TPI Sale Rep Portal

HELP GUIDE

Contents

TPI Sales Rep Portal

Is a place for Sales Reps to place and track orders, track shipping, receive updated pricing and inventory information.

This document provides an overview of the features available to the sales reps.

To connect to the connect to the web portal click on the following link
HTTPS://salesrep.tpicorp.com

If you have question or need assistance please contact the TPI Customer Service at
order2@tpicorp.com .
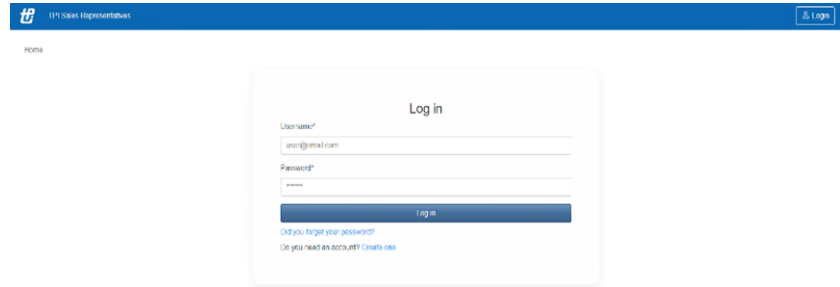
Legend

Delete Icon	🗑 or ✕
Drop-Down	▾
Duplicate Icon	⧉
Export Icon	▦
Filter Icon	⊜
Information Icon	ⓘ
Profile Icon	👤
Search Icon	🔍 or 🔍
Select box	Off ☐
	On ☑
Sort Icon	↓≡
Toggle Icon Turn features On and Off	🔵

Create an Account

Click on Create One

Type Your First Name

Type your Last Name

Type your Email Address

Type Password
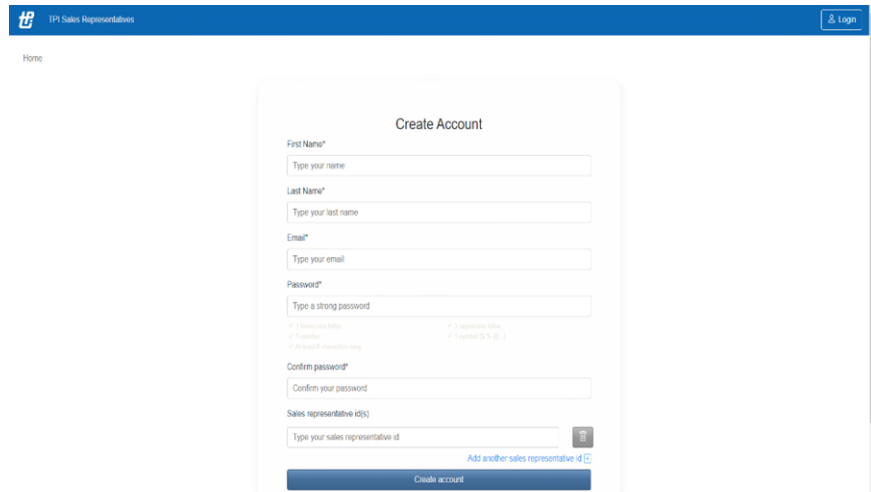
Confirm Password

Add Sales Rep Number

Click add another sales rep number

(if you have multiple sales rep accounts)

Click create account

You will receive an email from TPI Customer Service on the approval of your account

Request access with a TPI Network Account

Type in correct TPI Network Account username

Type in correct password

Click Login

Click on Request Permissions Button

Type in the Sales Rep Number

If your account has more than one Sale Rep numbers, then Click "Add another sales representative ID" Link

(Click "Add another sales representative ID" Link as many times needed

After the sales representative IDs are enter click Request Permissions

Log on to the Sales Rep Portal

Type in correct username

Type in correct password

Click Login

Forgot Password

Forgot password is for the users that created an account through the process in the Create an Account section. If you are using a TPI Network Account, you will need to contact the TPI IT Department for assistance.

Click on "Did you forget your password?"

Type in email address

Click "Recover Password"

You will receive an email from TPI (noreply@tpicorp.com)

Click on the "click here" link

Type in your new password and retype it

Click update when finished

Privacy Policy - Terms and Conditions

Portal Log In page

Enter username and password

Click Log In

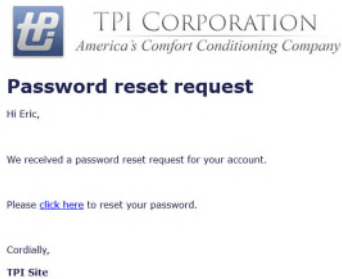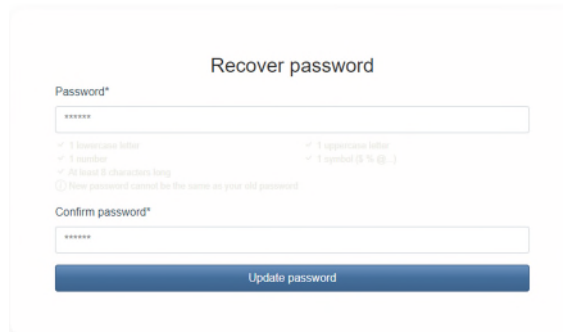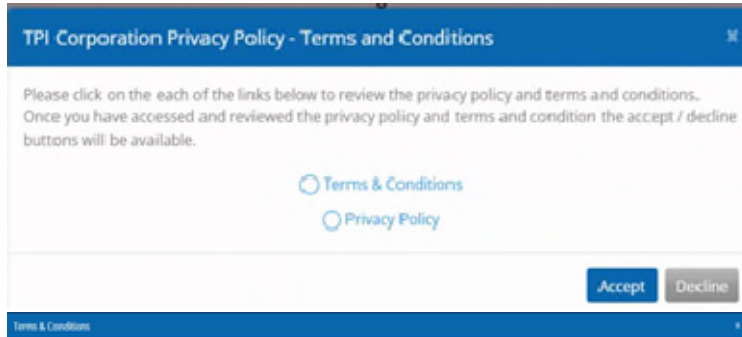TPI Corporation Privacy Policy - Terms and Conditions window will appear

