User Guide
Supplier Order Management 3.5

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Introduction

Commerce One Supplier Order Management 3.5 offers a significantly streamlined and easy-to-use User Interface and includes the following new features:

- Enhanced User Role Security
- Change Order History
- Net Change Order Processing
- Blanket Order Release Support
- Selected Item Export to ASN and Invoice

Supplier Order Management 3.5 supports xCBL 3.5. For full functionality, buyers should be using an application such as Commerce One's Procurement application. However, Supplier Order Management transacts with any Commerce One or third-party procurement or invoice application.

The Supplier Order Management graphical user interface contains the following modules. All Supplier Order Management modules include online help.

Module	Description	New in 3.5
Invoice Management	Create, submit and manage invoices on the Web. Major features include: • Create invoices from imported orders or buyer data • Send invoices for partial or multiple orders	• Import selected line items into new or existing invoice • Create invoice from blanket purchase order release • Multiple item taxes • Extended price for subtotal and line items • Create XML version of invoice
Advance Ship Notice	Send advance ship notice to buyers that goods have been or will be shipped on a specific date. Major features include: • Create advance ship notices from existing orders or buyer data • Send advance ship notices for partial or multiple orders	• Import selected line items into new or existing advance ship notice • Create advance ship notice from blanket order release • Create XML version of advance ship notice

	• Send multiple advance ship notices for different stages of shipment	
Order Management	Manage purchase orders, change orders and cancellations. Major features include: • Change orders • Blanket orders • Order, shipment and payment status • Individual line item updates • Split line item quantity • Multiple, optional order responses to buyer • Order response history • Change order history • Export orders or selected items to create invoices and advance ship notices • Enhanced Smart Form display	• Export selected line items • Change order history • Process net change orders • Blanket order support • Create XML version of order, change order, or order response

The following modules are for Pantellos administrators only.

Module	Description	New in 3.5
User Preferences	Modify account and other Supplier Order Management settings. Major features include: • Email notice of incoming orders • Auto validation of price and availability • Automatic order processing (accept or reject) • Customized change order treatment (receive for processing or reject) • Auto accept cancel orders	• Items Displayed setting for list pages • Maximum display number for Account Codes menus • Email regional settings • Infinite availability setting moved to Catalog Publisher

Account Management	Manage buyer accounts and account codes. Major features include: • Link accounts to price catalogs • Set Supplier Order Management user roles to access specific account codes	• Link account code access to user roles • Create contract number for a blanket order agreement

Icons and Symbols

Supplier Order Management uses the following symbols:

Icon	Description
*** Field Name**	Asterisk and red text indicate a required field.
Order Management only	
📎	Order in this row includes an attachment (multimedia file, etc.). To download attachment, open the order (click View icon), expand Attachments section and click the Download link.
!	Indicates that order has one or more of the following errors (specific error details display when you view the order): • Contract ID or account code in order does not exist in supplier database • price or quantity discrepancy If auto validation is on, Supplier Order Management runs price and availability checks on incoming orders. Any order with a discrepancy between buyer and supplier is flagged. (If auto validation is off, it is up to the supplier to check for price and availability errors. The flag still displays on the list pages if there is an account code or contract ID discrepancy.) For further information, see the Order Management online help.

Supplier Order Management uses the following action icons:

Click this...	To do this...
	• (Details) Show detailed information for a page section or a list item. Either a new page or an expanded section displays. • (Collapse Details) Hide details for a page section or a list item.
	Toggle ascending or descending sort order on a list page. To activate sort arrows, click a column header to sort by that header. (Clicking the header also toggles the sort order.) For example, on the Purchase Order List Page in Order Management, click the header Order Number to sort the listed orders by number. A sort arrow appears in that column only.
	Open the Search Account Codes dialog box to search on a full or partial account code string.
	Edit current document or item, such as invoice in list or current Account Code (Account Management).
	View current document or item. In Order Management this icon also represents the Edit (or Process) action.
	Print current document as a PDF.
	Permanently delete current document or item, such as an advance ship notice or invoice, or a Contract Number (Account Management).
	Select current item and perform associated action. Some examples are: • Create new invoice or advance ship notice based on this buyer's information. • Add new account code for this buyer (Account Management). • Select account code to use as Search filter.
	Create XML version of current document. XML contains all stored data, including what does not appear in your user interface.
	Import selected order(s) or line items into current advance ship notice or invoice. Opens Order Management.
	Send current document to buyer.
	Close current document or page, discarding unsaved changes.

Order Management only	
	Display pending change order for current purchase order in list. Does not display if there are no pending change orders for current order.
	Display history of all activity for current order in list: original order, change orders, and order responses.
Invoice Management only	
	Save (and add) this new tax to current invoice item.

Navigation

Supplier Order Management pages may display lists too long to be viewed at once. In most modules, 10 items display per list page by default. Your administrator can set certain modules to display up to 50 items per page.

The arrow navigation buttons allow you to move forward or back one page at a time (next or previous page), or to jump immediately to the first or last page:

Click this...	To do this...
	Go to the first page.
	Go to the last page.
	Go to the previous page.
	Go to the next page.

The list total (for example, **Displaying 1-10/23**) shows the number of items displayed on the current page, and the total number of items in the list. The page location (**Page x/y**) shows what page you are on and the total number of pages in the list. To jump to a specific page number, enter the number and click Go. Otherwise, use the page navigation buttons.

Remember to save new changes before moving to another page or module.
Use the controls and menus on the Supplier Order Management pages to navigate. Use your regular browser controls (such as Back and Forward buttons) as little as possible, particularly in Netscape.

