

## Zycus Supplier Network User Guide

Yellow



# Important Notice

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# Chapter 1: Introduction

Zycus Supplier Network provides a one-stop solution for managing supplier master data. It helps interested suppliers to register themselves with the buyer and enables them to manage their profile from the portal itself. Once the supplier is registered on the Zycus Supplier Network, buyer can have an easy access to operational and potential supplier details, and can easily communicate with suppliers if any additional details are required.

This, coupled with a structured workflow and approval process for managing suppliers in the master, ensures integrity of supplier master data. It also provides potential suppliers with information on how buyer companies conduct business with its suppliers and how a buyer company views supplier relationship in general.

 *A Buyer Company is the company on whose supplier network you are registering to become a potential supplier. The supplier uses the Buyer Company’s portal to manage their profile.*

Zycus Supplier Network allows the interested suppliers to see the type of information buyers require to become their suppliers and allows interested suppliers an avenue to submit their company’s information to the buyer company. Suppliers interested in offering their products and services to the buyer companies can register themselves using the Zycus Supplier Network.

If the buyer company approves of the supplier, the suppliers can view, edit, and submit their detailed profile to the buyer company through the Zycus Supplier Network and become a Potential Supplier. Furthermore, the buyer company can on-board a potential supplier and convert it into an Operational Supplier.

## 1.1 Audience

The intended audiences for this manual are the registered suppliers who want to manage their portal or suppliers who are interested in doing business with the buyer company.

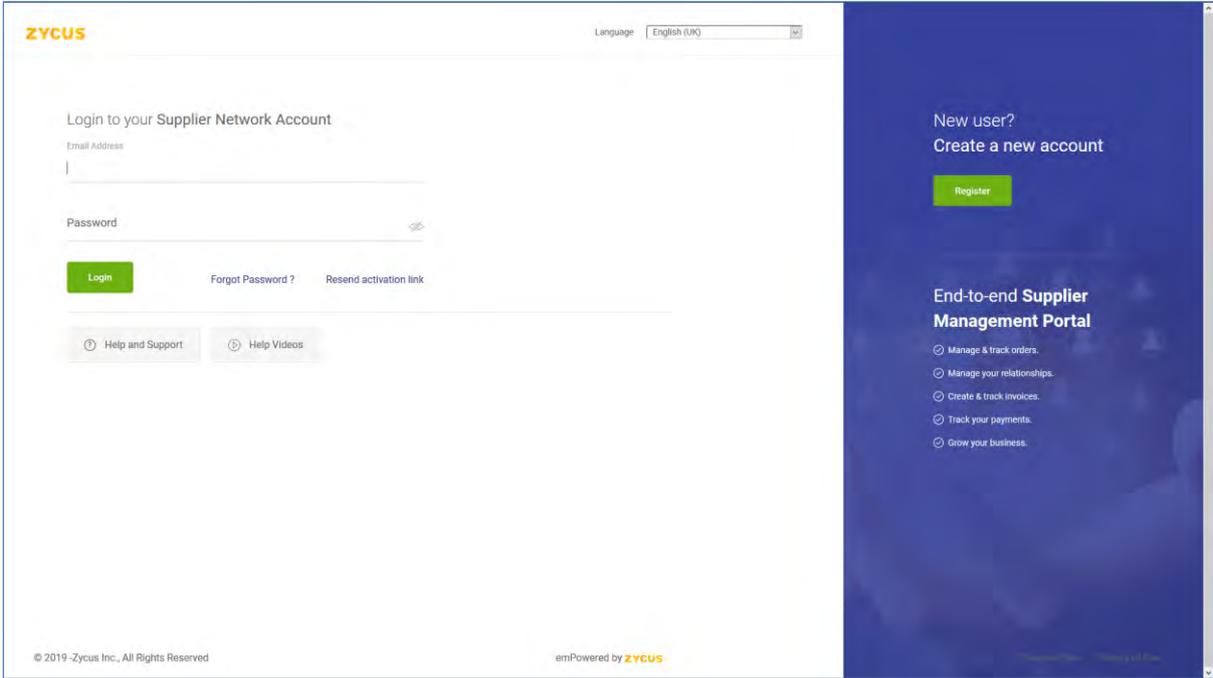
## 1.2 Purpose

This manual is designed to explain the features of the Zycus Supplier Network and provide instructions to perform the functions.

## Chapter 2: ZSN Login Page

Here's how the ZSN Login Page will appear:

1. Enter the Zycus Supplier Network link in your internet browser and press Enter on your keyboard. The ZSN login page will load as shown below:



**Note:** ZSN currently doesn't support **Microsoft Edge** and hence we request you to use the below browser versions to access your account:

Firefox support 41 or 41+ version

Chrome support 41 or 41+ version

Safari support on Mac 8 or 8+ version

Safari support On Windows 7 Or 7+ version

Internet Explorer support 10 or 10+ version

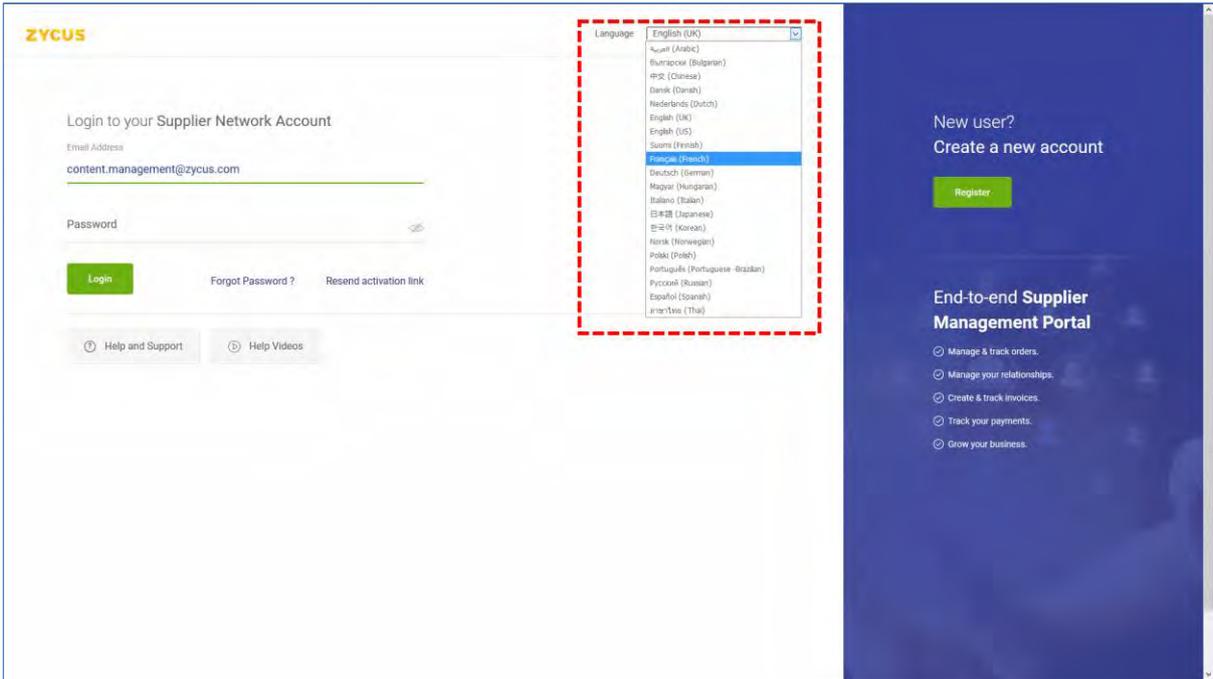
## **2.1 User Interface Language Support**

Currently you will be able to view the Zycus Supplier Network in the following languages:

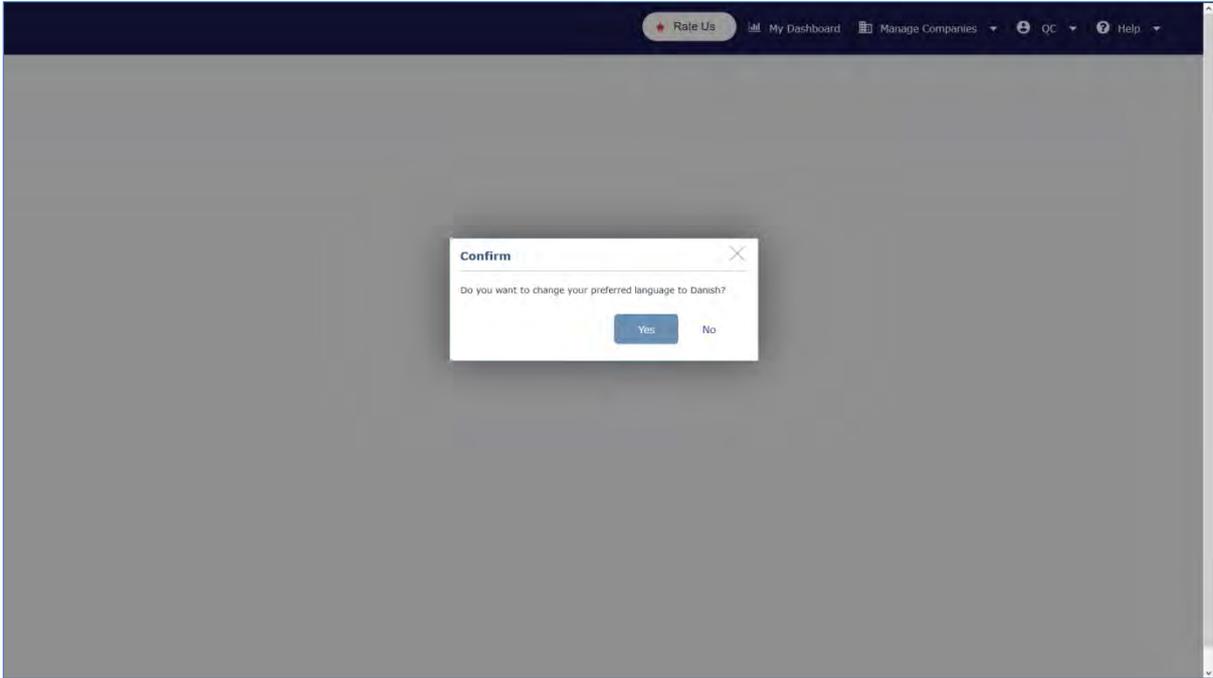
- български (Bulgarian)
- 中文 (Chinese)
- Dansk (Danish)
- English (UK)
- English (US)
- Suomeksi (Finnish)
- Français (French)
- Deutsch (German)
- Magyar (Hungarian)
- Italiano (Italian)
- 한글자모 (Korean)
- Norsk (Norwegian)
- Polski (Polish)
- Р у с с к и й (Russian)
- Español (Spanish)
- Nederlands (Dutch)
- Português - Brasil (Portuguese -Brazilian)
- 日本語 (Japanese)
- ภาษาไทย (Thai)
- ﺍﻟﻌﺮﺑﻴﺔ (Arabic)

**Disclaimer:** User interface (UI) in multiple languages will be available only for, Zycus designed user interfaces and does not include any custom fields, any data export/reports, input data, user manuals, videos, release notes, net help, central notification system (CNS), hardcoded labels in the products which will be available only in English language. However, for any product releases, or upgrades if any to the existing product versions, will be provided in English language and Zycus shall endeavour to provide multiple languages for such releases, or upgrades to the existing product, in its due course of product revamp cycle which is estimated to be of 6-month time-period.

1. The language can be chosen from the login page as shown below:



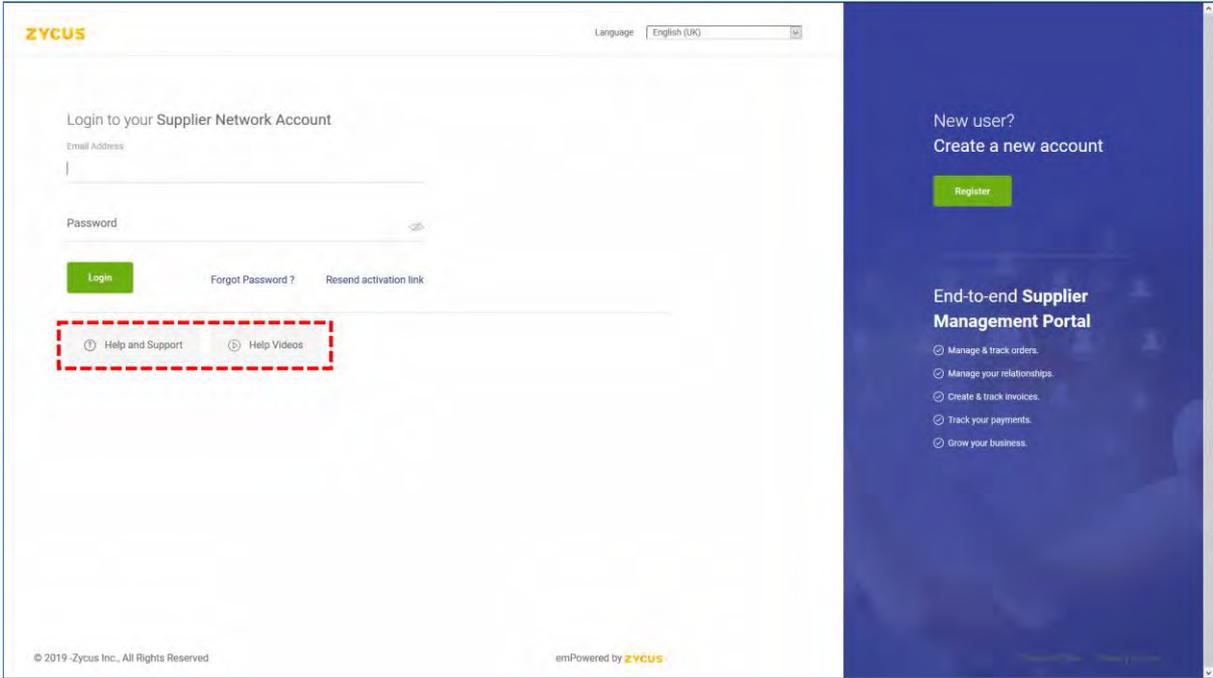
2. If you change the language from this page, ZSN will ask if you want to change the preferred language. This is because each user sets a language while configuring their profile on ZSN.



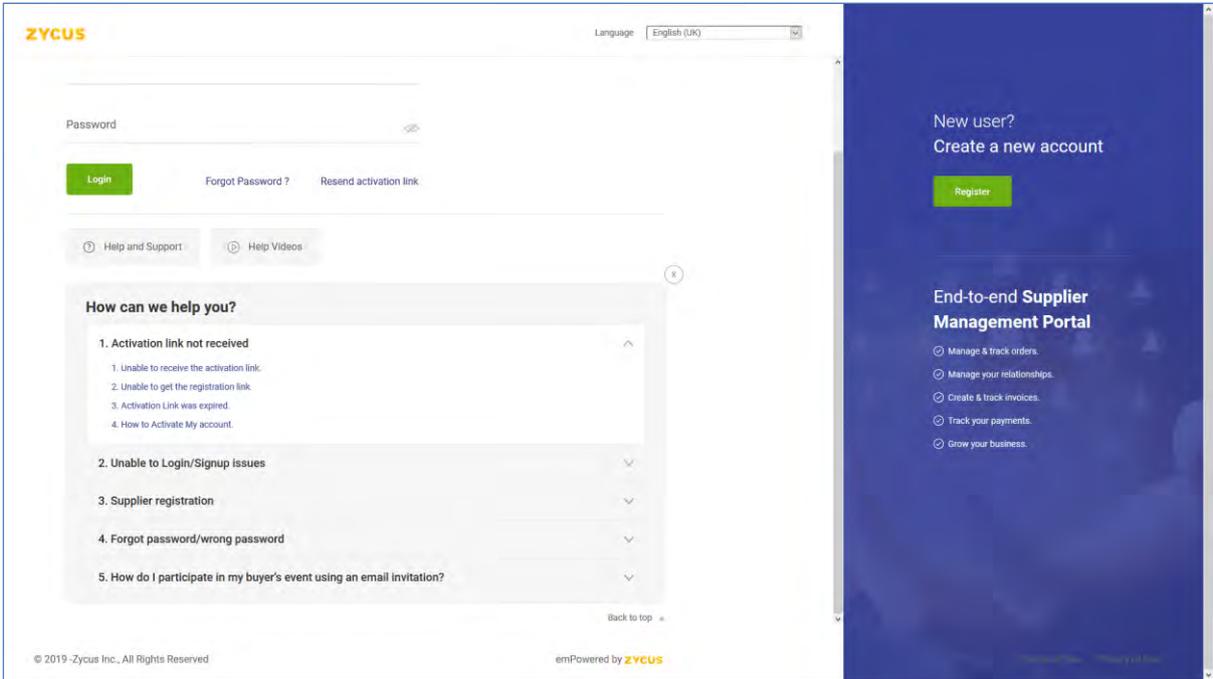
3. Click **Yes** if you want to change the language or else click **No**.

## 2.2 Help and Support

1. For assistance on ZSN, you can use the **Help and Support** section on the login page.

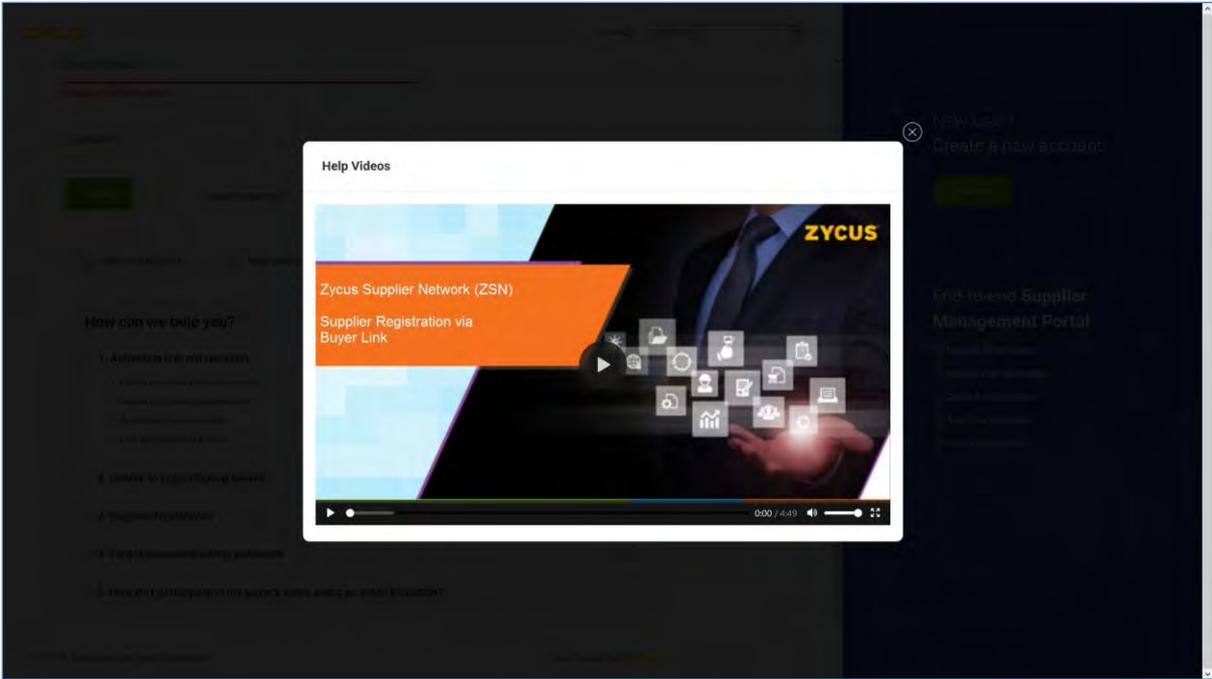


2. Click the **Help and Support** button to view frequently asked questions. The help section will collapse as shown in the image below:



3. Navigate through the sections to find relevant help.

- 4. Click **Help Video** to view help videos for registering on ZSN. Clicking **Help Videos** will open a popup as shown in the image below:

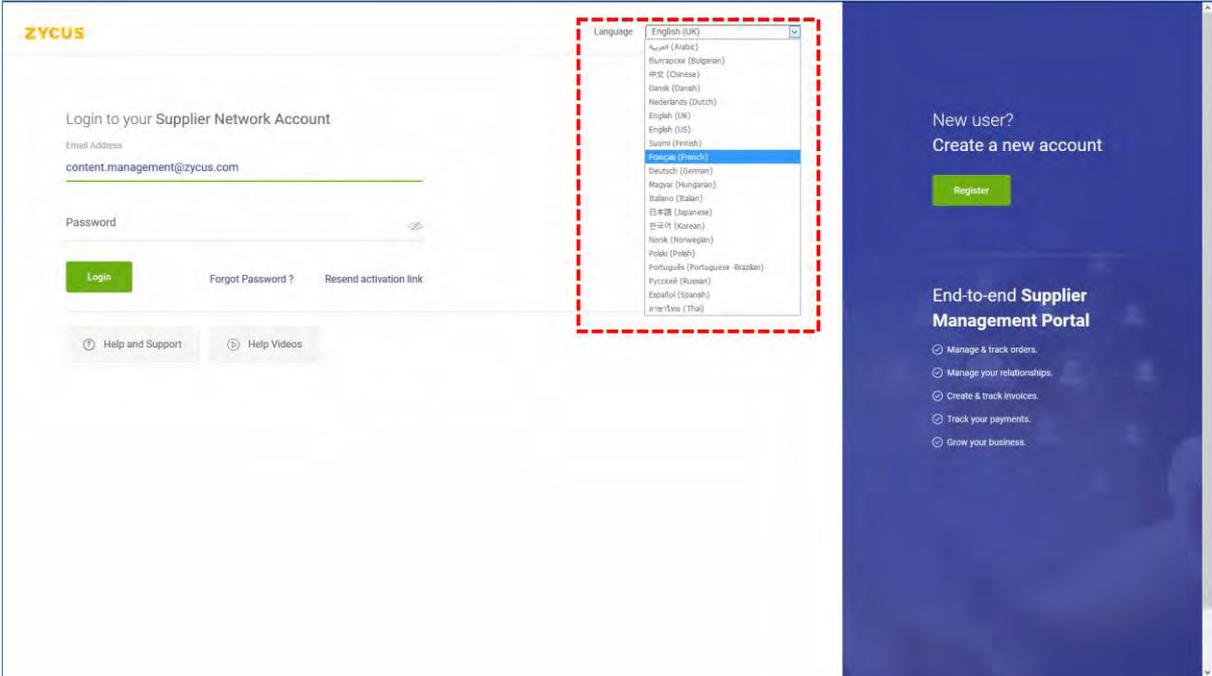


### 2.2.2 Supplier Registration Guide

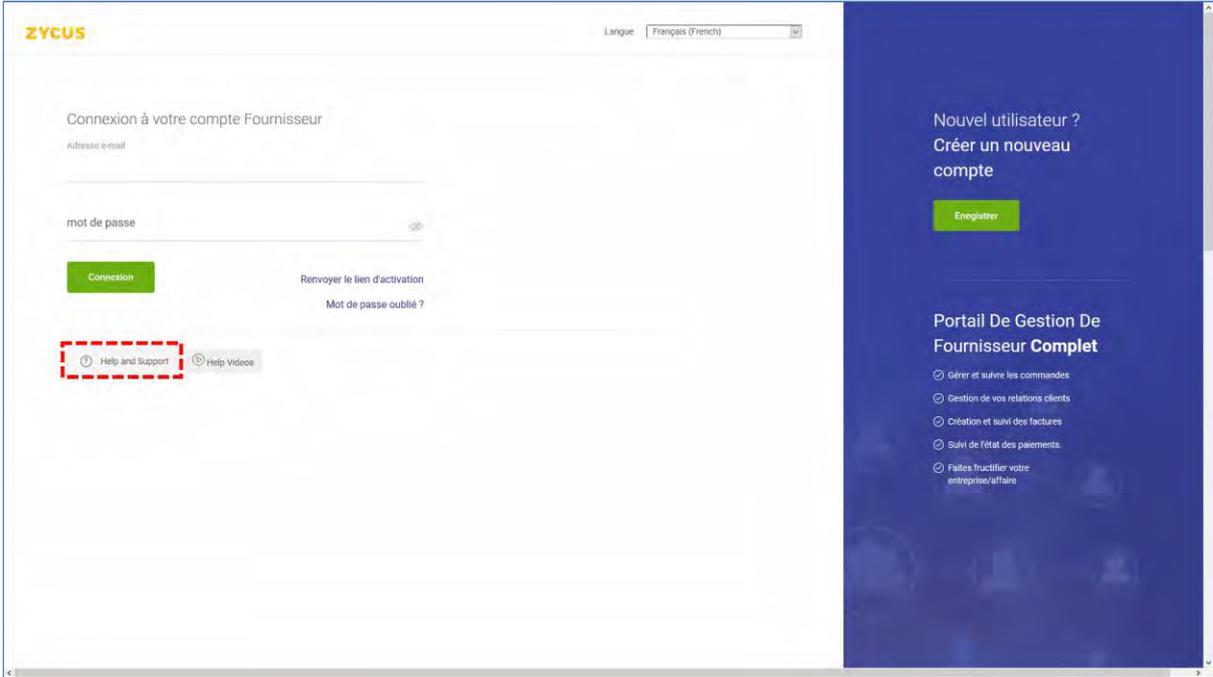
**Supplier Registration Guide**, available on the ZSN login page, will now be accessible in the above-mentioned languages.

To access this guide into the language of your choice:

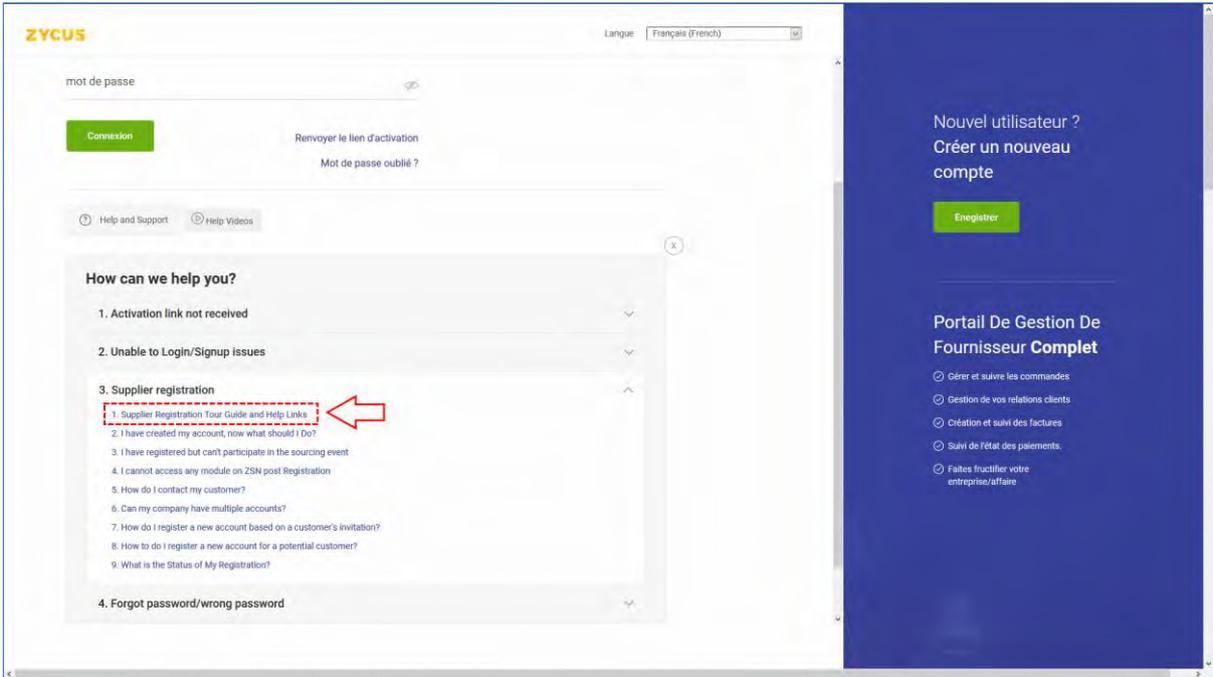
- 1. Select the locale from the login page as shown below:



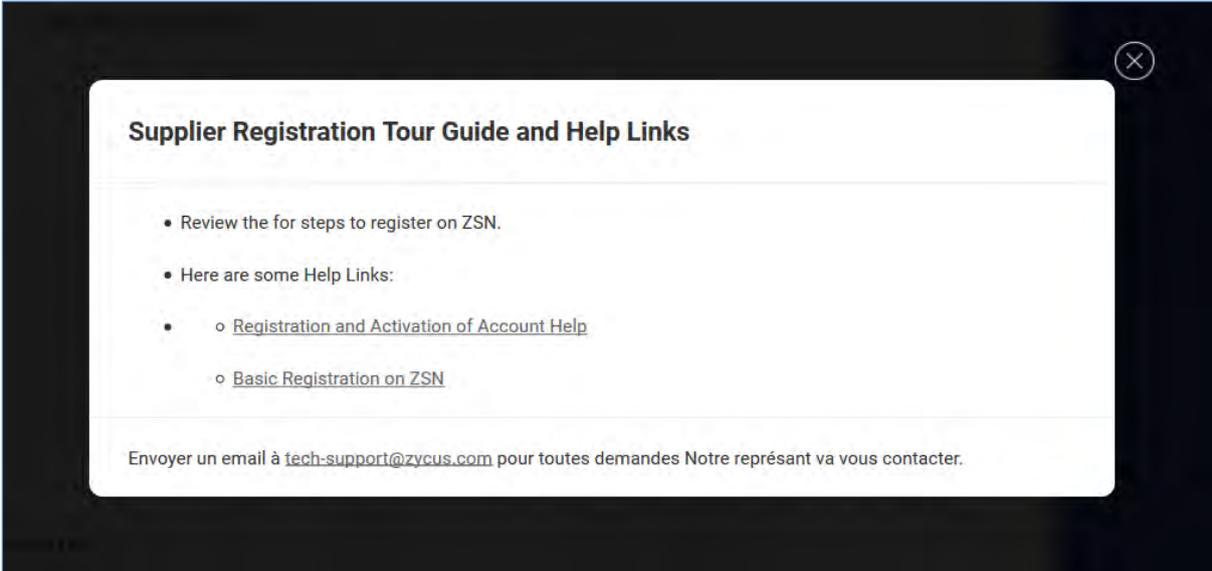
2. Go to **Help and Support**.



3. Navigate to the section of **Supplier Registration** and click the option **Supplier Registration Tour Guide and Help Links**.



4. A popup will appear as shown below:



5. Click the link to download the guides.

## Chapter 3: Zycus Supplier Network Homepage

When you login to the ZSN portal, you will be able to view **Pending Tasks** and **Cards** added on the homepage based on products to which you have access.

The screenshot displays the Zycus Supplier Network homepage. At the top, there is a navigation bar with the ZYCUS logo, user name 'Suresh', and options for 'My Dashboard', 'Manage Companies', and 'Help'. Below the navigation bar, a dropdown menu shows 'All Customers'. The main content area is titled 'Pending Tasks 332 tasks' and is viewed 'By Task'. It features three large red cards: 'INCOMPLETE TASKS' (9 tasks), 'INVOICES' (112 invoices), and 'PURCHASE ORDERS' (211 Purchase Orders). Each card has a sub-section for pending actions: 'Pending Completion' for incomplete tasks, 'PENDING SUBMISSION RETURNED' for invoices, and 'PENDING CONFIRMATION' for purchase orders. Below these cards, there are two detailed tables: 'INVOICES' and 'PURCHASE ORDERS'. The INVOICES table shows three entries with details like Document Type, Customer, Due On, and Amount. The PURCHASE ORDERS table shows three entries with details like PO Type, Customer, Released on, and Amount. At the bottom of the page, there is a footer with copyright information, contact details, and a note that the system is 'empowered by ZYCUS'.

## **3.1 Accessing Help Documents**

To help suppliers with on-boarding and conducting other activities on ZSN, ZSN will provide **Supplier Registration Guide** and **ZSN User Manual** in the following languages:

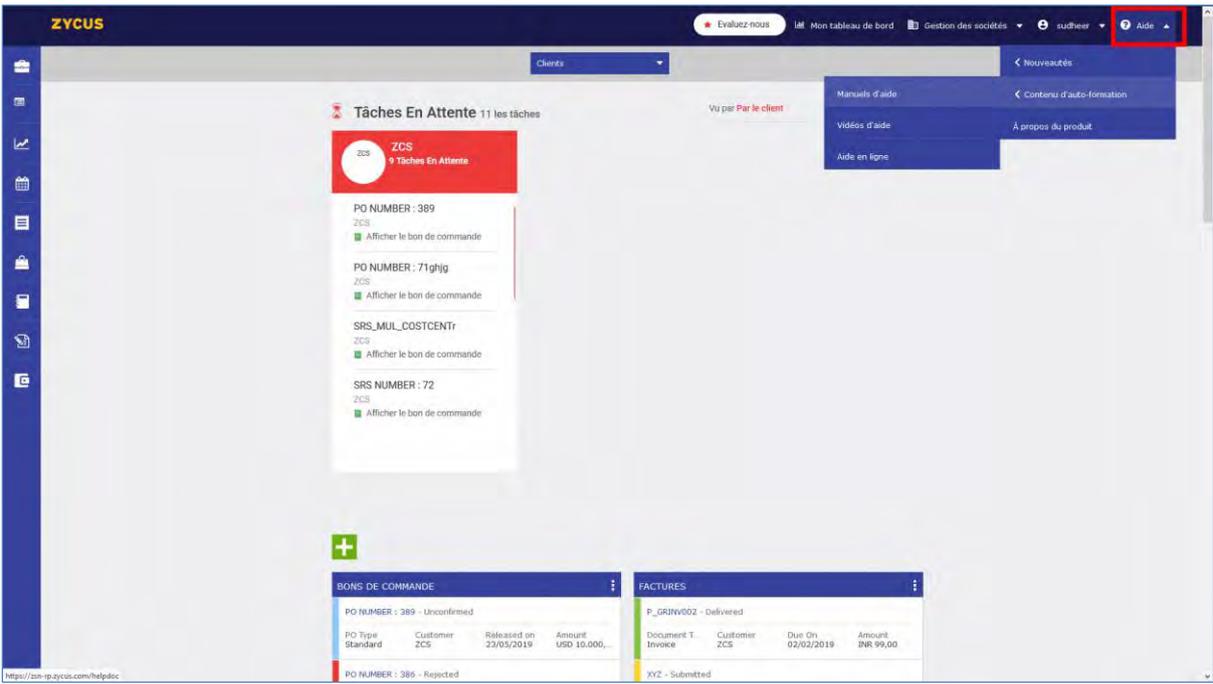
1. English
2. Chinese (Simplified)
3. German
4. Japanese
5. Portuguese (Brazil)
6. Spanish
7. Dutch
8. Russian
9. French

### **3.1.1 ZSN User Manuals / User Videos / Online Help**

#### ***3.1.1.1 ZSN User Manuals***

To access ZSN help manuals in the following 9 languages:

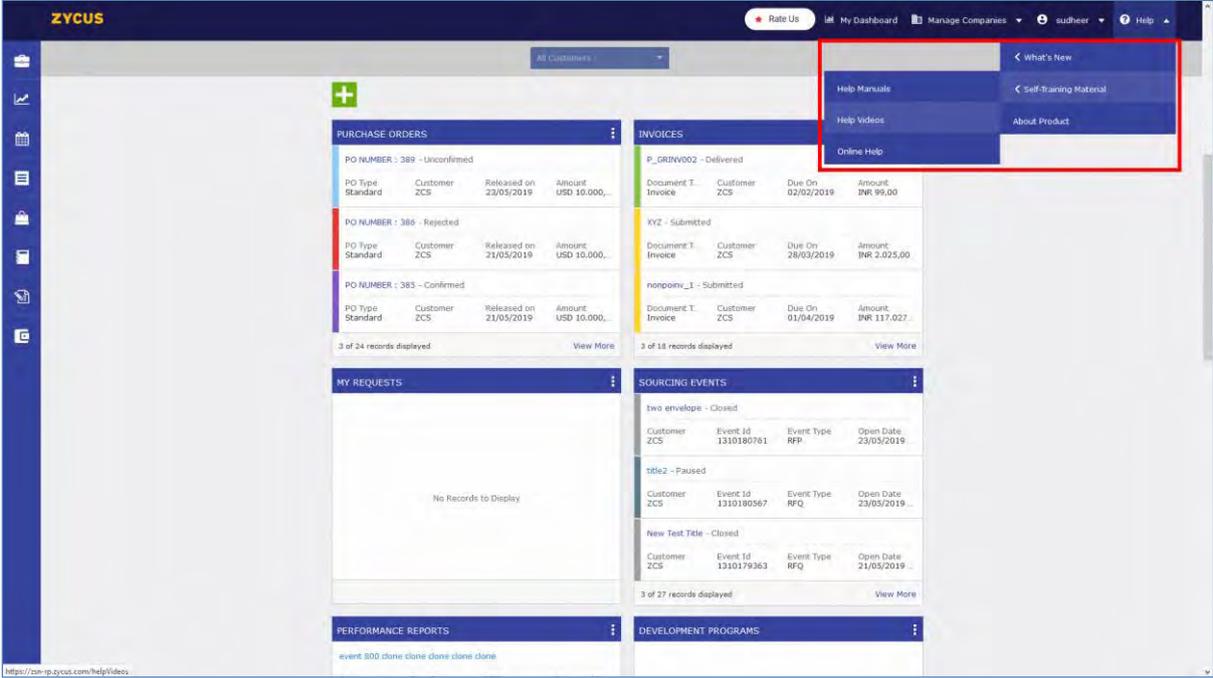
- English
  - Chinese (Simplified)
  - German
  - Japanese
  - Portuguese (Brazil)
  - Spanish
  - Dutch
  - Russian
  - French
1. Change the locale of your account (by clicking on your **user name** from ZSN header > **Settings** > **Account Settings** > **User Preferences** > **Language**) to required language.
  2. Based on the language you select; the help documents will become available in that language. Navigate to **Help** section to find the relevant help document or video.



**Note:** Above screenshot is an example for French (France) locale.

**3.1.1.2 ZSN Videos**

1. To access ZSN videos, go to **Help > Self Training Material > Help Videos** as shown in the image below:

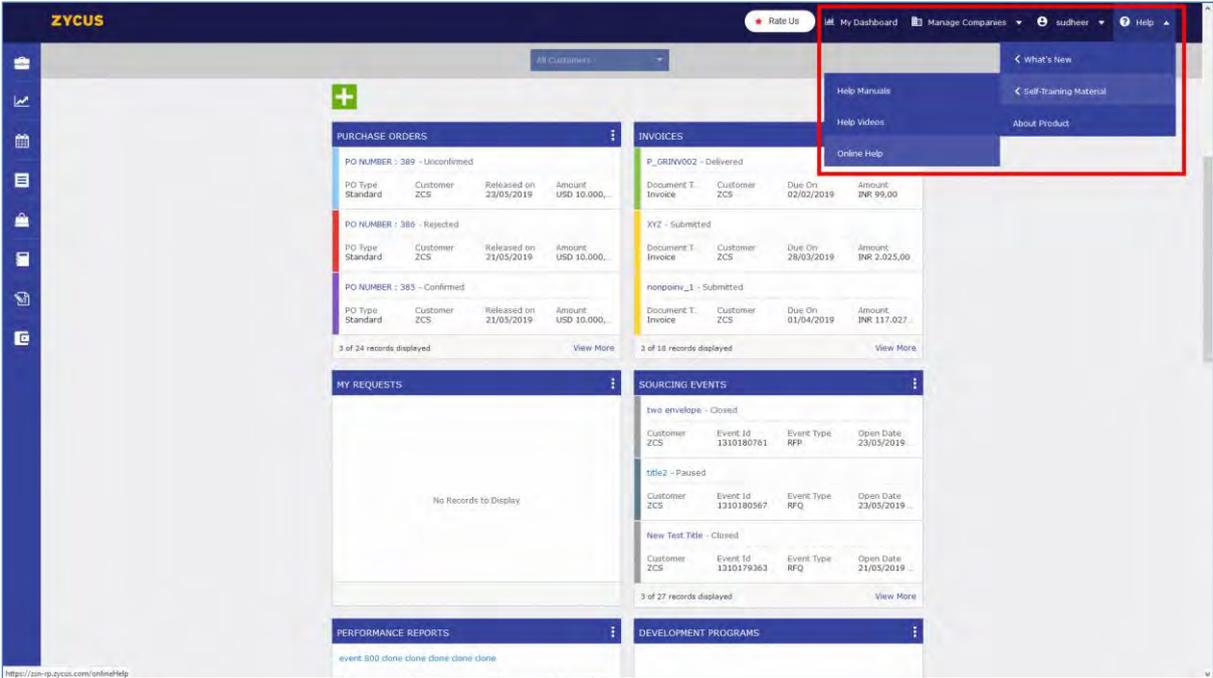


2. On the **Help Videos** page, all the videos are categorized according to the ZSN’s interaction with the Zycus suite of products. The category list is highlighted in the image below:

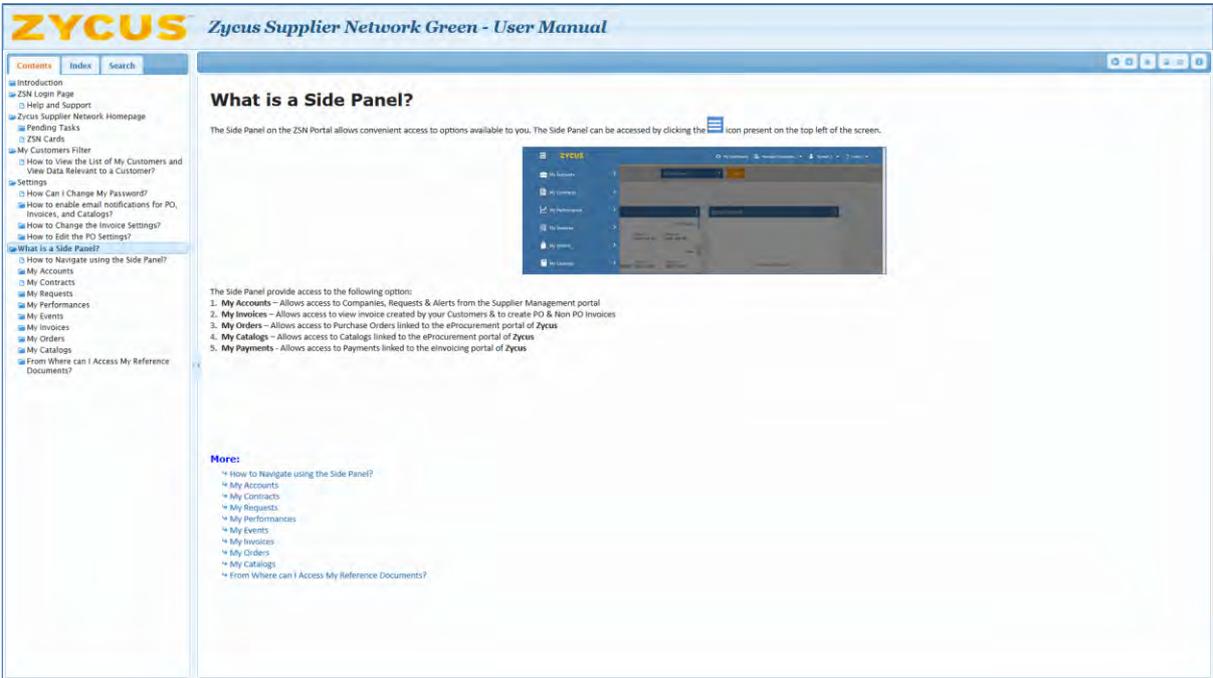
The screenshot displays the Zycus Supplier Network user interface. At the top, the ZYCUS logo is on the left, and navigation links for 'Rate Us', 'My Dashboard', 'Manage Companies', 'sudheer', and 'Help' are on the right. A vertical sidebar on the left contains icons for home, dashboard, calendar, list, folder, and search. The main content area is titled 'Help Videos' and is divided into two sections: 'New to ZSN' and 'Managing sourcing events'. Each video entry includes a thumbnail, a title, a duration, and a 'Play' button. The 'New to ZSN' section contains two videos: 'Supplier Registration Via Buyer Link' (4:48) and 'Supplier Registration Via ZSN' (3:19). The 'Managing sourcing events' section contains seven videos: 'Confirming Participation To A Sourcing Event' (4:30), 'Preparing And Submitting Responses To A Sourcing Event' (8:10), 'Supplier EForum' (2:25), 'Negotiation During Analysis' (4:31), 'Auction Bidding' (4:00), 'Bid Reconciliation' (1:39), and 'Quick Source - Supplier Responding To An Event'. A red rectangular box highlights a sidebar menu on the right side of the page, which lists the following items: 'New To ZSN', 'Managing Sourcing Events', 'Accessing Contracts', 'Catalog Management', 'Viewing And Processing Purchase Orders', 'Creating And Tracking Invoices And Credit Memos', 'Supplier Performance Management', and 'General Overview And Profile'. At the bottom left of the screenshot, there is a small text note: 'Transferring data from zsn-tp.zycus.com...'

3.1.1.3 ZSN Online Help

1. To access ZSN online help, go to **Help > Self Training Material > Online Help** as shown in the image below:



2. You will land on the following page. This page is a web version of the ZSN manual which will allow you to search for your queries about ZSN.



3.2 Pending Tasks

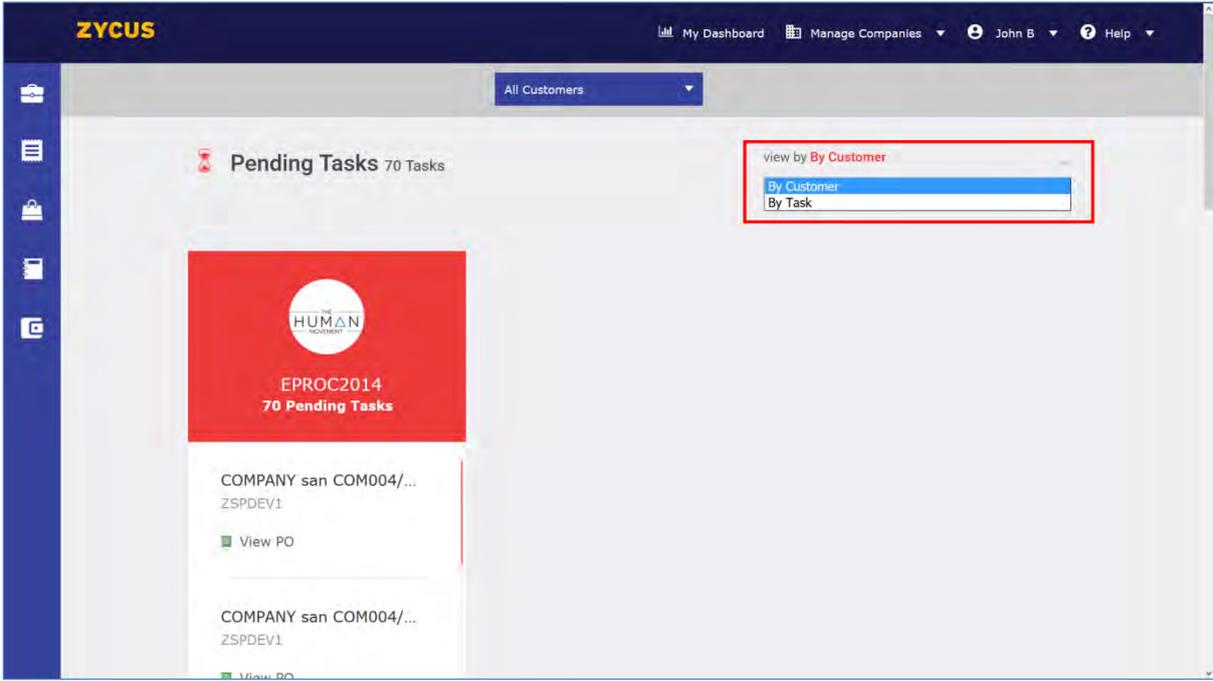
1. The top row (*highlighted*) is the Pending Tasks section.
2. This section will list all the pending tasks which require you to take actions on them.

The screenshot shows the Zycus Supplier Network dashboard. At the top, there is a navigation bar with 'ZYCUS' on the left, 'My Dashboard', 'Manage Companies', 'Suresh', and 'Help' on the right. Below the navigation bar is a dropdown menu for 'All Customers'. The main content area is titled 'Pending Tasks 332 tasks' and is viewed 'By Task'. It features three columns: 'INCOMPLETE TASKS' (9 tasks), 'INVOICES' (112 invoices), and 'PURCHASE ORDERS' (211 Purchase Orders). Each column has a 'Pending Completion', 'PENDING SUBMISSION', or 'PENDING CONFIRMATION' section with specific tasks and 'View PO' or 'View Invoice' buttons. Below this, there are two tables: 'INVOICES' and 'PURCHASE ORDERS'. The 'INVOICES' table shows three records with columns for Document Type, Customer, Due On, and Amount. The 'PURCHASE ORDERS' table shows three records with columns for PO Type, Customer, Released on, and Amount.

Document Type	Customer	Due On	Amount
Inv_18_5_11_cXML - Delivered	ZSPDEV1	30/10/2015	CAD 538.86
Inv_6_5_1_cXML - Submitted	ZSPDEV1	30/10/2015	USD 1,661.04
Inv_remit_cXML_2 - Submitted	ZSPDEV1	30/10/2015	USD 1,661.03

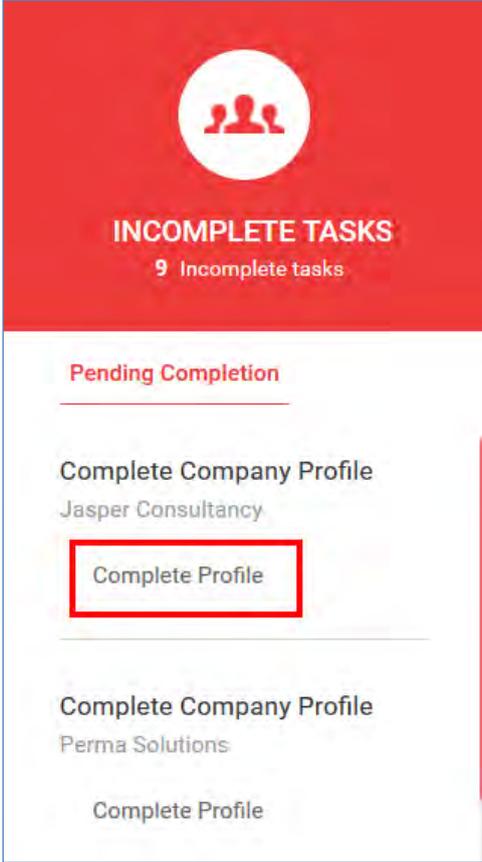
PO Type	Customer	Released on	Amount
ZSPDEV1 PO/995 - Unconfirmed	ZSPDEV1	30/11/2016	USD 1,417.65
ZSPDEV1 PO/994 - Unconfirmed	ZSPDEV1	30/11/2016	USD 197.30
ZSPDEV1 PO/961 - Partially Invoiced	ZSPDEV1	29/11/2016	USD 403.79

**Note:** You can view the pending tasks either **By Task** name or **By Customer** as highlighted in the image below:



### 3.2.2 Pending Tasks – Complete Profile

- 1. For example, to create and fill your company profile, click **Complete Profile**.



- 2. You will be navigated to the following page:

**Company Registration Form**

\* Indicates required field

**Company Information**

\* Company

\* Address1

Address2

Address3

\* PO Box Number

\* Country

\* State

\* City

\* Zip / Postal Code

\* Business Phone

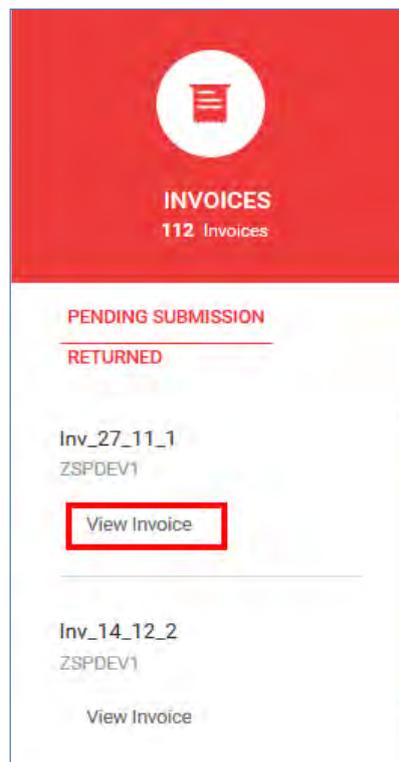
Business Fax

[Create](#) [Back](#)

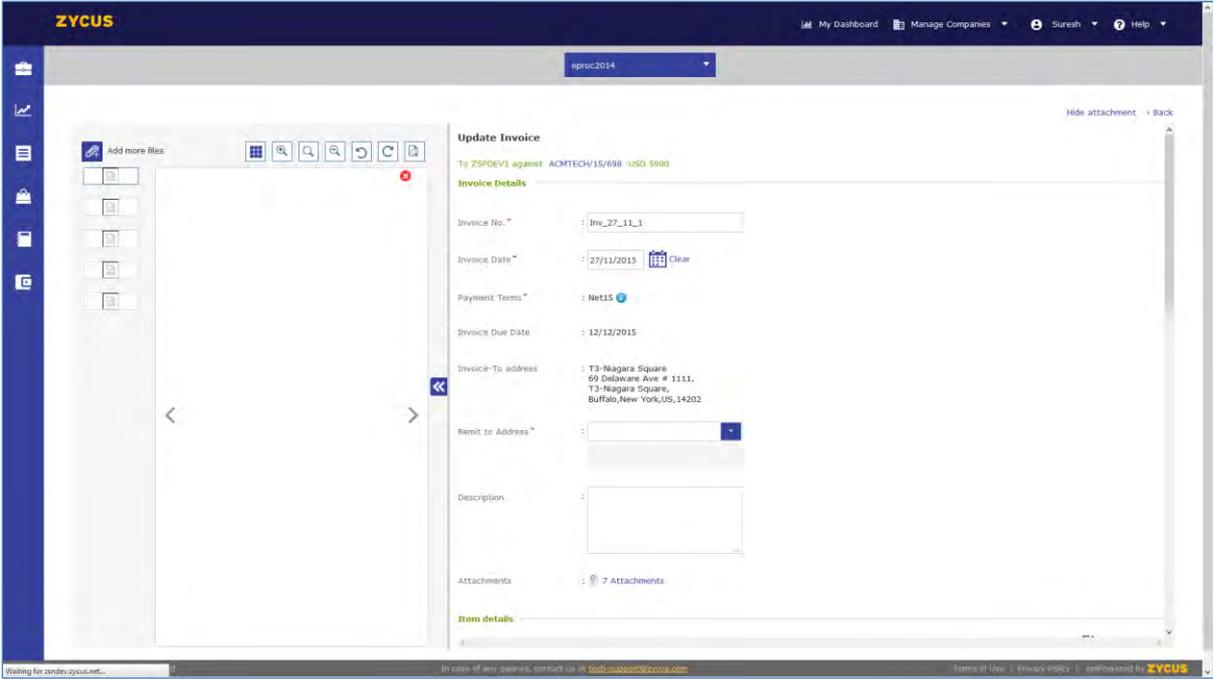
3. Fill in the information for your company and click **Create**.

### 3.2.3 Pending Tasks – Invoices

1. For invoices, you will view invoices with status such as **Pending Submission** or **Returned**.
2. For **Invoice** with status as **Pending Submission**, click **View Invoice**.



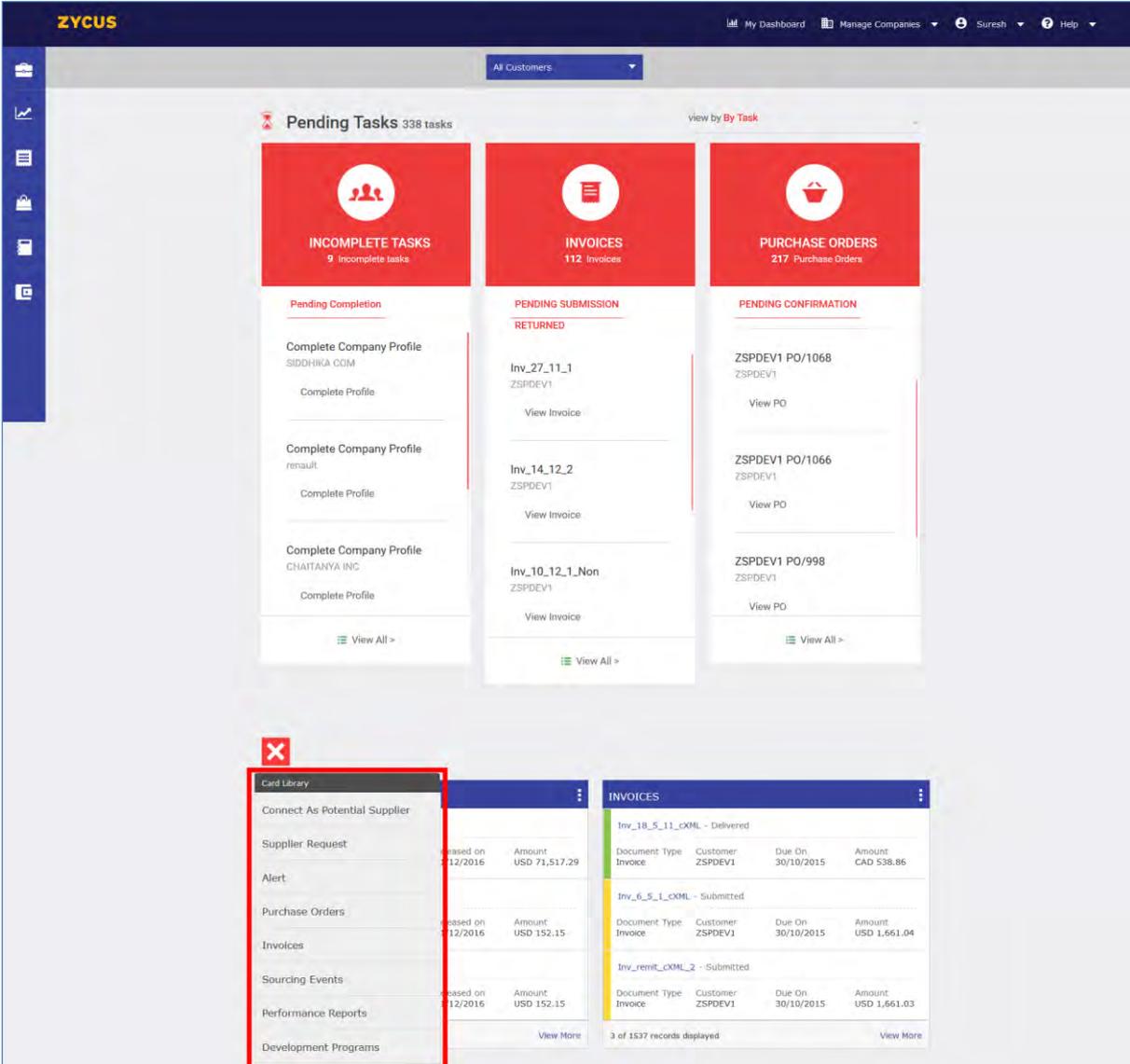
3. You will be navigated to the **Update Invoice** page:



4. Fill in the invoice details and submit the invoice.

### 3.3 ZSN Cards

1. Click on the  icon to view the card library.



The screenshot displays the Zycus Supplier Network dashboard. At the top, there is a navigation bar with the ZYCUS logo, user name 'Suresh', and options for 'My Dashboard', 'Manage Companies', and 'Help'. Below the navigation bar, a dropdown menu shows 'All Customers'. The main content area is titled 'Pending Tasks 338 tasks' and is viewed 'By Task'. It features three red cards: 'INCOMPLETE TASKS' (9 incomplete tasks), 'INVOICES' (112 Invoices), and 'PURCHASE ORDERS' (217 Purchase Orders). Each card has a 'Pending Completion' section with a list of tasks and a 'View All >' link.

A 'Card Library' modal is open, showing a list of cards that can be added to the dashboard. The cards are:

- Connect As Potential Supplier
- Supplier Request
- Alert
- Purchase Orders
- Invoices
- Sourcing Events
- Performance Reports
- Development Programs

The modal also shows a preview of the 'INVOICES' card, displaying a table of invoice records:

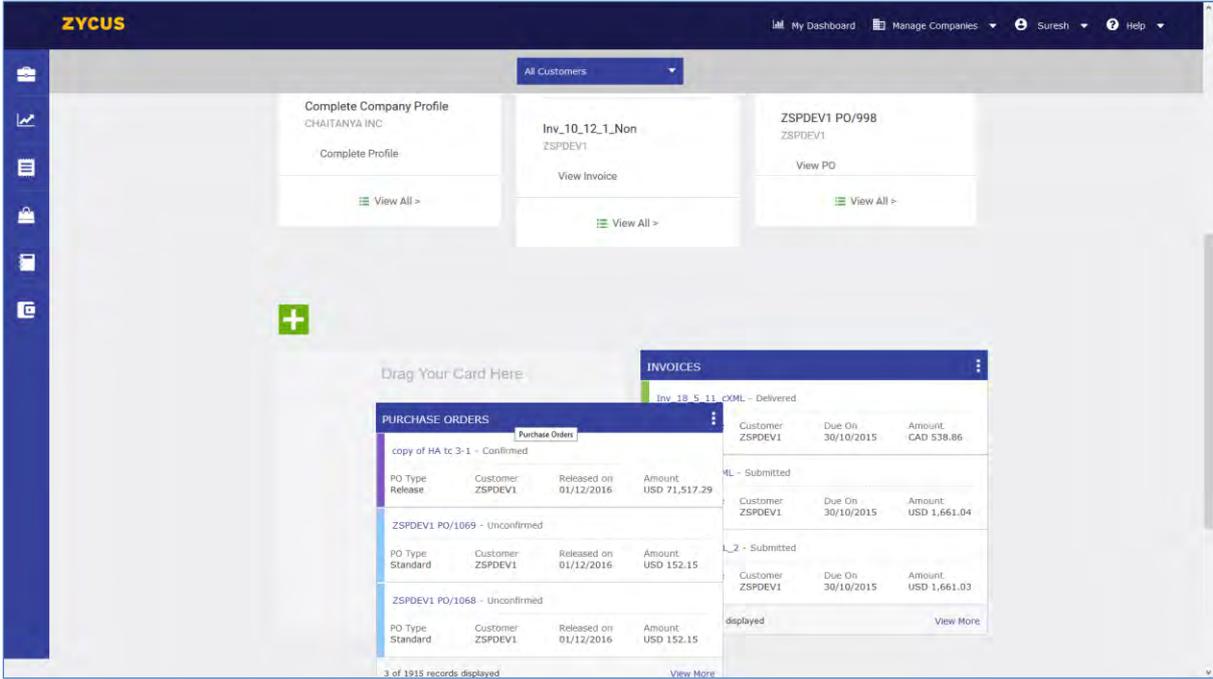
Document Type	Customer	Due On	Amount
Inv_18_5_11_cXML - Delivered	ZSPDEV1	30/10/2015	CAD 538.86
Inv_6_5_1_cXML - Submitted	ZSPDEV1	30/10/2015	USD 1,561.04
Inv_remit_cXML_2 - Submitted	ZSPDEV1	30/10/2015	Amount USD 1,561.03

At the bottom of the modal, it indicates '3 of 1537 records displayed' and a 'View More' link.

2. Select the cards from the list which you want to view on your homepage.

**NOTE:** The cards visible will depend upon the admin settings.

3. Once you select the cards, they will appear on your home page. You can resize, and arrange the cards on the homepage as per your convenience.
4. You can shuffle the cards on the homepage by dragging and dropping. You will get a message of **Drag Your Card Here** when you move the cards.



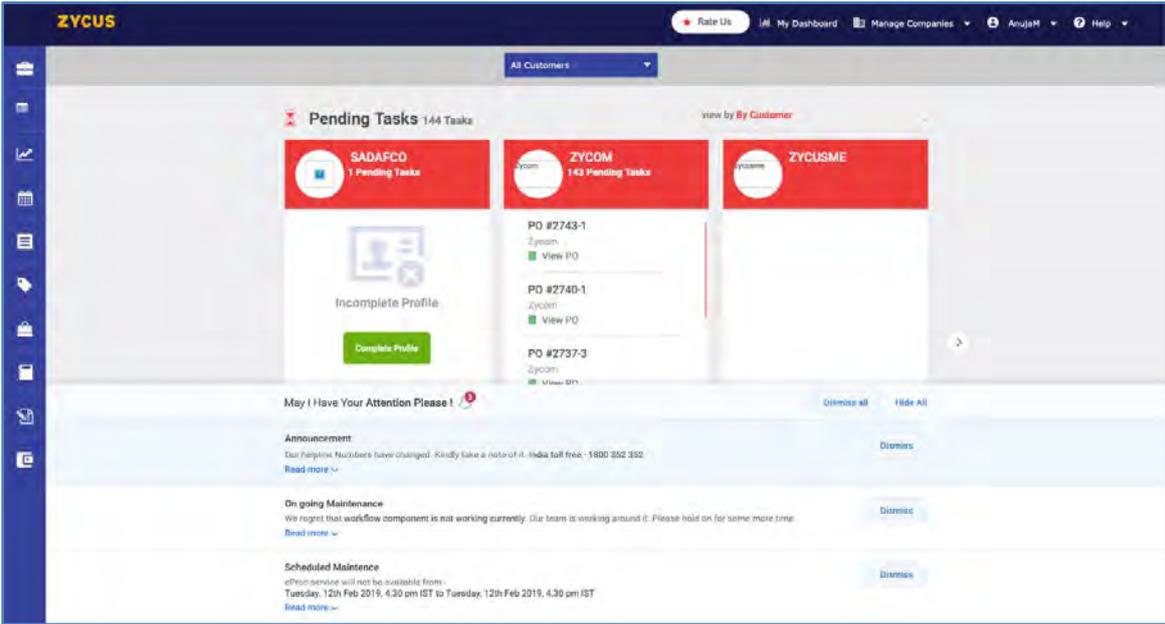
- You can resize the cards from the card's border and corner using the  and  arrow.
- You can also discard the cards by using the  button. Click **Discard**, the card will disappear from the screen.
- The cards will display few records on the screen. To view all the records, click on **View More** link available on the bottom right of a card.

PURCHASE ORDERS			
copy of HA tc 3-1 - Confirmed			
PO Type	Customer	Released on	Amount
Release	ZSPDEV1	01/12/2016	USD 71,517.29
ZSPDEV1 PO/1069 - Unconfirmed			
PO Type	Customer	Released on	Amount
Standard	ZSPDEV1	01/12/2016	USD 152.15
ZSPDEV1 PO/1068 - Unconfirmed			
PO Type	Customer	Released on	Amount
Standard	ZSPDEV1	01/12/2016	USD 152.15
3 of 1915 records displayed			<a href="#">View More</a>

### 3.4 CNS Notification for Suppliers

There will be an in-app notification to alert suppliers about product related developments by Zycus. All the new notifications will come on the top, the notification tray will be open if there are any new notifications, if the user clicks on Hide all, the notifications will be hidden, even if the user is directed to the home page from some other page.

If there is any new notification, when the session is active then only the notification tray will open, and the unread count will increase. The count will be decreased if the user clicks on a notification, and the notification will be marked as a read notification.



## Chapter 4: My Customers Filter

Zycus Supplier Network portal provides you the My Customers filter to provide a quick filter to display Customer Data. All Customers mapped to your account are displayed in the Drop-Down list.

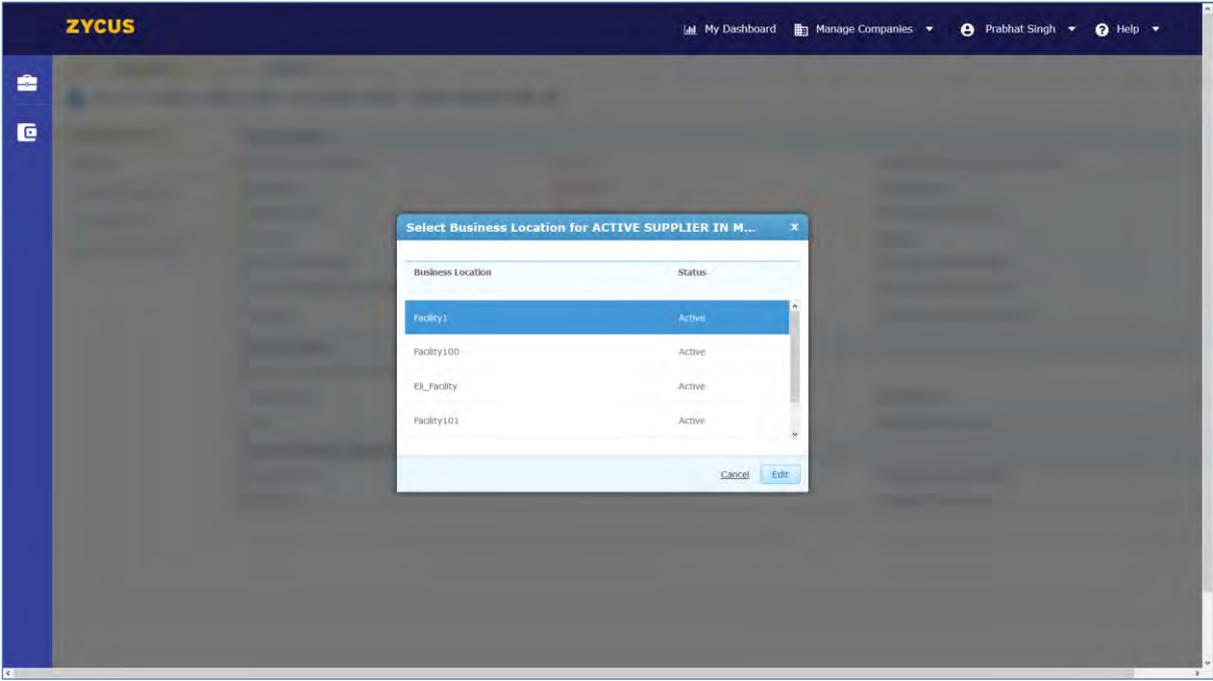
### 4.1 How to View the List of My Customers and View Data Relevant to a Customer?

**My Customers** filter is present on the **Home** page of the Zycus Supplier Network portal.

Click on **Manage Companies** on the dashboard and select **My Customers**.

Sr No.	My Companies	My Customers	Actions
31	STAPLES CONTRACT & COMMERCIAL	eproc2014	
32	STAPLES CONTRACT & COMMERCIAL	AMKOR	
33	SUPPLIER_RETURN	eproc2014	
34	SUPPLIER_RETURN	AMKOR	
35	SUP_EPROC1	eproc2014	
36	SUP_EPROC1	AMKOR	
37	SUP_DEVTEST	eproc2014	
38	SUP_DEVTEST	AMKOR	
39	PRAGATI	eproc2014	
40	PRAGATI	AMKOR	

1. Click on the drop-down box of My Companies or My Customers
2. Select the required Company or Customer
3. Click **Go**. All the companies relevant to you are displayed.
4. You can edit a company's information by clicking the  from the **Actions** column. Select a business unit you want to edit.

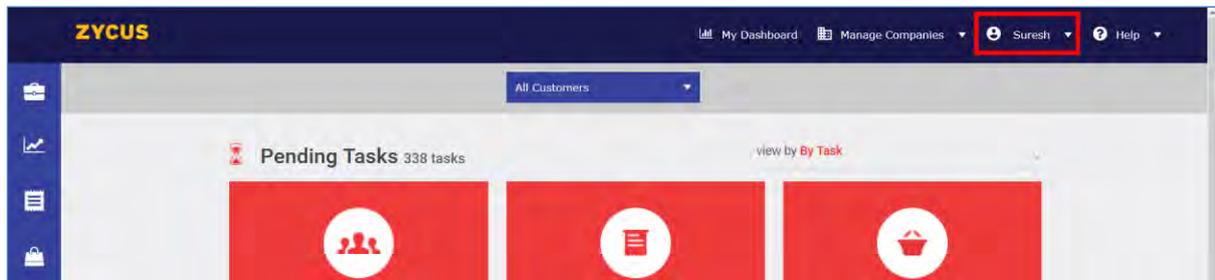


5. For next steps, refer **How to Edit a Supplier Company?**

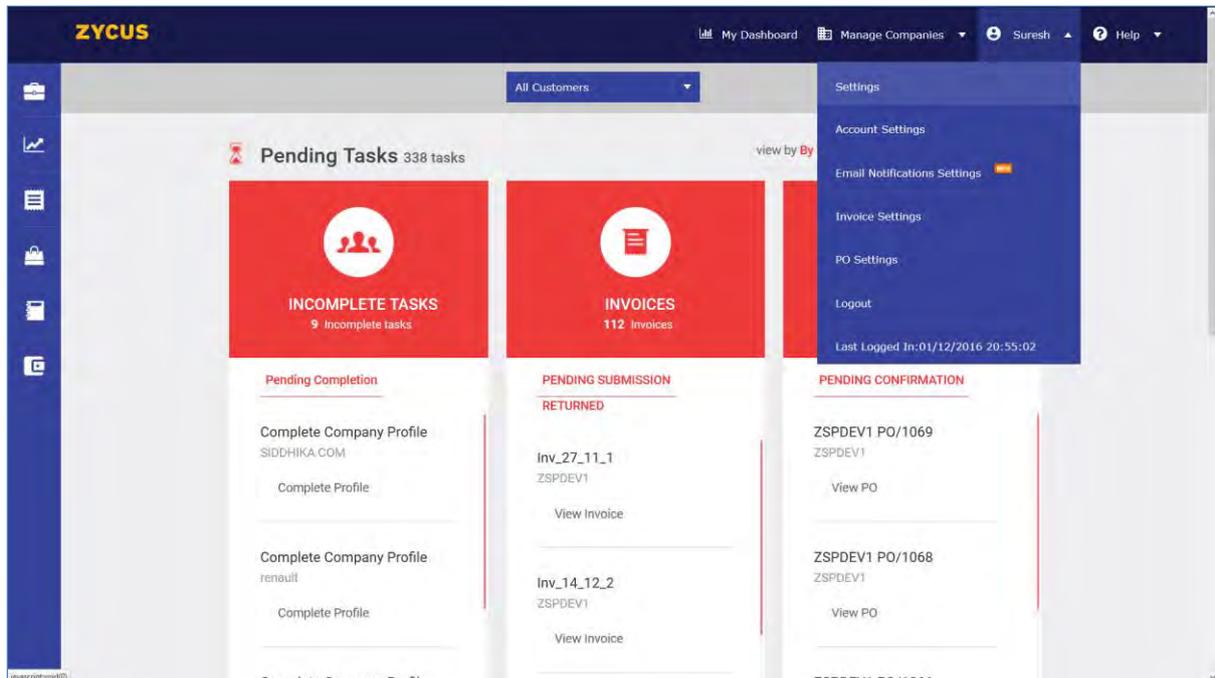
## Chapter 5: Settings

Zycus Supplier Network provides users the flexibility to manage their profile, set their preferences, change password along with managing settings for Invoices and Purchase Orders.

The **Settings** menu can be accessed by clicking on the Display Name of the User present on the top right corner as shown below:



Clicking **Settings** will provide the user access to the following **ZSN Settings**:

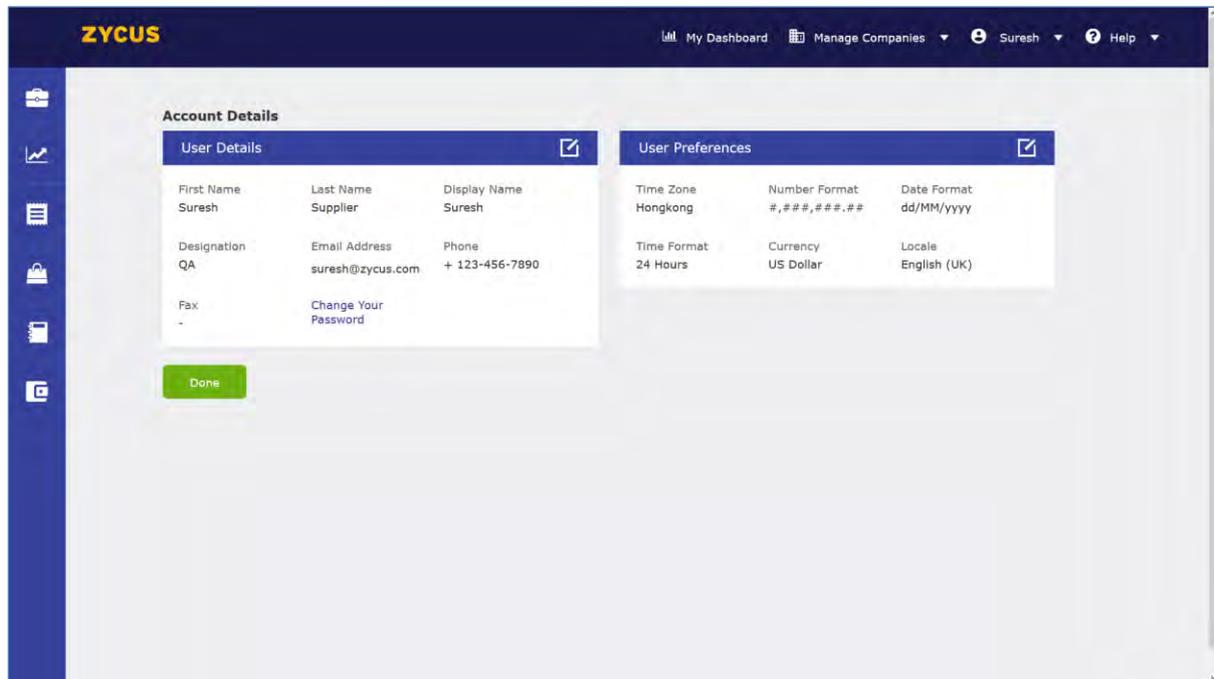


Name	Description
<b>Account Settings</b>	Allows you to update your User Details & Preferences
<b>Email Notification Settings</b>	Allows you to enable email notifications to receive updates on Catalog, PO, and Invoices
<b>Invoice Settings</b>	Provides access to settings related to Invoice Delivery
<b>PO Settings</b>	Provides access to settings related to Purchase Order Delivery

## 5.1 How to Update My Account Information?

### To edit User Details and Preferences:

1. Navigate to the following location: Your Display Name > **Settings** > **Account Settings**.



2. Click the  icon corresponding to the required section: **User Details** or **User Preferences**.

3. Under the **User Details** section, you can modify the following details:

- First Name
- Last Name
- Display Name
- Job Title
- Email Address
- Phone
- Fax

4. Under the **User Preferences** section, you can modify the following details:

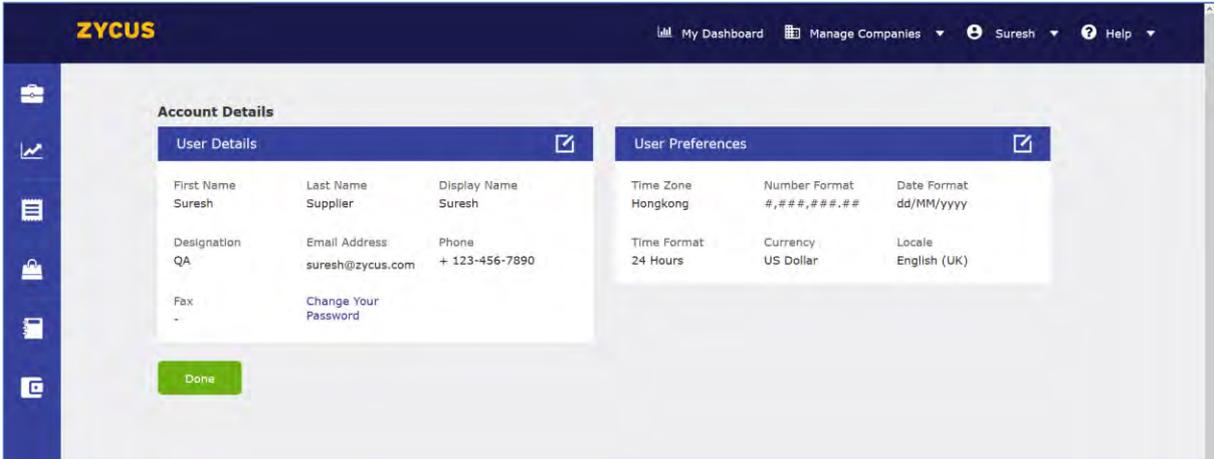
- Time Zone
- Number Format
- Date Format
- Time Format
- Currency
- Language

5. Click **Save** corresponding to the section in which the changes are made.

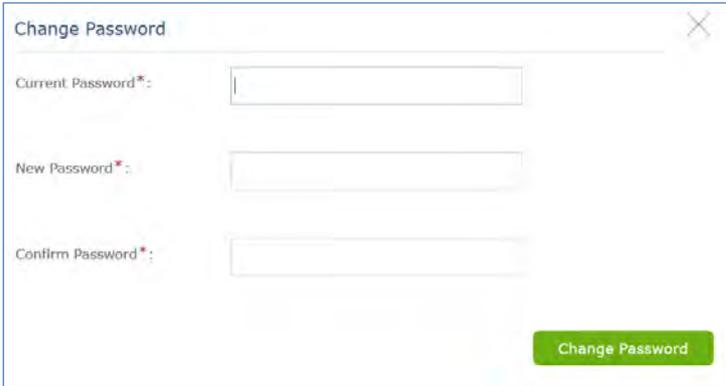
### 5.1.1 How Can I Change My Password?

**To edit User Details and Preferences:**

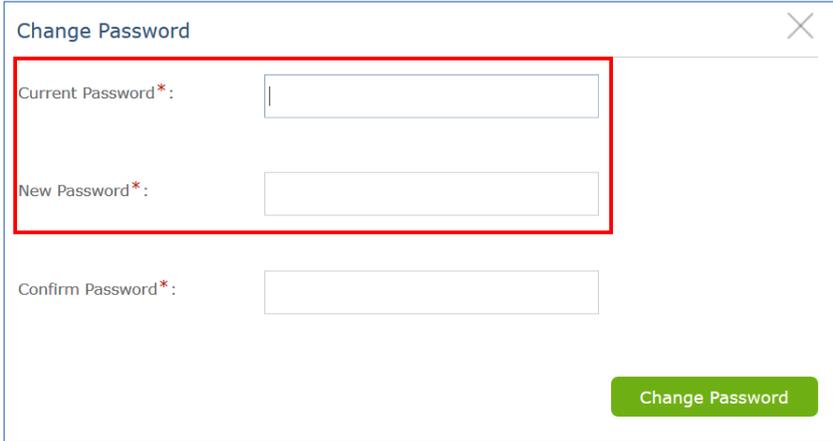
1. Navigate to the following location: Display Name > **Settings** > **Account Settings**.



2. Click on the **Change Your Password** link.



3. Enter the **Current Password** along with the **New Password**.



4. Reenter the New Password in the **Confirm Password** text box.

The image shows a 'Change Password' dialog box with three input fields: 'Current Password\*', 'New Password\*', and 'Confirm Password\*'. The 'Confirm Password\*' field is highlighted with a red rectangular border. A green 'Change Password' button is located at the bottom right of the dialog box.

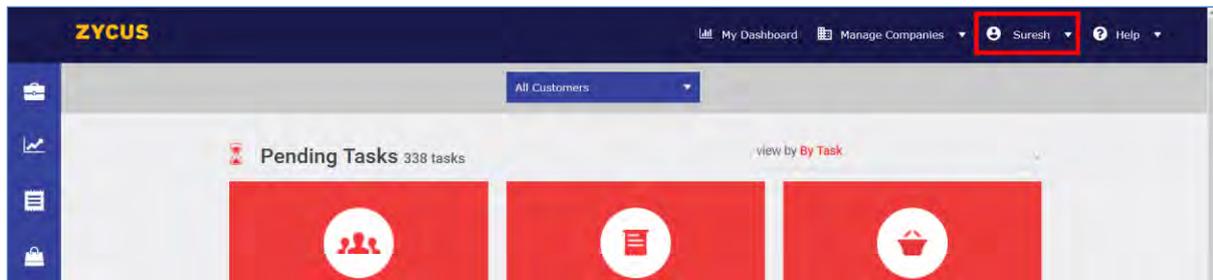
5. Click **Change Password** to complete the password change procedure.

## 5.2 How to enable email notifications for PO, Invoices, and Catalogs?

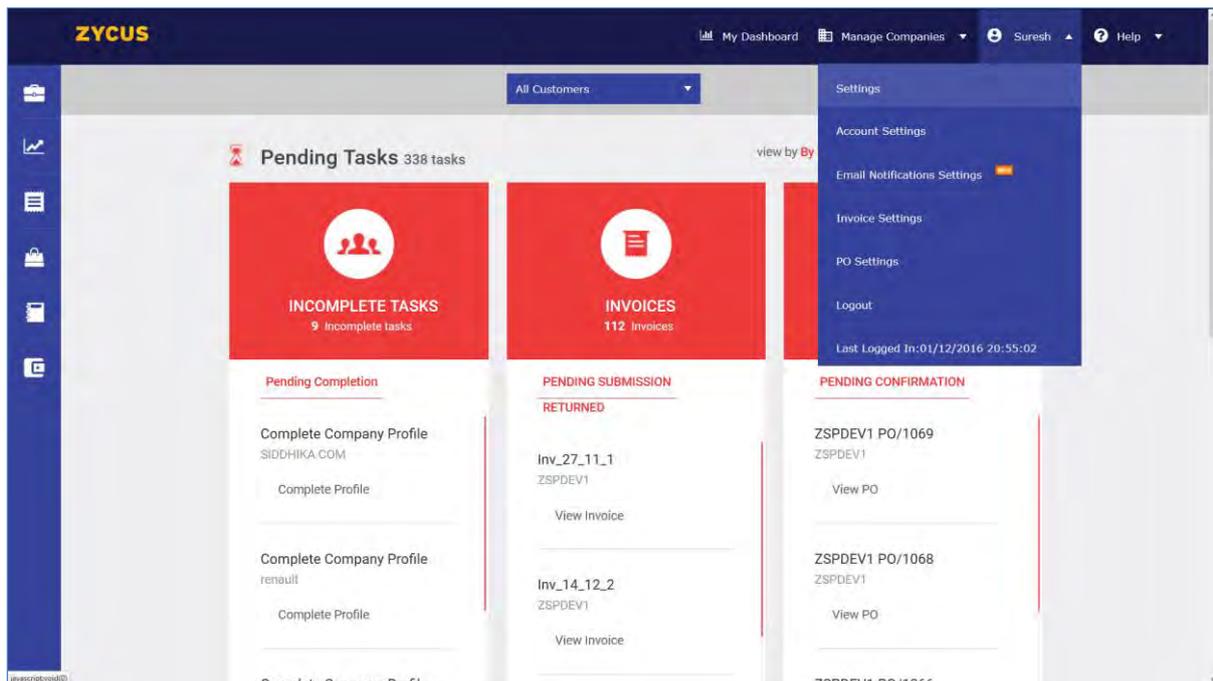
The **Email Notification Settings** allow you to configure setting so that you will receive notifications about PO, Invoice, and Catalogs.

### 5.2.1 Editing Email Notifications Settings

1. Click on the **Display Name** as highlighted in the image below:



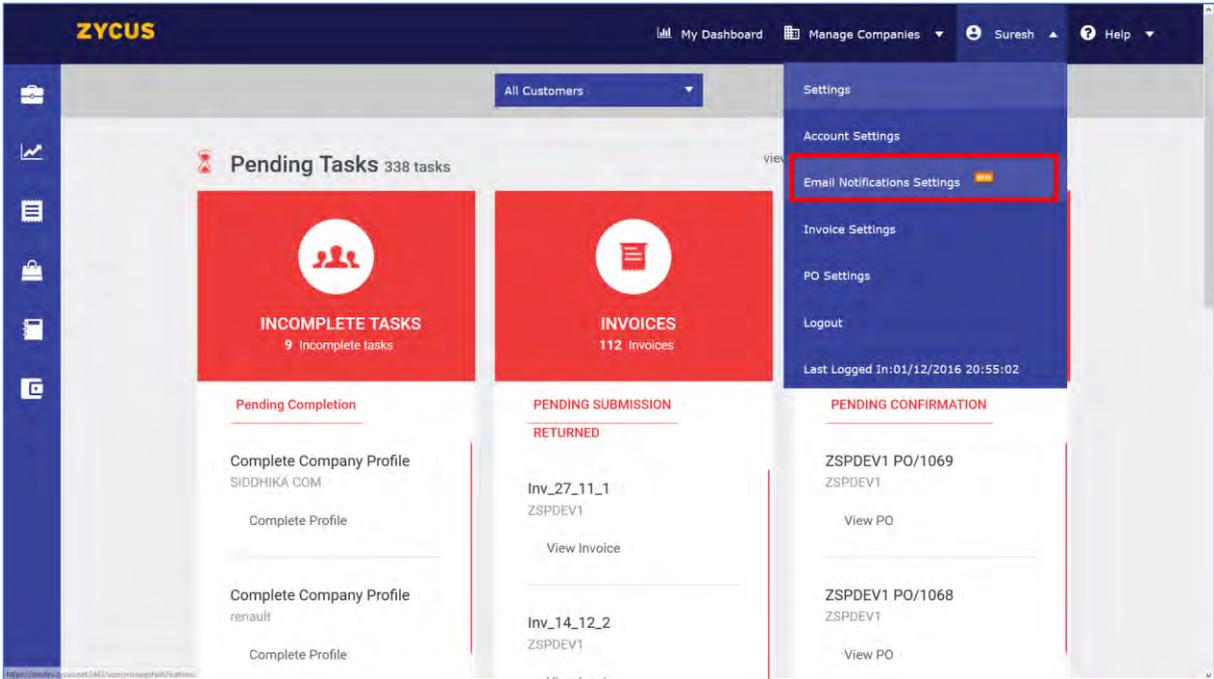
2. A menu will collapse. From the menu, click **Settings**.



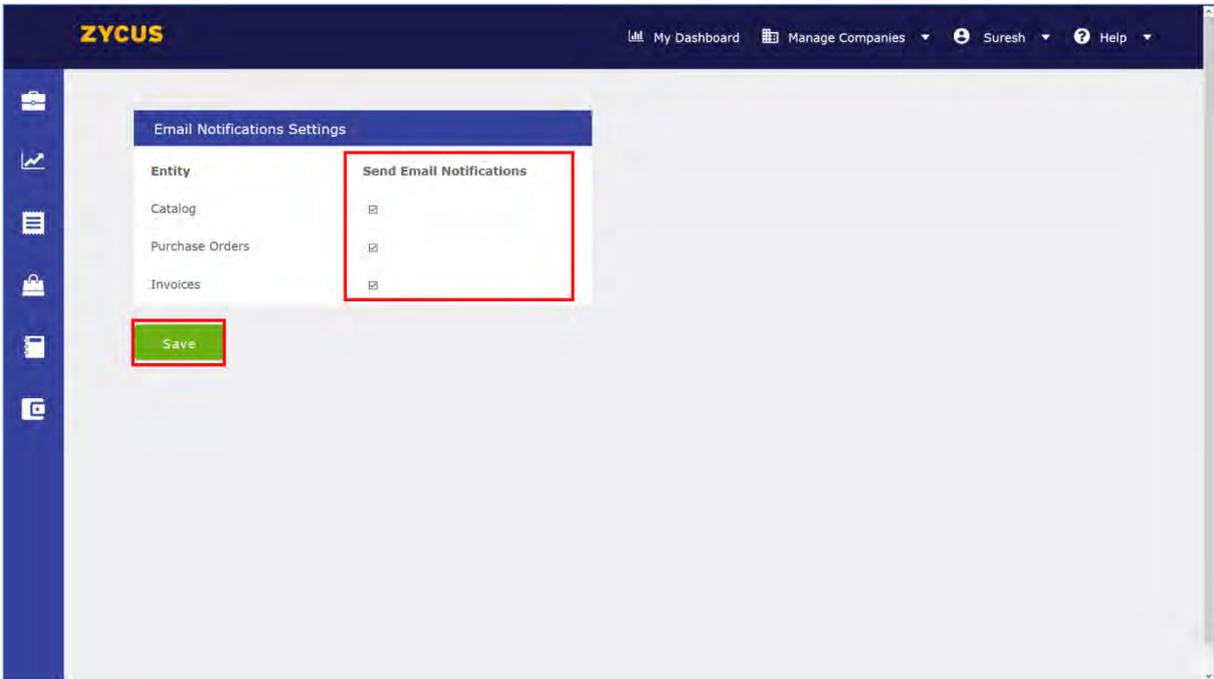
3. Settings section will expand and show the following options:

- Account Settings
- Email Notifications Settings
- Invoice Settings
- PO settings

4. Click **Email Notifications Settings**.



5. You will be navigated to the following page:



- 6. Enable settings as per your requirements. If you want to receive notifications for **Catalog**, **Invoices** and **POs**, check the boxes against each entities.
- 7. Click **Save** once you finish enabling the notifications settings.

### 5.2.2 Types of Status Change and Notification Received on Email

You will receive status notification for all below status changes and notifications on email:

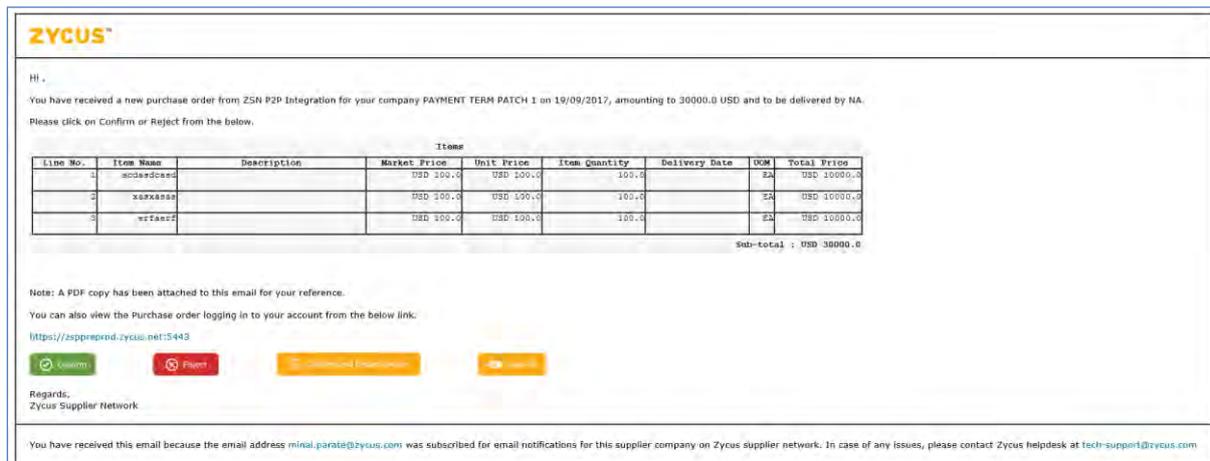
- New PO Received
- PO confirmed
- PO rejected
- New Invoice Creation
- Invoice Submitted
- Invoice in approval
- Invoice Rejected
- New Catalog Submitted
- Catalog Approved
- Catalog Rejected
- Catalog Published

**Note:** You will be able to take action from these emails without logging in to ZSN; however you will be restricted to go to any other page on ZSN.

### 5.2.3 Taking actions on the emails

1. Once the email notifications have been enabled, you will start receiving notifications on the registered email address.
2. For example, while receiving a new purchase order, you will be notified via email as shown below:

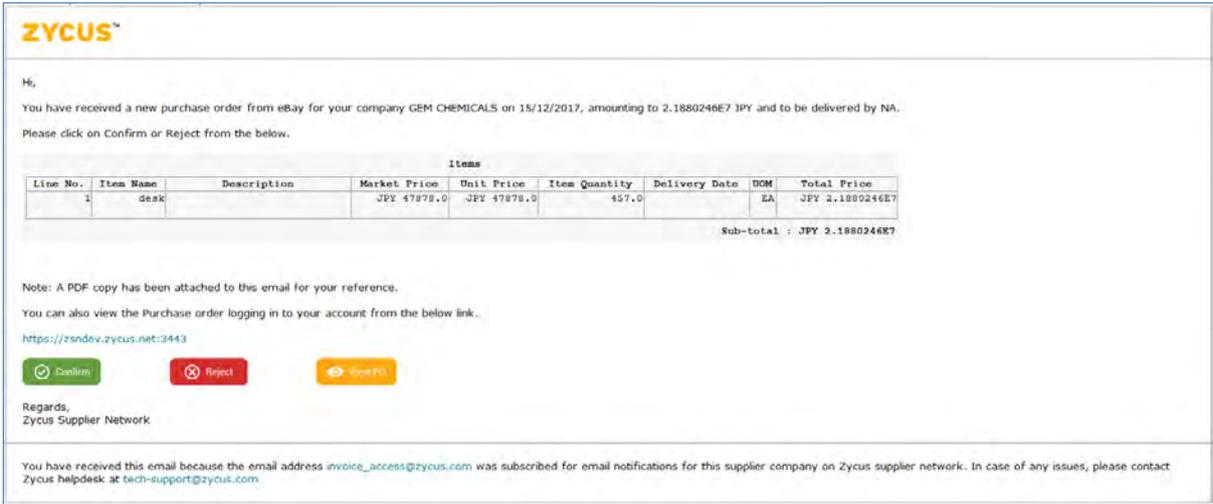
If the user has access to Zycus eInvoice, the email will have a single button to **Confirm and Create PO** apart from **Confirm**, **Reject**, and **View PO** as shown below:



**Note:** Purchase Orders created for suppliers that are not registered on ZSN, will NOT be auto-confirmed by the system. Clicking Confirm, Reject, Confirm, or Create Receipt will take the supplier

to the registration page on ZSN. Supplier will have to register on ZSN to take action on the PO. Post registration, they can take an action from the e-mail itself, or from the Supplier Network.

If the user doesn't have access to Zycus eInvoice, the email will only have **Confirm** button as shown below:

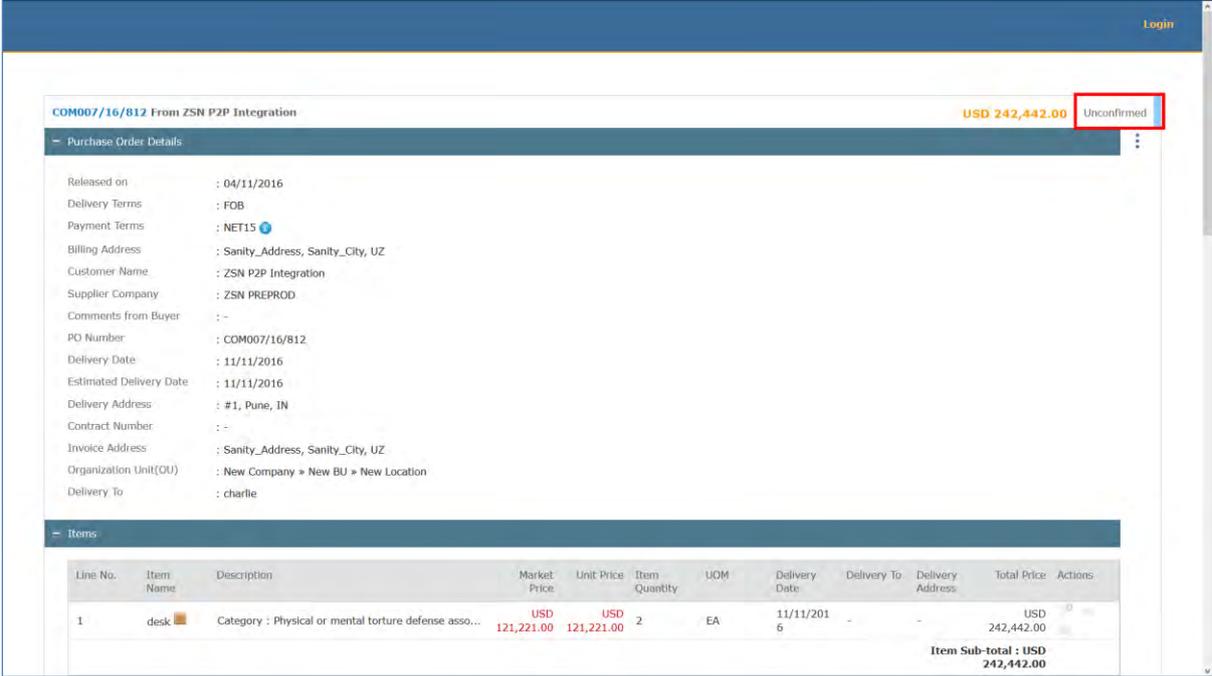


**NOTE:** The emails received will contain the details of the PO. The PDF attachment of the PO may or may not be present in the email depending on the settings selected by the buyer organisation.

