



CONNECT MANAGER

SUPPLY ORDER MANAGEMENT TOOL 3.5

MANUAL

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## What is the Supply Order?

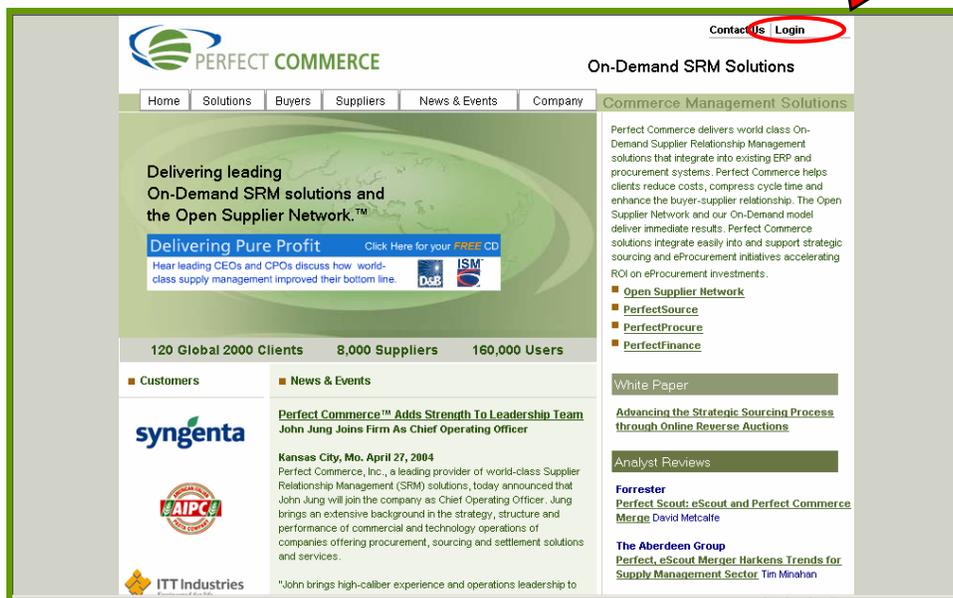
Supplier Order Management is a hosted, secure, Web-based e-commerce management application. It enables suppliers and service providers to conduct a wide variety of transactions online. Suppliers can manage purchase orders, accounts, and shipping for multiple buyers.

## How to begin

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

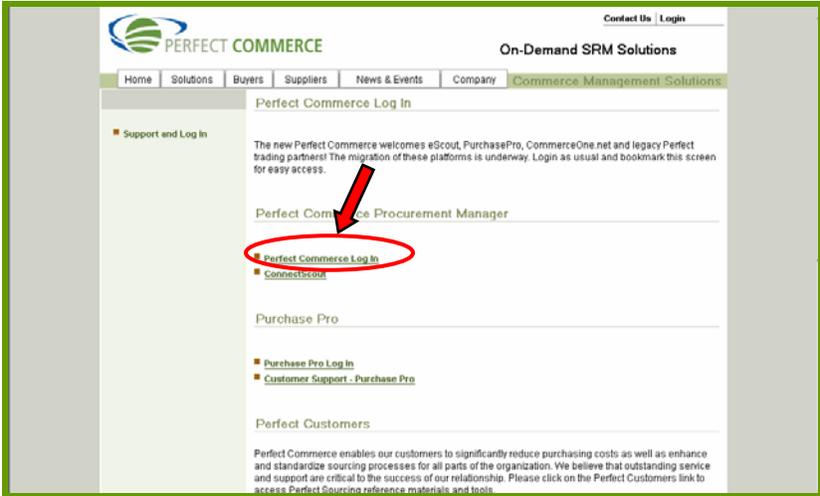
## How to Get Started?

Open your internet browser. Type [www.perfect.com](http://www.perfect.com) in the address line of your browser and click [Go](#).

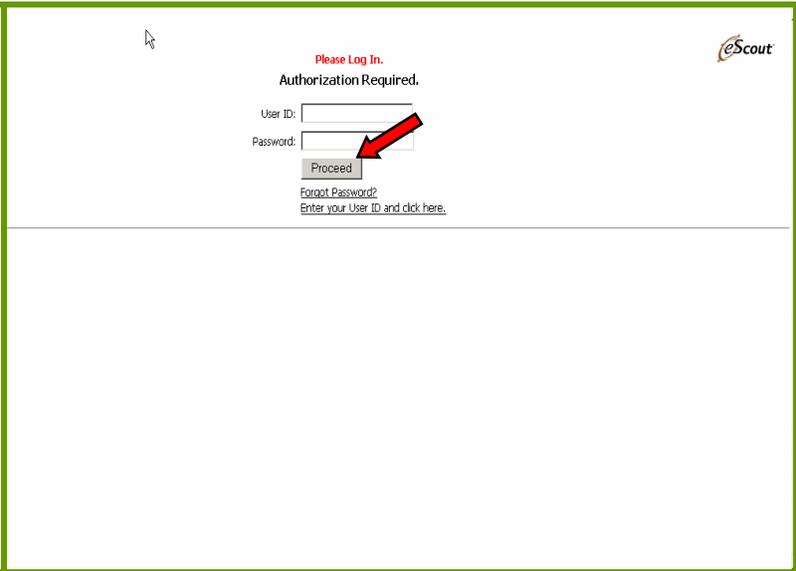


Click the [Login](#) link in the upper right hand corner of the page.

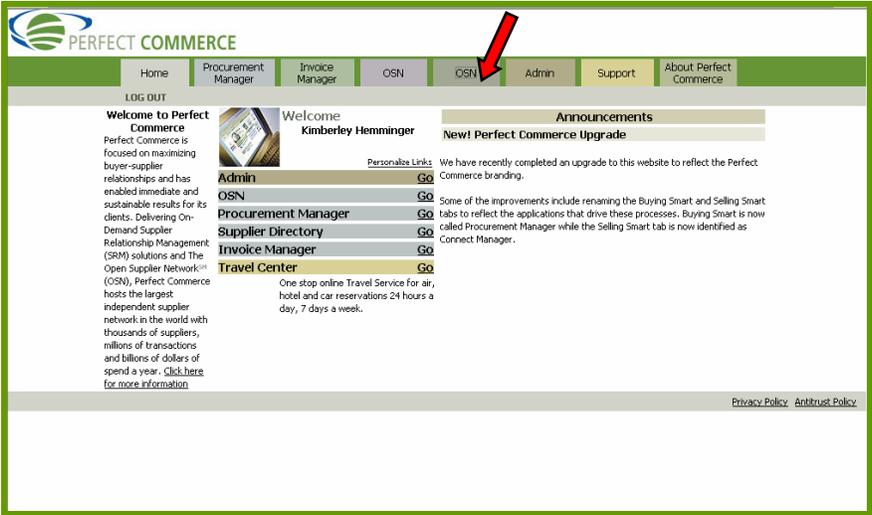
Select the [Perfect Commerce Log In](#) link.



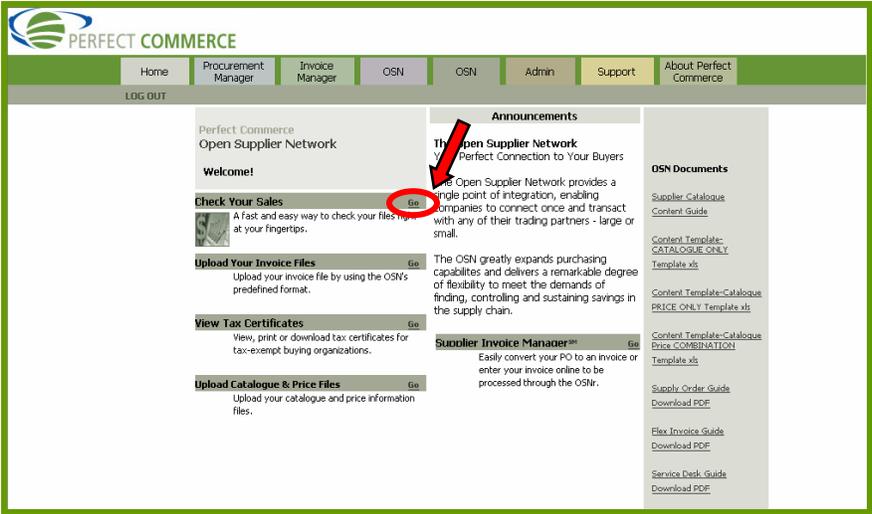
Type your username and password into the specified text boxes, click the word [Proceed](#). If you forgot your password, enter your user ID and click [Forgot Password?](#) link.



