# Services Procurement: Order Management

## Supplier Standard Training

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# Agenda

- Welcome to the Services Procurement: Order Management Supplier Standard Training
- This training session will cover the following topics:

- Introduction
  - ✓ Session Objectives
  - ✓ Overview
- Login and Overview
- Reviewing, Accepting or Rejecting a Purchase Order
- Creating a Service Entry Sheet
- Invoicing
- Additional Resources and Information

# Session Objectives

This session will cover some features and functionalities of the Order Management system for a standard Services Procurement cycle

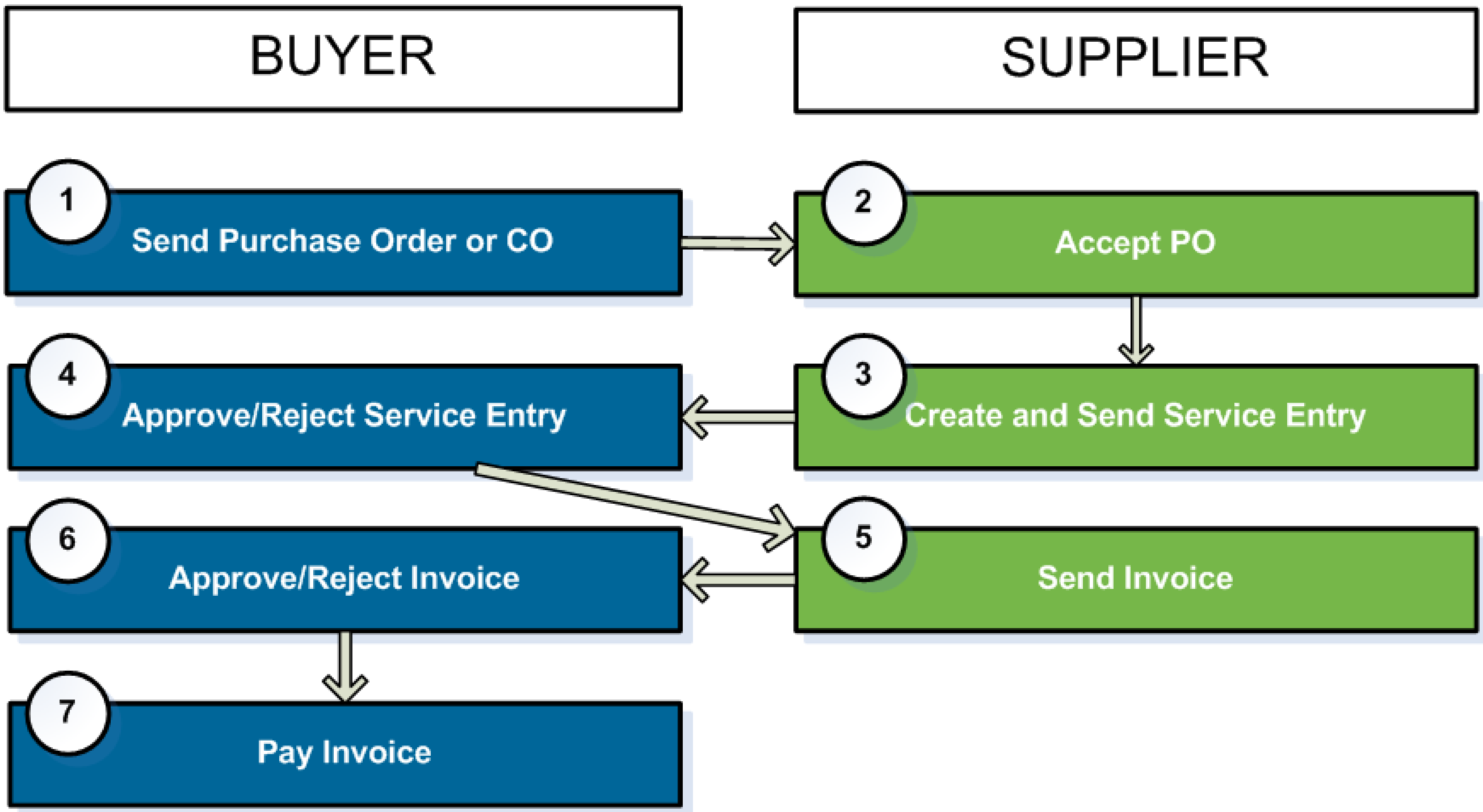
It will provide you with step-by-step instructions on processing Purchase Orders, Service Entry Sheets and Invoices

At the end of this Training tutorial, you will be able to retrieve, review, and respond to Purchase Orders via the Order Management tool.

# Overview

- Hubwoo provides The Business Network to help you and your customers to automate the ordering and invoicing business processes to decrease your days sales outstanding.
- For all transactions from Buyer received through the Hubwoo Portal, the responses and subsequent transactions must also be through the Hubwoo Portal.
- Order Management is a dynamic tool that is compatible to many business processes. This training will cover the Services Procurement cycle using Order Management to illustrate its functionality in action.
- Please note:  Hubwoo’s Order Management system is dynamic and has been configured to support a Buyer’s individual requirements, as well as, regional order management regulatory requirements. Your interaction with Order Management may differ between clients and/or regions.

# Document Workflow



# Overview

## 3-step process

1. Review, Accept, or Reject PO

2. Create Service Entry Sheet (SES)

3. Submit electronic invoice (e-invoice)

**Step 1**: After the Buyer sends an Order to the Supplier's Order Management Tool, the Supplier responds by sending a POR (Accept or Reject). *POR is not mandatory for Limit Orders. This is a buyer dependent setting.*

**Step 2**: The supplier then creates a Service Entry Sheet (SES) from a PO. Suppliers can create more than one SES from a single PO.

**Step 3**: The supplier then submits an Invoice from the approved SES to the Buyer via the Order Management tool.

*SES is created based on the PO or the latest CO. If SES configuration is enabled, all PO/CO are flipped into SES first and go through a predefined work flow before the Invoice creation.*

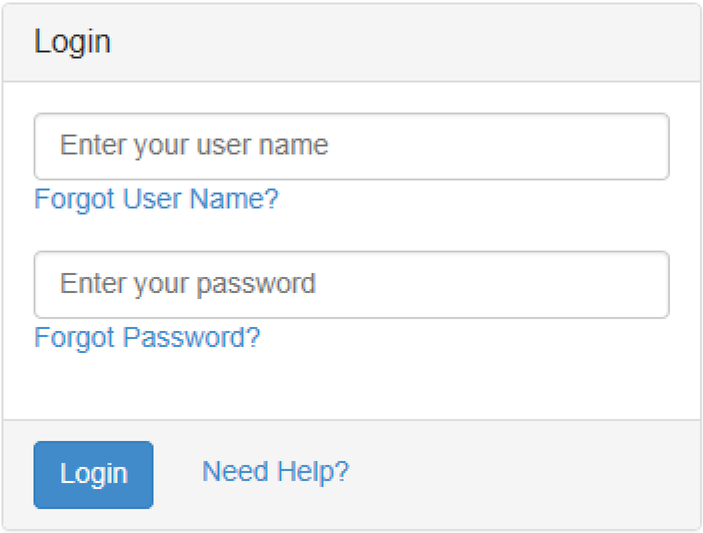
**Document Route**

PO / CO → SES → SESR → Invoice

# Login and Overview

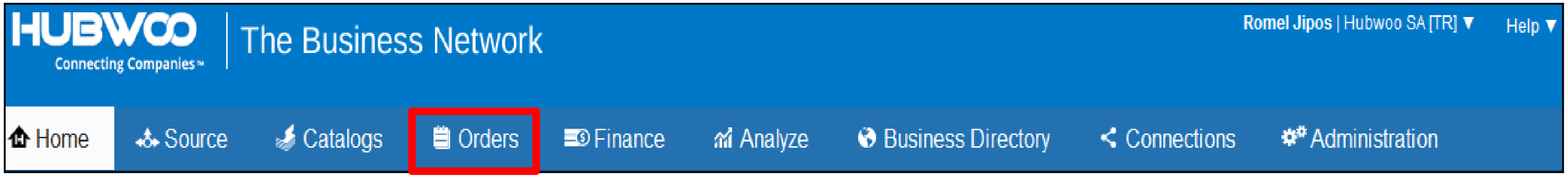
# Login Page

- You will receive an e-mail from customercare@hubwoo.com with your Login credentials. Make sure you are connected to the internet, and click on the link provided in the email, or go to https://portal.hubwoo.com
- Then enter your User Name and Password, and click on Login.



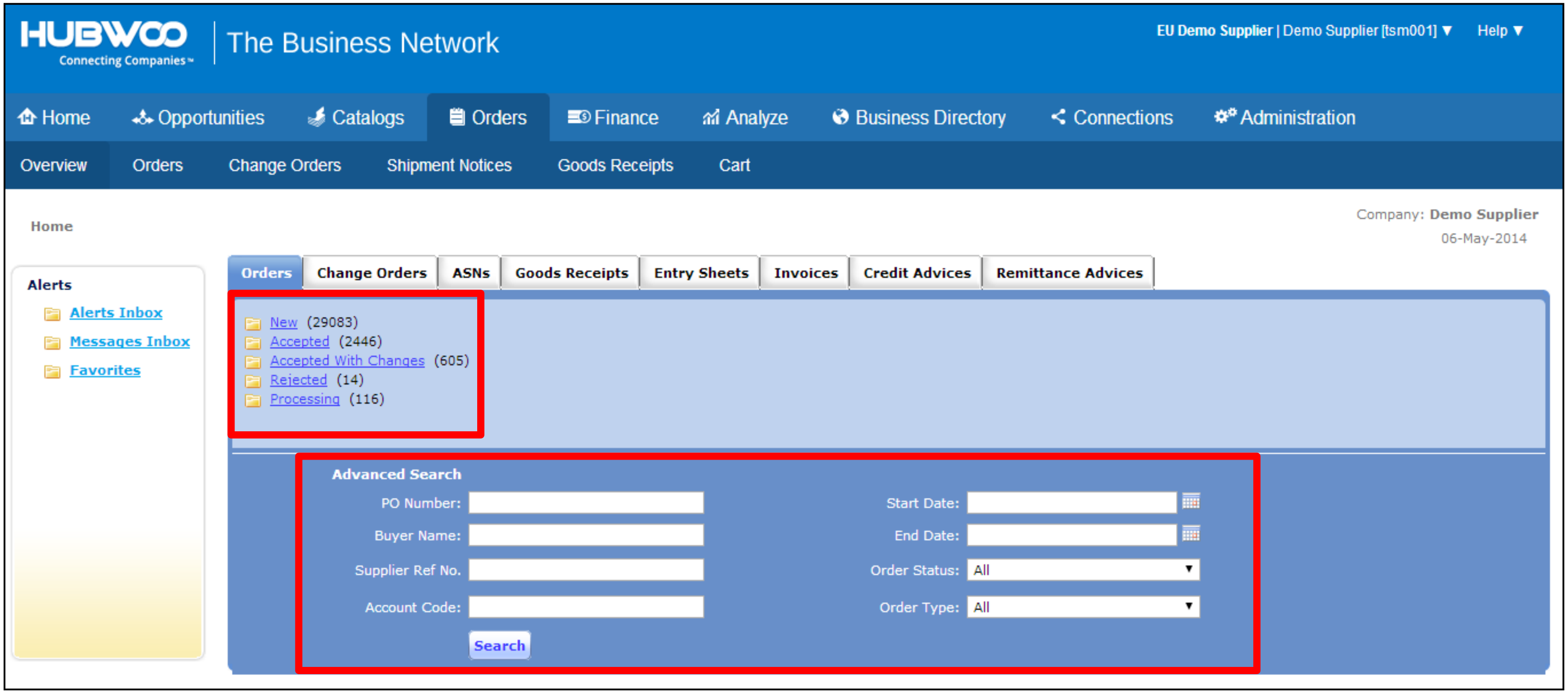
# Landing Page

- To use the Order Management tool you can click on Orders Tab from the Menu Bar.



# Order Page

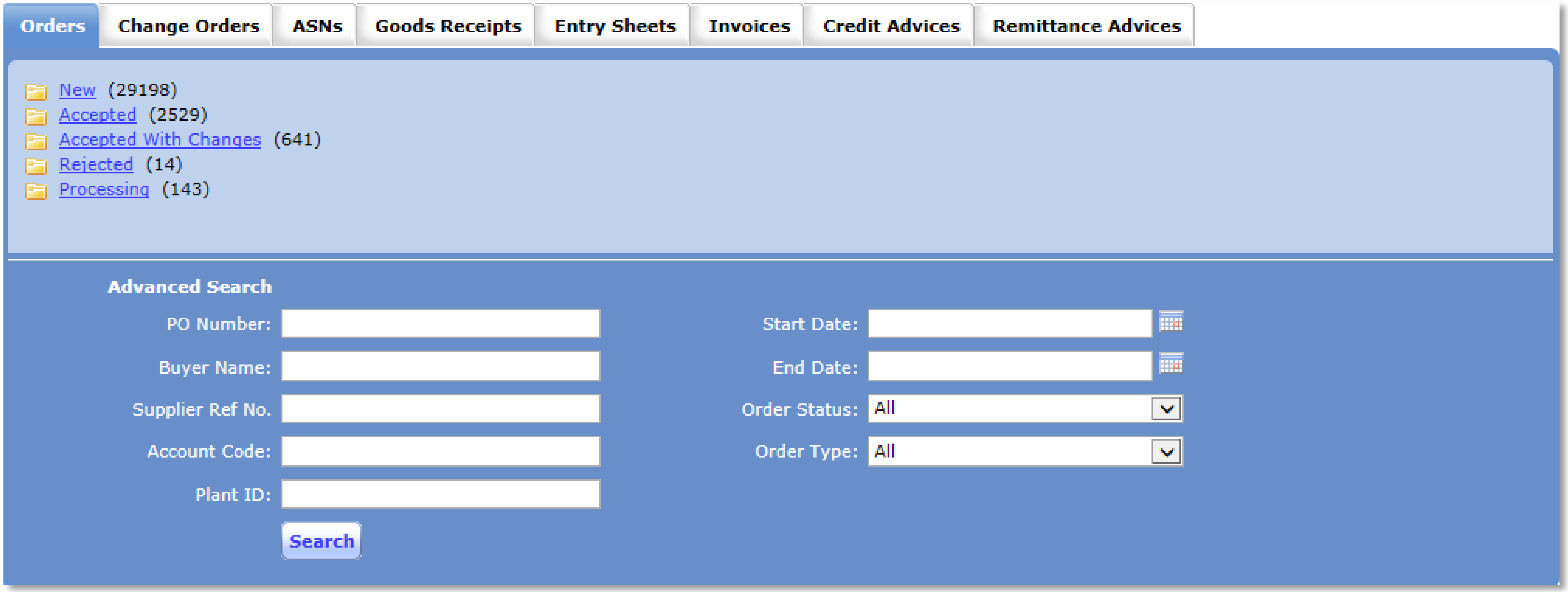
- After you have Clicked on Orders from either option the following screen will appear.




- Search provides the capability to look for a particular PO, by PO number, Supplier Reference number, Start and End Date, Status, or Account Code.

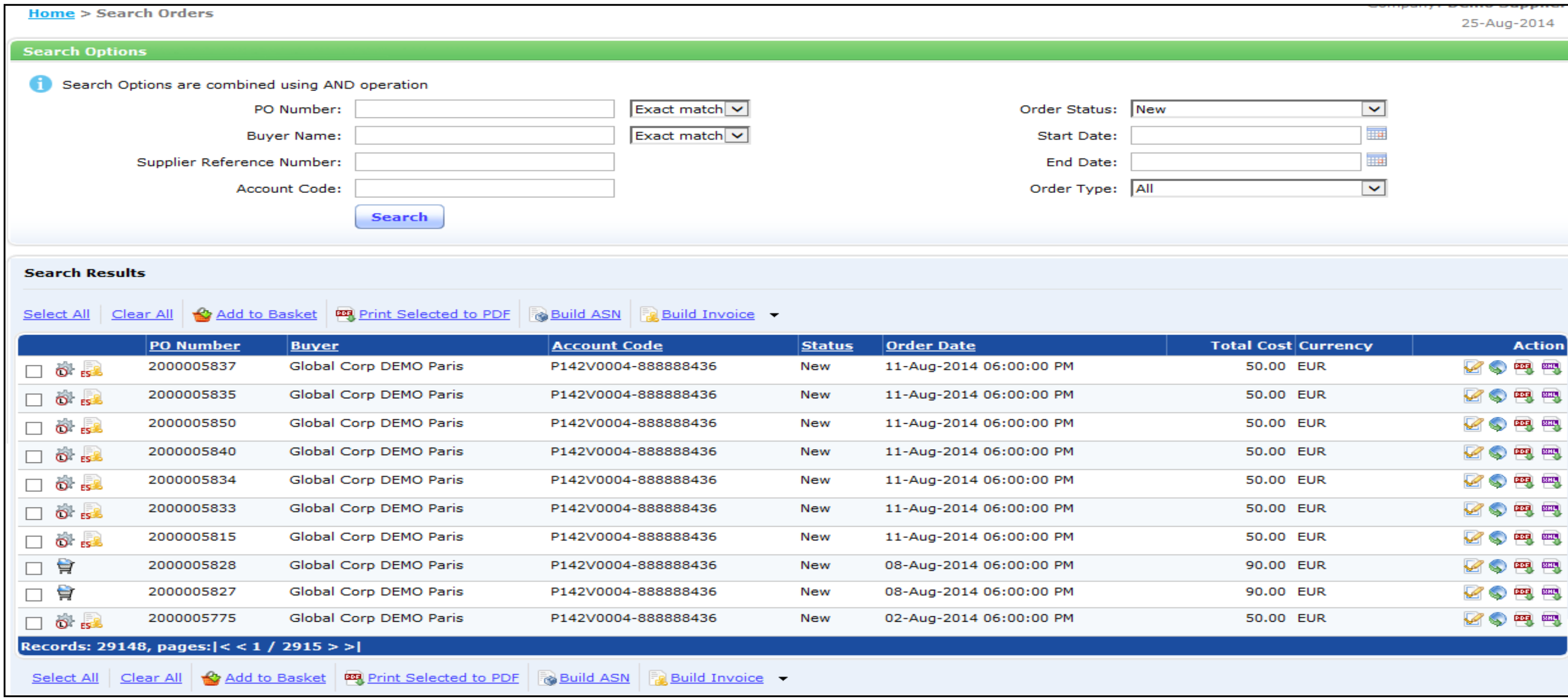
# Folders

- As New Orders are delivered, they are posted in the New Order folder. Click on New Orders to view these orders.



# Search Orders

- Various search criteria may be entered at the top of the page to locate a specific PO. Page numbers or arrows at the bottom of the page may also be used to scroll or select pages.



# Icons

- POs can be identified by the PO number, Buyer, Account Code and Order Date. To the right are the Action icons which are related to the PO and will be reviewed in detail in this presentation.

