SUPPLY CHAIN MANAGEMENT SYSTEM B+N FACILTY SERVICES

User manual

Version: 5.0
Date 2017.12.08.

CONFIDENTIAL

This document is the user manual for the online supply chain management application.

Recommended browsers: **Mozilla Firefox, Google Chrome** latest versions.

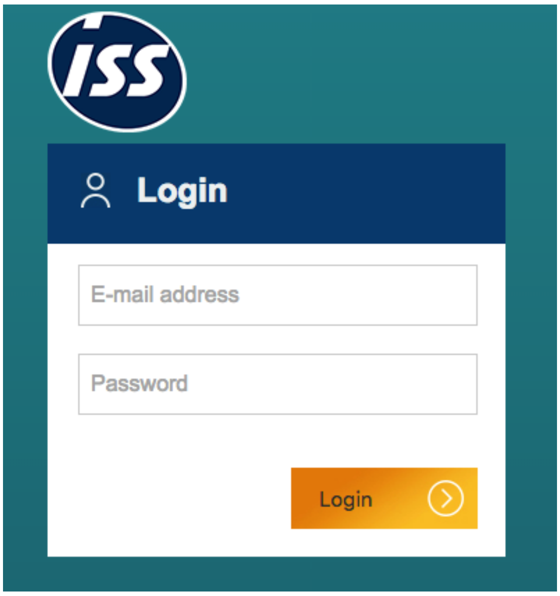
Table of contents

1. User login

You must have a username and a password to be able to logging into the system. If you do not have access to the system you have to ask for it from your regional system administrator – because of security reasons the system administrator can provide access to the site.
If you already have your username and password, then you reach the tool on the following url:

URL is not defined yet.

The url is pointing to the login screen where you can type your username / e-mail address and password.
**Note: After 15 minutes of inactivity the system will log you out from the system automatically and you will have to log in again.*



2. User rights

The system will reveal the menu and data management options according to the corresponding rights of the users.

The SCM system has 6 levels of hierarchy for different user rights:

- 1. Administrator (full control)
- 2. Acquisition (can access: Clients, Locations, baskets, suppliers, products, prices, categories, own orders with full control, job tasks)
- 3. Manager (can access: Clients, Locations, baskets, suppliers, products, prices, categories, own orders with receiving right for open orders, job tasks)
- 4. Operating director (can access: Clients, Locations, baskets, suppliers, products, prices, categories, own orders, making new orders and receiving right for open orders, job tasks)
- 5. Operating leader (can access: Clients, Locations, baskets, suppliers, products, prices, categories, own orders, making new orders and receiving right for open orders, job tasks)
- 6. Service leader (can access: Clients, Locations, baskets, products, prices, categories, own orders, making new orders and receiving right for open orders)

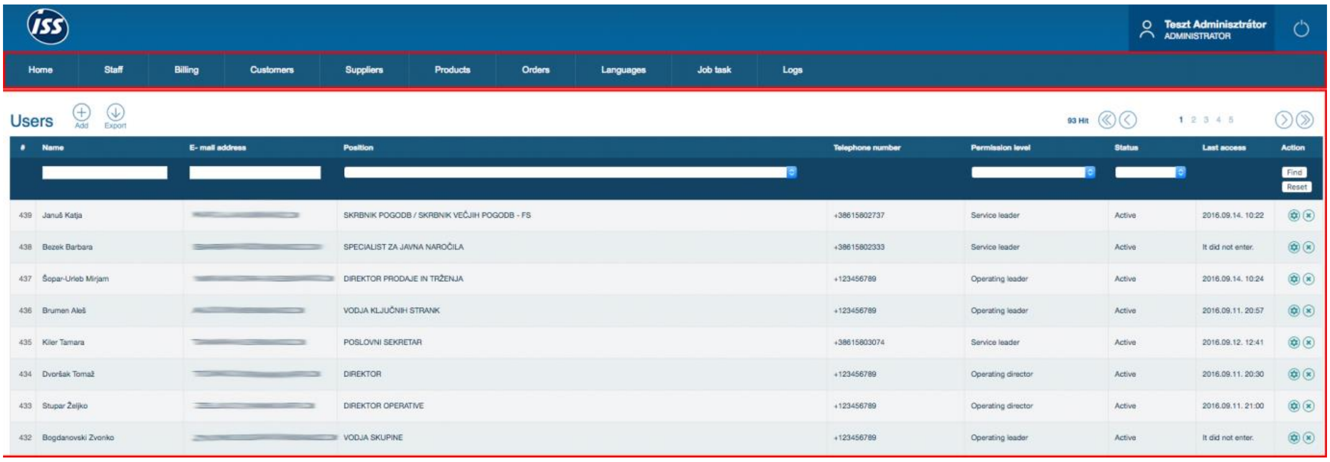
Every user has access to all listing and data viewing features. Every users profile could be **set to „passive”**, in which case he or she **cannot log into the system** anymore.

In case when a user doesn't have the right to view a specific function, that function will remain invisible for that person. This can be done for the menu points as well. For example, a service leader will not be able to see or have access to the „Employees” menu point.

Admin's menu options:

Service leader's menu options:

3. User interface general overview



The upper part of the screen is the header section, the right side of it shows the name and the title of the person who is currently logged in.

By clicking on your name you can change your password.

The B+N icon: by clicking on the B+N icon the user's home screen will appear which contains every useful information about the user's orders.

Under the B+N icon you can find the **Menu bar,** from which you can reach the various modules according to your user rights.

Below the menu bar you can find the main content editing part, which is usually a list in table view.

3.1 Table details

Above the tables there are the three main action icon groups. „Add", „Export" and page view.

You can add new row to the table with the Add icon.

You can export the content into an excel file using this button: Export

Page view icons from left to right: 

1. Jump to the first page
2. Previous page
3. Go to a specific page
4. Go to next page
5. Jump to the last page

The lists can be filtered, using the input fields below the table header titles.

You can use multiple filtering rules.

The filtered list will appear once you enter the filter criteria(s) and click „Find". By clicking „Reset" you will get the default unfiltered list and all input filter fields will be empty. You will see all the records in the table.

Sorting the table is only possible in one column at a time, by clicking to the heading of the column**.**

Usually the first column of the tables is an ID or a „#" column. This is the internal identifier of the system that can be referenced by other modules. This ID is unique in a specified module.

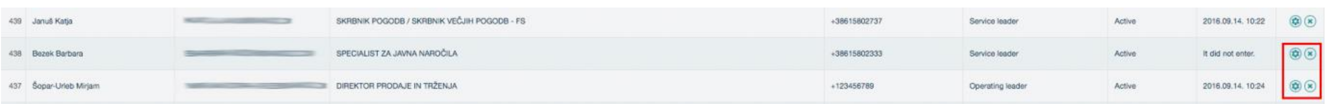
Important: If the export feature is available, then it always applies to the currently filtered list.

3.2 Editing table's rows

Most of the list items are editable. Editing option is reachable by clicking the icon at the end of a row.

Deleting rows is also possible by clicking icon at the end of the record (after clicking on it you must confirm your intention of deleting a row)

View:



4. Menu system

4.1 Dashboard

4.1.1 List of latest orders

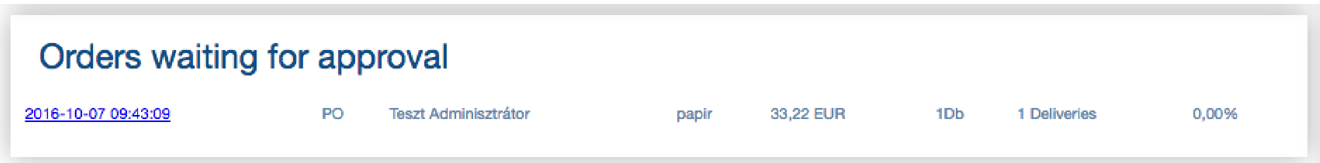
This is displayed for Administrators, Service leaders, Managers, Acquisition and only those which are originated in their own site. Always the last 3 will be listed here.