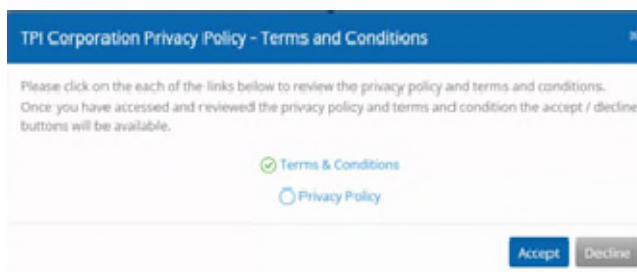Clicking on the Terms and Conditions link

Terms and Conditions window appears
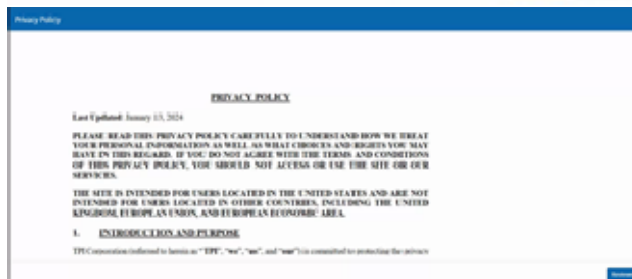
You must review the entire document

Click Reviewed Button at the end of the Document

Window Closes returning you to TPI Corporation Privacy Policy - Terms and Conditions window

Clicking on the Privacy Policy Link

Privacy Policy window appears

You must review the entire document

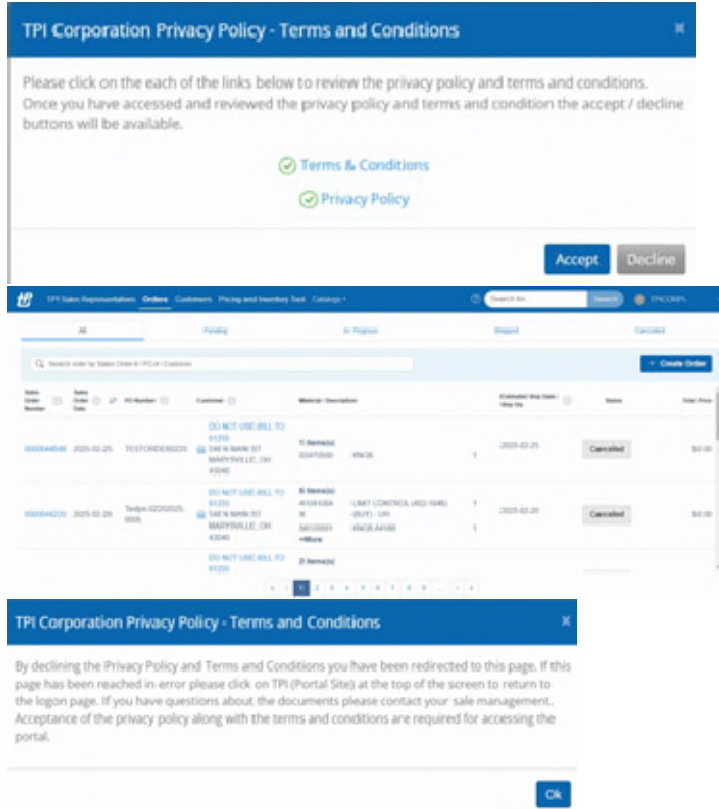Click Reviewed button at the end of the Document

Window Closes returning you to TPI Corporation Privacy Policy – Terms and Conditions window

TPI Corporation Privacy Policy - Terms and Conditions

Please click on the each of the links below to review the privacy policy and terms and conditions. Once you have accessed and reviewed the privacy policy and terms and condition the accept / decline buttons will be available.

✓ Terms & Conditions
✓ Privacy Policy

Accept   Decline

Click accept and the site will appear

Click Decline the following Screen appears

Clicking Decline 3 times will result in the account being lockout

TPI Corporation Privacy Policy - Terms and Conditions

By declining the iPrivacy Policy and Terms and Conditions you have been redirected to this page. If this page has been reached in error please click on TPI (Portal Site) at the top of the screen to return to the logon page. If you have questions about the documents please contact your sale management. Acceptance of the privacy policy along with the terms and conditions are required for accessing the portal.

