

Handout for the SupplyOn Service Supply Chain Collaboration

Working with orders and the related confirmation



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1 About this Manual

The content of this manual shows you how to work with purchase orders sent by your customer from their ERP system to the SupplyOn application.

Abbreviations

Abbreviation	Meaning
CSV	Comma Separated Values
EDI	Electronic Data Interchange
ERP	Enterprise-Resource-Planning
MS	Microsoft
SCC	Supply Chain Collaboration
VMI	Vendor Managed Inventory
XLSX	Excel 2010

2 How to access SupplyOn

To work with SupplyOn your company administrator needs to set-up an account and initial password for you. The administrator will assign the appropriate roles to you ([see chapter 8, Roles and Rights](#)).

As soon as your customer creates or changes an order in his ERP system, the SupplyOn application sends an automatically generated e-mail notification to the e-mail address stored in your user account.

You can register with SupplyOn via the e-mail notification you received by

1. clicking on **view details** link – opens the order
2. by clicking on the **Supply Chain Collaboration process** link – opens the Dashboard

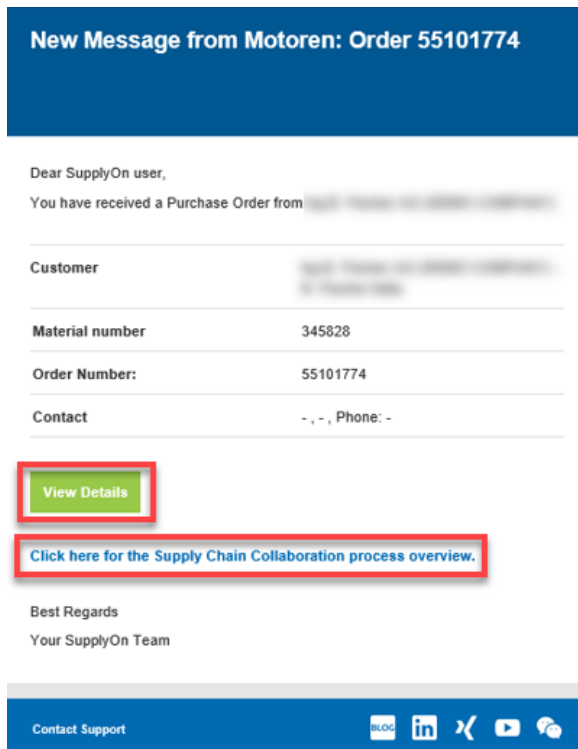


Figure: Automatically generated E-Mail notification

3. Alternatively, you can open an internet-browser and log in to SupplyOn.

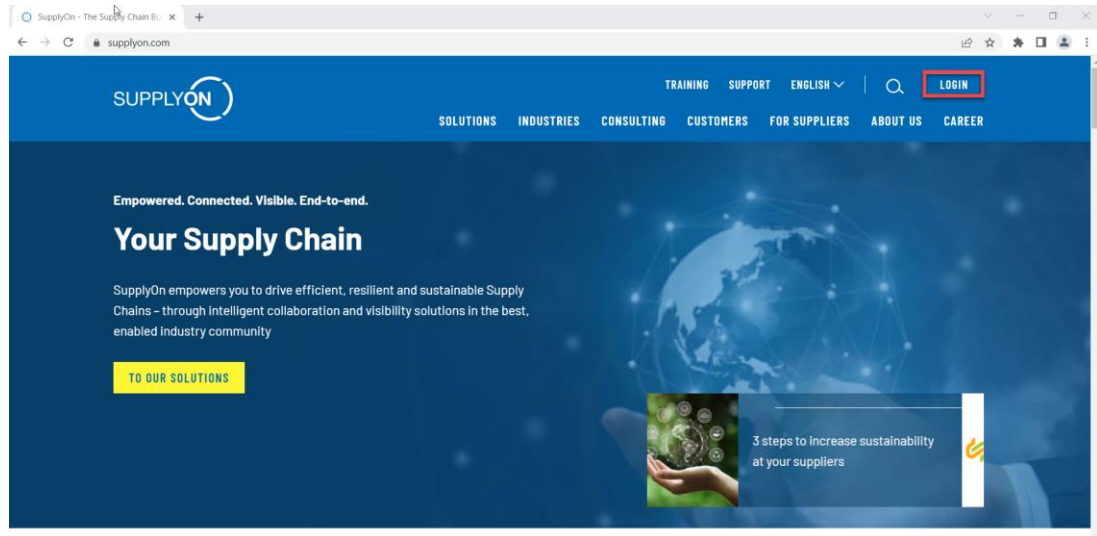


Figure: SupplyOn home page with Login button

Depending on your roles, you may see different tiles than shown in the following screenshots.

4. Click the tile **Supply Chain Collaboration**

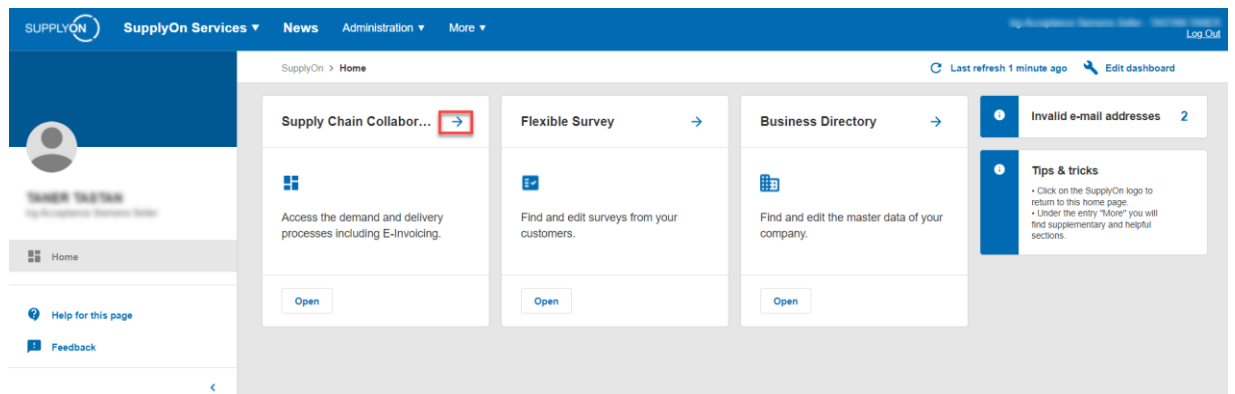


Figure: Home screen with tiles per application and actual notifications

3 How to work with the Dashboard

The **Dashboard** is displayed.