**Search Results**

Select All | Clear All | Add to Basket | Print Selected to PDF | Build ASN | Build Invoice

| | PO Number | Buyer | Account Code | Status | Order Date | Total Cost | Currency | Action |
|---|---|---|---|---|---|---|---|---|
| | 2000005837 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005835 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005850 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005840 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005834 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005833 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005815 | Global Corp DEMO Paris | P142V0004-888888436 | New | 11-Aug-2014 06:00:00 PM | 50.00 | EUR | |
| | 2000005828 | Global Corp DEMO Paris | P142V0004-888888436 | New | 08-Aug-2014 06:00:00 PM | 90.00 | EUR | |
| | 2000005827 | Global Corp DEMO Paris | P142V0004-888888436 | New | 08-Aug-2014 06:00:00 PM | 90.00 | EUR | |

# Review and Accept a PO

# Review and Accept a PO

## 3 Main Steps for the Supplier

1. **Accept or Reject the Purchase Order**
2. **Create Service Entry Sheet (SES)**
3. **Submit e-invoice**

# Quick Steps – Review and Accept PO

1. Open the PO
2. Enter Supplier Ref. No.
3. Click Save and Send

# Review and Accept PO

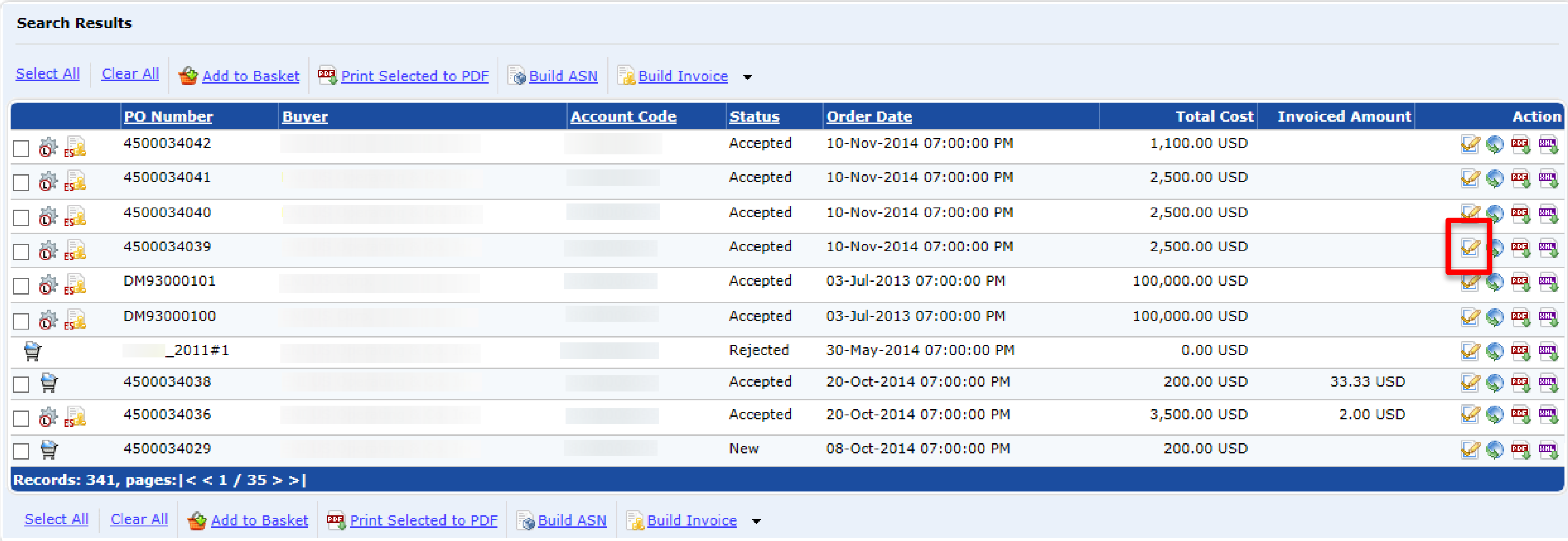
1. Open the PO
   - On Orders Tab click on the New Folder.

# Review and Accept PO

:Icons to identify Services PO. The second icon suggests that a ***Service Entry Sheet*** can be created.

: Icon to identify a Material PO

: Icon to indicate attachments are available in the PO



Search Results

Select All | Clear All | Add to Basket | Print Selected to PDF | Build ASN | Build Invoice

| PO Number | Buyer | Account Code | Status | Order Date | Total Cost | Invoiced Amount | Action |
|---|---|---|---|---|---|---|---|
| 4500034042 | | | Accepted | 10-Nov-2014 07:00:00 PM | 1,100.00 USD | | |
| 4500034041 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| 4500034040 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| 4500034039 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| DM93000101 | | | Accepted | 03-Jul-2013 07:00:00 PM | 100,000.00 USD | | |
| DM93000100 | | | Accepted | 03-Jul-2013 07:00:00 PM | 100,000.00 USD | | |
| _2011#1 | | | Rejected | 30-May-2014 07:00:00 PM | 0.00 USD | | |
| 4500034038 | | | Accepted | 20-Oct-2014 07:00:00 PM | 200.00 USD | 33.33 USD | |
| 4500034036 | | | Accepted | 20-Oct-2014 07:00:00 PM | 3,500.00 USD | 2.00 USD | |
| 4500034029 | | | New | 08-Oct-2014 07:00:00 PM | 200.00 USD | | |

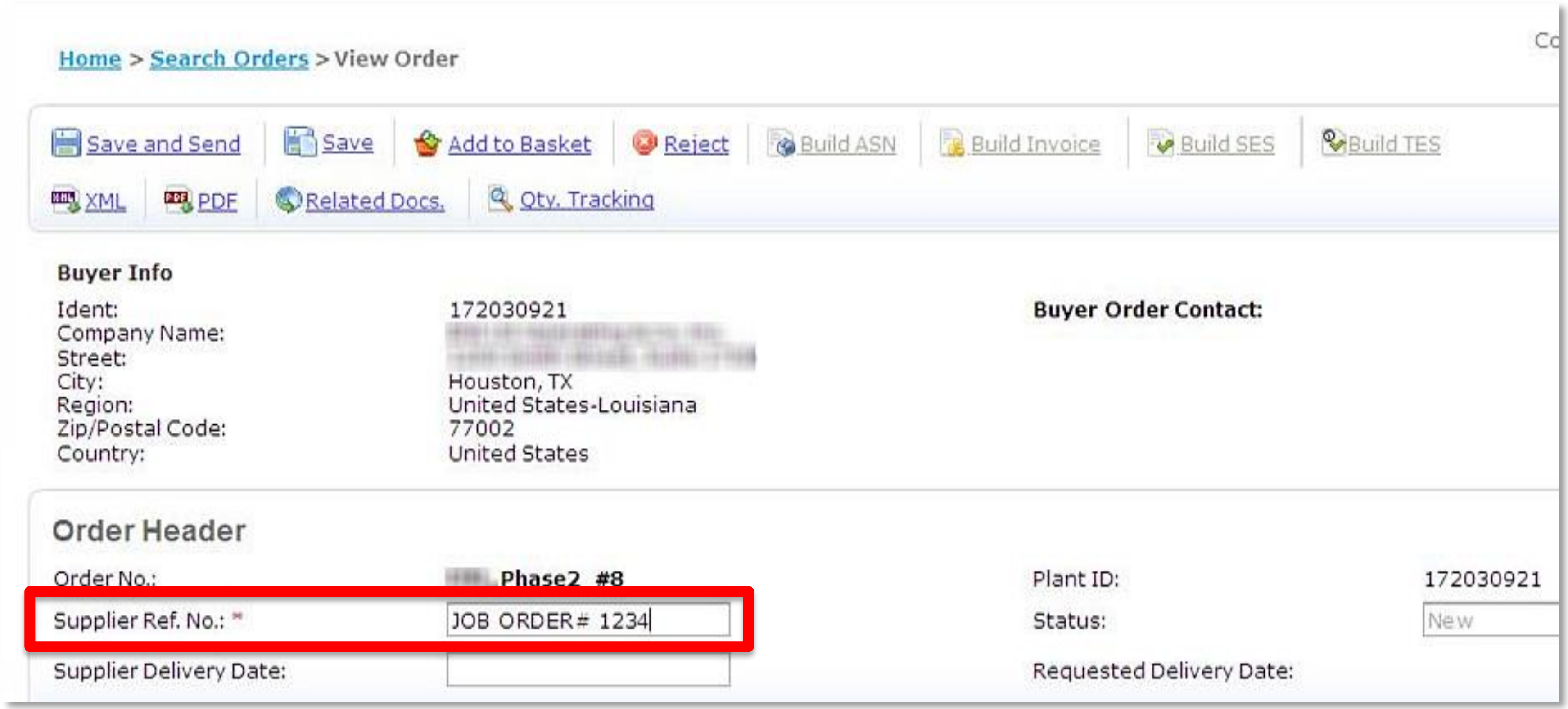
Records: 341, pages:|< < 1 / 35 > >|

Select All | Clear All | Add to Basket | Print Selected to PDF | Build ASN | Build Invoice

- On 'Action' column, Click to 'Open PO'

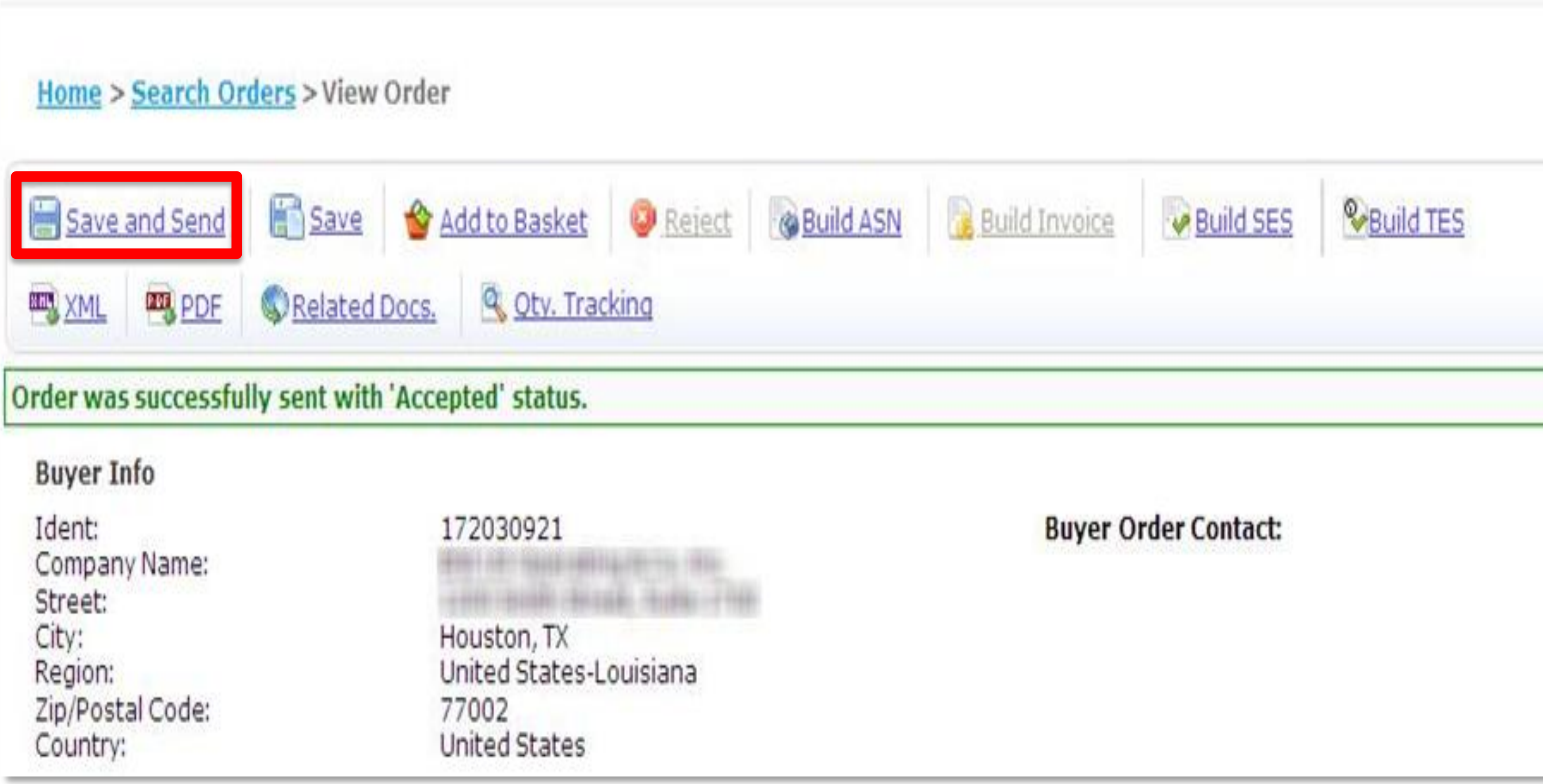
# Quick Steps – Review and Accept PO

2. Enter ‘Supplier Ref. No’
   - “Supplier-Determined” internal control number (e.g. job number, quotation number, etc. )



# Quick Steps – Review and Accept PO

3. Click Save and Send



# Quick Steps – Review and Reject PO

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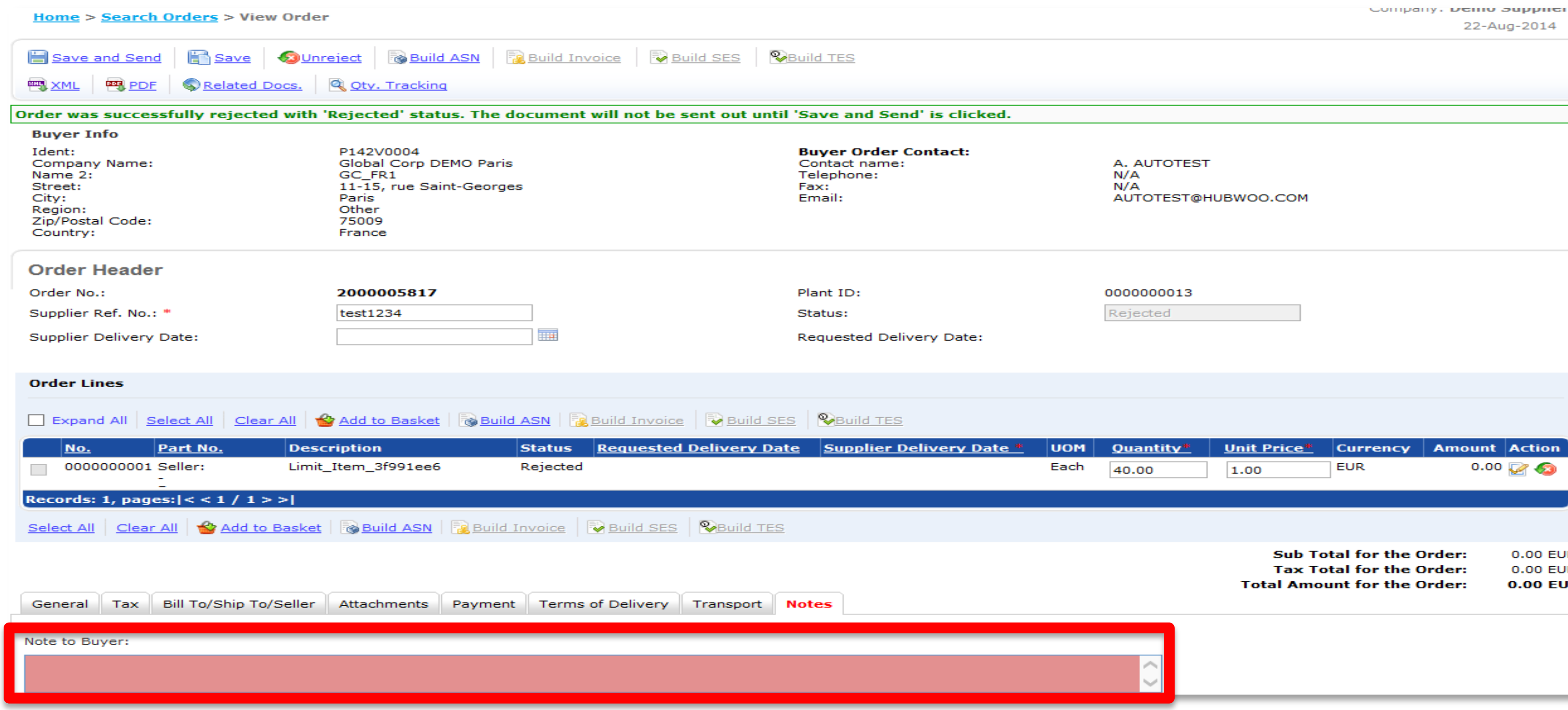
- Click Reject if PO cannot be accepted (e.g. amount not enough, cannot fulfill requested service)




- In case of rejection the reason must be entered in the “Note to Buyer” fields (tab “Notes”).

# Highlights of this chapter

- **PO**: Purchase Order
  - The request for goods or services (Some buyer might call the Service PO: "Call-Off")
  - Created by buyer and sent to supplier through Hubwoo
- **Supplier Reference Number**:
  - "Supplier-Determined" internal control number (e.g. job number, quotation number, etc. )

- Service should be performed within PO validity period
- Requested services should be within the contract provisions
- Contact your Buyer Representative for any PO issues (e.g. insufficient funds, validity period incorrect, need additional information about the PO, etc).
- Attachments can be sent by Buyer & and are available in the PO (Attachments tab )
- Note To Buyer visible in the Notes tab.

