Dell Global Portal
User Guide

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What is Dell Global Portal?

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

What can you do with Dell Global Portal?

Using your Dell Global Portal Site, you can

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

Getting Started

The Global Portal User Guide will help you get started on the path to streamline your worldwide procurement with Dell.

Table of Contents

1 Log into Portal

1.1 First time Portal User

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

Log onto your Global Portal Page at

www.dell.com/premier (Fig 1.1)

- Click 'Premier Login'

- Enter your profile email address and temporary password provided. Click Sign In (Fig 1.2)

- Choose the account/access group from the drop -down box (if applicable). Click Access Premier (Fig 1.3)

Note: You may only have one access group and therefore you will be directed straight to your log-in page.
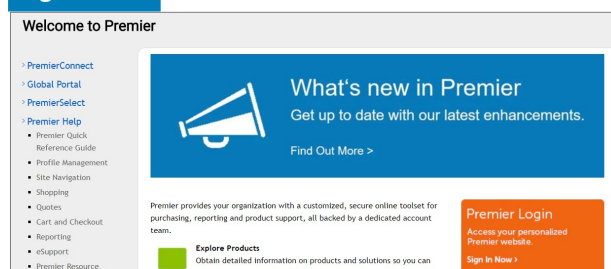
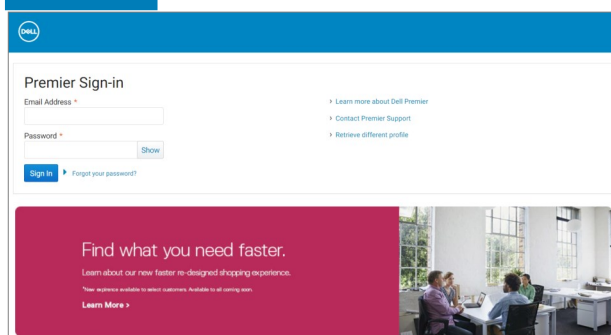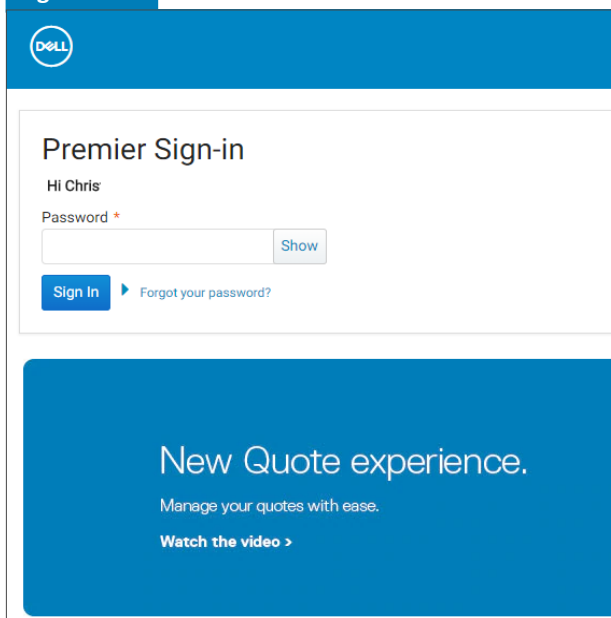## 1.2 Returning Portal User

Log onto you Global Portal Page at

www.dell.com/premier (Fig 1.1)

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

  If you have forgotten your password click on Forgot Password (Fig 1.3)

- Choose the account/access group from the drop -down box (if applicable). Click Access Premier.

Fig 1.1

Fig 1.2

Fig 1.3

1.3 Forgot Password

Enter your profile email address and click Continue (Fig 1.4). You will receive an email shortly.

1.4 Manage your Account Information

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

· On the top navigation bar click on Account (Fig 1.5)

· Page Settings allows you to view your Dell account team, access and manage your company addresses, users and the list of Dell authorized partners (administrators only).

· The Orders & Invoices section gives you access to reports, shared documents, quotes and order status.

· You can customize your profile through Your Account section. Select Personal Information to change your personal details or select Change Password to update / change or reset your password.

