# Table of Contents

Table of Contents ................................................................. 1
How to Get Started ............................................................. 3
Viewing Orders ................................................................. 6
Processing Orders ............................................................. 12
Exporting Orders ............................................................. 16
Printing Orders ................................................................. 18
Setting Preferences ........................................................... 19
FAQs ................................................................................. 22
What is the Supply Order?

Supplier Order Management is a hosted, secure, Web-based e-commerce management application. It enables suppliers and service providers to conduct a wide variety of transactions online. Suppliers can manage purchase orders, accounts, and shipping for multiple buyers.

How to begin

After the buyer invites you to register with Perfect Commerce and your registration is completed, you will receive a personal login ID and password. Once you have the ID and password, you can proceed with receiving orders through Supply Order. If you choose to receive email notifications on orders, you will need to use the preferences section of this manual.

How to Get Started?

Open your internet browser. Type www.perfect.com in the address line of your browser and click Go.

Click the Login link in the upper right hand corner of the page.
Select the **Perfect Commerce Log In** link.

Type your username and password into the specified text boxes, click the word **Proceed**. If you forgot your password, enter your user ID and click **Forgot Password?** link.
Click on the OSN link or tab to access the Supply Order portion of the tool.
Note: You can click the words Personalize Links and choose the quick links that you would like on the menu for your Home page.

There are links to various tools on this page. Click the word Go, next to the words Check Your Sales to access the Supply Order Management Tool.
Viewing Orders

This is the Home Page for Supplier Order Management. From the Home Page, there are numerous ways to find and view orders (which include blanket orders and change orders) and other documents. To view all New Orders, from the Statistics section of your workspace, click the New Orders link.

The Order Management page appears. It displays: Status of New Order with basic header information for each order: Order Number, Sender, Account Code, Status, Order Date, and Total Cost and Currency. There is also an Action box with icons to:

- View
- Export
- Print
- History*

*(If you're looking at an order that was already processed)
You can further refine your search by entering search criteria in the **Search** section of the page. In the **Start Date** field, select **June 01, 2004** and in the **End Date** field, select **June 1, 2004**. Click on the drop down arrow to the right of the **Status** field. Select **All**, to find all orders for the period of June 1, 2004. Click the **Search** button to run the query.

The search results are now sorted by status. In the column header the sort triangle represents the order (▲ Ascending Order ▼ Descending Order). To view the details of any given order, select the View icon in the Action box. The screen will refresh and display the details of that order.
There are many details available to you on the Purchase Order page for each order. Additional details can be viewed by clicking the roll-down icon for each section of the Purchase Order.

Buyers use Attachments to provide additional information with an order. An Attachment may be a document or multimedia file. When a Purchase Order contains an attachment, the icon will display in the Attach field, next to the Order Number. In this example, Order Number 11974-4-2 has an attachment file that pertains to the entire Purchase Order.
In the order details, there is an Attachments section. Click the roll-down ▼ icon to view attachment details.

In the Attachments section, under the Filename section, a list of files that are attached is displayed. There is a download link to download and view the attachment file. Click the Download link to view the attachment.
A File Download box displays. You can select **Open** to open this file from its current location to view the attachment contents, or select **Save** to save this file to disk to save the file locally.

Smart Forms provide a structured format for providing specific, customized information about a product or service. These attachments are often used for such commodities and services as business cards, temporary labor and clothing. When a Smart Form pertains to a specific line item, a **Smart Form** hyperlink will appear in the Action box. Click on the Smart Form link to view the **Smart Form**. Close the window to exit the **Smart Form**.
If an order has been accepted, you can view the history of the order. Search for the Purchase Order from the Supply Order Home and click the History icon.

History of all activity for current orders will display. You can view the original order, change orders, and order responses. To View additional details within the history of an order, click on the view icon in the action column.
This will show the detail of the order and what changes were made to the order.

<table>
<thead>
<tr>
<th>Process</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Valid Supply Order Management order statuses are set at both the header and the line item level. The Supplier can change any status, with the exception of an order that is cancelled by the Buyer.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Valid Supplier Order Management order statuses are:</strong></td>
<td></td>
</tr>
<tr>
<td>New Order</td>
<td>Supplier has not yet processed the order</td>
</tr>
<tr>
<td>Accepted</td>
<td>Supplier accepts the order or item exactly as submitted by the Buyer</td>
</tr>
<tr>
<td>Accepted with Changes</td>
<td>Supplier accepts order with his own changes</td>
</tr>
<tr>
<td>Not Accepted</td>
<td>Supplier rejects the submitted order, due to price discrepancy or unavailability</td>
</tr>
<tr>
<td>Processing</td>
<td>Supplier has received the order and is reviewing it</td>
</tr>
<tr>
<td>Completed</td>
<td>Buyer has received goods and Supplier has received payment</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Supplier cancels order, or Buyer has cancelled the order using a Change Order request</td>
</tr>
<tr>
<td>Prepayment Required</td>
<td>Supplier requires payment in advance before shipping and fulfilling the order</td>
</tr>
<tr>
<td>Other</td>
<td>Used when supplier has created customized order statuses. The customized status displays in another field (only used when existing fields are inadequate).</td>
</tr>
</tbody>
</table>
To update the status of an order, click on the words **New Orders**.

For the order number that you would like to use, click the View icon on the right of that line item to view the order details.
After viewing the details and determining that the order is correct, enter the Supplier Reference Number in the Supplier Reference No. field, change the status in the dropdown to Accepted, and click the Send Document button. After the screen refreshes you will see a message that states: "Your order has been updated and an Order Response sent to the customer", at the top of the page.

