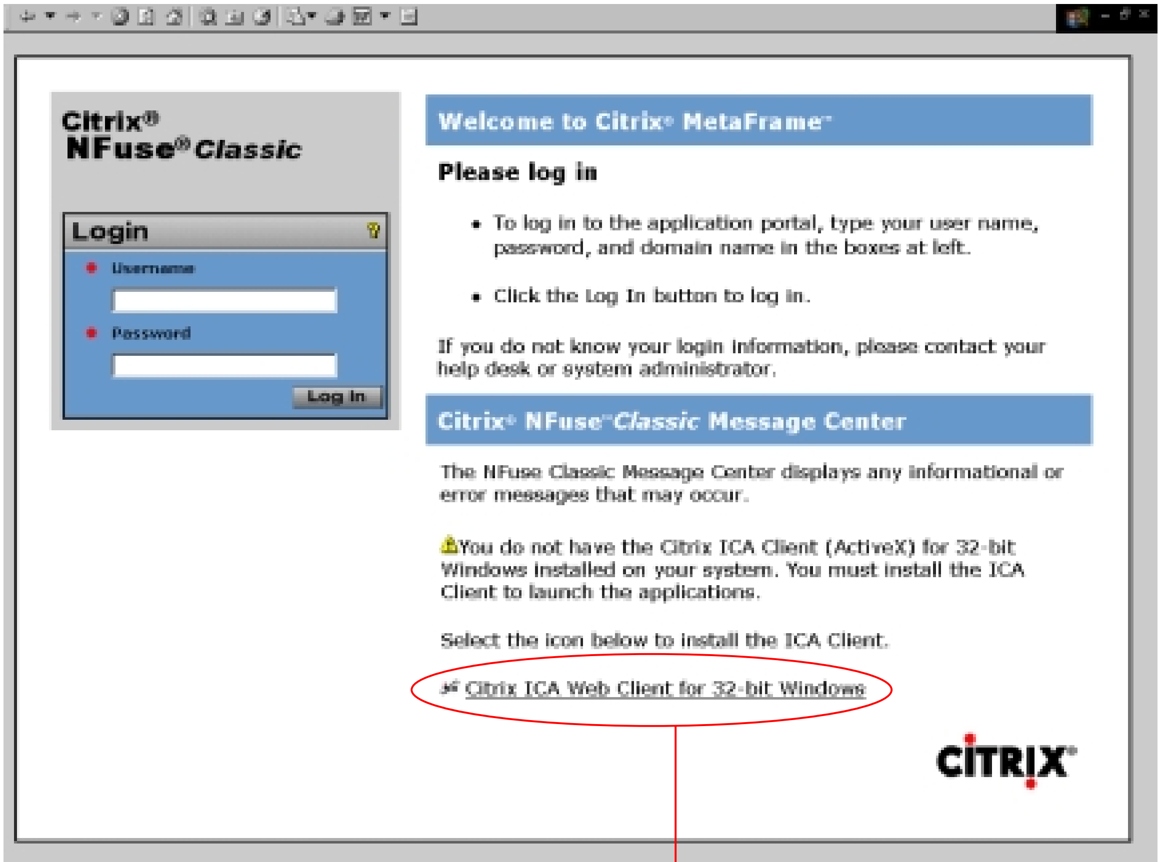
DV Connect (Version 1)

Vendor Transaction Platform

Table of Contents

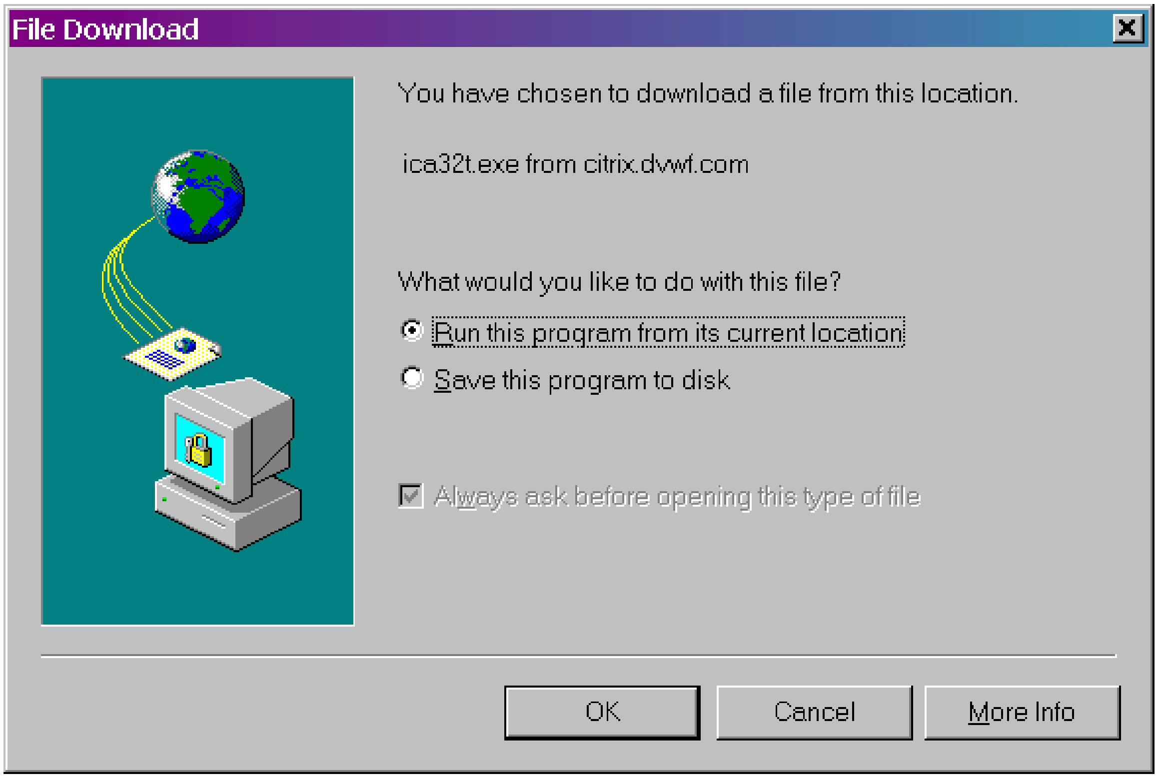
Citrix Download

- Open Internet Explorer & type citrix.dvwf.com in the address section then press the Go button or the Enter key and the screen below will appear.

