FLUKE® Distributor Ordering System

User Manual for FDOS

Fluke Distributor Ordering System

Price & availability	Create a quote	Order items
Search or upload items	Fill out order fields	Submit an order or download a quote
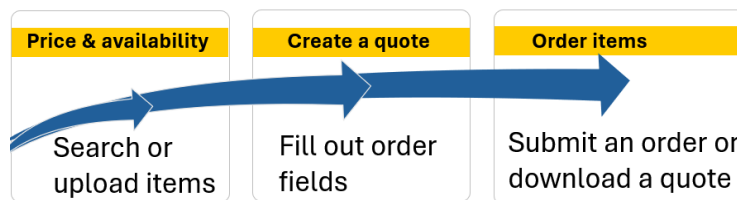
Quick Links

Access FDOS	.CSV/Bulk Upload	Search function
Cancel Order	Freight Terms	Transaction Tracking/Reporting
Create a Quote/Order	Return Materials [RMA]	User Profile Setup
Retrieve a Quote		

Gain access to FDOS from within the distributor portal:

• View the 3-minute registration video

• Or use our Quick Start Guide

• Please allow 1-2 business days to receive the initial FDOS approval email

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A. Log in to the Distributor Portal & request access to the FDOS

To use the Quick Start Guide to access the portal, click here to download: Quick Start Guide. Or simply follow the instructions below.

First time registration for Distributor Portal

A. **The first time only**, please clear your browser history, then close and reopen your browser. This is to set the geolocation, which only needs to be done once.
B. After clearing browser history, go to www.fluke.com and select Fluke Corporation

C. Select the region '*Americas*'.
D. From the home page, find the *My Account* icon in the top right corner and click on it.
E. Select *Register*.
F. Follow the process on the *Sign In* screen by selecting *Register Now*, entering your work email, and requesting a verification code.
G. The verification code will come in moments and will allow you to verify your work email.
H. On the *Create your Fluke account* screen, pay special attention to the question at the bottom "*Are you a Fluke authorized distributor*" – select *Yes*. Ensure you fill out all other fields as well. Please make sure you fill in your corporate email information – not your personal email.

The above registration to the distributor portal only needs to be done once.

Requesting access to FDOS (My orders)

To registering an account in FDOS (our distributor store), go to *My orders* tile inside the Distributor Portal and click *Request Access*.
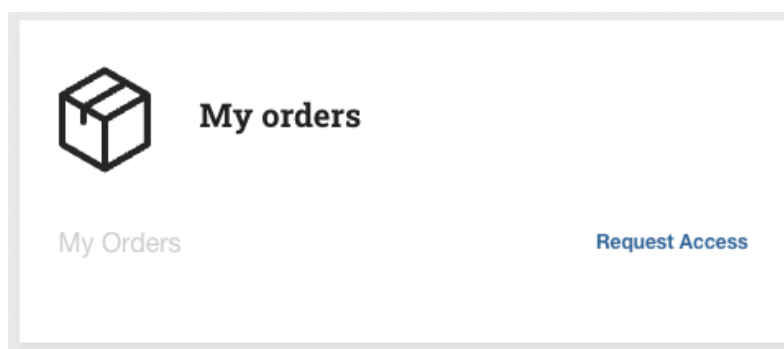
When you request access, you will see the below form:
- You are requesting access to the *My Order* tile (FDOS) so select that box.
- *Company name* and *Existing Customer Number* can be provided by Order Management team or can be found on any Fluke-generated customer document you might have receive (such as an invoice).
- Select *Submit*.

