

IDEC B2P Partner Portal User Guide

rev 5. 1-30-2023



Admin Account Setup

My Account

- Order History
- Returns History
- Invoices
- Saved Carts
- Address Book
- Payment Details
- Personal Details
- Email Address
- Password
- Close Account
- Sign Out

My Company

Dashboard

Announcements

Orders

- Create / Import Orders
- Open Orders
- Order History
- Saved Carts
- Returns
- Stock Rotation

Pricing

- Price & Inventory Inquiry
- Request Special Pricing
- Price Book Updates
- Master Price List

Accounting

Invoices

Sales Tools



- Product Cross Reference
- Training & Seminars
- Catalogs & Brochures
- IDEC Logos
- Print on Demand Manuals

Partner Resources

- FAQ
- Forum
- Approvals & Standards
- User Guide
- Product Support
- CAD Files
- Application Notes
- Contact Us

Create Order

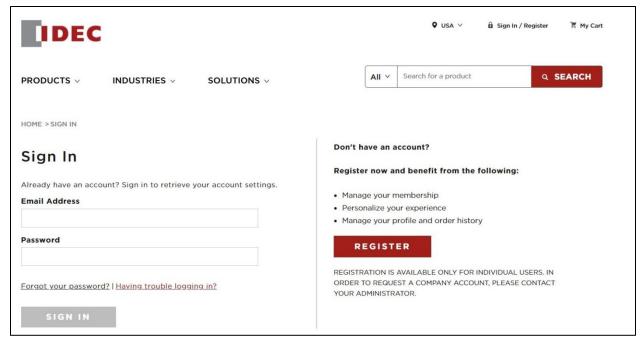
My Cart

ACCOUNT SETUP

Access - Administrator

Request a company account by contacting your company administrator so a User Administrator (Admin) can be designated. The Administrator is responsible for adding additional users, activating and changing user roles, resetting passwords, as well as deactivating employees when they leave or no longer need access to the portal. Users will be unable to change company information unless they have Administrator access.

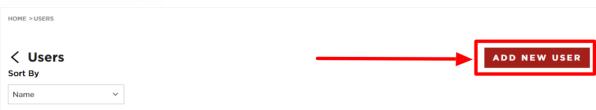




Once the Administrator has been established by IDEC your new administrator can register additional users accounts directly on the website by accessing the "My Company > Users & Company > Manage Users > Add New User" section.







Name	Roles	Parent Unit	Status
Roger	Orderer		Enabled
William	Sales		Enabled
Lisa	Sales		Enabled
<u>Cindy</u>	Accountant		Enabled



HOME > USERS > NEW

< Add New User First Name

	
Last Name	
	□
Email	
	•••
Parent Unit	
030222-02-us	~
Roles	
Administrator	
Administrator Auth Only	
Management	Your IDEC account ID
Accountant	automatically populated
Sales	when your ADMIN creates
Orderer	a new user
Orderer without Create Order	
Sales without Net Price	
CANCEL	SAVE

Note: An email address with a company domain must be used. For example, email addresses ending in @gmail, etc. are not valid for access to the partner portal.

Assign a user ROLE to provide access to different levels of Partner Portal functionality. Sales is a good default if you are unsure.

Users and Access Levels:

1. Admin - Superuser

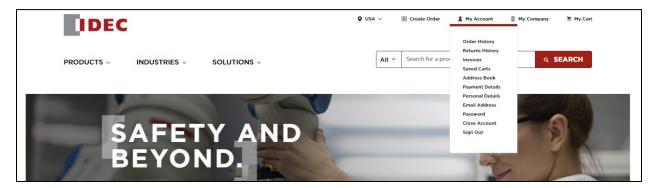


- 2. Admin Auth Only Manage new users
- 3. Management View only
- 4. Accounting Financial details
- 5. Sales Compiles and Requests the order
- 6. Orderer Places the order
- 7. Orderer without Create Order Can only create orders
- 8. Sales without Net Price Sales user with price view restriction

Enter the requested information then click on SAVE.

MY ACCOUNT

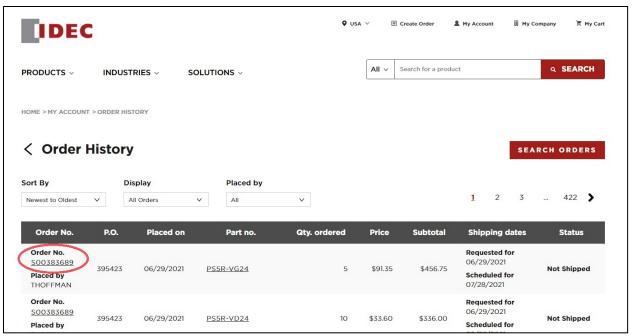
My Account allows you to access your personal information. Click on the My Account link at the top of the page to access order history or contact info, to change a password, and more.



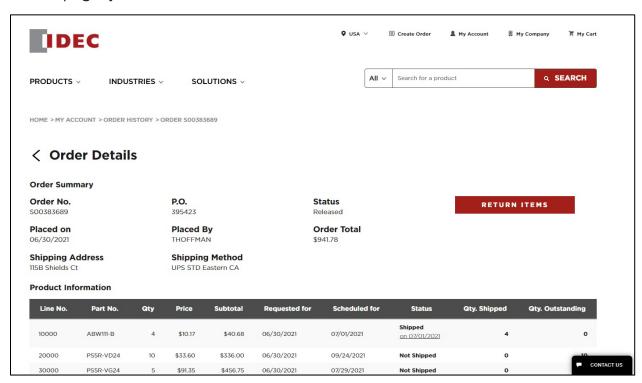
Order History

Click on Order History in the dropdown menu. Order History enables you to display by date and PO number, as well as choose which orders to display dependent on status or who they were placed by.