Depending on your roles, you may see different tiles than shown in the following images.

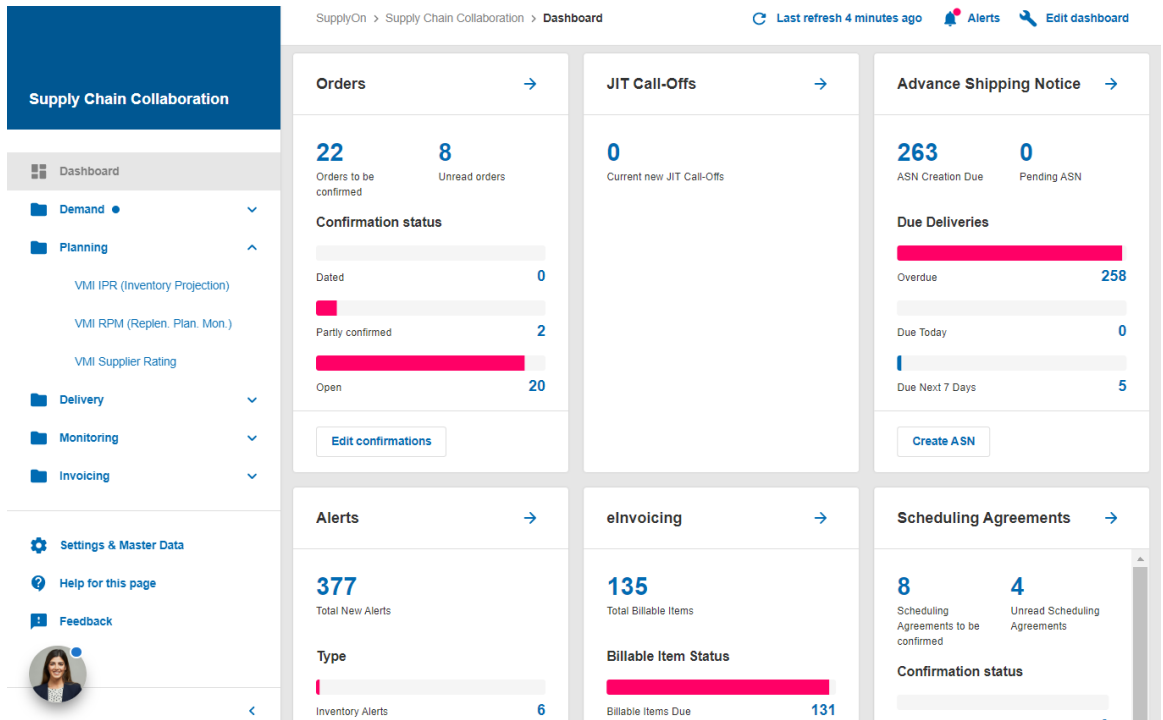


Figure: **Dashboard**

3.1 What can I see in the “Orders” tile?

Within the Orders tile you can see an overview of newly received orders.

- ✓ Dated – these orders have since been changed by the customer.
- ✓ Partially confirmed – these orders have not yet been fully confirmed.
- ✓ Open – these orders have not yet been confirmed.
- ✓ Clicking on → opens an overview of all orders.

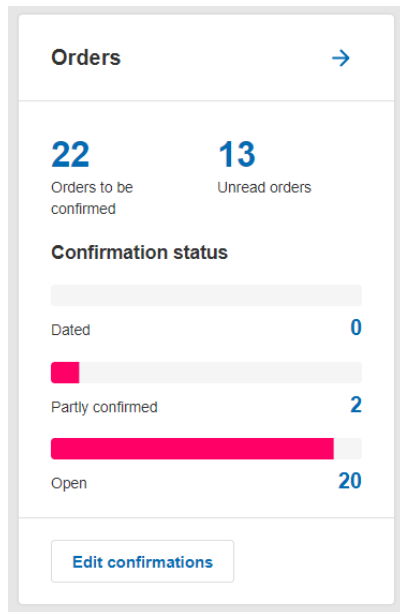


Figure: Dashboard / tile / Orders

3.2 How to view an order

1. To get an overview of all orders click on →

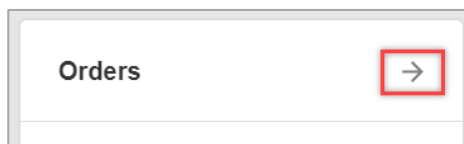


Figure: Dashboard / tile / Orders

All orders so far received are displayed.

- Each column provides relevant information regarding each individual order. Slide the scroll bar in the bottom to see more details. If you want to see information not shown in the current view you can create a custom view with additional columns ([See section 6](#)).

	Read	Order date	Order	Order status	Confirmation	Customer site	Customer
<input type="checkbox"/>	Read	2023/10/28	4510292585TTA	Initial	⚠️ Required		
<input type="checkbox"/>	Read	2023/10/28	4510292584TTA	Initial	⚠️ Required		
<input type="checkbox"/>	Read	2023/10/28	4510292584	Initial	⚠️ Required		
<input type="checkbox"/>	Unread	2023/10/28	4579292584	Initial	⚠️ Required		
<input type="checkbox"/>	Unread	2023/10/28	4578292584	Initial	⚠️ Required		

Figure: Orders / Overview

- Order changes are marked by the status “Updated” in the Order Status Column

	Order	Material	Confirmation	Order status	Read	Customer	Customer site	Order date
<input type="checkbox"/>	55101801	345828	Not required	Completely confirmed	Read			2023/04/02
<input type="checkbox"/>	55101800	345828	Not required	Updated	Read			2023/04/02
<input type="checkbox"/>	55101799	345828	Not required	Completely confirmed	Read			2023/04/02
<input type="checkbox"/>	55101798	345828, 890128	⚠️ Required	Partially confirmed	Read			2023/04/02
<input type="checkbox"/>	55101797	345828, 890128	Not required	Completely confirmed	Read			2023/04/02
<input type="checkbox"/>	55101802	345828	Not required	Updated	Read			2023/04/02
<input type="checkbox"/>	55101796	345828	⚠️ Required	Initial	Read			2023/04/02
<input type="checkbox"/>	55101803	345828	⚠️ Required	Initial	Read			2023/04/02
<input type="checkbox"/>	55101846	345828, 890128	Not required	Completely confirmed	Read			2023/03/12

Figure: Updated orders

- To see the details per item line in each Purchase Order, click on **Order line items**.

