PartnerNet User Guide

January 2014

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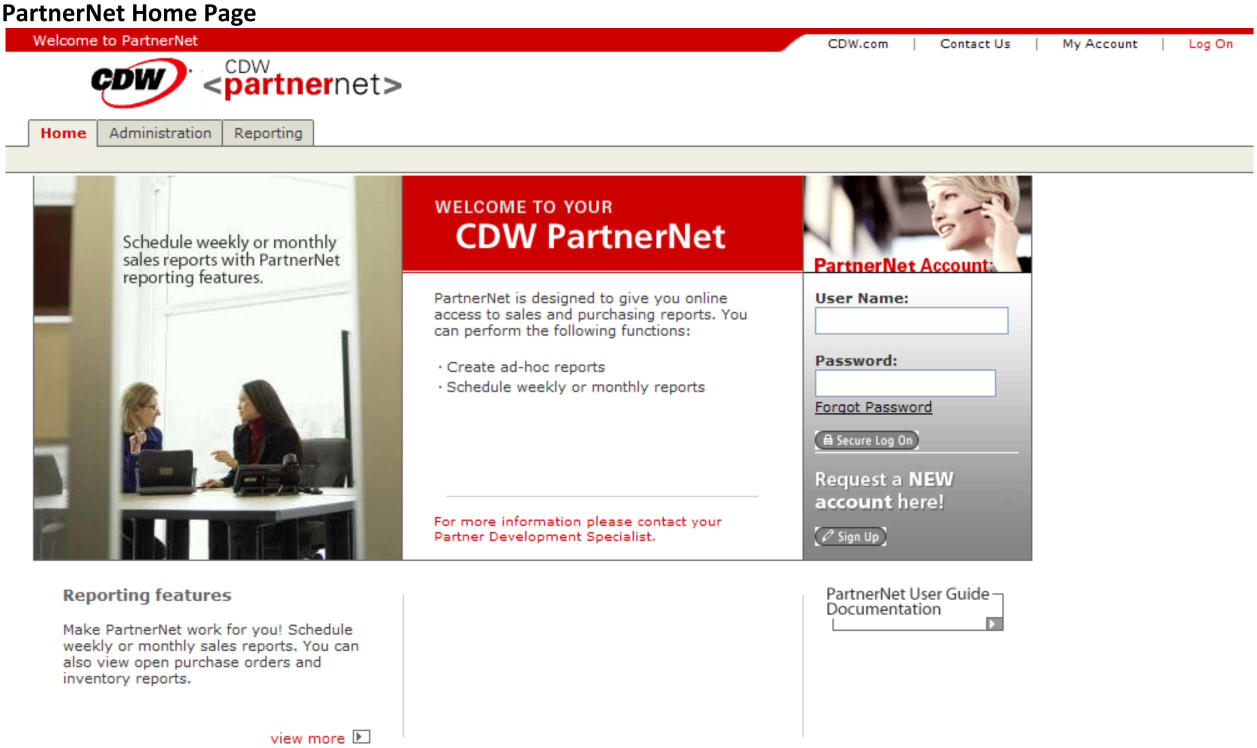
Introduction to PartnerNet

By utilizing PartnerNet, partners can easily view, print, and download 5 different purchasing reports. In the **Reporting** section, a partner has access to a variety of reports that enables them to assess inventory, sales, POS, open quotes, and open purchase orders. These reports run from CDW's Enterprise Data Warehouse and are returned to the partner in either a PDF or Excel (CSV) format via the web browser.

Starting the PartnerNet Application

CDW Partners can access the PartnerNet application from the Internet at http://partnernet.cdw.com. From the PartnerNet Welcome page, a CDW partner can log into the site. If a partner does not have access to PartnerNet, they can request an account by emailing partnerrelations@cdw.com, or by contacting their PartnerNet administrator. The request will be reviewed by CDW personnel that will determine if a User account can be created. The opening screen has general information about the PartnerNet Application and how to contact CDW.

PartnerNet Home Page



The User enters their Username and password and clicks ***Secure Log On*** from the welcome page. The User must agree to the Legal Agreement the first time they log on. This will not appear again after they log on the first time (unless the Legal Agreement has been updated). The User must click the ***Submit*** button, and they will be logged on to the PartnerNet application. Once a User successfully logs on, the PartnerNet home page will display. To return back to the PartnerNet home page from anywhere within the application, the User should click on the PartnerNet logo in the top left hand corner of the screen.

PartnerNet User Types

There are two types of PartnerNet Users:

- PartnerNet User
- PartnerNet Administrator

A **PartnerNet Administrator** is the main point of contact within the partner's organization that has the ability to create and maintain PartnerNet Users and Groups within their organization, as well as assign and restrict User and group rights. CDW Brand Managers can also be added as PartnerNet Administrators. To become a PartnerNet Administrator, please email partnerrelations@cdw.com, or contact your brand's existing PartnerNet Administrator.

A **PartnerNet User** is an employee of the partner and can access limited areas of PartnerNet based on parameters set by their PartnerNet Administrator. A User is anyone the PartnerNet Administrator deems appropriate for accessing PartnerNet. PartnerNet Users are able to maintain and update their personal account information. PartnerNet allows partners an unlimited amount of Users.