Supplier Order Management Moduals

The module selection bar appears in your web browser window at the top of all main Supplier Order Management pages. It includes the following links:

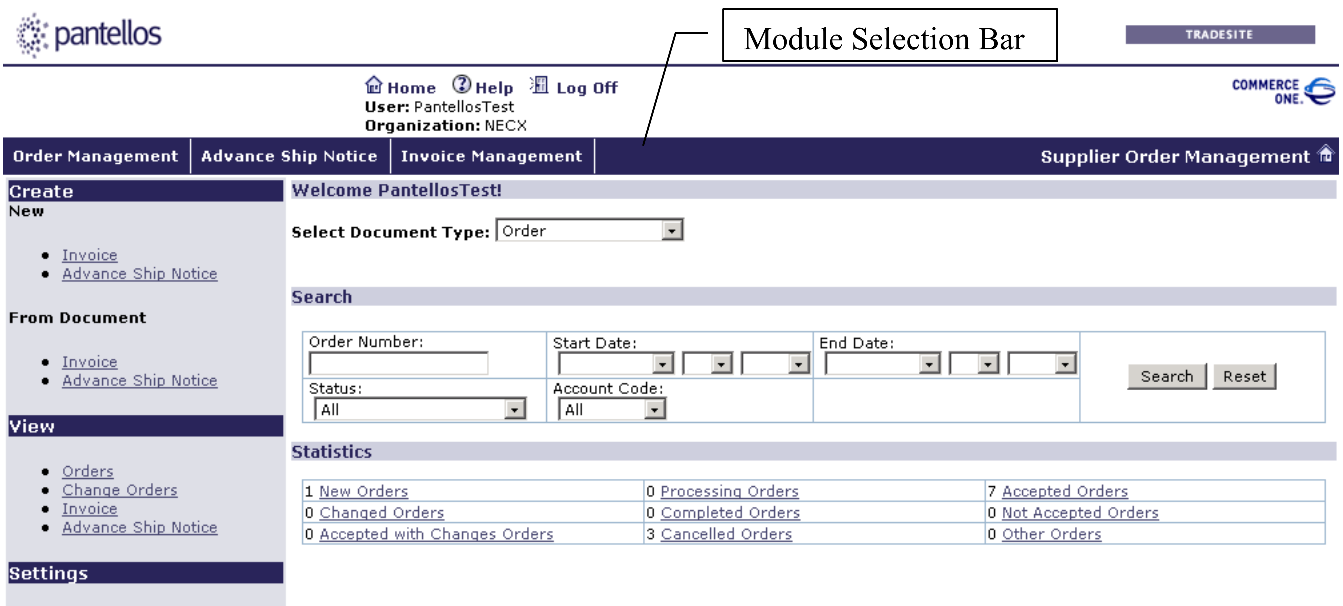
Order Management | Advance Ship Notice | Invoice Management

In addition, you may access the Supplier Order Management Home Page at any time by clicking the right hand link in the module selection bar.

Order Management

Once you have logged in at www.pantellos.com, you will be redirected to the Supplier Order Management 3.5 home page.

Home Page



Statistics

From the Supplier Order Management home page you can access all of your purchase orders for processing. As in Supply Order 3.1, you can click on any status link under Statistics for a list of all orders with that status. For a complete list of Orders, Change Orders, Invoices, or Advance Ship Notices, click the appropriate link located in the View section of the menu on the left.

Search

From the Home Page, as well as any List Page, you may search for documents based on document number (such as Order or Invoice Number), date, status, type, and buyer account code. You may also search for invoices and advance ship notices by the order numbers they reference.

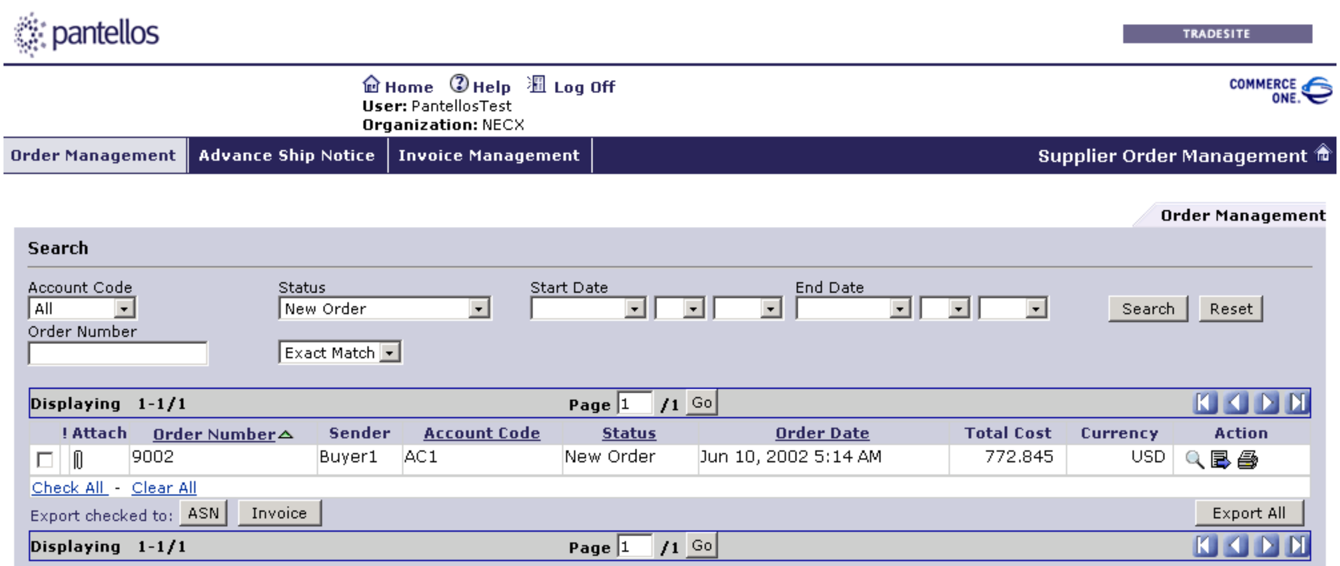
First, set Select Document Type to the document you are searching on:

- Order (default)
- Change Order
- Invoice
- Advance Ship Notice

Search fields and Statistics links and data vary depending on the selected Document Type.