	Order number	Line Item	Material number	Confirmation	Customer	Requested del. date
<input type="checkbox"/>	4510292585TTA	000010	A5W00078797	⚠️ Required		2023/03/06
<input type="checkbox"/>	4510292585TTA	000020	A5W00078797	⚠️ Required		2023/04/03
<input type="checkbox"/>	4510292585TTA	000030	A5W00078797	⚠️ Required		2023/05/06
<input type="checkbox"/>	4510292585TTA	000040	A5W00078797	⚠️ Required		2023/06/05
<input type="checkbox"/>	4510292584TTA	000010	A5W00078797	Not required		2023/03/06
<input type="checkbox"/>	4510292584TTA	000020	A5W00078797	Not required		2023/04/03
<input type="checkbox"/>	4510292584TTA	000030	A5W00078797	Not required		2023/05/06

Figure: Order line items overview

The order items are listed in rows with each row showing information about the line item in each Purchase Order e.g., Material Number, Requested Delivery Date, Supplier Reference, etc.

5. You can download (as CSV) each order separately by clicking **Download > Download order > Default Profile CSV**

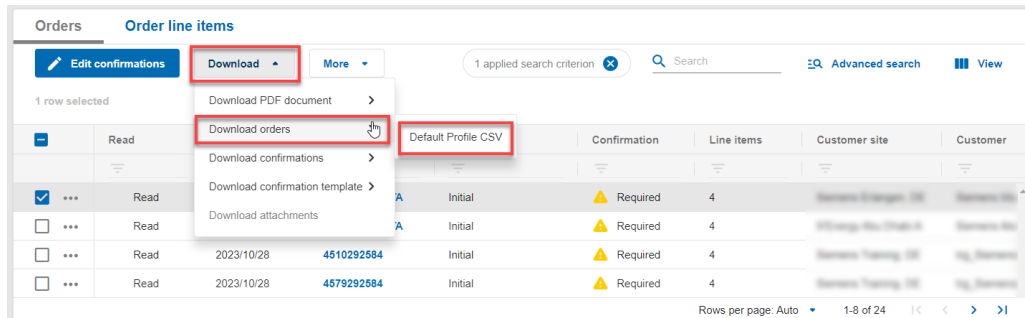


Figure: Orders details / with action buttons to download orders

You can also select multiple orders at once to download.

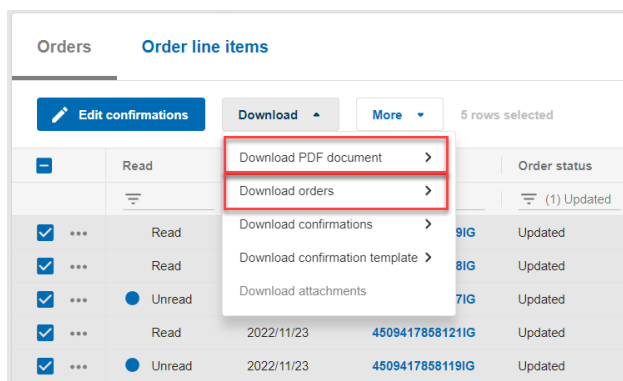


Figure: Orders details / with action buttons to download orders

4 How to confirm an order

As already shown, there are different ways of accessing unconfirmed orders. You may want to check the order first before you confirm.

4.1 How to check the order details

1. Open the **Dashboard**
2. In the **Orders** tile, click **Unread Orders**

The **Order line items** overview is opened. Slide the scroll bar in the bottom to check all information the customer has given, if you want to see information not shown in the current view you can create a custom view with additional columns ([See section 6](#)).

Orders		Order line items						
Read		Order date	Order	Order status	Confirmation	Customer site	Customer	
<input type="checkbox"/>	Unread	2022/11/23	4509417858127IG	Updated	Required	Werksite Training 08	Ag. Bedrijven 1	
<input type="checkbox"/>	Unread	2023/01/15	4509417858126IG	Initial	Required	Werksite Training 08	Ag. Bedrijven 1	
<input type="checkbox"/>	Unread	2023/01/15	4509417858123IG	Initial	Required	Werksite Training 08	Ag. Bedrijven 1	
<input type="checkbox"/>	Unread	2023/01/15	4509417858122IG	Initial	Required	Werksite Training 08	Ag. Bedrijven 1	
<input type="checkbox"/>	Unread	2022/11/23	4509417858119IG	Updated	Required	Werksite Training 08	Ag. Bedrijven 1	
<input type="checkbox"/>	Unread	2022/11/23	4509417858118IG	Updated	Required	Werksite Training 08	Ag. Bedrijven 1	

Figure: **Orders line items details**

After you have checked the order, you can proceed to the order confirmation as described in the following section.

4.2 Confirm as ordered (“Confirm as-is”)

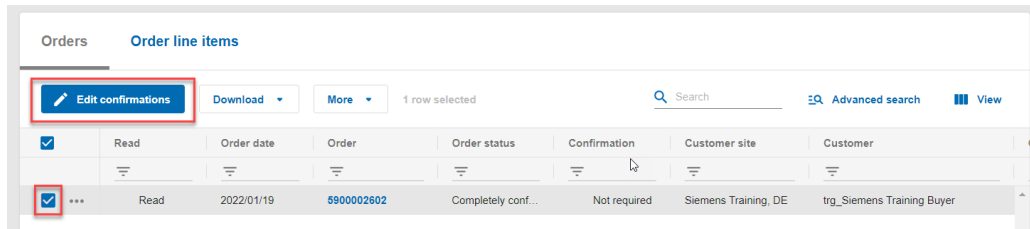


Figure: Orders details / Line Items tab

1. Mark the order to be confirmed and then click on **Edit confirmations**.
2. Check the desired **delivery date**, the corresponding **quantity**, and the **price per price unit**.
3. Fill out the mandatory field supplier reference and enter, for example, your internal reference number for this order.
4. Click Send Confirmations.