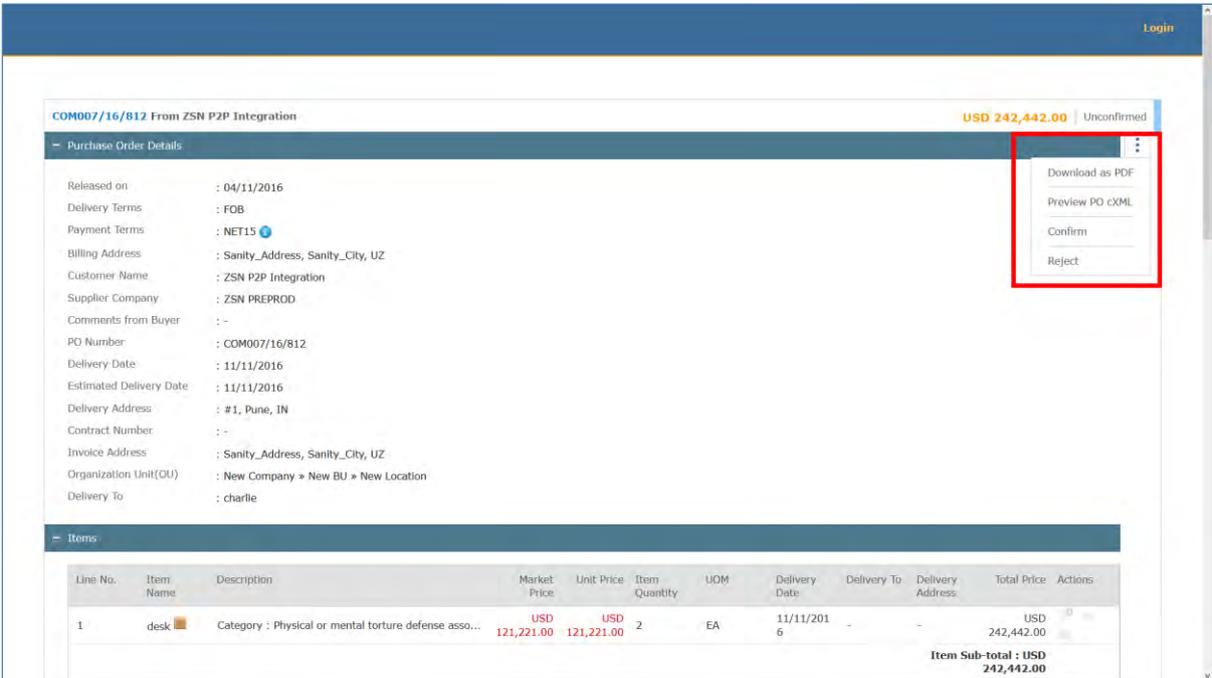
- 3. The emails will have actionable buttons. You can choose to **Confirm, Reject, Confirm PO, and Create Invoice** or **View PO** from the email.
- 4. If you are a registered user, you can perform these actions without logging in to the ZSN tool. However, you won't be able to navigate anywhere else in the tool.

### 5.2.3.1 View PO

Click **View PO**, you will be redirected to the PO on ZSN as shown below:

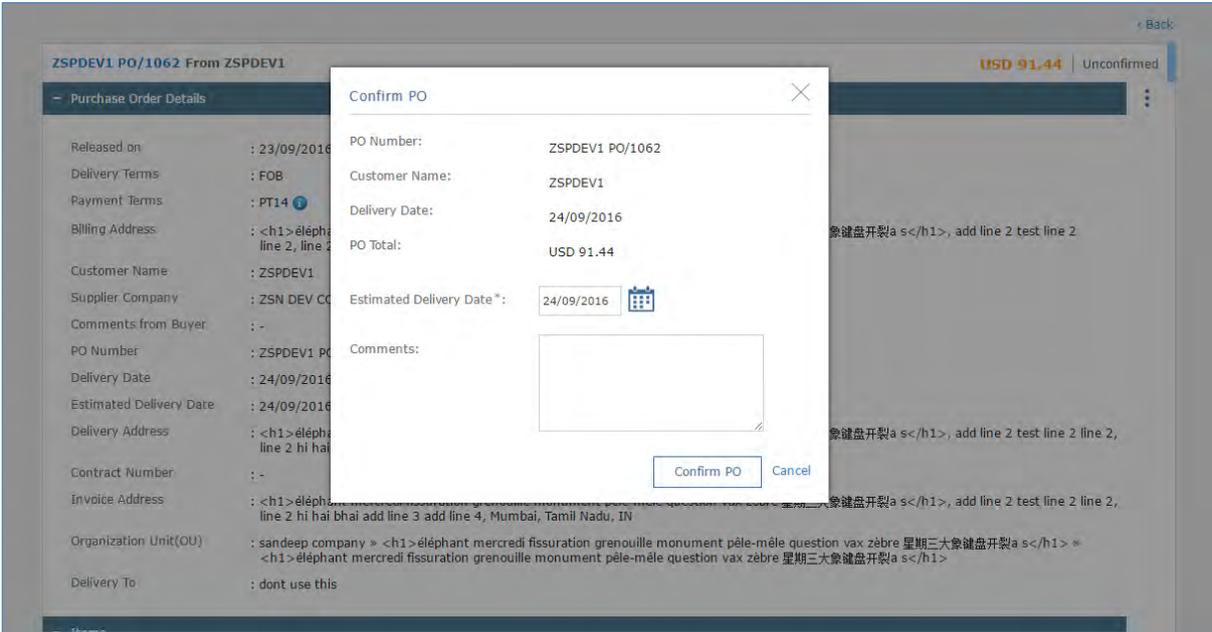


1. The status of the PO will be unconfirmed (*highlighted in the image above*).
2. You can take actions (**Download as PDF, Preview PO cXML, Confirm, Reject**) on this PO by clicking the actions menu.

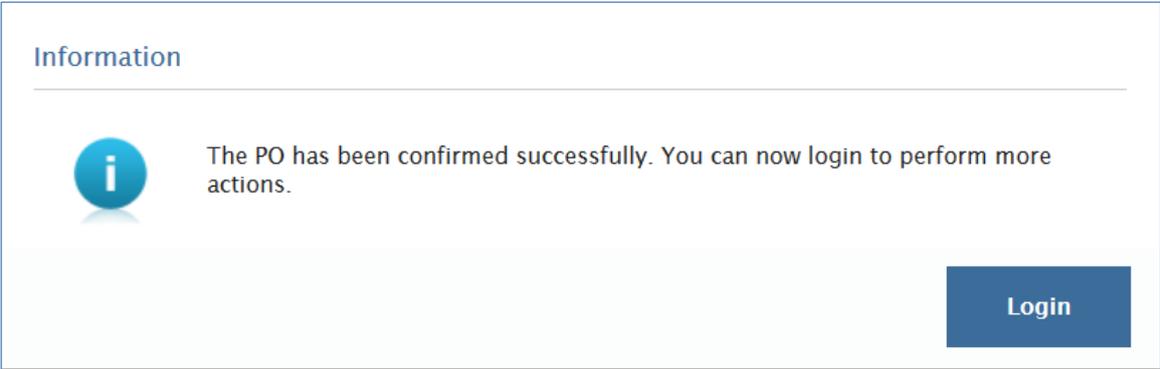


### 5.2.3.2 Confirm PO

1. Click **Confirm**, you will be redirected to the **Confirm PO** popup on ZSN as shown below:

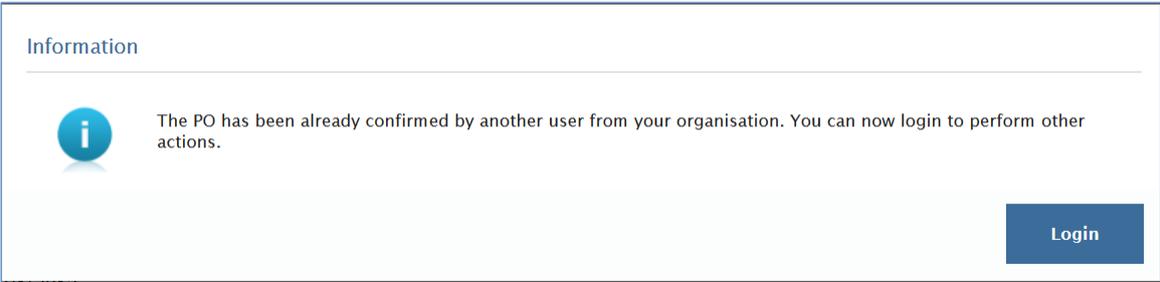


- 2. Enter the **Estimated Delivery Date** and **Comments** before clicking **Confirm PO**.
- 3. You will be able to confirm the PO without logging on ZSN.
- 4. Once confirmed, you will get a notification about PO confirmation as shown below.

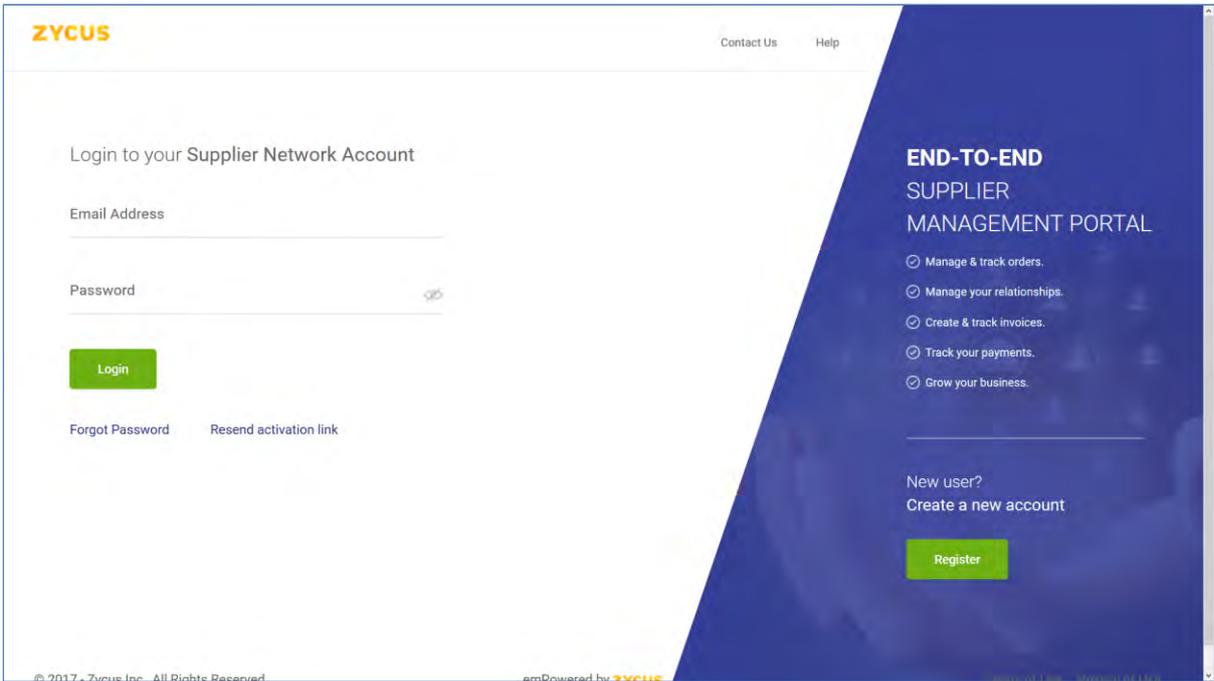


**NOTE:** To take more actions, click **Login**.

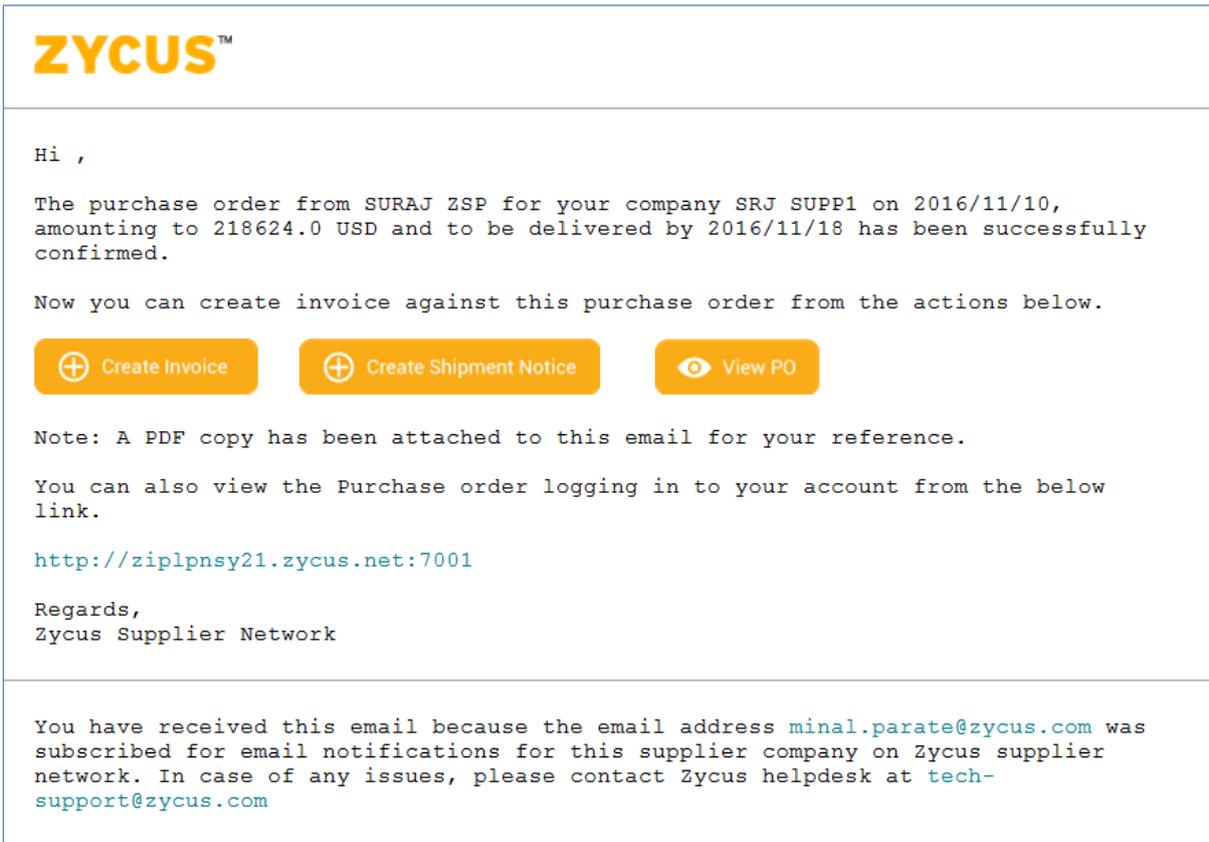
- 5. If you confirm a PO which is already confirmed, then you will get the following popup:



**Note:** On clicking Login, you will be redirected to the following page:



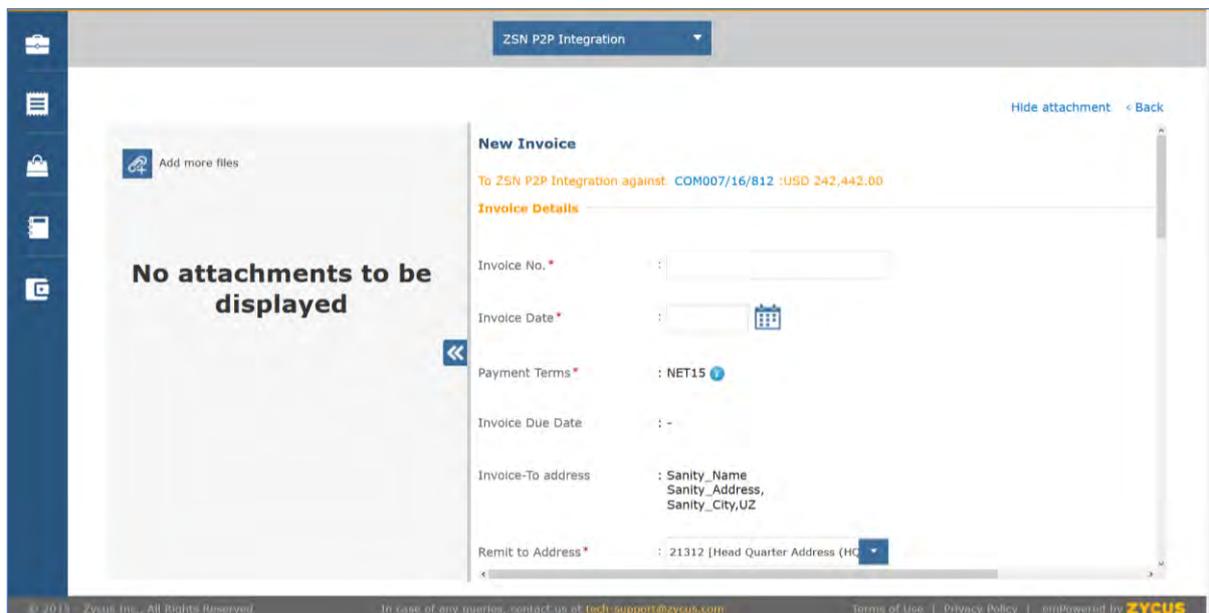
- 6. The confirmation of PO will also be sent as a mail notification to the supplier.



7. The confirmation email will have actionable buttons to **Create Invoice**, **Create Shipment Invoice** and **View PO**.

### 5.2.3.3 Create Invoice

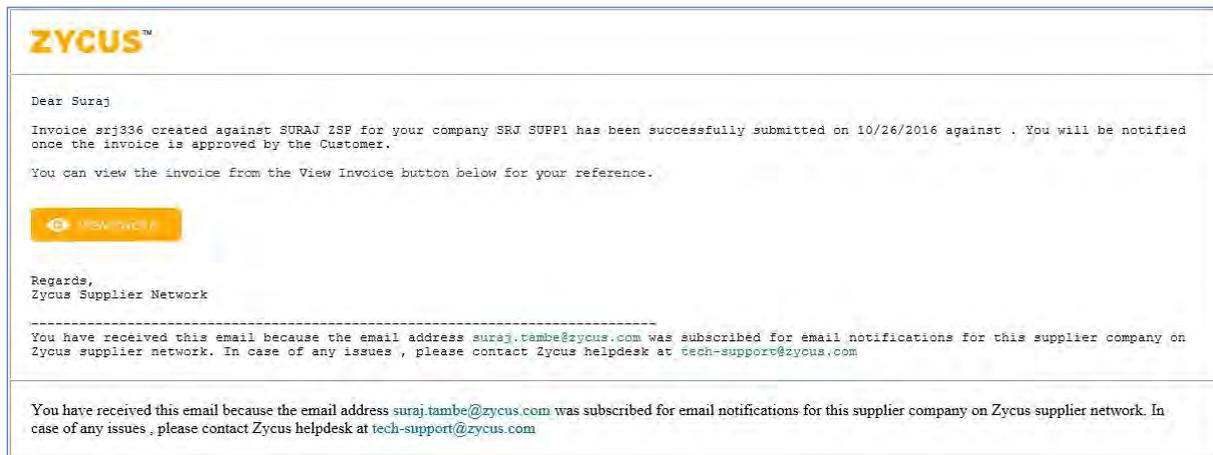
1. Click **Create Invoice** from the email, you will be navigated to the following page:



**Note:** You will be able to create an invoice without logging on ZSN.

**Note:** In case you don't submit the invoice, then it will not be saved as a draft.

2. A side by side panel will open from where you can create an invoice to a confirmed PO.
3. You will be able to add attachments for this invoice only from your computer. You won't be able to attach documents from the **Uploads** section.
4. Once you submit the invoice, you will get the following popup: **“You have now successfully submitted the invoice against the Purchase order. You can now login to perform more actions.”**
5. You will receive status updates on your submitted invoice via emails. For example, you will be notified on successful creation of Invoice as shown below:



**Note:** In case if you try to create Invoice against a PO which is already invoiced, then you will get following message: **“The PO has been already fully invoiced by another user from your organisation. You can now login to perform other actions”**.

**Note:** In case if you don't have the necessary rights to create invoice then you will be redirected to the **Access denied** page.

#### 5.2.3.4 Confirm PO and Create Invoice

Suppliers will be able to Confirm Purchase Order and Create Invoice directly from the “Purchase Order Received” e-mail notification.

The e-mail notification will have a single button “Confirm and Create Invoice”. When the supplier clicks the button, the Purchase Order will get confirmed and he will get redirected to the invoice creation page.

Refer section [Create Invoice](#) for reference.

### 5.2.3.5 Create Shipment Invoice

Once your PO is confirmed, you will receive an email confirmation. From that email, you will have an option of creating a shipment invoice against that PO.

1. From the email body, click **Create Shipment Invoice**.



---

Hi ,

The purchase order from SURAJ ZSP for your company SRJ SUPP1 on 2016/11/10, amounting to 218624.0 USD and to be delivered by 2016/11/18 has been successfully confirmed.

Now you can create invoice against this purchase order from the actions below.

Note: A PDF copy has been attached to this email for your reference.

You can also view the Purchase order logging in to your account from the below link.

<http://ziplpnsy21.zycus.net:7001>

Regards,  
Zycus Supplier Network

---

You have received this email because the email address [minal.parate@zycus.com](mailto:minal.parate@zycus.com) was subscribed for email notifications for this supplier company on Zycus supplier network. In case of any issues, please contact Zycus helpdesk at [tech-support@zycus.com](mailto:tech-support@zycus.com)

- You will be navigated to the **New Shipping Notice** page:

**New Shipping Notice**

ZSPDEV1 copy of HA tc 3-1 To against : USD 48,884.00

Shipment Identified By\*: Shipper's Identifying Number (SIN)

Carrier\*:

Shipment No.\*:

Shipped Via\*: --Select--

Shipment Date\*: 01/12/2016 Clear

Service Level\*: --Select--

Expected Delivery Date\*:

Comments:

**Item details**

No.	Item No.	Item Name	Ordered Qty	UOM	Pending Qty	Shipped Qty
1	1	Release order	2222	CA	2222	

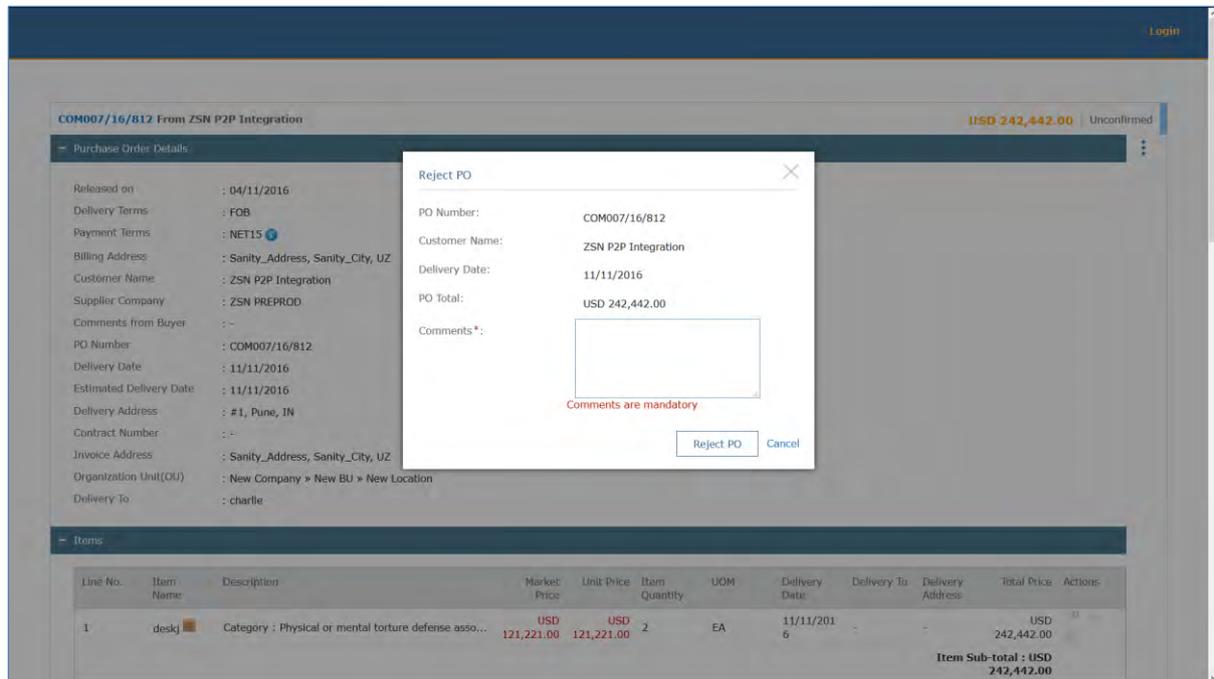
Submit

© 2016 - Zycus Inc., All Rights Reserved | In case of any queries, contact us at tech.support@zycus.com | Terms Of Use | Privacy Policy | emPowered by

- Fill in the shipping details and click **Submit**.
- You won't be able to navigate anywhere else in the tool. After clicking **Submit**, you will see the following message popup: **"You have now successfully submitted the shipment notice against the Purchase order. You can now login to perform more actions."**
- You can choose to login to ZSN or close the application.
- If the Shipment Notice is already created, then you will see the following message: **"Shipment notice is already created against this PO by another user from your organisation. You can now login to perform other actions."**
- If you don't have sufficient rights to create a **Shipment Notice**, then you will be shown the **Access Denied** page.

### 5.2.3.6 Reject PO

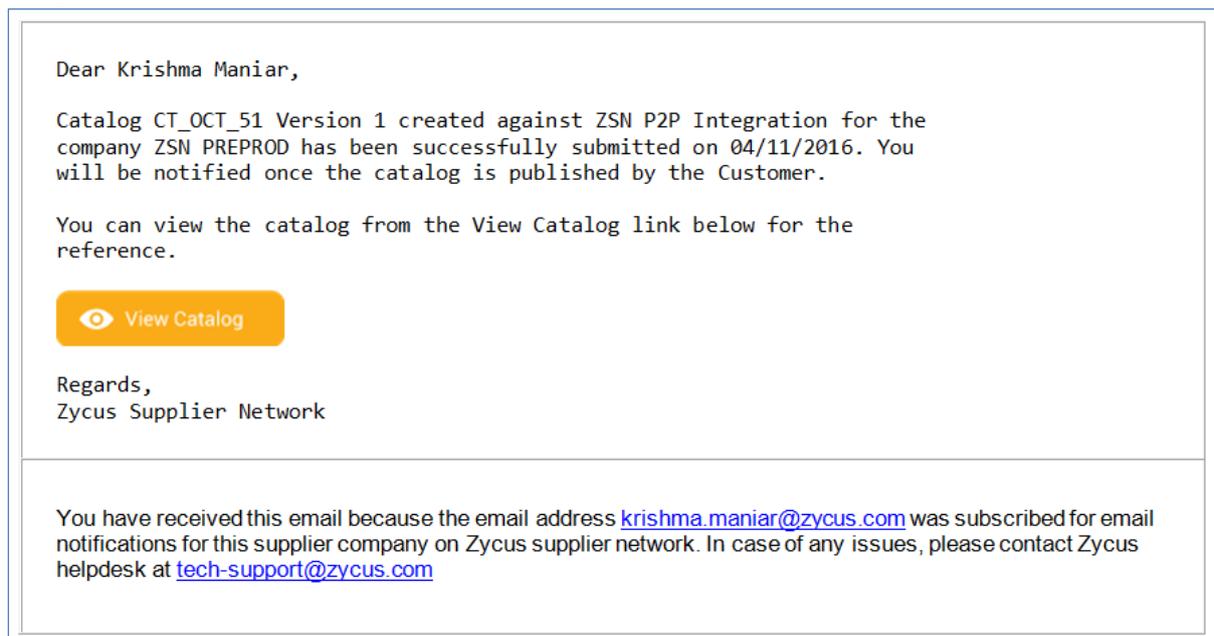
1. Click **Reject**, you will be redirected to the Reject PO popup on ZSN as shown below:



2. Enter the **Comments** before clicking **Reject PO**.

### 5.2.3.7 Viewing Catalog

1. If you have created and submitted a catalog on the ZSN portal, then you will be notified about your submission via email.



**Note:** You will be notified about every change in the catalog status via email.

### 5.2.3.8 Multi-Lingual Support for Emails

If the customer has configured email templates in various languages, supplier contacts will receive such actionable emails based on the preferred language set in their ZSN account.

## 5.3 How to Change the Invoice Settings?

The **Invoice Settings** page allows you to modify the Invoice Delivery Settings like Customer & Supplier Company along with Supplier, Sender & Buyer Credentials.

### 5.3.1 Editing Invoice Delivery Settings

**To edit Invoice Delivery Settings:**

1. Navigate to the following location: “Your Display Name” > **Settings** > **Invoice Settings**

The screenshot displays the 'Invoice Delivery Settings' page in the Zycus Supplier Network. The page is titled 'Invoice Delivery Settings' and contains the following fields and sections:

- Customer\***: ZSPDEV1
- Supplier Company\***: APPLE
- Delivery Method\***: cXML
- cXML Version\***: 1.2.021
- Supplier (From) Credentials**:
  - Domain\***: ZSNID
  - Identity\***: test1
- Sender Credentials**:
  - Domain\***: ZSNID
  - Identity\***: test1
  - Shared Secret\***: Njyx1o6e
- Buyer (To) Credentials**:
  - Domain\***: test1
  - Identity\***: test1
- Send cXML delivery failures via email to**:
  - Email\***: [Empty field]
  - Enter comma separated emails

At the bottom of the form, there are two buttons: **Submit** and **Back**.

- 2. Select the required **Customer** and **Supplier Company**.
- 3. Select the required Invoice Delivery option under the **Delivery Method** drop-down.
- 4. Perform the required steps based on the **Delivery Method** selected:

A. **cXML:**

Delivery Method*	:	cXML
cXML Version*	:	1.2.021
<b>Supplier (From) Credentials</b>		
Domain*	:	
Identity*	:	
<b>Sender Credentials</b>		
Domain*	:	
Identity*	:	
Shared Secret*	:	
<b>Buyer (To) Credentials</b>		
Domain*	:	EPROC
Identity*	:	GE
<b>Send cXML delivery failures via email to</b>		
Email*	:	
Enter comma separated emails		

- i. Select the cXML Version
- ii. Enter the required information in the **Supplier (From) Credentials**, **Sender Credentials** and **Buyer (To) Credentials**.
- iii. You can configure an email for sending cXML delivery failure messages under **Send cXML delivery failures via email to**, so the correct user will be notified in case of failures.

## B. EDI (Electronic Data Interchange):

The screenshot shows a web form titled "Invoice/Credit Memo Delivery Settings". It contains several dropdown menus and text input fields. The fields are: Customer (ZYCOM), Supplier Company (GALAXY CORP.), Delivery Method (EDI), Type (EDI via VAN), EDI Address Qualifier (ZZ), EDI Address (TESTEDI), and an email field (carl@galaxy.com) with a note "Send EDI Invoice failure notifications via email to" and "Enter comma separated emails". At the bottom, there are "Submit" and "Back" buttons.

- i. Select the method used for transmitting EDI messages under the **Type** drop-down.

**Note:** Zycus currently supports EDI via VAN (Value Added Network)

- ii. Select the **EDI Address Qualifier** from the drop-down list available.

**Note:** EDI Address Qualifier is a 2-character code which represents the type of EDI Address. Zycus currently supports the ANSI ASC X12 EDI Standard, version 4010

- iii. Enter the **EDI Address** for sending the Invoice.

**Note:** The EDI option is a Value Added Service and suppliers can only select it if their customer has enabled it. Otherwise it will be Disabled (greyed out).

- iv. You can configure an email for sending EDI Invoice failure messages under the **Send EDI Invoice failure notifications via email to** option, so the correct user will be notified in case of failures.

5. Click **Submit** to save the changes made to the Invoice Delivery Settings



Access to Invoice Settings is only allowed when the access to **eInvoice** has been enabled.

## 5.4 How to Edit the PO Settings?

The **PO Settings** page allows you to modify the PO Delivery Settings like Customer, Supplier Company & Delivery method along with Supplier, Sender & Buyer Credentials.

### 5.4.1 Editing Purchase Order Delivery Settings

#### To edit Purchase Order Delivery Settings:

1. Navigate to the following location: “Your Display Name” > **Settings** > **PO Settings**

The screenshot displays the 'Purchase Order Delivery Settings' page in the ZYCUS system. The page includes a navigation bar with 'My Dashboard', 'Manage Companies', and user information 'Suresh QA123'. A sidebar on the left contains icons for home, settings, and other functions. The main content area is a form with the following sections:

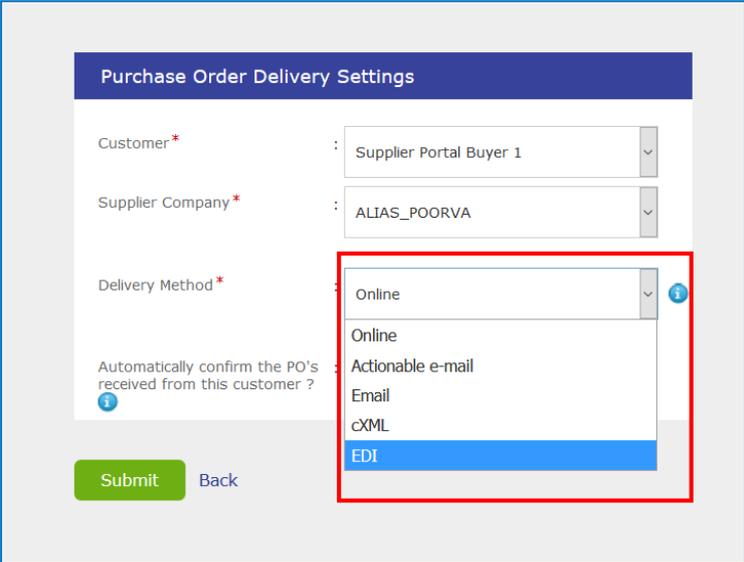
- Customer:** Supplier Portal Buyer 1
- Supplier Company:** ALIAS\_POORVA
- Delivery Method:** cXML
- cXML Version:** 1.2.021
- Order Submission URL:** (empty field)
- Receive cXML notifications for PO cancel, close and amend?:** Yes (selected), No
- Allow ZSN to re-send failed Purchase Orders?:** Yes, No (selected)
- Supplier (To) Credentials:**
  - Domain: (empty)
  - Identity: (empty)
- Sender Credentials:**
  - Domain: (empty)
  - Identity: (empty)
  - Shared Secret: (empty)
- Buyer (From) Credentials:**
  - Domain: EPROC
  - Identity: GE
- Send cXML delivery failures via email to:**
  - Email: (empty)
  - Enter comma separated emails

At the bottom of the form, there are 'Submit' and 'Back' buttons. The footer contains copyright information for 2019, support contact details, and a link to the ZYCUS logo.

2. Select the required **Customer** and **Supplier Company**.

3. Select the required PO Delivery option under the **Delivery Method** option.

4. Perform the required steps based on the **Delivery Method** selected from the drop-down:



- A. **Online:** POs will be visible upon logging into the network. This will be the default PO delivery method for new suppliers.
  - i. Choose if you want to **Automatically confirm the PO's received from this customer**. The default setting will be **No**.
  - ii. Enabling this setting will automatically confirm all PO's sent by your customer.
  
- B. **Actionable Email:** PO will be received as a PDF attachment via e-mail. Actions such as Confirm PO, Reject PO or Create Invoice can be taken from the e-mail itself. This option should be enabled only if tenant level setting for allowing PO actionable e-mails is enabled.
  
- C. **Email:**
  - i. Enter the recipients for the email for the Purchase Order Delivery.
  - ii. In case of multiple recipients, use comma to separate email IDs.
  - iii. Choose if you want to **Automatically confirm the PO's received from this customer**. The default setting will be **No**.
  - iv. Enabling this setting will automatically confirm all PO's sent by your customer.

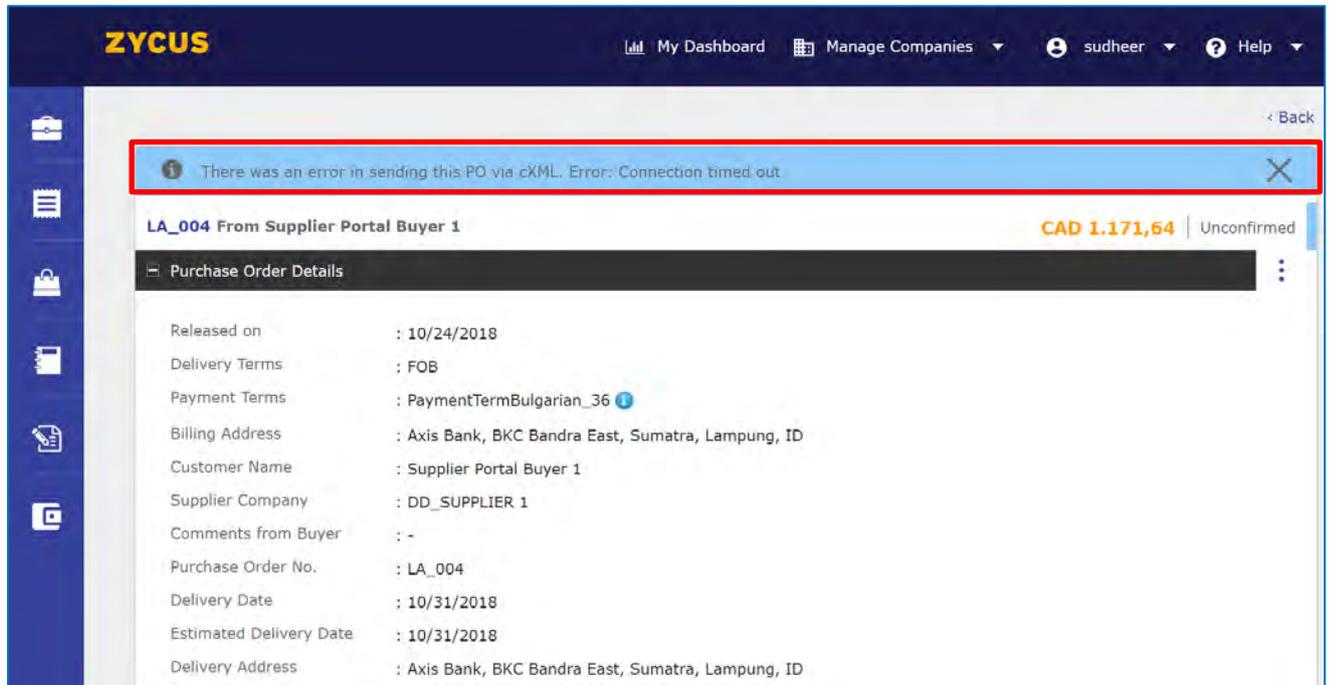
D. **cXML:**

Delivery Method*	:	cXML
cXML Version	:	1.2.021
Order Submission URL*	:	
Receive cXML notifications for : PO cancel, close and amend?*	:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow ZSN to re-send failed Purchase Orders* 	:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Supplier (To) Credentials</b>		
Domain*	:	
Identity*	:	
<b>Sender Credentials</b>		
Domain*	:	
Identity*	:	Sudheer_g2@zycus.com
Shared Secret*	:	••••••••
<b>Buyer (From) Credentials</b>		
Domain*	:	EPROC
Identity*	:	GE
<b>Send cXML delivery failures via email to</b>		
Email*	:	
Enter comma separated emails		

- i. Select the **cXML Version**.
- ii. Enter the **Order Submission URL**.
- iii. Choose whether you want to **Receive cXML notifications for PO cancel, close, and amend details**.
- iv. If you want to **Allow ZSN to re-send failed Purchase Orders**, select **Yes** or else select **No**. A few key points to be noted about this are:
  - This feature is for the integration suppliers that receive Purchase Orders via cXML.
  - In case the Zycus Supplier Network does not receive a success message from the supplier's ERP system, the supplier can authorize ZSN to re-send the PO.
  - When set to **Yes**, ZSN will resend the PO up to *3 times* in intervals of 15 minutes each.
  - If the PO has failed after these attempts as well, an email notification will be sent to the supplier contact configured to receive

these failure emails. The email will contain a consolidated list of PO's that have failed over the past few hours.

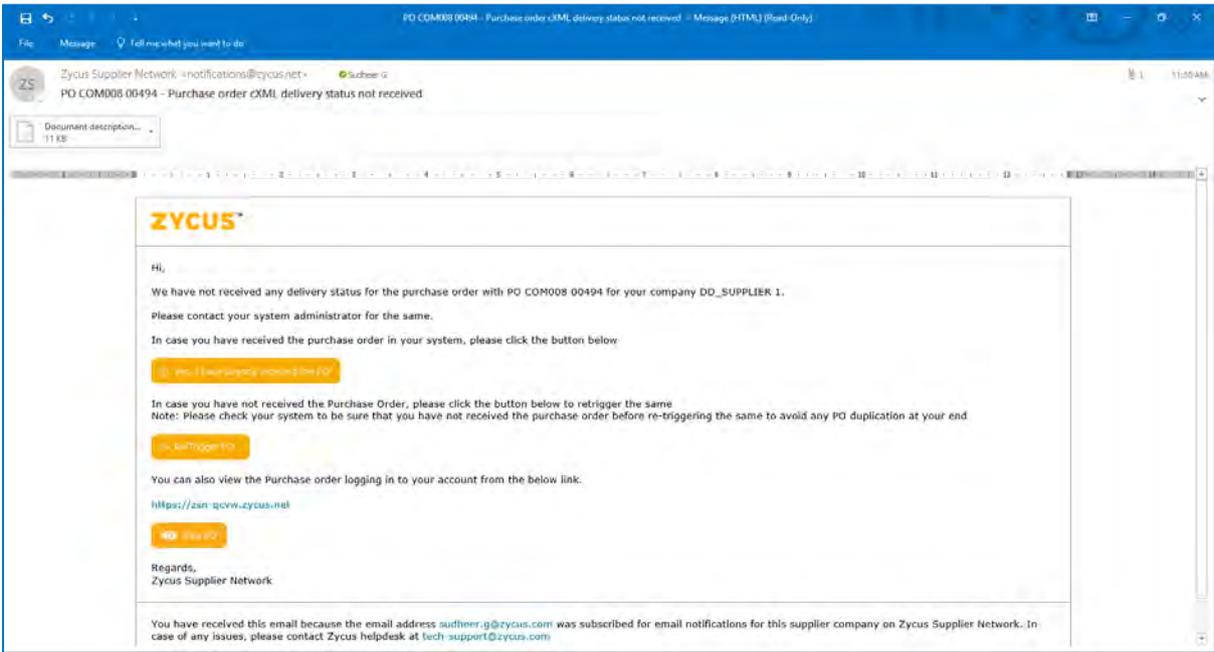
- The cXML response received from the supplier system will be shown against each PO, with an option to resend the PO. The reason for failure can be seen upon opening the PO as shown in the following screenshot:



- A yellow warning icon, , will be shown against such invoices on the PO listing page.
  - v. Enter the required information in the **Supplier (To) Credentials**, **Sender Credentials** and **Buyer (From) Credentials**.
  - vi. You can configure an email for **cXML delivery failures** messages, so the correct user will be notified in case of failures.

#### Note: Re-Triggering Of cXML From The Failure Email Notification

If ZSN fails to send the PO via cXML to a supplier, an email notification will be sent to the supplier based on email notification setting in ZSN which will have the **Retrigger** button as shown in the image below:



This setting in ZSN allows the supplier to input the email IDs who will be notified in case of any cXML failure via email. If the retrigger action is taken from any one of the email id's, ZSN will perform the PO cXML retrigger.

Once the cXML status is successful, the supplier will not be able to retrigger it again. If a Re-Trigger action is taken, it will be locked for 3 Minutes or till the time ZSN do not receive the status of cXML (whichever is less in time interval). This will avoid any chance of duplication if any other supplier contact tries to click the retrigger button.

- E. **EDI (Electronic Data Interchange):**  
When the EDI option is selected, the customers EDI qualifier and address will be displayed. (This will help the supplier set-up his VAN and not reach out to customer/Zycus separately for customer EDI details).

- i. Select the method used for transmitting EDI messages under the **Type** drop-down.

**Note:** *Zycus currently supports EDI via VAN (Value Added Network)*

ii. Select the **EDI Address Qualifier** from the drop-down list available.

**Note:** EDI Address Qualifier is a 2-character code which represents the type of EDI Address. Zycus currently supports the ANSI ASC X12 EDI Standard, version 4010

iii. Enter the **EDI Address** for sending the PO.

**Note:** The EDI option is a Value Added Service and suppliers can only select it if their customer has enabled it. Otherwise it will be Disabled (greyed out).

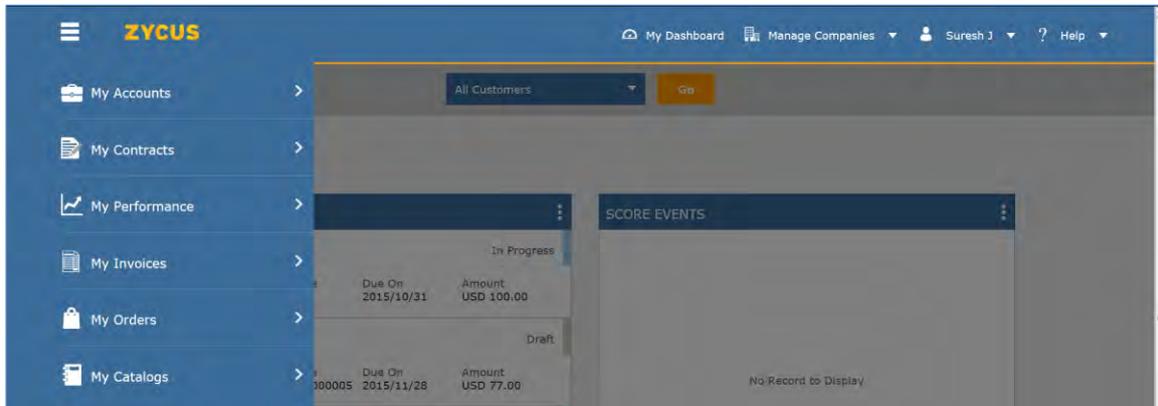
5. Click **Submit** to save the changes made to the Purchase Order Delivery Settings.

 Access to PO Settings is only allowed when the access to **eProc** has been enabled.

 EDI Enabled Suppliers will get email notification in case of PO amend.

## Chapter 6: What is a Side Panel?

The Side Panel on the ZSN Portal allows convenient access to options available to you. The Side Panel can be accessed by clicking the  icon present on the top left of the screen.



The Side Panel provide access to the following option:

1. **My Accounts** – Allows access to Companies, Requests & Alerts from the Supplier Management portal
2. **My Invoices** – Allows access to view invoice created by your Customers & to create PO & Non PO Invoices
3. **My Orders** – Allows access to Purchase Orders linked to the eProcurement portal of **Zycus**
4. **My Catalogs** – Allows access to Catalogs linked to the eProcurement portal of **Zycus**
5. **My Payments** - Allows access to Payments linked to the eInvoicing portal of **Zycus**

### 6.1 How to Navigate using the Side Panel?

To navigate among various modules of Zycus Supplier Network, click on the  icon present at the top left. Click on the required module, the sub modules (if any) is displayed. Hover over the sub module and select the required Customer.



### 6.2 My Accounts

The My Accounts option allows the user to view Companies, Requests & Alerts from the Supplier Management portal of **Zycus**.

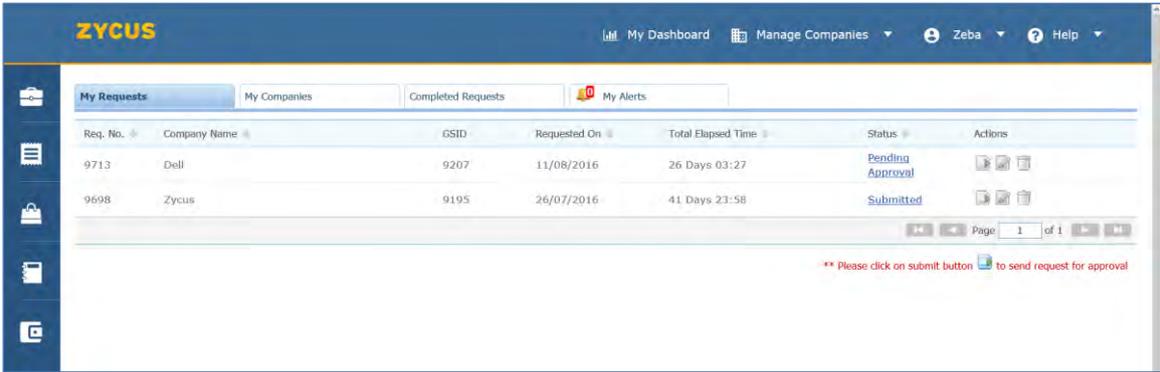
**My Accounts** tab consist of views like:

- a) My Request
- b) My Companies
- c) Completed Requests
- d) My Alerts

1. **My Requests** tab:

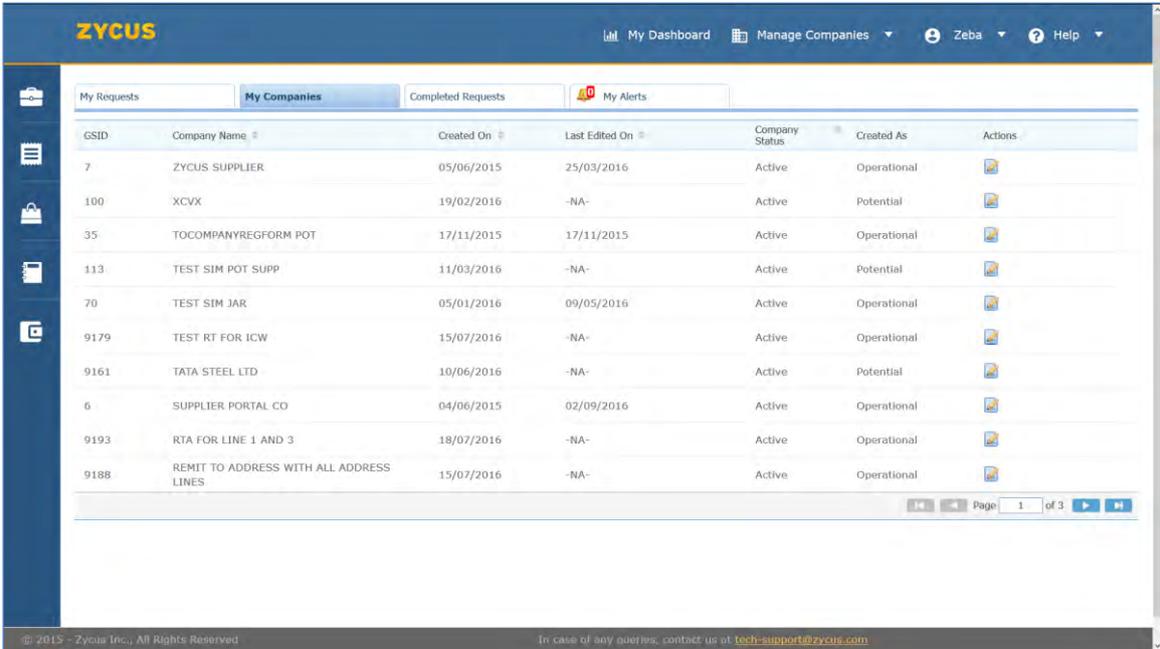
- a. **Submit** Requests
- b. **Edit** Requests

c. Delete Requests



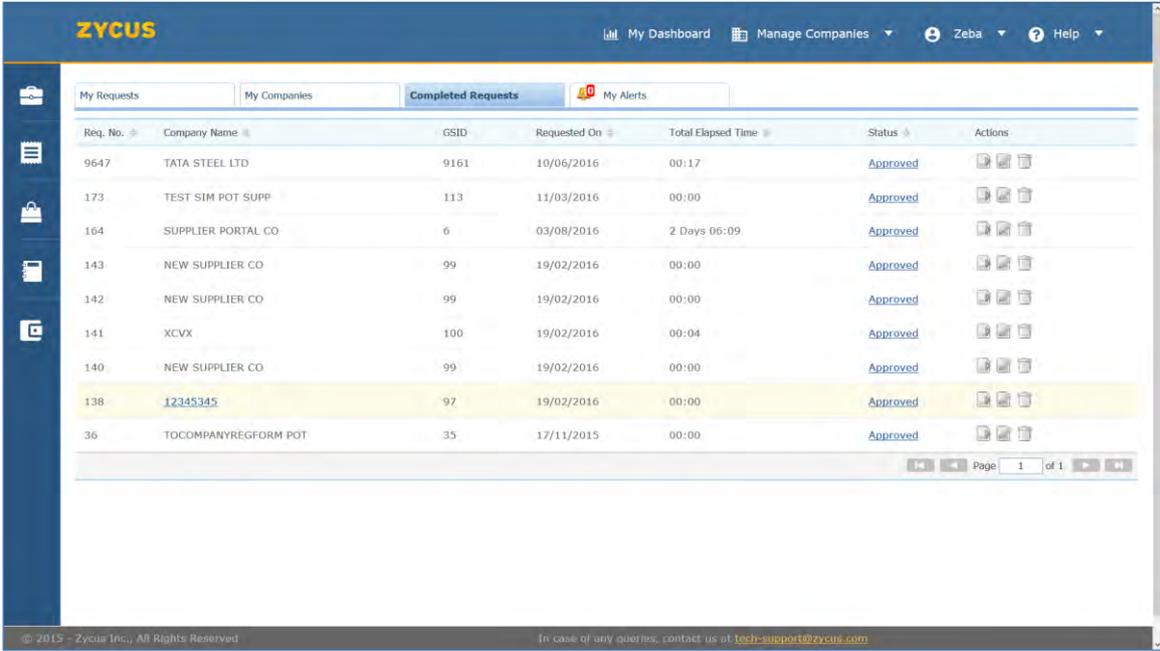
2. My Companies tab:

a. Edit Company Details

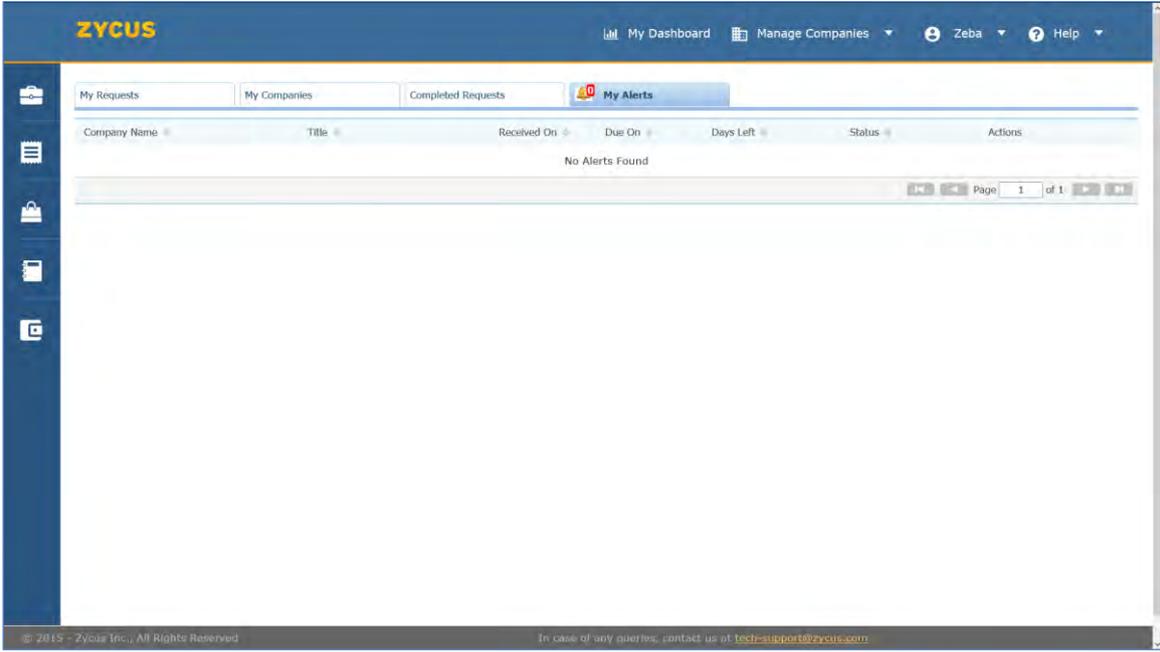


3. Completed Requests tab:

- a. View Company Details
- b. View Approval Status Updates



- 4. My Alerts tab:
  - a. View Company Details
  - b. Act on the Alert



## 6.2.2 How to Manage My Requests?

The **My Requests** tab allows the user to view the supplier companies registered using **ZSN**.

### 6.2.2.1 *How to Submit a Request?*

#### To submit a Supplier Company Request:

1. Navigate to the following location: Side Panel > **My Accounts** > Required Supplier Company
2. Look for the required Supplier Company with **Status** as **Saved as Draft**
3. Click on the  icon corresponding to the required supplier company.



*Submitting a Supplier Registration request with incomplete/missing details, will display an error message similar to the one shown below:*

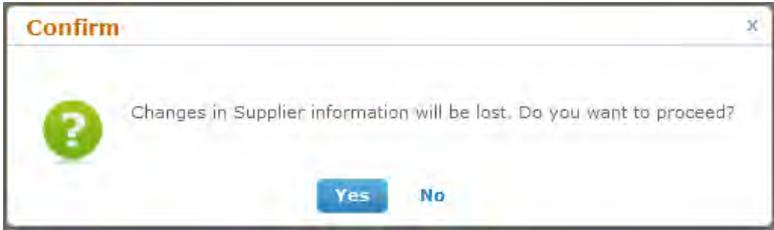
 Please fill the views '[Company Details-Commercial Requirement, Company Details-SAGIA Details]' assigned to you, before submitting the request.

### 6.2.2.2 *How to Edit a Request?*

#### To edit a Supplier Company Request:

1. Navigate to the following location: Side Panel > **My Accounts** > Required Supplier Company
2. Look for the required Supplier Company with **Status** as **Saved as Draft**
3. Click on the  icon corresponding to the required supplier company.
4. Make the required changes in the Supplier Company Request.
5. Perform any one of the following actions as required:
  - A. **Save as Draft:** To save the changes made in the draft Supplier Company Request.
  - B. **Save & Submit:** To save the changes made in the draft Supplier Company Request and submit the request for approval.
  - C. **Cancel:** To discard the changes made in the draft Supplier Company Request and exit.

If **Cancel** is clicked, the following dialog box is displayed:



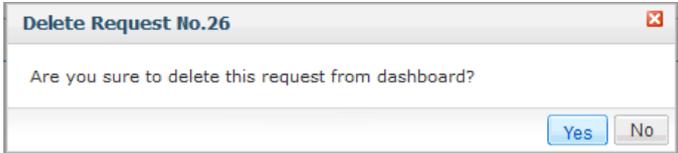
Click **Yes** to discard changes made and exit. Click **No** to keep the changes made and return to editing.

Only Supplier Company Registration requests with status **Saved as Draft** can be edited.

### 6.2.2.3 How to Delete a Request?

**To delete a Supplier Company Request:**

- 1. Navigate to the following location: Side Panel > **My Accounts** > Required Supplier Company
- 2. Look for the required Supplier Company with **Status** as **Saved as Draft**
- 3. Click on the icon corresponding to the required supplier company.



- 4. Click **Yes** to delete the Supplier Company Request.

Only Supplier Company Registration requests with status **Saved as Draft** can be deleted.

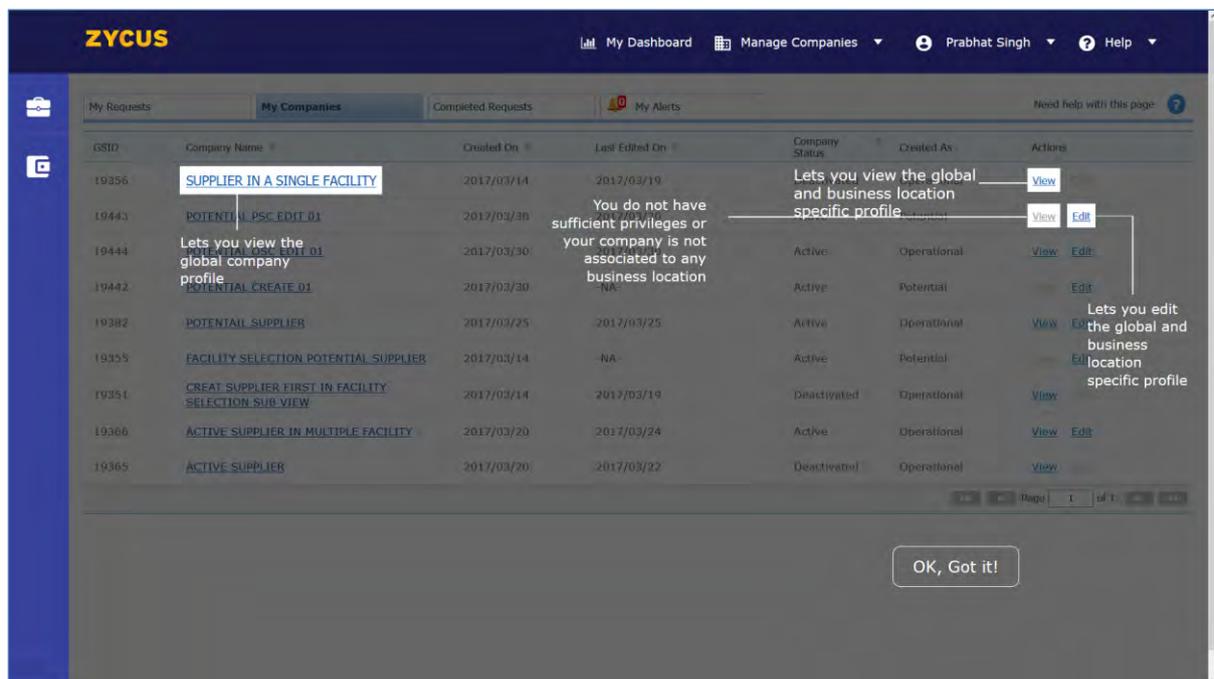
## 6.2.3 My Companies

The **My Companies** tab allows the user to view the current on-boarded supplier companies.

### 6.2.3.1 *How to Edit a Supplier Company?*

#### To edit a Supplier Company:

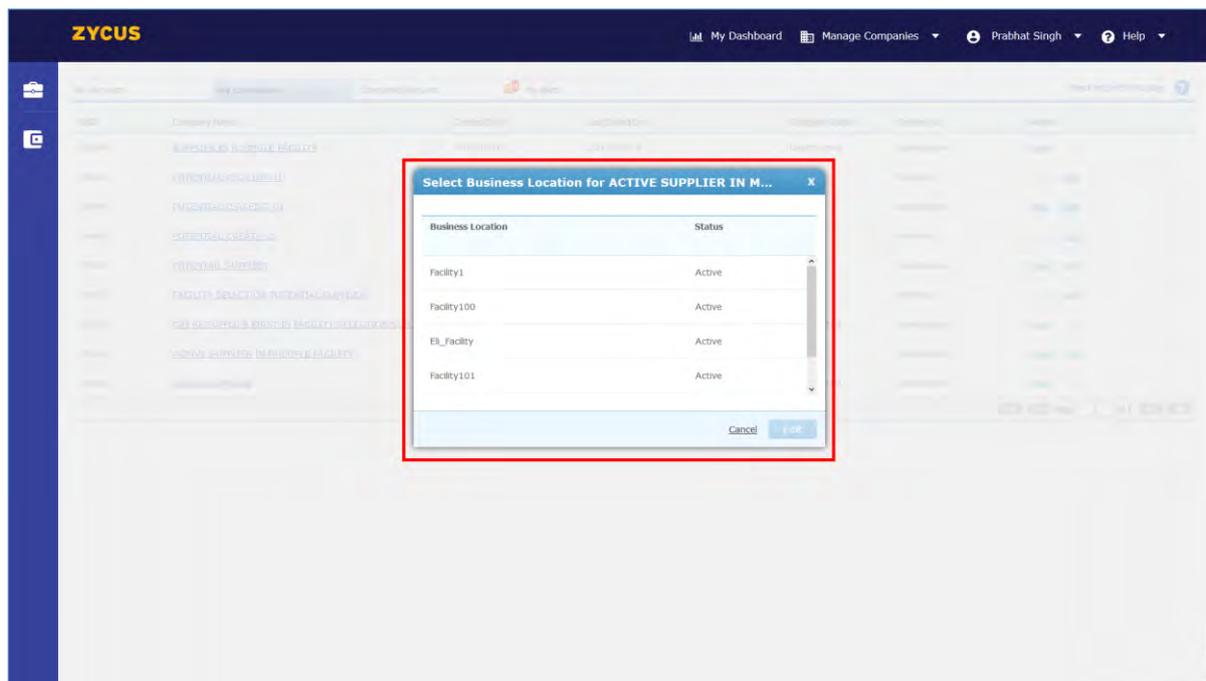
1. Navigate to the following location: Side Panel > **My Accounts** > Required Supplier Company
2. Navigate to the **My Companies** and look for the required Supplier Company



3. Click **Edit** from the **Actions** column corresponding to the required supplier company.

**Note:** The **Edit** or **View** hyperlinks will be deactivated if you don't have sufficient rights.

4. Select a business unit to edit.

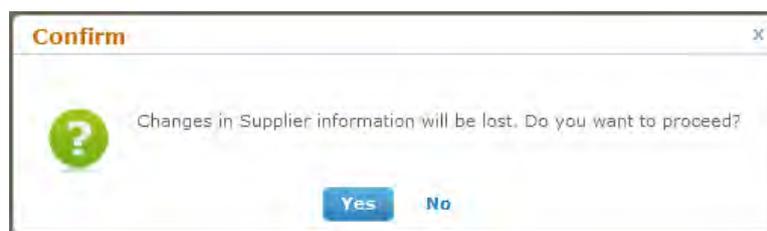


5. Make the required changes in the Supplier Company.

6. Perform any one of the following actions as required:

- A. **Save as Draft:** To save the changes made in the draft Supplier Company Request.
- B. **Save & Submit:** To save the changes made in the draft Supplier Company Request and submit the request for approval.
- C. **Cancel:** To discard the changes made in the draft Supplier Company Request and exit.

If **Cancel** is clicked, the following dialog box is displayed:



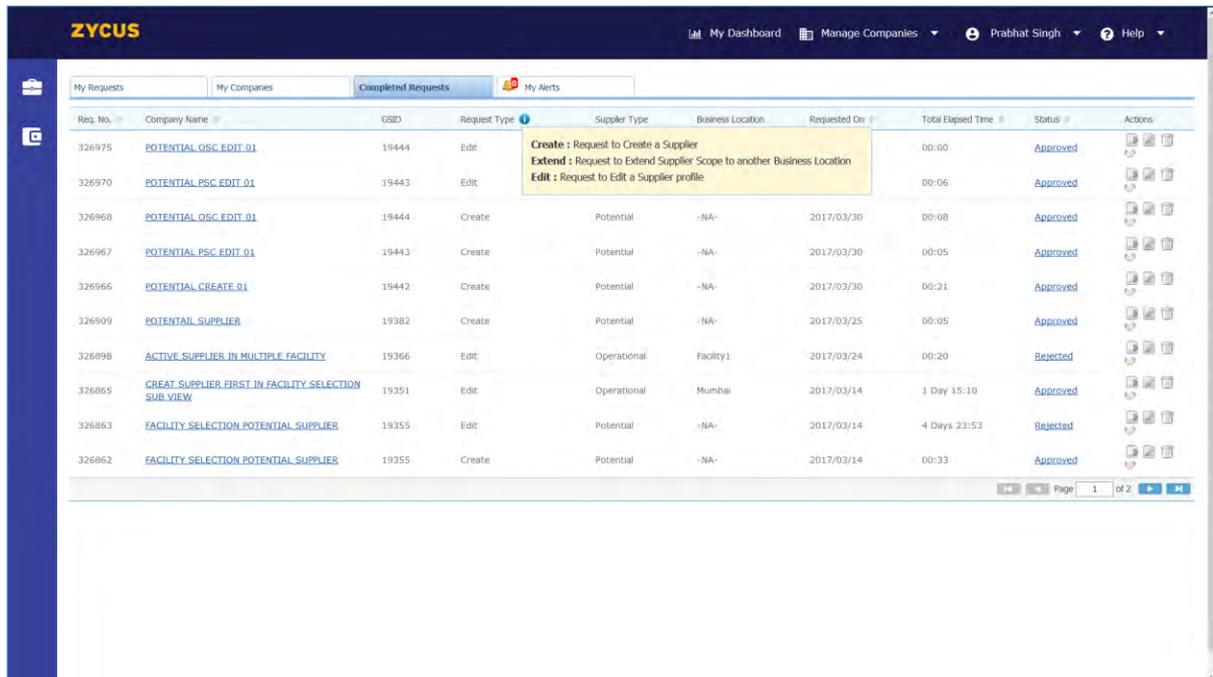
Click **Yes** to discard changes made and exit. Click **No** to keep the changes made and return to editing.



*Only Supplier Company Registration requests under the Users scope can be edited.*

## 6.2.4 Completed Requests

The **Completed Requests** tab allows the user to view the supplier company requests that have passed through the Approval Workflow.

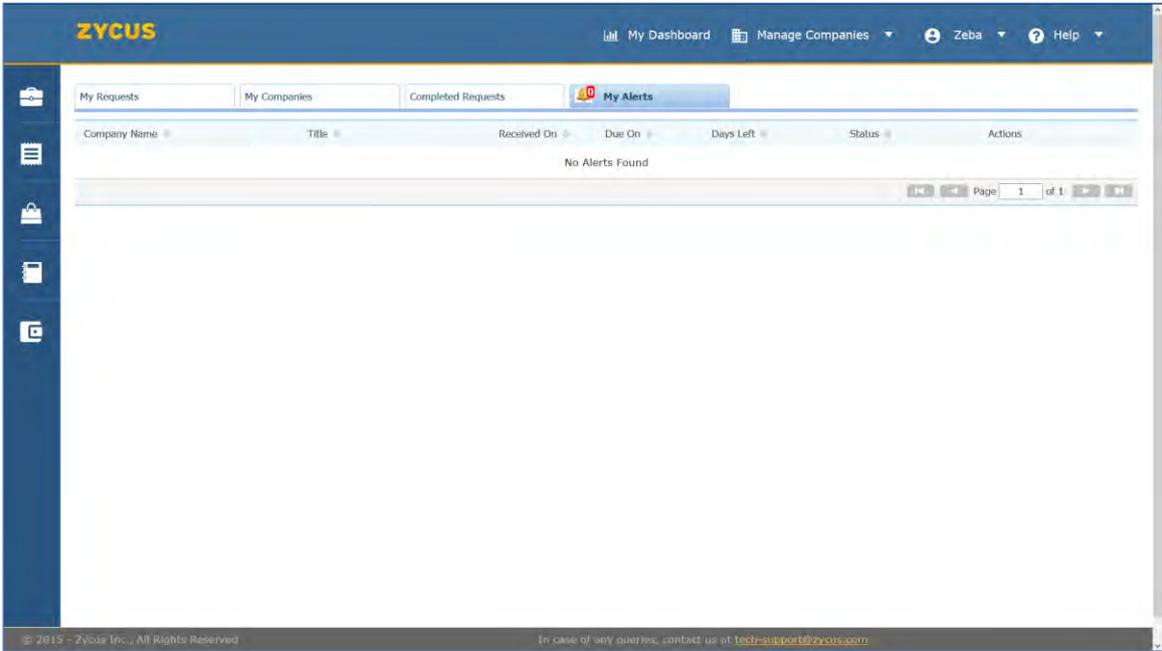


Clicking on the **Status** of the supplier company request, displays the details of the Approval Workflow of the Supplier Company Request.

Status		
➔ Activity Details for Request No. 8		
Role	Activity	Performed On
Sup_Contact	created	08/05/2015
Sup_Contact	submitted	08/05/2015
Requestor	proceed	08/05/2015
Requestor	approved	08/05/2015

### 6.2.5 My Alerts

The **My Alerts** tab allows the user to view the alerts for which some action needs to be taken by the User. Once the required action is acted on by the User, the status of the Alert can be changed.



#### 6.2.5.1 *How to Act on an Alert?*

**To act on an Alert:**

- 1. Navigate to the following location: Side Panel > **My Accounts** > Required Supplier Company
- 2. Navigate to the **My Companies** and look for the required alert
- 3. Click on the  icon corresponding to the required alert.



4. Select the **Status** of the alert as per requirement.

 Click on the  icon to view details about each Status.

5. Enter the required **Comments** in the text box.

- 6. Perform any one of the following actions as required:
  - A. **Submit**: To save the changes made in the alert and exit.
  - B. **Cancel**: To discard the changes made in the alert and exit.

### 6.3 My Contracts

**NOTE:** The above-mentioned menu **may or may not be available** based on the access provided to you by customer.

The **My Contracts** option allows the user to view all the contracts linked to the customer company.

- 1. Click on **My Contracts**. You will get an option of **View Contracts**.
- 2. Hover over **View Contracts**, you will be able to see list of customer company whose contracts you want to see.



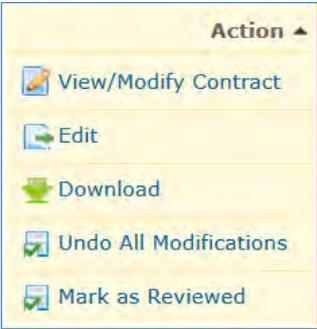
3. Select the customer of your choice; you will be navigated to the following page.

Contract Number	Title	Requested By	Requested On	Status	Action
AUTO10048	testing 16.01	rahul c	2016/02/18	Under External Review	Action

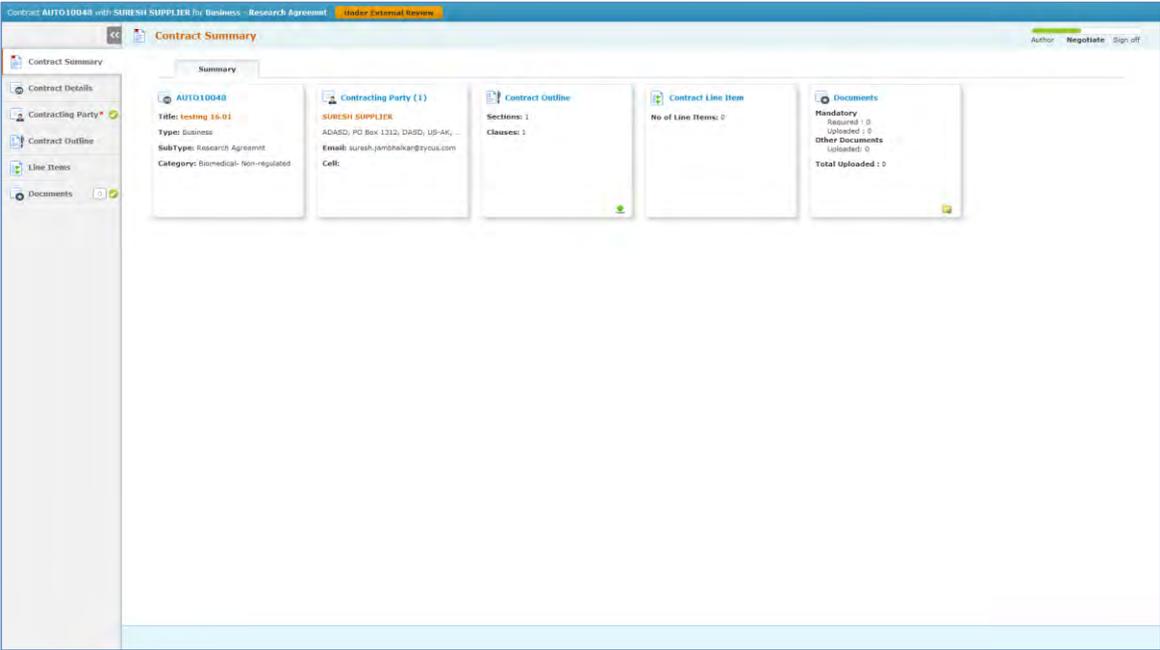
4. You can search for contracts awaiting review by Contract Number or Contract Title.

Search by Contract Number

5. Against any contract number, click on the Actions drop-down menu. You will get following options:



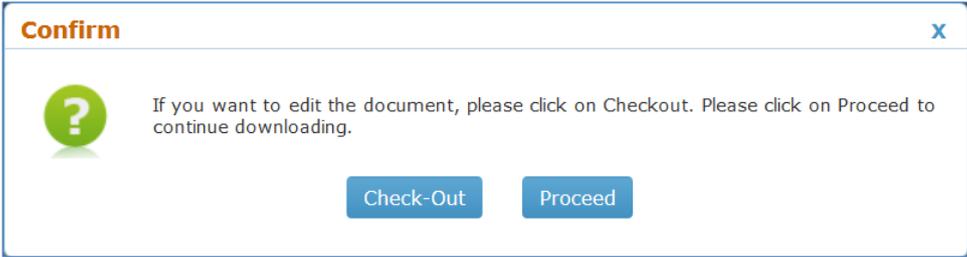
6. You can view or modify contract. You will be navigated to authoring contract page in a new window.



7. You can edit the contract. A download popup will be displayed. You can save it on your local system.



8. You will also be able to download a contract. You will get following popup:



You can click proceed or check-out.

9. You can also undo all the modifications made to the current contract. You will get following popup:



Select **yes** or **no** as per your requirement.

10. You will also be able to mark the contract as reviewed. Click **Mark as Reviewed**, you will get following comment box.



11. Enter your comments as per your review and click **Submit**. The contract owner will be notified through an email.

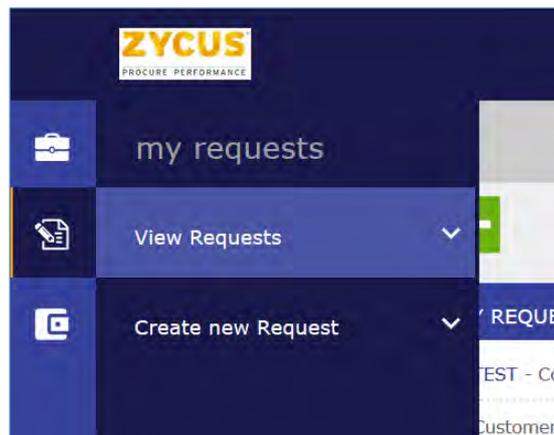
## 6.4 My Requests

**NOTE:** The above-mentioned menu **may or may not be available** based on the access provided to you by customer.

In scenarios when the supplier wants to request a few changes with respect to pricing, delivery terms, and delivery locations and so on, he can raise such request from this section.

My Requests option allows the user to:

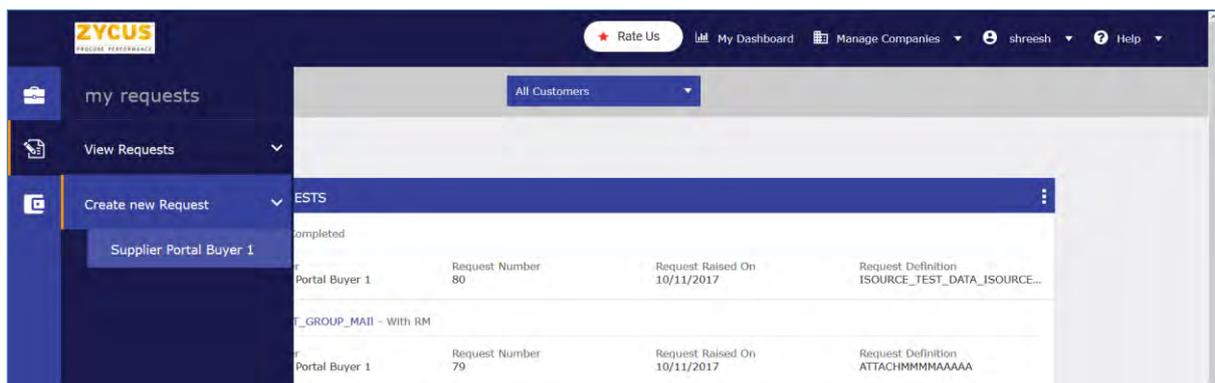
1. Raise a new request
2. View the status of requests



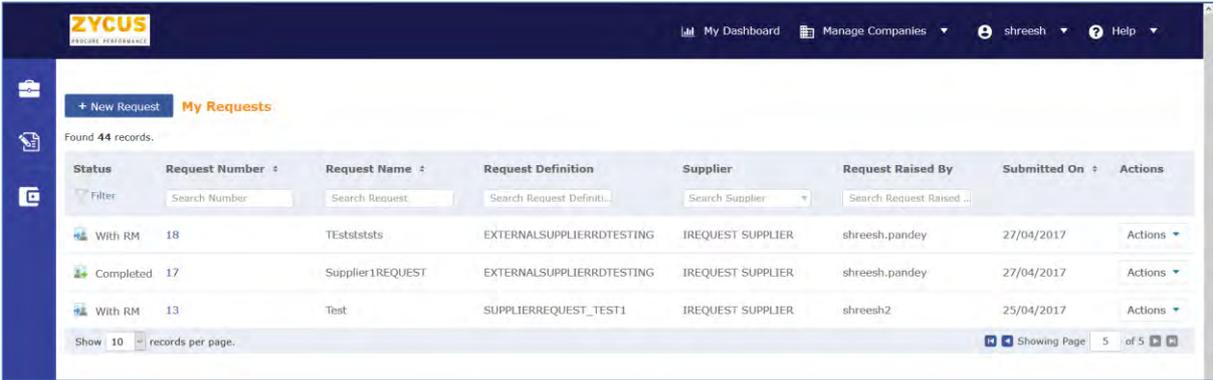
### 6.4.1 How to Raise a Request?

To raise a request, go to:

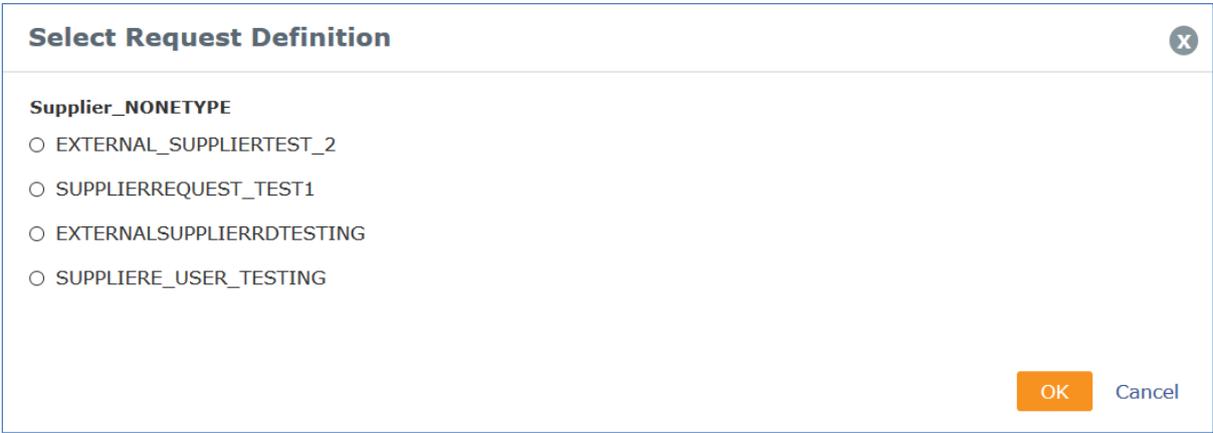
1. Side Panel > My Request > Create New Request > select the buyer company.



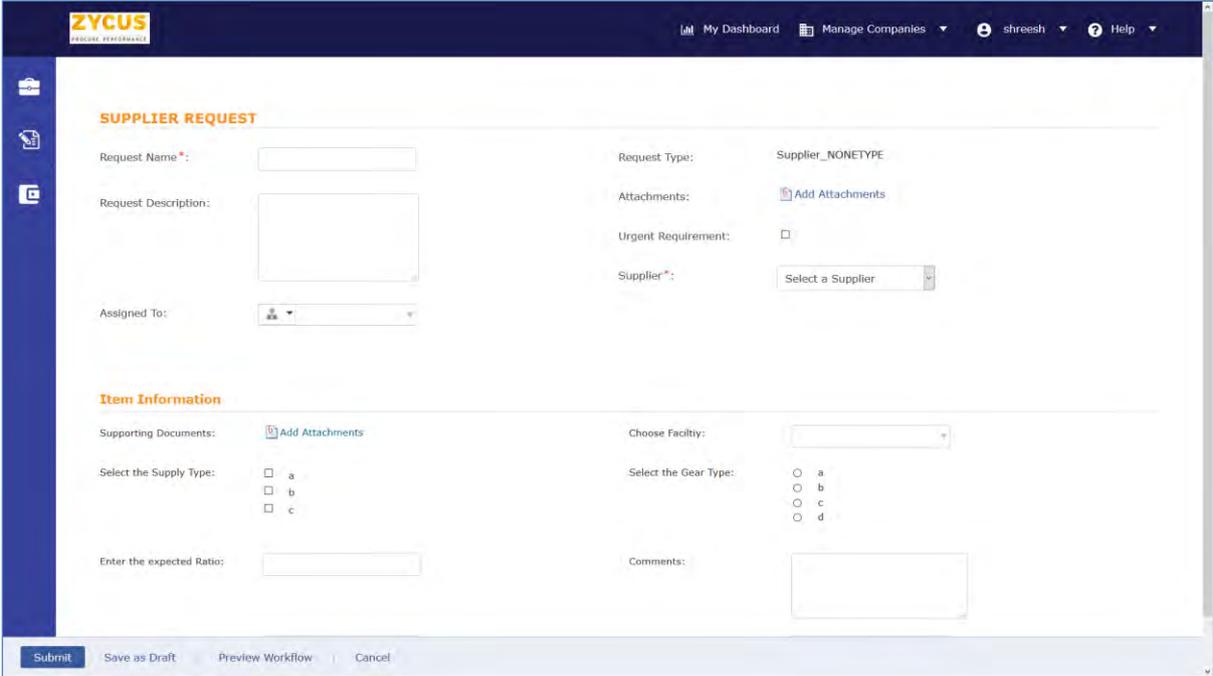
2. You will land on the following page:



3. Click **+New Request**. You will see the following popup and you will need to select a request definition and click **OK**.
4. The request definitions you see in this popup will be configured by your buyer.

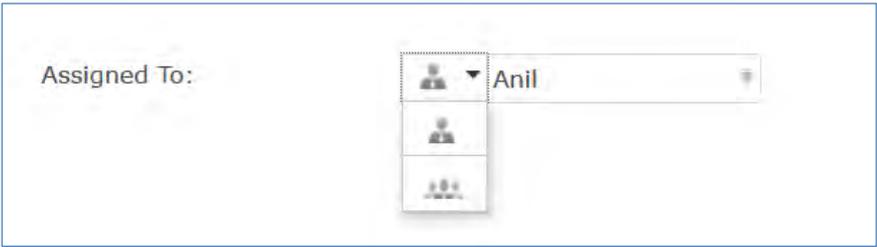


5. On select the request definition, you will land on the following page:



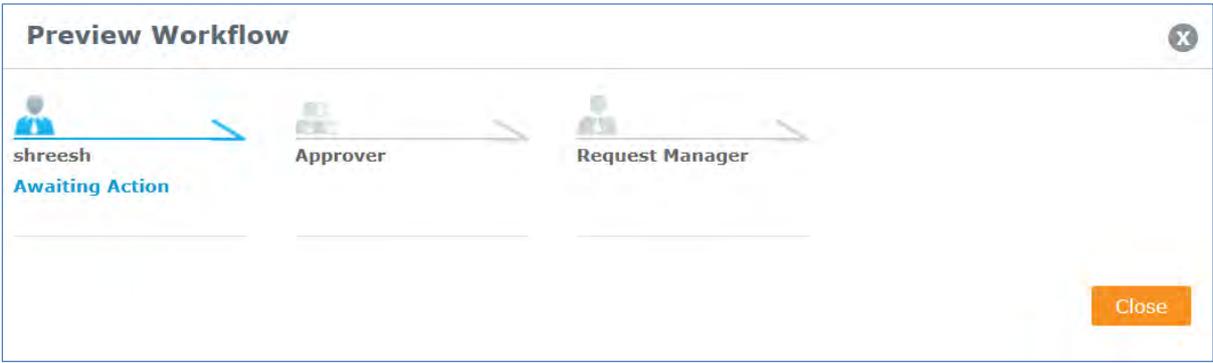
**Section One:**

- 1. In this section, you will need to add at least the basic details such as **Request Name** and **Supplier**.
- 2. In addition, you can also add your **Request Description**, **Attachments** (any supporting documents), and mark the request as **Urgent Requirement**.
- 3. Once these details are filled, select to whom in the buyer organization you want to assign this request. You can select a single buyer or a buyer group.



**Section Two:**

- 4. The fields in this section are custom and configured by your buyer. This section will vary from buyer to buyer.
- 5. Once the details for this section are filled, you can choose to review the workflow this request will follow. Click **Preview Workflow**, which is available in the footer of the page. You will see the following popup:



- 6. Once all the information is in place, you can either **Submit** the request or **Save it as Draft**.
- 7. Saving it as draft will allow you to work on it later. Once you hit Submit, the workflow will be triggered, and you won't be able to make any changes.
- 8. Such requests will be visible on the **My Request > View Requests** page as shown below:

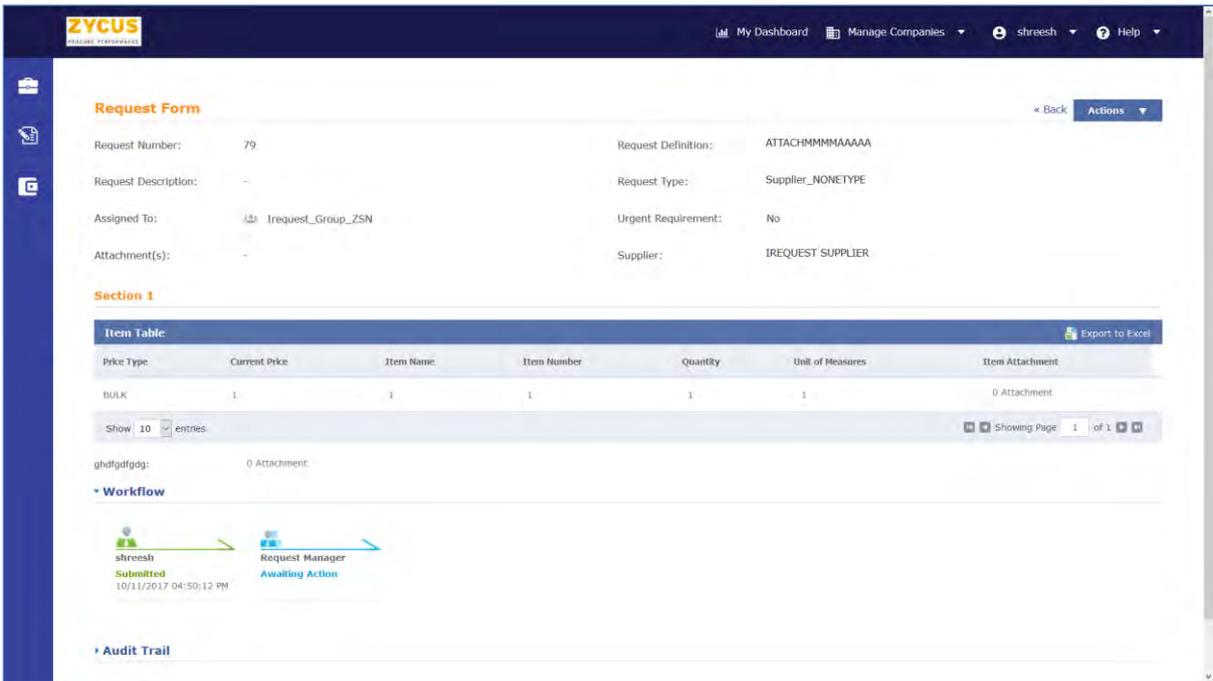
Status	Request Number	Request Name	Request Definition	Supplier	Request Raised By	Submitted On	Actions
With RM	32	TEST	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	09/05/2017	Actions
With RM	30	Test11111111	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	09/05/2017	Actions
Completed	29	EXTERNAL_WITHOUT_SUPPLIER	SANITY_FOR_EXTERNAL_USER	IREQUEST SUPPLIER	shreesh.pandey	03/05/2017	Actions
Completed	28	TASKLINK	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	03/05/2017	Actions
Completed	26	TEST1	TESTAUDITTRAIL	IREQUEST SUPPLIER	shreesh.pandey	02/05/2017	Actions
Returned	25	123123	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	02/05/2017	Actions
Draft	24	TESTDRAFTCOLORCODE	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	-	Actions
Rejected	23	SUPPLIER1TEST	SUPPLIERS_USER_TESTING	IREQUEST SUPPLIER	shreesh.pandey	28/04/2017	Actions
Completed	22	SUPPLIERUSER1	SUPPLIERS_USER_TESTING	IREQUEST SUPPLIER	shreesh.pandey	28/04/2017	Actions
Awaiting Approval	19	DRAFT	SUPPLIERREQUEST_TEST1	IREQUEST SUPPLIER	shreesh.pandey	27/04/2017	Actions

### 6.4.2 How to View the Requests?

1. To view the request you have raised, go to: Side panel > My Requests > View Requests > select the buyer company. You will land on the following page:

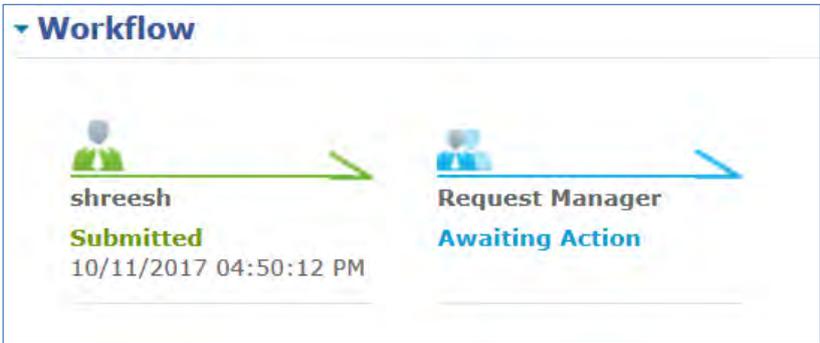
Status	Request Number	Request Name	Request Definition	Supplier	Request Raised By	Submitted On	Actions
With RM	54	ZSNREQUESTAUTOMATIONFTSDC_70662	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions
With RM	53	ZSNREQUESTAUTOMATIONHRCSX_90383	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions
With RM	52	ZSNREQUESTAUTOMATIONVECI1_76351	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions
With RM	51	ZSNREQUESTAUTOMATIONSMHBU_37735	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions
With RM	50	ZSNREQUESTAUTOMATIONSCNNI_18260	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions
With RM	49	ZSNREQUESTAUTOMATIONXKFAZ_60828	AutomationRDMZKQL_85827	IREQUEST SUPPLIER	shreesh.pandey	27/10/2017	Actions

2. On this page, you will see the requests by all the users raised from your organization.
3. For the requests which are in Draft status will be editable.
4. To view a request, click the **Request Number**. You will land on the following page:



**Note:** All the sections and their field (except **Workflow** and **Audit Trail**) will vary depending on your buyer company.

5. The **workflow** section will show the status of your request.



6. The **audit trail** will display all the changes made to the request from the time it was submitted.

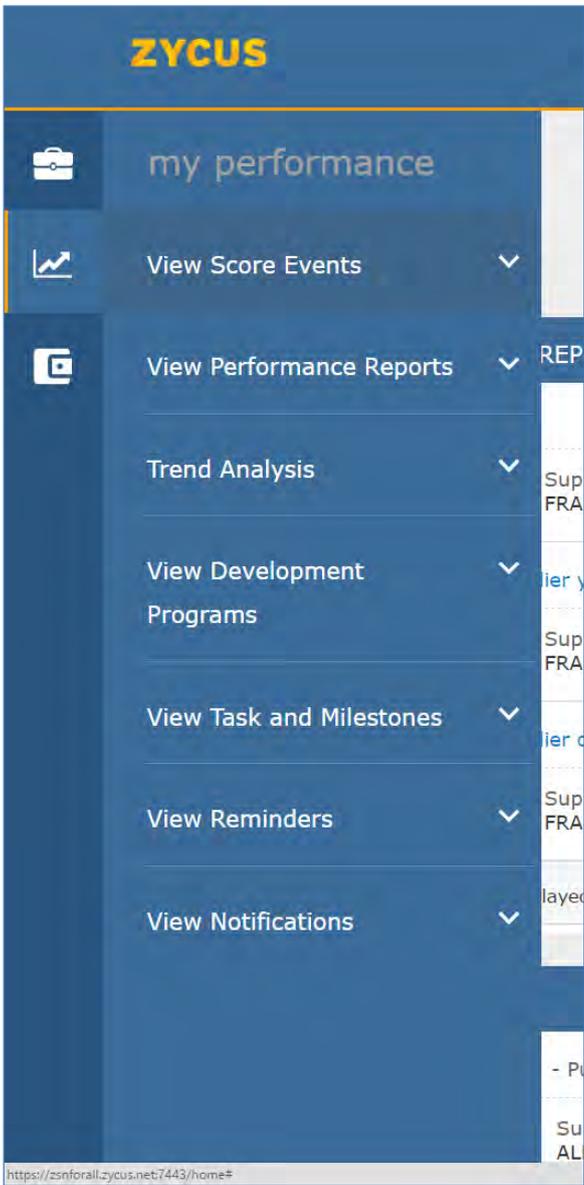
Audit Trail			
Actions	Version	Date	Comments
Request Completed	3	09/11/2017	Please review the process
Request Modified	2	09/11/2017	added the delivery parameters
Request Submitted	1	09/11/2017	

## 6.5 My Performances

**NOTE:** The above-mentioned menu **may or may not be available** based on the access provided to you by customer.

The **My Performances** option allows the user to view:

- 1. Score Events
  - 2. Performance Reports
  - 3. Development Programs
  - 4. Tasks and Milestones
  - 5. Reminders
  - 6. Notifications
- for each customer.



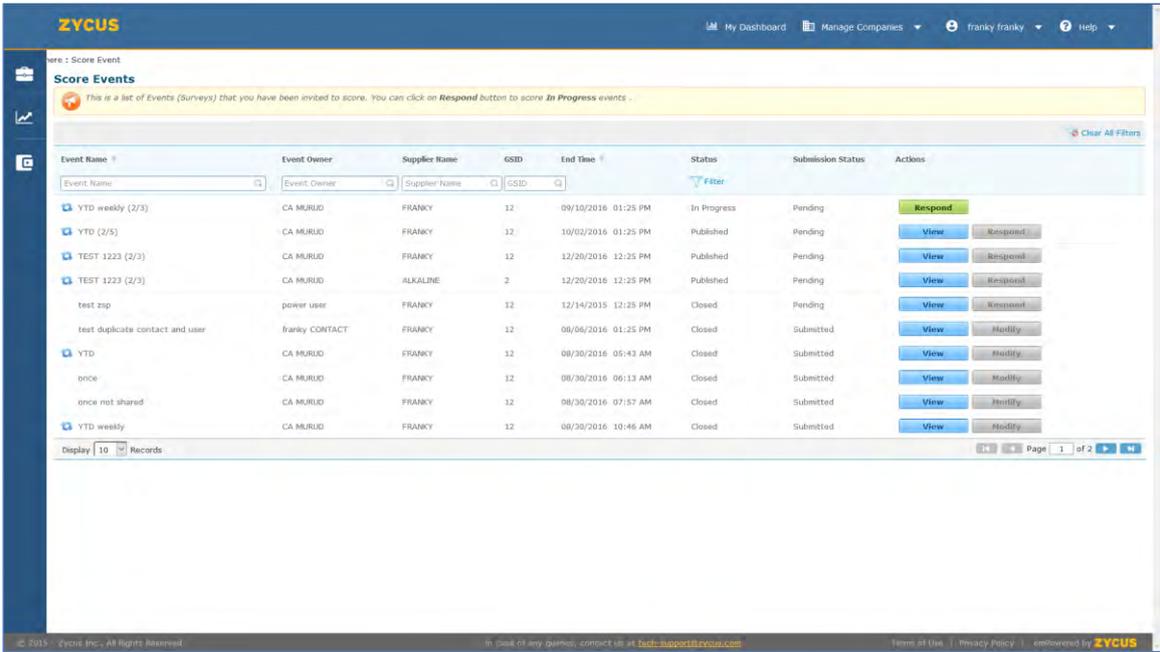
### 6.5.1 How to View Score Events?

