ZYCUS™

# Zycus Supplier Network User Guide

## Green

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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.


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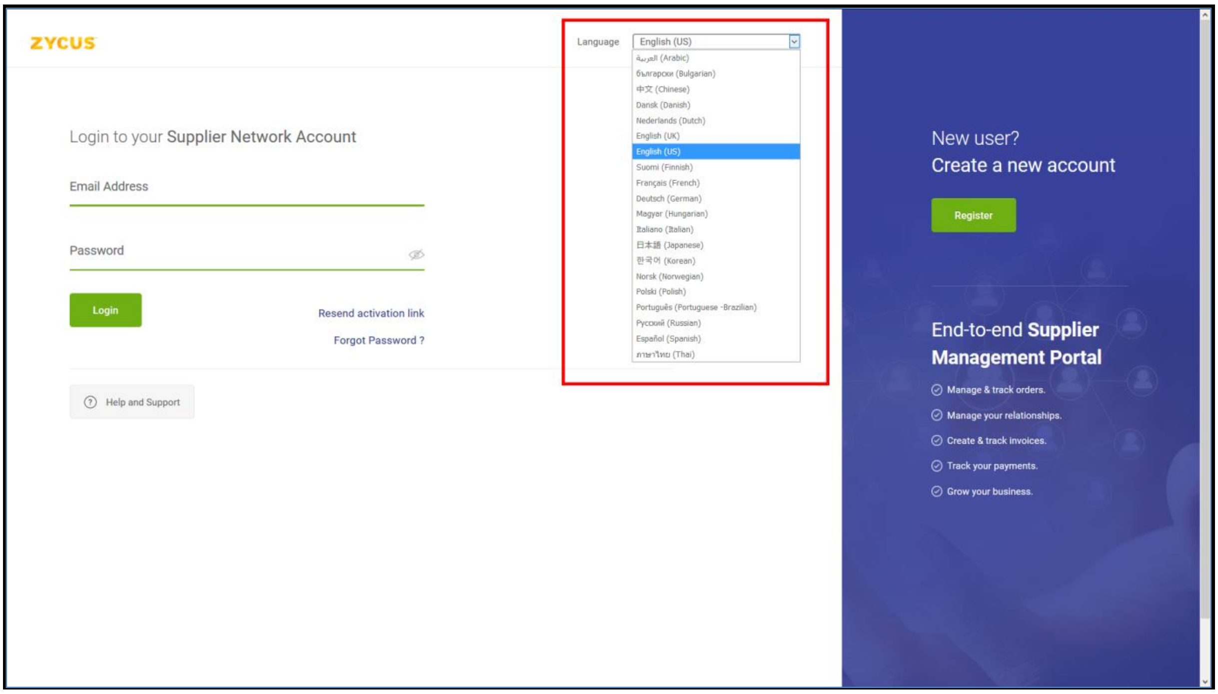
## 1.3 User Interface Language Support

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

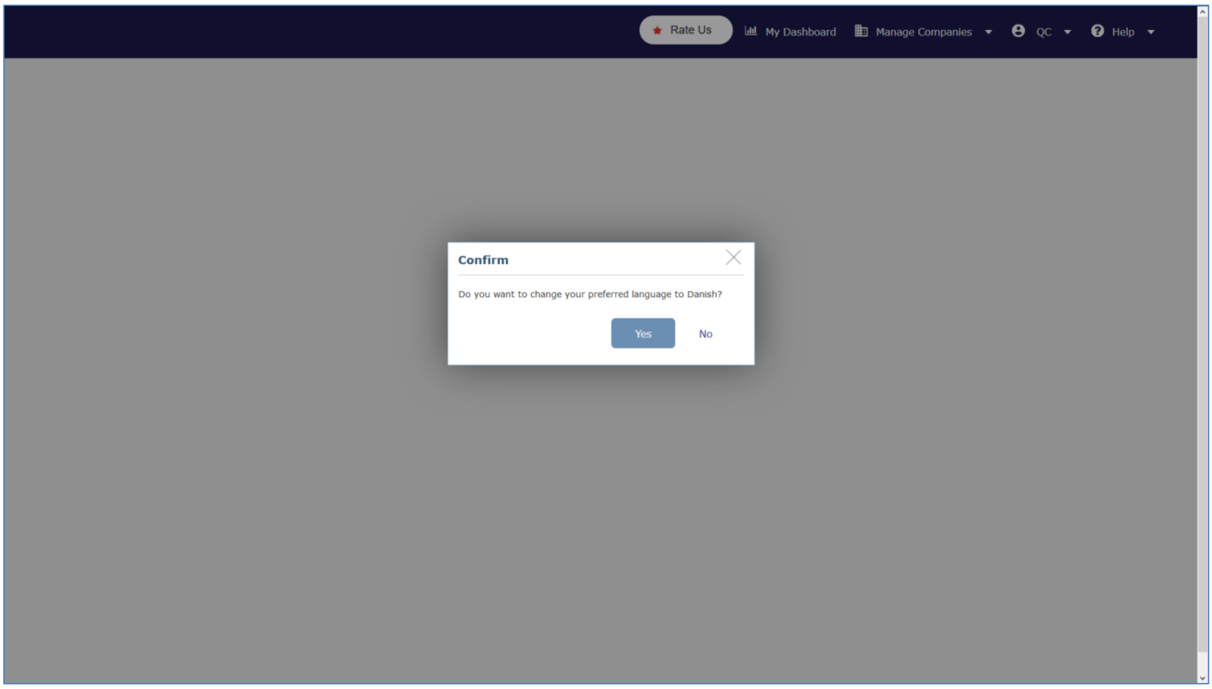
- български (Bulgarian)
- 中文 (Chinese)
- Dansk (Danish)
- English (UK)
- English (US)
- Suomeksi (Finnish)
- Français (French)
- Deutsch (German)
- Magyar (Hungarian)
- Italiano (Italian)
- 한글자모 (Korean)
- Norsk (Norwagian)
- Polski (Polish)
- Русский (Russian)
- Español (Spanish)
- Nederlands (Dutch)
- 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**.

## 1.3.2 Multi-Lingual 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:

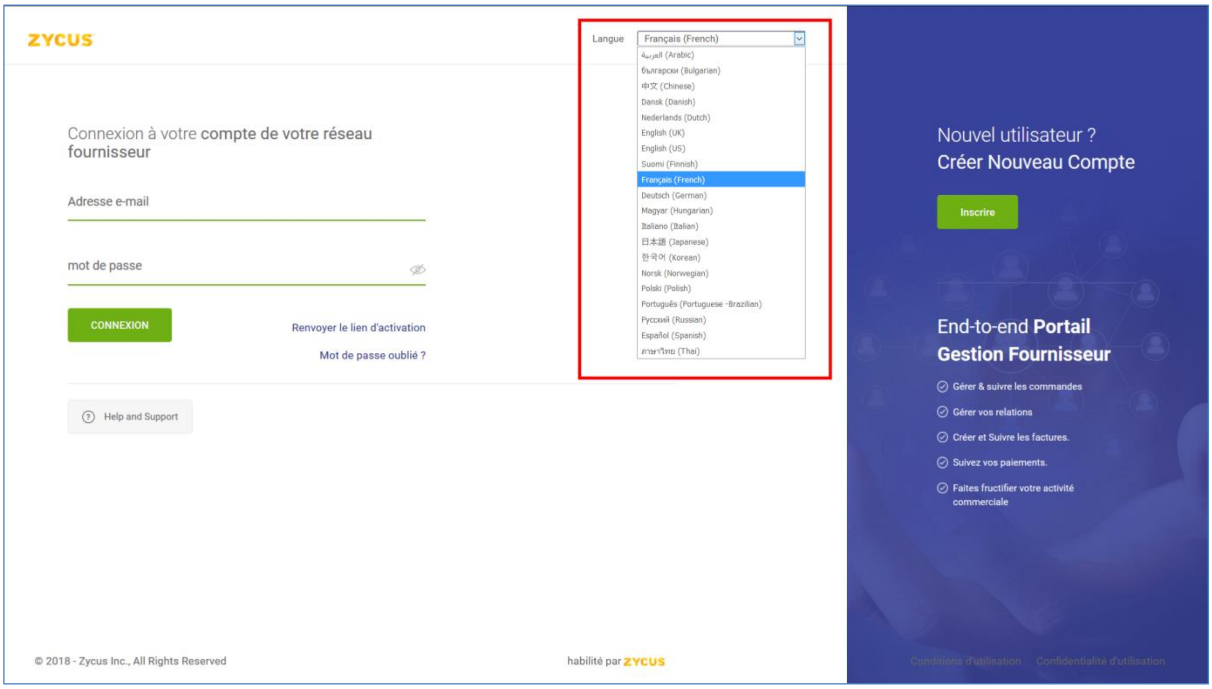
1. Chinese (Simplified)
2. German
3. Japanese
4. Portuguese (Brazil)
5. Spanish
6. Dutch
7. Russian
8. French

### *1.3.2.1 Accessing 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**.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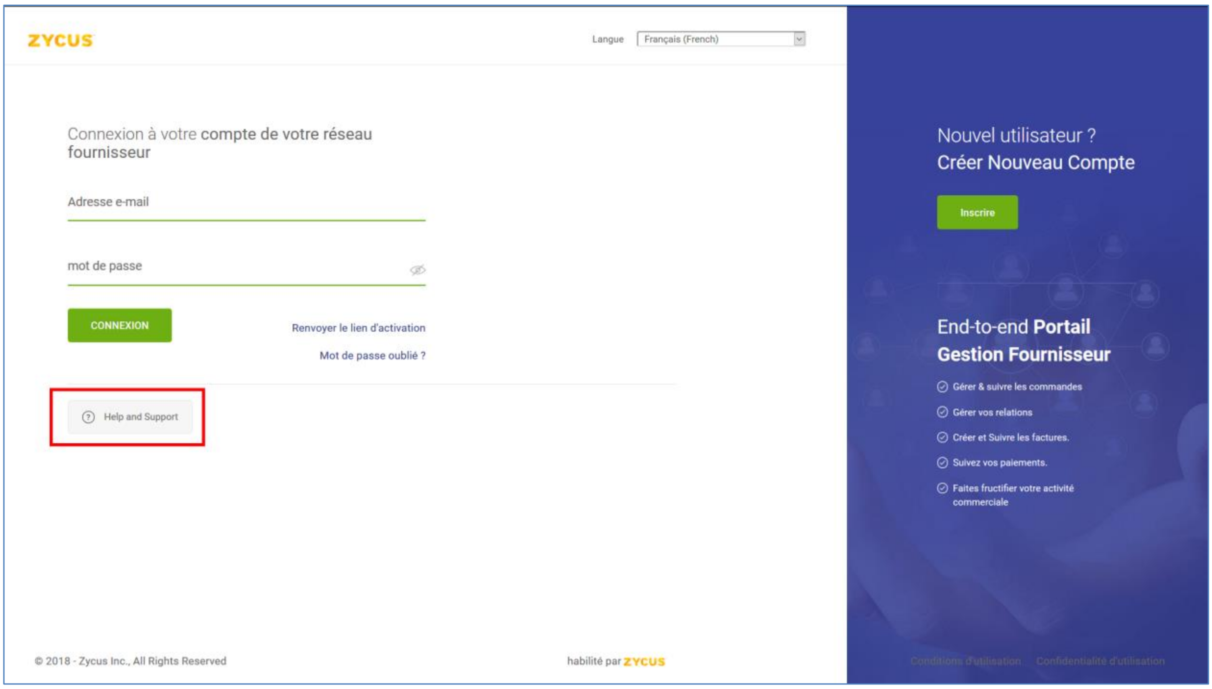
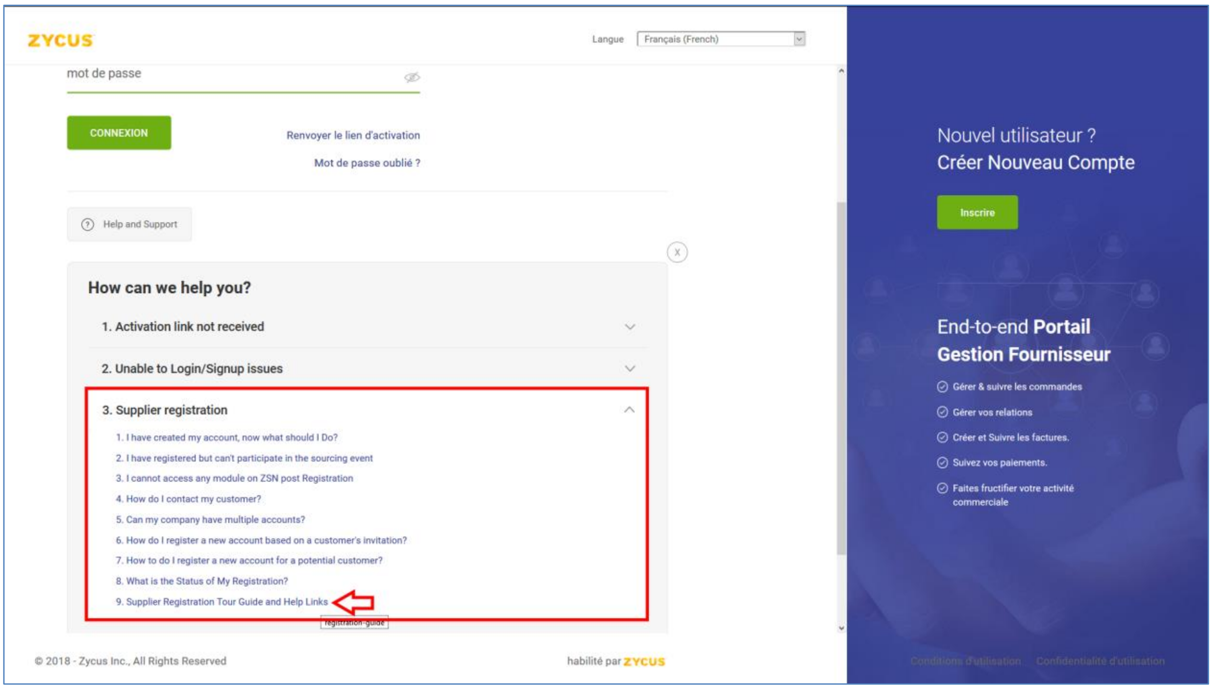



3. Navigate to the section of **Supplier Registration** and click the option **Supplier Registration Tour Guide and Help Links**.



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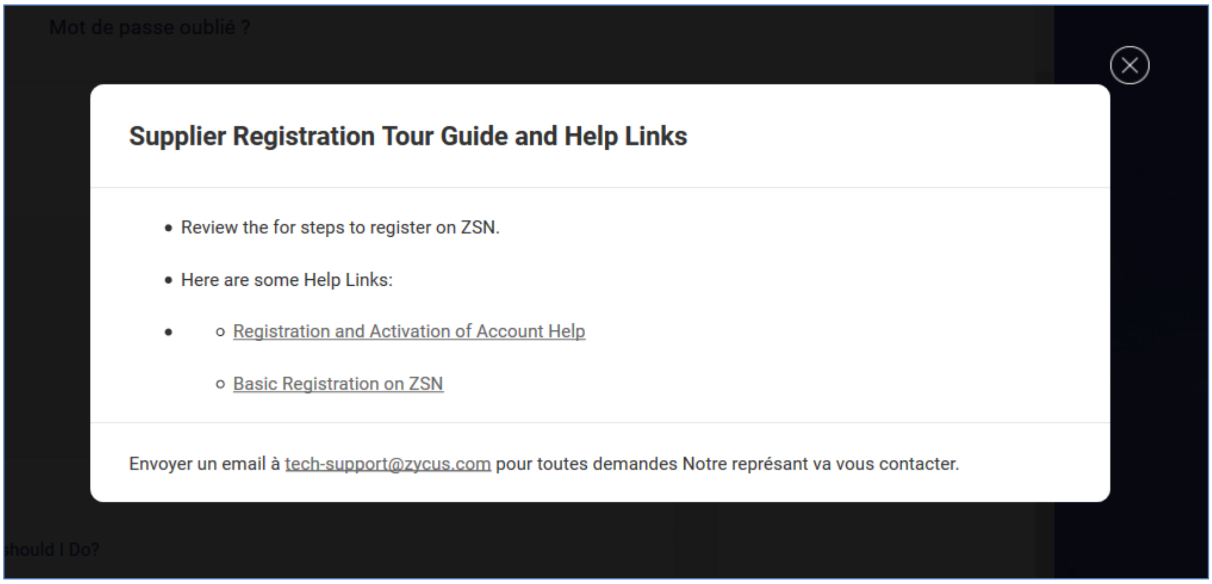
4. A popup will appear as shown below:



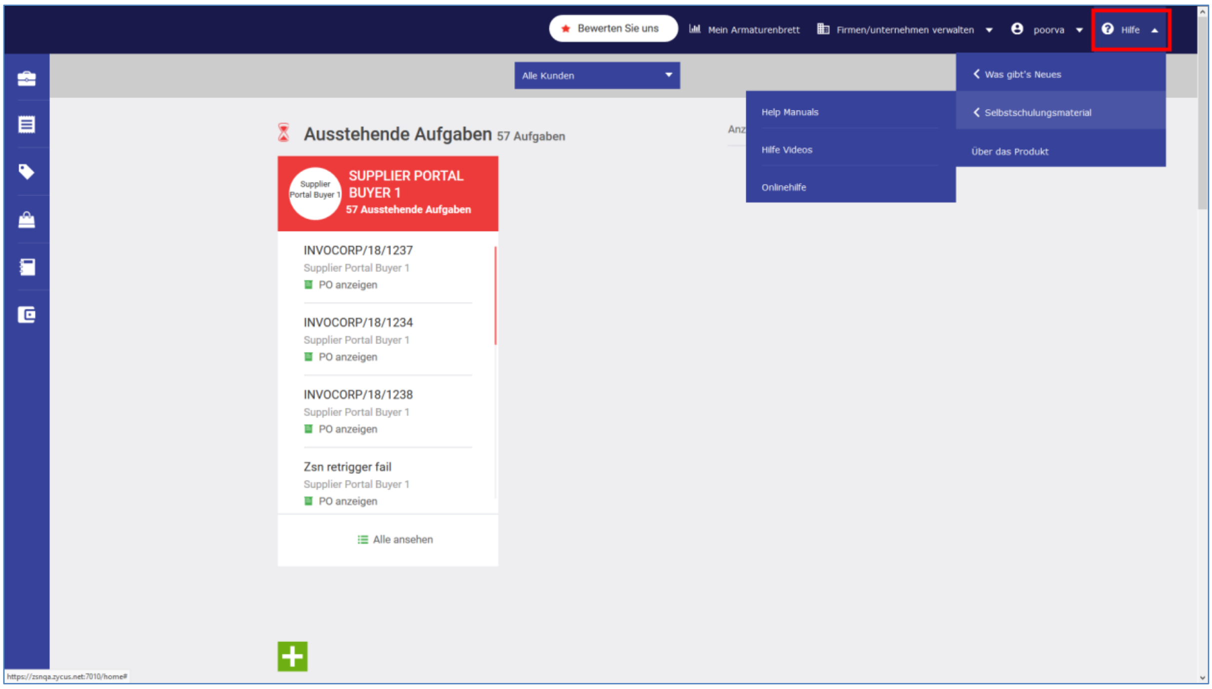

5. Click the link to download the guides.

### *1.3.2.2 Accessing ZSN User Manuals*

To access ZSN help manuals in the following 8 languages:

- Chinese (Simplified)
- German
- Japanese
- Portuguese (Brazil)
- Spanish
- Dutch
- Russian
- French

1. Change the locale of your account 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.

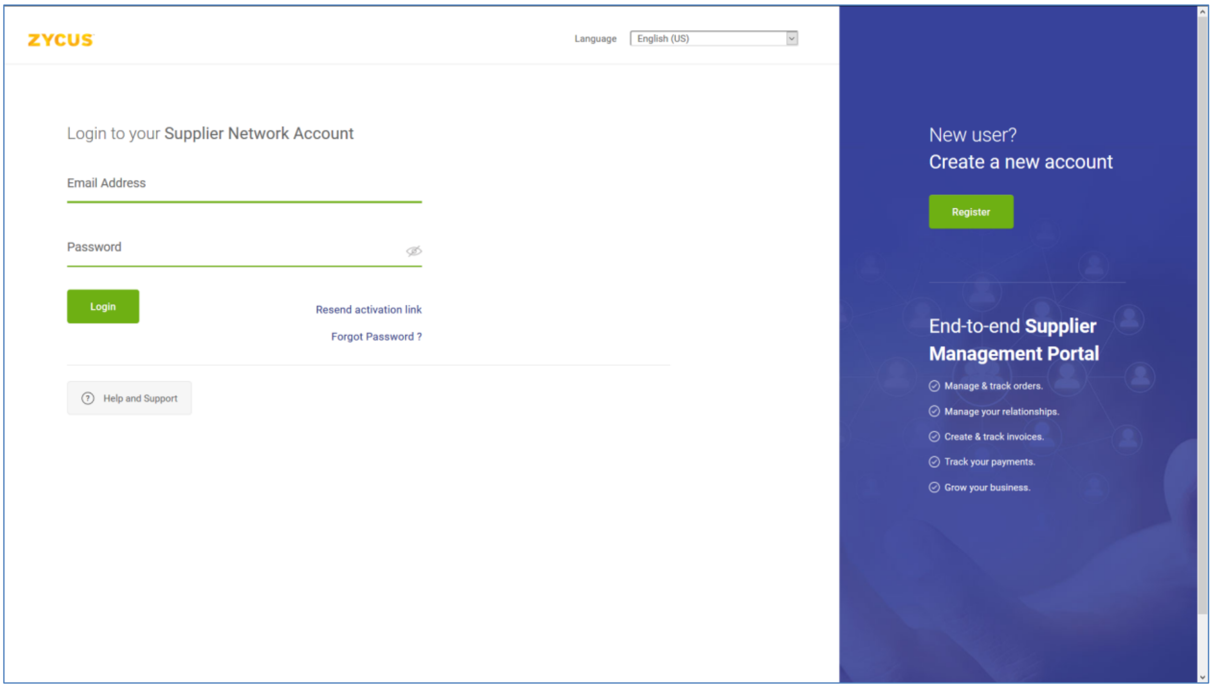



**Note:** Above screenshot is an example for German (Germany) locale.

# 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:




2. Click **Go** to continue.

**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

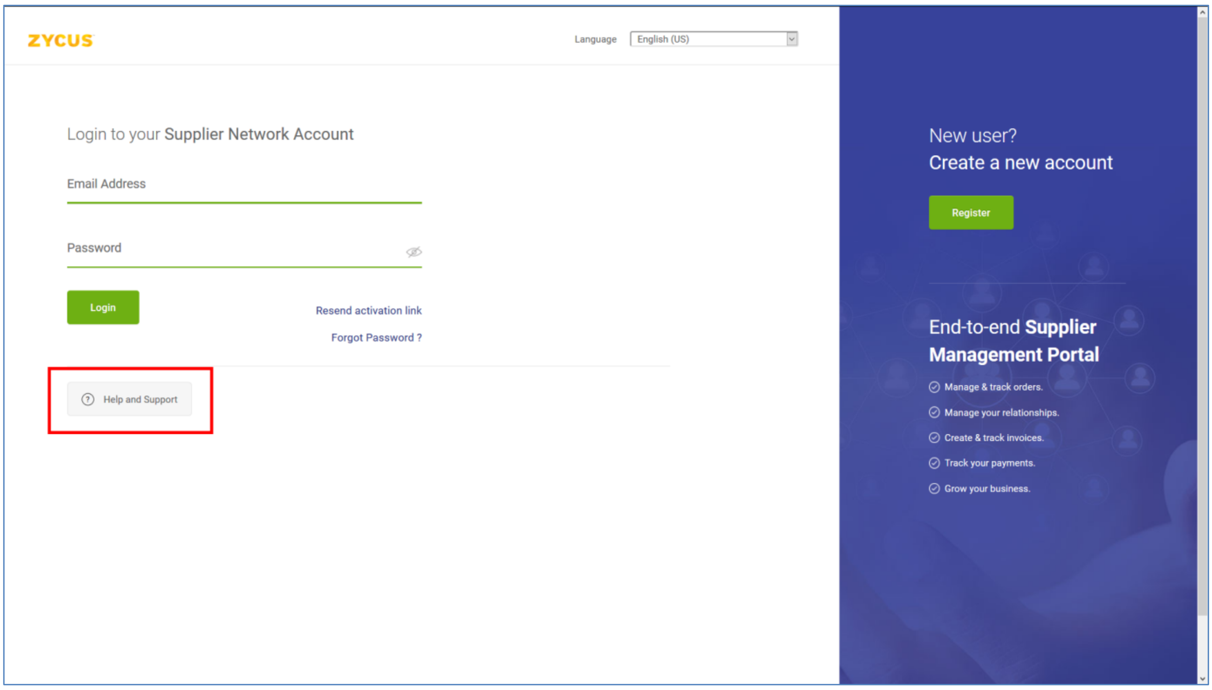
Safari support on Mac 8 or 8+ version

Safari support On Windows 7 0r 7+ version

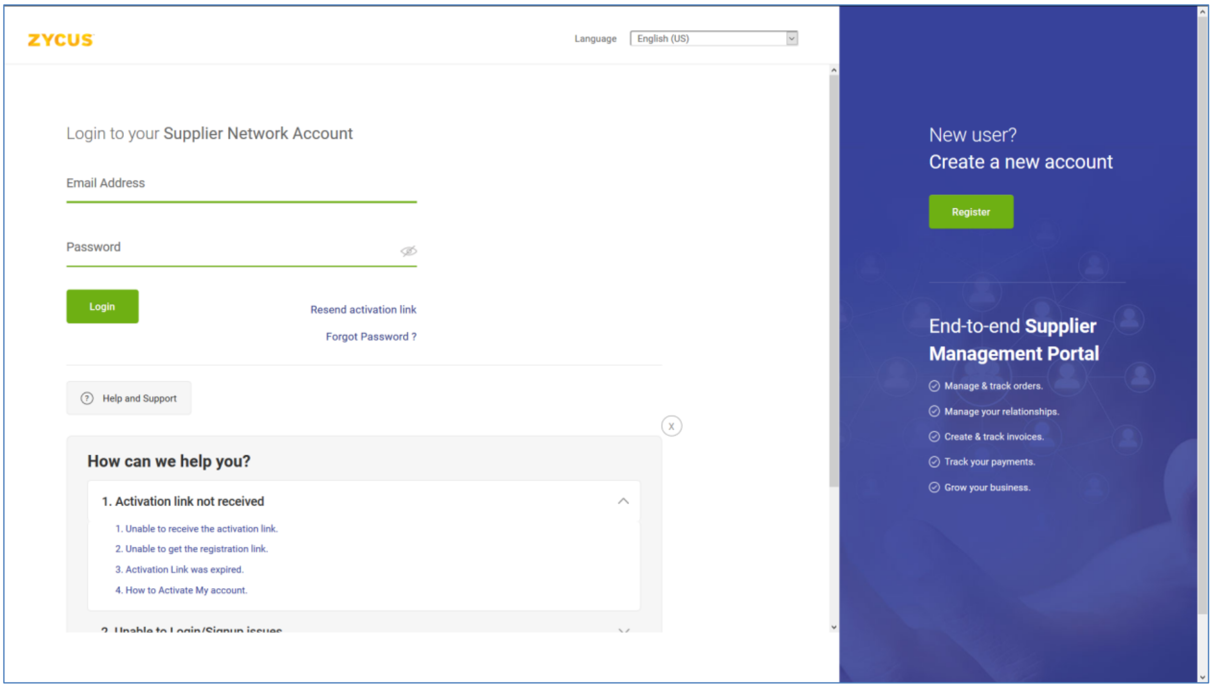
Internet Explorer support 10 or 10+ version

## 2.1 Help and Support

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



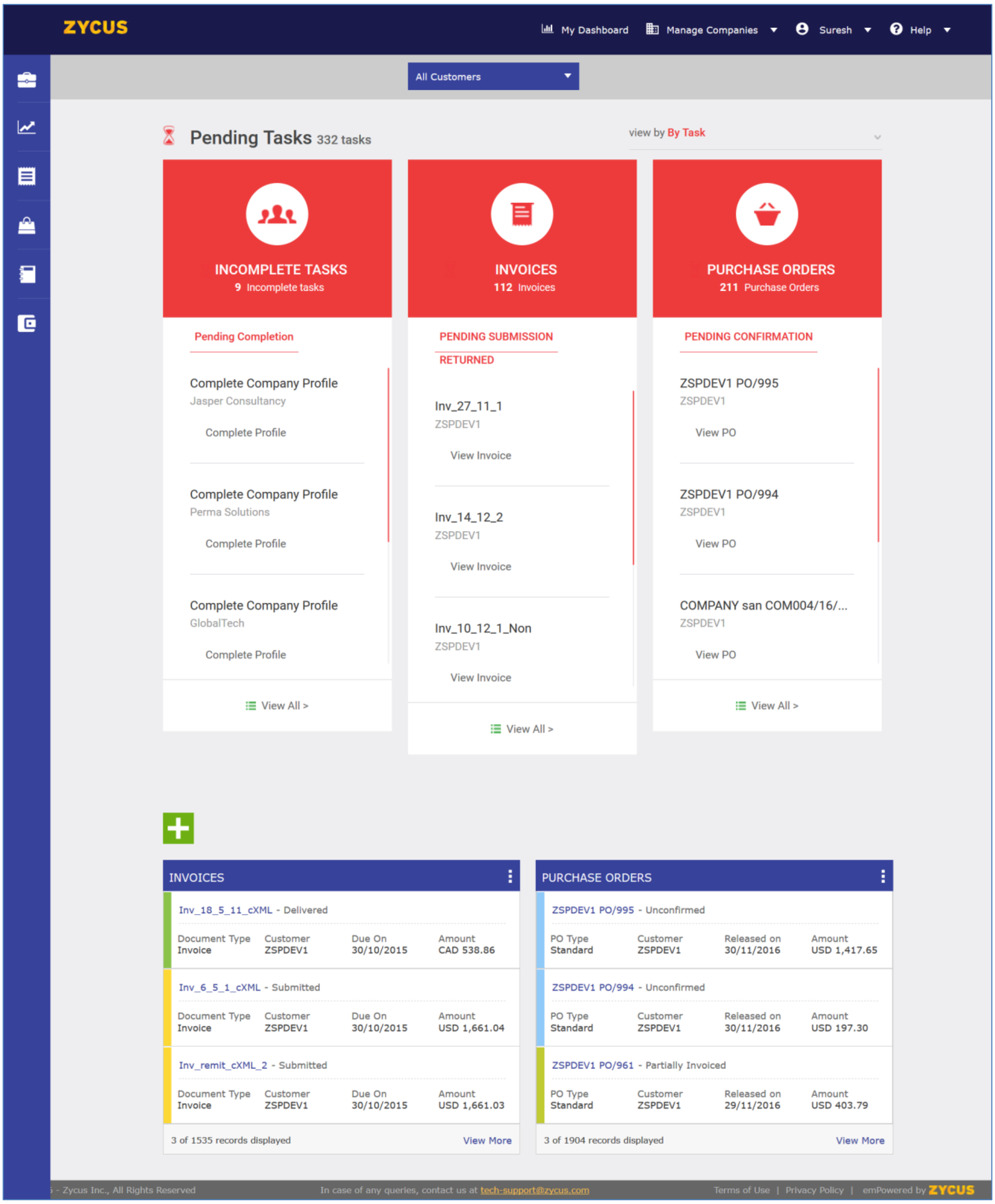

2. Click the Help and Support button to view frequently asked questions. The help section will collapse as shown in the image below:




3. Navigate through the sections to find relevant help.

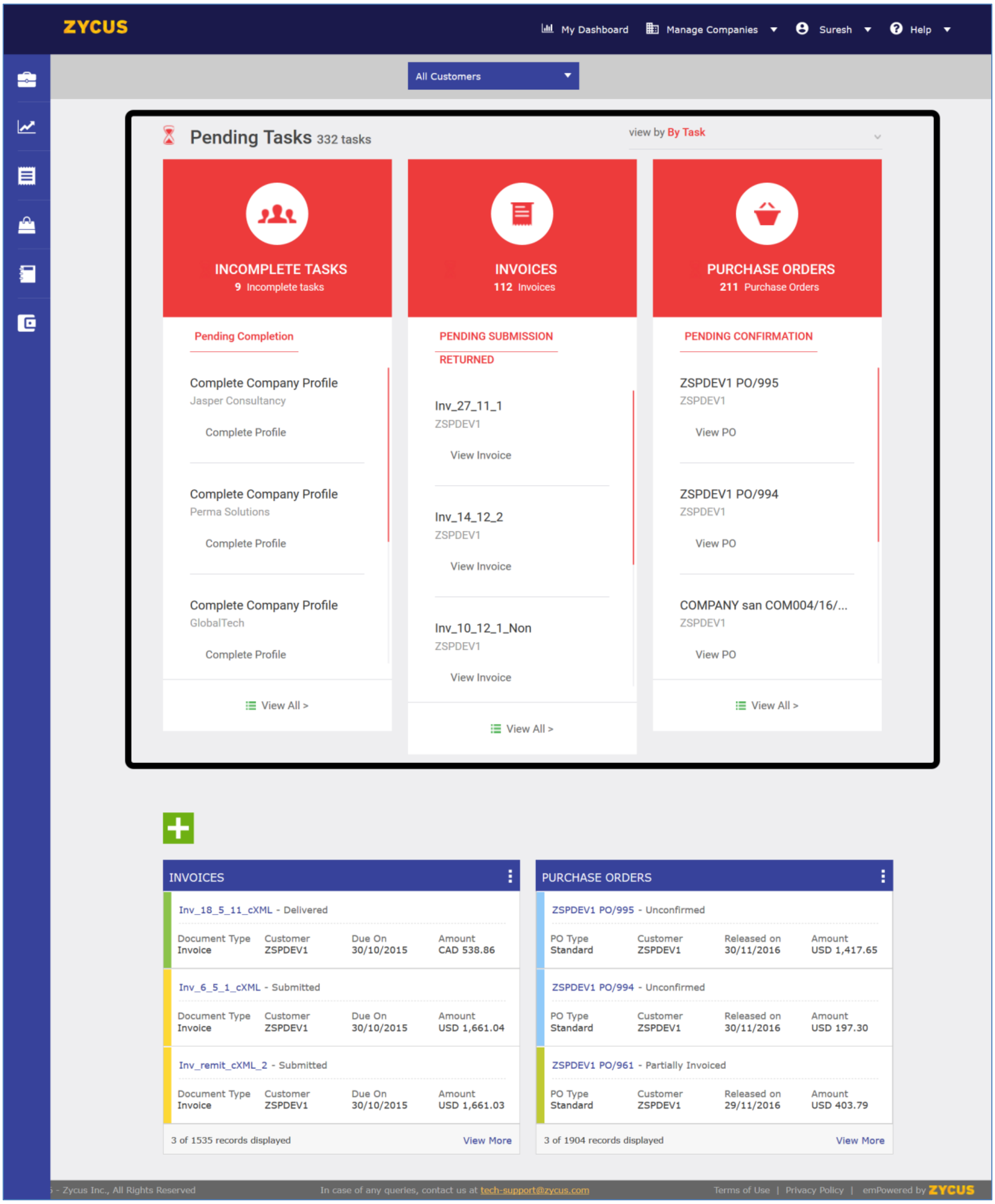
# Chapter 3: Zycus Supplier Network Homepage

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.

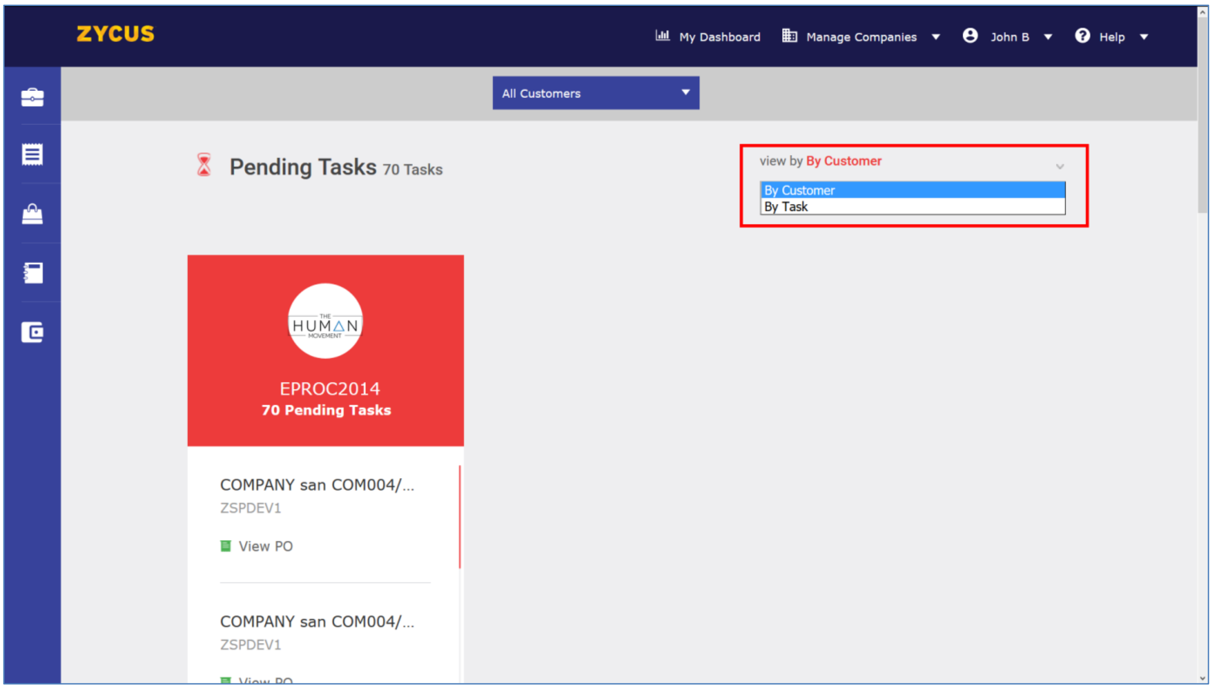


## 3.1 Pending Tasks

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.

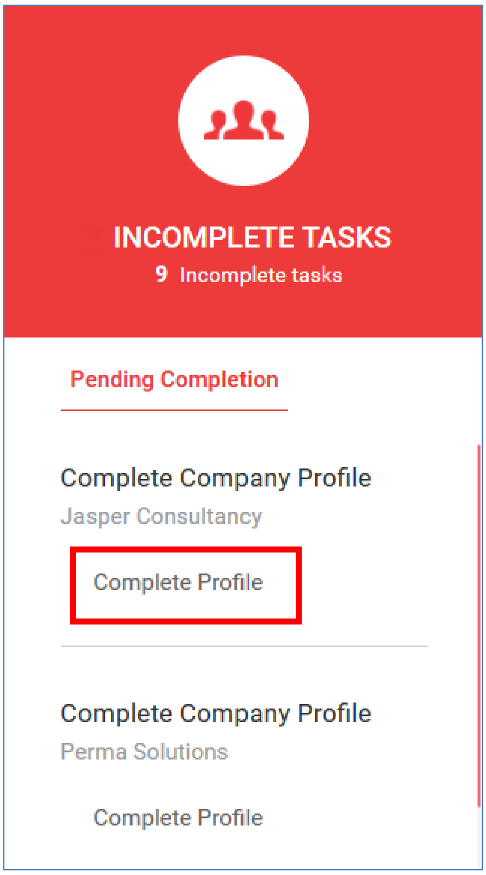



**Note:** You can view the pending tasks either **By Task** name or **By Customer** as highlighted in the image below:

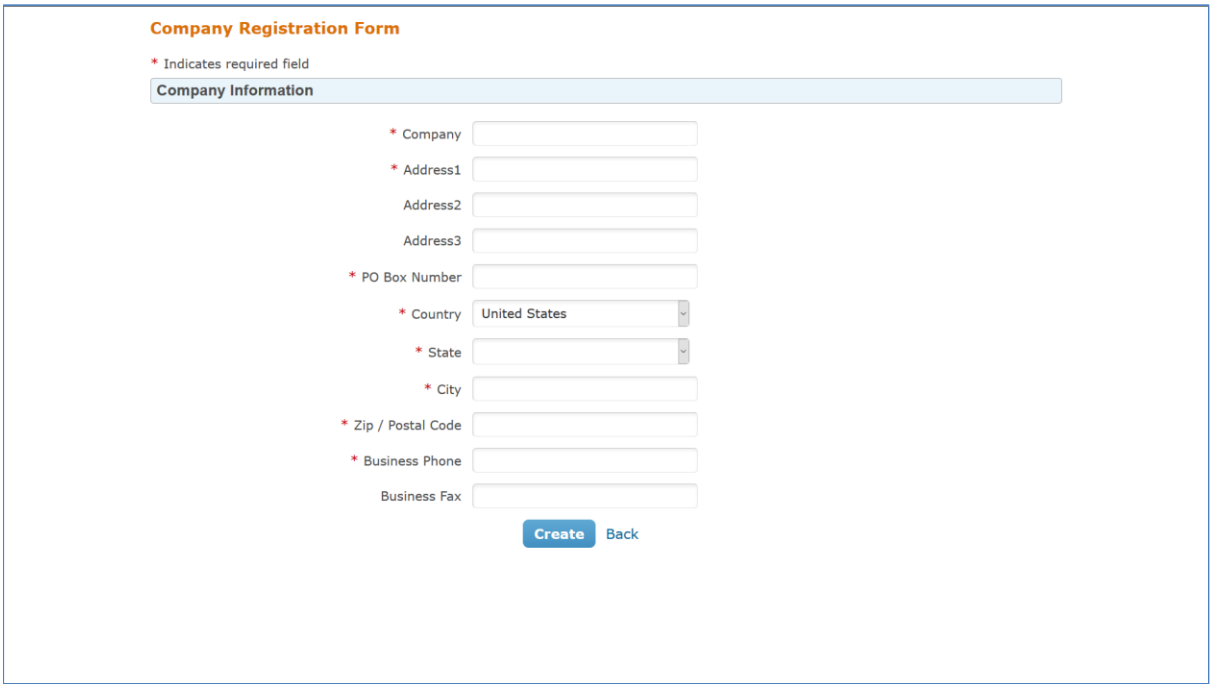



### 3.1.2 Pending Tasks – Complete Profile

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



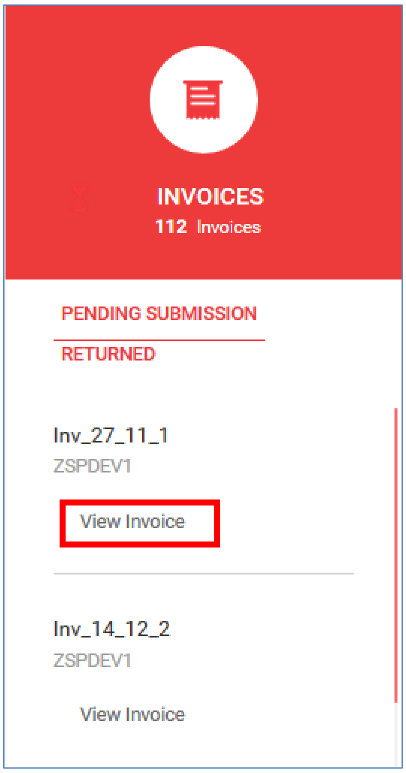

2. You will be navigated to the following page:



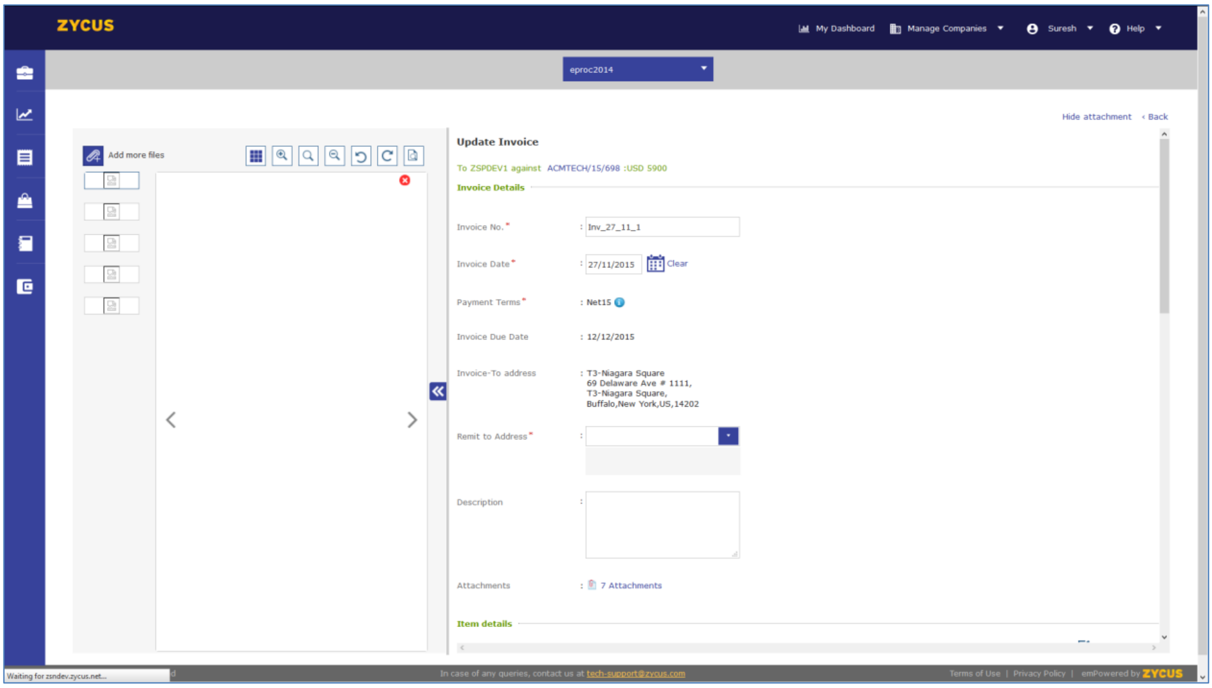

3. Fill in the information for your company and click **Create**.

### 3.1.3 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**.



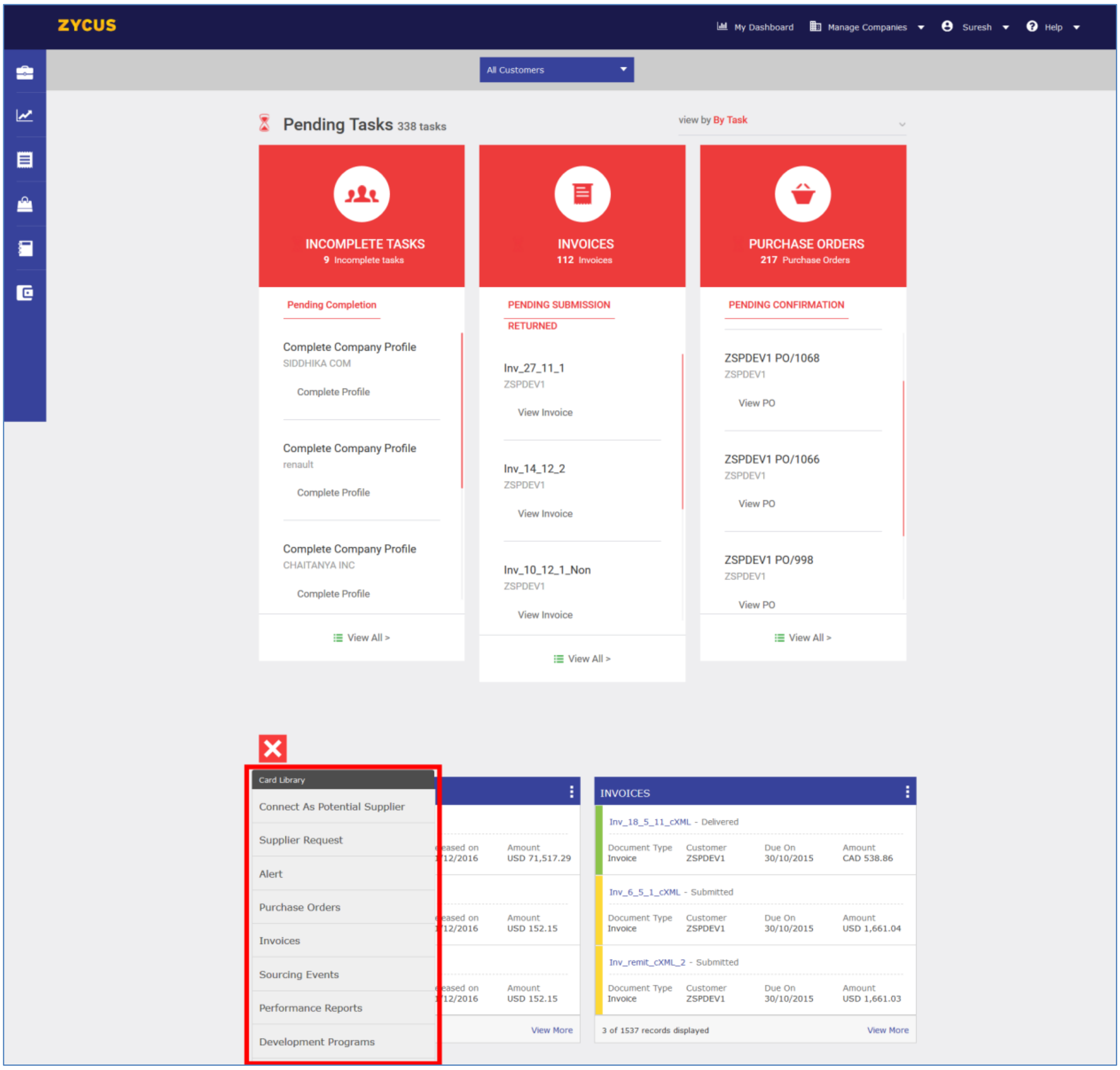
3. You will be navigated to the **Update Invoice** page:




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

## 3.2 ZSN Cards

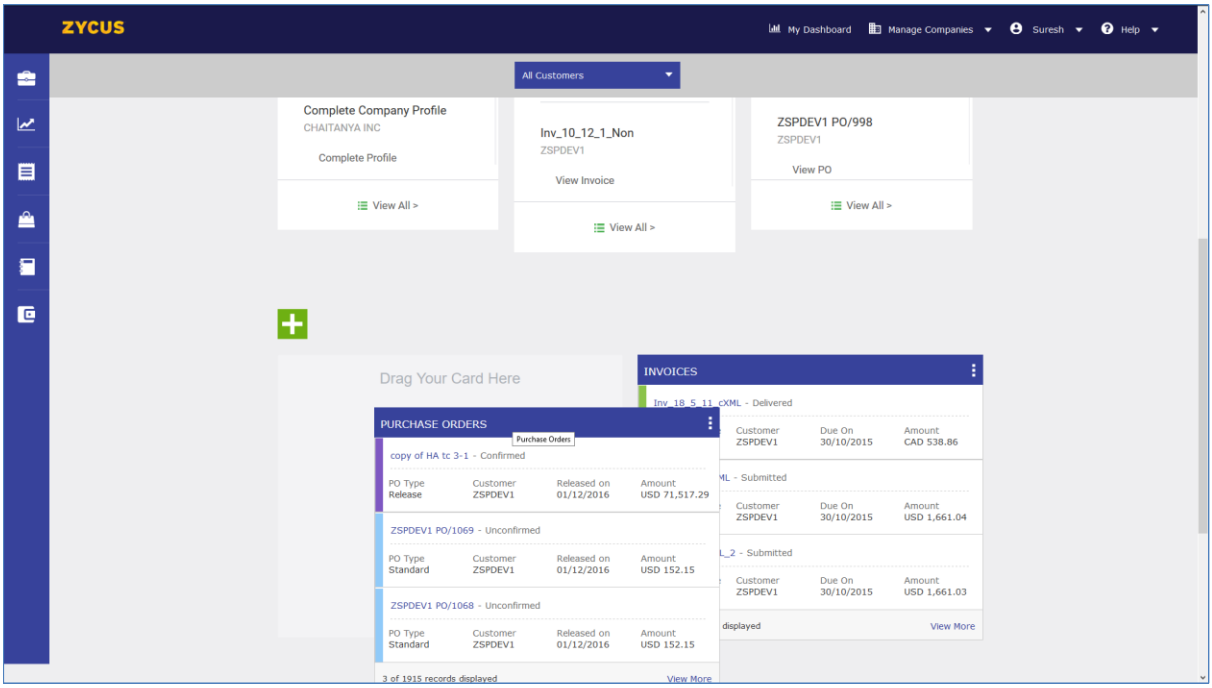
1. Click on the  icon to view the card library.



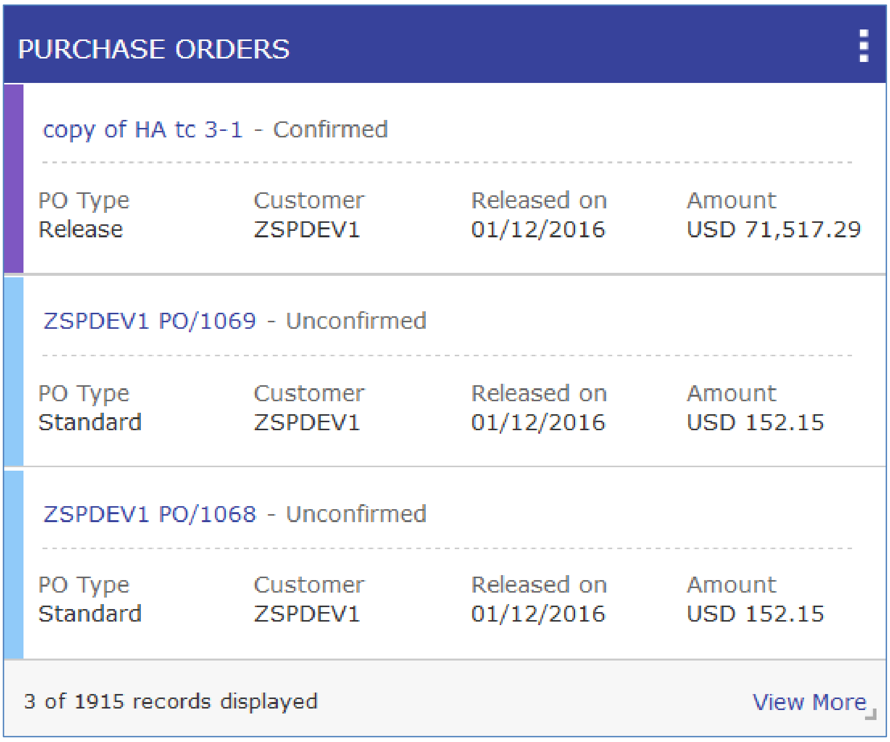

2. Select the cards from the list which you want to view on your homepage.

***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.




5. You can resize the cards from the card's border and corner using the and arrow.
6. You can also discard the cards by using the button. Click **Discard**, the card will disappear from the screen.
7. 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.





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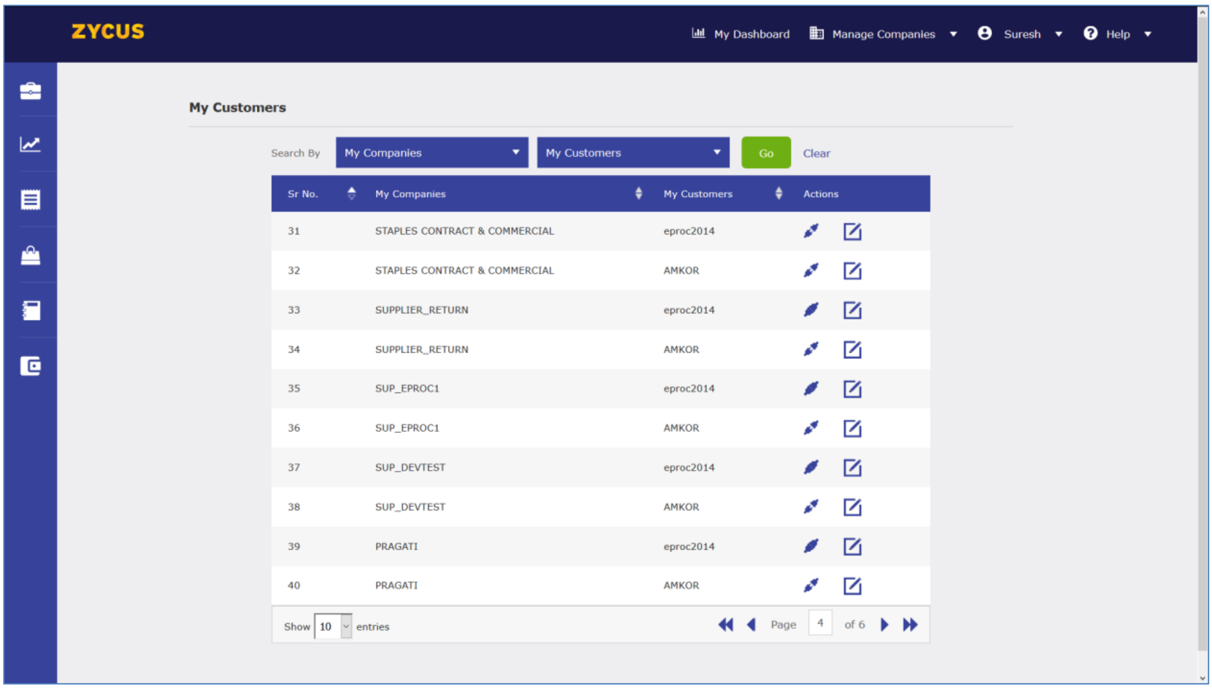
# Chapter 4: My Customers Filter

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.

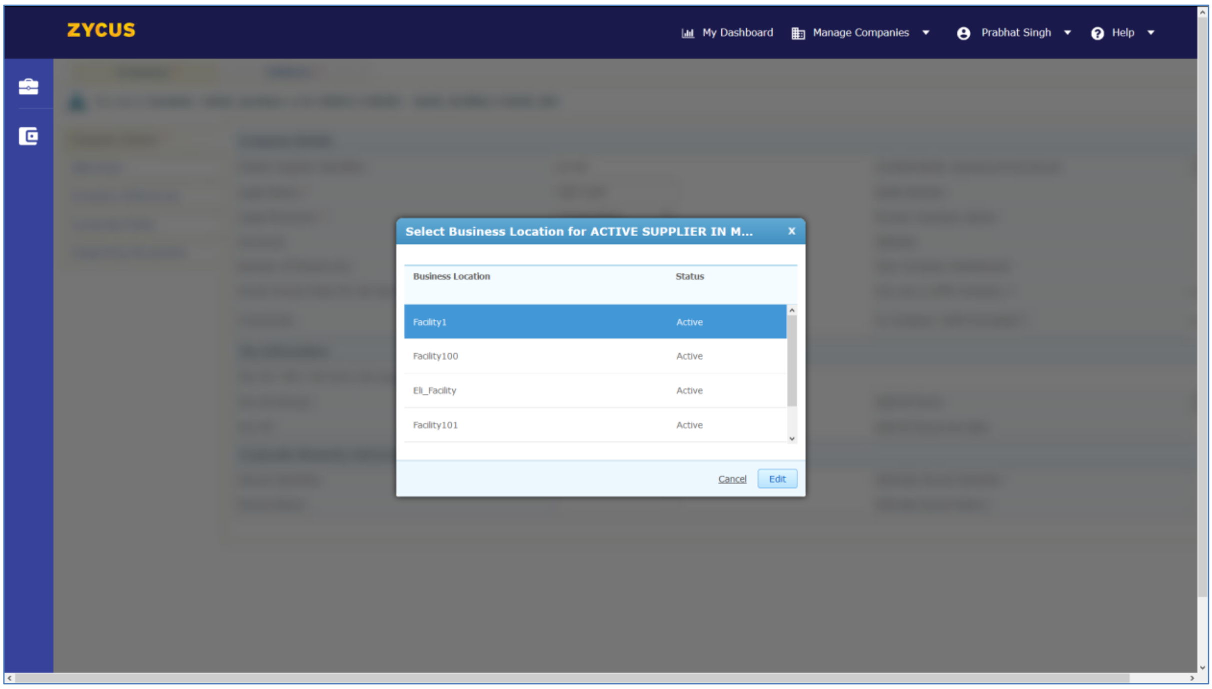
## 4.1 How to View the List of My Customers and View Data Relevant to a Customer?

**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**.




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.

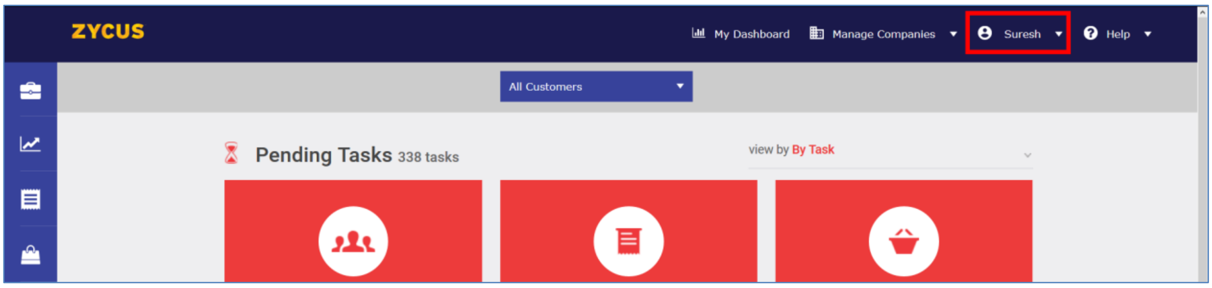



5. For next steps, refer **How to Edit a Supplier Company?**

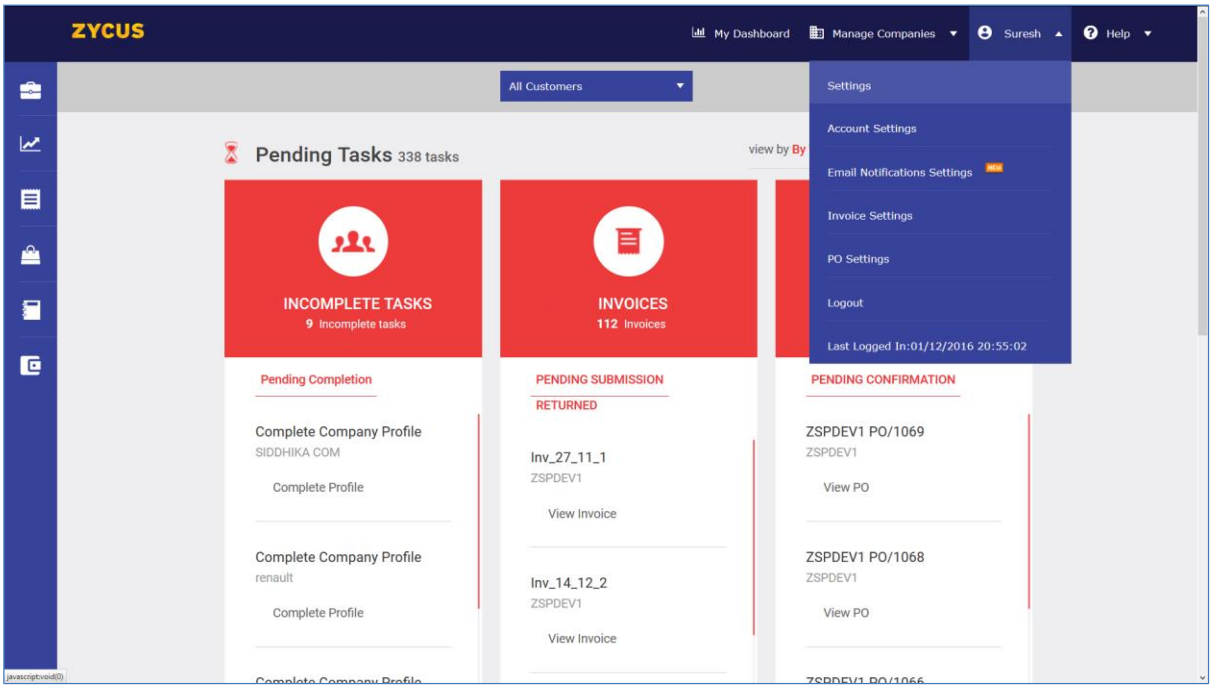
# Chapter 5: Settings

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:

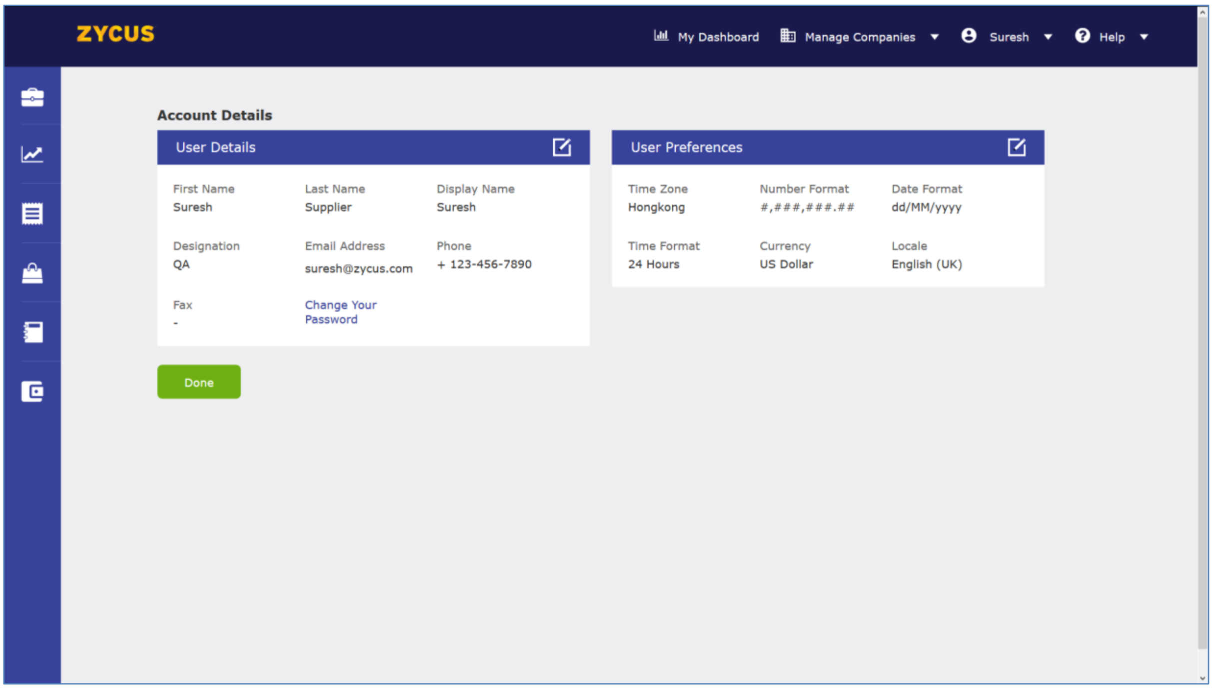



| Name | Description |
|---|---|
| **Account Settings** | Allows you to update your User Details & Preferences |
| **Email Notification Settings** | Allows you to enable email notifications to receive updates on Catalog, PO, and Invoices |
| **Invoice Settings** | Provides access to settings related to Invoice Delivery |
| **PO Settings** | 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.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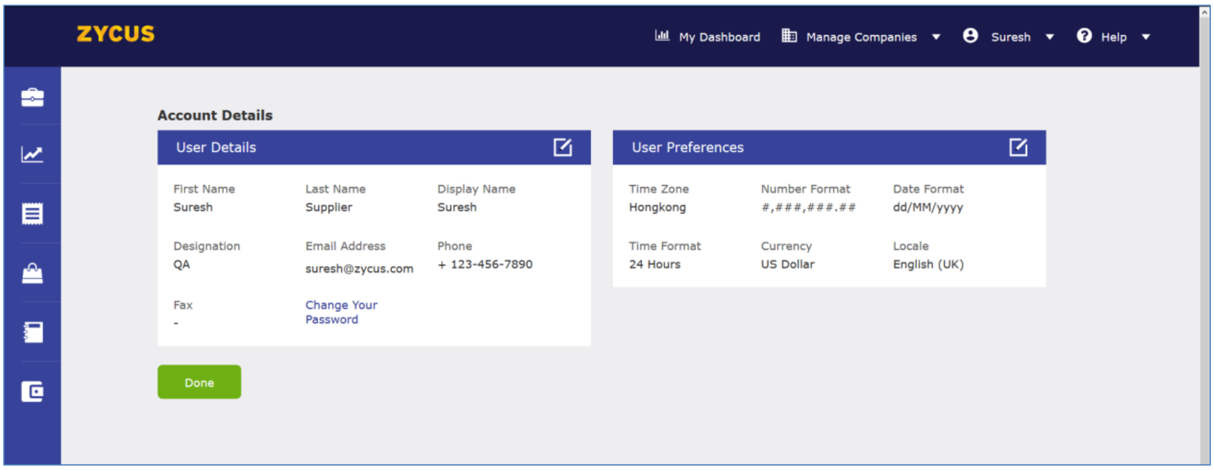
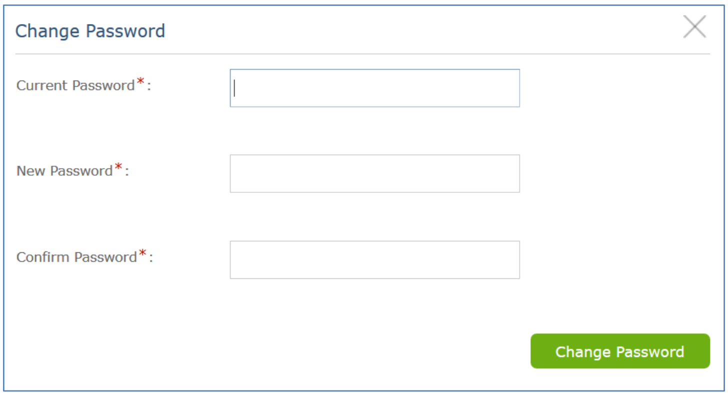
### 5.1.1 How Can I Change My Password?

**To edit User Details and Preferences:**

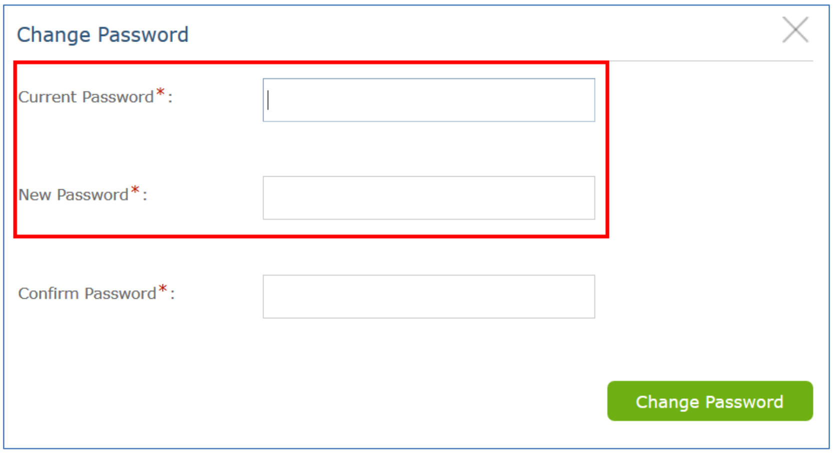
1. Navigate to the following location: Display Name > **Settings** > **Account Settings.**



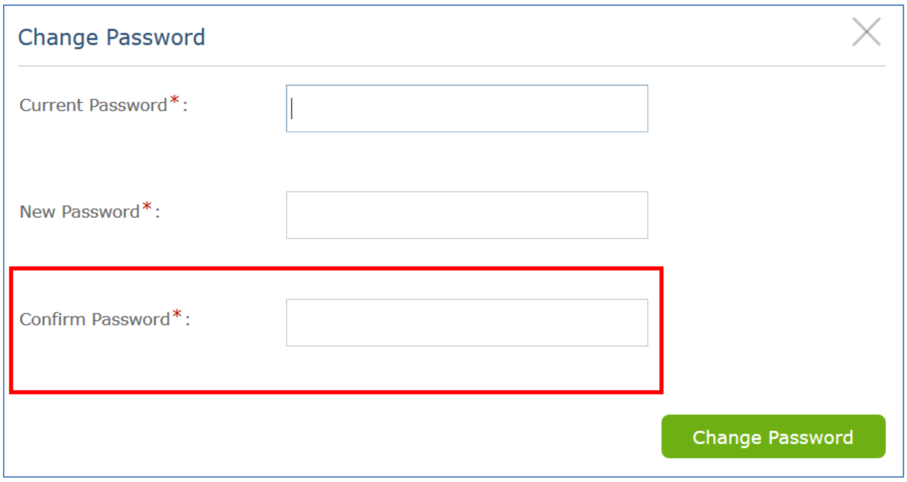

2. Click on the **Change Your Password** link.




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



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



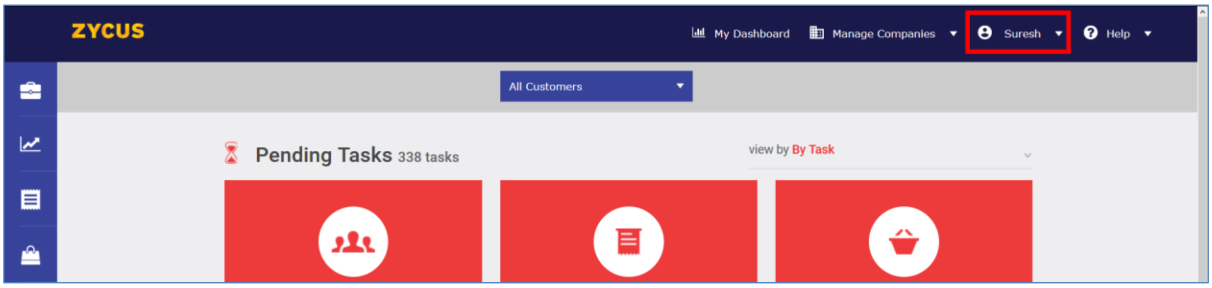

5. Click **Change Password** to complete the password change procedure.

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

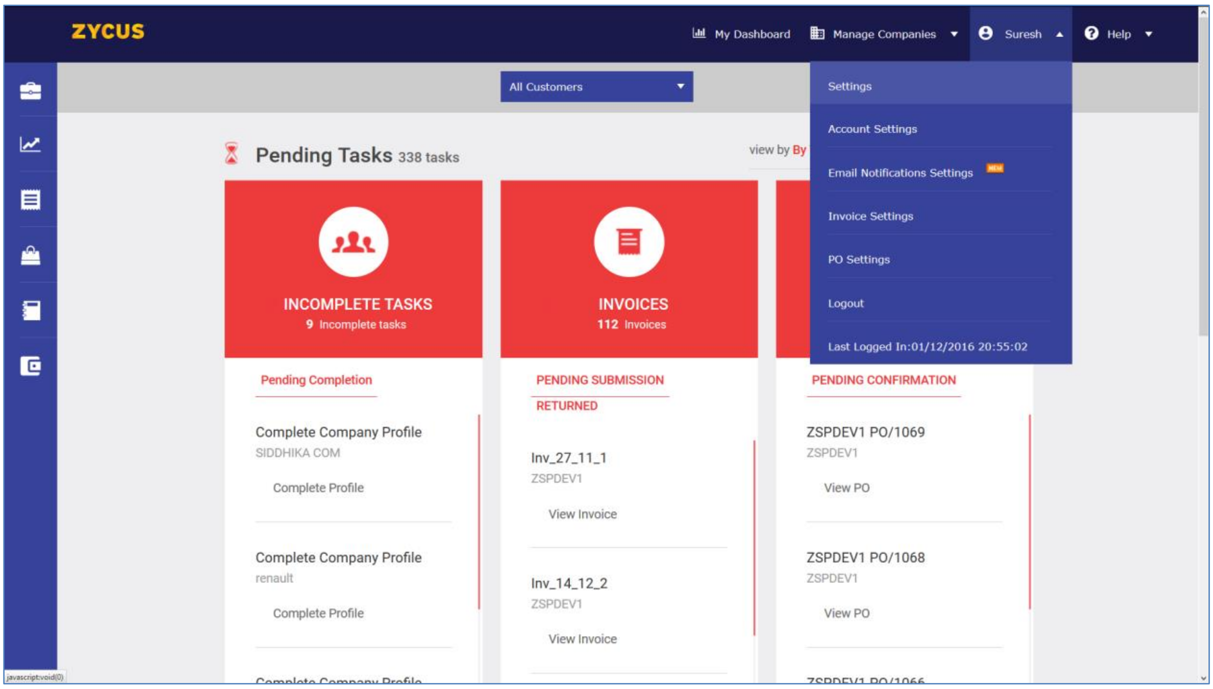
The **Email Notification Settings** allow you to configure setting so that you will receive notifications about PO, Invoice, and Catalogs.

### 5.2.1 Editing Email Notifications Settings

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

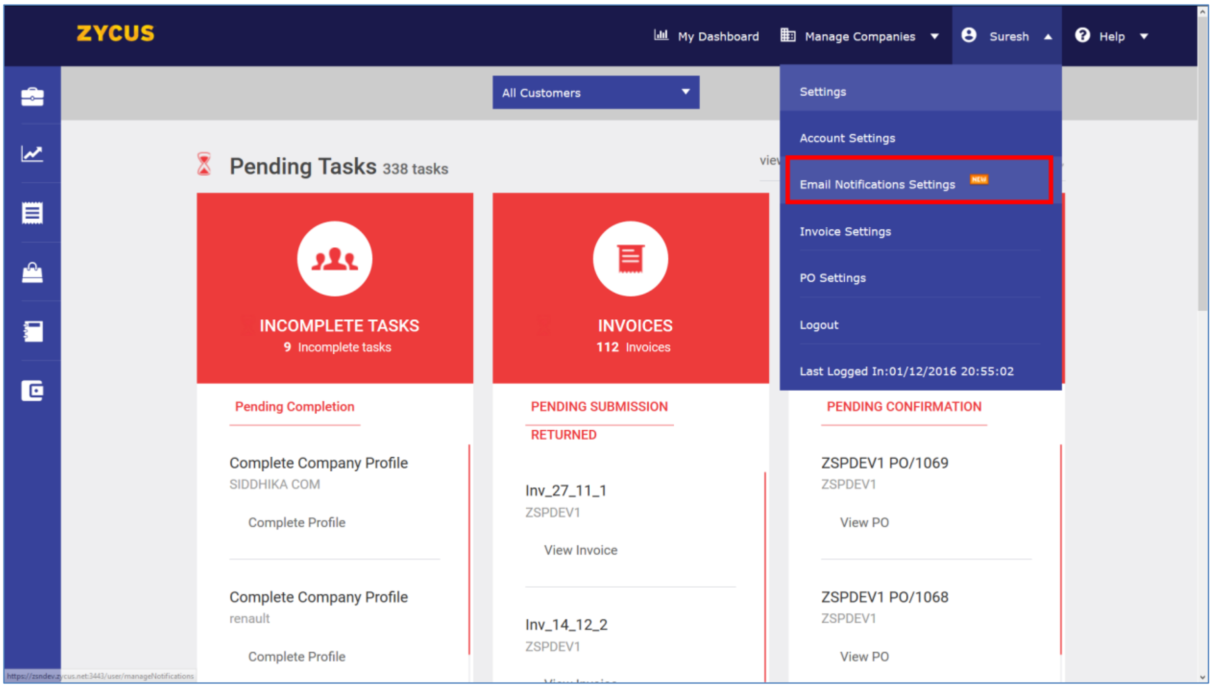



2. A menu will collapse. From the menu, click **Settings**.

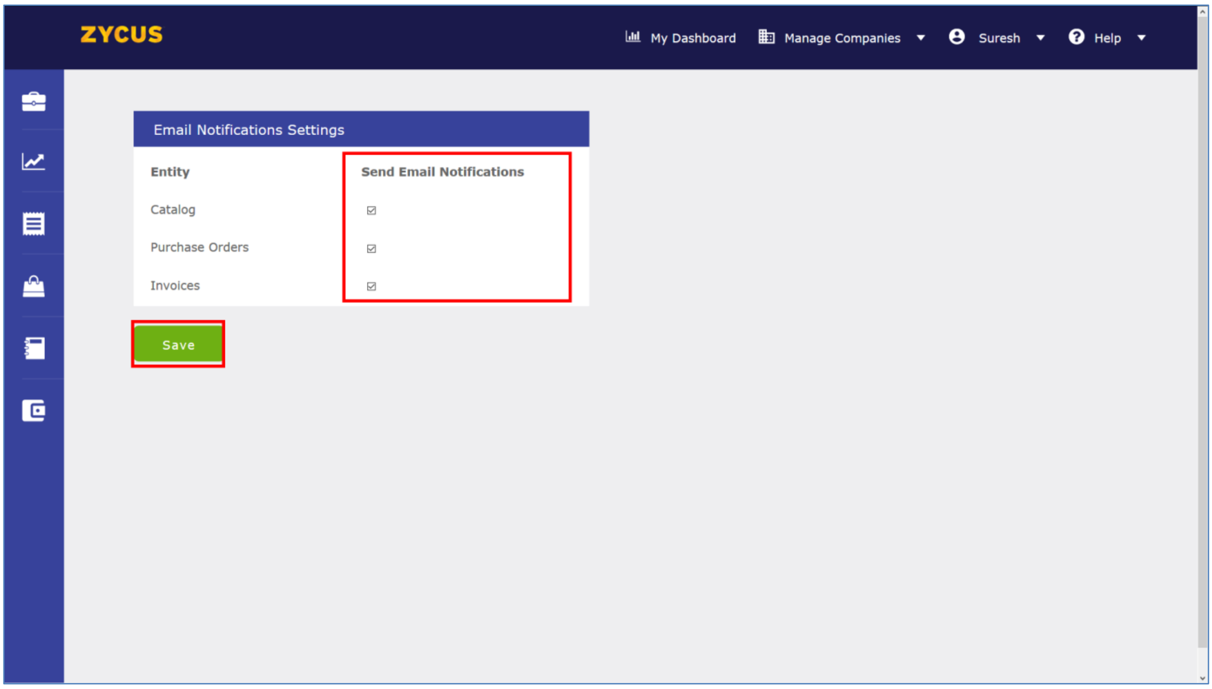



3. Settings section will expand and show the following options:
   - Account Settings
   - Email Notifications Settings
   - Invoice Settings
   - PO settings

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.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### 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:

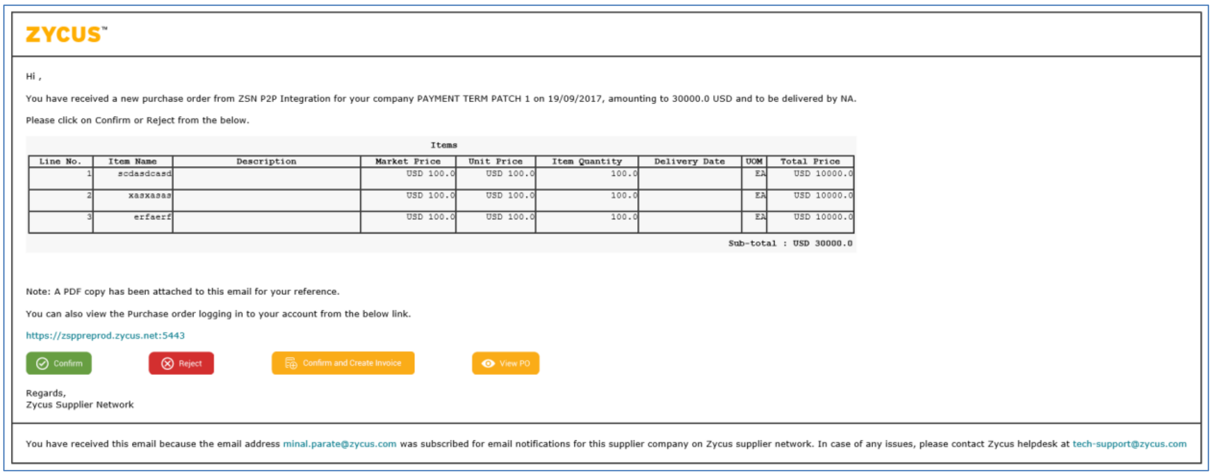
- New PO Received
- PO confirmed
- PO rejected
- New Invoice Creation
- Invoice Submitted
- Invoice in approval
- Invoice Rejected
- New Catalog Submitted
- Catalog Approved
- Catalog Rejected
- Catalog Published

**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:



ZYCUS™

Hi ,

You have received a new purchase order from ZSN P2P Integration for your company PAYMENT TERM PATCH 1 on 19/09/2017, amounting to 30000.0 USD and to be delivered by NA.

Please click on Confirm or Reject from the below.

Items

| Line No. | Item Name | Description | Market Price | Unit Price | Item Quantity | Delivery Date | UOM | Total Price |
|---|---|---|---|---|---|---|---|---|
| 1 | scdasdcasd | | USD 100.0 | USD 100.0 | 100.0 | | EA | USD 10000.0 |
| 2 | xasxasas | | USD 100.0 | USD 100.0 | 100.0 | | EA | USD 10000.0 |
| 3 | erfaerf | | USD 100.0 | USD 100.0 | 100.0 | | EA | USD 10000.0 |

Sub-total : USD 30000.0

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.

https://zsppreprod.zycus.net:5443

Confirm   Reject   Confirm and Create Invoice   View PO

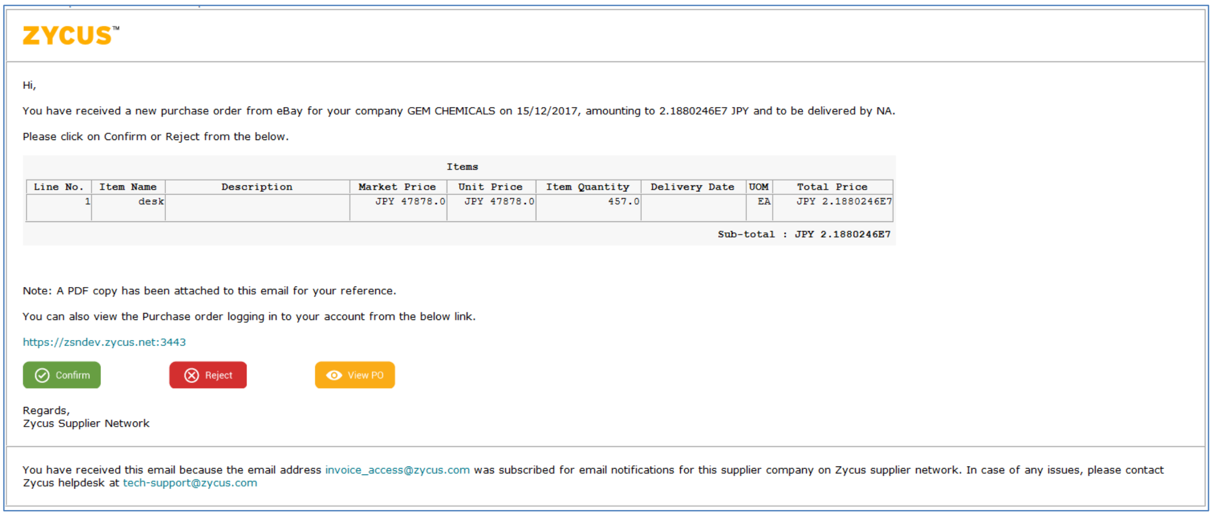
Regards,
Zycus Supplier Network

You have received this email because the email address 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

**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:


ZYCUS™

Hi,

You have received a new purchase order from eBay for your company GEM CHEMICALS on 15/12/2017, amounting to 2.1880246E7 JPY and to be delivered by NA.

Please click on Confirm or Reject from the below.

Items

| Line No. | Item Name | Description | Market Price | Unit Price | Item Quantity | Delivery Date | UOM | Total Price |
|---|---|---|---|---|---|---|---|---|
| 1 | desk | | JPY 47878.0 | JPY 47878.0 | 457.0 | | EA | JPY 2.1880246E7 |

Sub-total : JPY 2.1880246E7

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.

https://zsndev.zycus.net:3443

Confirm Reject View PO

Regards,
Zycus Supplier Network

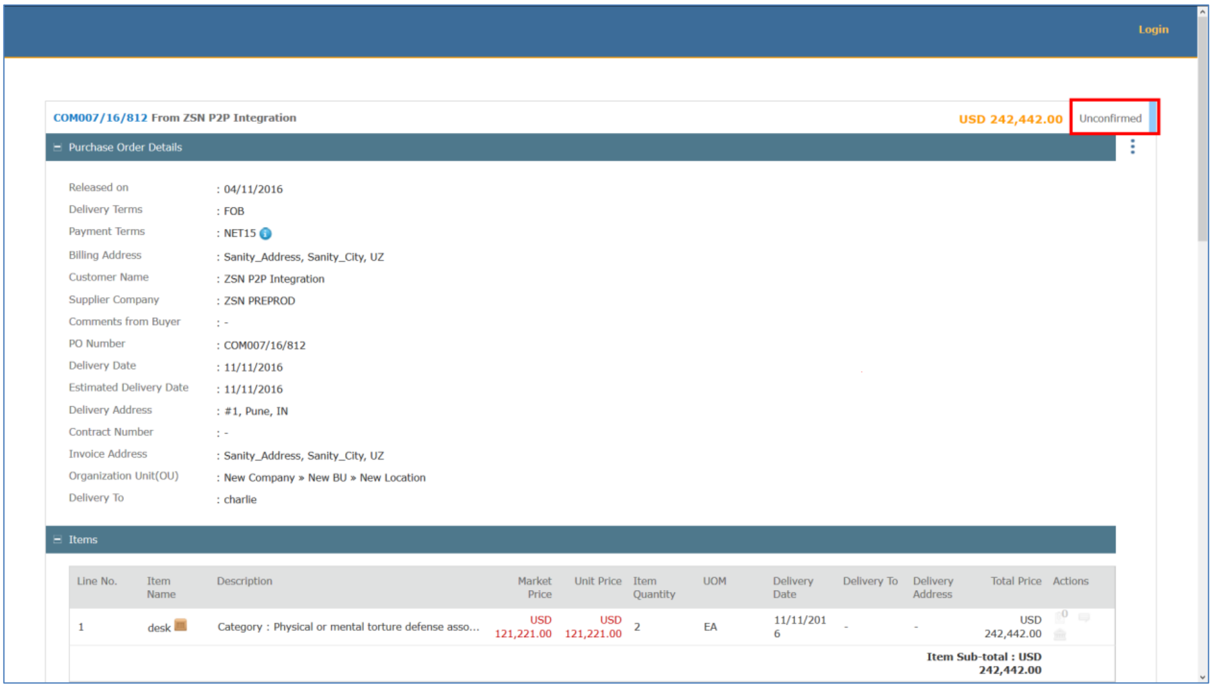
You have received this email because the email address invoice_access@zycus.com was subscribed for email notifications for this supplier company on Zycus supplier network. In case of any issues, please contact Zycus helpdesk at tech-support@zycus.com

***NOTE:*** The emails received will contain the details of the PO and the PDF attachment of the PO.

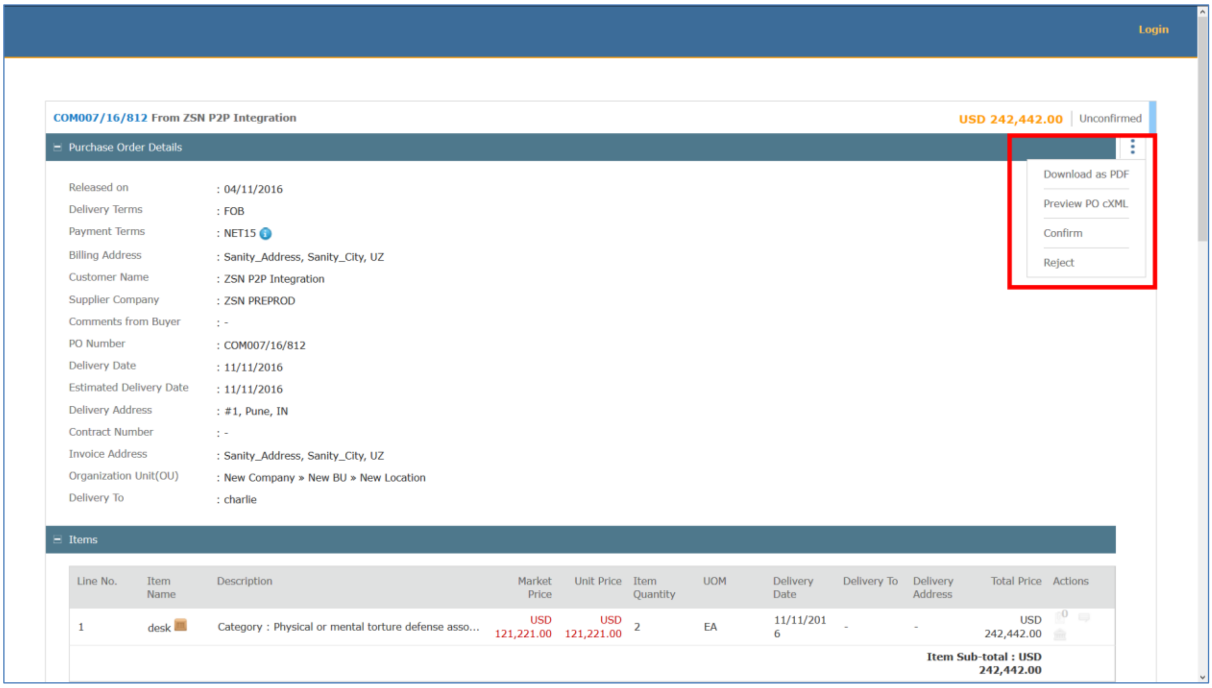
3. The emails will have actionable buttons. You can choose to **Confirm**, **Reject, Confirm PO, and Create Invoice** or **View PO** from the email.
4. If you are a registered user, you can perform these actions without logging in to the ZSN tool. However, you won't be able to navigate anywhere else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

#### 5.2.3.1 View PO

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

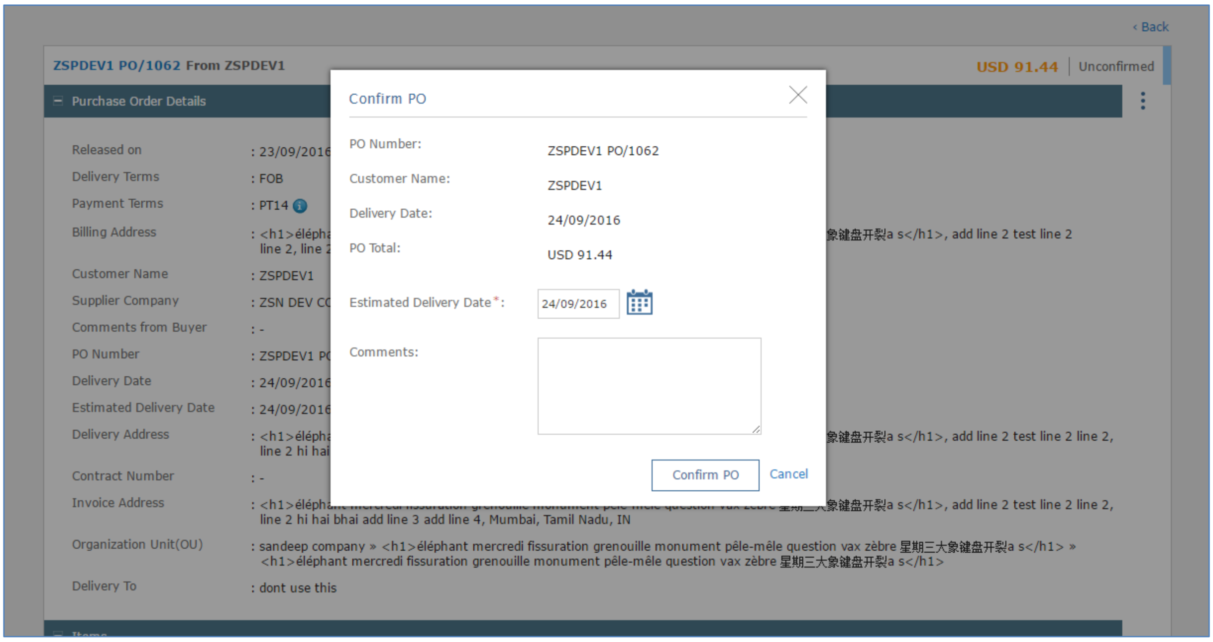



1. The status of the PO will be unconfirmed *(highlighted in the image above).*
2. You can take actions (**Download as PDF, Preview PO cXML, Confirm, Reject**) on this PO by clicking the actions menu.

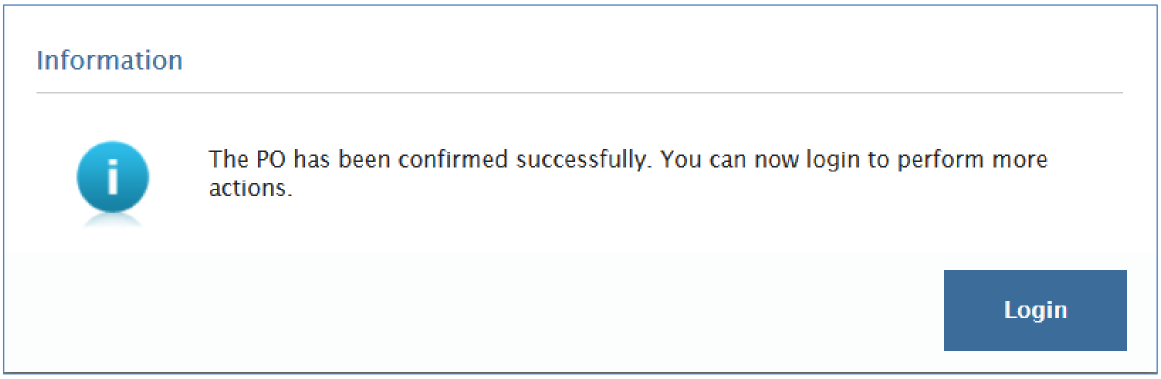


### *5.2.3.2 Confirm PO*

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



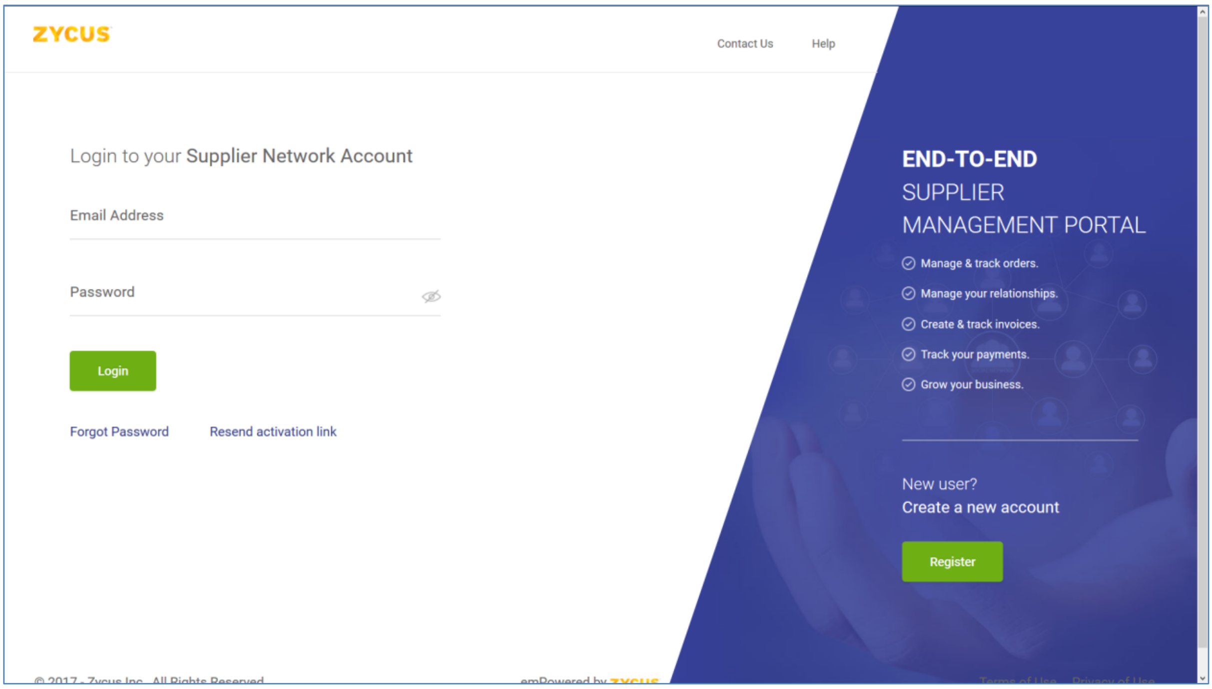
2. Enter the **Estimated Delivery Date** and **Comments** before clicking **Confirm PO**.
3. You will be able to confirm the PO without logging on ZSN.
4. Once confirmed, you will get a notification about PO confirmation as shown below.



