

Supply Order Management: Standard Supplier Training

Reminders

This is a standard training session and open to the public. We are looking forward to have everyone to connect with you!

We recommend having these instructions handy before we start the session.

- 🔔 **Mute:** All participants are on listen-only mode to guarantee client confidentiality.
- 🔔 **Chat:** Please use the chat feature on the lower righthand side of your screen if like to raise questions anytime during the session.
- 🔔 **Questions:** All questions will be discussed at the end of the presentation.

Support Contact Information

If you have questions about the training or in need for specific client support, please contact Proactis International Customer Support:

- 📞 US: +1 866 446 8203 (Toll Free)
- 📞 US: +1 281 404 2095
- 📞 France: +33 1 77 62 56 20
- 📞 Deutschland: +49 308 967 794 11
- 📞 España: +34 911 88 00 64
- 📞 UK: +44 203 355 50 21

Or, email suppliersupport@proactisservicedesk.com

Open Supplier Network Perfect Procure

Topics

- 🌀 Login & Dashboard
- 🌀 Login page
 - Dashboard
 - User Preferences
- 🌀 Viewing an Order
- 🌀 Accepting an Order
- 🌀 Accepting an Order with Changes/Change item details
- 🌀 FlexInvoice: Creating an Invoice

Login page

1. Go to
<https://secure.perfect.com>

The screenshot shows a web browser window with the URL `ect.com%2Fmembers%2Flandingpage.act%3Fnull`. The page header includes the Perfect Commerce logo and a "CONTACT US" button. The main content area features a "Please Log In." form with the following elements:

- User ID:** A text input field with the placeholder "User ID:".
- Password:** A text input field with the placeholder "Password:".
- [Forgot Password?](#) (blue link)
- LOG IN** (orange button)

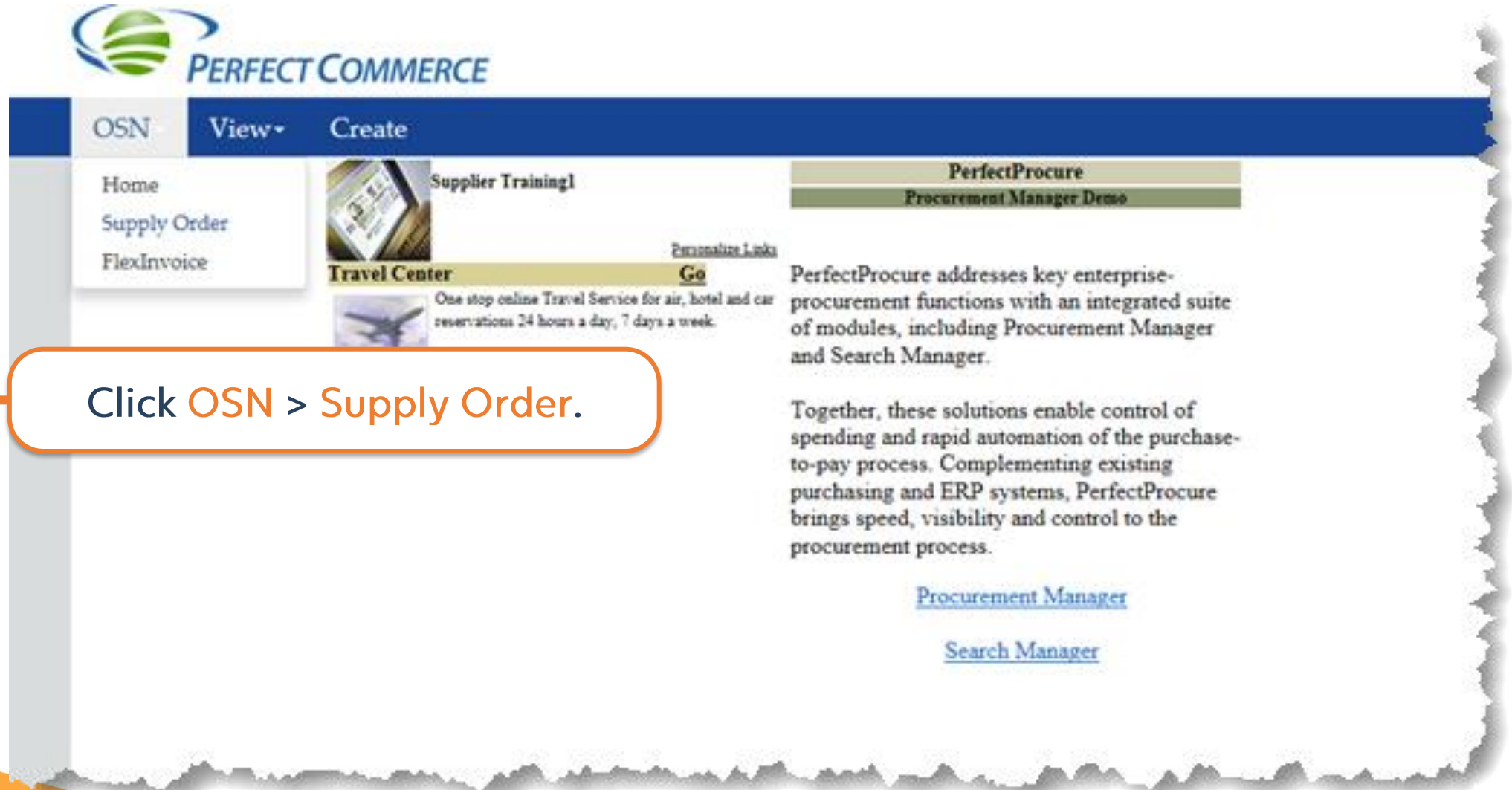
At the bottom of the form area, there are two app store download buttons: "Download on the App Store" and "ANDROID APP ON Google play".