Note: only the user can change their personal information or change / reset their password.
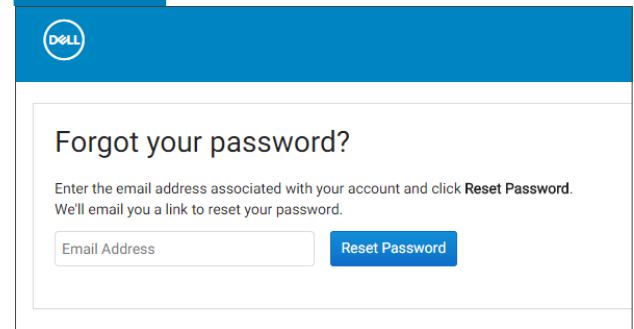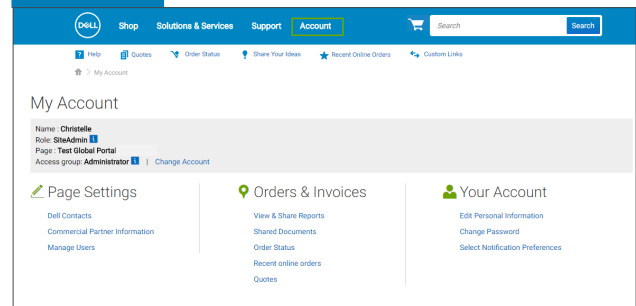
Fig 1.4

Fig 1.5

2 Landing Page

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

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

2.1 The Country Selector

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

2.2 My Tools

The "My Tools" section provides easy access to your most commonly used features. From here you can quickly retrieve and manage your Quotes, access your Standard Configurations and check the status of your global orders. Simply click one of the links highlighted in blue to navigate to the respective destination on your page.

2.3 Shop Dell Products

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

Fig 2.1
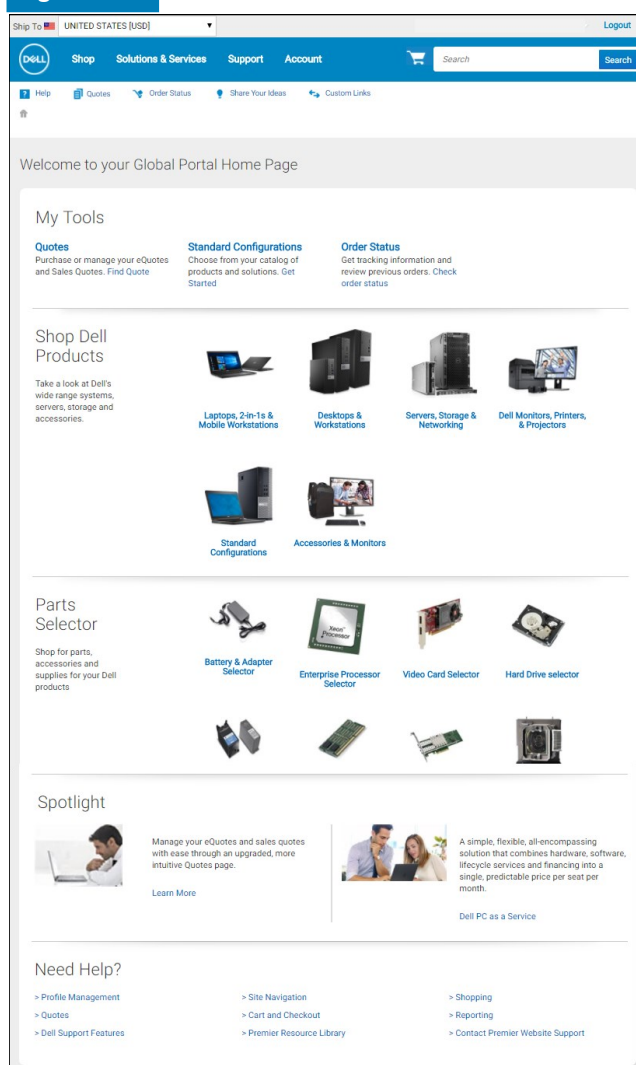
2.4 Parts Selector (if enabled for your page)

The easy-to-use "Parts Selector" section helps you to find and shop for compatible parts, accessories and supplies for your Dell systems in a pragmatic way. Simply click one of the links highlighted in blue to access a specific parts selector tool. Within the respective tool you will be asked to provide more specific information relating to the part you may be searching for.