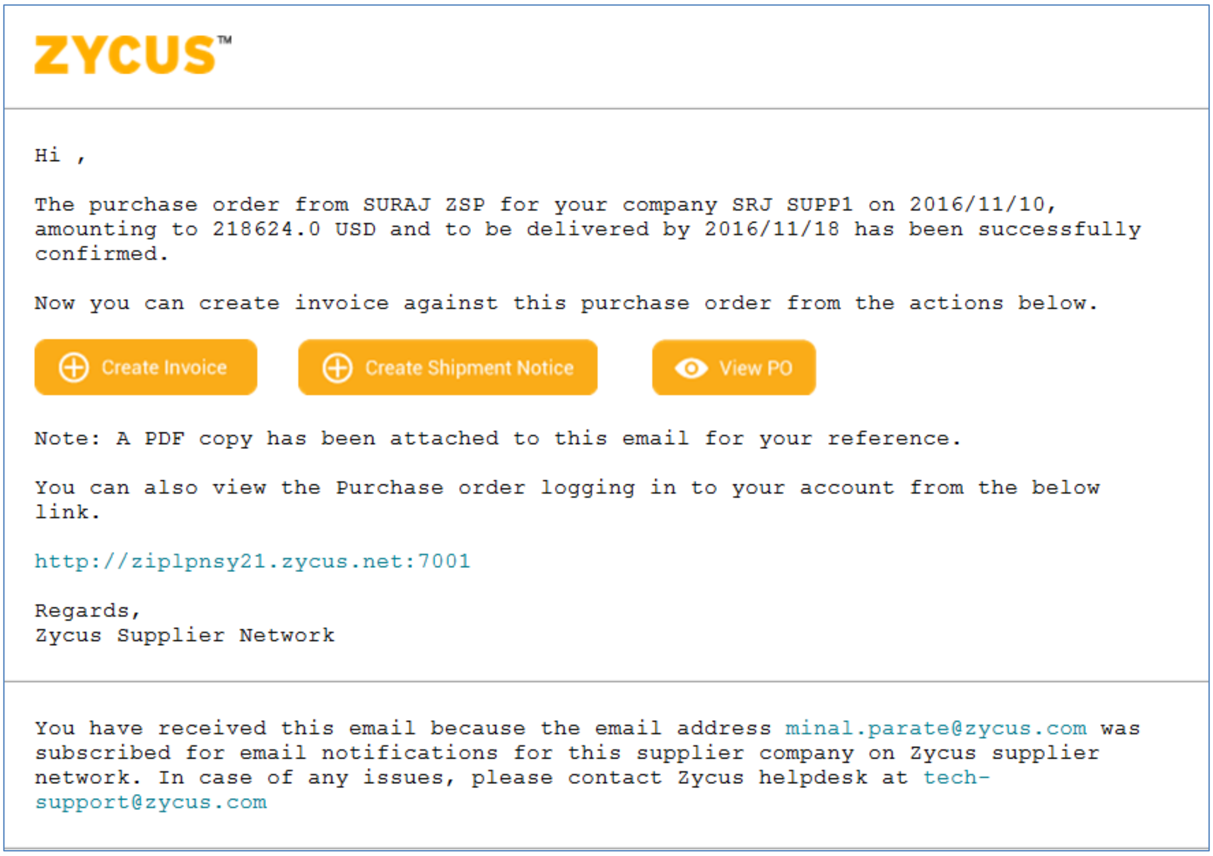

***NOTE:*** To take more actions, click **Login**.

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.



ZYCUS™

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.

Create Invoice | Create Shipment Notice | View PO

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

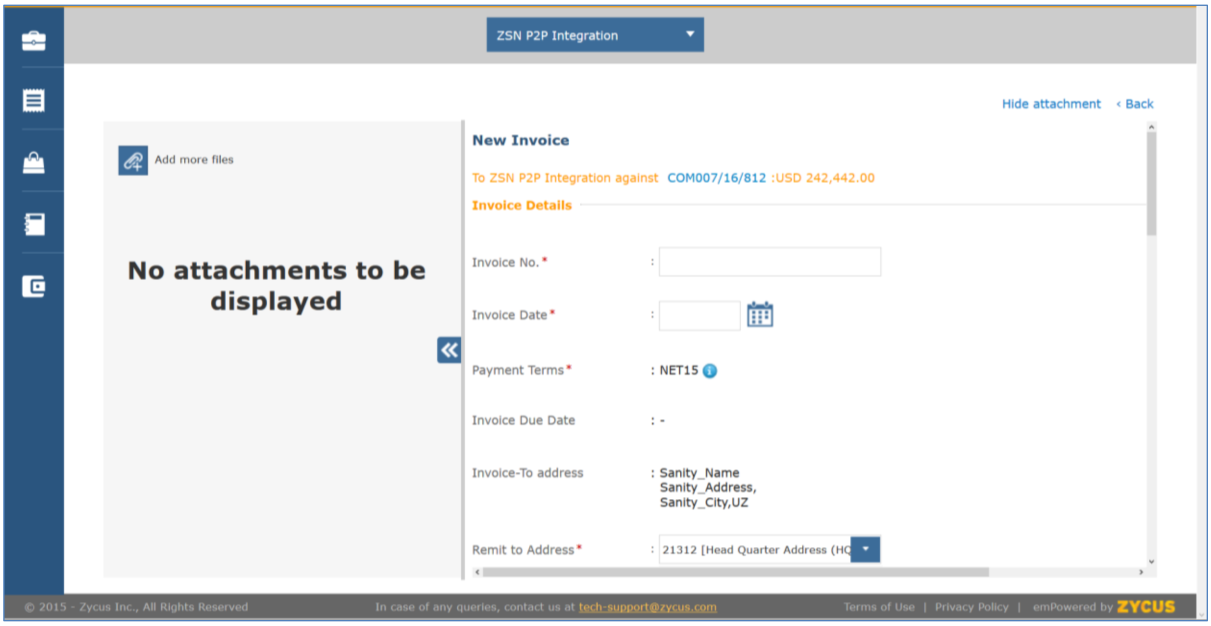
Regards,
Zycus Supplier Network

You have received this email because the email address minal.parate@zycus.com 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

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

### *5.2.3.3 Create Invoice*

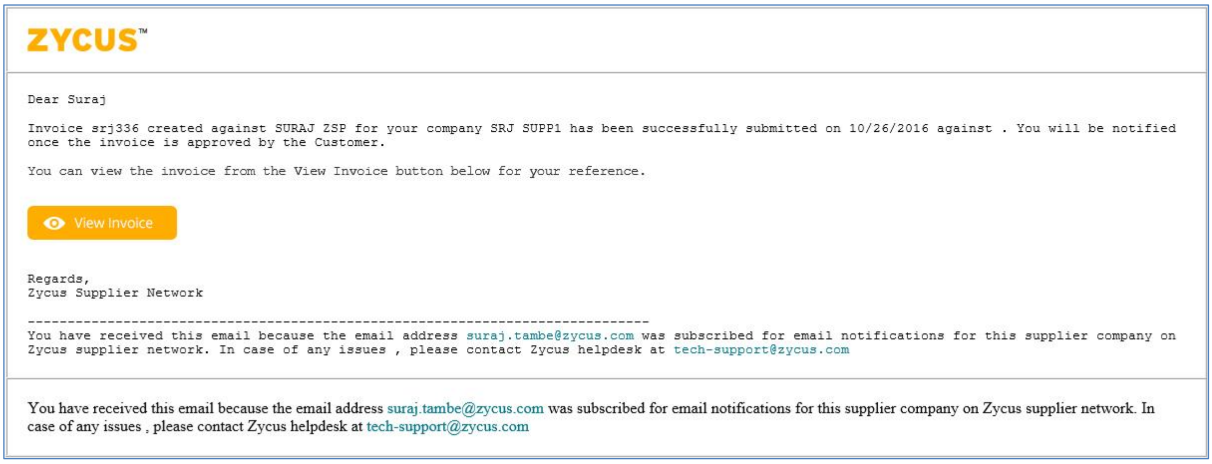
1. Click **Create Invoice** from the email, you will be navigated to the following page:



***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:



Dear Suraj

Invoice srj336 created against SURAJ ZSP for your company SRJ SUPP1 has been successfully submitted on 10/26/2016 against . You will be notified once the invoice is approved by the Customer.

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

View Invoice

Regards,
Zycus Supplier Network

--------------------------------------------------------------------------------
You have received this email because the email address suraj.tambe@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

You have received this email because the email address suraj.tambe@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

***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.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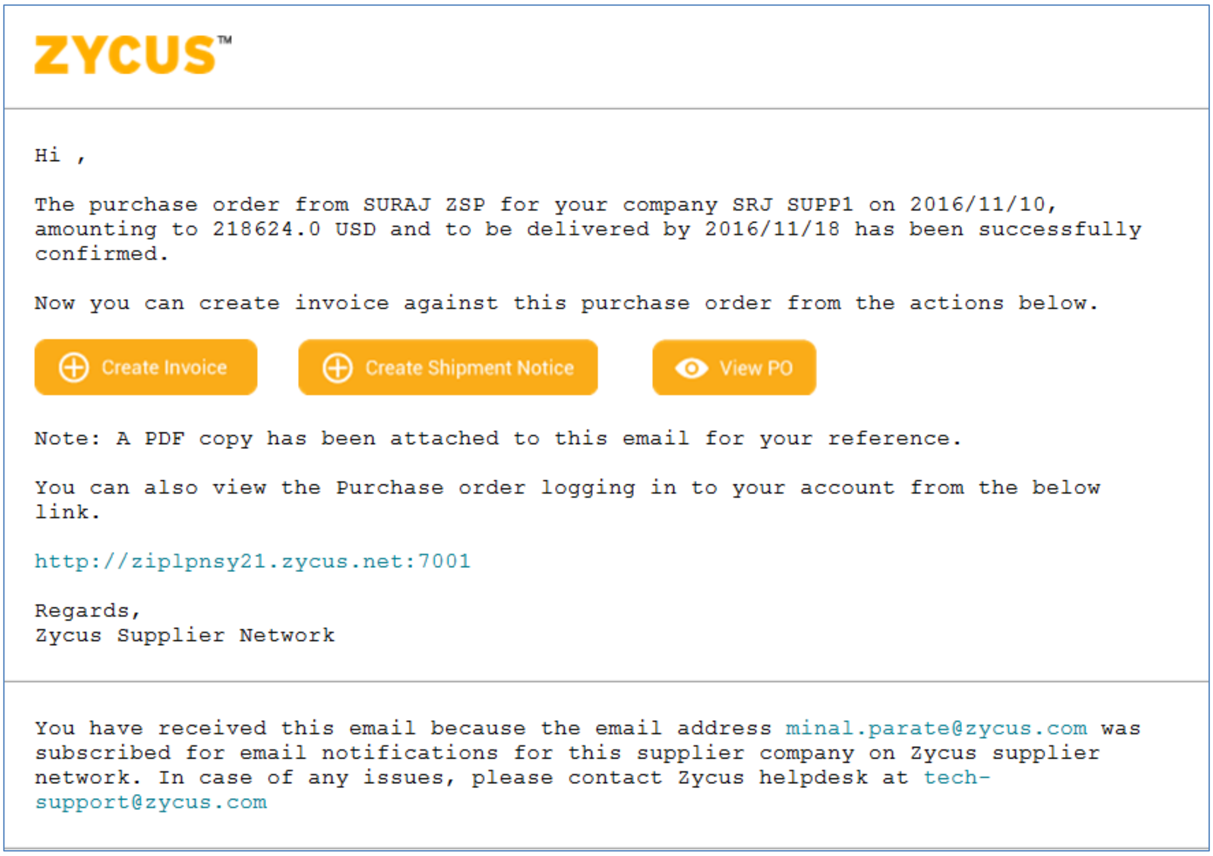
#### 5.2.3.5 *Create Shipment Invoice*

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.

Create Invoice | Create Shipment Notice | View PO

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

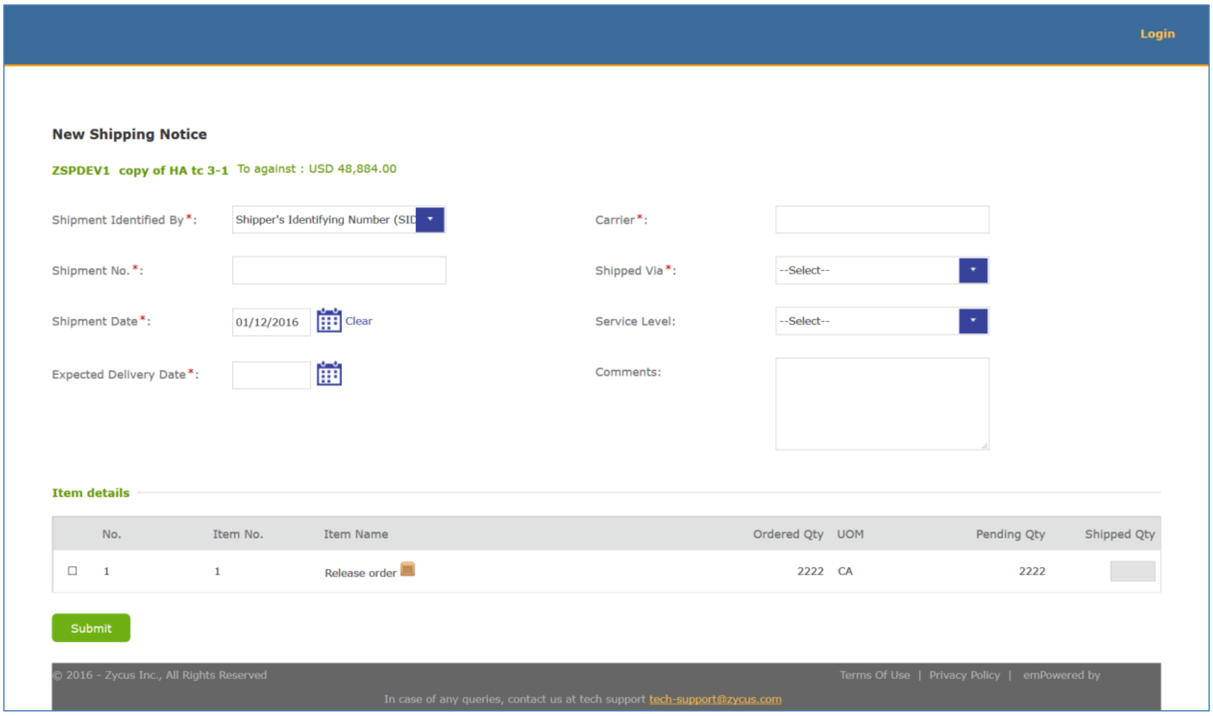
You can also view the Purchase order logging in to your account from the below link.

http://ziplpnsy21.zycus.net:7001

Regards,
Zycus Supplier Network

You have received this email because the email address minal.parate@zycus.com 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

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




3. Fill in the shipping details and click **Submit**.

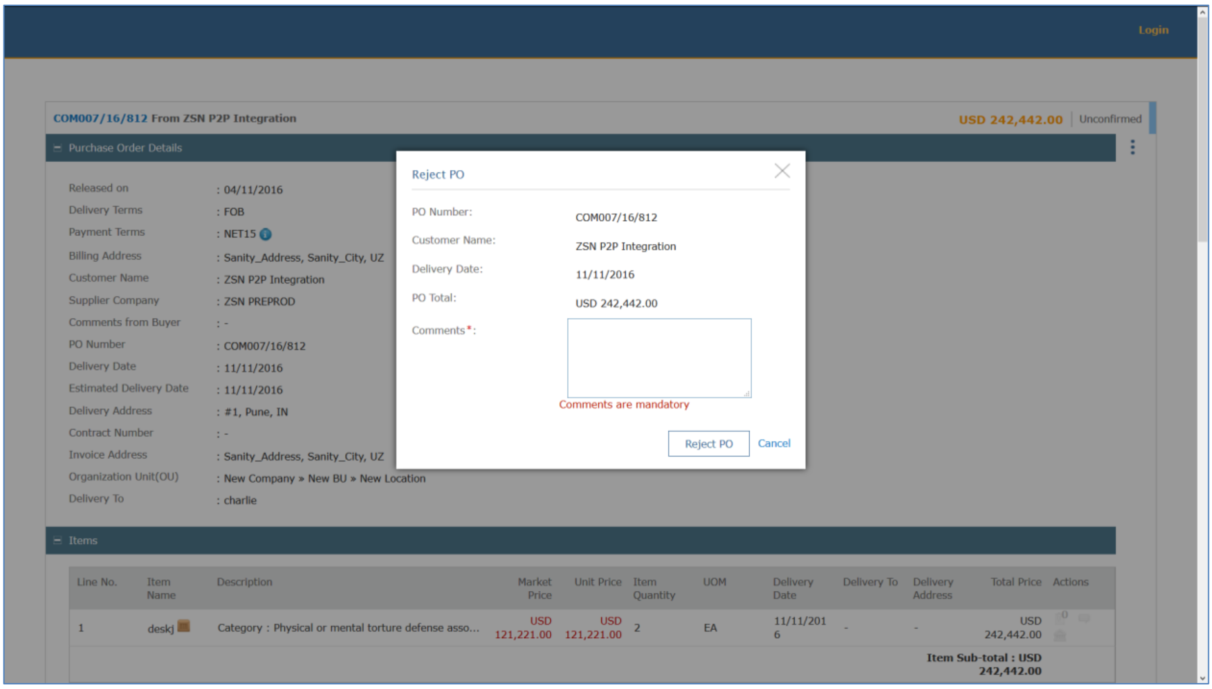
4. You won't be able to navigate anywhere else in the tool. After clicking **Submit**, you will see the following message popup: **"You have now successfully submitted the shipment notice against the Purchase order. You can now login to perform more actions."**

5. You can choose to login to ZSN or close the application.

6. 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**."
7. 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.

Dear Krishma Maniar,

Catalog CT_OCT_51 Version 1 created against ZSN P2P Integration for the company ZSN PREPROD has been successfully submitted on 04/11/2016. You will be notified once the catalog is published by the Customer.

You can view the catalog from the View Catalog link below for the reference.

View Catalog

Regards,
Zycus Supplier Network

You have received this email because the email address krishma.maniar@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

**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.

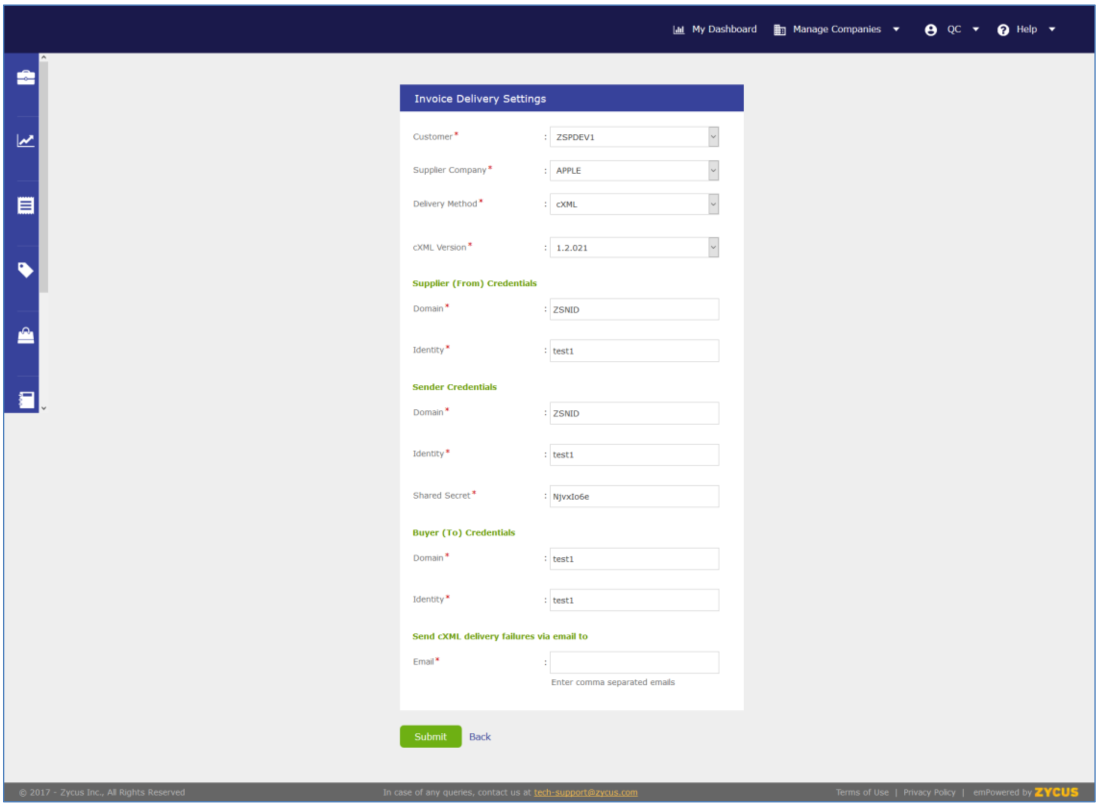
## 5.3 How to Change the Invoice Settings?

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**

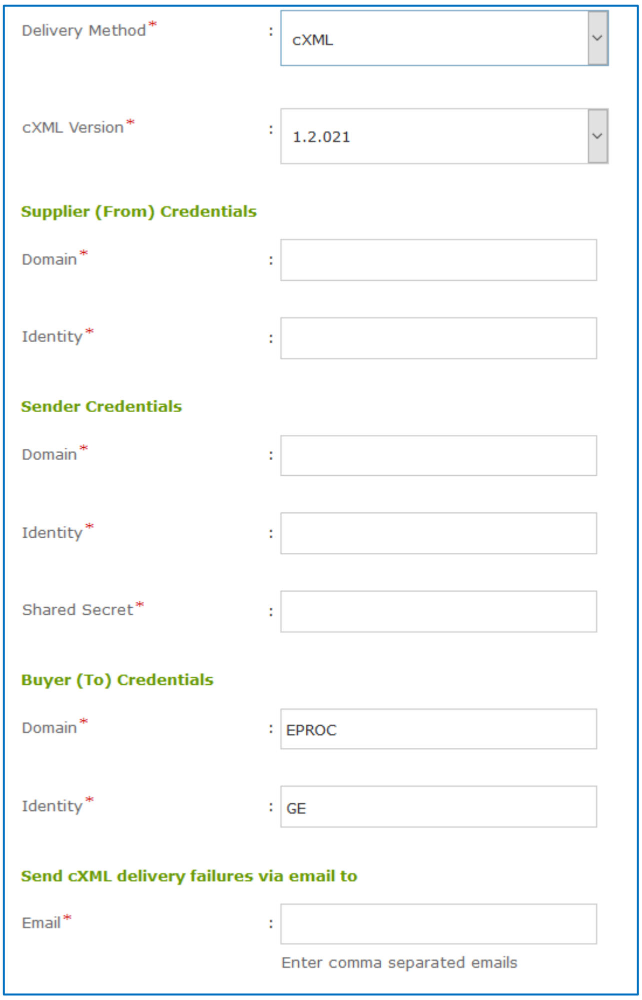


2. Select the required **Customer** and **Supplier Company**.

3. Select the required Invoice Delivery option under the **Delivery Method** drop-down.

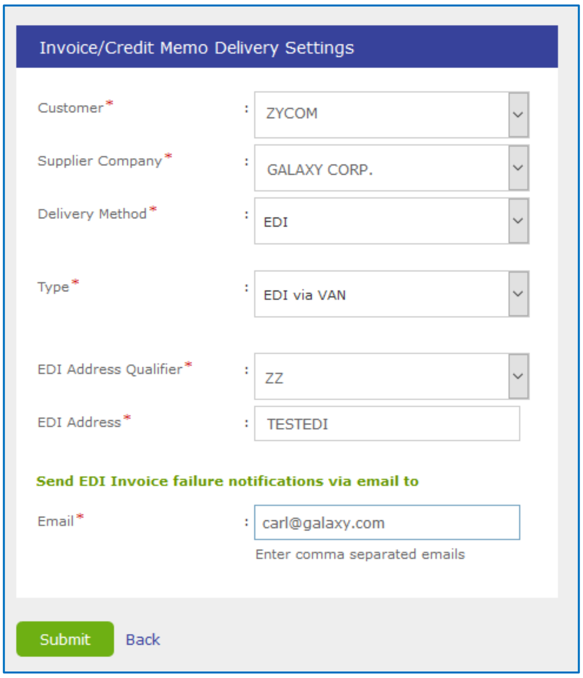
4. Perform the required steps based on the **Delivery Method** selected:

A. **cXML**:




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):




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.*

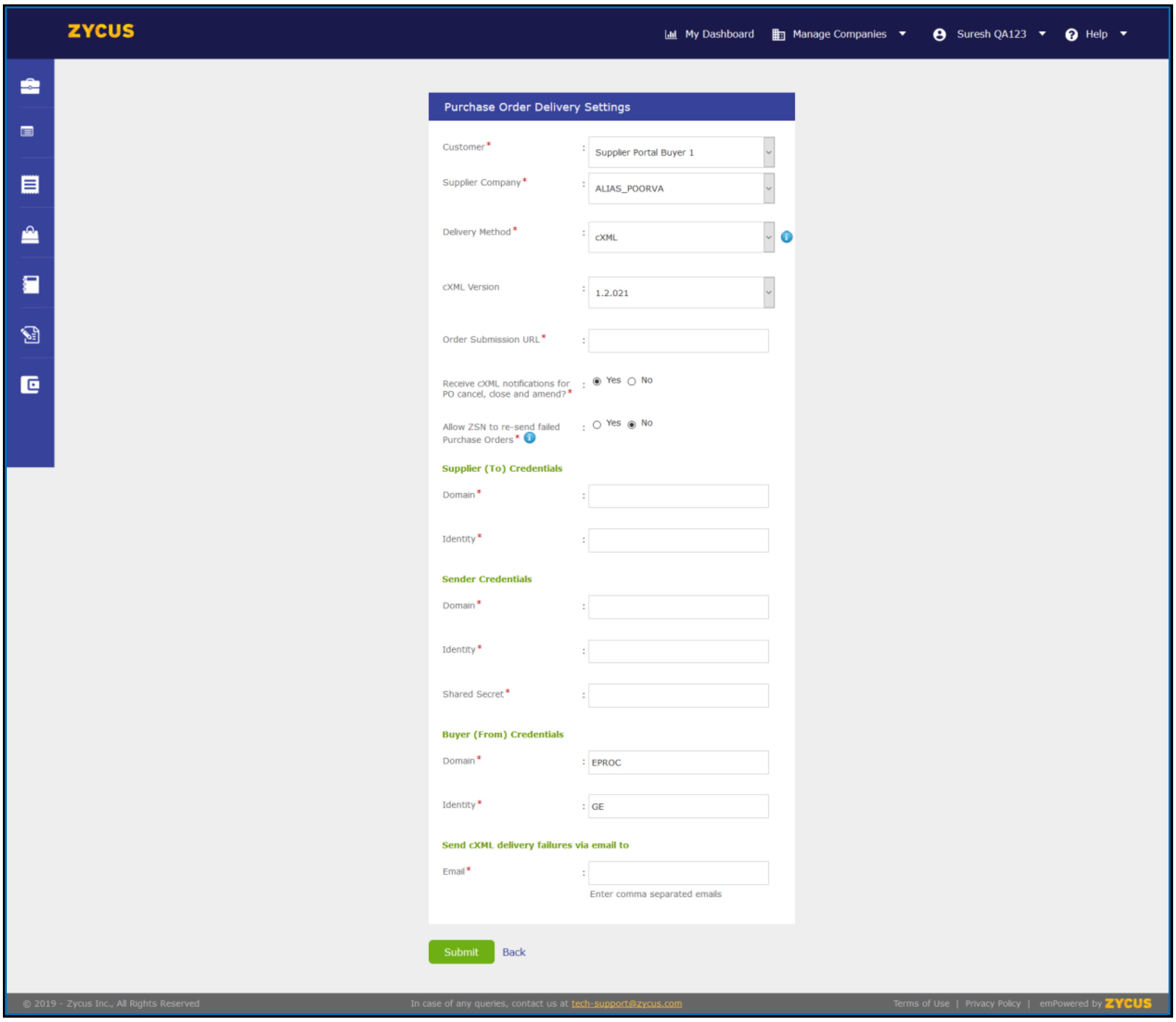
## 5.4 How to Edit the PO Settings?

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:**

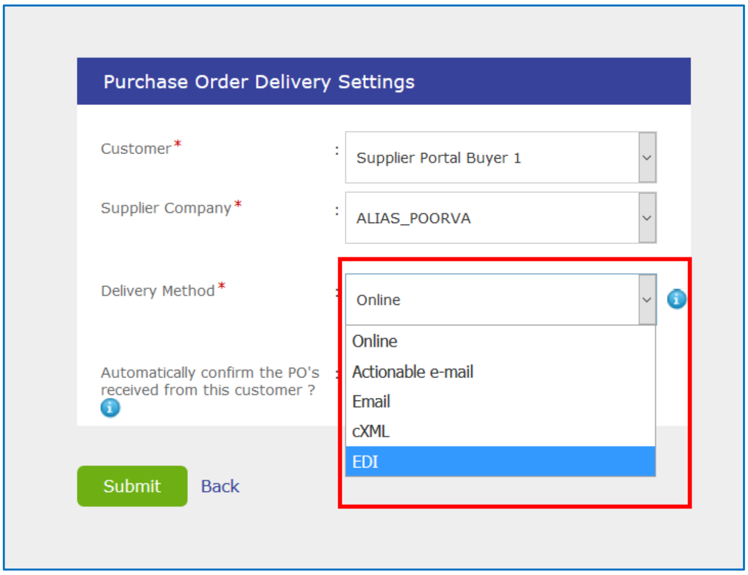
1. Navigate to the following location: “Your Display Name” > **Settings** > **PO Settings**




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:

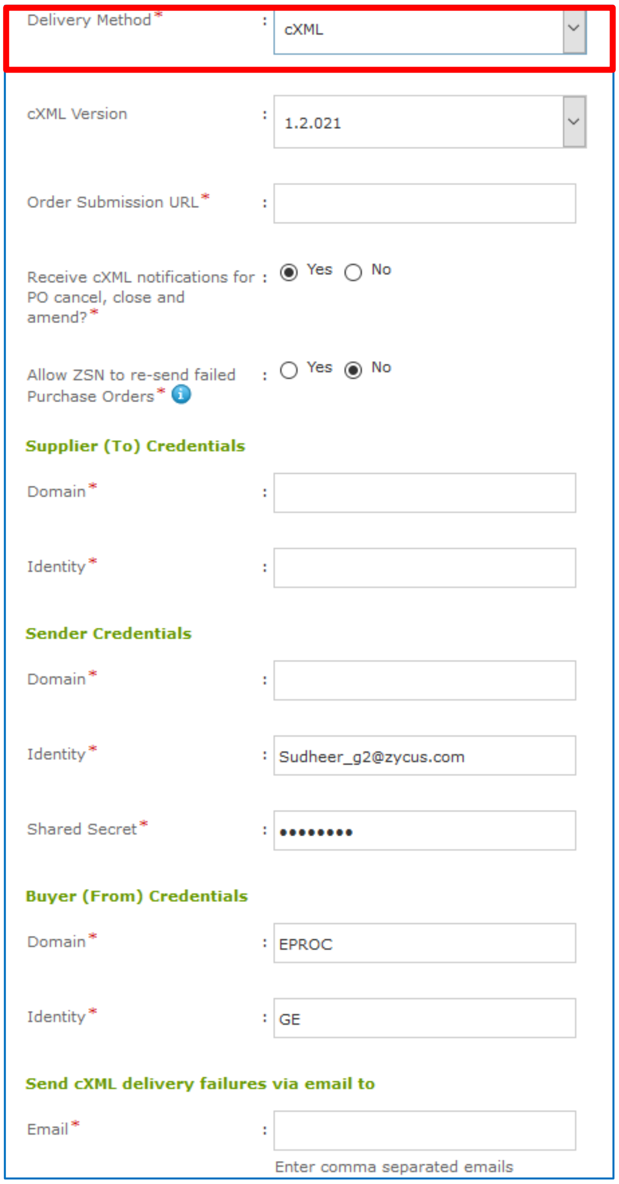



A. **Online:** POs will be visible upon logging into the network. This will be the default PO delivery method for new suppliers.
   i. Choose if you want to **Automatically confirm the PO's received from this customer.** The default setting will be **No.**
   ii. Enabling this setting will automatically 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**:




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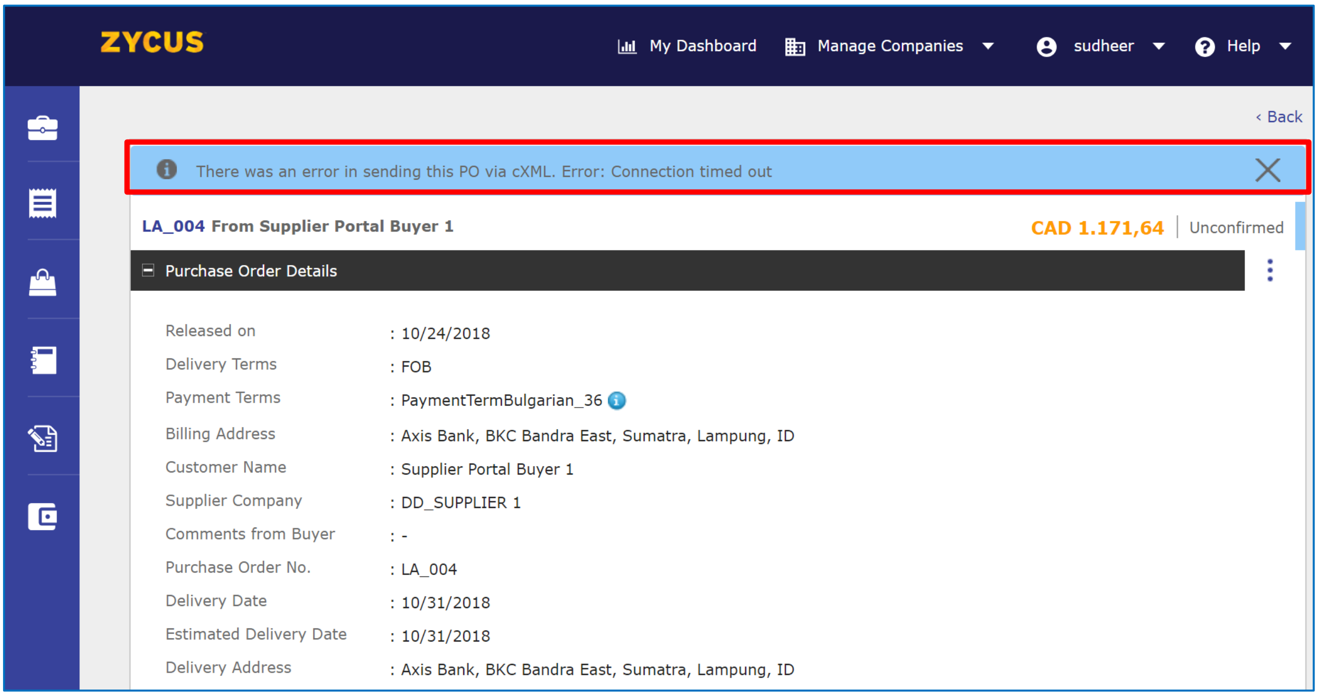
these failure emails. The email will contain a consolidated list of PO's that have failed over the past few hours.

- 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:

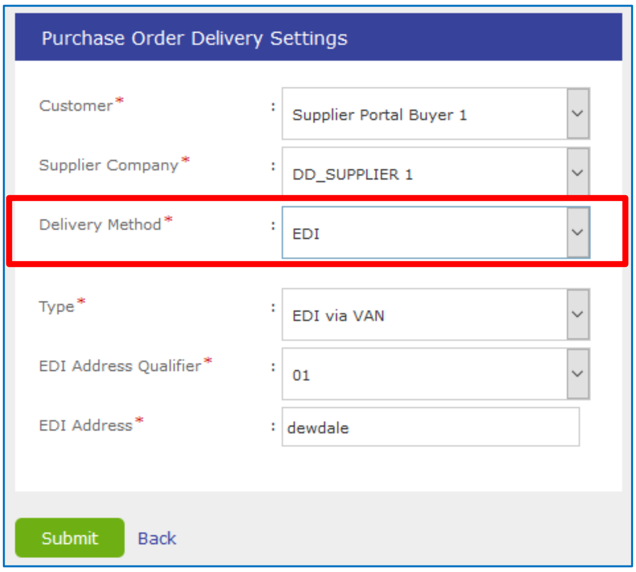



- A yellow warning icon, will be shown against such invoices on the PO listing page.

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.

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.*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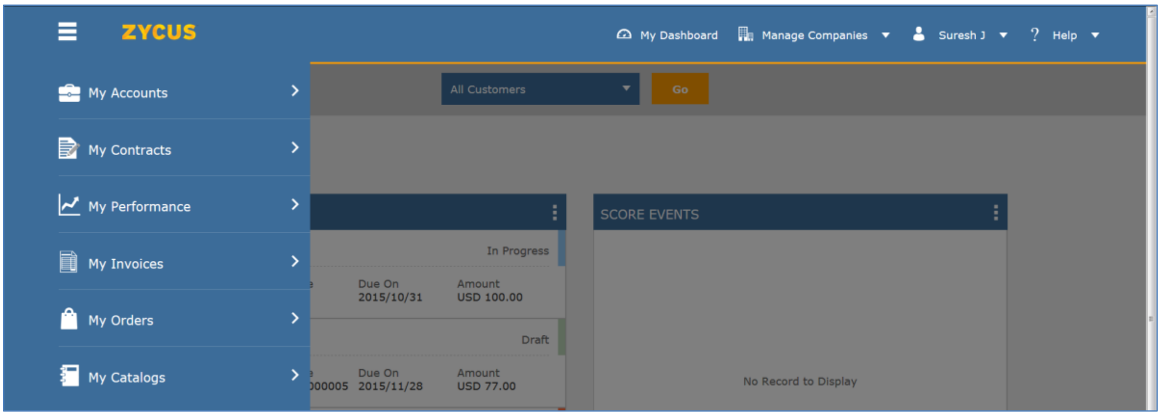
# Chapter 6: What is a Side Panel?

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.**

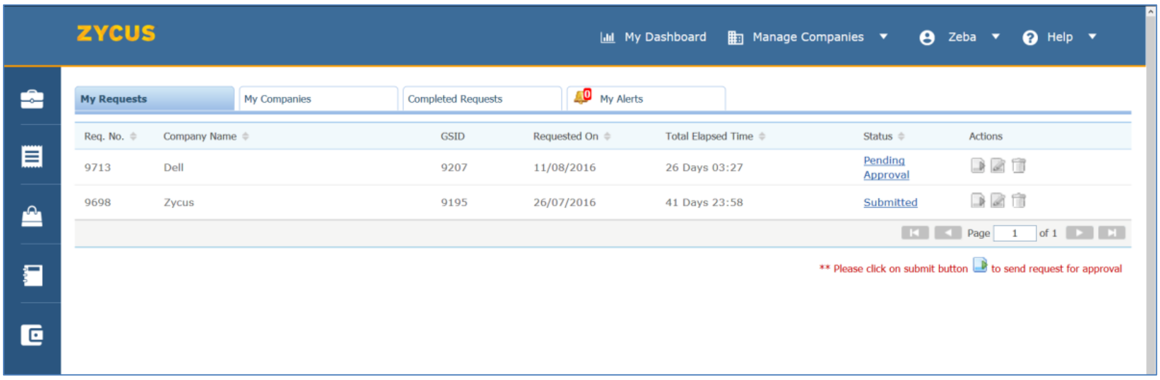
**My Accounts** tab consist of views like:

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

1. **My Requests** tab:

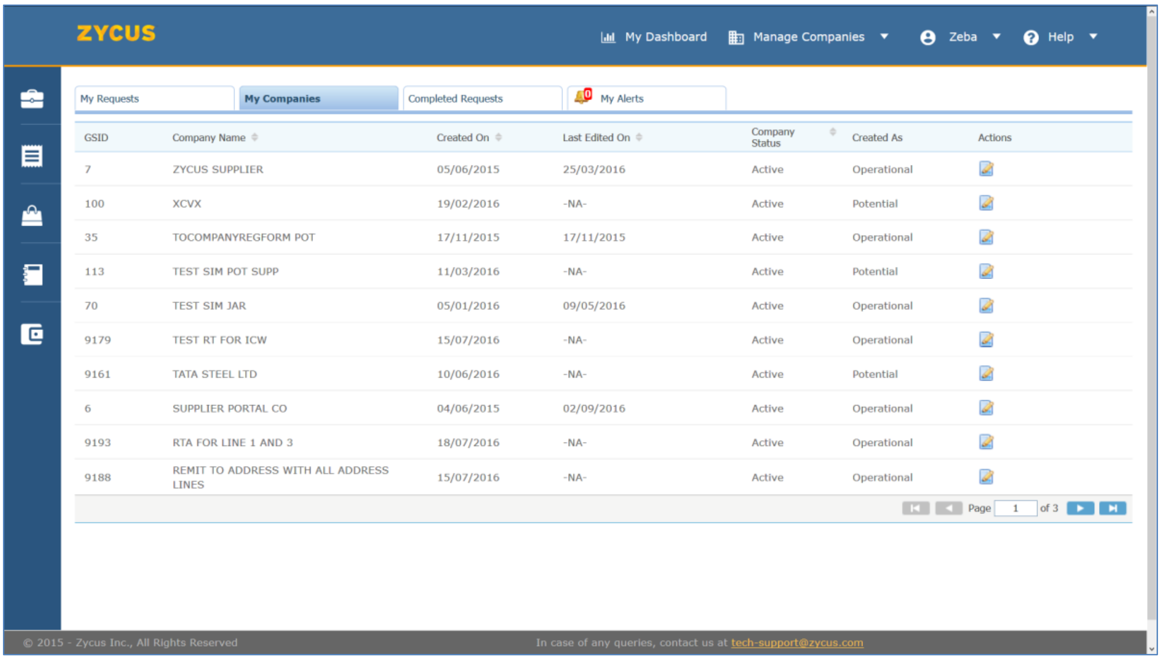
    a. **Submit** Requests
    b. **Edit** Requests

c. **Delete** Requests

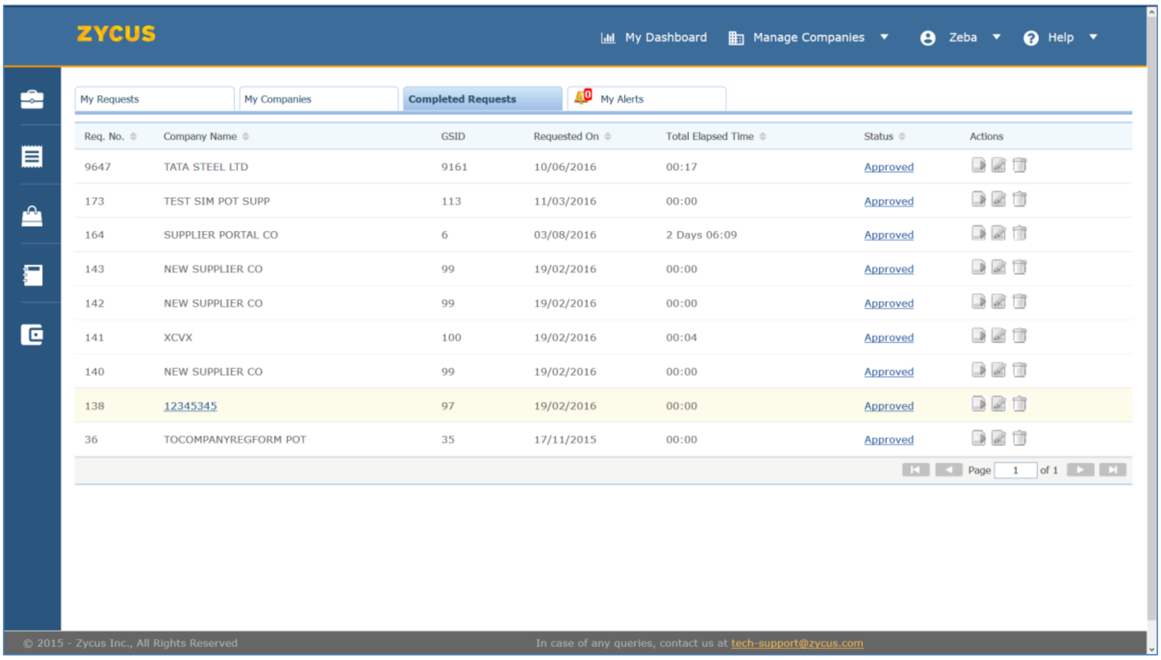



2. **My Companies** tab:

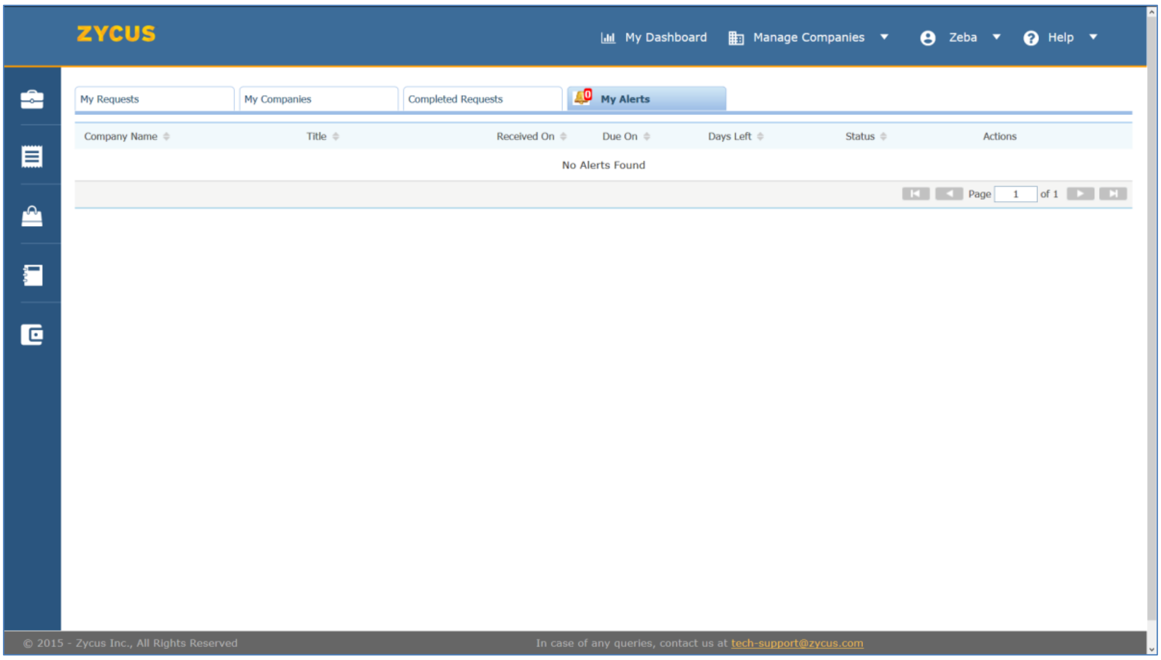
a. Edit Company Details




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***

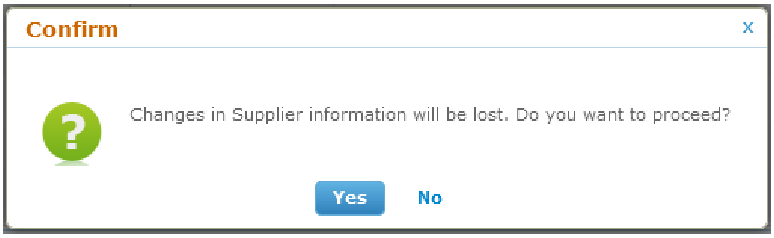
3. Click on the icon corresponding to the required supplier company.

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.*

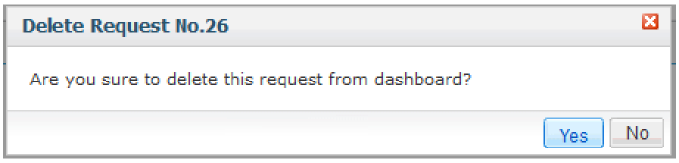
### *6.2.2.3 How to Delete a Request?*

**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.*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### 6.2.3 My Companies

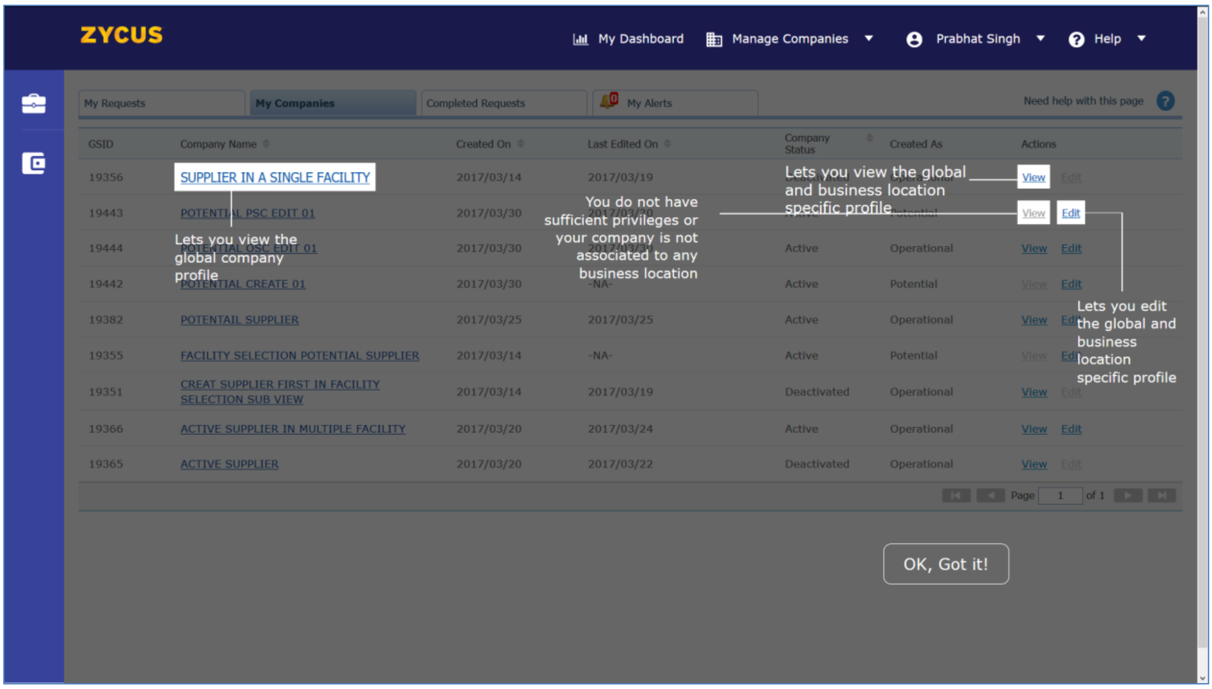
The **My Companies** tab allows the user to view the current on-boarded supplier companies.

#### *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

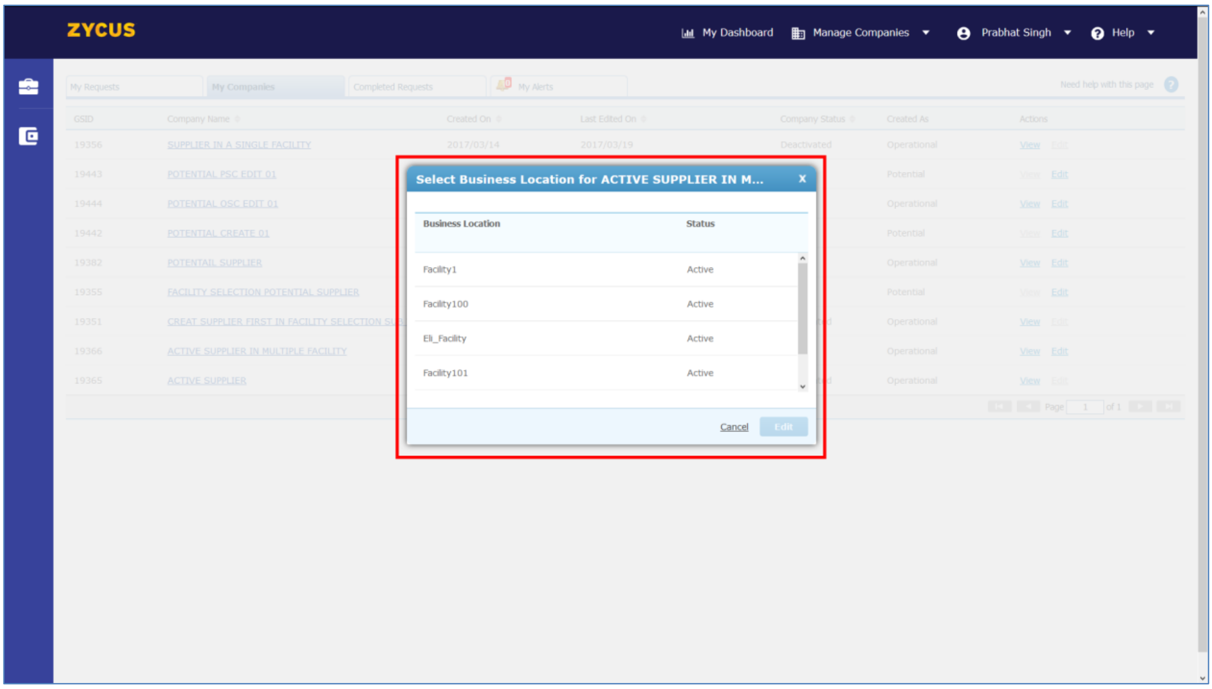
2. Navigate to the **My Companies** and look for the required Supplier Company




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.

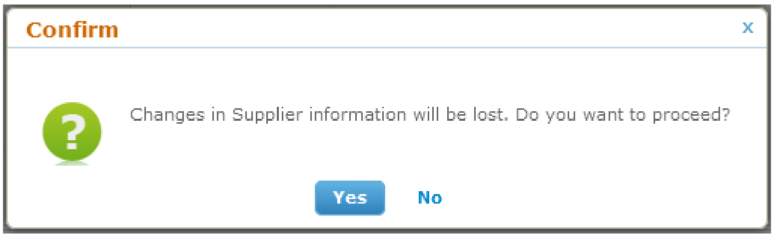



5. Make the required changes in the Supplier Company.

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:

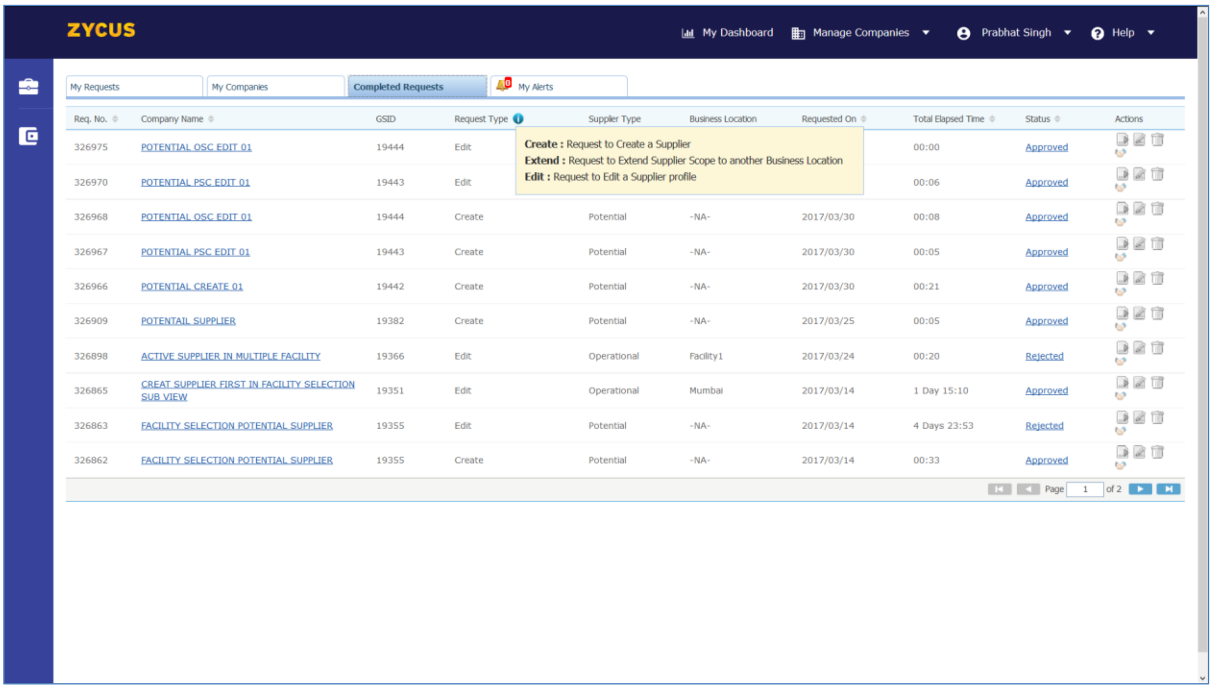



Click **Yes** to discard changes made and exit. Click **No** to keep the changes made and return to editing.

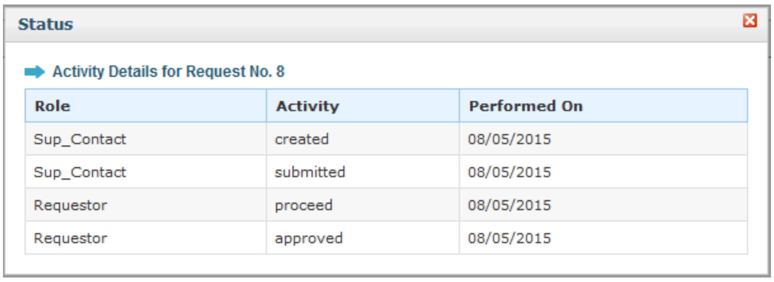
*Only Supplier Company Registration requests under the Users scope can be edited.*

### 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.



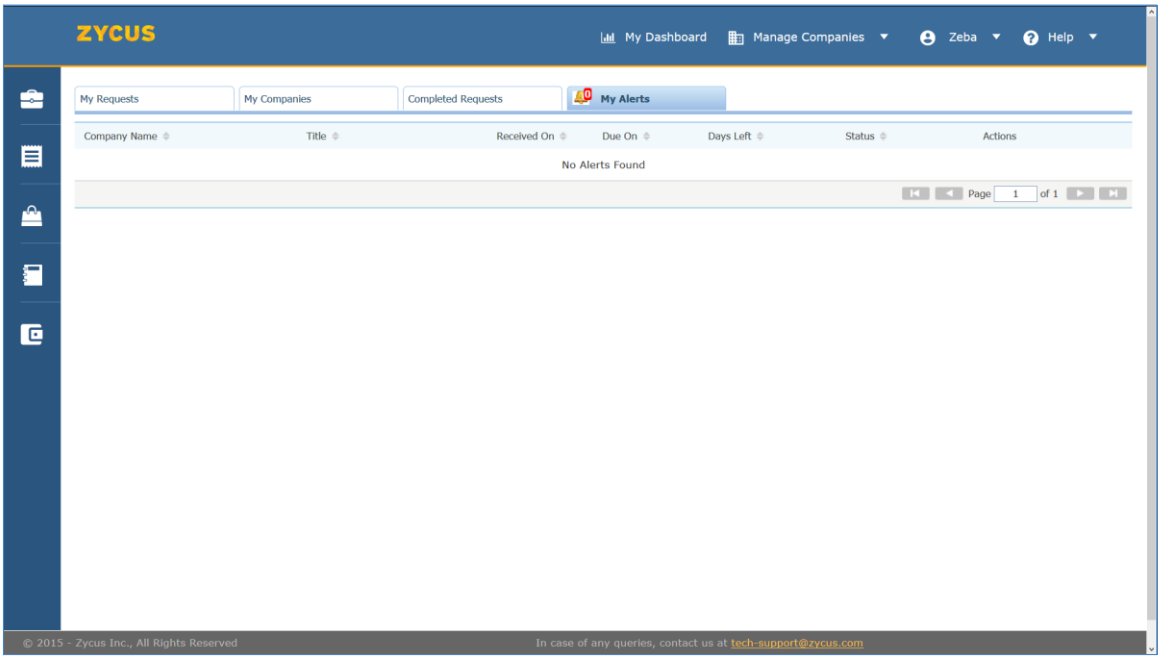
**Status**

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.



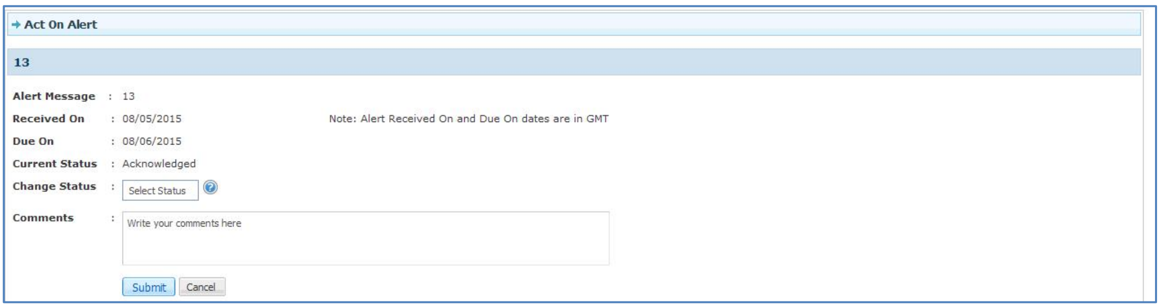

### 6.2.5.1 *How to Act on an Alert?*

**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 Act 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.

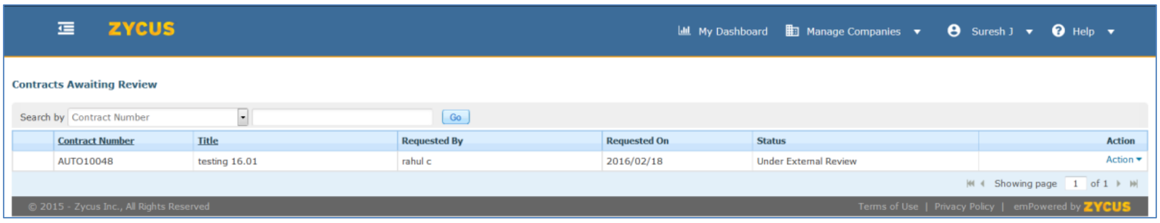
## 6.3 My Contracts

***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.

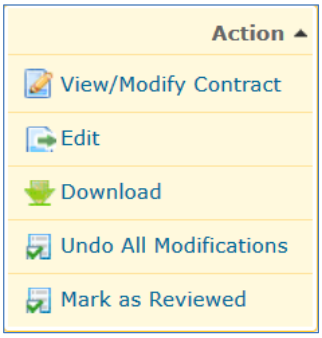
1. Click on **My Contracts**. You will get an option of **View Contracts**.
2. Hover over **View Contracts**, you will be able to see list of customer company whose contracts you want to see.


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

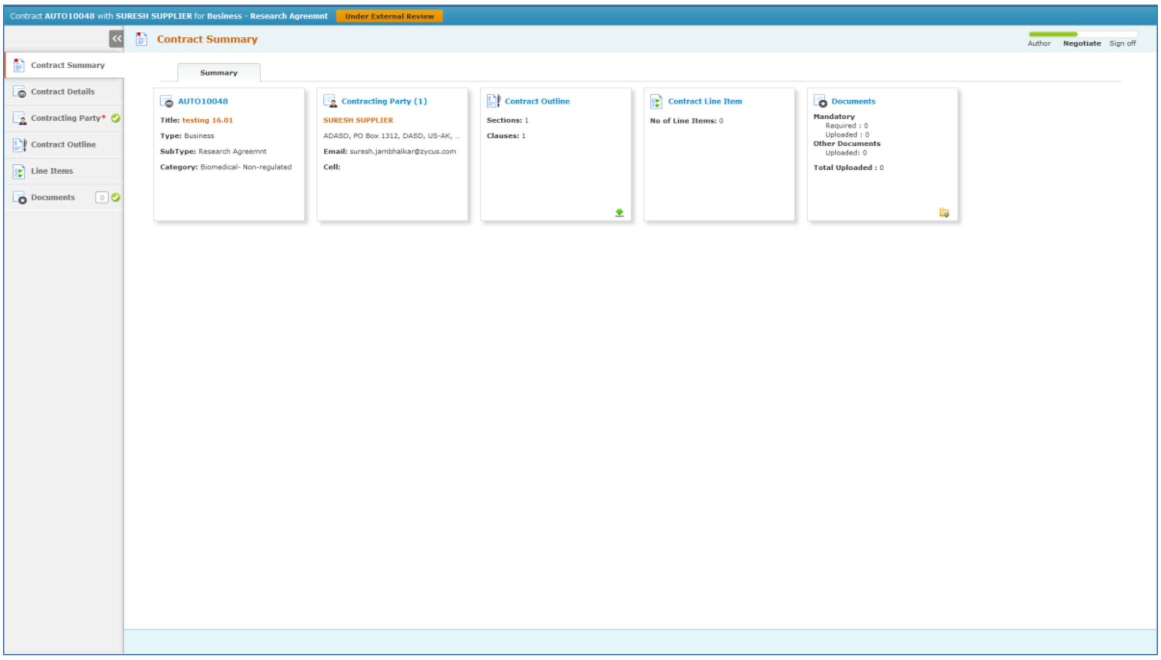



4. You can search for contracts awaiting review by Contract Number or Contract Title.

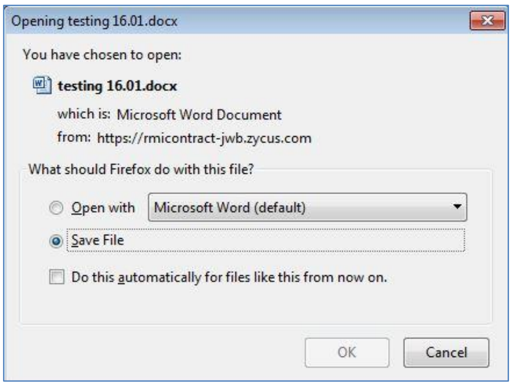

5. Against any contract number, click on the Actions drop-down menu. You will get following options:



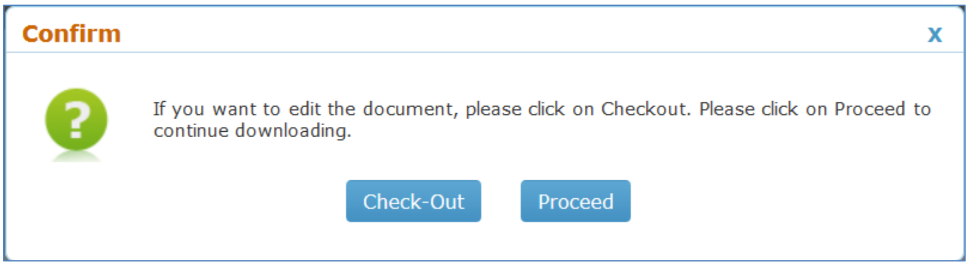

6. You can view or modify contract. You will be navigated to authoring contract page in a new window.




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:

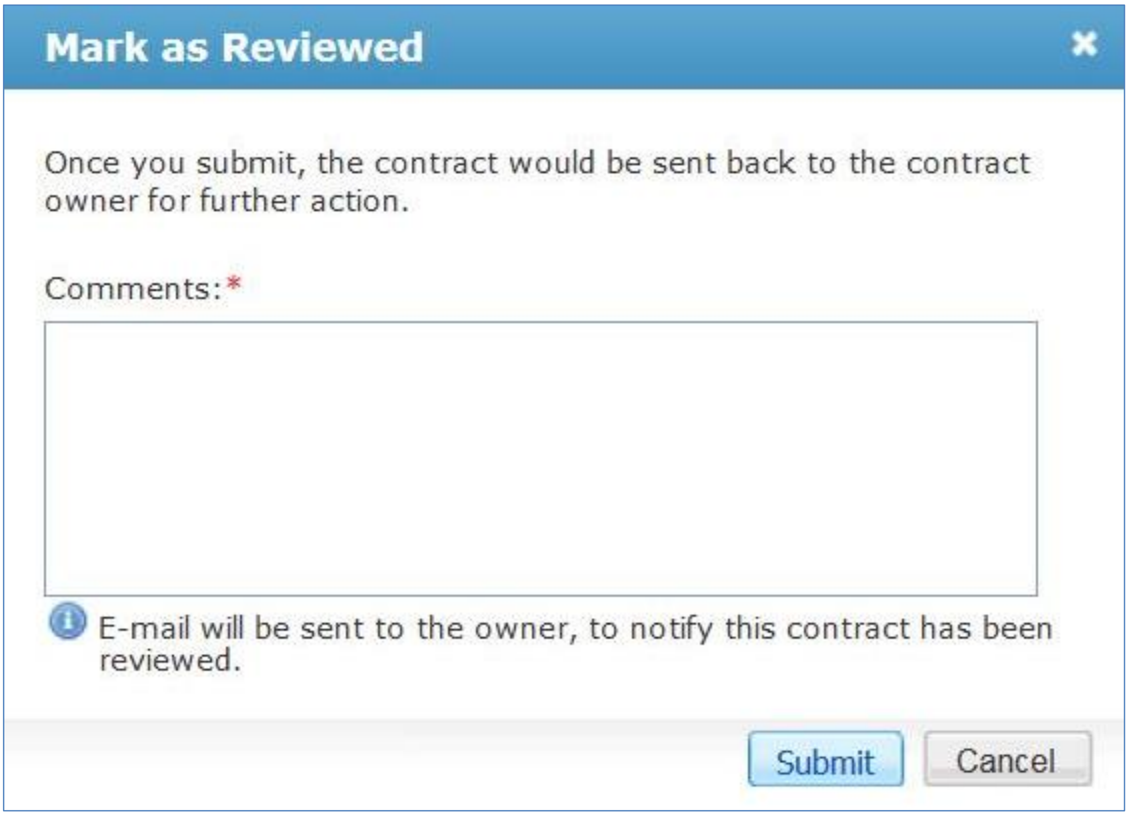



You can click proceed or check-out.

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.



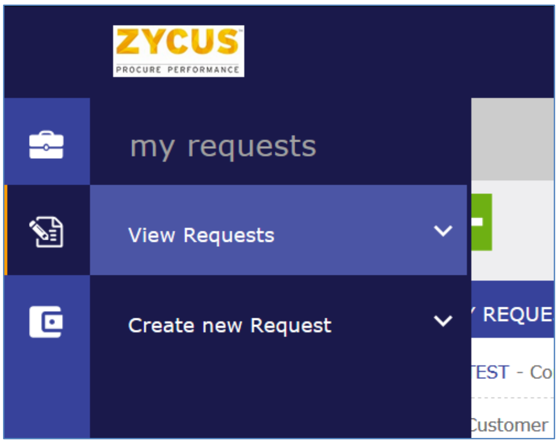

11. Enter your comments as per your review and click **Submit**. The contract owner will be notified through an email.

## 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.

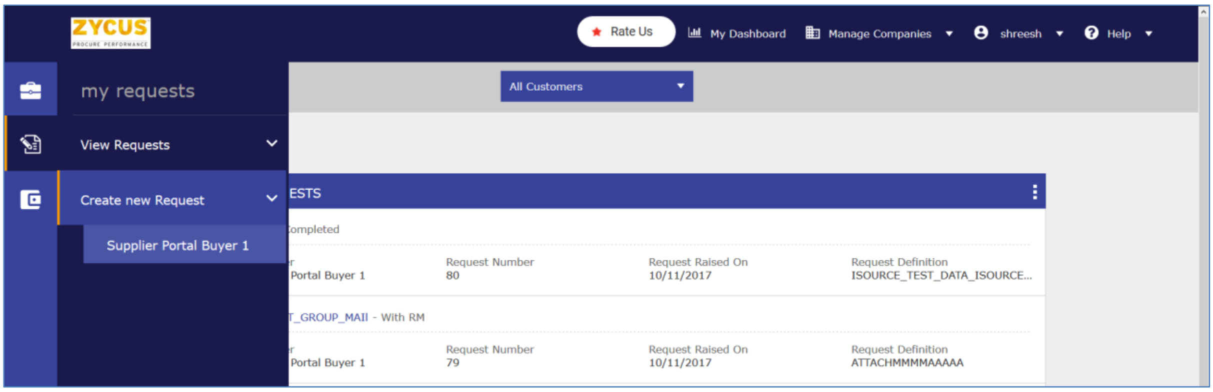
My Requests option allows the user to:
1. Raise a new request
2. View the status of requests



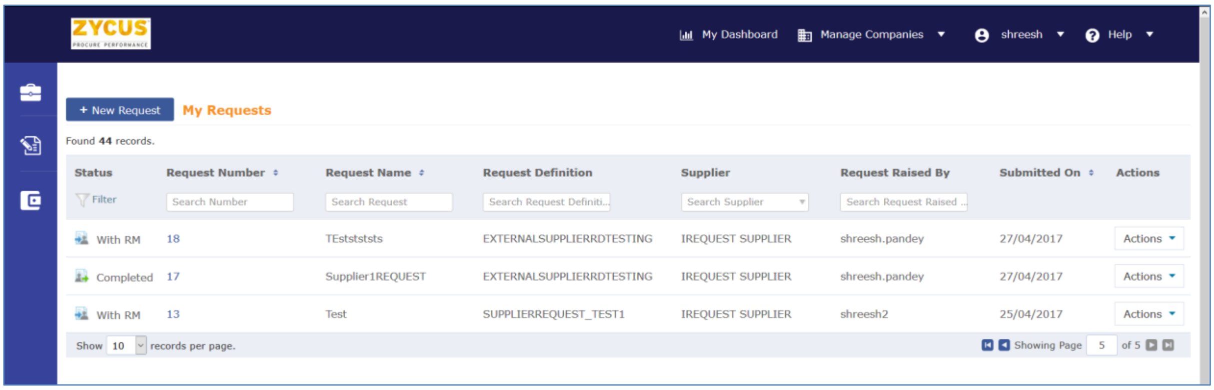

### 6.4.1 How to Raise a Request?

To raise a request, go to:

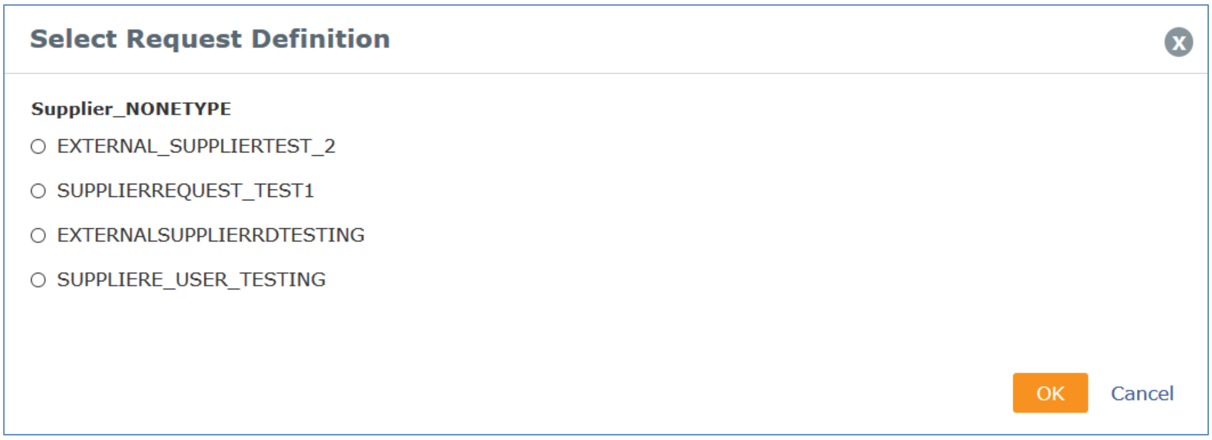
1. Side Panel > My Request > Create New Request > select the buyer company.



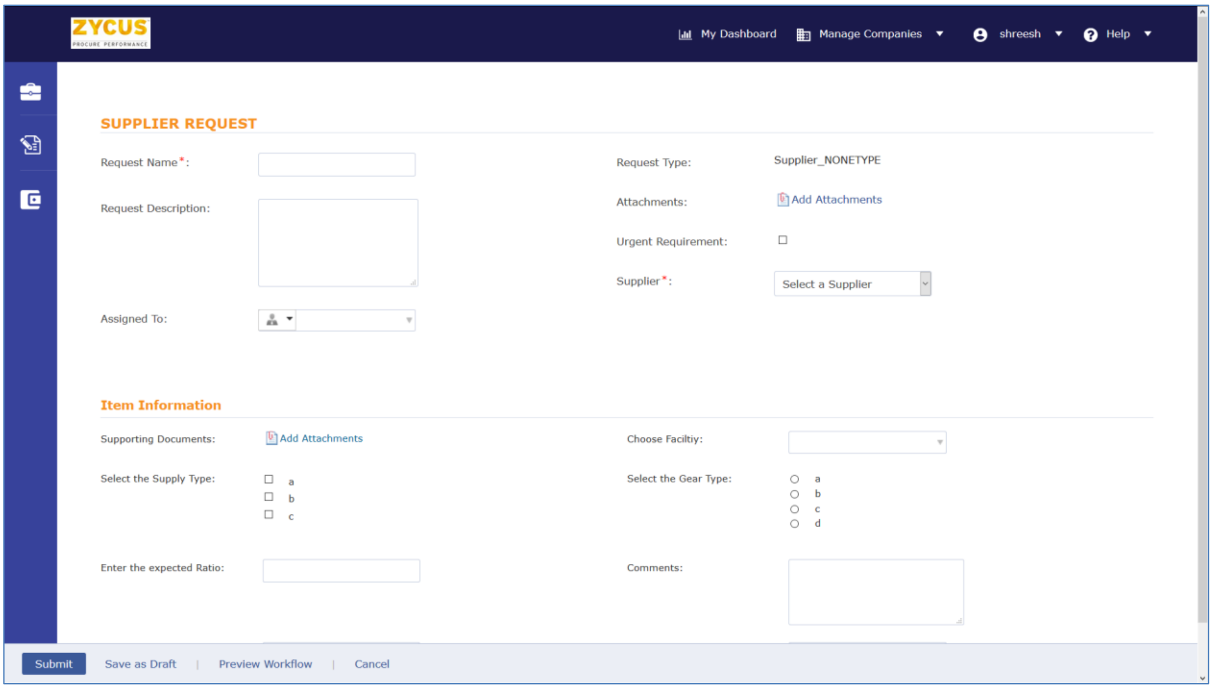

2. You will land on the following page:




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.

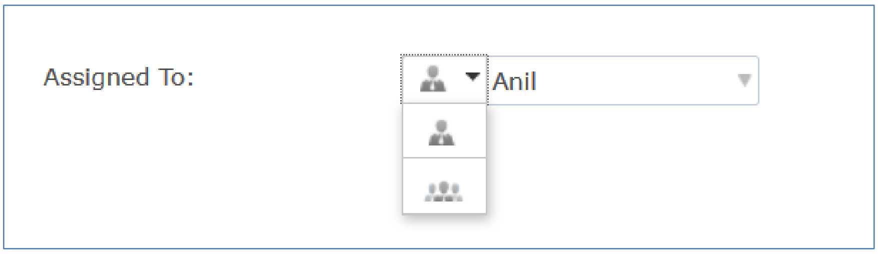



5. On select the request definition, you will land on the following page:



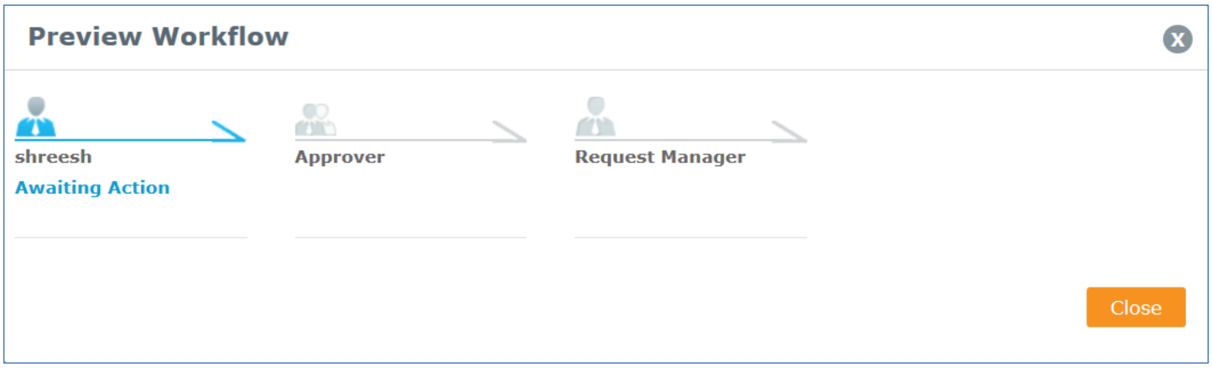
**Section One:**

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.

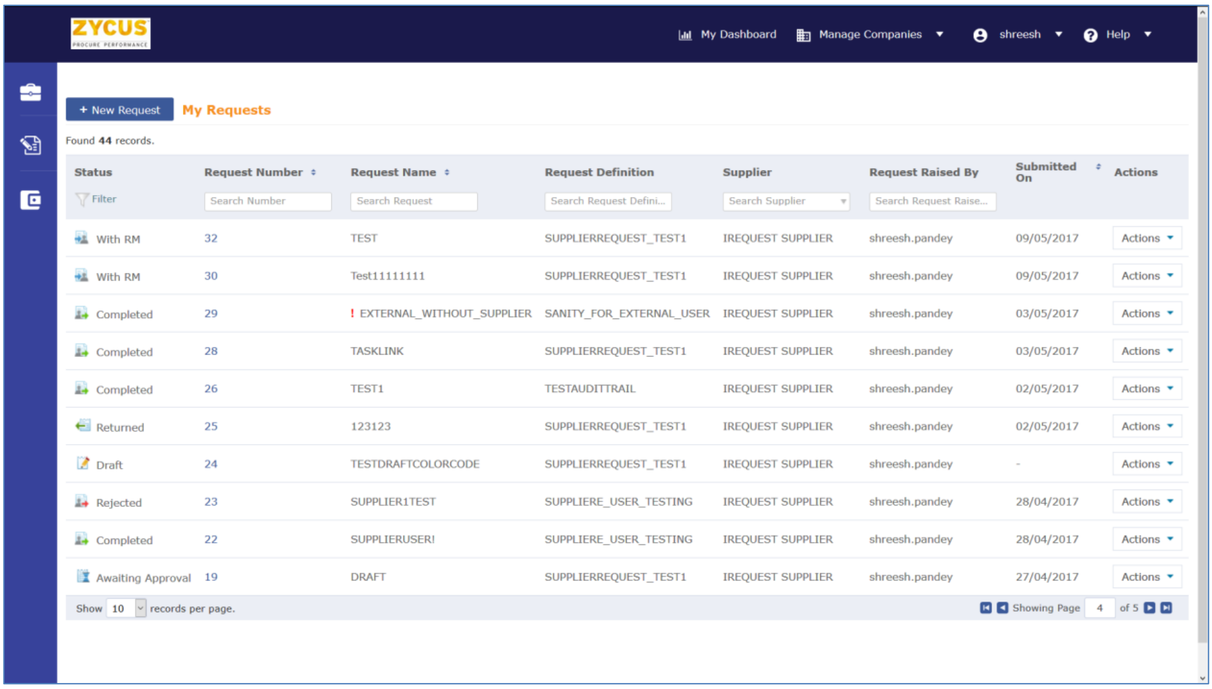



**Section Two:**

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:

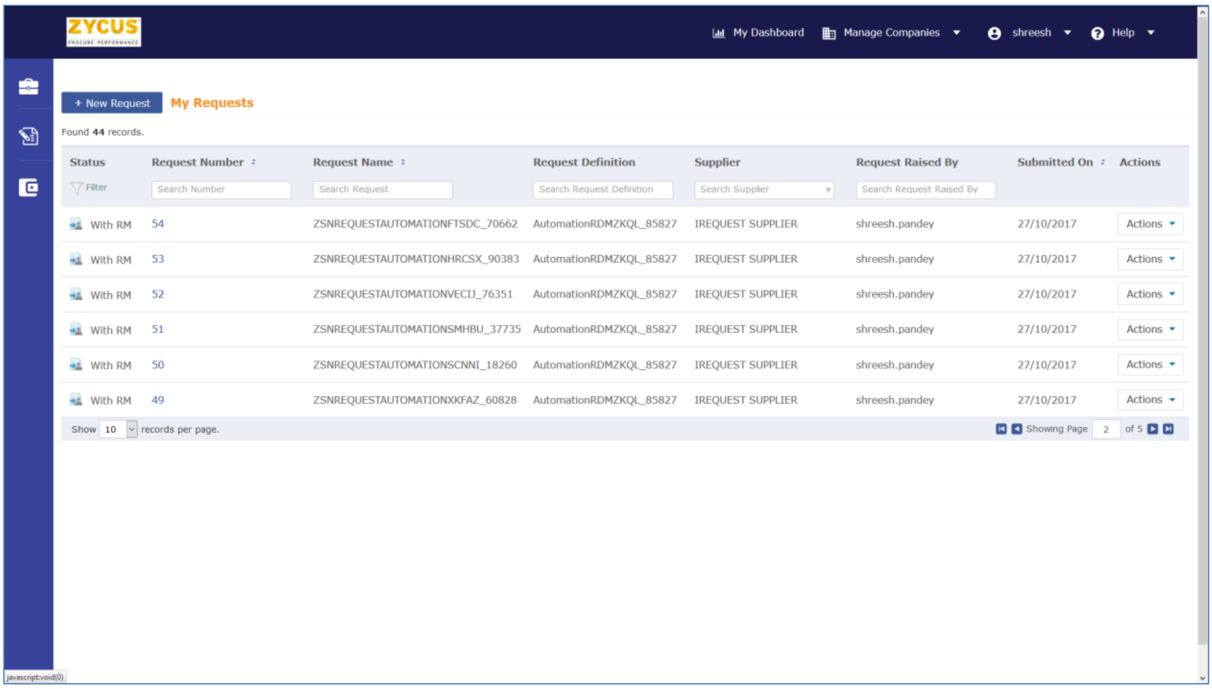



6. Once all the information is in place, you can either **Submit** the request or **Save it as Draft**.
7. Saving it as draft will allow you to work on it later. Once you hit Submit, the workflow will be triggered, and you won't be able to make any changes.
8. Such requests will be visible on the **My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

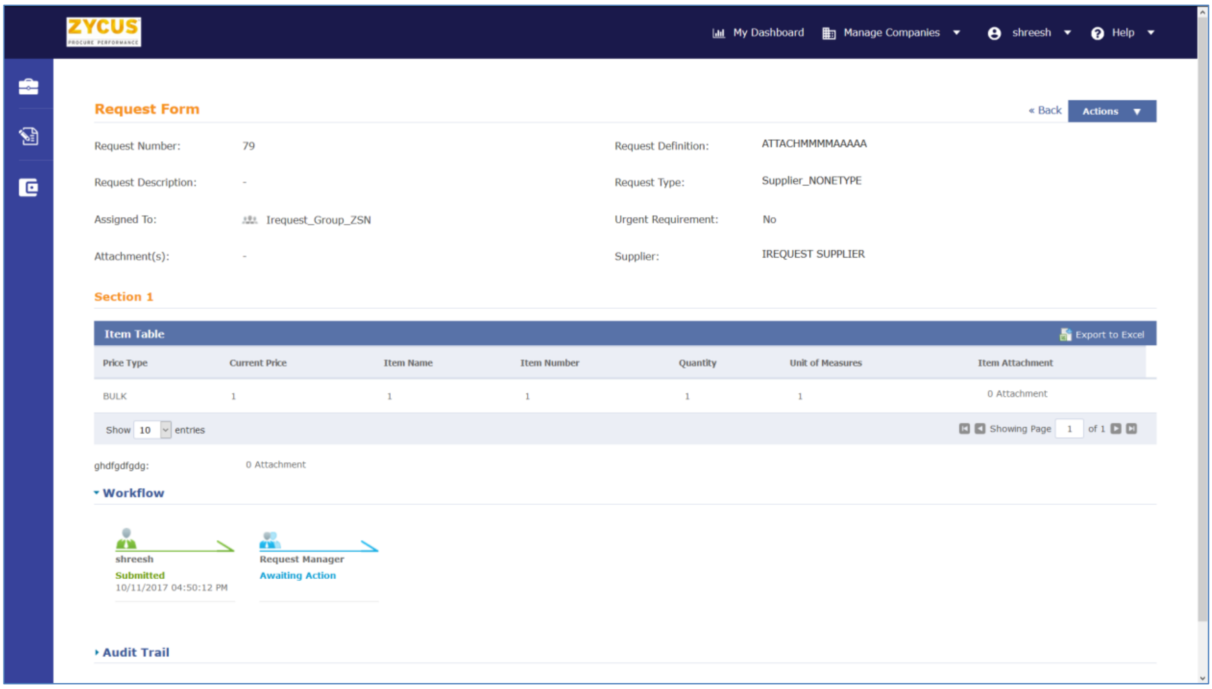



## 6.4.2 How to View the Requests?

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:

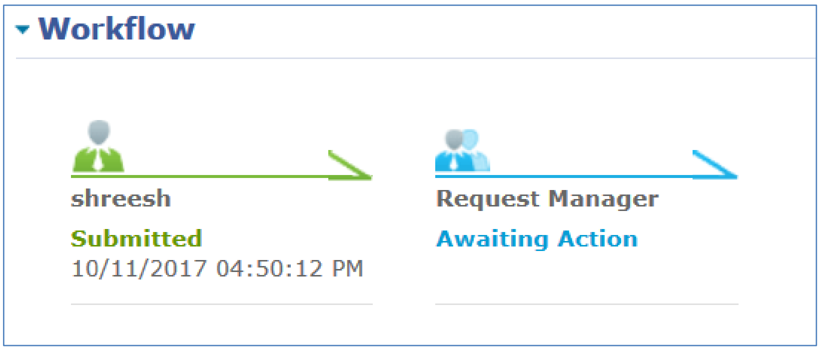



2. On this page, you will see the requests by all the users raised from your organization.
3. For the requests which are in Draft status will be editable.
4. To view a request, click the **Request Number**. You will land on the following page:

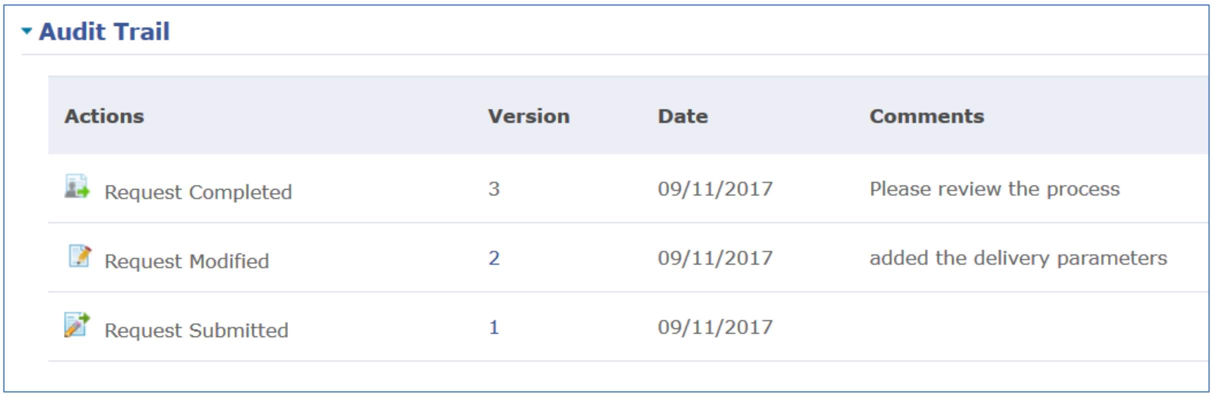



**Note:** All the sections and their field (except **Workflow** and **Audit Trail)** will vary depending on your buyer company.

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.




| 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 | |

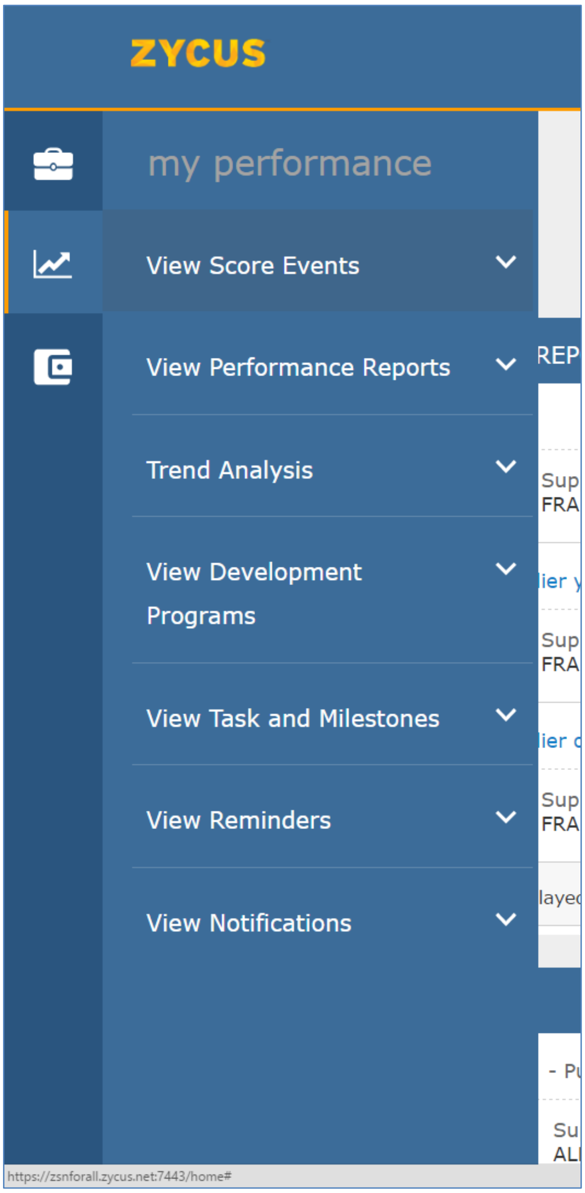
## 6.5 My Performances

***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?

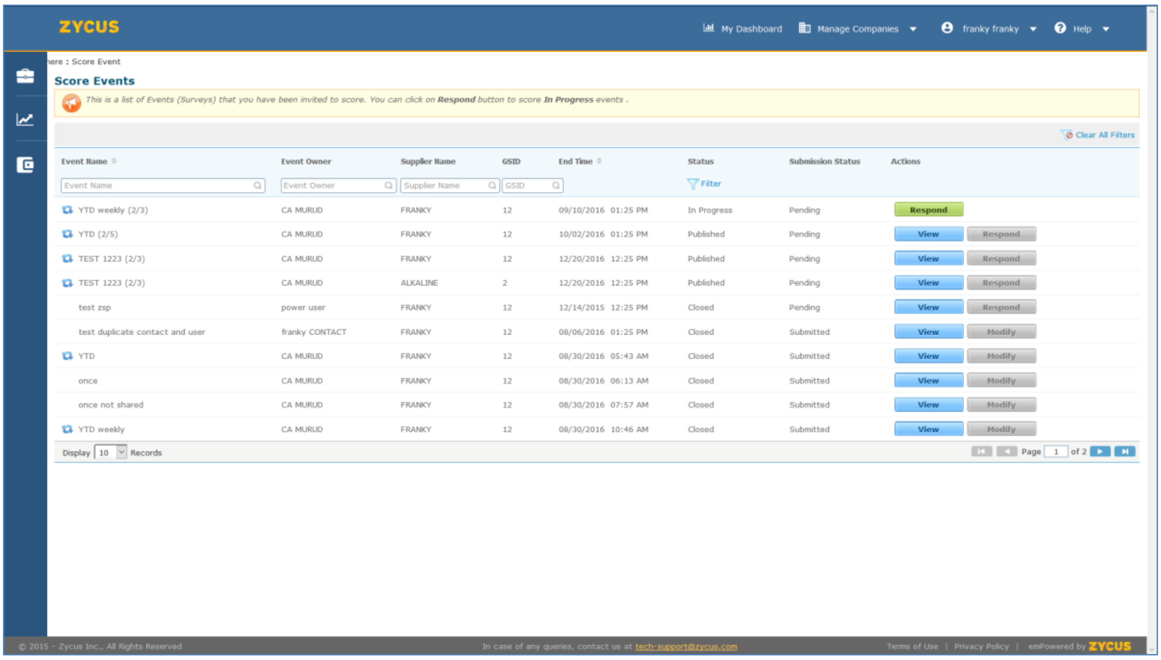
Under **My Performance**, hover over **View Score Events**. A list of Customer Company will be provided. Select the customer company of your choice for whom you want to score the event.

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

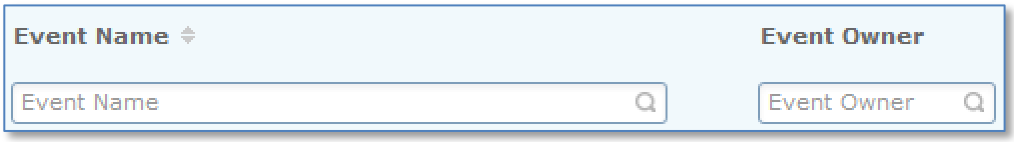
#### *6.5.1.1 Scoring Events Online*

***To score an event online:***

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

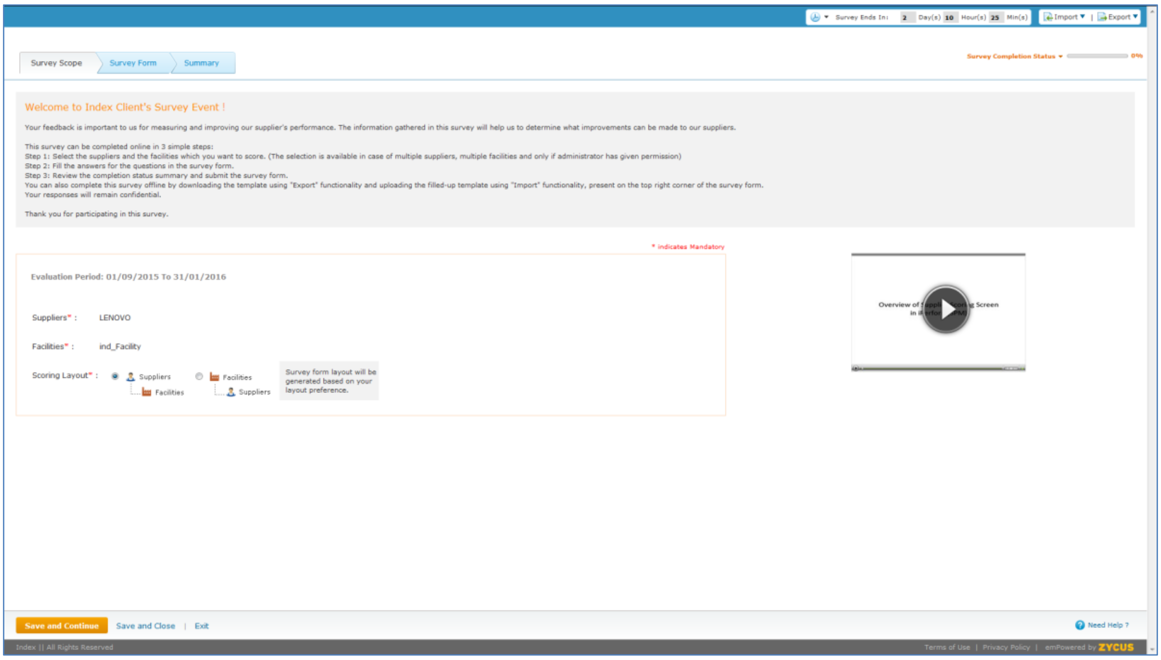



2. Search for the required event using the **Event Name** and/or the **Event Owner** search box.

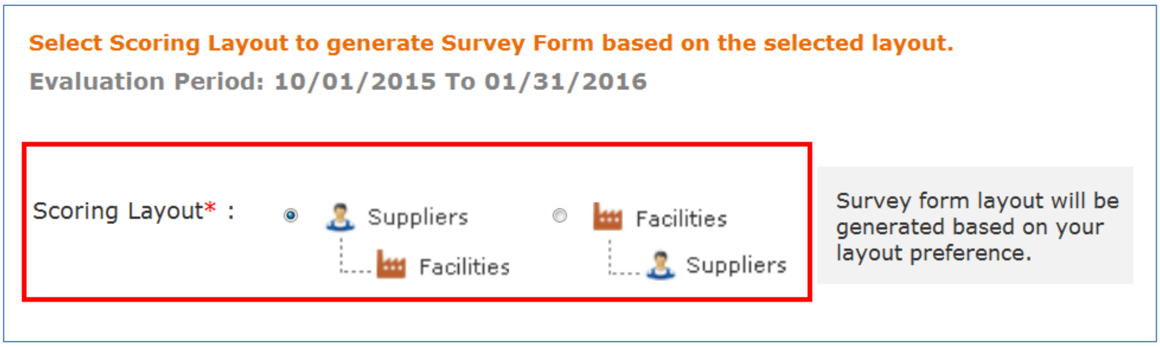



3. Click on the **Respond** button in the **Actions** column for the corresponding event to open the survey.

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

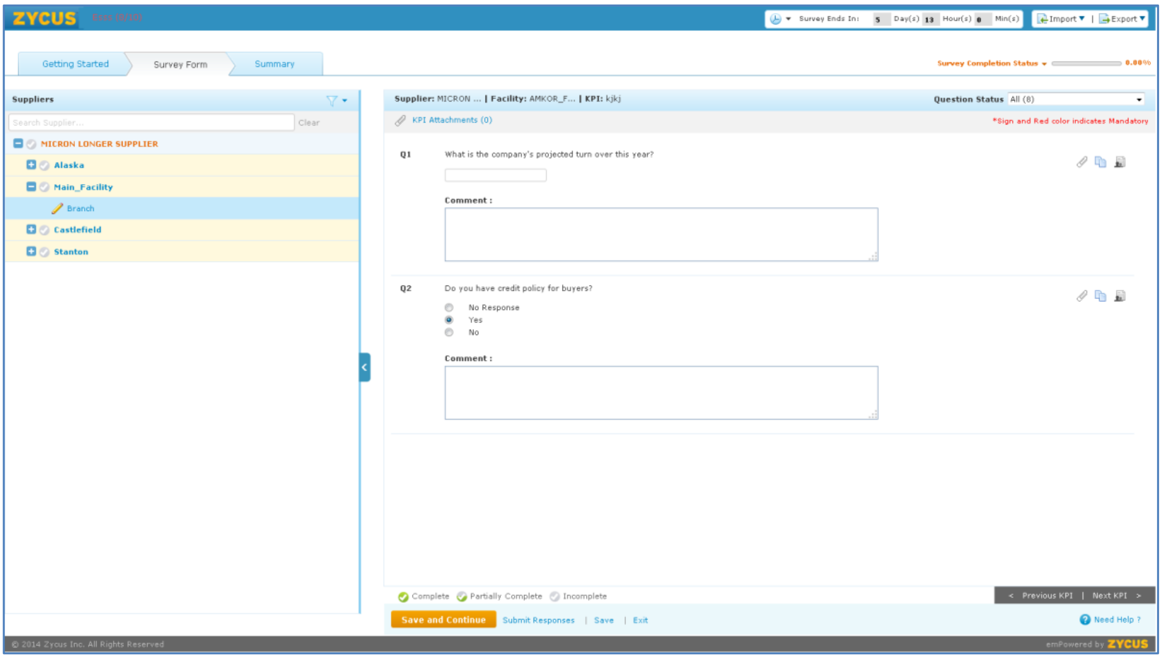



5. Select the **Scoring Layout** from the given options:




| Layout | Description |
|---|---|
| Suppliers<br>Facilities | Select the **Suppliers to Facilities** layout to score a supplier linked to multiple facilities. |
| Facilities<br>Suppliers | Select the **Facilities to Suppliers** 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.

