**Product Catalog**

**Add Item**

**To Add Item using a csv file**

**To add item during traactions**

**Product Catalog**

Product catalogs allows a company to add their products information in a central repository which is than available to all the company authorized users anywhere in the world.

There are three tabs under the Product catalog tab

**Price Catalog**: Give a list of all the inventory

**Add Item:** Used to add an item to the catalog list.

**Add CSV File**: Used to import items in the product catalog using a .csv file upload

**Add Item**

* Under the “Transaction” tab select the product Catalog tab.
* Click the “Add Item” tab
* Add the item details
* Hit “Add”

**To Add Item using a CSVfile**

**Note:** A sample template can be obtained using the “?” button. Make sure that your data is arranged in the correct format as specified in the template.

* Under the “Corporate” tab select the Product Catalog tab.
* Click the “Add CSV File” tab.
* To upload the CSV file click Browse and choose the file that you want to import

**Note:** The upload Data routine accepts data saved in a CSV (Comma Separated Variable) format.

**Note:** The first line in the file must contain the name of field for that column, using our standard column headings

* Click Upload
* You will get the “File uploaded successfully” message. In case the file is not uploaded,check the file format and make sure that the format is correct and the file is a CSVfile.

**To add item during transactions**

In case the item you want to generate an RFQ, Quote, PO or Invoice is not in the product catalog, that item can be added to the product catalog by

Click add Item

On the item selection popup menu select new item

Add items details and click OK

The item has been added to the product catalog and now you can use it.

|  |  |  |
| --- | --- | --- |
| **Fields** | **Status** | **Description** |
| Item Name | M | **The Item Name** is a name, especially one legally registered as a trademark, used by a manufacturer or merchant to identify its products distinctively from others of the same type and usually prominently displayed on its goods, in advertising, etc. | |
| Part# | O | A combination of numbers, letters, and symbols assigned by a designer, a manufacturer, or vendor to identify a specific part or item of materiel. |
| SKU | - | A **stock-keeping unit** or **SKU** is a unique identifier for each distinct product and service. A SKU is a number or string of alpha and numeric characters that uniquely identify a product. The usage of SKU is rooted in data management, enabling the company to systematically track its inventory or product availability, such as in warehouses and retail outlets. |
| Quantity Needed | M | Specified number or amount items. |
| Price | M | Item price |
| Currency |  | Currency used |
| Tax rate | M | Tax percentage applicable |
| Business Category | M | A basic category of business activity. The term is sometimes used to describe a very precise business activity (e.g. semiconductors) or a more generic business activity (e.g. consumer durables). |
| Select the Source | - | Database source. |
| Upload | - | Upload a file |
| Database Connection | - | Specify the kind of database connection |
| Username | - | Username to login into the remote database |
| Password |  | Password to login into the remote database |
| Select Database Source |  | Database source   * Access * MySQL |

**Transaction**

**Request for Quote (RFQ)**

* Generating a RFQ using the search
* What is RFQ
* Generating RFQ without using the search option
* Generating a RFQ to non SupplyMedium members

**Quote**

* What is Quote
* Generating Quote using the RFQ
* Generating a Quote without a RFQ
* Generating a Quote to non SupplyMedium members
* Acknowledge Quote

**Purchase Order (P.O)**

* What is P.O
* Generating P.O using the Quote
* Generating a P.O without a Quote
* Generating a P.O to non SupplyMedium members
* Acknowledge P.O
* P.O Change

**Invoice**

* What is Invoice
* Generating Invoice using the P.O
* Generating an Invoice without a P.O
* Generating an Invoice to non SupplyMedium members
* Acknowledge Invoice
* Invoice Change

**Transaction History**

Transaction history contains the transaction details of all the transactions done by the Company/Business using SupplyMedium.

Transaction history page in under transactions Tab. Under transaction history you will see the **Customer History page.** The page lists the details of all the customers that your company had transitioned with. The different columns under customer history page are

* Phone No
* Company Name
* Address:
* Email
* Documents: This is where you can download the EDI files for all the transactions. EDI files are downloaded in a zip file.

Clicking on any of the fields above will take you to the

* Transaction History
* Payment History

**Transaction History**

Transaction History page lists each transaction in an itemized format. The different columns under Transaction history page are

* Type: The type identifies who initiated the transaction The green arrow facing downwards tells us that it was an incoming transaction, i.e., it was initiated by the other company, and a green arrow facing upwards tells us that it was an out coming transaction, i.e., it was initiated by the our company.
* Transaction No: the transaction number
* Date: date of the transaction
* Amount: Amount of the transaction
* XML File: The EDI XML file for that transaction
* Status: The payment status of the transaction, either paid or unpaid.

**Payment History**

Payment History page lists each transaction in an itemized format. The different columns under Transaction history page are

* Type: The type identifies who initiated the transaction The green arrow facing downwards tells us that it was an incoming transaction, i.e., it was initiated by the other company, and a green arrow facing upwards tells us that it was an out coming transaction, i.e., it was initiated by the our company.
* Transaction No: the transaction number
* Date: date of the transaction
* Amount: Amount of the transaction
* Status: The payment status of the transaction, either paid or unpaid.