The following informations are displayed from left to right in this „box”:

- Order date: link, if you click on it you can view the order details in a pop-up window
- Order type: PO / Standard
- Location name
- Order total (value) in the predefined currency
- Total number of ordered items
- Approval status in %

4.1.2 Orders waiting for approval

Displayed for everyone except the service leaders. All orders which are in „waiting for approval” state will be listed for those colleagues who are assigned to the orders locations.

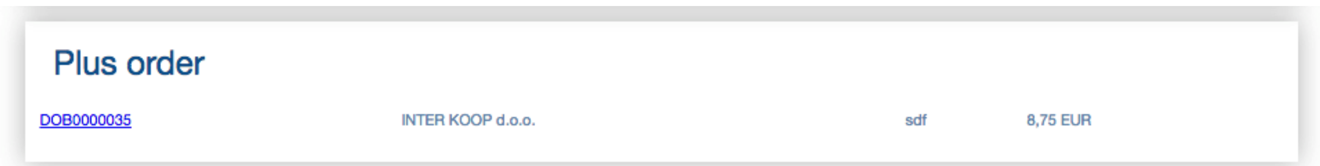


The following informations are displayed from left to right in this „box”:

- Order date: link, if you click on it you can view the order details in a pop-up window
- Order type: PO / Standard
- Location name
- Order total (value) in the predefined currency
- Total number of ordered items
- Amount of suppliers who has fulfillment obligations in the orders
- Approval status in %

4.1.3 Excess shipment

The last 20 excess shipments are displayed **for the Admin users.**



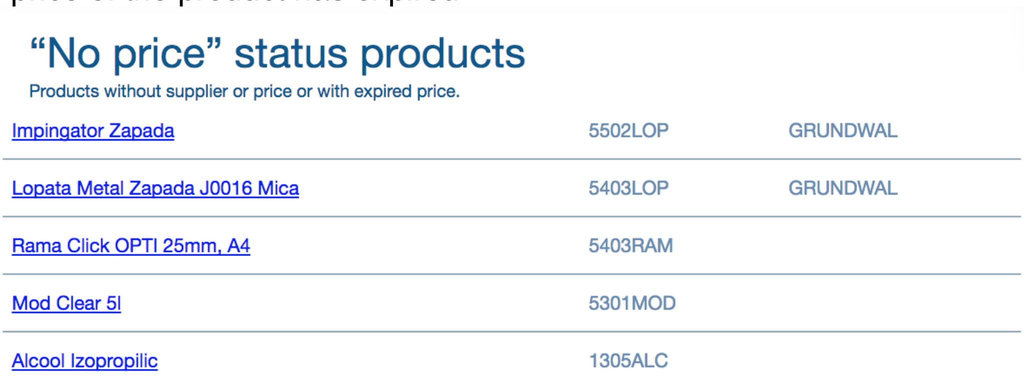
The following informations are displayed from left to right in this „box”:

- Delivery note ID: link, if you click on it you can view the details
- Supplier’s name
- Receiving person
- The total value of the delivery note

4.1.4 „No price“ status products

For Administrators a „No price” status products list is displayed which contains those items which has no registered price in the system. This may occur in the following cases:

- The supplier of the product is removed from the system or changed to passive status
- The price of the product has expired



The following informations are displayed from left to right in this „box”:

- Product name: link, if you click on it you can view the details
- Product ID
- Latest price
- Price expiration date, if it was given

4.1.5 Rejected orders

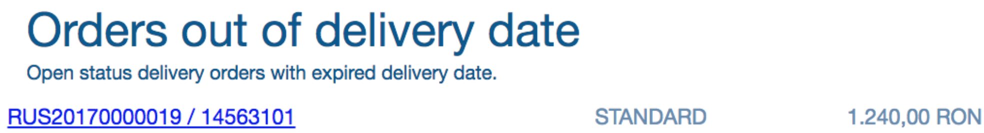
„Rejected orders" is containing the last 20 orders with rejected status.

The following informations are displayed from left to right in this „box":

- Order ID: link, if you click on it you can view the details
- Order type
- Location name
- Order total (value) in the predefined currency
- User who placed the order
- Comment: The cause of rejection

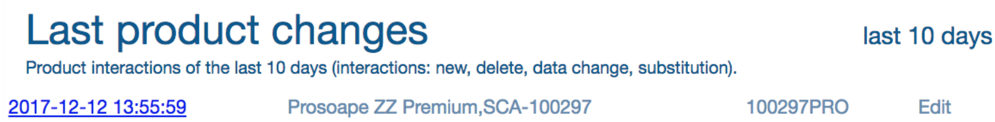
4.1.6 Orders with expired delivery date

It shows the orders which are in open state but the assigned delivery date is expired.



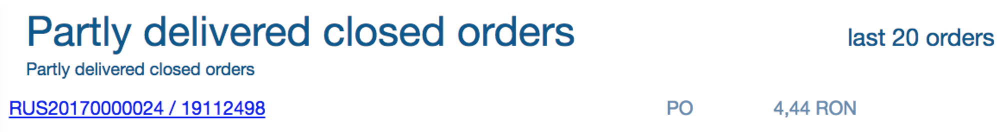
4.1.7 Last product change

It shows those products which had one or more details changed in the last 10 days.



4.1.8 Partly delivered but closed orders

Here you can see the last 20 orders which are closed but partly delivered only.



4.1.9 Modified orders

This module displays the last 20 orders which were modified in the ordering process.

5. Employee management

5.1 Editing

- Only Admin users can add a new employee to the system
- Every user can change their own password (chapter 3)

5.2 Relation of employees and locations

Except for Administrators, users can only access those data of sites which are assigned to their user profile. There may be a case, where the user has right to place an order, but he/she is not linked to any location. In this case, at the order placing step the Client - location field will be empty, therefore the order cannot be placed.

**Note: If you are facing with this case please contact site administrator.*

The following users are automatically linked to locations:

- Location’s service leader
- Location’s opearational manager
- Location’s opearational director
- Location’s approval responsible person 1
- Location’s approval responsible person 2
- Location’s approval responsible person 3

You can assign a location to an employee’s profile under the Stuff function.

6. Currency rate management

Currency exchange feature is available, and it can be set for suppliers only.

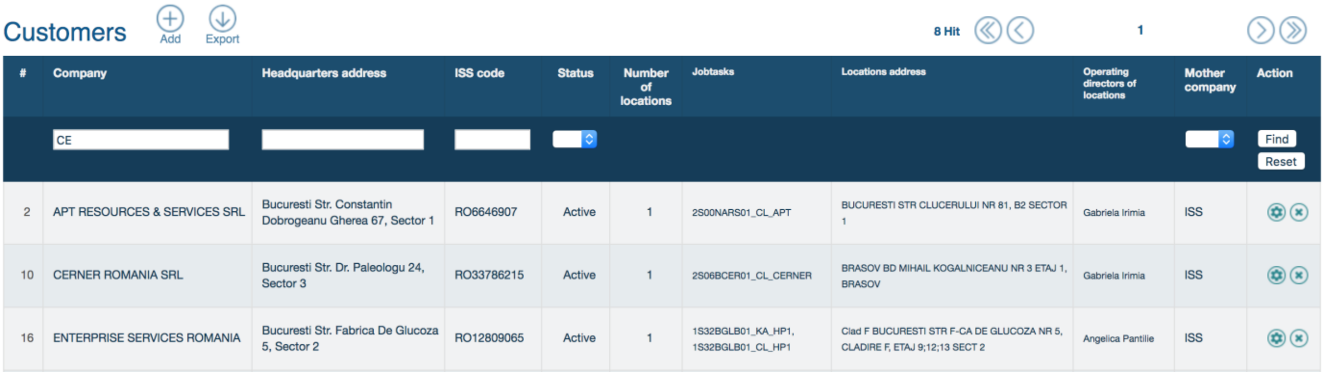
For example, XY supplier company could be set as EUR currency supplier and after that AB company’s items will be calculated with EUR currency.