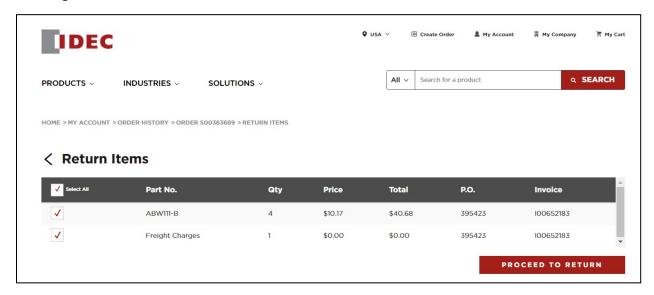


To view an order, click the link with the specific Order No. displayed. From the Order Details page, you can also click the Return Items button.





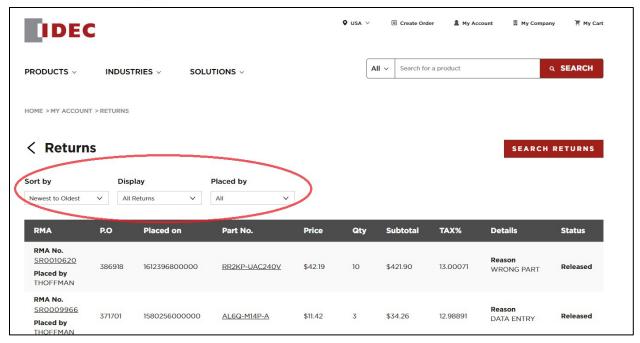
On the Return Items page, part numbers can be selected and processed for return by clicking Proceed to Return.



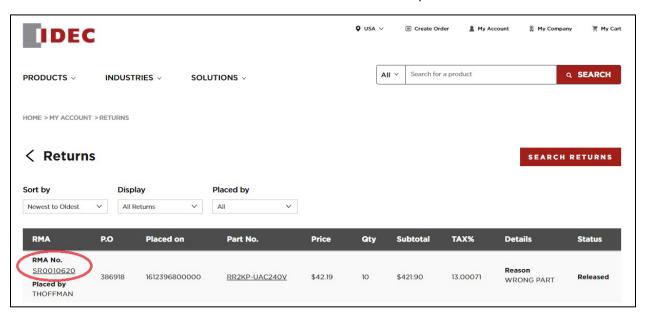
Returns History

Click on Return History in the dropdown menu. Return History allows you display returns by date, status, or who placed the order.

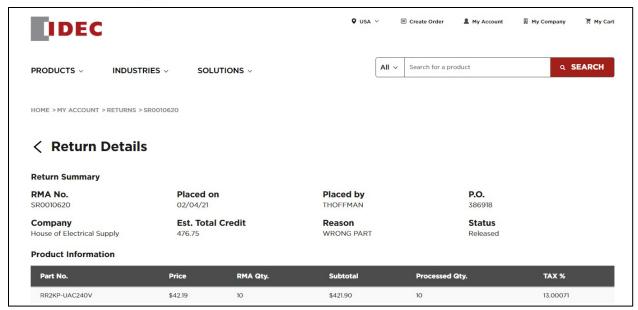




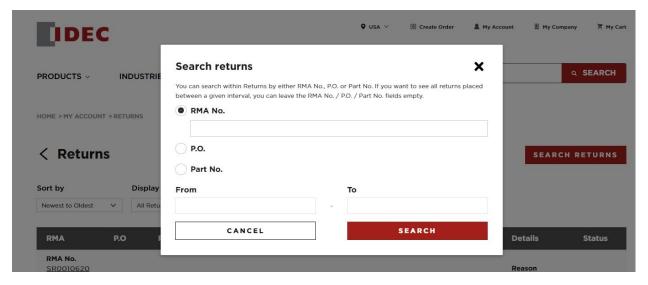
To see Return Details, click on the RMA number for the specific return.







You can also click the Search Returns button to search by specific RMA number, PO, or part number.

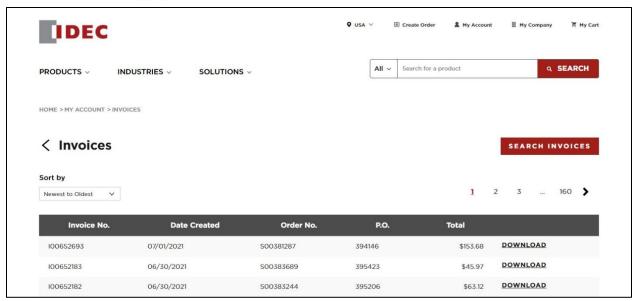


To see all returns placed between a given interval, fill out the date range and leave the other fields empty. Then click Search.

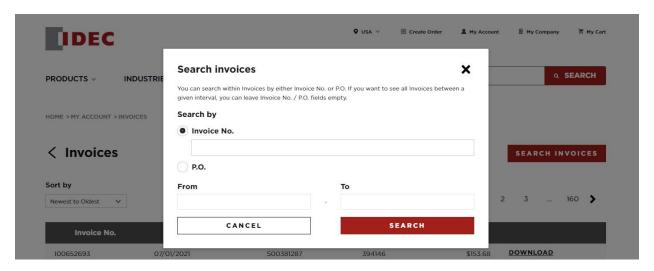
Invoices

Click on Invoices in the dropdown menu.





From here, you can view a list of past invoices by date, as well as download PDFs of specific invoices.



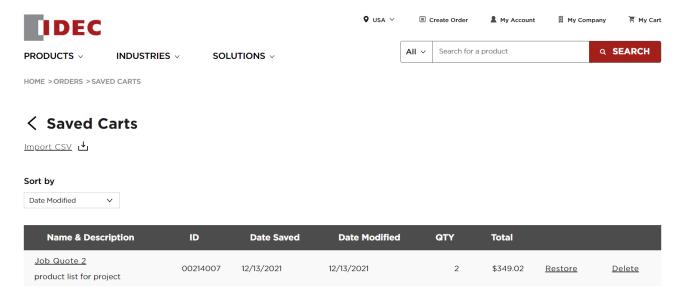
Users can also click to Search Invoices by invoice number, purchase order, or date range. Set the parameters then click Search.

Saved Carts

Click Saved Carts to view all previously saved carts or to import a CSV to Saved Carts for future use. This can be a valuable tool when a user wants to save a shopping cart



for later or share with a colleague. This is used when a user wants to save a shopping cart for later or share it with a colleague.

