



Customer Community Portal – customer's personal account

Customer Community Portal is intended to ease the work of **INTERPIPE** customers, particularly:

- to place online requests for products purchase;
- to monitor the status of purchase request processing;
- to monitor the order status;
- to get access to the digital version of inspection certificates;
- to monitor delivery status and exact location of the trucks;
- to allow easy and convenient contacting customer support;
- to communicate with the seller via chatter and e-mail;
- to allow easy and convenient problem solving using the online system for processing appeals and claims.

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Authorization on the portal

After a Customer Community user is created for you, an e-mail with approximately the following content will be sent to your e-mail address:

Hi, TestUser

Your password has been reset for Customer Room. Go to:

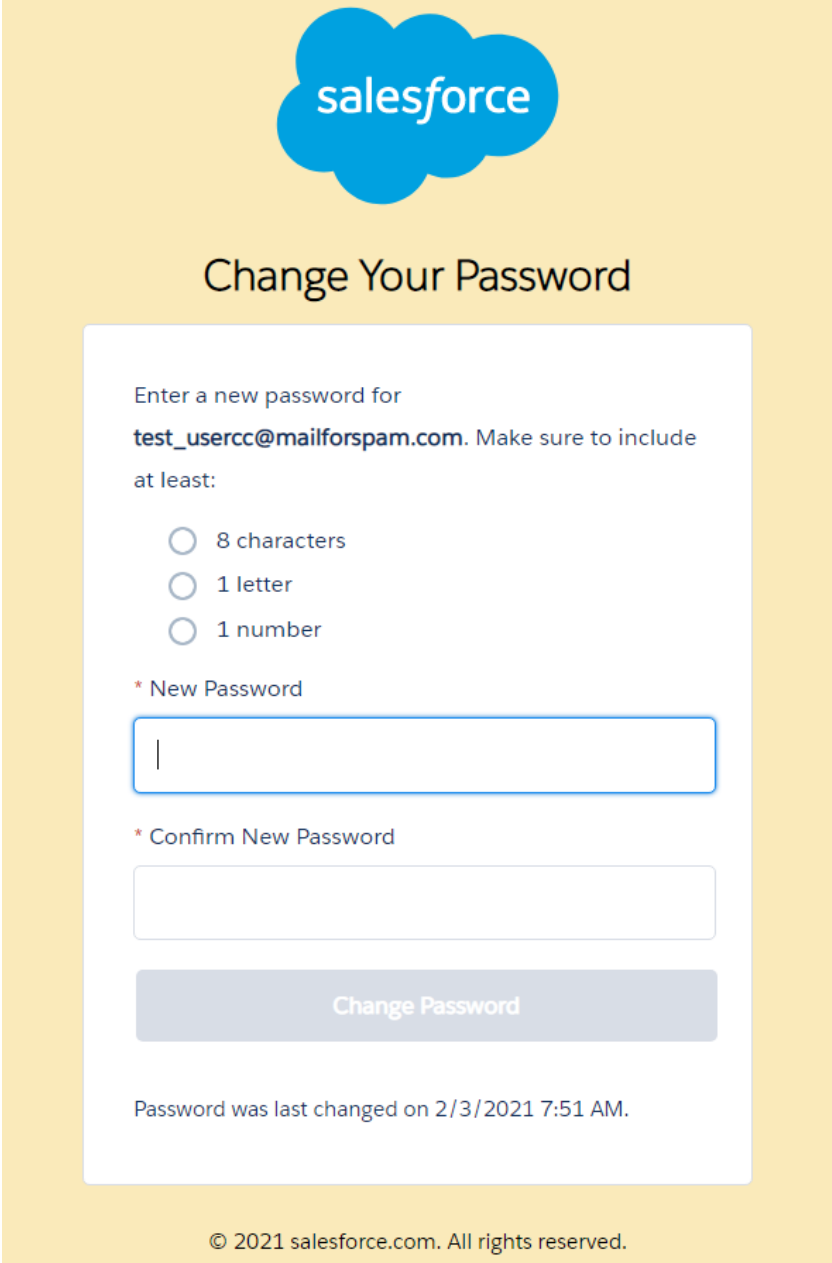
https://interpipe.cs102.force.com/CustomerRoom/login?c=DfzuUJkn2dnCEnWGq2o5t0Bk3iC6tnUG_r...

Thanks,

Interpipe

You need to go to the link contained in the e-mail, enter a new password in the authorization window, and then confirm it.

Attention! Write down your login and password and keep them in a place that is inaccessible to unauthorized persons.



The image shows a Salesforce 'Change Your Password' form. At the top is the Salesforce logo. Below it, the title 'Change Your Password' is centered. The form itself is a white box with a light gray border. It contains the following elements: a prompt to 'Enter a new password for' followed by the email 'test_usercc@mailforspam.com' and a requirement to 'Make sure to include at least:'; three radio button options: '8 characters', '1 letter', and '1 number'; a red asterisk followed by the label '* New Password' and a text input field; another red asterisk followed by the label '* Confirm New Password' and a second text input field; a gray button labeled 'Change Password'; and a status message at the bottom: 'Password was last changed on 2/3/2021 7:51 AM.' The footer of the form states '© 2021 salesforce.com. All rights reserved.'

salesforce

Change Your Password

Enter a new password for
test_usercc@mailforspam.com. Make sure to include
at least:

- ☐ 8 characters
- ☐ 1 letter
- ☐ 1 number

* New Password

* Confirm New Password

Change Password

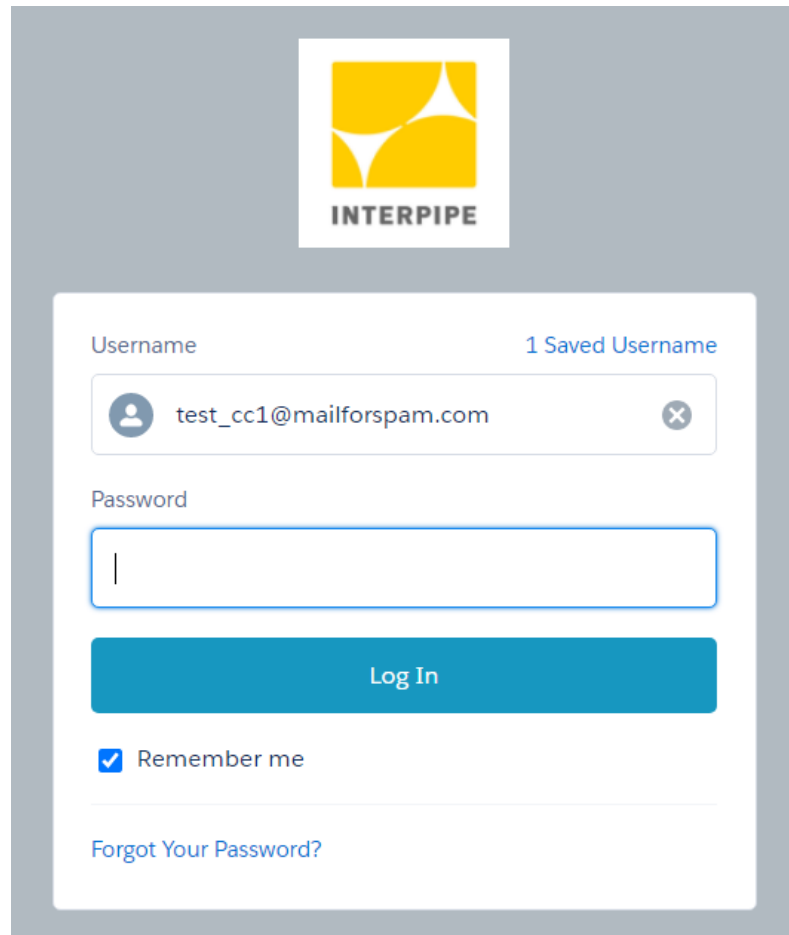
Password was last changed on 2/3/2021 7:51 AM.

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After clicking the **Change Password** button, you will get to the Customer Community Home Page (hereinafter - Home Page).

In this way, authorization of a new user and the first login to the portal is done.

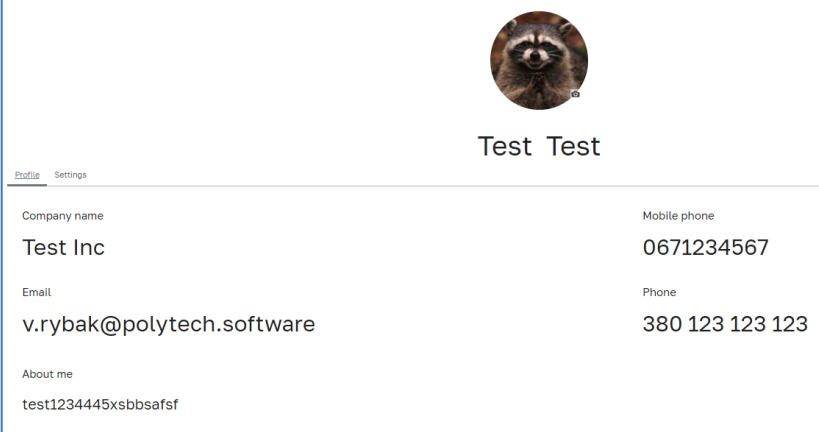
Further on, login to the portal will be done via the link <https://interpipe.force.com/NewCustomerRoom/login>, and the user authorization window will look as follows:

The image shows a login interface for Interpipe. At the top center is the Interpipe logo, which consists of a yellow square with three white curved shapes inside, and the word "INTERPIPE" in black capital letters below it. Below the logo is a white login form with a light gray border. The form has two main sections: "Username" and "Password". The "Username" section has a label "Username" and a link "1 Saved Username" in blue. Below this is a text input field containing "test_cc1@mailforspam.com" with a user icon on the left and a close button (X) on the right. The "Password" section has a label "Password" and a text input field with a vertical cursor. Below the password field is a blue "Log In" button. Underneath the button is a checkbox labeled "Remember me" which is checked. At the bottom of the form is a link "Forgot Your Password?" in blue.

Here you can tick **Remember me** in order to skip entering your username every time you login the portal.

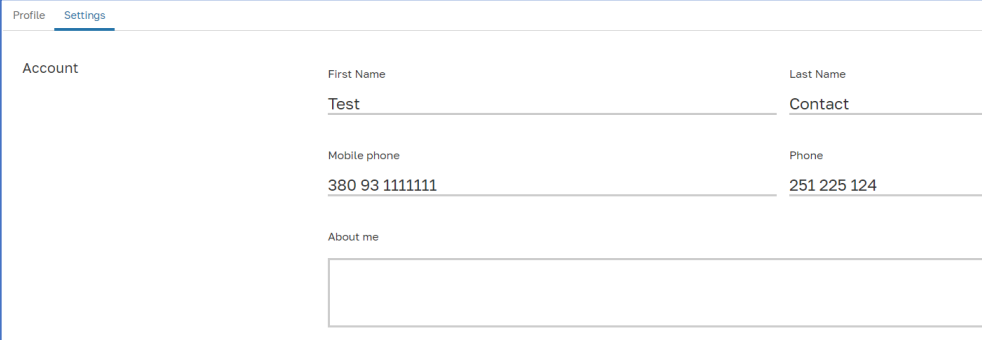
User profile settings

By clicking the button with the user's avatar on the main menu, you will get to the page for setting up your profile.

