

Handout for SupplyOn Services

Business Directory, Performance Monitor, Sourcing



Table of Contents

1	About this manual	3
1.1	Intended Audience	3
1.2	Typographical and Graphical Conventions	3
1.3	Abbreviation	3
2	What can I do in the Business Directory?	4
2.1	Edit supplier profile.....	4
2.2	Store and update certificates	6
2.3	Answering surveys	7
3	How to create a bid? (Sourcing)	9
3.1	Creating a bid online	9
3.2	Downloading, editing, uploading and submitting bids	11
3.3	Adding attachments	12
3.4	Editing a Cost Breakdown Sheet (CBS)	13
3.5	Start a discussion.....	13
4	How do I read my rating data? (Performance Manager)	14
4.1	Overview	14
4.2	Operative Bewertung	16

1 About this manual

This handout contains the SupplyOn modules which are trained online. The document serves as a reminder and does not claim to be complete.

1.1 Intended Audience

Participants of Online training for Bosch Rexroth supplier.

1.2 Typographical and Graphical Conventions

The following typographical conventions are used throughout this manual:

Example	Meaning
Screen Text	Text visible in the user interface becomes bold .
<i>Reference</i>	References are displayed in <i>italics</i> .

1.3 Abbreviation

Abbreviation	Sense
CBS	Cost Breakdown Sheet (Sourcing)
CSV	Character-separated-values
ERP	Enterprise-Resource-Planning
IE	Internet Explorer
PDF	Portable Document Format
PPM	Parts per million (defect parts)

2 What can I do in the Business Directory?

In the Business Directory, you can maintain your supplier profile and store and update your certificates. If the customer invites you to a survey, edit it in the Business Directory.

The user with the role **'BusinessDirectorySupplierStandard'** automatically receives an e-mail notification as soon as a new survey has been sent by the customer and is able to edit the supplier profile.