After selecting your Search criteria, click Search to display the results on the associated module's list page.

Purchase Order List Page



The Purchase Order List page displays the results of your search. From here you can export a PO to Invoice or ASN.

Export Purchase Order to Invoice or Advance Ship Notice

1. Start on the Purchase Order List page.
2. Check the box at far left next to one or more orders that you want to export. You can also Check All - Clear All selections to export all displayed orders.
3. Click Invoice or ASN button. The Invoice Management or Advance Ship Notice module opens.
4. Complete the invoice or advance ship notice on the edit page for that module.

Note: You can export a purchase order to an advance ship notice with a change order pending as long as the original purchase order has been accepted.

View Single Order

Use the Purchase Order List Page to view details of a single order.

To view detailed information for a single order:

1. Start on the Purchase Order List page.
2. Click the view icon (magnifying glass) under Action in the purchase order row. The Purchase Order page opens, displaying the Order Header and information for the selected order. This is where you process orders.
3. Click the Details button (+ sign and arrow) next to the line item to display line item information.

Export Orders in XML

To save the data to your own system, you need to download, or export, a copy of the purchase or change orders for further off-line processing. You can export copies of all displayed purchase or change orders, or a selected order.

Do one of the following:

1. On the Purchase Order List page, click the Export icon (page with arrow) in the order row.
   -or-
2. On the Purchase Order page click the Export button at the top of the page. The Export dialog box displays.
   -then-
3. Select XML from the Export format menu, and click Export.
4. The selected purchase order displays in a new browser window in XML format.
5. Select File | Save As to save the file to your computer. Save the file with a htm or txt file extension.

Print Orders

In Supplier Order Management, you can print to a PDF file. You can also easily print purchase and change orders from your browser.

You can preview and print copies of either all displayed purchase or change orders or a selected order. Order Management uses the Adobe PDF format to print orders.
You need a PDF viewer (Adobe Acrobat Reader) to print orders.

1. To create a single purchase or change order report, click the print icon in the desired order row on the Purchase Order List page or Change Order List page.
2. The order displays as a PDF file in Adobe Acrobat.
3. Select File | Print.
4. Complete the Print dialog box.
5. Leave the default Paper Size (Letter) or select a size from the pulldown menu.
6. Click Print to print the selected order.

We strongly recommend that you use Internet Explorer 5.

If you use Internet Explorer version 4.x, you need to disable Adobe Acrobat's web browser integration to display the PDF file.

To disable Acrobat's browser integration:

1. Start Adobe Acrobat 4.
2. Go to File | Preferences | General.
3. Uncheck the Web browser integration option.

Purchase Order Page

pantellos

TRADESITE

Home Help Log Off
User: PantellosTest
Organization: NECX

COMMERCE ONE.

Order Management | Advance Ship Notice | Invoice Management | Supplier Order Management

Order Management

Export | History | Send Document | Save Header

Purchase Order : 50-239

BILL to / SHIP to / BUYER Info

Buyer:	Bill To:	Ship To:
Executive SampleCatalog Productions 7200 Southwind Circle Richmond, USCA 12345-6789 US	SampleCatalog Productions 7200 Southwind Circle Richmond, USCA 12345-6789 US	SampleCatalog Productions 7200 Southwind Circle Richmond, USCA 12345-6789 US
Buyer Order Contact:	**Billing Order Contact:**	**Shipping Order Contact:**
Order Contact: Jerry Sample Contact ID: Telephone: (555) 941-6000 Email: Jerry.Sample@SampleCatalog.com Fax: (925) 941-6060	Order Contact: Jerry Sample Contact ID: Telephone: (555) 941-4300 Email: Jerry.Sample@SampleCatalog.com Fax: (555) 941-4301	Order Contact: Jerry Sample Contact ID: Telephone: (555) 941-4300 Email: Jerry.Sample@SampleCatalog.com Fax: (555) 941-4301

General Information

Order Date	Account Code	Buyer Ship By Date:	Currency:
Jun 10, 2002 1:44 PM	AC1	Jun 10, 2002 1:44 PM	U.S. Dollar
AllowPartial Shipment:	Requested Delivery Date:		
No	Jun 25, 2002 1:44 PM		

Supplier Ref. No.: 345345345

Supplier Ship By Date: 2002 / June / 10

Status: New Order

Payment Choice: Not Applicable

Shipment Choice: Not Applicable

Note To Buyer:

Displaying 1-1/1 **Page** 1 **/1** Go

	Export	Number	Code	Description	Unit	Quantity	Unit Price	Amount	Action
	☐	1	125883	AHA-8920 PCI 1394 KIT	Each	1.000	235.950 U.S. Dollar	235.950	

Export checked to: ASN | Invoice

Sub Total for displayed line items:	235.950 U.S. Dollar
Tax Total for the Order:	0.000 U.S. Dollar
Total Amount for the Order:	**238.900 U.S. Dollar**

Displaying 1-1/1 **Page** 1 **/1** Go

Tax Information

Attachments

Payment Information

Terms of Delivery

Transport Information

Notes

General Notes:

Special Handling Notes:

Update Orders

1. Enter the Supplier Reference Number.
2. Select a status from the Status drop-down menu.
3. Update Payment Choice and Shipment Choice as needed from the dropdown menus.
4. Click the Send Document button to save changes and send an order response to the buyer.