Under **My Performance**, hover over **View Score Events**. A list of Customer Company will be provided. Select the customer company of your choice for whom you want to score the event.

Once you have reached the scoring events page, follow the steps mentioned below to the score the event online through the system itself.

#### 6.5.1.1 *Scoring Events Online* **To score an event online:**

1. Once you click on the link from the email, the **Score Events** page is displayed:

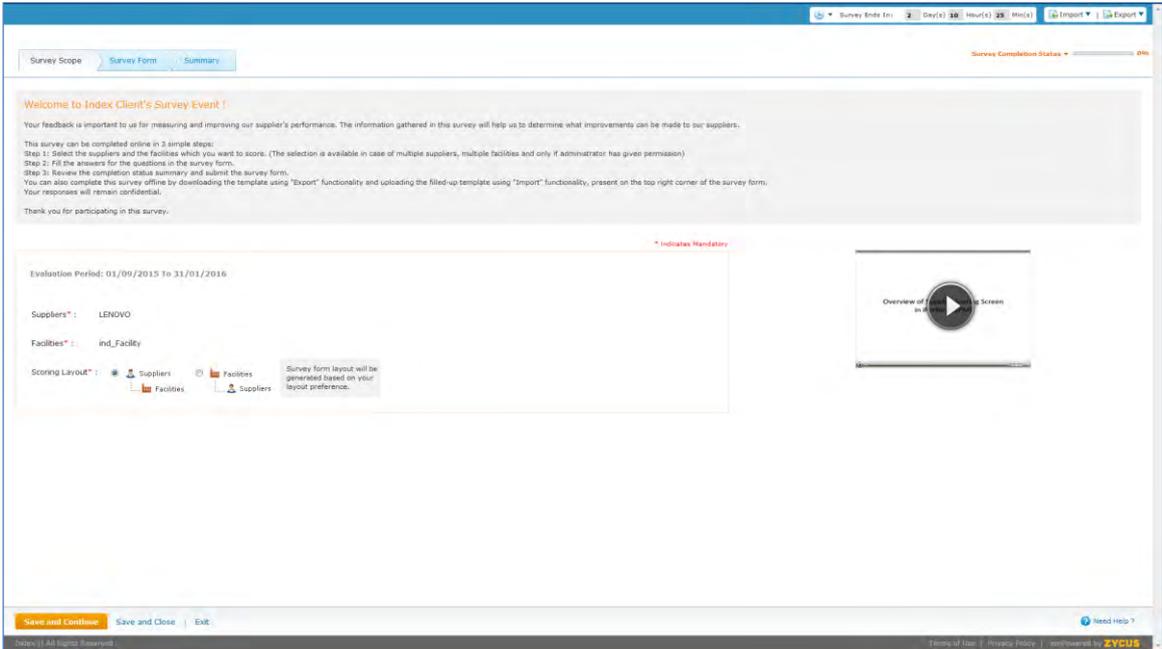


2. Search for the required event using the **Event Name** and/or the **Event Owner** search box.



3. Click on the **Respond** button in the **Actions** column for the corresponding event to open the survey.

4. The survey page is displayed with the **Survey Scope** tab open.

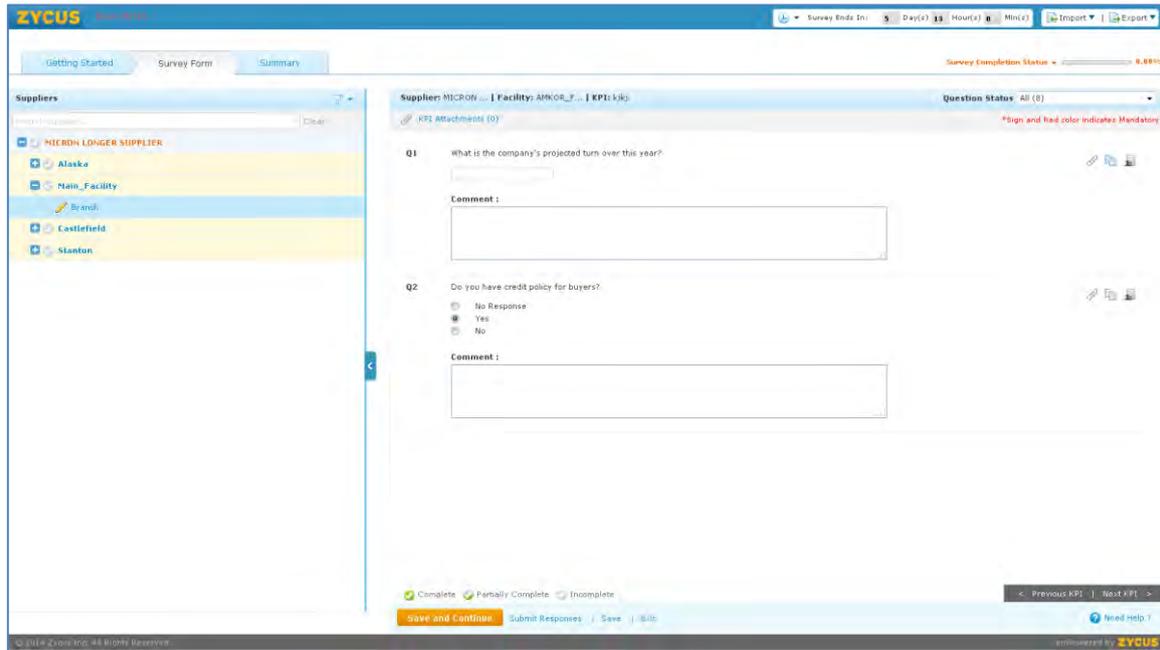


5. Select the **Scoring Layout** from the given options:

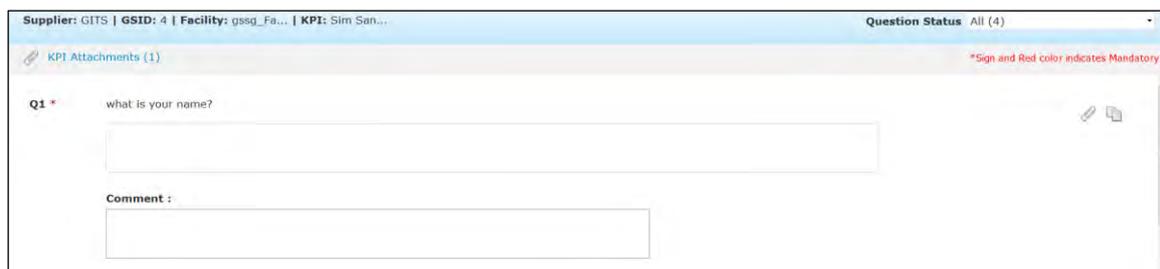


Layout	Description
	Select the <b>Suppliers to Facilities</b> layout to score a supplier linked to multiple facilities.
	Select the <b>Facilities to Suppliers</b> layout to score multiple suppliers linked to a single facility.

6. Click on the **Save and Continue** button to continue with the survey. The **Survey Form** is displayed.



7. Expand the required facility or supplier using the  icon to view the list of KPI's.
8. Select the required KPI from the list of KPI's displayed. The list of questions associated with the KPI will be displayed.
9. Provide answers for all the questions.
10. Perform any of the following actions for any of the question as required:
  - a. **Comment:**
    - i. Provide a comment for a question in the survey



**b. Attachment:**

- i. To attach a document for a question in the survey, click on the  icon next to the question.
- ii. A dialog box is displayed with the **Attachments** tab open.

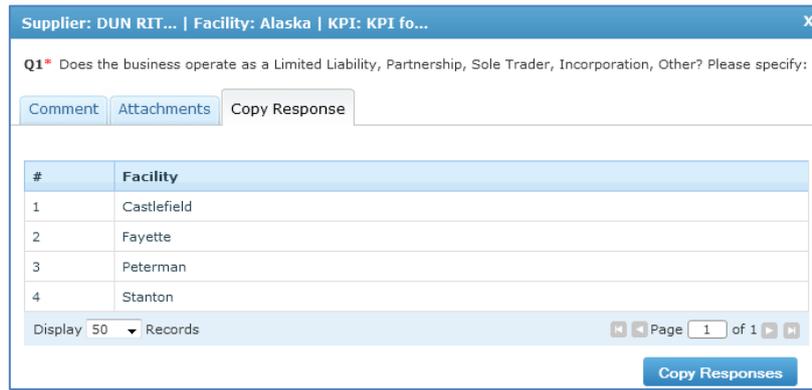


The screenshot shows a dialog box titled "Supplier: DUN RITE LAWN M... | Facility: Alaska | KPI...". The question is "Q1\* Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify:". Below the question are three tabs: "Comment", "Attachments", and "Copy Response". The "Attachments" tab is selected. Below the tabs is a yellow "Upload Files" button. Underneath is a table with columns "File Name", "Size", and "Actions". The table currently contains the text "No Attachment Found."

- iii. Click on the **Upload Files** button to upload the document.
- iv. The **File Upload** dialog box is displayed. Browse and select the required file.
- v. Click on the **Open** button to upload the document.
- vi. The uploaded file will be displayed in the table along with its size.
- vii. To complete the process, click on the **Done** button.

**c. Copy Response:**

- i. To copy response for a question in the survey form to a survey form for another facility/supplier, click on the  icon next to the question.
- ii. A dialog box is displayed with the **Copy Response** tab open.



Supplier: DUN RIT... | Facility: Alaska | KPI: KPI fo...

Q1\* Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify:

Comment Attachments Copy Response

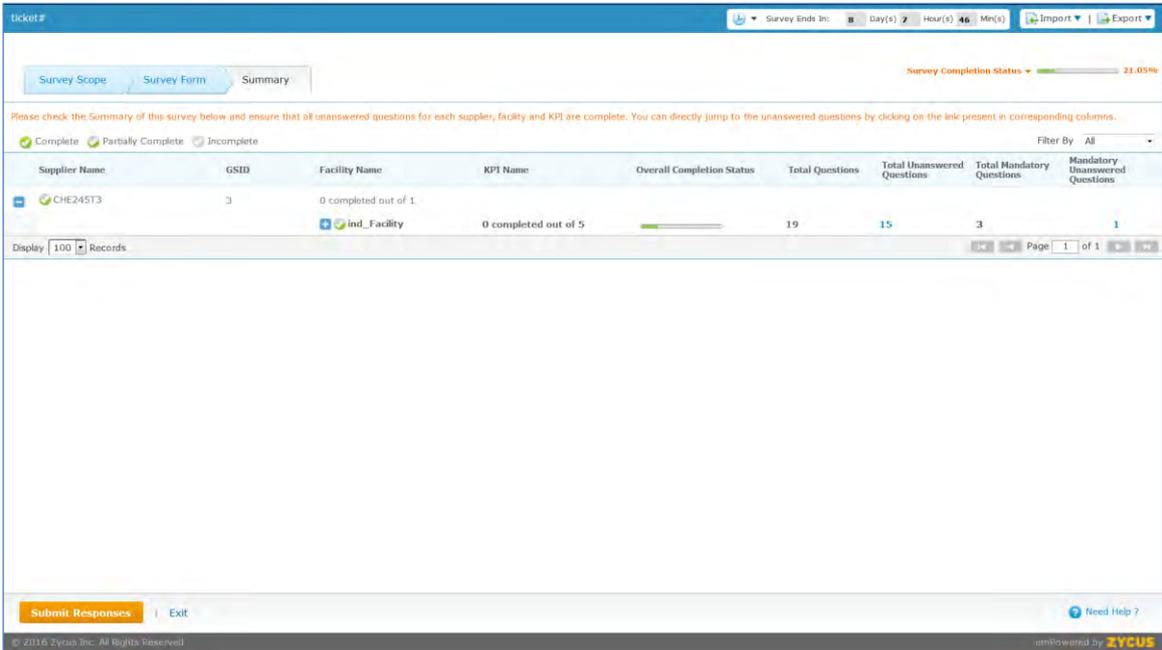
#	Facility
1	Castlefield
2	Fayette
3	Peterman
4	Stanton

Display 50 Records Page 1 of 1

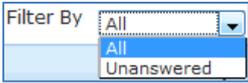
Copy Responses

- iii. Click on the **Copy Responses** button to copy the response for the question to a survey for another facility/supplier.
  - iv. The **Information** dialog box is displayed. Click on the **OK** button to continue.
  - v. To complete the process, click on the **Done** button.
11. To navigate in between KPI's use the **Previous KPI** and **Next KPI** links on the bottom right.
  12. Provides all answers to all applicable KPI's for suppliers/facilities selected.
  13. Click on the **Save and Continue** to save the entered responses and move to the next step.

14. The **Summary** tab is displayed which displays completion status of the survey at Supplier, Facility & KPI level.

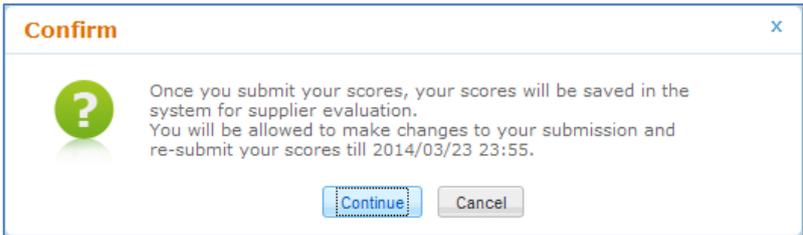


To filter the summary, use the **Filter By** dropdown box located on the top right of the **Summary** tab.



**Note:** Click on the number of Total Unanswered Questions/Mandatory Unanswered Questions to directly go to the unanswered question/mandatory unanswered question under the survey form tab.

15. Click **Submit Response** to submit the responses. The following message is displayed.

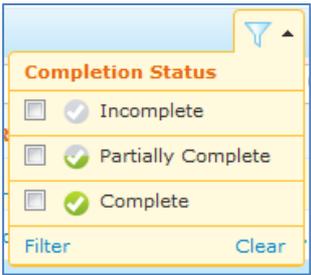


16. Click **Continue**. The scores are submitted, and the **Score Events** page is displayed.

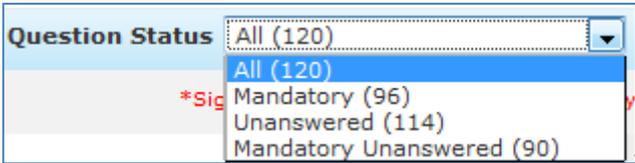
At any point in the survey, you can click on "**Exit**" button to exit the survey with following three options:

- **Yes:** Click on this option to save the entered data and then Exit the survey.
- **No:** Click on this option to not to save the entered data and Exit the survey.
- **Don't Exit:** This option will keep you on the same page.

To filter the KPI's in the Suppliers/Facilities module, click on the  icon, select the required option and click on the **Filter** link.



To filter questions according to their statuses, use the **Question Status** dropdown box on the top right side of the page under the **Survey From** tab.



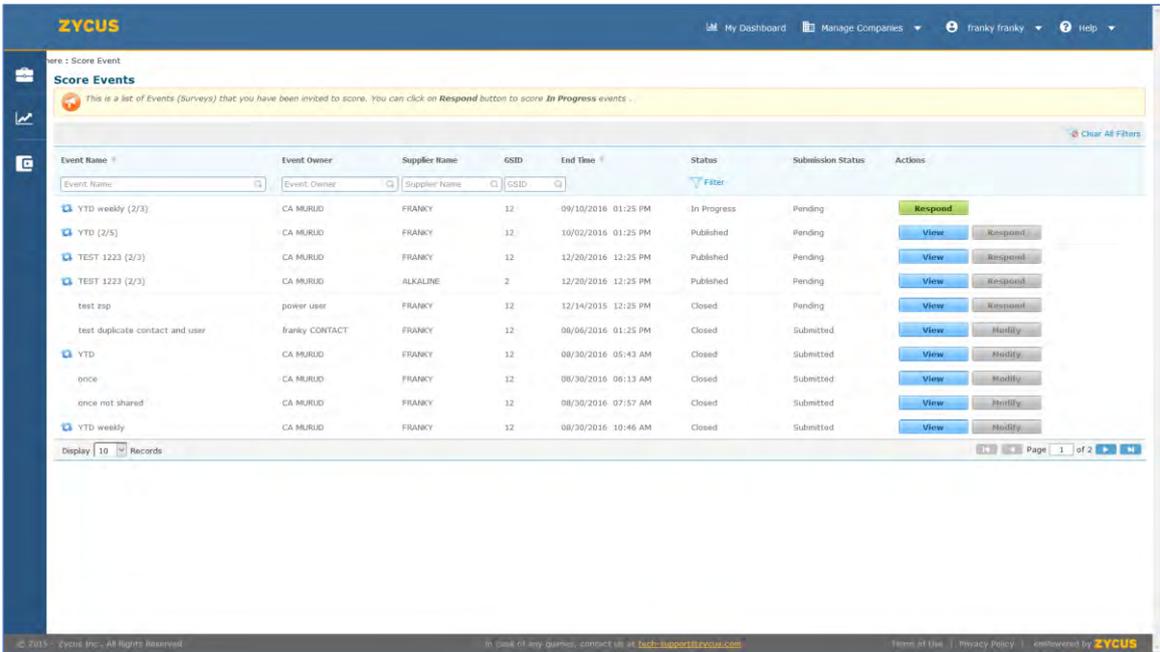
To know the completion status of the survey, use the **Mandatory Completion Status** dropdown box on the top right side of the page next to the progress bar.



**6.5.1.2 Scoring Events Offline**  
**To score an event offline:**

Follow the steps mentioned below to score the event offline by downloading the event template in excel format, scoring it offline and uploading it back into the system.

- 1. Once you click on the link from the email, the **Score Events** page is displayed:

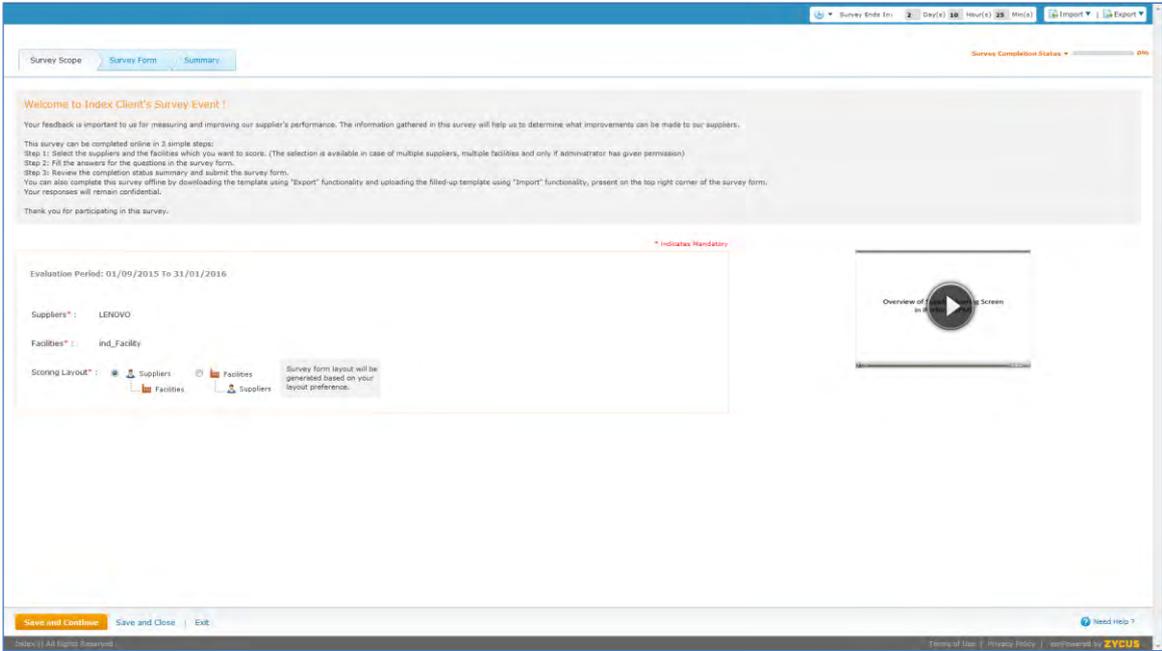


- 2. Search for the required event using the **Event Name** and/or the **Event Owner** search box.

Event Name ▾ Event Owner

Event Name   Event Owner

3. Click on the **Respond** button in the **Actions** column for the corresponding event to open the survey.
4. The survey page is displayed with the **Survey Scope** tab open.



5. Select any one of the following scoring layout as required:

Layout	Description
	Select the <b>Suppliers to Facilities</b> layout to score a supplier linked to multiple facilities.
	Select the <b>Facilities to Suppliers</b> layout to score multiple suppliers linked to a single facility.

6. Click on the **Export** button and select the type of survey form to be exported. The survey form contains the questionnaire template in an excel format. The exported template will contain prepopulated names of supplier, facilities, KPIs and the questions to be scored of the selected suppliers and facilities.



**Note:** In case there are more than 200 suppliers in an Event, users can score suppliers only through offline scoring.

**Note:** A **Custom Survey Form** is a transpose of a **Standard Survey Form** i.e. suppliers/facilities names are displayed in rows custom.

**Note:** If a **Custom Survey Form** is exported, fields need to be mapped manually when the custom survey form is uploaded into the system.

Export Type	Description																																							
Standard Survey Form	<p>In the <b>Standard Survey Form</b>, the questions are displayed in the rows and the Suppliers/Facilities names are displayed in the columns.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #e0e0e0;">A</th> <th style="background-color: #e0e0e0;">B</th> <th style="background-color: #e0e0e0;">C</th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0e0e0;">1</td> <td style="background-color: #e0e0e0;">Supplier Name</td> <td style="background-color: #e0e0e0;">Facility Name</td> </tr> <tr> <td></td> <td></td> <td style="background-color: #e0e0e0;">KPI-1_Q-1</td> </tr> <tr> <td>2</td> <td></td> <td>Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)</td> </tr> <tr> <td>3</td> <td>DUN RITE LAWN MAINTENANCE</td> <td>Castlefield</td> </tr> <tr> <td>4</td> <td>DUN RITE LAWN MAINTENANCE</td> <td>Alaska</td> </tr> <tr> <td>5</td> <td>DUN RITE LAWN MAINTENANCE</td> <td>Peterman</td> </tr> <tr> <td>6</td> <td>MONIT BROTHERS</td> <td>Castlefield</td> </tr> <tr> <td>7</td> <td>MONIT BROTHERS</td> <td>Alaska</td> </tr> <tr> <td>8</td> <td>MONIT BROTHERS</td> <td>Peterman</td> </tr> <tr> <td>9</td> <td>WALT'S IGA</td> <td>Castlefield</td> </tr> <tr> <td>10</td> <td>WALT'S IGA</td> <td>Alaska</td> </tr> <tr> <td>11</td> <td>WALT'S IGA</td> <td>Peterman</td> </tr> </tbody> </table>	A	B	C	1	Supplier Name	Facility Name			KPI-1_Q-1	2		Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)	3	DUN RITE LAWN MAINTENANCE	Castlefield	4	DUN RITE LAWN MAINTENANCE	Alaska	5	DUN RITE LAWN MAINTENANCE	Peterman	6	MONIT BROTHERS	Castlefield	7	MONIT BROTHERS	Alaska	8	MONIT BROTHERS	Peterman	9	WALT'S IGA	Castlefield	10	WALT'S IGA	Alaska	11	WALT'S IGA	Peterman
A	B	C																																						
1	Supplier Name	Facility Name																																						
		KPI-1_Q-1																																						
2		Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)																																						
3	DUN RITE LAWN MAINTENANCE	Castlefield																																						
4	DUN RITE LAWN MAINTENANCE	Alaska																																						
5	DUN RITE LAWN MAINTENANCE	Peterman																																						
6	MONIT BROTHERS	Castlefield																																						
7	MONIT BROTHERS	Alaska																																						
8	MONIT BROTHERS	Peterman																																						
9	WALT'S IGA	Castlefield																																						
10	WALT'S IGA	Alaska																																						
11	WALT'S IGA	Peterman																																						
Custom Survey Form	<p>In the <b>Custom Survey Form</b>, the Suppliers/Facilities names are displayed in the rows and the questions are displayed in the columns.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #e0e0e0;">A</th> <th style="background-color: #e0e0e0;">B</th> <th style="background-color: #e0e0e0;">C</th> <th style="background-color: #e0e0e0;">D</th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0e0e0;">1</td> <td style="background-color: #e0e0e0;">Supplier Name</td> <td style="background-color: #e0e0e0;">Questions</td> <td style="background-color: #e0e0e0;">DUN RITE LAWN MAINTENANCE</td> </tr> <tr> <td style="background-color: #e0e0e0;">2</td> <td style="background-color: #e0e0e0;">Facility Name</td> <td style="background-color: #e0e0e0;">Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)</td> <td style="background-color: #e0e0e0;">DUN RITE LAWN MAINTENANCE Castlefield</td> </tr> <tr> <td style="background-color: #e0e0e0;">3</td> <td style="background-color: #e0e0e0;">KPI-1_Q-1</td> <td style="background-color: #e0e0e0;">What is the company's projected turnover this year? (Text)</td> <td></td> </tr> <tr> <td style="background-color: #e0e0e0;">4</td> <td style="background-color: #e0e0e0;">KPI-1_Q-2</td> <td></td> <td></td> </tr> </tbody> </table>	A	B	C	D	1	Supplier Name	Questions	DUN RITE LAWN MAINTENANCE	2	Facility Name	Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)	DUN RITE LAWN MAINTENANCE Castlefield	3	KPI-1_Q-1	What is the company's projected turnover this year? (Text)		4	KPI-1_Q-2																					
A	B	C	D																																					
1	Supplier Name	Questions	DUN RITE LAWN MAINTENANCE																																					
2	Facility Name	Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: (Text)	DUN RITE LAWN MAINTENANCE Castlefield																																					
3	KPI-1_Q-1	What is the company's projected turnover this year? (Text)																																						
4	KPI-1_Q-2																																							

7. User can fill the responses for each question in the corresponding column, for each supplier-facility combination, as shown in the above image.

**Note:** The exported template is user specific, i.e. the template would contain only those KPI's to which the user is invited.

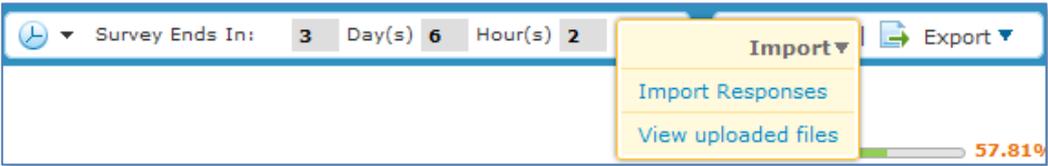
**Note:** The “Responses” worksheet is password protected.

**Note:** The “Instructions” worksheet contains guidelines to help the user to fill the template. This worksheet also contains the password to access “Responses” worksheet.

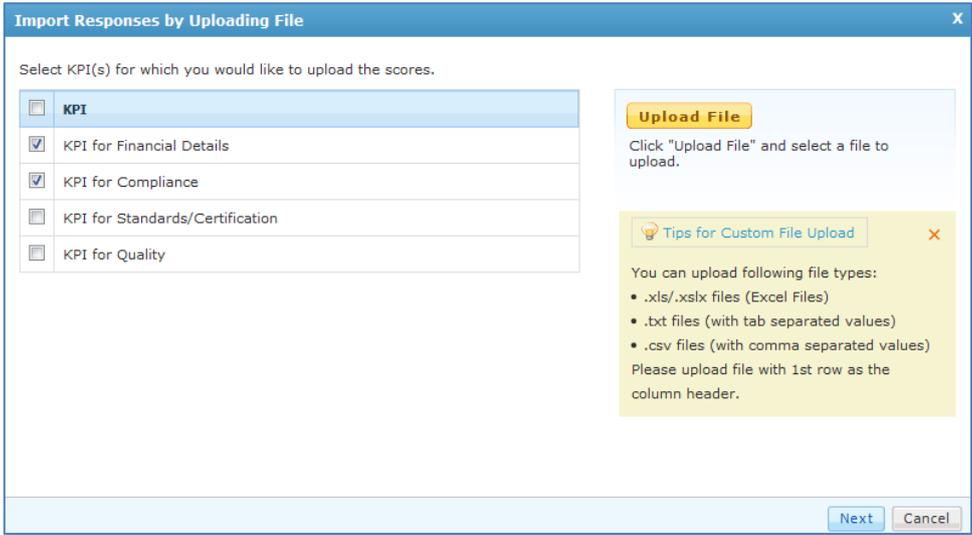
**Note:** User can add or delete a row/s from the worksheet by unprotecting it using the password specified in the **Instructions** sheet.

**Note:** Data validation rules as well as comments are incorporated in the fields wherever required.

8. Once you have filled in the responses into the exported template, click on the **Import** button and select **Import Responses** to import this template back into the system. The **Upload Scores** dialog box is displayed.



9. Select the KPIs for which scores are to be uploaded and then click **Upload File**.



10. The **File Upload** dialog box is displayed. Browse and select the required file.

11. Once the file is uploaded, click on the **Next** button to continue.

12. The **Upload Scores** dialog box is displayed.

**Note:** The size limit set for scoring file to be uploaded for auto scoring is 25 mb.

Import Responses by Uploading File

Uploaded File: Supplier\_Performance\_for\_\_Questionnaire\_2014-03-21\_17.03.xlsx

Map the below fields to their respective columns in file and then click Import Scores.

**Value**

▼ **Suppliers & Facilities** 2 of 2 fields mapped

Supplier  
Supplier Name

Facility  
Facility Name

▼ **KPI : KPI for Financial Details** 6 of 6 fields mapped ✓

Q1. Does the business operate as a Limited Liability, Partnership, Sole Trader, Incorporation, Other? Please specify: ( Text )  
KPI-1\_Q-1

Q2. What is the company's projected turnover this year? ( Text )

Import Scores Cancel

13. In this dialog box, the fields will get mapped automatically in the corresponding fields only if the uploaded file is the template exported from the application as mentioned in **Step 10**.

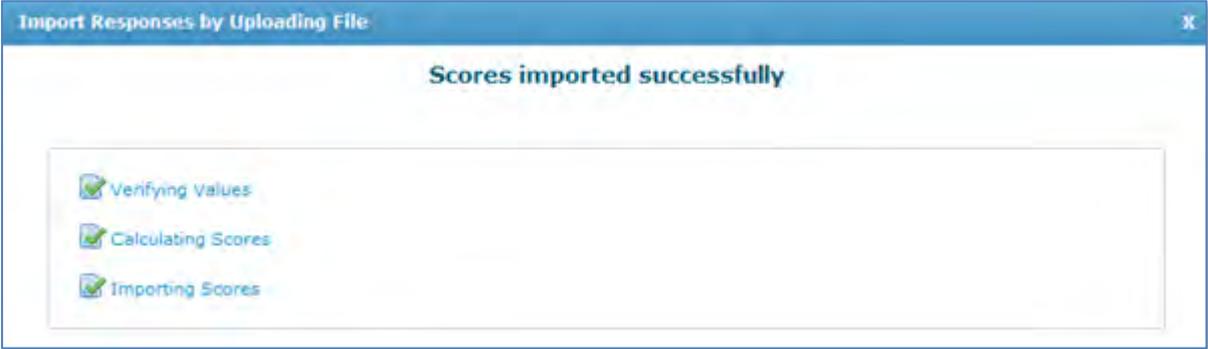
**Note:** The user can also upload score using any other customized template, but in that case the user has to manually map the fields in the template with the fields shown online.

**Note:** If no questions are mapped to any of the selected KPI then the following error message is displayed.

*"You need to map atleast one question to each of the selected KPI"*

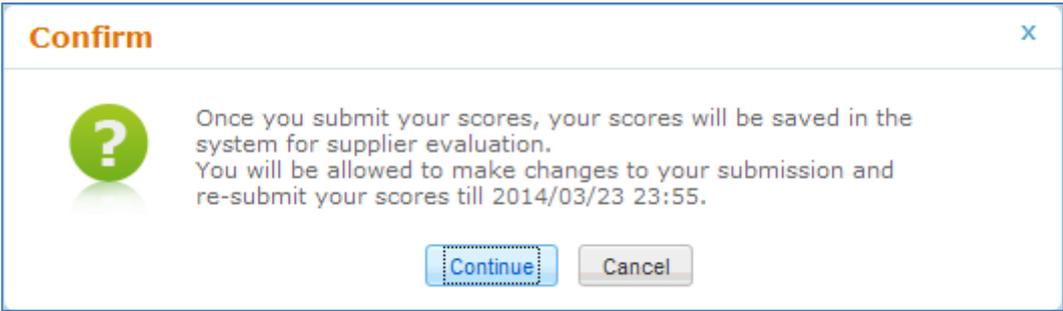
14. Click on the **Import Scores** button once all fields are mapped.

15. After successfully mapping all the fields, the **Scores imported successfully** dialog box is displayed. Click on the **Done** button to continue.



16. Click on the **Import** tab and select the **View uploaded files** link to view attachments, if any, uploaded for your reference.

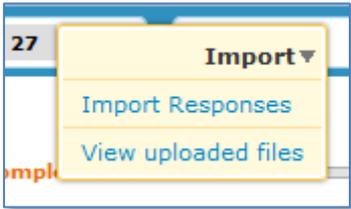
17. To submit the uploaded responses, click on the **Summary** tab. Click on the **Submit Responses** to submit the uploaded responses. The following message is displayed:



18. Click on the **Continue** button to submit the responses.

**6.5.1.3 View Uploaded Files**  
**To view the uploaded files:**

- 1. On the **Score Events** page, search and open the required survey.
- 2. Click on the **Import** button and select the **View uploaded files** option to view the uploaded survey forms.



- 3. The **View uploaded files** dialog box is displayed.

A screenshot of a dialog box titled 'View uploaded files'. It contains a table with the following data:

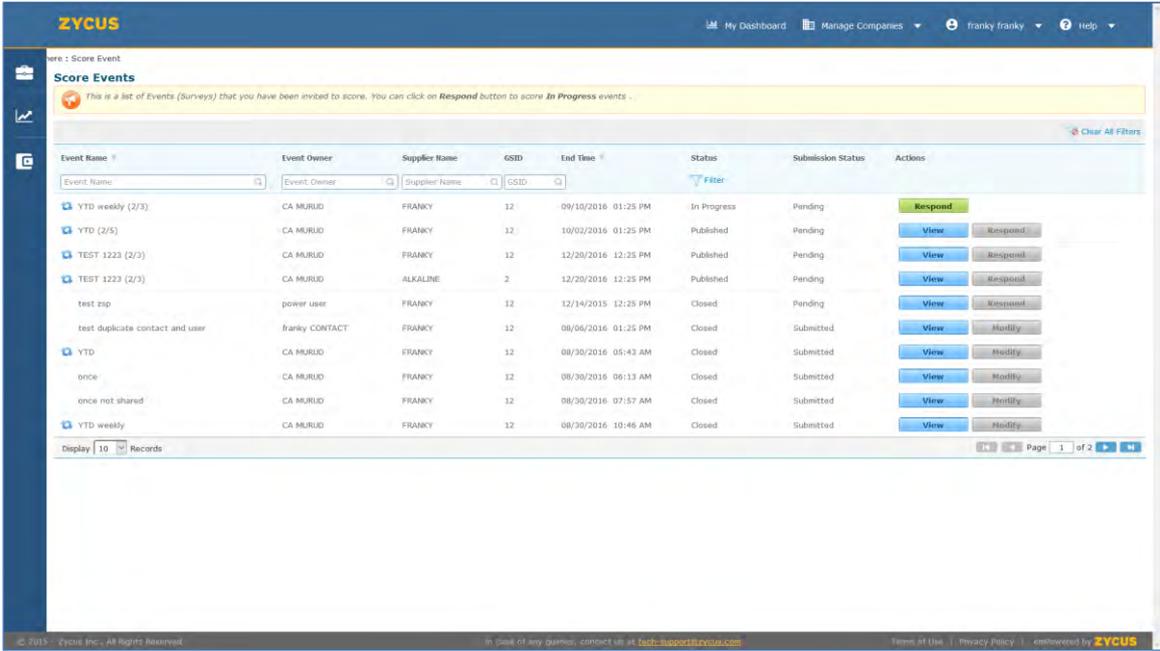
KPI Name	File Name	Size	Uploaded On	Action
KPI for Compliance	Supplier_Performance_for__Q uestionnaire_2014-03-22_17. 00.xlsx	10.8 KB	03/22/2014	Download
KPI for Financial Details	Supplier_Performance_for__Q uestionnaire_2014-03-22_17. 00.xlsx	10.8 KB	03/22/2014	Download
KPI for Quality	Supplier_Performance_for__Q uestionnaire_2014-03-22_17. 00.xlsx	10.8 KB	03/22/2014	Download
KPI for Standards/Certification	Supplier_Performance_for__Q uestionnaire_2014-03-22_17. 00.xlsx	10.8 KB	03/22/2014	Download

**6.5.1.4 Modify Responses**

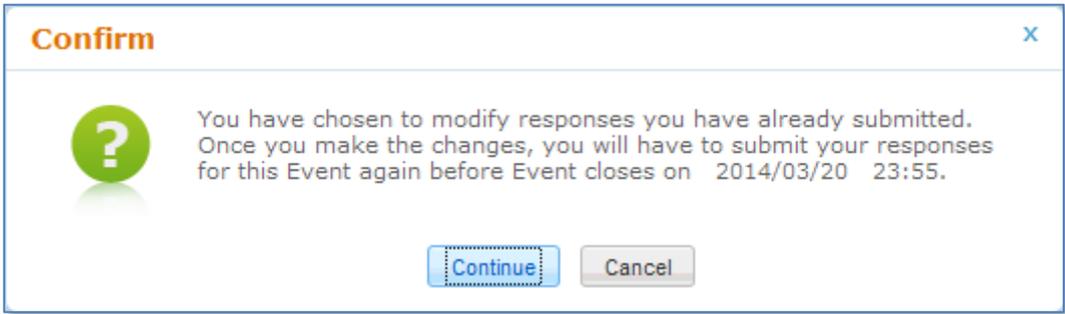
Once you have submitted your responses for an event, you will have the option to modify your responses for that event until that event gets closed.

**To modify responses:**

On the **Score Events** page, for an event having **Status** as **In Progress** and **Submission Status** as **Submitted**, you will get the option



1. Click  to edit and resubmit the responses for a corresponding event. The following message is displayed.



2. Click on the **Continue** button to continue with the modification.

**Note:** The Event Scorers will be able to make changes to their submission and re-submit in case they feel there were any errors in their answers or if they missed out on filling certain details. Resubmission can be done any number of times till the event closes. Once the submission is re-called, it should be submitted again before the event closes for the scores to be counted.

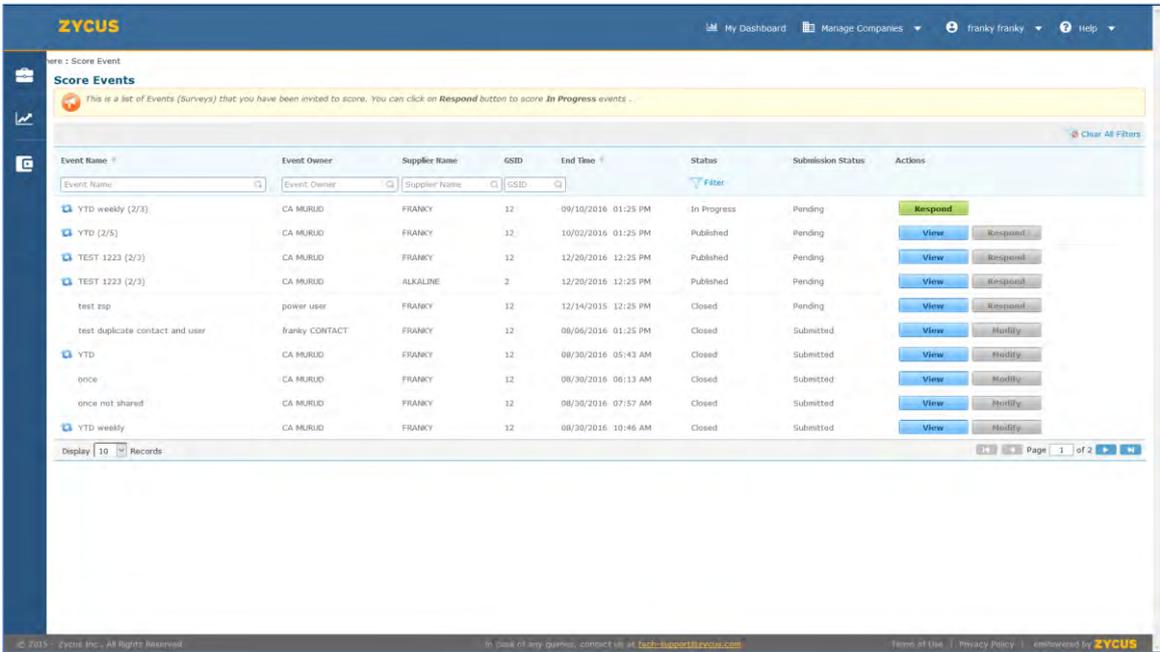
3. Follow the standard process of filling the survey and make the required changes. To resubmit the modified responses, open the **Summary** tab and click on the **Submit Responses** button.

**6.5.1.5 Delegate a Scoring Event**

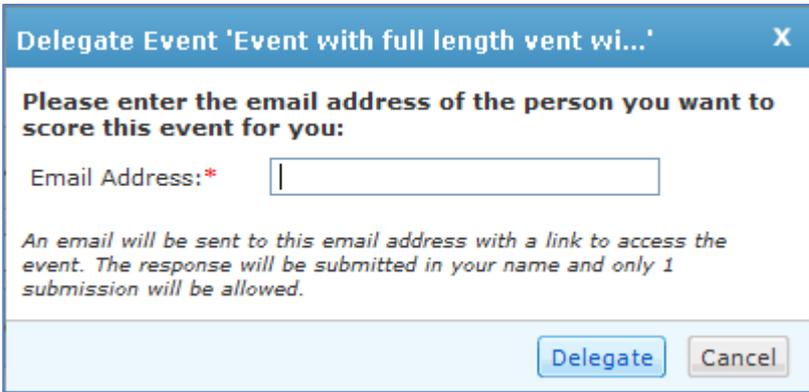
A scorer has the option to delegate a scoring event to some other user in case if the scorer wants that user to score on behalf of him.

**To delegate a scoring event:**

On the **Score Events** page, for an event having **Status** as **In Progress** and **Submission Status** as **Pending**, you will get the option 



1. For a corresponding event, click **Delegate**  to forward the invite to other user to score. The following dialog box is displayed.



2. Enter the email address of the person you want to score this event on behalf of you.
3. Click **Delegate**. An email will be sent to the delegated user.

**Note:** The score from a particular user or on a particular user's behalf will be accepted only once.

## 6.5.2 How to View Performance Reports?

Under **My Performance**, hover over **View Performance Reports**. A list of Customer Company will be provided. Select the customer company of your choice for which you want to view the performance reports. Following page will be displayed:

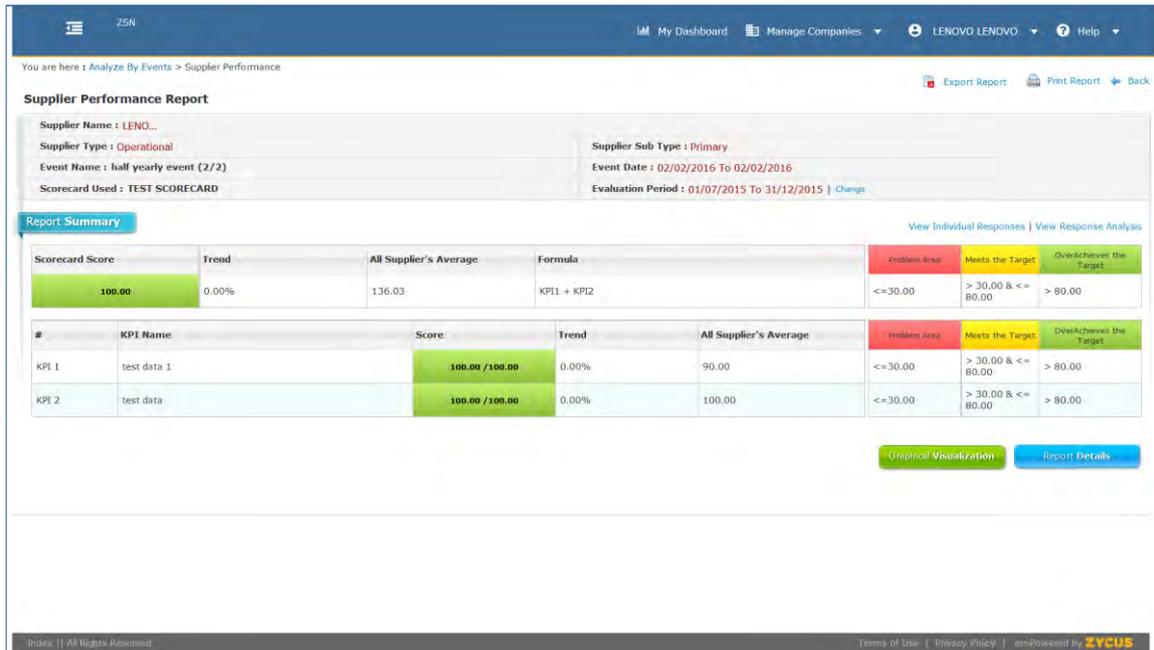
Event Name	Scorecard Name	Event Owner	Supplier Name	GSTD	Start Date	End Date	
<input type="checkbox"/> TEST 1223	MULTUSER	CA MURUD	ALKALINE	2	09/06/2016 06:20	09/06/2016 06:26	
<input type="checkbox"/> TEST 1229	MULTUSER	CA MURUD	FRANKY	12	09/06/2016 06:20	09/06/2016 06:26	
<input type="checkbox"/> YTD for multisupplier yearly	YTD for multisupplier	CA MURUD	FRANKY	12	08/31/2016 06:26	08/31/2016 06:32	
<input type="checkbox"/> NA ytd	ytd	CA MURUD	FRANKY	12	08/31/2016 02:31	08/31/2016 02:43	
<input type="checkbox"/> YTD weekly	ytd	CA MURUD	FRANKY	12	08/30/2016 10:40	08/30/2016 10:46	
<input type="checkbox"/> once	ytd	CA MURUD	FRANKY	12	08/30/2016 06:10	08/30/2016 06:13	
<input type="checkbox"/> YTD	ytd	CA MURUD	FRANKY	12	08/30/2016 05:30	08/30/2016 05:43	
<input type="checkbox"/> test_ra	r15.10.1.0-clone	CA MURUD	FRANKY	12	05/30/2016 06:36	05/30/2016 06:38	
<input type="checkbox"/> test_ra	r15.10.1.0-clone	CA MURUD	ALKALINE	2	05/30/2016 06:36	05/30/2016 06:38	
<input type="checkbox"/> franky-ra (5/5)	r15.10.1.0	power user	ALKALINE	2	03/21/2016 01:35	03/25/2016 12:25	

1. To compare performances for different events, select the events by checking the box against their name.
2. Once you complete selecting the events, click on **Compare Performance**.

**Note:** The suppliers can compare performances for up till 5 events.

**Note:** This page will only show all the published events.

3. Click to view the performance of the respective supplier. The **Supplier Performance Report** page is displayed.



4. Click **Export Report** to export the performance report for an event. The performance report will be exported to PDF.
5. Click **Print Report** to print the performance report for a supplier or all suppliers in an event.
6. Click **Change** to change the Event or the performance evaluation period.



7. Click **Report Details** to view the score details of each KPI.

**Report Summary** [View Individual Responses](#) | [View Response Analysis](#)

Scorecard Score	Trend	All Supplier's Average	Formula	Problem Area	Meets the Target	Overachieves the Target
NA	NA	53.32	KPI1 + KPI2 + KPI3 + KPI4	<=20.00	> 20.00 & <= 40.00	> 40.00

#	KPI Name	Score	Trend	All Supplier's Average	Problem Area	Meets the Target	Overachieves the Target
KPI 1	Cloned French KPI	NA /110.00	NA	33.00	<=30.00	> 30.00 & <= 60.00	> 60.00
KPI 2	French KPI	NA /110.00	NA	110.00	<=30.00	> 30.00 & <= 60.00	> 60.00
KPI 3	Italian KPI	NA /100.00	NA	NA	<=30.00	> 30.00 & <= 40.00	> 40.00
KPI 4	KPI Issue	NA /100.00	NA	NA	<=20.00	> 20.00 & <= 50.00	> 50.00

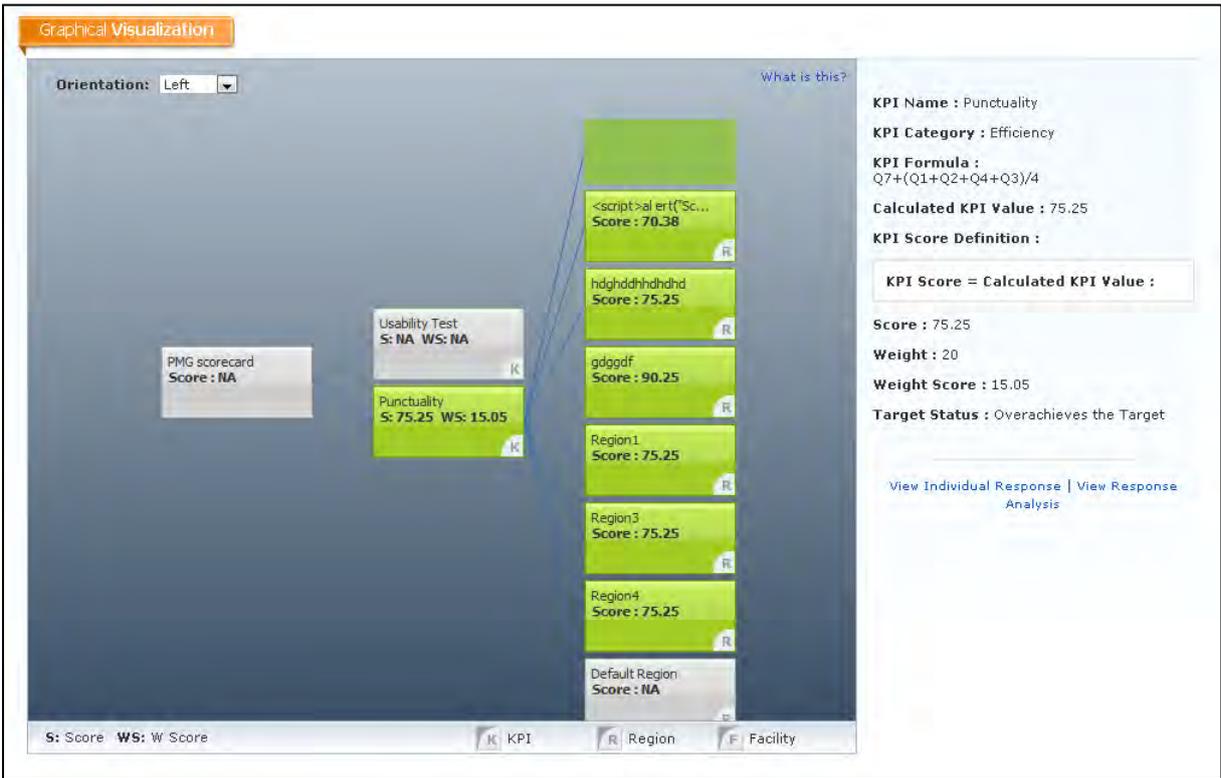
© 2015 - Zycus Inc., All Rights Reserved. In case of any queries, contact us at [tech-support@zycus.com](mailto:tech-support@zycus.com)

8. The report details page will open:

**Report Details**

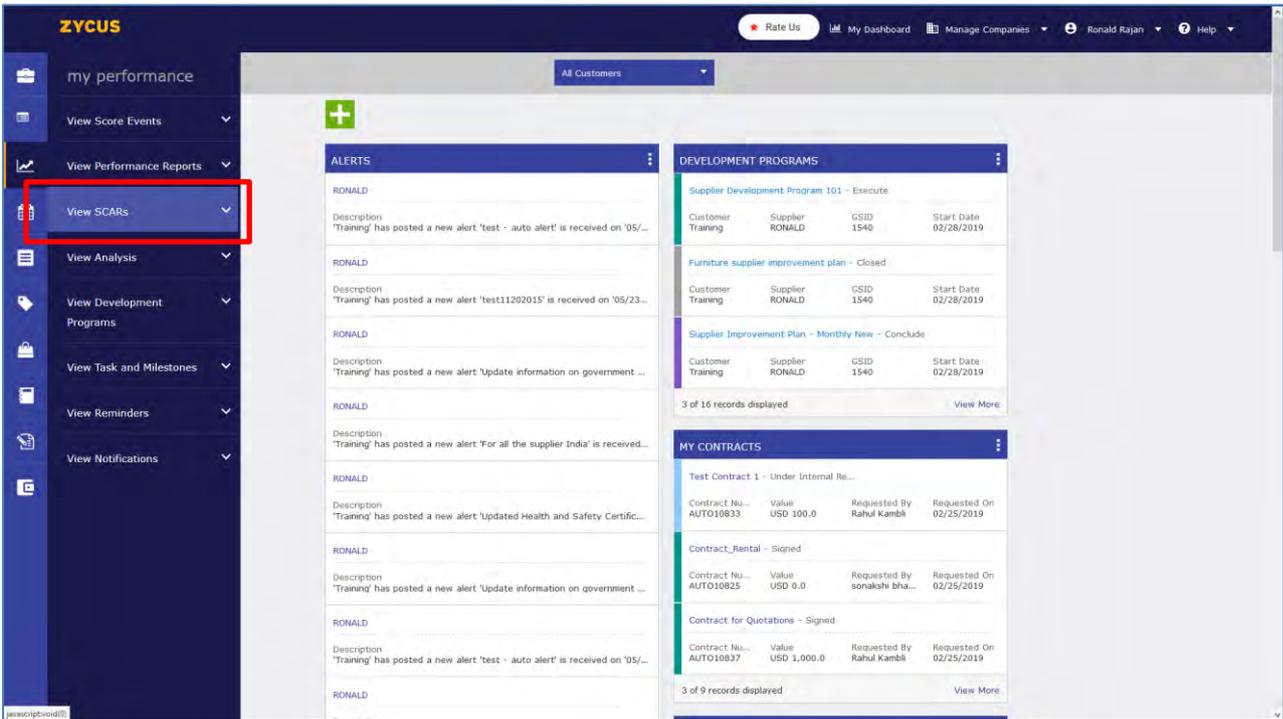
KPI1 Punctuality		Weight: 20.0 %	Score: 85.56	W Score: 17.11
#	Question	Total Question Value Calculated as	Total Question Value	<b>KPI Formula</b> $Q7 + (Q1+Q2+Q4+Q3)/4$ <b>Calculated KPI Value:</b> 85.56 <b>KPI Score Definition:</b> KPI Score = Calculated KPI Value <b>KPI Score:</b> 85.56 <a href="#">View Individual Response</a>   <a href="#">View Response Analysis</a>
Q 1	What is the average deviation of the employee reporting for job per month	average	8.25	
Q 2	Is the employee able to complete his task on time	average	0.00	
Q 3	Has the employee taken irregular leaves in past 6 months	average	0.00	
Q 4	Number of disciplinary issues filed on the employee in last 6 months	average	11.00	
Q 7	Over all likeliness of the employee to change his/her behaviour in terms of punctuality after training programme	average	80.75	

9. Click **Graphic Visualization** to view an interactive data visualization tool that allows you to view the three dimensions - KPI, Facility and Region in a pictorial form.

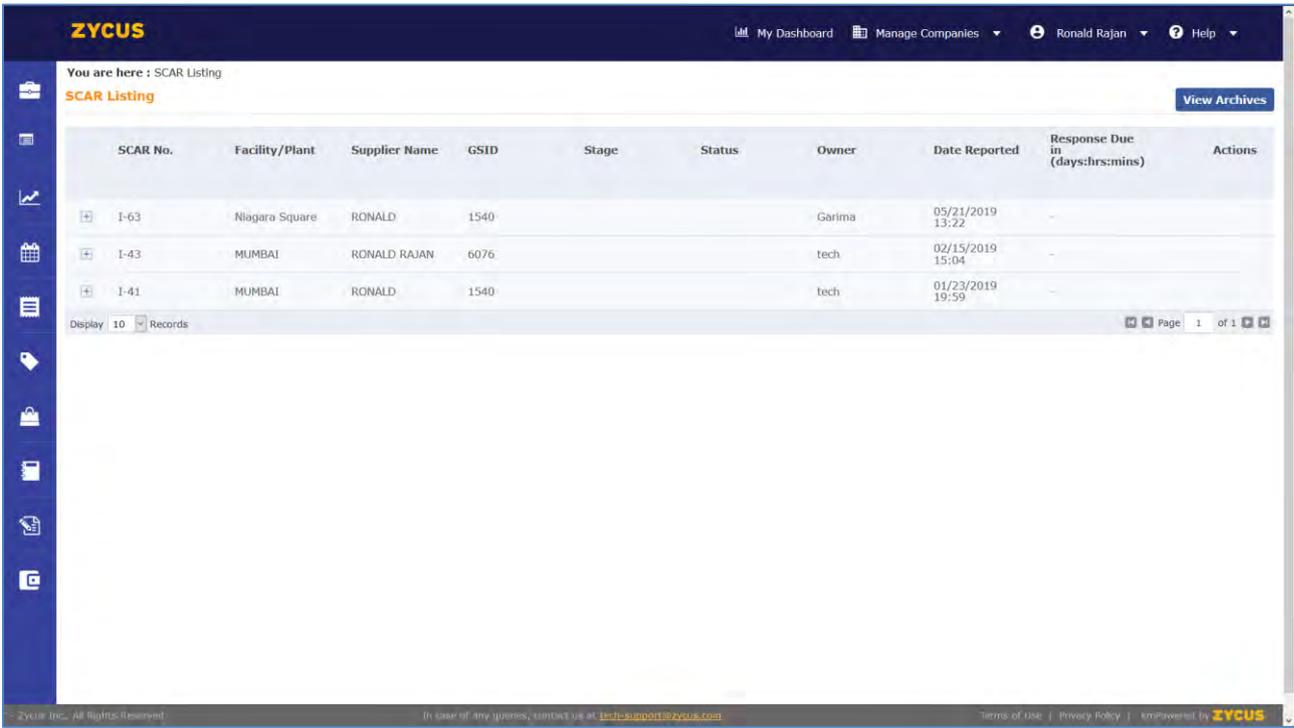


### 6.5.3 How to view SCARs

Under **My Performance**, hover over **VIEW SCARS**. A list of Customer Company will be provided. Select the customer company of your choice for which you want to view the **SCAR** programs. Following page will be displayed:

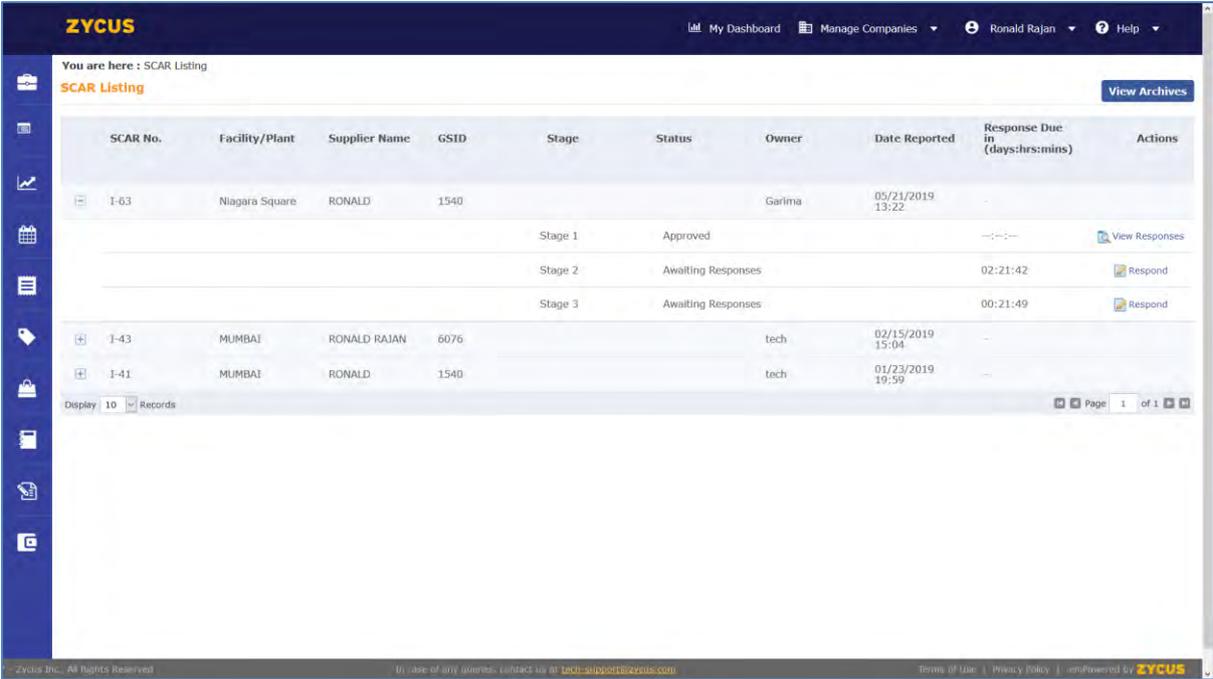


6.5.3.1 SCAR Listing page

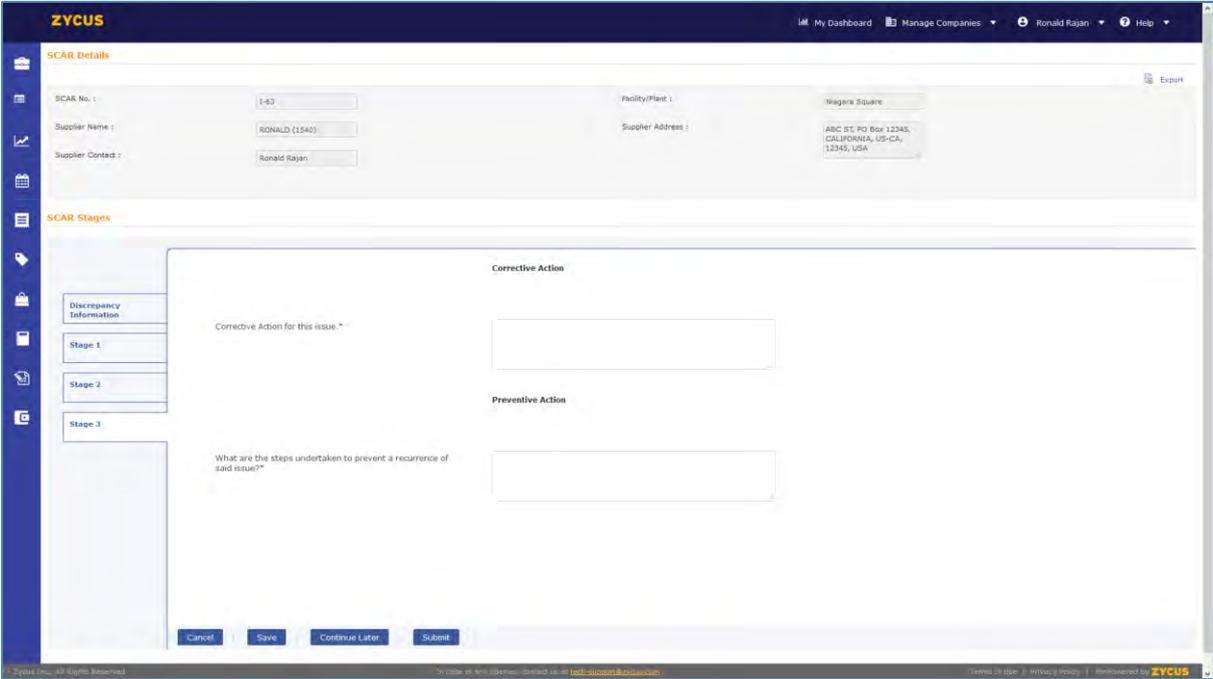


1. The SCAR listing page displays a list of corrective requests from the buyers to the suppliers.
2. The suppliers must respond to the corrective requests within a designated time (as per the date mentioned under the tab **Response Due**).

- 3. Click on the SCAR which needs to be responded, the selected SCAR will display the number of stages present, and the status of the response for each Stage of the SCAR.



- 4. Click on **Respond** under the **Actions** tab.
- 5. The SCAR page will open on the same stage where the response is required by the supplier.
- 6. The questions listed for that stage will have to be filled.

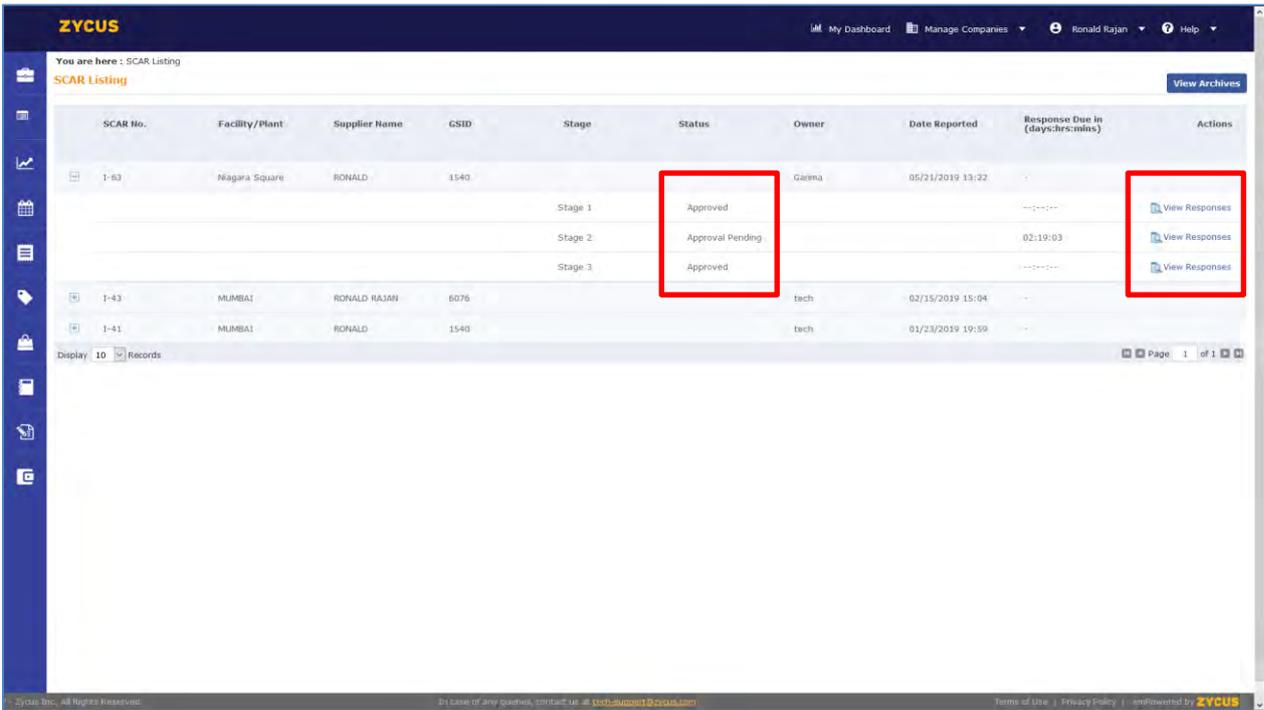


- 7. Once all the responses are given, click on **Submit**. The following pop-up will occur once the supplier hits the **Submit** button.

8. Once the responses are submitted, the supplier will not be able to edit the responses.
9. If the SCAR responses are not filled within the designated time given by the Buyer, the Supplier will view the **Overdue** status under **Response Due** in the listing page. Please refer the following figure.

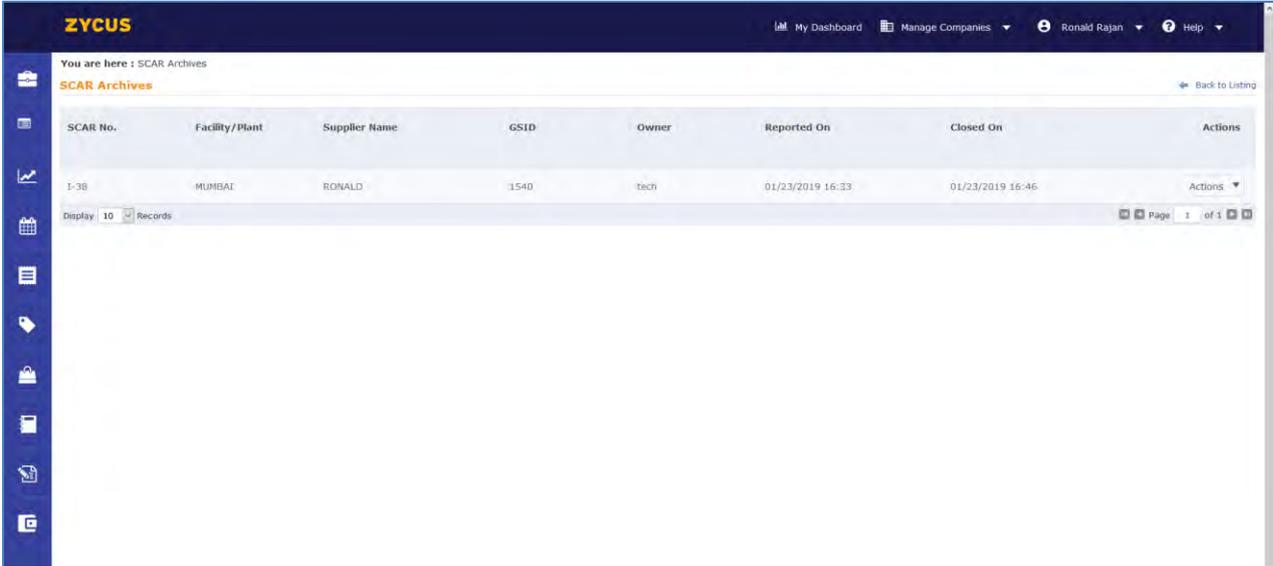
SCAR No.	Facility/Plant	Supplier Name	GSID	Stage	Status	Owner	Date Reported	Response Due in (days:hrs:mins)	Actions
I-43	MUMBAI	RONALD RAJAN	E076	acknowledge	Approval Pending	Tech	02/15/2019 15:05	Overdue 93:05:12	View Responses
I-41	MUMBAI	RONALD	1540	solution	Approved	Tech	01/23/2019 19:05	Overdue ---:---:---	View Responses

10. Once the responses are submitted by the Supplier, the same responses can be Accepted or Rejected by the Buyer who has raised the SCAR request to the supplier.
11. The accept/reject of each stage response will be visible to the supplier, under the **Status** tab for each SCAR in the listing page.
12. Supplier will also be able to view all the responses with the help of the **View Responses** button.



6.5.3.2 SCAR Archives

1. All the SCARs which has been assigned to the Supplier (SCARs which has been responded and closed) are listed in this page.



2. The SCAR Number, Facility/Plant, Supplier Name, GSID, Owner, SCAR Reported On date and Closed On date and Actions for each of the SCARs will be visible in the listing page.
3. Supplier can view responses for each of the SCAR issues by clicking **View Responses**, under the Actions tab.
4. Suppliers can also Export all the responses for the SCAR with the help of **Export** under the **Actions** tab.

SCAR No.	Facility/Plant	Supplier Name	GSID	Owner	Reported On	Closed On	Actions
T-38	MUMBAI	RONALD	1540	tech	01/23/2019 16:33	01/23/2019 16:46	<ul style="list-style-type: none"> <li>View Responses</li> <li>Export</li> </ul>

### 6.5.4 How to View Trend Analysis?

Under **My Performance**, hover over **Trend Analysis**. A list of Customer Company will be provided. Select the customer company of your choice for which you want to view the development programs. Following page will be displayed:

Supplier Name	GSID	Scorecard Name	Performance As On	Score	Reports
SONY	6				Analyze
Primates	6	scorecard for download responses	10/31/2015	11.40	
		scorecard @ R15.10.1.0	10/31/2015	21.30	
		verification for comma	11/30/2015	100.00	
		Mandatory questions	01/31/2016	15.72	
		Anuj	05/31/2016	51.25	

The Trend Dashboard is a heat map which displays graphical representation of data where the individual values are contained in a matrix and are represented as colours. The heat map will give you a quick overview of scorecards, trend report and KPI level scores for each supplier.

**6.5.4.1 Linked Suppliers**

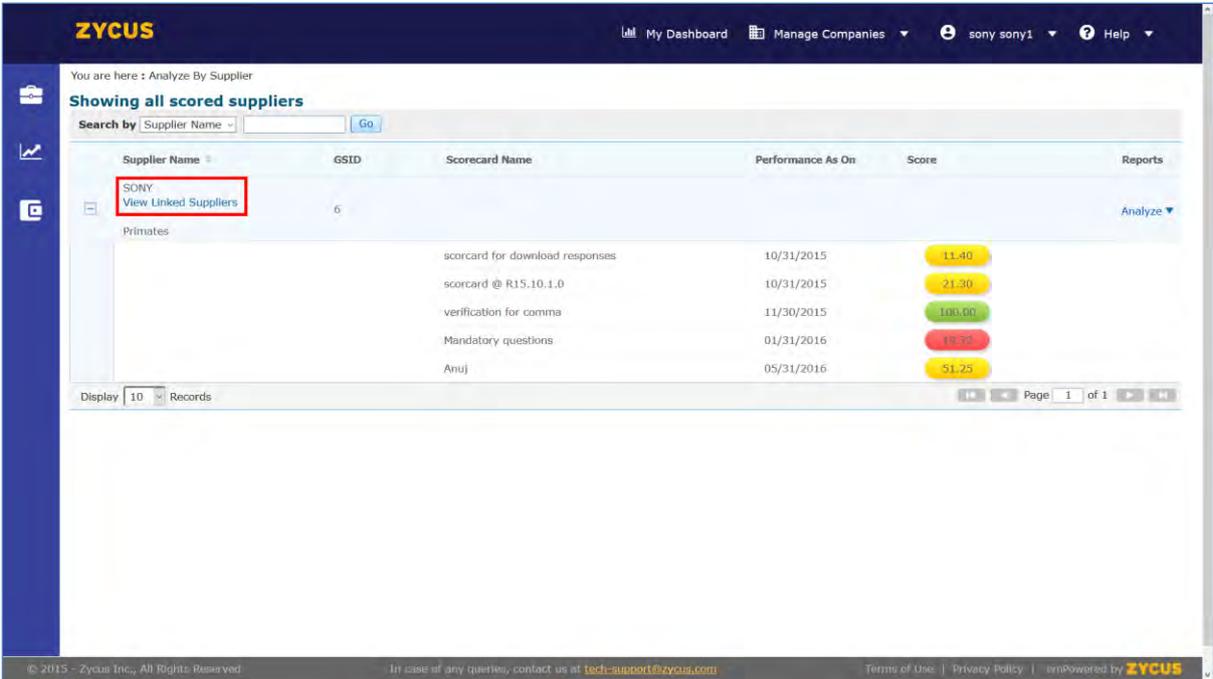
iPerform’s provides you with the ability to view the event-specific KPI scores (Hierarchical Score) for a Parent and Child Supplier.

Here you can view scores for a Parent Supplier along with some or all of its Child Suppliers.

The parent-child relationship is referred from iSupplier. The definitions of a Parent Supplier and Child Supplier remain the same as defined in iSupplier.

The Parent may or may not be a participant of the event for which the Hierarchical Score was being calculated.

- 1. To view linked suppliers to one particular supplier, click **View Linked Supplier** (highlighted in the image below).



- 2. A popup will appear which will show all the suppliers linked to the selected supplier.

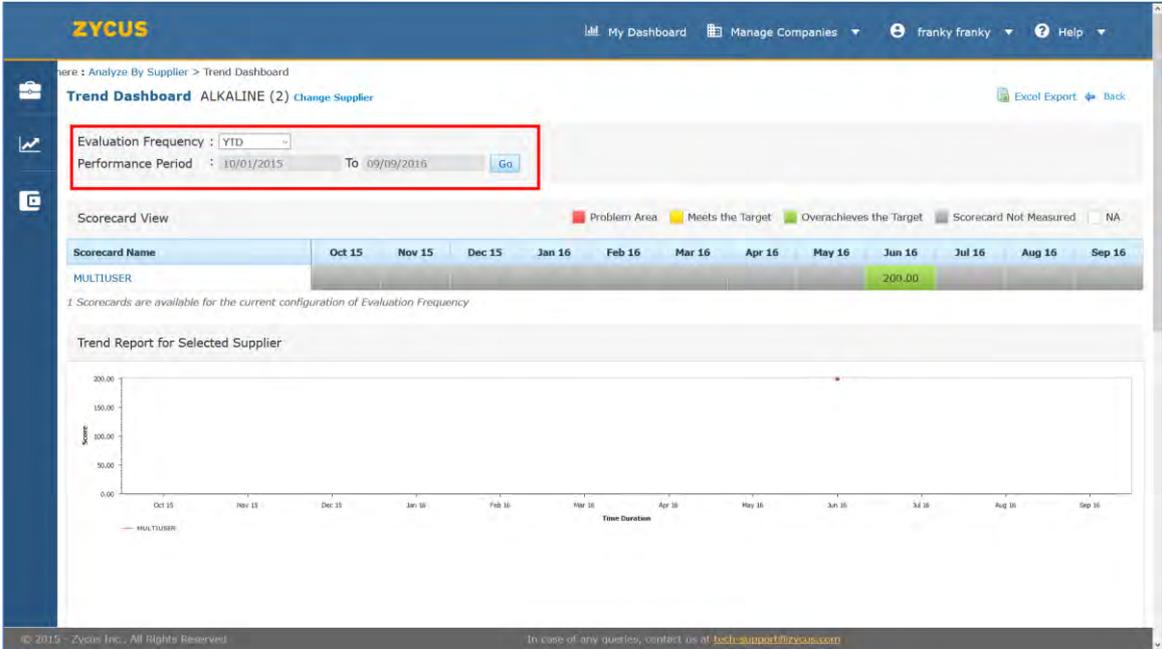
Supplier Name	GSID	Supplier Sub Type	Number of Primary Child Supplier(s)
<b>SONY</b>	0	Primary	4
WARRIER	3	Primary	
TOMCAT	4	Primary	
APPLE	4	DBA	
DELL	4	DBA	
TOSHIBA	12	Primary	
MOTOROLA	12	DBA	
MICROMAX	33	Primary	

3. This popup will display the complete hierarchy of all the child suppliers of the selected supplier, and the parent of the selected supplier (if any).

**6.5.4.2 Trend Dashboard**

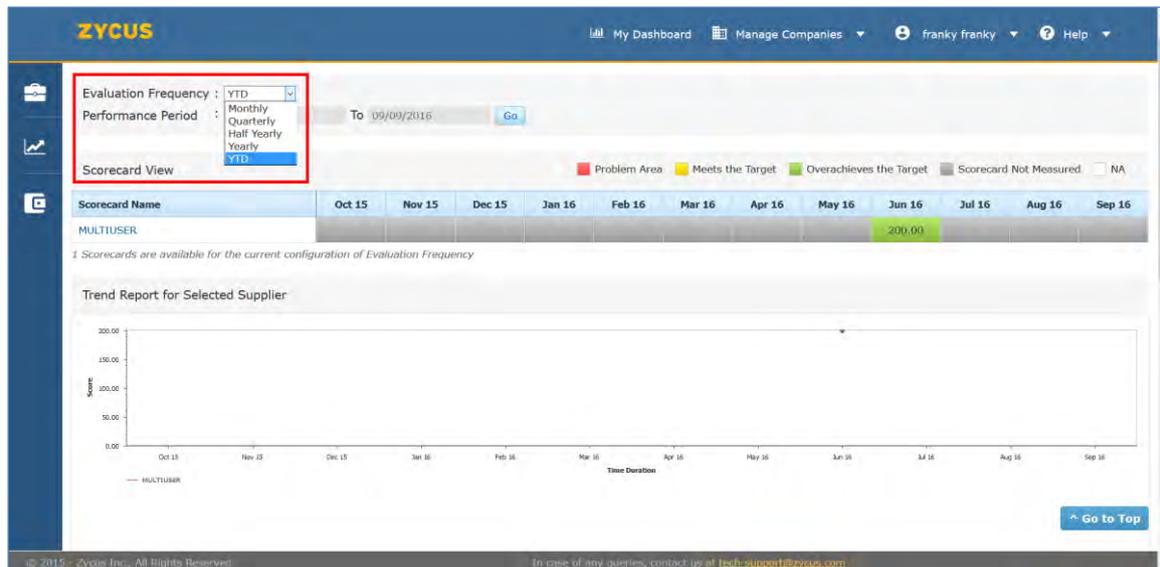
**Year to Date (YTD)**

1. For a given supplier, under the **Reports** column, click **Analyze > Trend Dashboard**, you will be navigated to the following page:



**NOTE:** You can use the **Change Supplier** link to view the **Trend Dashboard** for your other supplier profile.

- You can select the evaluation frequency from the drop-down list which offers options such as **Monthly, Quarterly, Half Yearly, Yearly and YTD**.



**NOTE:** For YTD option, the start date will be configured by your buyer and the end date will be today's date.

### Scorecard View

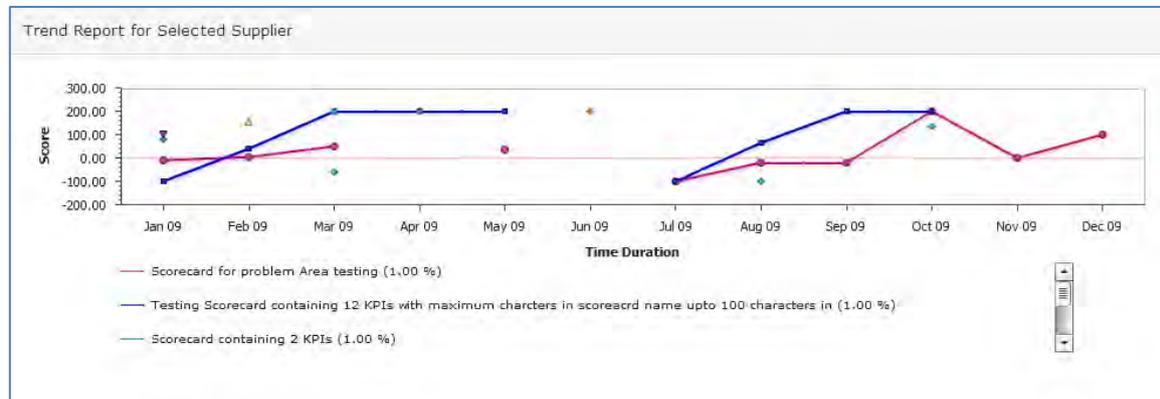
The "Scorecard View" section on this page represents data in Tabular manner with color coding. This scorecard view consists of Monthly scorecard represented by value and/or color.

Scorecard View		<span style="color:red">■</span> Problem Area <span style="color:yellow">■</span> Meets the Target <span style="color:green">■</span> Overachieves the Target <span style="background-color:gray">■</span> Scorecard Not Measured <input type="checkbox"/> NA										
Scorecard Name	Weight (%)	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09
Scorecard for problem Ar...	1.00	-10.00	4.00	50.00		35.00	NA	-100.00	-20.00	-20.00	200.00	0.00
Testing Scorecard contain...	1.00	-100.00	39.70	200.00	200.00	200.00	NA	-100.00	65.10	200.00	200.00	
Scorecard containing 2 K...	1.00	80.00		-60.00					-100.00		135.00	
*Slp@e#c\$ia% ^~c*h(a)...	0.00						200.00					
Scorecard containing 4 kpis	1.00				200.00							
Scorecard with 3 KPIs	1.00			200.00								
Scorecard for 2 kpis	1.00		156.00									
·~ <>/@#\$\$%^&*()_+~...	0.00	100.00										

3 Scorecards are available for the current configuration of Evaluation Frequency

## Trend Report for Selected Supplier

Below the scorecard section we have "Trend Report for Selected Supplier" section which displays the monthly trends of the supplier based on Scorecard mentioned in "Scorecard View" section.



## KPI View

Below the "Trend Report for Selected Supplier" section, there is a section named "KPI View". In this section user will be able to view scores at KPI level for each scorecard. All the scorecards mentioned in scorecard section will be featured under KPI view.

Under each scorecard user will have all the KPIs information associated with corresponding scorecard. The KPI view is similar to Scorecard view in following manner:

- Same colour coding
- Same tabular fashion data representation
- Same month-wise data distribution.

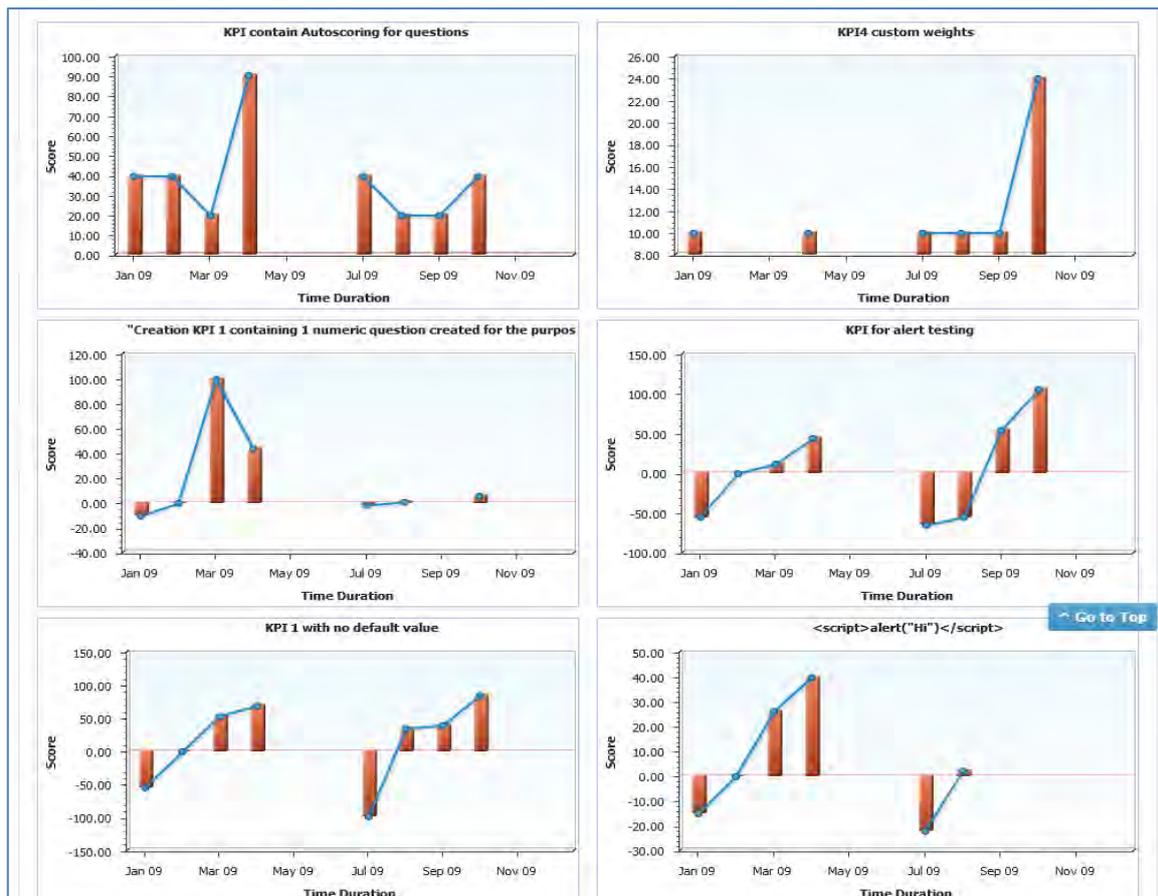
KPI View

Testing Scorecard containing 12 KPIs with maximum characters in scorecard name upto 100 characters in (1.00 %)

KPI Name	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09	Jul 09	Aug 09	Sep 09	Oct 09	Nov
Quality for Year 2012.	-88.00	0.00	44.00	33.00	NA	NA	-88.00	6.00	54.00	12.00	
KPI 1 with no default value	-55.00	0.00	53.17	69.20	NA	NA	-98.00	34.60	39.56	84.67	
KPI for alert testing	-55.00	0.00	12.00	44.50	NA	NA	-65.00	-55.00	54.50	106.00	
KPI contain Autoscoring for questions	39.70	39.70	20.00	90.50	NA	NA	39.70	20.00	20.00	39.70	
KPI5 custom	-78.00	0.00	21.00	43.00	NA	NA	-20.00	23.00	17.55	33.00	
"Sp@e#ç\$a%l^ ~c*h(a)r_a+c-t=e[r]s\` ...	-55.00	0.00	28.20	35.40	NA	NA	-11.00	3.30	47.25	31.33	
<script>alert("Hi")</script>	-15.00	0.00	26.00	39.80	NA	NA	-22.00	2.20	NA	NA	
KPI4 custom weights	10.00	NA	NA	10.00	NA	NA	10.00	10.00	10.00	24.00	
KPI3 average	-6.00	0.00	3.67	15.00	NA	NA	-19.00	7.00	6.33	-29.67	
KPI1 sum weights	-88.00	0.00	6.67	17.00	NA	NA	-44.49	5.00	18.33	31.00	
"Creation KPI 1 containing 1 numeric ques...	-10.00	0.00	100.00	44.00	NA	NA	-1.50	1.00	NA	5.00	
KPI2 sum	-44.00	0.00	60.00	27.00	NA	NA	-19.00	8.00	18.00	11.00	

[Go to Top](#)

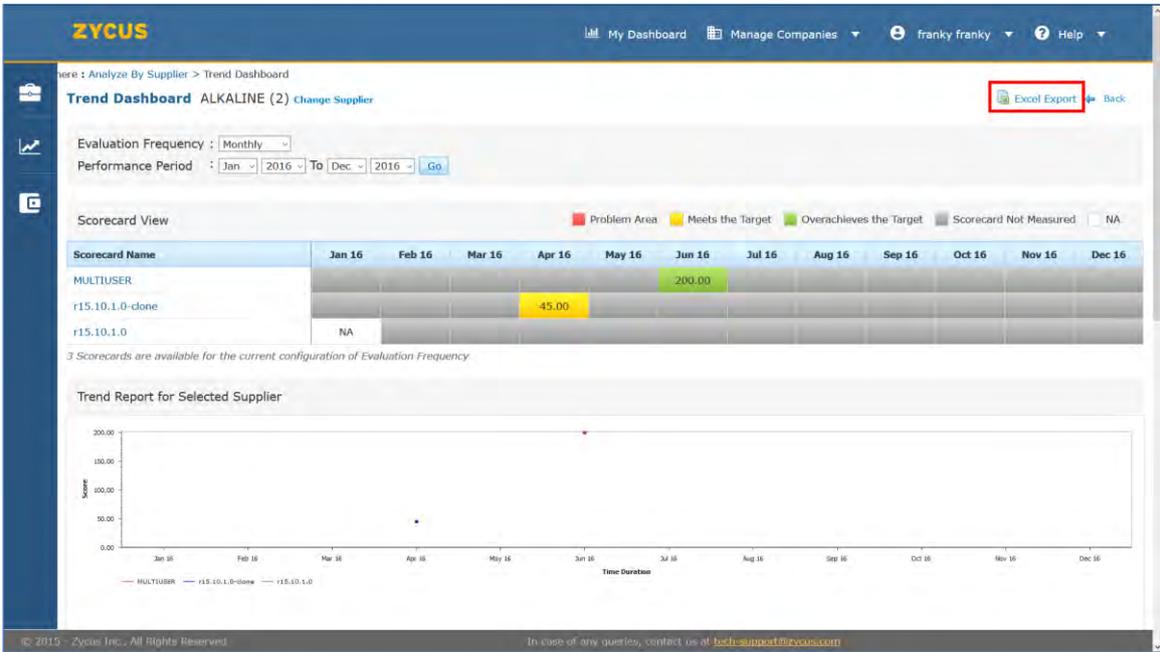
Below the "KPI View" section, you will get the graphs which represent the data mentioned in the KPI view section. The graphs in this section are generated based on the data present in "KPI View" section.



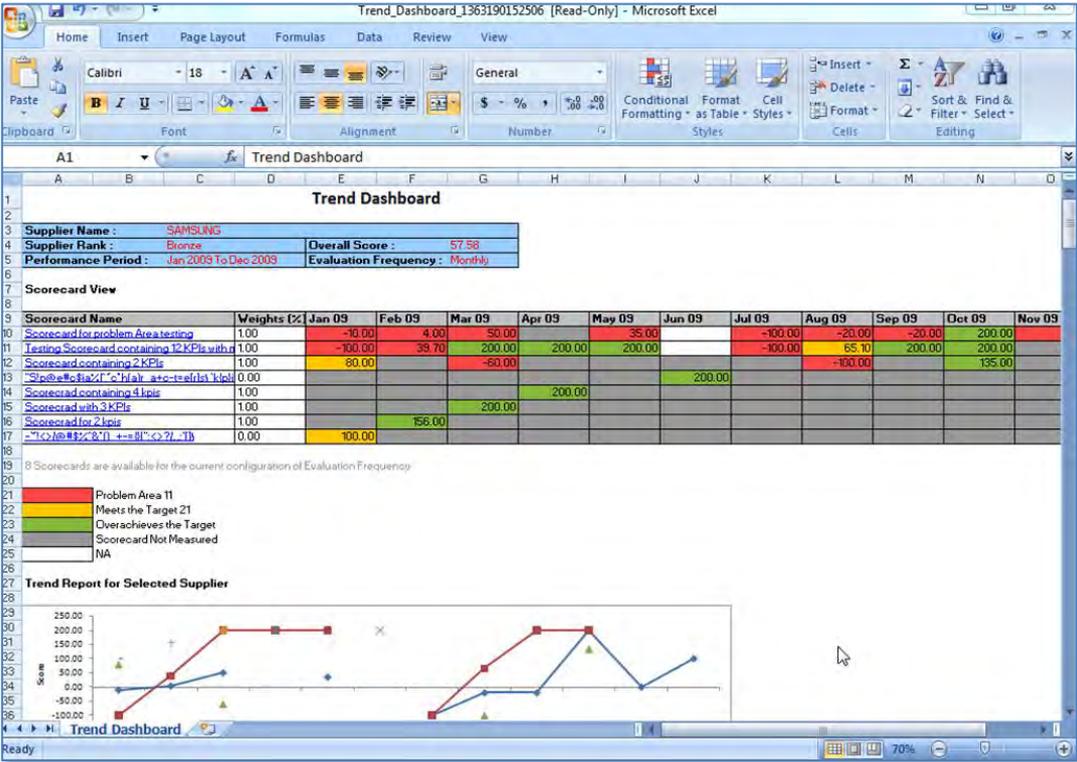
If page contains more than 12 scorecards and KPI's more than a limit, they will be loaded on demand/scroll.

### Excel Export

User will also get an option to export the Trend Dashboard in excel format. There is a button on the top right side of the page named "Excel Export" for the user to export the trend analysis report in excel.



The export data will be present in single worksheets. Worksheet will be named as "Trend Dashboard" and contain summary of the scorecards & KPI scores and their trend lines as shown in the attached excel.



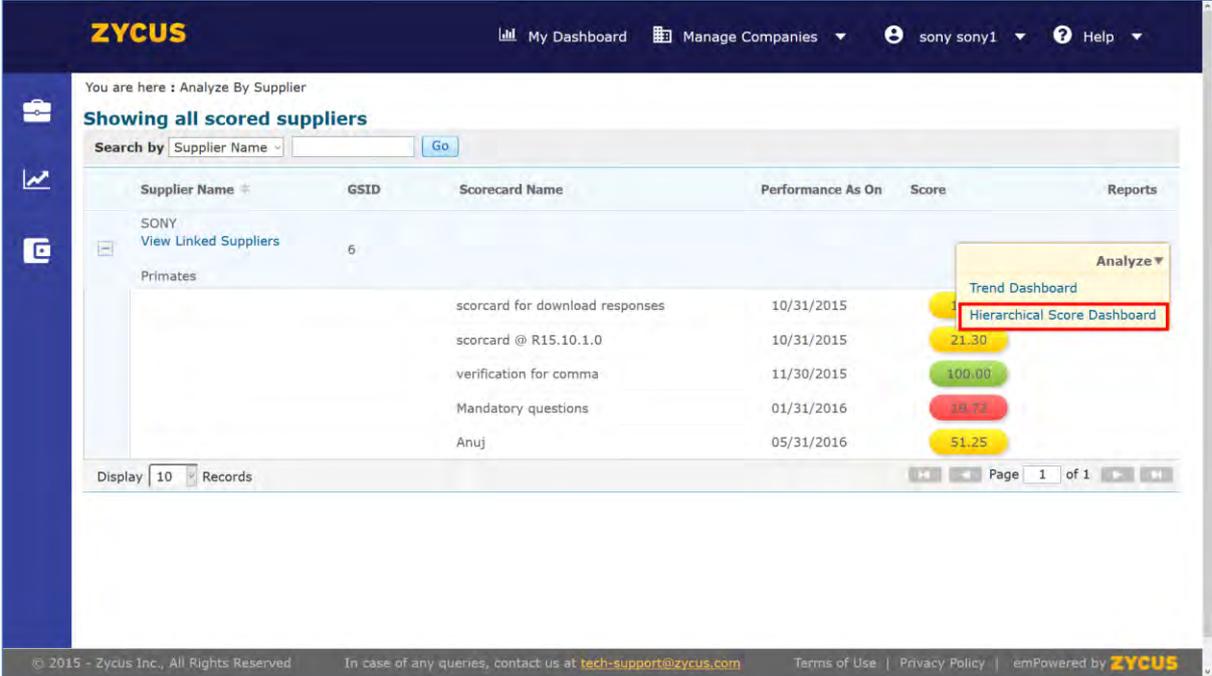
With the help of this feature, users can perform their own arithmetic calculations on the exported data. Just as you start making changes to the exported data, the graphs will also get changed accordingly.

There are hyperlink to take the user to the top of the excel export from each KPI View. There are hyperlinks to send the user to KPI View of a particular scorecard or send him to Scorecard view from KPI view.

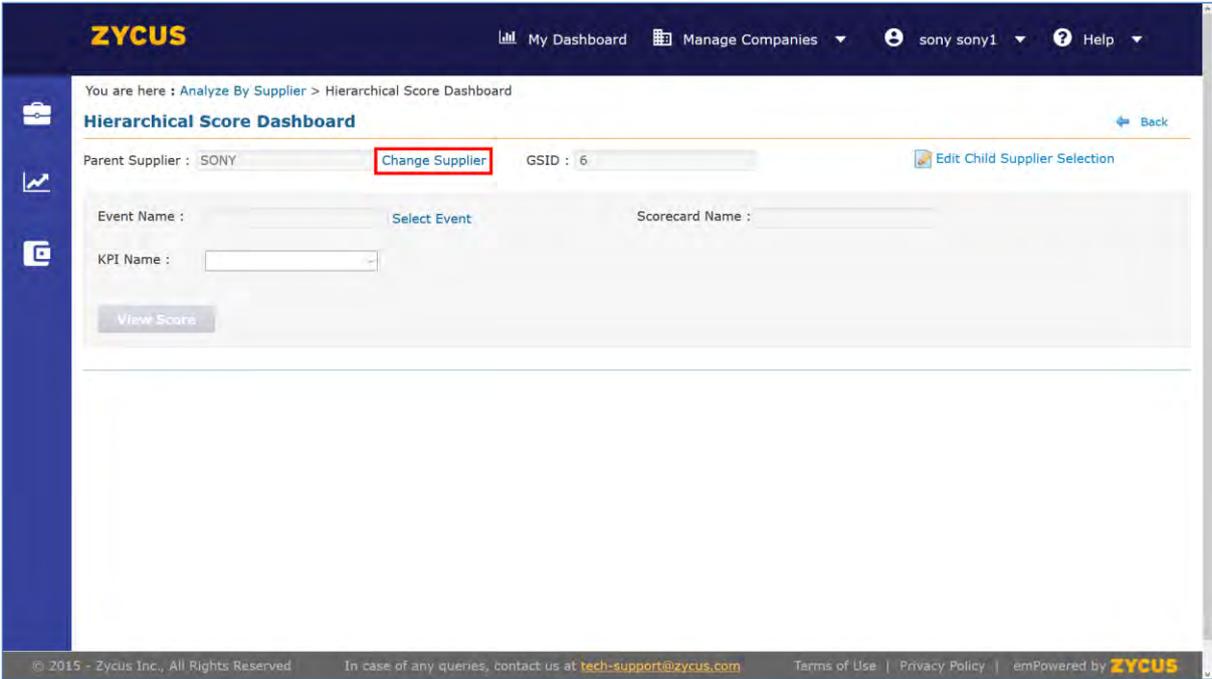
6.5.4.3 Hierarchical Score Dashboard

Hierarchical score dashboard allows you to view the event-specific KPI scores (Hierarchical Score) for a Parent and Child Supplier.