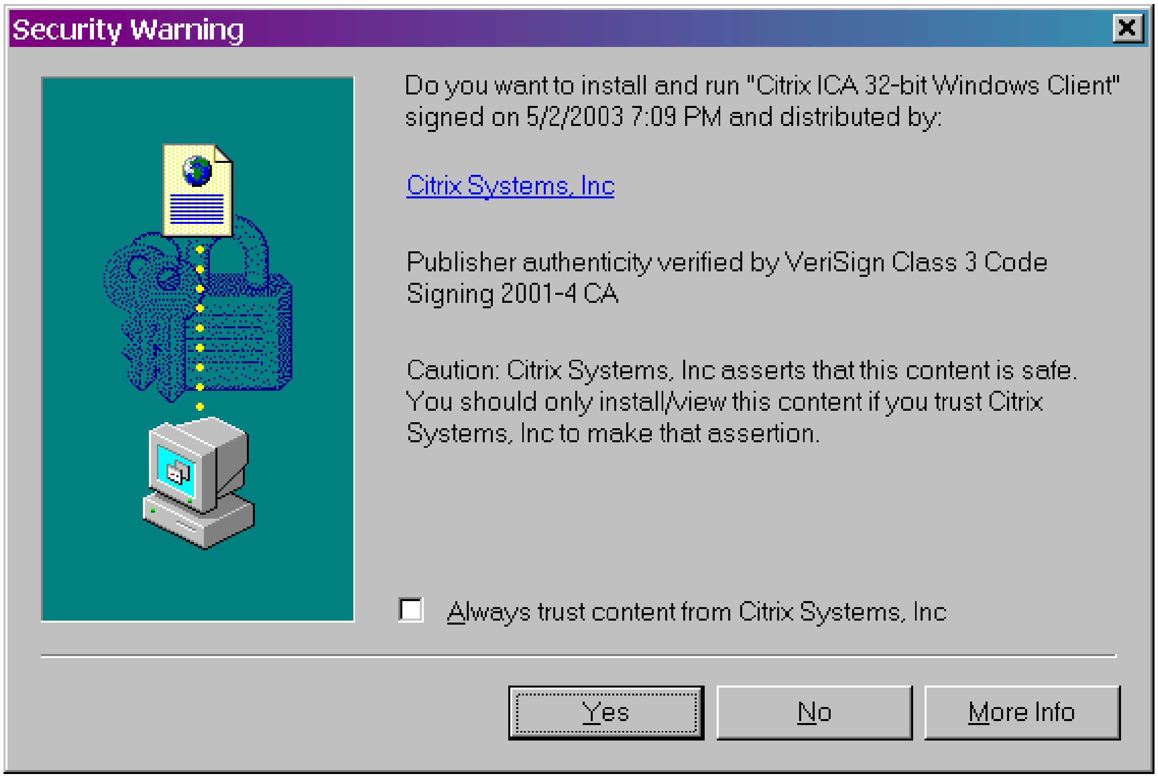


Click on this link to download the ICA Web Client

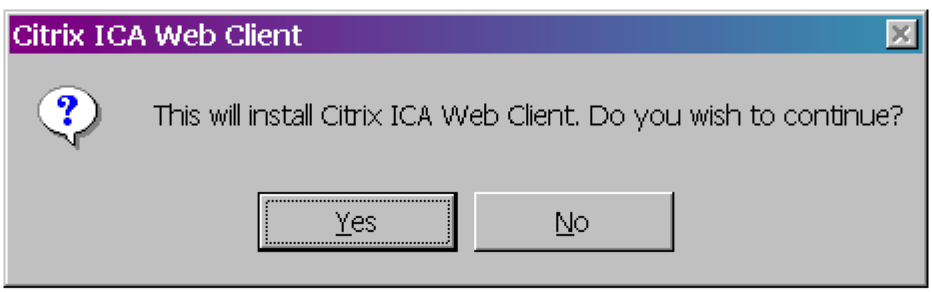
- The next screen to pop up is the File Download screen. On this screen you'll want to select the "Run this program from its current location" toggle box then click the OK button



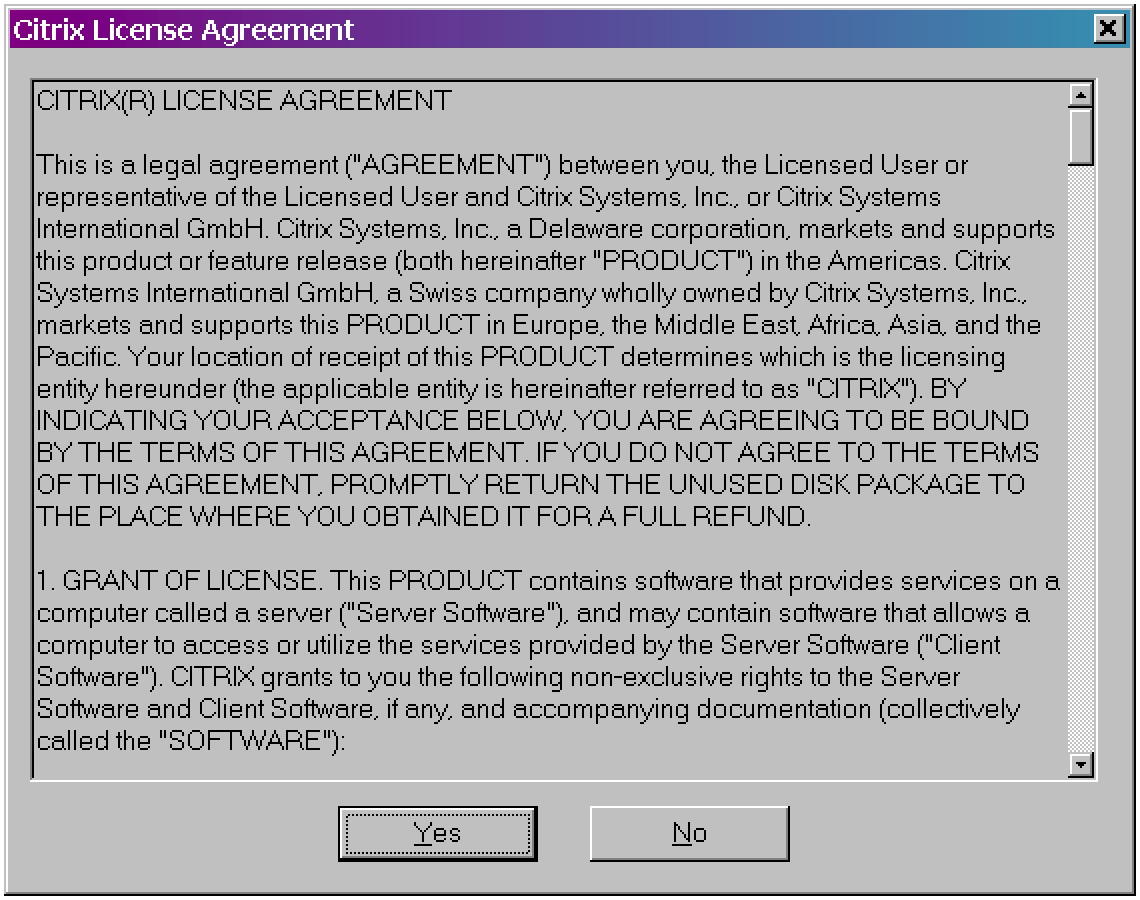
- Next you might get this Security Warning box. If it comes up click the Yes button



