Order Management

Standard Supplier Training

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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.

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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

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Topics
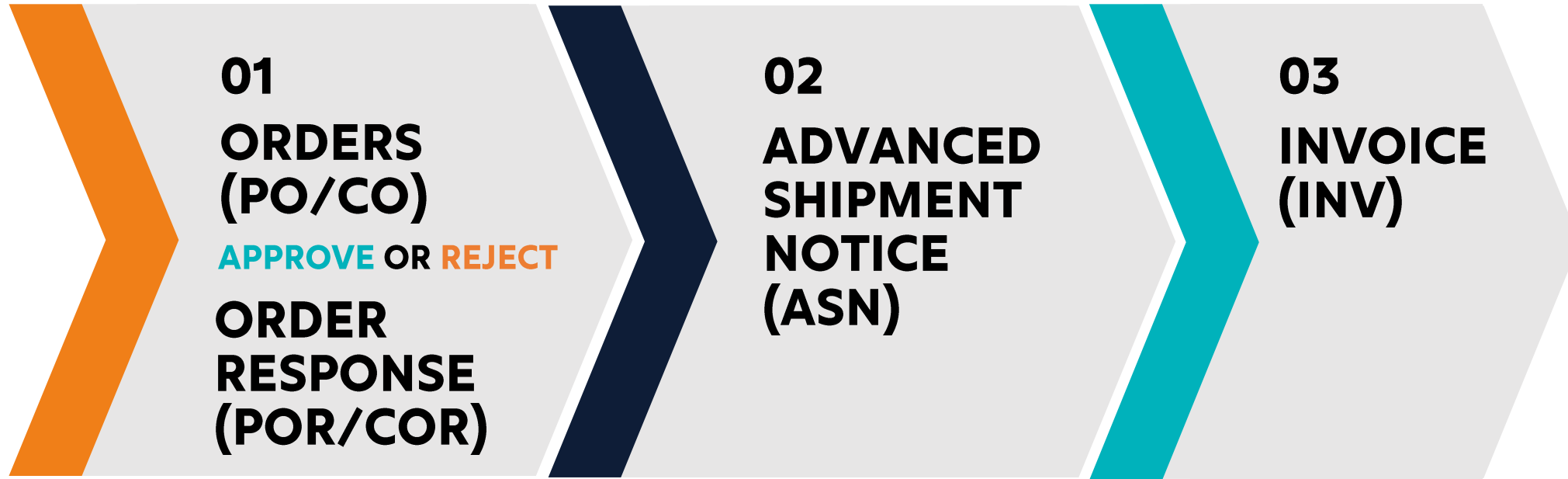
Welcome to the Order Management Standard Supplier Training.

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)

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Overview

BUYER

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

01
ORDERS (PO/CO)
APPROVE OR REJECT

ORDER RESPONSE (POR/COR)

02
ADVANCED SHIPMENT NOTICE (ASN)

03
INVOICE (INV)

ORDER MANAGEMENT | BASIC DOCUMENTS

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Login Page

Orders Tab

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

Order Page

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

Documents Tab and Folders

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

| Orders | Change Orders | ASNs | Invoices | Goods Receipts | Credit Advices |

📁 New Orders (32)
📁 Accepted Orders (1)
📁 Accepted with Changes Orders (2)
📁 Rejected Orders (0)
📁 Processing Orders (3)

Click **New Orders**.

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Search Page

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.

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

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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.

PDF Format

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

Quantity Tracking

This feature is used to:

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

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

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Orders

There are 2 ways to view Purchase Orders:

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

- **Orders** > **Overview** > **Orders**
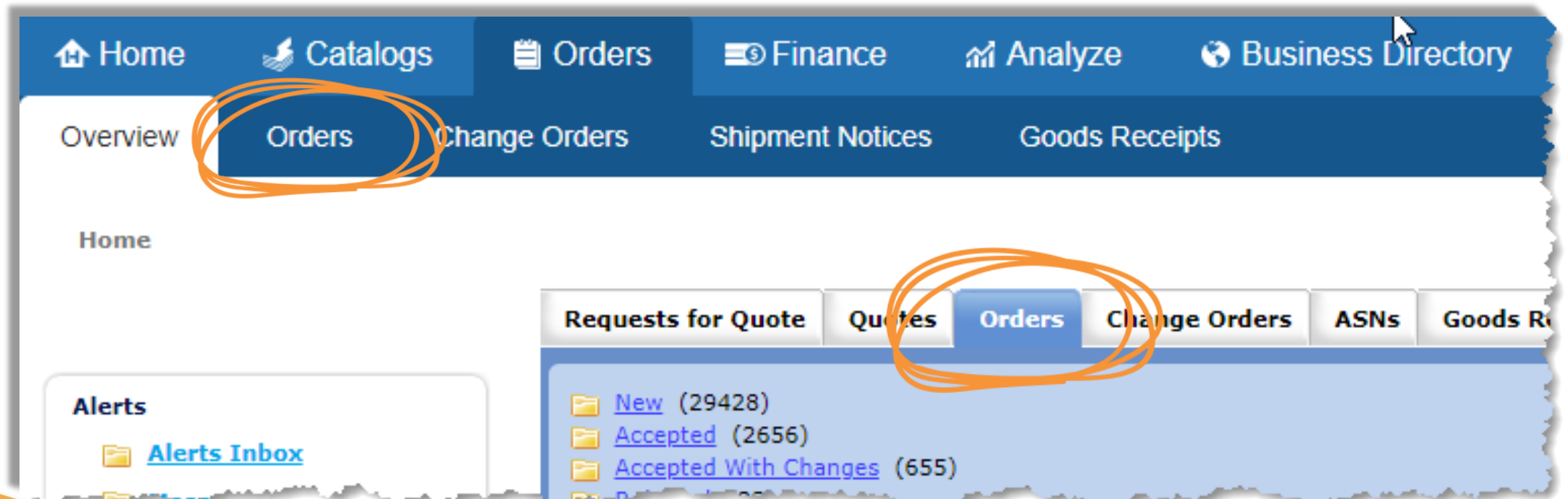
View an Order

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
☐	🛒	2000007960	Global Corp DEMO Paris	P142V0004-888888436	New	22-Jan-2022 07:00:00 PM	600.00 EUR		
☐	🛒	2000007950	Global Corp DEMO Paris	P142V0004-888888436	New	11-Dec-2021 07:00:00 PM	600.00 EUR		
☐	🛒	2000007940	Global Corp DEMO Paris	P142V0004-888888436	New	23-Oct-2021 06:00:00 PM	600.00 EUR		
☐	🛒	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:00 PM	600.00 EUR		
☐	🛒	2000007900	Global Corp DEMO Paris	P142V0004-888888436	New	14-Aug-2021 06:00:00 PM	600.00 EUR		
☐	🛒	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Accepted	12-Jun-2021 06:00:00 PM	100.00 EUR		

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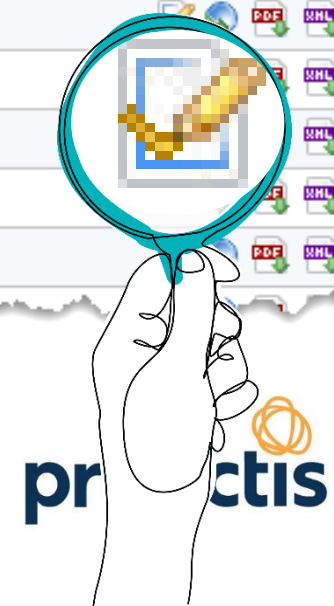
Order Details

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	Plant ID:	0000000117
Supplier Ref. No.: *		Status:	New
Supplier Delivery Date:		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
☐	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

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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.

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

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

Modify the quantity directly.

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.

Buyer Info
Ident: 888881001
Company Name: Test Buye
Street: 10777 Westheimer
City: Houston
Region: TX
Zip/Postal Code: 77042
Country: US

Buyer Order Contact:
Contact Identifier:
Contact name: Perry, Darryl
Telephone:
Email: dperry@hubwoo.com
Fax:

> **Supplier Reference Number** can be 16 characters, maximum.

Order Header

Order No.:   00069
Supplier Ref. No.: *
Supplier Delivery Date:

Plant ID: 0034001
Status: New
Requested Delivery Date: 25-Dec-2008 11:59:59 PM

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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.

