FEATURES IN TRIMIT SUPPLIER PORTAL

This document describes the features available in the TRIMIT Sales Agent Portal, released with TRIMIT 2016.

The TRIMIT Supplier Portal is built to handle the communication about Purchase Orders and Purchase Quotes between a Company and its Supplier of finished Products in the product life cycle phases of Pre-Sales, Sales, Delivery and Re-Order.

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ABBREVIATIONS

NAV/TRIMIT; is referring to Microsoft Dynamics NAV 2016, with TRIMIT 2016.
CPO; is referring to the TRIMIT Connect Portal.
Company; is the owner of TRIMIT Supplier Portal.
Customer; is referring to another company registered as a Customer of the Company.
User: is referring to a Portal user.
Registered User; is the employee of the supplier.
Basket; is referring to the sales order in the shop, also called "Shopping Cart".
Product; is in TRIMIT defined as the Master.
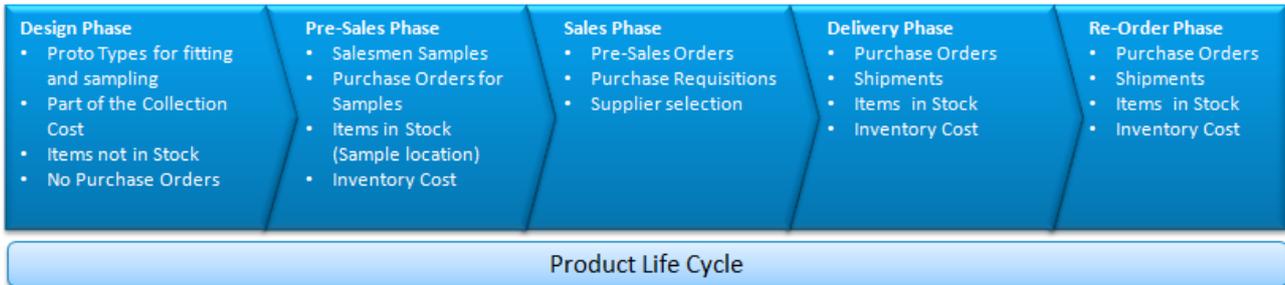PDM; is a general term for Product Data Management.
TRIMIT PDM; is the TRIMIT functionality for Product Data Management.

CONTENTS

USAGE OF THE SUPPLIER PORTAL

This section will focus on the workflow between the Company and Supplier, in the lifecycle of a new Product. The workflow consists of 5 phases as illustrated below:

Design Phase	Pre-Sales Phase	Sales Phase	Delivery Phase	Re-Order Phase
• Proto Types for fitting and sampling • Part of the Collection Cost • Items not in Stock • No Purchase Orders	• Salesmen Samples • Purchase Orders for Samples • Items in Stock (Sample location) • Inventory Cost	• Pre-Sales Orders • Purchase Requisitions • Supplier selection	• Purchase Orders • Shipments • Items in Stock • Inventory Cost	• Purchase Orders • Shipments • Items in Stock • Inventory Cost

Product Life Cycle

Below is a description of each phase. Notice that the Supplier may differ from Product to Product and from phase to phase.

DESIGN PHASE

In this phase the Product is created. It is a highly creative phase that has a vast number of unstructured data. The role of the Supplier can be to create the Prototypes or create prototypes for raw materials like fabrics, zippers, leather, wood, etc. However, in this phase this can also be done by the Company itself or at a local Supplier specialized in prototype production. The making of Prototypes can be an ongoing iterative process, where different materials, different measurements and different accessories are adjusted a large number of times. Typically, the Prototypes of the Product are not put on stock as Items and the cost of making the Prototypes are considered a part of the collection cost. This phase makes only little use of the ERP system. TRIMIT functionality for this phase is typically the Workflow part in TRIMIT Product Data Management (PDM). Once the product gets more defined, it will be like wise to be more defined in TRIMIT PDM.

The Supplier Portal will support this phase, once the Product is created in NAV/TRIMIT, by allowing the Supplier to read all PDM information for Products in Prototype purchase quotes/orders and to reply in PDM Comments and Workflow Comments. Prototype purchase quotes/orders are handled as normal purchase quotes/orders. Each Supplier can only see Products that they are to deliver.

PRE-SALES PHASE

In this phase, the Product is defined and the process is to produce and ship Samples to the Salespersons. Salespersons can be on widely spread locations. The role of the Supplier is to produce and ship the Samples to the salespersons directly or to the Company itself. The order quantity will typically be very little. This phase makes high use of the ERP System to handle the Product, the purchase quotes and orders (for raw materials) and the Suppliers.

The Supplier Portal will support this phase by allowing the Supplier to see purchase quotes/orders made to him and he can reply on receipt dates and quantities. Sample quotes/orders are handled as normal purchase quotes/orders.

SALES PHASE

In this phase, the Company will evaluate on all the Pre-Sales Orders to define the specific requirement of each Product, and turn that into purchase quotes. This will result in large purchase orders for the Products. There can be multiple shipment dates and locations. This phase makes high use of the ERP System to handle the Product, the purchase quotes/orders and the Suppliers.

