Handout for the SupplyOn Service Logistics & Finance

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.

1.1 Abbreviations

Abbreviation	Meaning
CSV	Comma Separated Values
EDI	Electronic Data Interchange
ERP	Enterprise-Resource-Planning
MS	Microsoft
VMI	Vendor Managed Inventory
WebEDI	Web based EDI
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 log in to SupplyOn via the e-mail

1. by clicking on the details link – opens the order
2. by clicking on the WebEDI process link – opens the Dashboard

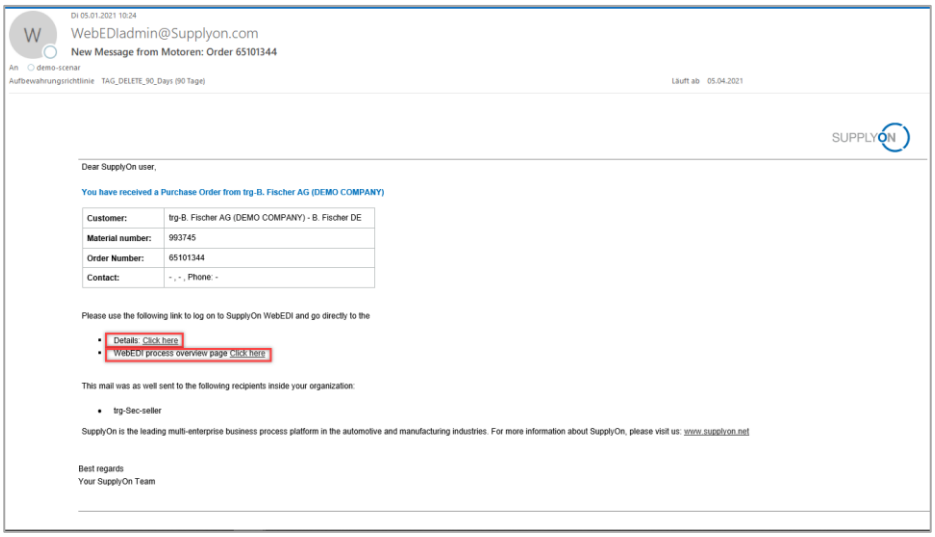


Figure: **Automatically generated E-Mail notification**

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

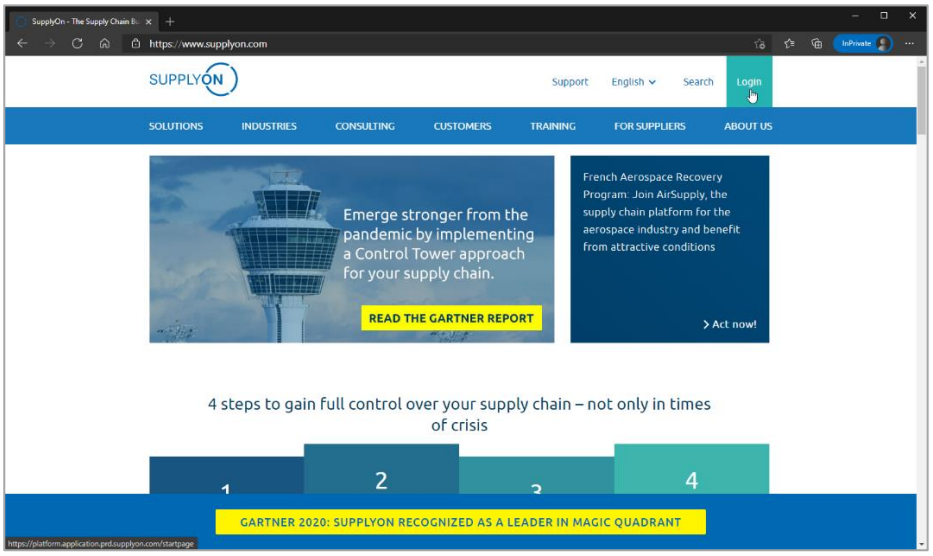


Figure: **SupplyOn home page with Login button**

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

4. Click the tile **Logistics & Finance**

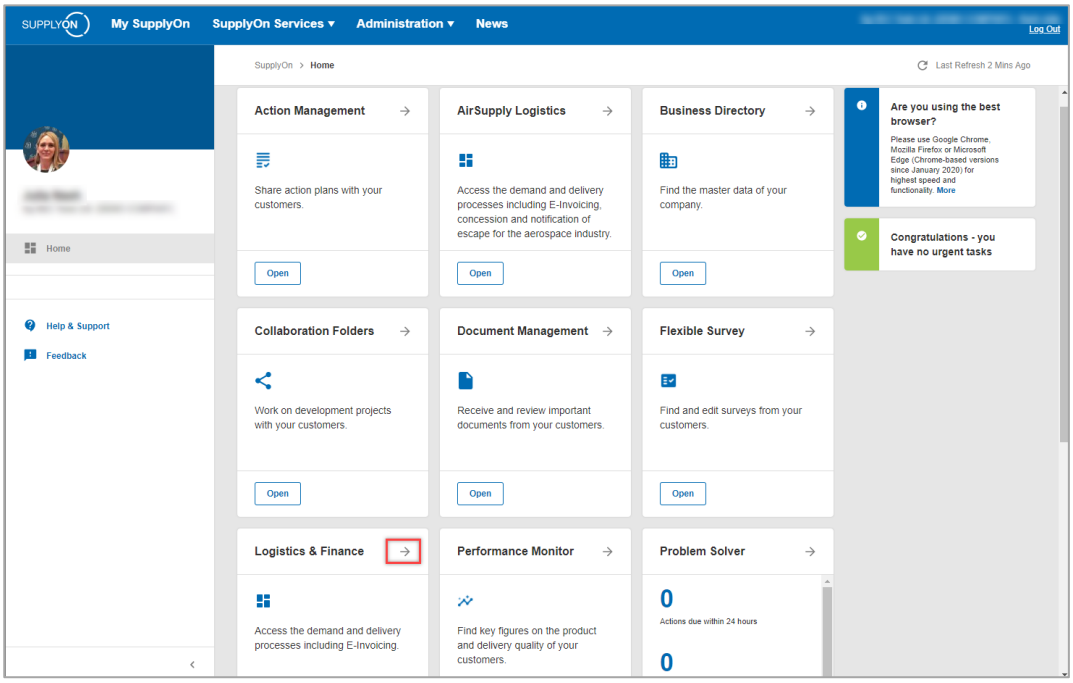


Figure: **Home** screen with **tiles** per application and actual **notifications**

3 How to work with the Dashboard

The **Dashboard** is displayed.

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

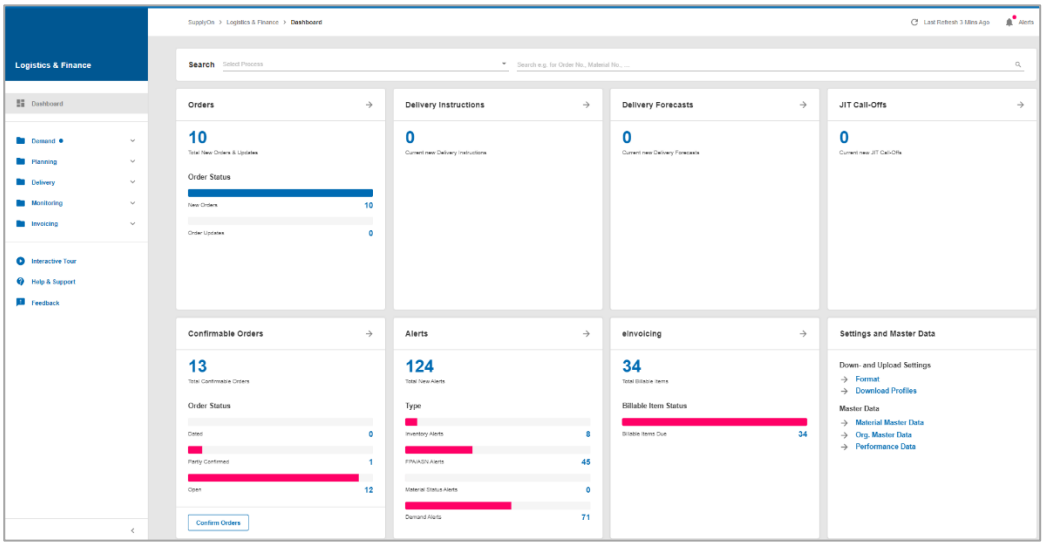


Figure: **Dashboard**

What can I see in the Orders tile?