Click on the **OSN** link or tab to access the Supply Order portion of the tool.  
Note: You can click the words **Personalize Links** and choose the quick links that you would like on the menu for your Home page.

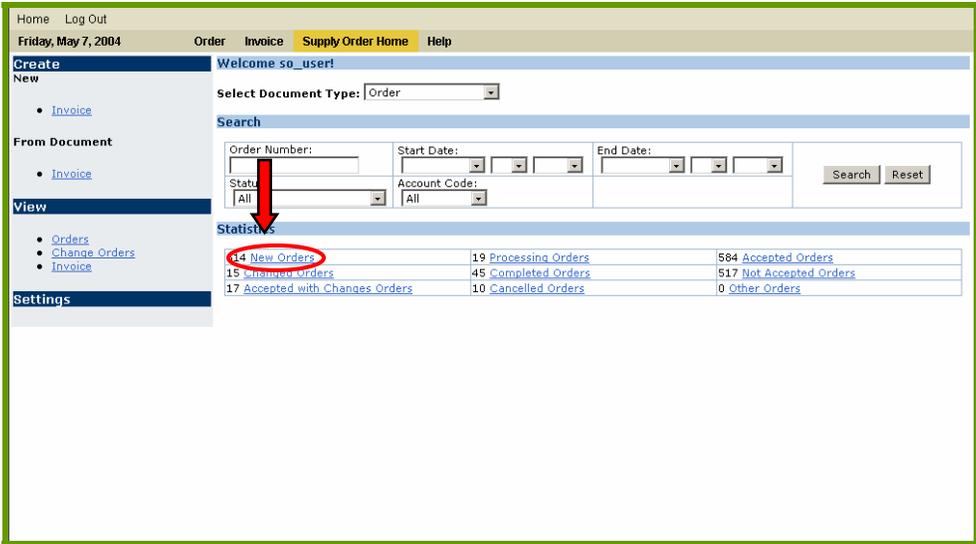


There are links to various tools on this page. Click the word **Go**, next to the words **Check Your Sales** to access the Supply Order Management Tool.



**Viewing Orders**

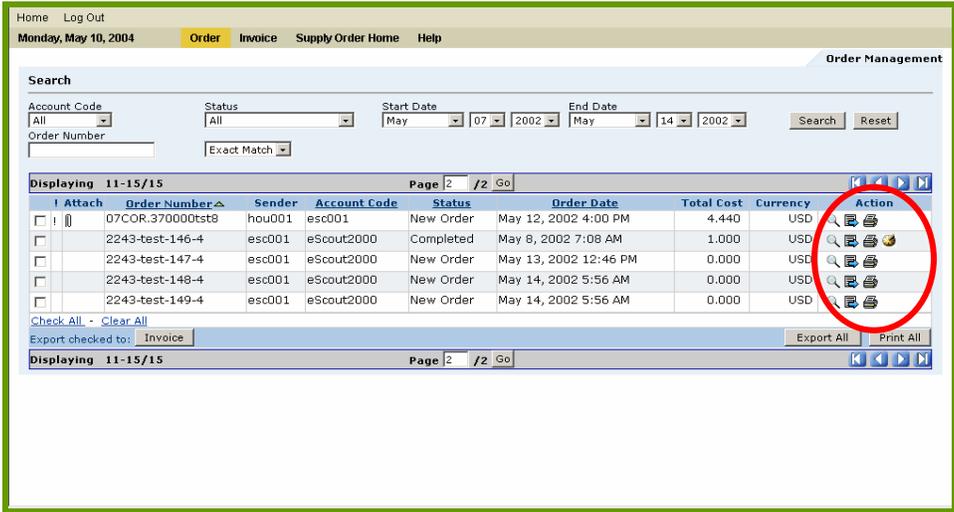
This is the Home Page for Supplier Order Management. From the Home Page, there are numerous ways to find and view orders (which include blanket orders and change orders) and other documents. To view all New Orders, from the Statistics section of your workspace, click the [New Orders](#) link.



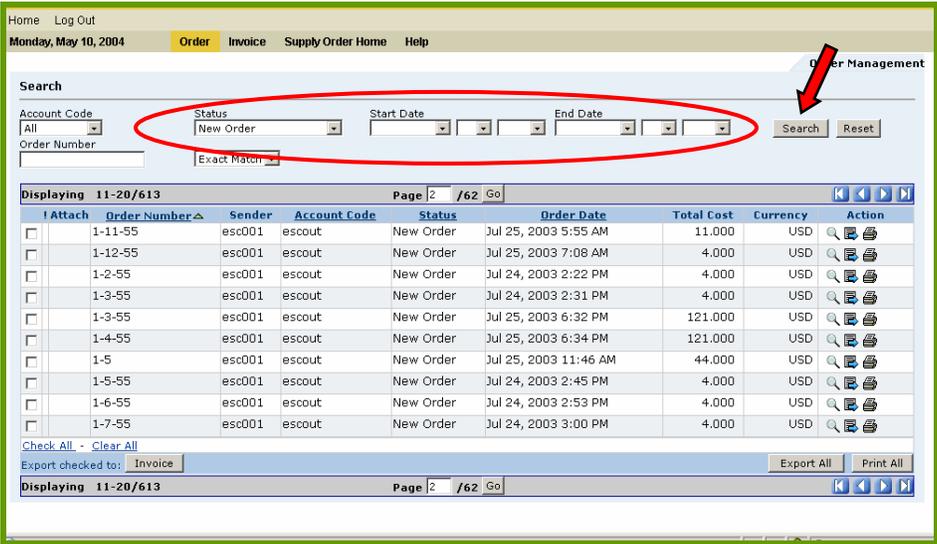
The Order Management page appears. It displays: Status of New Order with basic header information for each order: Order Number, Sender, Account Code, Status, Order Date, and Total Cost and Currency. There is also an Action box with icons to:

- View 
- Export 
- Print 
- History\* 

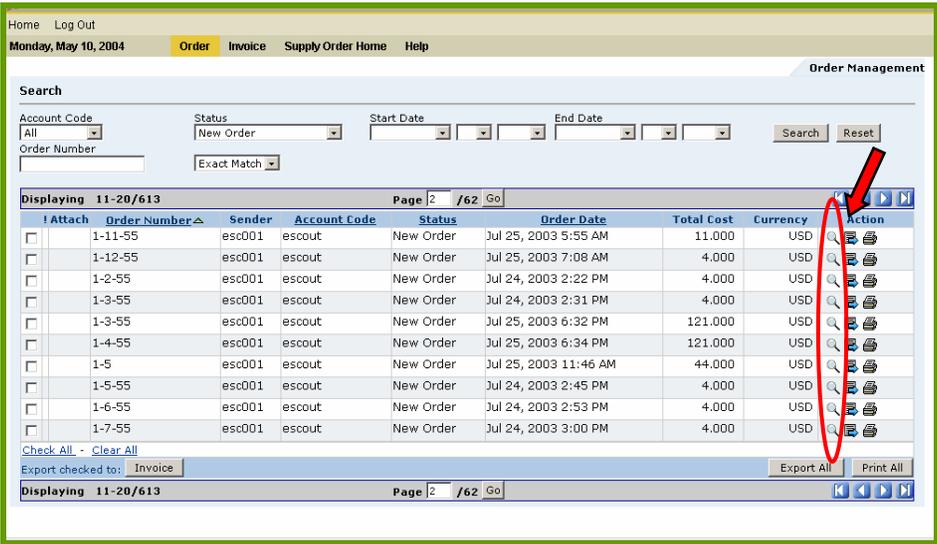
\*(If you're looking at an order that was already processed)



