Customer Portal

Entering a Logistics Service Order

User Manual

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1 Preamble

1.1 *Purpose of the guide*

This guide is primarily intended for STEF customers. It can be used by customers who have access to the portal and wish to discover how to use it or by regular users who are looking for an answer to a specific question. Finally, it can also allow customers who do not yet have access to the portal to discover the module with a view to joining the service.

Secondly, this guide is intended for STEF operators, either for their own use or as an information relay for their customers.

1.2 *Eligibility*

Entering service orders via the customer portal is an alternative to transmitting orders via EDI or API, which is why the activation of the module must be in line with the overall order transmission strategy.

Only STEF customers whose logistics activities are managed with Agrostar WMS are eligible to use this module.

1.3 *Scope of application*

This module allows you to :

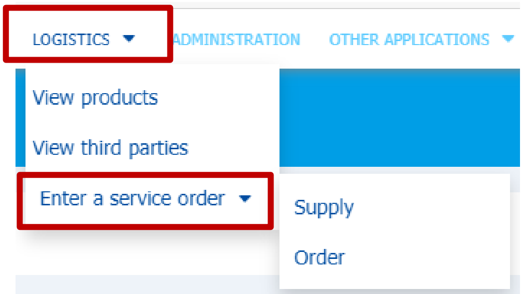
- Create new orders by input or import
- View, modify and transmit orders pending validation
- Track transmitted orders

2 Entering a service order

2.1 *Access to the Customer Portal*

This module is part of the STEF customer portal: https://clients.stef.com/
The user must have an active account associated with a known third party and itself associated with one or more logistics files.

2.2 *Access to the module*



To access order management, click on the LOGISTICS menu to open it and then on Enter a service order.

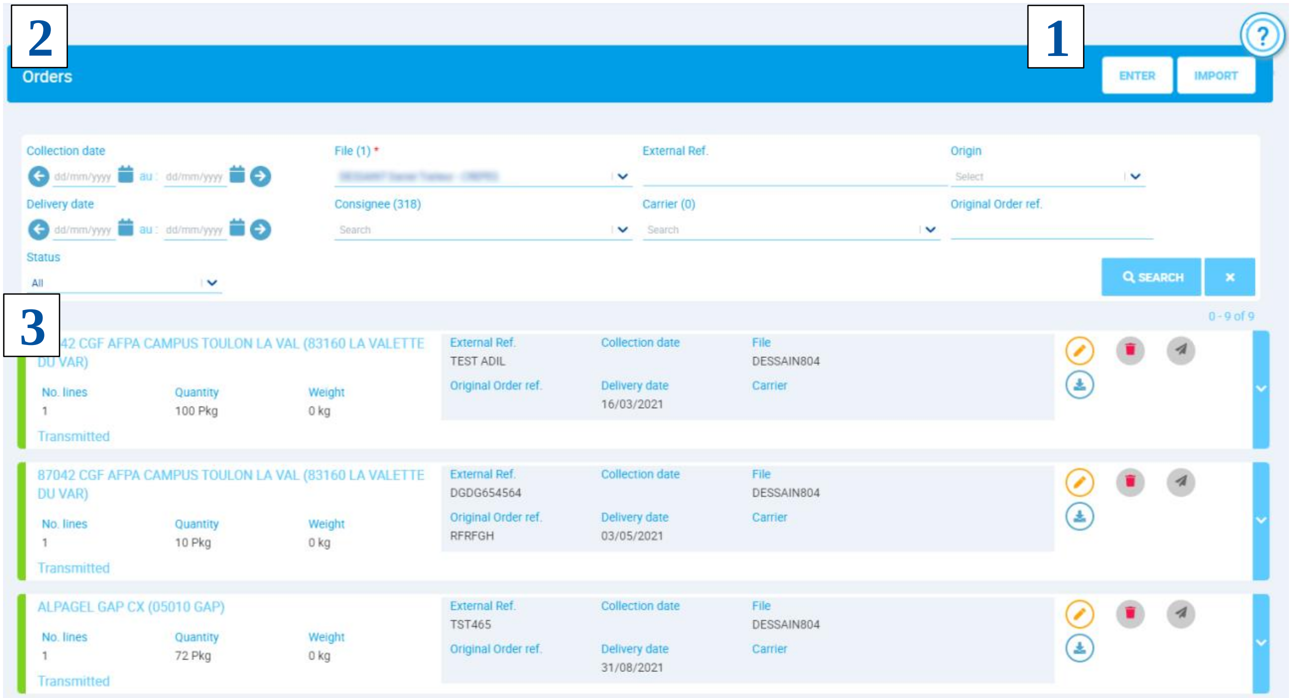
3 Orders

3.1 *Display of the order portfolio*

This page is the home page of the module.

