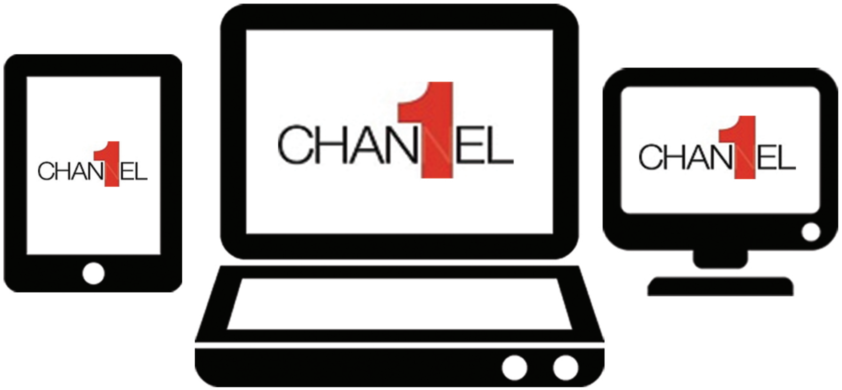
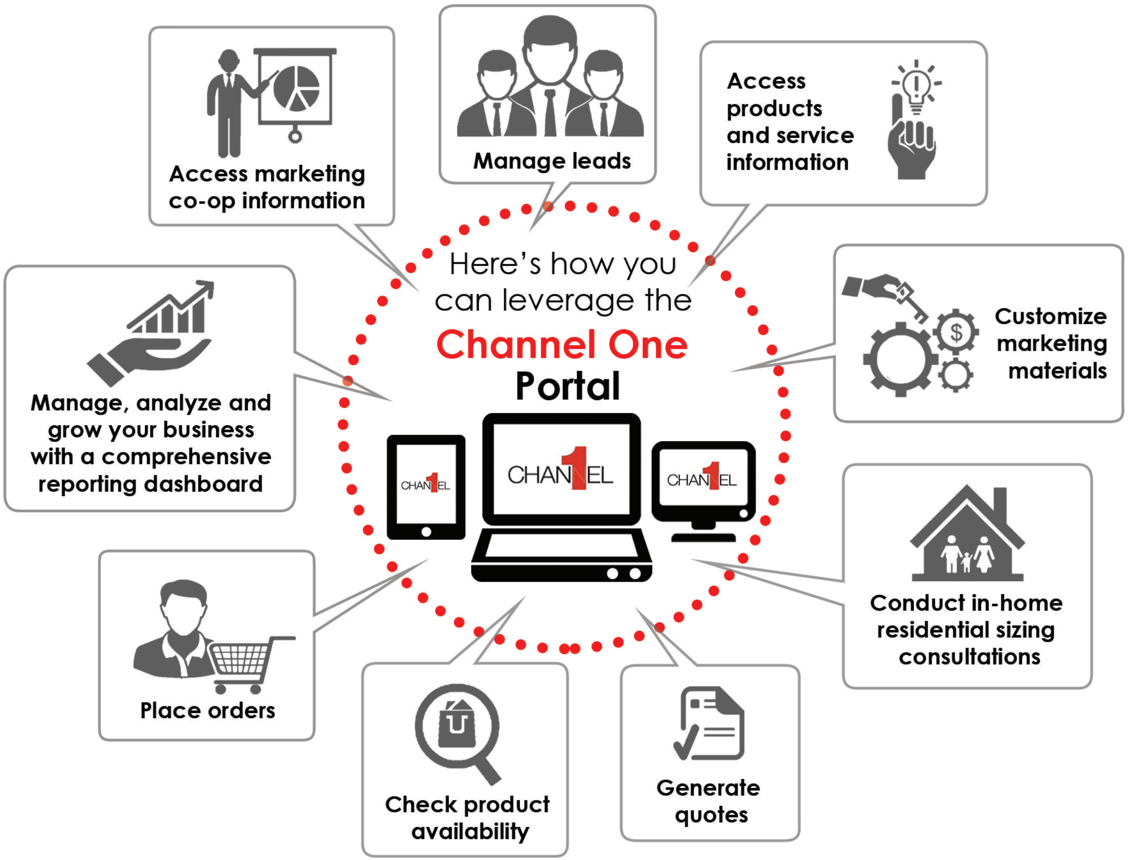
Channel One Portal

Quick Reference Guide



Channel One Portal

Quick Reference Guide: Distributor



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Distributor Desktop

Quick Reference Guide

1

Getting Started

Getting Started

Site Navigation

Purpose: In this Quick Reference Guide, you will learn how to navigate through the Channel One Portal.

1. Enter *www.channelone.cummins.com* – the Channel One Portal Login Page appears.

2. Enter your **Username** and **Password** in the respective fields.

3. Click Submit - the Channel One Portal homepage appears.

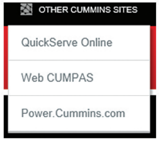
   Note: The news carousel at the top of the page contains banners of important news related to product, pricing announcements, and marketing campaigns. You can get more information about these news by clicking Read More .

4. Select Profile from the *My Account* drop-down list – your profile page appears.

5. Click SITE HELP - a drop-down list appears with links to *FAQs* and *Request Help*.

   Note: You will also find a *Getting Started* link containing tips on how to use the portal.