2.1 Edit supplier profile

1. Open a browser (IE or Chrome)
2. enter supplyon.com
3. register with SupplyOn

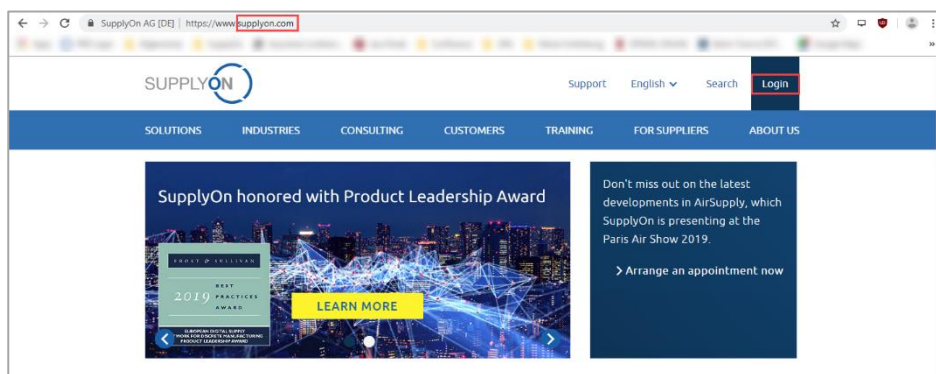


Figure: Chrome / SupplyOn Home Page

4. Enter your **User ID** and **Password**

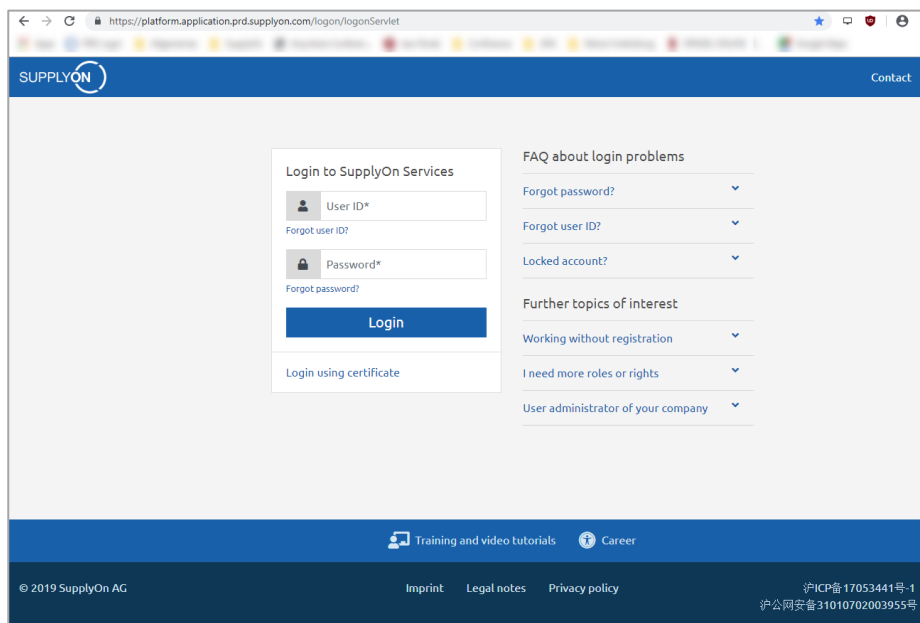


Figure: Chrome / Login Screen

5. Open the SupplyOn Service **Business Directory**

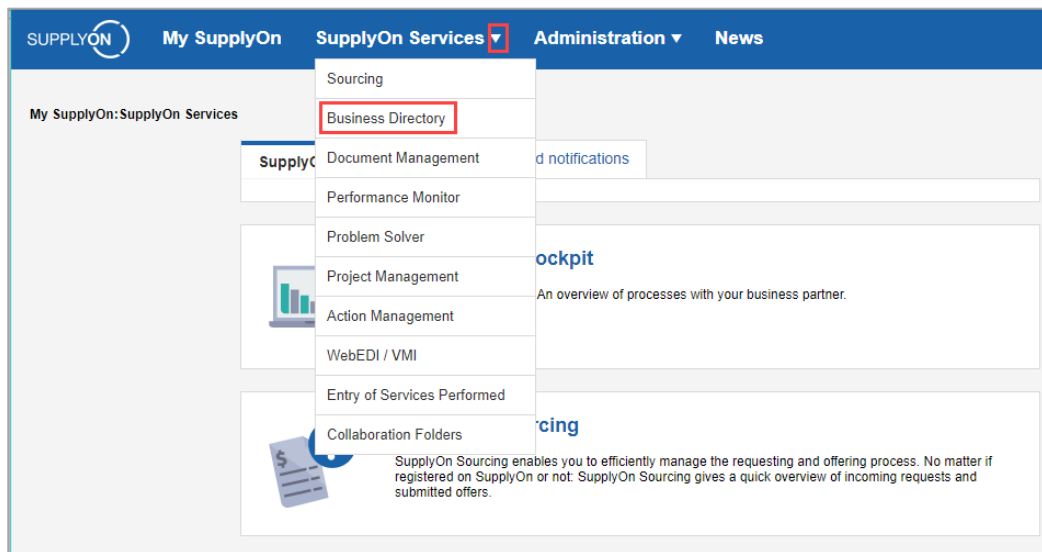


Figure: My SupplyOn:SupplyOn Services / Dropdown menu

Note: if you work with the eInvoice service, we advise you to maintain the following master data.

To avoid entering your tax information repeatedly, enter it once in the Business Directory.

6. Open the tabs 'My profile' and 'Address',

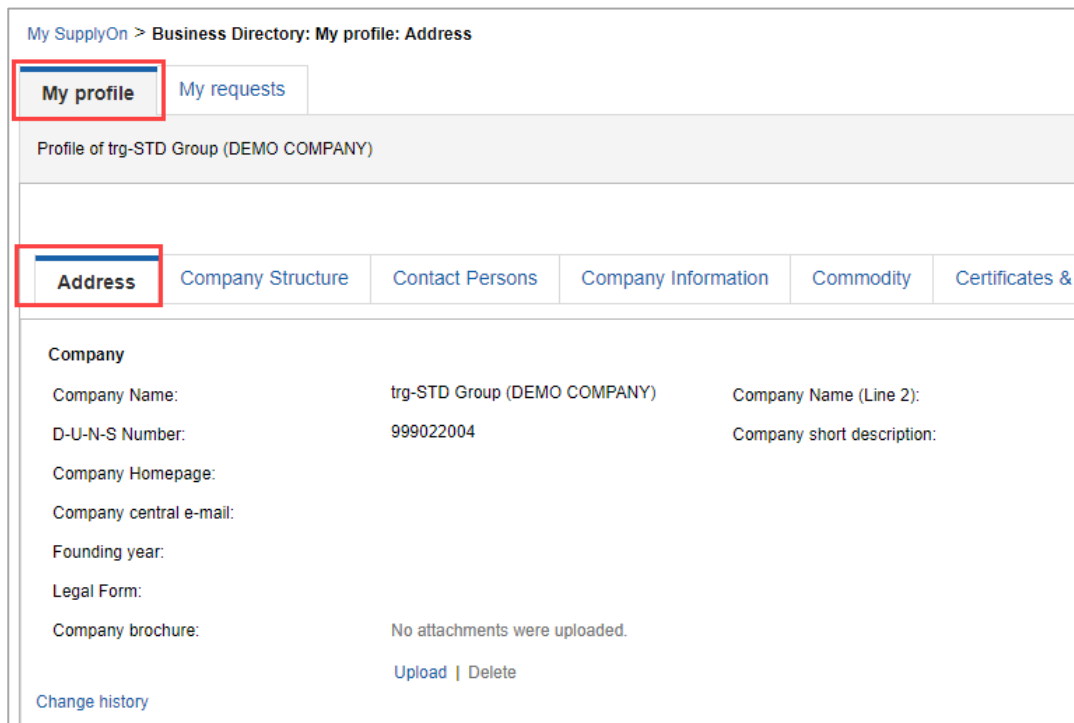


Figure: Business Directory: Myprofile: Address

7. scroll down to **Change Company Data**,
8. Enter your **VAT number** and if available the **Commercial registration number**
9. and **save** your entries.

Change Company Data

You have saved the company data. Please note that the data will be displayed correctly after login.