**Terms & Conditions**

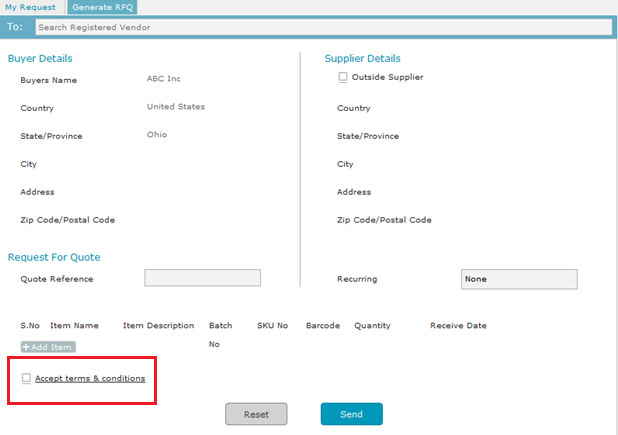
A company can upload there upload their company “Terms and Conditions” for RFQ, Quote, PO or Invoice. Go to the “Terms and Conditions” page under the transaction tab. There are four tabs under Terms and Conditions

* RFQ
* Quote
* Purchase Order
* Invoice

You can either upload a txt file or simply copy and paste the terms and conditions for RFQ, Quote, PO or Invoice.

* **Upload Text File:** On the RFQ, Quote, PO or Invoice page click on the Plus icon “Click to upload as Test file”. In the popup window browse to the file location and select the file and Hit Open. The file will be upload.
* **Copy/paste:**On the RFQ, Quote, PO or invoice page click on the Plus icon “Click to copy/paste Terms and Conditions”.In the Content popup window copy and paste the text. Hit Save. The file will be saved.

Once Terms and Conditions are added they will be attached to the transaction form. For example, you attach Term and Conditions for the RFQ. When you go to Generate RFQ page under the transaction tab andclick on the Term and condition link the Terms and conditions will be displayed in a popup window



The suppliers who receives the RFQ can also read the Terms and Conditions by clicking on the Terms and Conditions link when he receives the RFQ.

**What is Request for Quote (RFQ)?**

*A* ***request for quotation*** *(****RFQ****) is a standard business process whose purpose is to invite suppliers into a bidding process to bid on specific products or services. Information like payment terms, quality level per item or contract length are possible to be requested during the bidding process.*

There are two tabs under the RFQ tab

**My Request**: Gives a list of all the RFQ generated by the company

**RFQ Form**: Used to view existing RFQ’s and to generate new RFQ’s.

**Generating a RFQ using the search option**

For details on searching buyers/suppliers refer to the section Search Buyers/Suppliers

**Generating RFQ WITHOUT using the search option (Registered Supplier)**

**Note: Registered Suppliers** are those suppliers that have be registered to the company by accepting the Vendor Registration Form. This is sort of a preferred vendor list.

**Non-Registered Suppliers**

* Under the “Transaction” tab select the RFQ tab.
* Click the “RFQ Form” tab
* Your company details will be automatically populated under Buyer Details.
* In the “To:” search bar type the customer name you want to send the RFQ to. When you are typing the customer name a list will be displayed and you can also choose the company from that list.
* Select the customer and press enter
* The “Supplier Details” fields will be automatically be populated with the supplier information.
* The “Quotation Reference” will be automatically be populated with the details ofthe items if responding to a RFQ.
* The buyer also has the option to make the quote recurring. In case you want to make the RFQ recurring select the frequency of recurrence, for example, weekly. “Once is selected by default.
* Item name: Specify the Item name
* Part Number: Give the part number for that item. This field is optional
* Quantity: Specify the quantity needed and the units of measure, for example, tons, boxes etc.
* Ship date: Specify the date when the item are needed
* If what to add an item to the search hit the “Add Item” button.
* Check “Accept Terms and conditions”
* Hit “Send”

Once the buyers send the Request for Quote (RFQ) the seller is notified in the following ways

* 1. A RFQ is send to the primary email account listed. The seller can view the RFQ and respond to it via email. A pdf copy is also attached with the message is send to the primary email
  2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has a RFQ waiting to be review
  3. The RFQ is also saved in the Buyers list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to RFQ to detail out their terms and conditions for the transaction.

**Generating RFQ WITHOUT using the search option (Non-Registered Supplier)**

**Generating a RFQ to non SupplyMedium members**

* Select the Request for Quote from
* Date is today’s date
* The Quote reference number is selected automatically
* Buyers name will be selected automatically.
* Check the “Outside Supplier” check box. Clicking this check box will display an email field. This is a mandatory field if a company which is not registered with SupplyMedium needs to be contacted.
* The Supplier name can be filled in manually by the buyer.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* Add addition requirements by clicking the Additional Detail link
* If what to add an item to the search hit the Add an Item button.
* In case the quote is recurring
* Hit “Send RFQ”

Once the buyers send the request for quote the seller is notified in the following ways

1. A RFQ is send to the supplier email account specified. The seller can view the RFQ and respond to it via email. A pdf copy is also attached with the message is send to the primary email.
2. The RFQ is also saved in the Buyers list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to RFQ to detail out their terms and conditions for the transaction.