Ok

Home Screen

Home Screen

Shipped Sales Orders – Dashboard Section

Columns
- Sales Order Date
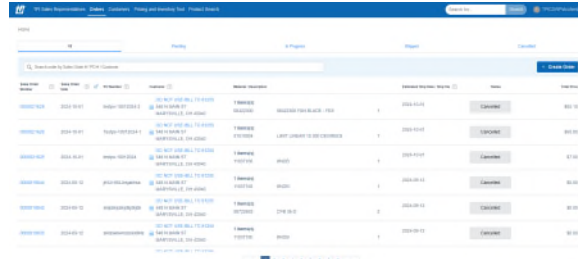- Sales Order / PO Number
- Customer
- Ship To
- Chip Via
- Amount

[Approving Sales Reps and Customers Accounts](#)

Orders

Orders Tab (Home Screen)

Home Screen is Orders

Order tracking screen appears with 5
Tabs (All, Pending, In Progress,
Shipped, Cancelled)

All tabs have the following fields
    Sales Order Number
    Sales Order Date
    PO Number
    Customer
    Material / Description
    Estimated Ship / Ship Via (All Tab
Only)
    Estimated Ship (Pending / In
Progress Tabs)
    Ship Via (Shipped Tab Only)
    Status / Total Price Columns
      (do not appear on Cancelled
Tab)

Order Summary

Click on order number
(Order Summary appears)

Verify that the following information appears in the order summary

Information section
Sales order number
Sales Order Date
PO Number
Creator
Sales Representative
Expected Shipping Date

Value
Subtotal
Sales Tax
Grand Total

Bill To
Party
Phone
Address

Ship To
Party
Phone
Address

Items Tab: items that were ordered shows in this field

Files Tab:
All files uploaded to the order
Click on the file name to open the file

Comments Tab
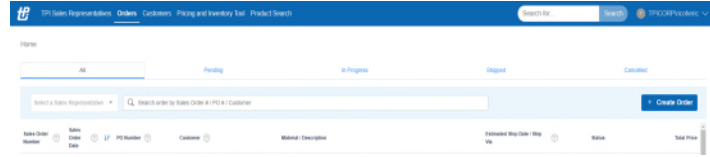All comments typed in during the ordering phase is present

Click the Back Arrow to return to the Order Tracking Screen

Create an Order

Click the Create Order Button

Order Application
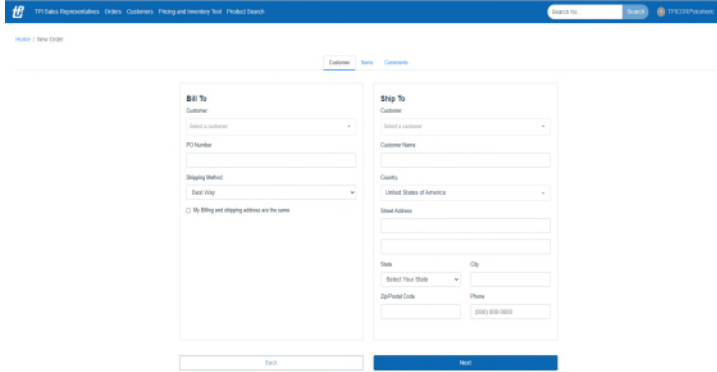
Customer Tab:

Bill To:

Select a Bill to Customer from the drop down Box

Bill to Address is not editable
Payment Terms Displayed
Sales Representative Name and Number Display (Customer Admin Only)

If the account is on Credit hold then the Credit hold message appears and the order cannot be Converted

Bill To

Customer:

DO NOT USE-BILL TO 81255 - 0000013841

Address:

548 N MAIN ST
MARYSVILLE, Ohio, 43040
United States of America
Tel: 9377387500

Payment Term:

2% 10 net 30

Type in PO Number

Make this number unique with Alpha and Numeric

PO Number

Select Shipping Method Default is Best Way

Shipping Method:

Best Way
Best Way
UPS
FedEx
Will Call

Ship To:

Option 1: Select the check box by "my Billing and shipping address are the same"

☑ My Billing and shipping address are the same

Option 2: Select From Drop Down Box
   Note: Ship to Address is not editable

Ship To
Customer:
DO NOT USE-BILL TO 81255 - 0000013841
Address:
548 N MAIN ST
MARYSVILLE, Ohio, 43040
United States of America
Tel: 9377387500

Option 3: Type in the Customer information
    Name
    Street Address
    Select State
    City
    State
    Zip Code
    Phone Number

Ship To
Customer:
Select a customer
Customer Name
Test Co
Country:
United States of America
Street Address
114 ROSCOE FITZ RD

State: Tennessee   City: JOHNSON CITY
Zip/Postal Code: 37615   Phone: (423) 722-1456

Click Next
   (Duplicate PO number will display an error
If the account is on Credit hold then the Credit hold message appears.)