The Supplier Portal will support this phase by allowing the Supplier to see purchase orders and purchase quotes made to him and he can reply on receipt dates and quantities.

DELIVERY PHASE

In this phase the purchase orders are to be received. Focus in this phase is the receipt of the purchase orders. Receipt can be from Supplier to the Company, to multiple company locations or directly to the Customers of the Company. The role of the Supplier is to maintain the receipt information (date and quantity) on the purchase orders. This can also have its effect on the sales orders but this will only be a decision of the Company, not of the Supplier. This phase makes high use of the ERP System to handle the Product, the purchase orders, Suppliers and the sales orders.

The Supplier Portal will support this phase by allowing the Supplier to see purchase orders and purchase quotes made to him and he can reply on receipt dates and quantities.

RE-ORDER PHASE

In this phase, selected Products can be re-ordered. Focus is as in the Sales/Delivery Phase. The Supplier probably stays the same. The role of the Supplier is to maintain the receipt information (date and quantity) on the purchase orders. This phase makes high use of the ERP System to handle the Product, the purchase orders and the Suppliers.

The Supplier Portal will support this phase by allowing the supplier to see purchase orders and purchase quotes made to him and he can reply on receipt dates and quantities.

THE PORTAL FEATURES

ORDER HANDLING

The main purpose of the TRIMIT Supplier Portal is to handle the purchase order giving the Supplier the ability to give feedback on the purchase order. That has resolved in the Document Pages where the Supplier can see own purchase quotes and own purchase orders.
The Supplier can give the following feedback on:
- Purchase quotes the Supplier can enter "Promised Receipt Date"
- Purchase orders the Supplier can enter "Promised Receipt Date" and "Quantity to Receive"

That the Supplier has given feedback can be seen in the Portals Activity Log found in the Portals Role Center.

PDM AND MESSAGES

The Supplier Portal also supports the design phase and has a messaging from the Company to the Supplier. That has resolved in the message board on the Home Page and the PDM Pages.

The Message board is in this version one-way; the Company can write messages to the Supplier. The PDM pages allow the Supplier to see almost all PDM information from NAV/TRIMIT, download pictures and make both PDM Comments and Workflow Comments.

ADVANCED PURCHASE INTEGRATION

When both the Company and the Supplier can edit in the same data, it is important to avoid locking and overwriting changes and for the Company to validate the changes from the Supplier. With the Advanced Purchase Integration, the Purchase documents are stored temporarily in a separate place, when the Supplier makes a change on the Supplier Portal. The temporary Purchase Document is checked out to the Supplier until the editing is finished. The Company can then validate the information and update the Purchase Document (quote or order).

PORTALS ROLE CENTER

The TRIMIT Portals Role Center includes the access to the Advanced Purchase Integration, the Portals Messages and the Activity Log.

BEST PRACTICE LAY-OUT

The purpose of the lay-out is for the user to feel at home and be able to do his work without further instructions. TRIMIT Supplier Portal comes with a lay-out that is similar to the TRIMIT Sales Agent Portal and the TRIMIT B2B Shop. This lay-out has proven its ease of use.

DASHBOARD

The dashboard on SUP portal assembles all the needed information in one place. It is a launch page for different activities. Dashboard for the supplier portal has he following areas: Actions, Messages, News and My account.

MESSAGING

Portals messages have a basic functionality, which allows sending text messages, which can also include files. Messages can be sent only one way, i.e. from TRIMIT to Portals. SUP portal displays a list of received messages on a dashboard.

REGISTERED USER FEATURES

The following features only concerns registered users.

CREATE USER PAGE

TRIMIT Supplier Portal has a standard create user page that includes the normal user data (name, address, e-mail).

USER VALIDATION

Before the user can gain access to the TRIMIT Supplier Portal, the user needs to be related to a Vendor in NAV/TRIMIT. This can only be done by the company in NAV/TRIMIT in the Portals Role Center via the user relationships.

MY PAGE

When the registered user logs in to the TRIMIT Supplier Portal a "My page" is available.
In the "My page" the user can see own data.

PLATFORM FEATURES

The following features concern the web platform and the integration to NAV/TRIMIT.

CMS PLATFORM

The CMS platform for TRIMIT Supplier Portal is the TRIMIT ConnectPortal (CPO). CPO is a highly advanced CMS product, built on the latest .net coding and built for making integration between portals and NAV/TRIMIT. The CPO comes with a user-friendly Admin interface.

The CPO includes the CMS features like:
- Multiple sites
- User handling with user groups.
- Menus pages and menu structure.
- Content pages with lay out editor and HTML editor and a long range of available controls.
- Different types of content pages like document pages, list pages, content pages etc.
- Site appearance managed in style sheets.

ONLINE DATA FROM NAV VIA CONNECTPORTAL INTEGRATOR

The ConnectPortal integrator is managing the on-line data transfers between the CPO and the NAV/TRIMIT database. Data is exchanged via NAV/TRIMIT web services.
In the CPO, the ConnectPortal integrator is a number of NAV/TRIMIT controls that can be used in the CPO pages. In NAV/TRIMIT the ConnectPortal, integrator is the XML ports where the definition of what NAV/TRIMIT data to move is set. It is also the entire setup of the TRIMIT Supplier Portal.