Dell Technologies Global Portal User Guide



Dell Global Portal | User Guide

D&LLTechnologies

Dell Premier Global Portal User Guide



What is Dell Premier Global Portal?

Global Portal is Dell's one-stop worldwide procurement center. It delivers a consistent purchasing experience worldwide by enabling the creation and management of global orders through a single platform.

What can you do with Global Portal?

Using your Dell global portal, you can

- Access a single, consistent global catalog, servicing all countries worldwide
- Access the complete Dell catalog of products available in select countries
- Shop, quote and buy global standards for hardware, software and accessories
- Prepare and save system configurations for purchase at a later date
- Quickly and easily customize user access
- Purchase peripheral items for your existing hardware
- Track your orders through robust reporting capabilities

Getting Started

This user guide will help you get started on the path to streamline your worldwide procurement with Dell.

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1 Sign into Global Portal



1.1 First time Portal User

When you are set up as a user on Dell's global portal you will receive an automated welcome email which provides your organization's unique Premier page name, profile email address and temporary password.

Sign in to your Global Portal at

www.dell.com/account

- Enter your profile email address and temporary password provided. Click Sign In (Fig 1.1)
- Choose the account/access group from the selector (if applicable). Click Access Premier

Note: You may only have one access group and therefore you will be directed straight to your page.

1.2 Returning Portal User

Sign in to you global portal page at

www.dell.com/account

• Enter your current email address and password. Click Sign In.

If you have forgotten your password, click on Create or Reset Password (Fig 1.2)

 Choose the account/access group from the selector (if applicable). Click Access Premier.

1.3 Forgot Password

Enter your profile email address and click Reset Password (Fig 1.3). You will receive an email shortly.

Fig 1.2	
	Don't remember your password? Create or Reset password
	Sign In

Fig 1.3	
Enter the email ad We'll email you a li	dress associated with your account and click Reset Password . nk to reset your password.
Email Address *	
Reset Password	

Premier Sign In Email Address Password Don't remember your password? Create or Reset pass

Fig 1.1

Don't remember your password? Create or Reset password
Sign In

Ø

Streamline IT Procurement with Dell Premier

Contact Premier Support

1.4 Manage your Account Information

Once on the global portal page, users can easily manage the page and get access to useful information.

- On the top navigation bar click on Account (Fig 1.4)
- Overview allows you to view your Dell account team, manage user access, view reports and the list of Dell authorized partners (administrators only).
- The Orders section offers access to recent online orders and order status.
- You can customize your profile through the Account Settings section. Select Profile Information to change your personal details. Select All Addresses to access and manage your billing, shipping and mailing addresses in your address book.

Note: only the user can change their personal information or change / reset their password.

Fig 1.4

C	ABC - Global Portal+	Acces	s Group : Reporting	Role : SiteAdmin Switch to Acother Premier Account ① About Access Roles				
ଲ	Overview			Recent Orders	Order Status	Reports		
<u>9</u> 88	Dell Support Manage User Access	Ý		~	Build Your Own Report New			
10	View Dell Partners			No orders found				
٢	Orders	\sim		Go To Shop				
	Recent Online Orders							
	Invoices			Ø Address Book	Manage Addresses			
đ	Reports			Manage your Billing and Shipping Addresses				
123	Account Settings	\sim						
	Profile Information			Q Quotes	Quotes View Quotes			
	All Addresses			Purchase or manage your eQuotes and Sales Quotes.				
				B Dell Digital Locker	Open Digital Locker			
				Manage your purchased software products				





Once you've signed in, you will land on the Dell Premier global portal homepage, where you can manage all of your important tasks from a single location. Experience a quick and streamlined access to your most commonly used features.

The landing page is structured by sections that enable you to access the various page features directly:

2.1 The Country Selector

The "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized option defaults during system checkout.