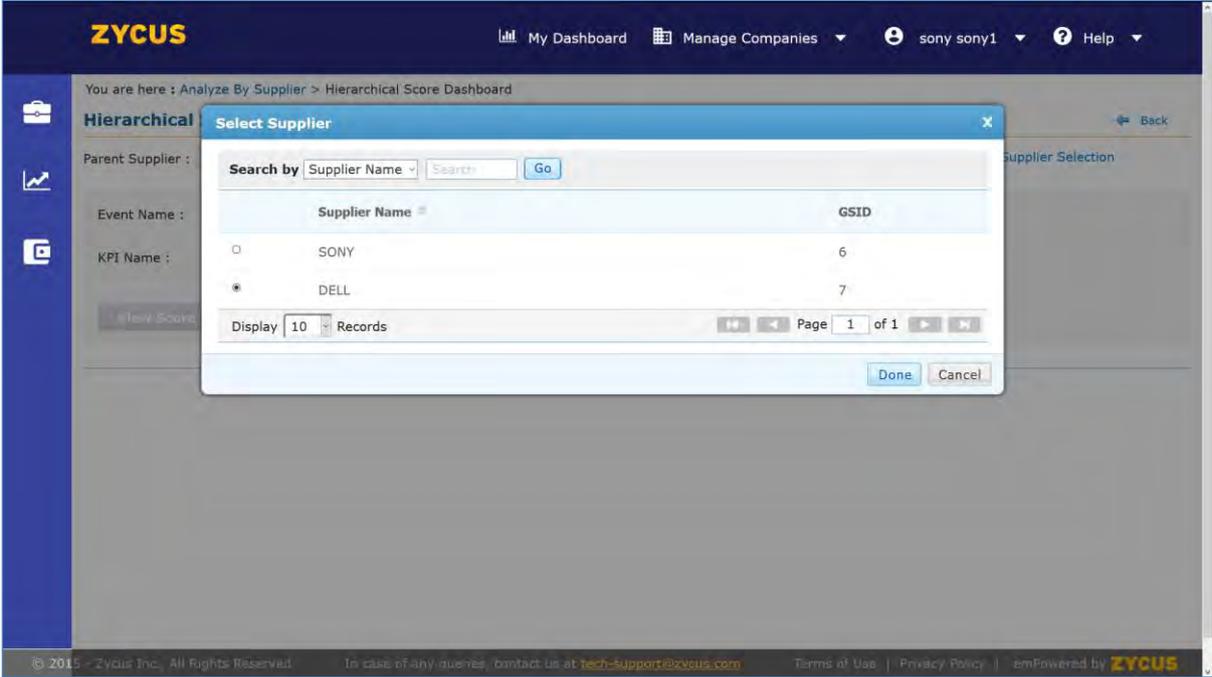
- 1. On the **Analyze by Suppliers** page, for a supplier go to the **Analyze** drop-down list, click the **Hierarchical Score Dashboard** option as shown below:



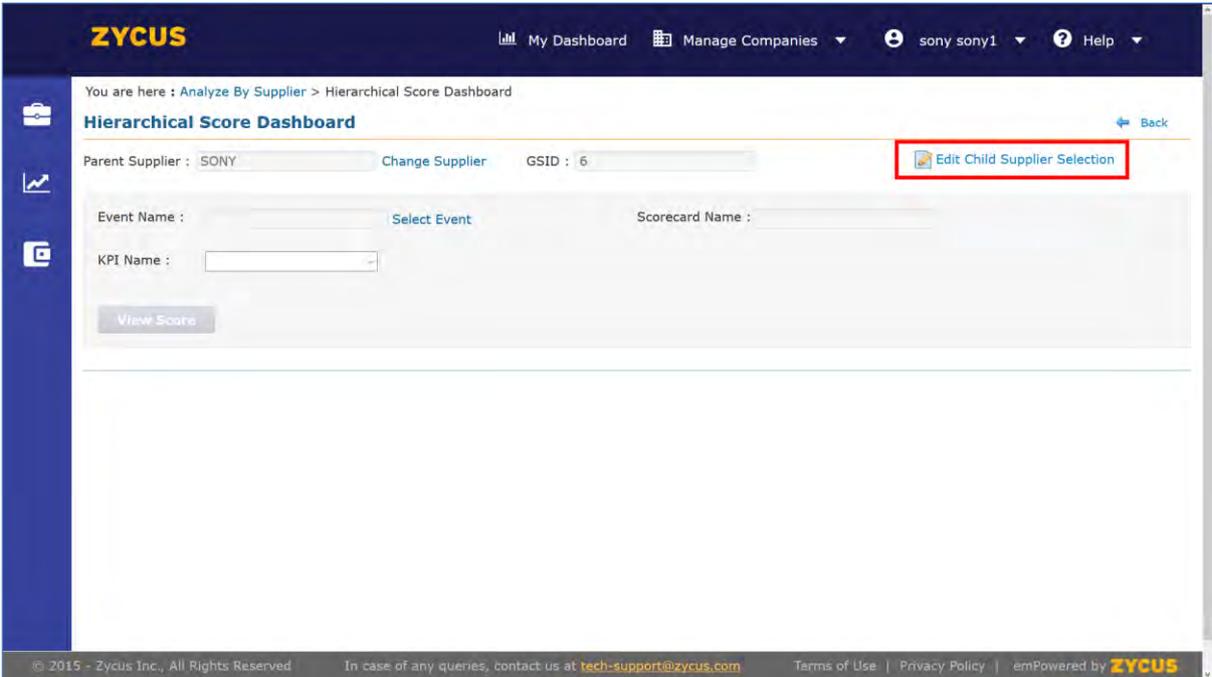
- 2. You will be navigated to the following page:



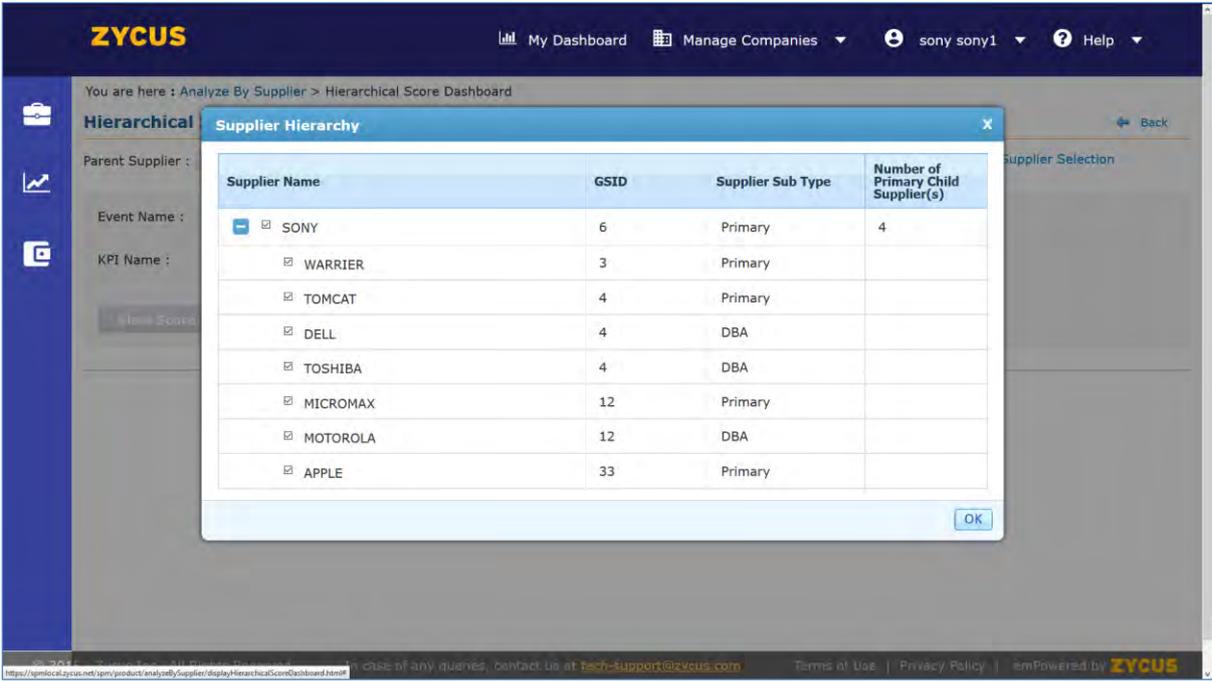
- 3. The selected supplier’s name will appear by default in the **Parent Supplier** field. You can change the supplier on this page by using the **Change Supplier** link (highlighted in the image above).
- 4. On clicking **Change Supplier**, following popup will appear:



- 5. Select a supplier and click **Done**. The supplier will change.
- 6. The selected supplier might have multiple child suppliers and their children. You can decide whose hierarchical score you want to view. To change the selection of child suppliers, click **Edit Child Supplier Selection**.

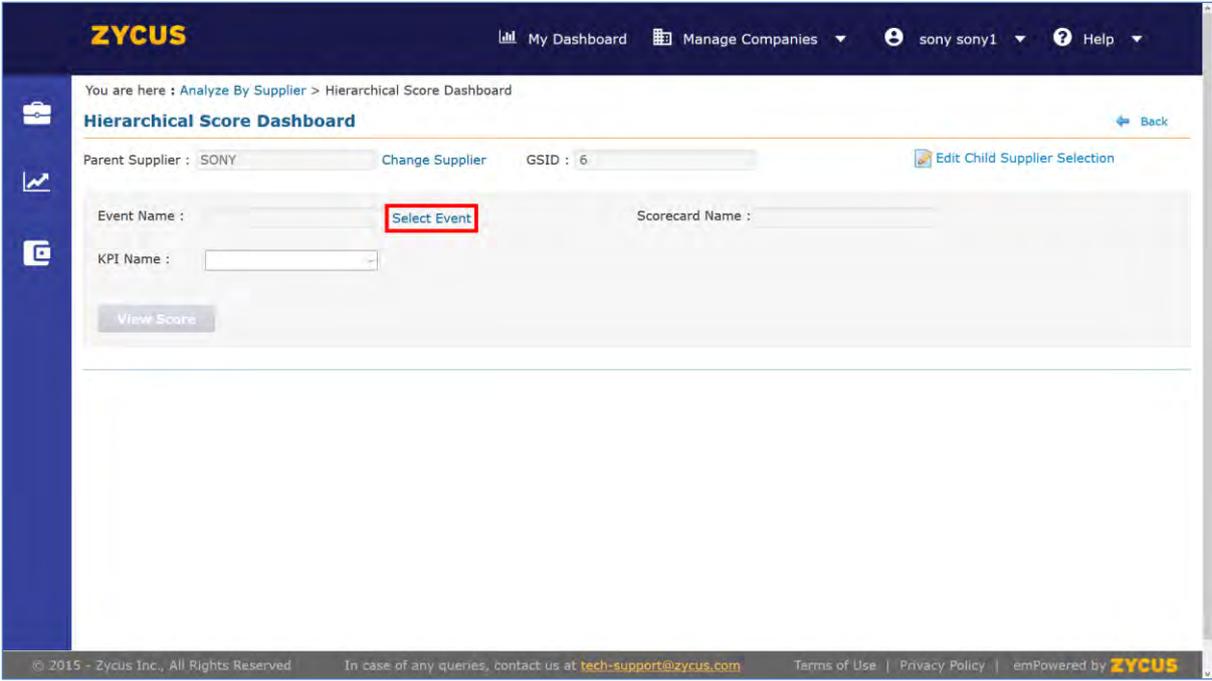


7. It will display the complete hierarchy of the selected supplier and its children and their children (if any) as shown below:



8. Deselect a supplier if that supplier is not to be included in the **Hierarchical Score** calculation and click **OK**.

9. Now click **Select Event** for which you want to calculate the **Hierarchical Score**.



10. Event popup will appear.

Select Event

Search by

Event Name	Scorecard Name	Event Owner	Status	Start Time	End Time
<input type="radio"/> Monthly Review October	Monthly Review	John Smith	Closed	2016/10/31 15:00	2016/10/31 15:12
<input type="radio"/> SCAR performance	SCAR	John Smith	Closed	2016/10/28 13:15	2016/10/28 13:58
<input type="radio"/> Monthly Review September	Monthly Review	John Smith	Closed	2016/10/21 22:50	2016/10/21 22:59
<input type="radio"/> Monthly Review August	Monthly Review	John Smith	Closed	2016/10/14 21:34	2016/10/14 21:38
<input type="radio"/> Monthly Review July	Monthly Review	John Smith	Closed	2016/10/14 19:55	2016/10/14 20:12
<input type="radio"/> Monthly Review June	Monthly Review	John Smith	Closed	2016/10/12 16:29	2016/10/12 16:34
<input type="radio"/> Monthly Review May	Monthly Review	John Smith	Closed	2016/10/12 13:50	2016/10/12 13:52
<input type="radio"/> Monthly Review April	Monthly Review	John Smith	Closed	2016/10/12 12:22	2016/10/12 12:32
<input type="radio"/> Monthly Review March	Monthly Review	John Smith	Closed	2016/10/12 12:05	2016/10/12 12:06

- 11. Select an event and click **Done**.
- 12. When an event is selected, the **Scorecard Name** will populate automatically in the field. You can choose which KPI you want to view. Click the drop-down against the **KPI Name** field.

**ZYCUS** My Dashboard Manage Companies sony sony1 Help

**Hierarchical Score Dashboard** Back

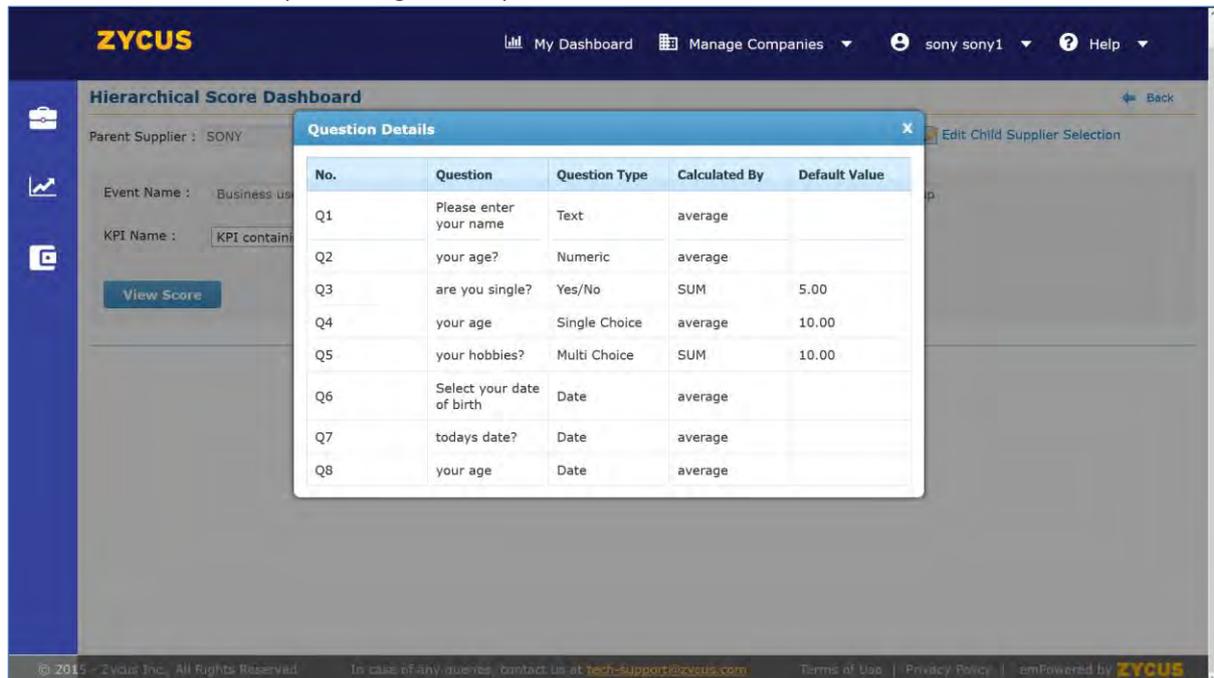
Parent Supplier : SONY Change Supplier GSID : 5 Edit Child Supplier Selection

Event Name : Business user Download re  Scorecard Name : scorcard for download resp

KPI Name :   
Select  
KPI containing all questions  
KPI for download responses

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- On selecting the KPI, a new link **List of Questions** appears next to the KPI Name dropdown. Click on that link. A **Question Details** pop will appear. This will display all the questions in the KPI and a few other details pertaining to the questions.



- After selecting the KPI, the **View Score** button will become enabled. On click, you will be able to view **Hierarchical Score** dashboard for the selections made.

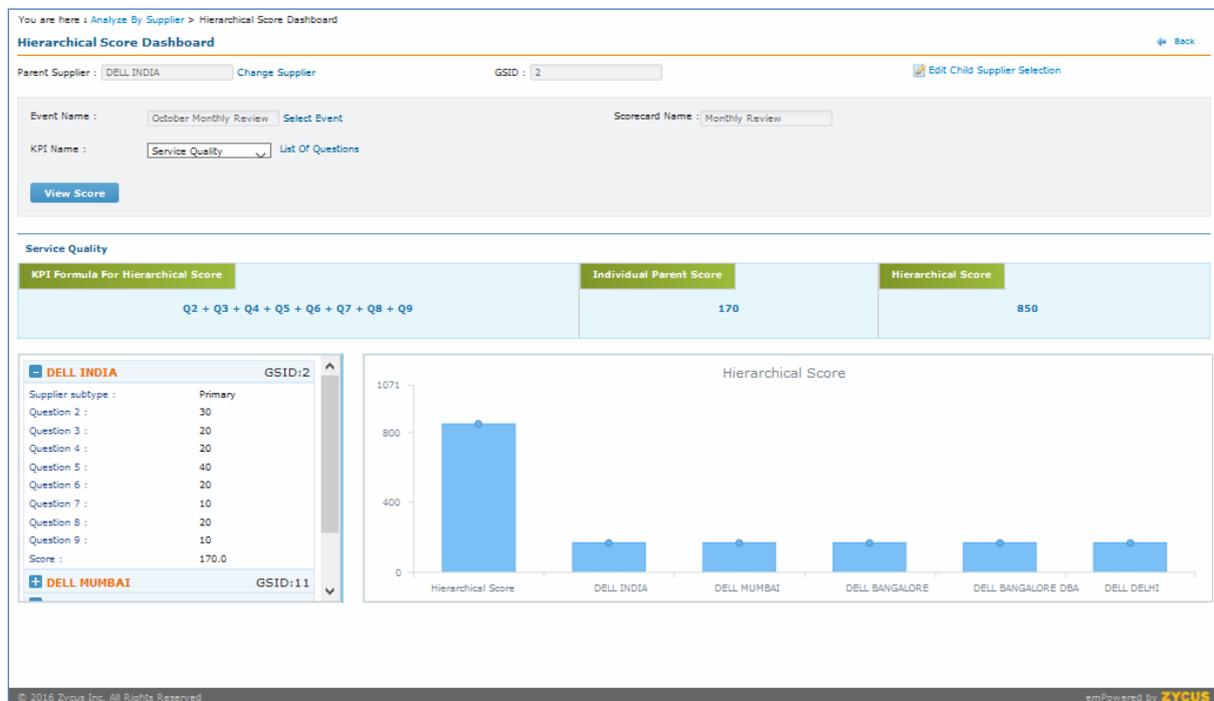


Figure 1: Hierarchical Score Dashboard

15. The **Hierarchical Score** dashboard will display the KPI formula of the selected KPI in the configuration phase.
16. The individual values for each question for each supplier are added.
  - For example, from above [Figure 1: Hierarchical Score Dashboard](#), (Value of Question 2 for DELL INDIA + Value of Question 2 for DELL MUMBAI + Value of Question 2 for BANGALORE + Value of Question 2 for DELL BANGALORE DBA + Value of Question 2 for DELL DELHI) = Q2. Q3 to Q9 will be calculated in a similar manner.
  - The values Q2 to Q9 are then used in the “**KPI formula for Hierarchical Score**” in order to calculate the **Hierarchical Score**.
  - The **Individual Parent Score** as well as **Hierarchical Score** are also displayed.
  - As per the [Figure 1: Hierarchical Score Dashboard](#), “DELL INDIA” is the parent supplier selected. Hence, the **Individual Parent Score** displayed will be that of DELL INDIA.
  - The side panel displays the list of other selected suppliers. The scores are also displayed in a graphical manner by the **Hierarchical Score Graph**.

### 6.5.5 How to View Development Programs?

Under **My Performance**, hover over **View Development Programs**. A list of Customer Company will be provided. Select the customer company of your choice for which you want to view the development programs. Following page will be displayed:

Program Title	Supplier Name	Goal	Owner	Status	Start Date	End Date	Actions
Test program 123	LENOVO		INadmin admin	Execute	01/09/2015	01/10/2015	Edit
program for lenovo published	LENOVO		inpu power	Execute	01/09/2015	30/09/2015	Edit
pro lenovo 22th	LENOVO	pro lenovo 22th	REPO REPO	Execute	02/09/2015	28/09/2015	Edit
program for lenovo 14 10 15 ZZZ@@	LENOVO	program for lenovo	REPO REPO	Closed	01/10/2015	31/10/2015	Edit
program for lenovo 14 10 15	LENOVO	program for lenovo	REPO REPO	Execute	01/10/2015	31/10/2015	Edit
program for lenovo concluded	LENOVO		inpu power	Closed	01/09/2015	30/09/2015	Edit
program for lenovo executed	LENOVO		inpu power	Conclude	01/09/2015	30/09/2015	Edit
Test program	LENOVO		inpu power	Execute	01/09/2015	30/09/2015	Edit
pro lenovo 22th Closed	LENOVO	lenovo@tms.com	INadmin admin	Closed	02/09/2015	28/09/2015	Edit
pro lenovo 22th Executed	LENOVO	pro lenovo 22th Executed	INadmin admin	Conclude	02/09/2015	28/09/2015	Edit

1. If you are the owner of a development program, then you will be able to edit it.
2. Click on the program title, you will be navigated to **Program Summary** page for that program.

**Program Summary for 'pro lenovo 22th'**

**Goal**  
pro lenovo 22th

**Supplier Name**  
LENOVO

**Program Owner**  
REPO REPO

**Program Outline Details**

**Program Benefits**  
Default Benefit, ayush benefit

**Incentives for Supplier**  
incentive ayush, Default Incentive

**To Improve Scorecard Score**

Scorecard	Current Score	Target Score	Performance Report
TEST SCORECARD	NA	123456789012345.00	<a href="#">Performance Report</a>

**To Improve KPI Score**

KPI	Current Score	Target Score	Performance Report
test data 1	11.00	123456789012.44	<a href="#">Performance Report</a>

**Program Resources Details**

Resource Name	Type of Resource	Cost
Internal Member	Internal Employees	-NA-
ayush	resource ayush	100.0

**Attachments**

File Name	Size	Uploaded On	Download
PIL_Event_YEARLY_Questionnaire_2015-08-31_13.38.xlsx	10.2 KB	22/09/2015	<a href="#">Download</a>
SIM_Ref_15_06_1_0_HIGH_Questionnaire_2015-09-03_11.42.xlsx	11.7 KB	22/09/2015	<a href="#">Download</a>

**Program Schedule And Plan Details**

Start Date: 02/09/2015      End Date: 28/09/2015

Name	Owner	Status	Start Date	End Date
mile Active 22	Internal Member	Not Started	05/09/2015	27/09/2015
sub overdue	Internal Member	Not Started	10/09/2015	15/09/2015
Mile from portal	LENOVO LENOVO	Not Started	05/09/2015	25/09/2015
sub from portal	LENOVO LENOVO	Not Started	10/09/2015	20/09/2015
Task up 22	Internal Member	Not Started	24/09/2015	26/09/2015
Task UP lenovo	LENOVO LENOVO	Not Started	25/09/2015	27/09/2015

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3. Click [Performance Report](#) , to view the performance report details. You will get following popup:

**Performance Report 'Water Supplier'**

**Supplier Performance Report**

**Supplier Name :** LENO...

**Supplier Type :** Operational      **Supplier Sub Type :** Primary

**Event Name :** test event 2      **Event Date :** 21/09/2015 To 21/09/2015

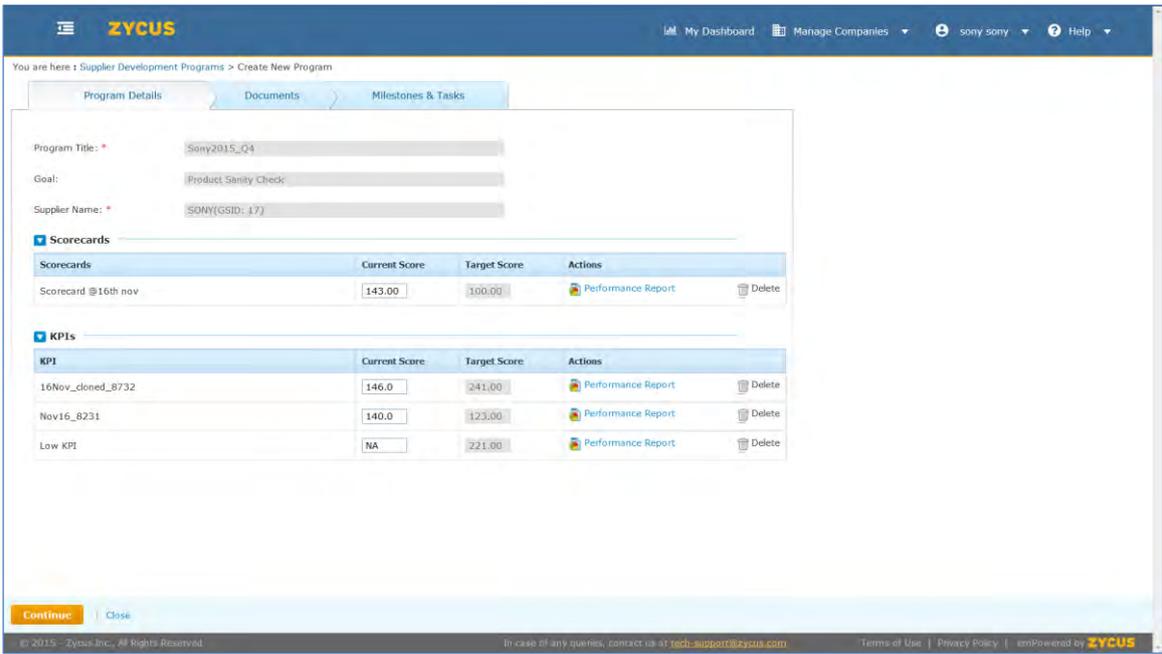
**Scorecard Used :** TEST SCORECARD      **Evaluation Period :** 01/08/2015 To 31/08/2015

**Report Summary**

Scorecard Score	Trend	All Supplier's Average	Formula	Problem Area	Meets the Target	Overachieves the Target
NA	NA	NA	KPI1 + KPI2	<=30.00	> 30.00 & <= 80.00	> 80.00

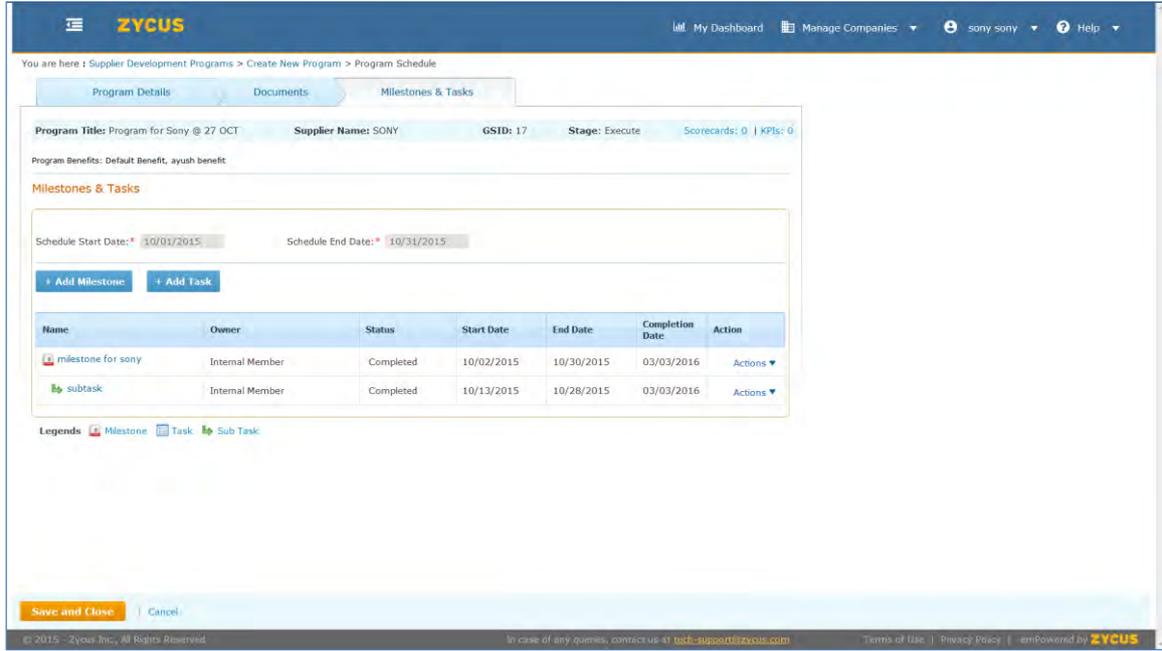
#	KPI Name	Score	Trend	All Supplier's Average	Problem Area	Meets the Target	Overachieves the Target
KPI 1	test data 1	11.00 / 100.00	89.00% ▼	90.00	<=30.00	> 30.00 & <= 80.00	> 80.00

4. Click **Edit** against the program title of which you are an owner. You will see following page:



**NOTE:** You will be able to view **Program Details** section of a Program. However **Program Details** section will be view only. You will not be able to make any edits in this section.

5. You can upload a document or delete a document uploaded of your ownership.
6. Click on the **Milestones & Task** tab.



7. You will be able to see your milestones and tasks along with the internal user’s milestones and task.

**NOTE:** You will be able to edit or delete a milestone and task if you are the owner.

**NOTE:** You will be able to only add a task for internal member. **Edit** and **Delete** functionality will be greyed out.

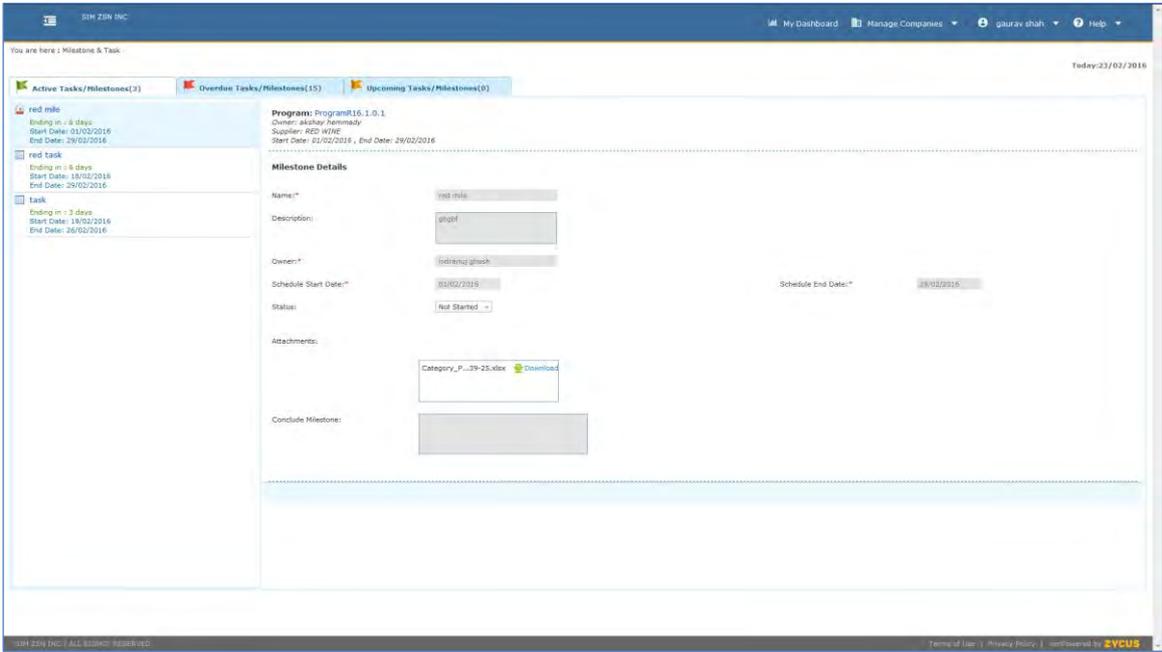
8. Identify a milestone or task of which you are an owner and click on **Actions** drop-down.

	supplier milestone active	LENOVO LENOVO	In Progress	08/09/2015	28/09/2015	<b>Actions</b> ▾ Add Task Edit Delete Actions ▾
	supplier upcoming	LENOVO LENOVO	Completed	26/09/2015	28/09/2015	
	mile lenovo active	LENOVO LENOVO	Not Started	11/09/2015	30/09/2015	
	sub task lenovo upcoming	LENOVO LENOVO	Not Started	26/09/2015	30/09/2015	

9. You will have an option to add new task, edit or delete.

**6.5.6 How to View Tasks and Milestones?**

From the side panel, under **My Performance**, hover over **View Tasks and Milestones**. You will see a list of customer company whose tasks and milestones you can view. Select a customer company of your choice. You will be navigated to following page:



1. On this page, you will be able to view **Active Tasks/Milestones**, **Overdue Tasks/Milestones**, and **Upcoming Tasks/Milestones**.

## 6.5.7 How to View Reminders?

From the side panel, under **My Performance**, hover on **View Reminders**. From the list of customer companies, select the customer company regarding which you want to view the reminder. You will be navigated to following page:

Generated On	Supplier Name	Description
10/02/2016 17:10	ZSP ON NEW RM	Reminder to score the event 'zsn event'.
10/02/2016 17:10	SPM SANDBOX	Reminder to score the event 'zsn event'.
17/01/2016 09:00	SPM SANDBOX	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
17/01/2016 09:00	SPM-SIM FAILOVER	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
17/01/2016 09:00	ZSP ON NEW RM	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
16/01/2016 09:00	SPM SANDBOX	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
16/01/2016 09:00	ZSP ON NEW RM	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
16/01/2016 09:00	SPM-SIM FAILOVER	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0_123</a> '.
05/01/2016 11:55	SPM SANDBOX	Reminder to score the event ' <a href="#">Sanity@R15.12.1.0</a> '.
02/12/2015 19:33	ZSP ON NEW RM	Reminder to complete Task: 'supp task' (Program: 'R15.10.1.0 dup')

Display 10 Records Page 1 of 4

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1. You will be able to view all the reminders posted by the customer on this page.
2. You will be able to view the reminder generated on date-time, supplier name, and description of the reminder.
3. In the reminder description, the event name for which a reminder is created will be hyperlinked. Click on the event name and you will be navigated to the corresponding page.

## 6.5.8 How to View Notifications?

From the side panel, under **My Performance**, hover on **View Notifications**. From the list of Customer Company, select the customer company regarding which you want to view the reminder. You will be navigated to following page:

Generated On	Supplier Name	Notifications
10/02/2016 17:42	ZSP ON NEW RM	Event 'zsn event' open for scoring, until (11/02/2016 17:00).
10/02/2016 17:42	SPM SANDBOX	Event 'zsn event' open for scoring, until (11/02/2016 17:00).
10/02/2016 17:31	RED WINE	Performance report published for the event 'R16.01.0.1_1'.
10/02/2016 17:31	SPM-SIM FAILOVER	Performance report published for the event 'R16.01.0.1_1'.
10/02/2016 17:31	SPM SANDBOX	Performance report published for the event 'R16.01.0.1_1'.
10/02/2016 17:31	SPM SANDBOX	Performance report published for the event 'R16.01.0.1_1'.
10/02/2016 17:31	ZSP ON NEW RM	Performance report published for the event 'R16.01.0.1_1'.
10/02/2016 17:30	SPM SANDBOX	Performance report published for the event 'zsn event'.
10/02/2016 17:30	SPM SANDBOX	Performance report published for the event 'zsn event'.
10/02/2016 17:05	ZSP ON NEW RM	Event 'zsn event' open for scoring, until (19/02/2016 17:10).

1. Here you will be able to view all the notifications created by the customer.
2. You will be able to view the reminder generated on date-time, supplier name, and description of the notification.
3. In the notification description, the event name for which a notification is created will be hyperlinked. Click on the event name and you will be navigated to the corresponding page.

## 6.6 My Events

**NOTE:** The above-mentioned menu may or may not be available based on the access provided to you by customer.

1. The **My Events** option allows the user to view the sourcing events and downloads.



2. Hover on **View Sourcing Events**, you will be able to view the list of customer company. Select the customer company of your choice. Following page will be displayed:

Event ID	Name	Owner	Open Date	Close Date	Type	Invite Type	Status	Action
1610028499	<a href="#">Event1_Keypoint_close_and_new_closed</a>	ZSNMICH1 F1	02/10/2016 21:00	02/10/2016 22:01	RFQ	Invited	Negotiation In Progress	Enter Event
1610028487	<a href="#">Test Auction Flex</a>	ZSNMICH1 F1	02/10/2016 13:44	02/14/2016 19:23	Auction	Invited	Bidding In Progress	Enter Event
1610026475	<a href="#">Bus 246692 - Total Amount entered in First 10</a>	ZSNMICH1 F1	02/08/2016 11:07	02/14/2016 13:22	Auction	Invited	Bidding In Progress	Enter Event
1610028441	<a href="#">Clark Co.</a>	ZSNMICH1 F1	02/04/2016 15:18	02/04/2016 15:45	RFQ	Broadcasted	Closed	View Event
1610028439	<a href="#">Test flex</a>	ZSNMICH1 F1	02/04/2016 13:26	02/04/2016 14:00	RFQ	Invited	Closed	View Event
1610028355	<a href="#">Bus 246761 - New Lot total price is not getting</a>	ZSNMICH1 F1	01/29/2016 14:55	01/29/2016 15:03	RFQ	Invited	Closed	View Event
1610028336	<a href="#">Bus 246449 - ZSN Integration Mail sent while</a>	ZSNMICH1 F1	01/28/2016 18:24	02/18/2016 17:47	Auction	Invited	Bidding In Progress	Enter Event
1610028300	<a href="#">Reschedule Auction</a>	ZSNMICH1 F1	01/25/2016 15:56	02/18/2016 17:47	Auction	Invited	Bidding In Progress	Enter Event
1610028296	<a href="#">Site 2</a>	ZSNMICH1 F1	01/25/2016 13:59	01/25/2016 15:47	RFP	Invited	Negotiation Rejected	Enter Event
1610028275	<a href="#">Auction vls</a>	ZSNMICH1 F1	01/22/2016 19:04	02/18/2016 17:47	Auction	Broadcasted	Bidding In Progress	Enter Event

3. Select the supplier company from the drop-down on the top right corner.



4. Under the **Actions** tab on the right, you can enter an open event or view the closed event.
5. Hover over the View Downloads option, you will be able to view the list of customers. Select the

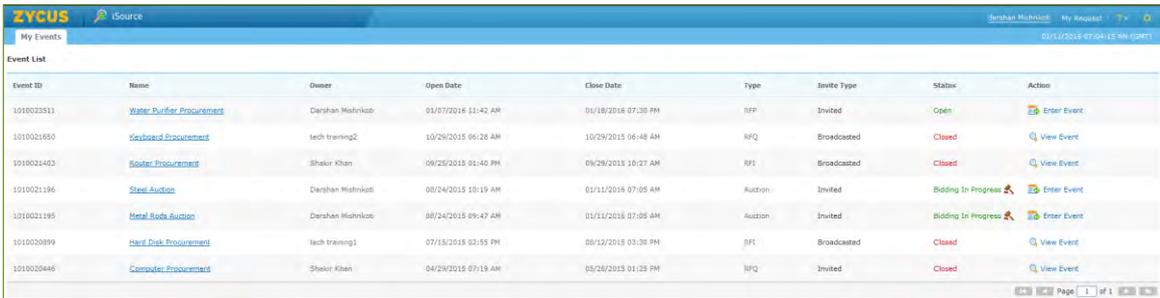
customer of your choice. Following page will be displayed:



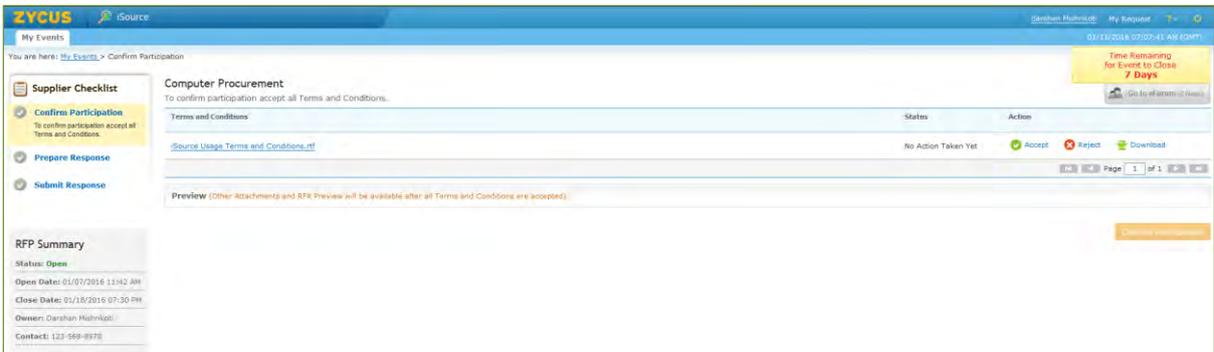
6. You will be able to download your response for a particular event.
7. Under the **Actions** tab, you will have option to download your responses for particular event.

### 6.6.1 How to Enter an Event?

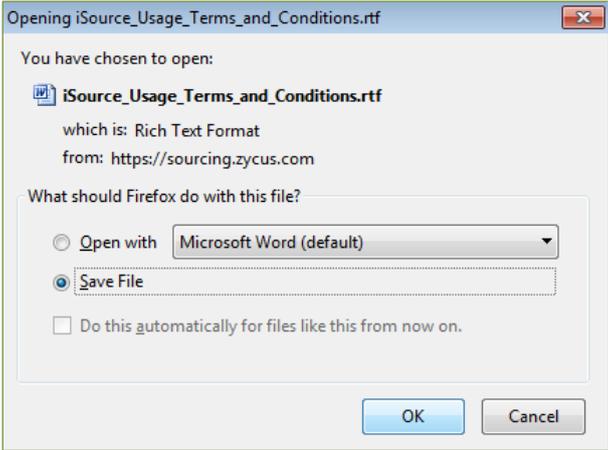
1. On the **My Events** page, click on **Enter Event**.



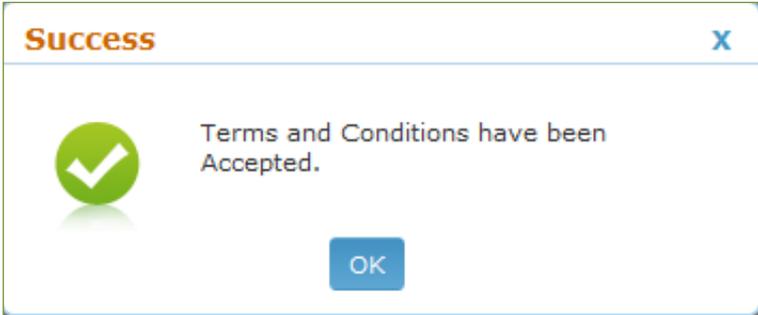
2. After you enter an Event, you are navigated to the **Confirm Participation** page as shown:



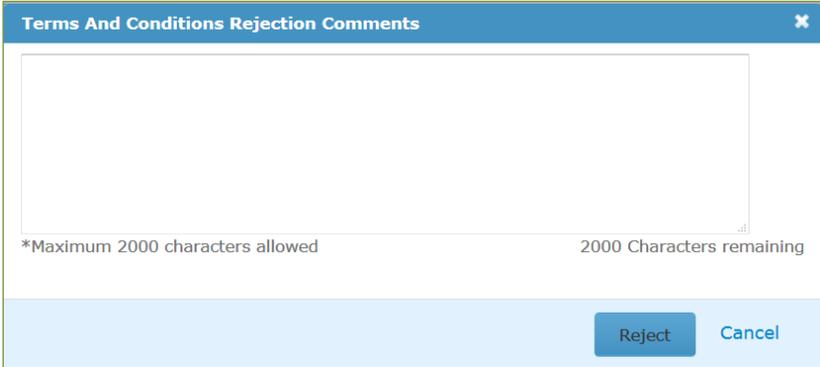
3. You can read or download the **Terms and Conditions**, by clicking the **Download** button.



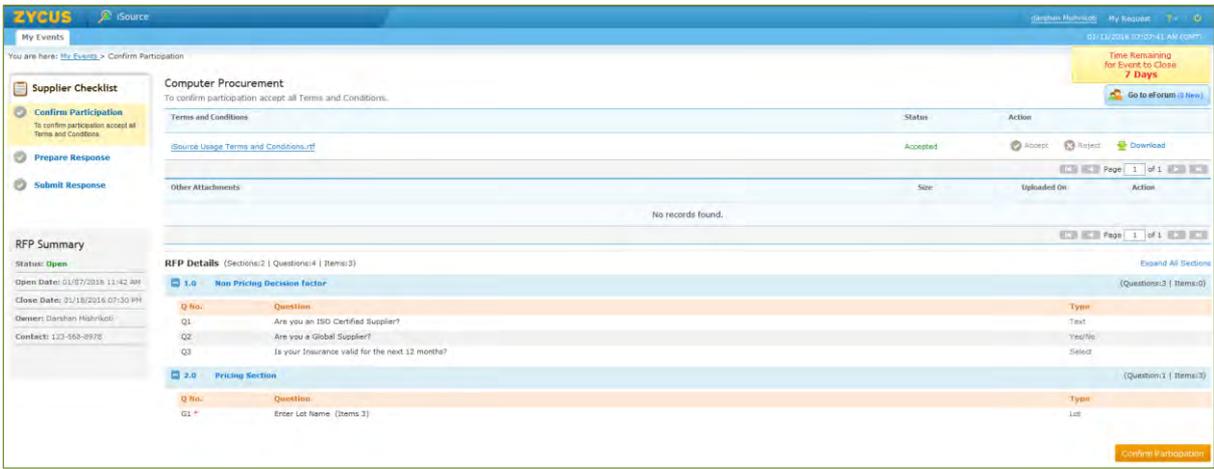
4. Click on **Accept** to accept the terms and conditions. The following popup will be displayed:



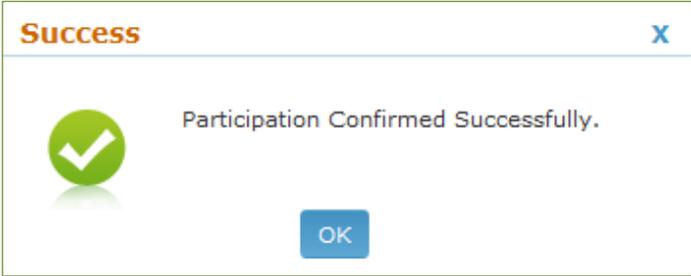
5. Click on **Reject** to reject the terms and conditions. A **Rejection Comments** pop up is displayed.



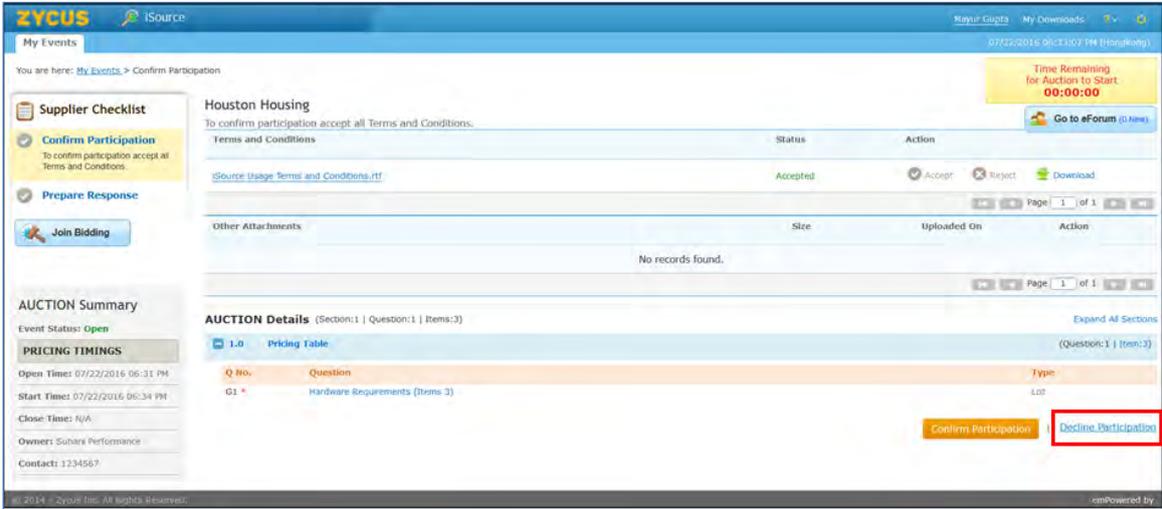
- 6. Enter the comments for your rejection, and click on **Reject**.
- 7. After you accept the terms and conditions, you can review RFX event.
- 8. The RFX event consists of an overview of questions in the **Non-Pricing Decision Factor** and **Pricing Section**.
- 9. You can view the details by expanding each section using the plus icon.
- 10. You can close a section by using the minus icon.



11. Once you review these details, you can confirm participation by clicking **Confirm Participation**.
12. On confirming the participation, you get the following popup:

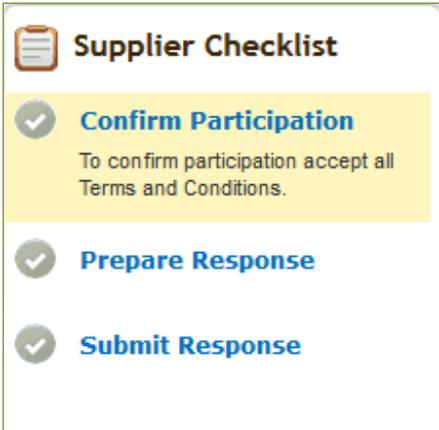


13. Once you review these details, you can decline participation by clicking **Decline Participation**.

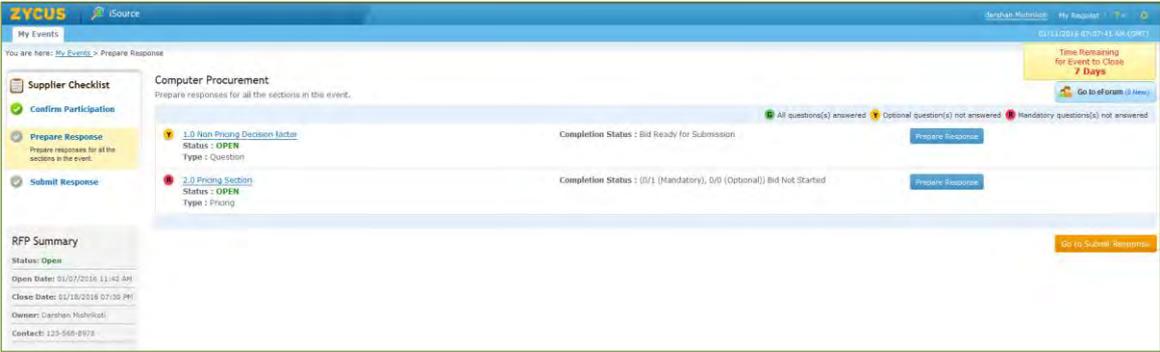


**NOTE:** If a supplier has declined participation, he can confirm the participation again. However, participation once confirmed cannot be declined.

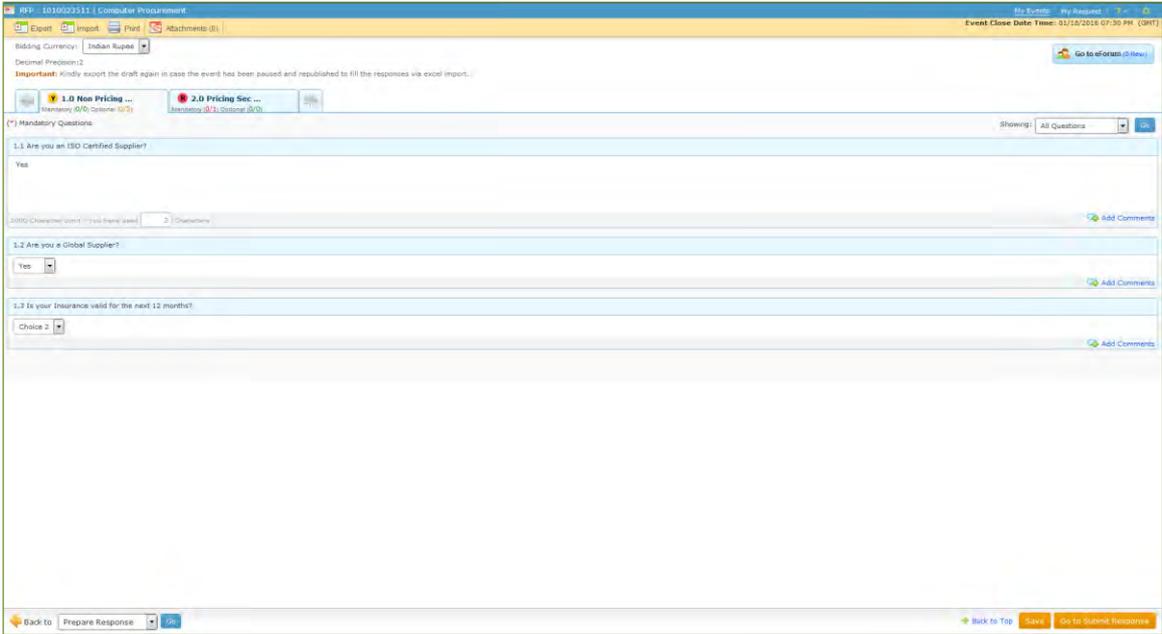
- 14. To respond to the RFX, there are three tasks to follow:
  - Confirm/Decline Participation
  - Prepare Response
  - Submit Response
- 15. Once you confirm your participation, you complete the first task off of the **Supplier Checklist**.



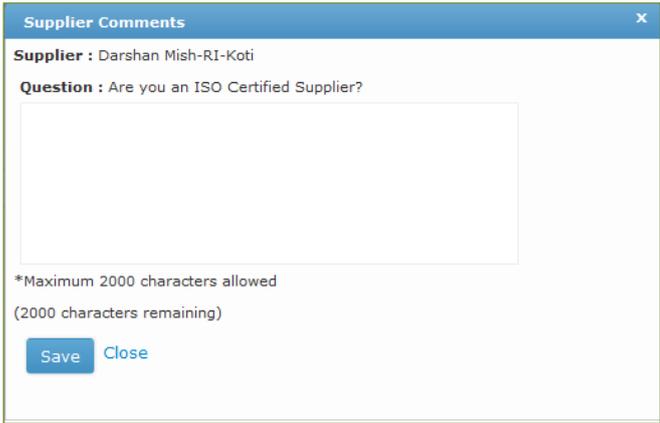
16. Once you confirm participation, you are redirected to the **Prepare Response** page as shown:



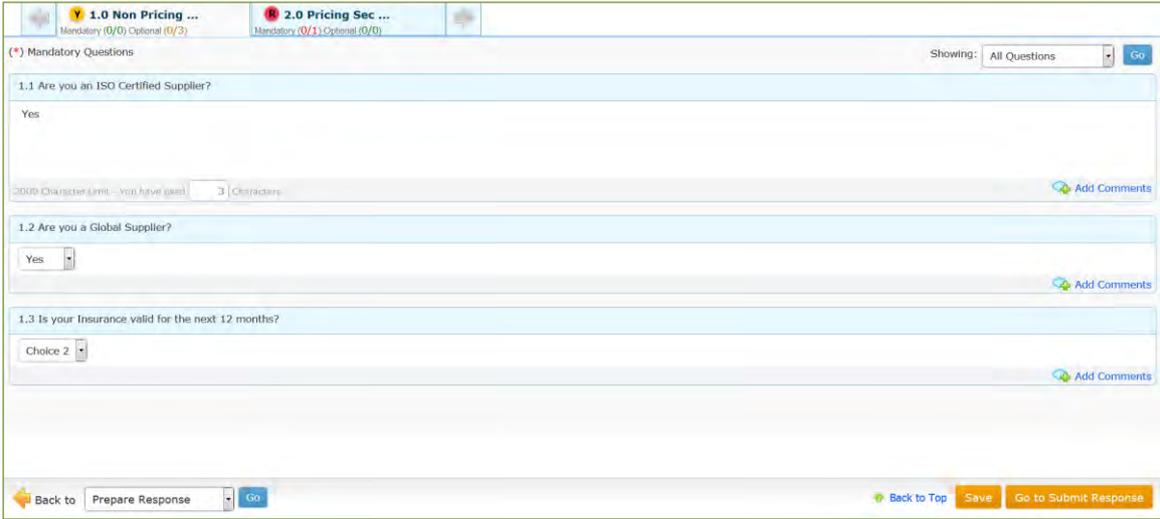
- 17. You can fill in the responses section-wise by clicking on **Prepare Response** corresponding to a particular section.
- 18. The RFX editor page to prepare responses is displayed as shown:



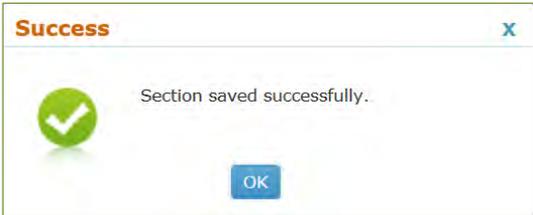
- 19. Enter your response for a particular section.
- 20. Click on **Add Comments** to enter comments for a particular question. Following pop up will be displayed:



- 21. Write comment for respective questions and **Save**.
- 22. After entering your response and comments for one section, click **Save**. It will save the respective sections with the information you have added.

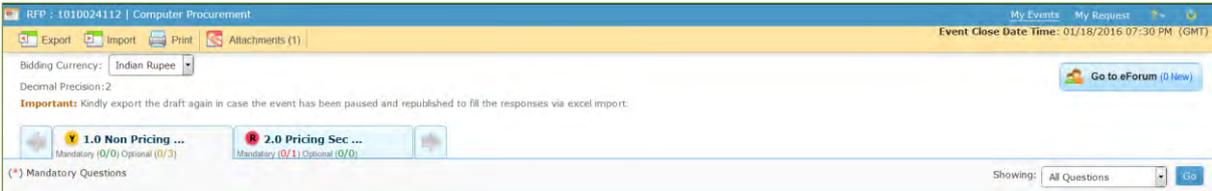


23. On saving, the following popup is displayed:



24. Similarly enter your response for other section and save it.

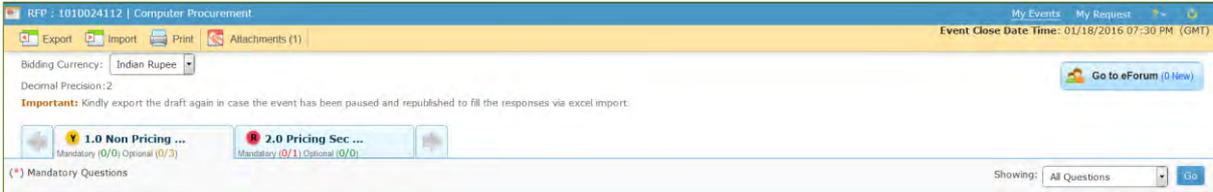
25. iSource allows the user to export the non-pricing questions to MS Excel (.xlsx) to prepare responses offline in the spreadsheet itself, and once the responses are prepared, the same file can be imported in to the iSource tool. All the prepared responses will be uploaded & displayed in the tool.



26. Click **Export** > Save the file on your computer > Open the file > Respond to the questions > Save the file.

Number	Label	Type	Responses	Comments
1.0	Non Pricing Decision factor			
1.1	Are you an ISO Certified Supplier?	Text		
1.2	Are you a Global Supplier?	Yes/No		
1.3	Is your Insurance valid for the next 12 months?	Single Choice		

27. To import the file, Click **Import**.



27. **Browse > Upload**

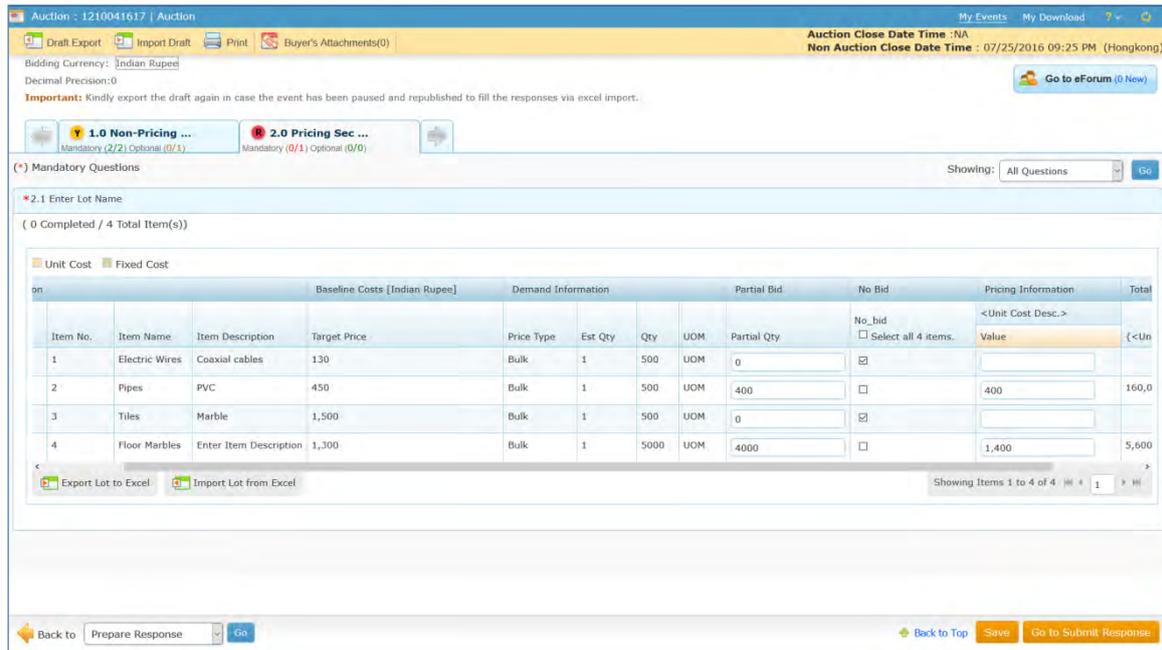
**Import existing Excel document**

Press Browse to search an existing excel document and then press Upload.

No file selected.

**Note:** Please do not change the file extension manually.

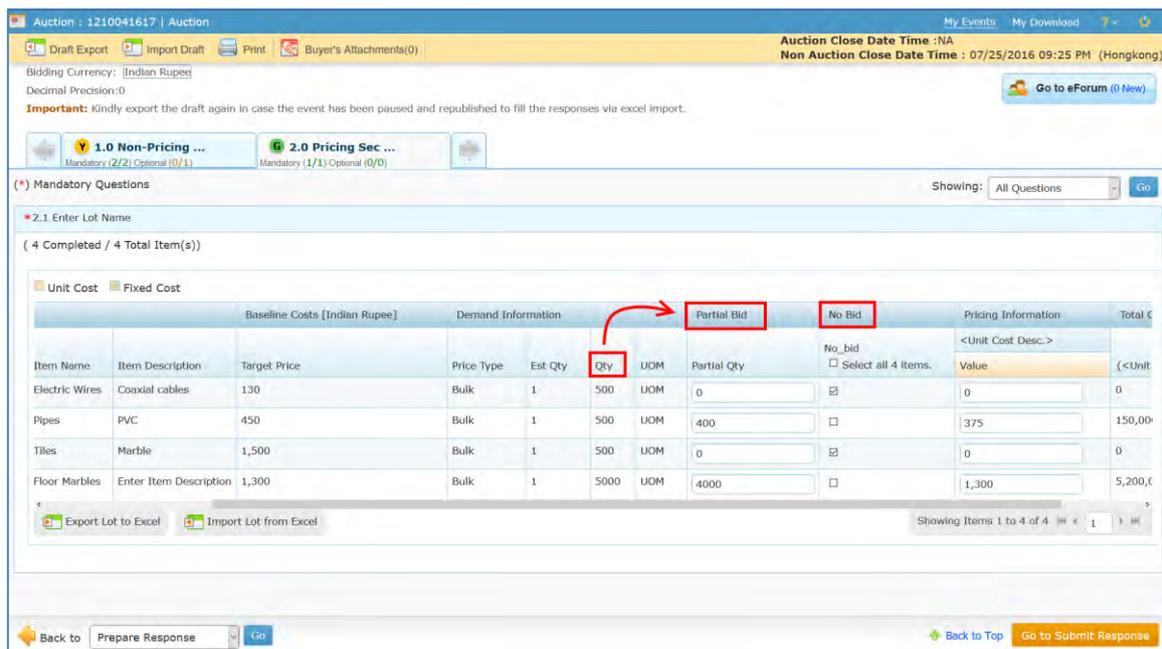
28. If the response consists of pricing section, fill the sections as per each line item. Shown below is an image of pricing table:



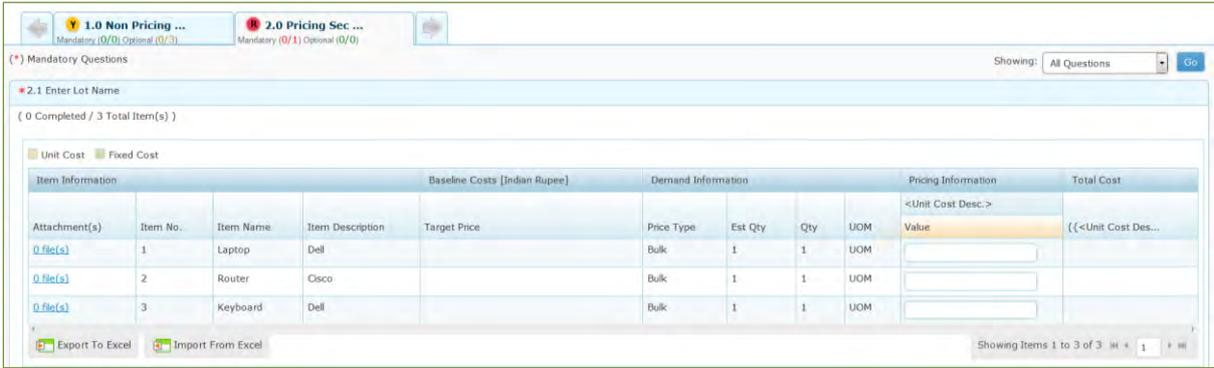
### Bidding Options

**Partial Bid:** Partial bidding will allow the supplier to bid for partial quantity. For example, if required quantity is 500, supplier can choose to bid for only 400.

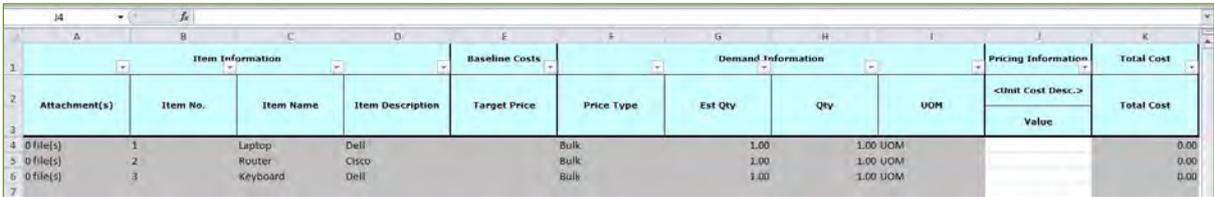
**No Bid:** If the supplier does not want to bid for a particular, he can check the box in “No Bid” column against that line item.



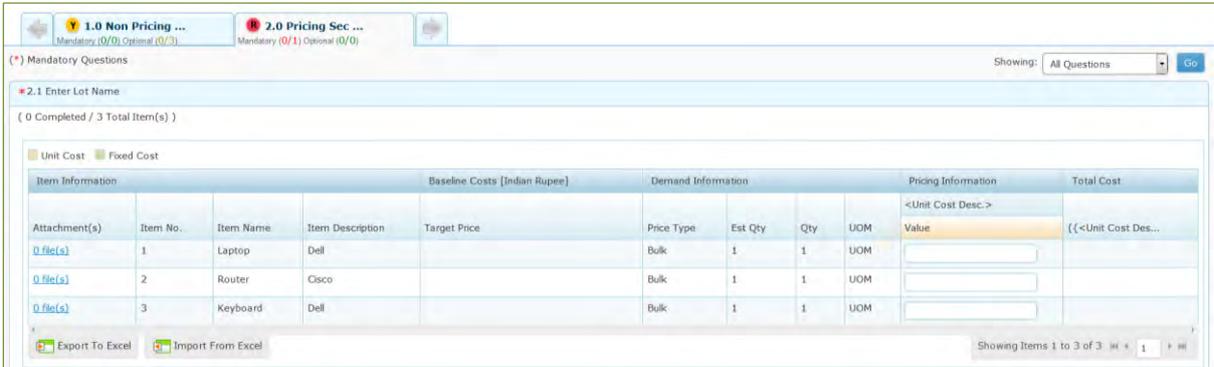
29. Users can also export the **Items Table** to MS Excel (.xlsx) to prepare offline responses in the spreadsheet. Once the responses are prepared, the same file can be imported into **iSource** tool.



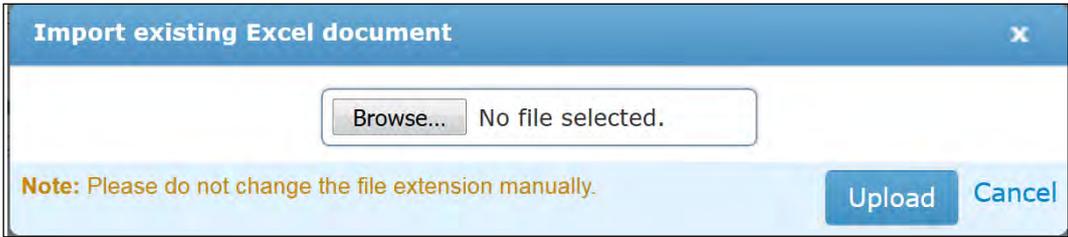
30. Click on **Export** > Save the file on your computer > Open the file > Fill your responses > Save the file.



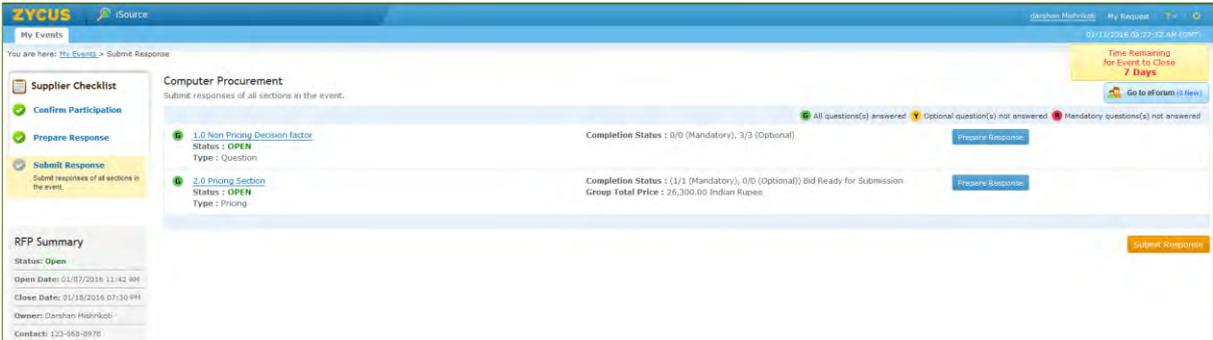
31. To import the file, Click **Import**.



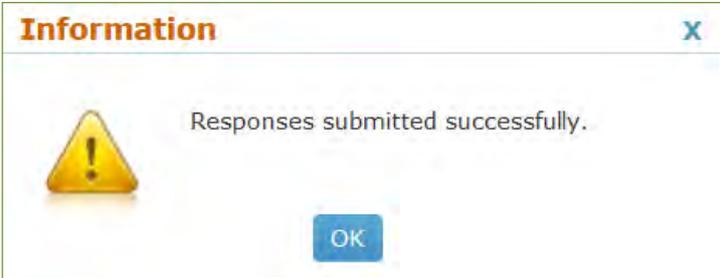
32. **Browse > Upload**



32. Click on **Submit Response** on the **Supplier Checklist**. The **Supplier Submit Response** page is displayed:

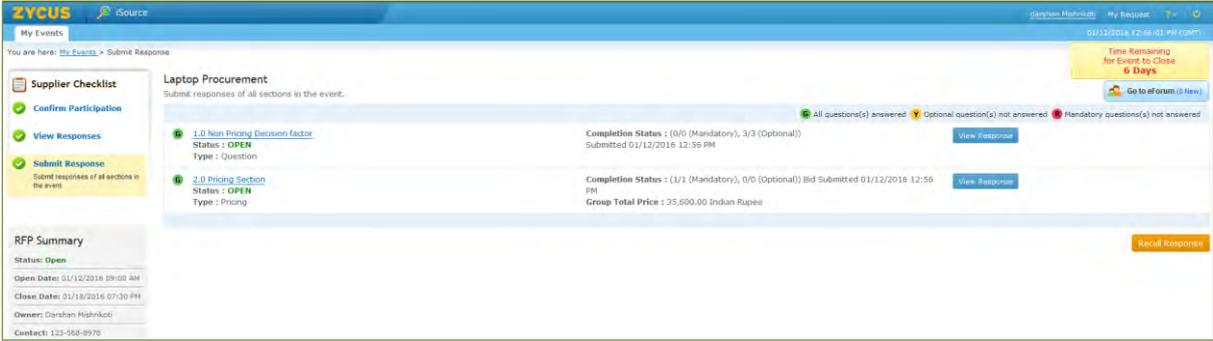


33. Click on **Submit Response**, following popup is displayed:

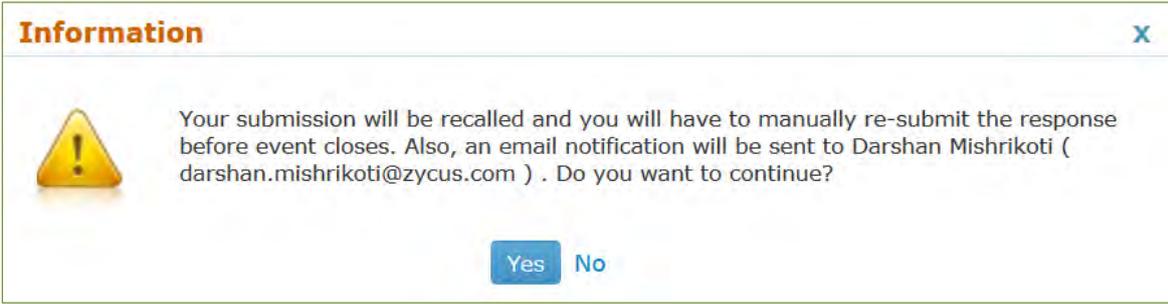


### 6.6.2 How Can I Recall My Response?

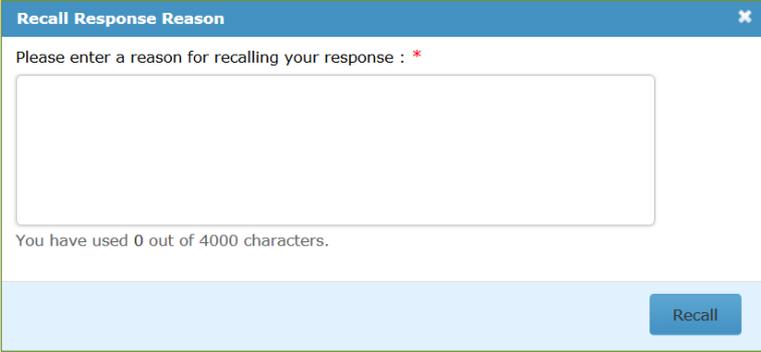
- 1. A response to RFP and RFQ events can be recalled only if that event is open.
- 2. Open the event whose response you want to recall, you will be redirected to following page:



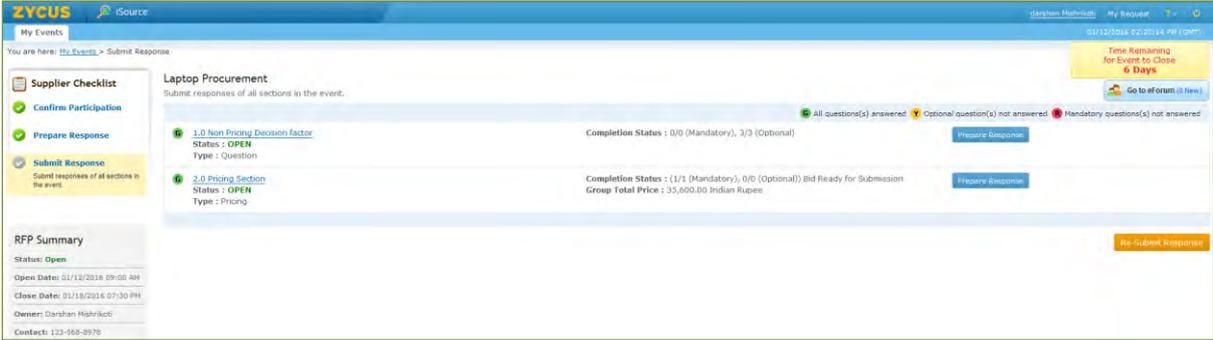
3. Click on **Recall Response**. Following popup will be displayed:



- 4. Once you recall an event, you will have to manually resubmit the response before the event closes for it to count. The **Event Owner** will be notified about the response recall action through email.
- 5. When you recall an response, a **Recall Response Reason** popup will be displayed as shown:



- 6. When you recall a response, the page will refresh and re-direct suppliers to the responses page where they can edit responses.



- 7. The **Recall Response** button will be replaced with **Re-Submit Response**.

**6.6.3 How Can I Negotiate Pricing?**

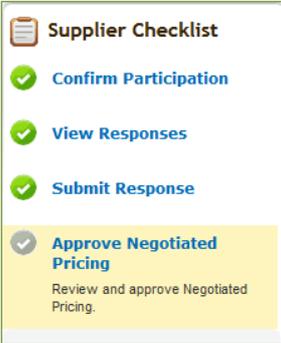
1. Once a Buyer chooses to conduct a negotiation, you will receive an email from the buyer inviting you to review the negotiated pricing and provide your approval for the same. In the email, along with the event details, you will also get your username and URL link for the event in the email.



2. Once you login to the supplier portal, on the **My Events** page, the RFQ event for which the buyer wants to negotiate the pricing will be listed with the status **Negotiation in Process**.

Event ID	Name	Owner	Open Date	Close Date	Type	Invite Type	Status	Action
1010023811	Laptop Procurement	Darshan Mishra	01/07/2016 11:42 AM	01/11/2016 12:37 PM	RFP	Invited	Negotiation In Progress	Enter Event

3. When you click on such event, there will be a new section called **Approve Negotiated Pricing** visible under the **Supplier Checklist**.



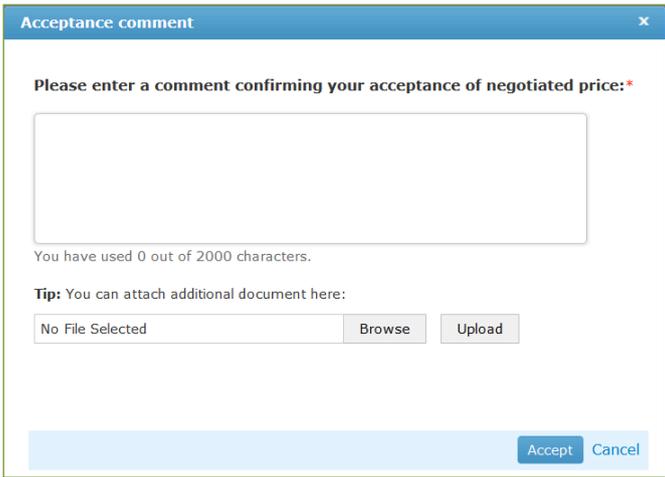
4. The user can get to view the **Original Bid Value, Negotiated Bid Value and % Change in Bid Value** for each and every phase of negotiation.



5. After entering the event, under the **Actions** tab, supplier can either **Accept**, **Reject**, or **Export Pricing Details**.



6. To approve, click on **Approve** from **Actions** drop-down list.



7. In **Acceptance Comment** box, enter your comments for confirming the acceptance of negotiated price and click on **Accept**.

8. Once you accept the negotiation, the status changes to **Approved**.



9. The status for the event on My Events page will change to **Negotiation Accepted**.



10. To reject, click on **Reject** from **Actions** drop-down list.

A dialog box titled 'Rejection comment' with a close button (X). The text inside says: 'Please enter a comment confirming your rejection of negotiated price: \*'. Below this is a large text input field. Underneath the field, it says 'You have used 0 out of 2000 characters.' Below that is a tip: 'Tip: You can attach additional document here:'. There is a file selection area with 'No File Selected', a 'Browse' button, and an 'Upload' button. At the bottom right, there are 'Reject' and 'Cancel' buttons.

11. In the **Rejection Comment** box, enter your comment to confirm your rejection or negotiated price.

12. Once you reject the negotiation, the status changes to **Rejected**.

Round 1		Buyer Name:		Darshan Mishrikoti		Actions
Status: Rejected (01/14/2016 08:45 AM)						
Original Bid Value (INR):	38,736.00	Date of Modification:	01/14/2016			
Negotiated Bid Value (INR):	36,459.00	Time of Modification:	08:44 AM			
% Change in Bid Value:	-5.88					

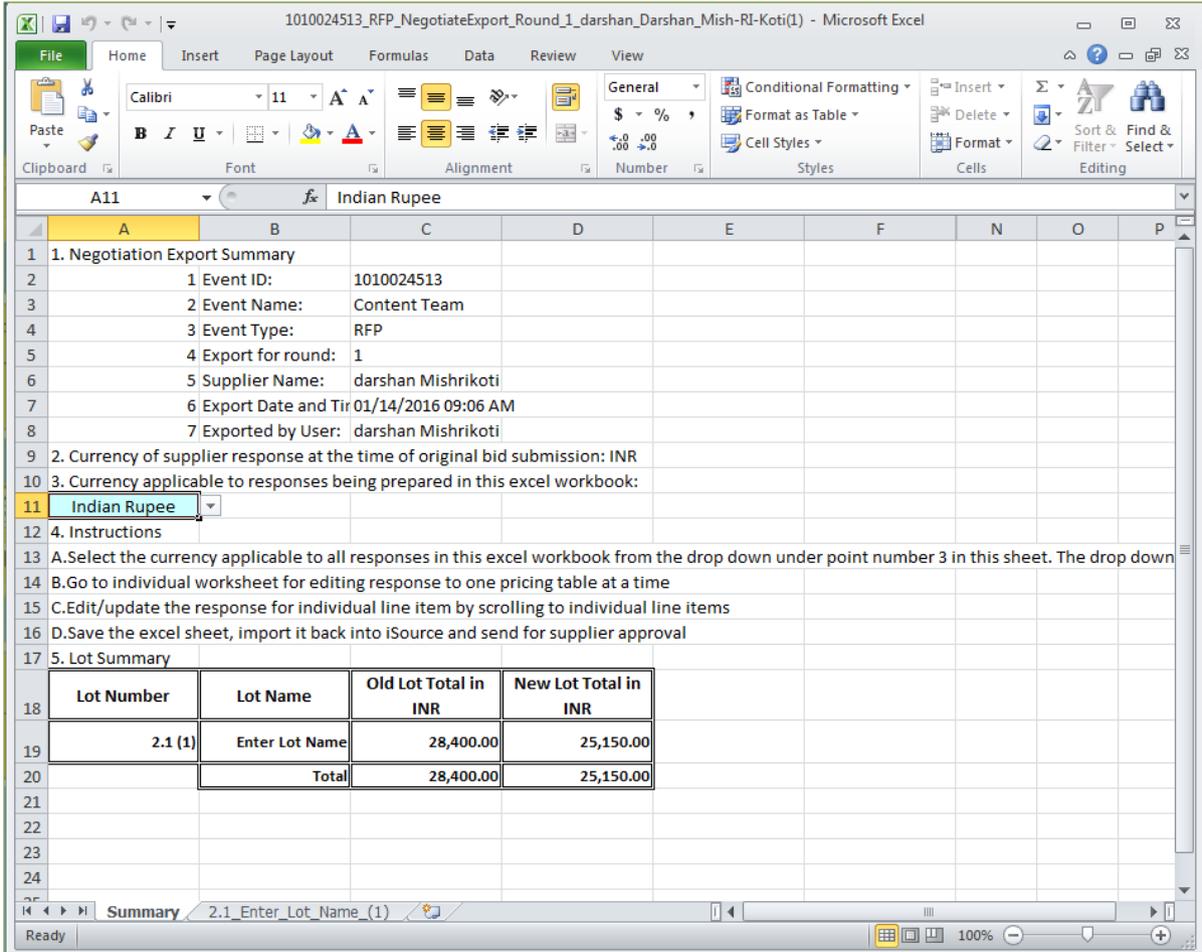
13. The status for the event on **My Events** page will get changed to **Negotiation Rejected**.



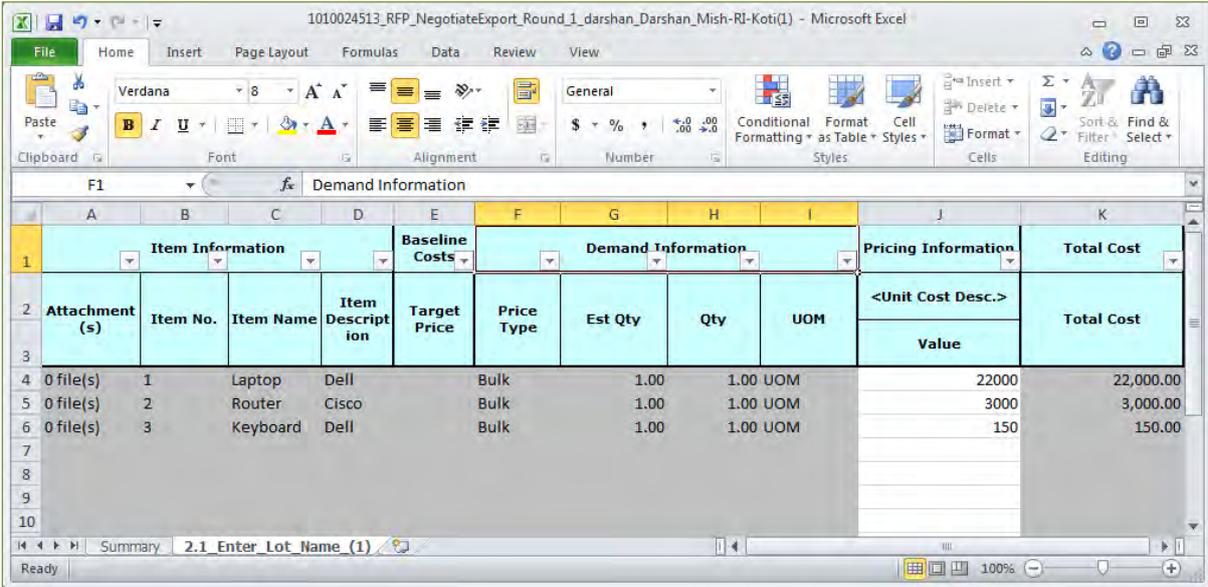
14. To export the negotiation details, click on **Export Details** from the **Actions** tab and save the file on your computer.

15. Open the .xlsx file to view the details.

16. You can refer the summary sheet for details about negotiated pricing.



17. The next tab in the spreadsheet displays details on negotiated baseline cost for items in the item table.



### 6.6.4 How Can I Respond to Auctions?

1. When a Buyer sends a bidding request for an auction, an auction event is created on the **My Events** page.

Event ID	Item	Owner	Open Date	Close Date	Type	Invite Type	Status	Action
1010024530	<a href="#">Content Auction</a>	Darshan Mahirkoti	01/14/2016 01:49 PM	01/21/2016 07:30 PM	Auction	Invited	Open	<a href="#">Enter Event</a>
1010024527	<a href="#">RFx Event</a>	Darshan Mahirkoti	01/14/2016 12:09 PM	01/14/2016 12:15 PM	RFP	Invited	Closed	<a href="#">View Event</a>
1010024513	<a href="#">Content Team</a>	Darshan Mahirkoti	01/14/2016 07:43 AM	01/14/2016 07:46 AM	RFP	Invited	Negotiation In Progress	<a href="#">Enter Event</a>
1010024512	<a href="#">RFI</a>	Shakir Khan	01/14/2016 07:15 AM	03/30/2016 07:30 PM	RFI	Broadcasted	Open	<a href="#">Enter Event</a>
1010024313	<a href="#">Content</a>	Darshan Mahirkoti	01/14/2016 08:29 AM	01/14/2016 08:42 AM	RFP	Invited	Negotiation Rejected	<a href="#">Enter Event</a>
1010024117	<a href="#">Keyboard</a>	Shakir Khan	01/14/2016 05:55 AM	01/30/2016 07:30 PM	RFI	Broadcasted	Open	<a href="#">Enter Event</a>
1010024114	<a href="#">LED screens</a>	Shakir Khan	01/12/2016 03:15 PM	01/13/2016 08:30 AM	RFI	Broadcasted	Closed	<a href="#">View Event</a>
1010024112	<a href="#">Optical Mouse</a>	Darshan Mahirkoti	01/12/2016 09:00 AM	01/13/2016 11:56 AM	RFP	Invited	Negotiation Closed	<a href="#">View Event</a>
1010022650	<a href="#">Water Purifier</a>	teoh training2	10/29/2015 06:28 AM	10/29/2015 06:48 AM	RFQ	Broadcasted	Closed	<a href="#">View Event</a>
1010021403	<a href="#">Coffee Machine</a>	Shakir Khan	09/25/2015 01:40 PM	09/29/2015 10:27 AM	RFI	Broadcasted	Closed	<a href="#">View Event</a>

2. Select the **Auction** you want to join, and then click **Enter Event**.

Follow the steps from [Enter an Event](#).

### 6.6.5 How to Join Bidding?

1. Click on **Join Bidding** in the **Supplier Checklist** section.

**Supplier Checklist**

- Confirm Participation
- Prepare Response
- Submit Response
- Join Bidding**

**Content Auction**  
 Submit responses for all the non-pricing sections in the event.

1.0 Non-Pricing Decision Factors  
 Status: OPEN  
 Type: Question

Completion Status: (1/1 (Mandatory), 2/2 (Optional))  
 Submitted: 01/14/2016 01:58 PM

Time Remaining for Auction to Start: 20:29:45

[Go to eForum \(0 New\)](#)

[View Response](#)

[Submit Response](#)

**AUCTION Summary**  
 Status: Open

**NON-PRICING TIMINGS**  
 Open Date: 01/14/2016 01:49 PM  
 Close Date: 01/15/2016 10:30 AM

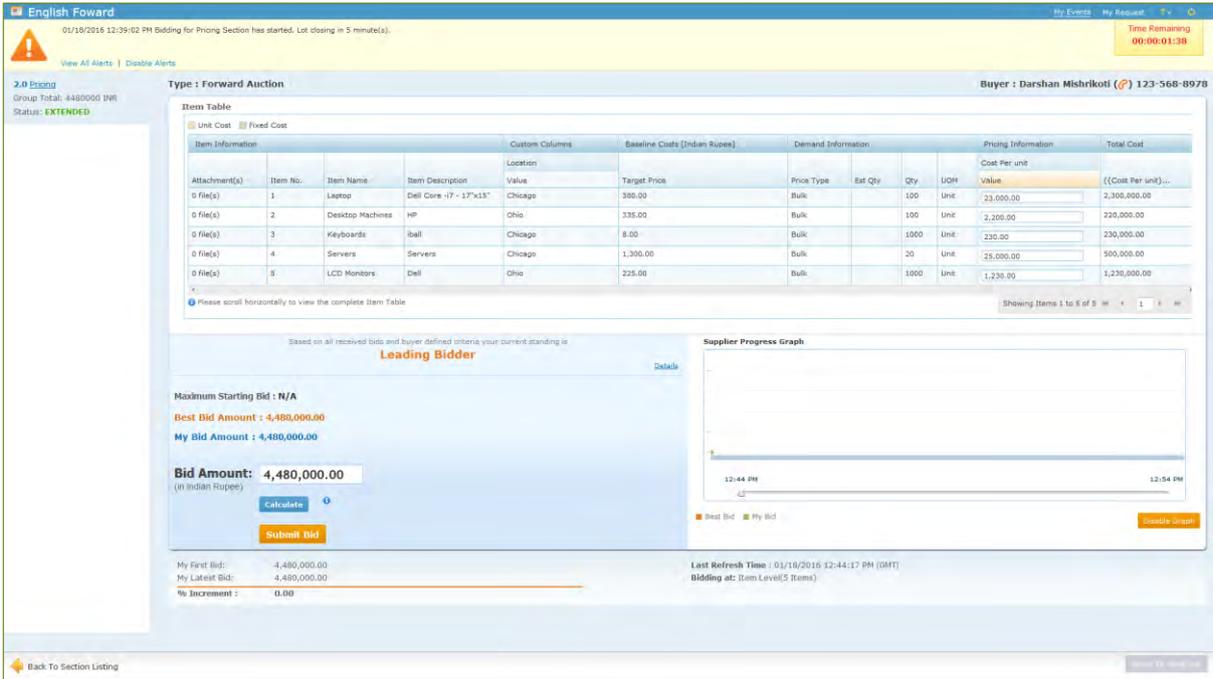
**PRICING TIMINGS**  
 Open Time: 02/14/2016 01:49 PM  
 Start Time: 01/15/2016 10:30 AM  
 Close Time: N/A

Owner: Darshan Mahirkoti  
 Contact: 123-568-8978

2. Type of the auction can be either **English Auction**, **Dutch Auction**, or **Japanese Auction**.
3. In English Auction under **General Auction Settings**, there are two auction types:

Option	Description
<b>Forward Auction</b>	In forward auction, bidding starts at minimum acceptable price and increases with every new bid by a fix increment.
<b>Reverse Auction</b>	In reverse auction, bidding starts at acceptable price and decreases with every new bid by a fix decrement.

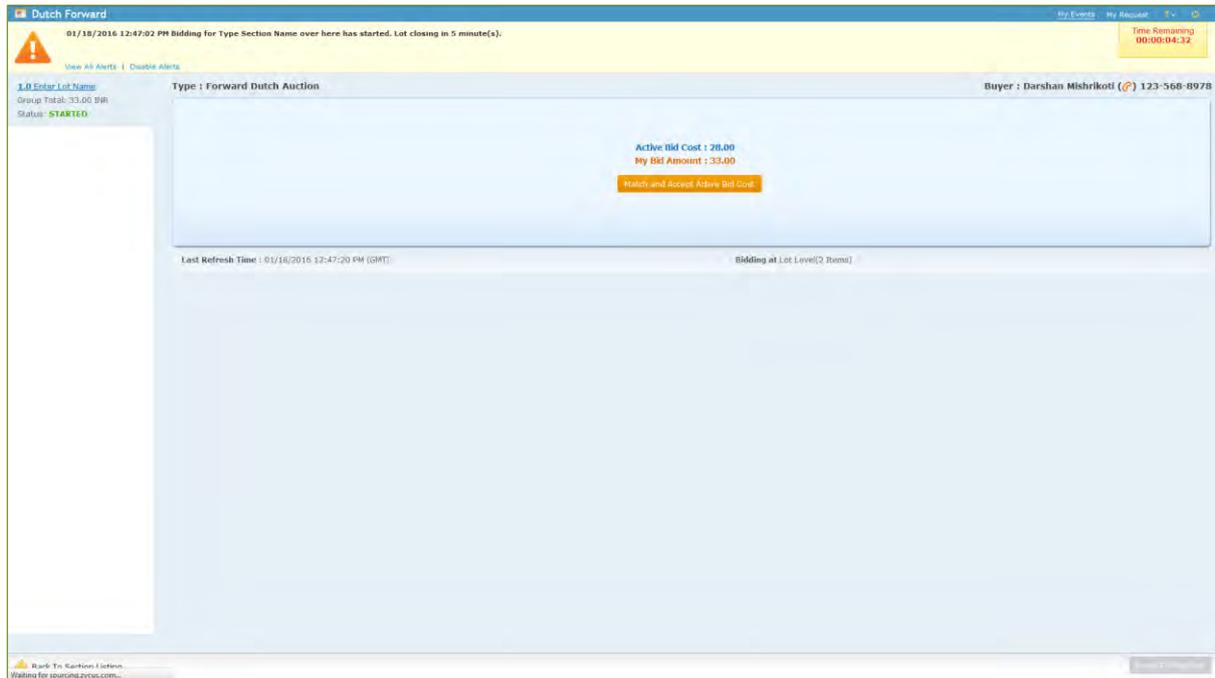
4. After you click on **Join Bidding**, the **Forward Auction** page is displayed:



5. In **Dutch Auction**, under **General Dutch Auction Settings**, there are two auction types:

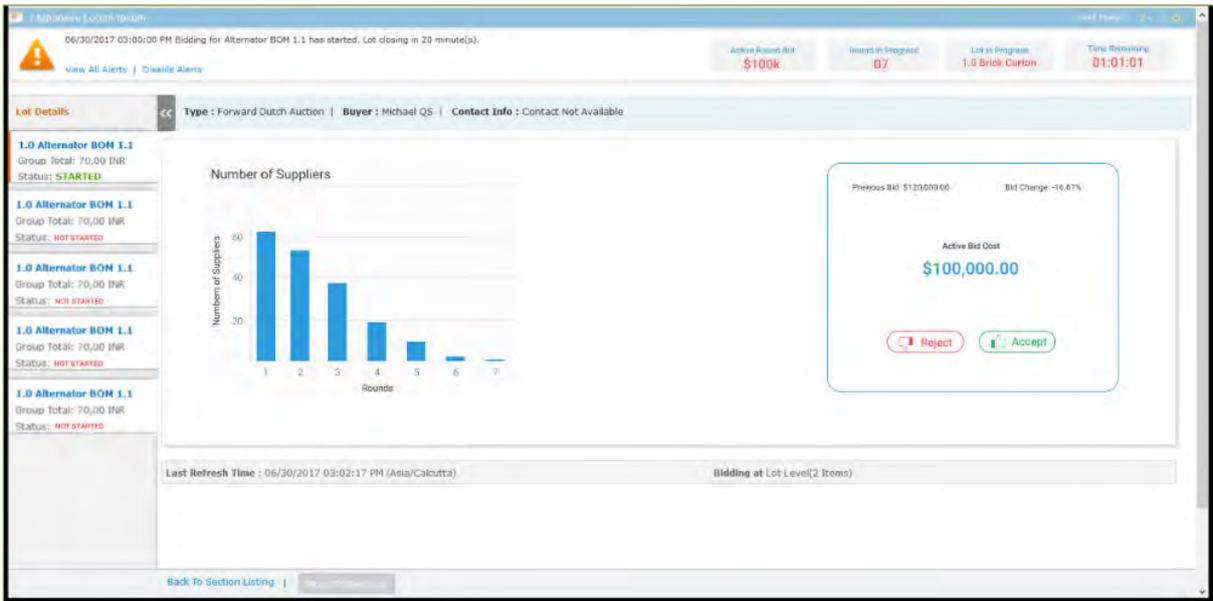
Option	Description
<b>Forward Dutch Auction</b>	In Forward Dutch auction, buyer increases the cost, till supplier accepts the active bid cost.
<b>Reverse Dutch Auction</b>	In Reverse Dutch auction, buyer reduces the cost, till a supplier accepts the active bid cost.

