

# Purchase Order and Invoice Process (P2P)

## Quick Guide for Connect Suppliers

September 2023



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# 1 Introduction

Your customer, Robert Bosch GmbH (referred to hereinafter as "Bosch"), is undergoing a global transformation in the procurement of indirect materials and services through the Supplier@NET initiative. This transformation includes the implementation of an electronic procurement process facilitated by the SupplyOn online platform.

Here's what this means for you as a supplier to Bosch: moving forward, you will seamlessly receive purchase orders via SupplyOn and have the ability to process them directly online, covering everything from order confirmation to invoicing.

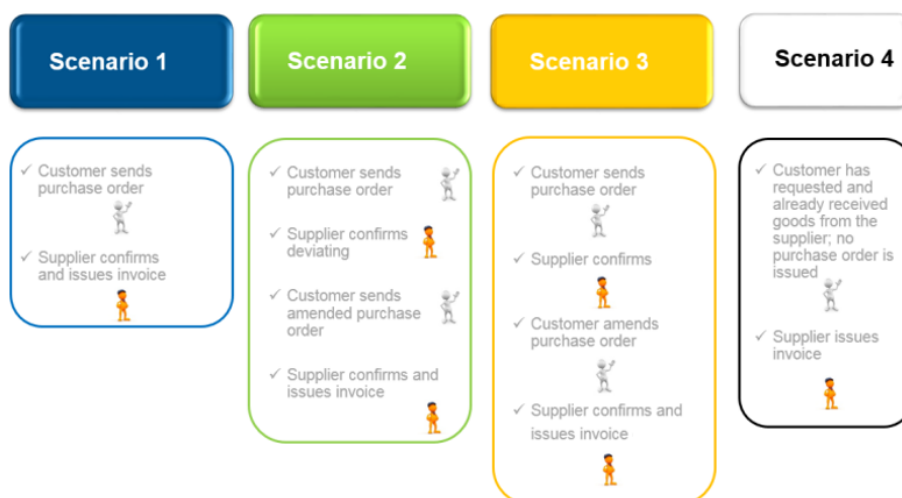
The electronic transmission of purchase orders, order confirmations, and invoices offers a fast, convenient, cost-effective, and environmentally friendly alternative to the traditional process. This guide is designed for suppliers like you who utilize SupplyOn, providing an overview of how to effectively navigate electronic purchase orders and utilize them to generate invoices.

For in-depth information, please consult the P2P instructions for Connect Suppliers.

## 1.1 Possible Purchase Order processing scenarios

- **Scenario 1:** Bosch sends a purchase order that you, as a supplier, confirm as ordered. You generate an invoice following delivery.
- **Scenario 2:** Bosch sends a purchase order that you, as a supplier, confirm with changes. You generate an invoice following delivery.
- **Scenario 3:** Bosch sends a purchase order that you, as a supplier, confirm as ordered. Bosch changes the purchase order and you, as the supplier, confirm the change. You generate an invoice following delivery.
- **Scenario 4:** The customer allows you to generate an invoice without a purchase order reference. You generate an invoice following delivery.

### Possible order confirmation scenarios



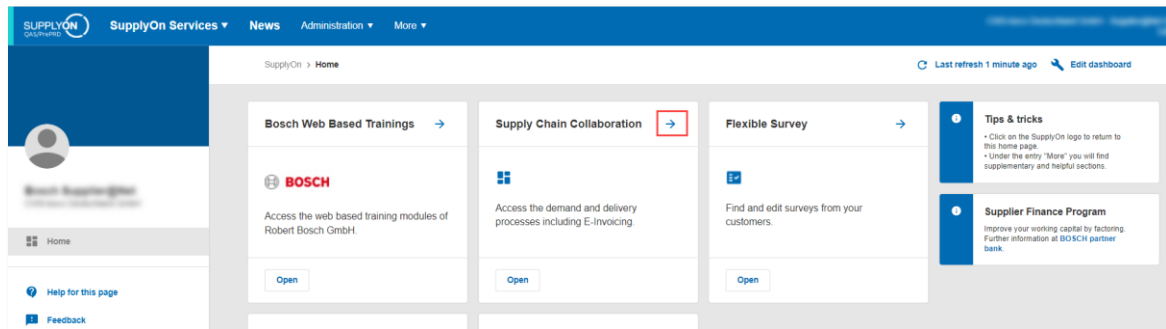
\*How this works in SupplyOn is described in the corresponding chapter