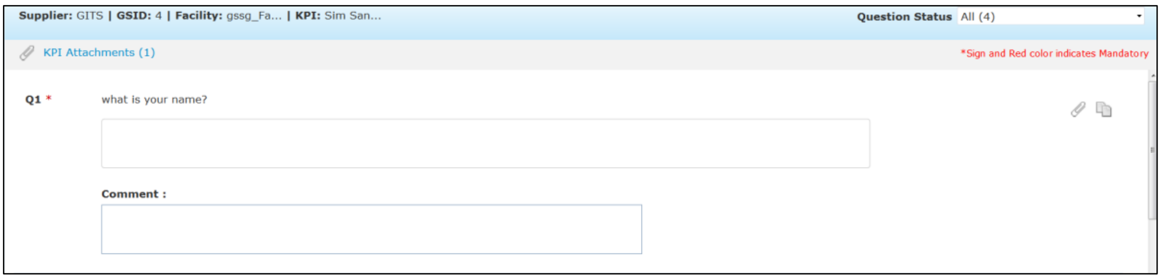
8. Select the required KPI from the list of KPI’s displayed. The list of questions associated with the KPI will be displayed.

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.


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.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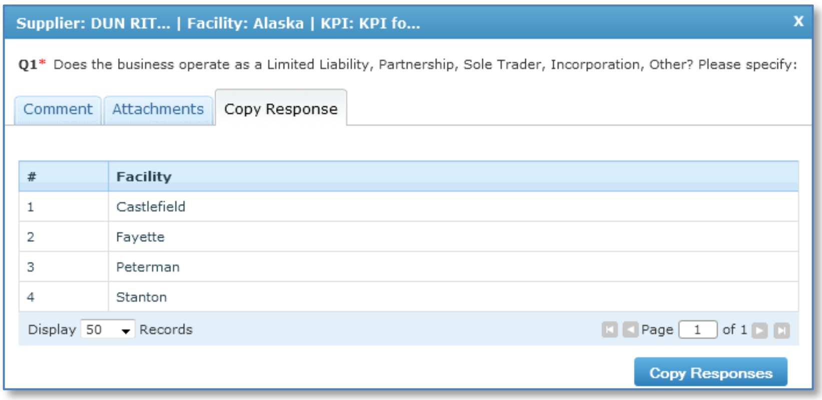


iii. Click on the **Copy Responses** button to copy the response for the question to a survey for another facility/supplier.

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.


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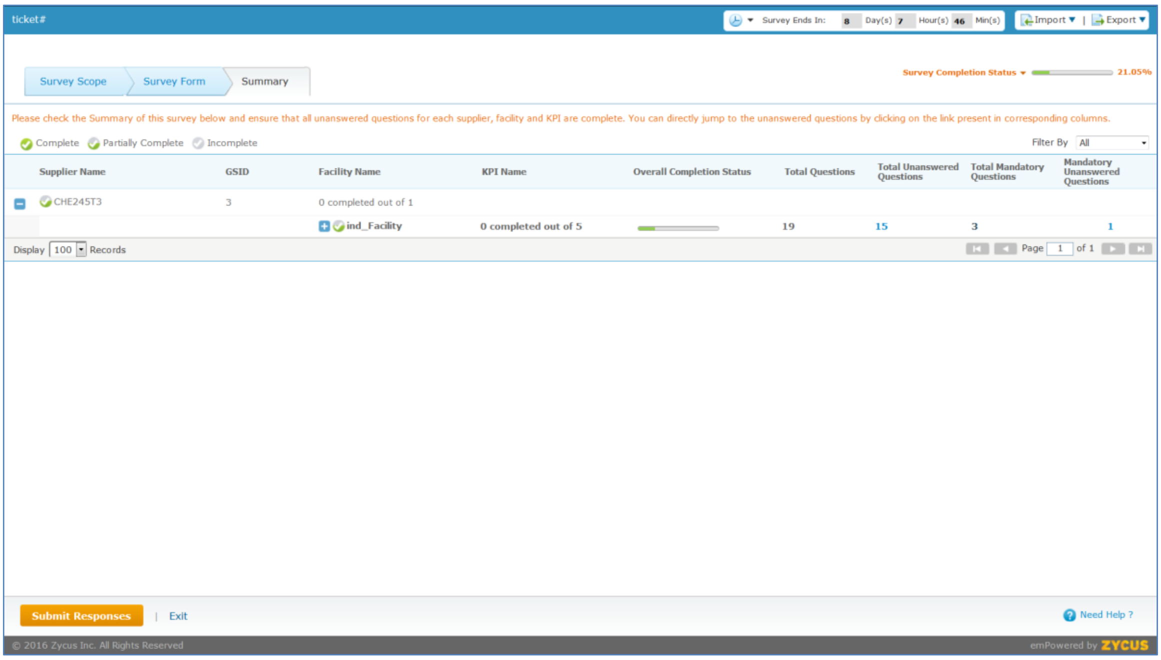
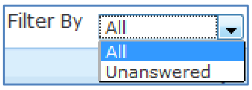
14. The **Summary** tab is displayed which displays completion status of the survey at Supplier, Facility & KPI level.

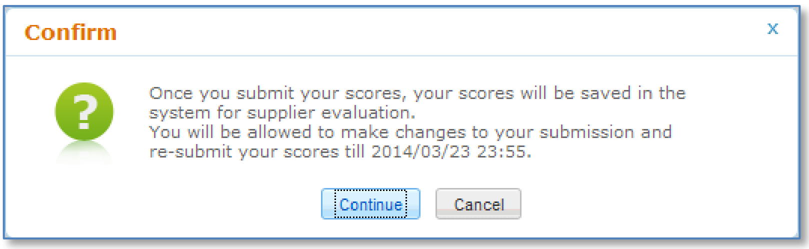



To filter the summary, use the **Filter By** dropdown box located on the top right of the **Summary** tab.




***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.

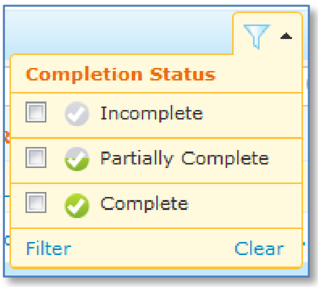


16. Click **Continue**. The scores are submitted, and the **Score Events** page is displayed.

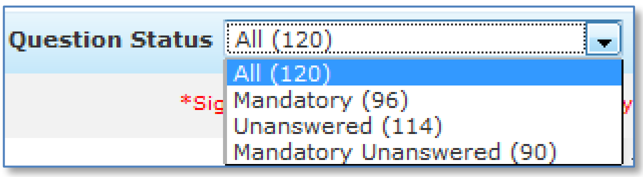
At any point in the survey, you can click on "**Exit**" button to exit the survey with following three options:

- **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.

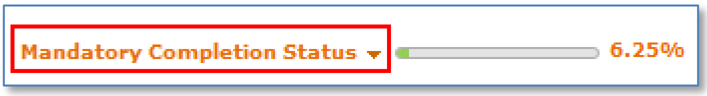
To filter the KPI's in the Suppliers/Facilities module, click on the icon, select the required option and click on the **Filter** link.




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.

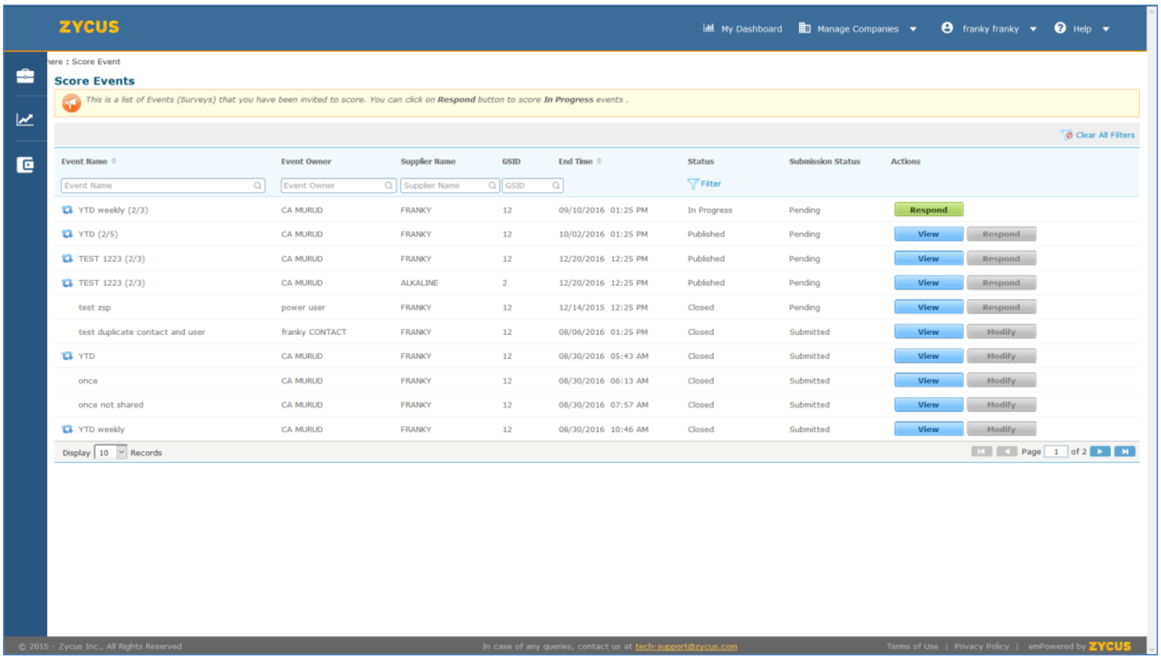



#### 6.5.1.2 Scoring Events Offline

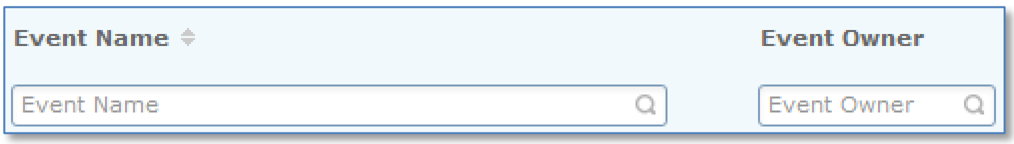
### *To score an event offline:*

Follow the steps mentioned below to the 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:

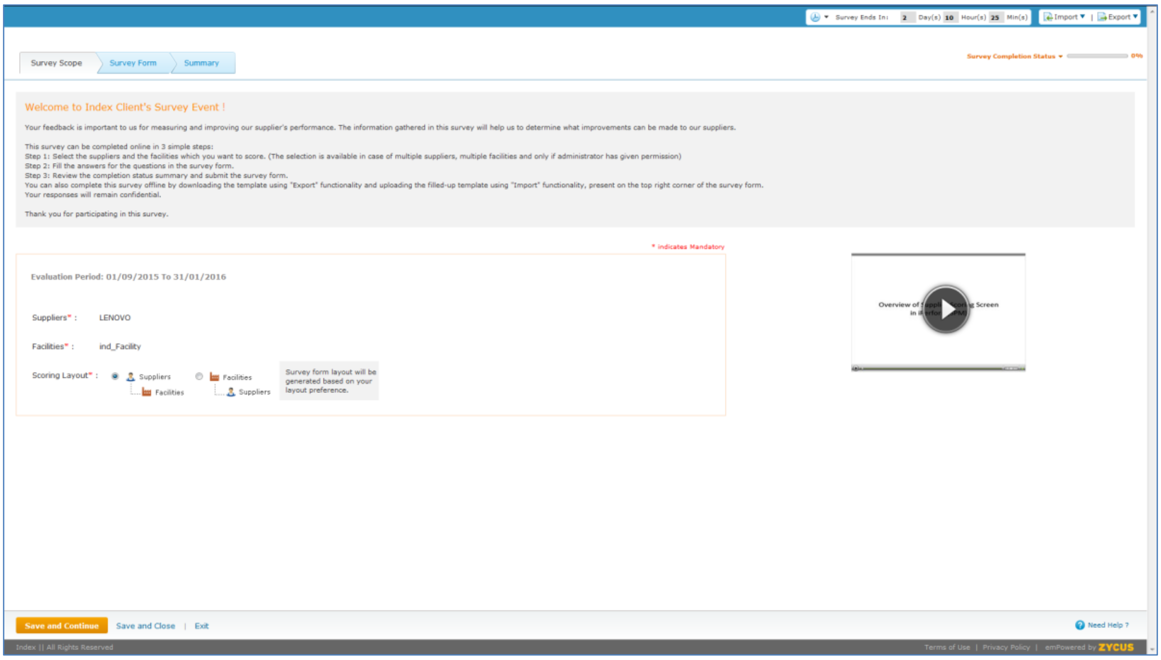



2. Search for the required event using the **Event Name** and/or the **Event Owner** search box.



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

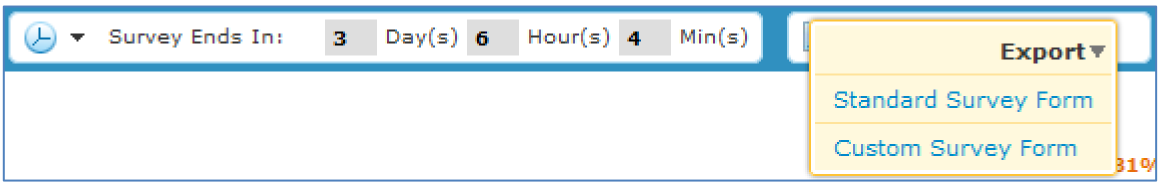
4. The survey page is displayed with the **Survey Scope** tab open.




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

| Layout | Description |
|---|---|
| Suppliers<br>Facilities | Select the **Suppliers to Facilities** layout to score a supplier linked to multiple facilities. |
| Facilities<br>Suppliers | Select the **Facilities to Suppliers** 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.





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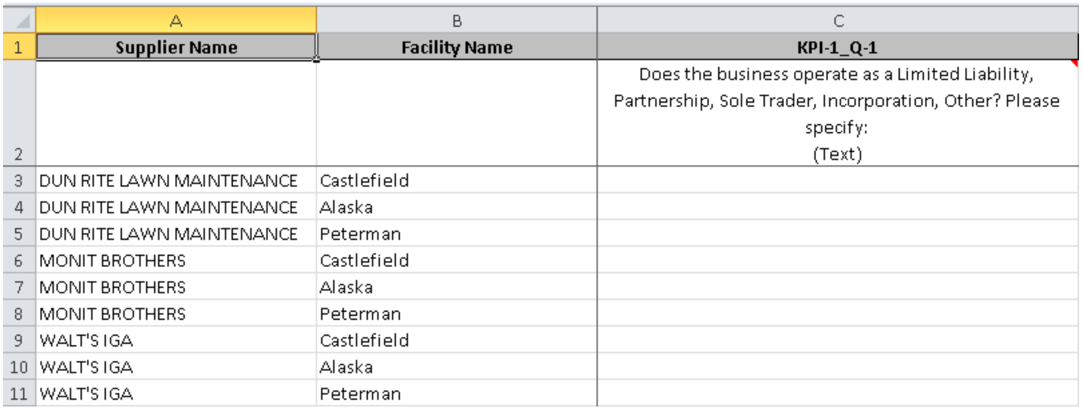
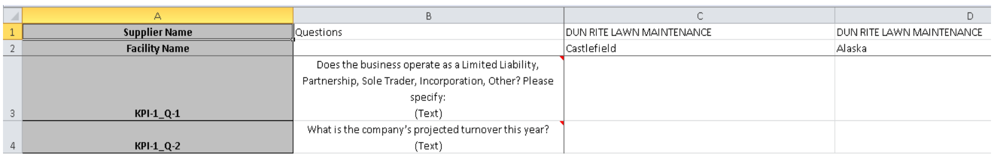
***Note:*** *In case there are more than 200 suppliers in an Event, users can score suppliers only through offline scoring.*

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

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

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

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



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

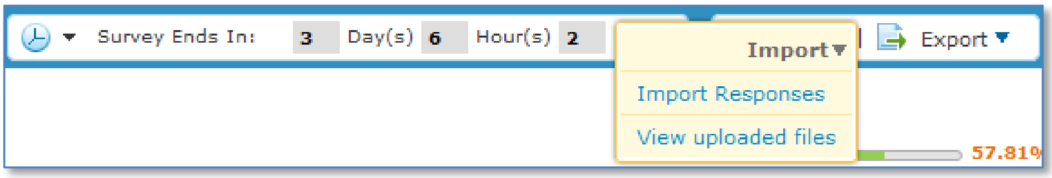
***Note:*** *The "**Responses**" worksheet is password protected.*

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

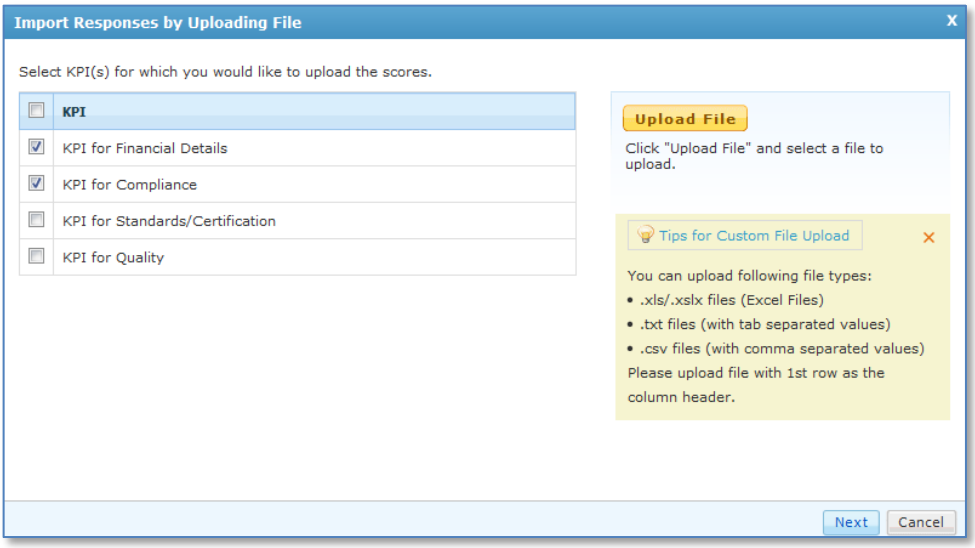
***Note:*** *User can add or delete a row/s from the worksheet by unprotecting it using the password specified in the **Instructions** sheet.*

***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**.

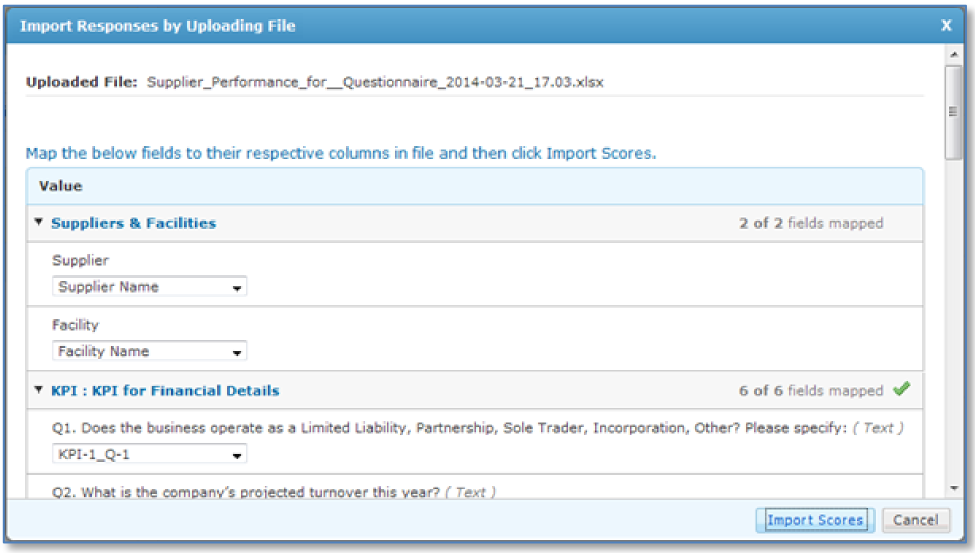


10. The **File Upload** dialog box is displayed. Browse and select the required file.

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.*




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.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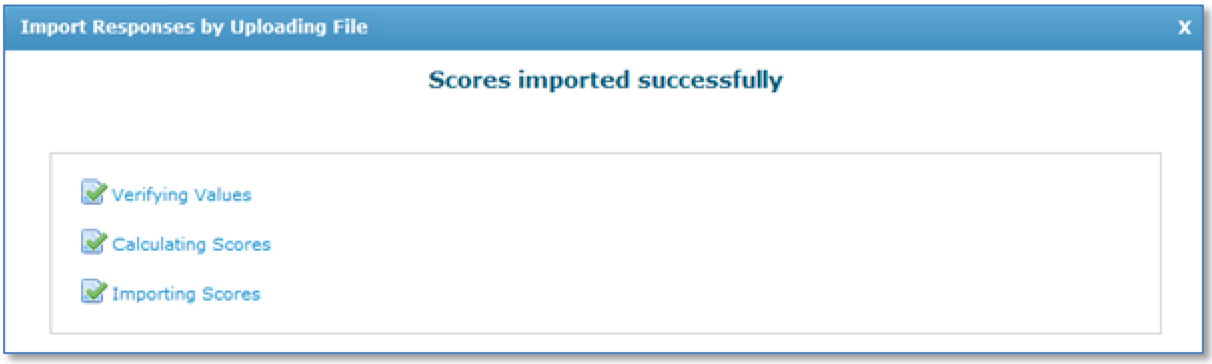
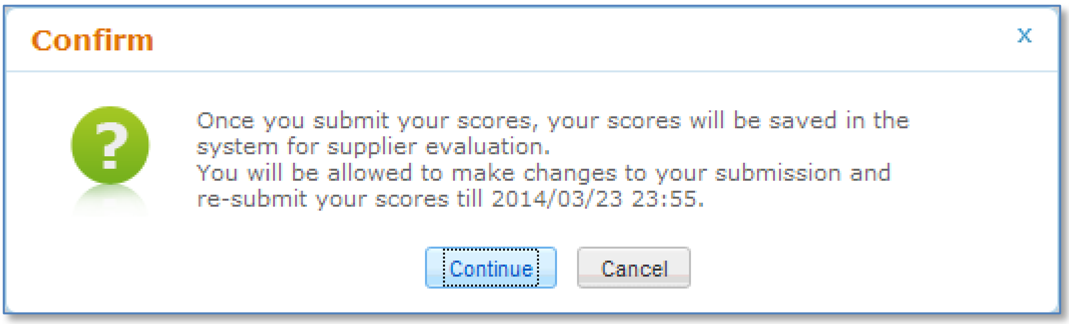



16. Click on the **Import** tab and select the **View uploaded files** link to view attachments, if any, uploaded for your reference.

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:



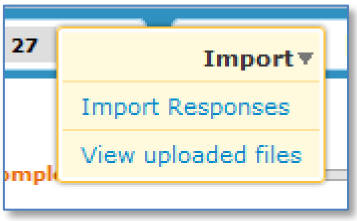

18. Click on the **Continue** button to submit the responses.

#### *6.5.1.3 View Uploaded Files*

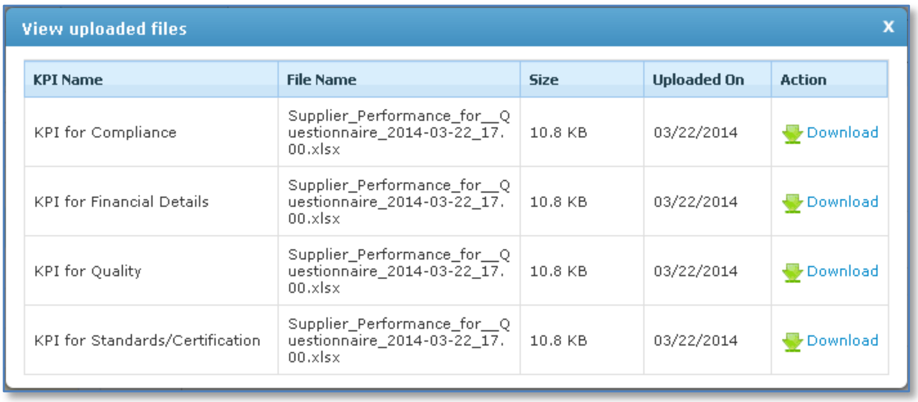
### *To view the uploaded files:*

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.


View uploaded files

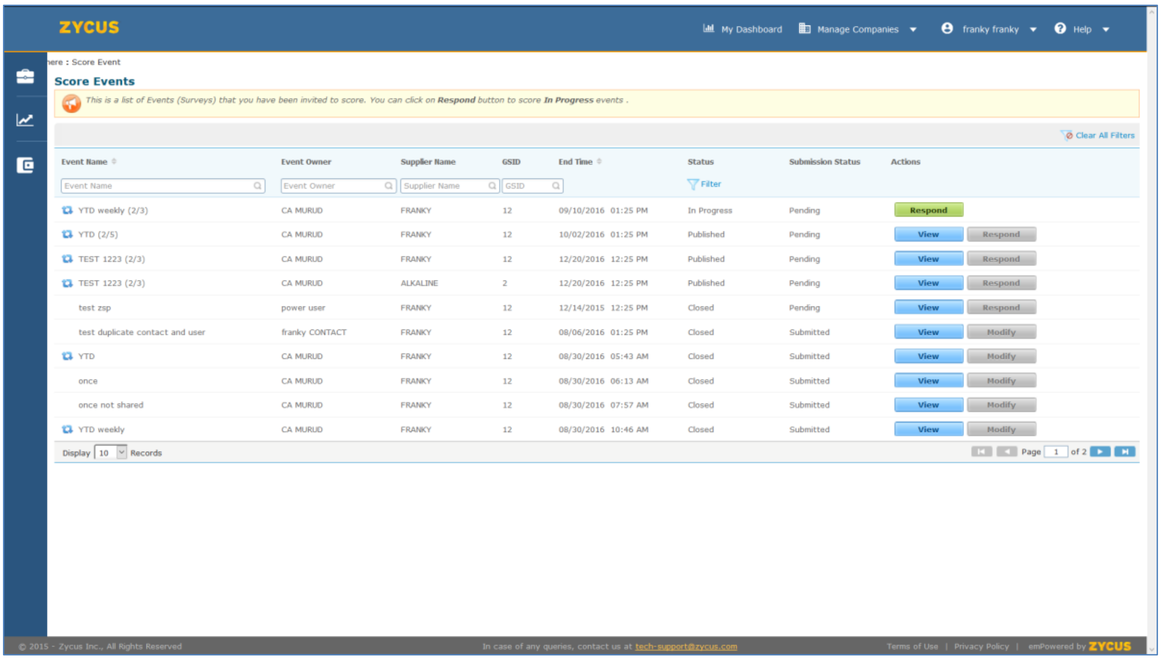
| KPI Name | File Name | Size | Uploaded On | Action |
|---|---|---|---|---|
| KPI for Compliance | Supplier_Performance_for__Questionnaire_2014-03-22_17.00.xlsx | 10.8 KB | 03/22/2014 | Download |
| KPI for Financial Details | Supplier_Performance_for__Questionnaire_2014-03-22_17.00.xlsx | 10.8 KB | 03/22/2014 | Download |
| KPI for Quality | Supplier_Performance_for__Questionnaire_2014-03-22_17.00.xlsx | 10.8 KB | 03/22/2014 | Download |
| KPI for Standards/Certification | Supplier_Performance_for__Questionnaire_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.

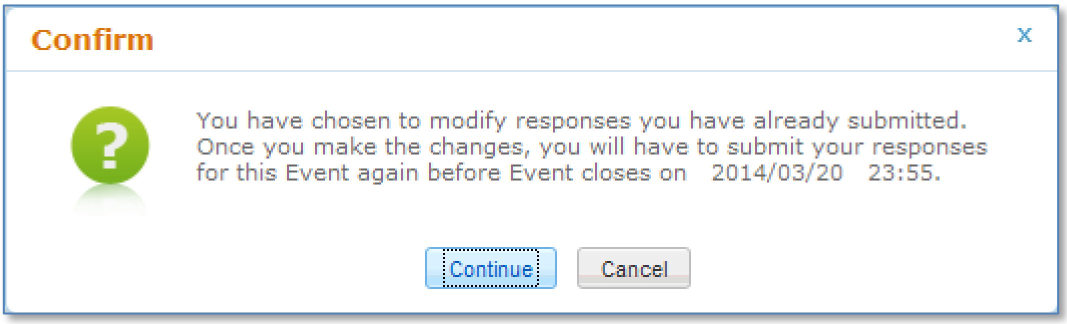
### *To modify responses:*

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 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.



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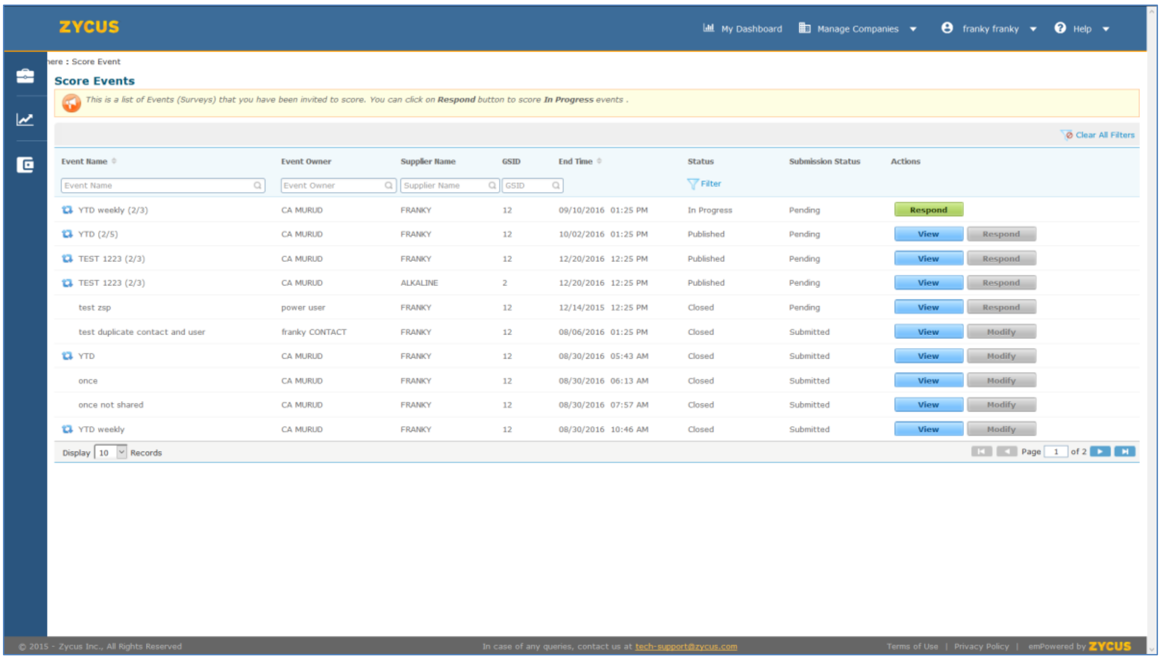
#### *6.5.1.5 Delegate a Scoring Event*

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.

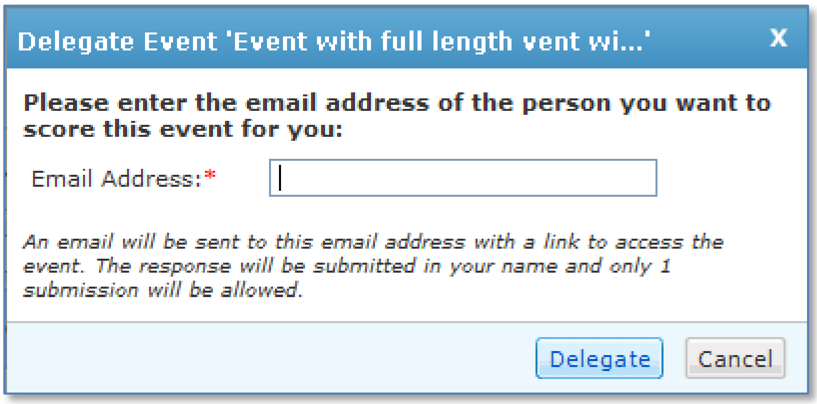
### *To delegate a scoring event:*

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.



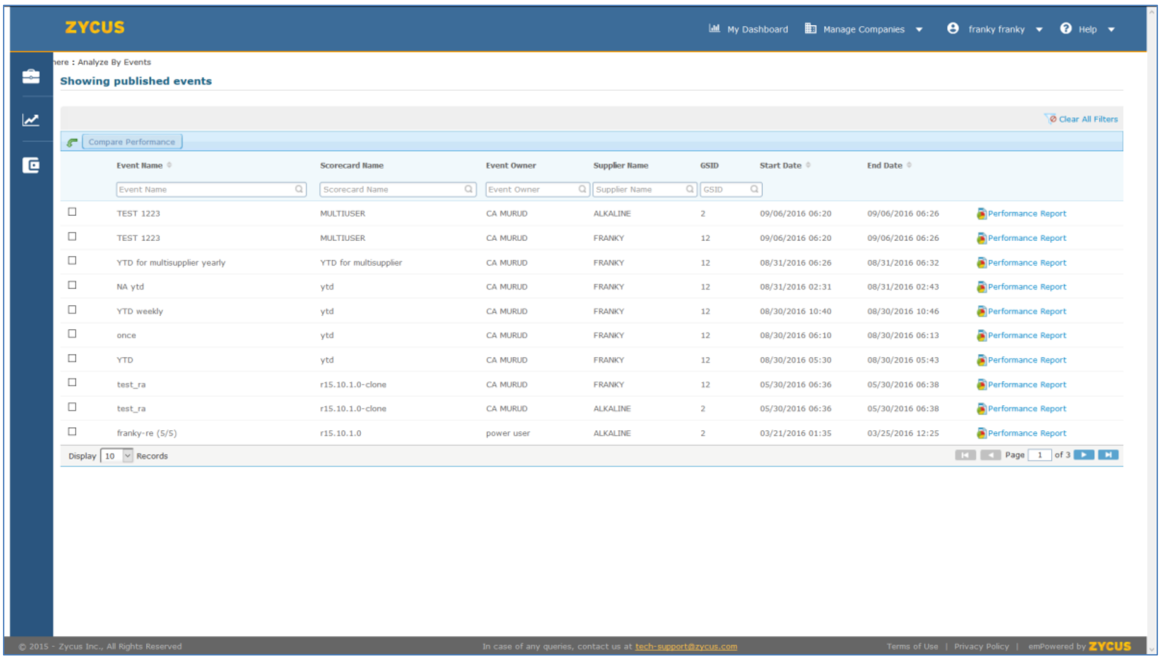
2. Enter the email address of the person you want to score this event on behalf of you.

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:

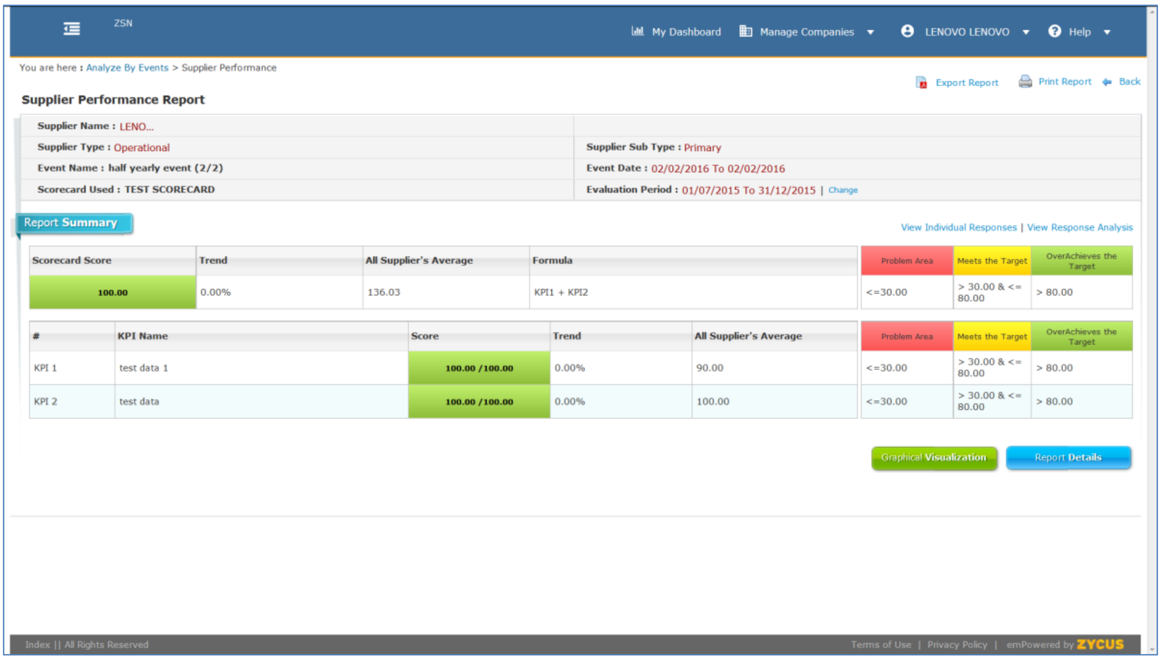



1. To compare performances for different events, select the events by checking the box against their name.
2. Once you complete selecting the events, click on **Compare Performance**.

***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.

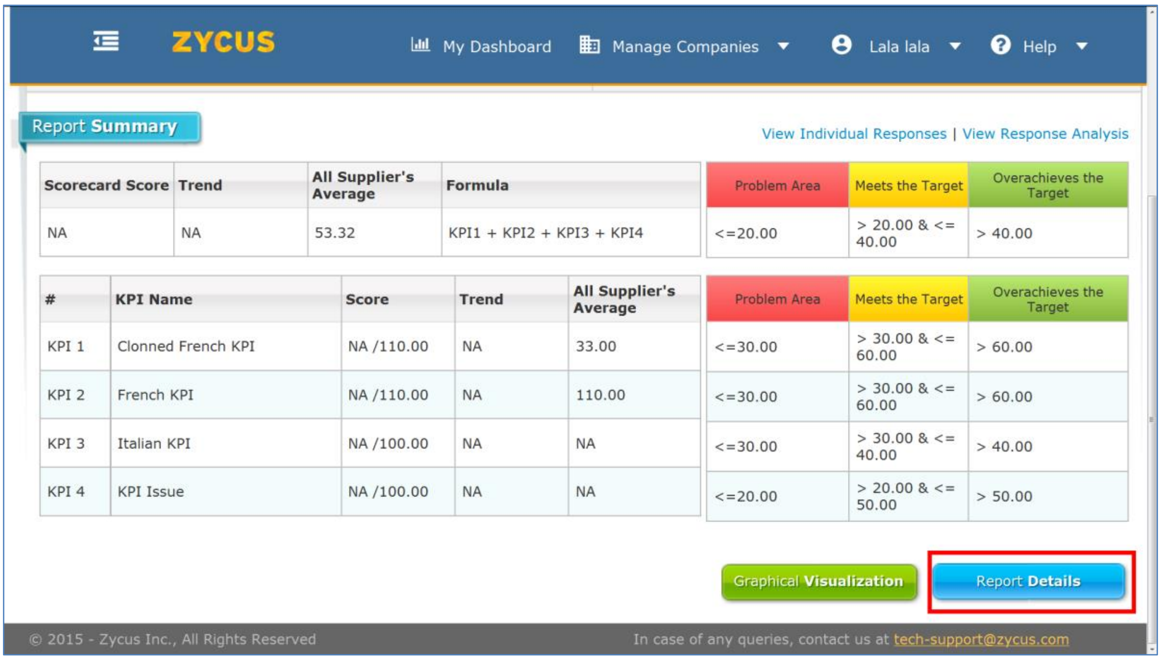



4. Click **Export Report** to export the performance report for an event. The performance report will be exported to PDF.

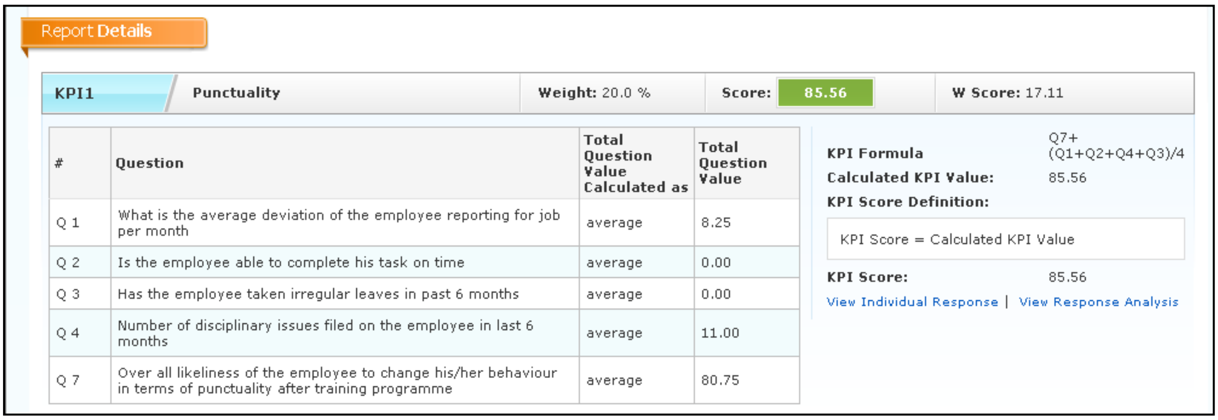
5. Click **Print Report** to print the performance report for a supplier or all suppliers in an event.

6. Click **Change** to change the Event or the performance evaluation period.

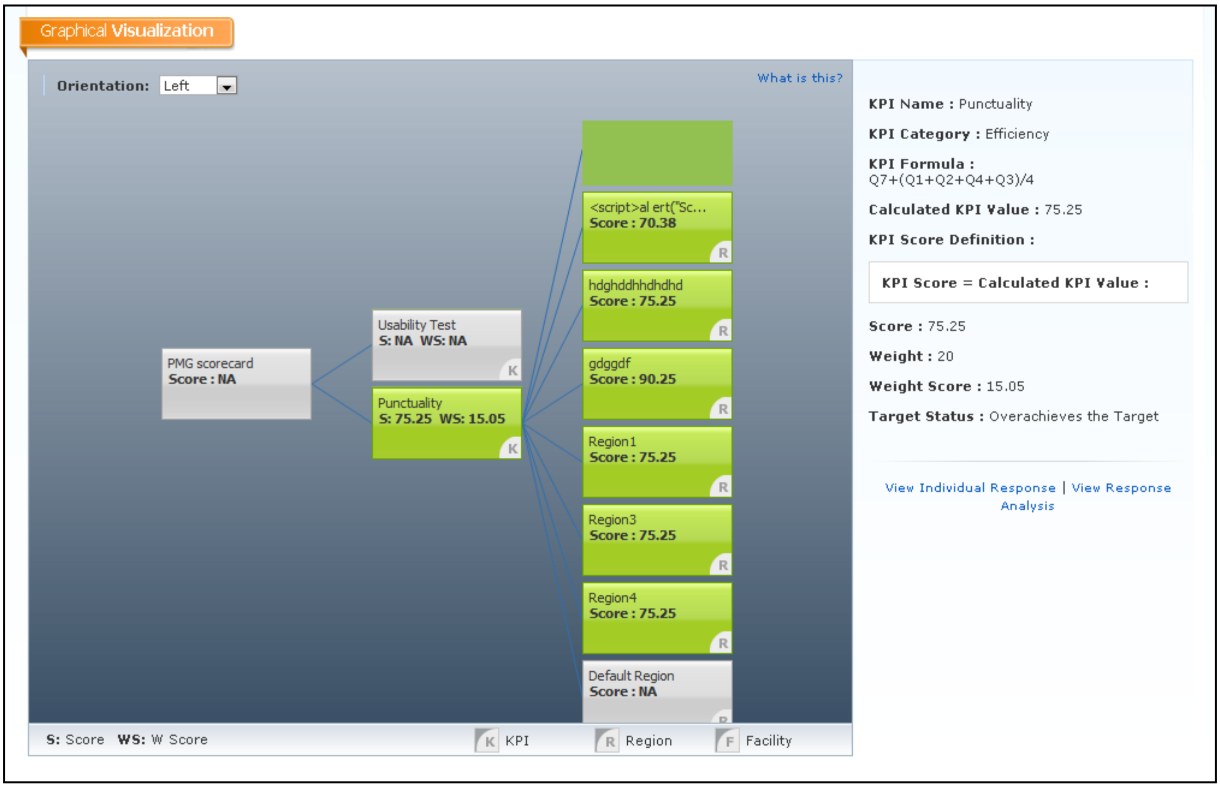

7. Click **Report Details** to view the score details of each KPI.




8. The report details page will open:

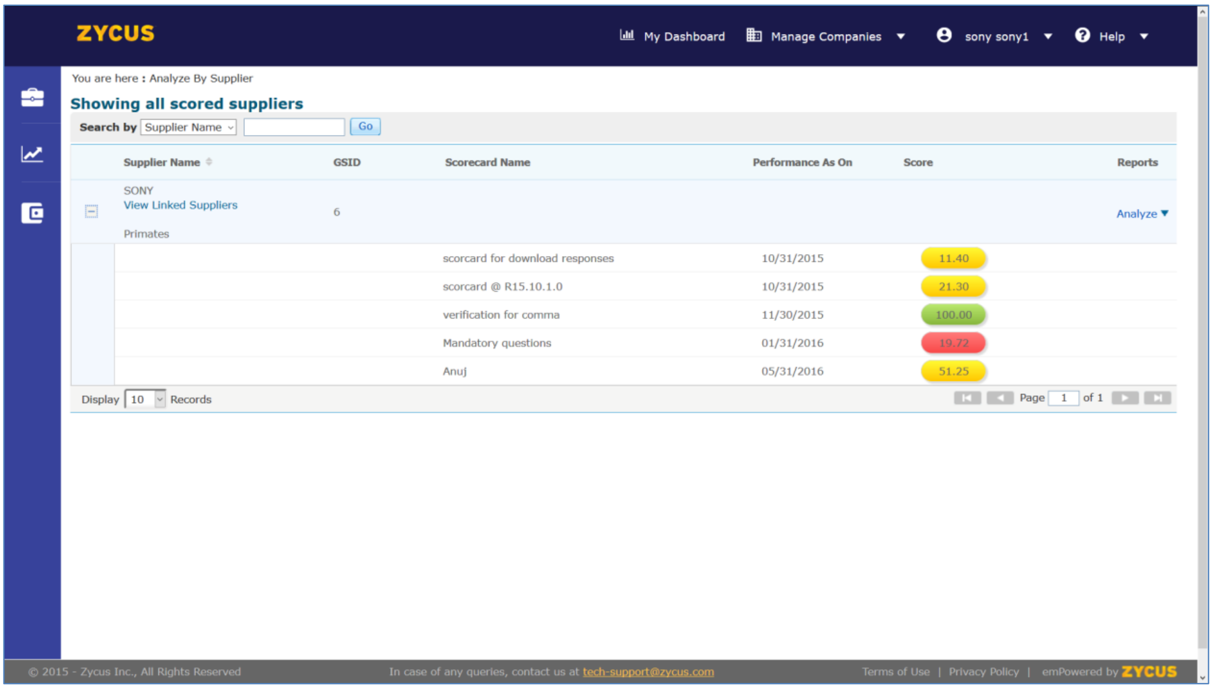



9. Click **Graphic Visualization** to view an interactive data visualization tool that allows you to view the three dimensions - KPI, Facility and Region in a pictorial form.



### 6.5.3 How to View 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:



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.

#### *6.5.3.1 Linked Suppliers*

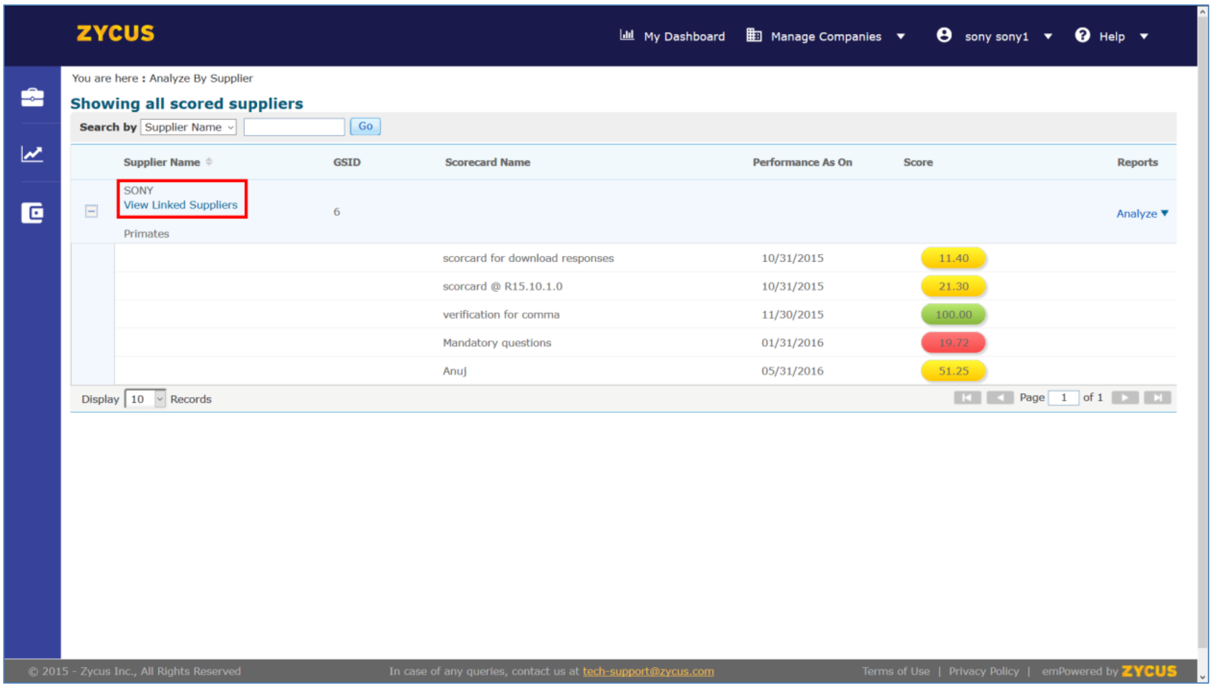
iPerform's provides you with the ability to view the event-specific KPI scores (Hierarchical Score) for a Parent and Child Supplier.

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

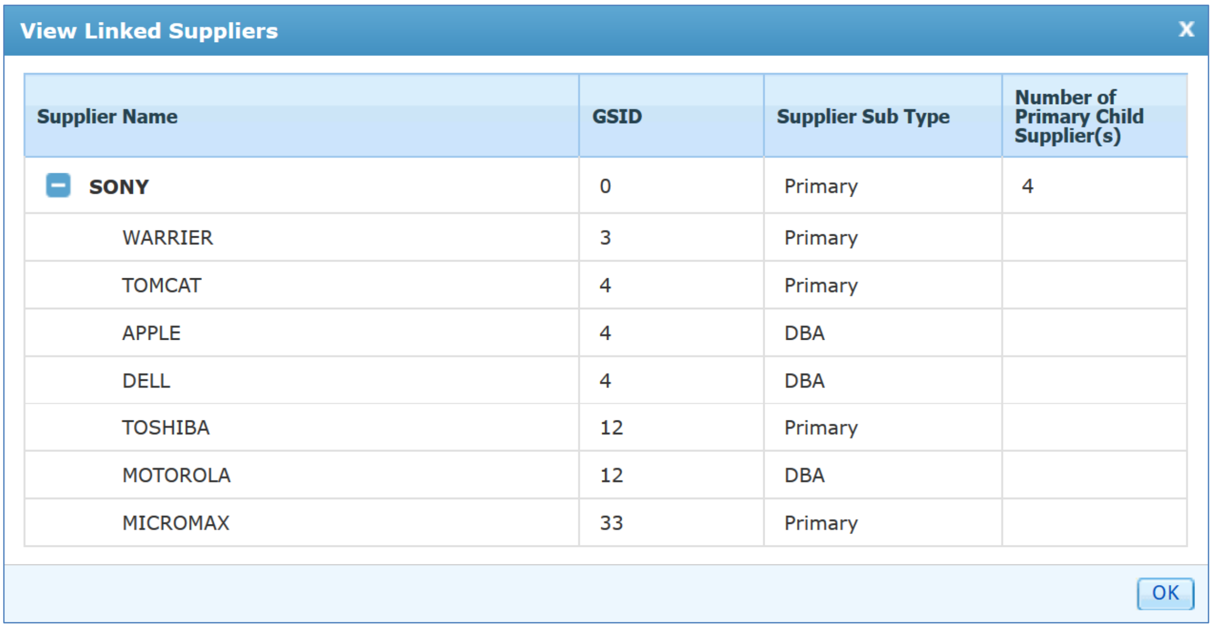
The parent-child relationship is referred from iSupplier. The definitions of a Parent Supplier and Child Supplier remain the same as defined in iSupplier.

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.



View Linked Suppliers

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

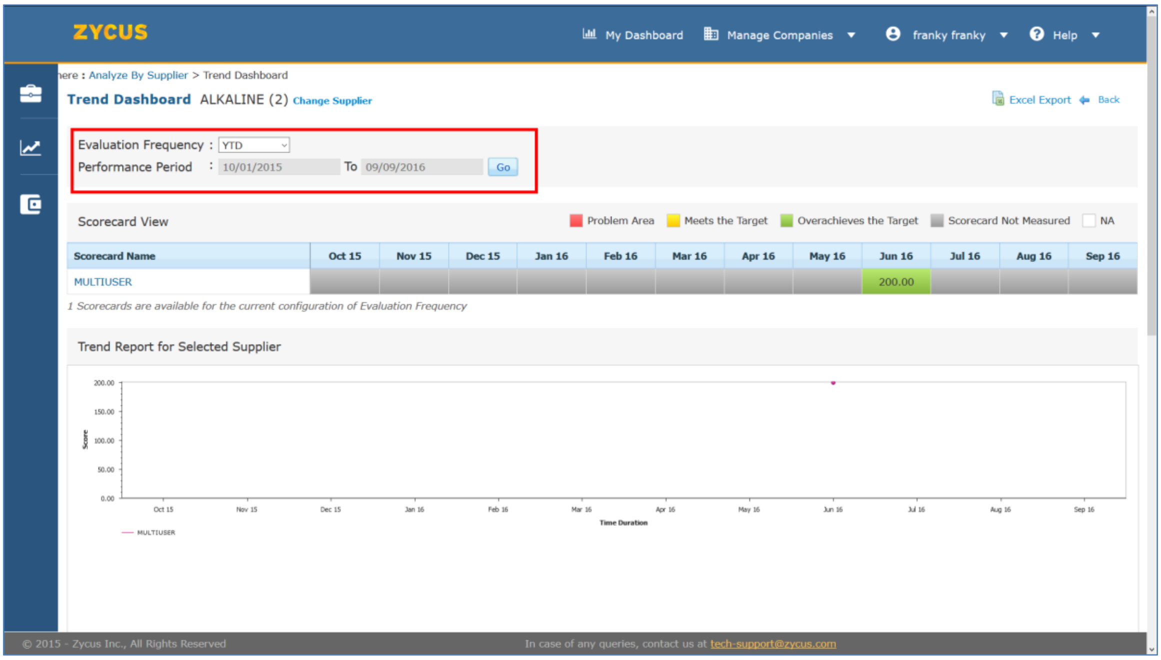
OK

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).

### *6.5.3.2 Trend Dashboard*

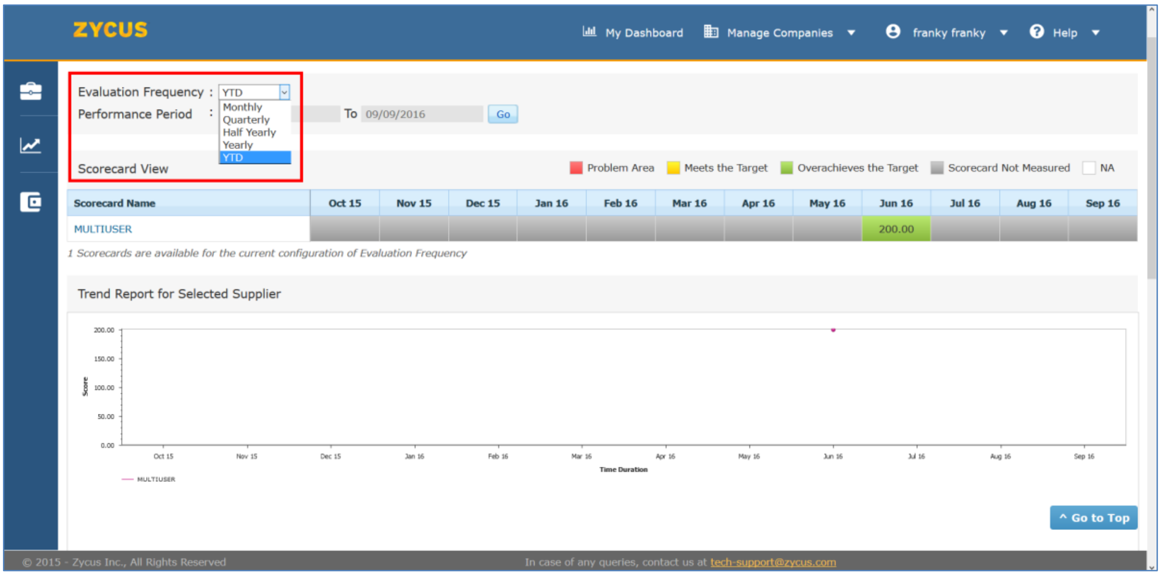
## Year to Date (YTD)

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.

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




***<u>NOTE:</u>*** 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.

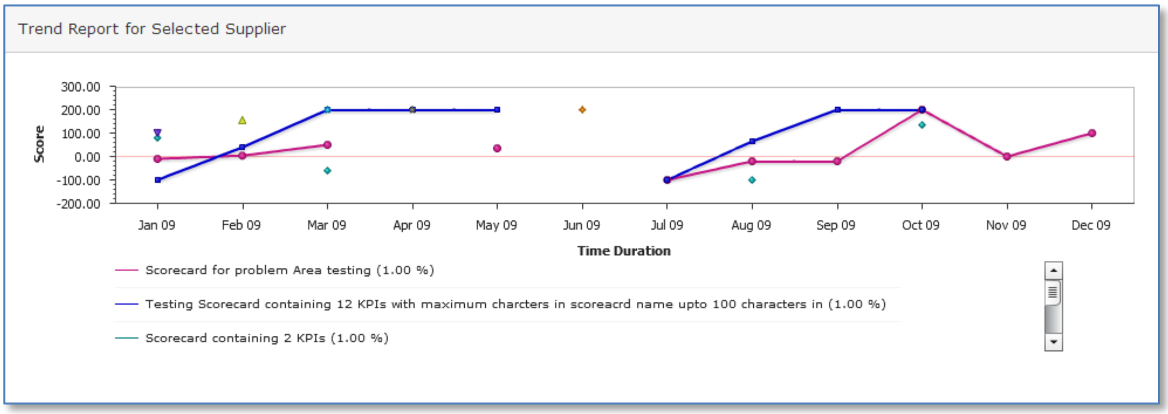
Scorecard View — Problem Area | Meets the Target | Overachieves the Target | Scorecard Not Measured | NA

| 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 | |
| "S!p@e#c$ia%l^ ~c*h(a)... | 0.00 | | | | | | 200.00 | | | | | |
| Scorecrad containing 4 kpis | 1.00 | | | | 200.00 | | | | | | | |
| Scorecrad with 3 KPIs | 1.00 | | | 200.00 | | | | | | | | |
| Scorecrad for 2 kpis | 1.00 | | 156.00 | | | | | | | | | |
| -`~!<>/@#$%^&*()_+-... | 0.00 | 100.00 | | | | | | | | | | |

*8 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.

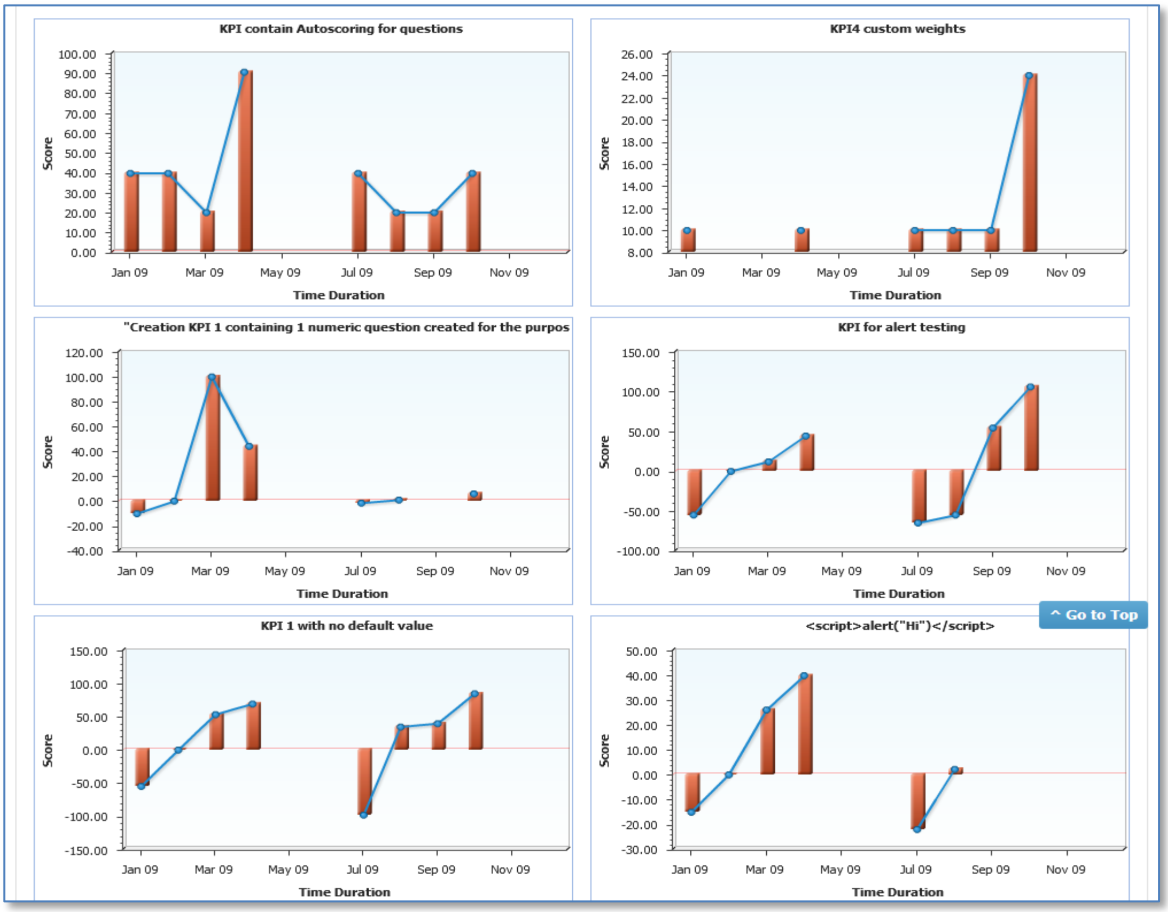
KPI View

**Testing Scorecard containing 12 KPIs with maximum charcters in scoreacrd 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 | |
| "S!p@e#c$ia%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 | 6.00 | |
| KPI2 sum | -44.00 | 0.00 | 60.00 | 27.00 | NA | NA | -19.00 | 8.00 | 18.00 | 11.00 | |

^ Go to Top

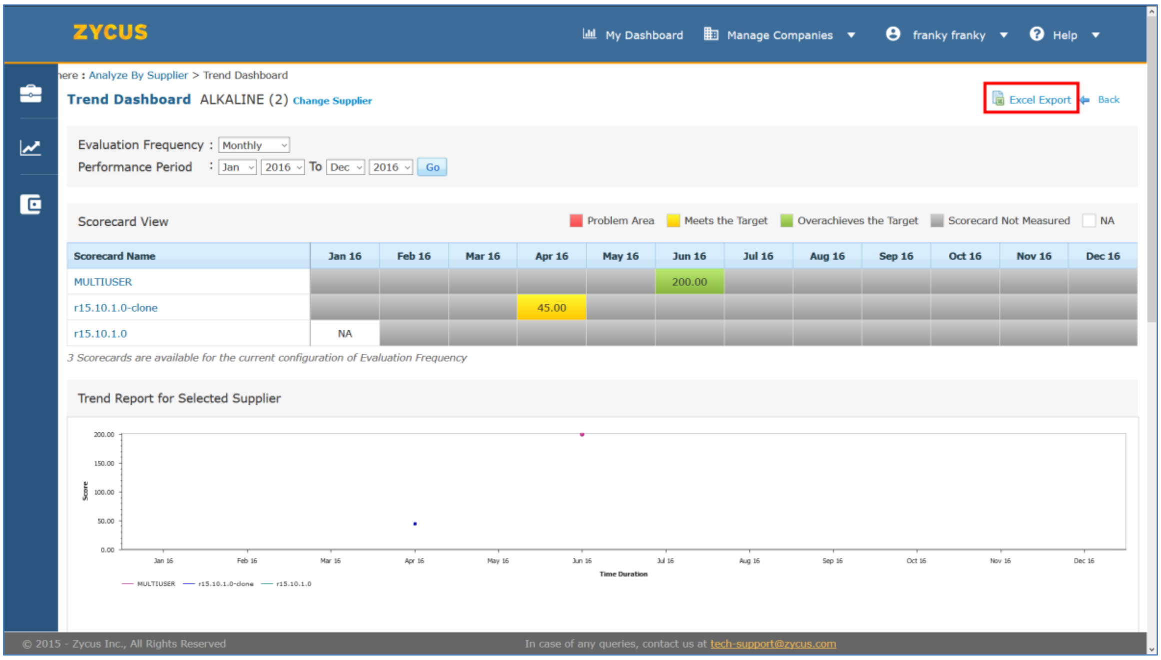
Below the "KPI View" section, you will get the graphs which represent the data mentioned in the KPI view section. The graphs in this section are generated based on the data present in "KPI View" section.



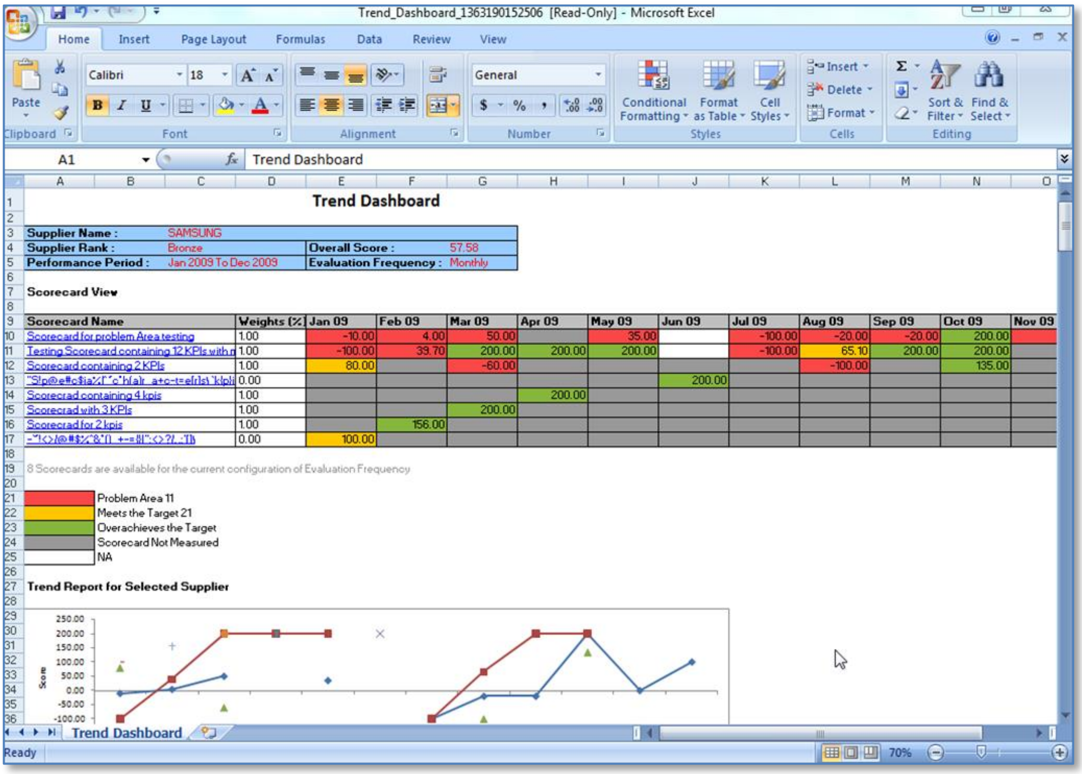

If page contains more than 12 scorecards and KPI's more than a limit, they will be loaded on demand/scroll.

## 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.



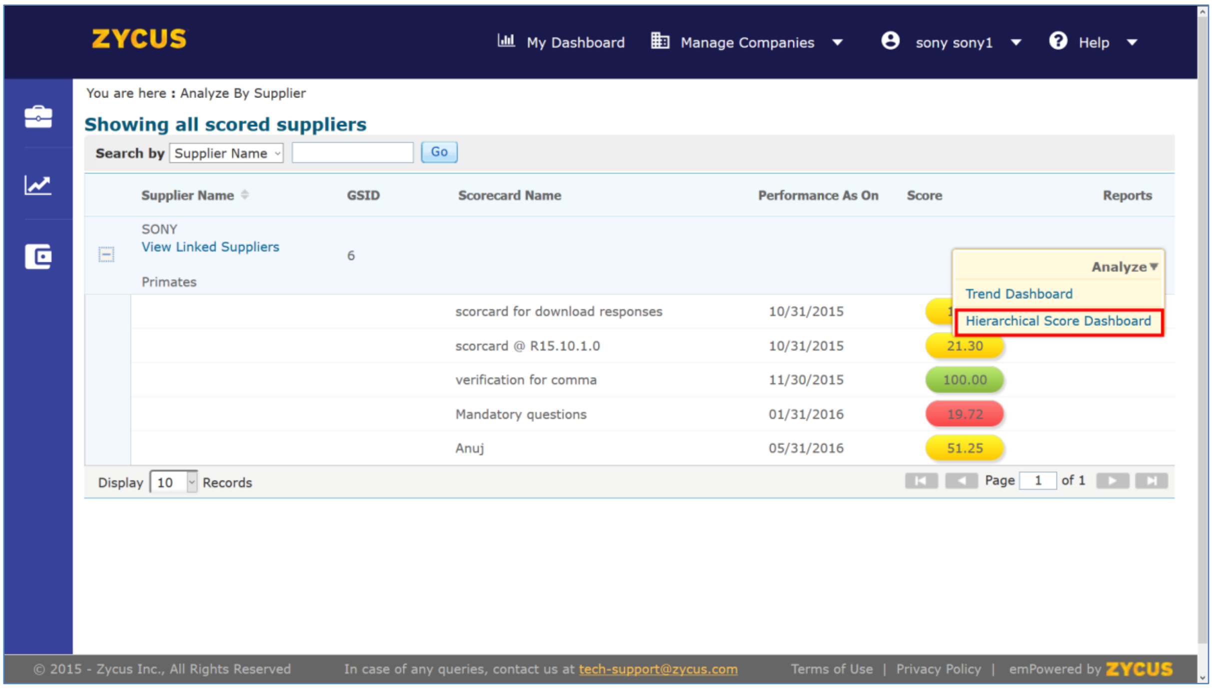

With the help of this feature, users can perform their own arithmetic calculations on the exported data. Just as you start making changes to the exported data, the graphs will also get changed accordingly.

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.

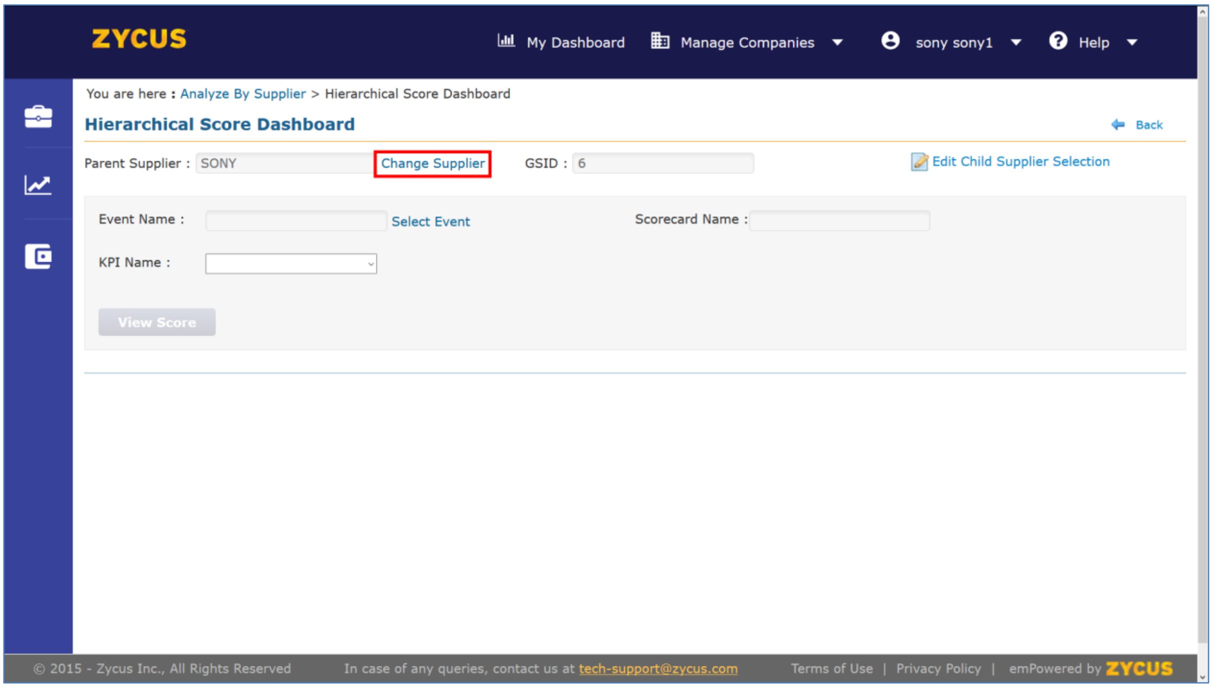
#### 6.5.3.3 *Hierarchical Score Dashboard*

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:



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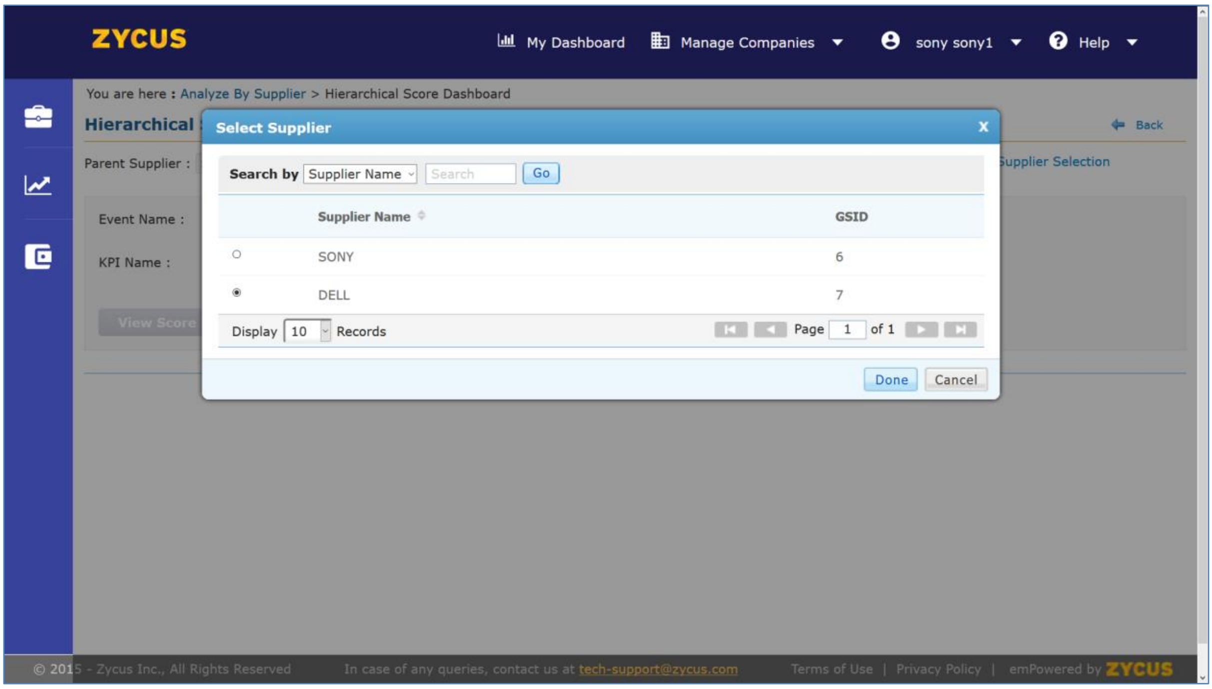
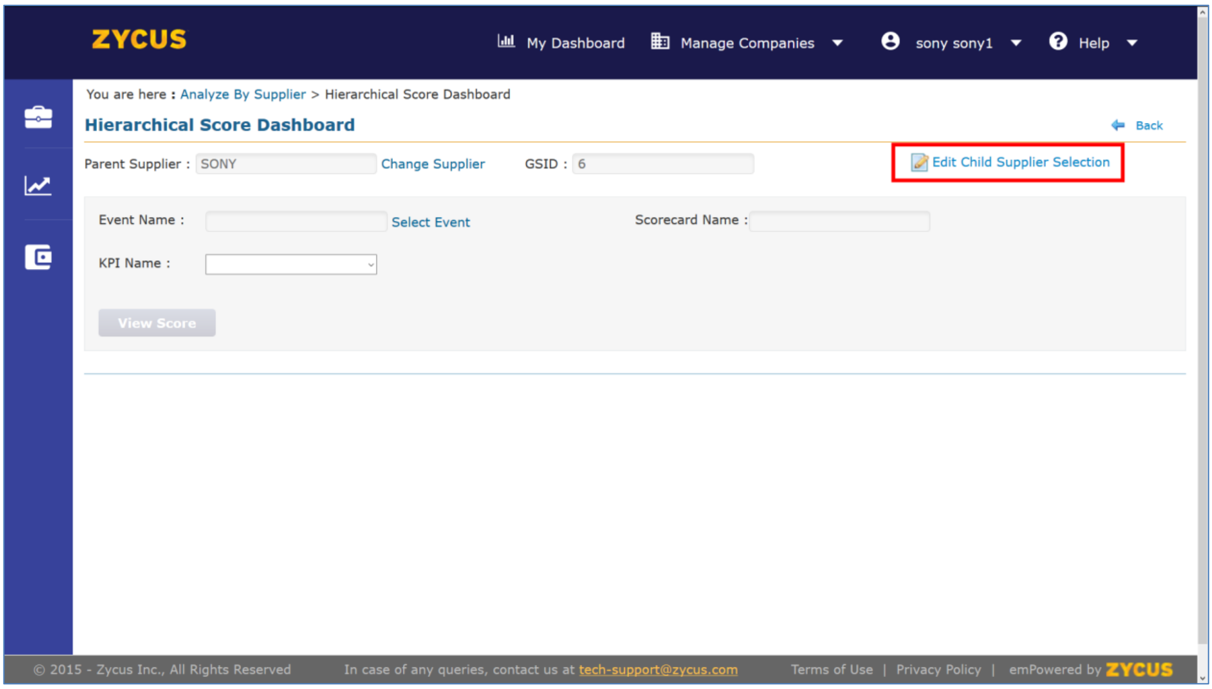
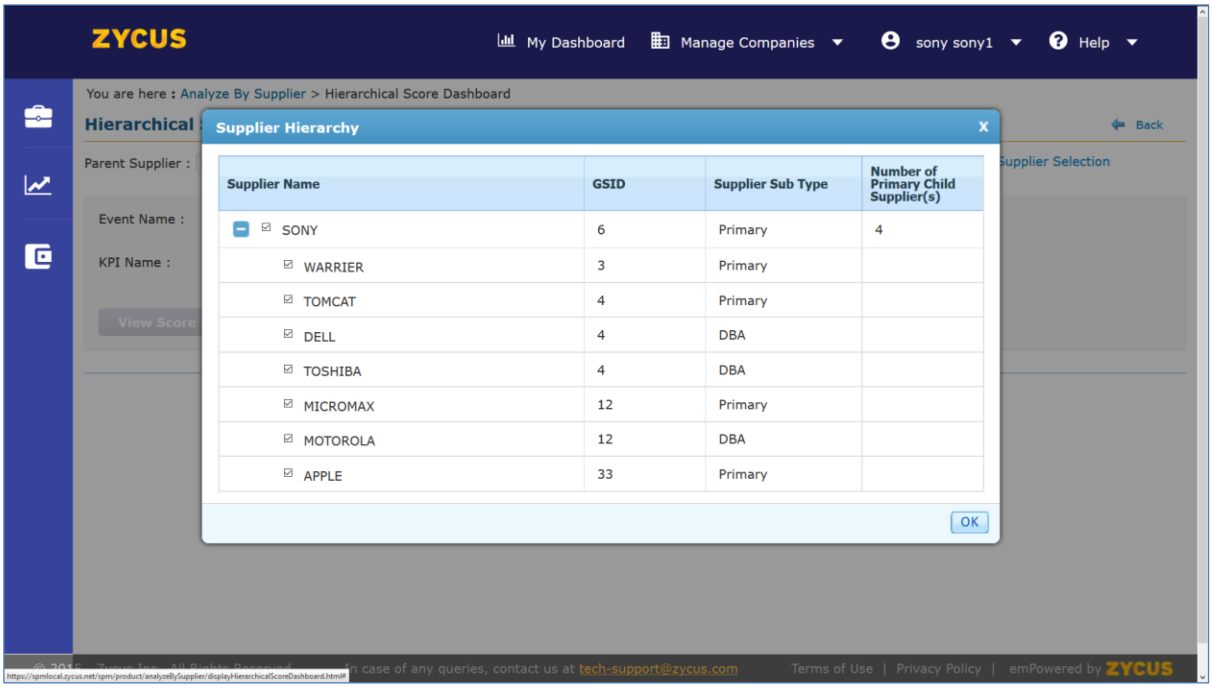
3. The selected supplier's name will appear by default in the **Parent Supplier** field. You can change the supplier on this page by using the **Change Supplier** link *(highlighted in the image above)*.
4. On clicking **Change Supplier**, following popup will appear:



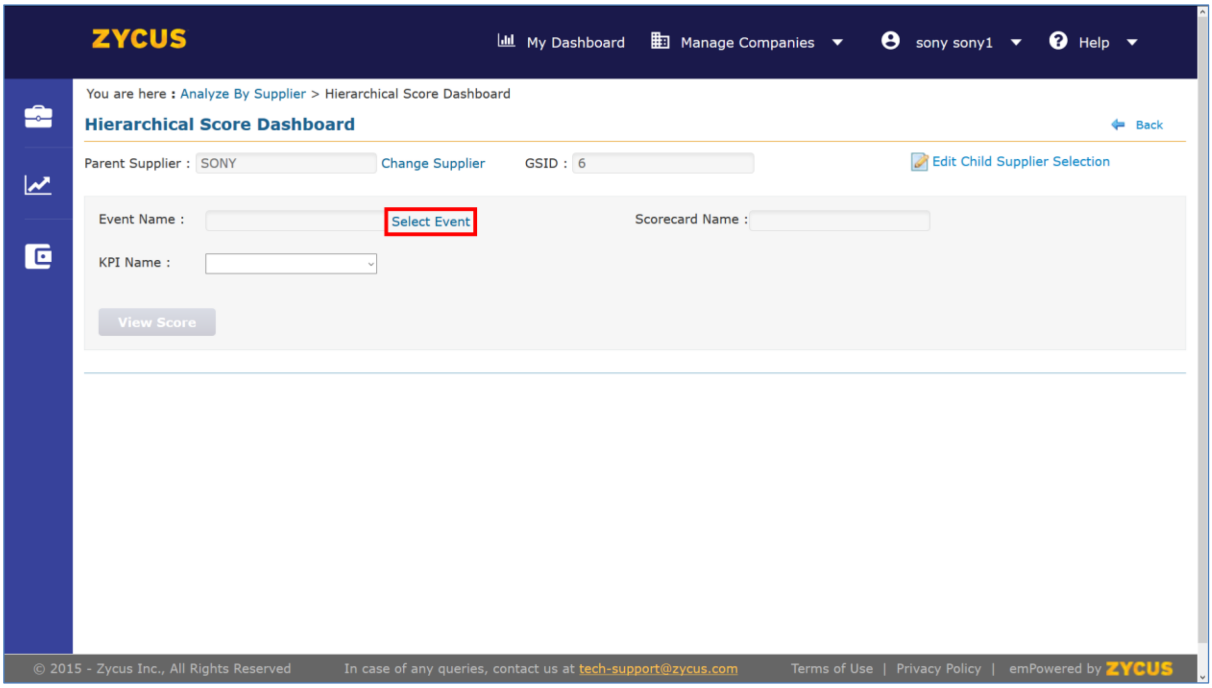
5. Select a supplier and click **Done**. The supplier will change.
6. The selected supplier might have multiple child suppliers and their children. You can decide whose hierarchical score you want to view. To change the selection of child suppliers, click **Edit Child Supplier Selection**.



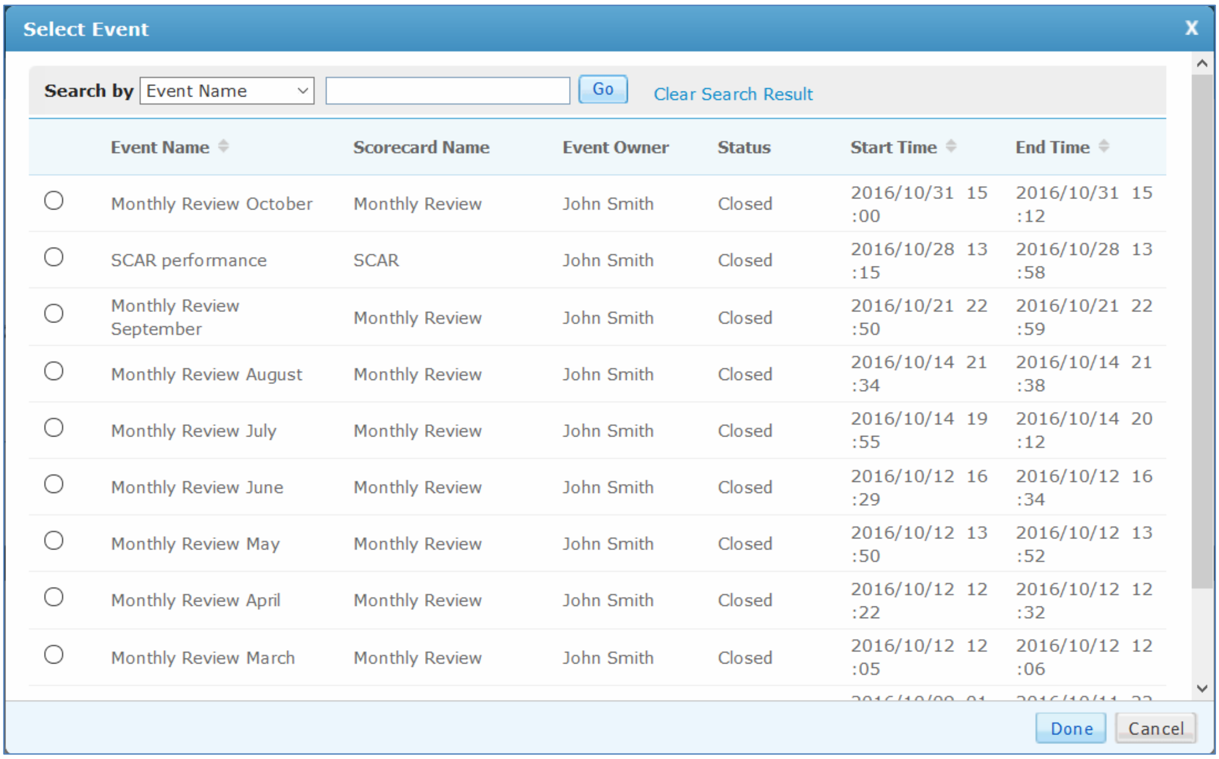
7. It will display the complete hierarchy of the selected supplier and its children and their children (if any) as shown below:



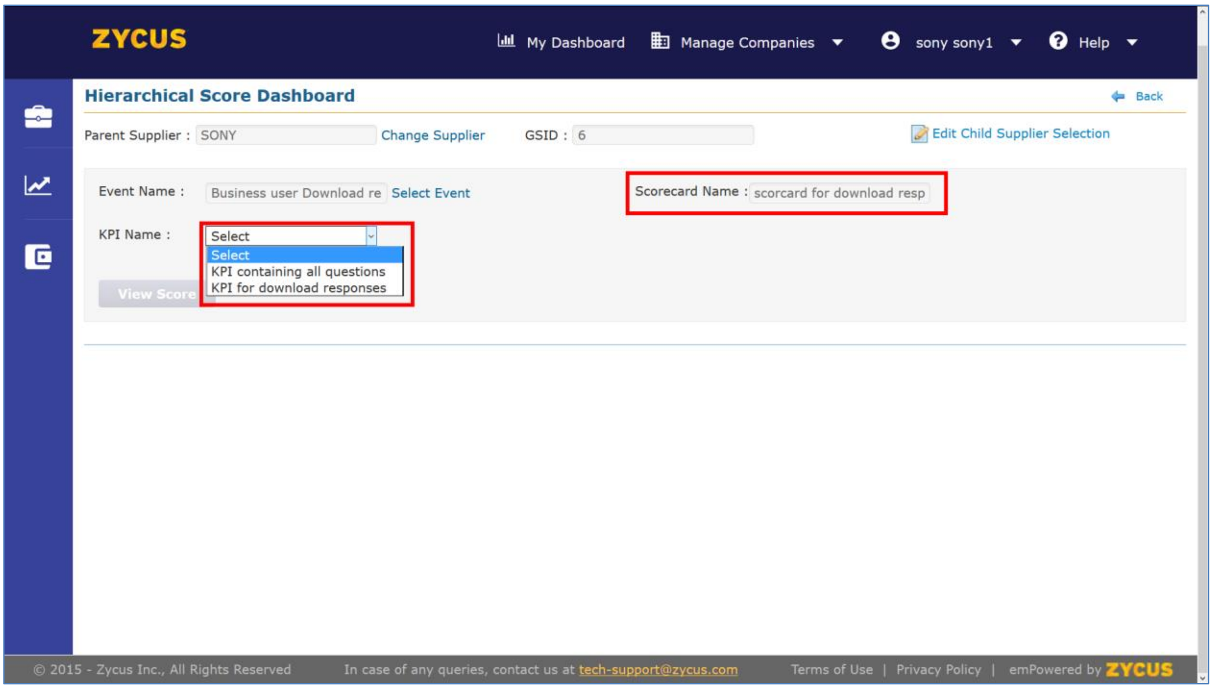

8. Deselect a supplier if that supplier is not to be included in the **Hierarchical Score** calculation and click **OK**.
9. Now click **Select Event** for which you want to calculate the **Hierarchical Score.**



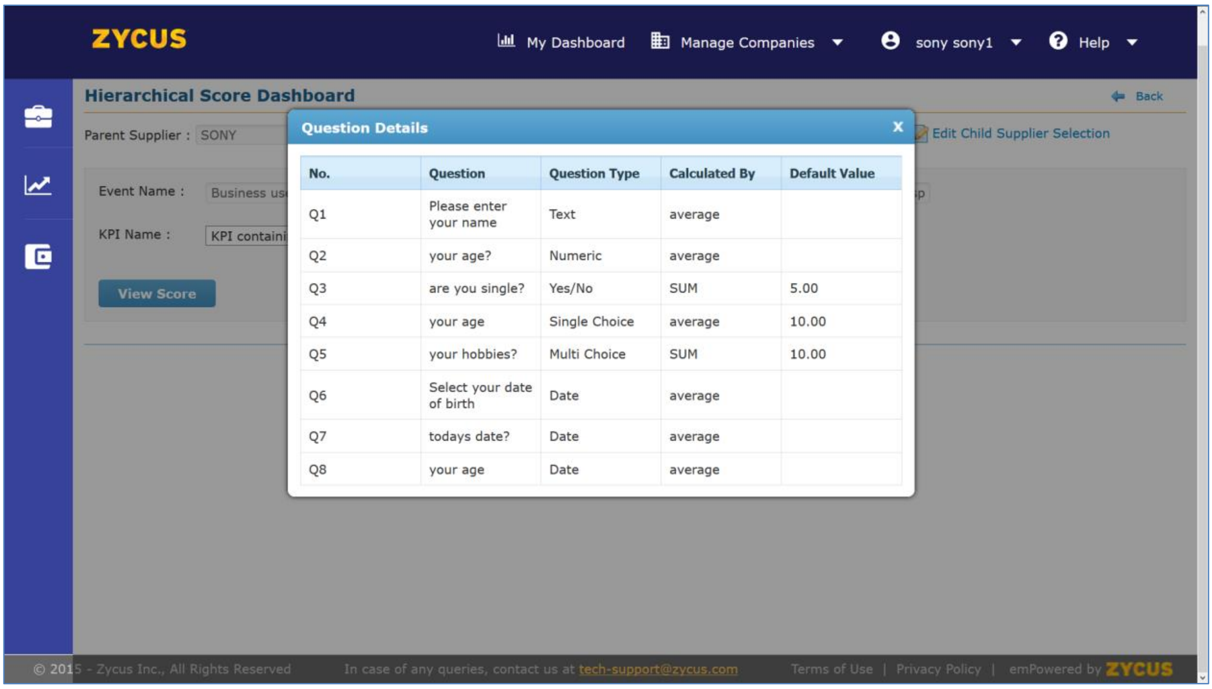

10. Event popup will appear.




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.



13. 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.




14. 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.

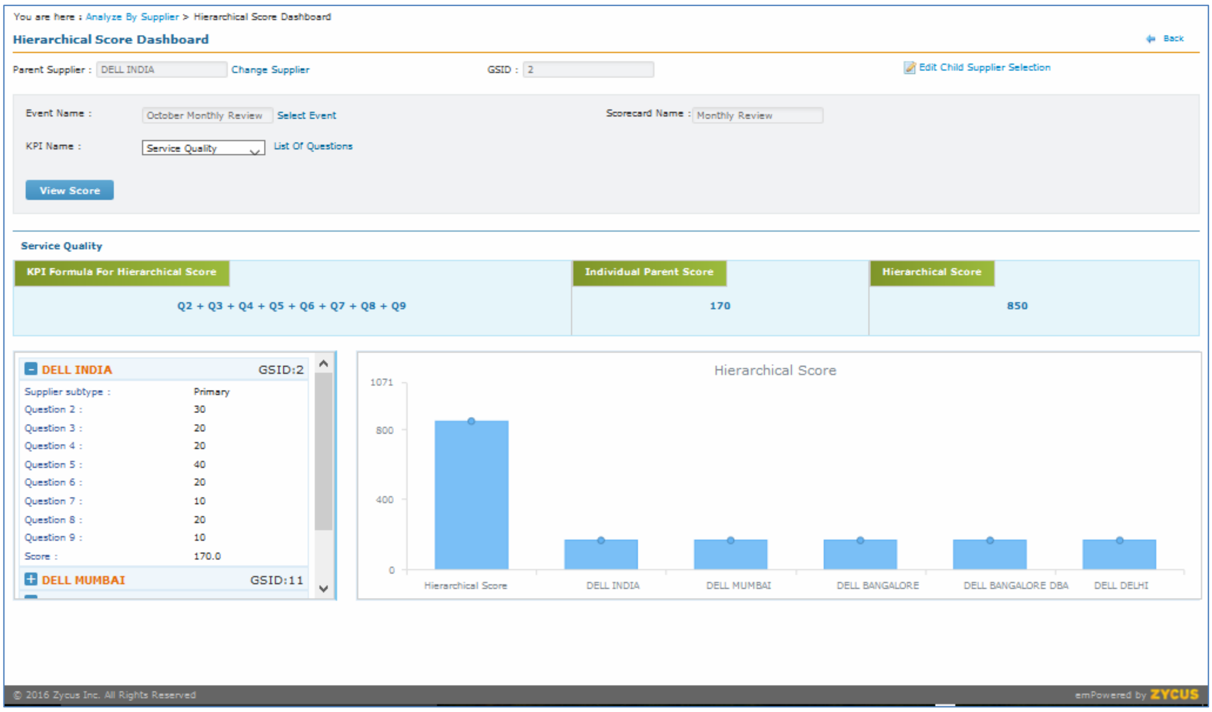
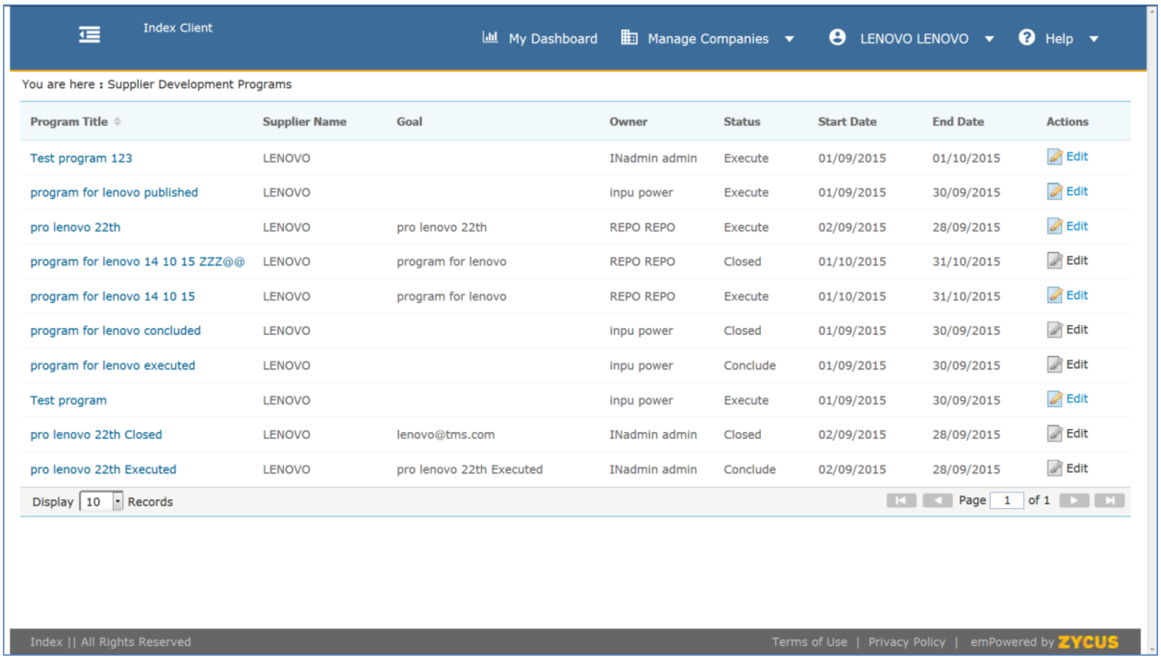



**Figure 1: Hierarchical Score Dashboard**

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**.