6. Click OTHER CUMMINS SITES - a list of the following links to other sites appears:

7. Click Manage My Dealers to view the details of your dealers – the *Manage My Dealers page appears.*

   Note: On this page, you can view details such as **Main Contact**, **Location**, **Billing Address**, and **Shipping Address** of the dealers under your distributorship. You can also access **Recruiting and Development** documents, **Cummins Forms and Policies**, **Dealership Agreements**, and **Dealership Templates** from this page.

8. Click Product Information to view technical documents and sales materials.

9. Click Service to view applications and documents related to service

   Note: Here, you will find links to service manuals, service tools, parts and accessories, product installation, registration, and warranty.

10. Click Sales to access sales related functionalities such as the Gen Sizing Tool, Leads, Orders, Pricing, and Sales Reports.

11. Click Training to view training information related to your dealers' certification levels and available training resources.

12. Click Marketing to access the *Co-op Budget page* and available marketing materials.

    Note: The *Co-op Budget page* will show the Co Op Marketing funds that your dealers have spent and/or still have available.

Getting Started

13. Click CHANNEL 1 to navigate back to the Channel One Portal homepage.

14. The **Factory and Distributor News** and **Distributor Contacts** links will be available on the left panel on the homepage.

15. You will find quick access links to the GenSizing tool on the right-hand panel on the homepage.

16. At the center of the homepage, you will find the quick access links to:

    - **Manage My Dealer's Leads**
    - **Place and Track Orders**
    - **Manage Pricing**

17. Below the content area, you will see links to **All News**, **News Archive**, **FAQ**, **Getting Started**, **Contact Listing**, and **Submit Feedback**.

18. You will also find the links to the **Privacy Policy**, **Terms and Conditions**, and **Site Map** at the bottom of the page.

2
Lead Management

Lead Management

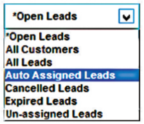
Assign Leads to Dealers

Purpose: In this Quick Reference Guide, you will be able to assign a new or unassigned lead, or reassign an auto-assigned lead to a dealer.

1. Click **Sales** - the *Sales* drop-down list appears.
2. Click **Leads and Orders** - the *Leads and Orders page* appears.
3. Click **Manage Leads >** - the *Leads List* appears.

   Note: By default, you can see the **My Leads** view. This view only displays existing factory and distributor sourced leads allocated to your dealers. If you are a Distributor PCBL, you can view both **My Leads** and **My Team's Leads** via the drop-down list.

4. Click *Open Leads – the leads list filter drop-down appears

   .

   Note: The drop-down list is an easy way to sort the leads displayed.

5. Click the **Dealer** field of the respective lead.

   Note: These steps apply to any leads that are eligible for assignment or reassignment.

6. Click the search icon - the *Pick Channel Partner* dialog box appears.

   Note: The box displays the available channel partners under your distributorship. You can see the *Dealer* name, *Primary Sales Rep Name*, *Address*, and *Zipcode* of the channel partners.

7. Click the appropriate dealer name.
8. Click **OK** .

   Note: You can assign a dealer only if the **Status** field of the lead is showing *New*, *Expired*, or *Unassigned*.

9. If a lead is re-assigned to a different dealer, the lead disappears from the **My Leads list**. However, if you are a Distributor PCBL, you can still view the lead from the **My Team's Leads** view.

   Once you reassign a lead to a dealer, the dealer principal of that particular dealership is assigned to that lead by default. The dealer principal may then assign the lead to one of the sales representatives.

Lead Management

Create and Work on a Lead

Purpose: In this Quick Reference Guide you will learn about the features present in the Channel One Portal that enable distributors to create and work on a lead. It is important to note that as a distributor, you will only have the ability to edit leads sourced by the factory and your distributorship.

1. Click **Sales** - the *Sales* drop-down list appears.
2. From the *Sales* drop-down list, select **Leads and Orders** - the *Leads and Orders page* appears.
3. Click Manage Leads > - the *Leads List* section under the *Accounts/Leads* tab appears.

   Note: By default, you can see the *My Leads* view. This view only displays existing factory and distributor sourced leads allocated to your dealers. Based on role and access users can view either *My Leads* or both *My Leads* and *My Team's Leads*, via the drop-down list.
4. Click Create a New Lead. You have to access the *My Leads* view to create a new lead.

   Note: You can enter the required details in the given fields to update information about a lead.

   The mandatory fields are:

   i. **First Name**

   ii. **Last Name**

   iii. Either **Primary Phone** # (no.) or **Email**

   The **Reason** field is mandatory if at any point the lead status is updated to *Lost*.
5. In the lead's **Last Name** field, click the required hyperlink. This will take you to the lead information section.
6. Click the **Probability** drop-down arrow and select a reasonable value.

   Note: The **Probability** field indicates your best estimate of the probability of converting the lead to a customer and is not a required field.
7. From the **Status** drop-down list, select the correct status.