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

- ✓ New Orders – these orders are not yet read
- ✓ Order Updates – Customer's changes of existing orders which have not been read yet
- ✓ →- a click here opens the overview of all orders

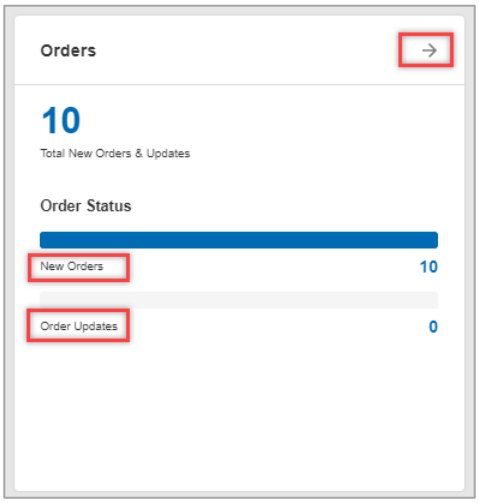


Figure: **Dashboard / tile / Orders**

3.1.1 How to view an order

1. To get an overview of all orders click **->**

Figure: **Dashboard / tile / Orders**

All orders so far received are displayed.

2. If you want to check the order details, open the corresponding order **by clicking on it anywhere in the line:**

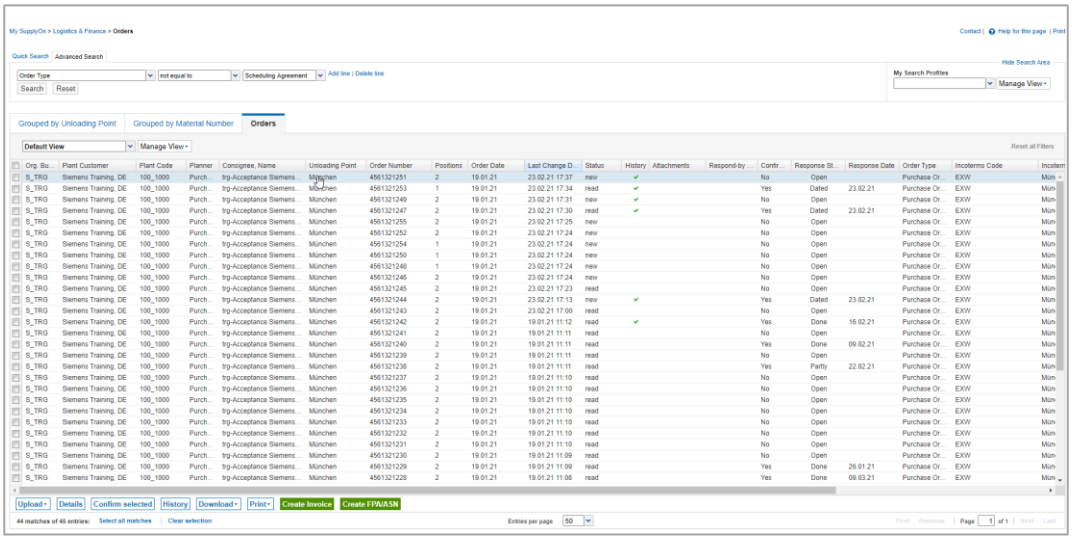


Figure: **Orders / Overview**

The order details screen is opened. In this example, the order consists of two line items, each with a different material number.

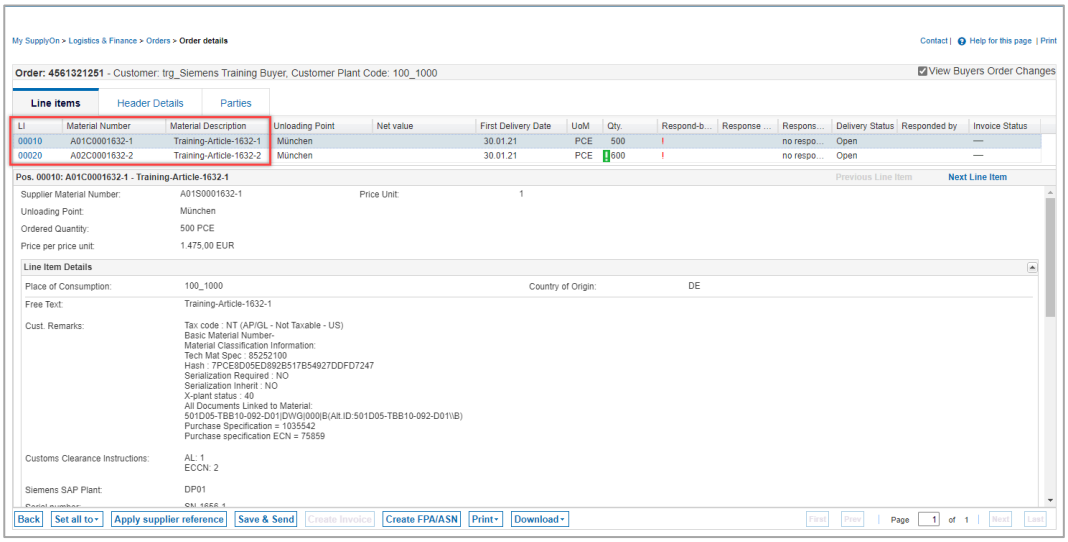


Figure: **Orders details / Order with 2 lines**

Order updates are marked with a green !

3. To view the details of a change, click the green **!**

This example shows that the customer has increased the quantity from 500 to 600 pieces.

4. To close the details, click the **x.**

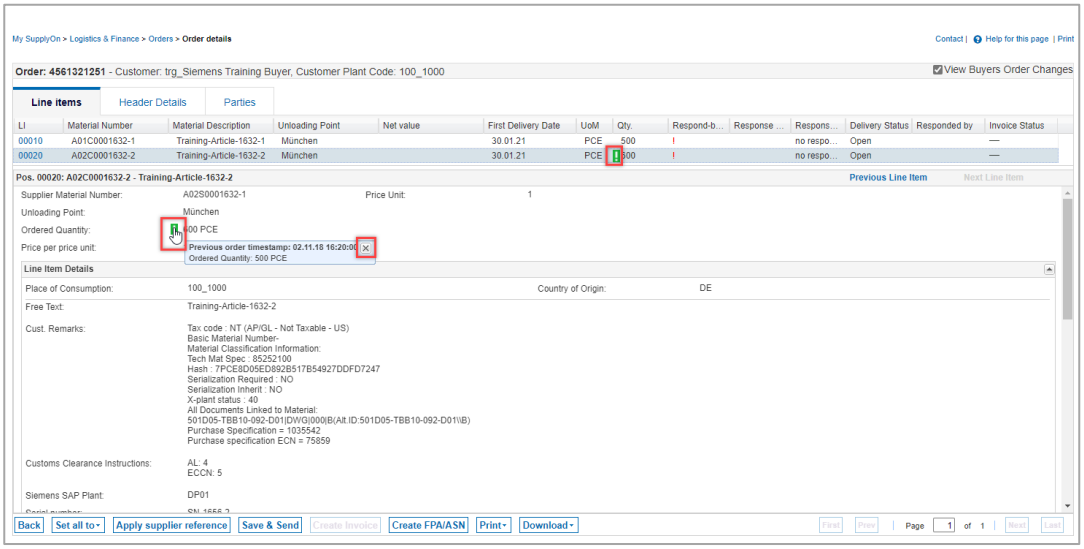


Figure: **Orders details / with change from customer related to quantity**

You can either print or download (as CSV or XSLX) each order separately with a click on the buttons at the bottom.