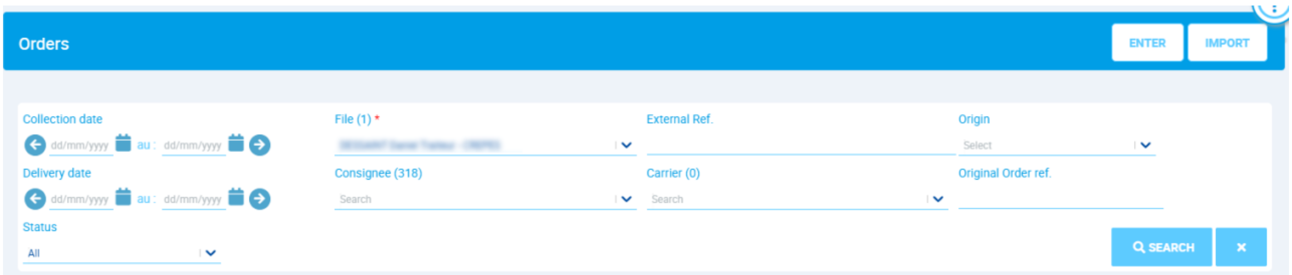
The display of the order portfolio consists of three areas:

1. The header which contains the links to the pages
    - Entering a new order
    - Importing an order
2. The search area that allows access to different criteria and filters.
3. The result area to view the orders of the file corresponding to the filters from their creation to their validation.



3.2 *Search for orders*

3.2.1 Details of the search criteria



The search always focuses on a single file.

The Origin criterion allows, for example, to filter out orders that have been imported, in order to modify them.

3.2.2 Viewing the results

Each order matching the search criteria is displayed as follows:

A coloured border indicates the status of the orders displayed:

- **Yellow** if the order is being entered or waiting to be transmitted without inconsistencies.
- **Red** if it contains errors. This status necessarily means that the order has not been transmitted.
- **Green** when the order has been transmitted to the warehouse.
- **Grey** from the moment the order is taken over by the warehouse. From this point on, it is no longer possible to modify the order.

Information on the order header

By default the results are displayed in compact mode. It is possible to expand each line of the result in order to display more information about the order with the button  at the end of the line.

Actions on the order

-  Access the details of the order being entered.
-  Delete the order.
-  Send the order to the warehouse.

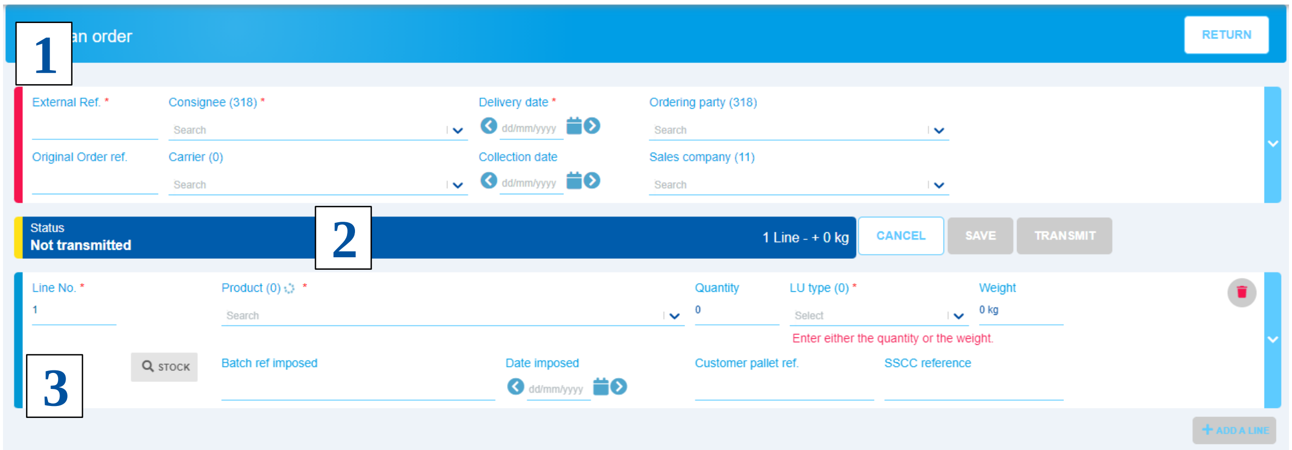
 Download the pdf order form.