Note: Only the Supplier Reference Number, and Status are required. The supplier reference number is the number you manually assign to this order, to be used within your system.

Accept with Changes

Instead of rejecting a purchase order, a supplier can Accept with Changes. In general, if you make any material changes to the buyer's purchase order, such as Supplier Price or Available Quantity, be sure to select the Accepted with Changes status at the header level.

1. Start on the Purchase Order List page.
2. Click the view icon (magnifying glass) in the action area of an order to display the Order Header on the Purchase Order page.
3. Click the edit icon (paper and pencil) next to the line item you want to change.
4. The Line Item Edit Section page opens.
5. Enter the desired change in the Supplier Price, Available Quantity and/or Ship by Date fields.
6. Update Payment Choice and Shipment Choice as needed from the dropdown menus.
7. Update Status to Accepted with Changes at the line item level.
8. Click the Save button to save your changes.
9. Click the Back to PO button to return to the Purchase Order page.
10. Enter a Supplier Ref. No. The supplier reference number is the number you manually assign to this order, to be used within your system.
11. In the Note to Buyer field, enter any further changes to the order.
12. Click the Save Header button to update your local copy. You can go back and make further changes as needed.
13. Click the Send Document button to save changes and send an order response to the buyer.

In general, you should select Accept with Changes at the header level when you wish to make any changes to an order. As soon as you Accept with Changes, your updated order becomes the valid order. You then send the buyer the order response. If the buyer approves, they do not need to respond. No response implies acceptance, depending on the supplier-buyer agreement.

If the buyer does not agree with your proposed changes, they can:

- Initiate a change order request proposing further changes.
- Send a new purchase order.
- Cancel the order with a change order request for cancellation.

Update Line Item

You can update an individual line item's order status, payment status, supplier price and available quantity. You can also add shipment detail which allows you to break the item down into subquantities and update shipment status or schedule delivery for each subquantity.

Note: If Supplier Price and Available Quantity are the only editable fields, the purchase order may have originated from BuySite 6.1.1. Ship By Date, Item Status, Shipment Status and payment status are not available for Purchase Orders originating from this application.

1. Start on the Purchase Order List page.
2. Click the view icon (magnifying glass) in the Action area for the order you are processing. The Purchase Order page displays all information for that order.
3. Scroll to the desired line item.
4. Make sure you save any changes before moving to the Line Item Edit page.
5. Click the edit icon (paper and pencil) next to the line item you want to update. The Line Item Edit Section page displays.
6. Update the following fields as necessary:

    - Status: Select the status of this line item from the dropdown menu. The line item Status is the equivalent of the order Status in the order header, and contains the same list of choices.
    - Payment: Select the payment status for the line item from the dropdown menu.
    - Supplier Price: Enter the supplier price in this field.
    - Available Quantity: Enter the quantity available.

    The 'Available Quantity' does not need to match the buyer requested quantity. However, if the buyer requests 100 items and you only enter that 60 are available, the other 40 will be automatically rejected. If you want to indicate that the remaining items will be shipped on a different date, use the 'Add Shipment Detail' link to enter additional 'Available Quantity' 'Ship by Date' and shipment statuses for the remaining subquantity or subquantities. You can split the line item into multiple shipment details for multiple subquantities.

- Ship By Date: Enter the date when you will ship the line item or subquantity.
- Shipment: Enter the shipment status for the line item or subquantity.
- Notes: Enter any additional information you want to communicate to the buyer about this line item.

7. Click the Save button to save your line item updates in your local copy.
8. Click the Back to PO to return to the Purchase Order page.
9. Make any further updates as needed in the order header.
10. Click the Save Header button.
11. Click the Send Document to send the order response.

The Send Document button saves your changes and sends an order response to the buyer. The Order Status as well as the shipment and payment statuses in the order header are independent of their corresponding line item statuses. This can be a very useful feature. However, you need to be careful about using different shipment statuses at the header and line item levels.

When you set a purchase order's status to Accepted with Changes, you can change the Supplier Price and/or Available Quantity for line items. This is also true when you respond to a buyer's change order request with Accepted with Changes.
Although it is possible to change Supplier Price and Available Quantity when you update an order status to Accepted, we strongly advise that you use the Accepted with Changes status at the header level for any material changes to the original purchase order.

Split Quantity

Split quantity allows you to split the quantity of a line item, as many times as you want, then update the subquantities as necessary. You can send the updates to the buyer as an order response.

The most likely reason to use this feature is when only part of the requested quantity is available.

If the Add Shipment Detail split quantity link is not available on the Line Item Edit Section page, the purchase order may have originated from BuySite 6.1.1. The split quantity action is not available for Purchase Orders originating from this application. Each subquantity includes its own set of fields: Available Quantity, Ship by Date, Shipment Status and a Notes field.

Split Quantity Example

The buyer's requested Quantity is 100. Your current inventory of items is 60.
To use the split quantity feature to process this example order:

1. Start on the Purchase Order page.
2. Click the edit icon (paper and pencil) next to the line item you wish to split.
3. Enter 60 in the Available Quantity field for this line item.
4. Complete any other fields as necessary:
    - Ship By Date: Enter the date when you will ship the available quantity
    - Shipment: Enter the shipment status for the subquantity.
    - Notes: Enter any additional information you want to communicate to the buyer about this subquantity.
5. Click the Add Shipment Detail link.
6. Enter 40 in the Available Quantity field for the second subquantity.
7. Fill in Ship by Date and Shipment status.
8. Enter Notes as needed.
9. Click the Save button to save your changes.
10. Click the Back to PO button to return to the Purchase Order page.
11. Make any further updates as needed in the order header.
12. Click the Save Header button.
13. Click the Send Document to send the order response.

