Schneider Electric

Training documentation for suppliers

Orders and Goods Receipts

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1 About this manual

This handout shall help suppliers of Schneider Electric to understand newly introduced supplier portal, SSP SCM 2.0, in regards to Orders and Goods Receipts.

1.1 Intended Audience

Schneider Electric suppliers

1.2 Typographical and Graphical Conventions

The following typographical conventions are used throughout this manual:

Example	Meaning
Screen Text	Text visible in the user interface becomes **bold**.
Reference	References are displayed in *italics.*

The graphical convention is used throughout the manual:

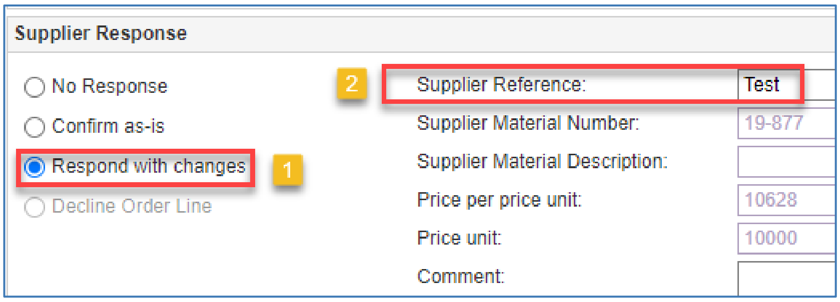


Figure: Red borders are used to indicate special areas. Yellow numbers are used to indicate steps. Those are not part of the UI.

1.3 Abbreviation

Abbreviation	Meaning
ASN	Advanced Shipping Notification
EDI	Electronic data interchange
DESADV	Despatch Advice
DTM	Download Template Manager
GR	Goods Receipt
LI	Line item(s)
PO	Purchase Order
SE	Schneider Electric
SO	SupplyOn

2 Introduction

The electronic ordering process via SupplyOn is efficient, transparent and quick. It replaces the traditional, at times paper-intensive transactions. There data had to be manually entered at numerous places and the current processing status of the individual transactions was not always identifiable. With SupplyOn that process is supported by the system throughout - in a central system, to which all parties involved have access.

With this new order process via SupplyOn, you can receive, check and confirm purchase orders.

How do you benefit from the new ordering process via SupplyOn?

- No more manual input of orders
- All processes run via a central cockpit, offering a complete overview at any time as well as a single view on the specific status of any process individually
- Simple creation of order confirmations thanks to preassigned fields and electronic dispatch at just a mouse click

Figure 1: SSP SCM 2.0 process

You as a supplier and your customer SE will collaborate along the purchasing process according to these steps:

Step 1 – SE sends out a new Purchase Order (PO) from their ERP to SO

Step 2 – Supplier can review new PO in SO

Step 3 – Supplier confirms the PO, which is sent back to SE.

Step 4 – In case of re-scheduling, supplier gets a changed PO from SE, which he then confirms.

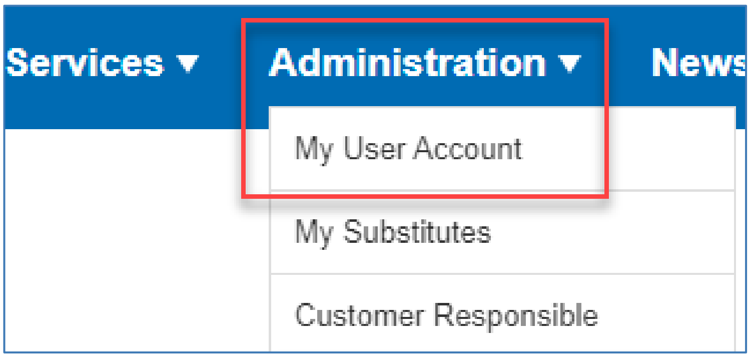
Step 5 – Subsequent processes (e.g. creating Invoice) can be started as soon as first confirmation is sent.

Step 6 – Receipt status will be shown via the Goods Receipt (GR) screen.

3 Setup in SupplyOn WebEDI

3.1 Roles and Rights

Basic information about your user account, its roles and rights are visible under Administration – My User Account.



As soon as you click here, you will see basic information like your username, email address etc.

Of course, you can correct this information if there is something wrong here.

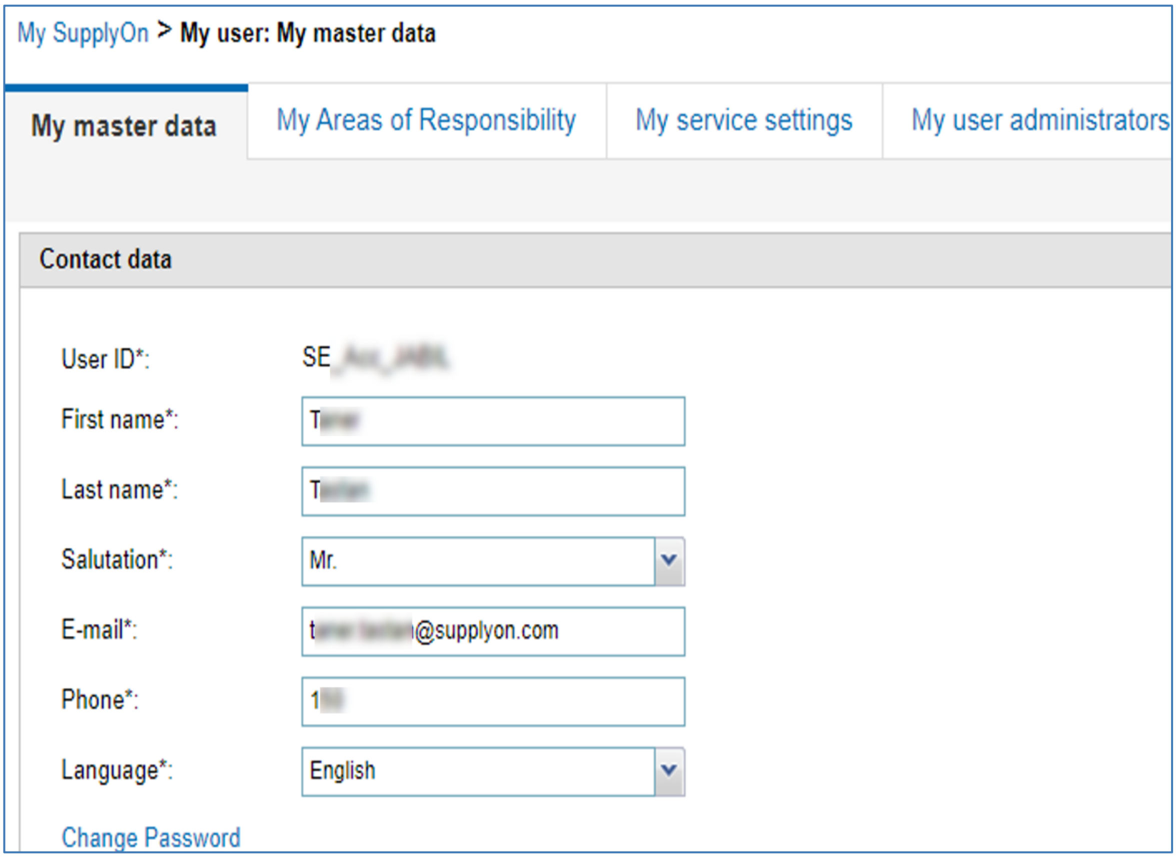


Figure 2: My User Account overview

Under the tab My Areas of Responsibility you can see what actions your user is authorized to do.

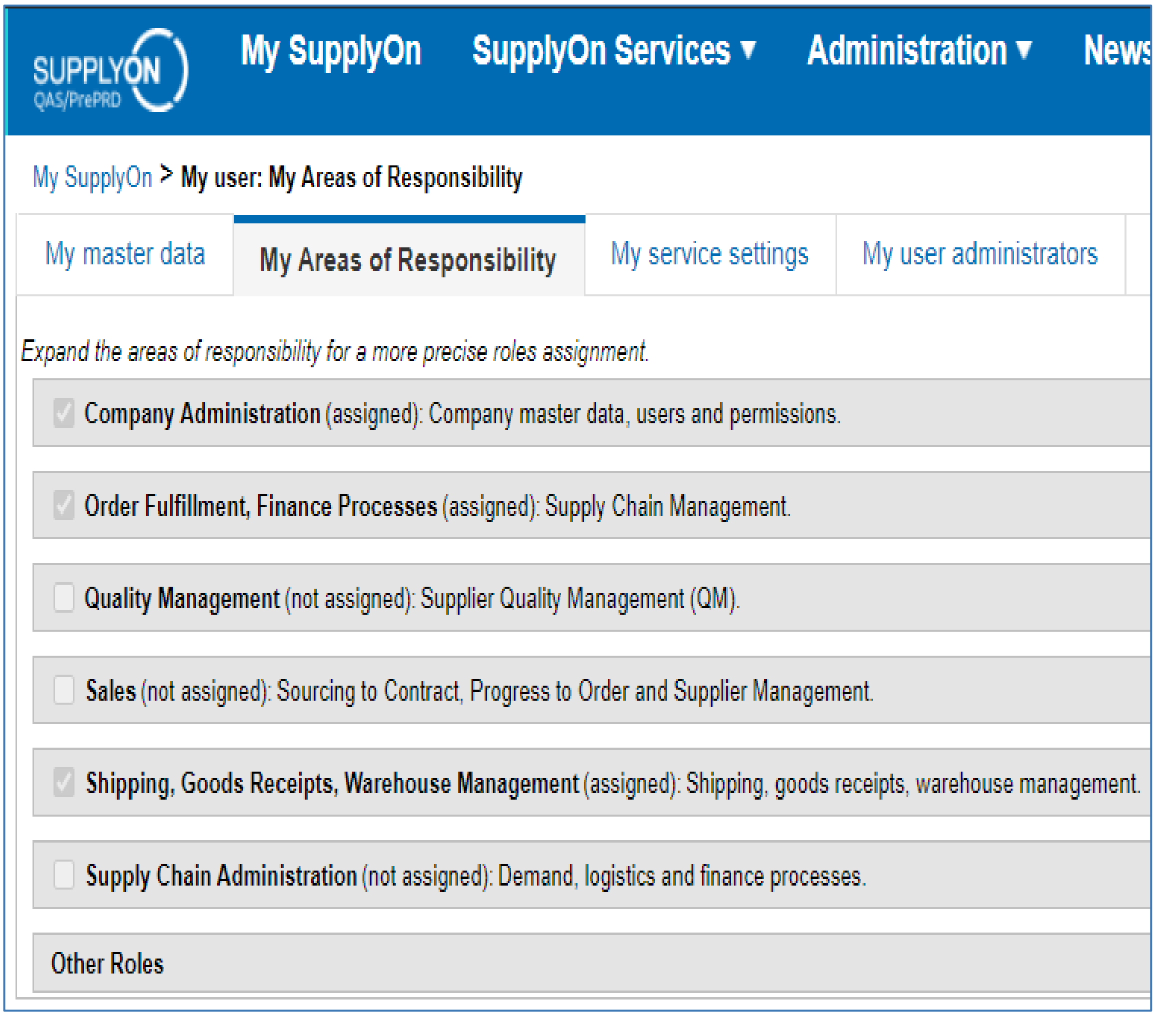
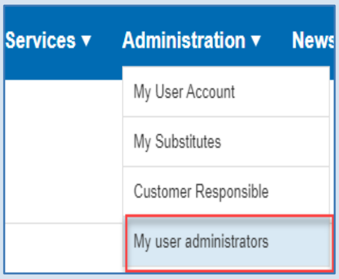


Figure 3: Areas of responsibility

Which areas of responsibility you will be unlocked and which roles you will receive depends on your user administrator. Only this administrator is capable of creating users or manage roles and rights.