- Next you will get the Citrix ICA Web Client box, click Yes.



- The next screen that comes up will be the Citrix License Agreement, click Yes

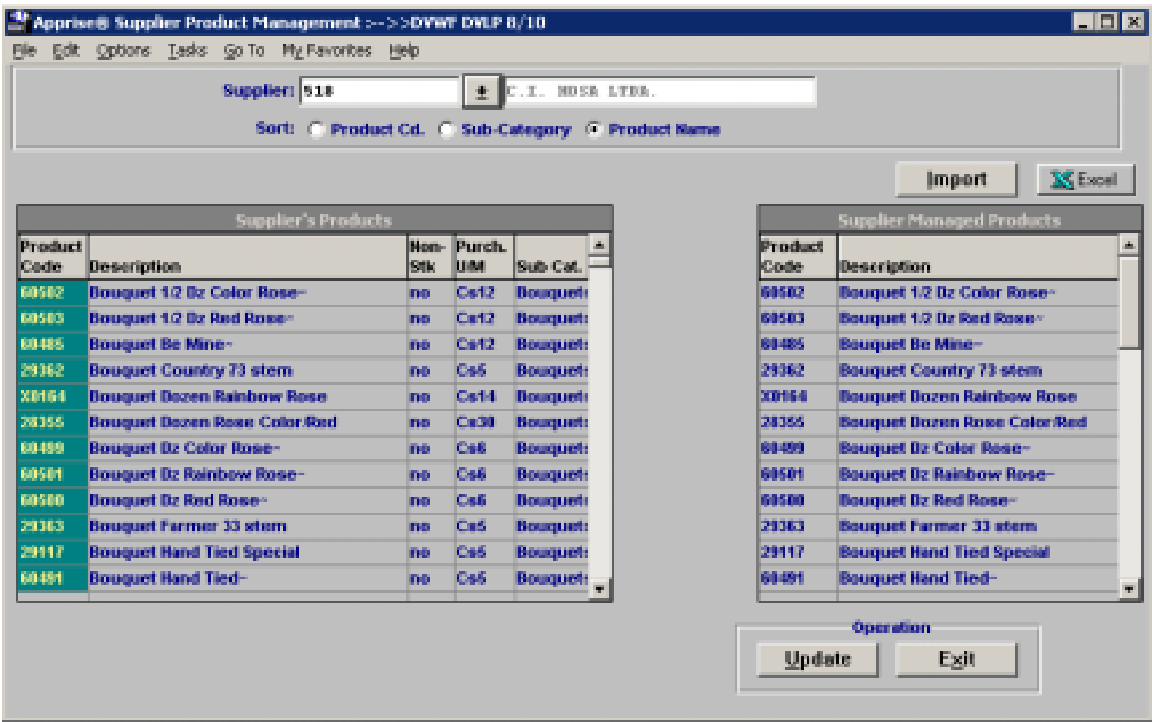


- And finally the Citrix ICA Web Client setup completed successfully box. Once this box comes up you'll need to click OK and then restart your Internet Explorer and again enter citrix.dvwf.com in the address section. At this point, you're ready to log in.

<u>**Supplier Product Management**</u>

Access: PO – Buying and PO Processing

Description: The Supplier Product Management screen allows staff to define which products will be jointly managed with a vendor. This screen is the basis for all of the electronic file functionality and vendor price negotiations defined later in this document.