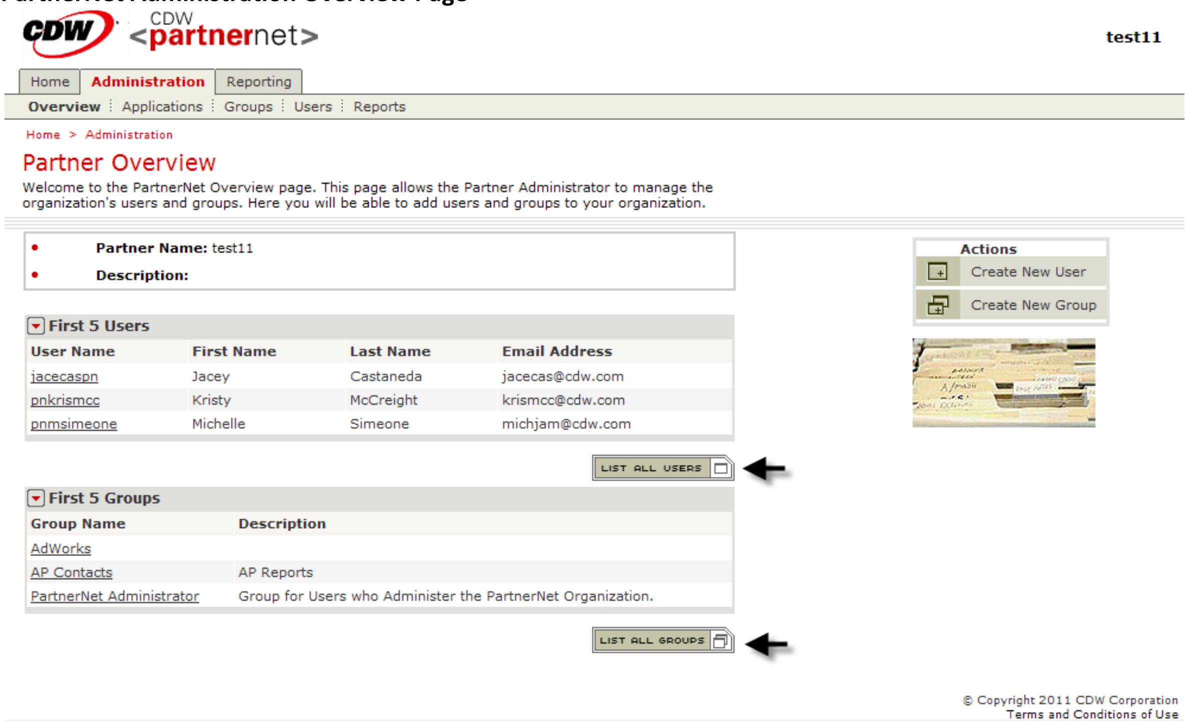
The PartnerNet Application has two sections, **Administration & Reporting**:

- The **Administration** section is for management of the PartnerNet system. Only Partner Administrators have access to the Administration section. In the Administration section, the partner Administrator is able to grant other PartnerNet Users access to their site, as well as determine which reports Users are able to access.
- The **Reporting** section can be accessed by both Users and Administrators, and is for scheduling, viewing, and downloading the available reports. The User selects a report to run, enters the necessary parameters, and queries the report for generation. The report runs from CDW's Enterprise Data Warehouse and will be returned to the partner in either a PDF or Excel (CSV) format via the web browser.

PartnerNet Administration Section

Below you will find the Partner Overview page. The Partner Overview page gives the Administrator the option to change the Partner Information, and lists the first five Users and first five groups. To show all of the Users or groups, click the ***List All*** buttons.