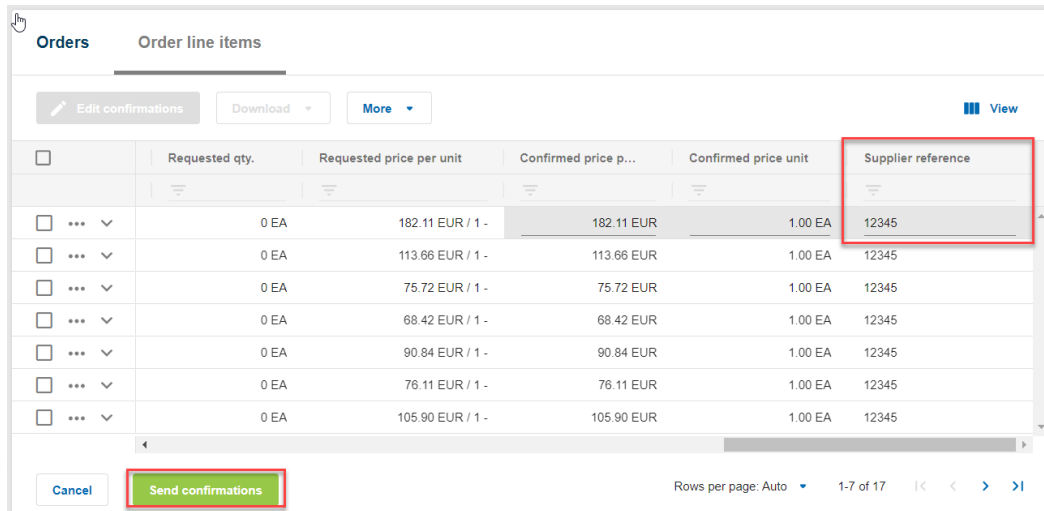


Figure: Order items - Confirm "As requested".

4.3 Confirm deviating (“Respond with changes”)

You want to confirm deviating, e.g., delivery date and / or quantity need to be changed.

1. Mark the order to be confirmed and then click on **Edit confirmations**.
2. Check the desired delivery date, the corresponding **quantity**, as well as the **price per price unit**.
3. Overwrite the gray entries in the columns **delivery date**, **delivery quantity** and/or **price per price unit**.
4. Change the **confirmed quantity**.
5. The material can also be transported in separate deliveries, if this is required, click on **Split Schedule**.
6. Enter a new **delivery date** and the remaining **quantity**.
7. Fill in required mandatory fields which are marked in yellow, e.g., enter your internal **reference number** for this order.
8. Click **Save & Send**.

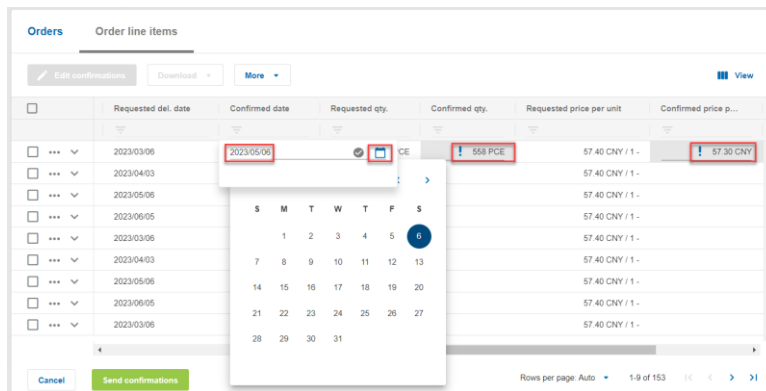


Figure: Order items - Confirm "With changes".

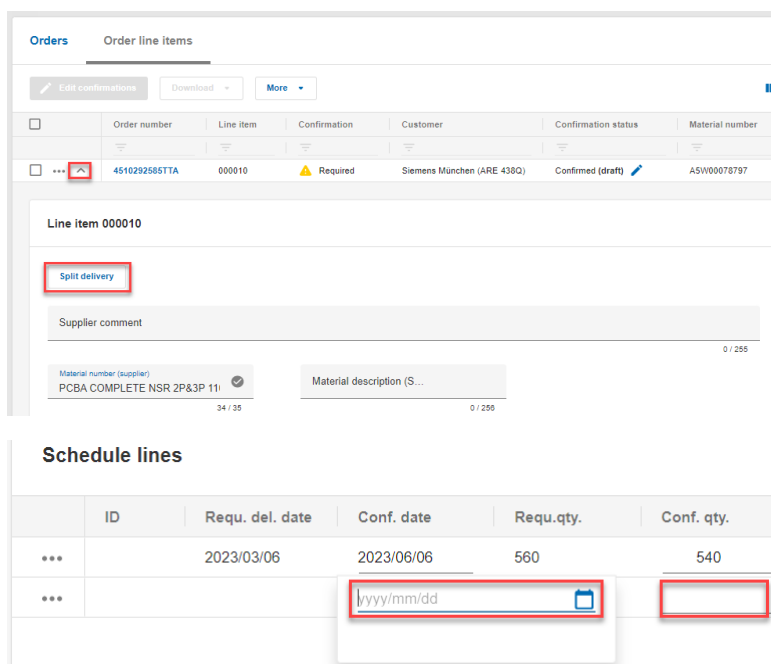


Figure: Order items - confirm "with changes" - split schedule lines

4.4 Why do I have to reconfirm an already confirmed order?

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

The Dashboard supports you in identifying the updated orders. You can see these changes from the number of “outdated” orders.

1. Open the **Dashboard**
2. Click on **Dated**

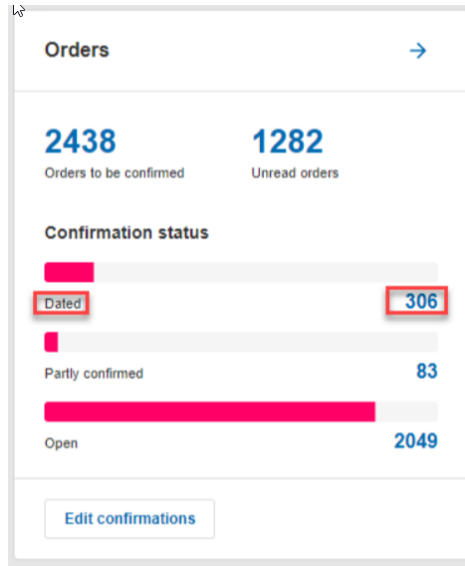


Figure: **Dashboard / tile / Confirmable Orders / Dated**

You get to the order overview with your dated orders.