Upon completion of your registration request:
- You will receive a *Welcome to FDOS - Your Registration has been forwarded for Approval* email.
  - It normally takes a few hours to a few days to receive this welcome email as, behind the scenes, we are determining your level of access.
  - This approval is something that you will only do once.
- After approval, you will receive an email *FDOS Registration Approval Status*. From that point on, you can place orders in FDOS, and the tile will look like this:
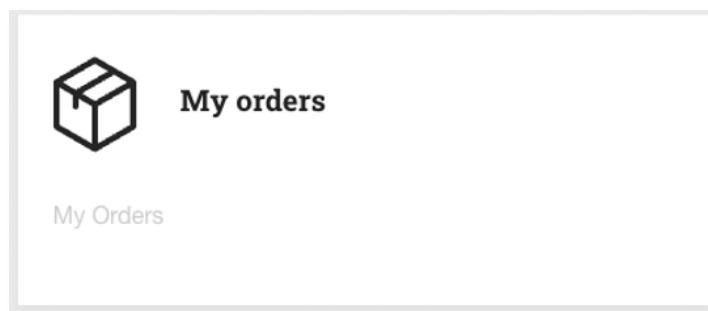
Once registration is complete, your FDOS tile will allow you to log in any time you access the Distributor Portal

Access Levels

The FDOS has user-level permissions for added security as described in the below chart. The functions that appear in the left side navigation panel vary by your level of permission.

	Level 1	Level 2	Level 3
Order Tracking Logistics	●	●	●
Email Documents	LIMITED	●	●
Create Quotes	-	●	●
Retrieve Quote	-	●	●
Create & Submit an Order	-	-	●
RMA Requests	●	●	●
Short Shipments Requests	●	●	●

General differences between access levels:
- Level 1 access allows users to see tracking and schedule ship dates only.
  Price & Availability searches are not accessible to Level 1 users.
- Level 2 access adds to Level 1 the ability to Create Quotes and see Distributor Net pricing.
- Level 3 access adds to Level 2 the ability to submit Purchase Orders.

B. Set up your profile defaults

To log into FDOS, go to Fluke.com and select *My Account* or go to the Distributor Portal if you have it bookmarked.

First, set your defaults

Setting default billing and shipping addresses is necessary to unlock the menu items.
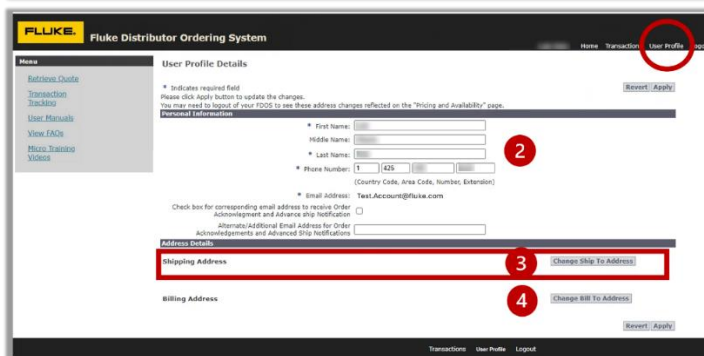To set these defaults:

Initially, your screen shows that default billing and shipping are missing.

1. Click **User Profile** in the top right corner.
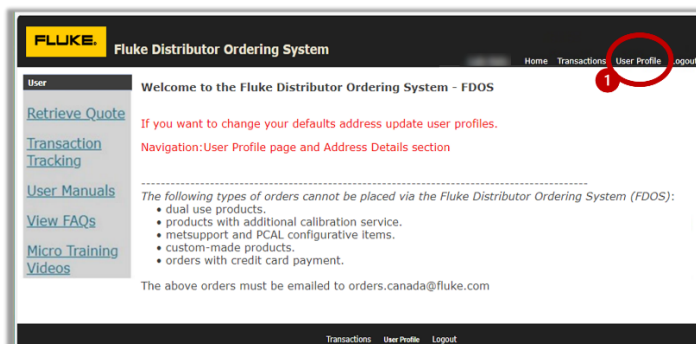
From the **User Profile** screen:

2. [Optional] In **Personal Information**, you can add additional emails if desired.

3. First, click the button **Change Ship To Address** [3]. Afterwards, you will change your Bill To Address [4].

1. In the **Search and Select: Ship to Address** field, you see a country search field. Select your country and press **Go**.