### 6.5.4 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.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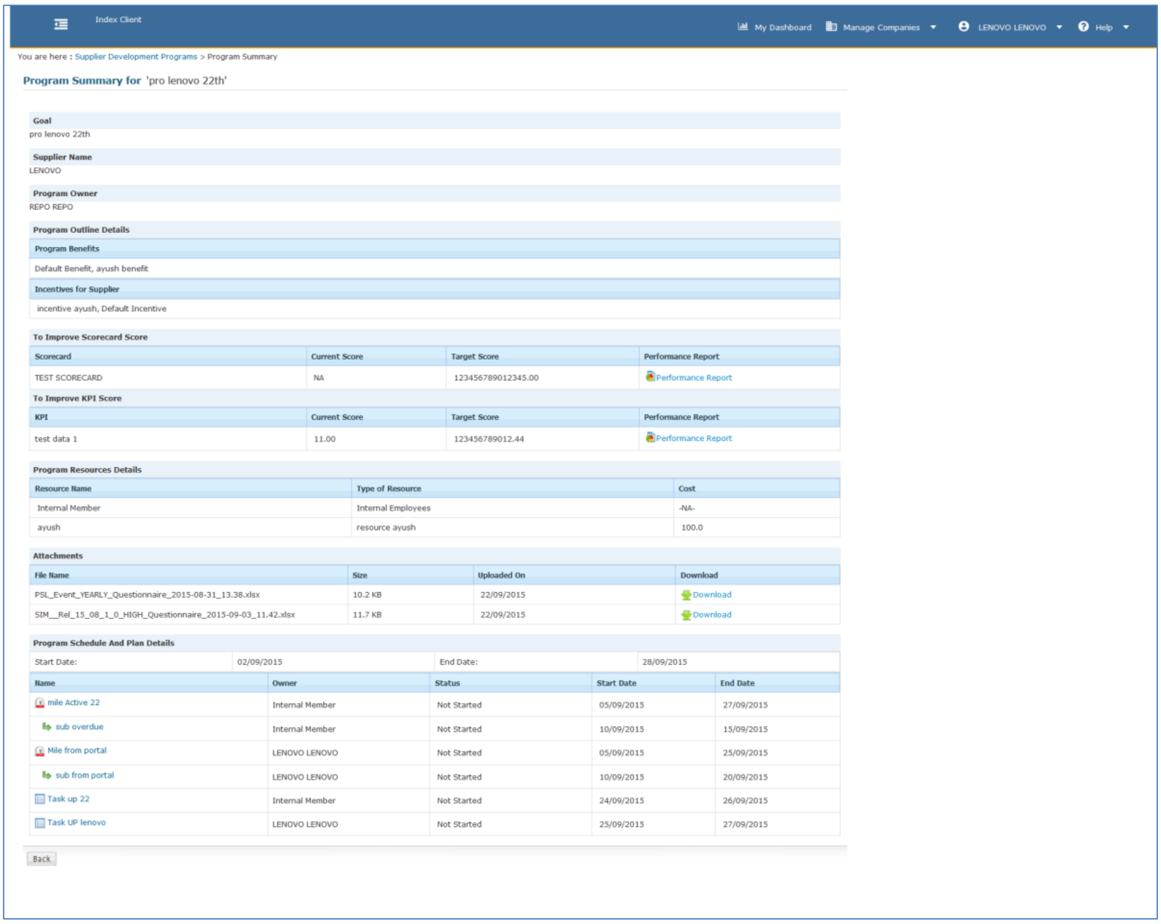
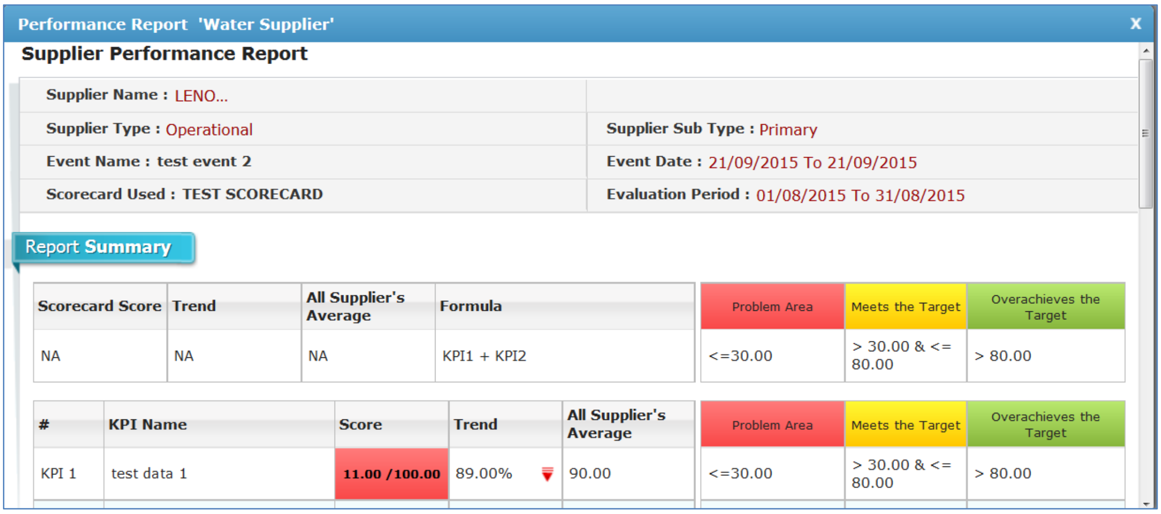
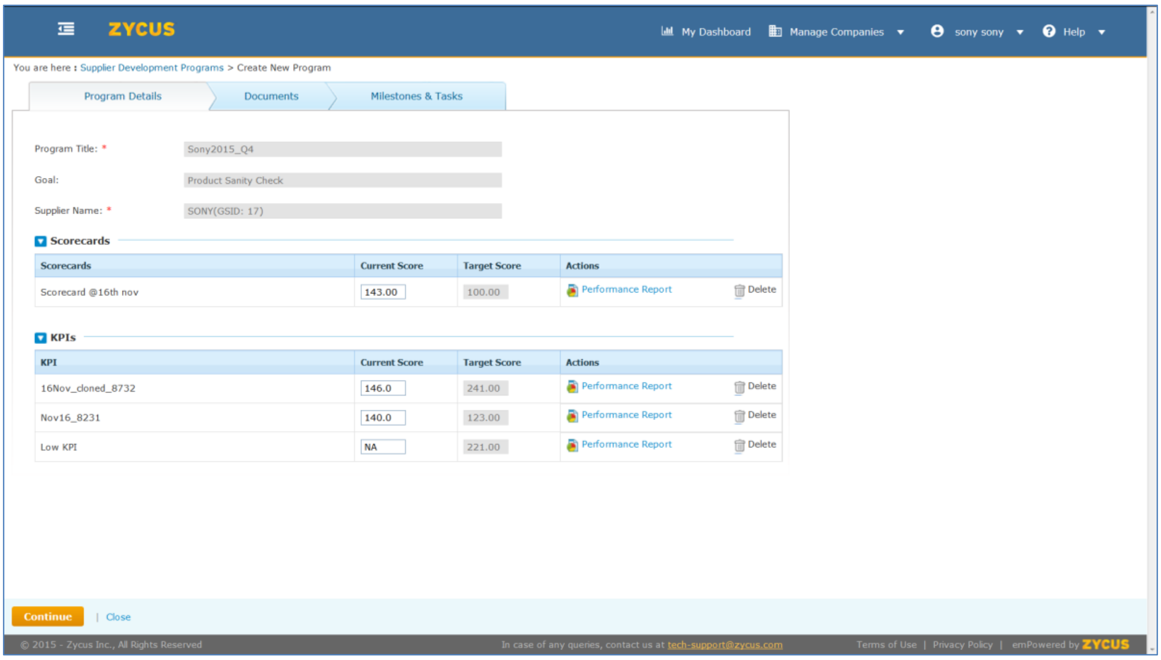



3. Click Performance Report , to view the performance report details. You will get following popup:

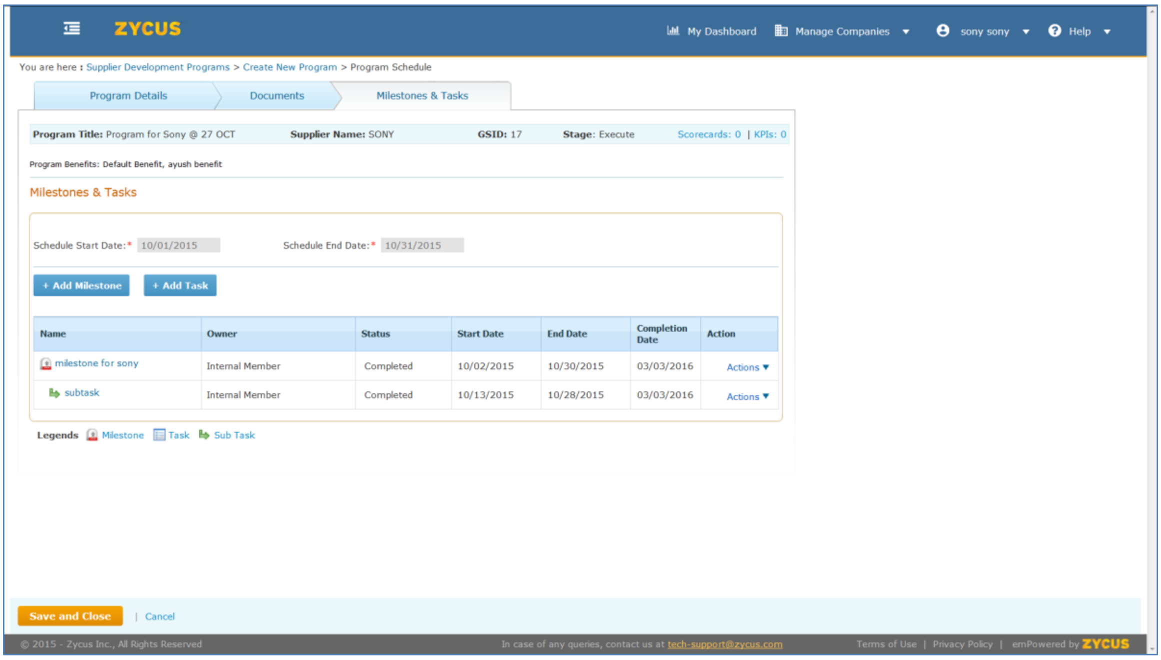



4. Click **Edit** against the program title of which you are an owner. You will see following page:




***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.

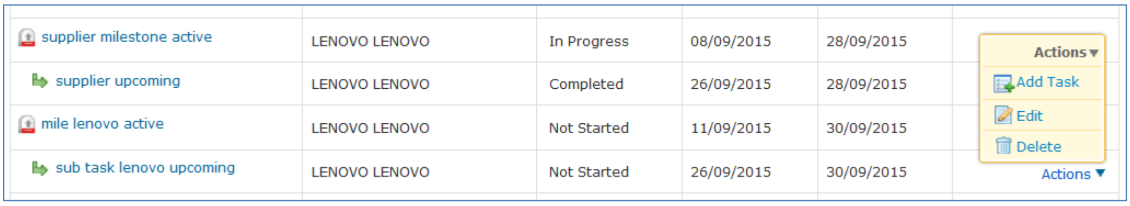



7. You will be able to see your milestones and tasks along with the internal user's milestones and task.

***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.

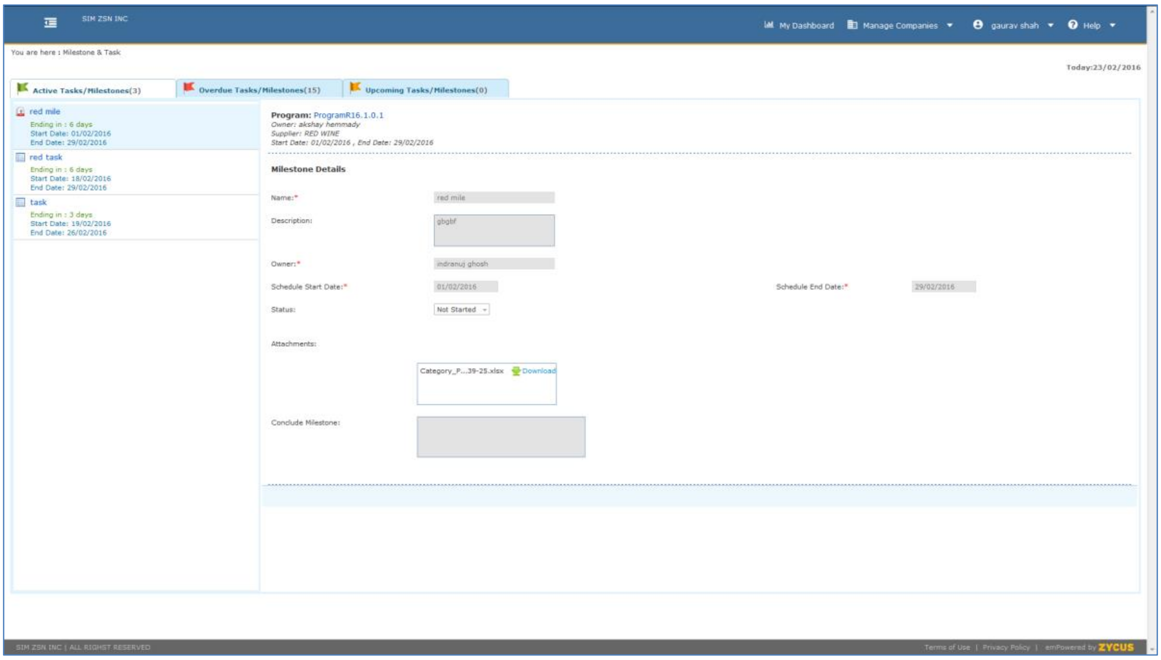
8. Identify a milestone or task of which you are an owner and click on **Actions** drop-down.




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

### 6.5.5 How to View Tasks and Milestones?

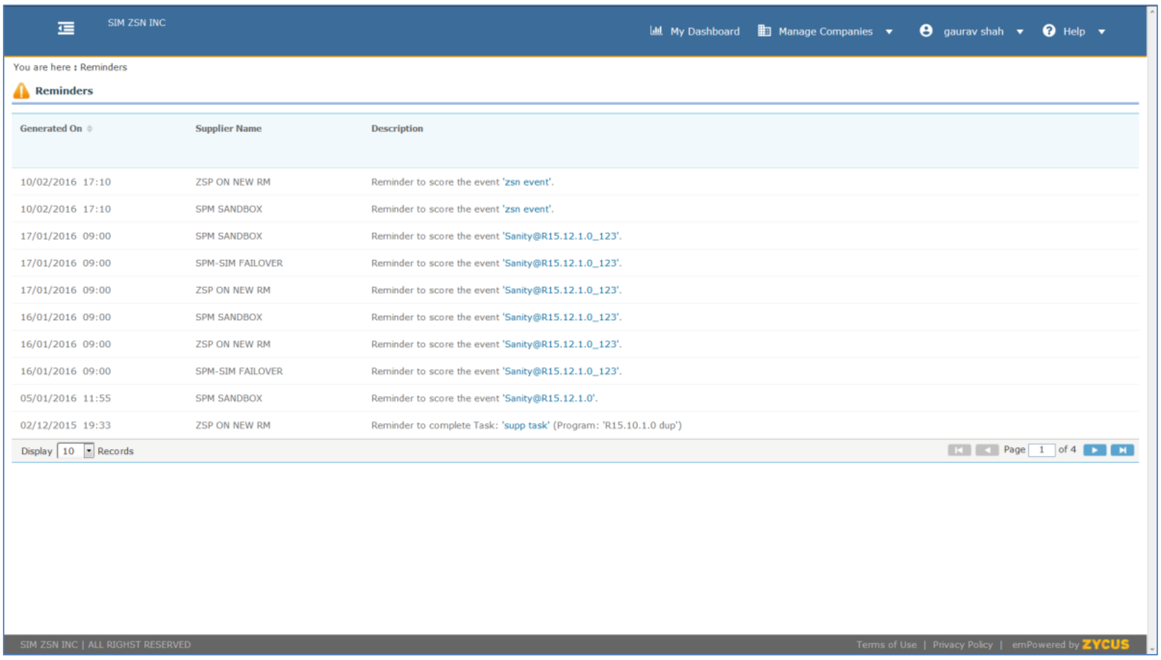
From the side panel, under **My Performance**, hover over **View Tasks and Milestones**. You will see a list of customer company whose tasks and milestones you can view. Select a customer company of your choice. You will be navigated to following page:




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

### 6.5.6 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:

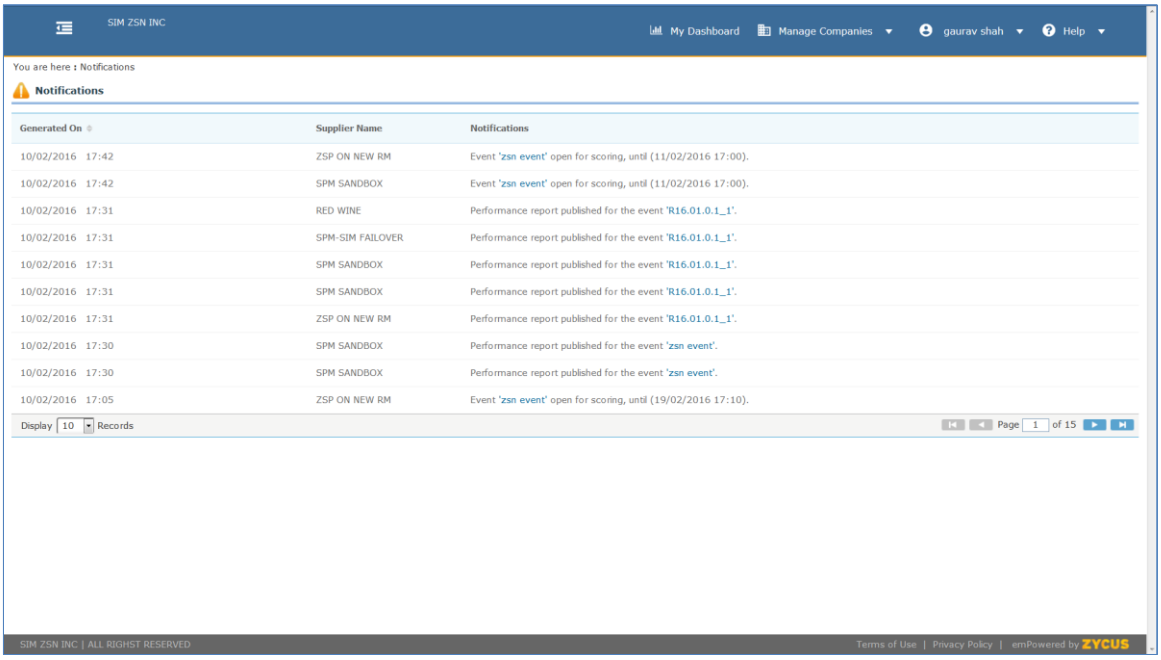



| Generated On | Supplier Name | Description |
|---|---|---|
| 10/02/2016 17:10 | ZSP ON NEW RM | Reminder to score the event 'zsn event'. |
| 10/02/2016 17:10 | SPM SANDBOX | Reminder to score the event 'zsn event'. |
| 17/01/2016 09:00 | SPM SANDBOX | Reminder to score the event 'Sanity@R15.12.1.0_123'.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

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.

### 6.5.7 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:




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.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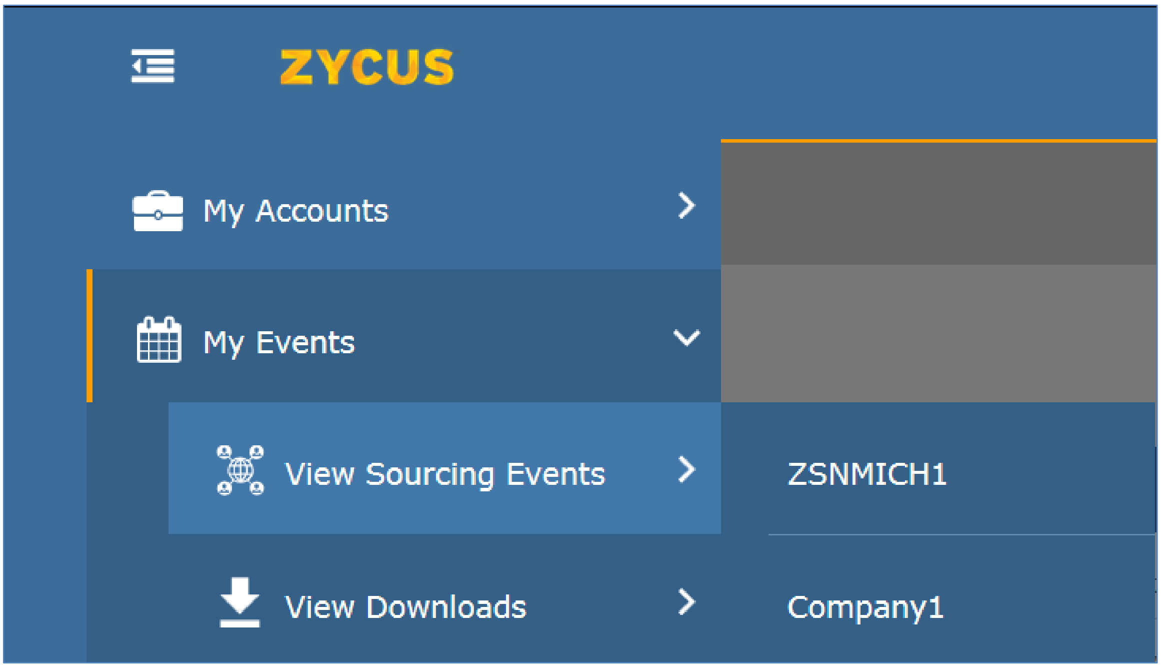
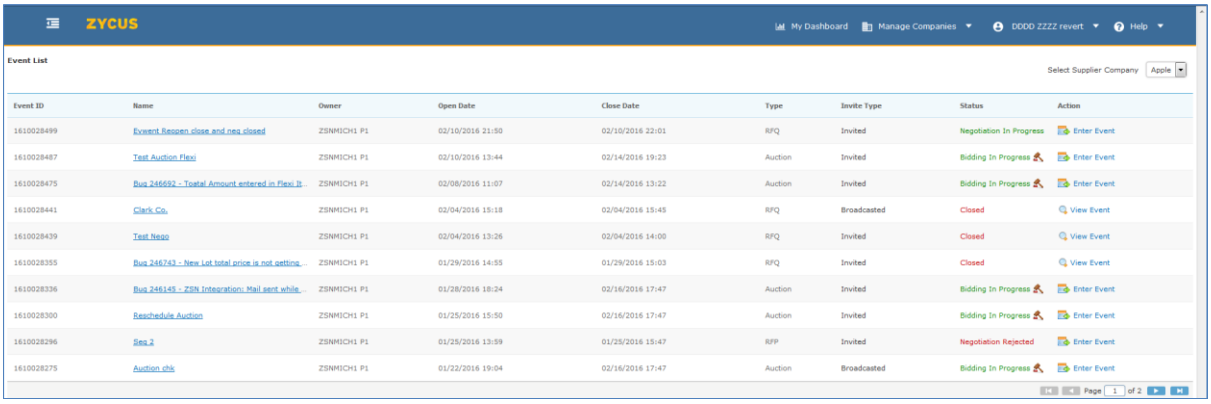
## 6.6 My Events

***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:

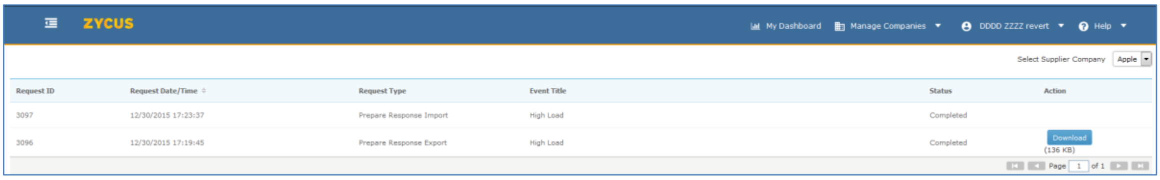



| Event ID | Name | Owner | Open Date | Close Date | Type | Invite Type | Status | Action |
|---|---|---|---|---|---|---|---|---|
| 1610028499 | Evwent Reopen close and neg closed | ZSNMICH1 P1 | 02/10/2016 21:50 | 02/10/2016 22:01 | RFQ | Invited | Negotiation In Progress | Enter Event |
| 1610028487 | Test Auction Flexi | ZSNMICH1 P1 | 02/10/2016 13:44 | 02/14/2016 19:23 | Auction | Invited | Bidding In Progress | Enter Event |
| 1610028475 | Bug 246692 - Toatal Amount entered in Flexi It... | ZSNMICH1 P1 | 02/08/2016 11:07 | 02/14/2016 13:22 | Auction | Invited | Bidding In Progress | Enter Event |
| 1610028441 | Clark Co. | ZSNMICH1 P1 | 02/04/2016 15:18 | 02/04/2016 15:45 | RFQ | Broadcasted | Closed | View Event |
| 1610028439 | Test Nego | ZSNMICH1 P1 | 02/04/2016 13:26 | 02/04/2016 14:00 | RFQ | Invited | Closed | View Event |
| 1610028355 | Bug 246743 - New Lot total price is not getting ... | ZSNMICH1 P1 | 01/29/2016 14:55 | 01/29/2016 15:03 | RFQ | Invited | Closed | View Event |
| 1610028336 | Bug 246145 - ZSN Integration: Mail sent while ... | ZSNMICH1 P1 | 01/28/2016 18:24 | 02/16/2016 17:47 | Auction | Invited | Bidding In Progress | Enter Event |
| 1610028300 | Reschedule Auction | ZSNMICH1 P1 | 01/25/2016 15:50 | 02/16/2016 17:47 | Auction | Invited | Bidding In Progress | Enter Event |
| 1610028296 | Seq 2 | ZSNMICH1 P1 | 01/25/2016 13:59 | 01/25/2016 15:47 | RFP | Invited | Negotiation Rejected | Enter Event |
| 1610028275 | Auction chk | ZSNMICH1 P1 | 01/22/2016 19:04 | 02/16/2016 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

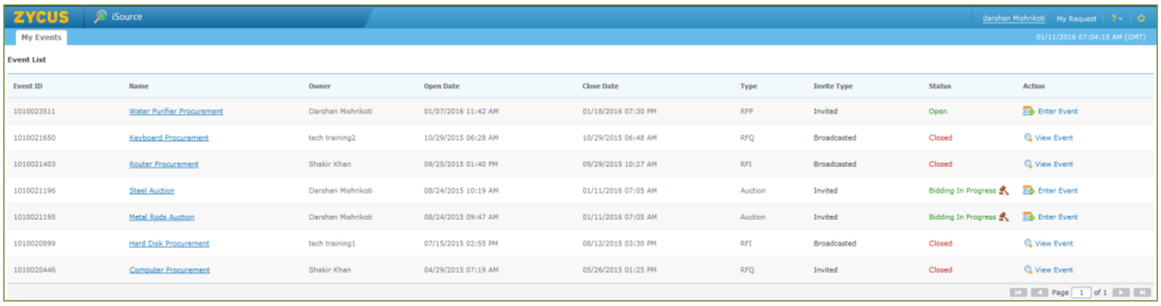
customer of your choice. Following page will be displayed:



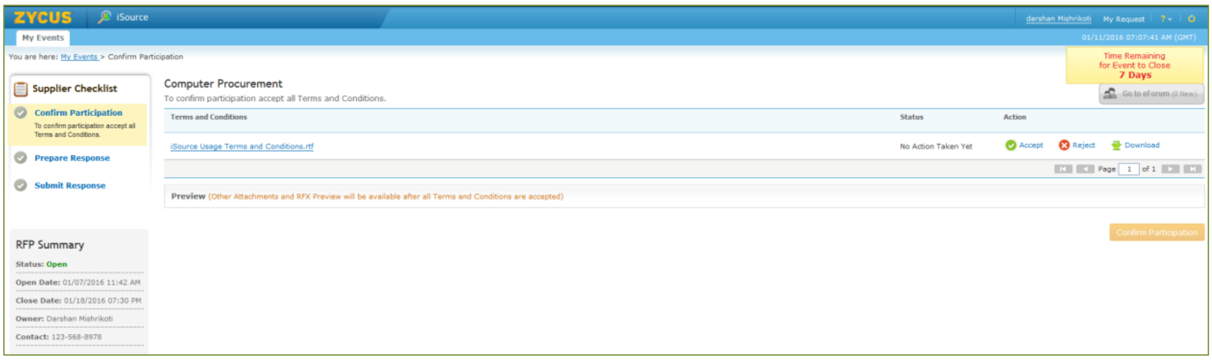

6. You will be able to download your response for a particular event.
7. Under the **Actions** tab, you will have option to download your responses for particular event.

## 6.6.1 <u>How to Enter an Event?</u>

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:





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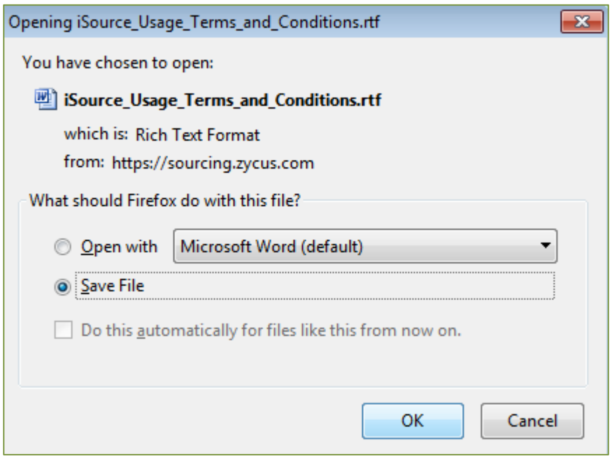
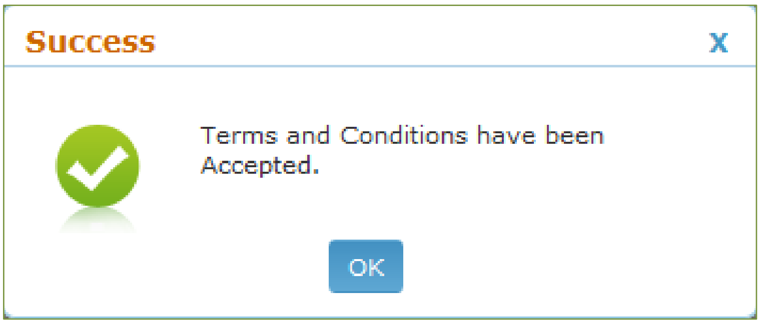
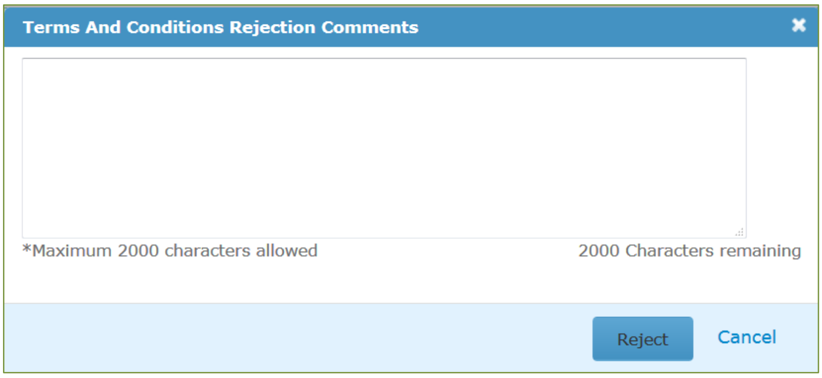
3. You can read or download the **Terms and Conditions**, by clicking the **Download** button.



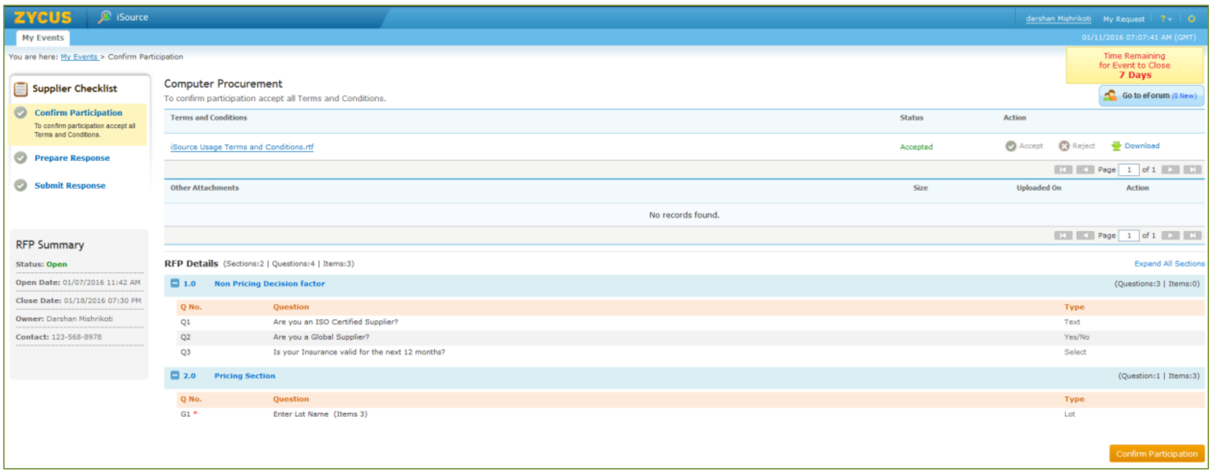

4. Click on **Accept** to accept the terms and conditions. The following popup will be displayed:



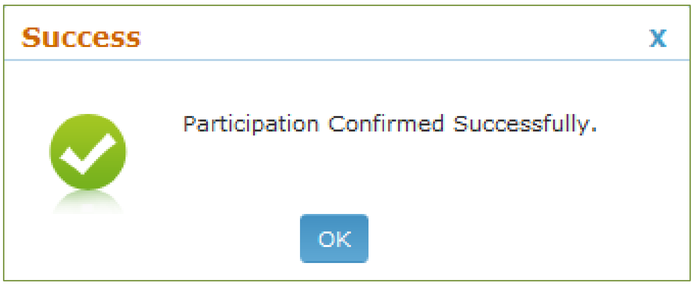

5. Click on **Reject** to reject the terms and conditions. A **Rejection Comments** pop up is displayed.



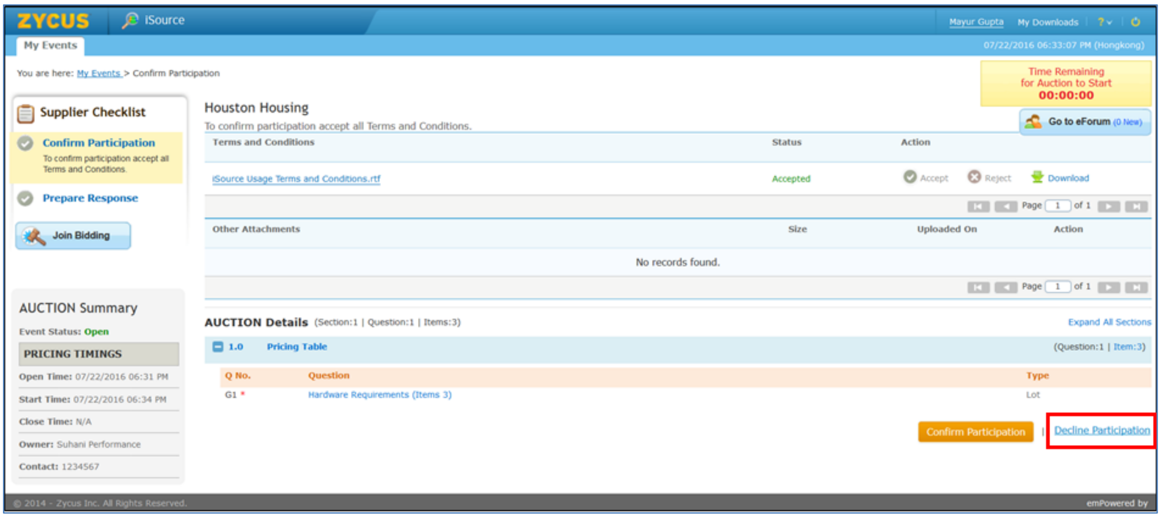

6. Enter the comments for your rejection, and click on **Reject**.
7. After you accept the terms and conditions, you can review RFx event.
8. The RFx event consists of an overview of questions in the **Non-Pricing Decision Factor** and **Pricing Section**.
9. You can view the details by expanding each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

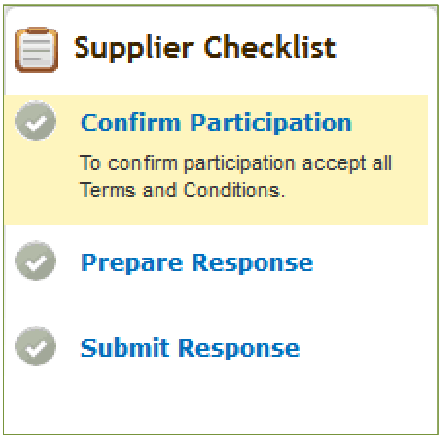



13. Once you review these details, you can decline participation by clicking **Decline Participation**.

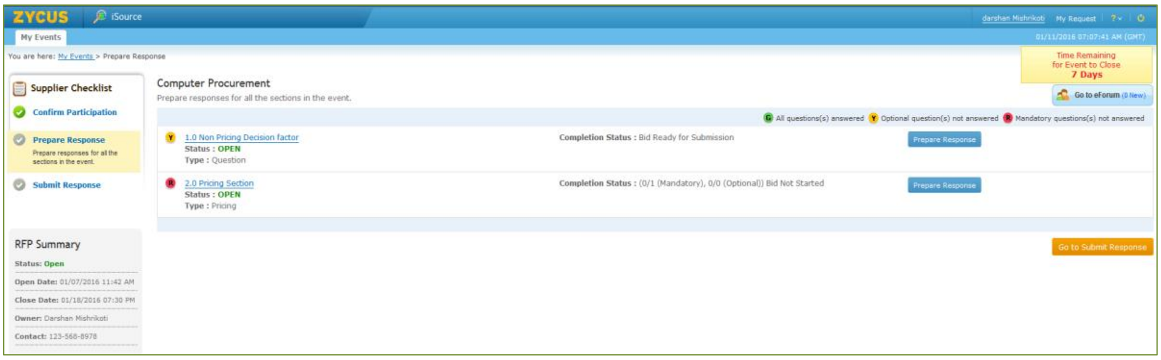



***NOTE:*** If a supplier has declined participation, he can confirm the participation again. However, participation once confirmed cannot be declined.

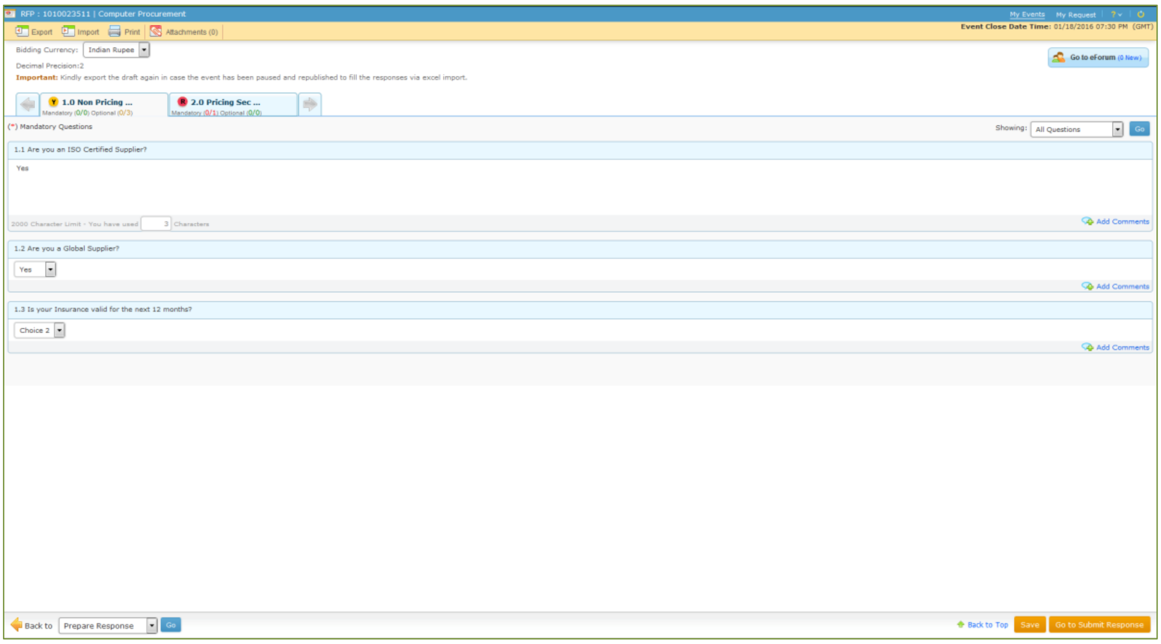
14. To respond to the RFx, there are three tasks to follow:
    - Confirm/Decline Participation
    - Prepare Response
    - Submit Response
15. Once you confirm your participation, you complete the first task off of the **Supplier Checklist**.



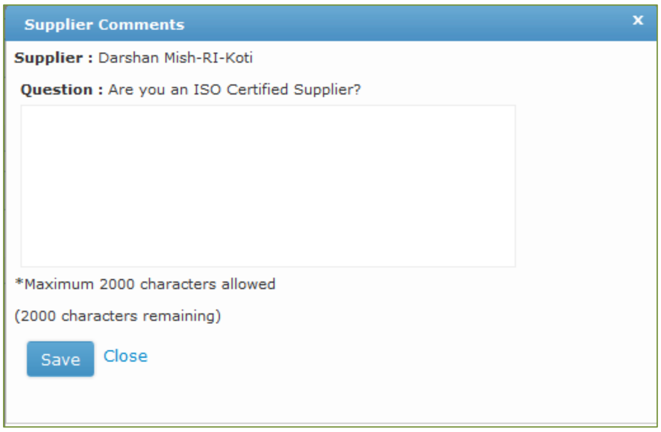

16. Once you confirm participation, you are redirected to the **Prepare Response** page as shown:



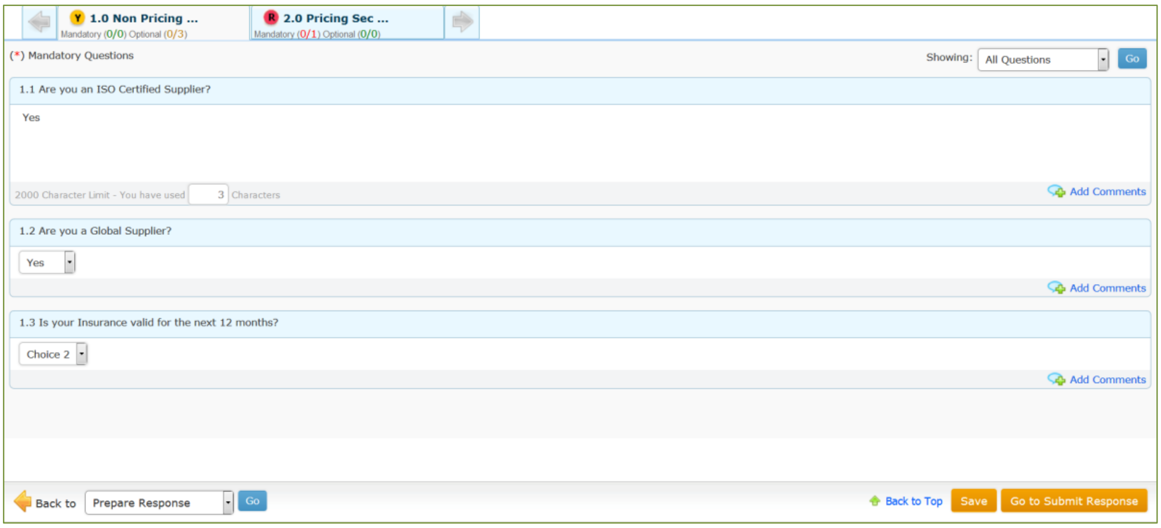

17. You can fill in the responses section-wise by clicking on **Prepare Response** corresponding to a particular section.
18. The RFx editor page to prepare responses is displayed as shown:



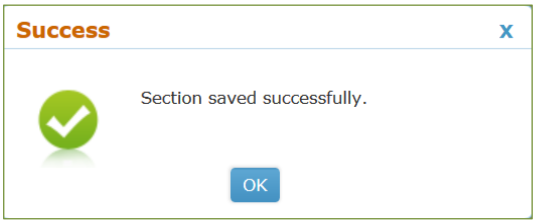

19. Enter your response for a particular section.
20. Click on **Add Comments** to enter comments for a particular question. Following pop up will be displayed:



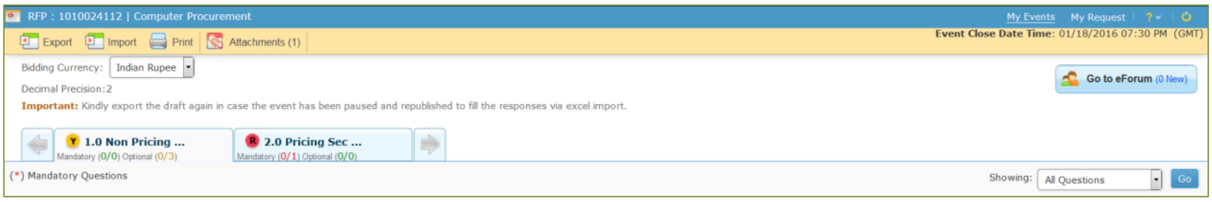

21. Write comment for respective questions and **Save**.
22. After entering your response and comments for one section, click **Save**. It will save the respective sections with the information you have added.



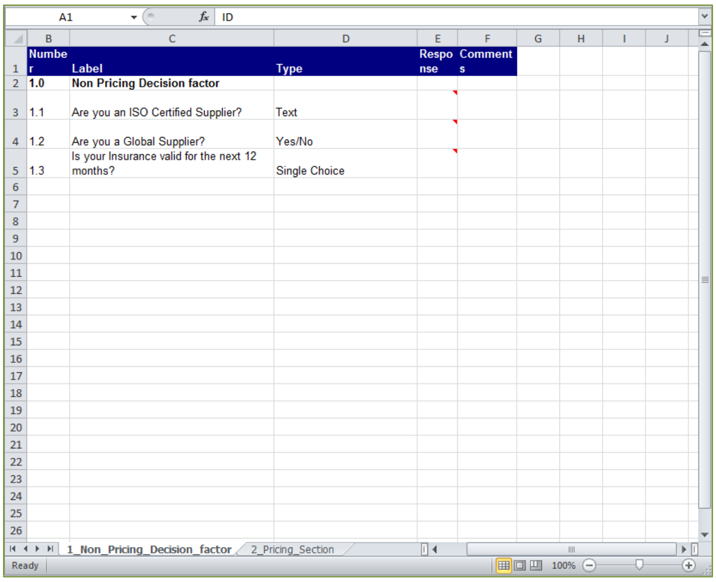

23. On saving, the following popup is displayed:



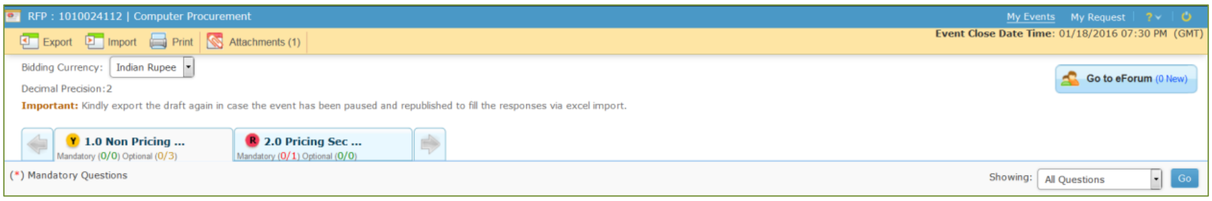

24. Similarly enter your response for other section and save it.
25. iSource allows the user to export the non-pricing questions to MS Excel (.xlsx) to prepare responses offline in the spreadsheet itself, and once the responses are prepared, the same file can be imported in to the iSource tool. All the prepared responses will be uploaded & displayed in the tool.



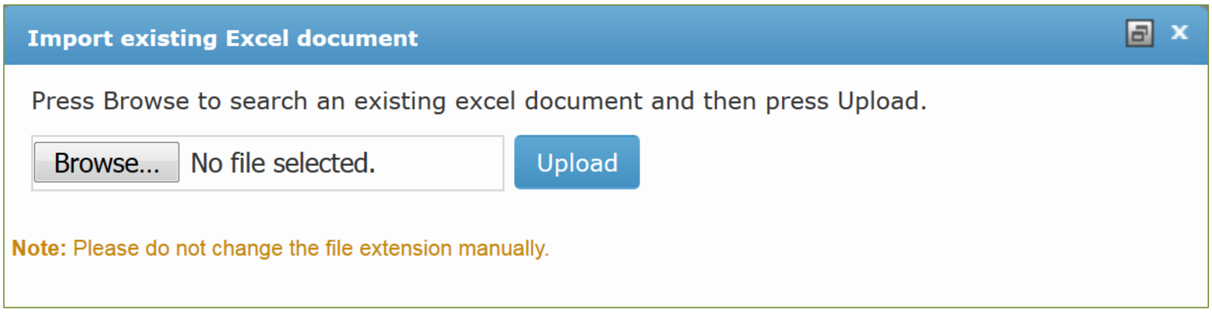
26. Click **Export** > Save the file on your computer > Open the file > Respond to the questions > Save the file.



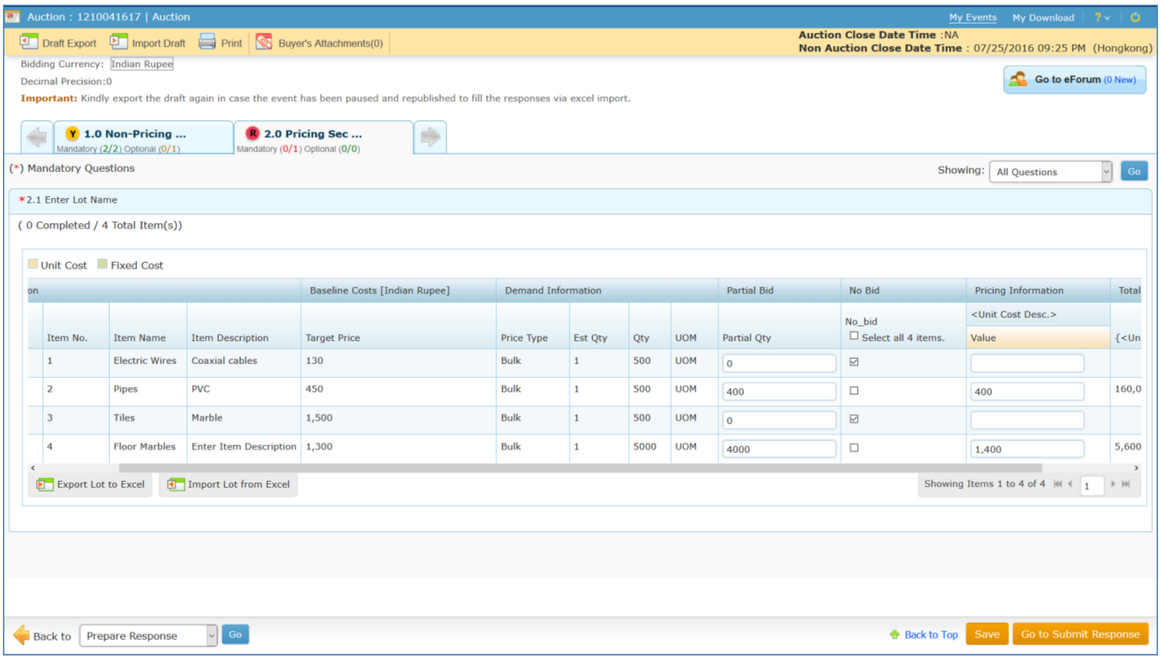

27. To import the file, Click **Import**.




27. **Browse** > **Upload**



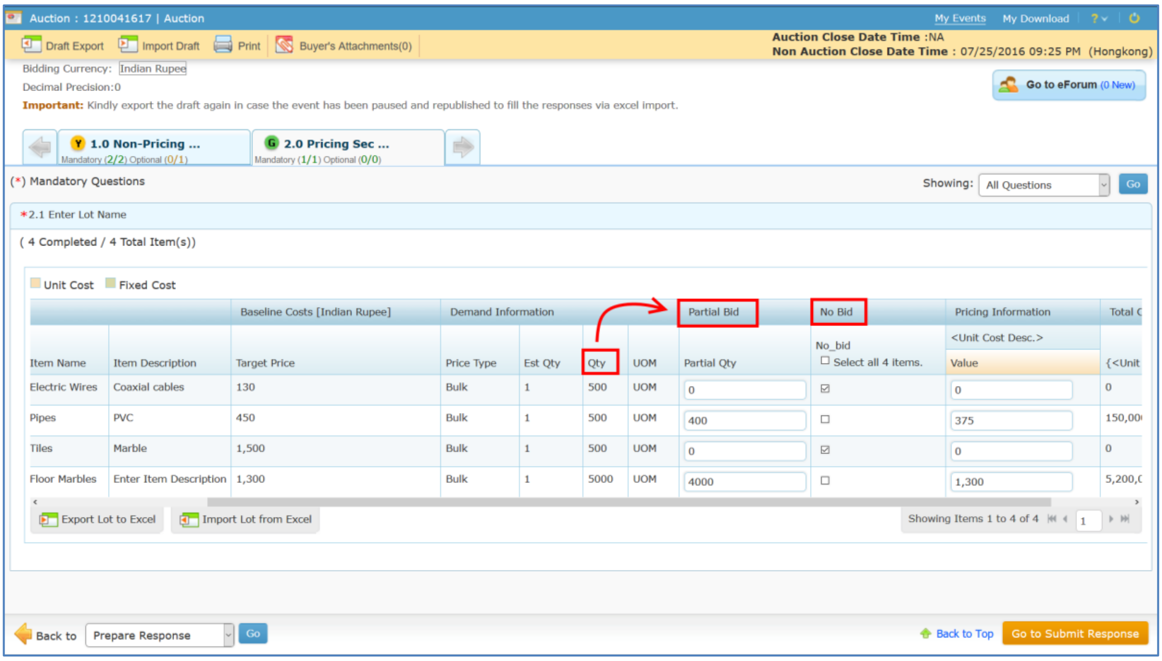

28. If the response consists of pricing section, fill the sections as per each line item. Shown below is an image of pricing table:



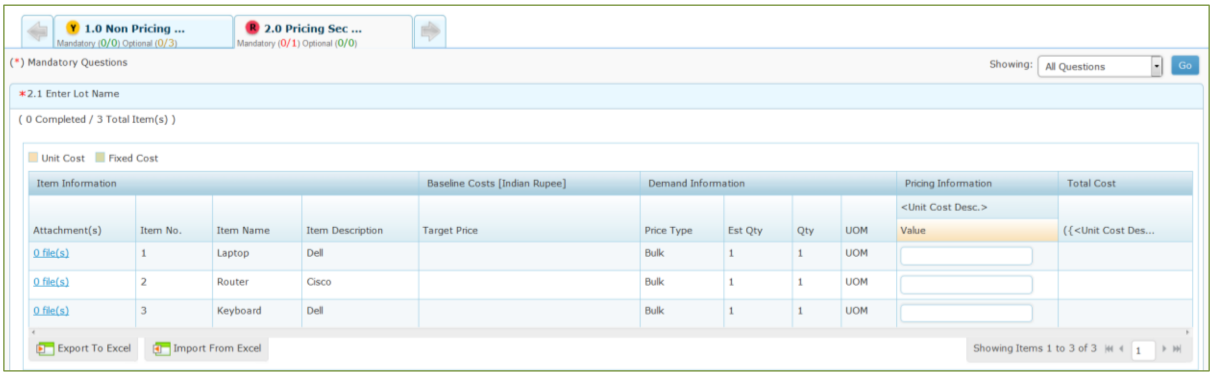
## Bidding Options

**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.

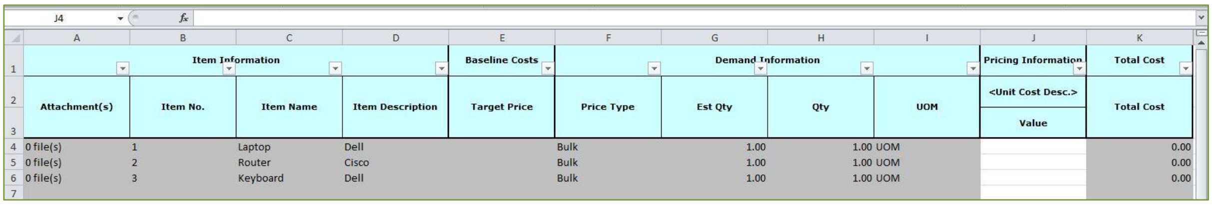
**No Bid:** If the supplier does not want to bid for a particular, he can check the box in "No Bid" column against that line item.



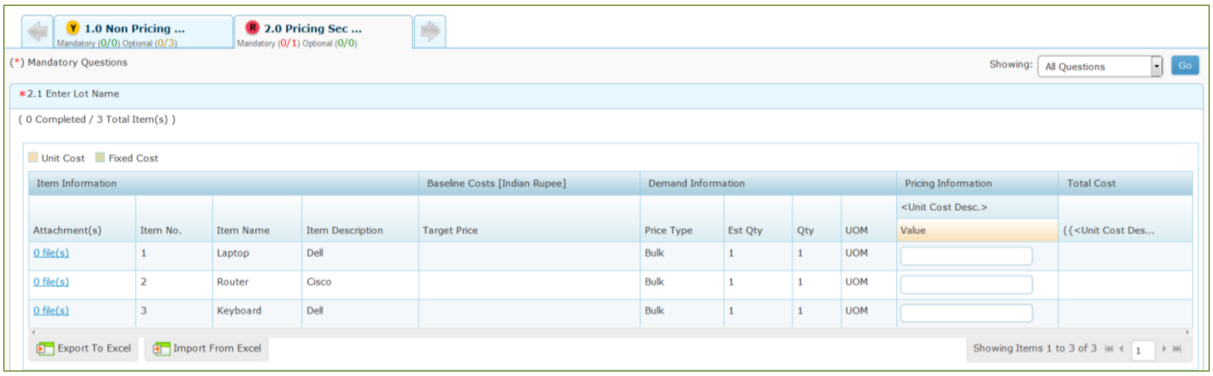
29. Users can also export the **Items Table** to MS Excel (.xlsx) to prepare offline responses in the spreadsheet. Once the responses are prepared, the same file can be imported into **iSource** tool.



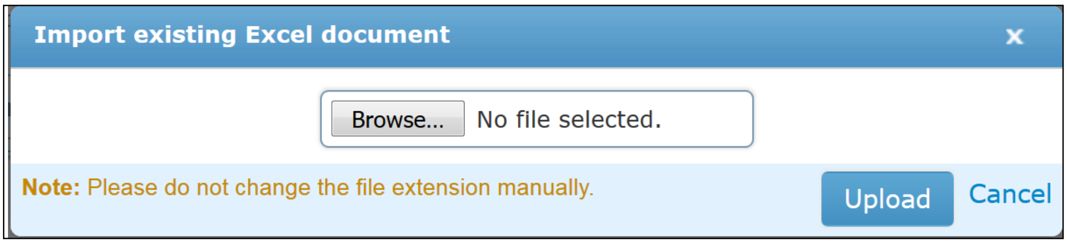

30. Click on **Export** > Save the file on your computer > Open the file > Fill your responses > Save the file.



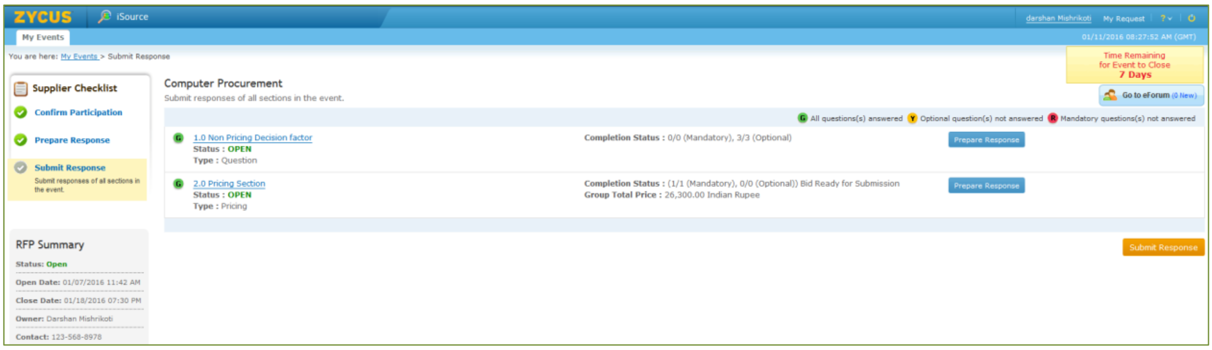
31. To import the file, Click **Import**.



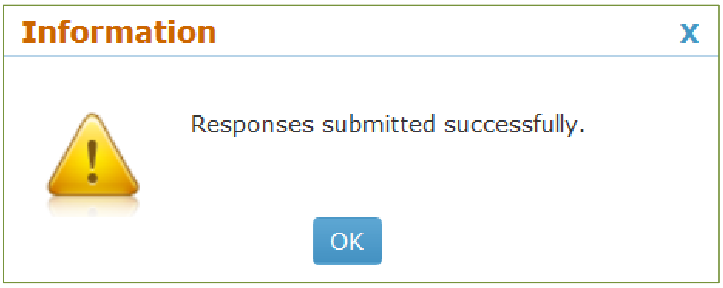

32. **Browse** > **Upload**




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

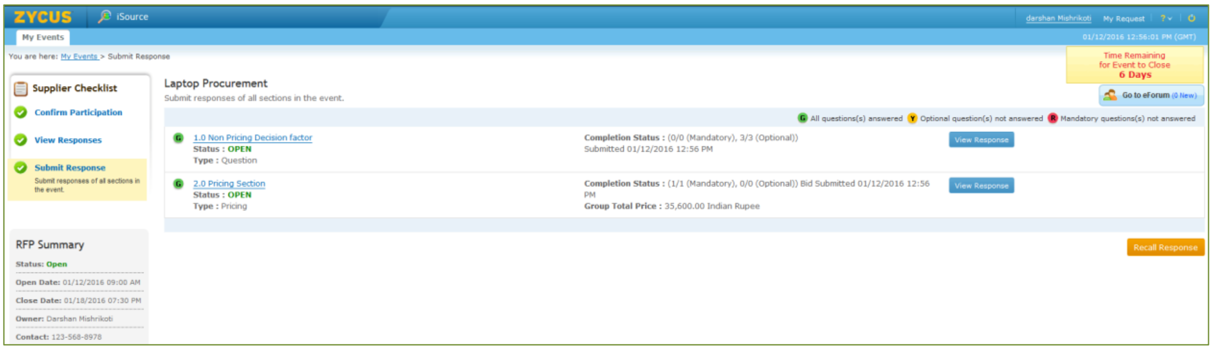



33. Click on **Submit Response**, following popup is displayed:

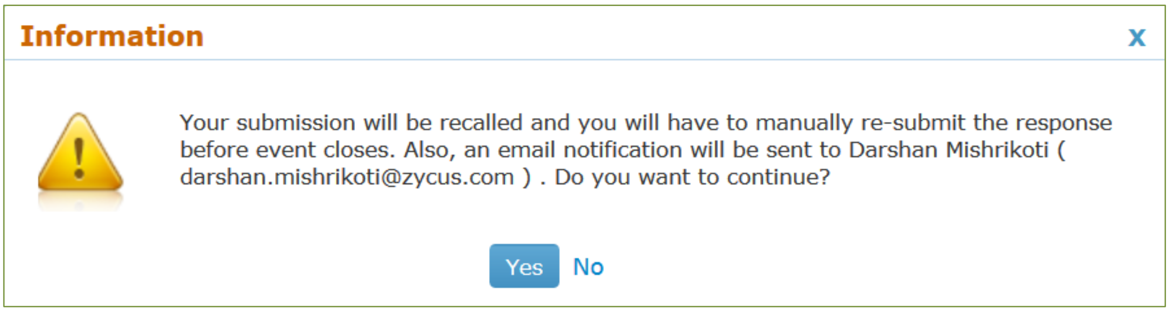



## 6.6.2 <u>How Can I Recall My Response?</u>

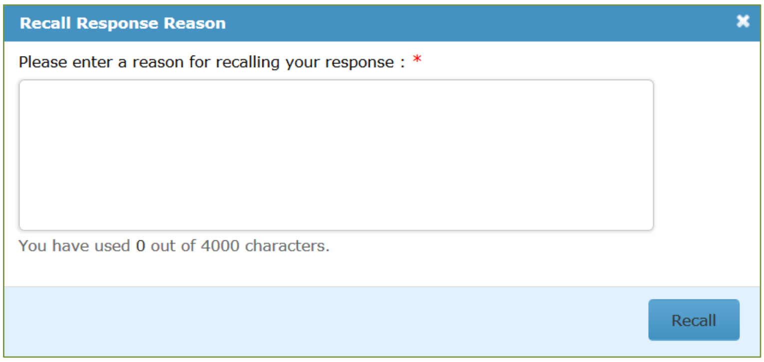
1. A response to RFP and RFQ events can be recalled only if that event is open.
2. Open the event whose response you want to recall, you will be redirected to following page:



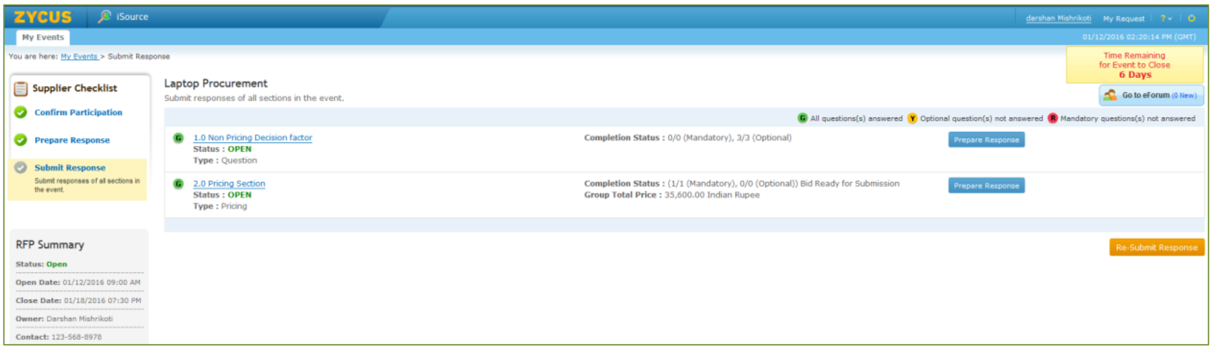

3. Click on **Recall Response**. Following popup will be displayed:




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.**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### 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.

Dear francis Capola,

In response to your submission, Training has sent edited pricing for your review and approval.
Please log into iSource and provide your response at the earliest.

Details:
From - Training
Sourcing Professional: Francis Capola Sourcing Professional Email: francis.capola@zycus.com

RFP Name: Content Team
Round: 1

Your username is: FRANCIS29677
Link for Content Team:
https://sourcing.zycus.com/demo/supplierSide/supplierStaticPage.pfm?pageAction=negotiationSection&responderDocumentID=98939&docID=76927

Zycus TECHNICAL SUPPORT
If you need assistance for the use of our Zycus iSource application please contact Zycus Technical Support by clicking the Technical Support link on https://sourcing.zycus.com/demo/login.htm .

Regards,
Technical Support Team
Zycus iSource

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 |
|---|---|---|---|---|---|---|---|---|
| 1010023511 | Laptop Procurement | Darshan Mishrikoti | 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**.

**Supplier Checklist**
- Confirm Participation
- View Responses
- Submit Response
- Approve Negotiated Pricing
  Review and approve Negotiated Pricing.

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.


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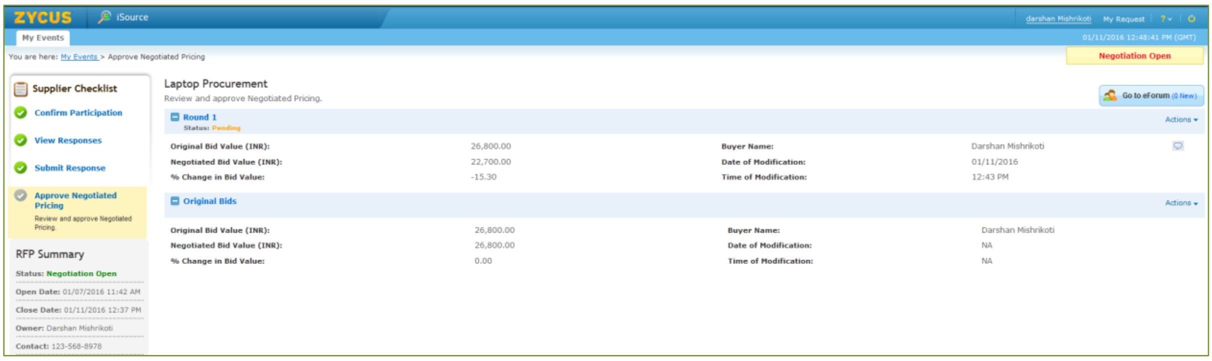
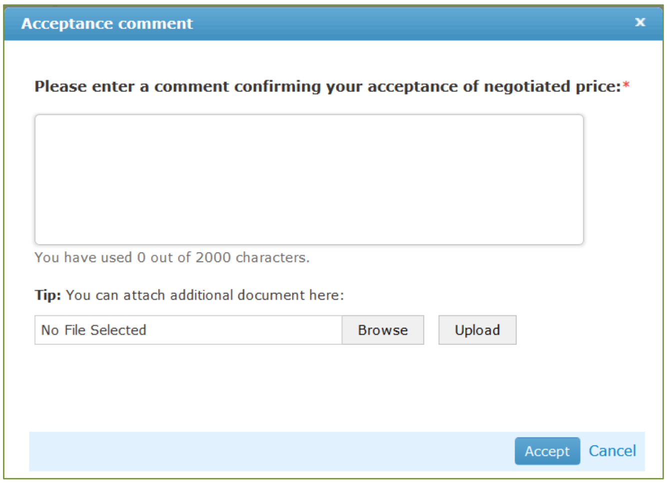


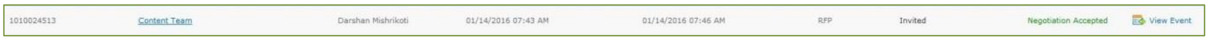

5. After entering the event, under the **Actions** tab, supplier can either **Accept, Reject**, or **Export Pricing Details**.


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

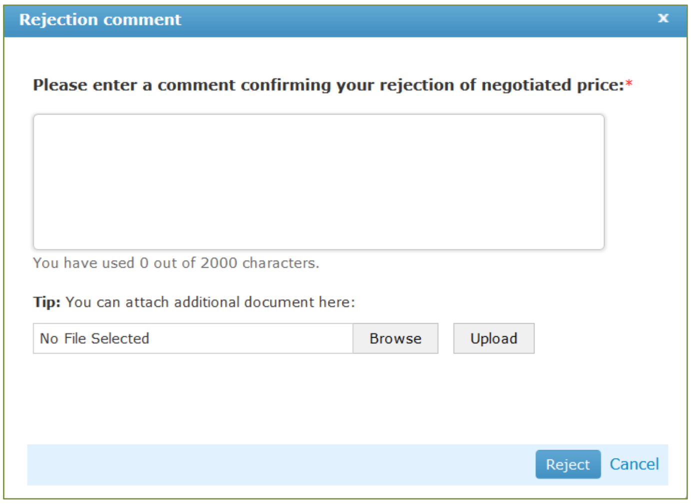



7. In **Acceptance Comment** box, enter your comments for confirming the acceptance of negotiated price and click on **Accept**.
8. Once you accept the negotiation, the status changes to **Approved**.

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

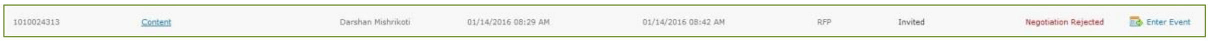



10. To reject, click on **Reject** from **Actions** drop-down list.

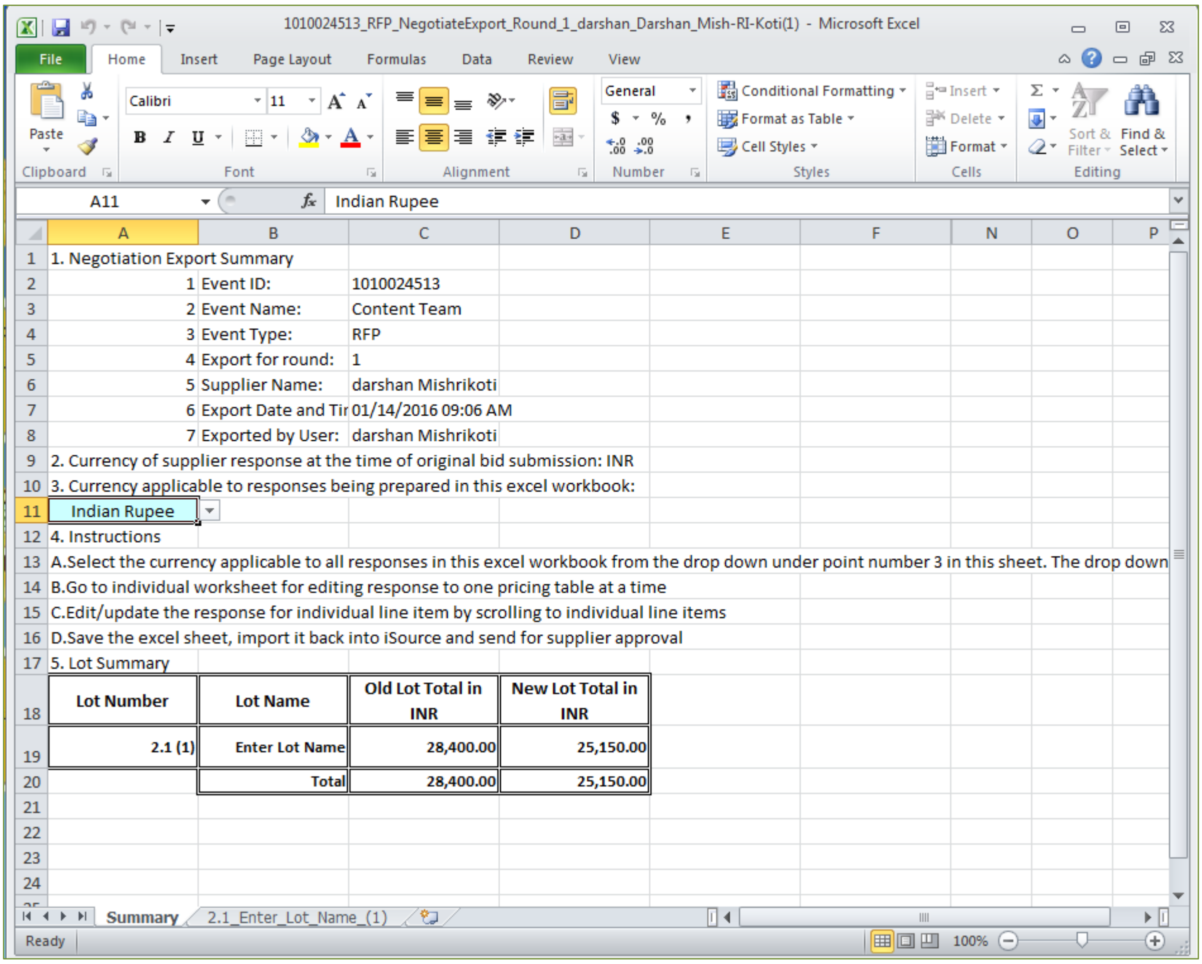



11. In the **Rejection Comment** box, enter your comment to confirm your rejection or negotiated price.
12. Once you reject the negotiation, the status changes to **Rejected**.

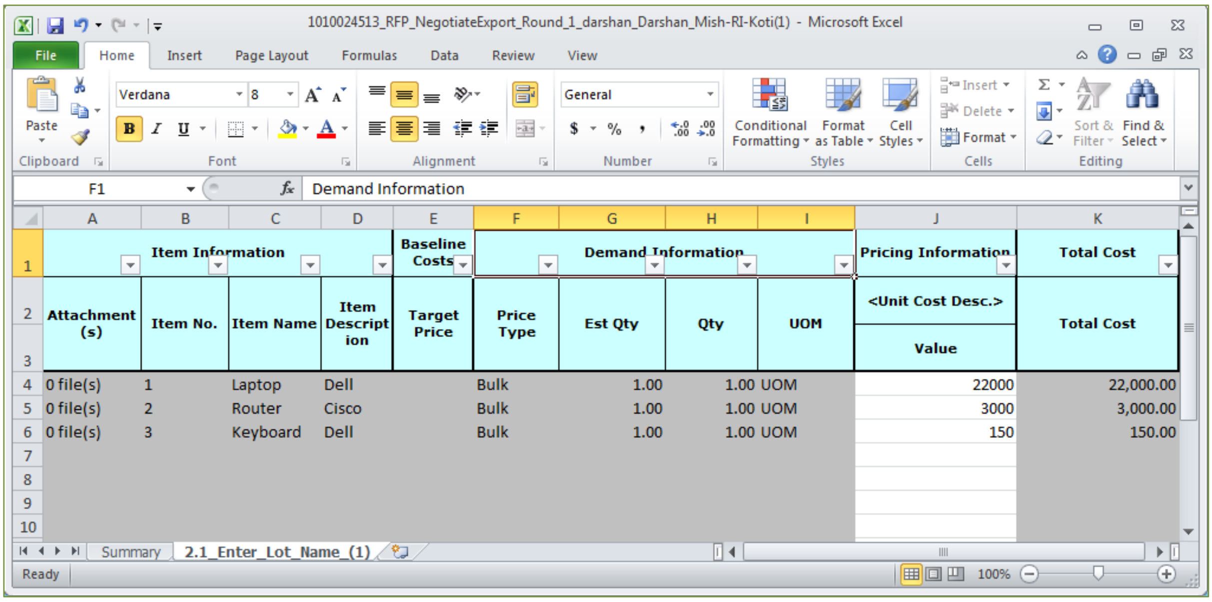

13. The status for the event on **My Events** page will get changed to **Negotiation Rejected**.




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.

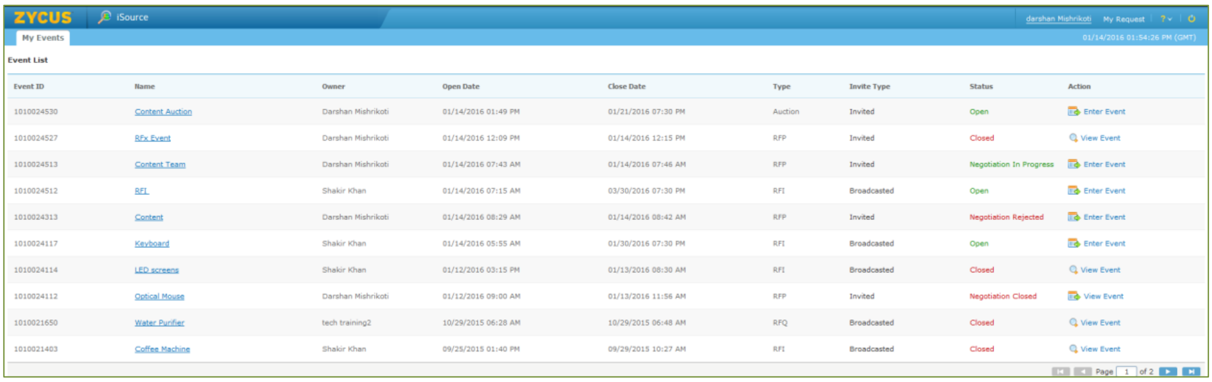



17. The next tab in the spreadsheet displays details on negotiated baseline cost for items in the item table.



### 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.

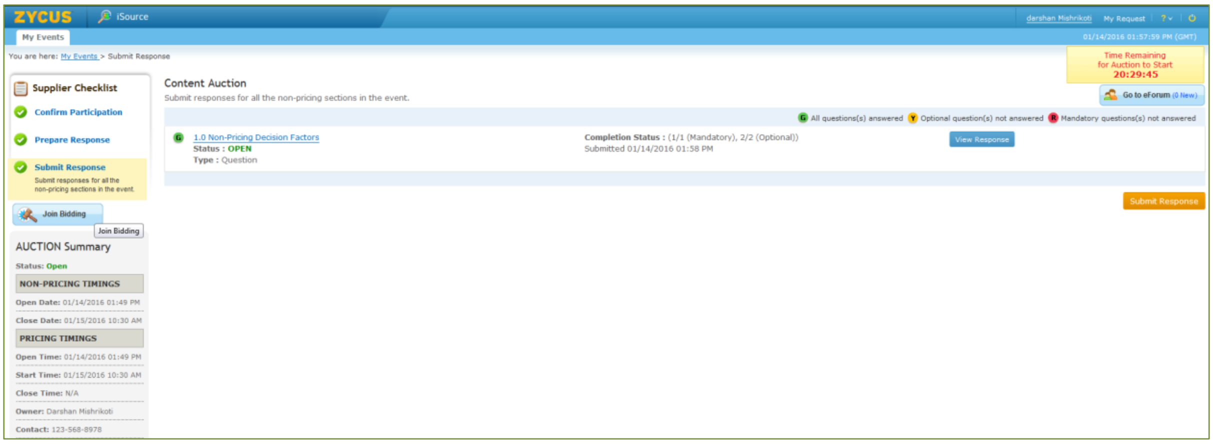



2. Select the **Auction** you want to join, and then click **Enter Event**.

Follow the steps from Enter an Event.

### 6.6.5 How to Join Bidding?

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




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: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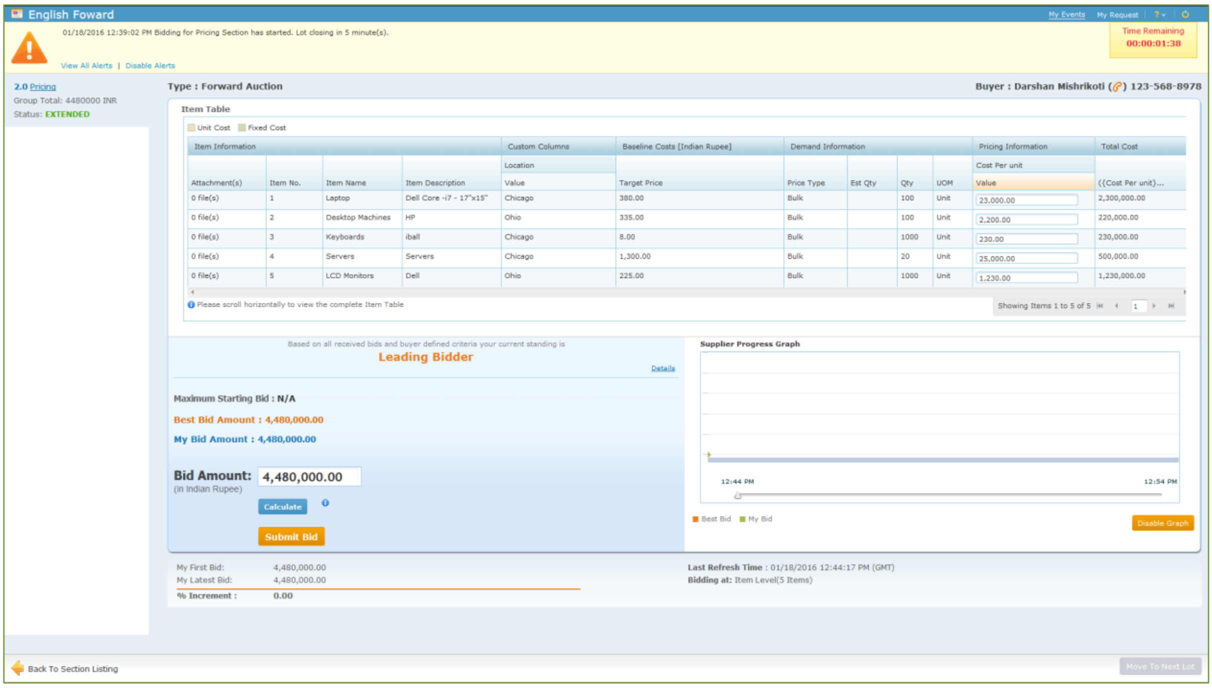
| Option | Description |
|---|---|
| **Forward Auction** | In forward auction, bidding starts at minimum acceptable price and increases with every new bid by a fix increment. |
| **Reverse Auction** | In reverse auction, bidding starts at acceptable price and decreases with every new bid by a fix decrement. |

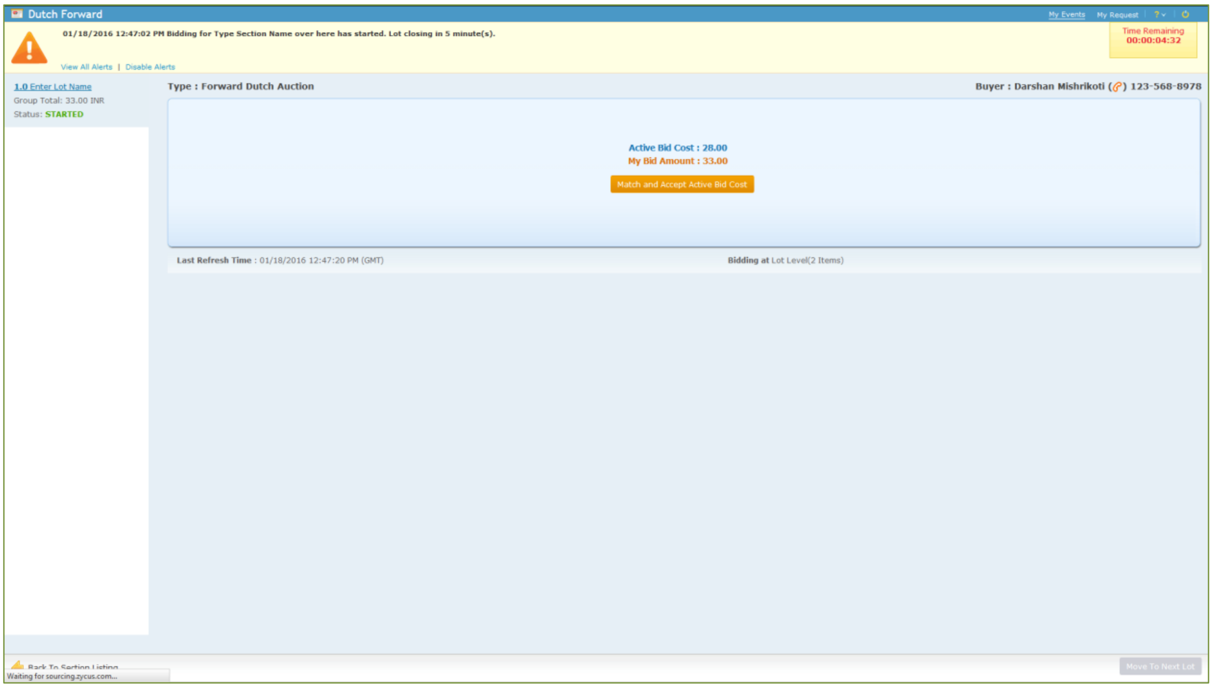
**4.** After you click on **Join Bidding**, the **Forward Auction** page is displayed**:**




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

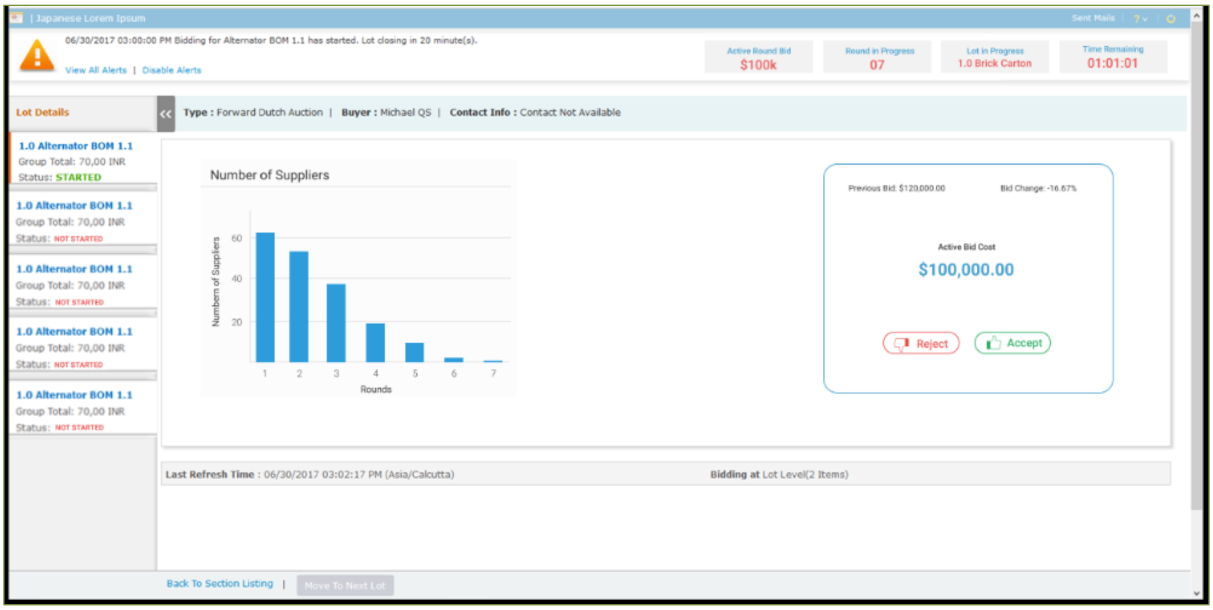
| Option | Description |
|---|---|
| **Forward Dutch Auction** | In Forward Dutch auction, buyer increases the cost, till supplier accepts the active bid cost. |
| **Reverse Dutch Auction** | In Reverse Dutch auction, buyer reduces the cost, till a supplier accepts the active bid cost. |

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



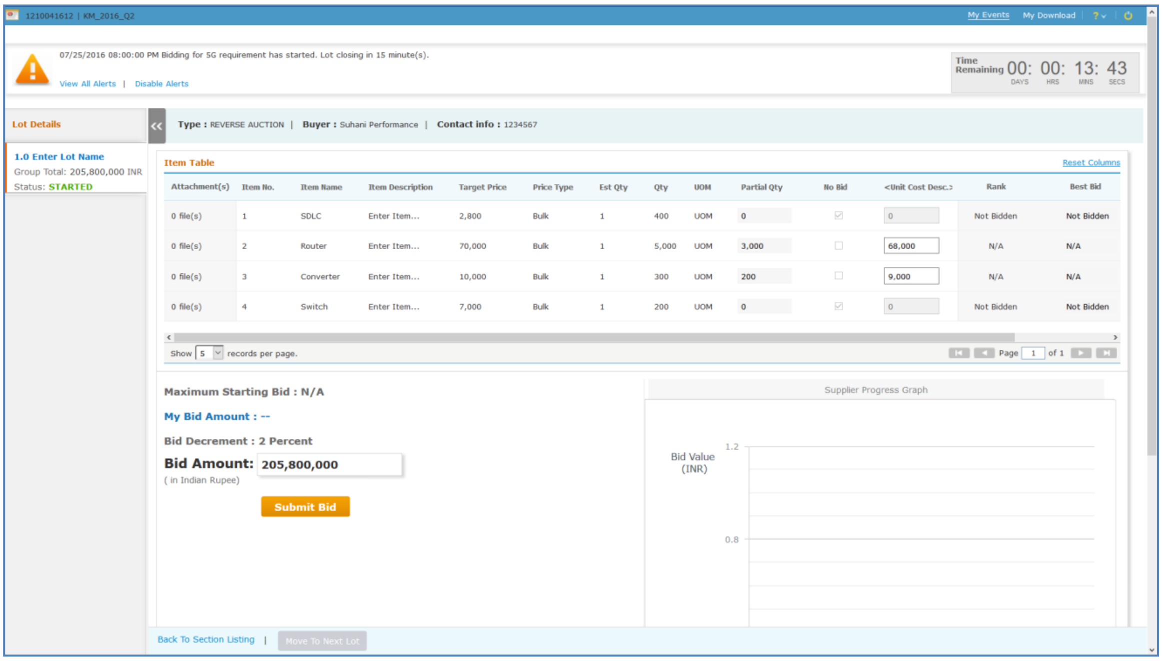

7. In **Japanese Auction**, under **General Japanese Auction Settings**, there are two auction types:

| Option | Description |
|---|---|
| **Forward Dutch Auction** | 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. |
| **Reverse Dutch Auction** | 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. |

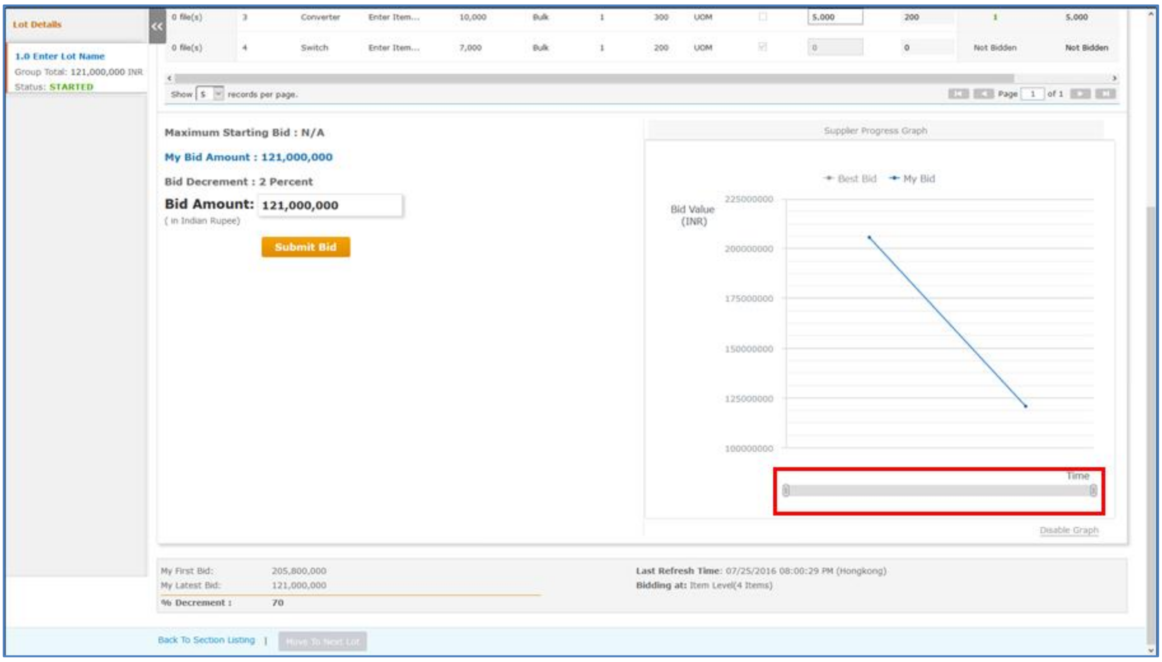



### 6.6.5.2 *Line Level Bidding*

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



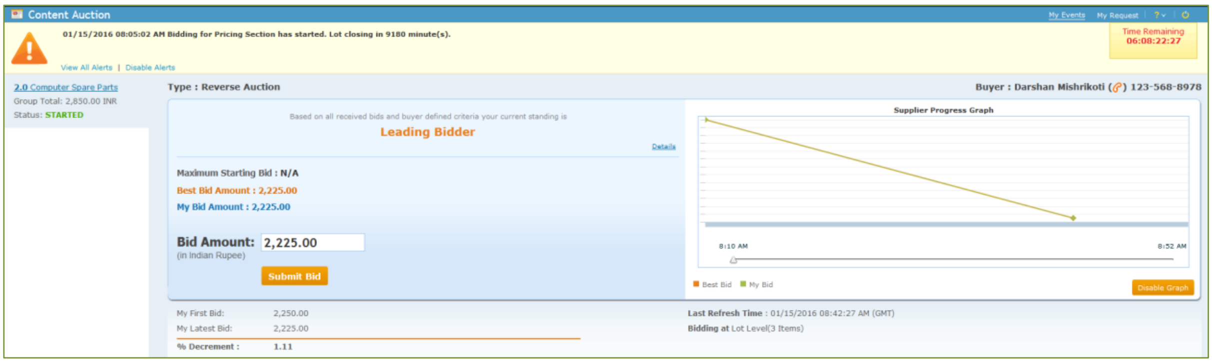

2. Enter your bid amount at line level and click on **Submit** to submit the bid.
3. The graph will show your bidding history since the start of auction.



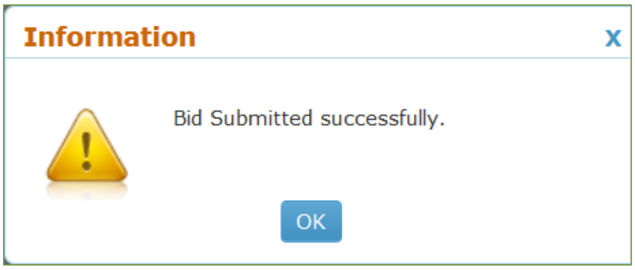

4. To get information for particular time period, use the scroll bar *(highlighted)* to narrow down the time frame.

#### *6.6.5.3 Lot Level Bidding*

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

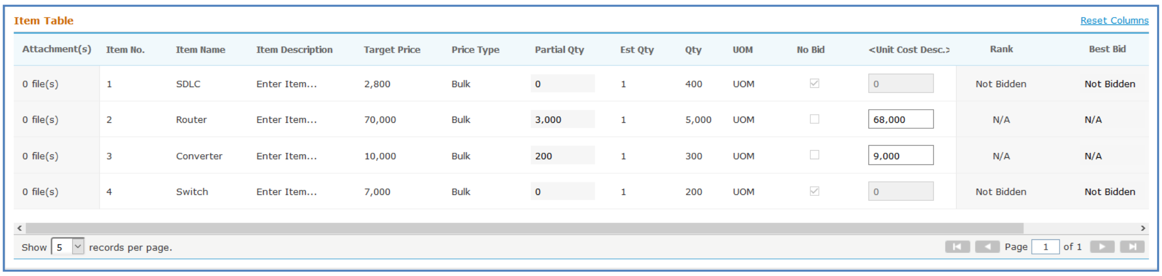



2. After changing the price, click on **Submit Bid**. The following popup will be displayed:



### 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.

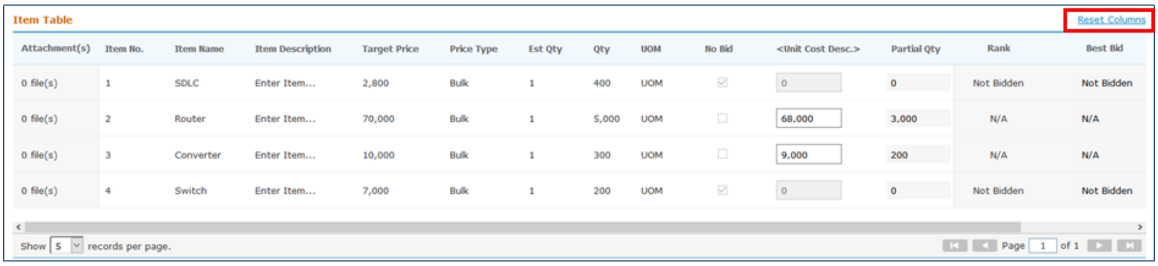


Item Table — Reset Columns

| 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 |

Show 5 records per page. Page 1 of 1

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



Item Table — Reset Columns

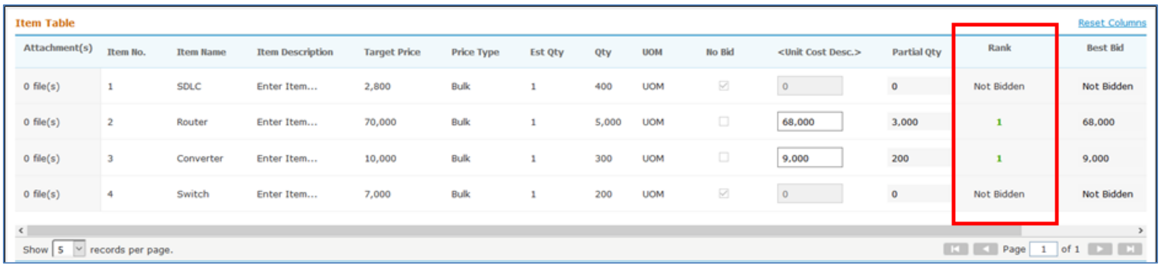
| Attachment(s) | Item No. | Item Name | Item Description | Target Price | Price Type | Est Qty | Qty | UOM | No Bid | <Unit Cost Desc.> | Partial Qty | Rank | Best Bid |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0 file(s) | 1 | SDLC | Enter Item... | 2,800 | Bulk | 1 | 400 | UOM | | 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 |

Show 5 records per page. Page 1 of 1

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.