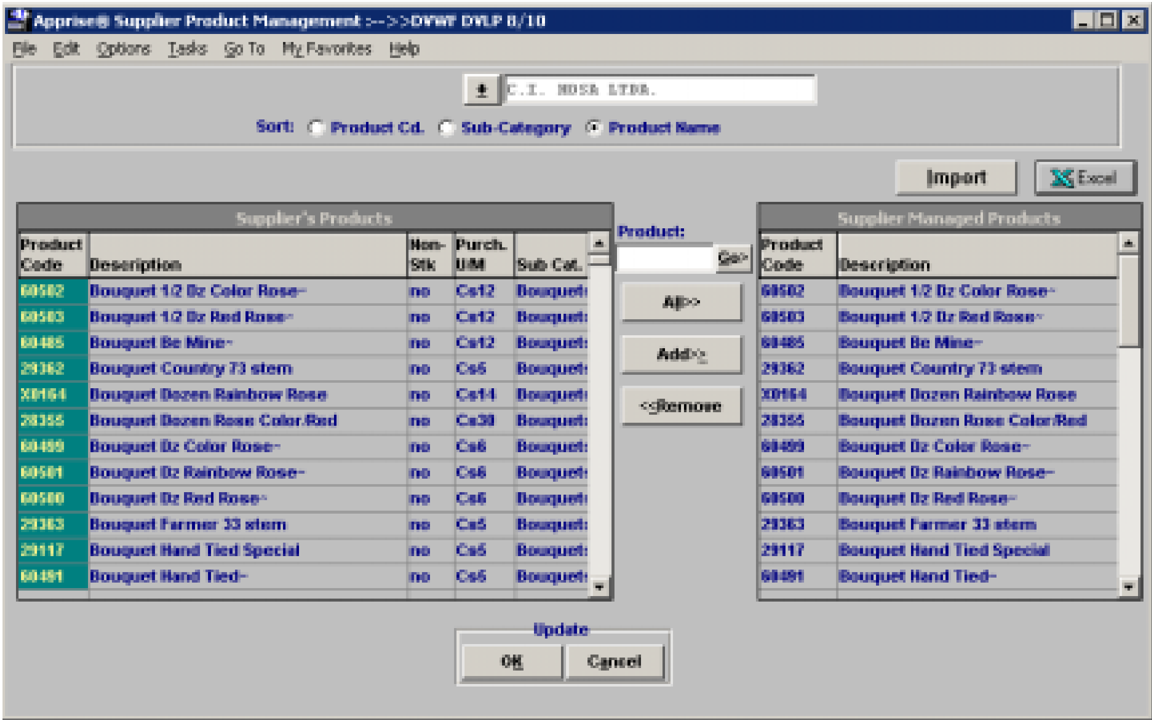


Viewing Products Managed by Supplier:

1. Enter the supplier's code or select the supplier using the drop down arrow at the top of the screen.
2. The products that are managed jointly between the DV buyer and the vendor will display in the list to the right titled "Supplier Managed Products".
3. The products listed in the table titled "Supplier's Products" are all products defined for the supplier displayed at the top of the screen when a buyer views this screen. When a vendor accesses this screen, it shows only those products where non-stocked = no.

Adding/Removing Products from Supplier Product Management List:

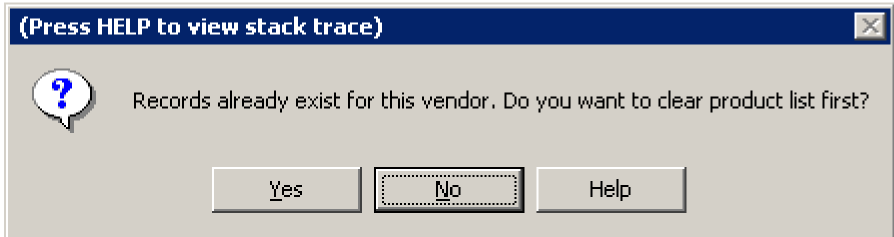
1. Select the supplier requiring the update.
2. Choose the Update button located at the lower right side of the screen.



3. Those products where this supplier is the PRIMARY vendor will appear in green.
4. Three buttons, All, Add and Remove will appear between the 2 lists.
5. To add products to the Supplier Managed Products list, highlight the product on the Supplier's Products list and either select the Add button or double-click on the product.
6. The Windows standard of (Shift-click) to select a range of products and (Ctrl-click) to select multiple products will also work to select products in either list
7. The All button will add all products on the Supplier's Products list to the Supplier Managed Products list.
8. To delete a product from the Managed Products list, highlight the product and select the Remove button or double-click the product on the Supplier Managed Products list.
9. Select the OK button to save all changes.

Import/Export Options

1. These options will allow you to import and / or export product lists, using comma-separated (.csv) files. When 'Import' is chosen, the user will receive the standard Windows browser, prompting for the location of the import file. The program is expecting a .csv file containing Apprise product code and description. Once the appropriate file has been selected, the following screen appears if products have already been setup for the vendor:

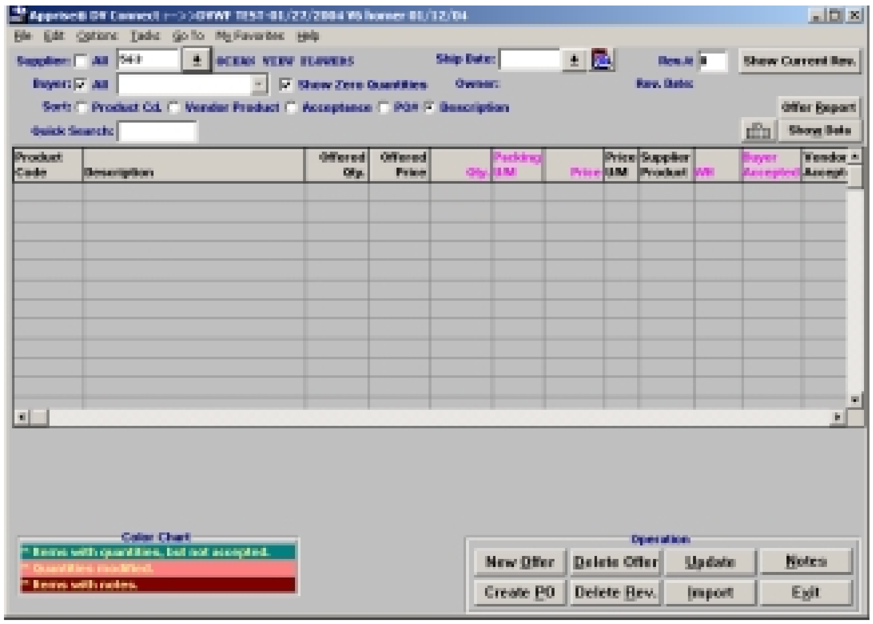


2. Choose <u>YES</u> to delete the current list, and import from the new file; choose <u>NO</u> to leave the current list, and only those records where the codes to NOT exist in the current list will be imported from the file.
3. ‘Export’ will allow the user to create an output file (.csv), containing Apprise product code and description. Once ‘Export’ has been selected, the user will be prompted for the name / location of the output file, with the standard Windows interface.

DV Connect Screen

Access: PO – Buying and PO Processing

Description: The Vendor Product Offerings screen allows suppliers to enter quantities and prices for a given week and allows for back and forth negotiations between buyers and vendors. Once an offer is accepted, the buyer can create a PO from the accepted entries.



