

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

Topics

Welcome to the **Order Management Standard Supplier Training**.

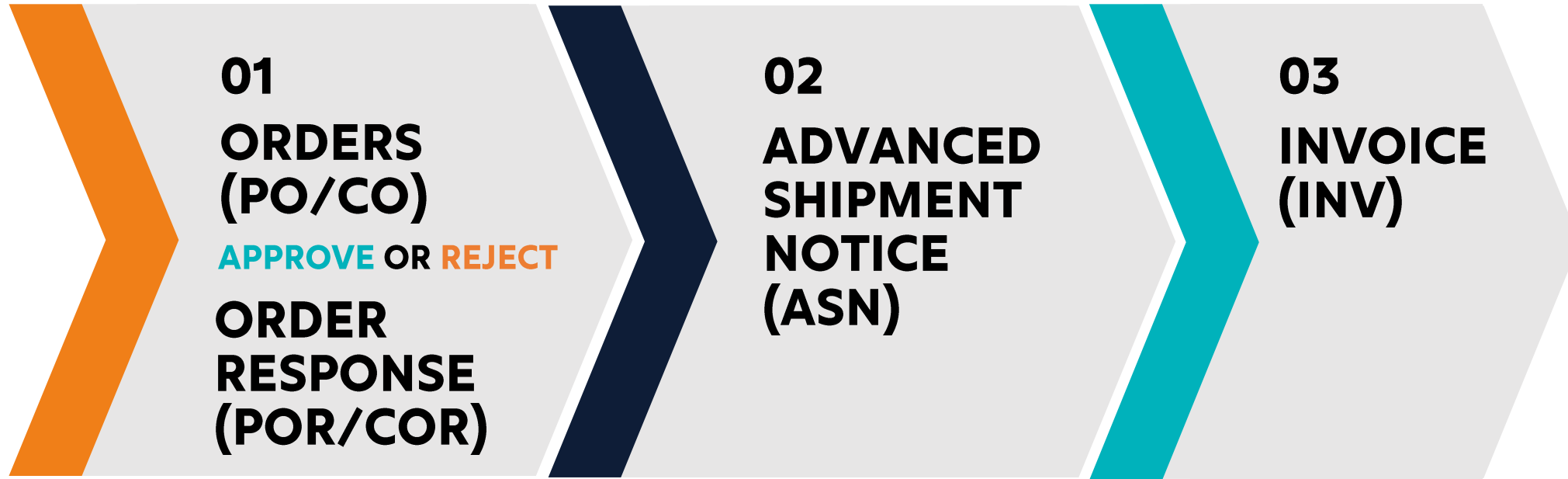
During this presentation you will learn:

- 🌀 Overview
- 🌀 Access to Order Management
- 🌀 Working with Documents:
 - 🌀 Purchase Orders (PO) / Purchase Order Response (POR)
 - 🌀 Change Orders (CO) / Change Order Response (COR)
 - 🌀 Advanced Shipment Notices (ASN)
 - 🌀 Invoices (INV)

Overview

BUYER

- 🌀 Search Catalog
- 🌀 Transfer to Shopping Cart
- 🌀 Approval
- 🌀 PO Creation



ORDER MANAGEMENT | BASIC DOCUMENTS

Login Page

The screenshot shows a web browser window with the address bar containing `https:portal.hubwoo.com`. The page features a search bar at the top left, a main heading "The Business Network", and a "Sign In" button. Below the heading, there are input fields for a username (containing "TRAINSUPGCS4") and a password (represented by dots). A "Sign In" button is located below the password field. The page also includes a section titled "The Network In Action" with a list of activity items, each with a flag icon and a timestamp. At the bottom right, there is a logo for "oactis" and "ictis".

Go to `portal.hubwoo.com`




Enter you Username and Password

Click Sign in.

It is free to join

Set up a listing for your business, putting your products and services in front of qualified buyers with hundreds of billions of dollars in spend.

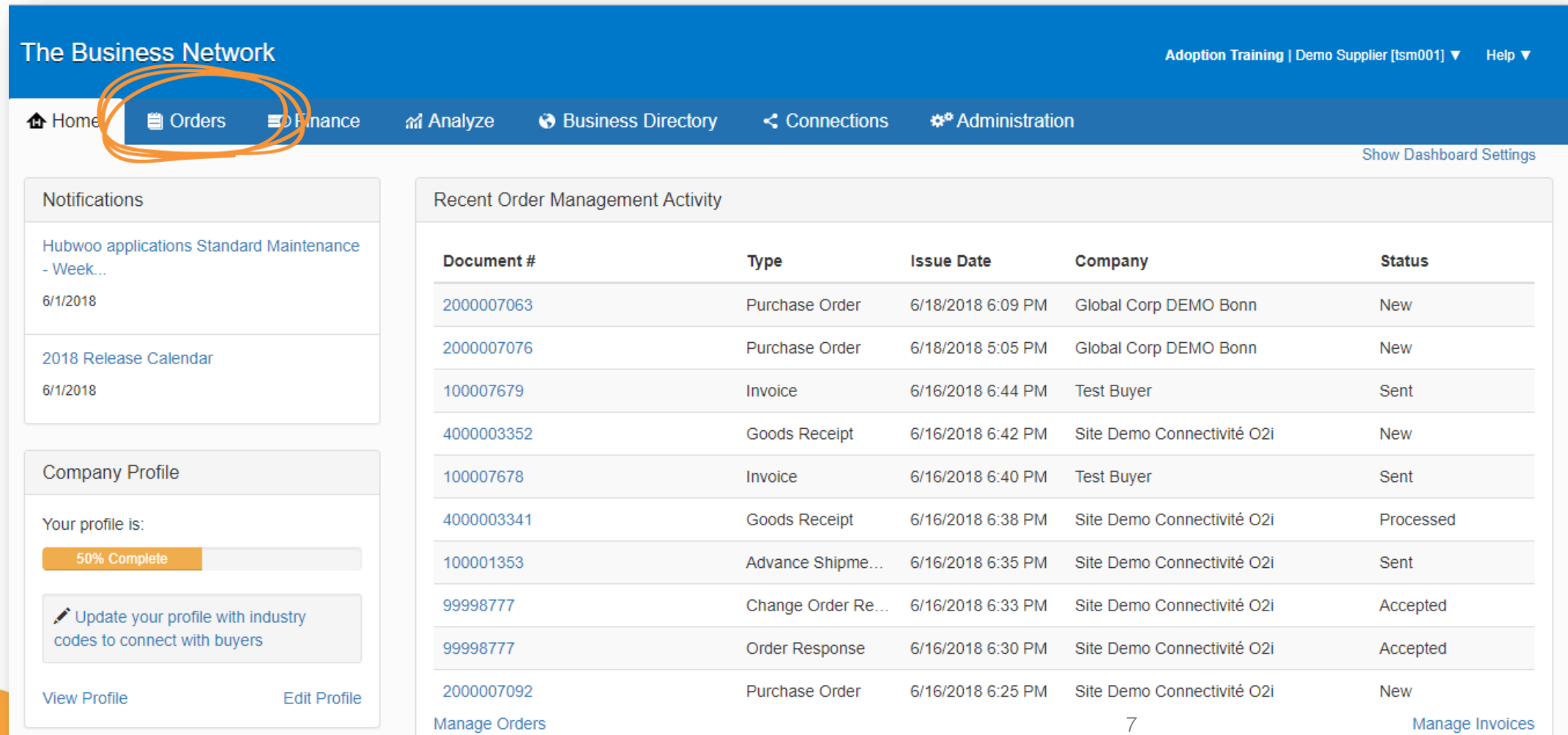
The Network In Action

-  A company in Italy has added a certification. Click [here](#) to view their profile. - 20 Jan 2022 5:47:46 PM
-  Zaetric Business Solutions, LLC's banner ad was viewed in The Business Directory. Click [here](#) to view their profile. - 14 Aug 2017 5:10:59 PM
-  A Quote was sent from a supplier in France to a buyer in France. - 27 Jan 2022 1:55:32

oactis ictis

Orders Tab

To use the Order Management tool, click **Orders** tab from the top menu.



The Business Network

Adoption Training | Demo Supplier [tsm001] ▼ Help ▼

Home **Orders** Finance Analyze Business Directory Connections Administration

Show Dashboard Settings

Notifications

Hubwoo applications Standard Maintenance - Week...
6/1/2018

2018 Release Calendar
6/1/2018

Company Profile

Your profile is:
50% Complete

Update your profile with industry codes to connect with buyers

View Profile Edit Profile

Recent Order Management Activity

Document #	Type	Issue Date	Company	Status
200007063	Purchase Order	6/18/2018 6:09 PM	Global Corp DEMO Bonn	New
200007076	Purchase Order	6/18/2018 5:05 PM	Global Corp DEMO Bonn	New
100007679	Invoice	6/16/2018 6:44 PM	Test Buyer	Sent
400003352	Goods Receipt	6/16/2018 6:42 PM	Site Demo Connectivité O2i	New
100007678	Invoice	6/16/2018 6:40 PM	Test Buyer	Sent
400003341	Goods Receipt	6/16/2018 6:38 PM	Site Demo Connectivité O2i	Processed
100001353	Advance Shipme...	6/16/2018 6:35 PM	Site Demo Connectivité O2i	Sent
99998777	Change Order Re...	6/16/2018 6:33 PM	Site Demo Connectivité O2i	Accepted
99998777	Order Response	6/16/2018 6:30 PM	Site Demo Connectivité O2i	Accepted
200007092	Purchase Order	6/16/2018 6:25 PM	Site Demo Connectivité O2i	New

Manage Orders 7 Manage Invoices

Order Page

After you have clicked on **Orders** from either option the following screen will appear.