These actions are also available from the order details.

3.3 *Entering/viewing the details of an order*

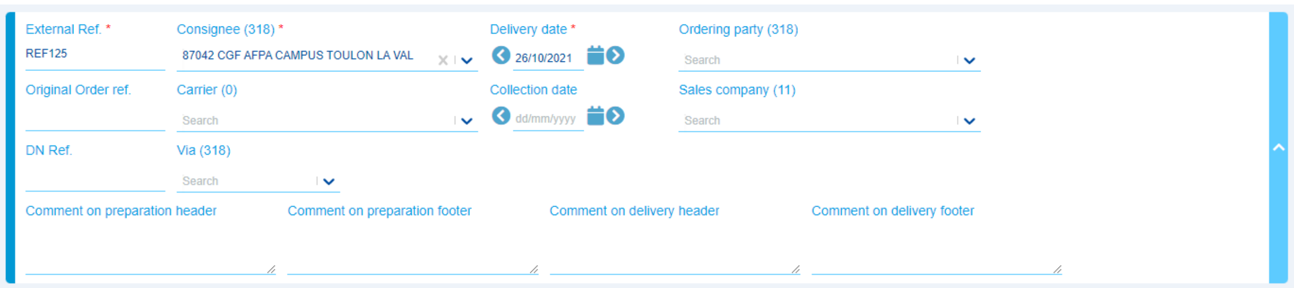
The order detail view consists of three areas:

1. Order header: identification of the order, of the third parties involved as well as the dates.
2. Summary of order details + actions
3. Order lines



3.3.1 Order header

By default the header is displayed in compact mode. It is possible to expand each line of the result in order to to display more information about the order with the button  at the end of the line.



Designation	Field
External Ref	Customer reference. Unique identifier for the order.
Original Order Ref	Original reference for the order.
DN Ref	Additional reference on the delivery note.
Consignee	Consignee third party of the order.
Carrier	Carrier third party for the goods.
Delivery date	Delivery date of the order to the consignee.

Collection date	Collection date of the goods at the warehouse. Calculated by the warehouse in relation to the delivery date if not specified..
Ordering party	Third party carrying out the order on behalf of the customer third party at STEF.
Sales company	
Via	Third party through whom the order must transit.
Comment on preparation header	Comment on the header of the picking list in the warehouse..
Comment on preparation footer	Comment on the footer of the picking list in the warehouse..
Comment on delivery header	Comment on the header of the delivery note.
Comment on delivery footer	Comment on the footer of the delivery note.

3.3.2 Summary of order details & actions

The summary of the order lines includes 3 pieces of information:

- The status of the order
- The number of lines entered
- The sum of the units entered
- The sum of the weights entered

This information is used to check that the order is complete at the time of transmission.

You can carry out 3 actions on the order:

- 

Permanently deletes the order. This action is possible until the order is taken over by the warehouse.
- 

This action is possible until the order is taken over by the warehouse.
- 

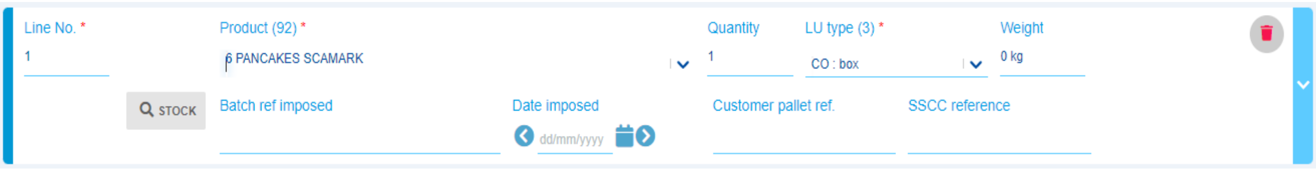
Send the order to the warehouse. This action is only possible for an order pending transmission and without errors.

An order that has already been transmitted to the warehouse can no longer be modified without being transmitted again, which is why only the transmit action is proposed in this situation.

3.3.3 Order lines

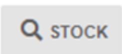
3.3.3.1 Information

By default the lines are displayed in compact mode. It is possible to expand each line of the result in order to display more information about the order with the button at the end of the line.