2.5 Spotlight (if enabled for your page)

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

2.6 Need Help?

The "Need Help?" section gives access to detailed explanations about most Global Portal features. Simply click one of the links highlighted in blue to retrieve the respective help topic of interest to you.
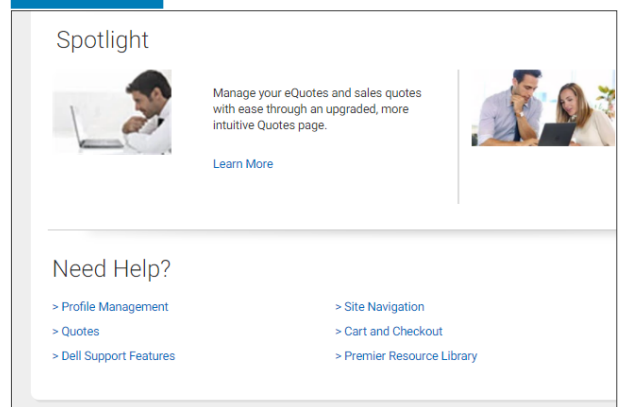
2.7 Choosing your Home Page

If your Dell Global Portal landing page has been set up for user personalization, you have the ability to customize your page by setting Quotes or Standard Configurations as your landing page. If you would like to select one of the other landing page views, open the desired category page ("Quotes" or "Standard Configurations") and select the "Make this my Homepage" link, (fig 2.3) which is located at the top right-hand corner of your page. If you want to revert back to the default home page view, simply click the "X" in the top right corner. (fig 2.4).
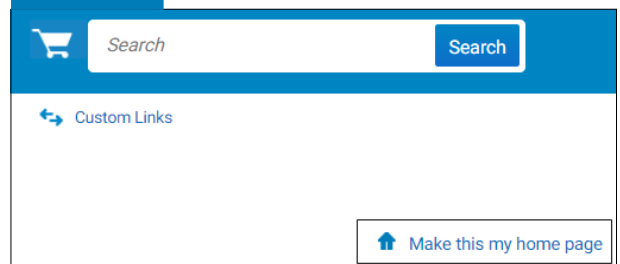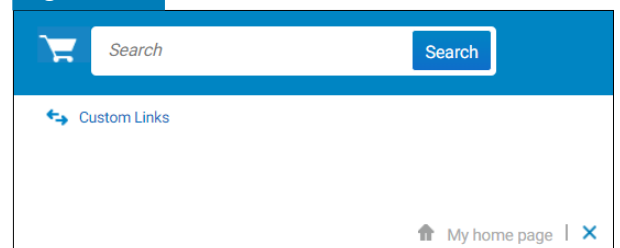
Fig 2.2

Fig 2.3

Fig 2.4

3 Product Catalogs

Before you start your shopping, select the desired "ship to country" from the selector available at the top of your Global Portal page. This "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized

3.1 Global Standard Configurations

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

Standard Configurations have your organization's negotiated pricing included.

Fig 3.1

My Tools

Quotes
Purchase or manage your eQuotes and Sales Quotes. Find Quote

Standard Configurations
Choose from your catalog of products and solutions. Get Started

3.2 Full Systems Catalog

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

- Choose the product group you wish to order, narrow your selection using the assisted navigation and Add to Cart.

- Follow the global standards checkout process (see 5.3).

Fig 3.2

Shop Dell Products

Take a look at Dell's wide range systems, servers, storage and accessories.

View All Products

Laptops, Tablets & Mobile Workstations | Desktops & Workstations | Servers, Storage & Networking | Dell Monitors, Printers, & Projectors

Standard Configurations | Featured Products | Accessories & Peripherals

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

3.3 Software and Peripherals (S&P) Catalog

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

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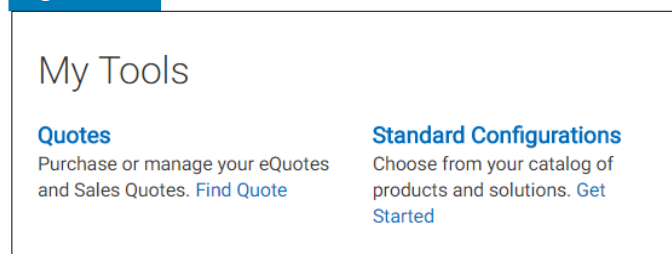
- Follow the global standards checkout process.

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

4 Quotes

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

Before you start, select the desired "ship to country" from the selector available at the top of your Global Portal page. This "ship to country" selector, which is located at the top of your page, specifies the currency available within the selected country and provides dynamic selection of localized option

4.1 Creating and saving an eQuote

- Select product from Global standard configurations, S&P or Systems catalogs as required.

- When ready, Add to Cart (see 5.2) and click on Save as eQuote. (Fig 4.1)

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

- Specify the name of your eQuote.

- If you need to send this eQuote to your purchasing agent and/or any other recipient via email, complete the appropriate fields. The selected Authorized Buyer has the ability to approve/purchase eQuotes off the Page.

