



## Supplier User's Guide

### Introduction

The supplier portal is a web base tool provided by AdelWiggins Group. It allows you to see the items they expect you to deliver to them, along with delivery dates, quantities, and supporting information such as comments, drawings and specification of documents. It allows you to confirm whether you can deliver per their request. If you cannot, it allows you to propose alternate delivery dates and quantities, which your customer can accept or reject. Finally, the Supplier Portal lets you provide advance notice that a product has shipped.

### Signing On

Before you go any further, you should have a URL (<https://www.catavolt.net/adelwiggins>) along with UserID and password. You also need access to the Internet via a standard web browser such as Internet Explorer, Firefox, Opera, Chrome.

If you have the URL you can type it into your web browser to bring up the sign-on page. You should add this page to your book marks or favorites if you plan to use the Supplier Portal regularly.

Once the sign-on screen appears, enter the UserID and password you were given. This will take you to the list of Purchase Orders.

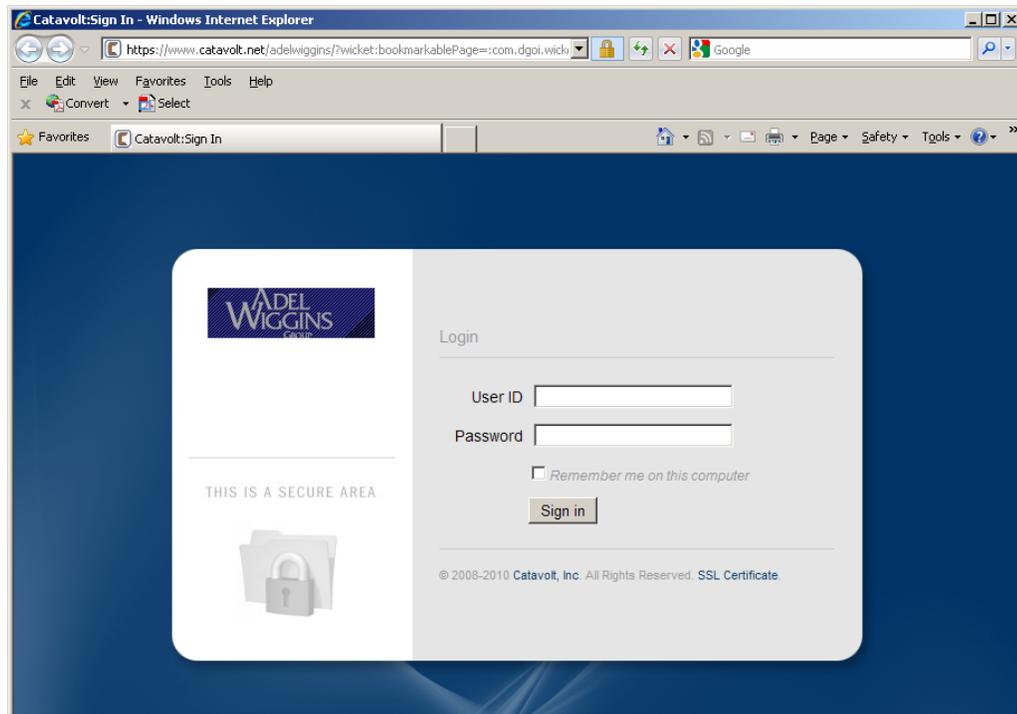


Figure 1: Sign-on Window in Internet Explorer

## Working with Lists

When you first sign on you see a list of Purchase Orders. Each line is a PO line item or release. This is a very common way to view data. Generally, you will see a list when you click on an icon. For example you can click the Forecasts icon on the left to see a list of various items and their expected demand over the year.

## Tabs

Your data is organized into tabbed panels. A new tabbed panel is opened automatically when you click an icon. You can navigate to another tabbed panel by clicking the tab. You can navigate to another tabbed panel by clicking the tab. You can close the tabbed panel by clicking the red X: There are two red X's on the tab, one on the tab itself and one in the upper right-hand corner of the panel.



## Changing the sort order

The list of orders shows the lines and the releases for the highest number PO first. Thus, a new PO will show up at the top list. You may want to change this, such as to show the orders in due date sequence.