Company name:

Street Nr: Street 2:

ZIP Code: City:

State: Country:

VAT number: **Commercial registration number:**

PO-Box: PO-Box Zip:

PO-Box City: PO-Box Country:

Identifiers and Keys

Fiscal Registration ID:

SupplyOn SPIN-ID:

Financial Accounting

Bank Name: Bank Code:

Account Number: IBAN (International Bank Account Nu...:

SWIFT-Code (BIC):

Figure: Business Directory: Myprofile: Address / Change Company Data

2.2 Store and update certificates

10. Scroll to the top and click the tab **Certificates & Audit**
11. Open a certificate category, in this example **ISO/IEC 17025**, fill the relevant data and upload the certificate.

My SupplyOn > Business Directory: My profile: Certificates & Audit

My profile | My requests

Profile of trg-STD Group (DEMO COMPANY)

Address | Company Structure | Contact Persons | Company Information | Commodity | **Certificates & Audit** | Manufacturing Competences | Products (eCI@ss) | Conflict Minerals EN | Smelter L...

Show level [1] [2] [3] [4] [5] Expand all | Collapse all

Certificates:

- Quality Management System
 - ISO 9001 ISO 9001: Validity (to):
 - ISO/IEC 17025** ISO/IEC 17025: Validity (to):
 - ISO/IEC 17025: Document: No attachments were uploaded. ISO/IEC 17025: Registration number:
 - ISO/IEC 17025: Agency - Registratio...: ISO/IEC 17025: Agency (name, locat...:
 - ISO/IEC 17025: Remark:
- ISO/TS 16949 ISO/TS 16949: Validity (to):
- IATF 16949 IATF 16949: Validity (to):
- ISO/TS 16949 - Semiconductor Supplement Semiconductor: Validity (to):
- AEO Authorized Economic Operator AEO: Validity (to):
- VDA 6.1 VDA 6.1: Validity (to):

Figure: Business Directory: Myprofile: Certificates & Audit / ISO/IEC 17025

Update the Validity (to) field on a regular basis.

2.3 Answering surveys

The customer can send you surveys on various topics. You will receive an e-mail notification when a new survey is available.

12. Open the email
13. and click on the link.
14. Enter your password.

The survey is open.

15. Fill in the survey accordingly and send your answer.

My SupplyOn > Business Directory: My requests > CASD_Zertifikate Sun Feb 15 07:00:05 CET 2015

Request CASD_Zertifikate Sun Feb 15 07:00:05 CET 2015

Save as draft Send response Cancel More

Request details

Request

Request: CASD_Zertifikate Sun Feb 15 07:00:05 CET 2015 Start date: Dec 23, 2018 7:00:04 AM Forward survey to colleagues
ID: 142581074 End date:
Customer: trg-B. Fischer AG (DEMO COMPANY) Contact:
Description: Sehr geehrter Lieferant, bitte bestätigen bzw. aktualisieren sie rechtzeitig die folgenden Zertifikate in Ihrem SupplyOn Lieferanten-Profil. Vielen Dank im Voraus für Ihre Mitarbeit. Mit freundlichen Grüßen Sven Vollmer
Attachment: informationen-aenderungen-iso1-16949.pdf (137 KB);

Certificates & Audit

Certificates:

Quality Management System

ISO 9001

ISO 9001: Validity (to): 12/30/2018
ISO 9001: Document: ISO 9001.doc (117 KB)
Upload | Delete

ISO 9001: Registration number:
ISO 9001: Agency - Registration number:
ISO 9001: Agency - Name:
ISO 9001: Remark:

Figure: Business Directory: My requests / Request details

Alternatively you can open a survey directly from Business Directory.

16. Click the tab My requests

My SupplyOn > Business Directory: My profile: Address

My profile **My requests**

Profile of trg-STD Group (DEMO COMPANY)

Address Company Structure Contact Persons Company Information Commodity Certificates &

Company

Company Name: trg-STD Group (DEMO COMPANY) Company Name (Line 2):

D-U-N-S Number: 999022004 Company short description:

Company Homepage:

Company central e-mail:

Founding year:

Legal Form:

Company brochure: No attachments were uploaded.

Upload | Delete

[Change history](#)

Figure: Business Directory: My requests

All surveys received so far are displayed.

My SupplyOn > Business Directory: My requests [Help and support](#) | [Print](#) | [Message to support](#)

My profile **My requests**

Survey name	ID	Status	Customer	Contact	Changed by	Changed	Sort	Responses	Remaining time
CASD_Zertifikate Sun Feb 15 07:00:05 CET 2015	142581074	Active	trg-B. Fischer AG (DEMO ...			6/23/2019 7:00 AM CEST		Open	
Auto Survey Sun Nov 12 07:00:12 CET 2017	246893796	Active	trg-B. Fischer AG (DEMO ...			6/23/2019 7:00 AM CEST		Open	
CASD_Basis Qualifizierung Sun Sep 20 07:00:07 CEST 2015	170428408	Active	trg-B. Fischer AG (DEMO ...			5/5/2019 7:00 AM CEST		Open	
Fertigungskapazitäten	169331599	Closed	trg-B. Fischer AG (DEMO ...	Gabel, Elke		8/20/2015 8:33 AM CEST		Open	
ISO 9001 Query plus supplier mgmt	142192516	Closed	trg-B. Fischer AG (DEMO ...	Müller, Thomas		1/25/2015 9:05 PM CET		Open	
Test JOH	134469737	Closed	trg-B. Fischer AG (DEMO ...	Holzappel, Joachim		7/1/2014 9:06 AM CEST		Open	
Certificate ISO 9001	132271076	Closed	trg-B. Fischer AG (DEMO ...	Holzappel, Joachim		11/25/2013 6:00 PM CET		Open	
Fragebogen für RSP-Lieferanten	126593030	Closed	trg-B. Fischer AG (DEMO ...	Müller, Thomas		4/25/2012 2:34 PM CEST		Open	
Validity of ISO 9001 Certificat	101070591	Closed	trg-Brooks Automotive Tec...	Slaven, Dan		5/18/2010 3:38 PM CEST		Open	
Preferred Supplier iso 9001	100754390	Closed	trg-B. Fischer AG (DEMO ...	Gabel, Elke		3/31/2010 10:42 AM CEST		Open	