- Enter notes and description if needed (optional)

- Enter the Order Contact information

- By entering your Shipping / Billing address (optional), you enable us to calculate shipping costs and any other applicable fees, and you save time when placing your order.

- You can even select your delivery and payment methods.

- Then click Save eQuote. You will receive an e-mail confirmation with your saved eQuote information for future reference.

Fig 4.1

Fig 4.2

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

4.2 Retrieving an eQuote

There are two ways to retrieve an eQuote (Fig 4.3). You can click on the Quotes link located just below the top navigation, or you can view and retrieve your eQuotes from the "**My Tools**" section available on your homepage. This will provide you with a list of all eQuotes available to you.

- The fastest way to find your quotes is to use the dynamic filtering search box. You can search by eQuote name, number, creator or buyer in order to locate your quotes.

- From within the eQuote list, click on the eQuote number. If you need to purchase multiple quotes, you can easily select them and click « Purchase Selected ».

- To make changes to the quantity, open the eQuote by clicking the eQuote number, adjust the quantity and click "Save new eQuote" to save your changes. The updated configuration will be saved as a new eQuote referencing a new eQuote number. The original eQuote will not be changed and remains in your list until it expires or is deleted.

- When ready to purchase, just proceed to checkout.

Fig 4.3

Fig 4.4

4.3 Requote an expired eQuote

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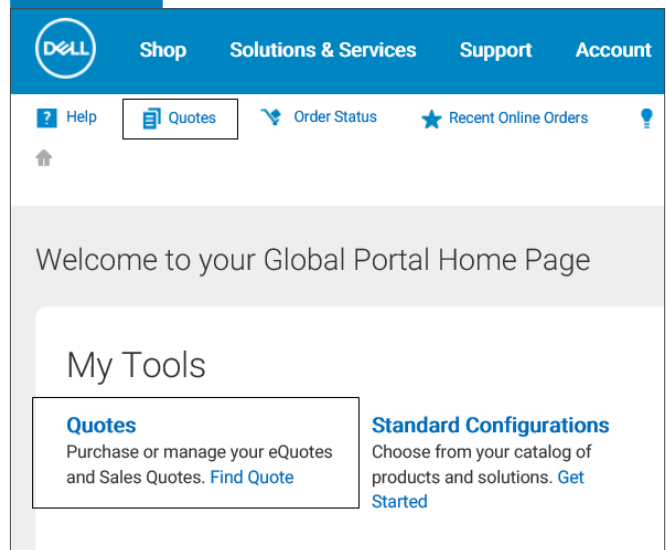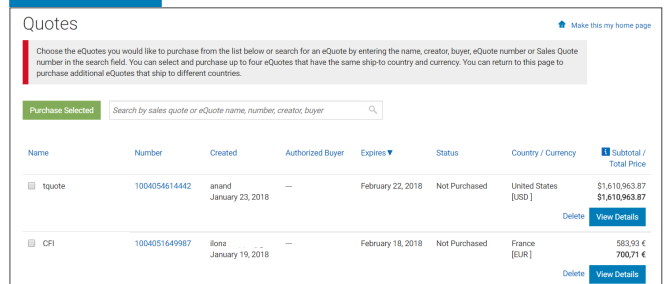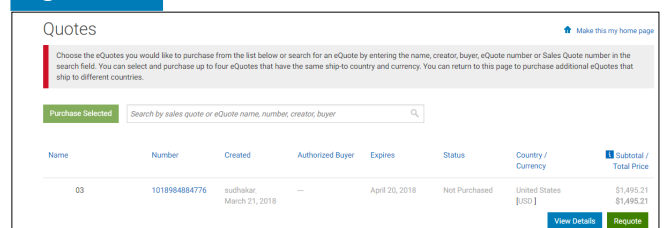

Fig 4.5

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

5 Shopping and Ordering

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

5.1.1 Shopping and ordering a Global Standard Configuration

Open the "Standard Configurations" page.