2.2 Quick access strip

This horizontal strip provides quick access to your most used features. You can easily retrieve and manage your quotes, get access to your Standard Configurations (if any) and check the status of your open orders. The features available on this strip can be somewhat customized by your Premier Account Manager.

2.3 Shop Dell Products

The "Shop Dell Products" section allows you to explore the Systems catalog (if enabled for your page) for the selected ship-to country. It displays the complete line of Dell branded systems. You can also find Dell monitors, printers and projectors and shop for items in the "Accessories and Peripherals" catalog. Simply click any of the links highlighted in blue to get directed to the respective product.



2.4 Dell Support

The convenient "Support" section helps you to check shipping and delivery status for your Dell products, find answers to common questions, identify your product to get the latest available updates, warranty status and coverage options.

2.5 In the Spotlight (if enabled for your page)

The "In the Spotlight" section provides useful updates and news about products, page features and other items. In most cases, you will able to obtain more information by clicking the respective links.

Watch short and pragmatic videos about Dell Premier solutions, new features, inspiring customer stories to stay one move ahead.

2.6 Getting Started

The "Getting started" section provides access to the Global Portal Help Center where you can find detailed explanations of most Premier features.

Fig 2.2						
Sup	DELL S port Home Order Support Driv	SUPPORT rers & Downloads Wa	rranty & Contracts			
Turn sales quotes into online orders quic Image: Select state Image: Select state Global Procurement Overview Image: Select state Image: Select state <t< th=""><th>kly hase sales-created quotes through curement is your one-stop-shop with on country selection.</th><th>Estimate your savin</th><th>Ings Create a personalized assessment and business case estimating the savings that Dell Premier can provide for your organization. Access Now Of and Economic Impact Simplified purchasing and reduced costs enabled by Dell Premier Watch Now</th></t<>	kly hase sales-created quotes through curement is your one-stop-shop with on country selection.	Estimate your savin	Ings Create a personalized assessment and business case estimating the savings that Dell Premier can provide for your organization. Access Now Of and Economic Impact Simplified purchasing and reduced costs enabled by Dell Premier Watch Now			
How easy is it to find what you need? Very Difficult 1 2 3 4 5 6 7 Very Easy						
Getting Started	Shop for products Create and manage quotes Place orders via Partners		Manage your account Explore your page Videos and Guides			

3 Product Catalogs



Before you start your shopping, select the desired "ship to country" from the selector available at the top of your Dell Premier global portal page. This "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized option defaults during system checkout.

3.1 Global Standard Configurations

The grey strip provides easy access to your global Standard Configurations. Standard Configurations are Dell systems specifically customized for your organization with selectable options (upgrades/ downgrades) created by your Dell Account Team.

Standard Configurations have your organization's negotiated pricing included.

3.2 Full Systems Catalog

If your company has approved catalog ordering in addition to your standards, the Dell's Full Systems catalog will display as a separate tab within the "Shop Dell Products" section of your landing page.

- Choose the product group you wish to order, narrow your selection using the assisted navigation and Add to Cart.
- Follow the global checkout process (see 5.3).

3.3 Software and Peripherals (S&P) Catalog

Based on your selected Ship To Country, you will be able to see Software and Peripherals (where available) in the "Shop Dell Products" section of your landing page. This catalog will contain S&P items that are not part of your global standards.

- Choose the product group you wish to order, narrow your selection and Add to Cart.
- Follow the global standards checkout process.





Product / Software offerings may vary per country. Please contact your Dell Account Team for further information.



For easier product transitions, you can now see notifications when a standard configuration is about to be retired or has retired.



eQuotes give users the ability to prepare an order and save it for future purchase.

Before you start, select the desired "ship to country" from the selector available at the top of your Dell Premier global portal page. This "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized option defaults during system checkout.