### Sort on one column

To change the sort order, hold the Control key down and click the heading of the primary sort field. You will see "1 ▲" appear heading. This indicates that this column is the primary sort column in ascending (low to high) sequence. If you want it the other way, simply keep holding the Control key down and click it again. You will see "1 ▼" in the heading, indicating a descending (high to low) sequence.

### Remove a column from the sort

To remove a column from the sort, press and hold the Control key while you click the heading until the number and triangle disappear. Be sure to hold the Control key down the whole time. Also, don't click too fast; give the system time to re-sort after each click.

### Sort on multiple columns

You can make a second column a secondary sort. In other words, you may want to sort by date and then by status within date. To do this you simply hold the Control key down while you click the columns you want to sort on. Start with the primary sort column, and click it until it shows the correct sequence (ascending or descending). Then click the second column, etc. Be sure to hold the Control key down the whole time, and give the system time to re-sort after each click.

## Change the filter

You may also wish to work with a subset of the records, such as only new orders. To do this, click the heading. (This is a regular click, not a Control click.) A special dropdown appears which allows you to enter information for each column. For example, you can enter "New" in the Status column.

As soon as you start typing you will see a dropdown list of comparisons: *Contains*, *Equal*, etc. *Contains* is the default because it is what most people want most of the time. Here is how they all work:

- *Contains* – If what you type appears anywhere in the field, that field will be included in the list. This is a good choice for name and description fields.

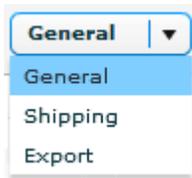
- Equal – The field must equal what you type. This would be a good selection if you wanted to look for all orders for a certain item.
- Not equal – It excludes the records that have the value you put in. This would be helpful if you wanted to exclude, say, all shipped lines.
- Greater/Less than – Shows all the records that have a value greater/less than what you enter. This is helpful if you want to see all the orders before or after a certain date.
- Start/Ends with – Shows all the records with a value that starts/ends with what you enter. This is more specific than *Contains* and can result in fewer records.

## Action menus and toolbar

There are two ways to perform actions on PO lines and releases. One way is to use the toolbar above the list. The other way is to use the right-click menu. The one you choose to use is a matter of preference; the actions do the same thing either way.

## Views

One feature of the toolbar is the ability to change the columns by selecting a different view. There are three views that come with the product:



- General – Identification of the line or release plus proposed changes. This is the default view, and the one that you will use during the conversation<sup>1</sup>.
- Shipping – Includes data entered when the product was shipped, such as the actual ship date, carrier and tracking number.
- Export – If you want to export the PO information to a spreadsheet, use this view, because it contains most of the data on the PO. For more information on exporting see the *Export* section later in this document.

Your customer can add or remove columns from views. You should let them know if the views show the most helpful information for you.

When you change the view, the system reads the data from the customer's ERP system. This is an automatic refresh of the data.

## Refresh

Sometimes you need to update the data immediately. For example, the Portal may have been idle while your customer made changes. When you refresh the data the Portal will re-read the data and give you the real time results from the customer's ERP system.

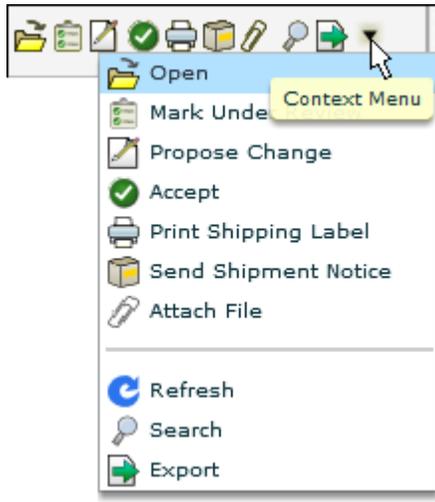
The *Refresh* action is located in the context menu, indicated by a small triangle at the end of the toolbar. Click the triangle to show the menu, and then click *Refresh*.

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<sup>1</sup> The “conversation” is the communication that transpires between you and your customer. It starts when the customer enters an order. It ends when you accept the order. In-between there can be many back-and-forth steps...proposals, counter-proposals, reviews, etc.

## Export

To export the data to a spreadsheet, click the Export icon on the toolbar. Or you can click the triangle at the end of the toolbar to show the context menu, and click *Export*.



**Figure 2: The context menu**

What happens next depends on how you have your browser configured, and what you have installed on your PC.