# Creating a Service Entry Sheet

# Create Service Entry Sheet

## 3-step process

1 Accept or Reject the Purchase Order

2 Create Service Entry Sheet (SES)

3 Submit einvoice

# Overview

- A Service Entry Sheet or Field Ticket is a detailed description of the services performed based on a Purchase Order. Those documents are used to get an approval from the customer on the performed services, so that those can be invoiced.
- SES stands for Service entry sheet
- Customers use the SES to break down the cost of sales into several components (i.e. raw materials, labor costs) of the PO Amount

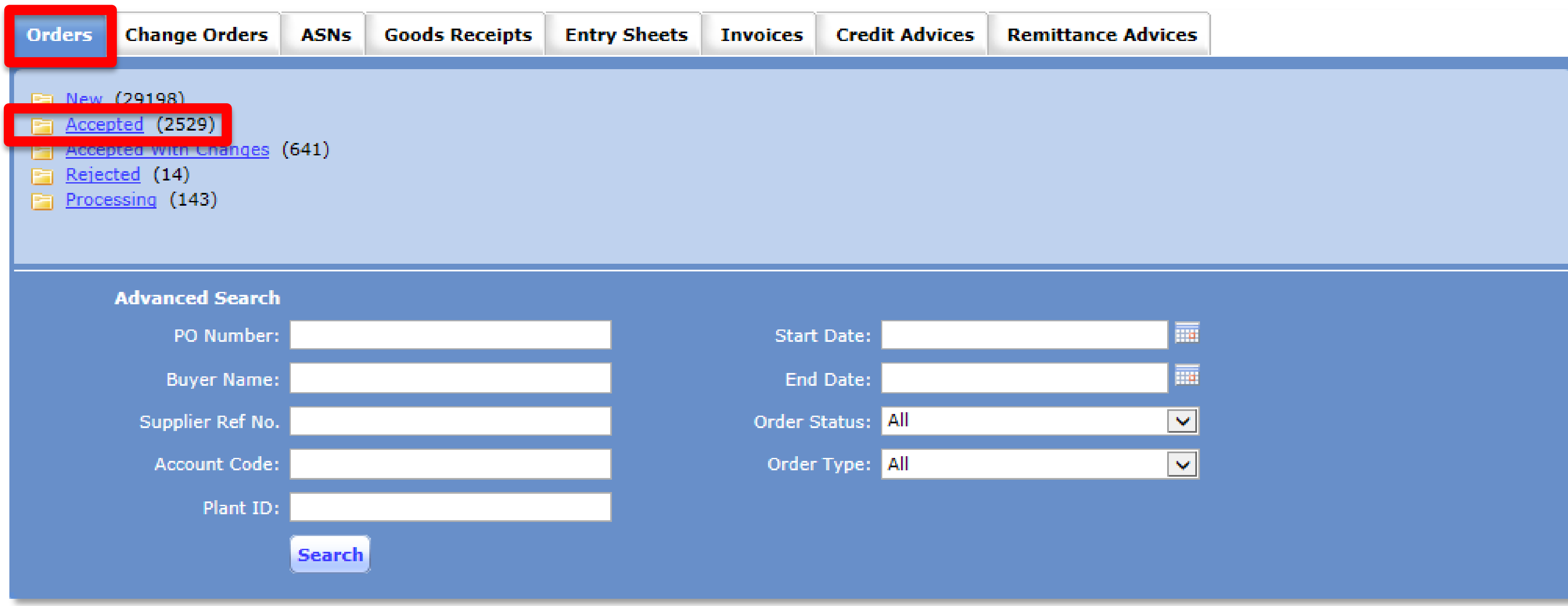

- Create an SES for Orders marked with the (  ) icon
- SES is created from a single PO. If the PO line contains sub-lines then sub-lines are also flipped into the ES
- Supplier Company needs to be setup to be able to use SES. All requests from the Buyer company will be sent to the Onboarding Team.

# Quick Steps – Create Service Entry Sheet

1. Open Approved PO
2. Build SES
3. Select SES line items from catalog
4. Attach invoice and supporting documents
5. Click Save and Send
6. Check SES Status

# Create Service Entry Sheets

1. Open Accepted PO
   - Go to ‘Orders’ tab,
   - Click ‘Accepted’ folder



# Create Service Entry Sheets

- Click  to 'Open PO'

**Search Results**

Select All | Clear All | Add to Basket | Print Selected to PDF | Build ASN | Build Invoice

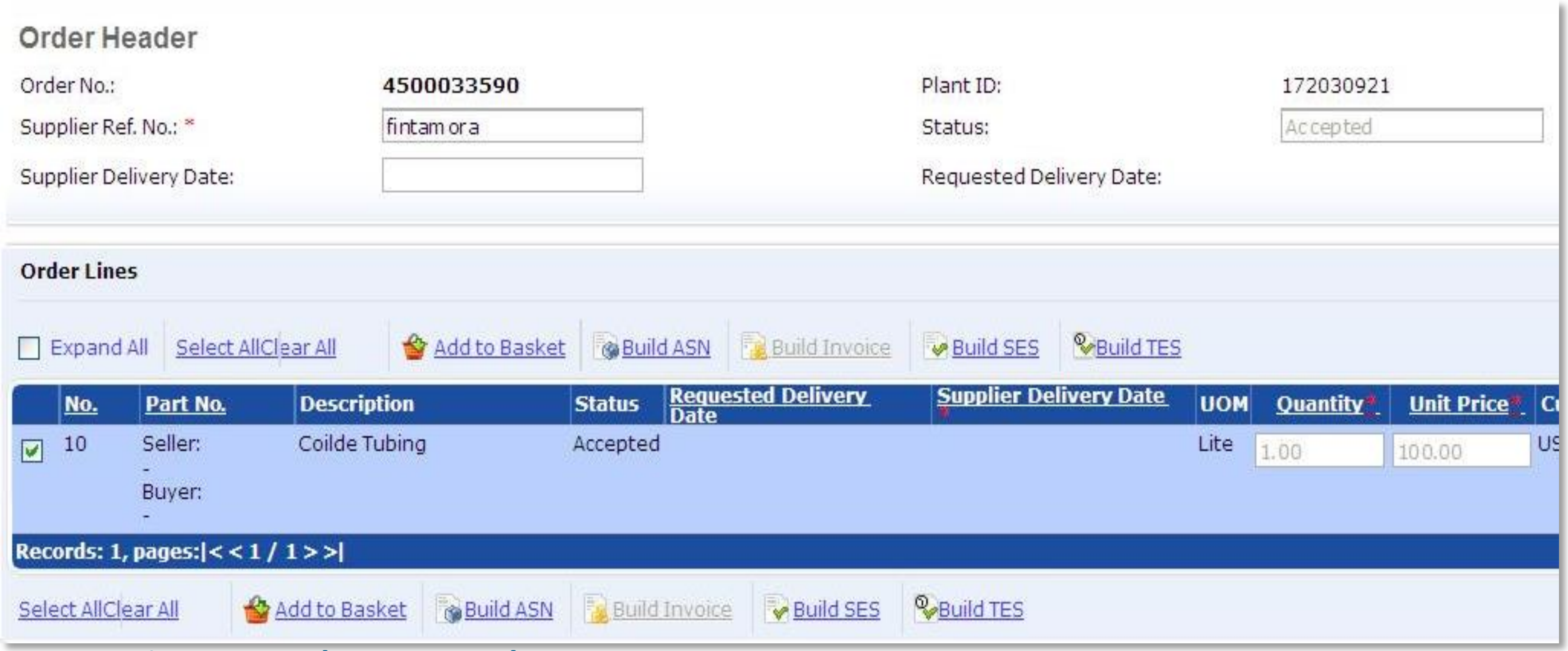
| PO Number | Buyer | Account Code | Status | Order Date | Total Cost | Invoiced Amount | Action |
|---|---|---|---|---|---|---|---|
| 4500034042 | | | Accepted | 10-Nov-2014 07:00:00 PM | 1,100.00 USD | | |
| 4500034041 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| 4500034040 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| 4500034039 | | | Accepted | 10-Nov-2014 07:00:00 PM | 2,500.00 USD | | |
| DM93000101 | | | Accepted | 03-Jul-2013 07:00:00 PM | 100,000.00 USD | | |
| DM93000100 | | | Accepted | 03-Jul-2013 07:00:00 PM | 100,000.00 USD | | |
| _2011#1 | | | Rejected | 30-May-2014 07:00:00 PM | 0.00 USD | | |
| 4500034038 | | | Accepted | 20-Oct-2014 07:00:00 PM | 200.00 USD | 33.33 USD | |
| 4500034036 | | | Accepted | 20-Oct-2014 07:00:00 PM | 3,500.00 USD | 2.00 USD | |
| 4500034029 | | | New | 08-Oct-2014 07:00:00 PM | 200.00 USD | | |

**Records: 341, pages:|< < 1 / 35 > >|**

Select All | Clear All | Add to Basket | Print Selected to PDF | Build ASN | Build Invoice

# Create Service Entry Sheets

2. Build SES
   - Tick PO Item checkbox
   - Click 


**Service PO can have several Items :**

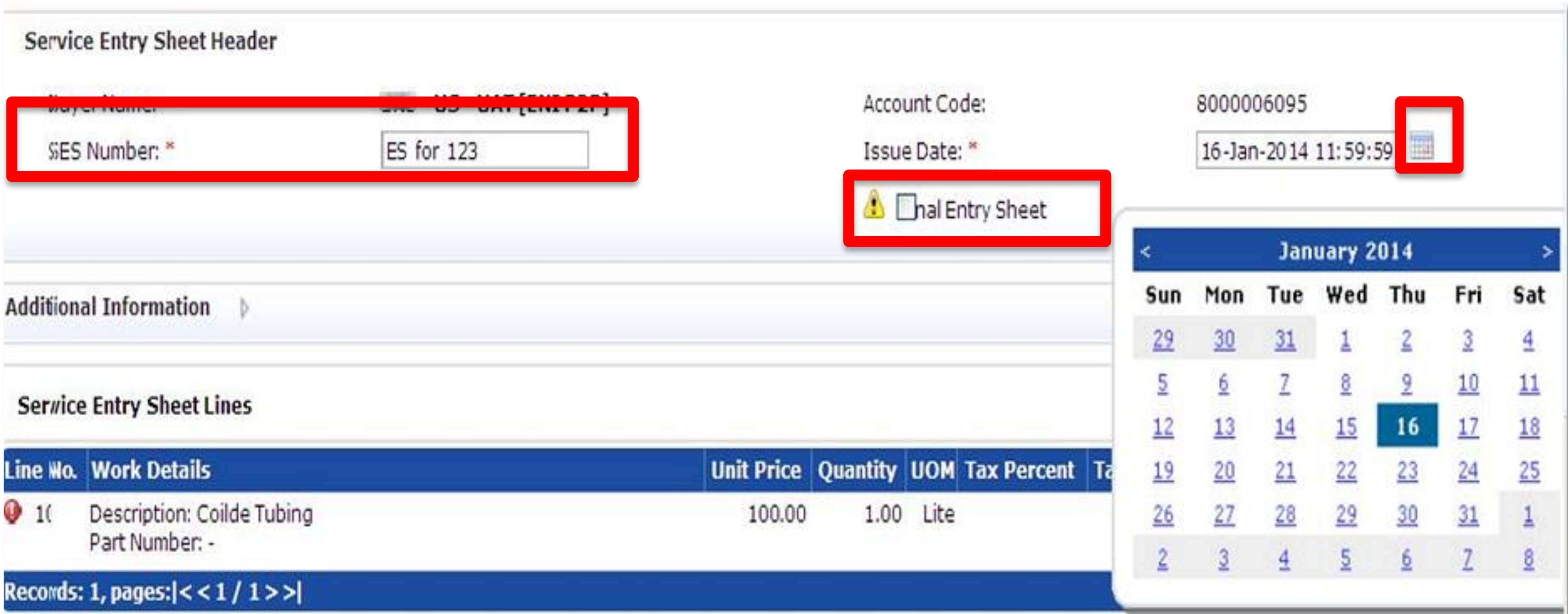
Select only one item to create the SES.

Multi PO item SES will be automatically rejected by Buyer

# Create Service Entry Sheets

- Enter "SES Number" (Internal Field ticket Number)
- Enter "Issue Date" (Field Ticket Issue Date) – click on Calendar
- If the SES you are entering will be the last one related to the scope of work covered by the particular PO, please mark as "Final Entry Sheet"

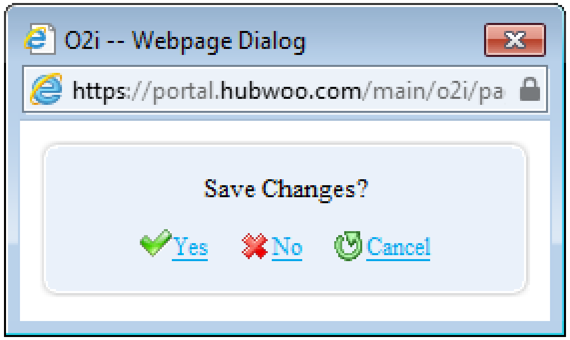


# Create Service Entry Sheets

- Click 'View Entry Sheet Line'
- Save Changes – click Yes

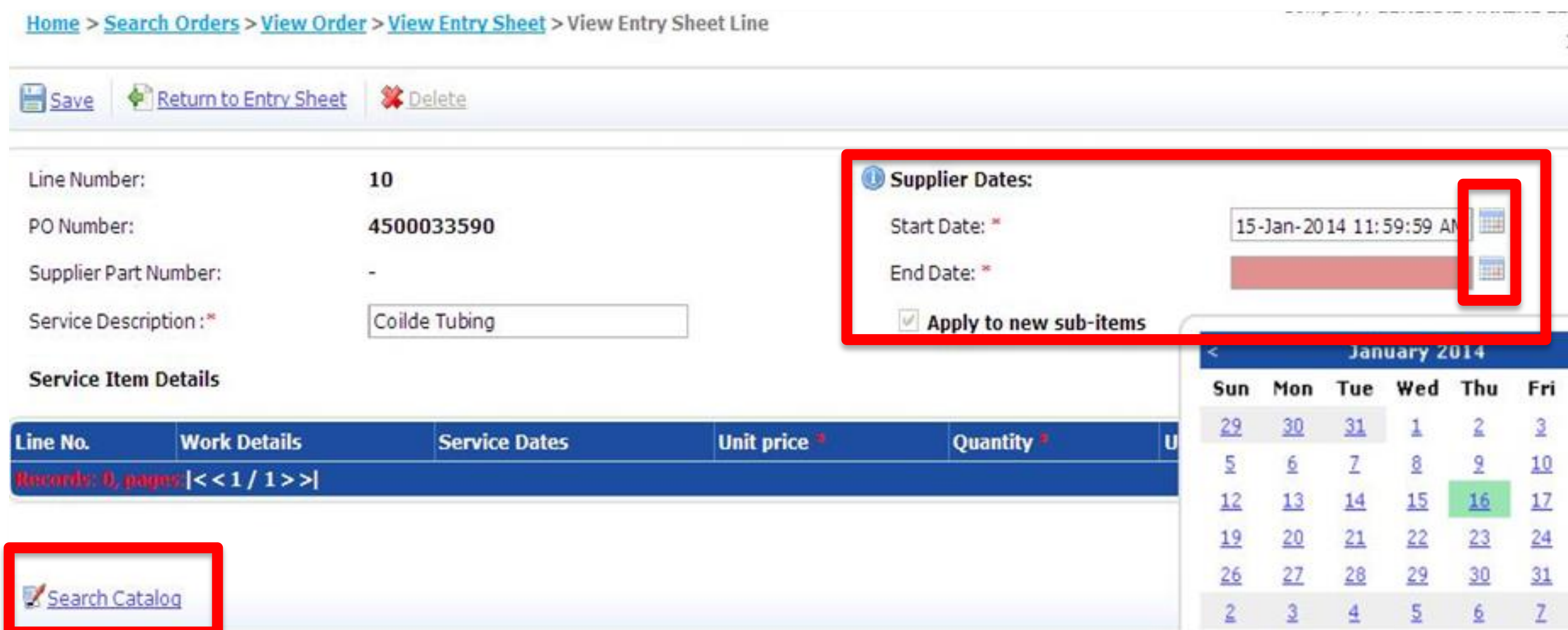
**Service Entry Sheet Lines**

| Line No. | Work Details | Unit Price | Quantity | UOM | Tax Percent | Tax Total | Amount | Available Amount | Action |
|---|---|---|---|---|---|---|---|---|---|
| 10 | Description: Demo Service HW<br>Part Number: - | 100,000.00 | 1.00 | Lite | | 0.00 | 1.00 | 99,999.00 | |



# Create Service Entry Sheets

3. Select SES items from catalog
   - Enter Supplier Start and End Date (click on Calendar) – date range services are provided
   - Click Search Catalog

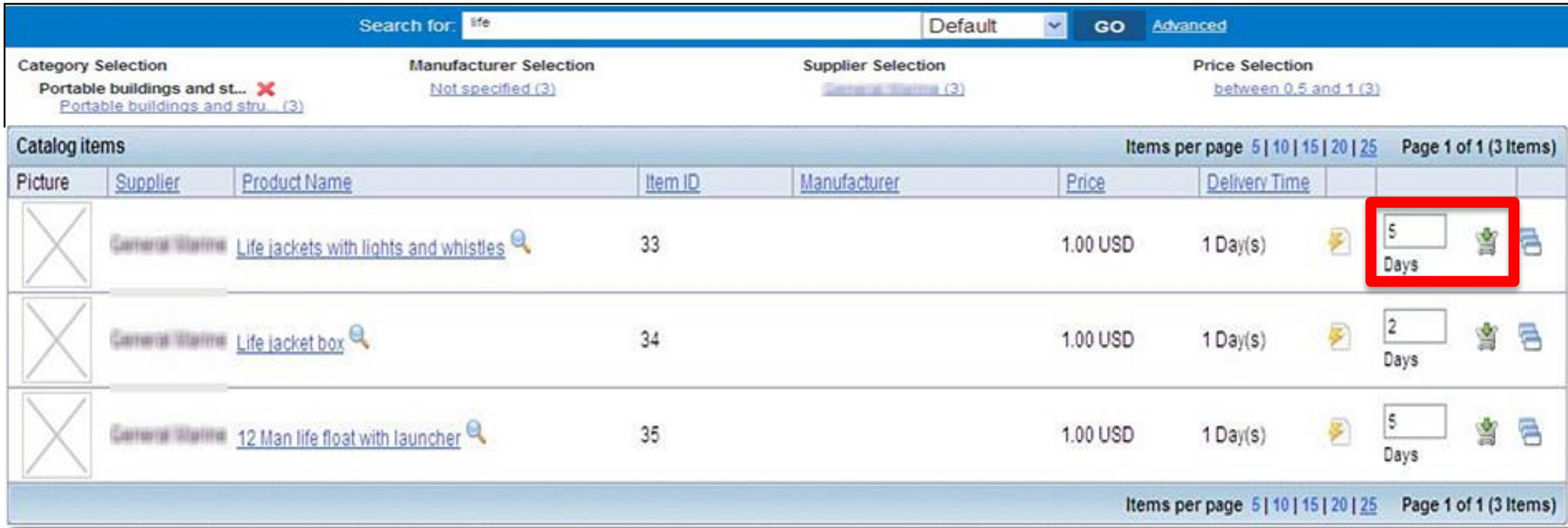


# Create Service Entry Sheets

- Select item(s) from the ‘Category Selection” or use Search function

# Create Service Entry Sheets

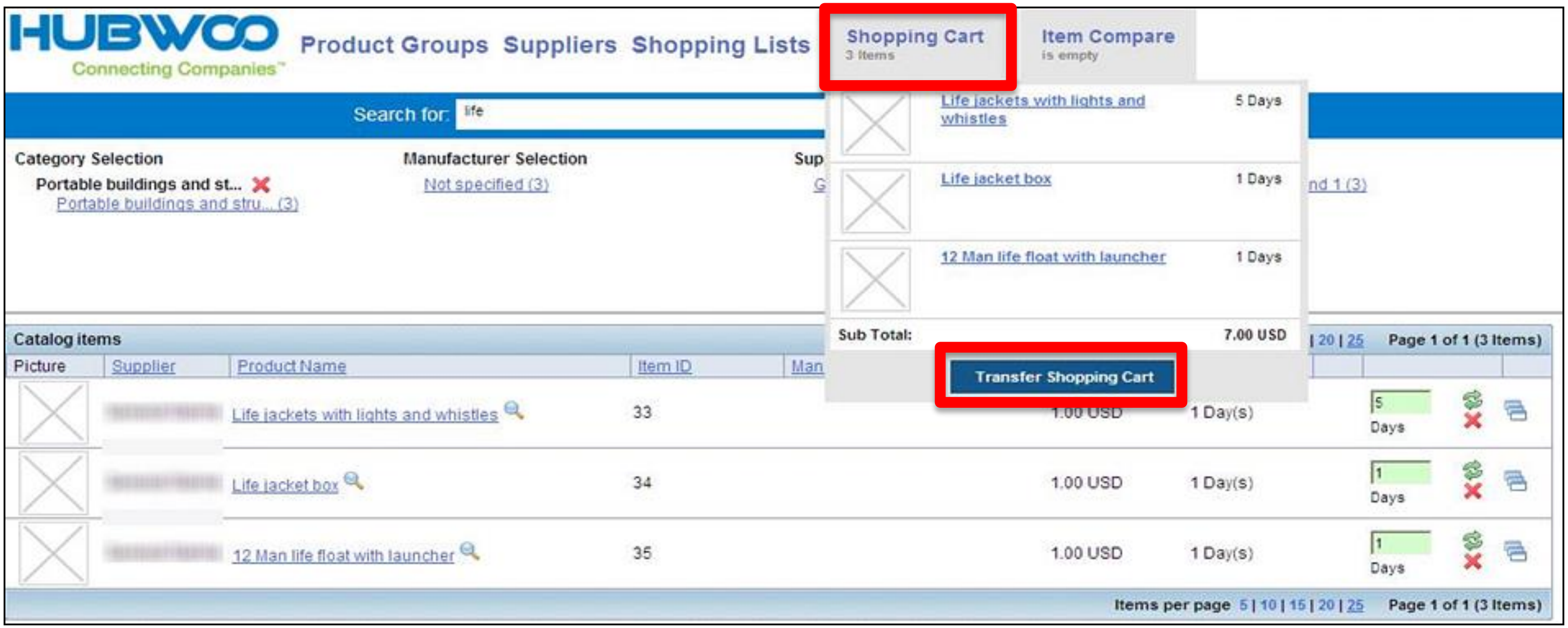
- Enter item Quantity and click 'Add to Cart'
- Do not enter fractional quantity at this point, see previous slide.