Please note: Dated orders may either have been updated or cancelled. It is necessary to reconfirm the former.

Read	Order	Order status	Confirmation status
Unread	4549925783_E	Updated	Dated
Unread	4549925785_E	Updated	Dated
Unread	4549925814_E	Cancelled	Dated

Figure: **Orders / Dated Orders**

5 How to download a confirmation template and upload order confirmations

Instead of confirming the orders one by one you can use the down- and upload function to confirm different orders in one step.

There are two ways:

- ✓ working with MS Excel XLSX
- ✓ or with the csv format.

In this guide we explain how to work with MS Excel.

How can I use the XLSX confirmation template?

If you want to confirm more than one order in the web application, you can work with MS Excel.

1. Open the **Dashboard**
2. In the **Orders** tile, click **“Orders to be confirmed”**.
3. Select all the orders you want to confirm by ticking the box on the left; you can also confirm all open orders by selecting the box in the header row.
4. Click **Download, Download confirmation Template** and **Standard confirmation template (.xlsx)**

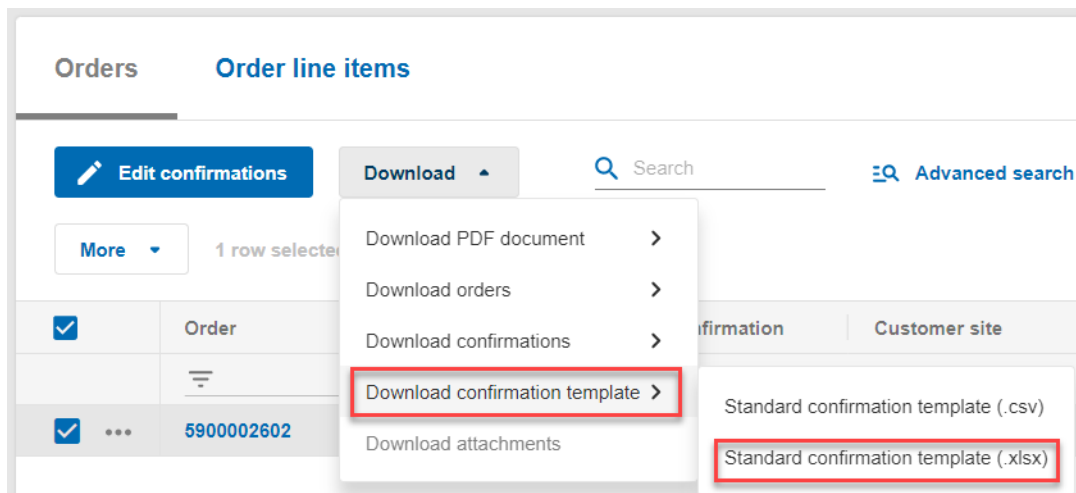


Figure: Orders / Download / Confirmation Template / XLSX

5. Open the **XLSX** file
6. Check the **Order Number(s)**
7. Decide if you leave or change the **Price per unit, Delivery date(s)** and **Delivery quantity**
8. Enter your **Internal Supplier Number**
9. **Save** your XSLX file

Organization	Plant identification	Order Number	Order position number	Buyer Material Number	Requested delivery date	Delivery quantity	Quantity unit	Price per unit	Price Unit	Currency	Internal Supplier Number	ICP
S_TRG	100_1000	5900002602	00004	MW13079C	07.05.2020	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	10.09.2021	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	10.09.2021	63	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	24.11.2021	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	14.01.2022	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	21.03.2022	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	03.06.2022	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	24.02.2023	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	19.05.2023	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	20.09.2023	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00004	MW13079C	14.12.2023	116	EA	182,11	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	20.11.2020	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	03.03.2021	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	12.05.2021	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	27.08.2021	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	01.11.2021	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	23.12.2021	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	31.01.2022	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	05.04.2022	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	03.06.2022	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	20.01.2023	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	22.03.2023	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	14.07.2023	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	21.08.2023	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	23.11.2023	100	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00006	MW13081C	13.12.2023	0	EA	113,66	1	EUR	12345	
S_TRG	100_1000	5900002602	00007	MW13082C	11.10.2019	100	EA	75,72	1	EUR	12345	

Figure: MS Excel / Confirmation Template / with mandatory fields to check

10. Go back into the **Web Application**.
11. Click **More > Upload Confirmations > Upload confirmations (.xlsx)**

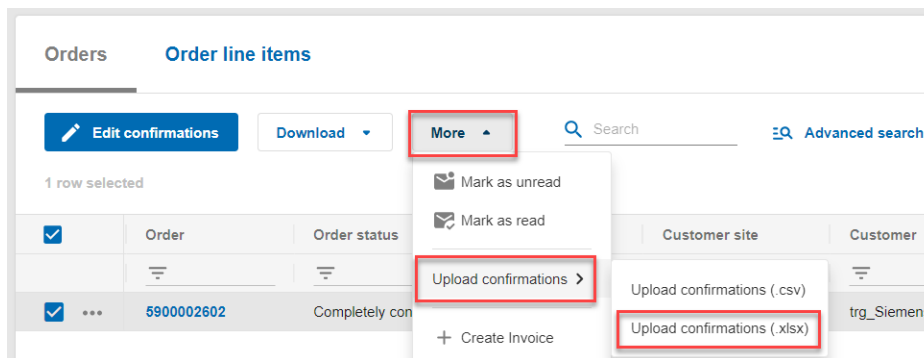


Figure: Orders / Upload / Order Confirmation (xlsx)