The screenshot shows the 'The Business Network' interface. The top navigation bar includes 'Home', 'Orders', 'Finance', 'Analyze', 'Business Directory', 'Connections', and 'Administration'. The 'Orders' section is active, showing sub-tabs for 'Overview', 'Orders', 'Change Orders', 'Shipment Notices', 'Goods Receipts', and 'Cart'. A left sidebar contains 'Alerts' with links for 'Alerts Inbox', 'Messages Inbox', and 'Favorites'. The main content area has tabs for 'Orders', 'Change Orders', 'ASNs', 'Goods Receipts', 'Entry Sheets', 'Invoices', and 'Credits'. A list of order status folders is shown: 'New (29387)', 'Accepted (2622)', 'Accepted With Changes (654)', 'Rejected (21)', and 'Processing (212)'. Below this is an 'Advanced Search' form with fields for PO Number, Buyer Name, Supplier Ref No., Account Code, Plant ID, Contract Number, Start Date, End Date, Order Status, and Order Type, along with a 'Search' button. Two orange callout boxes highlight the status folders and the search form.

Advanced Search allows you to refine the criteria when you're looking for a specific document(s).

Documents Tab and Folders

Folder lists are available in each Document tab. Folders come in handy when reviewing documents according to their status.

The screenshot displays a navigation bar with the following tabs: **Orders**, **Change Orders**, **ASNs**, **Invoices**, **Goods Receipts**, and **Credit Advices**. Below the tabs, a list of folders is shown under the 'Orders' tab:

- [New Orders \(32\)](#)
- [Accepted Orders \(1\)](#)
- [Accepted with Changes Orders \(2\)](#)
- [Rejected Orders \(0\)](#)
- [Processing Orders \(3\)](#)

An orange callout box points to the 'New Orders (32)' folder with the text: **Click New Orders.**

Search Page

Search Orders

Company: Demo Supplier
06-Feb-2022

Search Options

i Search Options are combined using AND operation

PO Number:	<input type="text"/>	Exact match v	Order Status:	All v
Buyer Name:	<input type="text"/>	Exact match v	Order Receipt Status:	All v
Supplier Reference Number:	<input type="text"/>		Start Date:	<input type="text"/> 📅
Account Code:	<input type="text"/>		End Date:	<input type="text"/> 📅
Plant ID:	<input type="text"/>		Order Type:	All v
Contract Number:	<input type="text"/>			

Search

Search Results

[Select All](#) | [Clear All](#) | [Add to Basket](#) | [Print Selected to PDF](#) | [Export Selected to Excel](#) | [Build ASN](#) | [Build Invoice](#) **v**

	PO Number	Buyer	Account Code	Status	Order Date	Total Cost	Invoiced Amount	Action
<input type="checkbox"/>	2000007960	Global Corp DEMO Paris	P142V0004-888888436	New	22-Jan-2022 07:00:00 PM	600.00 EUR		
<input type="checkbox"/>	2000007950	Global Corp DEMO Paris	P142V0004-888888436	New	11-Dec-2021 07:00:00 PM	600.00 EUR		
<input type="checkbox"/>	2000007940	Global Corp DEMO Paris	P142V0004-888888436	New	23-Oct-2021 06:00:00 PM	600.00 EUR		
<input type="checkbox"/>	2000007900	Global Corp DEMO Paris	P142V0004-888888436	New	14-Aug-2021 06:00:00 PM	600.00 EUR		
<input type="checkbox"/>	2000007860	Global Corp DEMO Paris	P142V0004-888888436	New	24-Apr-2021 06:00:00 PM	100.00 EUR		
<input type="checkbox"/>	2000007590	Global Corp DEMO Paris	P142V0004-888888436	New	07-Mar-2020 07:00:00 PM	1.00 EUR		
<input type="checkbox"/>	2000007600	Global Corp DEMO Paris	P142V0004-888888436	New	07-Mar-2020 07:00:00 PM	1.00 EUR		
<input type="checkbox"/>	2000007453	Global Corp DEMO Paris	P142V0004-888888436	New	05-Oct-2019 06:00:00 PM	1.00 EUR		

[Select All](#) | [Clear All](#) | [Add to Basket](#) | [Print Selected to PDF](#) | [Export Selected to Excel](#) | [Build ASN](#) | [Build Invoice](#) **v**

Search Options:
can be defined to
filter documents in
Search Results.

Page navigation:
is available at the
bottom of the
Search Results.

Action Icons

POs can be identified by the PO number, Buyer, Account Code and Order Date.

Action icons are options to manage a document. These 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	Invoiced Amount	Action
<input type="checkbox"/>	4500128720	Hubwoo PERF Houston	P042V0013-888888436	New	02-Dec-2014 07:00:00 PM	50.00 USD		
<input type="checkbox"/>	PM20000050001	Global Corp DEMO Paris	P142V0004-888888436	New	02-Dec-2014 06:00:00 PM	3,938.00 EUR		
<input type="checkbox"/>	2000006054	Site Demo Connectivité O2i	P142V0013-888888436	New	27-Nov-2014 07:00:00 PM	50.00 EUR		
<input type="checkbox"/>	2000006053	Site Demo Connectivité O2i	P142V0013-888888436	New	27-Nov-2014 07:00:00 PM	50.00 EUR		
<input type="checkbox"/>	2000006070	Site Demo Connectivité O2i	P142V0013-888888436	New	27-Nov-2014 07:00:00 PM	90.00 EUR		



Download PDF

Let's review an order.

To print an order, click **Download PDF** icon in the **Actions** column. This allows you to view the details of the order in PDF format.



Click **Download PDF** icon

File Download Box

The PDF copy will appear at the bottom of the page. This gives you an option to **Open** or **Save** the document.

The screenshot displays the 'The Business Network' interface. The top navigation bar includes 'Home', 'Orders', 'Finance', 'Analyze', 'Business Directory', 'Connections', and 'Administration'. The 'Orders' section is active, showing sub-options like 'Overview', 'Orders', 'Change Orders', 'Shipment Notices', 'Goods Receipts', and 'Cart'. The main content area is titled 'Search Orders' and includes a 'Search Options' section with various input fields (PO Number, Buyer Name, Supplier Reference Number, Account Code, Plant ID, Contract Number) and dropdown menus (Exact match, Order Status, Start Date, End Date, Order Type). A 'Search' button is located below these fields. The 'Search Results' section shows a table with columns: PO Number, Buyer, Account Code, Status, Order Date, Total Cost, Invoiced Amount, and Action. A 'PurchaseOrder.PDF' file is listed in the table, and a 'Show all' button is visible in the bottom right corner. A red circle highlights the 'PurchaseOrder.PDF' entry in the table.

PDF Format

If you will choose to open the file with **Adobe Acrobat**, choose **Print** from the menu.

Purchase Order			
Order No.:	3500001108		
Order Date:	22-Jun-2011 05:00:00 PM		
Account Code:	P168W098-619666666		
Plant ID:	000000114		
Currency:	EUR		
Supplier Number:	619666666		
Customer:	T. USER 601		
Customer number:	P168W098		
Buyer Party:		Buyer Order Contact:	
Ident:	P168W098	Contact name:	T. USER 601
Company Name:	Non Inv Matl	Telephone:	01 01 01 01
Additional Ident:	0000010849	Fax:	01 01 01 01
Name 2:	DE120001	Email:	rkuhn@hubwoo.com
Street:	SIGMA-ALDRICH CHEMIE GmbH		
Street Supplement 1:	Eschenstrasse 5		
City:	Taufkirchen		
Region:	09		
Zip/Postal Code:	82024		
Country:	Germany, Federal Republic of		
Supplier Party:		Seller Order Contact:	
Ident:	619666666	Contact name:	C. Person
Company Name:	PS Demo Supplier 2	Telephone:	909 980 4434
Additional Ident:	0000011189	Fax:	+1 1111111111111111
Name 2:	Z619666666	Email:	test@hubwoo.com
Street:	10275 Philadelphia Court		
City:	Rancho Cucamonga		
Region:	Other		
Zip/Postal Code:	91730		
Country:	United States		
Bill To:		Billing Order Contact:	
Ident:	1460	Contact name:	-
Company Name:	Sigma-Aldrich Chemie GmbH	Telephone:	N/A
Street:	Eschenstrasse 5	Fax:	N/A
City:	Taufkirchen	Email:	N/A
Region:	Other		
Zip/Postal Code:	82024		
Country:	Germany, Federal Republic of		
Ship To:		Shipping Order Contact:	
Ident:	0000000114	Contact name:	Test USER 601
Company Name:	Sigma-Aldrich Chemie GmbH	Telephone:	111111
Name 2:	1460	Fax:	N/A
Street:	Eschenstrasse 5	Email:	ap-stl@sial.com
City:	Taufkirchen		
Region:	Other		
Zip/Postal Code:	82024		
Country:	Germany, Federal Republic of		
Transport Information:			
Transport Mode:	Other		
Payment Other:			
Payment Mean Code:	Instrument Not Defined		
Payment Terms Code:	Other		
Payment Terms Code Other:	AA30		
Order No. : 3500001108	Date Of Print: 10-Sep-2013 11:46:57 PM	- 1 -	Buyer: Non Inv Matl Seller: PS Demo Supplier 2