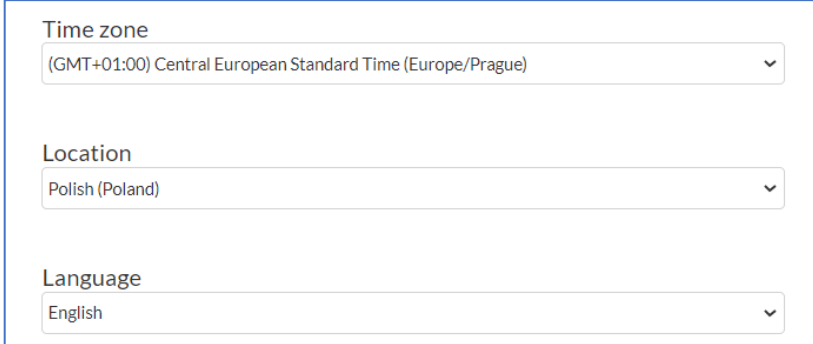


The image shows a user profile settings page. At the top, there is a circular profile picture of a raccoon and the name 'Test Test'. Below this, there are two tabs: 'Profile' and 'Settings'. The 'Profile' tab is active. The page is divided into three sections: 'Company name' with the value 'Test Inc', 'Email' with the value 'v.rybak@polytech.software', and 'About me' with the value 'test1234445xsbsbsfsf'. On the right side, there are two fields: 'Mobile phone' with the value '0671234567' and 'Phone' with the value '380 123 123 123'.

Here you can change your avatar or profile photo, and also – by going to the **Settings** tab – change your data: phone number and/or mobile phone, personal information, time zone, localization, etc.



The image shows a user settings page. At the top, there are two tabs: 'Profile' and 'Settings'. The 'Settings' tab is active. The page is divided into three sections: 'Account', 'First Name' with the value 'Test', and 'Last Name' with the value 'Contact'. Below these, there are two fields: 'Mobile phone' with the value '380 93 1111111' and 'Phone' with the value '251 225 124'. At the bottom, there is a section 'About me' with a text input field.



The image shows a user settings page. It has three sections: 'Time zone' with a dropdown menu showing '(GMT+01:00) Central European Standard Time (Europe/Prague)', 'Location' with a dropdown menu showing 'Polish (Poland)', and 'Language' with a dropdown menu showing 'English'.

Also, by using the **Reset Password** button, the current password to login the portal can be changed.

Reset Password

Log out

At the end of the work, you can log out of the portal by clicking the **Log out** button.

Orders – customer orders at various stages of fulfillment

Orders						
All orders 91 Active 62 Shipped 20 Closed 9 Drafts 20						
Choose a date: From <input type="text"/> To <input type="text"/>						
Order Number <small>↑</small>	ERP Number	Date <small>↑</small>	Stage <small>↑</small>	Quantity(t)	Produced(t)	Dispatched(t)
MEO20/0261	1234554612	04.10.2022	Active	1.78	2.386	1.338
MEO20/0261	2580	04.10.2022	Active	10	2.386	1.338
MEO20/0261	98765	04.10.2022	Active	40	2.386	1.338
MEO20/0261	12345546	03.10.2022	Active	1.78	2.386	1.338

Purchase orders and their statuses

As soon as the request for purchase of products is processed by the seller, prices, volumes and delivery terms are agreed, an order for manufacture of products specified in the request is formed. The order created by the seller is available for viewing on the portal – by using the Orders item in the main menu:

INTERPIPE

Orders

Claims

Support

Files

EN

Test

Orders

All orders91

Active62

Shipped20

Closed9

Drafts20

Choose a date:

From

To

Order Number	ERP Number	Date	Stage	Quantity(t)	Produced(t)	Dispatched(t)	Delivered acc to Incoterms(t)
MEO20/0261	1234554612	04.10.2022	Active	1.78	2.386	1.338	0
MEO20/0261	2580	04.10.2022	Active	10	2.386	1.338	0

The given table shows all the headers of the Orders. To see the details of the Order composition and status, click on the line in the **Order Number** field. Detailed information about the order will appear.

The specific order state and status can also be viewed by selecting that status on the tabs **Active**, **Shipped**, etc.

By clicking on the **Order Number** field, order details can be viewed (all order items with their statuses).