2. Type your **User ID** and **Password**.

3. Click **Login**.

OSN Menu

(Online Supplier Network)



The screenshot displays the Perfect Commerce website interface. At the top left is the logo for Perfect Commerce, featuring a green globe icon and the text "PERFECT COMMERCE". Below the logo is a navigation bar with "OSN" selected, and "View" and "Create" options. A dropdown menu is open under "OSN", listing "Home", "Supply Order", and "FlexInvoice". An orange arrow points from a callout box to the "Supply Order" option. To the right of the dropdown are several promotional tiles: "Supplier Training" with a laptop icon, "Travel Center" with an airplane icon and the text "One stop online Travel Service for air, hotel and car reservations 24 hours a day, 7 days a week.", and "PerfectProcure Procurement Manager Demo" with a green header. Below these tiles are links for "Personalize Links" and "Go". On the right side of the page, there is a text block describing PerfectProcure as an enterprise-procurement solution, followed by links for "Procurement Manager" and "Search Manager".

PERFECT COMMERCE

OSN View Create

Home
Supply Order
FlexInvoice

Supplier Training

Travel Center
One stop online Travel Service for air, hotel and car reservations 24 hours a day, 7 days a week.

PerfectProcure
Procurement Manager Demo

Personalize Links
Go

PerfectProcure addresses key enterprise-procurement functions with an integrated suite of modules, including Procurement Manager and Search Manager.

Together, these solutions enable control of spending and rapid automation of the purchase-to-pay process. Complementing existing purchasing and ERP systems, PerfectProcure brings speed, visibility and control to the procurement process.

[Procurement Manager](#)

[Search Manager](#)

Click OSN > Supply Order.

Dashboard



ACME Industrial

Supplier Training1 ▾

OSN ▾ View ▾ Create

Dashboard Order ASN

Create

New

- Invoice
- Advance Ship Notice

From Document

- Invoice
- Advance Ship Notice

View

- Orders
- Change Orders
- Invoice
- Advance Ship Notice

Settings

- Preferences

Welcome suppliertraining1!

Select Document Type:

Search

Order Number:

Start Date:

 ▾ ▾ ▾

End Date:

 ▾ ▾ ▾

Status:

 ▾

Account Code:

 ▾

Search

Reset

Statistics

1581 New Orders
28 Change Orders
125 Accepted with Changes Orders

0 Processing Orders
6 Completed Orders
32 Cancelled Orders

834 Accepted Orders
8 Not Accepted Orders
1 Other Orders

Click **Preferences** to customize your profile



Use the quick links to open Orders according to status.

Preferences

OSN View Create

Dashboard Order ASN

Preferences

Reset Submit

General Preferences

Maximum Items Displayed
Select maximum number of list items displayed per screen (search results).

Decimal Settings
Select the number of decimal places to display for Quantity and Price fields.

Minimum Quantity Decimals
Maximum Quantity Decimals
Minimum Price Decimals
Maximum Price Decimals

Order Management Preferences

Email Address
Enter the supplier email address(es) where you want email notices sent. Required for Auto Notification and Receive Change Order (ON + Automatic Email Notice). For more than one address, separate with comma (,) or semicolon (;).

Email Notification Regional Settings
Country

30 lines
3
3
2
4
julie.criswell@perfect.c
United States

To customize items in OSN.

30 lines
3
3
2
4

Enter a valid email address for which notifications will be sent.

julie.criswell@perfect.c



Preferences

Notification and Receive Change Order (ON + Automatic Email Notice). For more than one address, separate with comma (,) or semicolon (;).

Email Notification Regional Settings

Country

Language

Time Zone

Please select a Country, Language, and Time Zone to be used for email notices only.

Auto Notification

Select ON if you want automatic email notices about incoming orders. Select a Notification Interval (the time between email notices). For fewer orders listed per email, select a shorter interval or Immediate.

Order Notification Interval

Select a Notification Interval (the time between email notices). For fewer orders listed per email, select a shorter interval or Immediate.

Auto Validation

Select Auto Validation ON for automatic comparison of the incoming order's price/quantity with supplier price/availability. Select Auto Process ON to automatically accept or reject orders based on Auto Validation (whether order's price/quantity matches supplier price/availability). Auto Validation must be on for Auto Process to work.

Auto Process

Select Auto Process ON to automatically accept or reject orders based on Auto Validation (whether order's price/quantity matches supplier price/availability). Auto Validation must be on for Auto Process to work.

Receive Change Order

Select ON to receive incoming change orders for processing. Select ON + Automatic Email Notice to receive incoming change orders and also email notices.

Change Order Notification Interval

Select a Notification Interval (the time between emails). For fewer change orders listed per email, select a shorter interval or Immediate. Select OFF to automatically reject all change orders.

Auto Cancel Order

Receive Change Order must also be ON. Select ON to automatically accept a buyer's cancel order if the order shipment status is set to Not Applicable or Not Yet Shipped. Select OFF to process incoming change orders manually.

julie.criswell@perfect.c

United States

English

(GMT+01:00) Amsterdam, Copenhagen, Madrid, Paris, Vilnius

To personalize your pages

Select **ON** to receive email notifications.

Change the frequency of receiving notifications.

ON OFF

Immediate

ON OFF

ON OFF

ON ON + Automatic Email Notice OFF

Immediate

ON OFF

Do not change these items

3. Click **Dashboard** to go back to the Supply Order page.

1. Click **Submit** to save the changes you made.

2. A confirmation message will appear saying that changes you made are saved.

General Preferences

Maximum Items Displayed

Select maximum number of list items displayed per screen (search results).