4.1 Creating and saving an eQuote

- Select product from global Standard Configurations, S&P or Systems catalogs as required.
- When ready, Add to Cart (see 5.2) and click on Save as eQuote. (Fig 4.1)

Finalize the eQuote by completing all required fields (Fig 4.2)

- Specify the name of your eQuote.
- If you need to send this eQuote to your purchasing agent and/or any other recipient via email, complete the appropriate fields. The selected Authorized Buyer has the ability to approve/purchase eQuotes off the Page.
- Enter notes and description if needed (optional)
- Enter the Order Contact information
- By entering your Shipping / Billing address (optional), you enable us to calculate shipping costs and any other applicable fees, and you save time when placing your order.
- You can even select your delivery and payment methods.
- Then click Save eQuote. You will receive an e-mail confirmation with your saved eQuote information for future reference.



Fig 4.2

		Servings Subtotal (1) Extinuted Shipping Total	5996 51 \$1,664.93 \$25.99 \$1,690.96
•	What is an Authorized buyer?	Ship To Currency	United States US Dollar
		Save eC	luote
		Norton	
	•	what is an Authorized bayer?	What is an Authorized bage?



If Authorized Buyers have been set up for your organization, a selection of Authorized Buyer names will be available when saving an eQuote.

4.2 Retrieving an eQuote

You can view and retrieve your Quotes from the Quick links strip available on the Global Portal home page.

- The fastest way to find your quotes is to use the dynamic filtering search box. You can search by eQuote name, number, creator or buyer in order to locate your quotes.
- From within the eQuote list, click on the eQuote number. If you need to purchase multiple quotes, you can easily select them and click « Purchase Selected ».
- To make changes to the quantity, open the eQuote by clicking the eQuote number, adjust the quantity and click "Save new eQuote" to save your changes. The updated configuration will be saved as a new eQuote referencing a new eQuote number. The original eQuote will not be changed and remains in your list until it expires or is deleted.
- When ready to purchase, just proceed to checkout.

4.3 Requote an expired eQuote

If your eQuote has expired within the last 30 days, you can still access it. Clicking "Requote" (Fig 4.5) will move the eQuote to cart immediately and generate a new eQuote number. The new eQuote may reflect changes based on item availability and current pricing.

Fig 4.3					
DCLL Technologies	Search Dell Premier Q				
Shop \sim Solutions & Services	Support ~ Account				
Standard Configu	ations Quotes				

Fig 4.4



Fig 4.5					
Created	Authorized Buyer	Expires	Status	Country / Currency	Subtotal / Total Price
sudhakar, March 21, 2018		April 20, 2018	Not Purchased	United States [USD]	\$1,495.21 \$1,495.2 1
				View Details	Requote

4.4 Retrieve and purchase your sales created quotes 24/7

Along with being able to manage your eQuotes in your global portal, you can retrieve the quotes provided by your Dell Account Team and purchase online*.

Go to the Quotes section, look for the quotes shared by your sales representative in the "Sales Quote" tab and proceed to checkout. You will get automated order tracking notifications in your mailbox.

* May not apply to all products.

Excluding Latin America ship-to countries (new Quote experience available in Mexico only)

eQuotes are valid for 30 days, provided there are no changes to the configuration or the price of the configuration.

5 Shopping and Ordering



Before you start your shopping, select the desired "ship to country" from the selector available at the top of your Dell Premier global portal page. This "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized option defaults during system checkout.

5.1.1 Shopping and ordering a Global Standard Configuration

Open the "Standard Configurations" page.

Use the real time filtering search box to quickly find your standard configuration.

Clicking on the name of the configuration or the product image opens the configuration and makes it easy to review the exact list of included components and services.

Click on Customise & Buy link next to the product you wish to order (Fig 5.1)

Choose the options you are interested in. Keyboard layout, system software language and power cord are automatically pre-selected based on the language and regional specifications of your shipping destination.

Under 'More Actions' (Fig 5.2), you can review the summary of your configurations, email it and/or print it or save as pdf. When you are ready to purchase, just Add to Cart.

