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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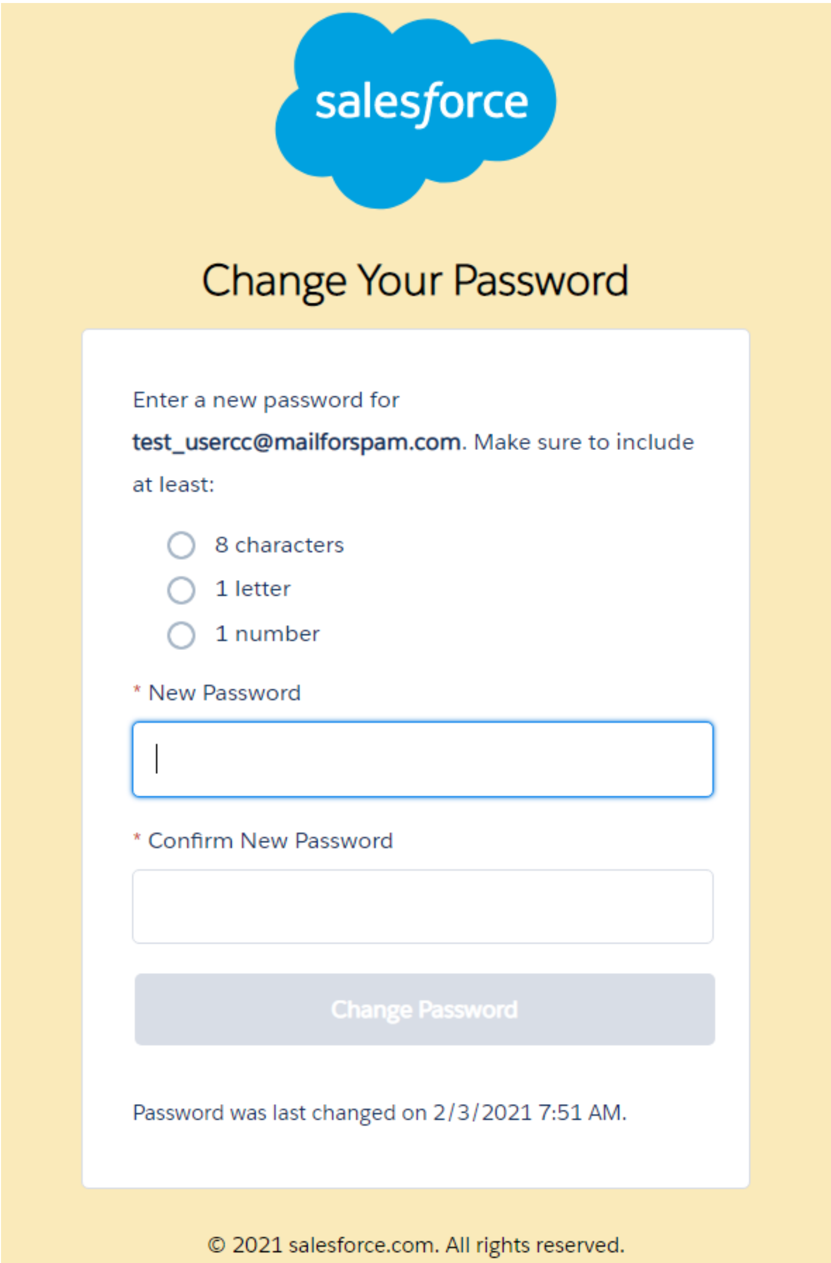
Authorization on the portal

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=DfzuUlKn2dnCEnWGg2o5t0Bk3iC6tnUG_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.

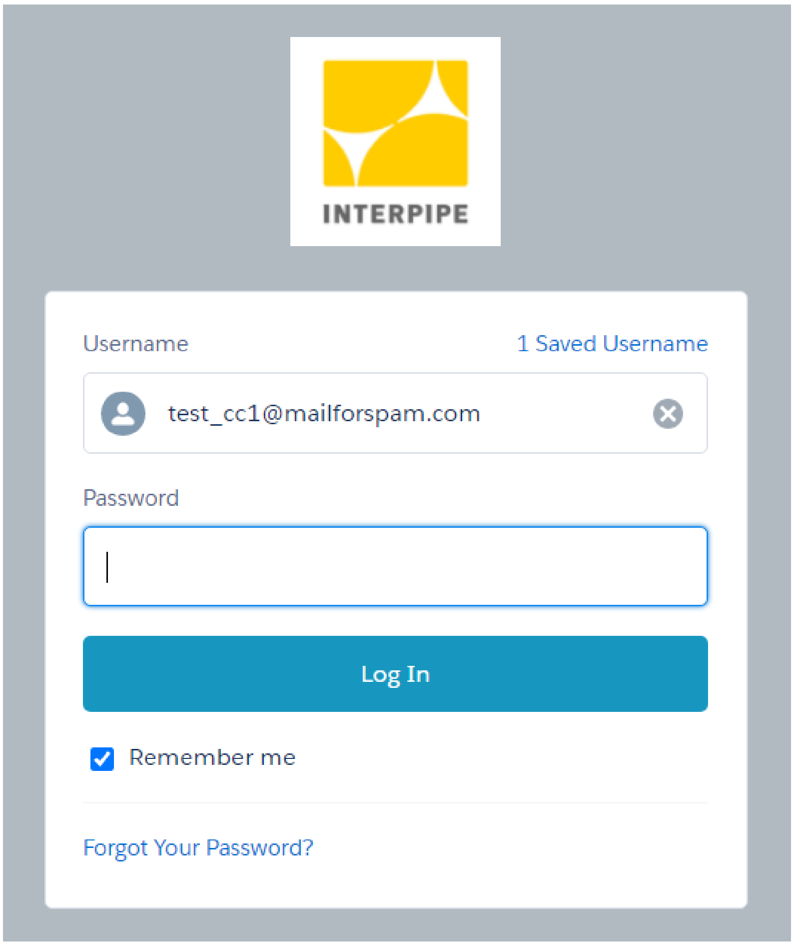
Attention! *Write down your login and password and keep them in a place that is inaccessible to unauthorized persons.*



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.

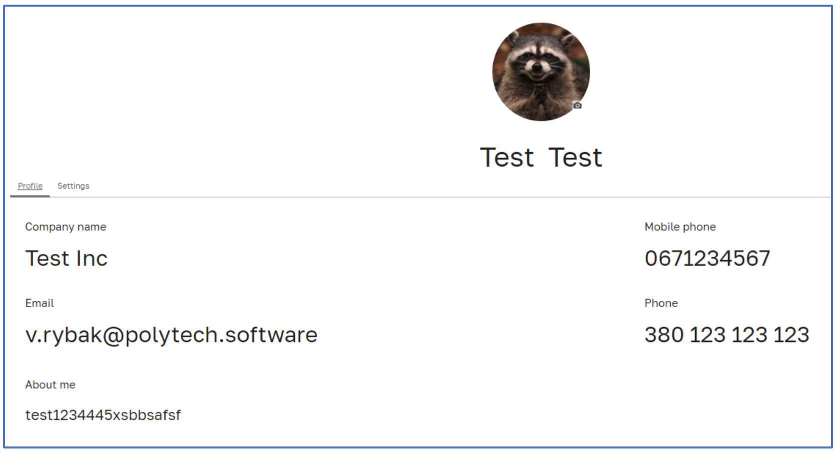
Further on, login to the portal will be done via the link https://interpipe.force.com/NewCustomerRoom/login, and the user authorization window will look as follows:



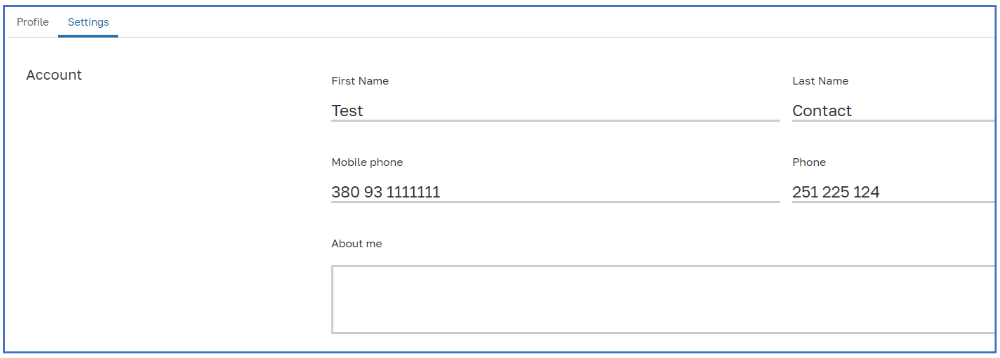
Here you can tick ***Remember me*** in order to skip entering your username every time you login the portal.