The 'Available Quantity' does not need to match the buyer requested quantity. However, if the buyer requests 100 items and you enter that 60 are available, the other 40 will be automatically rejected. If you want to indicate that the remaining items will be shipped on a different date, use the Add Shipment Detail link to enter additional 'Available Quantity' 'Ship by Date' and shipment statuses for the remaining subquantity or subquantities. You can split the line item into multiple shipment details for multiple subquantities.

Email Notice

Depending on how your system is configured, you receive email in three cases:

- When a purchase order arrives.
- When a change order arrives.
- When you have not processed a purchase order within a certain number of days.

To setup email notification, please contact Pantellos Support at 877.777.4888.

Process Blanket Orders

A blanket purchase order can be viewed as a simple contract. It has terms and conditions defined between buyers and suppliers. The terms and conditions usually relate to specific pricing, specific time periods for this condition, total order quantity or dollar value within a time period, or how and when specific orders are released from this blanket purchase order.

Specific orders that are created based on the blanket purchase order are called releases from the blanket Purchase Order and are defined for one supplier only.

1. Start on the The Purchase Order List page.
2. Click the view icon (magnifying glass) in the Action area to open the blanket order.

   The Blanket Order page opens. The release number and Contract ID will display in the Order Header. Only certain header fields can be edited for blanket orders. No line item changes are permitted.

   Select Accepted or Not Accepted from the Status dropdown menu.
3. Click Save Header.
4. Click Send Document to send a response to the buyer.

Smart Forms and Attachments

Buyers use Smart Forms and attachments to provide additional information with an order, such as specifications for a customized product or instructions for a service request.

When a purchase order contains Smart Form data, a Smart Form link displays in the Order Header and Order Detail sections of the Purchase Order page.

To view Smart Form data:

1. Start on the Purchase Order List page.
2. Click the view icon (magnifying glass) in the Action area to open the order.
3. Click the Smart Form link to view the data in a new browser screen, in HTML format.

To view an attachment:

1. Start on the Purchase Order List page.
2. A paper clip icon will appear if the order has an attachment.
3. Click the view icon (magnifying glass) in the action area to open the order.
4. Scroll to the Attachments section and click on the Details icon (+ sign and arrow) to expand this section.
5. Click on the Download hyperlink to display the attachment.
6. A Smart Form is an extensible form that links to the items and services in a catalog. A supplier may require Smart Forms with certain catalog items. With Supplier Order Management 3.5, the Smart Form is actually part of the purchase order and not a separate attachment. Smart Forms work in third-party applications using CBL01. As long as the buyer can add the Smart Form data to the order, the supplier should be able to view it.

Advance Ship Notice

The Advance Ship Notice module in Supplier Order Management enables suppliers to create and manage advance ship notices online through their e-marketplace home page. As a supplier, you may create a blank advance ship notice from basic buyer information, from one or more existing orders (including blanket order releases) or from selected line items in an order. You can also import order data such as line items into an existing advance ship notice.

Basic Rules

There are several rules to keep in mind when creating and editing advance ship notices, and when importing from Order Management.

- **Order status**
  You may import orders with any order status except Not Accepted or Cancelled.
  You cannot import change orders. A change order is not a valid order, but a temporary stage in the order cycle. As soon as a change order is accepted by the supplier, it becomes the current, valid purchase order. It can now be used for a new or existing advance ship notice.

  However, you **can** import a purchase order for which there is a pending change order as long as the original order has been accepted (that is, you can import the original order, not the pending change order).

- **Order type**
  An advance ship notice may contain regular Purchase Orders, (releases from) Blanket Orders, or a mix of both. If an order has a Release Number, it is a blanket order release. In addition, you may import multiple releases (that is, with different release numbers) from one or more blanket orders.

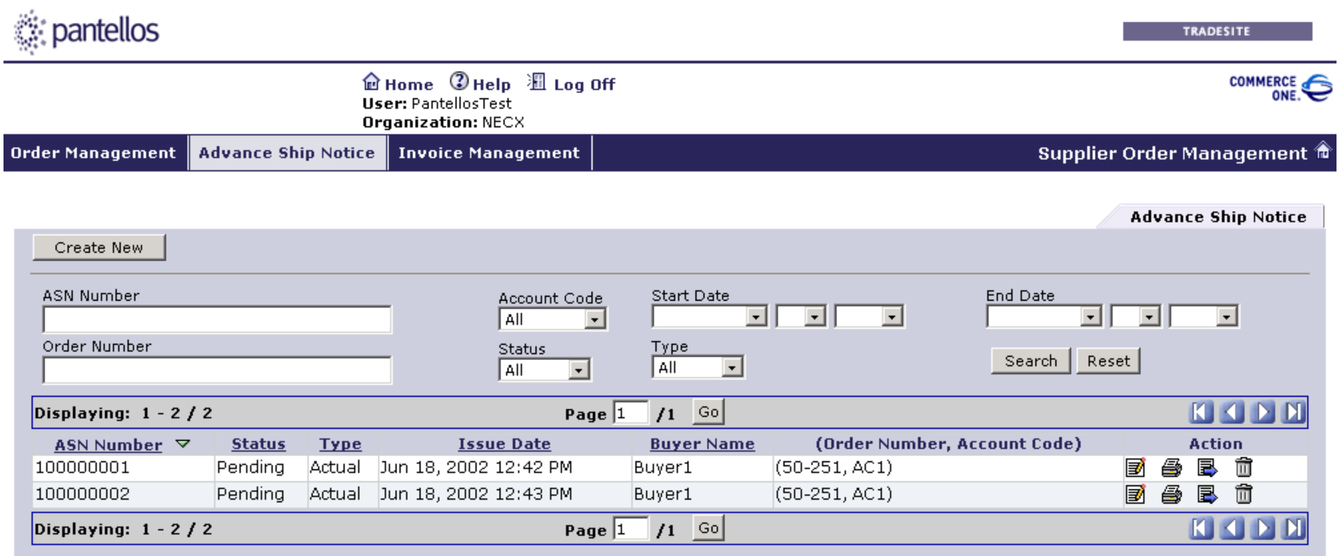
  For a definition of blanket order, see the Order Management online help, or the online help Overview: Glossary.