10 entries Rows per page 10 First Previous | Page 1 of 1 | Next Last

Figure: Business Directory: My requests / Overview of all surveys

3 How to create a bid? (Sourcing)

The customer invites you to a request for quote. The customer responsible receives an e-mail from the SupplyOn portal. The company administrator for SupplyOn can define the customer responsible and determine which person is responsible for which customer. If you have any questions, please contact your administrator.

3.1 Creating a bid online

To place a bid quickly:

1. Open the email
2. and click on the link.
3. Enter your User ID and password.
The bid is open.
4. Click **Enter bid line items**

My SupplyOn > Sourcing > Open requests > Sensors for Hydraulic mechanism(Active) Start guided tour | Help and support | Print | Message to support

Bid Discussions

[Submit bid](#) [Save as draft](#) [Decline request](#) [Back](#)

Bid [Enter bid line items](#)

Added colleagues Collapse

[Forward request to colleagues](#)

Request details Collapse

Request name:	Sensors for Hydraulic mechanism	Request ID:	1005890083 (Version 1)
Customer:	trg-boschbuyers01 (TRAINING COMPANY)	Contact:	Schmitz, Regina
End date, time:	Jul 5, 2019 11:59:00 PM	Start Date, Time:	Jun 25, 2019 10:58:02 AM

Remarks:

Link, Terms and Conditions: <http://purchasing.bosch.com/de/start/Algemeines/Download/index.htm>

Attachments: No attachments were uploaded. [Details](#)

Supplier response fields Collapse


You may answer the request directly in the form or also offline using Excel (see options on the right side).

Quotation remark:

Attachments: No attachments were uploaded. [Upload](#) | [Manage attachments](#)
CTRL key for multiple upload.

Item list Collapse

[Enter / change bid line items](#)

 1 line items are contained in the request. Please click on the link "Enter / change bid line items".

[Submit bid](#) [Save as draft](#) [Decline request](#) [Back](#) Discussions

Figure: Sourcing: Open requests

5. Fill the mandatory fields and confirm with **OK**

Item Name*	Part Number*	Is details	Currency*	Price unit	Quantity *	Price per price unit*					Supplier price unit (if differing from requested price unit)	Quotation Remark
						Year	Internal description	Price reduction (%)	Price per price unit	Description		
1 Sesonsor	890123		EUR		100,00€	1	2019			21		
						2	2020		3	20,37		
						3	2021		5	19,352		

Figure: Sourcing: Open requests / Bid Values

6. Click **Submit bid**.

Request details

Request name: Sensors for Hydraulic mechanism Request ID: f005890083 (Version 1)

Customer: trg-boschbuyers01 (TRAINING COMPANY) Contact: Schmitz, Regina

End date, time: Jul 5, 2019 11:59:00 PM Start Date, Time: Jun 25, 2019 10:56:02 AM

Remarks:

Link: Terms and Conditions: <http://purchasing.bosch.com/de/start/Algemeines/Download/index.htm>

Attachments: No attachments were uploaded.

Figure: Sourcing: Open requests / Submit Bids

Note: each customer has different mandatory fields and different request templates

3.2 Downloading, editing, uploading and submitting bids

To download a bid first in Excel:

7. Open the E-Mail
8. And click on the link
9. Enter your User ID and password

The bid is open

10. Click **Request (Excel)**

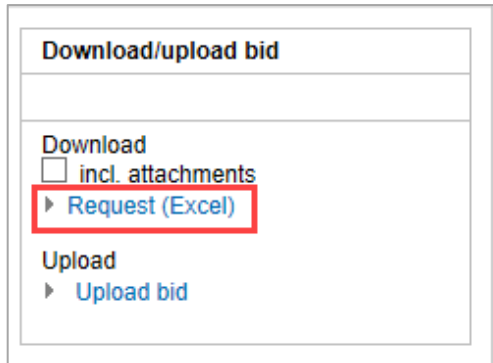


Figure: Download/upload bid

11. If you want to download a request with attachments at the same time, check the **Include attachments** box and click on **Request (Excel)**.