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.

| Overview | Orders | Change Orders | Shipment Notices | Goods Receipts | Cart |

Home > **Search Orders** > View Order

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

💾 Save and Send | 📄 Save | 🛒 Add to Basket | ⊗ Reject | 📄 Build ASN | 📄 Build Invoice ▾

📄 XML | 📄 PDF | 🌐 Related Docs. | 🔍 Qty. Tracking

⚠ ...d Information

2. Click **Save and Send.**

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Reject an Order Line Only

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

Open the Order Line, and click the **Reject and Return to PO**

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

Click **Save and Send**.

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**
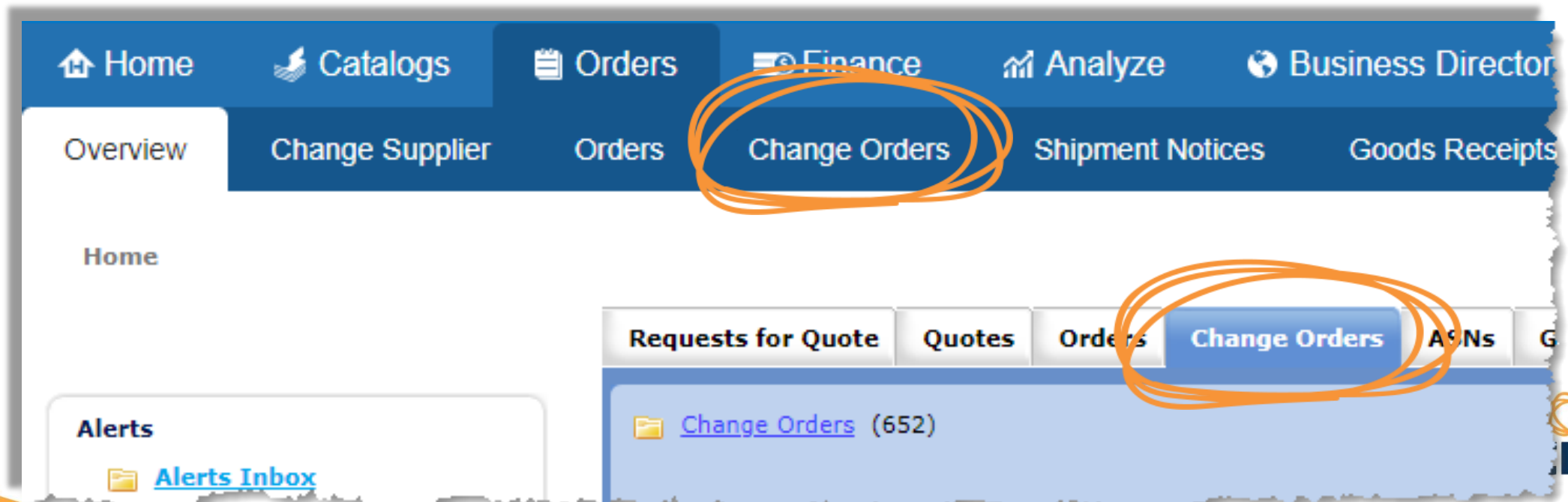
CO Changes

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

◎ **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

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1. Create an ASN From an Order