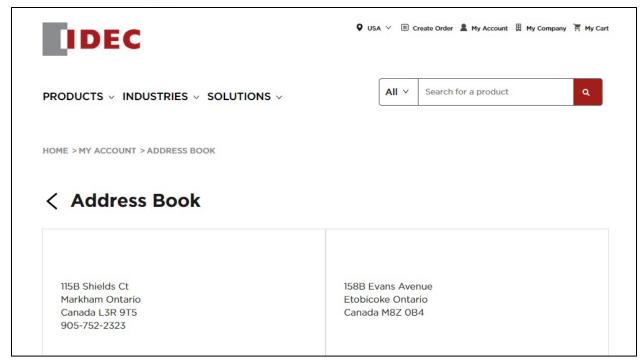


Address Book

Click Address Book to view all available saved addresses. Only B2C users can add/edit/delete addresses at any time.

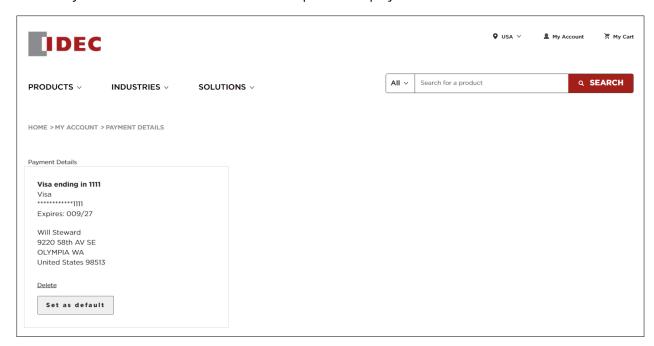
If you are a partner with B2P access and would like to add a new shipping address contact IDEC at opencontact@us.idec.com





Payment Details

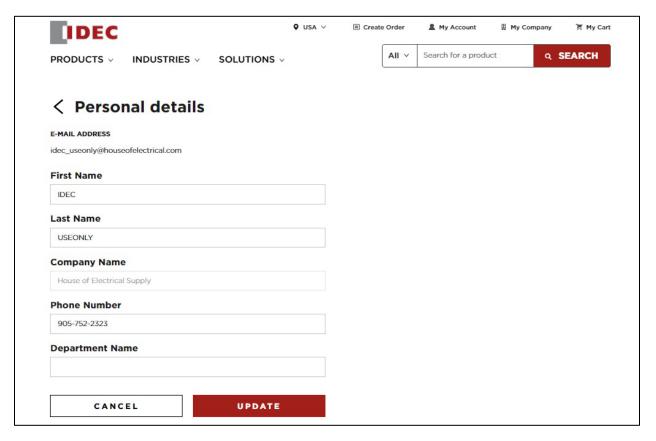
Click Payment Details to view details of previous payments on orders.





Personal Details

Click on Personal details.



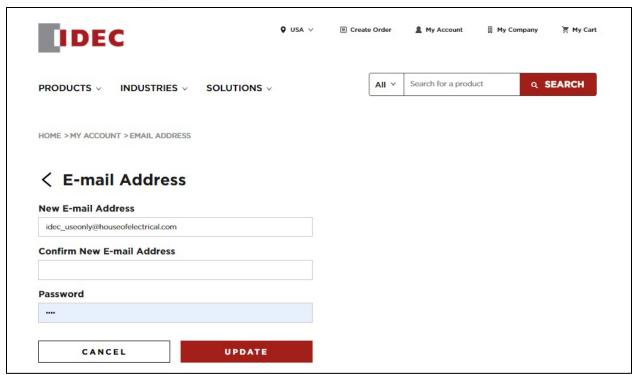
From here, you can change name, phone number, or department name and click Update.

Note: Company Name is displayed for reference only and not editable by end users.

E-mail Address

Click E-mail Address to confirm the use of an updated e-mail address in the system.





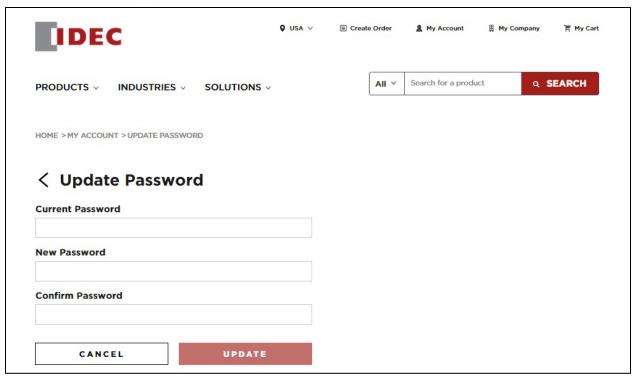
Enter the new email address, confirm the new email address, then enter your password and click Update.

Note: If you have a partner B2P account changing your email address from the company domain will not be accepted. For example, email addresses ending in @gmail, etc. are not valid for access to the partner portal.

Password

Click Update Password.



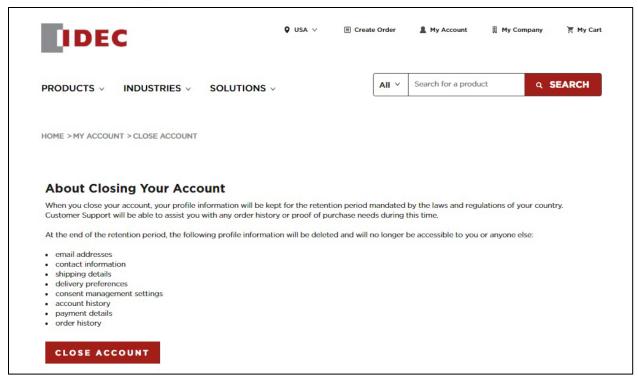


Enter the current password and new password. Then confirm your new password to update the password in the system. Passwords must be a minimum of 8 characters in length with at least 1 uppercase letter, 1 lowercase letter and 1 number.

Close Account

Click Close Account for details on closing your account and to confirm closure.





Click the Close Account button to confirm.