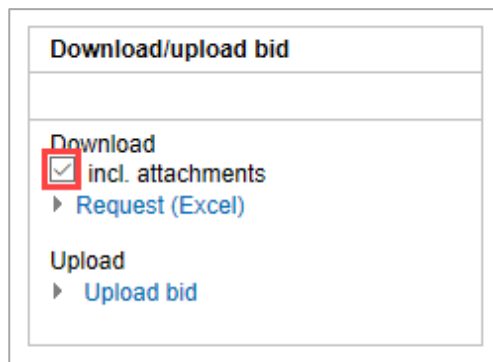


Figure: Download/upload bid with attachments

A ZIP file is downloaded with the request in Microsoft Excel format and the corresponding attachments. Fill the mandatory fields with your information.

12. Click **Upload bid**

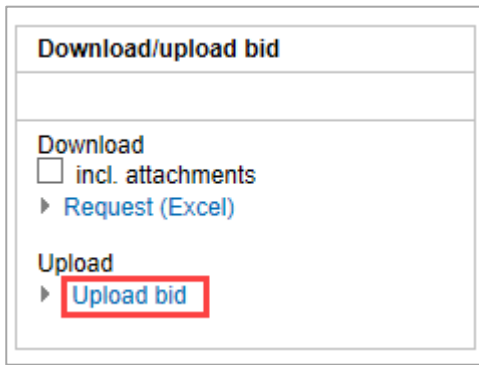


Figure: **Download/upload bid**

You have two alternatives:

- 13. **upload** a bid and check it in the system before you send it,
- 14. or set the checkbox at **Submit bid immediately** to send it directly.

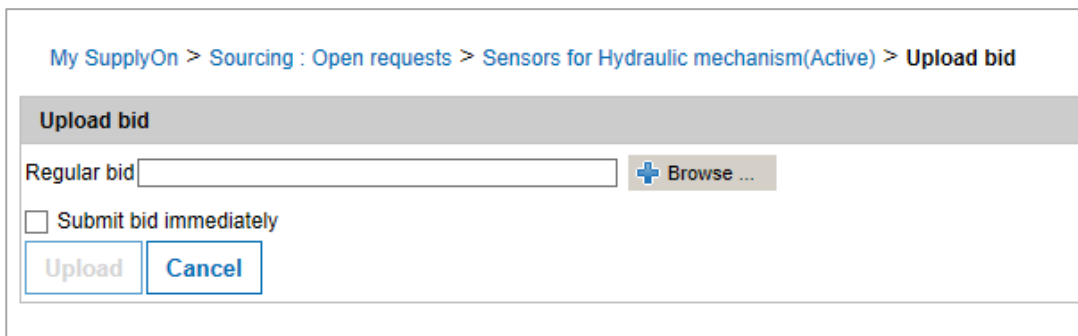


Figure: **Upload bid**

3.3 Adding attachments

You can add your attachments at any time in the section **Supplier response fields**. There is no limit, the customer decides which file types are allowed.

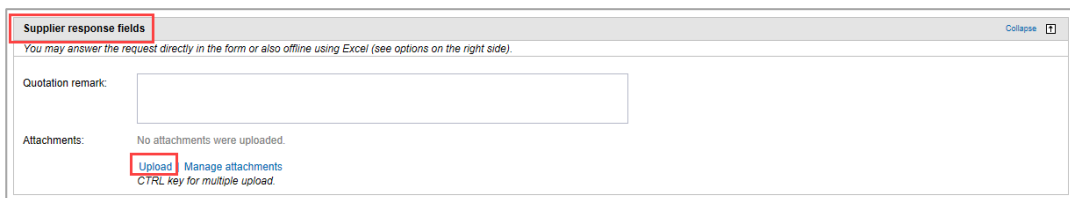


Figure: Sourcing: Open requests / **Supplier response fields**

3.4 Editing a Cost Breakdown Sheet (CBS)

Each request may look different. Some have a CBS, others don't. The cost breakdown sheets differ per customer.

If a second tab appears in the bid positions, there is a CBS available.