5.1.2 Shopping and ordering from your catalogs

Choose the product group you wish to order, narrow your selection using the assisted navigation and customize the selected configuration. Choose the options you are interested in. When you are ready to purchase, just Add to Cart.

Fig 5.1					
Standard Configurat ABC - Global Portal+ Filters MONTORS X Clear All	ions		Set By Defe	t v ĝ₁ Search your Sta	educts by name, product type, category and more. $\ensuremath{\mathbb{Q}}_{\ensuremath{\mathbb{Q}}}$
Categories ACCESSORES MONITORS SERVERS		Name Interactive Touch Monitor - C7500QT	Product. Del 75 4K interactive Touch Mentor: C75000T Category Monitoris	Price: pagements	Add to Cart Countrinite & Buy
		Name Conference Room 55° 4K Monitor - C5519Q	Product: C55192 Monitor Celegary Monitors	Proc.	Add to Carl Coutomite & Bay





Keyboard layout, system software language and power cord are automatically preselected based on the language and regional specifications of your shipping destination.

5.2 Add items to Cart

- Select Add to Cart (Fig 5.4)
- Change the quantity if needed
- Check that the Ship to Country and currency are correct
- For placing your order, click on the green "Checkout" button. This will take you to the secure check-out screen.(Fig 5.5)

5.3 Proceed to Checkout

- Verify Contact Information
- Complete the required billing and shipping information. The Search field allows for easy and intuitive address search. Select an already prepopulated billing address (If not available contact your local Dell Sales Representative). Choose a shipping address from your Address Book or add a new shipping address if needed.
- Select your delivery method
- Select your payment method using the drop down menu.
- Complete the Trade Compliance questions (mandatory)
- Attach supporting documentation (optional)
- Within the "Review" screen (Fig 5.5), check the order information and make any necessary changes by clicking on the Change link.
- Click the green "Order and Confirm Payment" button to send the order to Dell.

Note: You will receive an automated Dell acknowledgement.

Fig 5.4



Fig 5.5				
Checkout				
	✓			
Shipping a	ind Payment	Review	Order Com	plete
Review and cor Terms of sale	nfirm your order		Savings Subtotal (1)	
When you place your order, plo product. If anything changes i Unless you have a separate ag	ease be mindful that we will need people on site at n your ability to receive the order prior to its deliver greement between you and Dell that specifically app	your shipping destination to receive the y, please contact Customer Care. plies to this order, by clicking "Order and	Estimated Shipping Estimated Tax Total	
Confirm Payment", you agree	to Dell's TERMS OF SALE			
			Ship To Currency	United States US Dollar
Order contact	John Someone, ABC Phone number (786) (512) 222-22222 John_someone@abc.com	Change	Order and Confi	rm Payment
Billing information	John Someone, ABC, ABC 1 Dell Way, Round Rock, TX, 78682, US Phone number (512) 222-2222 John_someone⊛abc.com	Change		
Tax exemption	I am not tax exempt	Change		
Shipping information	John Someone, ABC, Purchasing 1 Dell Way, Round Rock, TX , 78682, US Phone number (512) 222-2222	Change		
Delivery Method	lowest cost delivery	Change		
Payment method	Purchase Order PO: 123456789	Change		
Trade Compliance	I will not be exporting	Change		
Upload files	No files uploaded.	Change		
Items Change				
Items	Quantity	Unit Price Item total		
Dell USB 3-Button Op Dell O	otical Mouse ptical Mouse - MS116	1		
(Black Discour Manufa Dell Par	:) ited unit price: \$15.39 cturer Part≢ : 15VVH t# : 275-BBCB			
Estimat	ed Ship Date			

Save time! The "Recent Online Orders" link leads you directly to all of your orders placed online in the last 30 days. Click "Add to Cart' to proceed to checkout where your contact details as well as billing and shipping information are already pre-populated.



The Address Book gives you the ability to manage your global addresses without the need to engage Dell.

6.1 Accessing your Address Book

6 Address Book

- Go to Account located on top of your Global Portal Page.
- Select Account Settings and then All Addresses link.