**Note:** The non-registered supplier will be sent an invitation email from SupplyMedium to join the website on the email address provided by the buyer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Fields** | **Status** | **Max/Min** | **Type** | **Description** |
| Date | M | 8/8 |  | Date Request for Quote (RFQ) is issued |
| Request For Quote (RFQ) Reference Number | M | 1/45 |  | Your Request for Quote Reference Number is a unique number that is assigned to each new quote. It is an ID number used to track and verify an issued estimate or quote.  This number will start with the prefix RFQ. |
| Outside Suppliers | - | - |  | In case the outside supplier is checked the user can generate quote to a company/organization that is not registered with SupplyMedium. If this box is checked an email box will appear. Filling this email box with a valid email address is mandatory for such quotes. |
| **Buyers name** | M | 1/60 |  | Buyers name |
| Suppliers Name | M | 1/60 |  | Supplier name |
| Address |  | 1/55 |  | Address information |
| City |  | 2/30 |  | Free-form text for city name |
| State |  | 2/2 |  | Code (Standard State/Province) as defined by appropriate government agency |
| Zip |  | 3/15 |  | Code defining international postal zone code excluding punctuation and blanks (zip code for United States) |
| Country/Region |  | 2/3 |  | Code identifying the country. U.S is selected by default. |
| Item Name | M | 1/80 |  | **The Item Name** is a name, especially one legally registered as a trademark, used by a manufacturer or merchant to identify its products distinctively from others of the same type and usually prominently displayed on its goods, in advertising, etc. |
| Part# | O |  |  | A combination of numbers, letters, and symbols assigned by a designer, a manufacturer, or vendor to identify a specific part or item of materiel. |
| Quantity Needed | M | 1/15 |  | Specified number or amount items. |
| Ship Date | M | 8/8 |  | Specifies the date on which the item is needed. This date can be changed in the P.O or invoice. |
| Recurring |  |  |  | DO we need recurring here |

**What is Quote?**

*A* [*formal*](http://www.businessdictionary.com/definition/formal.html)[*statement*](http://www.businessdictionary.com/definition/statement.html) *of* [*promise*](http://www.businessdictionary.com/definition/promise.html) *(submitted usually in* [*response*](http://www.businessdictionary.com/definition/response.html) *to a request for* [*quotation*](http://www.investorguide.com/definition/quotation.html)*) by potential* [*supplier*](http://www.businessdictionary.com/definition/supplier.html) *to* [*supply*](http://www.investorguide.com/definition/supply.html) *the* [*goods*](http://www.businessdictionary.com/definition/goods.html) *or* [*services*](http://www.businessdictionary.com/definition/services.html)[*required*](http://www.businessdictionary.com/definition/required.html) *by a* [*buyer*](http://www.investorguide.com/definition/buyer.html)*, at specified* [*prices*](http://www.investorguide.com/definition/price.html)*, and within a specified* [*period*](http://www.businessdictionary.com/definition/period.html)*. A quotation may also contain* [*terms of sale*](http://www.businessdictionary.com/definition/terms-of-sale.html) *and* [*payment*](http://www.businessdictionary.com/definition/payment.html)*, and* [*warranties*](http://www.businessdictionary.com/definition/warranty.html)*.* [*Acceptance*](http://www.businessdictionary.com/definition/acceptance.html) *of quotation by the buyer constitutes an* [*agreement*](http://www.businessdictionary.com/definition/agreement.html)[*binding*](http://www.businessdictionary.com/definition/binder.html) *on both* [*parties*](http://www.businessdictionary.com/definition/party.html).

There are two tabs under the Quote tab

**My Request**: Give a list of all the Quote’s generated by the company

**RFQ Form**: Used to view existing Quote’s and to generate new Quote’s.

**Generating Quote Using RFQ**

* Under the “Transaction” tab select the Quote tab.
* Click the “My Request” tab. It will list the new RFQ received and their status.
* If the status column is “Generate Quote” then a quote has NOT been generated for that RFQ.
* Click on the “Generate Quote” link
* This will open the Quotein the “QuoteForm” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, and date field will be grayed out. These fields cannot be change.
* The Price file will be editable. Here the supplier will enter the quote price for each item and specify the currency. US dollar is selected by default.
* The supplier can also apply a price multiplier for each item. By default the value of the multiplier is 1
* Hit “Send”. This will send the Quote to the buyer.

Once the buyers send Quotethe seller is notified in the following ways

* 1. A Quote is send to the primary email account listed. The seller can view the Quoteand respond to it via email. A pdf copy is also attached with the message is send to the primary email
  2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has a Quotewaiting to be review
  3. The Quoteis also saved in the Buyers list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to Quote to detail out their terms and conditions for the transaction.

**Acknowledge Quote**

Once the buyer receives the quote send by the seller he can review the quote and can either accept, reject or ask for more information. In case he accepts/rejects the quote the seller will receive acknowledgement email that he quote had been accepted/rejected by the buyer.

**Modify Quote**

Once the buyer receives the quote send by the seller and click “Modify Quote”.

**Quote Acknowledgement**

Once the Seller generates a quote it would be send to the buyer for review. The buyer can accept, reject or modify the quote. To respond to the Quote

