

Handout for the SupplyOn Service Logistics & Finance

Working with orders and the related confirmation



Table of Contents

1	About this Manual	3
1.1	Abbreviations	3
2	How to access SupplyOn	4
3	How to work with the Dashboard	5
3.1	What can I see in the Orders tile?.....	6
3.1.1	How to view an order	6
3.2	What can I see in the Confirmable Orders tile?	9
4	How to confirm an order	10
4.1	How to check the order details.....	10
4.2	Confirm as ordered (“Confirm as-is”).....	11
4.3	Confirm deviating (“Respond with changes”).....	12
4.4	Why do I have to reconfirm an already confirmed order?.....	13
5	How to download a confirmation template and upload order confirmations	15
5.1	How can I use the XLSX confirmation template?	15
6	Configure my view	18
7	How to create a process-based alert	19
8	Roles and Rights.....	22

1 About this Manual

The content of this manual shows you how to work with purchase orders sent by your customer from their ERP system to the SupplyOn application.

1.1 Abbreviations

Abbreviation	Meaning
CSV	Comma Separated Values
EDI	Electronic Data Interchange
ERP	Enterprise-Resource-Planning
MS	Microsoft
VMI	Vendor Managed Inventory
WebEDI	Web based EDI
XLSX	Excel 2010

2 How to access SupplyOn

To work with SupplyOn your company administrator needs to set-up an account and initial password for you. The administrator will assign the appropriate roles to you ([see chapter 8, Roles and Rights](#)).

As soon as your customer creates or changes an order in his ERP system, the SupplyOn application sends an automatically generated e-mail notification to the e-mail address stored in your user account.

You can log in to SupplyOn via the e-mail

1. by clicking on the details link – opens the order
2. by clicking on the WebEDI process link – opens the Dashboard

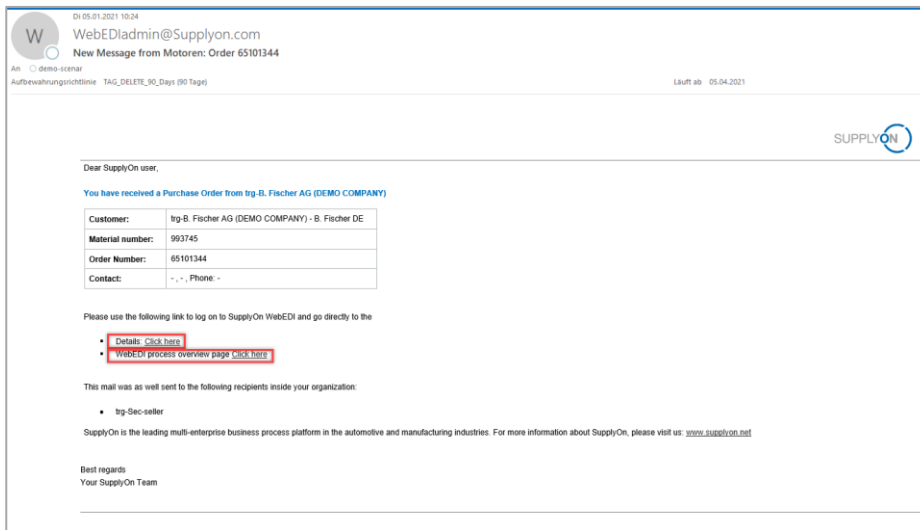


Figure: Automatically generated E-Mail notification

3. or you can open an internet-browser and log in to SupplyOn.

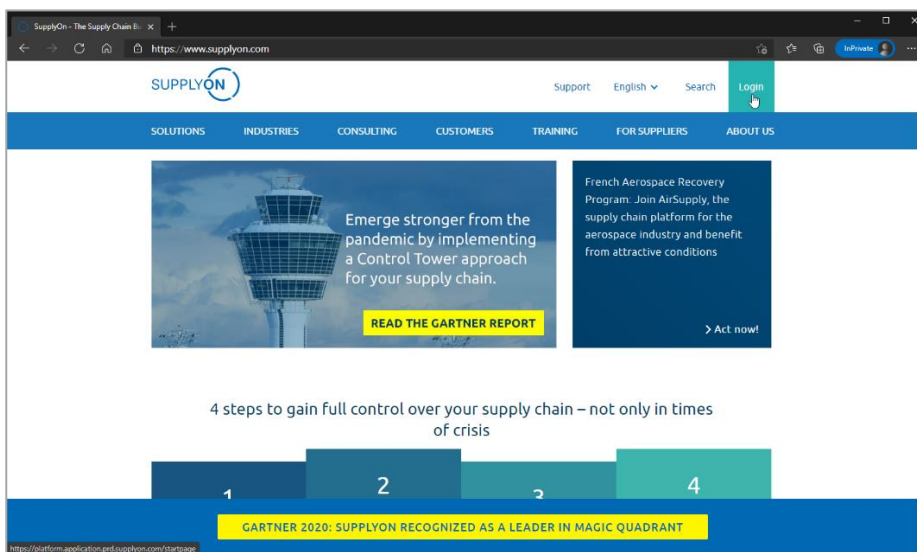


Figure: SupplyOn home page with Login button

Depending on your roles, you may see different tiles than used in the following screenshots.