Quantity Tracking

This feature is used to:

- compare the PO quantity with the invoiced quantity
- track the remaining quantity (unbilled invoice)

Home > Search Invoices > Related Documents > View Invoice > View Quantity Tracking

Company: Demo Supplier
07-Feb-2022

[Return](#)

1 . Purchase Order Number: 2000007680_T

Line No	Item Description	Ordered		Changed		Sent		Total Sent Quantity	Total Sent Quantity	Quantity	Total Shipped Quantity	Total Cancelled/Returned Quantity	Total Received Quantity
		Quantity	Price	Quantity	Price	Quantity	Price						
0000000001	TEST RELEASE 19.3	1.00	5.00			1.00	5.00		1.00			0.00	0.00

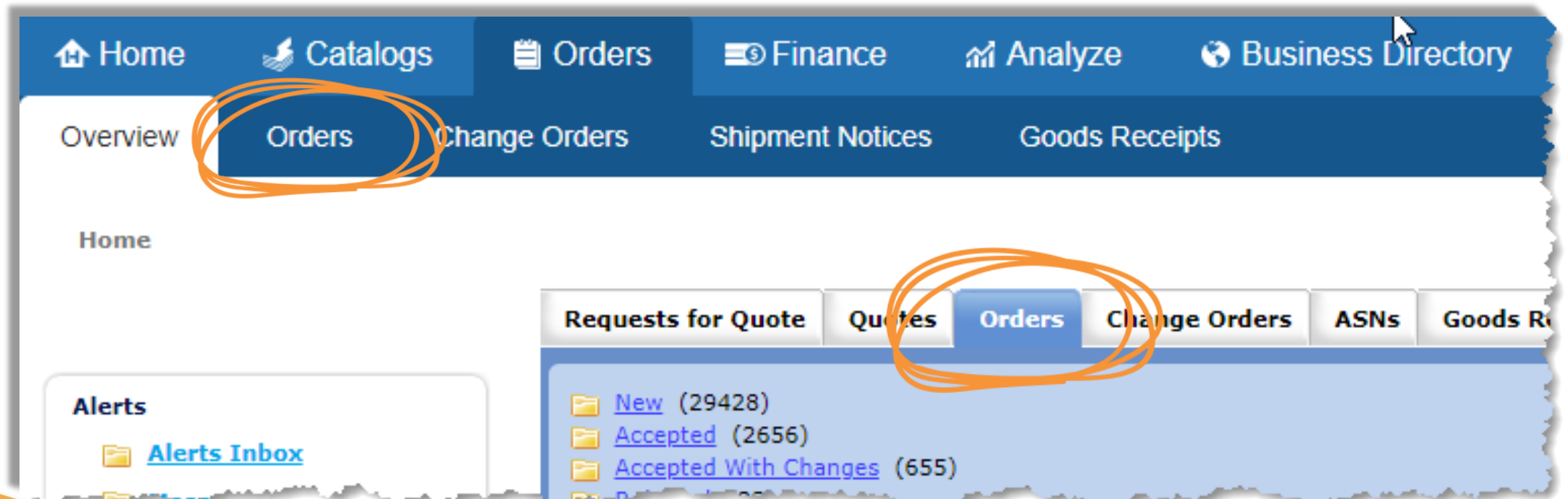
Orders and Change Orders

- 🌀 Access Orders and Change Orders modules
- 🌀 Review/Modify an Order
- 🌀 Send an Order Response
- 🌀 Reject the entire Order
- 🌀 Reject an Order Line Item(s) only

Orders

There are 2 ways to view Purchase Orders:

- From the top menu, go to Orders > **Orders**
- Orders > Overview > **Orders**




































View an Order

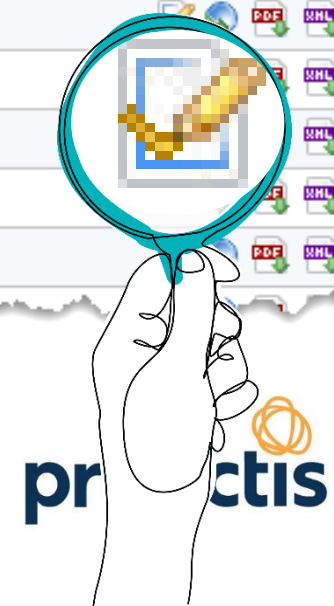
View and process an order (PO / CO) by clicking on the Open PO icon in the Action column.

To Open a document

Search Results

[Select All](#) | [Clear All](#) |  [Add to Basket](#) |  [Print Selected to PDF](#) |  [Export Selected to Excel](#) |  [Build ASN](#) |  [Build Invoice](#) ▼

	PO Number	Buyer	Account Code	Status	Order Date	Total Cost	Invoiced Amount	Action
<input type="checkbox"/>	2000007960	Global Corp DEMO Paris	P142V0004-888888436	New	22-Jan-2022 07:00:00 PM	600.00 EUR		   
<input type="checkbox"/>	2000007950	Global Corp DEMO Paris	P142V0004-888888436	New	11-Dec-2021 07:00:00 PM	600.00 EUR		   
<input type="checkbox"/>	2000007940	Global Corp DEMO Paris	P142V0004-888888436	New	23-Oct-2021 06:00:00 PM	600.00 EUR		   
<input type="checkbox"/>	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:00 PM	600.00 EUR		   
<input type="checkbox"/>	2000007900	Global Corp DEMO Paris	P142V0004-888888436	New	14-Aug-2021 06:00:00 PM	600.00 EUR		   
<input type="checkbox"/>	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Accepted	12-Jun-2021 06:00:00 PM	100.00 EUR		   
<input type="checkbox"/>	2000007860	Global Corp DEMO Paris	P142V0004-888888436	Accepted	24-Aug-2021 06:00:00 PM	200.00 EUR		   



Order Details

The **Order Details** page presents the **buyer details** and **contact information**; and the **Order Lines** items.

Buyer Info

Ident: P164W017
Company name: Imlay City, MI
Name 2: 1014001
Street: 332 Graham Road
City: Imlay City
Region: MI
Zip/Postal Code: 48444
Country: United States

Buyer Order Contact:

Contact name: J. ROWE
Telephone: 01 01 01 01
Fax: 01 01 01 01
Email: diane.pekunka@scotts.com

Order Header

Order No.: 8100000448
Supplier Ref. No.: *
Supplier Delivery Date:
Plant ID: 0000000117
Status: New
Requested Delivery Date:

Order Lines

Expand All [Select All](#) [Clear All](#) [Add to Basket](#) [Build ASN](#) [Build Invoice](#)

No.	Part No.	Description	Status	Requested Delivery Date	Supplier Delivery Date	UOM	Quantity	Unit Price	Cur
<input type="checkbox"/>	0000000001 Seller: 1256326	Rollerball pens	Processing	06-Oct-2010 11:00:00 AM	06-Oct-2010 11:00:00 AM	Box	2.00	25.00	USD

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

[Select All](#) [Clear All](#) [Add to Basket](#) [Build ASN](#) [Build Invoice](#)

Order Lines

Some buyers allow their suppliers to change the **Delivery Date**, **Quantity**, and **Unit Price**.

If these fields are greyed out, reach out to your buyer directly. Buyers may opt to send a Change Order to have the values updated.

The screenshot shows a web application interface for 'Order Lines'. At the top, there are buttons for 'Expand All', 'Select All', 'Clear All', and 'Add to Basket'. Below this is a table with the following columns: No., Part No., Description, Status, Requested Delivery Date, Supplier Delivery Date, UOM, Quantity, Unit Price, and Currency. A single row is visible with the following data: No. 0000000001, Part No. Seller: 1256326, Description Rollerball pens, Status Processing, Requested Delivery Date 06-Oct-2010 11:00:00 AM, Supplier Delivery Date 06-Oct-2010 11:00:00 AM, UOM Box, Quantity 2.00, Unit Price 25.00, and Currency USD. Below the table, there is a summary bar showing 'Records: 1, pages: |<< 1 / 1 >>|' and buttons for 'Select All', 'Clear All', 'Add to Basket', 'Build ASN', and 'Build Invoice'. At the bottom right, there are labels for 'Sub Total for the', 'Tax Total for the', and 'Amount for the'. The 'productis' logo is in the bottom right corner.