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

View the detailed configuration by using the "Quick Specs" link. (Fig 5.1)

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

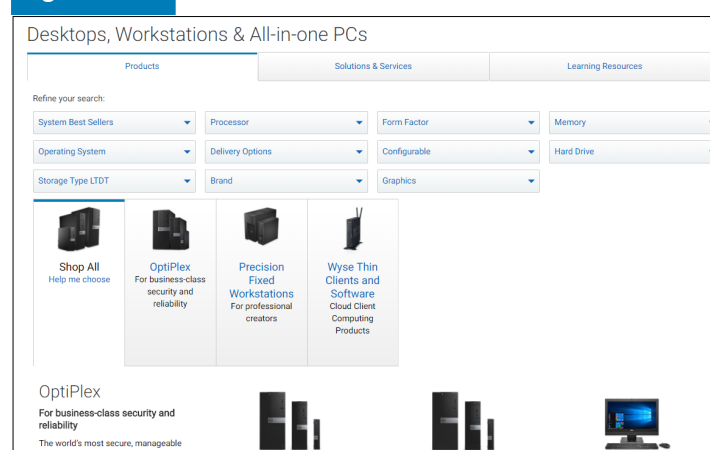Choose the options you are interested in. Keyboard layout, system software language and power cord are automatically pre-selected based on the language and regional specifications of your shipping destination. Under 'More Actions' (Fig 5.2) , you can review the summary of your configurations, email it and/or print it or save as pdf. When you are ready to purchase, just Add to Cart.

5.1.2 Shopping and ordering from your catalogs

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

Fig 5.1
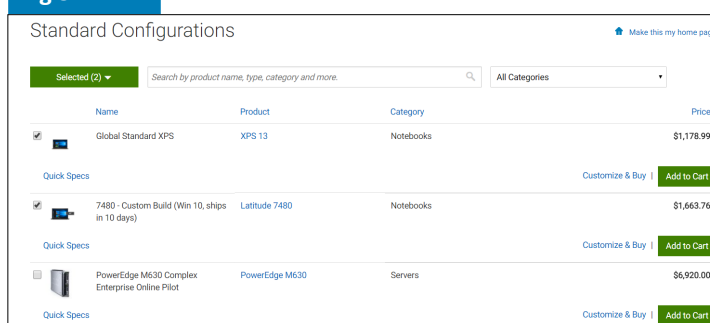
Fig 5.2
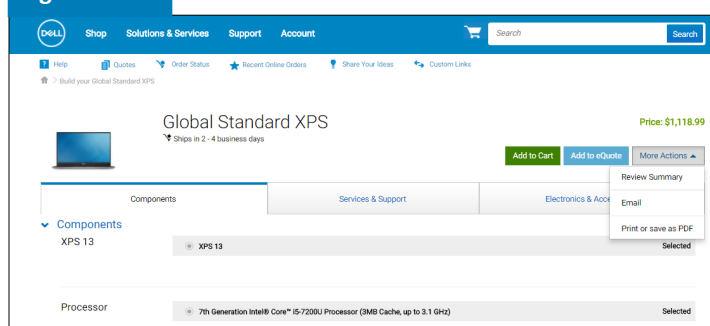
Fig 5.3

> ℹ Keyboard layout, system software language and power cord are automatically pre-selected based on the language and regional specifications of your shipping destination.

5.2 Add items to Cart

- Select Add to Cart (Fig 5.4)

- Change the quantity if needed

- Check that the Ship to Country and currency are correct

- For placing your order, click on the green "Checkout" button. This will take you to the secure check-out screen.(Fig 5.5)

Fig 5.4

5.3 Proceed to Checkout

- Verify Contact Information

- Complete the required billing and shipping information. The Search field allows for easy and intuitive address search. Select an already pre-populated billing address (If not available contact your local Dell Sales Representative). Choose a shipping address from your Address Book or add a new ship-ping address if needed.

- Select your delivery method

- Select your payment method using the drop down menu.

- Complete the Trade Compliance questions (mandatory)

- Attach supporting documentation (optional)

- Within the "Review" screen, check the order information and make any necessary changes by clicking on the Change link.

- Click the green "Order and Confirm Payment" button to send the order to Dell.

Note: You will receive an automated Dell acknowledgement.

Fig 5.5

6 Address Book

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

6.1 Accessing your Address Book

- Go to Account located on top of your Global Portal Page.

- Select the Manage Addresses link.

Fig 6.1

6.2 Creating a new Shipping Address

If there are no previously saved addresses or if you need to ship to a different address than what is displayed, you can add a new address.

- Select the checkbox to indicate the type of address (shipping) - (Fig 6.2)

- Complete the required fields and save.

Fig 6.2

6.3 Managing your Addresses

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

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

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

Fig 6.3

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

7 Dell Partner Country Ordering

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

7.1 Selecting a product and sending to Dell Authorized Partner

- Select your "ship to country" from the country selector at the top of the page

- Select the Dell Authorized Partner from the dropdown box. (Fig 7.1)

- Select and customize the configuration you are interested in. Keyboard layout, software language and power cord are automatically pre-selected based on the language and regional specifications of your shipping destination. These automatic selections can be changed in the configurator.