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.



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.

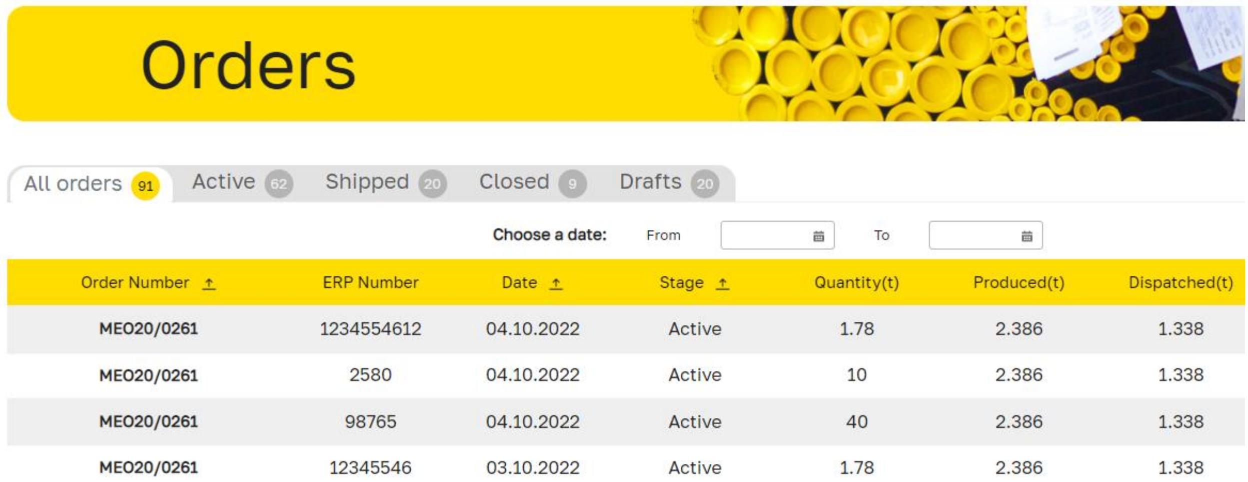


Also, by using the ***Reset Password*** button, the current password to login the portal can be changed.

Log out

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

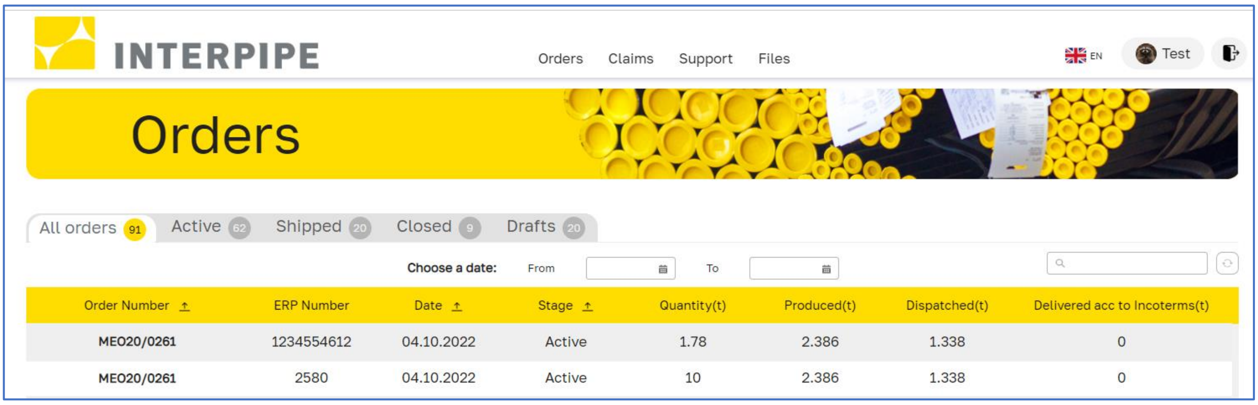
Orders – customer orders at various stages of fulfillment



Order Number	ERP Number	Date	Stage	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:



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

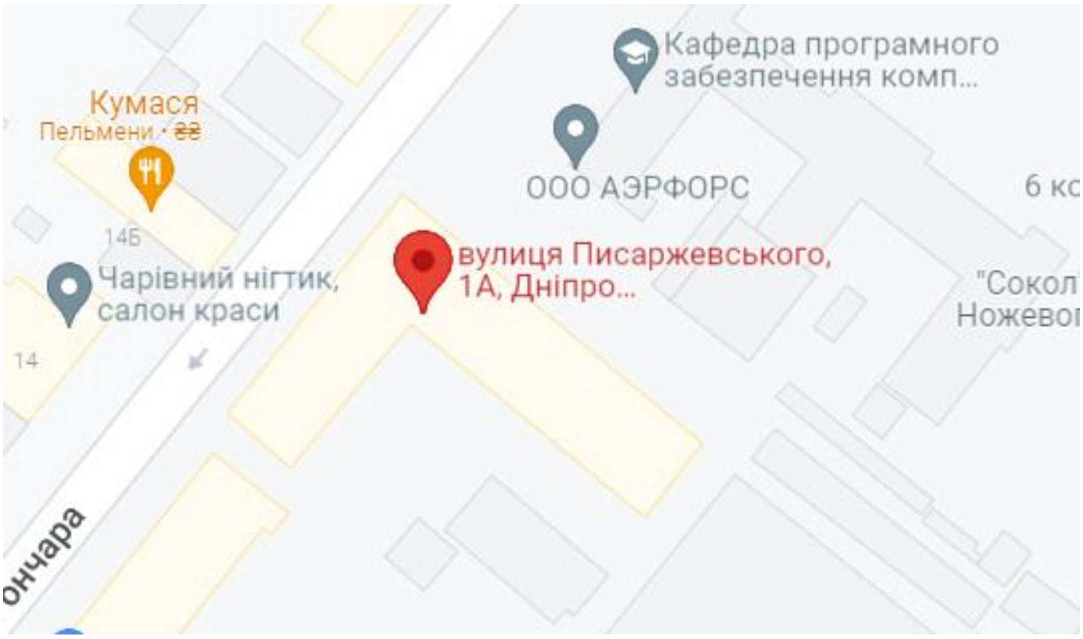
By clicking the ***Delivery Status*** button, the delivery status of each order item can be viewed, detailed by means of transport, and delivery of each item can be tracked by GPS coordinates.

