

Quick Guide to the Supplier Portal

“The fact that the transaction piece is taken care of and almost becomes invisible means you’re talking to your customers about different things – you’re talking about adding value to the relationship.”

*Janice Kite, UK eBusiness Manager, Johnson & Johnson
Supplier on the Basware Commerce Network*

Suppliers are under increasing pressure to understand customer needs and make it easier to do business. Meanwhile their customers are implementing an increasing number of electronic initiatives to streamline their purchasing processes. Unfortunately, buyer-side solutions don't always address supplier-side challenges.

That’s where Basware comes in.

To ensure you keep ahead of the game Basware offers you easy to use connectivity and content solutions in one environment. Free of charge. Our supplier solutions give you:

- single-point connectivity to access multiple buyers
- integration to your sales and finance systems, reducing manual data entry and double keying
- a single portal for entering catalogue content and publishing it to multiple buyers and marketplaces
- an online reporting system which shows you who's buying what and when

Basware's solutions are internet based, fully hosted, and security accredited. That means you can access your orders, manage your content, and keep on top of your customer relationships anywhere you want to, whenever you want to.

Manually processing paper invoices is labour intensive, time consuming, has high administrative costs and has an environmental cost. By utilising eInvoicing within the Basware Commerce Network it is possible to both reduce costs and environmental damage by eliminating paper consumption.

About This Guide

This quick guide is for Suppliers that have completed their registration on the Basware Commerce Network which encompasses:

- **The Government eMarketplace (Zanzibar)** - the eProcurement marketplace for the UK Public Sector including the Dynamic Marketplace.
- **xchangewales eTrading for Schools** - the eProcurement solution for publicly funded schools in Wales
- **xchangewales eTrading** - the eProcurement marketplace for the Welsh Public Sector
- **Procurement for Housing Marketplace** - the eMarketplace for Social Housing providers
- **National Police Procurement Hub** - the eMarketplace for all Police Forces in the UK and England

This guide will provide you with a brief overview of the Supplier Portal. The Supplier Portal will house all transactional documents you receive from your customers trading via the Basware Commerce Network. It will provide you with brief descriptions of the different elements of the system and how you can complete certain basic tasks.

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Log into the Basware Commerce Network and select Supplier Portal from the left hand menu. You will see the screen below.

ProcServe Sign Out

SUPPLIER PORTAL Home | Documents | Catalogues | Reports | Admin | Help

Documents Awaiting Attention

3 Quotes Not Sent
793 Orders Not Yet Viewed

System Alerts

- For assistance or to report any errors, please contact the Service Desk on +44 (0) 845 604 2328 or by email at suppliersupport@procserve.com.

Marketplace Messages

- (Zanzibar) For more information about the benefits of eProcurement please visit our website: <http://www.procserve.com/documents/supplierbenefits>

Did you know?

- ProcServe has a new ProcServe Trading Network Registered logo for registered suppliers. You can use this logo on your website, email signatures, marketing and promotional material -- where ever you promote your company. With more and more Public Sector organisations joining the ProcServe Trading Network and the Zanzibar community of marketplaces, this is an excellent way to let your customers know that they can trade electronically with you.
- For more information about the benefits of eProcurement please visit our website: <http://www.procserve.com/documents/supplierbenefits>

This will show what is waiting for your attention. The above shows 3 quotes not sent and 793 Orders not yet viewed.

Orders Not Yet Viewed

Click on the link for 'Orders not yet viewed'

SUPPLIER PORTAL Home | Documents | Catalogues | Reports | Admin | Help

Document List | Tree | Search

Orders | Not Yet Viewed | Unlimited

Number	Dated	Value	Buying Organisation
597	05 Sep 2010	117.50 GBP	ProcServe
OPEN005099	18 Aug 2010	11.75 GBP	PServe Test School 300
OPEN005083	28 Jul 2010	5.88 GBP	PServe Test School 300
OPEN005080	28 Jul 2010	219.75 GBP	PServe Test School 300
NEWPN003514	22 Jul 2010	27,557.75 GBP	PServe Test School 300
NEWPN003510	20 Jul 2010	1.18 GBP	PServe Test School 300
OPEN005072	19 Jul 2010	1.18 GBP	PServe Test School 300
WTWY003269	08 Jul 2010	1.18 GBP	West Twyford Primary School
WA005372	08 Jul 2010	1.18 GBP	West Acton Primary
SAEEC000946	08 Jul 2010	1.18 GBP	South Acton Childrens Centre
HS020221	08 Jul 2010	1.18 GBP	The Hollyfield School
E000156	08 Jul 2010	1.18 GBP	St George's Church of England Primary

Document Summary Order 597

From: ProcServe

Dated: 05 Sep 2010

Received: 05 Sep 2010 17:24

Excl. Tax: 100.00 GBP

Total: 117.50 GBP

Related to: [Empty field]

Comments: [Empty text area]

Invoiced: Yes Excl. Tax: 100.00 GBP

On the left hand side you can use the drop down menus at the top to choose which documents you want to list. The right hand will show you the detail of the one selected.