Sign Out

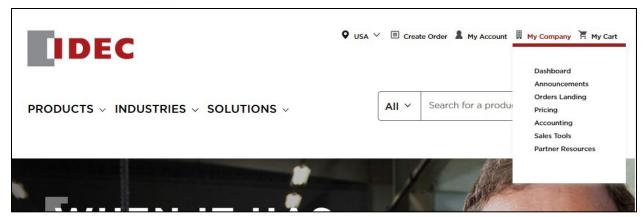


Click Sign Out to sign out of your account.

MY COMPANY

My Company allows you to access company information. Click on the My Company link at the top of the page to access your dashboard and announcements, place bulk orders, review past orders, view pricing, check inventory and access additional partner resources.





Dashboard

Announcements

Click Announcements to view recent company and product news and updates.



HOME > PARTNER DASHBOARD

Partner Dashboard

Update on Warehouse Operations Regarding Coronavirus Conditions

At the outset, I would like to thank all of you for your support in helping us finish the year with a solid quarter. The quarter ending in December was one of the strongest calendar year 4th quarters experienced by IDEC in the US. We appreciate your patience with challenges in shipping caused by Covid related delays in our warehouse. As we get into the new year we face additional challenges. As many of you are aware, there are shortages and delays in shipping capacities. Ports are having a difficult time keeping up with the back log. These delays have sent our systems in to disarray, dates that are in the systems, or , churned out by the system (IDA) , are no longer reliable. We strongly recommend that you call or email IDEC customer service and or sales personnel to get more reliable information. We expect these delays to take a few months to sort themselves out. IDEC is committed to providing the best service we can to our partners and customers and continue to investigate and evaluate all possible alternatives. We continue to experience good demand for our products and forecast increased demand, going into the next 2 quarters. We hope you are seeing the same and will act accordingly to increase your inventories.

Announcements

View all announcemen

New IDEC website launched

04/07/2020

We at IDEC are excited to roll out our new updated website in addition to having new updated content, improved search functions and a very robust digital platform making it all happen. We added new segments

2

Virtual Catalog discontinued

04/06/2020

The application used to view the catalog Flash is no longer supported by all major web browsers. Use the NEW search box in the upper right of the major redesign of the IDEC website.

<u>Download U910 Catalog ≥</u>

New FC6A Product Launch

04/02/2020

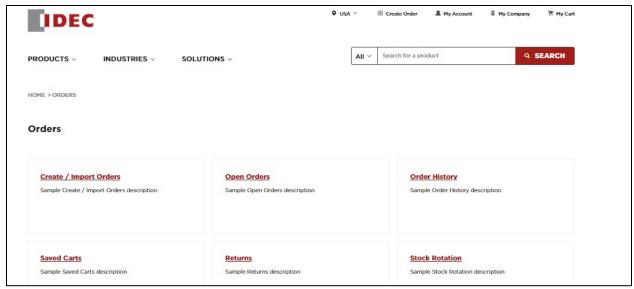
Check out our new product for APAC

new file ≥

Orders Landing

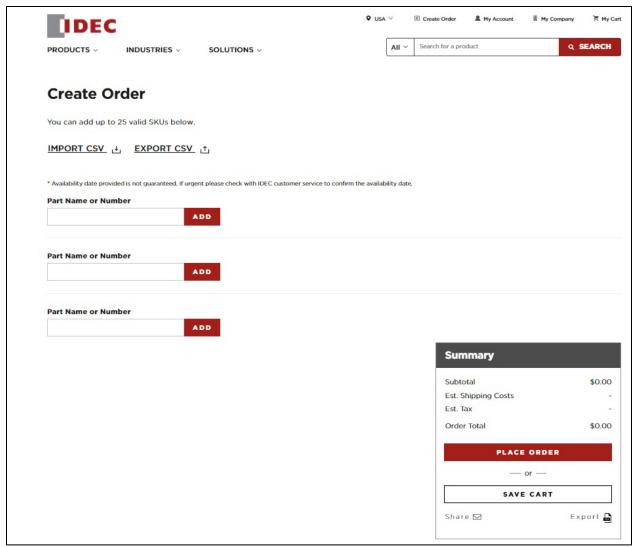
Click Orders Landing to create/import orders, open orders, view order history, view saved carts, view returns, or view stock rotation.





Create/Import Orders
 Import CSV (for orders with over 25 individual items), Export CSV (to update),
 or add parts to an order using a part name or number. Once the order is
 complete, users can click to Place Order or Save Cart (save information with
 date and note to complete later). Users can also Share via email or Export a
 PDF.

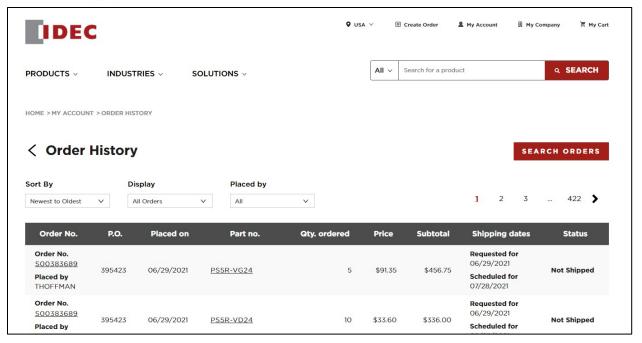




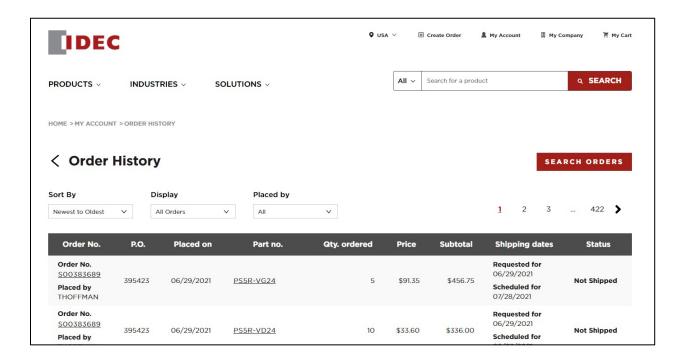
• Open Orders

Order History enables you to display by date and PO number, as well as choose which orders to display dependent on status or who they were placed by. This page will automatically filter to display only open orders by default.