6.2 Creating a new Shipping Address

If there are no previously saved addresses or if you need to ship to a different address than what is displayed, you can click Add New Address.

- Select the checkbox to indicate the type of address (shipping) (Fig 6.2)
- Complete the required fields and save.

6.3 Managing your Addresses

The Address Book (Fig 6.3) allows you to access the list of saved addresses, the priority applied to each address, if it's a shipping or billing address and the date when it was last modified.

Applying a priority gives you the ability to set a single address as a default. This default address prepopulates during checkout. At any time you can change the priority of an address which will only take effect in your user profile.

Use the available dynamic search box to find an address or easily sort the columns in ascending or descending order.



Fig 6.2			
All Addresses			
Manage Billing, Shippin	g and Mailing add	dresses in your compa	ny's address book. Frequently Asked Questions
Add New Address	ယ် Downloa	ad All (.xlsx)	
Filter and Sort			
Search Address Book			
Q			
Find addresses that match a co	ntact name, company, o	customer ID, email address, c	ity, street address or postal code.
Delete Selected	Expand All	Collapse All	
Contact Nan	ne, Company		Address Type
John Someo ABC	ne 🗸		Billing Default
Jane Someon XYZ	ne 🗸		Shipping Default

Fig 6.3					
	Contact Name, Company	Address Type			
	John Someone AABC	(Billing Default			
	Company Information Organization or Department: ABC Customer ID: Not Available	Address 1 Dell Way, Round Rock, TX Zip Code: 78682	Contact Information Phone: 512222222 Email: <u>John_someone@abc.com</u>		
		Country US			

Billing addresses are locked. Please contact your Dell Account Team if you need to add/edit/delete a billing address.

7 Dell Partner Country Ordering



If the country you have selected is not a Dell Direct country you will be prompted to select a Dell Authorized Partner. If a specific Partner is not available please contact your Site Administrator or contact <u>PremierHelpdesk@dell.com</u> for assistance.

7.1 Selecting a product and sending to Dell Authorized Partner

- Select your "ship to country" from the country selector at the top of the page
- Select the Dell Authorized Partner from the dropdown box. (Fig 7.1)
- Select and customize the configuration you are interested in. Keyboard layout, software language and power cord are automatically pre-selected based on the language and regional specifications of your shipping destination. These automatic selections can be changed in the configurator.
- Select Add to Cart
- Change the quantity (if needed) and click on Create Quote. (Fig 7.2)
- Complete the required information and click Send to Partner. (Fig 7.3)

An email will be sent to the Dell Authorized Partner to advise that a request has been submitted. This request will remain visible until it expires.

Pricing provided for Dell Partner countries is indicative only. The final pricing will be provided by the partner in the form of a quote.







Turkey US Dollar

Send to Partner

Save time. Manage your list of favorite Dell Authorized Partners through the "Account" tab at the top of the page. (More info page 5)

7.2 Request for Quote (RFQ)

You will receive an email providing your Request Number. Additionally, your request will be available in the Quotes page.

When the request is initially submitted the status will display at Pending Partner Pricing. (Fig 7.4).

When the Partner has completed the Quote, the Partner will upload the Quote to the page and change the status to Price Updated. This will prompt an email to you to advise you that the Partner has completed the action.

Access the Quotes page (under My Tools) and check that the status has changed to Price Updated.

7.3 Request for Order (RFO)

Click the quote number to view further information. If you are satisfied with the final quote attached by the partner, upload your Purchase Order / agreement confirmation for the Partner to action and Request Order. (Fig 7.5)

An email notification will be sent to the Partner to finalize the order with Dell.