Viewing Offers:

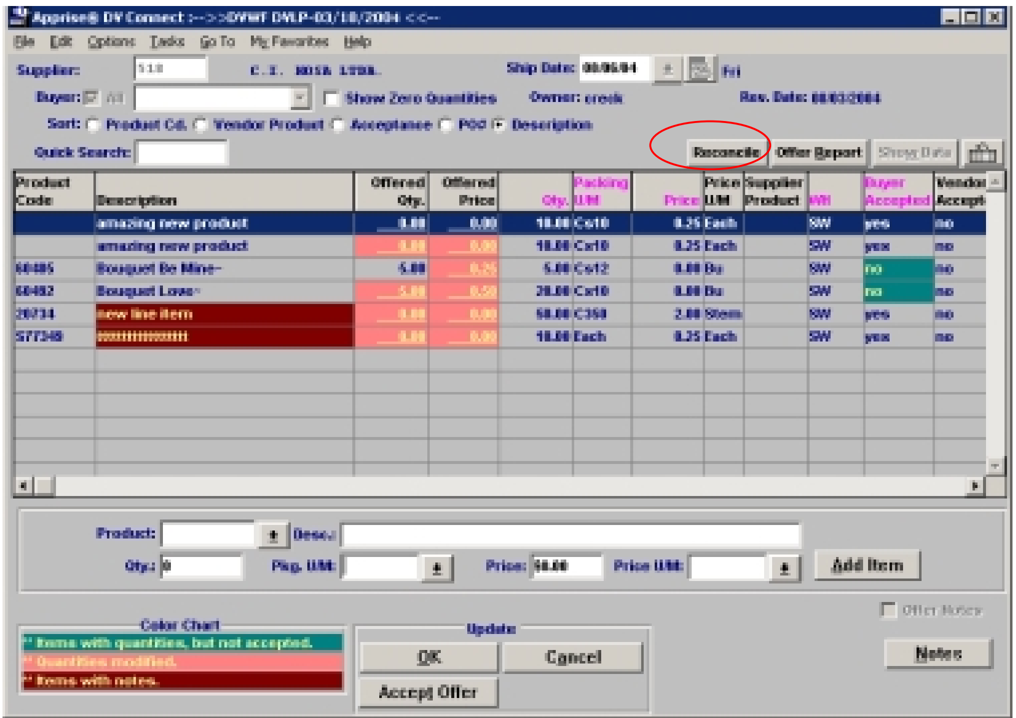
1. Enter supplier code or select the supplier using the down arrow. If the supplier is accessing this screen, the only suppliers they will be able to access are the ones their Apprise user ID is tied to. If they are only tied to 1 supplier, the supplier code will be brought up automatically on entry into this screen, and the supplier drop down selection will be hidden.
2. Enter the vendor shipping date in the Ship Date field.
3. If only interested in viewing products related to a particular buyer, select the buyer this offer is tied to in the drop down box. Otherwise check the All box. The system will bring up the most recent revision #. To look at older revisions, change the Rev.# and select the Show Data button. The Show Current Rev. button will bring up the most recent revision of an offer after viewing older versions.
4. A listing of products, their quantities, offered/negotiated prices, unit of measure, and acceptance information will display when Show Data is selected. The Offered Qty. and Offered Price columns represent the most recent offer or modification made by the vendor. The Qty. and Price columns reflect the values acceptable to the buyer. Any differences between these will be underlined and displayed in a salmon color.

Creating an Offer:

1. Enter supplier code or select the supplier using the down arrow. Supplier will be pre-selected when the vendor is entering this screen.
2. Enter the vendor's shipping date. The calendar button located next to the Ship Date field can be used to select a particular date.
3. If the offer needs to be filtered by buyer, select the buyer in the drop down box.
4. Select the New Offer button. The screen will appear similar to the screen below. If the vendor has had products defined in the Supplier Product Management screen above, the defined products will appear on the list.

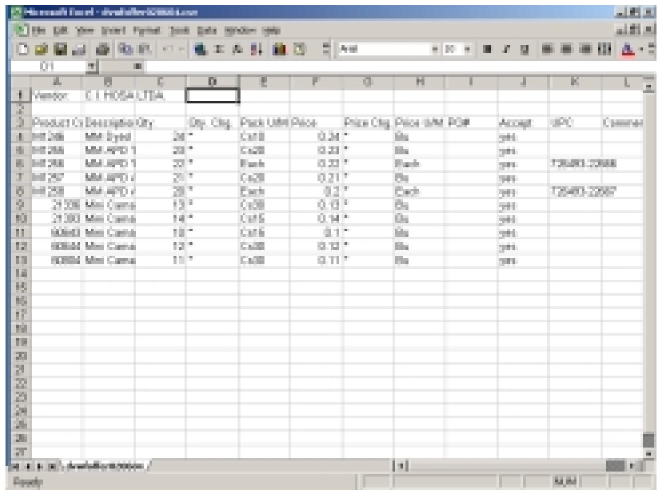
5. The products that are 1st listed are those setup in the Supplier Product Management screen. Any other products associated with the vendor can be added to the offer.
6. At this point, the Qty., Price, Packing U/M, Warehouse and Accepted columns can be modified by simply clicking in the cell and making the necessary changes. If the person accessing this screen is a vendor, they will update the Offered Qty., Offered Price, and Vendor Accepted columns. Only DV employees can view and modify the warehouse columns.
7. A warning message will appear to buyers if they change a price to one greater than that offered by the vendor; they can continue or return to the price field to make necessary changes.

8. Use the Quick Search field located above the browser to scroll quickly to a particular product name. For instance, in the listing above, entering "Cornflower" will quickly scroll to the first product that begins with cornflower.
9. There may be times when a product needs to be listed multiple times with different warehouses, or times when an offered product does not appear on the list. In these situations, the product, quantity, etc. can be entered below the product listing and then the Add Item button can be selected to save the new line to the list. If the product has not yet been setup in Apprise, the product code can be left blank as long as a product description is entered. This product will need to be reconciled using the Reconcile button at the top of the screen before a PO will include it.



10. Each product line can be accepted one at a time, or if all products that have quantities and prices are acceptable, the Accept Offer button will accept each of line at the last qty/price offered from the other party. The system only "accepts" the lines that have quantities entered.
11. If the person accessing this screen is a buyer, the Accept Offer button will change all values in the Qty. and Price columns to be the same as the Offered Qty. and Offered Price columns, only on those products where they are the assigned buyer. If the vendor is accessing this screen, the Accept Offer will change all values in the Offered Qty. and Offered Price columns to be the same as the Qty. and Price columns.
12. Whenever a user changes the qty and/or price column, their 'Accepted' flag will automatically switch to 'yes', and the other party's 'Accepted' flag will flip to 'No' (if either field is DIFFERENT).