Order product: **P265GH TC1 219.100x8.000 6000-6300** (Item # 22-007932-001)

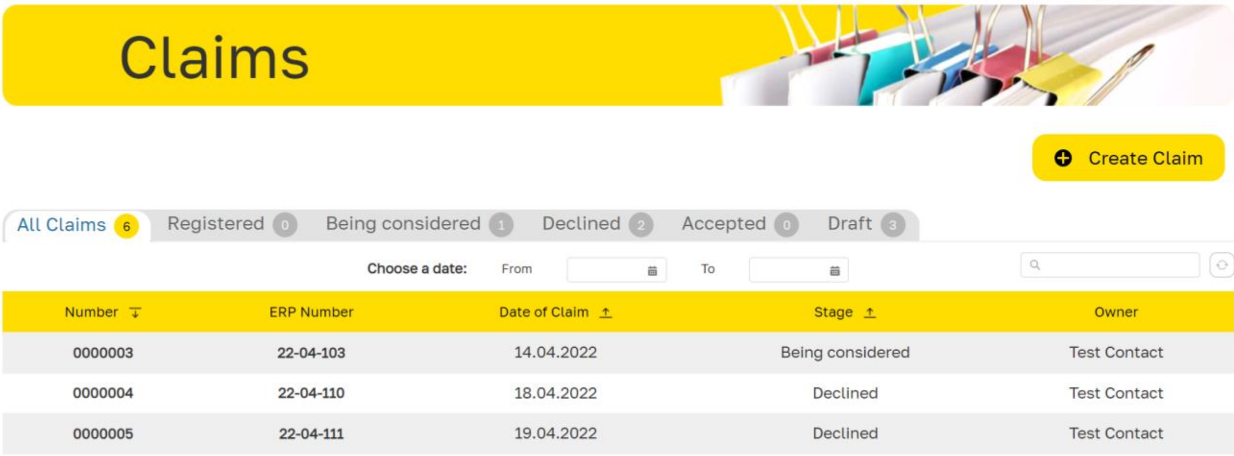
	Car #	Doc #	Date of ...	Certific...	Get Certificate	Qty (pcs)	Qty (t), ...	Qty (t), ...	Length, m	Date/Ti...	Country	Place	Status
1	AP3257EM/...	30864144	Nov 21, 2022	22B3042	22B3042	20.000	5.314	5.284	123.660	12.12.2022 ...	Bulgaria	бул. „Христо Бот...	Delivered
2	AE8283KP/...	30997069	Dec 8, 2022	22 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.



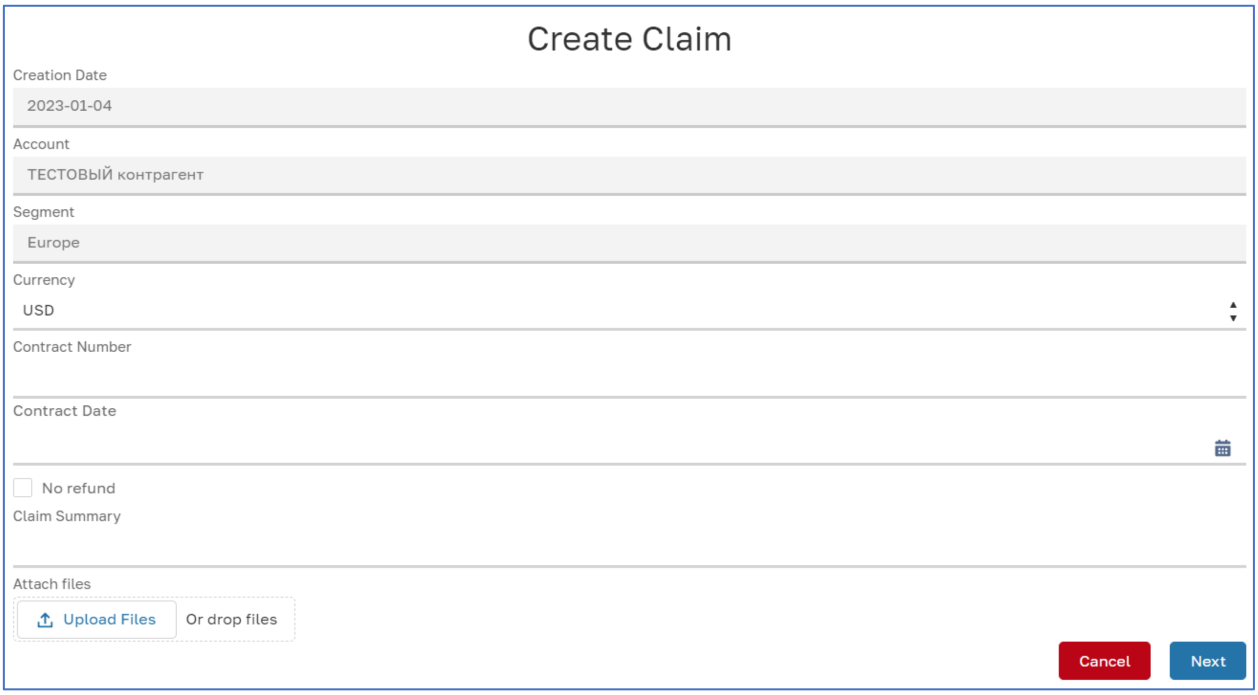
Claims – customer claims at various stages of fulfillment, with possibility of creating a new claim



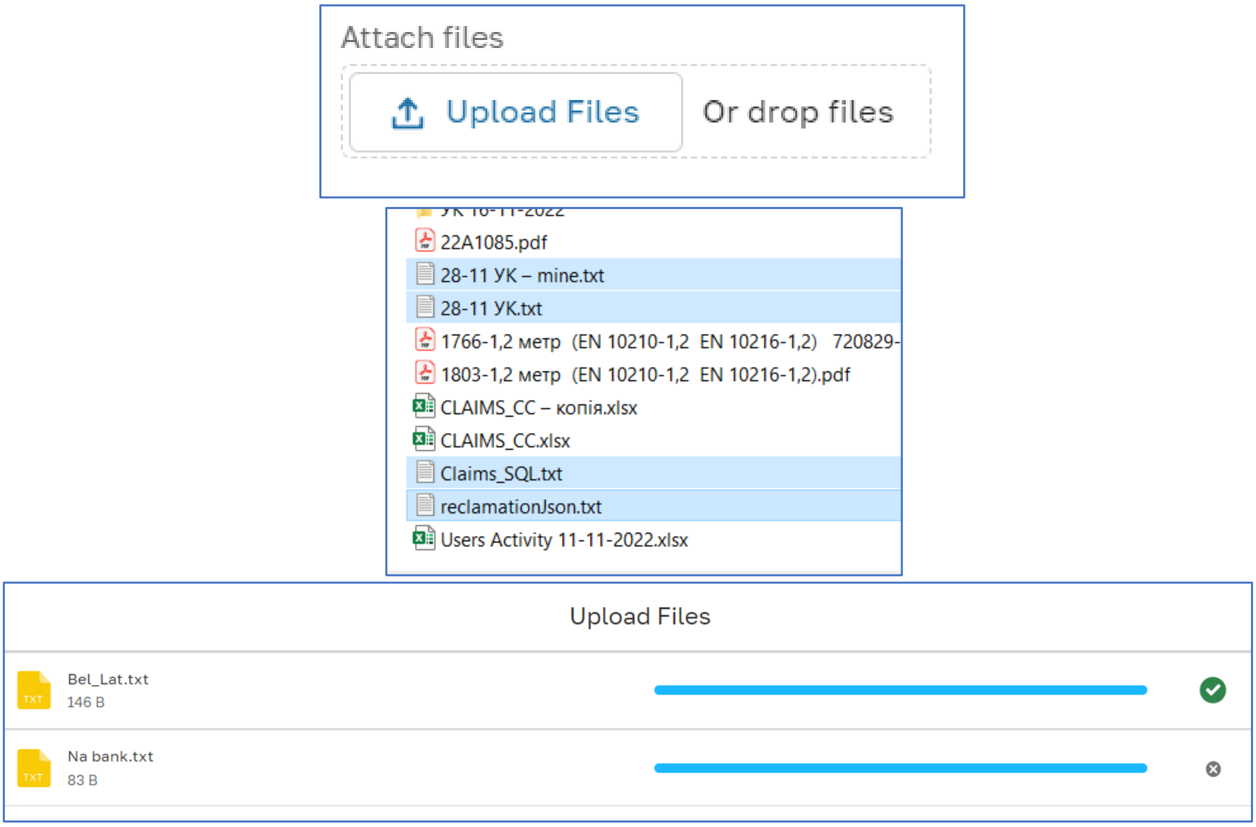
Claim creation

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

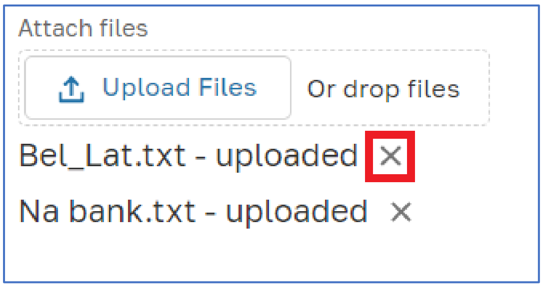
The following form opens:



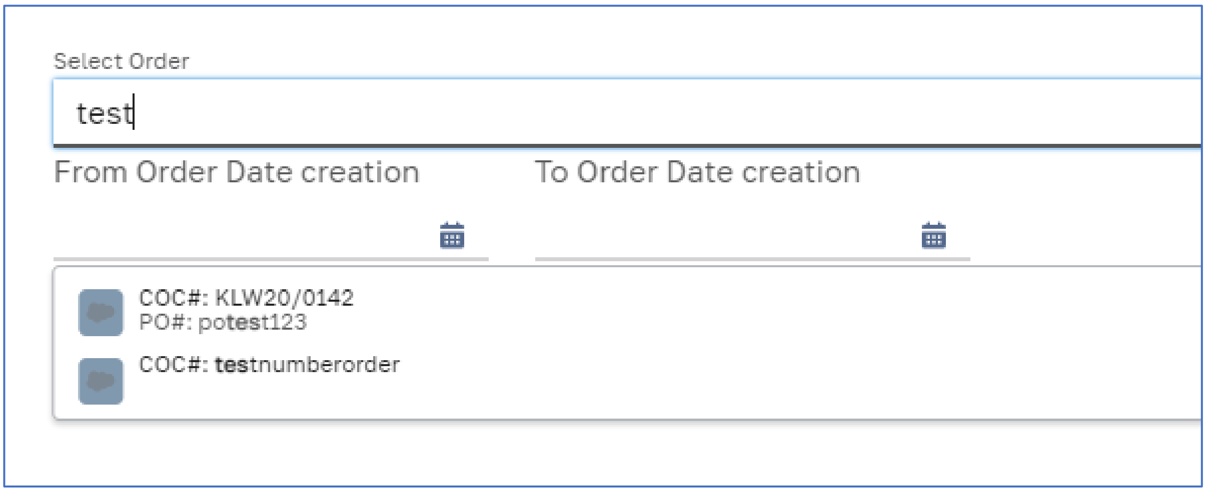
The ***Upload Files*** button allows you to select arbitrary files and attach them to the claim. It is possible to select a group of files at once.



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



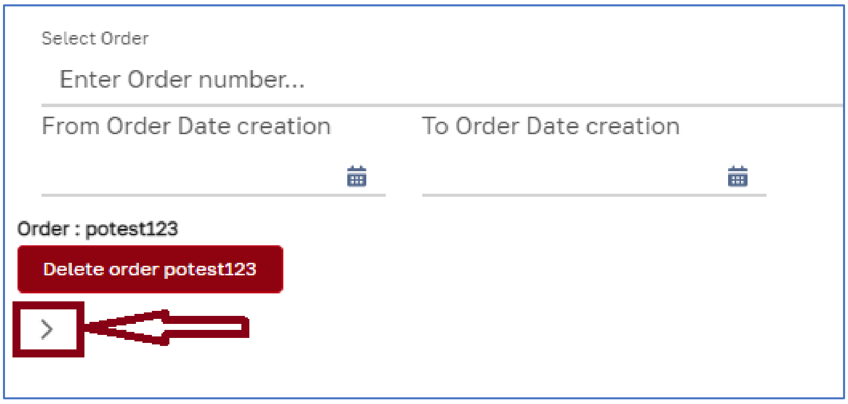
After clicking the ***Next*** button, the user gets to the form for selecting orders and adding products (order items) for which the user wants to file a claim. The products from different orders can be added to one claim.



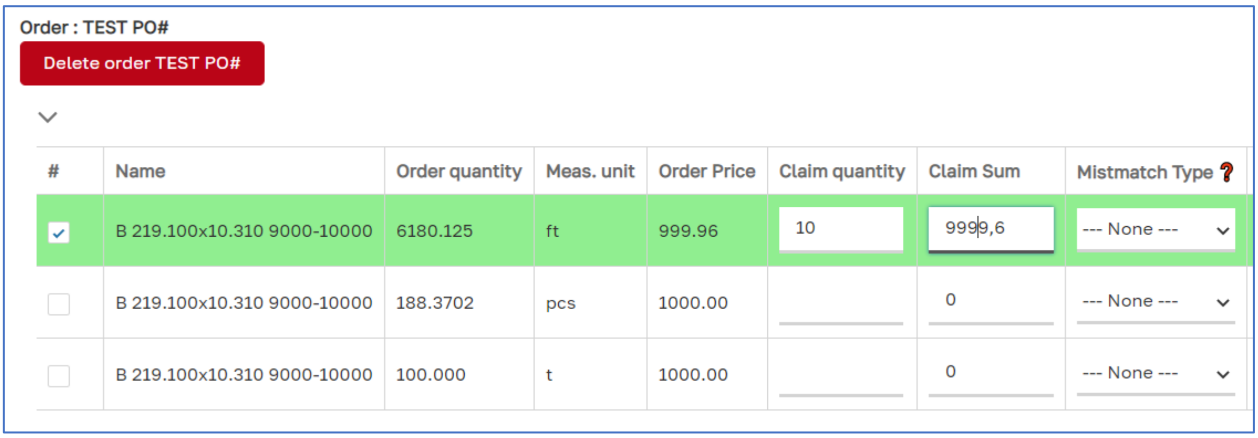
In the ***Select Order*** field, the order number is entered (one of three attributes: *ITE Number*, *Add. Number*, *SF Number*).

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.



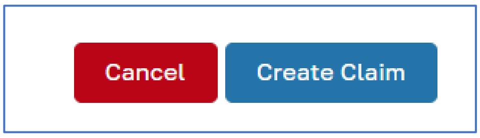
After this button is pressed, detailing of the selected order opens.



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

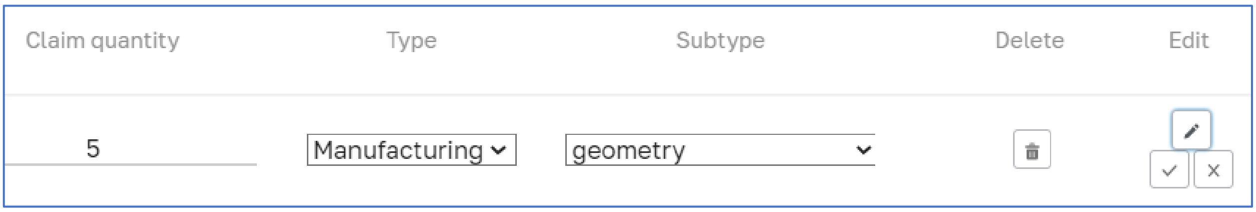
If another order is to be selected, the user repeats the steps for selecting the order and selecting the product items.

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.



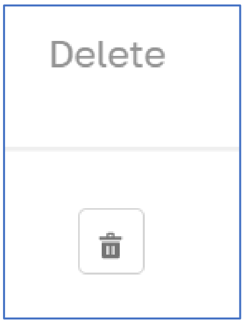
When the claim created by you is in the Draft status, you can adjust it – the number of products to be claimed, the claim type / subtype can be changed. To do this, open the detailing of the claim and click the ***Edit*** button.