4. Click the tile **Logistics & Finance**

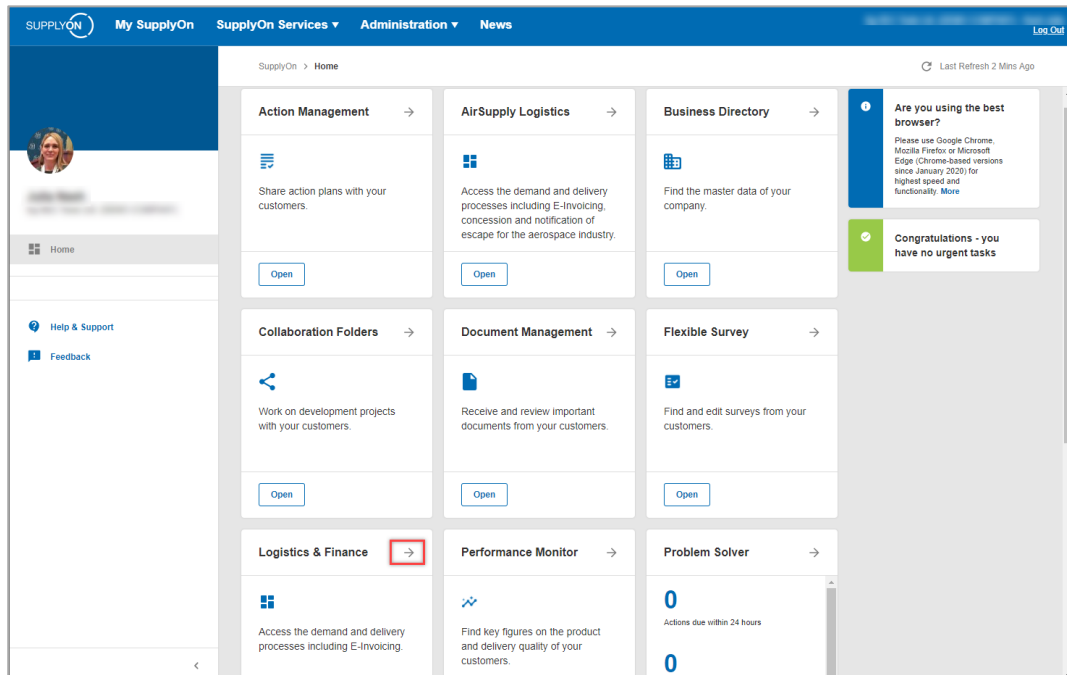


Figure: Home screen with tiles per application and actual notifications

3 How to work with the Dashboard

The **Dashboard** is displayed.

Depending on your roles, you may see different tiles than used in the following screenshots.

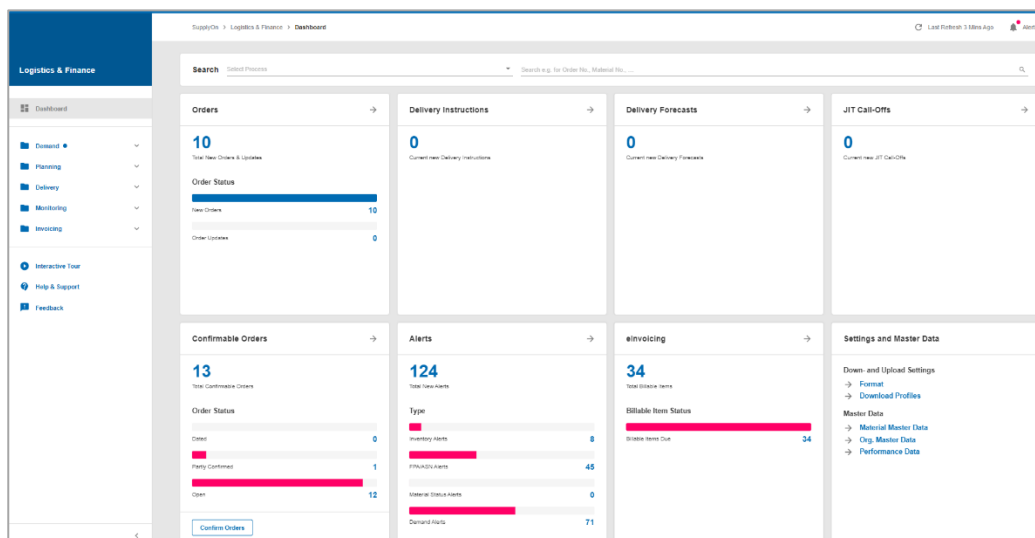


Figure: Dashboard

What can I see in the Orders tile?

Within the Orders tile you see an overview of newly arrived orders.

- ✓ New Orders – these orders are not yet read
- ✓ Order Updates – Customer’s changes of existing orders which have not been read yet
- ✓ →- a click here opens the overview of all orders

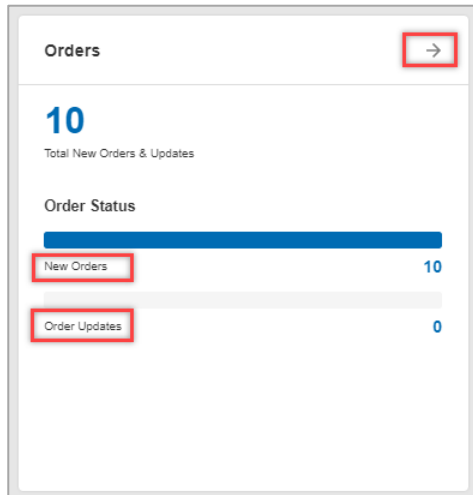


Figure: Dashboard / tile / Orders

3.1.1 How to view an order

1. To get an overview of all orders click ->

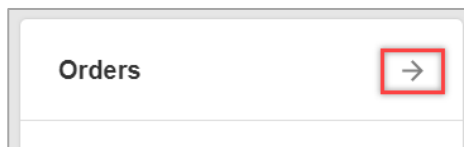


Figure: Dashboard / tile / Orders

All orders so far received are displayed.

2. If you want to check the order details, open the corresponding order **by clicking on it anywhere in the line:**

Org. Bu.	Plant Customer	Plant Code	Planner	Consignor, Name	Unloading Point	Order Number	Postfests	Order Date	Last Change D.	Status	History	Attachments	Respond by	Contr.	Response St.	Response Date	Order Type	Incoitems Code	Incoitem
S_TRG	100_1000	100_1000	Purch.	trg-Acceptance	München	4561321251	2	19.01.21	23.02.21 17:37	new	✓			No	Open		Purchase Dr.	EXW	Mün
S_TRG	100_1000	100_1000	Purch.	trg-Acceptance	München	4561321253	1	19.01.21	23.02.21 17:34	read	✓			Yes	Dated	23.02.21	Purchase Dr.	EXW	Mün

Figure: Orders / Overview

The order details screen is opened. In this example, the order consists of two line items, each with a different material number.

LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty	Respond-b...	Response...	Respons...	Delivery Status	Responded by	Invoice Status
00010	A01C0001632-1	Training-Article-1632-1	München		30.01.21	PCE	500	I			no respo...	Open	
00020	A02C0001632-2	Training-Article-1632-2	München		30.01.21	PCE	1600	I			no respo...	Open	

Figure: Orders details / Order with 2 lines

Order updates are marked with a green !

3. To view the details of a change, click the green !

This example shows that the customer has increased the quantity from 500 to 600 pieces.

