Supplier Manual Order Processing
for Hochland SE

For:

Hochland SE

Kemptener Str. 17

88178 Heimenkirch

- hereinafter referred to as Hochland -

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Content

1. General Information

1.1. Purpose of this document

The purpose of this document is to describe the entire area of order processing in Onventis.

1.2. Document information

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1.3. Version history

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1.4. Prerequisites

Before you can start processing an order, some basic prerequisites must be fulfilled. You require the following for order processing:

- Access to the Onventis Supplier Portal: The Onventis Supplier Portal gives you access to your customer's supplier account. Via the Onventis Supplier Portal you centrally maintain your organization master data, manage your users and can create additional supplier accounts for new customers. You log into the Onventis Supplier Portal with a central login (e-mail address) and can open all linked supplier accounts from there. If you do not yet have access to the Onventis Supplier Portal or do not yet have a supplier account, please contact your customer so that he can register for you.

- Supplier account: You can open your supplier account via the Onventis Supplier Portal. This is your own section in Onventis Buyer, which allows you to process orders and upload catalogs.

- Access data: In order to log in to the Onventis Supplier Portal and open your supplier account, you need the corresponding login data. If you do not have these, you can have them sent to you (again) by your customer at any time. See chapter 1.5 Registration in the Onventis Supplier Portal.

  In addition, you can also use the "Reset password" function, which you can access directly via the login screen. Enter your e-mail address there. You will then receive an email with a link to reset your password.

1.5. Registration in the Onventis Supplier Portal

After your customer has created a supplier account, you will receive an e-mail containing a link to set back your password. To add a customer to your portal account or to register your organization in the portal, select the link "Click here". This link will take you to the Onventis Buyer Login. A system message appears initially, which you can use to register in the Onventis Supplier Portal.

The system message on the Onventis Buyer Login page appears:
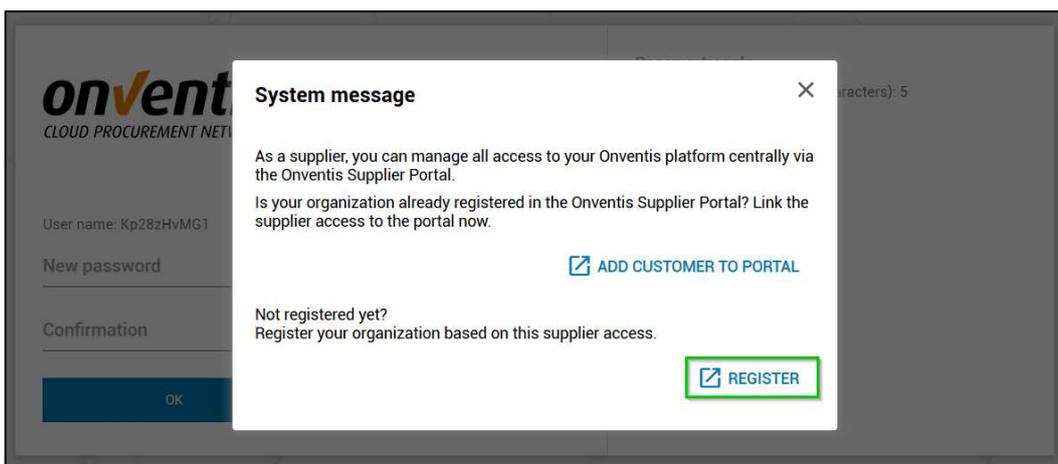
If you create a new access to the portal (button <Register>), you will be automatically identified (registration step 1 "Identification") and forwarded to step 2. In step 2 of the registration, "Personal data", enter all relevant data for creating a personal user account. Mandatory fields are marked with an asterisk (*).

After sending the form data via the button <Create new account> you will receive an e-mail to the address entered in the E-mail (Login) field.

Call up the mail in your mailbox and confirm your e-mail address by clicking the corresponding text link <Confirm e-mail> in the e-mail.

After you have clicked the "Confirm email address" link in the confirmation email, step 3 of the "Email Validation" registration process will automatically appear in your browser. You will receive confirmation that the e-mail address has been validated. Click the <Next> button to proceed to the next step of the registration process.

In an intermediate step, they are asked to authenticate themselves with the previously validated e-mail address and the password specified in step 1.

In step 4, "Company data", enter the company name, address and other data about your company. When the VAT identification number is entered, a check is made as to whether this number is already registered and an automatic duplicate check of the users registered in the portal is carried out. If a company with this number has already registered in the Onventis network, the company cannot be added. A note appears in the input field:

If you still want to continue the registration by clicking the button <Complete registration>, the following dialog allows you to contact the administrator of the existing company account by message:

Confirm the General Terms and Conditions of Use and complete the registration by clicking the corresponding button.