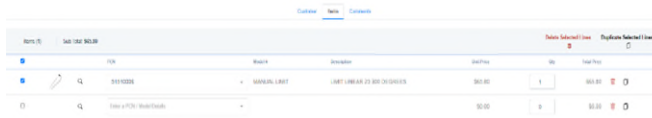## Items Tab

Option 1:
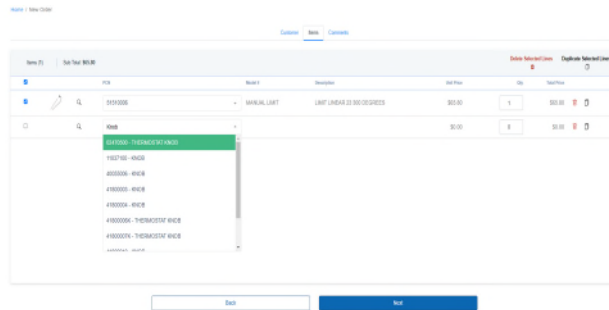 Type PCN in the text field
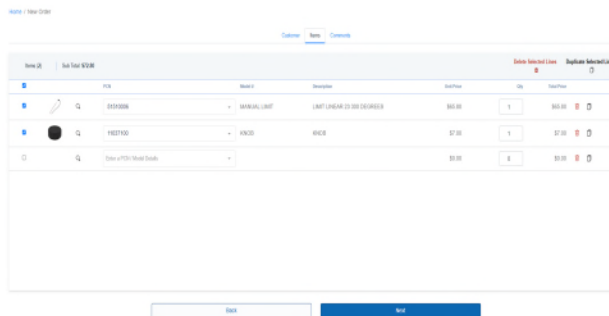 Click on the PCN to be added
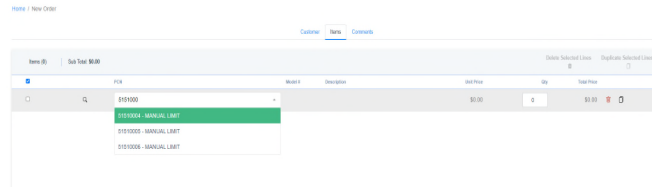
Item is added to the Order

Option 2:
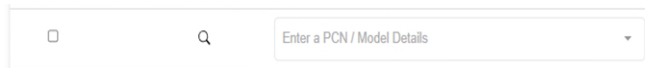 Type in the Model number
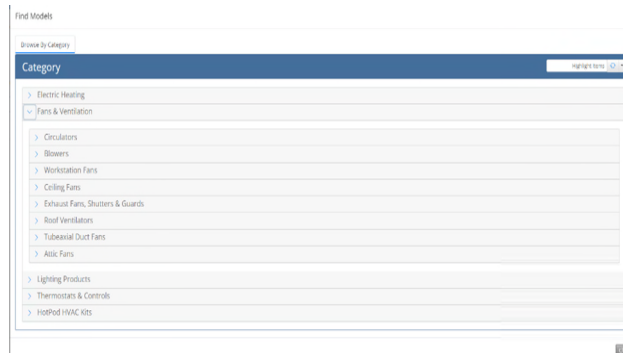 Click on the Model to be added

Item is added to the Order

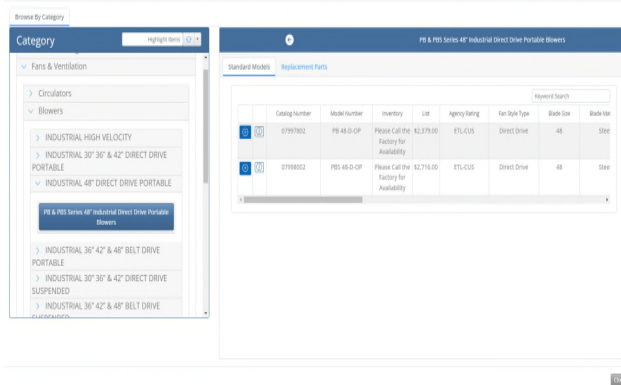Option 3: Catalog Search
  Click magnifying glass

Select a Category
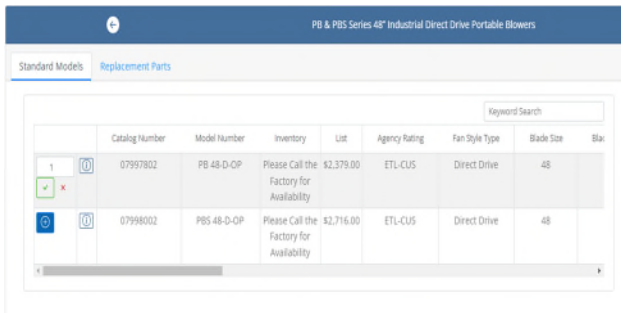
Select a Product Class

Select Manufacturing series

Select a product

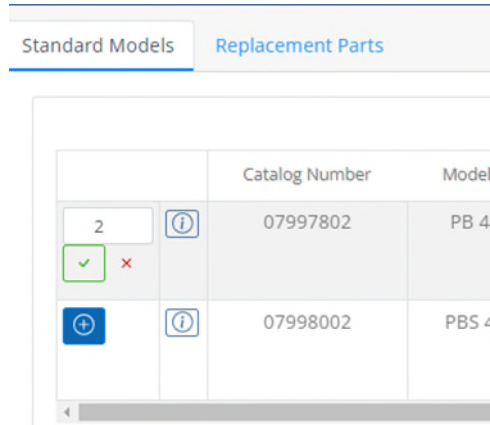
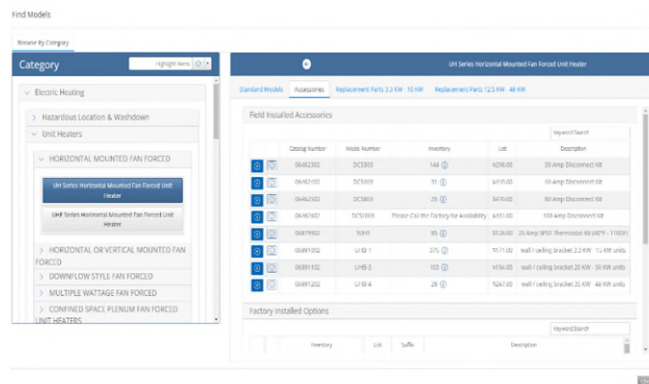Click the add button beside the model that you want to add

Adjust the quality (Typing or using the Arrows with mouse on the right side of the value)
Click the Green Check to add to Order

To view other Product tables
Click on the name to open the tab
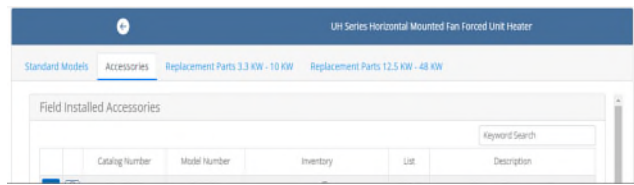
Once you selected all order items

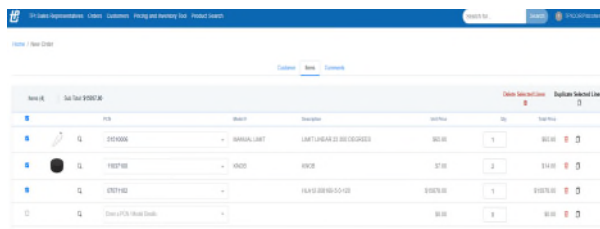Click "Close" to close the window

Adjust the quality

Type in the quantity
 or
Using the Arrows with mouse on the right side of the value

Item count and Sales order Subtotal is in the up left corner
Subtotal is without tax

Line-item deletion 🗑 and duplication ⬜ are at the end of each line
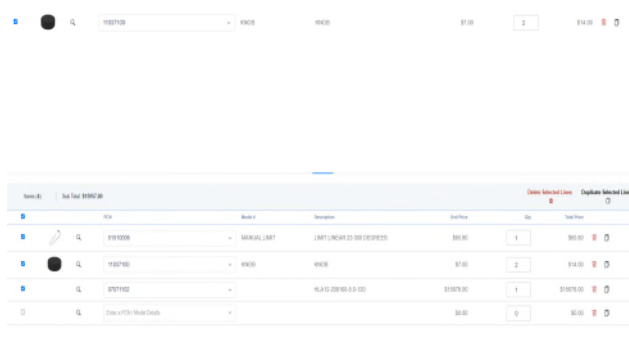
Duplicate and Delete selected lines

Using the blue check ☑ box on the left side
On the Column Header row the blue check box selects all rows
Select multiple line by click on the blue check

Then click on the Delete or Duplicate Selected line

Click Next

Shipping and Documents

| Shipping and Documents	
Provide all the shipping requirements (Shipping Instructions, Special Instructions, Tagging Information, Additional Instructions), that is necessary for this order. Shipping Method line is a static line that will be uploaded to all orders. To remove a line, click the trash can at the end of each line. A blank line will be visible in all sections. Once a line has any value, a new line will appear. Only line with information will be uploaded to SAP.	**Shipping Notes** ❓ Shipping Instructions: Shipping Method: Best Way Test 1 🗑 Test 2 🗑 🗑 Special Instructions: Test 3 🗑 Test 4 🗑 🗑 Tagging Information: Test 5 🗑 Test 6 🗑 🗑 Additional Instructions: Test 7 🗑 Test 8 🗑 🗑
Drag the customer's Purchase Order Document for this order to "Choose a file or drop it here" box. This will attach the document to the order Multiple files can be added if necessary	**Documents** Purchase Order Documentation is Required ❓ Choose a file or drop it here... Browse 📄 EGtest05072023_PDF.pdf 36.7kb 🗑

Click Place Order
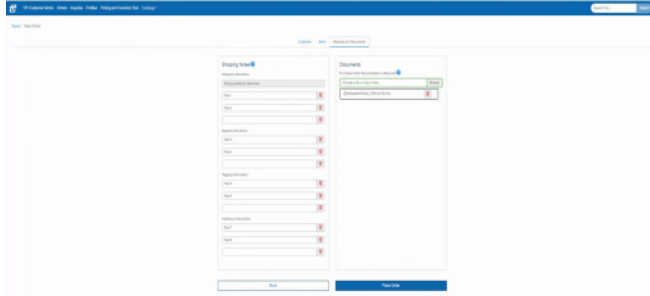
Click Yes to Confirm
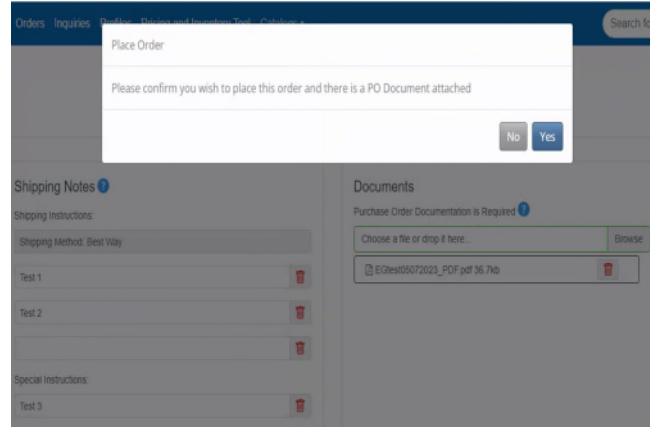
Order Summary Screen will appear
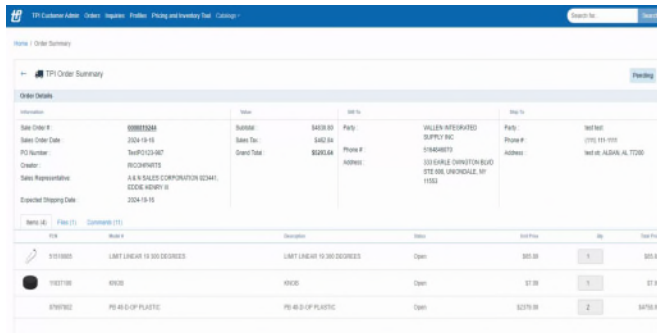
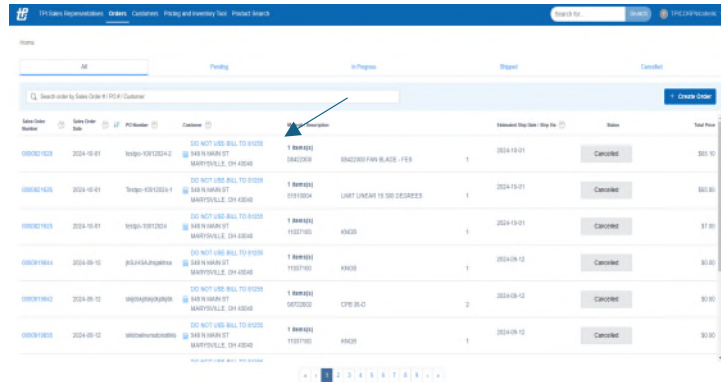# Profiles
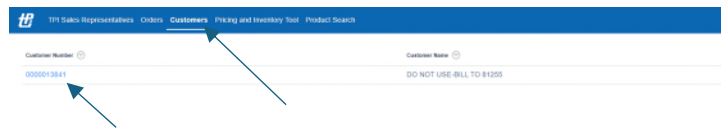
3 methods of accessing Customer Profiles

Option 1:
    On the Orders Tab
    Click on Customer Name
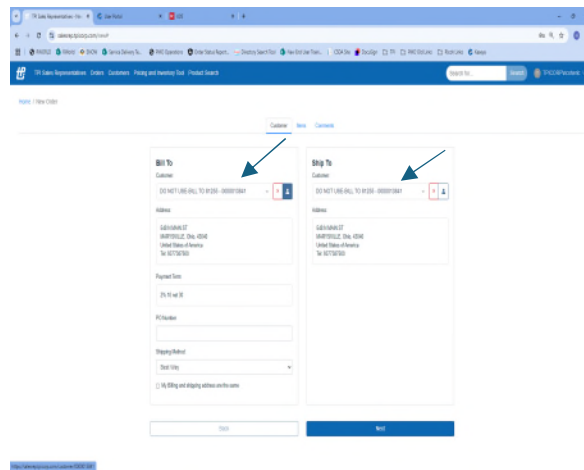   Customer Profile will appear

Option 2:
    Click on Customer Tab
    Select a customer from the list by clicking on the customer number
    Customer Profile will appear
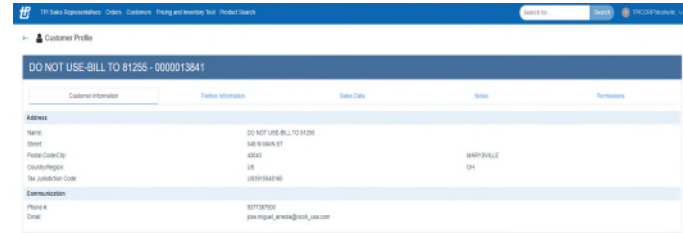

Option 3:
    Click on the Create Order Tab
    Bill To: Select Customer from the Drop Down
    Send To: Select Customer from the Drop Down
    Click on the Person Icon
    Customer Profile will appear

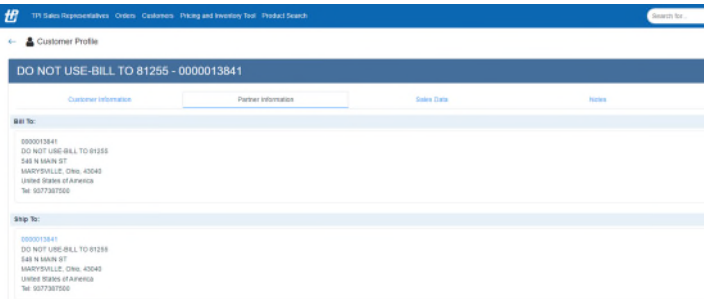## Customer Profile Page

Customer Name and Number appear in the blue bar

Customer Information Tab
    Name
    Business Address
    Tax Jurisdiction Code
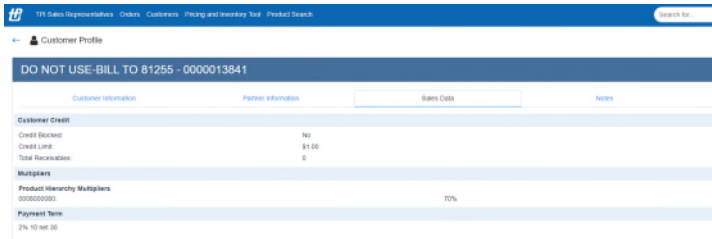   Communication
    Phone Number
    Email

Partner Information
    Bill To Address with Customer Number
    Ship To Address(es) with Customer Number
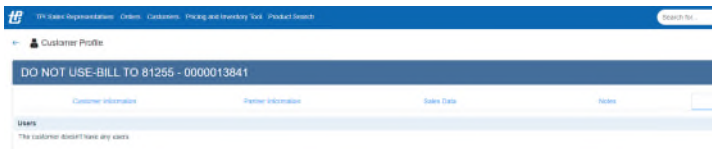
Sales Data:
    Customer Credit
    Multipliers
    Payment Terms
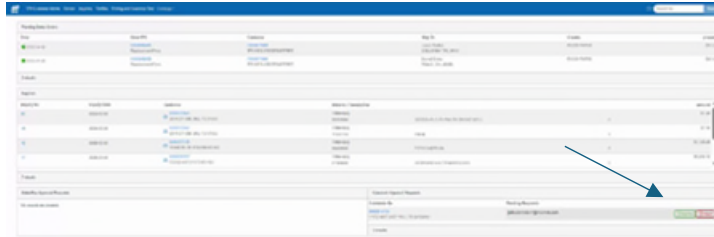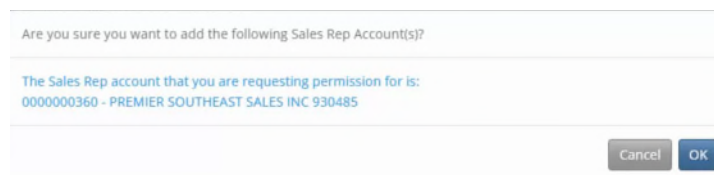
Notes:

Permissions:

Approving Sales Reps and Customers Accounts

On the Home page
Click on Customer Name
Customer Profile will appear

If the Customer is correct
(Customers are being approved by
the Sales Rep and by Customer
Admin. Sales Reps must approve the
customer before Customer Admin
can approve)
    Click Approve
    The confirmation screen appears
    Click OK

If the Sales Rep or Customer is
incorrect
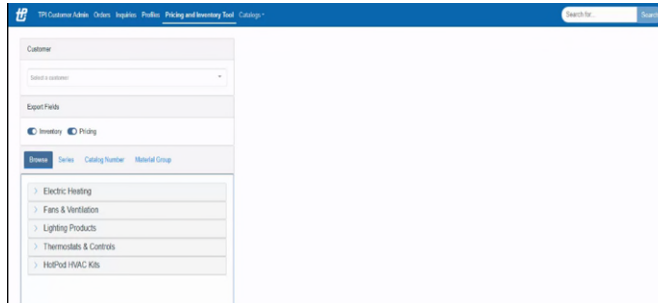   Click Reject
    The confirmation screen appears
    Type in a reason
    Click OK

Pricing and Inventory Tool Tab

Pricing and Inventory Tool Home Page

> Click on the Pricing and Inventory Tool on the Menu Bar
>
> The Pricing and Inventory Tool Opens

Customer Section:
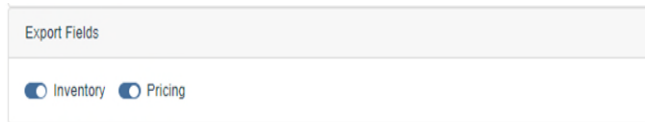   Standard pricing without selecting a customer
  or
    Select a customer from the Drop-Down List

Export Fields:
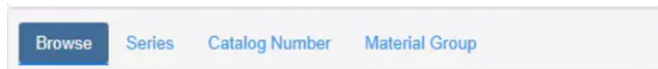   Can be turn on or off which affects what is downloaded from the search

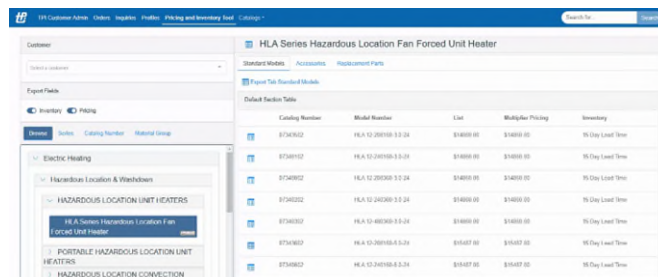4 Options for searching products pricing and information
    Browse by Catalog
    Series
    Catalog Number
    Material Group

Option 1: Browse by Catalog (See Catalog Search for steps by step Instructions)

Click the blue export icon on the left to export from model all the way up to the Category

Option 2: Series
    Type in Series
    Click green magnifying glass
    Pricing tool will return the Series

Click the blue export icon on the left to export the Series
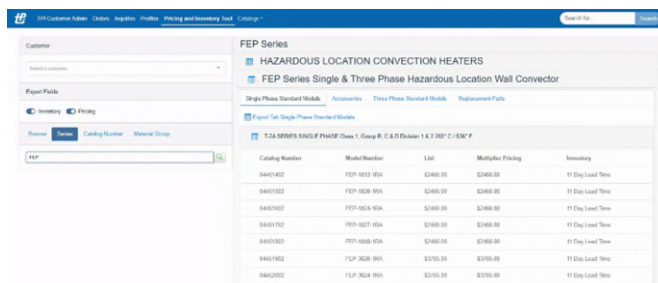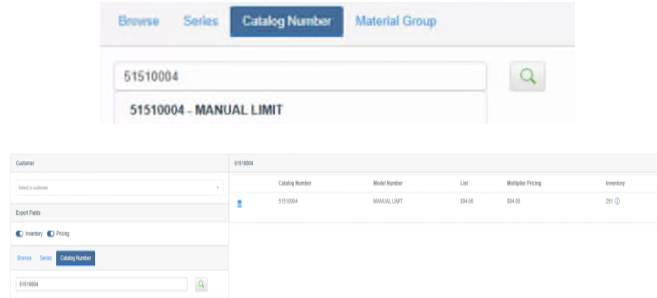
Option 3: Catalog Number
   Type in the Catalog Number
   Click the Catalog Number
   Pricing tool will return the single line

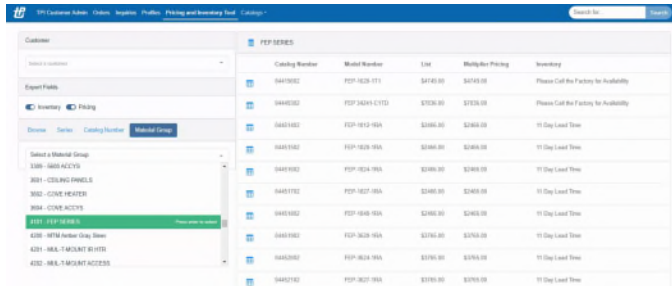Click the blue export icon on the left to export the line

Option 4: Material Group
   Click on the drop-down arrow
   Scroll to or Type the Material Group number
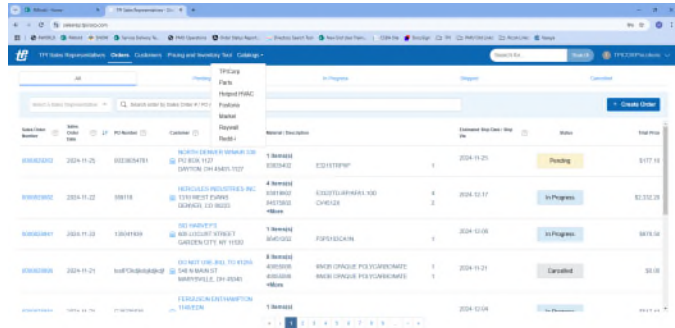   Click on the Material Group Number

Catalog Tabs

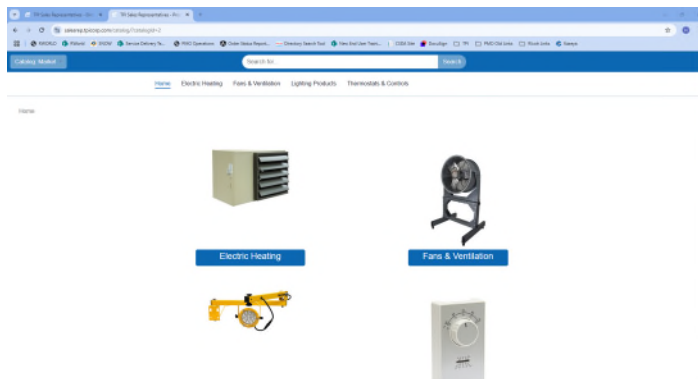Click the Dropdown Arrow Catalog on the Menu Bar
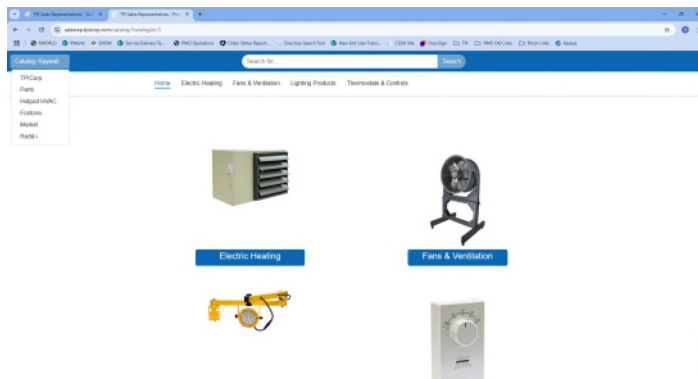
> Click the Catalog that you want to view
>
> The selected Catalog will appear on a new Tab

The selected Catalog will appear on a new Tab

Use the Catalog button located in the upper left corner to switch between catalogs

Model Table are downloadable by
clicking the Download Excel button

Username Dropdown

Click the Dropdown Arrow Catalog on the Menu Bar
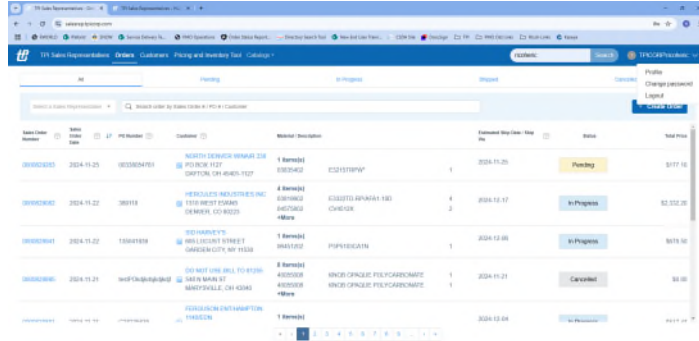
Click on Profile

Edit personal information

External Users

First name
Last name

TPI Network Users

First name
Last name
Email Address

Click the update button to save your changes

Requesting additional Sales Rep Accounts

Click on the Request Permissions

Type in the Sales Rep Number
If more than 1 Click on Add another sales representative additional line will appear

Click Request Permissions button

External User

TPI Network User

Click on Change Password

> Type in your Old Password
>
> Type in your New Password
>
> Type in your New Password to confirm it
>
> Click Update password to complete the process

Click Logout to end your current session