Job Aid

Supplier Purchase Order Dashboard

Supply Chain Management

Authors: Anna Bielkina, Fabio Herle

Date: February 2017

METTLER TOLEDO

JAGGAER Job Aid – Supplier Purchase Order Dashboard
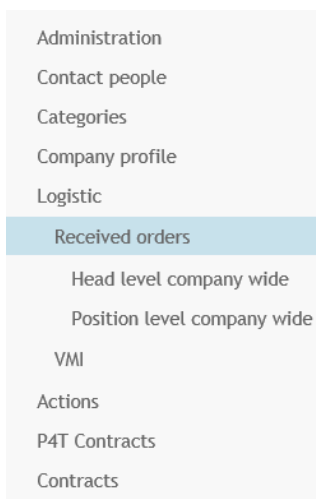
Table of Content

1 Introduction

JAGGAER supplier portal allows supplier to monitor, update and confirm received Purchase Orders (PO) in real time. All POs created in SAP are transferred automatically to procurement portal and supplier receives request to confirm the order via e-mail. This process makes communication between buyer and supplier more effective and transparent.

Job Aid gives step by step instruction on how to use Purchase Order Dashboard on JAGGAER supplier portal and which functionalities are available for supplier.

2 Supplier Purchase Order Dashboard

2.1 Navigation

In order to see all assigned Purchase Orders(PO) go to **Logistic → Received orders**

Administration
Contact people
Categories
Company profile
Logistic
  Received orders
    Head level company wide
    Position level company wide
  VMI
Actions
P4T Contracts
Contracts

There are 2 available views:

Head level company wide – shows the header level of POs

Position level company wide – shows PO item level and line split

2.2 Head level company wide

Select **Head level company wide** to open header view of all assigned POs.

Logistic
Received orders
Head level company wide
Fast view
Not confirmed
Not complete confirmed
Changed (Quarter)
Added (Quarter)
All
New report
Position level company wide

1. **"Fast view"** shows most actual orders:

Head level												1 Entries found.
Menu	Order Type	Order number	No. pos.	Changes	State	Open	Files	Confirmation	Fast confirmation	Confirmation No	Confirmation Number	Download last	Advisor
ZD	4500252537	1	1	Confirmed	☑	1	●●●	☐	1324132	1324132		MettlerToledo Dataexchange

Use this function to see recent POs and minimize loading time.

2. **"Not confirmed"** view allows to see all POs that were not confirmed yet by supplier:

Menu	Order Type	Order number	No. pos.	Changes	State	Open	Files	Confirmation	Fast confirmation	Confirmation No	Confirmation Number	Download last	Advisor
ZD	4501919272	4	24	Sent		56	●●●	☐				MettlerToledo Dataexchange
ZD	4501918120	2	3	Sent		2	●●●	☐				Derrick Heard
ZD	4501916830	1	17	Confirmed		15	●●●	☐				MettlerToledo Admin

There is possibility to confirm all open POs at once by using **Send fast confirmation** functionality.

Tick all POs that should be confirmed, put Confirmation Number and click **Send fast confirmation** in the upper right corner. Before confirmation open PDF per PO via the blue button in the **Download last** column

Send fast confirmation | CSV Export | CSV Export whole list | Export complete Overview

Head level

Menu	Order Type	Order number	No. pos.	Changes	State	Open	Files	Confirmation	Fast confirmation	Confirmation No
ZD	4501919272	4	24	Sent		56	●●●	☑	453R11
ZD	4501918120	2	3	Sent		2	●●●	☑	453R22
ZD	4501916830	1	17	Confirmed		15	●●●	☐	

System will ask you to approve fast confirmation. To do so select ✔ yes, all positions

Send fast confirmation
✔ yes, all positions   ❌ Close

Do you want to send all the fast confirmations now?

Check the delivery date before confirmation. System will show an error in case if delivery date is in the past.

Fast Confirmation Error (1):
Date has to be greater than today!!
Order number: 4501919272

3. **"Not complete confirm"** view shows all POs that were not confirmed at all or were confirmed partially:

It is also possible to use fast confirmation functionality from this view Send fast confirmation

4. **"Changed"** view shows all POs that were updated. Data could be filtered by quarter:

Changed (Quarter)
2018/01
2017/04
2017/03
2017/02
2017/01

5. **"All"** view shows all POs that were assigned to supplier. It could take some time for system to display this view in case of high PO volume.

Head level   1591 Entries found.   1/80

Menu	Order Type	Order number	No. pos.	Changes	State	Open	Files	Confirmation	Fast confirmation	Confirmation No	Confirmation Number	Download last	Advisor
	ZD	4500252537	1	1	Confirmed	☑	1	●●●	☐	1324132	1324132	⬇	MettlerToledo Dataexchan
	ZD	4500252532	1	1	Sent	☑	1	●●●				⬇	MettlerToledo Dataexchan
	ZD	4501919384	1	0	Confirmed	☑	1	●●●	☐	test PI	test PI	⬇	Derrick Heard
	ZD	4501919272	4	24	Sent		56	●●●	☐			⬇	MettlerToledo Dataexchan
	ZD	4500252522	1	0	Delivered		1	●●●	☐			⬇	MettlerToledo Dataexchan
	ZD	4500252514	1	2	Sent	☑	1	●●●				⬇	MettlerToledo Dataexchan
	ZD	9801918837	1	0	Delivered	☐	0	●●●					Michael Guntlin
	ZD	9901918837	1	0	Delivered	☐	0	●●●					Michael Guntlin

6. **"New report"** functionality allows supplier to use additional filters and create customized view of PO Dashboard

Order number	
POOL4TOOL ORDER ID	
State	--- ▾
	Filter expand ▾ Show

Search could be done by PO number, but also **Filter expand** is available that gives more options to filter based on the requirements.

Order number		Order was changed by
POOL4TOOL ORDER ID		☐ Supplier ☐ Customer
Material		
Material #		
Supplier material#		
Confirmation Number		
Delivery address	--- ▽	

Payment conditions	--- ▽	Order is confirmed by supplier
Date created	from [ ] to [ ]	☐ No confirmation ☐ partial ☐ Confirmed
Last change	from [ ] to [ ]	☐ Order declined ☐ Order not declined
Delivery date (DD.MM.YYYY)	from [ ] to [ ]	☐ Not rescind orders ☐ Rescind orders
Advisor	--- ▽	☐ Order rescind and rescission is not confirmed
Order type	--- ▽	☐ Order rescind and rescission not answered
Delivered completly	yes, all positions ☑ no ☑	☐ Order rescind and rescission declined
Show changed/uchanged orders:	All ○ only unchanged ○ only changed ○	☐ Advise overdue
State	--- ▽	

Filter reduce   ▽ Show

2.3 Position level company wide

"Position level company" view wide displays PO item level and shows more detailed split line by line:

Position level   6201 Entries found. ▣

⟨⟨ ⟨ ▮ 1/311 ▽ ⟩ ⟩⟩

Menu	Order Number / Pos	Order Type	Changes	State	Item state	Open	Confirmation	Material number	Supplier material number	Description	Confirmation Number
	4500252537 / 10	ZD	1	Confirmed	Confirmed	☑	●●●	000000000011103740		Power Supply	1324132
	4500252532 / 10	ZD	1	Sent	Sent	☑	●●●	000000000011103740		Power Supply	
	4501919384 / 10	ZD	0	Confirmed	Confirmed	☑	●●●	000000000061090625	TEST	Gas Spring PFA569 TA208835-44	test PI
	4501919272 / 10	ZD	16	Sent	Sent	👁	●●●	000000000051192064	NP-TST-12345	Chemiluminescence Bundle HP DSC	
	4501919272 / 20	ZD	3	Sent	Sent	👁	●●●	000000000051192064	NP-TST-12345	Chemiluminescence Bundle HP DSC	
	4501919272 / 30	ZD	3	Sent	Sent	👁	●●●	000000000051192064	NP-TST-12345	Chemiluminescence Bundle HP DSC	
	4501919272 / 40	ZD	2	Sent	Sent	👁	●●●	000000000051192064	NP-TST-12345	Chemiluminescence Bundle HP DSC	

As an example above PO has 4 lines and 3 last lines were canceled by supplier. On the position level system will show all 4 lines separately in the report. On the head level it would be only one PO with number of lines (position)

Head level

Menu	Order Type	Order number	No. pos.	Changes	State	Open	Files	Confirmation	Fast confirmation	Confirmation No	Confirmation Number	Download last
	ZD	4501919272	4	24	Sent	👁	56	●●●	☐			⬇

Same options are available on the **"Position level company wide"** view:

Position level company wide
- Fast view
- Not confirmed
- Changed (Quarter)
- Added (Quarter)
- All
- New report

2.4 Dashboard functionalities

There are several functionalities available on the Received orders level in order to manage the Dashboard.

1. **When buyer creates PO in the MT SAP, supplier gets notification by email.**

Dear Mrs.

Mettler-Toledo has sent you an order for your further handling via the Mettler-Toledo supplier portal.

Order no.: 4501919587

In order to further process this order, please login to the Mettler-Toledo supplier portal with your user account:
https://mtdemo.pool4tool.com/order_request.php?id=123477

Loginname: Wan yujie
Password: Please use your fixaccount

Best regards
Mettler-Toledo supplier portal

This notification has order number and also direct link to PO in the supplier portal.

If supplier has not opened up a Purchase Order after 96h (4 business days), first automatic reminder is end to the supplier.

Dear Mr.

You have not yet viewed an order sent to you by the Mettler-Toledo supplier portal.

Order no.: 4500252537

In order to further process this order, please login to the Mettler-Toledo supplier portal with your user account:
https://mtdemo.pool4tool.com/order_request.php?id=123730

Best regards
Mettler-Toledo supplier portal

If the supplier has not opened up a Purchase Order after 24h, an automatic reminder is going to be sent to the supplier as well to the buyer group who has issued the order.

From that point in time, every 24 hours supplier will receive new email reminder until PO is not confirmed in the portal.

It is important to use links and confirm orders on time to avoid issues with deliveries.

2. **To open PO and see more details click on the folder icon**

Menu	Order Number / Pos	Order Type
	4500252537 / 10	ZD

The new window will pop up with all PO data and attachments

Mettler-Toledo, LLC - MTI, 1900 Polaris Parkway, 43240 Columbus, United States of America

National Precision
25901 Emery Rd Ste 103
44128-6213 Warrensville Heights
United States of America
Supplier address

Delivery address:
Mettler-Toledo, Inc
MTWT
1150 Dearborn Drive
43085 Worthington
United States of America
Delivery MT address

Order
Order number/Date
4500252537 / 2018-01-26
Supplier number
200017273
Contact person
MettlerToledo Dataexchange
Telephone
Fax

E-Mail
global.procurement@mt.com
Your person responsible
Fabio Herle

PO number and date

Supplier number in MT system

MT contact details

Delivery conditions: EXW Warrensville Heights (Ex Works)

Payment conditions: within 30 days due net

Payment terns & Incoterms

Pos.	Mat.No/Details	Quantity	delivery date	Stat. Delivery Date	Price/Unit	Confirmation number
10	11103740 Power Supply	6 EA	2018-02-14	2018-01-29	11,00/ 1,00 ST	1324132 ☑ 2018-01-31

On the PO item level there are:

- Material number / Details
- Quantity and Unit of measure
- Delivery date
- Price
- Confirmation number
- Total Value

Supplier can update 3 fields in the PO and confirm it back to the buyer:

Quantity
Quantity   6   EA

delivery date
Delivery Date   2018-02-14

Confirmation number
Confirmation number   1324132 ☑
2018-01-31

Supplier could also use **Split** [⊕ split] option in order make a delivery split within the PO and deliver partially in case if all materials are not available at the requested delivery date. To do so click **Split** and two lines will appear. Put adjusted quantity to first line and adjusted quantity to second line and update delivery dates as needed.