- Use "Misc Services" primarily for tax, transportation and miscellaneous 3rd party charges
- Use "Misc Goods" for minor items associated with primary goods/services acquired
- If item is missing in the catalog or price is incorrect, please contact your buyer

# Create Service Entry Sheets

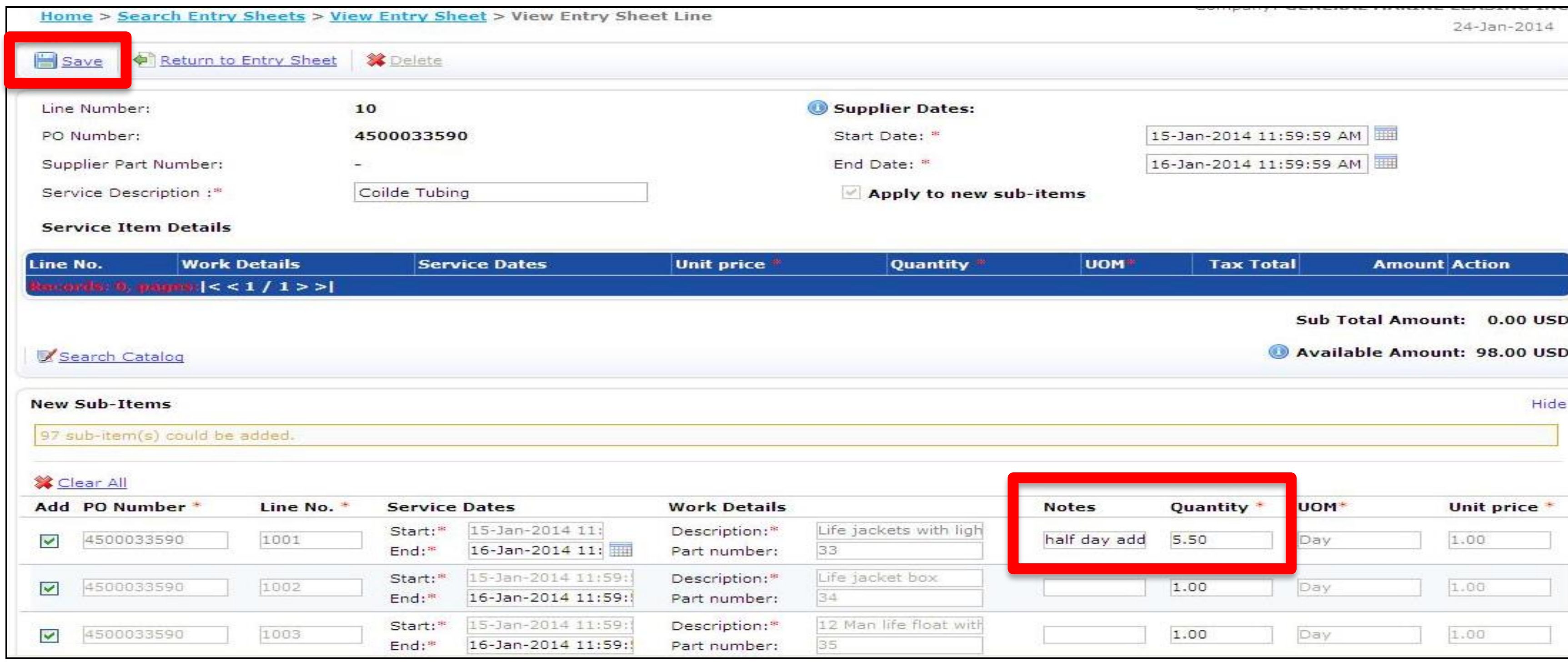
- When done entering all invoice items, hover mouse to 'Shopping Cart'
- Validate Sub Total Amount is correct
- Click 'Transfer Shopping Cart'




***Note:*** User can create shopping lists to create favorites for future use, especially if the same service is provided for multiple PO's within months. For more details see section *Shopping Lists*

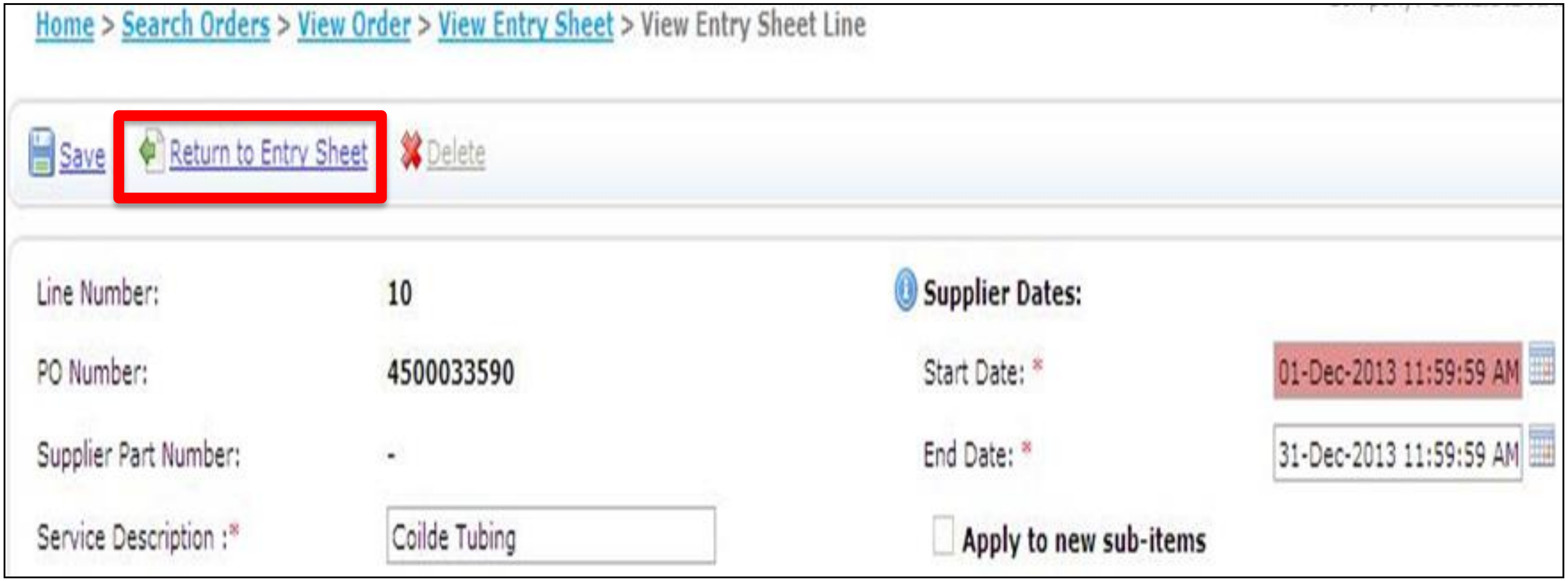
# Create Service Entry Sheets

- Validate line items, enter item notes, and change quantity if necessary
- Limit fractional quantity to 2 decimal places
- Click Save



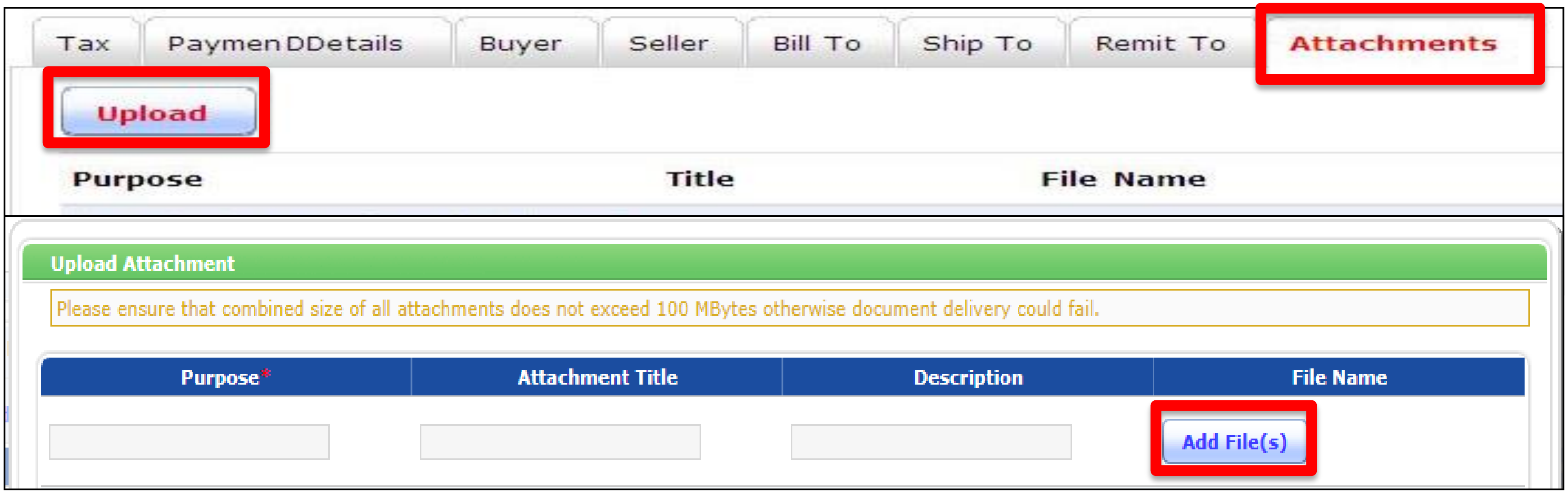
# Create Service Entry Sheets

- Click Return to Entry Sheet



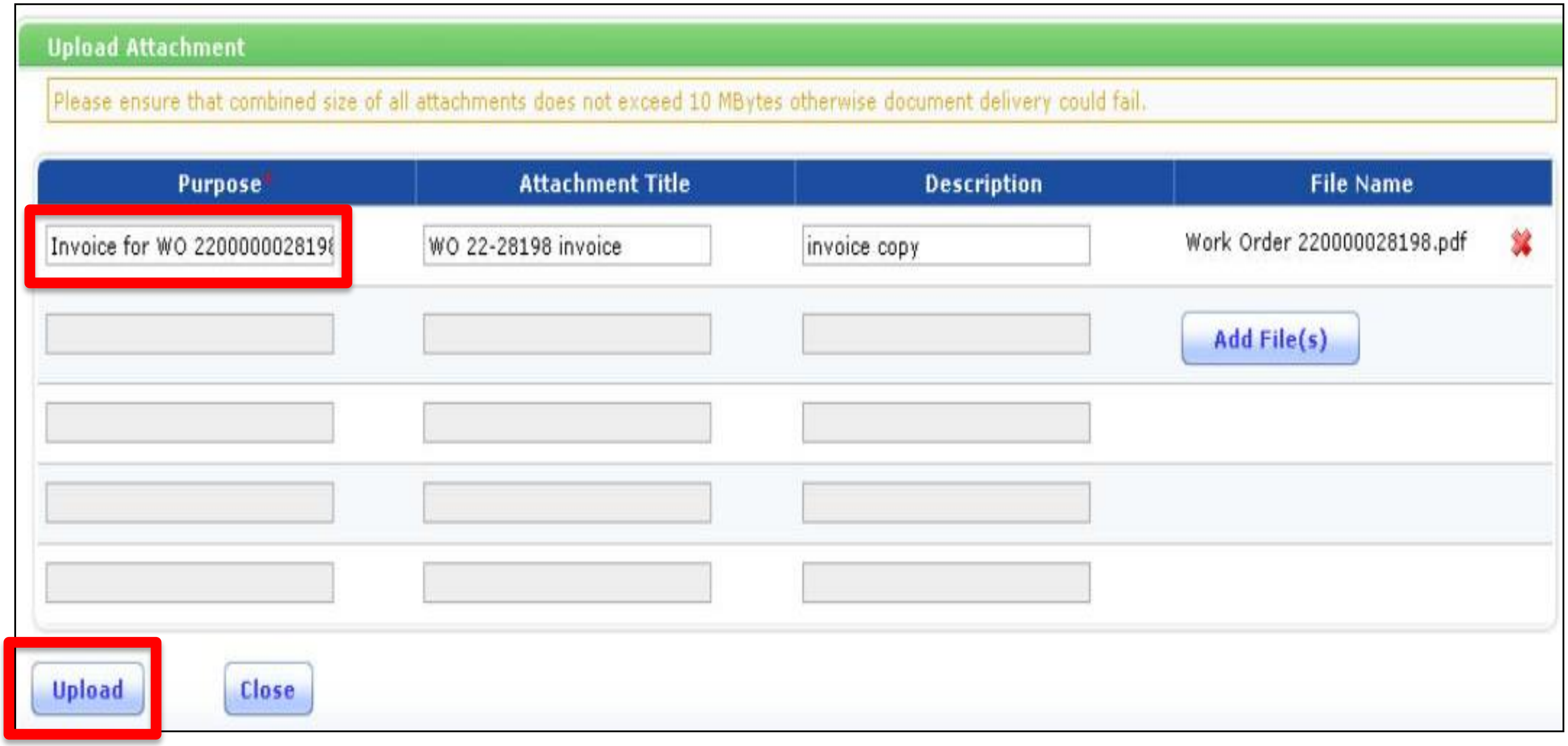
# Create Service Entry Sheets

4. Attach Invoice and supporting documents
   - Click “Attachments” tab. Limit of attachment size is 25MB
   - Click “Upload”
   - Click “Add File(s)”