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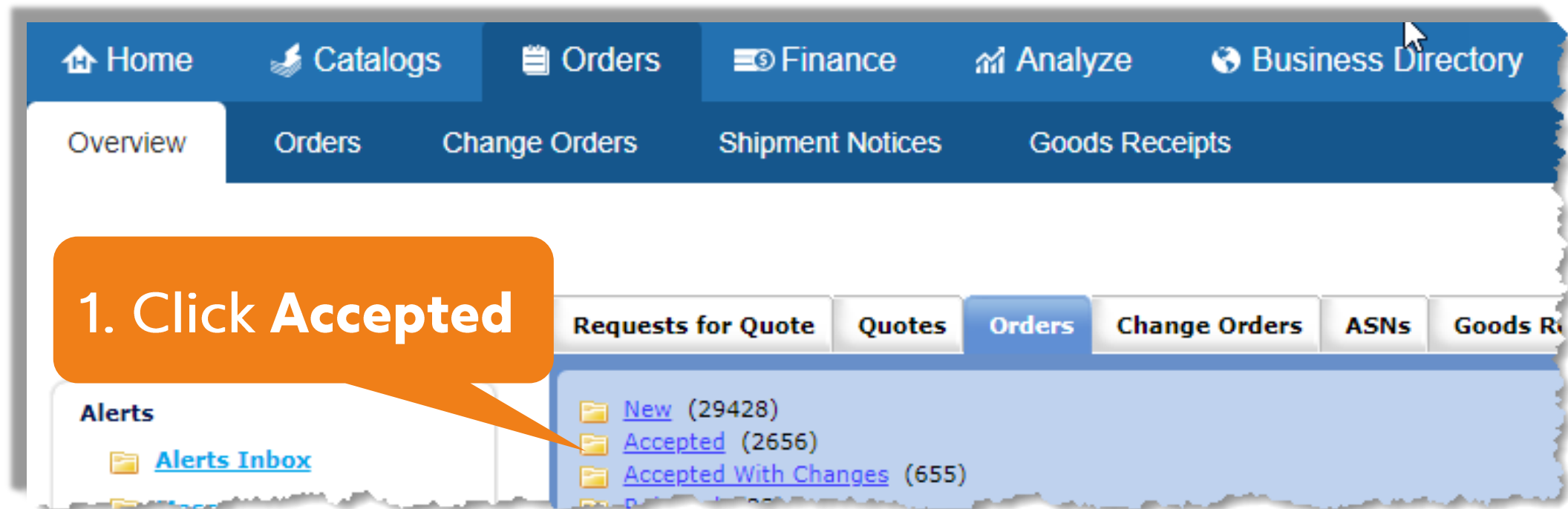
1. Create an ASN From an Order

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

2. Select an Order

3. Click Build ASN

Search Results

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

Build Debit Invoice
Build Credit Invoice

	PO Number	Buyer	Account Code	Status	
☑ 🛒	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:00 PM
☐ 🛒	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Accepted	-Jun-2021 06:00:00 PM

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2. Create an ASN From an Order Line

Open PO and then select the Order Line Item

2. Select an Order Line

3. Click Build ASN

ASN Details

4. Fill out all mandatory fields. *

Add a Package

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

5. Click **Add New Package**

6. Fill out the **Package ID, Marker** and **Type**

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

Finalize and Send the ASN

9. Click Save and Send

8. Click Return to ASN

Home > Search Orders > View ASN > View ASN Package

Save | Return to ASN |

Package D

Home > Search Orders > View ASN

Save and Send | Save Draft | Delete

XML | PDF |

ASN Details

Home > Search Orders > View ASN

Save and Send | Save Draft | Delete | Copy

XML | PDF | Related Docs. | Qty. Tracking
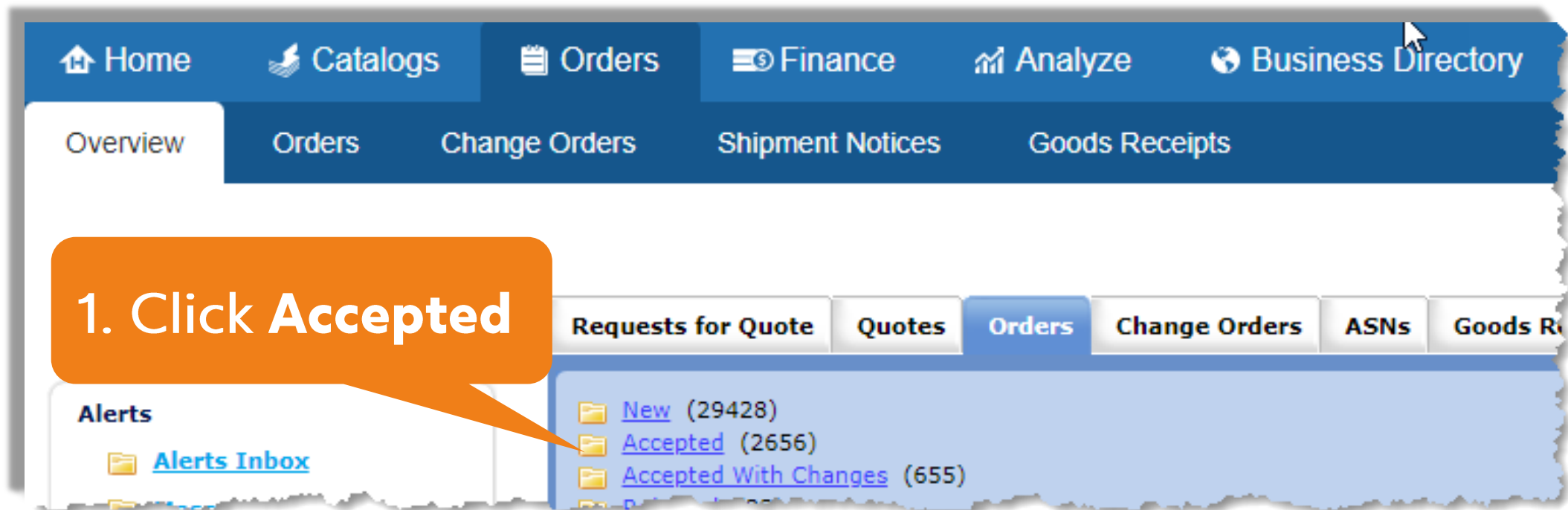
ASN was successfully sent.

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

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Invoice

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

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1. Create an Invoice From an Order

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

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 ASN | Build Invoice ▼

Build Debit Invoice
Build Credit Invoice

	PO Number	Buyer	Account Code	Status	O
☑ 🛒	2000007920	Global Corp DEMO Paris	P142V0004-888888436	Accepted	11-Sep-2021 06:00:0 PM
☐ 🛒	2000007870	Global Corp DEMO Paris	P142V0004-888888436	Ac...d	12-Jun-2021 06:00:00 PM

3. Click Build Invoice > Build Debit Invoice

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1. Create an Invoice From an Order

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

2. Create an Invoice From an Order Line

Open PO and then select the Order Line Item

Order Header

Order No.:

Supplier Ref. No.: *

2. Select an Order Line

Supplier Delivery Date:

Plant ID: 0000000013

Status: Accepted

Requested Delivery Date:

Order Lines

☐ Expand All | S̶e̶l̶e̶c̶t̶ A̶l̶l̶ | Clear All | ✚ Add Lines | 🛒 Add to Basket | 📄 Build ASN | 📄 Build Invoice ▼

Build Debit Invoice
Build Credit Invoice

	No.	Part No.	Description	Status	Requested D...	...pplier Delivery Date *	UOM	Quantity *	Unit Price *
☑	0000000001	Seller: 332-5699 Buyer: N/A	VENTILATEUR TANGENTIE	Accepted	13-Jun- ...21 06:00:00 PM	1...Jun... ...1 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 ▼

3. Click Build Invoice > Build Debit Invoice

Invoicing

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

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.

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
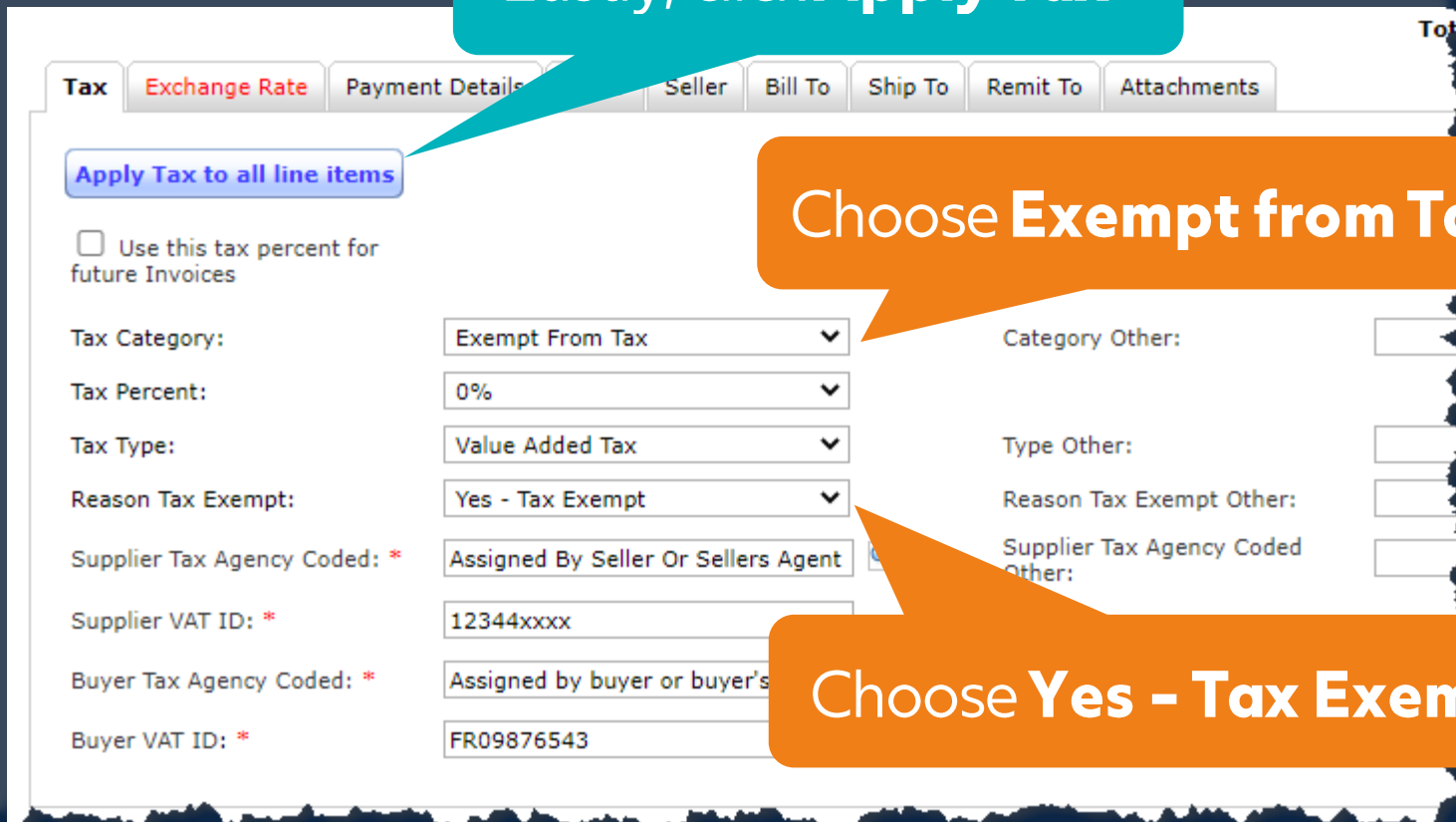
Tax | Exchange Rate | Payment Details | Buyer | Seller

Apply Tax to all line items

☐ Use this tax percent for future Invoices

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

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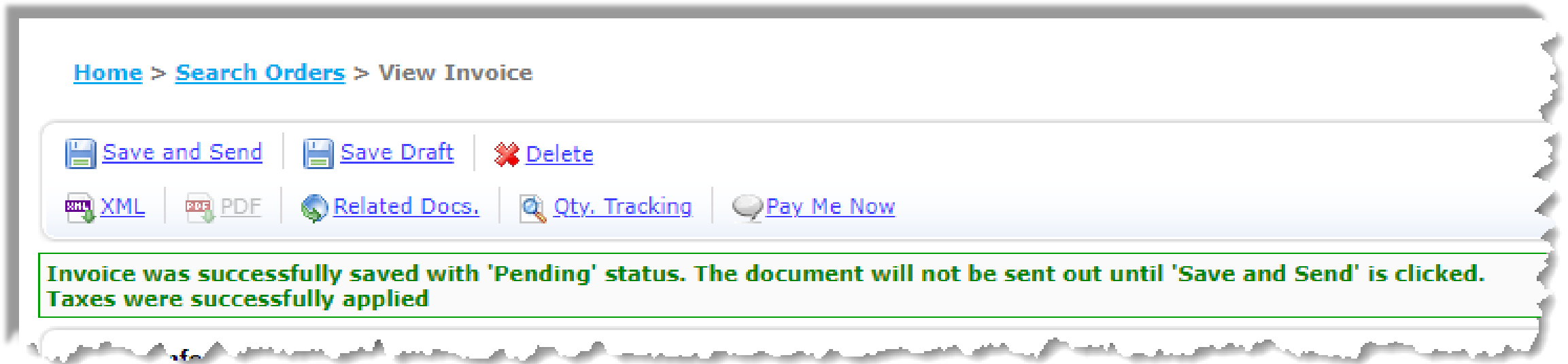
Save Draft