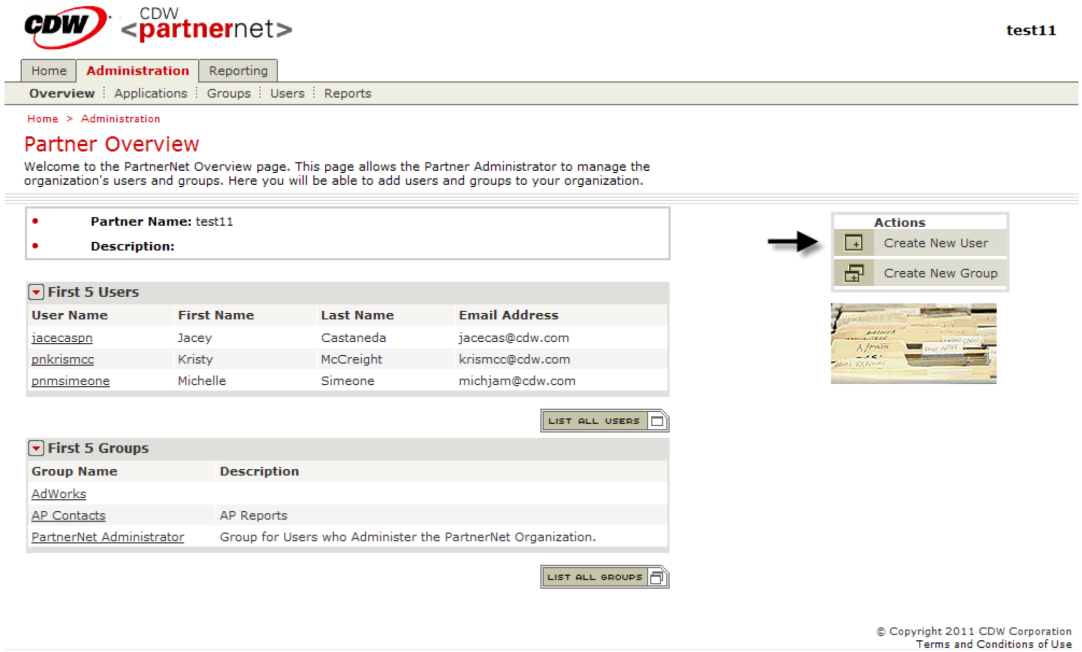
PartnerNet Administration Overview Page



Creating a User/Group

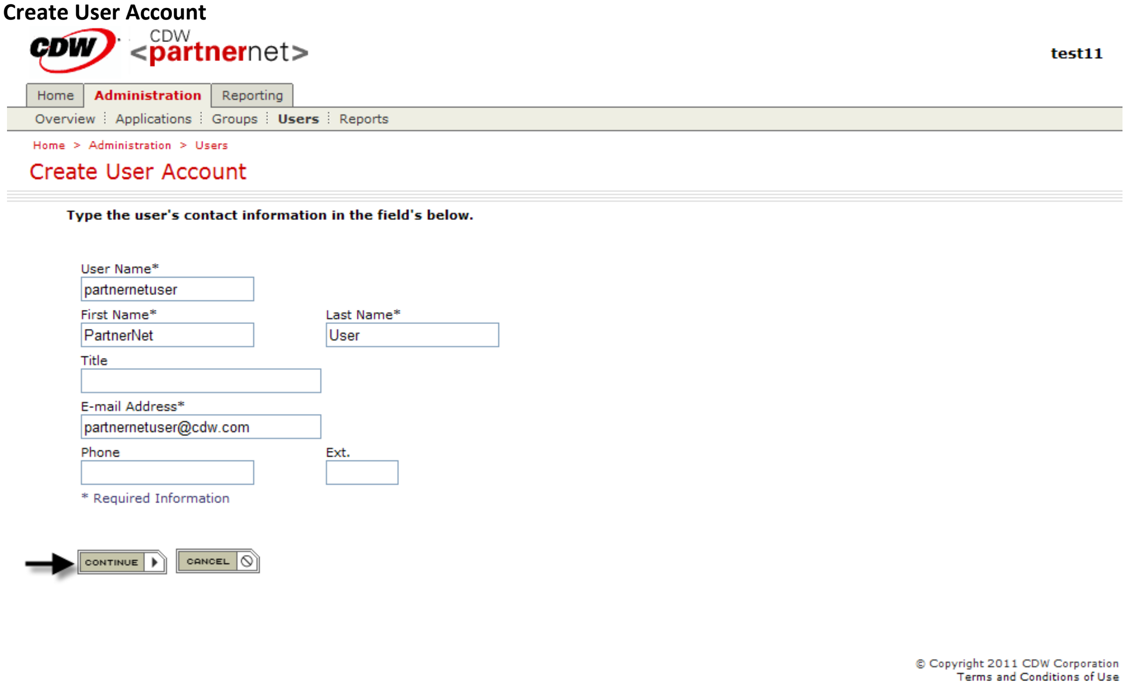
To grant a new User access to PartnerNet, click ***Create New User*** from the Action menu on the right side of the Partner Overview page.

Create New User



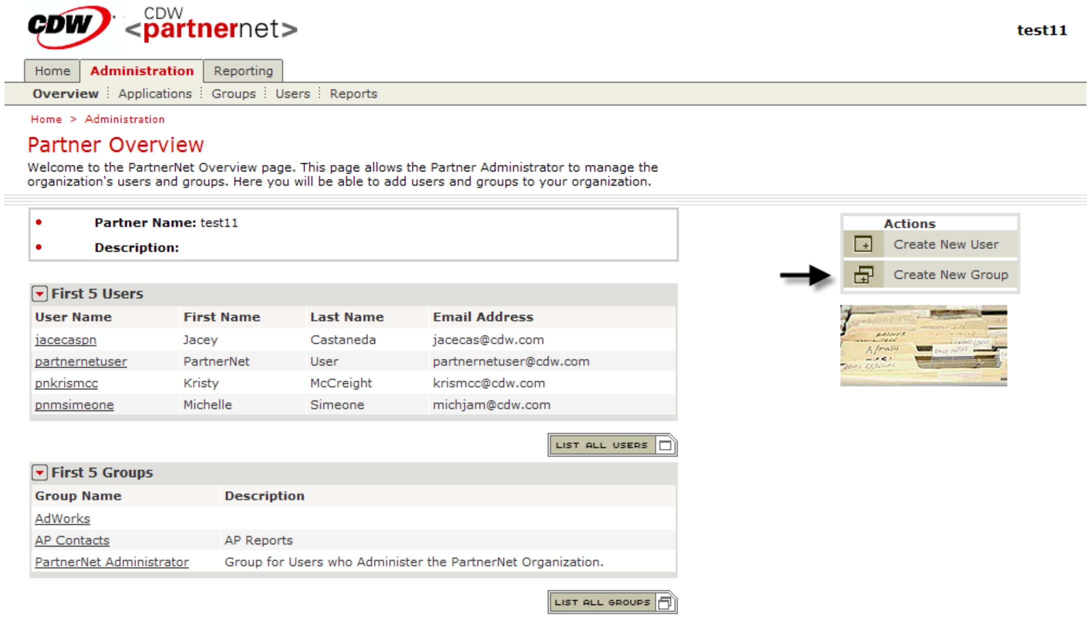
When the **Create User Account** page loads, type in the required information, click ***Continue*** and a new User is created.

Create User Account



In order for a User to be able to access the reporting section, they must be assigned to a group. All Users within a group share the same access rights to PartnerNet. To create a group, click on ***Create New Group*** from the Action menu on the right side of the **Partner Overview** page.