   Note: Executing and completing certain activities in the portal such as scheduling a consultation using the activities function will automatically update the lead status.
8. Click - some additional fields are displayed.
9. Click again - the additional fields are now hidden.
10. Below the lead's detail information section, you'll notice the following subtabs:

    Contacts | **Activities** | **Email Communication**
11. The list under the *Activities* subtab enables tracking of your activities such as phone calls, emails, and in-home consultations. All tasks related to lead conversion can be logged and tracked in the **Activities** section.

    Utilization of the *Activities* section is not required. However you may find this functionality beneficial.
12. To create a new activity, click **Activities** .
13. In the *Activities* section, click New .
14. Click the **Type** drop-down arrow and select an appropriate activity.

Lead Management

15. From the *Status* drop-down list, select the appropriate status.

    Note: If the *Activities* status is set to *Closed*, the lead status is auto-updated.

16. Many of your leads will be individual residential customers. However, the system also enables you to add multiple contacts under a single lead to help manage your light commercial and small business customers. You can add additional contact details for a small business lead and select a primary contact from the available list.

    Once you are on the lead details page, the *Contacts* subtab is selected by default.

17. In the *Activities* section, click Contacts .

18. To add new contact details of a lead, click New .

19. To add multiple contact details, you can click New and enter the required details in the row that is added.

20. By default, the *Primary* checkbox is selected for the first entry in the contact details fields.

    Note: If you do not want a contact detail to be the primary contact, you can clear the *Primary* checkbox.

21. A lead is considered closed if its **Status** is updated to **Won**, **Lost**, **Cancelled**, or **Expired**. You can either manually update the status, or auto-update it via completion of activities.

    If the **Status** is updated to **Lost** or **Cancelled**, updating the **Reason** field is mandatory.

Lead Management

Import a List of Leads

Purpose: In this Quick Reference Guide you will learn about the features present in the Channel One Portal that enable distributors to import leads.

1. You will find the **Sales** tab on the red toolbar of the homepage.

2. To navigate to the leads section, click the **Sales** tab.

   Sales

3. To view the list of leads created by or assigned to you, select the **Leads and Orders** list item.

   Leads and Orders

4. Under the **Leads** column, click **Manage Leads**.

   Manage Leads >

5. The **Leads List** section under the **Accounts/Leads** tab appears.

6. To import leads, click **Lead Import**.

   Lead Import

7. You can now see the **Import** dialog box. This dialog box allows you to upload the Excel document where you have saved the lead details. It is important that you utilize the provided lead template CSV file and that you don't modify the structure of this template (only the lead contact information should be added). Update this CSV file with the required contact details and save the file locally as a CSV file.

8. To locate the document where the leads details are saved, click **Browse**...

   Browse...

9. Navigate to and select the file you updated with your leads and saved locally.

   Lead Import - Template_MTB
   Microsoft Excel Comma Separate...
   1.00 KB

10. To upload the file to the **Input File** field, click **Open**.

    Open

11. If you want to import a CSV file, select the **Comma Separated Text File** radio button.

    Always select the **Auto Mapping** radio button so that the portal can automatically map the CSV fields with the portal fields.

    Finally, in the **Conflict Resolution** section, you can reject an import record, overwrite an existing record with the new import record, or create a new record.

    We recommend you utilize the create a new record option.

12. To proceed with importing the leads, click **Next**.

    Next

13. You can now see the **Import** dialog box. This dialog box allows you to compare how these fields are mapped. If you have selected **Automapping**, the portal automatically maps the common fields between the two. You may also update the mapping - though this is not required or recommended.

Lead Management

14. To ensure mapping between the two fields, click **Update Mapping**.

15. To proceed, click **Next**.

16. The **Import** dialog box shows that the import has completed successfully.

It shows the number of records successfully imported and failed.

You can view these details by clicking the **View Log** link.

17. To return to the **Leads List**, click **OK**.

18. Notice that the names of all the leads you have just imported now appear in the **Leads List**.

4

Ordering

Ordering

Place an Order on Behalf of a Dealer

Purpose: In this Quick Reference Guide, you will learn how to place an order on behalf of a dealer, check inventories, view product catalogs, generate order summaries, and understand system generated email notifications

1. Click Sales - the *Sales* drop-down opens.
2. Click Leads and Orders - the *Leads* and *Orders* page appears.
3. Click Place, View and Track Orders - the list of orders appears.
4. Click Place an Order - a new order number is generated.

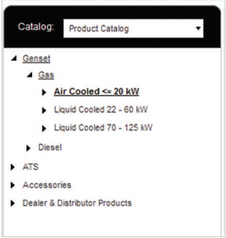
   Note: You need to add the dealer details in the new row, or else you will not be allowed to proceed with the transaction. This is how you assign the dealer for which you will place the order.

5. Click in the required row – the *Pick Dealer* dialog box appears.

   Note: The *Pick Dealer* dialog box displays a list of dealers with their addresses.

6. Select the dealer for which you would like to place the order.
7. Click OK - the dealer's name appears in the row.
8. Click the newly generated order number hyperlink – the *Step 1: Shop Products* subtab appears.

Note: You can use the *Catalog* section on your left to search for products. The catalog contains categories and subcategories to make your search quick and easy. Once you have selected a genset you can continue utilizing the product catalog sort shown below or you can utilize the ordering steps to order compatible products.