- **One buyer**
  An advance ship notice may contain multiple account codes, but they must be for the same buyer. All orders and items selected for import must have the same buyer. If importing into an existing advance ship notice, the buyer for the imported order data must match the advance ship notice buyer.

- **Changed orders**
  If an order is changed **after** you import data, the advance ship notice does not reflect the change (such as a canceled order or item). You need to delete or

edit the items manually, or create a new advance ship notice. Keep this in mind if you import a purchase order with a pending change order.

Advance Ship Notice List Page



Import Orders

Use the Create From Document menu on the Supplier Order Management Home Page to create an advance ship notice from one or more purchase orders.

Use the Import link on the Advance Ship Notice Page to import orders into an existing advance ship notice, and follow the steps below. For information on importing individual line items, see Import Order Line Items.

Line items in an advance ship notice may come from different orders. The original line item numbers (from the original order) display in the advance ship notice Line Item Number field.

The header information from the **first** imported order is used in the new advance ship notice. Supplier Order Management then verifies that all remaining imported orders have the same account code. If they do not, an error displays.

When you import order data into an **existing** advance ship notice, only the line item level information is updated. The header information remains unchanged.

Important: Be careful not to mistakenly import the same order or line items into an advance ship notice. Supplier Order Management does not flag duplicate data.

You may create an advance ship notice from regular purchase orders or blanket orders (orders periodically released from a blanket order or contract).

Create Advance Ship Notice

1. On the Supplier Order Management Home Page, click Advance Ship Notice in the Create From Document menu. The Order Management module displays.
2. Set the Search options to find the order(s) you want, and click Search. For details, see the Order Management online help.

   Keep in mind the Basic Rules, such as order type and one buyer.

3. On the Purchase Order List page, use the checkboxes in the first column to select orders for export.

   Important: You may import up to 10 orders at a time, selecting only from the current page of the list (rather than from different pages).

4. Click the (Export checked to) ASN button.

   A confirmation page allows you to review the selected orders. If only you are only importing one order, line item detail is included.

5. Click Export (or Cancel to cancel the export). The new advance ship notice displays, populated with the imported order data.

   Note: The advance ship notice is now in your e-marketplace database. If you decide you do not want it, you must delete it (see Delete ASNs).

6. Complete the advance ship notice, especially the required fields on each tab (asterisk and red text).
7. Save before moving to each next tab, or your edits will be discarded.
8. Click Send (or click Close after the final save to return to the Advance Ship Notice List Page). If transmission fails, click Send again until it succeeds, or correctly complete invalid or missing fields.

Import Order Line Items

You can only import selected items from one order at a time. To import selected items from more than one order, you may select the orders you want, export to ASN, then delete the unwanted items manually. Or you may follow the process below.

1. Do one of the following:
   - On the Supplier Order Management Home Page, click Advance Ship Notice in the (Create) From Document menu.
   - On the Advance Ship Notice Page for an existing document, click Import.

   The Order Management module opens.

2. Use the Search options to find the order you want, and click Search. (For details, see the Order Management online help.)

   The Purchase Order List Page displays.

3. Click the View icon for an order from which you want to import specific items. The Purchase Order Page displays.
4. Scroll down to the line items just under Note to Buyer. In the Export column, check the items you want to export to your advance ship notice.
5. Click the (Export checked to) ASN button. A confirmation page displays, listing the items you checked.
6. Click Export (or Cancel to cancel the export).

   The Advance Ship Notice Page displays, with multiple fields already populated.

   Note: Once you confirm the export for a new advance ship notice, it is added to your e-marketplace database. If you decide you do not want it, you must delete it.
7. If you want to import more selected items from another order into this advance ship notice, click Import, and follow the steps above to select and import those items.
8. Complete the advance ship notice.

   Make sure you complete all required fields (asterisk and red text). If any are empty or filled out incorrectly, they are flagged when you try to save or send.

9. Click Save before moving to each next tab, or changes will be discarded.
10. After reviewing the advance ship notice and saving, click Send if it is ready to send to the buyer (or click Close to go to the Advance Ship Notice List Page). If transmission fails, click Send again until it succeeds.

Edit Advance Ship Notice

1. Click the Edit icon for the advance ship notice you want to modify.

   The Advance Ship Notice Page displays.

2. As you edit, click Save before moving to each next tab. If any required fields have invalid or missing data, the fields are flagged for correction.
3. Click Import to import existing orders or line items from Order Management. (See Import Orders, Import Order Line Items, and Basic Rules.)
4. Use Add Item on each tab to:
   - **Item** - Add a line item. The line item section expands to display additional fields. When adding and deleting items, remember that an advance ship notice must have at least one line item.
   - **Package** - Add a new package, with packaging information.
   - **Transport** - Add a new set of transport information, such as route ID, carrier, and end location.
   - **Charge** - Add a new set of charges or allowances.
5. Click the Delete icon in an item's Action column (Item tab) to delete it from the advance ship notice.
6. Save your final changes.
7. Click Send if you are ready to send the advance ship notice to the buyer, or click Close to return to the Advance Ship Notice List Page.