The status of the request will be automatically updated when the Authorized Partner places the order. You will be informed that the quote has now been purchased. (Fig 7.6)

Fig 7.4							
Quotes						🏦 Mal	ke this my home page
Choose the eQuote search field. You ca ship to different con	Choose the «Quotes you would like to purchase from the list below or search for an «Quote by entering the name, creator, boyer, «Quote number or Sales Quote number in the search field. You can select and purchase up to four «Quotes that have the same ship-to contrib and currency. You can return to this page to purchase additional eQuotes that why to offferent nounties.						number in the al eQuotes that
Purchase Selected	Search by sales quote of	r eQuote name, numbe	r, creator, buyer	٩			
Name	Number	Created	Authorized Buyer/ Commercial Partner	Expires	Status	Country / Currency	Subtotal / Total Price
test	1025675019:	salma_ June 26, 2018	Global Portal Tes	July 26, 2018	Pending Partner	Hungary [EUR]	Indicative Price 522,55 € View Details
test:	1027143903i	salma_i June 26, 2018	Global Portal Tes	July 26, 2018	Pending Partner	Russia [USD]	Indicative Price \$638.40 View Details

Fig 7.5			
in > Quotes > Qu	iote 1002708234344		
RFQ_16_I	May.		
Quote number: 1002	708234344		
		Savings	\$422.70
Status:	Price Updated	Indicative Price (1)	\$1,232.18
Partner Quote	Currency and Number format in Portal - Copy.docx Currency and Number format in Portal.docx	The Indicative Price is a baselin	e estimate. This number
Purchase Order:	Please attach purchase order	between you and the partner.	o onine negotasions
If you are satisfie	d with the updated pricing, please continue by attaching your Purchase Order.		
Attack DO		Created	May 16, 2018
Attachieo		Expires	June 30, 2018
		Created by	vivek@dell.com
	Cancel Quote Request Order		
		Status	Price Updated
Items	Quantity Unit Drice Item total	Autnonized partner	
iterina.	coantry one neer total	Ship To:	Vietnam
		Currency:	US Dollar

Quotes						🏦 Mai	ke this my
Choose the eQuotes you would like to purchase from the list below or search for an eQuote by entering the name, creator, buyer, eQuo search field. You can select and purchase up to four eQuotes that have the same ship-to country and currency. You can return to this p ship to different countries.				creator, buyer, eQuote r u can return to this pag	number or Sales Quote r e to purchase additiona	number in I eQuotes	
Purchase Selected	Search by sales quote or o	eQuote name, numbei	r, creator, buyer	Q,			
Name	Number	Created	Authorized Buyer/ Commercial Partner	Expires	Status	Country / Currency	I s To
test	1028258387083	salma_1 June 26, 2018	Global Portal Tes	July 26, 2018	Pending Partner	Egypt [USD]	Indicat View
Hungary	1025546524402	michael_ June 22, 2018	## laki	July 22, 2018	Purchased	Hungary [EUR]	Indicat

Fig 7.6



Reports are made available for a select list of users. Please contact your Site Administrator if access is required.

8.1 Global Order Status

Global Order Status enables you to monitor the most recent direct country orders placed globally, as well as display all orders placed on Global Portal, local Premier pages, telephone or via email through a Dell Sales Representative.

Searching and finding your orders

You can access Order Status by clicking on the Order Status link in the grey strip underneath the Global portal navigation (Fig 8.1)

You should have access to all of your global orders within the last two (2) years that have a status of Received, Confirmed, In Production, Shipped, Delivered or Cancelled. (Fig 8.2)

The Recent Order application allows you to filter and search by:

- Order number/PO number
- Customer Number
- Status of the Order
- Location
- Timeframe (Last 7, 14, 45, 90 days, 6 months, past 1 year and last 2 years). From Date to Date gives you the ability to select your start and end dates and get a custom report.

Expanded View (Fig 8.2) provides you with an easy way to view additional order status information at a glance such as Service tags, number of items/boxes, packing slips...

Note: Using "Customize Columns" (Fig 8.3), you can customize your view by selecting seven fields (reordering them if necessary) from a list of 30+ options and save it to your profile.