20 lines

Decimal Settings

Select the number of decimal places to display for Quantity and Price fields.

Minimum Quantity Decimals

3

Maximum Quantity Decimals

3

Minimum Price Decimals

2

Maximum Price Decimals

4

Update Successful

Your Preferences have been modified. Please confirm that your submission is correct. If you need to make changes, please [click here](#) to return to the form.

General Preferences

Maximum Items Displayed

20

Minimum Quantity Decimals

3

Maximum Quantity Decimals

3

Minimum Price Decimals

2

Maximum Price Decimals

4

Order Management Preferences

Email Address

julie.criswell@perfect.com; bsgirlscouts@gmail.com, dionne.blakeney@perfect.com

Country

United States

Language

English

Time Zone

(GMT+01:00) Amsterdam, Copenhagen, Madrid, Paris, Vilnius

Auto Notification

ON

Order Notification Interval

Immediate

Auto Validation

OFF

Auto Process

OFF

Viewing an Order: New Orders



ACME Industrial

Supplier Training1 ▾

OSN ▾ View ▾ Create

Dashboard Order ASN

Create

New

- Invoice
- Advance Ship Notice

From Document

- Invoice
- Advance Ship Notice

View

- Orders
- Change Orders
- Invoice
- Advance Ship Notice

Settings

- Preferences

Welcome suppliertraining1!

Select Document Type: Order ▾

Search

Order Number:

Start Date:

 ▾ ▾ ▾

End Date:

 ▾ ▾ ▾

Status:

 All ▾

Account Code:

 All ▾

Search

Reset

Statistics

1581 New Orders

28 Change Orders

125 Accepted with Changes Orders

0 Processing Orders

6 Completed Orders

32 Cancelled Orders

834 Accepted Orders

8 Not Accepted Orders

1 Other Orders

Click **New Orders** to display any new, unprocessed orders.

Viewing an Order: Action Buttons
















The hot keys on the right allow you to View, Export or Open a printable PDF copy of each order

Dashboard Order ASN

Account Code: All
Status: New Order
Start Date: [] [] []
End Date: [] [] []
Order Number: []
Exact Match

Search Reset

Displaying 1-10/1581 Page 1 /159 Go

	!	Attach	Order Number	Sender	Account Code	Status	Order Date	Total Cost	Currency	Action
<input type="checkbox"/>			169-2166-46		Demo1	New Order	May 17, 2016 10:06 AM	1.00	USD	  
<input type="checkbox"/>			169-2165-46		Demo1	New Order	May 17, 2016 10:05 AM	52.00	USD	  
<input type="checkbox"/>			11304-545-46		Demo	New Order	May 9, 2016 3:52 AM	41.50	USD	  
<input type="checkbox"/>			169-2156-46		Demo1	New Order	Apr 14, 2016 1:50 PM	1.00	USD	  
<input type="checkbox"/>			169-2155-46		Demo1	New Order	Apr 14, 2016 1:41 PM	0.10	USD	  



Viewing an Order: Header/Buyer Information

Help : Manage your documents by choosing one of the actions below

Purchase Order : 169-2166-46

BILL to / SHIP to / BUYER Info

Buyer: Party ID:1c12595a-77d3-1000-bfd5-ac16042a0001 AndrewOrg Corporate Express Canada - Axiom 550 Pendant Drive line 3 line 4 line 2 line 5 Mississauga, Ontario L5T 2W6 CA	Bill To: Party ID:N/A Corporate Express Canada - Axiom 550 Pendant Drive line 3 line 4 line 2 line 5 Mississauga, Ontario L5T 2W6 CA	Ship To: Party ID:1 Admin Test Address name 2 1234 East Main Shipping Lees Summit, Missouri 64063 US
Buyer Order Contact: Order Contact: Michaud,John-z384646 Contact ID: Telephone: 757-766-5862 Email: John.michaud@perfect.com Fax:	Billing Order Contact: Order Contact: Lienard,Nathan Contact ID: Telephone: 1-999-999-9997 Email: nathan.lienard@perfect.com Fax: 555-5555	Shipping Order Contact: Order Contact: Michaud,John-z384646 Contact ID: Telephone: 757-766-5862 Email: John.michaud@perfect.com Fax:

General Information


Order Date May 17, 2016 10:06 AM	Account Code Demo1	Buyer Ship By Date: May 17, 2016 10:06 AM	Currency: U.S. Dollar
Allow Partial Shipment: No	Requested Delivery Date: Jun 1, 2016 12:00 PM		

Supplier Ref. No. <input type="text"/>	Supplier Ship By Date: May 17, 2016	Shipment Choice Not Applicable
Status New Order <input type="button" value="v"/>	Payment Choice Not Applicable	Shipment Choice Other
Status Other	Payment Choice Other	

Note To Buyer:

Viewing an Order: Additional Information

Displaying 1-1/1 Page 1 / 1 Go

Export	Number	Part Number	Description:	Unit:	Quantity:	Unit Price	Per	Price Unit	Amount	Action
<input type="checkbox"/>	1	Seller: 1 Manufacturer:	1	Ounce Av	1.000	1.00 U.S. Dollar	1.000	Ounce Av	1.00	

1

Status: New Order Status Other: Supplier Price:	Payment: Not Applicable PAYMENT OTHER Max Backorder Allowed: 0.000	Shipment: Not Applicable Shipment Other: Requested Delivery Date: Jun 1, 2016 12:00 PM
--	--	--

Commodity Code:

Item Type:
Goods

Final Recipient

Name and Address: Party ID:1 Admin Test Address name 2 jmaxiom mail stop USOPP-035791 Lees Summit, Missouri 64063 US	Order Contact: Order Contact: Michaud,John-z384646 Contact ID: Telephone: 757-766-5862 Email: John.michaud@perfect.com Fax:	Shipping Contact:
---	--	-------------------

Tax

Taxable Amount:	Tax Amount: 0.00 U.S. Dollar Percentage: 0.00	Tax Category: Standard Rate
-----------------	--	--------------------------------

Location:

Click on the small arrow icon to display/hide item details.