Send Advance Ship Notice

You may send an advance ship notice at any time: before a shipment, just as it goes out, or after. For instance, you may create an Actual advance ship notice, then keep it in Pending status and continue importing additional orders or line items as they become available, until you are ready to send the document and the shipment.

You can also resend a Sent document as many times as you wish. You may want to resend if, for instance, you need to change some scheduling information or correct an error.

To send an advance ship notice, click Send on the Advance Ship Notice Page.

Print Advance Ship Notice

Before printing an advance ship notice, Supplier Order Management validates the document. Therefore, make sure that all fields are correctly completed. Your administrator and Commerce One can customize the display and printout according to supplier needs.

To print an advance ship notice from the Advance Ship Notice List Page, click the Print icon in the Action column for that advance ship notice. To print an advance ship notice from the Advance Ship Notice Page, click Print in the menu bar. Depending on your browser configuration, the advance ship notice displays as a PDF in Acrobat or in another browser window.

You may also print the advance ship notice simply by using your browser's basic print features, such as Print on the File menu.

Invoice Management

The Invoice Management module in Supplier Order Management enables suppliers to create and manage invoices online, handling a wide variety of billing through their e-marketplace home page.

As a supplier, you may create a blank invoice from basic buyer information, from one or more existing orders (including blanket order releases) or from selected line items in an order. You can also import order data such as line items into an existing invoice.

Invoice Management performs some automatic calculations, such as the Subtotal and Total. You are responsible for determining other amounts as needed, including tax, freight, additional charges and allowances. Once you enter them manually, these amounts are incorporated in the the automatic calculation.

Basic Rules

Remember these easy rules when creating and editing invoices, and importing from Order Management.

- **Order Status**
  You may import orders with any order status except Cancelled and Not Accepted.

  You cannot import change orders. A change order is not a valid purchase order, but a temporary stage in the order cycle. Once a change order is accepted, it becomes the current, valid order. You can use it for new or existing invoices.

  However, you **can** import a purchase order with a pending change order (that is, you can import the original order, not the pending change order), if the order status is Accepted.

- **One Order Type**
  If you are importing order data into new or existing invoices, the orders must all be of the same order type: either regular Purchase Order or Blanket Order.

  If an order has a Release Number, it is a blanket order release. An invoice may have only **a single** blanket order Release Number. You cannot create an invoice for multiple blanket orders with different release numbers, or for multiple releases from the same blanket order.

  However, it is possible for an invoice to reference multiple blanket orders if the release numbers are identical (as long as the account code and currency are also the same).

- **One Account Code**
  An invoice may have only one account code, and thus one buyer and invoice destination. This strict validation avoids billing problems. If you are creating invoices against multiple orders with multiple account codes, you must create at least one invoice per account code, even if they are for the same buyer.

  All orders and items selected for export to an invoice are validated to make sure they share the same account code. If you are importing into an existing invoice, the imported account code must match the invoice account code.

  Note: When selecting orders or items in Order Management, you may want to search on a buyer's account code(s) to find all purchase orders listed under each account.

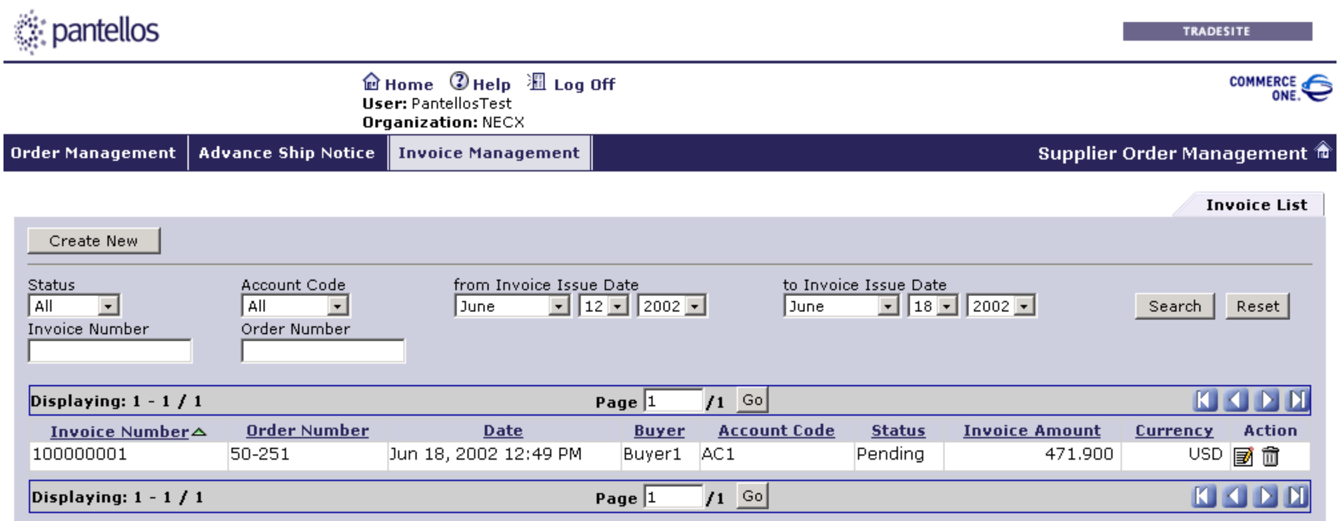
- **One Currency**
  An invoice may have only one currency. If you import from multiple orders in Order Management to create an invoice, the **first** order (or selected line item from an order) determines the currency for the entire invoice. If the currency for subsequent orders differs from the first, the export will fail.