4. To close the details, click the x.

My SupplyOn > Logistics & Finance > Orders > Order details Contact | Help for this page | Print

Order: 4561321251 - Customer: trg_Siemens Training Buyer, Customer Plant Code: 100_1000 View Buyers Order Changes

Line Items	Header Details	Parties											
LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty.	Respond-b...	Response ...	Respons...	Delivery Status	Responded by	Invoice Status
00010	A01C0001632-1	Training-Article-1632-1	München		30.01.21	PCE	500	!		no resp...	Open		---
00020	A02C0001632-2	Training-Article-1632-2	München		30.01.21	PCE	600	!		no resp...	Open		---

Pos. 00020: A02C0001632-2 - Training-Article-1632-2 Previous Line Item Next Line Item

Supplier Material Number: A02S0001632-1 Price Unit: 1

Unloading Point: München

Ordered Quantity: 600 PCE

Price per price unit: ! Previous order timestamp: 02.11.18 16:20:00 x

Ordered Quantity: 500 PCE

Line Item Details

Place of Consumption: 100_1000 Country of Origin: DE

Free Text: Training-Article-1632-2

Cust. Remarks:

Tax code : NT (API/GL - Not Taxable - US)
 Basic Material Number:
 Material Classification Information:
 Tech Mat Spec : 85252100
 Hash : 7FCE8D05ED892B517B54927DDFD7247
 Serialization Required : NO
 Serialization Inherit : NO
 X-plant status : 40
 All Documents Linked to Material:
 501D05-TBB10-092-D01(DWG/000B)(AR ID:501D05-TBB10-092-D01(B)
 Purchase Specification = 1035542
 Purchase specification EON = 75859

Customs Clearance Instructions:

AL:4
 ECCN: 5

Siemens SAP Plant: DP01

ESN: 1662.3

[Back](#) [Set all to -](#) [Apply supplier reference](#) [Save & Send](#) [Create Invoice](#) [Create FPA/ASN](#) [Print-](#) [Download-](#)

Figure: Orders details / with change from customer related to quantity

You can either print or download (as CSV or XSLX) each order separately with a click on the buttons at the bottom.

Supplier Response

No Response
 Confirm as-is
 Respond with changes
 Decline Order Line

Supplier Reference:

Supplier Material Number: A02S0001632-1

Supplier Material Description:

Price per price unit: 1475

Price unit: 1

Comment:

Country of Origin (Supplier):

Export Control Classification Number:

Export List Number:

Statistical Material Number:

[Back](#) [Set all to -](#) [Apply supplier reference](#) [Save & Send](#) [Create Invoice](#) [Create FPA/ASN](#) [Print-](#) [Download-](#)

Figure: Orders details / with action buttons at the bottom of the screen

Or by going back (button “Back” at the bottom of the screen) you select multiple orders in one go to print or download them.

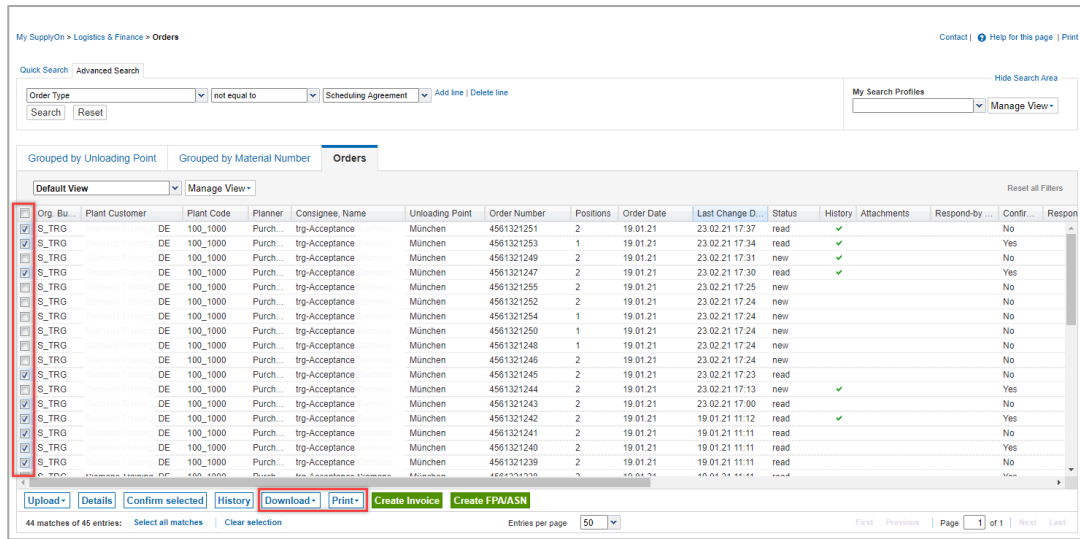


Figure: Orders / Order Overview screen with action buttons at the bottom of the screen

3.2 What can I see in the Confirmable Orders tile?

Within the Confirmable Orders tile you see your workload.

- ✓ Dated – these orders have been confirmed as-is or with changes by you already and the customer has sent an update which requires your re-confirmation
- ✓ Partly Confirmed – At least one line item has already been confirmed by you, whereas one or more line items in the same purchase order are awaiting your confirmation
- ✓ Open – the order has been not yet confirmed
- ✓ → - a click here opens the overview of all orders

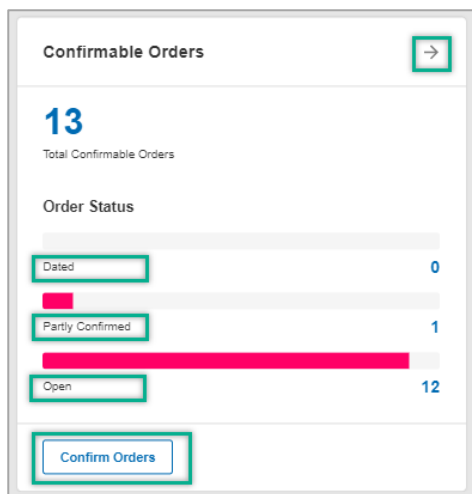


Figure: Dashboard / tile / Confirmable Orders

4 How to confirm an order

As already shown there are different ways of accessing unconfirmed orders. You may want to check the order first before you confirm.

4.1 How to check the order details

1. Open the **Dashboard**
2. In the **Orders** tile, click **New Orders**
3. **Click** into one line

The Order details screen is opened. To check all information the customer gave you, select each order line separately and scroll down to see further details. In this example order line 00010 is selected.