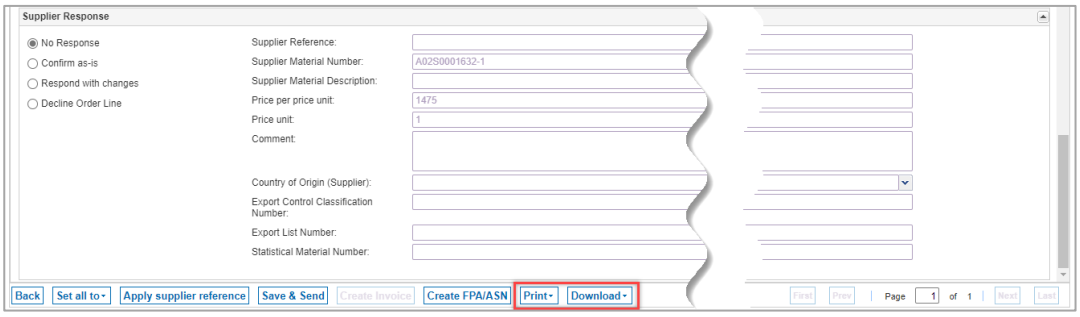


Figure: **Orders details / with action buttons at the bottom of the screen**

Or by going back (button “Back” at the bottom of the screen) you select multiple orders in one go to print or download them.

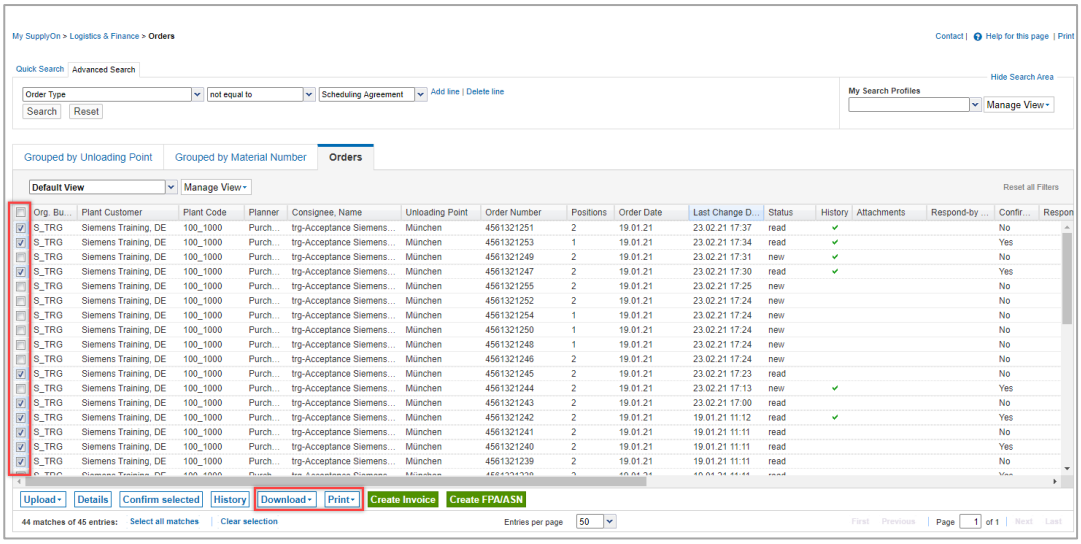


Figure: **Orders / Order Overview screen with action buttons at the bottom of the screen**

3.2 What can I see in the Confirmable Orders tile?

Within the Confirmable Orders tile you see your worklist.

- ✓ Dated – these orders have been confirmed as-is or with changes by you already and the customer has sent an update which requires your re-confirmation
- ✓ Partly Confirmed – At least one line item has already been confirmed by you, whereas one or more line items in the same purchase order are awaiting your confirmation
- ✓ Open – the order has been not yet confirmed
- ✓ → - a click here opens the overview of all orders

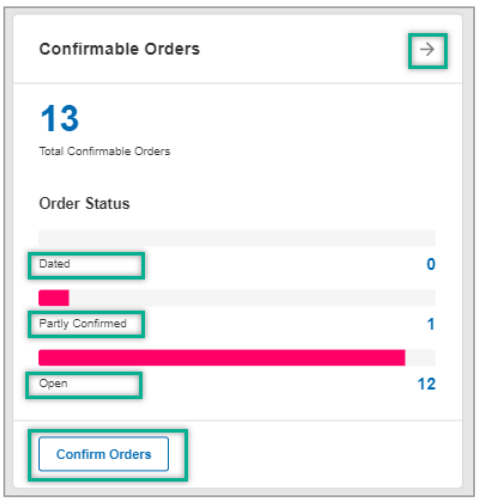


Figure: **Dashboard / tile / Confirmable Orders**

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 **New Orders**
3. **Click** into one line

The Order details screen is opened. To check all information the customer gave you, select each order line separately and scroll down to see further details. In this example order line 00010 is selected.

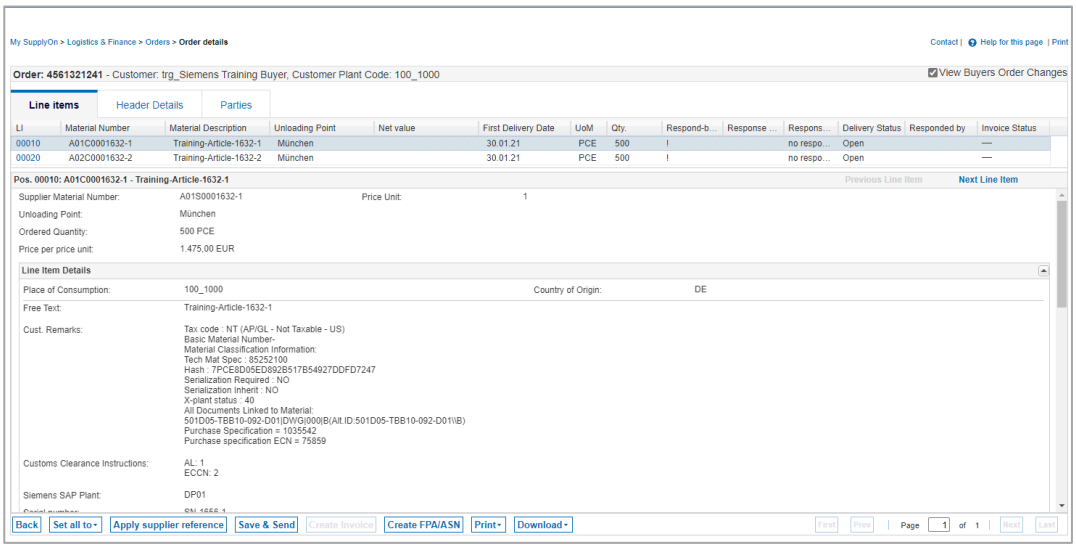


Figure: **Orders details / Line Items tab with 2 order lines**

4. Scroll down to the area **Schedule Lines**

On the left side in the **Buyer Information** section you can see that the customer wants the material delivered in two batches.

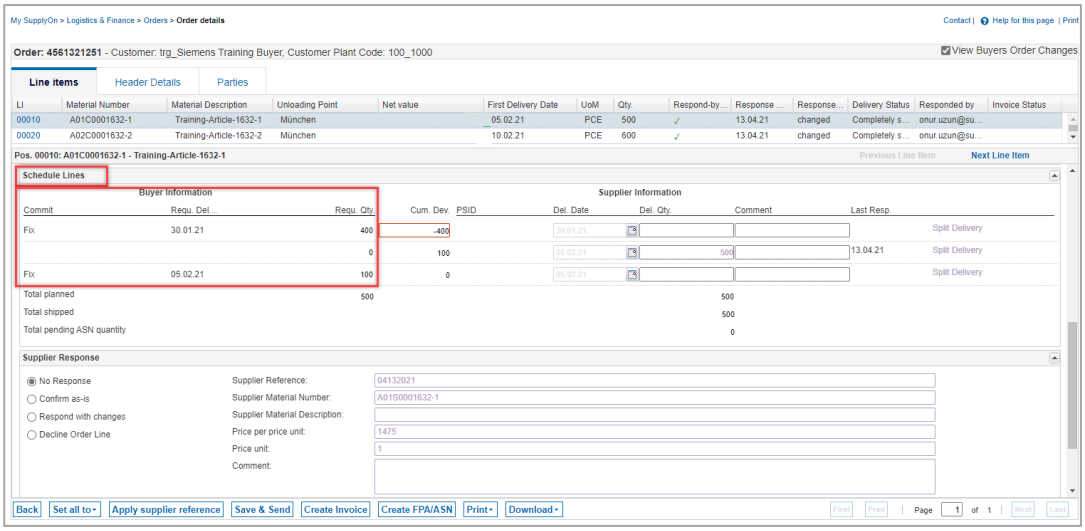


Figure: **Orders details / Line Items tab / Buyer Information for first order line**

After checking the line details, you can confirm the order – the following options are available:

4.2 Confirm as ordered ("Confirm as-is")

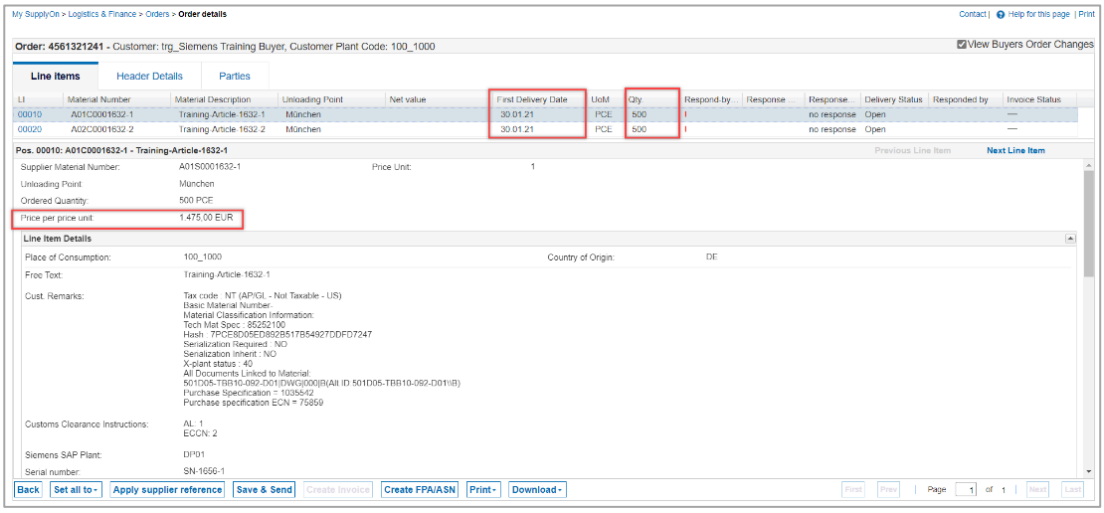


Figure: **Orders details / Line Items tab**

1. Check the requested **delivery date**, corresponding **quantity** as well as the **price per unit.**
2. Select the entry **Confirm as-is**
3. Fill-in required mandatory fields which are marked in yellow, e. g. enter your internal **reference** number for this order
4. Click **Save & Send**

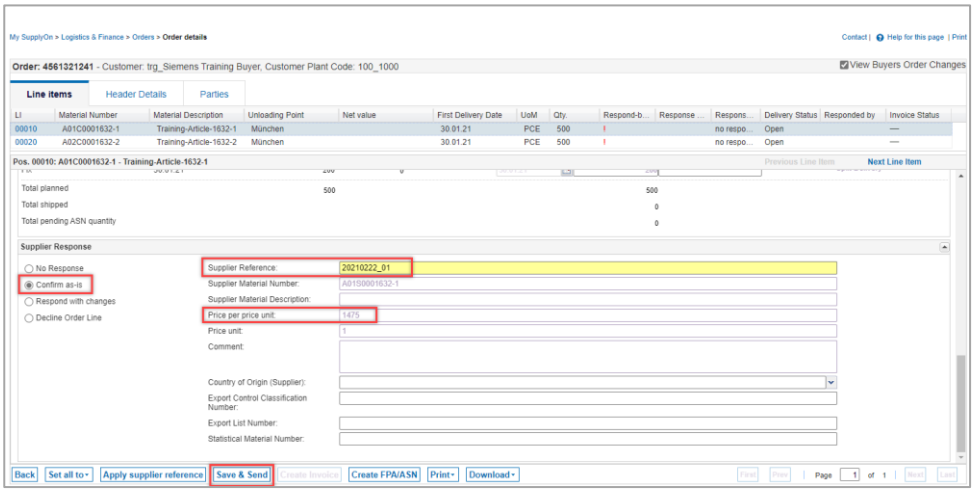


Figure: **Orders details / Line Items tab / Supplier Response area / Confirm as-is**

4.3 Confirm deviating ("Respond with changes")

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

1. Check the requested **delivery date**, corresponding **quantity** as well as the **price per unit.**

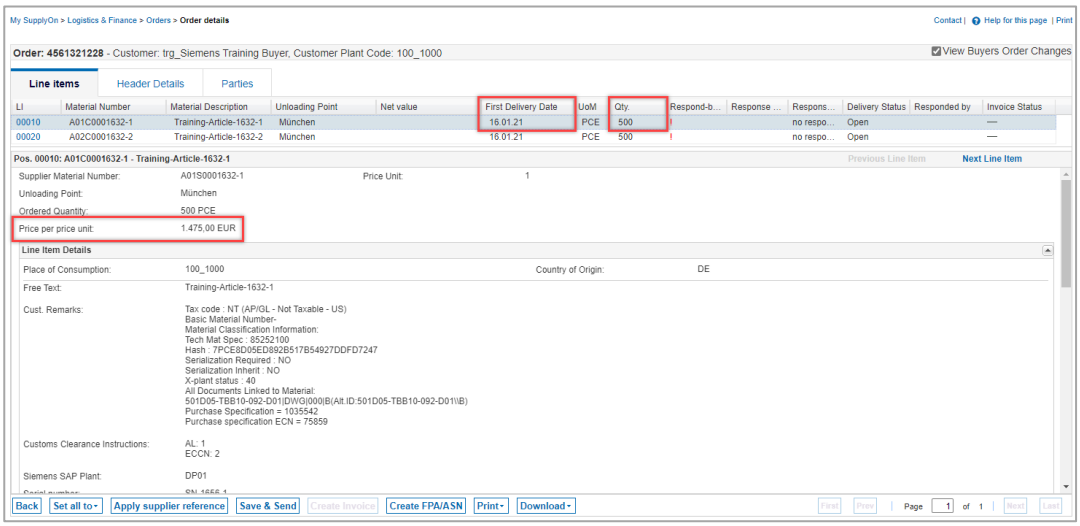


Figure: **Orders details / Line Items tab**

2. Select the entry **Respond with changes**
3. Change, for example, the **delivery quantity**
4. Click **Split Delivery**
5. Enter a new **delivery date** and the remaining **quantity**
6. Fill in required mandatory fields which are marked in yellow, e.g. enter your internal **reference** number for this order
7. Click **Save & Send**

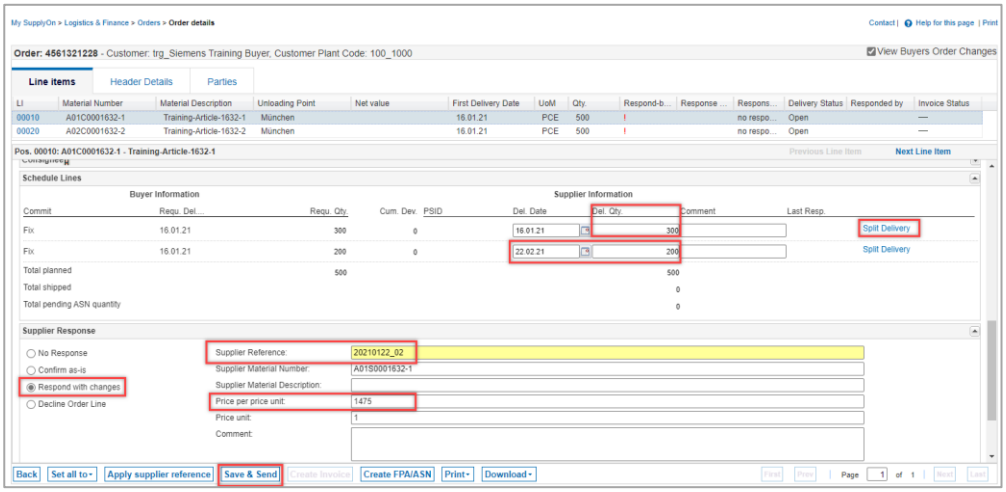


Figure: **Orders details / Line Items tab / Supplier Response area / Respond with changes**

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. The number of ‘Dated’ orders indicates these changes.

8. Open the **Dashboard**
9. Click on **Dated**

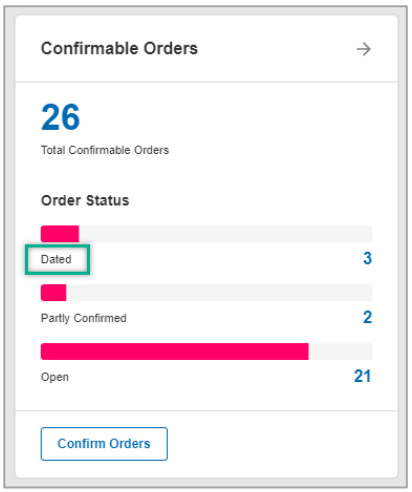


Figure: **Dashboard / tile / Confirmable Orders / Dated**

You get to the orders overview screen with your dated orders (in the example below 3 dated orders are displayed).
Please note: the check mark in the **History** column will always help you to easily see which orders have been changed by your customer.

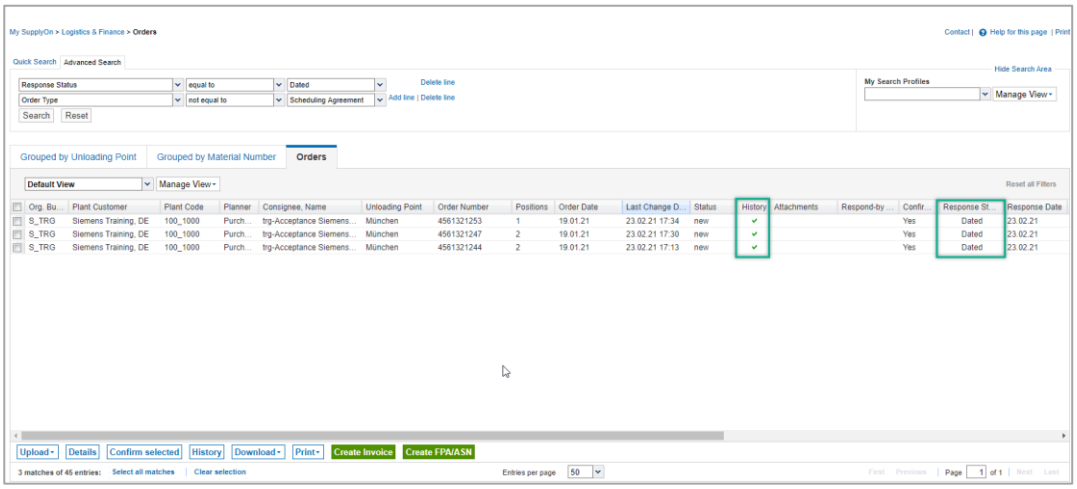


Figure: **Orders / Dated Orders**

10. Click in one **line**
11. Check the entries marked with **a green !**
12. Select the entry **Confirm as-is**
13. Enter your internal **reference** number for this order
14. Click **Save & Send**

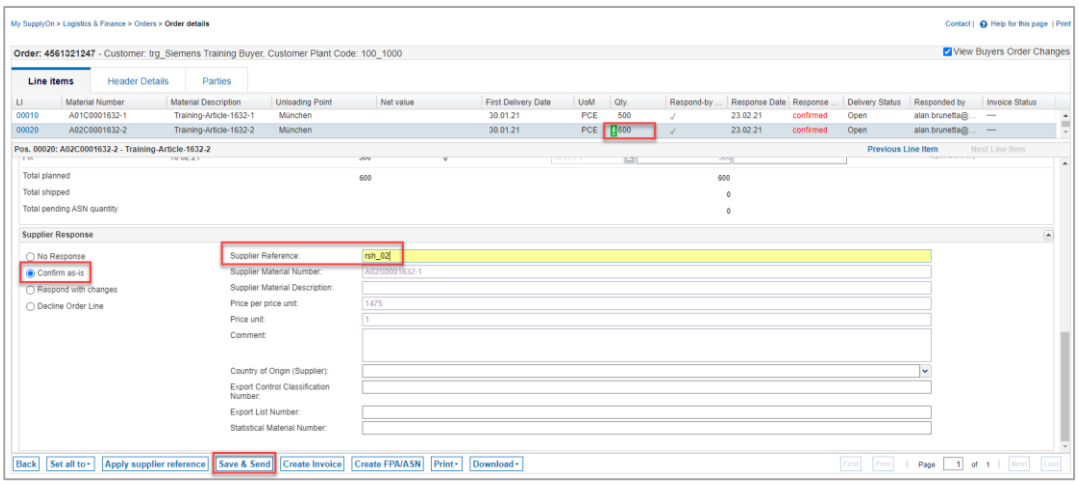


Figure: **Order details / Changed Order**

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.

5.1 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. Click on **New Orders** in the tile **Orders**
3. Select all the orders you want to confirm by ticking the box on the left; you can also confirm all open orders at once via **Select all matches**
4. Click **Download, Confirmation Template** and **XLSX**

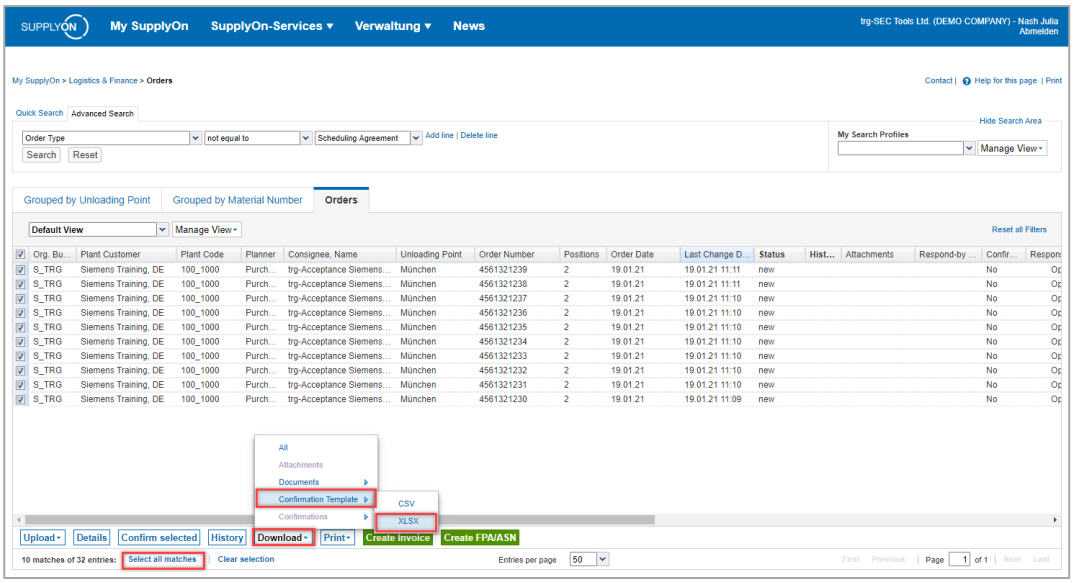
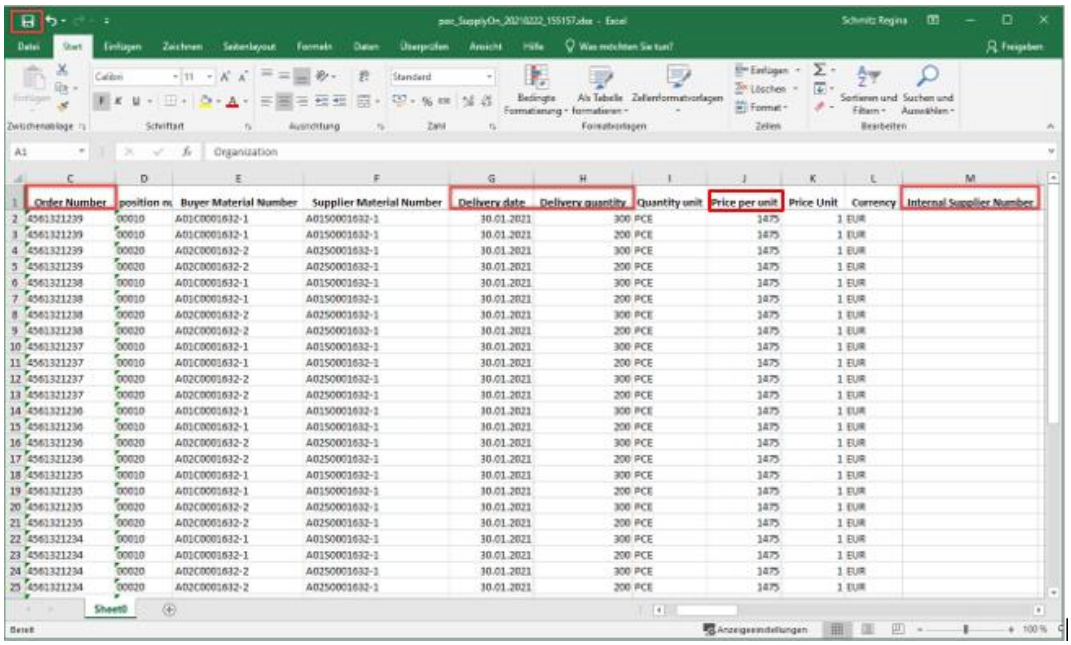


Figure: **Orders / Download / Confirmation Template / XLSX**

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



Order Number	position nr.	Buyer Material Number	Supplier Material Number	Delivery date	Delivery quantity	Quantity unit	Price per unit	Price Unit	Currency	Internal Supplier Number
4561321239	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321239	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321239	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321239	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321238	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321238	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321238	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321238	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321237	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321237	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321237	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321237	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321236	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321236	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321236	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321236	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321235	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321235	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321235	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321235	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321234	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321234	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321234	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321234	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	

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

10. Go back into the **Application**
11. Click **Upload** and select **Order Confirmation (xlsx)**

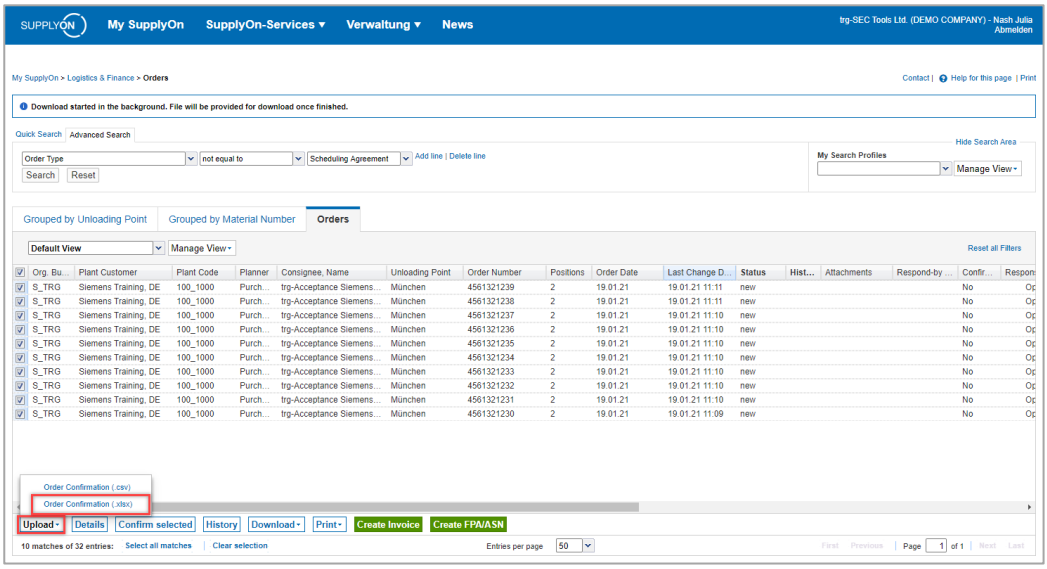


Figure: **Orders / Upload / Order Confirmation (xlsx)**

12. Click **Choose File**

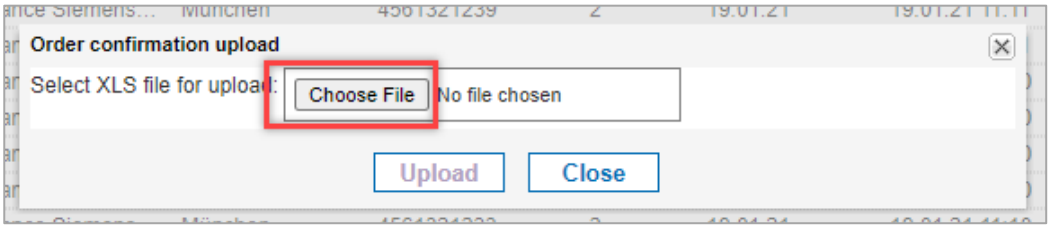


Figure: **Orders confirmation upload / Choose file from Desktop**

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

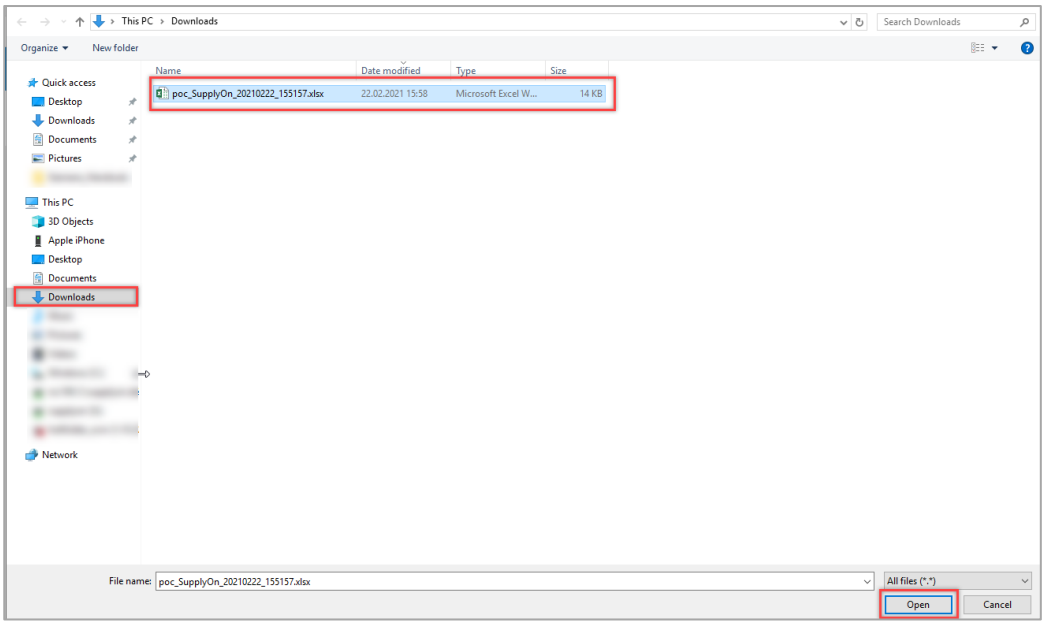


Figure: **Select template**

14. **Upload** the confirmation template

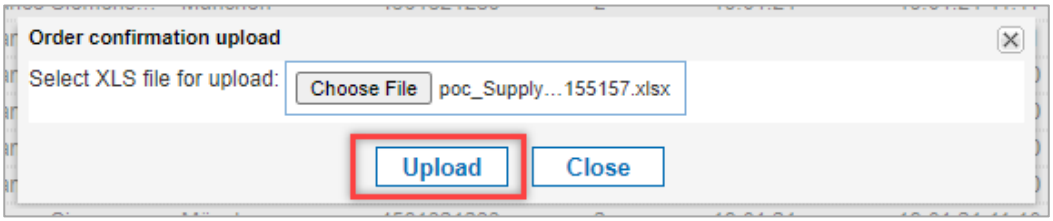


Figure: **Upload template**

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 to use this in the Orders screen.

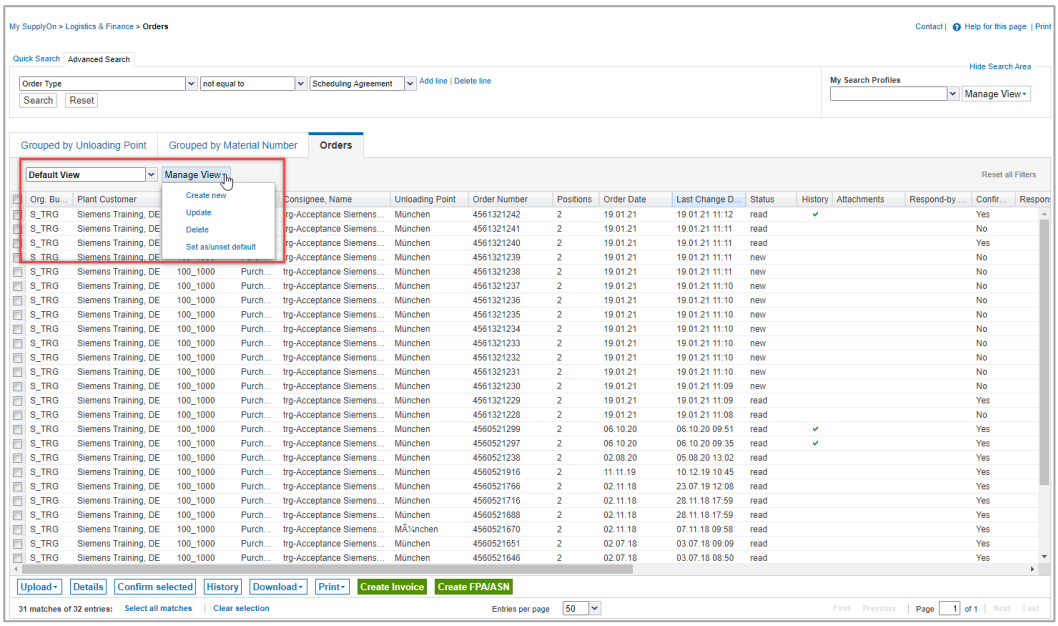


Figure: **Orders screen / Default View and Manage View**

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**

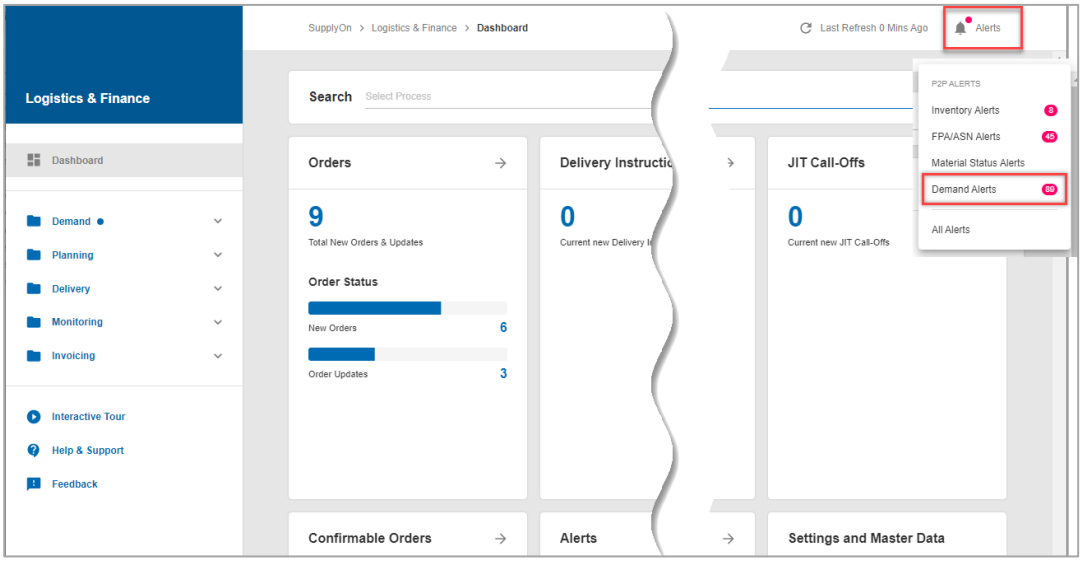


Figure: **Dashboard / Alerts**

Define a search profile you are interested in. In this example, find out where the confirmation status 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.**