 Click the **Expand/Hide** icon to display the line item details. Use the same icon to view available attachments.

Viewing an Order: Additional Information

Find additional information on the order by clicking on the Expand/Collapse icon for each section

Displaying 1-1/1 Page 1 / 1 Go

Export	Number	Part Number	Description:	Unit:	Quantity:	Unit Price	Per	Price Unit	Amount	Action
<input type="checkbox"/>	1	Seller: 1 Manufacturer:	1	Ounce Av	1.000	1.00 U.S. Dollar	1.000	Ounce Av	1.00	

Export checked to:

Sub Total for the Order:	1.00 U.S. Dollar
Tax Total for the Order:	0.00 U.S. Dollar
Total Amount for the Order:	1.00 U.S. Dollar

Displaying 1-1/1 Page 1 / 1 Go

- ▶ Tax Information
- ▶ Attachments
- ▶ Payment Information
- ▶ Terms of Delivery
- ▶ Transport Information

Notes

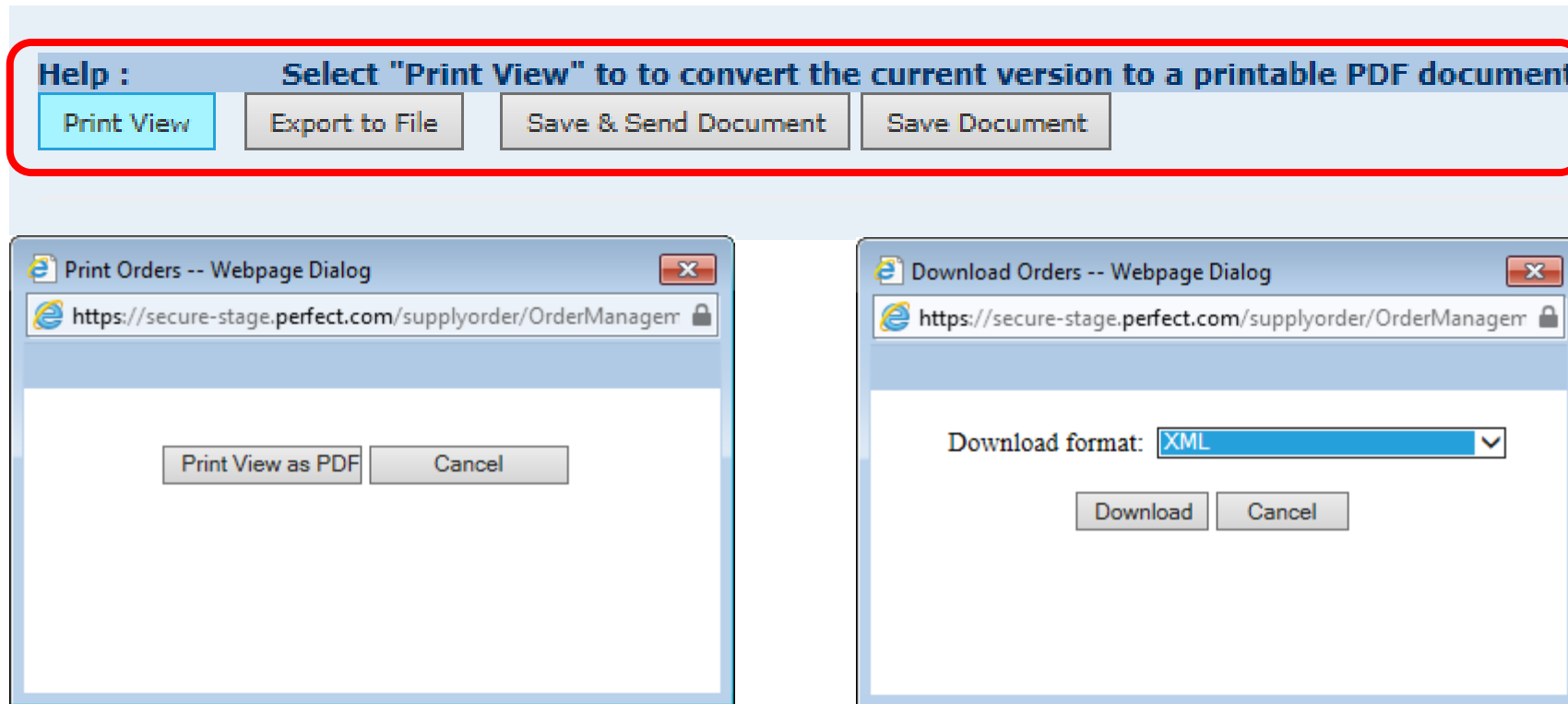
General Notes:

▶ Additional Notes

Click the small arrow icon to display/hide item details.