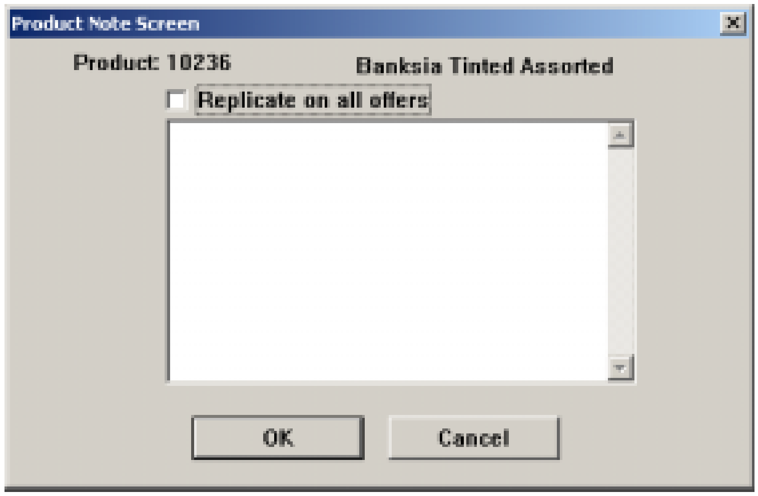
13. A warning message will appear to both buyers and vendors if they accept a line with a price of 0.00; they can accept the line as-is or return to the price field to update.
14. Once finished with the updates, a buyer should select the OK button to save the changes. You will notice that the Rev.# will increment by 1.
15. Once the offer is OK'd, the other party will be notified via e-mail of the offer. The email attachment has the following format:



16. When a NEW offer is sent, the price fields for the user receiving the offer will default to the values entered by the user creating the offer. <u>All quantity fields will default to zero.</u>
17. When in Update mode, in a new or existing offer, using the TAB or ENTER key will move you from column to column. The one exception to this is in the quantity column. The ENTER key will move the user DOWN the column, to make updating quantities easier.

Adding Product Notes:

1. Highlight the product on the offer listing and select the Notes button. A pop-up menu will appear with the selection of Product Note or Offer Note. Select Product Note. The note screen can also be brought up by a double-click on the product line.
2. The following Product Note screen will pop up for user to enter any applicable notes.



3. If the note entered should appear for this product/vendor on all offers from this point forward, select the **Replicate on all offers** check box.
4. Any product lines that have notes will have the product description colored with a background color of maroon.

Creating an Offer Note:

1. Select the Notes button. A pop-up menu will appear with the selection of Product Note or Offer Note. Select Offer Note.
2. A comment screen titled "Offer Note Screen" will be displayed.
3. Enter the appropriate comment and select the OK button to save the comment.

Deleting an Offer:

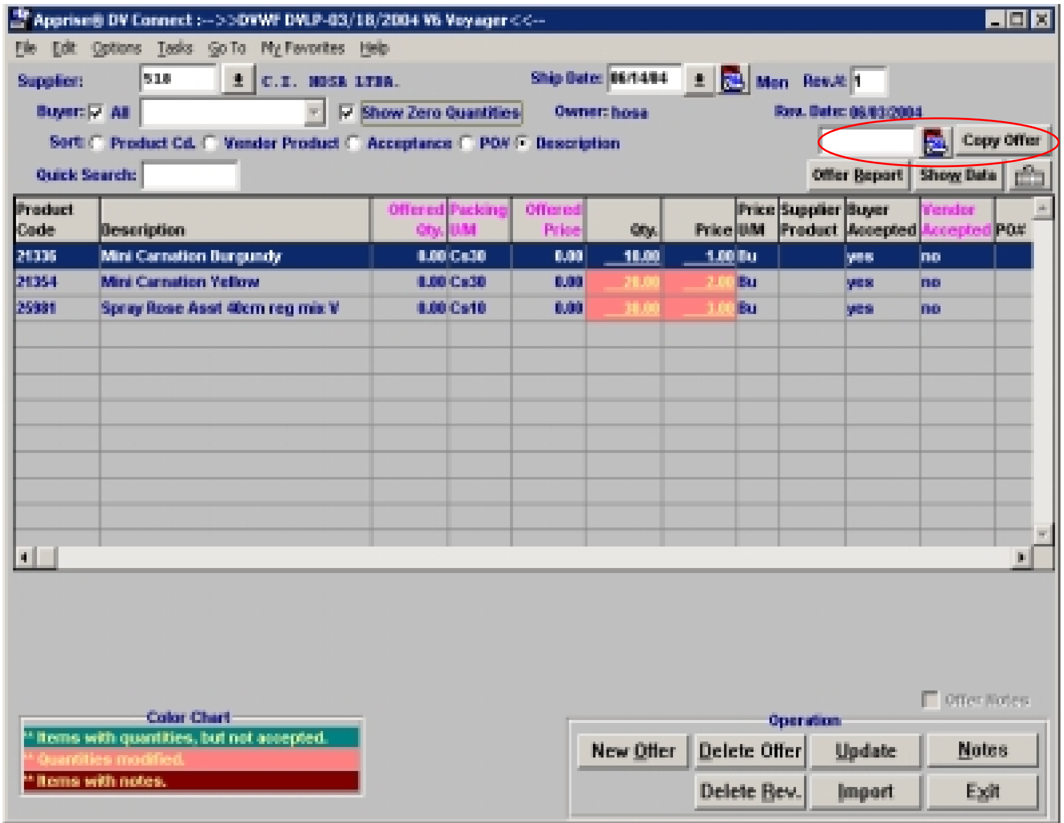
1. An entire offer can be deleted using the Delete Offer button. This will delete all revisions tied to the selected Ship Date. *Only the user who originally created the offer can delete it.*
2. First you will need to select the supplier and vendor shipping date to delete.
3. Next, select the Delete Offer button.
4. A message asking if you really want to continue with the deletion will pop up. Select Yes to continue deleting the displayed offer.
5. If any line of the offer has been placed on a PO, the offer cannot be deleted.