Order MEO20/0261

Delivery Status

Stage: Activated

Order Products

Details

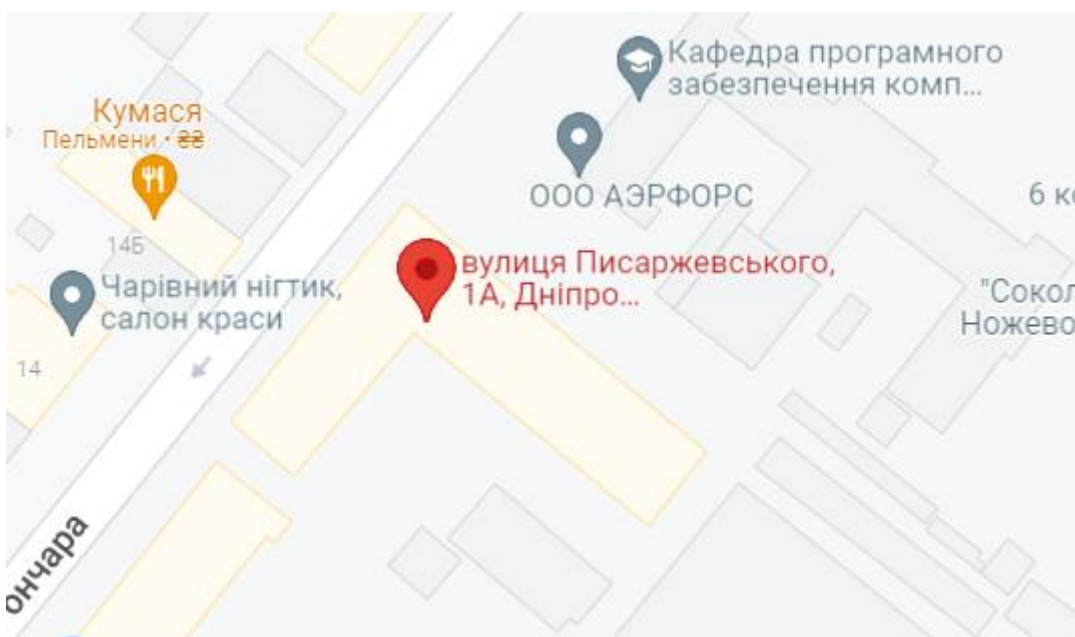
Product	Name	Quantity (t)	Stage	Produced (t)	Dispatched (t)	Delivered acc to Incoterms (t)	Unit Price
10-20Г 245.000xnull 4000-12300	LP	0.89	Drafting	1.193	0.669	0	550 USD
10-20Г 245.000xnull 4000-12300	LP	0.89	Cancelled	1.193	0.669	0	550 USD

By clicking the **Delivery Status** button, the delivery status of each order item can be viewed, detailed by means of transport, and delivery of each item can be tracked by GPS coordinates.

Order product: P265GH TC1 219.100x8.000 6000-6300 (Item # 22-007932-001)													
Car #	Doc #	Date of ...	Certific...	Get Certificate	Qty (pcs)	Qty (t), ...	Qty (t), ...	Length, m	Date/Ti...	Country	Place	Status	
1	AP3257EM/...	30864144	Nov 21, 2022	22B3042	22B3042	20.000	5.314	5.284	123.660	12.12.2022 ...	Bulgaria	бул. Христо Бот...	Delivered
2	AE8283KP/...	30997069	Dec 8, 2022	22 3173	22 3173	2.000	0.530	0.528	12.420	21.12.2022 ...	Bulgaria	Plovdiv, Bulgaria	Delivered

Besides, a quality certificate in electronic format (PDF) can be obtained by clicking the **Get Certificate** button.

By clicking on the link in the **Place** field, the current location of the vehicle that delivers the selected order item can be shown on the Google map.



Claims – customer claims at various stages of fulfillment, with possibility of creating a new claim

Claims

Create Claim

All Claims 6Registered 0Being considered 1Declined 2Accepted 0Draft 3

Choose a date: From To

Number	ERP Number	Date of Claim	Stage	Owner
0000003	22-04-103	14.04.2022	Being considered	Test Contact
0000004	22-04-110	18.04.2022	Declined	Test Contact
0000005	22-04-111	19.04.2022	Declined	Test Contact

Claim creation

A claim is created when the user clicks the **Create Claim** button.

Claims

Create Claim

The following form opens:

Create Claim

Creation Date

2023-01-04

Account

ТЕСТОВЫЙ контрагент

Segment

Europe

Currency

USD

Contract Number

Contract Date

☐ No refund

Claim Summary

Attach files

Upload Files


Or drop files

Cancel

Next

The **Upload Files** button allows you to select arbitrary files and attach them to the claim. It is possible to select a group of files at once.

Attach files

 Upload Files

Or drop files

YK 10-11-2022

22A1085.pdf

28-11 YK – mine.txt

28-11 YK.txt

1766-1,2 метр (EN 10210-1,2 EN 10216-1,2) 720829-

1803-1,2 метр (EN 10210-1,2 EN 10216-1,2).pdf

CLAIMS_CC – копія.xlsx





CLAIMS_CC.xlsx

Claims_SQL.txt

reclamationJson.txt


Users Activity 11-11-2022.xlsx

Upload Files


	Bel_Lat.txt 146 B	<div></div>	
	Na bank.txt 83 B	<div></div>	


When the files are attached, they can be removed (if necessary) by clicking the "cross" next to the file name.

Attach files

 Upload Files

Or drop files

Bel_Lat.txt - uploaded 

Na bank.txt - uploaded 

After clicking the **Next** button, the user gets to the form for selecting orders and adding products (order items) for which the user wants to file a claim. The products from different orders can be added to one claim.

Select Order

test

From Order Date creation

To Order Date creation

COC#: K LW20/0142

PO#: potest123

COC#: testnumberorder

In the **Select Order** field, the order number is entered (one of three attributes: *ITE Number*, *Add. Number*, *SF Number*).

There is also possibility of searching for orders by part of the number (as in the screenshot), as well as selecting orders by filter for the period, by the date of creation ("From Order Date creation" and "To Order Date Creation" fields).

When the order is selected, a button to select order items for the claim appears.