2. For U.S. addresses, additionally type in your state **as a two-letter value** and press **Go.**

3. From the **Results** column, select from the available addresses by clicking the radio button.
   Note: if you want a different address than what shows or if you are not sure which address to choose, contact distribution.orders@fluke.com

4. To finish, press **Select** at the bottom of the interface.
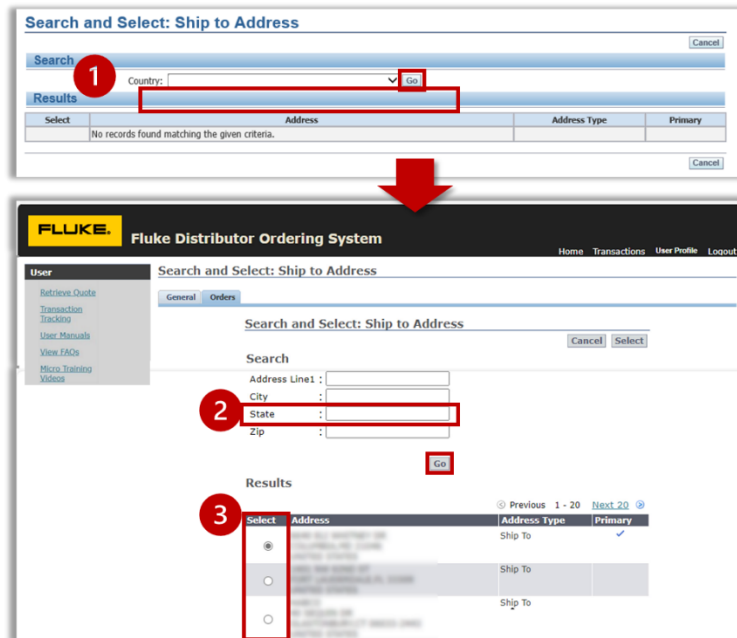
Note: You must repeat the above steps to **set your default Billing** address.

Once both addresses are selected, you will see both appear in your *Order Preferences*. Before you start ordering, click **Apply**. This will save your address settings.

After clicking **Apply**, you will see a confirmation in red:
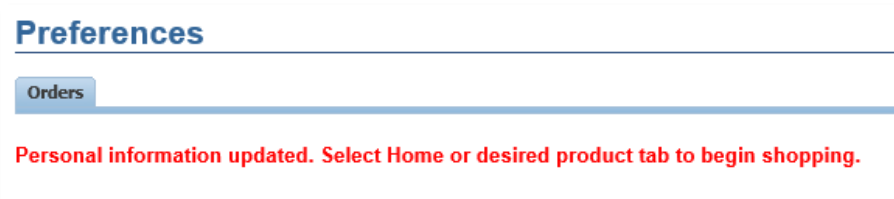
C. Search function – for pricing/availability & for orders/quotes creation

The search function populates the *product grid* at the bottom of main interface.

The *product grid* can be used to check price/availability as well as to create a list of products for an order or a quote. It is also the place where you can find lead times. The ATP field (available-to-promise) shows approximately how long it will take to receive the order once it is booked, so you can determine lead times.

Note: CSV upload (Excel) is an alternate way to create a price or order list and is very fast – see the section on CSV Upload for more information.

From the **Pricing and Availability** page

1. To search for an item, click any magnifying glass icon next to any row of the product grid (line number).

2. In the new window, search for an item with either the Item #, Model Noun (name) or description of the item (see best practices below).