Viewing an Order: Action Buttons

You can manage documents by choosing one of the action buttons just hover your mouse over each icon for more information on its function



Accepting an Order

Help : Manage your documents by choosing one of the actions below
Print View Export to File Save & Send Document Save Document

Purchase Order : 169-2166-46

BILL to / SHIP to / BUYER Info

Buyer:
Party ID:1c12595a-77d3-1000-bfd5-ac16042a0001
AndrewOrg
Corporate Express Canada - Axiom
550 Pendant Drive
line 3
line 4
line 2
line 5
Mississauga, Ontario L5T 2W6
CA

Buyer Order Contact:
Order Contact: Michaud,John-z384646
Contact ID:
Telephone: 757-766-5862
Email: John.michaud@perfect.com
Fax:

Ship To:
Party ID:1
Admin Test Address
name 2
1234 East Main
Shipping
Lees Summit, Missouri 64063
US

Shipping Order Contact:
Order Contact: Michaud,John-z384646
Contact ID:
Telephone: 757-766-5862
Email: John.michaud@perfect.com
Fax:

General Information

Order Date
May 17, 2016 10:46 AM
Allow Partial Shipment:
No

Requested Delivery Date:
Jun 1, 2016 12:00 PM

Currency:
U.S. Dollar

Supplier Ref. No.
169216646

Supplier Ship By Date:
May 17, 2016

Status
Accepted

Payment Choice
Not Applicable

Status Other
Accepted
Accepted With Changes
Cancelled
New Order

Note To Buyer:
Test for training only

3. Click on Save and Send Document tab to send your response.

1. Maintain a Supplier reference number for this order. This number is for internal purpose only and won't be visible to the customer.

2. Use the dropdown arrow on the Status field to choose the desired status.
The buyer will be informed of the new status once you save & send the purchase order response

Accepting an Order with changes

Changing the status to "accepted with changes" will refresh to display editable components of the purchase order.

The screenshot shows a purchase order management interface. The top section is titled "General Information" and contains fields for Order Date (Sep 12, 2016 3:52 PM), Account (Demo), Ship By Date (2, 2016 3:52 PM), Currency (U.S. Dollar), Allow Partial Shipment (No), and Requested Delivery Date (Dec 15, 2016 1:00 PM). Below this, there are fields for Supplier Ref. No. (1234), Status (Accepted With Changes), Supplier Ship By Date (September 12, 2016), Payment Choice (Not Applicable), and Shipment Choice (Not Applicable). A "Note To Buyer" field is also present. The bottom section is a table with columns: Export, Number, Part Number, Description, Unit, Quantity, Unit Price, Per, Price Unit, Amount, and Action. The table contains one row for "Test Item 3" with a quantity of 1,000 and a price of 2.01. The "Action" column for this row contains an edit icon. Below the table, there are summary rows for "Total for the Order" showing amounts in U.S. Dollars.

1. Change Status to Accepted with changes

2. Further editable fields become available once the status is changed.

3. This Field allows you to leave a note for the buyer, which he will receive together with the Purchase Order Response

4. This button allows you to edit details on the line item level

Accepting an Order with changes

Line item Level changes

Save Back To PO

2. Click "Save" to confirm your changes and 'Back to PO" to return to the main document screen

Line Item	Part Number	Price:	Per	Price Unit	Total:
1	Seller: part num Manufacturer:	2.01 U.S. Dollar	1.000	Envelope	2.01

Status: Accepted With Changes ▼
Status Other:
Supplier Price:
Price Unit:
Quantity Unit:

Payment: Not Applicable ▼
PAYMENT OTHER:
Per:
Price Unit Other:
Quantity Unit Other:

1. Further fields that can be edited when the status is set to "accepted with changes"

[Add Shipment Detail]
Available Quantity: 1.000
Ship By Date: December ▼ 15 ▼ 2016 ▼
Requested Delivery Date:
Shipment: Not Applicable ▼
Shipment Other:
Notes:

Accepting an Order with changes



ACME Industrial

Supplier Training1 ▾

OSN ▾ View ▾ Create

Dashboard Order ASN

Your order has been updated and an Order Response sent to the customer.

Help : Manage your documents by choosing one of the actions below

Print View Export to File Save & Send Document Save Document

Purchase Order : 7-182-46

BILL to / SHIP to / BUYER Info

Buyer:

Party ID:N/A
24176-24179
Axiom Inc.
555 Axiom Dr.
Lees Summit, MO 64063
US
Buyer Order Contact:
Order Contact: Babbit,Kelly-z98531
Contact ID:
Telephone: 8164484000
Email: kelly.babbit@escout.com
Fax: 8164484000

Bill To:

Party ID:N/A
Axiom Inc.
555 Axiom Dr.
Lees Summit
US
Billing Order Contact:
Order Contact: No Contact specified
Contact ID:
Telephone:
Email:
Fax:

64063

Click "Save & Send Document" to send your response to the customer.

FlexInvoice

FlexInvoice Home Page:

- After you have successfully Save and Send the PO to your client, you are now ready to electronically convert the fulfilled PO into an invoice via FlexInvoice.
- FlexInvoice is accessed the same way Supply Order.
- Choose FlexInvoice from the OSN Tab on the blue bar (Open Supplier Network) drop-down after logging in:

PERFECT COMMERCE

ACME Industrial Supplier Training1

OSN View Create

Home
Supply Order
FlexInvoice

Supplier Training1

Travel Center

PerfectProcure
Procurement Manager Demo

Personalize Links
Go

One stop online Travel Service for air, hotel and car reservations 24 hours a day, 7 days a week.

PerfectProcure addresses key enterprise-procurement functions with an integrated suite of modules, including Procurement Manager and Search Manager.

Together, these solutions enable control of

Choose FlexInvoice from the OSN Tab on the blue bar (Open Supplier Network) drop-down after logging in.

Procurement Manager
Search Manager

POWERED BY PERFECT COMMERCE

Privacy Policy Antitrust Policy About Perfect Commerce

FlexInvoice Home Page

The screenshot displays the FlexInvoice Home Page interface. At the top left is the Perfect Commerce logo. The top right shows the user 'ACME Industrial' and 'Supplier Training1'. A blue navigation bar contains 'OSN', 'View', and 'Create'. Below this, the page title is 'FlexInvoice Create New Invoice'. The main area features a search filter grid with the following fields:

PO Number	PO Status	Type of Document	Date Range		Document Type
<input type="text"/>	All	All	<input type="text"/>	<input type="text"/>	PO
			Begin (yyyy-mm-dd)	End (yyyy-mm-dd)	
Invoice Number	Invoice Status	Workflow Status	Amount Range		Buyer Company Id
<input type="text"/>	All	All	<input type="text"/>	<input type="text"/>	<input type="text"/> Id Search
			Minimum	Maximum	

At the bottom of the filter grid are 'Search' and 'Clear' buttons. A red-bordered box highlights a message: 'You have DISPUTED invoices.' A callout box labeled 'Message Center' points to this message. The footer contains 'POWERED BY PERFECT COMMERCE' and links for 'Privacy Policy', 'Antitrust Policy', and 'About Perfect Commerce'.

FlexInvoice Home Page and Search Filters

Select the PO you would like to convert to INVOICE.

PERFECT COMMERCE

ACME Industrial Supplier Training1

OSN View Create

FlexInvoice Create New Invoice

PO Number

PO Status
All
Invoiced
Not Invoiced
Partially Invoiced
Over Invoiced
All

Invoice Number

Type of Document

Date Range

Document Type

Workflow Status

Amount Range

Buyer Company Id Id Search

Search Clear

You have DISPUTED invoices.

POWERED BY PERFECT COMMERCE Privacy Policy Antitrust Policy About Perfect Commerce

Change the PO Status to Not Invoiced

Searching for an Invoice: Status

There are several filters to help you find the Purchase Order:

PO Number

Date Range Filter

Click Search to apply the filters

PO#	Order Date	Amount	Status	Buyer
169-2245-46	09/12/2016	2.01	Not Invoiced	Axiom Inc.
169-2244-46	09/12/2016	2.01	Not Invoiced	Axiom Inc.
11304-572-46	08/18/2016	41.50	Not Invoiced	Axiom Inc.
169-2241-46	08/13/2016	1.00	Not Invoiced	Axiom Inc.
11191-JPM-1941-46	08/09/2016	232.00	Not Invoiced	Axiom Inc.
169-2230-46	08/09/2016	1.00	Not Invoiced	Axiom Inc.
169-2229-46	08/09/2016	1.00	Not Invoiced	Axiom Inc.
169-2228-46	08/09/2016	1.00	Not Invoiced	Axiom Inc.
169-2227-46	08/09/2016	1.00	Not Invoiced	Axiom Inc.
169-2217-46	07/25/2016	40.00	Not Invoiced	Axiom Inc.

Creating an Invoice: PO Summary page

PERFECT COMMERCE

ACME Industrial Supplier Training1

OSN View Create

FlexInvoice PO Summary

Order Number: 169-2245-46
Change Status:
PO Submit Date: 09/12/2016
PO Status: Not Invoiced
Buyer Name: Axiom Inc.
Currency Code: USD
Payment Type: Mutually Defined
Core Amount: 2.01
Estimated Tax: 0.00
Total Amount: 2.01

PO Summary Details

Line Item Details

Line Items

Po Line#	Change Status	Qty	UOM	Description	Supplier Part	Unit Price	Price Unit	Total	Status	Add to Invoice?
1		1	EV	Test Item 3	part num	2.01	1	2.01	U	<input checked="" type="checkbox"/>

Convert to Invoice

*Changes marked in yellow.

POWERED BY PERFECT COMMERCE Privacy Policy Antitrust Policy About Perfect Commerce

Creating an Invoice: Status and Add to Invoice columns

Po Line#	Change Status	Qty	UOM	Description	Supplier Part	Unit Price	Price Unit	Total	Status	Add to Invoice?
1		1	EV	Test Item 3	part num	2.01	1	2.01	U	<input checked="" type="checkbox"/>

The Add to Invoice box should have a check mark.

Statuses

- U (Un-invoiced)—means the PO has not been invoiced.
- I (Invoiced)—means this the PO has already been invoiced
- P (Partially Invoiced)—this means the PO has been partially invoiced
- O (Over Invoiced)—means the PO has been over invoiced, and you may likely find the "You have Disputed Invoices" message when first logging into FlexInvoice

Add to Invoice

- The Add to Invoice option allows you to deselect line items from multi line item POs not ready to be included in the current invoice you are about to create. If you deselect Line Items while creating a Invoice, the Purchase Order will stay in status P, partially invoiced.

Creating an Invoice: Review

This screen gives the user a chance to review the line items to be included, before creating the invoice

FlexInvoice PO Summary

Order Number: 169-2245-46
Change Status:
PO Submit Date: 09/12/2016
PO Status: Not Invoiced
Buyer Name: Axiom Inc.
Currency Code: USD
Payment Type: Mutually Defined
Core Amount: 2.01
Estimated Tax: 0.00
Total Amount: 2.01

Line Items

Po Line#	Change Status	Qty	UOM	Description	Supplier Part	Unit Price	Price Unit	Total	Status	Add to Invoice?
1		1	EV	Test Item 3	part num	2.01	1	2.01	U	<input checked="" type="checkbox"/>

Click the Convert to Invoice button to proceed.

*Changes marked in yellow.