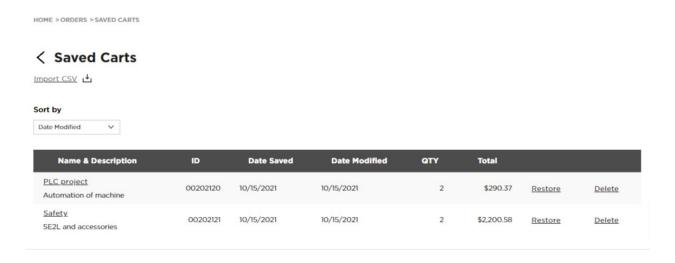


Order History
 Order History enables you to display by date and PO number, as well as
 choose which orders to display dependent on status or who they were placed
 by.



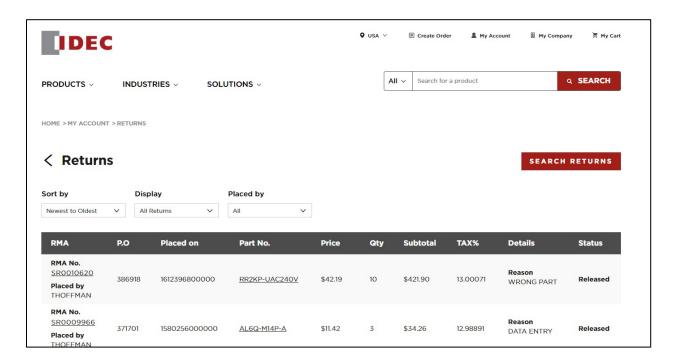


Saved Carts
 Click Saved Carts to view all previously saved carts or to import a CSV to Saved
 Carts for future use.



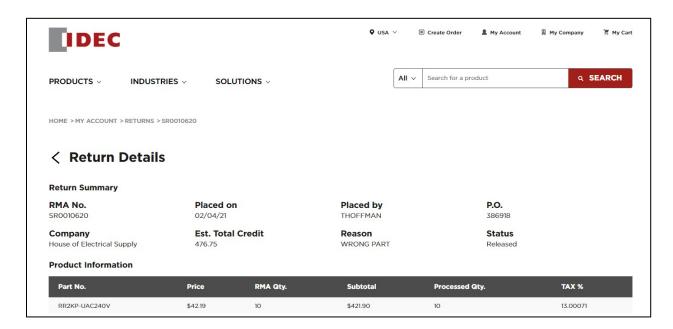
Returns

Click on Returns to see the Return History. This allows you to display returns by date, status, or who placed the order.

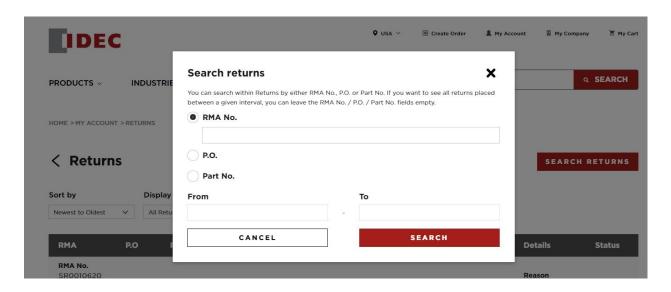




To see Return Details, click on the RMA number for the specific return.



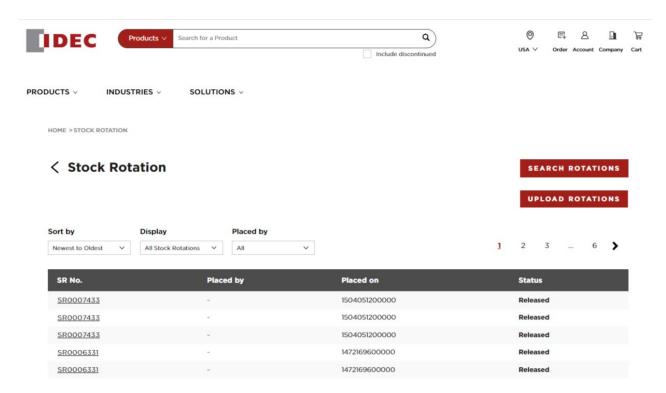
You can also click the Search Returns button to search by specific RMA number, PO, or part number. To see all returns placed between a given interval, you can fill out the date range and leave the other fields empty. Then click Search.



• Stock Rotation

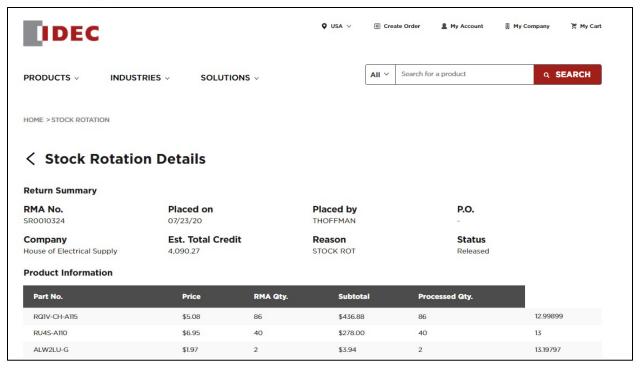


Click Stock Rotation to view stock rotation numbers and sort by date, open/closed, or who placed the rotation.



Click a specific stock rotation number to view additional details.

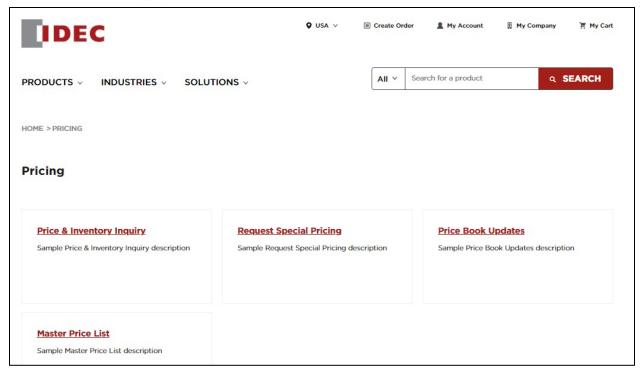




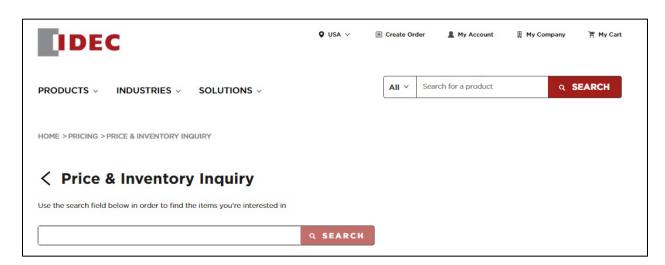
Pricing

Click Pricing to make a price and inventory inquiry, request special pricing, view price book updates, or view the Master Price List.