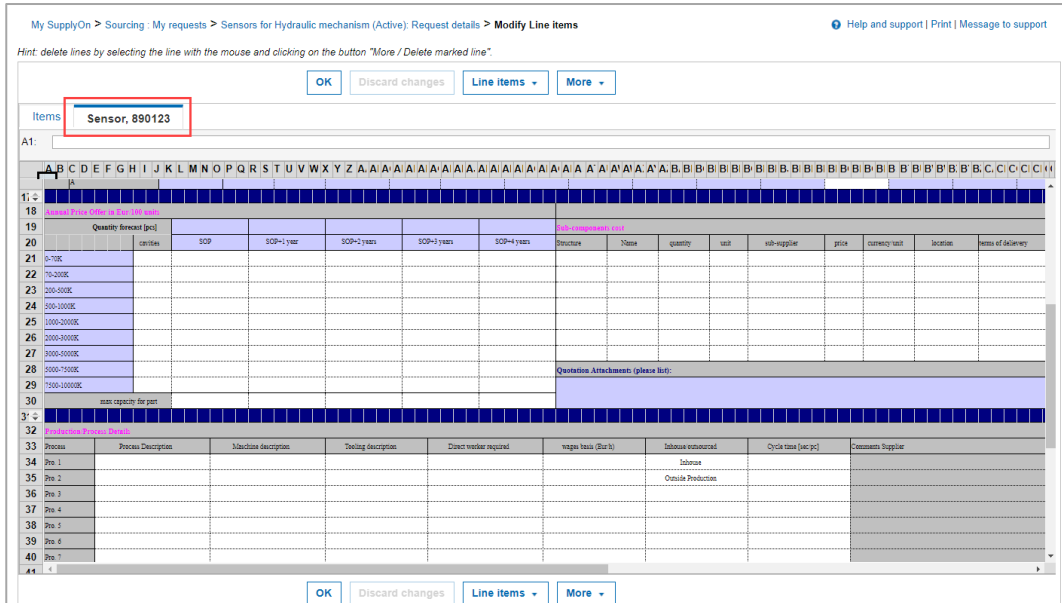


Figure: Sourcing: My requests / Modify Line Items / Cost Break Down Sheet

Note: only if all mandatory fields in the CBS are filled out, the bid can be submitted.

3.5 Start a discussion

You can start a so-called object-related discussion with your customer. For example, if you still need technical specifications from your customer, do not request them via your personal e-mail account, but instead start a discussion in SupplyOn.

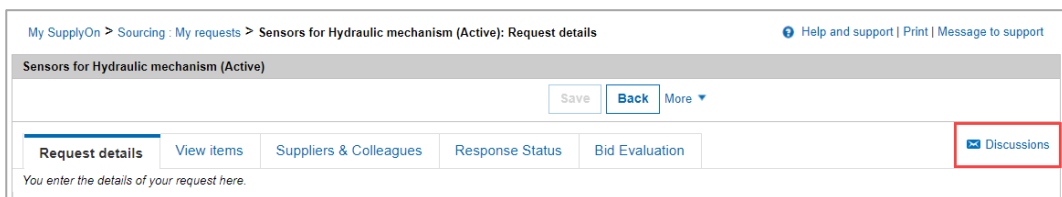


Figure: Sourcing: My requests / Requests details / Discussions

Advantage: all Sourcing users see the open discussions and have immediate access to the relevant data.

4 How do I read my rating data? (Performance Manager)

Your customer collects internal evaluation data that is valid for all suppliers. Usually the delivery performance, correct quantity and punctual delivery, as well as ppm's or the punctual processing of Sourcing bids are evaluated. Each customer has his own evaluation system and key figures.

This data is sent to SupplyOn once a month and graphically prepared for you.

The Customer Responsible receives an e-mail from the SupplyOn Portal. The company administrator for SupplyOn can define the customer responsible and determine which person is responsible for which customer. If you have any questions, please contact your administrator.

This handout serves as a reminder and does not claim to be complete. Therefore, not all steps are described in detail, only individual points are highlighted.

Please note that the settings of your customers may differ from those of the illustrations.

1. Open the E-Mail
2. Click the link.
3. Enter your User ID and password

4.1 Overview

The screen with the overview is displayed.

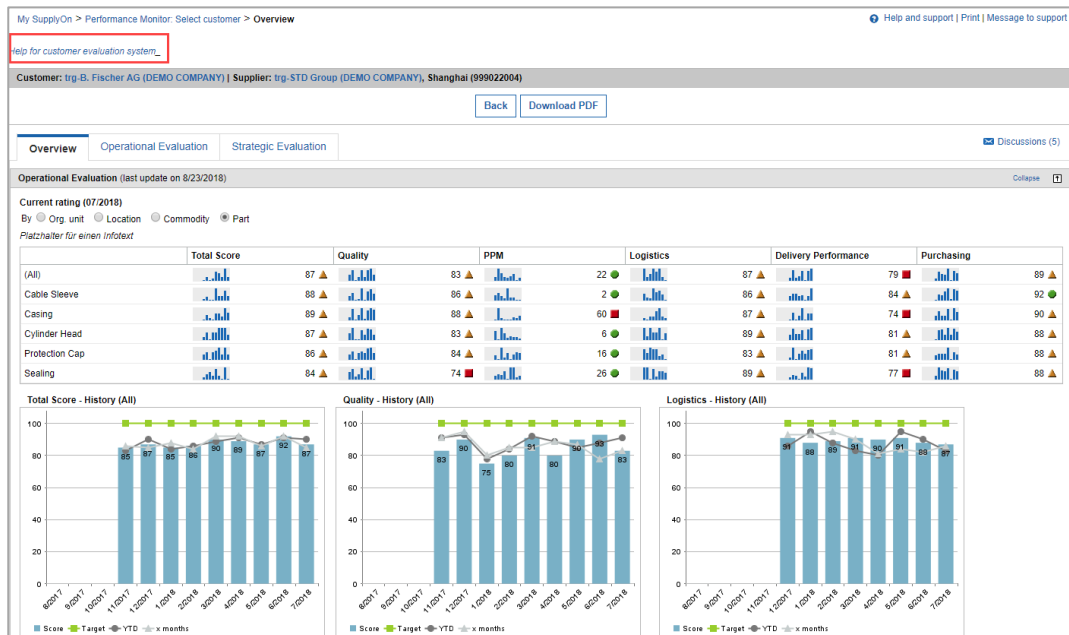
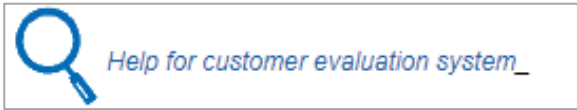


Figure: Performance Monitor: Select customer >Overview / Help for customer evaluation system

Note: We recommend to first read the document 'Help on the customer's rating system'.