  A new blank invoice uses the supplier's default currency.

- **One Line Item Minimum**
  Every invoice must have at least one line item, whether you import from Order Management or create a blank invoice based on a buyer selected from your existing Buyer List. To add a line item, click the Add Line Item link on the Invoice Page Main tab, or click Import to import orders or line items from Order Management into the existing invoice.

- **Changed Orders**
  If an order is changed **after** you import data, the invoice does not reflect the change (such as a canceled order or item). You need to delete or edit items manually, or create a new invoice. Keep this in mind if you import a purchase order with a pending change order.

Invoice List Page



Import Orders

Use the Create From Document menu on the Supplier Order Management Home Page to create an invoice from one or more purchase orders.

Use the Import link on the Invoice Page to import orders into an existing invoice, and follow the steps below. For information on importing individual items, see Import Order Line Items.

Purchase order numbers appear in the line item information.

When you import order data into an **existing** invoice, only the line item level information is updated. The header information remains unchanged.

When you import multiple orders from Order Management to create an invoice, the bill-to, ship-to, and supplier address information is taken from the **first** order. The same is true of payment information such as Net Days Due.

You may create an invoice from normal purchase orders and blanket orders (orders periodically released from a blanket order or contract).

Create Invoice

1. On the Supplier Order Management Home Page, click Invoice in the Create From Document menu. The Order Management module displays.
2. Set the Search options to find the order(s) you want, and click Search. (For details, see your Order Management online help.)

   Remember the Basic Rules. Since all imported orders must have the same account code, you may want to select a single Account Code to search on.

3. On the Purchase Order List page, use the checkboxes in the first column to select orders for export to the invoice.

   Important: You may select and export orders on the current page only (rather than from different pages of the list). You may export as many orders as are displayed on a single page.

4. Click the (Export checked to) Invoice button.

   A confirmation page allows you to review the selected orders. If you have only selected one order for export, the line items are listed.

5. Click Confirm (or Back to cancel the export). The new invoice displays, populated with the imported order data.
6. Fill in the new invoice, making sure you correctly complete all required fields, marked by an asterisk.

   You may edit the auto-generated Invoice Number to conform to your system. Invoice Management verifies that each invoice number is unique. If it is not, an error displays.

   For details, see Edit Invoices.

7. Save your changes.
8. Click Send if you are ready to send the invoice. (Make sure you have saved all changes.) If transmission fails, click Send again until it succeeds, or correctly complete invalid or missing fields.

Import Order Line Items

1. On the Supplier Order Management Home Page, click Invoice in the (Create) From Document menu. The Order Management module opens.
2. Use the Search options to find the order(s) you want, and click Search. (For details, see the Order Management online help.)

   The Purchase Order List Page displays.

3. Click the View icon (magnifying glass) for an order from which you want to import specific items. The Purchase Order Page displays.
4. Scroll down to the line item(s) just under Note to Buyer. In the Export column, check the items you want to export to your invoice.
5. Click the (Export checked to) Invoice button. A confirmation page displays, listing the items you checked.
6. Click Export (or Cancel to cancel the export).

   The Invoice Page displays, with multiple fields already populated.

   Note: Once you confirm the export, the invoice is created and permanently added to your e-marketplace database.

7. Complete the invoice. Click Save to save your changes.

   For details, see Edit Invoices. Make sure you correctly complete all required fields, marked by an asterisk*.

8. After reviewing the invoice and saving, click Send if it is ready to send to the buyer, or click Close to go to the Invoice List Page.

Edit Invoice

Invoices are standalone documents. If any changes are made to a buyer's information in your e-marketplace TPD (Trading Partner Directory), the invoice is not updated. You must make any changes manually.

1. Go to the Supplier Order Management Home Page, and set Document Type to Invoice.

2. Click Pending Invoices in the Statistics area, or enter Search options and click Search.

3. Click the Edit icon for a Pending invoice on the Invoice List Page.

4. Click the tab, Main or Other, you wish to edit. Make sure you correctly complete all required fields.

5. To edit or delete a line item, click the Edit icon in the item's Action column. Make your edits on the Line Item Page, or click Delete to delete the line item.
6. Click Import to import orders or line items from Order Management. (See Import Orders, Import Order Line Items, and Basic Rules.)

7. Make any necessary changes to monetary values (Freight, Charge, or Allowance).

   Note: The Subtotal and Total are calculated automatically when you save your edits to the Line Item Page and the Invoice Page.

8. Save your changes, or Reset to the last saved version.

9. Click Send if you are ready to send the invoice to the buyer.

Send Invoice

When you send a completed invoice, it is routed to the e-marketplace and from there to the buyer. You can send Pending invoices only. You cannot resend, recall, edit or delete Sent invoices.

1. On the Invoice List Page, click the Edit icon for a Pending invoice.

2. Verify that all information is complete and correct on the Invoice Page (and, if necessary, on the individual Line Item Pages).

3. Click Send. If you have not correctly completed all required fields, an error displays.

Print Invoice

Use the Print action on the Invoice List Page and Invoice Page to format and print a Sent invoice as a PDF. You cannot print Pending invoices.

1. Click the Print icon for the invoice.

2. The invoice displays in a separate window in PDF format.

3. Select Print on the File menu of your browser, or print from Acrobat Reader.

4. Click the top right corner to close the window after printing.