The data you are looking at will be converted to a comma-separated value file (.csv) on the Catavolt server. Our server will ask your browser to open the file. Your browser will look at your operating system to see what application is associated with a .csv file extension. That application then opens with the data from our server.

The following settings will affect the way this feature works:

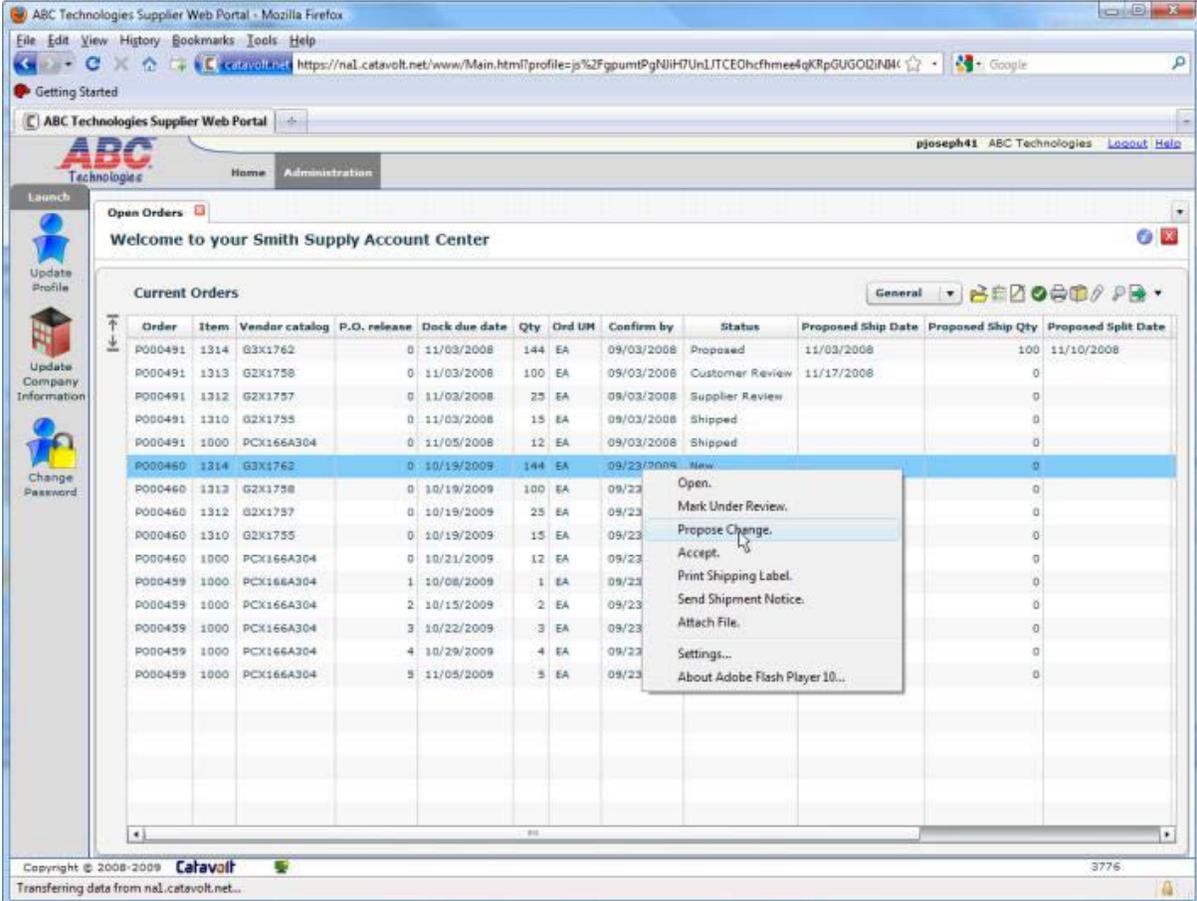
Browser settings – When you run the export function your browser may give you an option to *Open* or *Save* the file. It may also provide a checkbox to skip this option in the future.

Operating System settings – The OS will associate an application with the csv file extension. If you have Microsoft Office installed the association is probably to Excel. If you have Open Office installed the association is probably be to that spreadsheet application. The association may be to something else altogether, such as a simple text application.

In order to export your data from the Supplier Portal to a spreadsheet, you will need a spreadsheet application installed and associated with the csv file extension.

## Working with Purchase Orders

When you first sign on you see a list of Purchase orders. Each line is a PO line items or release. When your customer enters a new Purchase Order, the line items and releases will appear in this list immediately.