Select Order

Enter Order number...

From Order Date creation

To Order Date creation

Order : potest123

Delete order potest123

>

After this button is pressed, detailing of the selected order opens.

Order : TEST PO#

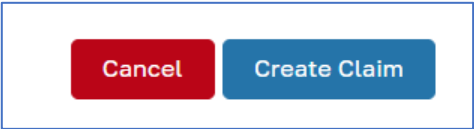
Delete order TEST PO#

#	Name	Order quantity	Meas. unit	Order Price	Claim quantity	Claim Sum	Mismatch Type ?
<input checked="" type="checkbox"/>	B 219.100x10.310 9000-10000	6180.125	ft	999.96	10	9999,6	--- None ---
<input type="checkbox"/>	B 219.100x10.310 9000-10000	188.3702	pcs	1000.00		0	--- None ---
<input type="checkbox"/>	B 219.100x10.310 9000-10000	100.000	t	1000.00		0	--- None ---

Here, the user selects the item(s) ("ticks" in the # field), enters the quantity, and selects the type and subtype of the inconsistency.

If another order is to be selected, the user repeats the steps for selecting the order and selecting the product items.

When the claim is created, the user saves it by clicking the **Create Claim** button. The claim is stored in the system with the Draft status.



When the claim created by you is in the Draft status, you can adjust it – the number of products to be claimed, the claim type / subtype can be changed. To do this, open the detailing of the claim and click the **Edit** button.

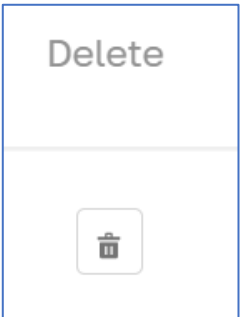
You can adjust the values in the Claim Quantity, Type and Subtype fields.

Claim quantity	Type	Subtype	Delete	Edit
5	Manufacturing	geometry		

The product can also be added to the claim by using the **Add Product** button.

Add Product

The product can be deleted by clicking the **Delete** button in the claim item.



It is also possible to delete the entire claim if it is in the Draft status.

Delete Claim


If everything is OK, the claim is sent to the back office by using the **Confirm Claim** button.

Confirm Claim

In this case, the claim gets to the system database, is registered there, and assigned with a registration number and the "Registered" status. After that, any adjustment of the claim becomes impossible.

Customer Support – go to the customer support contact form

Support



Contact customer support

How can we help you?

Account

Your name

Test Test

E-mail

v.rybak@polytech.software

Phone number

380 123 123 123

Description

Theme

Problem description

My application history

All cases 47

New 42

On Hold 2

Processing 3

Support contact	Subject	Creation date	Status	Status date
Uss	rte	29.12.2022	New	29.12.2022
Uss	rte	29.12.2022	New	29.12.2022
Uss	a	29.12.2022	New	29.12.2022
Uss	tegd	29.12.2022	New	29.12.2022
Uss	te	29.12.2022	New	29.12.2022
Uss	test	29.12.2022	New	29.12.2022
Uss	hj	29.12.2022	New	29.12.2022
Uss	test	29.12.2022	New	29.12.2022
Uss	test	29.12.2022	New	29.12.2022
Uss	test	23.11.2022	On Hold	24.11.2022
Uss	Tecr	10.11.2022	Processing	24.11.2022

Files – go to the list of files uploaded to the portal by the customer

Upload file

Choose a date: From To

Name	Owner	Last Change	Delete
06_V2	Aleksandr Novikov	17.06.2022	
2021_V3	Aleksandr Novikov	02.07.2021	

Communication with the support service

You can write an e-mail to customer support using the **Support** item in the main menu. If you select this menu item, a feedback form for communicating with the support service will appear.

Contact customer support

How can we help you?

Account

Your name

Test Test

E-mail

v.rybak@polytech.software

Phone number

380 123 123 123

Description

Theme

Problem description

Attach files

Upload file

Send

You can select the contact person you would like to communicate, and also attach any additional files (if necessary). By default, the message is sent to the seller assigned to your company.

Here you can also adjust your contacts (**E-mail** and **Phone Number** fields), this information will be saved in your user profile.

In addition, this page stores the history of your requests, which you can view.

My application history

All cases 47 New 42 On Hold 2 Processing 3

Support contact	Subject	Creation date ↑	Status ↑	Status date
Uss	test	29.12.2022	New	29.12.2022
Uss	test	29.12.2022	New	29.12.2022
Uss	test	23.11.2022	On Hold	24.11.2022
Uss	Tect	10.11.2022	Processing	24.11.2022
Uss	test	03.11.2022	On Hold	24.11.2022

Write to manager

Case: 00001058

Details Files

Subject	Status
test	New
Creation date	Status date
29.12.2022	2022-12-29
Description	
test	

You can also write an e-mail to the seller or another employee by clicking the **Write to manager** button. In this case, the window of your default e-mail client will open, and the e-mail of the seller assigned to your company will be inserted in the **Send to** field.

Preliminary orders (Enquiries)

This feature set is available in the main menu item "Enquiries".



After entering the "Enquiries" section, you can see all your product purchase enquiries with their respective statuses.