Deleting a Revision of an Offer:

1. Select the supplier, ship date and revision # to remove.
2. Next, select the Delete Rev. button located at the bottom of the screen. This will delete only the revision of the offer displayed. Only the most recent revision of an order can be deleted, and only if no lines of the revision have been placed on a PO.

Copying an Offer

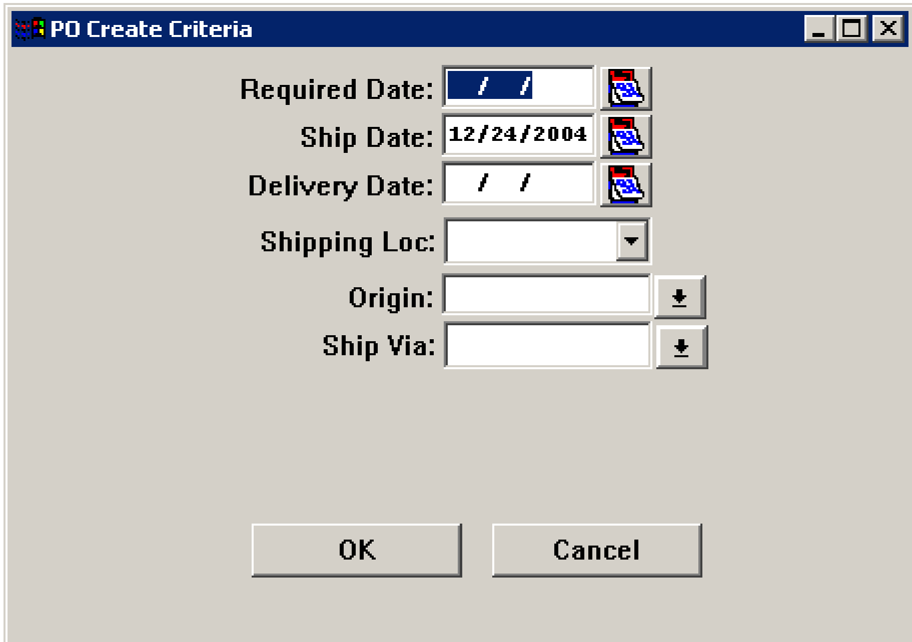
1. Vendors have the ability to copy an offer from one ship-date to another.
2. Only the first revision of an offer can be copied.
3. The vendor should select the ship-date of the offer they want to copy, and select revision #1. The offered products will appear, along with a Copy button and new ship date field.



4. The vendor should enter the NEW ship-date and click 'Copy Offer'. They will be prompted to verify that they want to copy the offer. The new ship date will be displayed in the original ship date field.

Creating a PO:

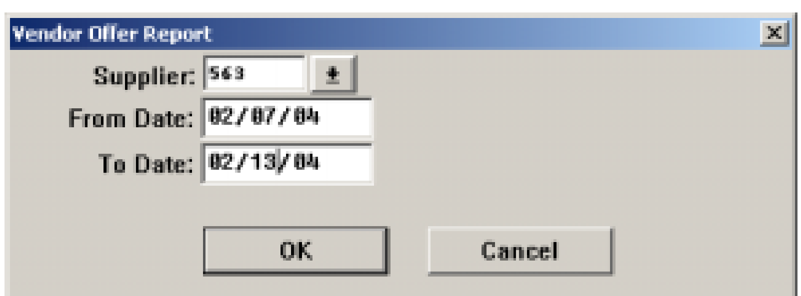
1. Select the supplier and offer to be used for the PO.
2. Choose the Create PO button.
3. A screen will pop up prompting user for the following fields: PO's required date, shipping date, scheduled delivery date, location, origin, and ship-via. The shipping date will default to the ship date entered on the offer.



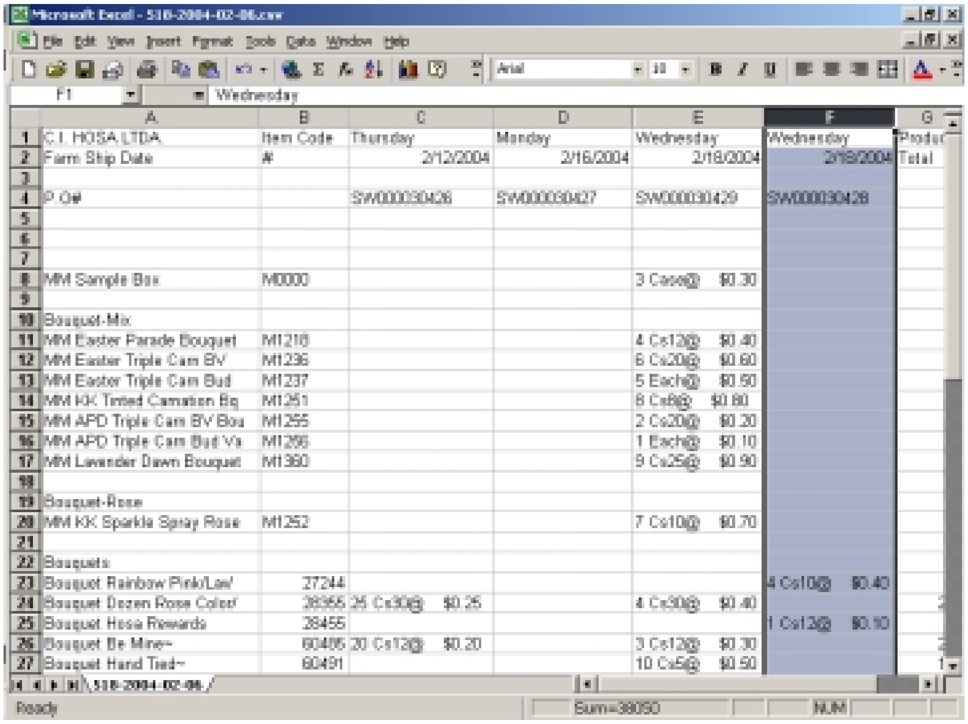
4. A PO will be created for the selected shipping location. **NOTE:** If there is more than one shipping location on the offer, the 'Create PO' step will have to be completed for each location.
5. Once the PO is generated, all changes must be made directly to the PO itself using the PO Maintenance screen.
6. **Only Buyers have access to this functionality.**

Offer Report:

1. To generate the vendor offer report, select the Offer Report button located in the upper right corner of the screen.
2. A dialog box will appear titled Vendor Offer Report.