The screenshot displays the 'ABC Technologies Supplier Web Portal' in Mozilla Firefox. The page title is 'Welcome to your Smith Supply Account Center'. A table titled 'Current Orders' lists various purchase orders. The table has columns for Order, Item, Vendor catalog, P.O. release, Dock due date, Qty, Ord UH, Confirm by, Status, Proposed Ship Date, Proposed Ship Qty, and Proposed Split Date. A context menu is open over the row for Order P000460, showing options like 'Open', 'Mark Under Review', 'Propose Change', 'Accept', 'Print Shipping Label', 'Send Shipment Notice', 'Attach File', 'Settings...', and 'About Adobe Flash Player 10...'.

Order	Item	Vendor catalog	P.O. release	Dock due date	Qty	Ord UH	Confirm by	Status	Proposed Ship Date	Proposed Ship Qty	Proposed Split Date
P000491	1314	G3X1762	0	11/03/2008	144	EA	09/03/2008	Proposed	11/03/2008	100	11/10/2008
P000491	1313	G2X1758	0	11/03/2008	100	EA	09/03/2008	Customer Review	11/17/2008	0	
P000491	1312	G2X1757	0	11/03/2008	25	EA	09/03/2008	Supplier Review		0	
P000491	1310	G2X1755	0	11/03/2008	15	EA	09/03/2008	Shipped		0	
P000491	1000	PCX166A304	0	11/05/2008	12	EA	09/03/2008	Shipped		0	
P000460	1314	G3X1762	0	10/19/2009	144	EA	09/23/2009	New		0	
P000460	1313	G2X1758	0	10/19/2009	100	EA	09/23	Open.		0	
P000460	1312	G2X1757	0	10/19/2009	25	EA	09/23	Mark Under Review.		0	
P000460	1310	G2X1755	0	10/19/2009	15	EA	09/23	Propose Change.		0	
P000460	1000	PCX166A304	0	10/21/2009	12	EA	09/23	Accept.		0	
P000459	1000	PCX166A304	1	10/08/2009	1	EA	09/23	Print Shipping Label.		0	
P000459	1000	PCX166A304	2	10/15/2009	2	EA	09/23	Send Shipment Notice.		0	
P000459	1000	PCX166A304	3	10/22/2009	3	EA	09/23	Attach File.		0	
P000459	1000	PCX166A304	4	10/29/2009	4	EA	09/23	Settings...		0	
P000459	1000	PCX166A304	5	11/05/2009	5	EA	09/23	About Adobe Flash Player 10...		0	

Figure 3: Purchase Orders

When an order is first created it has a status of "New". Your objective is to first accept is to first accept and then ship the orders. The simplest scenario is when you simply accept the customer's order as-is. When you can't do that, you may propose a different quantity or date. The customer may accept your proposal or make a counter proposal. Eventually you hope to reach a date and quantity that you can accept. The end result is always your acceptance. You may make a proposal that the customer accepts. You still need to accept it as the final step. This may seem redundant, since you proposed the change. However, something may have happened since your proposal, especially if the customer is not prompt in their acceptance, so your confirmation is still required.

The Purchase Order always starts with the customer's request. It always ends with the supplier's acceptance. It may go back and forth a few times, but it always ends with the supplier's acceptance.

The way you work with Purchase Orders is through *actions*. Each action results in a new *Status*. The next section discusses the actions you take in order to accept the Purchase Order line or release.

## **Working with Forecasts**

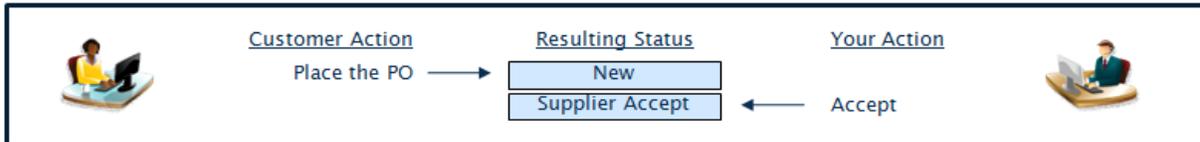
When you first sign on you see two icons on the left-hand side of the window, one for Open orders and one for Forecasts. If you click the Forecasts icon you will see a new tabbed panel containing forecast data.