My SupplyOn > Logistics & Finance > Orders > Order details Contact | Help for this page | Print

Order: 4561321241 - Customer: trg_Siemens Training Buyer, Customer Plant Code: 100_1000 View Buyers Order Changes

LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty.	Respond-b...	Response ...	Respons...	Delivery Status	Responded by	Invoice Status
00010	A01C0001632-1	Training-Article-1632-1	München		30.01.21	PCE	500			no respo...	Open		---
00020	A02C0001632-2	Training-Article-1632-2	München		30.01.21	PCE	500			no respo...	Open		---

Pos. 00010: A01C0001632-1 - Training-Article-1632-1 Previous Line Item Next Line Item

Supplier Material Number: A01S0001632-1 Price Unit: 1

Unloading Point: München

Ordered Quantity: 500 PCE

Price per price unit: 1.475,00 EUR

Line Item Details

Place of Consumption: 100_1000 Country of Origin: DE

Free Text: Training-Article-1632-1

Cust. Remarks: Tax code - NT (AP/IGL - Not Taxable - US)
Basic Material Number-
Material Classification Information:
Tech Mail Spec: 35232100
Hash : 7PCEB09E0ED892B517B54927DDFD7247
Serialization Required - NO
Serialization Inherit - NO
X-plant status - 40
All Documents Linked to Material:
501D05-TBB10-092-D01D(VIG)000(B)(All ID:501D05-TBB10-092-D011B)
Purchase Specification = 1035542
Purchase specification ECN = 75859

Customs Clearance Instructions: AL 1
ECCN: 2

Siemens SAP Plant: DP01

Original purchase order: 631.5866.1

Buttons: Back | Set all to... | Apply supplier reference | Save & Send | Create Invoice | Create FPA/ASN | Print | Download

Page 1 of 1

Figure: Orders details / Line Items tab with 2 order lines

4. Scroll down to the area **Schedule Lines**

On the left side in the **Buyer Information** section you can see that the customer wants the material delivered in two batches.

Order: 4561321251 - Customer: trg_Siemens Training Buyer, Customer Plant Code: 100_1000

LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty	Respond-by...	Response...	Response...	Delivery Status	Responded by	Invoice Status
00010	A01C0001632-1	Training-Article-1632-1	München		05.02.21	PCE	500	✓	13.04.21	changed	Completely s...	onur.uzun@su...	
00020	A02C0001632-2	Training-Article-1632-2	München		10.02.21	PCE	600	✓	13.04.21	changed	Completely s...	onur.uzun@su...	

Pos. 00010: A01C0001632-1 - Training-Article-1632-1

Buyer Information			Supplier Information					
Commit	Requ. Del.	Requ. Qty	Cum. Dev.	PSID	Del. Date	Del. Qty	Comment	Last Resp.
Fix	30.01.21	400	-400		30.01.21	35		Split Delivery
		0	100		05.02.21	50		Split Delivery
Fix	05.02.21	100	0		05.02.21	35		Split Delivery
Total planned		500						500
Total shipped								500
Total pending ASN quantity								0

Supplier Response

No Response
 Confirm as-is
 Respond with changes
 Decline Order Line

Supplier Reference: 04132021
 Supplier Material Number: A01S0001632-1
 Supplier Material Description:
 Price per price unit: 1475
 Price unit: 1
 Comment:

Figure: Orders details / Line Items tab / Buyer Information for first order line

After checking the line details, you can confirm the order – the following options are available:

4.2 Confirm as ordered (“Confirm as-is”)

Order: 4561321241 - Customer: trg_Siemens Training Buyer, Customer Plant Code: 100_1000

LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty	Respond-by...	Response...	Response...	Delivery Status	Responded by	Invoice Status
00010	A01C0001632-1	Training-Article-1632-1	München		30.01.21	PCE	500				no response	Open	
00020	A02C0001632-2	Training-Article-1632-2	München		30.01.21	PCE	500				no response	Open	

Pos. 00010: A01C0001632-1 - Training-Article-1632-1

Supplier Material Number: A01S0001632-1
 Unloading Point: München
 Ordered Quantity: 500 PCE
 Price per price unit: 1,475.00 EUR

Line Item Details

Place of Consumption: 100_1000
 Country of Origin: DE
 Free Text: Training-Article-1632-1
 Cust. Remarks: Tax code: NT (APIGL - Not Taxable - US)
 Basis: Material Number:
 Material Classification Information:
 Tech Mat Spec.: 85252100
 Hash: 7PCEB006ED9029517B54927DDFD7247
 Serialization Required: NO
 Serialization Inherent: NO
 X-staff status: 40
 All Documents Linked to Material:
 601005-TBB10-092-D01(DWG000)B(Alt ID 501D06-TBB10-092-D01)B
 Purchase specification: 7103542
 Purchase specification ECN: 75859
 Customs Clearance Instructions: AL: 1
 ECCN: 2
 Siemens SAP Plant: D1P01
 Serial number: SN-1656-1

Figure: Orders details / Line Items tab

1. Check the requested **delivery date**, corresponding **quantity** as well as the **price per unit**.
2. Select the entry **Confirm as-is**
3. Fill-in required mandatory fields which are marked in yellow, e. g. enter your internal **reference number** for this order
4. Click **Save & Send**

The screenshot shows the 'Supplier Response' section for a specific line item. The 'Confirm as-is' radio button is selected. Several fields are highlighted with red boxes: 'Supplier Reference' (29210222_01), 'Supplier Material Number' (A01S0001632-1), 'Supplier Material Description' (Training-Article-1632-1), 'Price per price unit' (1475), and the 'Save & Send' button. The 'Supplier Reference' field is also highlighted in yellow.

Figure: Orders details / Line Items tab / Supplier Response area / Confirm as-is

4.3 Confirm deviating (“Respond with changes”)

You want to confirm deviating, e.g. delivery date and / or quantity need to be changed.

1. Check the requested **delivery date**, corresponding **quantity** as well as the **price per unit**.

The screenshot shows the 'Line Items' tab for a specific order. The 'First Delivery Date' (16.01.21) and 'Qty' (500) are highlighted with red boxes. The 'Price per price unit' (1475.00 EUR) is also highlighted with a red box. The 'Line Item Details' section is expanded, showing various technical specifications and customs information.

Figure: Orders details / Line Items tab

2. Select the entry **Respond with changes**
3. Change, for example, the **delivery quantity**
4. Click **Split Delivery**
5. Enter a new **delivery date** and the remaining **quantity**
6. Fill in required mandatory fields which are marked in yellow, e.g. enter your internal **reference** number for this order
7. Click **Save & Send**