* Under the “Transaction” tab select the Quote tab.
* Click the “My Request” tab. It will list the new RFQ received and their status.
* If the status column is “Acknowledge Quote” then a quote has NOT been acknowledged.
* Click on the “Acknowledge Quote” link
* This will open the Quote in the “Quote Form” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, date and price fields will be grayed out. These fields cannot be change.
* Here the buyer can accept the quote or reject it. In case the quote is accepted/rejected a conformation email will be send to the supplier listing the quote has been accepted/rejected
* If the buyer want to modify the quote the buyer can hit the modify button and
* Hit “Send”. This will send the Acknowledgement to the buyer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field** | **Status** | **Max/Min** | **Type** | **Description** |
| Date | M | 8/8 |  | Date Quote is issued |
| Quote Reference Number | M | 1/45 |  | Your Quote Reference Number is a unique number that is assigned to each new quote. It is an ID number used to track and verify an issued estimate or quote.  This number will start with the prefix Q and have numbers same as that for the request for Quote (RFQ). |
| **Buyers name** | M | 1/60 |  | Buyers name |
| Suppliers Name | M | 1/60 |  | Supplier name |
| Address |  | 1/55 |  | Address information |
| City |  | 2/30 |  | Free-form text for city name |
| State |  | 2/2 |  | Code (Standard State/Province) as defined by appropriate government agency |
| Zip |  | 3/15 |  | Code defining international postal zone code excluding punctuation and blanks (zip code for United States) |
| Country/Region | M | 2/3 |  | Code identifying the country. U.S is selected by default. |
| Item Name | M | 1/80 |  | **The Item Name** is a name, especially one legally registered as a trademark, used by a manufacturer or merchant to identify its products distinctively from others of the same type and usually prominently displayed on its goods, in advertising, etc. |
| Part# | O |  |  | A combination of numbers, letters, and symbols assigned by a designer, a manufacturer, or vendor to identify a specific part or item of materiel. |
| Quantity Needed | M | 1/15 |  | Specified number or amount items  Quantity that he can supply if lowers than that the indicated in the RFQ. Here he can add details of the reason for this reduced amount and when he can supply, if possible, the rest of the items |
| Ship Date | M | 8/8 |  | Specifies the date on which the item is needed. This date can be changed in the P.O or invoice. |
| Price | M | 1/17 |  | Item price |
| Currency |  |  |  | Currency used for the quote |
| **Multiplier** |  |  |  | The user has the ability to apply a multiplier for each item. The multiplier is used to discount the price of an item. For example consider that the price of an item is $100. In case a multiplier of 0.6 is used then the price will be reduced to $60. Typically the range is 0.1 to 1 however; higher multipliers can also be used. The default value is 1.  In case the user does use multiplier of individual items he can apply a multiplier on the list price. This will discount the list price by the function of the multiplier. |
| Recurring |  |  |  | DO we need recurring here |
| List Price |  |  |  | Total of all the item prices without the multiplier. |
| **Tax** |  |  |  | Tax percentage applicable |
| Total |  |  |  | Quote total taking into account any multiplier used. This will be the amount that the customer needs to pay. |

**What is Purchase order (P.O)?**

*A* ***purchase order (PO)*** *is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer. Sending a purchase order to a supplier constitutes a legal offer to buy products or services. Acceptance of a purchase order by a seller usually forms a contract between the buyer and seller, so no contract exists until the purchase order is accepted. It is used to control the purchasing of products and services from external suppliers.*

There are two tabs under the PO tab

**My Request**: Give a list of all the PO’s generated by the company

PO **Form**: used to view existing PO’s and to generate new Quote’s.

**Generating PO Using Quote**

* Under the “Transaction” tab select the PO tab.
* Click the “My Request” tab. It will list the new Quotereceived and their status.
* If the status column is “Generate PO” then a quote has NOT been generated for that Quote.??
* Click on the “Generate PO” link
* This will open the Quote in the “RFQ Form” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, and date field will be grayed out. These fields cannot be change.
* The supplier can also apply a price multiplier for each item. By default the value of the multiplier is 1
* Hit “Send”. This will send the Quote to the buyer

Once the buyers send **PO**the seller is notified in the following ways

* 1. A **PO** is send to the primary email account listed. The seller can view the **PO**and respond to it via email. A pdf copy is also attached with the message is send to the primary email
  2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has a **PO** waiting to be review
  3. The **PO** is also saved in the Buyers list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to **PO** to detail out their terms and conditions for the transaction.

**PO Acknowledgement**

Once the Seller generates a quote it would be send to the buyer for review. The buyer can accept, reject or modify the quote. To respond to the Quote

* Under the “Transaction” tab select the **PO** tab.
* Click the “My Request” tab. It will list the new RFQ received and their status.
* If the status column is “Acknowledge **PO**” then a quote has NOT been acknowledged.
* Click on the “Acknowledge **PO**” link
* This will open the Quote in the “**PO** Form” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, date and price fields will be grayed out. These fields cannot be change.
* Here the buyer can accept the quote or reject it. In case the quote is accepted/rejected a conformation email will be send to the supplier listing the quote has been accepted/rejected
* If the buyer want to modify the quote the buyer can hit the modify button and
* Hit “Send”. This will send the Acknowledgement to the buyer

**Generating a P.O without a Quote**

* Select the P.O from
* Date is today’sdate
* The P.O number is selected automatically
* Buyer’s name will be selected automatically
* The Supplier name can be filled in manually by the supplier or select the supplier from the list by clicking the  button.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* The Price for each item
* Also specify the currency. US dollar is selected by default.
* The buyers can also apply a multiplier either for each item or on the list price of the P.O.
* If what to add an item to the search hit the Add an Item button.
* In case the P.O is recurring
* Hit “Send P.O”

Once the Buyer send the P.O to the Supplier/seller is notified in the following ways

1. A P.O is send to the primary email account listed. The seller can view the P.O and respond to it via email. A pdf copy is also attached with the message is send to the primary email
2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has a quote waiting to be review
3. The P.O is also saved in the Buyer list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to P.O to detail out their terms and conditions for the transaction.

**Generating a P.O to non SupplyMedium members**

* Select the P.O from
* Date is today’sdate
* The P.O number is selected automatically
* Buyer name will be selected automatically
* Check the “Outside Buyer” check box. Clicking this check box will display an email field. This is a mandatory field if a company which is not registered with SupplyMedium needs to be contacted.
* The Supplier name can be filled in manually by the buyers.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* The Price for each item
* Specify the currency. US dollar is selected by default.
* The supplier can also apply a multiplier either for each item or on the list price of the quote.
* If what to add an item to the search hit the Add an Item button.
* In case the quote is recurring
* Hit “Send P.O”

Once the Buyer send the P.O to the Supplier/seller is notified in the following ways

1. A quote is send to the primary email account listed. The seller can view the quote and respond to it via email. A pdf copy is also attached with the message is send to the primary email
2. The P.O is also saved in the Buyer list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to P.O to detail out their terms and conditions for the transaction.