The forecast is a list of the items your customer purchases from you. For each item it shows the open and planned Purchase Orders, summarized by month, for the coming year. Your customer supplies this information to you from their planning system.

No action from you is expected or required with regard to forecasts. Most actions have been disabled. However, you can use the sorting and filtering features to find particular items in the list. You can also export this data to your own spreadsheet.

## The Customer-Supplier “Conversation”

The process of accepting a Purchase Order is a conversation between you and your customer. The process starts with the customer asking you to supply a particular quantity of a particular item on a particular date. It is your turn to reply. You may accept the order as-is, and the conversation is over. Note in the following illustrations that the status tells both parties whose turn it is to communicate:



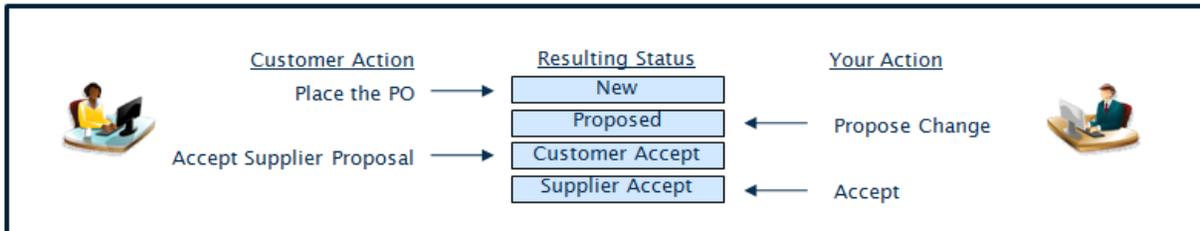
This is a very short conversation and actually, on that everyone likes. The more it works like this, the better it is for both the customer and the supplier.

However, you may know that you will not have enough of the item in stock on the date requested. As a result you may wish to propose an alternate date. When they do, they update the PO line or release with the new date and a status “Customer Accept” You can accept it like this:



As you can see, the final status of the line or release is “Supplier Accept”. This is always the last step.

You may wish to review an order before deciding if you can accept it or not. You can update the status with “Supplier Review” which simply lets customer know that you have seen the order and are looking into it. The customer has a similar action, also you may see a status of “Customer Review” from time to time. Placing an order under review is merely a courtesy to let the other party know that something is happening.



As you can see, the conversation between you and your customer can be as simple as they-order-you-accept, or it can involve communication back and forth multiple times. The Status is the indicator that tells both parties who is waiting on whom. The end of the conversation is always Supplier Accept.

## Actions that Update the Status

Please read the preceding section on the “conversation” between you and your customer. It will provide context for the actions that are used to conduct that conversation. Since the Status shows whose “turn” it is, these actions all update Status.

Some actions allow you to select multiple lines. You may select one line, then use Shift + click to select a second line, plus all the lines in-between. You may also use Control + click to select or de-select additional lines. After you have selected multiple lines, the action you take will apply to them all.



### Accept

**Resulting Status:** *Supplier Accept or Accept Cancellation*  
**Multi-select allowed:** Yes

This action performs two functions. In response to a normal order it indicates that you can deliver the requested quantity on the requests date. This is the logical end point of the negotiations. If you propose a change and the customer accepts your proposal, you should still accept the line or release to finalize it. The customer began the process when they placed the order. You, the supplier, must end the process by accepting it.

As was already stated, the above description is in response to a normal order. In response to a cancelled order this action acknowledges the cancellation. The status is updated to *Accept Cancellation* so your customer knows you will not ship the product.



### Mark Under Review

**Resulting Status:** *Supplier Review*  
**Multi-select allowed:** Yes

If you aren't sure whether or not you can accept an order or if you need to research the earliest date you can commit to, this is for you. This action is not required, but is a courtesy to your customer. Use it to indicate that you have seen the request and are considering whether you can accept it or not. Your customer will appreciate knowing that his order is getting your attention.



### Propose Change

**Resulting Status:** *Proposed*  
**Multi-select allowed:** No

This action indicates that you cannot meet the original request quantity and/or date. You can:

- Propose a different rate
- Propose a different quantity (such as to round up to a full case)
- Propose a split: ship some on the requested date and the rest later

When you select this option you get a prompt asking for quantity and date. You may change either one or both. Use the calendar control to propose a new date.