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



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

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

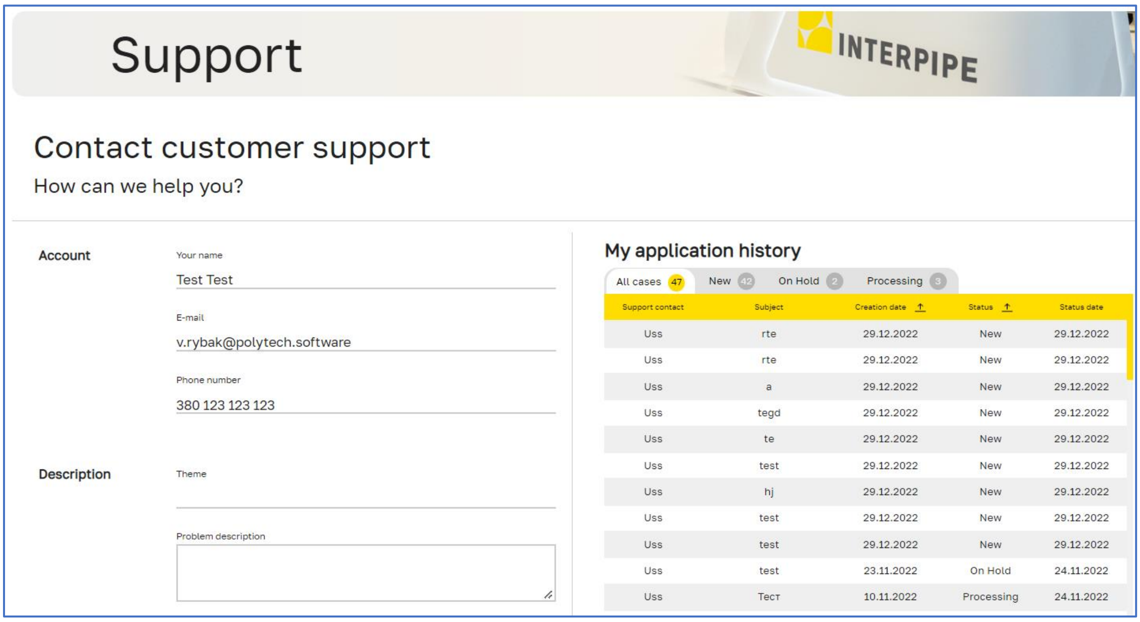


It is also possible to delete the entire claim if it is in the Draft status.

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

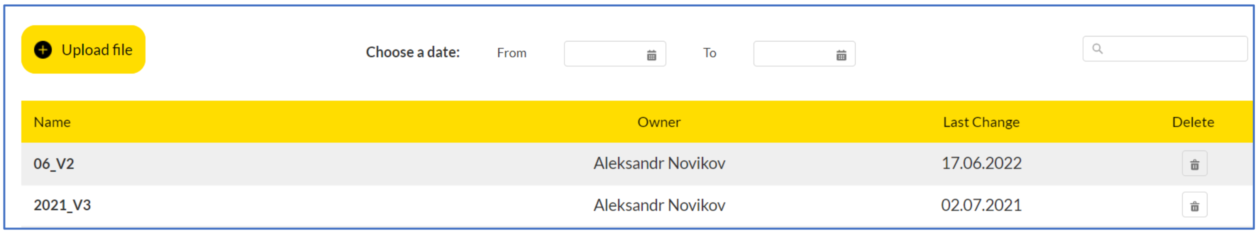
In this case, the claim gets to the system database, is registered there, and assigned with a registration number and the "Registered" status. After that, any adjustment of the claim becomes impossible.

Customer Support – go to the customer support contact form



Support contact	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	Тест	10.11.2022	Processing	24.11.2022

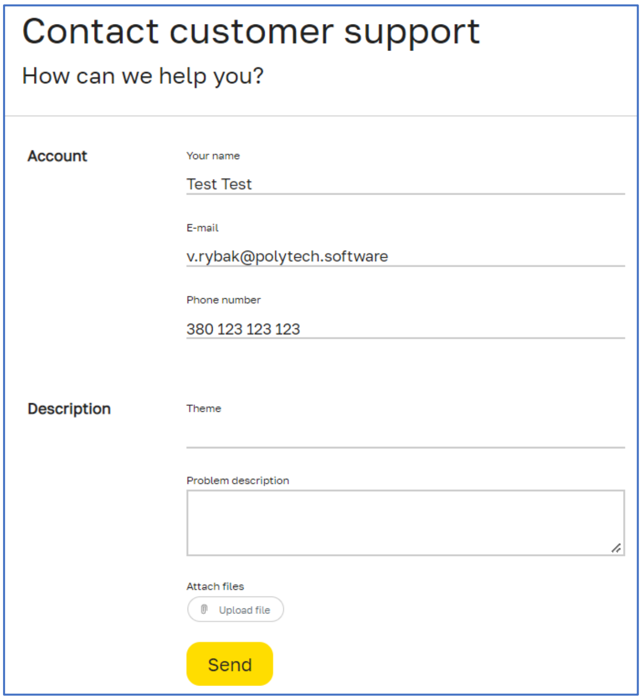
Files – go to the list of files uploaded to the portal by the customer



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

Communication with the support service

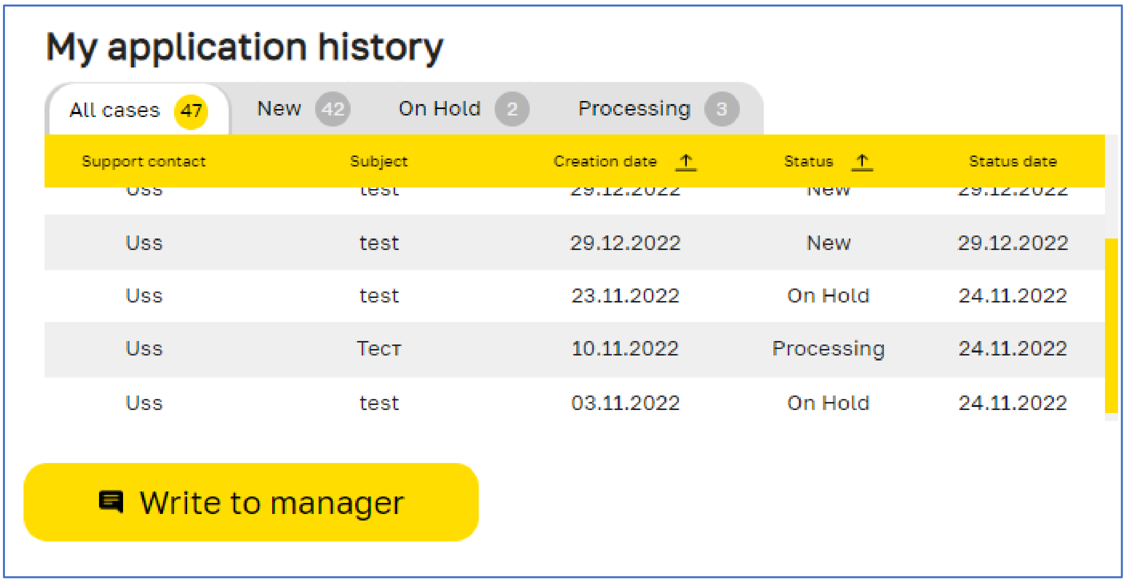
You can write an e-mail to customer support using the ***Support*** item in the main menu. If you select this menu item, a feedback form for communicating with the support service will appear.

