NNS – SCP Training

Purchase Orders and RFQ under NNS Supply Chain Platform
SCP - Agenda

- Overview of Purchase Order and RFQ documents
- Searching for Purchase Order and RFQ information
- Printing Purchase Order and RFQ Documents
- Responding to a Purchase Order/RFQ
NNS SCP Training

Overview of SCP
PO Business Processes

1. **Purchase Order/RFQ:** NNS publishes firm purchase orders or request for quotes to you as the Supplier

2. **PO/RFQ Responses:** Suppliers can accept, recommend changes, or reject orders. For RFQs you can choose to bid or not bid.

3. **Purchase Order Changes/RFQ changes:** NNS can publish changes or cancellations to orders and RFQs. As a supplier, you can respond to the changes.
States

- A **state** represents the status of the document in SCP
- PO's/RFQ's have a state at the header level and each line item level
- PO's/RFQ's sent to SCP by NNS are in a '**New**' state
## States within NNS SCP – Purchase Orders

<table>
<thead>
<tr>
<th>State</th>
<th>Operator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Buyer</td>
<td>Buyer has created a PO in backend system</td>
</tr>
<tr>
<td>Updated</td>
<td>Buyer</td>
<td>Buyer has made a change in backend system</td>
</tr>
<tr>
<td>Acknowledge with Exceptions</td>
<td>Supplier</td>
<td>Supplier has viewed and made changes to the PO</td>
</tr>
<tr>
<td>Accepted</td>
<td>Supplier</td>
<td>PO is being approved “as is”</td>
</tr>
<tr>
<td>Rejected</td>
<td>Supplier</td>
<td>PO is considered unacceptable “as is”</td>
</tr>
<tr>
<td>Closed</td>
<td>Supplier</td>
<td>Buyer has decided close the line item</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Buyer</td>
<td>Buyer has decided to terminate the order line</td>
</tr>
<tr>
<td>Archived</td>
<td>System</td>
<td>System has archived the Purchase Order after a set period.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• ‘Cancelled’ 21 days,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 180 days beyond Request Delivery Date</td>
</tr>
</tbody>
</table>
## States within NNS SCP – RFQ

<table>
<thead>
<tr>
<th>State</th>
<th>Operator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Buyer</td>
<td>Buyer has created an RFQ in backend system</td>
</tr>
<tr>
<td>Updated</td>
<td>Buyer</td>
<td>Buyer has made a change in backend system</td>
</tr>
<tr>
<td>Bid</td>
<td>Supplier</td>
<td>Supplier has inserted a price and chosen to bid on item.</td>
</tr>
<tr>
<td>No Bid</td>
<td>Supplier</td>
<td>Supplier has chosen not to bid on the item.</td>
</tr>
<tr>
<td>Closed</td>
<td>Supplier</td>
<td>Buyer or system expiration has closed the RFQ</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Buyer</td>
<td>Buyer has decided to terminate the RFQ</td>
</tr>
<tr>
<td>Archived</td>
<td>System</td>
<td>The System has moved archived the RFQ after a period of time.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• ‘Cancelled’ &gt; 21 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 90 days beyond RFQ deadline</td>
</tr>
</tbody>
</table>
PO/RFQ States - ‘New’ to another state

• Suppliers take action on a PO/RFQ by changing the state of the line items under the order. This will result in a PO response being generated to NNS.

• Options for the Supplier for Purchase Orders
  > Accepted – Supplier agrees to complete request from NNS
  > Acknowledge with Exceptions: Supplier responds with a counter proposal (i.e. a different promise quantity, date, or price)
  > Rejected – Supplier believes the request is invalid
    – Only use the reject when you DO NOT want to enter into a contract

• Options for the Supplier for RFQ
  > Bid – Supplier enters a price and chooses to bid on the item
  > No Bid: Supplier chooses to not bid on the item.
NNS - SCP

Search for Purchase Orders
Three Search Options

• **My Workspace Page**
  > See a list of POs/RFQs that are a **specific status**
  > Example: *Show me all of my “New” POs*

• **Search Page**
  > Find POs/RFQs that match specific **search criteria**
  > Example: *Show me POs for Account ‘ABC’ from January*

• **Summary Page**
  > Find POs/RFQs through **search criteria**, and then list them by **status**
  > Example: *Show me POs for Account ‘ABC’ from January – listed by status*
Some Searching Tips

- Use an asterisk as a wildcard
  > Example: Air* will show Aircraft and Airplane

- Search is case-sensitive
  > Helpful Hint: Use the wildcard for first letter
  > Example: *irplane will show airplane and Airplane

- Use a comma to search multiple items in one field
  > Example: Chicago, New York will show data for both cities
  > Helpful Hint: If some data is in all caps use the comma
    - Example: Chicago, CHICAGO
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Demonstration: Search for PO’s
Searching for PO – My Workspace

Select My Workspace
Searching for PO – My Workspace

1. Select My Workspace
Select between RFQ or Purchase Orders
Searching for PO – My Workspace

Select an Order State
Searching for PO – Search Page

1. Order Management
   - Discrete Order Search
     - Search

Additional fields for search include:
- PO Number
- Buyer Account
- PO Date
- Change Order Sequence
- Change Order Date
- Contact Person
- Supplier Company
- Supplier Number
- Supplier Contact
- Schedule Status
- Schedule Last Modified
- Material Number
- Item Description
- Supplier Item Number
- Our Reference Number

Options for filtering and saving search results.
Searching for RFQ – Search Page
Searching for PO – Summary Page

Select an Order State

<table>
<thead>
<tr>
<th>Status</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>564</td>
</tr>
<tr>
<td>Updated</td>
<td>243</td>
</tr>
<tr>
<td>Supplier Rejected</td>
<td>4</td>
</tr>
<tr>
<td>Acknowledged with Exceptions</td>
<td>37</td>
</tr>
<tr>
<td>Accepted</td>
<td>24</td>
</tr>
<tr>
<td>Archived</td>
<td>83</td>
</tr>
<tr>
<td>Closed</td>
<td>2</td>
</tr>
<tr>
<td>Cancelled</td>
<td>3</td>
</tr>
</tbody>
</table>
Select an RFQ State
Printing Purchase Orders and RFQ
Printing an Order at the Order Details page

1. At the Order Details page, click the **Summary Print** button
   > This allow you to save a copy of the Summary PO in PDF format
   > Choose the **Document Type**

2. Click **Proceed**
Batch Printing from the Print Orders Page

From the Print Orders page, users can enter their search criteria to pull back groups of order lines to print.
Batch Printing from the Print Orders Page

The application will return a list of orders which match that search criteria.

1. Select the orders you would like to print
2. Select the summary Print
3. Open the .pdf
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Responding to a PO
Two Response Options

- **From the Purchase Order List** *
  > Respond to schedule lines across multiple orders in the list page either individually or batch.

- **From the Purchase Order Details** *
  > Respond to one or more schedule lines under a single POs
Response via the Purchase Order List Page

- Users have the ability to Batch Accept order lines from the PO List Page
  > Select the check box on the lines they wish to response and click the associated Accept/ Acknowledge With Exceptions/ Reject
Response via the Order Details Page

- Users have the ability to Accept order lines for single orders under the Order Details Page
  > Select the check box on the lines they wish to respond and click the associated Accept/ Acknowledge With Exceptions/ Reject
Response via the Order Details Page

• Buttons will **NOT** appear if the following states are visible on the details or list page:
  > Archived
  > Closed
  > Cancelled

• By filtering to one of these states, the response buttons will be visible
  > New
  > Accepted
  > Acknowledge With Exceptions
  > Supplier Rejected
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Accept a PO
Accept and send a response

• Process to Accept PO
  > Locate PO – use search or My Workspace
  > Check PO Details
  > If agree with PO, select all of the line items
  > Click Accept button
  > All lines change to ‘Accepted’
  > The entire PO (header level) changes to ‘Accepted’

Note: to accept multiple PO’s at once, see the demonstration called ‘Batch Accept Orders’
Accept and send a response

Click the schedule line you want to respond

Select Accept
Accept and send a response

Line is now “Accepted”*

*Filter was applied to view this schedule line.
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Acknowledge with Exceptions
Click the schedule line you want to respond

Select Acknowledge with Exceptions
Because this is an Acknowledge with Exceptions a “Supplier Message” is required
PO Response – Acknowledge With Exceptions

1. Click the “+” sign to Open the Header details and

2. Click the Supplier Message “create” and enter the message in the associated pop-up
PO Response – Acknowledge With Exceptions
Once the message has been created, you will be able to “Acknowledge With Exception”
Line is now “Acknowledge with Exception”*
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Responding to an RFQ
Response to an RFQ via the UI

- Once a supplier has chosen to bid or no bid on an item, they cannot change their response.

- If you want to change your response, an updated RFQ will be required from NNS. Please contact your buyer for further information.

- The default supplier price on an item is “0”. As a supplier, be sure to update the supplier price if you want it different than “0” on a bid action.
Three Response Options

• **From the RFQ List** *
  > Respond to schedule lines across multiple orders in the list page either individually or batch.

• **From the RFQ Details** *
  > Respond to one or more schedule lines under a single RFQ

• **From the RFQ Upload** *
  > Respond to one or more schedule lines under a single RFQ through Excel upload.
Users have the ability to Batch Bid on RFQ from the RFQ List Page

1. Select the check box on the lines they wish to response and click the associated Bid / No Bid
2. Important to note the default bid price is “0”, be sure to update the price or you will need to call NNS to send out an updated RFQ.
Response via the RFQ Details Page

- Users have the ability to Bid/No Bid on RFQ the RFQ Details Page
  - Select the check box on the lines they wish to response and click the associated Bid/No Bid
  - Important to note the default bid price is “0”, be sure to update the price or you will need to call NNS to send out an updated RFQ.
Response via the Excel Upload

• The system now allows a supplier to upload their RFQ response by Excel Upload. This provides the ability for the supplier to work on the response offline and upload back into the system when ready. There are certain limitations and constraints outlined in this section which the supplier will need to follow.

• **File Constraints:**
  > Excel version 2003-2007
  > Extension = .xls

• **Steps:**
  1. Download Excel Response File
  2. Update File
  3. Upload version
Response via the Excel Upload – Step 1: Download

- Enter your search parameters, then click ‘Search to Download’

- Click Next

- Click the refresh (    ) icon until the Status shows ‘Completed’
Response via the Excel Upload – Step 1: Download

- Click the refresh ( ) icon until the Status shows ‘Completed’

- Click the link under the File Name, then click ‘Open’

- The RFQ should then open in Excel
Response via the Excel Upload – Step 2: Update Sheet

- Fill in the Excel spreadsheet with your responses to the RFQ
  - Information may be entered into the following Columns only: ‘Action’, ‘Supplier Price’ and ‘Supplier Notes’
  - Only ‘Bid’ or ‘No Bid’ may be entered into the ‘Action’ column (this field is case sensitive)
  - Only numeric values containing 2 decimal places may be entered into the ‘Supplier Price’ field
  - The ‘Supplier Notes’ column is optional
  - Any information entered under columns other than ‘Action’, ‘Supplier Price’ and ‘Supplier Notes’ will be ignored by the system upon upload

- Once you have finished filling in your responses, save the Excel spreadsheet to your computer
Response via the Excel Upload – Step 3: Upload Sheet

- **Upload your RFQ response**
  > Click the ‘Browse’ button to browse to the location you saved your completed RFQ response spreadsheet, then click ‘Next’

> Click the refresh ( ) icon until the Status shows ‘Completed’

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• The process is now complete, and your RFQ response has been sent to the buyer. If you search for the RFQ in SCP, you should now see the values that you entered into the spreadsheet.