3. Click **Search** to populate the results.
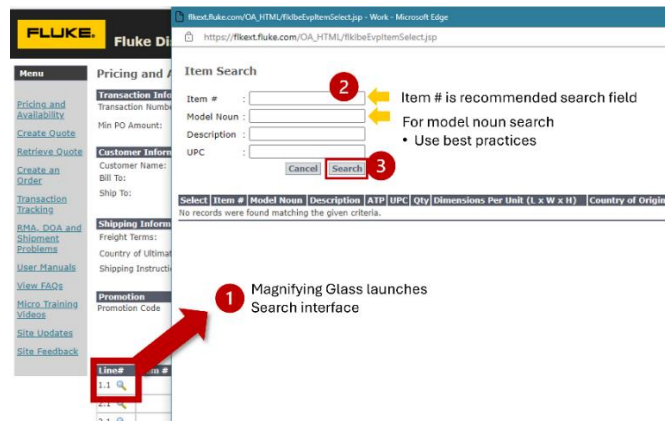
1. Here, we have searched for Fluke-971 and already clicked the **Search** button.
2. Once we select the radio button next to the item, it automatically gets placed into the product grid.
3. *Note:* The **ATP** field shows lead time (available to promise).
4. The product grid populates with many other factors. Pricing is now listed, including list price, net price, discount and extended net price to show total line value.
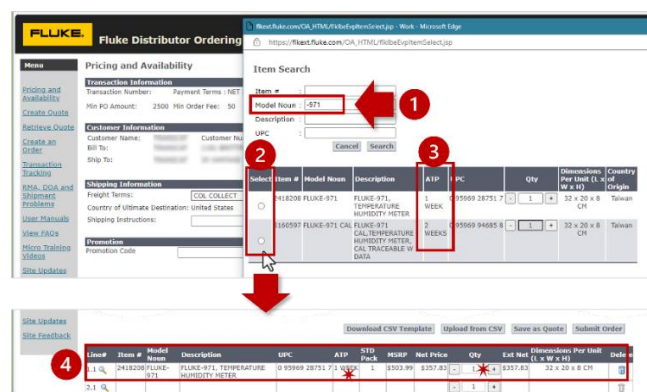
*Quantity/QTY – changing the number of items in this field automatically adjusts the amount.

Search Best Practices:

Since the search function of FDOS pulls from other corporate databases, it can often take a few seconds to return results.
- For maximum efficiency and speed, **search by Item #** or **UPC #.**
- When searching by **Model noun**: Omit the word *Fluke* or *FLK* but **include a hyphen** in front. This will maximize the search engine capabilities.
  - *Example*: if searching for the Fluke-87-5, simply enter **-87-5** in the Model Noun search field.
  - *Notice*: if using the *item number* for that same search, your response is in milliseconds. You can test this with a search for item#: 2074974).

D. Create a quote or an order

The FDOS can be used by authorized distributors of Fluke Industrial, Fluke Calibration, and Fluke Networks. You may order only from the product portfolios which your Fluke contract allows you to order. These are defined on the price lists sent to your company.

- *Note:* Your ability to create a quote or an order varies by your level of access. See chart above.

Some types of orders cannot be placed through the FDOS, but can be place through Order Management at *distribution.orders@fluke.com*:

- products with additional calibration service
- custom-made products
- special payment terms or special shipping agreements
- products requiring special additional information at time of ordering (e.g. products requiring local gravity values).

Part One – Steps in common for Quotes and Orders

The first steps for creating either a quote or an order are the same in FDOS.

- First, fill out your product grid as described above in section C. Search Function.
  Note: You can fill out the product grid all at once through .csv (Excel) upload described in section G.

- Whether you are still on the **Pricing and Availability page**, on the **Create Quote page**, or on the **Create an order page**, you will see four informational fields to work in: transaction, customer, shipping, and the product grid:

Perform these steps to create either a quote or an order – refer to the numbers in the picture above.

1. **Transaction information** section – Check your terms here.
   Note: To save your work as a valid quote or a valid order, you must enter your own company purchase order number or reference number in the field titled **Cust PO/Ref** #.

2. **Customer information** section – Review this. Here is another opportunity to change your **Bill To** and **Ship To** if they are not correct.

3. **Shipping information** section – make updates as needed:
   a. Some **Freight Terms** require additional information. The drop-down menu contains the following fields and requirements:
      o PPA PREPAY & ADD – You select your shipping method, and the calculated amount is added to your Fluke invoice.
      o TPB THIRD PARTY BILLING – Fill out the **Account #** of your freight carrier and select your freight carrier from the **Shipping Method** drop down menu. Your freight charges will involve you and your freight carrier.
      This is only an option for domestic distributors (not for international).
      o COL COLLECT – Fill out the **Account #** of your freight carrier and select your freight carrier from the **Shipping Method** drop down menu. Since we are shipping using your shipping account, freight charges do not involve Fluke.
      International distributors must use this shipping option.
   b. The box **Partial Shipment Allowed** – leave this checked if you want the items that are ready first to ship, even if the remaining items are not yet ready. Deselect it if not.
   c. **Shipping instructions** – this is a free text field to enter any shipping instructions needed for the order

4. **Promotion** section – If the order or quote qualifies for a Fluke promotion, enter the promo code and click **Apply.** The product grid will update to show the impact of the code on prices.