POWERED BY PERFECT COMMERCE [Privacy Policy](#) [Antitrust Policy](#) [About Perfect Commerce](#)

Creating an Invoice: Edit Invoice Details

This screen gives the user the opportunity to edit details of the invoice. It is mandatory to add the Invoice number on the Invoice Number field.

The invoice number is a mandatory field and is used as a reference number for this document

Invoice total, for products and services only, exclusive of tax, shipping and other costs. This field is not directly editable. This will be updated if quantities or prices are changed and the document is updated.

Total Amount represents the Invoice total, for products and services only, inclusive of shipping and other costs.

Header and Line item comment fields are available to add comments to your client.

Action buttons.

FlexInvoice Edit Invoice

Invoice Currency Code: USD
Alternate Currency Code:
Invoice Number:
Related Invoice Number:
PO Number: 169-2245-46
Time of Supply:
Invoice Date: 09/15/2016
Comment:

Amount Exclusive of Taxes: 2.01
Value Added Tax Total (Invoice Currency): 0.14
Value Added Tax Total (Alternate Currency):
Non-Taxable Shipping Total: 0.00
Invoice Total (Invoice Currency): 2.15
Invoice Total (Alternate Currency):
Discount Rate:
Discount Amount:

Add Lines Cancel Ship Info Update Create Invoice

Invoice Line#	PO Line#	Type of Supply	Qty	Previously Invoiced	UOM	Description	Supplier Part	Unit Price	Amount Exclusive of Tax
1	1	Sale	1	0	EV	Test Item 3	part num	2.0100	2.01

Discount Rate	Discount Amount	Tax Type	Tax Rate	Exempt	VAT Tax Amount (Invoice Currency)	Total Amount (Invoice Currency)	VAT Tax Amount (Alternate Currency)
		ValueAddedTax	7%	No	0.14	2.15	

* Calculated on discounted amount

Add Lines Cancel Ship Info Update Create Invoice

Creating an Invoice: Action Buttons



- **Add Lines:** allows you to add additional lines to the invoice
- **Cancel:** allows you to cancel out of the creation process
- **Ship Info:** opens a page that allows you to enter shipping information to the invoice. Be sure to click the Add/Accept button once you enter the information to confirm it saves to the invoice
- **Update:** if you have edited pricing or quantity, you will need to click the Update button to ensure the information added/edited is saved to the Invoice.
- **Create Invoice:** once you have provided all the needed information, you will click this button to be taken to the read only summary page. This allows you to review the invoice before submitting it, or, you also are given one last opportunity to cancel out of the process if needed.

Creating an Invoice: Submitting the document

If needed additional fees, charges or discounts can be added to the invoice, before submitting it to the buyer.

FlexInvoice **Edit Invoice**

Invoice Currency Code: USD
Alternate Currency Code:
Invoice Number:
Related Invoice Number:
PO Number: 169-2245-46
Time of Supply:
Invoice Date: 09/15/2016
Comment:

Amount Exclusive of Taxes: 2.01
Value Added Tax Total (Invoice Currency): 0.14
Value Added Tax Total (Alternate Currency):
Non-Taxable Shipping Total: 0.00
Invoice Total (Invoice Currency): 2.15
Invoice Total (Alternate Currency):
Discount Rate:
Discount Amount:

Invoice Line#	PO Line#	Type of Supply	Qty	Previously Invoiced	UOM	Description	Supplier Part	Unit Price	Amount Exclusive of Tax
1	1	Sale	1	0	EV	Test Item 3	part num	2.0100	2.01

Discount Rate	Discount Amount	Tax Type	Tax Rate	Exempt	VAT Tax Amount (Invoice Currency)	Total Amount (Invoice Currency)	VAT Tax Amount (Alternate Currency)
<input type="text"/>	<input type="text"/>	ValueAddedTax	7%	No	0.14*	2.15	<input type="text"/>

* Calculated on discounted amount

Click on the Create Invoice button.

Creating an Invoice: Summary page

The summary page is a read only version of the document allowing a final review

FlexInvoice Edit Invoice **Summary**

Warning Message
Invoice will be sent to buyer upon submission.

Invoice Currency Code: USD Amount Exclusive of Taxes: 2.01
Alternate Currency Code: Value Added Tax Total (Invoice Currency): 0.14
Invoice Number: Test1234 Value Added Tax Total (Alternate Currency):
Related Invoice Number: Non-Taxable Shipping Total: 0.25
PO Number: 169-2245-46 Invoice Total (Invoice Currency): (null) 2.40
Time of Supply: Invoice Total (Alternate Currency):
Date of Issue: 09/15/2016 Discount Rate:
Discount Amount:
Comment: You may add your comments here.

Line Item Description

Line Number	PO Line Item Number	Type of Supply	Qty	UOM	Description	Supplier Part	Unit Price	Amount Exclusive of Tax	Discount Rate	Discount Amount	Tax Type	Tax Rate	Description	Exempt	Tax Amount (Invoice Currency)	Total Amount (Invoice Currency)	Tax Amount (Alternate Currency)
1	1	Sale	1.00	EV	Test Item 3	part num	2.0100	2.01			ValueAddedTax	7.00%	null	No	0.14	2.15	

Shipping Information
No Shipping Information Available at this time.