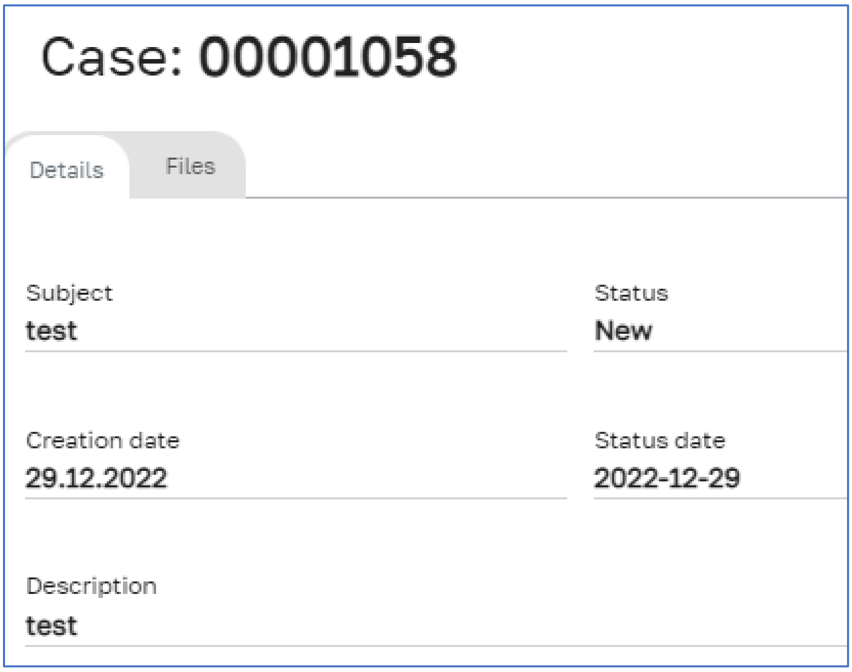


You can select the contact person you would like to communicate, and also attach any additional files (if necessary). By default, the message is sent to the seller assigned to your company.

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.



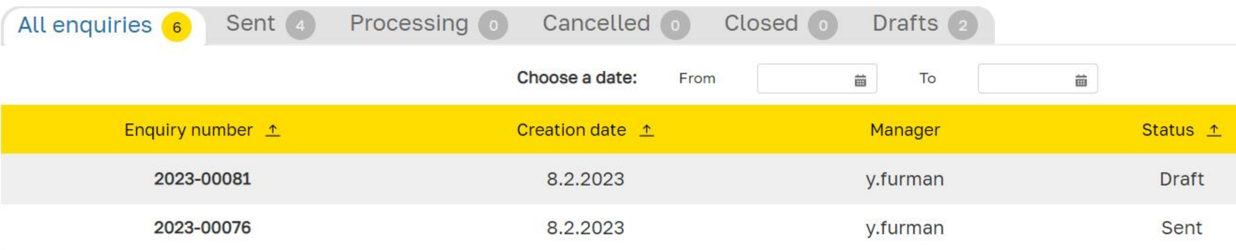


You can also write an e-mail to the seller or another employee by clicking the ***Write to manager*** button. In this case, the window of your default e-mail client will open, and the e-mail of the seller assigned to your company will be inserted in the ***Send to*** field.

Preliminary orders (Enquiries)

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

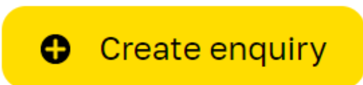
After entering the *"Enquiries"* section, you can see all your product purchase enquiries with their respective statuses.



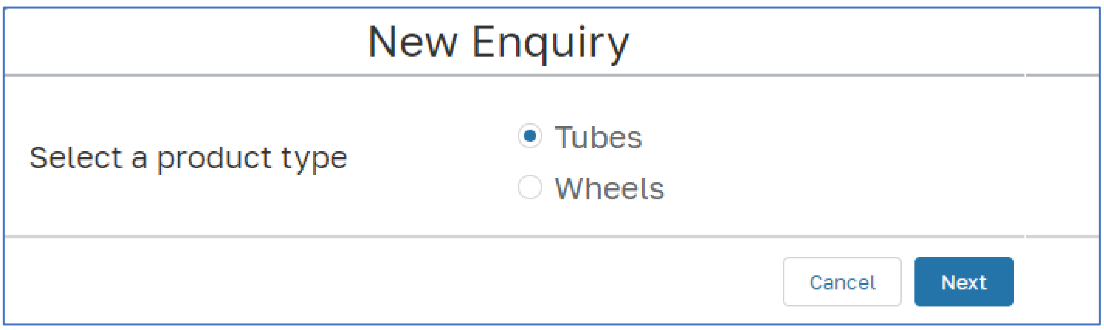
Enquiries have the following statuses:

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.

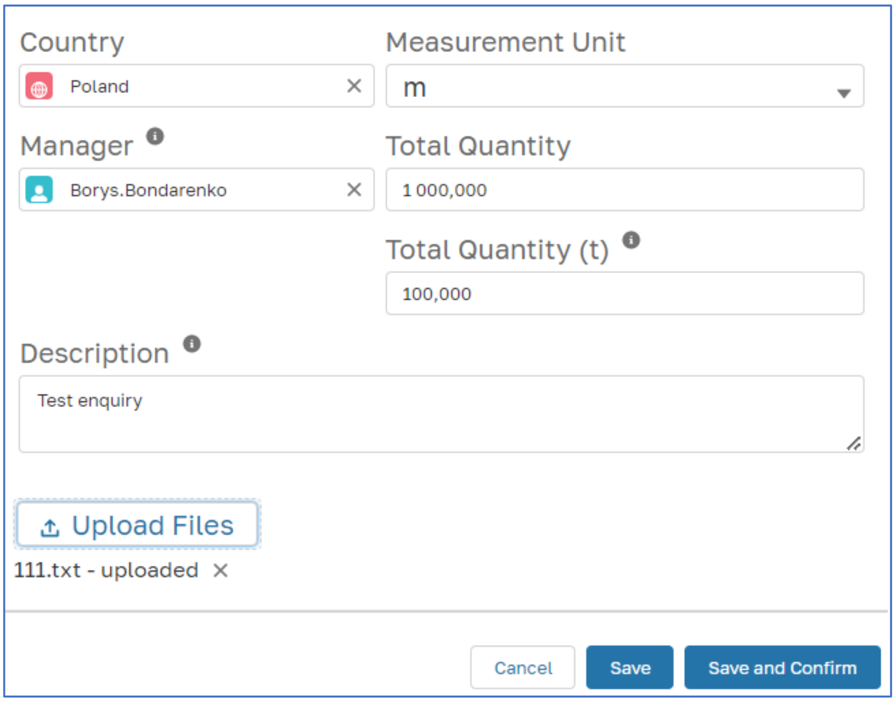


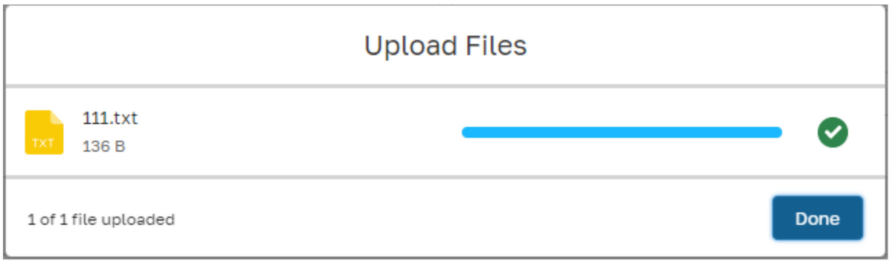
The next step is to choose the type of products to be ordered.



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.