Designation	Field
Line No.	Line number of the order. Allows lines to be interchanged afterwards.
Product	Product for which the search is based on the following information: designation, alias, EAN13, DUN14
Quantity	Quantity ordered in the LU type indicated.
Weight	Weight ordered in kg. Rounded to the LU type indicated. For a variable weight product the quantity will be estimated in relation to the average weight in stock when the order is transmitted to the warehouse.
LU type	Type of Logistics Unit requested
Batch ref imposed	Production batch reference mandatory for order preparation.
Date imposed	Date required for order preparation. Depending on what is agreed for the product (BBD, production date...)
Customer pallet reference	Customer reference of the requested pallet.
SSCC reference	Reference of the requested pallet
Comment on delivery	Comment on the delivery note
Comment order preparation	Comment on the picking list.

3.3.3.2 Stock consultation

The button 

allows you to consult in real time the available stock according to the information entered for the order line (product, batch reference, date, SSCC reference, customer pallet reference). This feature is an input help but it is not a reservation. It is not guaranteed that the stock that is available at the time of entry will still be available when the order is processed.

3.3.3.2 Actions

The actions available on the order lines are as follows:

- 

Add a line. This one appears under the last existing line.
-  Delete the order line if it is not transmitted or not yet taken over by the warehouse.

3.4 *Importing orders*

Importing an order allows you to automate the data entry. It is possible to import one or more orders simultaneously before eventually finalising them in the application.

3.4.1 Accepted file format

The xlsx file extensions are accepted up to 1 MB.

Download the template to see the accepted data format. The format is fixed, i.e. the position and order of the columns is important for the correct interpretation of the data. Please note that order and supply import files contain different information and are therefore organised differently. Make sure you use the right template for the right type of import.

For products and third parties several identifiers are possible.

The information corresponding to the header can be displayed on the first line of each order or it can be repeated in front of each line.

3.4.1.1 Rejection conditions

An order is generated if it has at least one imported detail line. In other words, it is not possible to generate empty orders through import.

A detail line is imported if the product is identified to a minimum.

Information in the wrong format or not recognized is ignored but it is then proposed to cancel or force the import.

3.4.1.2 Multi-order file

If filled in, the external reference (REF EXT) is used to identify multiple orders within the same file. If the external reference is not filled in, then a new order (Commande) is generated for each change of consignee (DEST) in the file.

For a file with external references, the following two examples result in identical import behavior:

REF EXT	DEST	
C1111	D011	
C1111	D011	Commande 1
C1111	D011	
C1112	D011	
C1112	D011	Commande 2
C1112	D011	
C1112	D011	

REF EXT	DEST	
C1111	D011	
		Commande 1
C1112	D011	
		Commande 2

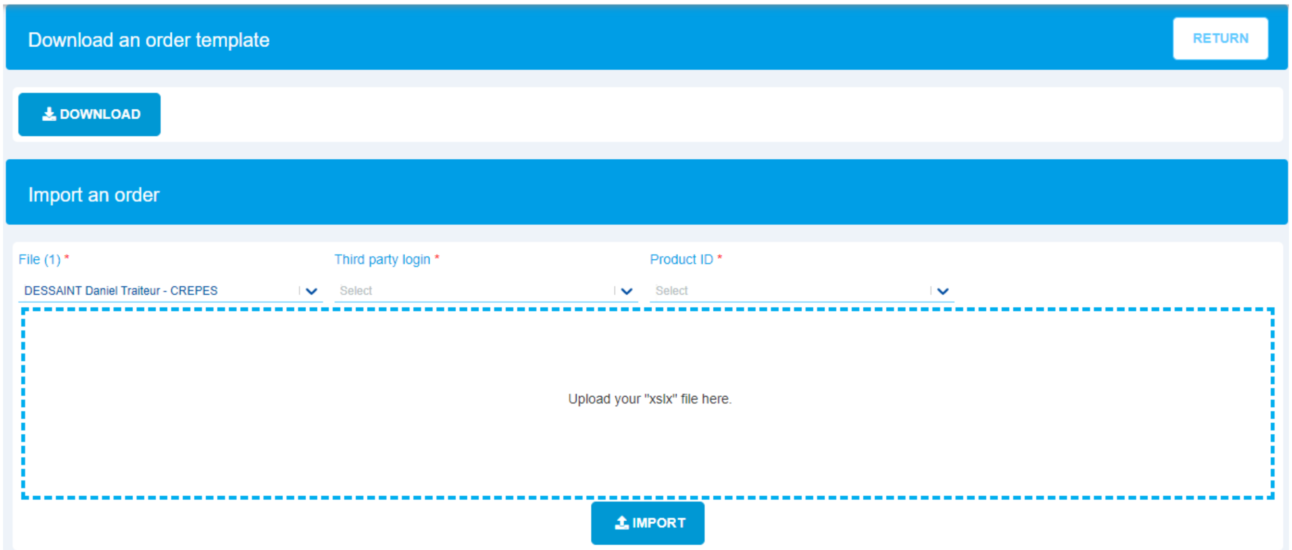
For a file with orders identified by their consignee, the following two examples result in identical import behavior:

REF EXT	DEST	
	D011	
	D011	Commande 1
	D011	
	D012	
	D012	Commande 2
	D012	
	D012	

REF EXT	DEST	
	D011	
		Commande 1
	D012	
		Commande 2

3.4.2 Import procedure

1. Fill in the import data: file, third party and product identifiers
2. Submit your completed file in the appropriate area (use the template available for download if necessary).
3. Launch the import with the validation button.
4. In case of an error, you will be asked to either cancel the import or to continue to make corrections in the application.



3.4.3 Modifying imports

It is possible to filter the order portfolio on imported orders only, so that you can easily edit them in order to complete them or correct errors.

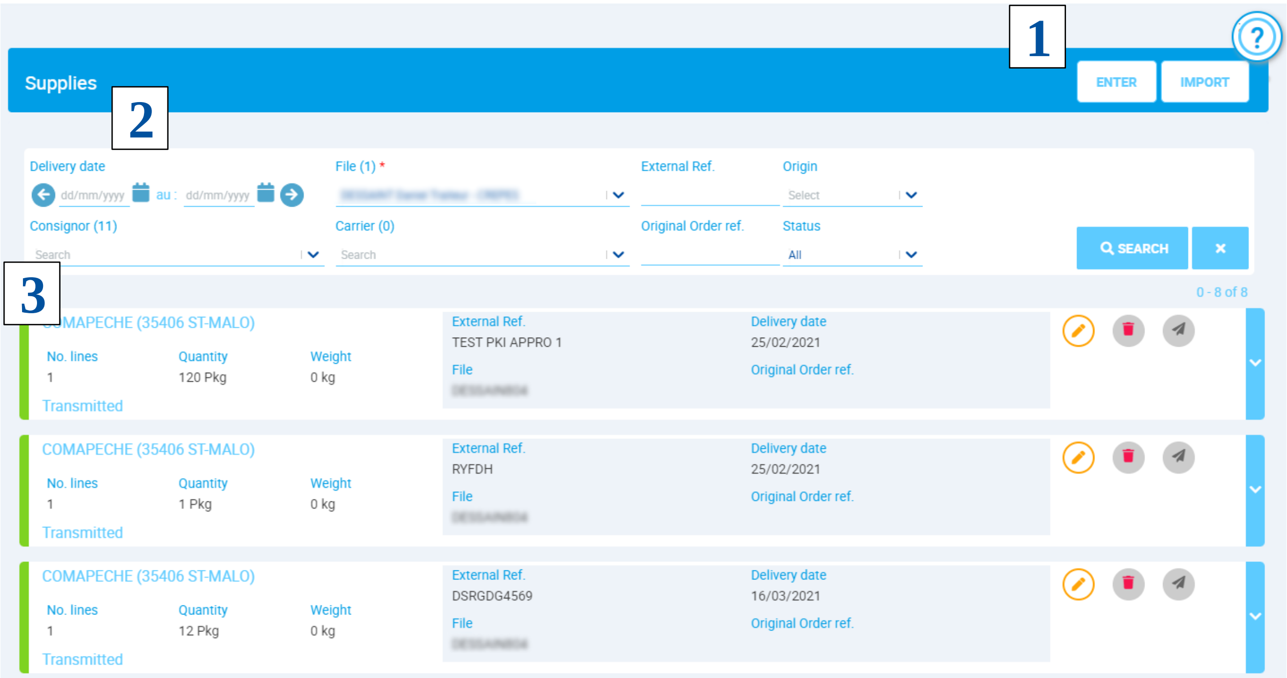
4 Supplies

4.1 *Display of the supply portfolio*

This page is the home page of the module.