Check the box next to the split quantity to split the order. The default quantity will equal the remaining amount. If you change it you will get a warning message that the quantity of the two shipments added together is more (or less) than the requested quantity. The date will default to the Proposed Date. You can use the calendar control to change it.



## **Notify of Shipment**

**Resulting Status:** *Shipped or Shipped with Backorder*

**Multi-select allowed:** *Yes*

This is the action you take when you ship product to the customer. Your account may be set up to send shipment notices (ASN's). Shipments with ASN's require more information than shipments without ASN's.

### **Without Shipment Notice**

When you take this action a window pops up for you to enter the following:

- Carrier ID
- Carrier tracking number
- Departure date
- Item Quantities

The quantities shipped default to the quantity you promised when you accepted the line release. You may change the quantity if, for example, you discover at shipment time that you have insufficient inventory to ship the order complete. If you ship full quantity, or a partial quantity with no backorder, then the status will be set to Shipped.

When you have insufficient inventory to ship the order complete, you may enter the quantity and date when you expect to ship the rest. This will set the status to Shipped with Backorder.

### **With Shipment Notice**

Sending a shipment with a Shipment Notice allows you to enter additional shipment information:

- Shipment ID – This is usually the “license plate” of the shipment. It must be unique.
- Document origin date and time
- Departure and arrival dates and times
- Document numbers, such as for Bill of lading and Pro/Manifest
- Transport data, such as carrier, vehicle and route numbers
- Gross, net and tare weights
- Item quantities

## Supporting Actions

The following actions provide additional information as you conduct your conversation with the customer. These are single – select only, and none of them updates the Status.



### Open

Multi-select allowed: No

This action shows the comments, notes and attachments for a particular line or release. To take this action you may either

- Click the icon in the toolbar, or
- Right-click the mouse and then click *Open* on the menu

### PO Comments

After you open the line or release the customer's PO comments are shown in the upper left corner. These include comments at any level: header, line and release. These comments are unlikely to change, and in any case can only be changes by your Customer.

### Notes

See the Notes section later in this document.

### Attachments

After you open the line or release the lower part of the window shows the attachments, i.e., the media objects attached to this PO. A media object could be a PDF document, a drawing, a fax...any file that you may want to open with a viewer player.

To view an attachment, you may:

- Double click it or
- Single-click it and click the Open icon  on the toolbar.

Note: You must have the viewer or player installed on your PC, and associated with the media object's file type.

To attach your own media object:

Click the paper clip icon  in the toolbar.

The system will ask you for the file name. To find the file, click the Open icon  in the pop-up window.

What follows depends on your operating system. You should get a window that lets you select a file on your PC's file system, which could include files on the network. Find and select the file you want, and then click the button (in Vista it's labeled *Open*) to go back to the Portal.

Your file name appears in the pop-up window. Click the *Attach* button.

The file will be added to the *Attachments* list. At this point it is available to your customer.



## Print Item Label

Multi-select allowed: No

This action allows you to print bar coded labels for your customer's material handling system. When you select this option the Portal will prompt you for some data. The data it asks for depends on your implementation.

After you enter the data the bar coded label will appear as a PDF. You can print it on your bar-code-capable printer.

- You may print as many copies as you need.
- You may reprint them later
- You may do the option again and input different data

The feature is a convenience for you to provide bar-coded containers for your customer. If you have questions about the labels, contact your customer.

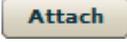


## Attach File

Multi-select allowed: Yes

This action allows you to create an attachment, i.e., a media object attached to one or more PO's. P media object could be a PDF document, a drawing, a fax... any file that you may want to open with a view player.

To attach you own media object:

- Select one or more PO lines/releases and either
  - Click the paper clip icon  in the toolbar, or
  - Right-click and select *Attach File* from the menu
- The system will ask you for the file name. To find the file, click the Open icon  in the pop-up window
- What follows depends on your operating system.
  - You should get a window that lets you select a file on your PC's file system, which could include files on the network
  - Find and select the file you want, and then click the button (in Vista it's labeled *Open*) to go back to the Portal
- Your file name appears in the pop-up window, with the PO appended to it. Click *Attach* button.  

- The file will be added to the *Attachments* list. It is now available to your customer.

## Notes

When you propose a change you may want to include an explanation. When your customer sees the proposal they may have a question, or suggest a counter-proposal. For these and other reasons, notes can be very handy.