**Note:** The non-registered supplier will be sent an invitation email from SupplyMedium to join the website on the email address provided by the buyer.

**P.O Change**

The buyer will use the Modify P.O option to send only the information (segments) that is pertinent to the change to the original order. The original P.O number and/or line item change being requested will always be sent.

Reasons for P.O Change

Change Orders are issued if:

* + To add or delete an item or items on a Purchase Order.
  + To change the ending dates on a blanket order.
  + To change the description of an item(s).
  + To change price(s) and/or item(s) if the order total changes by $100 or more.
  + Per vendor request with consultation of the user department.
  + To change an order to/from positive approval (to approve invoices prior to payment).

To change P.O the……… uses the P.O modify button. The fields that can be modified are

* Item description
* Part#
* Quantity
* Date
* Price
* Multiplier
* Or an item can be added to the P.O

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Command** | **Status** | **Max/Min** | **Type** | **Description** |
| Date | M | 8/8 |  | Date P.O is issued |
| P.O Number | M | 1/22 |  | Identifying number for Purchase Order assigned by the buyer/purchaser. The number is used to approve, track and process purchased items.  This number will start with the prefix PO and have numbers same as that for the Quote. |
| Outside Supplier |  |  |  | In case the outside supplier is checked the user can generate P.O to a company/organization that is not registered with SupplyMedium. If this box is checked an email box will appear. Filling this email box with a valid email address is mandatory for such P.O. |
| **Buyers name** | M | 1/60 |  | Buyers name |
| Suppliers Name | M | 1/60 |  | Supplier name |
| Address |  | 1/55 |  | Address information |
| City |  | 2/30 |  | Free-form text for city name |
| State |  | 2/2 |  | Code (Standard State/Province) as defined by appropriate government agency |
| Zip |  | 3/15 |  | Code defining international postal zone code excluding punctuation and blanks (zip code for United States) |
| Country/Region |  | 2/3 |  | Code identifying the country. U.S is selected by default. |
| Item Name | M | 1/80 |  | **The Item Name** is a name, especially one legally registered as a trademark, used by a manufacturer or merchant to identify its products distinctively from others of the same type and usually prominently displayed on its goods, in advertising, etc. |
| Part# | O |  |  | A combination of numbers, letters, and symbols assigned by a designer, a manufacturer, or vendor to identify a specific part or item of materiel. |
| Quantity | M | 1/15 |  | Specified number or amount items. |
| Date | M | 8/8 |  | Specifies the date on which the item is needed. |
| Price | M | 1/17 |  | Item price |
| Currency | M |  |  | Currency used for the quote |
| **Multiplier** |  |  |  | The user has the ability to apply a multiplier for each item. The multiplier is used to discount the price of an item. For example consider that the price of an item is $100. In case a multiplier of 0.6 is used then the price will be reduced to $60. Typically the range is 0.1 to 1 however; higher multipliers can also be used. The default value is 1.  In case the user does use multiplier of individual items he can apply a multiplier on the list price. This will discount the list price by the function of the multiplier. |
| Recurring |  |  |  | By checking recurring the customer can schedule automatic P.O to be issued at specific interval. |
| P.O SUBTOTAL |  |  |  | Total of all the item prices without the multiplier. |
| Taxable amount |  |  |  | Total amount of taxes |
| **Tax at 0.00%** |  |  |  | Tax percentage applicable |
| P.O Total |  |  |  | P.O total taking into account any multiplier used. This will be the amount that the customer needs to pay. |
| Term & Condition |  |  |  | When the user clicks this link a pop up window will appear. Here the user can copy and paste their company’s P.O term and conditions. |

**What is Invoice?**

*An* ***invoice*** *or* ***bill*** *is a commercial document issued by a seller to the buyer, indicating the products, quantities, and agreed prices for products or services the seller has provided the buyer. An invoice indicates the sale transaction only. Payment terms are independent of the invoice and are negotiated by the buyer and the seller. Payment terms are usually included on the invoice. The buyer could have already paid for the products or services listed on the invoice. Buyer can also have a maximum number of days in which to pay for these goods and is sometimes offered a discount if paid before the due date.*

There are two tabs under the PO tab

**My Request**: Give a list of all the Invoice’s generated by the company

**Invoice Form**: used to view existing Invoice’s and to generate new Invoice’s.

**Generating PO Using Quote**

* Under the “Transaction” tab select the Invoice tab.
* Click the “My Request” tab. It will list the new POreceived and their status.
* If the status column is “Generate Invoice” then a quote has NOT been generated for that PO.
* Click on the “Generate Invoice” link
* This will open the Invoice in the “Invoice Form” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, and date field will be grayed out. These fields cannot be change.
* The supplier can also apply a price multiplier for each item. By default the value of the multiplier is 1
* Hit “Send”. This will send the Quote to the buyer

Once the buyers send Invoicethe seller is notified in the following ways

* 1. AnInvoice is send to the primary email account listed. The seller can view the Invoiceand respond to it via email. A pdf copy is also attached with the message is send to the primary email
  2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has anInvoice waiting to be review
  3. The Invoice is also saved in the Buyers list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the buyer can add to Invoice to detail out their terms and conditions for the transaction.

