Options
...port Option	(P) End Panel
...Option	(F) Full
Gro...et Option	(GY) Grommet(s)
Grommet Color	(K) CHARCOAL

Update | Save

Update to validate changes and confirm new price.

Save to return to Line Items page

Tagging

Line Item Details

Group Tag [   ]

Update All Tags   Update Selected Tags   Update Empty Tags

Group Tag is the Tag label to attach to single or multiple selected Line Items

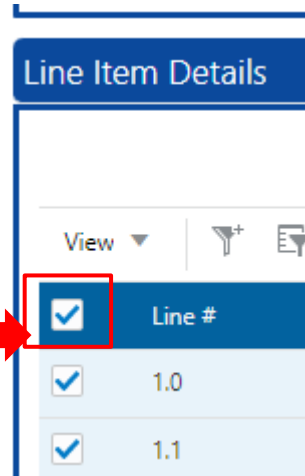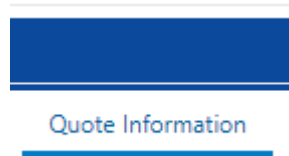Choose a mass update option for tagging using your entered Group Tag

	Line #	Model Name	Tag	
☐	1.0	Support Parent		
☐	1.1		FIRST FLOOR	
☐	2.0	PanelStorage Pare		
☐	2.1		FIRST FLOOR	
☑	3.0	Desking Parent		
☐	3.1		THIRD FLOOR	
☑	4.0	Desking Parent		
☐	4.1		THIRD FLOOR	
☐	5.0	Desking Parent		
☑	5.1		THIRD FLOOR	
☐	6.0	MountedItem Par		
☑	6.1		THIRD FLOOR	
☐	7.0	MountedItem Par		
☐	7.1		FIRST FLOOR	
☐	8.0	MountedItem Par		
☐	8.1		4508/216	

Select lines at either Parent or Child for tagging

Press Update Selected Tags

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Applying the SPA to All Line Items

Go to the Quote Information tab

Quote Information

Line Item Details

View ▼

☑ Line #
☑ 1.0
☑ 1.1

Check the box to select All line items

* Order Type	Healthcare ▼
* Contract Type	Premier ▼
* Special Pricing Agreement	29242-0-PREMIER GPO ▼
	Apply SPA's
Contract	PP-FA-874

Click "Apply SPA's"

SPA	List Price	New List	Discount
29242-0-PREMIER	$55.00	$110.00	0.00
29242-0-PREMIER	$2,071.00	$4,142.00	0.00
			0.00

🏠 📄 📊 👤 ▼

Import SIF | Save & Price | Submit Order | Cancel Quote | Version Quote
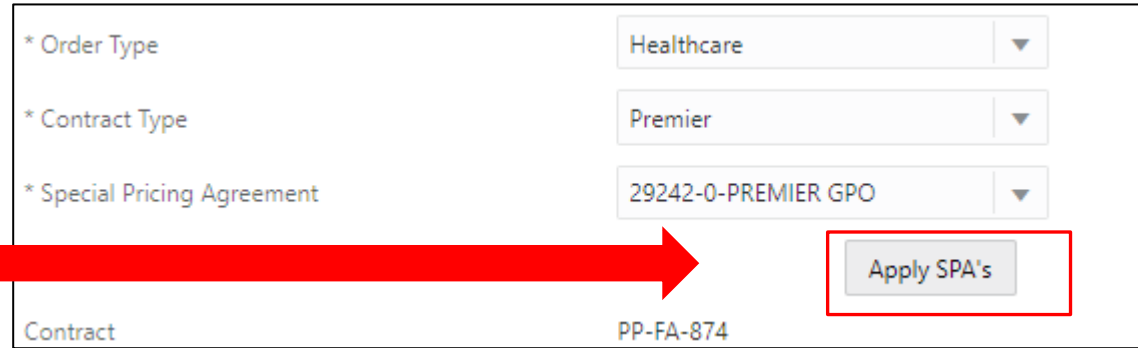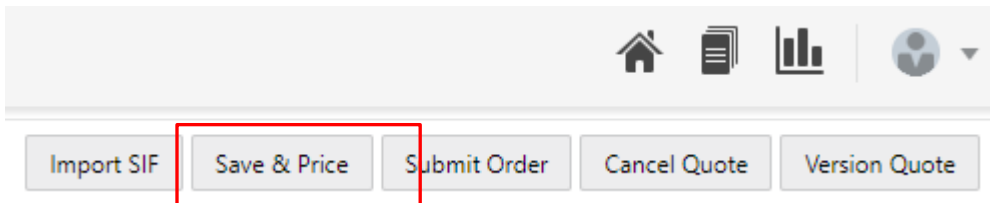
Click "Save & Price" and the line item discounts will appear against all applicable line items where SPA has been agreed and set-up.