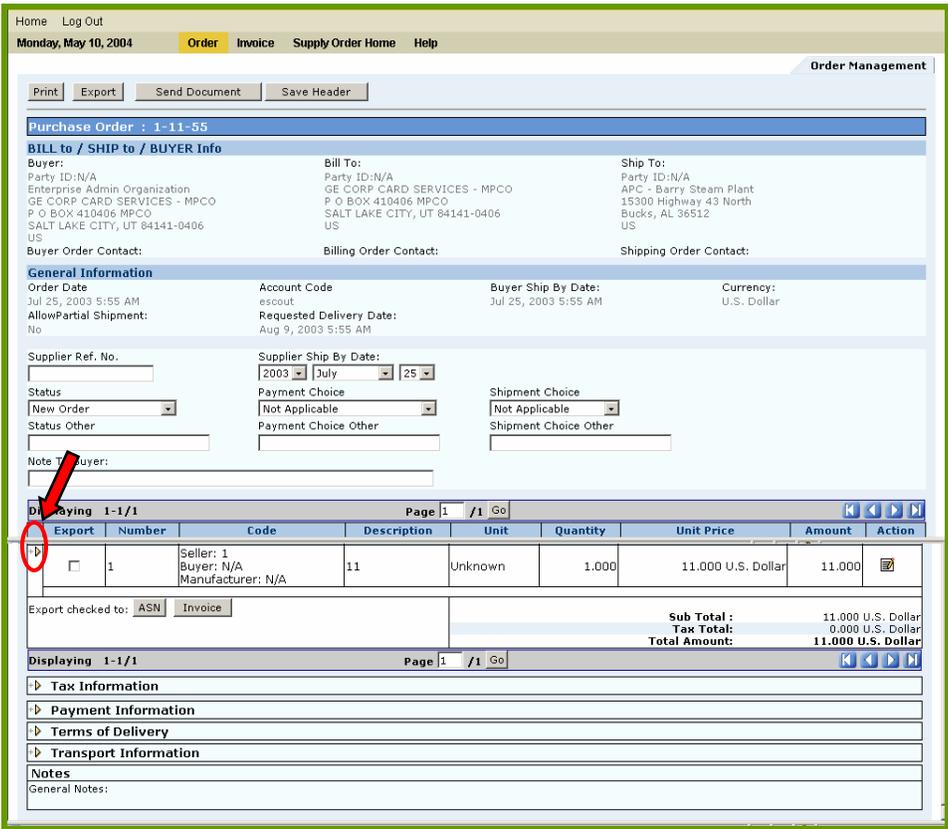
You can further refine your search by entering search criteria in the *Search* section of the page. In the Start Date field, select **June 01, 2004** and in the End Date field, select **June 1, 2004**. Click on the drop down arrow to the right of the Status field. Select **All**, to find all orders for the period of June 1, 2004. Click the **Search** button to run the query.



The search results are now sorted by status. In the column header the sort triangle represents the order (▲ Ascending Order ▼ Descending Order). To view the details of any given order, select the View icon in the Action box. The screen will refresh and display the details of that order.



There are many details available to you on the Purchase Order page for each order. Additional details can be viewed by clicking the roll-down icon  for each section of the Purchase Order.



Home Log Out  
Monday, May 10, 2004 Order Invoice Supply Order Home Help

Order Management

Print Export Send Document Save Header

**Purchase Order : 1-11-55**

**BILL to / SHIP to / BUYER Info**

Buyer: Party ID: N/A  
Enterprise Admin Organization  
GE CORP CARD SERVICES - MPCO  
P O BOX 410406 MPCO  
SALT LAKE CITY, UT 84141-0406  
US

Bill To: Party ID: N/A  
GE CORP CARD SERVICES - MPCO  
P O BOX 410406 MPCO  
SALT LAKE CITY, UT 84141-0406  
US

Ship To: Party ID: N/A  
APC - Barry Steam Plant  
15300 Highway 43 North  
Bucks, AL 36512  
US

Buyer Order Contact: Billing Order Contact: Shipping Order Contact:

**General Information**

Order Date: Jul 25, 2003 5:55 AM  
Allow Partial Shipment: No

Account Code: escout  
Requested Delivery Date: Aug 9, 2003 5:55 AM

Buyer Ship By Date: Jul 25, 2003 5:55 AM  
Currency: U.S. Dollar

Supplier Ref. No.:  
Supplier Ship By Date: 2003 July 25

Status: New Order  
Status Other:

Payment Choice: Not Applicable  
Payment Choice Other:

Shipment Choice: Not Applicable  
Shipment Choice Other:

Note To Buyer:

Displaying 1-1/1 Page 1 /1 Go

Export	Number	Code	Description	Unit	Quantity	Unit Price	Amount	Action
<input type="checkbox"/>	1		Seller: 1 Buyer: N/A Manufacturer: N/A	11	Unknown	1.000	11.000 U.S. Dollar	11.000 

Export checked to: ASN Invoice

Sub Total: 11.000 U.S. Dollar  
Tax Total: 0.000 U.S. Dollar  
Total Amount: 11.000 U.S. Dollar

Displaying 1-1/1 Page 1 /1 Go

**Tax Information**

**Payment Information**

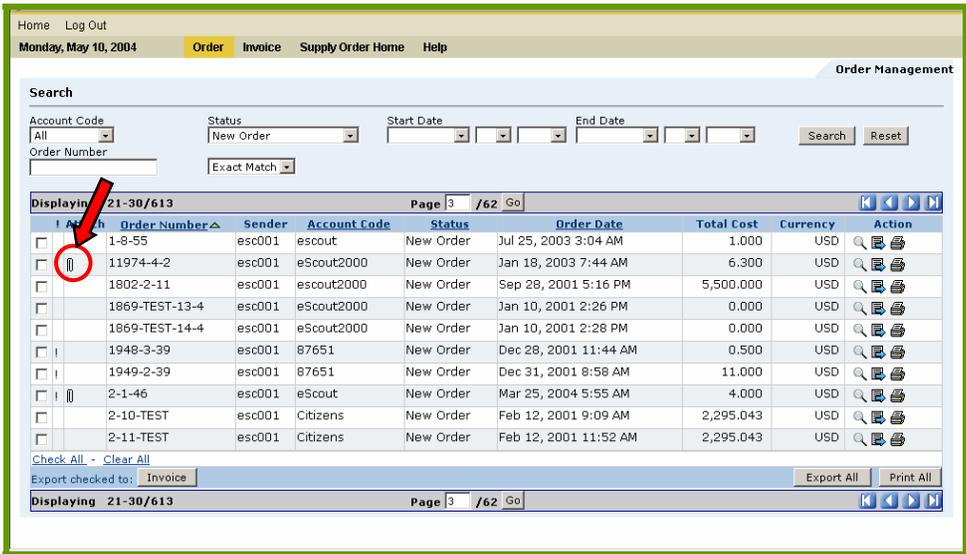
**Terms of Delivery**

**Transport Information**

**Notes**

General Notes:

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



Home Log Out  
Monday, May 10, 2004 Order Invoice Supply Order Home Help

Order Management

**Search**

Account Code: All Status: New Order Start Date: End Date: Search Reset

Order Number: Exact Match

Displaying 21-30/613 Page 3 /62 Go

Attach	Order Number	Sender	Account Code	Status	Order Date	Total Cost	Currency	Action
<input type="checkbox"/>	1-8-55	esc001	escout	New Order	Jul 25, 2003 3:04 AM	1.000	USD	
<input type="checkbox"/>	11974-4-2	esc001	eScout2000	New Order	Jan 18, 2003 7:44 AM	6.300	USD	
<input type="checkbox"/>	1802-2-11	esc001	escout2000	New Order	Sep 28, 2001 5:16 PM	5,500.000	USD	
<input type="checkbox"/>	1869-TEST-13-4	esc001	eScout2000	New Order	Jan 10, 2001 2:26 PM	0.000	USD	
<input type="checkbox"/>	1869-TEST-14-4	esc001	eScout2000	New Order	Jan 10, 2001 2:28 PM	0.000	USD	
<input type="checkbox"/>	1948-3-39	esc001	87651	New Order	Dec 28, 2001 11:44 AM	0.500	USD	
<input type="checkbox"/>	1949-2-39	esc001	87651	New Order	Dec 31, 2001 8:58 AM	11.000	USD	
<input type="checkbox"/>	2-1-46	esc001	eScout	New Order	Mar 25, 2004 5:55 AM	4.000	USD	
<input type="checkbox"/>	2-10-TEST	esc001	Citizens	New Order	Feb 12, 2001 9:09 AM	2,295.043	USD	
<input type="checkbox"/>	2-11-TEST	esc001	Citizens	New Order	Feb 12, 2001 11:52 AM	2,295.043	USD	

Check All - Clear All

Export checked to: Invoice Export All Print All

Displaying 21-30/613 Page 3 /62 Go

In the order details, there is an Attachments section. Click the roll-down icon to view attachment details.

Home Log Out  
Monday, May 10, 2004 Order Invoice Supply Order Home Help

Order Management

Print Export Send Document Save Header

Purchase Order : 11974-4-2

**BILL to / SHIP to / BUYER Info**

Buyer: Party ID: N/A, 963-7993, eScout, 963, 8209 NW Everton, Apt. B, Kansas City, MO 64152, US  
Bill To: Party ID: N/A, eScout, 963, 8209 NW Everton, Apt. B, Kansas City, MO 64152, US  
Ship To: Party ID: N/A, eScout, 963, 8209 NW Everton, Apt. B, Kansas City, MO 64152, US

Buyer Order Contact: Billing Order Contact: Shipping Order Contact:

**General Information**

Order Date: Jan 18, 2003 7:44 AM  
Account Code: eScout2000  
Requested Delivery Date: Feb 2, 2003 7:43 AM  
Buyer Ship By Date: Jan 18, 2003 7:44 AM  
Currency: U.S. Dollar

Supplier Ref. No.:  
Supplier Ship By Date: 2003 January 18  
Status: New Order  
Payment Choice: Not Applicable  
Shipment Choice: Not Applicable

Displaying 1-1/1 Page 1 /1 Go

↳ Tax Information  
↳ Attachments  
↳ Payment Information  
↳ Terms of Delivery  
↳ Transport Information  
Notes

In the Attachments section, under the Filename section, a list of files that are attached is displayed. There is a download link to download and view the attachment file. Click the [Download](#) link to view the attachment.

Allow Partial Shipment: No  
Requested Delivery Date: Feb 2, 2003 7:43 AM

Supplier Ref. No.:  
Supplier Ship By Date: 2003 January 18  
Status: New Order  
Payment Choice: Not Applicable  
Shipment Choice: Not Applicable

Export checked to: ASN Invoice

Export Number	Code	Description	Unit	Quantity	Unit Price	Amount	Action
1	Seller: 6204-2XL Buyer: N/A Manufacturer: N/A	White 100% cotton T-shirt with eScout screen printed logo, size 2XL	Each	1.000	6.300 U.S. Dollar	6.300	

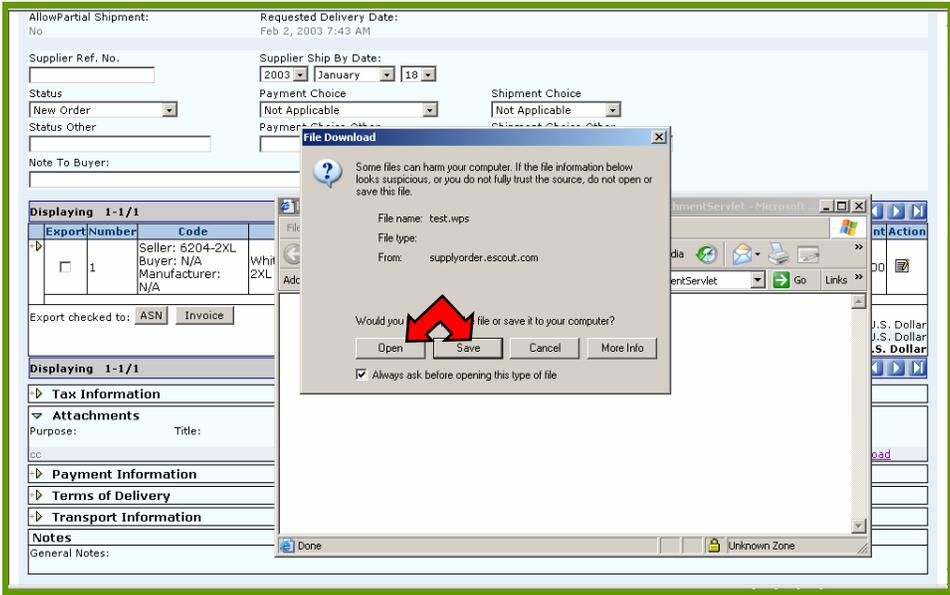
Sub Total : 6.300 U.S. Dollar  
Tax Total : 0.000 U.S. Dollar  
Total Amount : 6.300 U.S. Dollar

Displaying 1-1/1 Page 1 /1 Go

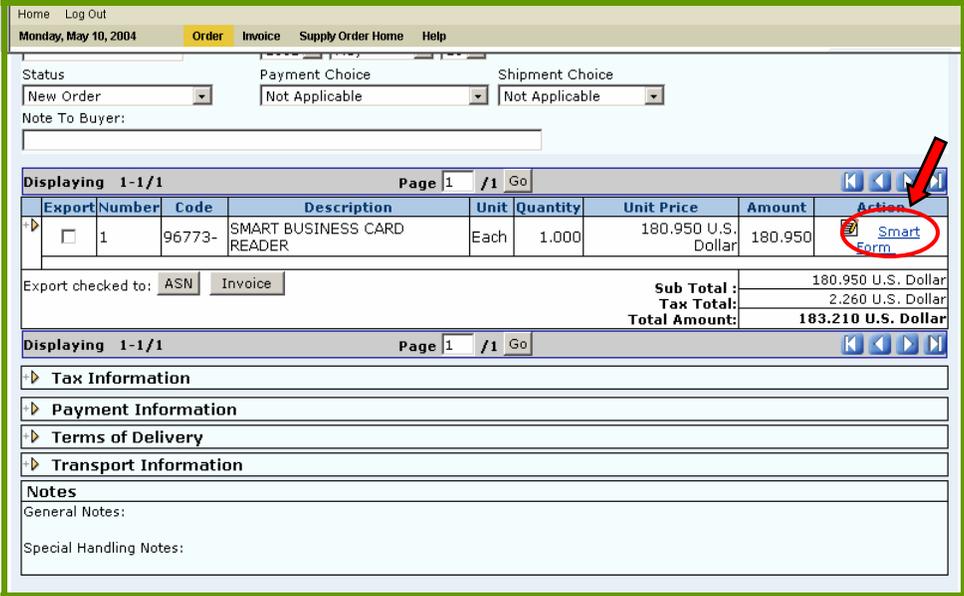
↳ Tax Information  
↳ Attachments  
↳ Payment Information  
↳ Terms of Delivery  
↳ Transport Information  
Notes

Purpose	Title	Language	Filename	Action
			test.wps	Download

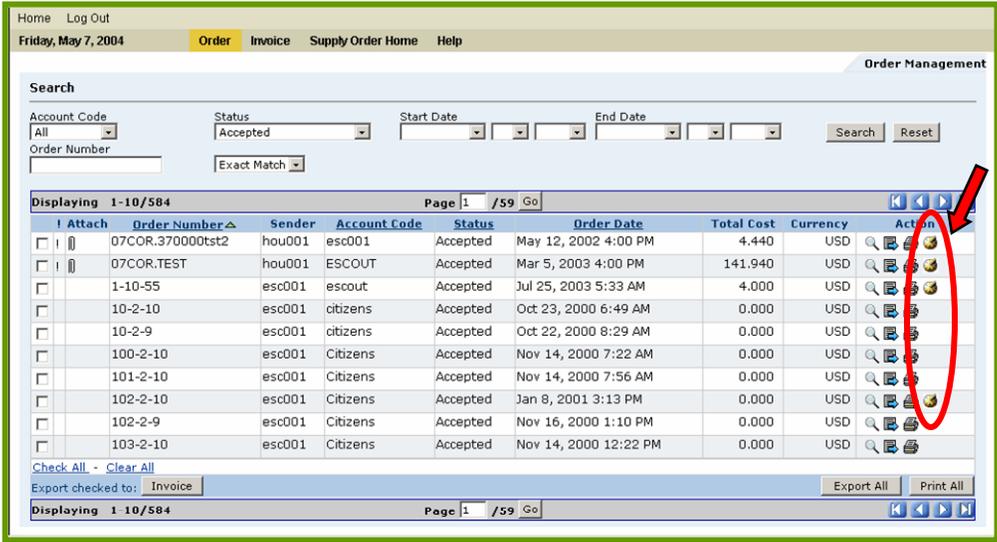
A File Download box displays. You can select **Open** to open this file from its current location to view the attachment contents, or select **Save** to save this file to disk to save the file locally.



Smart Forms provide a structured format for providing specific, customized information about a product or service. These attachments are often used for such commodities and services as business cards, temporary labor and clothing. When a Smart Form pertains to a specific line item, a **Smart Form** hyperlink will appear in the Action box. Click on the Smart Form link to view the **Smart Form**. Close the window to exit the Smart Form.



If an order has been accepted, you can view the history of the order. Search for the Purchase Order from the Supply Order Home and click the  History icon.



Home Log Out  
Friday, May 7, 2004 Order Invoice Supply Order Home Help

Order Management

Search

Account Code: All Status: Accepted Start Date: End Date: Search Reset

Order Number: Exact Match

Displaying 1-10/584 Page 1 /59 Go

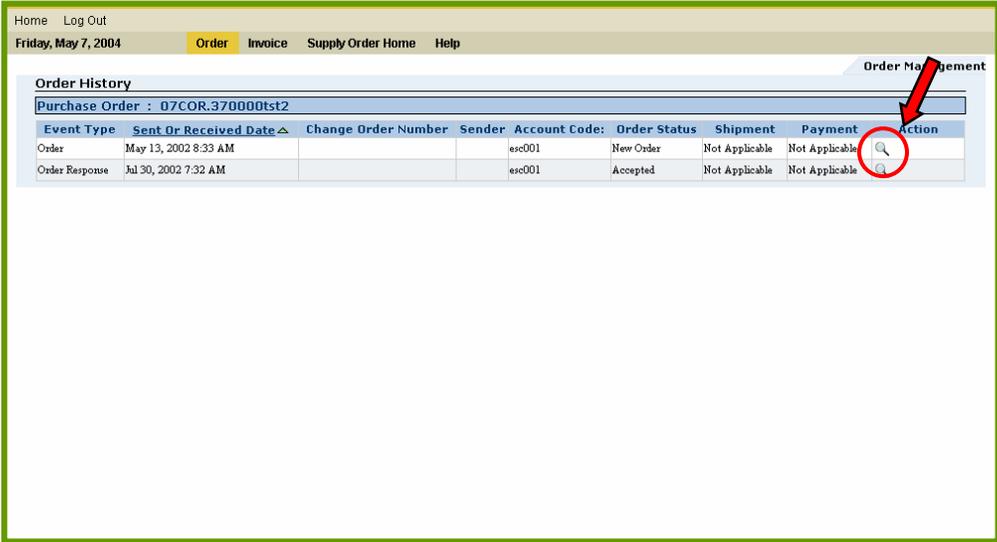
Attach	Order Number	Sender	Account Code	Status	Order Date	Total Cost	Currency	Action
<input type="checkbox"/>	07COR.370000tst2	hou001	esc001	Accepted	May 12, 2002 4:00 PM	4.440	USD	  
<input type="checkbox"/>	07COR.TEST	hou001	ESCOUT	Accepted	Mar 5, 2003 4:00 PM	141.940	USD	  
<input type="checkbox"/>	1-10-55	esc001	escout	Accepted	Jul 25, 2003 5:33 AM	4.000	USD	  
<input type="checkbox"/>	10-2-10	esc001	citizens	Accepted	Oct 23, 2000 6:49 AM	0.000	USD	  
<input type="checkbox"/>	10-2-9	esc001	citizens	Accepted	Oct 22, 2000 8:29 AM	0.000	USD	  
<input type="checkbox"/>	100-2-10	esc001	Citizens	Accepted	Nov 14, 2000 7:22 AM	0.000	USD	  
<input type="checkbox"/>	101-2-10	esc001	Citizens	Accepted	Nov 14, 2000 7:56 AM	0.000	USD	  
<input type="checkbox"/>	102-2-10	esc001	Citizens	Accepted	Jan 8, 2001 3:13 PM	0.000	USD	  
<input type="checkbox"/>	102-2-9	esc001	Citizens	Accepted	Nov 16, 2000 1:10 PM	0.000	USD	  
<input type="checkbox"/>	103-2-10	esc001	Citizens	Accepted	Nov 14, 2000 12:22 PM	0.000	USD	  

Check All - Clear All

Export checked to: Invoice Export All Print All

Displaying 1-10/584 Page 1 /59 Go

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



Home Log Out  
Friday, May 7, 2004 Order Invoice Supply Order Home Help

Order Management

Order History

Purchase Order : 07COR.370000tst2

Event Type	Sent Or Received Date	Change Order Number	Sender	Account Code	Order Status	Shipment	Payment	Action
Order	May 13, 2002 8:33 AM			esc001	New Order	Not Applicable	Not Applicable	
Order Response	Jul 30, 2002 7:32 AM			esc001	Accepted	Not Applicable	Not Applicable	

This will show the detail of the order and what changes were made to the order.

Order Management

Print Export History
Purchase Order has encountered a problem: Availability/Price/Contract/Account codes.

**Purchase Order : 07COR.370000tst2**

BILL to / SHIP to / BUYER Info		
<b>Buyer:</b> Party ID: N/A 07COR Household, Corporate 2700 SANDERS ROAD PROSPECT HEIGHTS, IL 60070 US Buyer Order Contact:	<b>Bill To:</b> Party ID: N/A MOUNT PROSPECT 1501 FEEHANVILLE DRIVE MOUNT PROSPECT, IL 60056 US Billing Order Contact:	<b>Ship To:</b> Party ID: N/A MOUNT PROSPECT 1501 FEEHANVILLE DRIVE MOUNT PROSPECT, IL 60056 US Shipping Order Contact:

General Information			
Order Date	Account Code	Buyer Ship By Date:	Currency:
May 12, 2002 4:00 PM	esc001	May 12, 2002 4:00 PM	U.S. Dollar
AllowPartial Shipment:	Requested Delivery Date:		
No	May 12, 2002 4:00 PM		

Supplier Ref. No.	Supplier Ship By Date:	Shipment Choice
Status	Payment Choice	
Note To Buyer:		

Displaying 1-2/2	Page 1	/ 1	Go	<span>⏪</span> <span>⏩</span> <span>⏴</span> <span>⏵</span>
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Export	Number	Code	Description	Unit	Quantity	Unit Price	Amount	Action
<input type="checkbox"/>	1.0	Seller: A26705AN-315086 Buyer: A26705AN-315086 Manufacturer: A26705AN-315086	Post-it Page Markers - Neon, 1	Package	1.000	2.990 U.S. Dollar	2.990	
<input type="checkbox"/>	2.0	Seller: A26539YW-357074 Buyer: A26539YW-357074 Manufacturer: A26539YW-357074	Post-it Notes - Yellow, 100 Sh	Package	1.000	1.450 U.S. Dollar	1.450	

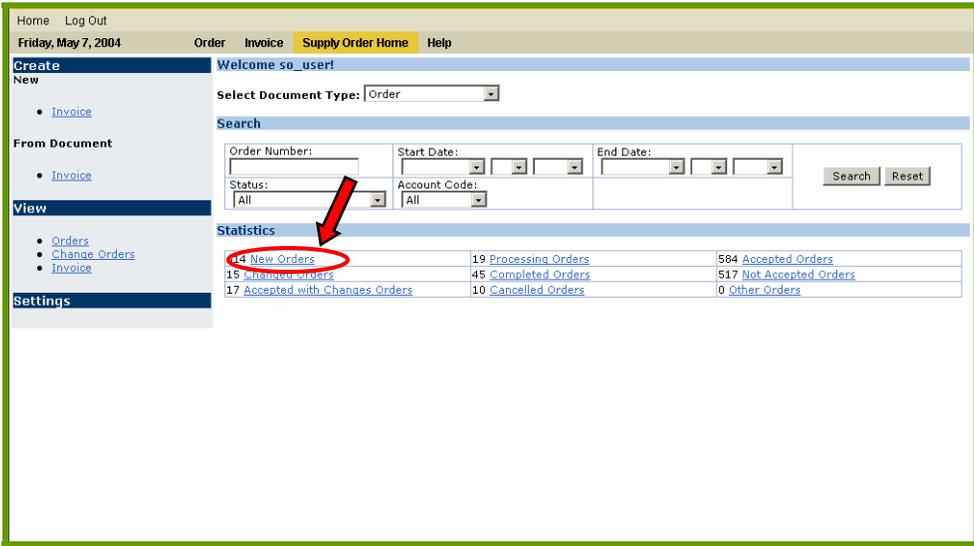
## Processing Orders

Valid Supply Order Management order statuses are set at both the header and the line item level. The Supplier can change any status, with the exception of an order that is cancelled by the Buyer.

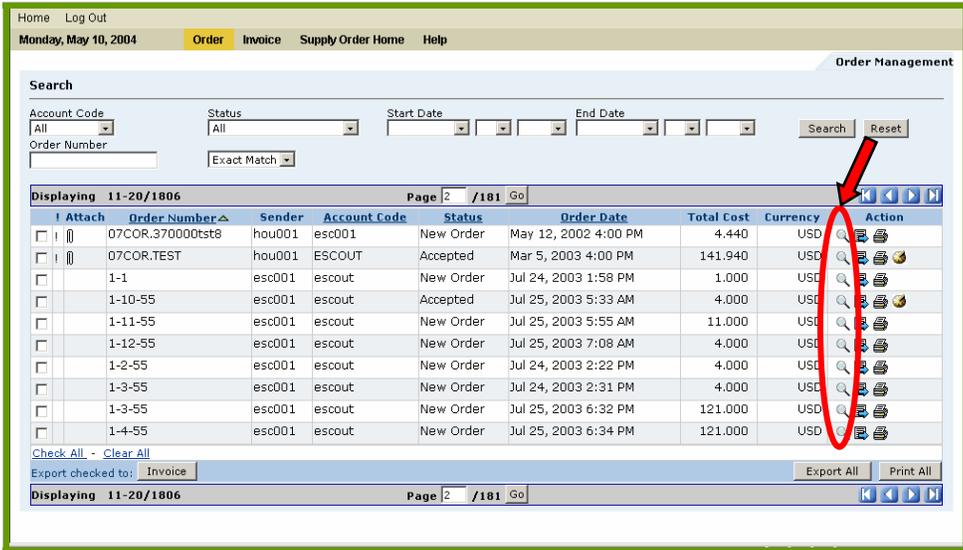
Valid Supplier Order Management order statuses are:

<b>New Order</b>	Supplier has not yet processed the order
<b>Accepted</b>	Supplier accepts the order or item exactly as submitted by the Buyer
<b>Accepted with Changes</b>	Supplier accepts order with his own changes
<b>Not Accepted</b>	Supplier rejects the submitted order, due to price discrepancy or unavailability
<b>Processing</b>	Supplier has received the order and is reviewing it
<b>Completed</b>	Buyer has received goods and Supplier has received payment
<b>Cancelled</b>	Supplier cancels order, or Buyer has cancelled the order using a Change Order request
<b>Prepayment Required</b>	Supplier requires payment in advance before shipping and fulfilling the order
<b>Other</b>	Used when supplier has created customized order statuses. The customized status displays in another field (only used when existing fields are inadequate).

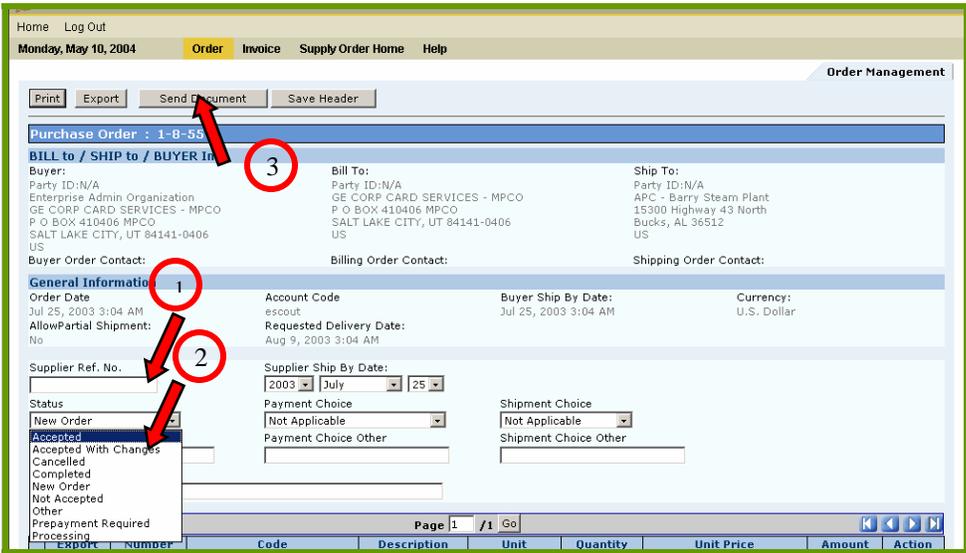
To update the status of an order, click on the words **New Orders**.



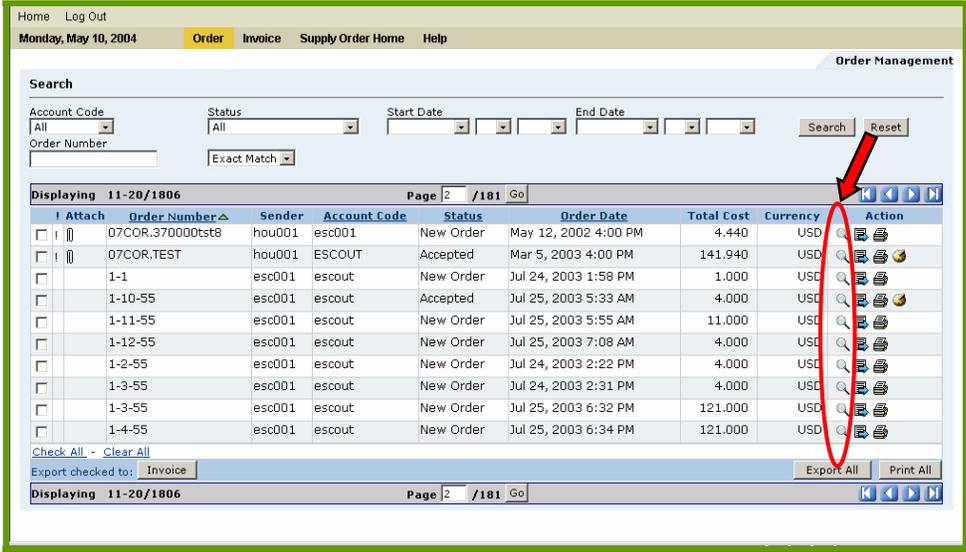
For the order number that you would like to use, click the View  icon on the right of that line item to view the order details.



After viewing the details and determining that the order is correct, enter the Supplier Reference Number in the **Supplier Reference No.** field, change the status in the dropdown to **Accepted**, and click the **Send Document** button. After the screen refreshes you will see a message that states: **Your order has been updated and an Order Response sent to the customer**, at the top of the page.



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



You will notice the message at the top of the page – **Purchase Order has encountered a problem: Availability/Price**. This means that the price submitted by the Buyer does not match the price stored by the Supplier. This message can also include Quantity and Contract (for Blanket Orders) issues as

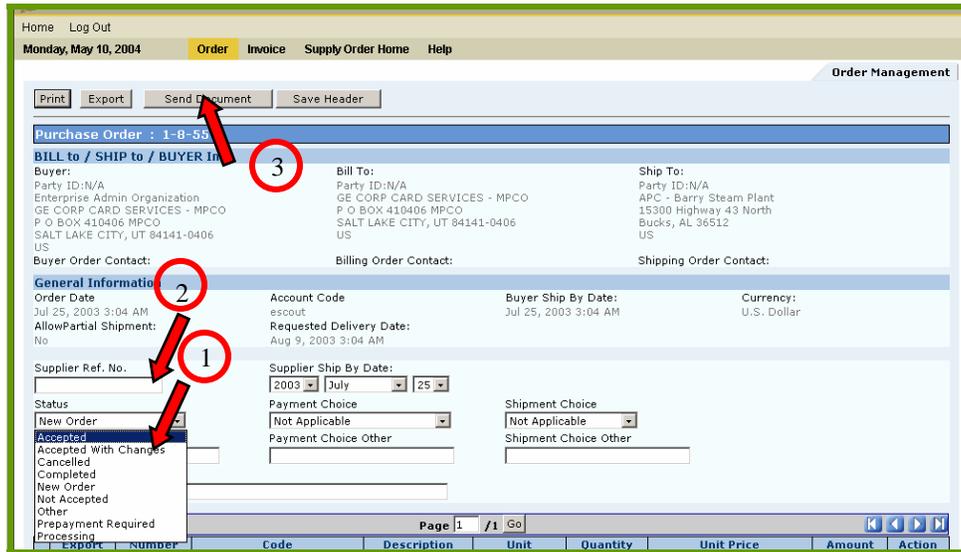
well. In this example, the Supplier has turned on the Auto Validation feature which pre-populated the Supplier Price and flagged the Purchase Order as needing attention when the two fields were out of synch. Scroll down to the Line Item Summary section of this Purchase Order and click the Edit  icon to view the line item details.

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

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

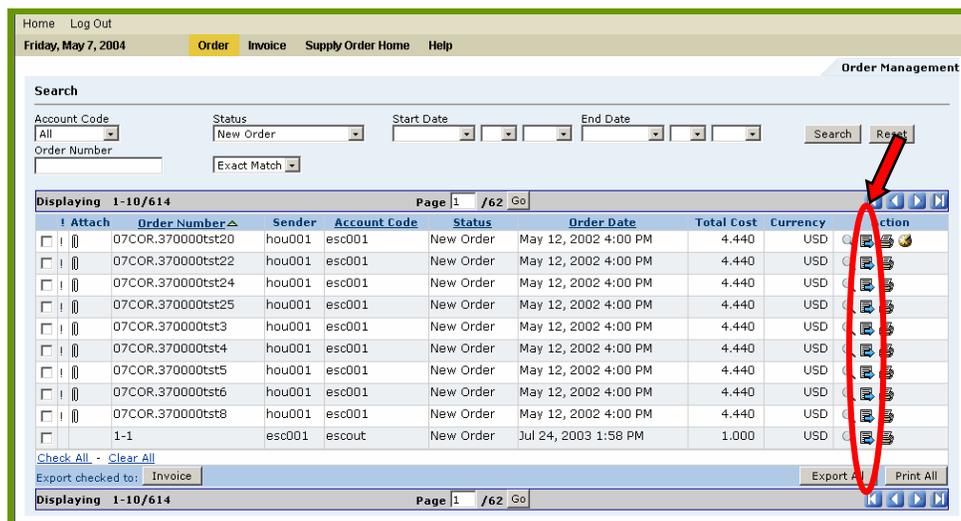
To accept this order, change the Status from **New Order** to **Accepted (1)**. Supplier Reference Number is a required field. Suppliers typically use this field for a sales order number, or some other unique

purchase order identifier. After entering the Supplier Reference Number (2), click **Send Document** (3) to send the Purchase Order Response document. A message: **“Your order has been updated and an Order Response sent to the customer”** is displayed at the top of the details screen. To correct the Price problem, either the buyer needs to update their pricing, or the supplier needs to update their pricing for the account in the catalog/price templates and submit through the CCM Tool.

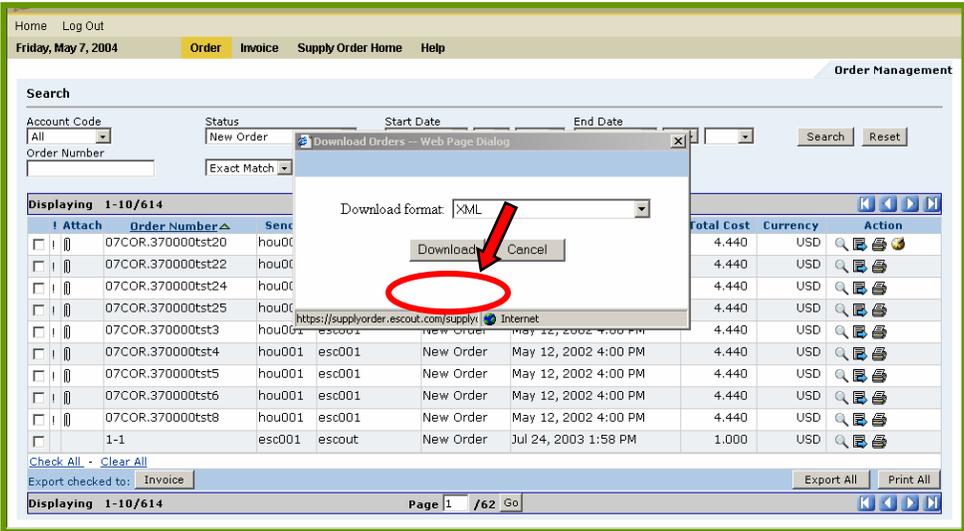


## Exporting Orders

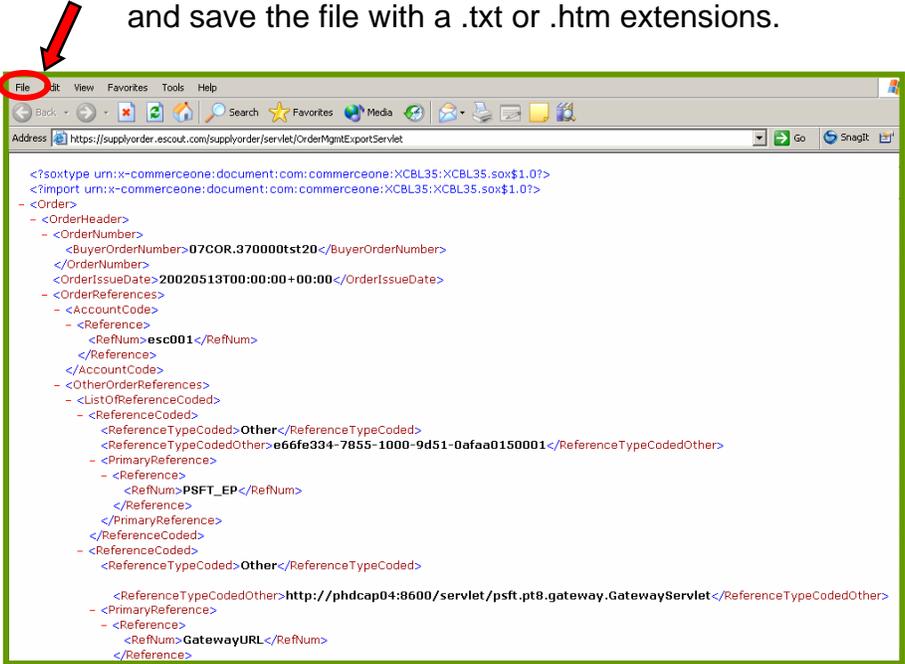
From the Supply Order Home Page, search for the Purchase Order you wish to Export. The file can be exported in XML 3.5 format. The file displays in the browser from which you can save or copy the page. Click the Export icon located within the Actions column.



A dialog box will open with the Export format of XML. Click the **Download** button to continue.

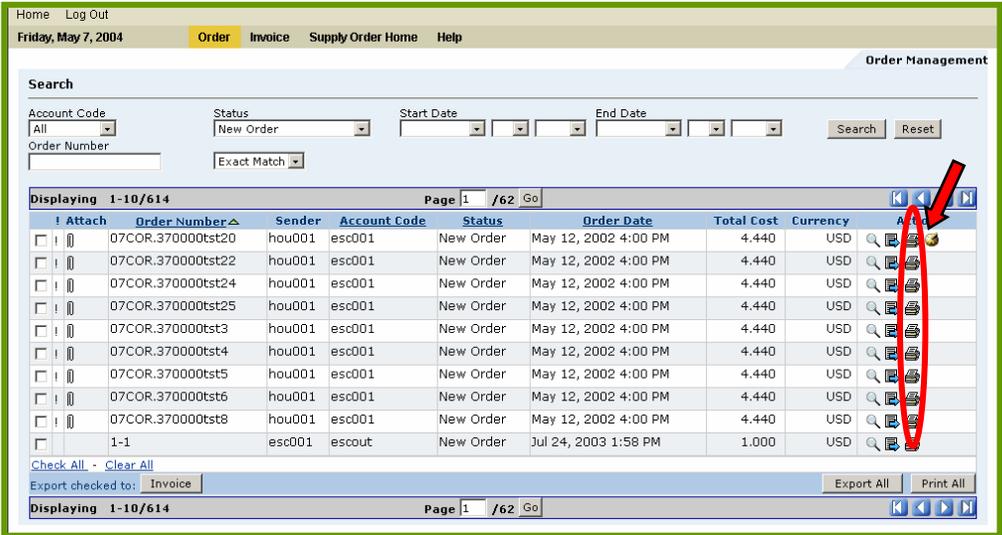


The order details will display with the XML detail. To save the contents locally, select **File, Save As**, and save the file with a **.txt** or **.htm** extensions.

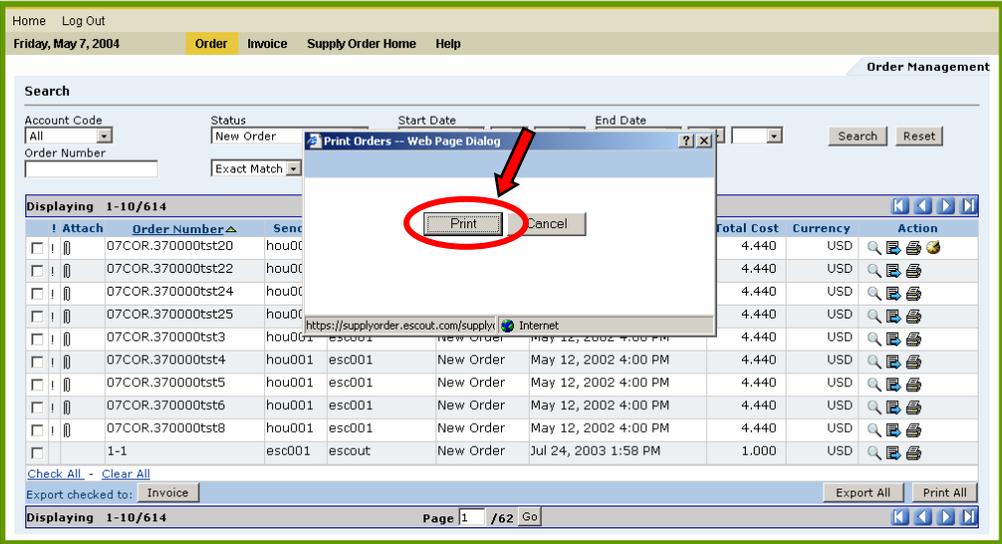


Printing Orders

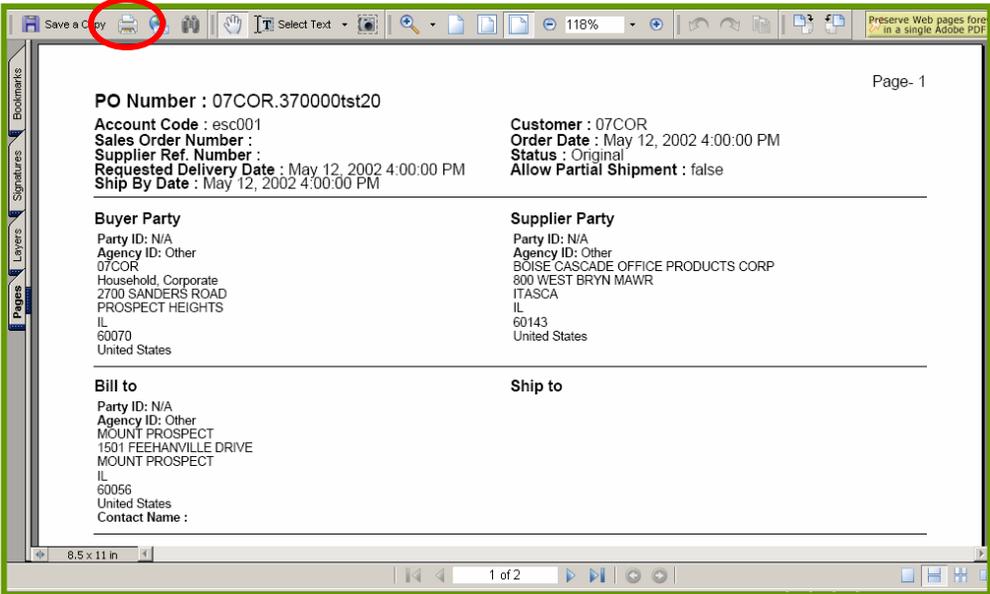
Purchase Orders can be printed from your browser to a PDF format. To print an order, search for the Purchase Order from the Supply Order Homepage. Click on the Print icon located within the Actions.



Click the Print button to continue.

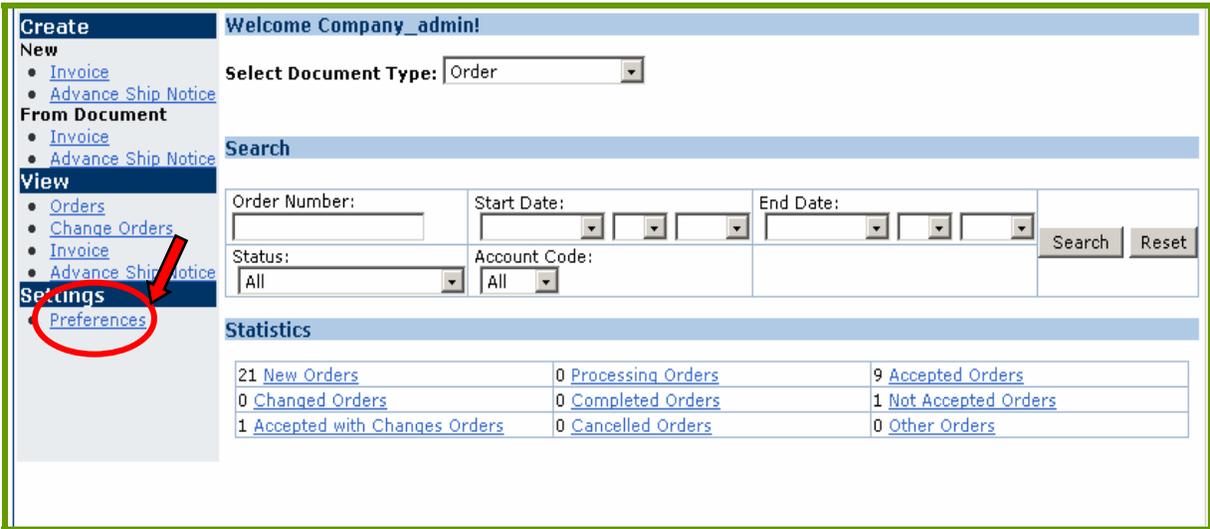


The Order will appear in PDF format in a new browser window where you can click the Printer icon button to print the order.



### Setting Preferences

User Preferences are accessed under the Settings section in the quick access area on the left of your Workspace. You must have administrative privileges in your organization to access Preferences. Click on the [Preferences](#) link to continue.



User Preferences allow suppliers to configure several Supplier Order Management features. General Preferences are preferences set across all modules.

Suppliers can select:

- Maximum Items Displayed based on search results
- Decimal Settings

Preferences	
<input type="button" value="Reset"/> <input type="button" value="Submit"/>	
<b>General Preferences</b>	
<b>Maximum Items Displayed</b> Select maximum number of list items displayed per screen (search results).	10 lines ▾
<b>Decimal Settings</b> Select the number of decimal places to display for Quantity and Price fields.	
Minimum Quantity Decimals	3 ▾
Maximum Quantity Decimals	3 ▾
Minimum Price Decimals	3 ▾
Maximum Price Decimals	3 ▾

<b>Order Management Preferences</b>	
<b>Email Address</b> Enter the supplier email address(es) where you want email notices sent. Required for Auto Notification and Receive Change Order (ON + Automatic Email Notice). For more than one address, separate with comma (,) or semicolon (;).	jbcweb@data-source.cc
<b>Email Notification Regional Settings</b>	
Country	United States ▾
Language	English ▾
Time Zone	Central Standard Time ▾
Please select a Country, Language, and Time Zone to be used for email notices only.	
<b>Auto Notification</b> Select ON if you want automatic email notices about incoming orders. Select a Notification Interval (the time between email notices). For fewer orders listed per email, select a shorter interval or Immediate.	<input checked="" type="radio"/> ON <input type="radio"/> OFF
<b>Order Notification Interval</b> Select a Notification Interval (the time between email notices). For fewer orders listed per email, select a shorter interval or Immediate.	Immediate ▾
<b>Auto Validation</b> Select Auto Validation ON for automatic comparison of the incoming order's price/quantity with supplier price/availability. Select Auto Process ON to automatically accept or reject orders based on Auto Validation (whether order's price/quantity matches supplier price/availability). Auto Validation must be on for Auto Process to work.	<input checked="" type="radio"/> ON <input type="radio"/> OFF
<b>Auto Process</b> Select Auto Process ON to automatically accept or reject orders based on Auto Validation (whether order's price/quantity matches supplier price/availability). Auto Validation must be on for Auto Process to work.	<input type="radio"/> ON <input checked="" type="radio"/> OFF
<b>Receive Change Order</b> Select ON to receive incoming change orders for processing. Select ON + Automatic Email Notice to receive incoming change orders and also email notices.	<input checked="" type="radio"/> ON <input type="radio"/> ON + Automatic Email Notice <input type="radio"/> OFF
<b>Change Order Notification Interval</b> Select a Notification Interval (the time between emails). For fewer change orders listed per email, select a shorter interval or Immediate. Select OFF to automatically reject all change orders.	30 minutes ▾
<b>Auto Cancel Order</b> Receive Change Order must also be ON. Select ON to automatically accept a buyer's cancel order if the order shipment status is set to Not Applicable or Not Yet Shipped. Select OFF to process incoming change orders manually.	<input type="radio"/> ON <input checked="" type="radio"/> OFF

### **Email Address**

Suppliers can enter an email address and choose to be automatically notified when new purchase orders or change orders have arrived.

This field is required if Auto Notification is set to ON or Receive Change Order is set to ON + Automatic email notification.

### **Email Notification Regional Settings**

Locale settings that affect your email notifications only.

Choose a value for Country, Language and Time Zone.

### **Auto Notification**

Supplier can enable automatic email notifications about incoming orders.

### **Order Notification Interval**

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

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

## FAQs

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

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

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

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

### 3. How can obtain help on using this tool?

Contact Supplier Support for further assistance by either:

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

Phone – 866-889-8533

Email – [SupplierSupport@perfect.com](mailto:SupplierSupport@perfect.com)