9. Click the required product panel to select a product – the product is selected.
10. Click Check Inventory - a confirmation message appears.

    Note: If the product is available in distributor inventory, a confirmation message will appear and the system will provide you with an estimate of the number of days required to ship the product. If the product is not available in distributor inventory, the system will then check factory inventory. If the product is available in factory inventory, the system will provide you with an estimate of the number of days required to ship the product. If the product is not available with the distributor or at the factory, the dealer portal will provide lead time and shipping time estimates.

Ordering

11. Click OK .

    Note: If you wish to add the product without viewing its specification sheet, you may directly enter the required quantity in the **Quantity** field and click Add Item .

12. Click the hyperlink on the product name to view additional product details – the product details section appears.

    Note: From the detailed product information screen, you have the opportunity to open the spec sheet for the Genset or ATS product that you currently have selected by clicking SpecSheet .

13. Enter the required number in Quantity:

14. Click Add Item - the product is added to the *Order Cart* on your right.

    Note: If required, you may remove a product from the cart by highlighting the product in the cart and clicking Remove

15. Click Step 2: Add Compatible ATS - a list of compatible ATS appears.

    Note: This list only contains ATS that are compatible with the selected genset.

16. Click Add Selected Item - the ATS appears in the Order Cart.

17. Click Step 3: Add Compatible Accessories - a list of compatible accessories appears.

18. Click Add Selected Item .

19. Click Step 4: Add Distributor Products - a list of distributor specific products appears.

20. Click Add Selected Item .

21. Click Step 5: View Order and Checkout - the order details section appears.

    Note: Here you can review your order.

22. Click Submit Order - a confirmation message appears.

    Note: If your dealer's profile is configured to receive order status email notifications, your dealer will receive a system generated email notification confirming the order submission. The email will be sent to the dealer's registered email address.

23. Click OK .

24. Click - the *Run Report* dialog box appears.

    Note: Here, you can add a customized name to the report, choose an output type, and identify the report locale from the respective fields.

25. Click Submit .

26. Click My Reports.

    Note: The report summary you generated and renamed just now will appear in the list of report names.

27. Click the required report hyperlink – the order summary report opens in the chosen format.

Ordering

Review a Dealer Order

Purpose: In this Quick Reference Guide, you will learn how to review a submitted order.

1. Click Sales - the *Sales* drop-down opens.
2. Click Leads and Orders - the *Leads* and *Orders* page appears.
3. Click Place, View and Track Orders - the list of orders appears.
4. Click the required order hyperlink– *the Step 1: Shop Products* page appears. You cannot add products when you are reviewing a submitted order.

   Note: You can verify if the status of an order is Submitted from the **Status** field. You cannot modify any of the displayed fields of a submitted order.

5. Click Step 5: View Order and Checkout - the order summary page appears. Review your dealer order on this page.

   Note: You can view your order's status from this page. Once an order has been **submitted**, the status automatically changes to Submitted. The subsequent status updates are made on the basis of your actions. For example, if you approve the order and ship it, the status gets updated to **Shipped**.

6. To ship the order, you will have to specify the **Preferred Shipping Method** and **Preferred Shipping Carrier**. If the dealer has provided their preferred shipping method and carrier, the dealer's preferences will appear by default. You may override these preferences with your own.
7. Click Approve to approve the order- the status of the order changes.

   Note: You may also reject an order in the same manner by clicking Reject. You may enter appropriate comments in the **Comments** field. For instance, you may mention your reasons for rejecting an order.

8. When you ship an order, you will have to update the tracking details in the Portal.
9. Click Track Order to update the tracking details – the *Track Order* page appears.
10. Click New and update the **Tracking #**, **Shipping Method**, **Carrier**, and **Comments** fields.

    Note: These details will then be available to your dealer.

5

Reports

Reports

Dashboard Reports

Purpose: In this Quick Reference Guide, you will learn how to access various reports in the Channel One Portal.

1. Click **Sales** - the *Sales* drop-down list appears.
2. Click **Leads, Quotes and Orders** - the *Leads, Quotes and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click **My Dashboard** - various reports appear as subtabs.

   Dealer YTD Sales Revenue Report | Lead Conversion Performance | Products Ordered | Order Details

   Lead Details Report | Lead Aging Report | Orders Consolidated Sum Report

   Note: You can click any of the subtabs to view the report.
5. **Note:** You can roll your mouse cursor over the graph to view additional details.
6. Click Graph and select an appropriate option from the drop-down list.

   Note: Every report in the Sales application allows you to choose from the two available interfaces: graph and table.
7. Click [icon] to print the report – the *Menu* drop-down list appears.
8. Roll your mouse cursor on Print - two options are displayed

   Printable PDF

   Printable HTML

   Note: You can select the appropriate option.
9. A printable report opens in a different tab. You can click My Dashboard to view the *Reports* section again.
10. Click [icon] to export the report to MS Excel.
11. Roll your mouse cursor on Export to Excel - two options are displayed

    Export Current Page

    Export Entire Dashboard

    Note: You can select the appropriate option.
12. Click OK - the excel sheet is saved.
13. Click [icon] to change the parameters for a report.