6. After you click on **Join Bidding**, the **Dutch Forward Auction** page is displayed:



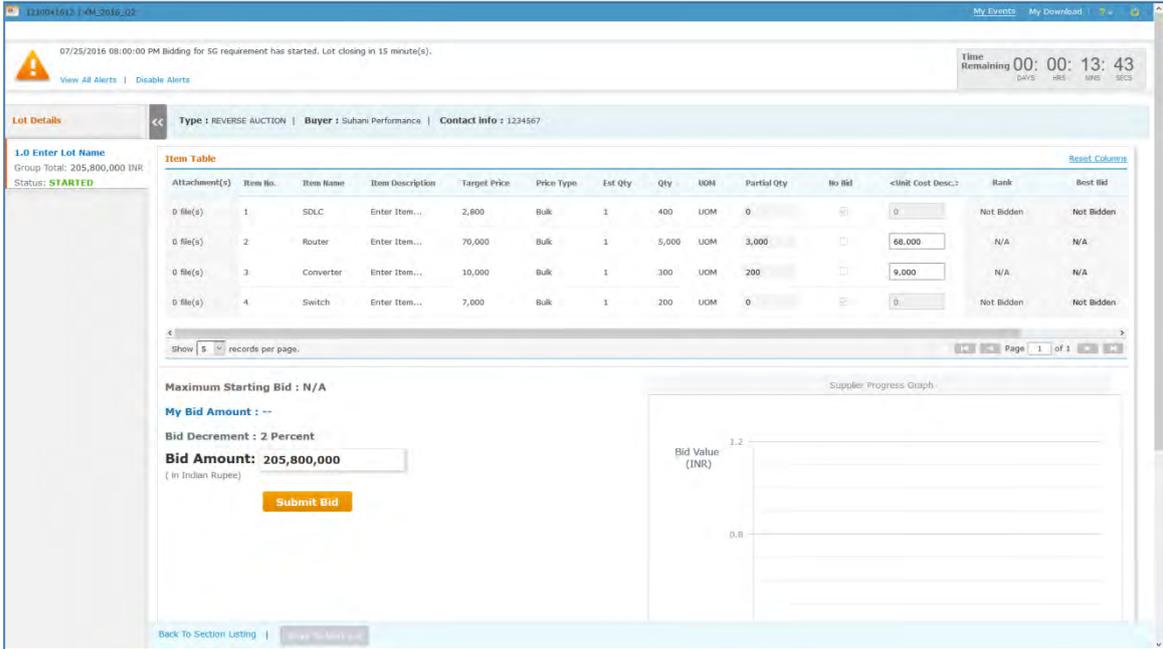
7. In **Japanese Auction**, under **General Japanese Auction Settings**, there are two auction types:

Option	Description
<b>Forward Dutch Auction</b>	In forward auction, bidding starts at minimum acceptable price and increases with every new bid by a fix/variable increment. This is usually used for selling a commodity.
<b>Reverse Dutch Auction</b>	In reverse auction, bidding starts at acceptable price and decreases with every new bid by a fix/variable decrement. This is usually used for procuring a commodity.

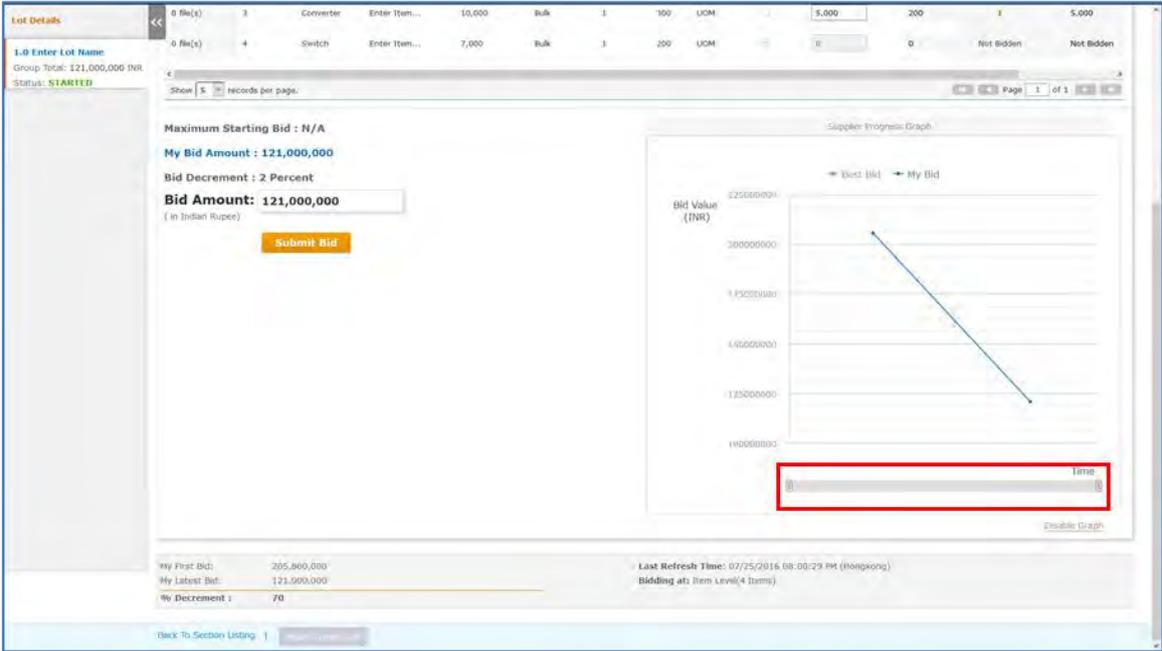


6.6.5.2 Line Level Bidding

1. When the bidding is at the line level, the following page will be displayed:



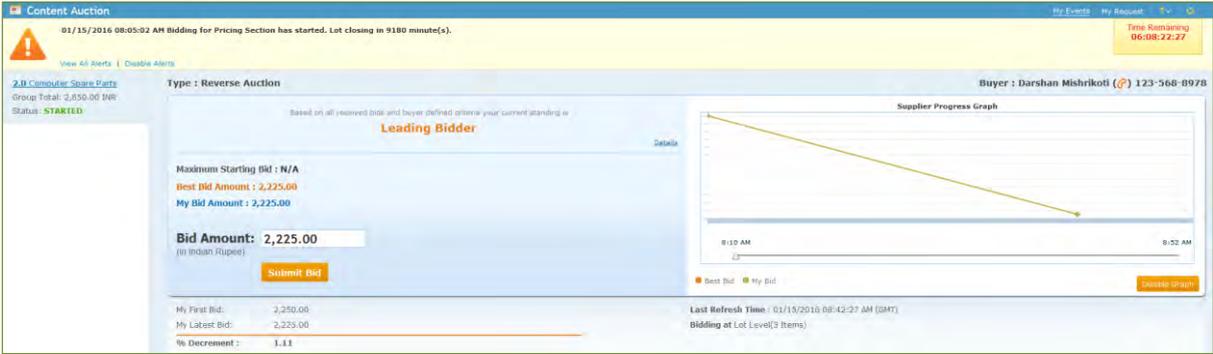
- 2. Enter your bid amount at line level and click on **Submit** to submit the bid.
- 3. The graph will show your bidding history since the start of auction.



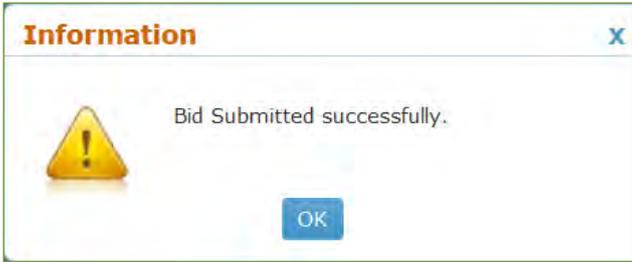
4. To get information for particular time period, use the scroll bar (*highlighted*) to narrow down the time frame.

**6.6.5.3 Lot Level Bidding**

1. If the bidding is at Lot Level, the following page will be displayed:



2. After changing the price, click on **Submit Bid**. The following popup will be displayed:



**6.6.5.4 Rearranging the Columns**

1. The columns in the bidding item table can be rearranged as per supplier’s requirement.
2. Use the  icon to rearrange the columns.

Attachment(s)	Item No.	Item Name	Item Description	Target Price	Price Type	Partial Qty	Est Qty	Qty	UOM	No Bid	<Unit Cost Desc.>	Rank	Best Bid
0 file(s)	1	SDLC	Enter Item...	2,800	Bulk	0	1	400	UOM		0	Not Bidden	Not Bidden
0 file(s)	2	Router	Enter Item...	70,000	Bulk	3,000	1	5,000	UOM		68,000	N/A	N/A
0 file(s)	3	Converter	Enter Item...	10,000	Bulk	200	1	300	UOM		9,000	N/A	N/A
0 file(s)	4	Switch	Enter Item...	7,000	Bulk	0	1	200	UOM		0	Not Bidden	Not Bidden

3. Shown below are the columns of item table rearranged:

Attachment(s)	Item No.	Item Name	Item Description	Target Price	Price Type	Est Qty	Qty	UOM	No Bid	<Unit Cost Desc.>	Partial Qty	Rank	Best Bid
0 file(s)	1	SDLC	Enter Item...	2,800	Bulk	1	400	UOM		0	0	Not Bidden	Not Bidden
0 file(s)	2	Router	Enter Item...	70,000	Bulk	1	5,000	UOM		68,000	3,000	N/A	N/A
0 file(s)	3	Converter	Enter Item...	10,000	Bulk	1	300	UOM		9,000	200	N/A	N/A
0 file(s)	4	Switch	Enter Item...	7,000	Bulk	1	200	UOM		0	0	Not Bidden	Not Bidden

4. Click **Reset Column** (*highlighted*) to undo rearranging the columns.

**6.6.5.5 Ranks**

The supplier ranks will be visible in the item table. Rank will be available per line item.

Attachment(s)	Item No.	Item Name	Item Description	Target Price	Price Type	Est Qty	Qty	UOM	No Bid	<Unit Cost Desc.>	Partial Qty	Rank	Best Bid
0 file(s)	1	SDLC	Enter Item...	2,800	Bulk	1	400	UOM		0	0	Not Bidden	Not Bidden
0 file(s)	2	Router	Enter Item...	70,000	Bulk	1	5,000	UOM		68,000	3,000	1	68,000
0 file(s)	3	Converter	Enter Item...	10,000	Bulk	1	300	UOM		9,000	200	1	9,000
0 file(s)	4	Switch	Enter Item...	7,000	Bulk	1	200	UOM		0	0	Not Bidden	Not Bidden

### 6.6.5.6 Japanese Auction Bidding Page

Shown below is the overview of the Japanese Auction page.

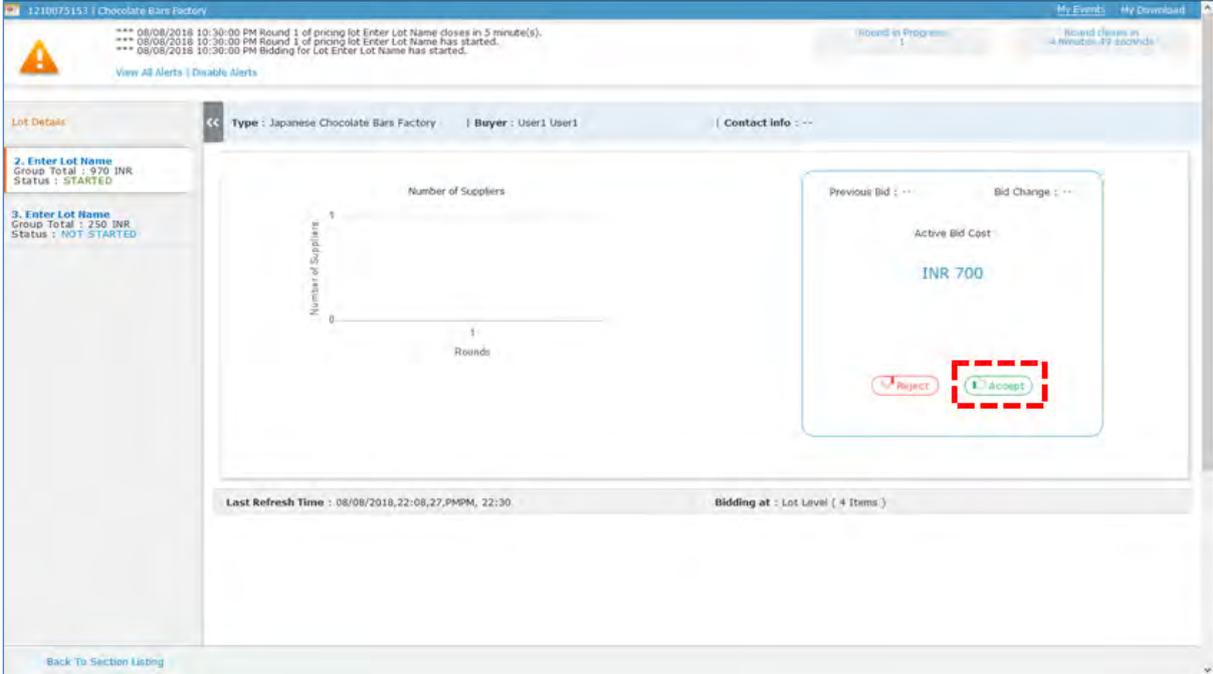
The screenshot shows the Japanese Auction Bidding Page for 'Chocolate Bars Factory'. It includes a top navigation bar, a central bidding area, and a bottom section for lot details. Callout boxes provide the following information:

- Top Left:** Displays the current round for the ongoing lot.
- Top Right:** This box will display the time remaining for: Ongoing Round: "Time Remaining for Round". Latency period between rounds: "Time Remaining before Next Round". Latency period between lots: "Time Remaining before Next Lot".
- Supplier Acceptance Trends:** This is the **Supplier Acceptance Trends**. You may or may not be able to view this based on the settings configured by your buyer. This box will allow you to see the number of other suppliers in current and past rounds. (The chart shows 1 supplier in Round 1 and 0 in Round 2).
- Supplier Acceptance Box:** This is the **Supplier Acceptance Box** and consists of the following information:
  - Previous round's bid Value.
  - The Bid Change percentage will be the increment/decrement percentage in the round's bid value as compared to the previous round's bid value.
  - The present round's bid value.

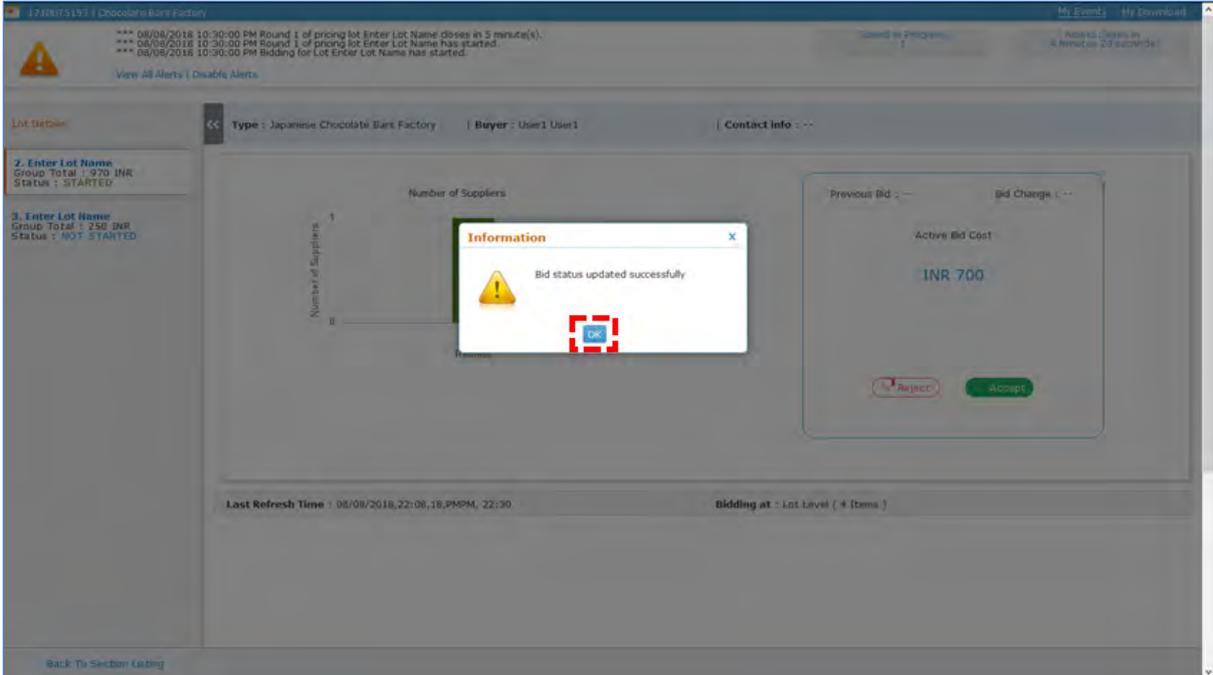
Japanese Auctions are carried out in lots. Every pricing lot in an event can have 'n' number of lots. For a given pricing lot, let's take a look at how you can bid.

### Responding to the Rounds of Pricing Lot

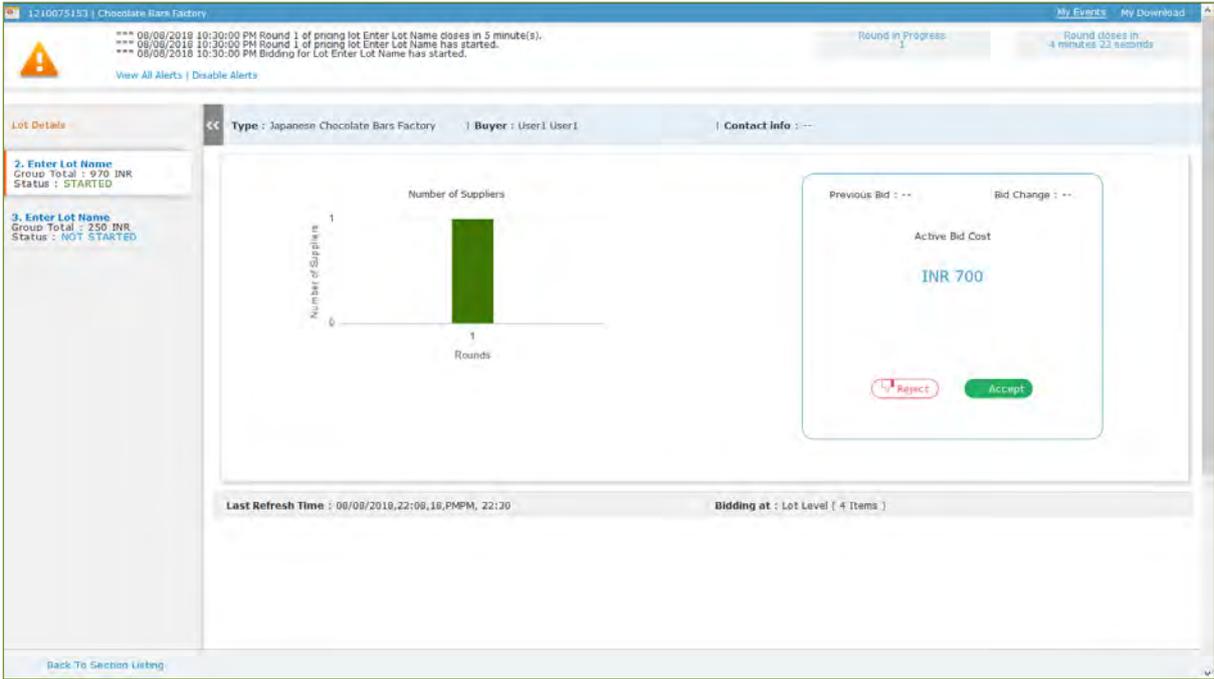
- 1. The auction will progress one lot at a time. The auctions, once started will provide you with an **Active Bid Cost** for a lot whose response you have already submitted. Reviewing the **Bid Cost** and you can choose to **Accept** or **Reject** it.



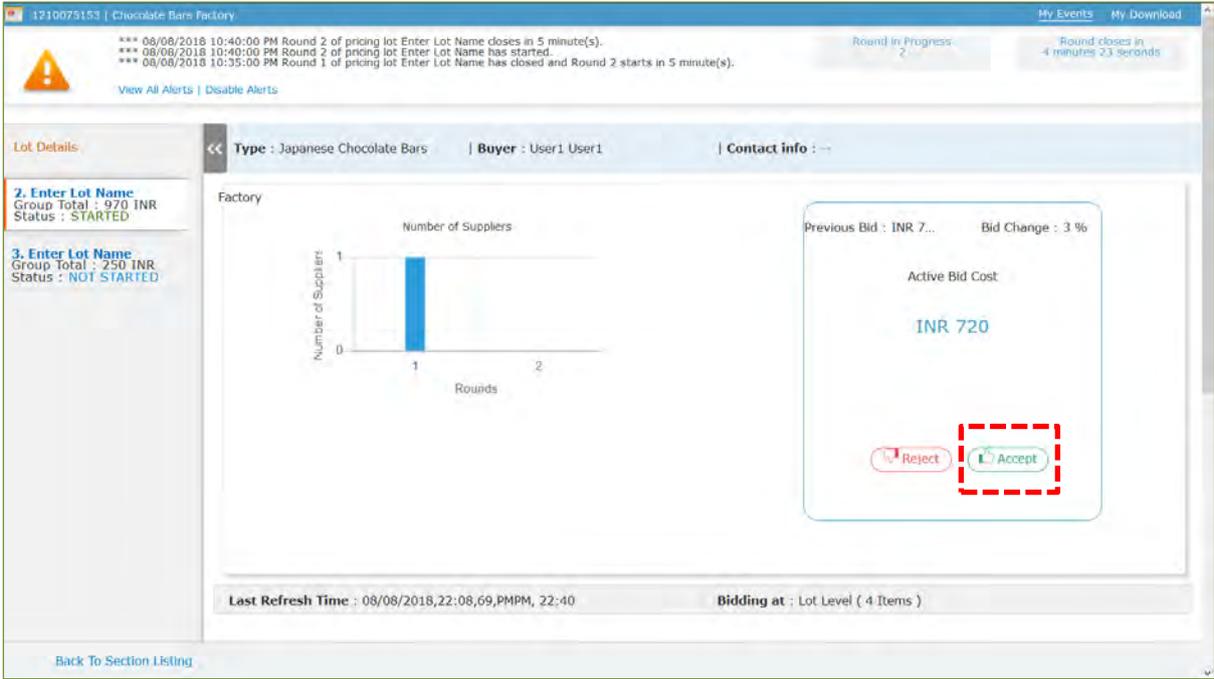
- 2. Upon acceptance, you will see the following popup. Click **OK**.



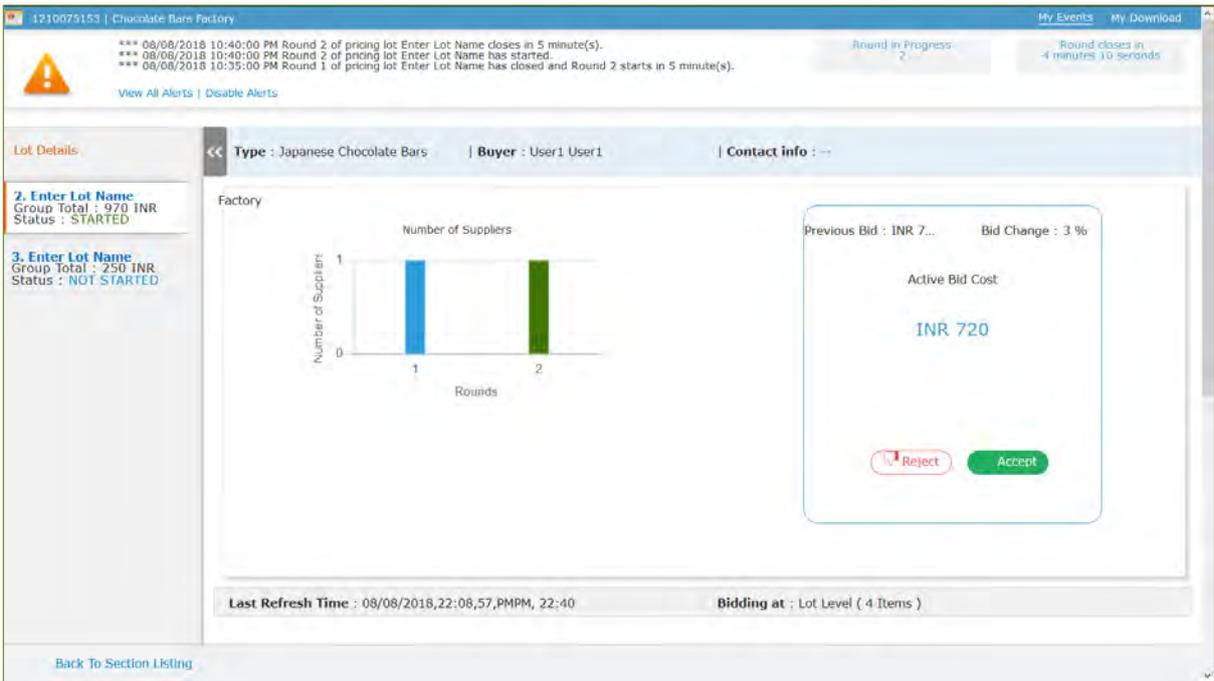
3. Your bid will be recorded and you will be able to proceed to the next round when it becomes active.



4. Moving on the next round, similar to round 1, you can review the **Active Bid Cost** and choose to **Accept** or **Reject** the Bid. In the **Supplier Acceptance Trends** graph, the blue color bar signifies the last round.

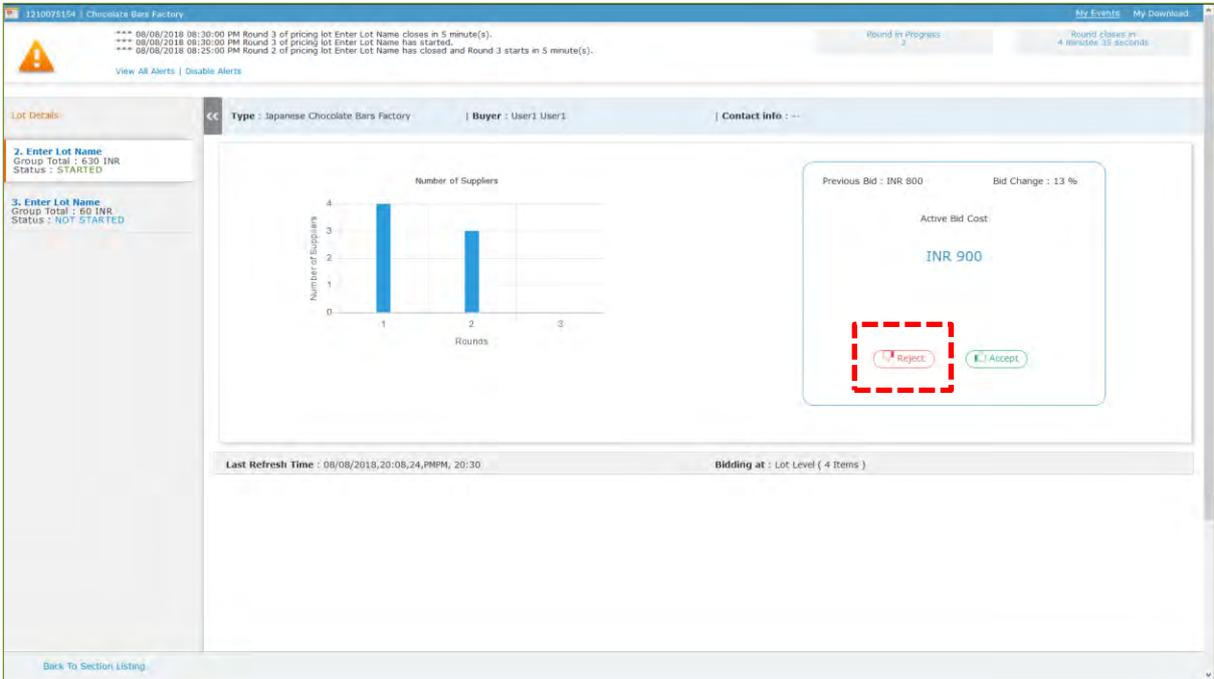


5. Once you have accepted your bid, you can wait for the next round to become active to participate. Here the **Green** bar in the **Supplier Acceptance Trends** graph denotes on-going event.

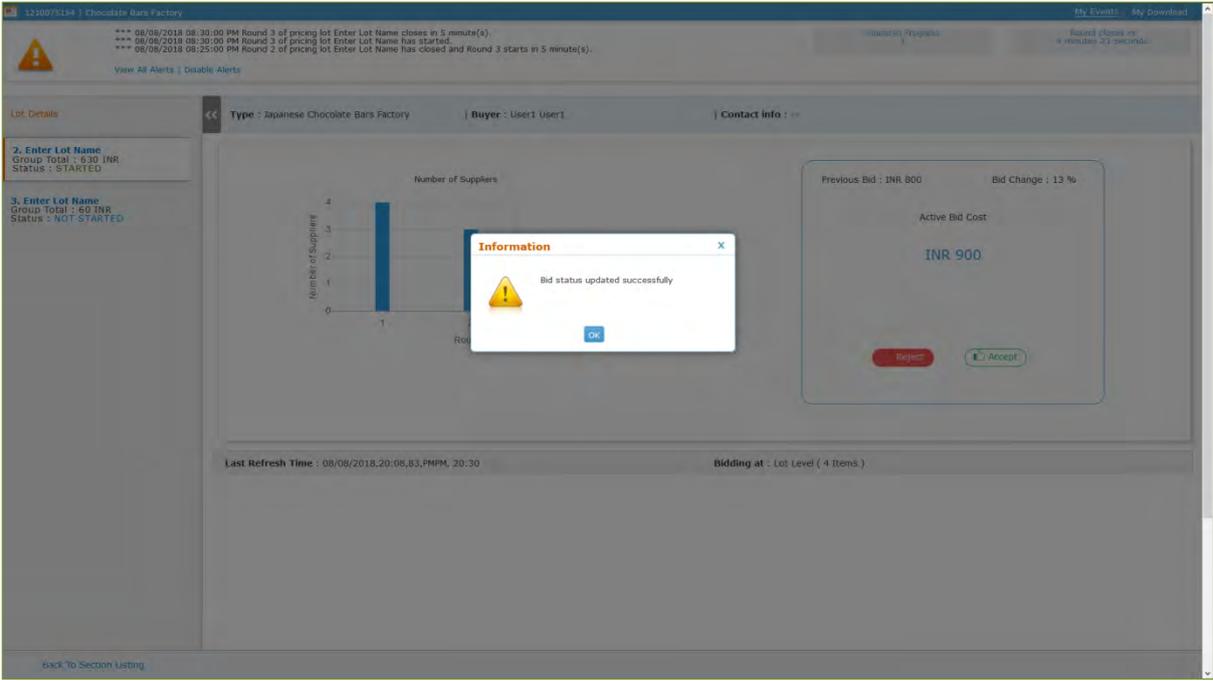


### In case of rejecting an Active Bid Cost

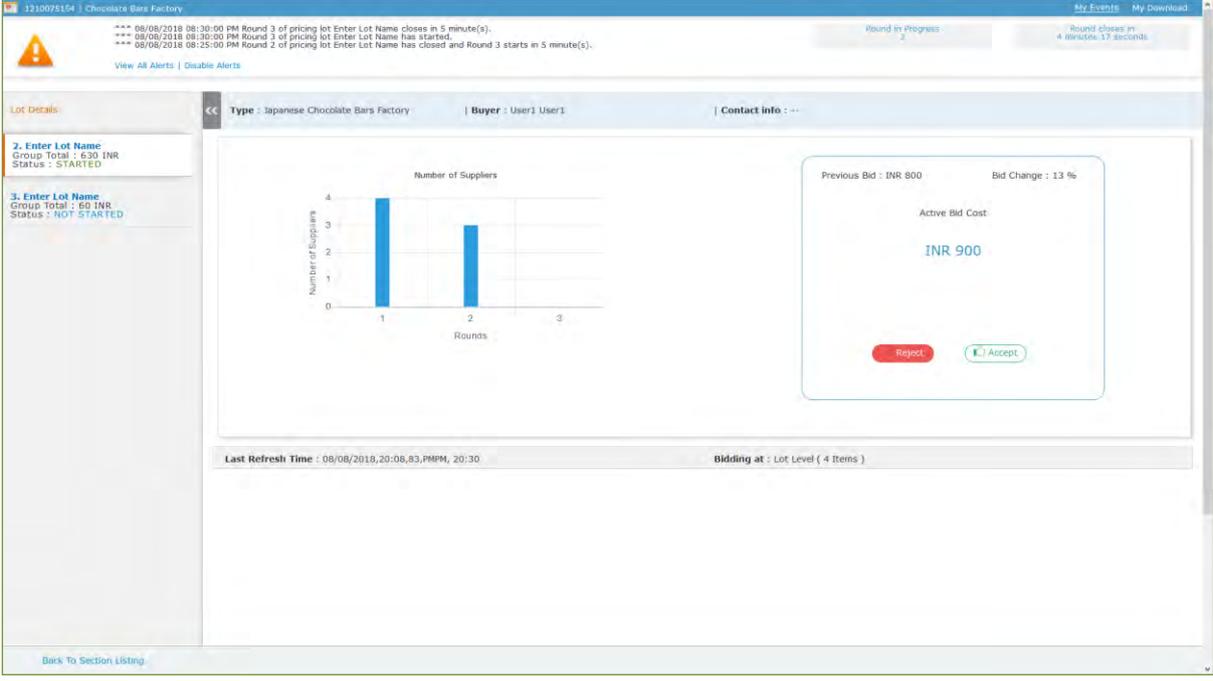
1. If you do not want to bid for any round, you can choose to **Reject** the bid. However please note, once rejected, you will not be allowed to enter any succeeding lots.



2. Clicking **Reject**, you will see the following popup. Click **OK**.



3. In the scenario you have already rejected the bid even with the time remaining in the round to close, you can change his selection to **'Accepted'**. But once you have changed it to **'Accepted'**, you cannot change it back to **'Rejected'**.



## 6.6.6 How to Perform Bid Reconciliation?

1. Bid reconciliation is performed at lot level when the auction status is changed to **Closed**. Bid reconciliation is initiated by the buyer.

1010025111	<a href="#">New Auction</a>	Darshan Mishrikoti	01/18/2016 07:13 AM	01/18/2016 07:45 AM	Auction	Invited	Closed	<a href="#">View Event</a>
------------	-----------------------------	--------------------	---------------------	---------------------	---------	---------	--------	----------------------------

2. When buyer initiates **Bid Reconciliation**, you can view that in the Status of the auction as **Bid Reco Open**.

Event ID	Name	Owner	Open Date	Close Date	Type	Invite Type	Status	Action
1010025113	<a href="#">Office Auction</a>	Darshan Mishrikoti	01/18/2016 09:39 AM	01/18/2016 09:41 AM	Auction	Invited	Bid Reco Open	<a href="#">Enter Event</a>
1010025111	<a href="#">New Auction</a>	Darshan Mishrikoti	01/18/2016 07:13 AM	01/18/2016 07:45 AM	Auction	Invited	Closed	<a href="#">View Event</a>
1010024720	<a href="#">Metal Scrap Auction</a>	Darshan Mishrikoti	01/15/2016 10:47 AM	01/18/2016 09:38 AM	Auction	Invited	Bidding In Progress	<a href="#">Enter Event</a>
1010024717	<a href="#">Steel Auction</a>	Darshan Mishrikoti	01/15/2016 08:51 AM	01/18/2016 09:37 AM	Auction	Invited	Bidding In Progress	<a href="#">Enter Event</a>
1010024530	<a href="#">Content Auction</a>	Darshan Mishrikoti	01/14/2016 01:49 PM	01/21/2016 05:05 PM	Auction	Invited	Bidding In Progress	<a href="#">Enter Event</a>
1010024513	<a href="#">Content Team</a>	Darshan Mishrikoti	01/14/2016 07:43 AM	01/14/2016 07:46 AM	RFP	Invited	Negotiation In Progress	<a href="#">Enter Event</a>
1010024512	<a href="#">Bidsite RFI 001</a>	Shakir Khan	01/14/2016 07:15 AM	03/30/2016 07:30 PM	RFI	Broadcasted	Open	<a href="#">Enter Event</a>
1010024313	<a href="#">Content</a>	Darshan Mishrikoti	01/14/2016 08:29 AM	01/14/2016 08:42 AM	RFP	Invited	Negotiation Rejected	<a href="#">Enter Event</a>
1010024117	<a href="#">Bids_c</a>	Shakir Khan	01/14/2016 05:35 AM	01/30/2016 07:30 PM	RFI	Broadcasted	Open	<a href="#">Enter Event</a>
1010024114	<a href="#">Tech-support training 12-01-2015</a>	Shakir Khan	01/12/2016 03:15 PM	01/13/2016 08:30 AM	RFI	Broadcasted	Closed	<a href="#">View Event</a>

3. Click on **Enter Event**.
4. On entering the event, the following page will be displayed:

**Office Auction**  
Prepare Reconciled bids for all pricing sections.

**Supplier Checklist**

- Confirm Participation
- View Responses
- Bid Summary
- Bid Reconciliation  
Prepare Reconciled bids for all pricing sections.

**1.0 Type Section Name over here**  
Type : Reverse Auction  
Status : **Bid Reco Open**  
Bidding : Lot Level

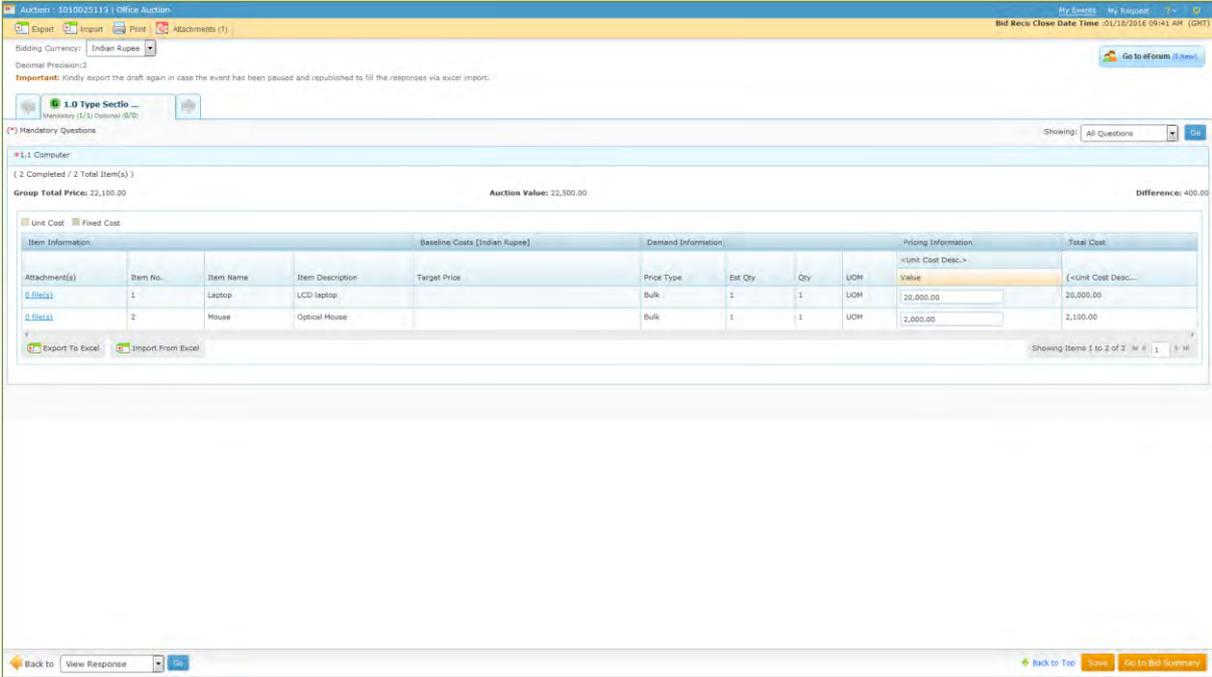
**Group Total Price : 23,100.00 Indian Rupee**  
Completion Status : Bid Reconciliation Incomplete  
Bid Reco Time Details :  
Start : 01/18/2016 09:39 AM  
Close : 01/18/2016 09:41 AM

[Prepare Bid Response](#)

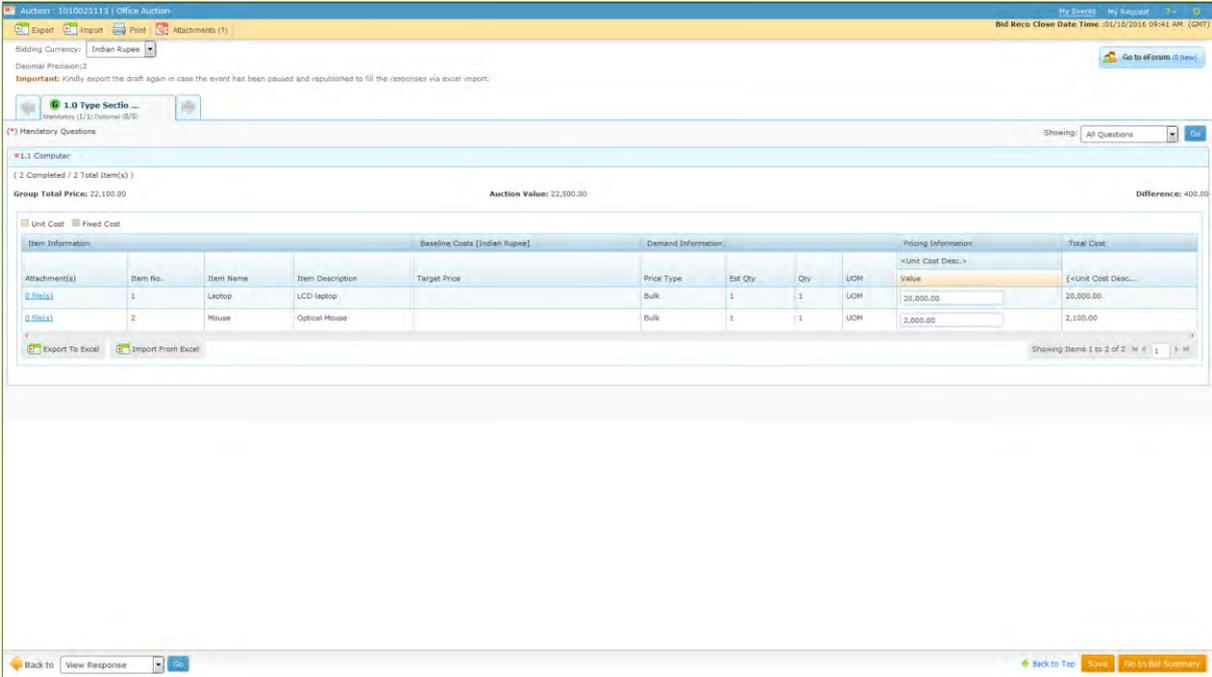
**Time Remaining for Bid Reconciliation to Close: 00:00:45**  
[Go to eForum](#)

5. Select **Bid Reconciliation** on the **Supplier Checklist**. You will be able to view the details about the **Bid Reco**.

6. Click on **Prepare Response**. Following page will be displayed:



7. Change the prices in **Pricing Information** and click on **Save**.



8. On saving revised price, a confirmation popup will appear. Click **OK**. The revised bid will be sent to the buyer.

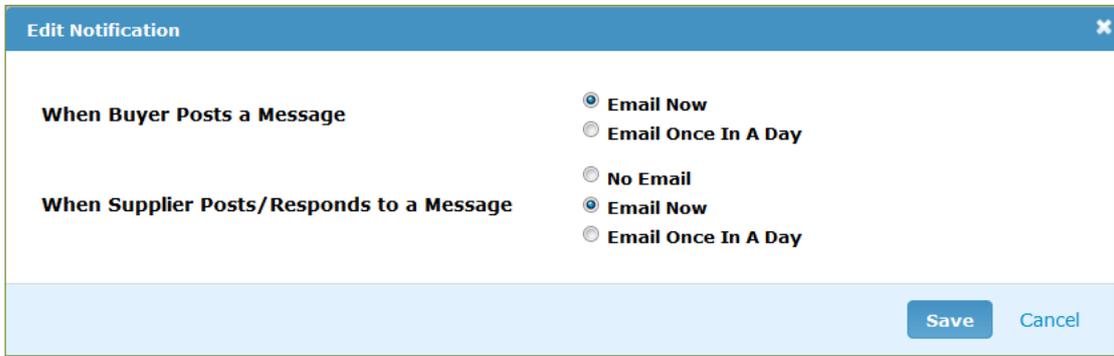


**6.6.7 From Where can I Access eForums?**

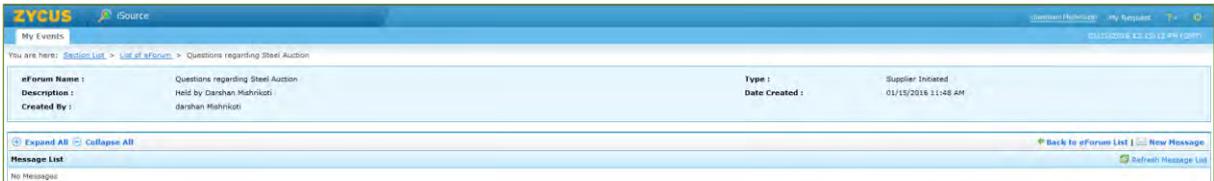
1. Click on **Go to eForum**. The following page will be displayed:



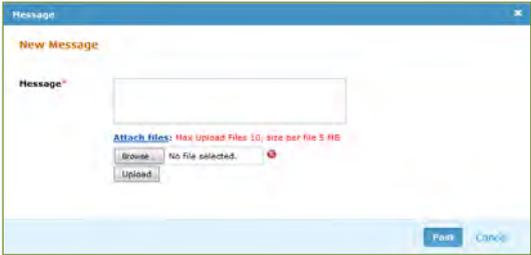
- 2. You can either initiate an eForum by clicking **New eForum** or visit an existing eForum created by a buyer.
- 3. Click **Edit Notification** to edit the notification that is sent to the buyer when you respond to the buyer’s message. The following popup will be displayed:



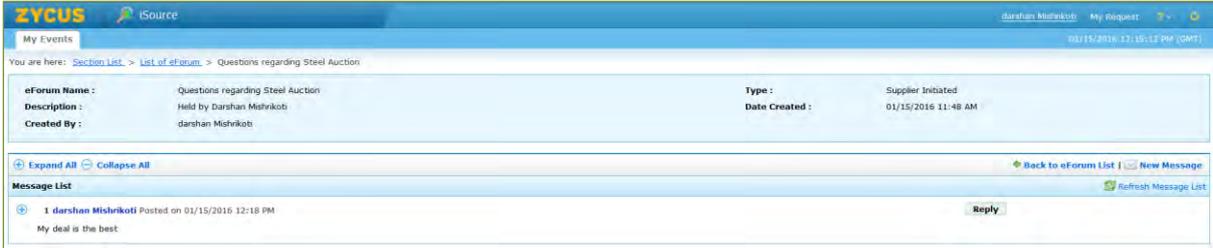
4. Select an **eForum** and click on **New Message**.



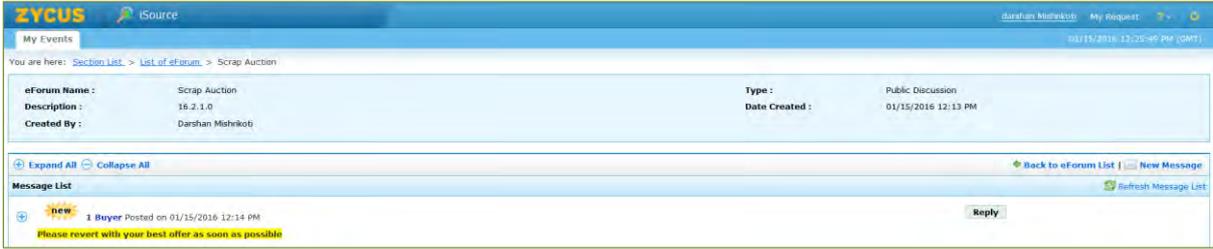
5. Following popup will be displayed. Write your message and click **Post**. Your message will be posted on eForum.



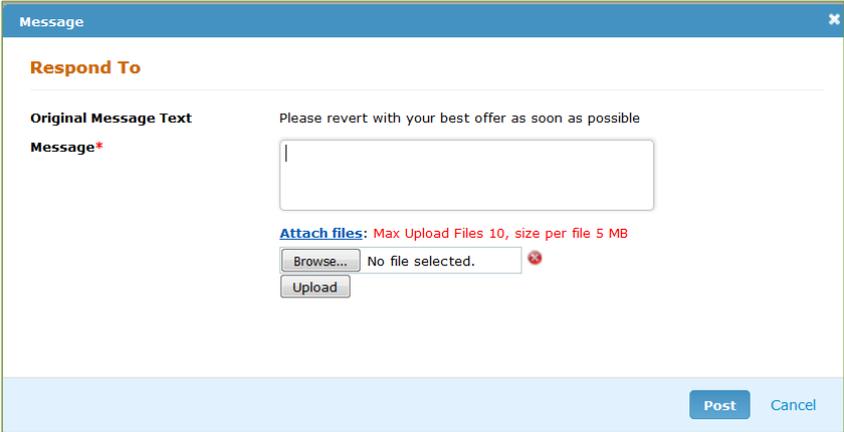
6. You will be able to see your message on the eForum.



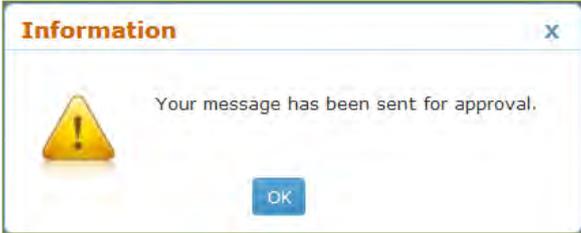
7. Click Reply.



8. **Respond To** popup will be displayed:



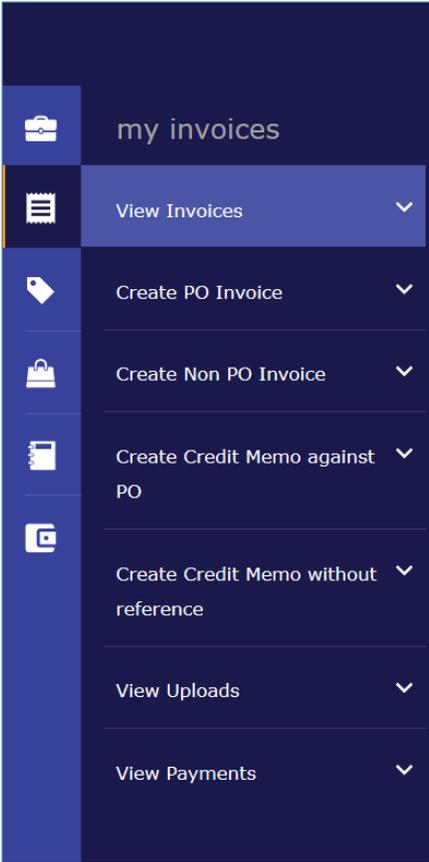
9. Type your message and click **Post**. The following popup will be displayed:



## 6.7 My Invoices

**NOTE:** The above-mentioned menu may or may not be available based on the access provided to you by customer.

My orders option allows the user to view orders received from the customers.



The **My Invoices** tab consists of three sub tabs:

- 1. View Invoices
- 2. Create PO Invoice
- 3. Create Non PO Invoice

## 6.7.1 How to View Invoices?

Using the **View Invoices** sub tab, the user can view invoices, PO and Non-PO Invoices created using ZSN.

The User can perform the following operations using the **View Invoices** sub tab:

1. Search Invoices
2. Filter Invoices
3. Sort Invoices
4. View Invoices
5. Edit Invoices

### 6.7.1.1 *Searching Invoices*

You can search for an invoice by entering the Invoice Number, PO Number or Customer name in the **Search** section.

Enter the required search term in the Search Bar and click  or press ENTER.

6.7.1.2 Filtering Invoices

You can filter the invoices based on the following parameters:

- **Invoice status:** Select a status to view the invoices under that particular status.

Invoice status

- View All
- Draft
- Submitted
- Approved
- Paid
- Partially Paid
- Not Paid
- Cancelled
- Rejected
- Delivered
- In Progress
- Ready for apportionment
- Fully apportioned
- Parked
- Created

- **Document Type:** Select whether you want to view **Invoice**, **Credit Memo**, or both.

Document Type

- View All
- Invoice
- Credit Memo

- **Document Origin:** Select if you want to view the invoice or credit memo created by you or your buyer, or both.

A filter form titled "Document Origin" with a dropdown arrow icon. It contains three checkboxes: "View All", "Supplier", and "Buyer".

- **Overdue:** To view invoices whose payments are Overdue.

A filter form titled "Overdue" with a dropdown arrow icon. It contains one checkbox labeled "Overdue".

- **Invoiced between:** Select start and end date using the calendar icon to view invoices dated between the selected date ranges.

A filter form titled "Invoiced between" with a dropdown arrow icon. It contains two text input boxes, each with a calendar icon, separated by an ampersand (&).

- **Due Date between:** Select start and end date using the calendar icon to view invoices whose due date lies between the selected date ranges.

A filter form titled "Due Date between" with a dropdown arrow icon. It contains two text input boxes, each with a calendar icon, separated by an ampersand (&).

- **Amount:** Using the slider, select the start and end amount to view invoices whose amount lies in the selected amount range. **OR** Enter the start and end amount in the text boxes.

A filter form titled "Amount" with a dropdown arrow icon. It contains two text input boxes with values "\$ 0" and "\$ 2311889" separated by "to". Below the text boxes is a horizontal slider with orange handles.

Click **Filter** after selecting/enabling the required filters to filter the invoices.

Click **Clear Filters** to deactivate all filters and display all invoices.

### 6.7.1.3 *Sorting Invoices*

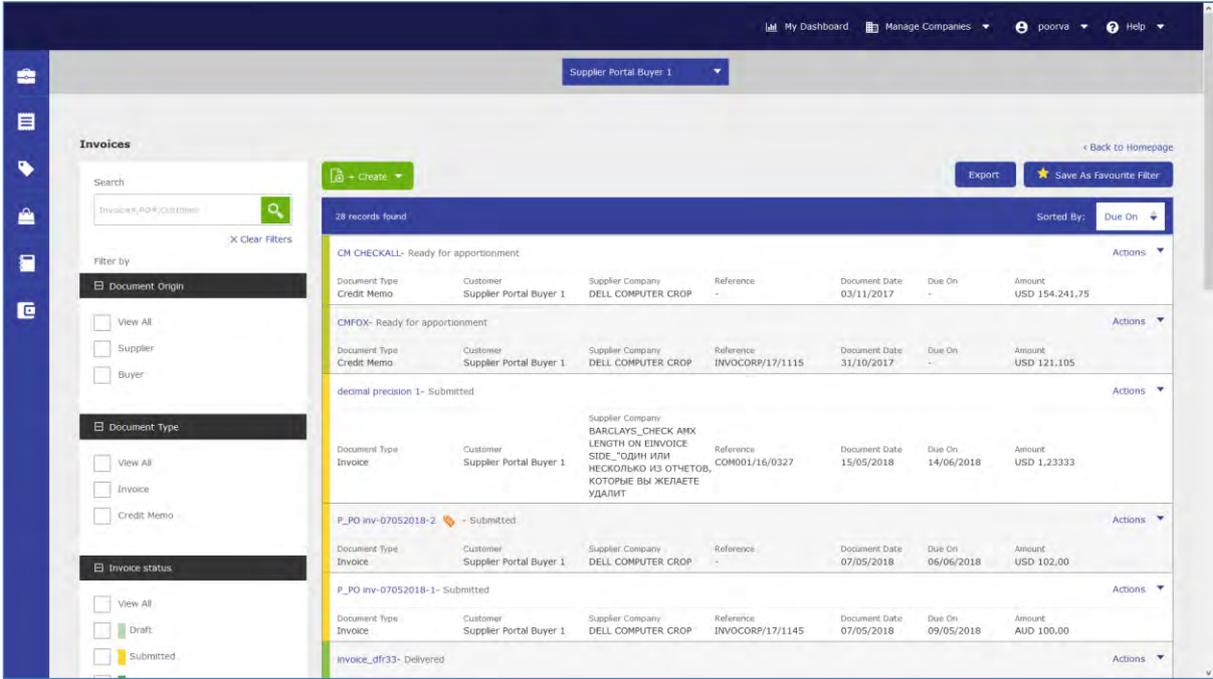
Besides the **Due Date** header, click on ▲ to sort the invoices in ascending order and click on ▼ to sort the invoices in descending order.



**6.7.1.4 Viewing Invoices**

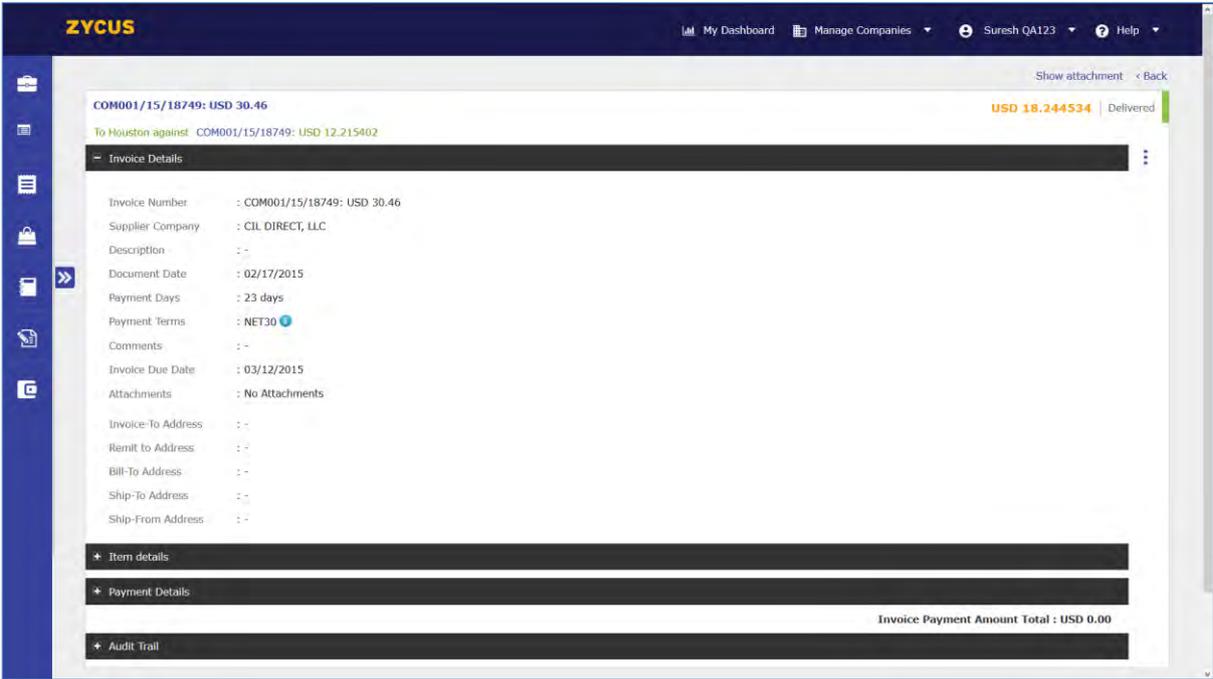
**To view a required Invoice:**

1. Navigate to the following location: Side Panel > **My Invoices** > **View Invoices** > Required Customer Company.
2. Look for the required invoice using the **Search**, **Filter** or **Sort** options.
3. For the required Invoice, click on the corresponding **Invoice Number**.

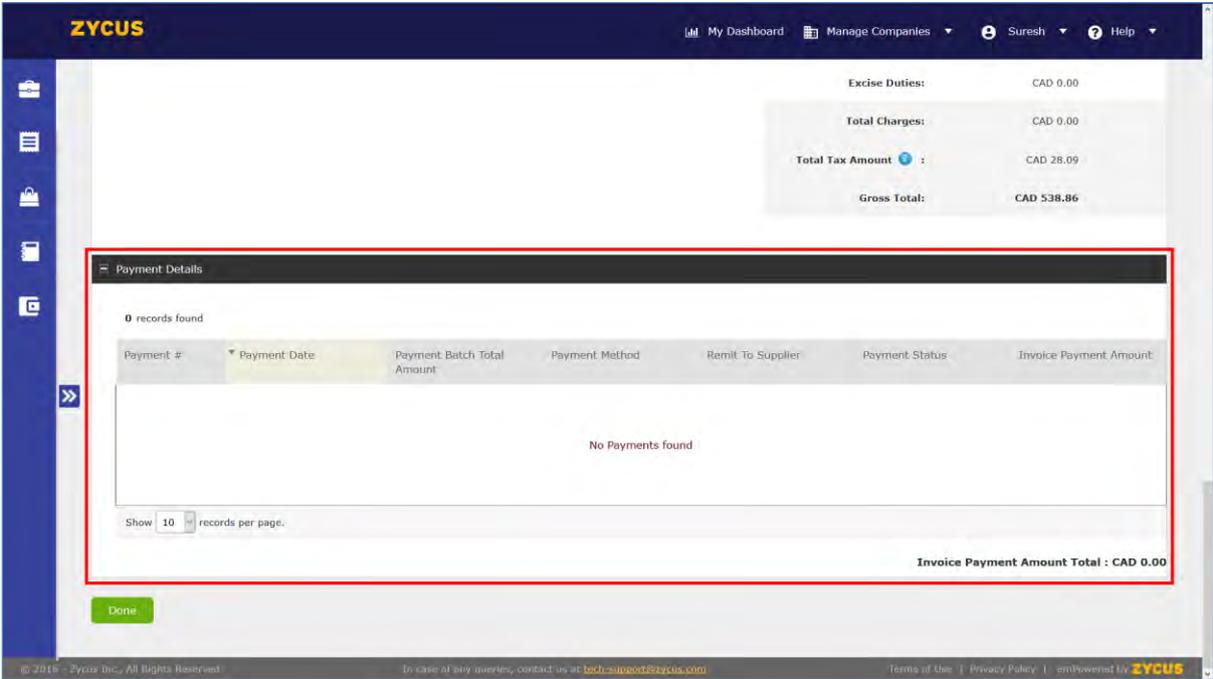


4. For Invoices that are editable, the **Update Invoices** page is displayed. Invoices that cannot be edited are only viewed.

5. Clicking the **Invoice Number**, you will land on the following page:



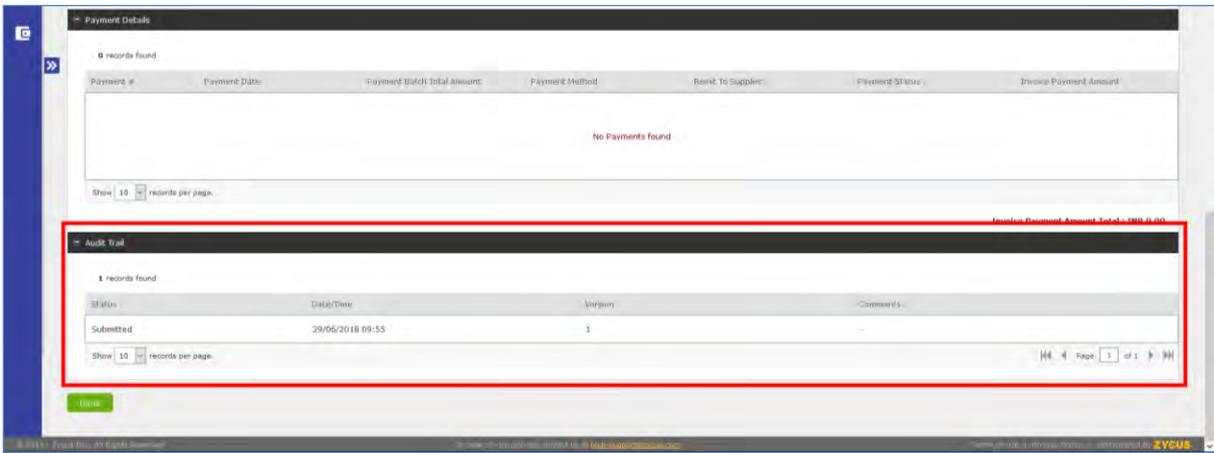
**Note:** On the **Invoice** details page, you will be able to view the payment details if any payment was made against an invoice.



### Audit Trail for Invoice and Credit Memo

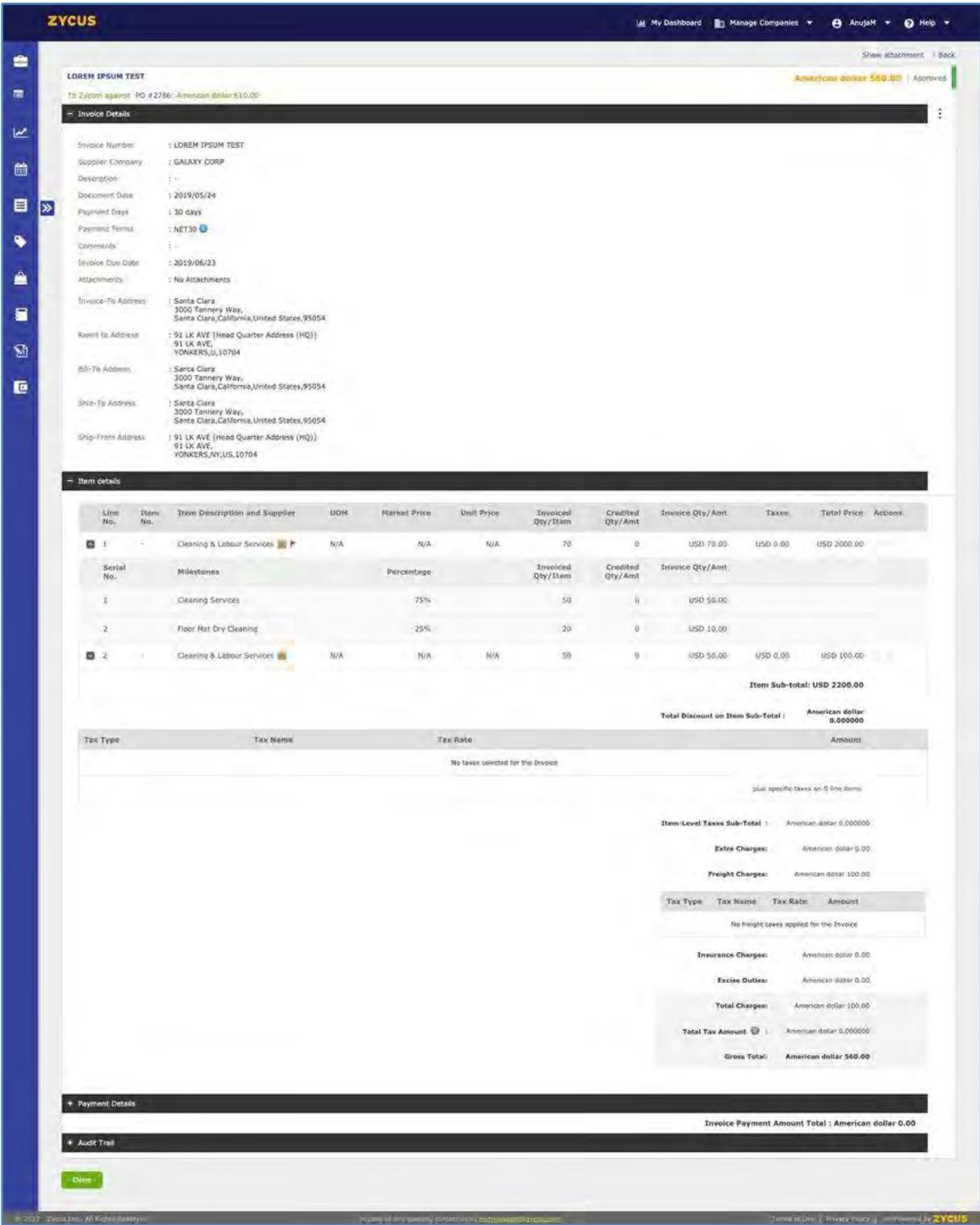
Audit trail is available at the bottom of the invoice/credit memo document. It will display all the status change history and version updates made to the invoice/credit memo. Audit trail will show the following information:

- Status
- Date/Time
- Version
- Comments



### Viewing Milestone Invoices

While viewing invoices with milestone items, suppliers will be able to view the milestone amount as shown below. The payments section will remain the same as payments are made at invoice level not milestone level.



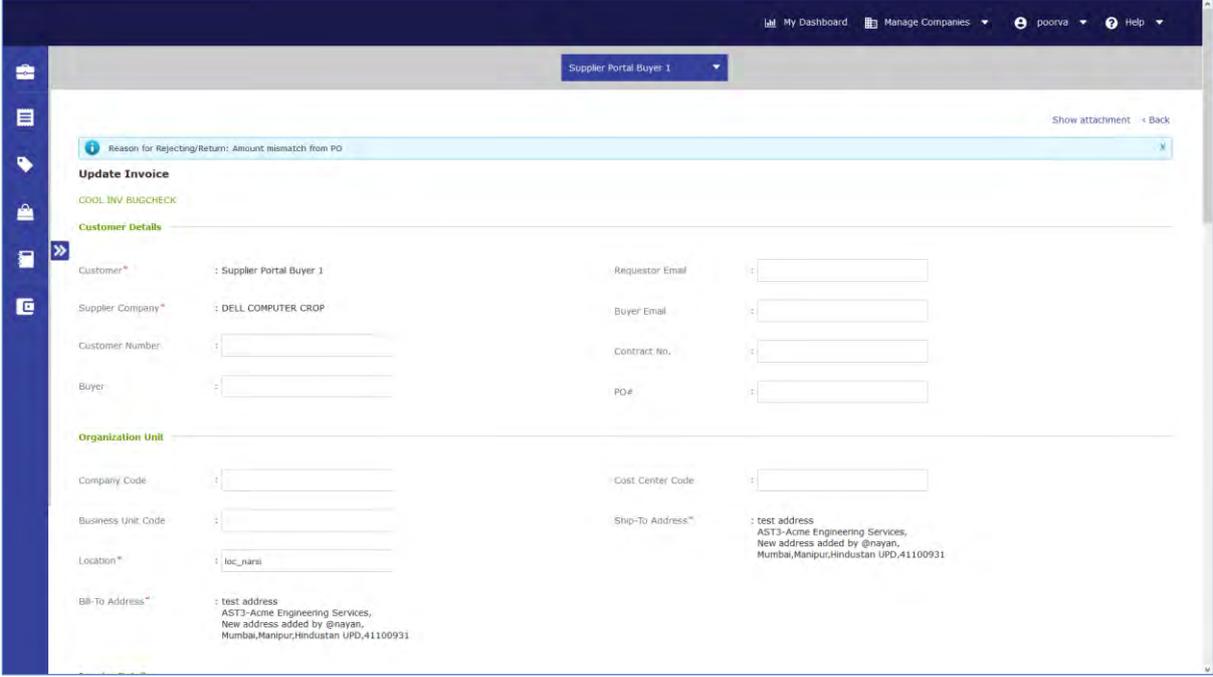
6.7.1.5 Editing Invoices

To edit an Invoice:

1. Navigate to the following location: Side Panel > My Invoices > View Invoices > Required Supplier Company.

2. Look for the required invoice with **Draft** or **Rejected** status.

3. Click on the  **Edit** icon corresponding to the required invoice.



Supplier Portal Buyer 1

Reason for Rejecting/Return: Amount mismatch from PO

Update Invoice

COOL INV BUGCHECK

Customer Details

Customer\* : Supplier Portal Buyer 1

Supplier Company\* : DELL COMPUTER CROP

Customer Number :

Buyer :

Requestor Email :

Buyer Email :

Contract No. :

PO# :

Organization Unit

Company Code :

Business Unit Code :

Location\* : lac\_narsi

Cost Center Code :

Ship-To Address\* : test address  
AST3-Acme Engineering Services,  
New address added by @nayan,  
Mumbai,Manipur,Hindustan UPD-41100931

Bill-To Address\* : test address  
AST3-Acme Engineering Services,  
New address added by @nayan,  
Mumbai,Manipur,Hindustan UPD-41100931

4. Make the required changes in the invoice details, item details, taxes and so on.

5. Perform any one of the following actions as required:

- A. **Cancel:** To discard the changes made in the invoice and exit.
- B. **Save as draft:** To save the changes made in the invoice and exit.
- C. **Submit:** To save the changes made in the invoice and submit the invoice for processing.

### 6.7.1.6 Creating Invoice

#### **To create an Invoice for a Purchase Order:**

1. Navigate to the following location: Side Panel > **My Invoices** > **Create PO Invoice** > Required Customer Company.

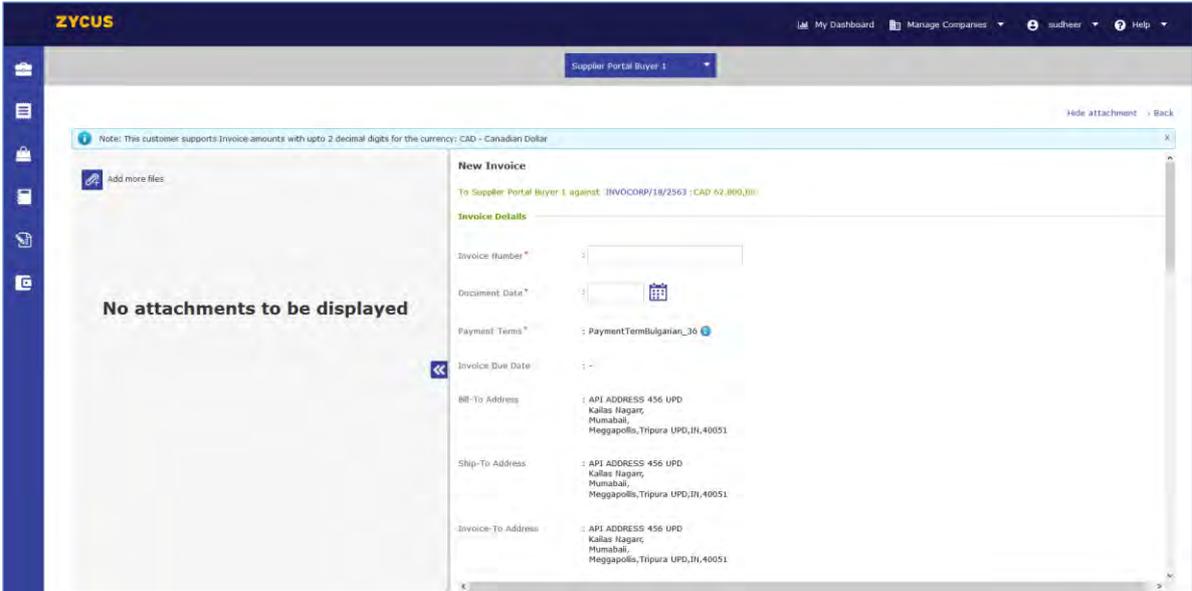
The screenshot displays the 'Purchase Orders' section of the Zycus Supplier Network. It features a search bar at the top left, a filter panel on the left, and a main table of purchase orders. The table columns include PO Type, Customer, Supplier Company, Released on, Number of Items, Delivery Location, Delivery Date, and Amount. The table shows several records, including partially invoiced and fully invoiced orders.

PO Type	Customer	Supplier Company	Released on	Number of Items	Delivery Location	Delivery Date	Amount
Standard	Supplier Portal Buyer 1	DELL COMPUTER CROP	17/11/2017	1	Jyoti City	---	AUD 1,000.00
Blanket	Supplier Portal Buyer 1	DELL COMPUTER CROP	16/11/2017	2	Jyoti City	---	USD 1,380.00
Standard	Supplier Portal Buyer 1	DELL COMPUTER CROP	31/10/2017	1	Jyoti City	31/10/2017	USD 10,600.00
Standard	Supplier Portal Buyer 1	DELL COMPUTER CROP	31/10/2017	1	Jyoti City	31/10/2017	USD 11,160.00
Standard	Supplier Portal Buyer 1	BARCLAYS_CHECK AMX LENGTH ON EINVOICE SIDE_ОДИН ИЛИ НЕСКОЛЬКО ИЗ ОТЧЕТОВ, КОТОРЫЕ ВЫ ЖЕЛАЕТЕ УДАЛИТ	26/10/2016	1	Fasd	01/11/2016	GBP 1,213.00

2. Look for the required purchase order using the **Search**, **Filter** or **Sort** options.

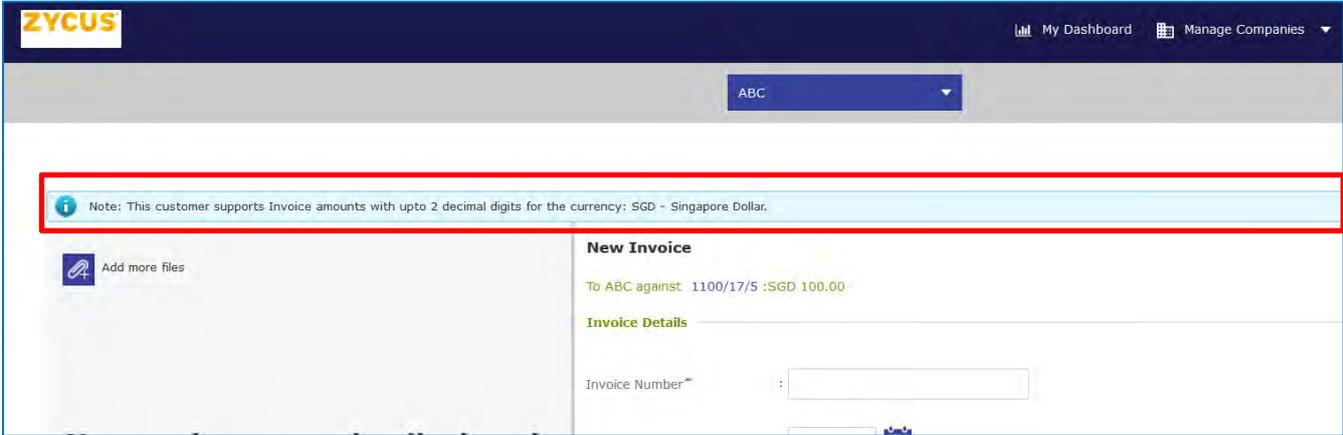
3. Click on the **+ Invoice** icon from actions menu corresponding to the required **Purchase Order**.

4. Enter the required details on the **New Invoice** page.



**NOTE:** You can edit/add item name while creating direct invoices against blanket purchase order if the item name wasn't mentioned by the buyer. The item name which you newly added will be sent to the buyer for approval in the invoice.

**NOTE:** ZSN will restrict Suppliers from submitting amounts and UOM values that exceed **customer supported decimal precision**. Suppliers will be informed of their customer-specific decimal precision value for a given currency in the form of a **Note**, while *creating a New Invoice, Flipping a PO to an invoice, or Updating an Invoice*:



**NOTE:** The customer's decimal precision is set and enabled by the customer himself. If not enabled, the **Note** will not be displayed, and the portal will follow the default decimal precision.

**NOTE:** Invoices not complying with this will be automatically rejected. Refer the following screenshot with auto-rejected Invoice:

**ZYCUS™**

Dear Anuja M,

Invoice INV 2611 created against Zycom for your company GALAXY CORP on 14/05/2018 against PO/02611 has been Returned by the Customer. You can login to your account to make the necessary changes and submit for approval.

**Reason for rejection/return: Invoice contains amounts exceeding 2 decimal digits**

Items								
Line No.	Item Name	Description	Market Price	Unit Price	Item Quantity	Delivery Date	UOM	Total Price
1	Lunchbox		USD 10.94629	USD 10.94629	10.0		NA EA	USD 109.4629
3	laptop		USD 100.0	USD 100.0	1.0		NA EA	USD 100.0
<b>Sub-total :</b>								<b>USD 209.4629</b>

You can view the invoice from the View Invoice link below for your reference.

[View Invoice](#)

Regards,  
Zycus Supplier Network

You have received this email because the email address [anuja.majumdar@zycus.com](mailto:anuja.majumdar@zycus.com) was subscribed for email notifications for this supplier company on Zycus supplier network. In case of any issues, please contact Zycus helpdesk at [tech-support@zycus.com](mailto:tech-support@zycus.com)

5. You can edit the item name while creating an invoice against blanket purchase order if the item name is not mentioned.

6. Select the items that are being shipped and enter their shipping quantity.

7. Make the required changes to the **Market Price** and the **Qty to be Invoiced**.

8. Perform the below required action as per requirement:

- A. **Add/Edit Comments:**
  - i. Click on the icon corresponding to the required item.
  - ii. Enter or edit the comments as per requirement.
  - iii. Click **Save** to save the comments.

**B. Add/Edit Taxes:**

- i. Click on the icon corresponding to the required item.
- ii. Enter the **Tax Name & Tax Rate**, the **Amount** is auto calculated.

Click on the icon to add additional taxes **OR** click on the icon to remove existing taxes.

- iii. Add/Remove taxes as per requirements.

Select the **Taxes Inclusive or Not applicable on this item?** option if tax is not applicable for the item **OR** if the item cost is inclusive of all taxes.

Click **Remove all taxes** to remove all taxes applied for the item.

- iv. Click **Save** to save the entered taxes and their information.

The **Taxes** input by the supplier will be **automatically rounded off** as per the **customer supported decimal precision** for the given currency.  
 Example: If the tax rate is 7%, and taxable amount is 15.55, the tax amount is 1.0885. If the decimal precision is 2, the tax amount will be rounded off to 1.09. This value will be used for all future calculations as well. Same rule goes for **Discount**.

9. To enter the discount information for the invoice, click **Modify** present under the **Item details** section.

Line No.	Item No.	Item Name	UDM	Market Price	Unit Price	Ordered Qty	Invoked Qty	Credited Qty/Amt	Qty to be Invoiced	Taxes	Total Price	Actions
1	N/A	test	MONEY	USD 1	USD 1,00	1000	0	0			USD 1,000,00	
2	N/A	test12	EA	USD 10	USD 10,00	20	0	0	20	USD 20,00	USD 200,00	
<b>Item Sub-Total:</b>											USD 200,00	
<b>Total Discount on Item Sub-Total:</b>											USD 0,00	

10. The discount for an invoice can be entered in two aspects:

**A. Entire Invoice:**

- 1. Select the **Discount an amount from the Entire Invoice** option.

2. Enter the exact discount amount to be set for the Invoice.

Discount

Switching between discount type may loss discount entered.

Discount an amount from the Entire Invoice

Discount Amount: USD 0,00

Specify discount for Individual Items

Cancel Save

3. Click **Save** to set the entered discount for the Invoice.

**B. Individual Items:**

- 1. Select the **Specify discount for Individual items** option
- 2. Select the Discount Type for the required item
- 3. Enter the required discount value for the item

Discount

Discount an amount from the Entire Invoice

Specify discount for Individual Items

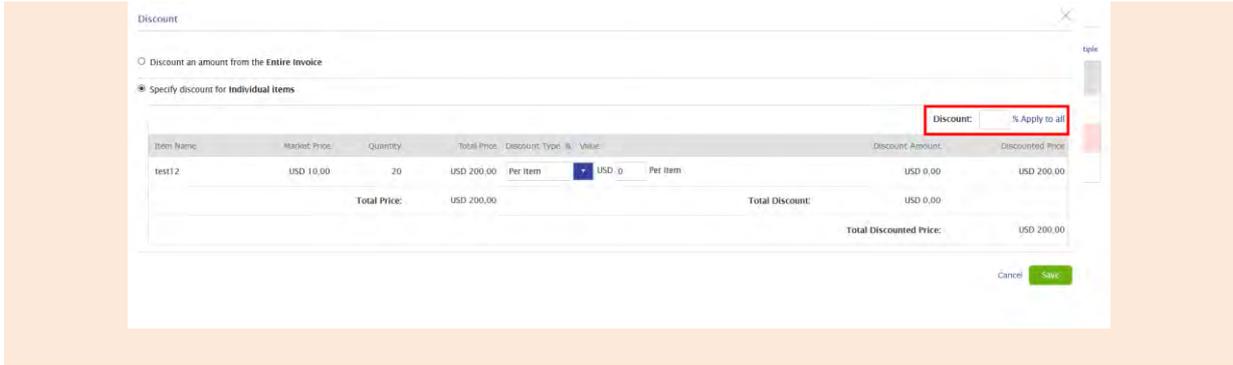
Item Name	Market Price	Quantity	Total Price	Discount Type	Value	Discount Amount	Discounted Price
test12	USD 10,00	20	USD 200,00	Per Item	USD 0	USD 0,00	USD 200,00
<b>Total Price:</b>			USD 200,00	<b>Total Discount:</b>		USD 0,00	<b>Total Discounted Price:</b> USD 200,00

Discount: % Apply to all

Cancel Save

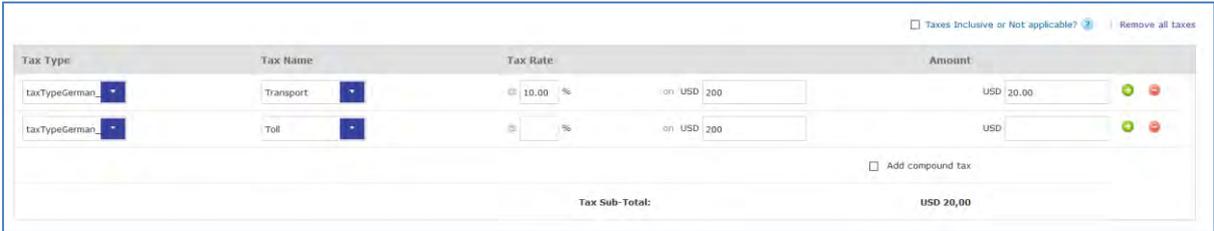
4. Click **Save** to set the entered individual item discounts in the Invoice.

To enter a common discount % for all individual items, enter the **Discount %** and click **Apply to all**.

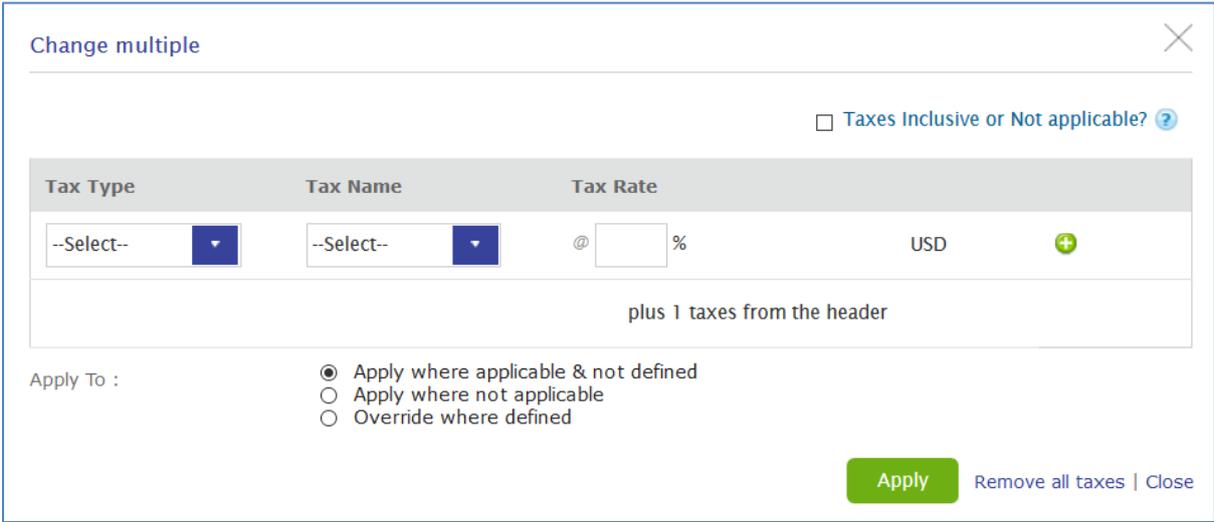


Check the **Taxes Inclusive or Not applicable?** option if taxes are inclusive or not applicable for the invoice.

10. Enter the required tax information for the invoice.



11. To enter common tax information for all individual items, select the required items and click **Change multiple**.



12. Add and enter all the required tax information for the selected items.

Click on the icon to add additional taxes **OR** click on the icon to remove existing taxes.

13. Select the condition as to how the tax should be applied in the **Apply To** section.

Apply To :

- Apply where applicable & not defined
- Apply where not applicable
- Override where defined

14. Click **Apply** to apply all specified taxes for the selected items.

Click **Remove all taxes** to remove *all taxes applied for the item*.

15. Enter all the required charges like Extra, Freight & Insurance Charges

16. Enter the applicable **Excise Duties** for the Invoice

17. Perform any one of the following actions as required:

- A. **Submit:** To save the changes made in the invoice & submit it.
- B. **Save as draft:** To save the changes made in the invoice and save it as a Draft Invoice.
- C. **Cancel:** To discard the changes made in the invoice and exit.

Invoice can also be created using the **Create Invoice** option under the **Actions** menu on the **View PO** page for the respective Purchase Order.

18. If discounted payment terms are used, you will see an **Early Payment Discount** segment in your invoice document as highlighted below.

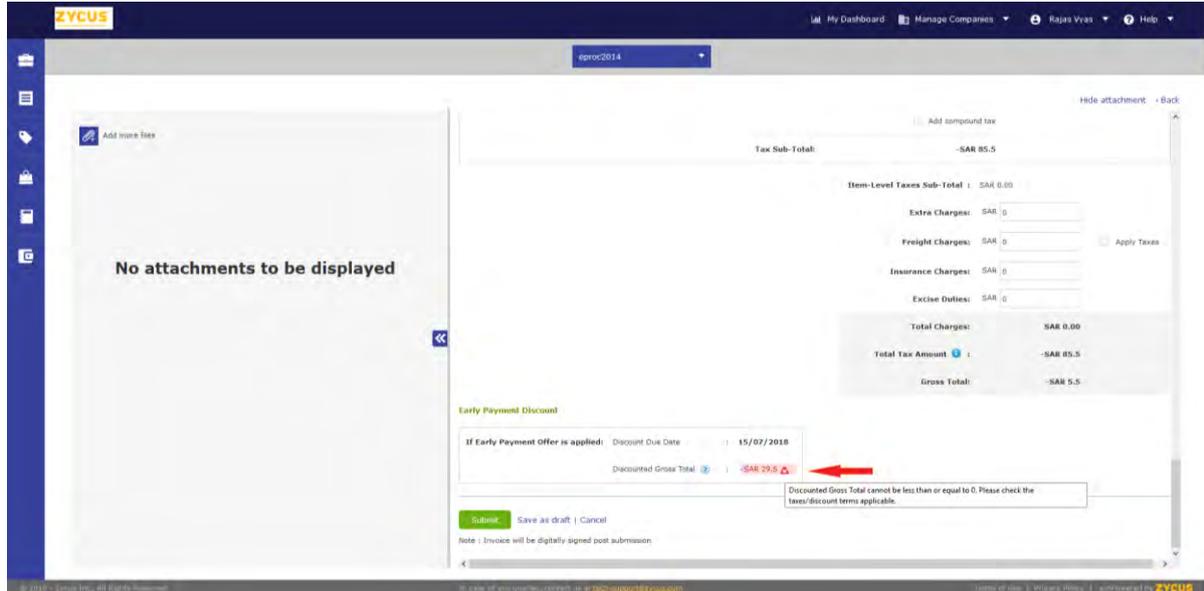


19. Hovering on the **Discounted Gross Total** field, you will be able to view the base amount on which the discount is calculated.

20. For example, in the screenshot above:

- **Item Sub-total = 40.00,00**
- **Discounted Gross Total = Gross Total - Early payment discount**
- **Gross Total = 42.000,00** (item sub-total + taxes)
- **Early Payment Discount = 90% on USD 40.000,00 = USD 36.000,00**
- Hence **Gross Total - Early payment discount = 42.000,00 – 36.000,00 = 6.000,00**

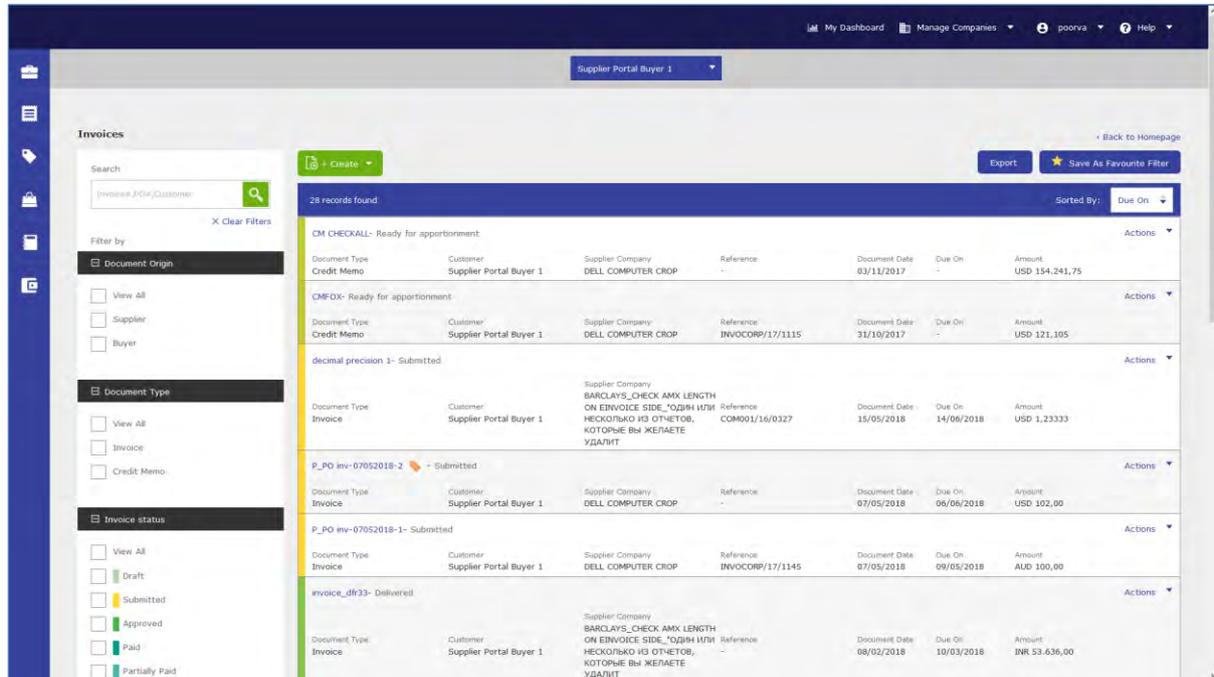
21. If the discounted gross total is less than 0, you will see the following message on the screen:



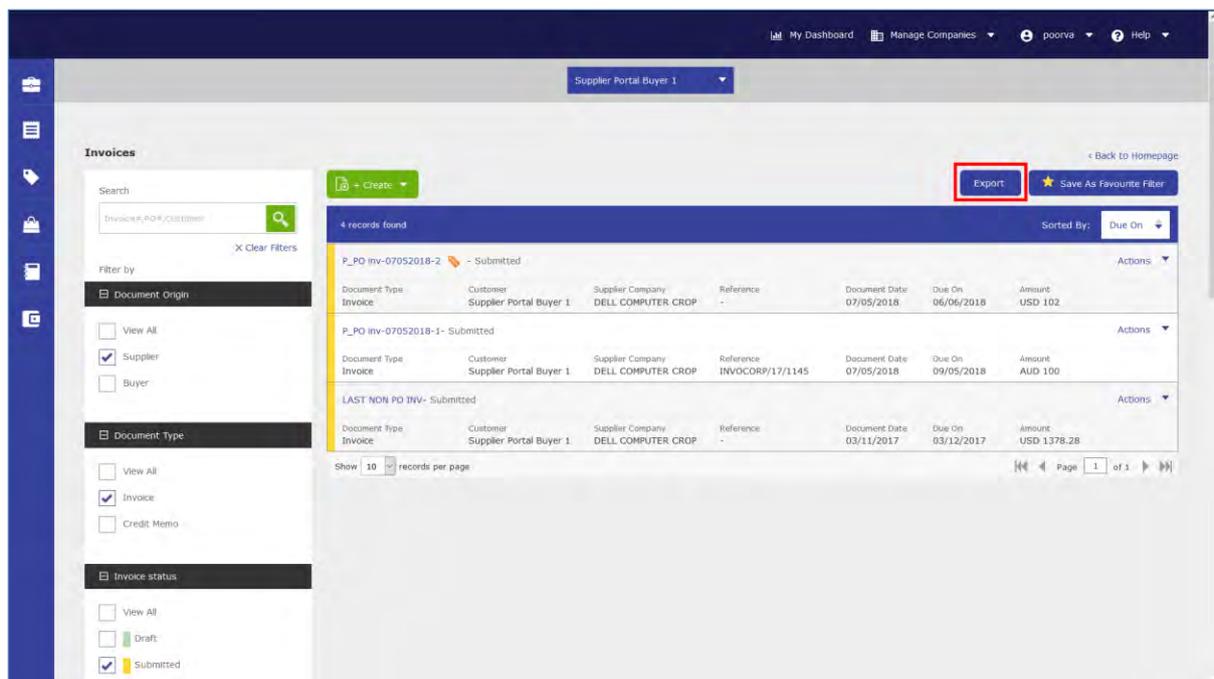
### 6.7.1.7 Exporting Invoice Details

From this listing page, you have an option to download all details of your company’s invoices. To download the invoice details, follow the steps below:

1. Navigate to Invoice listing page from **Side Panel > My Invoices > View Invoices > Customer Name**. You will land on the following page:



2. To export the invoice details, click **Export** as highlighted in the image below:



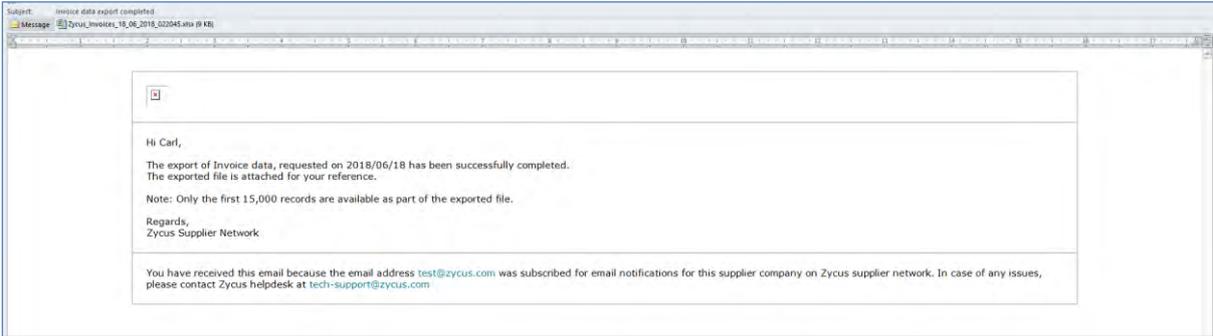
- Clicking **Export**, you will see the following popup which will notify you that data export is in progress and you will be notified through an email once the file export is complete. Click **Ok**.

**Information**

Data export has been initiated. You will receive an e-mail notification with the exported file when it is completed.