Cancel Submit

POWERED BY PERFECT COMMERCE [Privacy Policy](#) [Antitrust Policy](#) [About Perfect Commerce](#)

Cancel and Submit buttons



Creating an Invoice: Summary Page

The invoice has been submitted to the customer

FlexInvoice **Summary**

[Back to PO Summary](#)

Invoice Number:	Test1234	Amount Exclusive of Taxes:	2.01
Related Invoice Number:		Value Added Tax Total (Invoice Currency):	0.14
PO Number:	169-2245-46	Value Added Tax Total (Alternate Currency):	
Time of Supply:		Non-Taxable Shipping Total:	0.25
Date of Issue:	09/15/2016	Invoice Total (Invoice Currency): (Invoice)	2.40
Comment	You may add your comments here.	Invoice Total (Alternate Currency):	
Invoice Currency Code:	USD	Discount Rate:	
Country:	UNITED STATES	Discount Amount:	
		Invoice Status:	OPEN
		Workflow Status:	NONE
		Payment Type:	

Line Item Description																	
Invoice Line#	Po Line#	Type of Supply	Qty	UOM	Description	Supplier Part	Unit Price	Amount Exclusive of Tax	Discount Rate	Discount Amount	Tax Type	Tax Rate	Description	Exempt	VAT Tax Amount (Invoice Currency)	Total Amount (Invoice Currency)	VAT Tax Amount (Alternate Currency)
1	1	Sale	1	EV	Test Item 3	part num	2.01	2.01			ValueAddedTax	7.00%	null	No	0.14	2.15	

Shipping Information

No Shipping Information Available at this time.

[Attach files...](#)

POWERED BY PERFECT COMMERCE Privacy Policy Antitrust Policy About Perfect Commerce

Finding a previously created Invoice

If you need to pull the invoice back up for any purpose:

1. Open FlexInvoice
3. Change Document Type to Invoice
4. Enter the Invoice Number in the Invoice Number field
5. Select Search and it will open up in the Summary page

The screenshot shows the 'FlexInvoice Create New Invoice' form. The form contains several input fields and dropdown menus. Three callout boxes are present:

- 3. Change Document Type to Invoice:** A callout box pointing to the 'Document Type' dropdown menu, which is currently set to 'Invoice'.
- 4. Enter the Invoice Number in the Invoice Number field:** A callout box pointing to the 'Invoice Number' input field, which contains the text 'Test1234'.
- 5. Select Search and it will open up in the Summary page:** A callout box pointing to the 'Search' button.

Other fields in the form include: PO Number, PO Status (All), Type of Document (All), Date Range (Begin/End), Invoice Status (Open), Workflow Status (All), Amount Range (Minimum/Maximum), and Buyer Company Id. A 'Clear' button is also visible next to the 'Search' button. At the bottom right, there are links for 'Privacy Policy', 'Antitrust Policy', and 'About Perfect Commerce'.

Reminder: Payment Details

OSN- View- Create

Dashboard Order ASN

Help : Manage your documents by choosing one of the actions below

Print View Export to File Save & Send Document Save Document

This is a Credit Card order. Do not invoice! View Payment Information below.

Displaying 1-1/1 Page 1 /1 Go

Export	Number	Part Number	Description:	Unit:	Quantity:	Unit Price	Per	Price Unit	Amount	Action
<input type="checkbox"/>	1	Seller: C3418-0000-XLG Manufacturer: 1625	Disposable Underwear, Sure Care™ Protective	Can	15.000	30.400 U.S. Dollar			456.000	

Export checked to: ASN Invoice

Sub Total for the Order:	456.000 U.S. Dollar
Tax Total for the Order:	0.000 U.S. Dollar
Total Amount for the Order:	456.000 U.S. Dollar

Displaying 1-1/1 Page 1 /1 Go

- ▶ Tax Information
- ▶ Attachments
- ▶ **Payment Information**
- ▶ Terms of Delivery
- ▶ Transport Information

Customer Specific Reminder St Gobain

- ❶ Only the **delivery date** can be changed for St. Gobain orders. The delivery date change has to be made on the **line item level**.
- ❷ St. Gobain expects a response for every PO (either accepted or declined). If a PO remains without a response, reminders are sent after 48 hours. To change the recipient of the email notification, please contact supporteurope@perfect.com with following template:

Subject: Saint Gobain - OSN: Change notification email for [User ID]

Description:

Dear support team, may you please change the PO notification address as follow

Company name:

User ID:

Email to receive notifications:

Customer Specific Reminder Invensys

Invensys Purchase order is slightly different than the standard one:

- ⦿ There are few information in the header (no buyer address, no billing contact, no shipping information).
- ⦿ Shipping address appears at the line level.
- ⦿ An account code is provided in General Information
- ⦿ Payment terms are sent into « Payment Information ».
- ⦿ A Note can be sent by the requester into « Notes »
- ⦿ The supplier can only change the status of the PO, but no other details. If other changes are needed he has to contact the purchaser directly and ask for a change order (CO).

FAQs

FAQs

How will I be notified of new orders?

An email notification is generated and delivered to designated email address every time an order is placed.

Suppliers will use Perfect Commerce's OSN for Transactions (Hosted or Integrated) - URL and Credentials to be provided after initial training and before Go Live.

Whom should I contact in the case I have any of the following issues/requests?

- ❶ Password resets for Supply Order Manager/FlexInvoice
- ❷ Reporting issues in production
- ❸ Adding/removing Supply Order Manager/FlexInvoice accounts for your organization

Please contact **SupplierSupport@perfect.com** to ensure that your requests/issues are reported to the appropriate Perfect Commerce department.

Supplier Support can also be reached at: **(866) 889-8533**.



For further information, do not hesitate to contact us: customercare@proactis.com

+1 866 446 8203 - US Toll Free

+1 281 404 2095 - US Local

+33 1 77 62 56 20 - France

+49 308 967 794 11 - Germany

+34 911 88 00 64 - Spain

+44 2033 555021 - UK