    Note: Depending on the type of the report, the parameters will change.
14. Click Apply .
15. **Note:** Apart from these dealer specific reports, there are also performance reports available to distributors only. These reports will assist you in managing your dealer networks.
16. Click [icon] - the OBIEE application appears.
17. Click Dealer Portal Canned Reports -... the Dealer Portal Canned Reports page appears with various reports.

    Dealer Ranking Report | Quote to Business Conversion Rate | Extended Warranty Sold | Dealer Reward Level

    Note: The OBIEE application offers similar features such as printing, exporting, and customizing reports. From the dashboard of the OBIEE application, you can also view the dealer portal reports. These reports are the same as those you have seen in the *My Dashboard* tab of the Sales application.

6

Distributor Set Up

Distributor Set Up

Profile Management

Purpose: In this Quick Reference Guide, you will learn how to manage your profile.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads and Orders - the *Leads and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click Profiles - the *My Profiles* page opens.
5. Enter the URL for your terms and conditions in the **Terms and Conditions URL** field to add your dealer specific terms and conditions to the customer. To generate this URL send your terms and conditions to your factory Portal contact and they will provide the URL.
6. **Note:** Your phone number and primary address will be displayed by default. This is the phone number and address that you have entered into the World Wide Service Provider System. To edit this information you may edit WWSPS – the portal will update with any WWSPS updates overnight.
7. **Note:** The Channel One Portal will send you leads.
8. Select the Lead Email Notification: ☑ checkbox if you want to receive email notifications when new leads are available.
9. Enter the email ID in the **Lead Email Notification** field to specify an email address where you want to receive the lead email notification.

   Lead Notification Email Address: ms306@cummins.com

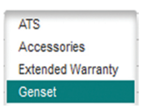
   Note: Only one lead notification field is available per dealer. This should be the principal or lead sales role who has the ability to re-assign leads within the dealership as they are received. You also have the option to add multiple email addresses in this field to copy multiple team members on notices. Simply enter multiple email addresses separated by a ";".
10. Select Order Email Notification: ☐ checkbox if you want to receive email notification for order status changes. The order notification email doesn't need to be specified as it is captured when access is granted and user roles and responsibilities are assigned.
11. **Note:** As a distributor, you can specify the shipping time required. The **Shipping Time** field denotes the time required to ship items to your dealer locations.
12. Click ▾ beside the **Shipping Time** field to specify the estimated shipping time.
13. Select the required number of days.
14. **Note:** As a distributor, you will not be allowed to specify the preferred shipping method, the preferred shipping carrier or the quote disclaimer as these are dealer fields. These fields enable your dealer to set their preferences in their profile. Ultimately the distributor determines shipping method and carrier - the dealer can only indicate their preference.

Product Management

Purpose: In this Quick Reference Guide, you will learn how to manage and add products to the Channel One Portal.

1. Click **Sales** - the *Sales* drop-down list appears.
2. Click **Leads and Orders** - the *Leads* and *Orders* page appears.
3. Click **Manage Leads >** or **Place, View and Track Orders** - the Sales application opens.
4. Click **Profiles** - the *My Profiles* page opens.
5. Click **New** to create a new product – a blank row appears in the *Products* section.
6. Enter a suitable product name in the respective **Name** field.
7. Enter the desired part number in the respective **Part #** field.
8. **Note:** You will be now be able to identify your product by its name and part number.
9. Click ▾ beside the *Type* drop-down list to specify the required product type.

   Note: A list of product types appears.



10. Select the required product type from the list items.

    Note: You will observe that the **Source** and **Orderable** fields are auto-populated. The **Source** field indicates if the product is a distributor product. The **Orderable** field indicates if the product can be ordered by the customer. Clearing the **Orderable** checkbox will hide this product from your dealers and restrict the product from being ordered. You may use this functionality to ensure that only products you wish to sell are available for dealer orders.
11. Enter a suitable description for the product in the **Description** field.

    Note: This is not a required field, however it is advisable to populate this field as it will enhance the appearance of dealer quotes.
12. Enter a suitable marketing name for the product in the **Marketing Name** field.

    Note: This is not a required field, however it is advisable to populate this field as it will enhance the appearance of dealer quotes.
13. You have now successfully created your product. However, additional steps are required to add this new product to your pricelist.
14. Click to ensure that the new product is displayed in the price list - the *Screens and Screens* and *Views* sections are displayed.

Distributor Set Up

15. Click Administration - Pricing - you will now be able to view your dealer pricing in the *Price List* section.

    Note: If you opt to utilize multiple price lists to deliver tiered pricing to your dealers, you will have the opportunity to set and manage multiple price lists here. The pricelist will appear as a hyperlink such as REM_11 Price ... . You can add your product to any of these pricelists.

16. Click the required quote price list hyperlink.

    Note: You will notice that the *product* you created is not visible under the Products subtab.

17. Click New to add the newly created product to the price list – the *Add Product* section appears.

    Note: You will have to locate and select the product you wish to add. You may utilize the search field to filter your product list to quickly find the product or products you wish to add.

18. Select the product(s) you would like to add to the price list and click Add .

    Note: The product that you created can now be seen in the product list.