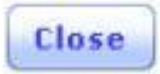


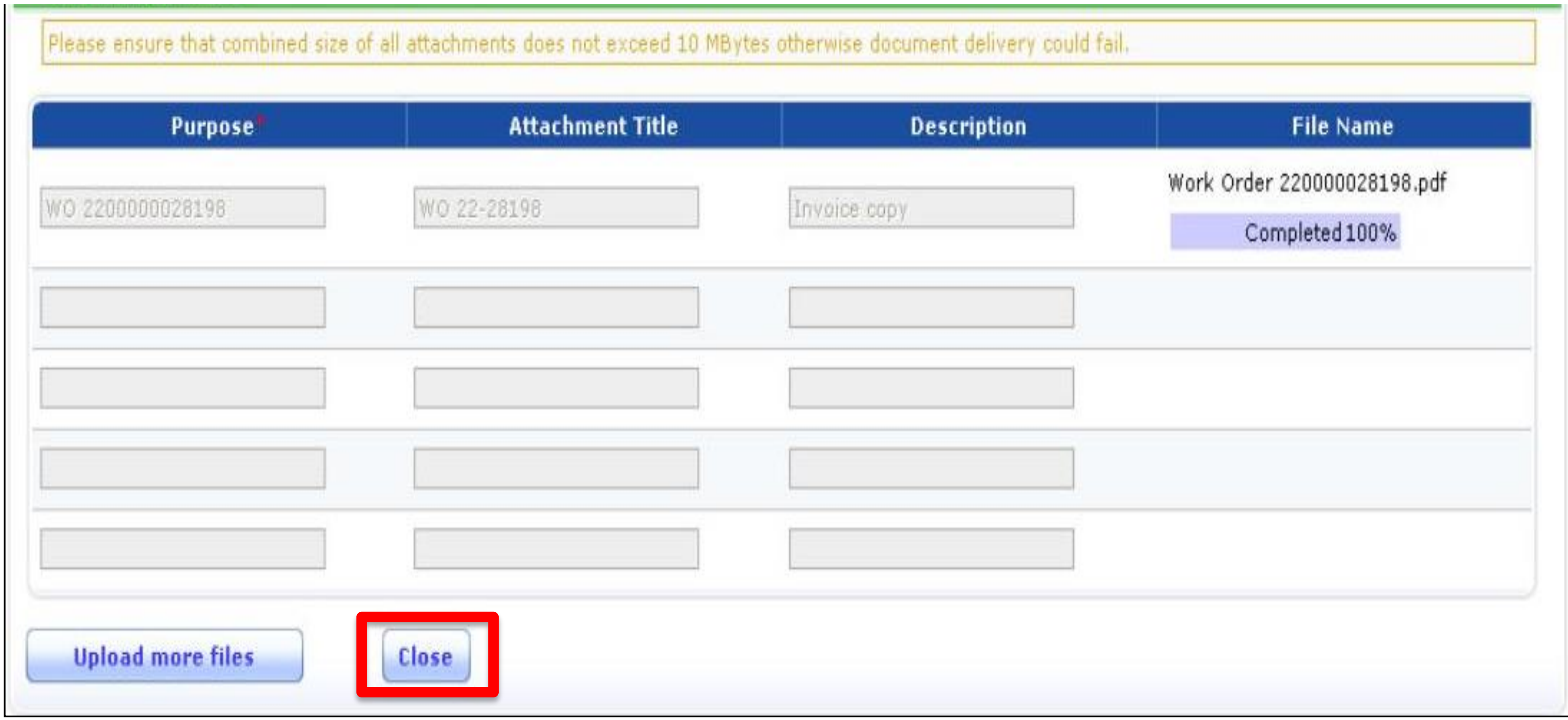
# Create Service Entry Sheets

- Enter text in “Purpose” field
- Click Upload



# Create Service Entry Sheets

- Click 

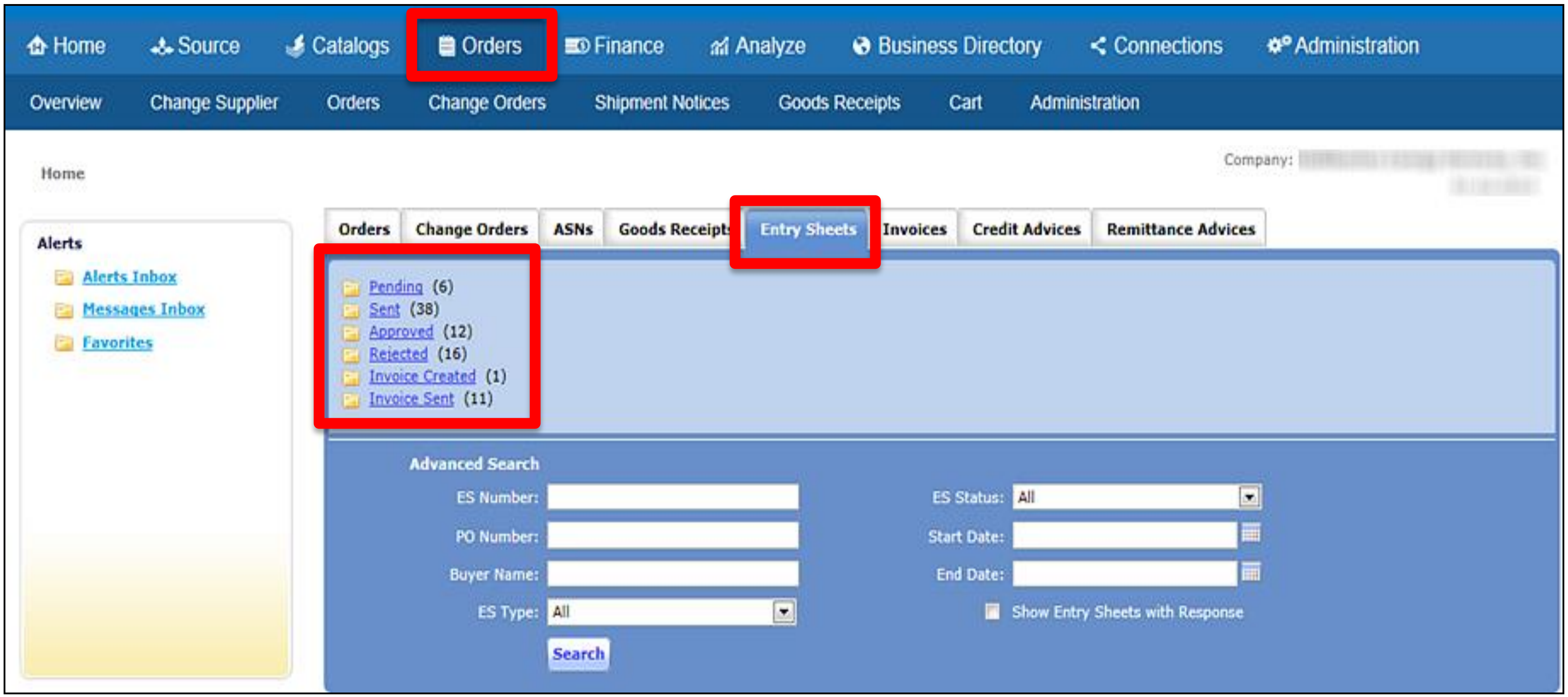
# Create Service Entry Sheets

5. Click Save and Send

# Create Service Entry Sheets

6. Check SES status
   - Click ‘Entry Sheets’ tab
   - SES are grouped per status



# Check Service Entry Sheets Statuses

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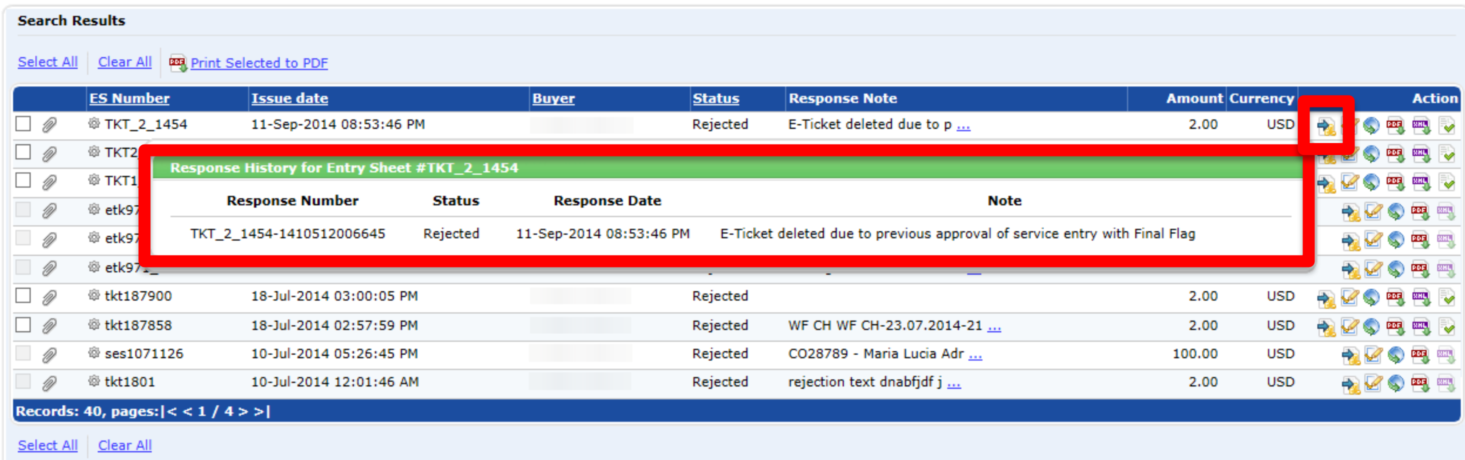
- In case of rejection, the reason is displayed on the Response Note column and when clicking on “ES response history”



**Search Results**

Select All | Clear All | Print Selected to PDF

| ES Number | Issue date | Buyer | Status | Response Note | Amount | Currency | Action |
|---|---|---|---|---|---|---|---|
| TKT_2_1454 | 11-Sep-2014 08:53:46 PM | | Rejected | E-Ticket deleted due to p ... | 2.00 | USD | |
| TKT2 | | | | | | | |
| TKT1 | | | | | | | |
| etk97 | | | | | | | |
| etk97 | | | | | | | |
| etk97_ | | | | | | | |
| tkt187900 | 18-Jul-2014 03:00:05 PM | | Rejected | | 2.00 | USD | |
| tkt187858 | 18-Jul-2014 02:57:59 PM | | Rejected | WF CH WF CH-23.07.2014-21 ... | 2.00 | USD | |
| ses1071126 | 10-Jul-2014 05:26:45 PM | | Rejected | CO28789 - Maria Lucia Adr ... | 100.00 | USD | |
| tkt1801 | 10-Jul-2014 12:01:46 AM | | Rejected | rejection text dnabfjdf j ... | 2.00 | USD | |

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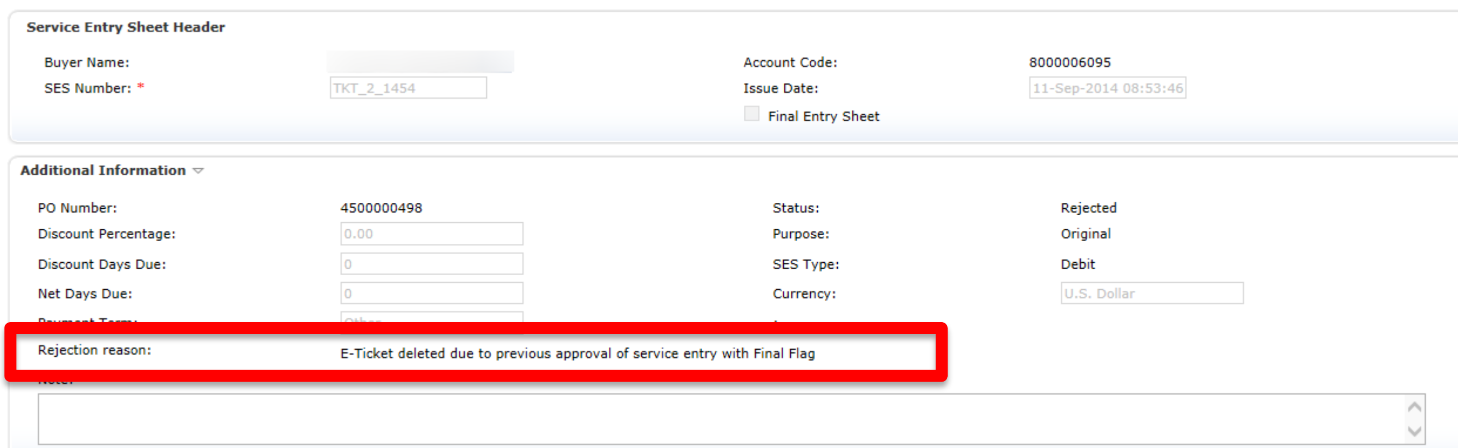
Select All | Clear All

**Response History for Entry Sheet #TKT_2_1454**

| Response Number | Status | Response Date | Note |
|---|---|---|---|
| TKT_2_1454-1410512006645 | Rejected | 11-Sep-2014 08:53:46 PM | E-Ticket deleted due to previous approval of service entry with Final Flag |

- It’s also available in the SES details



# Highlights of this chapter

- SES – Service Entry Sheet
  - Detail of services provided
  - Supporting documentation scanned into system & attached to SES in Hubwoo
  - Created and submitted by supplier in Hubwoo for routing to Buyer contract manager who will review, confirm & approve services provided
- SES Number
  - Same as  your internal field ticket number
- SES Issue Date
  - Same as  your internal field ticket date
- SES Supplier Start and End Date
  - Range of date services are provided

# Points to remember on SES

- Submit SES after services/goods are delivered
- SES Number = internal field ticket number
- Issue Date = internal field ticket issue date
- If the SES you are entering will be the last one related to the scope of work covered by the particular PO, please mark as “Final Entry Sheet” (checkbox in SES screen, see slide).
- Catalog Price list is based on the price list contained in the contract
    - If item is not in the catalog or price is not correct, contact Buyer Support (reference Slide 50 for contact details)
- For some buyers tax needs to be entered under ‘Misc Services’ or ‘Tax’ item in the catalog price list and not using ‘TAX’ tab. (Contact Buyer Support)

# Points to remember on SES

- Your internally created “paper” invoice must match the Hubwoo SES total amount. There is no tolerance amount in the system.
  - When rounding issue occurs, enter the balance amount as ‘Misc Services’ or ‘Misc Goods’
  - To avoid rounding issue, the preferred method is to round the quantity to 2 decimal places.
  - If your internally created “paper” invoice does not match the approved SES amount, the SES and Invoice will be rejected.
- If SES is rejected, rejection reason is available in the SES details (Additional Information)
- Submit only SES linked to only one PO item, or else it will be automatically rejected.

# Points to remember on SES

- You may enter multiple SES's per PO with the following conditions:
  - "1" SES = "1" Invoice - Each SES entered against a PO must be converted to an Invoice and the supplier internally generated invoice must be attached and match the SES for each one.
  - Sufficient funds remain on the PO to cover the additional SES. The supplier has the ability to see the remaining funds for a PO in Hubwoo. Therefore, if you want to process an SES for $100 but only $75 remains on the PO, the SES should not be submitted as it will not be processed.  In this case, please contact your Buyer representative so that an additional PO can be issued.
- Supplier comment/Note can be entered "Additional Information", "Note" section.

# Points to Remember on SES

- **Depending on buyer requirement, the supplier might** have to accept PO issued by buyer **before** creating the SES
- The SES is approved or rejected by the buyer
  - If approved, the supplier can then create an invoice from the SES
  - If rejected, the supplier must create another (corrected) SES
    - Rejection reason is available to the supplier
- **DO NOT** submit hard copy invoices for work authorized via a PO created & accepted in Hubwoo; the invoice created will be electronic based on the approved SES. Supplier internally created "paper" invoice will be uploaded into Hubwoo upon converting the SES to an electronic invoice.

# Invoicing

# Submit Invoice

## 3-step process

1. Accept or Reject the Purchase Order
2. Create Service Entry Sheet (SES)
3. **Submit e-invoice**

# Quick Steps – Submit Invoice

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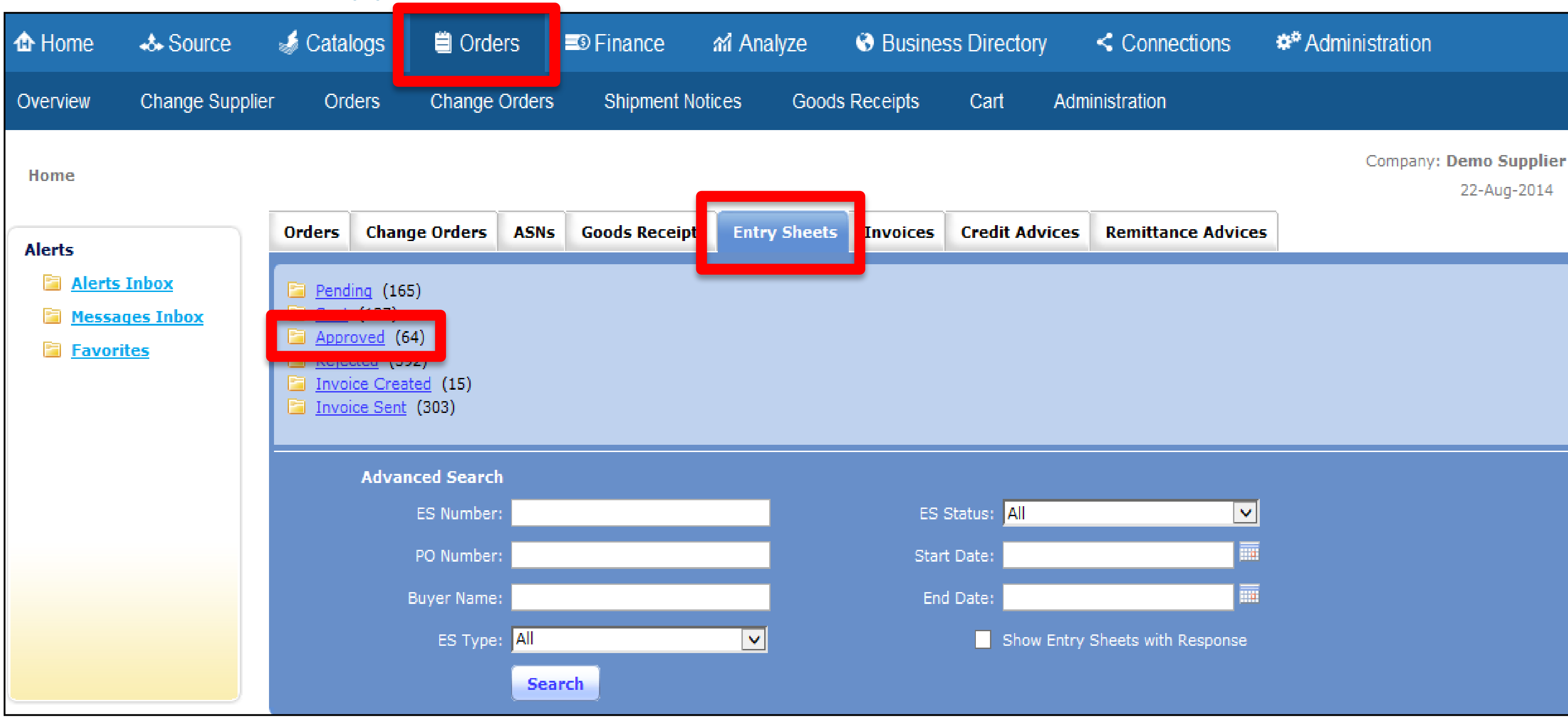
1. Open Approved SES
2. Enter Invoice Number
3. Attach invoice copy
4. Click Save and Send
5. Check Invoice Status

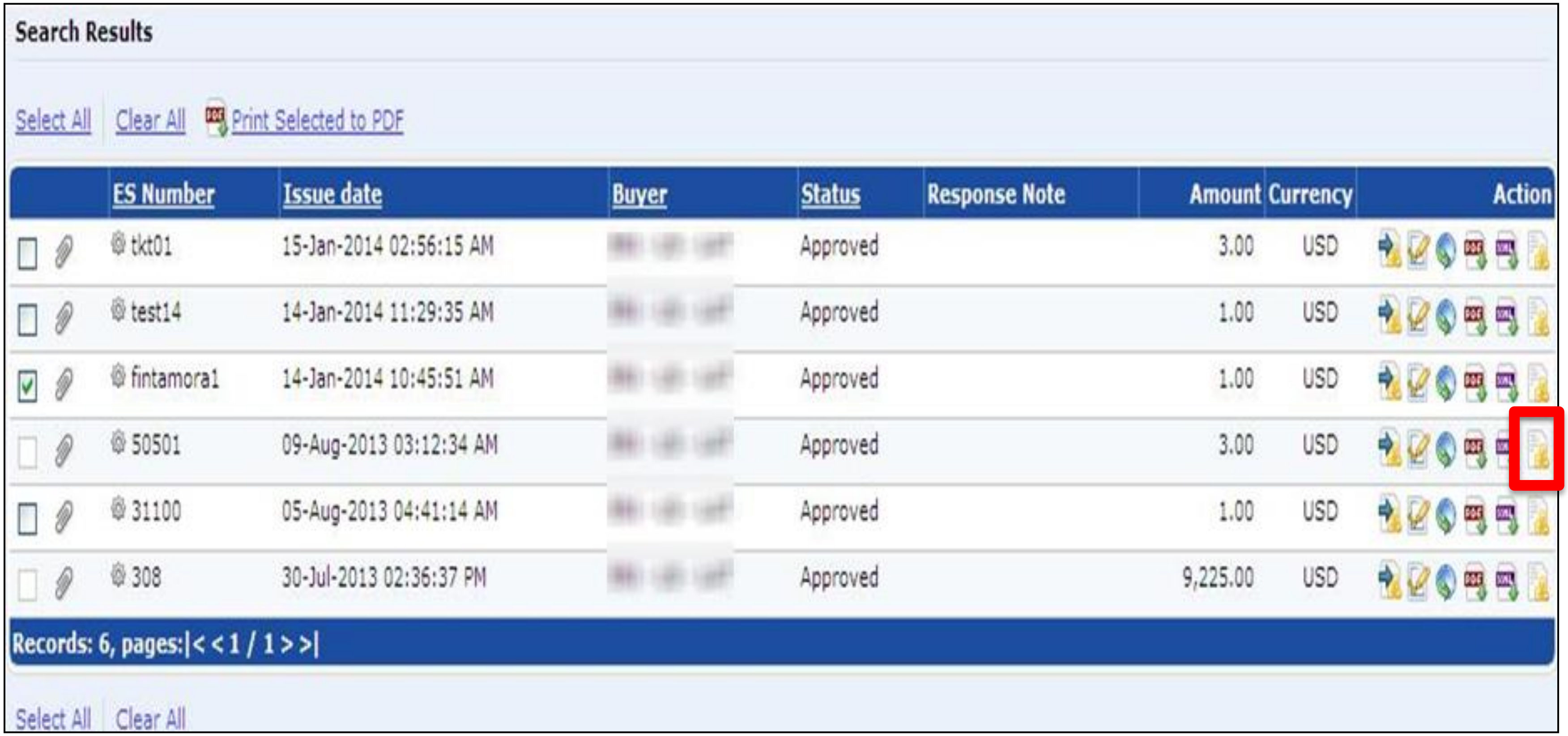
# Submit Invoice

1. Open Approved SES
   - Click 'Entry Sheets' tab
   - Click 'Approved' folder



# Submit Invoice

- Click ‘Create Invoice from ES’