Note

By clicking on Administration – My user administrators you are informed about your company admins.



These admins will get an interactive tour about the functionalities of user management.

To be able to commit the actions of this guide, at least the following roles in the areas of responsibility (marked in grey) are required:

Order Fulfillment, Finance Processes

WebEDISellerPO:

✓ Access to purchase orders.

WebEDISellerPO_OR:

✓ Access purchase orders and order confirmations.

WebEDISellerDTM:

✓ Access to DTM UI for configuration of downloads.

Shipping, Goods Receipts, Warehouse Management

WebEDISellerGRRead:

✓ Read access to the Goods Receipt screen.

At least one of the suppliers users should have the following role:

Supply Chain Administration

WebEDISellerAdmin

✓ Extensive authorities over the WebEDI and various, unlocked applications

3.2 Dashboard

WebEDI / VMI is the SupplyOn service, which enables you to process orders and other processes (Advanced Shipping Notification, Invoicing, …) efficiently and easily.

1. Open **WebEDI /VMI**

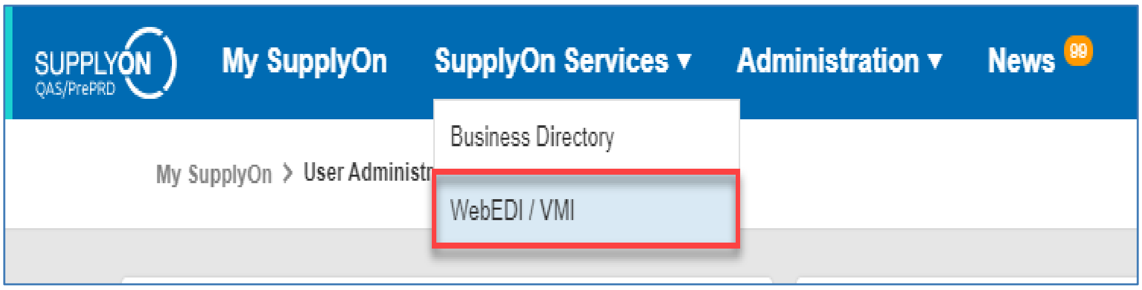


Figure 4 : Access WebEDI / VMI

2. The **Logistic & Finance** Dashboard is displayed

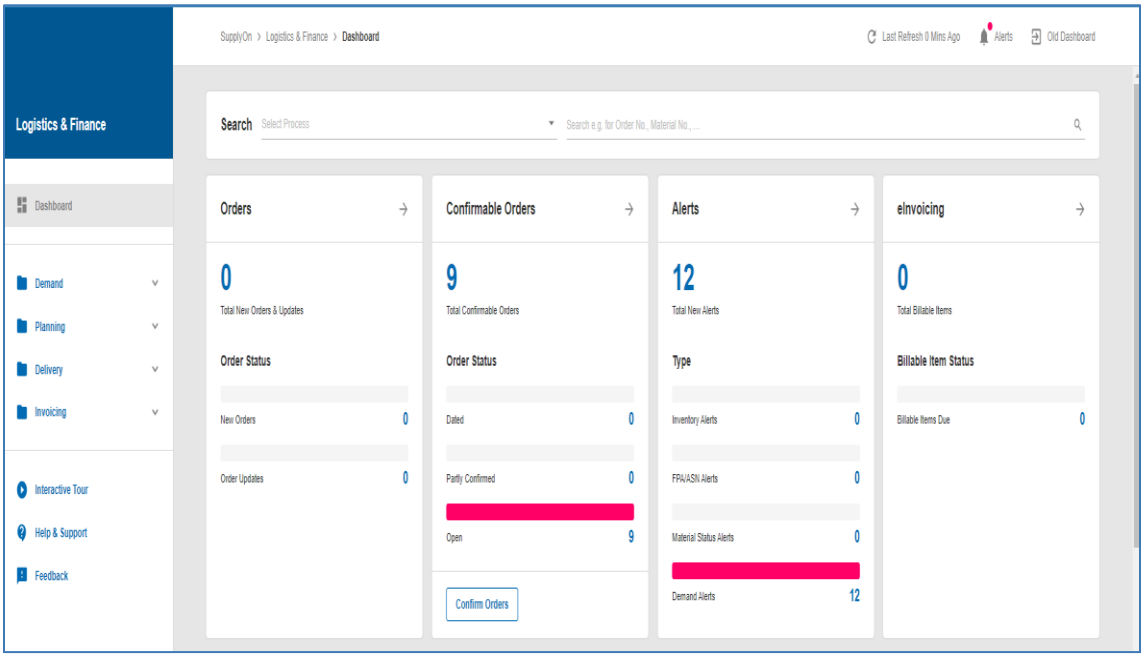


Figure 5 : Logistic & Finance Dashboard

The Dashboard shows at a glance all relevant information for you and is the central point of orientation for your processes. Here you see your open tasks. The tiles are only displayed if the related user rights have been assigned.

Note

By clicking on **Interactive Tour** on the lower left side of the dashboard, you will be guided through the User Interface (UI). At initial login this will be opened automatically as a pop up.

3.3 Creating default view

In order to personalize your view on various overviews like for PO or GR, you have different options:

1. Columns can be re-arranged in their order. To do so, left-click and hold the desired column and draw it to the new spot. By releasing the left-click, the column will be re-arranged to the new spot.
2. It is also possible to add or remove different columns from your current view. To add new columns, click on the drop-down arrow next to a random column and move your mouse cursor over to **Columns**. You can now tick the boxes in front of the columns which should be added to your view.
3. The same is possible for setting **filters** within the displayed columns.
4. In order to save your personalized view, type in a fitting name for your view and then click on **Create new** in the drop-down menu for **Manage view**. After that, you will be able to select the saved view from the drop-down menu as **Default View** for your next login.

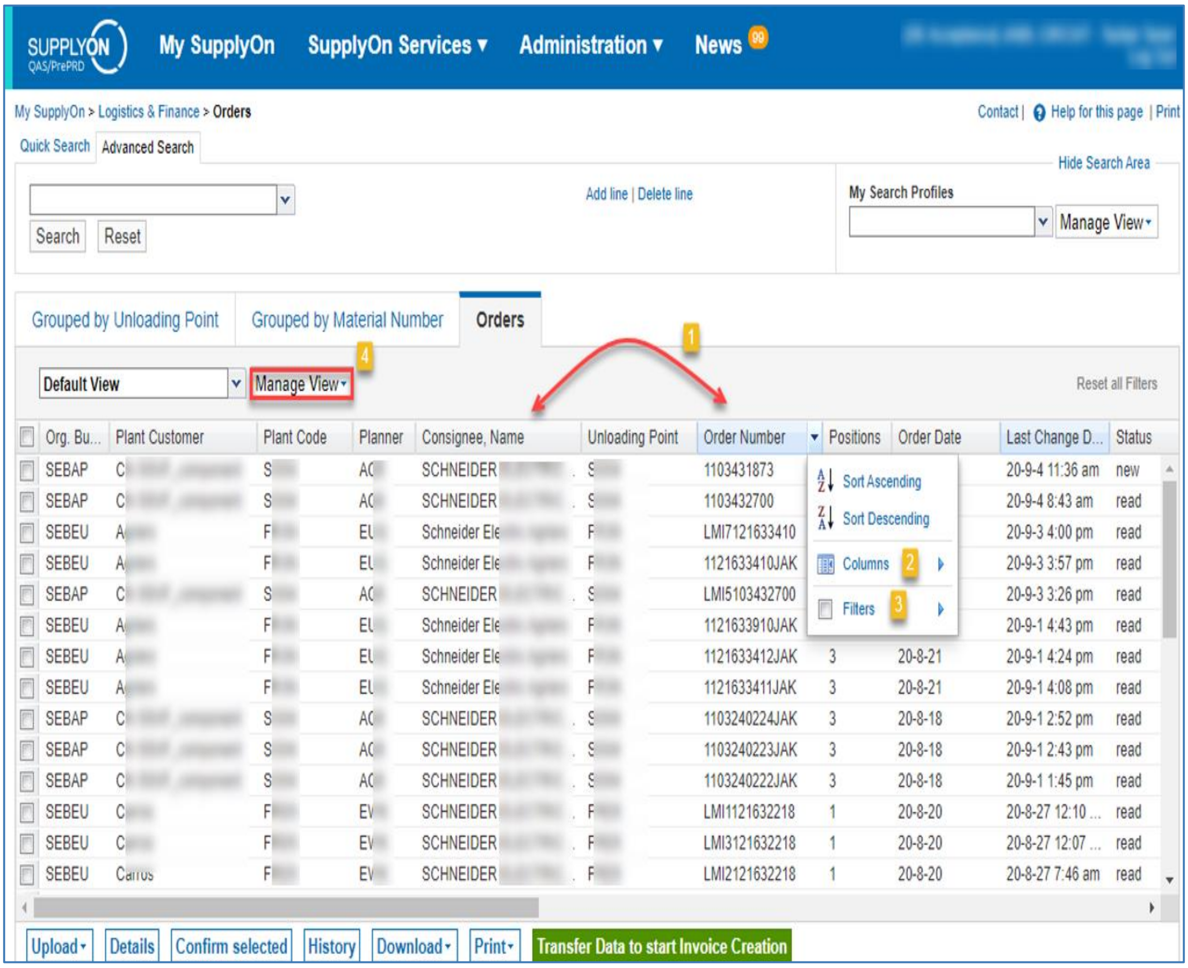
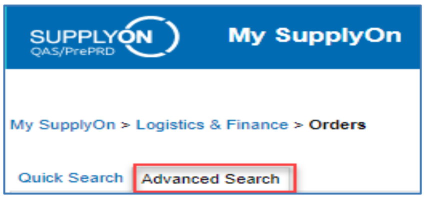


Figure 6 : Orders Overview screen

3.4 Creating Search Profiles

Which profile is recommended for my use case and how do I save profiles?

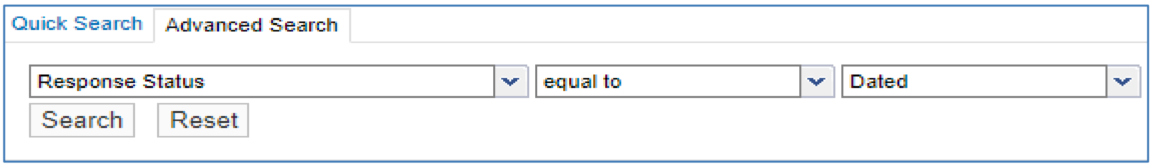
Click on **Advanced Search** on the PO Overview screen. This is the starting point to create new profiles for your specific use cases.



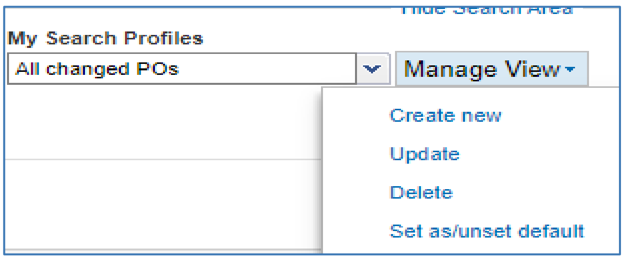
Following profiles are recommended:

1. For downloading POs, that have been changed by your customer (change of requested delivery date or quantity), you can save following profile:

   Response Status = Dated



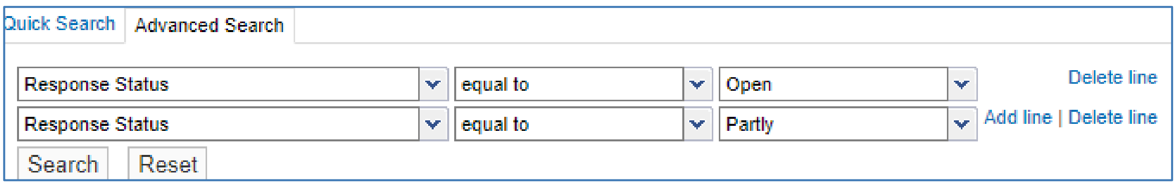
   Once filtered, insert a name for this search profile, e.g. “All changed POs” and click on Create new.