Fig 8.1				
D &LLTechnologies	Search Dell Premier		Q	
Shop ~ Solutions & Services	Support Y Account			
		Û		ß
Standard Configu	rations	Quotes		Order Status

Fig 8.2



Fig 8.3				
Customize Columns			×	2020-10-08
Available Fields		Selected Fields		Update Results
Search for a field		7 of 7 selected		
 Order Related Numbers (7) Order Date Order Number PO Number DPID/IRN VPN Number EAN Code Quote Number 	* + + + + + +	Corder Date Corder Number PO Number PO Number Product Description	×	rt = Customize Columns ACTIVITY
Documents (4) Order Content (3)	v		×	
		Cance	Update	Dec 28, 2020 1: Ground

Viewing order details and real time order tracking

- Click on any order number link to view the details of the order (Fig 8.4) including but not limited to order details, package tracking information and actions (View packing slip, report an incorrect item...).
- When your order has shipped, click on the tracking number to take you to the courier's webpage so you can keep on tracking your order.

Export

All the fields can be exported into an Excel report by clicking the "Export" button (Fig 8.5). The first 2,000 records will be downloaded instantly; for anything beyond that amount of records, the report will be available in a new link "View Downloads".

8.2 Purchase History and Warranty Reports

Purchase History offers trending data for a rolling 15 month period to provide insight into what has been purchased and spend by location globally. Service Contract (Warranty) Report provides a forward look for asset planning and a historic look to identify expired warranty assets.

- Go to your Account page and select Reports.
- Choose the required report
- For the Prestige reports, complete the required fields (Account, Product, Region, Country and currency)
- Click View Report (top right) to access the report in graphical format (Fig 8.6)
- Select Summary View to access the report in detail and filter or export to Excel.

Fig 8.4

	Ord order date: Oct	er number 333 5, 2020 Customer number: FR5	Delivered	
Received By Dell Oct 5, 2020	Confirmed Oct 5, 2020	In Production Oct 5, 2020	Shipped Shipped Oct 5, 2020	Delivered Delivered: Oct 7, 2020
Order details (1 items)	Packages (1)	ПЕМ	I NUMBER QUANTITY	Actions
> Latitude 5410 BTX Bar	be	2104	WCH 1	View invoice
ADDRESS DETAILS				Ocancel order
Billing Address	Shipping Address	End User		2 Return order
				G Contact customer support

Fig 8.5

ABC - Global Portal	+ Change ac	count/access group			
Order Number	PO Number	DPID/IRN	Customer Number	Order Status	
Search	Search	Search	All 🗸	All 🗸 🗸	
Accepts up to 100 values. Accepts up to 100 values.					
Activity	Location	Time Frame	From Date	To Date	
All 🗸 🗸	View All	Past 45 days 🗸 🗸	2020-08-24	2020-10-08	
Clear Update Results Showing 1-25 Of 113 orders placed in the last 45 days (a) Verse Downloads()) (b) 2 Open 1 of Destoree Octamos					
Showing 1-25 Of 113 orders place	d in the last 45 days		占, View Downloads(0)	Z Export	



Fig 8.6



i

The reports display all orders placed via Global Portal, local Premier pages, or via telephone or email through a Dell Sales Representative.

8.3 Build Your Own Report

Build your favorite report from all available "order", "customer", and "tracking and delivery" details.

- Go to your Account page and select Reports.
- Choose "Build a New Report"
- Complete the required fields and enter your preferences to build your own report (Fig 8.7)
- Review and download your report.

You can edit and save your report under 'Saved Reports', download it as a .csv file, or schedule it to be delivered via email.

8.4 Invoice Report*

The Premier Invoicing report has been developed as an exclusive service for our customers to return invoices for any customer number enabled for reporting. There is no limit on the number of invoices recorded.

- Go to your Account page and select Reports.
- Under 'Standard Reports', Choose "Premier Invoicing Report"
- Easily view, print or download your invoice data for a selected time period.
- * might not be available in all countries

Fig 8.7

Build Your Own Report

Build your report the way you want it by entering your preferences below.