After completion of the registration, you will receive a confirmation by e-mail. You are now officially part of the Onventis Network. In the next steps, you can create additional users in your company and give them access to the Supplier Portal. You can link vendor accounts of other existing customers via customer management and

assign them to your employees. In addition, you can now start maintaining your supplier profile and enrich it with interesting information about your company.

Your Onventis Supplier Portal Registration - Next Steps

Dear Carl Catalogmanager,

Thank you for registering your company for the Onventis Supplier Portal. From now on you will be able to access your Onventis customers on https://supplier-beta.onventis.com.

Your next steps:

1. Complete and publish your Supplier Profile and be found by more than 550 buying organizations on the Onventis Platform.
2. Create user accounts for your coworkers, in order to grant them access to your Onventis customers and the Supplier Profile.
3. Add your company's existing Onventis customer accounts and assign the right users to their accounts, so that you and your coworkers are able to access and manage all your Onventis customers through the Onventis Supplier Portal.

Best regards
Your Onventis team

1.6. Login to the Onventis Supplier Portal and open your supplier account

The login to the Onventis Supplier Portal takes place for all users of the platform via a central entry page: https://supplier.onventis.com/

Tip: Save this link in your favorites list so that you can reach the account quickly at any time for processing orders or catalogues.

By logging in with an e-mail address and the corresponding password, each user access is unique and assigned to a supplier organization. After successful authentication, the user accesses the dashboard of his supplier account.

Please log in to the Onventis Supplier Portal using your email address and your password.

Email
catalogmanager-01@demovendor.com

Password
••••••••

LOGIN

RESET PASSWORD

Is you company not yet registered in the Onventis Supplier Portal?

⬀ LEARN MORE   SIGN UP

After logging in to the OSP, the user is taken to the portal home page, the dashboard. On this dashboard, each user receives an overview of all customers assigned to his user. Users can use these "customer tiles" to jump into the supplier account. The user is automatically authenticated and forwarded to the start page of the respective supplier account without an additional login.
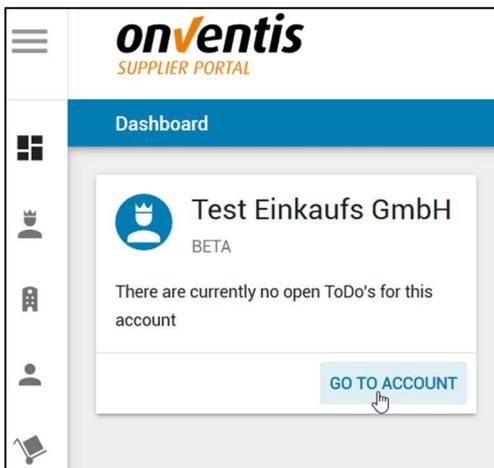
1.7. Password reset

If the password of the access data is no longer known, it can be reset at any time by clicking on the button <Reset password> in the login window.
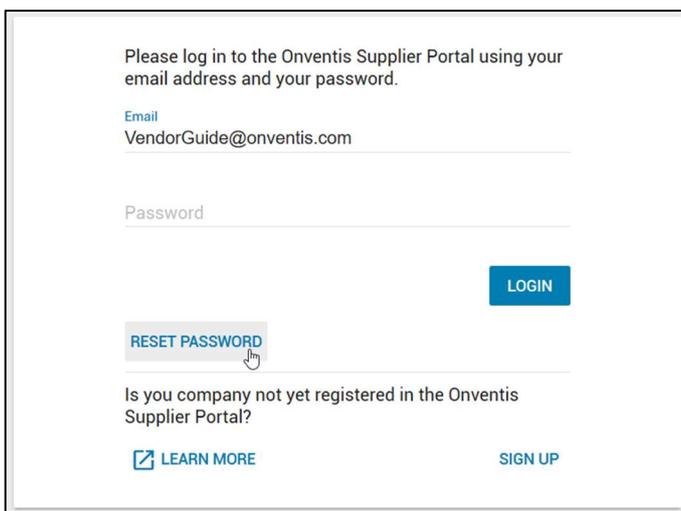
In the following dialog you can enter the e-mail address with which you would like to log in to the portal.
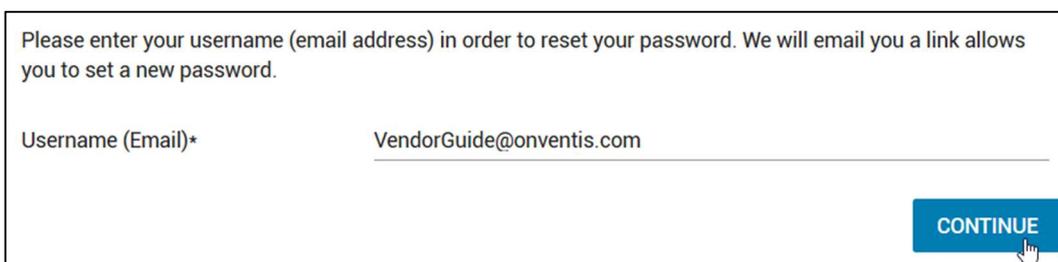
If this e-mail address is known, an e-mail containing a link will be sent to this address. The password can then be reset by clicking on the link in the corresponding e-mail.
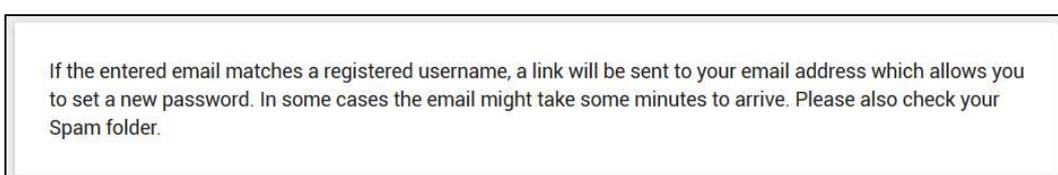
2. order processing