Use the **calendar picklist** to modify the delivery date.

In this example, the **Unit Price** cannot be changed.

Modify the quantity directly.

Sub Total for the
Tax Total for the
Amount for the

productis

Supplier Reference Number

Send an order response (POR / COR) to the buyer after going through the order. It is mandatory to fill the **Supplier Reference Number** in the **Order Header** section.

The screenshot shows a web form with two main sections: Buyer Info and Order Header. The Buyer Info section includes fields for Ident, Company Name, Street, City, Region, Zip/Postal Code, and Country. The Order Header section includes fields for Order No., Supplier Ref. No., Supplier Delivery Date, Plant ID, Status, and Requested Delivery Date. A red callout box points to the Supplier Ref. No. field, stating that it can be up to 16 characters long.

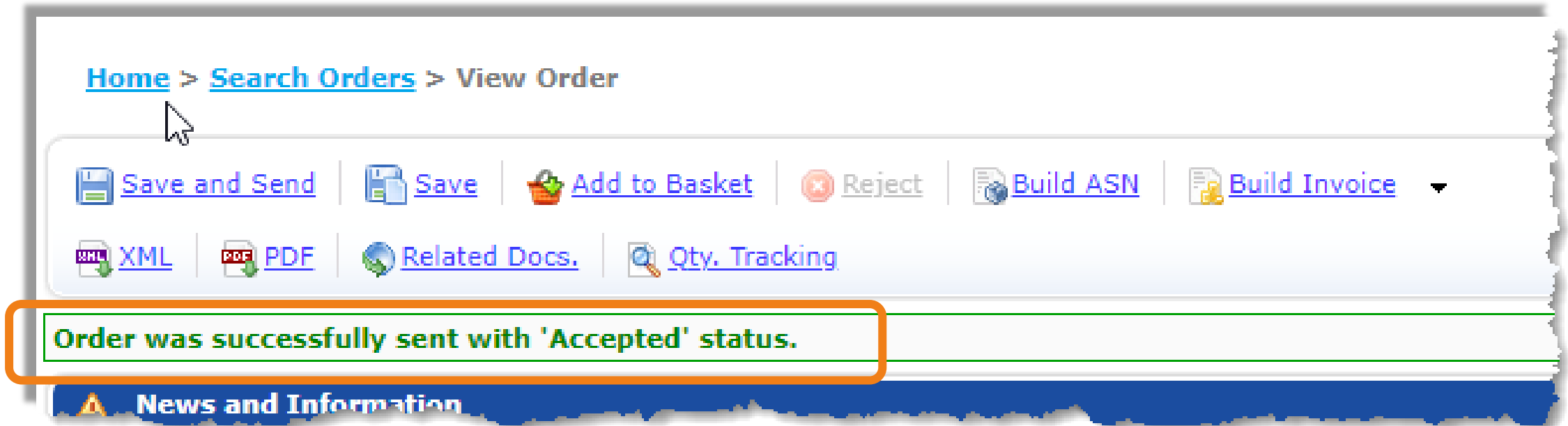
Buyer Info		Buyer Order Contact:	
Ident:	888881001	Contact Identifier:	
Company Name:	Test Buye	Contact name:	Perry, Darryl
Street:	10777 Westheimer	Telephone:	
City:	Houston	Email:	dperry@hubwoo.com
Region:	TX	Fax:	
Zip/Postal Code:	77042		
Country:	US		

Order Header			
Order No.:	00069	Plant ID:	0034001
Supplier Ref. No.:	<input type="text"/>	Status:	<input type="text" value="New"/>
Supplier Delivery Date:	<input type="text"/>	Requested Delivery Date:	25-Dec-2008 11:59:59 PM

Save and Send

If no changes are needed, click **Save and Send**.

A confirmation message will appear at the top of the page when the document has been sent to the buyer.



The screenshot shows a web interface with a breadcrumb trail: [Home](#) > [Search Orders](#) > [View Order](#). Below the breadcrumb is a menu bar with several options: [Save and Send](#) (with a floppy disk icon), [Save](#) (with a floppy disk icon), [Add to Basket](#) (with a shopping basket icon), [Reject](#) (with a red 'X' icon), [Build ASN](#) (with a document icon), and [Build Invoice](#) (with a document icon and a dropdown arrow). Below the menu bar are four more options: [XML](#) (with a document icon), [PDF](#) (with a document icon), [Related Docs.](#) (with a globe icon), and [Qty. Tracking](#) (with a magnifying glass icon). A green-bordered box with an orange border highlights a confirmation message: **Order was successfully sent with 'Accepted' status.** At the bottom of the interface, there is a blue bar with a warning icon and the text **News and Information**.

Reject an Order

Rejecting an order can happen for many reasons. The buyer may no longer need the part; or maybe you don't carry that particular part anymore.

The screenshot shows the Proactis web interface. At the top, there are navigation tabs: Overview, Orders, Change Orders, Shipment Notices, Goods Receipts, and Cart. Below the tabs is a breadcrumb trail: Home > Search Orders > View Order. A central toolbar contains several action buttons: Save and Send, Save, Add to Basket, Reject, Build ASN, and Build Invoice. Below the toolbar are links for XML, PDF, Related Docs., and Qty. Tracking. A blue bar at the bottom of the screenshot is partially visible, labeled 'and Information'.

1. To reject the entire PO, click the **Reject** button

2. Click **Save and Send**.

Reject an Order Line Only

Open the Order and the Order Line Item you want to reject.

Home > Search Orders > View Order > View Order Line

Company: Demo Supplier
07-Feb-2022

Save | Add to Basket | **Reject and Return to PO** | Return to PO

Order Header

To send the document to the buyer, don't forget to click **Save and Send**.

Click **Save and Send**.

Home > Search Orders > View Order

Save and Send | Save | Unreject | Build ASN | Build Invoice

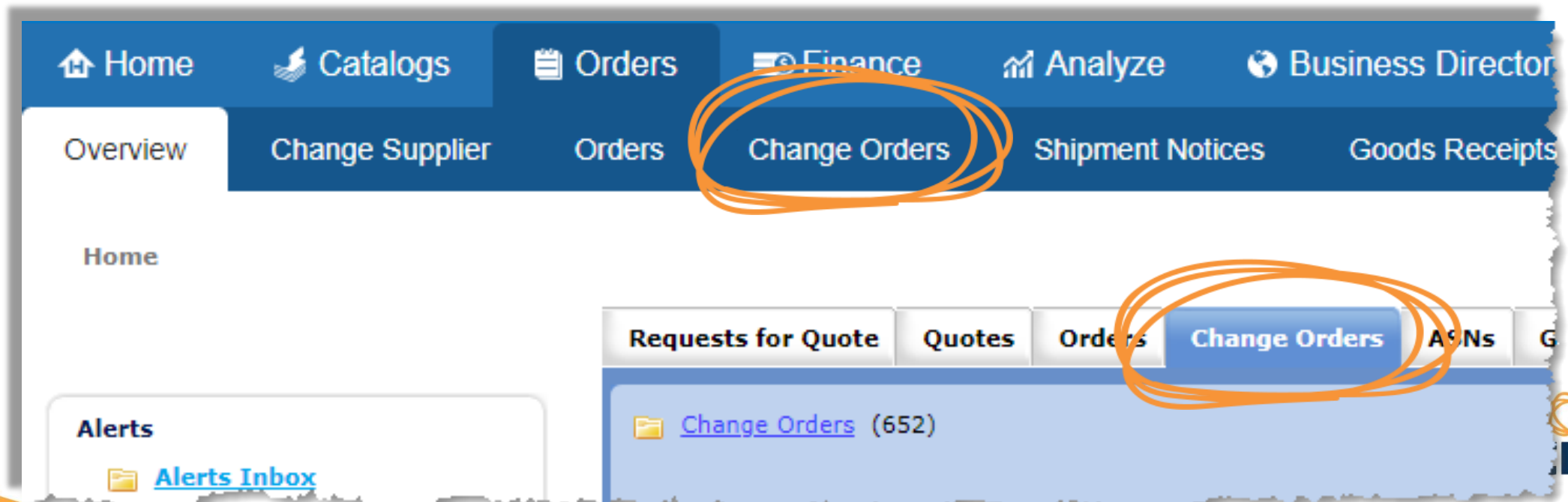
XML | PDF | Related Docs. | Qty. Tracking

Order was successfully rejected with 'Rejected' status. The document will not be sent out until 'Save and Send' is clicked.

Change Orders

There are 2 ways to view Change Orders:

- From the top menu, go to Orders > **Change Orders**
- Orders > Overview > **Change Orders**



CO Changes

Change Order Lines are color-coded to show changes from the original PO or previous CO.