Ok

- Once the file is ready, you will receive the exported file (attached) to your registered email ID as shown below:



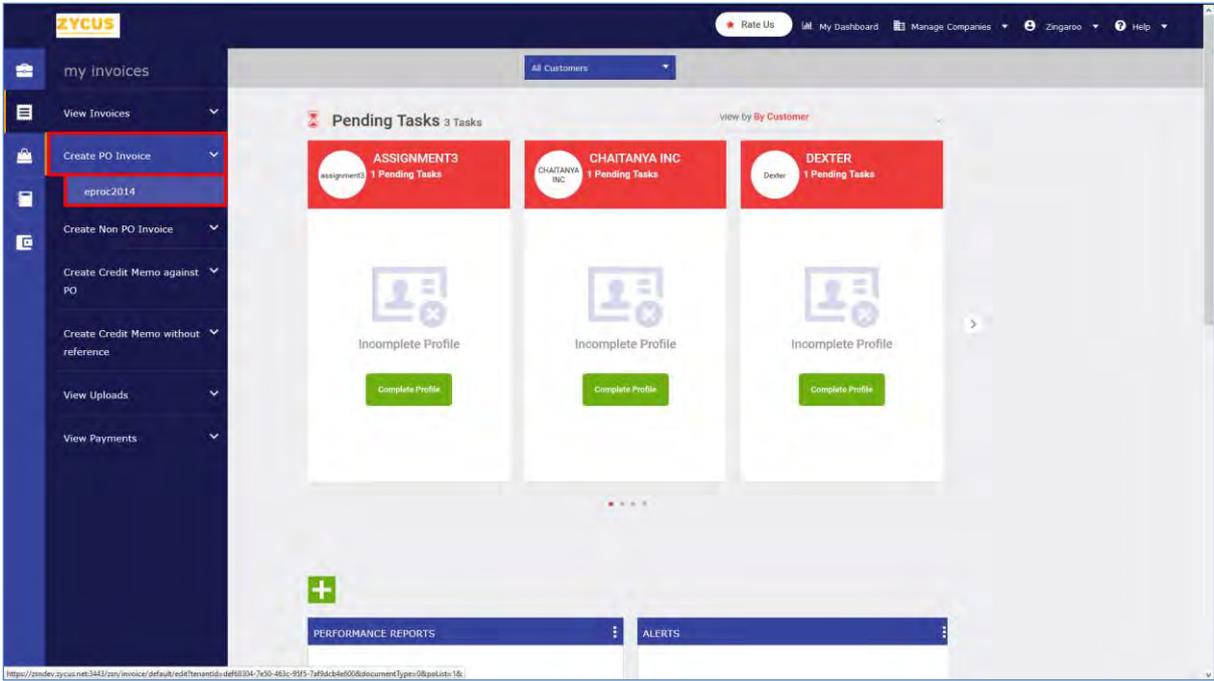
- Open the file to view your invoice details:

Invoice Number	Document Type	Supplier Company	Status	Submitted On	Due On	Purchase Order Reference	Payment Reference	Total Paid Amount	Total Amount
20171227	Invoice	JB Chemicals	Approved	2017/12/27	2018/01/06				TZS 15,129.00
@TempTaxName	Invoice	JB Chemicals	Delivered	2017/11/16	2017/11/21				USD\$ 1.00
e23	Invoice	JB Chemicals	Delivered	2017/11/16	2017/11/21				MX\$ 1.00
e	Invoice	JB Chemicals	Delivered	2017/11/16	2017/11/21				MX\$ 1.00
ewt	Invoice	JB Chemicals	Delivered	2017/11/16	2018/02/24				USD\$ 1.00
Tets Invoice 1011_01	Invoice	JB Chemicals	Delivered	2017/11/10	2017/12/25	ZSPDEV1 PO/1632			TZS 45,900.00
Test_BPO_1	Invoice	JB Chemicals	Delivered	2017/11/10	2017/11/22	ZSPDEV1 PO/1946			USD 505.00
Testing Freight Taxes	Invoice	JB Chemicals	Delivered	2017/11/06	2018/02/14				USD 865.64
1478963	Invoice	JB Chemicals	Submitted	2017/11/06	2017/11/11				USD 304.86
789258test	Invoice	JB Chemicals	Delivered	2017/10/31	2017/11/10				USD\$ 27.00
Invoice_2030_Test	Invoice	JB Chemicals	Delivered	2017/10/23	2017/11/04	ZSPDEV1 PO/2030/suresh.zspdev-Steffy			USD 1,000.00
aaasa	Invoice	JB Chemicals	Submitted	2017/10/20	2017/10/26				USD 1.00
g013	Invoice	JB Chemicals	Submitted	2017/10/11	2017/10/21				USD\$ 1.00
453432	Invoice	JB Chemicals	Submitted	2017/10/11	2017/10/21				USD\$ 1,089.00
48595	Invoice	JB Chemicals	Submitted	2017/10/11	2018/01/19				USD\$ 1,936.00
8575775	Invoice	JB Chemicals	Delivered	2017/10/10	2017/10/16				USD\$ 1,936.00
24242434	Invoice	JB Chemicals	Delivered	2017/09/25	2017/10/30				USD\$ 1,989.00
676453	Invoice	JB Chemicals	Delivered	2017/09/13	2017/10/28				USD\$ 123.00
37	Invoice	JB Chemicals	Delivered	2017/09/08	2017/12/17				VNO 1,122.00
33	Invoice	JB Chemicals	Delivered	2017/09/08	2017/09/18				XAF 1,936.00
32	Invoice	JB Chemicals	Delivered	2017/09/07	2017/10/22				Best_Final 1,936.00
123445	Invoice	JB Chemicals	Delivered	2017/09/07	2017/09/17				AUD 270.00
56	Invoice	JB Chemicals	Delivered	2017/09/07	2017/10/22				USD 102.00
child invoice	Invoice	JB Chemicals	Delivered	2016/09/04	2016/09/18	ZSPDEV1 PO/641			MYR 6.35
<b>Total Records : 25</b>									

**Note:** The data exported will be as per the filter applied on the listing page. You will be able to view the applied filters in the exported file as well. The maximum limit on the number of records exported is 15,000. Records beyond 15,000 will not be part of the exported file.

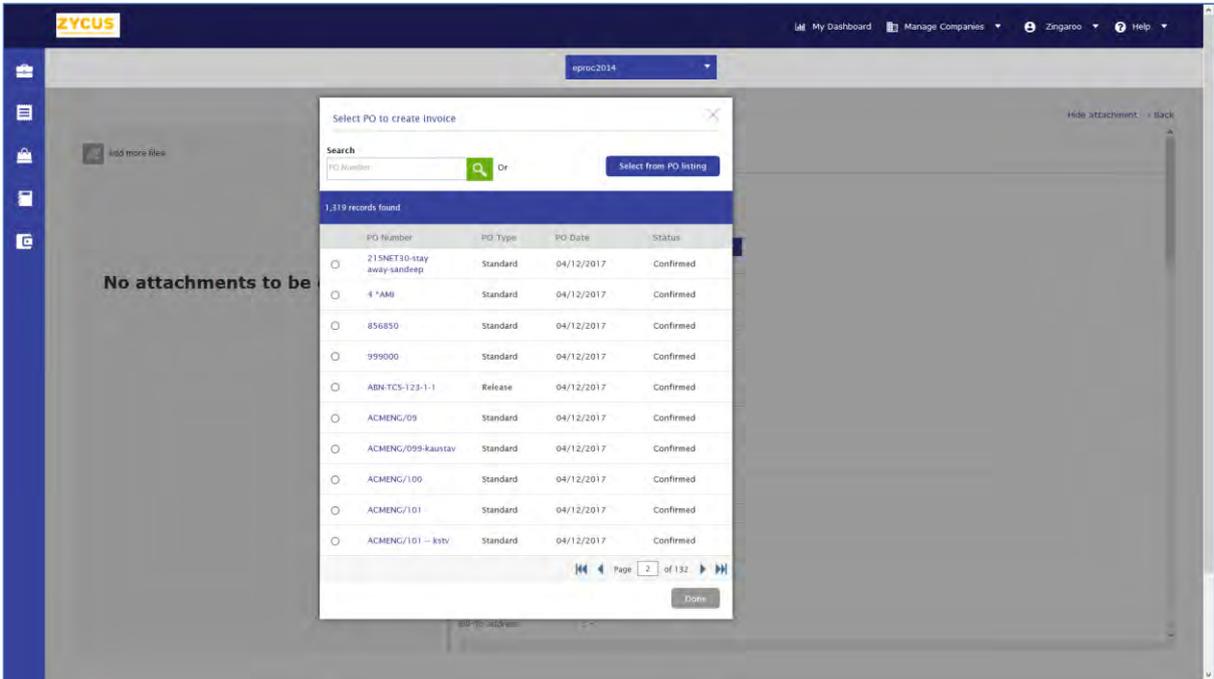
### 6.7.2 How to Create a PO Invoice?

- 1. To create a PO invoice, from the side panel, under **My Invoices**, click **Create PO Invoices**.
- 2. Select a customer for whom you want to create a PO invoice, for example **eProc2014**.



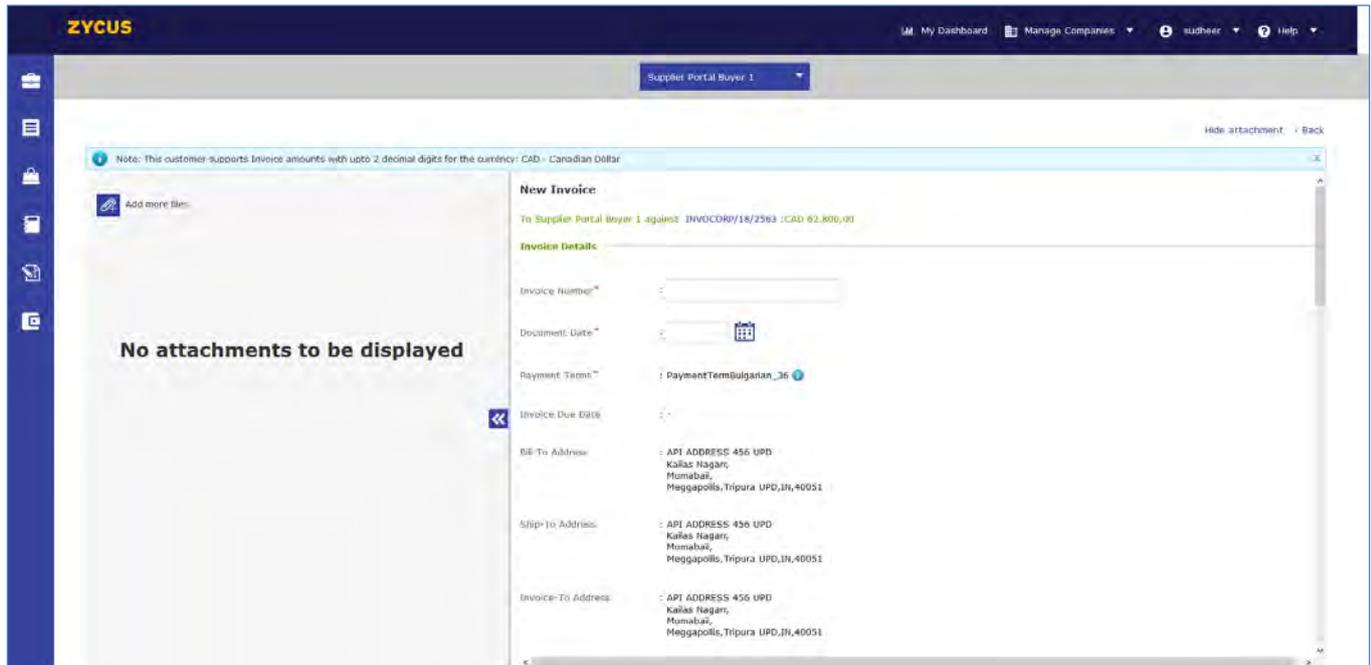
- 3. You will see the following popup. This popup will have a list of PO's which you can select to create an invoice.

**Note:** Only the PO's with confirmed status will be available in this popup.



- 4. Select a PO from the list; you can also search for a PO by typing the PO number in the search box. Click **Done**.

5. You will be navigated to the following page:



6. All the necessary PO information will be filled in the invoice by default such as:

- Invoice-To Address
- Payment Terms
- Bill-To Address
- Ship-To Address
- Bank Details (if required, you can change the bank details from the drop-down menu)

**Note:** If the supplier uses cXML invoices, default bank details will be used.

7. You will also be able to select **Remit to Address** for the PO invoice which will specify the address type, for example **Headquarters** as **HQ**.
8. Enter all the required information such as **Invoice No.**, **Invoice Date**, **Remit to Address**, and **Ship-From Address**.
9. Select the items you want to invoice by checking the box against the item name. You can select all items by checking the box as shown below:

Item details													
<input type="checkbox"/>	Line No.	Item No.	Item Name	UOM	Market Price	Unit Price	Ordered Qty/Amt	Invoiced Qty/Amt	Credited Qty/Amt	Qty/Amt to be Invoiced	Taxes	Total Price	Actions
<input checked="" type="checkbox"/>	1	N/A	Laptop	EA	USD 12,000	USD 12,000,000	12	0	0	12,000	USD 0,000,000	USD 144,000,000	
<input checked="" type="checkbox"/>	2	N/A	Server	EA	USD 23,000	USD 23,000,000	23	0	0	23,000	USD 0,000,000	USD 529,000,000	
<b>Item Sub-Total:</b>											USD 673,000,000		

**Note:** If a line item has “Receive by: Amount” on the PO; **Market Price**, **Unit Price**, and **UOM** fields should have the value N/A.

The “Ordered Qty/Amt” will be reflected as the “Total Price” for that line item.

10. There may be Milestone items in the PO. These will be reflected with the milestone flag

Line No.	Item No.	Item Description and Supplier	UOM	Market Price	Unit Price	Invoiced Qty/Item	Credited Qty/Amt	Invoice Qty/Amt	Taxes	Total Price	Actions
1		Cleaning & Labour Services	N/A	N/A	N/A	70	0	USD 70.00	USD 0.00	USD 2000.00	
Serial No.		Milestones	Percentage	Invoiced Qty/Item	Credited Qty/Amt	Invoice Qty/Amt					
1		Cleaning Services	75%	50	0	USD 50.00					
2		Floor Mat Dry Cleaning	25%	20	0	USD 10.00					
2		Cleaning & Labour Services	N/A	N/A	N/A	50	0	USD 50.00	USD 0.00	USD 100.00	

11. Suppliers will be able to enter invoice qty/amt for against each field. These fields will be editable once a corresponding milestone is selected

12. If the invoice is already created for a milestone the invoice qty/amt will be defaulted to show the remaining amount

13. You can add taxes to the line items by clicking the icon. You will see the following popup:

Taxes

Taxes Inclusive or Not applicable on this item? [?](#) | [Remove all taxes](#)

Tax Type	Tax Name	Tax Rate	on USD	Amount
elnv_Sanity_Tax	elnv_Sanity_Tax	23 %	1480	USD 340.4
Tax_Type_Auto	Tax_Name_Auto	5.55 %	1480	USD 82.14

**Tax Sub-Total:** -USD 258.26

plus 0 taxes from the header

[Save](#) [Close](#)

14. Suppliers will now be able to include negative taxes while generating an Invoice on the Supplier Network. While adding taxes at the header/line level on an invoice, suppliers can simply put in the “-ve” sign to indicate that it is a negative tax.

15. To add tax, select **Tax Type** and **Tax Name** from the drop-down list. Based on this selection, modify the **Tax Rate %** as per the norms.

16. You can also apply taxes at header level as shown in the image below:

Item details [Change multiple](#)

Line No.	Item No.	Item Name	UOM	Market Price	Unit Price	Ordered Qty	Invoiced Qty	Credited Qty/Amt	Qty to be Invoiced	Taxes	Total Price	Actions
1	N/A	Laptop	EA	USD 200	USD 200.00	1000	93	0	900	USD 0.00	USD 180,000.00	

**Item Sub-Total:** USD 180,000.00

**Total Discount on Item Sub-Total:** USD 0.00 [Modify](#)

Taxes Inclusive or Not applicable? [?](#) | [Remove all taxes](#)

Tax Type	Tax Name	Tax Rate	on USD	Amount
WHT	WHT	- 5 %	180000	USD -9000.00

Add compound tax

**Tax Sub-Total:** USD -9,000.00

17. Both –ve tax rate and/or –ve tax amount can be entered. –ve tax rate/amount indicates withholding taxes.

18. When –ve taxes are added, the discounted item total, on which the tax is applicable, can be edited.

**Item details**  Change multiple

<input type="checkbox"/>	Line No.	Item No.	Item Name	UOM	Market Price	Unit Price	Ordered Qty	Invoiced Qty	Credited Qty/Amt	Qty to be Invoiced	Taxes	Total Price	Actions
<input checked="" type="checkbox"/>	1	N/A	Laptop	EA	USD 200	USD 200.00	1000	93	0	900	USD 0.00	USD 180,000.00	
<b>Item Sub-Total:</b> USD 180,000.00													
Total Discount on Item Sub-Total: USD 0.00 <a href="#">Modify</a>													
<input type="checkbox"/> Taxes Inclusive or Not applicable? <a href="#">?</a>   <a href="#">Remove all taxes</a>													
Tax Type	Tax Name	Tax Rate	Amount										
WHT	WHT	@ - 5 % on USD	100000	USD	-5000.00								
<input type="checkbox"/> Add compound tax													
<b>Tax Sub-Total:</b>										USD -5,000.00			

**Note:** You can type a tax name which is not present in the drop-down list.

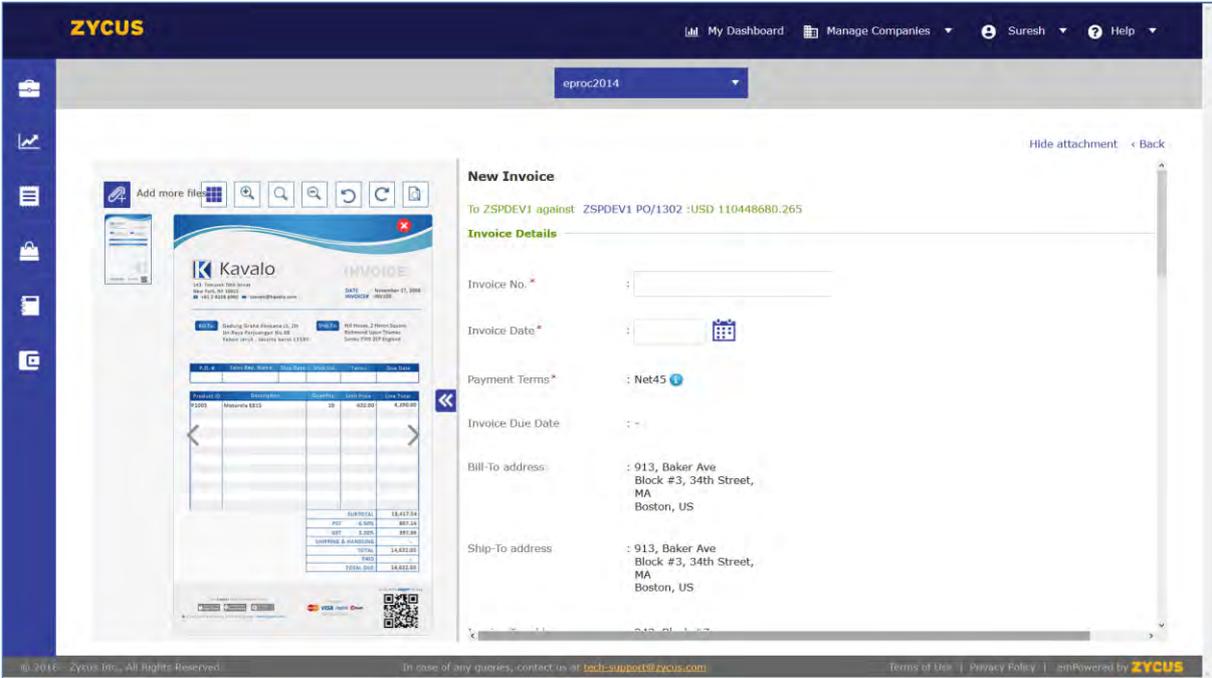
**Note:** If the locale of your profile is set to the language of your choice, the tax-type and tax-rate will also be reflected in the same language.

19. After you complete entering all information, click **Submit**.

**6.7.2.2 Side by Side Panel**

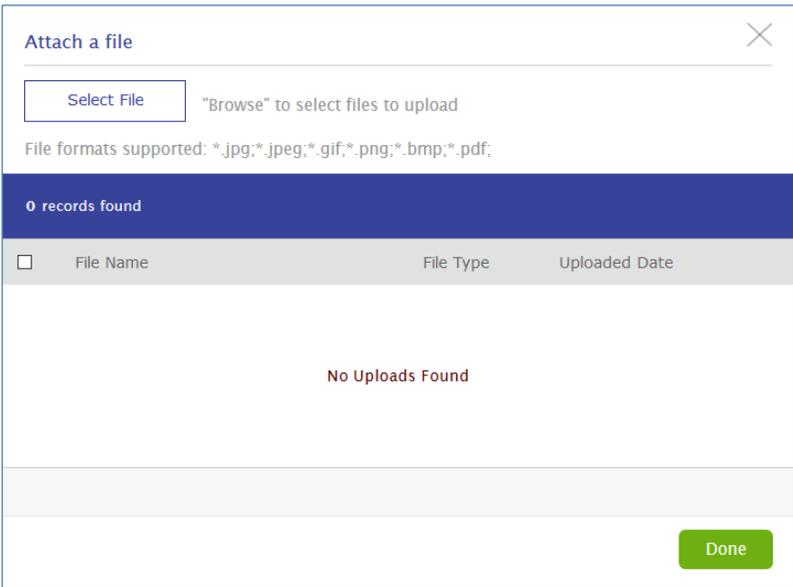
Side by Side panel is a different view of PO invoice creation page.

Side by Side panel allows you to view the uploaded files and fill the invoice simultaneously. It separates the web page into two parts with image on the left and invoice on the right. Following is an image of side by side panel:



**6.7.2.3 Understanding Side by Side Panel**

1. Here you can see the uploaded document while creating a PO invoice.
2. There will be tools present above the uploaded document.
3. Use to view/hide the image thumbnails.
4. Use to zoom out, view actual size, and zoom in the image.
5. Use to rotate the image clockwise and anti-clock wise.
6. Use to view the document in new tab.
7. Use to expand or collapse invoice filling.
8. Use to add more documents. Select a file, click **Done**.



**Note:** As a supplier you can confirm PO and create Invoice from email notifications by clicking **Confirm and Create Invoice**.

When you confirm a PO from mail, you will be redirected to the **Create Invoice** page where you can flip details directly in to the invoice and submit the invoice.

This will be applicable for both registered and unregistered users.

In case the PO is already confirmed by another user, then you will be directly taken to the create invoice page.

In case the PO is already confirmed and fully invoiced, then you will see the following message:

*“The PO has been already fully invoiced by another user from your organization. You can now login/Register to track the status of the invoice.”*

### 6.7.3 How to Create a Non PO Invoice?

*Note: You can create a Non PO Invoice if it is enabled by your buyer. If it is not enabled, you will not see the option 'Create Non PO Invoice'.*

*If your company profile is put on hold by your customer, then you won't be able to create a Non-PO Invoice for that customer.*

Suppliers can create a non PO invoice from their end for a given customer. The following page shows the Non PO Invoice creation page.

The screenshot displays the 'New Invoice' page in the Zycus Supplier Network. The page has a dark blue header with the Zycus logo and navigation links like 'My Dashboard', 'Manage Companies', and user information. A dropdown menu shows 'Supplier Portal Buyer 1'. A note at the top states: 'Note: This customer supports Invoice amounts with upto 2 decimal digits for the currency: CAD - Canadian Dollar'. The main form is divided into three sections: 'Customer Details', 'Organization Unit', and 'Invoice Details'. The 'Customer Details' section contains fields for Customer (pre-filled with 'Supplier Portal Buyer 1'), Supplier Company (pre-filled with 'DD\_SUPPLIER 1'), Customer Number, Buyer, Requestor Email, Buyer Email, Contract No., and PO #. The 'Organization Unit' section contains fields for Company Code, Business Unit Code, Location, Cost Center Code, and Bill-To Address. The 'Invoice Details' section is partially visible at the bottom.

**NOTE:** The customer-specific decimal precision rule applies to Non PO invoices as well.

#### To create a Non-PO Invoice:

Navigate to the following location: Side Panel > **My Invoices** > **Create Non PO Invoice** > Required Customer Company.

1. Select and/or enter all the required **Customer Details**.

**New Invoice**

**Customer Details**

Customer *	: ZSN P2P Integration	Requestor Email	:	<input type="text"/>
Supplier Company *	: --Select--	Buyer Email	:	<input type="text"/>
Customer Number	:	Contract No.	:	<input type="text"/>
Buyer	:	PO#	:	<input type="text"/>

**Note:** As a supplier, you have the flexibility of adding the **Buyer** and **Requester Email ID**.

2. Enter all the required **Organization Unit** details.

**Organization Unit**

Company Code	:	<input type="text"/>	Cost Center Code	:	<input type="text"/>
Business Unit Code	:	<input type="text"/>	Ship-To Address *	:	-
Location *	:	<input type="text"/>			
Bill-To Address *	:				

3. Select and/or Enter all the required **Invoice Details**.

**Invoice Details**

Invoice Number *	:	<input type="text"/>	Remit to Address *	:	
Currency *	:	<input type="text"/>	Ship-From Address *	:	
Document Date *	:	<input type="text"/>	Description	:	<input type="text"/>
Payment Terms *	:	--Select--	Comments	:	<input type="text"/>
Invoice Due Date	:	-	Attachments	:	<a href="#">Add Attachments</a>
Supplier Contact	:	Minal Parate	<b>Bank Details</b>		
Supplier Email	:	minal.parate@zycus.com	Bank Details for payment *	:	<input type="text"/>

**Note:** If the supplier uses cXML invoices, default bank details will be used.

4. Add the required attachments for the Non PO Invoice.

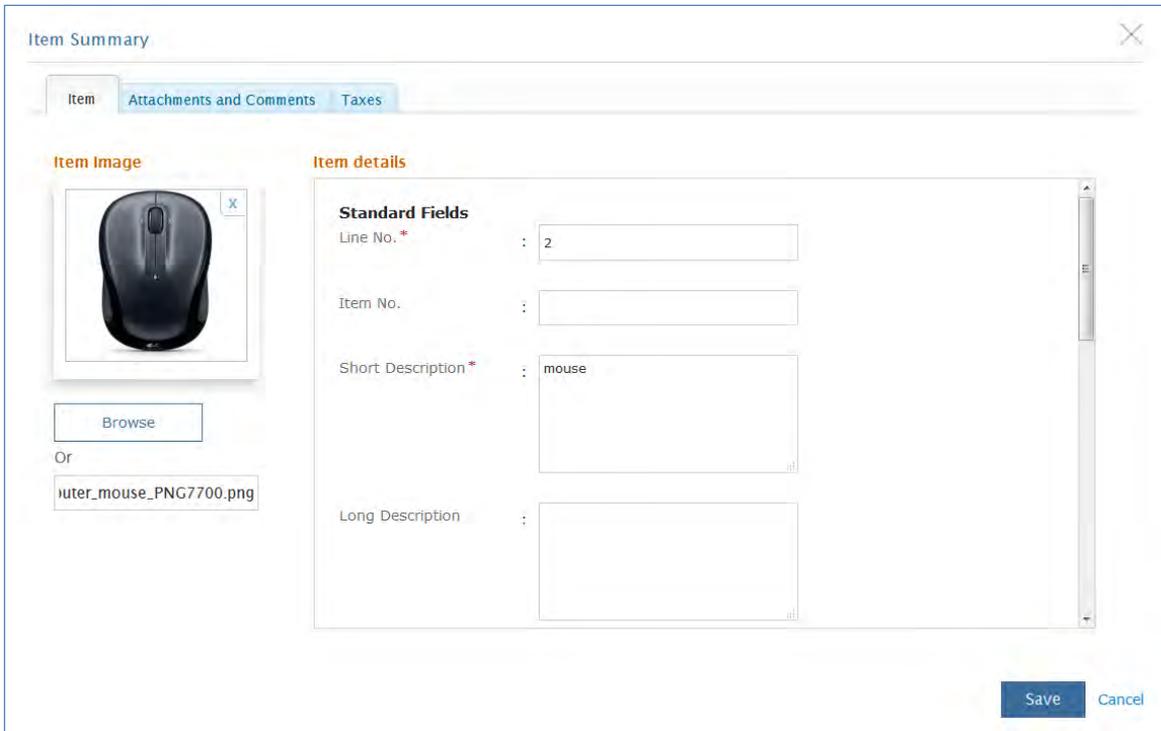
**Note:** Remit to Address will be classified as defined address types such as Remit to Address/ Headquarters as mentioned in your supplier company profile.

5. Click on **Add item** to add an item to the Non PO Invoice.



6. Enter all the required **Item Details** under the **Item** tab, such as:

- Line No.
- Short Description
- Product Category
- Item Type
- Invoice by
- Amount
- Market Price
- Quantity & UOM

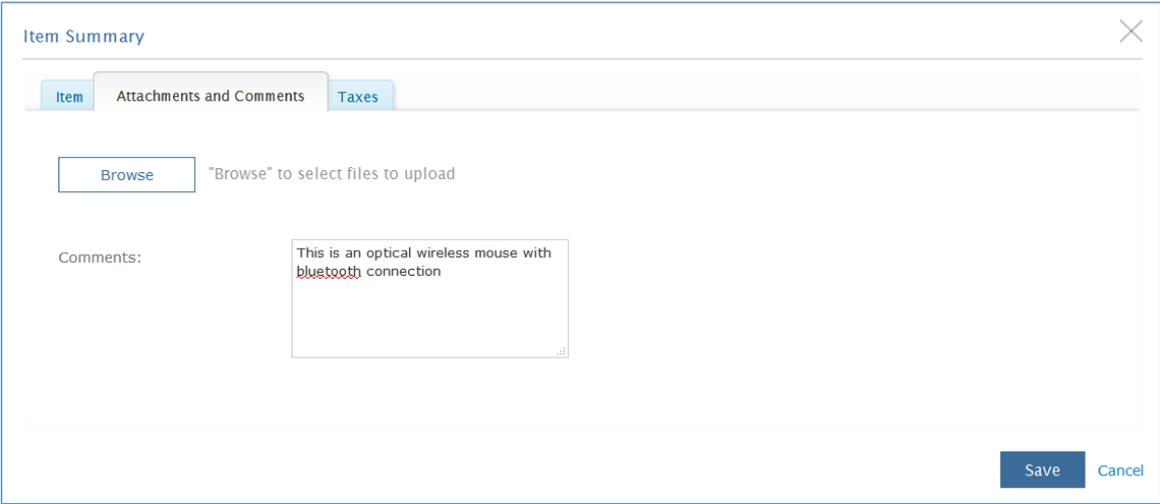


**Note:** If the **“Invoice by”** option is set to **Amount**, then:  
**Market Price, Unit Price and UOM fields will be disabled, with value as N/A.**

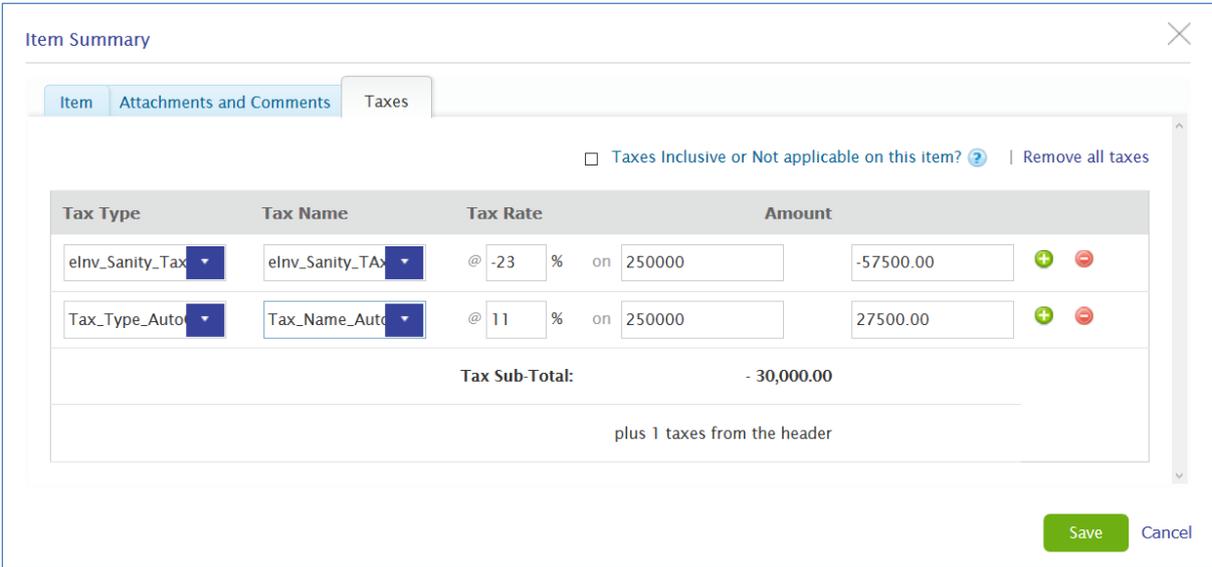
A new mandatory field, **“Amount”**, will become visible.

The value entered in the **Amount** field will be populated in the **Total Price and Invoice Qty/Amt or Credit Qty/Amt** column value.

- Attach the required files and mention the required comments under the **Attachments & Comments** tab.



- Add and enter all the required tax information for the item being added to the Non PO Invoice.



- Suppliers will now be able to include negative taxes while generating an Invoice on the Supplier Network. While adding taxes at the header/line level on an invoice, suppliers can simply put in the **“-ve”** sign to indicate that it is a negative tax.
- You can also apply taxes at header level as shown in the image below:

Line No.	Item No.	Item Description & Supplier	Category	Market Price	Invoiced Qty	Total Price	Actions
1	-	Laptop repairing	Computer hardware maintenance and support	500.00	500 EA	250,000.00	
						<b>Item Sub-Total:</b>	250,000.00

Tax Type	Tax Name	Tax Rate	Amount				
TestTaxType	Tax_Name_2847	@ -11 %	-27500.00				
newTaxTrial	newTaxName	@ 20 %	50000.00				
						<b>Tax Sub-Total:</b>	22,500.00

- 11. Both –ve tax rate and/or –ve tax amount can be entered. –ve tax will indicate withholding taxes.
- 12. When –ve taxes are added, the discounted item total, on which the tax is applicable, can be edited.

Line No.	Item No.	Item Description & Supplier	Category	Market Price	Invoiced Qty	Total Price	Actions
1	-	Laptop repairing	Computer hardware maintenance and support	500.00	500 EA	250,000.00	
						<b>Item Sub-Total:</b>	250,000.00

Tax Type	Tax Name	Tax Rate	Amount				
TestTaxType	Tax_Name_2847	@ -50 %	-125000.00				
						<b>Tax Sub-Total:</b>	-125,000.00

**Note:** You can type a tax name which is not present in the drop-down list.

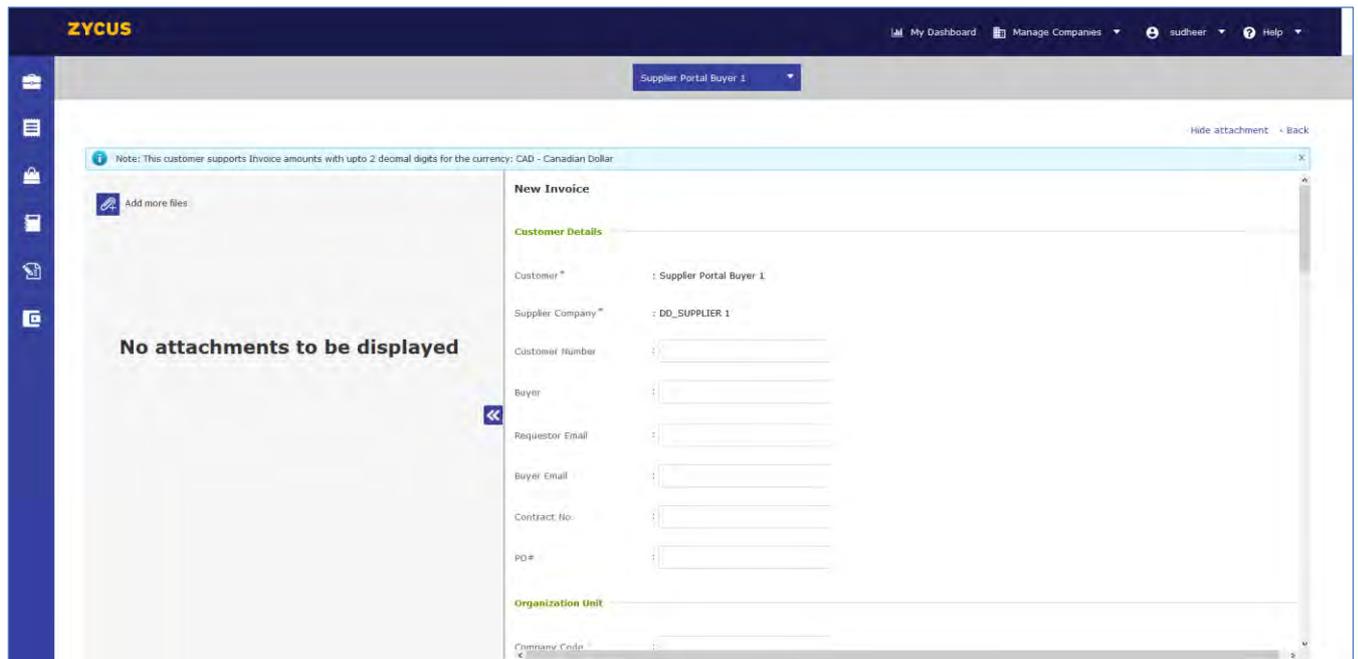
**Note:** As mentioned earlier, ZSN will automatically round off all tax values as per customer supported decimal precision for the given currency.

- 13. After you complete entering all information, click **Submit**.
- 14. The Non PO invoice you created will be visible under **My Invoices** listing page.

### 6.7.3.2 Side by Side Panel

Side by Side panel is a different view of Non PO invoice creation page.

Side by Side panel allows you to view the uploaded files and fill the invoice simultaneously. It separates the web page into two parts with image on the left and invoice on the right. Following is an image of side by side panel:

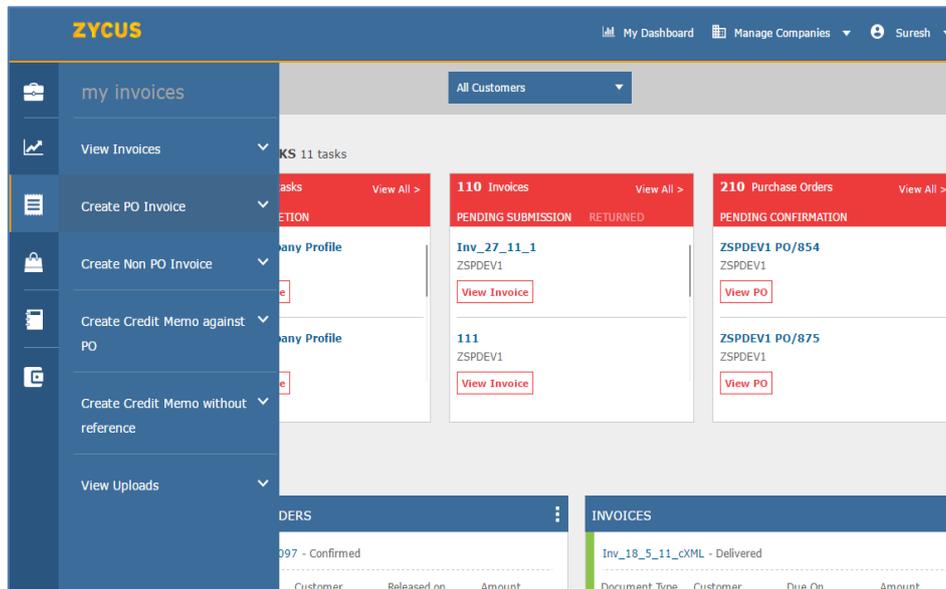


### 6.7.3.3 Understanding Side by Side Panel

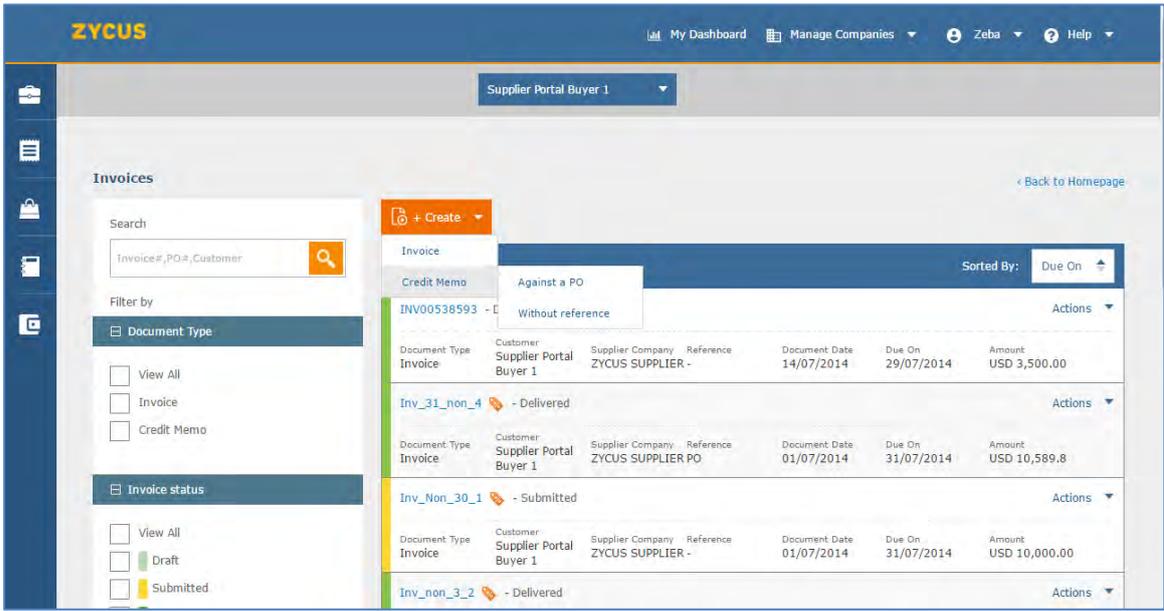
1. Here you can see the uploaded document while creating a non-PO invoice.
2. There will be        tools present above the uploaded document.
3. Use  to view/hide the image thumbnails.
4. Use    to zoom out, view actual size, and zoom in the image.
5. Use   to rotate the image clockwise and anti-clock wise.
6. Use  to view the document in new tab.
7. Use  to expand or collapse invoice filling.
8. Use  to add more documents.

## 6.7.4 How to Create Credit Memo?

1. Suppliers can create credit memos against the previous orders or without a reference to any order as well.



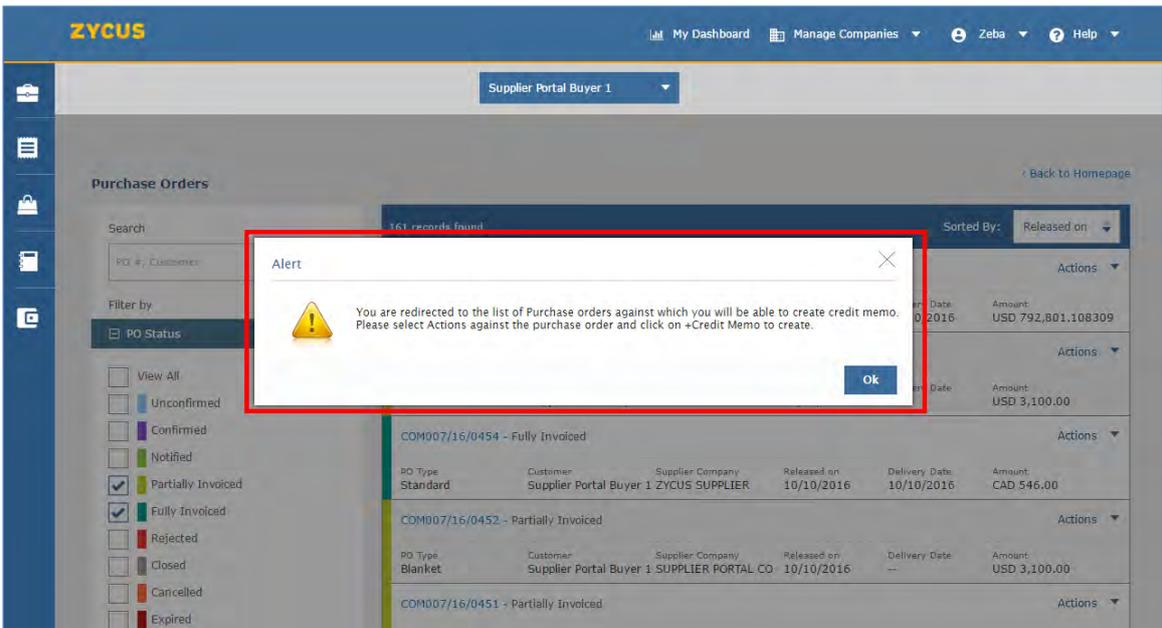
2. The users will have the option to create a credit memo right from the side panel menu.
3. There are two types of credit memo anyone can create:
  - Credit Memo against a PO(Purchase Order)
  - Credit Memo without reference
4. **Credit Memo against a PO** is generally created when the supplier would like to credit the supplier against any previous order received from the customer.
5. **Credit Memo without reference** is created when the supplier would like to credit any previous purchase without any particular **Purchase order**.
6. The supplier can select create option from the **Side panel** menu or they have the option from the **Invoices** listing.



**Note:** While creating Credit Memos the supplier will be able to see an option to add Return Freight & Extra charges if the settings to allow so have been enabled from the buyers end.

### 6.7.5 How to create Credit Memo Against a PO

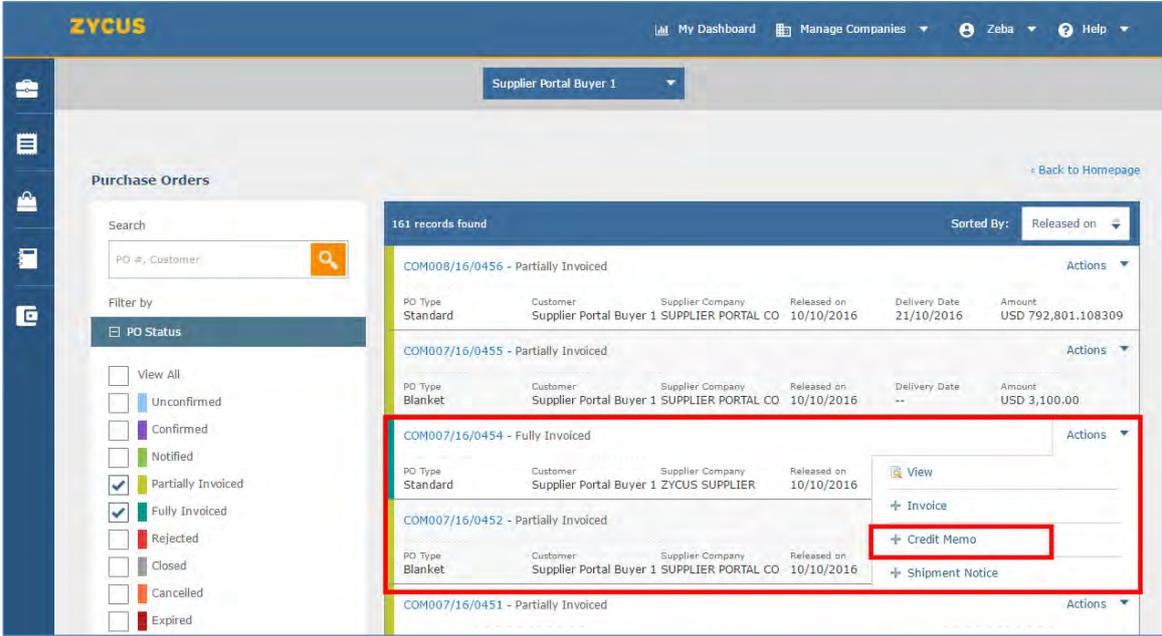
1. To create a Credit Memo against a PO the user can select the Create option from the side panel menu or the option from the Invoices listing page.
2. Once the user clicks on create against a PO then he will be redirected to the Purchase Orders listing where the User can select + Credit Memo against the order which he would like credit.



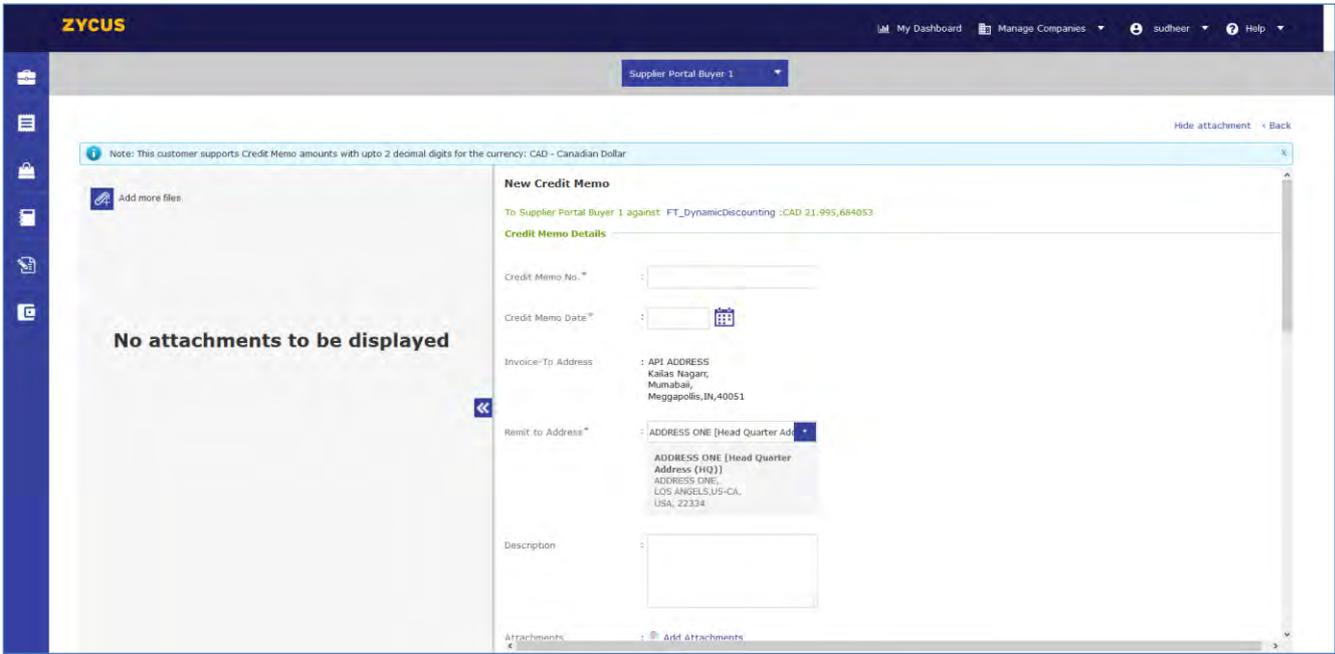
7. The user can select **Actions > + Credit Memo against the PO.**

**Note:** You can create credit memo against only those PO's which are partially or fully invoiced.

8. The user can credit the customer up till the invoiced quantity/amount.



9. Once the user clicks +Credit Memo they will be taken to the below page where he will be able to add the credit memo details.



**NOTE:** Credit Memo will automatically validate values as per customer specific decimal precision.

10. Add mandatory **credit memo details** such as:

- Credit Memo Number
- Credit Memo Date

- Remit to Address

11. Under the **Item Details** section, select the items for which you want to create a credit memo.

**Item details**

There are no Items in the Credit memo [?](#)  Change multiple

<input type="checkbox"/>	Line No.	Item No.	Item Name	UOM	Market Price	Unit Price	Ordered Qty/Amt	Invoiced Qty/Amt	Credited Qty/Amt	Credit Qty/Amt	Taxes	Total Price	Actions
<input checked="" type="checkbox"/>	1	N/A	Item	EA	INR 10,000	INR 10,000,000	10	10	0	10,000	INR 0,000,000	INR 100,000,000	
<b>Item Sub-Total:</b>											INR 100,000,000		

You can view/update mandatory information such as:

- Line No.
- Short Description
- Product Category
- Item Type
- Invoice By
- Amount
- Market Price
- Quantity & UOM
- Milestone Name (only for items with Milestone flag)
- Milestone Number (only for items with Milestone flag)

**Note:** The values of the above fields for Milestone items will be flipped from the PO just like they do from all line items. Actions will be available at line level and not at milestone level. The apportionment of other charges, freight, discount for the items with milestones will have no impact on any milestone.

Line No.	Item No.	Item Description and Supplier	UOM	Market Price	Unit Price	Invoiced Qty/Amt	Credited Qty/Amt	Credit Qty/Amt	Taxes	Total Price	Actions
1		Cleaning & Labour Services	N/A	N/A	N/A	USD 80,000.00	USD 40,000.00	USD 30.00	USD 0.00	USD 2000.00	
		<b>Serial No.</b>	<b>Milestones</b>	<b>Milestones Percentage</b>		<b>Invoiced Qty/Amt</b>	<b>Credited Qty/Amt</b>	<b>Credit Qty/Amt</b>			
		1	Cleaning Services	50%		USD 40,000.00	USD 20,000.00	USD 20.00			
		2	Floor Mat Dry Cleaning	50%		USD 40,000.00	USD 20,000.00	USD 10.00			
2		Cleaning & Labour Services	N/A	N/A	N/A	USD 100.00	USD 50.00	USD 50.00	USD 0.00	USD 100.00	
<b>Item Sub-total:</b>										USD 2200.00	
<b>Total Discount on Item Sub-Total:</b>										American dollar 0.000000	

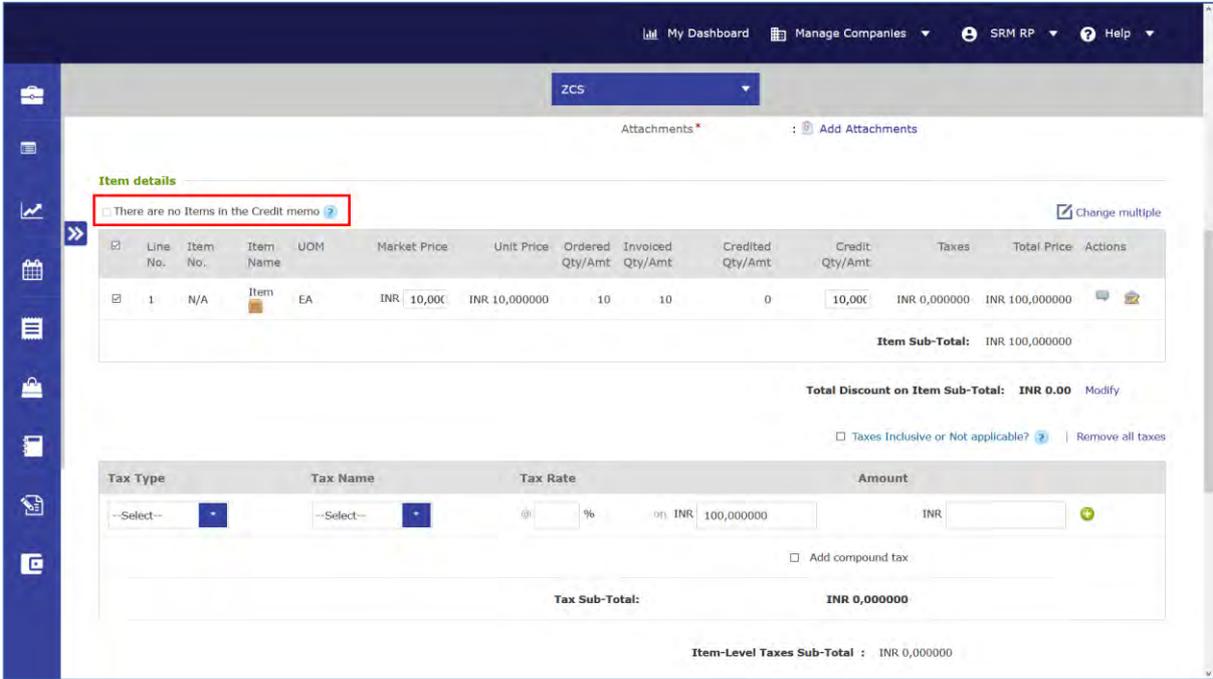
12. You can add taxes to the line items by clicking the icon. You will see the following popup:

Taxes ✕

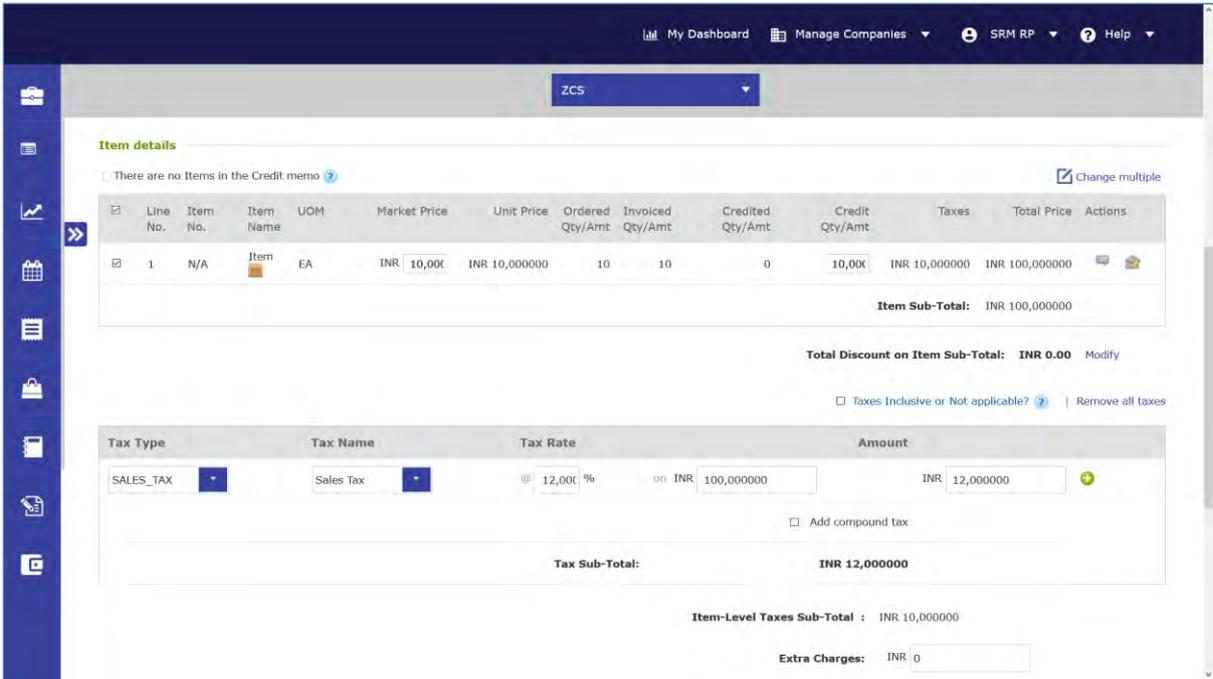
Taxes inclusive or Not applicable on this item? [?](#) Remove all taxes

Tax Type	Tax Name	Tax Rate	Amount
eInv_Sanity_Tax	eInv_Sanity_Tax	23 % on USD 1480	USD 340.4
Tax_Type_Auto	Tax_Name_Auto	5.55 % on USD 1480	USD 82.14
<b>Tax Sub-Total:</b>			-USD 258.26
plus 0 taxes from the header			

- 13. Suppliers will now be able to include negative taxes while generating an Invoice on the Supplier Network. While adding taxes at the header/line level on an invoice, suppliers can simply put in the “-ve” sign to indicate that it is a negative tax.
- 14. To add tax, select **Tax Type** and **Tax Name** from the drop-down list. Based on this selection, modify the **Tax Rate %** as per the norms.
- 15. The user also has options to create an item-less credit memo against a PO.



16. You can also apply taxes at header level as shown in the image below:



17. Add Taxes to the line items. To add tax, select **Tax Type** and **Tax Name** from the drop-down list. Based on this selection, modify the **Tax Rate %** as per the norms.
18. Both –ve tax rate and/or –ve tax amount can be entered. –ve tax rate/amount indicates withholding taxes.
19. When –ve taxes are added, the discounted item total, on which the tax is applicable, can be edited.

**Note:** You can type a tax name which is not present in the drop-down list.

**Note:** Taxes input will be rounded off as per customer-specific decimal precision

**Note:** If the locale of your profile is set to the language of your choice, the tax-type and tax-rate will also be reflected in the same language.

20. After you complete entering all information, click **Submit**.

#### Viewing Credit Memos with Milestone items

The credit memos created with have milestone details displayed for the items as shown below:

**ZYCUS**
My Dashboard | Manage Companies | AnujaM | Help

Show Attachment | Back

**LOREM IPSUM TEST** American dollar 600.00 Ready for appointment.

To: Zycus@gmail.com PO #2766: American dollar 610.00

---

**Credit Memo Details**

Credit Memo No.: LOREM IPSUM TEST  
 Supplier Company: GALAXY CORP  
 Description: lorem ipsum  
 Credit Memo Date: 2019/05/24  
 Payment Terms: NET30  
 Comments: -  
 Attachments: No Attachments

Invoice To Address: Santa Clara  
 3000 Tahmery Way,  
 Santa Clara, California, United States, 95054

Remit to Address: 91 LK AVE (Head Quarter Address (HQ))  
 91 LK AVE,  
 YONKERS, U, 10704

Bill To Address: Santa Clara  
 3000 Tahmery Way,  
 Santa Clara, California, United States, 95054

Ship To Address: -  
 Ship From Address: -

---

**Item details**

Line No.	Item No.	Item Description and Supplier	UOM	Market Price	Unit Price	Invoice Qty/Amt	Credited Qty/Amt	Credit Qty/Amt	Taxes	Total Price	Actions
1		Cleaning & Labour Services	N/A	N/A	N/A	USD 80,000.00	USD 40,000.00	USD 30.00	USD 0.00	USD 2000.00	
		<b>Serial No.</b>	<b>Milestones</b>		<b>Milestones Percentage</b>	<b>Invoice Qty/Amt</b>	<b>Credited Qty/Amt</b>	<b>Credit Qty/Amt</b>			
		1	Cleaning Services		50%	USD 40,000.00	USD 20,000.00	USD 20.00			
		2	Floor Mat Dry Cleaning		50%	USD 40,000.00	USD 20,000.00	USD 10.00			
2		Cleaning & Labour Services	N/A	N/A	N/A	USD 100.00	USD 50.00	USD 50.00	USD 0.00	USD 100.00	
<b>Item Sub-total: USD 2200.00</b>											
<b>Total Discount on Item Sub-Total:</b>										<b>American dollar 6.000000</b>	
Tax Type	Tax Name	Tax Rate	Amount								
No taxes selected for this invoice											
plus specific taxes on 0 line items											
Tax Type	Tax Name	Tax Rate	Amount								
No freight taxes applied for this invoice											

© 2019 Zycus Inc. All Rights Reserved
Invoice: zycus@gmail.com PO #2766: American dollar 610.00
Terms of Use | Privacy Policy | Powered by ZYCUS

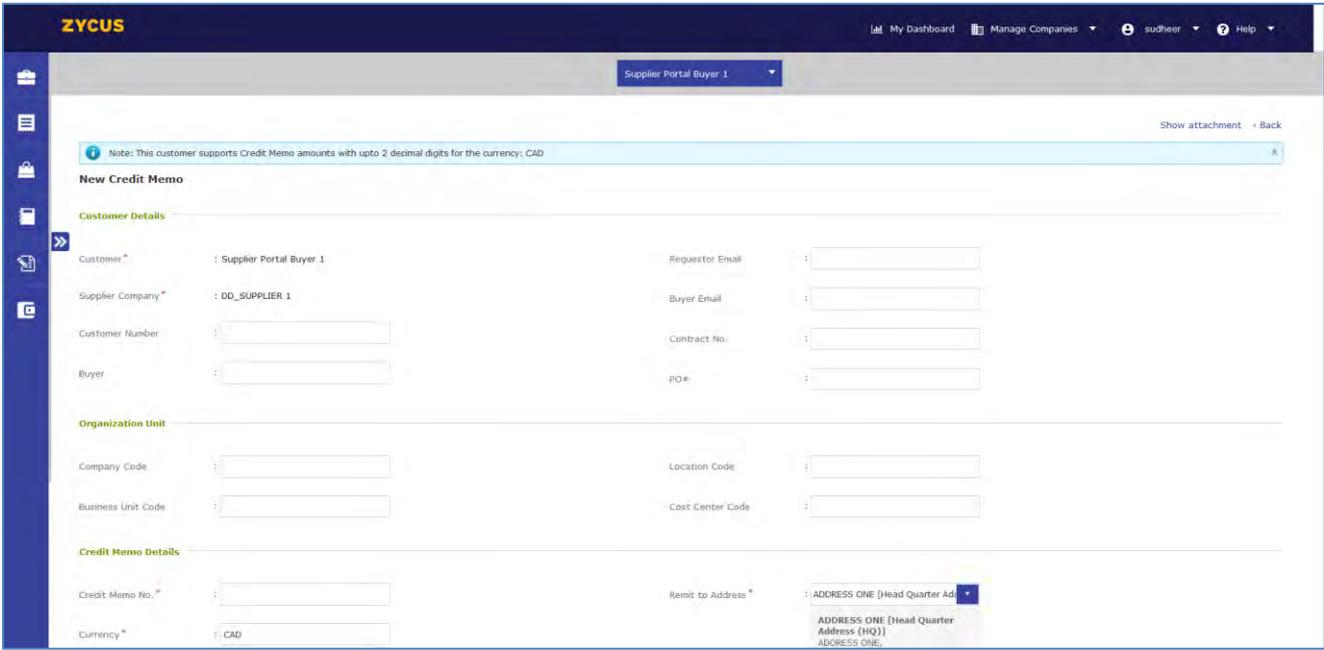
### 6.7.6 How to create Credit Memo without Reference

- 1. The user can also create a credit memo without reference.
- 2. From the side panel, go to **My Invoices > Create Credit Memo without Reference** > select your customer.

**Note:** If you do not see your customer company listed here, please get in touch with your contact at your customer company.

If your company profile is put on hold by your customer, then you won't be able to create a Credit Memo without PO Reference for that customer.

- 3. In case the user selects create without reference then the user will be directly taken to the credit memo creation page where he will be able to add the line level details or even create an item less credit memo similar to the PO type creation.



**Note:** Here you have a flexibility to add **Requestor Email ID**.

4. The credit memo without reference, the user will have to add all the details such as:

- Customer Details
- Organization Unit information
- Credit Memo Details
- Item Details
- Taxes on the items (here you can add –ve taxes to indicate withholding taxes)

5. Under the **Item Details** section, select the items for which you want to create a credit memo.

Line No.	Item No.	Item Name	UOM	Market Price	Unit Price	Ordered Qty/Amt	Invoiced Qty/Amt	Credited Qty/Amt	Credit Qty/Amt	Taxes	Total Price	Actions
1	N/A	Item	EA	INR 10,000	INR 10,000000	10	10	0	10,000	INR 0,000000	INR 100,000000	

**Item Sub-Total:** INR 100,000000

You can view/update mandatory information such as:

- Line No.
- Short Description
- Product Category
- Item Type
- Invoice By
- Amount
- Market Price
- Quantity & UOM

6. You can add taxes to the line items by clicking the icon. You will see the following popup:

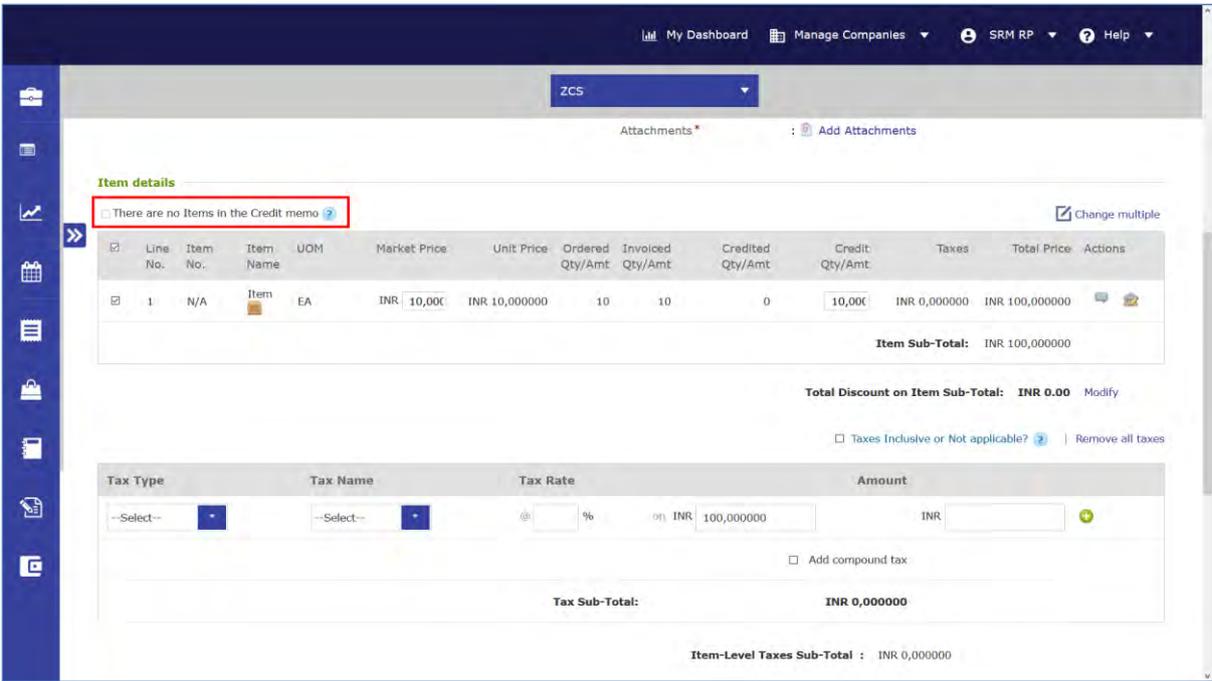
Tax Type	Tax Name	Tax Rate	Amount
eInv_Sanity_Tax	eInv_Sanity_Tax	-23 %	USD 340.4
Tax_Type_Auto	Tax_Name_Auto	5.55 %	USD 82.14

**Tax Sub-Total:** -USD 258.26  
plus 0 taxes from the header

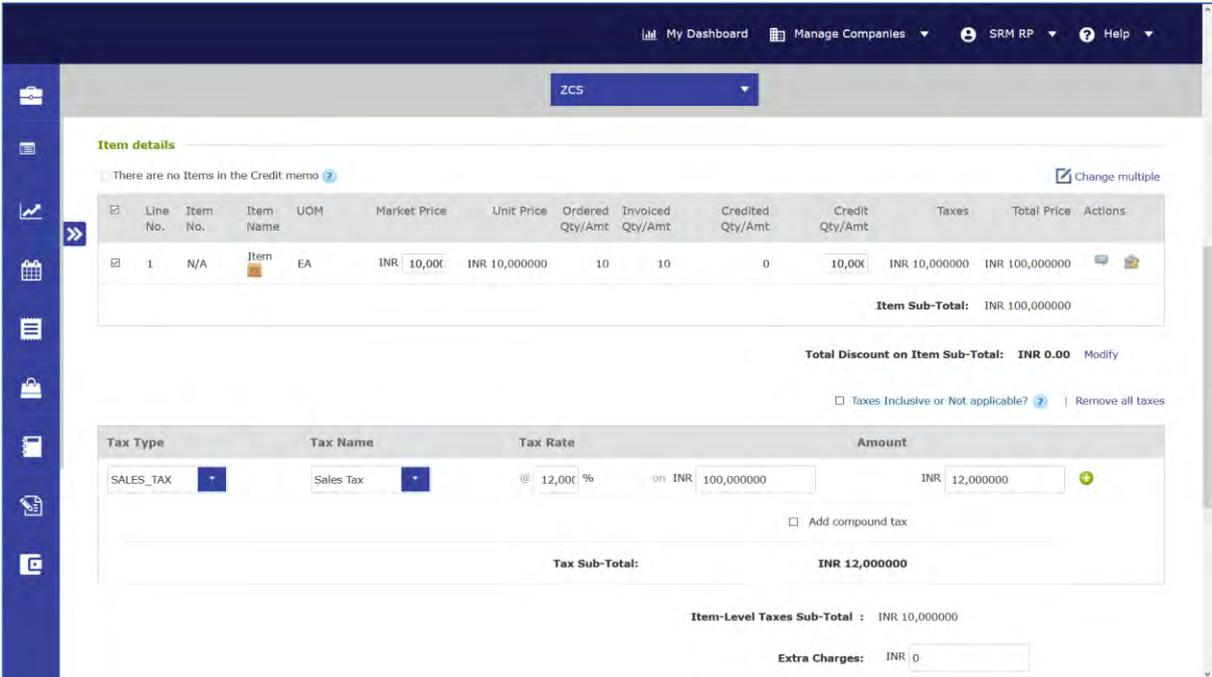
7. Suppliers will now be able to include negative taxes while generating an Invoice on the Supplier Network. While adding taxes at the header/line level on an invoice, suppliers can simply put in the “-ve” sign to indicate that it is a negative tax.

8. To add tax, select **Tax Type** and **Tax Name** from the drop-down list. Based on this selection, modify the **Tax Rate %** as per the norms.

9. The user also has options to create an item-less credit memo against a PO. Checking this box will grey out the item and the same credit memo can be used as item-less credit memo.



10. You can also apply taxes at header level as shown in the image below:



11. Add Taxes to the line items. To add tax, select **Tax Type** and **Tax Name** from the drop-down list. Based on this selection, modify the **Tax Rate %** as per the norms.
12. Both –ve tax rate and/or –ve tax amount can be entered. –ve tax rate/amount indicates withholding taxes.
13. When –ve taxes are added, the discounted item total, on which the tax is applicable, can be edited.

**Note:** You can type a tax name which is not present in the drop-down list.

**Note:** Taxes input will be rounded off as per customer-specific decimal precision

**Note:** If the locale of your profile is set to the language of your choice, the tax-type and tax-rate will also be reflected in the same language.

14. Once the details are added, submit the credit memo for apportionment.

**6.7.7 Credit Memo handling on ZSN**

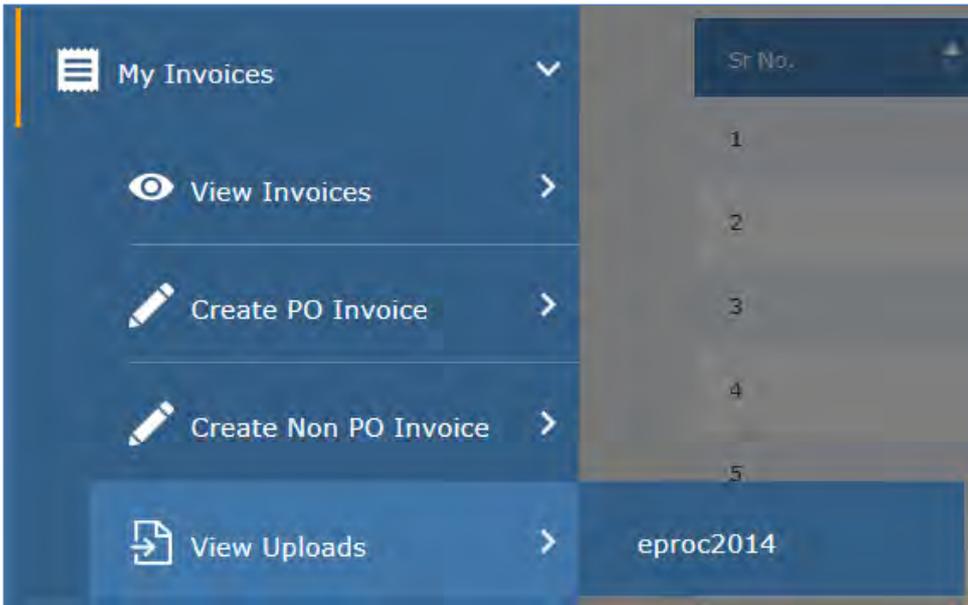
- 1. Once the user creates a credit memo against a PO, then that invoiced quantity/amount will be credited which will allow the user to create invoices against the PO for the same quantity again.
- 2. The credit memo once submitted will be sent to eInvoice for AP manager to review, where the status of Credit Memo will be **Ready for Apportionment**.
- 3. Once the Credit memo is adjusted against any invoice that needs to be paid for the supplier, then the credit memo will be used and the status will be **Apportioned** on ZSN.
- 4. The user will also have option to create credit memo from **My Uploads** section using already uploaded scanned file.

**6.7.8 How to View Uploads in eInvoice?**

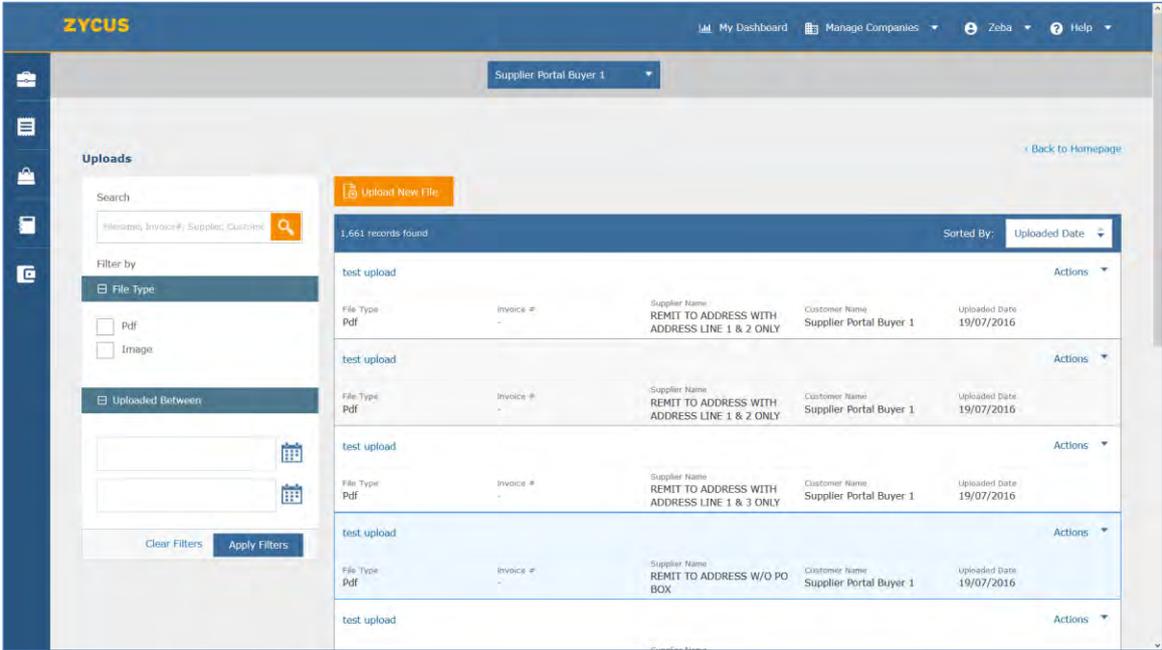
- 1. The **View Uploads** option allows the user to view the documents uploaded by you for a customer.

**NOTE:** Files under uploads will be visible only to you and not to your customer.

- 2. Click on **My Invoices**. Hover over **View Uploads**. You will be able to see list of customers for which you can check your uploads.

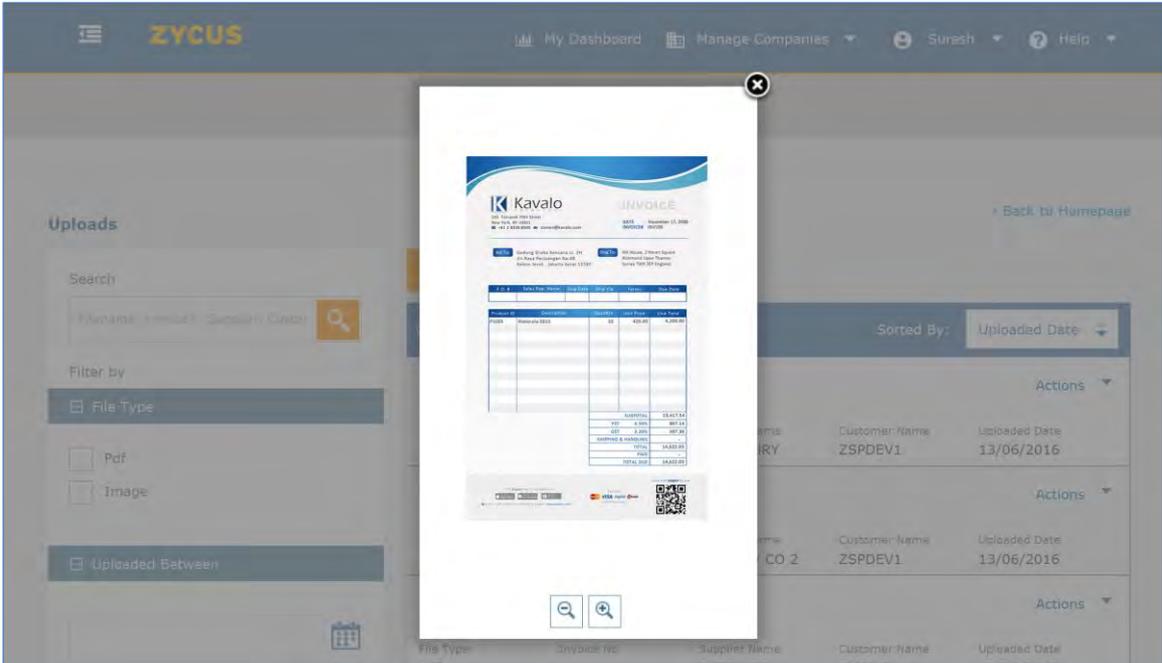


3. Select the customer for which you want to view the upload. You will be redirected to the following page:



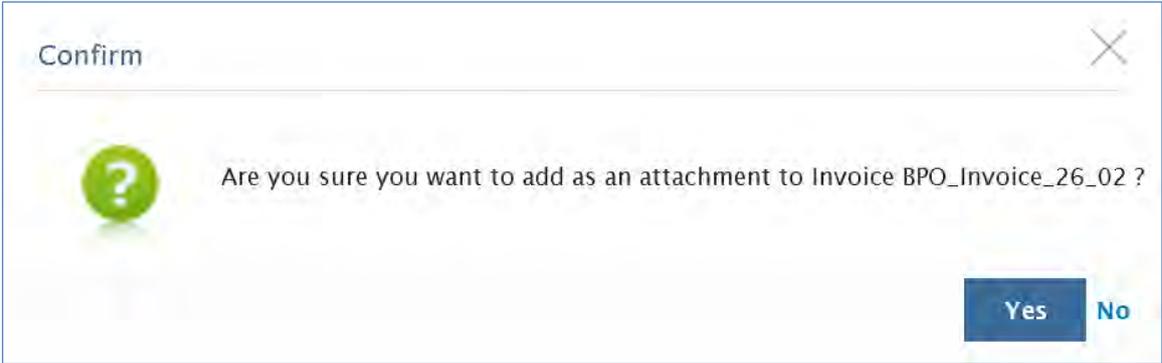
4. Click on **Actions** drop-down menu to:

- a. View the upload
  - You can upload files with format **.jpg;\*.jpeg;\*.gif;\*.png;\*.bmp;\*.pdf.**
  - You can filter the files as **Pdf** or **Image**.
  - Click on the file to preview it. The file will be displayed as shown below:



- b. [Create PO Invoice](#)
- c. [Create Non-PO Invoice](#)

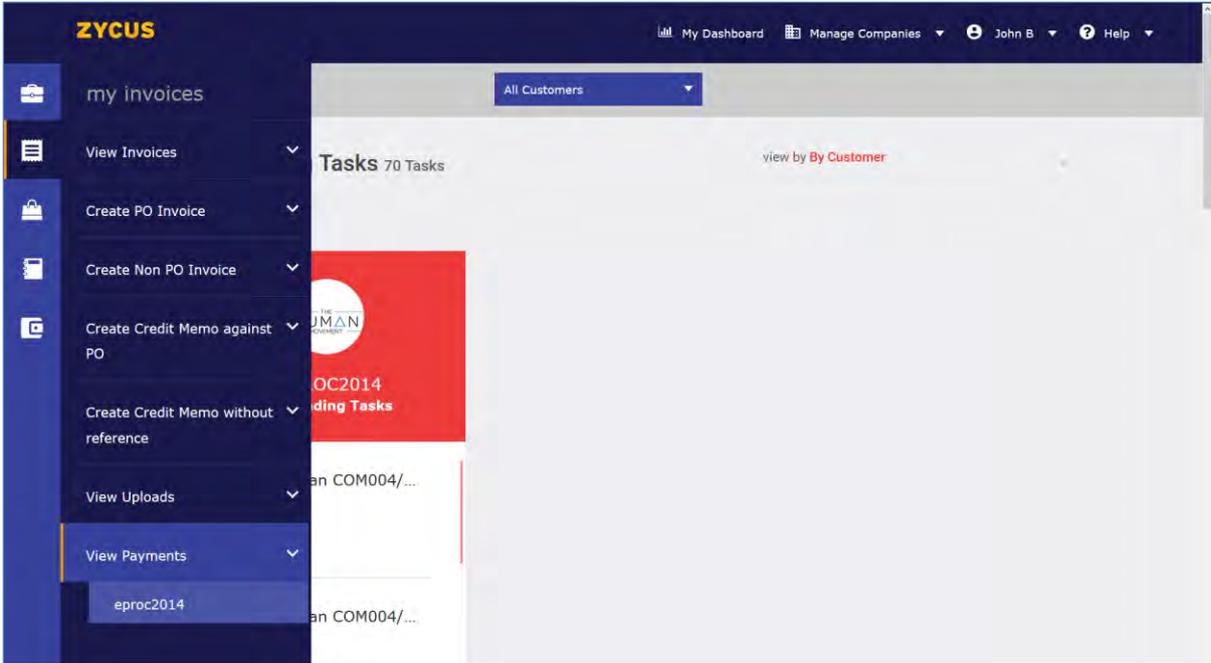
- d. [Create Credit Memo against PO](#)
- e. [Create Credit Memo without reference](#)
- f. Add as an Attachment:
  - When you click Add as Attachment, it will redirect you to the PO listing page, where you can attach the file to an existing PO which is in **Draft** stage or **Rejected**.
  - Click on the PO to which you want to attach the file, you will see the following popup:



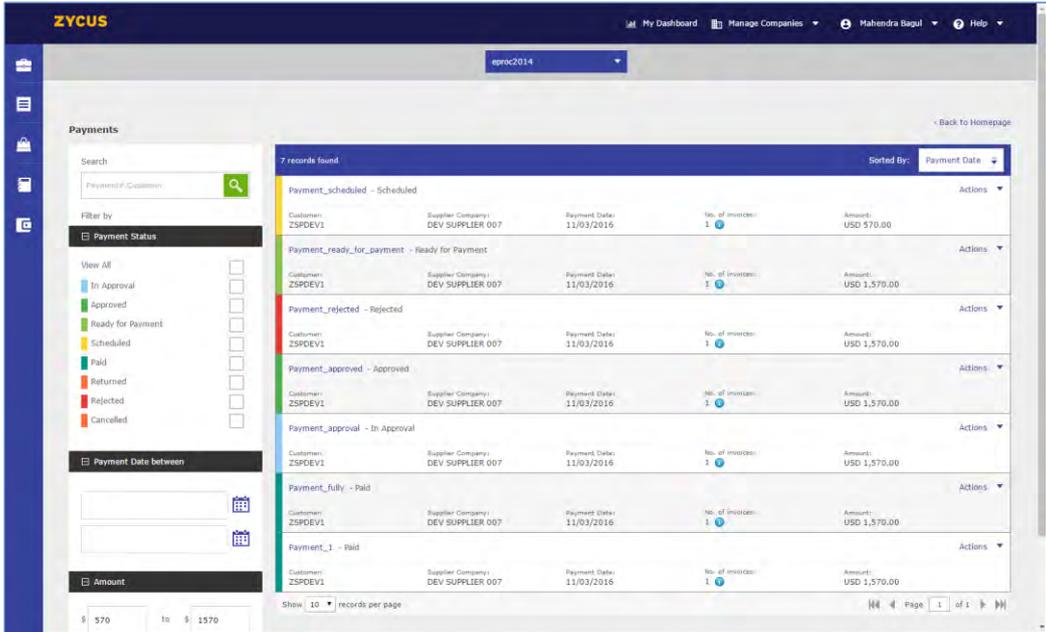
### 6.7.9 How to View Payments in eInvoice?

You will be able to see the payment status against the invoices you submit via ZSN in case your customer updates this information.

To view the payments, Navigate to the following location: **Side Panel > My Invoices > View Payments > Required customer company.**



1. You will be navigated to the following page:



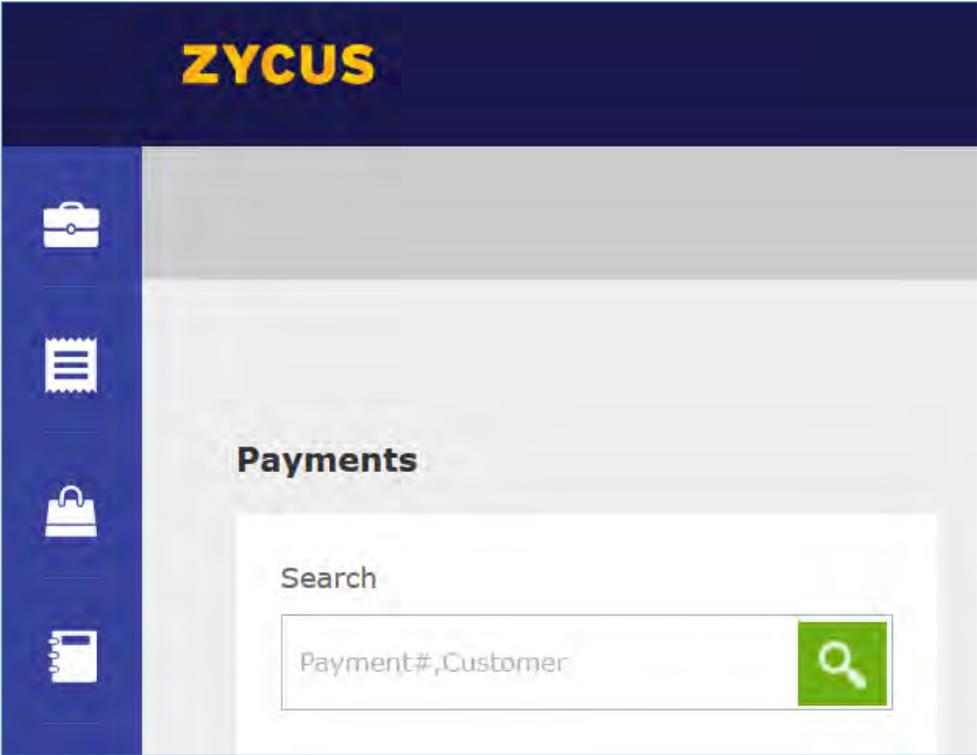
- 2. On the **Payments** page, you will be able to view following details for each payment:
  - Payment Reference Number
  - Customer
  - Payment date
  - No of Invoices Paid (hover on **i**, the invoices number will be showed)
  - Payment amount - currency to be appended in front of the amount
  - Payment status

3. The User can perform the following operations using the **View Invoices** sub tab:

- Search Payments
- Filter Payments
- Sort Payments
- View Payments

**6.7.9.1 Searching Payments**

- 1. You can search for payments by **Payment Number** and **Customer** on the **Payments** listing page as shown below:



6.7.9.2 Filtering Payments

You can filter the payments based on the following parameters:

- **Payment status:** Select a status to view the invoices under that particular status.

Filter by

Payment Status

View All

In Approval

Approved

Ready for Payment

Scheduled

Paid

Returned

Rejected

Cancelled

- **Payment Date between:** Select start and end date using the icon to view payments dated between the selected date ranges.

Payment Date between

23/11/2016

30/11/2016

- **Amount:** Using the slider, select the start and end amount to view payments whose amount lies in the selected amount range. **OR** Enter the start and end amount in the text boxes.

The image shows a filter interface for 'Amount'. At the top, there is a header with a menu icon and the text 'Amount'. Below this, there are two input boxes, each containing '\$ 0', with the word 'to' between them. A horizontal slider bar is positioned below the input boxes. At the bottom of the interface, there are two buttons: 'Clear Filters' and 'Filter'.

- Click **Filter** after selecting/enabling the required filters to filter the invoices.

**6.7.9.3 Sorting Payments**

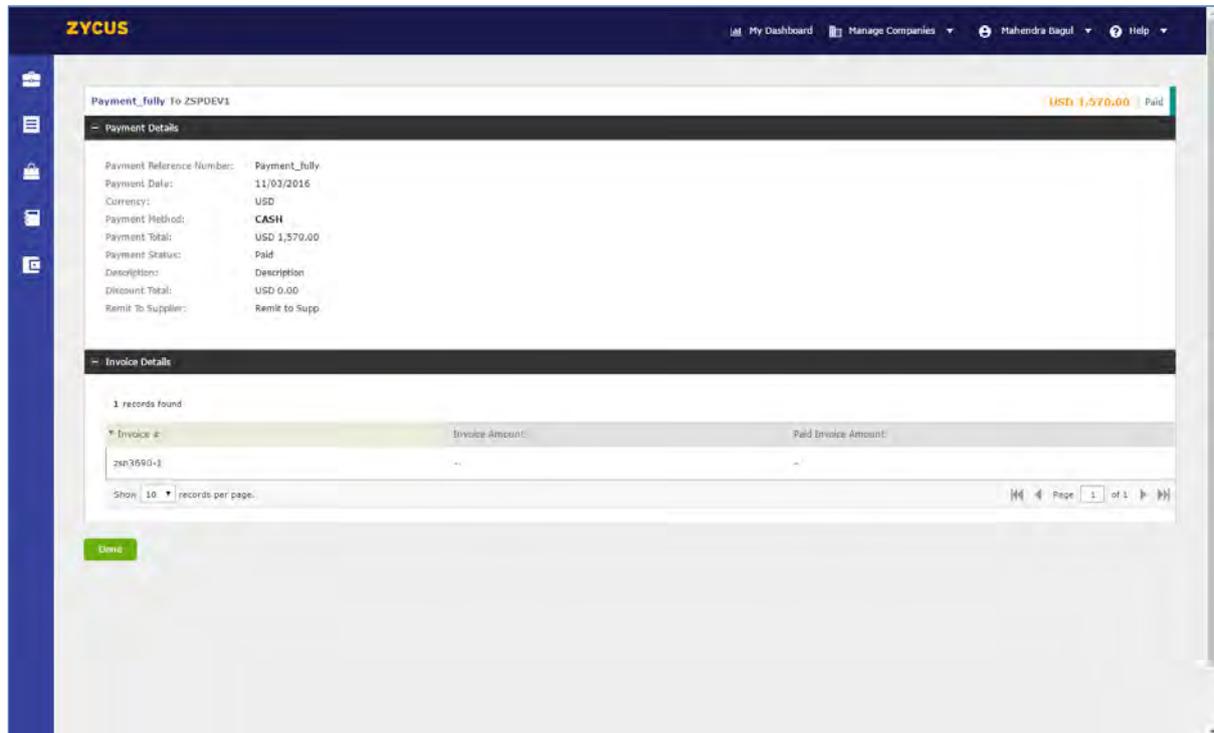
1. You can sort the entries on **Payments** by:
  - Customer Name
  - Payment Number
  - Payment Date
  - Amount

The image shows a 'Sorted By' dropdown menu. The header of the dropdown is 'Sorted By: Payment Date' with a downward arrow. The dropdown menu is open, showing four options: 'Customer', 'Payment #', 'Payment Date', and 'Amount'. The 'Payment Date' option is currently selected and highlighted.

**Note:** The entries on the **Payment** page will be sorted in descending order.

### 6.7.9.4 Viewing Payments

1. For a given payment, under the **Actions** column, click **View** to view the payment details. You will be navigated to the following page:



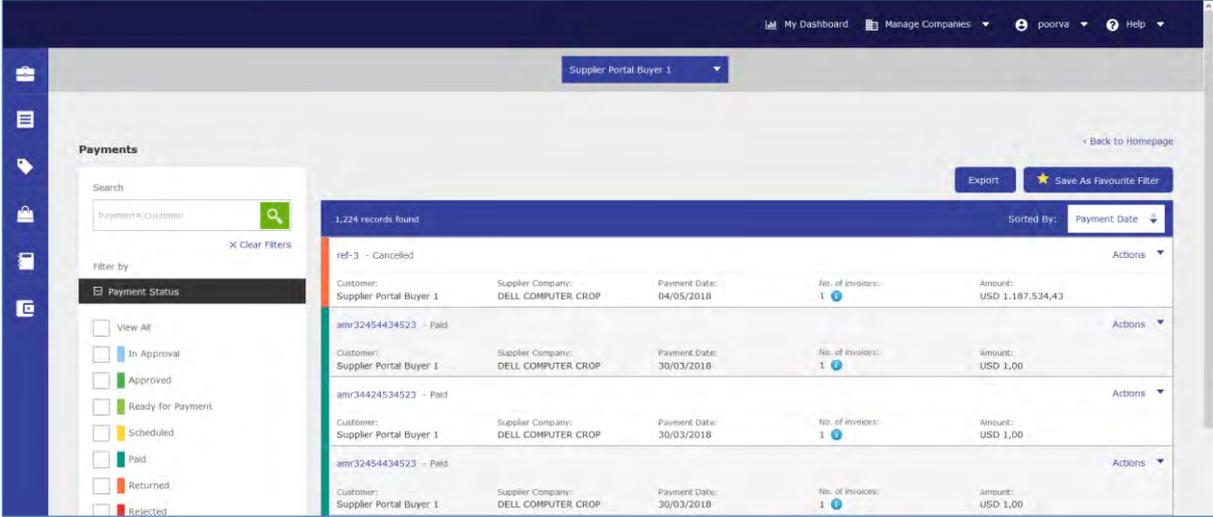
2. You can also view the payment details page by click on the **Payment Reference Number**.