5. **Product grid** section – ensure the **Qty** column is accurate, and all items are included.
   Note: Standard packs for some items are more than just one item (such as with the Fluke-62MAX). In these cases, since the product can only be ordered in multiples, the product grid only allows you to increment in those multiples. This ensures an accurate order.

6. Lastly, click the button either **Save as Quote** or **Submit Order**.
   a. If you elect **Save as Quote**, you will get a warning tip followed by a congratulations message.

   Your quote will reopen in a transaction details view where you will have options to convert to order, copy quotation or email quote.

This is a view of what you see when a quoted has been saved, and the transaction details open.

Notice the options at bottom right.

Part Two – to create an order from a quote, perform additional steps

1. Access the **Transaction Tracking** page from the left navigation pane.
2. In the top area, check the box **Quote** so you can filter for quotes.
3. When you find the row containing the quote you want, look far right. Click on the **Order Details icon** from within **Transaction Details** column.
4. A new window will open with the details of your transaction. Select the button **Convert to Order** to review before you submit the order.

You will find yourself back on the Price/Availability page with product grid filled out at bottom. You will be prompted to enter your PO name.

Click **Submit Order**.

The transaction overview page confirms your order creation and shows a new status.

*Part Three – After your order is placed:*

After your order has been placed, FDOS sends an automatic order acknowledgement to the default email address that exists in the system. This may be different than the email address that you used to create your Distributor Portal account. To determine which e-mail address receives order acknowledgements as default, contact Order Management.

To check your order history, log into the FDOS. Click on **Transactions Tracking** in the left navigation menu. You will see a **Track Transactions page** where you can search for transactions, open them for details, and check shipping status and more. For more details on this, read the section below E. Transaction Tracking.

E. Transaction Tracking page – search & download

The Transaction Tracking page has various types of search parameters to help you narrow down what you are looking for.

1. To search for all types of transactions first select **Transaction Tracking** from the left navigation pane:
2. Check the box by the type of transaction you seek; Quote, Sales Order, Return, Credit Memo. Select multiple transaction types if you wish.
3. In area 3, you have more independent search criteria if you prefer searching differently.
4. In area 4, we show what would appear if we had searched for both quotes and sales orders.
5. The **Transaction Details** column contains clickable icons you can open for more details.
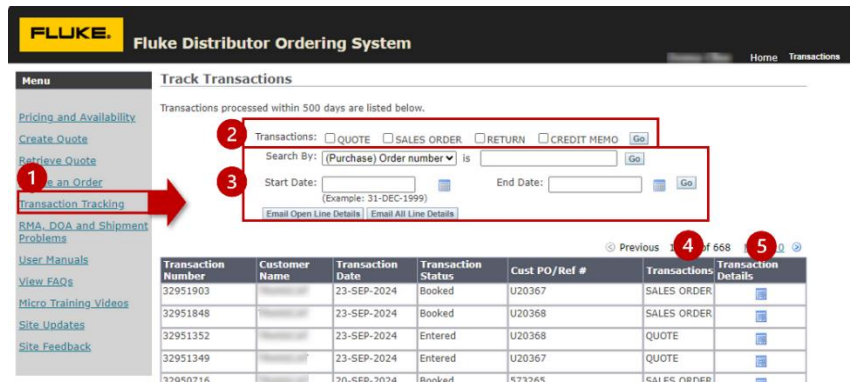
Here we clicked on an icon to open the **Transaction Details** for a Sales Order transaction.