No.	Part No.	Description	Status	Requested Delivery Date	Delivery Date	UOM	Quantity	Unit Price	Currency	Amount	Action
0000000001	Seller:	Item_Desc_d90a0b1e	Accepted	27-May-2014 06:00:00 PM	27-May-2014 06:00:00 PM	EA - Each	10.00	7.00	EUR	70.00	
0000000002	Seller:	Item_Desc_c01a92fe	Accepted	27-May-2014 06:00:00 PM	27-May-2014 06:00:00 PM	EA - Each	0.00	5.00	EUR	0.00	

Records: 2, pages: | < < 1 / 1 > > |

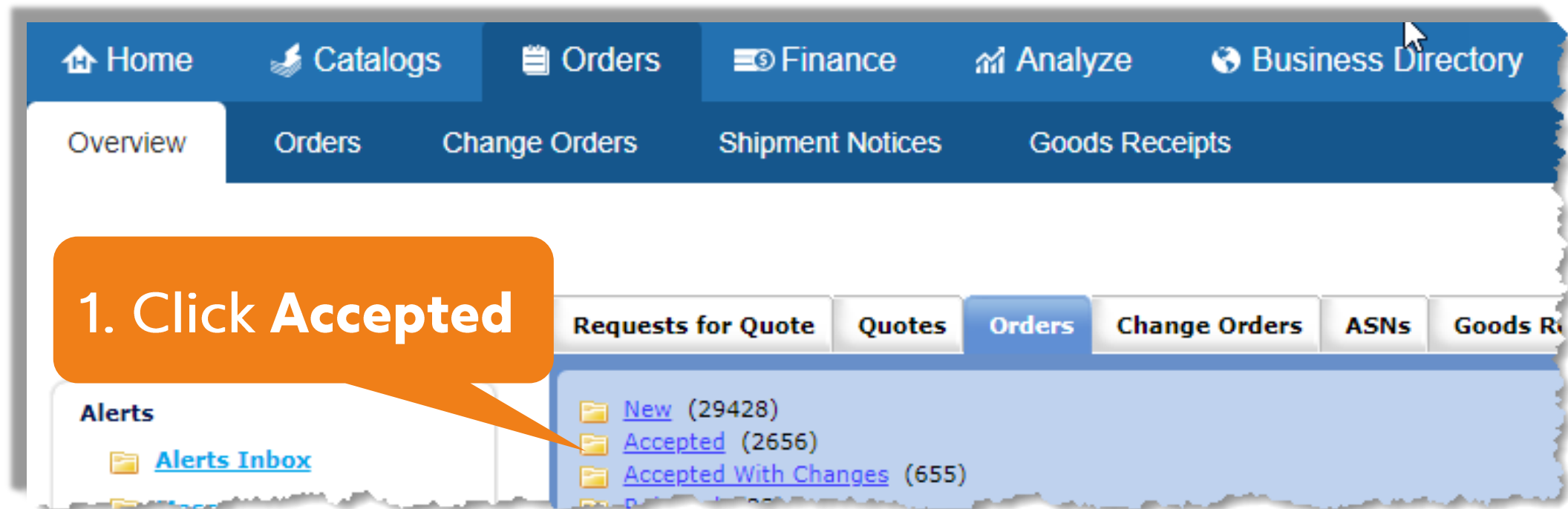
- Red** indicates that a change has been made.
- Red with strikethrough** indicates that the item has been deleted
- Green** indicates that no change was made
- Yellow** indicates that the line item has been added

Advanced Shipment Notice

- 🌀 Create an ASN from an Order
- 🌀 Create an ASN from an Order Line

1. Create an ASN From an Order

To create an invoice from a POR, go to **Orders** > **Overview** > **Orders** and click the **Accepted** folder.



1. Create an ASN From an Order

The Orders Search Result page has 2 Build ASN links – at the top and bottom.

2. Select an Order

Search Results

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

	PO Number	Buyer	Account Code	Status	Created
<input checked="" type="checkbox"/>	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:00 PM
<input type="checkbox"/>	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Jun-2021 06:00:00 PM

3. Click **Build ASN**

2. Create an ASN From an Order Line

Open PO and then select the Order Line Item

Order Header

Order No.: _____ Plant ID: 0000000013
Supplier Ref. No.: * _____ Status: Accepted
Supplier Delivery Date: _____ Requested Delivery Date: _____

Order Lines

Expand All | Select All | [Clear All](#) | [Add Lines](#) | [Add to Basket](#) | [Build ASN](#) | [Build Invoice](#)

No.	Part No.	Description	Status	Requested D	Supplier Delivery Date *	UOM	Quantity *	Unit Price *
<input checked="" type="checkbox"/> 0000000001	Seller: 332-5699 Buyer: N/A	VENTILATEUR TANGENTIE	Accepted	13-Jun-2021 06:00:00 PM	13-Jun-2021 06:00:00 PM	PK - Package	100.00	1.00

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

[Select All](#) | [Clear All](#) | [Add Lines](#) | [Add to Basket](#) | [Build ASN](#)

2. Select an Order Line

3. Click Build ASN

ASN Details

4. Fill out all mandatory fields. *

Home > Search Orders > View ASN Company: Demo Supplier
07-Feb-2022

[Save and Send](#) | [Save Draft](#) | [Delete](#)
[XML](#) | [PDF](#) | [Related Docs.](#) | [Qty. Tracking](#)

Warning: ASN has Items that have not been associated with any package

ASN Details

Issue Date:	07-Feb-2022 07:36:20 AM	Status:	Pending
ASN Number: *	100001382	Tracking Number:	
Delivery Note Number:		Account Code:	P142V0004-888888436
Ship Date: *	07-Feb-2022 07:36:20 AM	Purpose:	Original
Delivery Date:		Term of Delivery:	Other
Earliest Delivery Date:		Buyer Name:	Global Corp DEMO Paris
Latest Delivery Date:		Seller Name: *	Demo EMEA Search
Collection Date:		Payment Method:	Other
Scheduled Delivery Date Before:		Payment Term:	Other
Scheduled Delivery Date After:		Payment Term Other: *	90E0
Plant ID:	0000000013	Payment Mean: *	Instrument Not Defined
		Payment Mean Other:	

Add a Package

Add a new package if the ASN is not associated with any packages yet

6. Fill out the Package ID, Marker and Type

5. Click Add New Package

7. Select the line item(s) and enter the amount of items you want to add to the package.

Home > Search Orders > View ASN > View ASN Package

Save Return to ASN Copy Package

Package Details

Package ID* 1 Hazard Code:

Package Marker:* Package Marker Package Type:* Unit

Special Handling Code:

Shipping Instruction:

Weights & Measures

	Value	UOM	UOM Other
Net Weight:	<input type="text"/>	Kilogram	<input type="text"/>
Gross Weight:	<input type="text"/>	Kilogram	<input type="text"/>
Length:	<input type="text"/>	Centimeter	<input type="text"/>
Width:	<input type="text"/>	Centimeter	<input type="text"/>
Depth:	<input type="text"/>	Centimeter	<input type="text"/>

Package Lines

Select All Clear All

Line Item Number	Order Item Number	Supplier Part Number	Order Number	Description	Total Quantity	Quantity Available to pack	Quantity in this Package	Action
<input checked="" type="checkbox"/>	000000001	0000000032-5699	2000007870	VENTILATEUR TANGENTIE	100.00	100.00	<input type="text"/>	<input type="button" value="✘"/>

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

Finalize and Send the ASN

9. Click Save and Send

8. Click Return to ASN

The screenshot shows the 'View ASN Package' page in Proactis. The breadcrumb trail is 'Home > Search Orders > View ASN > View ASN Package'. The main toolbar contains 'Save' and 'Return to ASN' buttons. Below this, another toolbar shows 'Save and Send', 'Save Draft', and 'Delete' buttons. A hand cursor is pointing at the 'Save and Send' button. Below the toolbar, there are options for 'XML', 'PDF', and 'Related Docs.'. The 'ASN Details' section is visible below. A confirmation message at the bottom of the page reads 'ASN was successfully sent.'.