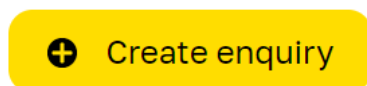


All enquiries 6	Sent 4	Processing 0	Cancelled 0	Closed 0	Drafts 2
Choose a date: From <input type="text"/> To <input type="text"/>					
Enquiry number <small>↑</small>	Creation date <small>↑</small>	Manager	Status <small>↑</small>		
2023-00081	8.2.2023	y.furman	Draft		
2023-00076	8.2.2023	y.furman	Sent		

Enquiries have the following statuses:

Draft	An enquiry has just been created and has not yet been sent to the manager. The document in this status is available for editing or deletion
Sent	An enquiry has been sent to the manager. Editing or deletion in this and the following statuses is not available
Processing	An enquiry is being processed by the manager and the back office
Cancelled	An enquiry is rejected
Closed	An enquiry is approved, agreed, and taken to work

To create a new enquiry, you need to click the "Create enquiry" button.

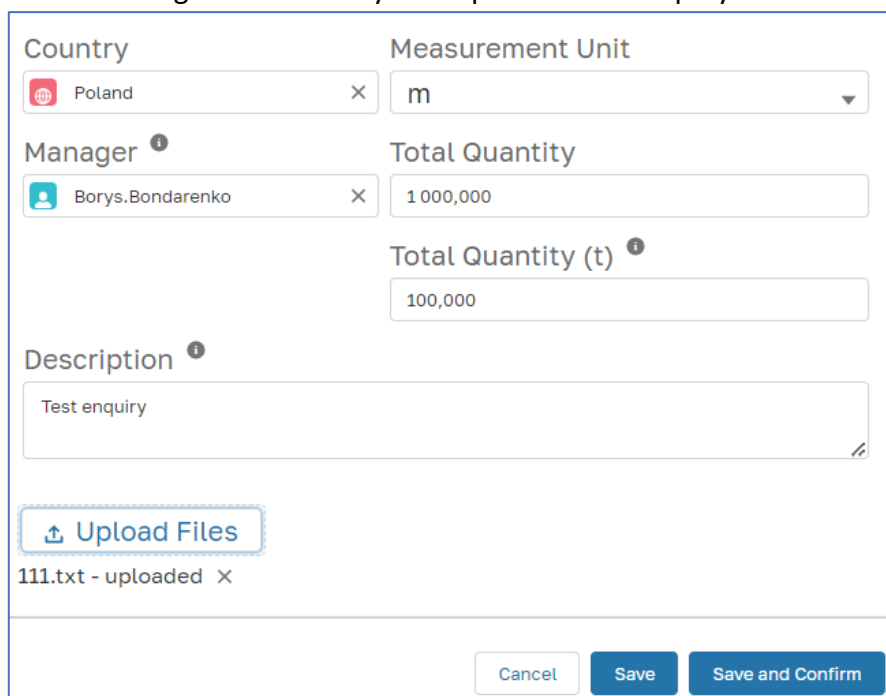


The next step is to choose the type of products to be ordered.

New Enquiry	
Select a product type	<input checked="" type="radio"/> Tubes <input type="radio"/> Wheels
<div>CancelNext</div>	

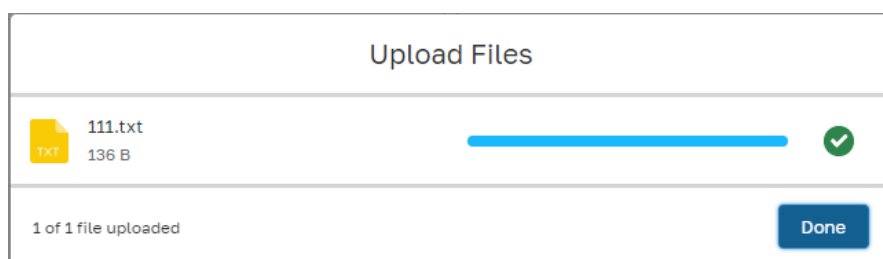
In the next window, the customer's country, and its manager (from the customer's profile) are automatically selected. In the following fields, you can select a unit of measurement (*meter*, *foot*, *piece*, and *ton* are available). The quantity in the selected units of measurement and, if desired, in tons is also specified.

You can also give an arbitrary description of the enquiry and attach any files.



The screenshot shows a form with the following fields and controls:

- Country:** A dropdown menu showing "Poland" with a close button (X).
- Measurement Unit:** A dropdown menu showing "m" with a close button (X).
- Manager:** A dropdown menu showing "Borys.Bondarenko" with a close button (X) and an information icon (i).
- Total Quantity:** A text input field containing "1 000,000".
- Total Quantity (t):** A text input field containing "100,000" with an information icon (i).
- Description:** A text area containing "Test enquiry" with an information icon (i).
- Upload Files:** A button with a plus icon and the text "Upload Files".
- File List:** Below the upload button, it shows "111.txt - uploaded" with a close button (X).
- Buttons:** At the bottom right, there are three buttons: "Cancel", "Save", and "Save and Confirm".



The screenshot shows the "Upload Files" dialog box with the following details:

- Title:** "Upload Files"
- File List:** A table showing the uploaded file:

File Name	Size
111.txt	136 B
- Progress:** A blue progress bar is shown next to the file name, and a green checkmark is visible on the right.
- Status:** "1 of 1 file uploaded"
- Buttons:** A "Done" button is located at the bottom right.

Once the data has been entered, you can press the "Save" or "Save and Confirm" button.

The "Save" button allows you to save the enquiry as a draft (in the **Draft** status), in case you plan to edit it later.

If you are sure that the enquiry drawing up is finished and no further editing is required, you can click the "Save and Confirm" button. This button allows you to save the enquiry as a final document in the **Sent** status and immediately sends it to the manager.

If the enquiry is saved as a draft (in the **Draft** status), you can send it to the manager by clicking the "Confirm" button on the enquiry form.