To enter a note you need to open the line or release. The notes panel is located in the upper right-hand corner. When the order is new the notes are blank. Click [edit](#) to enter your own text. When you click the *Save* button your text is time stamped so the customer can see it, and the *Notes* indicator is updated to show the customer that you entered a note.

### Notes Indicator

There is a column on the Current Orders list that indicates whether there is a new note by either you or the customer. The values are *Supplier*, *Customer* and (blank). The indicator shows *Supplier* when you type something in the *Notes* section of an order and press *Save*.

Sometimes the column will indicate a customer note. This tells you to open the order so you can see what the customer said. When you close the order the notes indicator will be reset to blank. Similarly, the customer can reset the indicator to blank after you enter a comment.



## Changing your Password

To change your password you will need to click on Administration, which is located at the top of the window next to the customer's logo. This will display some new icons in the launch bar on the left side of the window. Click the icon labeled *Change Password*.

The system will ask you to enter your current password, as well as a new one. Asterisks will appear as you type. This is a security feature, to ensure someone else cannot see your password on your computer screen. You will have to type the new password again. If both entries match, your password is changed.

- To be sure (i.e., to make it hard to guess) a password must have several rules:
- Six characters, minimum.
- At least one letter (A-Z). The password is case-sensitive.
- At least one digit (0-9).
- One special character (not a letter or number) such as a blank, dash, period, dollar sign, etc.

If you forget your password please contact the person who gave you your original User ID and password. If they are not available, contact your customer.



## **Adding, Changing and Deleting Users**

**Requires Administrative authority**

You can create and delete users of the Supplier portal in your company if you have Administrative authority. (This authority is granted by your customer.)

You will need to click *Administration*, which is located at the top of the window next to the customer's logo. This will display some new icons in the launch bar on the left side of the window. Click the icon labeled *Update Company Information*.

The window is divided into an upper part and a lower part. The upper part allows you to change your company name and e-mail address. This name will appear at the top of the Portal.

The lower part allows you to manage users. The toolbar provides the following actions:

New – Create a new user.

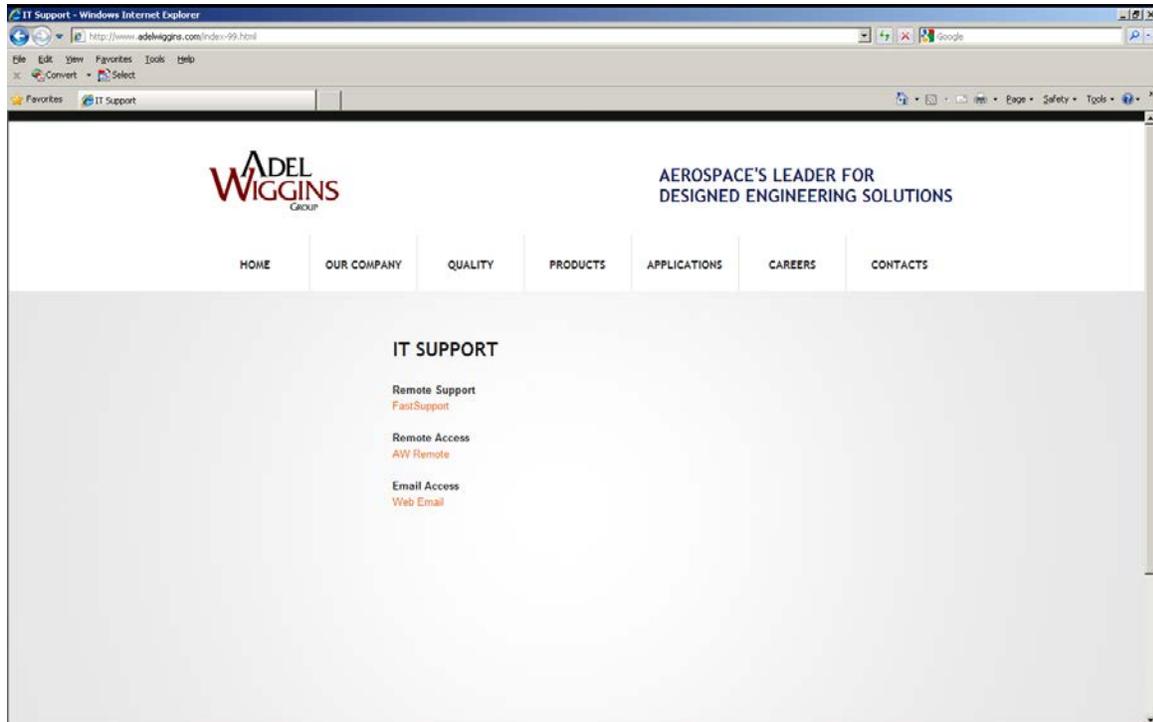
- Open – View the details of this user.
- Edit – Change the details of this user. For example, you may want to correct a misspelling.
- Activate – enables a user to work with the Portal
- Suspend – Prevents a user from using the Portal, without having to delete them.
- Change password – reset the password for another user, such as when their password is lost or forgotten.