**Note:** You can also add **Payments** card on the **ZSN** home page.

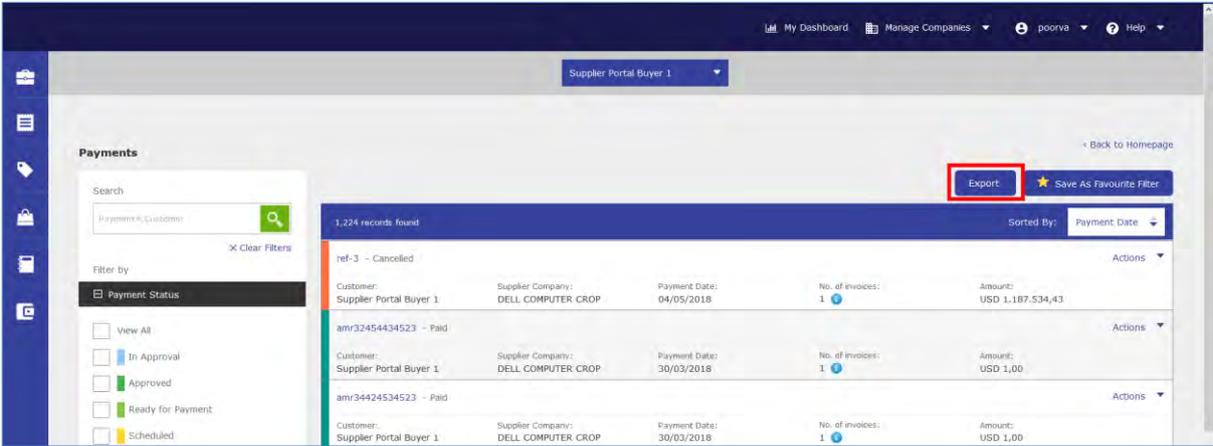
### 6.7.9.5 Exporting Payment Details

From this listing page, you have an option to download details of all your payments. To download the payment details, follow the steps below:

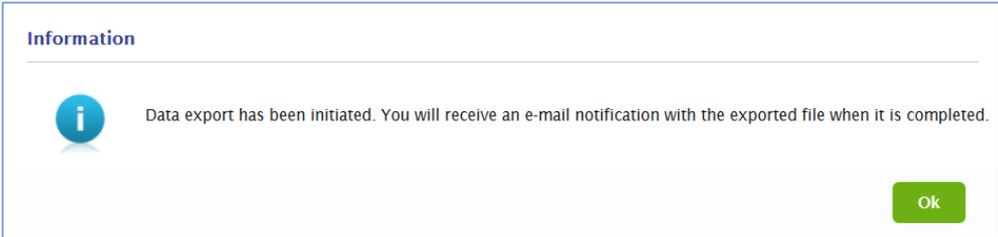
- 1. Navigate to Payment listing page from **Side Panel > My Orders > View PO > Customer Name**. You will land on the following page:



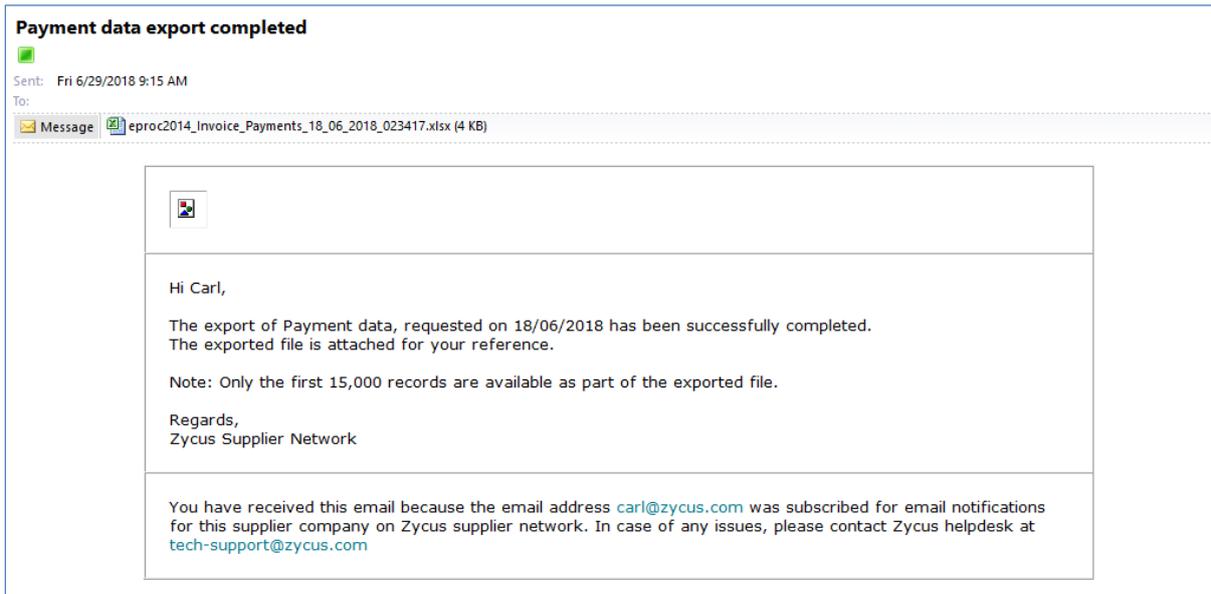
- 2. To export the Payment details, click **Export** as highlighted in the image below:



- 3. Clicking **Export**, you will see the following popup which will notify you that data export is in progress and you will be notified through an email once the file export is complete. Click **Ok**.



- 4. Once the file is ready, you will receive the exported file (attached) to your registered email ID as shown below:



5. Open the file to view your Payment details:

Payment Reference Number	Supplier Company	Payment Date	Payment Status	Document No.	Document Amount	Discount Amount	Adjustment Amount	Total Payment Amount
PMY001	Galaxy Corp.	04-27-2018	Paid	INV0002	NZD 200	-	-	NZD 100
PMY002	Galaxy Corp.	04-30-2018	Paid	INV0003	NZD 250	NZD 50	-	NZD 100
PMY003	Galaxy Corp.	04-30-2019	Paid	INV0003	NZD 250	NZD 50	-	NZD 100
PMY004	Galaxy Corp.	1/5/2018	Paid	INV0004	NZD 300	-	-	NZD 500
PMY004	Galaxy Corp.	1/5/2018	Paid	INV0005	NZD 200	-	-	NZD 500

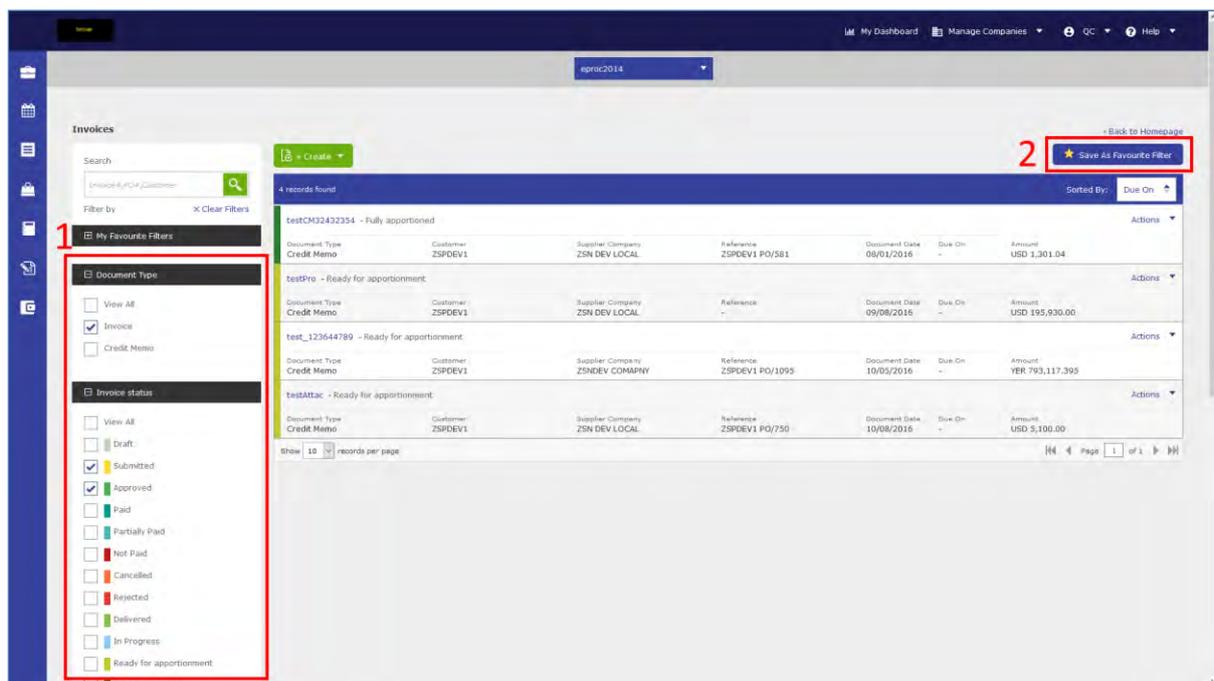
**Note:** The data exported will be as per the filter applied on the listing page. You will be able to view the applied filters in the exported file as well. The maximum limit on the number of records exported is 15,000. Records beyond 15,000 will not be part of the exported file.

## 6.7.10 Marking Filters as Favorites

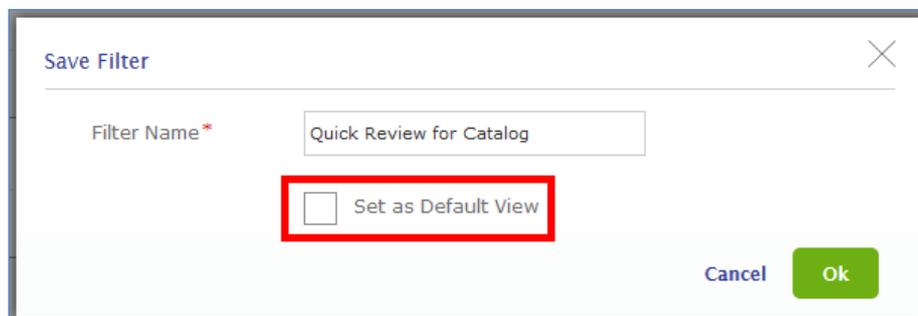
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

To mark filter as favorite,

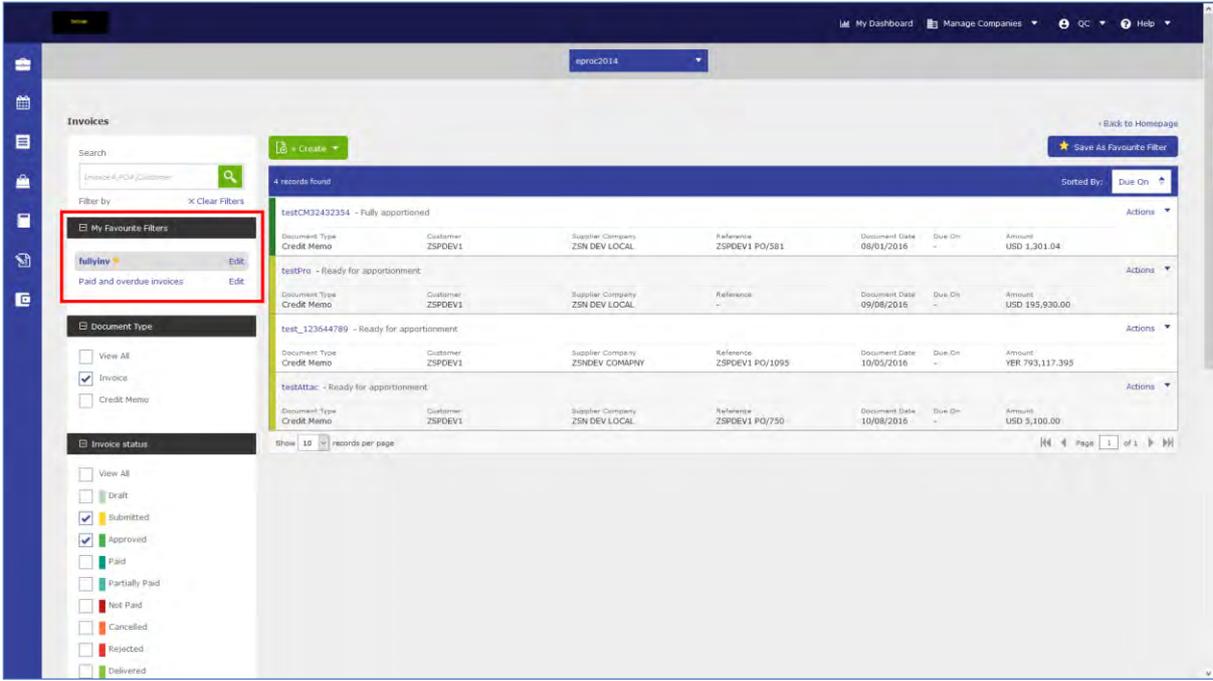
1. Select the filter parameters from the left panel and click the **Save as Favorite Filter** button as shown in the image below:



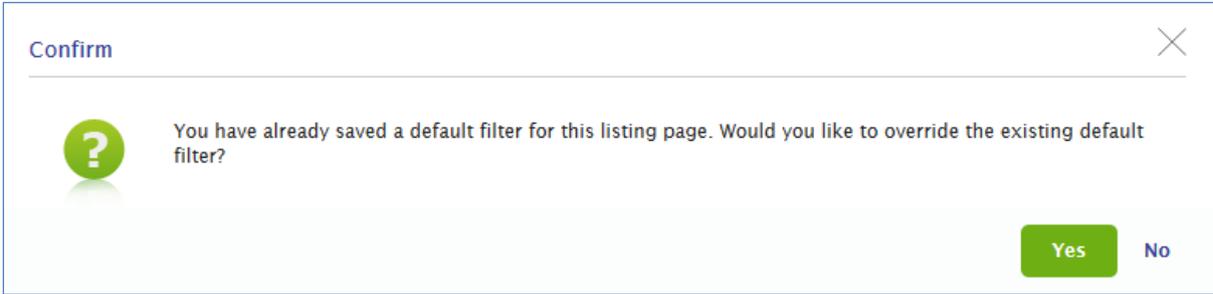
2. Once you choose to save a filter, you will have to name it as shown below:



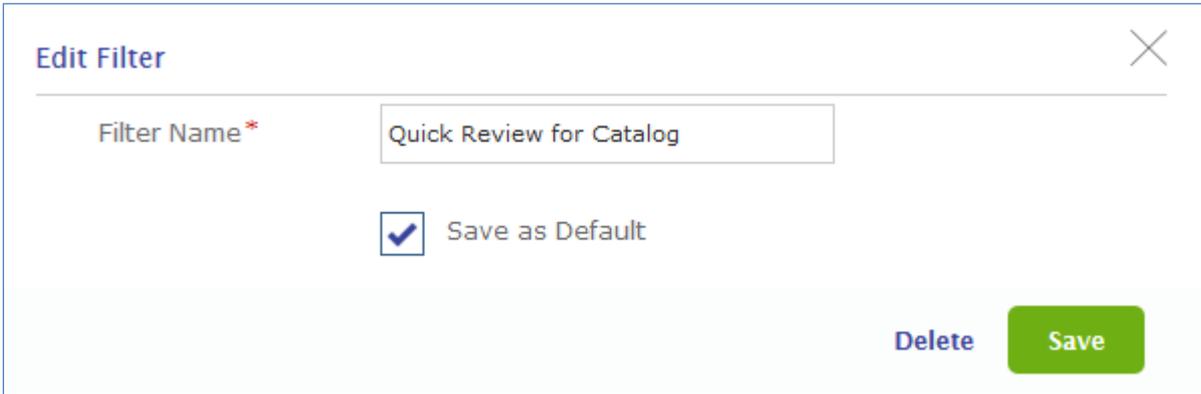
3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.
4. Saved filters will be available in the left panel of the listing page as shown below:



5. You can have only one filter set as default. If you make another filter as default, then it will override the existing favorite filter and you will be notified as shown below:



- 6. Click **Yes** if you wish to override the existing default filter.
- 7. To remove a filter from favorite, go to the left panel and click **Edit** against a filter.



8. Uncheck the box against **Save as Default** and click **Save**.
9. If you wish to delete a filter, click **Delete** in the popup shown above.

### 6.8 My Orders

**NOTE:** The above-mentioned menu may or may not be available based on the access provided to you by customer.

The **My Orders** option allows the user to view Orders sent you by your customers.

**Purchase Orders**

Search: PO #, Customer, Location

Filter by:

- PO Status
  - View All
  - Unconfirmed
  - Confirmed
  - Notified
  - Partially Invoiced
  - Fully Invoiced
  - Rejected
  - Closed
  - Cancelled
  - Expired
- PO Type
  - View All
  - Standard
  - Blanket
  - Release
- Received In last: [ ] days
- Released between:
  - Release Start Date: [ ]
  - Release End Date: [ ]
- Amount: \$ 0 to \$ 124324187

2,134 records found. Sorted By: Released on

PO Type	Customer	Supplier Company	Released on	Number of Items	Delivery Location	Delivery Date	Amount
<b>ZSPDEV1 PO/1408 - Confirmed</b>							
Blanket	ZSPDEV1	BARCLAYS	2017/02/08	1	Pune	--	USD 15,000,00
<b>ACMENG/17/168 - Confirmed</b>							
Blanket	ZSPDEV1	BARCLAYS	2017/02/08	1	Pune	--	USD 15,000,00
<b>ACMENG/17/167 - Confirmed</b>							
Blanket	ZSPDEV1	BARCLAYS	2017/02/08	1	Pune	--	USD 15,000,00
<b>ACMENG/17/166 - Fully Invoiced</b>							
Standard	ZSPDEV1	BARCLAYS	2017/02/06	1	Pune	--	USD 20,000,00
<b>ACMENG/17/165 - Confirmed</b>							
Standard	ZSPDEV1	BARCLAYS	2017/02/06	1	Pune	--	USD 15,000,00
<b>123456 - Confirmed</b>							
Standard	ZSPDEV1	BARCLAYS	2017/02/03	1	Pune	--	USD 5,000,00
<b>Test_Mail - Confirmed</b>							
Standard	ZSPDEV1	ZSN DEV CO 2	2017/02/03	2	Pune	--	USD 125,744,320,584
<b>email_Test11 - Unconfirmed</b>							
Standard	ZSPDEV1	ZSN DEV CO 2	2017/02/03	1	testing scope	--	USD 984,859,339,464
<b>ACMENG/17/164 - Confirmed</b>							
Standard	ZSPDEV1	BARCLAYS	2017/02/03	1	Pune	2017/02/28	USD 5,000,00
<b>EmailTest111 - Unconfirmed</b>							
Standard	ZSPDEV1	ZSN DEV CO 2	2017/02/02	1	testing scope	--	USD 984,859,339,464

Show 10 records per page. Page 1 of 214

**Note:** You can view the Deliver To location on the PO listing page itself.

The User can perform the following operations using the **My Orders** tab:

2. Search Orders (Refer **Searching Invoices**)
1. Filter Orders (Refer **Filtering Invoices**)
2. Sort Orders (Refer **Sorting Invoices**)
3. Confirm/Reject Orders
4. View Orders (Refer
- 5.
6. **Viewing Invoices**)
7. Send Shipment Notice for the Orders (Refer **How to Create a Shipment Notice?**)
8. Send Invoices for the Orders (Refer
- 9.
10. **Creating Invoice**)
11. Download Order Details as PDF (Refer **Download PO as PDF**)
12. Preview PO cXML (Refer
13. **Preview PO cXML**)

### 6.8.1 How to Confirm/Reject a Purchase Order?

1. Navigate to the following location: Side Panel > **My Orders** > **View Orders** > Required Customer Company.

The screenshot displays the 'Purchase Orders' section of the Zycus Supplier Network. The page header includes the Zycus logo and navigation links like 'My Dashboard', 'Manage Companies', 'Zoba', and 'Help'. A dropdown menu shows 'Supplier Portal Buyer 1'. The main content area features a search bar, filter options for 'PO Status' and 'PO Type', and a table of 587 records. The table columns are PO Type, Customer, Supplier Company, Released on, Delivery Date, and Amount. The table lists several purchase orders with their respective details and actions.

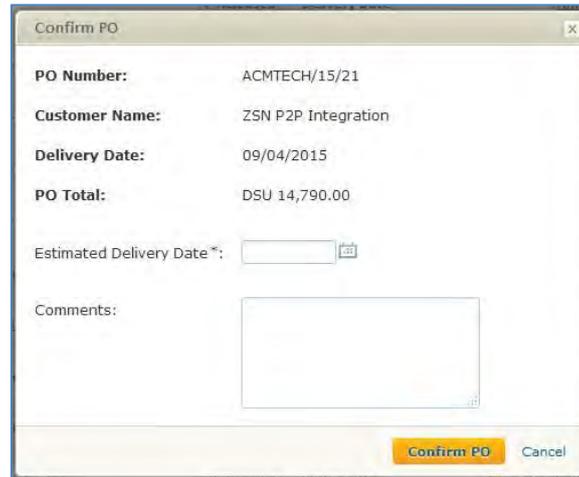
PO Type	Customer	Supplier Company	Released on	Delivery Date	Amount
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	06/09/2016	---	CAD 48,884.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	06/09/2016	06/09/2016	CAD 48,884.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	01/09/2016	---	CAD 30.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	RupZycus 50,239.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	RupZycus 0.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	SY 10,000.00

2. Look for the required purchase order using the Search, Filter or Sort options.

3. Perform any one of the following actions as per requirement:

**A. Approving PO:**

1. Click on the  **Confirm** icon corresponding to the required Purchase Order to approve the PO.



The 'Confirm PO' dialog box displays the following information:

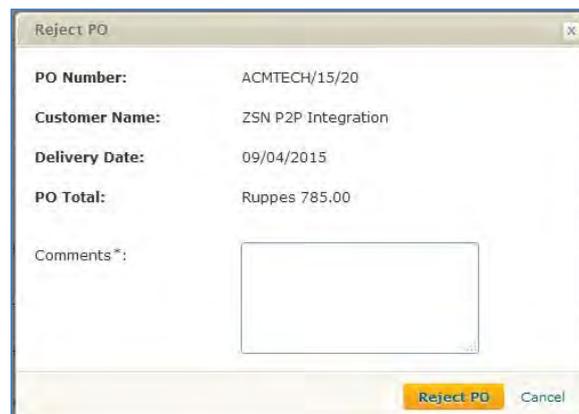
<b>PO Number:</b>	ACMTECH/15/21
<b>Customer Name:</b>	ZSN P2P Integration
<b>Delivery Date:</b>	09/04/2015
<b>PO Total:</b>	DSU 14,790.00
<b>Estimated Delivery Date*:</b>	<input type="text"/> 
<b>Comments:</b>	<input type="text"/>

Buttons: **Confirm PO** (yellow), **Cancel** (grey)

2. Select the **Estimated Delivery Date** for the Purchase Order.
3. Enter the required comments.
4. Click **Confirm PO** to approve the PO.

**B. Rejecting PO**

1. Click on the  **Reject** icon corresponding to the required Purchase Order to reject the PO.



The 'Reject PO' dialog box displays the following information:

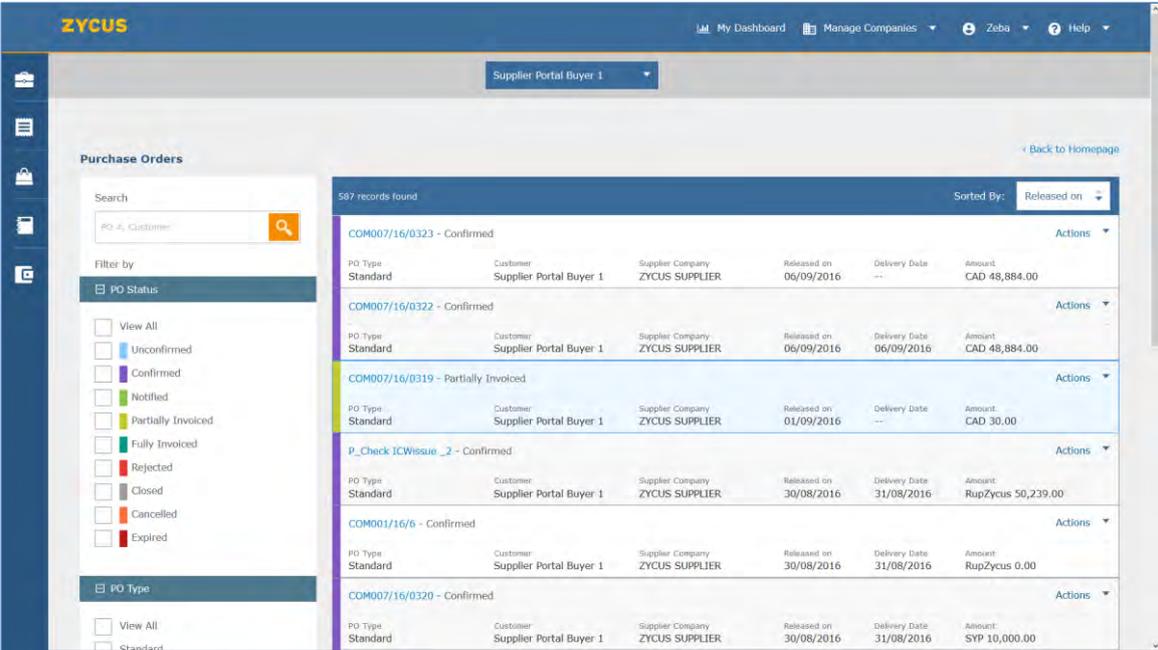
<b>PO Number:</b>	ACMTECH/15/20
<b>Customer Name:</b>	ZSN P2P Integration
<b>Delivery Date:</b>	09/04/2015
<b>PO Total:</b>	Rupes 785.00
<b>Comments*:</b>	<input type="text"/>

Buttons: **Reject PO** (yellow), **Cancel** (grey)

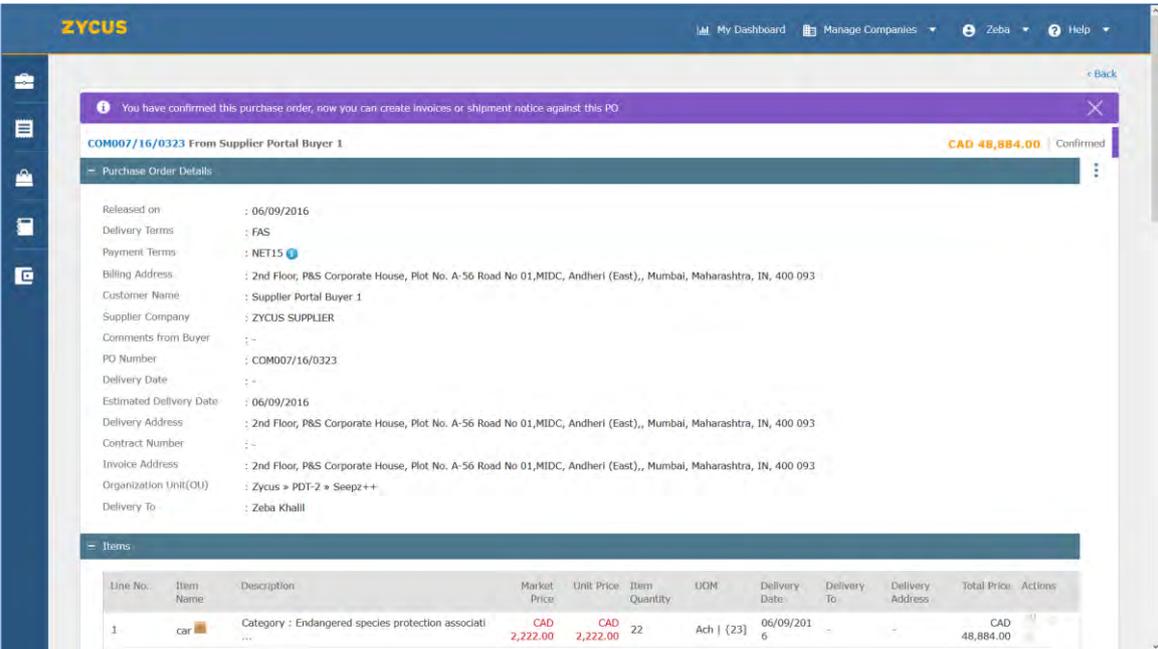
2. Enter the required comments.
3. Click **Reject PO** to reject the PO.

**Download PO as PDF**

1. Navigate to the following location: Side Panel > **My Orders**> **View Orders**> Required Customer Name.



2. Look for the required PO using the **Search, Filter** or **Sort** options.
3. Click on the **View PO** icon from menu corresponding to the required Invoice.



- Click on the menu and select **Download as PDF**.

### Preview PO cXML

- Navigate to the following location: Side Panel > **My Orders**> **View Orders** > Required Customer Company.

The screenshot displays the 'Purchase Orders' section of the Zycus Supplier Network. It features a search bar, filter options for PO Status and PO Type, and a table of PO records. The table shows 587 records found, sorted by 'Released on'. The records include PO numbers, types, customer names, supplier companies, release dates, delivery dates, and amounts.

PO Type	Customer	Supplier Company	Released on	Delivery Date	Amount
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	06/09/2016	---	CAD 48,884.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	06/09/2016	06/09/2016	CAD 48,884.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	01/09/2016	---	CAD 30.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	RupZycus 50,239.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	RupZycus 0.00
Standard	Supplier Portal Buyer 1	ZYCUS SUPPLIER	30/08/2016	31/08/2016	SYP 10,000.00

- Look for the required PO using the **Search**, **Filter** or **Sort** options.

- Click on the PO number to view PO.

**ZYCUS** My Dashboard Manage Companies Zeba Help

You have confirmed this purchase order, now you can create invoices or shipment notice against this PO

COM007/16/0323 From Supplier Portal Buyer 1 CAD 48,884.00 Confirmed

**Purchase Order Details**

Released on : 06/09/2016  
 Delivery Terms : FAS  
 Payment Terms : NET15  
 Billing Address : 2nd Floor, P&S Corporate House, Plot No. A-56 Road No 01,MIDC, Andheri (East),, Mumbai, Maharashtra, IN, 400 093  
 Customer Name : Supplier Portal Buyer 1  
 Supplier Company : ZYCUS SUPPLIER  
 Comments from Buyer : -  
 PO Number : COM007/16/0323  
 Delivery Date : -  
 Estimated Delivery Date : 06/09/2016  
 Delivery Address : 2nd Floor, P&S Corporate House, Plot No. A-56 Road No 01,MIDC, Andheri (East),, Mumbai, Maharashtra, IN, 400 093  
 Contract Number : -  
 Invoice Address : 2nd Floor, P&S Corporate House, Plot No. A-56 Road No 01,MIDC, Andheri (East),, Mumbai, Maharashtra, IN, 400 093  
 Organization Unit(OU) : Zycus » PDT-2 » Seepz++  
 Delivery To : Zeba Khallil

**Items**

Line No.	Item Name	Description	Market Price	Unit Price	Item Quantity	UDM	Delivery Date	Delivery To	Delivery Address	Total Price	Actions
1	car	Category : Endangered species protection associati...	CAD 2,222.00	CAD 2,222.00	22	Ach   (23)	06/09/2016	-	-	CAD 48,884.00	

4. Click on the **Actions** menu and select **Preview PO CXML**.

### *PO with Payment Milestones*

A PO with items with Milestone amount will be sent to ZSN. Suppliers will be able to Confirm/ Reject it from ZSN. After the PO is created and shared it will show up with corresponding section of milestone payments below the line items. To help differentiate the items with the billing plan linked to them, there will be a milestone flag next to name of the item.

**Purchase Order #2766 From Zycus** American dollar \$10.00 Partially Invoiced

**Purchase Order Details**

- Released on: 2019/04/23
- Delivery Terms: FOB
- Payment Terms: NET30
- Billing Address: 3000 Tannery Way, Santa Clara, California, United States, 95054
- Customer Name: Zycus
- Supplier Company: GALAXY CORP
- Comments from Buyer: -
- Purchase Order No.: PO #2766
- Delivery Date: 2019/04/25
- Estimated Delivery Date: 2019/04/25
- Delivery Address: 3000 Tannery Way, Santa Clara, California, United States, 95054
- Contract Number: -
- Invoice Address: 3000 Tannery Way, Santa Clara, California, United States, 95054
- Organization Unit(OU): Palo Alto Networks - Cloud Security - Santa Clara
- Delivery To: Charliez

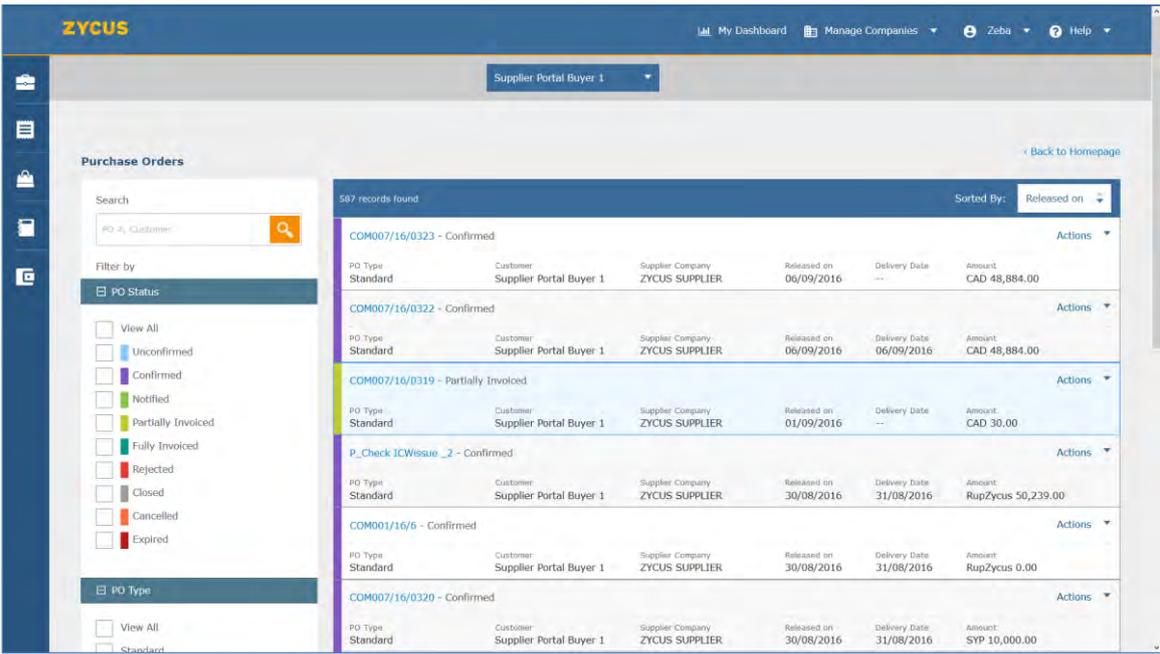
**Items**

Line No.	Item Name	Description	Market Price	Unit Price	Ordered Qty / Amt	UOM	Delivery Date	Delivery to	Delivery Address	Total Price	Actions
1	Cleaning Services	Category: Cleaning & Labour Services, Galaxy...	N/A	N/A	USD 108.00		2019/04/25	-	-	USD 70.10	
		<b>Serial No.</b>	<b>Milestones</b>	<b>Percentage</b>	<b>Ordered Qty / Amt</b>						
		1	Cleaning Services	30%	USD 30.00						
		2	Floor Mat Dry Cleaning	20%	USD 20.00						
		3	Window & Glass Cleaning	50%	USD 50.00						
2	Cleaning Services	Category: Cleaning and janitorial services, Galaxy...	N/A	N/A	USD 129.98		2019/04/25	-	-	USD 129.98	
										<b>Item Sub-total: USD 200.08</b>	
										<b>Total Discount on Item Sub-Totals: American dollar 0.000000</b>	
<b>Tax Type</b>	<b>Tax Name</b>	<b>Tax Rate</b>	<b>Amount</b>								
No taxes selected for the Purchase Order											
										<b>Item-Level Taxes Sub-Total:</b>	American dollar 0.000000
										<b>Freight Charges:</b>	American dollar 100.00
<b>Tax Type</b>	<b>Tax Name</b>	<b>Tax Rate</b>	<b>Amount</b>								
dstg	dst	10.000000 % (on American dollar: 100.000000)	American dollar: 10.000000								
										<b>Tax Sub-total:</b>	American dollar 10.000000
										<b>Total Tax Amount:</b>	American dollar 10.000000
										<b>Gross Total:</b>	American dollar 610.00

## 6.8.2 How to Create a Shipment Notice?

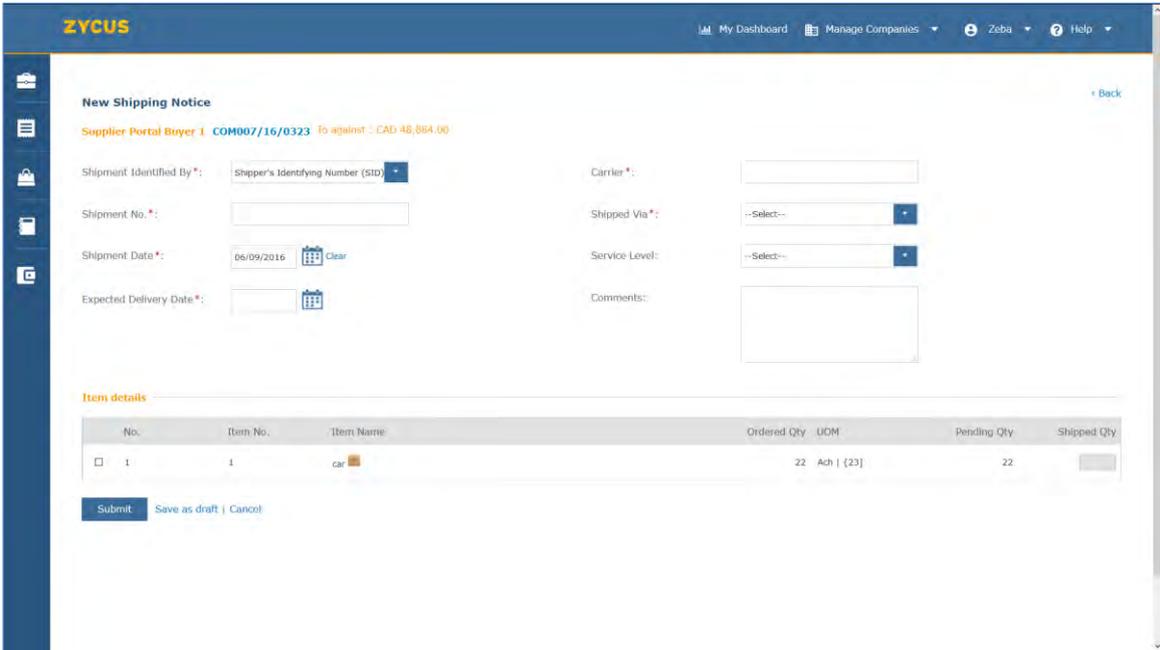
### To create a Shipment Notice for a Purchase Order:

1. Navigate to the following location: Side Panel > **My Orders**> View Orders > Required Customer Company
2. Look for the required purchase order using the Search, Filter or Sort options



3. Click on the **+ Shipment Notice** icon under actions  corresponding to the required Purchase Order.

4. Enter the required details on the **New Shipping Notice** page.



5. Select the items that are being shipped and enter their shipping quantity.

Item No.	Item No.	Item Name	Ordered Qty	UOM	Pending Qty	Shipped Qty
1	1	Laptop	149	EA	149	149
2	32	lot television	74	EA	74	74

Submit | Save as draft | Cancel

6. Perform any one of the following actions as required:

- A. **Cancel:** To discard the changes made in the shipment notice and exit.
- B. **Save as draft:** To save the changes made in the shipment notice and exit.
- C. **Submit:** To save the changes made in the invoice and submit the shipment notice for processing.

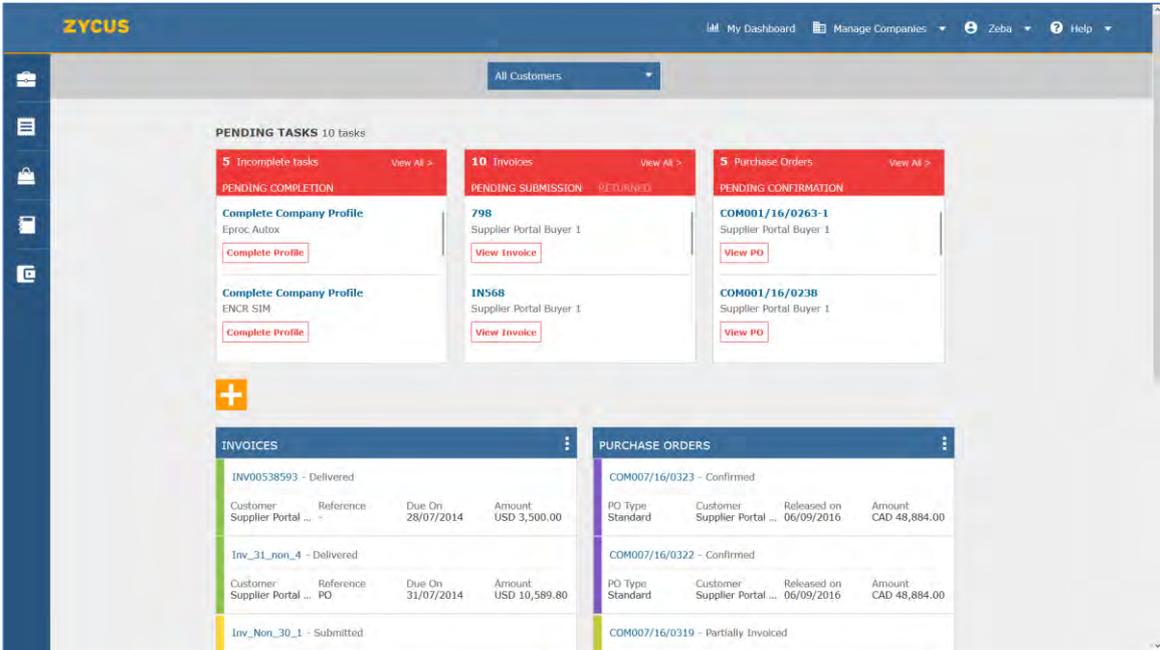


*Shipment notice can also be created using the **Create Shipment Notice** option under the **Actions** menu on the **View PO** page for the respective Purchase Order.*

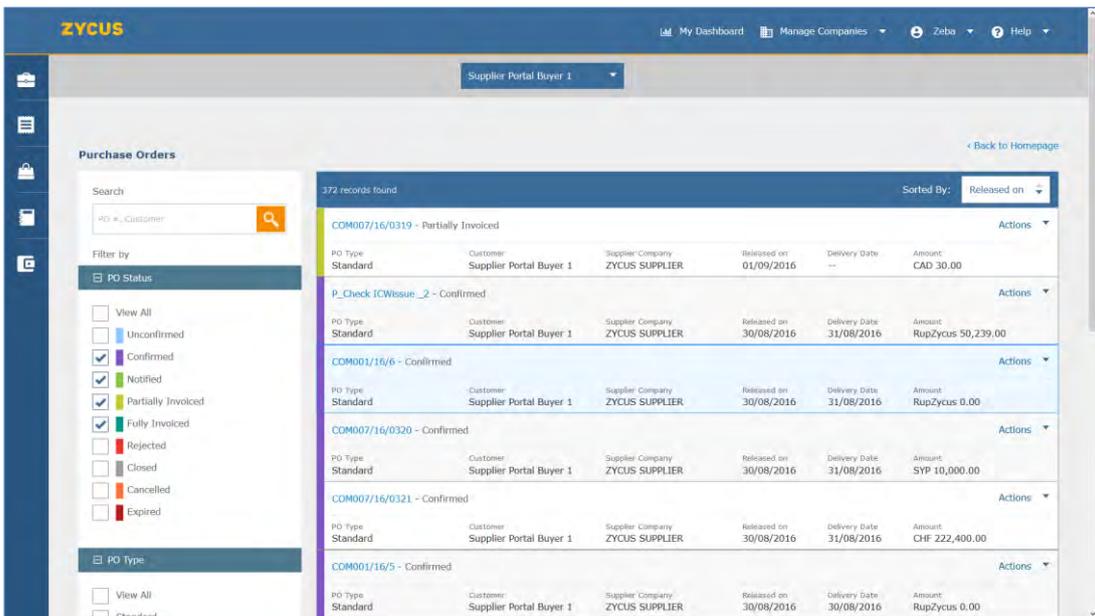
### 6.8.3 How to Create Direct Invoice against a Blanket Purchase Order?

The supplier can create an invoice against blanket order if the customer has given access to suppliers. Or else the suppliers can create invoice against release orders if the customer hasn't given access. In case of no access, the supplier can still view the blanket order for their reference.

3. On the landing page, select **Purchase Order** from the **Card Library**.



4. Click on **View More** to view the list of PO. You will be redirected to following page:



- On the left side panel, check on the filter in **PO Type** as **Blanket** and click on **Apply Filter**. All the blanket purchase orders will be listed.
- Select the BPO against which you want to make an invoice, click on **Actions** drop-down menu, and select **+ Invoice**.

zsn COM004/16/192 - Confirmed					Actions ▾
PO Type Blanket	Customer ZSPDEV1	Supplier Company ZSN DEV CO 1	Released on 02/01/2016	Deliver	+ Invoice

- Following page will be displayed. Fill in the details in the invoice.

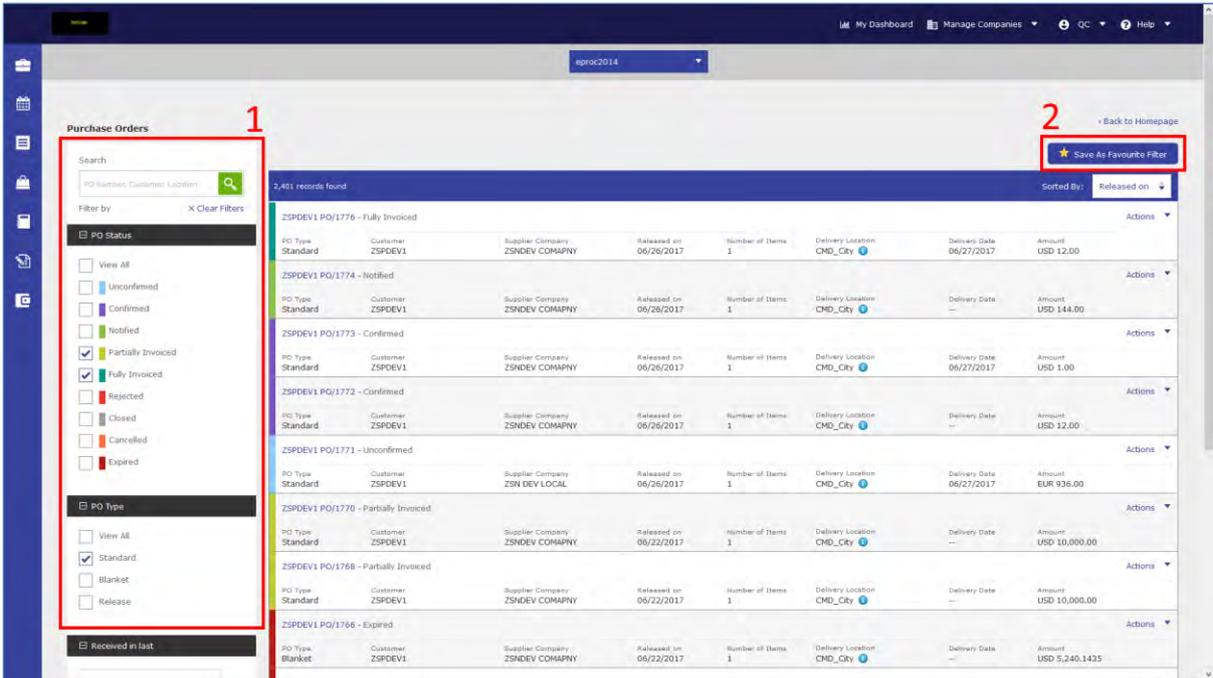
- Once you complete filling the invoice, you can submit or save the invoice as draft.

### 6.8.4 Marking Filters as Favorites

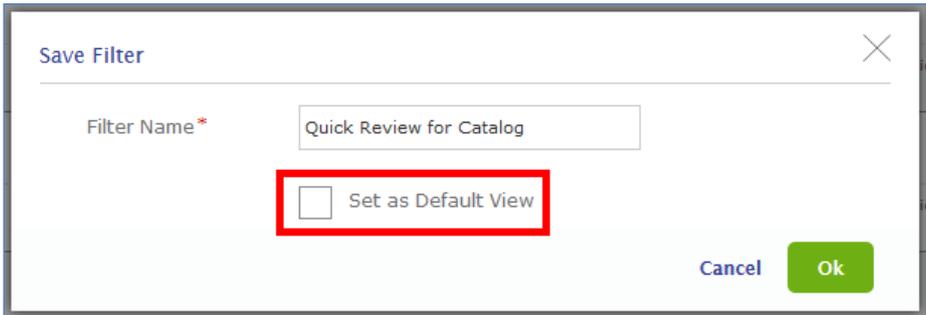
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

To mark filter as favorite,

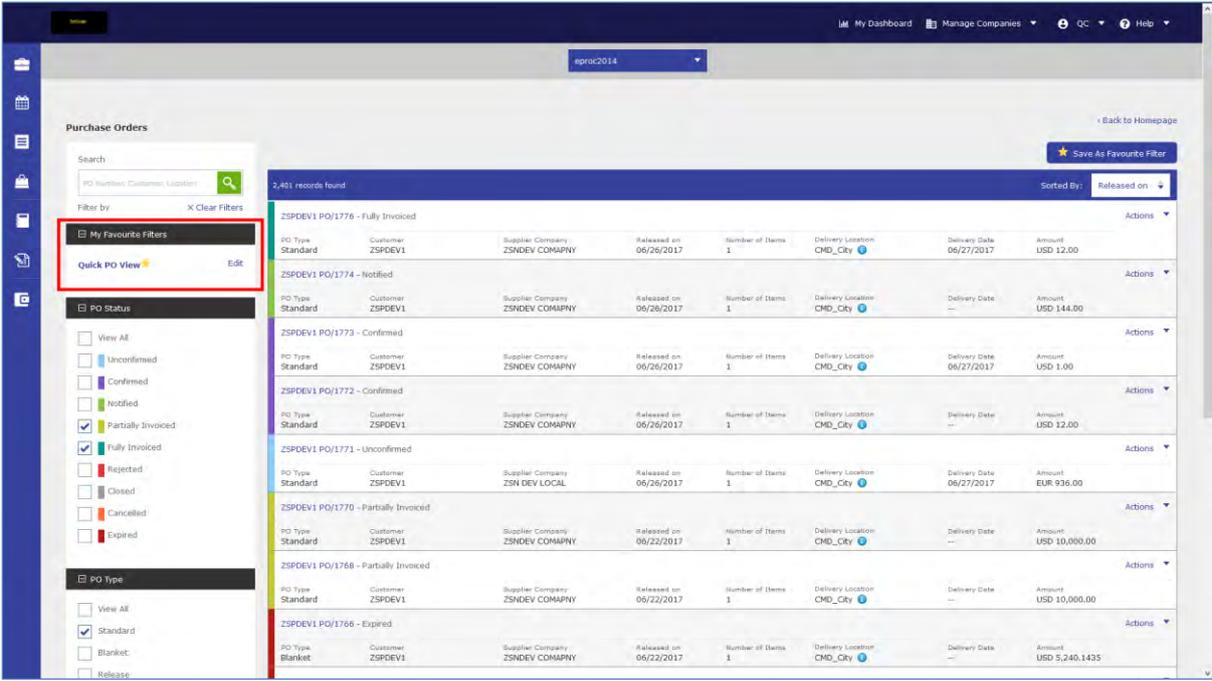
- 1. Select the filter parameters from the left panel and click the **Save as Favorite Filter** button as shown in the image below:



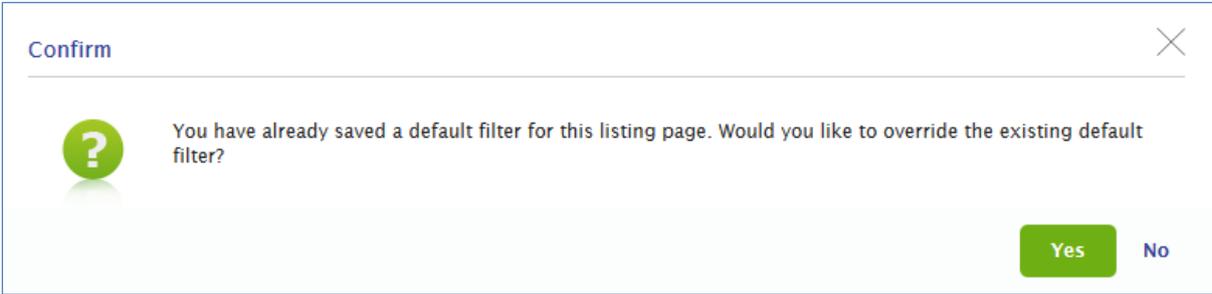
- 2. Once you choose to save a filter, you will have to name it as shown below:



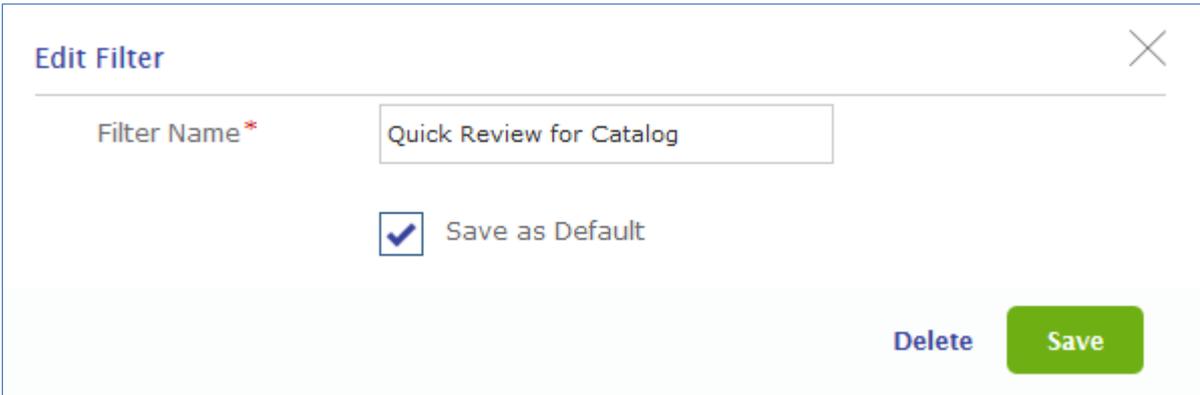
- 3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.
- 4. Saved filters will be available in the left panel of the listing page as shown below:



5. You can have only one filter set as default. If you make another filter as default, then it will override the existing favorite filter and you will be notified as shown below:



- 6. Click **Yes** if you wish to override the existing default filter.
- 7. To remove a filter from favorite, go to the left panel and click **Edit** against a filter.

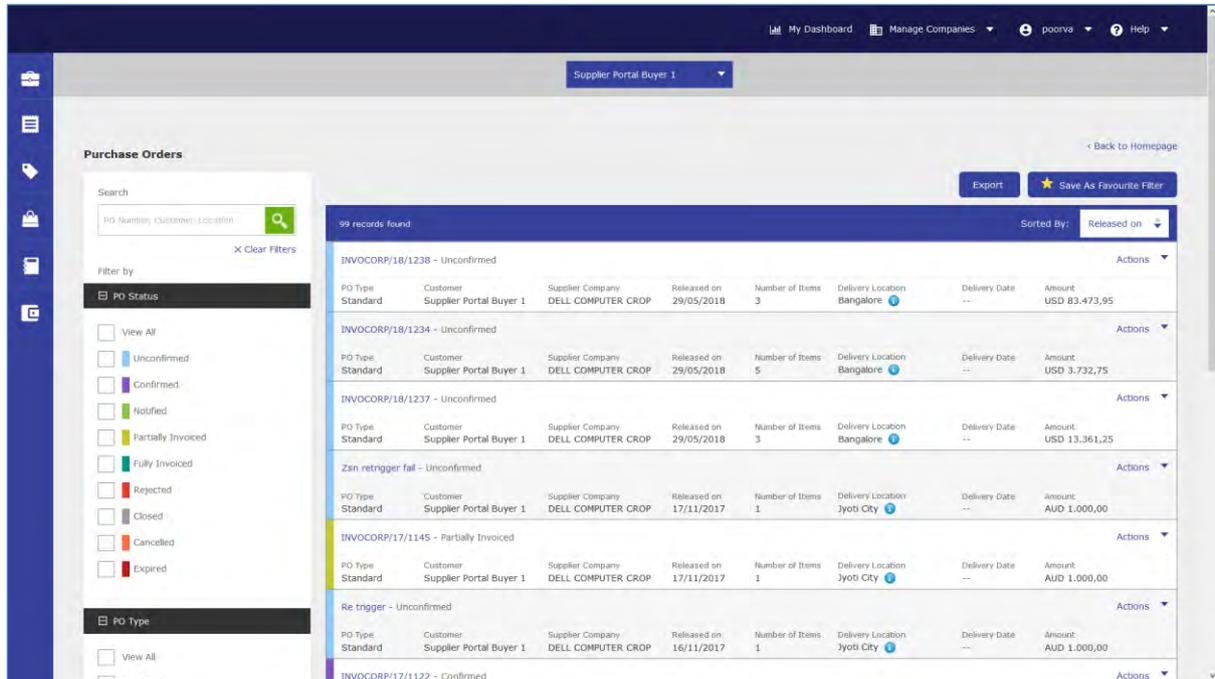


- 8. Uncheck the box against **Save as Default** and click **Save**.
- 9. If you wish to delete a filter, click **Delete** in the popup shown above.

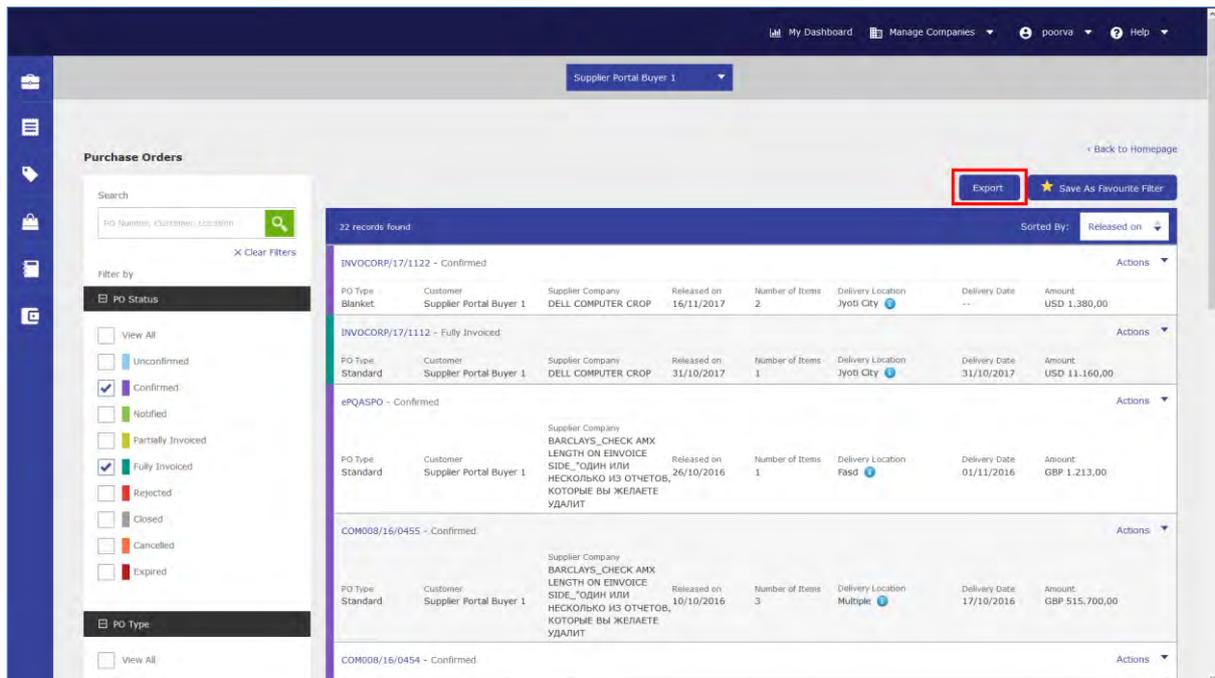
## 6.8.5 Exporting PO Details

From this listing page, you have an option to download details of all your PO's. To download the PO details, follow the steps below:

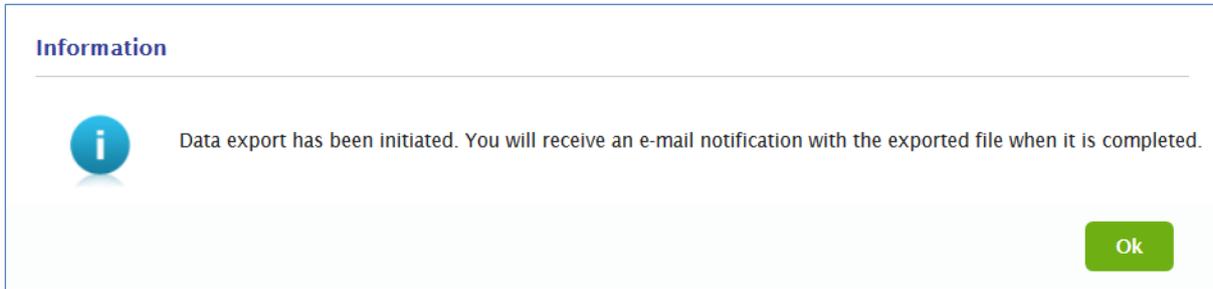
1. Navigate to PO listing page from **Side Panel > My Orders > View PO > Customer Name**. You will land on the following page:



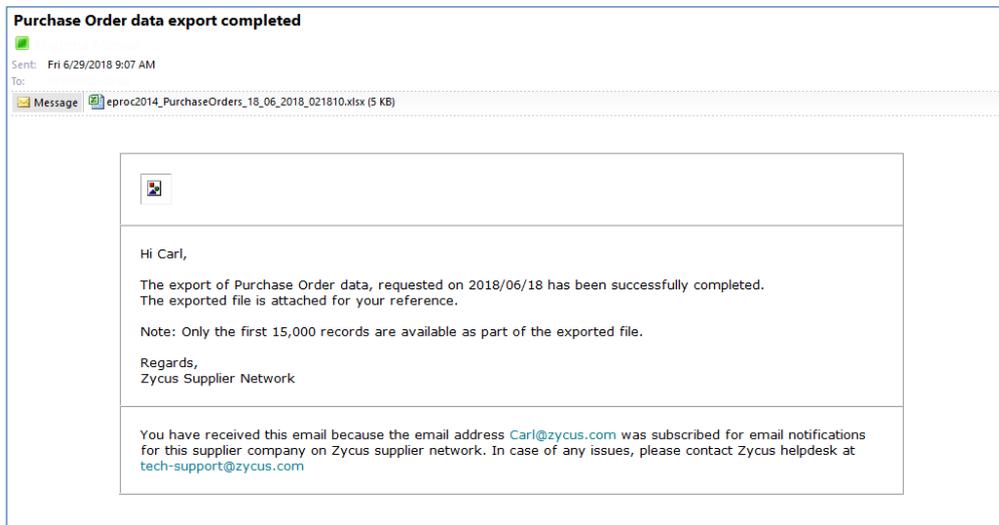
2. To export the PO details, click **Export** as highlighted in the image below:



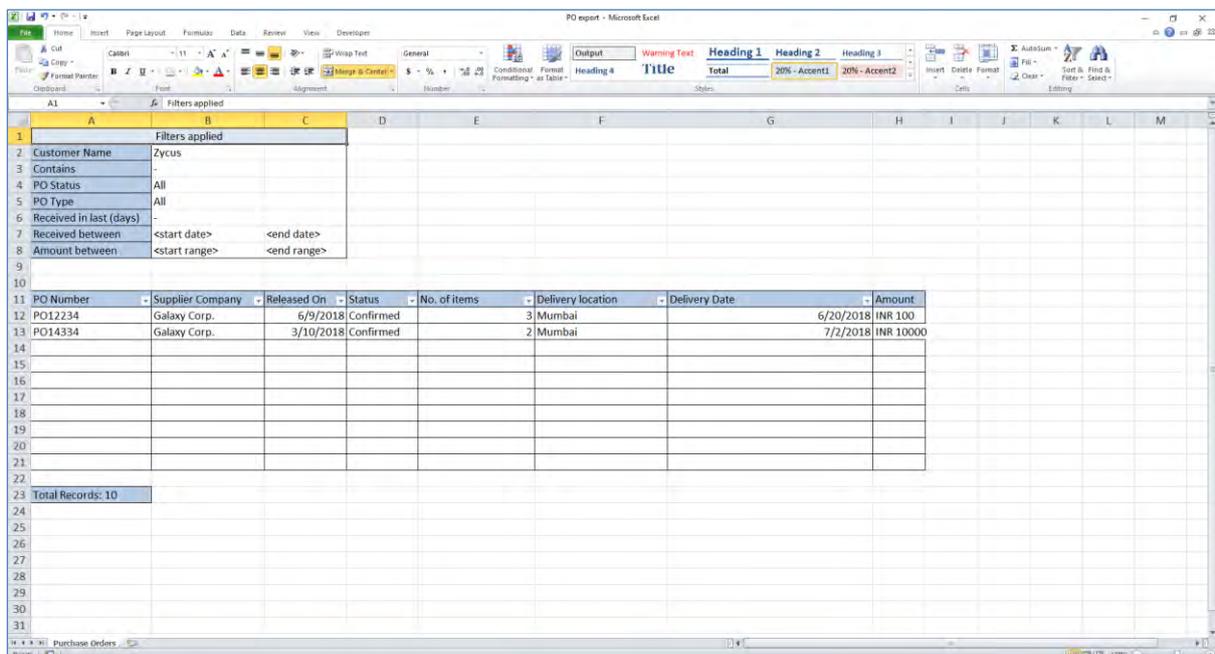
- Clicking **Export**, you will see the following popup which will notify you that data export is in progress and you will be notified through an email once the file export is complete. Click **Ok**.



- Once the file is ready, you will receive the exported file (attached) to your registered email ID as shown below:



- Open the file to view your PO details:



**Note:** The data exported will be as per the filter applied on the listing page. You will be able to view the applied filters in the exported file as well. The maximum limit on the number of records exported is 15,000. Records beyond 15,000 will not be part of the exported file.

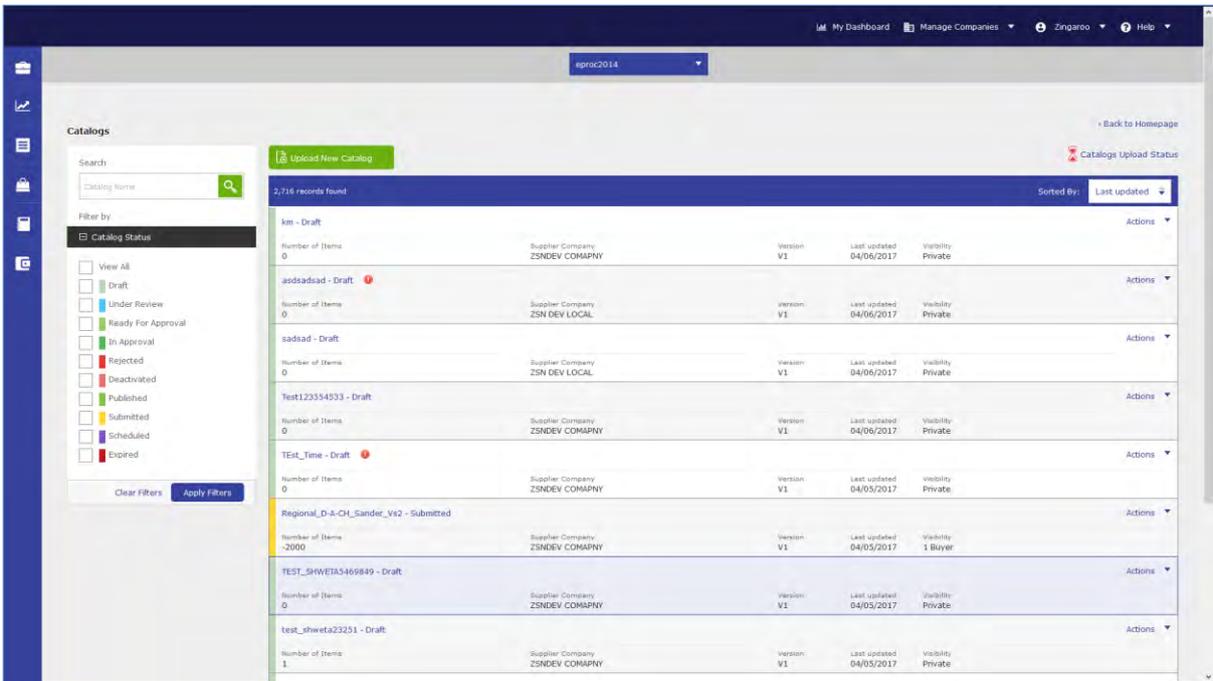
### 6.9 My Catalogs

**NOTE:** The above-mentioned menu may or may not be available based on the access provided to you by customer.  
If your company profile is put on hold by your customer, then you won't be able to create a Catalog for that customer.

The **My Catalogs** option allows the user to:

- View catalogs uploaded by you for a customer
- Create your new catalog

To view the catalogs, access the side panel and go to **My Catalogs > View Catalogs**. You will land on the following page:



**NOTE:** When a catalog is first uploaded by the customer or created by supplier, the version will be V1 by default.

The User can perform the following operations using the **View Catalogs** tab:

1. Search Catalogs (Refer **Searching Invoices**)
2. Filter Catalogs (Refer **Filtering Invoices**)
3. Sort Catalogs (Refer **Sorting Invoices**)
4. View Catalogs (Refer
- 5.
6. **Viewing** Invoices)
7. Upload New Catalog
8. Edit Existing Catalogs
9. Delete Catalogs

**Note:** For the catalogs that are being uploaded in the background and be reviewed by clicking **Catalog Upload Status** option as shown below:



## 6.9.1 How to Upload a Catalog?

Uploading a Catalog in **ZSN** consists of the following Steps:

Step 1: **Catalog Details**

Step 2: **Upload Catalog**

- a. **Online Creation**
- b. **Offline Upload (CSV, CIF 3.0, cXML, Excel, ZIP)**
  - i. **Upload File**
  - ii. **Map Columns**
  - iii. **Validate**
  - iv. **Classify**

Step 3: **Item Details**

Step 4: **Validate and Publish**

### To upload a Catalog in ZSN:

Navigate to the following location: Side Panel > **My Catalogs** > **Create New Catalog** > Required Customer Company.

### Step 1: Catalog Details

1. Enter the mandatory fields such as **Catalog Name** and **Supplier Company**.
2. Enter the **Buyer Email Id** if you wish to share your catalog with any buyer.

**NOTE:** if the **Buyer Email Id** does not belong to buyer organization, then the system will display following error message:

3. Select the **Catalog Taxonomy** as **Standard Taxonomy** or **Custom Taxonomy**.

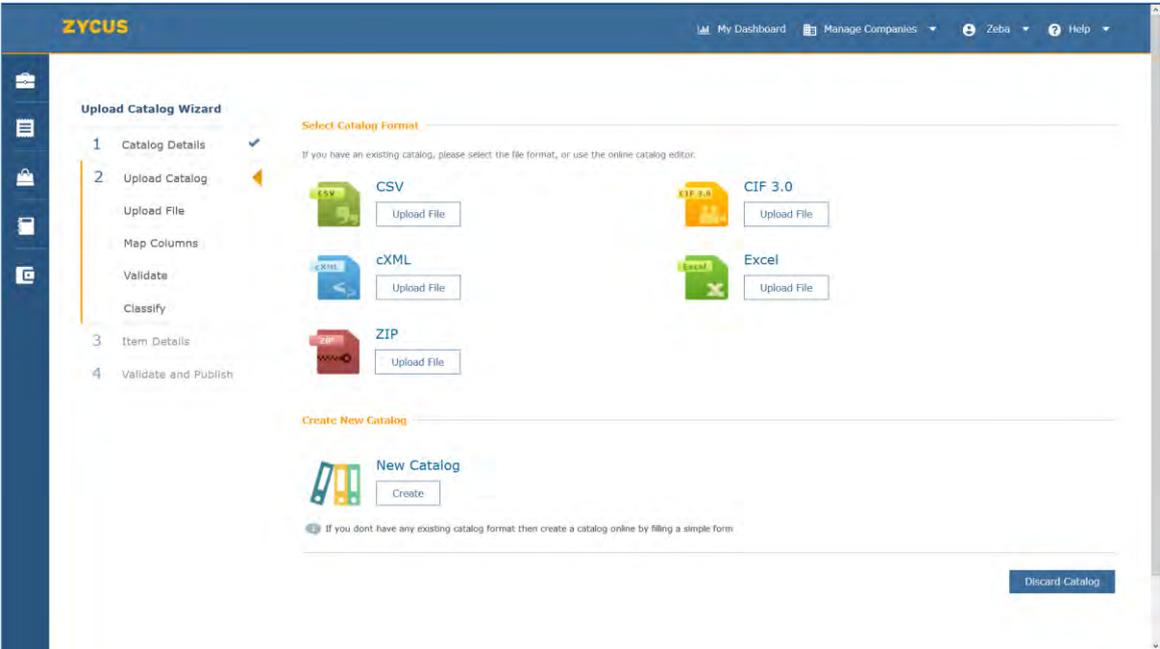
4. If you select **Custom Taxonomy** there will be no validations on category.

**NOTE:** Custom Taxonomy may or may not be supported by your buyer. Please inform your buyer in case you are uploading a taxonomy different from buyers.

5. Click **Continue**.

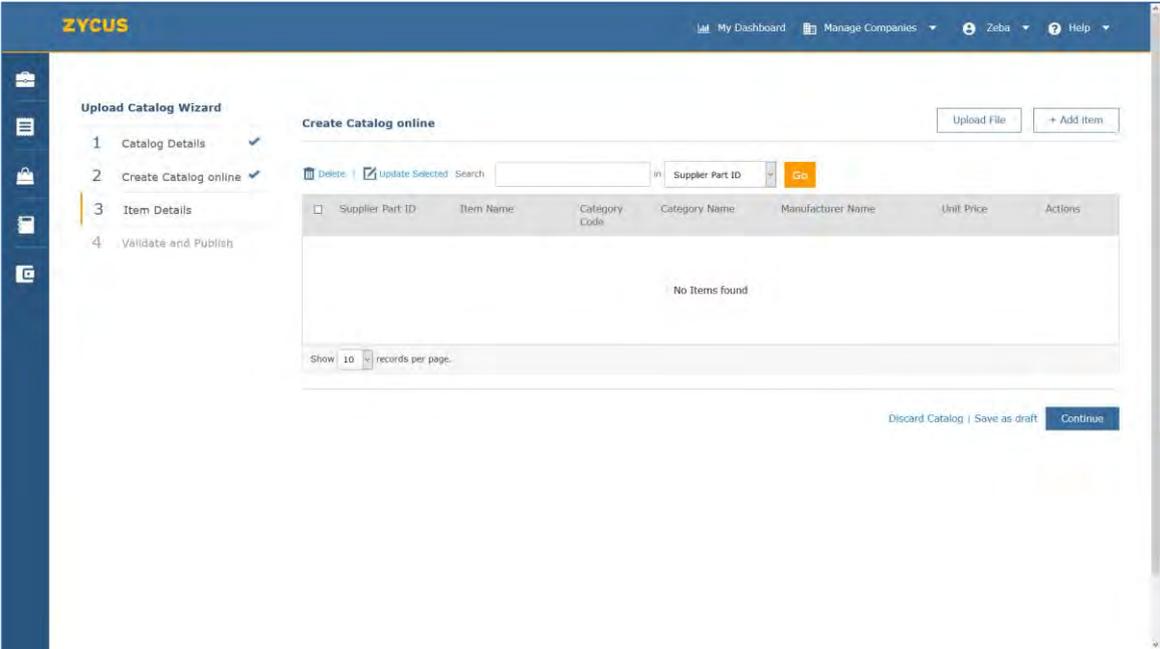
**Step 2: Upload Catalog**

Select the required Catalog format for upload **OR** click Create under **Create New Catalog**. Refer the following screenshot:



**Online Creation**

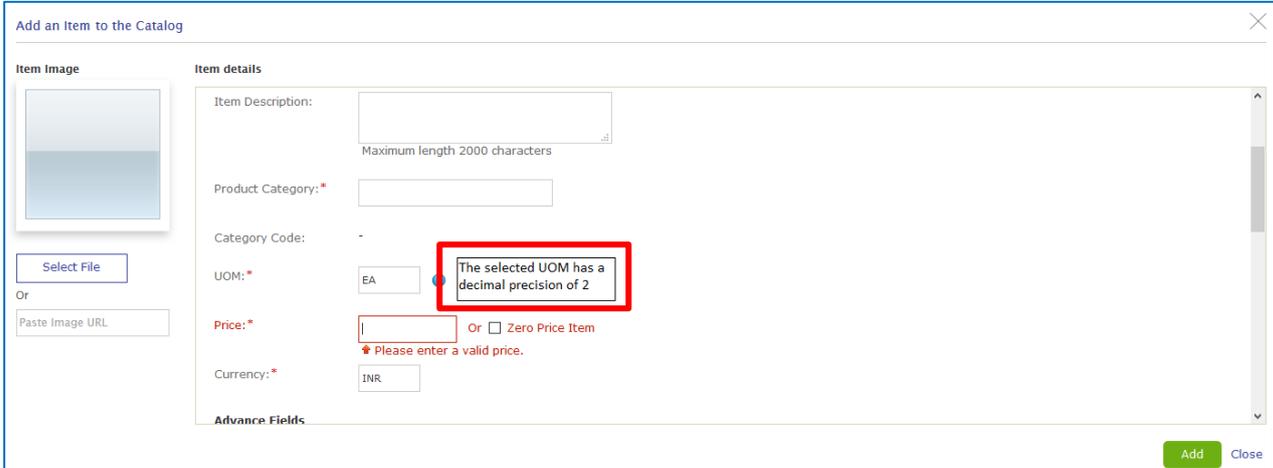
- 1. On the **Step 2** page, click on the **Create** button under **Create New Catalog**. This will redirect you to the following page:



2. Click **+ Add new item** to add items to the Catalog.



**NOTE:** ZSN prevents customers from adding UOM or Price which is not supported as per customer supported UOM and decimal precision for currency. It will show a warning as shown in the following screenshot:

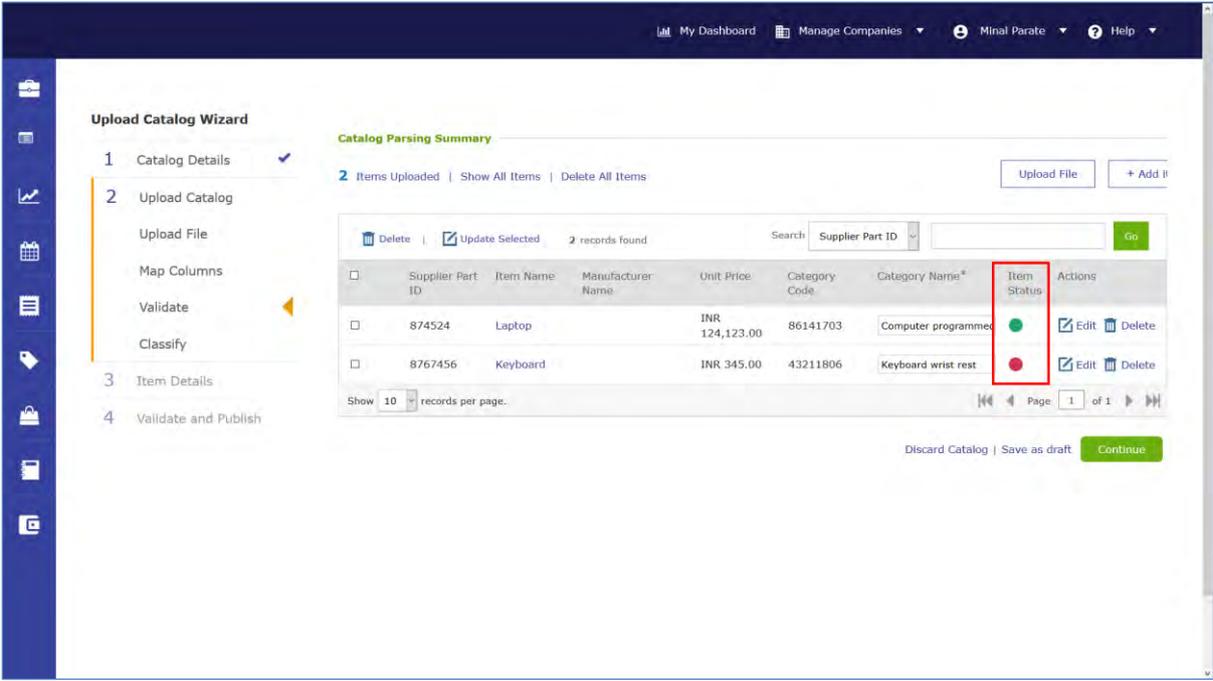


The screenshot shows a web form titled "Add an Item to the Catalog". The form is divided into two main sections: "Item Image" and "Item details".

- Item Image:** Contains a placeholder image, a "Select File" button, and a "Paste Image URL" input field.
- Item details:** Contains several input fields and a warning message:
  - Item Description:** A text area with a "Maximum length 2000 characters" note.
  - Product Category:** A dropdown menu.
  - Category Code:** A text input field.
  - UOM:** A dropdown menu with "EA" selected. A red-bordered box highlights a warning message: "The selected UOM has a decimal precision of 2".
  - Price:** A text input field with a "Zero Price Item" checkbox and a red error message: "Please enter a valid price."
  - Currency:** A dropdown menu with "INR" selected.
  - Advance Fields:** A section header for additional options.

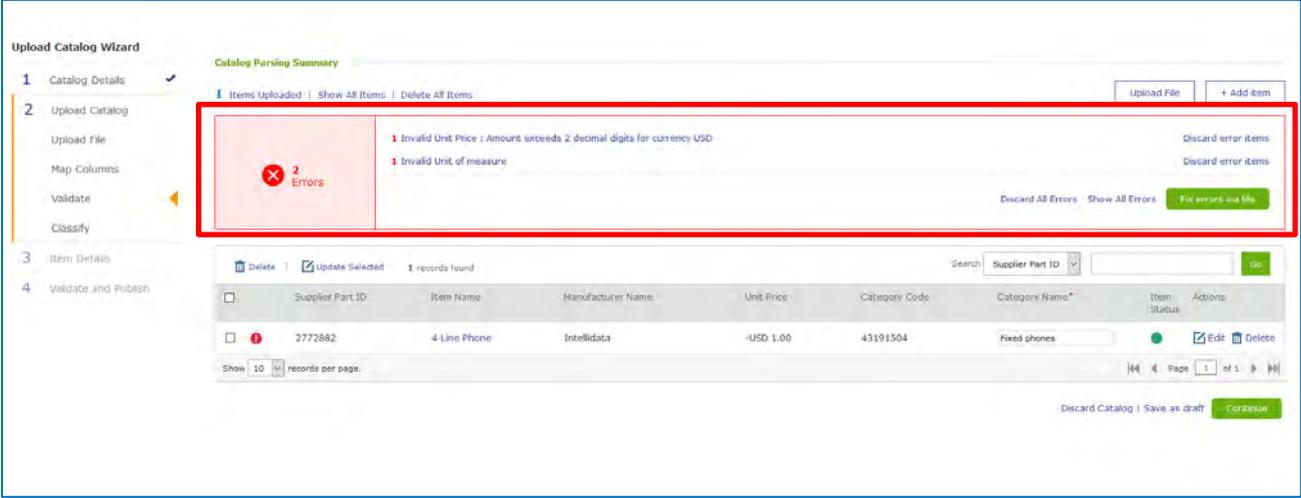
At the bottom right of the form, there are "Add" and "Close" buttons.

3. Enter all the required information about the item to be added in the Catalog such as:
  - Supplier Part ID
  - Short Description
  - Product Category
  - UOM
  - Price
  - Currency
4. You can also choose to **De-activate** an item if required.
5. Select the Item Image by clicking **Select File** OR enter the URL of the image.
6. Click **Add** to add the item with the entered details in the Catalog. Similarly, add/edit/delete all items in the Catalog as per requirement.
7. Once the items are added, you can review them as shown below:

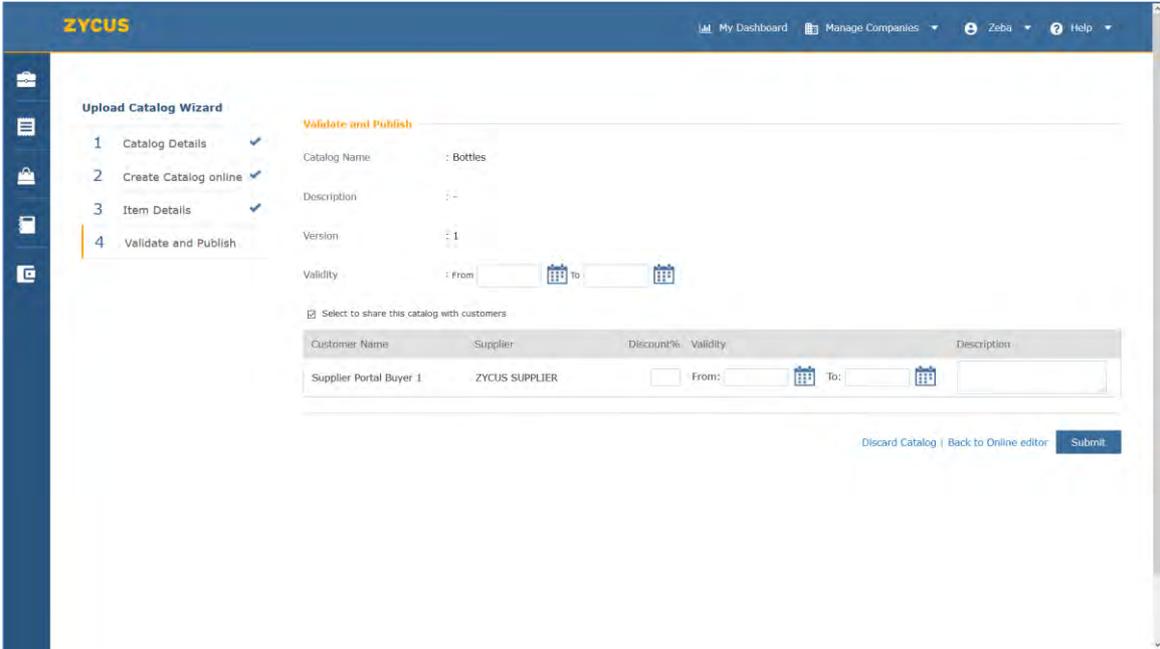


**Note:** Highlighted section shows the status of items of whether they are active or inactive.

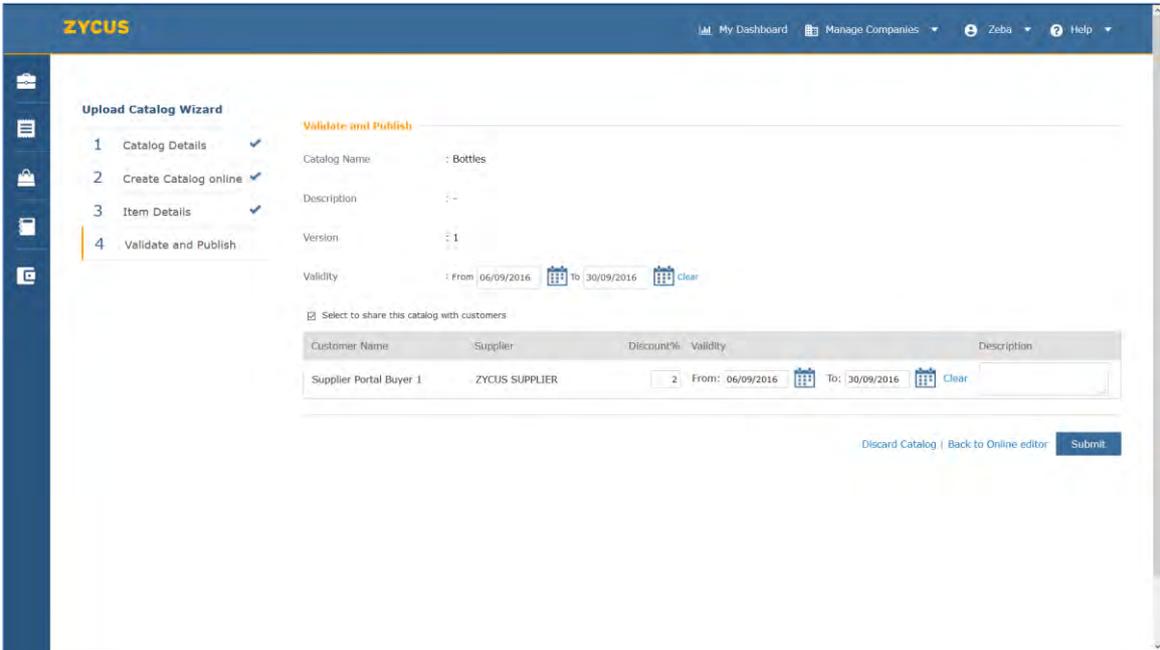
**Note:** If Decimal Precision is not followed for items uploaded in the catalog, ZSN will display an error as shown below:



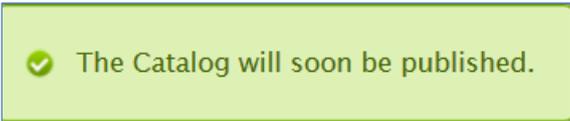
8. Click **Continue** to proceed to **Step 4: Validate & Publish**. Following page will be displayed:



- 9. Enter the **Validity (From-To)** of your catalog using the date picker.
- 10. You can also share this catalog with your customers. Check the box against **Select to share this catalog with customers**. On checking the box, a table will appear.



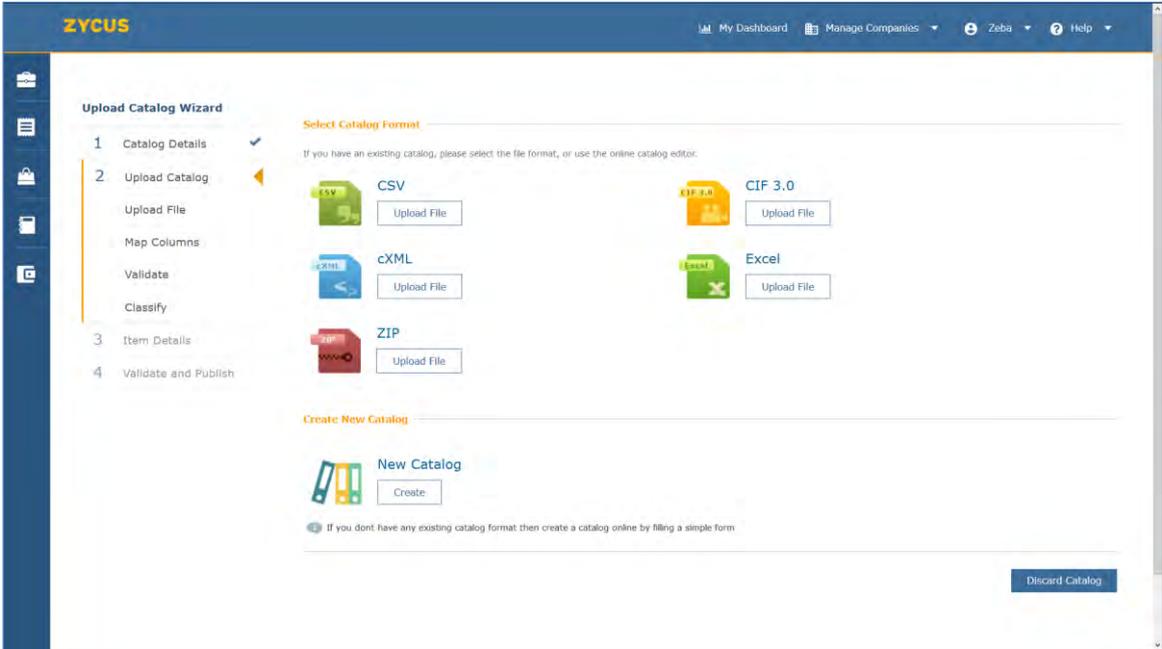
- 11. For the selected customer, **Customer Name** will be auto-populated. You can enter the **Discount** you want to offer to the company. You can also mention the **Validity** of the catalog for the customer.
- 12. Click **Submit**. You will get following popup:



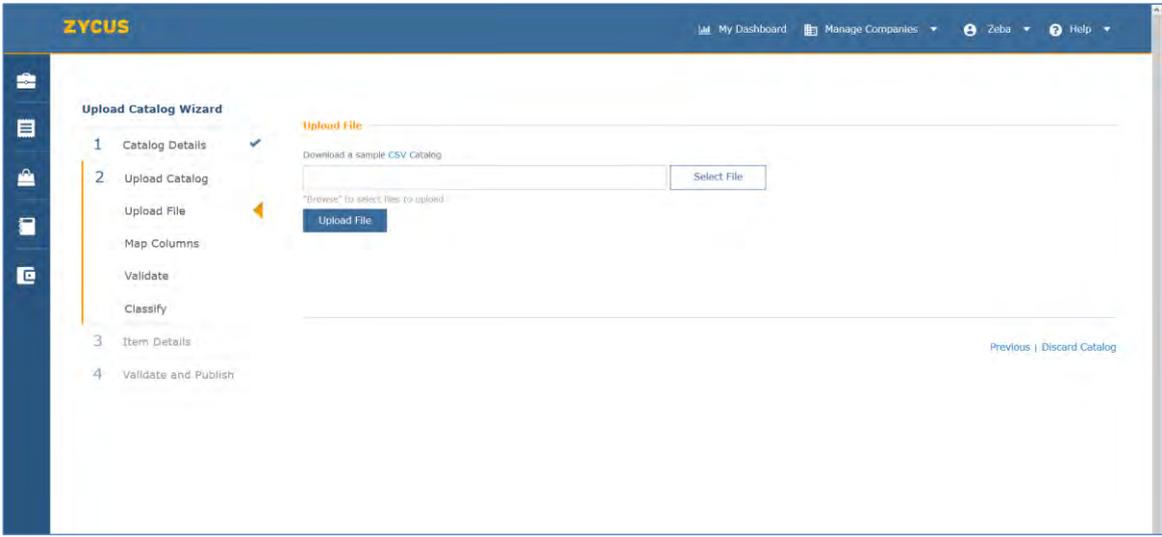
13. Your catalog will be displayed in catalog listing page.

**Offline Creation**

1. On the **Step 2** page, select the required **File Upload Format**.



2. Download the sample Catalog file for the selected format using the below highlighted link.



3. Download, edit & save the downloaded sample catalog file as per requirements.

4. Click **Select File** and browse and select the edited and saved catalog file.

**NOTE:** You can download the sample template for **ZIP** file on your system for reference.

**NOTE:** Validations will be in place when supplier enters any currency, UOM, location or address that are no longer supported by the buyer.

**NOTE:** Catalogs uploaded using all bulk upload methods will be validated for Decimal Precision against UOM and Item Price as per the currency selected for that item.

**NOTE:** In case of Zip file upload, your zip file should consist of 2 elements: spread sheet consisting of the line items and a folder consisting images for each line item mentioned in spread sheet.

5. Click **Upload File** button to upload selected catalog file & proceed to the **Map Columns** sub step.

The screenshot displays the 'Map Columns' step of the 'Upload Catalog Wizard'. On the left, a sidebar shows the wizard steps: 1. Catalog Details (checked), 2. Upload Catalog (selected), 3. Item Details, and 4. Validate and Publish. Under 'Upload Catalog', the sub-steps are: Upload File, Map Columns (active), Validate, Classify, Item Details, and Validate and Publish. The main area is titled 'Map Columns' and contains two tables. The 'Columns in Uploaded File' table lists fields from the uploaded catalog, and the 'Standard Catalog Columns' table lists fields from the system. A legend at the bottom indicates that yellow boxes represent 'Mandatory Fields' and blue boxes represent 'Optional Fields'.

Columns in Uploaded File	Map in
Supplier ID	Supplier ID
Supplier Part ID*	Supplier Part ID
Short Name*	Short Name
Item Description	Item Description
Currency*	Currency
Unit Price*	Unit Price
Unit of Measure*	Unit of Measure
ERP Part No	ERP Part No
SPSC Code	
Manufacturer Name	Manufacturer Name
Manufacturer Part ID	Manufacturer Part Id
Market Price	Market Price

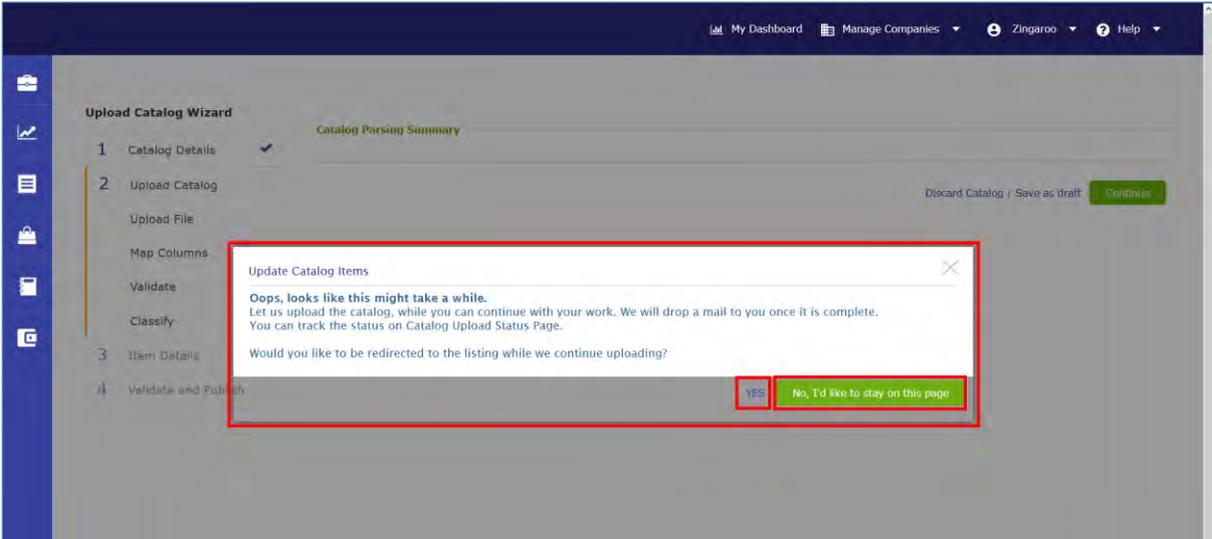
Standard Catalog Columns	
SPSC/Category Code	Delivery Lead Time (days)
	Supplier Part Auxiliary ID
	Specification Name
	Specification Data
	Is green

Legend: Mandatory Fields Optional Fields

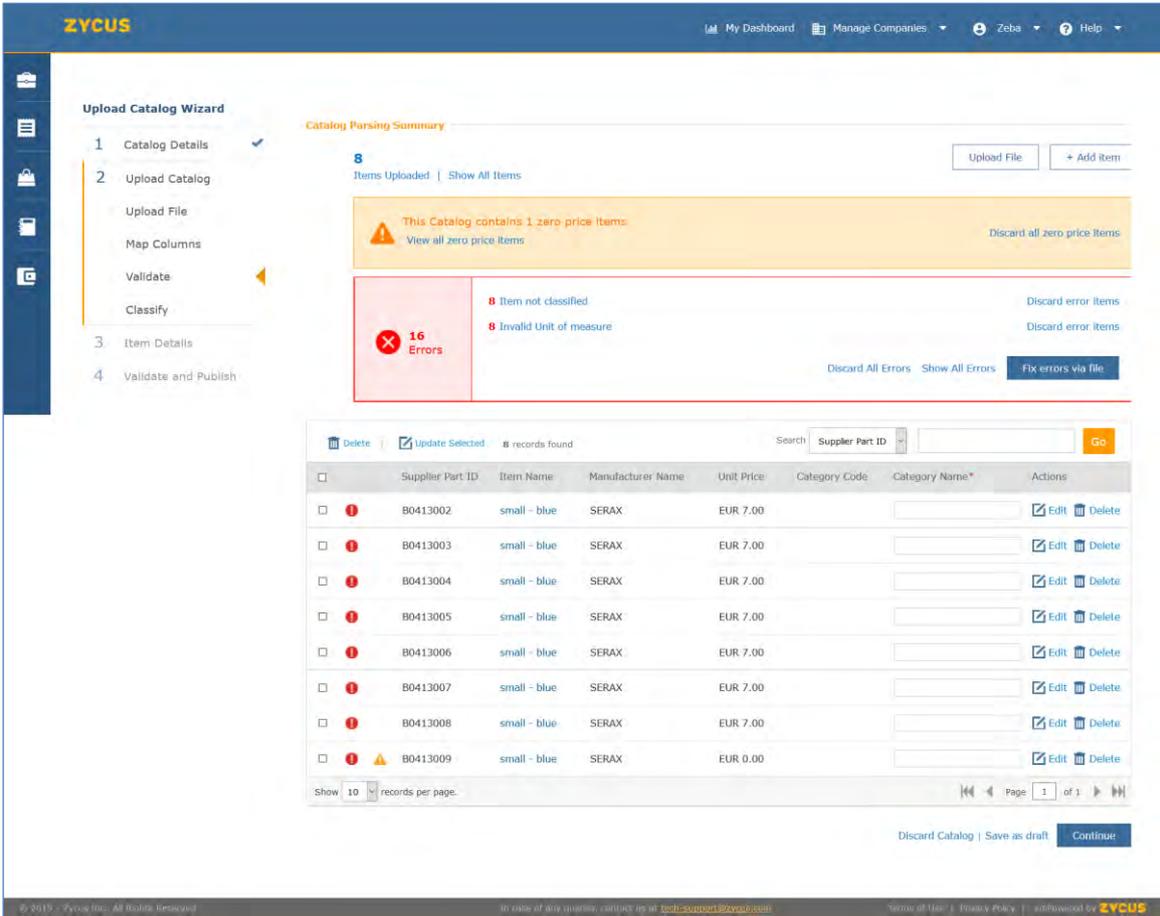
6. Drag and Drop the Standard Catalog Columns to map the Columns of the uploaded catalog file with the fields in **ZSN**.