Search Results

Select All | Clear All | Print Selected to PDF

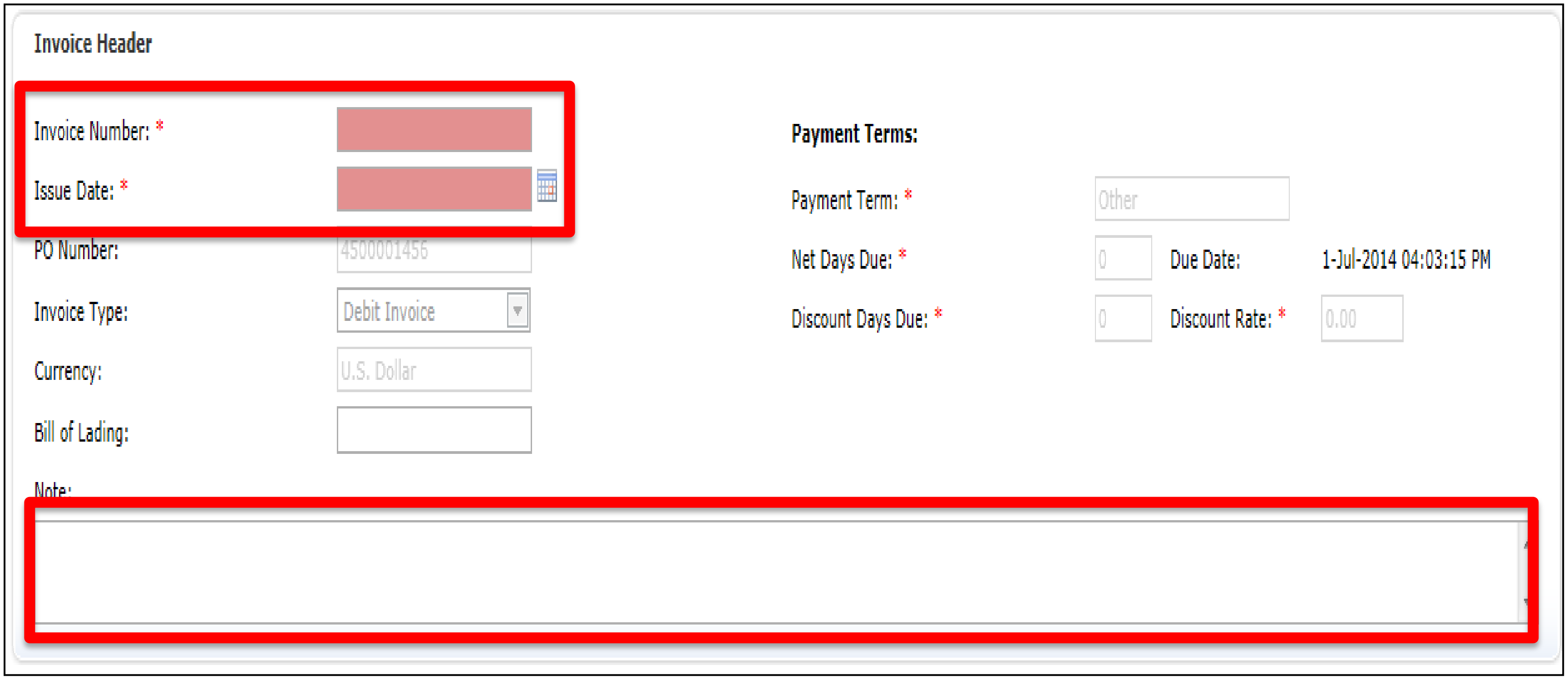
| | ES Number | Issue date | Buyer | Status | Response Note | Amount | Currency | Action |
|---|---|---|---|---|---|---|---|---|
| | tkt01 | 15-Jan-2014 02:56:15 AM | [illegible] | Approved | | 3.00 | USD | |
| | test14 | 14-Jan-2014 11:29:35 AM | [illegible] | Approved | | 1.00 | USD | |
| | fintamora1 | 14-Jan-2014 10:45:51 AM | [illegible] | Approved | | 1.00 | USD | |
| | 50501 | 09-Aug-2013 03:12:34 AM | [illegible] | Approved | | 3.00 | USD | |
| | 31100 | 05-Aug-2013 04:41:14 AM | [illegible] | Approved | | 1.00 | USD | |
| | 308 | 30-Jul-2013 02:36:37 PM | [illegible] | Approved | | 9,225.00 | USD | |

Records: 6, pages:|< < 1 / 1 > >|

Select All | Clear All

# Submit Invoice

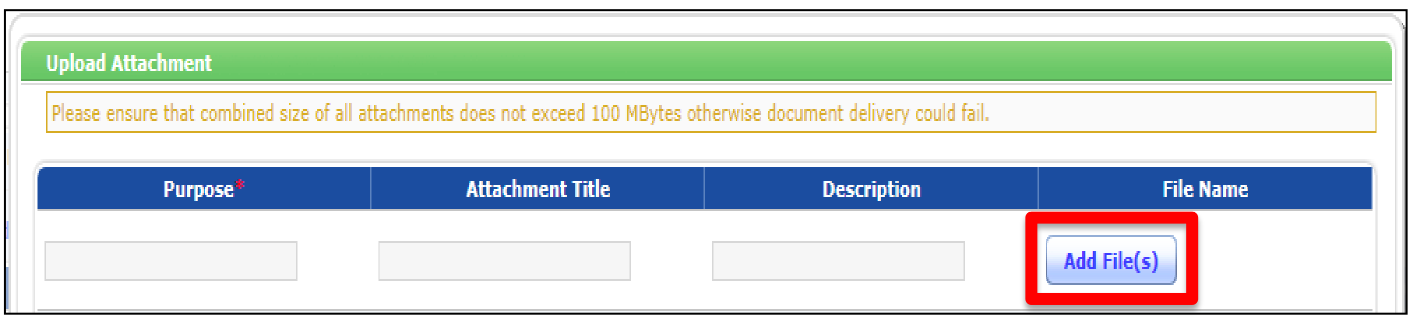
2. Enter Invoice number and Issue Date
   - Issue Date must be entered
   - “Note” field can be use to submit comment back to your Buyer.



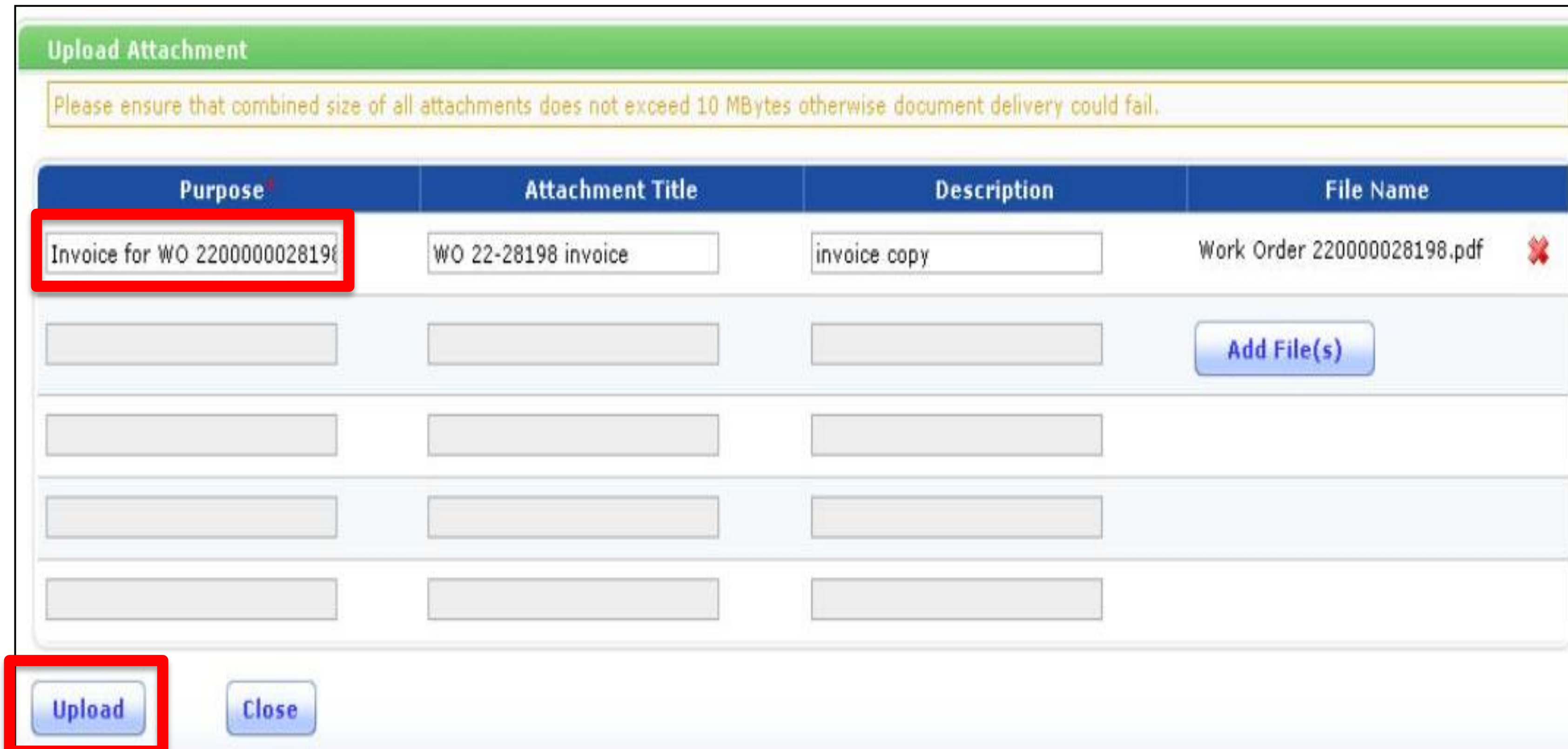
# Quick Steps – Submit Invoice

2. Attach Invoice copy
   - Click ‘Attachments’ tab
   - Click ‘Upload’
   - Click ‘Add Files’

# Quick Steps – Submit Invoice

- Enter ‘Purpose’ text description
- Click 

# Quick Steps – Submit Invoice

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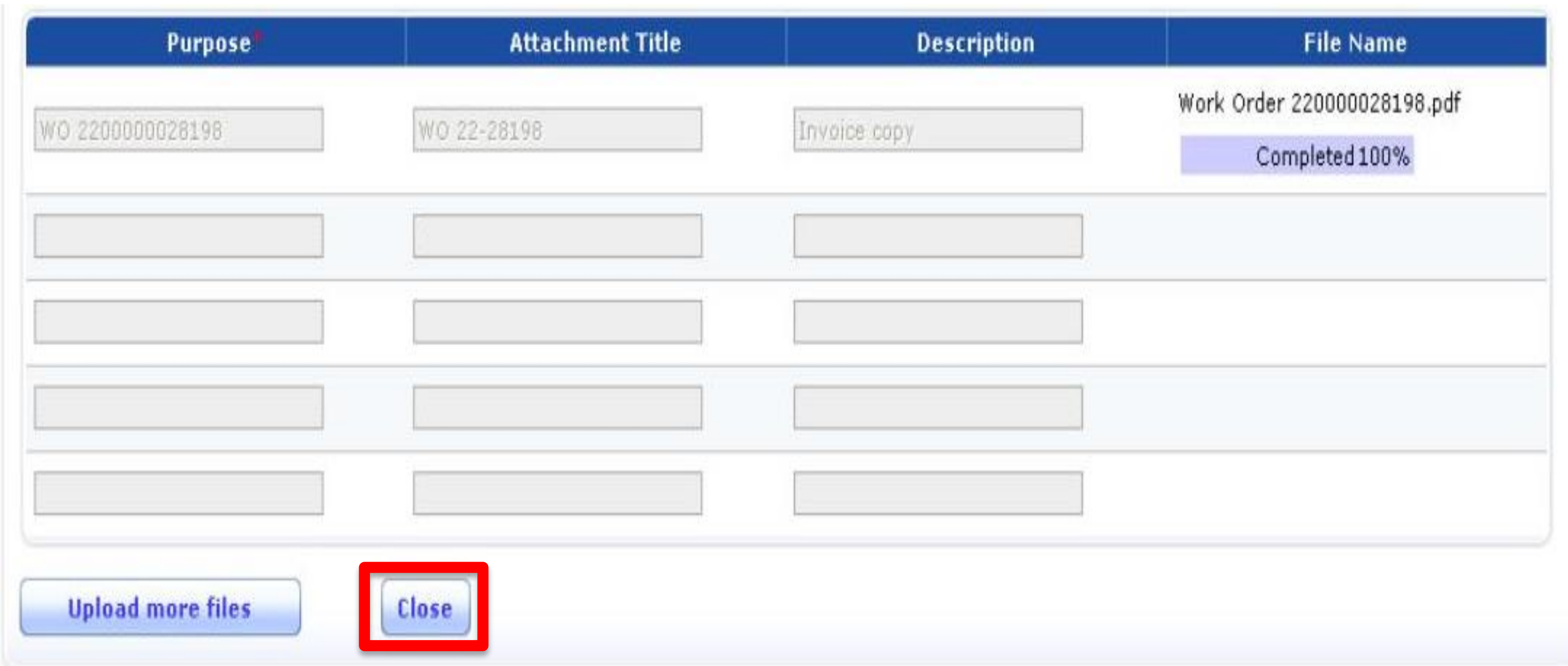
- Click Close

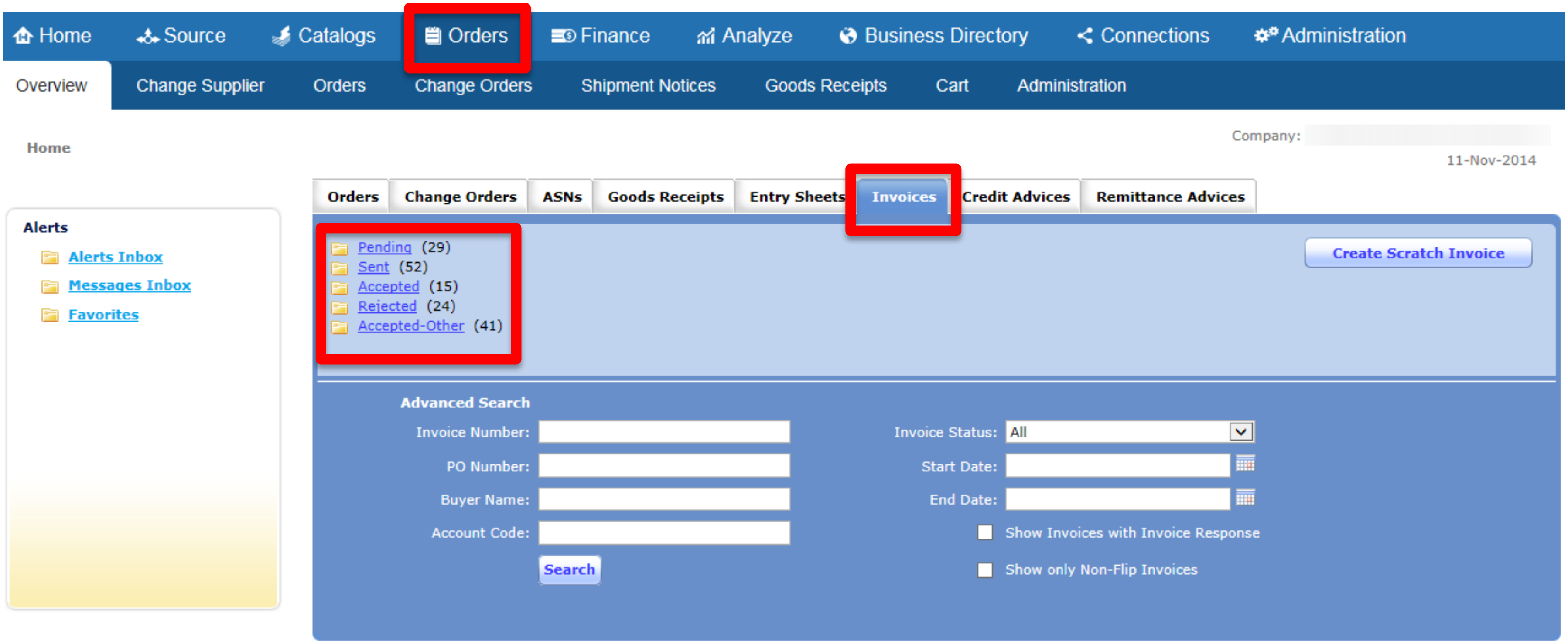


# Quick Steps – Submit Invoice

3. Click Save and Send

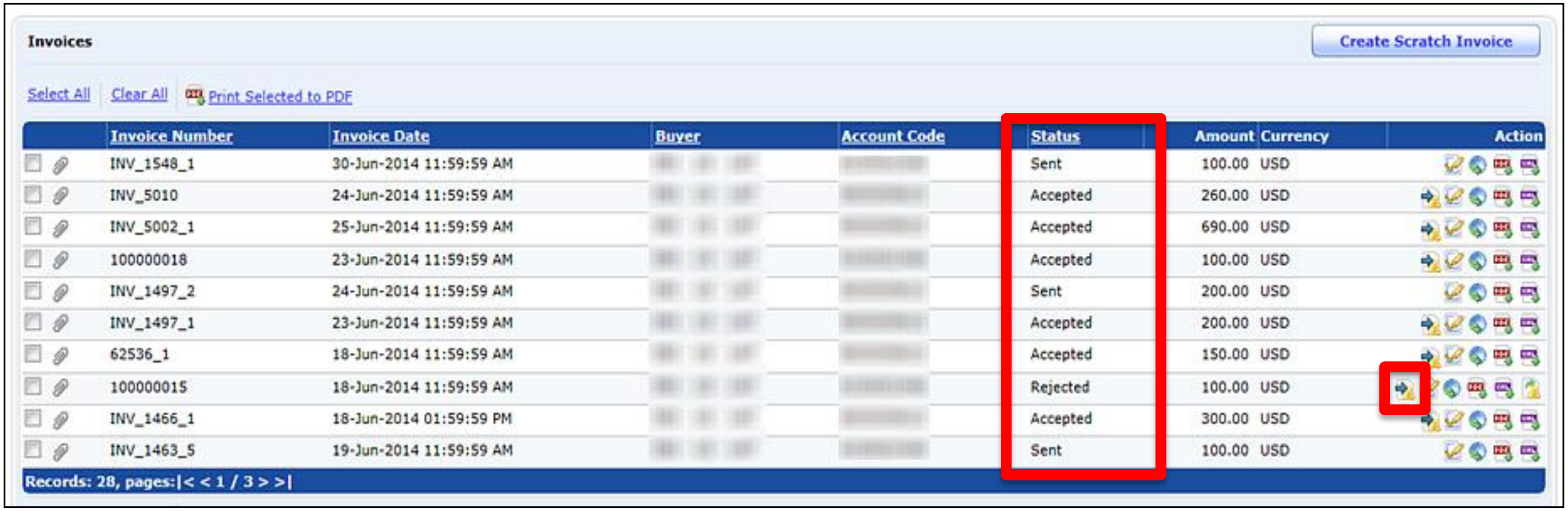
# Quick Steps – Submit Invoice

4. Check Invoice status
   - Click ‘Invoices’ tab
   - Invoices are grouped per status



# Quick Steps – Submit Invoice

- Status is updated according to Buyer approval steps and rejection reason can be displayed clicking on "Show Invoice response history"