The following chapter provides an overview of the individual steps in order processing: creating and sending an order confirmation, a delivery note and / or creating a performance record.

The order processing process can include various process steps. These are displayed in the "Status" column in the order overview. Depending on the individually defined order processing process, only individual process steps can occur here. The following process steps are possible:

- **OR:**   Order
- **OC:**   Order confirmation
- **DT:**   Delivery ticket
- **LN:**   Performance record
- **RG:**   Receipt goods
- **II:**   Invoice information
- **CA:**   credit advice

Each process step can have a special status:

- **Dark blue:**   Process step completed
- **Light blue:**   Process step must be completed by the customer
- **Orange:**   Process step must be done by yourself

2.1. Overview of orders

In your dashboard you will find the different widgets. Among other things, the to-do list. If you do not see these widgets, please add them using the <+> button at the bottom right of the screen.

Onventis recommends that all users create their own dashboards. Each user must make the settings individually.

The following overview shows the possibilities of the individual widgets of the dashboard:

- o News and announcements
  - o Internal messages to users with relevance to the platform or other internal organizational processes or events.
  - o Integration of guidelines for internal users and suppliers
  - o Integration of further important information such as terms of purchase, terms of use, etc.
- o to-do list
  - o Shortcuts to important procedural processes such as approvals, conditions to be released, and confirmation of order changes or goods receipts, etc.
  - o Increased efficiency as the processes can be processed faster and restricted to the processes to be processed and reduced to a minimum
- o Dates and deadlines
  - o Quick overview of all overdue processes
- o Recently opened documents
  - o Shortcut to the tasks and configurations you last edited
  - o Increase efficiency by quickly finding your way back to the topics you worked on last
- o RSS feeds
  - o Possibility of integrating external information sources for a quick market analysis
- o reports
  - o Possibility of a quick overview of purchasing relevant key figures
  - o Can be integrated multiple times with different reports each time

In the "to-do list" you will find all filtered orders from the respective customer that require confirmation, information or offers that need to be processed. Another widget also shows dates and deadlines.
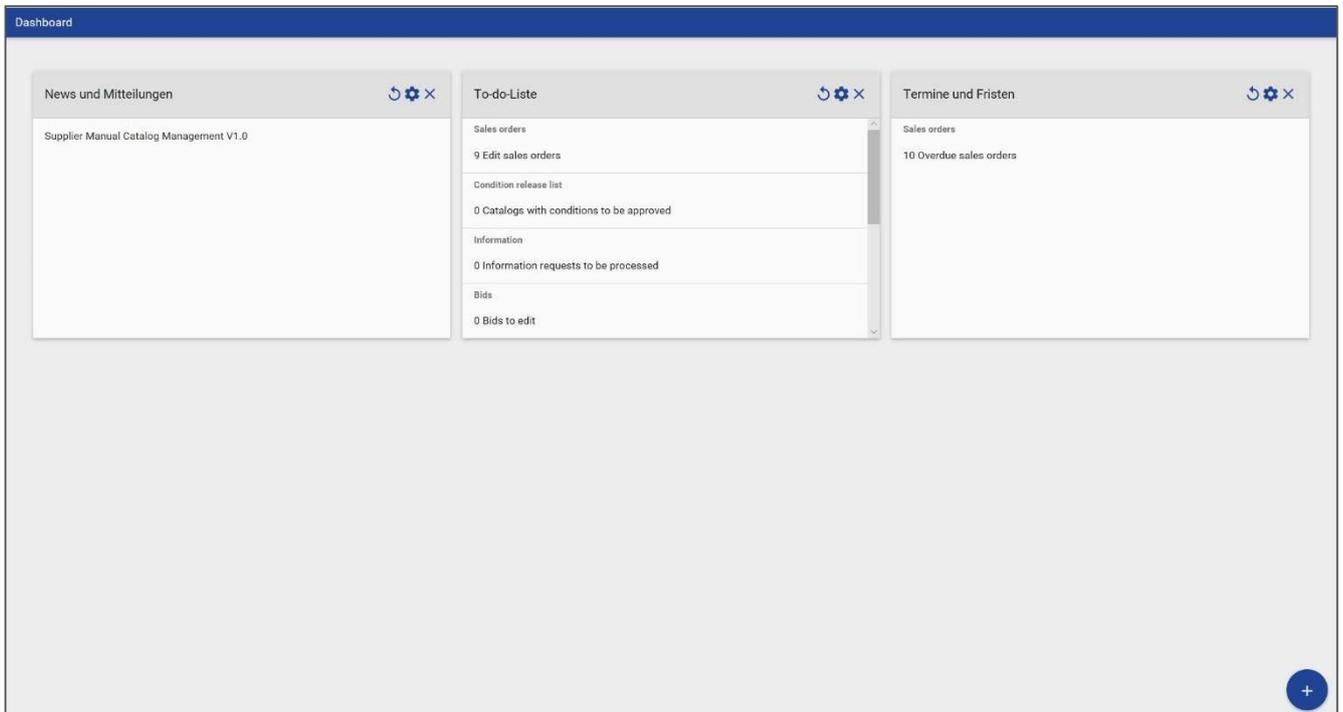
Abb. 1: Dashboard - Widgets