7. Click **Continue** to conclude the **Map Columns** sub step and proceed to the **Validate** sub step.

8. If the catalog is going to take a while to upload, then you will see the following message:



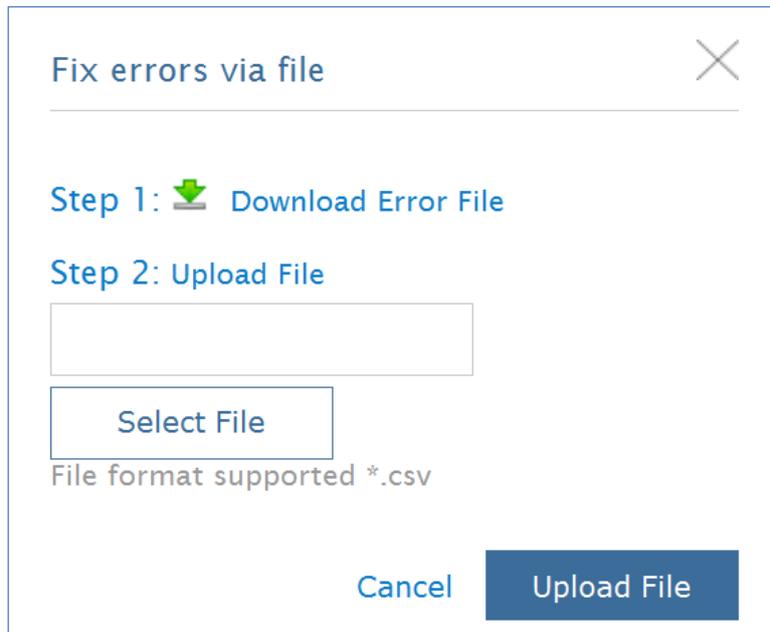
9. This message will notify that you have an option of letting the catalog upload in the background or you can stage on this same page until the catalog is uploaded.
  - To allow the upload in the background, click **Yes**
  - To wait for the catalog to upload, click **No, I'd like to stay on this page**
10. The uploaded catalog file is processed and you will be able to view the items that have been successfully uploaded, have errors and warnings items.



11. Warnings are denoted by  icon.
12. Errors are denoted by  icon.
13. If you click **Discard error items** or **Discard All Errors**, then the Catalog wizard will permanently delete the line items containing errors.

### Fixing Errors via File

14. Click **Fix errors via file** to correct multiple errors. Following popup will be displayed:



Fix errors via file

Step 1:  Download Error File

Step 2: Upload File

Select File

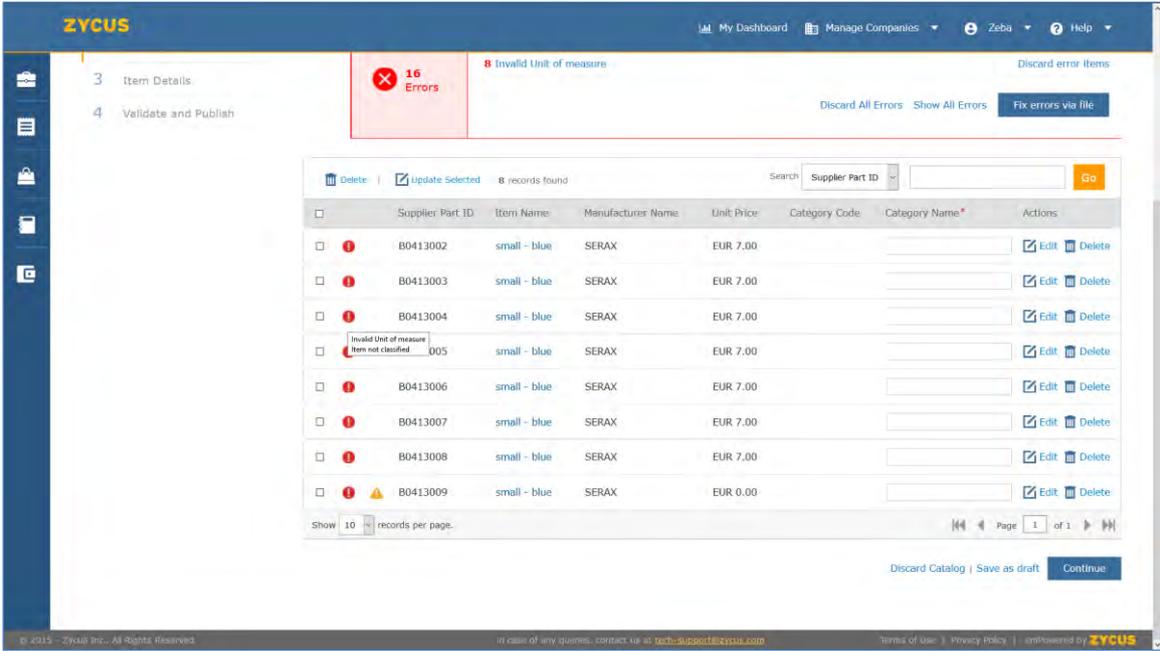
File format supported \*.csv

Cancel Upload File

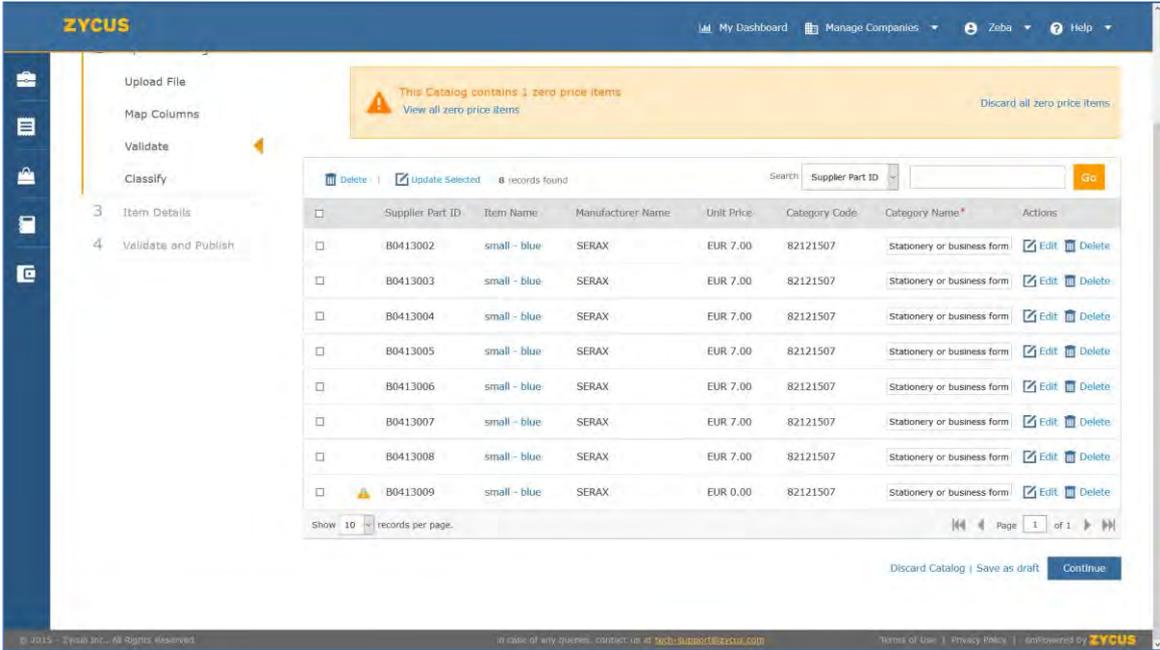
15. Fixing errors via file is a two-step process:
  - Download the error file (this file will only contain the error line items that needs to be changed). Make the necessary changes.
  - Upload the corrected file.

### Fixing Errors on ZSN

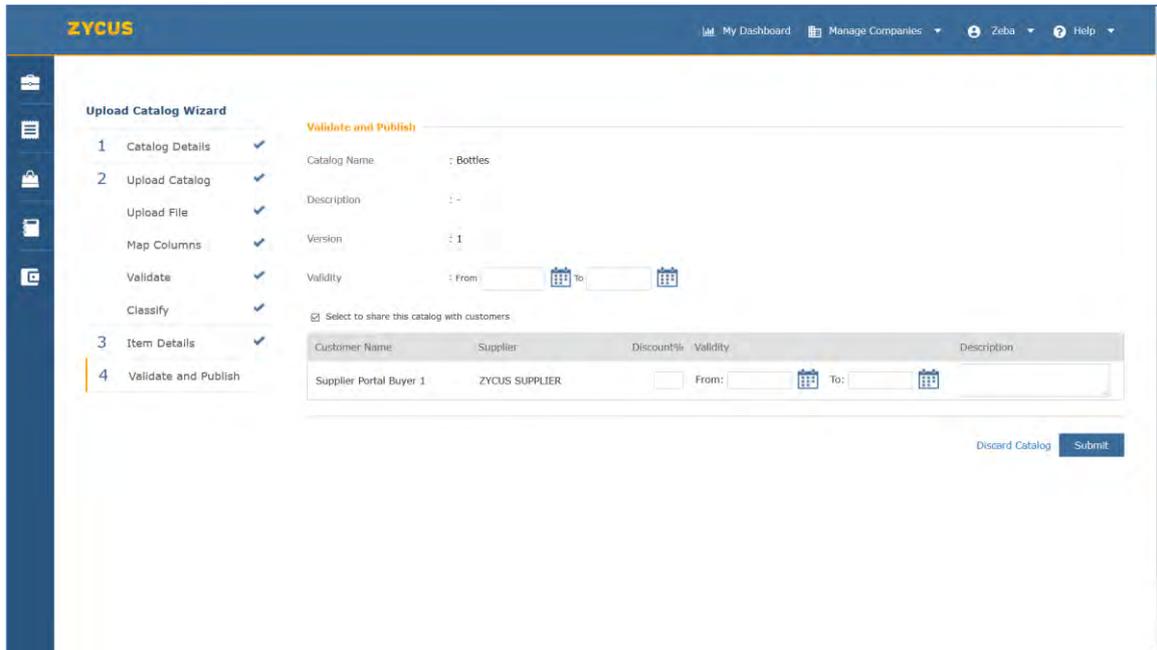
1. If the errors are less in number, you can fix the errors on the tool as shown below:



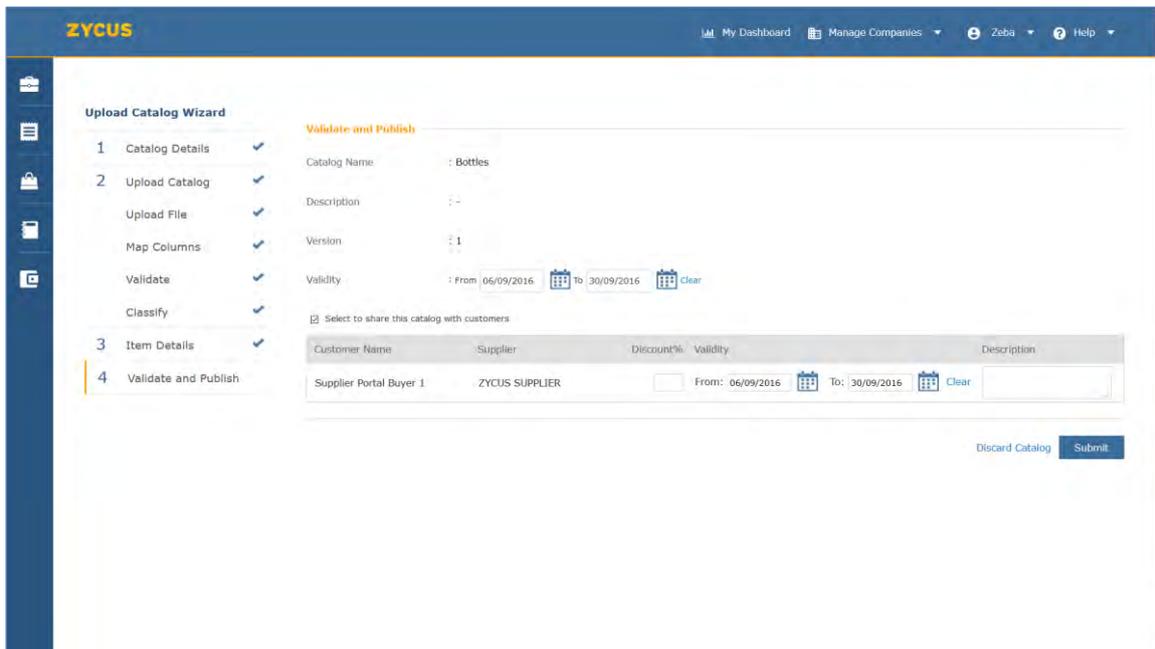
- 2. Hover on error icon to view the error.
- 3. For example, if the item is not classified, you will have to manually classify the items.
- 4. When the errors will be corrected, you will notice that error icon will disappear.



- 5. Click **Continue** to conclude the **Validate** sub step and proceed to the **Classify** sub step.



6. Click **Continue** to conclude the **Classify** sub step and proceed to **Step 4: Validate & Publish**.



**Step 3: Item Details** is not applicable in case of Offline Catalog File Upload.

**Step 3: Item Details**

Refer to the

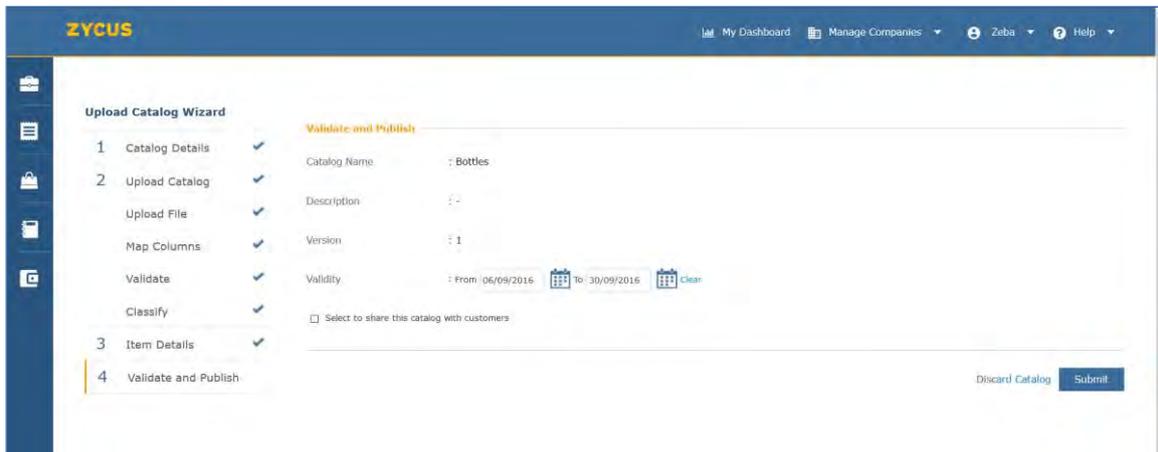
Online **Creation** section for steps to be performed in Step 3.



**Step 3: Item Details** is not applicable in case of Offline Catalog File Upload.

**Step 4: Validate & Publish**

- Using the  icon, select the time period for which the Catalog is valid.



- Check the **Select to share this catalog with customers** option to select customers with whom the Catalog is to be shared.



If no Customers are selected to share the Catalog with, the Catalog remains **Private** and is not visible to any Customers.

- Enter the **Discount %**, **Description**, and select the **Validity** of the Catalog for each Customer.

4. Click **Submit** to proceed and share the Catalog with the selected Customers.

## 6.9.2 How to Edit a Catalog?

As a supplier, you can edit a published, rejected, deactivated or expired catalog.

### To edit a Catalog:

1. Navigate to the following location: Side Panel > **My Catalogs** > **View Catalogs** > Required Customer Company.
2. Look for the required catalog using the Search, Filter or Sort options which has following status:
  - Published
  - Deactivated
  - Rejected
  - Expired
3. For the required Catalog, click on the **Edit** icon corresponding to it.
4. You will land on the following page:

**Upload Catalog Wizard**

1 Catalog Details

2 Upload Catalog

3 Item Details

4 Validate and Publish

**Update Catalog**

Catalog Name\* : catalog\_sandeep  
Maximum length 80 characters

Customer : ZSPDEV1

Buyer Email Id :

Supplier Company\* : ZSN DEV CO 2

Contact : QC

Contact Email Id : suresh@zycus.com

Catalog Type : Product Catalog

Catalog Taxonomy :  System Standard  Custom Taxonomy

Description :   
Maximum length 2000 characters

Discard Catalog

**Note:** You can change the Buyer Email ID, if required from this page.

- Once you revisit the basic details for a catalog, you can go ahead with the next step of updating the line items.
- Make the required changes in the Catalog and **Save** the catalog by performing the step mentioned in [Online Creation](#) for Online Upload and [Offline Creation](#) for Offline Upload.

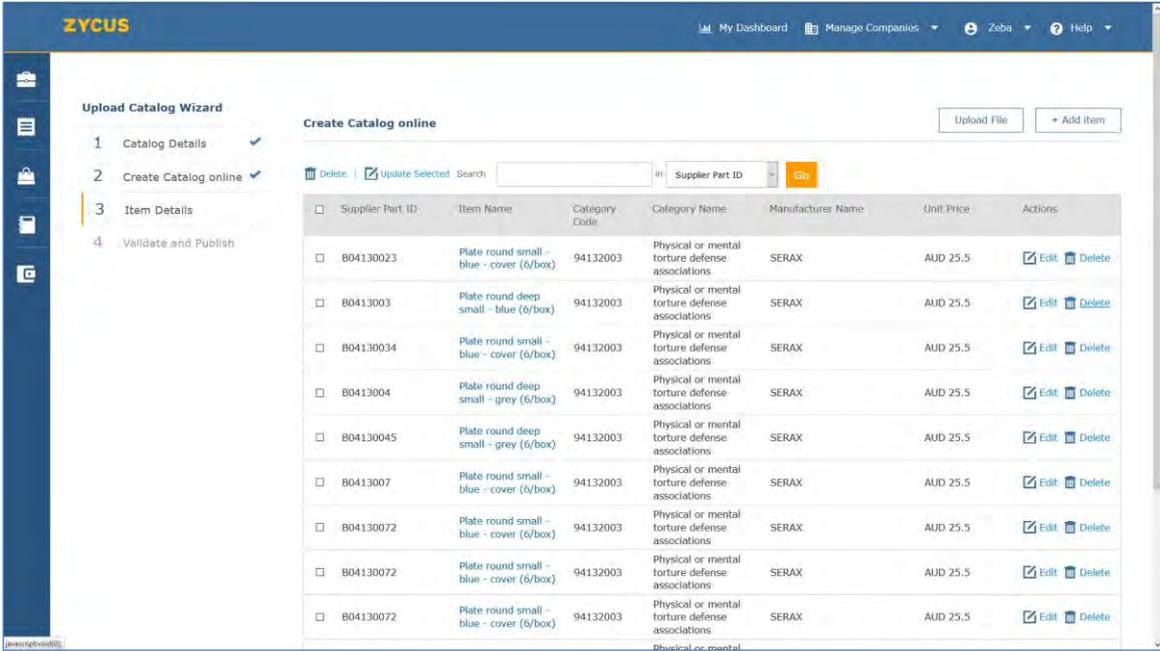


*Published Catalogs cannot be edited unless deactivated first.*

### 1. *How to Add/Upload New Items to the Catalog?*

You can edit or add new items to your existing catalogs to update the catalog with latest items.

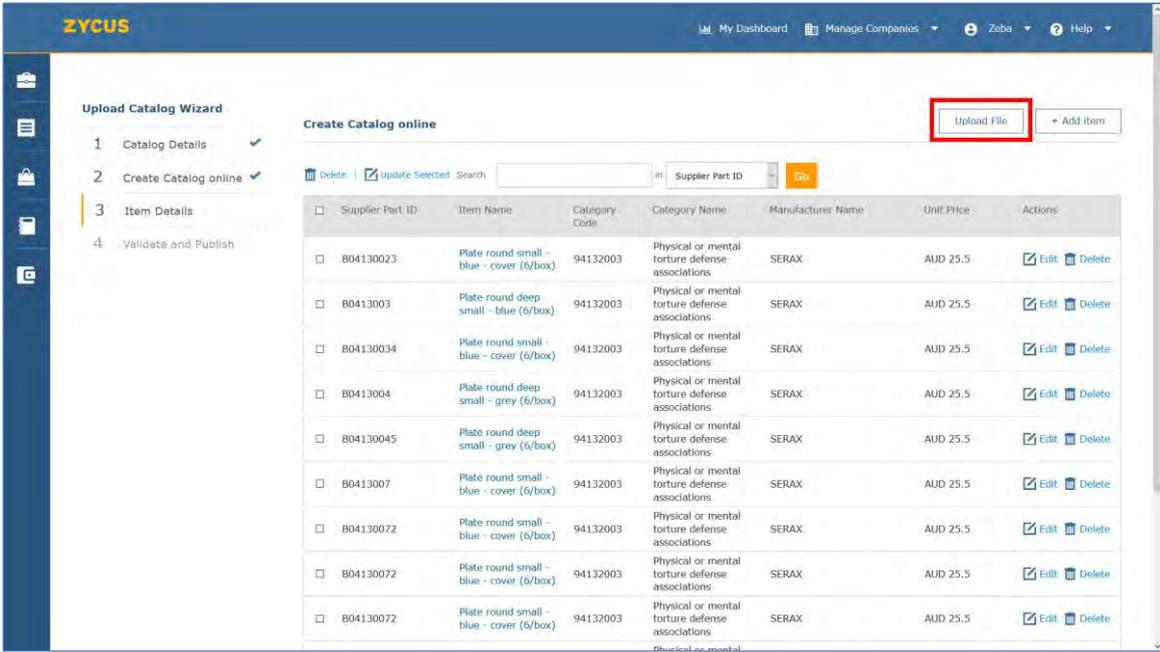
- For a given catalog, from the Catalog listing page (**Side Panel > My Catalogs > View Catalogs > Customer Name**), go to **Actions** drop-down menu and click **Edit**. You will be navigated to following page.



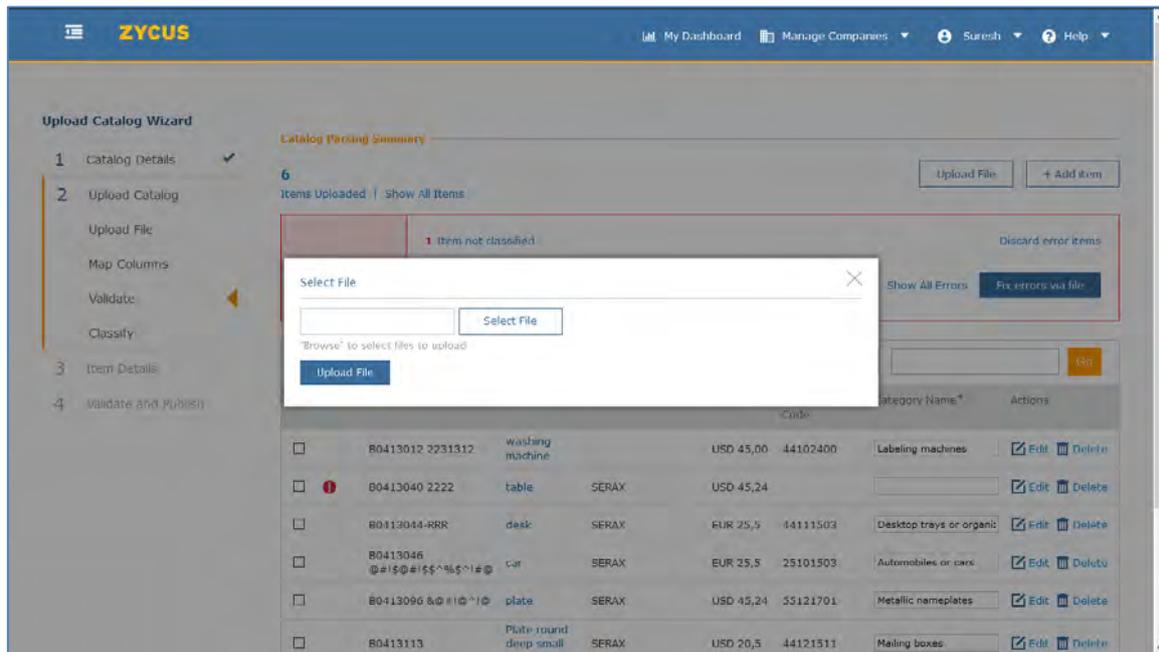
You can upload more items via file or you can add more items on the ZSN tool itself.

**To add more items via file:**

- a. click **Upload File** as shown below:

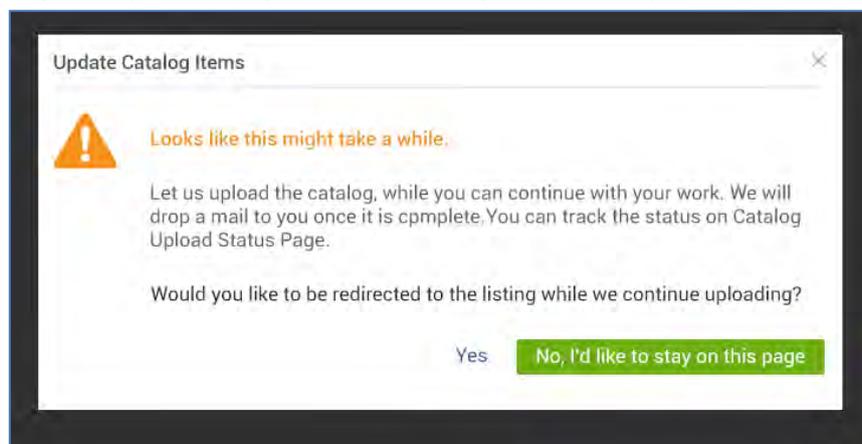


- b. Click **Select File** to upload a file form your local system to upload.



**Note:** If you upload a same file twice, then ZSN tool will accept it as new items but will display the respective duplicity.

- c. When you upload the file, in case the parsing mapping is needed, the mapping page will also open in a pop up on the same page.
- d. Click **Done** when you finish mapping the columns.
- e. Once the user uploads the catalog and maps the columns, they will see a popup as shown below, where they will have the option to continue with other work while the catalog is uploading or stay on the page until the catalog is updated/uploaded.

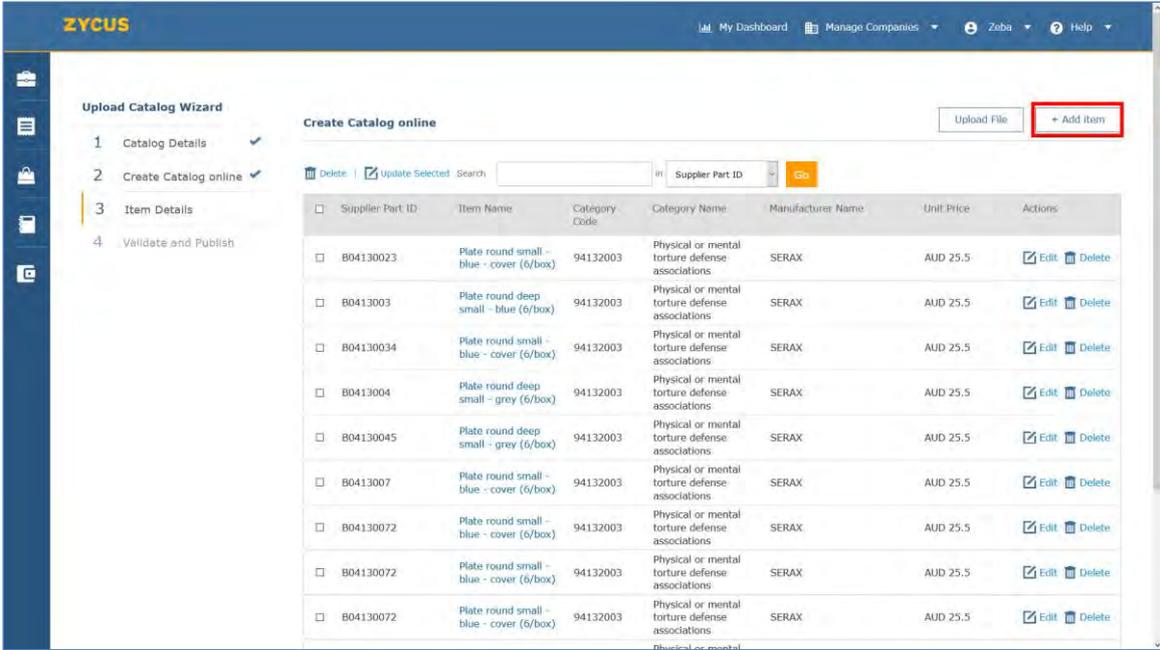


- f. If the user selects **Yes**, they will be navigated to the catalog listing page where they would be able to upload/update other catalogs, else they can continue with any other work on ZSN and also choose to logout.

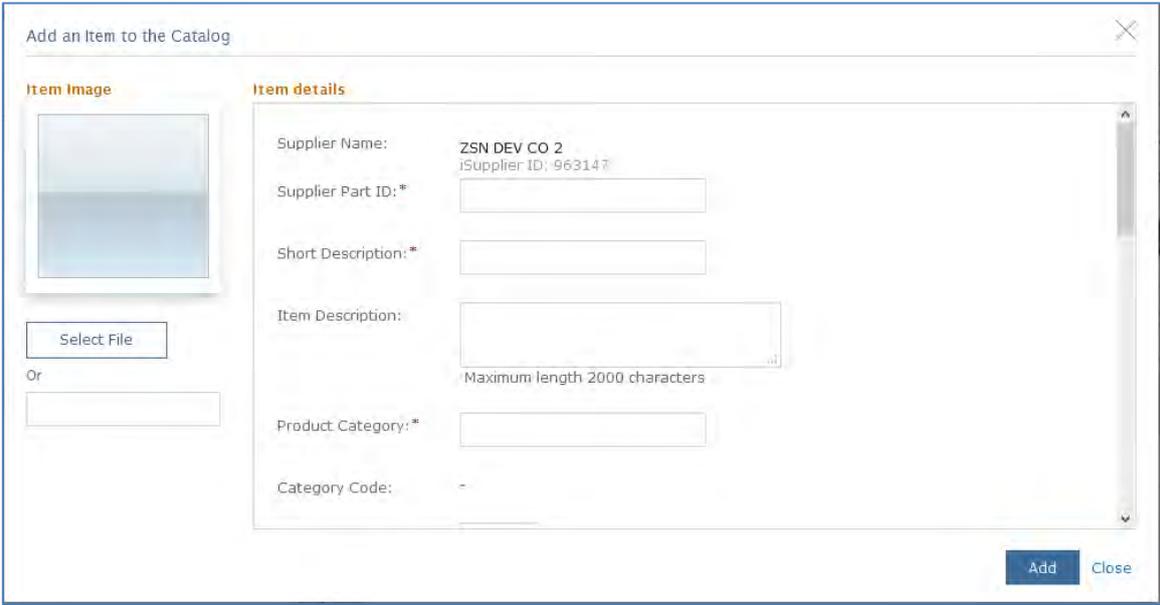
- g. Once the catalog upload is complete, an email will be sent to the registered email address of the user who was uploading the catalog.

**To add Items on the ZSN tool:**

- a. Click **Add Item** as shown below:

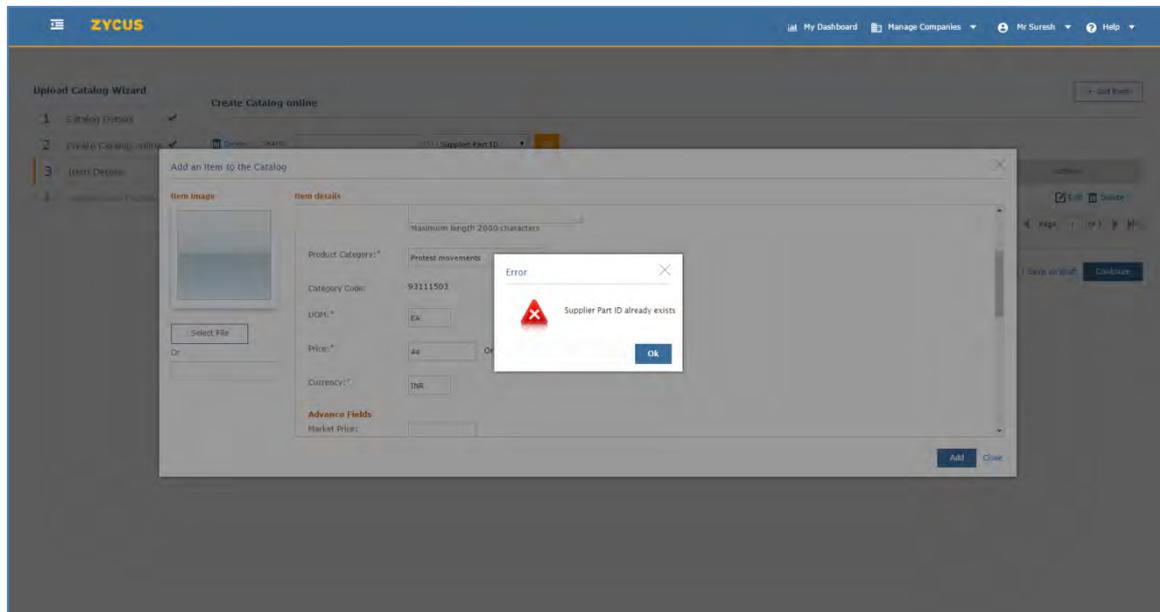


- b. Following popup will be displayed:



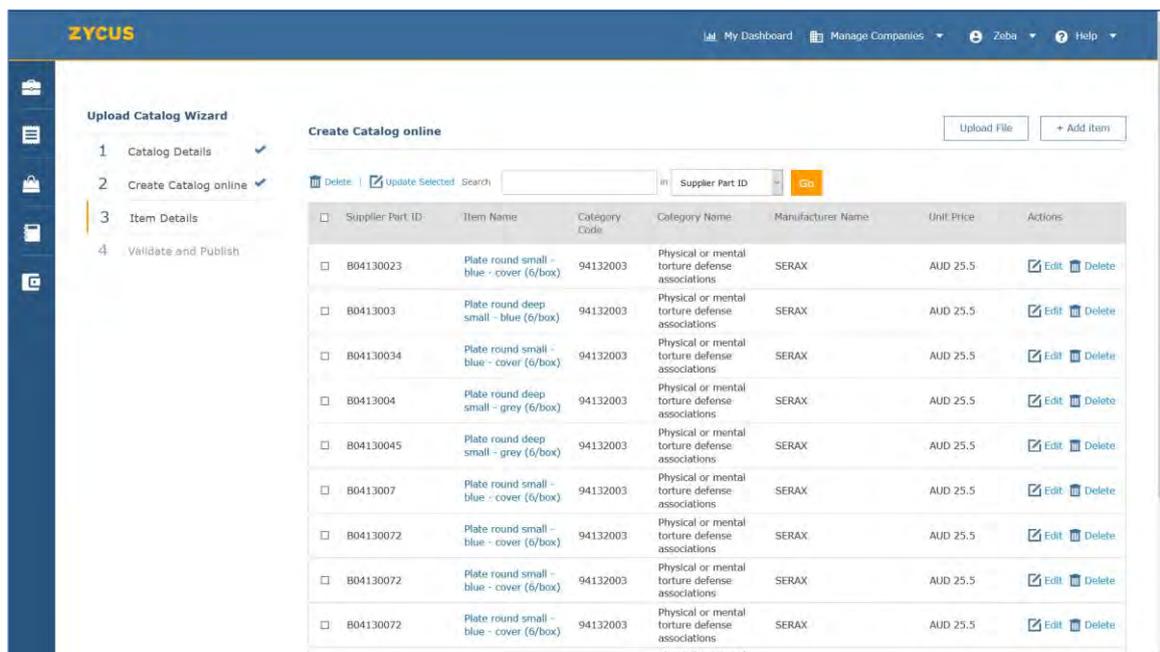
c. Enter the item details as requested. (\*) marked are mandatory fields.

**NOTE:** Ensure that the Supplier Part ID is unique. If the Supplier Part ID is already existing, then you will be notified with a popup as shown below:

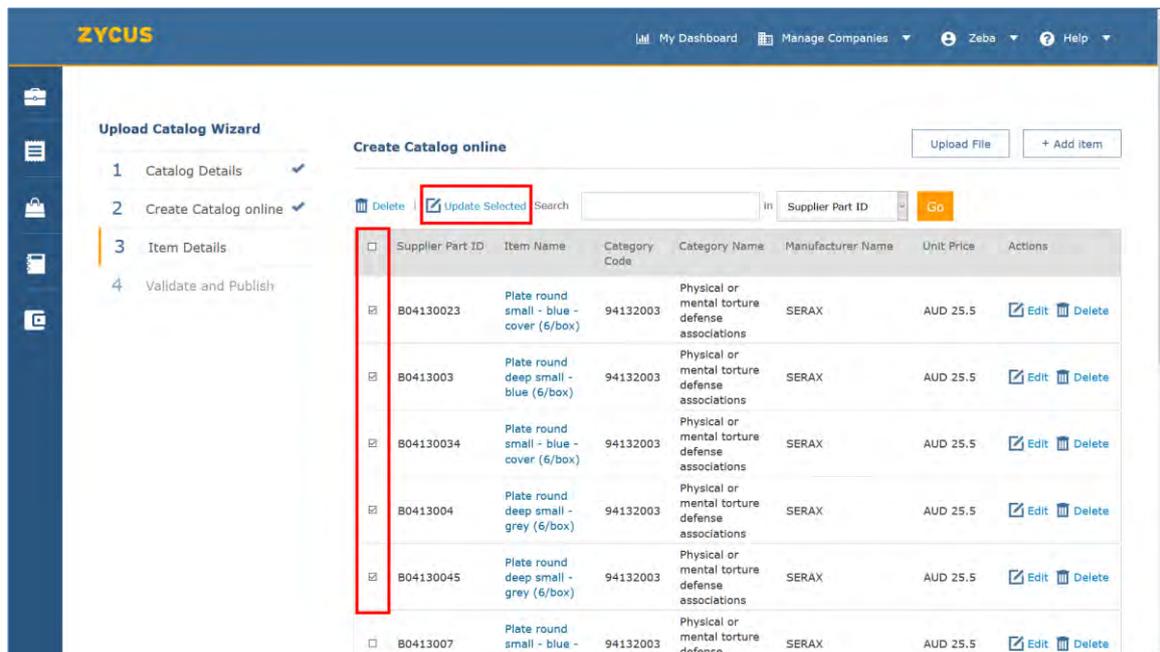


## 2. How to Update Multiple Line Items?

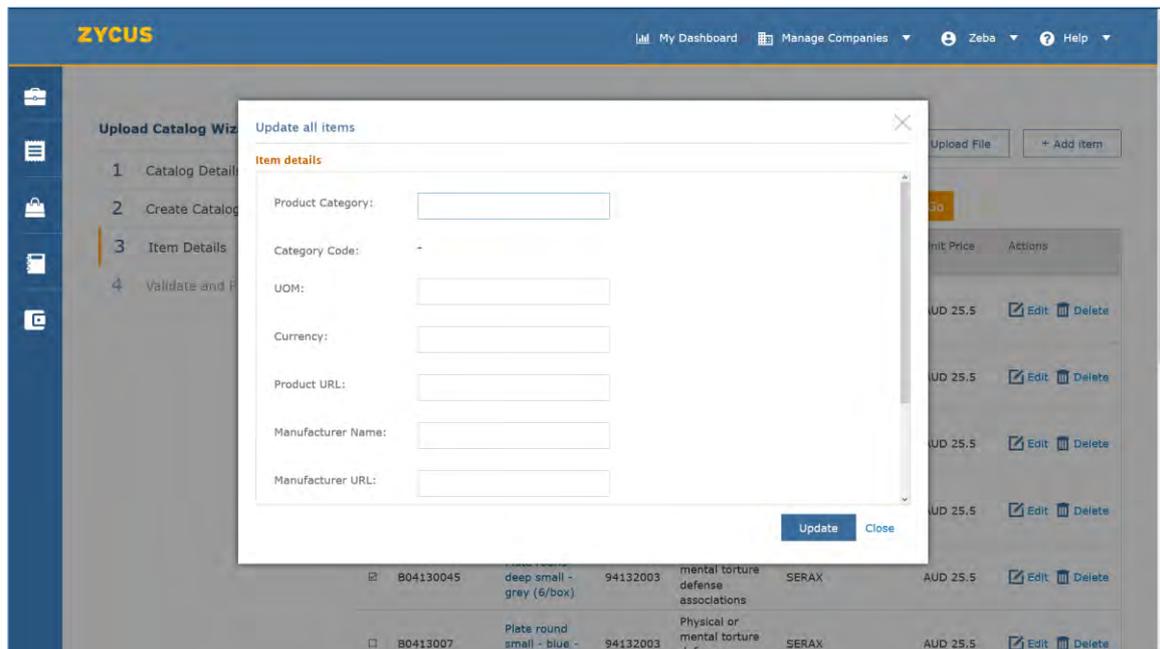
1. For a given catalog, from the Catalog listing page (**Side Panel > My Catalogs > View Catalogs > Customer Name**), go to **Actions** drop-down menu and click **Edit**. You will be navigated to **Catalog Parsing Summary** section.



2. Select multiple line items by checking the box against each line item and click **Update Selected**.



3. On selecting Update Selected, following popup will be displayed:



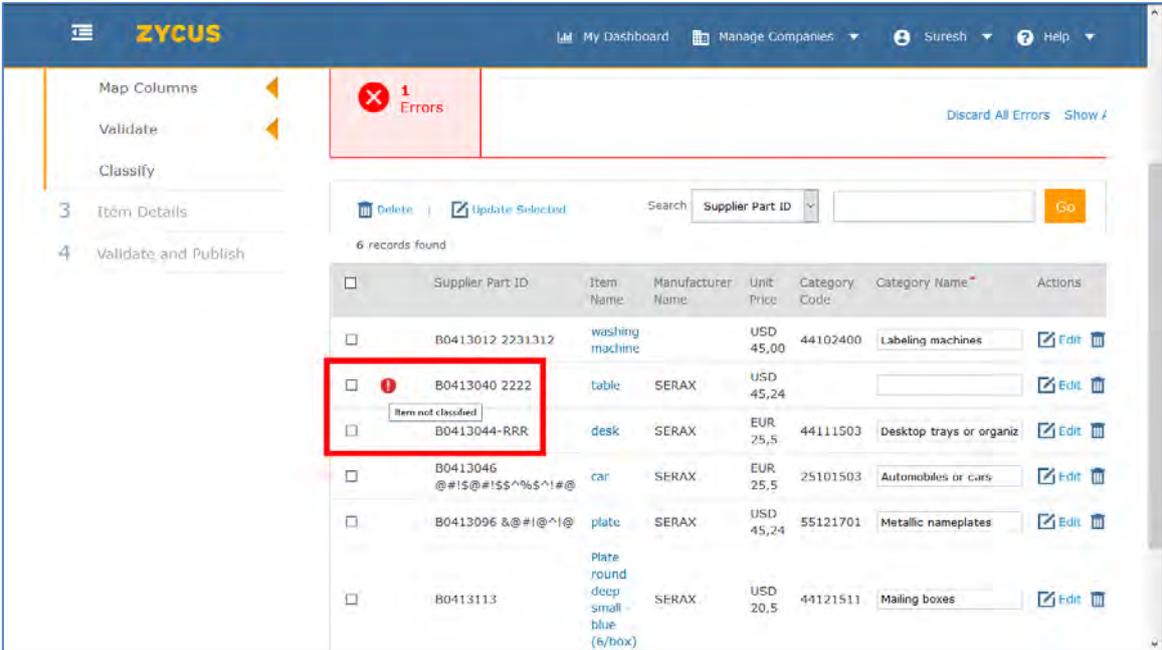
4. You will be able to update the standard item details such as **Product Category, Category Code, UOM, Currency, Product URL, Manufacturer Name, URL, Delivery Lead Time (days), Is green?, and De-activate Items?** Information.

**Note:** If there are any items already added in the catalog, you will not be able to modify the taxonomy of the catalog. However, you can update all other details.

He will not be able to update the Supplier Company and customer company for any of the catalogs.

**3. How to Update Line Items Individually?**

- 1. For a line item consisting errors, you can edit/update that line item on the ZSN tool itself. The items with error will be marked with icon.
- 2. Hover on the icon to view the error.

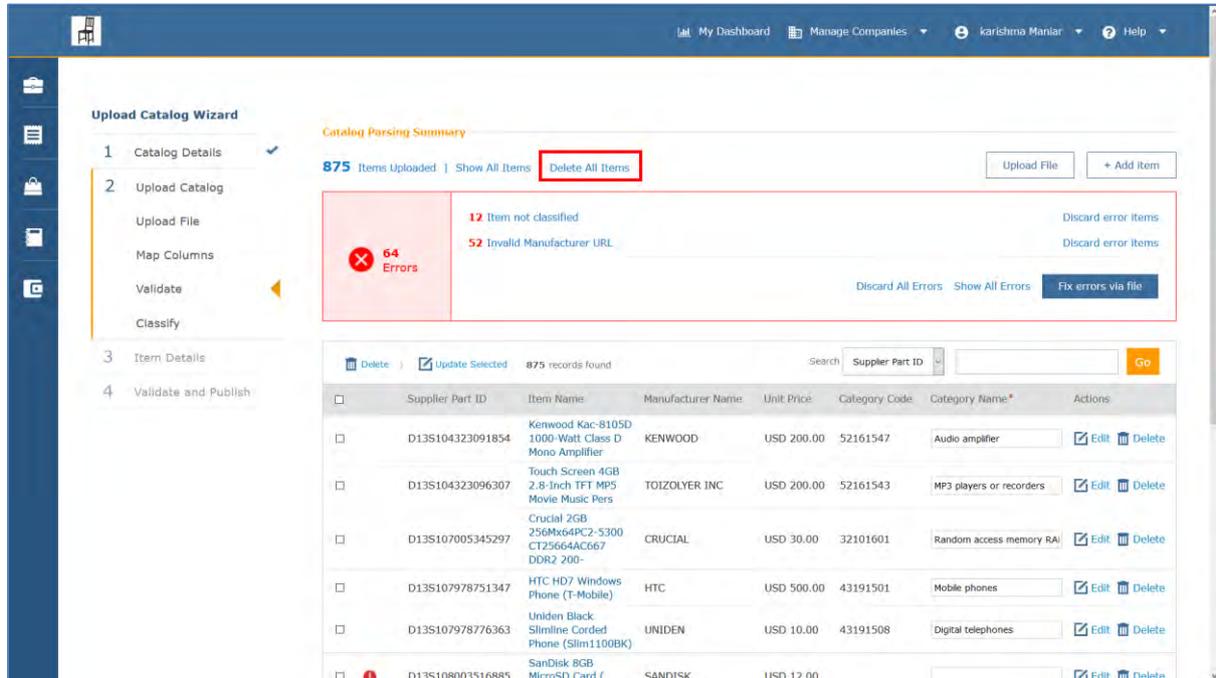


- 3. Add the missing information to update the line item. Click **Continue** to process the catalog forward.

**Note:** If there are any items already added in the catalog, you will not be able to modify the taxonomy of the catalog. However, you can update all other details.

#### 4. How to Delete all the Line Items in an Catalog?

1. To delete all the items in an catalog, on the **Catalog Parsing Summary** page, click **Delete All Items** (*highlighted*).



2. This will select and delete all the items on all the pages of the catalog.

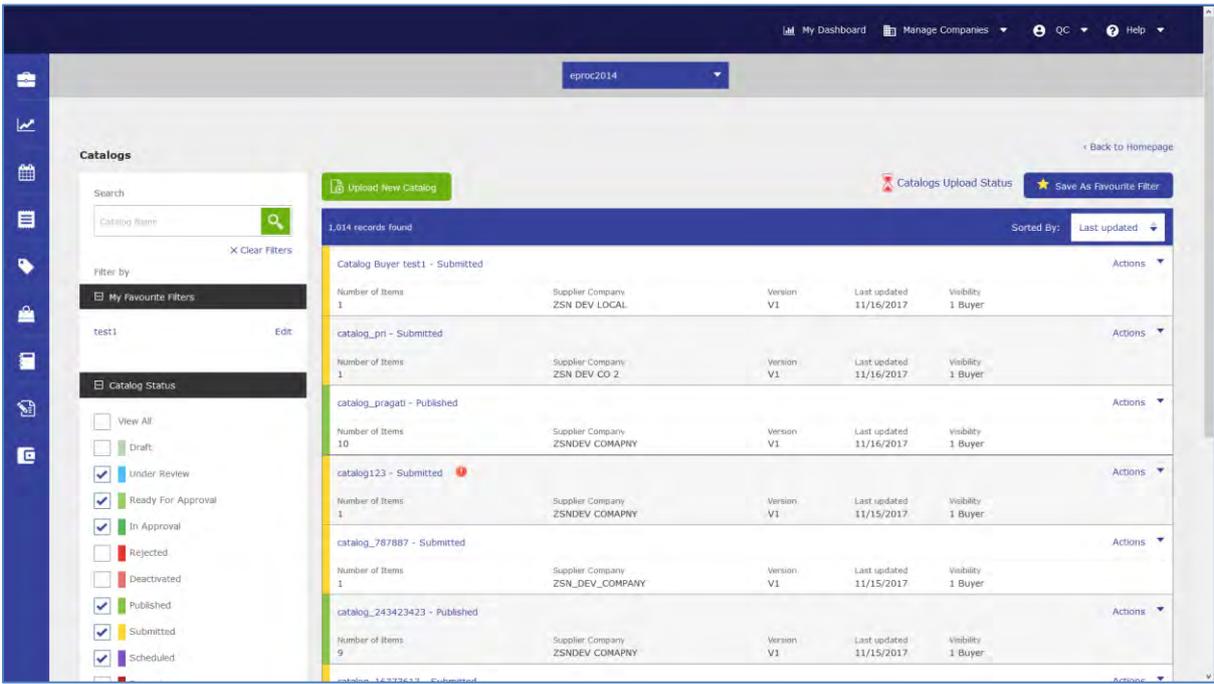
### 6.9.3 Cloning a Catalog

Suppliers who have similar catalogs for more than one customer can reduce the time spent on creating new catalogs every time. Once a catalog is fully set up, it can be cloned to copy all relevant details. Supplier can then focus only on the data to be changed (for example: Item price, discount details, and so on) and submit the catalog.

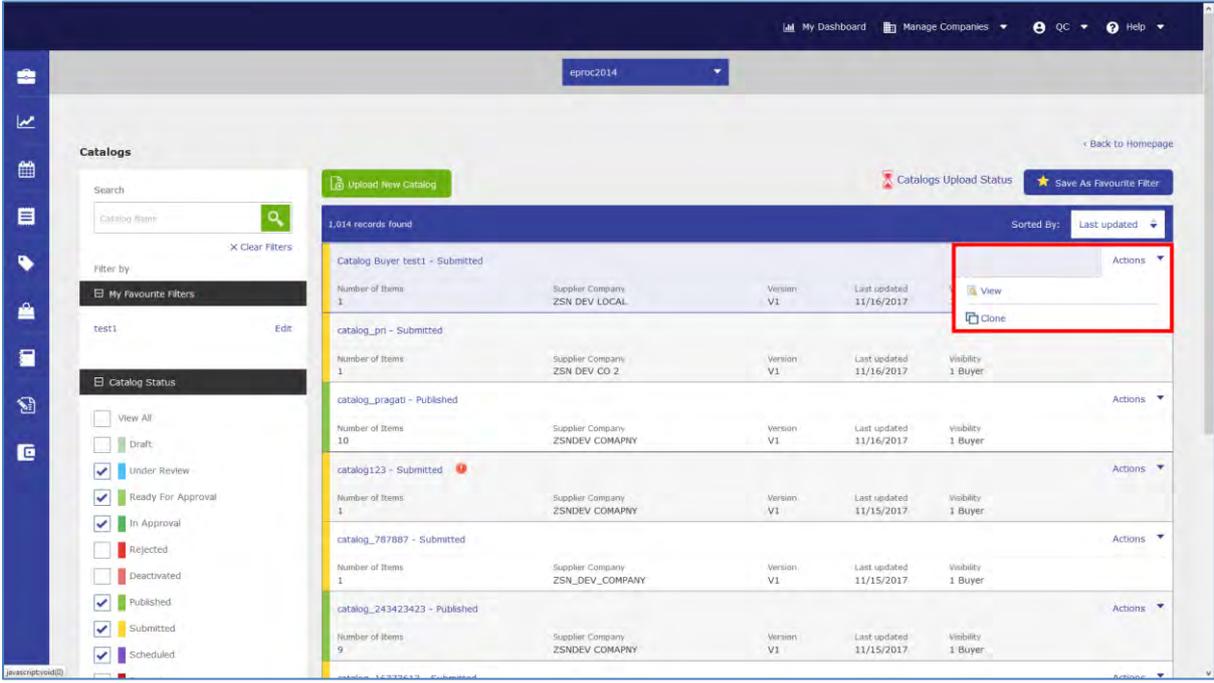
**Note:** All catalogs (except those in Draft state) can be cloned.

Let's take a look at this in action. To clone a contract:

1. Go to the Catalog listing page from side panel > My Catalog > View/Update Catalogs > select buyer company.



2. On this listing page, click the **Actions** option to clone an existing catalog. You will see the option to clone that catalog as shown in the image below:



3. Once you click to clone, you will need to select a buyer for whom you are cloning the catalog.

## Customer List

Customer\*:

--Select--

Please select a customer from the below list to proceed

Clone

4. Choose a buyer from the drop-down list and click **Clone**. You will be redirected to the **Catalog Details** page:

My Dashboard Manage Companies QC Help

### Upload Catalog Wizard

Clone Catalog

- 1 Catalog Details
- 2 Upload Catalog
- 3 Item Details
- 4 Validate and Publish

Catalog Name\* :   
Maximum length 80 characters

Customer : ZSPDEV1

Buyer Email Id :

Supplier Company\* :

Contact : QC

Contact Email Id : suresh@zycus.com

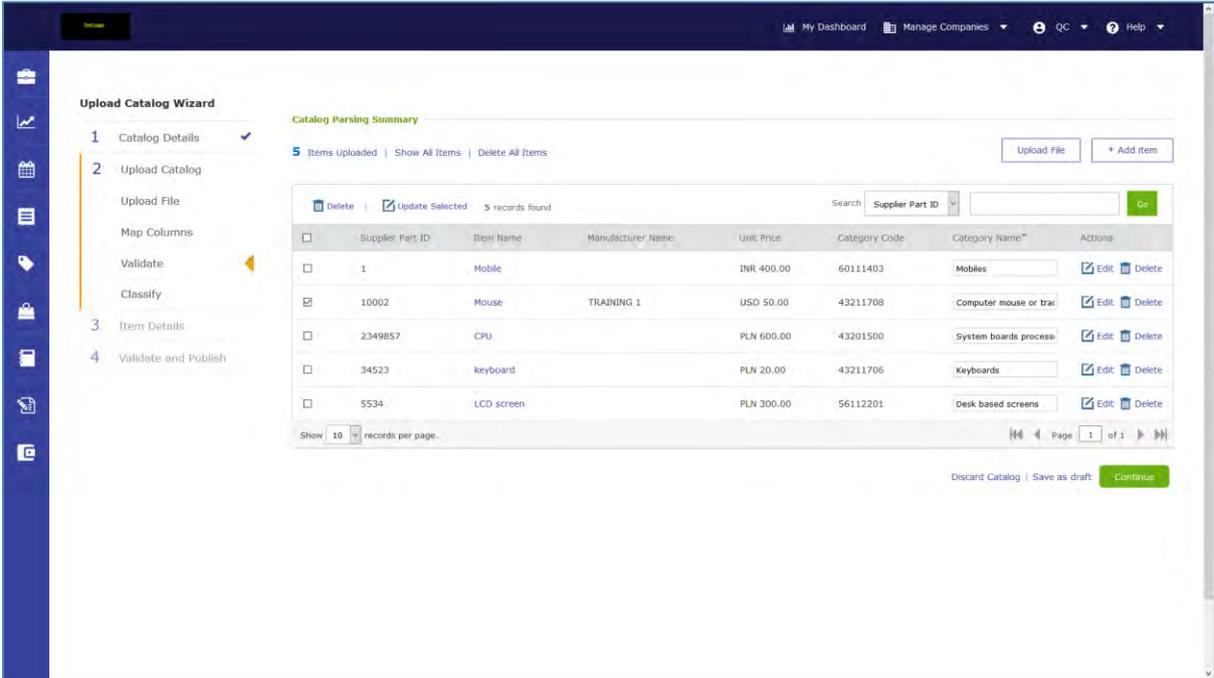
Catalog Type : Product Catalog

Catalog Taxonomy :  System Standard  Custom Taxonomy

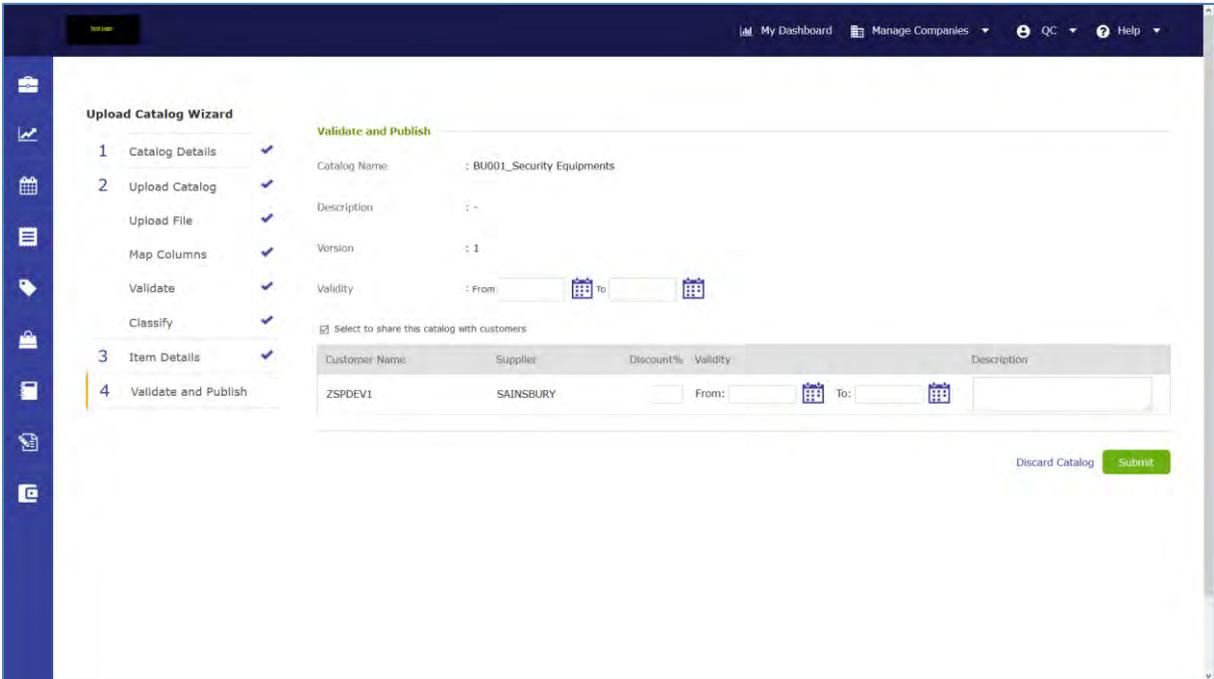
Description :   
Maximum length 2000 characters

Discard Catalog Continue

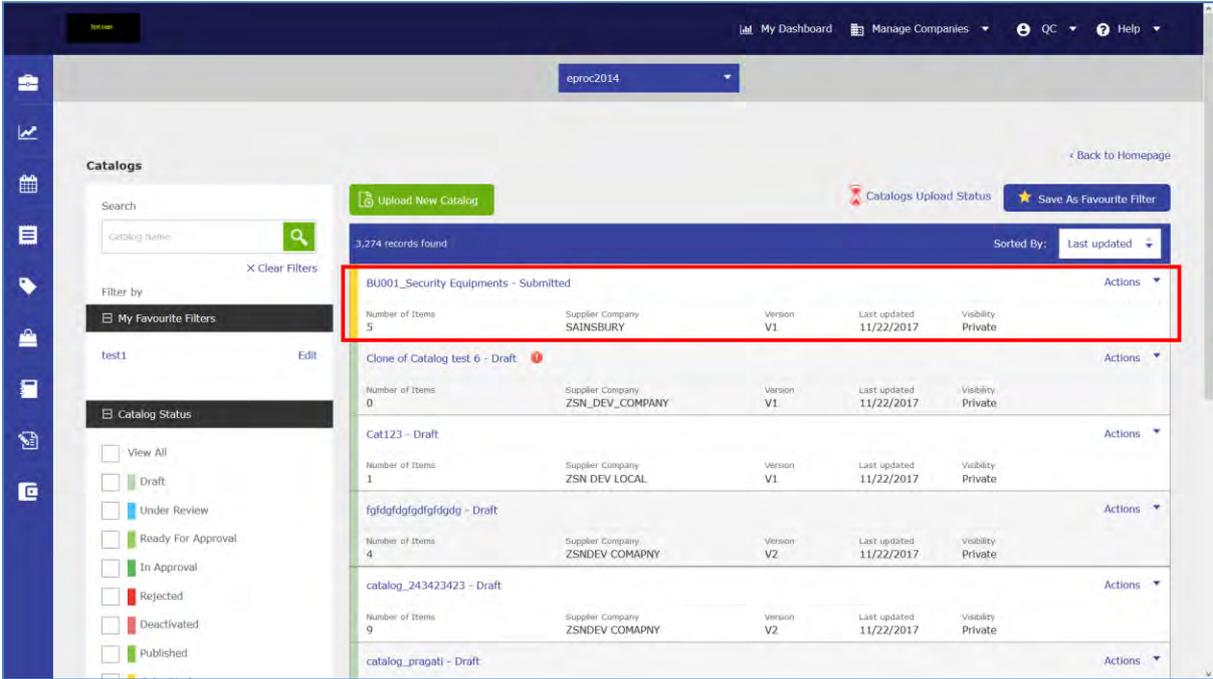
5. Fill in the mandatory details such as **Catalog Name** and your **Supplier Company**. Click **Continue**.
6. The next step will be to add/update the items in your catalog as shown in the image below:



- All the items from the original catalog will be replicated in the new catalog. You can choose to add, remove, or update the items from the catalog. For more help on adding items to the catalog, refer [Upload Catalog](#).
- Once all the items are added, click **Continue**. The next step is to review and enter the validity for your catalog as shown below:



9. Once the required information is added, click **Submit**. You will be able to view your submitted catalog on the listing page as shown below:



## 6.9.4 Catalog Versioning

1. When the user edits a catalog, a new version of that catalog is created.
2. Version numbering is denoted as V1, V2, and so on.
3. Catalog versioning is visible on the catalog listings page as shown below:

The screenshot shows the Zycus Supplier Network interface. The top navigation bar includes 'ZYCUS', 'My Dashboard', 'Manage Companies', 'Zeba', and 'Help'. The main content area is titled 'Supplier Portal Buyer 1' and features a search bar and a filter by 'Catalog Status' section. The catalog listing table shows 151 records found, sorted by 'Last updated'. The table has the following columns: No. of Items, Supplier Company, Version, Last updated, and Visibility. A red box highlights the 'Version' column, showing V1 and V2 for different catalog entries.

No. of Items	Supplier Company	Version	Last updated	Visibility
1	ZYCUS SUPPLIER	V1	19/08/2016	1 Buyer
1	ZYCUS SUPPLIER	V2	06/09/2016	Private
1	ZYCUS SUPPLIER	V2	18/08/2016	1 Buyer
19	REMIT TO ADDRESS	V1	08/08/2016	Private
0	ZYCUS SUPPLIER	V1	08/08/2016	Private

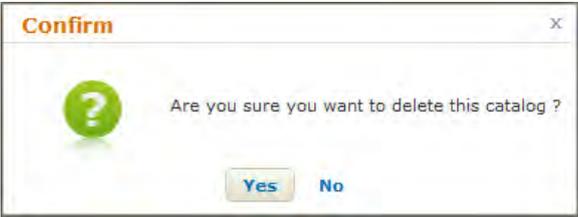
**NOTE:** All the existing catalogs will be considered as Version 1.

4. Once a supplier edits a Published catalog, a newer version will be created. The older version will also be available on the listing page.
5. Once the latest version is published, then supplier will not be able to take any actions from the previous versions.

### 6.9.5 How to Delete a Catalog?

**To delete a Catalog:**

- 1. Navigate to the following location: Side Panel > **My Catalogs** > **View Catalogs** > Required Customer Company
- 2. Look for the required Draft or Deactivated catalog using the Search, Filter or Sort options
- 3. For the required Draft or Deactivated Catalog, click on the  **Delete** icon corresponding to it



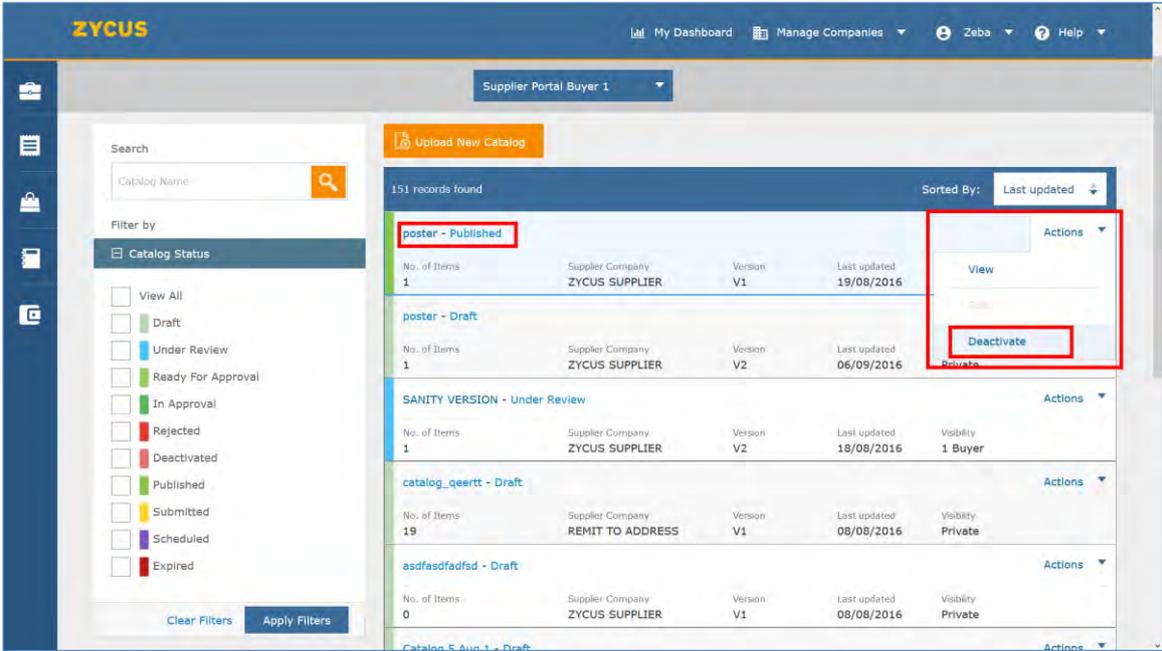
- 4. Click **Yes** to delete the catalog

 *Published Catalogs cannot be deleted unless deactivated first.*

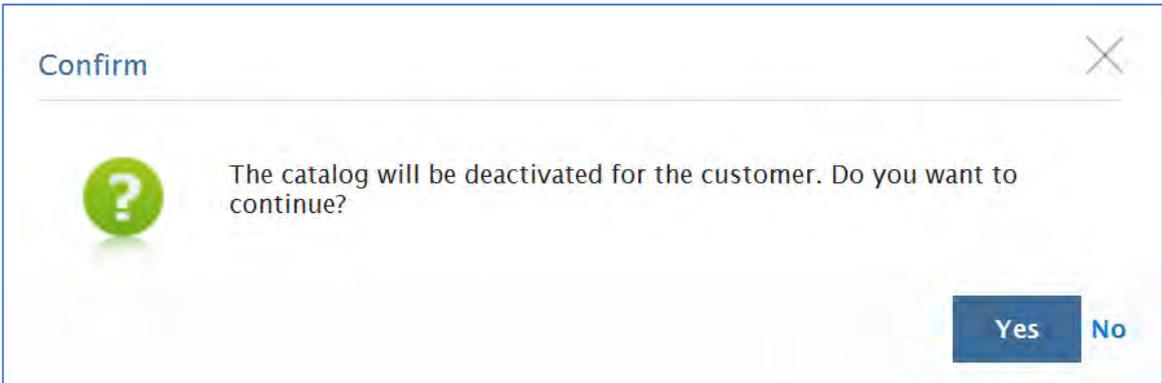
 *On deleting catalogs, the respective buyer company will be notified. Also the same catalog will be updated in eProc with status Deleted*

### 6.9.6 Deactivating a Catalog

- 1. You can choose to deactivate a catalog created for your company from ZSN.
- 2. You will only be able to deactivate a **Published** catalog.
- 3. To deactivate a catalog, go to the Catalogs listing page.
- 4. Filter the catalogs with **Published** status.
- 5. For a given catalog, click on the **Actions** drop-down menu and click **Deactivate**.



- 6. A **Confirmation** popup will appear. Click **Yes**.



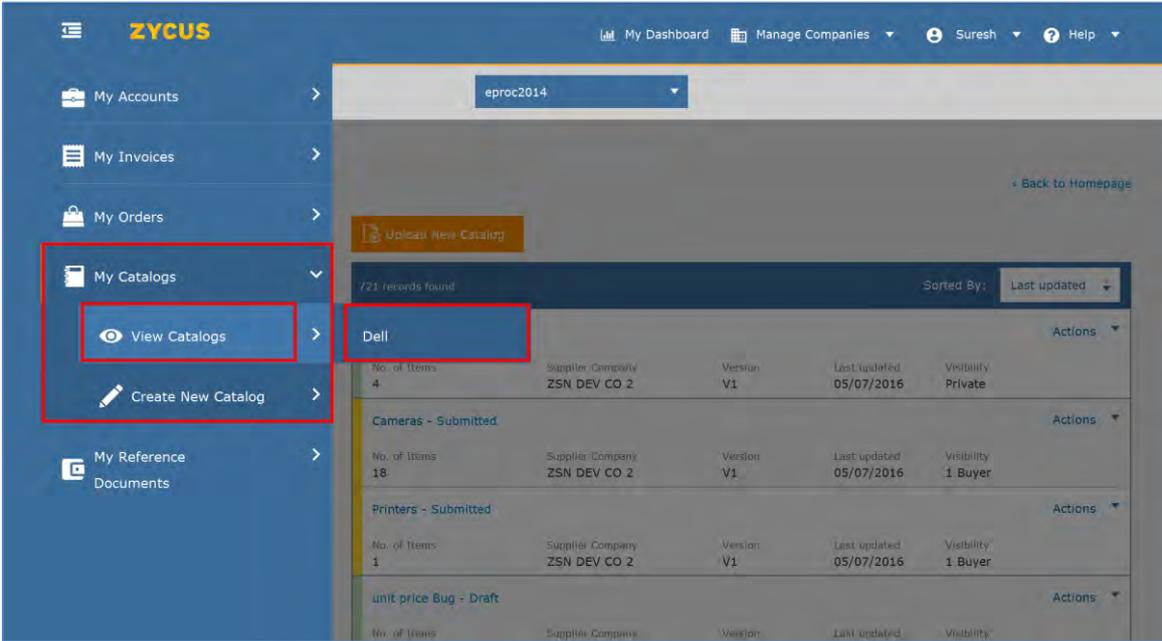
- 7. Catalog will be successfully deactivated.

### 6.9.7 Catalog Audit Trail

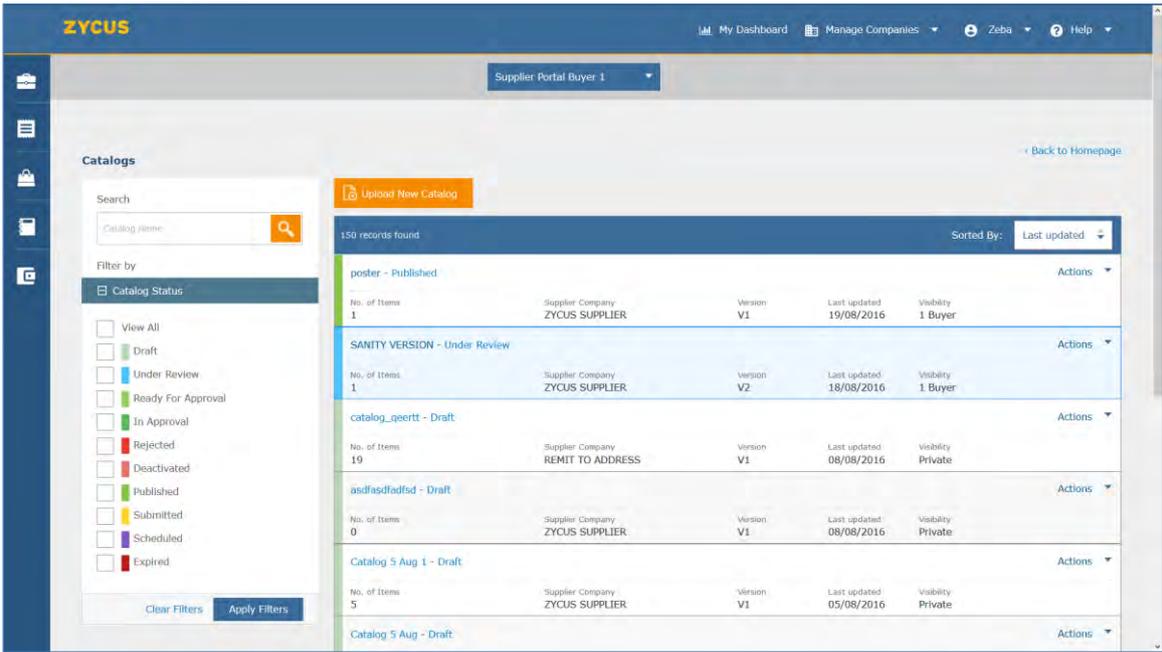
Audit trail offers a functionality to track the changes in the catalog created against the supplier company.

To access audit trail, follow the given steps:

- 1. From the side panel, go to **My Catalogs**.
- 2. Hover over **View Catalogs**.
- 3. Click on the customer company name for which you want to view the catalogs.



4. The catalog listing page will be displayed as shown below.



5. Click on the Catalog name you wish to view. On clicking the catalog name, following page will be displayed:

The screenshot displays the Zycus Supplier Network interface for a catalog named 'poster'. The interface includes a navigation sidebar on the left and a main content area with several sections:

- Catalog Details:** A list of key-value pairs for the catalog, including Customer (Supplier Portal Buyer 1), Buyer Email Id, Supplier Company (ZYCUS SUPPLIER), Contact (Zeba), Contact Email Id (zeba.eproc@zycus.com), Catalog Type (Product Catalog), Catalog Taxonomy (System Standard), Validity, Version (1), and Description.
- Shared (1):** A table showing one shared item with columns for Customer Name, Supplier, Discount%, Shared on, Validity, and Status.
- Category View:** A search interface for categories with a search box and a 'Go' button. Below is a table with columns for Category Code, Category Name, and Count.
- Item View:** A search interface for items with a search box and a 'Go' button. Below is a table with columns for Item Name, Supplier Part ID, Manufacturer Name, Category Code, Category Name, and Price.
- Audit Trail:** A table showing the history of actions performed on the catalog, including 'Catalog Published', 'Catalog Under Review', and 'Catalog Submitted'. This section is highlighted with a red border in the image.

At the bottom of the interface, there is a 'Done' button and a footer with copyright information and links to Terms of Use and Privacy Policy.

**ZYCUS**
My Dashboard | Manage Companies | Zeba | Help

**poster** Published

---

**Catalog Details**

Customer : Supplier Portal Buyer 1  
 Buyer Email Id : -  
 Supplier Company : ZYCUS SUPPLIER  
 Contact : Zeba  
 Contact Email Id : zeba.eproc@zycus.com  
 Catalog Type : Product Catalog  
 Catalog Taxonomy : System Standard  
 Validity : -  
 Version : 1  
 Description : -

---

**Shared (1)**

Total: 1

Customer Name	Supplier	Discount%	Shared on	Validity	Status
Supplier Portal Buyer 1	ZYCUS SUPPLIER	N/A	19/08/2016	N/A	Shared

---

**Category View**

Total: 1 Search  Category Name

Category Code	Category Name	Count
94132003	Physical or mental torture defense associations	1

Show 10 records per page. Page 1 of 1

---

**Item View**

Total: 1 Search  Item Name

Item Name	Supplier Part ID	Manufacturer Name	Category Code	Category Name	Price
test	43321	-	94132003	Physical or mental torture defense associations	USD 147.00

Show 10 records per page. Page 1 of 1

---

**Audit Trail**

Total: 10

Action	User	Version	Date/Time	Message
Catalog Published	Catalog Manager	V1	19/08/2016 1:47 PM	-
Catalog Under Review	Catalog Manager	V1	19/08/2016 1:47 PM	-
Catalog Published	Catalog Manager	V1	19/08/2016 12:24 AM	-
Catalog Under Review	Catalog Manager	V1	19/08/2016 12:23 AM	-
Catalog Published	Catalog Manager	V1	19/08/2016 12:23 AM	-
Catalog Under Review	Catalog Manager	V1	19/08/2016 12:22 AM	-
Catalog Published	Catalog Manager	V1	19/08/2016 12:22 AM	-
Catalog In Approval	Catalog Manager	V1	19/08/2016 12:21 AM	-
Catalog Under Review	Catalog Manager	V1	19/08/2016 12:21 AM	-
Catalog Submitted	Zeba Khalil	V1	19/08/2016 12:21 AM	-

Show 10 records per page. Page 1 of 1

---

**NOTE:** Audit Trail will only be visible in **View** mode, not in **Edit** Mode. This applies as Audit Trail will only

[Click Here to Give Feedback](#)

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be visible for catalogs with following status:

- Under Review
- Ready For Approval
- In Approval
- Rejected
- Deactivated
- Published
- Submitted
- Scheduled
- Expired

6. Audit trail will be visible at the bottom of the page. Audit trail captures the following data:

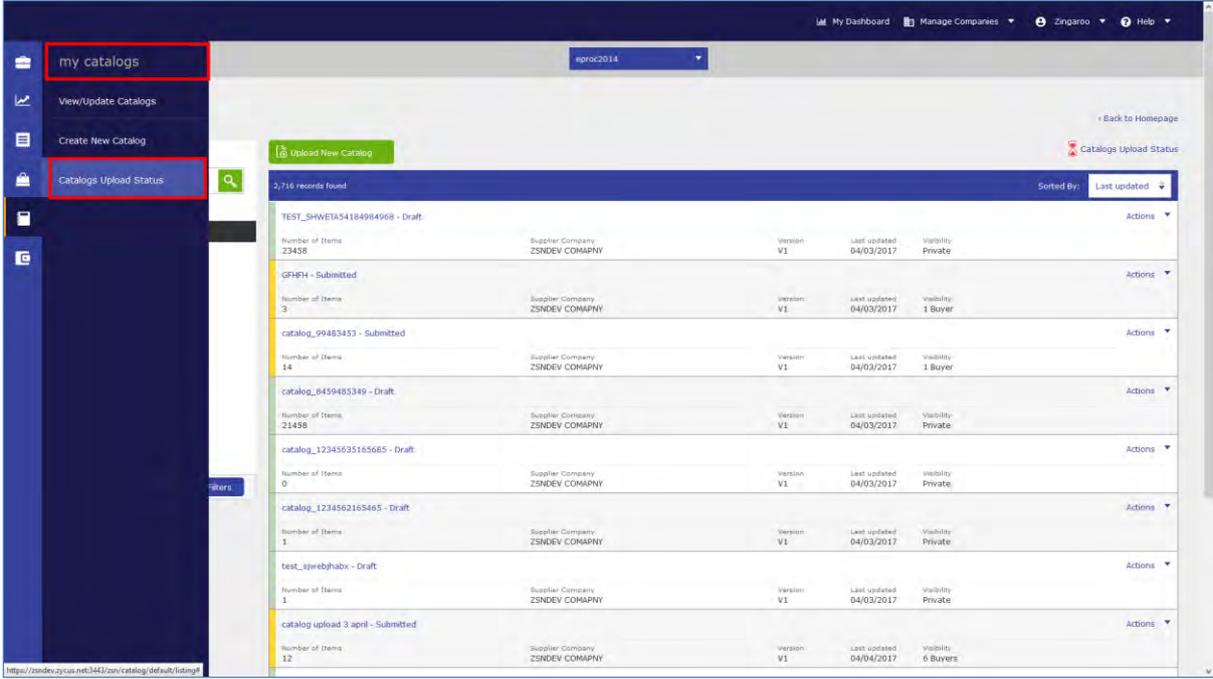
- a) **Actions:** Actions performed on the catalog. Various actions that can be performed on the catalog are:
  - Submit - Catalog Submitted
  - Activate - Catalog Submitted once published in eproc then it will move to Catalog Published.
  - Deactivate - Catalog Deactivated
  - Edit & Submit - Catalog Updated
  - Ready for approval - Catalog Ready for approval
  - In Approval- Catalog In Approval
  - Under Review - Catalog Under review
  - Rejected - Catalog Rejected
  - Scheduled - Catalog Scheduled
  - Expired - Catalog Expired
- b) **User:** The user name who performed any action on the catalog
- c) **Version:** This will display the version number based on the modifications made to a catalog.
- d) **Date/Time:** Displays the time and date when actions were performed on the Catalog.
- e) **Message:** Displays comments added by the user in case any modifications made.

### 6.9.8 Catalog Upload Status

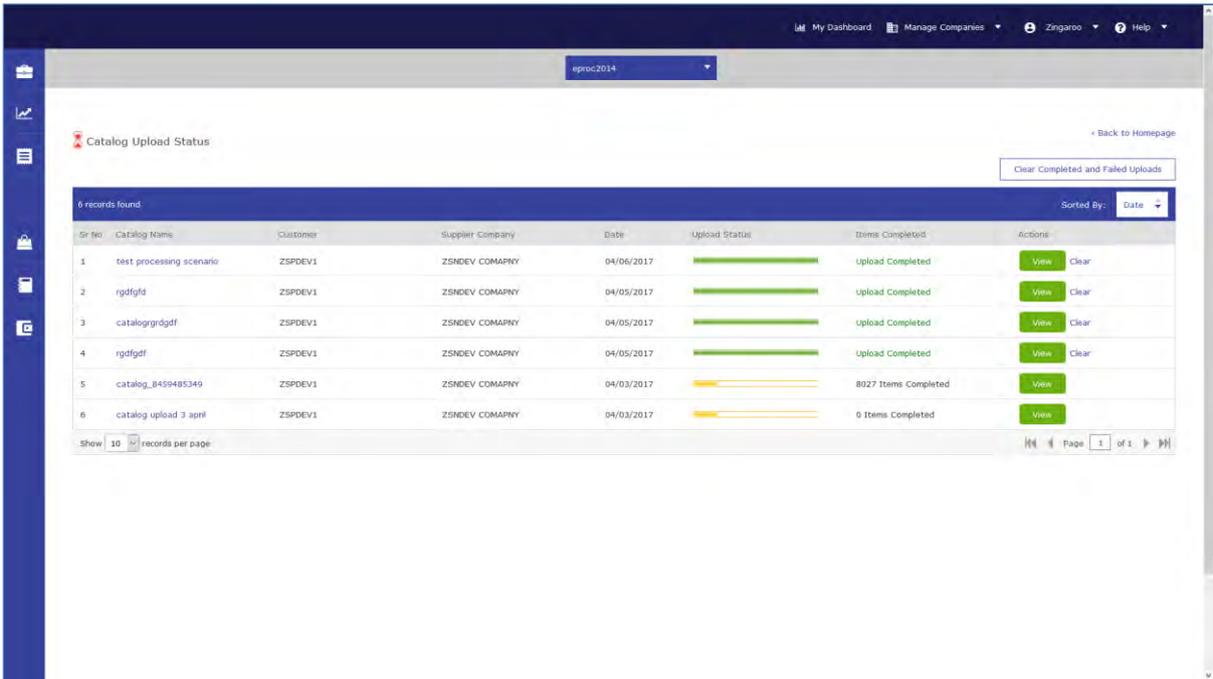
While uploading catalogs that are created offline, processing may take a while if the file size is big. To ensure that the user does not have to wait for this process to complete, ZSN runs the upload process in the background. This will enable the users to access other pages of ZSN without any hindrance.

If the user wants to check the status of their uploaded catalog, then they can view it from Catalog Upload Status page.

1. To access this page, go to **Side Panel > My Catalogs > Catalog Upload Status** as shown below:



2. You will land on the following page:



3. This page will display the following information:
  - Catalog Name
  - Customer Name
  - Supplier Company Name
  - Date on which the catalog was uploads
  - Upload Status
  - No. of Items uploaded from the catalog
  - Actions:
    - View the uploaded catalog
    - Clear the catalog names which have been successfully uploaded
4. If you want to clear all the catalogs that are uploaded or failed, then click the highlighted button as shown below:

The screenshot displays the 'Catalog Upload Status' page in the Zycus Supplier Network. The page title is 'Catalog Upload Status' and it includes a 'Back to Homepage' link. A button labeled 'Clear Completed and Failed Uploads' is highlighted with a red box. Below the button, a table shows 6 records found, sorted by Date. The table columns are Sr No, Catalog Name, Customer, Supplier Company, Date, Upload Status, Items Completed, and Actions. The Actions column contains 'View' and 'Clear' buttons for each record.

Sr No	Catalog Name	Customer	Supplier Company	Date	Upload Status	Items Completed	Actions
1	test processing scenario	ZSPDEV1	ZSNDEV COMAPNY	04/06/2017	Upload Completed	Upload Completed	View Clear
2	rgdfgfd	ZSPDEV1	ZSNDEV COMAPNY	04/05/2017	Upload Completed	Upload Completed	View Clear
3	catalogrgdfgfd	ZSPDEV1	ZSNDEV COMAPNY	04/05/2017	Upload Completed	Upload Completed	View Clear
4	rgdfgfd	ZSPDEV1	ZSNDEV COMAPNY	04/05/2017	Upload Completed	Upload Completed	View Clear
5	catalog_8459485349	ZSPDEV1	ZSNDEV COMAPNY	04/03/2017	Upload Completed	8027 Items Completed	View
6	catalog upload 3 april	ZSPDEV1	ZSNDEV COMAPNY	04/03/2017	Upload Failed	0 Items Completed	View

**Note:** This page will auto-refresh in every five seconds which will give you a real time update on the progress of your catalog upload.

### 6.9.8.2 Mail Updates on Catalog Uploads

As a user, if you have uploaded a catalog on ZSN, then you will receive emails for change in the Catalog Status when:

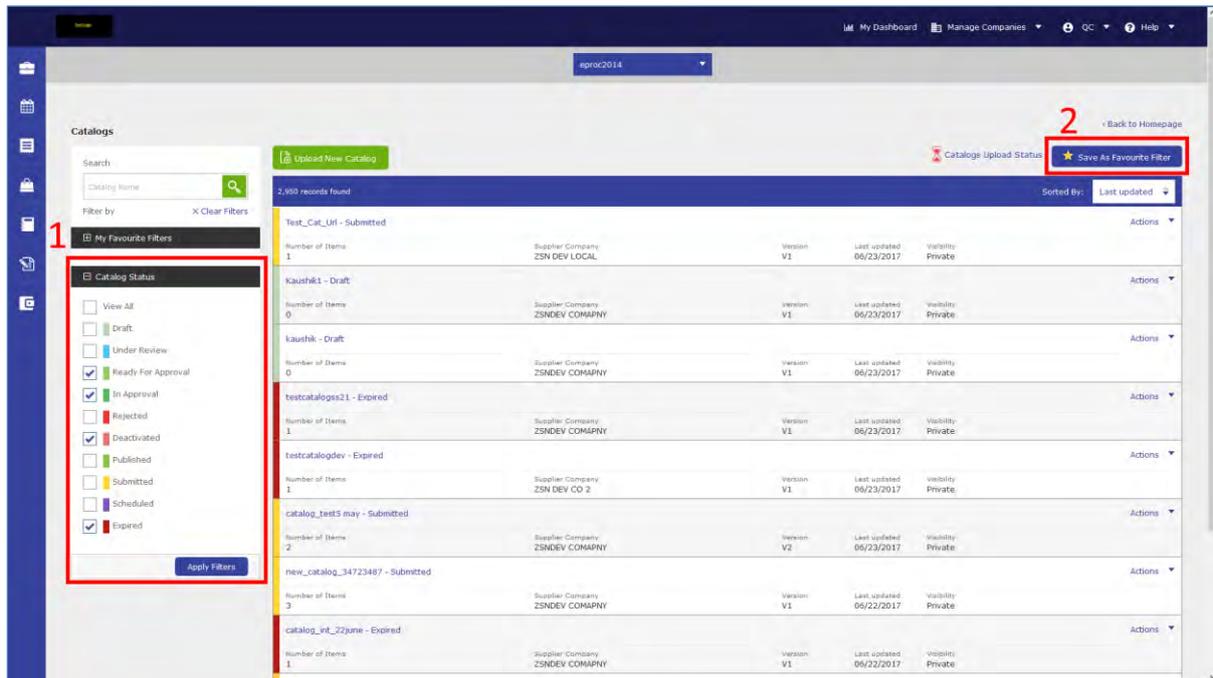
- The upload is successful
- Or the upload has failed

### 6.9.9 Marking Filters as Favorites

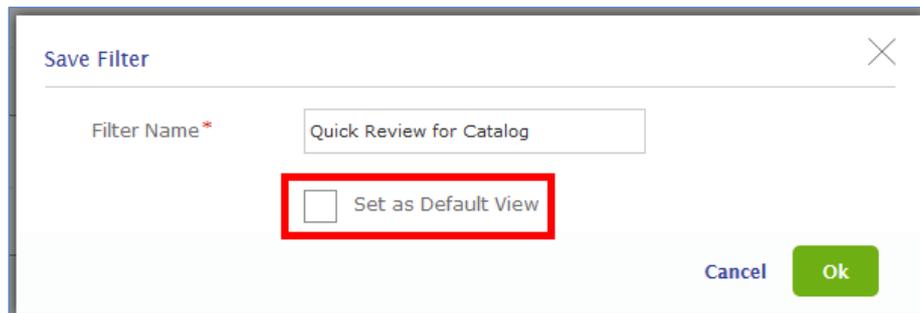
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

To mark filter as favorite,

1. Select the filter parameters from the left panel and click the **Save as Favorite Filter** button as shown in the image below:

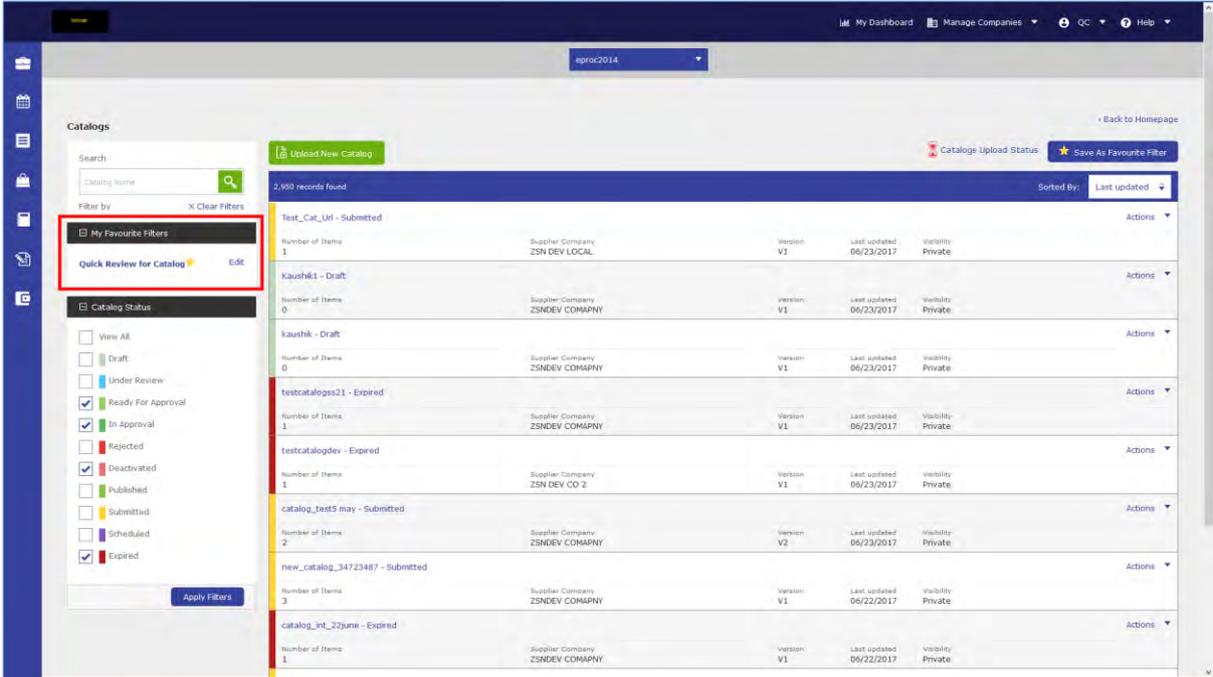


2. Once you choose to save a filter, you will have to name it as shown below:

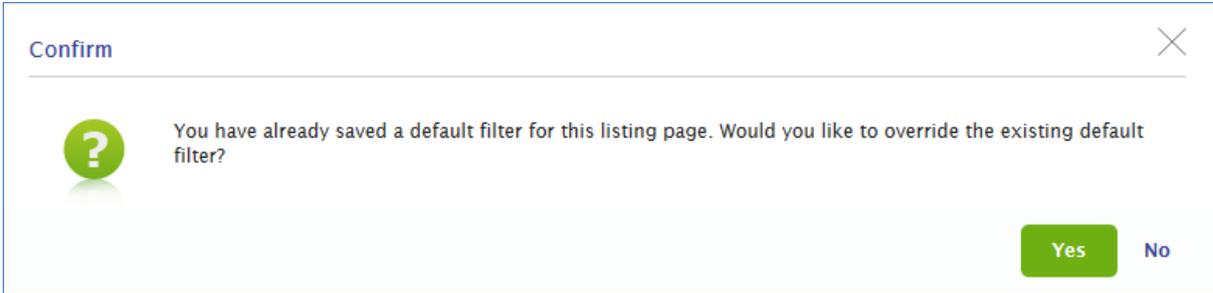


3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.

4. Saved filters will be available in the left panel of the listing page as shown below:

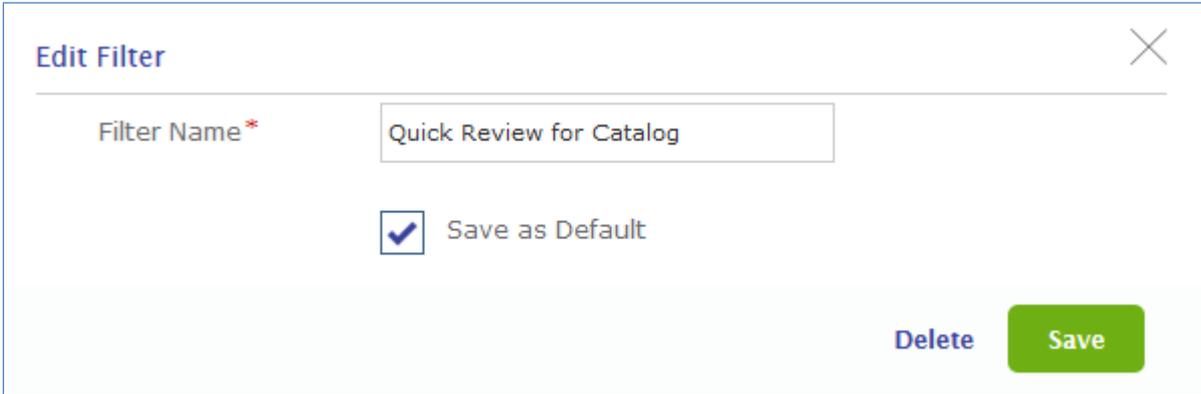


5. You can have only one filter set as default. If you make another filter as default, then it will override the existing favorite filter and you will be notified as shown below:



6. Click **Yes** if you wish to override the existing default filter.

7. To remove a filter from favorite, go to the left panel and click **Edit** against a filter.



8. Uncheck the box against **Save as Default** and click **Save**.
9. If you wish to delete a filter, click **Delete** in the popup shown above.

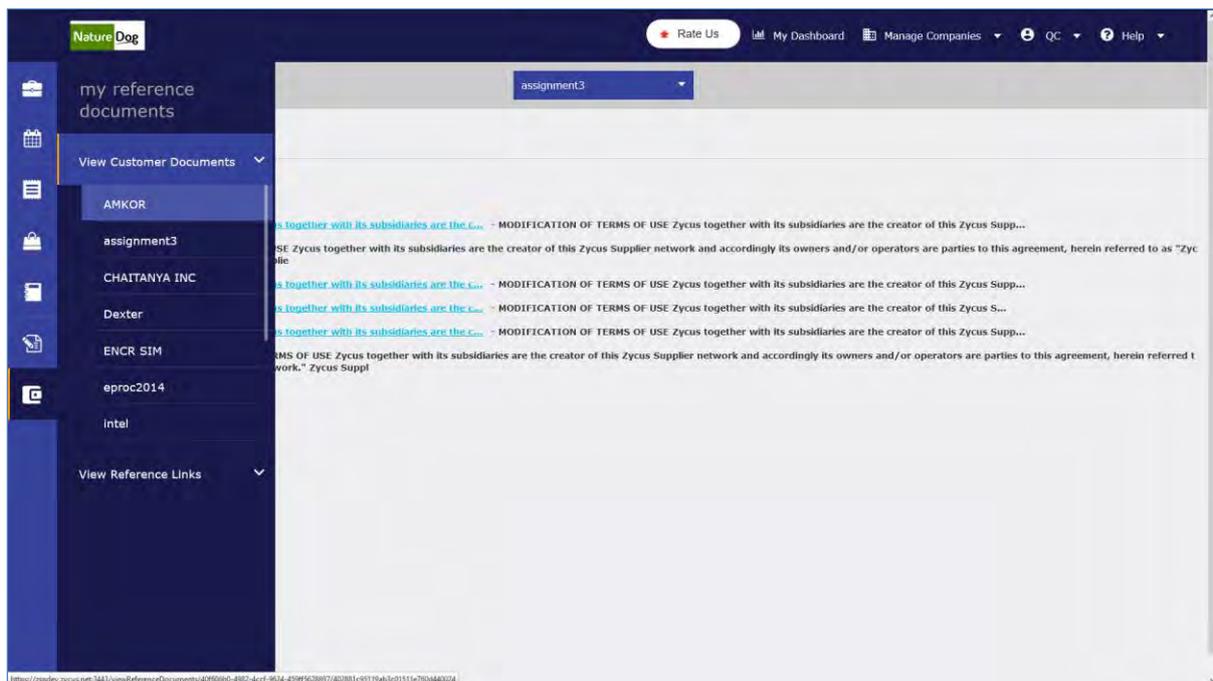
## 6.10 From Where can I Access My Reference Documents?

**NOTE:** The above-mentioned menu may or may not be available based on the access provided to you by customer.

The **My Reference Documents** allows the user to view the reference documents for each customer even if the user is registered for the first time.

### 6.10.1 View Customer Documents

1. Click on **My Reference Documents**, you will get an option of **View Customer Documents**.
2. Hover over **View Customer Documents**, you will get a list of customers for which you want to view the attached documents.



3. You will be then able to view the reference documents related to customer.

### 6.10.2 View Reference Links

4. Any links added by the buyer will be visible under **View Reference Links**. Select a buyer by clicking the drop-down menu. You will land on the following page:

