Synergy
Axis Supplier Portal – Process Guide V3.0

Axis Supplier Web Portal v3.7

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Legal Disclaimer

The product described in this documentation may be connected to, and/or communicate information and data via, a network interface, which should be connected to a secure network. It is your sole responsibility to ensure a secure connection to the network and to establish and maintain appropriate measures (such as but not limited to the installation of firewalls, application of authentication measures, encryption of data, installation of antivirus programs, etc.) to protect the product, the network, your systems, and the interface against any kind of security breach, unauthorised access, interference, intrusion, leakage, damage, or corruption or theft of data. We are not liable for damages or losses related to any such security breach, unauthorised access, interference, intrusion, leakage, damage, or corruption or theft of data.

Contents

Introduction

Synergy has implemented electronic business capability to assist the automation of document delivery and document receipt with our suppliers. As part of this initiative a number of business documents can be delivered and received electronically.
This document provides a process overview for suppliers for the following documents exchanged via the Axis Supplier Portal delivery:

- Purchase Order (PO)
- Purchase Order Acknowledgment (POA)
- Purchase Order Changes (POC)
- Request for Quotes (RFQ)
- Quotations (Quote)
- Invoice (INV)
- Remittance Advice (RA)

Axis Supplier Portal is a browser-based application that enables your organisation to:

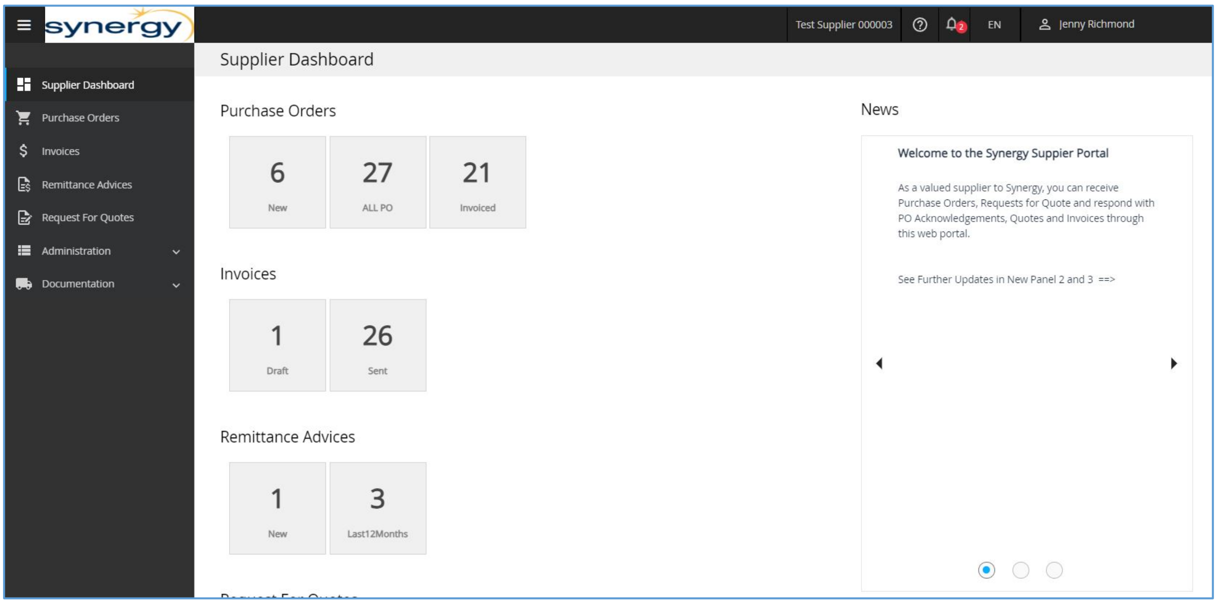
- View and respond to documents received from Synergy
- Create new documents for transmission to Synergy
- Manage documents through the use of filters
- Search for documents
- Manage users and user permissions

Axis Supplier Portal is externally hosted by Hitachi Energy. The application is a secure environment for Synergy and suppliers. Suppliers are authenticated by a log on and password.

Supplier Portal - Supplier

The Axis Supplier Portal allows suppliers to respond to requests from Synergy in a timely manner. As an example, you can respond to a purchase order by sending a purchase order acknowledgement, a shipping notice or an invoice.

When you have logged in, the supplier dashboard displays. This screen displays your key data relating to your available functions.



Acronyms

The following acronyms are used in Axis:

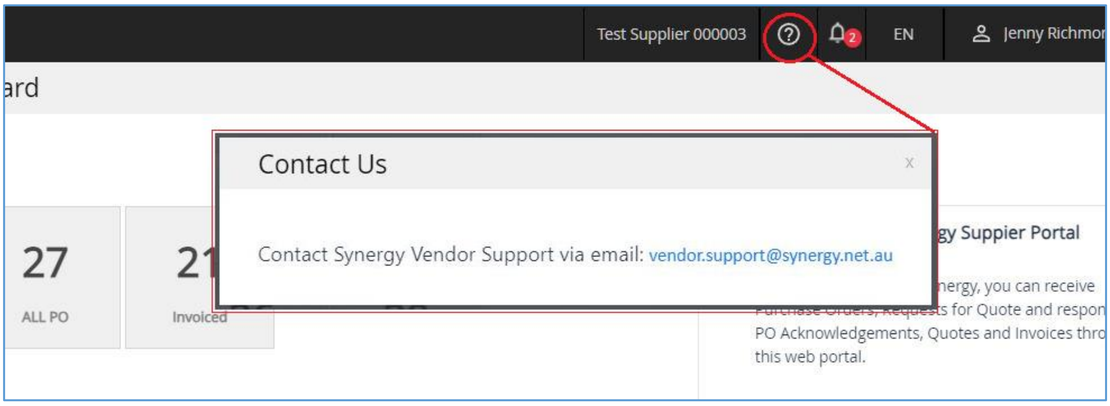
Acronym	Meaning
PO	Purchase Order
SSCC	Serial Shipping Container Code (SSCC-18 GS1 internal standard)
POA	Purchase Order Acknowledgement
POC	Purchase Order Change
RFQ	Request for Quote
RA	Remittance Advice
INV	Invoice
ASN	Advance Shipping Notice

Language

You can select your preferred language by clicking the **Language** icon on the top tool bar.

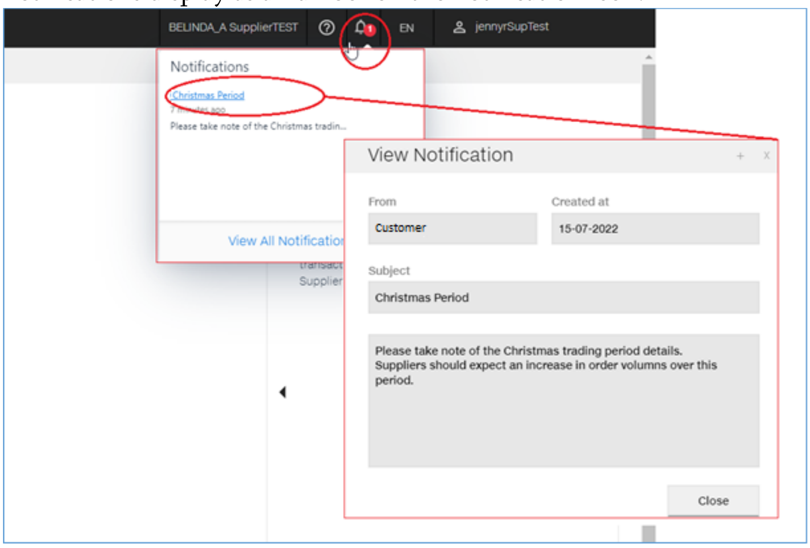
Contact Us

You can find all the necessary 'Contact Us' details to contact Synergy by clicking on the '?' icon on the top tool bar.



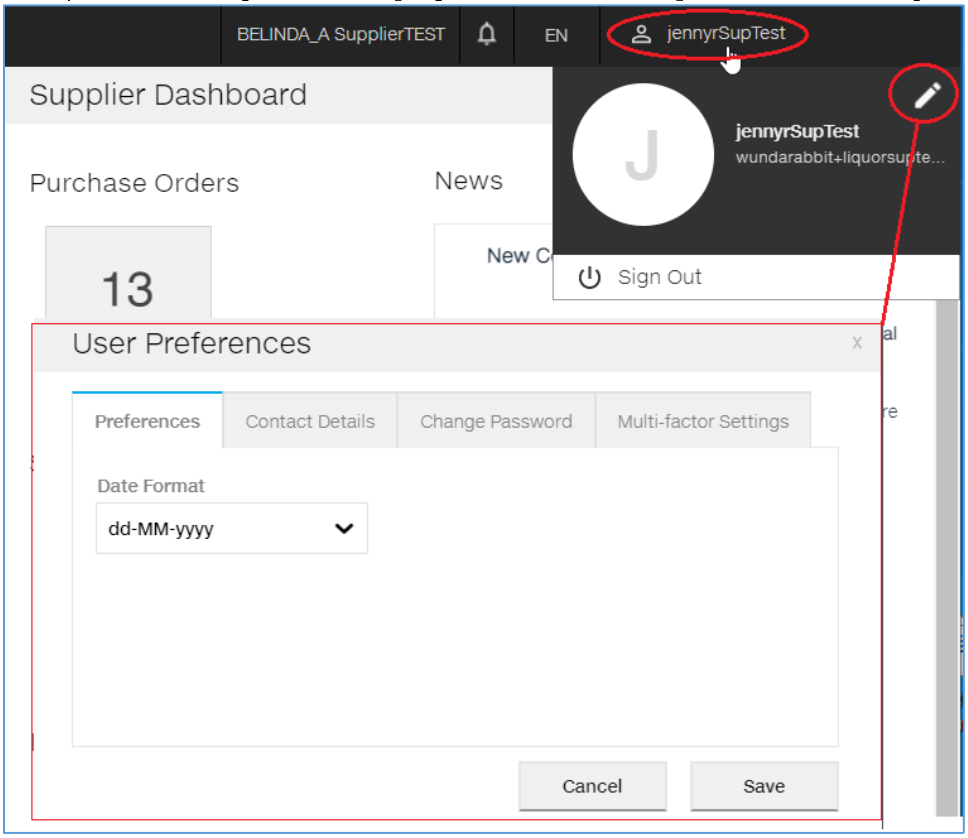
Notifications

You can review notifications from Synergy by clicking the **Notifications** icon on the top tool bar. Unread notifications display as a number on the notification icon.



User Settings

Click your user settings from the top right of the tool bar, to perform the following tasks:



- Logout of the **Axis Supplier Portal**
- Change your password

Note: Passwords must be at least 8 characters long and incorporate 1 upper case character, 1 lower case character and 1 numeric character.

- Maintain your user details and preferences
- User name
- Email address
- Date display preference
- Multi-factor Authentication settings.

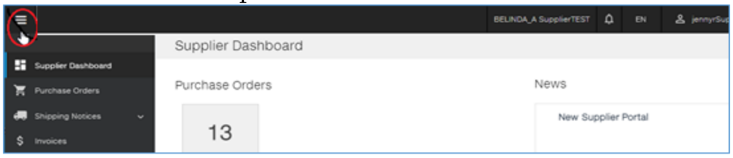
The Multi-factor authentication management for your user account will allow you to turn on multi-factor authentication if you so choose. If this is activated for your account, you will have a custom account key generated for you, that can be used to register with an Authenticator application such as, Google Authenticator, or Microsoft Authenticator, among many alternatives.

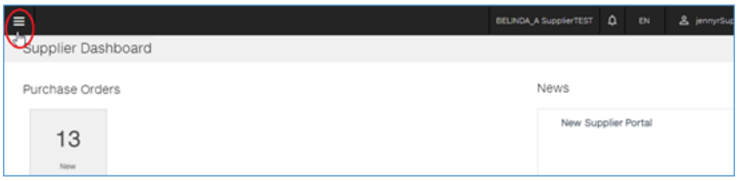
You would install your chosen authenticator on your mobile device.

When Multi-factor authentication is in use for your account, each time you login there will be an additional step after verifying your password.
You will be prompted for entry of digits that are generated for you by your chosen Authenticator application.
Once these are entered correctly, you will be logged in to your Supplier Portal account.

Hide/Show Main Menu

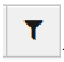
Click  on the top left of the tool bar, to hide/show the menu bar.

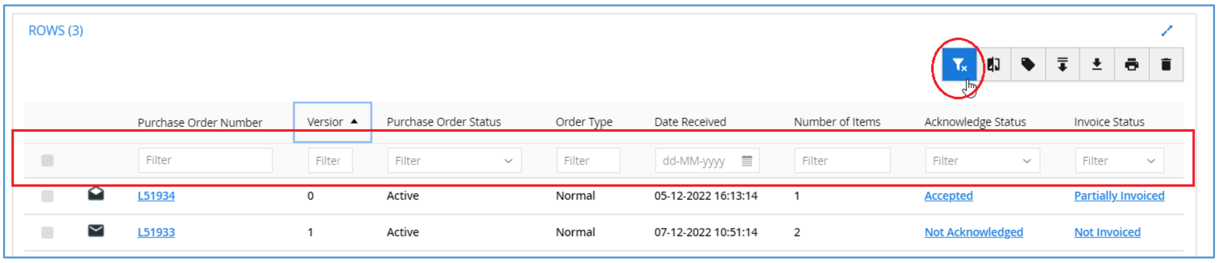




Maintaining Grids

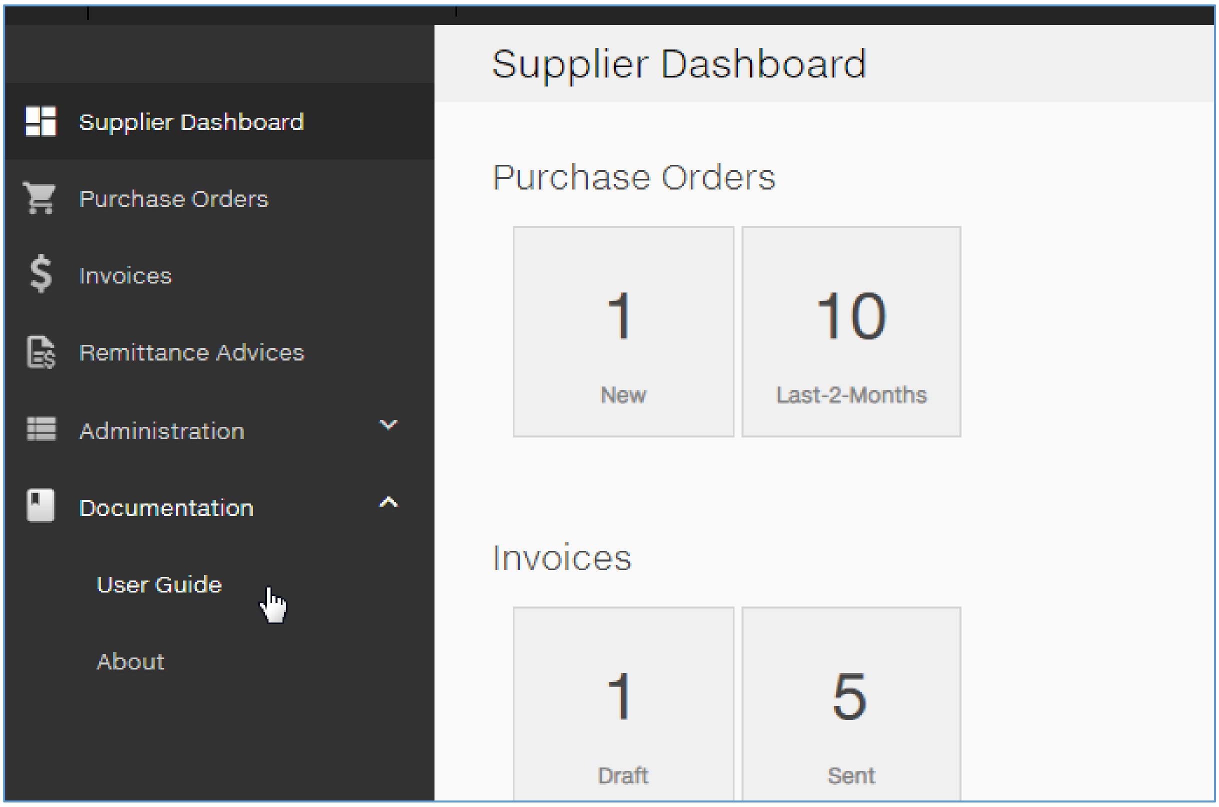
Unless specified otherwise, you can perform the following tasks on all Axis grids:

- Sort the information in the grid by ascending or descending order based on a particular column.
- Filter the information in the grid based on a particular column attribute. Click **Show or hide filter row**  to toggle the display of row filters.



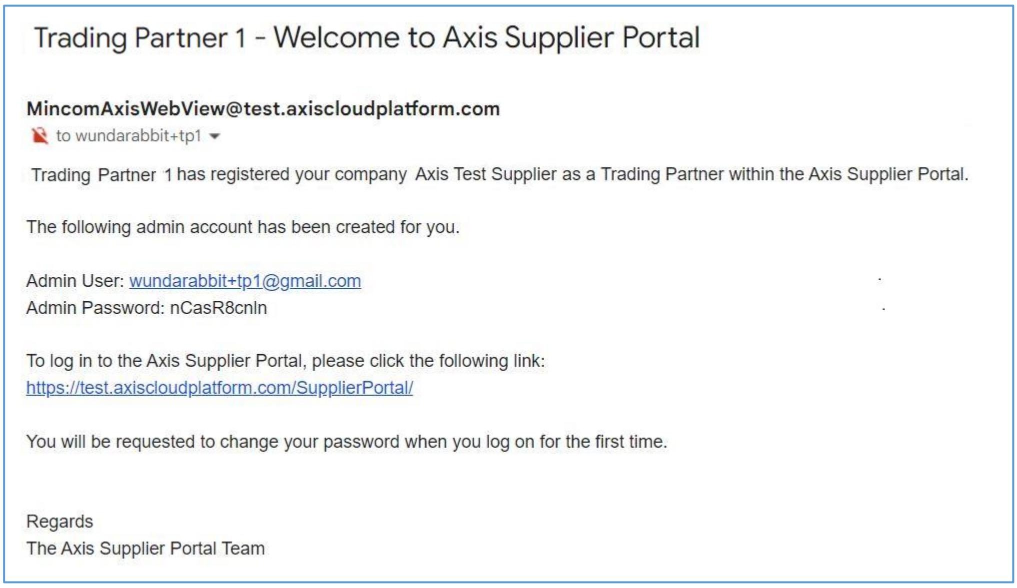
Help

You can access the **Supplier Portal** help by clicking the User guide menu option from the **Documentation** link on the main menu.



Administering the Supplier Portal

The nominated Admin user will receive an email notification indicating your company has been registered in the Supplier Portal. The email notification will indicate the temporary password, and the Admin user will be requested to change their password when they log on for the first time.


Trading Partner 1 - Welcome to Axis Supplier Portal

MincomAxisWebView@test.axiscloudplatform.com
to wundarabbit+tp1

Trading Partner 1 has registered your company Axis Test Supplier as a Trading Partner within the Axis Supplier Portal.

The following admin account has been created for you.

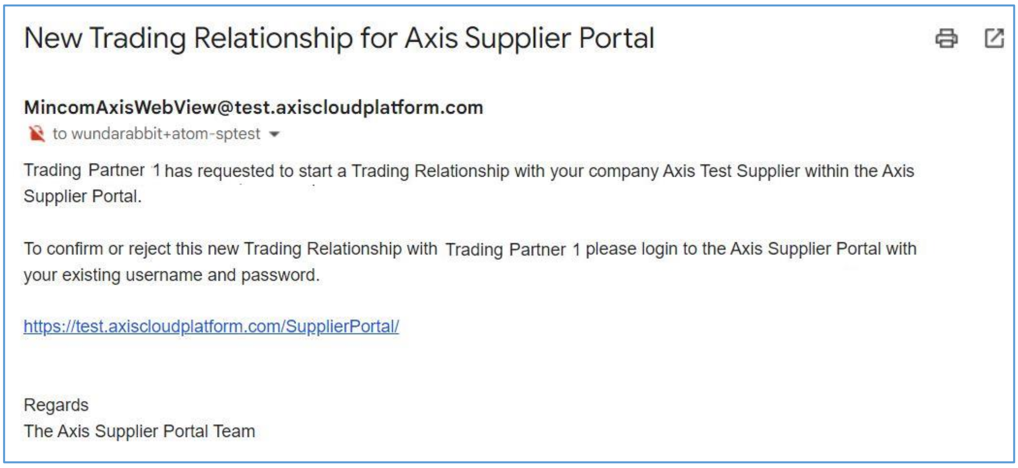
Admin User: wundarabbit+tp1@gmail.com
Admin Password: nCasR8cnIn

To log in to the Axis Supplier Portal, please click the following link:
https://test.axiscloudplatform.com/SupplierPortal/

You will be requested to change your password when you log on for the first time.

Regards
The Axis Supplier Portal Team

If you are a supplier that is already registered in the Supplier Portal, the existing Admin user will receive an email notification indicating your company is being requested to start another trading relationship.


New Trading Relationship for Axis Supplier Portal

MincomAxisWebView@test.axiscloudplatform.com
to wundarabbit+atom-sptest

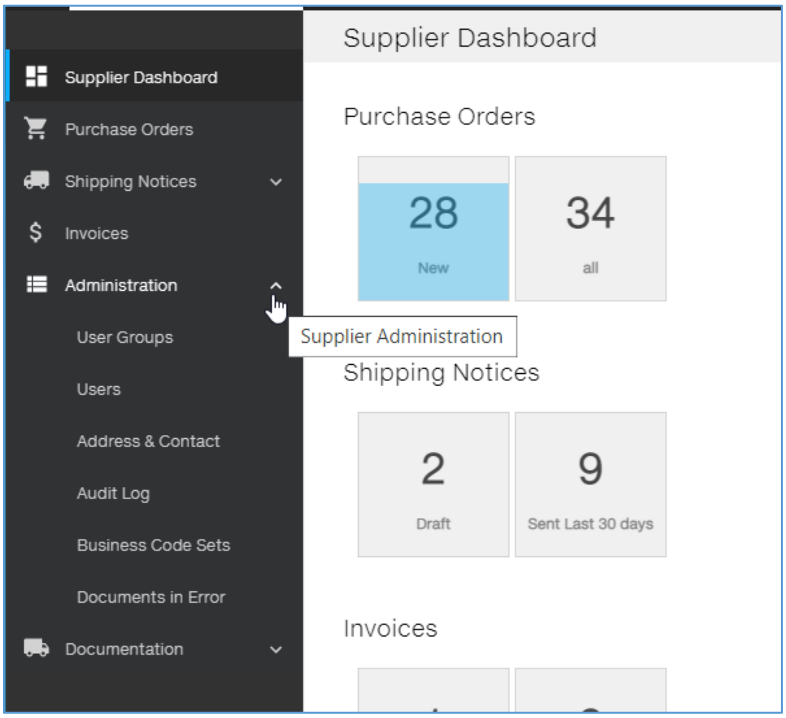
Trading Partner 1 has requested to start a Trading Relationship with your company Axis Test Supplier within the Axis Supplier Portal.

To confirm or reject this new Trading Relationship with Trading Partner 1 please login to the Axis Supplier Portal with your existing username and password.

https://test.axiscloudplatform.com/SupplierPortal/

Regards
The Axis Supplier Portal Team

Click on the **Administration** section in the main menu to set up and maintain the **Supplier Portal**.



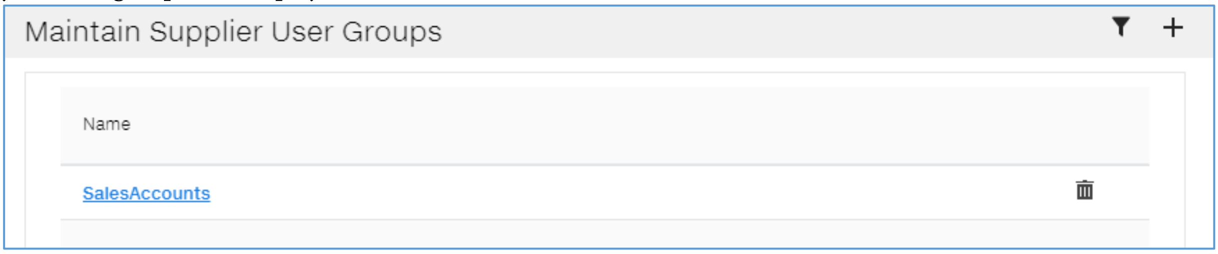
Initial Mandatory Configuration Steps

Below is a summary of the initial configuration that should be verified and/or setup by the nominated Admin user after initial login:

- Configure the Supplier's Tax rate for Invoicing 'Tax Code'. Refer to section <ins>**Working with Supplier Business Code Sets.**</ins>
- Verify the Supplier Notification Email addresses. Refer to section <ins>**Working with Supplier Addresses and Details.**</ins>

Working with Supplier User Groups

You can maintain your user groups by clicking **Administration » User Groups** on the main menu. User groups are a grouping mechanism for assigning permissions to users. When you open this screen, a list of all your user groups will display.



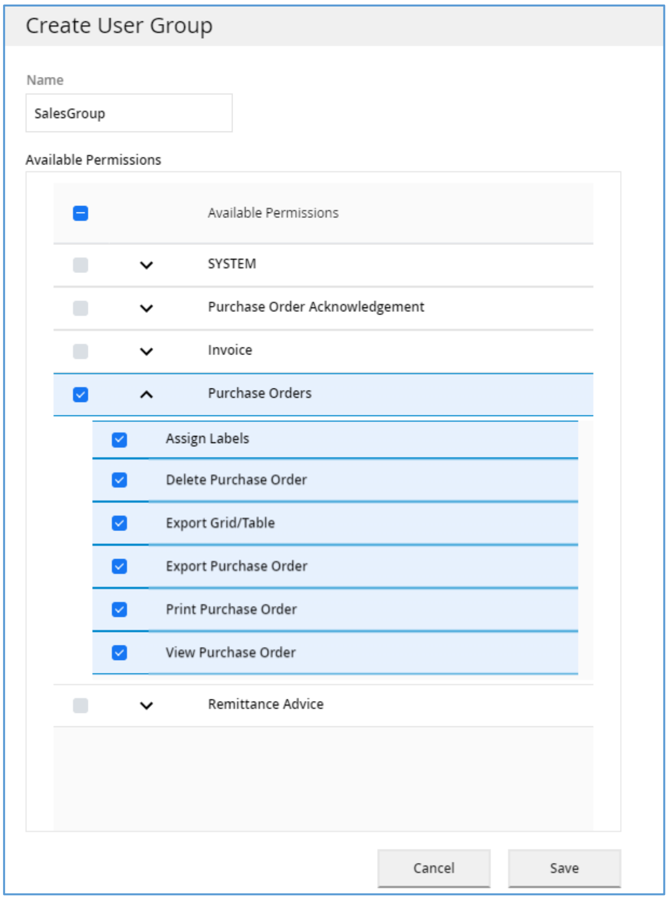
- You can create a new user group by clicking **+** in the top right corner of the screen. The **Create User Group** screen opens.
- You can modify a user group by clicking the user group. The **Modify User Group** screen opens.
- You can delete a user group by clicking the **Trash Can** icon for the user group.

Note: A user can be assigned to more than one user group. If a permission is enabled within any one of these user groups, the user will be able to perform the task.

Permissions

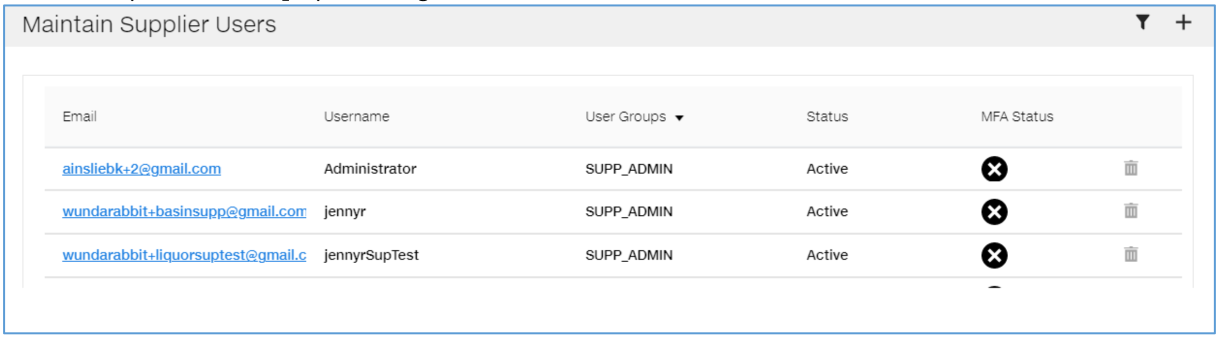
Permissions are grouped by system permissions and document specific permissions. Documents permissions are only available when the document is in use.

Note: Enabling a permission will enable all users assigned to the user group access to the function associated with the permission.



Working with Users

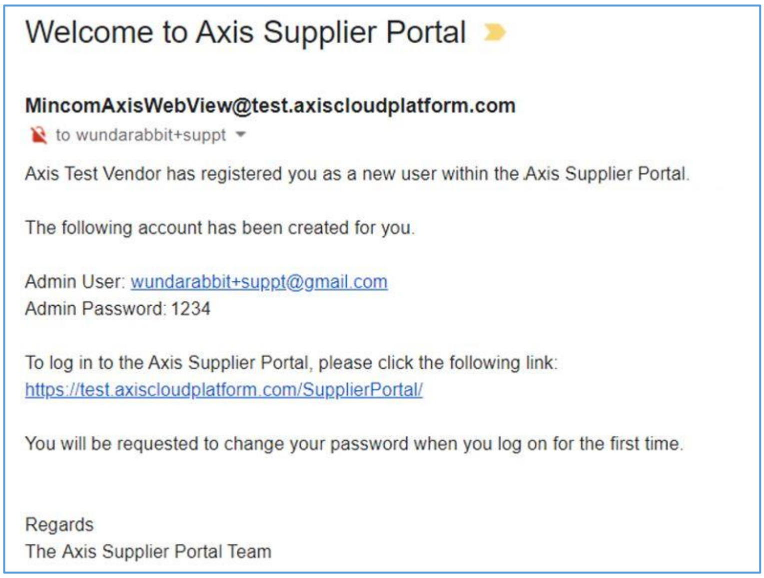
You can maintain individual users by clicking **Administration » Users** on the main menu. Users must belong to a user group. Users can belong to more than one user group.
A list of all your users displays in the grid.


Maintain Supplier Users

Email	Username	User Groups	Status	MFA Status	
ainsliebk+2@gmail.com	Administrator	SUPP_ADMIN	Active		
wundarabbit+basinsupp@gmail.com	jennyr	SUPP_ADMIN	Active		
wundarabbit+liquorsuptest@gmail.c	jennyrSupTest	SUPP_ADMIN	Active		

- You can create a new user by clicking + in the top right corner of the screen. The Create User screen opens.

The user will receive an email notification indicating an account has been created. The email notification will indicate the temporary password, and the user will be requested to change their password when they log on for the first time.


Welcome to Axis Supplier Portal

MincomAxisWebView@test.axiscloudplatform.com
to wundarabbit+suppt

Axis Test Vendor has registered you as a new user within the Axis Supplier Portal.

The following account has been created for you.

Admin User: wundarabbit+suppt@gmail.com
Admin Password: 1234

To log in to the Axis Supplier Portal, please click the following link:
https://test.axiscloudplatform.com/SupplierPortal/

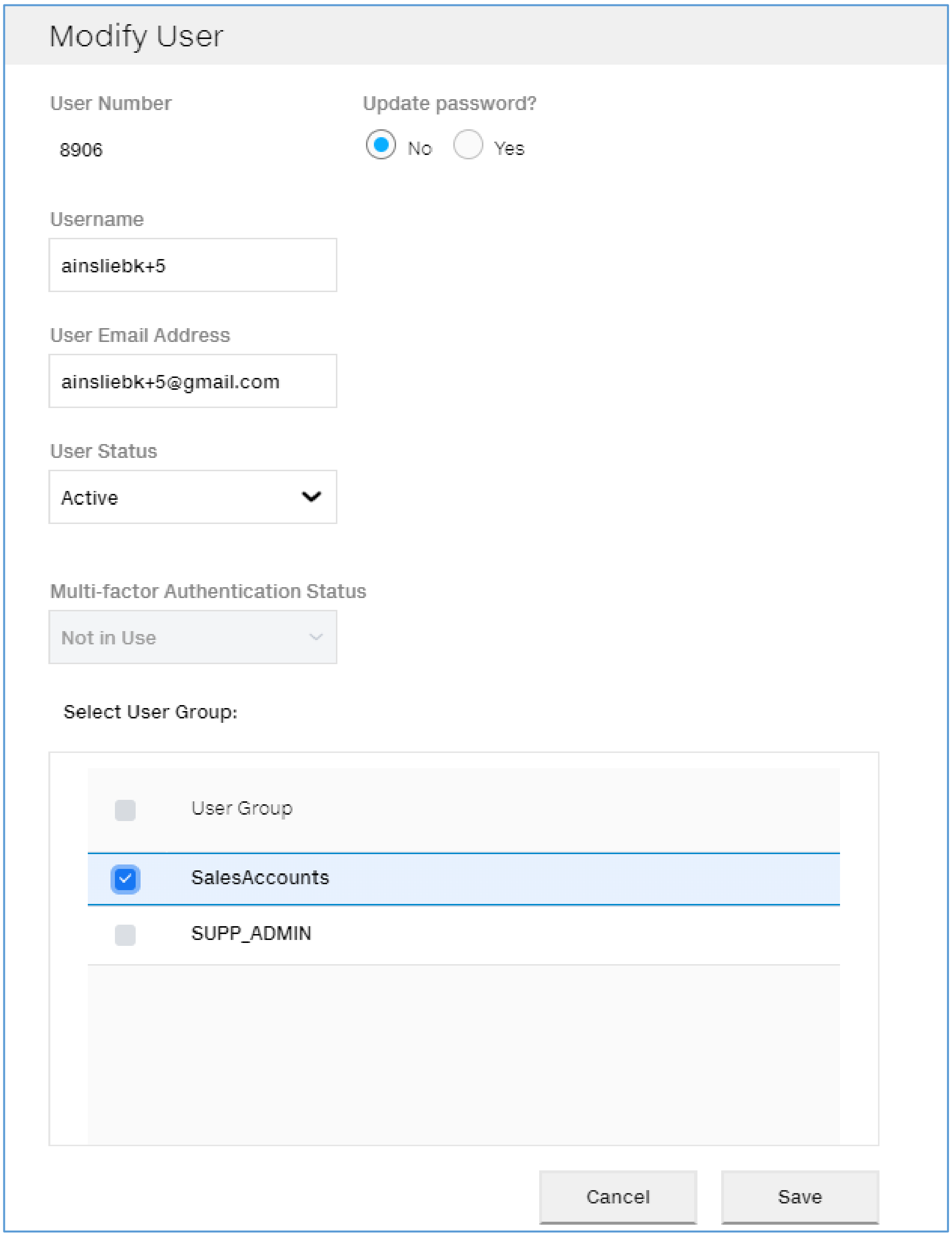
You will be requested to change your password when you log on for the first time.

Regards
The Axis Supplier Portal Team

- You can modify a user by clicking the user. The **Modify User** screen opens.
- You can assign a user to **User Groups**.
- You can change the status of the user.
- You can change the user's password and email address.
- You can view the Multi-factor authentication status for a user, and if an Administrator, you can reset their unique token, to allow a new registration with an Authenticator application.

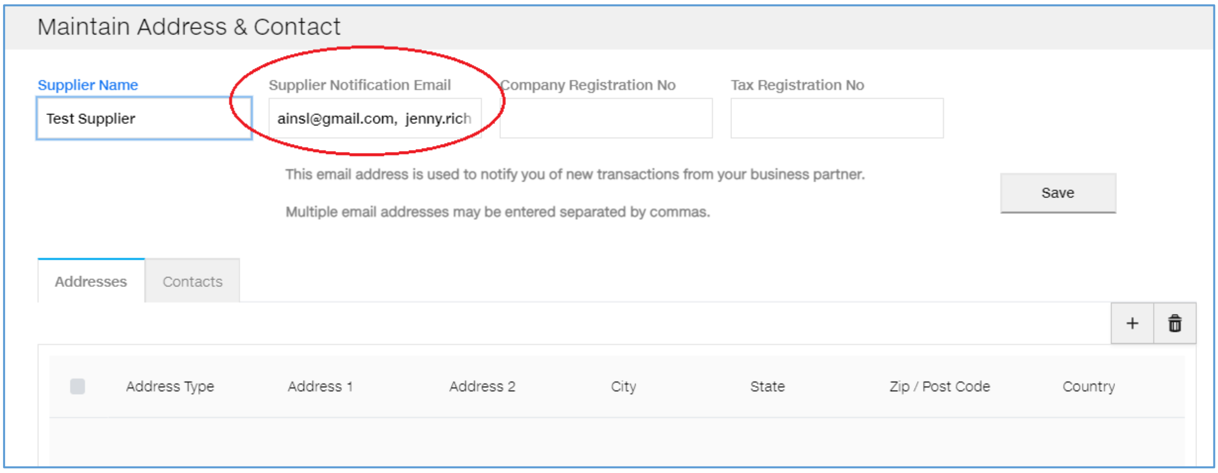
Note: An email address must be unique within the system. Changing an email address will also change the login credentials. An email address must be at least 8 characters long and incorporate at least 1 upper case character, 1 lower case character and 1 numeric character.

- You can delete a user by clicking the **Trash Can** icon.
- You cannot delete or change the user group for the Supplier Administrator.



Working with Supplier Addresses and Details

You can maintain address and contact information by clicking **Administration » Address & Contact** on the main menu.



The **Supplier Notification Email** field is the email addresses to receive Supplier Portal email notifications. You can enter more than one email address; separate the email addresses with a comma when you enter multiple addresses. It is recommended that suppliers create a group address and have multiple users linked to the address to build a backup into the process should the primary supplier contact be away on leave.

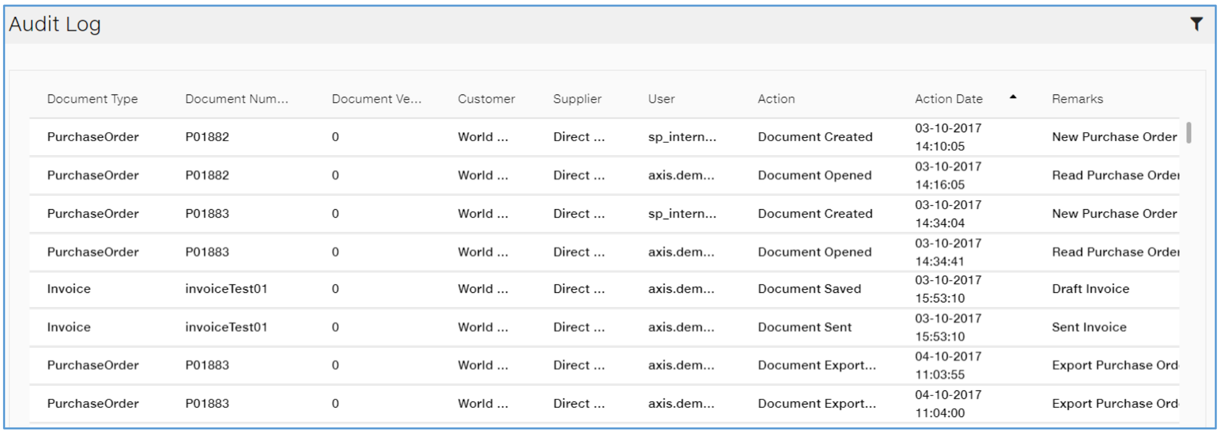
Note: The **Default Address** can be modified but cannot be deleted. Email addresses for a contact entered in this screen are not used as login credentials, and do not have to be unique to the system.

- You can create a new address or contact by clicking **+** in the top right corner of the address or contact tabs. The **Add New Address** or **Add New Contact** screen opens.
- You can modify an address or contact by clicking the address or contact from the list. The **Update Address** or **Update Contact** screen opens.
- You can delete an address or contact by selecting the address or contact and clicking the **Trash Can** icon.

Reviewing Audit Logs

You can review actions that have occurred to a document by clicking **Administration » Audit Log** on the main menu. You can use the filter option on the grid to filter the information based on a particular attribute. Actions recorded in the Audit Log:

- Opening an inbound document for the first time
- Printing a document
- Exporting a document
- Deleting a document
- Saving an outbound document
- Sending an outbound document

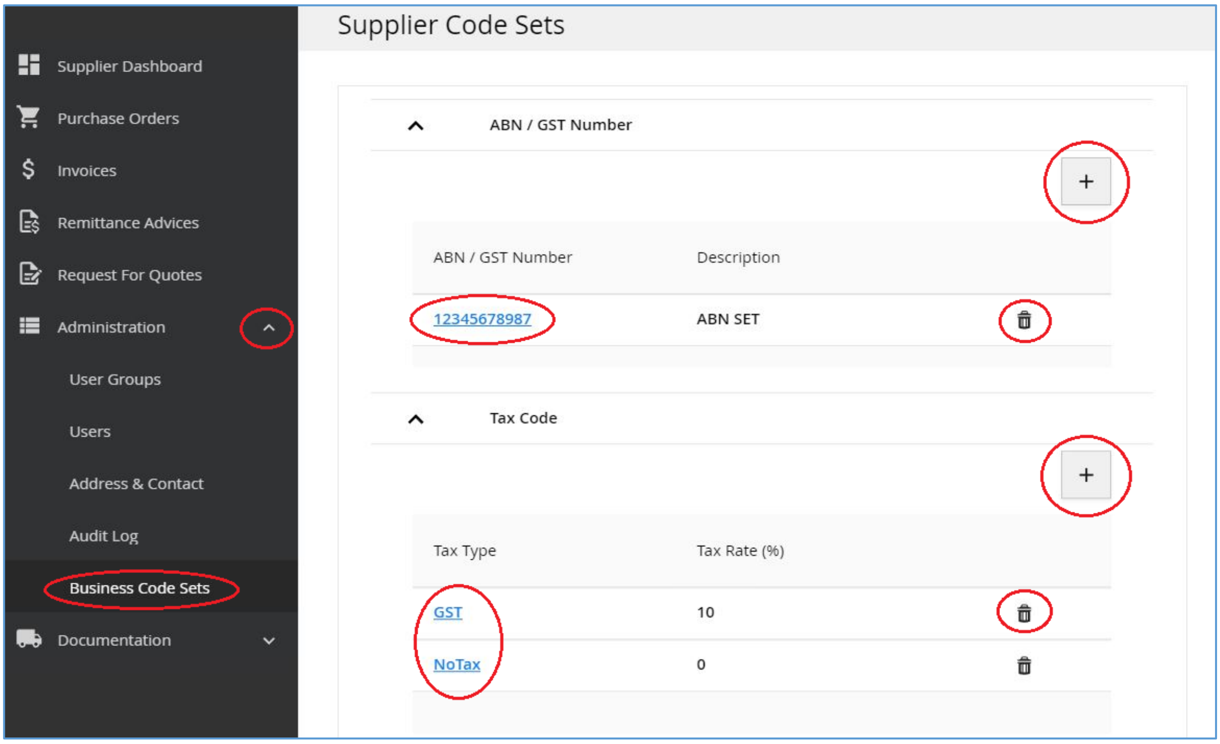


Audit Log

Document Type	Document Num...	Document Ve...	Customer	Supplier	User	Action	Action Date	Remarks
PurchaseOrder	P01882	0	World ...	Direct ...	sp_intern...	Document Created	03-10-2017 14:10:05	New Purchase Order
PurchaseOrder	P01882	0	World ...	Direct ...	axis.dem...	Document Opened	03-10-2017 14:16:05	Read Purchase Order
PurchaseOrder	P01883	0	World ...	Direct ...	sp_intern...	Document Created	03-10-2017 14:34:04	New Purchase Order
PurchaseOrder	P01883	0	World ...	Direct ...	axis.dem...	Document Opened	03-10-2017 14:34:41	Read Purchase Order
Invoice	invoiceTest01	0	World ...	Direct ...	axis.dem...	Document Saved	03-10-2017 15:53:10	Draft Invoice
Invoice	invoiceTest01	0	World ...	Direct ...	axis.dem...	Document Sent	03-10-2017 15:53:10	Sent Invoice
PurchaseOrder	P01883	0	World ...	Direct ...	axis.dem...	Document Export...	04-10-2017 11:03:55	Export Purchase Ord
PurchaseOrder	P01883	0	World ...	Direct ...	axis.dem...	Document Export...	04-10-2017 11:04:00	Export Purchase Ord

Working with Supplier Business Code Sets

You can review and maintain the supplier defined business codes by clicking **Administration » Business Code Sets** on the main menu.



- You can add a new row by clicking + in the top right corner of each code set.
- You can modify a row by double clicking on the row to be modified.
- You can delete a row by selecting the row and clicking the **Trash Can** icon.

Note: Business Code sets are specific to Synergy's business processes.

Synergy make use of Business Code sets to configure the Supplier's Tax Rate for Invoicing 'Tax Code' (enter the Tax Type and Tax Rate); this data is returned on the invoice. **This is mandatory.**

Synergy make use of Business Code sets to configure the Supplier's ABN for Invoicing; this data is returned on the invoice. **This is mandatory.**

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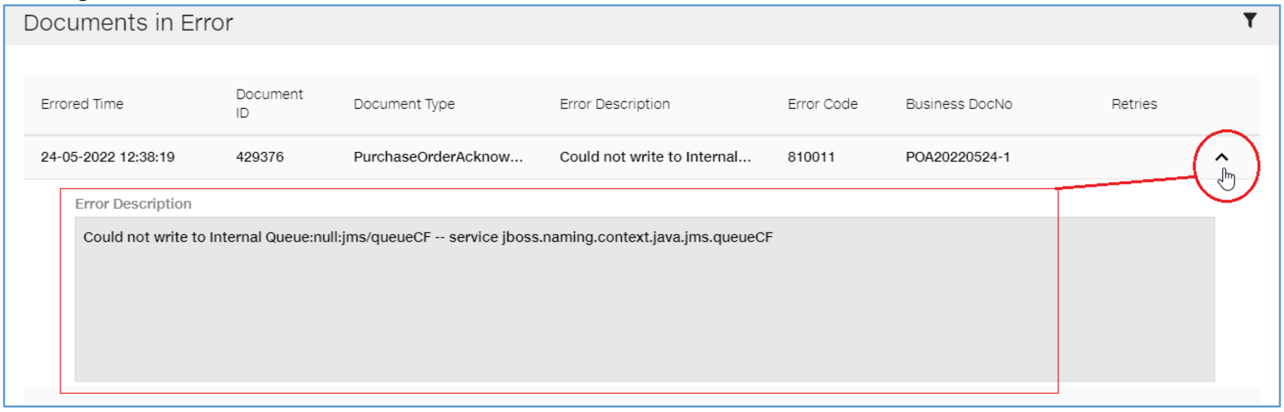
Reviewing Supplier Documents in Error

You can review all of the documents sent to Synergy which they have not yet received due to an error by clicking **Administration » Documents in Error** on the main menu.



Logging in to the Supplier Portal

You log in to the Axis Supplier Portal using your email address. If you are a supplier associated with multiple customers, a list of your customers will display when you log in (depending on your user permissions). You must select a customer before proceeding.

A password is required to log in to the Supplier Portal. You can reset your password in the following ways:

- By contacting your Administration User
- In the user preferences

Note: If you have forgotten your password, use the **Forgotten Password** on the login page, an email with a verification code will be sent to the email address used as the login. You will be asked to reset your password on successful entry of the verification code.

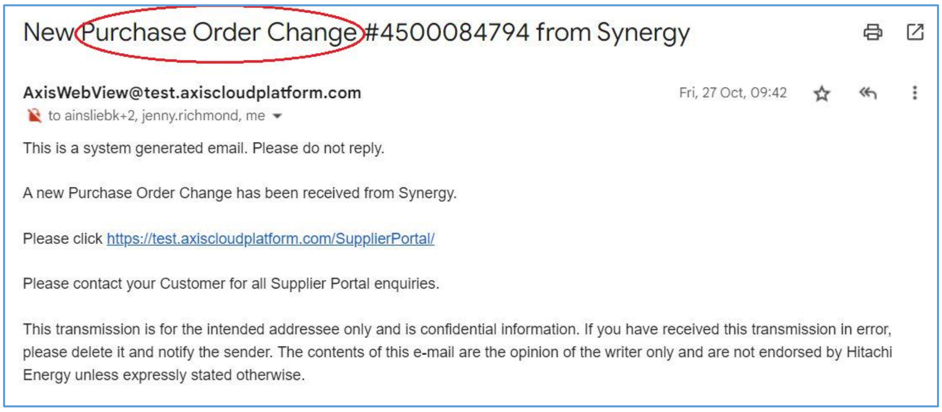
Business Rules

The following business rules govern this process:

- Each email address must be unique throughout the Axis system.
- A password must be at least 8 characters long and incorporate at least 1 upper case character, 1 lower case character and 1 numeric character.
- The same email address cannot be used for both a customer and a supplier. If a business is a customer as well as a supplier, a different email address must be used for each entity.
- A supplier's email address may be registered for multiple customers.

Email Notification

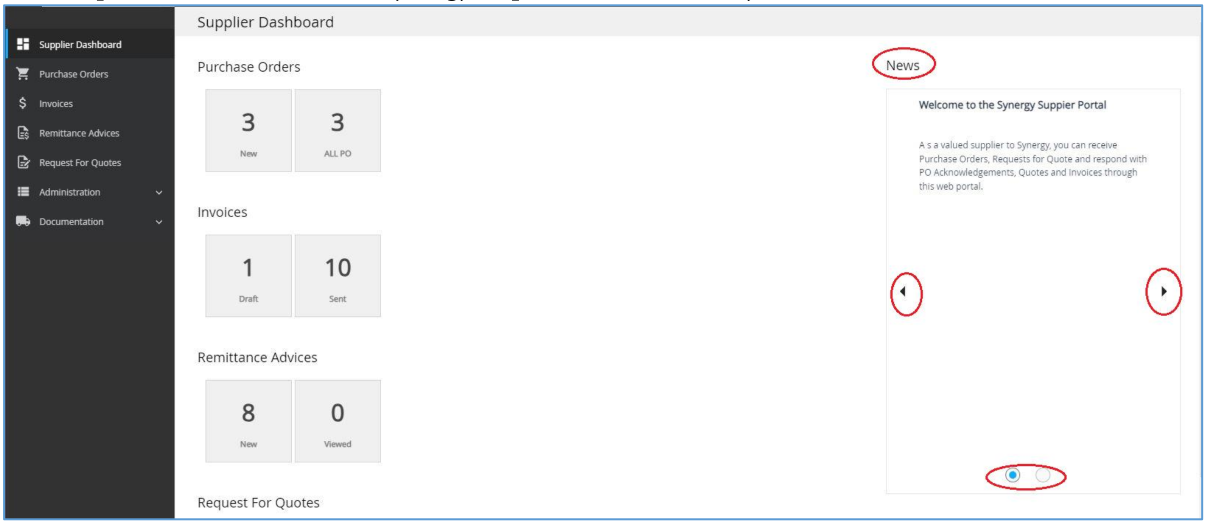
You will receive an email notification indicating a document has been sent to the Supplier Portal and needs to be actioned. The email notification will indicate the document type and will be sent to a predefined email address.
Below is a sample of the content expected in the email. The email contains the link to direct you to the Supplier Portal.



It is recommended that suppliers create a group address and have multiple users linked to the address to build a backup into the process should the primary supplier contact be away on leave. Refer to Administering the Supplier Portal, Working with Supplier Addresses and Details section below or contact the Supplier Administration User.

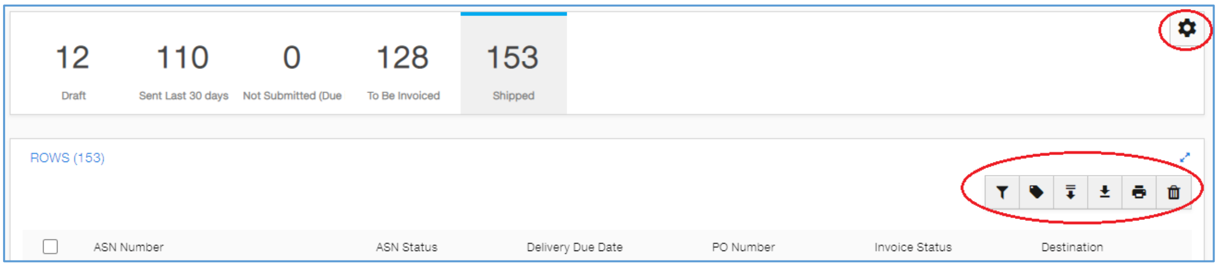
Supplier Dashboard

From the supplier dashboard you can easily see your key data. Selection of any filter box from the dashboard will transfer you to the appropriate document summary page with the nominated filter highlighted.
View important News items from Synergy. Up to 3 news items may be shown.



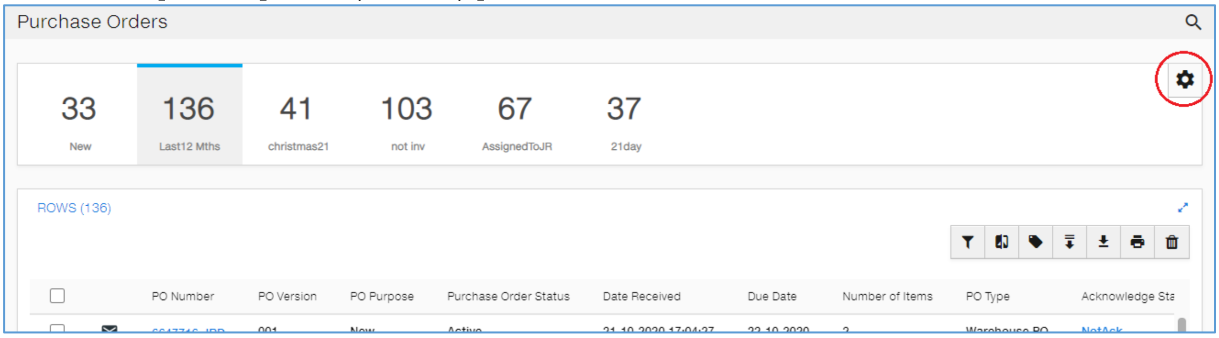
Common to all Documents

The highlighted functions are common to all of the Business Documents and are explained below for function.

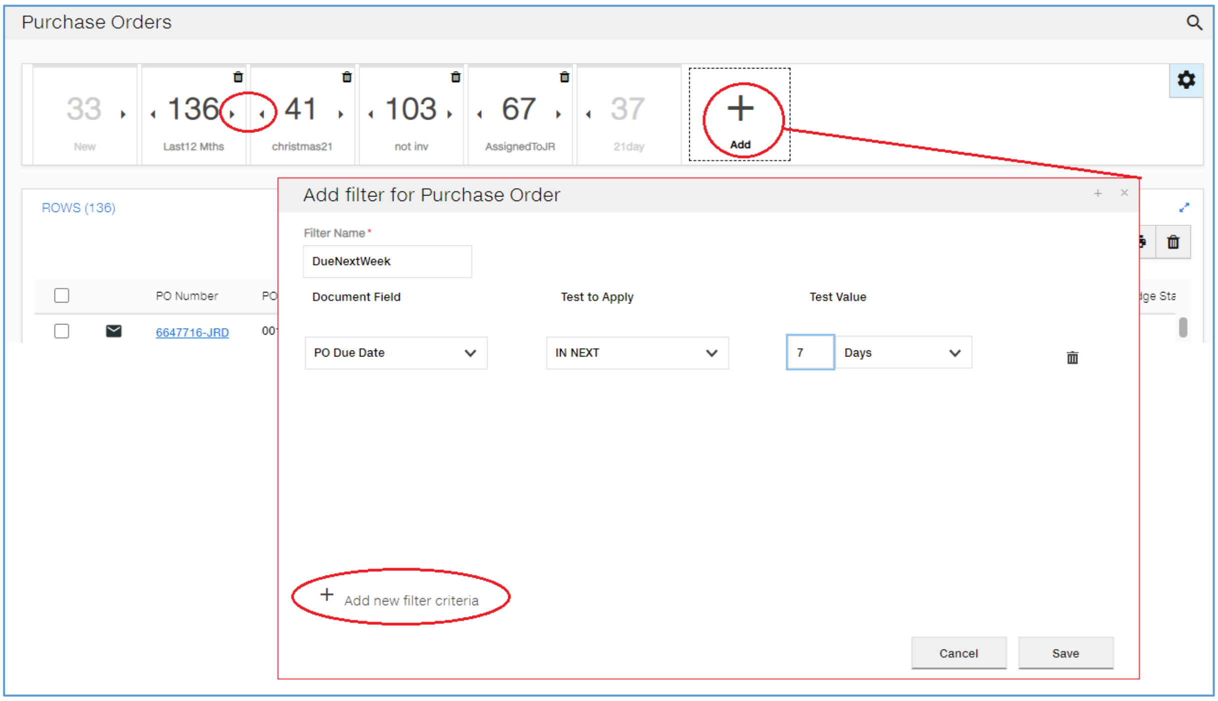


Filters

When viewing a specific documents summary list, you can refine the data displayed in the list to those documents required to perform your daily processes.

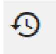


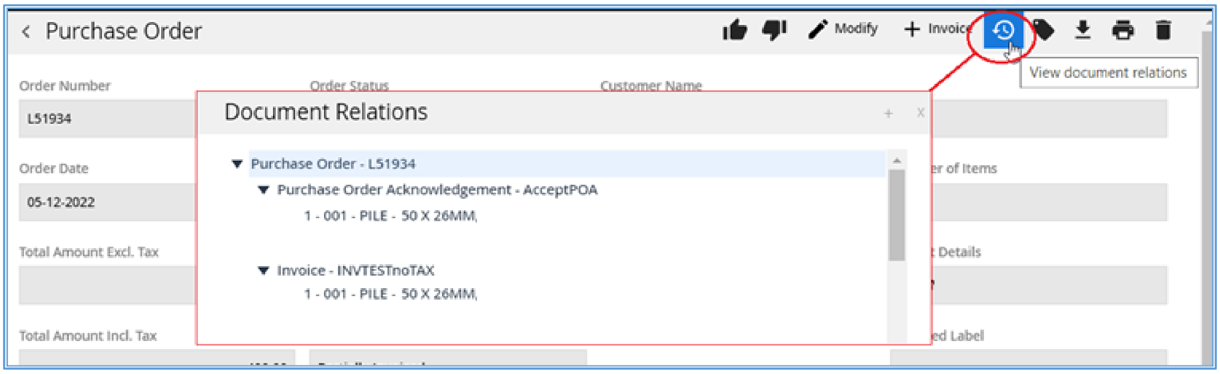
You can create, modify or delete user defined document specific filters to limit the data in the summary grid by using **Settings** in the filter ribbon box. You can also change the position of your favourite filters (click the arrows). The first filter in the list will be considered your default filter. Multiple criteria can be defined within a filter, if required.



Note: System filters cannot be changed or delete. User defined filters are only visible to the user who created them.

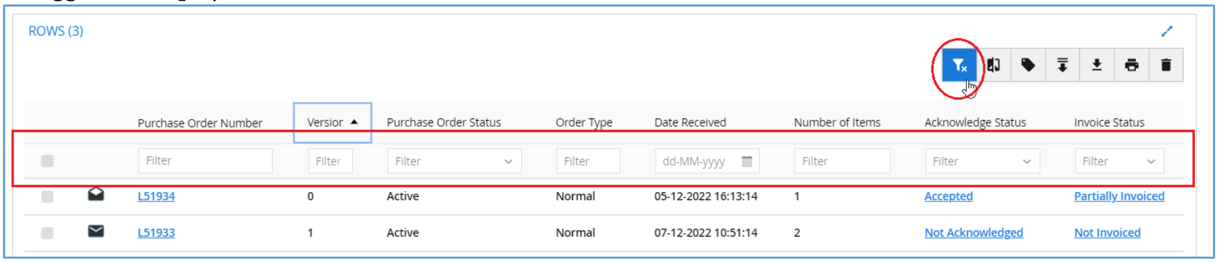
View Document Relations

You can view all the related documents for a specific document, from the documents detail page by click **View Document relations** .



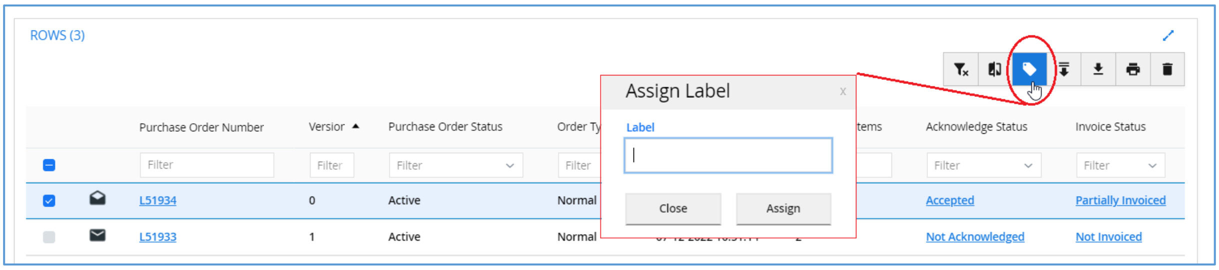
Show or Hide Filter Row

Filter the information in the grid based on a particular column attribute. Click **Show or hide filter row**  to toggle the display of row filters.



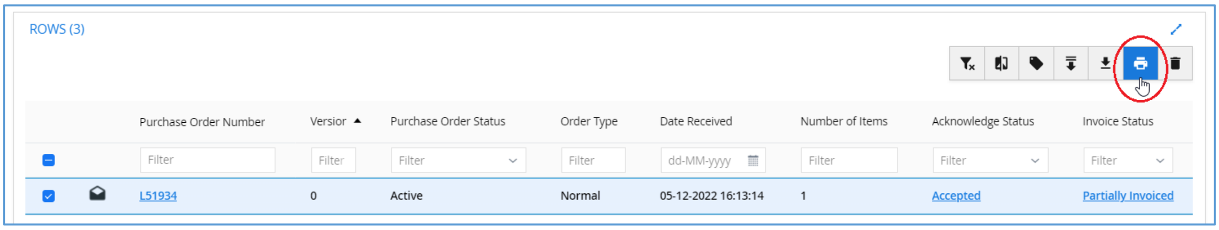
Assigning Labels

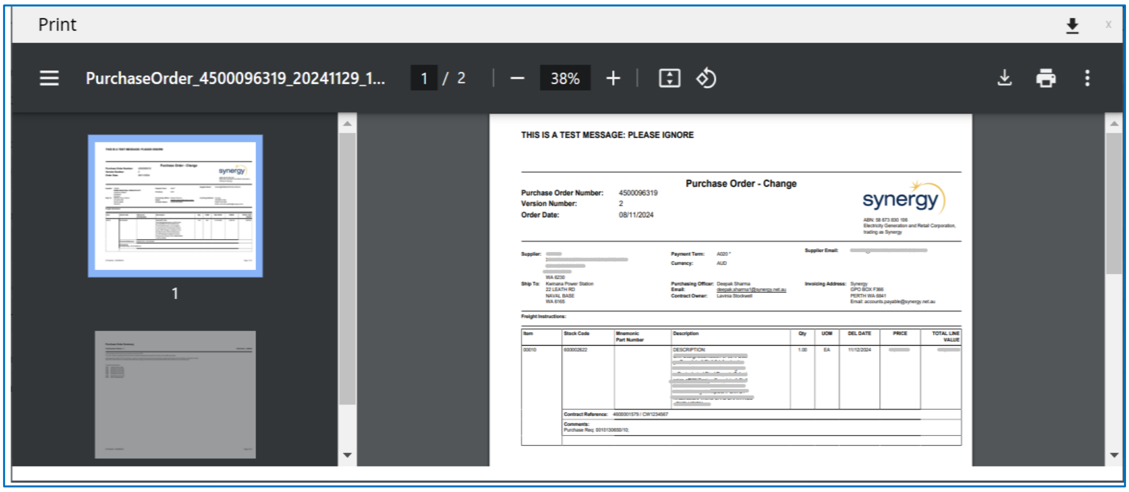
A user defined Label can be added to documents from the document summary page by click Assign Label  or on detail page of the document. You can reference the user defined label when creating a specific document filter. Labels are case sensitive.



Printing

Select the document and click Print to print the document or save the document in PDF format. You can use the Print option to assist in the review of the document details, and can print the document after processing the response as a trigger to key the document in the supplier back office system.
A maximum of 20 documents can be printed in one selection.

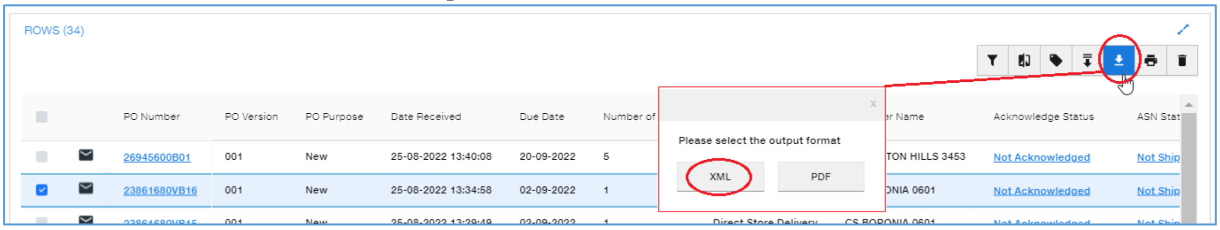




Exporting

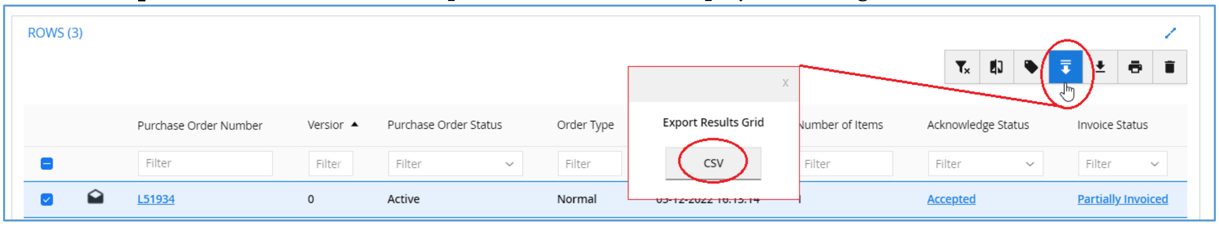
Select the document and click **Export**  to export the document to file in XML format or PDF format. This is the source file for the document and can be used to load into systems that are capable of reading XML. This is useful for suppliers migrating to integrated or electronic system to system trading. For most suppliers the export feature is not relevant.

A maximum of 20 documents can be exported in one selection.



Export Results Grid

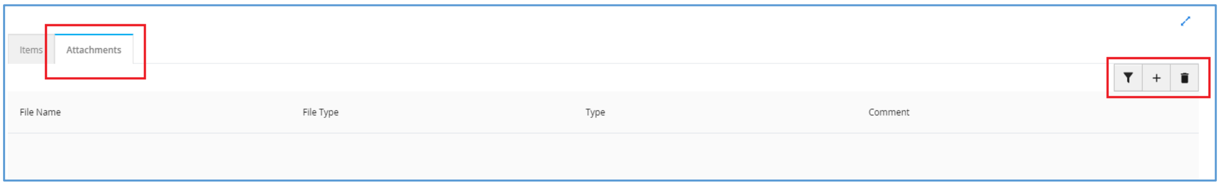
Click the **Export Results Grid**  to export the current list displayed in the grid, to a CSV file.



Attachments

Attachment types are currently available to be added to an outbound Invoice or outbound Quotation document for sending to Synergy.

Attachments can be added to a draft/in progress response or a sent response. To add an Attachment to an in progress response, first complete mandatory information in order to allow you to Save the response.
Once saved, click the Attachments tab.
Common attachments to add are drawings or supporting documentation for Quotes or Quality Assurance documents on Invoices. Your company invoice is not required when sending Invoices from Supplier Portal unless it is requested by Synergy or it has something that Synergy need in order to approve the Invoice.

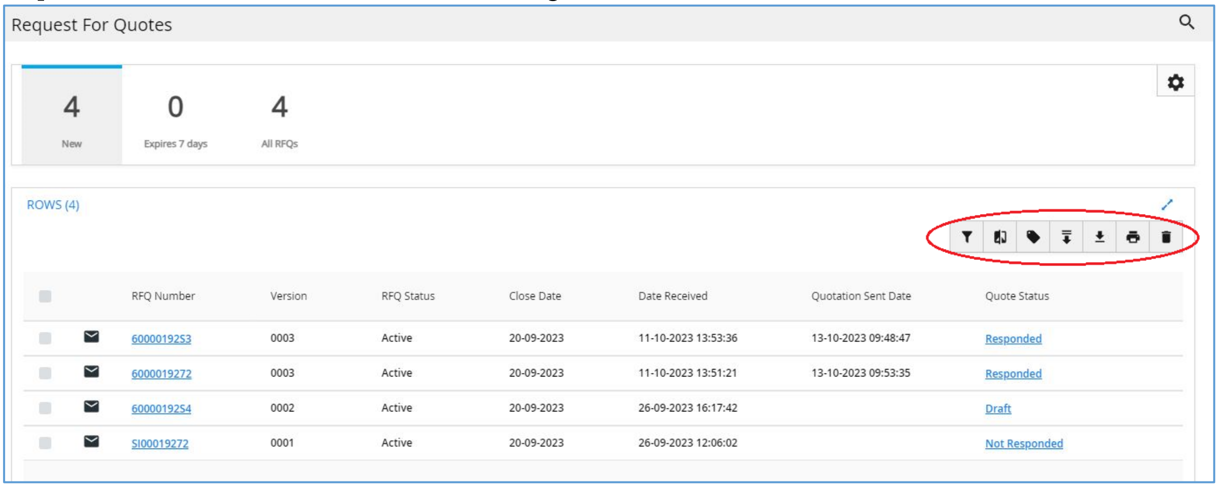


- Add attachments by clicking the Add button .
- Type = Any
- Click Browse to browse your local drive for your attachment.
- Add comments if you wish, ie the date or document type.
- Click Save.

To add an attachment to a sent response, open the sent response from Document View, for example an Invoice or Responded Quote, then open the Attachments tab.
Follow the same steps as per above to add the attachment. Once you click Save on the Attachment box, the attachment has sent to the Buyer. An Attachment will only be delivered to Synergy when it is attached to the original sent transaction with in 30 business days.

Working with Request for Quotes

You can display a summary list of the Request for Quotes (RFQs) sent to you from Synergy by clicking Request for Quotes on the main menu or selecting a filter box on the Dashboard.



Request For Quotes

4	0	4
New	Expires 7 days	All RFQs

ROWS (4)

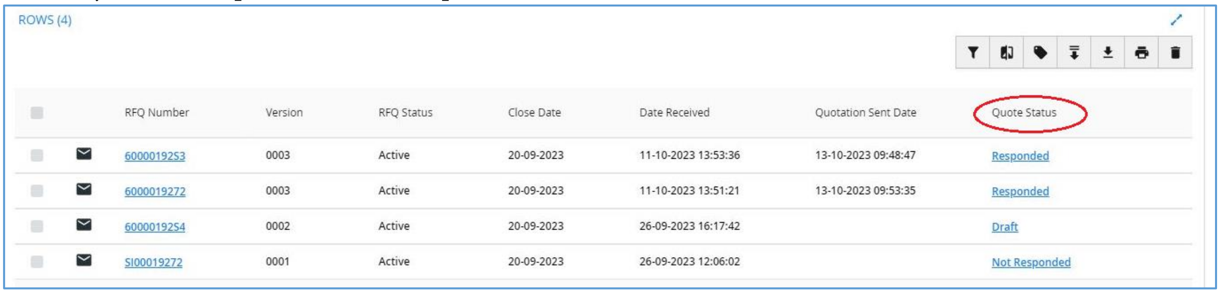
	RFQ Number	Version	RFQ Status	Close Date	Date Received	Quotation Sent Date	Quote Status
	6000019253	0003	Active	20-09-2023	11-10-2023 13:53:36	13-10-2023 09:48:47	Responded
	6000019272	0003	Active	20-09-2023	11-10-2023 13:51:21	13-10-2023 09:53:35	Responded
	6000019254	0002	Active	20-09-2023	26-09-2023 16:17:42		Draft
	SI00019272	0001	Active	20-09-2023	26-09-2023 12:06:02		Not Responded

From the Summary List screen, you can perform the below tasks:

- Search for RFQs
- Filters: Add, Modify or Remove for your login (excludes system defined filters which are static)
- Show Revisions: View changes to a new RFQ if changes have been made
- Grid Filters: Show or Hide Filter Row
- Assign Labels
- Export Results Grid: CSV file format
- Export: XML or PDF Format
- Print to PDF
- Grid Sort

Note: To view or action RFQ the permission must be allocated by your Administrator. The Administrator login will, by default, have access to all documents and actions of those documents.

The RFQ to Quote Lifecycle can be viewed via the document status displayed in the Request For Quote Summary List, ie Responded or Not Responded.

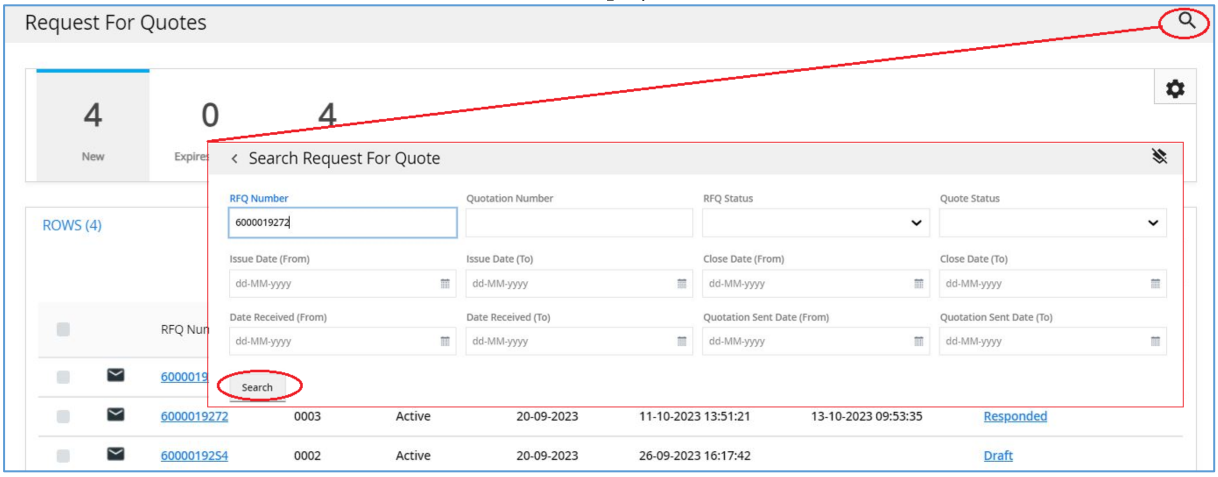


ROWS (4)

	RFQ Number	Version	RFQ Status	Close Date	Date Received	Quotation Sent Date	Quote Status
	6000019253	0003	Active	20-09-2023	11-10-2023 13:53:36	13-10-2023 09:48:47	Responded
	6000019272	0003	Active	20-09-2023	11-10-2023 13:51:21	13-10-2023 09:53:35	Responded
	6000019254	0002	Active	20-09-2023	26-09-2023 16:17:42		Draft
	SI00019272	0001	Active	20-09-2023	26-09-2023 12:06:02		Not Responded

Request For Quote Search

To search for an RFQ, select Search from the Summary Screen.
Enter search criteria and click the Search button to display results.



Review Request For Quote

From the RFQ Summary Page, select the link on the RFQ reference to review details. Click up/down arrows to expand/collapse item details. Click to hide/show RFQ header.

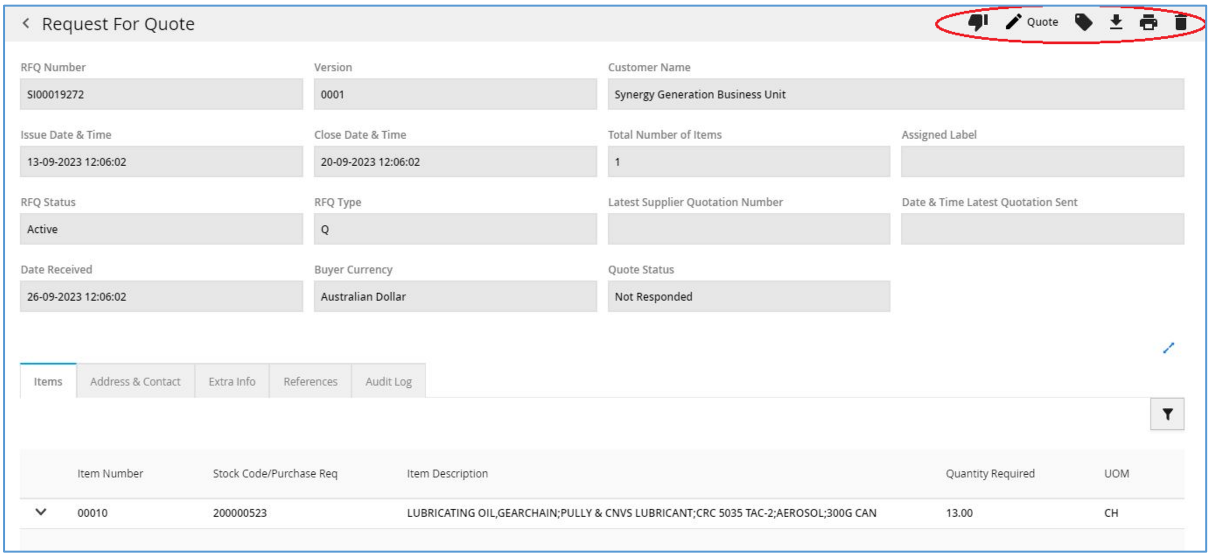
Header View

From the header view you can:

- View RFQ header specifics including Issued Date, Received Date and RFQ Close Date, Status, Currency, etc.

Action RFQ including:

- Decline to Quote
- Create Quote



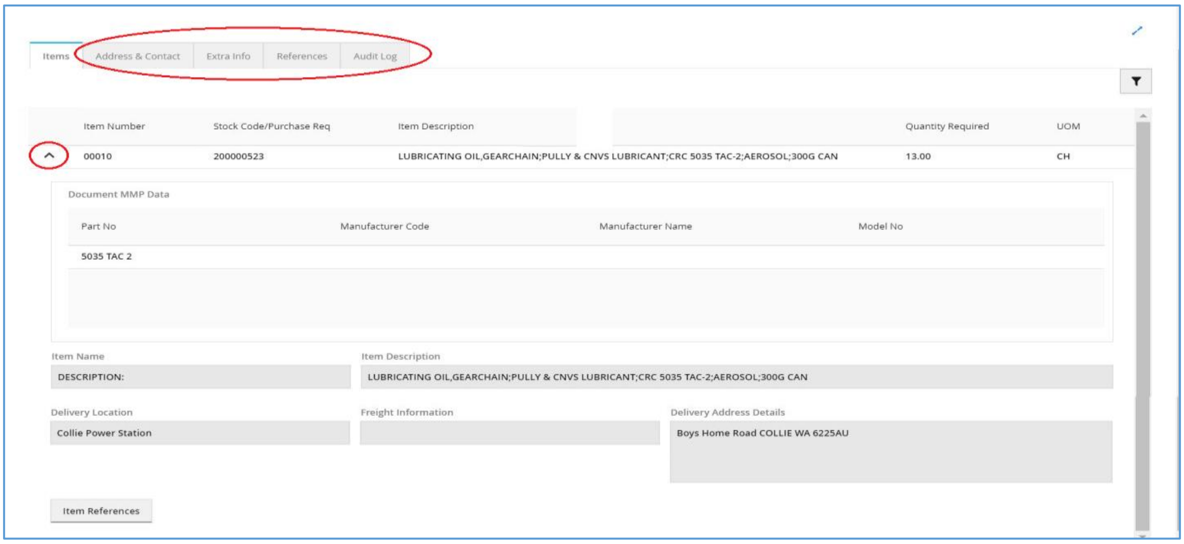
Item View

From the Item view you can:

- View Item Information

  Expand the Item to view greater item detail.

  Click Item References and Item Extra Info for more Line item detail.
- View Address & Contact details
- Terms and Conditions – View these from the PDF print copy
- View Extra Info which will detail any narrative included at the Header
- View References which will detail some RFQ specifics
- View Audit Log which will detail the history of this document and it’s connections to other documents.

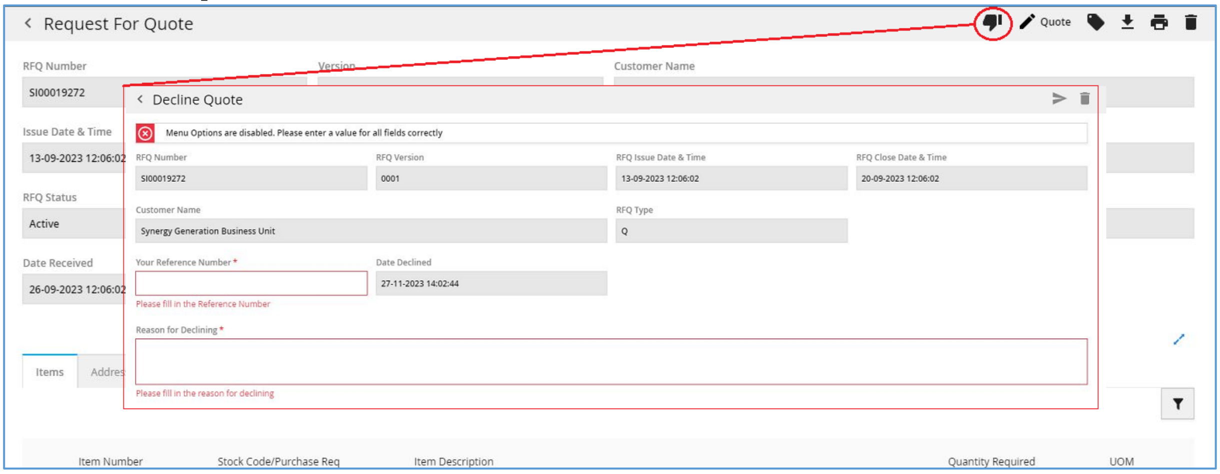


Decline to Quote

Select the RFQ and click **Reject** at the top right to reject the entire RFQ.

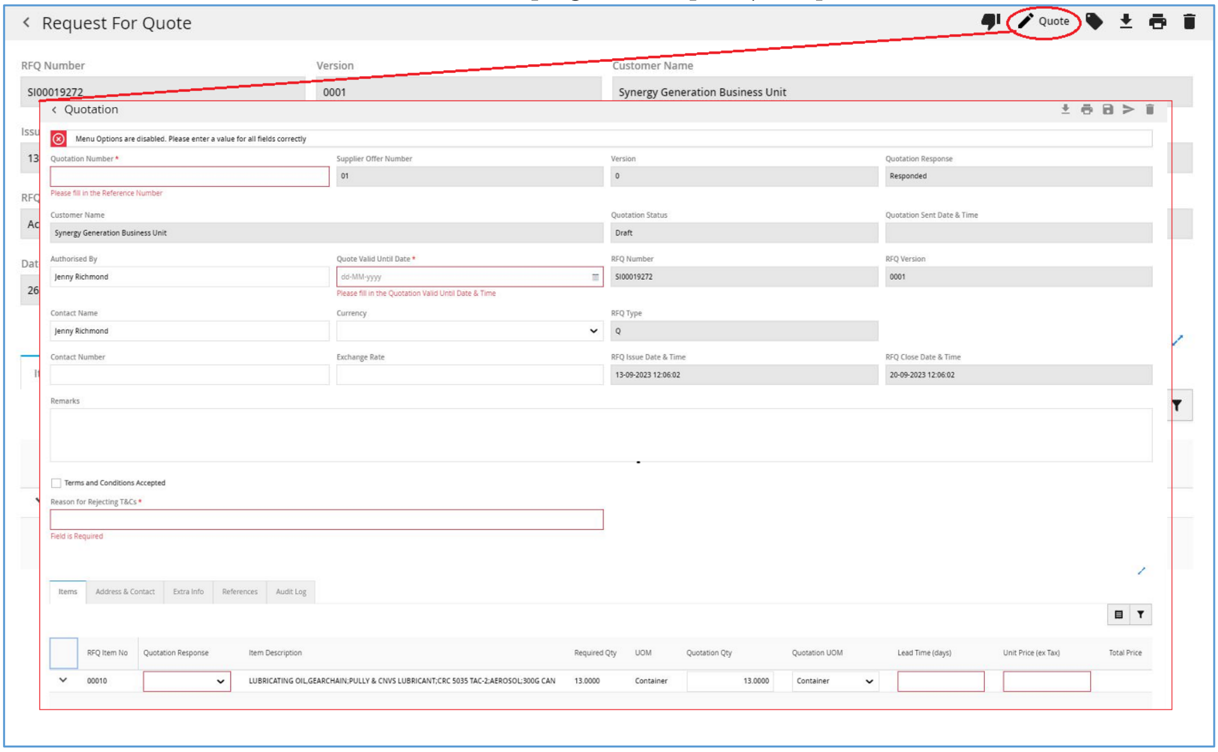
- Enter a Reference Number. This can be the RFQ number or a quote reference from your own system.
- Enter comments as to Reason for Declining.
- Click Send .

All items are updated to **Declined** and the Quote is sent to Synergy. The option to Quote again is available after a decline to quote has been submitted.



Create Quote

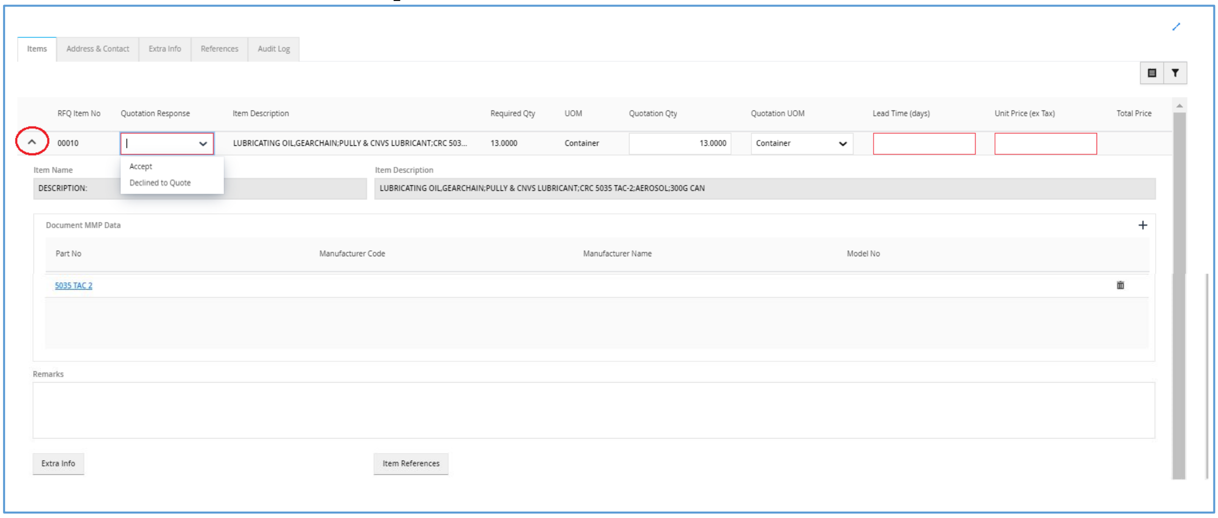
Select the RFQ and click Quote at the top right to complete your quote.



At the Header:

- Enter a Quotation Number. This can be the RFQ number or a quote reference from your own system.
- Select a "Quote Valid Until Date"
- Authorised By will default to the User ID of the account being used. It is recommended to update to an individual.
- Enter Contact Number of authorised person.
- Select Currency you are quoting in if your Quote is NOT in Australian Dollars
- Enter Exchange Rate information if applicable
- Acceptance or Rejection of Terms and Conditions: The T&Cs can be viewed from the RFQ Print copy. They are standard across every RFQ received.
    - If these terms are acceptable, tick the box "Terms and Conditions Accepted". No further reason or comments will be required.
    - If you cannot accept these Terms, do not click "Terms and Conditions Accepted" and complete the field "Reason for Rejecting T&Cs". You can send a quote while rejecting the Terms. If you mean to reject the whole RFQ, please use the Decline to Quote button on the RFQ instead.
- Enter Remarks to support or provide further information on your Quote.

At the Item:
Click next to the line item to expand the item.



Quotation Response: On a multi-line RFQ, this can be set to different responses per line if required.

Accept – Enter the following:

Quotation Qty – Defaults to the requested quantity

Quotation UOM – Defaults to the requested unit of measure

Lead time – enter in days. No decimal points

Unit Price – excluding GST

Remarks – optional, and visible for input if you expand the item.

Confirm Parts in Document MMP Data table – Remove parts that are not correct by clicking the trash can. Add parts by clicking + and completing the New Part Information or Modify existing parts by clicking on the Part number.

Declined to Quote:

Please ensure you enter a reason for Declining to Quote in the Remarks field.

Note: If declining the whole RFQ, please use the Decline to Quote option from RFQ screen. Quote should only be used to send a completed Accepted quote or a mixed response quote.

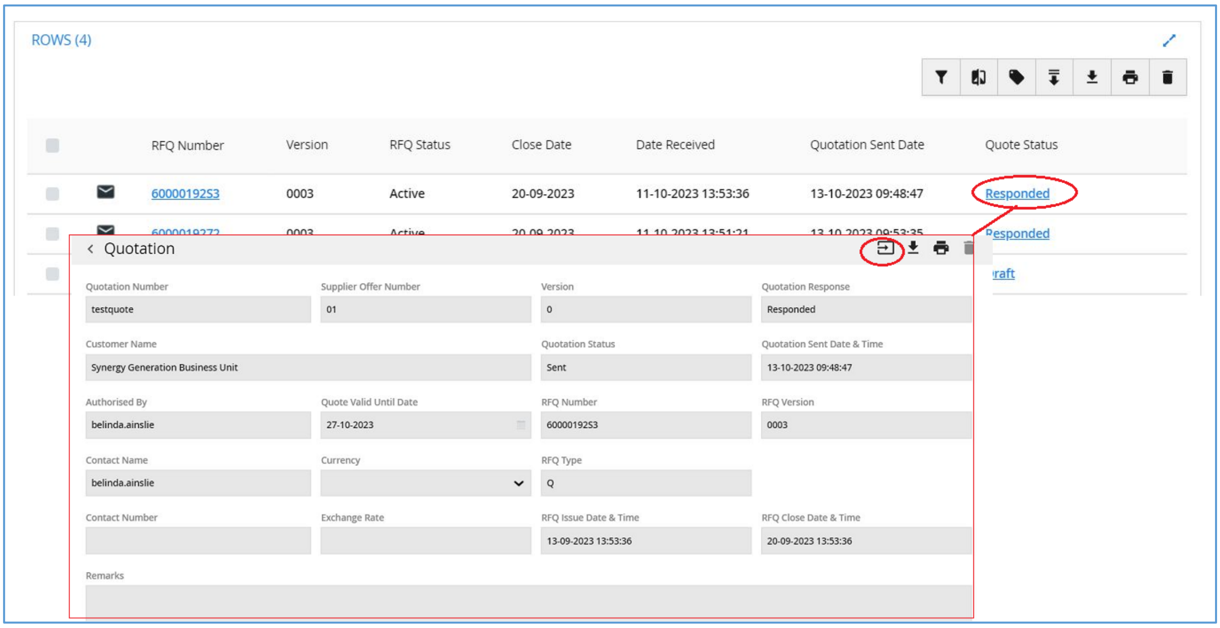
Once changes are complete, click Save to Save as a Draft and add **Attachments** if required, then click Send .

The RFQ will update with Quote Status and Quotation Sent Date and Time in the Summary List. To view the Quote sent, click Responded.

Create a Corrected Quote

If required, Suppliers can send Synergy a corrected quote to modify an existing sent document.
Open the Quote sent by clicking the Quote Status **Responded** on the required RFQ. The Quotation will appear.

Click Create a Corrected Quote button.

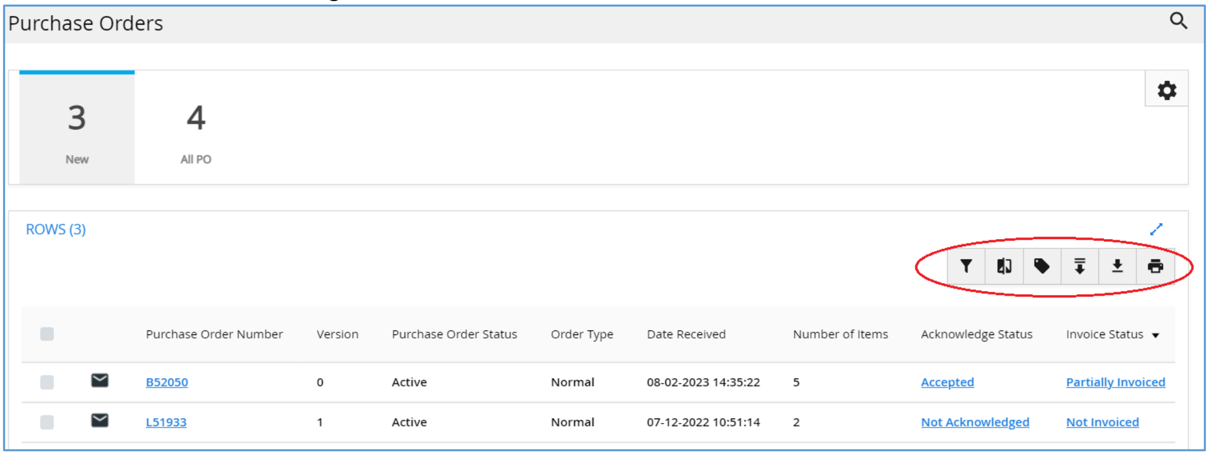


From the Corrected Quotation screen you can modify all details on the Header & Item except for the Quotation Number. Remarks are recommended to provide explanation to Synergy for the corrected quote.

Once changes are complete, click Save to Save as a Draft, then click Send. Click links to jump to Common Functions for how to on these steps.
This Quote version will replace your existing in the Portal. Synergy, however, will have received copies of both and can update the Quote on their system if needed.

Working with Purchase Orders

You can display a summary list of the purchase orders sent to you from Synergy by clicking **Purchase Orders** on the main menu or selecting a filter box on the Dashboard.



From the Summary List screen, you can perform the following tasks:

- Search for Purchase Orders
- Review purchase order details
- Print a purchase order to PDF
- Export a purchase order in PDF or XML format
- Compare versions of a Purchase Order
- Review purchase order acknowledgement

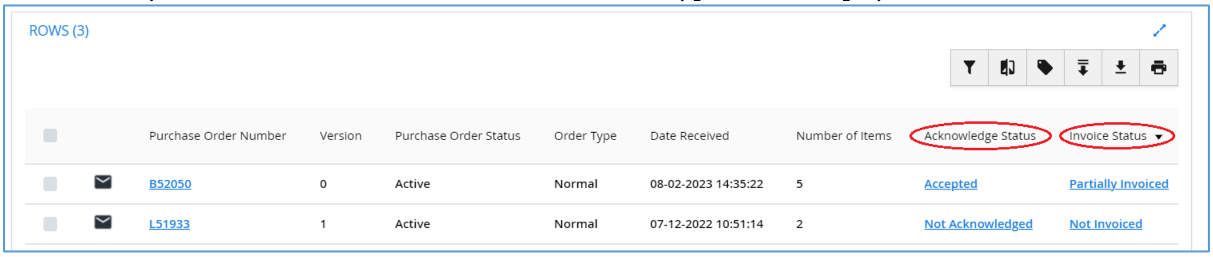
- Review invoices associated with a purchase order (when in use)

Note 1: To perform a task on a purchase order the task must be enabled by Synergy and the permission allocated by your Supplier Administrator.

The tasks available are also governed by the Status of the documents; for example, you are unable to submit an Invoice against a PO already fully invoiced, unable to submit an Invoice against a Cancelled PO, etcetera.

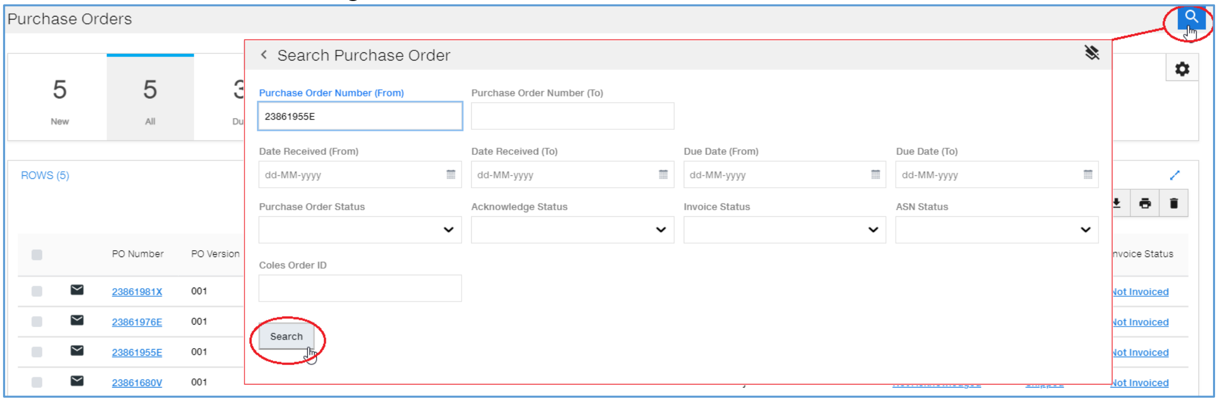
Note 2: There is no delete task, instead, Purchase Orders will be archived by system maintenance, which is usually after 12months

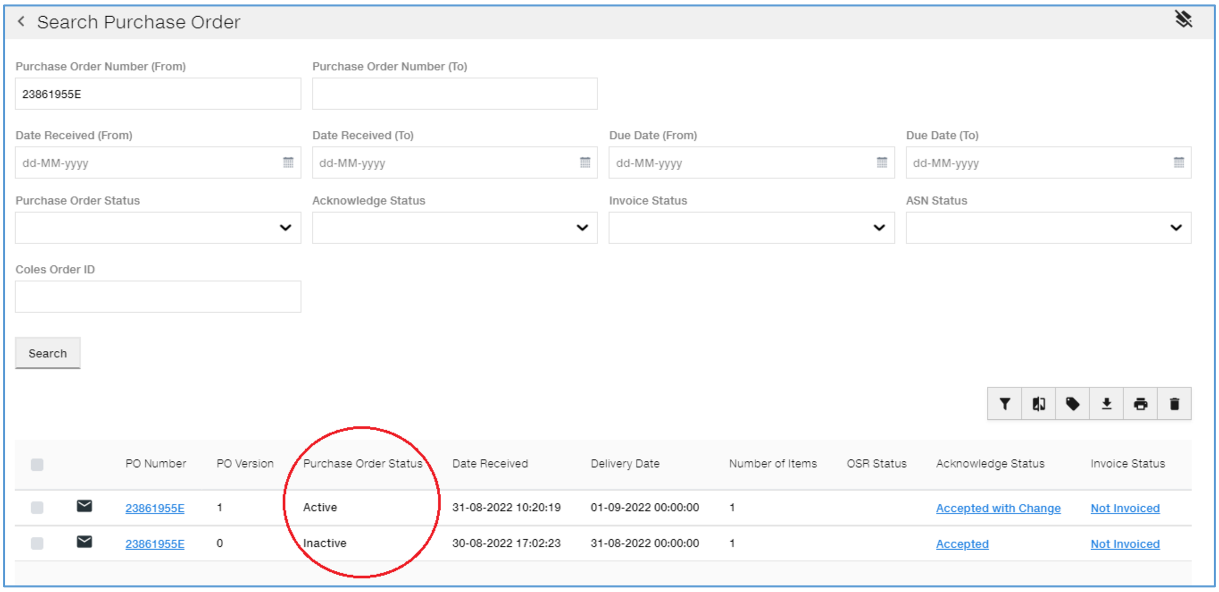
The PO Lifecycle can be viewed via the different document type status's displayed.



Purchase Order Search

Select the Search icon from the Summary Screen. Any Purchase Orders matching the entered search criteria will be returned in the grid.



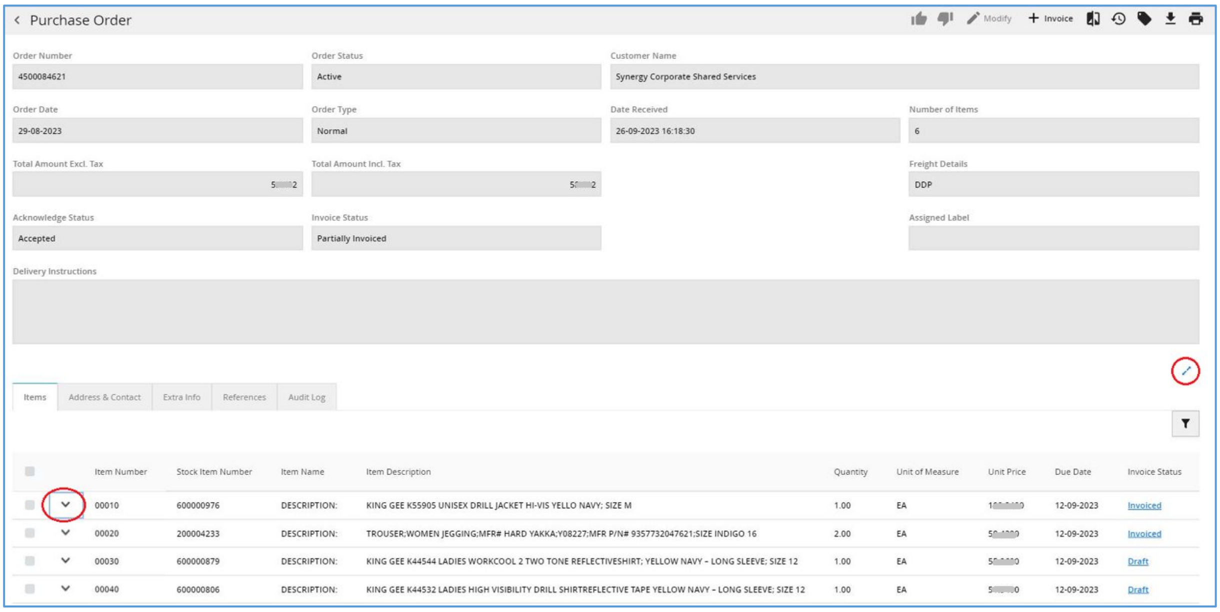


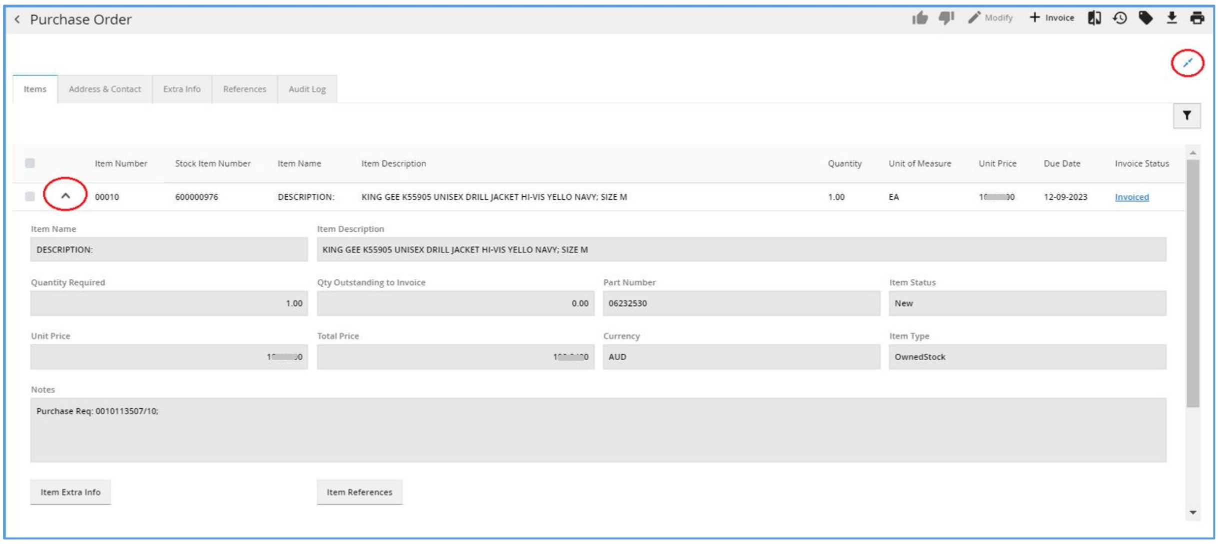
Note: Search will return all active and inactive versions of a Purchase Order. Inactive Purchase Orders can be viewed, exported, printed and deleted. You cannot action it to create a document response back to Synergy.

The PO Version displayed on this screen is the incremented revision of the order (this revision counter is tracked within the Portal).

Review Purchase Order

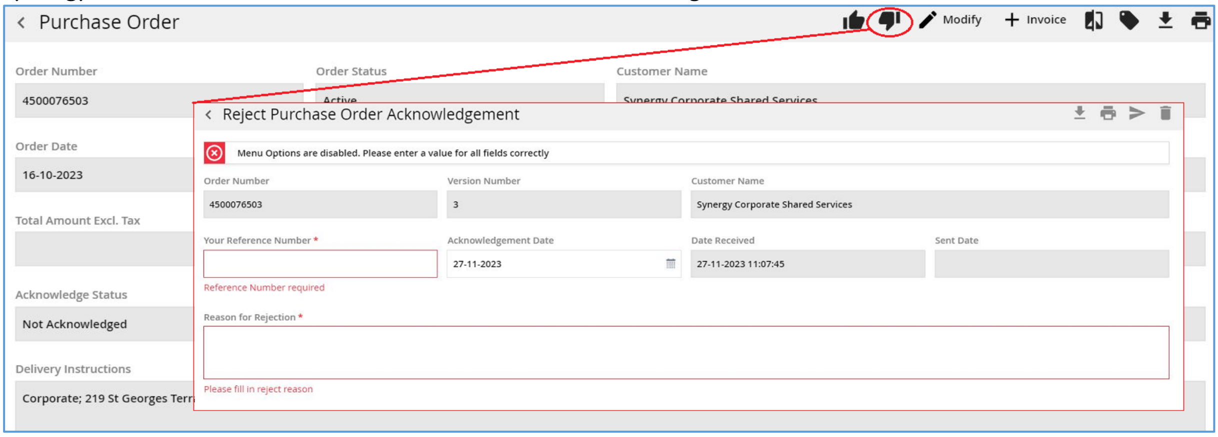
Select the link on the Purchase order number to review the purchase order details. Click up/down arrows to expand/collapse item details. Click to hide/show Order header.





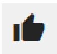
Quick Reject a Purchase Order

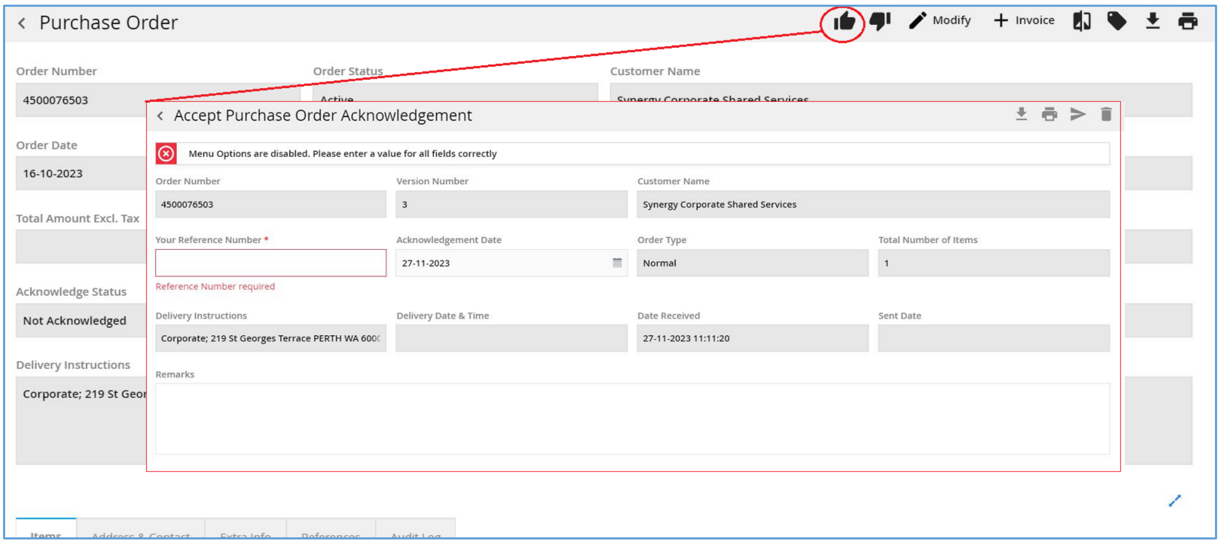
Select the purchase order and click **Reject**  to reject the entire purchase order. All items are updated to **Rejected**. An acknowledgement message is sent to Synergy to inform them that the purchase order has been rejected.
Synergy will receive and load the Purchase Order Acknowledgment status.



Note: Once the rejection has been sent, it cannot be changed, and the purchase order cannot be processed any further.

Quick Accept a Purchase Order

Select the purchase order and click **Accept**  to accept the entire purchase order. All items in the purchase order are updated to **Accepted** and an acknowledgement message is sent to Synergy.
Note: after accepting the order you should then key the order into their own back-end supply system.

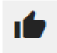


Note: Once the acknowledgement has been sent, the order can be invoiced.

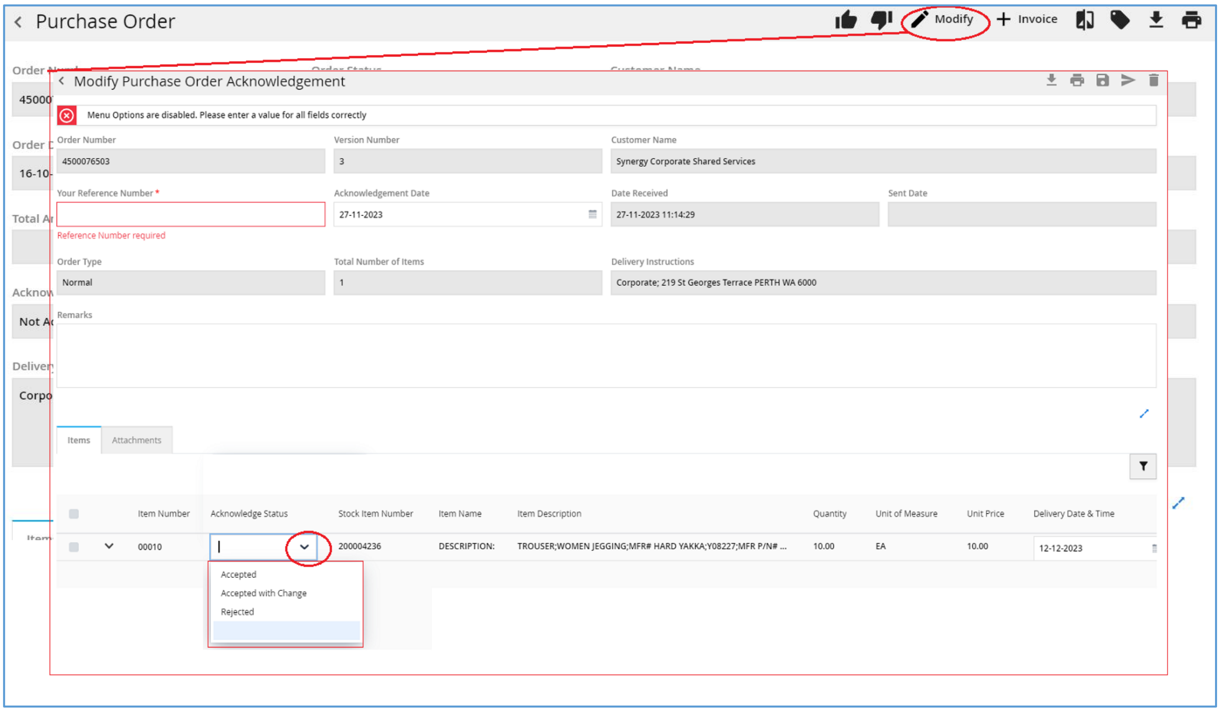
Modify a Purchase Order Acknowledgement

Select the purchase order and click **Modify** 

to suggest modifications of the purchase order details to Synergy. You need to enter the acknowledgement status for each purchase order item (Accepted, Accepted with Change, Rejected). You are able to accept one item and reject another. You can accept a purchase order item with suggested changes to certain fields on the item.

To fully accept an order, instead of modify, click **Accept**  to accept the entire purchase order in full.

Note: Only those fields defined by Synergy can be modified.



You can modify the following fields on the purchase order line item for Synergy (after selecting the Acknowledgment Status value 'Accepted with Change'):

- Delivery Date and Time

Once changes have been entered in one or more of the above fields, the supplier can generate the POA with modifications by clicking on the **Send** .

You are able to save an in-progress acknowledgment response which will be stored as a Draft. You can retrieve drafts by clicking **Purchase Orders** on the main menu and send when they have completed the acknowledgment.

		Purchase Order Number	Version	Purchase Order Status	Date Received	Number of Items	Acknowledge Status	Invoice Status
		4500076520	0	Active	08-11-2023 10:17:20	1	Accepted	Invoiced
		4500076517	0	Active	08-11-2023 10:16:53	1	Accepted	Invoiced
		4500076503	3	Active	20-10-2023 13:15:11	1	Not Acknowledged	Not Invoiced
		4500076504	1	Active	16-10-2023 12:51:01	1	Draft	Not Invoiced
		4500076501	0	Active	11-10-2023 16:20:06	1	Accepted	Invoiced

Synergy will receive and load the POA with modified details and either accept or reject these changes. A change order will then be generated and sent you for actioning.

Note where an order has had a modification proposed you **should not** process any part of the order in your own back end supply system. Synergy will review the proposed changes and will accept, reject or discuss with you with the view of raising a change order or new purchase order as appropriate. You will then be required to then action the new document.

> **Note:** Invoices are created based on the active Purchase Order document (not the proposed changes in the Acknowledgment).

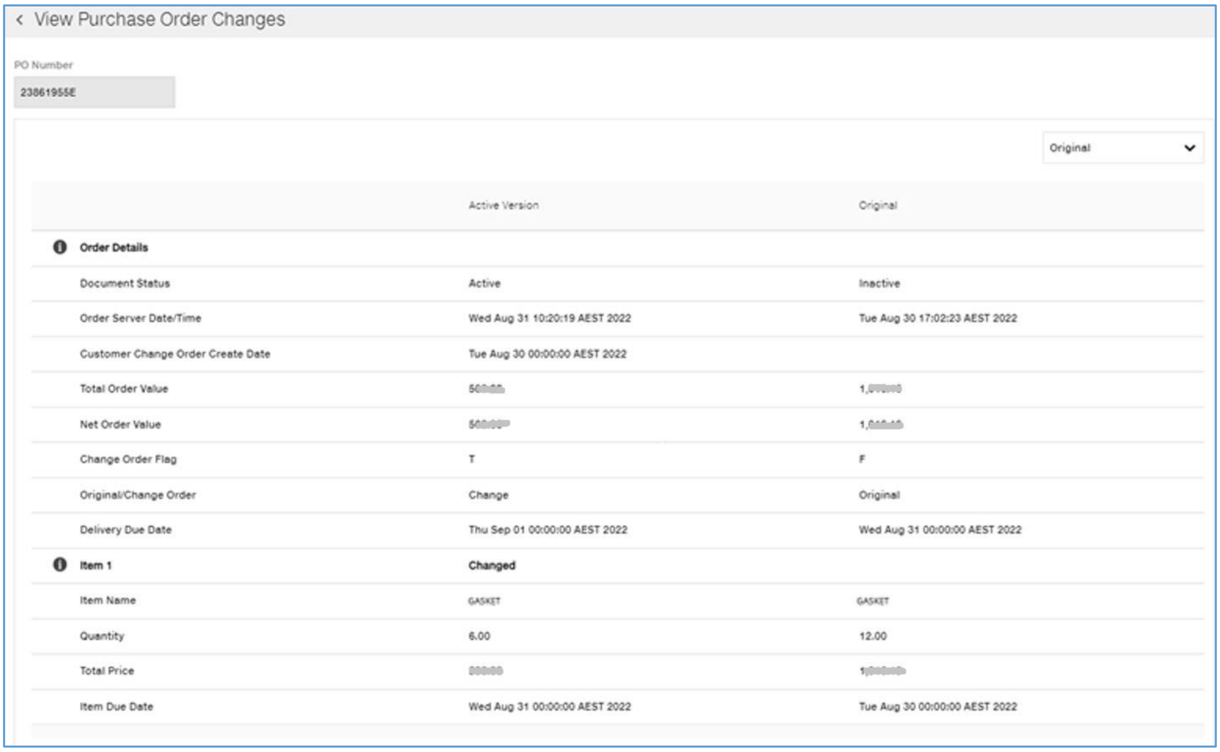
Once a purchase order has been acknowledged the Acknowledge Status on that Purchase Order will be revised from 'Not Acknowledged' to 'Accepted', 'Accepted with Change' or 'Rejected' depending on the acknowledgment type the supplier responded with. This Acknowledge Status makes it easy for you to identify what orders you have responded to and how you responded.

Compare Purchase Order Revision

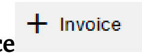
When you send acknowledgements with modifications, or acknowledgements that have a reject status, Synergy will process these and generate a Purchase Order Change document to confirm they either; accept the modifications to the original purchase order, are proposing a different amount or they are cancelling the order.
Only a single Purchase Order entry is displayed in the Axis Supplier Portal, Purchase Order Changes are indicated by the incremented revision of the order (this revision counter is tracked within the Portal).

Select the purchase order and click **Show Revision** to compare previous revisions of a purchase order. On entry, the Active version and the most recent previous revision will display. You can compare other revisions to the Active version by selecting the required revision to compare from the dropdown. The details and items will initially be collapsed. You can see at the item header level which items have been added, deleted or changed. The item number and item name are always shown, otherwise only those fields which have changed will be shown.

Note: Not all revisions may be available for comparison.



Add to Invoice

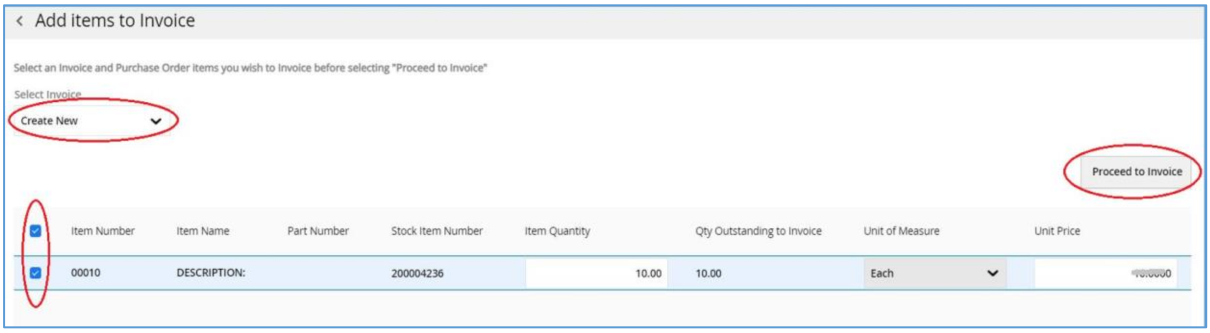
Select the purchase order and click + **Invoice** 

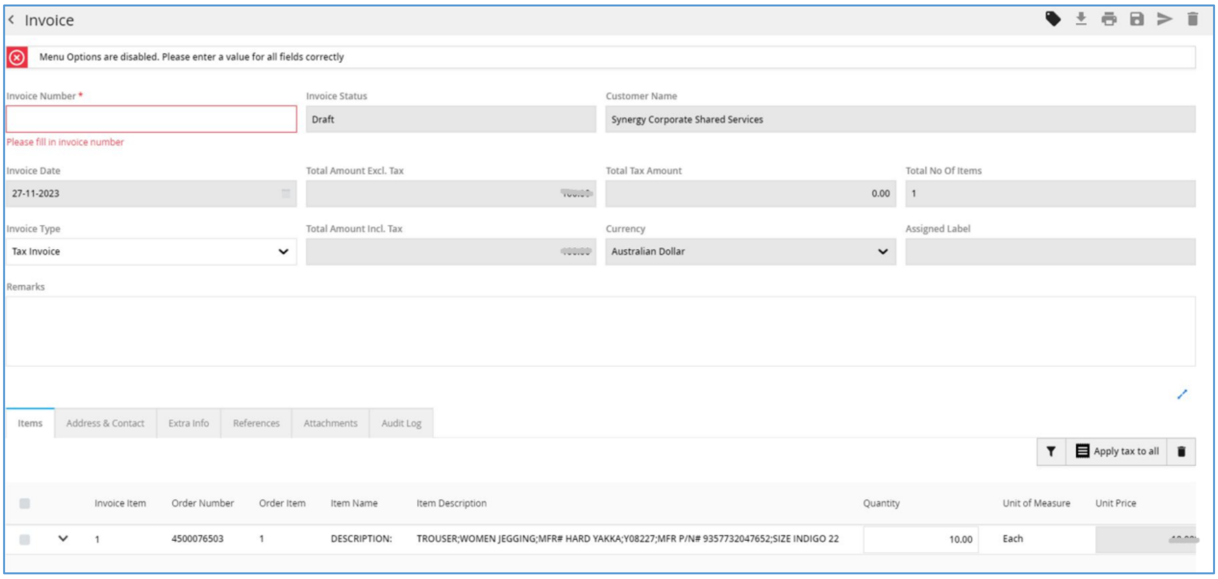
to invoice in detail.
To create a new invoice, you need to select ALL the order items being added to the invoice before proceeding to the invoice detail page, to invoice in full.
Invoice tracking does not allow more than the original quantity to be invoiced.

Partial invoices are permitted, on the invoice detail page

- For goods orders the quantity can be reduced; invoice tracking does not allow more than the original quantity to be invoiced.
- For service type orders, the amount can be reduced; invoice tracking does not allow more than the original amount to be invoiced.

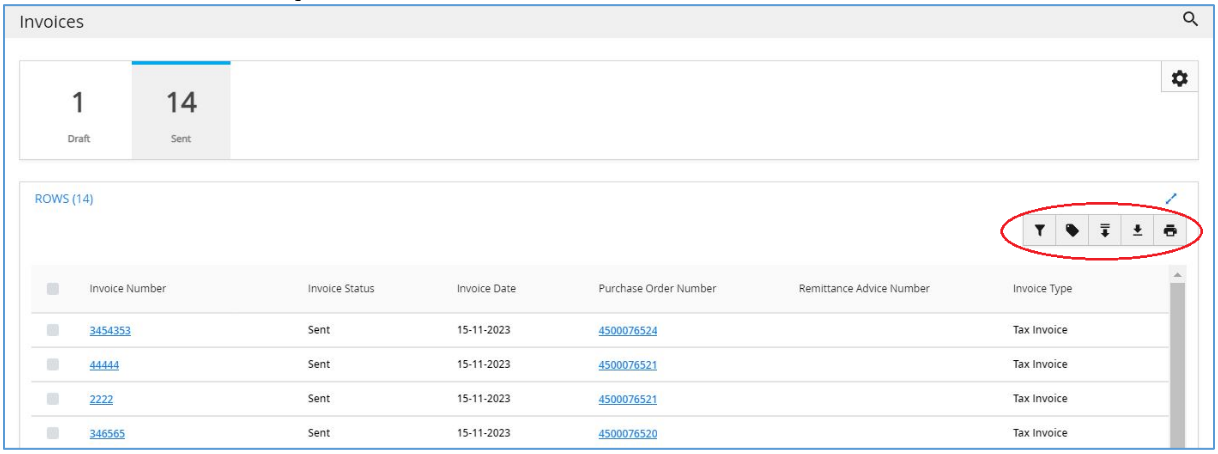
Refer to working with invoices section below.





Working with Invoices

You can review a summary list of the invoices currently in draft or sent to Synergy by clicking **Invoices** on the main menu or selecting a filter box on the Dashboard.



From this screen, you can perform the following tasks:

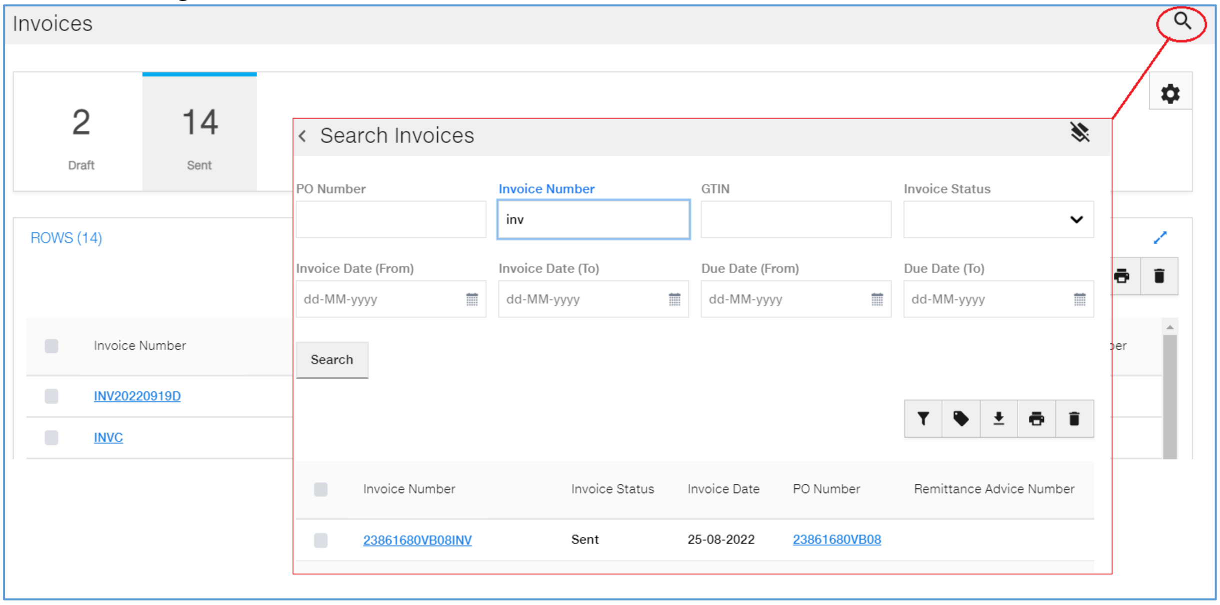
- Search for an Invoice
- Review your invoice list
- Review the invoice details
- Export an invoice in PDF or XML format
- Print an invoice to PDF
- Send an invoice
- Delete an invoice (when in Draft)
- Modify an invoice (when in Draft)
- Create a Corrective Invoice (when in Sent)
- View the Purchase Order(s) associated with the Invoice

Note: To perform a task on an Invoice the task must be enabled by Synergy and the permission allocated by your Supplier Administrator.

Note 2: There is no delete task once an invoice is sent, sent Invoices will be archived by system maintenance.

Invoice Search

Select the Search icon from the Summary Screen. Any Invoices matching the entered search criteria will be returned in the grid.



Review Invoices

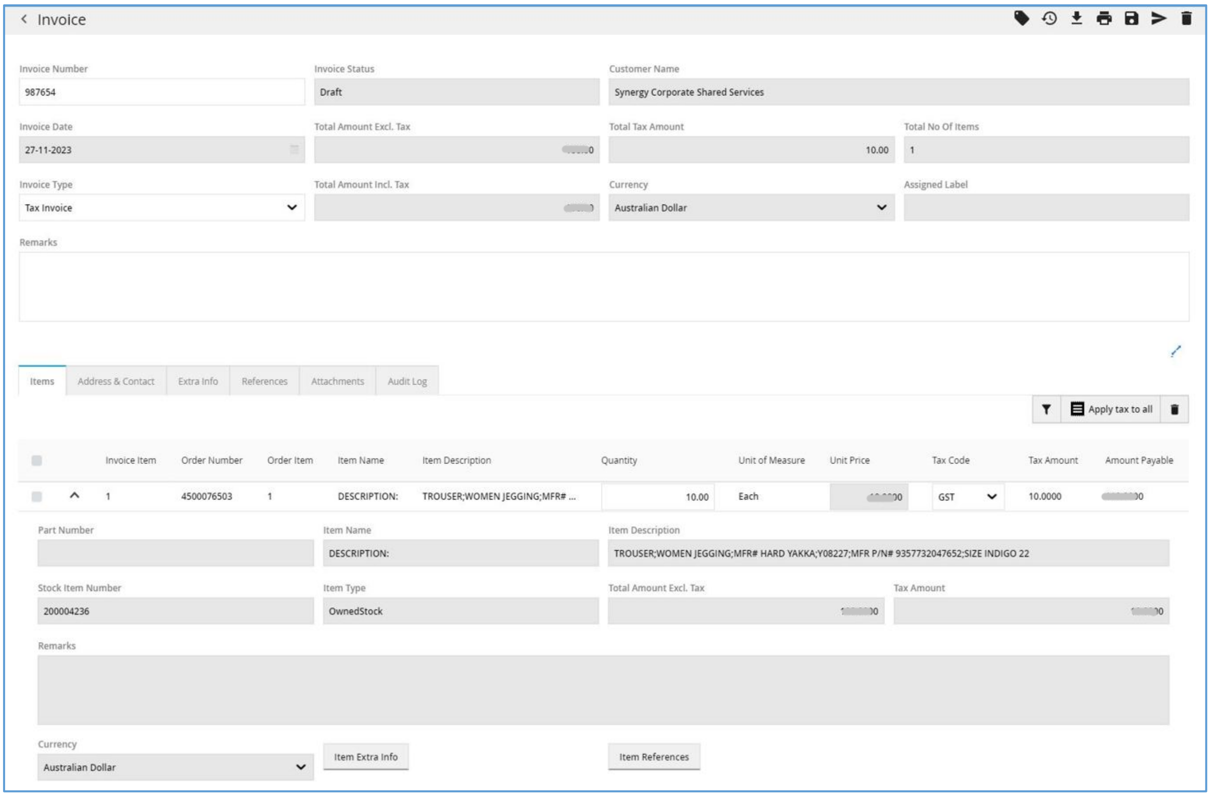
Click on an invoice to open the **Invoice Details** screen to view the details of the invoice.

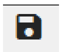
Invoices in Draft (Maintain and Send Invoices)

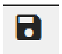
Click on an invoice with a status of draft to open the Invoice Details screen to maintain the details of the invoice and send the Invoice.

Invoice Details

Click on an invoice to open the **Invoice Details** screen to maintain the details of the invoice.



Upon selecting the ‘Save’ link  on the Invoice, the invoice total values will automatically be populated, and the print invoice options will become available.
Refer to the Invoice Processing Rules Section.

Once all invoice details are completed, save , add **Attachments** if required and then send  the Invoice.

Note: The Business Code sets for ABN/GST Number to be defined before being able to send an invoice. Refer to Administering the Supplier Portal, Working with Supplier Business Code Sets section below or contact the Supplier Administration User.

Invoice Processing Rules

You are required to complete the necessary fields to generate the invoice. Below is a summary of the invoice header fields and the business definition of the data contained in those fields and the process expected by Synergy.

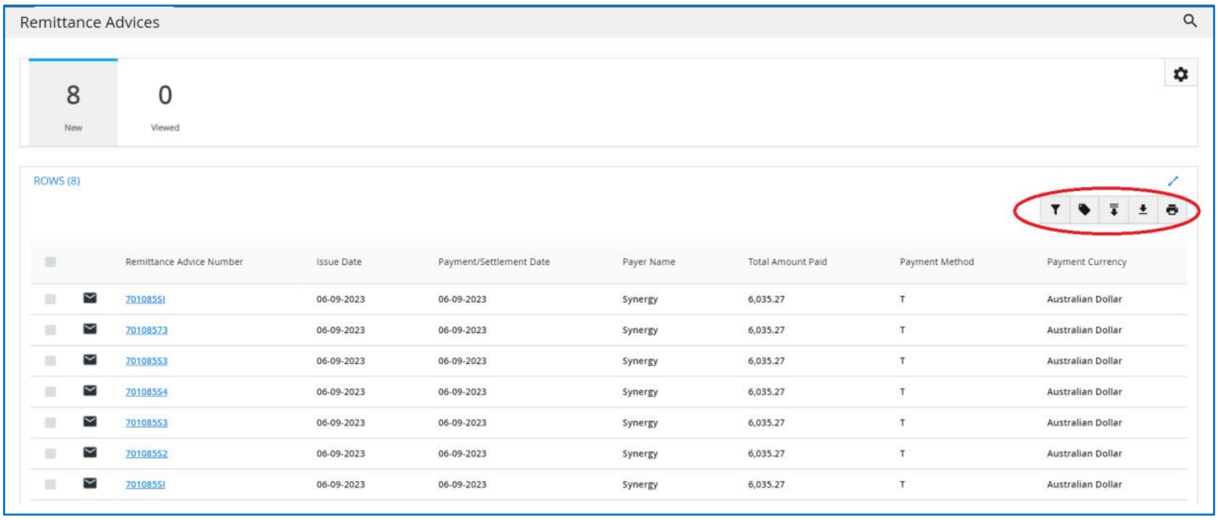
INVOICE HEADER DETAILS	
Field Name	**Description**
Invoice Number	• Supplier unique invoice number to be entered • Alpha and Numeric characters are accepted only. Alpha characters will be converted to upper case on Save/Send • This is a mandatory field
Synergy	• Synergy name as per the Purchase Order • This field cannot be amended
Invoice Date	• This is the date on which the Invoice is created, the default value is today's date • This is a mandatory field
Total Amounts	• Total Invoice Amounts Excluding Tax and Including Tax are system generated
Total Tax Amount	• Tax (GST) amounts are system generated
Invoice Type	• Defaults to Tax Invoice. • This field cannot be amended
Assigned Label	• A user defined label can be added, which can then be referenced when creating a specific document filter in the Supplier Portal. • This is an optional field, which is not included in the invoice data sent to Synergy
Remarks	• Enter Remarks to support or provide further information on your Invoice. • This is an optional field.

Below are a summary of the invoice line item fields and the business definition of the data contained in those fields and the process expected by Synergy.

INVOICE LINE DETAILS	
Field Name	**Description**
Invoice Item	• This is the supplier invoice line number • For each Invoice a number is generated in sequence by the system, this field cannot be amended
Order Number	• The Order Number selected at time of Invoicing off the PO • This field cannot be amended
Order Item	• Synergy purchase order line number • This field cannot be amended
Item Description	• The name of the item as per the purchase order details • This field cannot be amended
Quantity	• The quantity for which the invoice is being created • Value defaults from the PO, or the quantity outstanding to invoice • When a **Service Order** this field cannot be altered
UOM	• The Unit of Measure/Purchase to which you will be invoicing • Value defaults from the UOP from the PO
Unit Price	• The line-item's Unit Price as specified from the Purchase Order • When a **Service Order,** then this field can be altered. The default value is the amount outstanding to invoice
Tax Code	• You MUST assigned a valid tax code assignment to the Invoice line item. • The list of Tax codes that you can assign, you will have to have predefined in your account Business Code sets. • Refer to section **Working with Supplier Business Code Sets**
Tax Amount	• Tax (GST) amounts are system generated
Amount Payable	• The subtotal of the item, calculating Quantity * Unit Price Including Tax • System generated; this field cannot be amended

Working with Remittance Advices

You can display a summary list of the remittance advices sent to you from Synergy by selecting Remittance Advices on the main menu or selecting a filter box on the Dashboard.



From this screen, you can perform the following tasks:

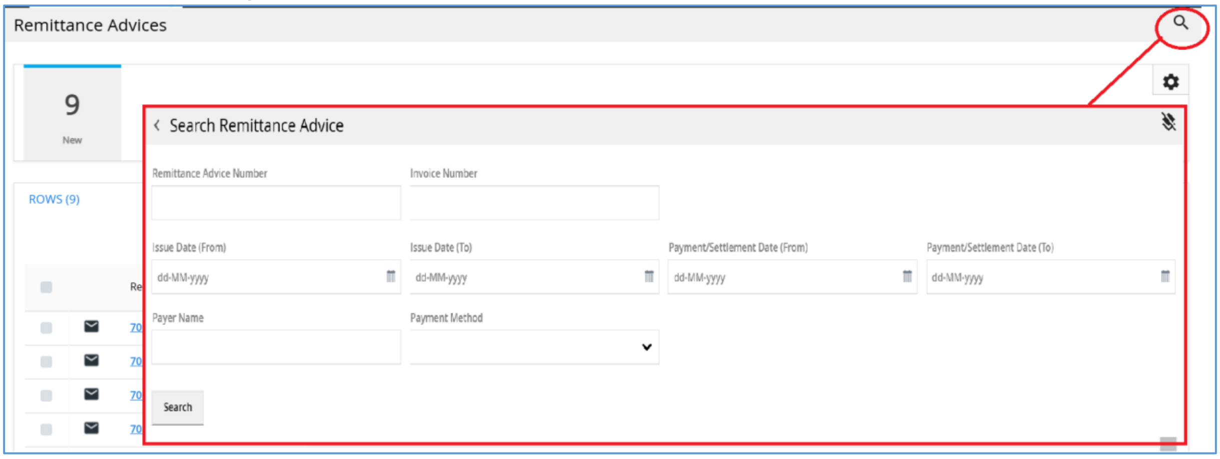
- Search for a Remittance Advice
- Review your remittance advice list
- Review the remittance advice details
- Export a remittance advice in PDF or XML format
- Print a remittance advice to PDF
- View the Invoices associated with the Remittance Advice

Note 1: To perform a task on a remittance advice the task must be enabled by Synergy and the permission allocated by your Supplier Administrator.

Note 2: There is no delete task, instead, remittance advices will be archived by system maintenance.

Remittance Advice Search

Select the Search icon from the Summary Screen. Any Remittance advices matching the entered search criteria will be returned in the grid.



Review Remittance Advices

Click on a remittance advice number to open the **Remittance Advice Details** screen to view the details of the remittance advice.

Click on the Invoice Number to view the Invoices associated with the Remittance Advice.

Once a Remittance Advice is received, the Status on that Invoice will be revised from ‘Sent’ to ‘Fully Paid’.