## 2 How to process Purchase Orders

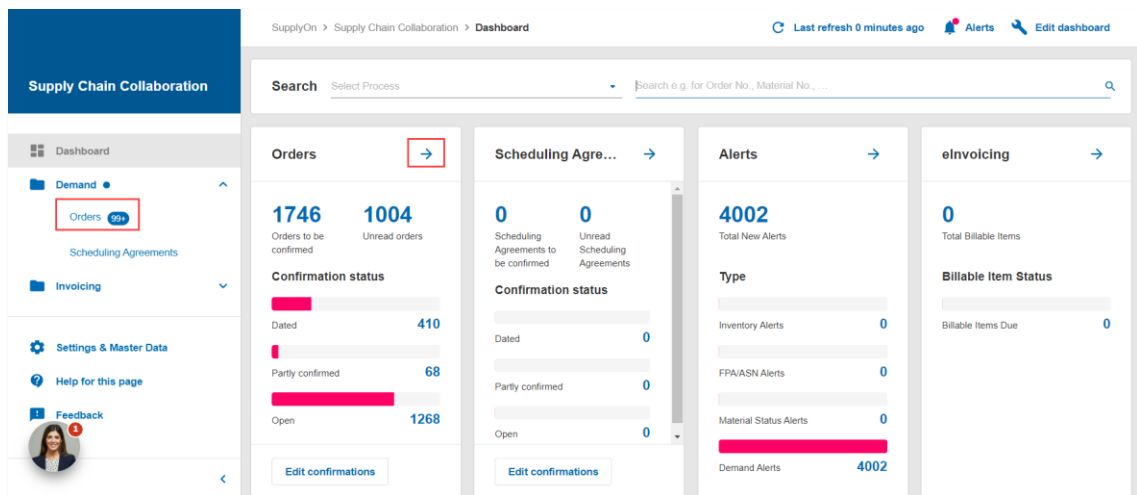
This section provides instructions on reviewing and confirming a purchase order from Bosch.

### 2.1 Access the Orders Overview

Access the Supply Chain Collaboration by clicking on the arrow icon in the dashboard.



Access the Orders Overview by clicking on the arrow icon within the Orders tile or by selecting the "Orders" option in the Navigation Bar on the left-hand side.



## 2.2 Confirm Purchase Order

### 2.2.1 Overview Configuration

You will be directed to the Orders Overview, where each column provides relevant information regarding each individual order. This overview can be customized:

- 1 Display or hide columns by setting the eye icon to visible or invisible.
- 2 Rearrange columns through simple drag and drop within the overview, or by dragging and dropping the drag icon within the view menu.

- 3 Click on the pin icon to freeze a column and keep it visible when scrolling.
- 4 You can save your customized overview for your next login by saving the changes to the Default Profile or by creating your own profile.

The screenshot shows the 'Orders' overview page with the 'Order line items' tab selected. The table displays columns: Order, Order status, Read, Customer, Customer site, Order date, and Order type. A red dashed arrow points from the 'More' button to the 'View' button. A red box highlights the 'View' button. A red box highlights the 'Default Profile' section in the 'Your profiles for the table view' sidebar. A red box highlights the 'Read' column in the table. A red box highlights the 'Confirmation' column in the table. A red box highlights the 'Read' column in the table.

## 2.2.2 Confirm single line item

In the Orders overview, click on the “Order line items” 1 tab . Check the requested delivery date, quantity, and price per unit 2 . If these columns are not available in the current view, customize it as shown in [Section 2.2.1](#).

Select the item you want to confirm 3 and click on “Edit confirmations” 4 .

The screenshot shows the 'Order line items' tab with the 'Edit confirmations' button highlighted. The table displays columns: Order number, Line item, Material number, Customer, Requested del. date, Requested qty., Requested price per unit, and Confirmed date. A red box highlights the 'Edit confirmations' button. A red box highlights the 'Requested del. date', 'Requested qty.', and 'Requested price per unit' columns. A red box highlights the 'Confirmed date' column. A red box highlights the 'X87-0087483...' item.

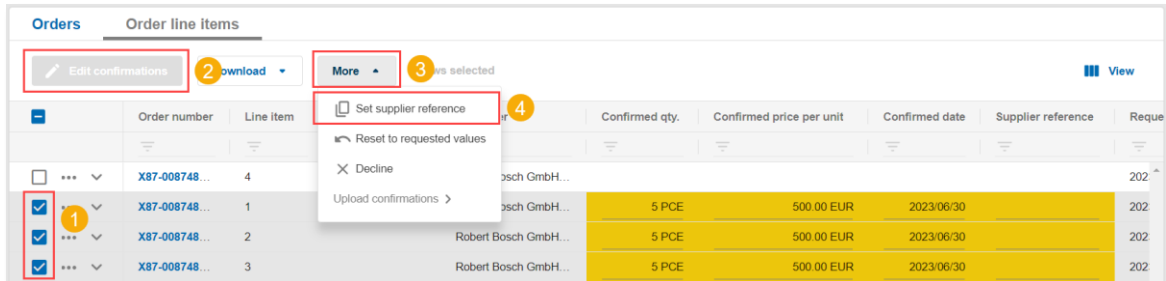
If requested quantity, price or delivery date are incorrect, adjust them by overwriting the yellow fields 5 , add supplier reference 6 and then click on “Send confirmations” 7 .

The screenshot shows the 'Order line items' tab with the 'Confirmed qty.', 'Confirmed price per unit', and 'Confirmed date' columns highlighted. The 'Supplier reference' column is also highlighted. The 'Send confirmations' button is highlighted. The 'X87-0087483...' item is highlighted.

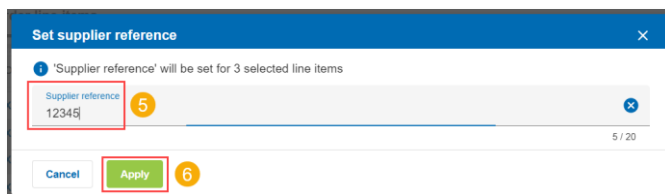
## 2.2.3 Confirm multiple line items

Select the order items you want to confirm **1** and click on “Edit Confirmations” **2**.

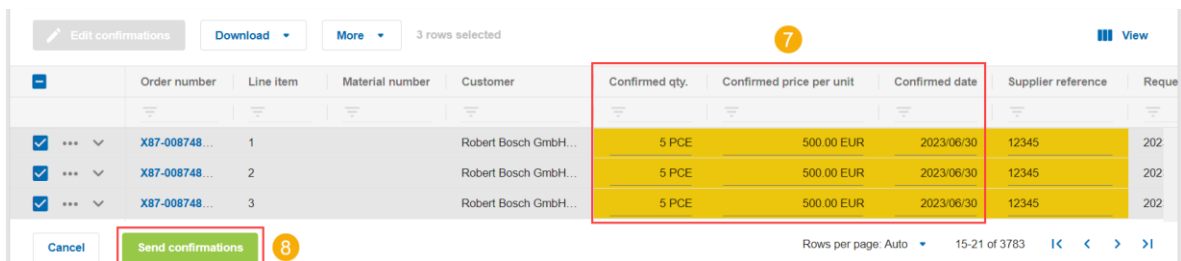
To add a supplier reference to all items, click on “More” **3** and then select “Set supplier reference” **4**.



A pop-up window will appear. Type in the supplier reference **5** and then click on “Apply” **6** to add the reference to all the items selected.



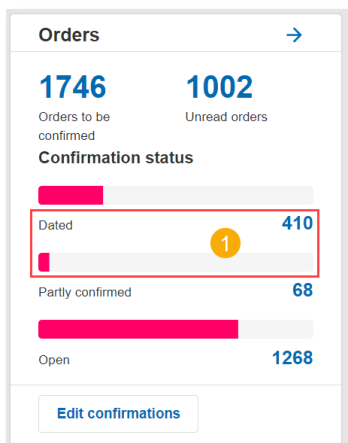
Check the delivery date, delivery date and requested quantity, adjust them if **7** necessary and finally click on “Send confirmations” **8**.



## 2.3 Confirm updated Purchase Orders

If you have confirmed an order with deviations (Modifying delivery date, quantity, or price per unit), the customer will send an update to the order. This update ensures that both parties agree and that the finally agreed parameters are available for invoicing at the end of the process.

To confirm updated orders, go to the SCC dashboard and click on “Dated” **1**.



You will be directed to a prefilered Orders Overview with updated orders. Dated orders may either appear as “Updated” or “Cancelled” in the “Order status” column (2).

Orders		Order line items					
<a href="#">Edit confirmations</a>		<a href="#">Download</a> (2)	<a href="#">More</a> ▾		<a href="#">Search</a>		
<input type="checkbox"/>	Order	Order status	Read	Customer	Customer site	Last update by customer	Order date
<input type="checkbox"/>	... X87-0083500832	Updated	Read	Robert Bosch GmbH, ...	PS-0110-FeP	2023/06/23, 13:43	2023/06/22
<input type="checkbox"/>	... X87-0087483458	Updated	Unread	Robert Bosch GmbH, ...	PS-0110-FeP	2023/06/22, 14:43	2023/06/22

Follow the steps described in [Section 2.2.2](#) and [Section 2.2.3](#) to confirm the order.

## 2.4 Reviewing order updates

Order updates can also be identified by checking the “History available” column and verifying if the status is indicated as “Yes” (1).

Orders		Order line items								
<a href="#">Edit confirmations</a>		<a href="#">Download</a>	<a href="#">More</a> ▾		<a href="#">1 applied search criterion</a> <a href="#">Search</a>					
<input type="checkbox"/>	Order	Order status	Confirmation	Read	History available	Customer	Order date	Order type	Material	Cus
<input type="checkbox"/>	... R87-0087483127	Updated	Required	Unread	Yes	Bosch Diesel spol.	2023/07/31	Purchase order		
<input type="checkbox"/>	... R87-0087483121	Updated	Required	Unread	Yes	Robert Bosch GmbH	2023/07/25	Purchase order		F
<input type="checkbox"/>	... X87-0087483486	Initial	Required	Read	No	Robert Bosch GmbH	2023/07/31	Purchase order		F

To go into the details of what has been changed, click on the three dots next to the order of interest and then click on “View history” (2).

Orders		Order line items								
<a href="#">Edit confirmations</a>		<a href="#">Download</a>	<a href="#">More</a> ▾		<a href="#">1 applied search criterion</a> <a href="#">Search</a>					
<input type="checkbox"/>	Order	Order status	Confirmation	Read	History available	Customer	Order date	Order type	Material	C
<input type="checkbox"/>	... R87-0087483127	Updated	Required	Unread	Yes	Bosch Diesel spol.	2023/07/31	Purchase order		
<input type="checkbox"/>	... R87-0087483121	Updated	Required	Unread	Yes	Robert Bosch GmbH	2023/07/25	Purchase order		F
<input type="checkbox"/>	...		Required	Read	No	Robert Bosch GmbH	2023/07/31	Purchase order		F
<input type="checkbox"/>	...		Required	Unread	Yes	Robert Bosch GmbH	2023/07/27	Purchase order		F
<input type="checkbox"/>	...		Required	Unread	No	Robert Bosch GmbH	2023/07/27	Purchase order		F

In the Order History overview, you will see information about the number of versions available for the selected order **3** .

Click on any of the listed versions of the order to see detailed information on the modifications made on each update **4** .

My SupplyOn > Supply Chain Collaboration > Orders > **Order history** Contact | Help for this page | Print

**Order History**

Order						
Customer	BOSCH GROUP 0110 Robert Bosch GmbH					
Order Number	R87-0087483121					
Order Date	25.07.23					
Pos.	Change Date	Material	Description	Requested Del. Date	Order Qty.	Comment
1			test	03.08.23	1	

**3** Number of versions: 2

All Versions:  
 25.07.23 14:38:00 (Original)  
 31.07.23 15:38:00 **4**

[Back](#) [Print](#)

### 3 Master data setup for invoice creation

Before creating an invoice, it is recommended to set the VAT number in the Company Master Data to prevent manual reentry every time an invoice is created. To set the VAT number click on "SupplyOn Services" and in the drop-down menu select "Business Directory".