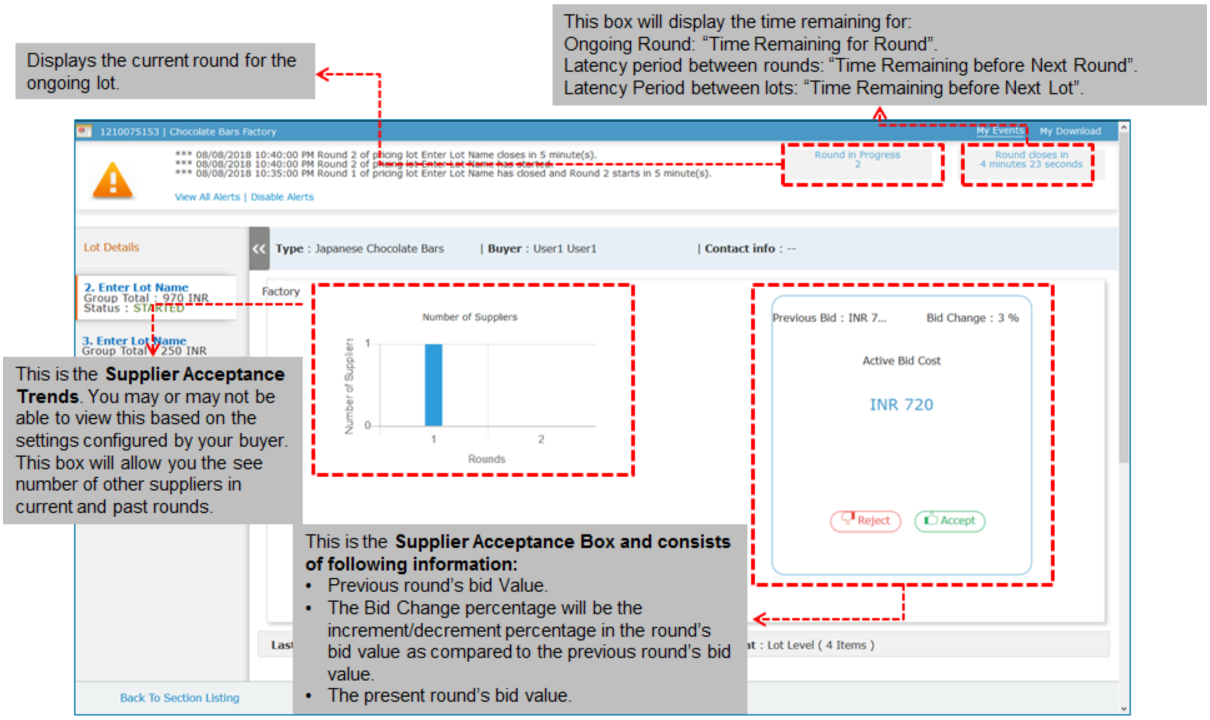
Item Table — Reset Columns

| 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 |

Show 5 records per page. Page 1 of 1

### *6.6.5.6 Japanese Auction Bidding Page*

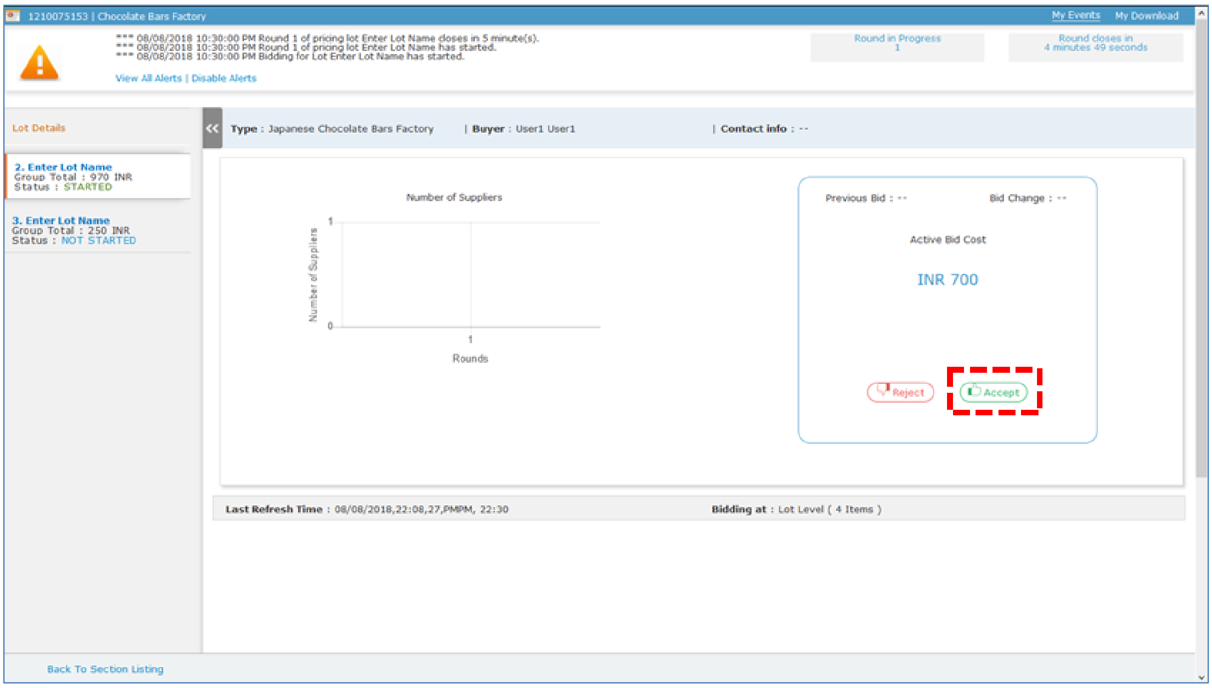
Shown below is the overview of the Japanese Auction page.



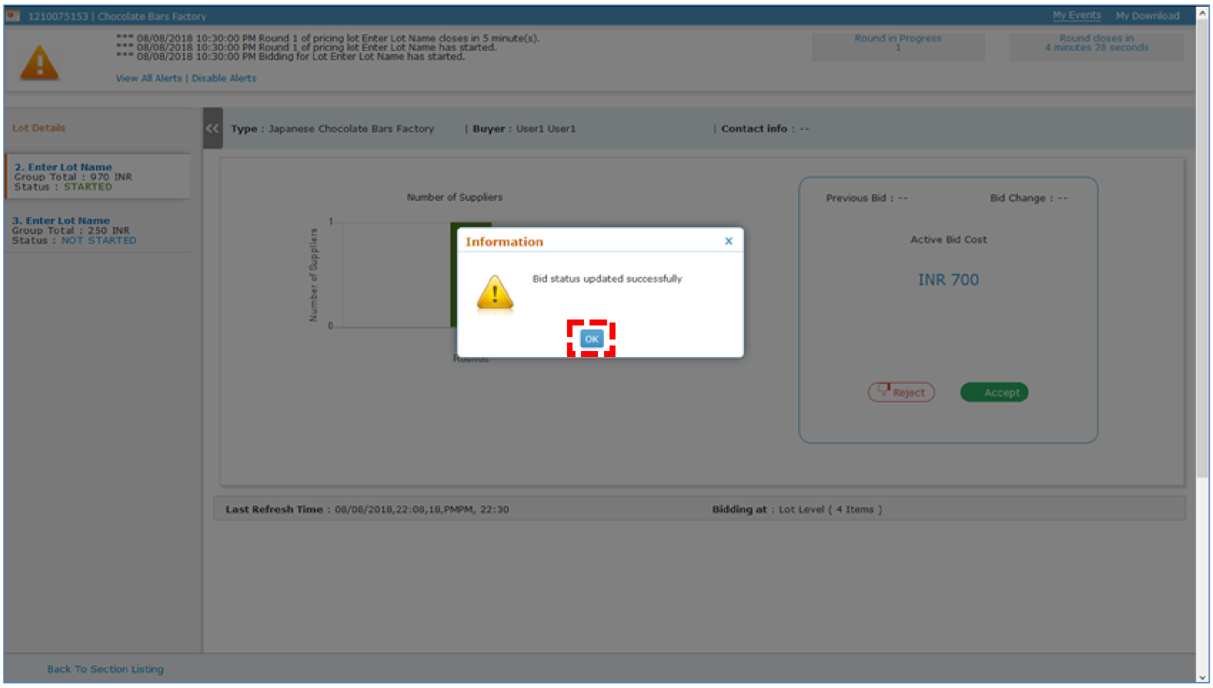

Japanese Auctions are carried out in lots. Every pricing lot in an event can have 'n' number of lots. For a given pricing lot, let's take a look at how you can bid.

## Responding to the Rounds of Pricing Lot

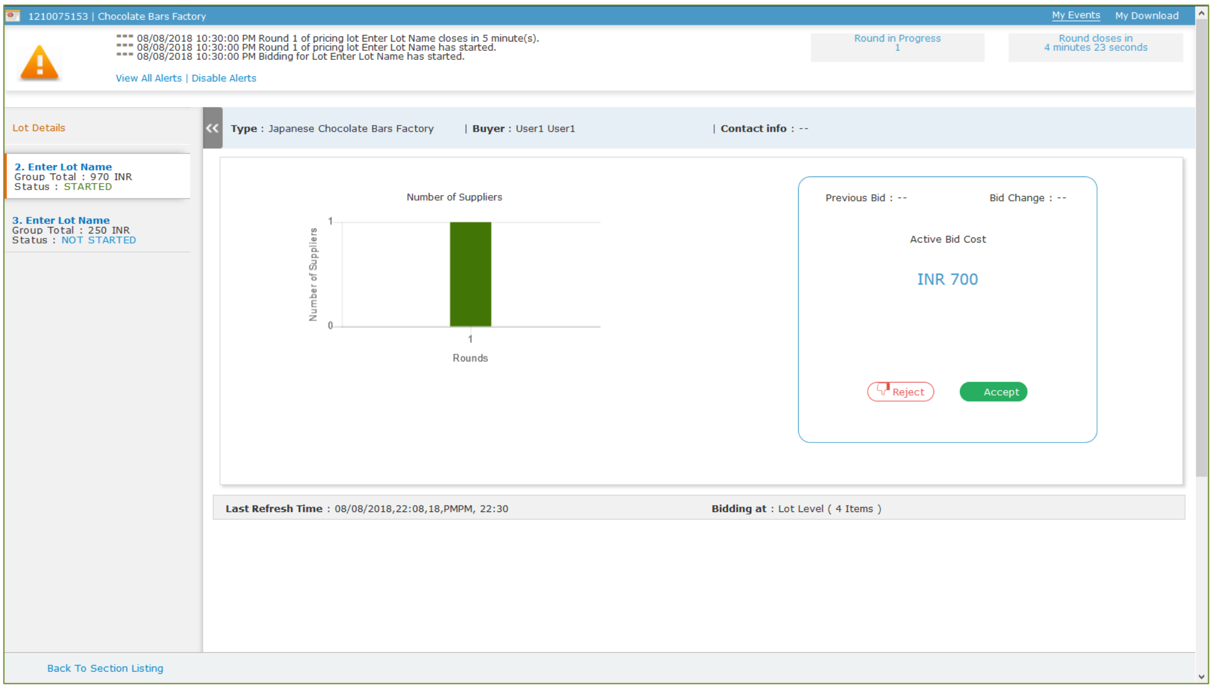
1. The auction will progress one lot at a time. The auctions, once started will provide you with an **Active Bid Cost** for a lot whose response you have already submitted. Reviewing the **Bid Cost** and you can choose to **Accept** or **Reject** it.



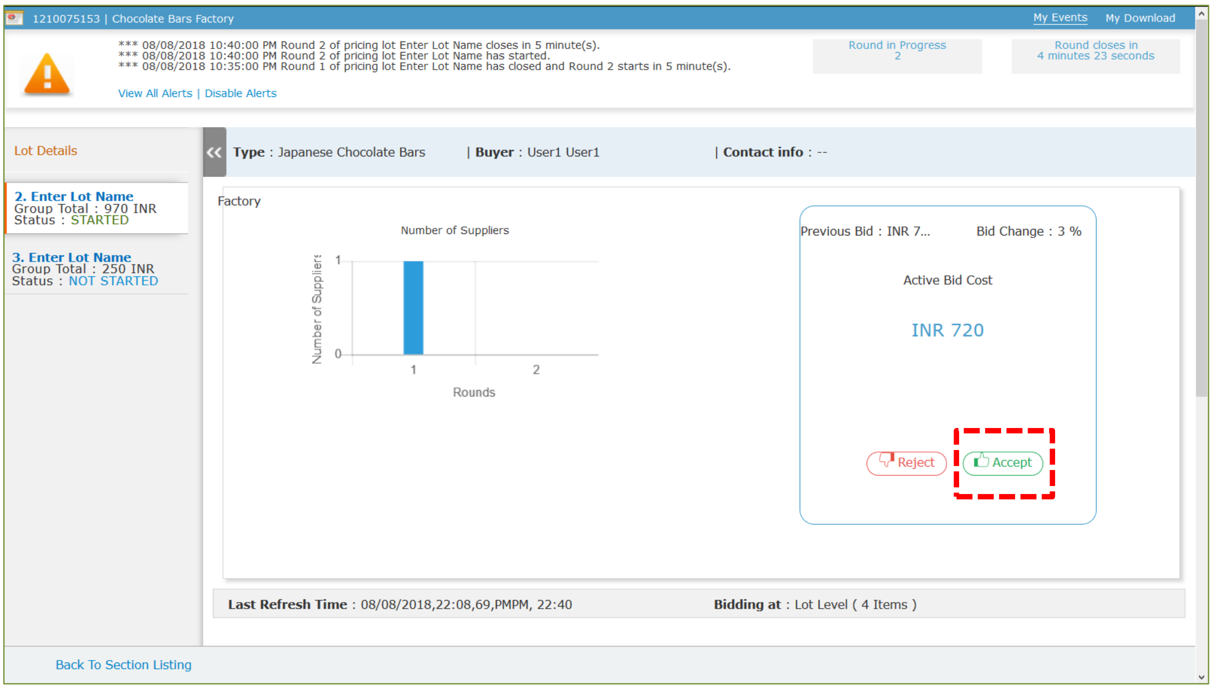

2. Upon acceptance, you will see the following popup. Click **OK.**



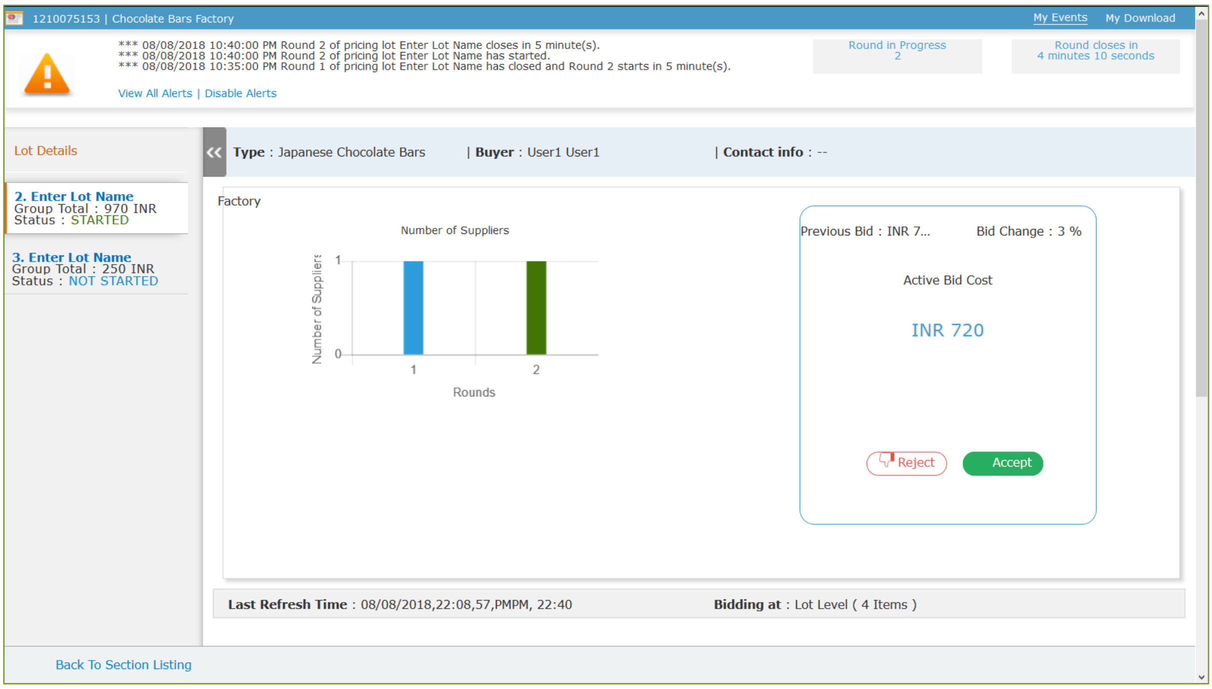
3. Your bid will be recorded and you will be able to proceed to the next round when it becomes active.




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.

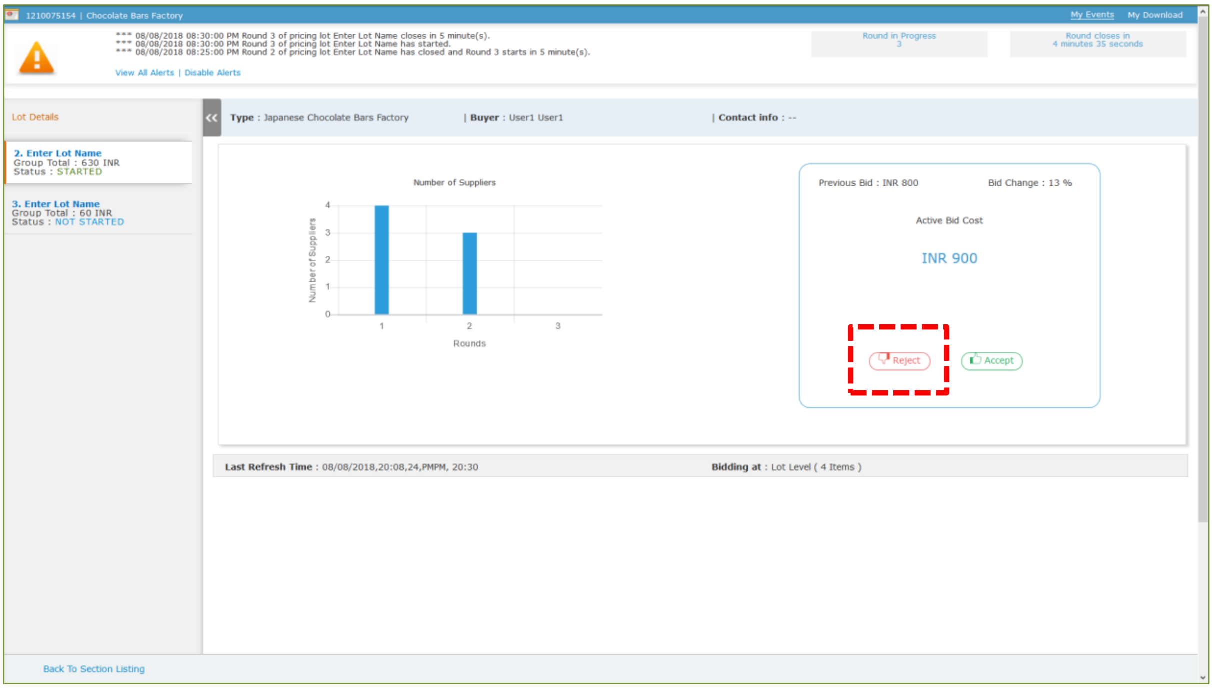



5. Once you have accepted your bid, you can wait for the next round to become active to participate. Here the **Green** bar in the **Supplier Acceptance Trends** graph denotes on-going event.




## 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**.



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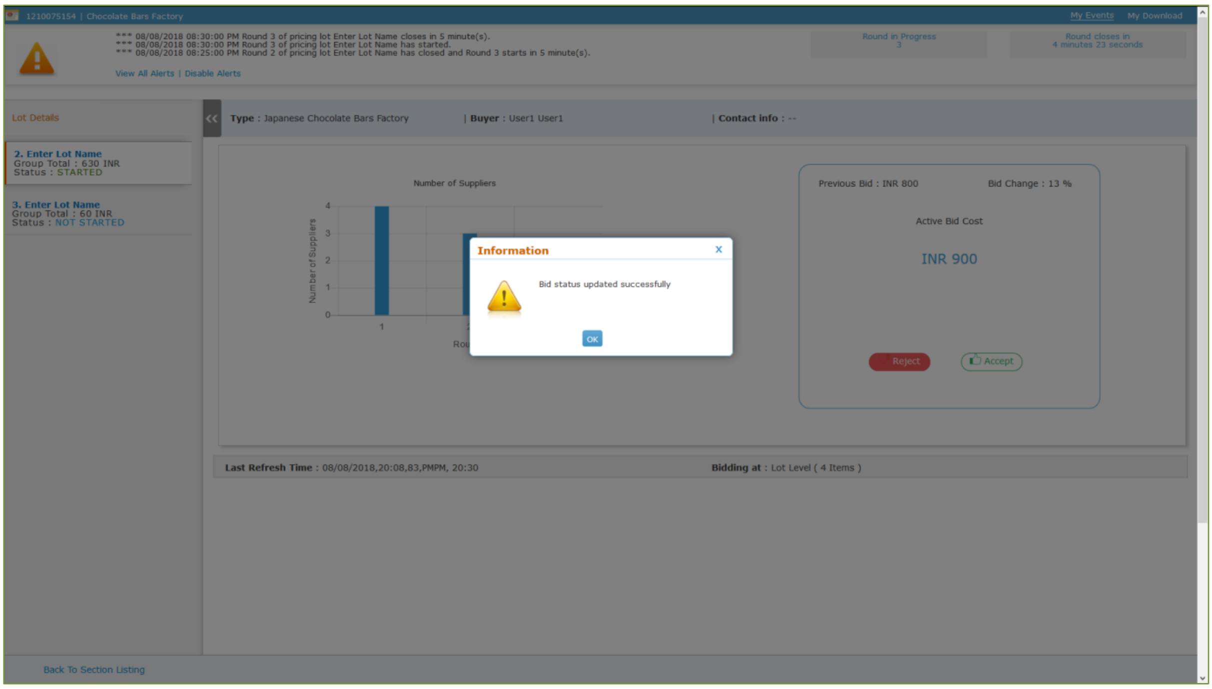
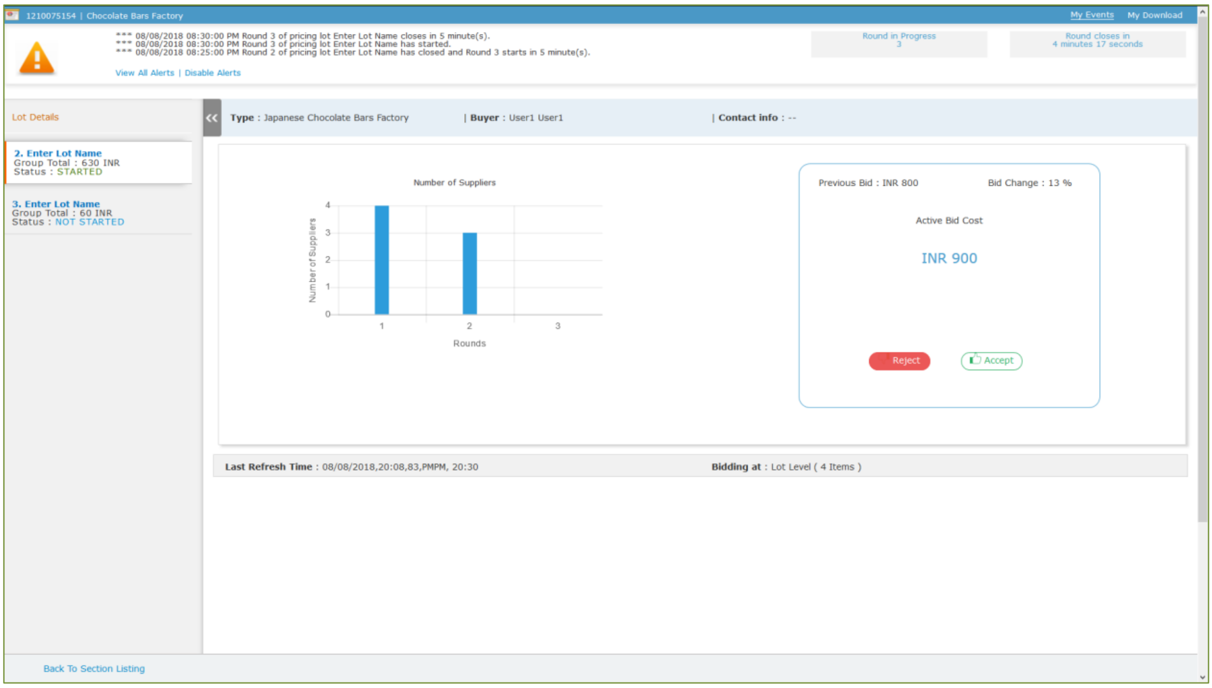


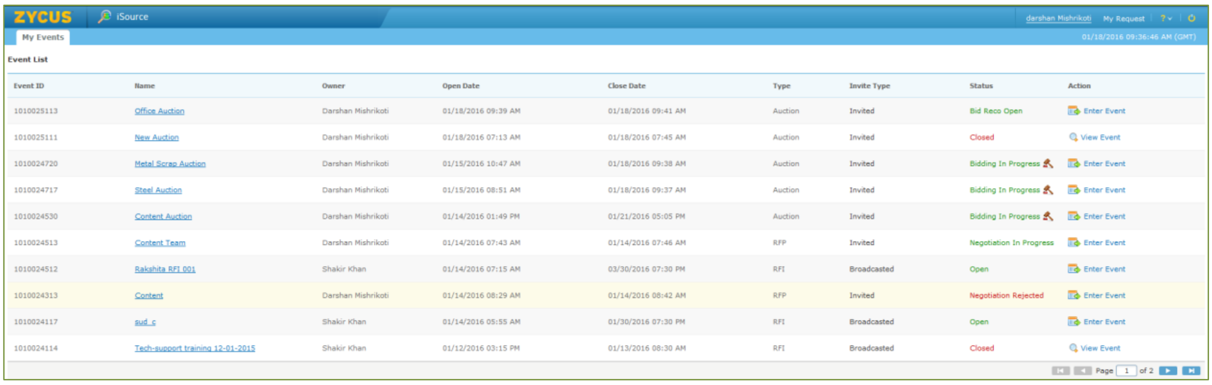

3. In the scenario you have already rejected the bid even with the time remaining in the round to close, you can change his selection to **'Accepted'**. But once you have changed it to **'Accepted'**, you cannot change it back to **'Rejected'**.



### 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.

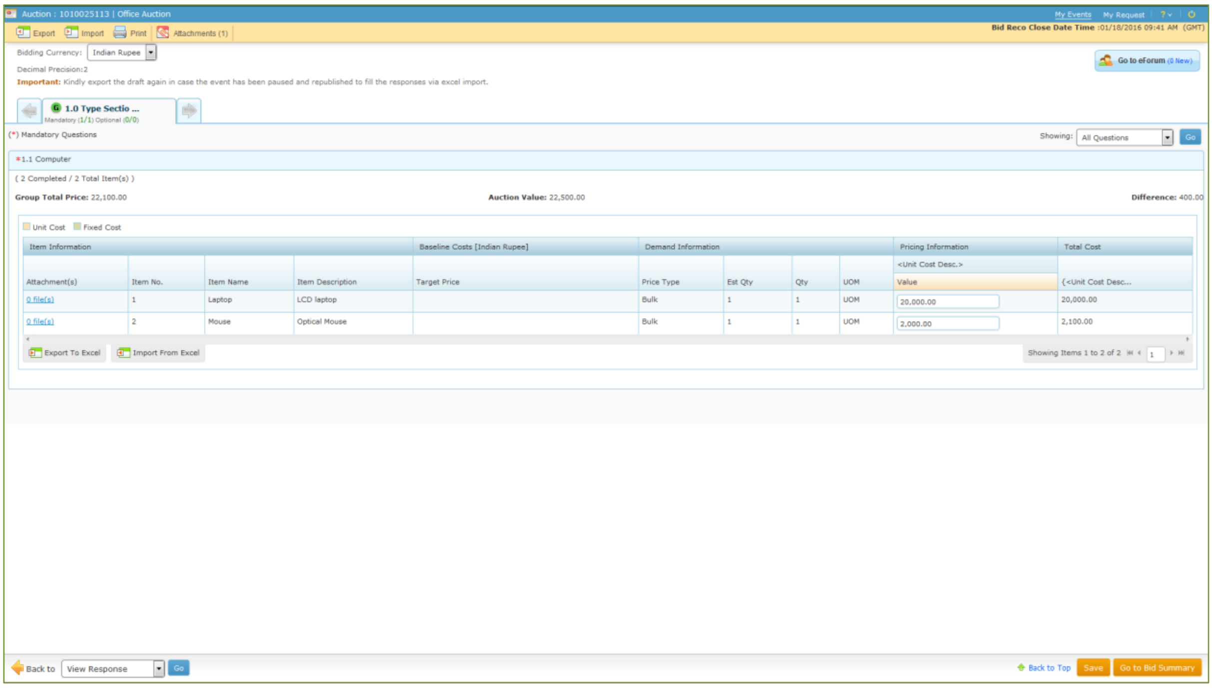
2. When buyer initiates **Bid Reconciliation**, you can view that in the Status of the auction as **Bid Reco Open**.



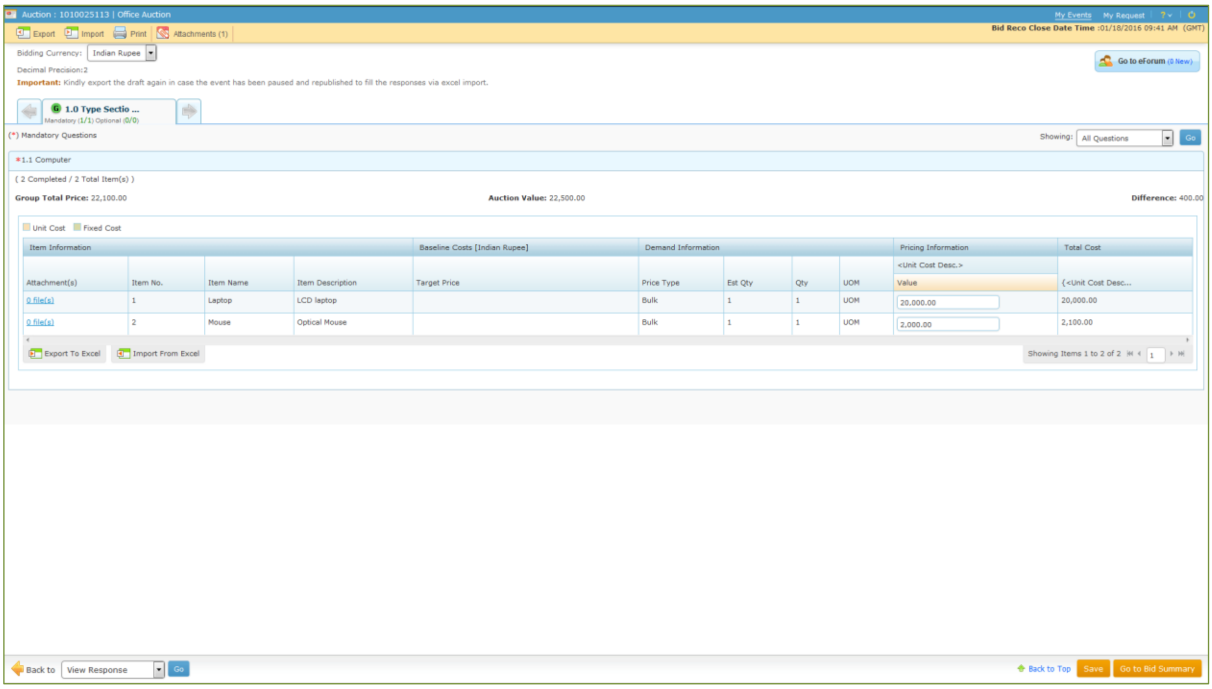
3. Click on **Enter Event**.
4. On entering the event, the following page will be displayed:

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:



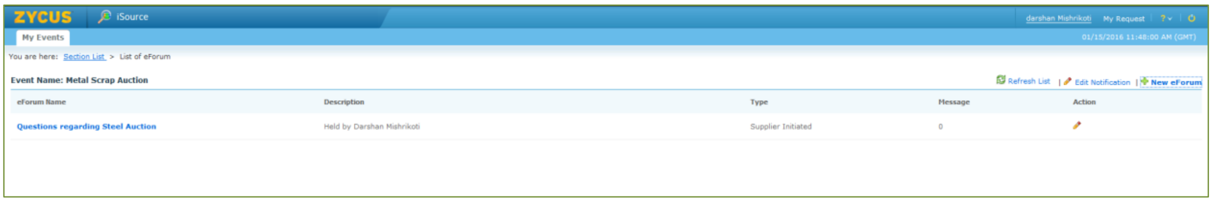
7. Change the prices in **Pricing Information** and click on **Save**.



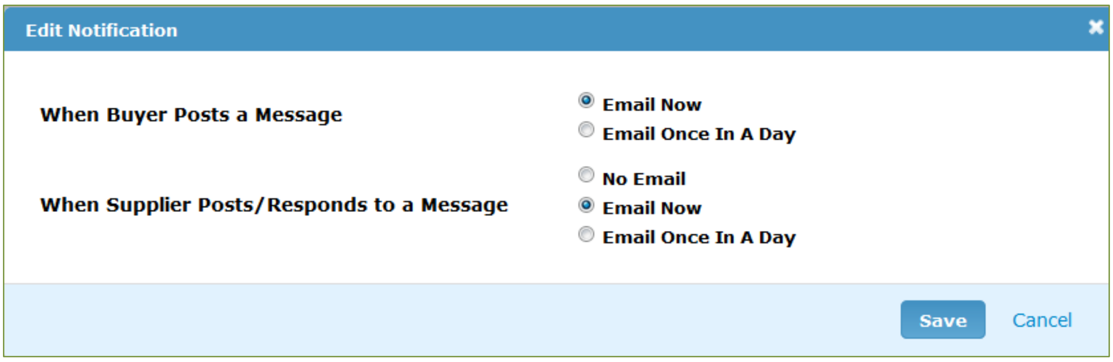
8. On saving revised price, a confirmation popup will appear. Click **OK**. The revised bid will be sent to the buyer.


### 6.6.7 From Where can I Access eForums?

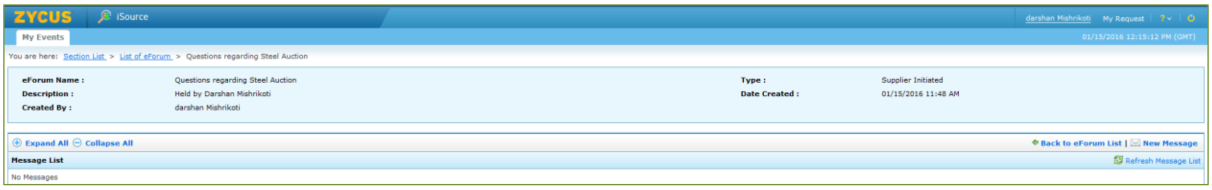
1. Click on **Go to eForum**. The following page will be displayed:



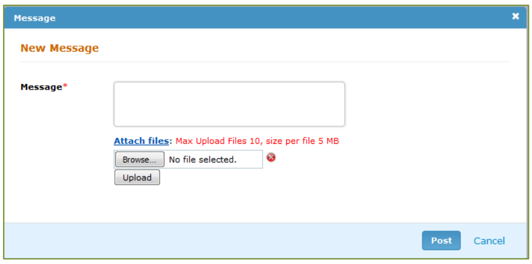

2. You can either initiate an eForum by clicking **New eForum** or visit an existing eForum created by a buyer.
3. Click **Edit Notification** to edit the notification that is sent to the buyer when you respond to the buyer's message. The following popup will be displayed:



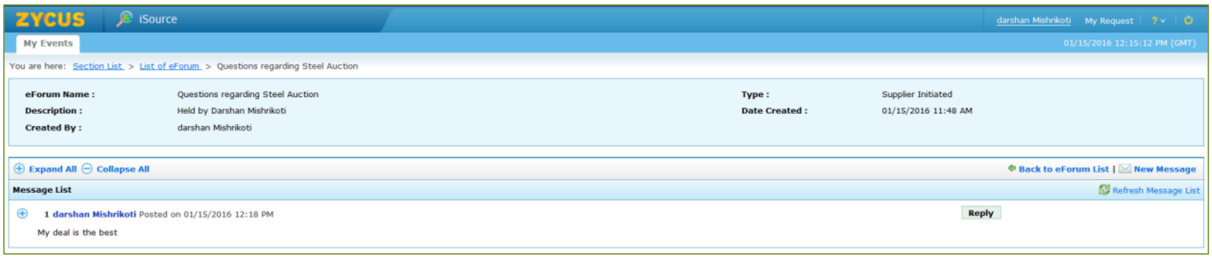

4. Select an **eForum** and click on **New Message**.



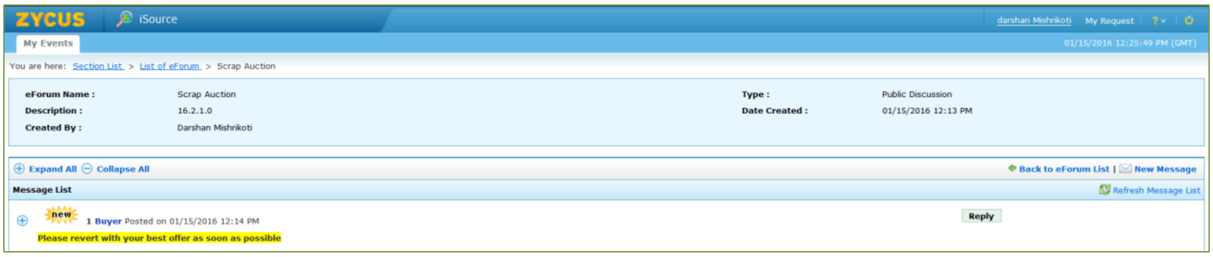

5. Following popup will be displayed. Write your message and click **Post**. Your message will be posted on eForum.



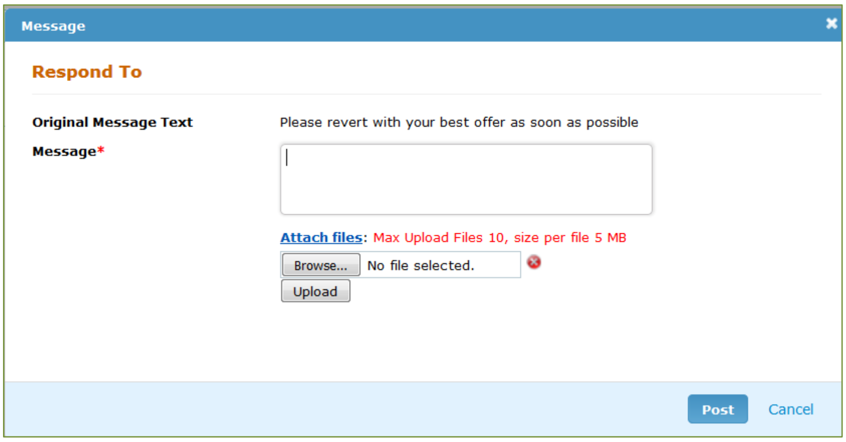

6. You will be able to see your message on the **eForum**.



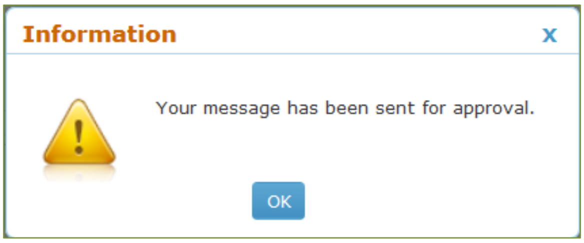

7. Click **Reply**.



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



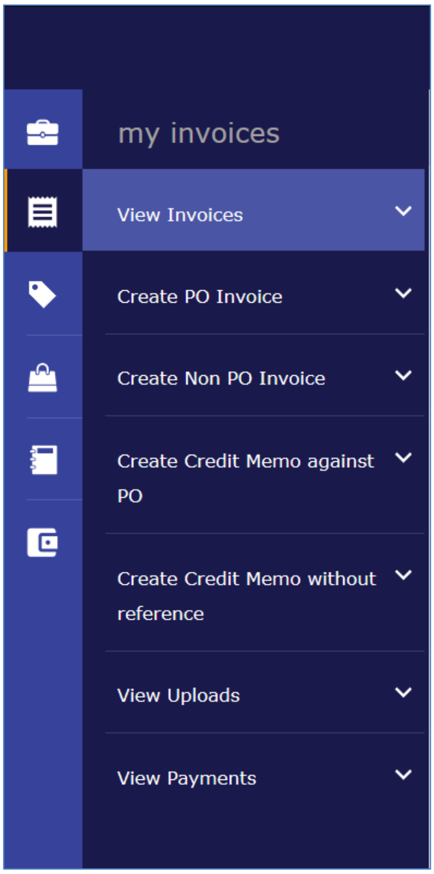

9. Type your message and click **Post**. The following popup will be displayed:



## 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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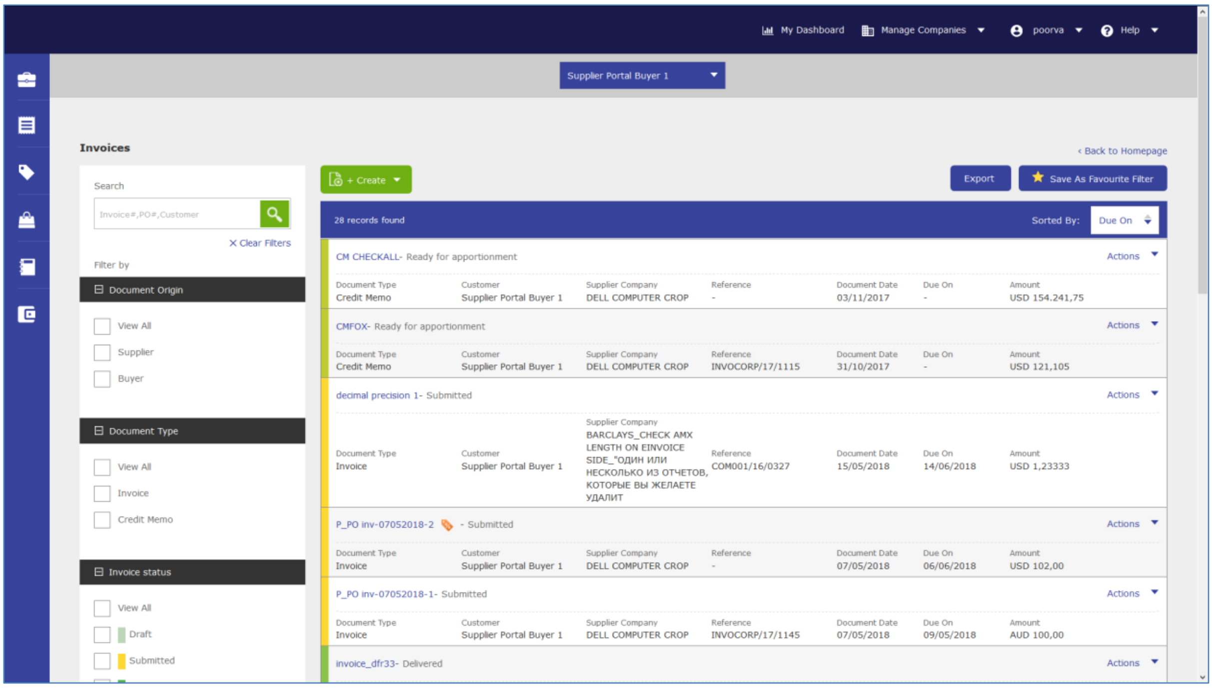
## 6.7.1 How to View Invoices?

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

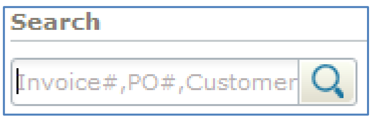



The User can perform the following operations using the **View Invoices** sub tab:

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.

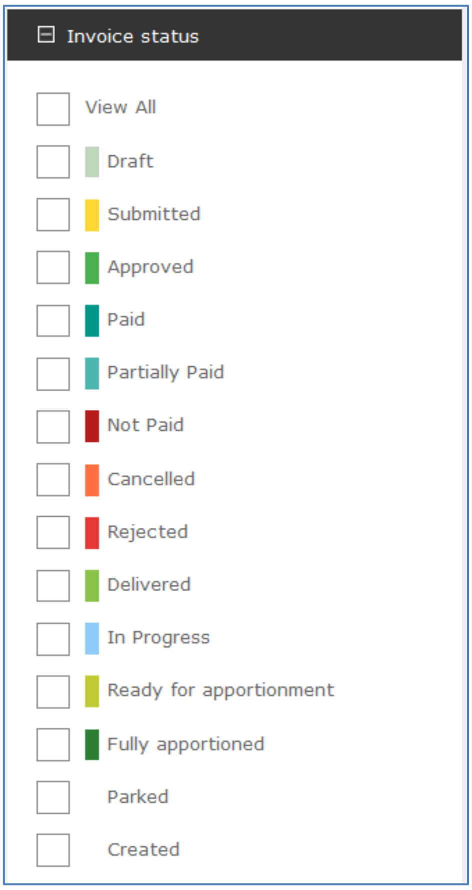



Enter the required search term in the Search Bar and click  or press ENTER.

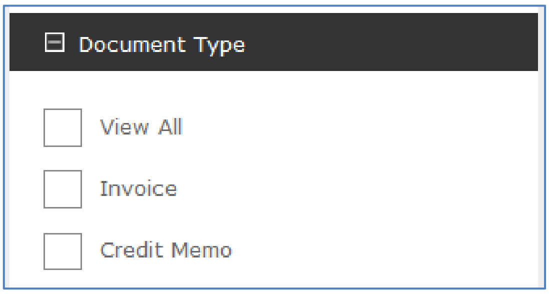
#### 6.7.1.2 *Filtering Invoices*

You can filter the invoices based on the following parameters:

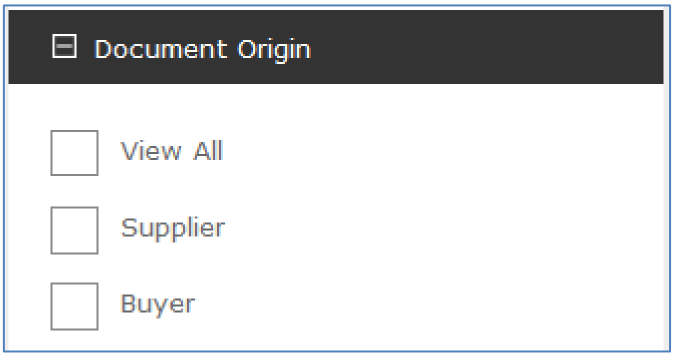
- **Invoice status:** Select a status to view the invoices under that particular status.



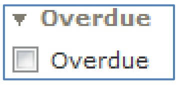

- **Document Type:** Select whether you want to view **Invoice**, **Credit Memo**, or both.



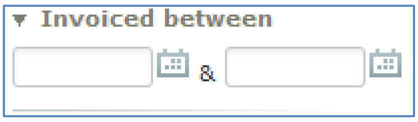
- **Document Origin:** Select if you want to view the invoice or credit memo created by you or your buyer, or both.




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

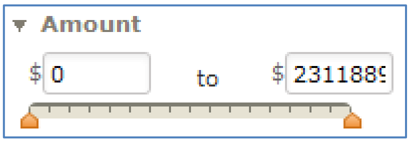



- **Invoiced between:** Select start and end date using the icon to view invoices dated between the selected date ranges.




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


- **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.

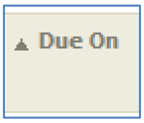



Click **Filter** after selecting/enabling the required filters to filter the invoices.

> *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.



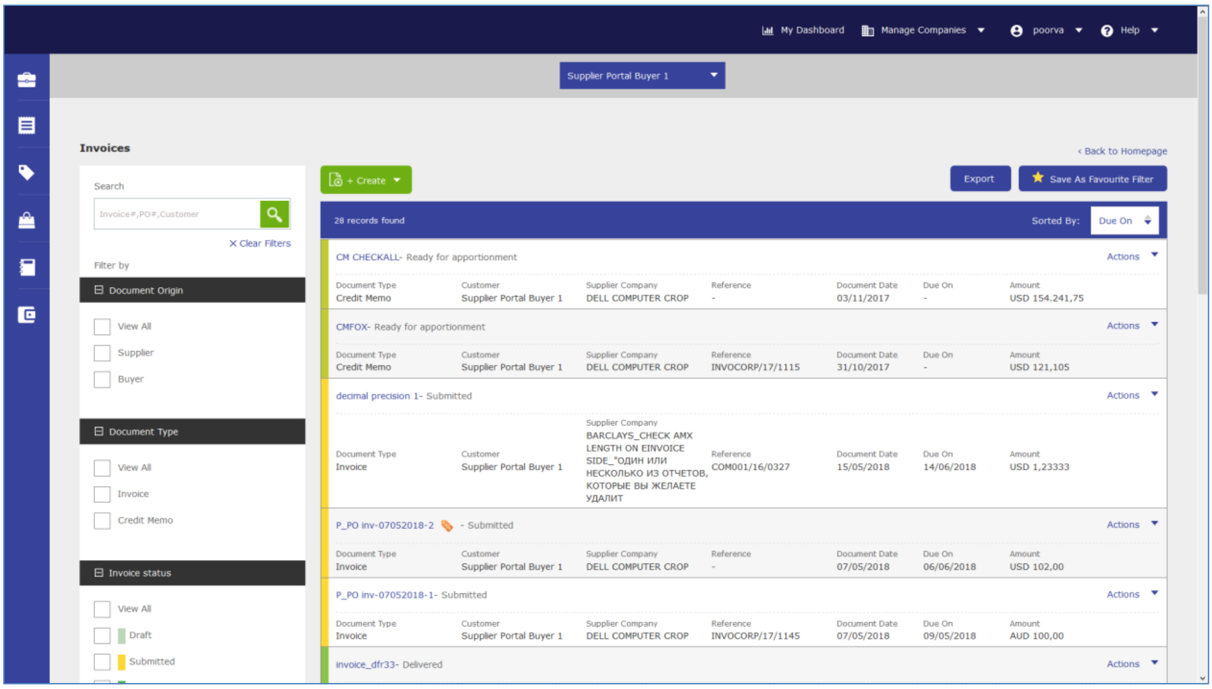

### *6.7.1.4 Viewing Invoices*

**To view a required Invoice:**

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

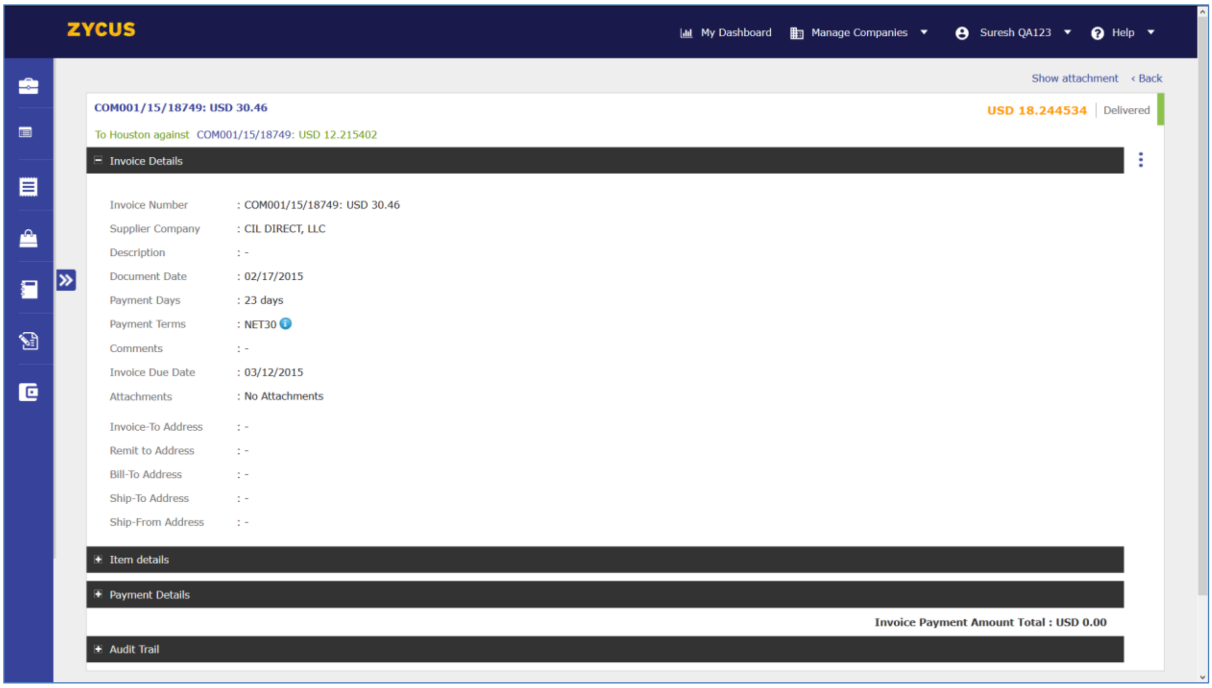
2. Look for the required invoice using the **Search**, **Filter** or **Sort** options.

3. For the required Invoice, click on the corresponding **Invoice Number.**

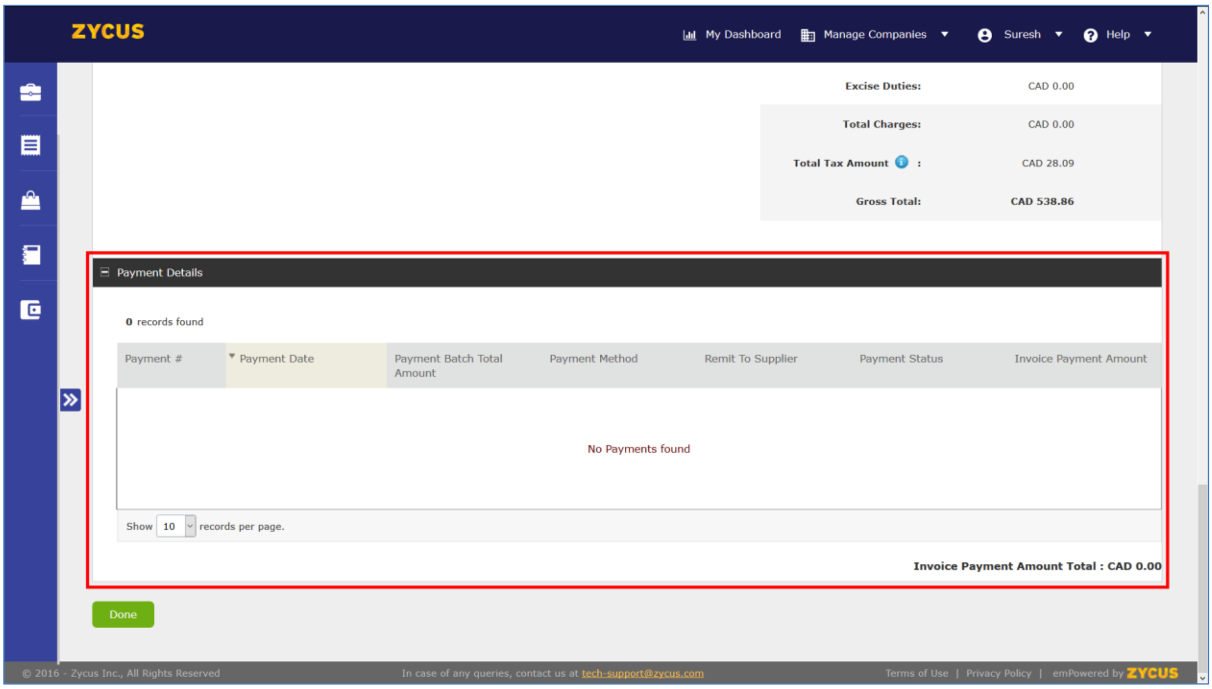



4. For Invoices that are editable, the **Update Invoices** page is displayed. Invoices that cannot be edited are only viewed.

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



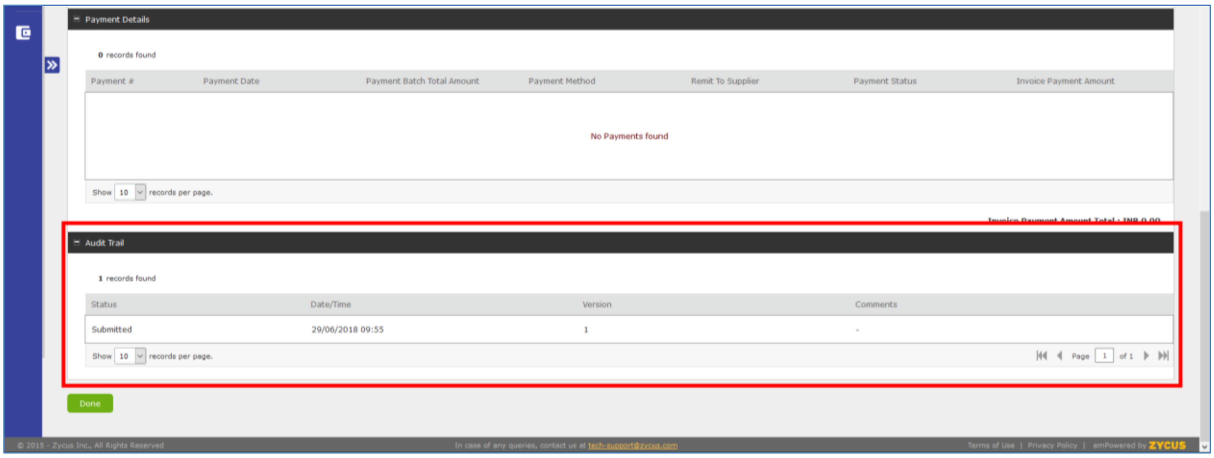

**Note:** On the **Invoice** details page, you will be able to view the payment details if any payment was made against an invoice.



## 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



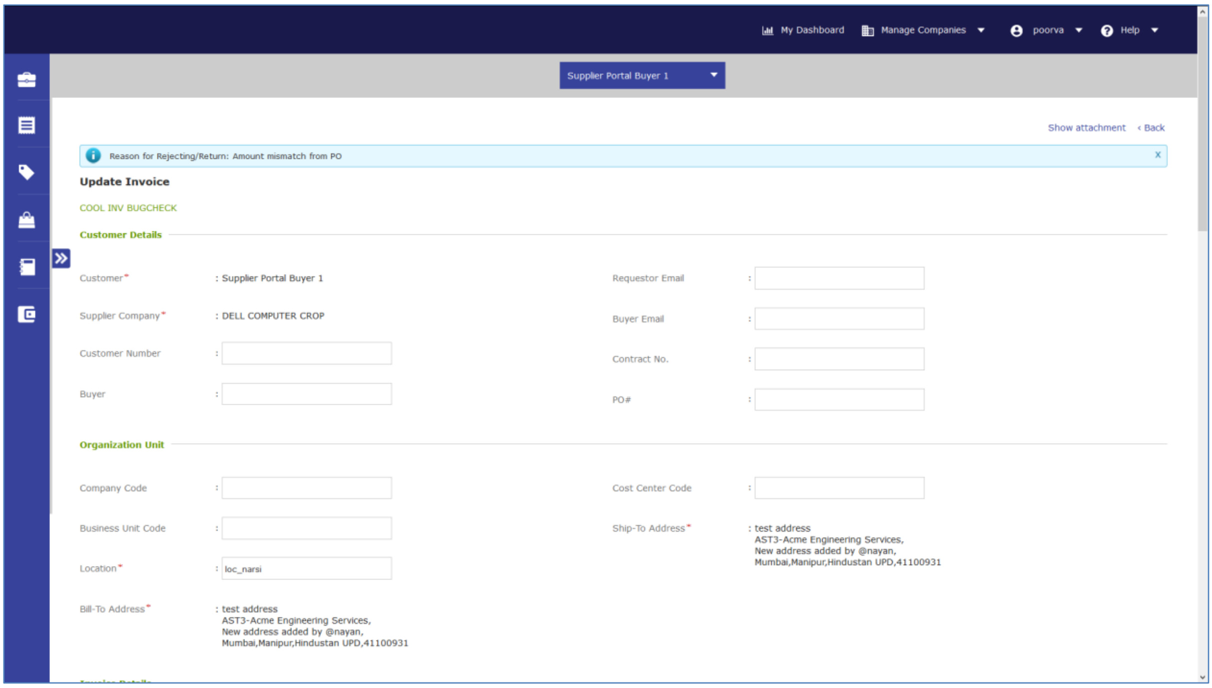
#### 6.7.1.5 *Editing Invoices*

**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.




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.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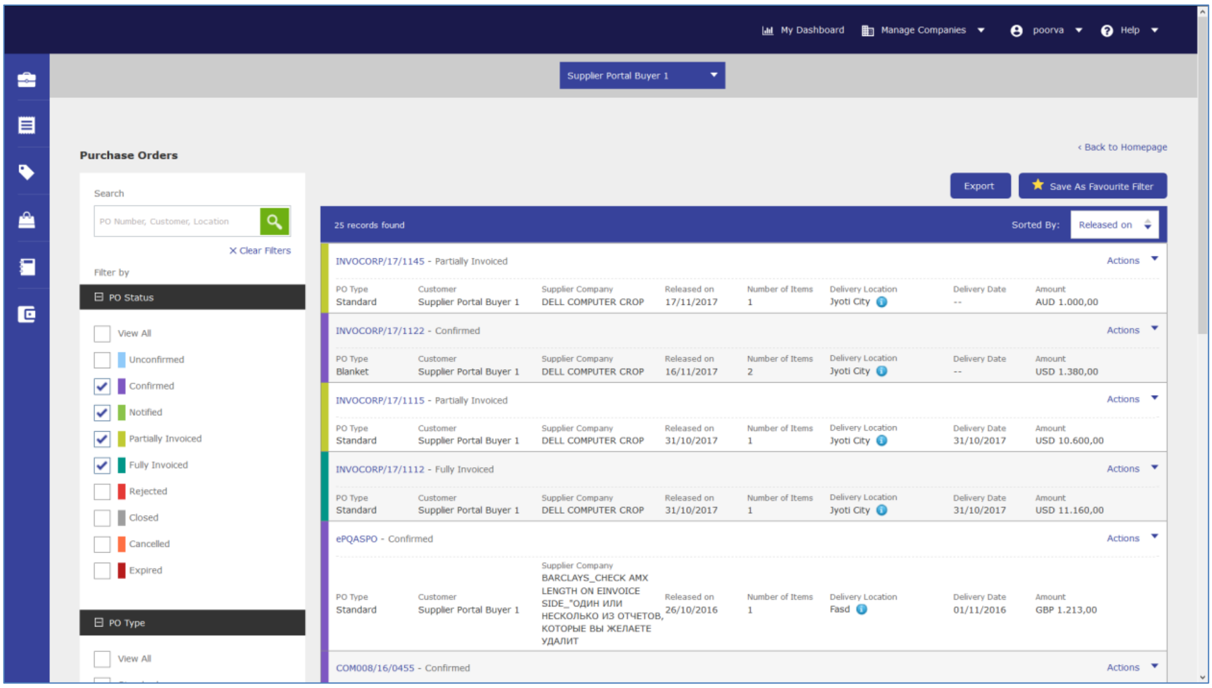
### *6.7.1.6 Creating Invoice*

**<u>To create an Invoice for a Purchase Order:</u>**

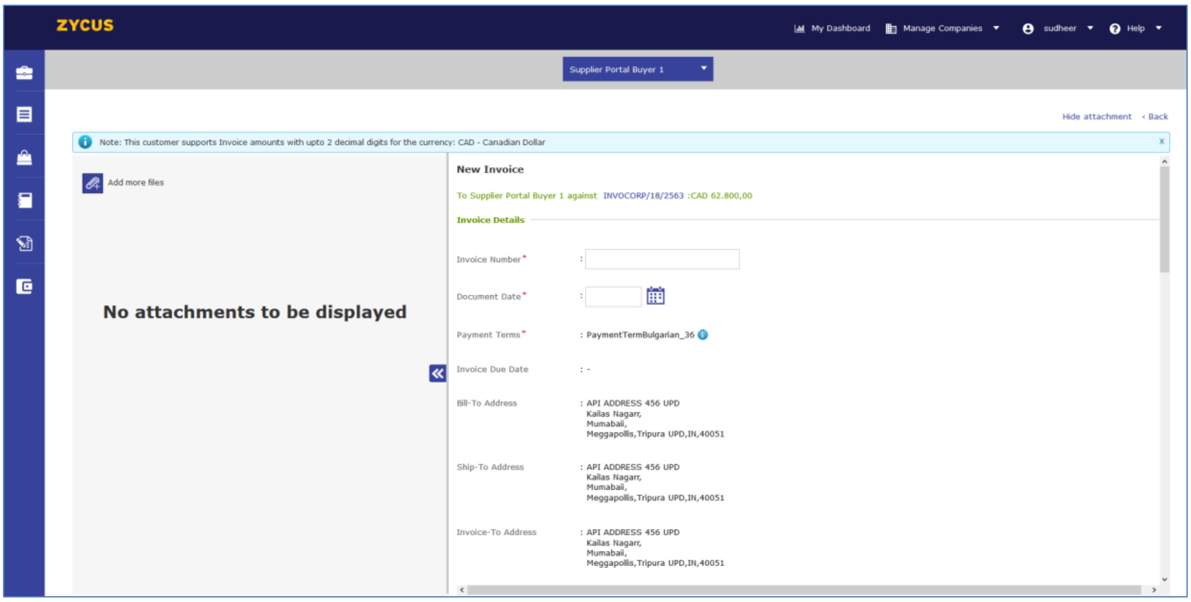
1. Navigate to the following location: Side Panel > **My Invoices** > **Create PO Invoice** > Required Customer Company.




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

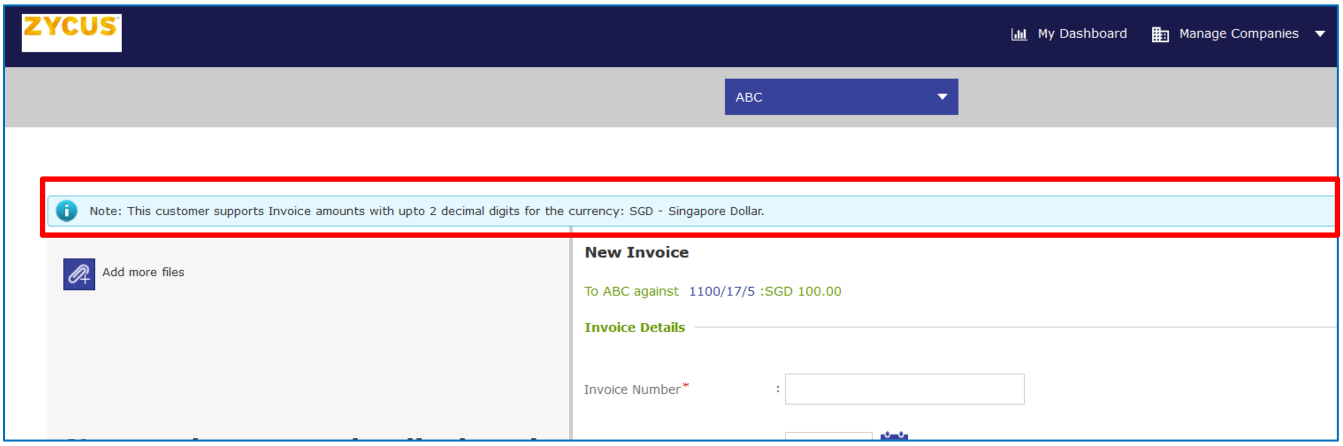
3. Click on the + Invoice icon from actions menu corresponding to the required **Purchase Order.**

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



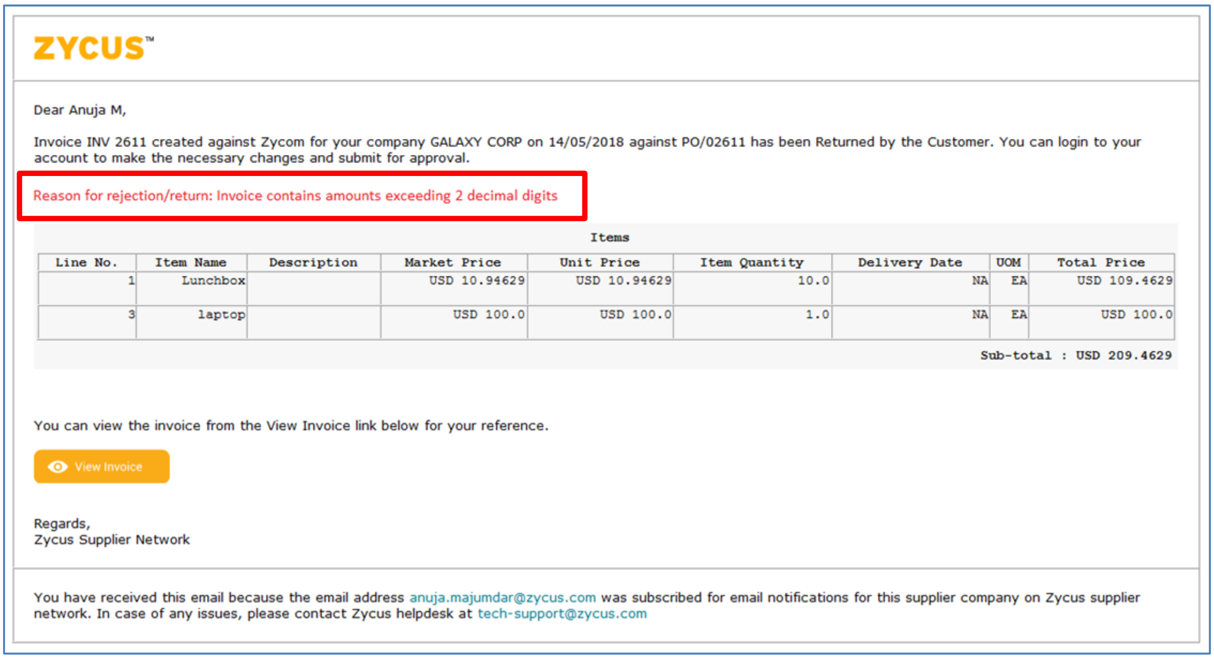

***NOTE:*** You can edit/add item name while creating direct invoices against blanket purchase order if the item name wasn't mentioned by the buyer. The item name which you newly added will be sent to the buyer for approval in the invoice.

***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 |

Sub-total : USD 209.4629

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

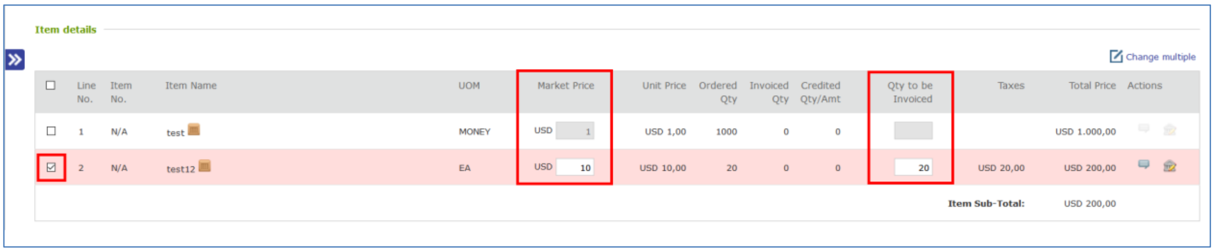
View Invoice

Regards,
Zycus Supplier Network

You have received this email because the email address anuja.majumdar@zycus.com 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

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.

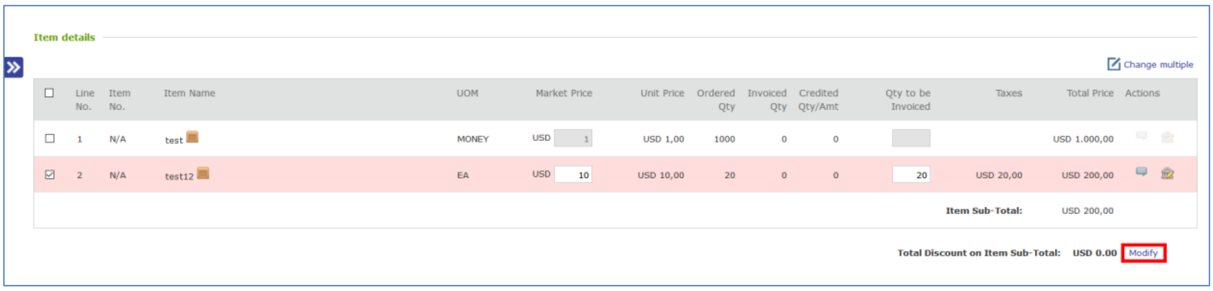
*Select the* **Taxes Inclusive or Not applicable on this item?** option if tax is not applicable for the item **OR** *if the item cost is inclusive of all taxes.*

*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.

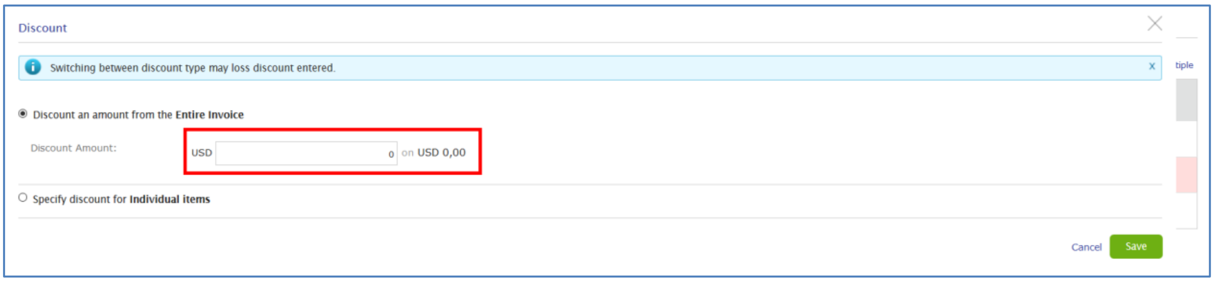



10. The discount for an invoice can be entered in two aspects:

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.



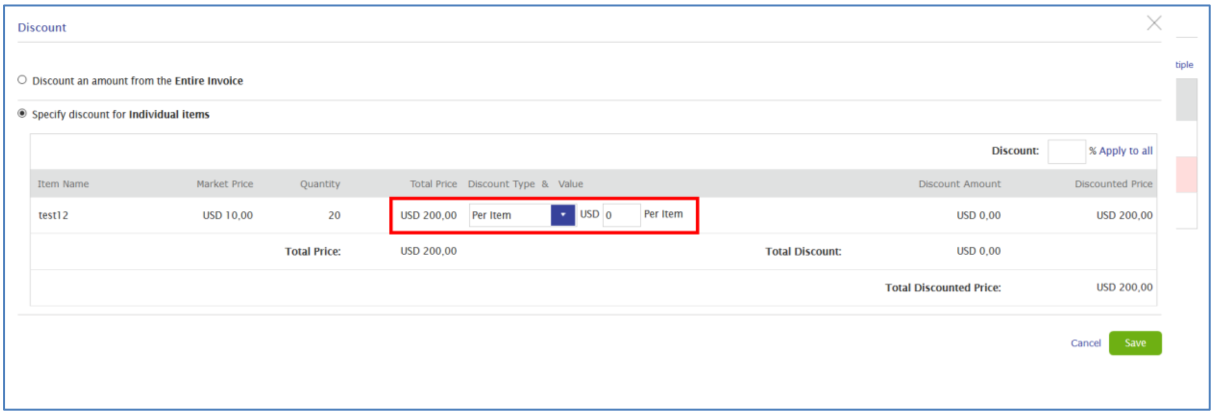

3. Click **Save** to set the entered discount for the Invoice.

B. **Individual Items**:

1. Select the **Specify discount for Individual items** option

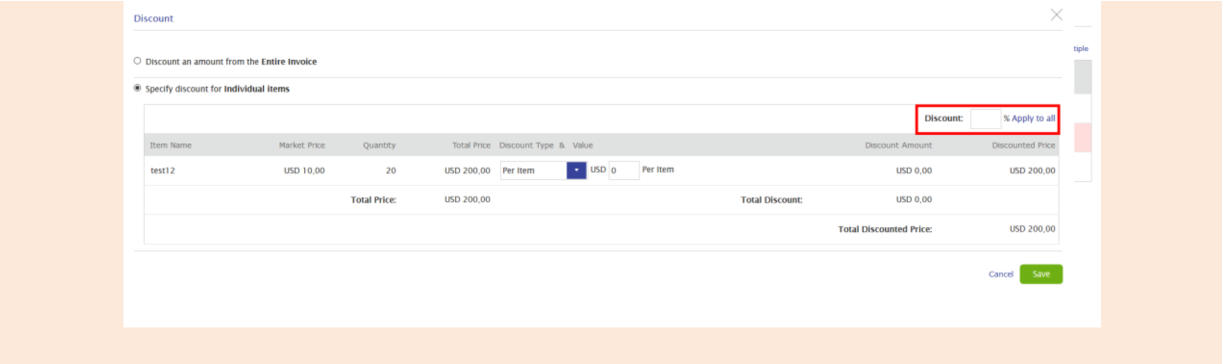
2. Select the Discount Type for the required item

3. Enter the required discount value for the item



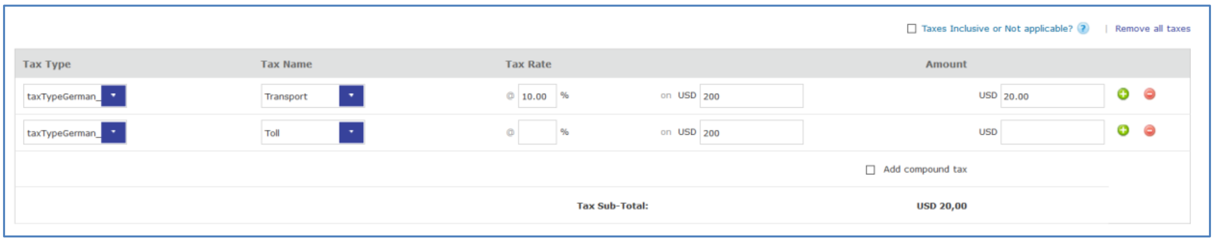

4. Click **Save** to set the entered individual item discounts in the Invoice.

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

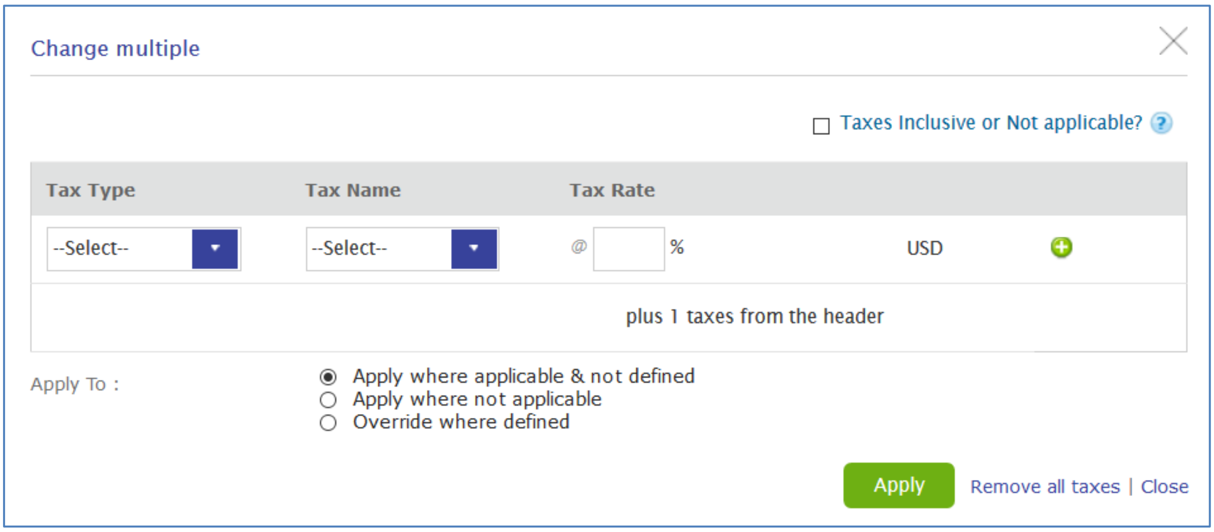



Check the **Taxes Inclusive or Not applicable?** option if taxes are inclusive or not applicable for the invoice.

10. Enter the required tax information for the invoice.



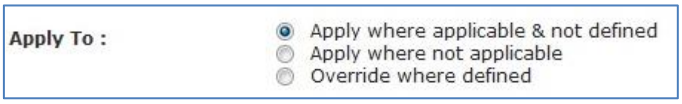

11. To enter common tax information for all individual items, select the required items and click **Change multiple.**




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.




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.

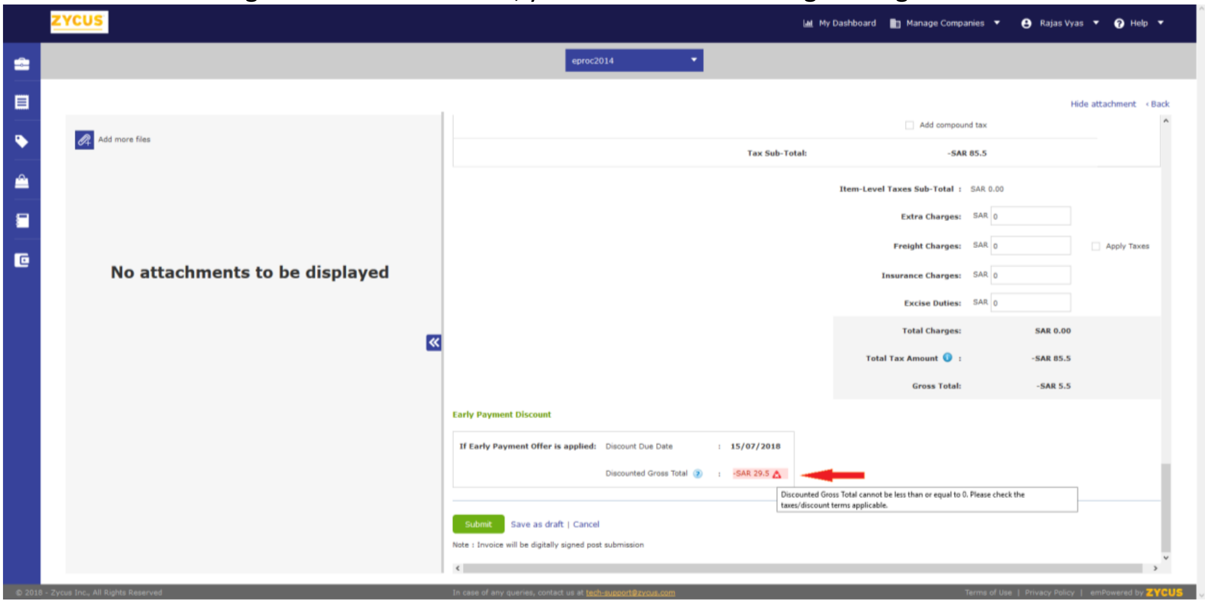
*Invoice can also be created using the* ***Create Invoice*** *option under the* ***Actions*** *menu on the* ***View PO*** *page for the respective Purchase Order.*

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**

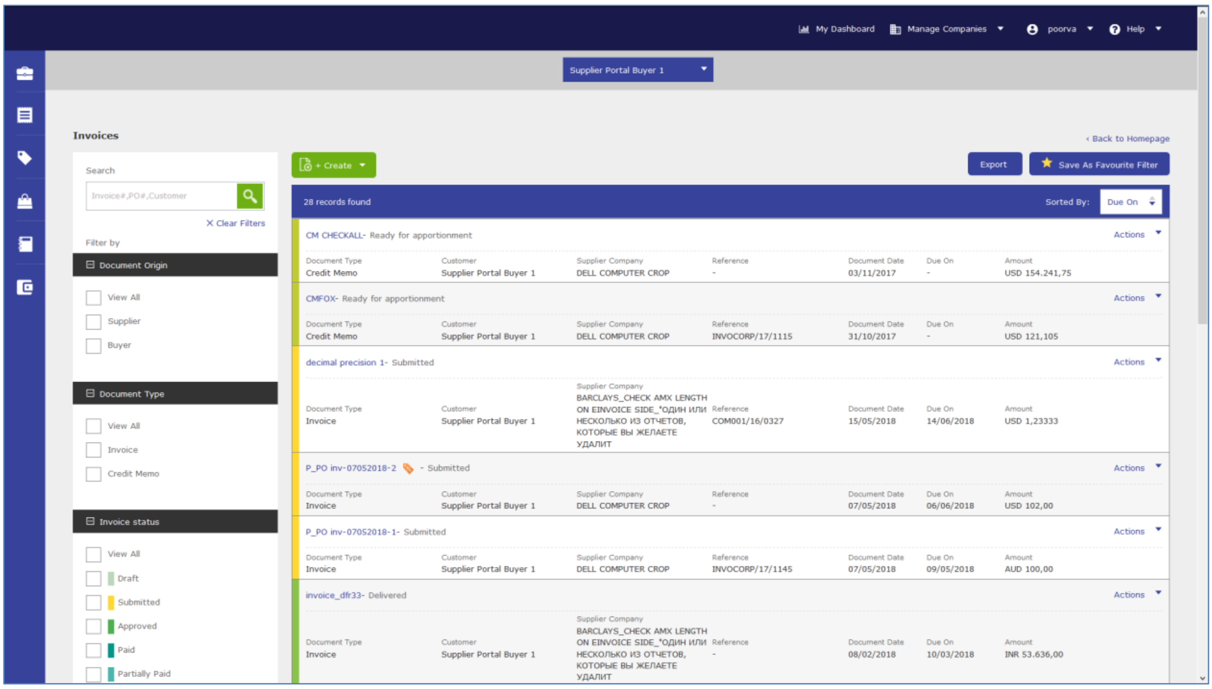
21. If the discounted gross total is less than 0, you will see the following message on the screen:



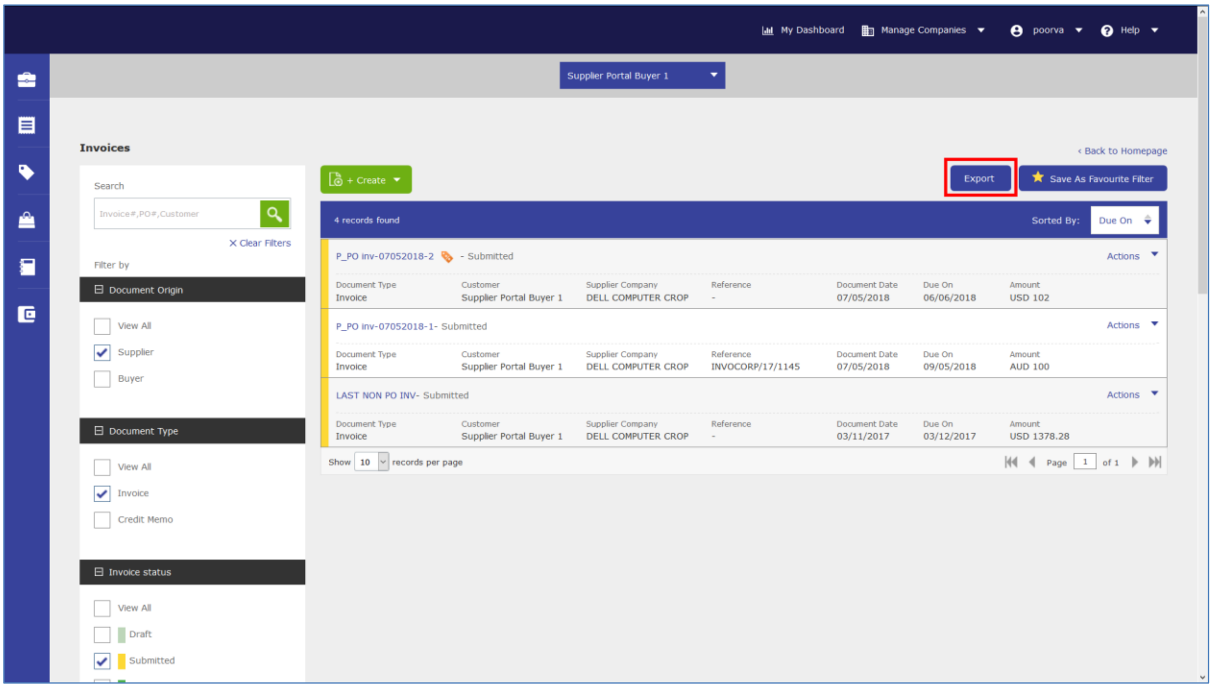
### 6.7.1.7 *Exporting Invoice Details*

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:

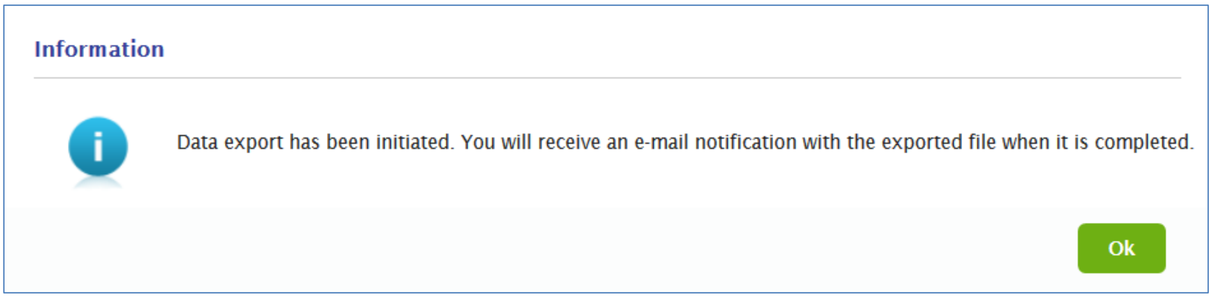
1. Navigate to Invoice listing page from **Side Panel** > **My Invoices** > **View Invoices** > *Customer Name*. You will land on the following page:



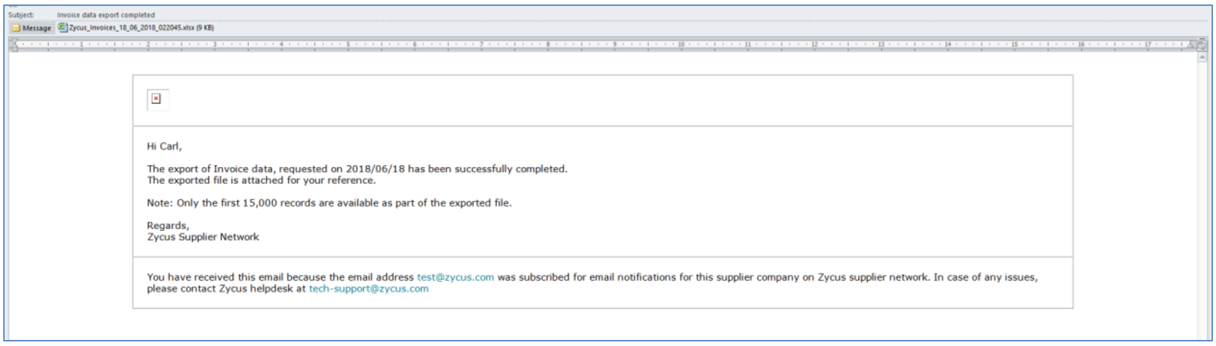
2. To export the invoice details, click **Export** as highlighted in the image below:



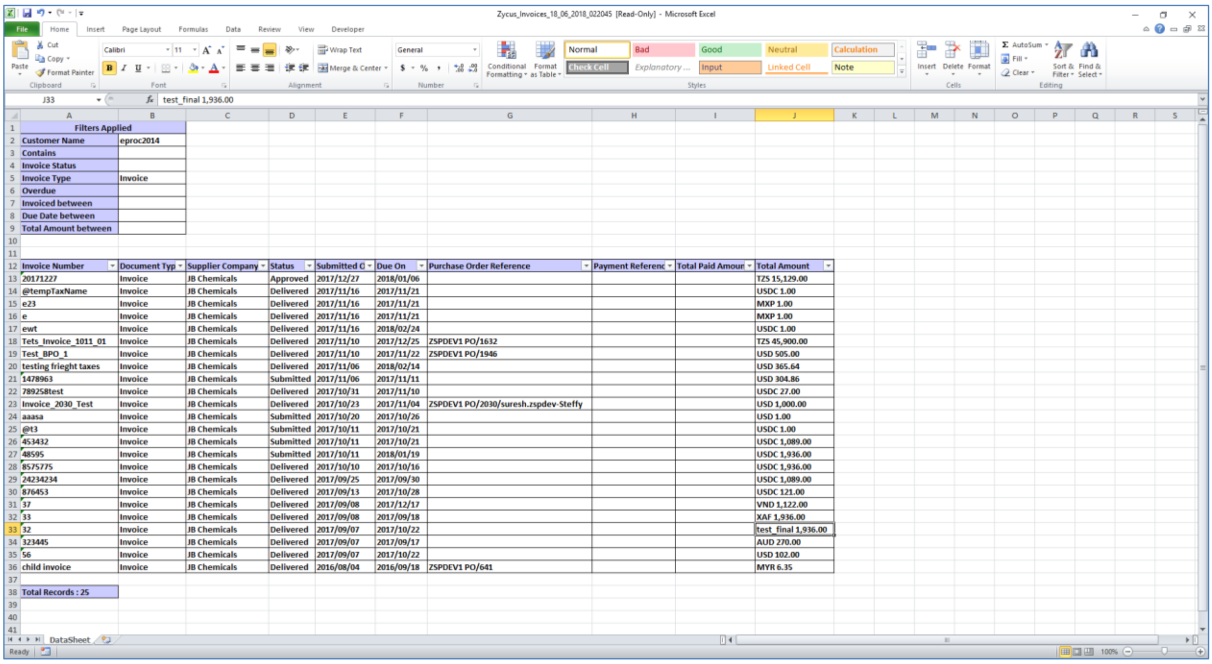
3. Clicking **Export**, you will see the following popup which will notify you that data export is in progress and you will be notified through an email once the file export is complete. Click **Ok**.




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 invoice details:



Zycus_Invoices_18_06_2018_022045 [Read-Only] - Microsoft Excel

| Filters Applied | |
|---|---|
| Customer Name | eproc2014 |
| Contains | |
| Invoice Status | |
| Invoice Type | Invoice |
| Overdue | |
| Invoiced between | |
| Due Date between | |
| Total Amount between | |

| Invoice Number | Document Typ | Supplier Company | Status | Submitted O | Due On | Purchase Order Reference | Payment Referenc | Total Paid Amour | 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 | | | | USDC 1.00 |
| e23 | Invoice | JB Chemicals | Delivered | 2017/11/16 | 2017/11/21 | | | | MXP 1.00 |
| e | Invoice | JB Chemicals | Delivered | 2017/11/16 | 2017/11/21 | | | | MXP 1.00 |
| ewt | Invoice | JB Chemicals | Delivered | 2017/11/16 | 2018/02/24 | | | | USDC 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 frieght taxes | Invoice | JB Chemicals | Delivered | 2017/11/06 | 2018/02/14 | | | | USD 365.64 |
| 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 | | | | USDC 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 |
| @t3 | Invoice | JB Chemicals | Submitted | 2017/10/11 | 2017/10/21 | | | | USDC 1.00 |
| 453432 | Invoice | JB Chemicals | Submitted | 2017/10/11 | 2017/10/21 | | | | USDC 1,089.00 |
| 48595 | Invoice | JB Chemicals | Submitted | 2017/10/11 | 2018/01/19 | | | | USDC 1,936.00 |
| 8575775 | Invoice | JB Chemicals | Delivered | 2017/10/10 | 2017/10/16 | | | | USDC 1,936.00 |
| 24234234 | Invoice | JB Chemicals | Delivered | 2017/09/25 | 2017/09/30 | | | | USDC 1,089.00 |
| 876453 | Invoice | JB Chemicals | Delivered | 2017/09/13 | 2017/10/28 | | | | USDC 121.00 |
| 37 | Invoice | JB Chemicals | Delivered | 2017/09/08 | 2017/12/17 | | | | VND 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 | | | | test_final 1,936.00 |
| 323445 | 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 | 2016/08/04 | 2016/09/18 | ZSPDEV1 PO/641 | | | MYR 6.35 |

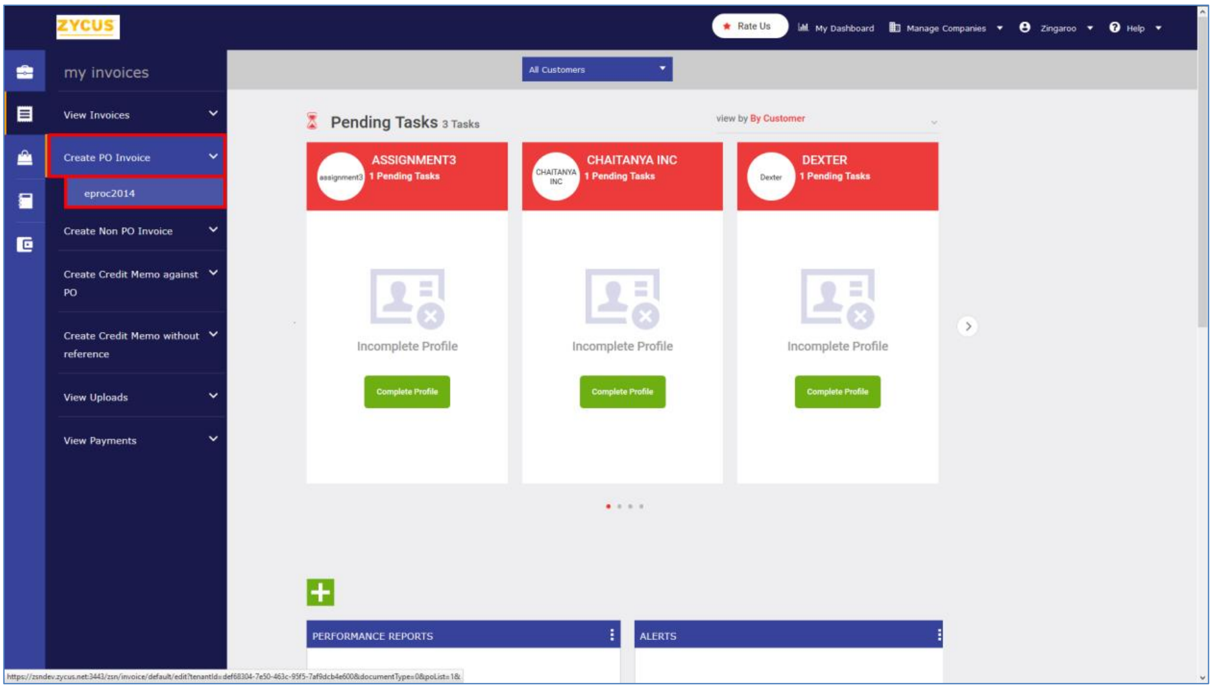
Total Records : 25

DataSheet

**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.

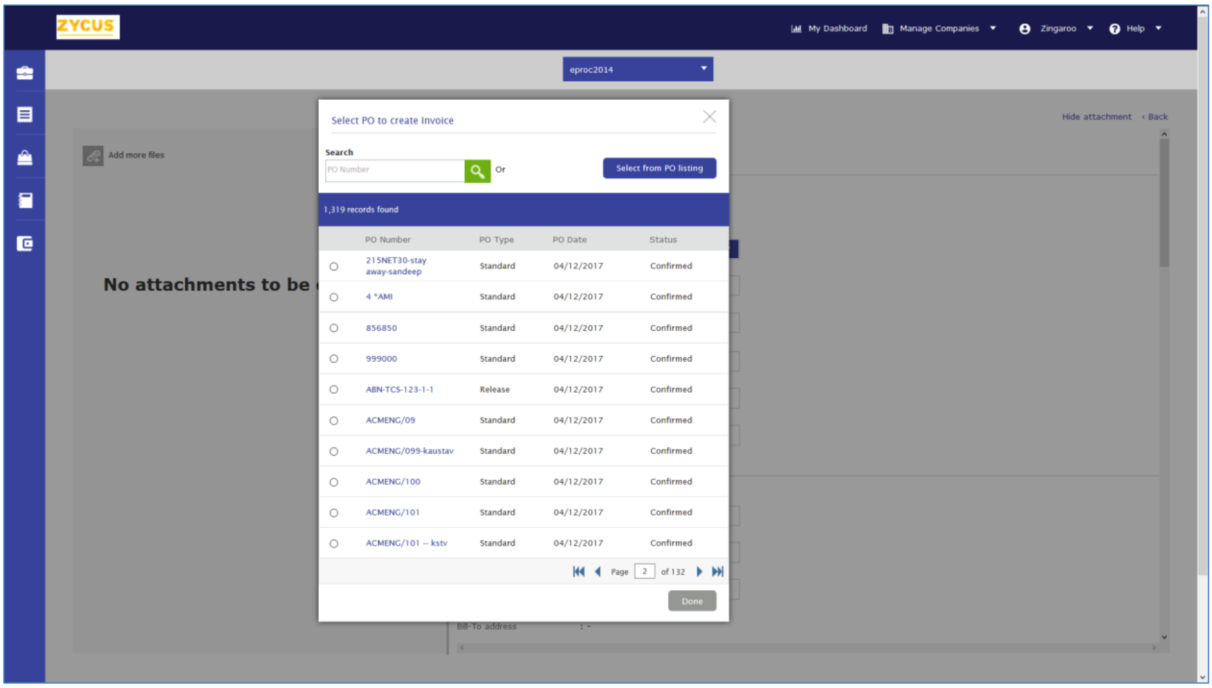
### 6.7.2 How to Create a PO Invoice?

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**.