By default, the system performs operations with the predefined currency.

7. Customer manager

7.1 Customers

The management of B+N’s customers could be performed with this module – adding, modifying.


Customers Add Export 8 Hit 1

#	Company	Headquarters address	ISS code	Status	Number of locations	Jobtasks	Locations address	Operating directors of locations	Mother company	Action
	CE									Find Reset
2	APT RESOURCES & SERVICES SRL	Bucuresti Str. Constantin Dobrogeanu Gherea 67, Sector 1	RO6646907	Active	1	2S00NARS01_CL_APT	BUCURESTI STR CLUCERULUI NR 81, B2 SECTOR 1	Gabriela Irimia	ISS	
10	CERNER ROMANIA SRL	Bucuresti Str. Dr. Paleologu 24, Sector 3	RO33786215	Active	1	2S06BCER01_CL_CERNER	BRASOV BD MIHAIL KOGALNICEANU NR 3 ETAJ 1, BRASOV	Gabriela Irimia	ISS	
16	ENTERPRISE SERVICES ROMANIA	Bucuresti Str. Fabrica De Glucoza 5, Sector 2	RO12809065	Active	1	1S32BGLB01_KA_HP1, 1S32BGLB01_CL_HP1	Clad F BUCURESTI STR F-CA DE GLUCOZA NR 5, CLADIRE F, ETAJ 9;12;13 SECT 2	Angelica Pantilie	ISS	

In the list there are the main informations of the customer – Company, HQ, B+N code, OP. Director.

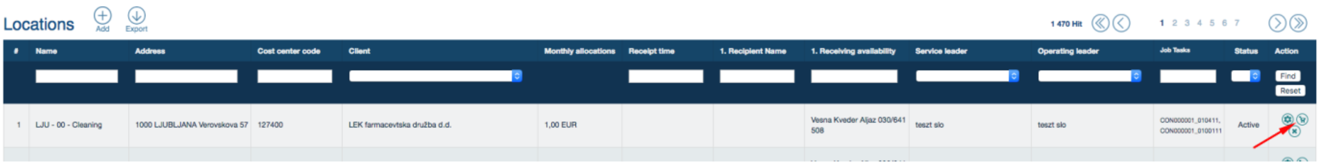
7.2 Customer locations

The system provides an opportunity to be able to set multiple locations for a single customer. You can assign different managers and approval persons for each site. These employees will be assigned automatically to the given location.
There is possibility for setting up a monthly budget for each location in the predefined currency.
Only admin users can register new customer to the system. Operating directors and higher level users has rights to acces the location detail editing module.
Every user has access to those custumers and locations which are assigned to them except the administrator because they have full control ont he system.

7.3 Location baskets

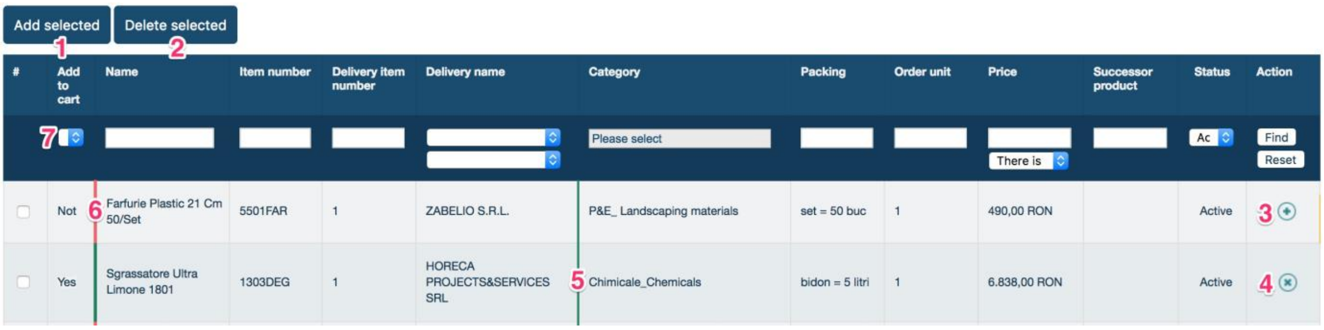
Every user has access to those custumer baskets which are assigned to them.

The baskets are available from Customers / Locations list:



By clicking the basket icon at the end of a location record (by default) you will see only those products which are linked to that location's basket because the list has a predefined filter setting (added to cart, has a price in the system and the product's status is active). The list items here are ready to be ordered.

With the 'add' button those items will be listed which are not linked to the basket (all available but not linked).



Guide:

- With using the checkboxes to select items in the list you can:
  - **1**: Add them to the basket
  - **2**: Remove from the basket
- **3**: Moves the product into the location's basket (single item moving)
- **4**: Removes the product from the location's basket (single item moving)
- **5**: Green line – the product has a proper supplier

  Red line – there is a problem with the supplier in the system (e.g.: inactive)
- **6**: Green line means a product is linked to the location's basket, red line means it's not
- **7**: Filter: "Is in the basket?":
  - Yes: lists those products which are linked to the basket
  - No: lists those products which are not linked to the basket, but available
  - Nothing selected, empty: all products are listed

8. Managing suppliers and temporary suppliers

The list of suppliers is available from the menu bar. The users can add or modify the suppliers who are in partnership with B+N. The orders which were placed in the SCM system will arrive directly to the suppliers. Always the suppliers will be responsible for receiving, processing and delivering the orders.
The SCM system is handling two types of suppliers: standard and temporary.
Management of these two types are available in separated menu points (add, edit, delete).
Only administrators can add new standard suppliers to the system.

If an order is 100% approved, the system will send notification e-mails to the previously set 1st and 2nd receivers which are containing the new orders details – also attached in PDF.

9. Product categories

In order to organize products, product categories can be created. The product categories are stored and managed in a tree structure.
Deleting a category is only possible if it is not containing any subcategories or products (otherwise the system will show an alert (regarding that the category is not empty) and the category will not be deleted).

10. Products

Product database management is available from this menu option.
Products can have only one price and one supplier at a time. The product's previous prices are presented on it's modification page.

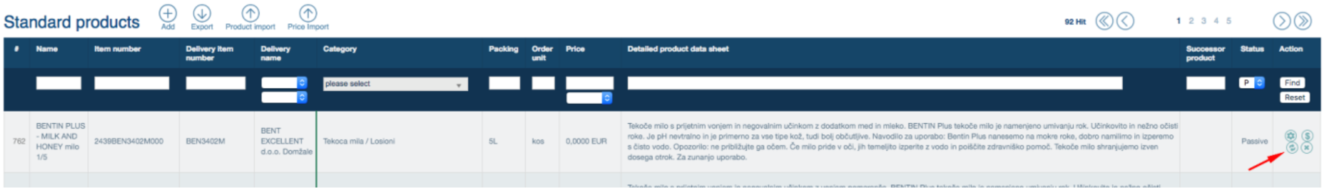
10.1 Product list

In this section the most important filtering option is the "Price". From the dropdown menu three options could be choosen: no filter, defined, not defined. A product can be ordered only if it has a defined price and active status is set.
Those products have a price:

- Which are set to active and its supplier is not deleted
- The actual date is inbetween the price's starting and ending date. If there is no predefined end date for the price, the system will consider only the start date.

10.2 Successive product

In case of a product's status is passive, a "successive product" icon will appear in the list.



By clicking on the icon the successive product can be set, and the location baskets can be updated. If the checkbox is activated for the basket update during the saving process the system will collect all of the baskets where the product was active, and replace them with the successive product.

Products which are in passive state can be recovered if they have no defined successive products. This can be achieved by selecting "Please, choose one" from the successive product drop down list.

11. Orders

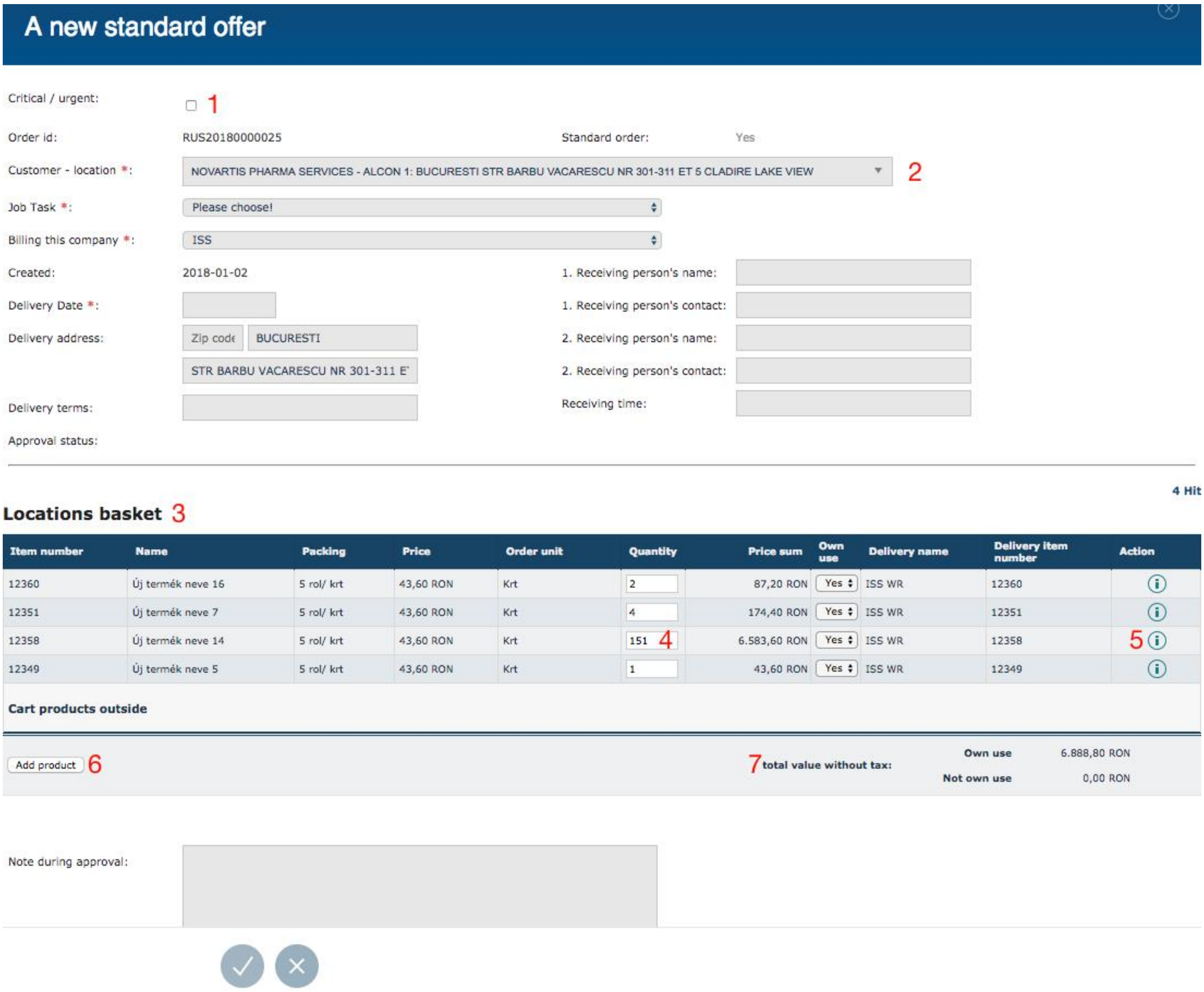
Placing orders are possible only for active, not deleted locations.

11.1 Standard orders

Standard orders are the monthly recurring orders where the products are selected from the standard products.

After navigating to the orders new standard order could be placed:

Placing a new standard order:


A new standard offer

Critical / urgent: 1

Order id: RUS20180000025 Standard order: Yes

Customer - location *: NOVARTIS PHARMA SERVICES - ALCON 1: BUCURESTI STR BARBU VACARESCU NR 301-311 ET 5 CLADIRE LAKE VIEW 2

Job Task *: Please choose!

Billing this company *: ISS

Created: 2018-01-02 1. Receiving person's name:

Delivery Date *: 1. Receiving person's contact:

Delivery address: Zip code BUCURESTI 2. Receiving person's name:

STR BARBU VACARESCU NR 301-311 E 2. Receiving person's contact:

Delivery terms: Receiving time:

Approval status:

4 Hit

Locations basket 3

Item number	Name	Packing	Price	Order unit	Quantity	Price sum	Own use	Delivery name	Delivery item number	Action
12360	Új termék neve 16	5 rol/ krt	43,60 RON	Krt	2	87,20 RON	Yes	ISS WR	12360	
12351	Új termék neve 7	5 rol/ krt	43,60 RON	Krt	4	174,40 RON	Yes	ISS WR	12351	
12358	Új termék neve 14	5 rol/ krt	43,60 RON	Krt	151 4	6.583,60 RON	Yes	ISS WR	12358	5
12349	Új termék neve 5	5 rol/ krt	43,60 RON	Krt	1	43,60 RON	Yes	ISS WR	12349	

Cart products outside

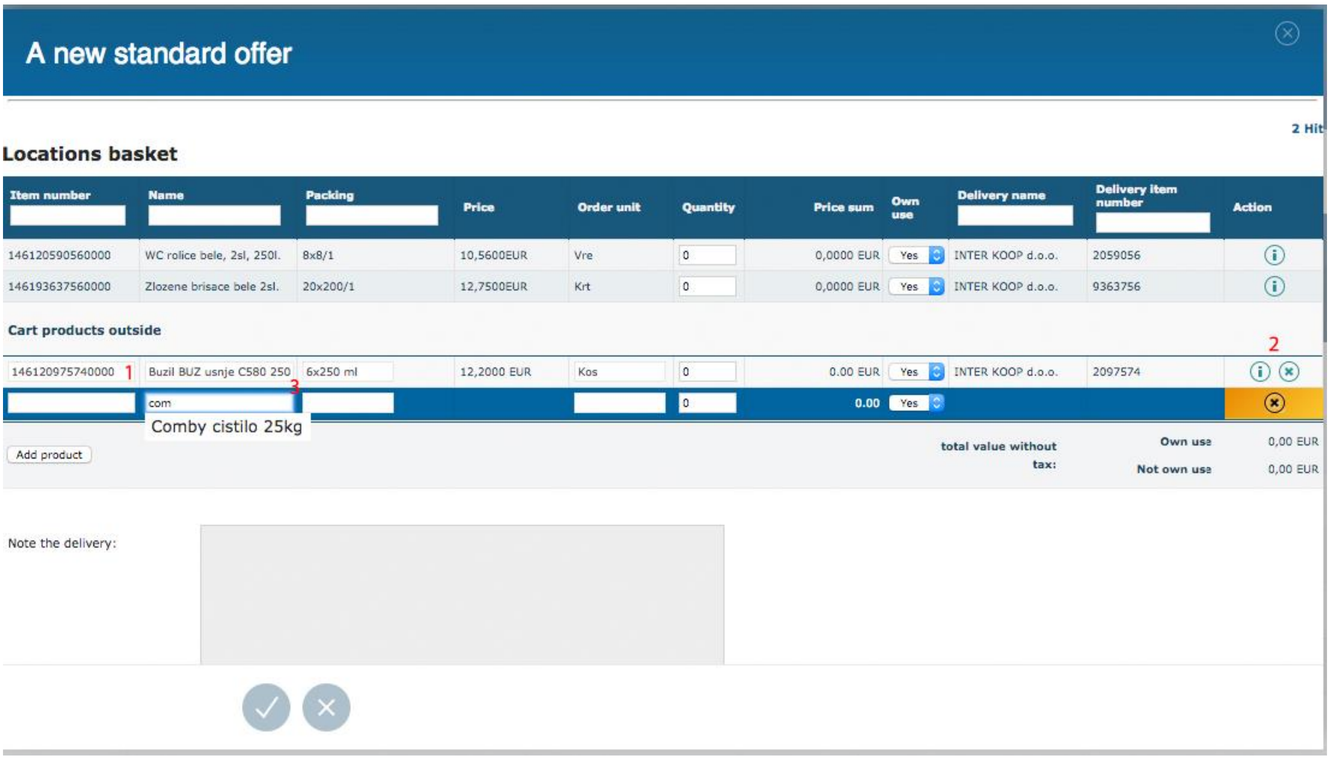
Add product 6 7 total value without tax: Own use 6.888,80 RON Not own use 0,00 RON

Note during approval:

Guide:

- **1**: Option – critical / urgent case
- **2**: Select customer's location (*„Client name"– „location address "*): For Admin users the full location list is accessable, for regular users those locations will be listed which are assigned to them.
- **3**: By selecting the client's location the location's basket will load immediately.
- **4**: The desired quantity can be added. The system will return with an alert if the quantity is 0.
- **5**: By clicking to this Info icon the product's page will be shown.
- **6**: The order can be extended with products which are not linked to the basket.
- **7**: Grand total of order.

Adding items outside of basket:



Guide:

- **1**: Product ID
- **2**: View product details or delete from the list.
- **3**: Product's name

Extra products can be added which are not linked to the location's basket. The desired extra product can be found by typing at least 1 character to the ID or Name field. (dropdown list)
If wrong product is selected it can be removed with the delete button at the end of the row.
By clicking the save button, a feedback pop up will appear which contains informations about the order. (monthly limit, approval info, order total)

The pop up's functions:

- Showing the grand total of the order (value).
- All relevant order limits and possible alerts are shown regarding the suppliers if the grand total is under the minimum order value. (nevertheless the order can be saved).
- Alert if the monthly order limit is reached. (only "own use" ordered products can decrease the client's monthly budget)
- New product alert if it is not part of the basket.

Notice: the approval logic can be customized regarding the individual needs. The standard approval logic is the following.

Standard orders need 1 level approval, when all parameters are correct and there is no need for further approval regarding this order. In this case the order is saved as „1 level pending approval" status.

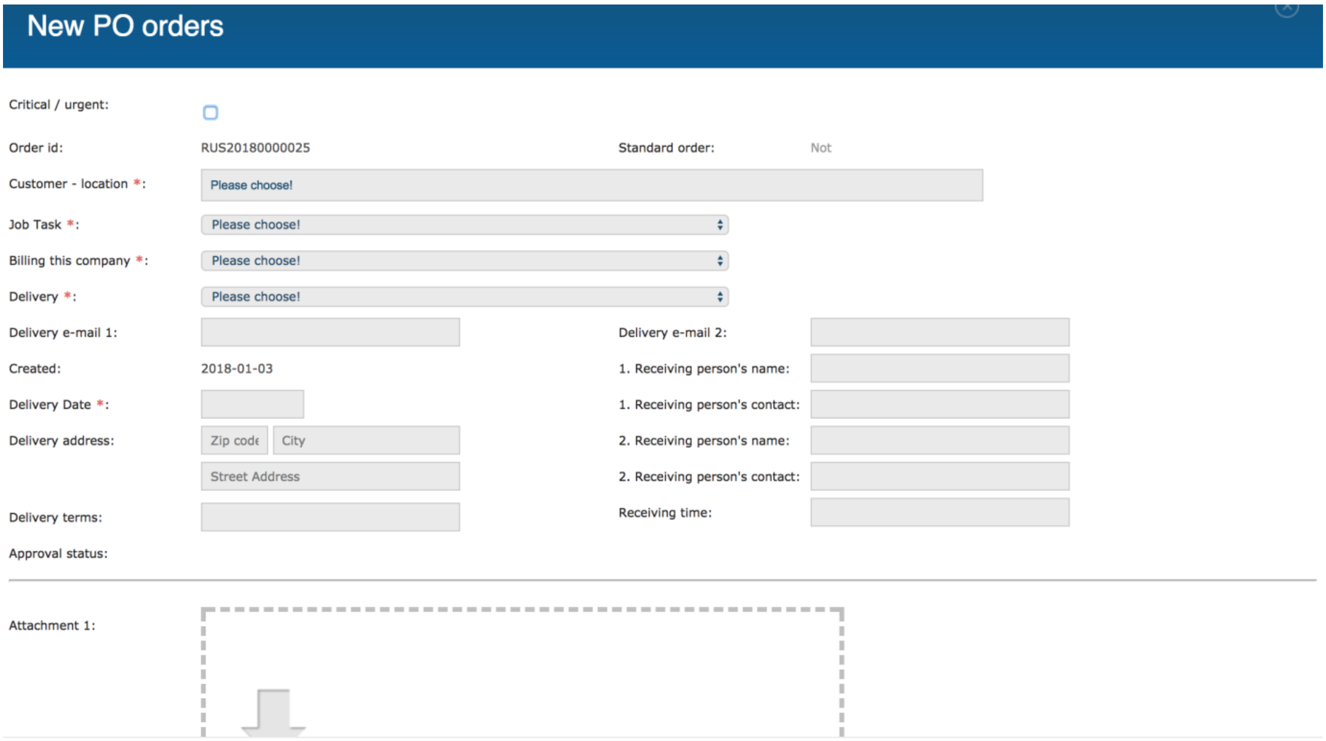
If any parameter of the standard order requires extra approval, level 2 approval will be set by the customer. In this case the order will be saved and status „level 2 approval" will be set.

After placing the order, the 1st level approving person will be notified by email about the order. Using the link in the email he/she can simply approve the order. 2nd and 3rd level approving persons will be also notified by email about the order's pending approval.

11.2 PO order

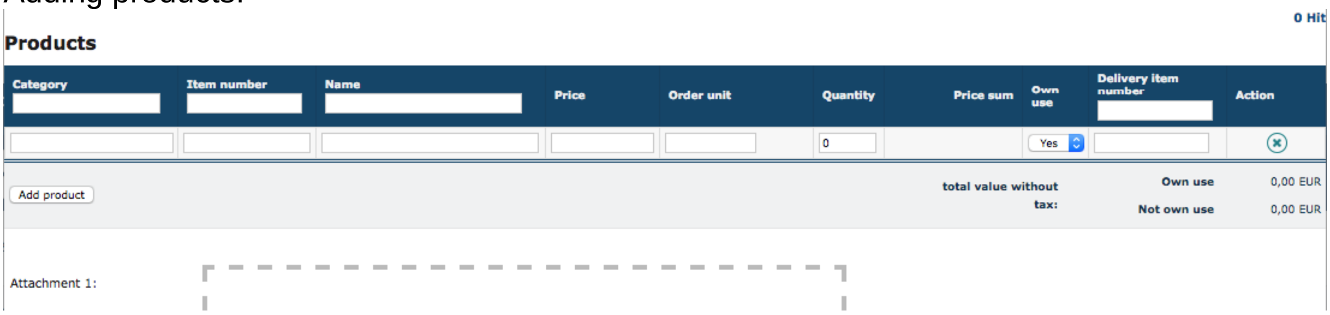
PO orders are such orders that consist of products from the temporary products list, or are completely new product and/or have new vendor.
Use the following button to add a new PO order:

PO order interface screen:



The PO order entry window is very similar to the standard order window. The only difference is the three attachment possibility.

Adding products:



- Category can be selected from a drop down list
- The other fields are -mandatory- free text input fields

You can delete a product which mistakenly added by using the delete button at the end of the row.

By clicking the (save) the system will alert you if manadory fields were not completed, and the missing fields will be highlighted with red border.

By clicking save a confirmation panel is presented. If the order will require approval the system will show the causes in a pop up message.

- The PO requires a 1 level approval if the order value is lower than 100 EUR.
- The PO requires a 2 levels of approval if the order value exceeds 100 EUR but is less than or equal to 500 EUR.
- The PO will require a 3 levels of approval if the order value exceeds 500 EUR.

After placing the order, the 1st level approving person will be notified by email about the order. Using the link in the email he/she can simply approve the order.

11.3 Approving orders

In the orders list you can see the „Approve” button at the end of the row if you have the rights to approve the item:

The approval process is the same for Standard and PO orders. After the actual level approving person approves the order, the next level person will be notified via email. Each approving person can add comments to the order or can modify the quantity of ordered item.

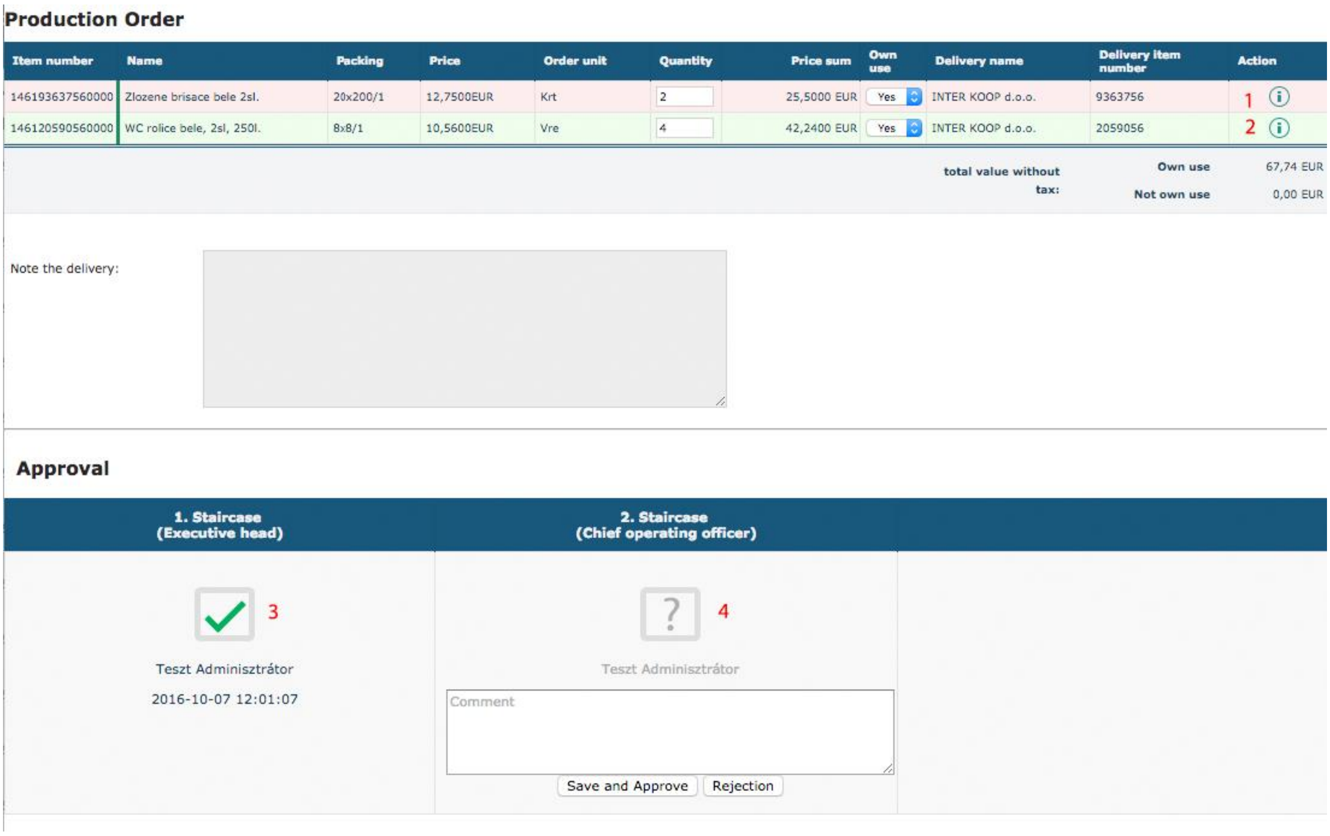
Sequence of order approval: 1st approve → 2nd approve → 3rd approve

If one of the approver rejects the order further approves are not accepted. In that case a new order has to be placed.

Approving persons can not add items to the order which the order does not contain.

If the order's content changed during the approval process the order's status will be set to "modified".

Approval user interface:

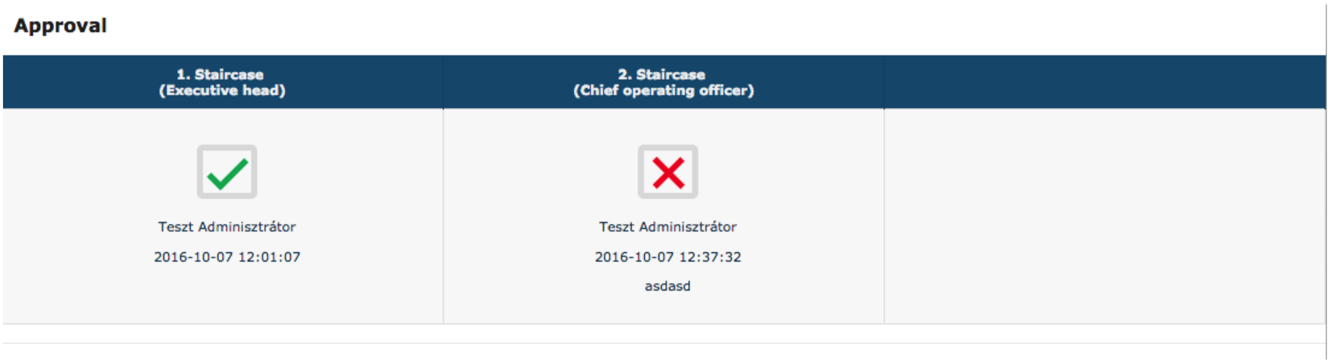


In this case the 1st level approving person approved the order, and modified the original quantity.

Guide:

- **1**: The original quantity was decreased by the previous approval person.
- **2**: The original quantity was increased by the previous approval person.
- **3**: Notes, comments of the 1st level approving person.
- **4**: Actual approval phase. The actual approving person can approve or reject the order.