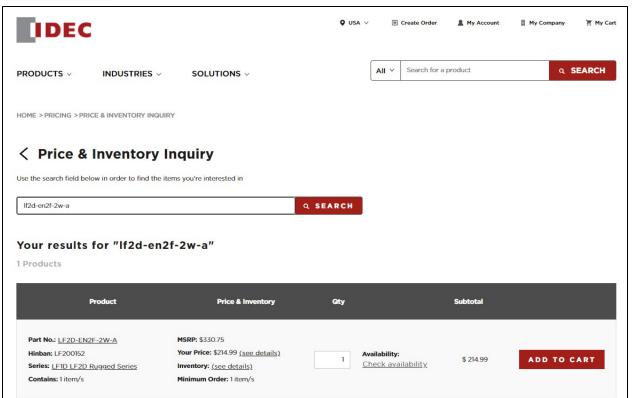


• Price & Inventory Inquiry
Click Price & Inventory Inquiry to utilize the search function.



Enter a specific part number and click search.



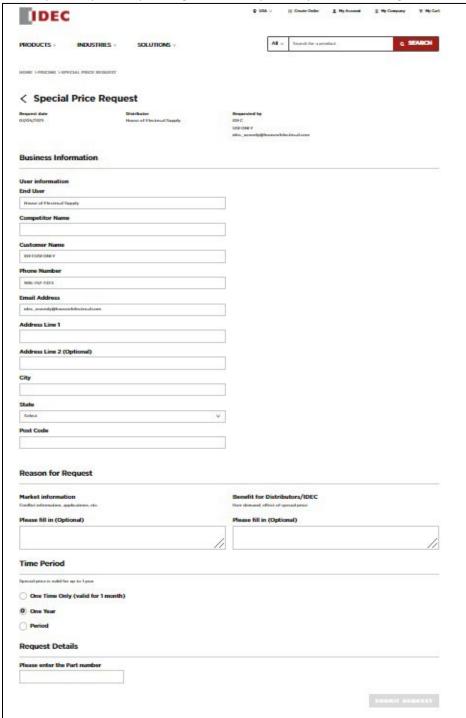


This page allows you to view details pertaining to that part number including, MSRP, your price, inventory, and availability.

• Request Special Pricing



To request special pricing, click Request Special Pricing



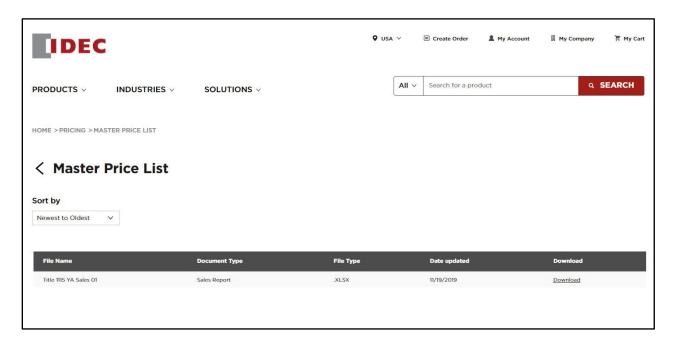
Then fill out the Special Price Request and click Submit Request at the bottom of the page.



Price Book Updates
 Click Price Book Updates to see all updates sorted by date.



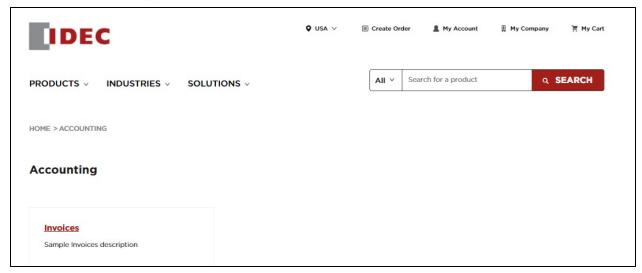
Master Price List
 Click Master Price List to view the IDEC Master Product Price list by date.



Accounting

Click Accounting to access information on invoices.

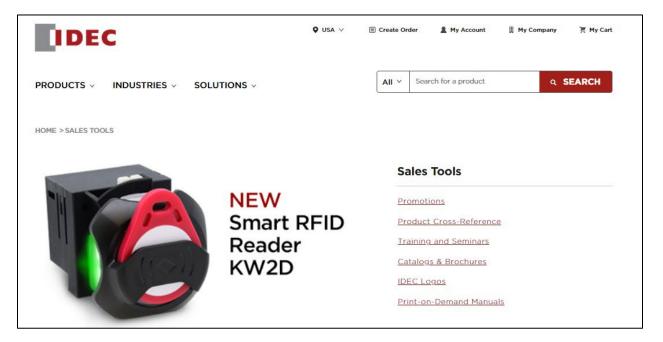




Click Invoices to view all invoices and invoice details, or to search invoices. See Invoices under My Account for additional information.

Sales Tools

Click Sales Tools to access information on promotions, product cross-reference sheets, training and seminars, catalogs & brochures, IDEC Logos, and Print-on-Demand Manuals.





Product Cross-Reference

Click Product Cross-Reference to enter a competitor part number and view comparable IDEC parts.



 Training and Seminars
 Click Training and Seminars to view a training overview, discover who should take training and what training covers, review training package options and trainers, and access additional resources.