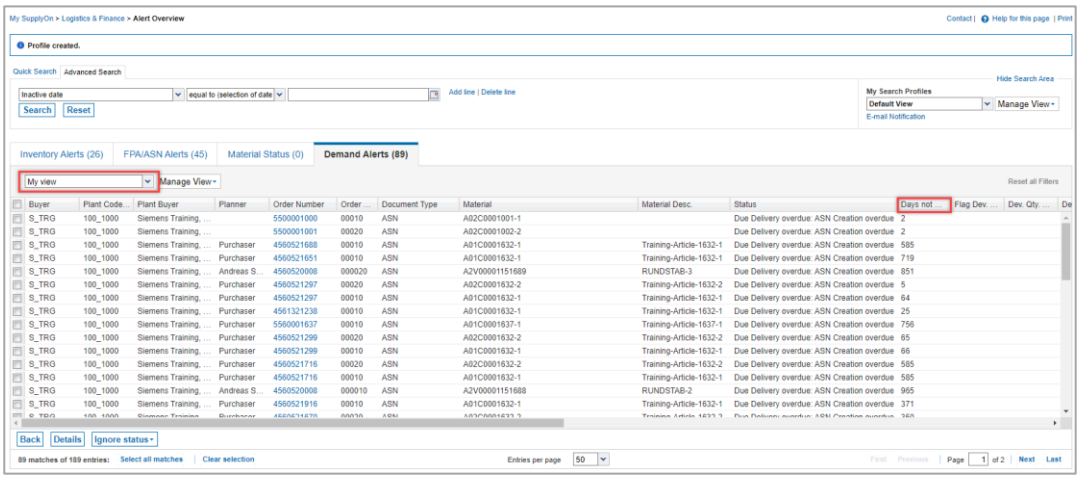


Figure: **Alert Overview / with personalized view**

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**

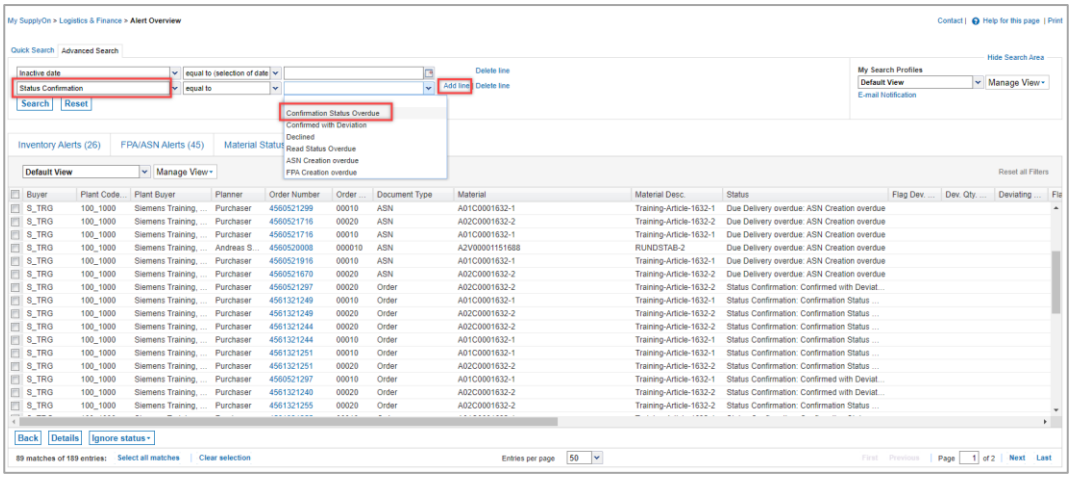


Figure: **Alert Overview / with search criteria**

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

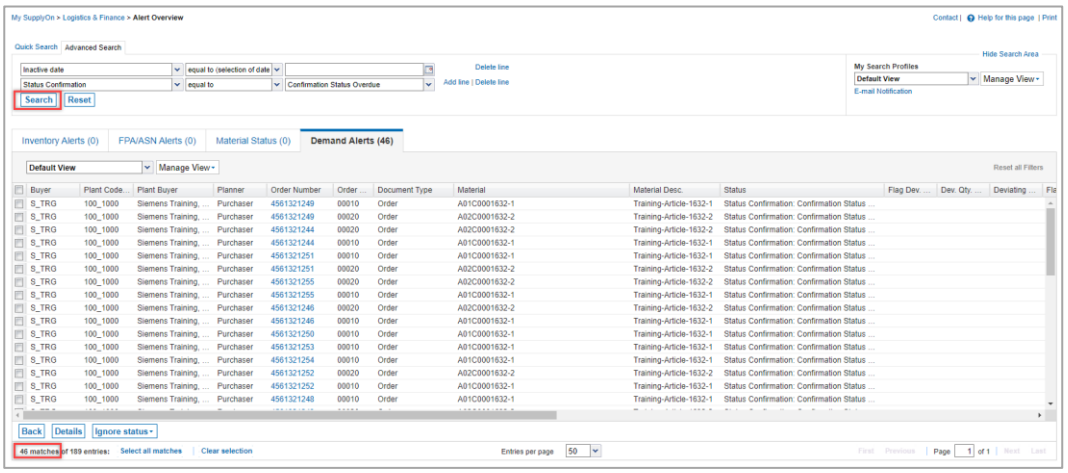


Figure: **Alert Overview / Search result is displayed**

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**

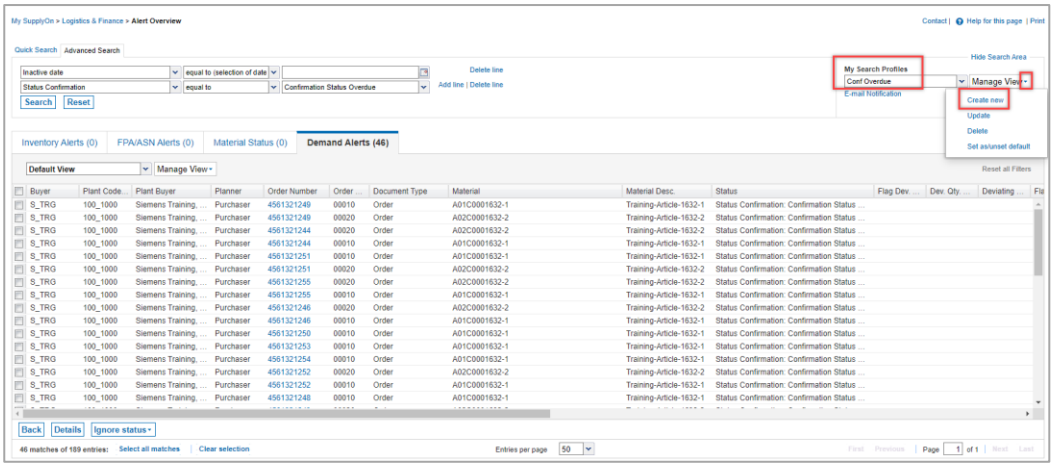


Figure: **Alert Overview / Define and save Search Profile**

11. Click **E-mail Notification**

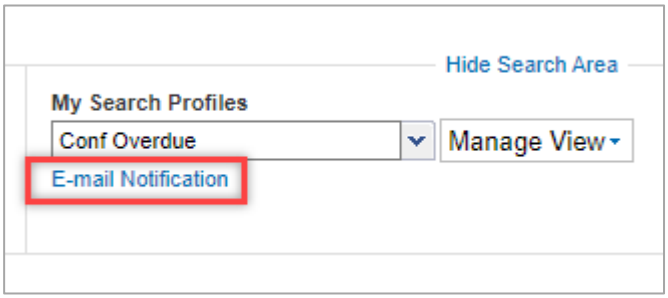


Figure: **Alert Overview / Define E-mail Notification for Search Profile**

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**

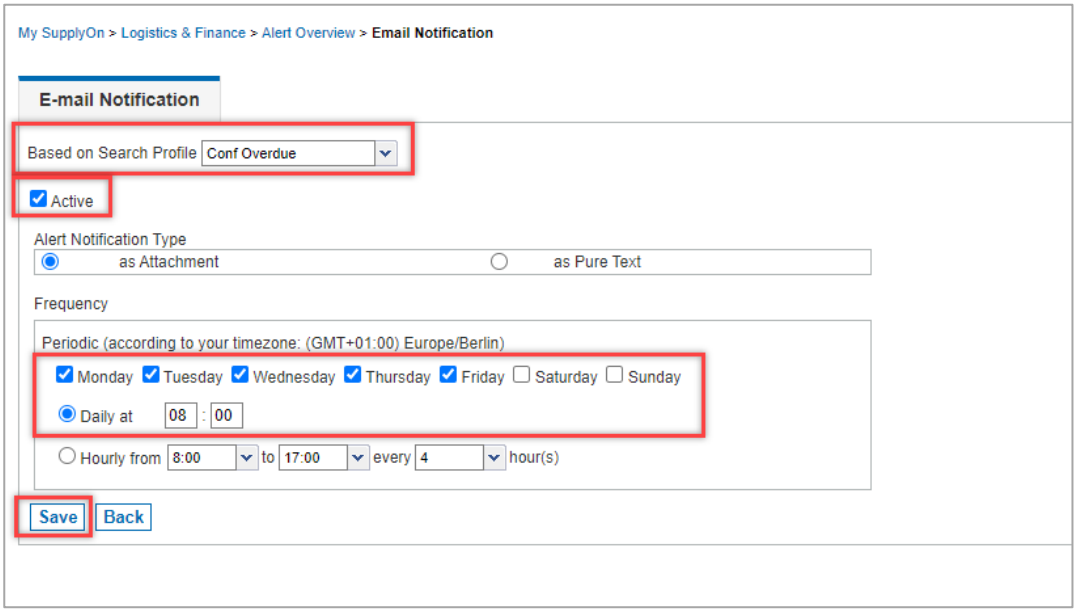


Figure: **Alert Overview / E-mail Notification**

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.**

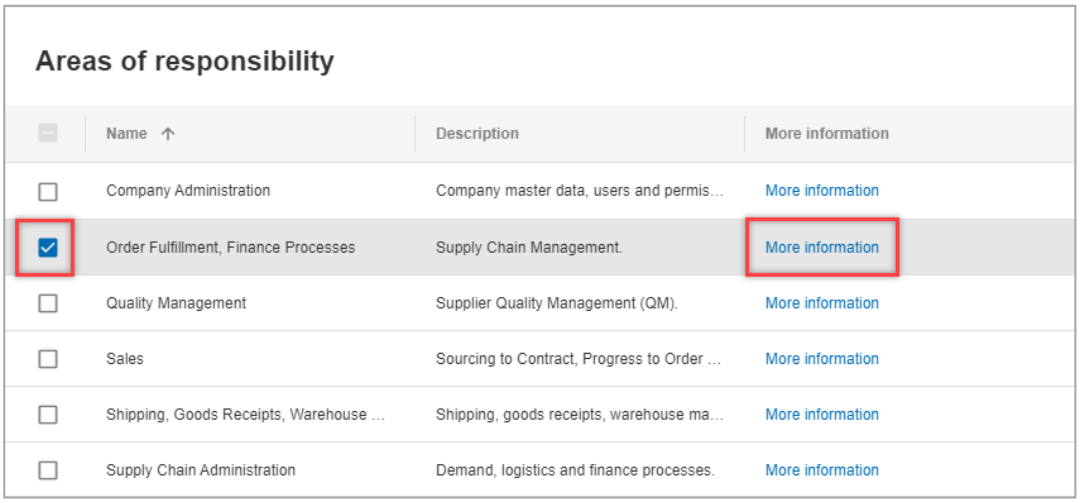


Figure: **User Management** with **Edit User** and **Areas of responsibility**

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

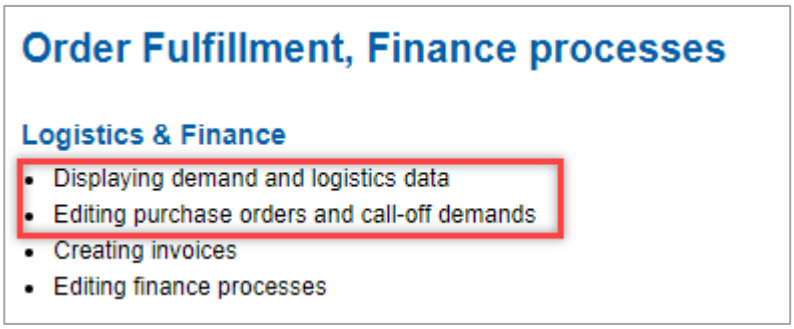


Figure: **Help page** with explanation **for Order Fulfillment, Finance processes** responsibility