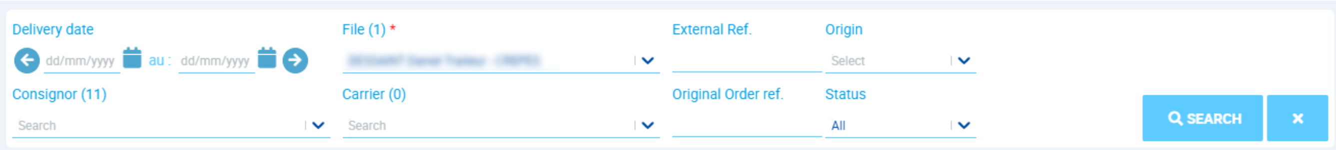
The display of the supply portfolio consists of three areas:

1. The header which contains the links to the pages
    - Entering a new supply
    - Importing a supply
2. The search area that allows access to different criteria and filters.
3. The result area to view the supplies of the file corresponding to the filters from their creation to their validation.



4.2 *Searching for supplies*

4.2.1 Details of the search criteria

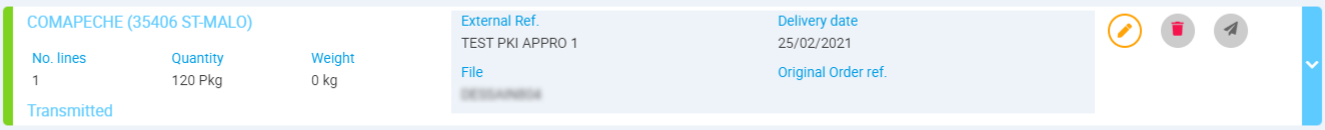


The search always focuses on a single file.

The Origin criterion allows, for example, to filter out supplies that have been imported, in order to modify them.

4.2.2 Viewing the results

Each supply matching the search criteria is displayed as follows:



A coloured border indicates the status of the supplies displayed:

- **Yellow** if the supply is being entered or waiting to be transmitted without inconsistencies.
- **Red** if it contains errors. This status necessarily means that the supply has not been transmitted.
- **Green** when the supply has been transmitted to the warehouse.
- **Grey** from the moment the supply is taken over by the warehouse. From this point, on it is no longer possible to modify the supply.

Information on the supply header

By default the results are displayed in compact mode. It is possible to expand each line of the result in order to display more information about the supply with the button at the end of the line.

Actions on supply

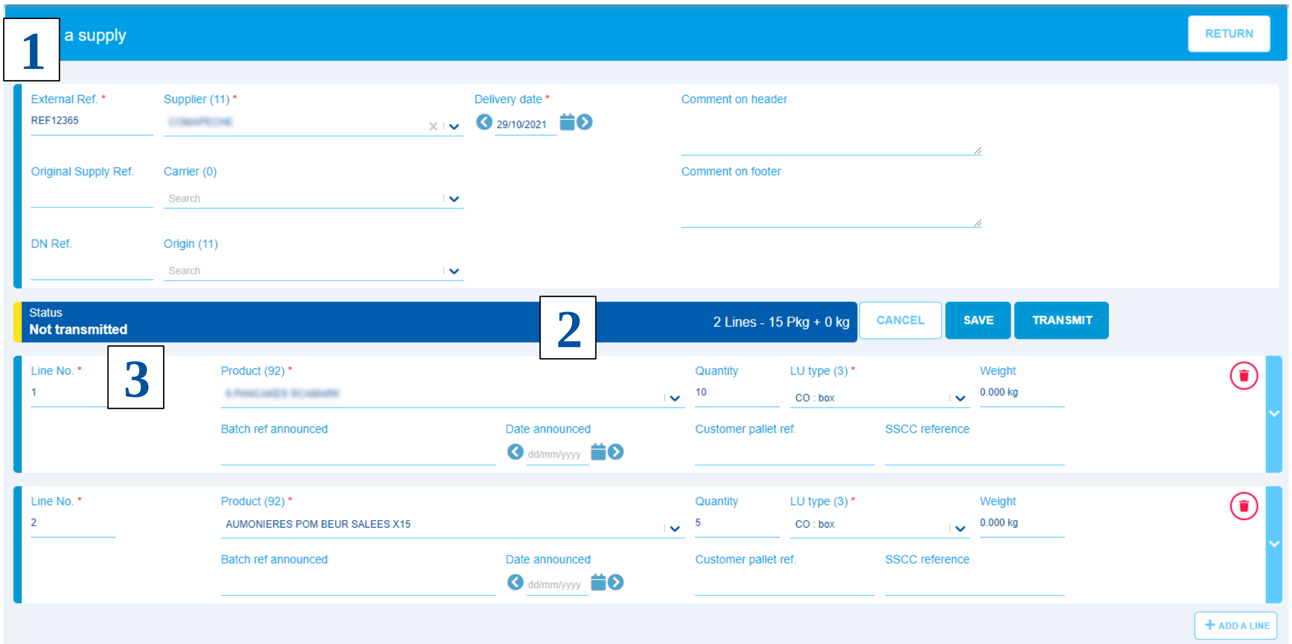
- Access the details of the supply being entered.
- Delete supply
- Send the supply to the warehouse.