   A **Profile created** message will pop-up. If desired, this profile can be **set as default**.

2. For downloading POs, which have not yet been fully confirmed, apply these filters:

   Response Status = Open
   Response Status = Partly



Note: By clicking on **Add line**, your search profile gets more accurate by adding more filters!

3.5 Creating customized Alerts

General speaking, in the Dashboard you receive an overview of all alerts generated by the system. To receive an overview of all messages for which an overdue or deviating alert has been created, click on the arrow at the **Alerts** tile.

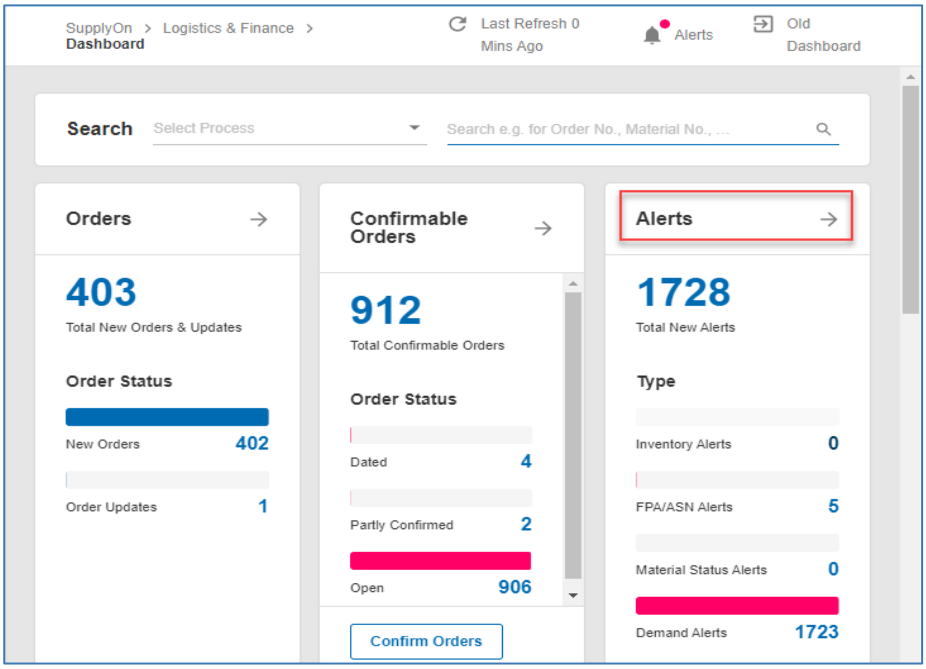


Figure 7: Access to alerts screen

Choose the desired tab, for which you would like to set alerts (**Demand alerts** in the context of the purchasing process). Now you can enter your desired criteria for the search function under **Advanced Search**.
In order to save your chosen search criteria, type in a fitting name on the right-hand side of the page, **My Search Profiles**. You can save it by selecting **Create new** from the drop-down menu for **Manage View** (exactly as described at [creating new profiles](#)).

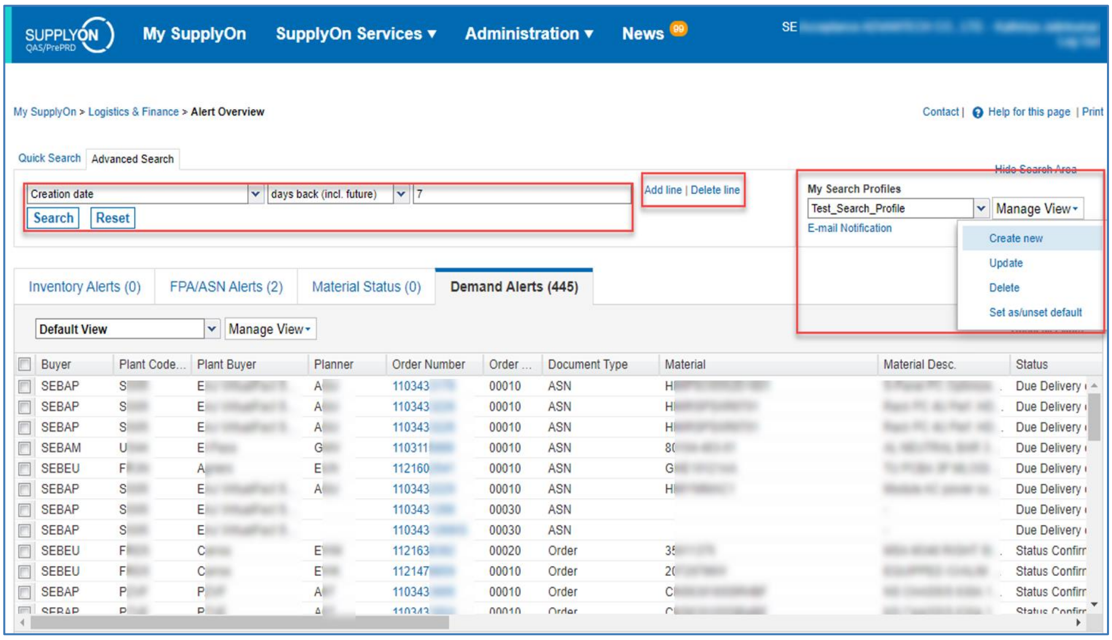
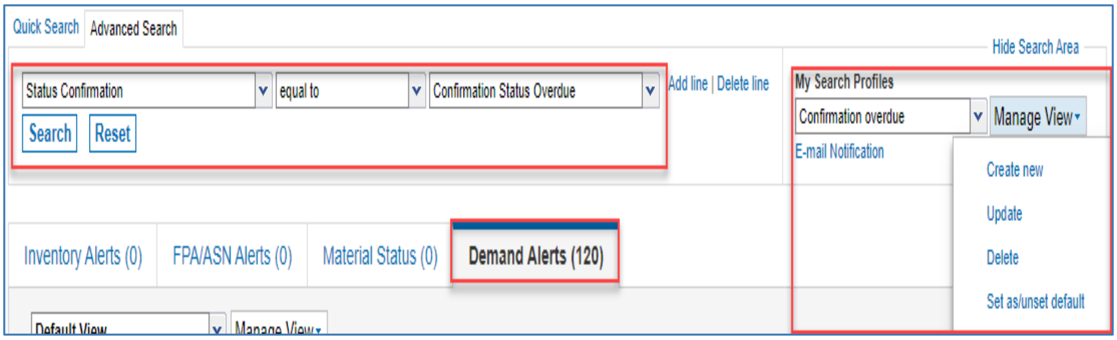


Figure 8: Alerts screen

Which alert profile is recommended for me and how do I save it?

In order to receive alerts for order positions, where order confirmation is overdue, you have to apply a filter for **Status Confirmation = Confirmation Status Overdue** in the **Demand Alerts tab.** Afterwards insert a name for that specific filter in the **My Search Profile** field and click on **Create New.**



If you click on "E-Mail Notification" underneath the recently-created view, you can set up notifications for your customized search. After choosing "Active" and clicking on "Save", the e-mail function is activated according to your chosen criteria.

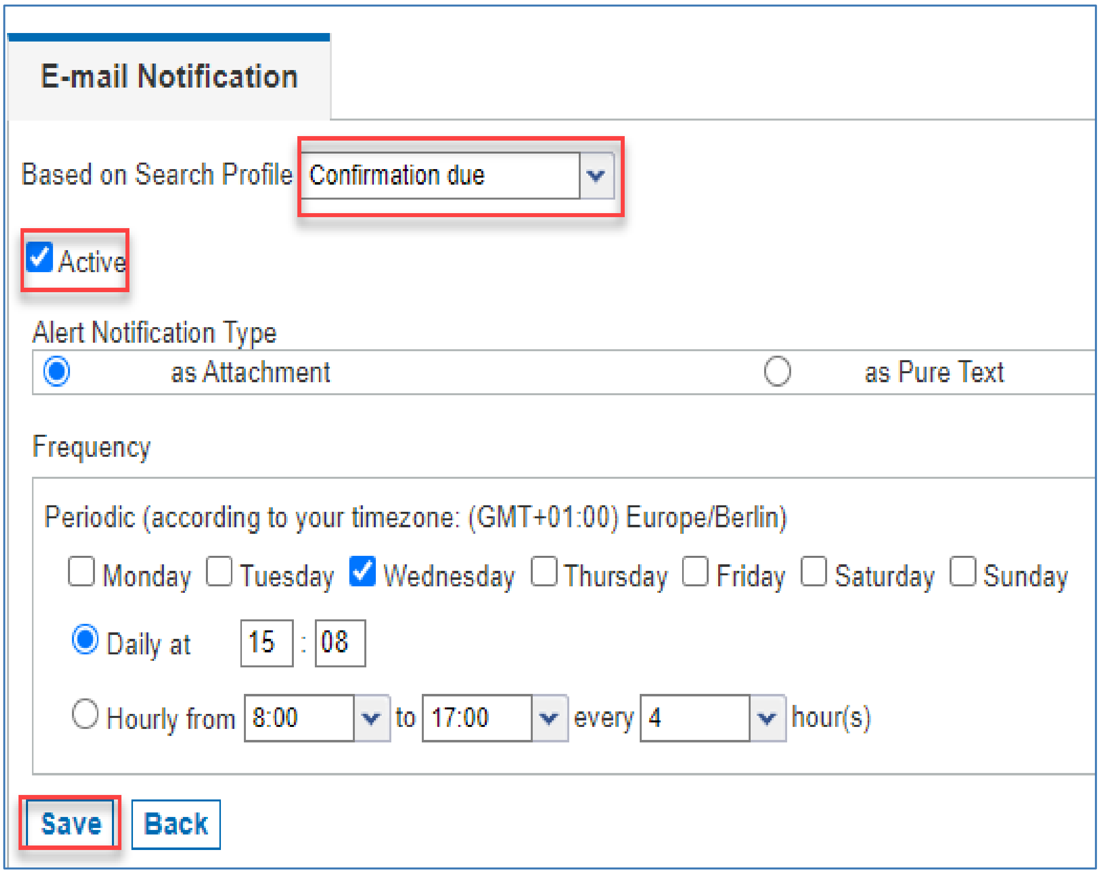
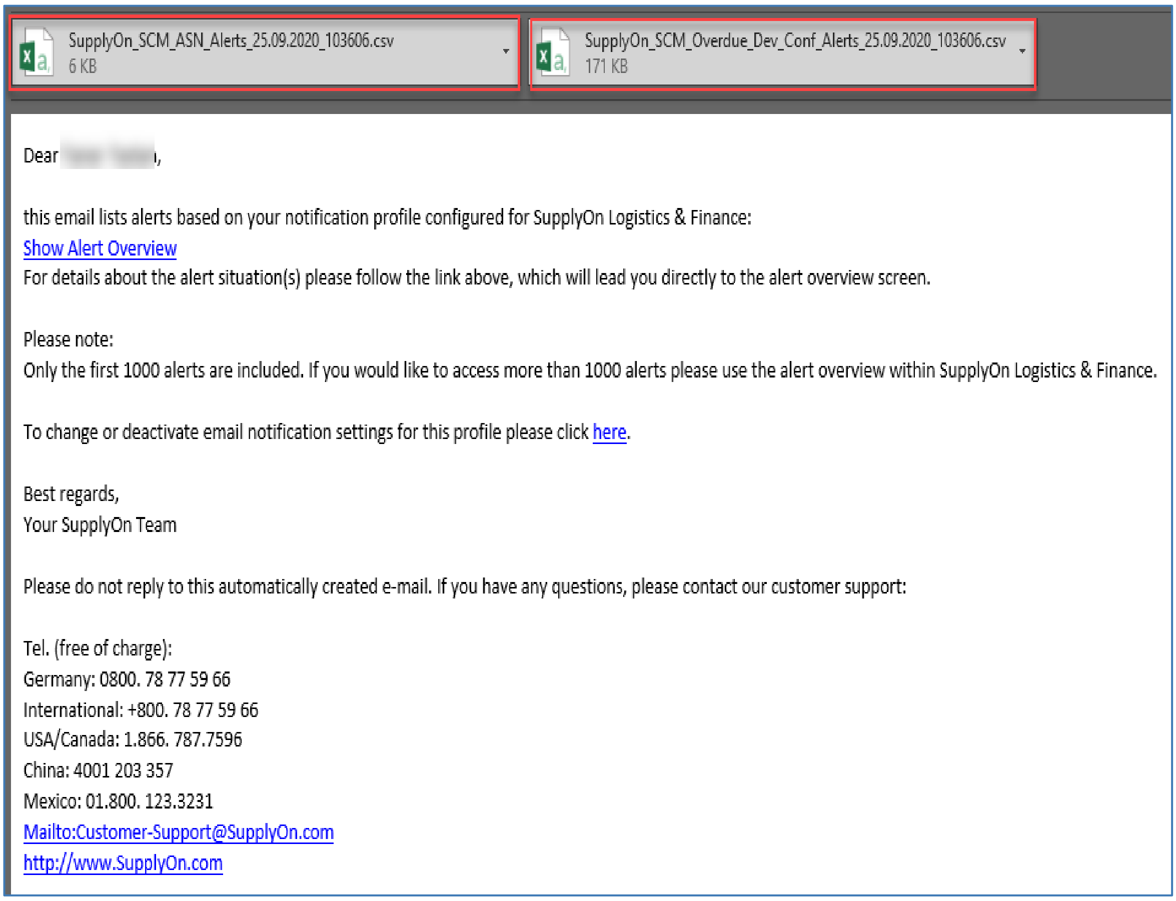