To edit the orders, go to the "Orders" via the "To-do List". By clicking on the link of the Sales orders to be processed you will be forwarded to the order list. All Sales orders to be processed are displayed prefiltered.
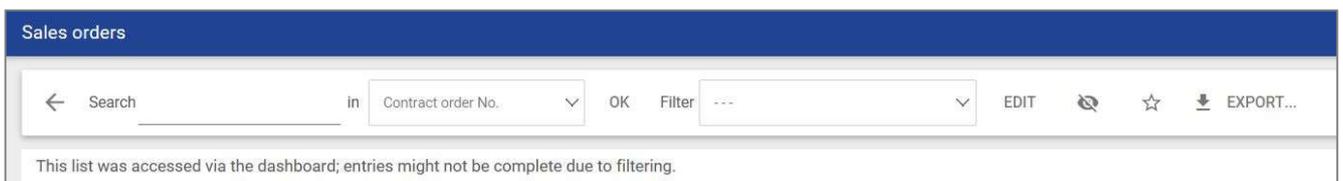
Abb. 2: Filter orders to be processed

To call up the complete order list, go alternatively to "Order processing / Sales orders".

Abb. 3: order processing

In the "Order list", a dropdown list can be used to select the field to be searched in; the order number is preset. In addition, the < Filter> option can be used to filter according to various criteria.

Abb. 4: Filter order search

If the customer has executed a new order, you will be notified by e-mail and system message. It is possible to log in directly to the order via a link within this e-mail or to access the order via your registration in your respective account via the above-mentioned channels.

Abb. 5: Order by e-mail

Depending on the customer's settings, a PDF file, an XML file or an Excel file can be attached to the incoming order e-mail. If attachments listed above are desired, please inform the customer! If you want a direct integration via EDI, you will find further information under 3.Technical connections

2.2. Confirm Sales Order

To confirm the order, click on the order number or title of the order you wish to process. This takes you to order processing. If the order is open, the tab <Basic data> shows the most important data for the order. The <Items> tab contains a list of the individual order items. It is possible to change the delivery date, the order quantity and the price (for user-defined text items) of the individual items. You can add additional positions via the button <Free text positions>, if your customer allows this.


Abb. 6: Purchase order items

Confirm your order via "Action/ Confirm sales order" if you want to confirm the sales order without any changes. The order confirmation will then be sent to the customer.
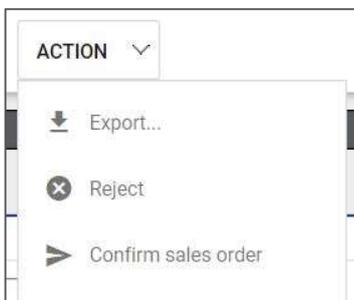
Abb. 7: "Action/Confirm sales order"

If you have entered the order list via the to-do-list widget, this order is no longer in the view at first because this list is prefiltered. To see all orders,

The "AB" step now becomes blue in the order overview. The WE remains in light blue until the customer has booked. This is the pending step on the customer side.

Abb. 8: Order Status

The customer can now post the goods receipt in the system after the items have been received. The status of the order is then marked with a tick in the overview. Marked as "completed".

2.3. Order Change

If you wish to make a change after the order confirmation has been sent, this can be done by changing the order. If you want to adjust items for the order confirmation you will find a description under 2.5 Processing items in the order. Open the orders via <Order Processing> or via the widget <To-do-List> in your dashboard. In the order list, you can click <new order change> on the right under Action and enter the order change.