Edit Confirm Delete		
Enquiry number 2023-00085	Type of products Tubes	Manager Borys.Bondarenko
Country Poland	Quantity 1000	Meas. unit m ▼
Total quantity in tons 100		
Description Test enquiry		

In the **Draft** document status, the *"Edit"* and *"Delete"* buttons are also available, which allow you to edit or delete the document, respectively.

If you want to correct a document that is in the **Draft** status, click the *"Edit"* button. The fields *"Quantity"*, *"Meas. unit"*, *"Total quantity in tons"* and *"Description"* will become editable.

Country Poland	Quantity 1000	Meas. unit m
Total quantity in tons 100		
Description Test enquiry		
Save Cancel		

Once the values have been adjusted, click the *"Save"* button.

Here, you can also add or remove files. To do this, go to the *"Files"* tab and add files with the *"Upload file"* button. To delete a file, you can click the button with the image of a trash can in the *"Delete"* column.

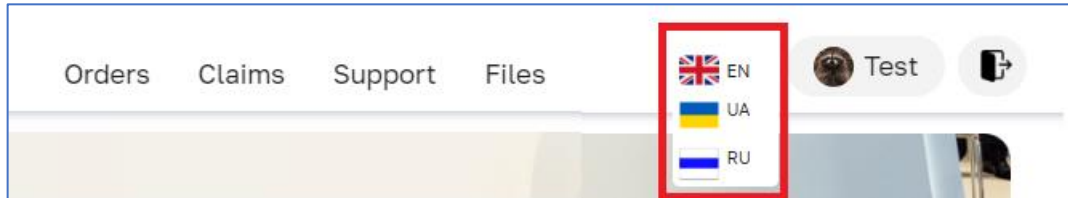
Enquiry: 2023-00085				
Status: Draft Edit Confirm Delete				
Details Files				
				Upload file
Name	Owner	Last Change	Size	Delete
111	Test Contact	10.2.2023	136 Bytes	

If you want to delete the document, click the *"Delete"* button. After confirming the operation, the enquiry will be deleted.

Multiple languages

Customer Community portal of INTERPIPE supports three languages – English, Ukrainian and Russian.

To change the language of the portal, you need to click on the ***Change the portal language*** button on the main menu of the site page.



Stock

The "Stock" tab shows the list material ready for shipment.

All orders 1	Active 1	Shipped 1	Closed 0	Drafts 0	Stock
Choose a date: From <input type="text"/> To <input type="text"/>					
	<input type="checkbox"/>	Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
	<input type="checkbox"/>	TEST COC#	259.998	222.998	65.000

By clicking the Stock tab, you will see the consolidated figures for each order. To see the figure for each item, you need to click on the "plus" button.



The button next to the order number in the table with the list of headings pulls down the details of the selected order only. If you click on this button in the header of the table, the items of all orders will pull down.

	<input type="checkbox"/>	Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
	<input type="checkbox"/>	TEST COC#	259.998	222.998	65.000
		Product	Quantity(t)	Balance for Shipment(t)	Stock(t)
		B 219.100x10.310 9000-10000	99.998	77.998	60.000
		B 219.100x10.310 9000-10000	60	45.000	5.000

The columns of the detailed part have the following fields:

Quantity (t) – total ordered quantity.

Stock (t) – quantity in stock.

Balance for Shipment (t) – not shipped quantity.

To pull up the detailed part, you need to click on the "minus" button – either in the line of a selected order (only this items will be pulled up), or in the table header (the items of all pulled-down orders will be pulled up).



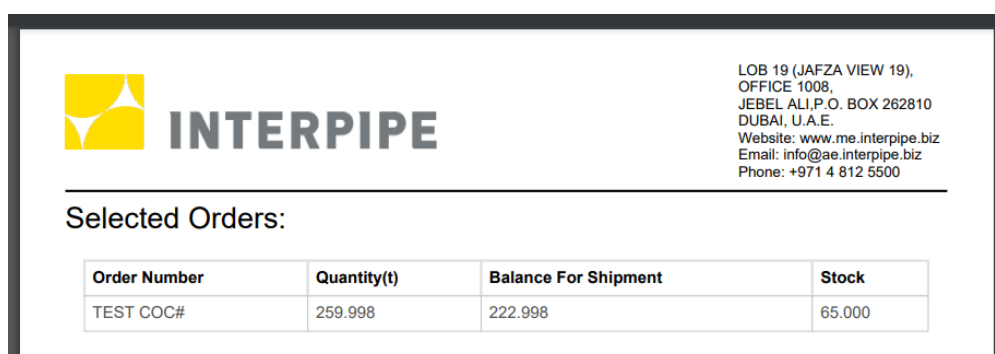
You can print out or save to a PDF file a list of orders or one order. To do this, you need to put a tick in a check box either next to a certain order, or to select all in the header of the table.

	<input checked="" type="checkbox"/>	Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
	<input checked="" type="checkbox"/>	TEST COC#	259.998	222.998	65.000

Then you need to press the "Print" button, which is at the bottom of the page, under the table with the list of orders.



A PDF file will be generated that can be either saved to the disk or printed out.



It is also possible to export the data to an Excel file. To do this, you need to select the order in the same way (tick the check box), and then press the "Excel" button.



An Excel file with the following name will be generated:

Ім'я файлу:

Тип файлу:

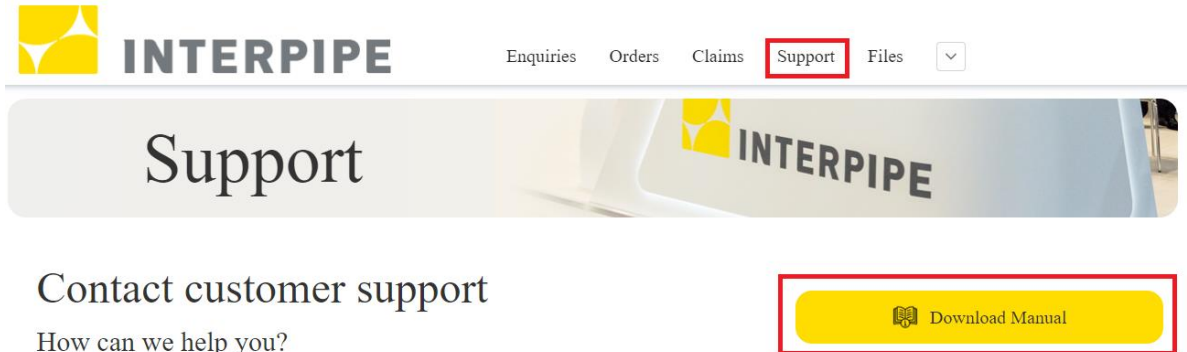
You need to save this file to the disk of your computer.

The generated Excel file will have the following structure:

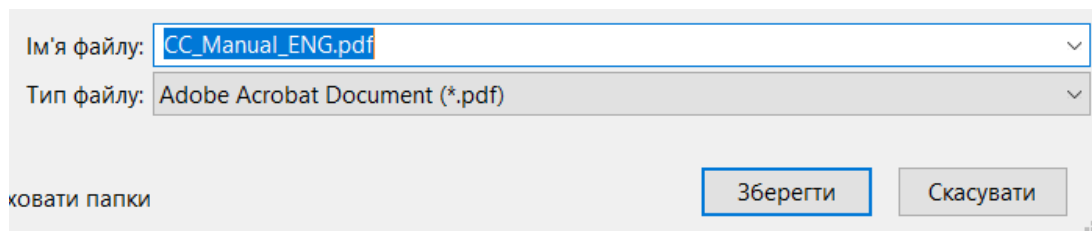
A	B	C	D	E
Order Number	Product Name	Quantity (t)	Balance For Shipment	Stock
TEST COC#	B 219.100x10.310 9000-10000	99,998	77.998	60.000
TEST COC#	B 219.100x10.310 9000-10000	60	45.000	5.000

Getting the user manual

The user manual can be downloaded in the **"Support"** tab of the client's account. To do this, you need to go to the **"Support"** section (by selecting the appropriate item in the main menu of the portal), and then click the "Download Manual" button.



In the "Save file as..." dialog box, you need to enter the desired file name (or leave the proposed by default) and click on the "Save" button. The user manual file will be saved on your computer.



Financial Balance

The "**Financial Balance**" tab shows the state of your company's financial balance with INTERPIPE.

The status of payments, no due and overdue invoice are linked to orders (if there are invoices attached to orders).

Financial balance related to documents that are not tied to specific orders are also displayed (in a separate summary line).

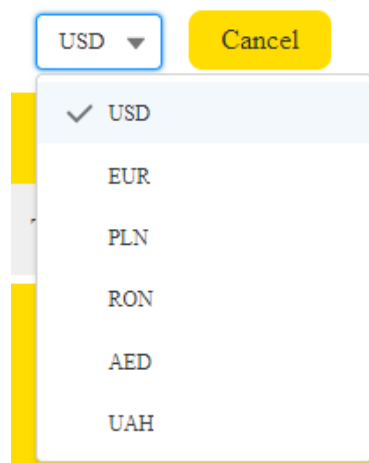
The final calculations are given at the bottom of the table:

- The line "**Total Debt (Orders)**" shows a total of all calculations ***that are tied to orders***.
- The line "**Total Debt (Other Documents)**" shows a total of all calculations ***that are not tied to certain orders*** (credit notes, etc.).
- The line "**Total Debt (Common)**" shows a grand total of calculations for the two previous lines.

USD ▾	Cancel	Choose a date:			From	<div><div></div></div>	To	<div><div></div></div>
COC #	Invoice #	Invoice Date ↑	Due Date	Days Overdue ↑	Net Amount	VAT Amount	Outstanding Debt	Currency
TEST COC#	PSI23/TEST	30.3.2023	20.4.2023	10	1 200,00	0,00	1 350,00	USD
					Total Debt (Orders):		1 350,00	USD
					Total Debt (Other Documents):		1 000,00	USD
					Total Debt (Common):		2 350,00	USD

All amounts of the financial balance are given in the currencies of the payment documents. If needed you may recalculate totals in different currency in the following way:

- If the currency is the same in all documents, the totals (*Total...*) are calculated right away.
- If the currencies in the documents are different, the totals are not calculated until a single currency is selected for calculation. To do this, you need to select the desired currency from the pull-down list, which is in the upper left corner above the table with payment details.



As of now, the portal supports conversion of amounts into the following currencies:

- *US dollar (USD)*
- *Euro (EUR)*
- *Polish zloty (PLN)*
- *Romanian lei (RON)*

- *UAE dirham (AED)*
- *Ukrainian hryvnia (UAH)*

If needed, we can add other currencies to which it would be convenient for you to transfer amounts.

If such a need exists, you can write a letter to the **Customer Community** support service.

Our e-mail: CustomerRoom.Support@m.interpipe.biz