Figure 9: Setting up a mail notification for a specific alert

The mail you will receive looks as follows, e.g.:



SupplyOn_SCM_ASN_Alerts_25.09.2020_103606.csv
6 KB

SupplyOn_SCM_Overdue_Dev_Conf_Alerts_25.09.2020_103606.csv
171 KB

Dear [illegible],

this email lists alerts based on your notification profile configured for SupplyOn Logistics & Finance:
[Show Alert Overview]
For details about the alert situation(s) please follow the link above, which will lead you directly to the alert overview screen.

Please note:
Only the first 1000 alerts are included. If you would like to access more than 1000 alerts please use the alert overview within SupplyOn Logistics & Finance.

To change or deactivate email notification settings for this profile please click here.

Best regards,
Your SupplyOn Team

Please do not reply to this automatically created e-mail. If you have any questions, please contact our customer support:

Tel. (free of charge):
Germany: 0800. 78 77 59 66
International: +800. 78 77 59 66
USA/Canada: 1.866. 787.7596
China: 4001 203 357
Mexico: 01.800. 123.3231
Mailto:Customer-Support@SupplyOn.com
http://www.SupplyOn.com

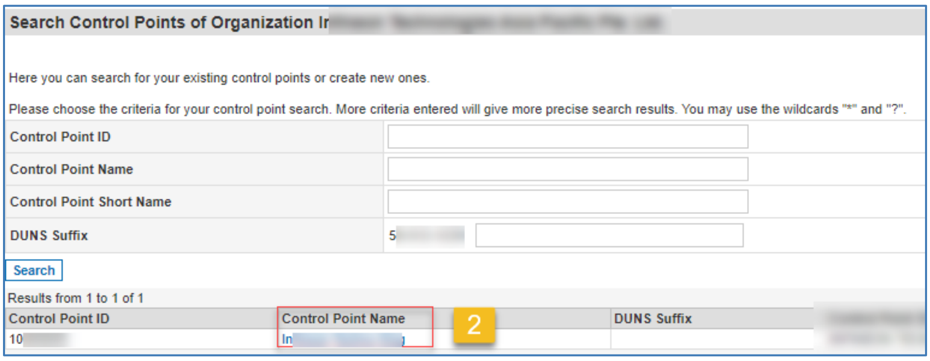
Figure 10: Example for alert-mail

3.6 Disabling alerts (for new and changed Purchase Orders)

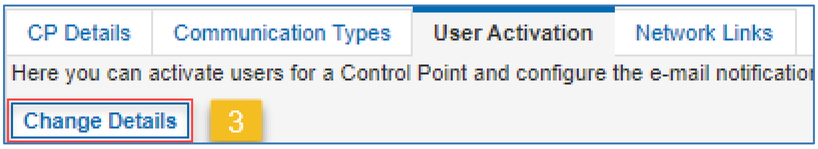
There are also standard alerts outside of this Alert Manager (see Mail notification for new PO and Mail notification for changed PO) which only the user administrator can turn on and off as follows:

1) Once logged in as user administrator click on **Administration > Logistics Settings**.

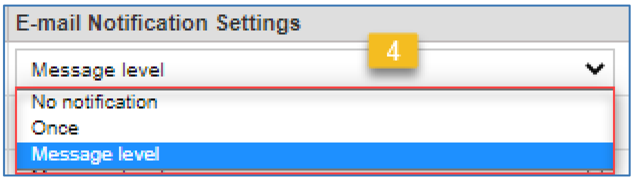
2) Click on the **Control Point Name** in the table.



3) In the **User activation** tab you can now see all users activated in this Control Point.
Click on **Change details**.



4) Now you can set to set the type of e-mail notification.
You can choose between **no notification**, **once** notification and **message level** notification.



Note:

No notification: Although new messages arrive, you will not receive an e-mail notification.

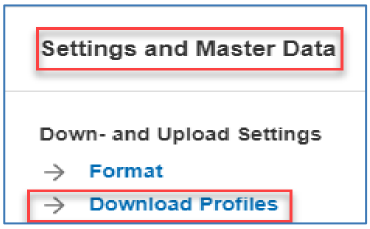
Once: Once you log on to SO the notification will be sent (only once during login time).

Notification at message level: As soon as a new message is received, you will be informed by e-mail.

3.7 Download Template Manager and formats

The Download Template Manager enables the user to configure his download template with the relevant information for various applications according to his wishes.

Via the dashboard you access the Down- and Upload Settings:



This can be done as follows:

1. Select Download Profile to modify
2. Additional fields to be added to your customized template
3. Current content of your selected Download profile
4. Buttons to change Download profile (Add/Remove)
5. Functionality buttons to e.g. delete or save a download profile

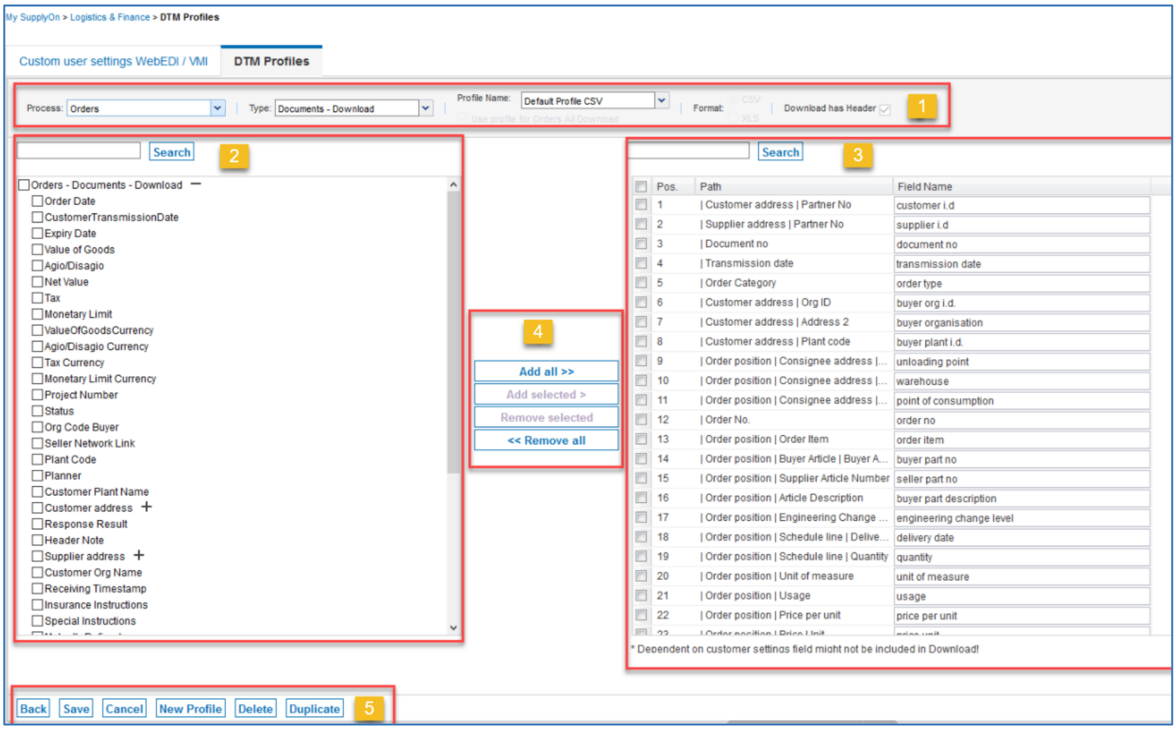
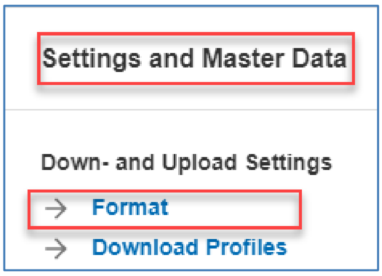


Figure 11: DTM Profiles

Via the Dashboard you receive the Format settings:



Depending on your preferences or local circumstances, formats can be adjusted here, for example the date format:

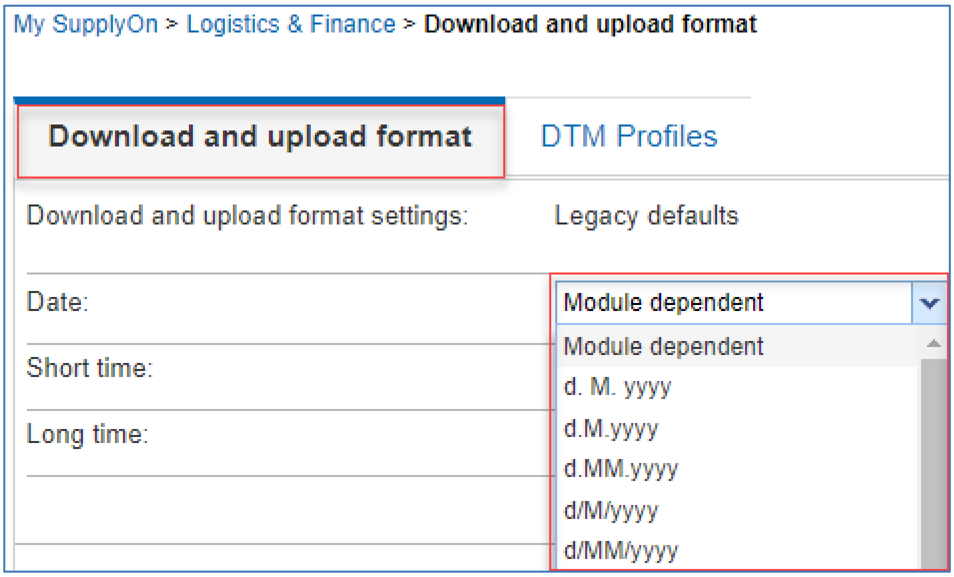


Figure 12: Adjusting the date format

4 Purchase Orders

The focus of following pages is on the purchasing process.