- Select Add to Cart

- Change the quantity (if needed) and click on Create Quote. (Fig 7.2)

- Complete the required information and click Send to Partner. (Fig 7.3)

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

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

Fig 7.1
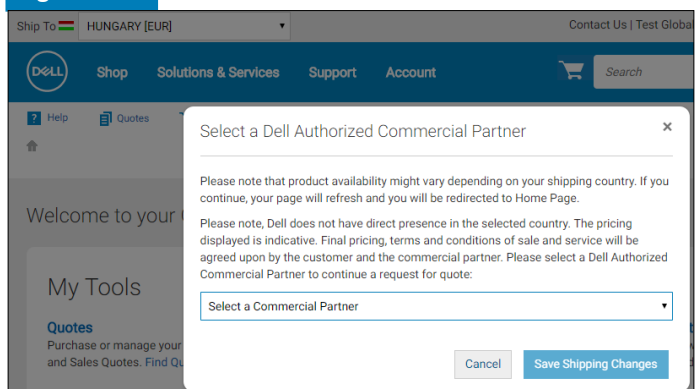
Fig 7.2
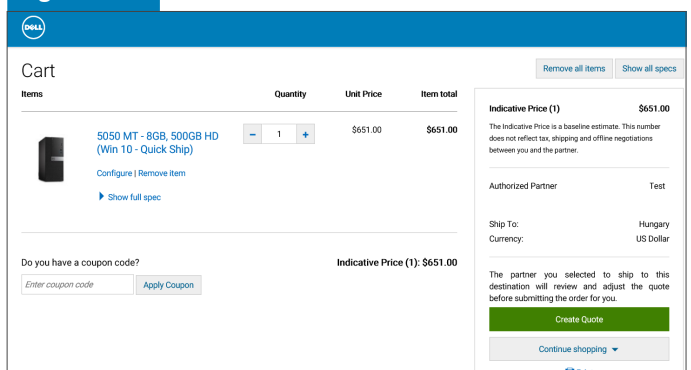
Fig 7.3
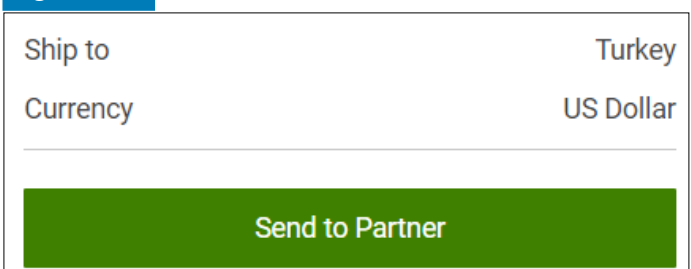
i Save time. Manage your list of favorite Dell authorized partners through the "Account" tab at the top of the page. (More info page 5)

7.2 Request for Quote (RFQ)
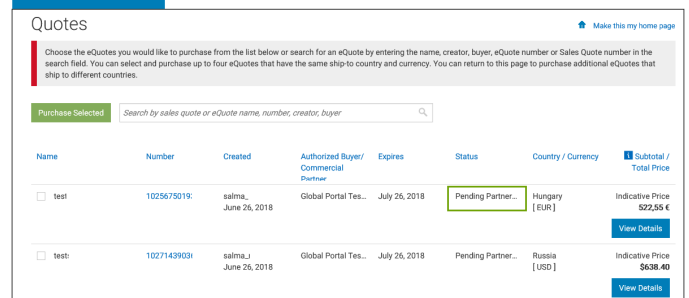
You will receive an email providing your Request Number. Additionally, your request will be available in the Quotes page.

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

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

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

Fig 7.4

7.3 Request for Order (RFO)

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

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

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

Fig 7.5

Fig 7.6

8 Reporting

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

8.1 Global Order Status

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

Searching and finding your orders

You can access Order Status by clicking on the Order Status link (My Tools) in the tool bar underneath the Global portal navigation or under the « My Tools » section. (Fig 8.1)

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

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

- Country
- Customer Number
- Status of the Order
- Timeframe (Last 45 days, last 90 days, 6 months, last 1 year and last 2 years)
- Order number/PO number

Per country details include Dell Purchase ID, Description, Estimated delivery, Order date, Dell Order number, PO number, Status and other actions.