19. Enter the appropriate cost of the product in the **Cost** field.

20. There are numerous ways to update the price that you will offer to dealers. You have the option to enter the appropriate cost markup percentage in the respective **% Cost Markup** field. Alternatively you can enter a profit margin percentage in the **% Profit Margin field**. Both of these options will update the list price once you input the percentages. Another option to update your pricing is the **Price Override** field. This field allows you to set the price of the product without the use of markup or profit margin %.

21. Enter the values in the required field – once the products are added to your price list you need to click Apply .

22. Click . Clear Cache

    The product(s) is successfully added to the price list.

    Note: Fields like **Part#**, **Factory Product**, and **Product Type** are auto-populated and cannot be edited. The **Part#** and the **Product Type** are the same that had been entered previously under the *Products* subtab.

Distributor Set Up

Price Management - Import Price List

Purpose: In this Quick Reference Guide, you will learn how to import a price list, which allows you to set the dealer price for each product. Remember, you can import a price list only after importing products in the Channel One Portal.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads and Orders - the *Leads and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click - the site map of the Sales application appears.
5. Click Price Lists - the *Price Lists* section appears.

   Note: You can see the information for existing price lists such as **Name**, **Price List Type**, **Currency**, and **Description.** The **Currency** and **Price List Type** fields are auto-populated whenever a new price list is created.
6. Click the respective price list name hyperlink – the price list detail information section appears.

   Note: Below the price list detail information section, you can see the *Products* subtab. This subtab displays the list of Cummins Power Generation products as well as distributor specific products. You can see the price you have decided to charge your dealers for each of these products. It will also show the cost at which you purchase them from Cummins Power Generation.
7. Click Factory Price List - the template downloads.

   Note: Please save the template as a CSV file in your computer. A CSV file can be opened in Microsoft Excel. The products that will be available to your dealers for ordering and quoting will be those which you have included in this list and have provided a price.

   To add your organization specific products to the *Price List Template*, you need to update the **Part #**, **Product Name**, and **Cost** columns in the file and save it as a CSV file in an accessible location on your computer.
8. **Note:** Before you add your product to the price list, it has to be set up in your product list in Profiles. For including your organization specific products in the import list, the product name and part number should match with the data in your product list in the Profiles tab. To learn how to add a product to the product list, please refer to the Quick Reference Guide on **Product Management**.
9. Please note that while creating a price list, use your distributor number followed by an underscore symbol as a prefix to the unique price list name.

   For example, you can name a price list as 03472_Pricing for Silver Dealers where 03472 is your distributor number and Pricing for Silver Dealers is a unique file name.

   Always remember that every price list name should be unique.
10. Update the CSV file with CPG products as well as your distributor specific products.

Distributor Set Up

11. Save the file and close it.

12. Click **Import** tab.

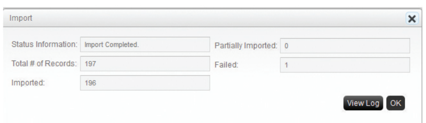
13. Click **Import** button – the *Import* dialog box opens.

14. Click **Browse...** and select price list you have created.

15. Click **Next** - the *Field Mappings* section appears.

    Note: In the *Field Mappings* section, you can see how the Channel One Portal has mapped the fields in the import file with the fields in the application. The system will allow you to manually update the mapping. However, this is not recommended or necessary.

16. Click **Next** - the Import confirmation message appears. This message will alert you to the success or failure of your import.



Note: You can click **View Log** for details.

17. Click **OK** .

    Note: If you wish, you may delete certain records in this l ist by clicking **Delete** .

18. Click **Publish** - the price list becomes available in the Channel One Portal. An alert message appears.

19. Click **OK** .

    Note: Clicking **OK** means that your previous pricing information for this price list has been removed. It has been replaced with the new pricing information you just imported.

20. Click **Products** - the updated product list appears.

    Note: Once you have uploaded the price list, you can assign it to different dealers. You can assign dealers to a list using the *Dealers* section.

21. Click **New** in the *Dealers* section – the *Add Dealers* dialog box appears.

    Note: You can click the respective dealer to select it.

22. Click **Add** the dealer's name appears in the *Dealers* section.

    Note: Dealers should only be assigned to one price list.

23. Click **Clear Cache**.

    Note: It is recommended to clear cache always before applying a price list.

24. Click **Apply** - the price list you imported is now available in the Channel One Portal.

Distributor Set Up

Price Management – Update Pricing

Purpose: In this Quick Reference Guide, you will learn how to manually change the price you will charge your dealers.

1. Click Sales - the *Sales* drop-down list appears.
2. Click Leads and Orders - the *Leads and Orders* page appears.
3. Click either Manage Leads > or Place, View and Track Orders - the Sales application opens.
4. Click - the site map of the Sales application appears.
5. Click Price Lists - the *Price Lists* section appears.

   Note: You can see the information for existing price lists such as **Name**, **Price List Type**, **Currency**, and **Description.** The **Currency** and **Price List Type** fields are auto-populated whenever a new price list is created.

6. Click the price list hyperlink that you wish to edit.

   Note: As a distributor, you can always create a new price list by clicking New and then entering the price list name, type, currency, and description.

7. You can now view the price list details. From this page, you can change the currency and modify the price list description.