Rejected order:



11.4 Deleting an order

Only administrators possess this feature. If the order already sent to the supplier, suppliers will be notified via email about the cancellation. Furthermore, in the supplier orders list the deleted / canceled status is also shown, and the delivery of the supplier’s order will be rejected.

11.5 E-mail notifications

The next approval person will be notified by email of his/her approval task.

Service managers, approving persons and clients will be notified about approved, rejected or modified orders.

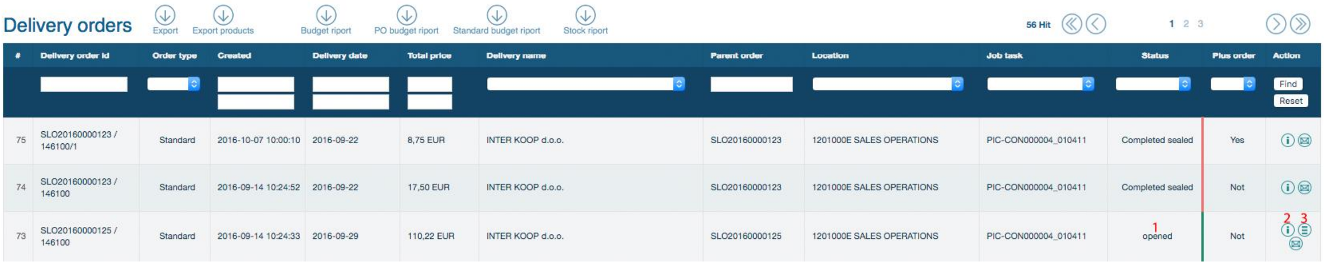
12. Supplier orders

12.1 List

After an order gets into 100% approved state the system will generate individual orders to the different suppliers and send them in e-mail with a PDF attachment.

The comments which was added to the order by the approving persons during the approval process will not be included.

The following screenshot shows an order where there are two different suppliers, therefore two separate supplier’s order will have generated.



#	Delivery order id	Order type	Created	Delivery date	Total price	Delivery name	Parent order	Location	Job task	Status	Plus order	Action
75	SLO20160000123 / 146100/1	Standard	2016-10-07 10:00:10	2016-09-22	8,75 EUR	INTER KOOP d.o.o.	SLO20160000123	1201000E SALES OPERATIONS	PIC-CON000004_010411	Completed sealed	Yes	
74	SLO20160000123 / 146100	Standard	2016-09-14 10:24:52	2016-09-22	17,50 EUR	INTER KOOP d.o.o.	SLO20160000123	1201000E SALES OPERATIONS	PIC-CON000004_010411	Completed sealed	Not	
73	SLO20160000125 / 146100	Standard	2016-09-14 10:24:33	2016-09-29	110,22 EUR	INTER KOOP d.o.o.	SLO20160000125	1201000E SALES OPERATIONS	PIC-CON000004_010411	opened	Not	

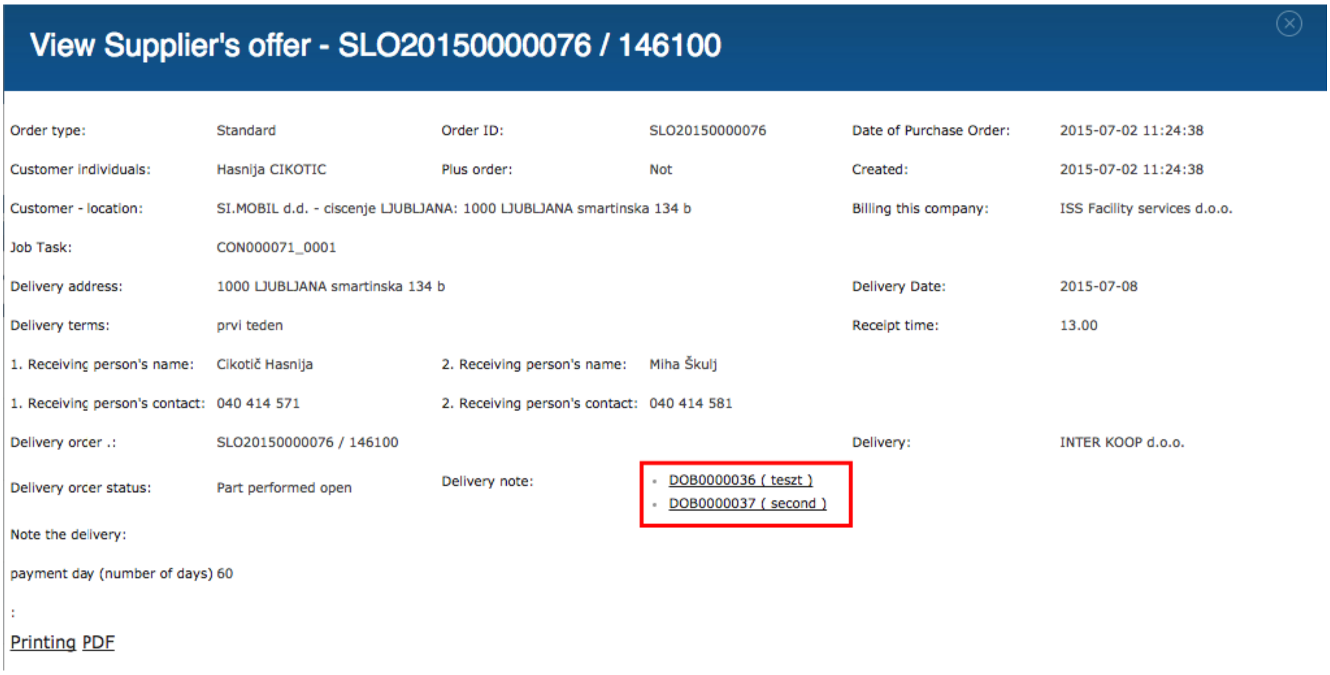
Guide:

- **1**: Green line, in case the order delivery has not happened yet (open or partially open status), red line if it has been closed.
- **2**: View order.
- **3**: Delivery / freight document creation.
- New function is: you can resend the supplier’s order by clicking the e-mail button.

12.2 View

Supplier orders can be viewed with details:

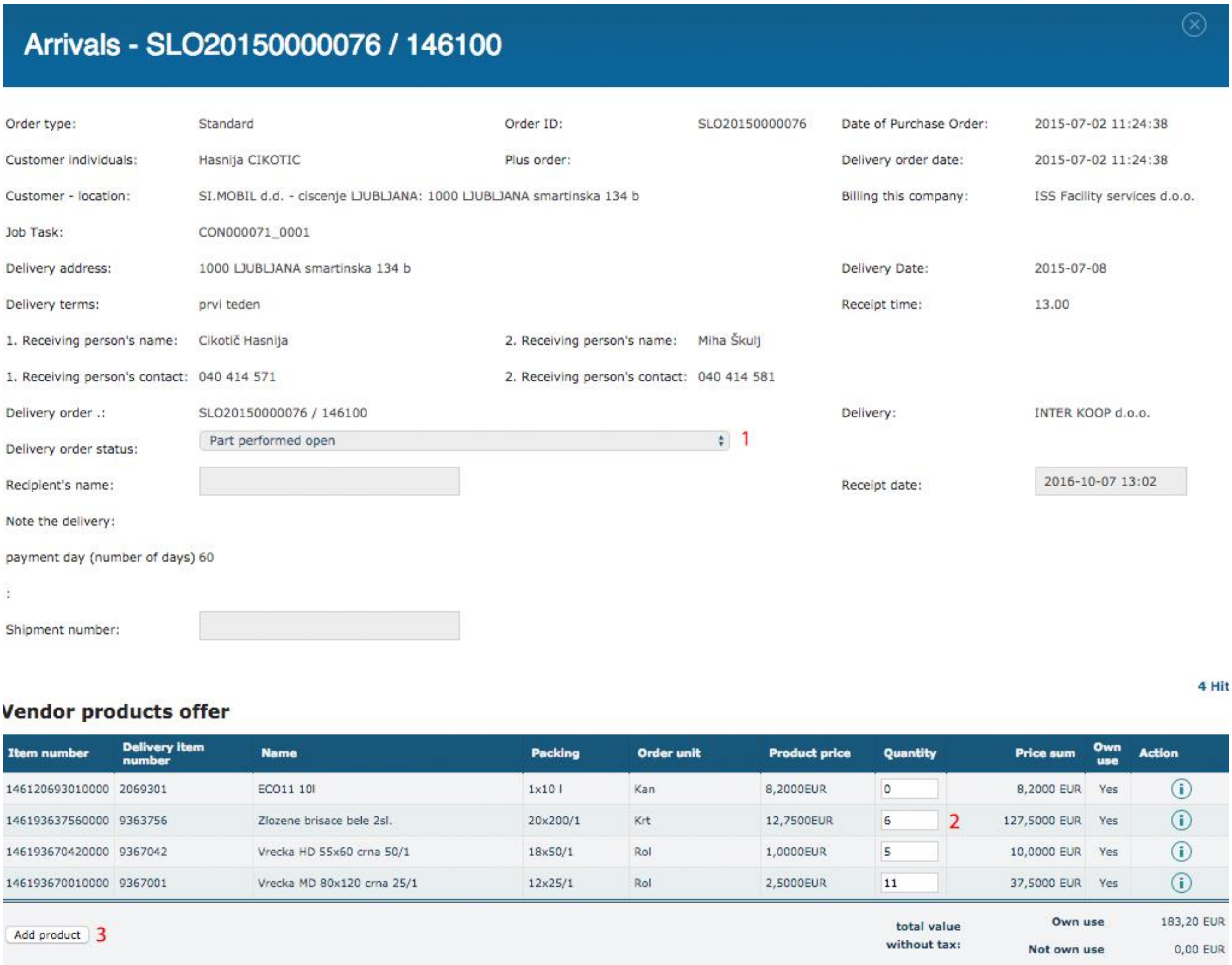
- Order form's data (supplier data, dates, IDs, etc)
- Details of the ordered products (data, quantities)
- The freight documents which were created during the shipment of the products.



13. Delivery

13.1 New delivery

You can create a new freight document using the „New delivery" button



Arrivals - SLO20150000076 / 146100

Order type: Standard
Order ID: SLO20150000076
Date of Purchase Order: 2015-07-02 11:24:38
Customer individuals: Hasnija CIKOTIC
Plus order:
Delivery order date: 2015-07-02 11:24:38
Customer - location: SI.MOBIL d.d. - ciscenje LJUBLJANA: 1000 LJUBLJANA smartinska 134 b
Billing this company: ISS Facility services d.o.o.
Job Task: CON000071_0001
Delivery address: 1000 LJUBLJANA smartinska 134 b
Delivery Date: 2015-07-08
Delivery terms: prvi teden
Receipt time: 13.00
1. Receiving person's name: Cikotič Hasnija
2. Receiving person's name: Miha Škulj
1. Receiving person's contact: 040 414 571
2. Receiving person's contact: 040 414 581
Delivery order .: SLO20150000076 / 146100
Delivery: INTER KOOP d.o.o.
Delivery order status: Part performed open 1
Recipient's name:
Receipt date: 2016-10-07 13:02
Note the delivery:
payment day (number of days) 60
:
Shipment number:

4 Hit

Vendor products offer

Item number	Delivery item number	Name	Packing	Order unit	Product price	Quantity	Price sum	Own use	Action
146120693010000	2069301	ECO11 10l	1x10 l	Kan	8,2000EUR	0	8,2000 EUR	Yes	
146193637560000	9363756	Zlozene brisace bele 2sl.	20x200/1	Krt	12,7500EUR	6 2	127,5000 EUR	Yes	
146193670420000	9367042	Vrecka HD 55x60 crna 50/1	18x50/1	Rol	1,0000EUR	5	10,0000 EUR	Yes	
146193670010000	9367001	Vrecka MD 80x120 crna 25/1	12x25/1	Rol	2,5000EUR	11	37,5000 EUR	Yes	

Add product 3

total value without tax: Own use 183,20 EUR
Not own use 0,00 EUR

By creating a new delivery, the following will appear:

- The header contains the data form the order (supplier details, dates, IDs, etc)
- **1**: When delivery is saved the original supplier order's status can be modified
- **2**: The delivery form will automatically show the original data from the supplier order form, product data, quantities. Quantities can be modified.
- **3**: Add a non-ordered product. Its operation is the same as described in the order chapter.

The orders can have the following 4 stauses:

- **Open**
- Partially delivered – **opened**
- Partially delivered – **closed**
- Completed **closed**

There is an option to recieve the **open** state orders. The “delivery” link is visible next to the supplier’s order until it achieves the “**closed**” status.

In case of supplier’s re-order a new individual insider freight document will be generated which can be modified by the admistrators. The “leftover” items from the original document will be offered when a new freight document is opened.

13.2 Excess shipment

In case of excess shipment, the user assigns the receiving form with a higher number for one (or more) products than the quantity of the originally ordered amount.
The excess items will be transferred to a new freight document, which will be saved with „excess delivery” status (in the future it can be sorted, listed).

The nsystem will automatically generate a regular order or PO for each created freight documents which is in “excess delivery” status.

The freight documents can be extended with additional products from standard or temporary product database (just those products can be added which are available from those suppliers). The products which were added this way will get onto a new “excess delivery” freight document. Whole new products (which were not contained by the original order and not available from the standard or temporary product list) can not added to the freight document.

If a freight document is extended with extra products (like the examples above) the system will open a highlighted warning message for the operator. After the operator clicks the “OK” button, a second confirmation and warning pop-up will appear where all the excessive amounts are listed to provide that any information will be missed by the operator.

So in case of excess shipment after a two factor confirmation the “excess delivery” freight document will be created with automatically generated regular order or PO.

The generated supplier order and PO also will get the “excess delivery” status. These “excess delivery” orders will automatically have assigned to the original order form.
The excess supplier order form will be also linked to the originating excess delivery freight document.
The automatically generated supplier order forms will not be sent to the suppliers via e-mail.

Example:

2 51	SLO20150000043 / 146100	Standard	2015-07-03 12:30:18	2015-06-30	156,55 EUR	INTER KOOP d.o.o.	SLO20150000043	LJU - 00 - Cleaning	CON000001_0100111	opened	Not	
1 50	SLO20150000077 / 146100	Standard	2015-07-02 11:31:11	2015-07-02	1,95 EUR	INTER KOOP d.o.o.	SLO20150000077	KRKA sENTJERNEJ	CON000215_0006	Completed sealed	Not	

After the order approval is finished, the supplier order is created (**2**) (XXX20150000043 / 146100).
During the delivery of this order there are more items shipped than originally ordered, therefore the system generates a supplier order with the excess delivery. Closed status is marked with (**1**) (XXX20150000077 / 146100).
Only the excess products will be contained by the generated order.

13.3 Job task management

You can add and modify a job task list in the system. Job tasks are uniqe short codes. Job task are used (attached) for standard and PO orders as mandatory data.
Job tasks are related to locations.
If an order is placed to a specific location, only the related job tasks could be chosen from the drop down list.