You have the option of setting it out as a list (see above), in tree format (see below) or doing a search.

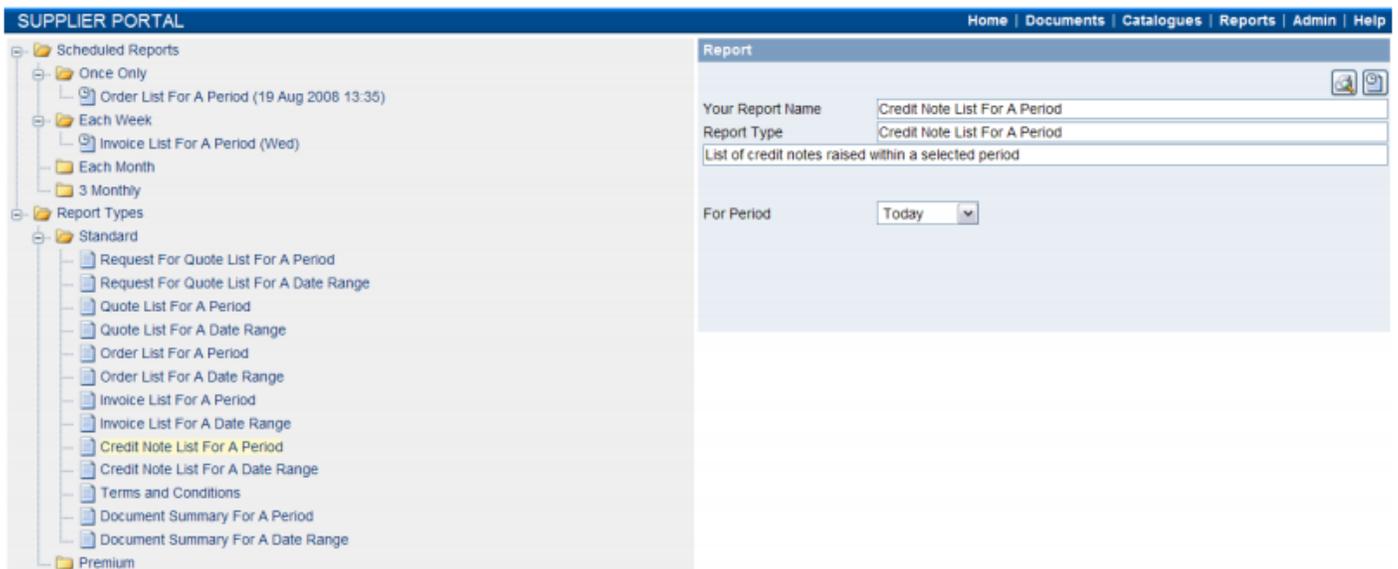


Reports

If you go to Reports this will bring up the following menu options:



To create a report, go to Report Types > Standard and select the type of report you want to run. Information will appear on the right side of the screen.



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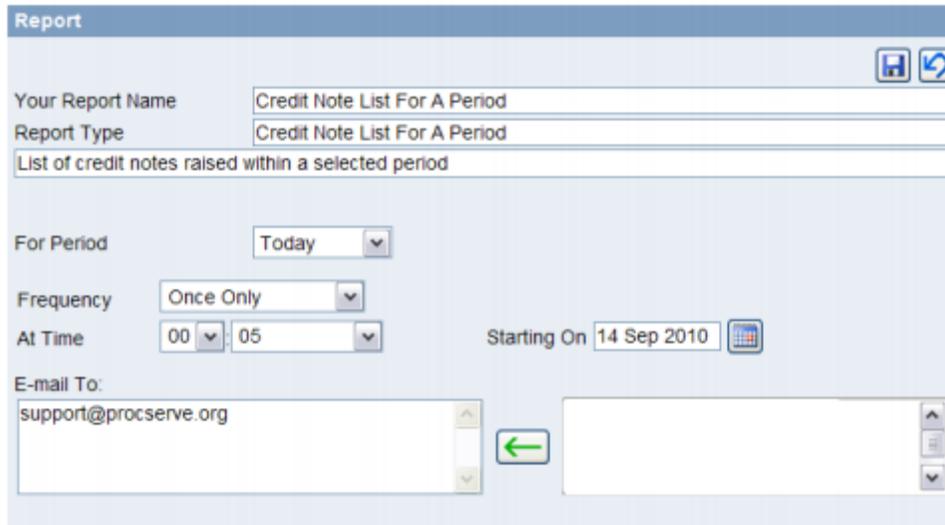
Complete the information by selecting which period it should cover. Choose from the drop down menu. Once this is completed, click



to get a preview of what the report will look like and then click on



to arrange the schedule.

A screenshot of a web form titled 'Report'. It contains several fields: 'Your Report Name' (Credit Note List For A Period), 'Report Type' (Credit Note List For A Period), 'List of credit notes raised within a selected period', 'For Period' (Today), 'Frequency' (Once Only), 'At Time' (00:05), 'Starting On' (14 Sep 2010), and 'E-mail To' (support@procsolve.org). There are also icons for save and refresh at the top right, and a back arrow at the bottom.

Here you need to add in the frequency of when you want this report to be run, at what time and who it should be mailed to.

If you select each week, some tick boxes for the day of the week will appear.

If you select each month, another box will appear requesting to what day of the month to run on.

3 monthly will also request the date.

If you decide that you don't want to go ahead then click on the



and this will cancel your request.

Once you have scheduled a report if you go back and select the appropriate menu selection for that report you should see it displayed as below.



Premium reports are optional value added reports that will be written specifically for the organisation.

Admin

Go to Admin > Company Admin from the top right menu bar.
Under the General tab you will see a screen similar to below:

The screenshot shows the ProcServe Supplier Portal interface. The top navigation bar includes 'ProcServe', 'SUPPLIER PORTAL', and 'PS Supplier Solutions - alexkentish Sign Out'. The main menu has 'General', 'Addresses', 'Users', 'Messages', 'Relationships', and 'spConnect'. The 'General' tab is selected, showing 'PS Supplier Solutions'.

General Configuration

General - Organisation

Name	PS Supplier Solutions
Description	PS Supplier Solutions
DUNS Number	296887490
Main Contact Name	stubbed
Main E-mail Address	
Main Phone Number	
Main Fax Number	
Global Location Number	
Payment Card	Not Registered
Preferred Language	English (UK)
Allow HTML in Emails	<input type="checkbox"/>
Registered As	Not Registered

Tax

Tax Country	United Kingdom
Registered for Tax	<input checked="" type="checkbox"/>
Tax Registration Number	123456
Default Tax Category/Rate	Standard 17.5%
Calculate Tax at the Line Level	<input checked="" type="checkbox"/>
Tax Calculation Rounding	Nearest

General - Documents

Price Decimal Places	2
Quantity Decimal Places	2
Default Item Code	
Default Item Description	
Default Unit of Measure	

It does continue down the page on the right.

This information is all about your company and information on Quotes, Invoices, Credit Notes etc. If you now select Addresses from the top left menu bar it will show the following screen:

The screenshot shows the 'Addresses' page in the ProcServe Supplier Portal. The top navigation bar includes 'General', 'Addresses', 'Users', 'Messages', and 'Relationships'. The 'Addresses' tab is selected.

Address

Description	Address
Main	123 Buckingham Palace Road ... London
Registered	123 Buckingham Palace Road ... London

Address

Description	Main
Address	Lantern House Walnut Tree Close
District	
Town or City	Guildford
County	Surrey
Postcode	SW1W 9SR
Country	United Kingdom
UK Internal Code	

This is just your organisation address(es).

Now select Users on the top left menu bar and you will get a list of the users.

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User ID	E-mail Address
helpdesk@pssupplier	procservesupport@procsolve.com

User ID: helpdesk@pssupplier
Name: helpdesk
E-mail Address: procservesupport@procsolve.com
Administrator Privileges:
Status: Enabled

These details are not editable in this screen, you will need to refer to User management on the Home page. Next on the top menu bar is Messages.

This will be blank if there are no messages. To add a message click on



This will bring up the following screen on the right:

Local Message

Message Title: _____

Start Displaying: 20 Sep 2010 10:58

Stop Displaying: 20 Sep 2010 10:58

Message Text: - English (UK)

Complete the Message Title and put when you want it to start and stop being displayed. Then complete the message.

When you click on  it will save it and it will appear on the left.

If your Start Displaying Time is set in the future you will need to wait for this time before it appears on the left.

Now go to Relationships on the top menu bar:

Relationship and Notification

Relationship Defaults: Request For Quote

E-mail To: _____

E-mail with PDF Order To: support@procsolve.org

Under the Relationships tab you will see a list of customers on the left hand side that you have received a transaction from.

Within this page you can set the Supplier Portal to email documents.

The relationship highlighted in yellow will be viewable on the right hand side. The Relationship default setting will include all Buying Organisations you have a relationship with.

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Select the Document Notification from the drop down list.



You are able to create Order emailing settings from here. If you require a document notification, type an email address in the text box next to 'email to' and select



Once the email address drops into the box below select



to save it.

If you require a PDF document via email, type an email address in the text box next to 'email with PDF order to' and select



Once the email address drops into the box below select



to save it.

**For any further information please
contact the service desk on:**

0845 603 2885

support@procserve.com

About Basware:

Basware is the global leader in providing purchase-to-pay and e-invoicing solutions in the world of commerce. We empower companies to unlock value across their financial operations by simplifying and streamlining key financial processes. Our Basware Commerce Network, the largest open business network in the world, connects 1 million companies across 100 countries and enables easy collaboration between buyers and suppliers of all sizes. Through this network, leading companies around the world achieve new levels of spend control, efficiency and closer relations with their suppliers. With Basware, businesses can introduce completely new ways of buying and selling to achieve significant cost savings and boost their cash flow.

Find out how Basware helps money move more easily and lets commerce flow at www.basware.com.

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Connect with us:

 www.twitter.com/basware

 www.linkedin.com/company/basware