

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



The background features several thick, orange, curved lines that sweep across the page from the left and bottom edges, creating a sense of motion and connectivity.

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>

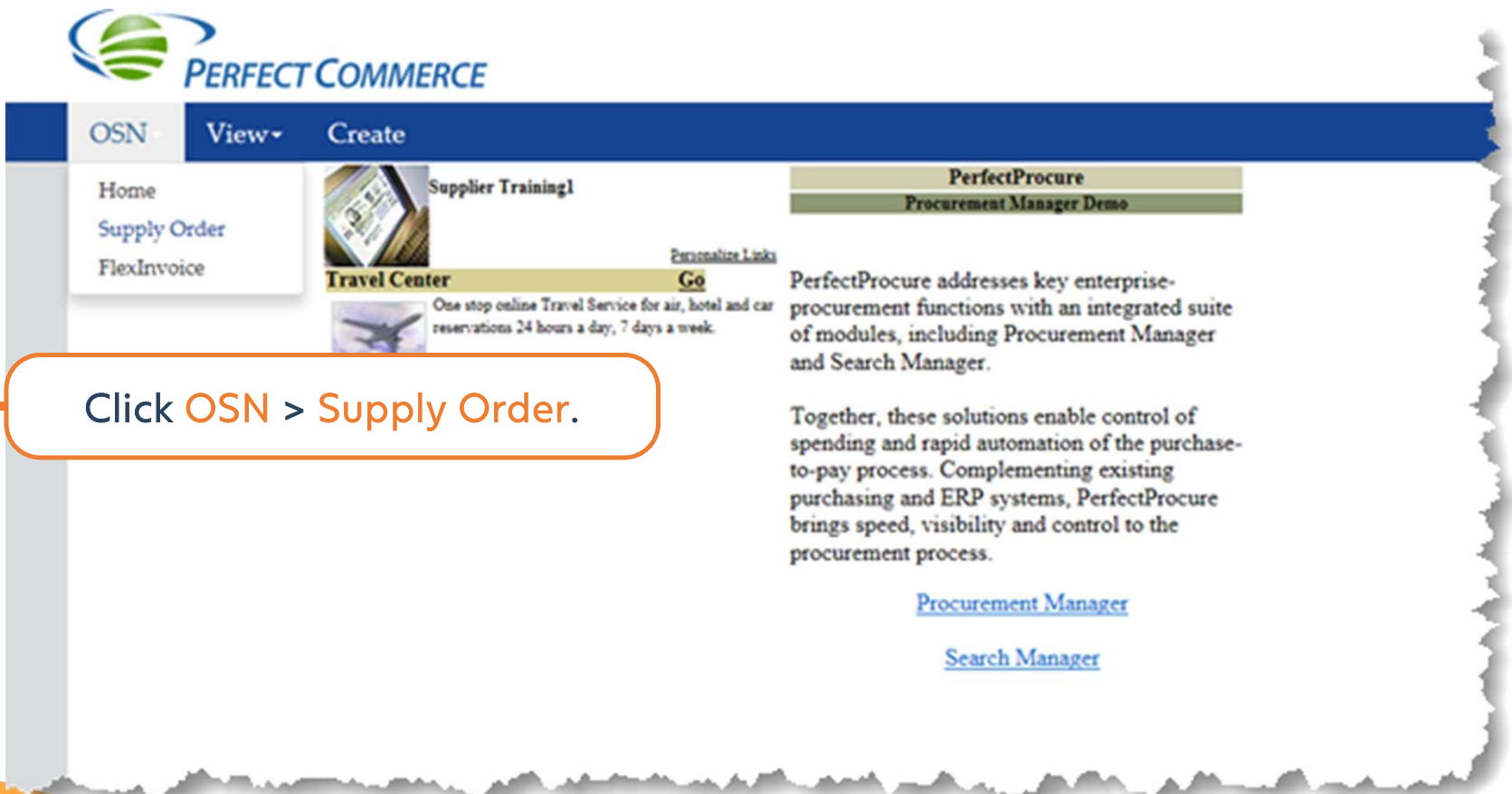
2. Type your **User ID** and **Password**.

3. Click **Login**.

The screenshot shows a web browser window with the URL <https://secure.perfect.com>. The page header includes the Perfect Commerce logo and a 'CONTACT US' button. The main content area features a 'Please Log In.' form with fields for 'User ID:' and 'Password:', a 'Forgot Password?' link, and a 'LOG IN' button. At the bottom, there are 'Download on the App Store' and 'ANDROID APP ON Google play' buttons. The footer contains copyright information and links for 'Terms of Use & Legal Information', 'Privacy Policy', and 'Intellectual Property Notice'. The Proactis logo is visible in the bottom right corner.

OSN Menu

(Online Supplier Network)



The screenshot displays the Perfect Commerce OSN (Online Supplier Network) interface. At the top, the Perfect Commerce logo is visible. Below it, a navigation bar contains 'OSN', 'View', and 'Create'. 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' link. The callout box contains the text 'Click OSN > Supply Order.' Other menu items include 'Supplier Training', 'Travel Center', and 'PerfectProcure Procurement Manager Demo'. The 'Travel Center' section includes a 'Personalize Links' button and a 'Go' button. The 'PerfectProcure' section contains a paragraph of text and two links: '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.

Personalize Links
Go

PerfectProcure
Procurement Manager Demo

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: 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 **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).
30 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

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 (;).
julie.criswell@perfect.c

Email Notification Regional Settings
Country: 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

Dashboard Order ASN

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

Preferences

Reset Submit

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

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

Maximum Quantity Decimals

Minimum Price Decimals

Maximum Price Decimals

3
3
2
4

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

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: | Search | Reset

Order Number: | Exact Match

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	US	
<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 Buyer Order Contact: Order Contact: Michaud,John-z384646 Contact ID: Telephone: 757-766-5862 Email: John.michaud@perfect.com Fax:	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 Billing Order Contact: Order Contact: Lienard,Nathan Contact ID: Telephone: 1-999-999-9997 Email: nathan.lienard@perfect.com Fax: 555-5555	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:
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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	Shipment Choice Other
Status New Order <input type="button" value="v"/>	Payment Choice Not Applicable		
Status Other	Payment Choice Other		
Note To Buyer: <input type="text"/>			

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:
Commodity Code:
Item Type: Goods

Payment: Not Applicable
PAYMENT OTHER
Max Backorder Allowed: 0.000

Shipment: Not Applicable
Shipment Other:
Requested Delivery Date: Jun 1, 2016 12:00 PM

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:
Location:

Tax Amount:
0.00 U.S. Dollar
Percentage:
0.00

Tax Category:
Standard Rate

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

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

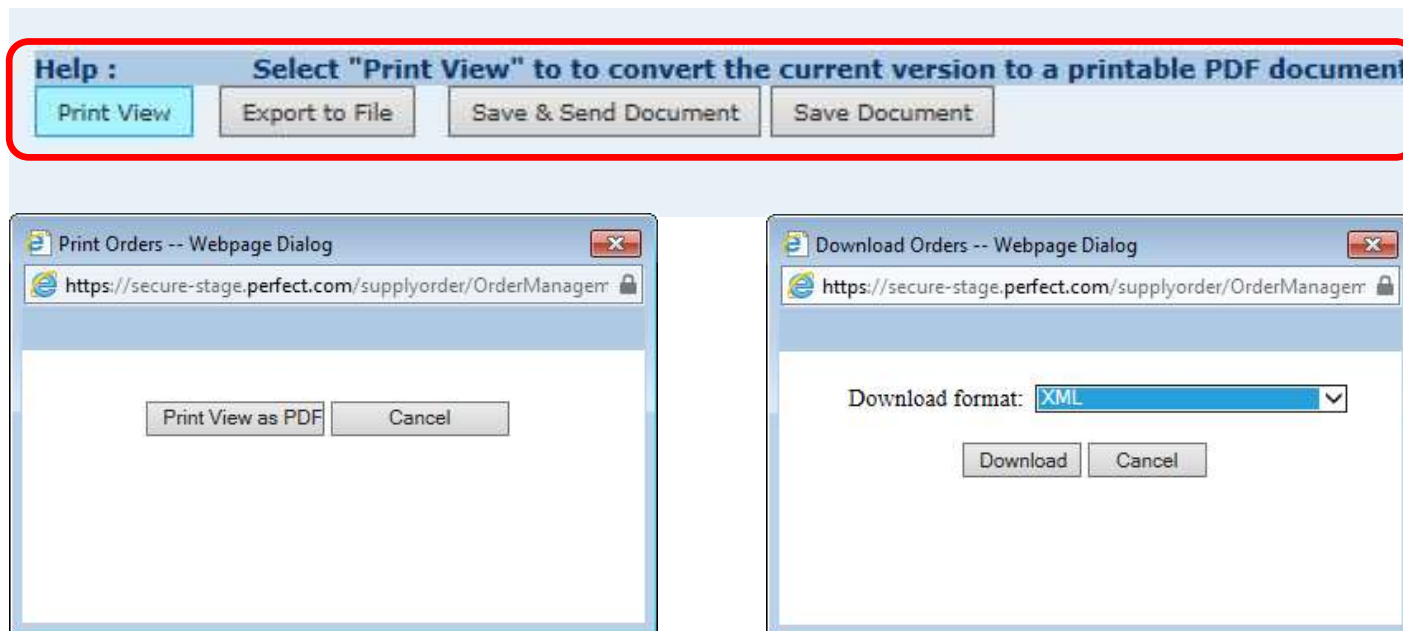
Notes

General Notes:

▶ Additional Notes

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

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:

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

Status
Accepted

Status Other
Accepted
Accepted With Changes
Cancelled
New Order

Supplier Ship By Date:
May 17, 2016

Payment Choice
Not Applicable

Payment Choice Other

Note To Buyer:
Test for training only

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

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

Accepting an Order

A message confirmation will be displayed with the status of "*Your order has been updated and an Order Response sent to the customer.*" in red font.

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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 order by clicking on 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	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	Buyer Order Contact: Order Contact: Michaud,John-2384646 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-2384646 Contact ID: Telephone: 757-766-5862 Email: John.michaud@perfect.com Fax:
--	--	---	--	--

General Information

Order Date	Account Code	Buyer Ship By Date:	Currency:
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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 'General Information' section includes fields for Order Date (Sep 12, 2016 3:52 PM), 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. Below this is a table with columns: Export, Number, Part Number, Description, Unit, Quantity, Unit Price, Per, Price Unit, Amount, and Action. The first row shows 'Test Item 3' with a quantity of 1.000 and a price of 2.01. A callout box points to the 'Action' column for this row, which contains an edit icon. A summary table at the bottom right shows 'Total for the Order' with amounts of 2.01 U.S. Dollar, 0.00 U.S. Dollar, and 2.01 U.S. Dollar.

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 D
Lees Summit
US
Billing Order Contact:
Order Contact: No Contact specified
Contact ID:
Telephone:
Email:
Fax:

64063
Shipping Order Contact:
Order Contact: Babbit,Kelly-z98531
Contact ID:
Telephone: 8164484000
Email: kelly.babbit@escout.com
Fax: 8164484000

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

PerfectProcure
Procurement Manager Demo

Personalize Links

Travel Center 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

Procurement Manager

Search Manager

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Privacy Policy Antitrust Policy About Perfect Commerce

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

FlexInvoice Home Page

The screenshot displays the FlexInvoice Home Page interface. At the top left is the Perfect Commerce logo. On the top right, there are two dropdown menus: 'ACME Industrial' and 'Supplier Training1'. Below the logo is a navigation bar with 'OSN', 'View', and 'Create' options. The main content area is titled 'FlexInvoice' and 'Create New Invoice'. It features a grid of search filters: PO Number, PO Status (All), Type of Document (All), Date Range (Begin and End), Document Type (PO), Invoice Number, Invoice Status (All), Workflow Status (All), Amount Range (Minimum and Maximum), and Buyer Company Id (with an Id Search icon). Below the filters are 'Search' and 'Clear' buttons. A red-bordered box highlights a message: 'You have DISPUTED invoices.' A blue-bordered box labeled 'Message Center' points to this notification. 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.

The screenshot shows the FlexInvoice search filters page. The page header includes the Perfect Commerce logo and navigation links for OSN, View, and Create. The main content area contains several search filters: PO Number, Invoice Number, PO Status, Type of Document, Date Range (Begin and End), Amount Range (Minimum and Maximum), Document Type, Workflow Status, and Buyer Company Id. The PO Status dropdown menu is highlighted with a red box, and the 'Not Invoiced' option is selected. A callout box points to this dropdown with the text 'Change the PO Status to Not Invoiced'. A red box highlights a message at the bottom: 'You have DISPUTED invoices.'

Change the PO Status to Not Invoiced

You have DISPUTED invoices.

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Searching for an Invoice: Status

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

The screenshot shows the FlexInvoice search interface. Callouts highlight the PO Number field, the Date Range filter (set to 2015-09-14 to 2016-09-14), and the Search button. A table of search results is shown below, with the Status column highlighted.

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.

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Creating an Invoice: Status and Add to Invoice columns

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"/>

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.

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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
Amount Exclusive of Taxes: 2.01
Alternate Currency Code:
Value Added Tax Total (Invoice Currency): 0.14
Invoice Number:
Value Added Tax Total (Alternate Currency):
Related Invoice Number:
Non-Taxable Shipping Total: 0.00
PO Number: 169-2245-46
Invoice Total (Invoice Currency): 2.15
Time of Supply:
Invoice Total (Alternate Currency):
Invoice Date: 09/15/2016
Discount Rate:
Discount Amount:
Comment:

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.

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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 Currency Code:	USD	Discount Rate:	
		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...](#)

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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 specific elements are highlighted with red boxes and callout boxes:

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

Other visible fields 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 present. At the bottom right, there are links for Privacy Policy, Antitrust Policy, and About Perfect Commerce.

Reminder: Payment Details

The screenshot shows a web application interface with a top navigation bar containing 'OSN', 'View', and 'Create'. Below this is a breadcrumb trail: 'Dashboard > Order > ASN'. A help box is visible with the text 'Help: Manage your documents by choosing one of the actions below' and buttons for 'Print View', 'Export to File', 'Save & Send Document', and 'Save Document'. The main content area displays a table with columns 'Export', 'Number', 'Part Number', and 'Description:'. The table contains one row with '1' in the 'Number' column, 'Seller: C3418-0000-XLG' and 'Manufacturer: 1625' in the 'Part Number' column, and 'Disposable Underwear, Sure Care™ Protectiv' in the 'Description' column. Below the table are buttons for 'Export checked to: ASN' and 'Invoice'. A sidebar on the left lists navigation options: 'Tax Information', 'Attachments', 'Payment Information' (highlighted with a red box), 'Terms of Delivery', and 'Transport Information'. A 'Credit Card Information' popup window is open, showing the following details: Cardholder's Name: John Doe, Credit Card: 4442 4569 4421 4477, and Expiration Date: 12/2034. A text instruction above the popup reads: 'The following information will be displayed. Please get the CVV from your G6 contact.'

TO RETRIEVE IT CARD INFO

be no invoicing in
der for G6 suppliers.
ick on **Payment**
on to retrieve the
information.

Customer Specific Reminder St Gobain

- Only the **delivery date** can be changed for St. Gobain orders. The delivery date change has to be made on the line item level.
- 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?

- Password resets for Supply Order Manager/FlexInvoice
- Reporting issues in production
- 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