Note: These columns can be customized by using the "Options" button on the page. Only seven (7) columns can be enabled at one time, you must deselect a column before enabling another column.
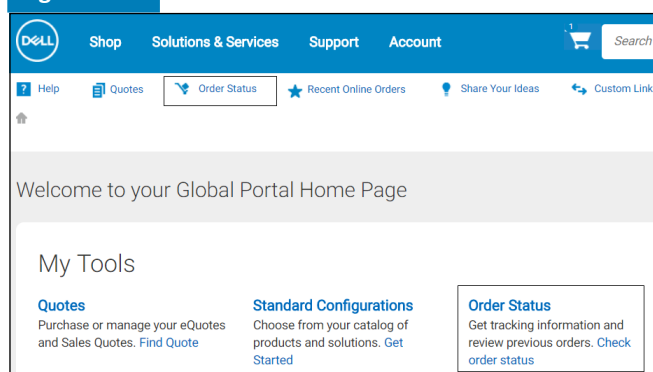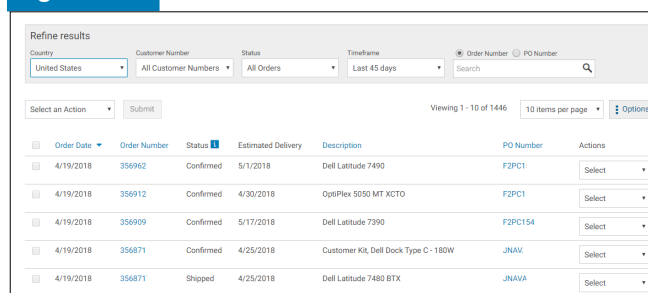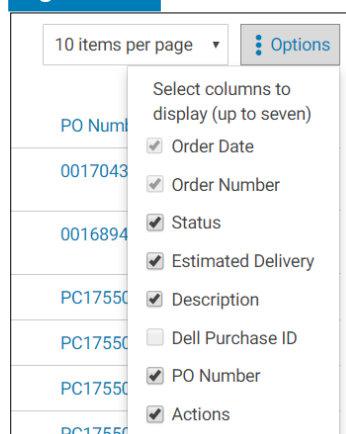
Fig 8.1

Fig 8.2

Fig 8.3

Viewing order details and real time order tracking

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

Export, Subscribe or Unsubscribe

Using the "Select an Action" dropdown menu, you can

- Export all- if you select this action you can download your orders into an Excel document.
- Subscribe to selected- you can select one or more orders that have not been cancelled, shipped or delivered and subscribe to these orders. Results can be edited and an e-mail address can be registered to receive any order shipped or order delay e-mail notification for any order listed.
- Unsubscribe- you can unsubscribe from any order that you have previously subscribed to.

8.2 Purchase History and Warranty Reports

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

- Go to your Account page and select View and Share Reports.

- Choose the required report

- Complete the required fields (Account, Product, Region, Country and currency)

- Click View Report (top right) to access the report in graphical format (Fig 8.6)

- Select Summary View to access the report in detail and filter or export to Excel.

Fig 8.4

Fig 8.5

Fig 8.6
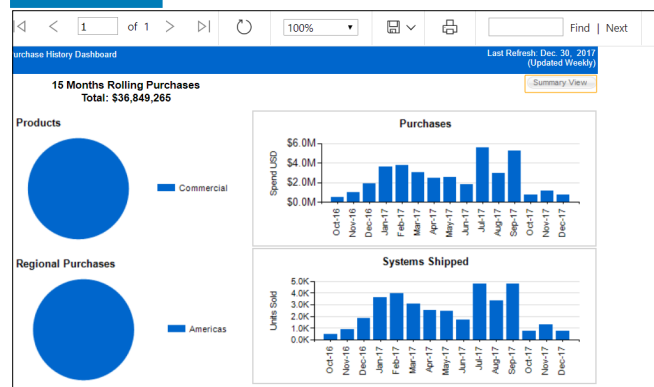
The reports display all orders placed via Global Portal, local Premier pages, or via telephone or email through a Dell Sales Representative.

8.3 Invoice Availability

Searching for an Invoice in Americas or APJ

- Click on Account at the top of the page, then View and Share Reports, and Premier Invoicing report.
- Search for your invoices using various filters, then click Search. Download into Excel option is also available. (Fig 8.7)

Searching for an invoice in EMEA*

- Click on Account at the top of the page, select View and Share Reports, then My Financials Invoice reporting. Complete the required information to get an overview of your invoices both outstanding and paid.

*Europe, Middle East, Africa

Fig 8.7

9 Access Management

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

Managing Roles and Access Groups

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

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

Fig 9.1

9.1 Managing Users

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

Fig 9.2

- Go to Account located on top of your page (Fig 9.1)

- If you have an Administrator user role, you will see the "Manage Users" section.

