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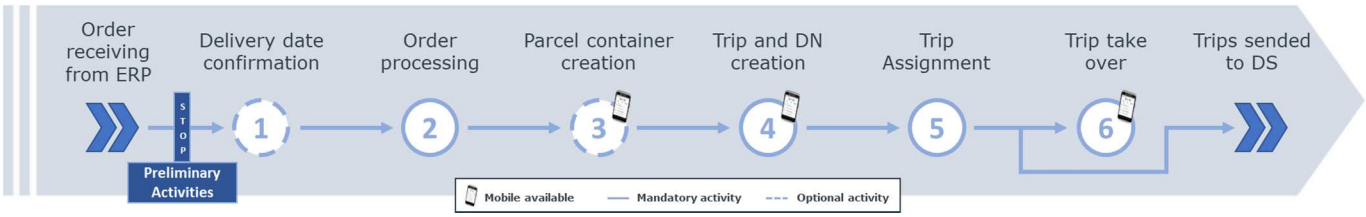
SUPPLIER PORTAL - User Manual

SP PROCESS

This paragraph details the process of managing orders and the trips they generate by the suppliers managed on Supplier Portal.

This process develops from the receipt of the order by the supplier until the carrier takes charge of the trip, at the supplier itself.



1. **Preliminary activities:**
   - **Acceptance of conditions of use**: upon first access to the SP, suppliers must accept the conditions of use to proceed with use of the system.
   - **Personal data validation**: to validate your personal data, you need to verify your information and confirm it via the supplier registry.
2. **Confirm delivery date**: optional activity that allows you to confirm the date requested by Merlo or propose a different one.
3. **Processing orders and creating parcels**: allows you to process the orders received. The suppliers, starting from the order lines, create the parcels and finish them. They print the labels (it is also possible to create secondary parcels and insert it into an existing parcel).
4. **Creation of master packages**: allows the aggregation of packages within a secondary packaging.
5. **Creation of trips and delivery notes**: this functionality allows you to generate aggregations of packages/ master packages/ delivery notes to be sent (creation of delivery notes related delivery).
6. **Trip Assignment** and **Aggregation**: this functionality allows you to generate an aggregation of packages to be shipped (with related creation of DDT), group the previously created trips and indicate the carrier to which the transport will be entrusted.
7. **Acceptance of trip**: in this phase, the carrier declares the acceptance of the transport documents.

PRELIMINARY ACTIVITIES

Preliminary activities include:

- Acceptance of conditions of use
- Validation of personal data

Acceptance of conditions of use

The process involves:

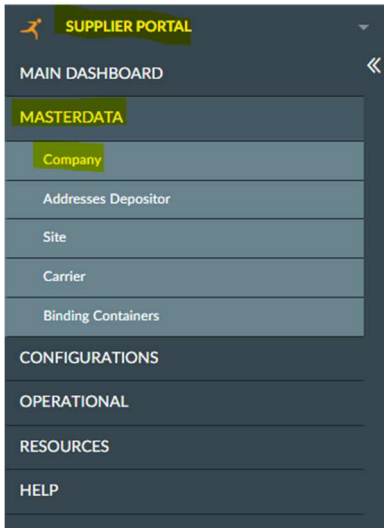
1. Click on the acceptance check boxes.

2. Click on the "ACCEPTANCE" button.

Master Data Validation

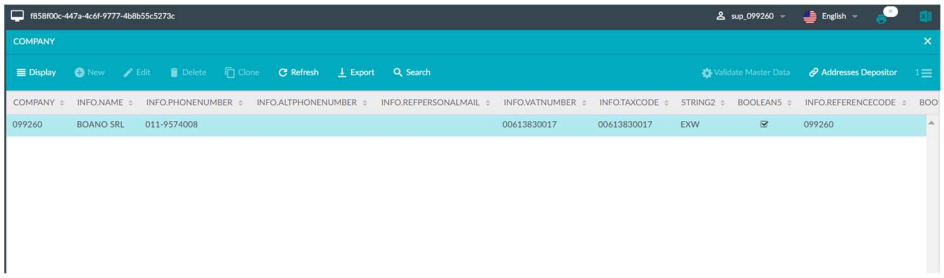
It will be mandatory to validate the master data in order to be able to use the main operations of the system.

To validate your master data, you need to verify your information and confirm it via the Menu Masterdata → Company.

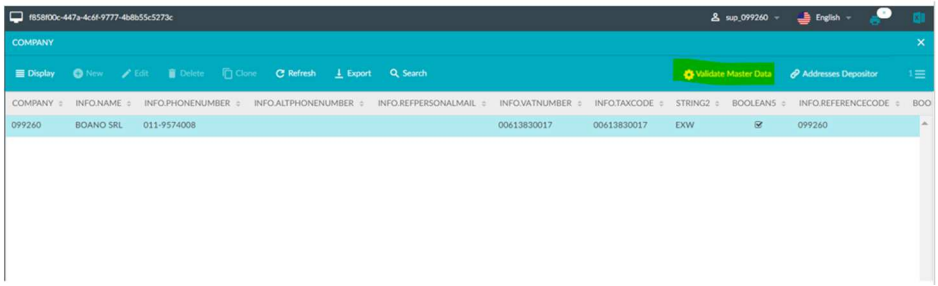


The process involves:

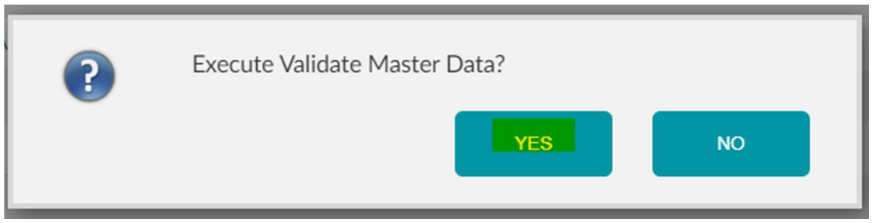
1. Selection of the supplier to validate.



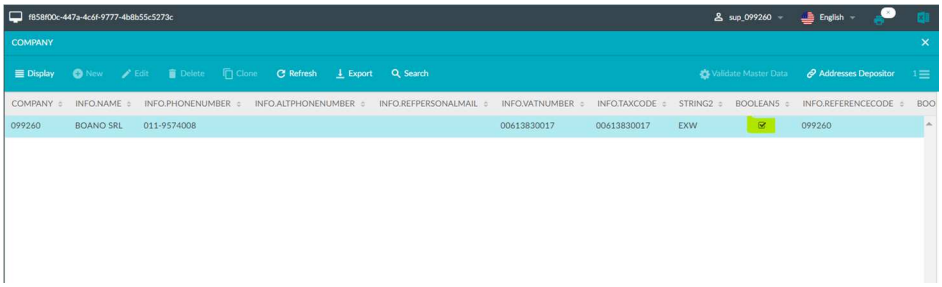
2. Click on the "Validate Masterdata" action.



3. Click on “YES”.

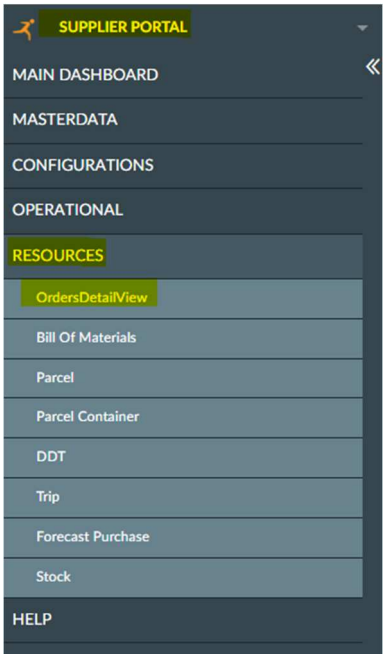


After performing the above tasks and clicking on reload, the field “Validated masterdata” will be flashed to TRUE.



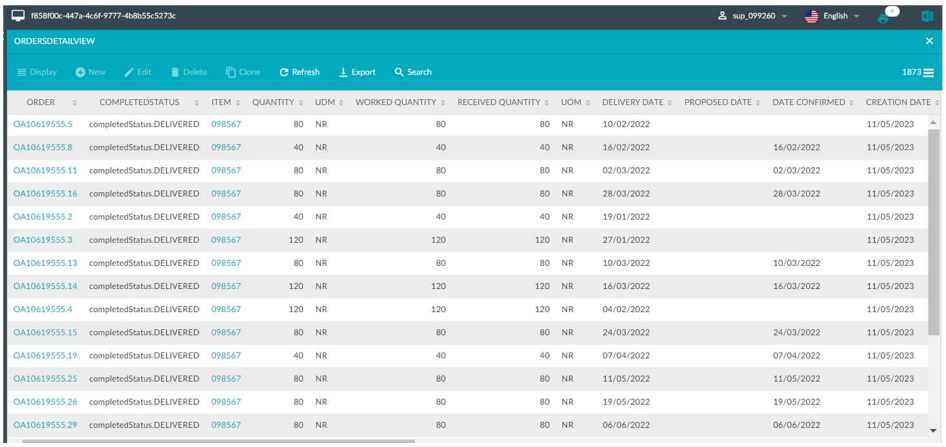
VIEWING ORDERS

To view the orders, proceed via Menu Resources → Orders.



The information is organized by order line and each one has all the necessary information including:

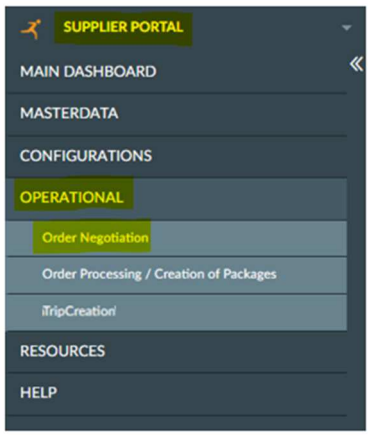
- Order line identifier
- Supplier
- Item required
- Quantity required
- Delivery date



ORDER	COMPLETEDSTATUS	ITEM	QUANTITY	UDM	WORKED QUANTITY	RECEIVED QUANTITY	UOM	DELIVERY DATE	PROPOSED DATE	DATE CONFIRMED	CREATION DATE
OA10619555.5	completedStatus.DELIVERED	098567	80	NR	80	80	NR	10/02/2022			11/05/2023
OA10619555.8	completedStatus.DELIVERED	098567	40	NR	40	40	NR	16/02/2022		16/02/2022	11/05/2023
OA10619555.11	completedStatus.DELIVERED	098567	80	NR	80	80	NR	02/03/2022		02/03/2022	11/05/2023
OA10619555.16	completedStatus.DELIVERED	098567	80	NR	80	80	NR	28/03/2022		28/03/2022	11/05/2023
OA10619555.2	completedStatus.DELIVERED	098567	40	NR	40	40	NR	19/01/2022			11/05/2023
OA10619555.3	completedStatus.DELIVERED	098567	120	NR	120	120	NR	27/01/2022			11/05/2023
OA10619555.13	completedStatus.DELIVERED	098567	80	NR	80	80	NR	10/03/2022		10/03/2022	11/05/2023
OA10619555.14	completedStatus.DELIVERED	098567	120	NR	120	120	NR	16/03/2022		16/03/2022	11/05/2023
OA10619555.4	completedStatus.DELIVERED	098567	120	NR	120	120	NR	04/02/2022			11/05/2023
OA10619555.15	completedStatus.DELIVERED	098567	80	NR	80	80	NR	24/03/2022		24/03/2022	11/05/2023
OA10619555.19	completedStatus.DELIVERED	098567	40	NR	40	40	NR	07/04/2022		07/04/2022	11/05/2023
OA10619555.25	completedStatus.DELIVERED	098567	80	NR	80	80	NR	11/05/2022		11/05/2022	11/05/2023
OA10619555.26	completedStatus.DELIVERED	098567	80	NR	80	80	NR	19/05/2022		19/05/2022	11/05/2023
OA10619555.29	completedStatus.DELIVERED	098567	80	NR	80	80	NR	06/06/2022		06/06/2022	11/05/2023

CONFIRM DELIVERY DATE

To confirm or propose a delivery date, proceed via Operational Menu → Order Negotiation.

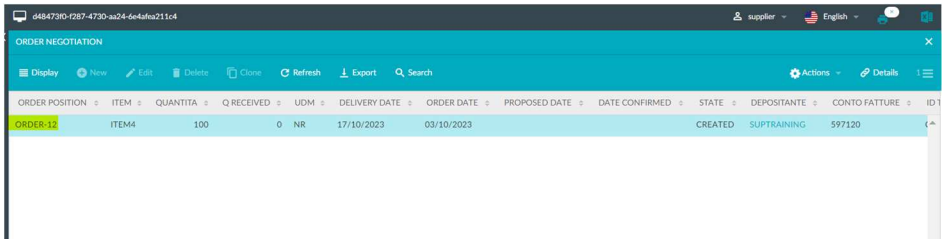


The system allows you to view the orders associated with each supplier and to select the operation you want to perform.

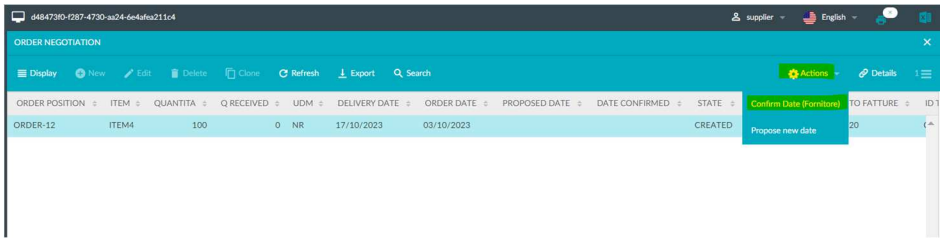
Confirm Original Date

The process involves:

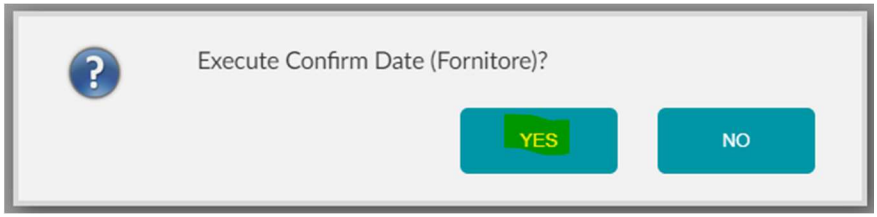
1. Click on the order line on which you want to perform the action.



2. Click on "Actions" and then on "Confirm Original Date".



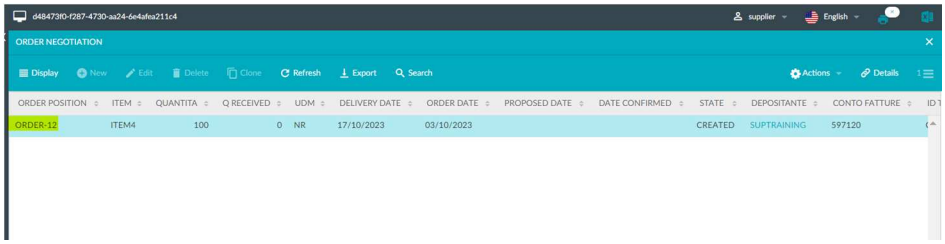
3. Click on “YES”.



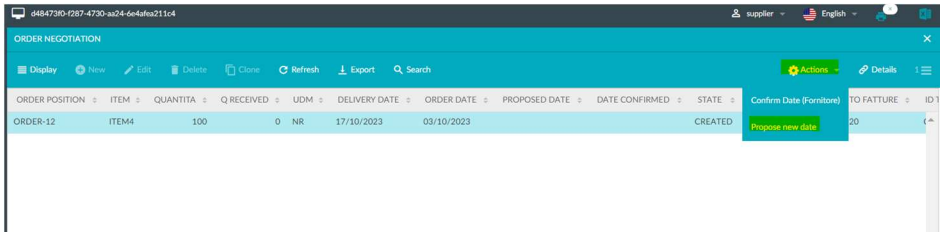
Propose a new date

The process involves:

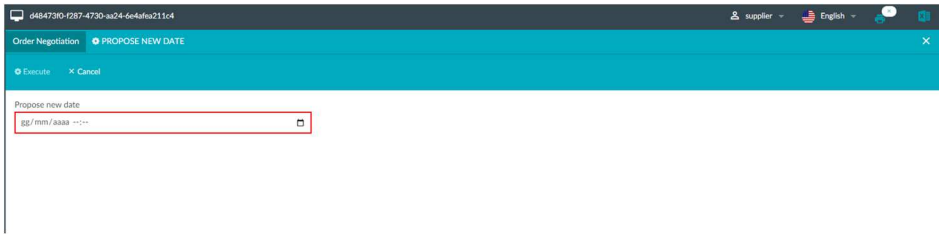
1. Click on the order line on which you want to perform the action.

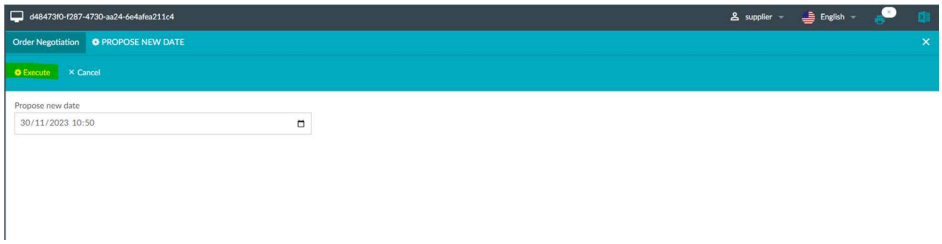


2. Click on “Actions” and then on “Propose new date”.



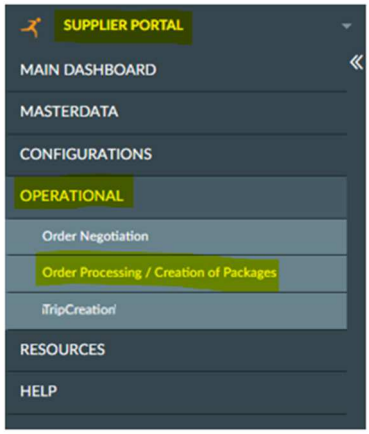
3. Enter the required parameters and click on “Execute”.





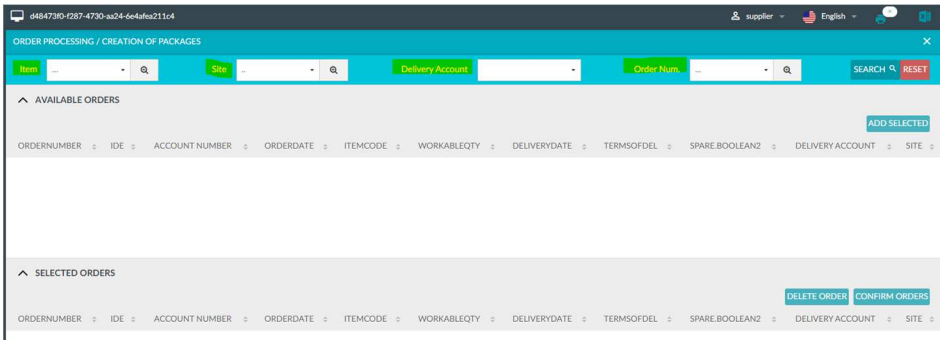
ORDERS PROCESSING AND PARCELS CREATION

The process phase described in the following paragraph has the objective of processing the orders received, create the relevant parcels and print their labels.
To carry out these operations, proceed via the Operational menu → Order Processing/Parcel Creation.

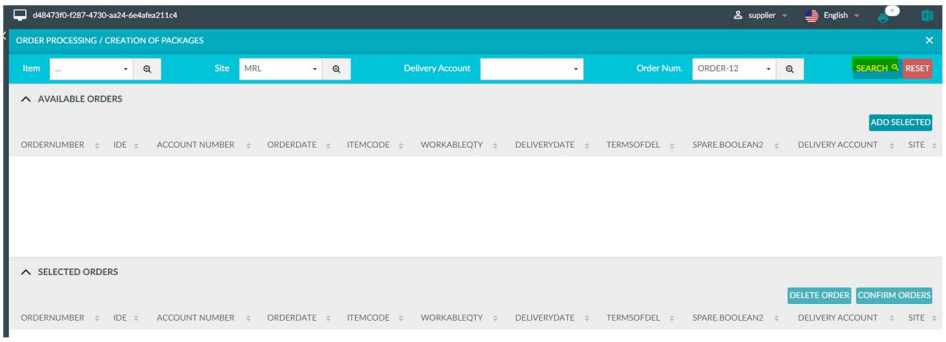


The process involves:

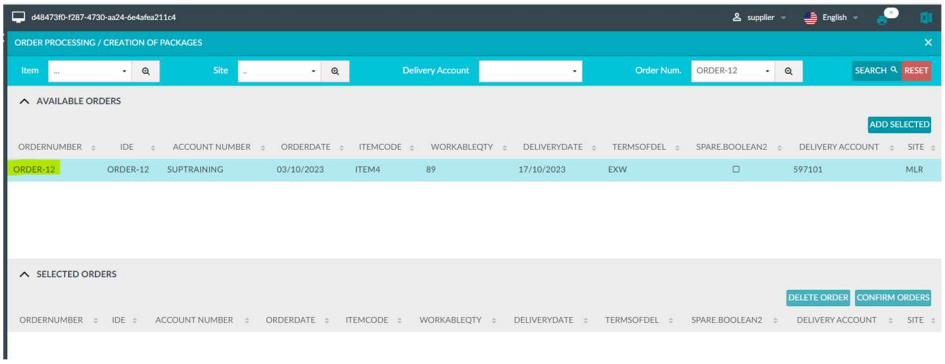
1. The user can filter the orders to be processed by article, site, consignee code and order line, using the text boxes at the top.



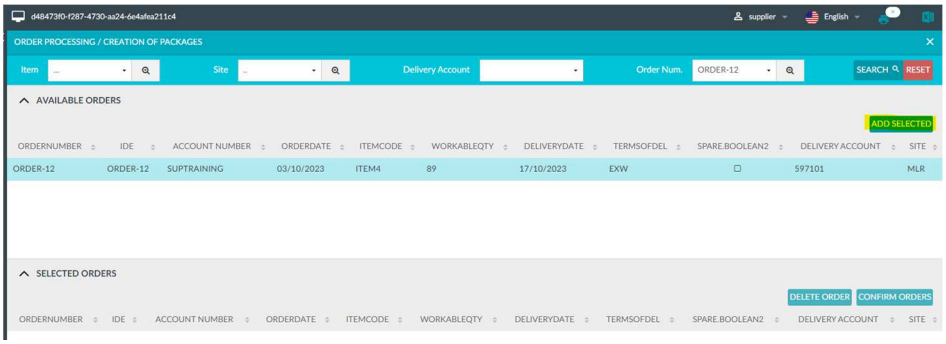
2. Once the filter has been entered, click on “Search” to display the available orders.



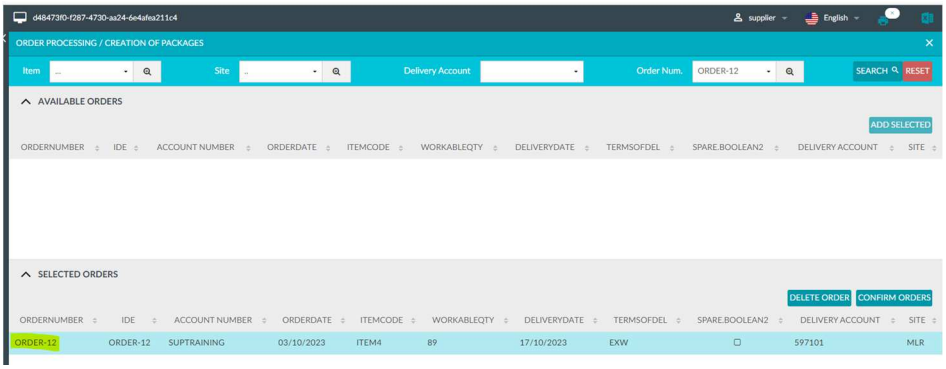
3. Select the order you wish to work on.



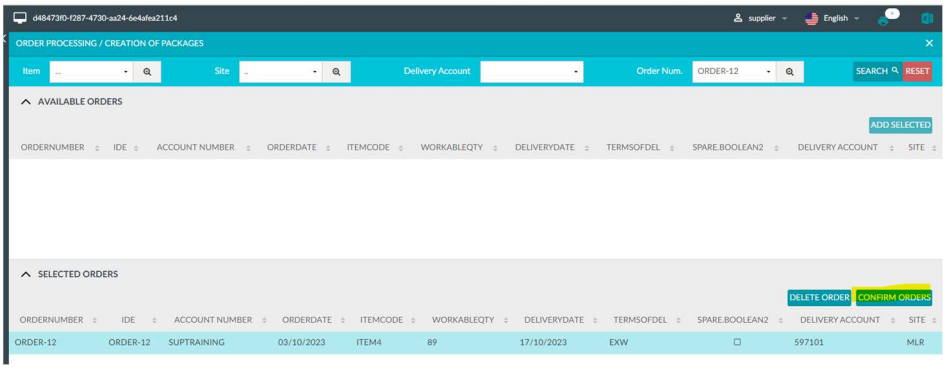
4. Click on "Add selected". (SEE WARNING 1 AT THE BOTTOM OF THE PAGE).



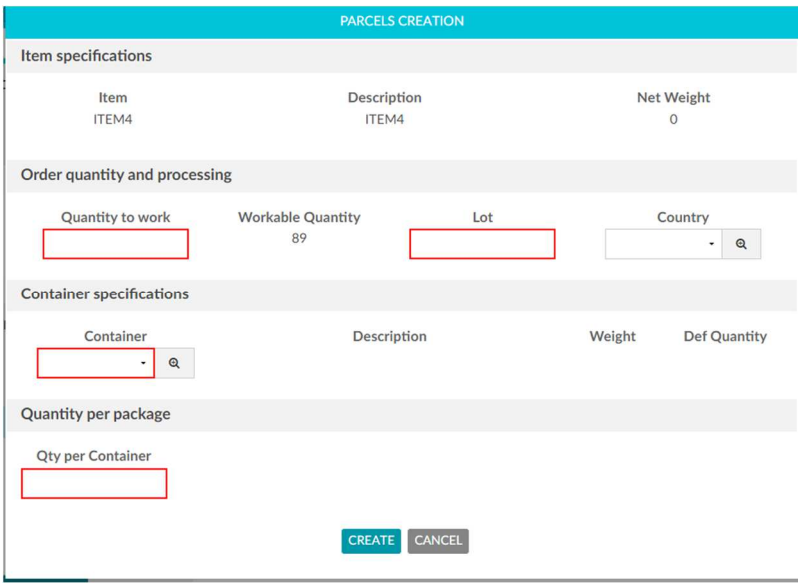
5. The selected order will be displayed in the section below.



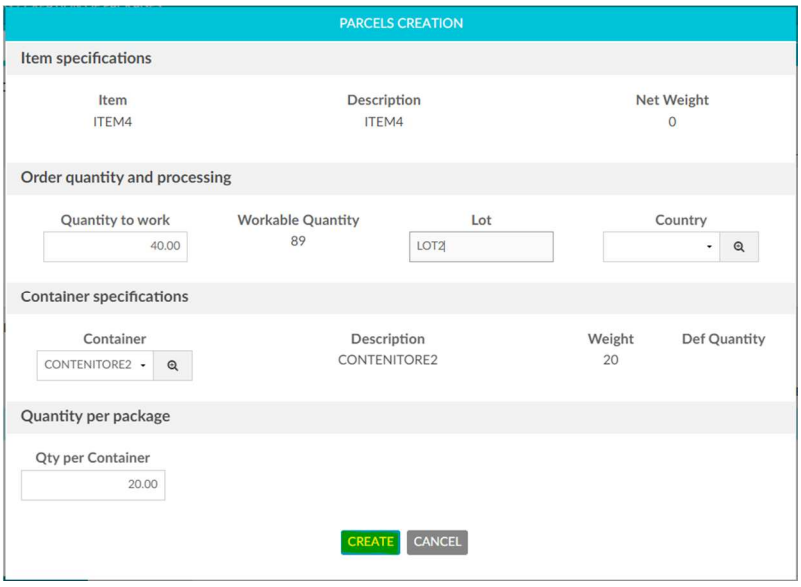
6. Click on "Confirm orders".



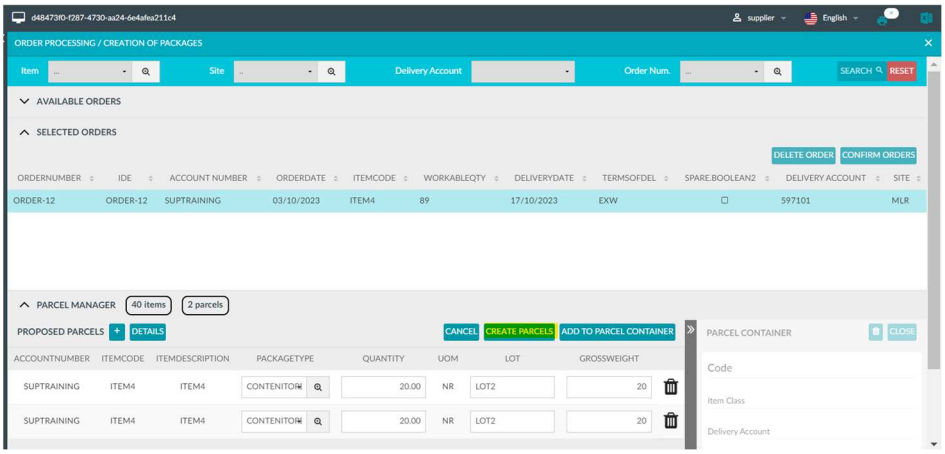
7. In the pop-up that appears, you can enter the required information. Mandatory info are highlighted in red (SEE WARNING 2 AT THE BOTTOM OF THE PAGE).



8. Click on “Create” to confirm the data and proceed with the creation of the parcels.



9. Using the "Create Parcels" button actually creates the parcels and generates the labels to be printed (SEE WARNING 3 AT THE BOTTOM OF PAGE).

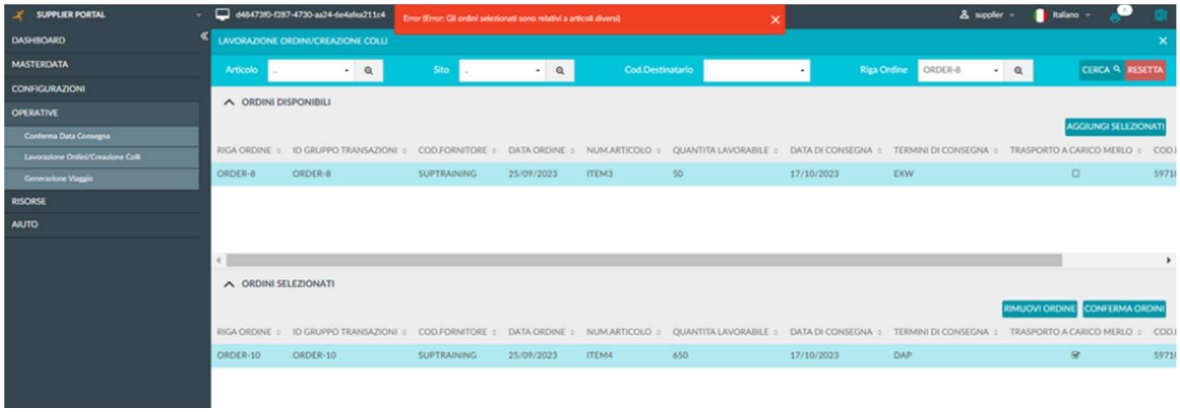


Warning 1

In the event that the user selects order rows referring to different:

- Items
- Account delivery
- Sites
- Delivery class
- Account number

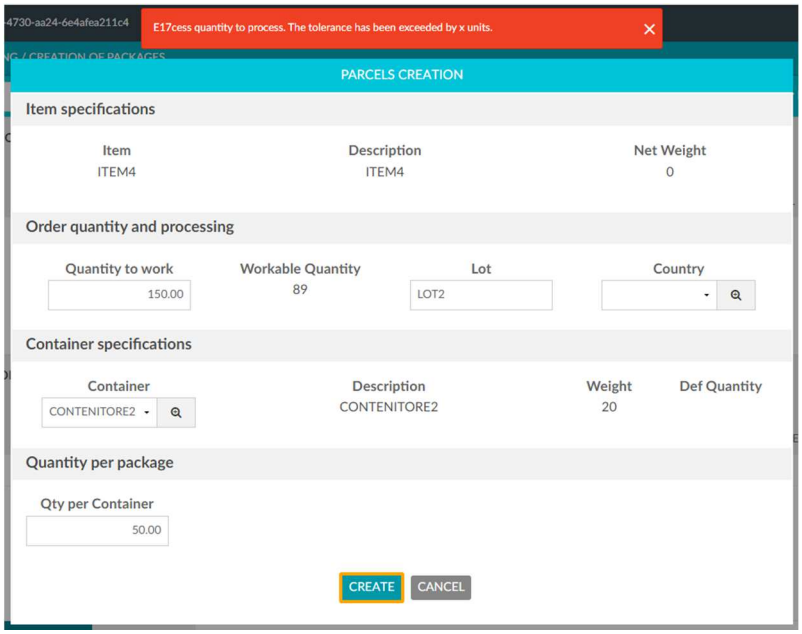
Order lines to be processed with delivery date too far from the current date.



If order lines with a more stringent delivery date are not selected for a particular article, the system will warn the user by displaying a non-blocking warning.

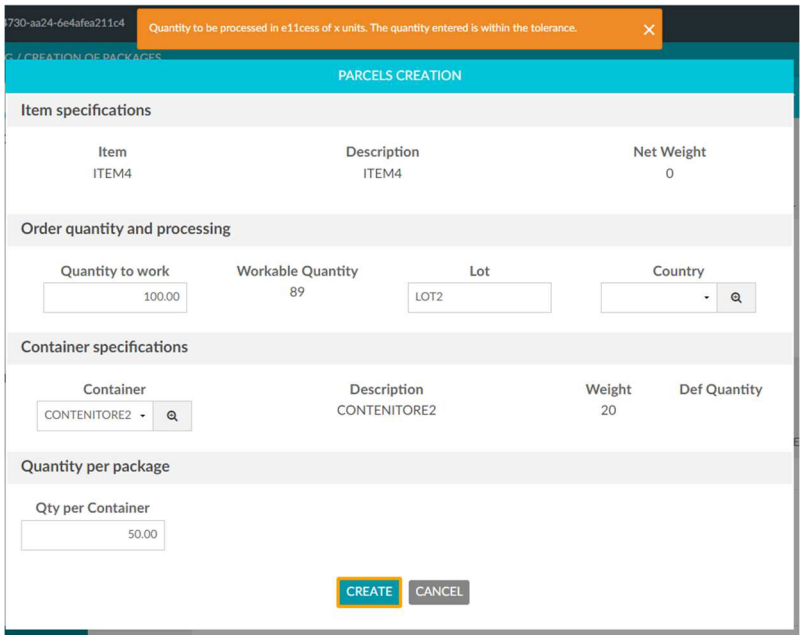
Warning 2

The system checks that the entered quantity (to be processed) does not exceed the requested quantity by also calculating the tolerance. The tolerance of each order line is rounded down to the next lower integer. If it is not respected, the system will stop the process by reporting the error to the user.



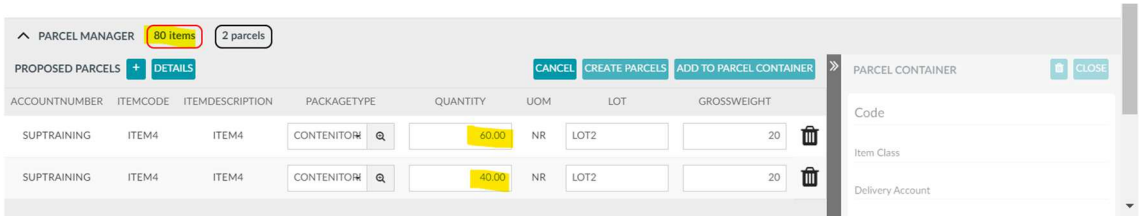
The system notifies the supplier if it has exceeded the requested quantity if it is in tolerance.
The tolerance of each order line is rounded down to the next lower integer.
If the entered quantity is within tolerance, the system signals this to the user with a non-blocking

warning.



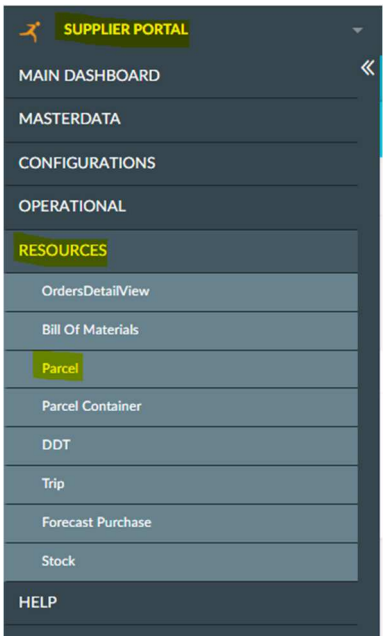
Warning 3

The system checks that the quantity entered does not exceed the quantity declared in the previous step. If this check is not respected, the system will not allow the confirmation of parcels.

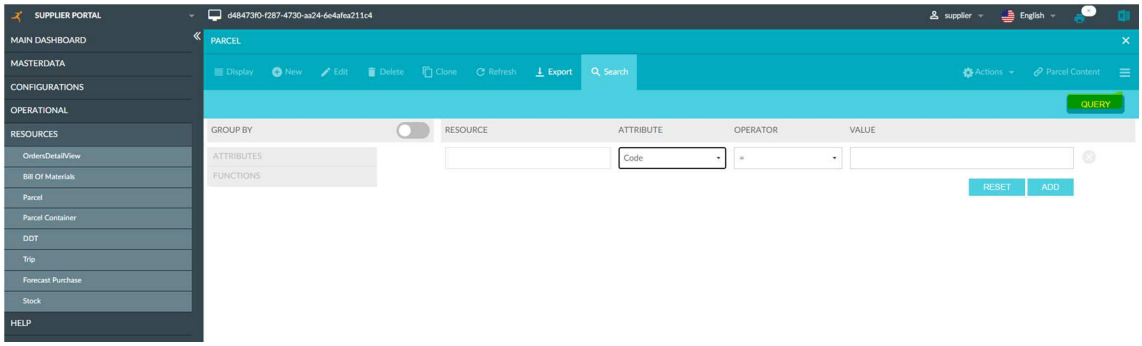


VIEWING PARCELS

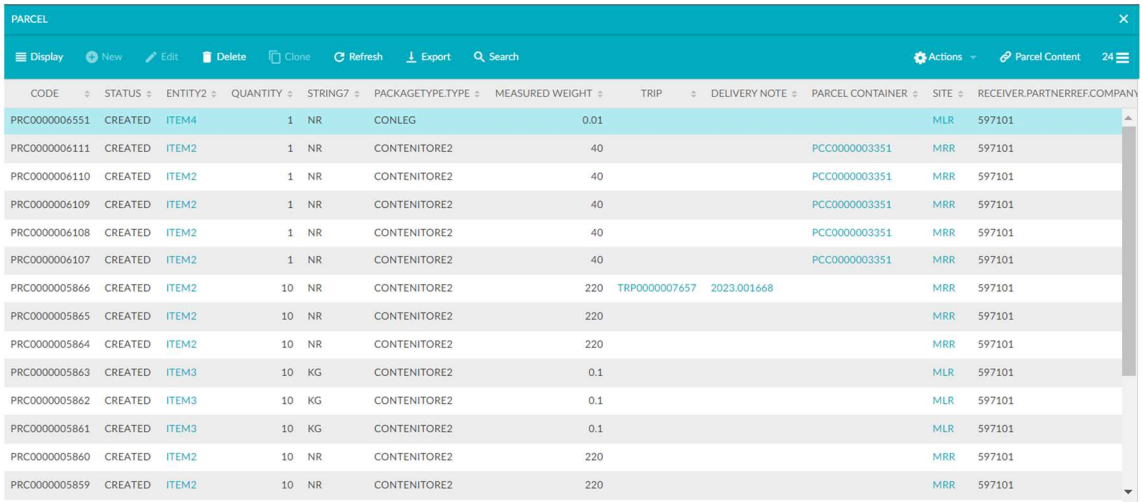
Once you have used the “Order processing/Parcels creation” operation, you can view and delete the parcels you have just created.
As soon as parcels are created, the corresponding labels are automatically generated.
To view the parcels from the Supplier Portal you will need to:
Go to Resources → Parcels



1. Set the filter type and press the “Search” button.



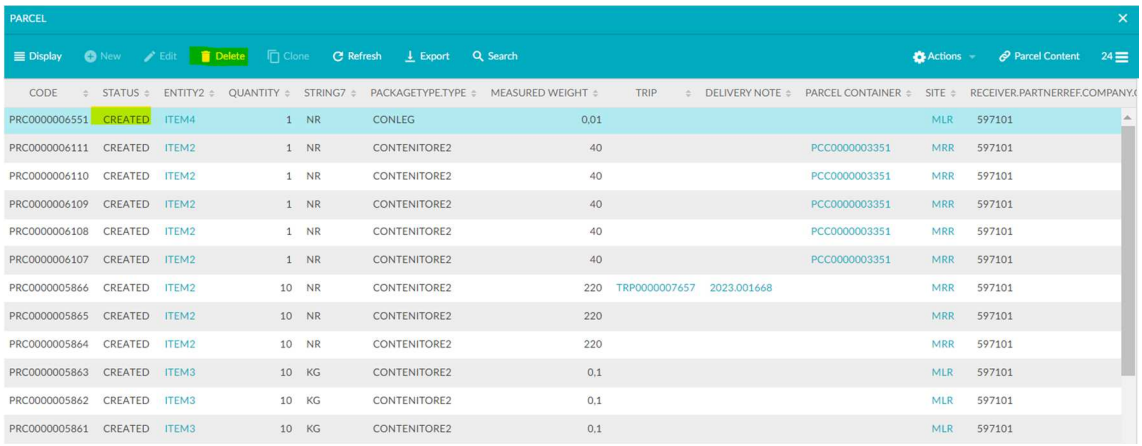
2. The parcels will then be visible.



CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	597101
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005860	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005859	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101

To delete parcels

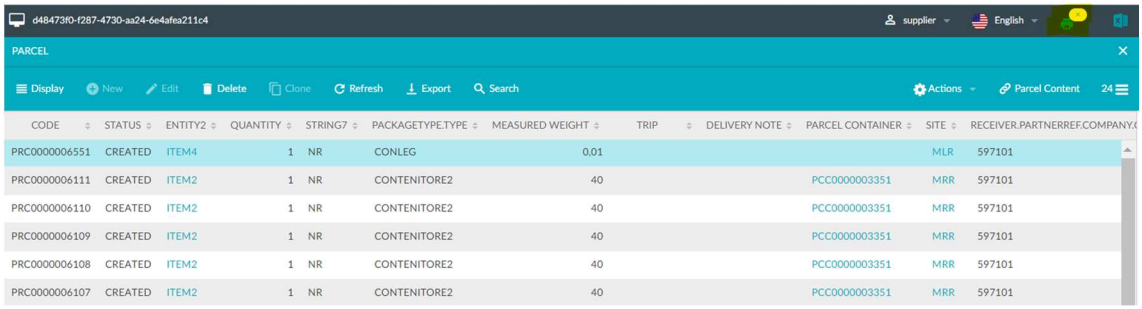
1. From the “Parcels” screen, after selecting the row to be deleted, it will be possible to delete parcels using the appropriate icon. The deletable parcels will only be those in “CREATED” status and not yet associated with any trip. Please note that the action of creating parcels is reversible while the trip creation action is not.



CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY.(
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0,01				MLR	597101
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101

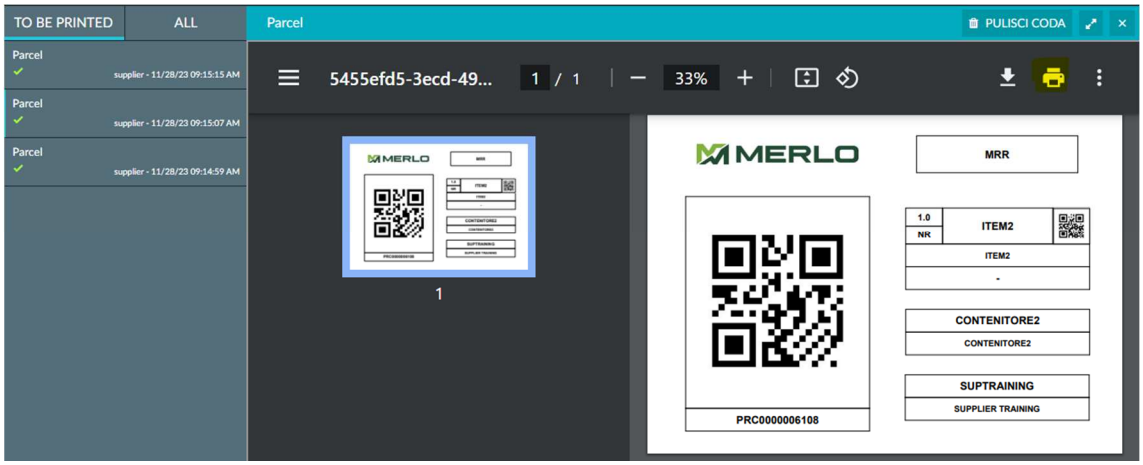
Labels will be generated at the same time as the parcels are created.

1. To display the labels, press on the printer icon:



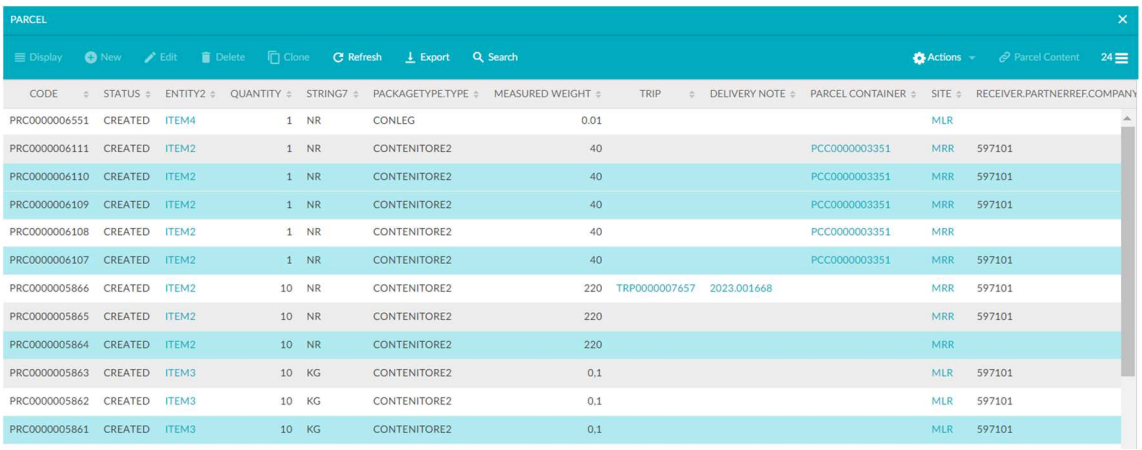
CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY.(
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0,01				MLR	597101
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101

2. The labels can then be printed via the print button.



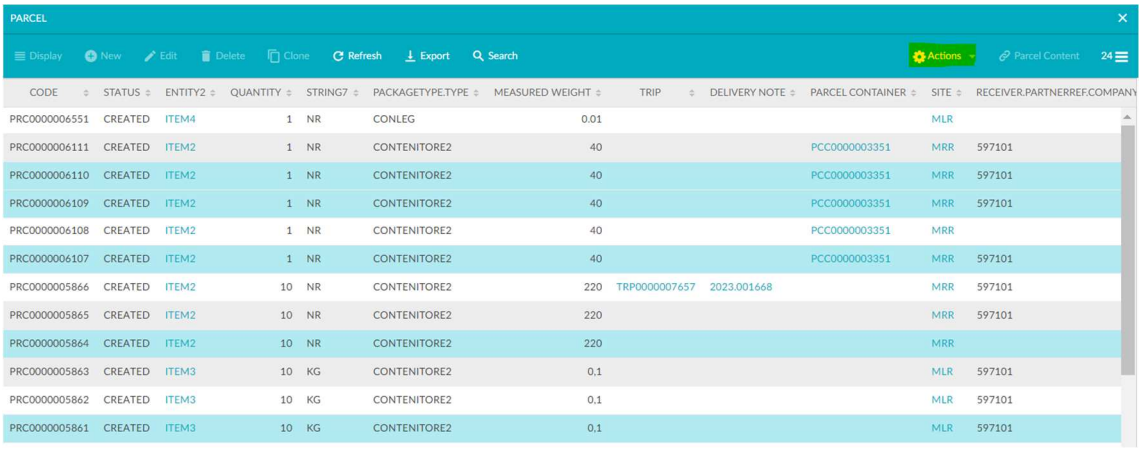
If you wish to print a single file with labels for several parcels, it will be necessary to

1. Make a multi-selection on the rows of the chosen parcels.



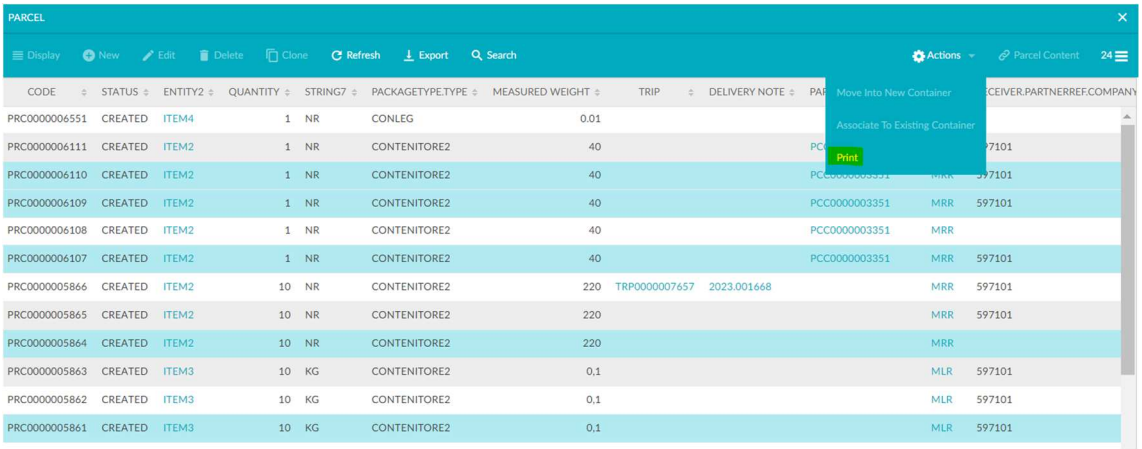
CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101

2. Press the “ACTIONS” button.



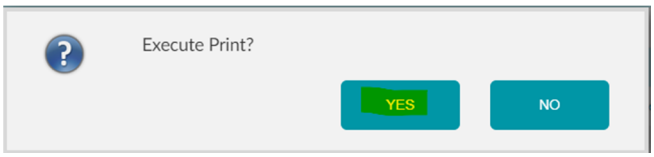
CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101

3. Press the “PRINT” key to print.



CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0,1				MLR	597101

4. Then press “YES” to confirm printing.



5. Printouts will be visible by pressing on the printer icon.

PARCEL CONTAINER CREATION

The process step of generating Parcel Container aims to create groupings of parcels forming a secondary packaging identified by a unique label.

Parcel Container can be generated at the same time as the parcels or at a later date.

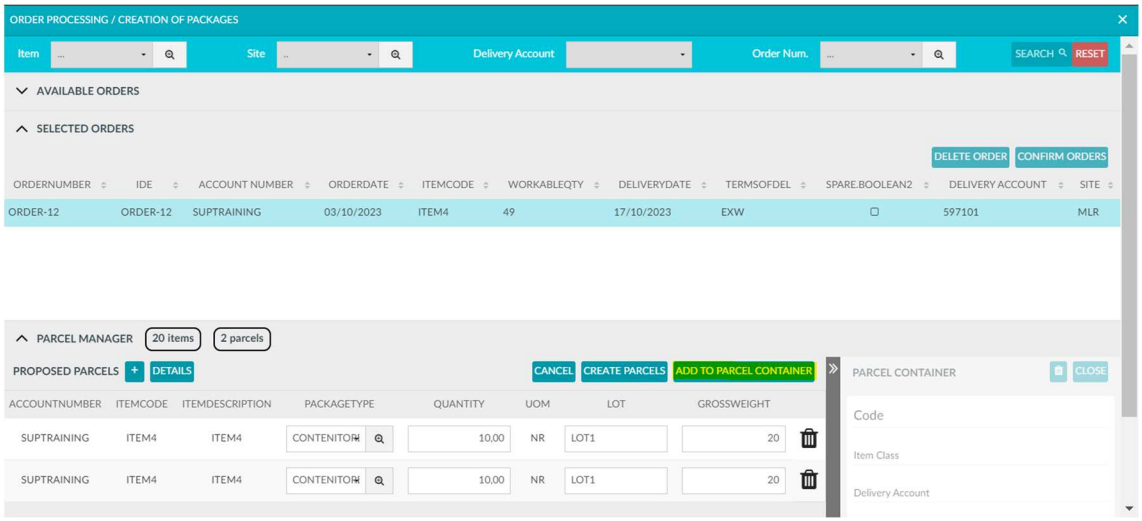
This activity is optional and can be performed using either the web interface or the mobile app.

WEB

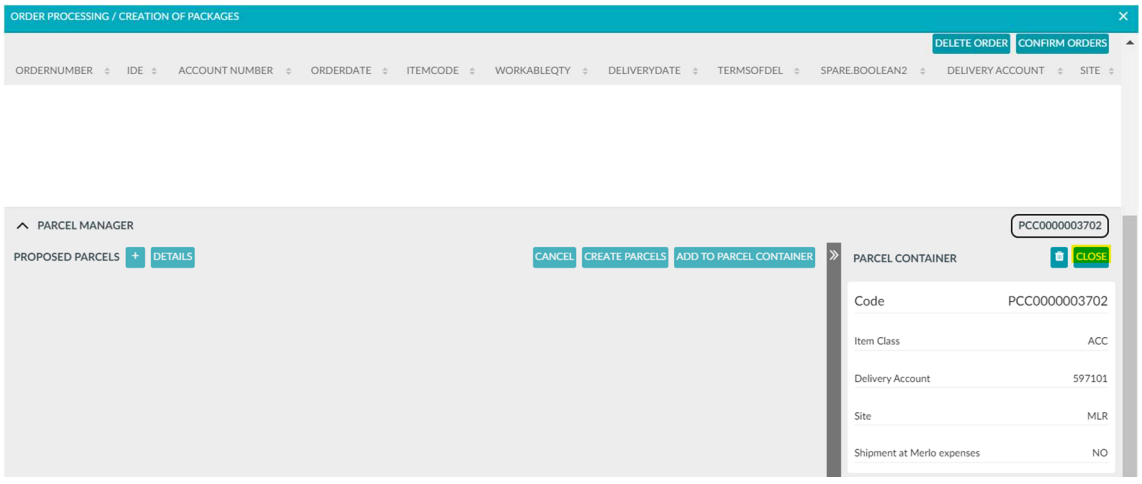
Parcel Container generated at the same time as parcels creation

If Parcel Container were generated at the same time as the creation of parcels, the process involves:

1. Click on "Add to Parcel Container" (if not yet created the Parcel Container will be generated, alternatively the parcels will be added to the the visible Parcel Container on the right).
   (SEE WARNING 1 AT THE BOTTOM OF THE PAGE)

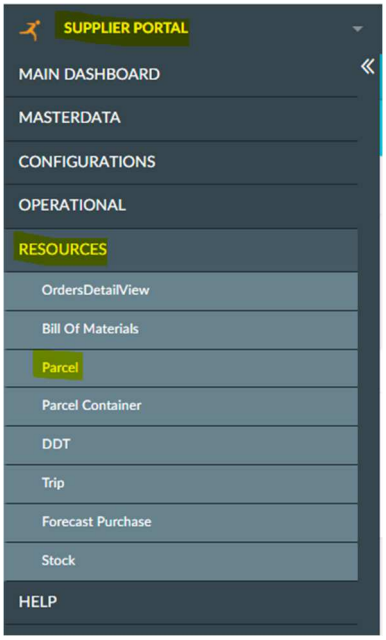


2. Click on “Close” to close the Parcel Container and print the label.



Parcel Container generated later on

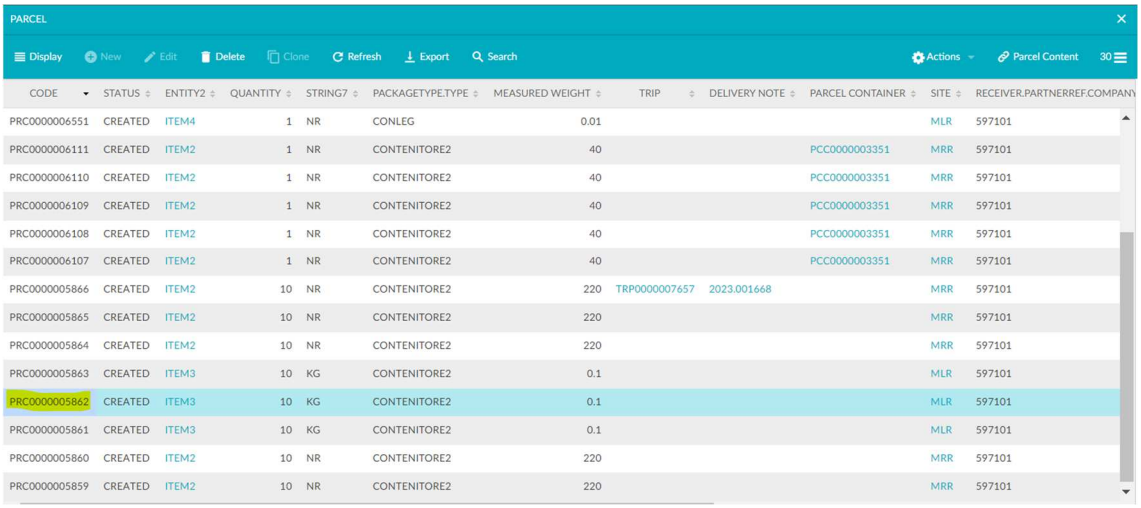
If Parcel Container are created at a later point in time, proceed via the menu Resources → Parcels.



New Parcel Container

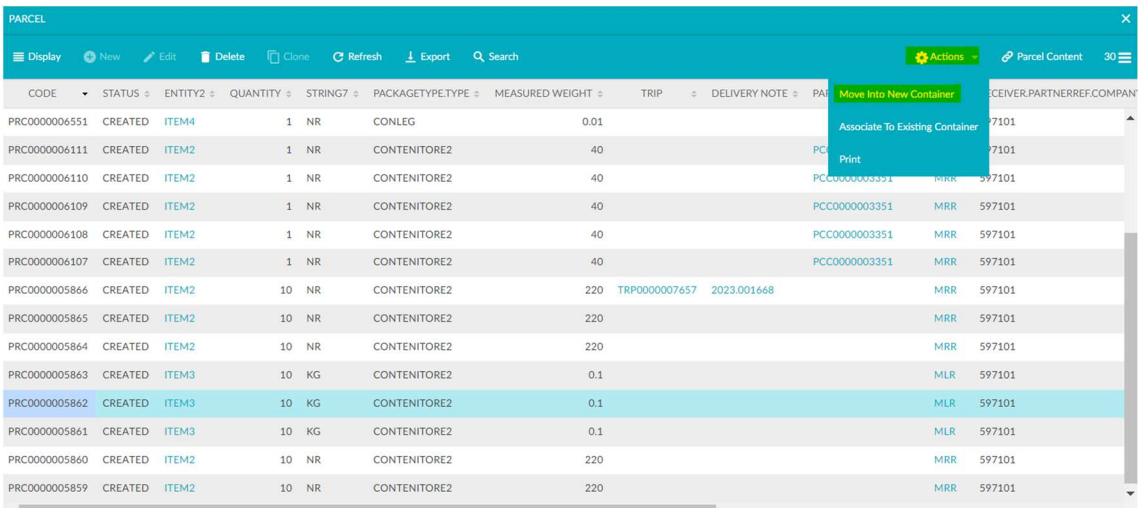
For insertion into a new Parcel Container, the process involves:

1. Select the parcels to be inserted into a new Parcel Container.

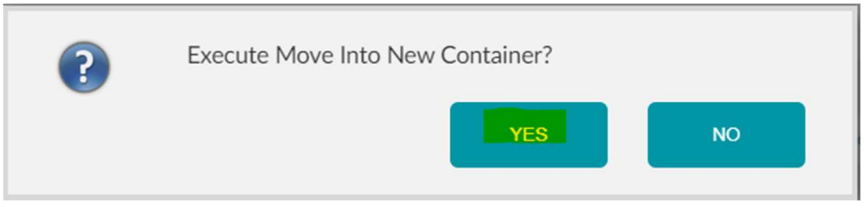


CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	597101
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005860	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005859	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101

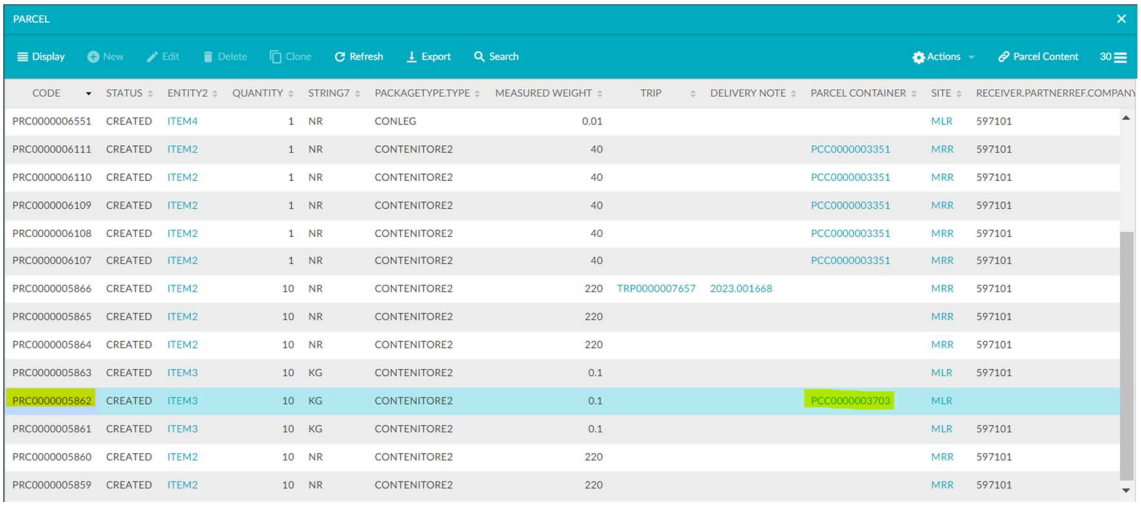
2. Click on “Actions” and then on “Move into new Container”.



3. Click on "YES".



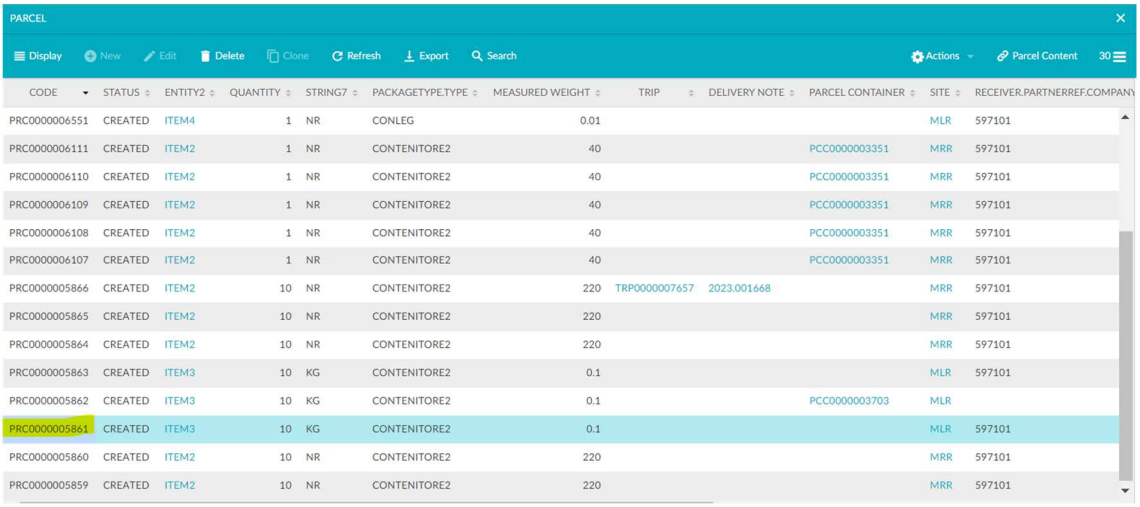
You can view the newly created Parcel Container associated with the previously selected parcel.



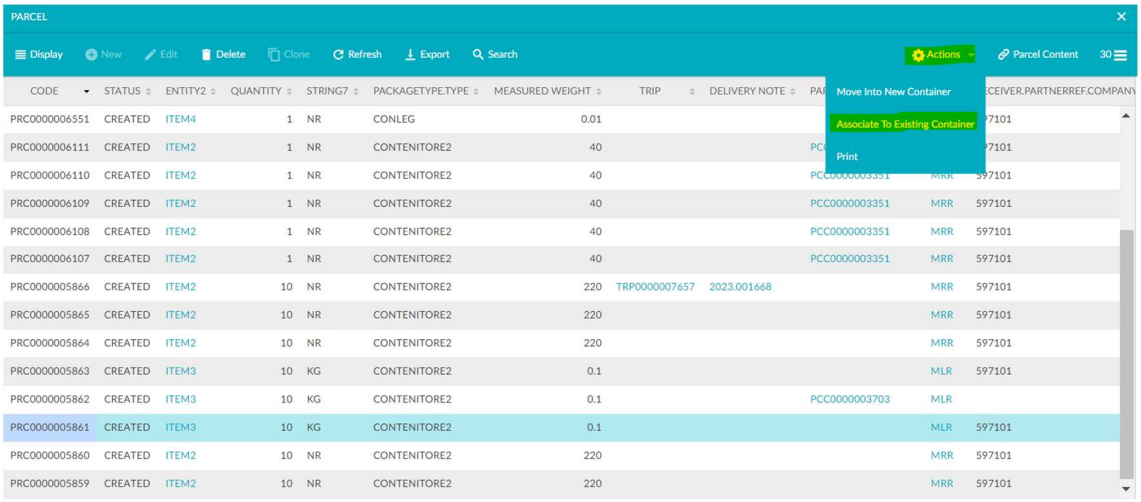
Existing Parcel Container

For insertion into an existing Parcel Container, the process involves:

1. Select the parcels to be inserted into a new Parcel Container.

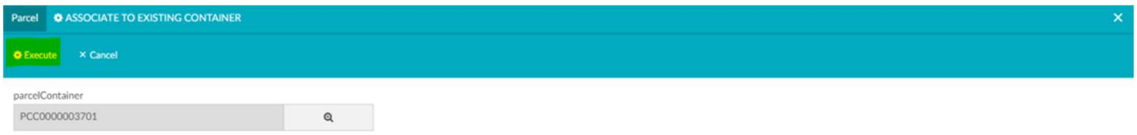


2. Click on “Actions” and then on “Associate to Existing Container”.

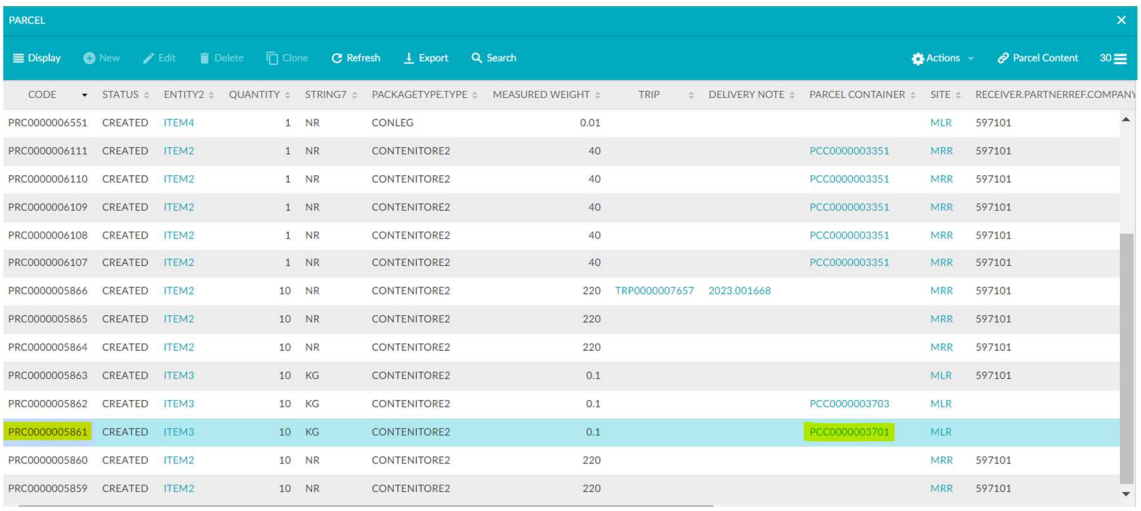


3. Select existing Parcel Container.

4. Click on "Execute". (SEE WARNING 2 AT THE BOTTOM OF THE PAGE)



It is possible to view the existing Parcel Container associated with the previously selected parcel.



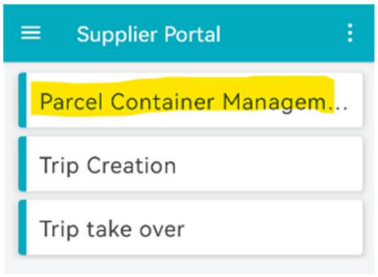
CODE	STATUS	ENTITY2	QUANTITY	STRING7	PACKAGETYPE.TYPE	MEASURED WEIGHT	TRIP	DELIVERY NOTE	PARCEL CONTAINER	SITE	RECEIVER.PARTNERREF.COMPANY
PRC0000006551	CREATED	ITEM4	1	NR	CONLEG	0.01				MLR	597101
PRC0000006111	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006110	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006109	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006108	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000006107	CREATED	ITEM2	1	NR	CONTENITORE2	40			PCC0000003351	MRR	597101
PRC0000005866	CREATED	ITEM2	10	NR	CONTENITORE2	220	TRP0000007657	2023.001668		MRR	597101
PRC0000005865	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005864	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005863	CREATED	ITEM3	10	KG	CONTENITORE2	0.1				MLR	597101
PRC0000005862	CREATED	ITEM3	10	KG	CONTENITORE2	0.1			PCC0000003703	MLR	
PRC0000005861	CREATED	ITEM3	10	KG	CONTENITORE2	0.1			PCC0000003701	MLR	
PRC0000005860	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101
PRC0000005859	CREATED	ITEM2	10	NR	CONTENITORE2	220				MRR	597101

MOBILE

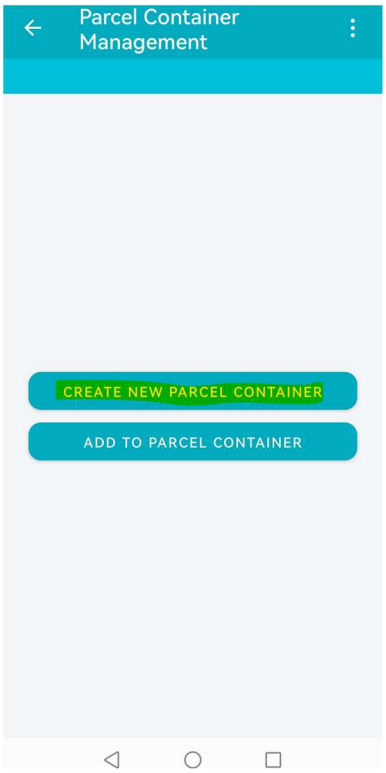
New Parcel Container

For the creation of a new Parcel Container, the process involves:

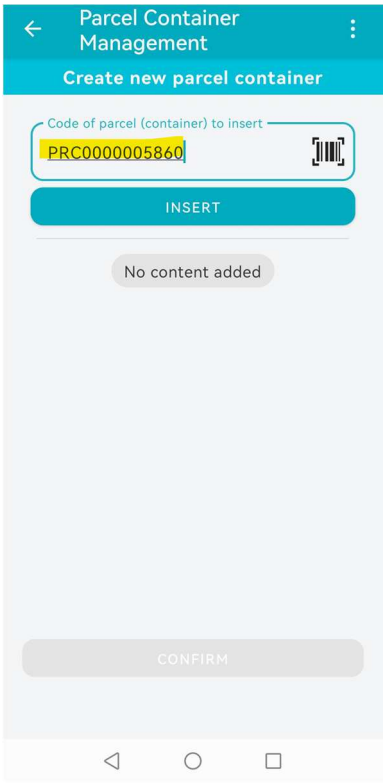
1. Click on "Parcel Container Management".



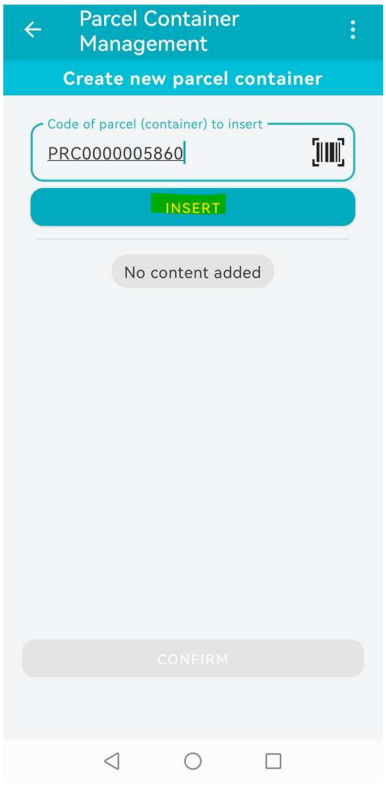
2. Click on "Create new Parcel Container".



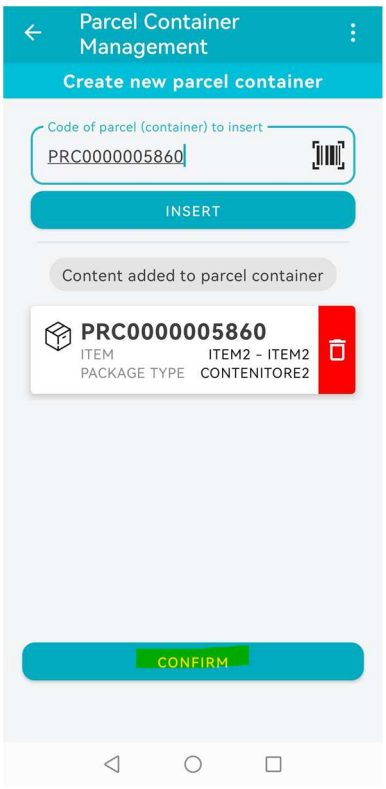
3. Enter the code of the parcel/ Parcel Container. (SEE WARNING 1 AT BOTTOM OF PAGE)



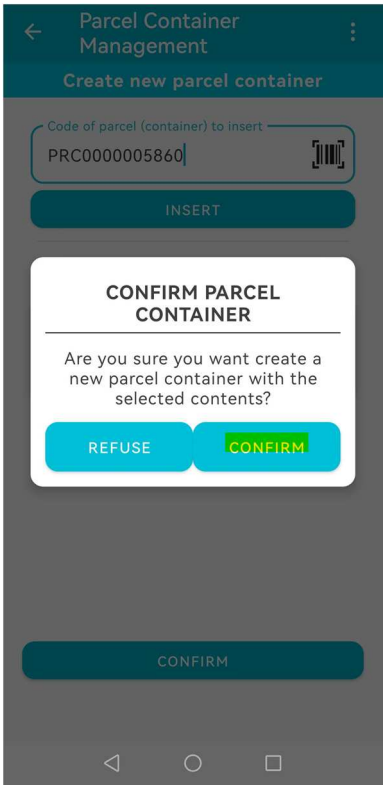
4. Click on “Insert”.



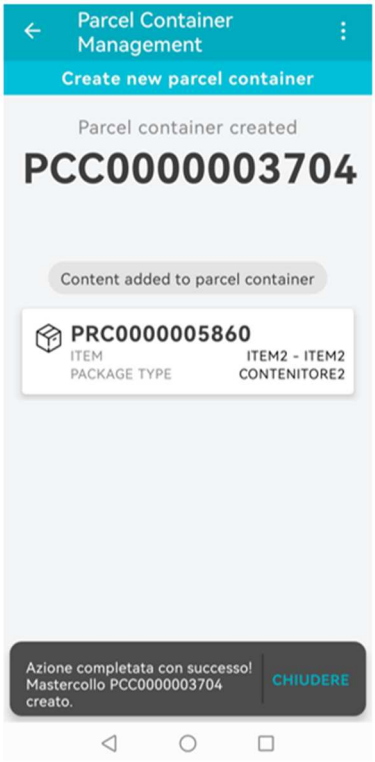
5. Once the content has been added, click on “Confirm”.



6. Click on "Confirm" to conclude the operation.



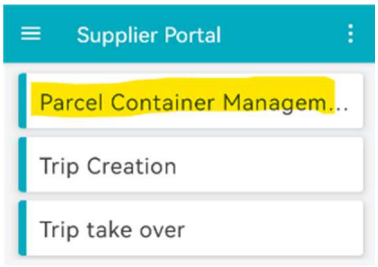
7. Parcel Container successfully created.



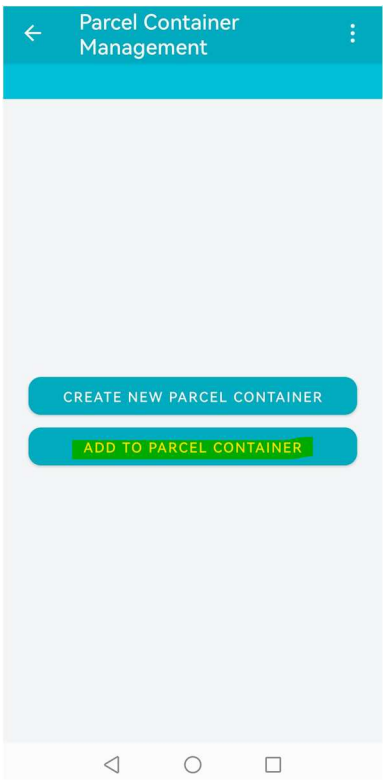
Existing Parcel Container

For insertion into an existing Parcel Container, the process involves:

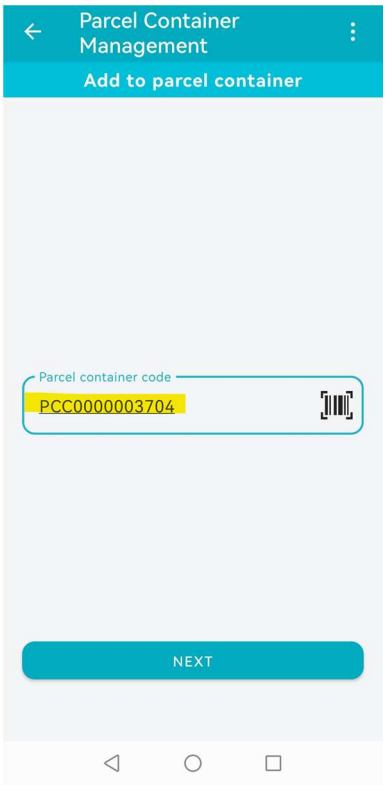
1. Click on "Parcel Container Management".



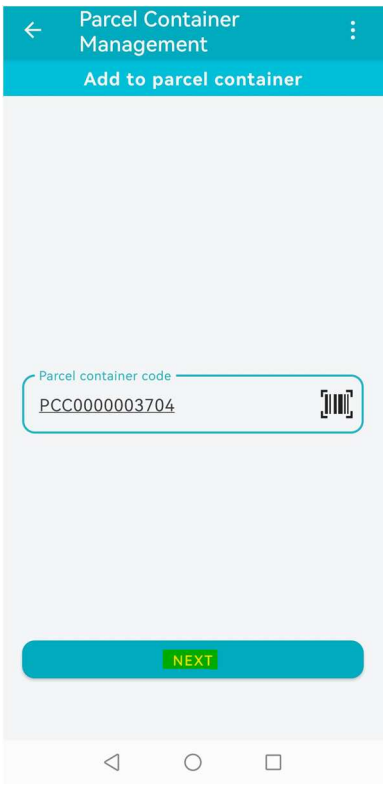
2. Click on “Add to existing Parcel Container”.



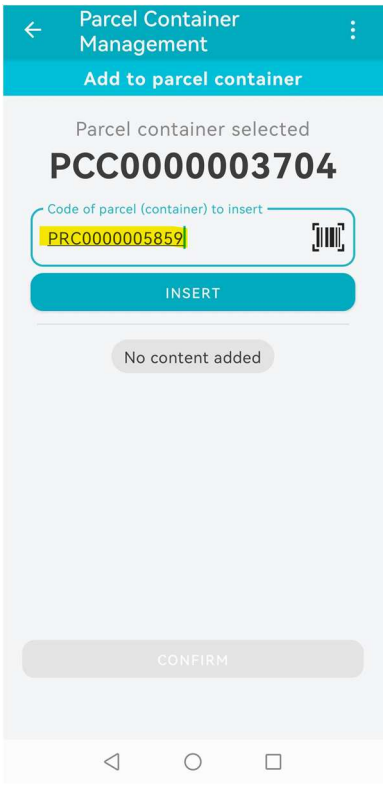
3. Enter the code of the existing Parcel Container.



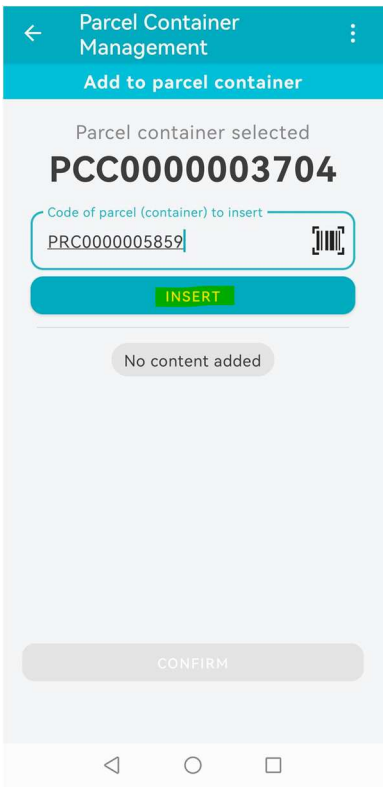
4. Click on "Next".



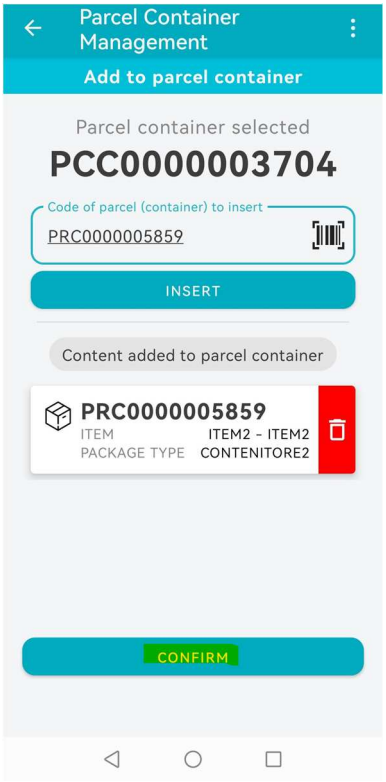
5. Following selection of the Parcel Container, enter the parcel/Parcel Container code.



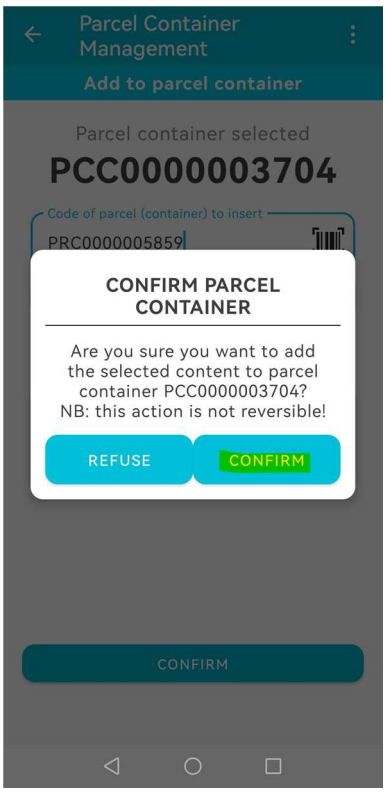
6. Click on “Insert”. (SEE WARNING 2 AT BOTTOM OF PAGE)



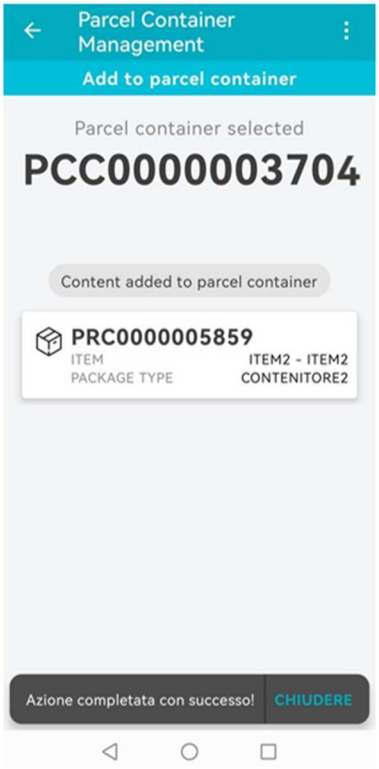
7. Once the content has been added, click on “Confirm”.



8. Click on “Confirm” to conclude the operations.



9. Action completed successfully.



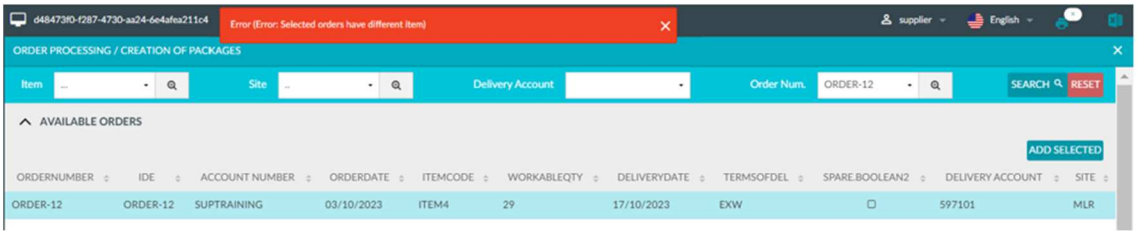
Warning 1

Following the creation of a Parcel Container, if the user selects order rows referring to different:

- Delivery sites (MRR\MRL)
- Account delivery
- Delivery class

- Account number
- Item class
- Order lines to be processed with delivery date too far away from date

the system blocks the process by reporting the error to the user (compared to the previously entered parcels in the Parcel Container).

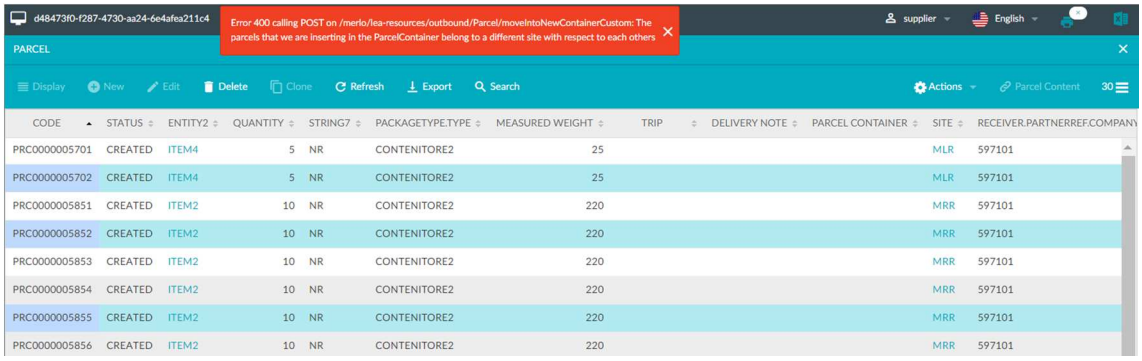


Warning 2

In the event that the user selects packages referring to different:

- Account number
- Sites
- Account delivery
- Delivery account
- Delivery class
- Item class
- Packages that cannot be included in a Parcel Container

the system blocks the process by reporting the error to the user.



CREATION OF TRIPS AND DDT

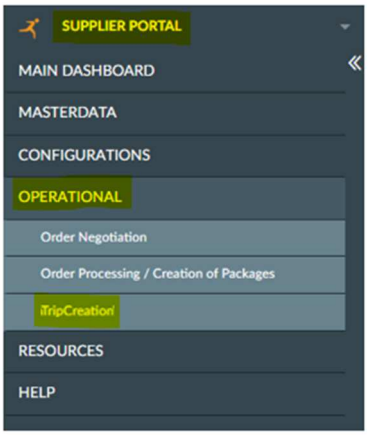
This process step deals with the grouping of parcels and Parcel Container in order to define the goods to be shipped to Merlo. This process also allows the DN to be generated and subsequently printed/certified.

The composition of trips can vary until the trip is in a CLOSED state, the events that bring a trip to a closed state are as follows:

- Taking over a trip
- Self-assignment of a trip by a Supplier

This process step can be performed either from the web or from mobile, except for the printing/certification of the DDT which is to be performed from web.

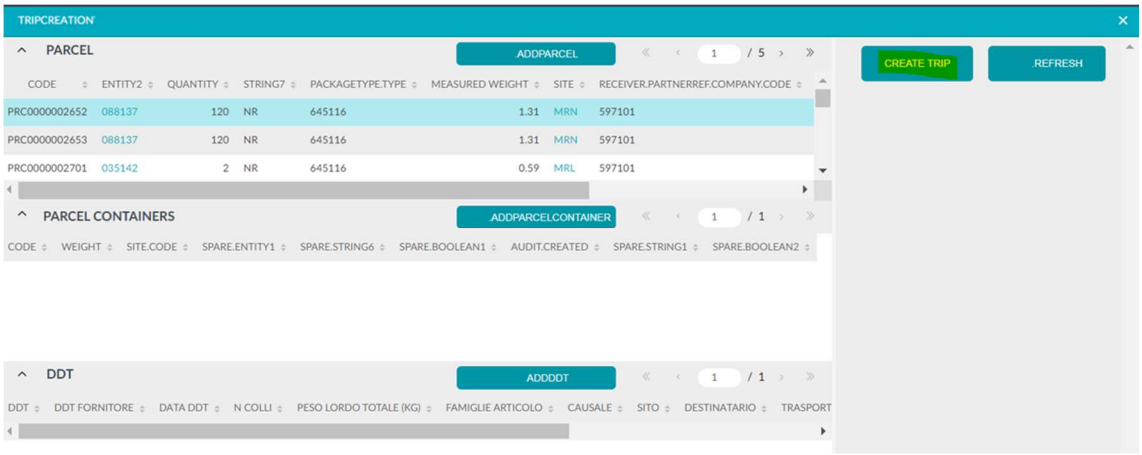
To carry out these operations, proceed via the Operations menu → Trip Generation.



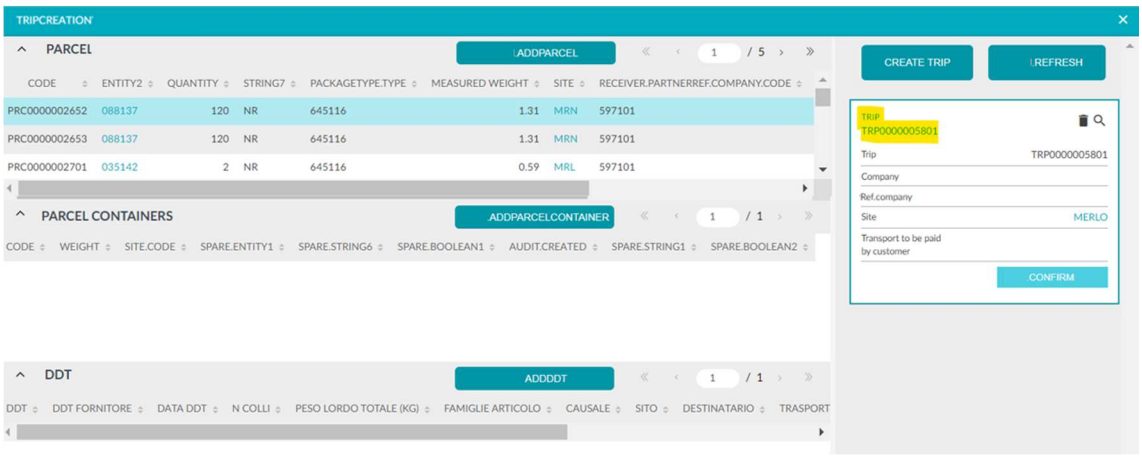
WEB

The process involves:

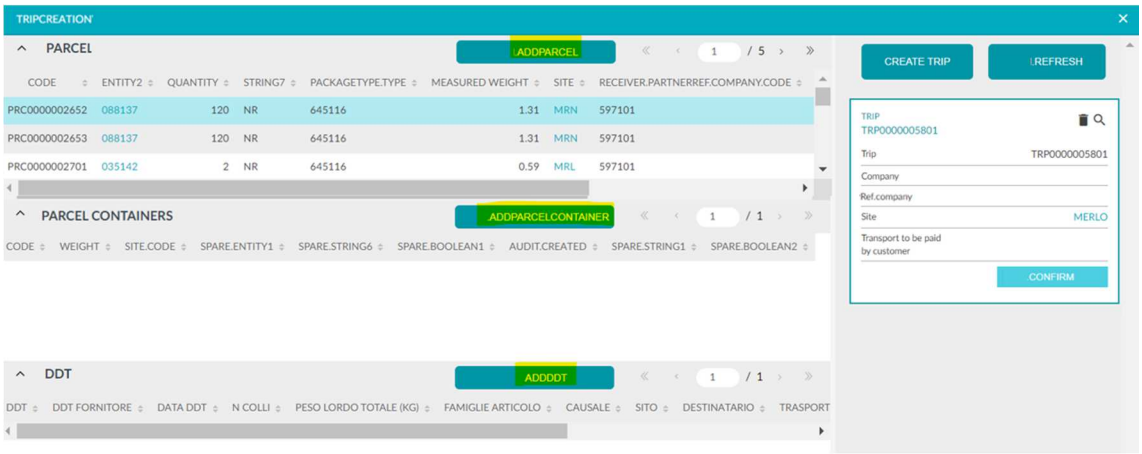
1. Click on the "Create Trip" button to generate a new trip (SEE WARNING 1 AT BOTTOM OF PAGE).



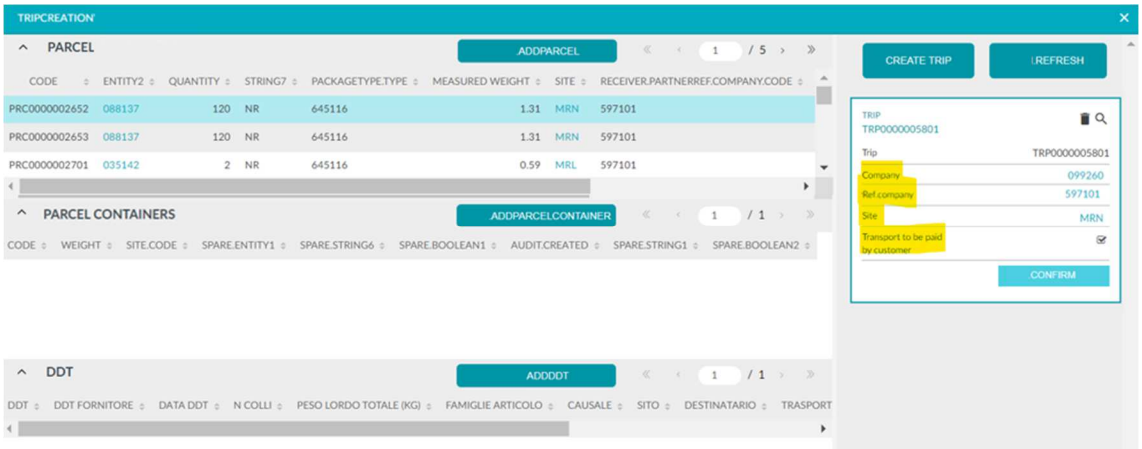
2. The newly created trip will be displayed on the right.



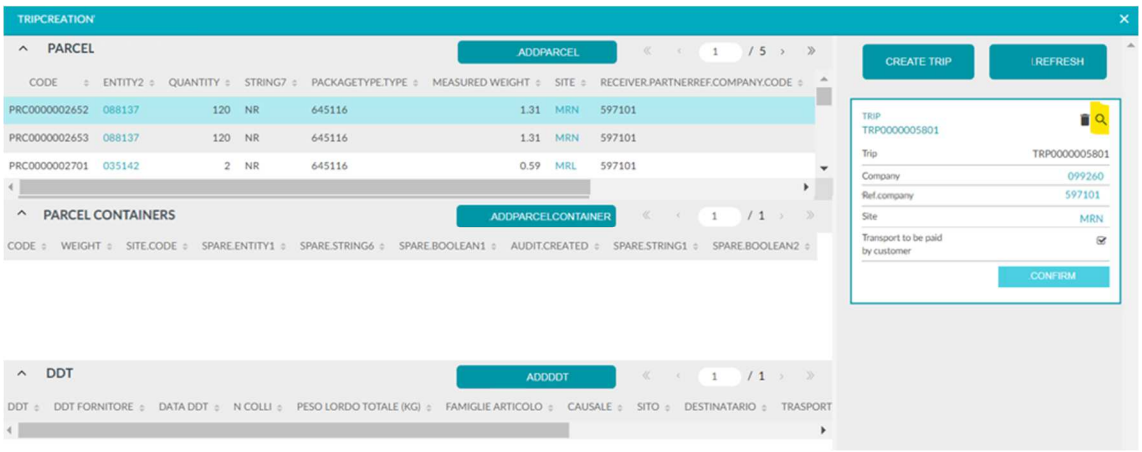
3. Select the parcels/Parcel Container/DN that you want to include in the trip to define its composition. (SEE WARNING 2 AT THE BOTTOM OF THE PAGE)



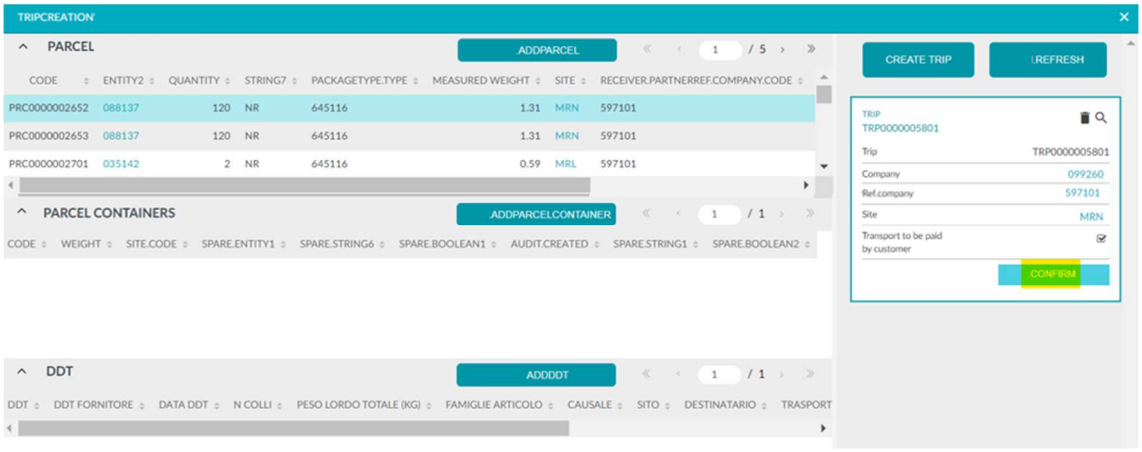
4. The trip will be populated with the Supplier, Consignee Code and Site information. In addition, if the transport will be paid for by Merlo, the corresponding flag will be displayed.



5. Click on the magnifying glass to check the composition of the trip and, if necessary, remove the inserted parcels/Parcel Container/DN.



6. Click on "Confirm" to validate the trip.



7. In the pop-up that appears, it is possible to enter some mandatory parameters for the creation of the trip and its BOM. The user must declare:

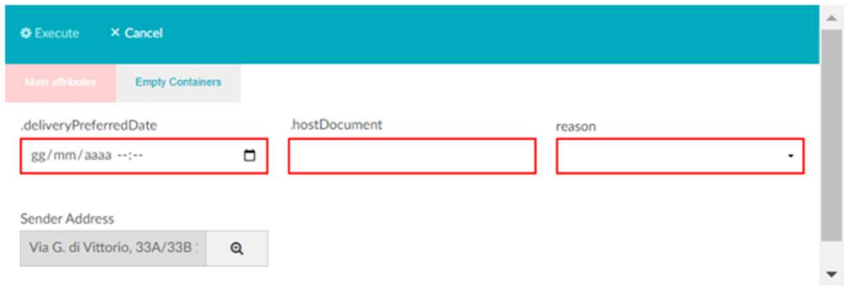
    a. Preferred delivery date: the day by which the supplier would like the goods to arrive at the destination site.

    b. DN Supplier Code: code of the DN issued by the supplier on his management system.

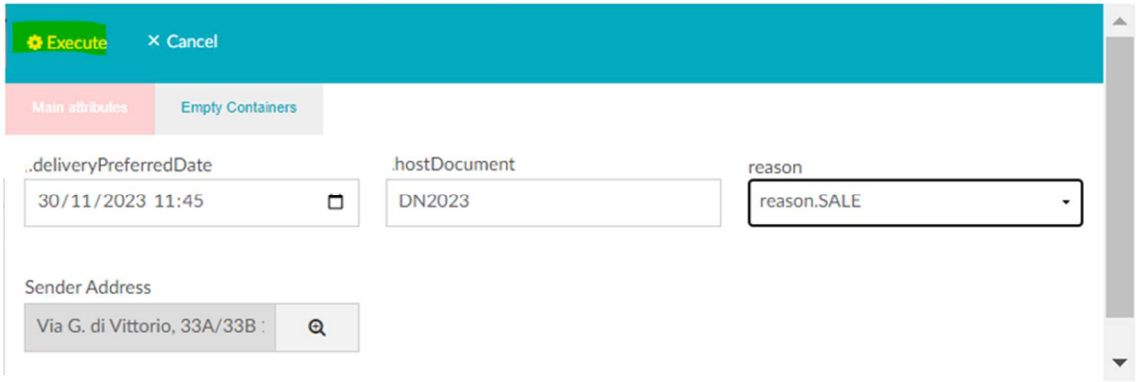
    c. Reason: it is possible to choose between three alternatives, such as Sale, Working Account and Deposit Account.

    d. Address: address from which the goods are dispatched. The supplier may therefore choose from the addresses linked to his Account

    e. Number (viewable in Masterdata → Suppliers → Supplier Addresses). If there is only one Account NumberAddress association, the field is filled in by default.

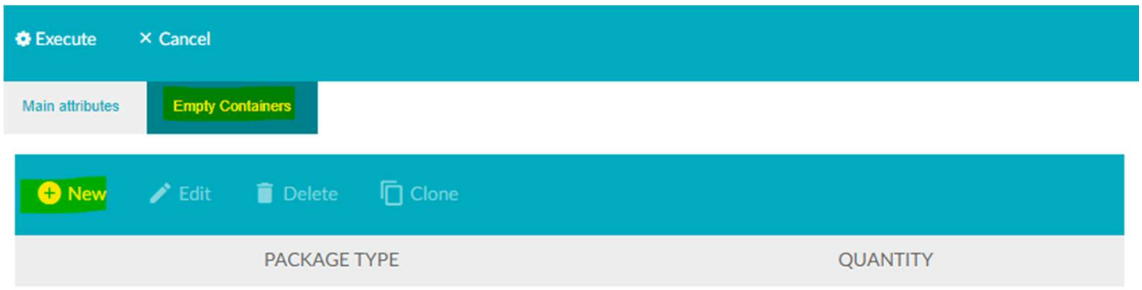


8. Click on "Execute" to generate the trip and the corresponding delivery note.



The supplier may express a willingness to take back empty containers, indicating the type of container and the quantities to be taken back at the plant. In this case, the process involves:

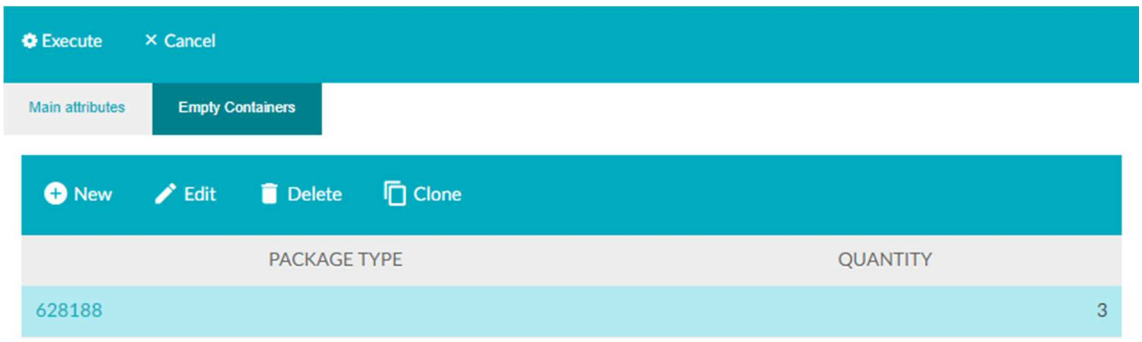
1. After step (7) described above, click on "Empty Containers" and then "New".