Abb. 9: New order change via order list

Alternatively, you can change the order in the order itself via "Action/New sales order change". After this has been confirmed with < OK>, the order change screen appears where both the basic data and the item data can be changed.
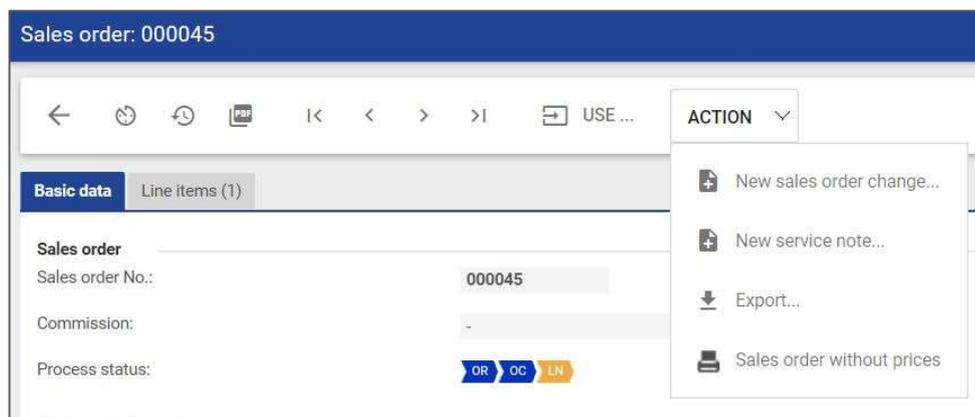

Abb. 10: New sales order change via the order

If comments on the order change are to be stored, these can be entered in the <Basic data> of the order under "Miscellaneous" as "External comment" or "Internal comment". The customer cannot view internal remarks. The customer has access to external comments.

Abb. 11: basic data

Abb. 12: External and Internal comments

You also have the option of adding attachments to the order. You will also find file(s) as the last item under "Other". Via <Selection> you can add an attachment to the order.

Abb. 13: Add File(s)

When you go to item processing, you can add external remarks and also internal remarks for each item.

Line item-related information and annexes should be added to the corresponding order item. Via the <Line items> tab you can see the positions belonging to the order and by clicking on the corresponding position to which you want to add comments or file(s), this is possible under "Other" at the end of the position.

Abb. 14: Order item Remarks and file(s)

The order change can be sent to the customer via "Action/Confirm sales order". The latter can then confirm or reject the order change. If the customer releases the order change, you must send a new order confirmation (see also chapter 2.2Confirm Sales **Order**).

2.4. Order Change from customer

If the customer has changed the order, you will receive an e-mail with the information order change. In this e-mail, you will see the changes made by the customer.
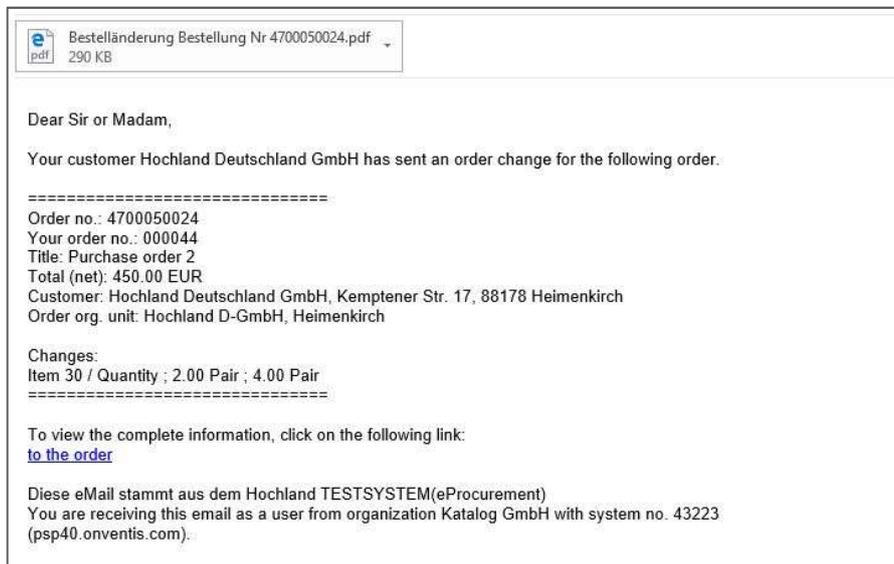
Abb. 15: E-mail order change