The SPA name is now visible against all applicable lines, however the Discount has not calculated

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Copy Line Items

Line #		
1.0	Parent	
1.1	Child	
2.0	Parent	
2.1	Child	

To copy a line item, you must select the PARENT

You can copy multiple line items at once

	Line #	Model Name	Tag	Item #
☑	1.0	Support Parent		
☐	1.1		FIRST FLOOR	RAKH
☑	2.0	PanelStorage Pare		
☐	2.1		FIRST FLOOR	CU72
☐	3.0	Desking Parent		

New line items are created

	Line #	Model Name	Tag	Item #
		Support Parent		
☐	1.1		FIRST FLOOR	RAKH
☐	2.0	Support Parent		
☐	2.1		FIRST FLOOR	RAKH
☐	3.0	Support Parent		
☐	3.1		FIRST FLOOR	RAKH
☐	4.0	PanelStorage Pare		
☐	4.1		FIRST FLOOR	CU72
☐	5.0	PanelStorage Pare		
☐	5.1		FIRST FLOOR	CU72
☐	6.0	PanelStorage Pare		
☐	6.1		FIRST FLOOR	CU72

Copy Line Items

Number Of Copies

Number Of Copies

Select the number of copies per line selected

Click OK

1

1

OK

Fellowes Brands.
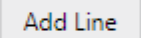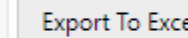
Freeze Line Item Columns

Line Item Details

Group Tag | THIRD FLOOR

View ▼ | ▼ ▤ ⚡ ⚙ ✎ ▤ 🗑 | **▥ Freeze** | Add Line | Delete Line | Export To Exce

	Line #	Model Name	Tag	Item #	Description Override	Item Description
☐	1.0	Support Parent				
☐	1.1		FIRST FLOOR	RAKH		
☐	2.0	Support Parent				
☐	2.1		FIRST FLOOR	RAKH		
☐	3.0	Support Parent				
☐	3.1		FIRST FLOOR	RAKH		
☐	4.0	PanelStorage Pare				
☐	4.1		FIRST FLOOR	CU72		CABINET UNIT 72
☐	5.0	PanelStorage Pare				
☐	5.1		FIRST FLOOR	CU72		CABINET UNIT 72

Select a Line Item Column Heading to highlight in pale blue

Click the "Freeze" button to hold the column in position and allow left to right scrolling to the immediate right of the frozen column

OK

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Quote/Order Summary

Summary

Total List Not Including Surcharge or Services	$15,106.00		Total Fuel Surcharge	$0.00
Total List Including Surcharge or Services	$15,326.00		Total Order Surcharge	$0.00
Total Net Not Including Surcharge or Services	$6,193.46		Total Steel Surcharge	$0.00
Total Net Including Surcharge or Services	$6,413.46		Total Freight Surcharge	$0.00

Check the Quote Summary totals

Click "Save & Price".

Import SIF   Save & Price   Submit Order   Cancel Quote   Version Quote

When Quote has been validated – you will receive this message

Click "Submit Order" to validate the Quote Entry.

Your Order has been submitted. A confirmation will be sent to the Order Contact email address provided on your order.

OK

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