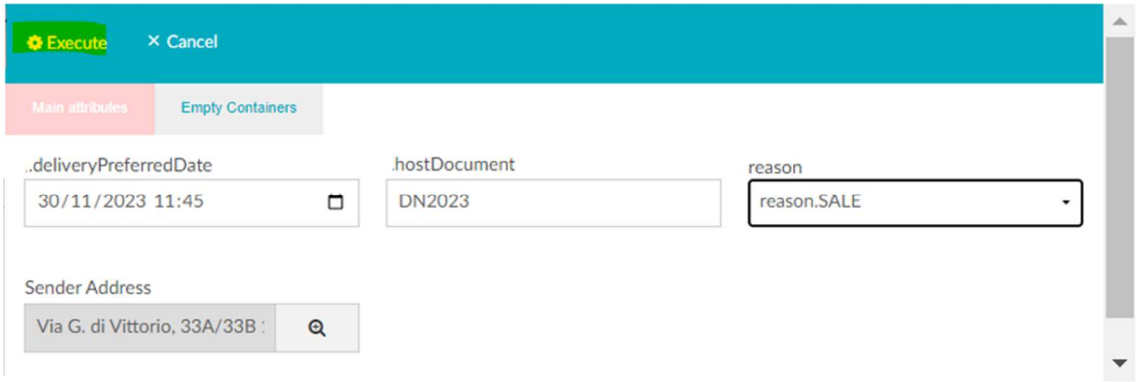
2. The mandatory information to be entered will be displayed.

3. After entering the information, click on "Save".

4. A screen will appear summarizing the information, which can be edited or deleted. It will be possible to enter more than one empty containers.

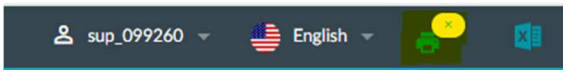


5. Click on "Execute" to generate the trip and the associated BOM.



By means of a "Print" action, it will be possible to produce the BOM in PDF format and print/download it locally. The supplier will certify the waybill in taking charge by affixing an appropriate signature (company name + date + user). The DN will be certified at the end of the journey.

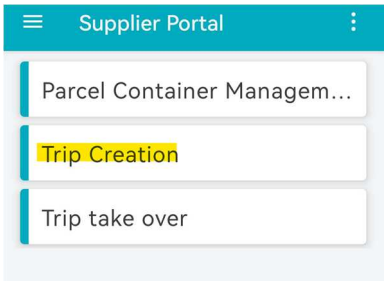
DN can be re-downloaded/printed at any time.



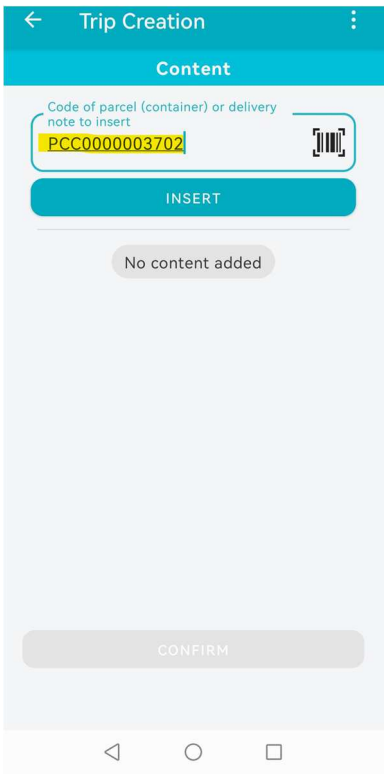
MOBILE

The process involves:

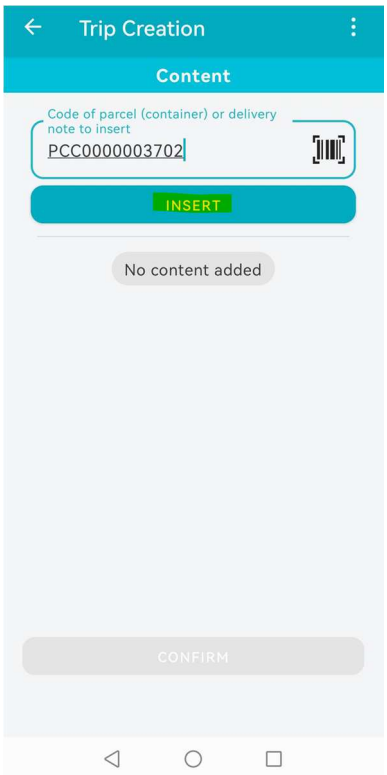
1. Click on “Create Trip”.



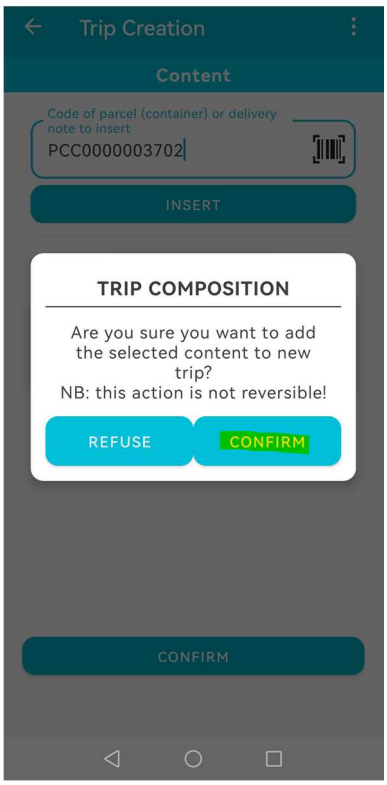
2. Enter the code of the parcel/Parcel Container/DN (SEE WARNING 2 AT BOTTOM OF PAGE).



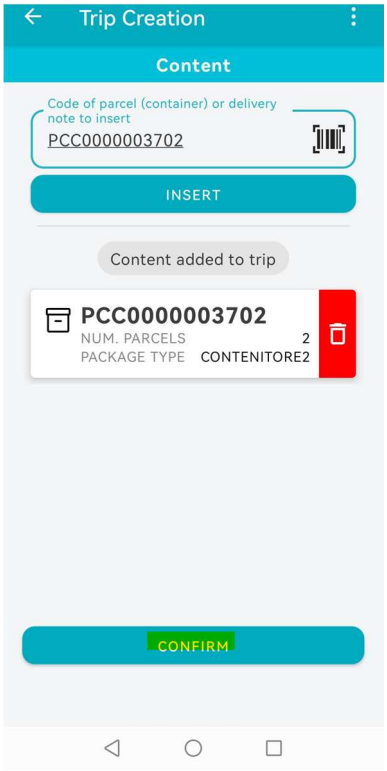
3. Click on "Insert".



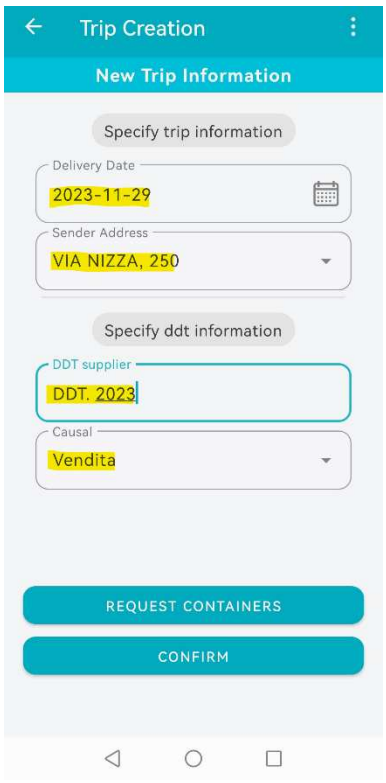
4. Click on "Confirm" to proceed.



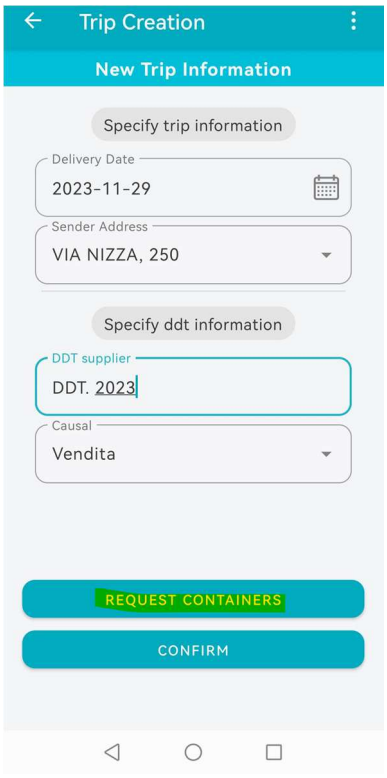
5. The content added to the trip will be displayed. Click on "Confirm" to proceed.



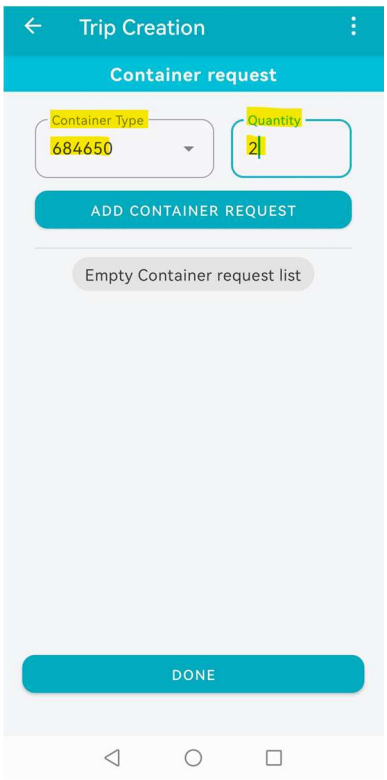
6. Enter the required information.



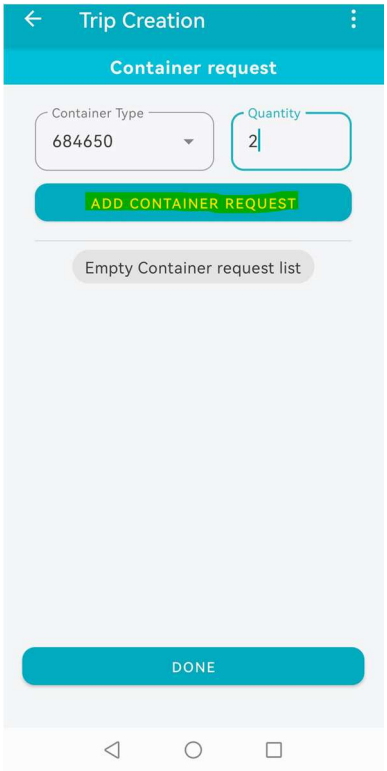
7. Click on “Request Containers” if the supplier wishes to collect empty containers when they arrive at the plant.



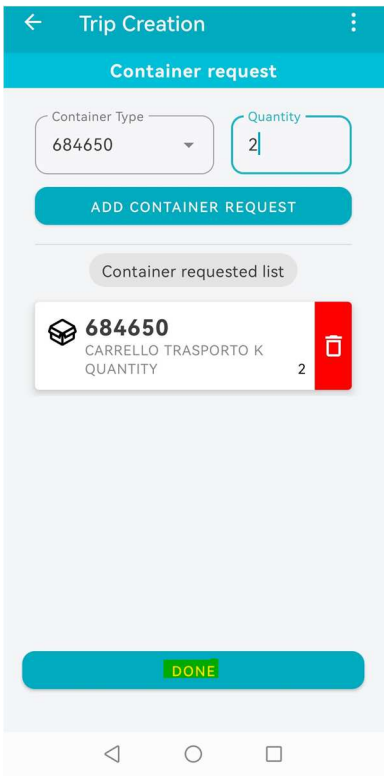
8. Enter the required information.



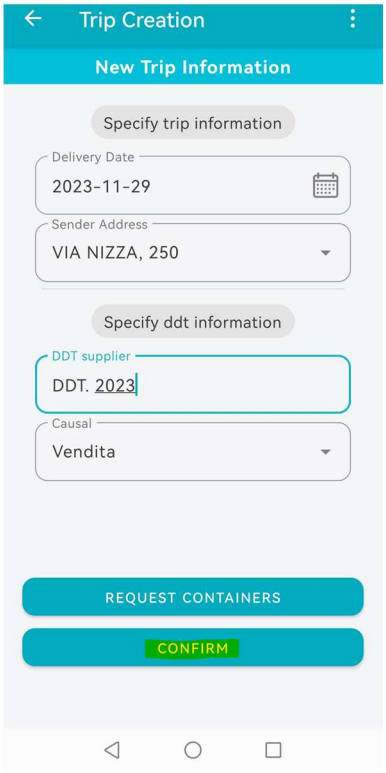
9. Click on “Add Container request”.



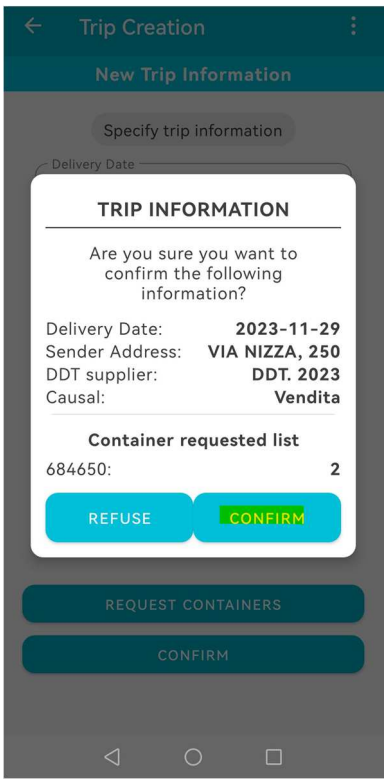
10. Click on “Done” to register the request for empty containers.



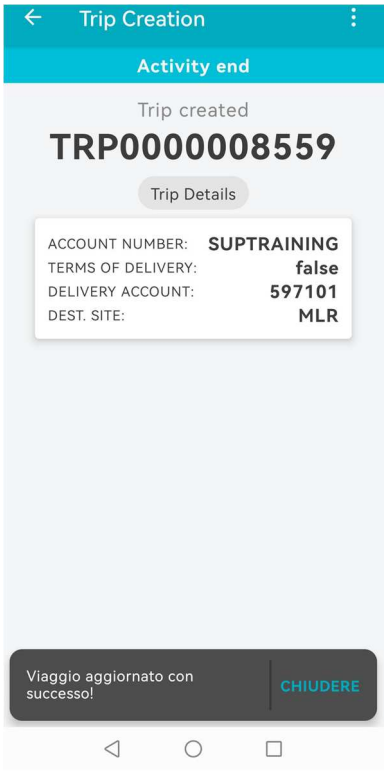
11. Click on “Confirm” to proceed.



12. If the summary information is correct, click on “Confirm” to complete the trip creation.



13. Trip successfully created.



Warning 1

The system verifies that the supplier's masterdata have been previously validated by the supplier.

If they have not been validated, it interrupts the process and requests their validation.

Warning 2

In the event that the user selects parcel/Parcel Container/DN referring to different:

- Account delivery
- Sites
- Delivery class
- Account number
- Order lines to be processed with delivery date too far away from the date

the system blocks the process by reporting the error to the user.

TRIP ASSIGNMENT

The process step described in the following paragraph aims to define who will physically transport the goods to the Merlo sites.

This step acts as a link between the Supplier Portal module and the Dock Scheduling module, as the actor to whom the trip is assigned can create an appointment and manually (or automatically) schedule it in an available slot.

To perform these operations, proceed via the Resources Menu → Trip.

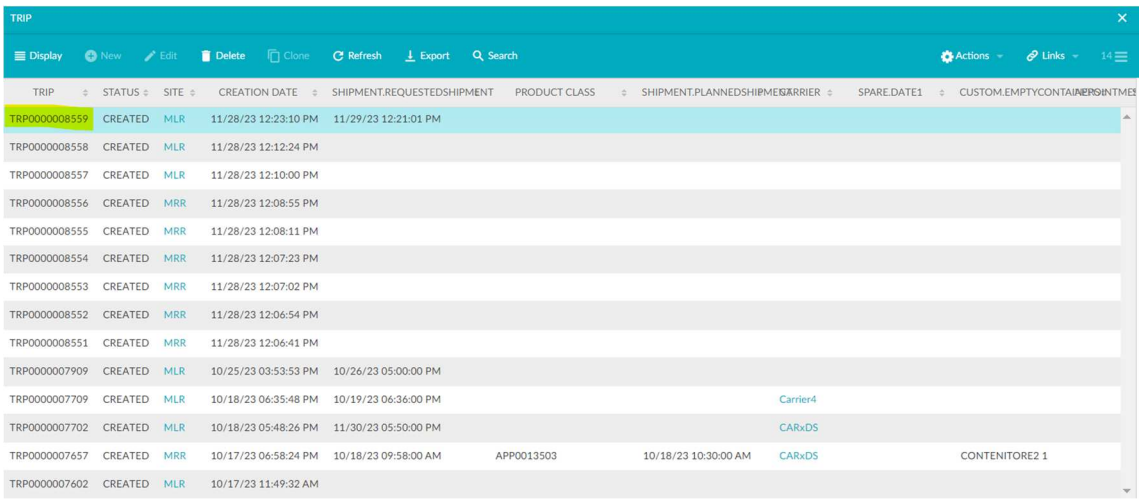
At this stage of the process, the user selects the trips that he wants to assign and make available to the actor who will perform the transport.

Selecting several trips and assigning them will create a new trip that will contain the DN of the selected trips. The action can also be performed on a single trip.

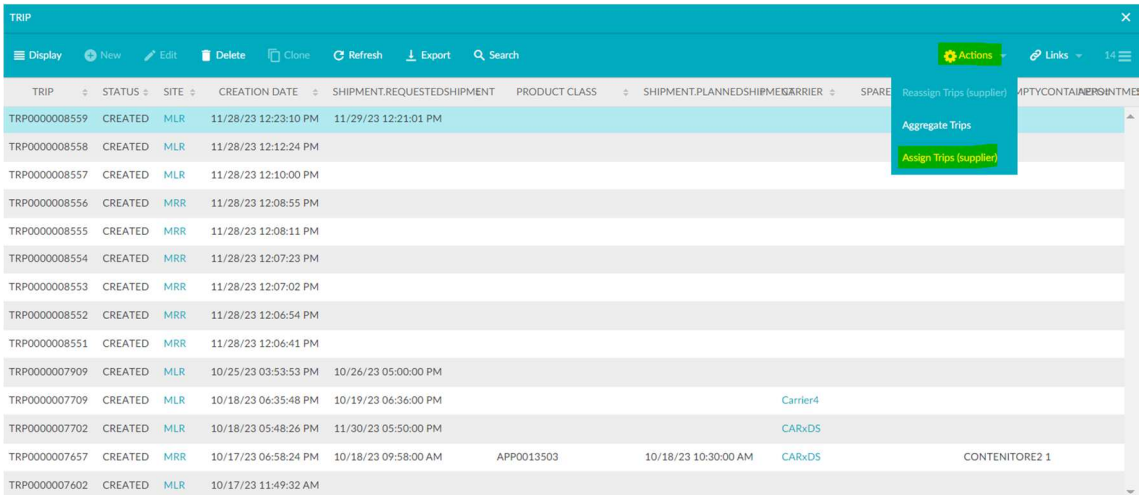
It will only be possible to assign trips within one's competence and therefore on the basis of the Class rendered.

The process involves:

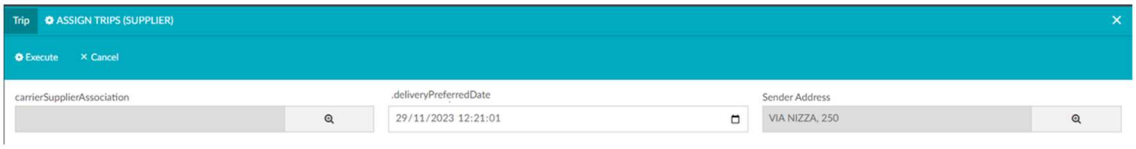
1. Select the trip for which the action is to be performed.