If you want to view and confirm orders, the following user roles are required.

Area of responsibility: Order Fulfillment, Finance Processes

WebEDISellerPO:

✓ Access to purchase orders.

WebEDISellerPO_OR:

✓ Access purchase orders and order confirmations.

4.1 New Purchase Order

4.1.1 Accessing New Purchase Order

As soon as you receive a new order from your customer, a real-time message will be sent to your email address. Starting from here the new PO can be registered from you as a supplier.

Dear SupplyOn user,

You have received a Purchase Order from Schneider Electric NAM

Customer:	Schneider Electric NAM [illegible]
Material number:	80[illegible]
Order Number:	1104116502
Contact:	Ro[illegible]

Please use the following link to log on to SupplyOn WebEDI and go directly to the

- Details: Click here
- WebEDI process overview page Click here

This mail was as well sent to the following recipients inside your organization:

- Sl[illegible]
- ar[illegible]
- A[illegible]

Figure 13: Mail notification for new PO

There are several ways to access the new PO.

You have to logon to SO upfront (https://platform.application.prd.supplyon.com/logon/logonServlet)

Please enter your user credentials. Once logged in you have several possibilities to access the new PO:

- By clicking on the link in the mail.
- If you click on **New Orders**, you will directly see the orders which are new. (Filters applied: **Status = New**; **History = False**)

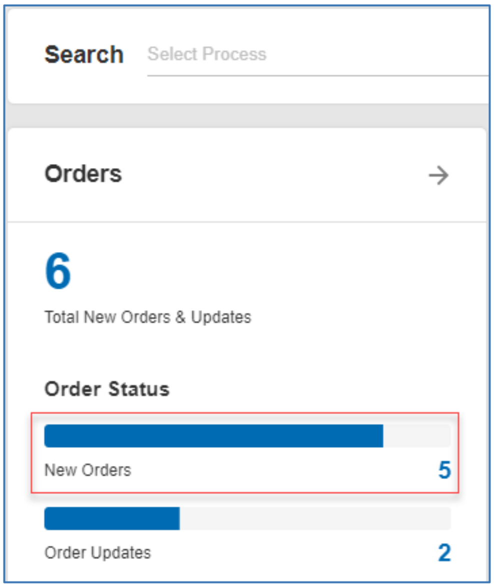


Figure 14 : Access New Purchase Order

You will automatically be directed to the orders overview screen.

In the overview, you can display all **orders**, **grouped by material number** or **grouped by unloading point**.

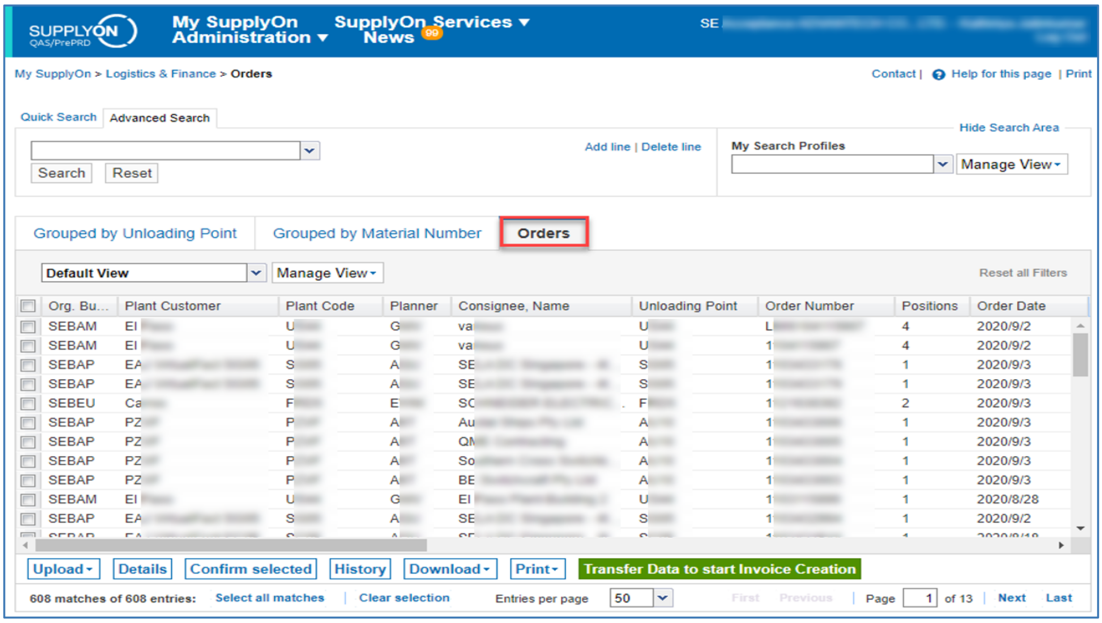


Figure 15 : Orders Overview Screen

If you are only interested in new POs you can click on **New Orders** on the Dashboard or filter for those in the **status** column in the overview screen.

PO Overview prefiltered for **status new** and **History false**:

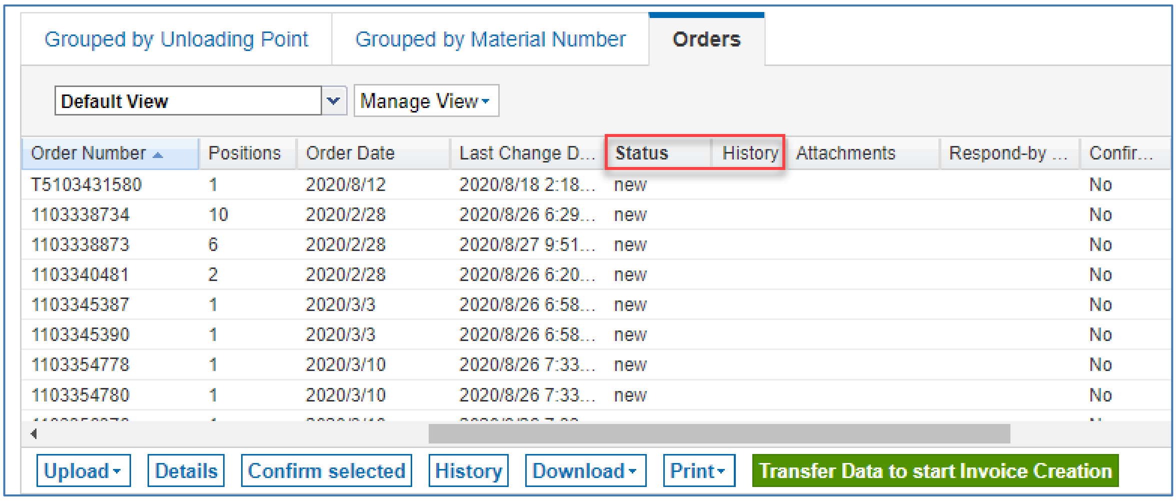


Figure 16: Prefiltering for new POs

Once done, you have these options for opening a new PO:

1. open an order with a single click on the order line
2. open an order by checking it and clicking on the **Details** button.
3. You can also create a printout by clicking on the **Print** button.

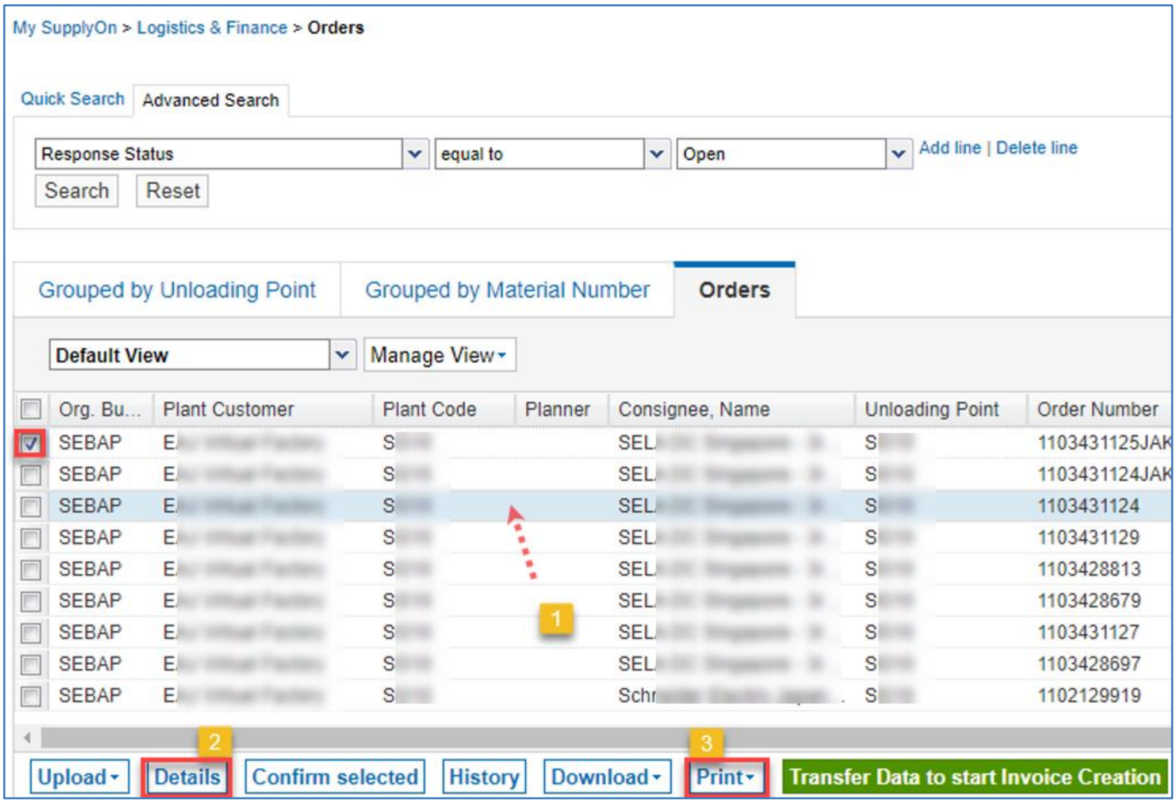


Figure 17 : Enter Purchase Order Details

Once you have clicked on a PO as described earlier, you will see its details:

1. The order items are listed in the **Line Items** (LI) tab. You can open an LI by clicking on the respective item number.
2. This section shows basic information about the line item, e.g. **Unloading Point**, etc.
3. This section shows further SE specific information, e.g. **MRP Controller Code** or **Notes for RDD**.
4. This section displays both the **Requested Delivery Date** (RDD) and the **Requested Delivery Quantity**.
5. The tab pages **Header details** and **Parties** contain general information about the order.