- Each line in the **Transaction Details** lists the status of each item in the order.
- If the line item has not yet shipped, the transaction details will show the **Estimated Ship Date**.
- The **Status** column informs about logistics – items either are **Awaiting Shipping** or are listed as **Closed** if they have already shipped.

o   If an item is **Closed** (already shipped), then you will see the **Waybill Number** column, which shows the tracking number for the shipment.
NOTE: **Waybill** column is not shone above (it is further over to the right).

Other functions available from Transaction Tracking

Buttons on the **Transaction Details** page provide additional functionality.

1. **Cancel Lines:** Clicking this button opens a pop-up request. You can fill out a request to cancel a particular line in the order or to cancel all lines in the order. The request is then sent to Order Management who will respond to you directly to inform whether your request was possible. NOTE: To cancel an entire order, pick "Select All" or contact Order Management directly.

2. **Email Acknowledgement**: This re-sends the official acknowledgement of the Fluke Order.
3. **Email Pro Forma Invoice**: This allows you to re-send the official pro forma invoice from Fluke.
4. **Email Shipping Invoice**: This allows you to send a copy of the delivery information if any of the lines on the order have been shipped. A new window will open showing all delivery numbers from this order and you can select one or multiple deliveries.

F. RMA, DOA, and shipment problems

There are a variety of reasons distributors may wish to return product. To submit a return request, (also known as an RMA) complete three steps:

1. First, read the terms and definitions to understand which scenario applies to you. Here they are:

Reason for RMA (Return)	Definition
Stock Rotation	This option must be selected when distributor is looking to stock rotate inventory on-hand following the current stock rotation guidelines.
Defective on Arrival (DOA)	This option must be selected when you sell a defective product to an end customer according to the DOA guidelines or when a product that you picked up from your warehouse presents a defect.
Over shipment	This option must be selected when Fluke ships you product in excess of what is stated in the shipping documents.
Under shipment	This option must be selected when Fluke ships you less product than what is stated in the shipping documents.
Incorrect product received	This option must be selected when Fluke ships you wrong products that distributor didn't order. On this particular case we ask you to directly contact Fluke Distribution Orders because the proper resolution would be case dependent.

2. Second, within the left navigation pane, click on the page **RMA, DOA and Shipment Problems** page.
    *   In the middle of that page, find the area called **Shipping and Return Detail.**
    *   Click the **Reasons Code** drop-down menu and select your reason.
    *   A notification message will appear guiding you as to what information needs to be filled out but we also have included it here below.
3. Following the guidance of the pop-up notification message, you will fill out RMA info as listed here:

Reason for RMA	Specific information needed as per the notification message
Stock Rotation	Complete this information: • Offsetting PO number - put this in **Return Details** field . • The complete list of products for which you are requesting the RMA.

Defective on Arrival (DOA)	Complete this information:
	• Describe type of defect in the **Return Details** field.
	• Check **Yes** or **No** in the **Sold to Customer** field:
	    ○ If **Yes**, upload Bill of Sale by clicking Upload Supporting Document.
	    ○ If **No**, continue to the next step.
	• Complete the list of products you are requesting for the DOA.

Over shipment	Complete this information:
	• Add the Original PO# or Invoice/Delivery# into the **Return Details** field
	• Fill out the **Resolution Option** field (pick one option):
	    ○ **RMA No Credit:** distributor must return the product to Fluke.
	    ○ **Bill Only:** distributor will keep the products and Fluke will invoice for the additional material received.

|	• Complete the list of products for which you are requesting the Over shipment.
Under shipment	Complete this information: • The original PO/Invoice/Delivery# into **Return Details** field. • The complete list of products for which you are requesting the RMA.
Incorrect product received	As above, we request you directly contact Fluke Distribution Orders (Order Management) due to variability for this case type. You will still need to include your original document (PO, Invoice, or Delivery Number).

G. CSV upload – use an Excel file to expedite your process

As an alternative to uploading items one-by-on to your cart (manually), you can upload multiple items using a simple Excel .csv template. In this process, you only need two columns of information – Fluke item number and quantity. When you upload the .csv file, all other fields populate with information.