These actions are also available from the detail screen.

4.3 *Entering/viewing the details of a supply*

The supply detail view consists of three areas:

1. Header: Identification of the supply, of the third parties involved as well as the dates.
2. Summary of announcement lines + actions
3. Announcement lines



4.3.1 Supply Header

By default the header is displayed in compact mode. It is possible to expand each line of the result in order to display more information about the supply with the button at the end of the line.

Designation	Field
External Ref	Customer reference. Unique identifier for the supply.
Original Supply Ref	Original reference for the supply.
DN Ref	Additional reference on the delivery note.
Supplier	Supplier third party of the supply.
Carrier	Carrier third party of the supply.

Origin	Third party from which the goods originally come.
Delivery date	Delivery date of the supply to the warehouse.
Comment on header	Comment on the header of the supply note
Comment on footer	Comment on the footer of the supply note

4.3.2 Summary of announcement lines & actions

The summary of the announcement lines includes 3 pieces of information:

- The number of lines entered
- The sum of the units entered
- The sum of the weights entered

This information is used to check that the supply is fully entered at the time of transmission.

You can carry out 3 actions on the supply :

- 

Permanently deletes this supply. This action is possible until the supply is taken over by the warehouse.
- 

This action is possible until the supply is taken over by the warehouse.
- 

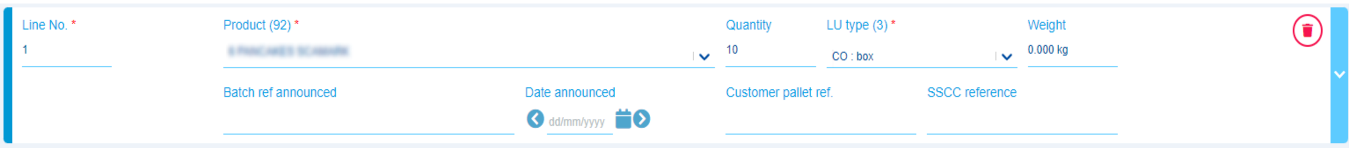
Send the supply to the warehouse. This action is only possible for a supply pending transmission and without errors.

A supply that has already been transmitted to the warehouse can no longer be modified without being transmitted again, which is why only the transmit action is proposed in this situation.

4.3.3 Announcement lines

4.3.3.1 Information

By default the lines are displayed in compact mode. It is possible to expand each line of the result in order to display more information with the button  at the end of the line.



Designation	Field
Line No.	Line number of the supply. Allows lines to be interchanged afterwards.
Product	Product for which the search is based on the following information: designation, alias, EAN13, DUN14
Quantity	Quantity announced in the LU type indicated.

Weight	Weight announced in kg. For a product with a fixed weight, this must correspond <u>exactly</u> to a multiple of the LU requested. For this type of product the announcement in quantity is recommended. For a product with variable weight the quantity is estimated in relation to the average of the accepted weight range..
LU type	Type of Logistics Unit announced.
Batch ref announced	Announced production batch reference.
Date announced	Announced goods-in date. Depending on what is agreed for the product (BBD, production date...)
Customer pallet reference	Customer reference of the announced pallet.
SSCC reference	Reference of the announced pallet
Comments	Comments on receipt.

4.3.3.2 Actions

The actions available on the announcement lines are as follows:

- 

Add a line. This one appears under the last existing line.
-  Delete the line if it is not transmitted or not yet taken over by the warehouse.

4.4 *Importing supplies*

Importing a supply allows to automate the data entry. It is possible to import one or more supplies simultaneously before eventually finalising them in the application.

4.4.1 Accepted file format

The xlsx file extensions are accepted up to 1 MB.

Download the template to see the accepted data format. The format is fixed, i.e. the position and order of the columns is important for the correct interpretation of the data. Please note that order and supply import files contain different information and are therefore organised differently. Make sure you use the right template for the right type of import.

For products and third parties several identifiers are possible.

The information corresponding to the header can be displayed on the first line of each supply or it can be repeated in front of each line.

4.4.1.1 Rejection conditions

A supply is generated if it has at least one imported detail line. In other words, it is not possible to generate empty supplies through import.