The composition of the key figures and the resulting status is determined individually by each customer.

To support you in your continuous improvement process you will find at the end of the page 'Overview' the 'Worst results of the current evaluation'.

Worst results of current rating							
Quality	Division B	Asia-Pacific/Rest of the world	miniature loudspeaker	Sealing	07/2018		60
	Division B	Germany	miniature loudspeaker	Cable Sleeve	07/2018		60
	Division A	Asia-Pacific/Rest of the world	signal buzzer	Protection Cap	07/2018		60
	Division A	Germany	signal buzzer	Sealing	07/2018		64
Logistics	Division B	Germany	signal buzzer	Sealing	07/2018		66
	Division B	Germany	signal buzzer	Cylinder Head	07/2018		70
	Division A	Germany	signal buzzer	Protection Cap	07/2018		71
	Division B	Asia-Pacific/Rest of the world	signal buzzer	Sealing	07/2018		72
Purchasing	Division B	Germany	miniature loudspeaker	Protection Cap	07/2018		72
	Division A	Asia-Pacific/Rest of the world	miniature loudspeaker	Casing	07/2018		73
	Division B	Germany	signal buzzer	Cylinder Head	07/2018		80
	Division A	Asia-Pacific/Rest of the world	signal buzzer	Casing	07/2018		80
Purchasing	Division A	Asia-Pacific/Rest of the world	miniature loudspeaker	Cable Sleeve	07/2018		80
	Division A	Germany	miniature loudspeaker	Cylinder Head	07/2018		80
	Division B	Asia-Pacific/Rest of the world	signal buzzer	Protection Cap	07/2018		81

Figure: Performance Monitor: Select customer > Overview / Worst results of current rating

You can download the overview as a pdf document at any time.

My SupplyOn > Performance Monitor: Select customer > Overview Help and support | Print | Message to support

Help for customer evaluation system_

Customer: trg.B. Fischer AG (DEMO COMPANY) | Supplier: trg-STD Group (DEMO COMPANY), Shanghai (999022004)

[Back](#) [Download PDF](#)

Overview | Operational Evaluation | Strategic Evaluation Discussions (5)

Operational Evaluation (last update on 8/23/2018) Collapse

Current rating (07/2018)
By Org. unit Location Commodity Part

Platzhalter für einen Infotext

	Total Score	Quality	PPM	Logistics	Delivery Performance	Purchasing
(All)		87 ▲		83 ▲		22 ●
Cable Sleeve		88 ▲		86 ▲		2 ●
Casing		89 ▲		88 ▲		60 ●
Cylinder Head		87 ▲		83 ▲		6 ●
Protection Cap		86 ▲		84 ▲		16 ●
Sealing		84 ▲		74 ■		26 ●

Figure: Performance Monitor: Select customer > Overview / Download PDF

4.2 Operational Evaluation

4. Open the Operational Evaluation

In the Operational Evaluation you can display all the details with a single click.

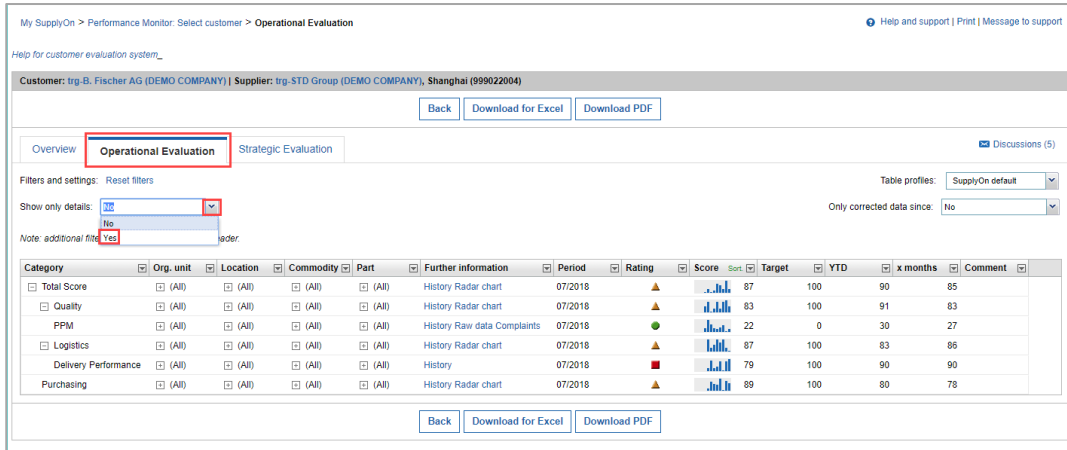


Figure: Performance Monitor: Select customer > **Operational Evaluation**

You can view historical data, raw data and, if the customer uses this functionality, complaints.