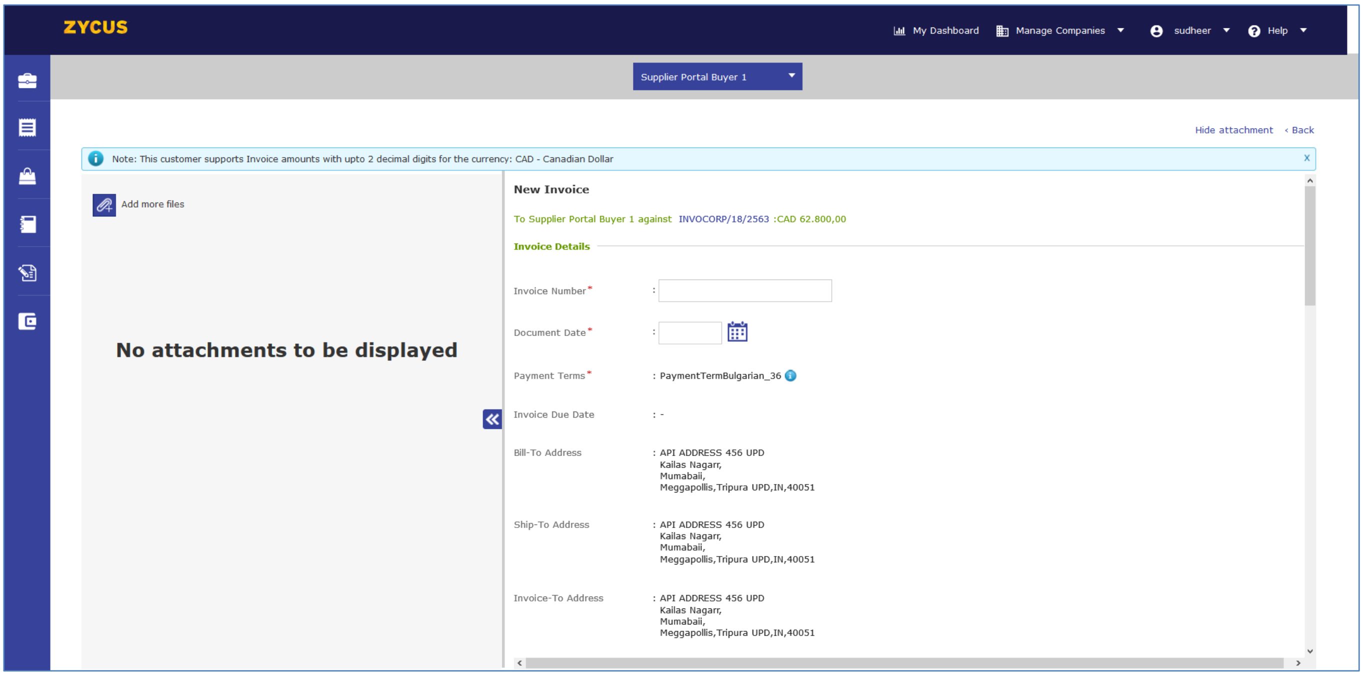

3. You will see the following popup. This popup will have a list of PO's which you can select to create an invoice.

**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

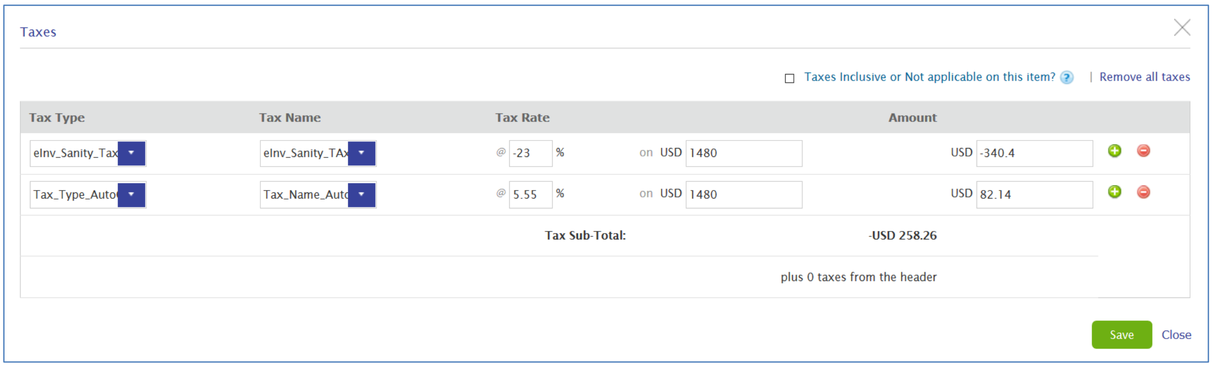
Change multiple

| ☑ | 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | 1 | N/A | Laptop | EA | USD 12,00( | USD 12,000000 | 12 | 0 | 0 | 12,00( | USD 0,000000 | USD 144,000000 | |
| ☑ | 2 | N/A | Server | EA | USD 23,00( | USD 23,000000 | 23 | 0 | 0 | 23,00( | USD 0,000000 | USD 529,000000 | |
| | | | | | | | | | | | Item Sub-Total: | USD 673,000000 | |

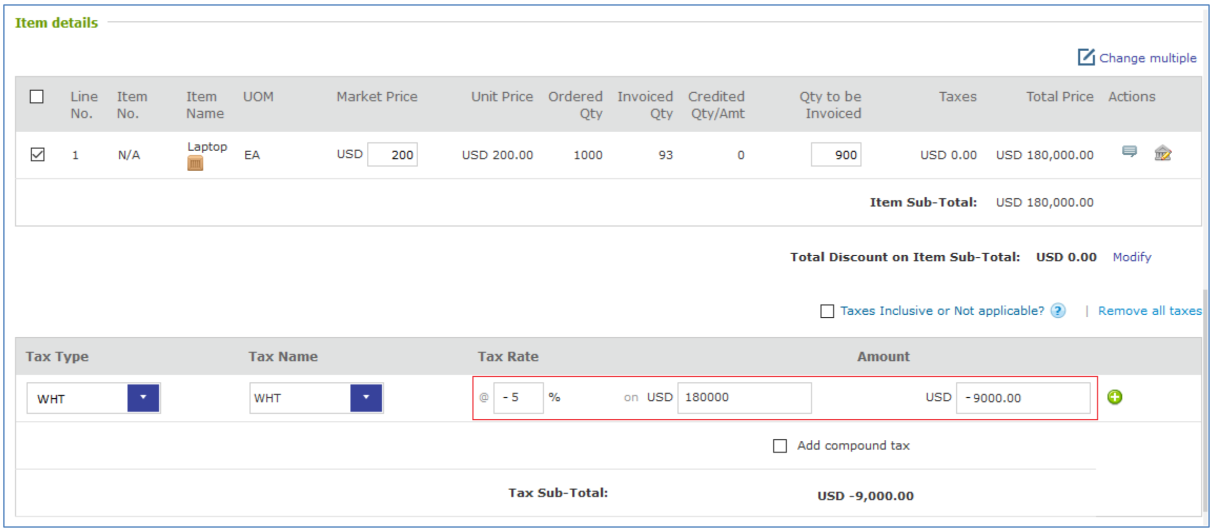
***Note:*** *If a line item has "Receive by: Amount" on the PO;* ***Market Price***, ***Unit Price***, *and* ***UOM*** *fields should have the value N/A.*

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

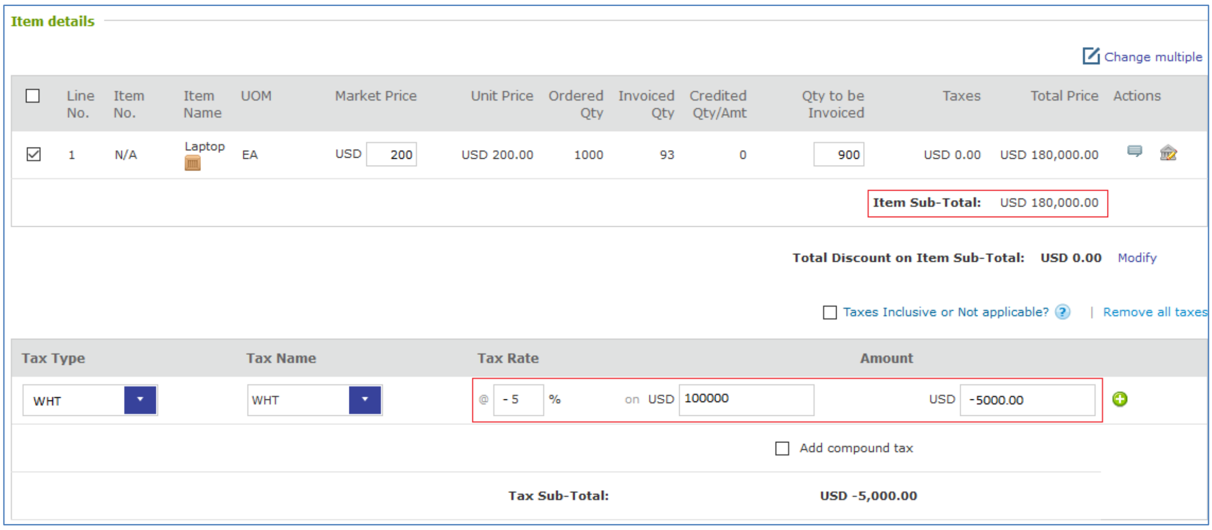
10. You can add taxes to the line items by clicking the icon. You will see the following popup:




11. 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.
12. 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.
13. You can also apply taxes at header level as shown in the image below:




14. Both –ve tax rate and/or –ve tax amount can be entered. –ve tax rate/amount indicates witholding taxes.
15. When –ve taxes are added, the discounted item total, on which the tax is applicable, can be edited.



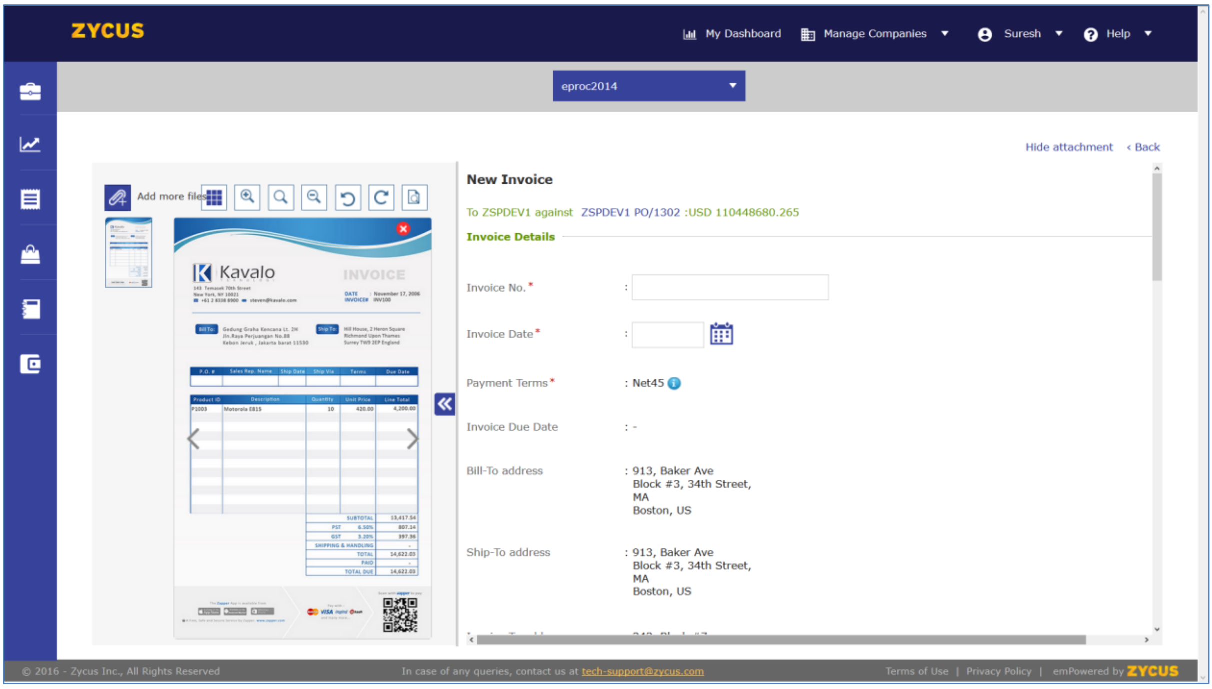

**Note: You can type a tax name which is not present in the drop-down list.**

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

### *6.7.2.2 Side by Side Panel*

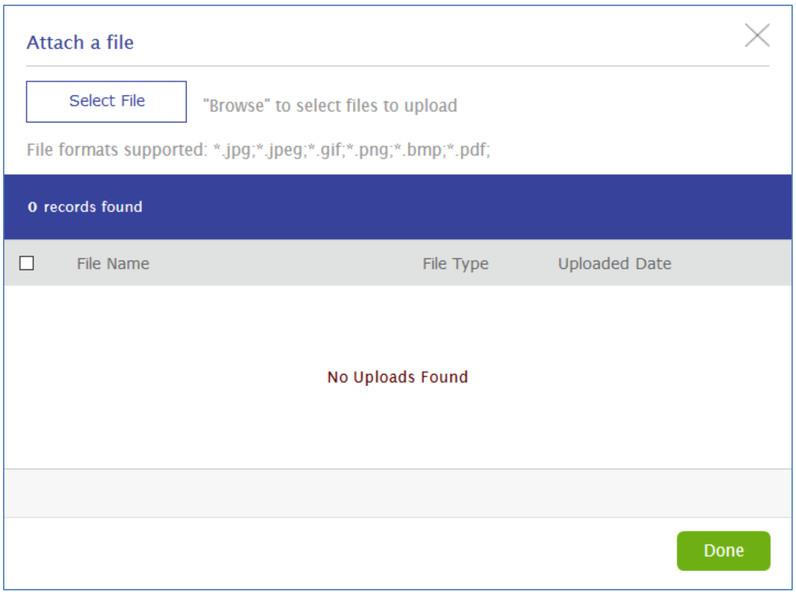
*Side by Side panel is a different view of PO invoice creation page.*

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."*



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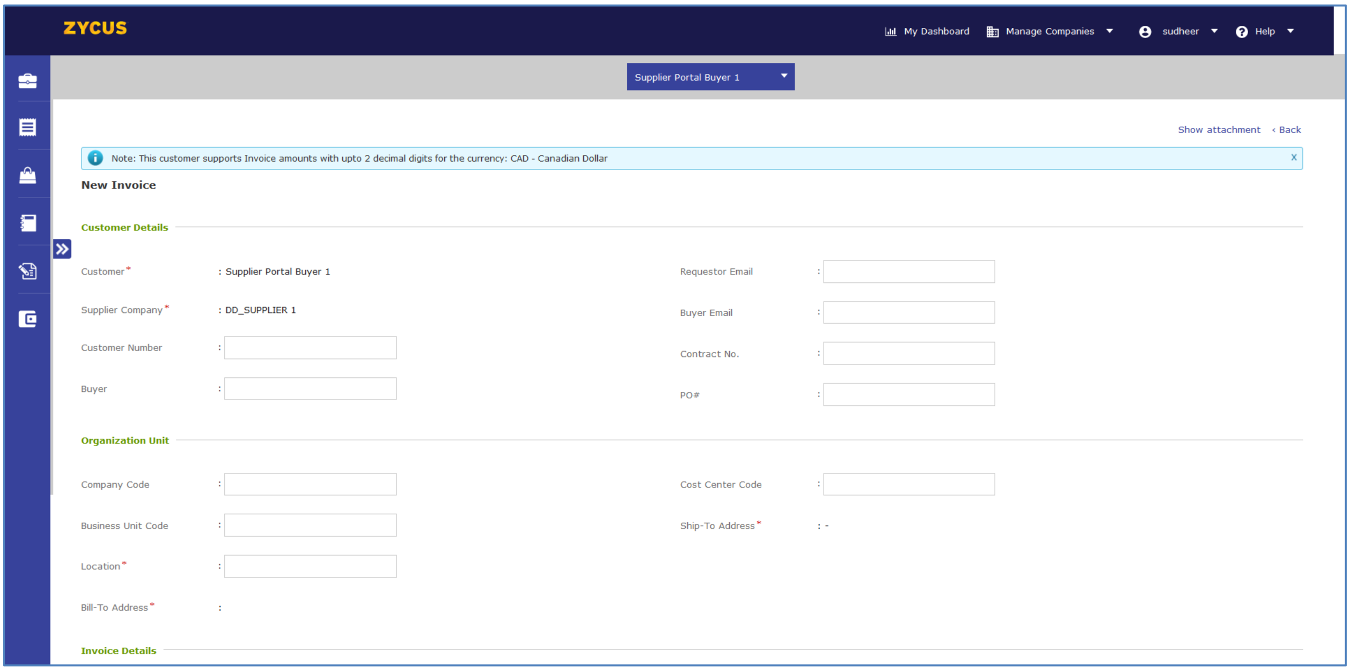
### 6.7.3 How to Create a Non PO Invoice?

*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.




***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**.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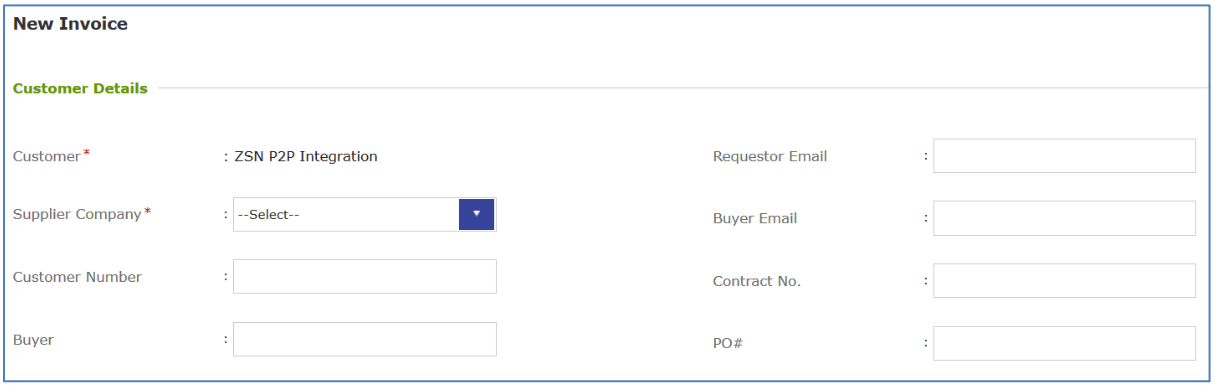
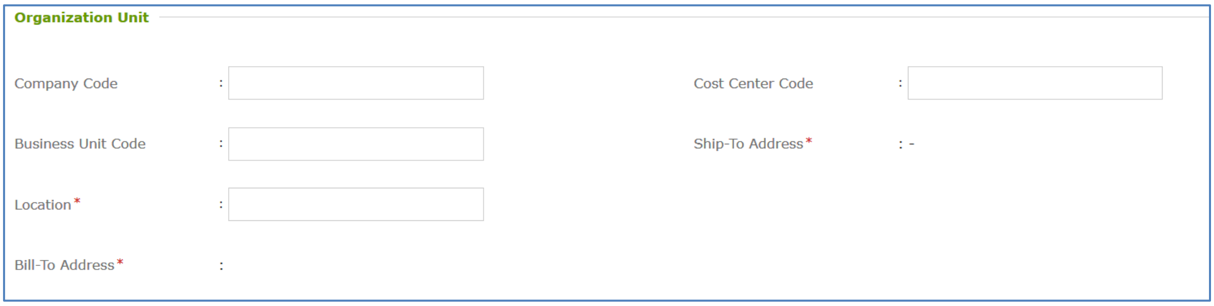

**New Invoice**

**Customer Details**

| | | | |
|---|---|---|---|
| Customer* | : ZSN P2P Integration | Requestor Email | : |
| Supplier Company* | : --Select-- | Buyer Email | : |
| Customer Number | : | Contract No. | : |
| Buyer | : | PO# | : |

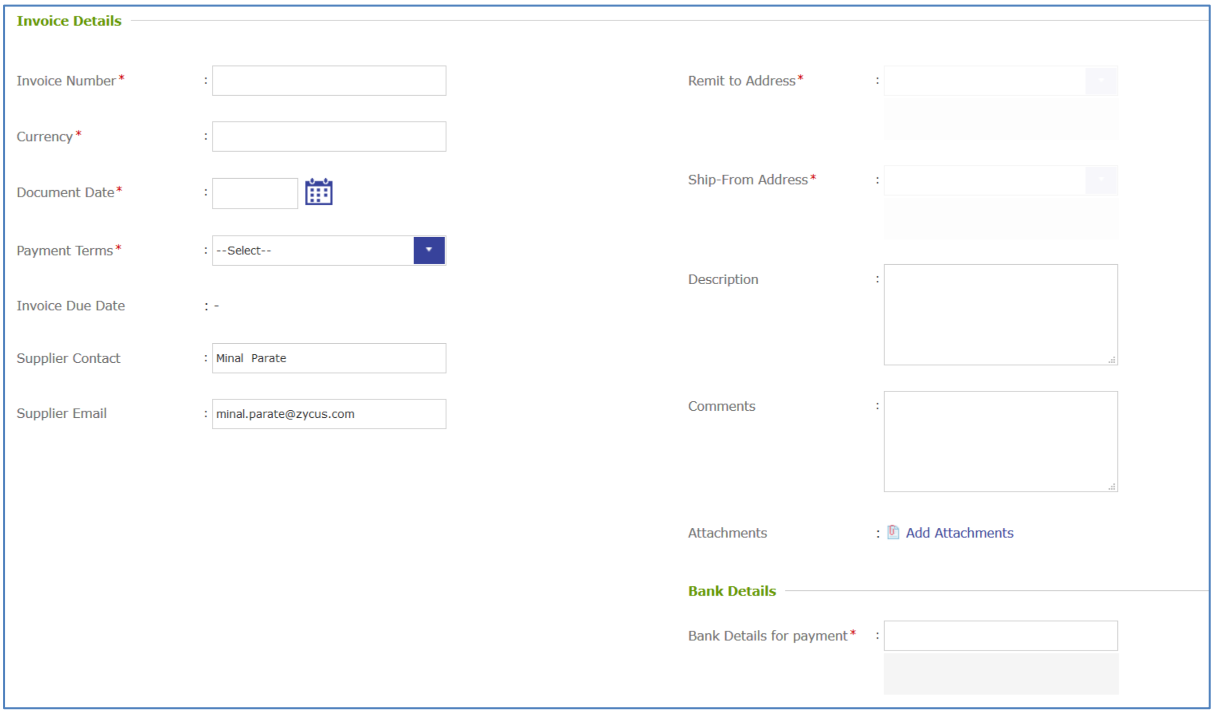
**Note:** As a supplier, you have the flexibility of adding the **Buyer** and **Requester Email ID**.

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


**Organization Unit**

| | | | |
|---|---|---|---|
| Company Code | : | Cost Center Code | : |
| Business Unit Code | : | Ship-To Address* | : - |
| Location* | : | | |
| Bill-To Address* | : | | |

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


**Invoice Details**

| | | | |
|---|---|---|---|
| Invoice Number* | : | Remit to Address* | : |
| Currency* | : | | |
| Document Date* | : | Ship-From Address* | : |
| Payment Terms* | : --Select-- | | |
| Invoice Due Date | : - | Description | : |
| Supplier Contact | : Minal Parate | Comments | : |
| Supplier Email | : minal.parate@zycus.com | Attachments | : Add Attachments |

**Bank Details**

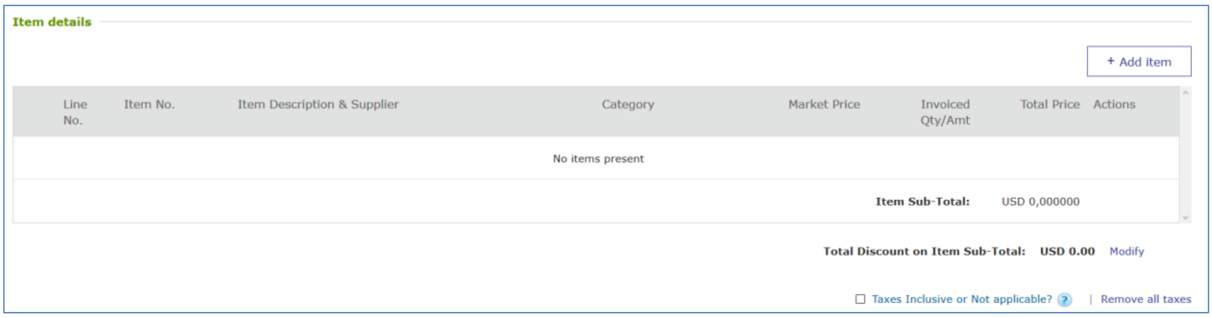
Bank Details for payment* :

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

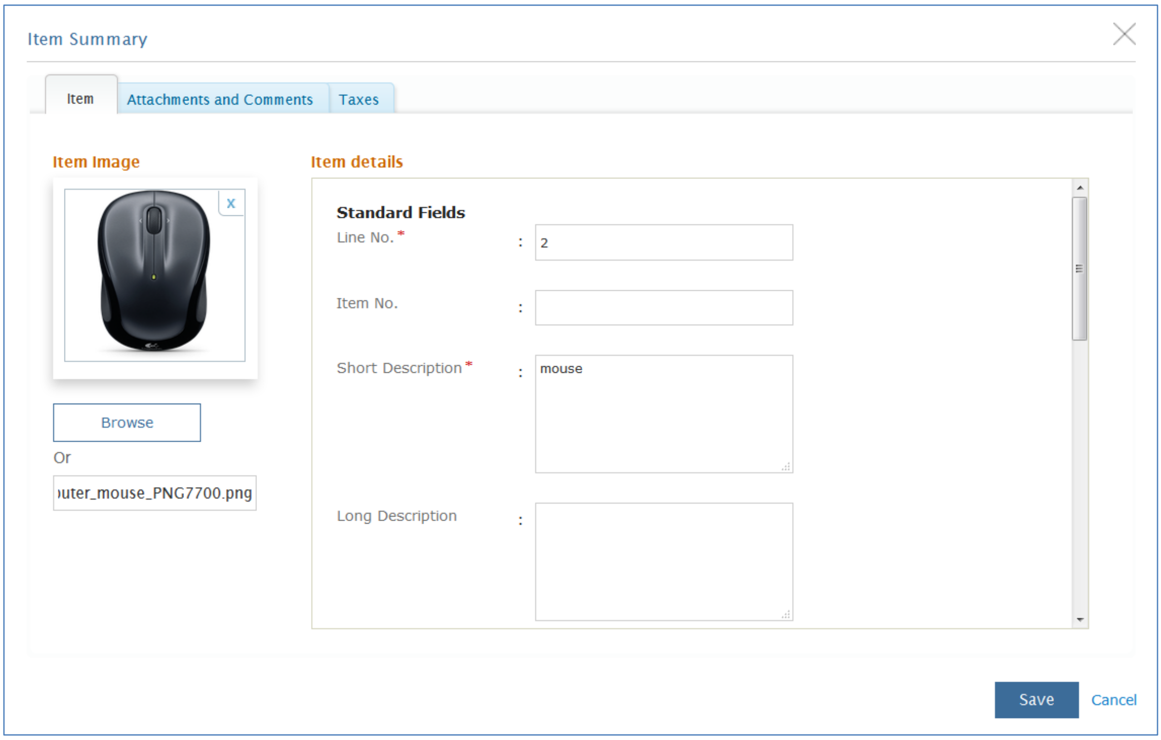
4. Add the required attachments for the Non PO Invoice.

***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



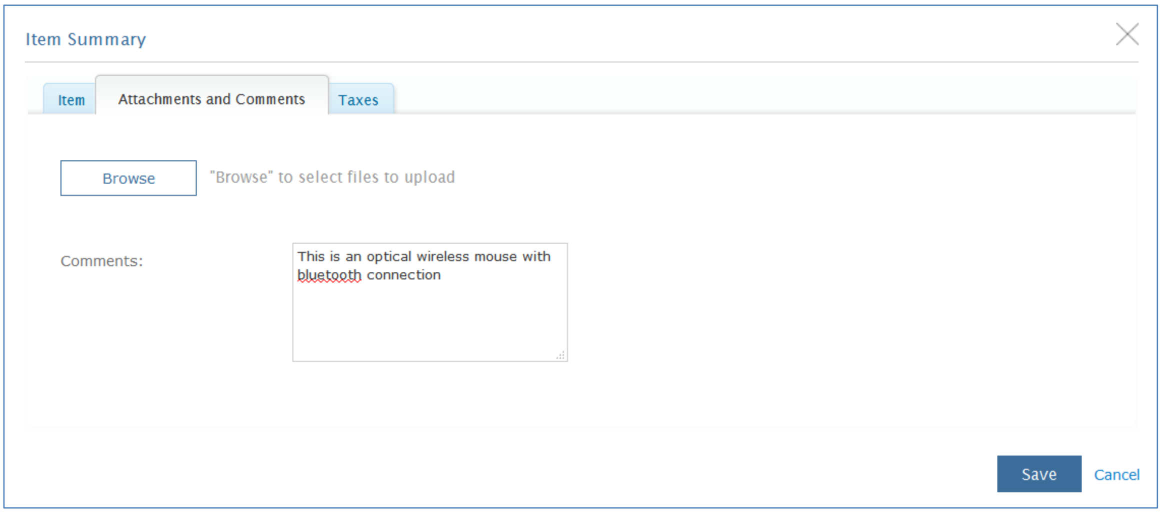

*Note: If the* ***"Invoice by"*** *option is set to* ***Amount****, then:*

*Market Price, Unit Price and UOM fields will be disabled, with value as N/A.*

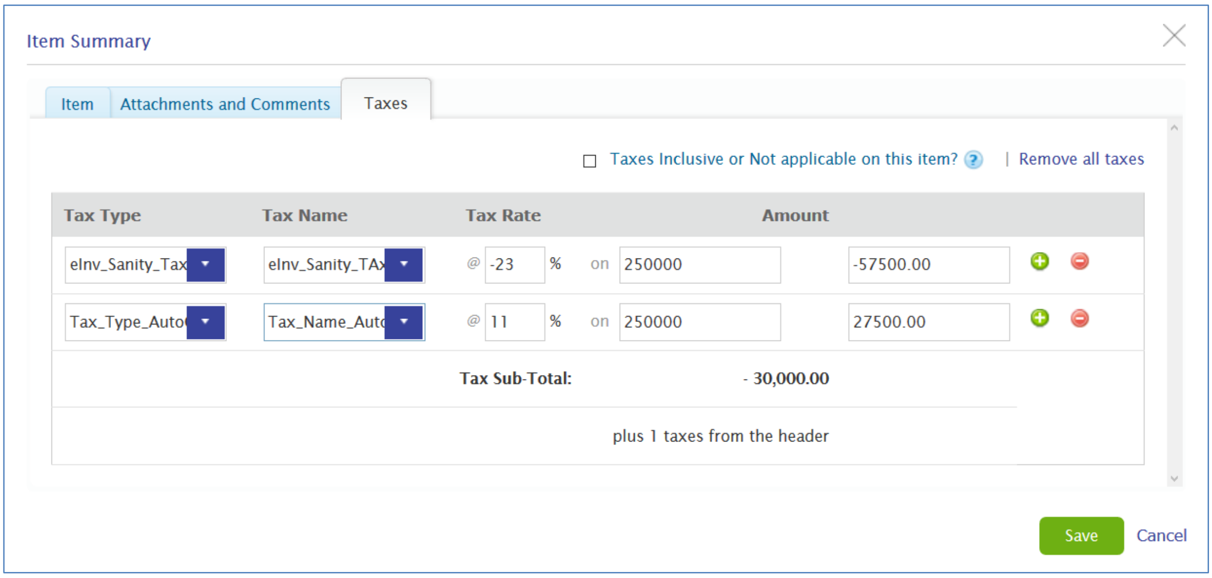
*A new mandatory field, **"Amount"**, will become visible.*

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

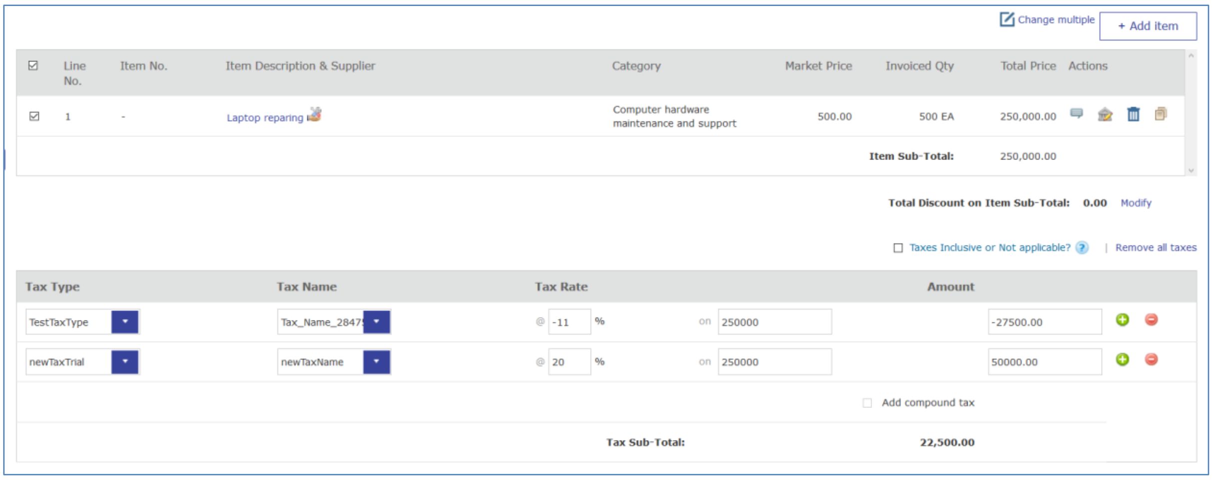
7. Attach the required files and mention the required comments under the **Attachments & Comments** tab.



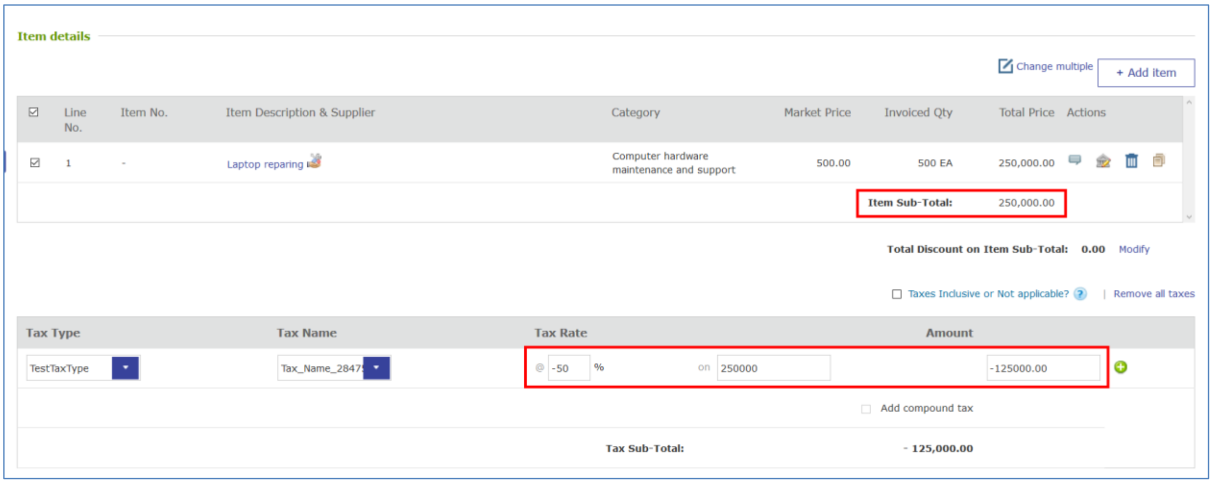

8. Add and enter all the required tax information for the item being added to the Non PO Invoice.




9. 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.
10. You can also apply taxes at header level as shown in the image below:



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.



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

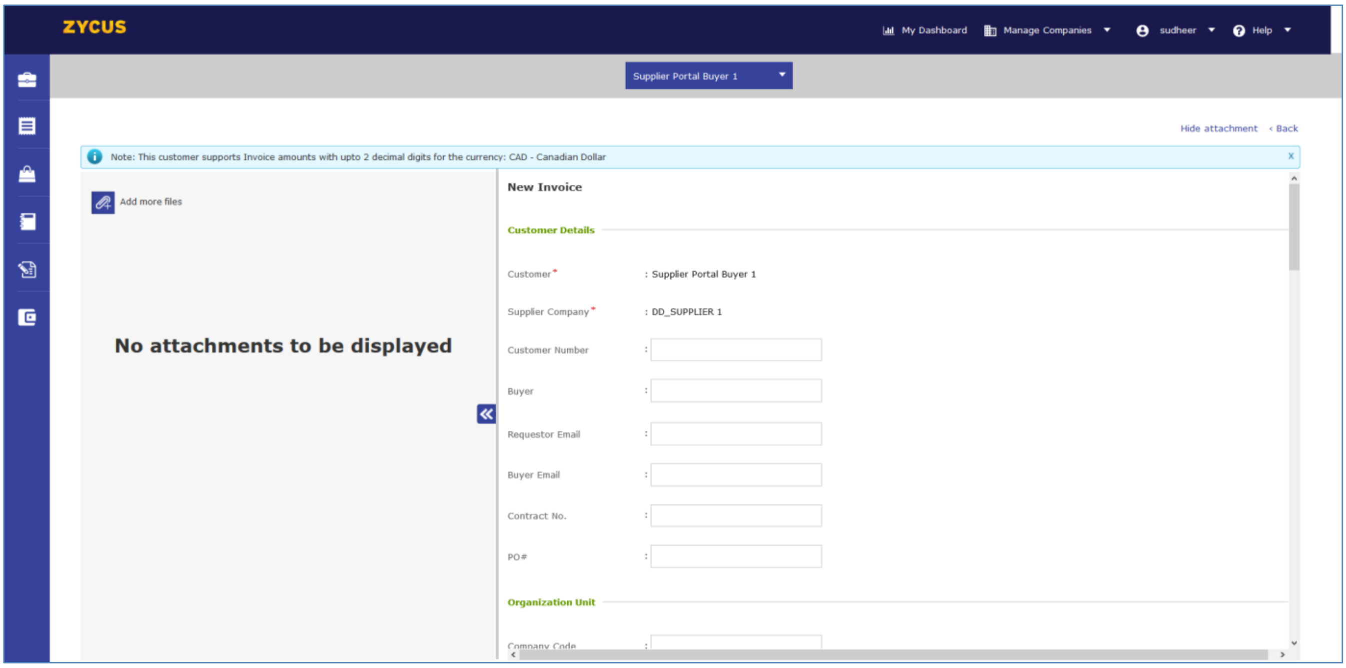
**Note: As mentioned earlier, ZSN will automatically round off all tax values as per customer supported decimal precision for the given currency.**

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:

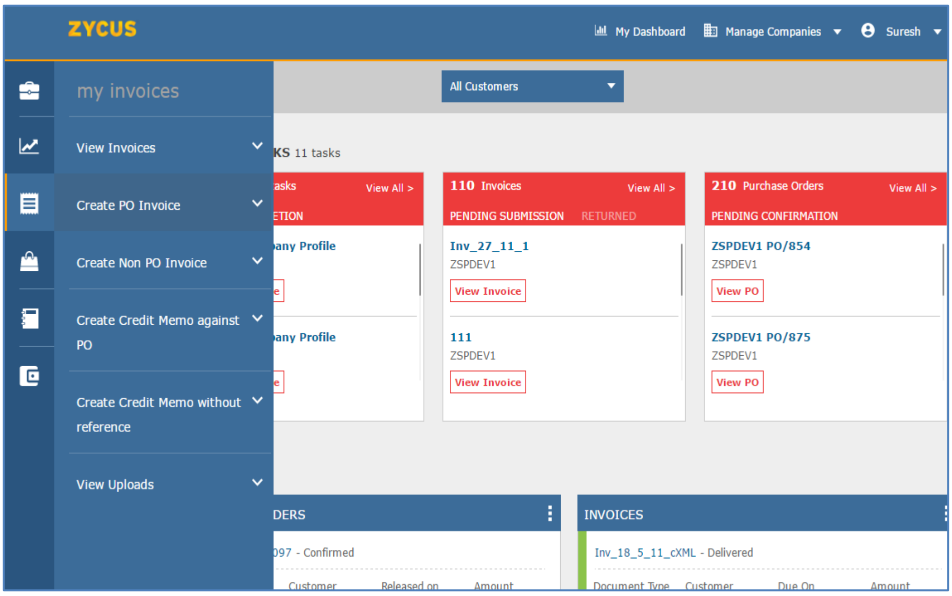



### 6.7.3.3 Understanding Side by Side Panel

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?

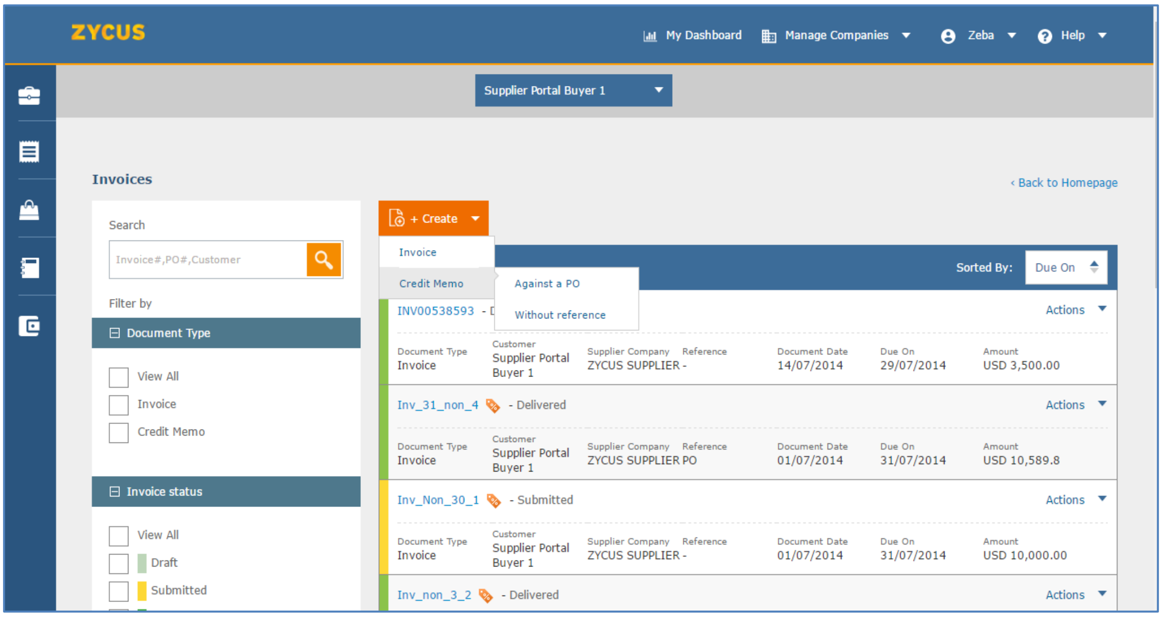
1. Suppliers can create credit memos against the previous orders or without a reference to any order as well.




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:

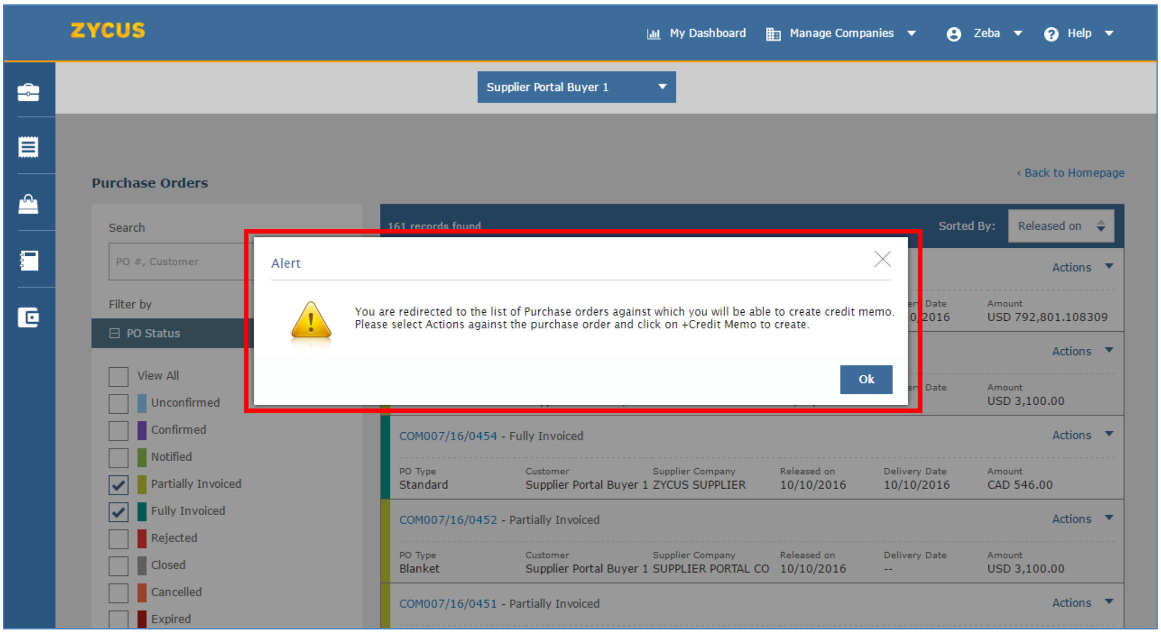
   - Credit Memo against a PO(Purchase Order)
   - Credit Memo without reference

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.




## 6.7.5 How to create Credit Memo Against a PO

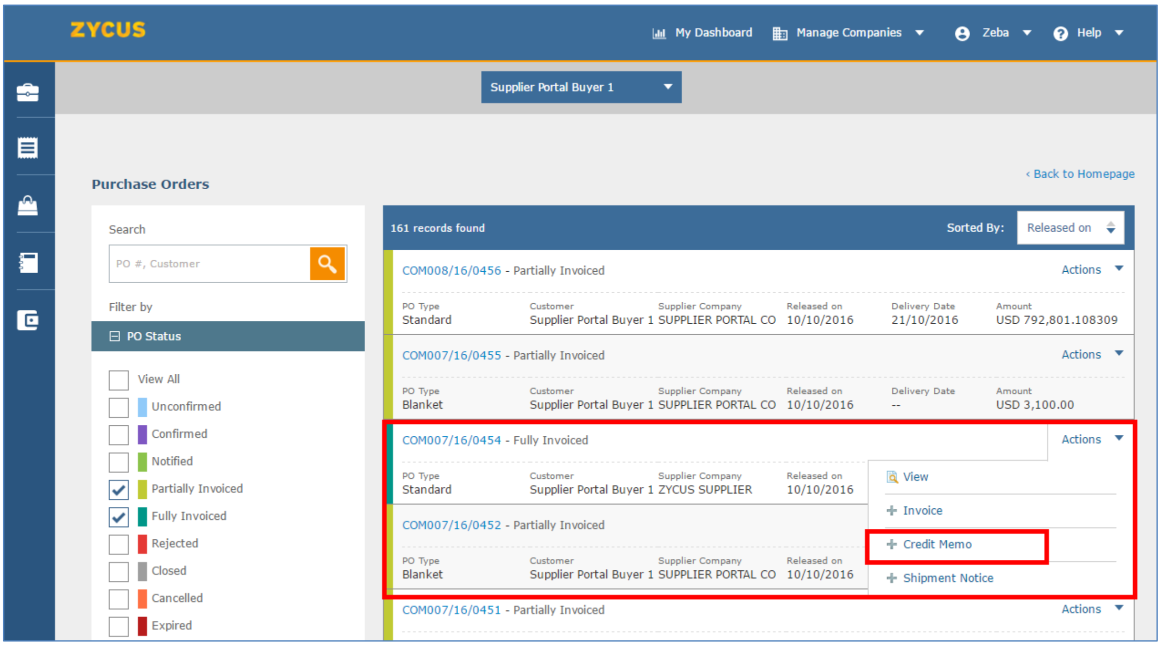
1. To create a Credit Memo against a PO the user can select the Create option from the side panel menu or the option from the Invoices listing page.
2. Once the user clicks on create against a PO then he will be redirected to the Purchase Orders listing where the User can select + Credit Memo against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



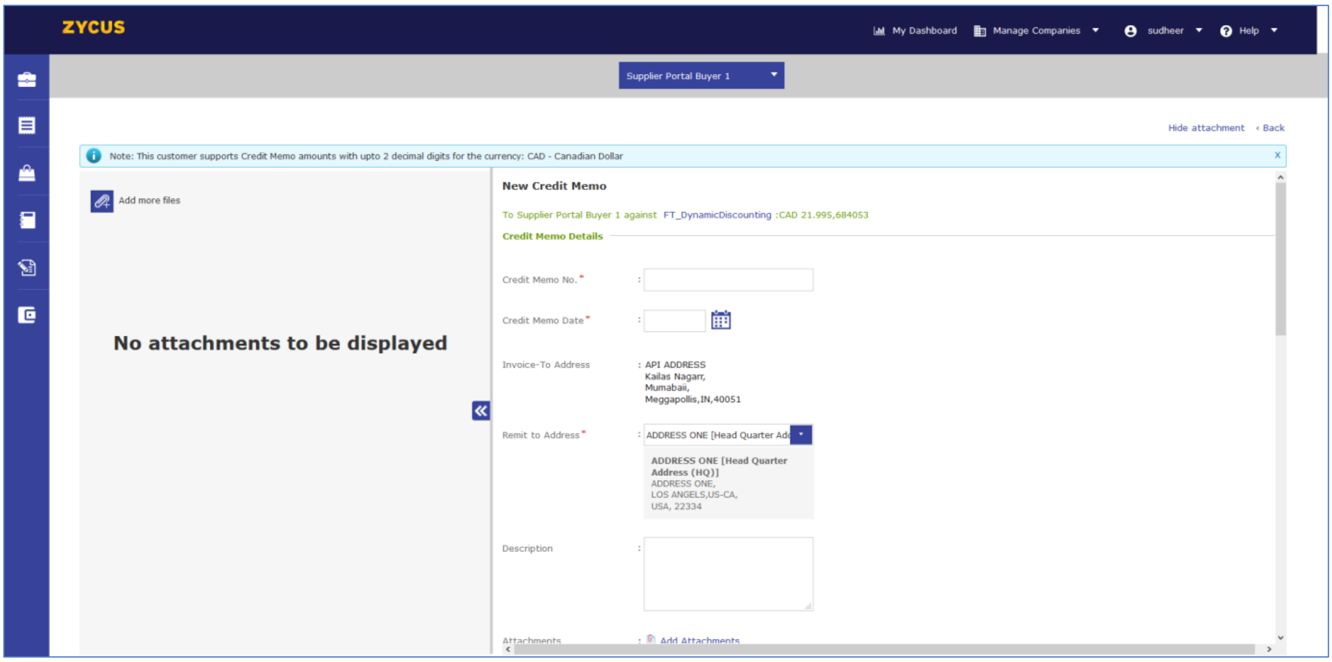
7. The user can select **Actions** > **+ Credit Memo against the PO**.

**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.

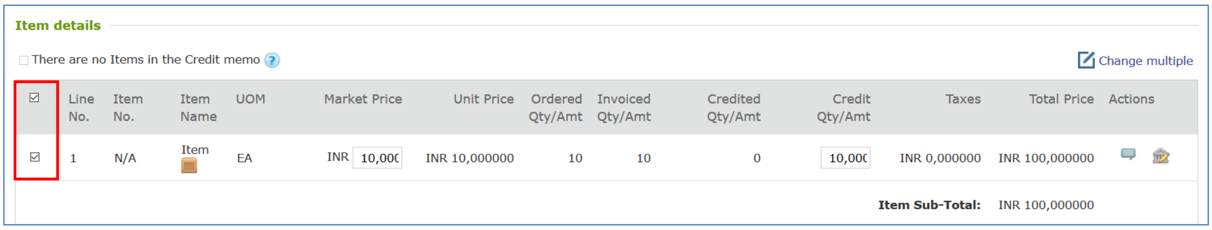



***NOTE***: Credit Memo will automatically validate values as per customer specific decimal precision.

10. Add mandatory **credit memo details** such as:
    - Credit Memo Number
    - Credit Memo Date

- Remit to Address

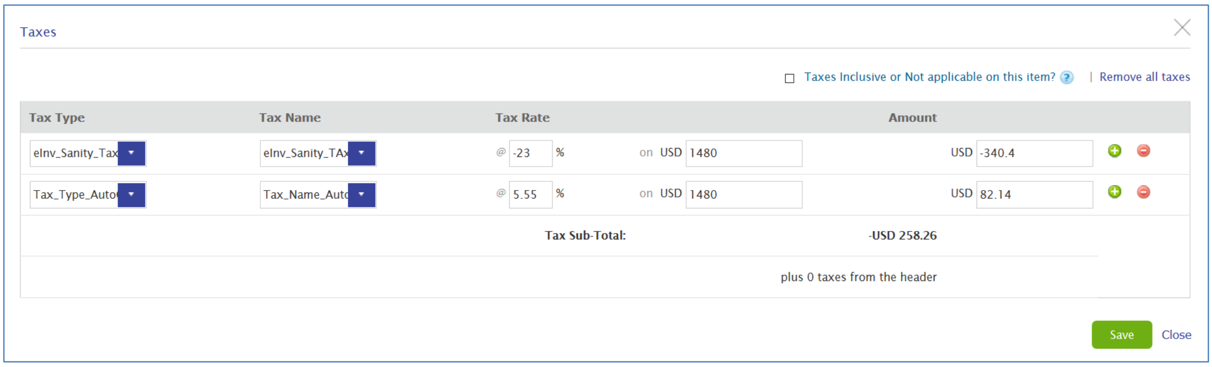
11. Under the **Item Details** section, select the items for which you want to create a credit memo.




You can view/update mandatory information such as:

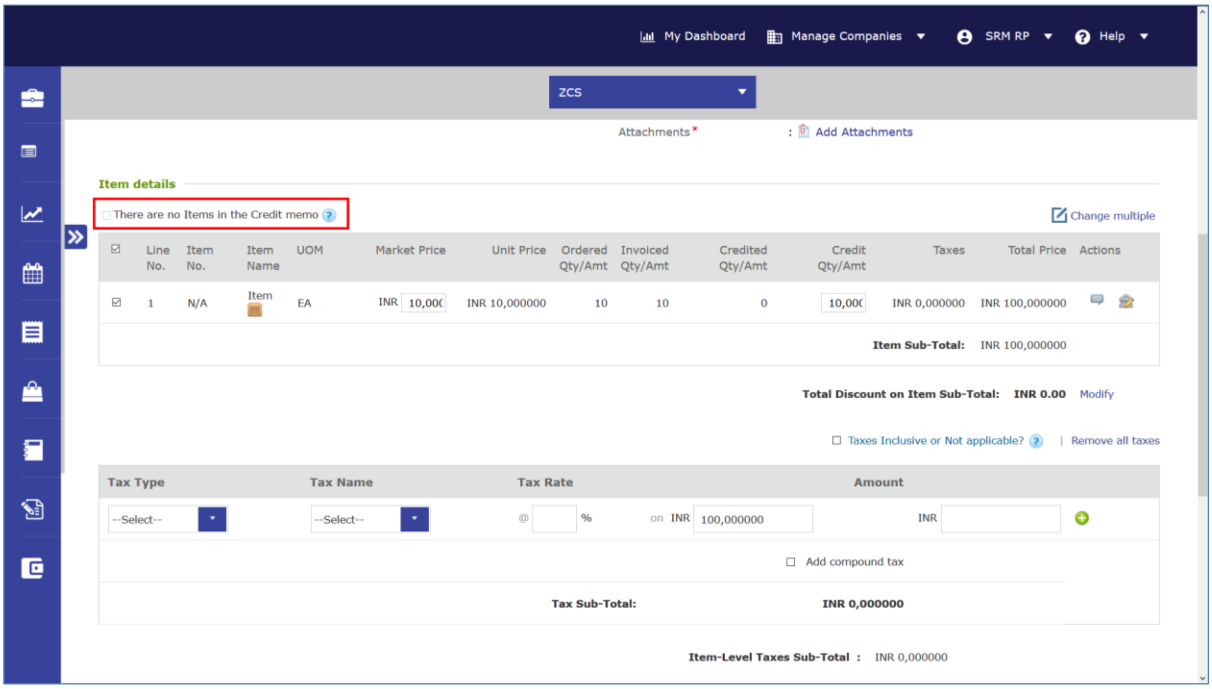
- Line No.
- Short Description
- Product Category
- Item Type
- Invoice By
- Amount
- Market Price
- Quantity & UOM

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

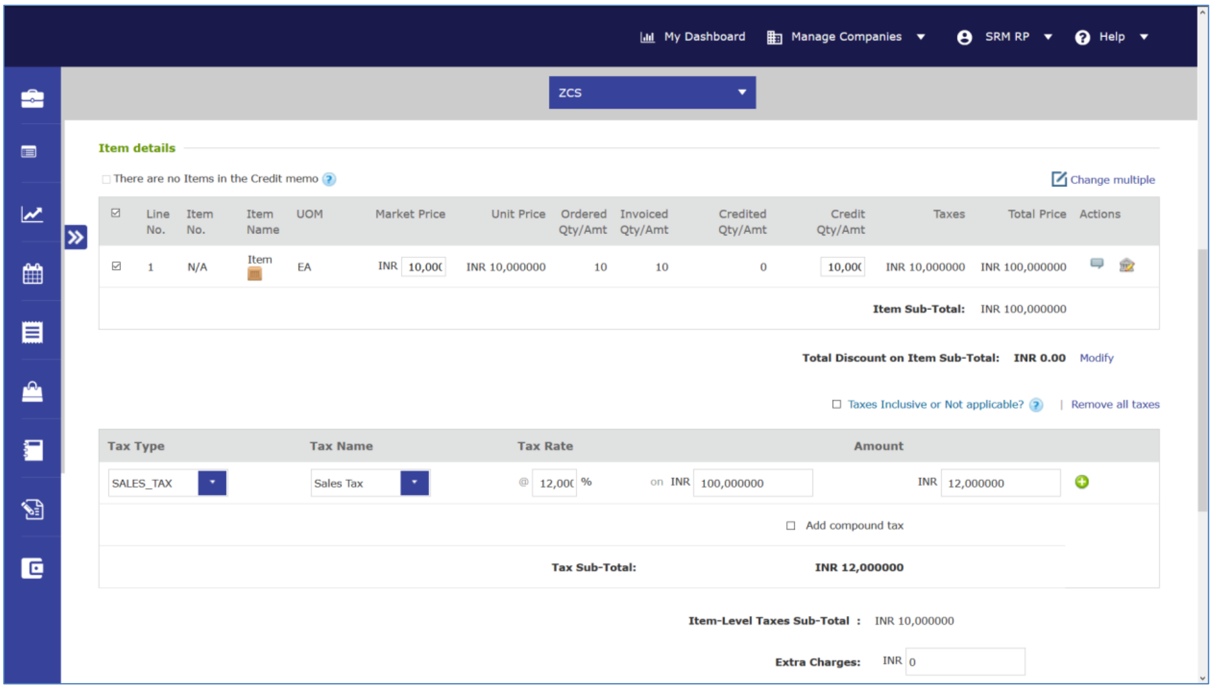



13. Suppliers will now be able to include negative taxes while generating an Invoice on the Supplier Network. While adding taxes at the header/line level on an invoice, suppliers can simply put in the “-ve” sign to indicate that it is a negative tax.
14. To add tax, select **Tax Type** and **Tax Name**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

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

### 6.7.6 How to create Credit Memo without Reference

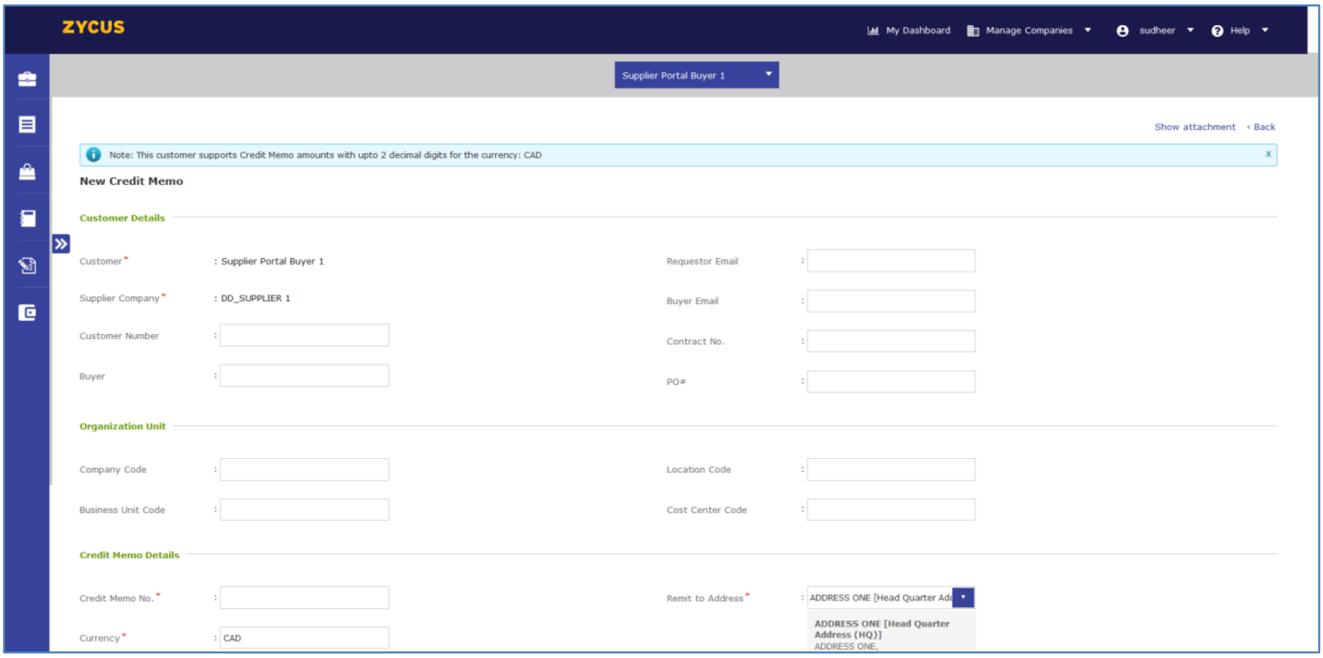
1. The user can also create a credit memo without reference.

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. Once the details are added, submit the credit memo for apportionment.

For more reference on this section, refer Section 6.7.5. How to create Credit Memo Against a PO.



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### 6.7.7 Credit Memo handling on ZSN

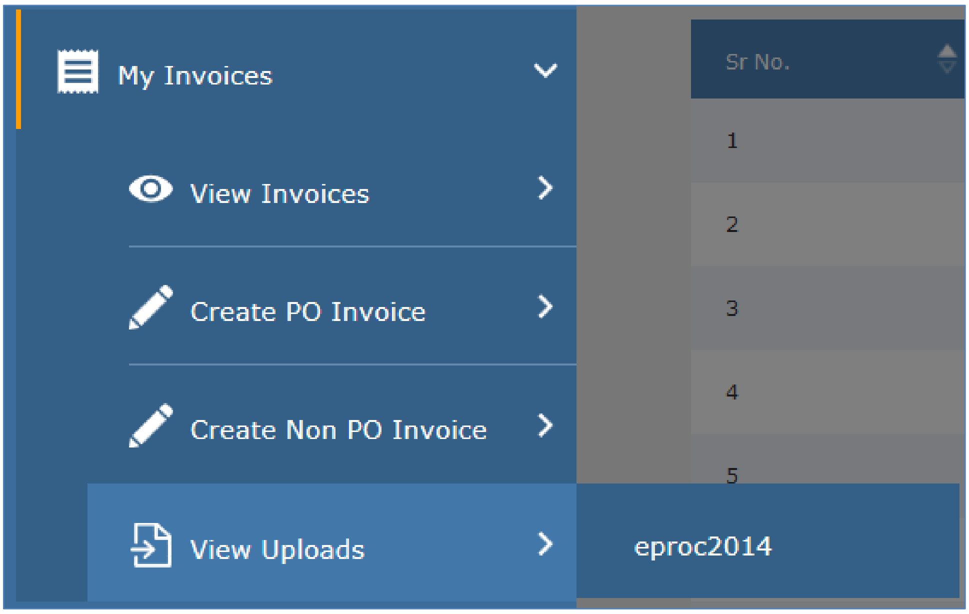
1. Once the user creates a credit memo against a PO, then that invoiced quantity/amount will be credited which will allow the user to create invoices against the PO for the same quantity again.
2. The credit memo once submitted will be sent to eInvoice for AP manager to review, where the status of Credit 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?

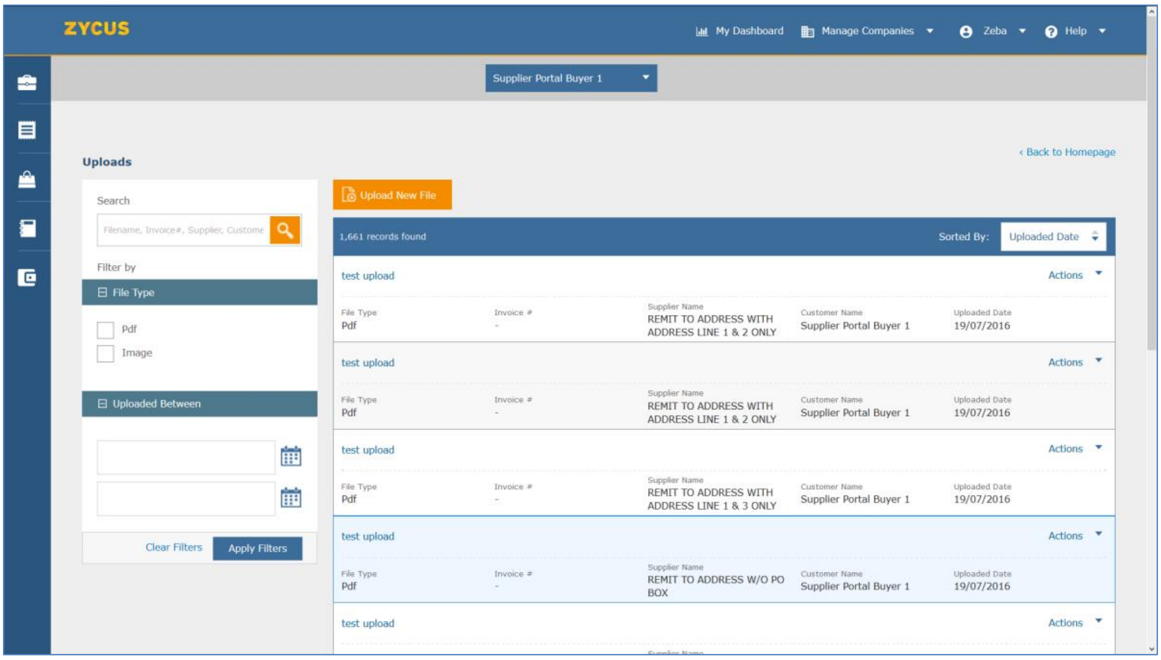
1. The **View Uploads** option allows the user to view the documents uploaded by you for a customer.

***NOTE:*** Files under uploads will be visible only to you and not to your customer.

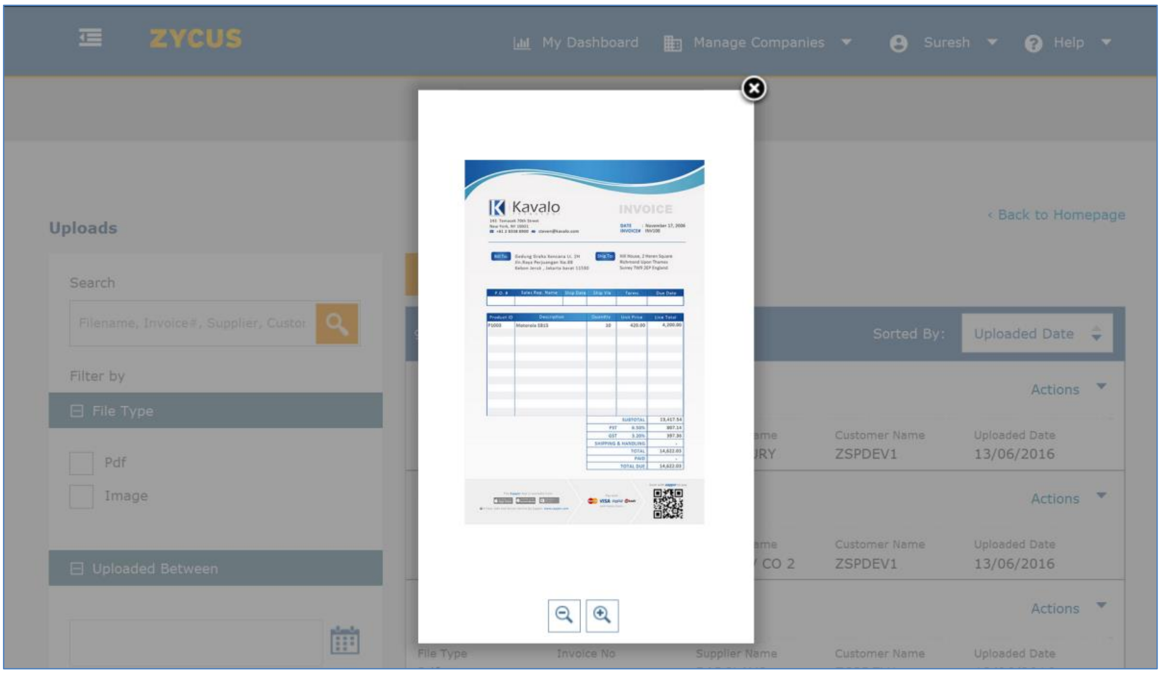
2. Click on **My Invoices**. Hover over **View Uploads**. You will be able to see list of customers for which you can check your uploads.



3. Select the customer for which you want to view the upload. You will be redirected to the following page:

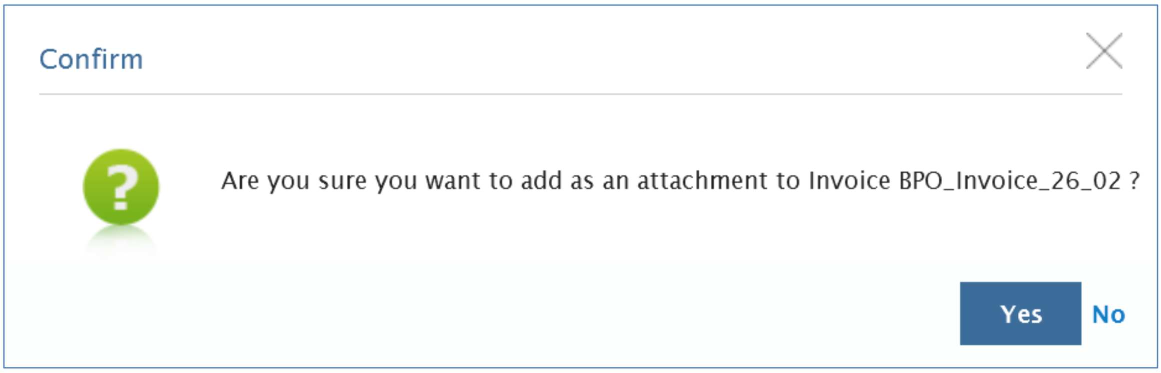


4. Click on **Actions** drop-down menu to:
   a. View the upload
      - You can upload files with format **.jpg;*.jpeg;*.gif;*.png;*.bmp;*.pdf.**
      - You can filter the files as **Pdf** or **Image.**
      - Click on the file to preview it. The file will be displayed as shown below:



   b. Create PO Invoice
   c. Create Non-PO Invoice

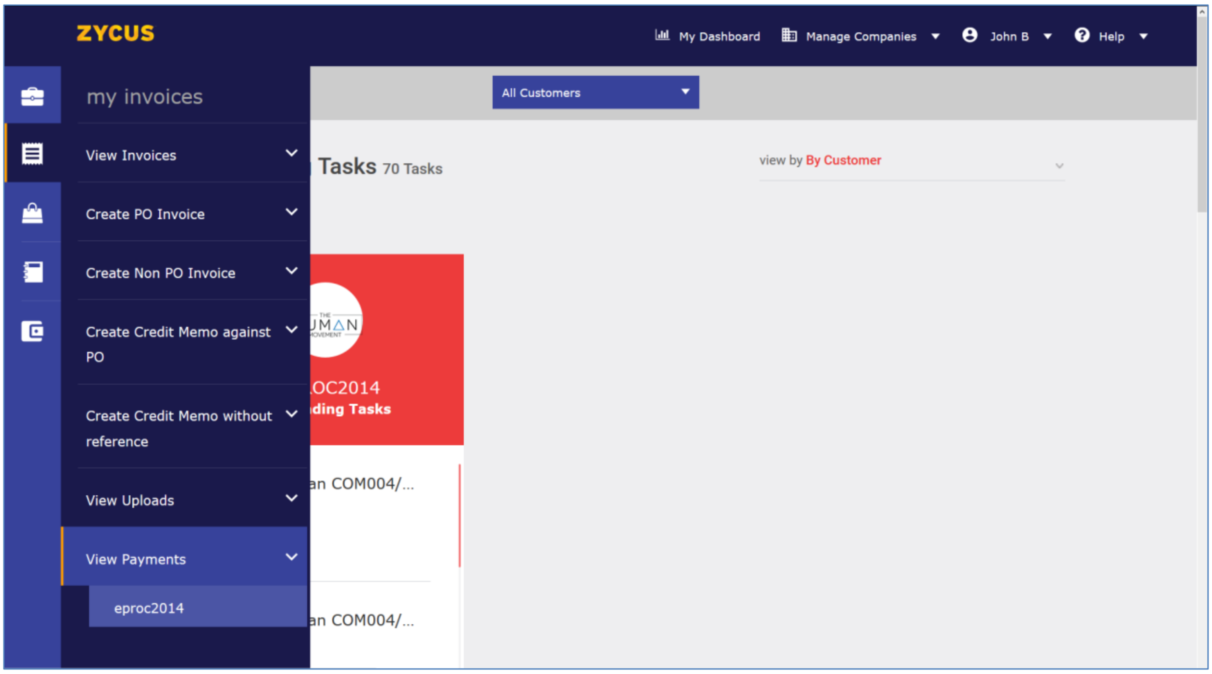
d. Create Credit Memo against PO
e. Create Credit Memo without reference
f. Add as an Attachment:
   - When you lick Add as Attachment, it will redirect you to the PO listing page, where you can attach the file to an existing PO which is in **Draft** stage or **Rejected.**
   - Click on the PO to which you want to attach the file, you will see the following popup:



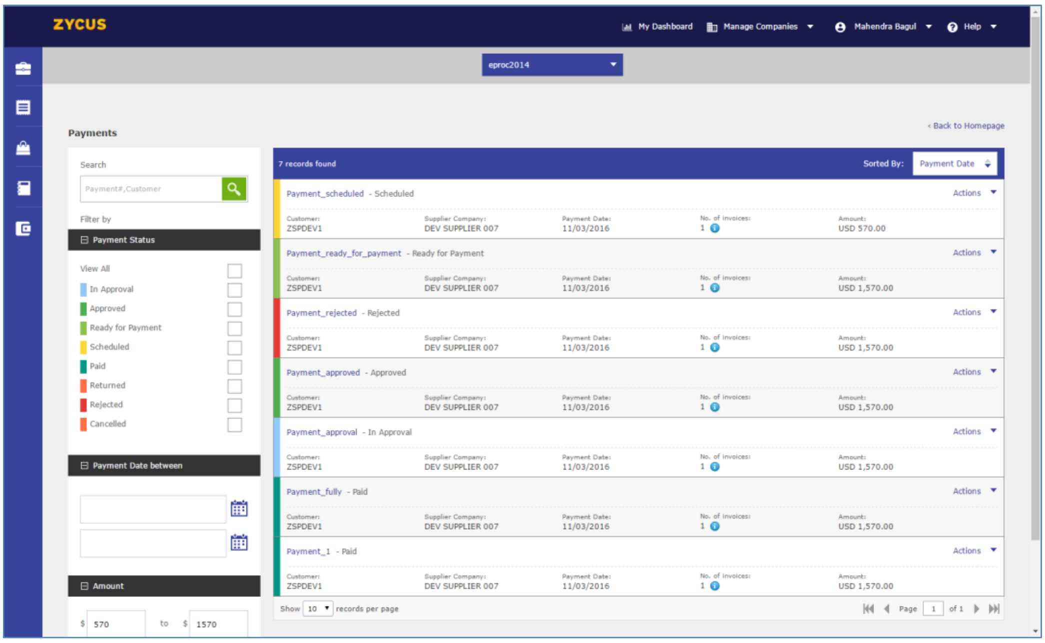
### 6.7.9 How to View Payments in eInvoice?

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:



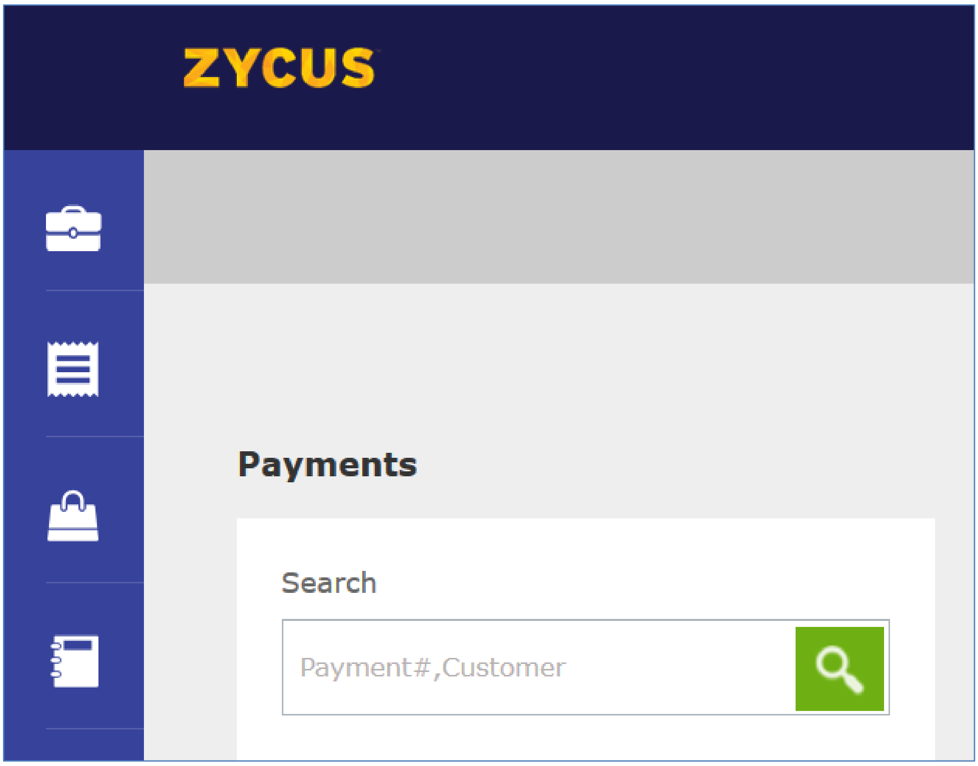
2. On the **Payments** page, you will be able to view following details for each payment:
    - Payment Reference Number
    - Customer
    - Payment date
    - No of Invoices Paid (hover on ⓘ, the invoices number will be showed)
    - Payment amount - currency to be appended in front of the amount
    - 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*

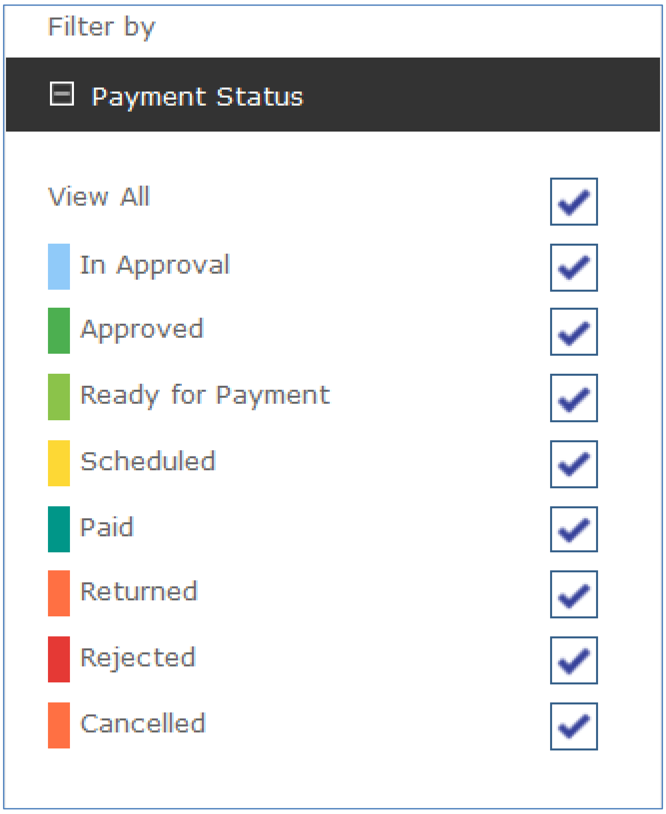
1. You can search for payments by **Payment Number** and **Customer** on the **Payments** listing page as shown below:



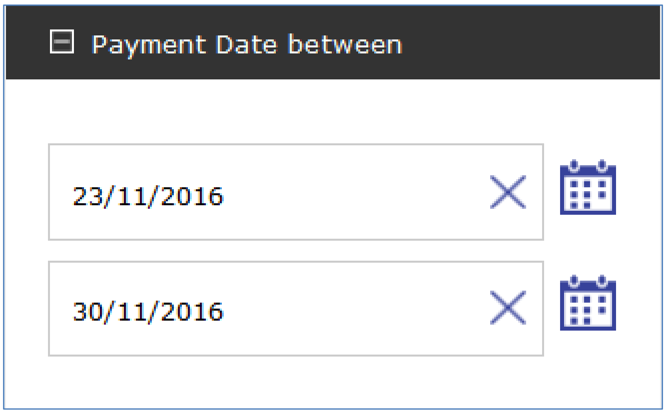
### 6.7.9.2 *Filtering Payments*

You can filter the payments based on the following parameters:

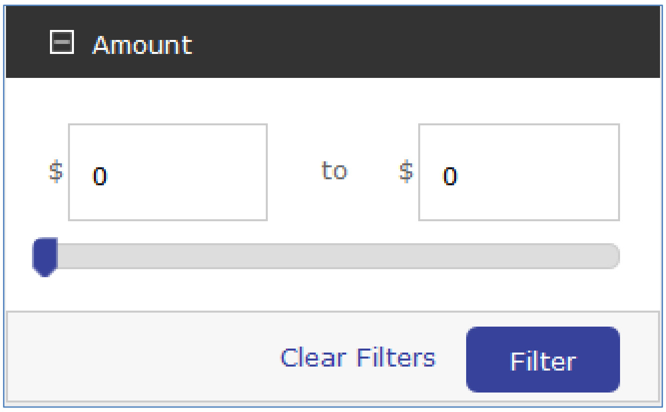
- **Payment status:** Select a status to view the invoices under that particular status.




- **Payment Date between:** Select start and end date using the icon to view payments dated between the selected date ranges.



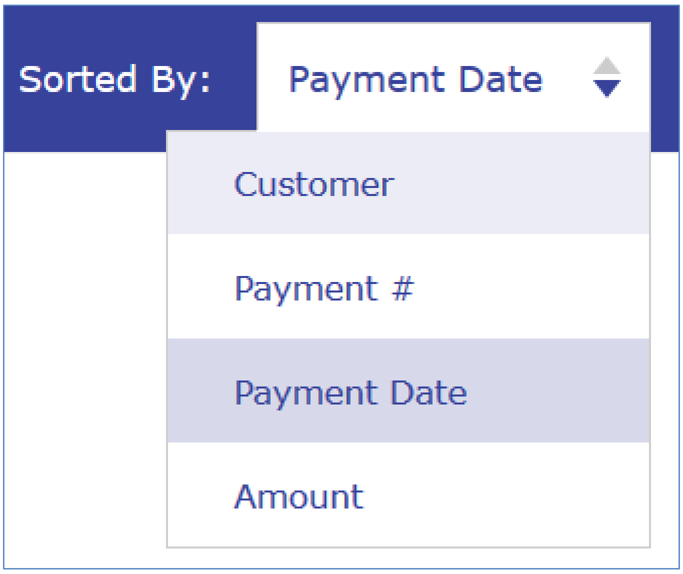

- **Amount:** Using the slider, select the start and end amount to view payments whose amount lies in the selected amount range. **OR** Enter the start and end amount in the text boxes.




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

#### *6.7.9.3 Sorting Payments*

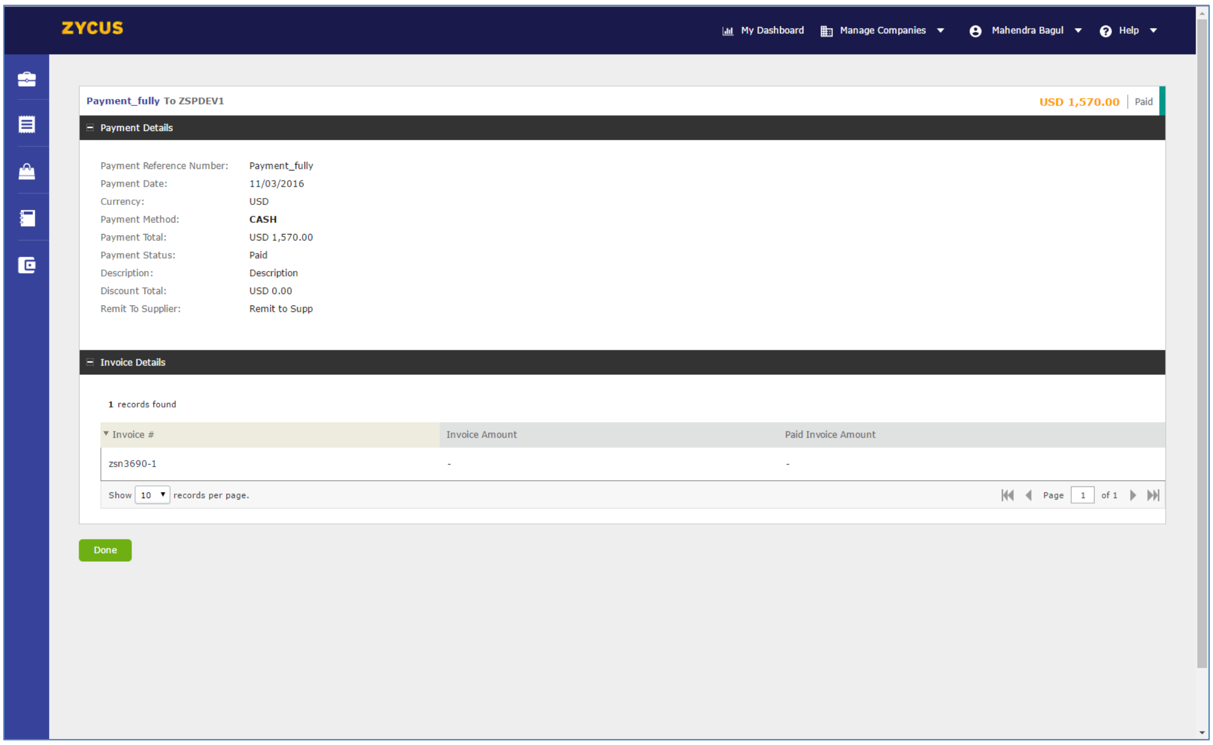
1. You can sort the entries on **Payments** by:
   - Customer Name
   - Payment Number
   - Payment Date
   - Amount




**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:



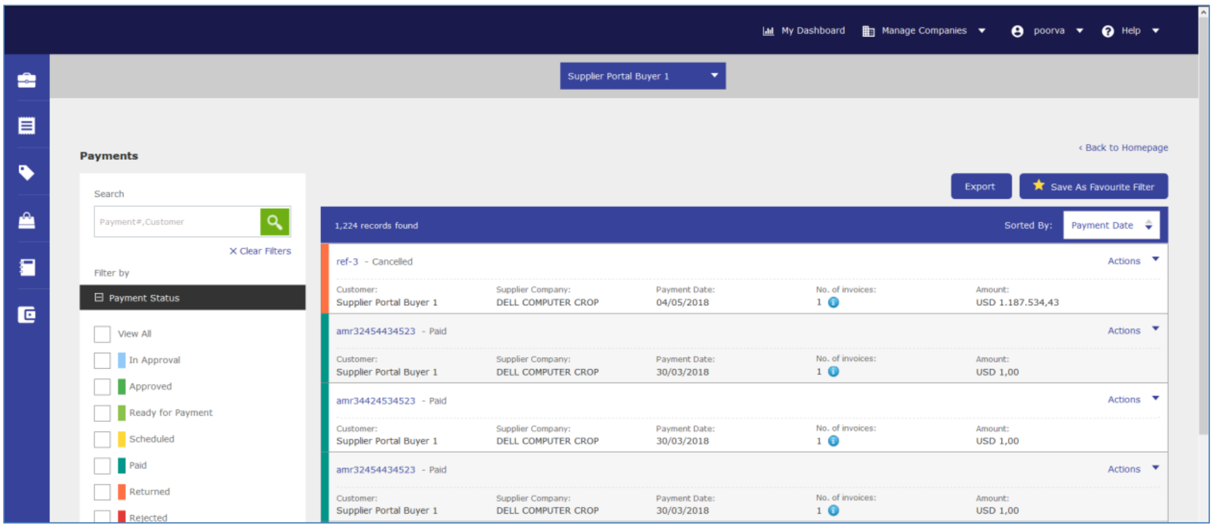

2. You can also view the payment details page by click on the **Payment Reference Number**.

**Note:** You can also add **Payments** card on the **ZSN** home page.

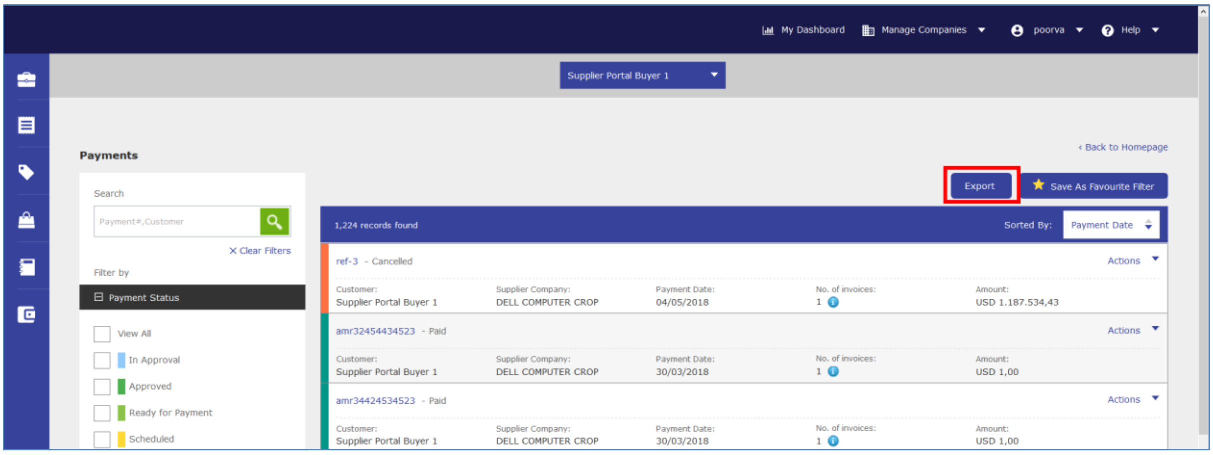
#### 6.7.9.5 *Exporting Payment Details*

From this listing page, you have an option to download details of all your payments. To download the payment details, follow the steps below:

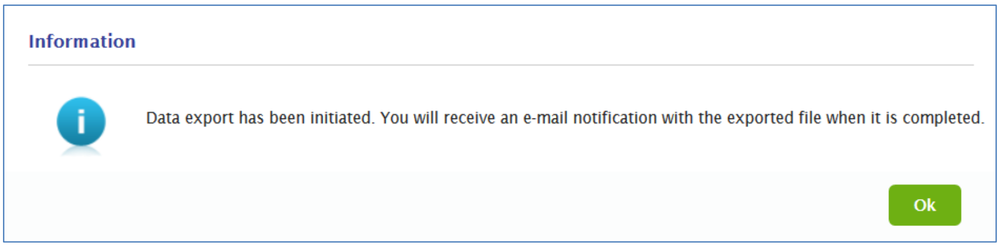
1. Navigate to Payment listing page from **Side Panel** > **My Orders** > **View PO** > *Customer Name*. You will land on the following page:



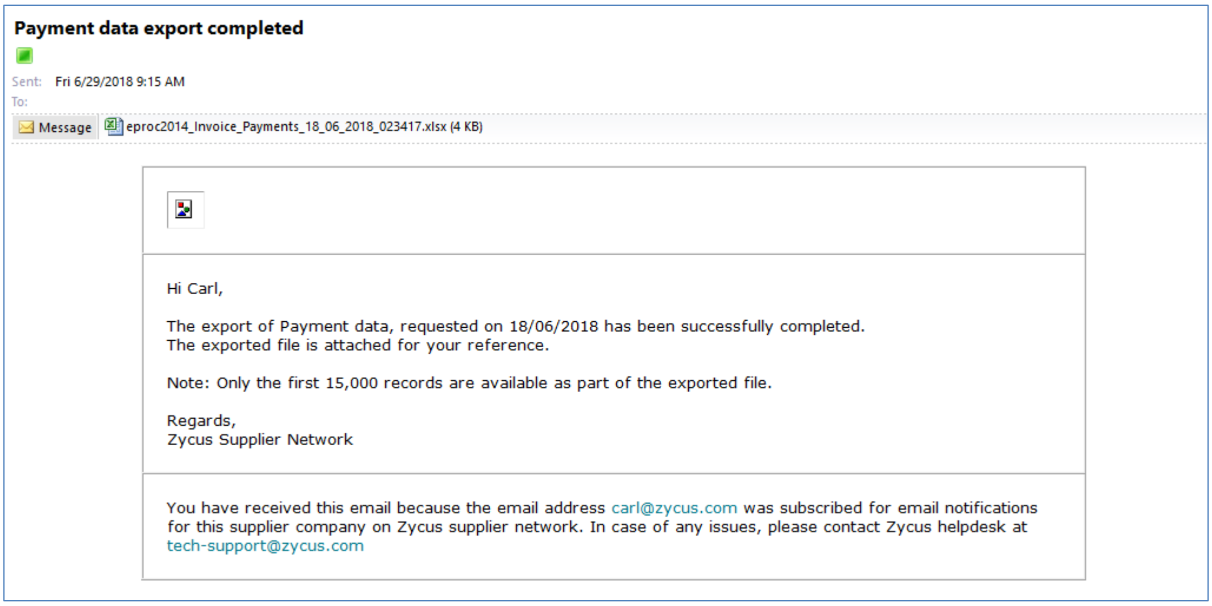

2. To export the Payment details, click **Export** as highlighted in the image below:




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:



**Payment data export completed**

Sent: Fri 6/29/2018 9:15 AM

To:

Message | eproc2014_Invoice_Payments_18_06_2018_023417.xlsx (4 KB)

Hi Carl,

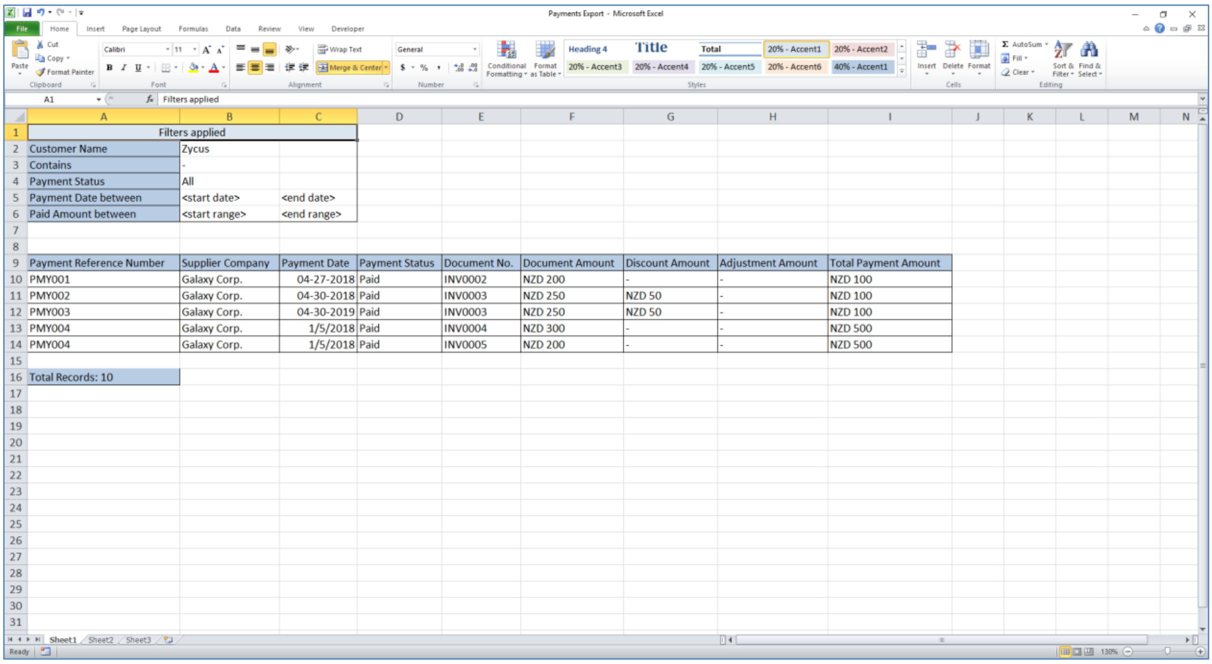
The export of Payment data, requested on 18/06/2018 has been successfully completed.
The exported file is attached for your reference.

Note: Only the first 15,000 records are available as part of the exported file.

Regards,
Zycus Supplier Network

You have received this email because the email address carl@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

5. Open the file to view your Payment details:



| Filters applied | | |
|---|---|---|
| Customer Name | Zycus | |
| Contains | - | |
| Payment Status | All | |
| Payment Date between | <start date> | <end date> |
| Paid Amount between | <start range> | <end range> |

| 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 |

Total Records: 10

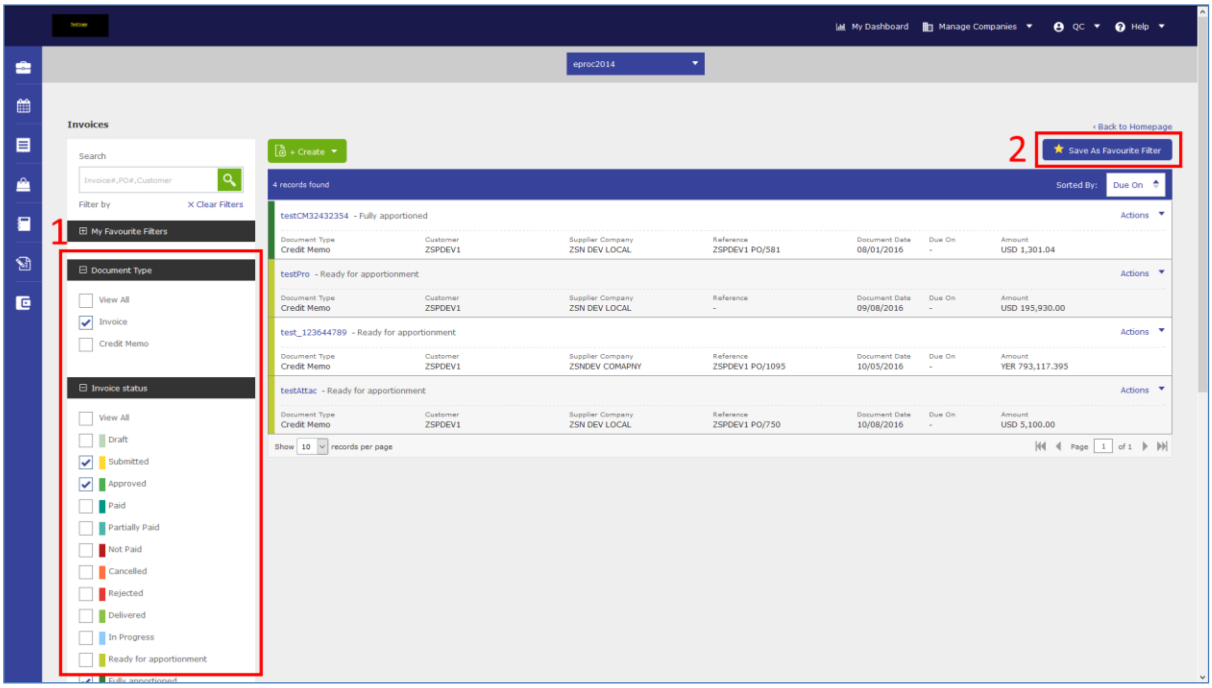
**Note:** The data exported will be as per the filter applied on the listing page. You will be able to view the applied filters in the exported file as well. The maximum limit on the number of records exported is 15,000. Records beyond 15,000 will not be part of the exported file.