2. Click on "Actions" and then on "Assign trips".



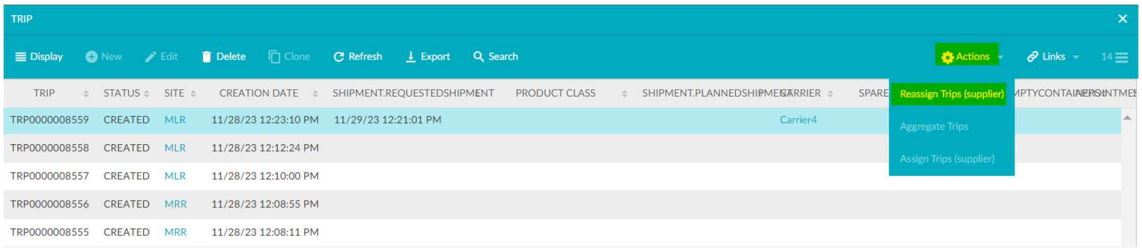
3. The user must select the actor who will carry out the transport (typically a carrier, but it is also possible to configure the supplier itself or Merlo) (SEE WARNING AT BOTTOM OF PAGE).



4. Confirm your choice using the "Execute" button.

The system allows you to reassign trips previously assigned to a carrier.

The operations to be carried out are the same as for assigning the trip to the supplier.



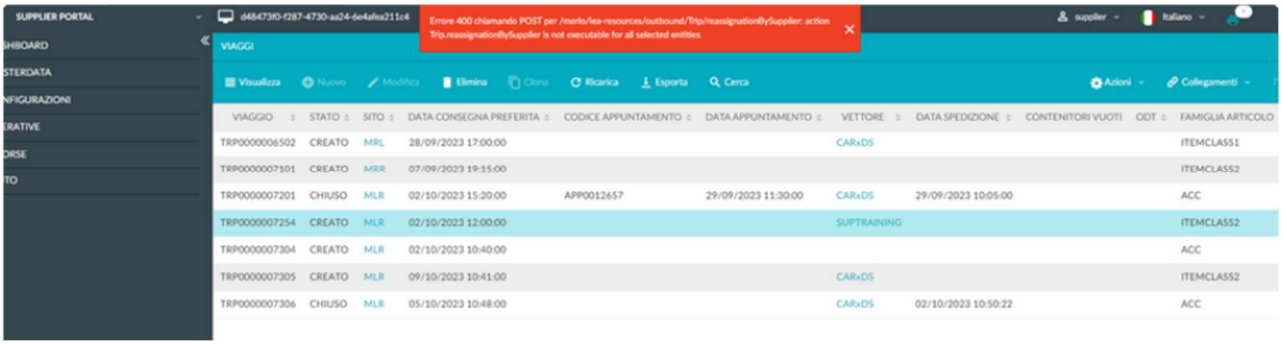
In case of reassignment the system proceeds to change the carrier and the applicant of the trip.

Warning

In the event that the user selects trips referring to different:

- Account delivery
- Delivery class
- Account number

the system blocks the process by signalling the error to the user.



TRIP AGGREGATION

In order to simplify the process, following the creation of trips, the system allows (optional task) to aggregate trips with

similar characteristics (Yield class, Delivery account, Account number).

In particular, starting from trips generated by SP, not yet assigned to a carrier and therefore in "TO BE ASSIGNED" status, it is possible to aggregate them into a single trip. The supplier must specify a preferred delivery date for the generated trip and the departure address.

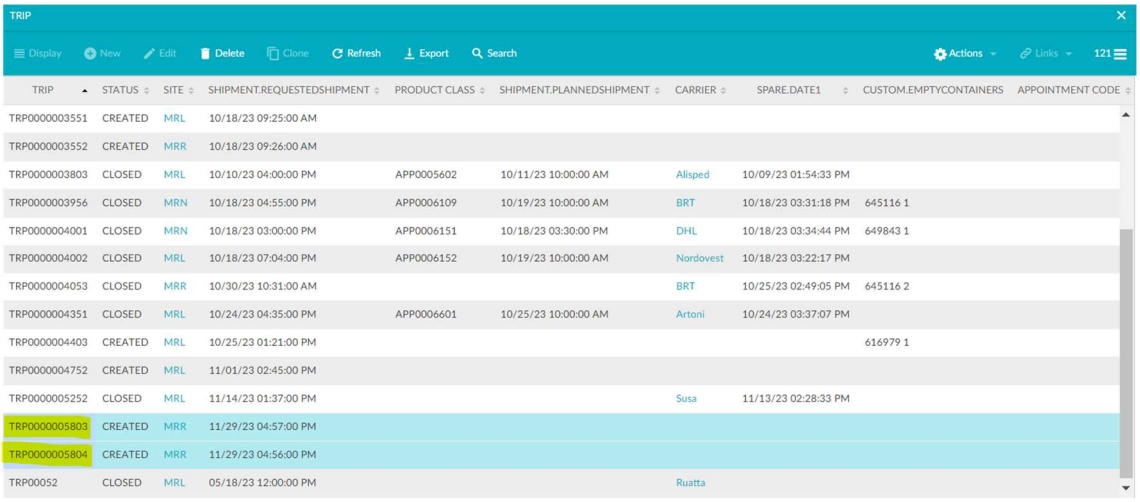
The aggregation can be of two types and keeps the departure dates separate.

This step is performed via the web.

To carry out these operations, proceed via the menu Resources → Trip.

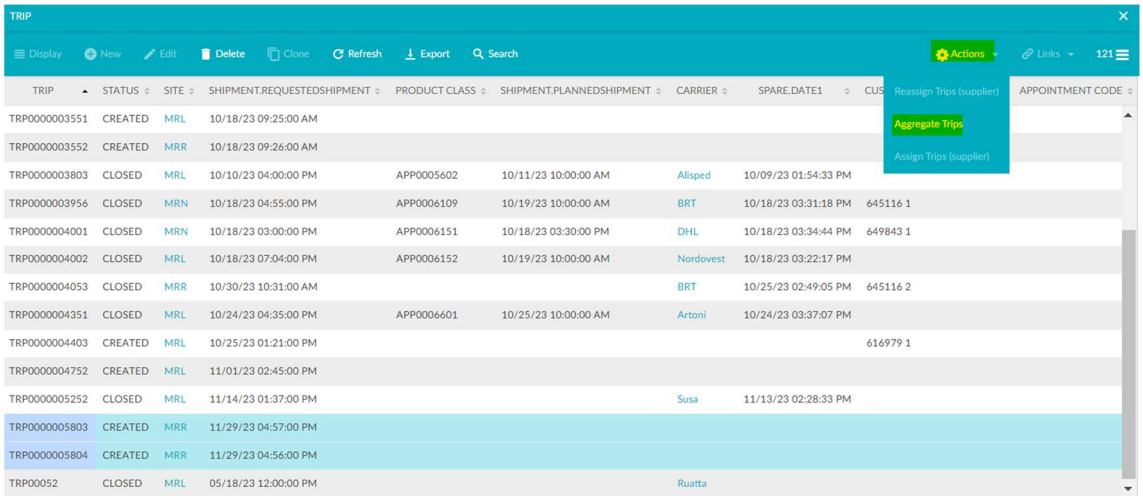
The process involves:

1. The supplier selects the trips he wants to aggregate into a single trip.



2. Click on “Actions” and then the action "Aggregate Trips" is selected. (SEE WARNING AT THE BOTTOM

OF THE PAGE)

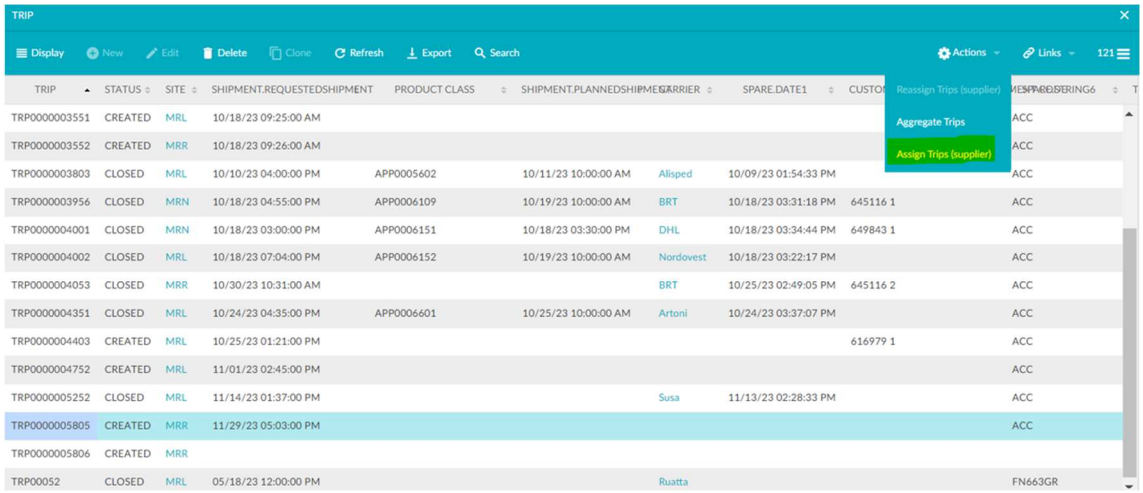


3. The supplier must specify:

- Preferred delivery date for the generated trip: this date is set by default as the lower of the dates specified for the trips selected
- Sender address: indicates the shipping address from which the goods to be shipped will depart. No consistency checks are performed on the shipping addresses specified in the individual trips

4. Click on "Execute", so that the trips can be created.

5. Following confirmation of the parameters, the trip will be created in "CREATED" status and will be available for assignment to the carrier. The trip will contain the original DN.

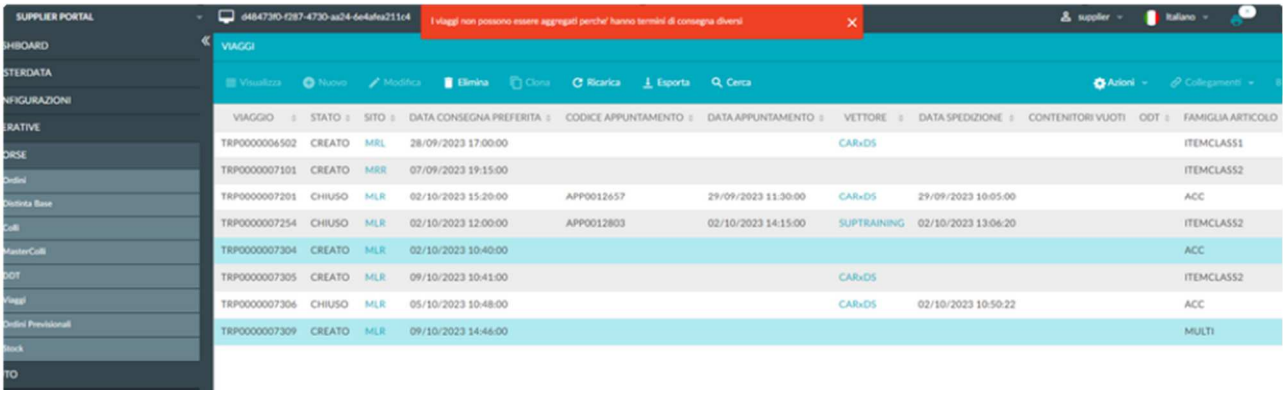


Warning

In case the user selects trips referring to different:

- Account delivery
- Delivery class
- Account number

the system blocks the process by signalling the error to the user



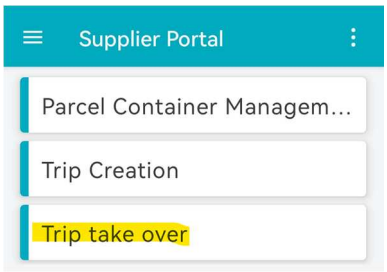
TRIP TAKE OVER

This process step is the last task to be performed on a trip in the SP and allows the trip to be closed following the take-over of the goods.

This step is performed via mobile phone through the Supplier Portal Menu → Trip take over and allows:

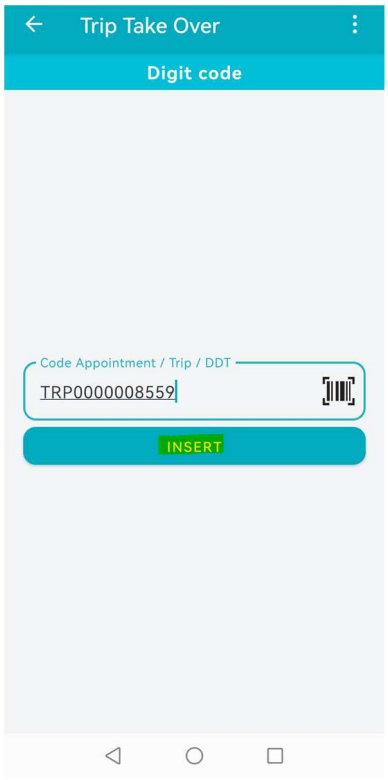
- to the supplier, to electronically affix his signature and certify the DN to be entrusted to the person operating the transport.
- to the transport operator, to digitally affix his signature on the DN taken over.

This is done via the Menu Supplier Portal → Trip take over.

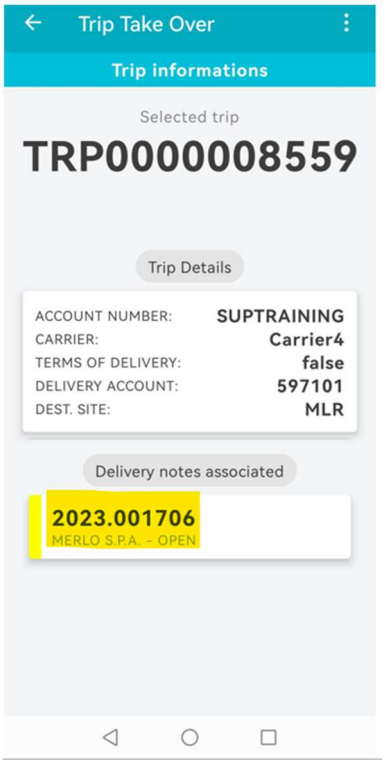


The carrier must notify the supplier of the Appointment/Travel/Travel code that is part of the appointment.
The process involves:

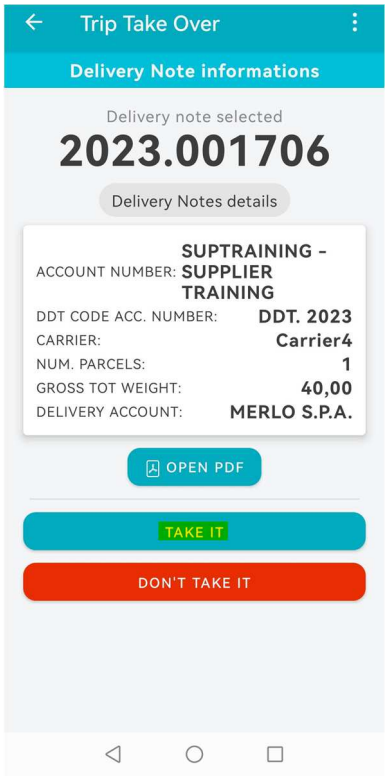
1. Following communication by the carrier, the supplier enters the code communicated to him. Click on "Insert" to proceed.



2. The system automatically retrieves the DN from that supplier's the trip. The supplier can click on each DN to view it and allow the carrier's signature.



3. Click on "Take it".



4. The carrier (or transport operator) takes charge of the DN by digitally affixing a signature to it. Click on "Confirm" to complete the taking charge of the journey.

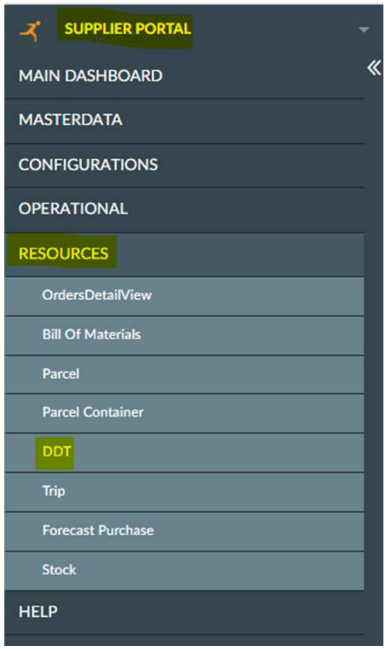
The DN is updated and the signature just affixed will be displayed.
The previous two operations are performed for all DN related to the appointment.
Once the actions have been carried out on all the DN, the trip relating to the signed DN pass into the CLOSED state.
The transport documents taken over will be signed by the user of the supplier who performed the action. In the signature field of the sender will be entered: "Company Name + Date and Time Signature + User ID".

DDT VIEWING

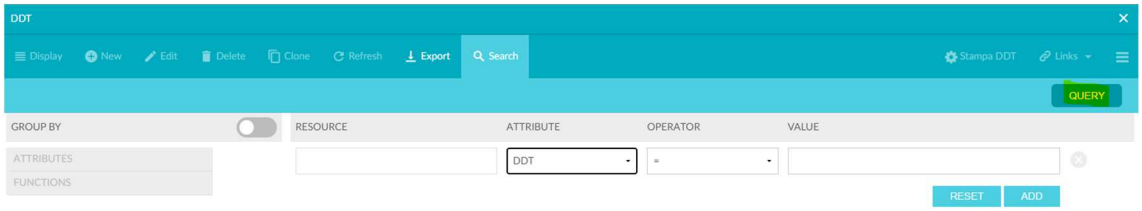
After using the “Trip Creation” operation, a DN will be created automatically.

To view the BOM from the Supplier Portal, you will need to:

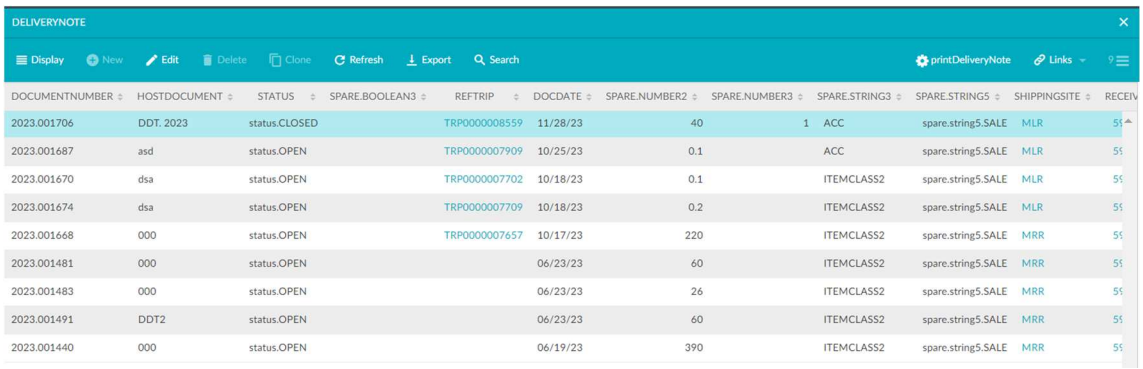
1. Go to Resources → DDT



2. Set filters and press “SEARCH”.

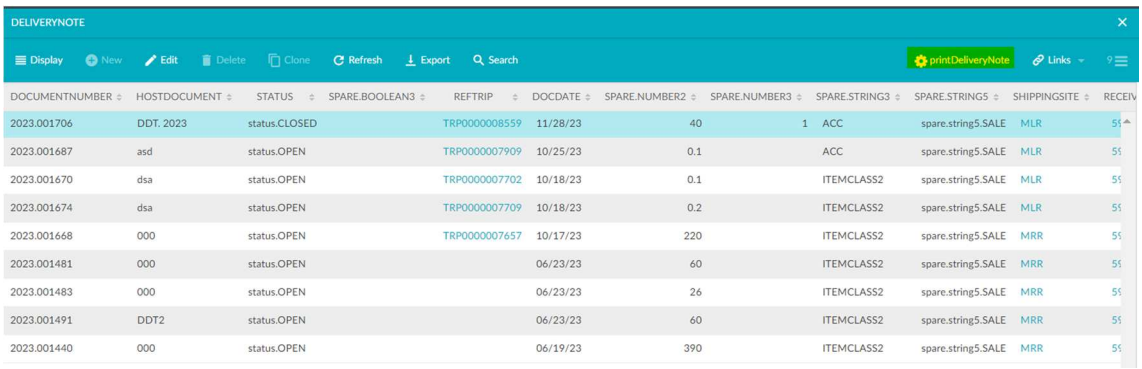


3. The DN will then be visible.

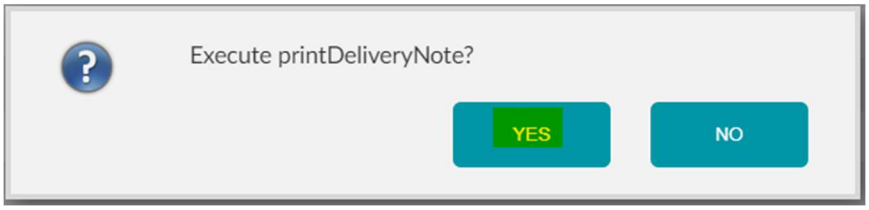


To print the DN:

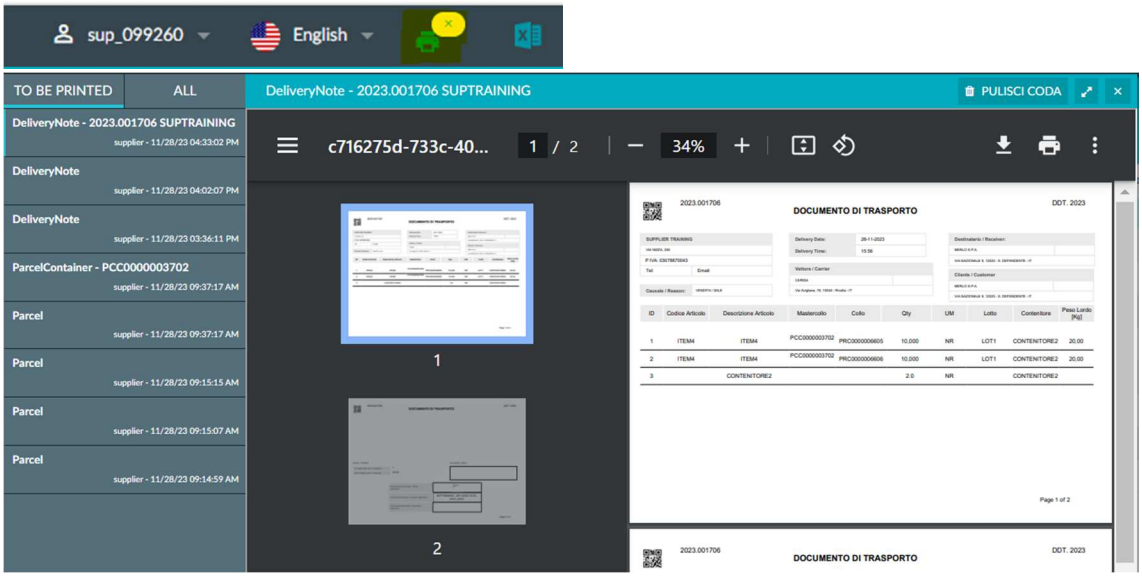
1. From the screen displaying the DN, click on “Print DN”.