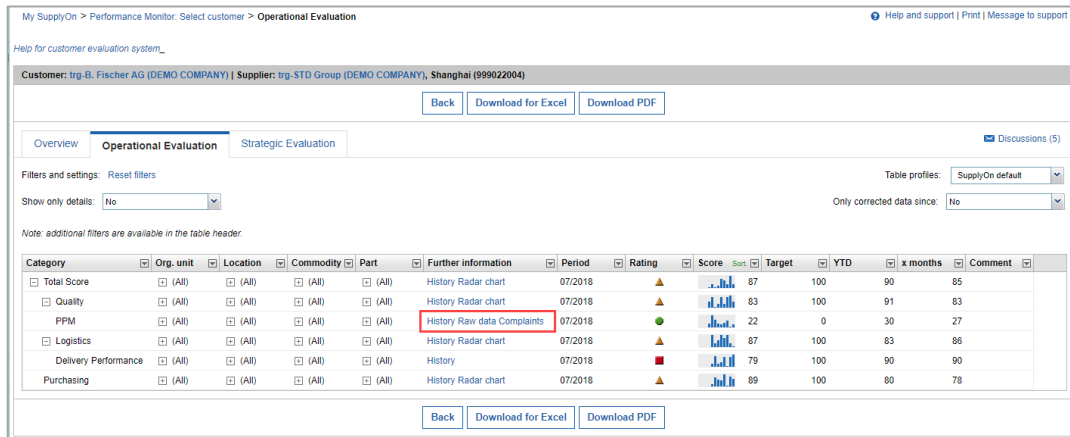


Figure: Performance Monitor: Select customer > Operational Evaluation / **History, Raw Data, Complaints**

From the **History**, you can start a discussion with your customer, often referred to as 'social collaboration'.

My SupplyOn > Performance Monitor: Select customer > Operational Evaluation > History

Customer: trg-B. Fischer AG (DEMO COMPANY) | Supplier: trg-STD Group (DEMO COMPANY), Shanghai (999022004)

Category: PPM
Part: (All)
Org. unit: (All)
Period: 07/2018
Location: (All)
Commodity: (All)

Back More ▾

History Raw data Complaints Discussions

Period	Rating	Score	Target	YTD	x months	Comment
07/2018	●	22	22	0	30	27
06/2018	●	15	15	0	20	17
05/2018	▲	34	34	0	42	38
04/2018	●	27	27	0	29	28
03/2018	●	22	22	0	27	27
02/2018	●	24	24	0	27	27
01/2018	●	36	36	0	42	41
12/2017	▲	49	49	0	53	51
11/2017	●	25	25	0	27	27

9 Entries Rows per page 12 First Previous Page 1 of 1 Next Last

Figure: Performance Monitor: Select customer > Operational Evaluation / History / **Discussions**

The filtering of evaluation data is possible.

Overview Operational Evaluation Strategic Evaluation Discussions (5)

Filters and settings: Reset filters Table profiles: SupplyOn default

Show only details: No Only corrected data since: No

Note: additional filters are available in the table header.

Category	Org. unit	Location	Commodity	Part	Further information	Period	Rating	Score	Target	YTD	x months	Comment
Total Score	(All)	(All)	(All)	(All)	Sort ascending History Radar chart	07/2018	▲	87	100	87	100	Sort from best to worst
Quality	(All)	(All)	(All)	(All)	Sort descending History Radar chart	07/2018	▲	63	100	63	100	Sort from worst to best
PPM	(All)	(All)	(All)	(All)	Filter Select all	07/2018	●	22	0	22	30	Filter
Logistics	(All)	(All)	(All)	(All)	History miniature loudspeaker	07/2018	▲	87	100	87	100	86
Delivery Performance	(All)	(All)	(All)	(All)	History signal buzzer	07/2018	■	79	100	79	100	90
Purchasing	(All)	(All)	(All)	(All)	History History Radar chart	07/2018	▲	89	100	89	100	78

Back Download for Excel Download PDF

Figure: Performance Monitor: Select customer > Operational Evaluation / **Filter Criteria**

You can save the settings as a table profile

My SupplyOn > Performance Monitor: Select customer > Operational Evaluation

Customer: trg-B. Fischer AG (DEMO COMPANY) | Supplier: trg-STD Group (DEMO COMPANY), Shanghai (999022004)

Overview Operational Evaluation Strategic Evaluation Discussions (5)

Filters and settings: Reset filters Table profiles: SupplyOn default

Show only details: No Only corrected data since: No

Note: additional filters are available in the table header.

Category	Org. unit	Location	Commodity	Part	Further information	Period	Rating	Score	Target	YTD	x months	Comment
Total Score	(All)	(All)	(All)	(All)	History Radar chart	07/2018	▲	87	100	87	100	85
Quality	(All)	(All)	(All)	(All)	History Radar chart	07/2018	▲	63	100	63	100	83
PPM	(All)	(All)	(All)	(All)	History Raw data Complaints	07/2018	●	22	0	22	30	27
Logistics	(All)	(All)	(All)	(All)	History Radar chart	07/2018	▲	87	100	87	100	86
Delivery Performance	(All)	(All)	(All)	(All)	History	07/2018	■	79	100	79	100	90
Purchasing	(All)	(All)	(All)	(All)	History Radar chart	07/2018	▲	89	100	89	100	78

Back Download for Excel Download PDF

Figure: Performance Monitor: Select customer > Operational Evaluation / **Table profiles**