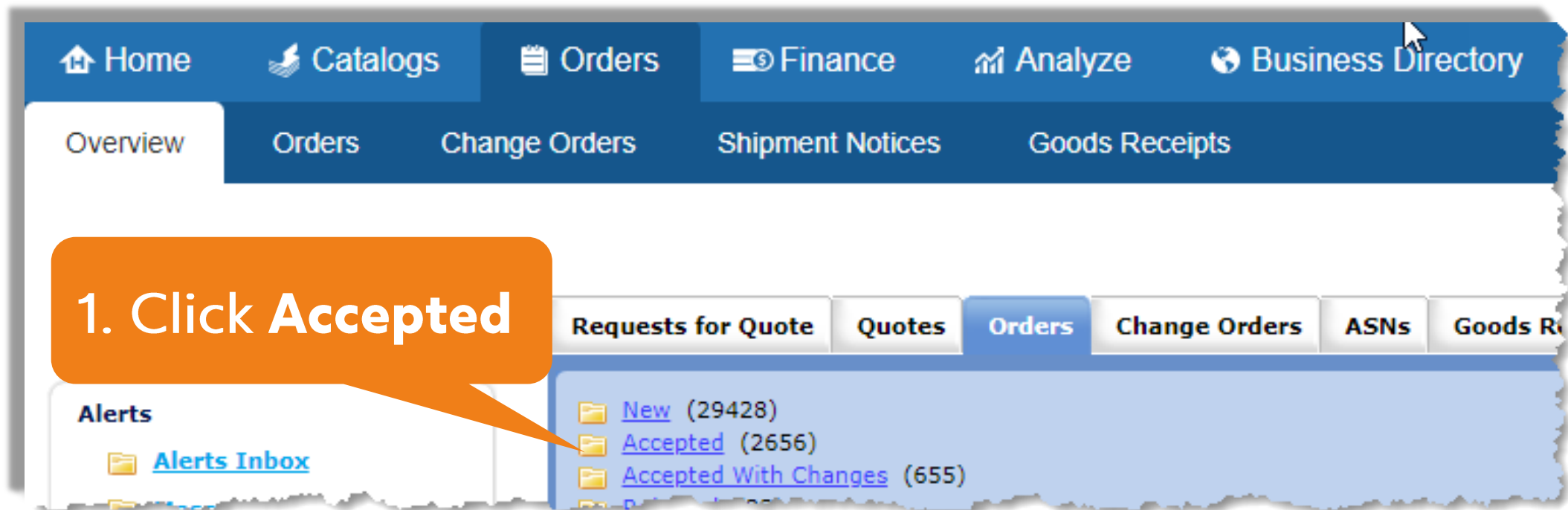
A confirmation message will appear at the top of the page when the ASN has been sent to the buyer.

Invoice

- 🌀 Create an Invoice from an Order
- 🌀 Create an Invoice from an Order Line

1. Create an Invoice From an Order

To create an invoice from a POR, go to **Orders** > **Overview** > **Orders** and click the **Accepted** folder.



The screenshot displays the Proactis software interface. At the top, a navigation bar includes links for Home, Catalogs, Orders, Finance, Analyze, and Business Directory. Below this, a secondary navigation bar shows Overview, Orders, Change Orders, Shipment Notices, and Goods Receipts. A third navigation bar contains Requests for Quote, Quotes, Orders, Change Orders, ASNs, and Goods Receipts. The 'Orders' section is active, showing a list of folders: New (29428), Accepted (2656), Accepted With Changes (655), and Partially Accepted (655). An orange callout box with the text '1. Click Accepted' points to the 'Accepted' folder. The 'Alerts' section on the left shows an 'Alerts Inbox' link.

1. Create an Invoice From an Order

The Orders Search Result page has 2 Build Invoice links – at the top and bottom.

2. Select an Order

Search Results

Select All | Clear | Add to Basket | Print Selected to PDF | Export Selected to Excel | Build AFN | Build Invoice

	PO Number	Buyer	Account Code	Status	Order Date
<input checked="" type="checkbox"/>	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:00 PM
<input type="checkbox"/>	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Accepted	12-Jun-2021 06:00:00 PM

Build Debit Invoice
Build Credit Invoice

3. Click **Build Invoice >**
Build Debit Invoice

1. Create an Invoice From an Order

The order will flip into an invoice and the invoice screen will appear.

The screenshot shows a web application interface for creating an invoice. At the top, there are navigation tabs: "Service Entries", "Invoices" (selected), "Credit Advices", and "Remittance Advices". Below the tabs, the breadcrumb path is "Home > Search Orders > View Invoice". The company name "Demo Supplier" and the date "07-Feb-2022" are displayed in the top right corner. A toolbar contains several actions: "Save and Send", "Save Draft", "Delete", "XML", "PDF", "Related Docs.", "Qty. Tracking", and "Pay Me Now". The "Buyer Info" section includes fields for "Buyer Name" (Demo Buyer Services), "Buyer Short Name" (EDP142V), "Account Code", and "P142V0004-888888436". The "Invoice Header" section contains various fields: "Invoice Number" (10007738), "Issue Date" (07-Feb-2022 05:56:51 AM), "PO Number" (200007850), "Invoice Type" (Debit Invoice), "Currency" (Euro), "Bill of Lading", "VAT/Goods Origin" (Australia), "VAT/Goods Destination" (Australia), "Payment Terms" (Other), "Net Days Due" (0), "Due Date" (7-Feb-2022 05:56:52 AM), "Discount Days Due" (0), and "Discount Rate" (0.00). There is also a checkbox for "Final Invoice" with a warning icon. A "Note:" field is located at the bottom.

Service Entries | Invoices | Credit Advices | Remittance Advices

Home > Search Orders > View Invoice

Company: Demo Supplier
07-Feb-2022

Save and Send | Save Draft | Delete
XML | PDF | Related Docs. | Qty. Tracking | Pay Me Now

Buyer Info

Buyer Name: Demo Buyer Services
Buyer Short Name: EDP142V
Account Code: P142V0004-888888436

Invoice Header

Invoice Number: * 10007738
Issue Date: * 07-Feb-2022 05:56:51 AM
PO Number: 200007850
Invoice Type: Debit Invoice
Currency: Euro
Bill of Lading:

VAT/Goods Origin: Australia
VAT/Goods Destination: Australia

Payment Terms:

Payment Term: * Other
Net Days Due: * 0 Due Date: 7-Feb-2022 05:56:52 AM
Discount Days Due: * 0 Discount Rate: * 0.00
 Final Invoice

Note:

2. Create an Invoice From an Order Line

Open PO and then select the Order Line Item

The screenshot shows the SAP Order Lines interface. An orange callout bubble points to the 'Build Invoice' button in the top toolbar, with the text '2. Select an Order Line'. Another orange callout bubble points to the 'Build Debit Invoice' option in the dropdown menu of the 'Build Invoice' button, with the text '3. Click Build Invoice > Build Debit Invoice'. The interface includes an 'Order Header' section with fields for Order No., Supplier Ref. No., Supplier Delivery Date, Plant ID, Status, and Requested Delivery Date. Below this is the 'Order Lines' section with a toolbar containing 'Expand All', 'Clear All', 'Add Lines', 'Add to Basket', 'Build ASN', and 'Build Invoice'. A table below the toolbar lists order lines with columns for No., Part No., Description, Status, Requested Date, Supplier Delivery Date, UOM, Quantity, and Unit Price. The first row is selected and shows details for 'VENTILATEUR TANGENTIE'.

Order Header

Order No.:
Supplier Ref. No.: *
Supplier Delivery Date:

Plant ID: 0000000013
Status: Accepted
Requested Delivery Date:

Order Lines

Expand All | [Clear All](#) | [Add Lines](#) | [Add to Basket](#) | [Build ASN](#) | [Build Invoice](#)

No.	Part No.	Description	Status	Requested Date	Supplier Delivery Date *	UOM	Quantity *	Unit Price *
<input checked="" type="checkbox"/> 0000000001	Seller: 332-5699 Buyer: N/A	VENTILATEUR TANGENTIE	Accepted	13-Jun-2021 06:00:00 PM	13-Jun-2021 06:00:00 PM	PK - Package	100.00	1.00

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

[Select All](#) | [Clear All](#) | [Add Lines](#) | [Add to Basket](#) | [Build ASN](#) | [Build Invoice](#)

Invoicing

You may use the same invoice number that you use in your invoicing system.

Home > Search Orders > View Order > View Invoice Company: Demo Supplier
07-Feb-2022

[Save and Send](#) | [Save Draft](#) | [Delete](#)

[XML](#) | [PDF](#) | [Related Docs.](#) | [Qty. Tracking](#) | [Pay Me Now](#)

Buyer Info

Buyer Name: Demo Buyer Services
Buyer Short Name: EDP142V

Invoice Header

Invoice Number: *	<input type="text" value="100007739"/>	VAT/Goods Origin:	<input type="text" value="Australia"/>
Issue Date: *	<input type="text" value="07-Feb-2022 06:13:52 AM"/>	VAT/Goods Destination:	<input type="text" value="Australia"/>
PO Number:	<input type="text" value="2000007870"/>	Payment Terms:	
Invoice Type:	<input type="text" value="Debit Invoice"/>	Payment Term: *	<input type="text" value="Other"/>
Currency:	<input type="text" value="Euro"/>	Net Days Due: *	<input type="text" value="0"/> Due Date: 7-Feb-2022 06:13:54 AM
Bill of Lading:	<input type="text"/>	Discount Days Due: *	<input type="text" value="0"/> Discount Rate: * <input type="text" value="0.00"/>

Final Invoice

Note:

4. Input the invoice number and date.

Apply Tax

Scroll down after the Invoice Lines, and then click the tab for Tax.