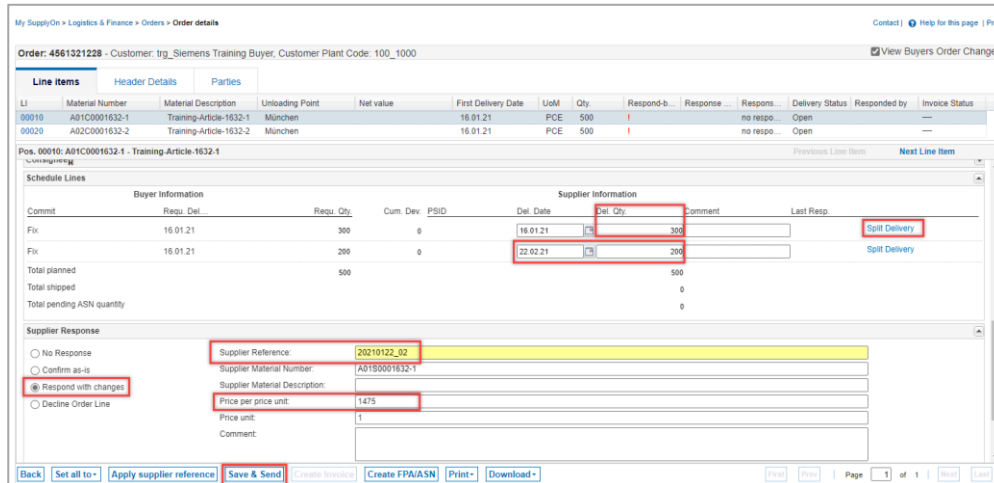


Figure: Orders details / Line Items tab / Supplier Response area / Respond with changes

4.4 Why do I have to reconfirm an already confirmed order?

If you have confirmed an order with deviations, the customer will send an update to the order. This update ensures that both parties agree and that the finally agreed parameters (quantity, price) are available for invoicing at the end of the process.

The Dashboard supports you in identifying the updated orders. The number of 'Dated' orders indicates these changes.

8. Open the **Dashboard**
9. Click on **Dated**

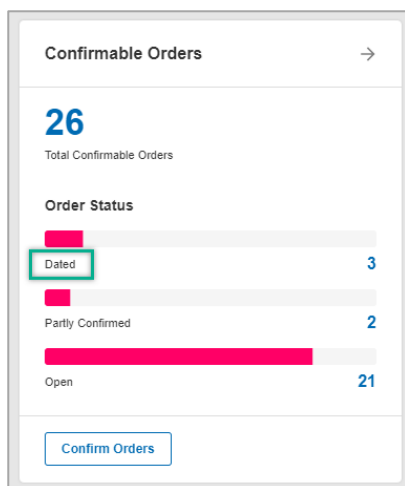


Figure: Dashboard / tile / Confirmable Orders / Dated

You get to the orders overview screen with your dated orders (in the example below 3 dated orders are displayed).
 Please note: the check mark in the **History** column will always help you to easily see which orders have been changed by your customer.

Org. Bu.	Plant Customer	Plant Code	Planner	Consignee, Name	Unloading Point	Order Number	Positions	Order Date	Last Change D.	Status	History	Attachments	Respond-by	Confir.	Response St.	Response Date
S_TRG	100_1000	Purch.	trg-Acceptance	München	4561321244	1	19.01.21	23.02.21 17:34	new	✓			Yes	Dated	23.02.21	
S_TRG	100_1000	Purch.	trg-Acceptance	München	4561321247	2	19.01.21	23.02.21 17:30	new	✓			Yes	Dated	23.02.21	
S_TRG	100_1000	Purch.	trg-Acceptance	München	4561321244	2	19.01.21	23.02.21 17:13	new	✓			Yes	Dated	23.02.21	

Figure: Orders / Dated Orders

10. Click in one **line**
11. Check the entries marked with a **green !**
12. Select the entry **Confirm as-is**
13. Enter your internal **reference** number for this order
14. Click **Save & Send**

Figure: Order details / Changed Order

5 How to download a confirmation template and upload order confirmations

Instead of confirming the orders one by one you can use the down- and upload function to confirm different orders in one step.

There are two ways:

- ✓ working with MS Excel XLSX
- ✓ or with the csv format.

In this guide we explain how to work with MS Excel.

5.1 How can I use the XLSX confirmation template?

If you want to confirm more than one order in the web application you can work with MS Excel.

1. Open the **Dashboard**
2. Click on **New Orders** in the tile **Orders**
3. Select all the orders you want to confirm by ticking the box on the left; you can also confirm all open orders at once via **Select all matches**
4. Click **Download, Confirmation Template** and **XLSX**

The screenshot shows the SUPPLYON web application interface. At the top, there is a navigation bar with 'SUPPLYON My SupplyOn SupplyOn-Services Verwaltung News' and a user profile 'Ilg-SEC Tools Ltd. (DEMO COMPANY) - Nash Julia Abmeldung'. Below the navigation bar, there is a search area with 'Quick Search' and 'Advanced Search' options. The main content area is titled 'Orders' and contains a table with columns: 'Org. Bu.', 'Plant Customer', 'Plant Code', 'Planner', 'Consignee Name', 'Unloading Point', 'Order Number', 'Positions', 'Order Date', 'Last Change D.', 'Status', 'Hist...', 'Attachments', 'Respond-by...', 'Confir...', and 'Respon...'. The table lists several orders with checkboxes in the first column. Below the table, there is a 'Download' button and a 'Confirmation Template' dropdown menu. The 'Confirmation Template' dropdown is open, showing options for 'All Attachments', 'Documents', 'Confirmation Template', and 'Confirmations'. The 'Confirmation Template' option is selected, and a sub-menu is open showing 'CSV' and 'XLSX' options. The 'XLSX' option is highlighted. At the bottom of the interface, there are buttons for 'Upload', 'Details', 'Confirm selected', 'History', 'Download', 'Print', 'Create Invoice', and 'Create FPA/ASN'. The 'Download' button is highlighted. The status bar at the bottom indicates '10 matches of 32 entries' and 'Select all matches'.

Figure: Orders / Download / Confirmation Template / XLSX

5. Open the **XLSX** file
6. Check the **Order Number(s)**
7. Decide if you leave or change the **Price per unit, Delivery date(s)** and **Delivery quantity**
8. Enter your **Internal Supplier Number**
9. **Save** your XSLX file

Order Number	position no	Buyer Material Number	Supplier Material Number	Delivery date	Delivery quantity	Quantity unit	Price per unit	Price Unit	Currency	Internal Supplier Number
4561321239	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321239	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321239	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321239	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321238	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321238	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321238	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321238	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321237	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321237	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321237	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321237	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321236	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321236	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321236	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321236	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321235	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321235	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321235	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321235	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321234	00010	A01C0001632-1	A0150001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321234	00010	A01C0001632-1	A0150001632-1	30.01.2021	200	PCE	1475	1	EUR	
4561321234	00020	A02C0001632-2	A0250001632-1	30.01.2021	300	PCE	1475	1	EUR	
4561321234	00020	A02C0001632-2	A0250001632-1	30.01.2021	200	PCE	1475	1	EUR	