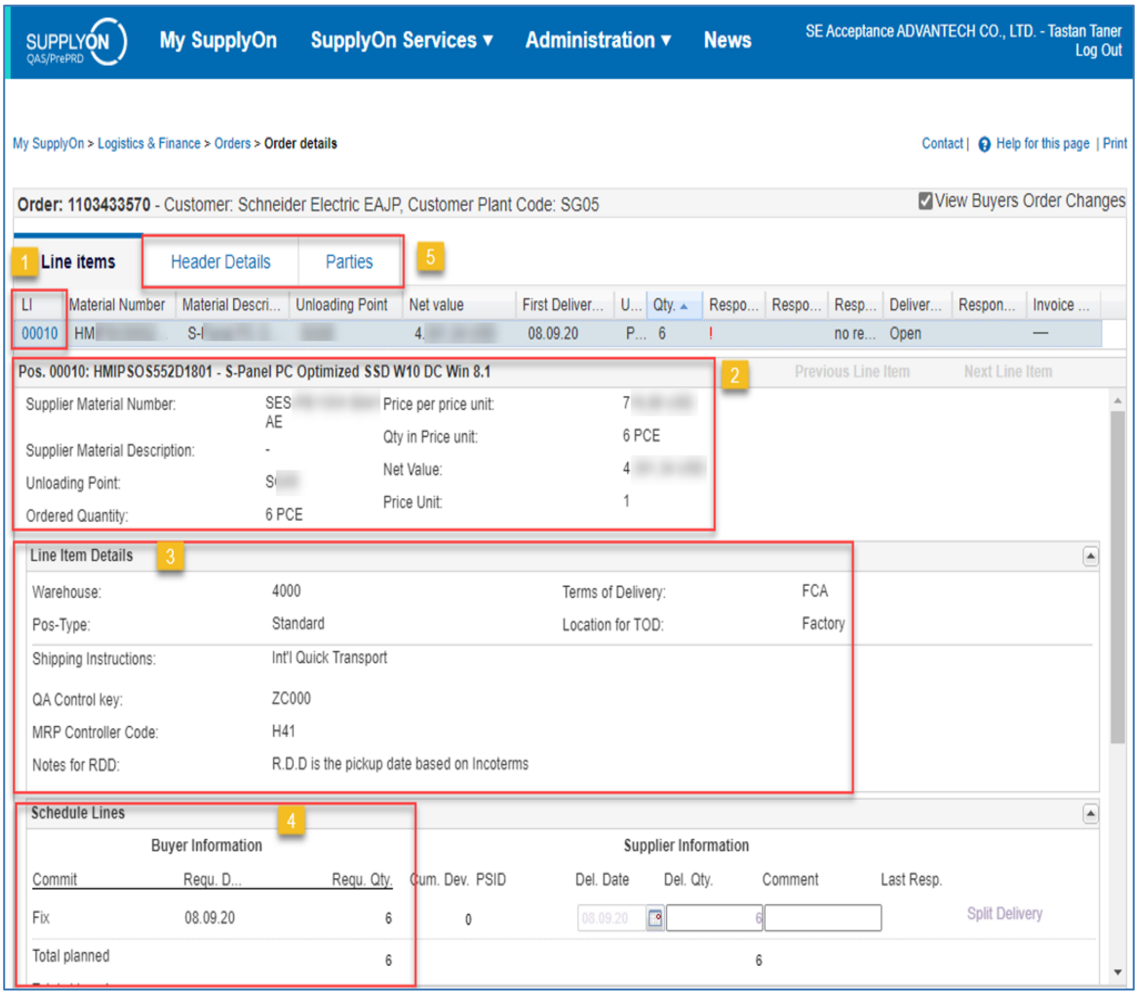


Figure 18 : Order details screen

4.1.2 Confirmation of New Purchase Order

PO confirmation can be done either via an up- and download template or via the Orders Overview Screen on the UI.

4.1.2.1 Download of Purchase Orders

You have the possibility to download all orders at once:

1. Click on the box
2. Click on **Download** > **Confirmation template**
3. Click on **Basic Confirmation Template** (3).

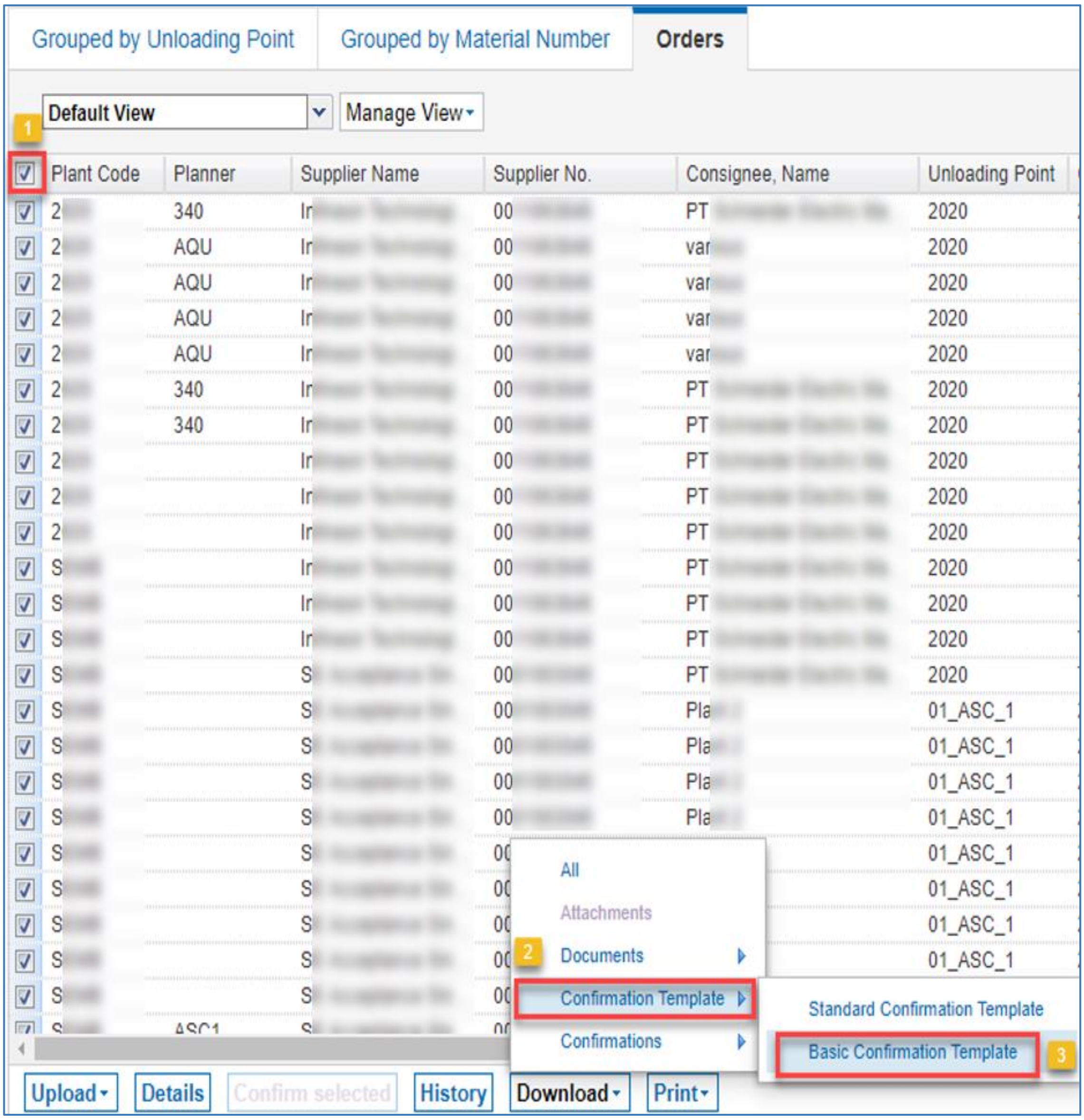


Figure 19 : PO Down- and Upload

NOT included in the download are following Line Items:

- Demand qty. minus received quantity (from GRs) <= 0 OR
- Order item is cancelled by customer SE
- item is marked as fully received

The file can also be created by yourself. However, it is important to follow these rules:

- Format of file should be: XLS
- file consists of 16 columns, starting from Organization of your customer until the consignee name. The template must not be changed, only the four relevant columns for confirmation of order(s), which are marked in green, can be adjusted:

Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line

- Confirmed quantity should not be more or less than the requested quantity from the PO.
- Confirmed Delivery Date should not be in the past.

Attached file below shows you a sample order in the Up/Download template format.

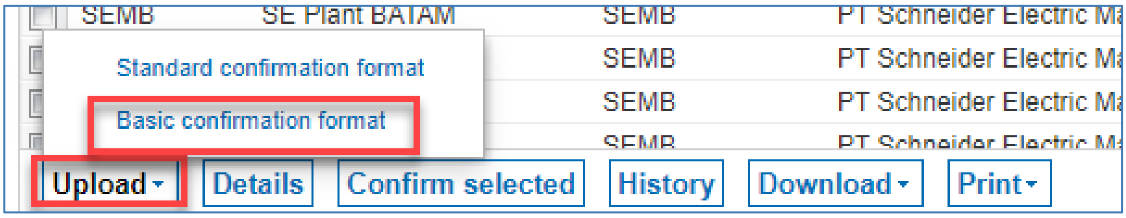
Sample for UpDownloadtemplate (Double-click!)

4.1.2.2 How to confirm an order As-Is via the template?

In order to confirm a new PO As-is, your customer expects you to enter your acknowledgment document number into the field **internal supplier number** and comments can be entered in the column **Comments schedule line**.

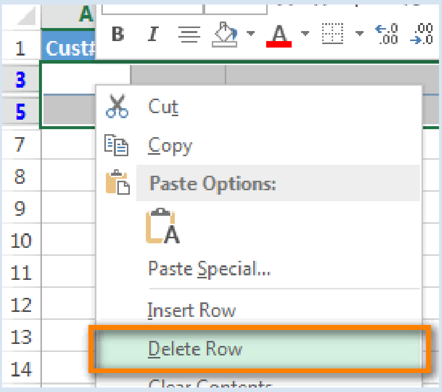
	K	L	M	N
1	Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line
2	18.08.2020	25		

Once the confirmation template is finished, save it locally and upload it on the orders overview screen by clicking on **Upload** > **Basic confirmation fomat** > Select your locally saved file



Note

If you want to upload only certain PO line items, you can delete the irrelevant line items. However, do not execute the command with the delete button on your keyboard, but rather delete the whole row in the XLS sheet.



4.1.2.3 How to confirm a PO with changes via the template?

In order to confirm a new PO with changes, you can change the **confirmed delivery date** (CDD). Then add information into the field's **internal supplier number** and **comments schedule line** (if necessary).

In following case the CDD (18.08.2020) is replaced by a new value, which is 30.08.2020.

	K	L	M	N
1	Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line
2	30.08.2020	25		

Once you have replaced the old value, save the file and upload it on SO

Once the template is uploaded, you will see the changed CDD on the UI in the orders details.