   Once you enter this page, the **Products** sub tab is selected by default. Under the *Products* subtab, you can see fields such as **Product**, **Part #**, **Factory Product** checkbox, **Price**, **Cost**, and **Product Type**. These fields are auto-populated. You can, however, use the three sections: **% Cost Markup, % Profit Margin** and **Price Override** to price products for your dealers. Note that the system will only allow you to utilize one of the three options to price a given product.

   Note: Before pricing products, the products must be imported into the product profile tab. For more details on adding products to your catalogue please refer to the Quick Reference Guide on **Product Management**.

8. Enter the appropriate value in the **% Cost Markup** field, the **% Profit Margin** field or enter the desired amount in the **Price Override** field.

   Note: The Channel One Portal auto-calculates the **Price** based on the percentage you entered. The **Price Override** field allows you to directly enter the price at which you want to sell the product.

Distributor Mobile Device

Quick Reference Guide

1

Mobile Lead Management

Mobile Lead Management

Create and Work on a Lead

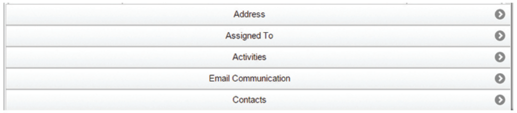
Purpose: In this Quick Reference Guide you will learn about the features present in the Channel One Portal that enable distributors to create and work on a lead, using a tablet device. It is important to note that as a distributor, you will only have the ability to edit leads sourced by distributor and factory, you will not have the ability to edit dealer

1. Tap Sales - the *Sales* drop-down list appears.
2. From the *Sales* drop-down list, select Leads and Orders - the *Leads and Orders* page appears.
3. Tap Manage Leads > - the *Leads List* section under the *Accounts/Leads* tab appears.

   Note: By default, you can see the *My Leads* view. This view only displays existing factory and distributor sourced leads allocated to your dealers. SII Roles at the distributor can view both *My Leads* and **My Team's Leads**, via the drop-down list.
4. You can view the *Leads* section under the *Accounts/ Leads* tab.
5. To view additional information about a lead, tap the lead's tab on the left.
6. To view details under an accordion, tap it.

   Note: As you tap an accordion, the lead's detail section moves to the left of the screen and the respective accordion is expanded on the right.
7. To return to the leads list, tap Accounts / Leads .

   Note: You can also search the leads list or filter the leads list using the filters Search Name
8. To create a new lead, tap Add .
9. To update information about a lead, enter the required details in the fields.
10. To save the lead in the leads list, tap Save .
    Note: If you want to discard the entry, you need to tap **Close**.
    You can update the lead details by tapping **Edit** after selecting the lead.
11. To modify the current lead details, tap Edit .
12. You can update the status of the lead. If required, you may also enter the assigned **Dealer, Address**, and **Company Name** details by typing in the details in the respective fields.
    If you select **Small Business** from the *Market* drop-down list, the **Company** name becomes mandatory. The **Reason** field is mandatory if the status is updated to **Lost** - this will be your dealers' responsibilty to update. **City, State**, **Country**, and **Zipcode** fields are mandatory if the **Address Line** is updated.
13. To update the status of a lead, from the *Status* drop- down list, select the appropriate status.
14. Let's look at how to manage and track the activities your dealers will perform day in and day out, while pursuing a lead. Below the lead's details information section, you'll notice the following accordions:



Mobile Lead Management

15. The *Activities* accordion keeps track of your activities such as phone calls, emails, and in-home consultations. All tasks related to lead conversion can be logged and tracked in this section.

16. To add an activity, in the *Activities* section, tap .

17. Tap the *Type* drop-down arrow and select the required activity.

18. From the *Status* drop-down list, select the appropriate status.

19. If the Activity status is set to **Closed**, the lead **Status** is auto-populated. This is another way to update the lead status.

20. To save the changes, tap .

21. Many leads will be individual residential customers. However the system also enables you to add multiple contacts under a single lead, to help manage your light commercial and small business customers. You can add additional contact details for a small business lead and select a primary contact from the available list.

22. To add contact details, tap

23. In the *Contacts* section, you may enter the email, phone number, and a short address of the specific contact tied to a given lead.

24. In the *Contacts* section, tap

25. The **First Name** and **Last Name** are mandatory fields.

26. In the *Address* section, tap

27. You need to enter the required details in the fields.

28. You can add multiple contact details by tapping **Add** and entering the required details in the added row.

29. To save the address, in the Address section,tap

30. You can view the address and other contact details of the lead by tapping.

31. To view if a contact is primary, in the *Address* section, you can tap the down arrow.

    Note: You can see the *Primary* radio button if there is more than one address.

32. If you are in the *Address* accordion, you can tap **Edit** and scroll down to see the *Primary* radio button.

33. If there are multiple contacts provided for a lead, you can see the list of available contacts in the *Contacts* section.

34. To view the details, you can tap the respective contact.

35. By default, the *Primary* checkbox is selected for the first entry in the contact details and the address sections.

36. If you do not want a contact detail to be the primary contact, you can clear the Primary checkbox.

37. To save the changes, tap

38. A lead is considered closed if its Status is updated to **Won, Lost, Cancelled, or Expired.** You can either manually update the status, or auto-update it via completion of activities.If the Status is updated to **Lost or Cancelled,** updating the **Reason** field is mandatory.