1. From the **Pricing and Availability** page, Click **Download .CSV Template** and save the file to your computer by the name you choose.
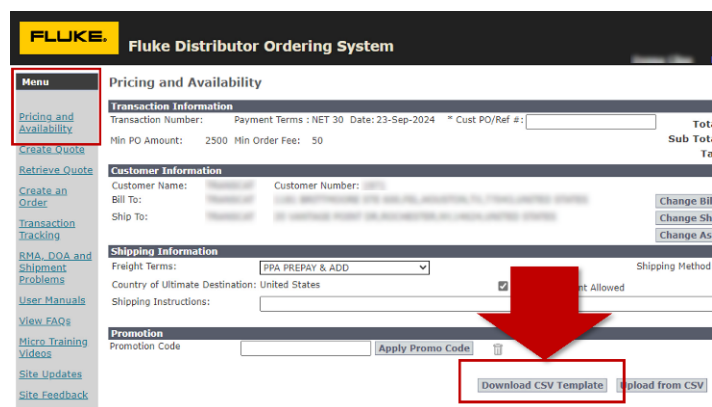
2. Open the Excel file and fill out Column A with the item number (**INV_NUM**)
3. Also fill out column B with your desired quantity (**QTY**). You can always adjust the quantity on the Product Grid after upload.
4. Save your Excel document as a .csv file.
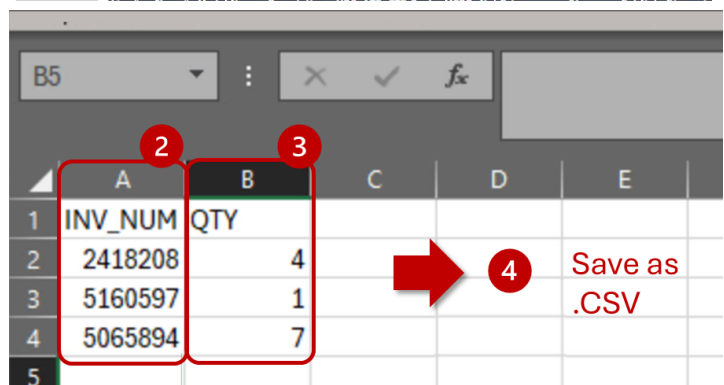
Back on the **Pricing and Availability** page, now click the **Upload from CSV** button. Navigate to your file location and select it.

While the file is loading you will see a window overlaying the screen:

Request in progress. Please do not click on the back button or navigate away from the page.
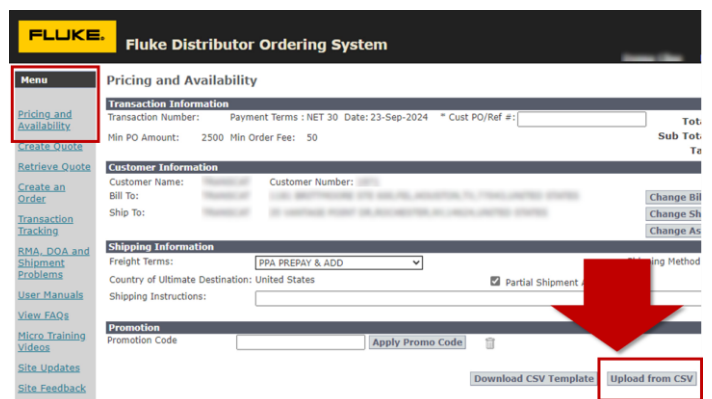
5. Once the file is loaded you will see the Product Grid at the bottom, as pictured here:
   - Change your quantities if desired.
   - Save this as a quote or submit it as an order.

Item failure during .csv upload?

What to do if you see an error message like this?

9 items successfully uploaded. 1 items failed to upload. An email has been sent with the details.

In the event of an error in upload, check your email to see which line items failed in your file.
For example, this error message says " **– line 1**":

This means that an item from line 1 in the .csv file cannot be loaded into the cart.
- There could be multiple reasons why this could be occurring, for example no discount of the item or item not available on FDOS.
- Try adding the missing item manually. If that does not work, contact your Order Management team for further assistance.

After placing your order / obtaining order history
- Reference Part Three in section **D.** for information on your order acknowledgement and order history.