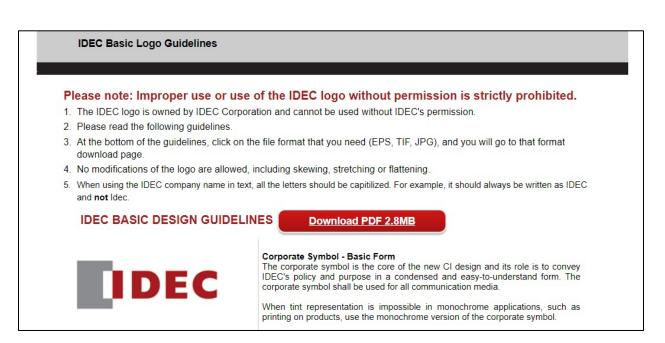
Catalogs & Brochures (UNDER CONSTRUCTION)



Click Catalogs & Brochures to access links to the Automation Forum, Product Cross-Reference, Virtual Catalog, Software Upgrades, or Training and Seminars.



 IDEC Logos
 Click IDEC Logos to view IDEC Basic Logo Guidelines, download a PDF with information on the proper usage of the IDEC logo, or download logo files in .eps, .jpeg, or .tiff.





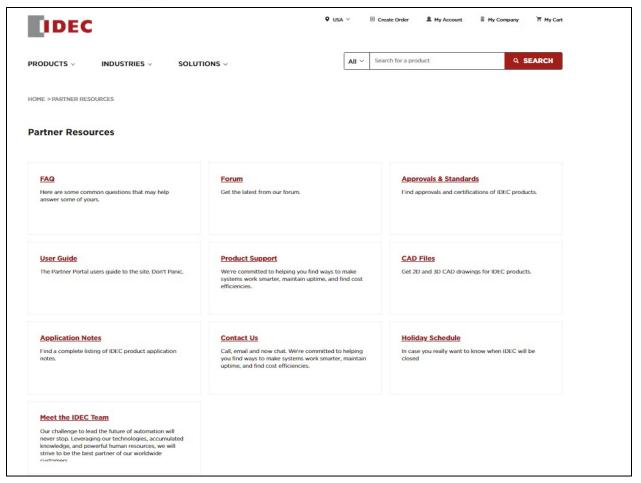
Print-on-Demand Manuals
 Click here to order hard copies of IDEC documentation and have it directly mailed.



Partner Resources

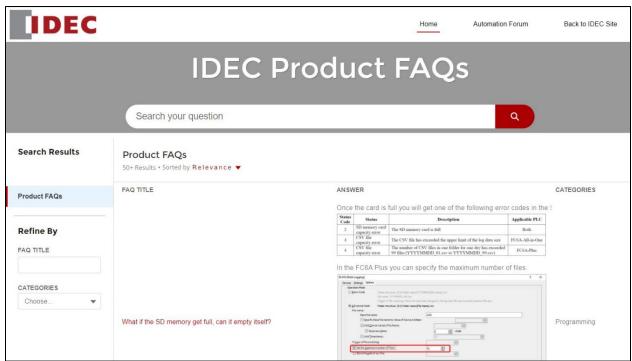
Click Partner Resources to access FAQs, the IDEC Forum, Approvals & Standards, the Partner Portal User Guide, Product Support, CAD Files, Application Notes, the IDEC Holiday Schedule, and IDEC Team information or to contact IDEC.





FAQ
 Click on FAQ to view IDEC Product FAQs.





FAQs can be searched by title, category, or by entering a question.

 Forum Click Forum to access



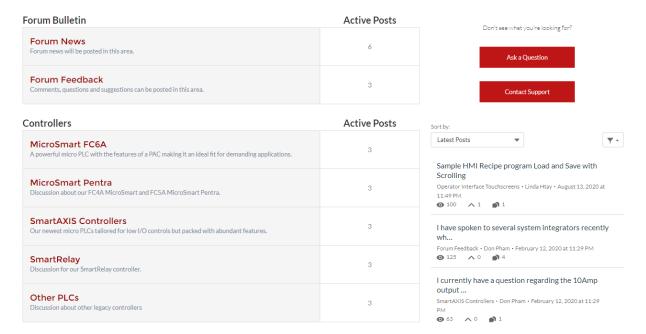




PLC HMI Forum

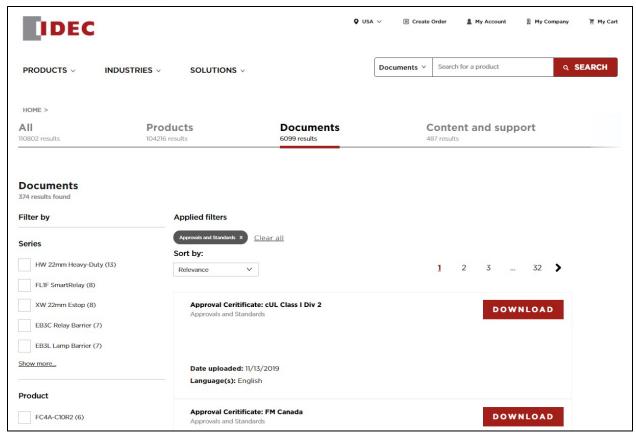
A place to search or ask for answers on all IDEC automation offerings

Get answers from experts at IDEC or our community of experienced customers.



 Approvals & Standards
 Click Approvals & Standards to search products, documents, or content and support by series, product, or category.



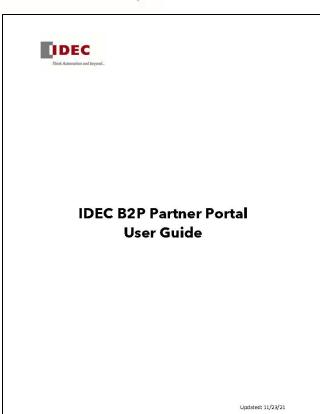


Approval certificates can then be downloaded.