Invoice **Acknowledgement**

Once the Seller generates a quote it would be send to the buyer for review. The buyer can accept, reject or modify the quote. To respond to the Quote

* Under the “Transaction” tab select the Invoice tab.
* Click the “My Request” tab. It will list the new Invoicereceived and their status.
* If the status column is “Acknowledge Invoice” then a quote has NOT been acknowledged.
* Click on the “Acknowledge Invoice” link
* This will open the Quote in the “Invoice Form” page.
* Buyers name, Supplier name, Item name, Part number (if applicable), quantity, date and price fields will be grayed out. These fields cannot be change.
* Here the buyer can accept the quote or reject it. In case the Invoice is accepted/rejected a conformation email will be send to the supplier listing the Invoice has been accepted/rejected
* If the buyer want to modify the Invoice the buyer can hit the modify button and
* Hit “Send”. This will send the Acknowledgement to the buyer

**Generating anInvoice without a P.O**

* Select the invoice from
* Date is today’sdate
* The invoice number is selected automatically
* Seller name will be selected automatically
* The Buyers name can be filled in manually by the supplier or select the buyer from the list by clicking the  button.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* The Price for each item
* Also specify the currency. US dollar is selected by default.
* If what to add an item to the search hit the Add an Item button.
* In case the Invoice is recurring
* Hit “Send invoice”

Once the Seller send the Invoice to the Buyer is notified in the following ways

1. An Invoice is send to the primary email account listed. The Buyer can view the Invoice and respond to it via email. A pdf copy is also attached with the message is send to the primary email
2. In the page of the person who have the privileges to view the message an alert is displayed that indicate that he has a quote waiting to be review
3. The Invoice is also saved in the Seller list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the seller can add to Invoice to detail out their terms and conditions for the transaction.

**Generating an Invoice to non SupplyMedium members**

* Select the Invoice from
* Date is today’sdate
* The Invoice number is selected automatically
* Supplier name will be selected automatically
* Check the “Outside Supplier” check box. Clicking this check box will display an email field. This is a mandatory field if a company which is not registered with SupplyMedium needs to be contacted.
* The Byers name can be filled in manually by the Suppliers.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* The Price for each item
* Specify the currency. US dollar is selected by default.
* The supplier can also apply a multiplier either for each item or on the list price of the quote.
* If what to add an item to the search hit the Add an Item button.
* In case the quote is recurring
* Hit “Send Invoice”

Once the Seller send the Invoice to the Buyer is notified in the following ways

1. An Invoice is send to the primary email account listed. The Buyer can view the Invoice and respond to it via email. A pdf copy is also attached with the message is send to the primary email
2. The Invoice is also saved in the Seller list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the seller can add to Invoice to detail out their terms and conditions for the transaction.

**Note:** The non-registered supplier will be sent an invitation email from SupplyMedium to join the website on the email address provided by the buyer.

**Generating an Invoice without a P.O**

* Select the Invoice from
* Date is today’sdate
* The Invoice number is selected automatically
* Supplier name will be selected automatically
* Check the “Non P.O Invoice” check box. There are two options
  + In case the buyers is a member of SupplyMedium the Buyers name can be filled in manually by the supplier or select the supplier from the list by clicking the  button.
  + In case the buyer is a not a member of SupplyMedium Clicking this check box will display an email field. This is a mandatory field if a company which is not registered with SupplyMedium needs to be contacted.
* The Byers name can be filled in manually by the Supplier.
* Specify the Item name
* Give the part number for that item. This field is optional
* Specify the quantity needed
* Specify the number of units needed
* Specify the date when the item are needed
* The Price for each item
* Specify the currency. US dollar is selected by default.
* The supplier can also apply a multiplier either for each item or on the list price of the quote.
* If what to add an item to the search hit the Add an Item button.
* In case the quote is recurring
* Hit “Send Invoice”

Once the Seller send the Invoice to the Buyer is notified in the following ways

1. An Invoice is send to the primary email account listed. The Buyer can view the Invoice and respond to it via email. A pdf copy is also attached with the message is send to the primary email
2. The Invoice is also saved in the Seller list column under the name of that customer.

**Note:** Terms & Conditions is a clickable attachment that the seller can add to Invoice to detail out their terms and conditions for the transaction.

**Note:** The non-registered supplier will be sent an invitation email from SupplyMedium to join the website on the email address provided by the buyer.

**Acknowledge Invoice**

When the Buyer receives the invoice he can accept, reject or modify the invoice. In case the invoice is accepted/rejected the Seller will receive acknowledgement that he invoice has been accepted/rejected by the buyers. In case the invoice is accepted it is saved as a .pdf and an xml file in the transaction history of the company.

In case the buyer rejects an invoice he must specify the reasons for rejection. The list of reasons for which an invoice can be rejected are given below.

* **Purchase Order number consists of invalid values** – The purchase order number is incorrect. It could be missing, contain all zeros or contain alpha characters.
* **Amount invoiced as zero**
* **Invoice amount does not total detail amount** – The line items do not add up to total.
* **Invoice number not provided**
* **Date shipped not a valid date** –It could be an invalid date or a date before the purchase order date.
* **Duplicate vendor/invoice from vendor** – We have received this invoice number before. Invoice numbers cannot be recycled for 24 months. You will need to change the invoice number and retransmit.
* **Invoice has been set to pay** – The invoice has previously been received and accepted by payables. It is in the system for payment and should be paid accordingly.
* **Invoice previously paid** – Company has received and paid an invoice with the same invoice number in the past 24 months for your company. If you feel you have received this message in error, you will need to verify the invoice number.

**Invoice Change**

The buyer will use the Modify invoice option to send only the information (segments) that is pertinent to the change to the original order. The original invoice number and/or line item change being requested will always be sent.

**Reasons for Invoice Change**

Change Orders are issued if:

To change Invoice the……… uses the Invoice modify button. The fields that can be modified are

* Quantity
* Date
* Price

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Fields** | **Status** | **Max/Min** | **Type** | **Description** |
| Date | M | 8/8 |  | Date Invoice is issued |
| Invoice# | M | 1/22 |  | A unique identification value assigned to a transaction by a merchant, which may be associated with order fulfillment and billing for a transaction. The number is used to approve, track and process invoiced items.  This number will start with the prefix I and have numbers same as that for the P.O |
| Invoice Payment Due Date | M | 8/8 |  | Specifies the date on which invoice payment is due. |
| **P.O Number** | O | 1/22 |  | Identifying number for Purchase Order assigned by the buyer/purchaser. The number is used to approve, track and process purchased items.  This number will start with the prefix PO and have numbers same as that for the Quote. |
| Non P.O Invoice | - | - |  | In case the Non P.O Invoice is checked the user can generate invoice to a company/organization that is either not registered with SupplyMedium or for which no P.O exists. If this box is checked an email box will appear. Filling this email box with a valid email address is mandatory for such invoices. |
| Outside Supplier | - | - |  | In case the outside supplier is checked the user can generate quote to a company/organization that is not registered with SupplyMedium. If this box is checked an email box will appear. Filling this email box with a valid email address is mandatory for such quotes. |
| **Please Remit To** | M | 1/60 |  | Supplier name |
| Sold To | M | 1/60 |  | Buyers name |
| Address |  | 1/55 |  | Address information |
| City |  | 2/30 |  | Free-form text for city name |
| State |  | 2/2 |  | Code (Standard State/Province) as defined by appropriate government agency |
| Zip |  | 3/15 |  | Code defining international postal zone code excluding punctuation and blanks (zip code for United States) |
| Country/Region | M | 2/3 |  | Code identifying the country. U.S is selected by default. |
| Item Name | M | 1/80 |  | **The Item Name** is a name, especially one legally registered as a trademark, used by a manufacturer or merchant to identify its products distinctively from others of the same type and usually prominently displayed on its goods, in advertising, etc. |
| Part# | O |  |  | A combination of numbers, letters, and symbols assigned by a designer, a manufacturer, or vendor to identify a specific part or item of materiel. |
| Quantity | M | 1/15 |  | Specified number or amount items. |
| Quantity Ordered | M | 8/8 |  | Total quantity ordered |
| Quantity Shipped | M | 1/15 |  | Total quantity shipped |
| Price | M | 1/17 |  | Item price |
| Currency |  |  |  | Currency used for the quote |
| **SUBTOTAL** |  |  |  | Total of all the item prices without the multiplier. |
| Sales tax |  |  |  | Sales Tax percentage applicable |
| Freight & Handling |  |  |  | Freight & Handling charges |
| Amount Due |  |  |  | Amount Due |
| **Carrier** |  |  |  | Freight company |
| BILL\_OF\_LANDING |  |  |  | Bill of Lading is the official document prepared by the carrier duly accepting the goods for shipment containing information like item, quantity, value, vessel details, date, port, consigner, consignee etc. Bill of lading is a contract to carry the goods to the said destination based on which seller can claim consideration and buyer can take delivery of the goods. |
| Freight Weight |  |  |  | Weight of the freight |
| Units |  |  |  | Specified number or amount items. |
| Date Shipped | M | 8/8 |  | Date items are shipped |
| Term & Conditions |  |  |  | When the user clicks this link a pop up window will appear. Here the user can copy and paste their company’s Invoice term and conditions. |

**Social Features**

**Newsroom  
Dashboard**

**Messages**

Who can I send messages to?

Send a message?

Adding Attachment to a message

**Notifications**

**Events**

**Groups**

**Chat**

To add someone in Chat

How do I see a contact is available on chat?

Close Chat Window?

**Rate Buyer/Supplier**

To Rate a Transaction:

How Ratings are calculated

**Dashboard**

SupplyMedium dashboard is an easy to read, real-time graphical user interface, that allows companies to view their financial health and other aspects like, inventory, sales, revenue etc., to help them make better informed decisions.

SupplyMedium, presently, provides two kinds of graphs

1. Pie chart
2. Bar chart

The user has the ability to generate monthly and yearly reports. The information is displayed as pie chart or a bar graph

**Messages**

**Who can I send messages to?**

You can send messages to anyone on SupplyMedium. However you must be connected to person before you can send them a message.

**Send a message?**

To send a message:

1. Go to the message tab under Home.
2. Select the person you want to message.
3. Type your message and click **Send**.

When you send someone a message, it gets delivered to their messages inbox and they will receive a notification. Once the person views your message, it will be marked as seen.

**Adding Attachment to a message**

To add a file to your message:

1. Click
2. Hit add
3. Type **Enter** to send

**Notifications**

Notifications appear at the top-right corner of any page on SupplyMedium. When you have a new notification, a red bubble will appear over the https://fbcdn-dragon-a.akamaihd.net/hphotos-ak-xpa1/t39.2365-6/10173498_626362270772068_1042789434_n.pngglobe icon with the number of new notifications you've received. Click these icons at any time to view or adjust new notifications.



When a company sends you an RFQ, you'll see the number **1** above the https://fbcdn-dragon-a.akamaihd.net/hphotos-ak-xpa1/t39.2365-6/10173498_626362270772068_1042789434_n.pngglobe icon. Click the icon to respond to the RFQ.

You can also see your messages under the message tab.

**Events**

* This is similar to Facebook style too that allows user to create an event alert for any task

**Groups**

* This is similar to Facebook style too that allows user to create a Group

**Chat**

SupplyMedium chat allows users to chat with any other user using the SupplyMedium platform.

SupplyMedium Chat bar appears at the bottom of your browser—no installation or assembly required. From this bar you can view your list of online contacts and open conversations with any of them.

**To add someone in Chat**

**How do I see a contact is available on chat?**

Find your contact name in the chat window:

* Contacts with a https://fbcdn-dragon-a.akamaihd.net/hphotos-ak-xpa1/t39.2365-6/851563_502360806502381_734543508_n.pngnext to their names are on chat.
* Contacts with no icon next to their names are off chat.

**Close Chat Window?**

* To minimize a chat so you can easily access it later, click the top of the chat window. To reopen a minimized chat, just click the collapsed tab at the bottom of your screen
* To close a chat, click the **x** in the top-right corner of the window or press the Escape (esc) key on your keyboard.

**Rate Buyer/Supplier**

Each time you make a transaction, you have an opportunity to leave Feedback about your experience. That Feedback is an essential part of what makes SupplyMedium a successful community.

Feedback consists of a 5 star rating, along with a short comment. Buyers and sellers build reputations that are based on all the Feedback ratings and comments left by their trading partners.

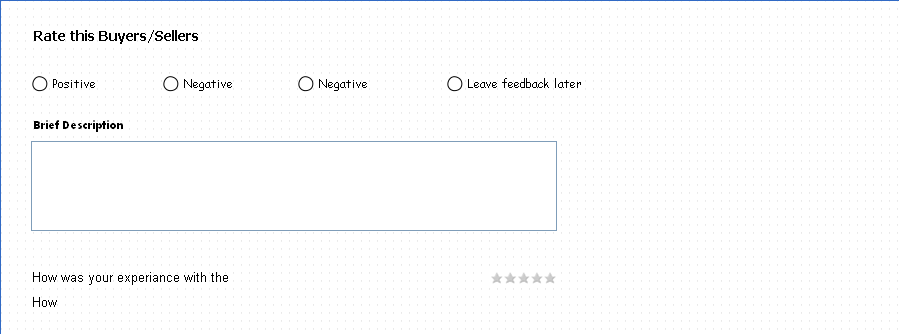
This information is available in each member's Feedback Profile, and helps prospective trading partners buy and sell with confidence.

**To Rate a Transaction:**

1. Click the Rating tab
2. Select the customer.
3. Click the stars to rate your overall experience as 1 to 5 stars, 1 being dissatisfied and 5 being very satisfied.
4. After you leave an overall rating, you can add a descriptive comment
5. Press OK

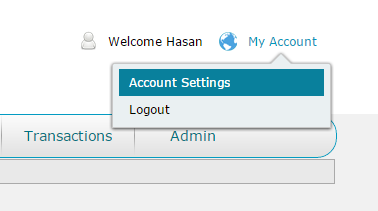
**How Ratings are calculated**

* 1. SupplyMedium rating system is based on a 1- to 5-star scale. 5 stars is the highest rating, and 1 star is the lowest.
  2. The rating of that buyer/seller is than averaged out over all the rating they have received.



**User Account Settings**

The account setting lets user to …………………………….



This interface will be used by individual user to

* Upload picture
* Change password,
* Settings user notifications
* Working Hours settings
* User Details

**Upload picture**

User can upload a picture by going to the Upload picture section in the account setting page and clicking on the browse button. In the popup window browse to the file location and select the file and Click Open. The file will be visible in the Upload picture screen. The picture will also be displayed on the upper right corner of the screen

**ResetsPassword**

The user can change his password. To change your password go to the Reset Password section in the account setting page and enter the current passwords and then enter the new password twice. When completed Hit Save. The password will be changed.

Note: Password change will take effect on the next login

**Notification Settings**

This screen is used to enter an email address and/or a Mobile number to which notifications will be sent. Email and mobile messages can be sent in Rich Text or Plain Text formats using templates. Scheduling and editing of notifications can also be performed at this screen. To set notification

* Enter the email address and or the mobile number in the email/mobile address box. Checking “Use registered email address to send notifications” will populate the email address box with the default email for the account.
* To get notifications from 9am to 5pm check the “During Working Hours” and indicate the method of notification, email or mobile
* To get after hours notifications, 5pm to 9 am, check Outside Working Hours and indicate the method of notification, email or mobile
* To stop notifications between a certain hours check “Stop All Notification Between” and select time
* To select a specific day of the week and select the day and specify the time you need to get the notifications

**Working Hours settings**

The user also has the ability to set his working hours. Once you set your working hours the notifications will be driven by the time you set. For example you set the working hours between 9 to 5 Monday through Friday and select to get notifications during business hours you will get notification during the business hours that you selected.

**User Details**

User details page give the user ability to view his profile and change some information. Not all the sections are editable by the user

The complete list of Department privilege with explanation of each privilege is given in the table below

|  |  |  |
| --- | --- | --- |
| **User Fields** | Editable | Description |
| Country | No | Name of country where the user is located |
| Company | No | The Company/Organization name. |
| First Name | Yes | Users first name |
| Last Name | Yes | User last name |
| Address | Yes | Users physical Address |
| City | Yes | User city name |
| State/Province | No?? | Users State or Province of residence. |
| Zip Code/Postal Code | Yes | User postal or zip code |
| Email | Yes | Users email |
| Department | No | Users Department |
| Manager/Supervisor | No | The person in the organization the user reports to |
| Phone | No | Primary Phone Number associated with the account |
| Cell | Yes | Cell phone Number |
| Fax | Yes | Fax Number |