Invoices

Create Scratch Invoice

Select All | Clear All | Print Selected to PDF

| Invoice Number | Invoice Date | Buyer | Account Code | Status | Amount | Currency | Action |
|---|---|---|---|---|---|---|---|
| INV_1548_1 | 30-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Sent | 100.00 | USD | |
| INV_5010 | 24-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Accepted | 260.00 | USD | |
| INV_5002_1 | 25-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Accepted | 690.00 | USD | |
| 100000018 | 23-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Accepted | 100.00 | USD | |
| INV_1497_2 | 24-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Sent | 200.00 | USD | |
| INV_1497_1 | 23-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Accepted | 200.00 | USD | |
| 62536_1 | 18-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Accepted | 150.00 | USD | |
| 100000015 | 18-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Rejected | 100.00 | USD | |
| INV_1466_1 | 18-Jun-2014 01:59:59 PM | [illegible] | [illegible] | Accepted | 300.00 | USD | |
| INV_1463_5 | 19-Jun-2014 11:59:59 AM | [illegible] | [illegible] | Sent | 100.00 | USD | |

Records: 28, pages:|< < 1 / 3 > >|

- It's also available in the Invoice details

Invoice Response

| | | | |
|---|---|---|---|
| Invoice Response Status: | Rejected | Invoice Response Number: | 100000015-1403198251281 |
| Invoice Response Note: | nota reject invoice da wf CO28206 - Elena Rossi 19.06.2014 - 19:17 | Invoice Response Date: | 18-Jun-2014 11:59:59 AM |

# Points to Remember on Order Management

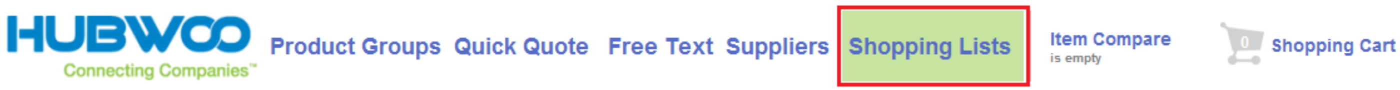
- Hubwoo works with Internet Explorer browser **ONLY**
- **Notifications in Hubwoo** - By default, all notification flags are "enabled" for every vendor. If you should want to "disable" any of these notifications, please contact the **Hubwoo Customer Care** for assistance (reference slide for contact details)

# Points to remember on Invoice

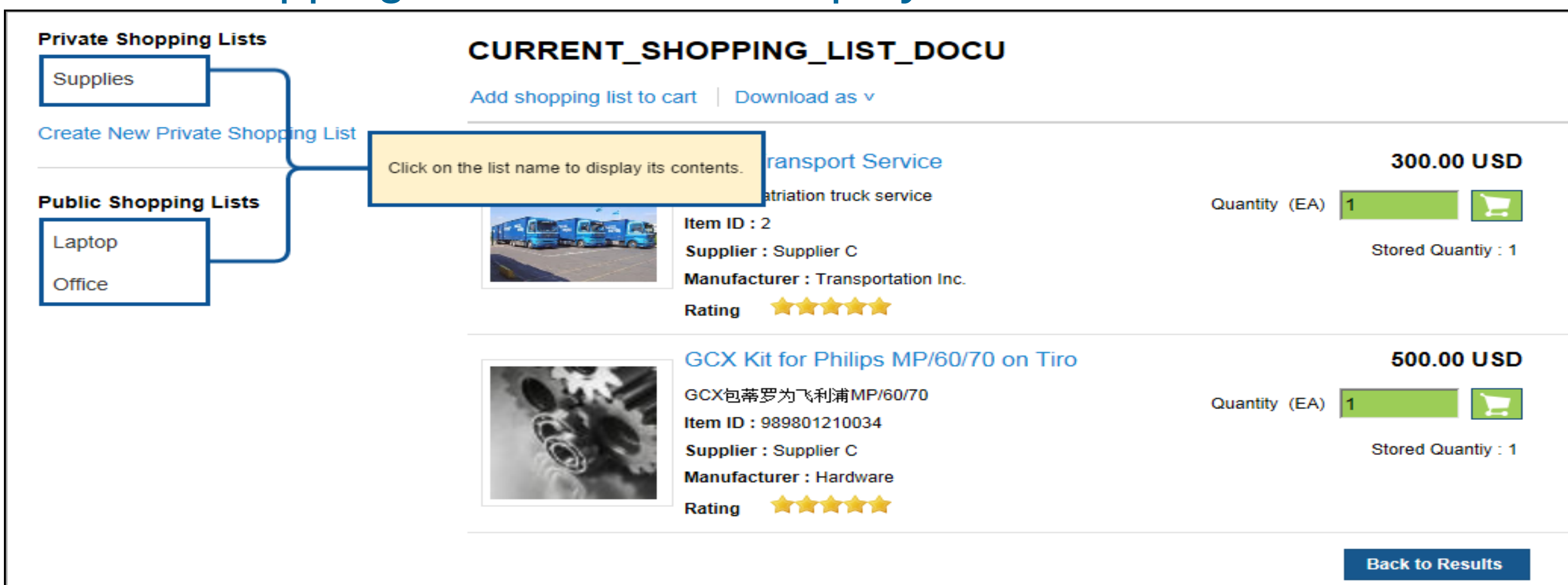
- Invoice Number is your internal field ticket number and **must be unique**
- Hubwoo invoice number and amount should match with the attached copy of the paper invoice.
- Invoice Issue date must be entered when creating the invoice.
- Pdf file name should not contain character '#'.
- Invoice is electronically received & approved by buyer Accounts Payable
- Invoice status will change to "Accepted" when approved
- Contact Buyer Accounts Payable if Invoice is "rejected"

# Shopping Lists

- Shopping lists enable you to save shopping carts for future purchases. Using shopping lists will help you to easily re-order items which had been previously ordered.
- Click Shopping List from the main menu to display your shopping lists.




- The Shopping Lists screen is displayed.

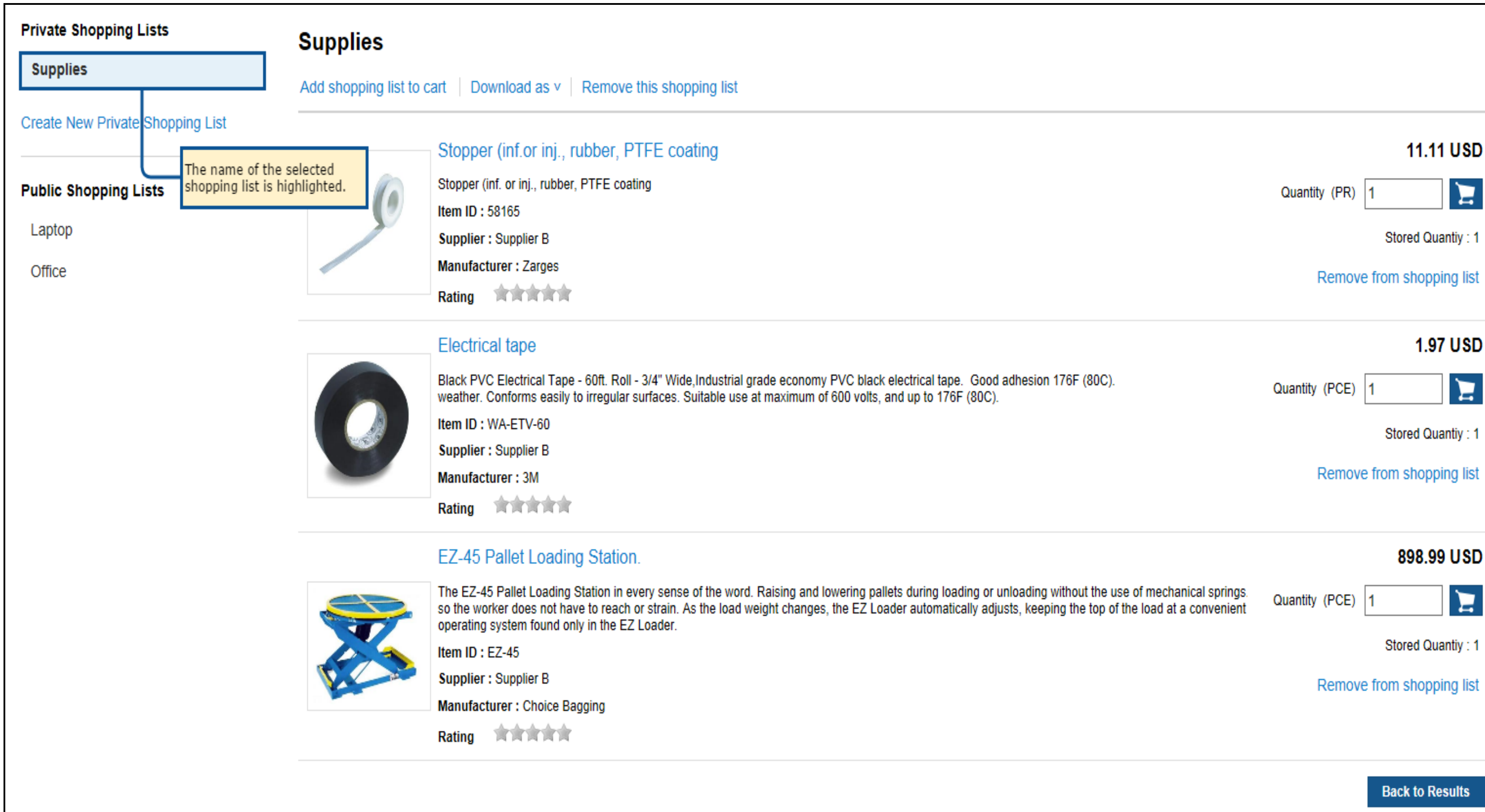


- On the previous screen you should have seen a list of Private Shopping Lists (shopping lists created by you), and a list of Public
- Shopping Lists (standard shopping lists available for every user).

- The following actions are available when working with Shopping Lists:

| Button | Action |
|---|---|
| Add shopping list to cart | Click on this link to add the list to the shopping cart. |
| Download as v | Select from the drop-down list to download the shopping list to an excel file or to a text file.<br>Excel file (.xls)<br>Text (.txt) |
| Create New Private Shopping List | Click on this link to create a new Private Shopping List. This feature allows you to upload shopping lists using a template. |
| Back to Results | Click to go back to the search results. |

- Selected shopping lists display at the bottom of the screen. The name of the selected shopping list is highlighted in the list.



# Creating Shopping Lists

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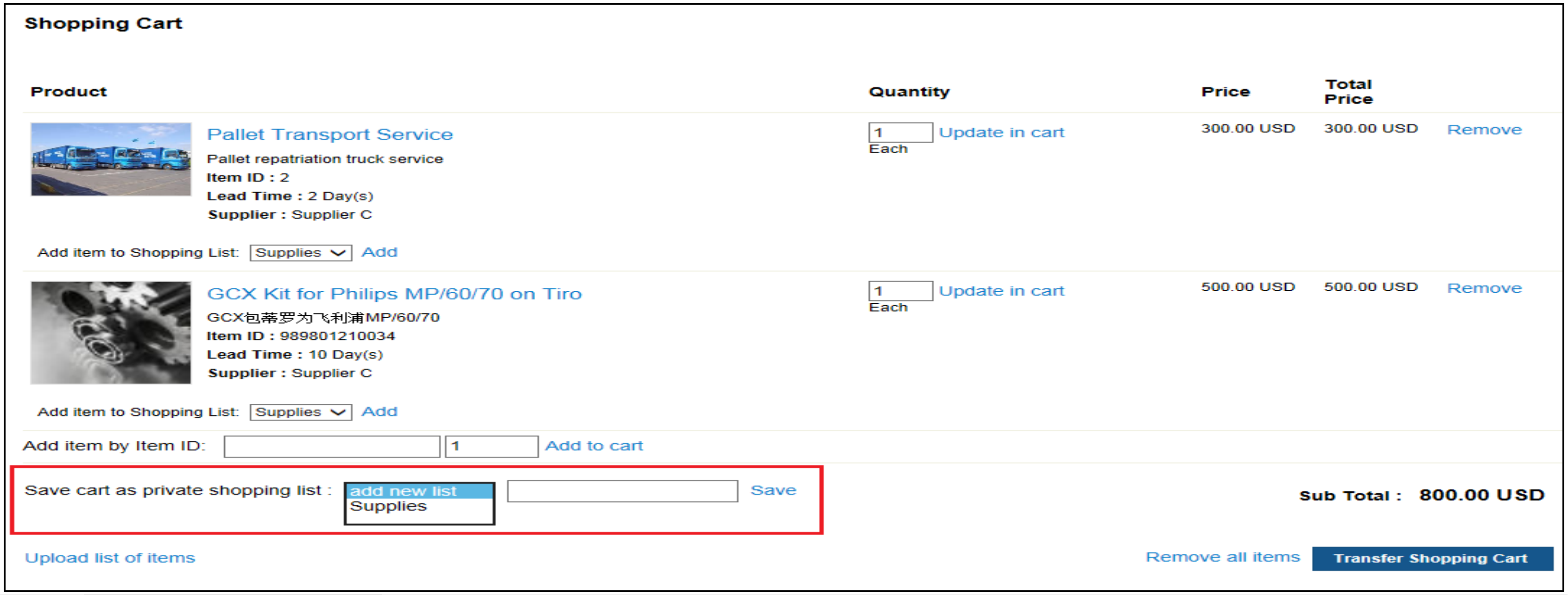
- To create a new shopping list:
  1. Search for one or more products to put in the list, and transfer them to the shopping cart.
  2. Go to the Shopping Cart.
  3. Select “add new list” from the drop-down list

     add new list
     Supplies
  4. Type a name in the section “Save cart as private shopping list:”
  5. Click on Save



- Private shopping lists are only visible to the user who created it.
- If the Shopping List contains items from punch-outs, these will not be saved to the shopping list and the following warning message will be displayed:

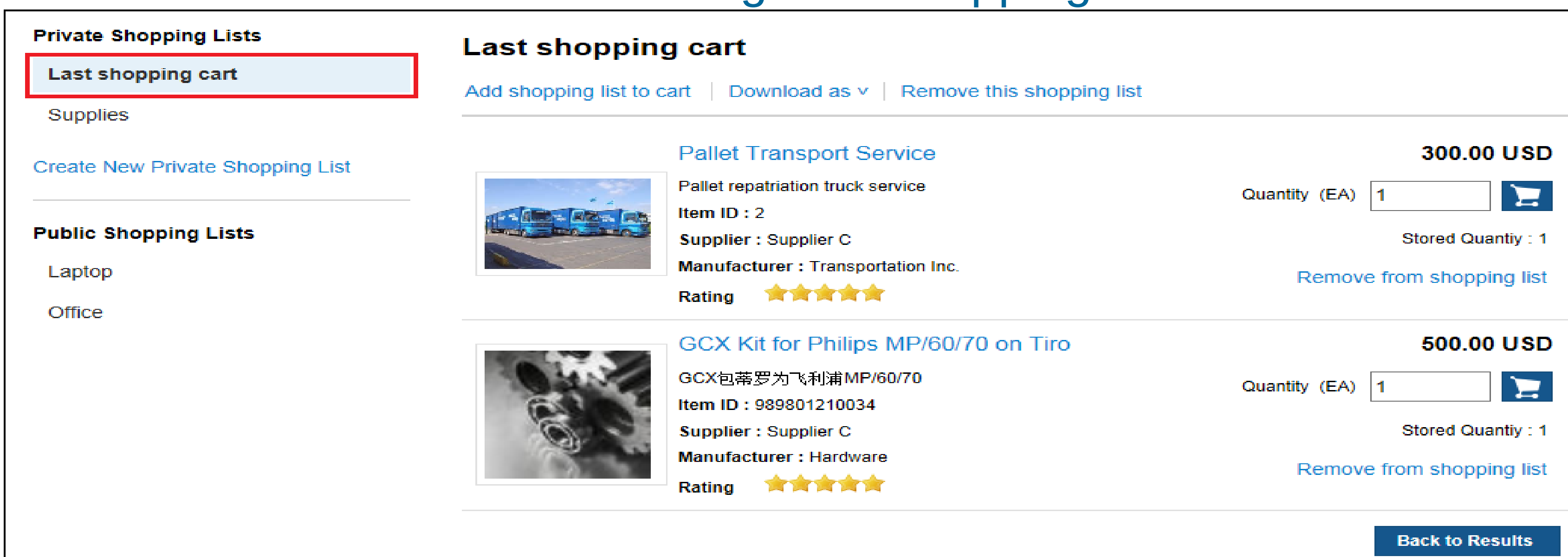
**Shopping Cart**

Please note: External Items (Punchout items) are not stored in shopping lists.

# Automatic Shopping List-Last Shopping Cart

- Automatic shopping list is created based on the last shopping cart that has been created and transferred.
- To access this feature click **Shopping Lists** from the main menu.


- The Shopping Lists screen opens displaying the **Last shopping cart** list. You can view/change the shopping list content.



- The following actions are available:

| Button | Action |
|---|---|
| Add shopping list to cart | Click on this link to add the list to the shopping cart. |
| Download as v | Select from the drop-down list to download the shopping list to an excel file or to a text file.<br>Excel file (.xls)<br>Text (.txt) |
| Remove this shopping list | Click on this link to remove the shopping list. |
| Create New Private Shopping List | Click on this link to create a new Private Shopping List. This feature allows you to upload shopping lists using a template. |
| Back to Results | Click to go back to the search results. |

- Automatic shopping list is also created if there are items in the shopping cart at the moment you click on “Cancel” from the main menu.