• User Guide

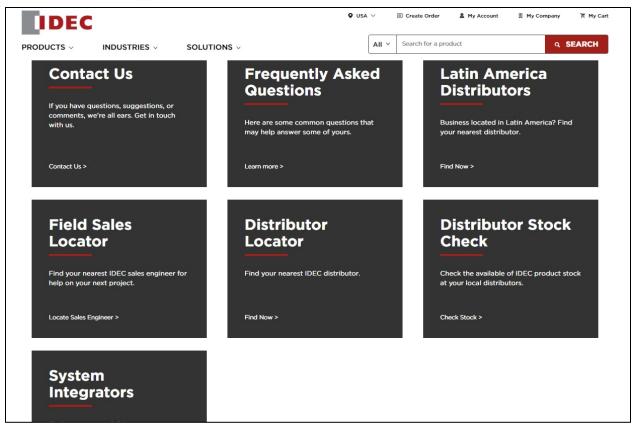
Click User Guide to find IDEC B2P Partner Portal User Guide. Users can also download the latest version of this guide here: https://us.idec.com/IDA





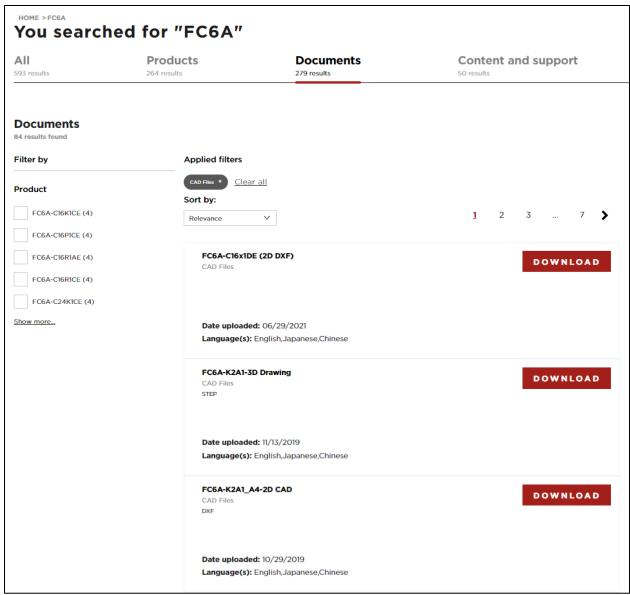
Product Support
 Click Product Support to find IDEC contact information or to access FAQs;
 Latin America distributor, Field Sales, distributor, and system integrator
 information and locations; as well as check stock.





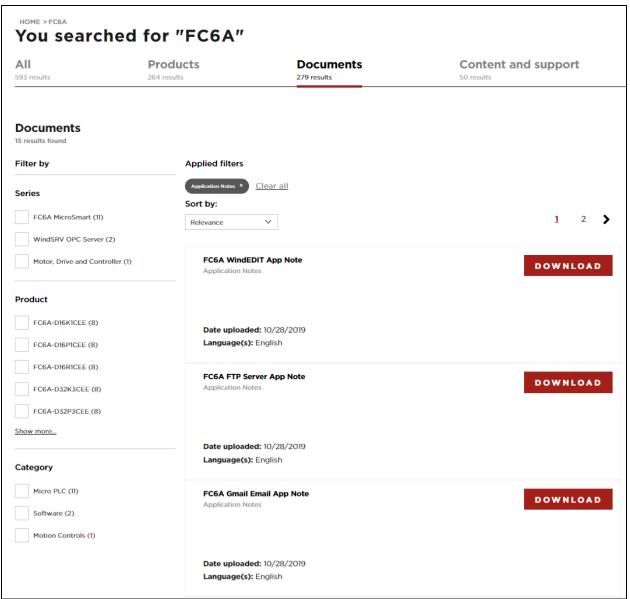
CAD Files





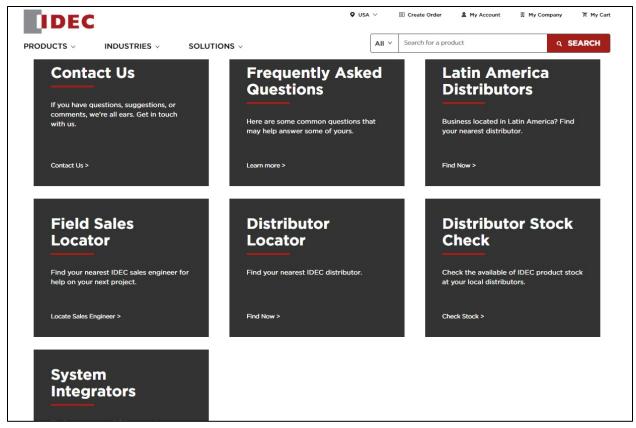
• Application Notes





Contact Us Click Contact Us to find IDEC contact information or to access FAQs; Latin America distributor, Field Sales, distributor, and system integrator information and locations; as well as check stock.



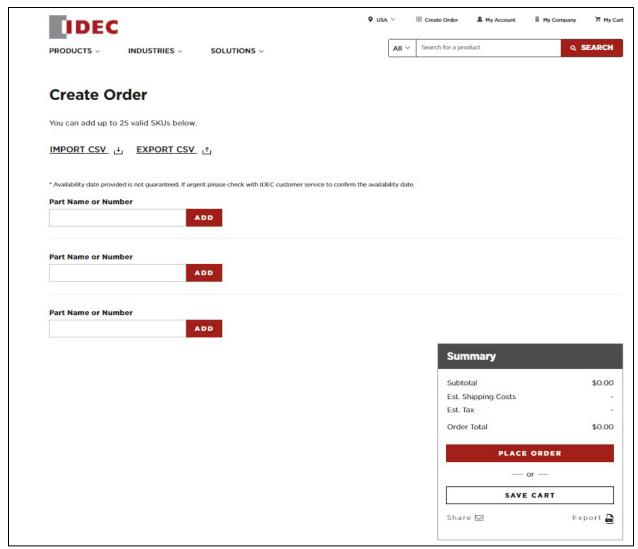


CREATE ORDER



Click on Create Order to Import CSV (for orders with over 25 individual items), Export CSV (to update), or add parts to an order using a part name or number. Once the order is complete, users can click to Place Order or Save Cart (save information with date and note to complete later). Users can also Share via email or Export a PDF.





MY CART



Click on My Cart to Checkout, View items in cart, or Continue Shopping.