A detail line is imported if the product is identified to a minimum.

Information in the wrong format or not recognized is ignored but it is then proposed to cancel or force the import.

4.4.1.2 Multi-supply file

If filled in, the external reference (REF EXT) is used to identify multiple supplies within the same file. If the external reference is not filled in, then a new supply (Approvisionnement) is generated for each change of supplier and origin (FOURNISSEUR) in the file.

For a file with external references, the following two examples result in identical import behavior:

REF EXT	FOURNISSEUR	PRODUIT	
A1111	F011	P001	
A1111	F011	P002	Approvisionnement 1
A1111	F011	P003	
A1112	F011	P004	
A1112	F011	P005	Approvisionnement 2
A1112	F011	P006	
A1112	F011	P007	

REF EXT	FOURNISSEUR	PRODUIT	
A1111	F011	P001	
		P002	Approvisionnement 1
		P003	
A1112	F011	P004	
		P005	Approvisionnement 2
		P006	
		P007	

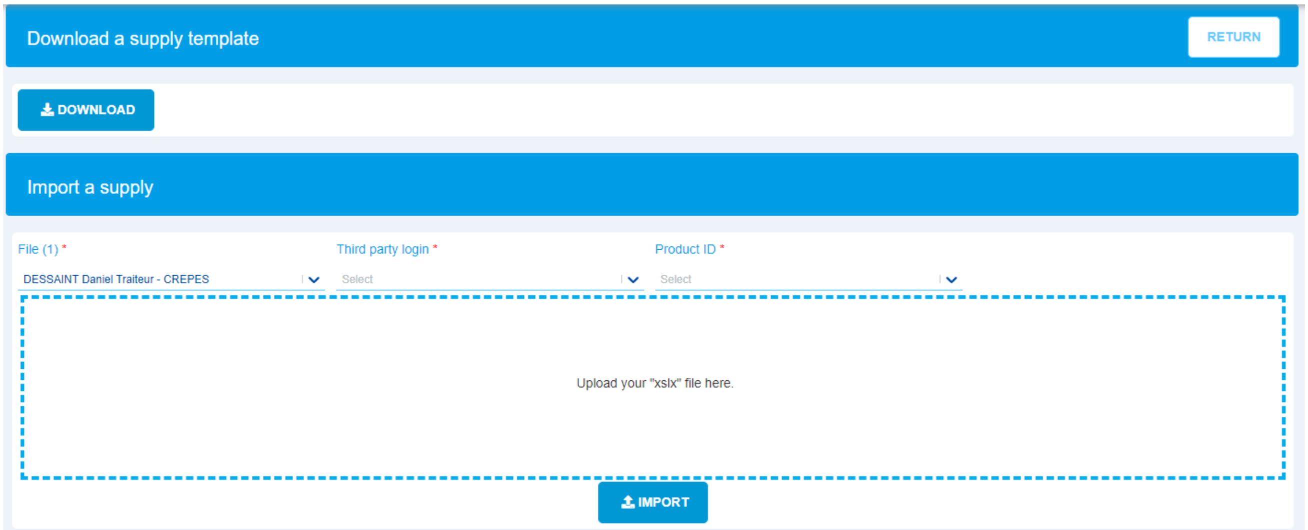
For a file with supplies identified by their supplier/origin pair (FOURNISSEUR PROVENANCE), the following 2 examples generate identical import behavior:

REF EXT	FOURNISSEUR	PROVENANCE	PRODUIT	
	F011	P1	P001	
	F011	P1	P002	Approvisionnement 1
	F011	P1	P003	
	F012	P2	P004	
	F012	P2	P005	Approvisionnement 2
	F012	P2	P006	
	F012	P3	P007	Approvisionnement 3
	F012		P008	

REF EXT	FOURNISSEUR	PROVENANCE	PRODUIT	
	F011	P1	P001	
			P002	Approvisionnement 1
			P003	
	F012	P2	P004	
			P005	Approvisionnement 2
			P006	
	F012	P3	P007	Approvisionnement 3
			P008	

4.4.2 Import procedure

1. Fill in the import data: file, third party and product identifiers
2. Submit your completed file in the appropriate area (use the template available for download if necessary).
3. Launch the import with the validation button.
4. In case of an error, you will be asked to either cancel the import or to continue to make corrections in the application.



4.4.3 Modifying imports

It is possible to filter the supply portfolio on imported supplies only, so that you can easily edit them in order to complete them or correct errors.