# Automatic Updates of Shopping Lists

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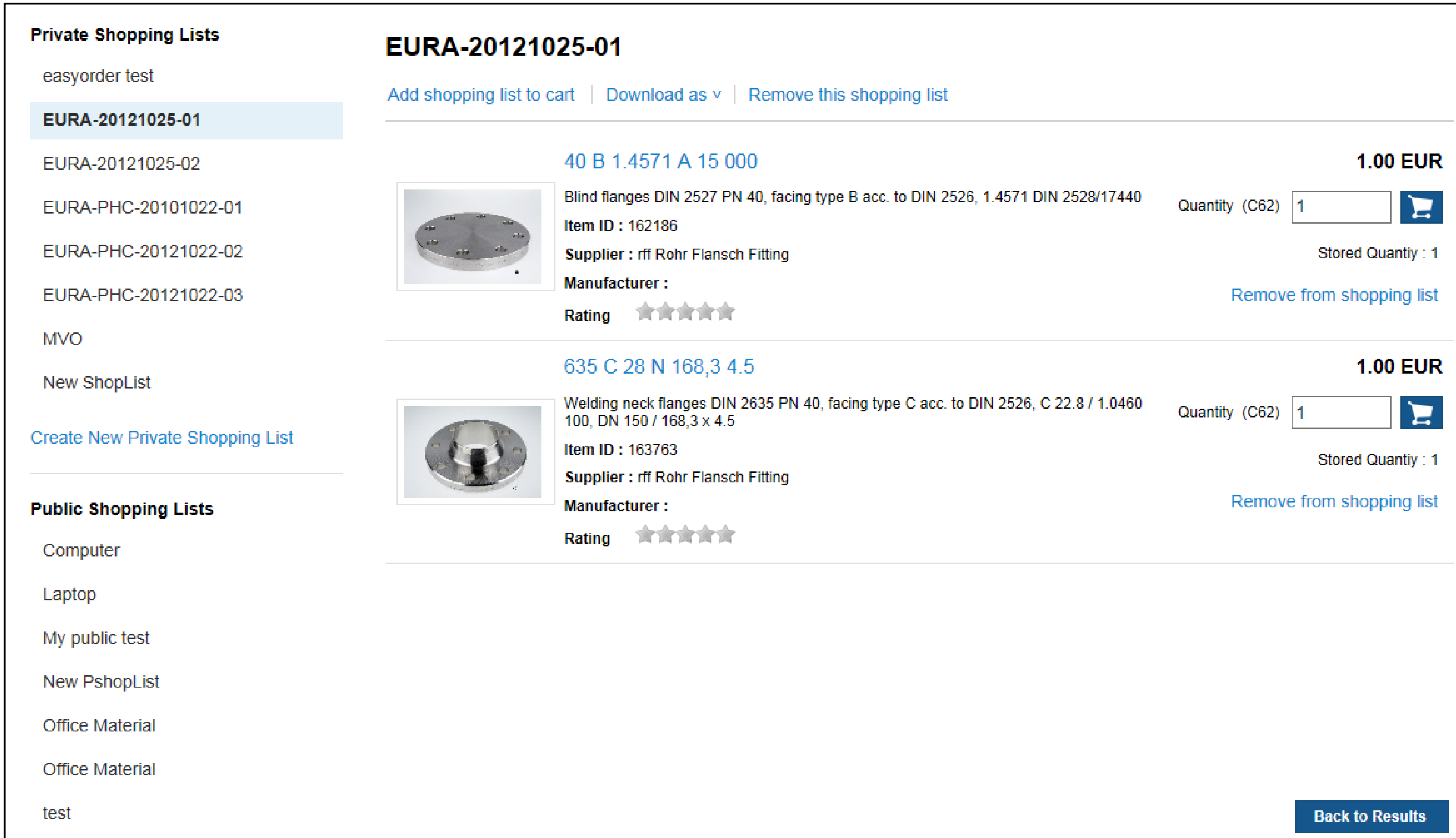
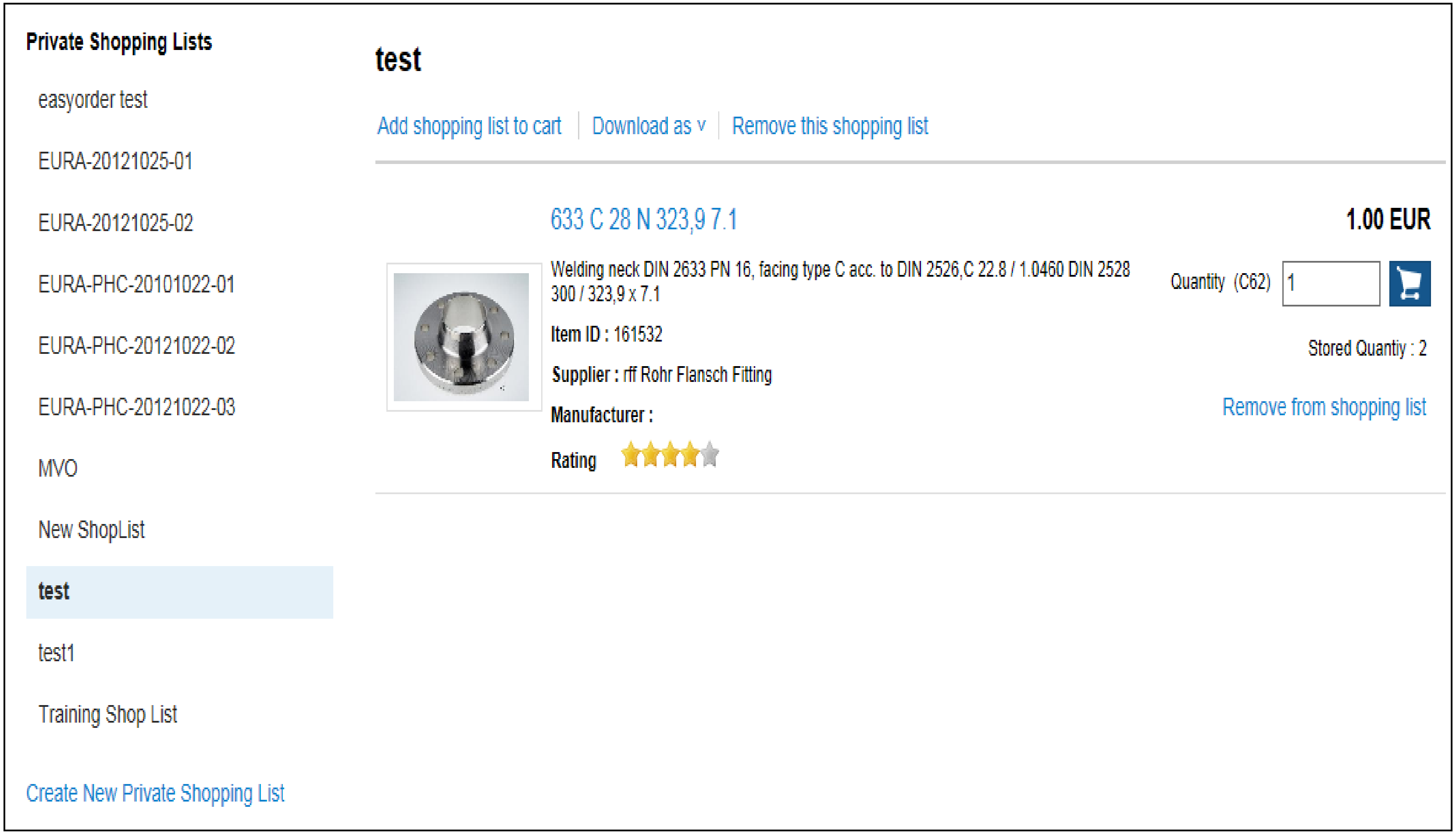
- The shopping lists are automatically updated after release of a new content catalog.

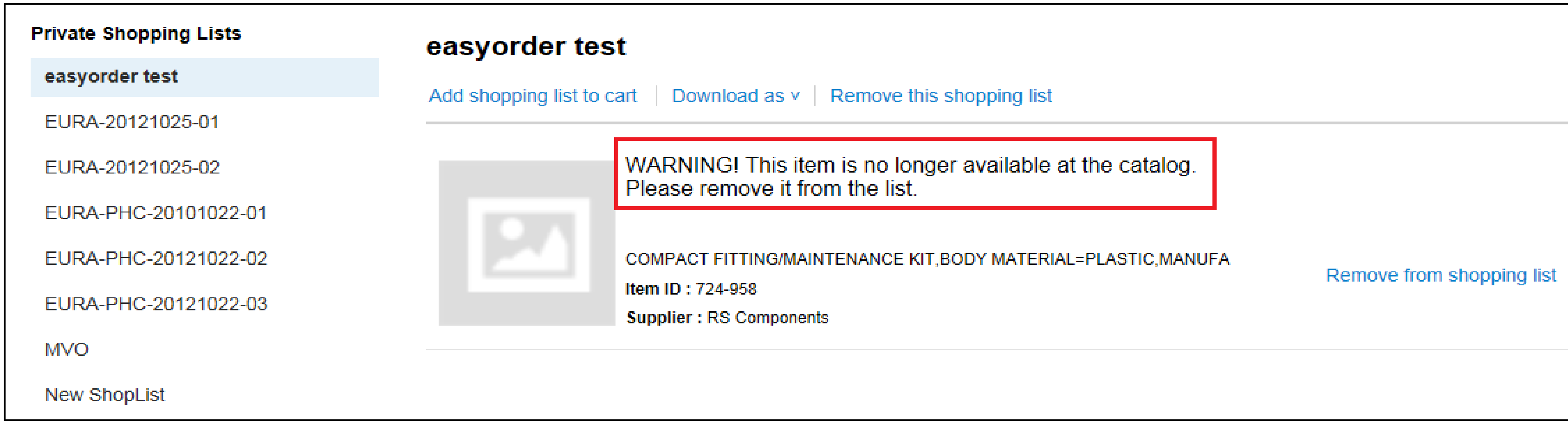


- Once the new catalog is released, the information on the shopping lists is automatically updated.

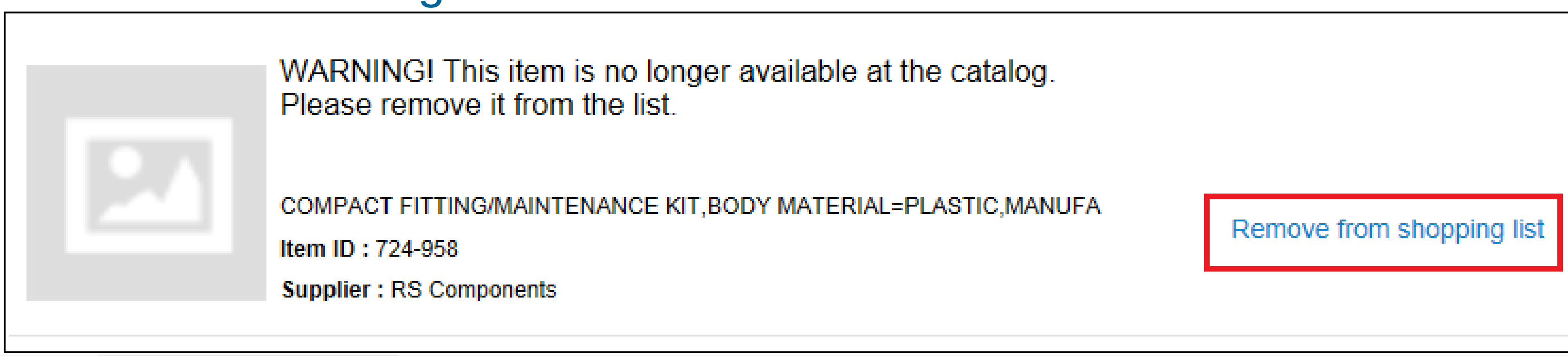


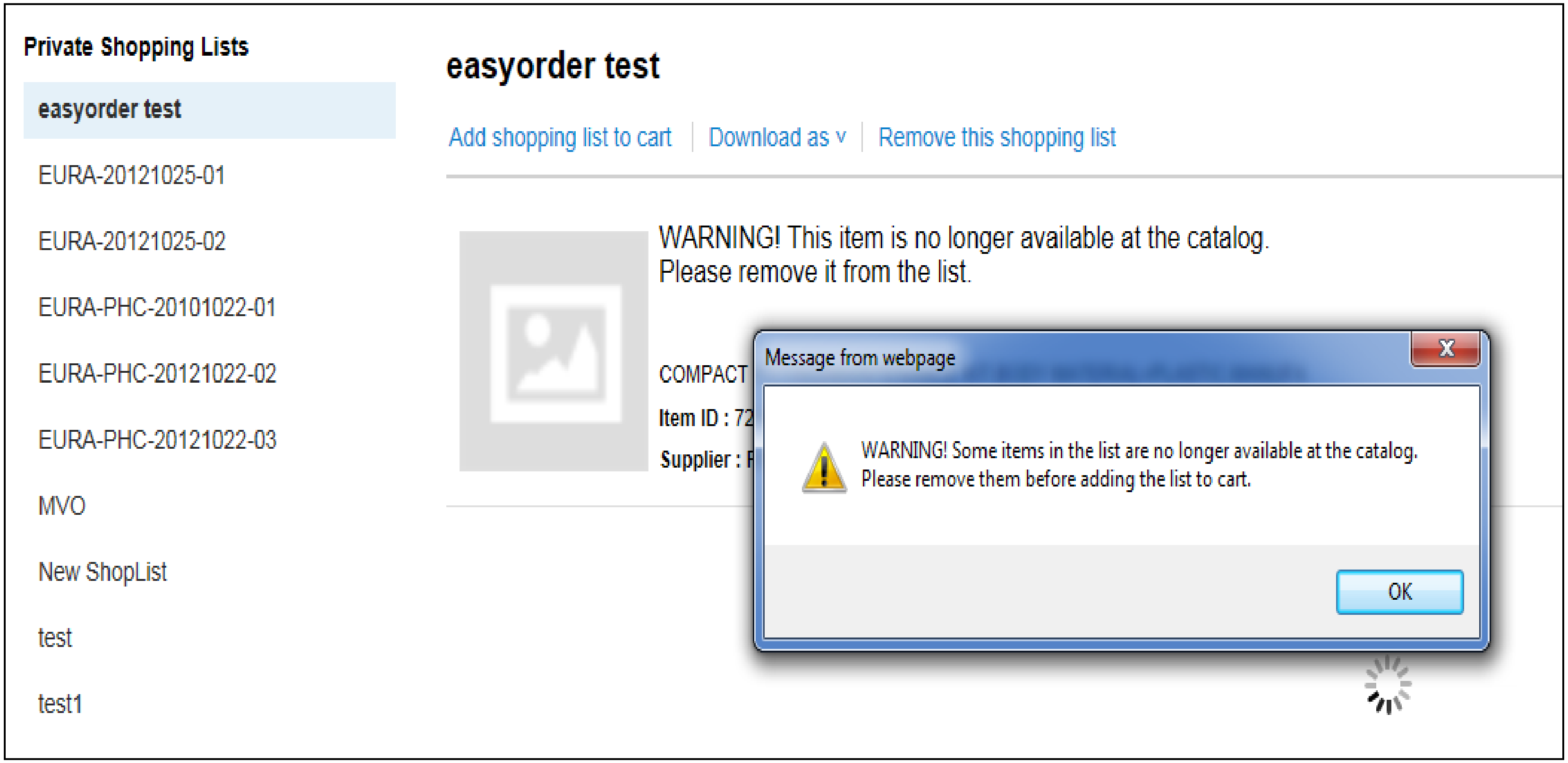
- A warning message is also displayed for those items that are no longer available in the catalog.




- Click on Remove from shopping list to remove from the shopping list the item that is no longer available.



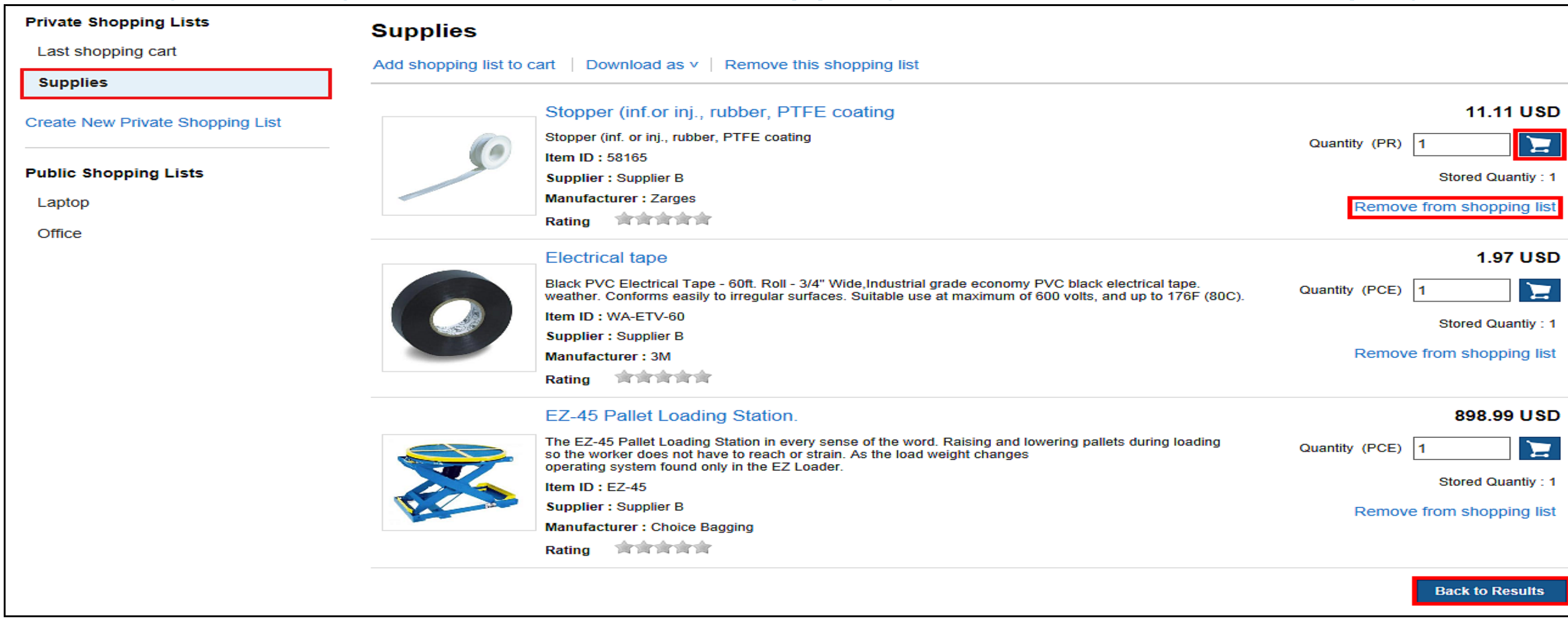
- The “no longer available” items must be removed from the shopping list in order to add it to the shopping cart; otherwise a warning message will be displayed when attempting to do so.



# Maintaining Shopping Lists

- To manage your shopping lists, click on **Shopping Lists** from the main menu.


- By clicking the name of the shopping list its contents is displayed.




1. To change the quantity of the items, type the number in the Cart Quantity field and click on [cart icon]
2. To remove items from the shopping list, click on Remove from shopping list at the line item.
3. Click Back to Results to close the shopping list screen and go to the landing page.

# Hubwoo Support Contact Information

- Hubwoo Global Customer Services, Supplier Support
  - +1 866 446 8203 (US Toll Free)
  - customercare@Hubwoo.com

# - END -