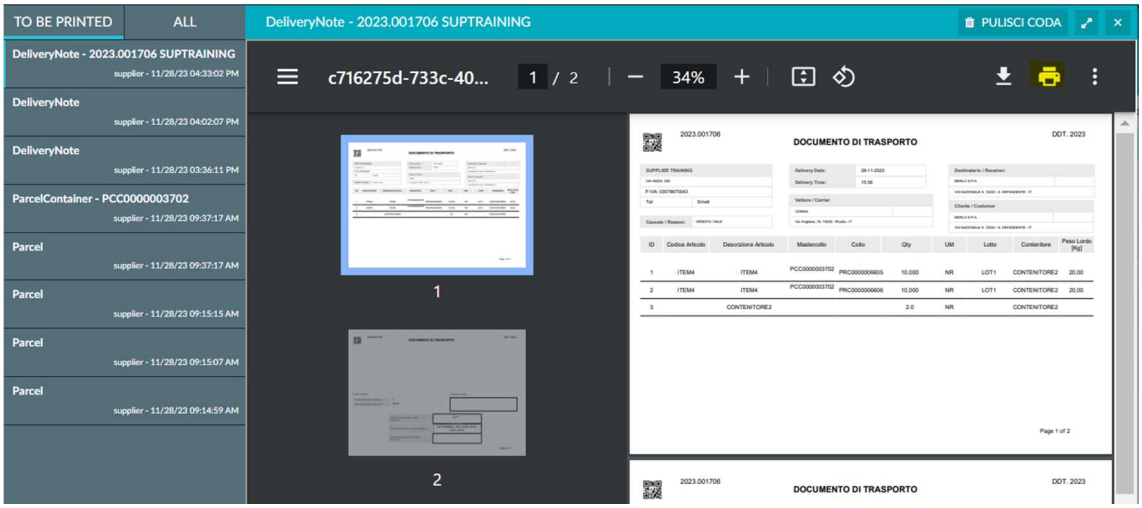
2. Then press “YES”.



3. Pressing on the printer icon will display the print queue.

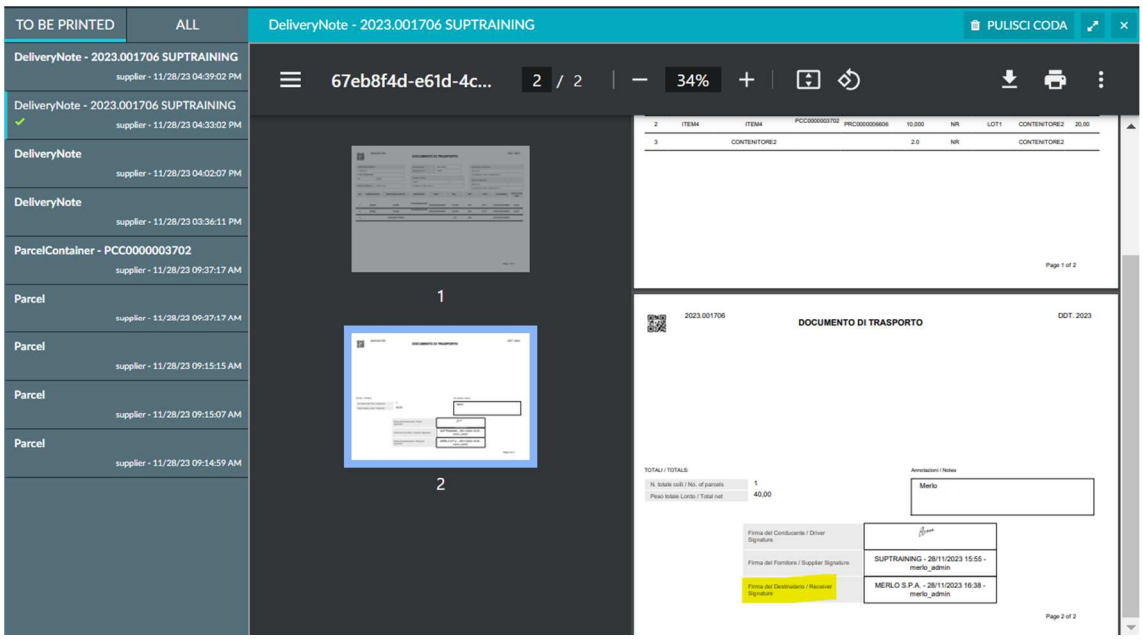


4. To print, simply press on the printer icon.

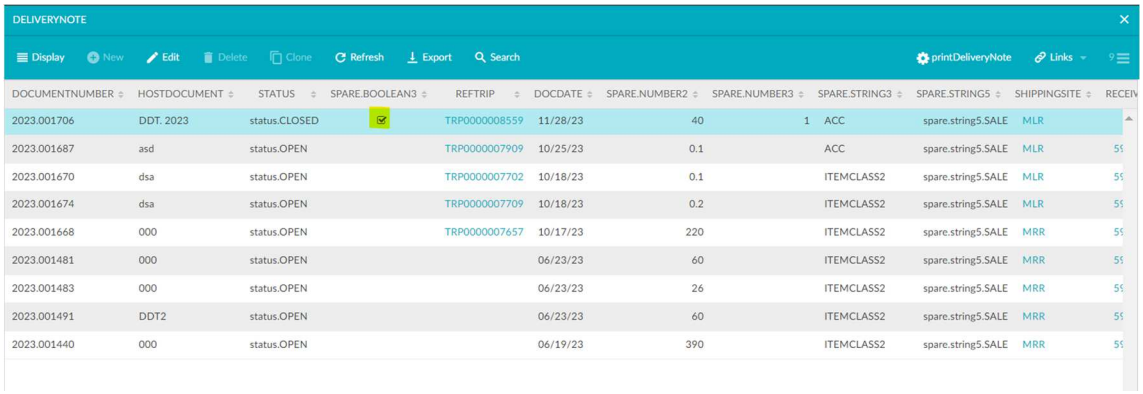


To verify that the Merlo-side signature has taken place you have two possibilities:

1. Verify that the field “Recipient's signature” is filled in.



2. Check that the “DN Signed” flag is present on the DN line.



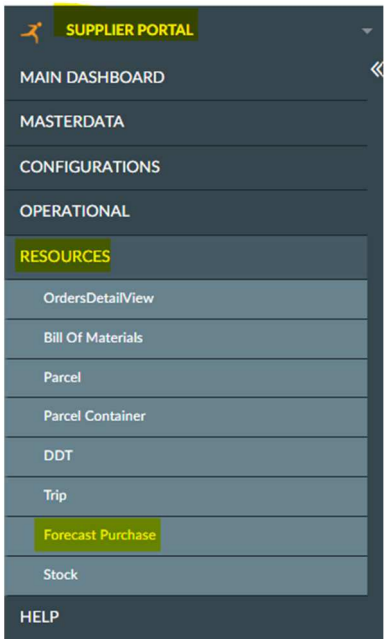
DOCUMENTNUMBER	HOSTDOCUMENT	STATUS	SPARE.BOOLEAN3	REFTRIP	DOCDATE	SPARE.NUMBER2	SPARE.NUMBER3	SPARE.STRING3	SPARE.STRING5	SHIPPINGSITE	RECEI
2023.001706	DDT. 2023	status.CLOSED	☑	TRP0000008559	11/28/23	40	1	ACC	spare.string5.SALE	MLR	
2023.001687	asd	status.OPEN		TRP0000007909	10/25/23	0.1		ACC	spare.string5.SALE	MLR	5
2023.001670	dsa	status.OPEN		TRP0000007702	10/18/23	0.1		ITEMCLASS2	spare.string5.SALE	MLR	5
2023.001674	dsa	status.OPEN		TRP0000007709	10/18/23	0.2		ITEMCLASS2	spare.string5.SALE	MLR	5
2023.001668	000	status.OPEN		TRP0000007657	10/17/23	220		ITEMCLASS2	spare.string5.SALE	MRR	5
2023.001481	000	status.OPEN			06/23/23	60		ITEMCLASS2	spare.string5.SALE	MRR	5
2023.001483	000	status.OPEN			06/23/23	26		ITEMCLASS2	spare.string5.SALE	MRR	5
2023.001491	DDT2	status.OPEN			06/23/23	60		ITEMCLASS2	spare.string5.SALE	MRR	5
2023.001440	000	status.OPEN			06/19/23	390		ITEMCLASS2	spare.string5.SALE	MRR	5

OPENING OF FORECAST ORDERS

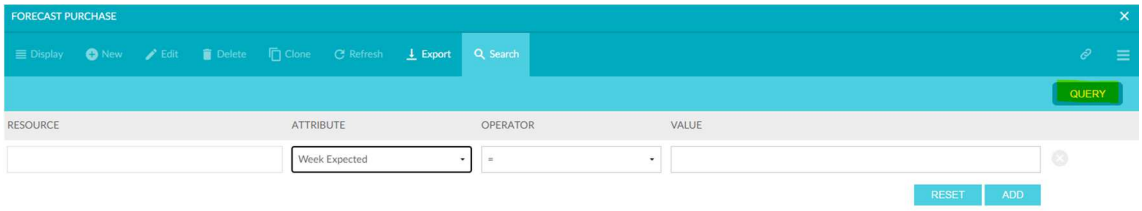
With the introduction of LEA REPLY, provisional orders will no longer be sent by email but will be viewable directly on the portal.

To view order it will be necessary to:

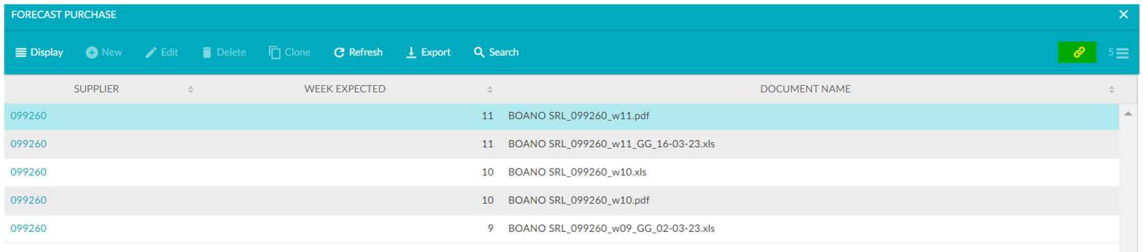
1. Proceed from the Supplier Portal via RESOURCES → FORECAST PURCHASE.



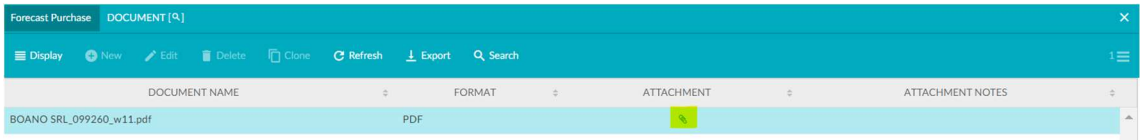
2. Set the filter type and click on “SEARCH”.

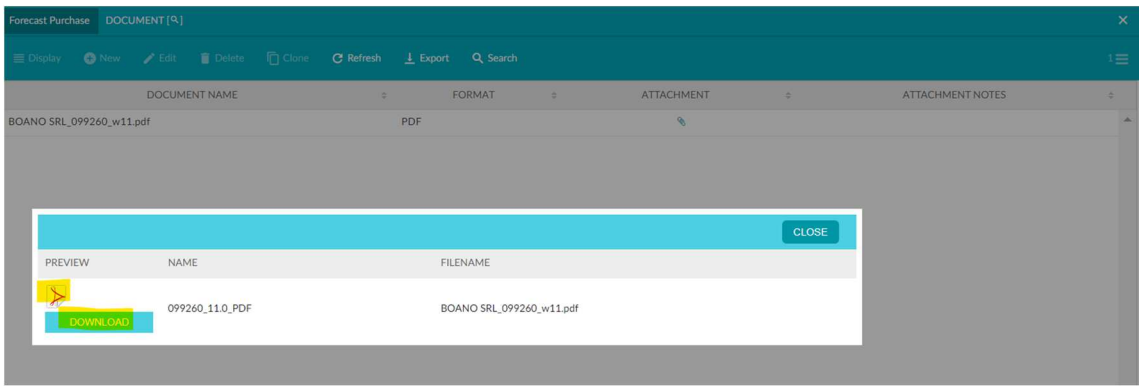


3. The orders for the selected weeks will then be visible. The orders will be displayed both in pdf format (rows ending in .pdf) and in Excel format (rows ending in .xls). Select the line for the selected week and click on the link.



4. At this point, to view/save the file, click on the “paperclip” icon and choose whether to preview (by clicking on the table image) or save the file (by clicking on the “Download” button).



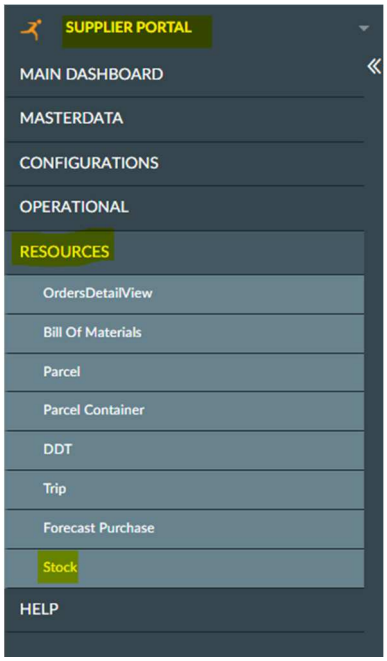

Forecast Purchase
DOCUMENT
Display
New
Edit
Delete
Clone
Refresh
Export
Search
DOCUMENT NAME
FORMAT
ATTACHMENT
ATTACHMENT NOTES
BOANO SRL_099260_w11.pdf
PDF
CLOSE
PREVIEW
NAME
FILENAME
DOWNLOAD
099260_11.0_PDF
BOANO SRL_099260_w11.pdf

STOCK READING AND INVENTORY REQUEST

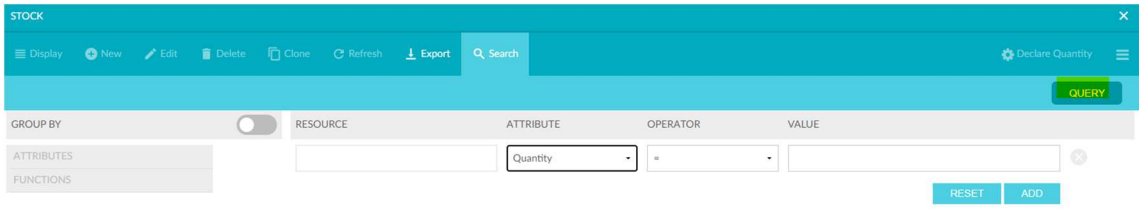
The portal makes it possible to consult the stock of raw material delivered for account work, stock updated to the last DN recorded on the side Merlo.

To view the stock you will need to:

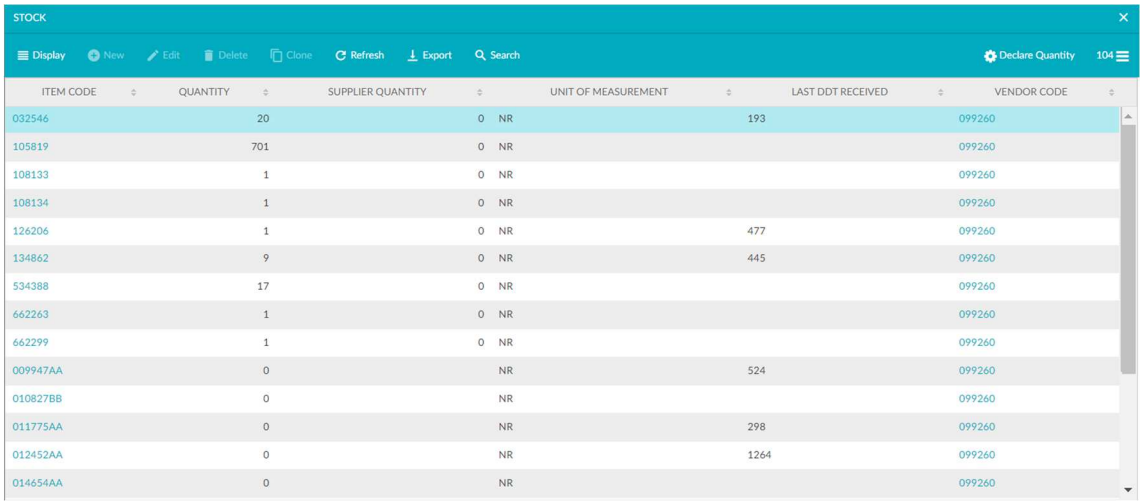
1. Go to RESOURCES → STOCK.



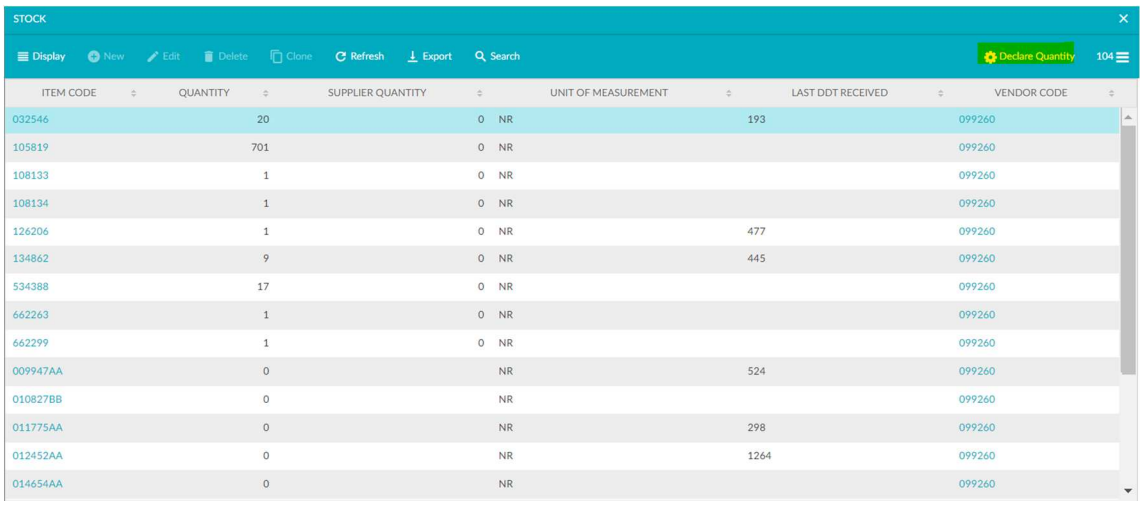
2. Use the appropriate filters and then click on “SEARCH”.



3. All stocks will then be visible.



4. It will then be possible to confirm the quantities using the “Declare Quantity” button.



5. It will then be possible to choose the desired quantity by filling in the “New Supplier Quantity” field.

In addition, in order to monitor supplier quantities, Merlo can activate the inventory request function through which it can request confirmation of the quantity in stock from the supplier.