In order to confirm a new PO as a Split-delivery, you have to copy the schedule line, which is being splitted and adjust the **delivery date** and **quantity**.
In following example, the 5000 pcs (RDD = 01.07.2020) are splitted in two schedule lines:

- 3000 pcs on 09.07.2020
- Remaining 2000 pcs on 30.07.2020

1. Copy the whole line (STRG + C) of the order position, which is going to be splitted.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Org	Plant	Plant Name	Order Number	Order Position	Customer Material Number	Supplier Material Number	Order Date	Requested Delivery Quantity	Requested Delivery Date	Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line
SEMB	2020	SE Plant BATAM	1234	00001	M65	19-877	25.08.2020	5000	25.06.2020	01.07.2020	5000		

2. Paste copied order position one line below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Org	Plant	Plant Name	Order Number	Order Position	Customer Material Number	Supplier Material Number	Order Date	Requested Delivery Quantity	Requested Delivery Date	Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line
2	SEMB	2020	SE Plant BATAM	1234	00001	M65	19-877	25.08.2020	5000	25.06.2020	01.07.2020	5000		
3	SEMB	2020	SE Plant BATAM	1234	00001	M65	19-877	25.08.2020	5000	25.06.2020	01.07.2020	5000		

3. Split your delivery by adjusting the values in the fields “Confirmed delivery date” and “Confirmed Delivery Quantity”. Afterwards add your Acknowledgment Document Number.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Org	Plant	Plant Name	Order Number	Order Position	Customer Material Number	Supplier Material Number	Order Date	Requested Delivery Quantity	Requested Delivery Date	Confirmed Delivery Date	Confirmed Delivery Quantity	Internal Supplier Number	Comments Schedule Line
2	SEMB	2020	SE Plant BATAM	1234	00001	M65	19-877	25.08.2020	5000	25.06.2020	09.07.2020	3000	Ackn-1	
3	SEMB	2020	SE Plant BATAM	1234	00001	M65	19-877	25.08.2020	5000	25.06.2020	30.07.2020	2000	Ackn-2	

4. Once the confirmation template is finished, save it locally and upload it on SO.

4.1.2.4 How to confirm a PO on the UI?

1. Select one or several POs.
2. Click “Confirm selected”

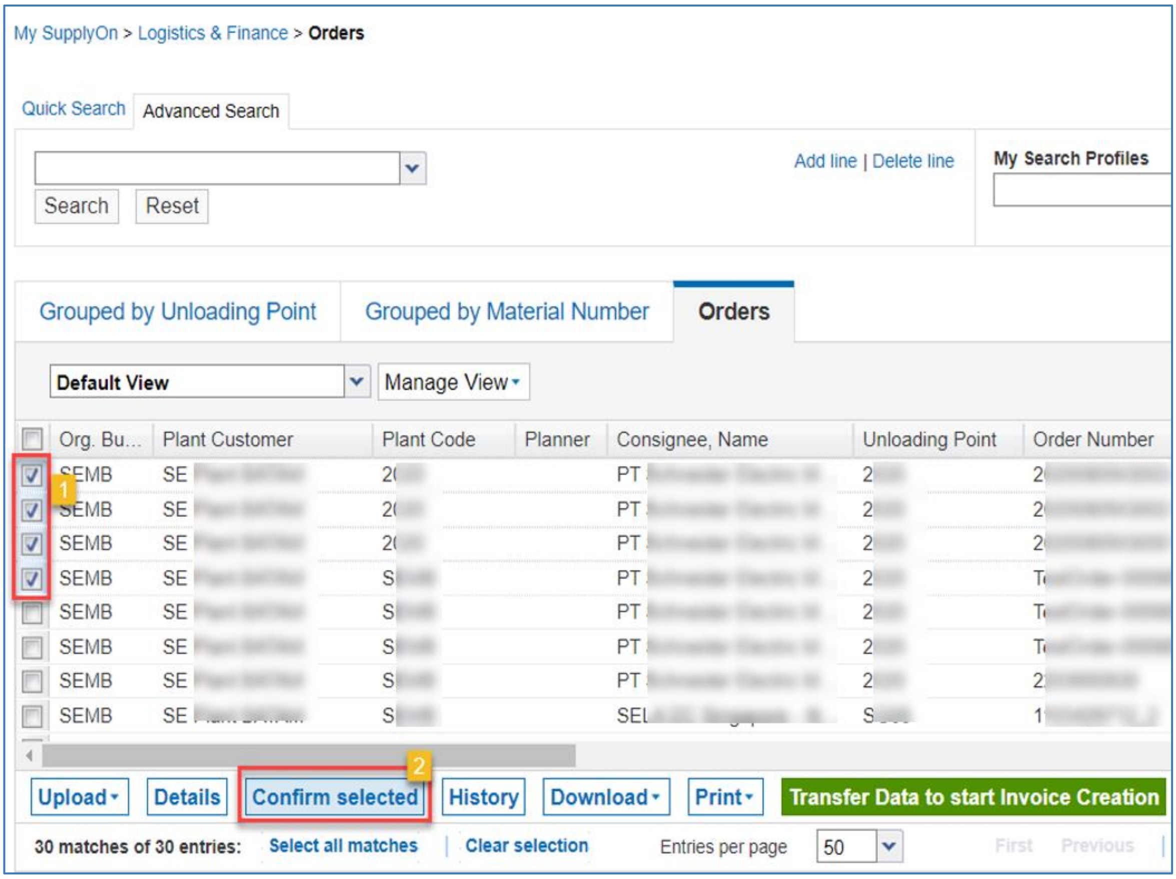


Figure 20 : Confirm as-is 1

4.1.2.5 How to confirm the PO As-Is on the UI?

Enter Order details:

1. Check the delivery date (1) and the delivered quantity.
2. If you agree, click on **Confirm as-is** and
3. The customer expects in this field Acknowledgment Document Number
4. To finalize your confirmation of this LI, click on **Save and send**.

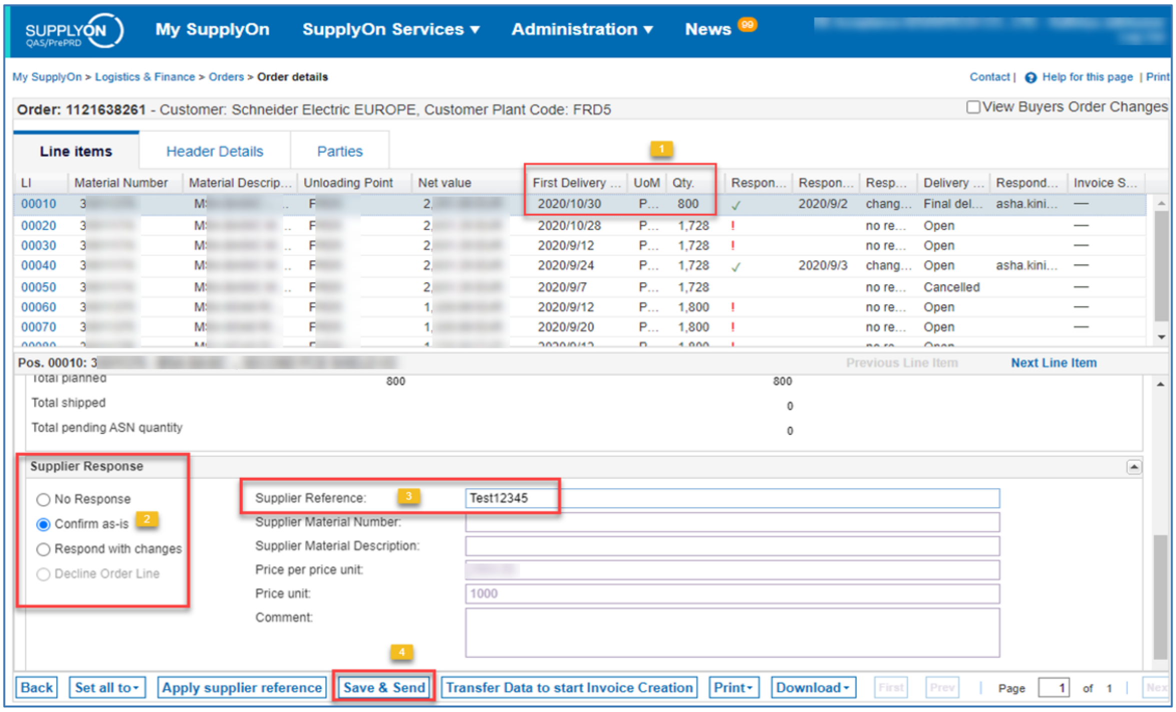


Figure 21 : Confirmation as-is 2

Note

By clicking on **Set all to** you can confirm all LI at once.

Your order confirmation has been successfully transmitted when the notification **Confirmation successfully sent**! appears. Moreover, the **Response Result** will change into **confirmed** and the **response date** will be shown.

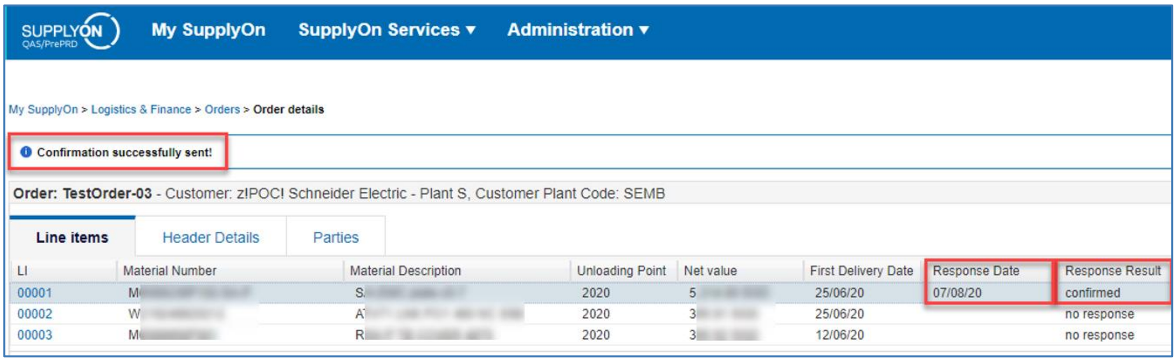


Figure 22 : Order response sent

4.1.2.6 How to confirm the PO with changes on the UI?

1. Check the **delivery date** and the **delivered quantity**. If you are not able to deliver the required quantity at the desired time, click on **Respond with changes**.
2. The delivery date can be changed or
3. The quantity can be split into different delivery dates (described below)
4. Your customer SE awaits your Acknowledgment Document number.
5. To finalize your confirmation of this Line item, click on **Save and send**.

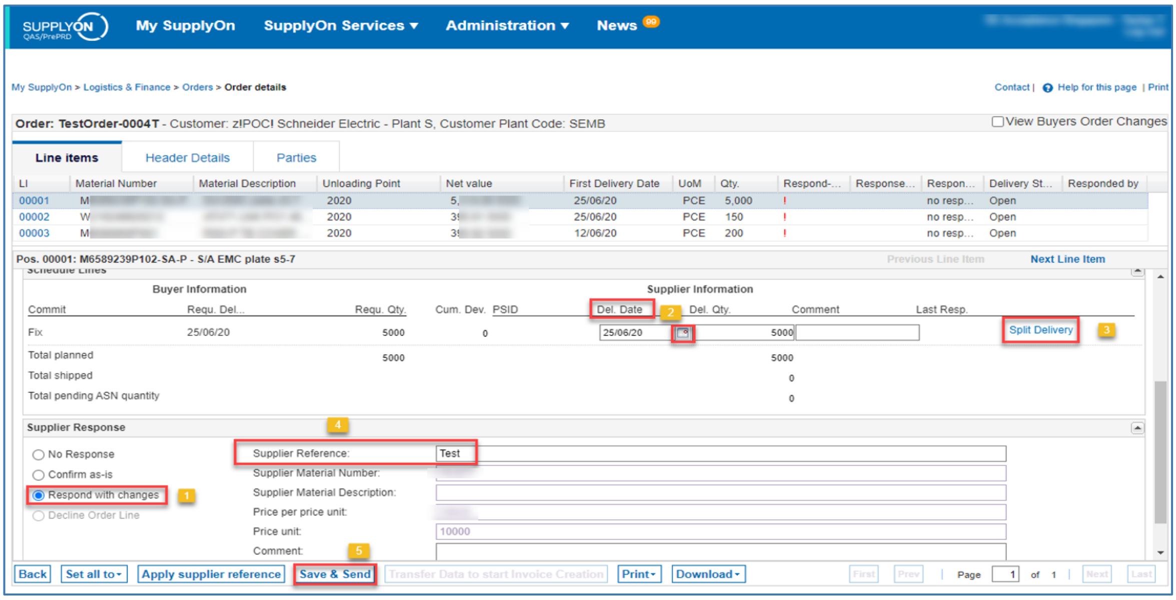
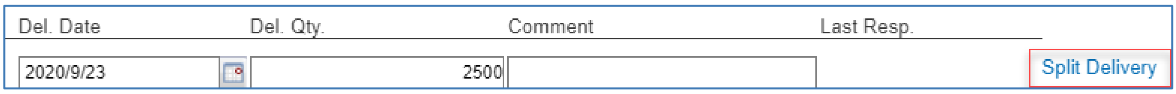


Figure 23 : Respond with Changes

In case of a split delivery, click on the button Split Delivery and add lines for the planned deliveries. In following example the delivery of 2500 pieces of a good with Requested delivery date 23.09.2020 is splitted into two shipments. That's why the Split Delivery button needs to be clicked on twice.

- 2000 PCE on 21.10.2020; 500 PCE on 28.10.2020



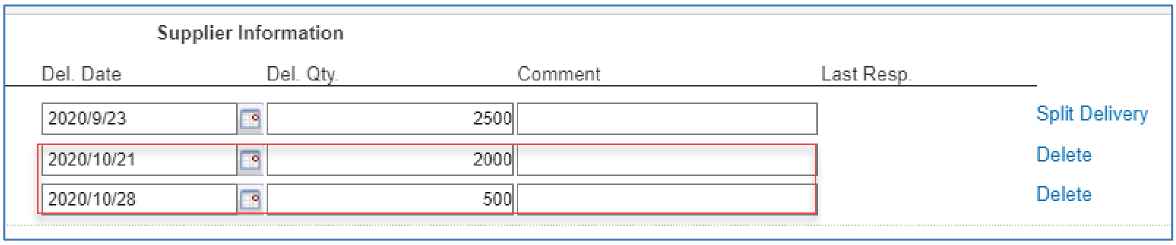


Figure 24 : PO split

Note

In order to split your delivery, the SE plant to be supplied must be activated for this function. You can see this if the Split Delivery button is grayed out or if you are able to click on it alternatively.

4.2 Changed Purchase Order

4.2.1 Accessing changed Purchase Order

As soon as you receive a changed order, a real-time message will be sent to your email address. A change in price, quantity or RDD will trigger such an email, meaning an original order will be re-scheduled.

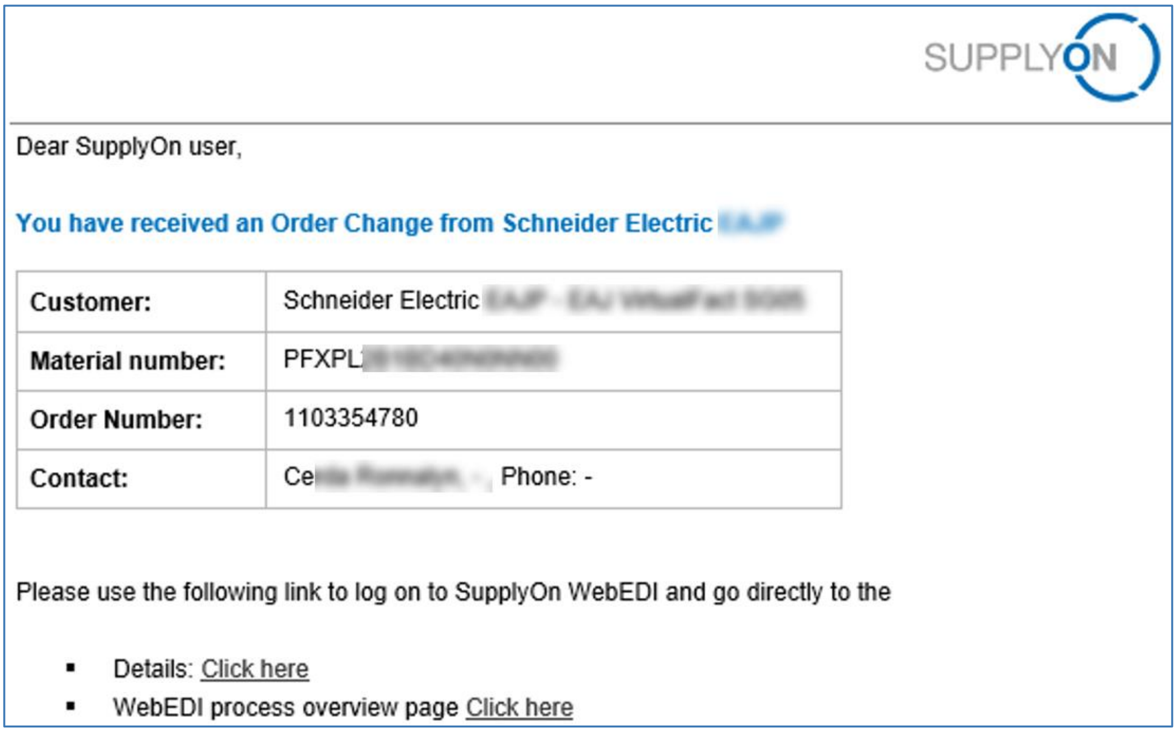
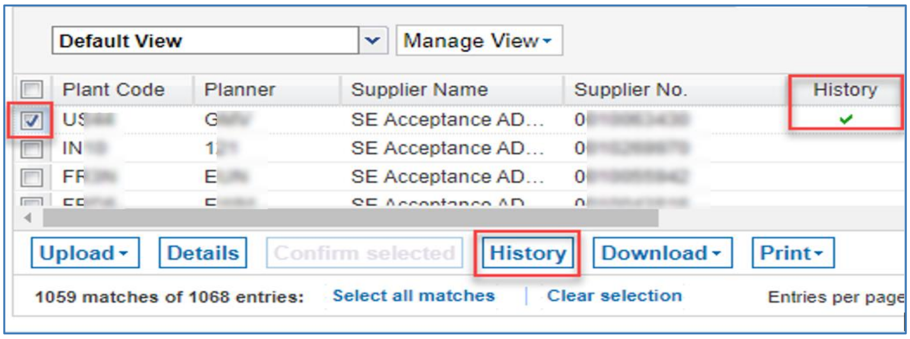


Figure 25: Mail notification for changed PO

If the initial order has been changed by the customer, this is indicated by a green check mark in the History column and the status dated in the Response Status column.

In order to view the changes in detail, tick the box in front of the order and click on History in the menu on the bottom.



Note: If the constant mails bother you and you want to deactivate them, see the chapter Creating customized Alerts.

4.2.2 Confirmation of changed Purchase Order

Registering and confirming the changed PO works the same as for new POs.

5 Goods Receipts

The following chapter deals with Goods Receipts, which inform about the receivment status of goods you sent to SE.

5.1 Access to Good Receipts

If you want to view GR, the following user role is required:

Shipping, Goods Receipts, Warehouse Management

WebEDISellerGRRead:

✓ Read access to the Goods Receipt screen.

Goods Receipt process (GR) can be accessed via the menu item **Delivery** > **Goods Receipt**.

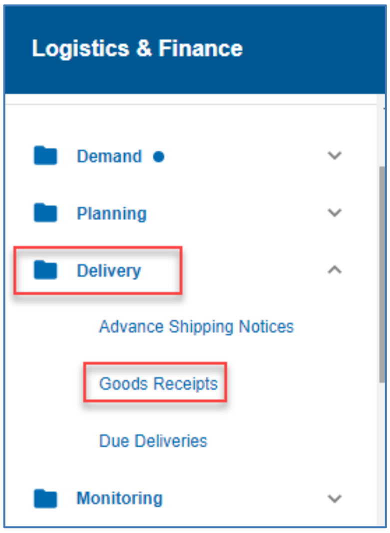


Figure 26 : Access Good Receipts process

You will automatically be directed to the GR overview screen.

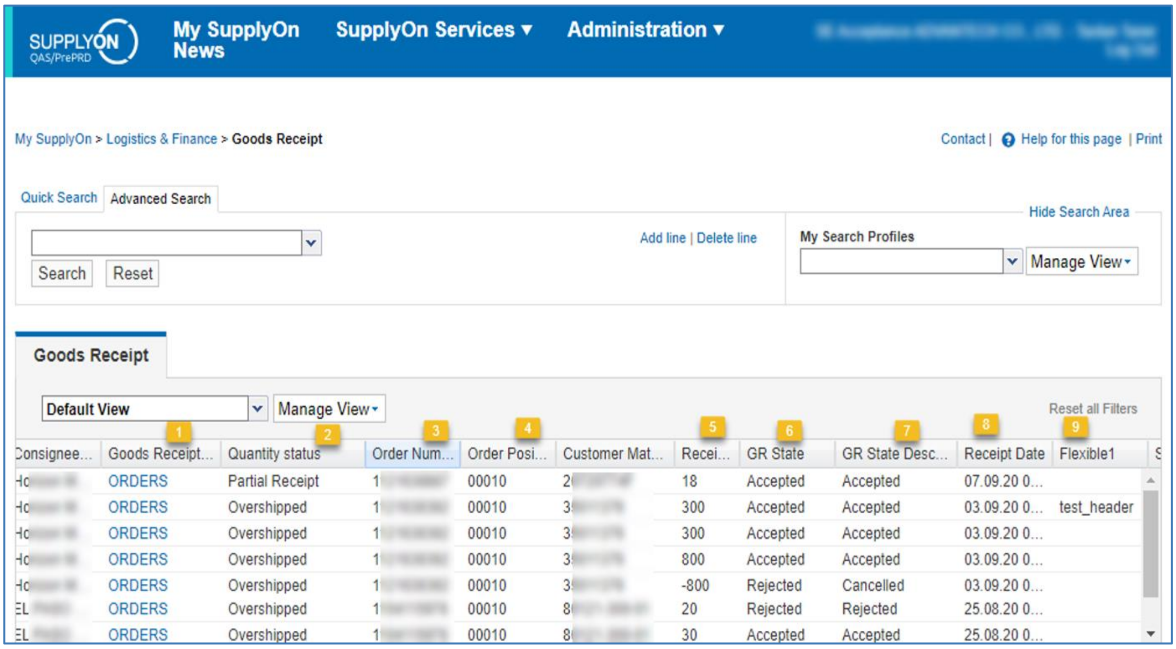


Figure 27: Goods Receipts overview

1. **Goods Receipt Type** “ORDERS” is a link to the relating Orders Object, whereas Despatch Advice (DESADV) is a link to the relating ASN on SO.
2. The **Quantity status** indicates if the GR quantity corresponds to the total order quantity or only a partial quantity.
3. **Order Number** displays relating Order number
4. **Order Position** displays relating Order Position
5. **Receipt Quantity** indicates the delivered quantity to your customer.
6. **GR State** can be Accepted or Rejected
7. **GR State Description** informs you about Cancellation or Rejection of your shipped goods.
8. **Receipt Date** indicates the date of the GR
9. **Flexible Field 1** contains remarks of SE (e.g. INV No / documents provided by supplier)

5.2 Download of Goods Receipts

Goods Receipts can be downloaded either as CSV or as XLS file by clicking on the Download-button on the bottom of the Goods Receipts Overview.

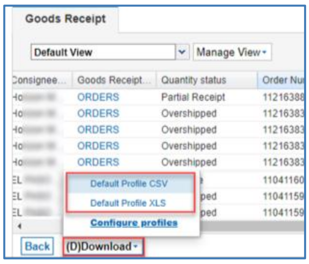


Figure 28: Downloading GR

6 FAQs and SupplyOn Contact

- **Forgot password?**

You can get a new password at any time.
Therefore you need your user ID and your e-mail address.
You get an e-mail including a link you have to click within the next 24 hours.
Subsequently you get directed to a website to specify your new password.
You can start the process here.

- **Forgot User ID?**

You can get notified about your user ID at any time.
Therefore you need your first and last name and your e-mail address.
You will receive an e-mail with your current user ID.
Important:
The e-mail address, first and last name have to be stored at SupplyOn.
Your spam filter must not block the e-mail.

Get your user ID here.

Further frequently asked questions can be read here.

Detailed information regarding the SO applications and navigation on the UI is provided on the SO media library.

E-mail address for productive issues: https://contact.supplyon.com/en/

- Worldwide support in 9 languages (English, German, French, Spanish, Portuguese, Italian, Chinese, Japanese and Korean)
- 365 days/24 hours available