12. Click in the box to browse a file or drag and drop your chosen document.

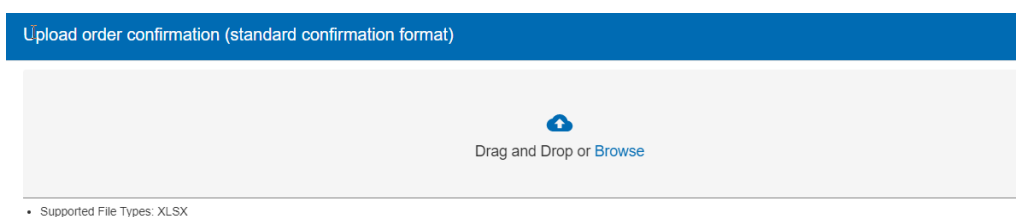


Figure: Orders confirmation upload / Choose file from Desktop

13. Open the folder **Downloads**, select the **XLSX** file and click **Open**

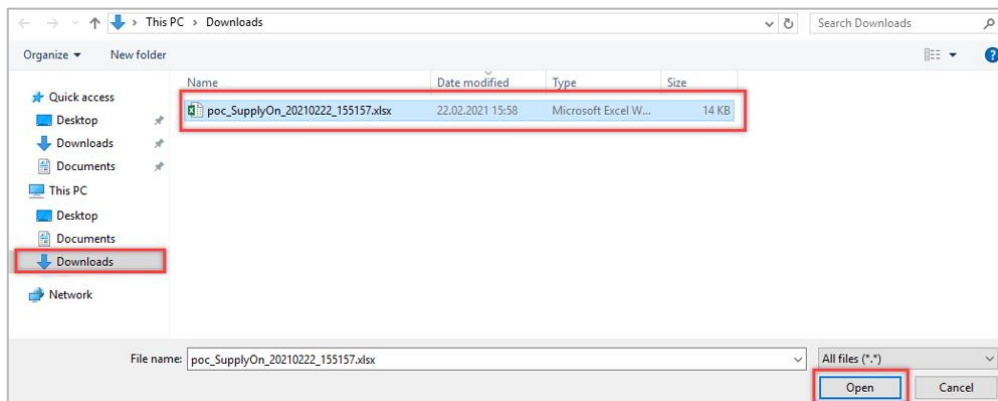


Figure: **Select template**

14. **Upload** the confirmation template.

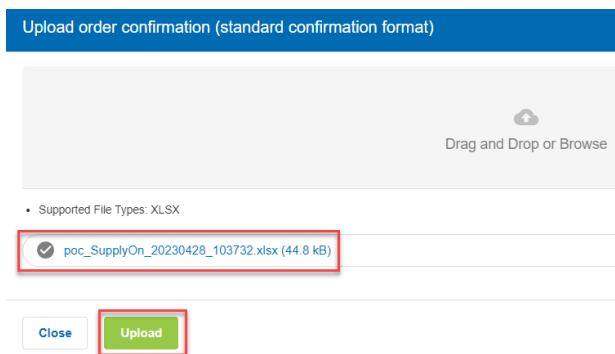


Figure: **Upload template**

This way you are able to confirm as many orders as you want to in one step.

You can find a technical format description of the upload template here:

[file format descriptions](#)

6 Configure my view

To facilitate your work in SupplyOn, you have the option of setting up personal views. We recommend using this in the **Orders** overview.

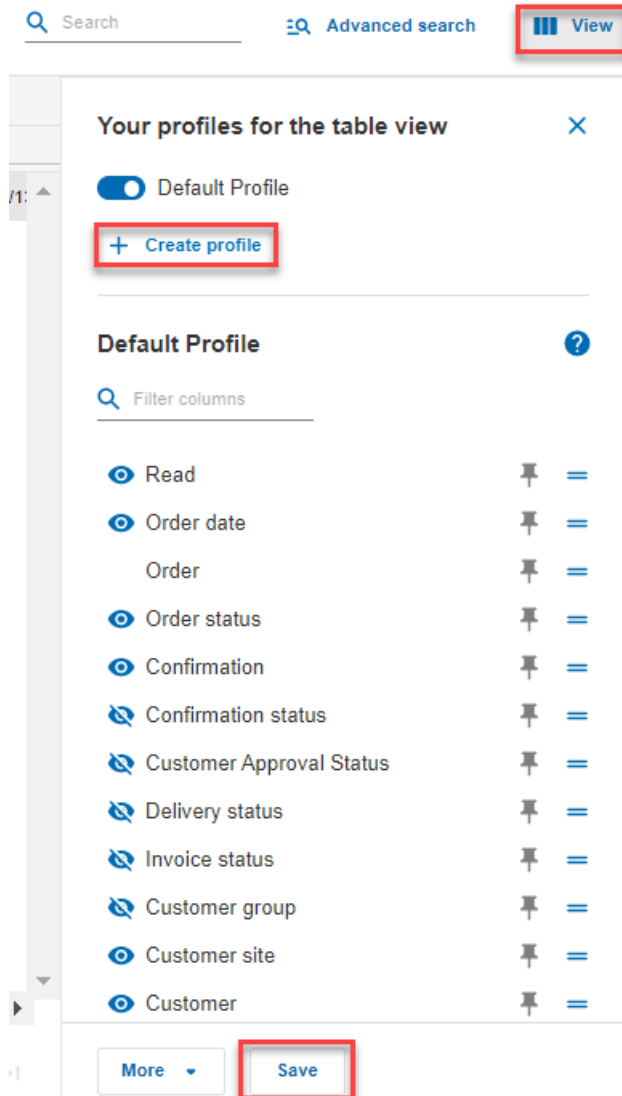


Figure: Orders screen / Default View and Manage View

For details how to configure a screen please open the [media library](#) and search for the tutorial **Tips for search and configure my view**.

7 How to create a process-based alert

SupplyOn supports you in complying with the logistics KPIs. As explained [here](#), you can see your current to-dos in the dashboard in the different order tiles. Additionally, you can set up an individual email alert for specific situations. This ensures that confirmation due or other dates are no longer overlooked and logistics KPIs can be better met.