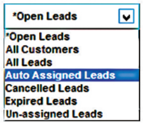
Mobile Lead Management

Assign Leads

Purpose: In this Quick Reference Guide, you will learn how to assign a new or unassigned lead, or reassign an auto-assigned lead to a dealer.

1. Tap Sales - the *Sales* drop-down list appears.
2. Tap Leads and Orders - the *Leads and Orders page* appears.
3. Tap Manage Leads > - the *Leads List* appears.

   Note: By default, you can see the **My Leads** view. This view only displays existing factory and distributor sourced leads allocated to your dealers. If you are a Distributor PCBL, you can view both **My Leads** and **My Team's Leads** via the drop-down list.

4. Tap *Open Leads – the leads list filter drop-down appears 

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   Note: The drop-down list is an easy way to sort the leads displayed.

5. Tap the **Dealer** field of the respective lead.

   Note: These steps apply to any leads that are eligible for assignment or reassignment.

6. Tap - the *Pick Channel Partner* dialog box appears.

   Note: The box displays the available channel partners under your distributorship. You can see the **Dealer** name, **Primary Sales Rep Name**, **Address**, and **Zipcode** of the channel partners.

7. Tap the appropriate dealer name.
8. Tap OK.

   Note: You can assign a dealer only if the **Status** field of the lead is showing **New**, **Expired**, or **Unassigned.**

9. If a lead is re-assigned to a different dealer, the lead disappears from the **My Leads** list. However, if you are a Distributor PCBL, you can still view the lead from the **My Team's Leads** view.

   Once you reassign a lead to a dealer, the dealer principal of that particular dealership is assigned to that lead by default. The dealer principal may then assign the lead to one of the sales representatives.

2

Mobile Ordering

Mobile Ordering

Placing an order on behalf of dealer

Purpose: In this Quick Reference Guide, you will learn how to place an order on behalf of a dealer using a tablet device.

1. Tap Sales - the *Sales* drop-down opens.
2. Tap Leads and Orders - the *Leads and Orders* page appears.
3. Tap Place, View and Track Orders - the list of orders appears.

   Note: A list of orders is displayed on your left with details such as the order number, **Dealer**, **Status**, and **Total** amount details.
4. Tap an order to view additional details.
5. Tap Add - a new form appears with auto-populated **Order #**.
   You need to add the dealer details in the **Dealer** box, or else you will not be allowed to proceed with the transaction. This is the dealer for which you will place the order.
6. Tap in the **Dealer** field – a list of dealers appears.
7. Tap the dealer for which you would like to place an order.
8. Tap Add - the dealer's name now appears in the respective field.
9. Tap Step 1: Shop Products - the *Select Products* section appears.

   Note: From this view, you can edit the order details by tapping Edit .
10. Tap the required product to select a product.

    Note: You may use the search option to locate a product.
11. Tap Check Inventory - a confirmation message appears.

    Note: If the product is available in distributor inventory, a confirmation message appears and the system provides you with an estimate of the number of days required to ship the product. If the product is not available in distributor inventory the system will then check factory inventory. If the product is available in factory inventory the system will provide you with an estimate of the number of days required to ship the product. If the product is not available at the distributor or at the factory the dealer portal will provide lead time and shipping time estimates.

    The Channel One Portal has a limit on inventory checking - if you ask the system to check for a count of products that exceed this product specific limit, a message will appear requesting that the user work directly with the distributor.
12. Tap OK.
13. Enter the required value in the **Quantity** field.
14. Tap Add Item - a confirmation message appears.
15. Tap OK .
16. Tap Step 2: Add Compatible ATS - the *Add Compatible ATS* section appears.

Mobile Ordering

17. **Note:** The **Compatible ATS** list only contains ATS that are compatible to the selected genset. The selected genset is the genset that is highlighted in the order cart. To generate a new list of compatible ATS or accessories simply tap another genset on the cart. The list of compatible ATS changes as per the selected Genset in the **Order Cart.**
18. Tap the required product.
19. Tap Add Item .
20. Tap Step 3: Add Compatible Accessories - the *Add Compatible Accessories* section appears.
21. Tap the required product.
22. Tap Add Item .
23. Tap Step 4: Add Distributor Products - the *Add Distributor Products* section appears.

    Note: Distributor products are non-CPG products that are sold by distributors. There is no compatibility checker in the distributor products list. Therefore, you can view all the available distributor products from this accordion.
24. Tap the required product.
25. Tap Add Item .
26. Tap Step 5: View Order and Checkout - the *View Order and Checkout* section appears.

    Note: In this section, you can review the order details. You can see the list of products you have added to the **Order Cart**. Note that the total amount has been auto-updated as per the products you have selected.
27. Tap Edit to modify your order.
28. Tap Save .
29. Tap Menu the *Menu* drop-down list appears.
30. Tap Submit Order - a confirmation message appears.

    Note: If your dealer's profile is configured to receive order status email notifications, your dealer will receive a system generated email notification confirming the order submission. The email will be sent to the dealers registered email address.