POM TRAINING DOCUMENT (SUPPLIER) FOR

ASMPT

FEBRUARY 2024

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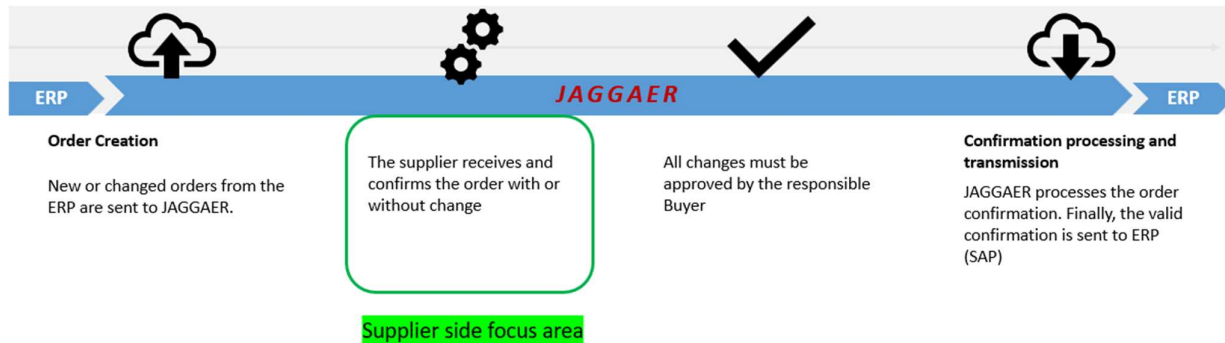# 1. Introduction

The JAGGAER Purchase Order Management process supports the distribution of purchase orders (POs) from the ERP to the supplier and requesting the Order confirmation (OC) from the supplier to be send back to the ERP.

This is the training document created for ASMPT to successfully train **Suppliers** to use POM (Purchase Order Management) Module in Jaggaer. This document has detailed description of Interface, filters, PO status and activities that suppliers can do.
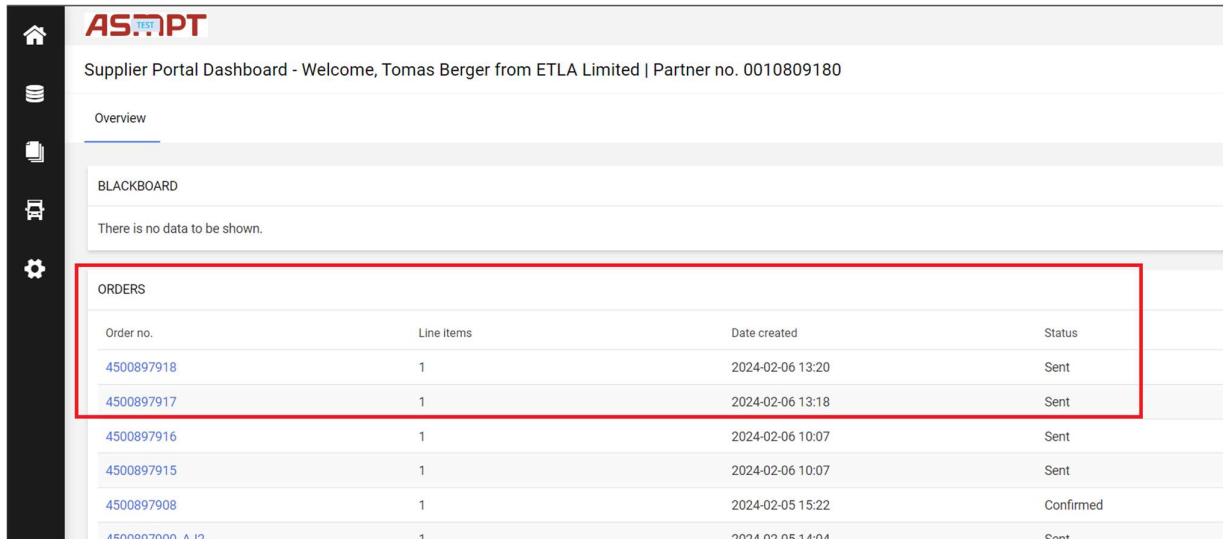
High Level Process Overview for POM on Supplier side

Order Creation

New or changed orders from the ERP are sent to JAGGAER.

The supplier receives and confirms the order with or without change

Supplier side focus area

All changes must be approved by the responsible Buyer

Confirmation processing and transmission

JAGGAER processes the order confirmation. Finally, the valid confirmation is sent to ERP (SAP)

2. Navigate to the POM module and POM Interface

Step 1: "MY JAGGAER" is supplier´s start page, where supplier can navigate to POM module by two ways,

      a. "ORDERS" Quick Link on right side
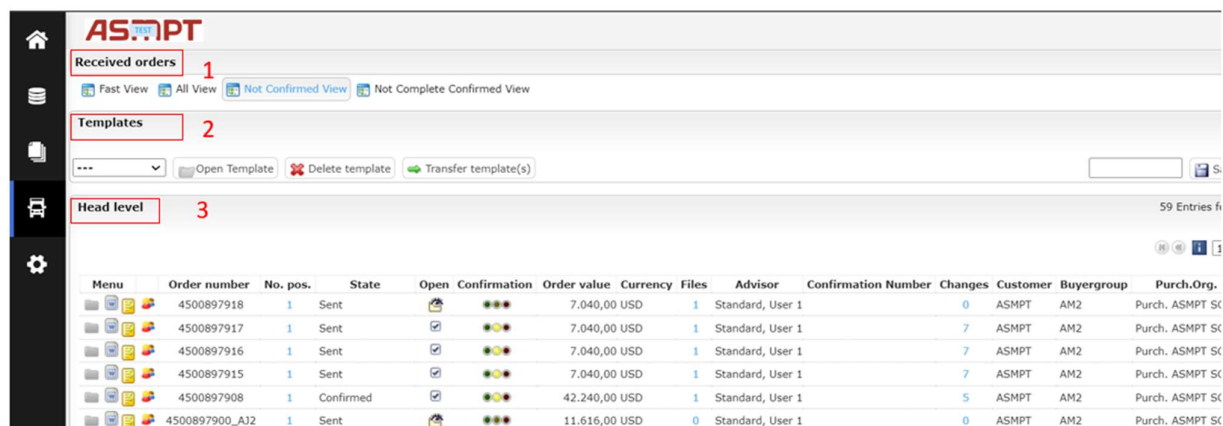
      b. Via SCM→ Direct Purchase Orders → Order list/Position List

This opens the working area on the right-hand side with the following structure:

1. At Top - Received orders, with Standard filter functionalities i.e.,

Received orders

Fast View   All View   Not Confirmed View   Not Complete Confirmed View

- **Fast view** - Here you can see the orders of the current month.
- **All View** - Here you can see All the Orders in All status.
- **Not confirmed view** - Here you can see all not confirmed orders which are in sent status.
- **Not Complete confirmed view** - Not completely confirmed orders (not available on position level).

2. Middle – Templates: could be used by the supplier to create an own template with the list of columns to be visible/hidden. That template can be transferred to other supplier contacts.

3. Bottom - Predefined structure levels, such as Head, Position, or Disposition level.

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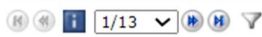
The total number of available pages are shown, and you can navigate to the following page or last page.

The **Filter** icon allows you to use the Filter functionality, and therefore view or hide filter options. By using this function, you can define the filter functionality by order number, material, plant, etc.,

Head level

Order number	
JAGGAER Direct ORDER ID	
Customer	
State	---

Filter expand   Show

Alternatively, a more detailed filter criteria can be set:

1. Click the Filter expand button.

2. Enter the appropriate filter criteria.

3. Click the Show button to display the result list

3. Some Important Columns Under Head Level

1. **Menu Function Header level for Order action and confirmation status:**

Supplier can perform following actions from Menu Order Actions:

Open - Open the purchase order template in another window.

Position Level - Change to purchase order view on position level.

Disposition Level - Change to purchase order view on disposition level.

Forward to another user - Allows you to forward the purchase order to another user. Choose the user to forward the purchase order to (first name and last name) and enter a comment.   Click   Forward.
The history of forwarding actions is available with the fields as changed by, user, to user, date, and type.

2. **The "State" column shows the current state of PO from following:**
   - Sent - Order sent to supplier.
   - Confirmed - Supplier confirmed the whole PO.
   - Partially confirmed - Supplier confirmed only specific items in the PO.
   - Declined - PO was declined by supplier / buyer.
   - Cancelled - PO was deleted by buyer.

3. **Order Number:** It is PO number which is coming from SAP.

4. **Supplier Name and Supplier Nr:** Name of supplier and supplier number is also coming from SAP

5. **Open**: Indicates if the supplier has opened the order on the supplier portal.

   Supplier last visit + date and time stamp - Supplier has opened / read the purchase order.

   Not opened - Purchase order has not been opened / read.

   Response sent - Purchase order was edited / confirmation was sent.

6. **Following are the confirmation status of an order with a traffic light:**

Not confirmed - Purchaser order is not confirmed / open.

Confirmed - Purchaser order is confirmed.

Partially Confirmed - Purchaser order is partially (at least one item) confirmed.

Declined - Purchaser order is declined.

7. **Changes**: The number of changes done for this purchase order (including all details as a change log). By clicking on the Changes number, the details of the change log pop-up:

- Pos. - Indicates the position number (e.g. 0010).
- Changes - Date and time stamp.
- Order was changed by - Supplier or customer.
- Level – Position / Disposition.
- Changed item - Field (quantity, delivery date, costs as price, or comments) was changed.
- Old value - The initial value before the change was done.
- New value - The new inserted and saved value after the change was done.

4. Supplier activities in JAGGAER Portal

Step 1: GO to Purchase Order via,

    a. SCM→ Direct Purchase Orders → Order list/Position List → Use filter functionality to find your PO as shown below

    b. Click on the link you received in email notification.

Step 2: Open PO by clicking on Open in Menu section.

Step 3: Now the PO will open in new window, and it looks like following. And In order to take further take further action, supplier needs to open the document by clicking on it.

Step 4: Once the document is open now supplier has following Options:

1. Confirm the PO without any changes: We need to add Confirmation Number and directly clicking on "save and send back".

Then you will get following pop up, click ok to confirm.

Click Ok to conform

Now the order confirmation is successfully saved.

Once the PO is confirmed the state of PO is changed to "Confirmed".

2. Confirm PO with changes: Supplier can change Quantity, Delivery date or Price and add remark as per requirement and then click on "Save and Send back" the Order confirmation.

Then you will get following pop up, click ok to confirm.

Now the order confirmation is successfully saved.

After making changes to PO and sending Order confirmation, buyer will receive the notification via email regarding the changes and remark. Then he could log in and approve/decline the changes.

3. Split the position.

   If you want to split the position first you must click on Split option, then you can add the quantity and delivery date to split position.

Then you will get following pop up, click ok to confirm.

Now the order confirmation is successfully saved

After making changes and sent PO back, buyer will receive the notification and he needs to approve the changes to Confirm the PO.

4. Decline the PO

To Decline PO it is mandatory to write Remark of decline and click on Decline

Once the PO is declined Buyer will receive an Email Notification and can see the remark for Decline.

5. Supplier contacts, roles, email notifications

ASMPT invites one supplier contact to register on the supplier portal. This supplier contact is acting as the administrator who is completing the supplier registration.
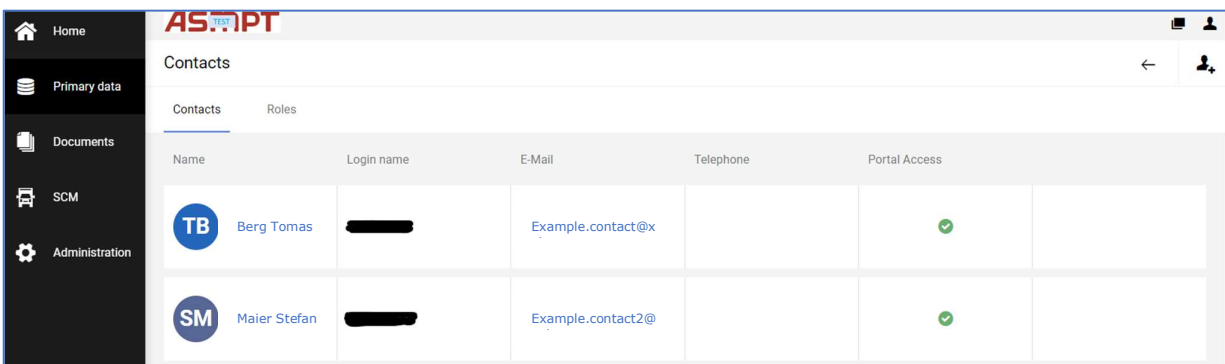
This admin supplier contact can also assign an additional supplier contact(s) who will also be able to confirm purchase orders received.

How to find supplier contacts in the portal

Click on **Primary Data → Contact People**
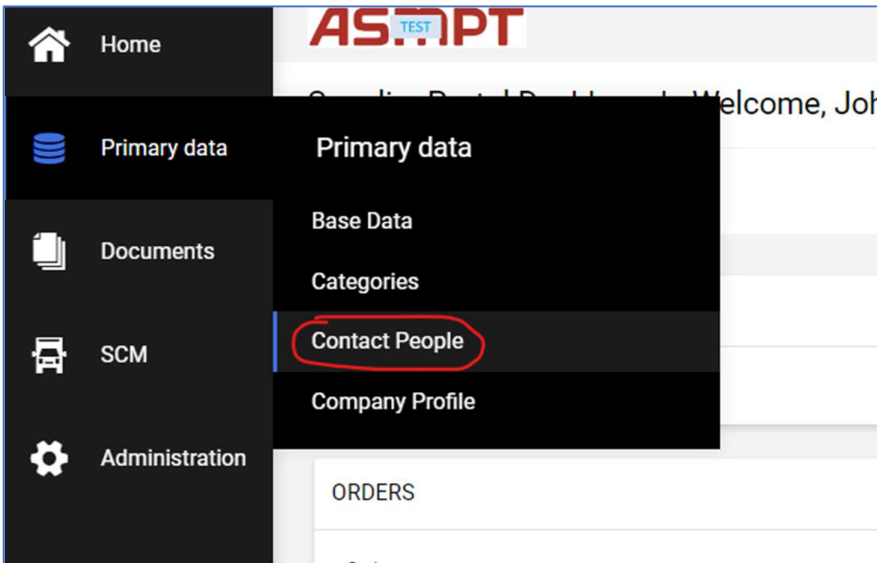
The list of supplier contacts will be displayed.

Click on the person icon with the plus button on the right-hand side of the screen to add new supplier contact.

 Enter the supplier contact details, enable the Portal access for him/her and tick the "JD Smart :: Supplier" tick box referring to the suppliers permission. Then click Save button.
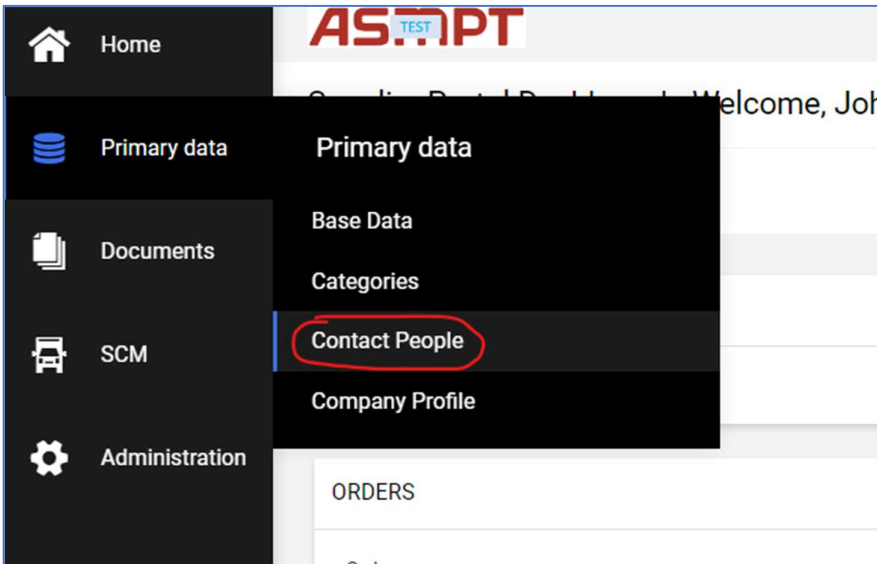

The email notification with the login details will be triggered and sent to this new supplier contact person.

In order for this new supplier contact person to be able to receive email notifications about new orders sent by ASMPT and to confirm those orders, the supplier admin needs to perform one more activity which is assigning the "Order Confirmation" role to this newly created supplier contact.

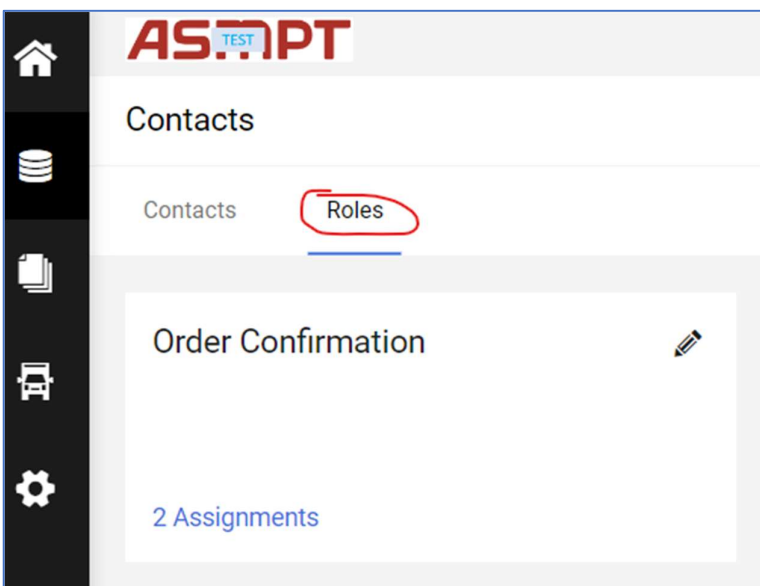Once again click on **Primary Data → Contact People**

The list of supplier contacts will be displayed.

Click on the "Roles" tab.

There is "Order Confirmation" role created. Every supplier contact assigned to this role is receiving all the email notifications about the POs and has a permission to confirm the order.

Click on the pencil icon on the right-hand side.
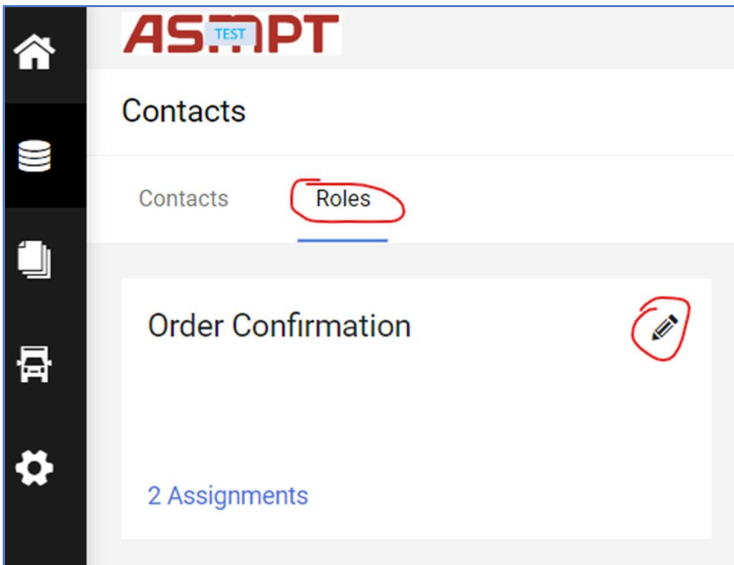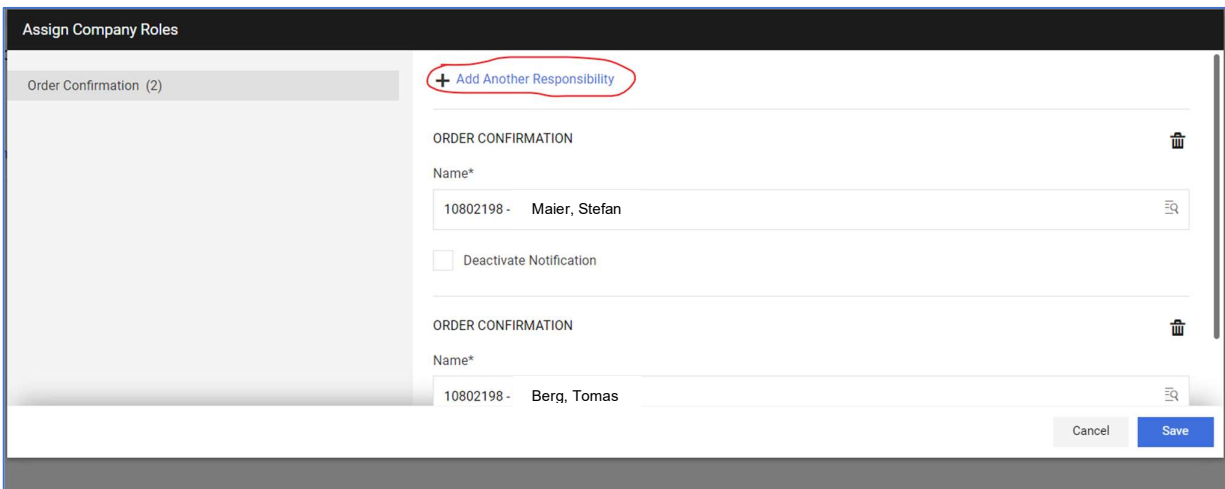

The list of supplier contacts assigned to the Order Confirmation responsibility gets displayed. Click on "Add Another Responsibility"

The new field with entering the new supplier contact with the Order Confirmation role gets populated. Select the newly created user from the dropdown list and click Save.

By default all the users with the Order Confirmation role are receiving all the PO related email notifications.

However, if the supplier wants to keep his/her permission to confirm orders, but doesn't want to receive any email notifications, he/she can deactivate it in roles area by checking the "Deactivate Notification" tick box.