1. Open the **Dashboard**
2. Click **Alerts**
3. Select **Demand Alerts**

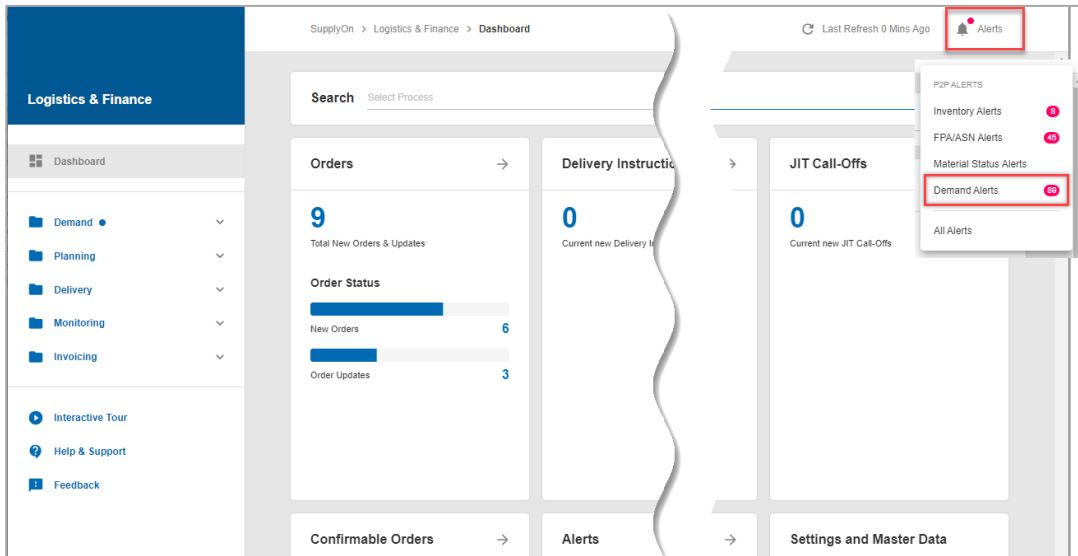


Figure: Dashboard / Alerts

Define a search profile you are interested in. This example is about finding out where a confirmation is overdue.

In this example, a view has been created ([see chapter 6](#)). The column **Days not confirmed** has been moved next to the column **Status**.

Buyer	Plant Code	Plant Buyer	Planner	Order Number	Order	Document Type	Material	Material Desc.	Status	Days not confirmed	Flag Dev.	Dev. Qty.	De
S_TRG	100_1000	Siemens Training		5500001000	00010	ASN	A02C0001001-1		Due Delivery overdue: ASN Creation overdue	2			
S_TRG	100_1000	Siemens Training		5500001001	00020	ASN	A02C0001002-2		Due Delivery overdue: ASN Creation overdue	2			
S_TRG	100_1000	Siemens Training	Purchaser	4550521808	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	585			
S_TRG	100_1000	Siemens Training	Purchaser	4550521851	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	719			
S_TRG	100_1000	Siemens Training	Andreas S.	4550520008	00020	ASN	A2V00001151689	RUNDSTAB-3	Due Delivery overdue: ASN Creation overdue	851			
S_TRG	100_1000	Siemens Training	Purchaser	4550521297	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	5			
S_TRG	100_1000	Siemens Training	Purchaser	4550521297	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	64			
S_TRG	100_1000	Siemens Training	Purchaser	4551321238	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	25			
S_TRG	100_1000	Siemens Training	Purchaser	5550091837	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	756			
S_TRG	100_1000	Siemens Training	Purchaser	4550521299	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	65			
S_TRG	100_1000	Siemens Training	Purchaser	4550521299	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	66			
S_TRG	100_1000	Siemens Training	Purchaser	4550521716	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	585			
S_TRG	100_1000	Siemens Training	Purchaser	4550521716	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	585			
S_TRG	100_1000	Siemens Training	Andreas S.	4550520008	00010	ASN	A2V00001151689	RUNDSTAB-2	Due Delivery overdue: ASN Creation overdue	905			
S_TRG	100_1000	Siemens Training	Purchaser	4550521916	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	371			
S_TRG	100_1000	Siemens Training	Purchaser	4550521470	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	369			

Figure: Alert Overview / with personalized view

4. Build your search profile by clicking **Add a line**
5. Select the Search criteria, for this example select **Status Confirmation**
6. And select the entry **Confirmation Status Overdue**