SUPPLYON QAS/PrePRD

**SupplyOn Services** ▾ News Adm

- Sourcing
- Business Directory**
- Supply Chain Collaboration
- Flexible Survey

Select the company profile that need to be updated.

**Company profiles**

☐ Corporate-Test-Seller-Group Bosch

D-U-N-S no.:

City: Muenchen Country: DE

<input type="checkbox"/> CWS-boco Deutschland GmbH	<a href="#">Open profile</a>
<input type="checkbox"/> Bosch Sales France (France) AG	<a href="#">Open profile</a>
<input type="checkbox"/> Bosch Sales Switzerland AG	<a href="#">Open profile</a>
<input type="checkbox"/> Bosch Sales Austria (Austria)	<a href="#">Open profile</a>
<input type="checkbox"/> Bosch Sales Italy	<a href="#">Open profile</a>
<input type="checkbox"/> Bosch Sales Spain	<a href="#">Open profile</a>

Scroll down to the section "Change Company Data", enter the VAT number **1** .  
 Click on Save **2** .



### Change Company Data

*This is change company data section. Please note that the data will be displayed correctly after login.*

Company name:	<input type="text" value="CWS-boco Deutschland GmbH"/>		
Commercial registration number:	<input type="text"/>		
D-U-N-S Number:	<input type="text" value="332253132"/>		
VAT number:	<input type="text" value="12345"/>	1	
Street, Nr:	<input type="text" value="Dreieich Plaza 1A"/>	Street 2:	<input type="text"/>
ZIP Code:	<input type="text" value="63303"/>	City:	<input type="text" value="Dreieich"/>
State:	<input type="text"/>	Country:	<input type="text" value="Germany"/>
PO-Box:	<input type="text"/>	PO-Box Zip:	<input type="text"/>
PO-Box City:	<input type="text"/>	PO-Box Country:	<input type="text"/>

#### Identifiers and Keys

SupplyOn SPIN-ID:

2

## 4 Role for Invoicing

Please take into consideration that the **Company Administration** role needs to be set up in your account to modify the Company Master Data, otherwise you will not be able to make any changes.

Company Administration (assigned)			<a href="#">Collapse</a> <a href="#">IT</a>
Role	Status	Description	
<input checked="" type="checkbox"/> CompanyAdmin	assigned	Manage company data. For suppliers, the authorizations of the roles "BusinessDirectorySupplierStandard" and "SLMSupplierAll" are included.	<a href="#">Show companies</a>
<input checked="" type="checkbox"/> ControlPointAdmin	assigned	Creation and administration of sites in the Supply Chain Directory. Article data administration.	<a href="#">Show companies</a>
<input checked="" type="checkbox"/> CorporateGroupMasterDataAdmin	assigned	Master data administration for companies within a group.	

In case you do not have this role, please contact your company administrator to request the role.

## 5 Invoicing

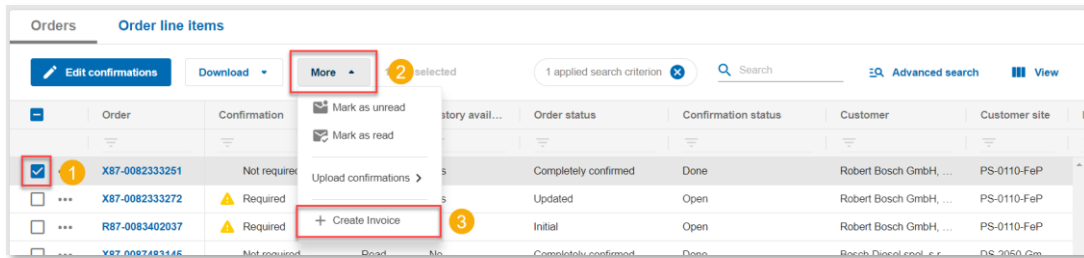
Invoices can be created in two ways:

- Generate invoice from a confirmed Purchase Order
- Generate invoice without an existing Purchase Order

### 5.1 Create invoice from a confirmed purchase order

#### 5.1.1 Create an invoice from the Orders Overview

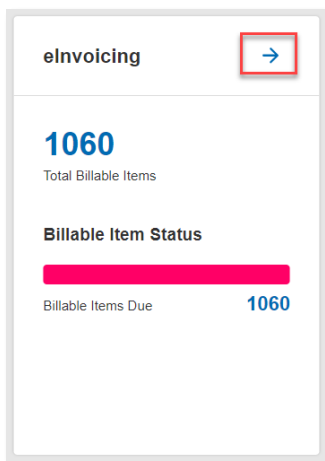
If a purchase order has just been confirmed, you can immediately start the invoicing process in the Orders overview. Select an order 1, click on "More" 2, and then click on "Create Invoice" 3.



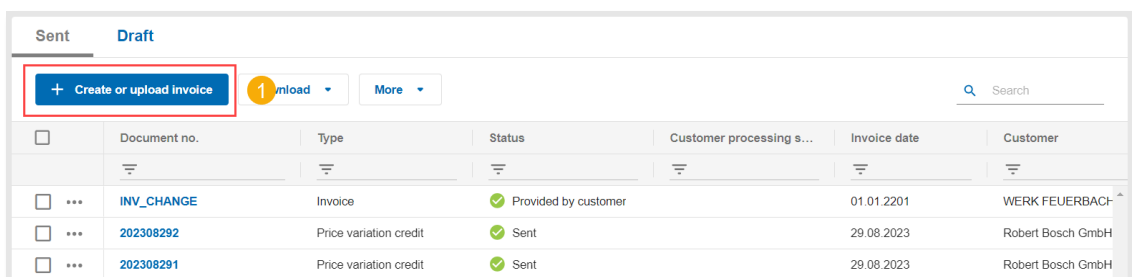
The invoice is generally generated after the delivery. Steps on how to fill in an invoice are described in [Section 5.1.2](#).

### 5.1.2 Create an invoice directly in the elnvoicing Overview

You can also create an invoice by accessing the elnvoicing Overview directly. To access the elnvoicing Overview, click on the arrow in the respective tile within the Dashboard.



Click on “Create or upload invoice” 1.

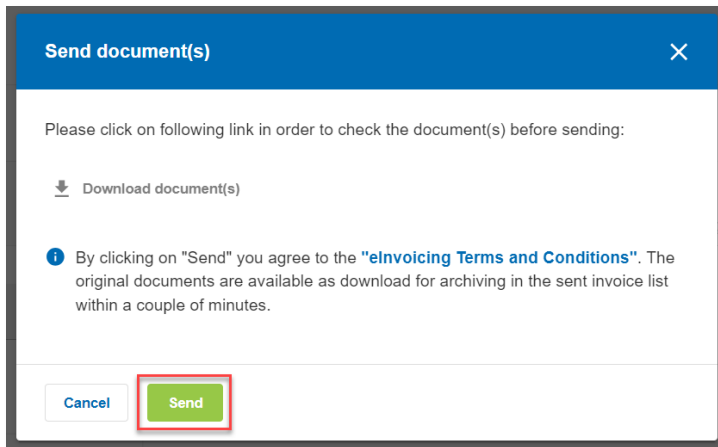


Select “From order” 2 to create an invoice from an existing (already confirmed) purchase order.

Type in the purchase order number **3** , on document type select “Invoice” **4** and click on “Create” **5** .