Step 1 o	Step 1 of 3 (Fill all fields to proceed)					
General Information						
	Report Type					
	Orders and Invoices 🗸					
	Report Name (required)					
	Give your report a name, for example 'January 2021 orders'					
	Time Period					

F	Fig 8.8						
		INVOICE DATE	INVOICE NUMBER	ORDER NUMBER	STATUS	INVOICE DUE	
		Mar 11, 2024	10736146	842696	🕑 Paid	\$0.00	
		Mar 11, 2024	10736218	842735	Unpaid	\$3,420.30	
		Mar 11, 2024	60138368	<u>842912-</u>	Paid	\$0.00	



If you are unable to find the a report on your global portal, contact your Dell Sales Account Team to have this report enabled.





Upon going live with your Dell Premier global portal, Dell will ask you to designate at least one User Administrator per access group to manage user access to your Global Portal page and handle user needs for your company.

Managing Roles and Access Groups

Through Dell Premier global portal, you can allocate access groups and roles. This enables you to manage what a user can see and do in your portal depending on their roles and responsibilities. Users may be members of multiple access groups with different or same roles.

Only a designated User Administrator can assign users to roles within the groups.

9.1 Managing Users

To manage the users of your Global Portal page, invite new users, manage roles, and search for users:

- Go to Account located on top of your page (Fig 9.1)
- If you have an Administrator user role, you will see the "User management" section.

From this screen you have the ability to add a new user, copy existing users, upload users, download your own user list and remove users.

- At any time, you can narrow your search by applying filters.
- For a new user to access the Premier Page, enter the new user's email and click "Add User"
- Select an access group and a role applicable to this new user (Fig 9.2)
- Click "Save"

Fig 9.2

Add User Details	
(i) Changes made on this page will apply to future orders, not ord	ers in progress
User Information Enter the following user information and select individua login to make the changes on their profile under "Accour	al preferences, if needed. If a user's first name a nt Settings/Profile Information.
First Name	Last Name
Authorized Buyer View More ∨ Order Notifications View More ∨	



9.2 Selecting Roles and Access Groups

For most organizations, users will have general access and reporting/management access groups. In most cases, Dell turns off reports in the "General Access" category and makes these reports available only to the members of the "Management" access group. It is, however, the customer's choice as to what is made available to each access group.

You can assign different roles and decide what your colleagues will do in Global Portal. User roles fall into the following three main categories: Shoppers, Buyers, and Administrator.

- Shoppers cannot place orders but are allowed to shop, save eQuotes and view their own eQuotes.
- Site eQuote Shoppers have the same abilities as shoppers, but can view all users' eQuotes saved on the page.
- Shopper-no-price users have the same abilities as shoppers, but do not have access to view pricing.
- Buyers can place orders, save eQuotes, and view and purchase their own eQuotes.
- eQuote buyers can do everything buyers can do plus view and purchase eQuotes from other users who belong to the same access group.
- Site eQuote buyers can do everything buyers can do, plus view and purchase eQuotes from all users from all access groups saved on the page.
- User Administrators can place orders like eQuote buyers, but they can also invite, revoke or edit users within their same access group.



Only a designated Administrator can assign roles to users within the Access Groups.

10 Global Account Team



Dell Account Team

Email your Dell representative directly from your Global Portal page.

• Go to Account, select Contacts (Fig 10.1)

This section provides contact information for your global Dell team. "General Contacts" are your main points of contact and include the Headquartered Dell Account Team, Customer Success Program Manager and Premier Account Manager. Utilize the drop down filter to find your local Dell Representatives.



Need help? Email: <u>PremierHelpdesk@dell.com</u>

Useful 11 _{Resources}



Dell Premier Video Library

Video training is available for all users. Visit our Dell Premier Video library, watch our short videos and learn more about our global platform in a pragmatic way.