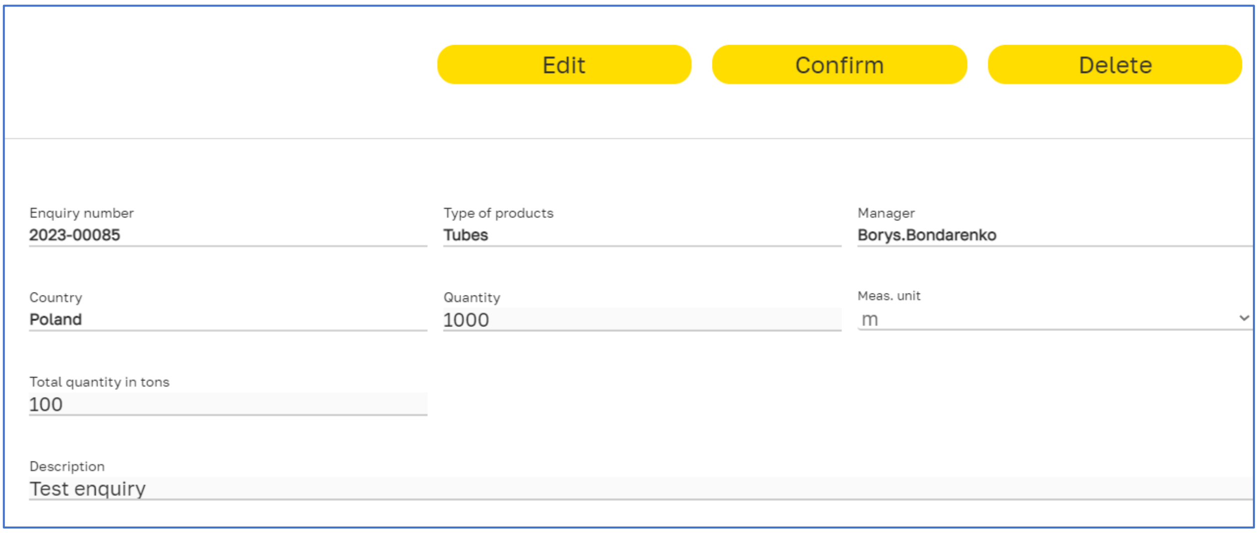


Once the data has been entered, you can press the *"Save"* or *"Save and Confirm"* button.

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

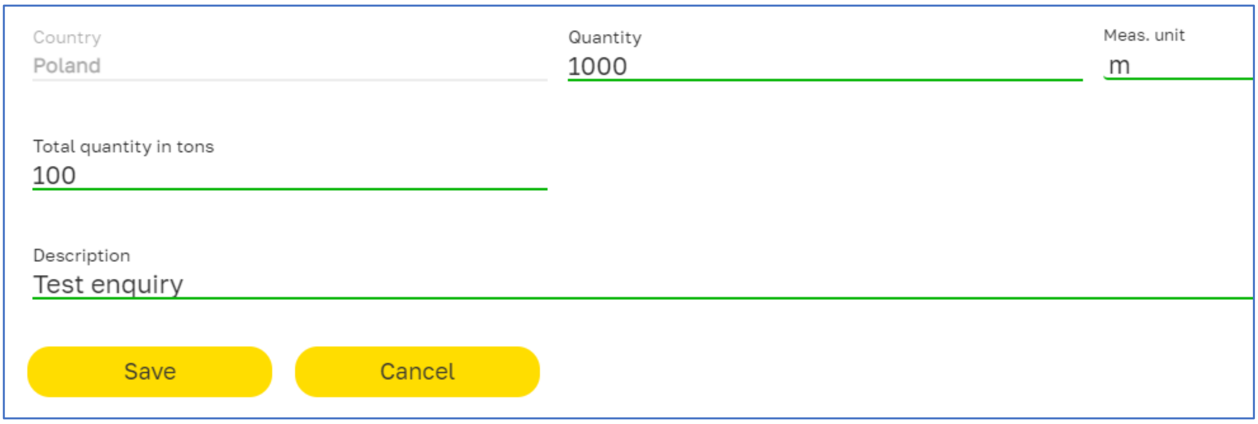
If you are sure that the enquiry drawing up is finished and no further editing is required, you can click the *"Save and Confirm"* button. This button allows you to save the enquiry as a final document in the ***Sent*** status and immediately sends it to the manager.

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.



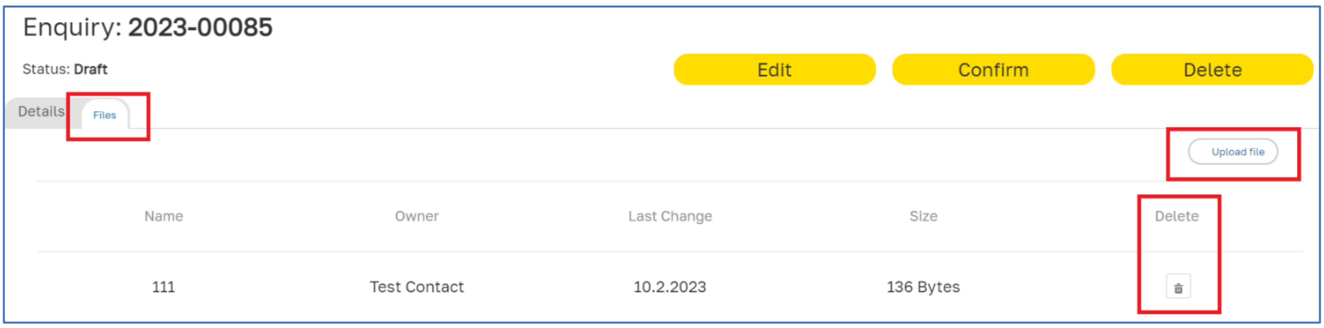
In the ***Draft*** document status, the *"Edit"* and *"Delete"* buttons are also available, which allow you to edit or delete the document, respectively.

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.



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.

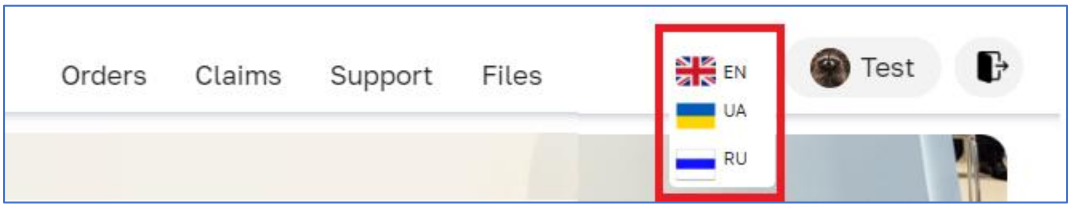


If you want to delete the document, click the *"Delete"* button. After confirming the operation, the enquiry will be deleted.

Multiple languages

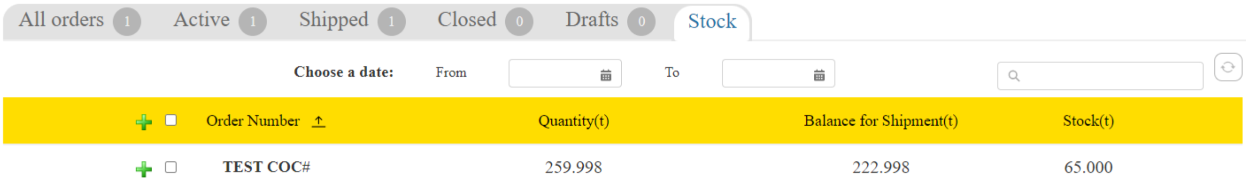
Customer Community portal of INTERPIPE supports three languages – English, Ukrainian and Russian.