If you open the order via "Order processing/Orders" or go directly to the order via the link in the e-mail, you will only see the changes in the order itself via the further tab <follow-up documents>. In the follow-up documents, you see that the customer has made a purchase order change.
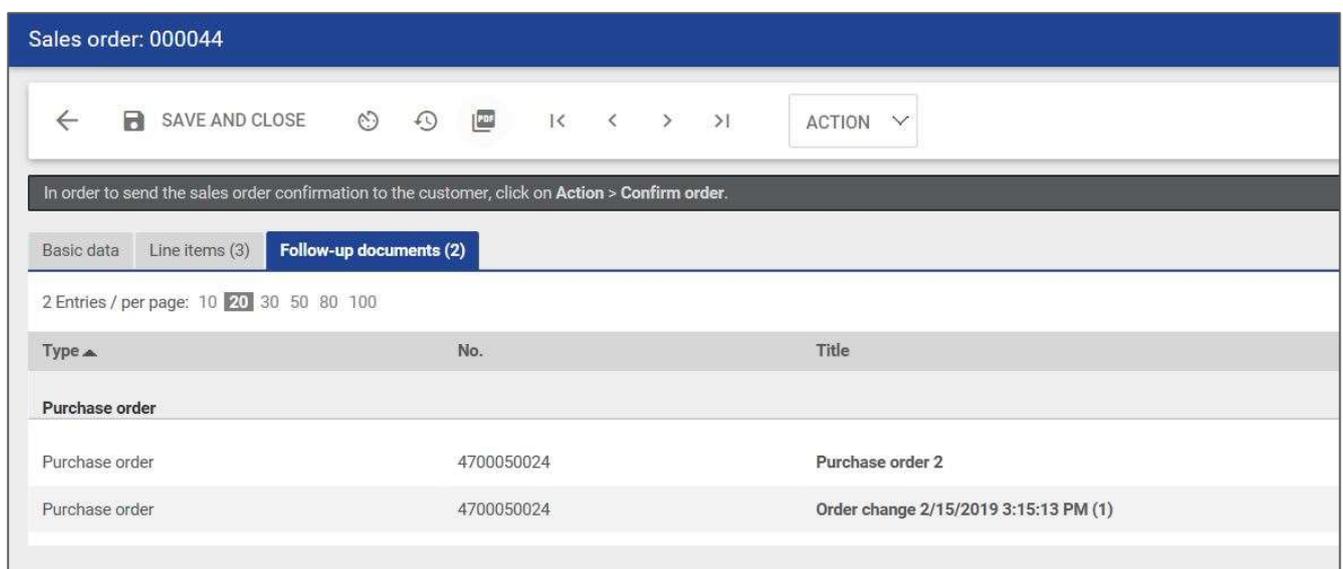

Abb. 16: Purchase order change for follow-on documents

You can confirm the sales order via "Action/Confirm sales order".

It is possible that you do not have to confirm the order change made by the customer by clicking on "Action / Confirm order".

As a rule, however, you will still be informed by e-mail about the order change made.

2.5. Processing items in the order

To edit an order item before sending the order confirmation, open the order. You can then make individual adjustments in the "Position data" tab. In this case, the quantity and the delivery date.


Abb. 17: Changing the positions

If you click on the individual article, the following options exist in the opening mask:

Abb. 18: line item processing

Do not confirm: if you can't deliver this item, click "Don't confirm" in the item. If you then confirm this complete order, the corresponding item is displayed as not confirmed in the order overview when you have sent your order confirmation.

Reject: If you want to reject this order altogether, click on "Reject" in the position. However, a reason for the rejection must first be entered in the item, which is also sent to the customer via the "Other / External comment" field. The item then receives the status "Rejected by vendor".

Transfer the delivery date: With this function, an adjusted delivery date for an item can be passed on to <u>all</u> other items in the purchase order.

Via the function <Save and Close> you return to the position list of the order and see the changed status of this position:

Abb. 19: Status of changed Items

Via the menu item "Action" you also have further options available:

Export: This can be used to export an XML file to OpenTrans 1.0 of the order, which can then be imported into the ERP system.

Decline: This rejects an order. The customer will be informed by e-mail

Sales order without prices: a PDF position list can be generated, which lists all positions of the order without prices.


Abb. 20: Confirm sales order

Confirm your sales order via "Action/ Confirm sales order" if you want to confirm the sales order without any changes. The order confirmation will then be sent to the customer. The customer must release your change to this order. You must then either click in the order overview <new order change>, or you go into the order and then go to "Action/new sales order change".
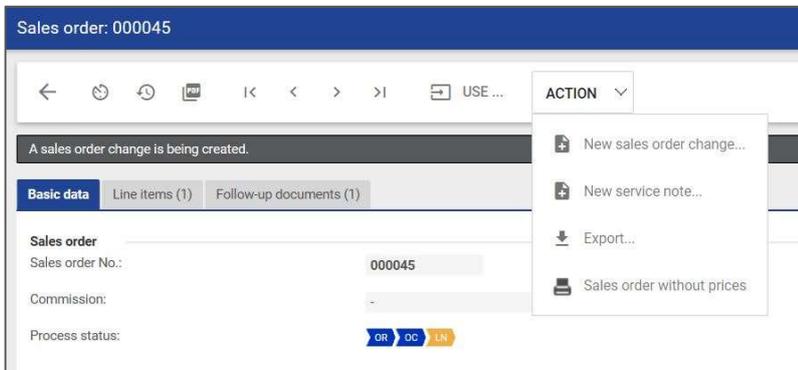

Abb. 21: New sales order change

In the new sales order change, go to "Action/Confirm sales order".
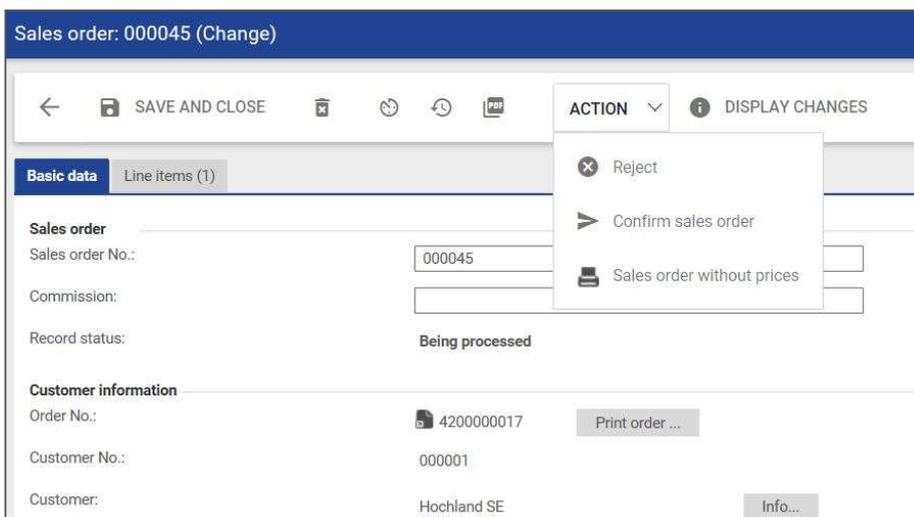
Abb. 22: Confirm sales order

2.6. Creating a service note

For service orders, a service note must be created. You can recognize orders that require a service note by their status in the order overview.

Abb. 23: Create new service note

To create new service not, use <New service note> in the line of the corresponding order.

Or go to the order form and click on "Action/New service note". In the window that opens, you will see two tabs < Basic data> and <Line items>. In the < Basic data> tab, you can adjust the title for the performance record and specify the performance period and the performance location.

Abb. 24: Title and performance period

You can also store internal and external comments and add an attachment.

Abb. 25: Comments and File(s) in the service note

In the <items> please mark the items from the order with a check mark and set this to completed when the service has been completed.

Attention, the positions are automatically marked as completed. If this service has not been completed and has not been performed completely, please remove the check mark!

The supplier can mark a service as completed if the customer permits this. If this option is not available, the customer must do this in the release.
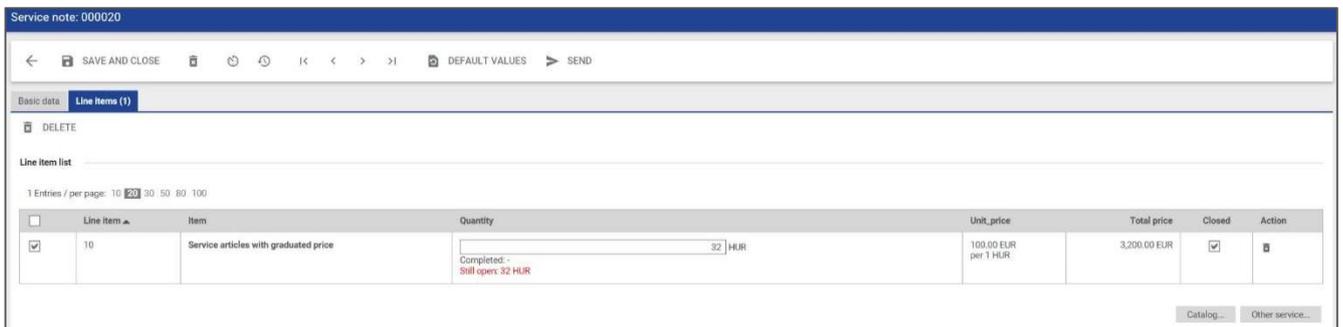
Abb. 26: Completed

Services that may have been completed in less than the ordered time and have been fully performed should be marked as completed. If a service has not been completed or has been fully performed, it should not be marked as completed when the proof of service is created. You have the option of making the corresponding entry for the quantity to show how much was performed.

If the option "Add further services" is activated in the customer's order processing workflow, the supplier can add further services as an item < further services> or from his own catalog, e.g. travel expenses, consumables, etc...