Figure: MS Excel / Confirmation Template / with mandatory fields to check

10. Go back into the **Application**
11. Click **Upload** and select **Order Confirmation (xlsx)**

Org. Bu.	Plant Customer	Plant Code	Planner	Consignee Name	Unloading Point	Order Number	Positions	Order Date	Last Change D.	Status	Hist...	Attachments	Respond-by	Confr...	Respon
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321239	2	19.01.21	19.01.21 11:11	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321238	2	19.01.21	19.01.21 11:11	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321237	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321236	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321235	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321234	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321233	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321232	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321231	2	19.01.21	19.01.21 11:10	new				No	Oc
✓	S_TRG	100_1000	Purch...	trg-Acceptance	München	4561321230	2	19.01.21	19.01.21 11:09	new				No	Oc

Order Confirmation (.csv)
Order Confirmation (.xlsx)

Upload Details Confirm selected History Download Print Create Invoice Create FPA/ASN

10 matches of 32 entries: Select all matches Clear selection Entries per page 50 Page 1 of 1 Next Last

Figure: Orders / Upload / Order Confirmation (xlsx)

12. Click **Choose File**

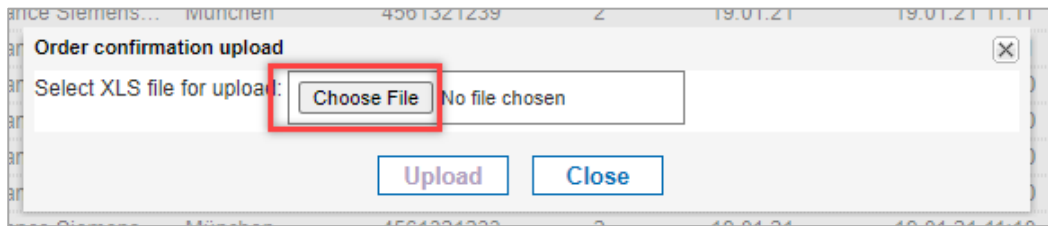


Figure: Orders confirmation upload / Choose file from Desktop

13. Open the folder **Downloads**, select the **XLSX** file and click **Open**

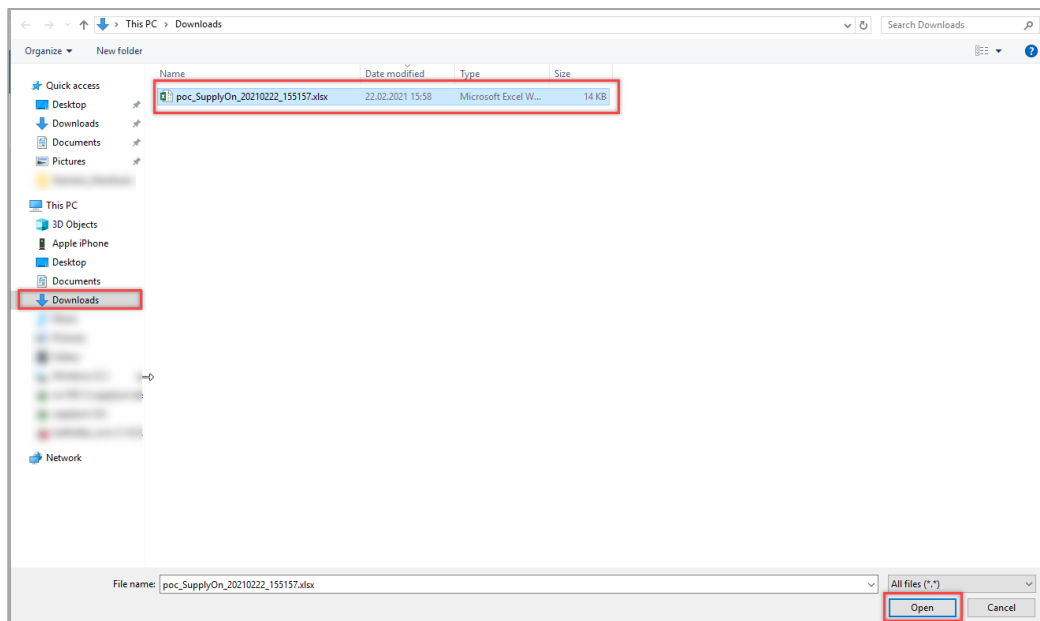


Figure: Select template

14. **Upload** the confirmation template

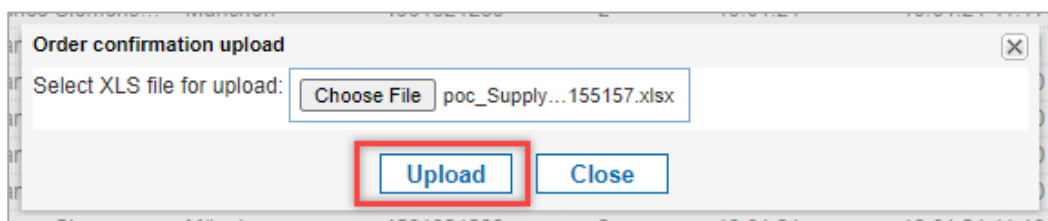


Figure: Upload template

This way you are able to confirm as many orders as you want to in one step.

You can find a technical format description of the upload template here:

[file format descriptions](#)

6 Configure my view

To facilitate your work in SupplyOn, you have the option of setting up personal views. We recommend to use this in the Orders screen.

The screenshot shows the 'Orders' screen in SupplyOn. At the top, there are search filters for 'Order Type' (set to 'not equal to') and 'Scheduling Agreement'. Below the search bar, there are tabs for 'Grouped by Unloading Point', 'Grouped by Material Number', and 'Orders'. A dropdown menu for 'Default View' is open, showing options: 'Create new', 'Update', 'Delete', and 'Set as/unset default'. The main table displays a list of orders with columns for 'Org. Bu.', 'Plant Customer', 'Consignee, Name', 'Unloading Point', 'Order Number', 'Positions', 'Order Date', 'Last Change D.', 'Status', 'History', 'Attachments', 'Respond-by', 'Confr.', and 'Respon'. The table contains 31 matches of 32 entries. At the bottom, there are buttons for 'Upload', 'Details', 'Confirm selected', 'History', 'Download', 'Print', 'Create Invoice', and 'Create FP/IASN'. The page number is 1 of 1.

Figure: Orders screen / Default View and Manage View

For details how to configure a screen please open the [media library](#) and search for the tutorial **Tips for search and configure my view**.

7 How to create a process-based alert

SupplyOn supports you in complying with the logistics KPIs. As explained [here](#), you can see your current to-dos in the dashboard in the different order tiles. Additionally, you can set up an individual email alert for specific situations. This ensures that confirmation due or other dates are no longer overlooked and logistics KPIs can be better met.

1. Open the **Dashboard**
2. Click **Alerts**
3. Select **Demand Alerts**

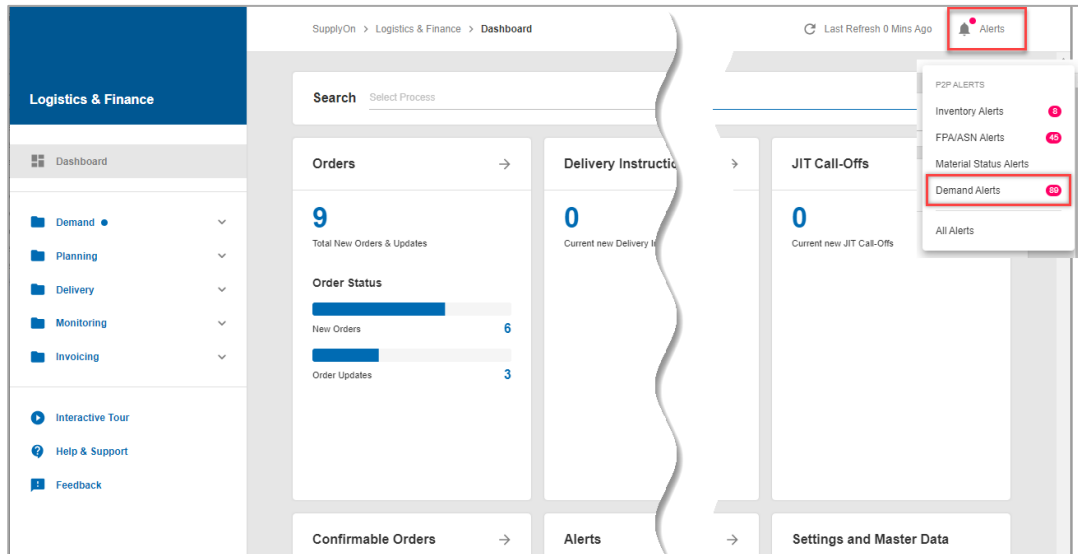


Figure: Dashboard / Alerts

Define a search profile you are interested in. In this example, find out where the confirmation status is overdue.

In this example, a view has been created ([see chapter 6](#)). The column **Days not confirmed** has been moved next to the column **Status**.

Buyer	Plant Code	Plant Buyer	Planner	Order Number	Order	Document Type	Material	Material Desc.	Status	Days not confirmed	Flag Dev	Dev. Qty
S_TRG	100_1000			5500001000	00010	ASN	A02C00010001-1		Due Delivery overdue: ASN Creation overdue	2		
S_TRG	100_1000			5500001001	00020	ASN	A02C00010002-2		Due Delivery overdue: ASN Creation overdue	2		
S_TRG	100_1000	Purchaser		4560521688	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	585		
S_TRG	100_1000	Purchaser		4560521651	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	719		
S_TRG	100_1000	Andreas S.		4560520008	00020	ASN	A2V00001151888	RUNDSTAB-3	Due Delivery overdue: ASN Creation overdue	851		
S_TRG	100_1000	Purchaser		4560521297	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	5		
S_TRG	100_1000	Purchaser		4560521297	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	64		
S_TRG	100_1000	Purchaser		4561321239	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	25		
S_TRG	100_1000	Purchaser		5500001637	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	758		
S_TRG	100_1000	Purchaser		4560521299	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	65		
S_TRG	100_1000	Purchaser		4560521299	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	66		
S_TRG	100_1000	Purchaser		4560521716	00020	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	585		
S_TRG	100_1000	Purchaser		4560521716	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	585		
S_TRG	100_1000	Andreas S.		4560520008	00010	ASN	A2V00001151888	RUNDSTAB-2	Due Delivery overdue: ASN Creation overdue	995		
S_TRG	100_1000	Purchaser		4560521916	00010	ASN	A01C0001632-1	Training-Article-1632-1	Due Delivery overdue: ASN Creation overdue	371		
S_TRG	100_1000	Purchaser		4560521676	00010	ASN	A02C0001632-2	Training-Article-1632-2	Due Delivery overdue: ASN Creation overdue	368		

Figure: Alert Overview / with personalized view

4. Build your search profile by clicking **Add a line**
5. Select the Search criteria, for this example select **Status Confirmation**
6. And select the entry **Confirmation Status Overdue**

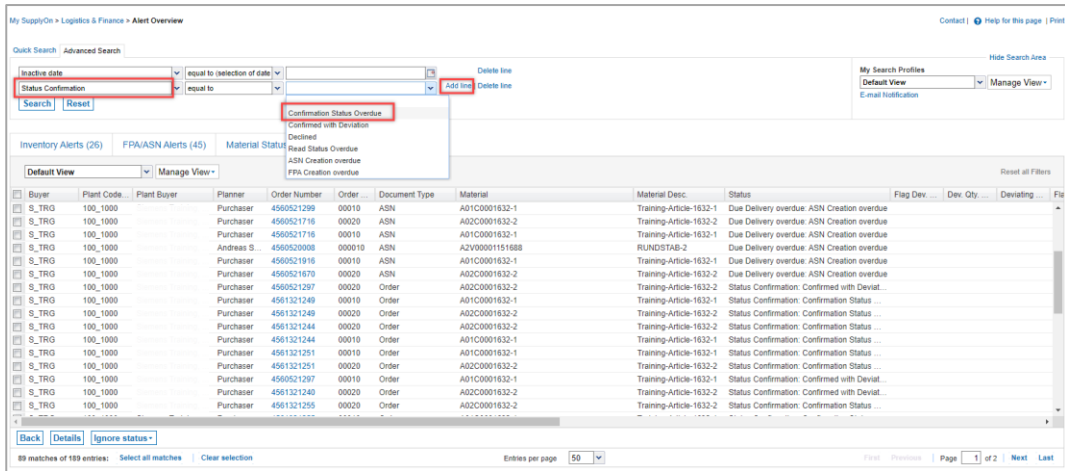


Figure: Alert Overview / with search criteria

7. Test your search parameters by clicking **Search**

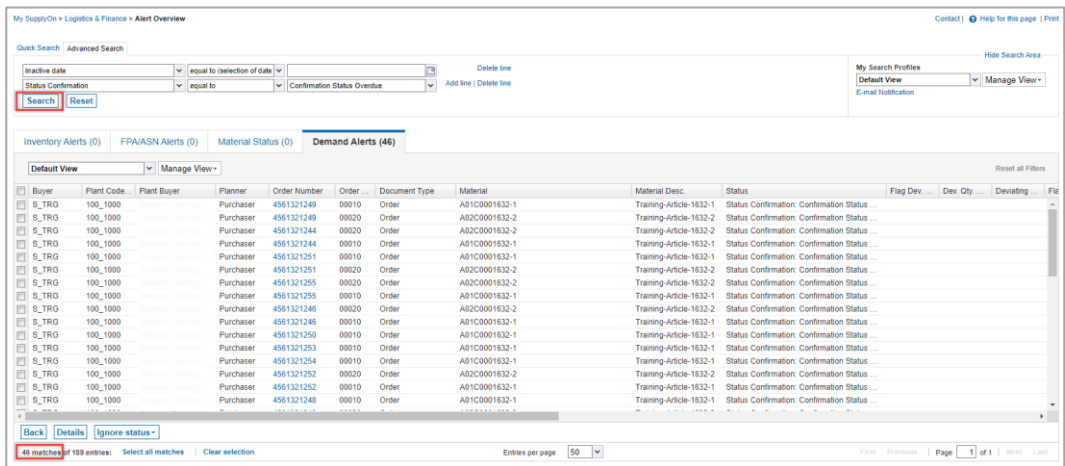


Figure: Alert Overview / Search result is displayed

You can save these search parameters as search profile and define the frequency of E-mail notifications for it. Define a name for your search parameters and save it.

8. Define a name for your **Search Profile**
9. Click on the **Drop Down** next to **Manage View**
10. and click **Create new**

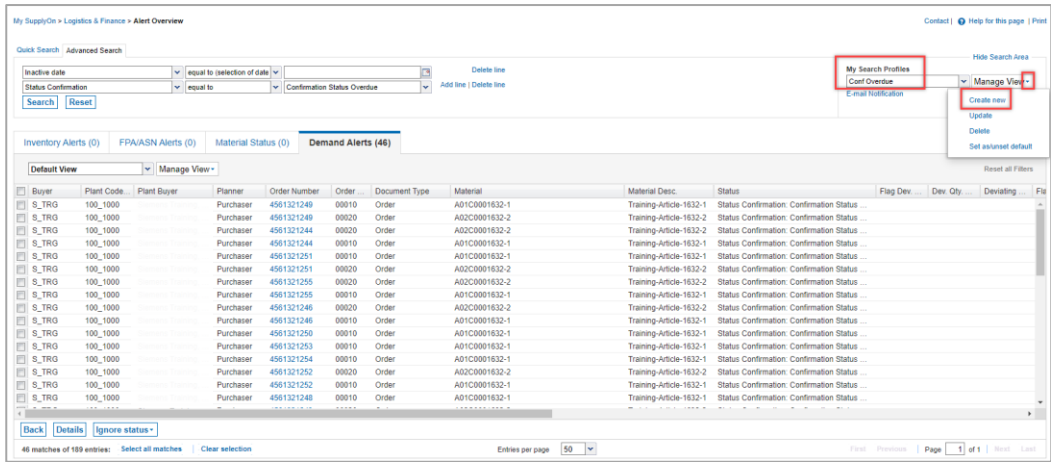


Figure: Alert Overview / Define and save Search Profile

11. Click **E-mail Notification**

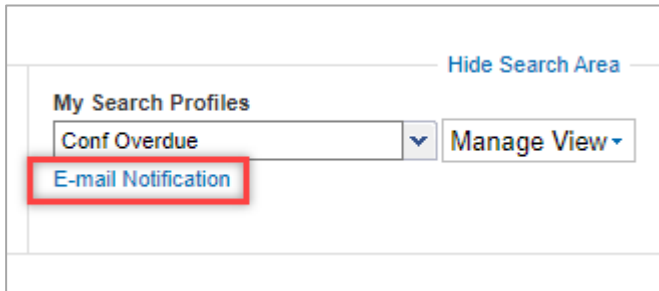


Figure: Alert Overview / Define E-mail Notification for Search Profile

12. The just created search profile is automatically selected
13. Set the tick next to **Active**
14. Define the notification period, for example on a daily basis at 8.00 am in the morning
15. Click **Save**

My SupplyOn > Logistics & Finance > Alert Overview > Email Notification

E-mail Notification

Based on Search Profile: Conf Overdue

Active

Alert Notification Type: as Attachment as Pure Text

Frequency: Periodic (according to your timezone: (GMT+01:00) Europe/Berlin)

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Daily at 08 : 00

Hourly from 8:00 to 17:00 every 4 hour(s)

Figure: Alert Overview / E-mail Notification

In this example you will receive an e-mail notification every day.

8 Roles and Rights

The SupplyOn Company Admin is authorized to create new users or to assign roles to already existing users.

For working with the purchase order process the following area of responsibility is needed: **Order Fulfillment, Finance Processes.**

Areas of responsibility			
	Name ↑	Description	More information
<input type="checkbox"/>	Company Administration	Company master data, users and permis...	More information
<input checked="" type="checkbox"/>	Order Fulfillment, Finance Processes	Supply Chain Management.	More information
<input type="checkbox"/>	Quality Management	Supplier Quality Management (QM).	More information
<input type="checkbox"/>	Sales	Sourcing to Contract, Progress to Order ...	More information
<input type="checkbox"/>	Shipping, Goods Receipts, Warehouse ...	Shipping, goods receipts, warehouse ma...	More information
<input type="checkbox"/>	Supply Chain Administration	Demand, logistics and finance processes.	More information

Figure: **User Management** with **Edit User** and **Areas of responsibility**

After clicking **More information**, the following help page is displayed. Here you can see the tasks the user can fulfill with this responsibility.

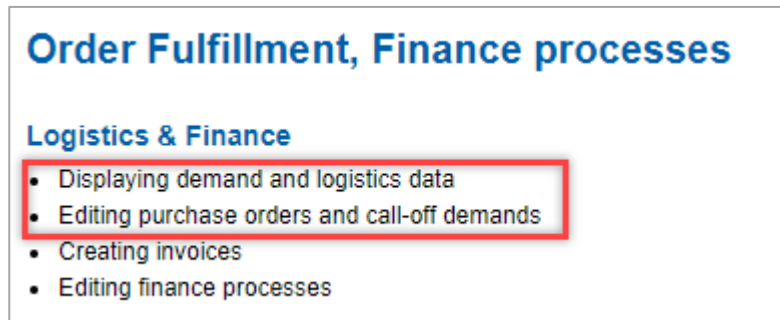


Figure: **Help page** with explanation for **Order Fulfillment, Finance processes** responsibility