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

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

Help

- ? Help Guide
- ✉ Contact Customer Support

🏠 Home   ⚒ Opportunities   🧹 Catalogs   🌐 Business Directory   ⚙ Administration

Business Directory   My Lists   Invite Company

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 Feature

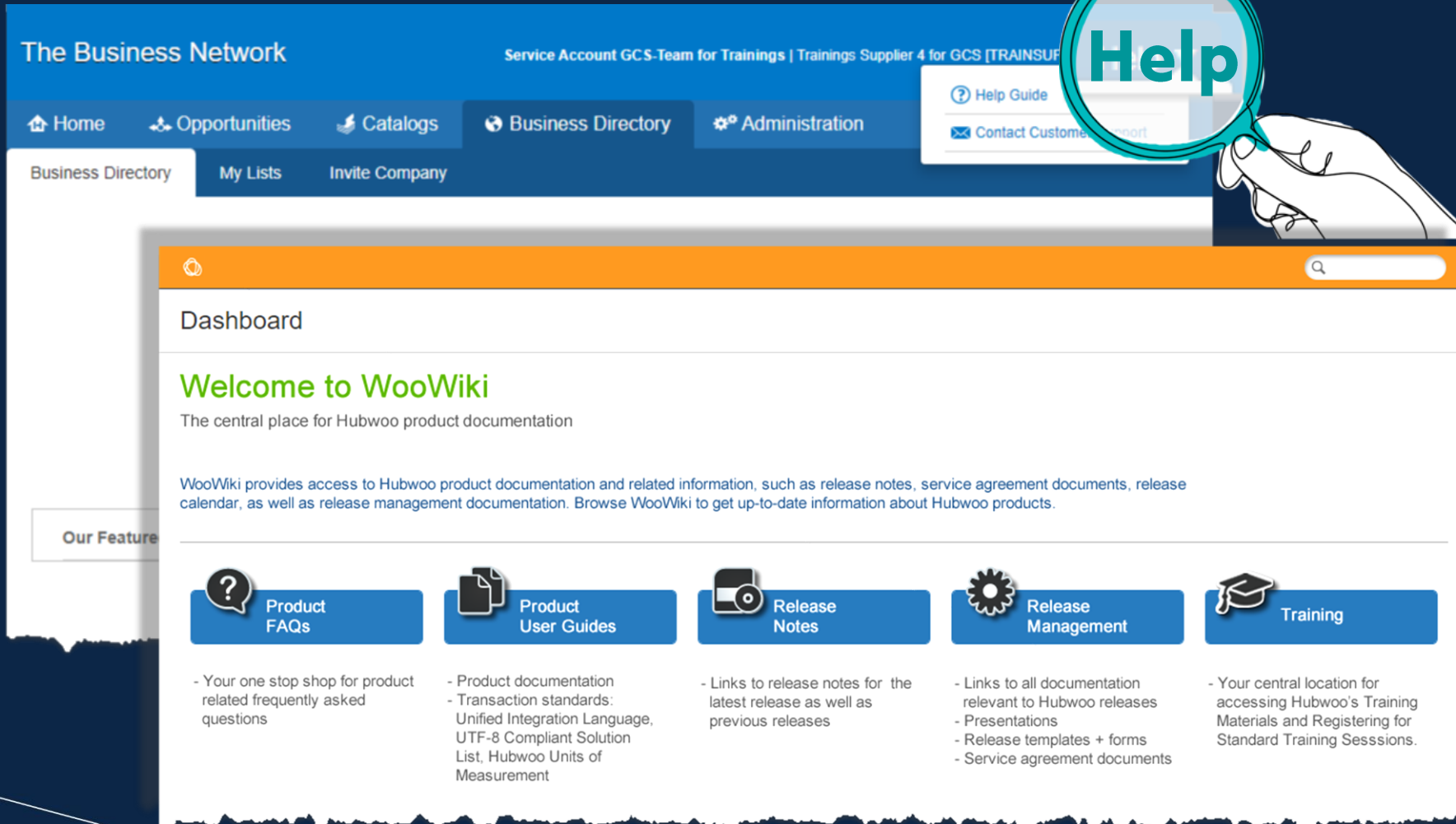| ? Product FAQs	🗎 Product User Guides	💽 Release Notes	⚙ Release Management	🎓 Training
- Your one stop shop for product related frequently asked questions	- Product documentation - Transaction standards: Unified Integration Language, UTF-8 Compliant Solution List, Hubwoo Units of Measurement	- Links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

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

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

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Let's talk

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