5. Choose either **Tax Rate** or **Tax Amount**.

6. Click **Apply Tax**

7. Add **Freight**, **Charges** and **Allowance**, if applicable.

The screenshot shows the 'Tax' tab in the Proactis system. At the top right, a summary table displays invoice totals:

Sub Total for the Invoice:	100.00 EUR
Freight (No Tax) : *	0.00 EUR
Charge (No Tax) : *	0.00 EUR
Allowance:*	0.00 EUR
Tax Total for the Invoice:	10.00 EUR
Total Amount for the Invoice:	110.00 EUR

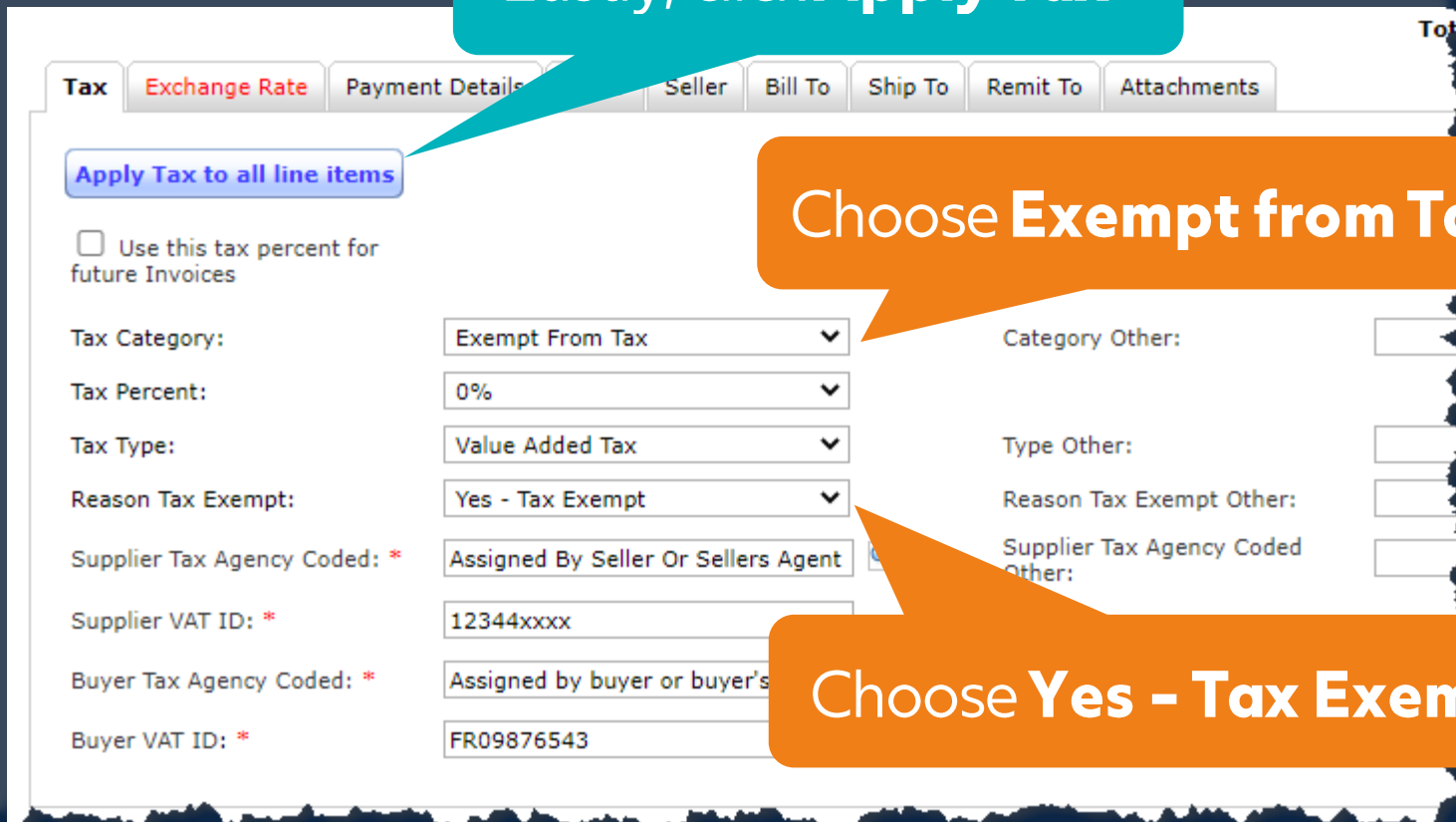
The main form area includes a tabbed interface with 'Tax' selected. A blue button labeled 'Apply Tax to all line items' is highlighted. Below it is a checkbox for 'Use this tax percent for future Invoices'. The form contains several input fields and dropdown menus:

- Tax Category: Standard Rate
- Tax Percent: 10%
- Tax Type: Value Added Tax
- Reason Tax Exempt: (empty dropdown)
- Supplier Tax Agency Coded: Assigned By Seller Or Sellers Agent
- Supplier VAT ID: 12344xxxx
- Buyer Tax Agency Coded: Assigned by buyer or buyer's agent
- Buyer VAT ID: FR09876543
- Category Other: (empty text box)
- Type Other: (empty text box)
- Reason Tax Exempt Other: (empty text box)
- Supplier Tax Agency Coded Other: (empty text box)
- Buyer Tax Agency Coded Other: (empty text box)

Tax Exempt

- 🕒 Tax Category must be "Exempt from Tax"
- 🕒 Reason Tax Exempt should be "Yes – Tax Exempt"

Lastly, click **Apply Tax**



The screenshot shows a web form for tax configuration. At the top, there are tabs: Tax, Exchange Rate, Payment Details, Seller, Bill To, Ship To, Remit To, and Attachments. The 'Tax' tab is active. Below the tabs, there is a blue button labeled 'Apply Tax to all line items'. Below this button is a checkbox labeled 'Use this tax percent for future Invoices'. The form contains several fields with dropdown menus and text inputs. The 'Tax Category' dropdown is set to 'Exempt From Tax'. The 'Tax Percent' dropdown is set to '0%'. The 'Tax Type' dropdown is set to 'Value Added Tax'. The 'Reason Tax Exempt' dropdown is set to 'Yes - Tax Exempt'. The 'Supplier Tax Agency Coded' field is set to 'Assigned By Seller Or Sellers Agent'. The 'Supplier VAT ID' field is set to '12344xxxx'. The 'Buyer Tax Agency Coded' field is set to 'Assigned by buyer or buyer's'. The 'Buyer VAT ID' field is set to 'FR09876543'. There are also fields for 'Category Other:', 'Type Other:', 'Reason Tax Exempt Other:', and 'Supplier Tax Agency Coded Other:' which are currently empty.

Tax Category:	Exempt From Tax	Category Other:	
Tax Percent:	0%	Type Other:	
Tax Type:	Value Added Tax	Reason Tax Exempt Other:	
Reason Tax Exempt:	Yes - Tax Exempt	Supplier Tax Agency Coded Other:	
Supplier Tax Agency Coded: *	Assigned By Seller Or Sellers Agent		
Supplier VAT ID: *	12344xxxx		
Buyer Tax Agency Coded: *	Assigned by buyer or buyer's		
Buyer VAT ID: *	FR09876543		