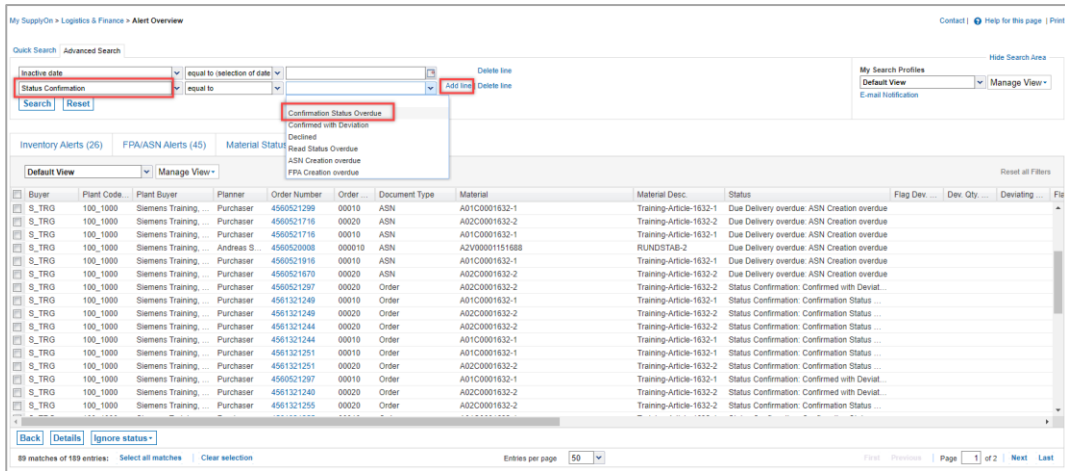


Figure: Alert Overview / with search criteria

7. Test your search parameters by clicking **Search**

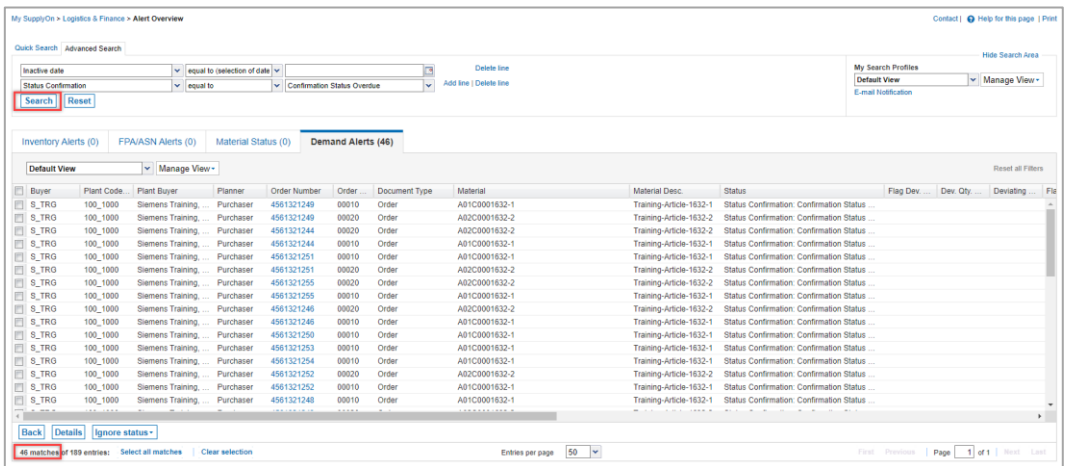


Figure: Alert Overview / Search result is displayed

You can save these search parameters as search profile and define the frequency of E-mail notifications for it. Define a name for your search parameters and save it.

8. Define a name for your **Search Profile**
9. Click on the **Drop Down** next to **Manage View**
10. and click **Create new**

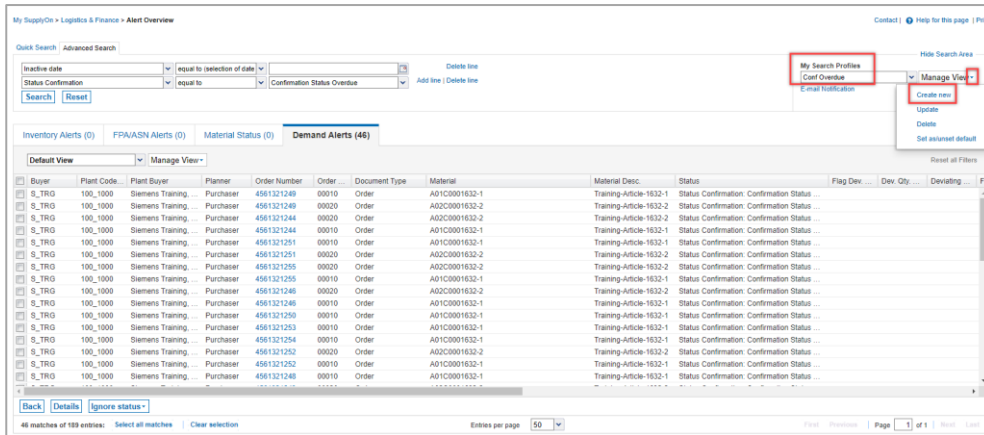


Figure: Alert Overview / Define and save Search Profile

11. Click **E-mail Notification**

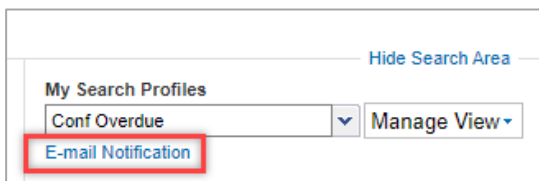


Figure: Alert Overview / Define E-mail Notification for Search Profile

12. The just created search profile is automatically selected
13. Set the tick next to **Active**
14. Define the notification period, for example on a daily basis at 8.00 am in the morning
15. Click **Save**

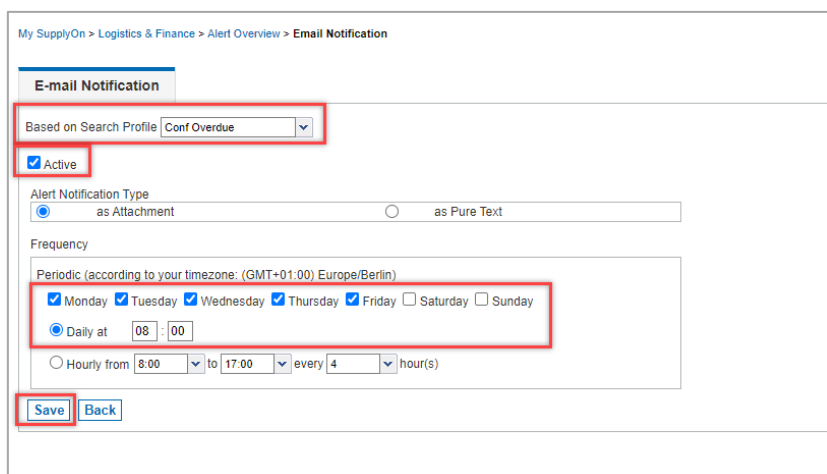


Figure: Alert Overview / E-mail Notification

In this example you will receive an e-mail notification every day.

8 Roles and Rights

The SupplyOn Company Admin is authorized to create new users or to assign roles to already existing users.

For working with the purchase order process the following area of responsibility is needed: **Order Fulfillment, Finance Processes.**

Areas of responsibility			
<input type="checkbox"/>	Name ↑	Description	More information
<input type="checkbox"/>	Company Administration	Company master data, users and permis...	More information
<input checked="" type="checkbox"/>	Order Fulfillment, Finance Processes	Supply Chain Management.	More information
<input type="checkbox"/>	Quality Management	Supplier Quality Management (QM).	More information
<input type="checkbox"/>	Sales	Sourcing to Contract, Progress to Order ...	More information
<input type="checkbox"/>	Shipping, Goods Receipts, Warehouse ...	Shipping, goods receipts, warehouse ma...	More information
<input type="checkbox"/>	Supply Chain Administration	Demand, logistics and finance processes.	More information

Figure: **User Management** with **Edit User** and **Areas of responsibility**

After clicking **More information**, the following help page is displayed. Here you can see the tasks the user can fulfill with this responsibility.

Order Fulfillment, Finance processes	
Logistics & Finance	
<input checked="" type="checkbox"/>	Displaying demand and logistics data
<input checked="" type="checkbox"/>	Editing purchase orders and call-off demands
<input type="checkbox"/>	Creating invoices
<input type="checkbox"/>	Editing finance processes

Figure: **Help page** with explanation for **Order Fulfillment, Finance processes** responsibility