Pos.	Mat.No/Details	Quantity	delivery date
10	11103740 Power Supply	3 EA	2018-02-14
		2 EA	2018-02-23
		1 EA	2018-03-15

3. To confirm PO after the revision put confirmation number and click Save and send back:

Supplier confirmation number: [   ]

[Save and send back]

Confirmation number is number that used to link MT PO to internal supplier's confirmation.
In case if there is no confirmation number used by supplier it is possible to skip this step by putting **N/A** or enter blank space into the field and proceed with Save and send back.

Supplier cannot confirm line item 10 without also confirming line item 20 at the same time. This means that all line/position items have to be confirmed as part of same order confirmation.

In case of delivery split still the whole purchase order should be confirm.

4. If PO was updated by supplier with a deviation, buyer receives email notification:

Example below: supplier confirmed with a different delivery date than ordered:

Dear Mr

Through the Mettler-Toledo supplier portal a confirmation has been transmitted that differs from the order.

Order number: 4500252537
Supplier: National Precision

Changes position 00010: 11103740 Power Supply		
Field	Old value	New value
Delivery date	2018-01-29	2018-02-14

Buyer will decide if there is a need to come back to supplier for clarification or agree with proposed updates.

5. PDF of Purchase Order is available on the broader PO level

Documents:
Please open the order PDF!!
ZSCPORDER2_4501919384.PDF (2018-01-04 14:35:10)

By clicking on blue link supplier open pdf with all PO details. Supplier MUST open the PDF in order to be able to send an order confirmation. Before the newest PDF has not been opened, supplier is not able to send back the order confirmation.

Date	01/04/2018			
Page	1 of 1	TEST OE1CLNT100		

Mettler-Toledo, LLC

Delivery Address   Mettler-Toledo, Inc
MTMS
6600 Huntley Rd.
Columbus OH 43229

Address | 1150 Dearborn Drive, Worthington, OH USA 43085
6600 Huntley Road, Columbus, OH USA 43229
Phone | (+1)614 438 4511

www.mt.com

National Precision
..
PO Box 68062
Anaheim CA 92817-0862

Vendor No	200017273
Order Date	01/04/2018
Buyer	D. Heard
Telephone	(+1) 614 841 7359
E-Mail	derrick.heard@mt.com
Delivery Condition	EXW / Warrensville Heights
Paying Condition	Due 30 Days from Invoice Date
Shipment Type	terms of delivery
Carrier	shipping instructions

Purchase Order 4501919384

release order text

Pos	Quantity	Unit	Item	Price / Unit	Discount	Dock Date
00010	1	EA	61090625	142.55 / 1 EA		06/07/2018
			Gas Spring PFA569			
			TA208835-44			

6. To export list of POs use Export functionalities

Received orders

Send fast confirmation | CSV Export | CSV Export whole list | Export complete Overview

System allows to export data in CSV format and in XLSX Excel format.

#	Customer	Order number	Created (SAP)	Created	Last modified	Confirmation	Changes
	Table:		temp_87217_23635943				
	Records no.:		3				
	User:		Fabio Herle				
	Download date:		2018-02-05 13:34:36				
1	Mettler-Toledo International Inc.	4501919272	21-Dec-17	12/21/2017 12:26	1/11/2018 15:31		24
2	Mettler-Toledo International Inc.	4501918120	10-Nov-17	11/10/2017 8:18	11/28/2017 22:45	Not confirmed	3
3	Mettler-Toledo International Inc.	4501916830	29-Sep-17	9/29/2017 14:14	12/14/2017 15:24	Not confirmed	17

If technically capable, the supplier could use the .CSV file to upload the PO data to internal ERP system instead of typing it in manually.