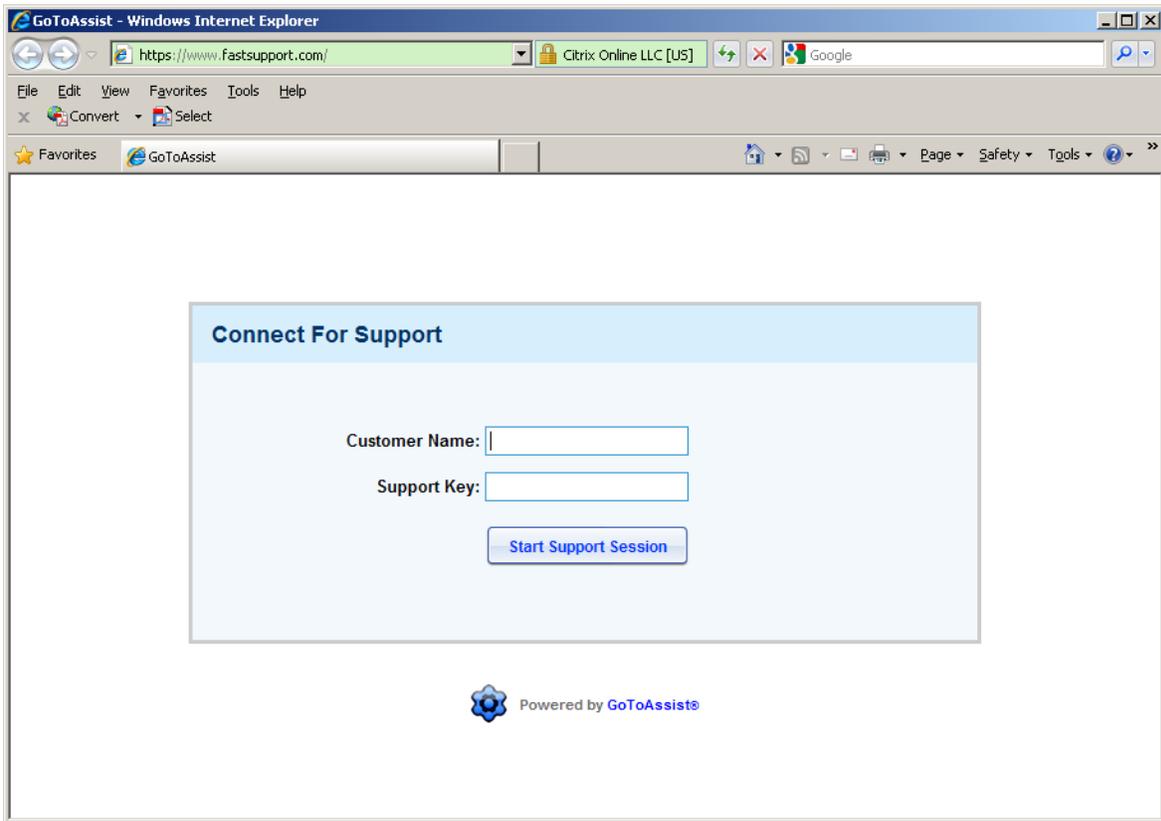
## Support

If you have any questions or need help with the Supplier Portal, please do not hesitate to call your assigned buyer/planner from AdelWiggins.

In the event you need remote help, with your permission, AdelWiggins IT staff will be able to view your computer and assist you with the troubleshooting. You will be requested to access the support site from this link: <http://www.adelwiggins.com/index-99.html>



Please click on the [FastSupport](#) link.



On the screen above, you will be given the **Customer Name** and **Support key**.