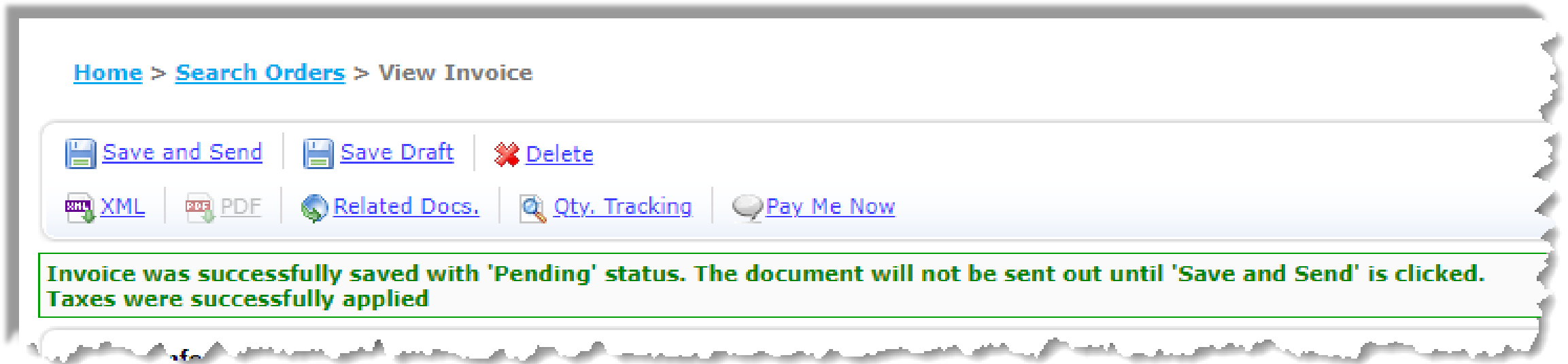
Choose **Exempt from Tax**

Choose **Yes - Tax Exempt**



Save Draft

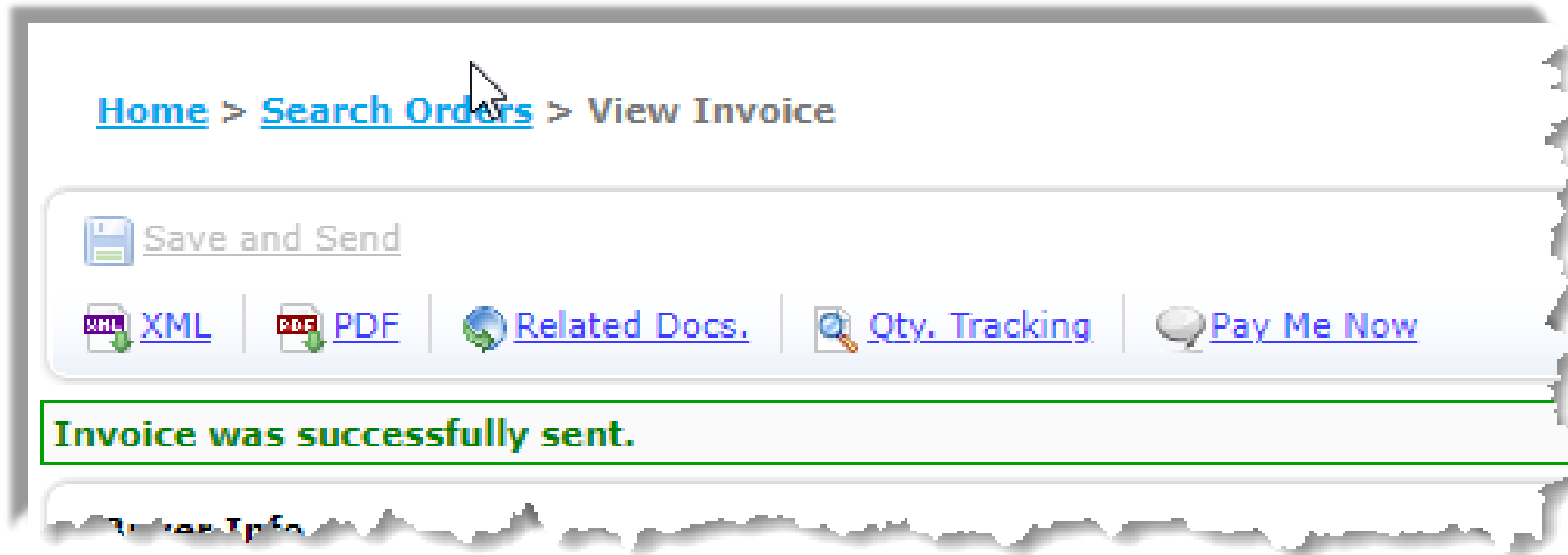
Click **Save Draft** to save an invoice and send it at a later time.



The screenshot shows a web interface for invoice management. At the top, there is a breadcrumb trail: [Home](#) > [Search Orders](#) > [View Invoice](#). Below this, there is a horizontal menu with several options: [Save and Send](#) (with a document icon), [Save Draft](#) (with a document icon), [Delete](#) (with a red 'X' icon), [XML](#) (with an XML icon), [PDF](#) (with a PDF icon), [Related Docs.](#) (with a globe icon), [Qty. Tracking](#) (with a magnifying glass icon), and [Pay Me Now](#) (with a speech bubble icon). Below the menu, a green-bordered box contains a success message: "Invoice was successfully saved with 'Pending' status. The document will not be sent out until 'Save and Send' is clicked. Taxes were successfully applied".

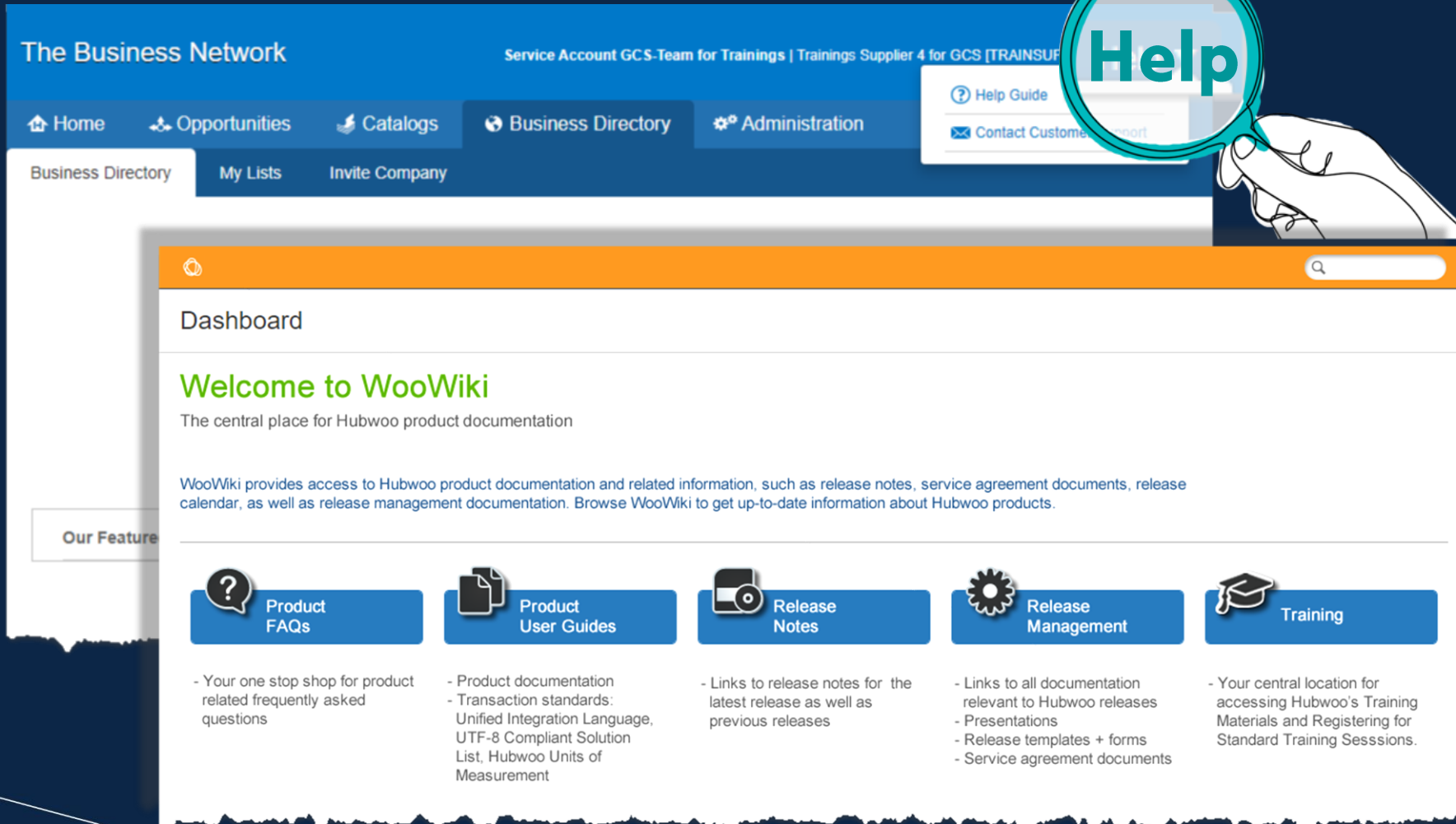
Save and Send

Click **Save and Send** to submit the invoice to the buyer.



A confirmation message will appear at the top of the page when the invoice has been sent to the buyer.

Additional Resources



The Business Network

Service Account GCS-Team for Trainings | Trainings Supplier 4 for GCS [TRAINSUF

Home Opportunities Catalogs Business Directory Administration

Business Directory My Lists Invite Company

Help Guide Contact Customer Support

Help

Dashboard

Welcome to WooWiki

The central place for Hubwoo product documentation

WooWiki provides access to Hubwoo product documentation and related information, such as release notes, service agreement documents, release calendar, as well as release management documentation. Browse WooWiki to get up-to-date information about Hubwoo products.

Our Features

- Product FAQs**
 - Your one stop shop for product related frequently asked questions
- Product User Guides**
 - Product documentation
 - Transaction standards: Unified Integration Language, UTF-8 Compliant Solution List, Hubwoo Units of Measurement
- Release Notes**
 - Links to release notes for the latest release as well as previous releases
- Release Management**
 - Links to all documentation relevant to Hubwoo releases
 - Presentations
 - Release templates + forms
 - Service agreement documents
- Training**
 - Your central location for accessing Hubwoo's Training Materials and Registering for Standard Training Sessions.

Menu Path: **The Business Network** > Help > Help Guide

Check the User Guides in Wiki for more comprehensive how-to instructions.



Proactis International Support

+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

suppliersupport@proactisservicedesk.com