Prerequisite for adding further services:

- Catalog: Service articles with a condition released for the customer
- Additional service: Item must be flagged as a *service.*

These must then be supplemented by the customer with account assignment data etc. during release.

Abb. 27: Add further service in the service note

Now add the corresponding information to the mask.

Abb. 28: Enter the service

In addition to services, you can also add consumable materials to the service note. Go via <Catalogue>. The consumable material must be flagged as an article category as a service. Otherwise, it cannot be added to the proof of performance.

If you create an activity record for a user-defined text item, you must specify the quantity, service, unit price, and so on in the item, as you do for services.

In the catalogue, click on the desired article you wish to add and add it in the desired quantity.

Abb. 29: Select and add items

After adding <further service> in the form of consumable material or service, you see the corresponding items in the overview of the service proof in the tab <Items>.

Abb. 30: Added services/consumables

To send the performance record to the customer, click <Send>.

If the service note has been released by your customer, you will see this in the overview of orders with the status, there the LN will now appear in light blue.

Abb. 31: Service note sent

You can view all performance records via the "Order processing/Performance records" function.

3. Technical connections

3.1. Transfer of Purchase Order Documents

The following order transfer options are possible

Mail + PDF Attachment (Standard)

Mail + XML Attachment (default)

Mail + XLSX Attachment (default)

The customer can set up all variants of e-mail transmission in his own system. In this case the installation is free of charge.

Further possibilities:

XML on FTP server (additional effort)

XML to http address (additional effort)

There are additional costs for setting up the XML transfer. In addition, additional formats are possible, but these are also associated with additional costs. By default the format openTrans 1.0 is used.

You can request an offer from Onventis via the link below:

https://www.onventis.de/download-angebot-onventis-supplier-integration/

3.2. Transfer of Purchase Order Documents - Purchase Order Change

The order change can also be transmitted by e-mail or EDI. This facility also entails costs. Please also request a quotation via our homepage.

3.3. Transfer of order documents - Order confirmation

The order confirmations can be executed manually within Onventis Buyer (see 2.2 Confirm Sales Order). Furthermore, it is possible to process order confirmations in the form of XML openTrans in Onventis Buyer. Here the document is expected on an FTP server to be commissioned or via HTTP(S). From there, the document is picked up by Onventis Buyer and processed accordingly.

The FTP and https variant is a chargeable facility. Please use the form for a cost inquiry:

https://www.onventis.de/download-angebot-onventis-supplier-integration/

4. Supplier profile and Network search

With the Supplier Portal the possibility was created for you as a supplier to design a public company appearance, the so-called **supplier profile**. This profile is automatically published in the **Onventis Cloud Procurement Network** and can therefore be found via the new supplier search in the procurement solution Onventis Buyer as well as in the new **public Onventis supplier search.**

4.1. Maintain Vendor profile

In principle, any organization registered in the Onventis Supplier Portal can create a profile and enter its company master data here. Only the user role "Administrator" can edit the supplier profile.

In addition to the settings that are available in the **basic profile**, a chargeable **plus profile** can be booked in the future. The plus profile is an upgrade of the basic profile, which can be enriched with additional interesting content (the upgrade is not yet available). In the following list all contents of the supplier professional are listed. Exclusive **Plus Profile content** is marked with an asterisk (*):

- **Title wallpaper***
- company logo
- Company name + suffix
- slogan
- Contact details and contact persons
- basic data
- Legal information

- Brief description of the company
- **Product and Service Gallery***
- Product and service categories (eCl@ss)
- Delivery and service areas
- **Customer References***
- certificates
- eProcurement Integration
- **Left**
- Public link to profile

The better and more complete this information is maintained, the better your organization can be found in the Onventis Cloud Procurement Network.

4.2. Advantages of the Supplier profile

For **suppliers,** the supplier profile serves the external presentation of their own organization and the search ability in the Onventis supplier network. For purchasing companies, it is possible to identify new suppliers in the **Onventis procurement network in** addition to searching for already added suppliers in the supplier master. A supplier can be directly contacted via the contact data as well as via a contact form and added to the customer-supplier base in Onventis Buyer at the push of a button.

4.3. Supplier Profile in the Onventis Buyer Supplier Network Search

In the procurement solution "Onventis Buyer", purchasing organizations can select the function "Search in supplier network" in the central search field. The prerequisite for using this feature is the activation of the corresponding license. This can be used to find supplier profiles that have been created.

The search results page lists all suppliers whose information in the supplier profile (e.g. name, location, description, eCl@ss product groups) returns suitable results for the search query. Here a customer can get an overview of potential new suppliers and add them to his supplier master at the push of a button.

4.4. Supplier profile in the Onventis Public Supplier Search

A supplier profile can also be found via the "Onventis Public Supplier Search". This public search is included on the following Onventis website: https://network.onventis.com/