Create New Group

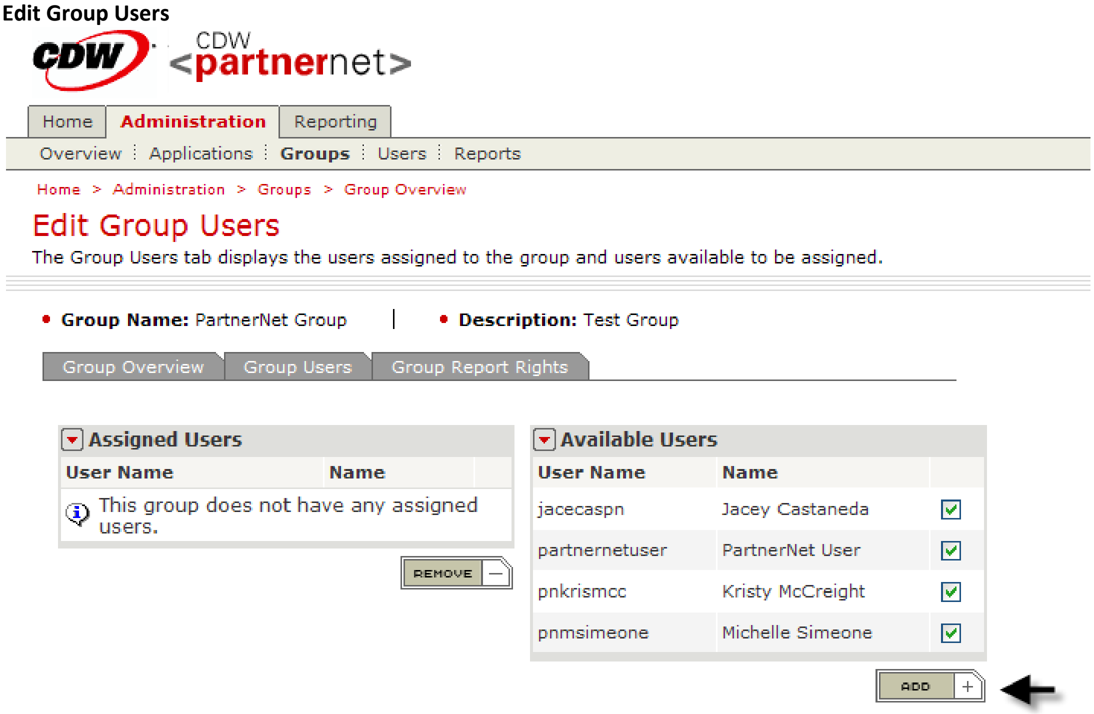


Type in a group name and a group description and click ***Continue***.

Create New Group (figure 2)

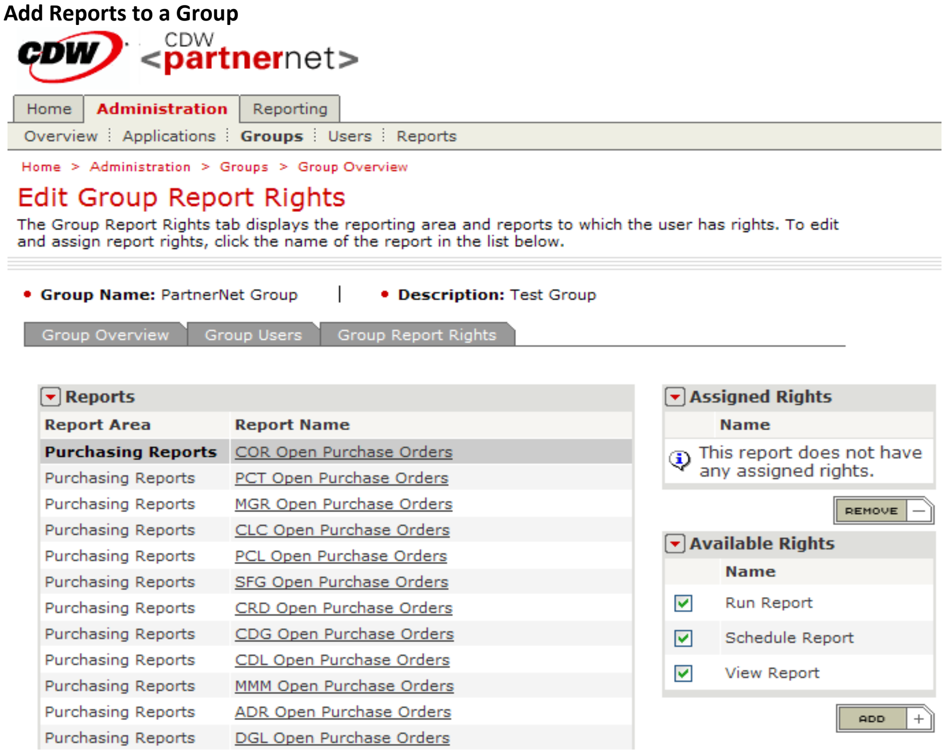
To add Users to a group, click ***Groups*** tab and check the Users to add to the group. Click ***Add***.

Edit Group Users



To add reports to a group, click the ***Groups*** tab and click the ***Group Report Rights*** tab. Click on the report to add, and place checks in Run, Schedule and View. An Administrator can restrict a group to any combination of the three options.

Add Reports to a Group

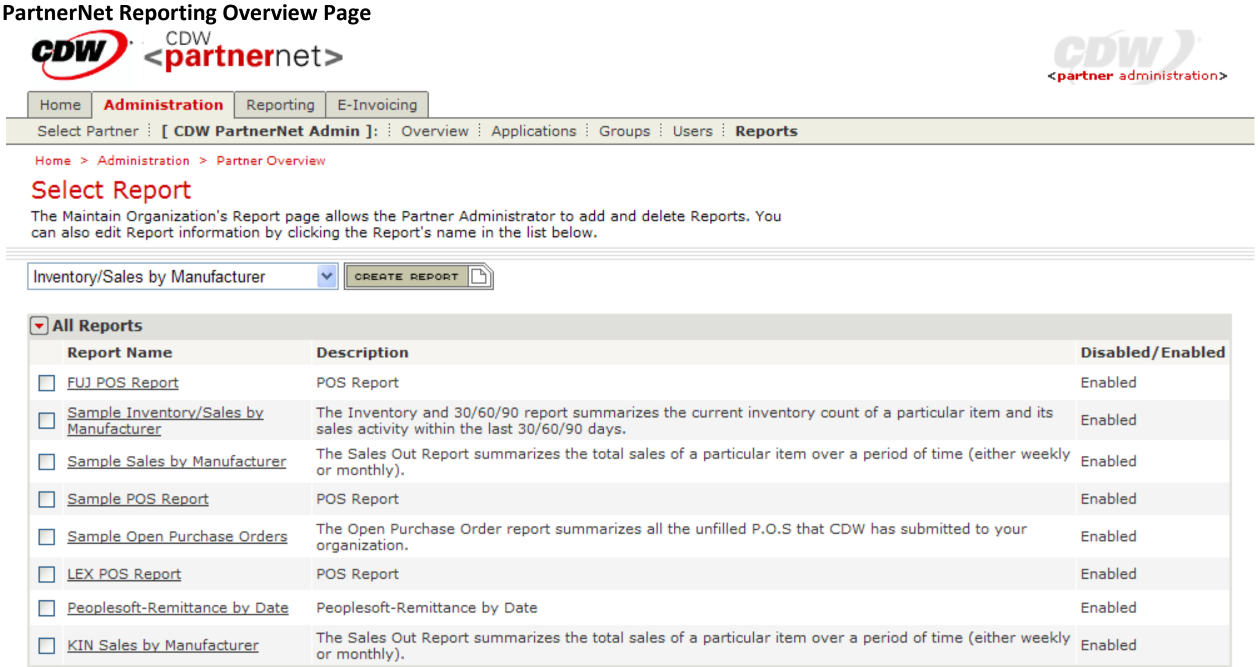


PartnerNet Reporting Section

The Report Overview Page contains **Submitted Reports**, **Reports Available to Run**, and **Current Report Schedules**.

- **Reports Available to Run** is a list of the reports the User can generate as determined by the PartnerNet Administrator.
- **Submitted Reports** lists the reports that are in process or completed. These reports can be viewed, printed, and downloaded.
- **Current Report Schedules** are reports the User has scheduled to run weekly, monthly, or both. See below.

PartnerNet Reporting Overview Page



Reports Available to Run

Based on User rights granted by the PartnerNet Administrator and CDW, there are five types of reports available:

- Inventory/Sales by Manufacturer
- Point-of-Sales (POS)
- Sales by Manufacturer
- Open Purchase Orders
- Open Quote

Inventory/Sales by Manufacturer

The Inventory and 30/60/90 report summarizes the current inventory count of a particular item and its sales activity within the last 30/60/90 days. This report includes the following information:

- Manufacturer Description and Code
- CDW Item Code (EDC)
- Sold in (Country)
- CDW Item Rank (an internal code assigned by CDW ranking an item within CDW inventory)
- Manufacturer Part Number
- CDW Item Description
- Vendor Returns
- Open Purchase
- On Hand
- Logistics Standard Cost
- On Hand – COGS
- Open Sales Order
- CDW Item of Days Supply (a calculated number based on historical sales and inventory levels that determines the number of days of supply that CDW has on hand)
- Sales History – Month to Date
- Sales History Quantity – Trailing 30 Days
- Sales History Quantity – Trailing 60 Days
- Sales History Quantity – Trailing 90 Days

Inventory/Sales by Manufacturer (figure 1)

CDW Corporation

Inventory and Sales Report

Selection Criteria: **Effective Date: 12/31/2010**

Manufacturer Code: Mfg Code **Manufacturer Combinati**

CDW Mfg Code	Manufacturer Description	CDW Item Code	Sold in	CDW Item Rank	Mfg Part Number	CDW Item Description
CDW Mfg CD	CDW Manufacturer Description	1692077	US	C3	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	713052	CA	-	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	634508	CA	-	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	1082335	CA	-	Mfg Part #	CDW description of Part

Inventory/Sales by Manufacturer (figure 2)

Vendor Returns Qty	Open Purchase Qty	Qty On Hand	Logistics Standard Cost	On Hand Cost of Goods	Open Sales Order Qty	CDW Item Days of Suppy	Sales History - MTD	Sales History Quantity - T30D	Sales History Quantity - T60D	Sales History Quantity - T90D
	2		.	.						
			.	.	3					
	6		.	.						
	1		.	.						

Point-of-Sales (POS) Reports

The POS report includes the following information:

- Company
- Invoice
- Invoice Date
- Order
- EDC
- Customer
- Bill to Customer
- Ship to Customer
- Shipped to Customer
- Bill to City
- Ship to City
- Manufacturer Code
- Bill to State
- Ship to State
- Manufacturer Part Number
- Bill to Postal Code
- Ship to Postal Code
- Bid Desk Rebate
- Sales Segment/AM Location
- EDC Description
- Agency
- Quantity
- Logistics Standard Cost

Point-of-Sales (figure 1)

CDW Corporation

Point of Sales Invoice Report

From Invoice Date: 12/01/2010 To 12/15/2010

Manufacturer Code: CDW Mfg Cd **Manufacturer Combinations: No** Segment: ALL

						------------------ Billed To ------------------		
Company	Invoice	Invoice Date	Order	EDC	Customer	Customer	City	State
CDW Direct	VRZ9245	12/01/2010	WCR5075	1213090	1880144	Billed to Customer Name	RACINE	WI
	VSX1721	12/06/2010	1B3MJYK	1213090	1780937	Billed to Customer Name	GLENVIEW	IL
	VTX8202	12/10/2010	1B3RGGH	1213090	9367353	Billed to Customer Name	SUNNYVALE	CA
	VSC4840	12/01/2010	1B3LXC2	1673938	2456046	Billed to Customer Name	MUSKEGON HEIGHTS	MI

Point-of-Sales (figure 2)

------------------ Shipped To ------------------						
Customer	City	State	Postal Code	Mfg Code	Mfg Part #	EDC Description
Shipped to Customer Name	STURTEVANT	WI	53177	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	DEWITT	IA	52742	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	SUNNYVALE	CA	94089-1323	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	MUSKEGON HEIGHTS	MI	49444-0348	CDW Mfg Code	Mfg Part Number	CDW description of the Part

Point-of-Sales (figure 3)

Trans Type	Bid Desk Rebate	Logistics Standard Cost	Sales Segment	Agency	AM Location
Invoice		1,163.16	Medium Large Business		Chicago-Riverside (CH120)
Return		-1,163.16	Medium Large Business		Woodland Falls (WF)
Invoice		1,163.16	Small Business		Chicago-Riverside (CH120)
Invoice		3,580.02	Small Business		Woodland Falls (WF)

Sales by Manufacturer

The Sales Out Report summarizes the total sales of a particular item over a period of time (either weekly or monthly). This report includes the following information:

- Manufacturer Description
- EDC Code
- Manufacturer Part Number
- Item Description
- PGM
- Class
- Type
- Drop Ship
- Quantity Sold
- Logistics Standard Cost
- Sales Out Invoice Dollars

Sales by Manufacturer (figure 1)

CDW Corporation

Sales by Manufacturer Report

SSRS-PM-PNN002

Selection Criteria: From Invoice Date: 02/01/2011 to 02/04/2011 Company Code:

Manufacturer: CDW MfgCD Mfg Combinations: No Product Type/Class/Group: ALL/ALL/ALL

Manufacturer Description	EDC Code	Manufacturer's Part#	Item Description	PGMJ
CDW Manufacturer Description	1706600	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1213090	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1213105	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1319744	Manufacturer's Part#	CDW description of the Part	Product Group Description

Sales by Manufacturer (figure 2)

Class	Type	Drop Ship	Quantity Sold	Logistics Standard Cost	Sales Out Invoice Dollars
Printer Memory Upgrades (PM)	Memory/System Components (U)		10	4,724.50	473.58
Laser/LED Printers (LP)	Printers (P)		1	1,101.78	1,269.77
Laser/LED Printers (LP)	Printers (P)	Y	2	2,712.52	3,015.88
Dot Matrix Printers (DP)	Printers (P)		13	4,015.31	4,563.47

Open Purchase Orders

The Open Purchase Order report summarizes all the unfilled purchase orders that CDW has submitted to your organization. This report includes the following information:

- Purchase Order Number
- Type
- Drop Ship
- Order Date
- Aging Day (number of days since PO was placed)
- Due Date
- EDC
- CDW Item Rank (an internal code assigned by CDW ranking an item within CDW inventory)
- Manufacturer Part Number
- Description
- Ordered
- Open
- Unit Cost
- Open Value

Open Purchase Orders (figure 1)

CDW

CDW Corporation

Open Purchase Orders by Manufacturer/Supplier

Requesting Manufacturer

	PO#	Type	Drop Ship	Order Date	Aging Day	Due Date	EDC	CDW Item
Suppliers Code and Name								
	HSR8972	F	Y	2/2/2011	13	2/14/2011	1521945	DX
	HSM2392			1/31/2011	15	2/15/2011	1630616	B2
	HSM2392			1/31/2011	15	2/15/2011	2164995	A3
	HSY0773			2/4/2011	11	2/21/2011	1727536	B2

Open Purchase Orders (figure 2)

Mfg Part #	Description	Ordered	Open	Unit Cost	Open Value
Mfg Part Number	CDW description of Part	1	1	12,030.0	12,030.0
Mfg Part Number	CDW description of Part	2	2	2,449.30	4,898.60
Mfg Part Number	CDW description of Part	10	10	367.50	3,675.0
Mfg Part Number	CDW description of Part	1	1	5,477.50	5,477.50

Open Quote

The Open Quote report includes the following information:

- Manufacturer Code
- Manufacturer Description
- Quote Number
- Quote Date
- Customer
- Item EDC
- Manufacturer Part Number
- Item Description
- Sales Segment
- Quantity on Quote
- Account Manager
- Sales Out Quote Dollars
- Account Manager Email Address
- State
- Account Manager Direct Phone

Open Quote (figure 1)

CDW Corporation

Open Quotes Report

From Invoice Date: 01/01/2011 To 01/19/2011

CDW Quotes are normally closed after 90 days

Manufacturer Code: Mfg Code   Manufacturer Combinations: No   Segment:

Mfg Code	Mfg Description	Quote	Quote Date	Customer	Item	Mfg Part Number	Item Description
Mfg CD	CDW Manufacturer Description	BWQD589	01/03/2011	CDW Customer Requesting Quote	1833214	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1726782	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1726015	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1858531	Mfg Part Number	CDW Description of the Part

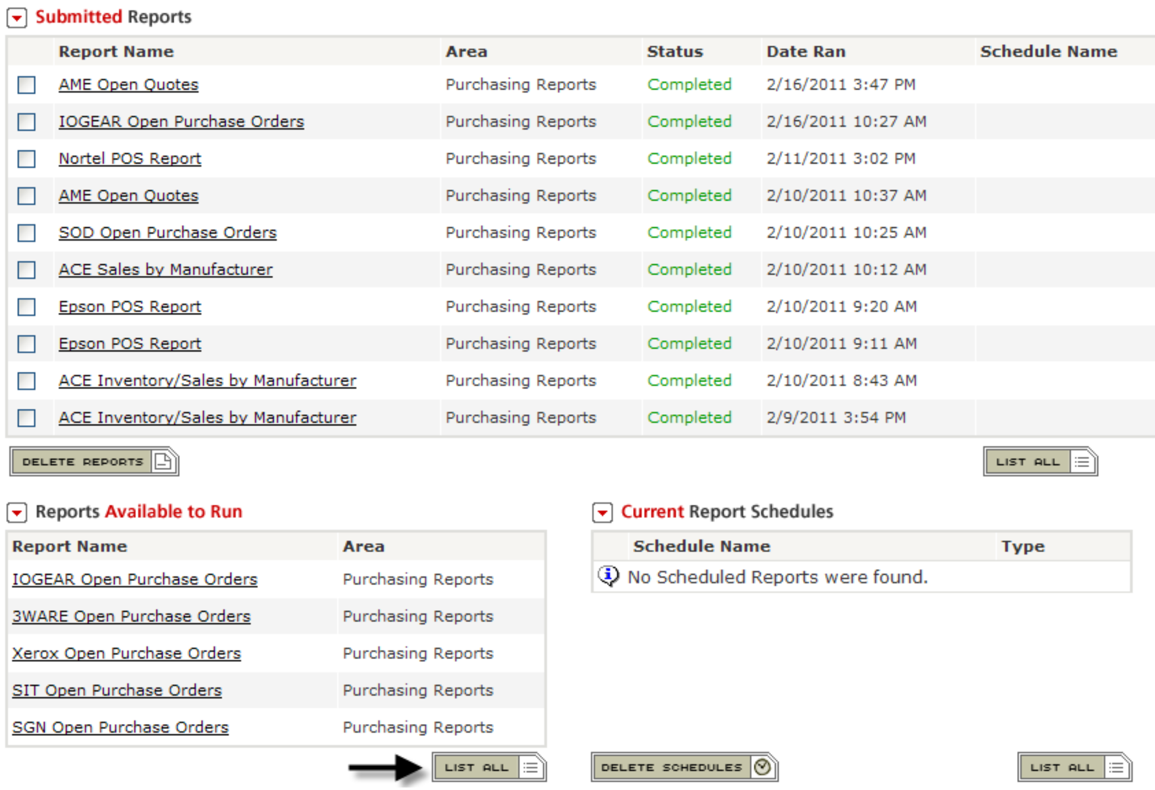
Open Quote (figure 2)

Qty on Quote	Sales Out Quote Dollars	Sales Segment	State	Account Manager	Acct Mgr Email	Direct Phone
1	392.96	Medium Large Business	TX	BRIAN HOEKSTRA (8750)	briahoe@cdw.com	(312) 705-6934
1	127.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354
1	130.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354
1	490.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354

Creating and Scheduling Reports

To schedule a report to run on a weekly or monthly basis, click the ***List All*** in the **Reports Available to Run** section of the **Reporting Overview** tab.

Reports Available to Run



Submitted Reports

	Report Name	Area	Status	Date Ran	Schedule Name
☐	AME Open Quotes	Purchasing Reports	Completed	2/16/2011 3:47 PM	
☐	IOGEAR Open Purchase Orders	Purchasing Reports	Completed	2/16/2011 10:27 AM	
☐	Nortel POS Report	Purchasing Reports	Completed	2/11/2011 3:02 PM	
☐	AME Open Quotes	Purchasing Reports	Completed	2/10/2011 10:37 AM	
☐	SOD Open Purchase Orders	Purchasing Reports	Completed	2/10/2011 10:25 AM	
☐	ACE Sales by Manufacturer	Purchasing Reports	Completed	2/10/2011 10:12 AM	
☐	Epson POS Report	Purchasing Reports	Completed	2/10/2011 9:20 AM	
☐	Epson POS Report	Purchasing Reports	Completed	2/10/2011 9:11 AM	
☐	ACE Inventory/Sales by Manufacturer	Purchasing Reports	Completed	2/10/2011 8:43 AM	
☐	ACE Inventory/Sales by Manufacturer	Purchasing Reports	Completed	2/9/2011 3:54 PM	

DELETE REPORTS   LIST ALL

Reports Available to Run

Report Name	Area
IOGEAR Open Purchase Orders	Purchasing Reports
3WARE Open Purchase Orders	Purchasing Reports
Xerox Open Purchase Orders	Purchasing Reports
SIT Open Purchase Orders	Purchasing Reports
SGN Open Purchase Orders	Purchasing Reports

LIST ALL

Current Report Schedules

Schedule Name	Type
No Scheduled Reports were found.	

DELETE SCHEDULES   LIST ALL

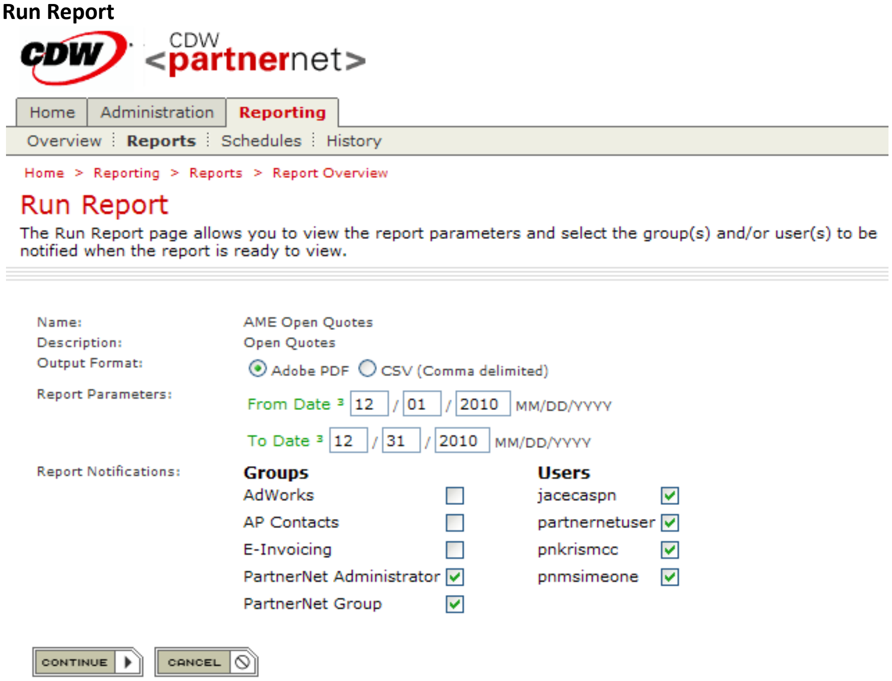
Select your report from the list. On the right hand side of the **Report Details** page, it allows you to run or schedule a report.

Run or Schedule a Report

To run the report, click the ***Run Report*** icon. The **Run Report** page provides the name and description of the report. You may also select the Output Format – either Excel CSV or Adobe PDF. (**Note**: If running the POS report, the output format selected *must* be CSV. Any other reports can be run either in CSV or PDF.) Enter any **Report**

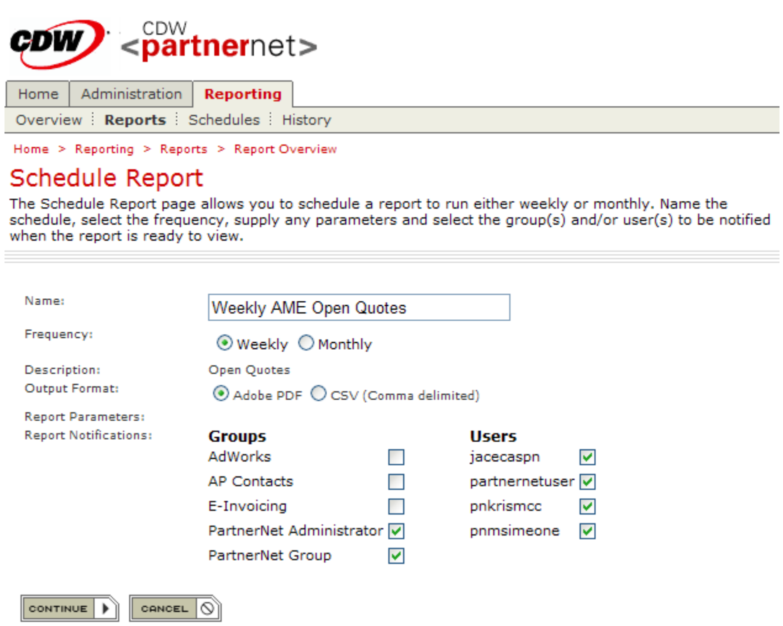
Parameters, if necessary. Below that is **Report Notifications**, which allows the User to set an e-mail alert to be sent to the recipient(s) when a report has completed processing. This eliminates the need for the User to continue logging-on to see if a report is ready for viewing, printing, or downloading. Place a check mark next to the User(s) if notification is desired and click ***Continue***. The report name will now display in the **Submitted Reports** section and the status will be **Pending Processing Request**. After the report has been processed, the report status is **Completed** and notifications, if set up, are sent.

Run Report



To schedule a report, select ***Schedule Report*** from the Actions menu on the right side of the **Report Overview** page. Enter the frequency of the report (weekly or monthly) and other all necessary details on the Schedule Report page. When finished, click ***Continue*** and the report is scheduled.

Schedule Report



The scheduled report will be listed on the Reporting Overview page under Scheduled Reports. To change any settings on the report, click on the scheduled report.

A report can be scheduled weekly, monthly, or both. Weekly reports are run on Mondays and monthly reports are run on the first business day of each month. To schedule the same report to be run both weekly and monthly, create two schedules to run the report – one schedule for weekly and one schedule for monthly.

View, Print, and Download Reports

Once a report is complete, the User can view, print, or download the report from the PartnerNet application. From the **Report Overview** page, click the report listed in ***Submitted Reports***. If the report is not listed, click ***List All*** to see a full listing of the completed reports. Clicking on the report will display the Report Output page. The status and information about the report is shown along with buttons for downloading, viewing, and printing the report. To view or print the report, the User needs to click the ***View/Print Report*** button (only appears if the report format is Adobe PDF). The report will load in Adobe Acrobat Reader. From here, the User can view and print the report. To download the report, click the ***Download Report*** button (either PDF or CSV format). This will prompt the User to either save it or open it from its current location.

New Password Functionality

New password requirements have gone into effect on PartnerNet as part of an ongoing effort to ensure the security of our online data. All PartnerNet Users were required to change their passwords to comply with the below password updates:

New Password Requirements	Old Password Requirements
• Passwords are <u>case sensitive</u> • Must be a minimum of 6 characters • Must be different from your User name • Must contain at least one letter and one number • May contain symbols (&,*,etc.), but not spaces	• Passwords must include at least 4 characters and may not include spaces or be the same as the User name. • Passwords are case-sensitive.

In addition to the new requirements, PartnerNet Users are now able to reset their own passwords via the Forgot Password link below the Password field when logging in to PartnerNet. Users will receive an email confirming the change. A secret question/answer is no longer required.