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

- At any time, you can narrow your search by applying filters.

- For a new user to access the Premier Page, enter the new user's email and click "Add User"

- Select an access group and a role applicable to this new user (Fig 9.2)
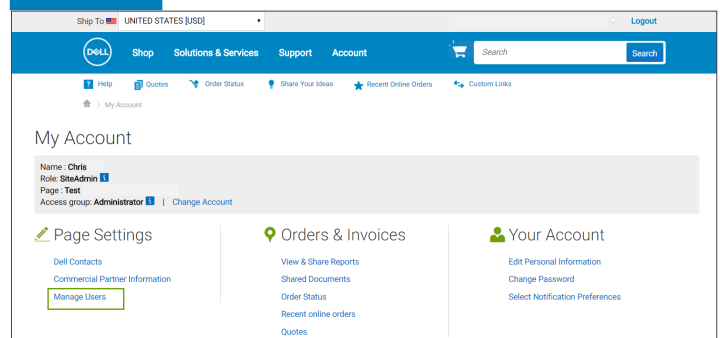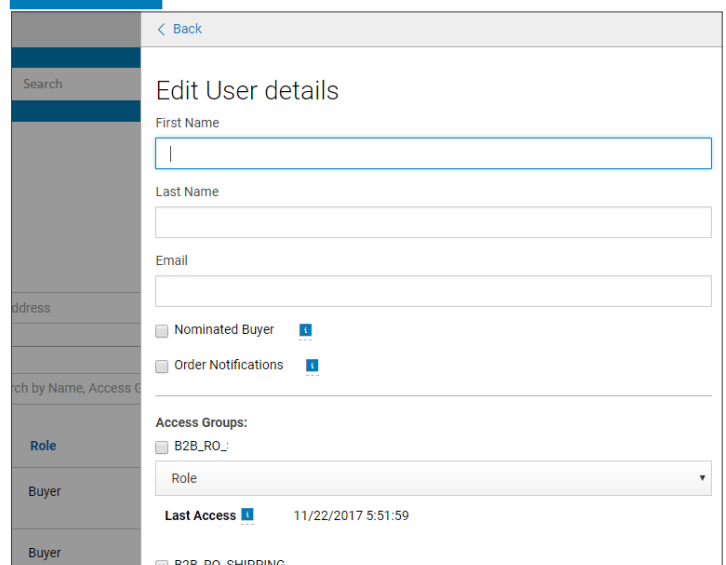
- Click "Save and Send Email to User"

> Select the Access Group and the Role to decide what this user can see and do within the Global Portal page.

9.2 Selecting Roles and Access Groups

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

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

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

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

10 Global Account Team

Dell Account Team

Email your Dell representative directly from your Global Portal page.

- Go to Account, select Dell Contacts (Fig 10.1)

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

Fig 10.1
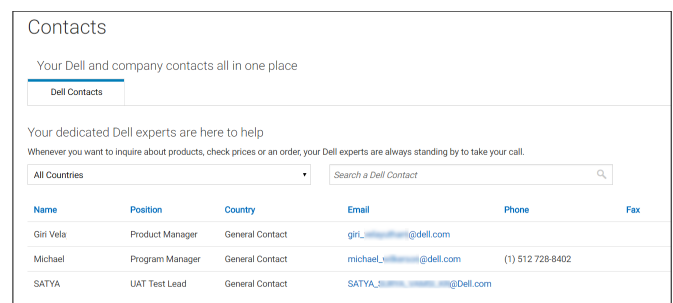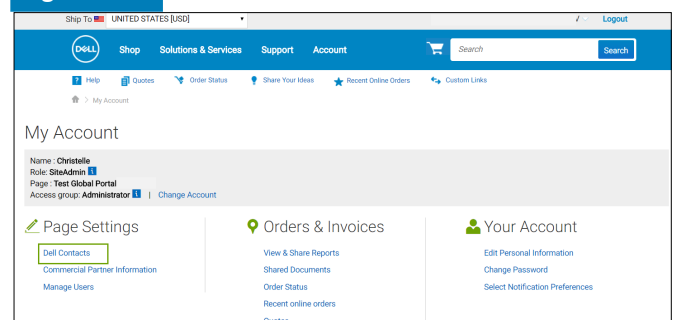
Need help?
Email: global_portal_support@dell.com

11 Useful Resources

Global Portal Video Library

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

Need help?

Email: global_portal_support@dell.com