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

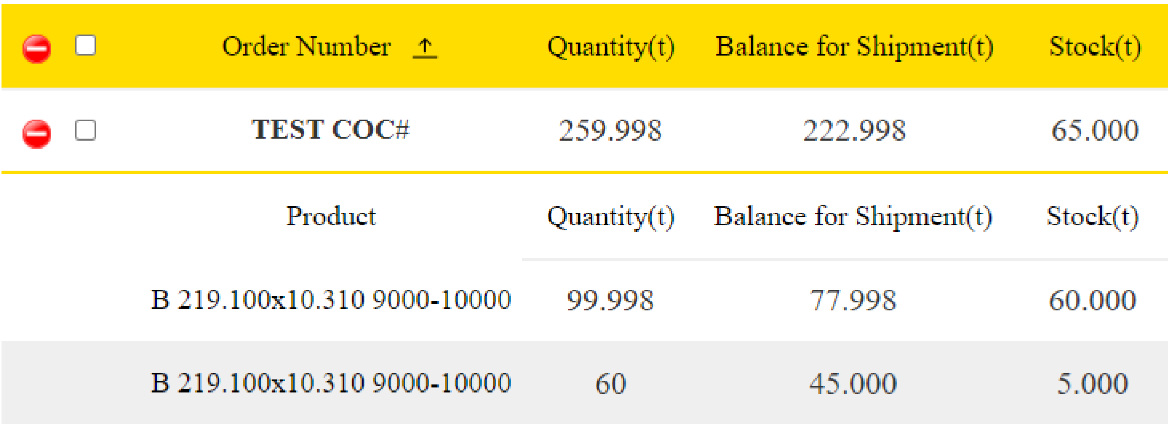
The **"Stock"** tab shows the list material ready for shipment.



Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
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.



Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
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.

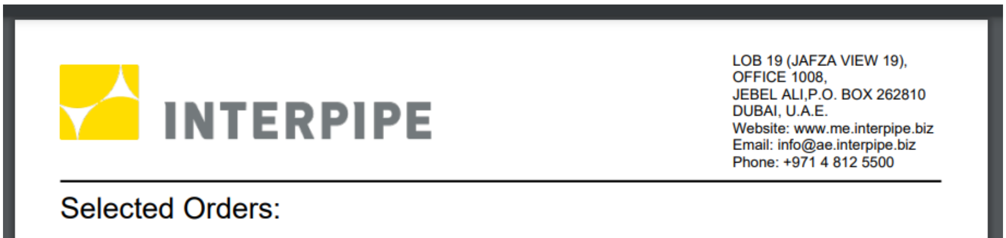
To pull up the detailed part, you need to click on the "minus" button – either in the line of a selected order (only this items will be pulled up), or in the table header (the items of all pulled-down orders will be pulled up).

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.

		Order Number	Quantity(t)	Balance for Shipment(t)	Stock(t)
		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.

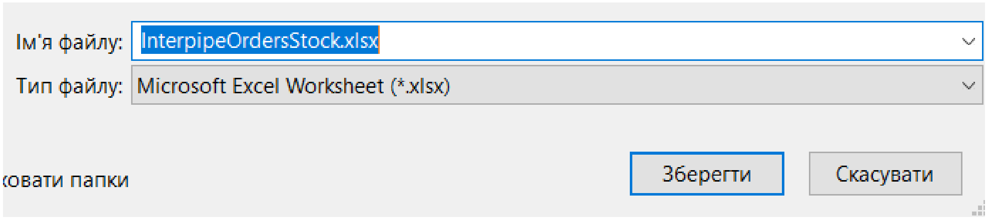


Selected Orders:

Order Number	Quantity(t)	Balance For Shipment	Stock
TEST COC#	259.998	222.998	65.000

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:



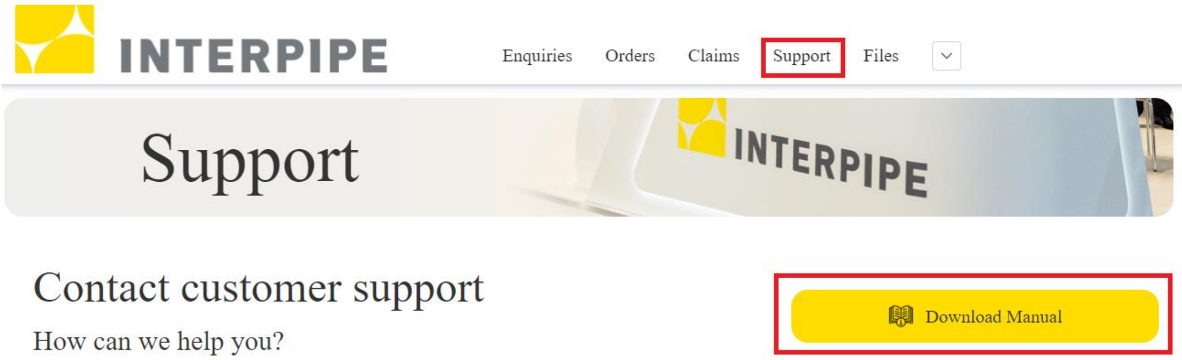
You need to save this file to the disk of your computer.

The generated Excel file will have the following structure:

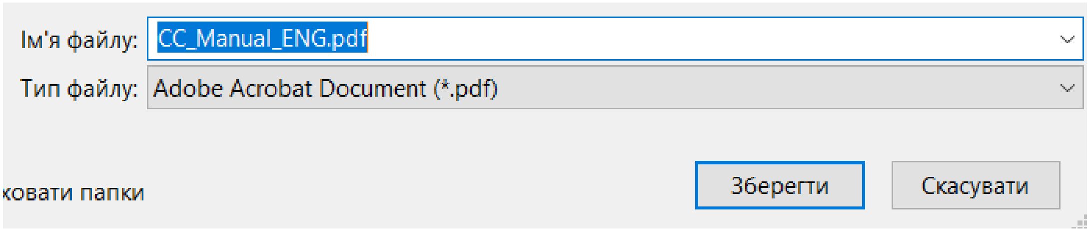
A	B	C	D	E
Order Number	Product Name	Quantity (t)	Balance For Shipment	Stock
TEST COC#	B 219.100x10.310 9000-10000	99,998	77.998	60.000
TEST COC#	B 219.100x10.310 9000-10000	60	45.000	5.000

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

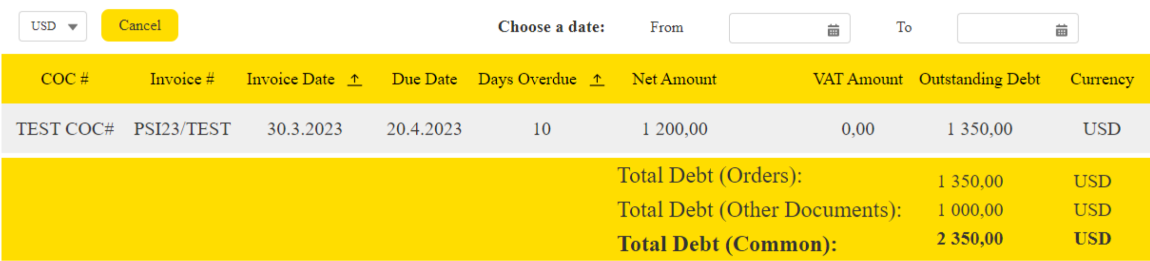
The **"Financial Balance"** tab shows the state of your company's financial balance with INTERPIPE.

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:

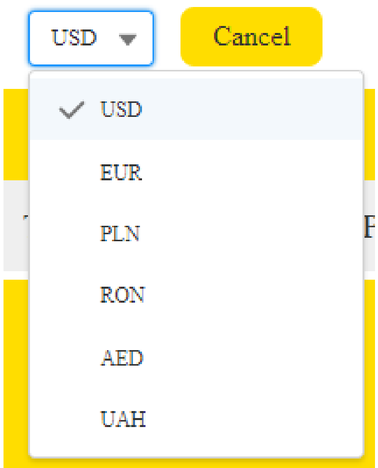
- The line **"Total Debt (Orders)"** shows a total of all calculations ***that are tied to orders.***
- The line **"Total Debt (Other Documents)"** shows a total of all calculations ***that are not tied to certain orders*** (credit notes, etc.).
- The line **"Total Debt (Common)"** shows a grand total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



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