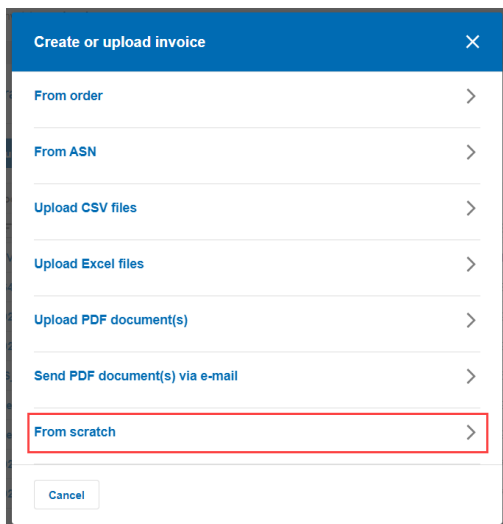
Complete all required fields with the necessary information (scroll down to access additional sections for completion). Click on “Save as Draft” **6** to save your progress and resume later for invoice creation. Select “Check” **7** to validate that all fields have been properly filled. Click on “Save and Send” **8** to generate the invoice.

Prior to sending the invoice, you have the option to download a preview of the invoice as a PDF to ensure all details are accurate. If all information is correct, proceed to click on "Send." Your customer will promptly receive the electronic invoice.



## 5.2 Generate invoice from scratch

You also have the option to generate an invoice from scratch, without being linked to a pre-existing purchase order. To do this, navigate to the eInvoicing overview, and after selecting "Create or Upload Invoice," choose the option "From Scratch." Proceed by following the steps outlined in [Section 5.1.2](#).



## 5.3 Upload invoice as CSV

You can upload multiple invoices for a single customer (Bosch plant) simultaneously if they are in CSV format. To do this, navigate to the eInvoicing overview, and after selecting "Create or Upload Invoice," choose the option "Upload CSV files".

Create or upload invoice

From order

From ASN

Upload CSV files

Upload Excel files

Upload PDF document(s)

Send PDF document(s) via e-mail

From scratch

Cancel

Choose the CSV file and then click on “Send”.

Create or upload invoice

Upload CSV documents to SupplyOn

Drag and drop or browse

Accepted file types: \*.csv (View additional information). Attachments can be added after creation.

Cancel

Save as draft

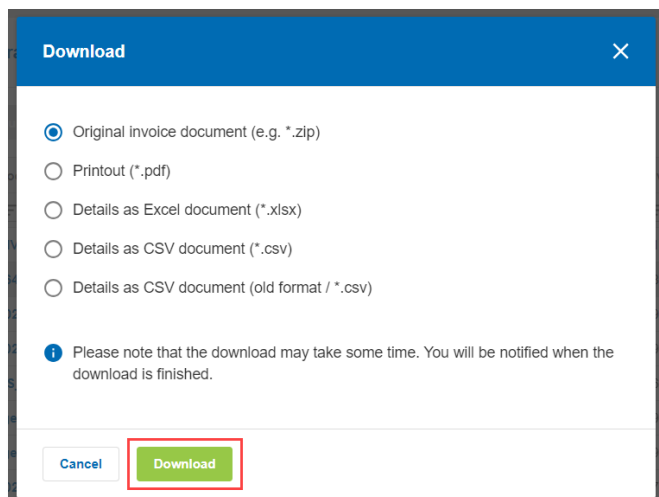
Send

## 5.4 Download invoice

Once an invoice has been sent, the status will automatically change to “Sent” <sup>1</sup>. To download an invoice, select an invoice <sup>2</sup>, click on “Download” <sup>3</sup> and in the drop-down menu select the option “Documents” <sup>4</sup>.

Sent		Draft				
				<div> <div>+ Create or upload invoice</div> <div>Download</div> <div>More</div> </div> <div>1 row selected</div> <div>Search</div>		
<input type="checkbox"/>	Document no.		Status	Invoice date	Customer	Customer
<input type="checkbox"/>	INV_CHANGE		Provided by customer	01.01.2201	WERK FEUERBACH - PS	
<input checked="" type="checkbox"/>	864397509		Sent	28.09.2023	Robert Bosch GmbH	
<input type="checkbox"/>	202308292		Sent	29.08.2023	Robert Bosch GmbH	
<input type="checkbox"/>	202308291		Sent	29.08.2023	Robert Bosch GmbH	

Select the desired type of document and then click on “Download”.



## 5.5 Overview configuration

Customize your view by clicking on the drawer icon within any of the columns <sup>1</sup>. Check the boxes to either display or hide the columns you wish to see in your overview <sup>2</sup>.