### 6.7.10 Marking Filters as Favorites

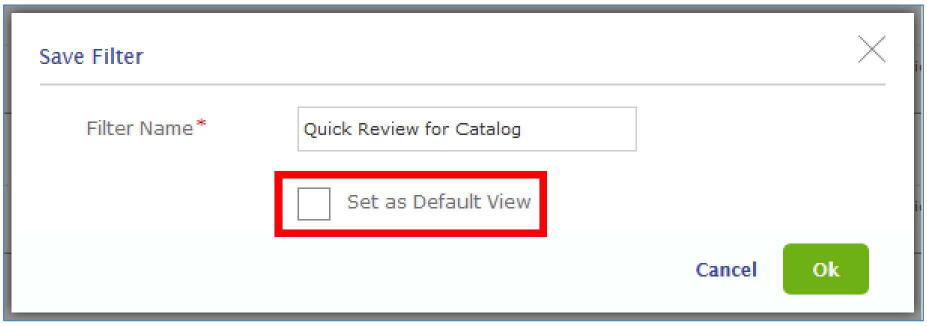
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

To mark filter as favorite,

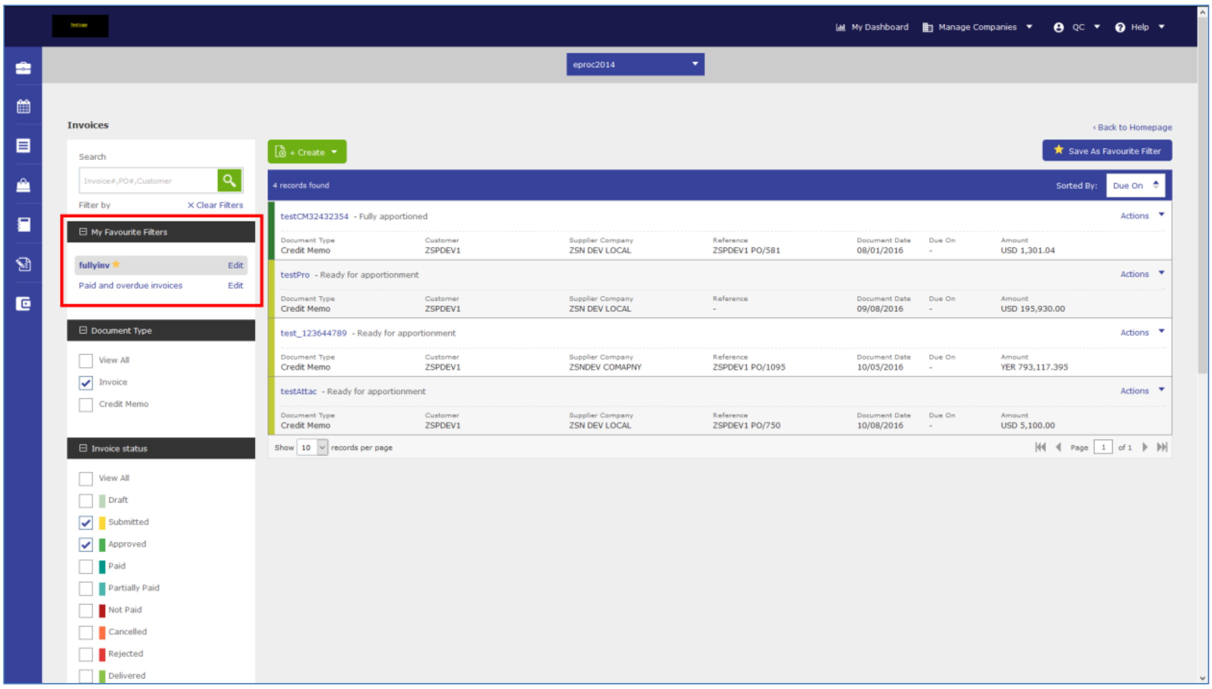
1. Select the filter parameters from the left panel and click the **Save as Favorite Filter** button as shown in the image below:



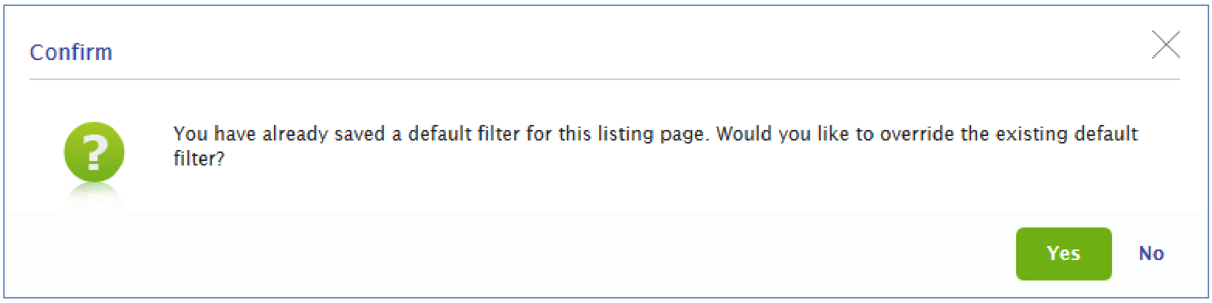

2. Once you choose to save a filter, you will have to name it as shown below:



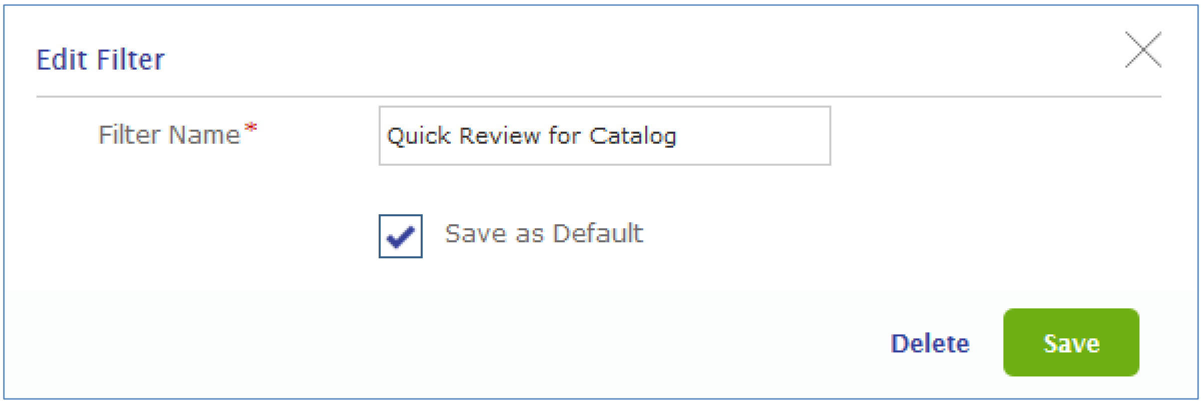

3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.
4. Saved filters will be available in the left panel of the listing page as shown below:




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.

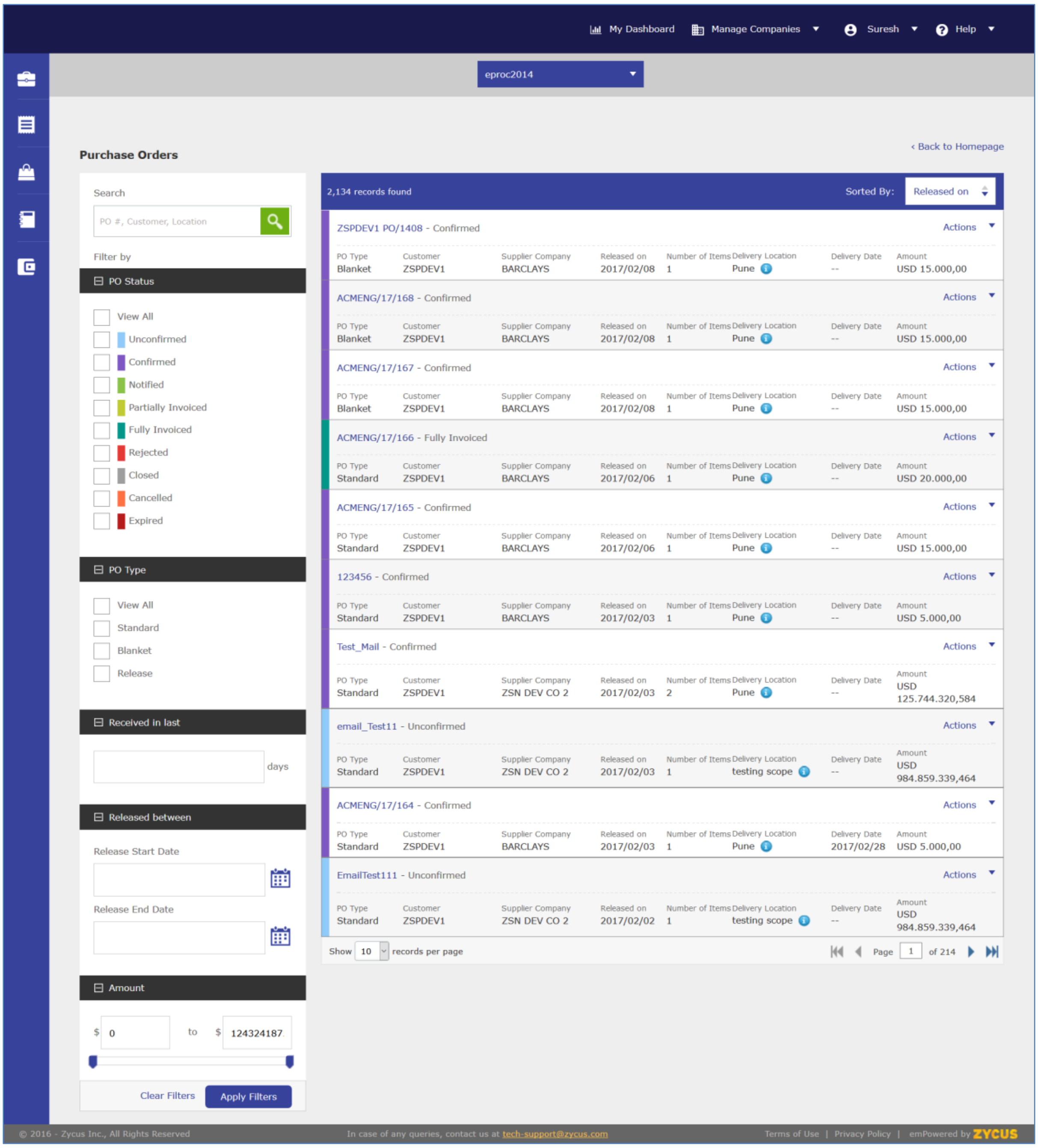


8. Uncheck the box against **Save as Default** and click **Save**.
9. If you wish to delete a filter, click **Delete** in the popup shown above.

## 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.



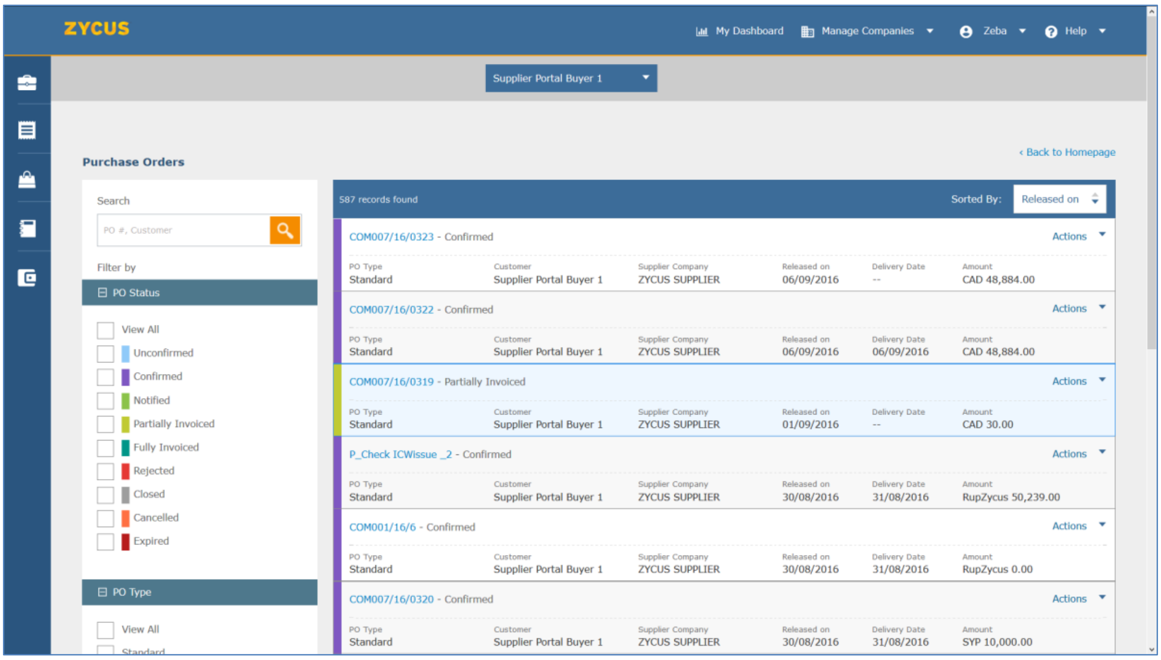

**Note:** You can view the Deliver To location on the PO listing page itself.

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.

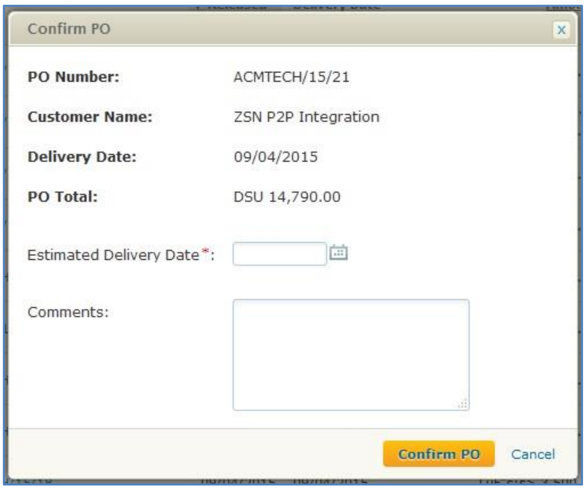



2. Look for the required purchase order using the Search, Filter or Sort options.

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.



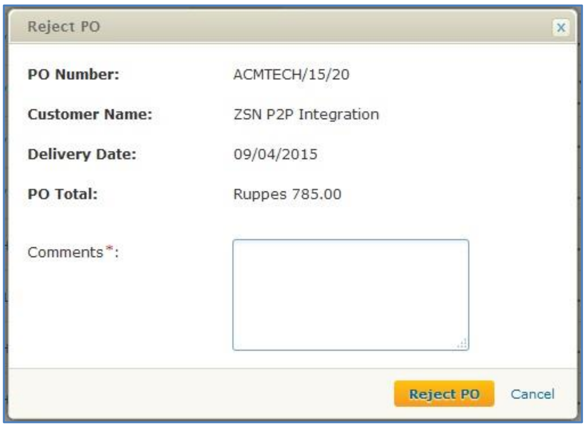

2. Select the **Estimated Delivery Date** for the Purchase Order.

3. Enter the required comments.

4. Click **Confirm PO** to approve the PO.

B. **Rejecting PO**

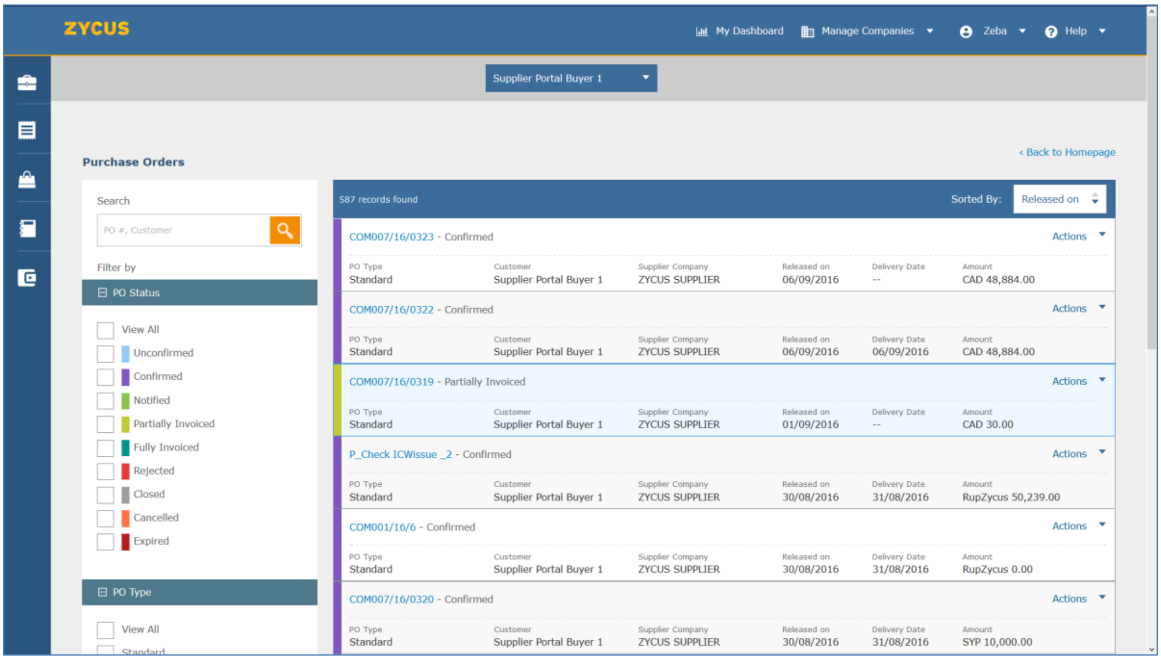
1. Click on the Reject icon corresponding to the required Purchase Order to reject the PO.



2. Enter the required comments.
3. Click **Reject PO** to reject the PO.

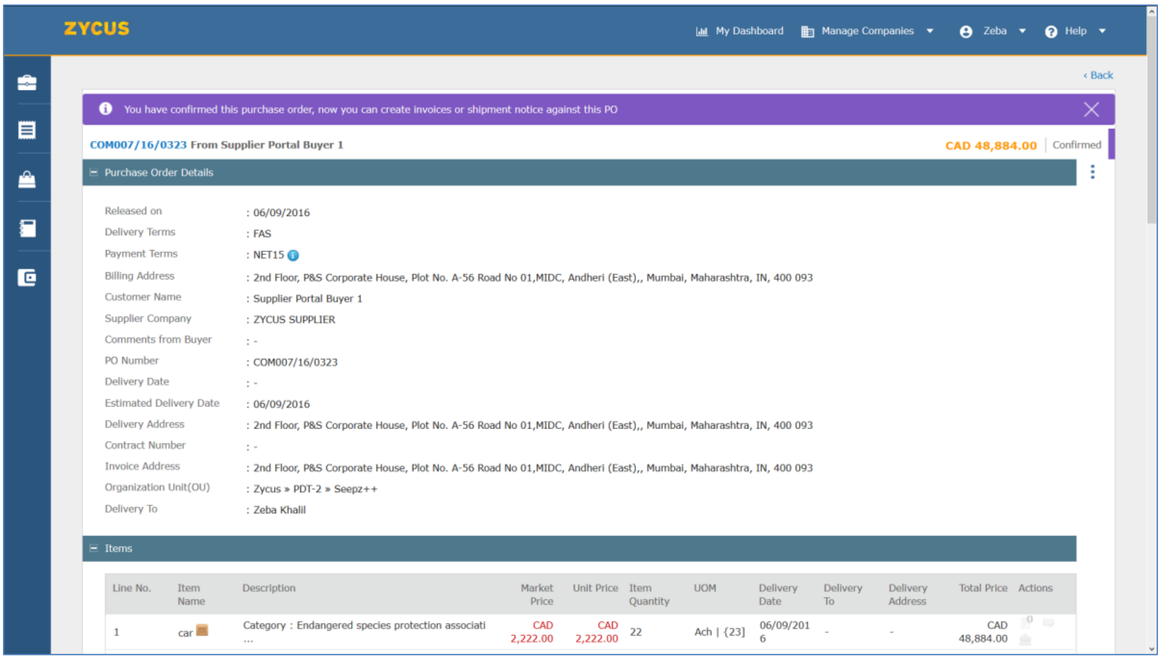
### *Download PO as PDF*

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.

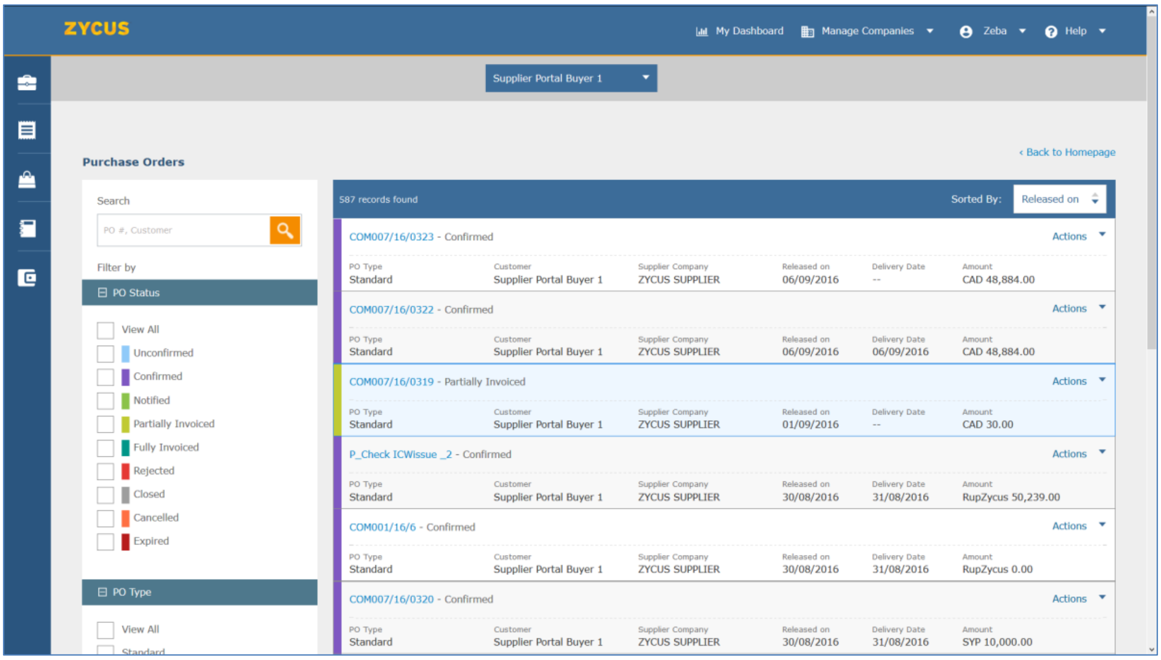
3. Click on the View PO icon from menu corresponding to the required Invoice.



4. Click on the menu and select **Download as PDF.**

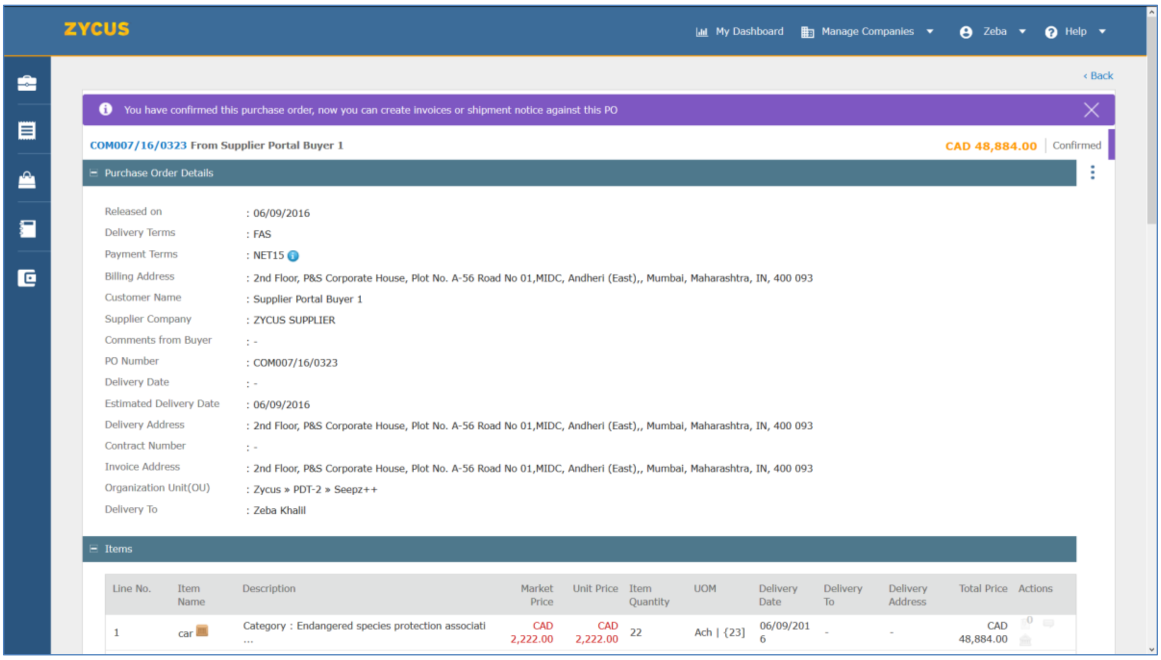
### *Preview PO cXML*

1. Navigate to the following location: Side Panel > **My Orders**> **View Orders** > Required Customer Company.




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

3. Click on the PO number to view PO.



4. Click on the **Actions** menu and select **Preview PO CXML.**

## 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



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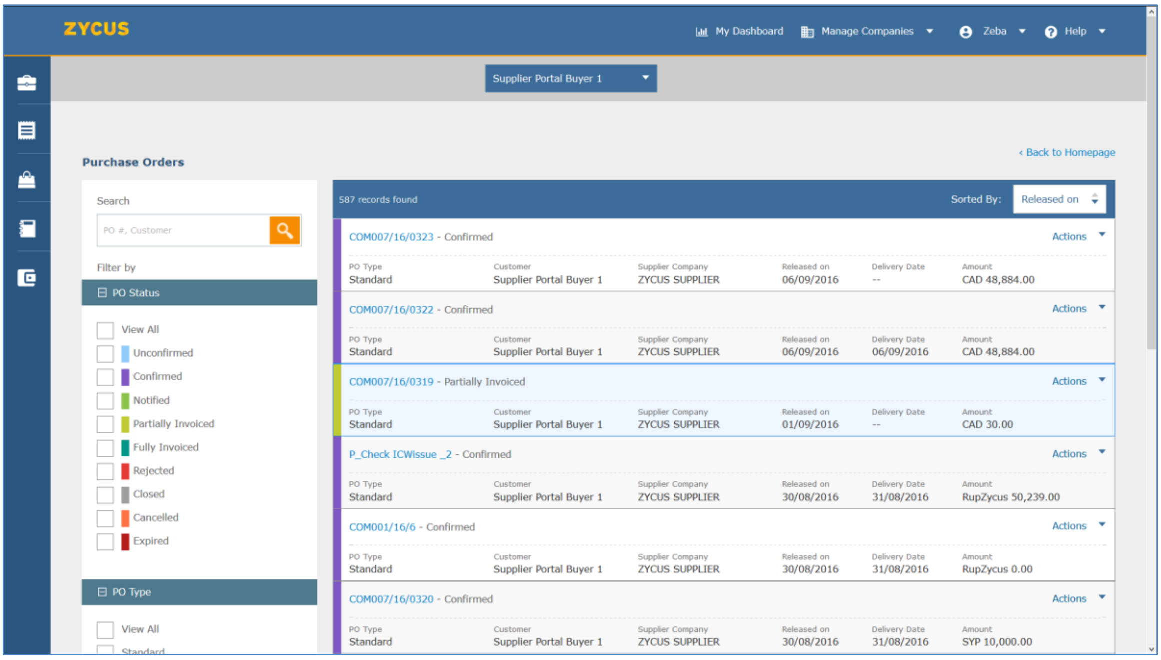
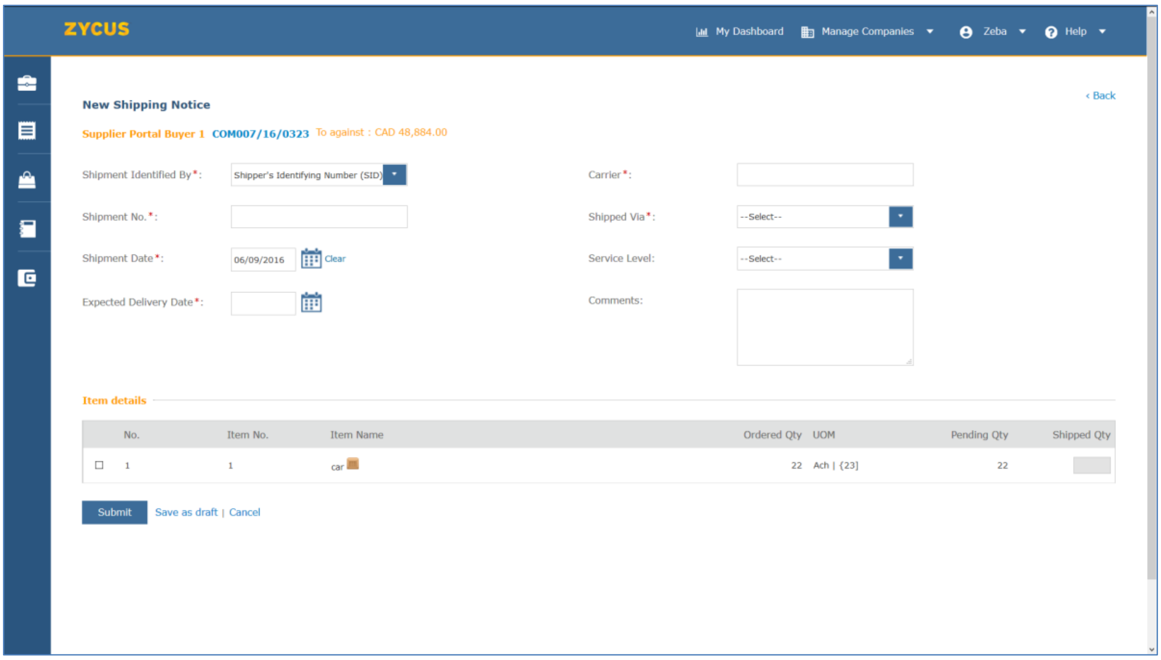



3. Click on the Shipment Notice icon under actions corresponding to the required Purchase Order.

4. Enter the required details on the **New Shipping Notice** page.




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


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

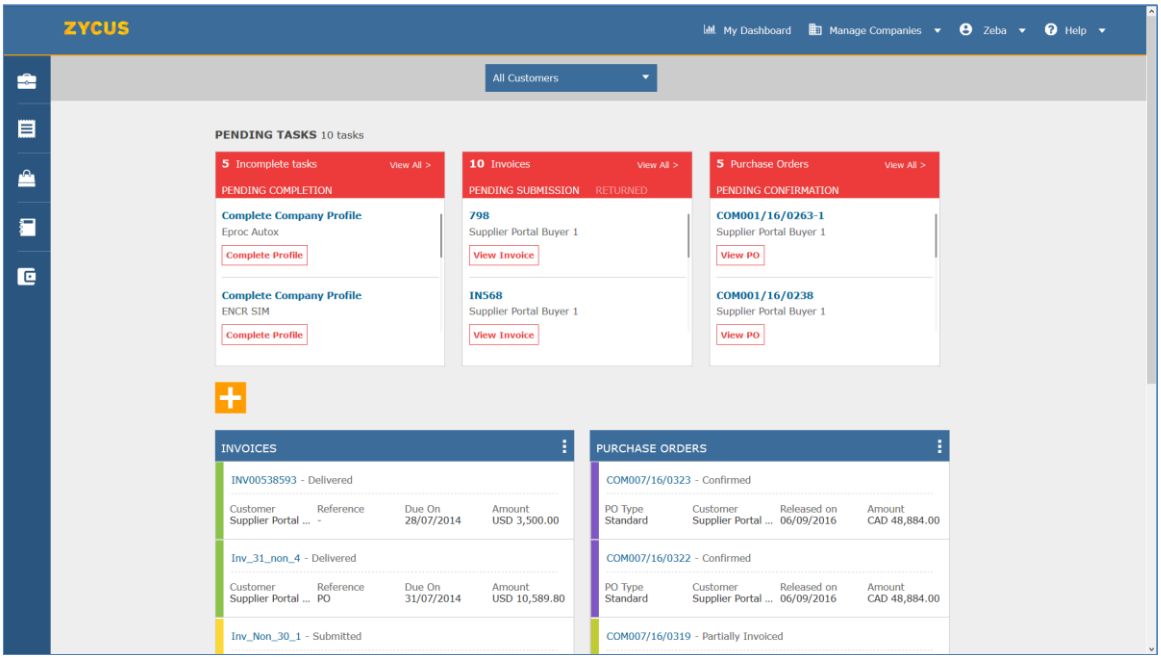
A. **Cancel**: To discard the changes made in the shipment notice and exit.
B. **Save as draft**: To save the changes made in the shipment notice and exit.
C. **Submit**: To save the changes made in the invoice and submit the shipment notice for processing.

*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.*

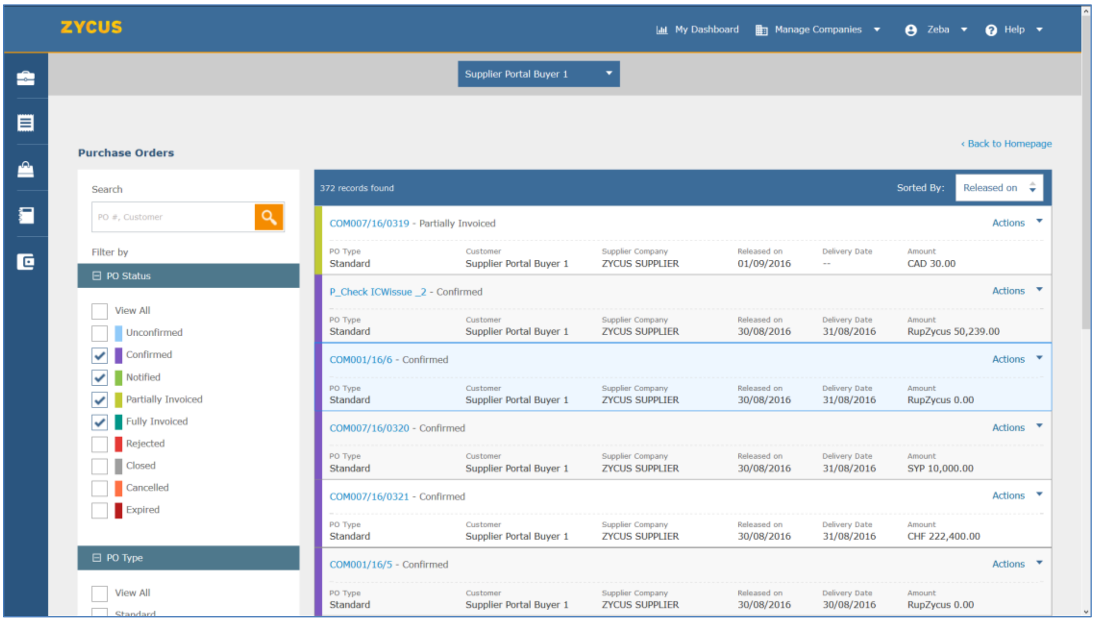
### 6.8.3 How to Create Direct Invoice against a Blanket Purchase Order?

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**.

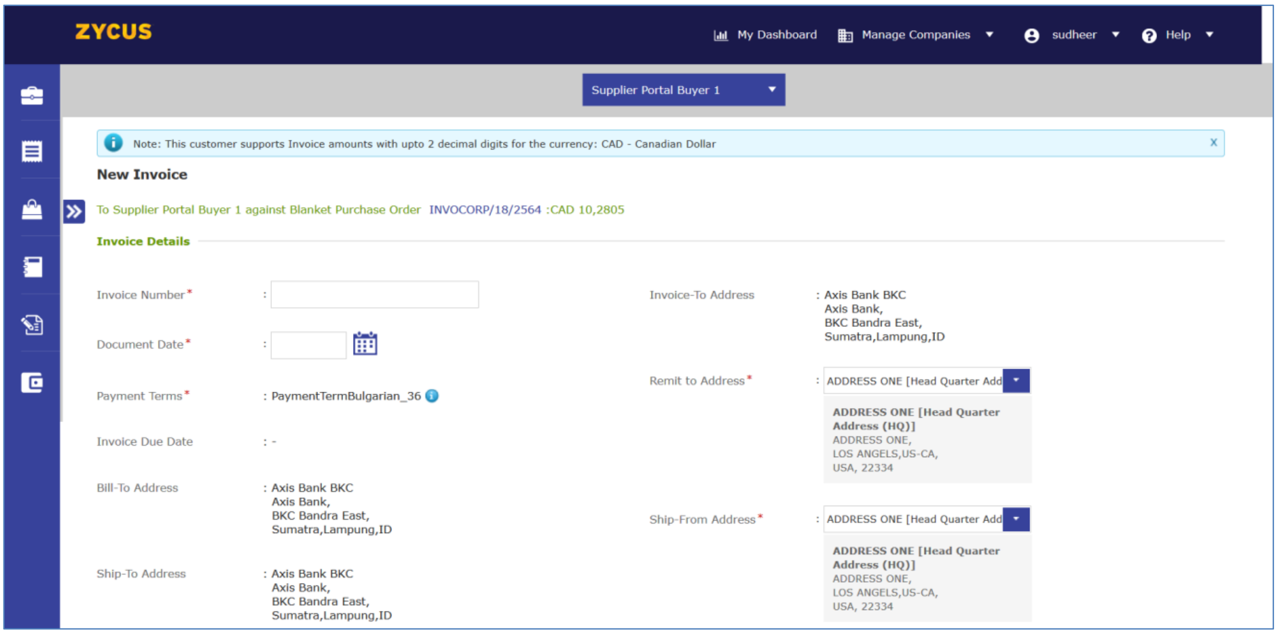


4. Click on **View More** to view the list of PO. You will be redirected to following page:



5. 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.
6. Select the BPO against which you want to make an invoice, click on **Actions** drop-down menu, and select **+ Invoice**.


7. Following page will be displayed. Fill in the details in the invoice.



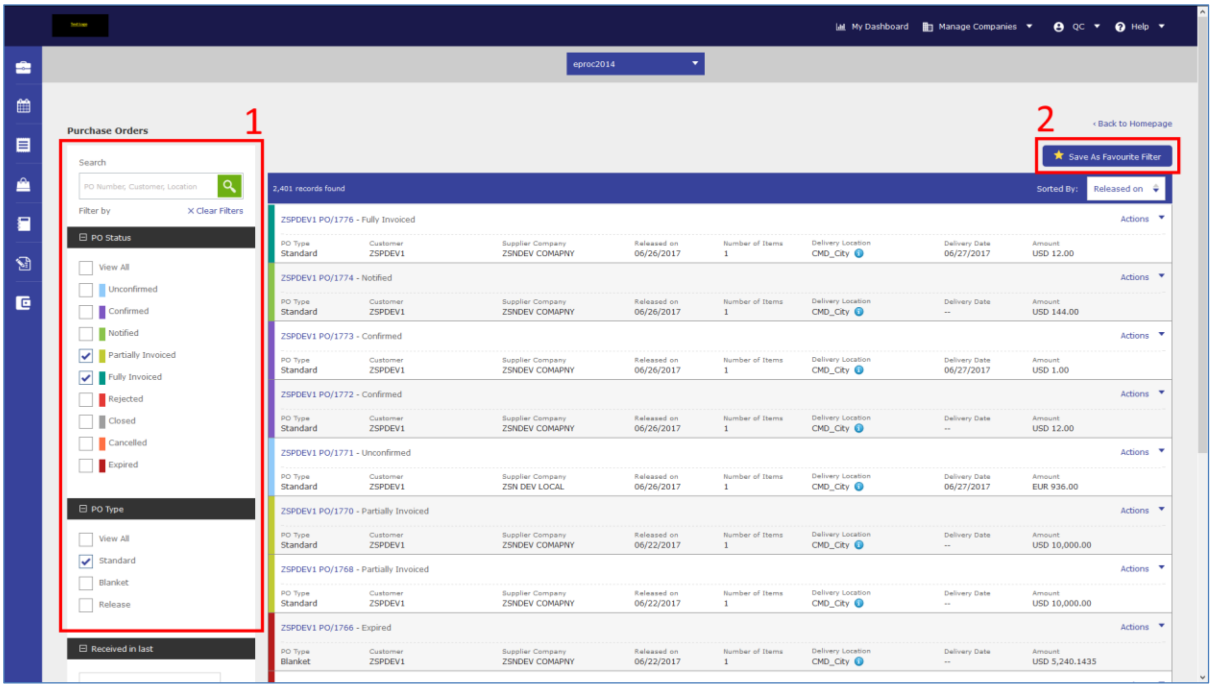

8. Once you complete filling the invoice, you can submit or save the invoice as draft.

### 6.8.4 Marking Filters as Favorites

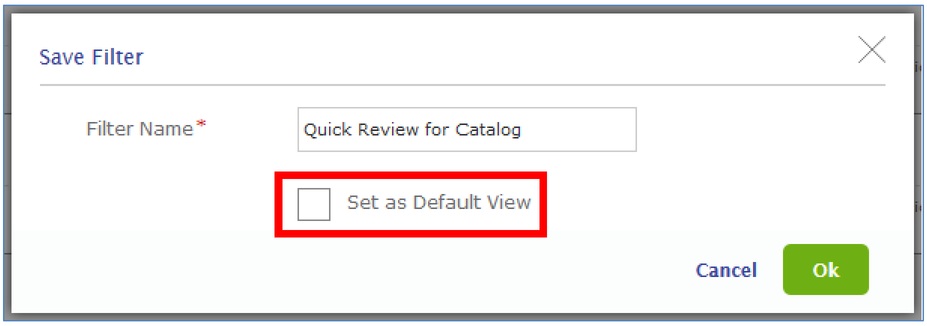
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

To mark filter as favorite,

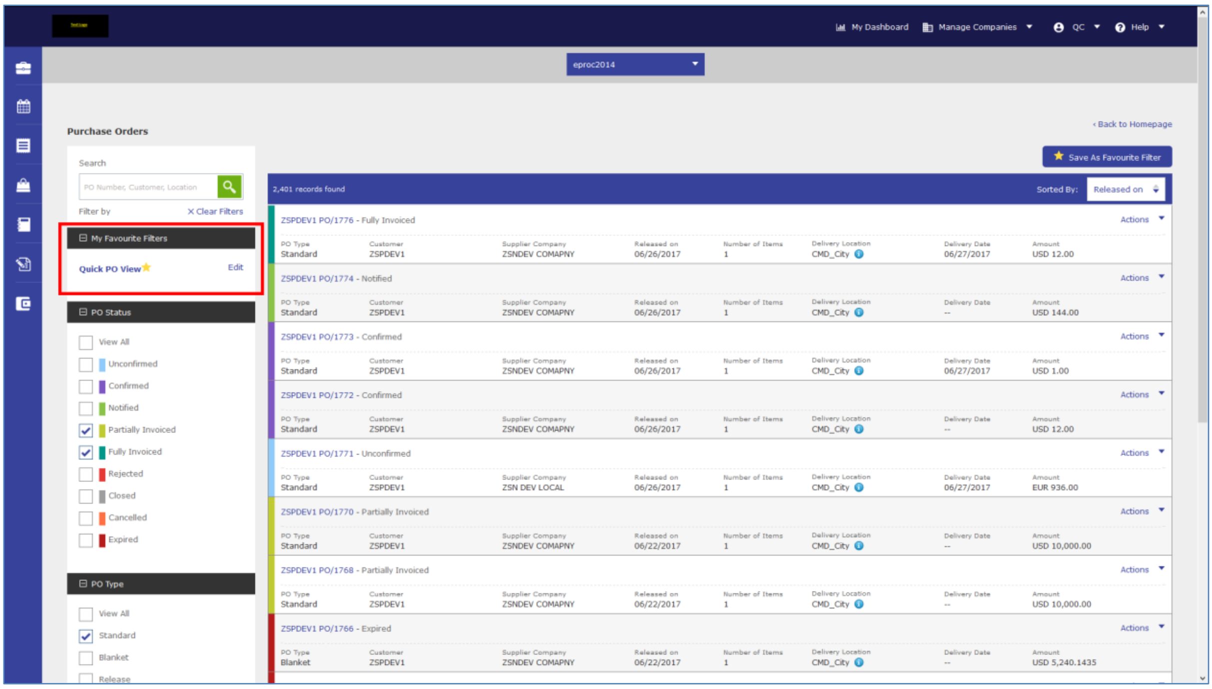
1. Select the filter parameters from the left panel and click the **Save as Favorite Filter** button as shown in the image below:



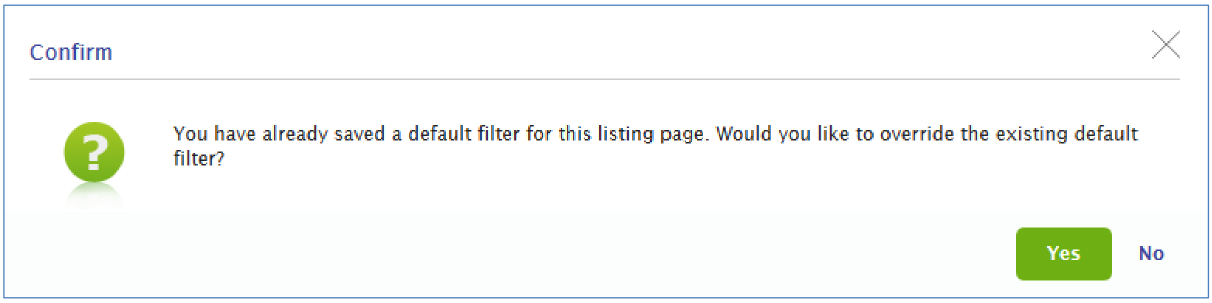
2. Once you choose to save a filter, you will have to name it as shown below:



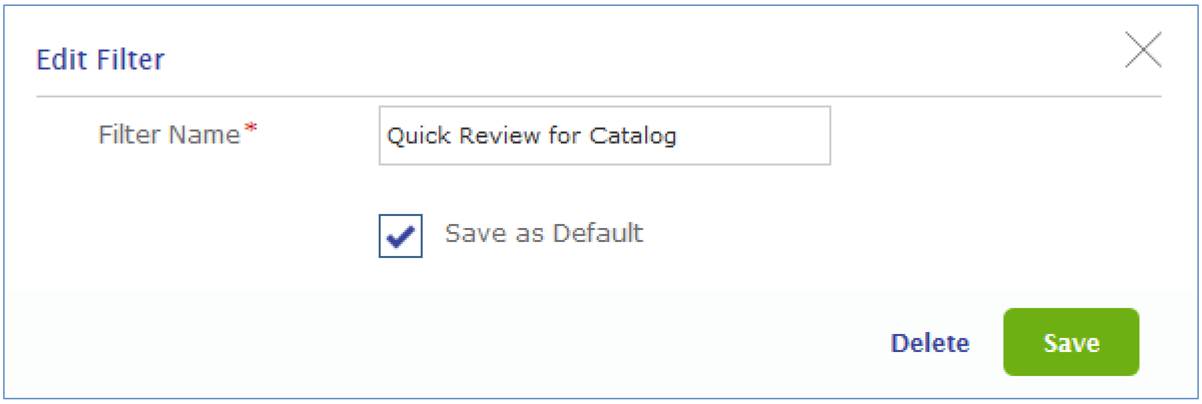

3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.
4. Saved filters will be available in the left panel of the listing page as shown below:




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.

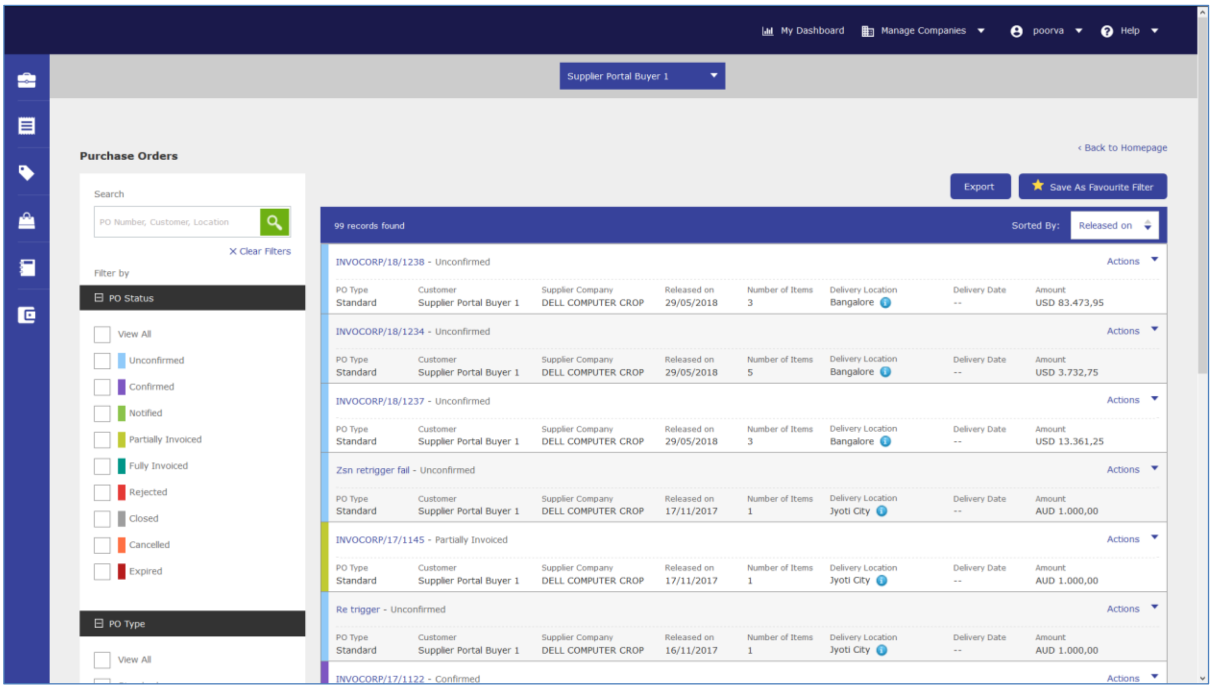



8. Uncheck the box against **Save as Default** and click **Save**.
9. If you wish to delete a filter, click **Delete** in the popup shown above.

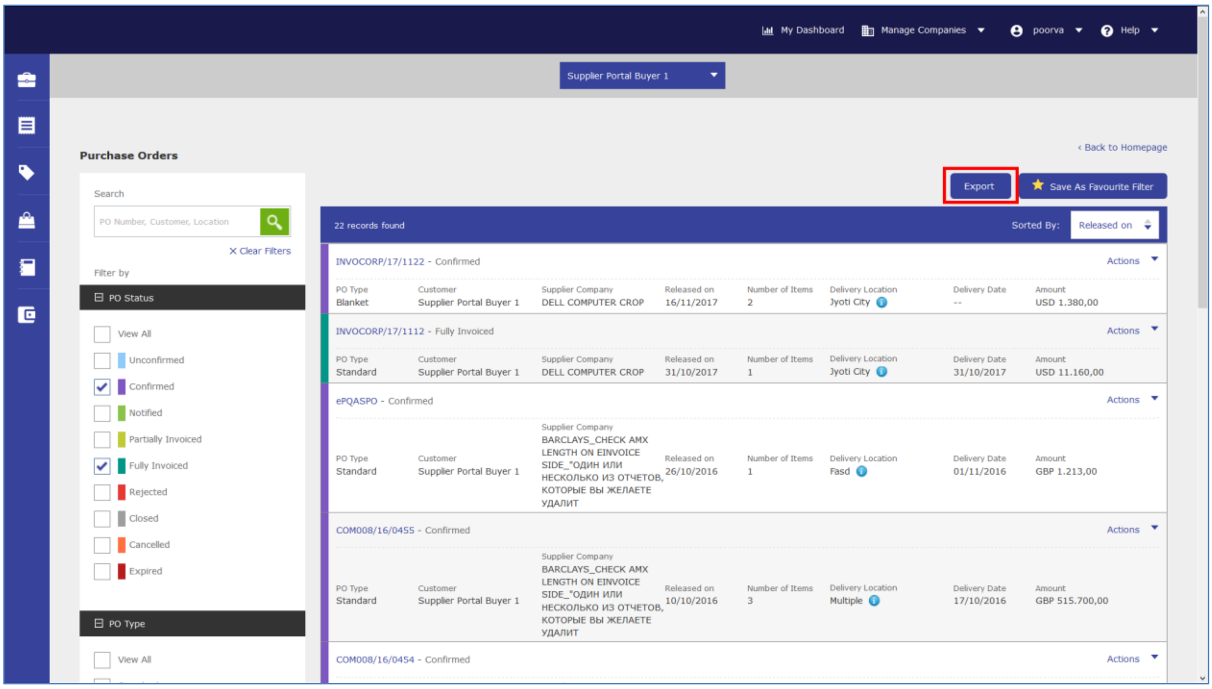
### 6.8.5 Exporting PO Details

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:

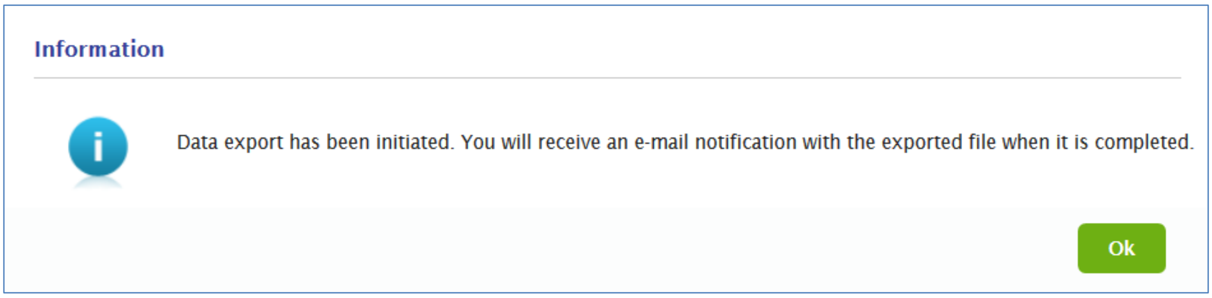
1. Navigate to PO listing page from **Side Panel** > **My Orders** > **View PO** > *Customer Name*. You will land on the following page:



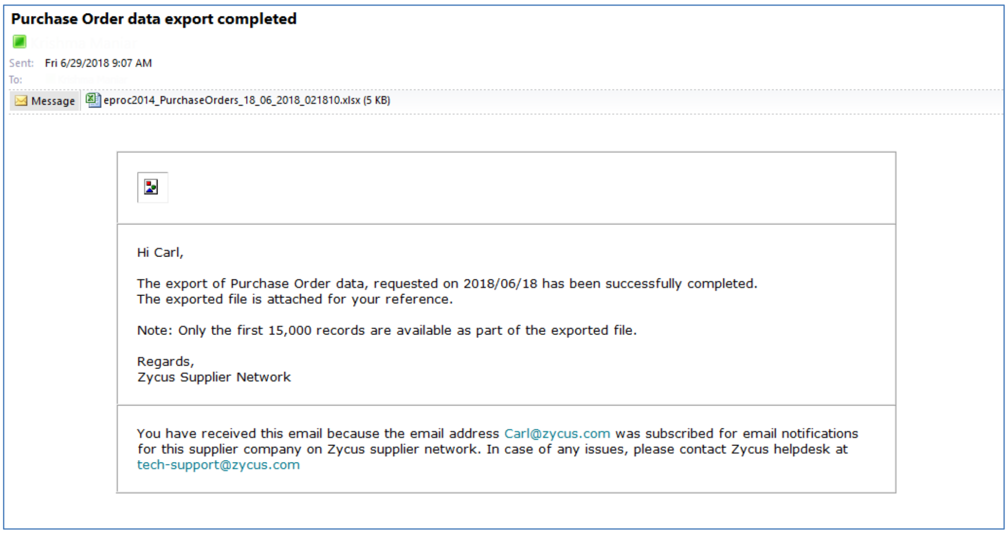
2. To export the PO details, click **Export** as highlighted in the image below:



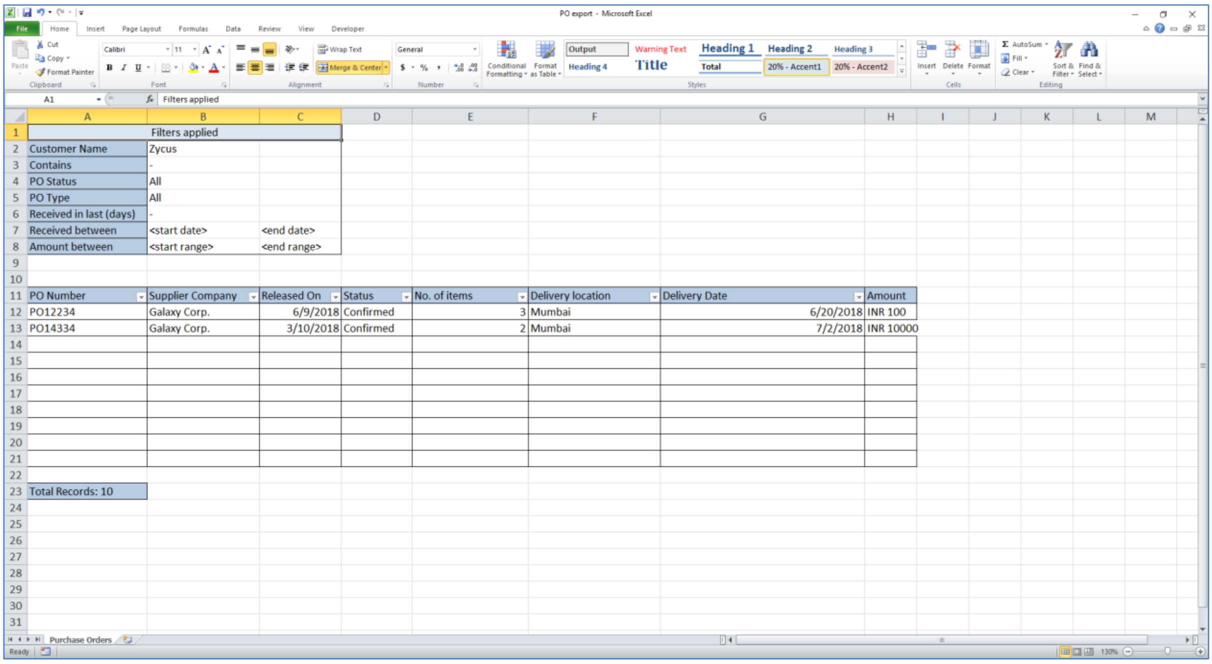
3. Clicking **Export**, you will see the following popup which will notify you that data export is in progress and you will be notified through an email once the file export is complete. Click **Ok**.




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 PO details:



| Filters applied | | |
|---|---|---|
| Customer Name | Zycus | |
| Contains | - | |
| PO Status | All | |
| PO Type | All | |
| Received in last (days) | - | |
| Received between | <start date> | <end date> |
| Amount between | <start range> | <end range> |

| PO Number | Supplier Company | Released On | Status | No. of items | Delivery location | Delivery Date | Amount |
|---|---|---|---|---|---|---|---|
| PO12234 | Galaxy Corp. | 6/9/2018 | Confirmed | 3 | Mumbai | 6/20/2018 | INR 100 |
| PO14334 | Galaxy Corp. | 3/10/2018 | Confirmed | 2 | Mumbai | 7/2/2018 | INR 10000 |

Total Records: 10

**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

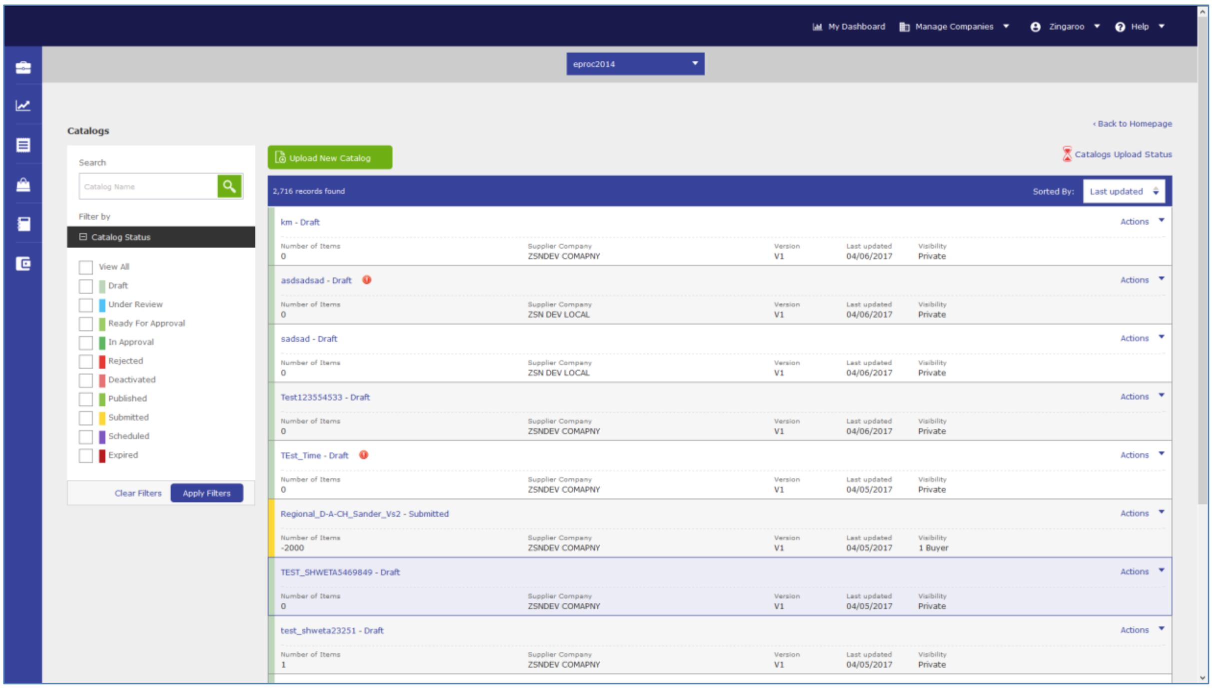
***NOTE:*** *The above-mentioned menu may or may not be available based on the access provided to you by customer.*

*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:

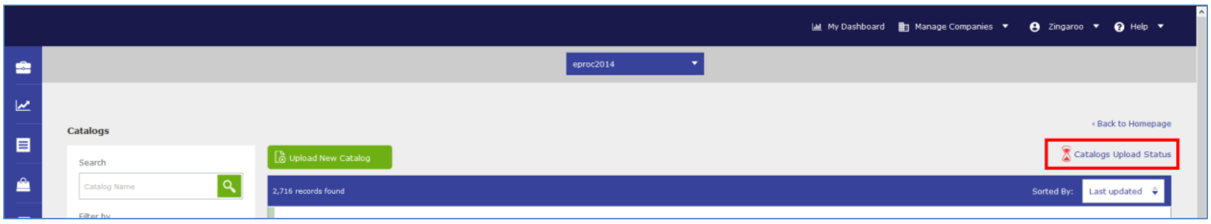



***NOTE:*** *When a catalog is first uploaded by the customer or created by supplier, the version will be V1 by default.*

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

<u>Note:</u> **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**

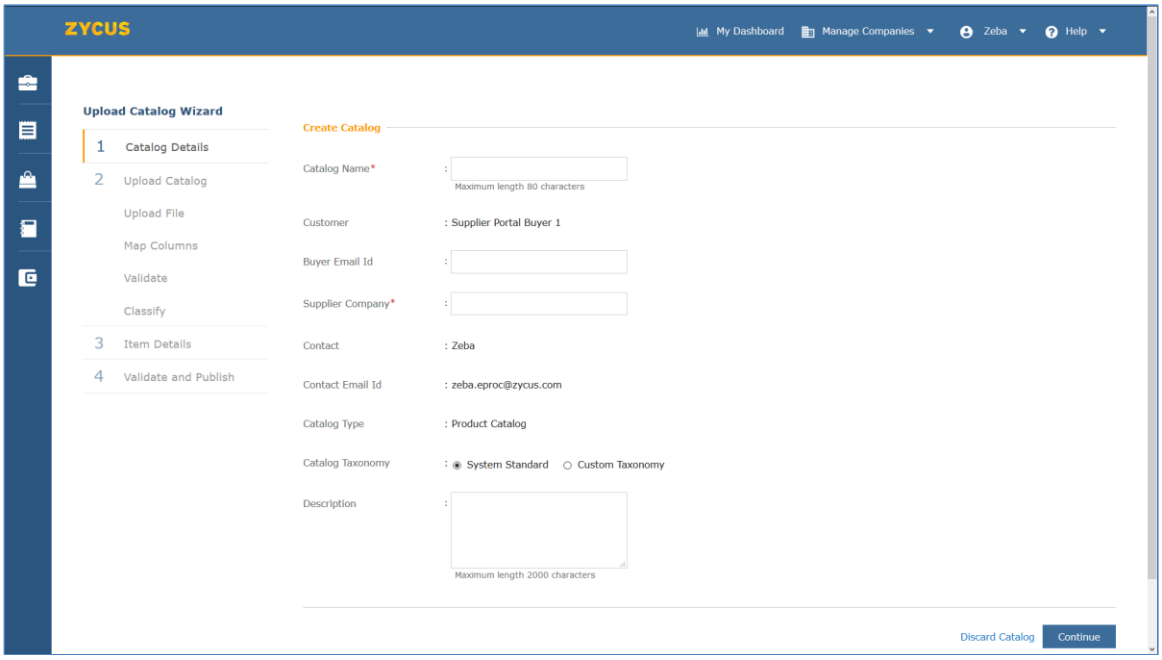
a. **Online Creation**
b. **Offline Upload** (***CSV***, ***CIF 3.0***, ***cXML***, ***Excel, ZIP***)
   i. **Upload File**
   ii. **Map Columns**
   iii. **Validate**
   iv. **Classify**

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.**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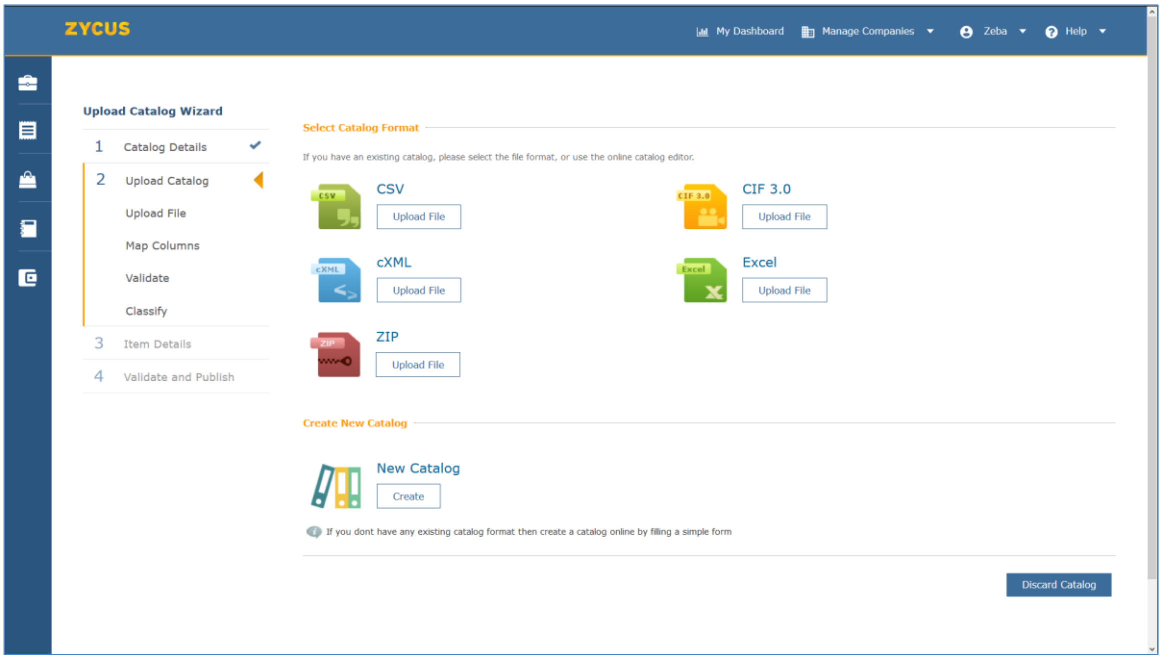
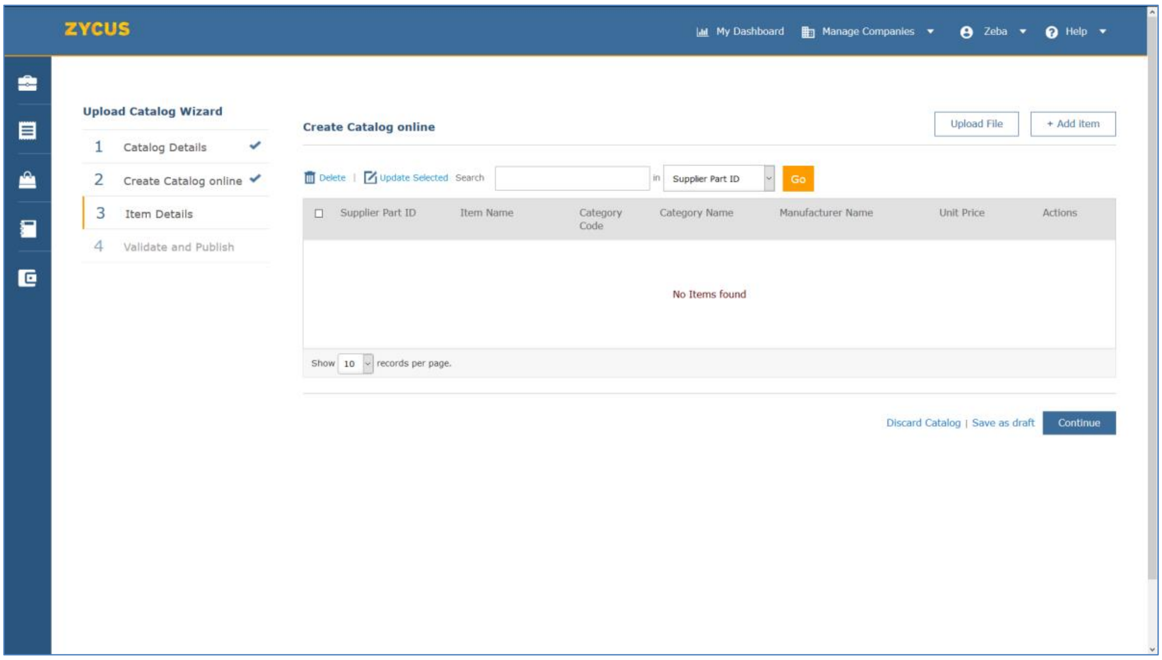
***Step 2: Upload Catalog***

Select the required Catalog format for upload **OR** click Create under **Create New Catalog**. Refer the following screenshot:

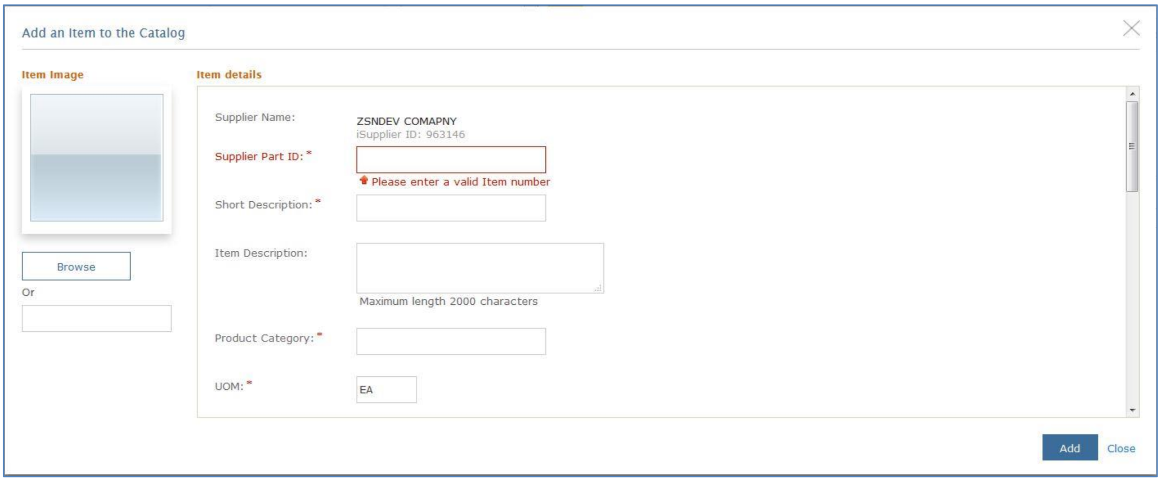



## Online Creation

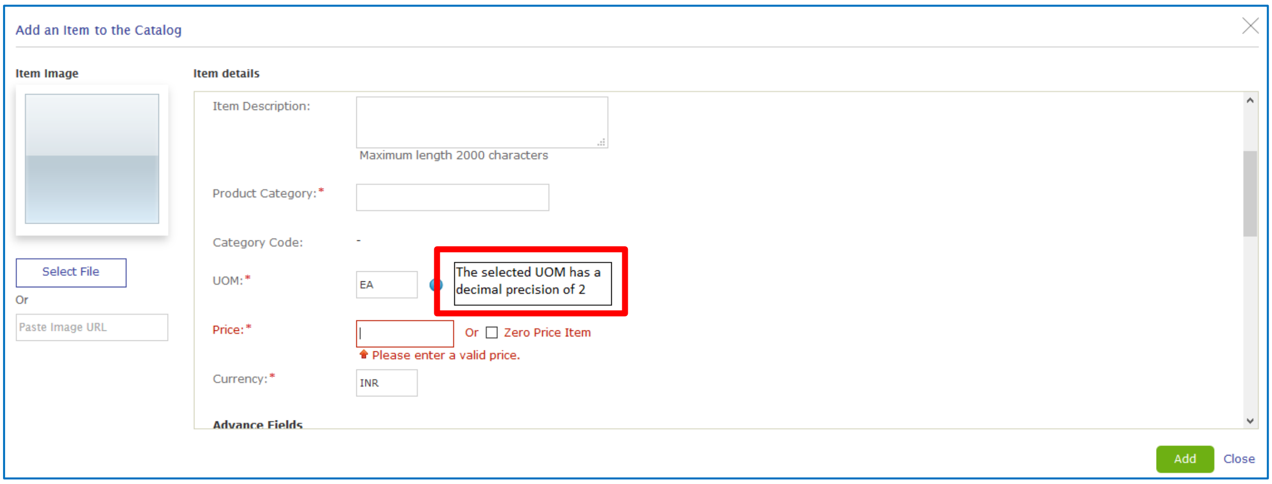
1. On the **Step 2** page, click on the **Create** button under **Create New Catalog**. This will redirect you to the following page:



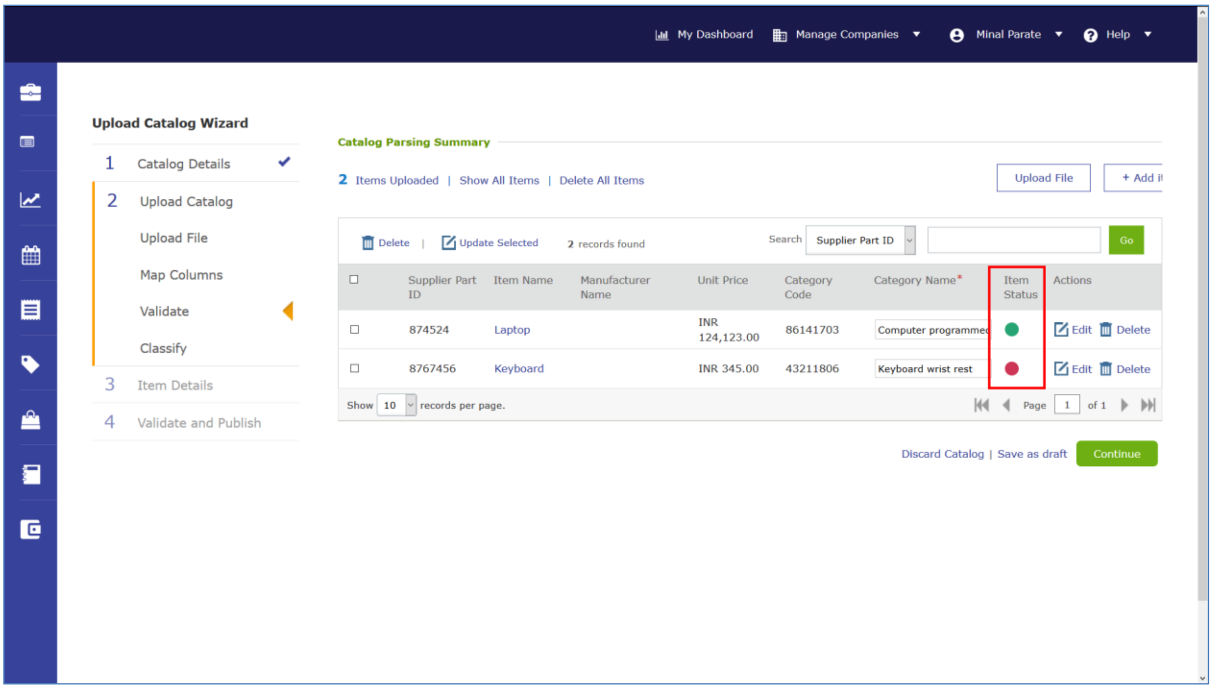

2. Click **+ Add new item** to add items to the Catalog.



***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:

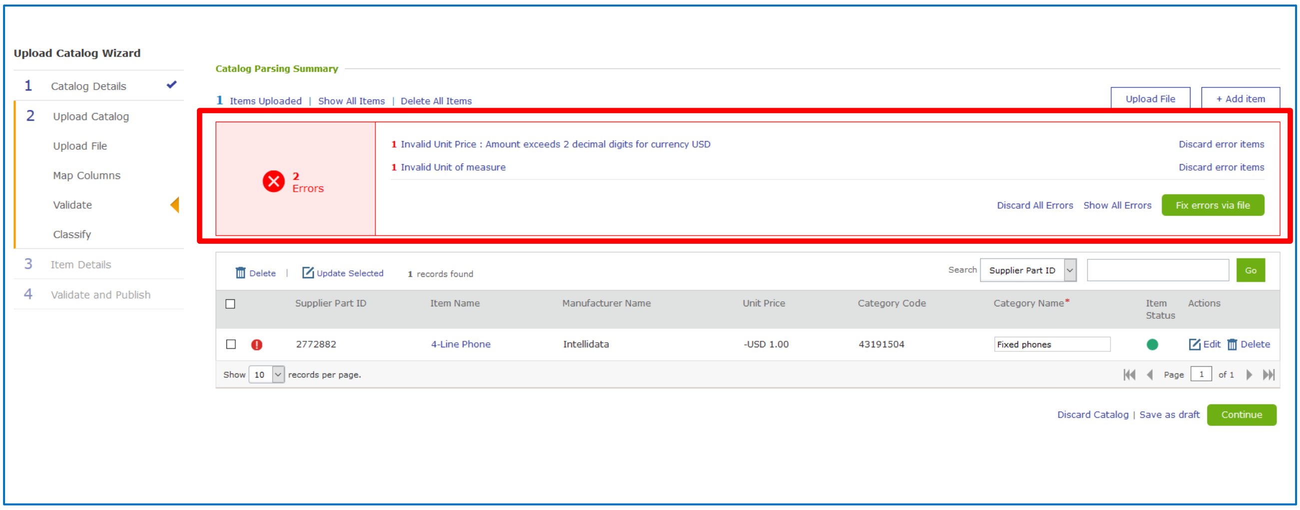



3. Enter all the required information about the item to be added in the Catalog such as:
    - Supplier Part ID
    - Short Description
    - Product Category
    - UOM
    - Price
    - Currency
4. You can also choose to **De-activate** an item if required.
5. Select the Item Image by clicking **Select 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:

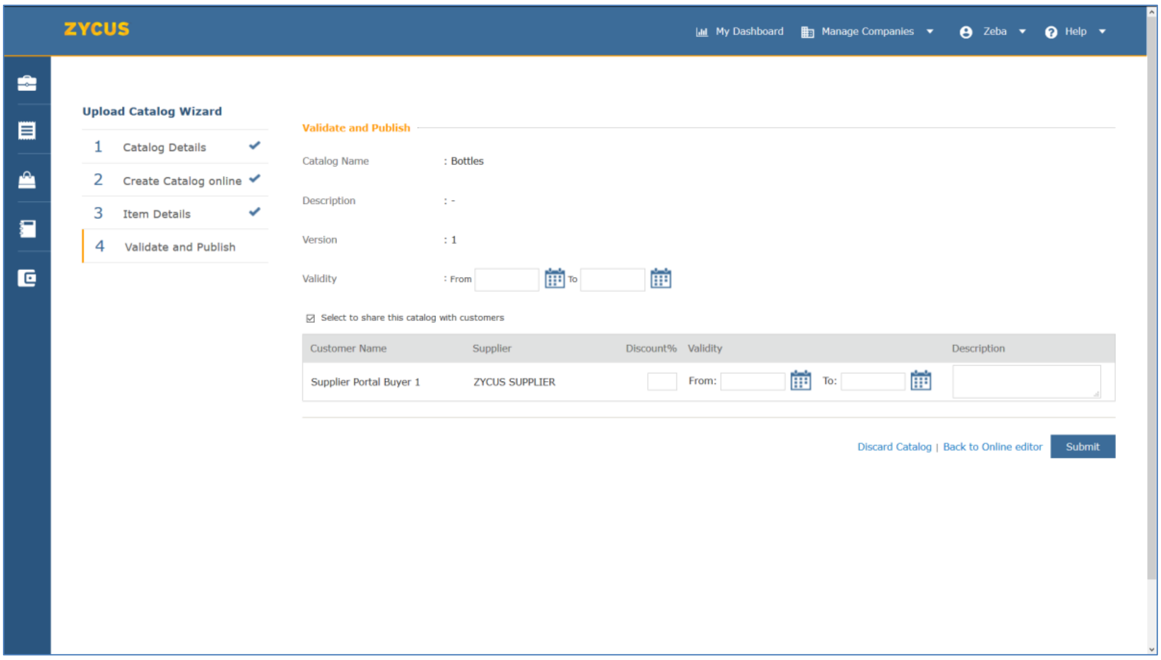



**Note:** Highlighted section shows the status of items of whether they are active or inactive.

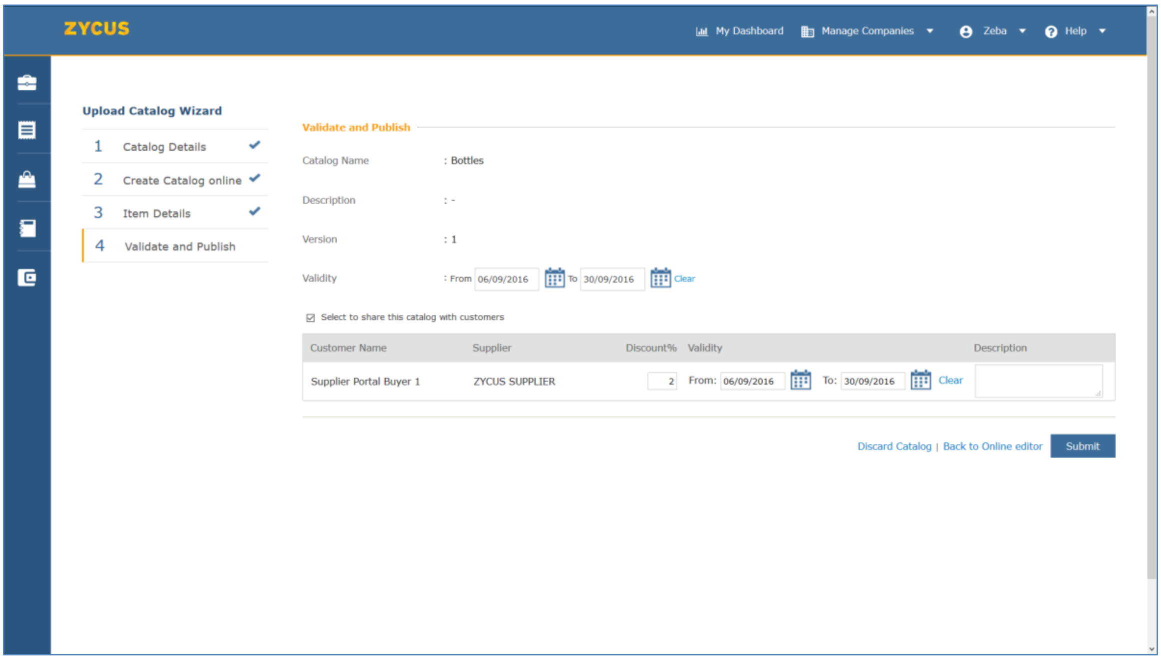
**Note**: If Decimal Precision is not followed for items uploaded in the catalog, ZSN will display an error as shown below:



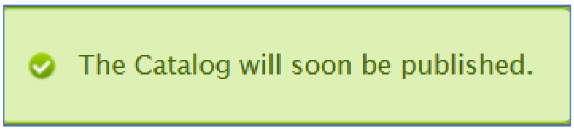

8. Click **Continue** to proceed to **Step 4: Validate & Publish.** Following page will be displayed:




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.



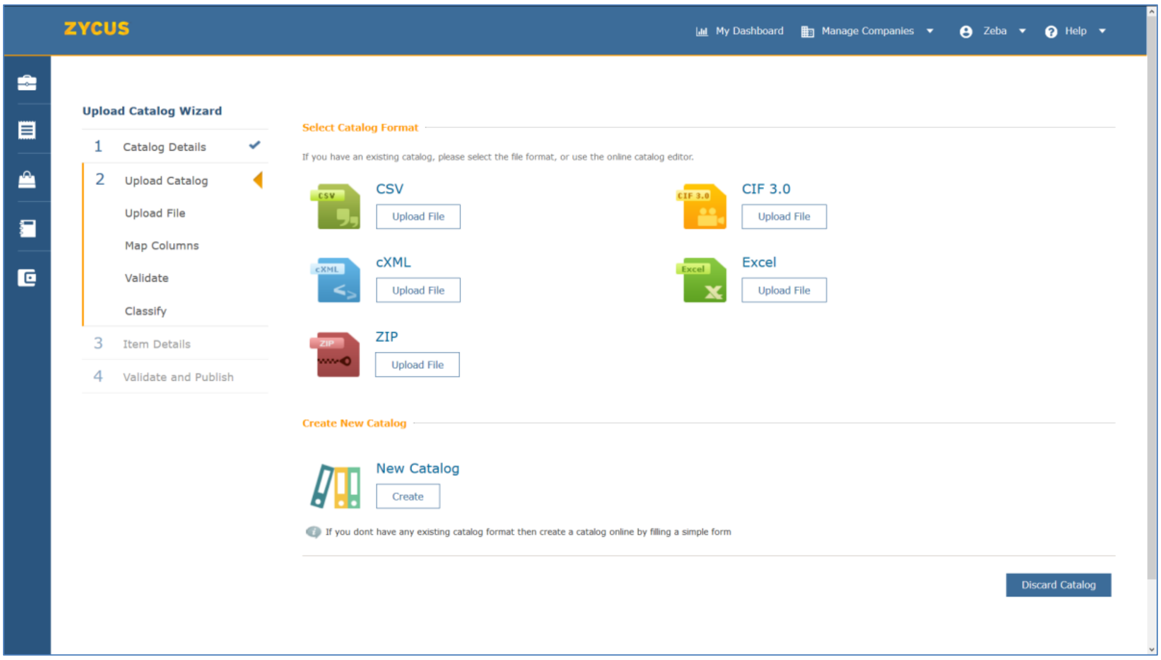

11. For the selected customer, **Customer Name** will be auto-populated. You can enter the **Discount** you want to offer to the company. You can also mention the **Validity** of the catalog for the customer.
12. Click **Submit**. You will get following popup:



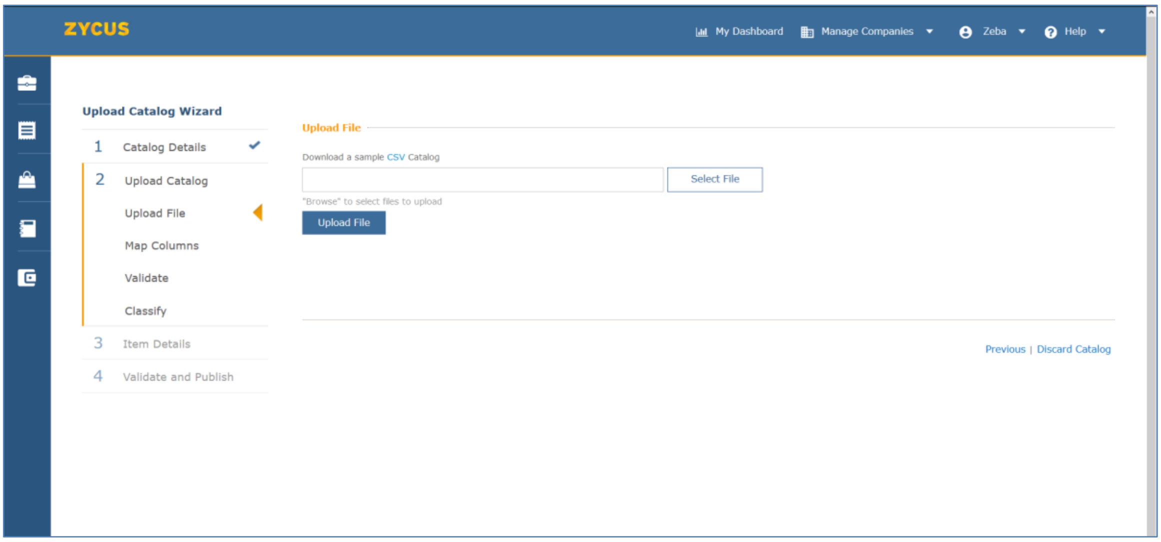
13. Your catalog will be displayed in catalog listing page.

## 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.

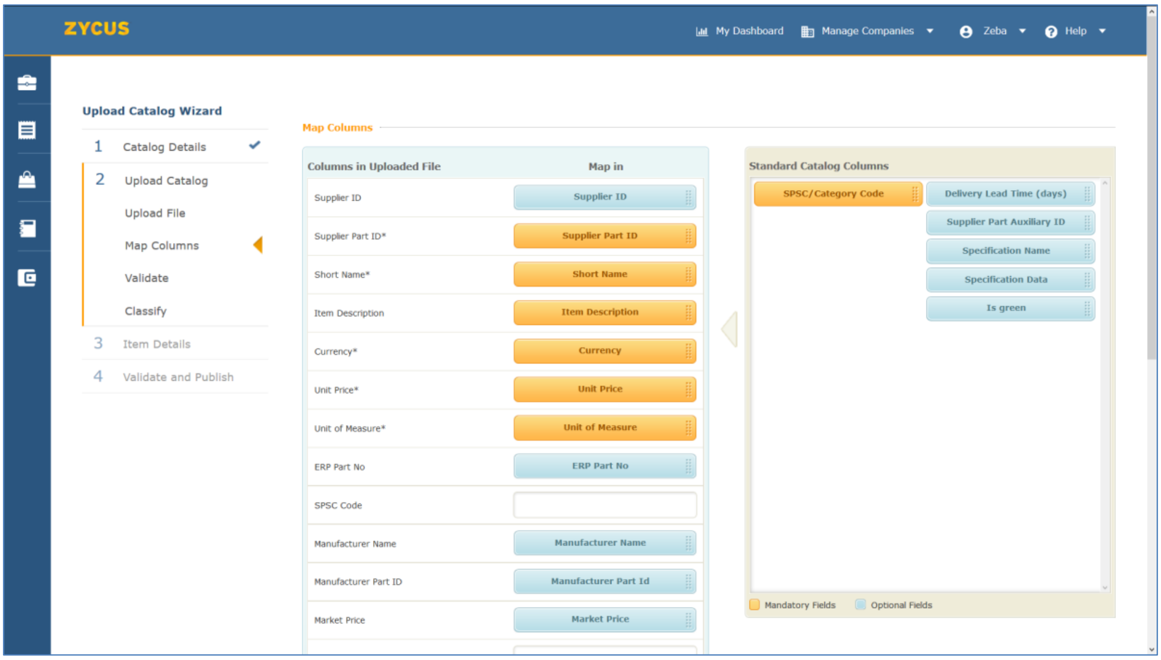
***NOTE:*** You can download the sample template for **ZIP** file on you system for reference.

***NOTE:*** Validations will be in place when supplier enters any currency, UOM, location or address that are no longer supported by the buyer.

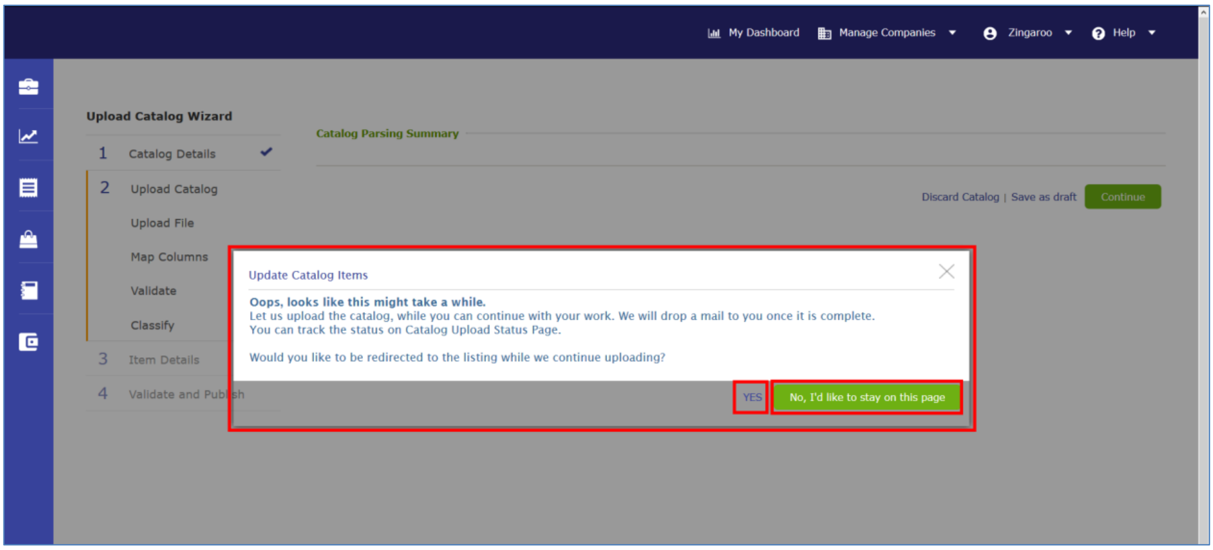
***NOTE***: Catalogs uploaded using all bulk upload methods will be validated for Decimal Precision against UOM and Item Price as per the currency selected for that item.

***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.

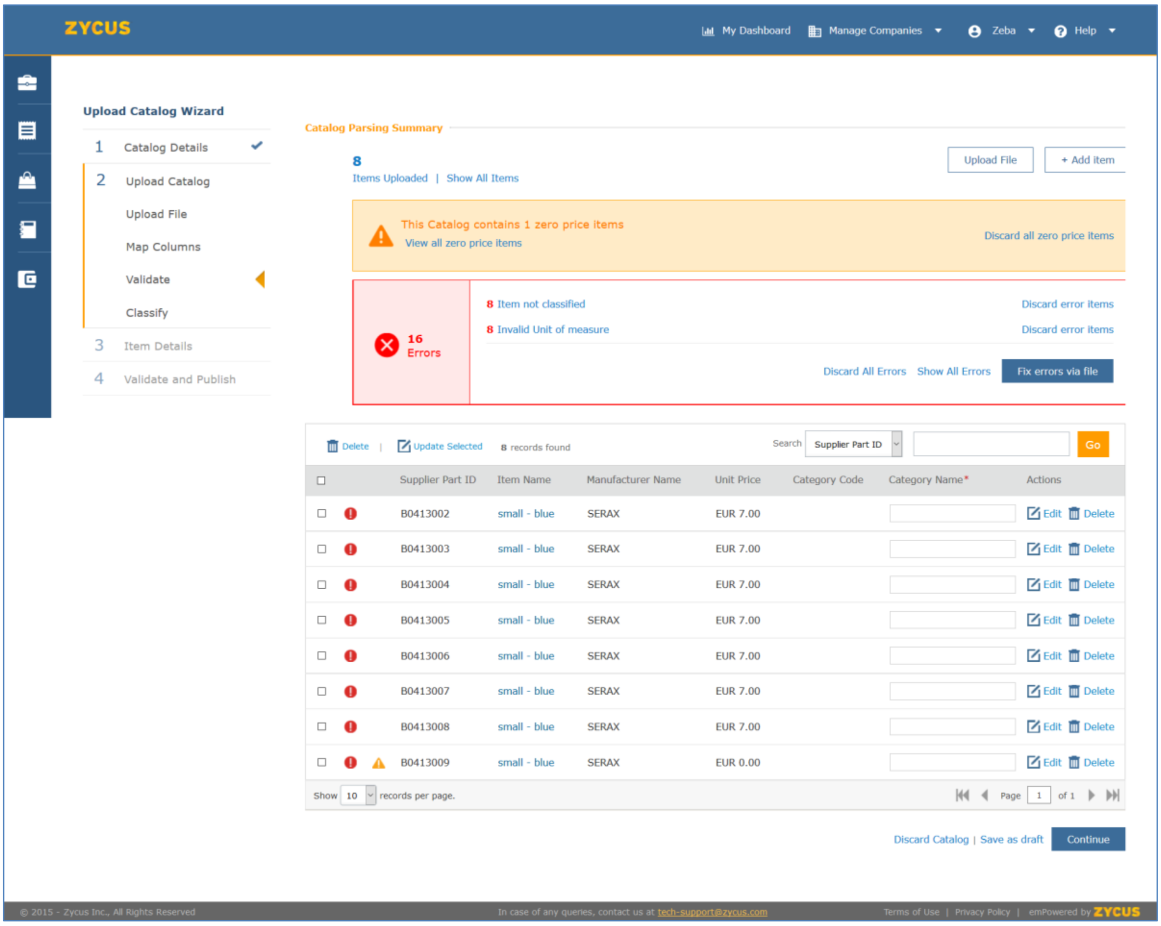
5. Click **Upload File** button to upload selected catalog file & proceed to the **Map Columns** sub step.




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:



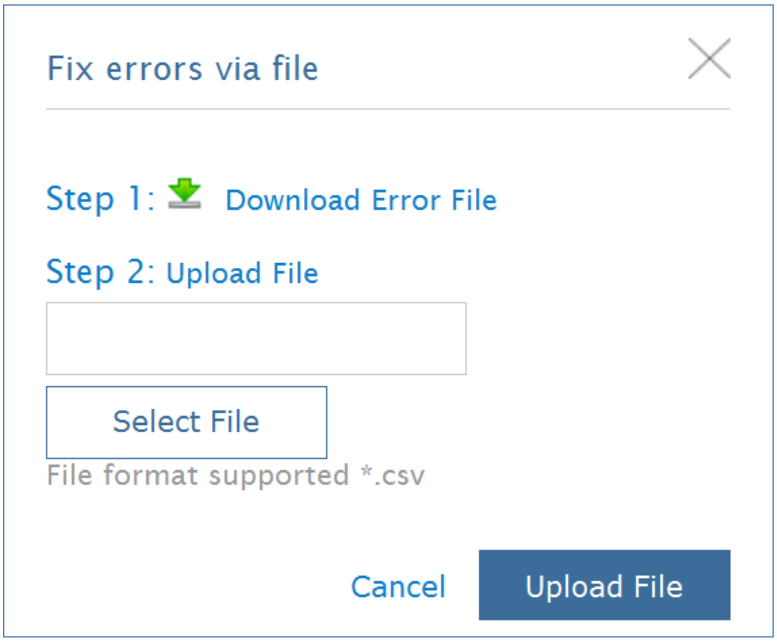

9. This message will notify that you have an option of letting the catalog upload in the background or you can stage on this same page until the catalog is uploaded.
   - To allow the upload in the background, click **Yes**
   - To wait for the catalog to upload, click **No, I'd like to stay on this 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:




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: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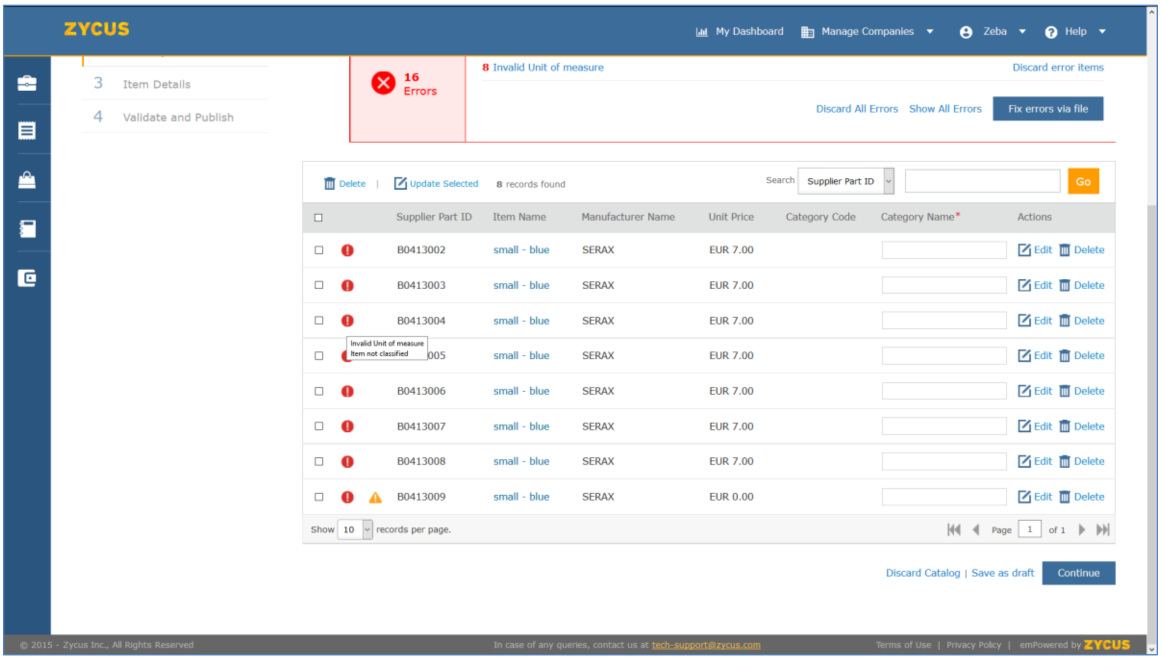
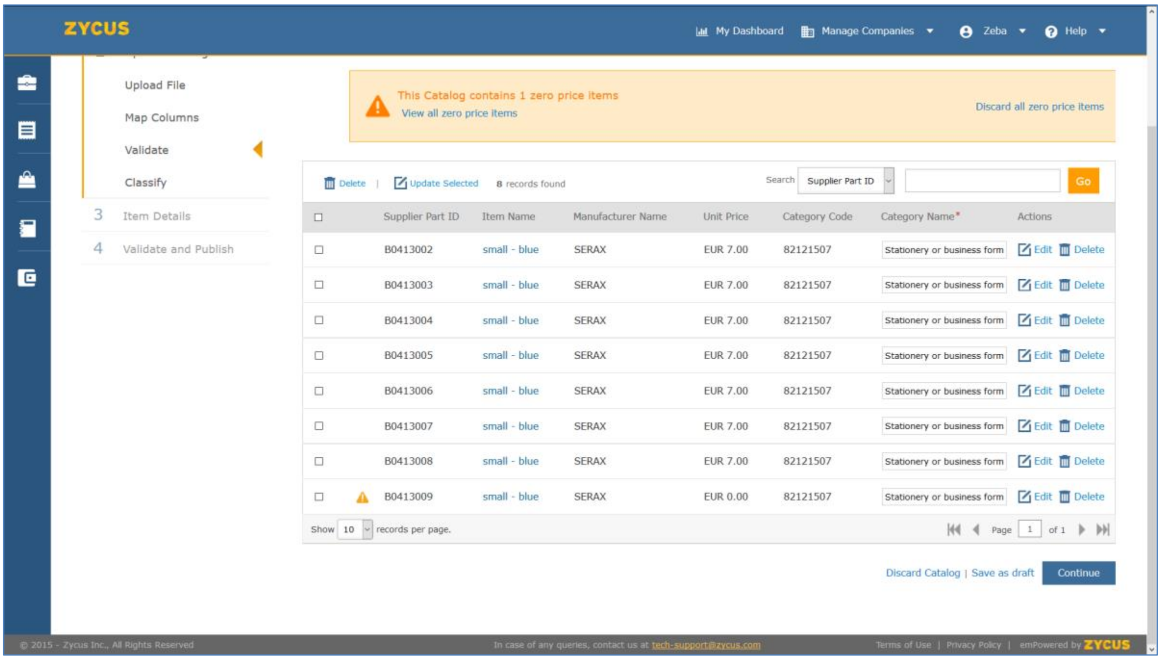



2. Hover on error icon to view the error.
3. For example, if the item is not classified, you will have to manually classify the items.
4. When the errors will be corrected, you will notice that error icon will disappear.