On the Order List page, notice that some orders have an exclamation point (!) in the Special Attention (!) column. Click the View icon to view the order details for the desired order number.

You will notice the message at the top of the page – "Purchase Order has encountered a problem: Availability/Price". This means that the price submitted by the Buyer does not match the price stored by the Supplier. This message can also include Quantity and Contract (for Blanket Orders) issues as
well. In this example, the Supplier has turned on the Auto Validation feature which pre-populated the Supplier Price and flagged the Purchase Order as needing attention when the two fields were out of synch. Scroll down to the Line Item Summary section of this Purchase Order and click the Edit icon to view the line item details.

Notice for line item 1, the Price being used by the Buyer does not match the Supplier Price. The Supplier has at least two choices:

1. You can accept the Buyer’s price by marking the Purchase Order ‘Accepted’ and submitting a Purchase Order Response to the Buyer, or;

2. You can accept the Purchase Order contingent upon the Buyer agreeing to the Supplier Price. You would do this by leaving the Supplier Price fields populated with the desired price, changing the Purchase Order status to Accepted with Changes and submitting a Purchase Order Response to the Buyer. Click the Save (1) button to continue. The information will be saved. Click the Back to PO (2) button to continue.

To accept this order, change the Status from New Order to Accepted (1). Supplier Reference Number is a required field. Suppliers typically use this field for a sales order number, or some other unique
purchase order identifier. After entering the Supplier Reference Number (2), click **Send Document (3)** to send the Purchase Order Response document. A message: “**Your order has been updated and an Order Response sent to the customer**” is displayed at the top of the details screen. To correct the Price problem, either the buyer needs to update their pricing, or the supplier needs to update their pricing for the account in the catalog/price templates and submit through the CCM Tool.

---

**Exporting Orders**

From the Supply Order Home Page, search for the Purchase Order you wish to Export. The file can be exported in **XML 3.5 format**. The file displays in the browser from which you can save or copy the page. Click the Export icon located within the Actions column.

A dialog box will open with the Export format of XML. Click the **Download** button to continue.
The order details will display with the XML detail. To save the contents locally, select File, Save As, and save the file with a .txt or .htm extensions.
Purchase Orders can be printed from your browser to a PDF format. To print an order, search for the Purchase Order from the Supply Order Homepage. Click on the Print icon located within the Actions.

Click the Print button to continue.
The Order will appear in PDF format in a new browser window where you can click the Printer icon button to print the order.

Setting Preferences

User Preferences are accessed under the Settings section in the quick access area on the left of your Workspace. You must have administrative privileges in your organization to access Preferences. Click on the Preferences link to continue.
User Preferences allow suppliers to configure several Supplier Order Management features. General Preferences are preferences set across all modules. Suppliers can select:

- Maximum Items Displayed based on search results
- Decimal Settings

### General Preferences

<table>
<thead>
<tr>
<th>Preference</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Items Displayed</td>
<td>10 lines</td>
</tr>
<tr>
<td>Decimal Settings</td>
<td></td>
</tr>
<tr>
<td>Minimum Quantity Decimals</td>
<td>3</td>
</tr>
<tr>
<td>Maximum Quantity Decimals</td>
<td>3</td>
</tr>
<tr>
<td>Minimum Price Decimals</td>
<td>3</td>
</tr>
<tr>
<td>Maximum Price Decimals</td>
<td>3</td>
</tr>
</tbody>
</table>

### Order Management Preferences

<table>
<thead>
<tr>
<th>Preference</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>Email Notification Regional Settings</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Central Standard Time</td>
</tr>
<tr>
<td>Auto Notification</td>
<td></td>
</tr>
<tr>
<td>Order Notification Interval</td>
<td></td>
</tr>
<tr>
<td>Auto Validation</td>
<td></td>
</tr>
<tr>
<td>Auto Process</td>
<td></td>
</tr>
<tr>
<td>Receive Change Order</td>
<td></td>
</tr>
<tr>
<td>Change Order Notification Interval</td>
<td></td>
</tr>
<tr>
<td>Auto Cancel Order</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Email addresses for incoming notification are case-sensitive. Email addresses are validated prior to being used. External email addresses are available in Open Supplier Network. When using external email addresses, ensure you select the correct Country, Language, and Time Zone.
Email Address
Suppliers can enter an email address and choose to be automatically notified when new purchase orders or change orders have arrived. This field is required if Auto Notification is set to ON or Receive Change Order is set to ON + Automatic email notification.

Email Notification Regional Settings
Locale settings that affect your email notifications only. Choose a value for Country, Language and Time Zone.

Auto Notification
Supplier can enable automatic email notifications about incoming orders.

Order Notification Interval
Suppliers can also set the interval between notifications or choose to receive them immediately. For example, if you select a notification interval of 30 minutes, you will receive an email every 30 minutes listing all purchase orders received during that time. If you choose a shorter interval, you receive more emails, with fewer purchase orders listed per email. Therefore, the Notification Interval you choose depends on:

- How many emails you want to receive
- How quickly you need to be notified of incoming orders
FAQs

1. How do I know if I have an order?

You may login to Supply Order and review your orders. The summary screen will list any new orders that have not been changed to a different status. If you would like to receive an automated notification, you can change your preferences to receive an email when an order arrives in your inbox. This feature is defaulted to not send any notification upon new set up.

2. How do I see additional orders, if it is only displaying the first ten orders?

On the upper right hand corner of the display section of your screen, there are arrows. These will take you one by one, or page by page through the orders.

3. How can obtain help on using this tool?

Contact Supplier Support for further assistance by either:

Service Desk – http://servicedesk.perfect.com

Phone – 866-889-8533

Email – SupplierSupport@perfect.com