3. Enter the vendor code and date range for this report and select the OK button.
4. The report will be brought up in Excel once complete.



Importing Product Offering:

1. Select the Import button to begin the import process. A screen will pop up to search for the file that is being imported. This file must be a comma separated file (.csv) in the following format:

   Warehouse
   Supplier product code
   Product description
   Quantity
   Price
   DV product code
   Vendor Shipping Date
   Buyer
   Price U/M
   Purchasing U/M
   Product Note

   Items **bolded** reflect required fields.

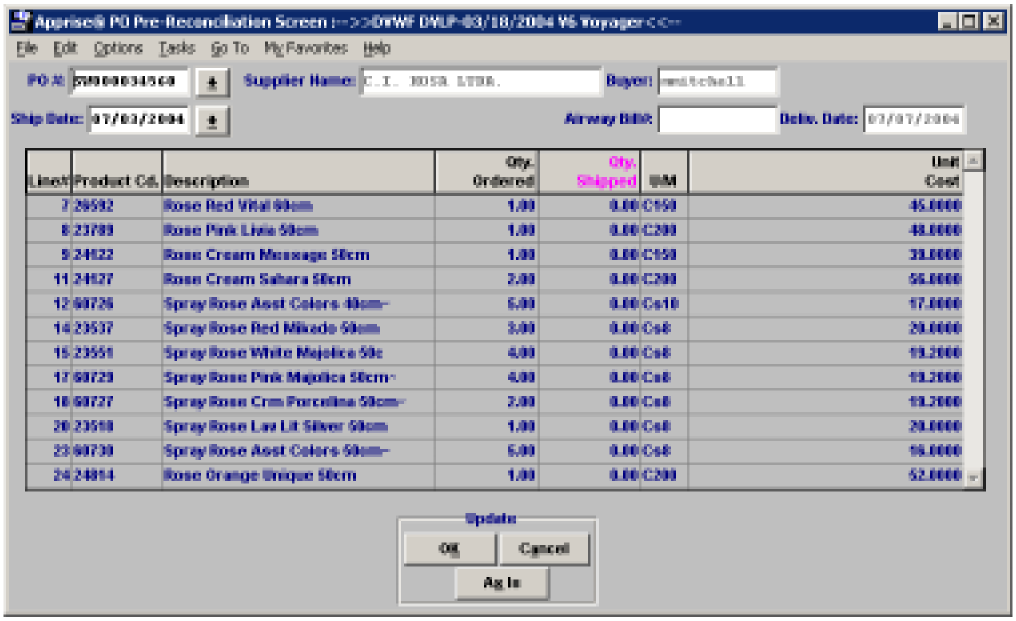
PO Pre-Reconciliation Screen

Access: PO – Buying and PO Processing – PO Pre-Reconciliation Screen

Description: The PO Pre-Reconciliation screen allows the vendor to update the quantities that they actually ship. This quantity will update the PO quantity ordered when saved.

Updating Shipped Quantities:

When the vendor enters this screen, they have the ability to bring up any of their POs and enter the quantities shipped. The vendor can select a PO by PO# or by ship-date. After choosing a purchase order, select the Update button. This will allow the Qty. Shipped column to be updated.



1. Each PO line can be updated individually, or, if the quantity shipped is the same as the quantity ordered, the As Is button will automatically fill in the same amounts. Once the shipped quantities have been entered, select the OK button to save the changes.
2. The airway bill# can be entered as well in the upper right side of this screen.
3. When a shipped quantity is different from the quantity ordered, the buyer is notified of the lines that are different. The PO quantities will be changed once the vendor saves their changes. The following e-mail is sent to the buyer when this occurs.

   PO: SW000024151
   Supplier: 444 FLORIGENE LIMITED
   Sched Deliv: 10/18/03

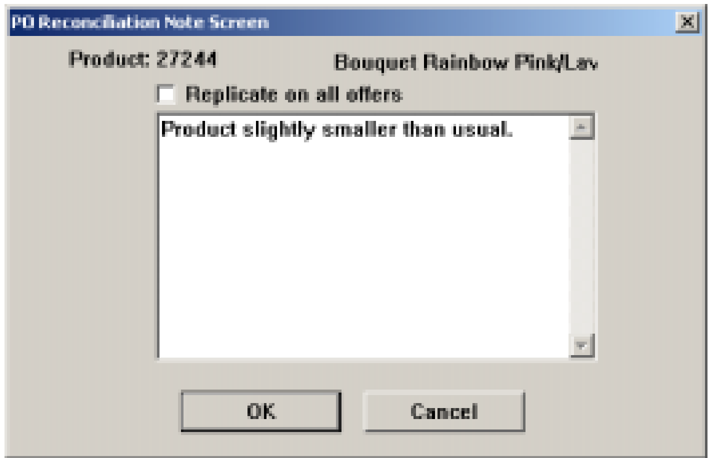
   Products:
   1 60519: Carnation Moon Series Sel p70~ Ord: 2 Shipped: 4
   2 60525: Moon Series Variety Pk 1/8bx~ Ord: 3 Shipped: 1
   3 21365: Mini Carnation Moon Shadow Ord: 2 Shipped: 2

   Date Changed: 10/17/03 2:41 PM
   Changed By: sfaucett

4. If the shipped quantity is less than the total quantity soft allocated against it, the system will first try to find an open PO that will be received in time to soft allocate against. If none exist, the system will check to see if there is any inventory available and, if so, will hard allocate the line. If neither of these conditions exists, the system will just flag the soft allocated records as problems and send e-mail to the sales agent.

Entering Reconciliation Notes:

1. Highlight the product requiring a note and select the Notes button at the bottom of the screen. Or, double-click on the product line. The PO Reconciliation Note Screen will appear.



2. Enter the appropriate note and select OK.
3. The Replicate on all offers will create a master note that will automatically be connected to any future offer for this product.

Importing Shipped Quantities from a File:

1. Only the buyer has access to this functionality. Select the Import button to begin the import process. A screen will pop up to search for the file that is being imported. This file must be a comma separated file (.csv) in the following format:

   PO#, PO Line#, DV product code, Quantity Shipped, U/M on PO line

2. Any differences between the PO and shipped quantities will automatically be reconciled.