5. Click **Continue** to conclude the **Validate** sub step and proceed to the **Classify** sub step.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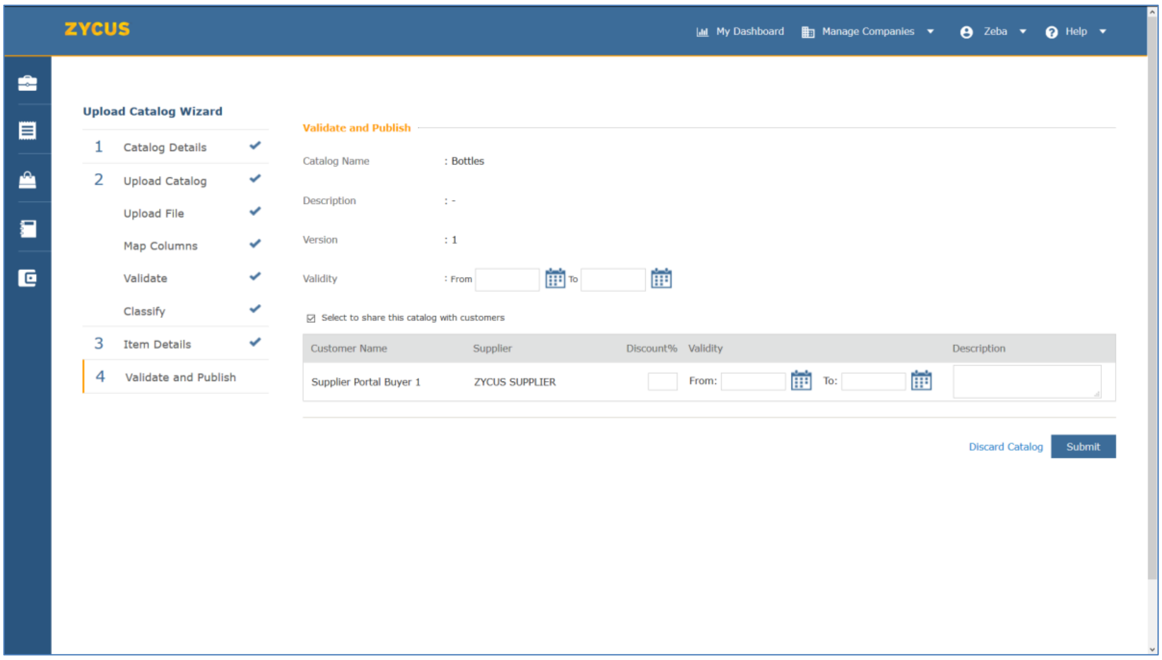
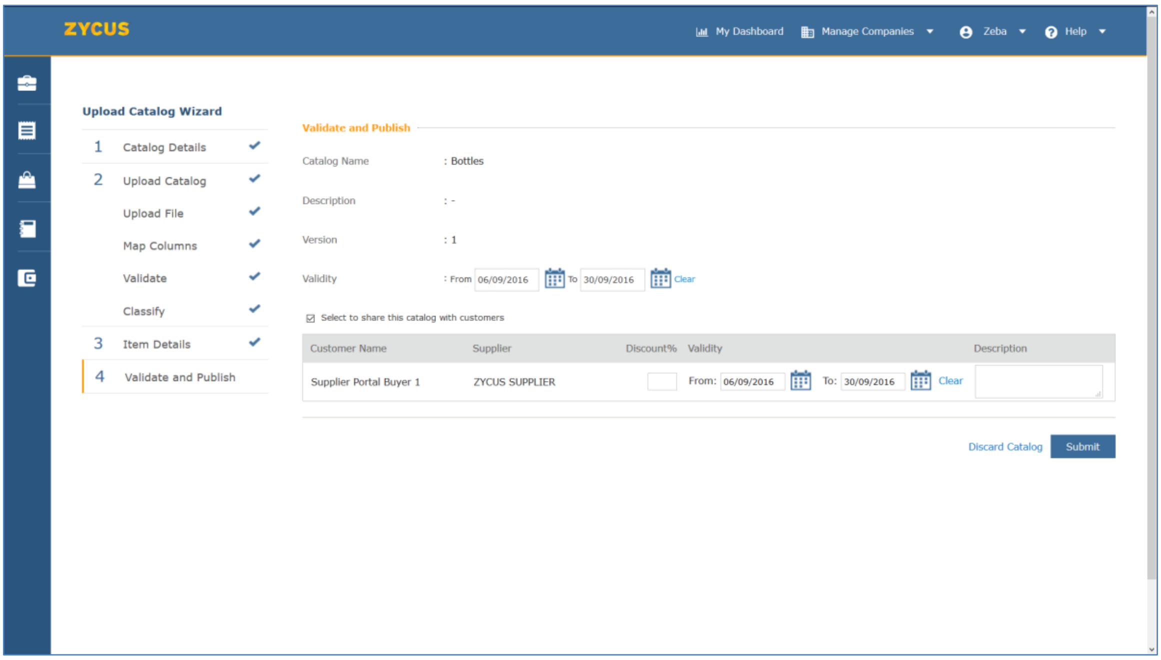



6. Click **Continue** to conclude the **Classify** sub step and proceed to **Step 4: Validate & Publish.**




***Step 3: Item Details** is not applicable in case of Offline Catalog File Upload.*

***Step 3: Item Details***

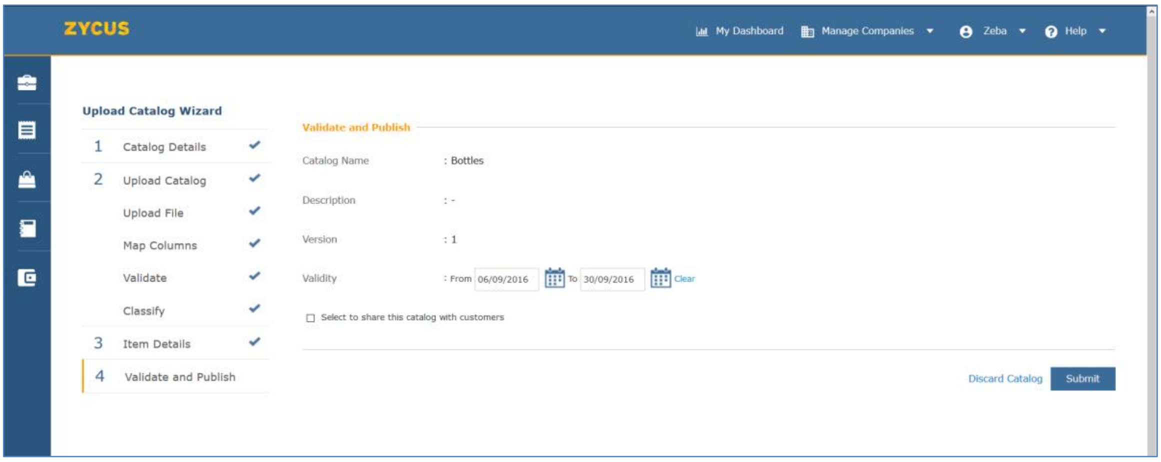
Refer to the

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***

1. Using the icon, select the time period for which the Catalog is valid.




2. 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.*

3. Enter the **Discount %**, **Description**, and select the **Validity** of the Catalog for each Customer.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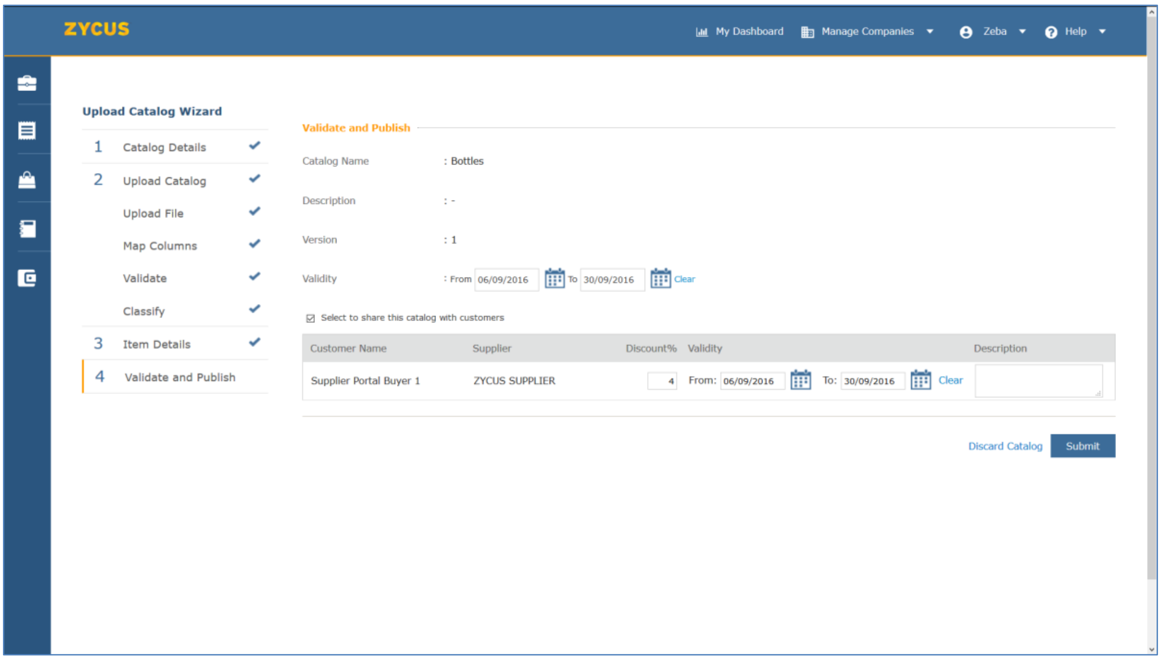



4. Click **Submit** to proceed and share the Catalog with the selected Customers.

### 6.9.2 <u>How to Edit a Catalog?</u>

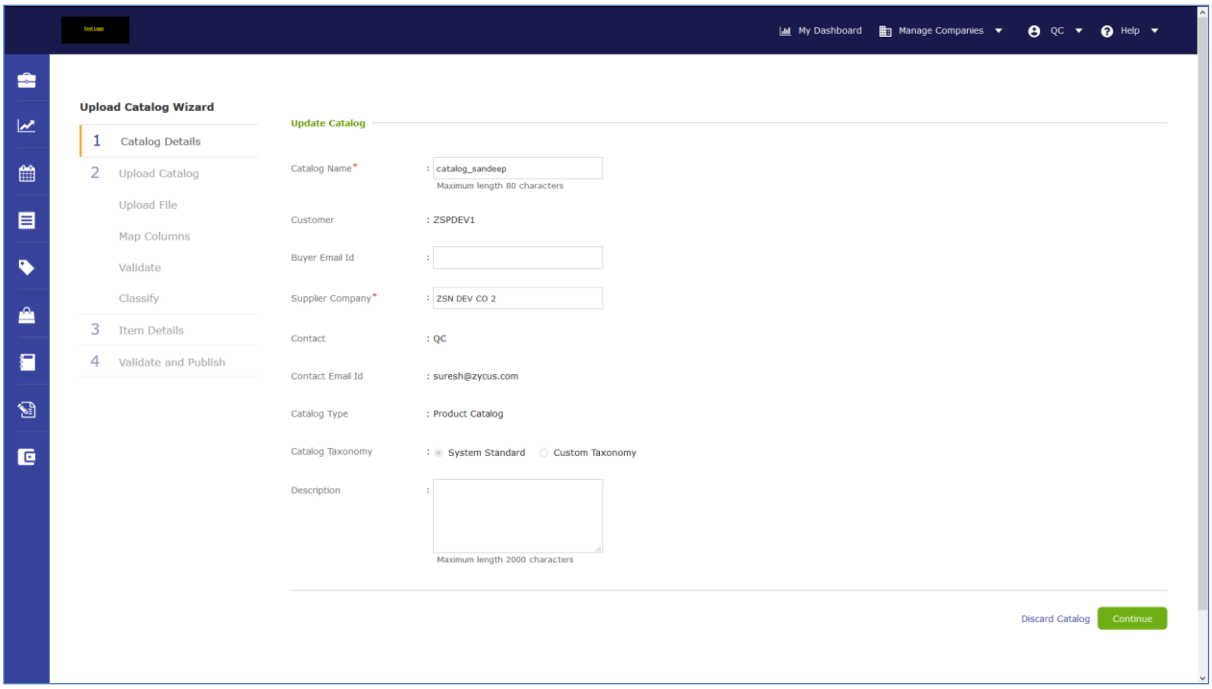
As a supplier, you can edit a published, rejected, deactivated or expired catalog.

**<u>To edit a Catalog:</u>**

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:




**Note:** You can change the Buyer Email ID, if required from this page.

5. Once you revisit the basic details for a catalog, you can go ahead with the next step of updating the line items.
6. 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.

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 following page.



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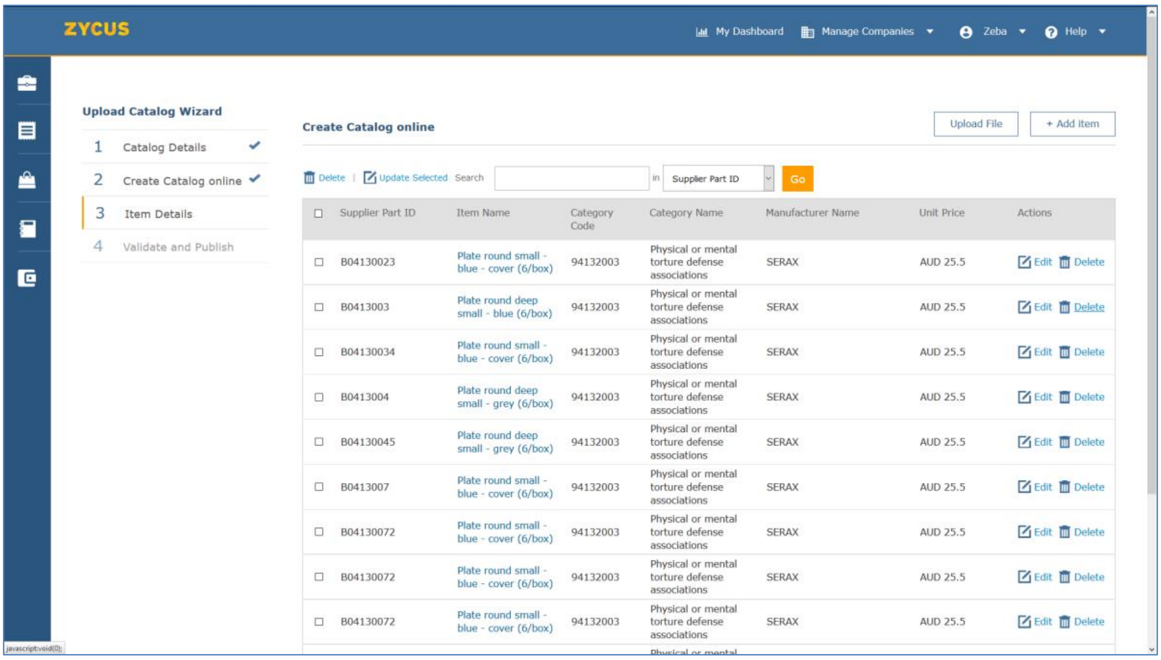
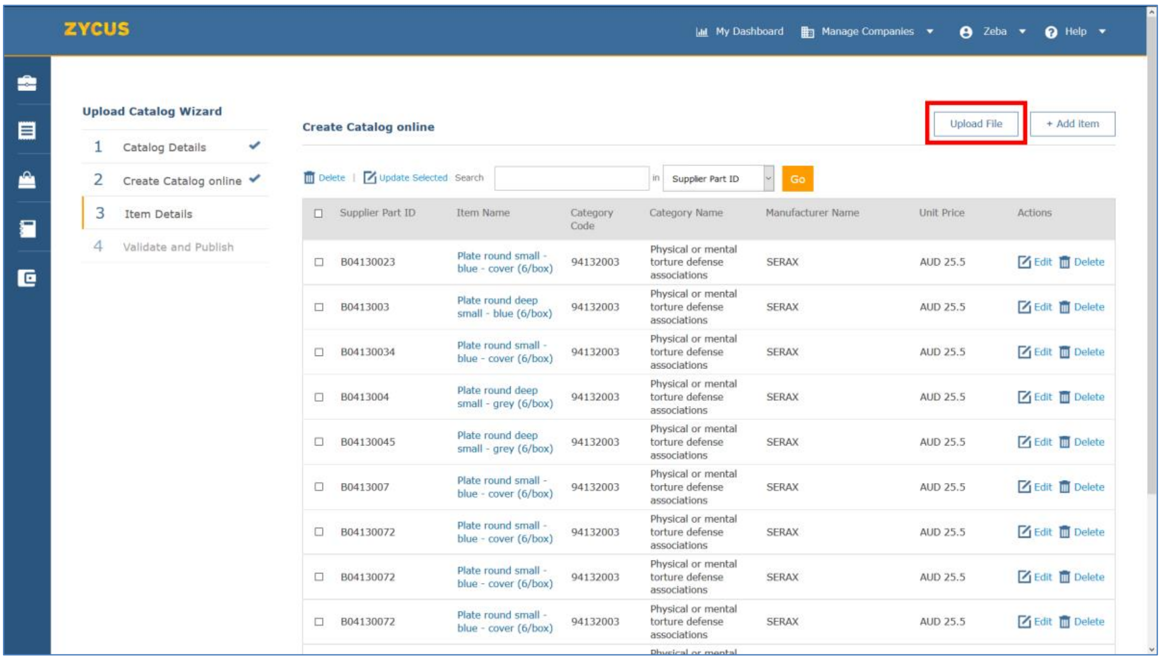


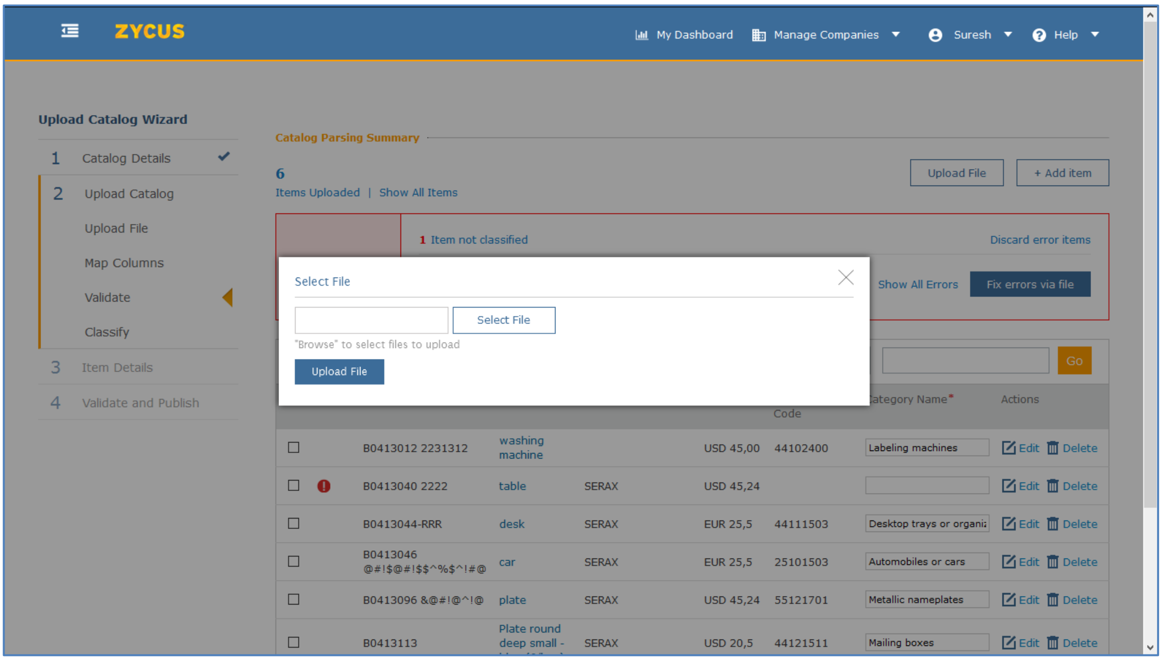

You can upload more items via file or you can add more items on the ZSN tool itself.

**To add more items via file**:

a. click **Upload File** as shown below:



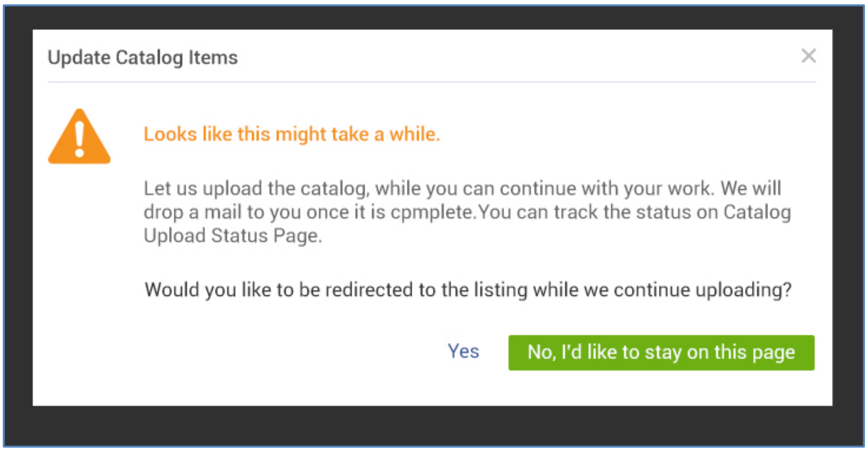

b. Click **Select File** to upload a file form your local system to upload.




**<u>Note:</u>** 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.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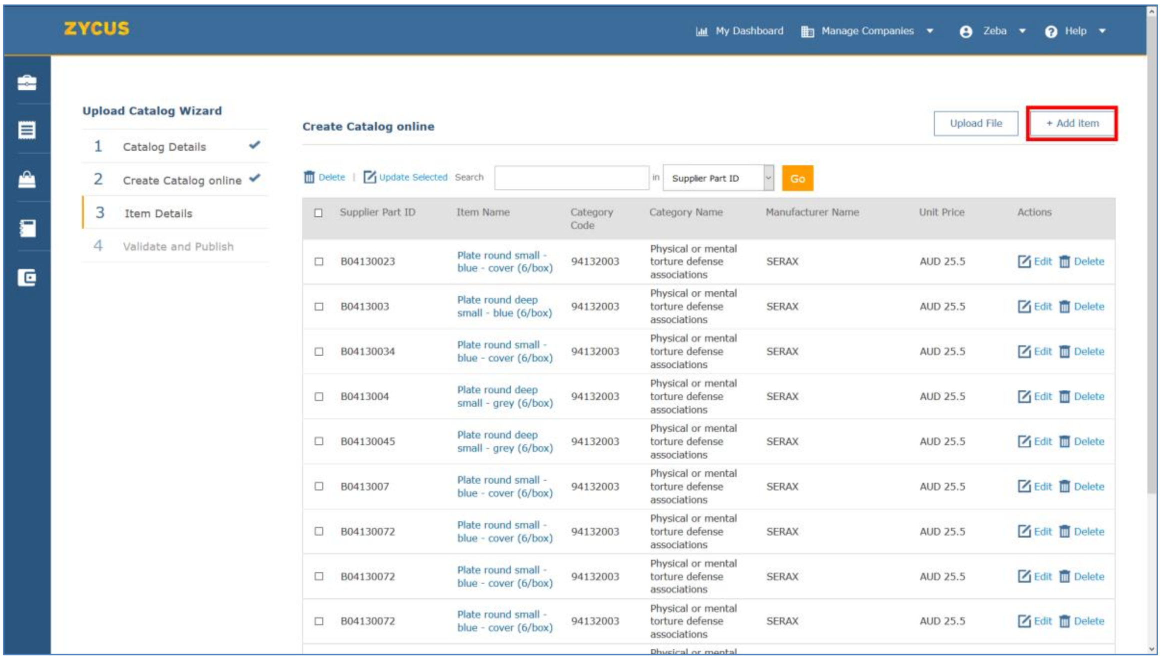
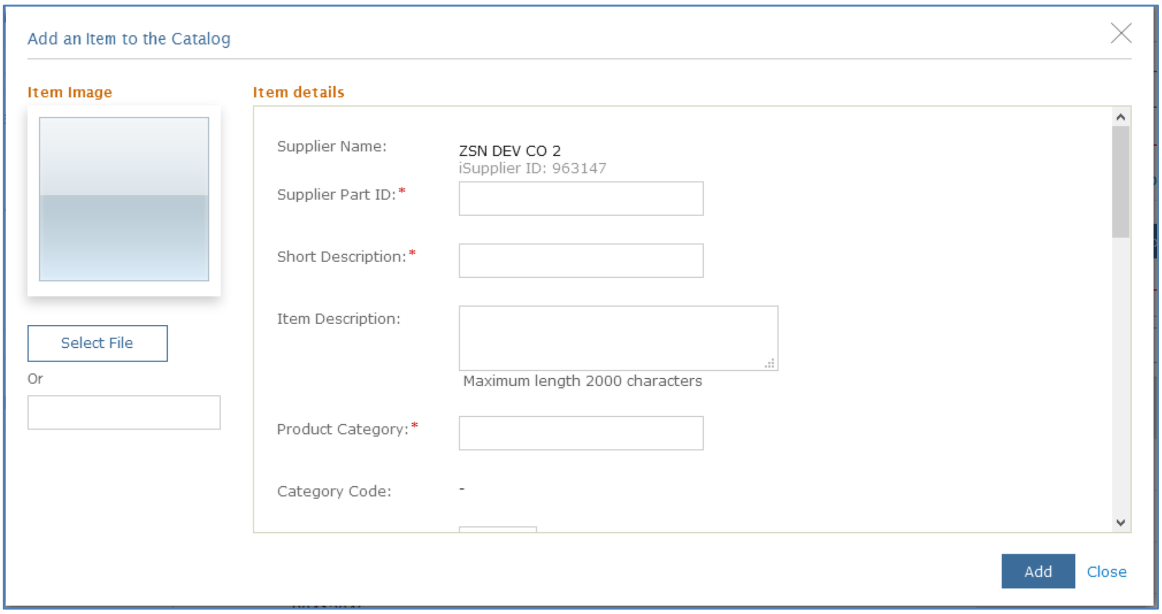
g. Once the catalog upload is complete, an email will be sent to the registered email address of the user who was uploading the catalog.

**To add Items on the ZSN tool:**

a. Click **Add Item** as shown below:




b. Following popup will be displayed:





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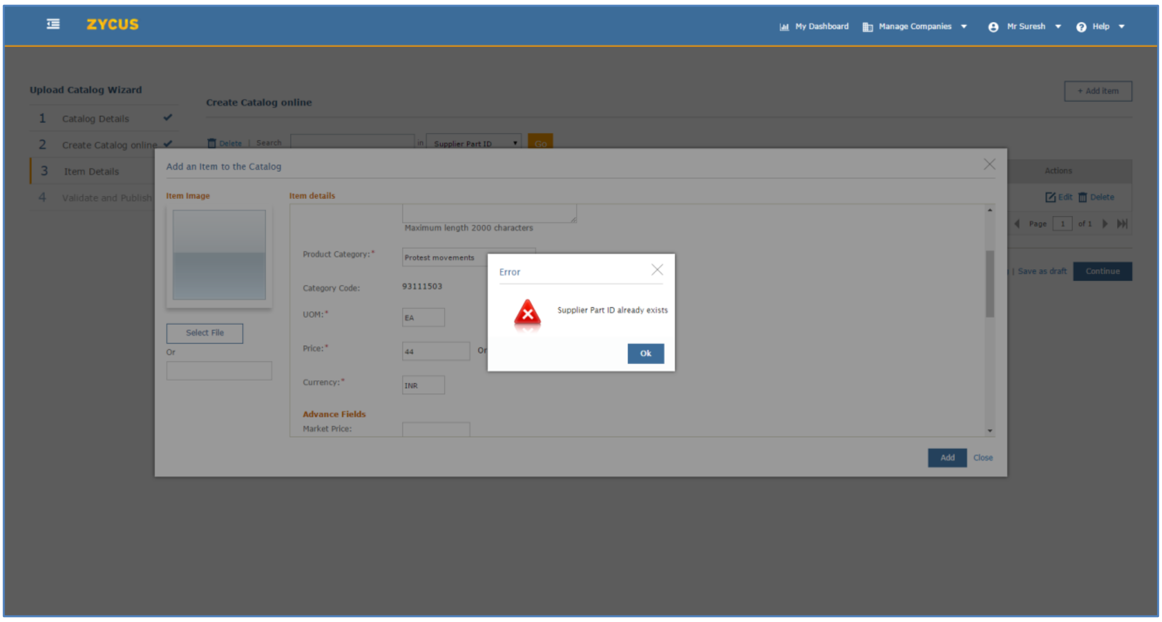
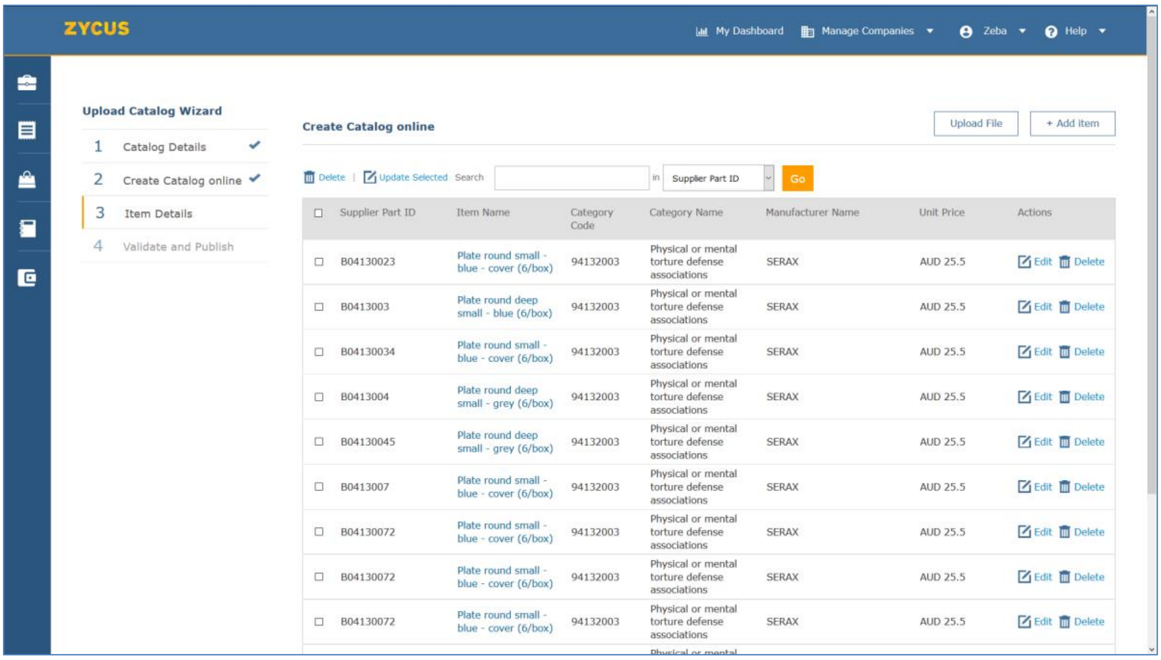
c. Enter the item details as requested. (*) marked are mandatory fields.

***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:

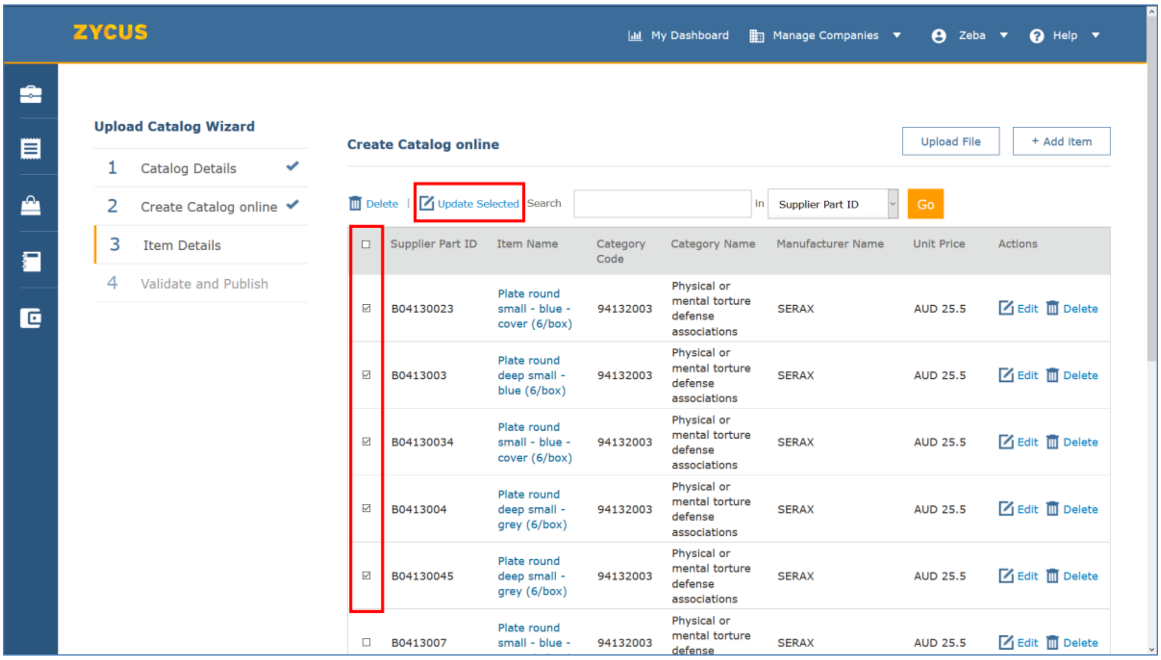



## 2. *How to Update Multiple Line Items?*

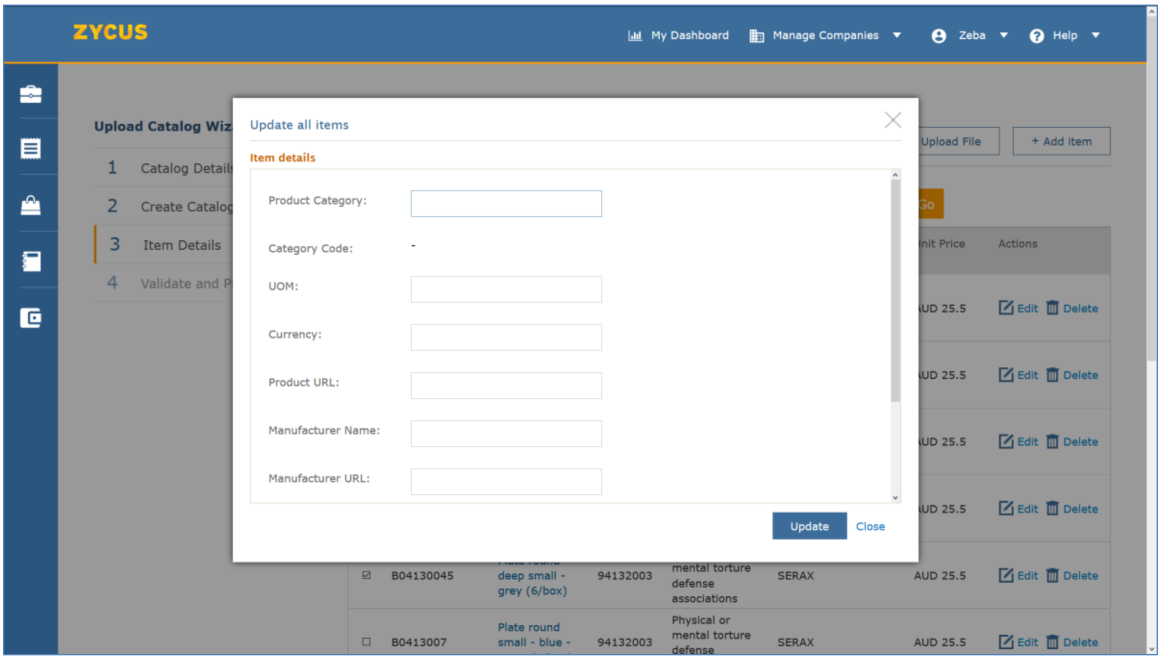
1. For a given catalog, from the Catalog listing page (**Side Panel > My Catalogs > View Catalogs > *Customer Name***), go to **Actions** drop-down menu and click **Edit**. You will be navigated to **Catalog Parsing Summary** section.



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:



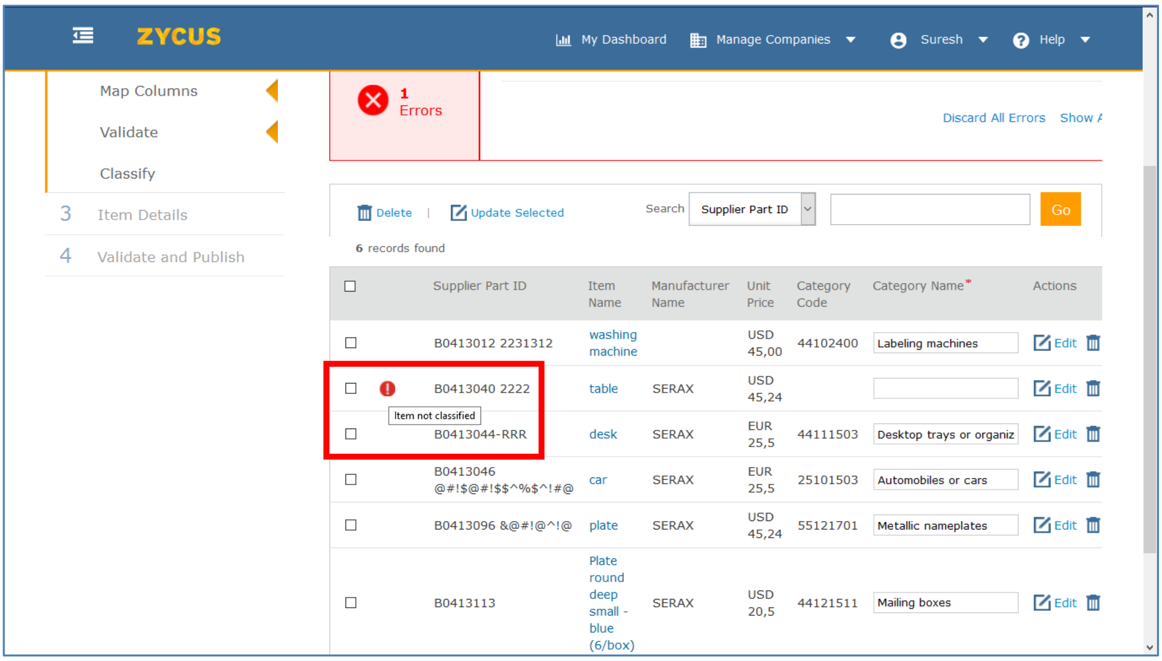

4. You will be able to update the standard item details such as **Product Category, Category Code, UOM, Currency, Product URL, Manufacturer Name, URL, Delivery Lead Time (days), Is green?,** and **De-activate Items?** Information.

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.

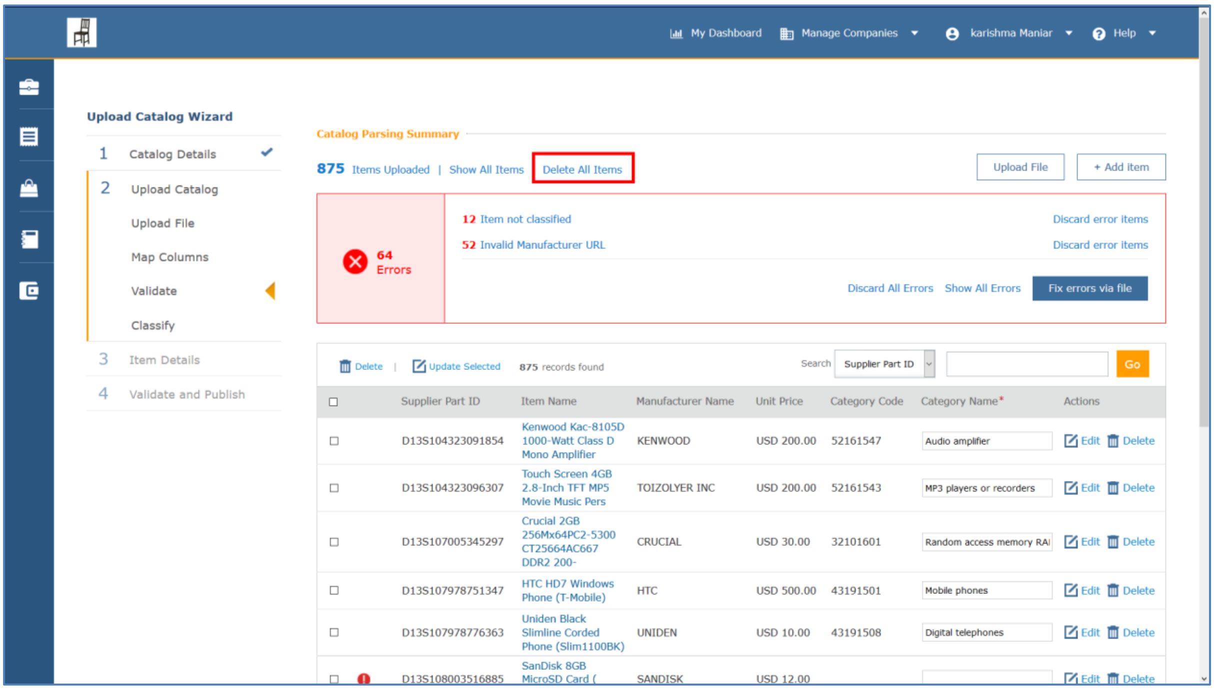



3. Add the missing information to update the line item. Click **Continue** to process the catalog forward.

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.

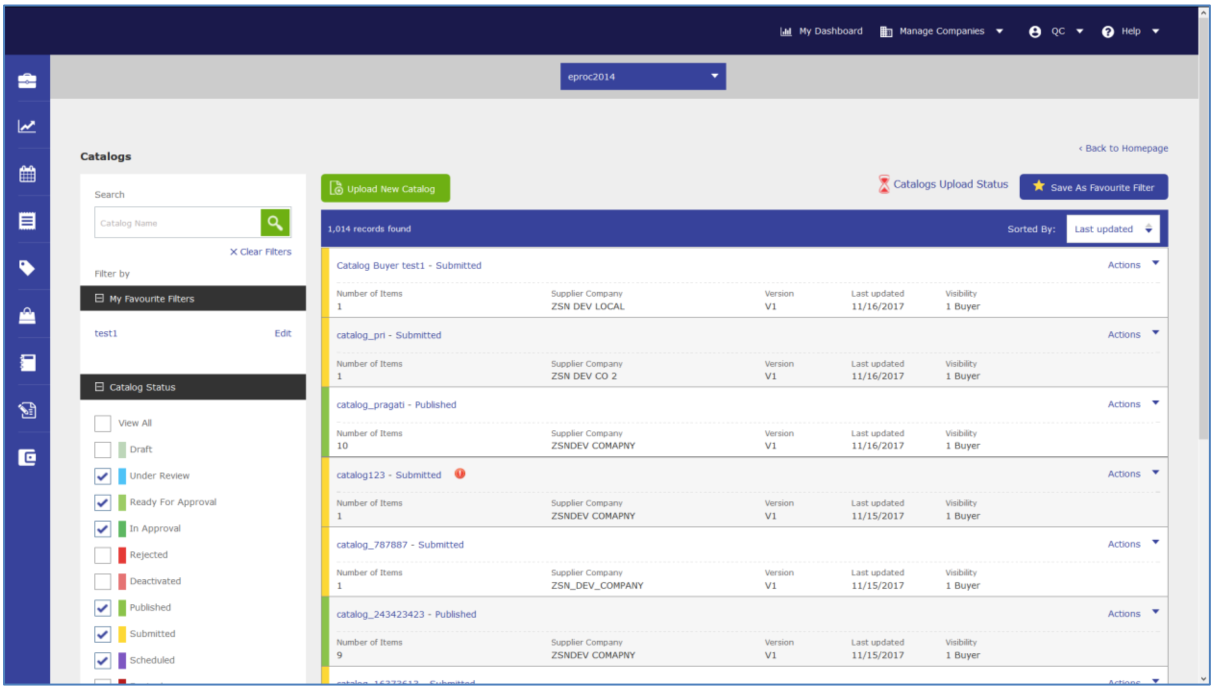
## 6.9.3 Cloning a Catalog

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.

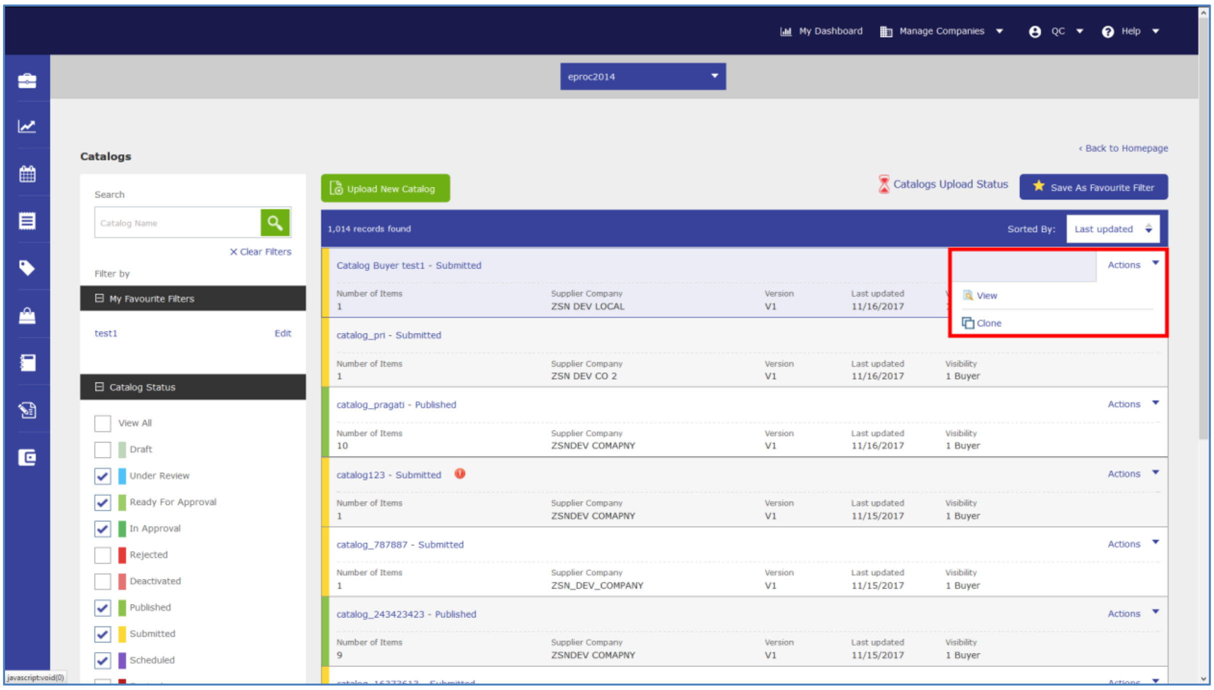
**Note:** All catalogs (except those in Draft state) can be cloned.

Let's take a look at this in action. To clone a contract:

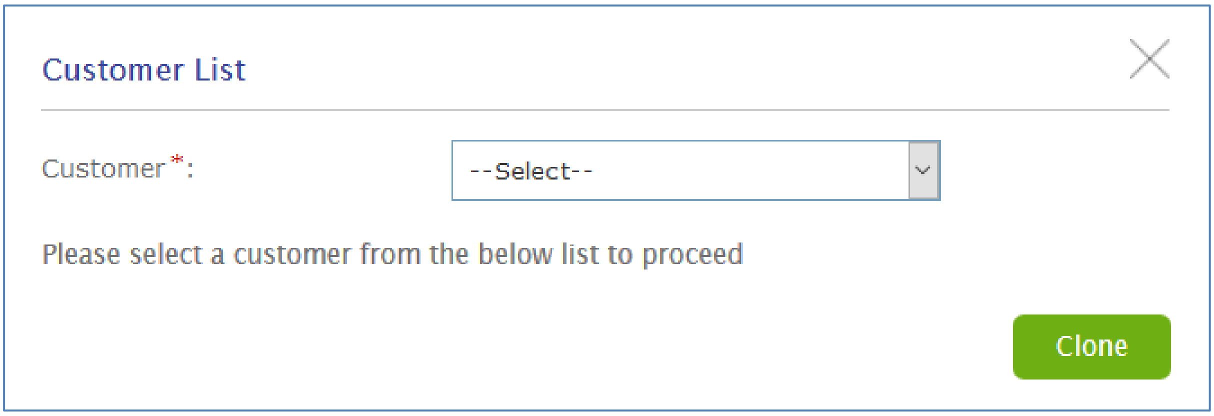
1. Go to the Catalog listing page from side panel > My Catalog > View/Update Catalogs > select buyer company.



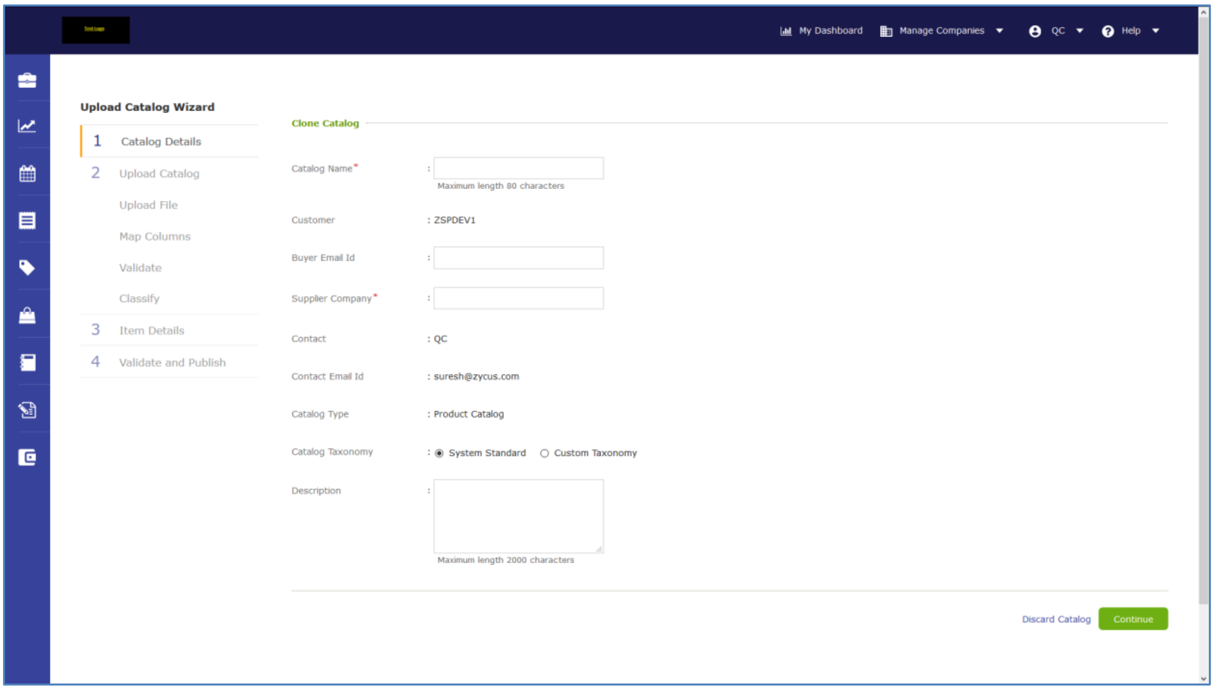

2. One this listing page, click the **Actions** option to clone an existing catalog. You will see the option to clone that catalog as shown in the image below:



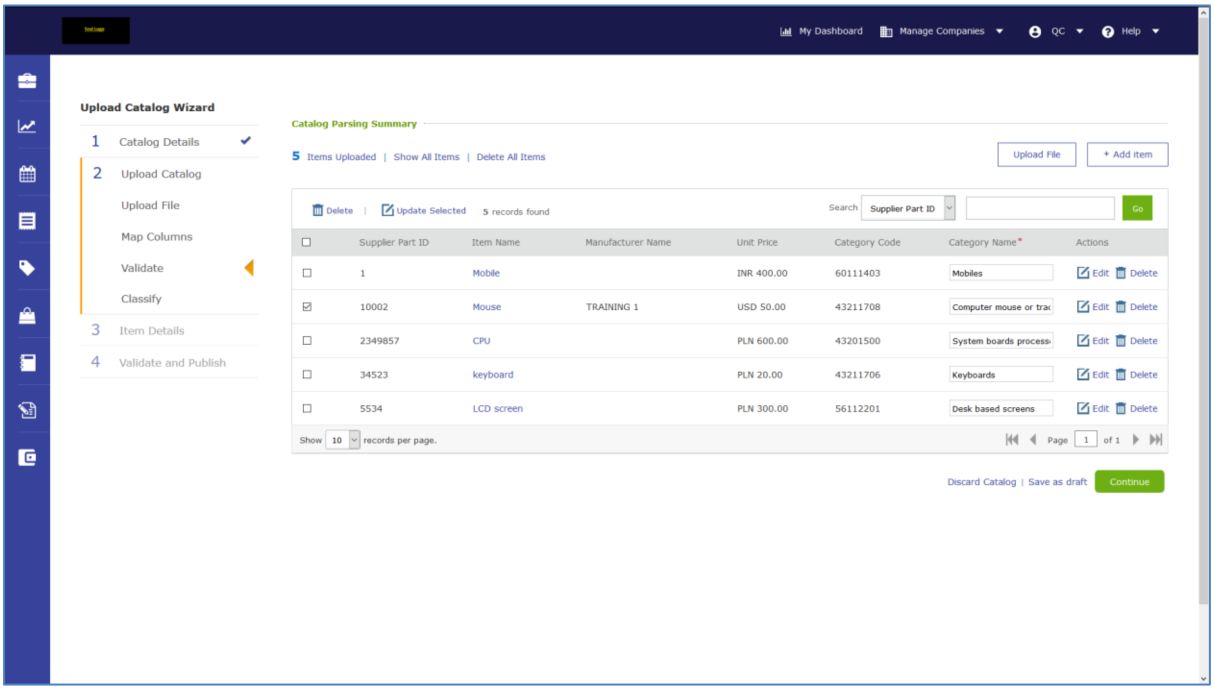

3. Once you click to clone, you will need to select a buyer for whom you are cloning the catalog.



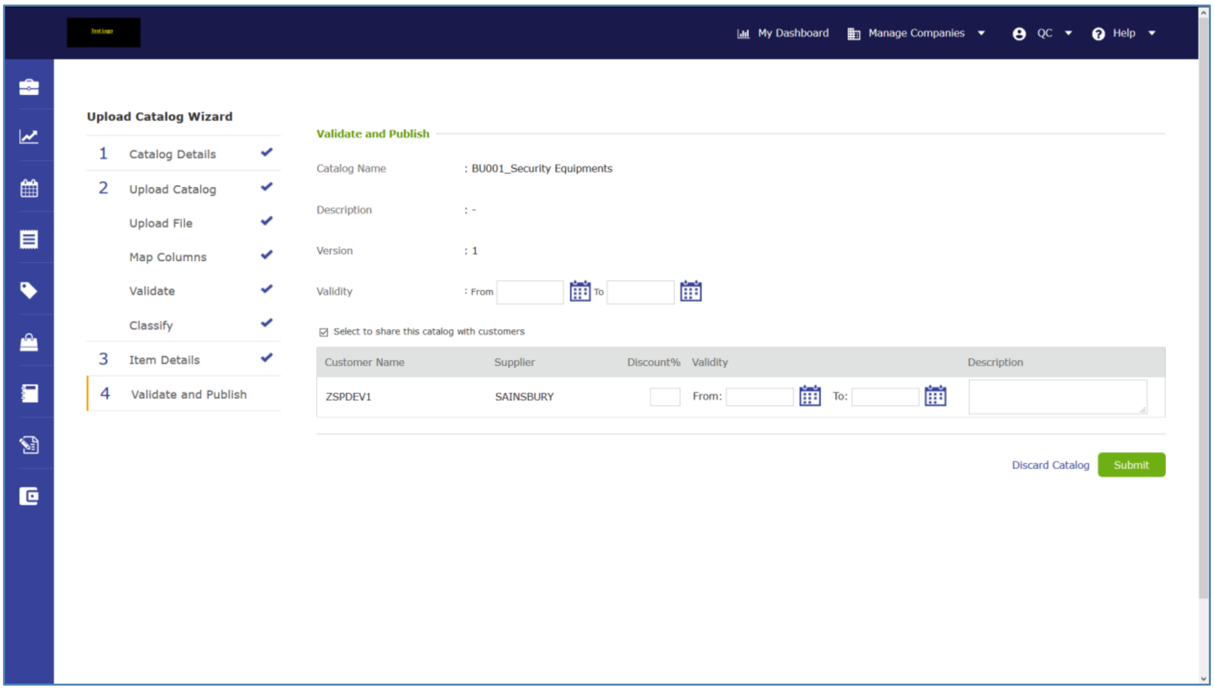

4. Choose a buyer form the drop-down list and click **Clone**. You will be redirected to the **Catalog Details** page:




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:




7. 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.
8. Once all the items are added, click **Continue**. The next step is to review and enter the validity for your catalog as shown below:



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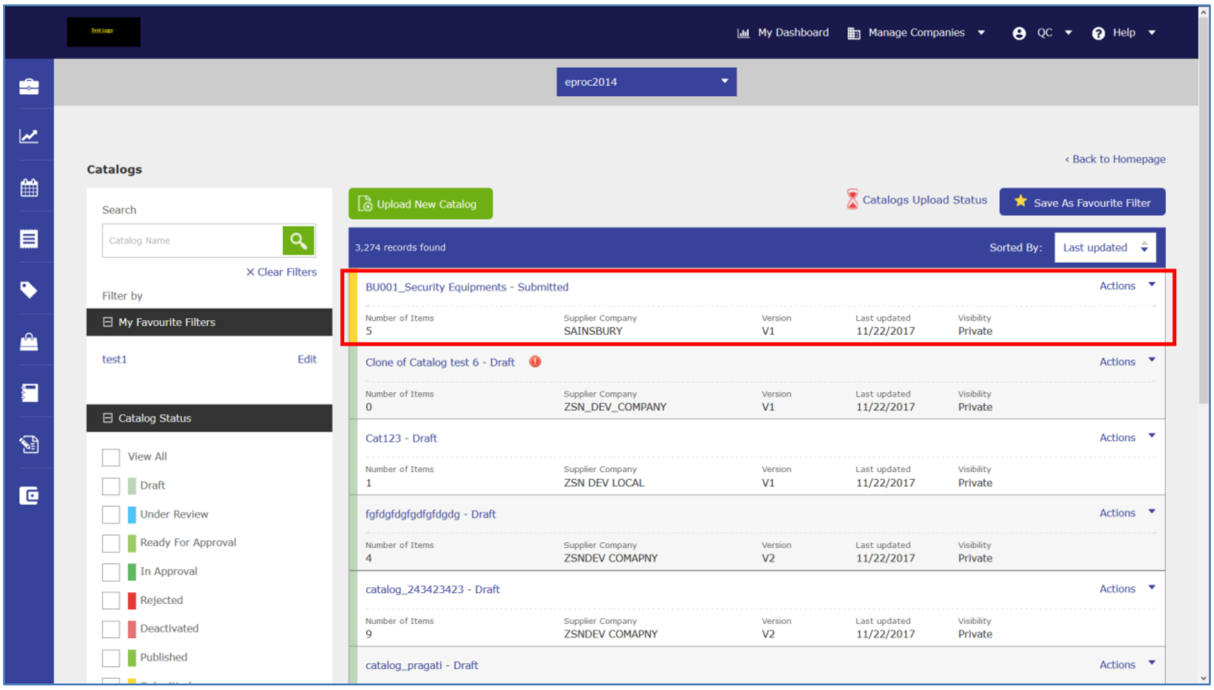
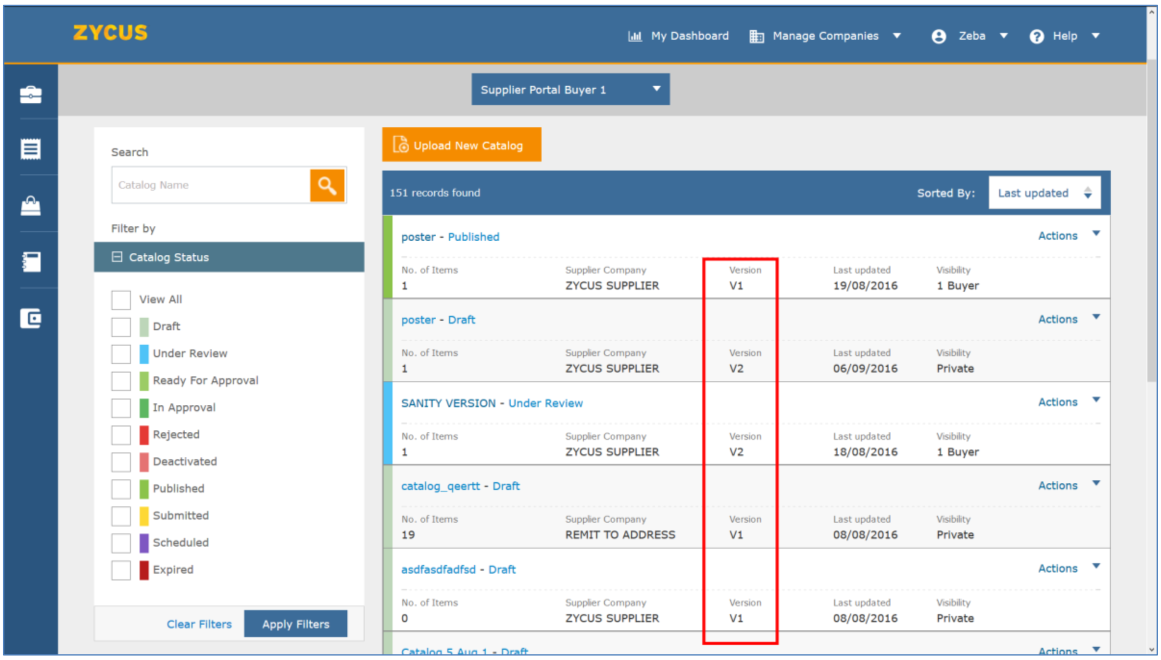
9. Once the required information is added, click **Submit**. You will be able to view your submitted catalog on the listing page as shown below:



### 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:




***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.

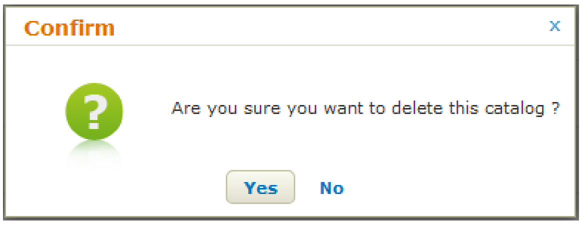
### 6.9.5 How to Delete a Catalog?

**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

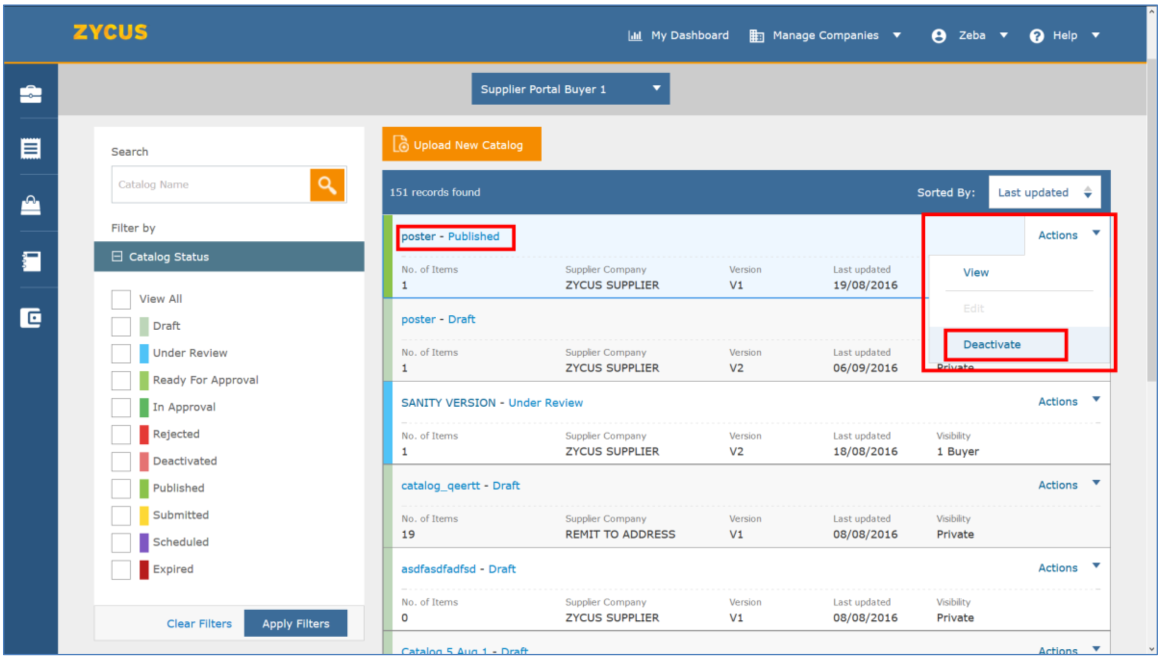



4. Click **Yes** to delete the catalog

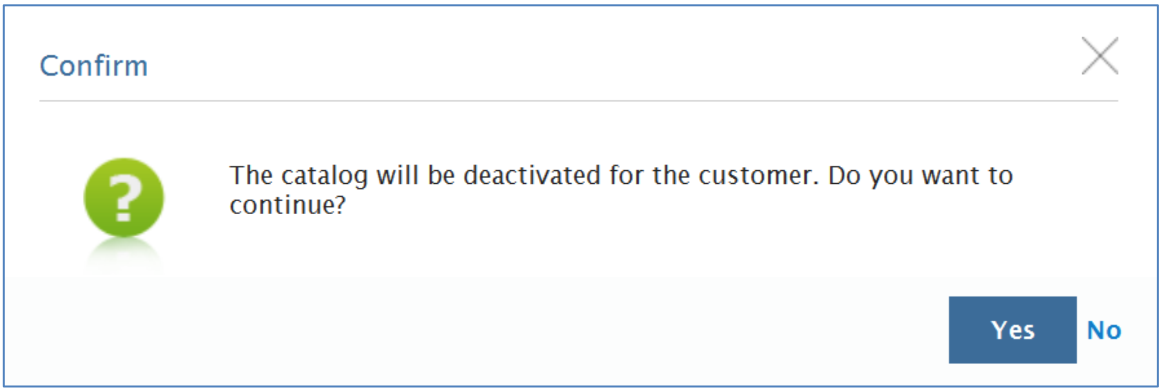
| | |
|---|---|
| | *Published Catalogs cannot be deleted unless deactivated first.* |
| | *On deleting catalogs, the respective buyer company will be notified. Also the same catalog will be updated in eProc with status Deleted* |

### 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**.



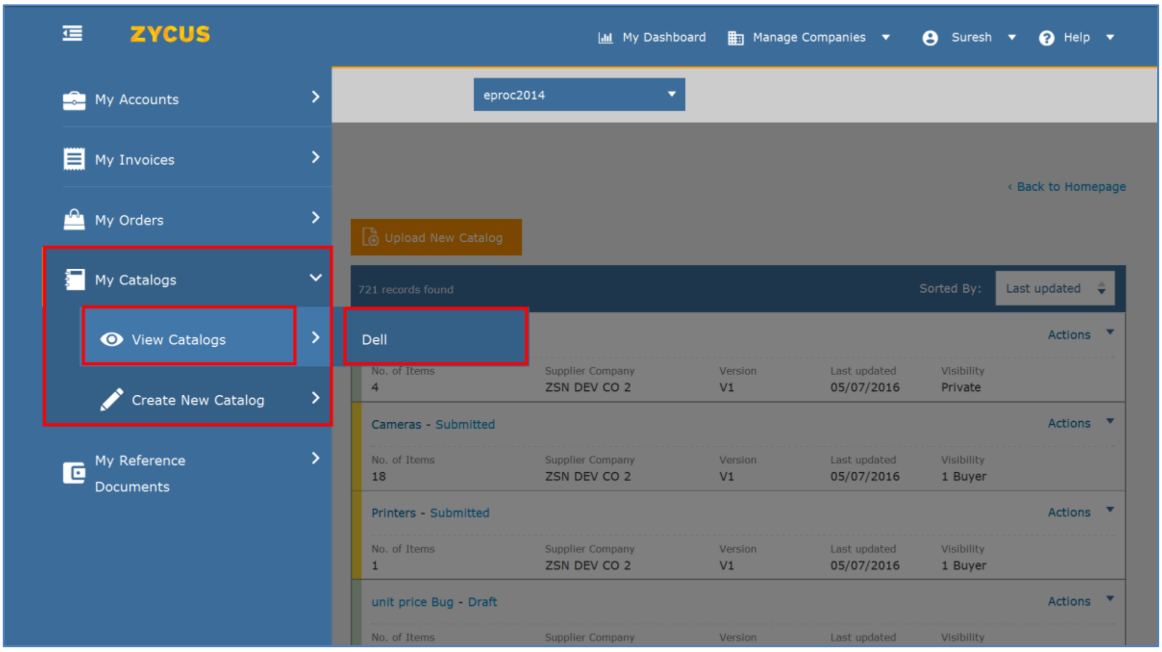

7. Catalog will be successfully deactivated.

### 6.9.7 Catalog Audit Trail

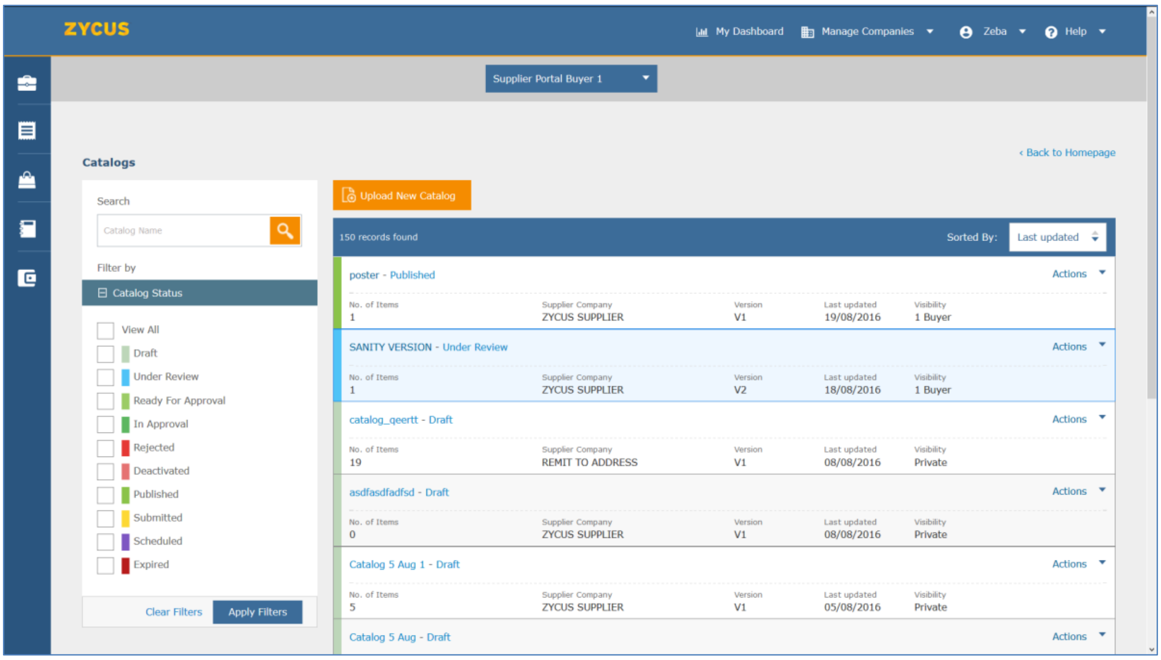
Audit trail offers a functionality to track the changes in the catalog created against the supplier company.

To access audit trail, follow the given steps:

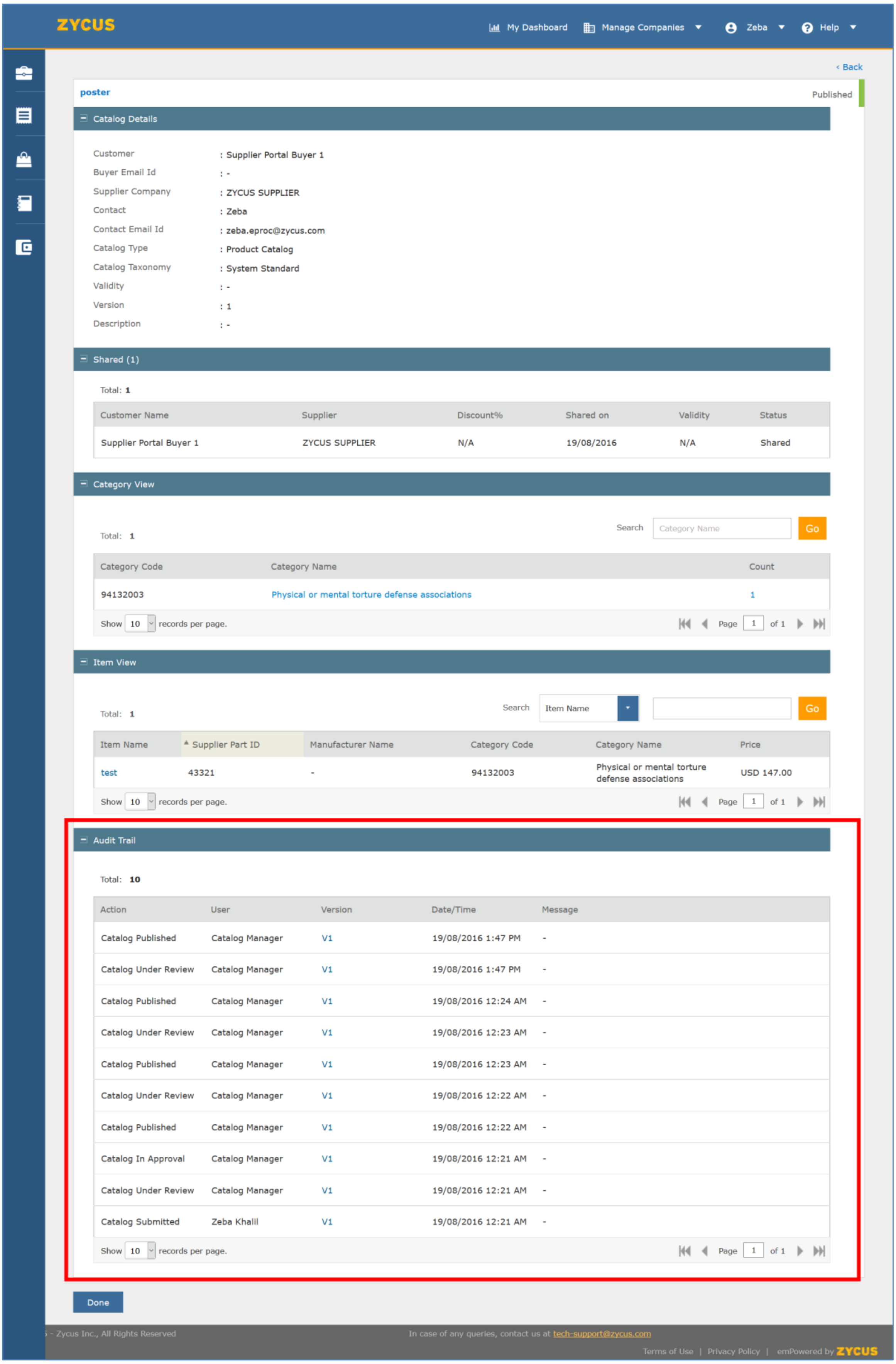
1. From the side panel, go to **My Catalogs**.
2. Hover over **View Catalogs**.
3. Click on the customer company name for which you want to view the catalogs.

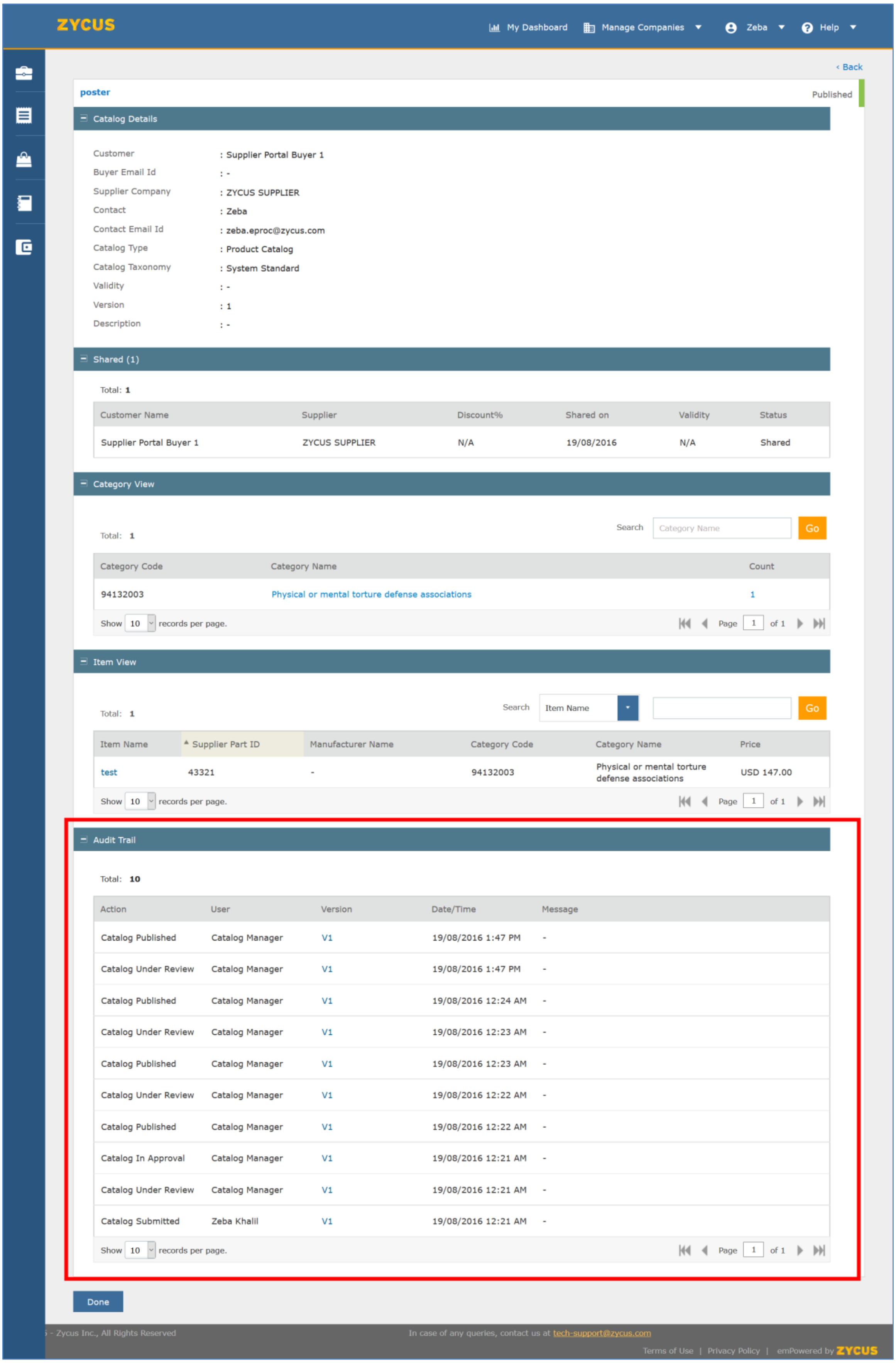



4. The catalog listing page will be displayed as shown below.



5. Click on the Catalog name you wish to view. On clicking the catalog name, following page will be displayed:






***NOTE***: Audit Trail will only be visible in **View** mode, not in **Edit** Mode. This applies as Audit Trail will only

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

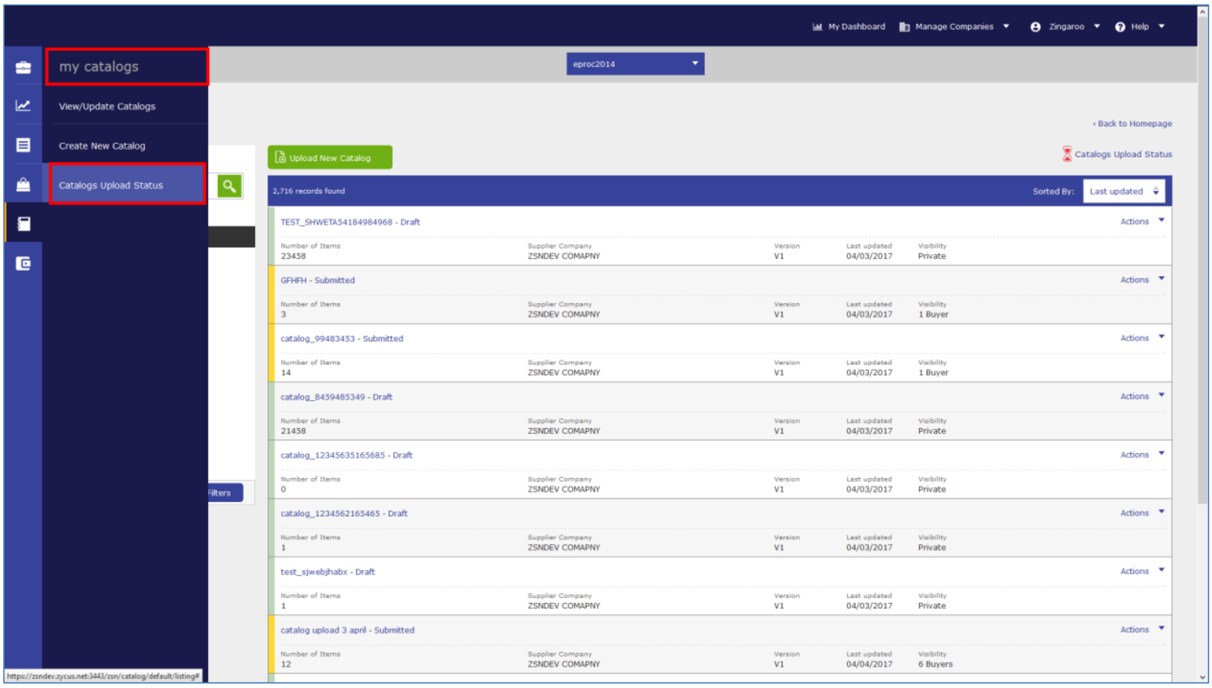
   b) **User**: The user name who performed any action on the catalog
   c) **Version**: This will display the version number based on the modifications made to a catalog.
   d) **Date/Time**: Displays the time and date when actions were be performed on the Catalog.
   e) **Message**: Displays comments added by the user in case any modifications made.

### 6.9.8 Catalog Upload Status

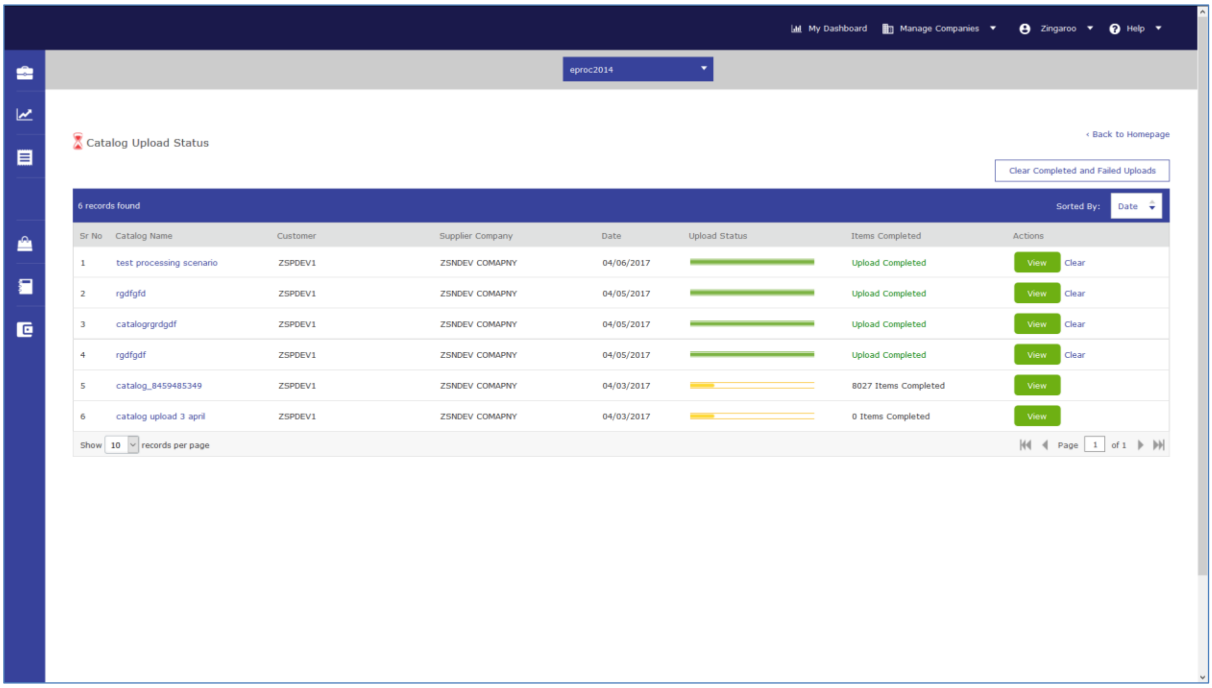
While uploading catalogs that are created offline, processing may take a while if the file size is big. To ensure that the user does not have to wait for this process to complete, ZSN runs the upload process in the background. This will enable the users to access other pages of ZSN without any hindrance.

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:

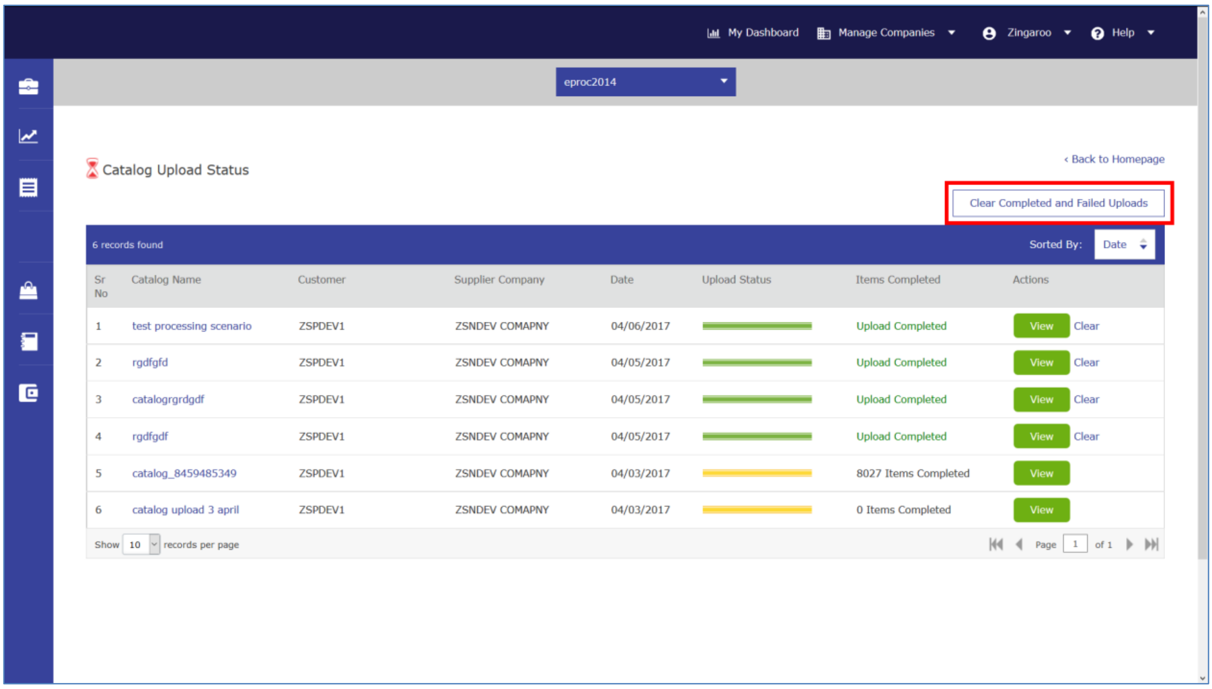



2. You will land on the following page:



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:




**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:

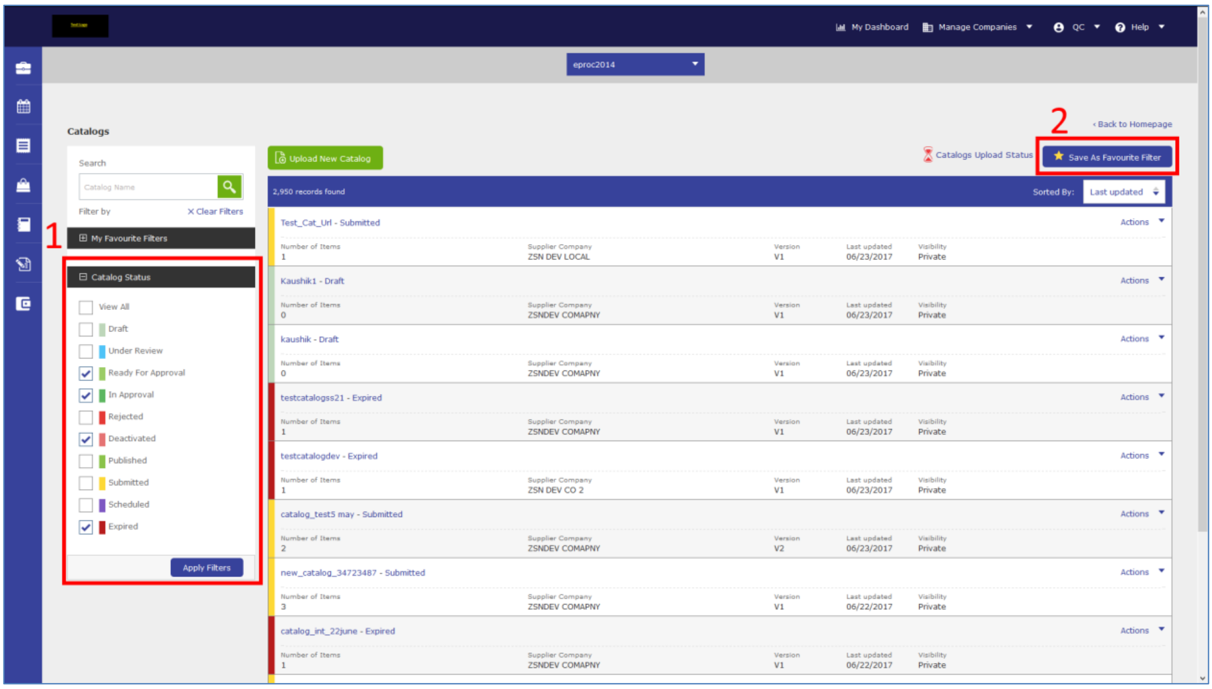
- The upload is successful
- Or the upload has failed

### 6.9.9 Marking Filters as Favorites

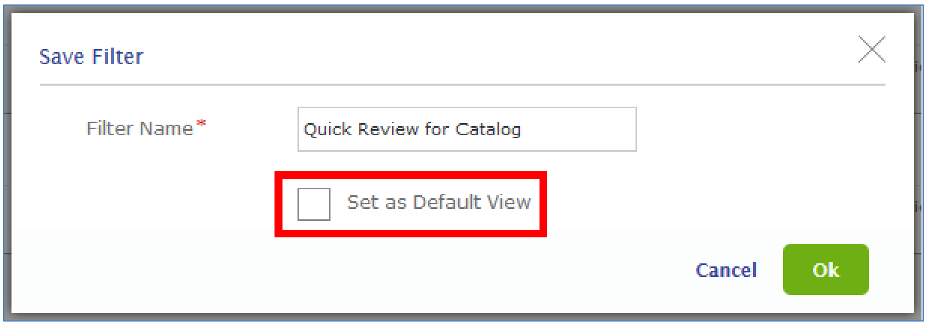
ZSN has enabled the option for the Suppliers to create a filter and save as a favorite. The user can also set one of the filters as their default view. By setting a default view, the listing page will display the entries based on the filters selected.

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:

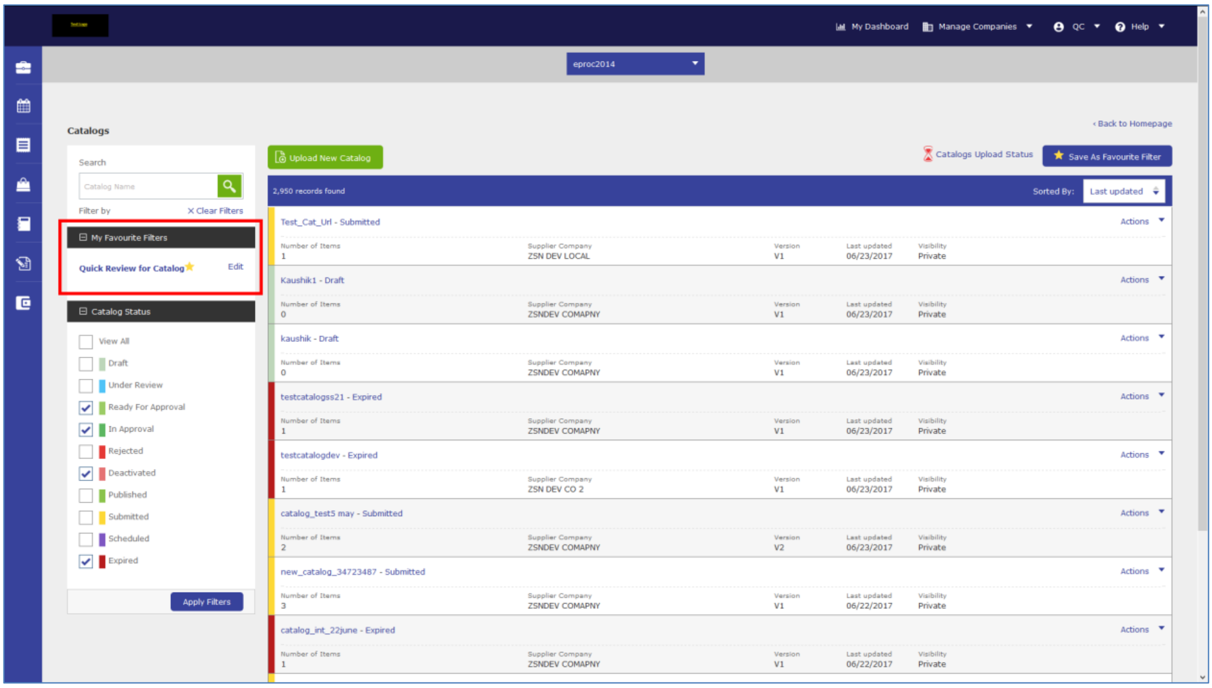



2. Once you choose to save a filter, you will have to name it as shown below:

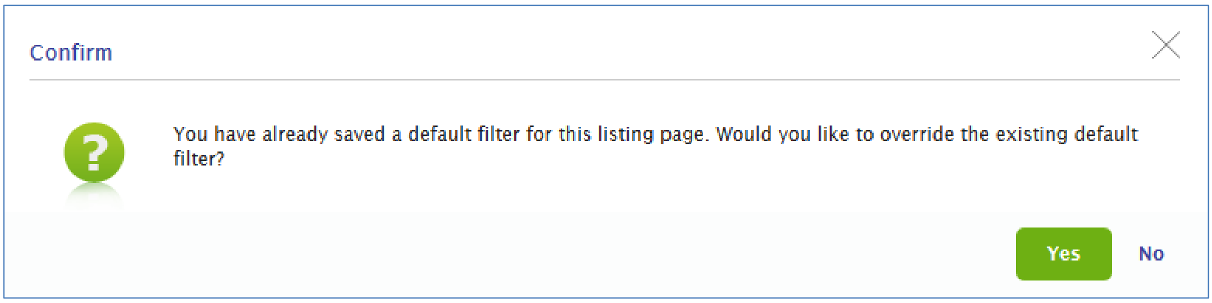



3. To set a filter as default, check the box as shown in the image above. Whenever the user will visit this page, the data will be filtered based on the selected parameters.

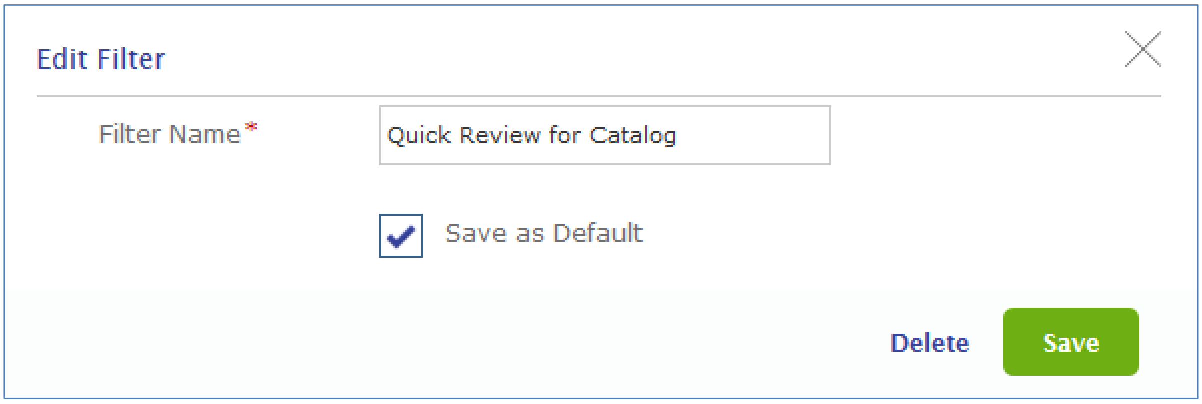
4. Saved filters will be available in the left panel of the listing page as shown below:




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.



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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.

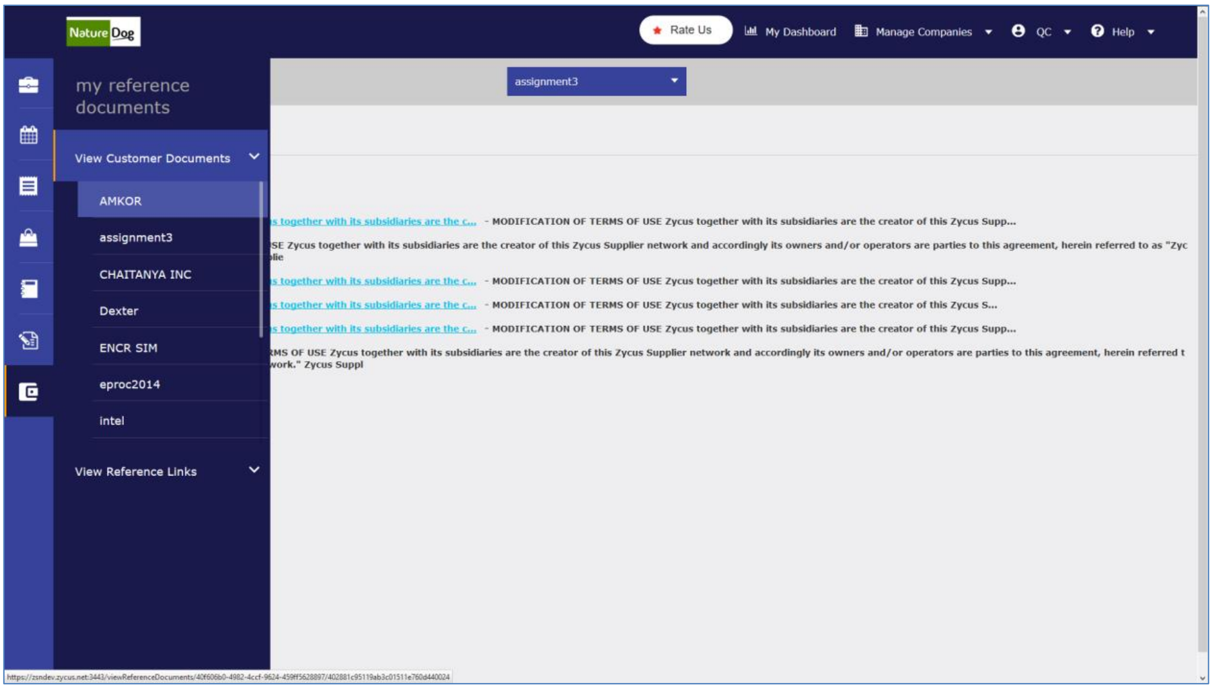
## 6.10 From Where can I Access My Reference Documents?

***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: