

Training Document for Williams Sonoma Vendors

September 2014



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Introduction and Workflow

Williams Sonoma is pleased to announce that GT Nexus will be implemented as the global supply chain collaboration and visibility platform for all upcoming purchase orders. GT Nexus benefits include:

- Electronic delivery of purchase orders and purchase order amendments.
- Real time visibility and reporting to all parties
- Improved communication among all parties, via PO Collaboration
- Reduced processing time, cost and errors
- Full web-based purchase order and purchase order amendment visibility.

Order Collaboration

- Provide a robust solution for Williams-Sonoma to directly manage their Vendors and to enable the replacement of William E. Connor as their agent.
- Provide a method to collaborate with Vendors to negotiate and confirm PO's electronically.
- Provide full audit history of PO acknowledgement and confirmation.
- Automate and track changes to PO's throughout the transaction lifecycle.

Factory Management

- Enable auto assignment of Factory where a single factory is associated to the vendor organization.
- Allow Vendors to assign a single factory to the Purchase Order where multiple factories are available.
- Provide flexibility for the Vendors to change the factory from the currently assigned factory.

Browser Version Impact

The GT Nexus system is built on the latest technology. While the majority of the system is backward compatible with older browsers, the best experience will be seen using the latest stable version of a modern browser.

The following is a list of modern browsers ordered by quality of user experience in the system.

1. Google Chrome - latest stable version (5.0 or later)
2. Mozilla Firefox - latest stable version, either Consumer or Enterprise channel (3.6 or later)
3. Microsoft Internet Explorer 9.0+ (latest version after version 9). Only supported on Windows Vista, Windows 7 or later.
4. Older versions (less than 1 year old) of Chrome, or Firefox give a very comparable user experience to running the latest stable version.
5. Apple Safari - latest stable version. Note that the Factory Management only supports Windows OS.

Note: Using an older browser may result in slower than normal load times, and format anomalies when viewing and printing.

Vendor Expectations

- WSI no longer plays the role of the middle man in PO processing:
 - All Vendors must communicate directly with WSI Inventory Teams via the GT Nexus Platform. (No Emails)
 - All Vendors must negotiate PO changes directly with WSI Inventory Teams.
 - All Vendors must accept PO's in GT Nexus.
- Vendors must respond to a PO within 2 (two) days.
- Vendors must plan for staffing based on having multiple WSI Inventory contacts. There will not be a central contact.
- Vendors should involve their WSI Country representative if:
 - They do not receive a response within 7 (seven) working days from WSI Inventory Teams.
 - They cannot reach consensus on a PO with Inventory after multiple cycles.

Change in Shipping Invoices Submission Process

- Starting June 15, 2014, all invoices and supporting documentation must be submitted via email to the AP Department. (Limit each email to 5MB)
- For WSSPL (Williams Sonoma Singapore) PO's shipping to US, all invoices and supporting documentation must be submitted via email to wssplus@wsgc.com.
- For WSSPL PO's shipping to Alshaya or Australia, all invoices and supporting documentation must be submitted via email to wsspl@wsgc.com.
- Questions regarding Invoices will be sent to :
 - Roy Chong: rchong@wsgc.com
 - Richmond Lim: rlim@wsgc.com

Invoicing

- **ALL** vendors must send WSSPL invoices and required documents in one attachment to:

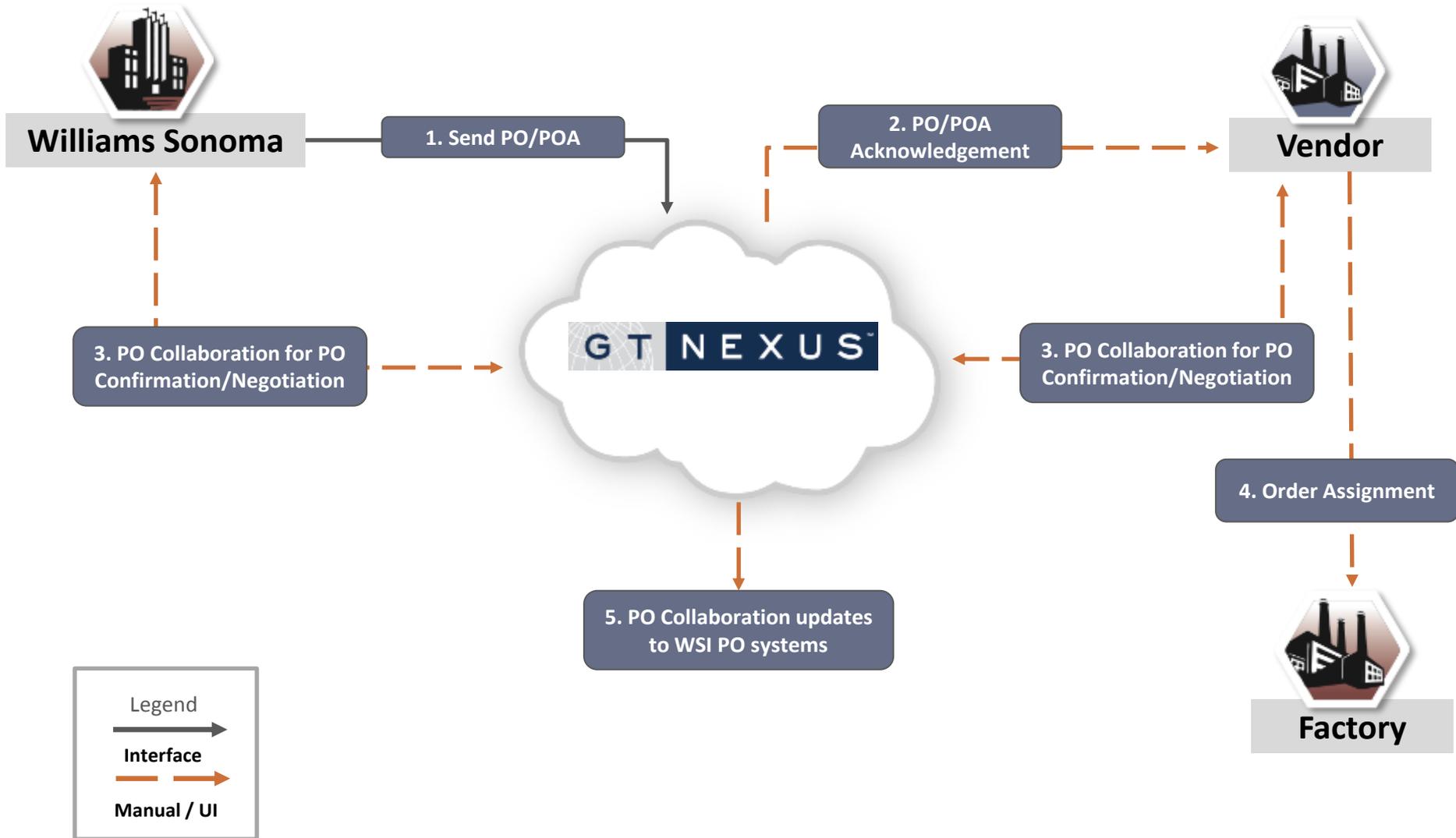
US Shipment	Alshaya / SSI / Australia / UK Shipment
<p data-bbox="195 368 610 405">WSSPLUS@WSGC.COM</p> <p data-bbox="195 472 411 509"><u>Documents:</u></p> <ul data-bbox="195 522 869 851" style="list-style-type: none">■ Commercial Invoice■ Packing List■ Inspection Certificates■ GCC■ Forwarder's Cargo Receipt / Air Waybill	<p data-bbox="998 368 1367 405">WSSPL@WSGC.COM</p> <p data-bbox="998 472 1215 509"><u>Documents:</u></p> <ul data-bbox="998 522 1709 851" style="list-style-type: none">■ Commercial Invoice■ Packing List■ Inspection Certificates■ Certificate of Origin (For Alshaya)■ Forwarder's Cargo Receipt / Air Waybill

- Ensure all Invoices and accompanying documents are clear and legible
- Invoice must clearly state the WSSPL PO number and SKU number
- Invoice must be billed in currency as per WSSPL PO
- Maximum file size per email is 5MB
- Please state your company first name, our purchase order number and your invoice number in the email subject line so we can track the invoice document electronically.

Invoicing

- If replacement parts are provided at no cost, please deduct the dollar amount from the total invoice amount.
- Any invoice without Purchase Order (e.g. sample, liability of cancel POs) should be sent to WSI buyer for approval. WSI buyer will need to return the approved invoice to AP for processing of payment. Vendor should not submit the invoice directly to AP and expect to be paid without approval.
- Please note that invoices not supported by a Williams-Sonoma PO will not be paid.
- Any additional charges associated with POs (LCL charges, handling charges) should be attach with WSI buyer's email approval in advance when vendor submits an invoice.
- If the price on the invoice is higher than the price on the purchase order, AP will issue a debit memo for price discrepancy and deduct it from vendor's payment. Vendors should check the price on Purchase order before they ship/invoice the product. If the price is not correct on the Purchase Order, vendor will need to contact WSI buyer prior to shipment (immediately) and have it corrected.

Williams-Sonoma - GT Nexus Process



Williams Sonoma - GT Nexus Process

1. The Purchase Order (PO) and any subsequent changes (via Purchase Order Amendment (POA)) are sent to GT Nexus from the WSI PO System and are auto acknowledged within GT Nexus.
2. All PO and POA changes are available to the Vendor for their viewing.
3. WSI and Vendors will collaborate to confirm PO's.
4. WSI Local Office Agents will have view access to the PO collaboration platform.
5. WSI will manually update the changes, from the negotiation, in WSI PO System and trigger the update in a Purchase Order Amendment (POA).
6. Factory will be auto assigned where there is only a single factory for a vendor. Manual assignment is required for vendors with multiple factories.
7. The Vendor must confirm all orders and order amendments within the PO Collaboration Worksheet.
8. PO Status will be maintained in Supply Chain Visibility (Pending / Accepted). (Accessible to WSI personal only.)

Log In and the Home Page

How to log into GT Nexus

To log into **GT Nexus** (formerly **TradeCard**), complete the following steps.

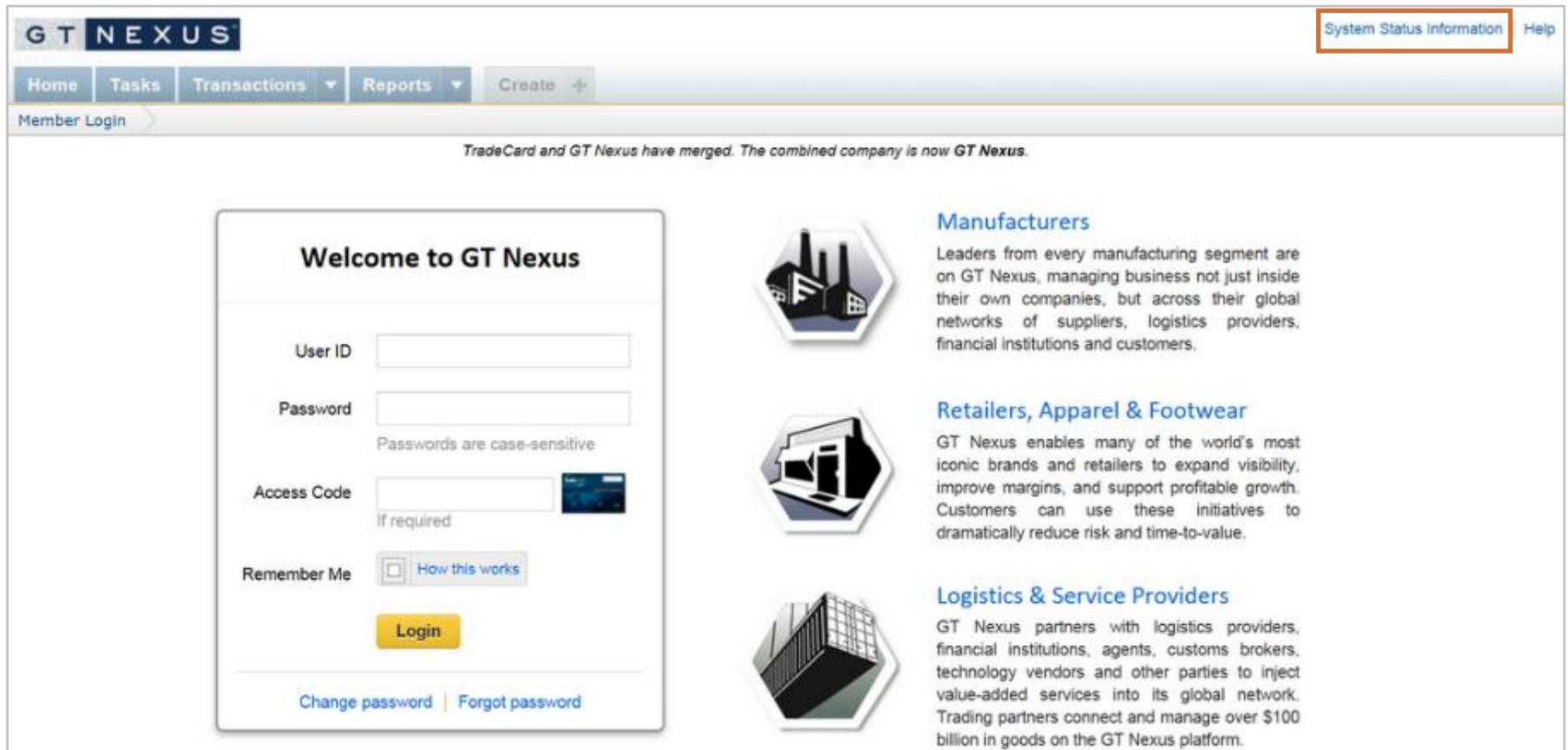
1. Use the www.gtnexus.com link to go to the **GT Nexus** home page.
2. Click **Login**, select **TradeCard Members**. The **TradeCard Member Login** page displays.

The screenshot shows the GT Nexus website homepage. The main heading reads "GT Nexus & TradeCard have Merged". Below this, it states "GT Nexus is Now the World's Biggest Cloud-Based Business Network for Global Trade and Supply Chain Management." and lists three bullet points: "Over \$100 Billion of Goods Managed on the Platform", "25,000 Businesses on the Network", and "100,000 Users Worldwide". The GT NEXUS logo is prominently displayed in the center. In the top right corner, there is a navigation menu with "Login" and "Register" options. A dashed orange box highlights the "Login" dropdown menu, which is open, showing "GT Nexus Members" and "TradeCard Members" options. A dashed orange arrow points from the "TradeCard Members" option in the dropdown to a separate, enlarged view of the dropdown menu on the right side of the image, where "TradeCard Members" is highlighted with an orange border.

About System Status Information

Before logging in, you may select the **System Status Information** link to check the system performance as well as any planned downtimes.

- Easily access and learn the dates of upcoming maintenance times
- Subscribe to **Status Updates** on **Twitter** to receive the latest alerts of the system's service status



The screenshot shows the GT NEXUS user interface. At the top left is the 'GT NEXUS' logo. In the top right corner, a red box highlights the 'System Status Information' link, with a 'Help' link next to it. Below the logo is a navigation bar with 'Home', 'Tasks', 'Transactions', 'Reports', and 'Create' buttons. A 'Member Login' button is on the left. A central message states: 'TradeCard and GT Nexus have merged. The combined company is now GT Nexus.' The main content area features a 'Welcome to GT Nexus' login form with fields for 'User ID', 'Password', and 'Access Code', a 'Remember Me' checkbox, and a 'Login' button. Below the form are links for 'Change password' and 'Forgot password'. To the right of the form are three sections: 'Manufacturers' (with a factory icon), 'Retailers, Apparel & Footwear' (with a laptop icon), and 'Logistics & Service Providers' (with a warehouse icon). Each section contains a brief description of the platform's value for that segment.

System Status Information Help

Home Tasks Transactions Reports Create +

Member Login

TradeCard and GT Nexus have merged. The combined company is now GT Nexus.

Welcome to GT Nexus

User ID

Password
Passwords are case-sensitive

Access Code 
If required

Remember Me [How this works](#)

[Change password](#) | [Forgot password](#)

Manufacturers

Leaders from every manufacturing segment are on GT Nexus, managing business not just inside their own companies, but across their global networks of suppliers, logistics providers, financial institutions and customers.

Retailers, Apparel & Footwear

GT Nexus enables many of the world's most iconic brands and retailers to expand visibility, improve margins, and support profitable growth. Customers can use these initiatives to dramatically reduce risk and time-to-value.

Logistics & Service Providers

GT Nexus partners with logistics providers, financial institutions, agents, customs brokers, technology vendors and other parties to inject value-added services into its global network. Trading partners connect and manage over \$100 billion in goods on the GT Nexus platform.

How to Log into GT Nexus, continued

TradeCard and GT Nexus have merged. The combined company is now GT Nexus.

Welcome to GT Nexus

User ID

Password
Passwords are case-sensitive

Access Code
If required

Remember Me [How this works](#)

[password](#) | [Forgot password](#)

Manufacturers

Leaders from every manufacturing segment are on GT Nexus, managing business not just inside their own companies, but across their global networks of suppliers, logistics providers, financial institutions and customers.

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GT Nexus enables many of the world's most iconic brands and retailers to expand visibility, improve margins, and support profitable growth. Customers can use these initiatives to dramatically reduce risk and time-to-value.

Logistics & Service Providers

GT Nexus partners with logistics providers, financial institutions, agents, customs brokers, technology vendors and other parties to inject value-added services into its global network. Trading partners connect and manage over \$100 billion in goods on the GT Nexus platform.

Enter your User ID and Password

Click Remember Me if you're the sole user for this computer

Note: The first time you log in to GT Nexus, your User ID will be your Password. You will be prompted to change your password at this time.

To log into GT Nexus, complete the following steps (continued).

1. Enter your **User ID** and **Password**.
2. Click **Remember Me** to save your **User ID**, if you're the sole user of this computer.
3. Click **Login**.

Note: An Access Code is not required for Williams-Sonoma.

About Password and Access Code

Welcome to GT Nexus

User ID:

Password:
Passwords are case-sensitive

Access Code: 
If required

Remember Me: [How this works](#)

[Change password](#) | [Forgot password](#)

From: Member Services <defaultsupport@gt.com>
To: 123@test.com
Cc: sarah.huang@gt.com
Subject: Reset Login Password for User: Su

For the attention of **Supplier User**.

For your attention: a new temporary password has been generated and is listed below:

User ID	user@supplierorg
Temporary Password	ApoMiDnVwx
Username	Supplier User

Note: Williams-Sonoma Vendors will not be required to use an Access Code for the use of GT Nexus PO Delivery & PO Collaboration.

If you are an existing member of GT Nexus and share your organizational account among other buyers who do require the Access Code, you will need to use it to log in for Williams-Sonoma transactions as well

Password: A system-generated password is delivered to the first-time user by email. Please check your email to get the temporary password.

How to change your password

The screenshot shows the 'Welcome to GT Nexus' login page with a 'Change Password' section. The form includes the following fields and elements:

- User ID:** Pre-filled with 'user@company'. A callout '1' points to this field.
- Old Password:** A text input field with masked characters and 'Case-sensitive' text below it. A callout '2' points to this field.
- New Password:** A text input field with masked characters and 'Case-sensitive' text below it. A callout '3' points to this field.
- Confirm New Password:** A text input field with masked characters and 'Case-sensitive' text below it. A callout '3' points to this field.
- Access Code:** A text input field with 'If required' text below it. A callout '4' points to this field.
- Login Button:** A yellow button labeled 'Login'.
- Footer:** Links for 'Member Login' and 'Forgot password'.

To change your password, complete the following steps.

1. Enter your **Old Password** (this is your current password).
2. Enter your **New Password** (passwords must be at least 8 characters long).
3. Re-enter your new password in the **Confirm Password** field.
4. Click the **Login** button. The **User Home Page** will appear.

Password Rules:

- The password cannot be the same as the **User ID**.
- The **New Password** must be 8 characters or above and is case sensitive.
- Character sequence is not allowed, ex: abc, 123, xxx, 111)
- The password must have a combination of alpha and numeric/special characters.
- Passwords cannot be reused, the last 10 passwords are remembered.
- The account will lockout after 5 consecutive failed login attempts.
- The system requires all users to change their existing password on the first login and every **90 days thereafter**.
- 30 minutes of inactivity will require user to re-enter their password.
- Password aging, two (2) months of inactivity deactivates the account.
- Passwords are not displayed in the browser window.

Note: An Access Code is not required for Williams-Sonoma vendors.

How to reset your password

Welcome to GT Nexus

User ID

Password

Access Code

Remember Me [How this works](#)

[Login](#)

[Change password](#) | [Forgot password](#)



Welcome to GT Nexus

Password Reset. Instructions will be sent to your email address.

User ID

Access Code

[Reset](#)

[Member Login](#) | [Change password](#)

To reset your password, complete the following steps.

1. Click the **Forgot Password** link.
2. Click **Reset**. The **Password Reset** page displays.

Note: An Access Code is not required for Williams-Sonoma vendors. If you have any issues resetting your password contact your GTN System Admin or the GTN Customer Service Team at service@gtnexus.com.

How to reset your password, continued

From: [Redacted]
To: [Redacted]
Cc: [Redacted]
Subject: Reset Login Password for User: Seller User (user5@sellercorp1)

For the attention of **Seller User**.

This message is to notify you that a new temporary password has been generated and is listed below:

User ID	user5@
Temporary Password	NDDhUGckU4
Username	User

Click the following link and copy and paste the temporary password onto the login page:
<https://training.tradecard.com/en/trade/login?>

This temporary password will be expired at 2012-09-29 05:10:55 GMT. Please login and change your password before it is expired.

Please note that if you have made any subsequent requests to reset your password, this particular password will not work. Note that you will not need to enter an access code until/unless you have received an EID card. To ensure that your account information remains accurate and secure, we notify you whenever this information changes. If you did not make this change, please contact TradeCard Member Services or your local administrator, immediately.

Thank you,

Phone 212 402 1234
E-Mail
Fax

DISCLAIMER:
WHILE THE SYSTEM STRIVES TO ENSURE THAT THE INFORMATION IN THIS EMAIL IS ACCURATE AND TIMELY DELIVERED, WE CANNOT GUARANTEE IT. THE INFORMATION TRANSMITTED IN THIS EMAIL IS INTENDED SOLELY FOR THE ADDRESSEE AND MAY CONTAIN CONFIDENTIAL AND/OR PRIVILEGED INFORMATION. IF YOU ARE NOT THE ADDRESSEE, YOU SHOULD NOT DISSEMINATE, COPY, OR TAKE ANY ACTION UPON THIS INFORMATION. IF YOU RECEIVED THIS EMAIL IN ERROR, PLEASE CONTACT THE SENDER AND DELETE THE MATERIAL FROM ANY COMPUTER.

Welcome to GT Nexus

User ID

Password
Passwords are case-sensitive

Access Code
If required

Remember Me [How this works](#)

[Change password](#) | [Forgot password](#)

To reset your password, complete the following steps (continued).

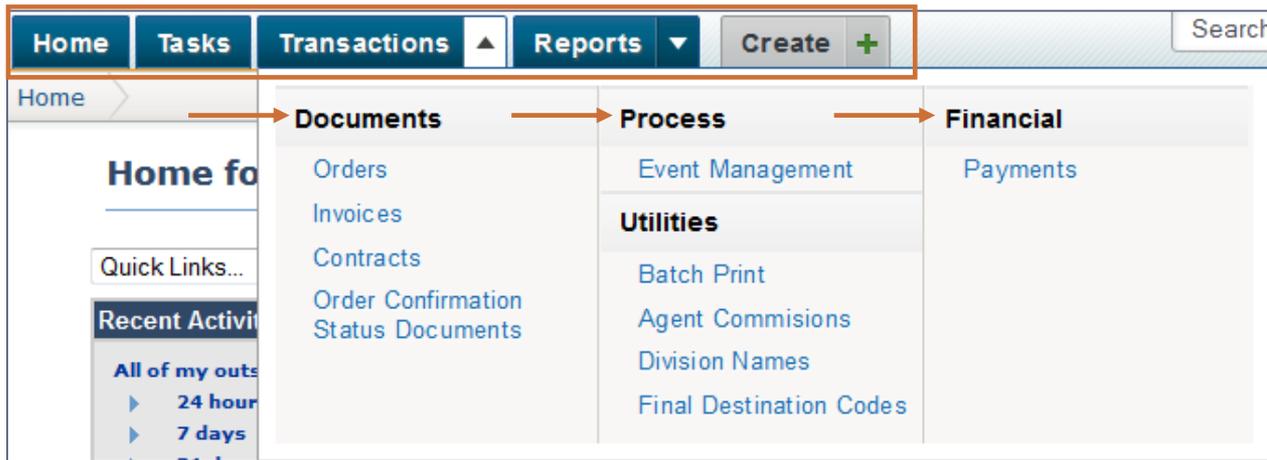
3. A system-generated **temporary password** will be emailed to your email account.
4. Use your **User ID** and **the temporary password** provided in the email to login to the system.

About the User Home Page

The screenshot shows the GT NEXUS User Home Page for Williams-Sonoma, Inc. The page features a navigation bar at the top with tabs for Home, Tasks, Transactions, and Reports, along with a 'Create' button and a search bar. A 'Support and Settings Menu' is located in the top right corner, containing links for Help, Return to Admin, Support, and Settings. The main content area is divided into several sections: 'Quick Links' (with a 'Recent Activities' sub-section), 'Bulletin Board' (with a 'Customize' button), 'Document Search' (with a search bar and a 'Document Search' callout), 'Actions' (with a 'Customize' button and a 'Click the Customize link to make customizations to the specific section.' callout), 'Reports' (with a 'Customize' button and a 'Links to GT Nexus Bulletins' callout), and 'Resources' (with a 'Customize' button and a 'Links to resources, help tools' callout). The page also includes a 'Modify page to start with after Login' dropdown at the bottom.

- The **User Home Page** is the first screen that appears after successfully logging into the system.
- The **User Home Page** contains the Main Menu Table, which provides another means of accessing the system's functionalities. This allows users to view a summary of the available features as you navigate the system.
- Users can customize some of the sections that appear on the **User Home Page** by clicking the applicable customize button.
- Users are able to access general updates in the **Bulletin Board** section as well as buyer community documents (such as buyer training manual, etc.) in the section of **Community Shared Attachments**.

About the Main Navigation Bar



Use the home page to navigate to different areas of the Platform, view your tasks, run reports, search for documents on the platform, and access other resources. You can also customize the home page in a way that works best for you.

Note: The Navigation Bar is context sensitive. Users only see the features they have access to.

Tab	Description
Home	Contains quick-links to access the most common features of the system.
Tasks	Use this page to view and access work that has been assigned to you and your company.
Transactions	Use the dropdown on this tab to view documents or to track the status of your current transactions.
Reports	Use the dropdown on this tab to view available and scheduled reports.
Create	Start a new system transaction such as New Order. (WSI Vendors will not be creating documents)

About Settings

The screenshot displays the GT NEXUS user interface. At the top left is the logo "GT NEXUS". The navigation bar includes tabs for "Home", "Tasks", "Transactions", "Reports", and a "Create +" button. In the top right corner, there are links for "Help", "Return to Admin", "Support", and a "Settings" dropdown menu. An orange arrow points to the "Settings" dropdown, which is open and shows a list of administrative options: My Profile, Company Settings, User List, User Groups, Accounts, Address Book, Community, Task Flow, Match Conditions, Reference Tables, Custom Fields, Platform Console, Integration Console, and Error Log. The main content area is titled "Home for Williams-Sonoma, Inc." and contains sections for "Quick Links...", "Recent Activities", "Bulletin Board", "Document Search", and "Actions".

- **Settings:** The Settings tab in the upper-right corner of the GT Nexus page, is where you will find links to administrative functions such as set-ups, task flow setups, email subscriptions and much more.

Note: Some functions are restricted to Users with Administrator security rights.

About Tasks

The Task List contains all documents that require some type of action. It displays all task assignments. You can use this list to find documents, view actions required, reference information such as order number, who the task is assigned to and when, buyer and seller name, and other document details. In addition, you can bookmark your favorite filters.

Vendors will only see Order Assignment Tasks in the Tasks List.

The Tasks page contains the following information:

- Filters that enable you to manipulate data in a list and produce new lists based on your specific criteria
- A task list that shows the document name, action, reference, assigned to, party, and other details
- Page navigation
- The number of rows to show in the list

About Tasks, continued

Home | **Tasks** | Transactions | Reports | Create +

Search...

Tasks

Williams-Sonoma Vendor 2 Tasks Detail | Summary | Worksheet

Viewing 1 - 6 of 6

To filter the list, enter criteria and click "Refresh"

May 14, 2014 8:59:36 PM UTC

Scope: All Tasks | Filter Text: **SUPERB** | Assigned: | [+ Other Date: / /] | **Reset** | **Refresh**

Document: | Action: | Assigned To: | Look Up | Clear

Use the search filters to narrow your search, then click Refresh.

Document	Action	Reference	Assigned	Party	Details
Order Assignment	Create	PO #: 2041234WER	3 hours ago 2014-05-14 vendor2_sandy	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	
Order Assignment		20484445WER	22 hours ago 2014-05-13 Shadow User	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	
Order Assignment	Create	PO #: 20484444WER	22 hours ago 2014-05-13 wsivendor2	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	
Order Assignment	Create	PO #: 20483333WER	1 day ago 2014-05-13 vendor2_sandy	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	
Order Assignment	Create	PO #: 20480555WER	1 day ago 2014-05-13 vendor2_manura	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	Origins: Williams-Sonoma Vendor 2 Factory 2
Order Assignment		480725WER	1 day ago 2014-05-12 Member Services	Seller: SUPERB CREATION LTD. Buyer: Williams-Sonoma, Inc.	

Click the Action link to go to the Task.

Click to reassign a task to a different user.

Click the Add To Batch button to add the task to a batch.

Reassign Task(s) | **Add To Batch** | **Add To Worksheet**

Page: **[1]**
Rows per page: 50

How to Use Search Options



- Use the **Document Search** option to search for any document saved on the GT Nexus Platform. For WSI transactions only the Order is available on GT Nexus.
- You can also use **Search** or the **Advance Search** link to search for documents based on your specific criteria.
- You may also batch print Orders in PDF from the Document Search option.

The screenshot shows the 'Document Search' results page. It includes a 'SEARCH BY' section with a search input field containing '204844*', a 'Timeframe' dropdown set to 'Created within 5 days', and several checkboxes for search options like 'Exhaustive Search (slow)' and 'Include Archived/Canceled Contracts'. There is a list of document types with checkboxes, including 'Purchase Order' which is checked. A 'Search' button is located at the bottom right of the search criteria section. Below the search criteria, a table displays the search results. The table has columns for 'Select', 'Document', 'Reference', 'Create Date', 'Status', 'Party', and 'Details'. Two results are shown, both for 'Purchase Order' documents. At the bottom right, there is a 'Page 1' indicator and an 'Add to Batch Print' button.

Select	Document	Reference	Create Date	Status	Party	Details
<input type="checkbox"/>	Purchase Order	20484444WER	2014-05-13 22:10:59.651	Active	Buyer: Williams-Sonoma, Inc. Seller: SUPERB CREATION LTD.	Contract Number: 134359453
<input type="checkbox"/>	Purchase Order	20484445WER	2014-05-13 22:32:07.204	Active	Buyer: Williams-Sonoma, Inc. Seller: SUPERB CREATION LTD.	Contract Number: 134359610

How to Use the Batch Print Option

Documents 1 To 2. You have viewed 100% of matches found.

Select	Document	Reference	Create Date	Status	Party	Details
<input checked="" type="checkbox"/>	1 Purchase Order	20484444WER	2014-05-13 22:10:59.651	Active	Buyer: Seller: Williams-Sonoma, Inc. SUPERB CREATION LTD.	Contract Number: 134359453
<input checked="" type="checkbox"/>	2 Purchase Order	20484445WER	2014-05-13 22:32:07.204	Active	Buyer: Seller: Williams-Sonoma, Inc. SUPERB CREATION LTD.	Contract Number: 134359610

Select All Clear All

Page 1

Add to Batch Print

BATCH PRINT LIST

Select	Document	Reference	Create Date	Status	Party	Details
<input checked="" type="checkbox"/>	1 Purchase Order	20484444WER	2014-05-13	Active	Buyer: Seller: Williams-Sonoma, Inc. SUPERB CREATION LTD.	Contract Number: 134359453
<input checked="" type="checkbox"/>	2 Purchase Order	20484445WER	2014-05-13	Active	Buyer: Seller: Williams-Sonoma, Inc. SUPERB CREATION LTD.	Contract Number: 134359610

Select All Clear All Remove

Proceed To Batch Print

Batch Print for Member Services

BATCH PRINT OPTION

Job Name: 2014-05-14_134359009

Output Option

PDF File

Zip File

Email Option

Send a notification by email when it is ready.

Submit

Go To Batch Print List

SELECTED DOCUMENT LIST

Select	Document	Reference	Create Date	Status	Contract Number	Contract Reference	Buyer	Seller
<input checked="" type="checkbox"/>	1 Purchase Order	20484444WER	2014-05-13	Active	134359610		Williams Sonoma, Inc.	SUPERB CREATION LTD.
<input checked="" type="checkbox"/>	2 Purchase Order	20484445WER	2014-05-13	Active	134359453		Williams Sonoma, Inc.	SUPERB CREATION LTD.

Select All Clear All Remove

1. From the **Document Search** screen, select the orders you want to add to the batch print list.
2. From the **Batch List**, select the orders you want to print in PDF.
3. From the **Batch Print Screen** select the option to **Print in PDF** and **Send a Notification by email** when it is ready. Click **Submit**

Purchase Orders and Amendments

Procurement Phase

- Procurement process email notification
- How to search for a purchase order
- How to search for a purchase order amendment
- How to use notes editor
- How to use document history
- Canceled and Closed Purchase Orders
- About the Purchase Order Folder

Purchase Orders (PO) and Purchase Order Amendments

- All Purchase Order and Order Amendments will originate with Williams-Sonoma.
- Upon receiving a Purchase Order or Purchase Order Amendment, the document will run through a series of validations to ensure all required elements of the order document meet both GTN core and WSI custom requirements.
- If any validation errors are found, the Order document will be held in a “New” status until a corrected file is received from WSI. Order documents in a “New” status are not visible to the vendor nor available in the PO Collaboration worksheet.
- PO/POAs which pass validation will be auto activated on behalf of WSI and the assigned vendor. The document status will reflect “Active”.
- PO/POA in an “Active” status are both visible to the vendor and available within the PO Collaboration Worksheet.
- Vendors are requested to subscribe to GT Nexus email notifications and/or utilize scheduled reports to have visibility to when order or order amendments are activated on GT Nexus.

Note: Purchase Order and SKU Numbers

- The WSI PO System number will be used as the Purchase Order number in GT Nexus.
- The WSI SKU number on the PO will be used as the Buyer Item number in GT Nexus.



Purchase Orders (PO) and Purchase Order Amendments

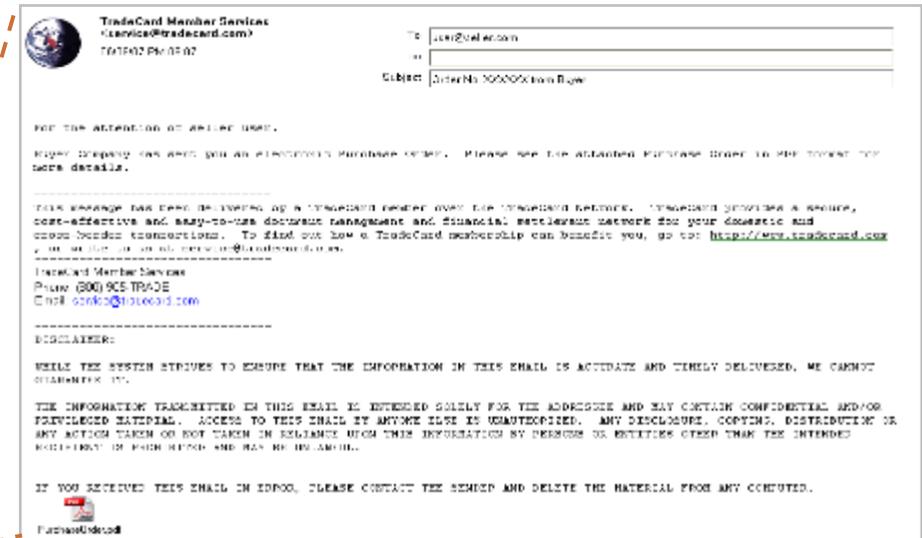
- A Purchase Order Amendment (POA) is a change(s) to an existing Purchase Order (PO).
- If WSI reassigns an existing order to a different Vendor, the original PO will be canceled along with any history. It will no longer be visible to the original vendor. A new PO will be created and assigned to the new vendor.
- Vendors will not have security rights to amend WSI Purchase Orders.
- PO Lines whose quantity is amended to zero will be set to “cancelled” and removed from PO Collaboration.
- A PO PDF is available, Users may view and print the order PDF online from the Order view, or elect to receive an email with the Order PDF from the email subscriptions.
- WSI has designated the following fields as critical. Vendors are required to use PO Collaboration to confirm changes when a POA is issued affecting any of the critical fields.

Critical Fields:			
■ Line Item Quantity	■ MC – Master Case	■ Origin Shipping point	■ Ship Window Start Date & End Date
■ Retail Price	■ Loading Port	■ Country of Origin	
■ PO ETA	■ Item Unit Price	■ Short Description	
■ Ship Method	■ DL – Distribution Lot	■ Invoice Description	

Subscribing to the Order and Order Amendment Email Notification

- All GT Nexus Users have access to an event driven email subscription service which can be configured from the User profile.
- Vendors are requested to subscribe to the **Order Activated** and **Order Amendment Activated** email subscription to receive an email when WSI issues a new PO or a POA which had a change to one or more critical fields.
- Select the option for the email to contain a PDF of the order document.
- The advanced match condition engine may be used to tailor when these email notifications are generated. For example an email advising that a POA has been activated may be limited to only occur when one or more WSI defined critical fields are changed. **(Contact your GT Nexus Service Center for assistance setting up Match Conditions)**

Procurement Events All None	
Selected	Event
<input type="checkbox"/>	Order Amendment Activated Order amendment has reached final approval by bo
<input type="checkbox"/>	Order Amendment Approved By Buyer Order Amendment has reached final approval by th
<input type="checkbox"/>	Order Amendment Canceled Order amendment has been canceled online by a u
<input type="checkbox"/>	Order Amendment Rejected Order amendment has been rejected by an online u
<input checked="" type="checkbox"/>	Order Activated An order has reached final approval by both the bu



Security Rights for Purchase Order Management

- All Williams-Sonoma Purchase Order and Order Amendments are auto approved and activated on behalf of the Vendor.
- Vendors are not permitted to initiate any Order Changes
- NO Security Rights are issued for Purchase Order Management

Note: If a vendor is transacting on GT Nexus with another buyer which requires security rights to manually approve or amend purchase orders, those rights may exist without affecting the WSI workflow.

About the Purchase Order Status

The **Order Status** states the current state of the Purchase Order. Only those status in red are applicable to WSI transactions.

Status	Description
New	The Purchase Order is not yet approved by the buyer.
Active	The Purchase Order is approved by both buyer and vendor.
Canceled	The Purchase Order no longer requires to be executed by the vendor. A Purchase Order can only be cancelled by the Buyer either prior to becoming Active or after. Canceling a PO will create a "Cancelled Version" of the document.
Pending Amendment	The Purchase Order was changed and is in process and not yet approved by the buyer and/or supplier. This is not applicable to WSI Orders as they are auto approved.
Closed	The Purchase Order has reached the end-of-life, it has been fulfilled (partially or in full). Only the Buyer may Close an Order. The Order Folder status will reflect Closed.

Orders

Orders for Williams-Sonoma, Inc. Viewing 1 - 25 of 43 (for last 7 days)

To filter the list, select criteria and click "Refresh".

Legacy View

Order Contract Order Status Order Invoice Status Order Shipment Status Parties Buyer or Seller

Order	Order Status	Order Invoice Status	Order Shipment Status	Contract Ref / ID	Total Amount	Currency	Order Quantity	Latest Date	Seller	Buyer
1114791WSM01	Active	Not Invoiced	N/A	132245622	3,077.00	USD	50	2014-02-21	SIMPLE HUMAN	Williams-Sonoma, Inc.
1114791WSM	Active	Not Invoiced	N/A	132245329	3,077.00	USD	50	2014-02-21	SIMPLE HUMAN	Williams-Sonoma, Inc.
1123253ABC01	Active	Not Invoiced	N/A	132119424	28,293.54	USD	4,788	2014-07-31	EKE	Williams-Sonoma, Inc.

About the Order Folder

Icon / Link Title	Located on the	Displays
Purchase Order Folder Icon 	Order List	Contract page
Purchase Order Number Icon 1123253ABC01	Order List	Purchase Order – Preview page
Purchase Order Folder /Number link 	Breadcrumb trail	Contract page

Use the **Order Folder** to view your contract, that includes all the documents and details related to a transaction. The **Contract** page is displayed when you click the **Oder Folder** icon .

Access the **Purchase Order Amendment** document via the **Order Folder**.

1. Scroll to the **Documents** section.
2. Click the **Purchase Order Amendment** link.

Use the Order Folder to access...

- Purchase Order Details
- Documents
- Destinations

To view documents related to the Order, simply click on the document link you wish to view.

Note: WSI does not use the Contract Number.

Order Folder View

Home Tasks Transactions Reports Create + Search...

Orders Order Folder 20323455USC19 **Breadcrumb trail**

Contract ID 133411424

Contract Reference
Transaction Type **Cross-Border Full Service Transaction (CB-FST)**
Buyer **Williams-Sonoma, Inc.** Status **Open**
Seller **AL-KARAM TEXTILE** Earliest Date **2014-07-10**
Latest Date **2014-07-19** **Order Details**

Invoices Pending **0.00 USD**
Ordered Amount **1,253.50 USD** Payment Authorized **0.00 USD**
Invoiced Amount **0.00 USD** Invoices Rejected **0.00 USD**
Order Balance **1,253.50 USD**

Orders (1) Invoices (0) Payments (0) **Factory Assignment** Items (0) Other **Contract ID: 133411424**

Details For Order 20323455USC19 Display [] Go

Order	Order Status	Order Invoice Status	Order Shipment Status	Assignment	Quantity	Order Amount (USD)	Order Creation Date	Earliest Date	Latest Date	Close Date	Payment	Company Tasks
20323455USC19	Active	Not Invoiced	Not Shipped	133411498	100	1,253.50	2014-05-01	2014-07-10	2014-07-19			View

Documents

Document Name	Status	Next Task To	Last Modified By	Creation Date	History
Purchase Order	Active		GT Nexus	2014-05-01	View
Purchase Order Amendment	Active		Williams-Sonoma, Inc.	2014-05-01	View

Destinations

Destination Name	Receipt Count	Last Receipt Date	Quantities			Balances		
			Received	Ordered	Invoiced	Ordered/Invoiced	Ordered/Received	Invoiced/Received
WSSPL PK SSI Retail	0		0	100	0	100	100	0

Payment Protection

Protection Reference	Protection Level	Transaction ID	Protection Amount (USD)	Status
There are no payment protections matching the filter criteria as this time.				

Invoiced (USD) 0.00 Invoices Pending (USD) 0.00 Payment Authorized (USD) 0.00 Invoices Rejected (USD) 0.00

Invoices

Click the View button to view the documents' history.

How to search for a purchase order (PO)

The screenshot shows the GT Nexus interface for searching purchase orders. The navigation menu at the top includes 'Home', 'Tasks', 'Transactions', and 'Reports'. The 'Transactions' tab is selected, and the 'Orders' sub-tab is also selected. The main content area is titled 'Orders for Seller Co., Ltd.' and contains a search form. The search form has the following fields: Order (with 'sample' entered), Contract, Order Status (dropdown), Order Invoice Status (dropdown), Order Shipment Status (dropdown), Parties (with a 'Look Up' button), Buyer or Seller (dropdown), and Browse days (with '7' entered). There are 'Search' and 'Reset' buttons. A callout box with the text 'Filter purchase orders by placing criteria below' is positioned over the search form. Numbered callouts (1-4) indicate the steps: 1. Click 'Transactions', 2. Click 'Orders', 3. Enter search criteria, and 4. Click 'Search'.

To find a PO, complete the following steps.

1. Click the **Transactions** tab.
2. Click **Orders** under the **Transactions** tab.
3. You may look for the designated POs by typing the Order Number, Contract Number or search by Order/Shipment Status etc. from filters and then click **Search** to retrieve the requested data.
4. If no filter is set, you can simply click **Search** button next to the **Browse days** field and the orders from the past 7 days will be shown on the webpage.

Tips: Change the default value of **7** on the **Browse days** field to whatever timeframe you desired, e.g. **30**, then click **Search** to view purchase orders received in last 30 days.

How to search for a purchase order (PO), continued

Orders for Seller Co., Ltd. Viewing 1 - 3 of 3

To filter the list, select criteria and click "Refresh".

Search Orders **Reset**

Order Contract Order Status Order Invoice Status Order Shipment Status Parties **Look Up**

Refresh

	Order	Order Status	Order Invoice Status	Order Shipment Status	Contract Ref / ID	Total Amount	Currency	Order Quantity	Latest Date	Seller	Buyer
	SAMPLE002	Active	Not Invoiced	Not Shipped	7465200	144,000.00	USD	12,000	2011-06-30	Seller Co., Ltd.	Buyer Inc.
	SAMPLE001	Active	Partially Invoiced	Not Shipped	7469287	62,400.00	USD	9,600	2011-06-30	Seller Co., Ltd.	Buyer Inc.
	SAMPLEORDER	Active	Not Invoiced	Not Shipped	7048121	83,200.00	USD	12,800	2011-02-28	Seller Co., Ltd.	Buyer Inc.

5. Click the **PO number** to go into the PO preview page.

6. Or click the **Contract Ref / ID** or the folder icon  to access the order folder screen.

Note:

- Transaction filtering feature:

You can select criteria for filtering transactions. For example, you may enter a PO number or key word in the **Order** field and then click **Refresh** to search for a specific order. Use the * for the wildcard search. For example, if the PO is 03509990, and you don't type in the leading 0 you won't get a result. If you enter *3509 you would return the PO with the leading 0.

- Order Status:

- **Active**:- PO approved and activated on GT Nexus
- **Cancelled**:- PO is cancelled on GT Nexus

How to Review a Purchase Order

Orders for AAAA Seller Viewing 1 - 22 of 22

To filter the list, select criteria and click "Refresh".

Order Contract Order Status Order Invoice Status Order Shipment Status Parties Buyer or Seller [Reset](#) [Look Up](#) [Refresh](#)

Order	Contract	Order Status	Order Invoice Status	Order Shipment Status	Contract Ref / ID	Total Amount	Currency	Ordered Qty	Latest Date	Seller	Buyer
test-0302-components		New	Not Invoiced	Not Shipped	11998692	\$14,550.00	USD	300	2010-03-12	AAAA Seller	Buyer Test - V310
03012010-Items		New	Not Invoiced	Not Shipped	23456	\$19,500.00	USD	400	2010-03-12	AAAA Seller	Buyer Test - V310

To review a PO, complete the following steps.

1. Click an **Order** number to go to the PO page.
2. There, you will see options given to print the PO page or **download it as a PDF** by selecting the **Print/PDF** button.

Purchase Order - Preview

[Links](#) [Amend](#) [Download](#) [Print / PDF](#)

[Print This Page](#)
[View PDF](#)
[Add to Batch Print](#)

ORDER IDENTIFICATION / TERMS

Order Number	321000179	Issue Date	2008-06-26
Contract ID	4302406	Offer Expiry Date	
Contract Reference	08240		
Incoterm	FOB - KEELUNG (CHILUNG), TAIWAN	Partial Shipments Per Window	NOT ALLOWED
Payment Terms	45 DAYS FROM DELIVERY TERM SATISFACTION		
Payment Initiation Type	AUTO APPROVED PAYMENT	Payment Processing	PLATFORM
Earliest Date		Latest Date	
Variance	5% OVER AND 5% UNDER PER ITEM		

PARTIES

Buyer CM BUYER (5717-9890-1800-4610) P.O. BOX: 297 JEDDAH 21411 SAUDI ARABIA Contact : CM BUYER A WENG	Seller CM SELLER (5717-9890-1800-4618) 70546 STUTTGART . GERMANY Phone : +49711170 Fax : +497111722244
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How to Find a Purchase Order Amendment

Orders for AAAA Seller Viewing 1 - 1 of 1 (for last 30 days)

To filter the list, select criteria and click "Refresh".

[Reset](#)

Order: Contract: Order Status: Order Invoice Status: Order Shipment Status: Parties: Buyer or Seller: [Look Up](#) [Refresh](#)

Order	Order Status	Order Invoice Status	Order Shipment Status	Contract Ref / ID	Total Amount	Currency	Ordered Qty	Latest Date	Seller	Buyer
 ORDER001	Pending Amendment	Not Invoiced	N/A	22531886	\$24,750.00	USD	500	2011-05-31	AAAA Seller	AAAA Buyer

To find a POA, complete the following steps.

1. Click the **Contract Ref/ID** or '📁' of the order to access the order folder screen.
2. The PO and PO amendment documents will be stored in the order details table.
3. Each PO amendment will be stored with the creation date and processing history.
4. Click the **Purchase Order Amendment** link to go to the Amendment preview page.

Orders (1) | Invoices (0) | Payments (0) | Financing (0) | Destinations (1) | Receipts (0) | Misc

Contract ID: 22531886

Details For Order ORDER001 Display [Go](#)

Order	Order Status	Order Invoice Status	Order Shipment Status	Quantity	Order Amount (USD)	Order Creation Date	Earliest Date	Latest Date	Close Date	Payment Terms	Company Tasks
ORDER001	Active	Not Invoiced	Not Shipped	900	\$44,550.00	2011-05-11	2011-05-11	2011-05-31		30 Days from Documents Presentation	Internal: - External: -

Documents [New](#)

Document Name	Status	Next Task To	Last Modified By	Creation Date	History
Purchase Order	Active		TradeCard	2011-05-11	View
Purchase Order Amendment	Active		AAAA Seller	2011-05-11	View

Destinations

Destination Name	Receipt Count	Last Receipt Date
Destination1	0	

Purchase Order Amendment

AMENDMENT IDENTIFICATION

AMENDMENT CREATION DATE: 2009-03-16 AMENDMENT EFFECTIVE DATE: 2009-03-16

AMENDED TERMS

#	Part / Screen	Original Value	Amended To
1	CANCELLATION DATE	2009-07-30	2009-07-30
2	LATEST DATE FOR PO: 221000179, ITEM: 82268566210, VENDOR NITEL: WAAG0011	2008-06-15	2009-06-15
3	LATEST DATE FOR PO: 221000179, ITEM: 82268566210, VENDOR NITEL: WAAG0011	2008-06-15	2009-06-15
4	LATEST DATE FOR PO: 221000179, ITEM: 82268566210, VENDOR NITEL: WAAG0011	2008-06-15	2009-06-15
5	LATEST DATE FOR PO: 221000179, ITEM: 82268566210, VENDOR NITEL: WAAG0011	2008-06-15	2009-06-15

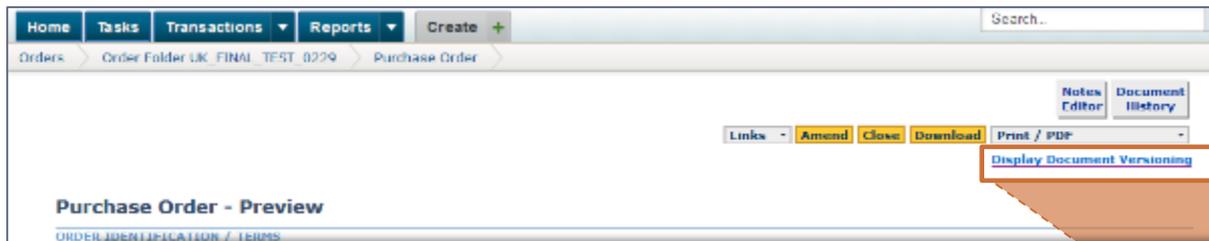
The Document below reflects all of the amendments proposed above.

ORDER IDENTIFICATION

PO # 321000179 Item Date 2008 06 15
Contract ID 4502406 Item / Buyer Date

About Document Versioning

The Display Document Versioning link provides a list of all the changes made to a Purchase Order. It provides the name of the field changed, the Original value and the Changed To value. The Show Details link provides additional information on the change, Party that made the change and the version the change was made to.



CHANGES ON THIS DOCUMENT [Show Details](#) [Hide Document Versioning](#)

Showing changes between version 2 and version 1
(Current version of this document is version 2)

#	Field Name	Original	Changed To
1	ORDER REVISION	55850166	55850167
2	ORDERED ITEM QUANTITY FOR PO: UK_FINAL_TEST_0229, ITEM: 01, 5193628	99,998,888	112,233
3	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 02, 5193629	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
4	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 02, 5193629	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
5	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 03, 5193630	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
6	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 03, 5193630	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
7	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 04, 5193631	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
8	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 04, 5193631	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
9	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 05, 9999999	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
10	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 05, 9999999	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
11	CUSTOM FIELDS	TRANSACTIONNUMBER: 55850166	TRANSACTIONNUMBER: 55850167

Quick View of a WSI Purchase Order on GT Nexus

Notes Editor Search...

Home Tasks Transactions Reports Create +

Orders Order Folder 20323455USC19 Purchase Order

Notes Editor Request Financing Payment Protection Document History

Links Download Print / PDF Display Document Versioning

Available Functions based on Security Rights and Document

Document History

Print / PDF
Print This Page
View PDF
Add to Batch Print

Print/PDF options

Order Identification / Terms section

Parties section

Freight and Order Destination sections

Purchase Order - Preview

ORDER IDENTIFICATION / TERMS

Order Number	20323455USC19	Issue Date	2014-03-06
Contract ID	133411424	Offer Expiry Date	
Order Revision	57490465	Partial Shipments Per Window	ALLOWED
Incoterm	FOB - ANY PORT, UNKNOWN	Payment Processing	OFFLINE - OTHER
Payment Terms	30 DUE LETTER OF CREDIT	Latest Date	2014-07-19
Payment Initiation Type	OFFLINE APPROVED PAYMENT	Brand	PK
Barillet Date	2014-07-10	Department Code	901
Shipment Method	OCEAN	Origin Shipping Point	Karachi
Country of Origin	PAKISTAN	Vendor Notes	PHIL HL14 NEW 25. 04: SSI cancel collection XY
Last PO Update Date Time	2014-04-25T04:08:00.000	Letter of Credit	
Channel	RTL	Division	Pottery Barn Kids-International
Department	PK SHEETING		
Payment Method	Letter of Credit		

PARTIES

Buyer W WILLIAMS-SONOMA, INC. (3717-9590-1502-1337) 3250 VAN NESS AVE. SAN FRANCISCO,, CA 94109 UNITED STATES Contact Name : AMELIA MARTOYO	Seller AL-KARAM TEXTILE (3717-9590-1502-1326) HT/11 LANDHI INDUSTRIAL AREA KARACHI 75120 PAKISTAN
Buyer's Agent CHERRYFIELD Inspection Company NA Origin Of Goods W WILLIAMS-SONOMA VENDOR 2 FACTORY (3717-9590-1502-1341) FLOOR 34 NO 181 ZHONG SHAN EAST ROAD NINGBO, ZHEJIANG 315000 CHINA	Consignee W WILLIAMS-SONOMA, INC. (3717-9590-1502-1337) 3250 VAN NESS AVE. SAN FRANCISCO,, CA 94109 UNITED STATES
Forwarder / Logistics Provider NA Notify Party(s) W WILLIAMS-SONOMA, INC. (3717-9590-1502-1337) 3250 VAN NESS AVE. SAN FRANCISCO,, CA 94109 UNITED STATES	

FREIGHT TERMS

Transshipments	YES
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ORDER DESTINATIONS

Final Destination 1

Quick view of a WSI PO on GT Nexus continued...

LINE ITEMS

Line Item section.
Details the order.

Line #	Buyer Item #	Short Description	Ordered Item Quantity	Unit Price	Cost (USD)
01	3416732	SANTA FLN CSE STD	10 EACH	8.00	80.00
Item Status		OPEN	SKU #	3416732	
Destination		WSSPL PK SSI Retail	Qty per Inner Pack	4	
Earliest Date		2014-07-10	Qty per Outer Pack	4	
Latest Date		2014-07-19			
Vendor's Part Number		VP			
Event Code		HL14 1009			
Invoice Description		PILLOWCASE: 100% COTTON FLANNEL WOVEN PRINTED NAPPED NO EMBELLISHMENT			
HTS1 Number		6302217010			
HTS1 Duty Percent		2.50			
HTS1 Approved Date		20140225			
HTS1 Notes		2.50%			
Critical Field Status		CRITICAL			
OCSDUpdated		NO			
ETA Final Destination Date		2014-08-11			
Do Not Deliver Before Date		2014-07-22			
Retail Price		14.5			
02	3416690	SANTA FLANNEL STD SHAM	10 EACH	8.00	80.00
Item Status		OPEN	SKU #	3416690	
Destination		WSSPL PK SSI Retail	Qty per Inner Pack	4	
Earliest Date		2014-07-10	Qty per Outer Pack	4	
Latest Date		2014-07-19			
Vendor's Part Number		VP			
Event Code		HL14 1009			
Invoice Description		SHAM: 100% COTTON WOVEN			
HTS1 Number		6304920000			
HTS1 Duty Percent		6.30			
HTS1 Approved Date		20140330			
HTS1 Notes		6.30%			
Critical Field Status		CRITICAL			
OCSDUpdated		NO			
ETA Final Destination Date		2014-08-11			
Do Not Deliver Before Date		2014-07-22			
Retail Price		24.5			
03	2956126	FAIRY FLANNEL SS TW	40 EACH	13.95	558.00
Item Status		OPEN	SKU #	2956126	
Destination		WSSPL PK SSI Retail	Qty per Inner Pack	4	
Earliest Date		2014-07-10	Qty per Outer Pack	4	
Latest Date		2014-07-19			
Vendor's Part Number		VP			
Event Code		HL14 2222			
Invoice Description		SHEET SET: 100% COTTON FLANNEL WOVEN PRINTED NAPPED NO EMBELLISHMENT (VENDOR PROVIDE PRICE BREAKOUT ON INVOICE)			
HTS1 Number		6302217010			
HTS1 Duty Percent		2.50			
HTS1 Approved Date		20140304			

Quick view of a WSI PO on GT Nexus continued...

Totals section. states the total amount for the Purchase Order.

TOTALS

Merchandise Total	1,253.50
Total Adjustment	0.00
Total Taxes	0.00
Order Total	1,253.50

REQUIRED DOCUMENTS

COMMERCIAL INVOICE

Vendors may ignore this section as the invoice will NOT be processed through GT Nexus as this time.

ADDITIONAL TERMS

Additional Terms section.

SELLER WILL BE REQUIRED TO CERTIFY THAT IT HAS OBTAINED ALL APPLICABLE AUTHORIZATIONS, APPROVALS, LICENSES, QUOTAS, VISAS, CERTIFICATES OF ORIGIN, AND OTHER DOCUMENTATION TO PERMIT THE EXPORTATION OF THE MERCHANDISE FROM THE COUNTRY FROM WHICH THE MERCHANDISE WILL BE SHIPPED IN COMPLIANCE WITH ALL APPLICABLE LAWS AND REGULATIONS OF THE COUNTRY OF EXPORTATION. SELLER ALSO CERTIFIES THAT IT OR ITS AUTHORIZED AGENT WILL OBTAIN AND PROVIDE ALL OF THE APPLICABLE AUTHORIZATIONS, APPROVALS, LICENSES, QUOTAS, VISAS, CERTIFICATES OF ORIGIN, AND OTHER DOCUMENTATION, AND INFORMATION REQUIRED TO PERMIT IMPORTATION OF THE MERCHANDISE INTO THE DESTINATION COUNTRY IN COMPLIANCE WITH ALL APPLICABLE LAWS AND REGULATIONS IN THE IMPORTING COUNTRY. (Additional documentation required on each invoice)

User	Organization	Action	Version	MessageId	Timestamp (GMT)
Agent User	Williams-Sonoma, Inc.	Approve	1	8026385	2014-05-01 17:13:12 GMT

Details the information of the user(s) who have worked on the PO.
Note: "Agent User" indicates the document was auto approved and activated by the GT Nexus system .

Sample WSI PDF



Williams-Sonoma, Inc.
 3250 Van Ness Ave
 San Francisco, CA, 94109
 UNITED STATES
 Contact: Carlton

PURCHASE ORDER as of Wed May 14 22:35:38 GMT 2014

Contract ID 134361732	Contract Ref	
Order Number 30007638PBR	Issue Date 2014-05-06	Version 41480001

MAIN STREET MANUFACTURING 3031 18T AVENUE COURT SE HICKORY NC 28602 UNITED STATES	No Agent - Domestic	Williams-Sonoma, Inc. 3250 Van Ness Ave San Francisco, CA, 94109 UNITED STATES
Williams-Sonoma, Inc. 3250 Van Ness Ave San Francisco, CA, 94109 UNITED STATES	BYD 23 Wonderland Drive Eastern Creek, 2766 AUSTRALIA	

Incoterm	Partial Shipments Per Window Not Allowed	Transshipments No
Payment Terms 30 Due System Check	Brand PB	Channel RTL
Department PB UPHOLSTERED FURN	Origin Shipping Point Raleigh NC	Payment Method Letter of Credit
Division Pottery Barn - Australia	Shipment Window 2014-05-06 / 2014-05-13	Shipment Method Air
Country Of Origin UNITED STATES	Freight Pay Method	Collect -

Line #	Buyer Item #	Short Description	Quantity	Unit Cost (USD)	Cost (USD)
01	11205	BUC P TB SFA CML	10 EACH	513.00	5,130.00
Destination: SYD Earliest Date: 2014-05-06 Latest Date: 2014-05-13 SubRev/CriticalField/Status: CRITICAL ETA Final Destination: 2014-05-23 Retail Price: 0 Date: Qty per Inner Pack: 1 SKU #: 11205 Qty per Outer Pack: 1					
1 Item Ordered			Total Quantity	10	Merchandise Total
					5,130.00

Totals		Merchandise Amount	5,130.00
		Total Adjustment	0.00
		Total Taxes	0.00
		Order Total	5,130.00

Required Documents

Commercial Invoice

Additional Terms

Seller will be required to certify that it has obtained all applicable authorizations, approvals, licenses, quotas, visas, certificates of origin, and other documentation to permit the exportation of the merchandise from the country from which the merchandise will be shipped in compliance with all applicable laws and regulations of the country of exportation. Seller also certifies that it or its designated agent will obtain and provide all of the applicable authorizations, approvals, licenses, quotas, visas, certificates of origin, other documentation, and information required to permit importation of the merchandise into the destination country in compliance with all applicable laws and regulations in the importing country.

(Acknowledgement required on each invoice)

This document is a summary and does not contain all the terms and conditions applicable to the transaction. The complete document may be accessed on the system.

How to use the Notes Editor

To use the notes editor, complete the following steps.

1. Click **Notes Editor** on the **Purchase Order – Preview** page. The **Purchase Order Notes Editor** page is displayed.
2. Enter your notes in the **Compose** field.
3. Click **Add**. The notes are displayed in the **Notes** section.
4. Click **Close**.

Purchase Order Notes

- To edit purchase order notes, click **Edit**.
- To delete purchase order notes, click **Delete**.
- To email purchase order notes, click **Email Notes**.
- To make your purchase order notes viewable only by your organization, click **Make Internal**.

Notes Editor > Purchase Order – Preview page

Notes Editor

Purchase Order Notes Close

Notes

#	Author Note	Action	Modified On	Delete	Edit
1	Author Name A note has been added to this purchase order. This is for training purposes only.		2011-05-16 14:29:57 GMT-00:00	Delete	Edit

Email Notes

Compose

Make internal (Viewable only by your organization.) Add

Note: Your notes can only be sent to users who have subscribed to the **Document Notes** event. The purchase order notes added in Notes Editor do not appear in the purchase order PDF format.

Note: The Notes Editor character limitation is 256.

How to View Document History

The screenshot shows the 'Purchase Order Amendment - Preview' page. At the top right, there are buttons for 'Notes Editor', 'View Previously Active Version', and 'Document History'. The 'Document History' button is highlighted with an orange box. Below this, there are 'Download' and 'Print / PDF' buttons. The main content area shows 'AMENDMENT IDENTIFICATION' with 'Amendment Creation Date' as 2014-04-11 and 'Amendment Effective Date' as 2014-04-11. Below this is a navigation bar with 'Orders (1)', 'Invoices (0)', 'Payments (0)', 'Financing (0)', 'Destinations (1)', 'Receipts (0)', and 'Other'. The 'Details For Order 1123253ABC01' section contains a table with columns: Order, Order Status, Order Invoice Status, Order Shipment Status, Quantity, Order Amount (USD), Order Creation Date, Earliest Date, Latest Date, Close Date, Payment Terms, and Com. The 'Documents' section has a 'New' button and a table with columns: Document Name, Status, Next Task To, Last Modified By, and Creation Date. A 'View' button is highlighted with an orange box in the 'History' column of the 'Purchase Order Amendment' row. A popup window titled 'Document History - Mozilla Firefox' is open, showing the document's workflow, task events, and audit trail.

Document History - Mozilla Firefox
https://cqa.tradecard.com/en/popup/Document-HistoryPopUp.jsp?originalDocur

Document History

WORKFLOW 132117497

Task Assignment Name	TASK FLOW ROUTING	Approval Mode	STRICT
Task Flow Manager	PO/POA	Highest Required	1
Document	PURCHASE ORDER AMENDMENT	Highest Completed	1
Evaluated On	2014-04-11 22:02:03.523 GMT	Approval Status	COMPLETED
MessageId	7881011		

TASK EVENTS

Assigned To User	Level	Assigned Timestamp (GMT)	Completed By	Level Complete	Completed Timestamp (GMT)
--	--	--	Agent User	1	2014-04-11 22:01:59.811

AUDIT TRAIL

User	Organization	Action	Version	MessageId	Timestamp (GMT)
Agent User	Williams-Sonoma, Inc.	Create	--	7881011	2014-04-11 22:02:02 GMT-00:00
Agent User	Williams-Sonoma, Inc.	Edit	--	7881011	2014-04-11 22:02:03 GMT-00:00
Agent User	Williams-Sonoma, Inc.	Validate	--	7881011	2014-04-11 22:02:03 GMT-00:00
Agent User	Williams-Sonoma, Inc.	Approve	--	7881011	2014-04-11 22:02:04 GMT-00:00

Access the Document History via 2 ways:

1. Click **Document History** button located on the **Purchase Order – Preview** screen. Or
2. In the **Order Folder**, scroll to the **Documents** section, click the **View** button in the **History** column of the **Purchase Order**.

Document – History page you can view

- Workflow
- Tasks Events
- Audit Trail

Cancelled and Closed Purchased Orders Documents

- From the **Transaction** tab, Users may search for **Cancelled** or **Closed** purchase orders by selecting the Cancelled or Closed Status from the **Order Status** filter.
- By default, cancelled or closed orders are not visible when the order status is left blank.

Home Tasks Transactions ▼ Reports ▼ Create + Search...

Orders

Orders for Williams-Sonoma Buyer Agent

To filter the list, select criteria and click "Refresh".

Search Orders

Order Contract Order Status Order Invoice Status Order Shipment Status Parties Look Up Buyer or Seller

Reset Refresh

Order	Order Status	Contract Ref / ID	Total Amount	Currency	Order Quantity	Latest Date	Seller	Buyer
-------	--------------	-------------------	--------------	----------	----------------	-------------	--------	-------

There are no orders at this time with the specified filters.

Browse 7 days Go

Purchase Order Numbers

- The WSI PO System number will be used as the Purchase Order number in GT Nexus.

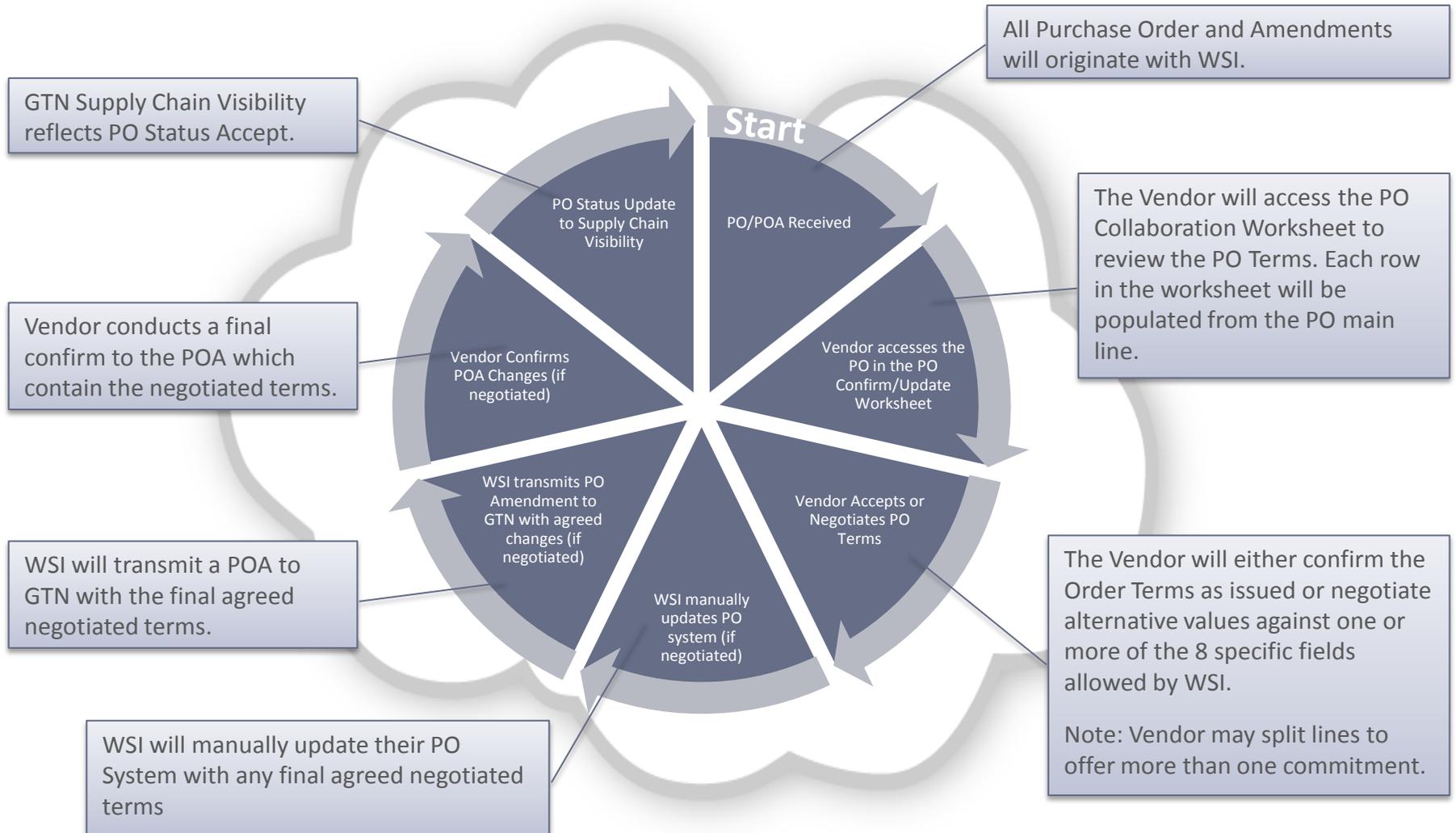
Note: Canceled Purchase Order Documents are not visible on POC worksheets.

PO Collaboration

- About PO Collaboration
- Collaboration Status
- Basic Functionality
- How to access the PO Confirm/Update worksheet
- How to accept/negotiate a PO Line
- Scenarios
- Split Lines
- How to batch approve
- Working offline

About Purchase Order Collaboration

PO Collaboration is a tool for negotiating and confirming purchase order terms, such as delivery dates, price and quantities.



About PO Collaboration

- The GTN PO Collaboration Worksheet enables Vendors to confirm their acceptance or request to negotiate on specific PO Terms as identified by Williams-Sonoma.
- PO Terms (referred to as milestones within the POC Worksheet) available for confirmation/negotiation are:
 - MC – Master Case
 - DL – Distribution Lot
 - Ship Window Start Date
 - Ship Window End Date *(Note: The End Date is calculated as +7 days from the Start Date automatically)*
 - PO ETA
 - Item Quantity
 - Ship Method
 - Item Unit Cost
- The Vendor is required to select a Revision Reason when negotiating on a milestone.
- If the vendor wants to negotiate outside the above mentioned PO Terms, please communicate offline with WSI.
- If the Vendor negotiates on any item, Williams-Sonoma will review the Vendor proposed updates by accessing the PO Collaboration Worksheet online. The WSI User has the option to enter a counter proposal or accept the negotiated items.

About PO Collaboration, continued

- If a counter proposal is entered, the vendor must then review the new changes and again confirm the lines or further negotiate. This process continues until both WSI and the vendor confirm the PO Line Terms.
- Williams-Sonoma can also initiate a PO Negotiation on active orders before the vendor has responded to the original PO with either confirmation or negotiate. To do so the WSI User will open the PO Collaboration worksheet and enter the revised values against the appropriate terms. The vendor will then review to confirm or negotiate the revised terms, not the original which have been superseded.
- Once the PO Line has been confirmed by the Vendor, the line item is locked and closed for further changes by the vendor.
- If a PO Line is negotiated by the vendor, it is locked from further updates by the vendor until WSI responds with a POA to confirm acceptance of the changes, or the WSI User responds with a counter proposal.
- If a Vendor selects “Other” as a Revision Reason, comments explaining what the Other reason is must be entered in the V Comments column.

About PO Collaboration, continued

- Either WSI or the Vendor may use the Split Line feature within the POC Worksheet.
- All Split Lines held under a main line must be confirmed before the main PO line will reflect confirmed.
- Once the negotiation of Split Lines is completed, status “Negotiation Completed”, the WSI User will update the WSI PO System with the Split Lines as separate PO Lines. A new POA will be generated to GTN with the changes. The vendor is required to confirm the changes introduced in the POA.
- Vendors may use the PO Collaboration Work in Excel functionality which enables the Users to perform the collaboration activities offline, then sync back into GT Nexus.

NOTE: Split Lines may not be managed within the Work in Excel function nor are split lines reportable.

About PO Collaboration, continued

- WSI has identified a set of “Critical Fields” which when changed represent a materially important amendment to the Order for which Vendors need to be aware of.
- Vendors are strongly encouraged to subscribe to the POA Activated email subscription to receive an email alert with an accompanying POA PDF showing the changes.

- The following fields are considered Critical Fields. A PO Amendment will be flagged at the header if there is a change to any of the critical fields. Users can subscribe to POA PDFs when a critical field is changed.

Critical Fields:

- Item Quantity
- Ship Method
- Item Unit Price
- PO ETA
- Lading Port
- Origin Shipping Point
- MC – Master Case
- DL – Distribution Lot
- Ship Window Start and End Date
- Country of Origin
- Retail Price
- Short Description
- Invoice Description

- There is 1 collaboration worksheet available.

Worksheet	Description
PO Confirm / Update	This worksheet will load PO Lines for the PO Accept/Negotiation process.

About PO Collaboration – Required Fields

The following field are required by WSI and/or the Vendor when negotiating on the POC worksheet.

Column	WSI	Vendor
Revision Reason	✓	✓
Negotiate	✓	✓
Save	✓	✓
Comments	✓	✓*

- **Vendor Comments** are only required when the Revision Reason is “Other”
However it is strongly recommended that comments are entered any time the reason for the change is not obvious.

Collaboration PO Line Status

Use the Collaboration PO Line Status column to filter, view status changes and determine what actions are required to finalize negotiations.

Collaboration Status	Description	Responsible Party	Action Required
PVR - New	A new PO requiring vendor review and processing.	Vendor	Review the new PO to either confirm or negotiate.
PVR - Negotiate	WSI has Rejected the vendor's proposed changes.	Vendor	Review WSI comments and respond with acceptance or negotiation.
PVR - Critical	POA received in which WSI has a change to a critical PO value (Quantity, Ship Method, Date).	Vendor	Immediate review and response to WSI proposed changes. Confirmation or Negotiation.
PVR – Non-Critical	POA received in which WSI has changed a Non-Critical field.	Vendor	Review WSI changes and respond with confirmation or negotiation
PVR – Retrigger	Allows Vendors to confirm PO Lines when aggregators and milestones consist the same values.	Vendor	Review and confirm the lines.
PWR - Negotiate	Status after the Vendor has made a proposal which now requires WSI review.	WSI	Review Vendor changes and either confirm or negotiate back to Vendor
Vendor Confirmed	Status after the vendor has confirmed the line without any negotiation.	WSI	No Action required. PO Status automatically updated to SCV Views
Negotiation Complete	Status after both WSI and Vendor have agreed to PO Terms following the initiation of negotiation.	WSI	Update PO System with agreed changes and trigger POA to GTN.
Error : Revision Reason Required	Status when the Vendor has updated the negotiation term but not selected a Revision Reason	Vendor	Select an appropriate Revision Reason
Vendor Review Error	Status when an error occurs during vendor negotiation.	Vendor	Review the error and update the worksheet accordingly
WSI Review Error	Status when an error occurs during WSI negotiation.	WSI	Review the error and update the worksheet accordingly

- PVR = Pending Vendor Review
- PWR = Pending WSI Review

Note: The status will update in GTN after 10-15 minutes.

Process for Furniture and Decorative Accessories Orders

- For **Decorative Accessories** orders, vendors should negotiate/confirm the PO through the PO Collaboration process.
- For **Furniture** orders , vendors should:
 - Access the POC worksheet and pull out relevant information from the worksheet to perform the **PPO** process, which is through email/excel negotiation method.
 - Vendors will not perform any negotiation actions for the **Furniture** orders in POC worksheet, leaving the status of these orders as always in "**PVR-NEW**".
 - After and until the Furniture orders are negotiated / finalized via the PPO process, the vendor will then go into the POC worksheet and perform the "**V confirm**" action
 - If the vendor has more than one factory, the vendor can then proceed with the Order Assignment task to assign the order to a specific factory. An amendment will be required to transfer the factory details to Supply Chain Visibility platform.

About Worksheet Basic Functionality

Once you are brought into the **Event Management** Worksheet page, you will find all action icons are placed next to each other on top of the worksheet.

The screenshot displays the 'Event Management' worksheet with the 'PO Confirm' view selected. A toolbar at the top contains several icons: a funnel (Filter), a crossed-out circle (Clear), a save icon (Save), a gear (Settings), and a green Excel icon (Excel). Below the toolbar, a table with columns 'PO #', 'Item #', 'Description', 'UOM', 'Vendor Name', and 'Vendor ID' is visible. A 'Query' button is located under the 'Item #' column. Two orange callout boxes provide details: one for the 'Query' button and another for the toolbar icons.

Action Buttons

Filter: 

Clear: 

Save: 

Settings: 

Excel: 

Reload: 

Action Buttons

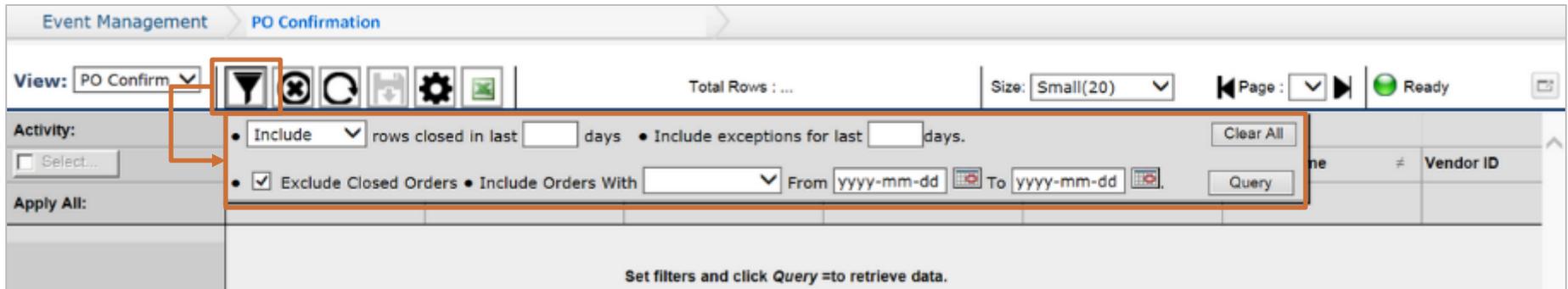
Query:

1.  **Filter:** Header level filters are available under **Filter** icon.
2.  **Clear:** The **Clear** icon removes all column and header filters.
3.  **Save:** The **Save** icon saves changes to worksheet. **Note:** The **Save** icon is presented in disabled state () when data is loaded and will only be enabled () when user makes changes to the worksheet.
4.  **Settings:** **Settings** icon provides pop-up with the options: **Show Columns totals** and **Show Split Screen**.
5.  **Excel :** **Excel** icon downloads worksheet data to Excel.
6.  **Reload:** **Reload** icon will query and load data again. **Note:** If unsaved changes are detected, warning message will be triggered to remind user if proceeds to reload data, changes will be discarded.
7. : Use the **Query** icon to search for data based on the set filters. It is available under all column level filters.

About Worksheet Basic Functionality, continued

- By clicking **Filter** Icon, a pop-up will allow users to further filter the worksheet.

Note: To view **closed** lines, which means to filter out items that have already been confirmed and closed from further update, you must enter a value at **Include rows closed in last xxx days** or specify a timeframe to search from in the worksheet filters to view the closed item. .

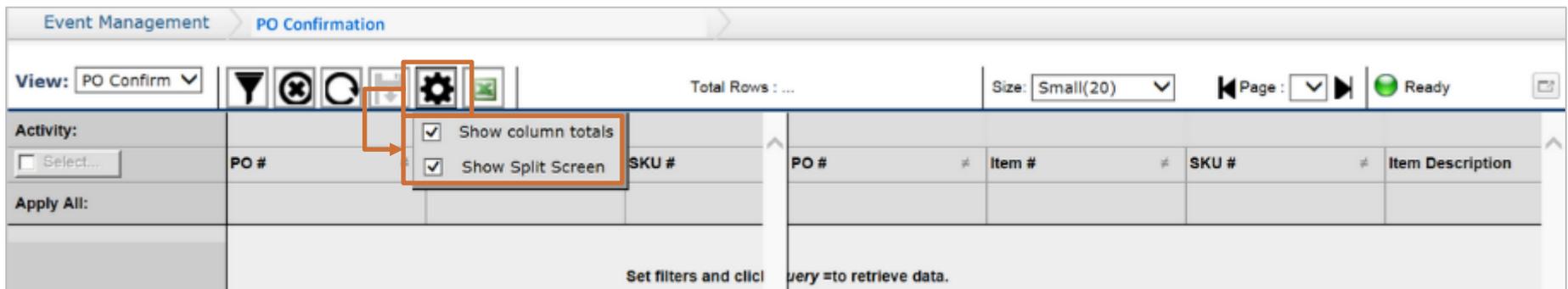


The screenshot shows the 'PO Confirmation' worksheet interface. A filter pop-up is open, allowing users to refine their search. The pop-up includes a 'View' dropdown set to 'PO Confirm', a 'Filter' icon (funnel), and a 'Query' button. The filter settings are as follows:

- Activity:** Select...
- Include:** rows closed in last days • Include exceptions for last days.
- Exclude:** Exclude Closed Orders • Include Orders With From yyyy-mm-dd To yyyy-mm-dd

Buttons for 'Apply All', 'Total Rows : ...', 'Size: Small(20)', and 'Page : < >' are also visible. A 'Ready' status indicator is present in the top right.

- By clicking **Options** icon, a pop-up will allow users to manage the worksheet window:
 - Show column totals:** Checking off the box will cause the total number of rows to be displayed at the top of the window.
 - Show Split Screen:** Check off the box to split the screen to 2 which will allow you to view two parts of a sheet at the same time and apply filters at either screens whenever needed.



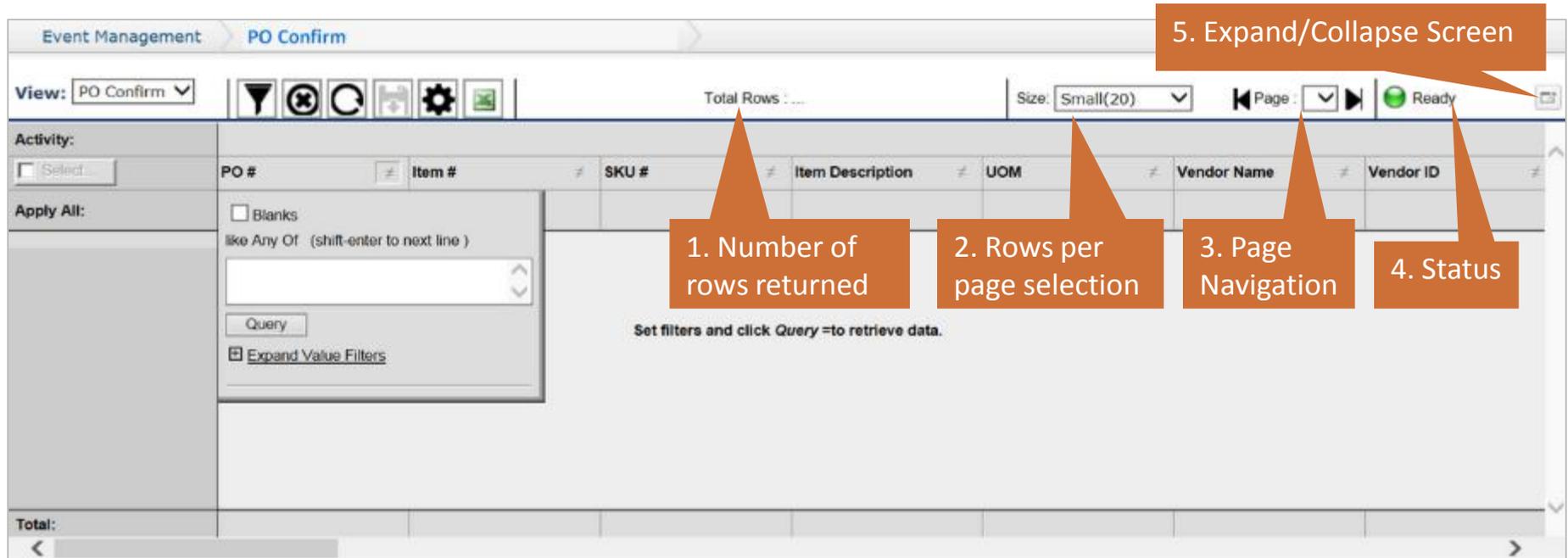
The screenshot shows the 'PO Confirmation' worksheet interface with the 'Options' pop-up open. The 'Options' pop-up includes a 'View' dropdown set to 'PO Confirm', a 'Filter' icon (funnel), and a 'Query' button. The options are as follows:

- Show column totals
- Show Split Screen

The background shows the worksheet with columns for 'PO #', 'SKU #', and 'Item Description'. Buttons for 'Apply All', 'Total Rows : ...', 'Size: Small(20)', and 'Page : < >' are also visible. A 'Ready' status indicator is present in the top right.

About Worksheet Basic Functionality, continued

1. **Totals Row** : Displays total number of rows that a filter query returns.
2. **Rows per Page Selection**: Allows user to define the number of queried rows returned to display on one page.
3. **Navigation Buttons**: Allows users to navigate between pages of rows returned in the query.
4. **Worksheet Query Status**: Displays the worksheet and query status.
5. **Screen Expand/Collapse Icon**  : to hide the upper main navigation and lower information displays to allow for a larger view of the Worksheet.



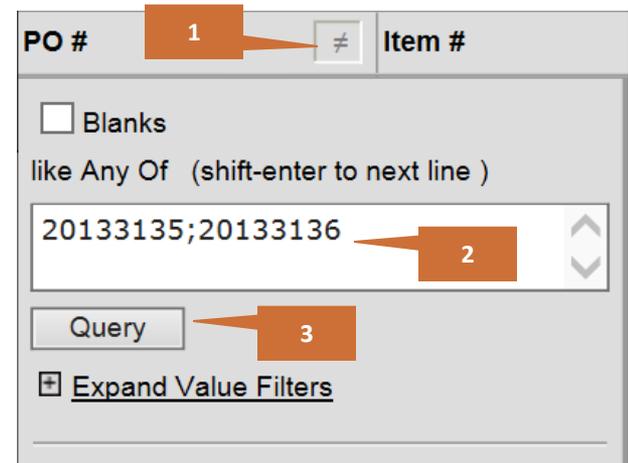
The screenshot shows the 'PO Confirm' worksheet interface. The top navigation bar includes 'Event Management' and 'PO Confirm'. Below this is a toolbar with various icons and a 'View: PO Confirm' dropdown. The main area displays a table with columns: PO #, Item #, SKU #, Item Description, UOM, Vendor Name, and Vendor ID. A 'Total Rows : ...' label is positioned above the table. To the right of the table, there is a 'Size: Small(20)' dropdown, a 'Page: < >' navigation control, and a 'Ready' status indicator. A 'Query' button is located in the bottom left of the table area. Five orange callout boxes point to specific features: '1. Number of rows returned' points to the 'Total Rows' label; '2. Rows per page selection' points to the 'Size: Small(20)' dropdown; '3. Page Navigation' points to the 'Page: < >' control; '4. Status' points to the 'Ready' indicator; and '5. Expand/Collapse Screen' points to the screen expand/collapse icon in the top right corner.

How to Filter Line Data on the Worksheet

To filter line data on the worksheet, take PO# search for example, complete the following steps.

1. Click the \neq icon of the column filter, e.g. **PO#** column.
2. If you have specific values in mind, enter the info, e.g. PO number, in the **Like Any Of** field.
3. Click **Query** or  (Reload) icon to retrieve the search result.

Tip: To use wildcard searching, type an asterisk in front and/or /behind the partial number. For example to Find "11520204", you may type "*0204" then click **Query** or **Reload** icon.



PO # \neq Item #

Blanks

like Any Of (shift-enter to next line)

20133135;20133136

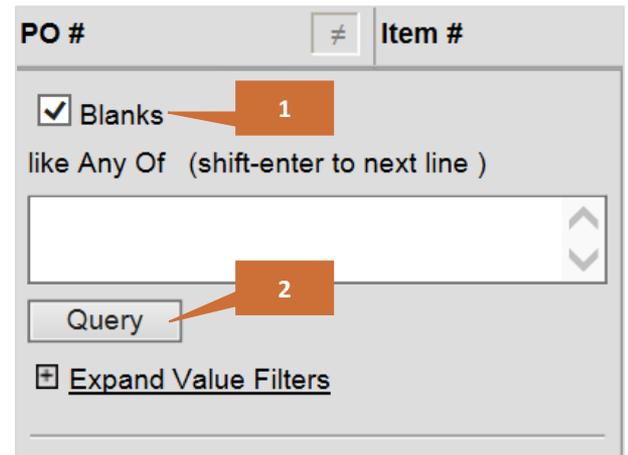
Query

Expand Value Filters

In the event that you want to filter the line data by null value, complete the following steps.

1. Select the **Blanks** check box.
2. Click **Query** or  (Reload) icon to filter out the result with blank value.

Before column filter is applied.	After column filter is applied.
PO # \neq	PO # 
	20133135



PO # \neq Item #

Blanks

like Any Of (shift-enter to next line)

Query

Expand Value Filters

How to Filter Line Data on the Worksheet – Additional Features

If you do not have any specific values in mind, you can use more filter features of the column to search for the data you want:

- 1. Expand Value Filters/Collapse Value Filters:**
 - Clicking **Expand Value Filters** will open up more filter features;
 - Clicking **Collapse Value Filters** will hide the additional filter features.
- 2. Find:** If you have a large set of document numbers in hand to be filtered on the worksheet, you can copy the numbers and paste them into the **Like Any Of** field, then click **Find**. The system will filter all these exact set of numbers and auto-select them. Thus manual entry/selection work can be reduced.
- 3. Time Range Dropdown:**
 - You can click the dropdown list and select a time frame during which the data is sent into the system.
 - Or select **All Unique Values** regardless of the time frame.
- 4.** You can manually select the check box of each value displayed.
- 5. Select All:** Allows you to select all displayed values at once.
- 6. Clear Selected:** Clears all selections.
- 7. Invert:** reverse the selection of items, i.e. if PO #1,3,5 are selected, once you click the **Invert** button, the PO#1,3,5 will be deselected and #2,4,6 will be checked off instead.

The screenshot shows a filter interface for 'PO #'. At the top, there is a 'Blanks' checkbox and a 'like Any Of (shift-enter to next line)' field containing '20133135 20133136'. Below this is a 'Query' button. A 'Collapse Value Filters' checkbox is highlighted with callout 1. A 'Find' button is highlighted with callout 2. A dropdown menu is open, showing 'all unique values.' with a downward arrow, highlighted with callout 3. Below the dropdown, two values are listed with checkboxes: '20133135' (checked, callout 4) and '20133136' (checked). At the bottom, there are three buttons: 'Select All' (callout 5), 'Clear Selected' (callout 6), and 'Invert' (callout 7).

last week of values.
last month of values.
last 3 months of values.
last 6 months of values.
last year of values.
all unique values.

How to Filter Line Data on the Worksheet – Date Range & Exceptions

If the column filter is a **Date** column, you can select a date range to display lines within this time range:

- **Calendar icon:** Clicking the icon helps you to define a date range in which the milestone dates are entered.

The screenshot shows the filter interface for the 'Supplier Delivery Date' column. It includes a 'Blanks' checkbox, an 'Exceptions' dropdown, and 'From' and 'and/or To' date input fields. A calendar icon is highlighted with an orange box, and an arrow points to a calendar window for August 2014. The calendar shows the date '1' (Friday) selected.

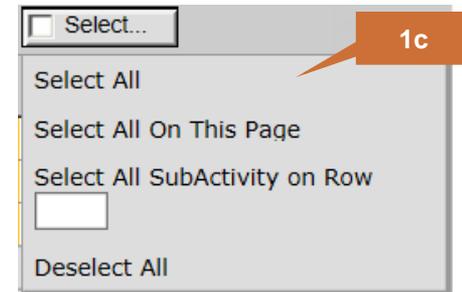
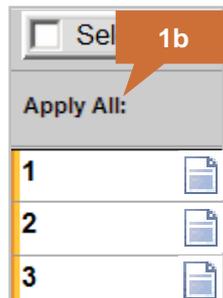
Additionally, you may filter the worksheet lines by using the **Exceptions** filters.

- **Exceptions dropdown:**
 - The **Exceptions** filter allows users to filter milestones columns by exception.
 - The **Exceptions** filter lists all four exception types and an option to search for all. Exception filters include: **Notice, Warning, Critical, Exceeds Expectations** and **ALL**.
 - The **Exception** filter can be used concurrently with other milestone column level filters. Only if all filter conditions are matched will the results be returned.

The screenshot shows the filter interface for the 'Supplier Delivery Date' column. The 'Exceptions' dropdown is highlighted with an orange box, and an arrow points to a dropdown menu showing the following options: All, Exceeds Expectations, Notice, Warning, and Critical.

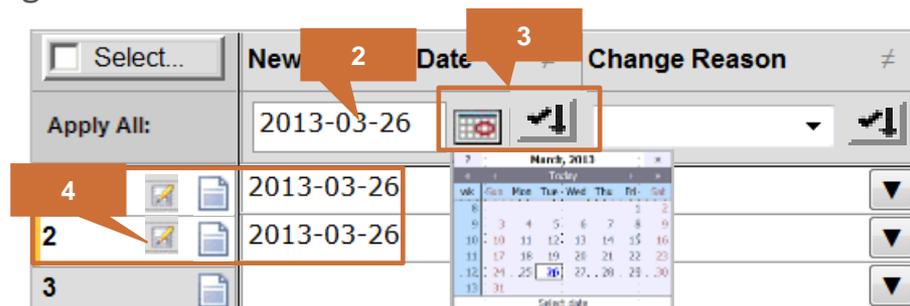
How to Batch Update the Worksheet field

1. There are 3 options to select multiple lines for the batch update:
 - a. Pressing the **CTRL** button on your keyboard and select the rows one by one.
 - b. Selecting the lines by pressing the left mouse button and scrolling over the rows need to be confirmed
 - c. Alternatively, at times you need to confirm ALL the available line items displayed on the worksheet, simply click **Select All** button to have all lines selected or **Deselect All** to cancel your selections.



2. At the top of each enabled row is a editable field for update.
3. Selecting a date from the calendar icon or manually enter a value then click the **Apply Down**  icon.
4. The values are then updated in the selected cells and the  (disc icon) is displayed against the rows to indicate you still must click the **Save** icon to save the changes.

Note: We do not recommend using the **Apply All** feature to update the **Comments** field. Using this feature overwrites any previously entered text. A maximum of 250 characters is allowed in the **Comments** field, including spaces.



About Split Line Functionality – Add Sub Rows

Split Line Functionality enables users to propose order split lines by adding sub-rows on the worksheet.

Example: Supplier proposes quantity and date split by adding sub-rows to a main row.

1. To add sub-rows, click on the “Add sub-row” icon () of a main row.
2. Select **Split Line**.
3. A default number of split lines will be added to the main row.

Note: Once the lines are split, the main row fields will be locked and cannot be edited. All negotiation must be made in the sub-rows’ fields.

Activity:	Incoterm	PO Region	Split Line	Vendor Proposed Ship Method	Vendor Proposed Quantity	Vendor Proposed FCA Date
<input type="checkbox"/> Select... Apply All:						yyyy-mm-dd
1		NA				
2		NA				

Activity:	Incoterm	PO Region	Split Line	Vendor Proposed Ship Method	Vendor Proposed Quantity	Vendor Proposed FCA Date
<input type="checkbox"/> Select... Apply All:						yyyy-mm-dd
1		NA				
2		NA				
3		NA				

Activity:	Incoterm	PO Region	Split Line	Vendor Proposed Ship Method	Vendor Proposed Quantity	Vendor Proposed FCA Date
<input type="checkbox"/> Select... Apply All:						yyyy-mm-dd
1	FOB	NA				

About Split Line Functionality – Add Sub Rows, continued

Example: Supplier proposes quantity and date split by adding sub-rows to a main row, continued

- Supplier enters relevant information on sub-rows. Information entered on the sub-row updates the main row based on aggregation rules.

Once supplier submits relevant information, the sub-rows status is set to 'Pending Buyer Review' for the buyer to review and accept, reject or propose alternative terms.

Activity:		Split Line		
<input type="checkbox"/> Select		Vendor Proposed Ship Method	Vendor Proposed Quantity	Vendor Proposed FCA Date
Apply All				yyyy-mm-dd
1	FOB	NA	450	2014-06-30
		Air	150	2014-06-01
		Ocean	250	2014-06-15
		Truck	50	2014-06-30

Upon the click of split line icon, the main row fields will be locked and not editable.

4

Tips:

- Use the expand () or collapse () functionality to show and hide sub-rows.
- If you click **Select** then enter a number (e.g.1) in the **Select All SubActivity on Row** field, the system will automatically select the designated number (in this case, the first row) of sub-rows from all main rows.

The diagram shows a 'Select...' dropdown menu with the following options: 'Select All', 'Select All On This Page', 'Select All SubActivity on Row', and 'Deselect All'. The 'Select All SubActivity on Row' option is selected, and a text input field next to it contains the number '1'. An arrow points from this input field to the 'Apply All' section of the main interface, where the first sub-row is highlighted. Another arrow points from the 'Select...' dropdown to the 'Apply All' section. A separate callout shows the expand/collapse icons with a '1' in a box pointing to the first sub-row.

About Split Line Functionality – Remove Sub Rows

Example: Supplier removes sub-row(s) from a main row.

1. To remove a sub row from a main row, click  icon of the designated sub row then click on the pop-up **Split Line** icon.
2. The removed sub row will then be grey out and locked from editing. Once you click **Save**, the removed sub row will no longer be visible in the worksheet.

Activity:		Incoterm		PO Region		Split Line		Vendor Proposed Ship Method		Vendor Proposed Quantity		Vendor Proposed FCA Date	
Select...		Incoterm		PO Region		Split Line		Vendor Proposed Ship Method		Vendor Proposed Quantity		Vendor Proposed FCA Date	
Apply All:												yyyy-mm-dd	
1			NA							450			2014-06-30
						Ocean				250			2014-06-01
						Air				150			2014-06-15
						Truck				50			2014-06-30

1a points to the Split Line icon in the sub-row toolbar.

1b points to the Split Line pop-up menu.

Activity:		Incoterm		PO Region		Split Line		Vendor Proposed Ship Method		Vendor Proposed Quantity		Vendor Proposed FCA Date	
Select...		Incoterm		PO Region		Split Line		Vendor Proposed Ship Method		Vendor Proposed Quantity		Vendor Proposed FCA Date	
Apply All:												yyyy-mm-dd	
1		FOB	NA							200			2014-06-30
						Ocean				250			2014-06-01
						Air				150			2014-06-15
						Truck				50			2014-06-30

2 points to the Split Line icon in the sub-row toolbar.

A dashed orange line is drawn across the sub-rows (Ocean, Air, Truck) to indicate they are locked and greyed out.

Scenario 1: Vendor Confirms the Original PO Lines (Status = Vendor Confirmed)

The screenshot displays the 'PO Confirm/Update' interface. At the top, there are navigation tabs for 'Event Management' and 'PO Confirm/Update'. Below this, a 'View:' dropdown is set to 'PO Confirm / Update'. A toolbar contains icons for filtering, deleting, refreshing, saving, and settings. The main table has two rows of data, both with a status of 'Vendor Confirmed'. A callout box labeled '1' points to the first row. A callout box labeled '2' points to the 'V Confirmed' column. A callout box labeled '3' points to the 'Save' button. A dropdown menu for the 'Status' column is open, showing 'Vendor Confirmed' as the selected option. A text box explains that the PO Line Item Status changes based on the collaboration status.

Activity:	Status	V Confirmed	WSI Negotiate	WSI Shipment Method	WSI Proposed Q
1	PVR - Non-Critical	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	PVR - Non-Critical	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

PO Line Item Status changed based on your collaboration status.

Status

- Vendor Confirmed
- Vendor Confirmed

For each PO line, vendors can either accept the terms without proposing any changes or negotiate the terms with WSI.

To confirm the PO without negotiating, complete the following steps.

1. After filtering out the designated PO lines, click to select the lines.
2. Review all relevant PO Details. If the PO Line is accepted, check off the select box in the **V Confirmed** column and click **Apply down** icon to confirm all the selected lines. You may also check of each row independently.
3. Click the **Save** button. The **Status** column will display the selected lines as **Vendor Confirmed**. The lines will be locked preventing further changes and will be set **Closed**. No further action required for these lines.

Note: For **Furniture** orders, once vendors completed the PPO negotiation process (email/excel negotiation), vendors should access this worksheet and select the **V confirmed** columns for Furniture orders.

Scenario 2: Vendor Negotiates the PO Lines (Status = PWR – Negotiate)

Event Management > PO Confirm/Update Form / Update

View: PO Confirm / Update

Activity: Select...

Apply All:

	Status	Item	Model	V New Ship Window End Date	V New PO ETA	Revision Reason	V Co
1	PVR - Non-Critical	PB	RTL	2014-08-04	2014-08-04	Consolidation	
2	PVR - Non-Critical	PB	RTL	2014-08-04	2014-08-04	Consolidation Opport	

Total Rows: 2

Size: Small(20) Page: 1 Ready

PO Line Item Status will change to PWR – Negotiate once saved.

Example of Vendor Ship Window change Proposal

Change Reason for vendor proposal

V Negotiate

To negotiate one or more milestones on the PO Lines, complete the following steps.

1. After filtering out the designated PO lines, click to select the lines.
2. Enter new values in one or more of the Milestones. (See next slide for illustration)
3. Select a **Revision Reason** from the dropdown menu.
4. Check off the select box in **V Negotiate** column and click **Apply down** icon to apply the same changes to the selected lines.

Note: Only use the **Apply Down** icon if you want to bulk apply the same changes to multiple items.

5. Click the **Save** button. The **Status** column will display the selected lines as **PWR - Negotiation**. WSI will then review the changes:

- If the changes are accepted by WSI, the line **Status** will become **Negotiation Completed**. Lines will be locked to prevent the Vendor from proposing further changes. WSI will send a POA to update the original PO and the Status will change to “PVR – Critical” or “PVR – Non Critical”, depending on whether the changed fields are critical fields or not. Vendor is required to select “V Confirmed” to confirm the line, so that the Line can be closed.
- If WSI offers a counter proposal, the line **Status** will be changed to “**PVR – Negotiation**” for further negotiation.

Scenario 2: Vendor Negotiates the PO Lines (Status = PWR – Negotiate)..... Continued

- WSI User may either check off the **WSI Approve** box for each PO Line to confirm the vendor proposal is accepted.
- Or enter a counter proposal against one or more of the milestones.

Event Management > PO Confirm/Update: PO Confirm / Update

Views: PO Confirm / Update

Total Rows: 2

Size: Small(20) Page: 1 Ready

Activity:	V Shipment Method	V Proposed Qty	V New MC	V New DL	V New Ship Window Start Date	V New Ship Window End Date	V New PO ETA	Revision Reason	V Comments
1	Air	100	100	100	2014-08-04	2014-08-04	2014-08-04	Consolidation	Demo
2	Air	100	100	100	2014-08-04	2014-08-04	2014-08-04	Consolidation Opport	Demo

REMINDER - Edits are not saved if the disc icon remains against the PO Line. Be sure to click the save button before exiting the screen

Vendor Proposed milestone edits

Vendor comments should be entered to explain the reason for the proposal. Only required if the Addtl V Proposed PO Changes is used.

Activity:

Select...

Apply All:

Item Status	V Proposed Cost
1	Open
2	Open

Vendor comments should be entered to explain the reason for the proposal.

Scenario 3: Vendor Agrees to Negotiated PO Lines (Status = Negotiation Complete)

- If the vendor negotiated lines and WSI offered a counter proposal, the vendor can either respond with a counter proposal of their own by updating the milestones once more, or confirm their agreement to WSI's offer.
- To confirm negotiated lines, the vendor will update their milestones to match that of WSI, then check off the confirm check box and save. The Status will then change to "Negotiation Complete"
- WSI will then update their PO System and issue a POA. The Status of the PO line will become "PVR – Critical" or "PVR – Non Critical", depending on whether the changed fields are critical fields or not. The vendor must select "V Confirmed" check box as a final confirmation, so that the line can be closed.

V New Ship Windo...	V New Ship Windo...	V New PO ETA	Revision Rea	WSI New Ship Win...	WSI New Ship Win...
yyyy-mm-dd	yyyy-mm-dd	yyyy-mm-dd			
2014-08-27	2014-09-03		Cost Incorre	2014-08-25	2014-08-30
			Other		

Vendor milestones must match the WSI milestones to complete the Negotiation

PO Lines which were Negotiated by vendor and agreed to by WSI will reflect a status of Negotiation Complete once both parties confirm.

Status
Negotiation Complete

Scenario 4: Vendor Confirms PO Lines with Status of PVR - Retrigger

When you see the PO Line Status is "PVR - Retrigger", you will find that the Vendor's negotiated values are exactly the same as the corresponding PO fields. See below screenshot as an example: **V New Ship Window Start Date/End Date = 2014-10-30/2014-11-06**, which is the same as **Ship Window Start/End** on the PO; however, the lines are not closed where they are supposed to. In this case, you will need to select the "V Confirmed" check box, so that the PO line can be confirmed and closed.

Refer to the next slide to learn how to filter and confirm PO Lines with Status of "PVR-Retrigger".

The screenshot shows the 'PO Confirm/Update - PO Confirm / Update' window. A dropdown menu for 'Status' is open, showing four entries: 'PVR Retrigger', 'PVR Retrigger', 'PVR Retrigger', and 'PVR Retrigger'. Below the menu, a table displays PO lines with columns for 'Ship Window Start', 'Ship Window End', 'PO ETA', 'V New Ship Window Start Date', 'V New Ship Window End Date', and 'V New PO'. The table data is as follows:

Activity	Ship Window Start	Ship Window End	PO ETA	V New Ship Window Start Date	V New Ship Window End Date	V New PO
1	2014-10-30	2014-11-06	2014-12-17	2014-10-30	2014-11-06	
2	2014-10-30	2014-11-06	2014-12-17	2014-10-30	2014-11-06	
3	2014-10-30	2014-11-06	2014-12-17	2014-10-30	2014-11-06	
4	2014-10-30	2014-11-06	2014-12-17	2014-10-30	2014-11-06	

Annotations in the screenshot include a dashed orange box around the 'Status' dropdown, an orange box around the 'Ship Window Start' and 'Ship Window End' columns with the label 'Corresponding PO Fields', and another orange box around the 'V New Ship Window Start Date' and 'V New Ship Window End Date' columns with the label 'Vendor Negotiated Values'. An equals sign is placed between the two columns to indicate they contain the same values.

Note: If you decide to further negotiate the milestone values when the **Status=PVR Retrigger**, simply follow the steps outlined on **Scenario 2** to resume negotiate with WSI.

Scenario 4: Vendor Confirms PO Lines with Status of PVR – Retrigger, continued

The screenshot shows the 'Event Management' interface for 'PO Confirm/Update - PO Update'. The table displays 9 rows of PO lines. The first six rows have a status of 'PVR Retrigger'. Callout 1 points to the filter icon in the 'Status' column header. Callout 2 points to the selection icons (green arrows and folder icons) in the first column. Callout 3 points to the 'V Confirmed' checkbox in the 'V Confirmed' column header. Callout 4 points to the Save icon in the toolbar.

Activity:	Status	Brand	Channel	V Confirmed	WSI Negotiate
1	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>
2	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>
3	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>
4	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>
5	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>
6	PVR Retrigger	PB	DTC	<input type="checkbox"/>	<input type="checkbox"/>

To confirm the PO lines with “**PVR- Retrigger**” status, complete the following steps.

1. Filter the **Status** column with “**PVR – Retrigger**”. Tip: If you have a specific PO number in mind, you can use filter combinations, i.e. Status + PO Number, to search for the specific PO line with **PVR – Retrigger** status.
2. Select the PO lines.
3. Select **V Confirmed** check box and click the Apply Down icon.
4. Click the **Save** icon.
5. The **Status** column will be changed to “**Vendor Confirmed**”, meaning the lines will be confirmed/closed, and locked for further edit.

How to reopen a closed PO Line

- In the case where a Vendor confirms a PO Line in error, and the PO Line has a status of “Vendor Confirmed”, the vendor can contact WSI and request the closed line be reopen. The status must be “Vendor Confirmed”.
 - Reopening a closed line will open all milestones for negotiation.
 - It will also update the status of the line from “Vendor Confirmed” to “PVR – New”

For Example:

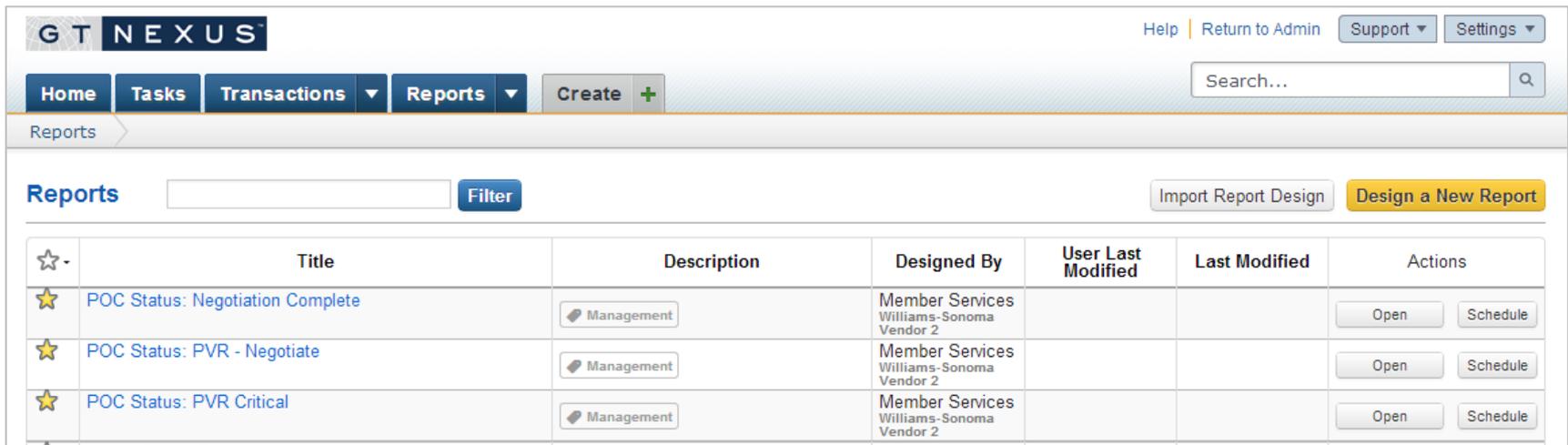
1. Vendor, mistakenly confirms the PO Lines.
2. Line Status changes to “Vendor Confirmed” and line closes.
3. Vendor must contact WSI.
4. WSI must log into GT Nexus and access the Worksheet.
5. WSI User reopens the line by unchecking the “Closed’ checkbox.
6. The line reopens for the vendor and the line status changes from “Vendor Confirmed” to “PVR – New”.

About Split Lines

- WSI can split a PO Line(s) to propose alternative dates, quantities, etc. for an original PO Line.
- Vendors can add multiple splits within the same line as well as splits on multiple lines.
- The split line would be negotiated in its entirety and would be sent to WSI at the time all sub-rows are confirmed
- Any “Negotiation Complete” split lines would be updated in the WSI PO System as separate PO lines and retriggered to GT Nexus

Using Reports to monitor Vendor Required Actions for PO Collaboration

- When there is a pending PO Collaboration action for the Vendor to perform, those actions are not tracked for display in the Task view as with an Order Assignment task described later in this document.
- Vendor Users will use GT Nexus Reports to monitor when a PO Line is in “PVR - New”, “PVR – Negotiate”, PVR – Critical”, “PVR- Non Critical”, or “Negotiation Complete” status.
- Users may run the reports on demand or schedule them to be delivered via email one or more times a day.



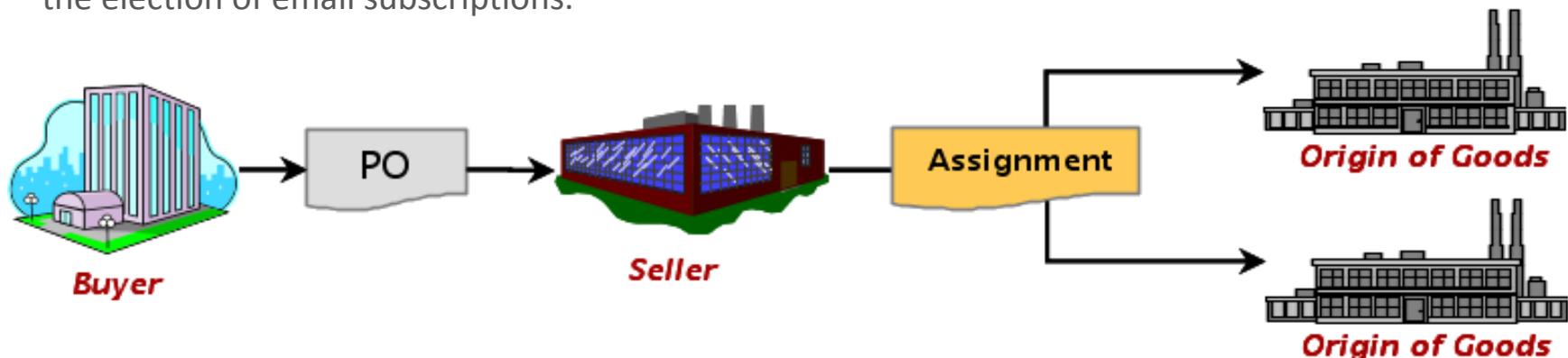
The screenshot displays the GT NEXUS Reports interface. At the top, there is a navigation bar with the GT NEXUS logo, a search bar, and links for Help, Return to Admin, Support, and Settings. Below the navigation bar, there are tabs for Home, Tasks, Transactions, Reports, and a Create button. The Reports section is active, showing a list of reports with columns for Title, Description, Designed By, User Last Modified, Last Modified, and Actions. The table contains three reports related to PO Collaboration: POC Status: Negotiation Complete, POC Status: PVR - Negotiate, and POC Status: PVR Critical. Each report has an Open and Schedule button in the Actions column.

☆	Title	Description	Designed By	User Last Modified	Last Modified	Actions
★	POC Status: Negotiation Complete	Management	Member Services Williams-Sonoma Vendor 2			Open Schedule
★	POC Status: PVR - Negotiate	Management	Member Services Williams-Sonoma Vendor 2			Open Schedule
★	POC Status: PVR Critical	Management	Member Services Williams-Sonoma Vendor 2			Open Schedule

Order Assignment

Highlights of Order Assignment

- The Order Assignment document is a document created to identify and give visibility to the appropriate factory/origin of goods to produce items listed in the Purchase Order.
- Once the PO document reflects a status of “Active”, the system will draft the Order Assignment and create a task for the vendor to action. The task will be assigned to the designated Vendor User.
 - If the Vendor has only one factory, the Order Assignment is auto-assigned to the factory and no task will be present for the vendor to action.
 - Vendors with multiple factories will require a User to assign a factory manually by completing the Order Assignment Task.
- Only one factory can be assigned per PO.
- The Order Assignment document (**Active** or **Pending**), is stored in the Purchase Order folder.
- The Order Assignment can be made or amended at any point during PO Collaboration.
- Williams-Sonoma Factories will NOT have access to GT Nexus.
- Williams-Sonoma will have visibility to the factory assignments through reporting as well as through the election of email subscriptions.



How to Complete an Order Assignment, continued

The screenshot shows the 'Order Assignment - Identification' screen. The breadcrumb trail is 'Orders > Order Folder UK-TESTING-120 > Order Assignment'. The main title is 'Order Assignment - Identification'. Below the title, there are three sections: 'ASSIGNMENT IDENTIFICATION', 'ORIGIN OF GOODS PARTY', and 'Reference Number'. The 'ASSIGNMENT IDENTIFICATION' section contains 'PO # UK-TESTING-120' and 'Latest Ship/Delivery Date 2014-03-17'. The 'ORIGIN OF GOODS PARTY' section contains 'Origin Of Goods 1' and 'Buyer Williams-Sonoma, Inc.'. There are three input fields: 'Origin Of Goods 1', 'Member ID', and 'Reference Number'. A blue arrow icon is next to the 'Origin Of Goods 1' field. A pop-up window titled 'Parvus - Google Chrome' is open, showing a search page for 'MEMBER PARTY SEARCH CRITERIA FOR Origin Of Goods'. The search results table has two columns: 'GT Nexus Member ID' and 'Company Name'. The first row shows '4747-9890-1802-1340' and 'Williams-Sonoma Vendor 1 Factory'. A 'Back' button and a 'Next' button are at the bottom right of the main screen. Three orange callout boxes with numbers 1, 2, and 3 are overlaid on the image. Callout 1 points to the blue arrow icon. Callout 2 points to the first search result in the pop-up window. Callout 3 points to the 'Next' button.

To proceed the Order Assignment, complete the following steps (continued).

1. Mouse over **Origin of Goods 1** box and click the blue arrow icon  to select a Factory.
2. Select a factory presented on the address book.
3. Click **Next**.

How to Complete an Order Assignment, continued

Order Assignment - Line Items

LINE ITEM ASSIGNMENT

Show Sublines Line # / Buyer Item # / Short Desc / Add Desc

Select	Line #	Buyer Item #	Short Description	Pack Code	RetailCostPrice	PortOfLading	ProdReferenceNumber1	Quantity	Origin Of Goods
<input type="checkbox"/>	L 0001	5193628	DTC Kpske Ormnt Frm Sqr SlvLf		0	China	A	350	Williams-Sonoma Vendor 1 Factory ▼
<input type="checkbox"/>	L 0002	2052611	Frame Ornament Circle GltrPZ		0	China	A	590	Williams-Sonoma Vendor 1 Factory ▼
<input type="checkbox"/>	L 0003	2052686	Frame Ornament Square Gltr PZ		0	China	A	636	Williams-Sonoma Vendor 1 Factory ▼

ORIGIN OF GOODS ASSIGNMENT

4

5

To proceed the Order Assignment, complete the following steps (continued).

4. Check if the **Origin of Goods** are assigned to the factory accordingly.
5. Click **Next**.

How to Complete an Order Assignment, continued

The screenshot shows the 'Order Assignment' interface. At the top right, there are two sets of buttons: 'Validate' and 'Edit' (callout 4), and 'Approve' and 'Edit' (callout 5). The main content area is divided into sections: 'ORDER IDENTIFICATION / TERMS' with fields for PO # (UK-TESTING-120), Contract Reference, and Latest Ship/Delivery Date (2014-03-17); 'PARTIES' with details for Buyer (WILLIAMS-SONOMA, INC.), Buyer's Agent (WILLIAM E. CONNOR ASSOC. LTD.), and Seller's Agent (TONGKANG CITY, ZHEJIANG); and a central 'ENTER PASSWORD' dialog box (callout 6) with a password input field, 'OK', and 'Cancel' buttons.

To proceed the Order Assignment, complete the following steps (continued).

6. Review the assignment and click **Validate**; alternatively, any factory change required, you can always click the **Edit** button to change the assigned factory before final approval.
7. Click **Approve**.
8. Enter your **password** and click **OK** to complete the assignment and upon the approval of the document, the Purchase Order will be visible to the assigned factory.

How to Amend an Order Assignment

The screenshot displays the 'Order Assignment - Identification' page. At the top right, there is an 'Amend' button (1). On the left sidebar, there is a 'Preview' button (4). The main content area shows 'ASSIGNMENT IDENTIFICATION' with details like PO # UK-TESTING-120 and Buyer Williams-Sonoma, Inc. Below this is the 'ORIGIN OF GOODS PARTY' section, which includes an 'Origin of Goods 1' field (2) with a blue arrow icon. A search popup window (3) is open, showing search criteria and a table of results:

GT Nexus Member ID	Company Name
1212-20-1802-1246	Williams-Sonoma Vendor 1 Factory

To amend the Order Assignment, complete the following steps.

1. Open the designated Order Assignment document you want to change the factory to and click **Amend**.
2. Mouse over **Origin of Goods 1** box and click the blue arrow icon  to select a Factory.
3. Select a factory presented on the address book.
4. Click **Preview**.

How to Amend an Order Assignment, continued

The screenshot shows the 'Order Assignment' interface. At the top right, there are three buttons: 'Validate', 'Edit', and 'Cancel'. Callout 7 points to the 'Validate' button. Below these are 'Approve' and 'Edit' buttons, with callout 8 pointing to the 'Approve' button. The main content area is titled 'ORDER IDENTIFICATION / TERMS' and contains the following information:

- PO #: 4500123456
- Latest Ship/Delivery Date: 2011-09-30
- Contract Reference: (empty)

In the center, there is a modal window titled 'ENTER PASSWORD' with a password input field (containing 10 dots) and 'OK' and 'Cancel' buttons. Callout 9 points to the password input field.

At the bottom, there are two sections for 'PARTIES':

- Buyer:** BUYER INC. (5717-9890-1800-5064), 100, PAPER STREET, FREMONT, CA 30472, UNITED STATES, Contact: BUYER USER
- SELLER CO., LTD.:** (5717-9890-1800-5066), 2F-6, NO. 60, SEC. 2, TUN HUA RD., TAIPEI, TAIWAN 106, TAIWAN, Contact: AMY WENG, Phone: 886-2-27023000

To amend the Order Assignment, complete the following steps (continued).

5. Review the assignment and click **Validate**.

Note: You may also click **Cancel** to cancel the amendment.

6. Click **Approve**.

7. Enter your **password** and click **OK** to complete the amendment and upon the approval of the document, the Purchase Order will be visible to the current assigned factory.

Reports

- Overview
- How to run a report
- How to schedule a report
- About designing a new report
- How to design a new report
- How to copy a report
- How to delete a report
- How to edit a report
- Tips

Reports Overview

- A real-time, on-line report generation tool is available on the GT Nexus system. The tool comprises both **Classic Report Designer** and **New Report Designer** that allows you to run, schedule or create report(s) that meets your reporting needs.
 - **Classic Report Designer** minimizes your report designing efforts in creating reports from the provided templates, where you will only design with the most commonly used columns.
 - **New Report Designer** provides greater flexibility to customize a report with special data inquiry needs, i.e. adding SQL system language as **Formula** or setting **Filters** or **Prompts** to narrow down the data output.
- **Note:** You must have the security right enabled to execute reports. If you do not, contact your account administrator for assistance
- Reports designed by either **Classic** or **New Report Designer** can provide document status information, evaluate documents compliance within a community, manage payments, track the packing & shipping status and schedule report delivery.
- In addition to designing capability, this tool allows you to run and schedule reports at specific time and date.
- Reports can be delivered in various formats, including **CSV, PDF, Tab Separated Text, Formatted Text, HTML, Excel** and **XML**.
- Reports and reporting related features can be accessed from the **Reports List** page.



Reports categories

Category	Description
Administrative	These reports are designed to assist GT Nexus account administrators within an organization. Account Administrators can use these reports to manage and analyze users task flows (a task flow shows a users task assignments).
Management	These reports are designed to assist managers of buyer organizations. These reports contain information about payments to vendors, product details, and invoices settled.
Payment	These reports are designed to assist the financial professional of an organization with accounting information of all transactions that are pending payment or have been settled. These reports are available to both buyers and sellers.
Transaction	These reports are designed to provide detailed information about all transaction from procurement to fulfillment such as order status, line item balances, shipment balances, order balances, document status and more. Some transactions reports focus on your workflow and provide information related to tasks that need to be completed by document type and/or user.

The following reports were developed for WSI.

Report Name	Description	Audience	Delivery Schedule
POC Status Negotiation Complete	This report displays all orders with a status of "Negotiation Complete".	WSI	Run on demand
POC Status PWR – Negotiate	This report displays all orders with a status of "PWR Negotiate".	WSI	Run on demand
POC Status PVR - Confirmed	This report displays all orders with a status of "PVR Confirmed".	WSI	Run on demand

PWR: Pending WSI Review

PVR: Pending Vendor Review

Note: Users must have applicable security rights to design and/or edit reports.

How to access the reports list page

The screenshot displays the GT Nexus user interface. At the top, the navigation bar includes 'Home', 'Tasks', 'Transactions', 'Reports', and 'Create'. The 'Reports' tab is selected, and its dropdown menu is open, showing 'Reports' and 'Scheduled Reports'. The 'Reports' link is highlighted with an orange box and an arrow. In the left sidebar, the 'Reports' section is also highlighted with an orange box and an arrow, showing a list of report types such as 'Active Orders Report', 'Logistics Provider Task Report With Vendor Invoice Number', 'Company Tasks by User', 'Vendor Fees Report', 'Unlinked Transports', 'Open Invoice Proof Of Delivery', and 'Customs Security Filing Summary Report'. The main content area shows a 'Document Search' bar, an 'Actions' section with various document creation and approval tasks, and a 'Partners' section with a 'Vendor' link.

To access the report, complete the following steps.

1. From the **Navigation** tab, click the **Reports** tab and select **Reports** from the drop-down menu.
2. From the Home screen click the Reports name link.

About the Reports List Page

Search options

Filter Reset

Design a New Report

	Title	Description	Report Category Tag	Designed By	Last Modified	Actions
★	Active Orders Report	Transaction				Schedule
★	ASN Delivery Report	Transaction				Schedule
★	Buyer Consolidated Settlement Report	Payment				Schedule
★	Buyer Payment Activity Summary Report	Payment				Schedule
★	Canceled Order Report	Transaction		Member Services Crocs, Inc		Open Design Schedule

Report name link

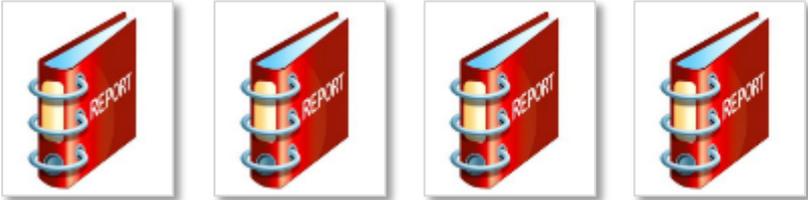
Date stamp of last modified

Design a new Report button

Favorite Flag

Name of Report Designer

Open Design and Schedule Buttons



- To filter a report, enter any part of the report title (i.e. **Order**) and click **Filter**; Reports contained the key word will be displayed. Click **Reset** to clear the filter.
- Click the ★ icon to flag the report as your favorite and it will always display on the top of the list.

How to Run a Report

The image shows two screenshots from a software interface. The top screenshot is a table with columns: Title, Description, Designed By, User Last Modified, Last Modified, and Actions. The table contains two rows: 'Order Shipment Status Report' and 'Active Orders Report'. An orange callout box labeled '1' points to the 'Active Orders Report' title. The bottom screenshot is a 'Run Report' dialog box for the 'Order Shipment Status Report'. It has a 'Run' button highlighted with an orange callout box labeled '2'. The dialog box contains several prompts: 'PD Ref Number', 'Buyer Name', 'Seller Name', 'Origin of Goods', and 'PD Latest Ex-Factory Date'. The 'PD Latest Ex-Factory Date' prompt is set to 'in next x WEEKS' with a value of '2'. There are also options for 'Page Orientation' (Portrait) and 'Paper Size' (Letter (8.5in x 11in)).

☆	Title	Description	Designed By	User Last Modified	Last Modified	Actions
☆	Order Shipment Status Report	Public Buyer Seller Template	GT Nexus		4 months ago	Open Schedule
☆	Active Orders Report	Transaction				Schedule

Order Shipment Status Report

Run Report

PD Ref Number not Choose an operator...

Buyer Name not Choose an operator...

Seller Name not Choose an operator...

Origin of Goods not Choose an operator...

PD Latest Ex-Factory Date not in next x WEEKS 2

Page Orientation: Portrait

Paper Size: Letter (8.5in x 11in)

HTML - In Browser Run

From the **Reports List** page, click the **Report Title** to run the report(s).

Note: The report format may either be in **Classic** or **New** template subject to the report designer being utilized. Regardless of the report template, to run a report, simply complete the following steps.

1. Click the Report **Title**.
2. A **Run Report** page with additional criteria/columns display for further selection. Select the applicable options from the Prompts displayed.
3. Select a **output format** from the **Choose a file type** dropdown list.
4. And a **page orientation/size**, click **Run** to generate the report.

Note: Time captured and displayed on the system is GMT time.

How to Schedule a Report

To schedule a report to run at designated times, complete the following steps.

1. Click **Reports** and **Scheduled Reports** from the drop-down menu.
2. From the displayed screen, click **Schedule a New Report** button. The **Reports List** page displays.
3. Scroll through the page to locate the applicable report to schedule. Click the **Schedule** button to the right of the report.

The screenshot shows the 'Scheduled Reports' page in the GT NEXUS application. The top navigation bar includes 'Home', 'Tasks', 'Transactions', 'Reports', and 'Create'. The 'Reports' dropdown menu is open, showing 'Reports' and 'Scheduled Reports'. A yellow button labeled 'Schedule a New Report' is visible on the right. Below this, the 'Report Scheduling' form is displayed, containing sections for 'Criteria Detail', 'Set Schedule', and 'Delivery Details'. The 'Criteria Detail' section includes fields for 'Report Name' (Order Sample Report Nov2013) and 'Schedule Name' (Order Sample Report Nov2013). The 'Set Schedule' section has radio buttons for 'Run Once' and 'Run every days', with 'Run Once' selected, and a 'When' dropdown set to 'Now'. The 'Delivery Details' section includes checkboxes for 'Empty Report Results' and 'Supress Report Notification', a 'Deliver to' field, an 'Additional Email Address' field, and a 'Send Report As' dropdown set to 'HTML'. An orange callout box points to the 'Schedule a New Report' button with the text 'Click to select report to schedule.' Another orange callout box points to the 'Report Scheduling' form with the text 'Complete the criteria's, then click Save.'

4. The **Report Scheduling** page displays.
5. Select the applicable **Criteria Detail**, **Set Schedule** and **Delivery Details**.
6. Click **Save**.

Note: Contact your administrator if you do not have security rights to schedule a report.

About designing a new report

The GT Nexus Platform has a report design tool that provides you with real time data and easy to use functions for quick and flexible custom reports generation.

The Report Designer is used to:

- Design and edit reports. Start with a template or design your own.
- Create reports from Orders, Invoices, Managed Adjustments, Pack Plans, Packing Manifests Advanced PO Collaboration and Work-in-Process tracking data.
- Drill down and get to data at the sub-line item level.
- Publish and share reports and report templates in your organization and partner communities.
- Manage reports by using tags, descriptions and saving to favorites,
- Build formulas, create filters and report prompts for other report users
- Specify sort and detail layout settings
- View report data in a summary or detailed format

Plan your report design and determine what specific information you want to see in the report and who the report is for.

When creating a new report you will need to specify the following:

- Report Name
- Share Settings
- Columns
- Filters and/or Prompts
- Sorting
- Additional Details

See a sample of the design a New Report page below.

GT NEXUS | Help | Return to Admin | Support | Settings

Home | Tasks | Transactions | Reports | Create +

Search...

Reports

New Report Starting point link. Template selection

New

- Adjustment
- Report ←

Classic Report Designer >> ↑ Link to the Classis Report Designer

Order ←

Includes general and detailed purchase order and item information. A good starting point for creating Lifecycle Reports (Procure-to-Pay, Shipment are connected to an order or its line item, invoice, packing plan, packing manifest, and equipment information.

- Blank Order Report** ← Blank template
- Invoiced Order Balance:** *Designed by GT Nexus* [Preview]

Invoice ↑ Related template

Includes detailed invoice and item information. A good starting point for creating discrepancy (compliance) reports and some general payment reports. Allows access to order and packing manifest information.

Packing Plan

Presents order item details as they are planned for packing. This data set displays general and detailed packing plan and item information. Allows access to order, invoice, packing manifest, and packing plan item data.

Packing Manifest

Presents order item details as they are actually packed. Displays general and detailed packing manifest and item information. Allows access to order and invoice information.

Managed Adjustment

Represents the amount that a buyer expects to issue (via charge or chargeback) to one of his its counterparties. Captures adjustment amounts through the document's life-cycle. Allows access to order and invoice information.

GT Nexus User

Displays general and detailed information about each end-user in an organization, such as name, address/e-mail subscriptions, the task flows that they are included in, and the user groups that they are a part of.

See a sample of the Report Designer page below.

The screenshot displays the Report Designer interface. At the top, a navigation bar includes a 'Favorite button' (star icon), the report name 'Untitled', a 'Private' lock icon, and 'Report Designer Tabs' (Columns, Filters, Sorting, Details). On the right, there are 'Preview Report button' (Preview) and a 'Save' button. The left sidebar, titled 'Order', lists data fields such as PO #, Buyer, Create Date, Currency, Custom Fields, Doc Adjustment Amount, Earliest Date, Incoterm, Incoterm Location, Invoiced Item Qty, Issue Date, Item Adjustment Amount, Latest Date, Merchandise Amount, Offer Expiry Date, Order Status, Order Total Amount, Order Total Qty, Pack Manifest Item Qty, Plan Item Qty, Printed Item Qty, Scanned Item Qty, Seller, Shipment Staged Item Qty, and Total Adjustment Amount. A 'Share Settings button' is located above this list. The main content area features a 'Columns' section with an 'Add Formula' button and a 'Formulas' section. A 'Formula Builder' callout points to the 'Add Formula' button, and a 'Report Designer Components and Functions' callout points to the 'Formulas' section. A 'Data Selection Menu' callout points to the list of data fields in the sidebar.

Favorite button

Report Name

Report Designer Tabs.

Preview Report button.

Preview Save

Share Settings button

Columns Filters Sorting Details

Columns

Columns define the report data fields. Click on a field in the data set to add a new Column to the report. Columns will appear in the order they were selected and can be reordered by dragging the handle to the left of any column.

Formulas

Formulas define the arithmetic calculations on numeric data fields as well as concatenations and other functions on text fields. The output of the formulas can be used as columns or in filters.

Add Formula

Formula Builder

Report Designer Components and Functions

Data Selection Menu: Select data fields to build the report.

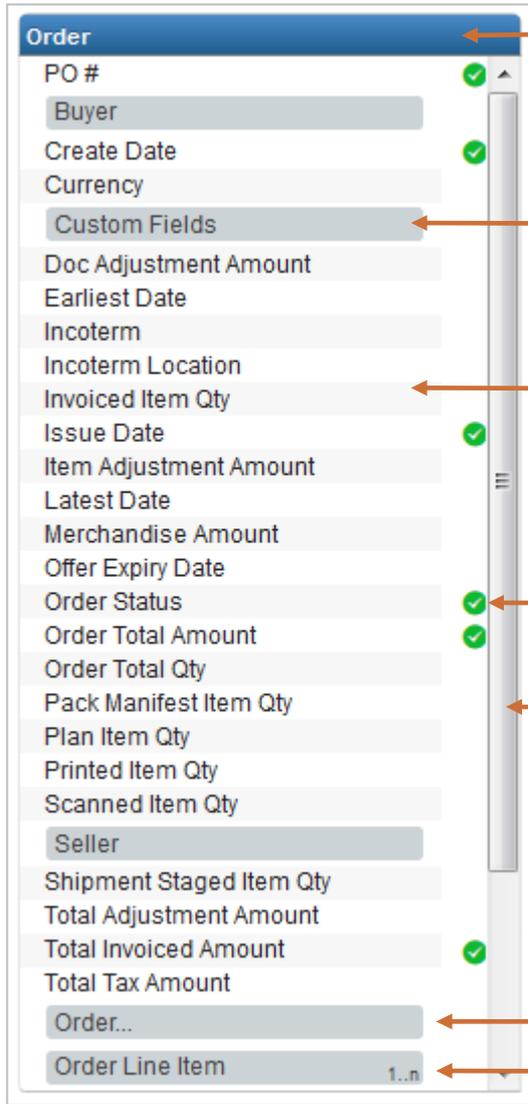
Navigating the Data Selection Menu

The Starting Point is identified by the dark blue bar at the top of the Data Selection menu. The Data Selection menu holds an alphabetical list of individual header level fields and field groups. This includes starting point line items and linked data sets displayed at the bottom end of the menu.

Any field that is highlighted in dark blue or grey identifies a data may include:

- Data Groups with detailed header level fields associated to Parties, Custom Fields, etc.
- Linked Data Groups (highlighted in the menu) reference Starting Point line item data, e.g. Order Line Items, or header and line item data from processes linked with the starting point document and data.

See a sample of the Data Selection Menu below.



Starting Point shows the selected data set. Click to return to the top of the header level of the starting point data set.

Data Groups: Fields highlighted in darker grey identify a group of data fields. For example, Custom Fields is a Data Group when selected custom fields for this organization will display.

Header Level Data fields: Key fields, and commonly used fields are displayed alphabetically below the starting point.

The **Green checkmark** identifies fields that have been selected for the report.

The scroll bar: Use to move up and down the Data Menu to select data.

Extended Data: The ellipsis (...) on the highlighted field indicates additional groups are available; click to extend the list.

Linked Data Sets: Highlighted fields with 1..n / 1..1 opens to **a)** Line Items level fields of the Starting Point, or **b)** Header and Line Item level data from other associated data sets.

Using the Data Selection Menu

Once data is selected, unless a new selection is made, the data view will remain as is when switching to other tabs in the report design panel.

The following figure illustrates how drilling in and scrolling up and down among header level data and data grouping (buyer) is displayed.

The screenshot shows a data selection menu with the following structure:

- Order** (selected)
 - PO #
 - Buyer (highlighted)
 - Create Date
 - Currency
 - Custom Fields
 - Doc Adjustment Am...
 - Earliest Date
 - Incoterm
 - Incoterm Location
 - Invoiced Item Qty
 - Issue Date
 - Item Adjustment Am...
 - Latest Date
 - Merchandise Amount
 - Offer Expiry Date
 - Order Status
 - Order Total Amount
 - Order Total Qty
 - Pack Manifest Item Qty
 - Plan Item Qty
 - Printed Item Qty
 - Scanned Item Qty
 - Seller
 - Shipment Staged Item Qty
 - Total Adjustment Amount
 - Total Invoiced Amount
 - Total Tax Amount
 - Order...
 - Order Line Item 1..n
- Buyer**
 - Name
 - Country
 - Key
 - Member ID
 - Member Name
 - Buyer... (highlighted)
- Buyer...**
 - Address Line 1
 - Address Line 2
 - Admin User
 - City
 - Client Manager
 - Contact Name
 - Department
 - E-mail
 - Fax
 - Locale
 - Member Create Date
 - Member Status
 - Phone
 - Postal Code
 - Region
 - State/Province

Annotations:

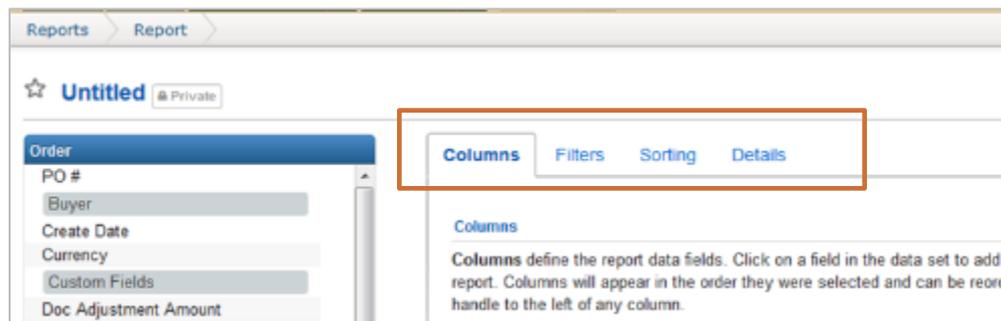
- A bracket on the right side of the 'Buyer...' list points to the 'Buyer...' header bar with the text: **Menu Headers** will display the order and level of the data view. Click the Header bar to go back to that menu.
- A bracket on the right side of the 'Buyer...' list points to the list of fields with the text: Additional header fields are shown.

About the designer tabs

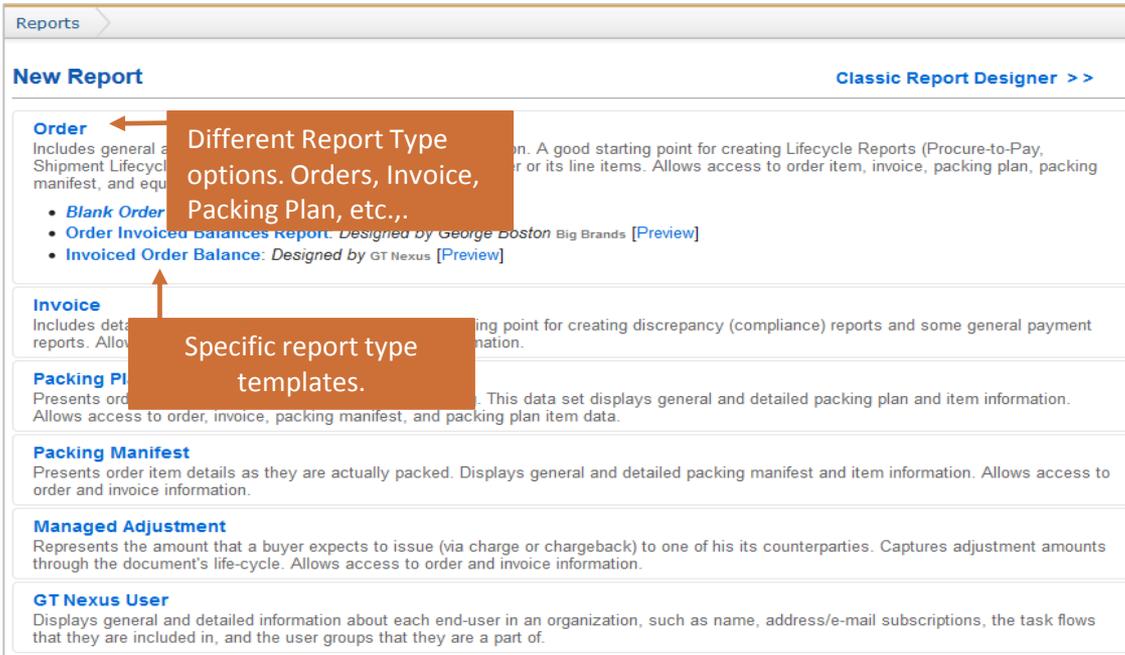
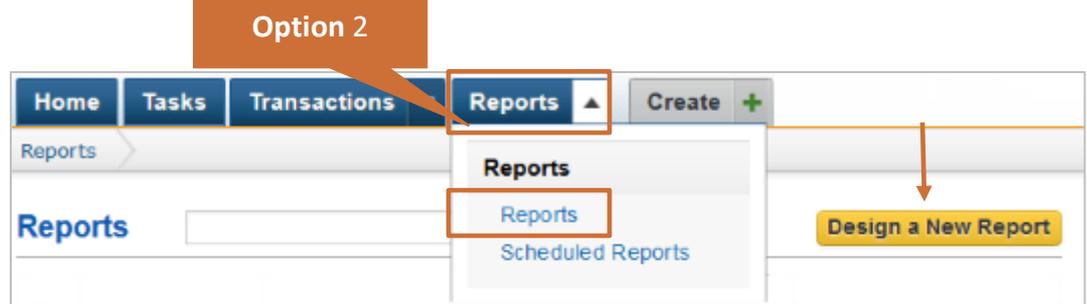
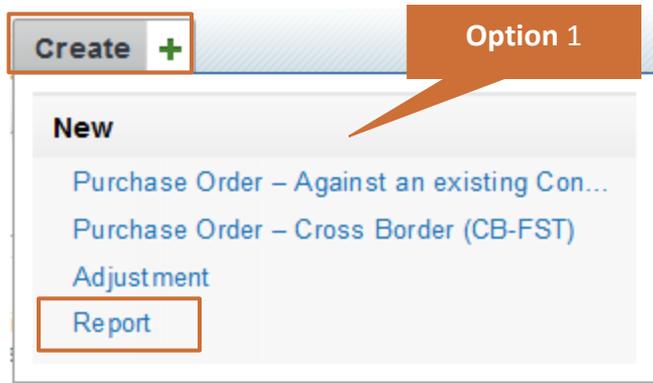
Use the designer tabs to build your report.

Below is a table describing each tab.

Category	Description
Columns	In the columns tab users can select data fields to display in the report as columns. And update the column labels (names) and group applicable data.
Filters	The filters tab allows users to add Filters and/or Prompts. Filters and Prompts define the output limitations of the report data. Prompts are filters that capture report criteria at the time of execution. Prompt(s) can be designed as 'required' by checking the Required when adding.
Sorting	The Sorting tab allows users to determine the order and direction of the report output. Data may be sorted in an ascending or descending direction.
Details	The Details tab allows users to add specific details to the report. Enable Sub totals, Paper Size, Categories, label as Template, etc.,



How to design a new report

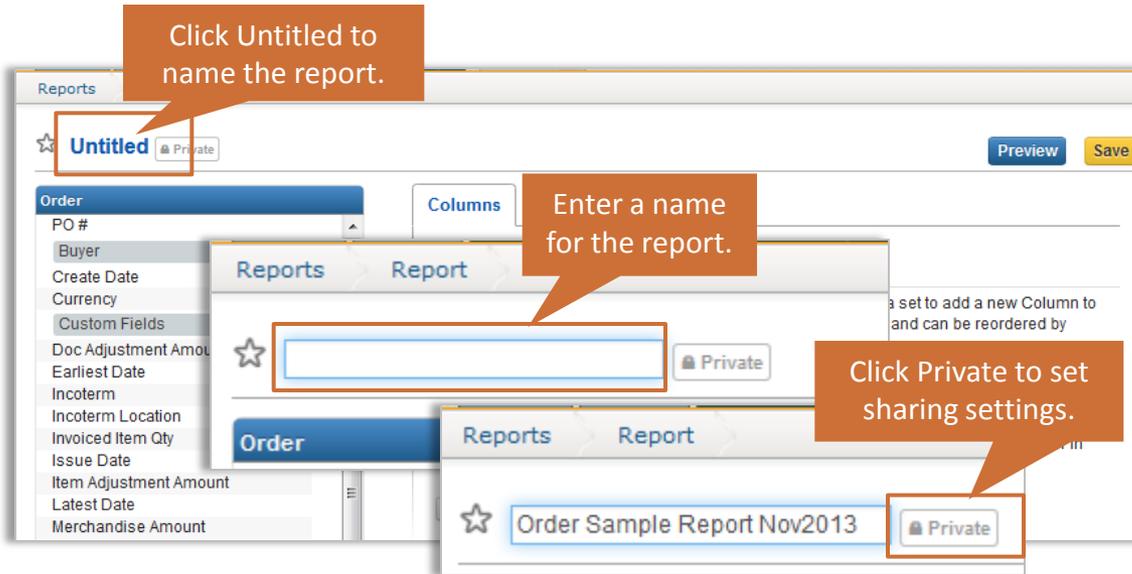


To design a new report, complete the following steps.

1. Access the new report designer:
 - a. Click the **Create** tab, then **Reports**.
 - b. Click the **Reports** tab, then **Reports** again. Then, click **Design a New Report** button.
2. The **New Report** page displays. Select a report type to start with, e.g. **Order** report.
3. Select a template to design your report, e.g. **Blank Order Report**.

Note: Users can update classic reports by clicking the Classic Report Designer link.

How to design a new report, continued

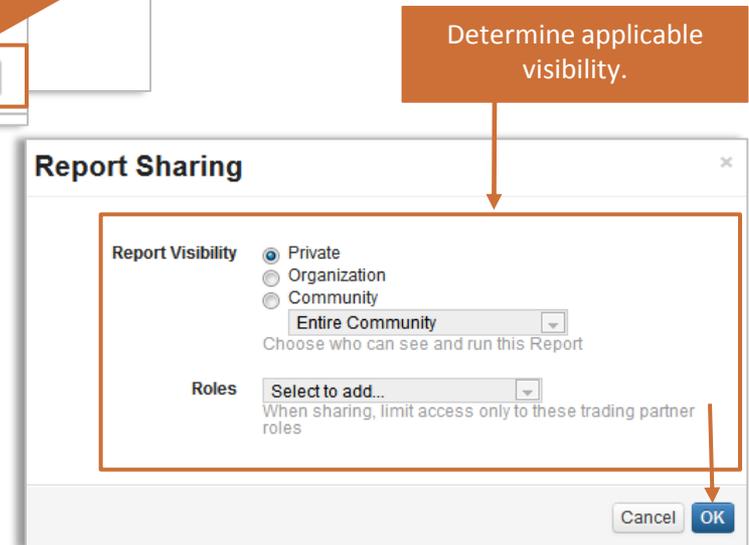


To design a new report, continued.

4. Click the **Untitled** link to name the report. Enter a unique name for the report.
5. Click the **Private** button.
6. The **Report Sharing** window displays, select the applicable report sharing setting. Click **OK**.

Use the table below for a description of each Sharing Setting option.

Sharing Option	Description
Private	Select Private to keep the report private, you will be the only one that can view and run the report (default).
Organization	Select Organization to share the report with anyone in your organization who has the appropriate report rights.
Community	Select Community to share the report with your partner communities. In addition, you can specify what roles within a community, e.g., Logistics Service Provider, can view the report.



How to design a new report, continued

The screenshot displays the 'Order Summary' report design interface. On the left is the 'Data Selection Menu' with a list of fields and green checkmarks indicating selection. On the right is the 'Columns' tab, which lists the selected fields: Buyer Name, Seller Name, Currency, and PO Number. Each field has a 'Label' field, a 'Format...' dropdown, a 'Group' checkbox, and an 'Aggregate...' dropdown. The 'PO Number' field has a 'Count Distinct' dropdown instead of an aggregate dropdown. Callouts provide instructions: 'Select all applicable data fields for your report.' points to the Data Selection Menu; 'Click and drag to move up or down.' points to the vertical handle on the left of the columns; 'Click to update name.' points to the 'Label' field; 'Click to group.' points to the 'Group' checkbox; and 'Click to delete.' points to the 'X' icon on the right of each column.

To design a new report, continued.

7. Use the **Data Selection Menu** to select data fields for your report.
8. The data fields selected will display under the **Columns** tab. These fields will be Columns in your report.
9. Under the **Columns** tab you can,
 - Update the column name by clicking the **Label** field
 - Organize the order of the columns by grabbing and dragging the field
 - Determine if data should be grouped by clicking the **Group** checkbox
 - You can delete a selected data field by clicking the **X** icon

How to design a new report, continued

The screenshot shows the 'Order Sample Report Nov2013' interface. The 'Filters' tab is active, showing a list of filters and prompts. The 'Filters' section is highlighted with a callout: 'Filters section.' The 'Prompts' section is also highlighted with a callout: 'Prompts section.' The 'Add Filter' button is highlighted with a callout: 'Click to add additional Filters'. The 'Add Prompt' button is highlighted with a callout: 'Click to make Required.' The 'Required' checkbox for the 'Issue Date' prompt is highlighted with a callout: 'Click to delete.' The 'Required' checkbox for the 'Issue Date' prompt is highlighted with a callout: 'Click to make Required.'

In order to run a report, users are required to include a filter and/or prompt to set a query range of data. Otherwise, the report output will not be set and the query will time out. Hence, all reports must be saved with a filter or prompt or a warning will display.

To design a new report, continued.

10. Click the **Filters** tab. Click **Add Filter** and select applicable filters for your report.
 - More filters can be made available by selecting them in the Data Selection Menu. Fields selected in the Filters tab will not display as a column in the report. These fields are used as filters and/or prompts only.
11. To add additional **Filters** click the **Add Filter** button.

12. Scroll to the **Prompts** section.
13. Click **Add Prompt** and select applicable prompts for your report.
 - Prompt are filters that capture report criteria at the time of execution. You can choose to make the prompt(s) "required" by clicking the Required checkbox.
14. To add additional Prompts click the **Add Prompt** button.
15. Click **Save**.

How to design a new report, continued

Order Sample Report Nov2013 Private

Order

Columns Filters **Sorting** Details

Sort Order determines the ordering and direction of the output data. Data may be sorted in an ascending or descending direction.

Break Group Auto Sorting

Do not apply default sorting to grouped items

Sort

Select a field... Ascending

Add sort

Click to add additional sorts.

Select sorts and set criteria.

16. Click the **Sorting** tab.

- In the Sorting tab users can determine the order and direction of the report output. Data may be sorted in an ascending or descending direction.

17. Click the **Add Sort** button. Determine the applicable sort for your report.

18. To add additional sorts click the **Add Sort** button.

19. Click the **Details** tab.

- In the Sorting tab users can add specific details to the report. **Layout Mode, Description, Paper Size, Categories, etc.,.**

20. Users can also enable **Sub Total** and **Grand Totals** in the details tab. Its recommended that these options are enabled when you have used **“Grouping”** within the report (in the **Columns** tab).

21. Click **Save**.

Columns Filters Sorting **Details**

Layout Mode Detail Table

Enable Sub Totals add sub total rows to the report output

Enable Grand Totals add a grand total row to the report output

Page Orientation Landscape

Paper Size Legal (8.5in x 14in)

Description

Categories Select to add...

Template Use this report as a Template

Scheduled Report Timeout

Click to set as template.

Use the details tab to set custom settings.

How to design a new report, continued

The screenshot shows the 'Run Report' interface for 'Order Sample Report Nov2013'. At the top, there are buttons for 'Copy', 'Delete', 'Run', 'Preview', and 'Save'. Below this, the report title 'Order Sample Report Nov2013' is displayed. A 'Run Report' section contains a list of prompts with checkboxes and operators. The 'Issue Date' prompt is marked as '*Required'. To the right, there are settings for 'Page Orientation' (Landscape) and 'Paper Size' (Legal (8.5in x 14in)). At the bottom, there is a 'Run' button and a dropdown menu for selecting the output format, with 'HTML - In Browser' selected. Callouts provide instructions: 'Prompts set during design.' points to the prompt list; 'Click to update Page Orientation and Paper Size.' points to the orientation and paper size settings; 'Click to edit report.' points to the 'Open Designer' button; 'Click to run.' points to the 'Run' button; 'Required prompt.' points to the '*Required' label; and 'Select applicable output.' points to the output format dropdown.

22. Click the **Run** button.
23. The **Run Report** page displays. All prompts set for this report display. Required prompts display ***Required** to the right of the field.
24. Users can update the **Page Orientation and Paper Size**.
25. Select the applicable output for the report, **HTML – in Browser** defaults.
26. Click **Run**.

How to design a new report, continued

Below is a sample of the Sample Report created in an HTML – in Browser output.

The screenshot shows a web interface for viewing a report. At the top, there's a breadcrumb trail: "Reports > Order Sample Report Nov2013". Below this, the report title "Order Sample Report Nov2013" is displayed with a star icon on the left and "Open Designer" and "Run" buttons on the right. A callout points to the star icon with the text "Click to make favorite.". Below the title, there's a "Show Prompts" button and a "Run" button. A callout points to the "Run" button with the text "Click to return to designer.". On the right side, there are settings for "Page Orientation" (set to Landscape) and "Paper Size" (set to Legal (8.5in x 14in)). Below these settings is a "Print" button, with a callout pointing to it that says "Click to print.". The main content is a table with the following data:

Buyer Name	Seller Name	Currency	PO Number	Order Status	Order Invoice Status	Issue Date	Latest Date	Order Total Qty	Order Merchandise Amount	Invoiced Item Qty	Total Invoiced Amount	Balance Quantity	Balance Value
BUYER Name	THE FASHION FACTORY	EUR	dw_PO	Active	Not Invoiced	2013-10-08	2013-09-06	2136	26,700.00			2136	26,700.00
			1				2136	26,700.00			2136	26,700.00	
	GARMENTS CO.,	USD	cmPO9-24Test1	Active	Not Invoiced	2013-09-24	2013-04-11	4510	170,297.60			4510	170,297.60
			1				4510	170,297.60			4510	170,297.60	

- Click the **Print** button to print the report.
- Click the **Open Designer** to return to designer page.
- Click the **Star** icon to make the report a favorite.

How to copy a designed report

To copy a designed report, complete the following steps.

1. Find the applicable report you would like to copy.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays. Click the **Copy** button.
4. The **Title** pop-up window displays. Enter a title for the new copied report.
5. Click **Ok**.

The screenshot shows a web application interface for report management. At the top, there is a navigation bar with tabs for 'Home', 'Tasks', 'Transactions', and 'Reports'. Below this, the current report is identified as 'Order Sample Report Nov2013'. A toolbar contains buttons for 'Copy', 'Delete', 'Run', 'Export', 'Preview', and 'Save'. A 'Title' pop-up window is open, prompting the user to 'Enter Report Title'. The text 'Order Sample Report Nov2013 - Copy' is entered in the input field. The 'OK' button is highlighted. Three orange callout boxes provide instructions: 'Click Copy.' points to the 'Copy' button, 'Enter a new title for the copied report.' points to the input field, and 'Click OK.' points to the 'OK' button.

How to delete a designed report

To delete a designed report, complete the following steps.

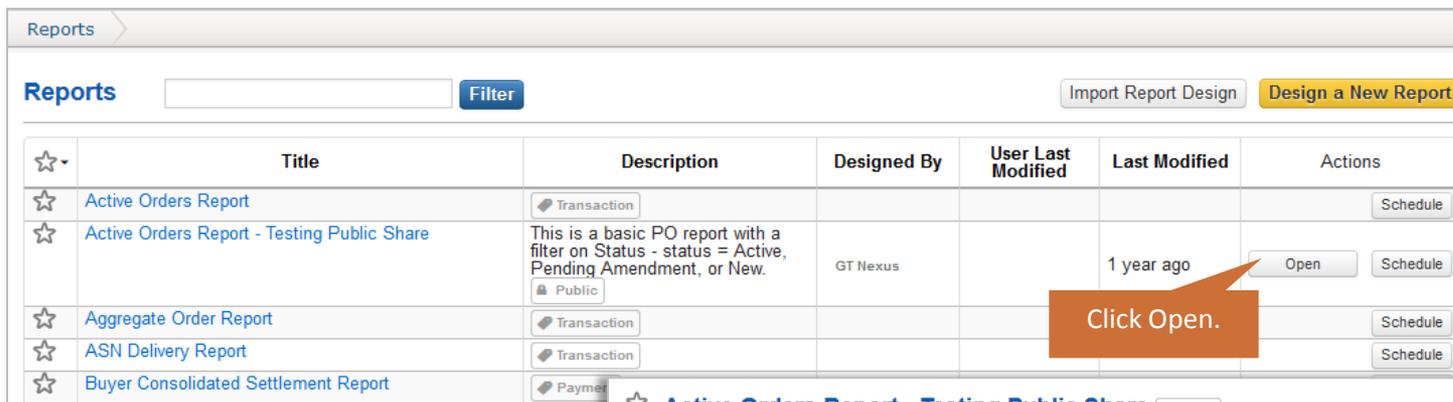
1. Find the applicable report you would like to delete.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays. Click the **Delete** button.
4. The **Delete** pop-up window displays, click **Delete**.

The screenshot shows the 'Order Sample Report Nov2013' configuration page. The 'Delete' button in the top right toolbar is highlighted with an orange callout bubble that says 'Click Delete.'. A modal window titled 'Delete Report Order Sample Report Nov2013' is open in the center, containing the text 'Delete this Report' and two buttons: 'Cancel' and 'Delete'. The 'Delete' button in the modal is also highlighted with an orange callout bubble that says 'Click Delete.'. The background shows the report configuration interface with a left sidebar for 'Order' fields and a main area for 'Columns' and 'Filters'.

How to edit a designed report

To edit a designed report, complete the following steps.

1. Find the applicable report you would like to edit.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays, make the appropriate changes to Columns, Filters, Sorting, and Details tabs. Click the **Preview** button.
4. Click **Save**.



☆	Title	Description	Designed By	User Last Modified	Last Modified	Actions
☆	Active Orders Report	Transaction				Schedule
☆	Active Orders Report - Testing Public Share	This is a basic PO report with a filter on Status - status = Active, Pending Amendment, or New. Public	GT Nexus		1 year ago	Open Schedule
☆	Aggregate Order Report	Transaction				Schedule
☆	ASN Delivery Report	Transaction				Schedule
☆	Buyer Consolidated Settlement Report	Payment				Schedule

Click Open.

Note: Only the original creator can make edits/changes to the report.



☆ Active Orders Report - Testing Public Share Public Copy Run E

Order

- PO # ✓
- Buyer
- Create Date ✓
- Currency
- Custom Fields
- Doc Adjustment Amount
- Earliest Date ✓
- Incoterm
- Incoterm Location

Columns Filters Sorting Details

Columns

Columns define the report data fields. Click on a field in the data set to add a new Column to the report. Columns will appear in the order they were selected and can be reordered by dragging the handle to the left of any column.

Buyer_Name

Label: Buyer Name Format... [Group] Aggregate...

Make the necessary changes

Reporting Tips



- If the Start Date and End Date are left blank, an error message will display.
- A report can only be saved if its been named and at least one filter and/or prompt has been set.
- Click the Star icon located next to every report name to make the report a favorite.
- Only the user who created the report can make edits to it.
- Create a report template – set as ‘Template’ in the Details tab, and share with your organization – select Organization from the Report Sharing window.





Administration

- **Assigning the Administrator for Your Account**
 - The person listed as the contact in the application is the default administrator. The administrator has the option of carrying out administrative functions or delegating this responsibility to other users. If the current administrator wants to be taken out of the workflow, the newly created administrator can accept the rights from the current administrator.
- **The Administrator Manages Key Areas of the Company's Account, Including:**
 - Delegating Administrator Function
 - Adding New Users
 - Managing User Profiles, Security and Task Flows
 - Resetting Passwords
 - Generating Reports

How to Manage Users

- Administrators can manage their organization's users within the system. Click **Settings** > **Users** at top right corner of the web page to add, edit and confirm user profile information for users in your organization.
- Administrators have access to all user information and the ability to add new users, change user names, passwords and security rights.
- The E-ID card for new users will be issued and mailed to the customer within 4 weeks. A new user will not be required to enter an Access Code upon login until the user receives the E-ID card.

GT NEXUS

Help | Contact Us | Log out | Settings

Home | Tasks | Transactions | Reports | Create

Search...

Users

User Profiles for Seller Co., Ltd. Viewing 1 - 8 of 8

User ID	Name	Status
aweng@seller	Seller User	Active
user1@awengseller	AWeng Seller User 1	Active
user2@awengseller	AW	Active
user3@awengseller	User 3	Active
user4@awengseller	Aweng Seller 4	Active
user5@awengseller	user5@awengseller	Active
user6@awengseller	user5@awengseller	Active
vic@seller	Seller User	Active

New User

- My Profile
- Company Settings
- Accounts
- Users**
- Community
- Task Flow
- Access
- Match Conditions
- Reference Tables
- Address Book

How to Manage User Profiles and Reset Password

- Use the **Settings > Users** tab to access the designated user profile. Administrators may change any user information except the User ID.
- Administrators also have the ability to reset another user's password.

The screenshot displays the GT NEXUS user management interface. At the top, the 'Settings' dropdown menu is open, with the 'Users' option highlighted. The main content area shows the 'Seller User' profile details, including fields for User ID, Full Name, User Status, E-mail Address, Phone Number, Mailing Address, Email CC, and Locale. A 'Reset Password' button is visible at the bottom right of the profile details section.

GT NEXUS Help | Contact Us | Log out | Settings

Home | Tasks | Transactions | Reports | Create +

Search

My Profile

Seller User

PROFILE DETAILS

User ID vlai@aaaaseller	E-mail Address vlai@tradecard.com
Full Name Seller User	Phone Number (optional)
User Status Active	Mailing Address Organization address
Email CC	Locale

Look Up

Reset Password **Validate**

How to Manage User Security

- A security profile defines precisely what actions a user can take within the system.
- Go to **Security Details** to view and make the selections.

SECURITY DETAILS ?

Grant	Security Right	Description
<input checked="" type="checkbox"/>	Administrator	administration rights
<input checked="" type="checkbox"/>	Attachment Rights	create, modify and cancel attachments
<input checked="" type="checkbox"/>	Commercial Invoice	approve the commercial invoice document
<input type="checkbox"/>	Dashboard Design Rights	rights to view, create, or modify Dashboard and Widgets
<input type="checkbox"/>	Dispatch Manifest	rights to create, or modify Dispatch Manifest Document.
<input checked="" type="checkbox"/>	Event Management Worksheet	rights to modify and approve event management worksheets.
<input checked="" type="checkbox"/>	Existing User Management	manages existing users and their rights.
<input checked="" type="checkbox"/>	Financing Request	creation and approval of financing for the requester
<input checked="" type="checkbox"/>	Invoice Initiation	create commercial invoice and packing list documents
<input type="checkbox"/>	Scorecard	rights to view, create, or modify scorecard designs and scorecard evaluations
<input type="checkbox"/>	Seller Payment Instruction	create and approve the seller payment instruction document

[Save Security](#)

About E-mail Subscription

- E-mail notifications are a standard feature of the system. The E-mail Subscription table allows the user to receive a specific type of E-mail message based on the category selected.
- The E-mail subscription table allows a user/administrator to indicate which category of E-mails they want to receive. The user can select which E-mail categories they want to subscribe to by checking the box in the 'Select' column next to the specific category of E-mails the user wants to receive. If a user does not select a particular E-mail category, that user will not receive any E-mails pertaining to that category.
- There are two categories of E-mails generated by the system:
 - Task assignment notification
 - Event notification (such as a purchase order amendment notification, payment credit confirmed...etc.)

E-MAIL SUBSCRIPTION

Administrative Events All None					
Selected	Event	Match Condition	Text	PDF	EXCEL
<input type="checkbox"/>	Task Assignment An online task has been assigned	NA	X		
<input type="checkbox"/>	Password Change Notification sent when the user password has changed	NA	X		
<input type="checkbox"/>	News and Updates Notification of news and upcoming events related to our product and services	NA	X		
<input type="checkbox"/>	E-Identity Change Notification sent when the authentication mode of a non-internal TC user is changed to EID	NA	X		

About Task Flows

- A **Task Flow** is an administration feature that allows users to control how tasks are routed and assigned to active users in your organization. The system looks for instructions on how to handle document related tasks such as creating, finishing, and approving from the 'Task Flows' that are activated for use. An active task flow will enable you to direct user assignments to specific users based upon certain transaction criteria set forth in the settings.
- Creating a New Task Flow - Click the **New Task Flow** button on the **Settings > Task Flow** tab. The **Task Flow** settings screen will be presented accordingly.
- This screen is divided into six sections.
 - Identification
 - Copy an Existing Task Flow
 - Task Notification
 - Document Types
 - Transaction Identifiers
 - Approval Level Build

The screenshot displays the GT NEXUS interface for 'Task Flows for Seller Co., Ltd.'. The top navigation bar includes 'Home', 'Tasks', 'Transactions', 'Reports', and 'Create'. The 'Settings' dropdown menu is open, showing options like 'My Profile', 'Company Settings', 'Accounts', 'Users', 'Community', 'Task Flow', 'Access', 'Match Conditions', 'Reference Tables', and 'Address Book'. The 'Task Flow' option is highlighted. Below the navigation, there are filters for 'Document', 'Action', 'Identifier', 'Status', and 'User'. A table lists two task flows:

Task Flow	Manager	Levels	Mode	Status	Created On	Last Modified
Invoice and Packing Slip	Seller User	1	Lenient	Active	2002-06-15 02:35:10.0	2010-09-23 16:18:57.937
PO and POA	Seller User	1	Lenient	Active	2007-09-12 06:35:44.903	2010-09-23 16:12:57.670

A 'New Task Flow' button is located at the bottom of the table.

How to Create a New Task Flow

To create a new task flow, complete the following steps.

1. Click **Settings > Task Flow**.
2. Select the **New Task Flow** button.
3. The Task Flow web page for settings will be displayed, which is divided into six sections.
 - Identification
 - Copy an Existing Task Flow
 - Task Notification
 - Document Types
 - Transaction Identifiers
 - Approval Level Build

The screenshot displays the GT NEXUS interface. At the top, the 'Settings' dropdown menu is open, showing options like 'My Profile', 'Company Settings', 'Accounts', 'Users', 'Community', 'Task Flow', 'Access', 'Match Conditions', 'Reference Tables', and 'Address Book'. The 'Task Flow' option is highlighted. Below the navigation, the 'Task Flows for Seller Co., Ltd.' page is shown, featuring a table with columns for Task Flow, Manager, Levels, Mode, Status, Created On, and Last Modified. A 'New Task Flow' button is located at the bottom of the page.

Task Flow	Manager	Levels	Mode	Status	Created On	Last Modified
Invoice and Receiving Slip	Seller User	1	Lenient	Active	2002-06-19 02:35:10.0	2010-09-23 16:13:57.937
PO and POA	Seller User	1	Lenient	Active	2007-09-12 06:35:44.953	2010-09-23 16:12:57.970

How to Create a New Task Flow, continued

4. Fill out the necessary information in the following sections (continued).

■ Section 1 – Identification

The administrator names the task flow, assigns a task flow manager to **Full Name** via the **Look Up** table, and selects the **Approval** mode.

The screenshot shows the 'TASK FLOW IDENTIFICATION' form. It has two columns. The left column contains a 'Task Flow' text box with 'New Taskflow' entered, and a 'Full Name' text box with 'Seller User' entered. A blue 'Look Up' button is positioned to the right of the 'Full Name' box. The right column contains a 'Status' dropdown menu with 'New' selected, and an 'Approval Mode' dropdown menu with 'Strict' selected.

■ Section 2 - Copy an Existing Task Flow

Copy details from an existing task flow by clicking **Look Up**.

The screenshot shows the 'COPY AN EXISTING TASK FLOW' form. It contains a single text box labeled 'Search for a task flow' and a blue 'Look Up' button to its right.

■ Section 3 - Task Notification

Specify E-mail notification for the task flow. There are 3 time levels for email notification: **Initial**, **Reminder** and **Overdue** notification.

The screenshot shows the 'TASK NOTIFICATION' form. It has a title 'TASK NOTIFICATION' and a subtitle 'Specify email notifications for this Task Flow'. It contains three sections: 'Initial Notification' with a dropdown set to 'Send immediately', 'Reminder Notification' with a dropdown set to 'Send 3 days', and 'Overdue Notification' with a dropdown set to 'Do not send'. Each dropdown is followed by the text 'after task assignment to user assigned' or 'after task assignment to user assigned and task flow manager'.

■ Section 4 - Document Types

Select the documents to be managed by the task flow.

The screenshot shows the 'DOCUMENT TYPES' form. It has a title 'DOCUMENT TYPES' and a subtitle 'Select the documents to be managed by this Task Flow'. It contains two columns of checkboxes. The left column is titled 'Procurement' and includes 'Purchase Order', 'Purchase Order Amendment', and 'Order Assignment'. The right column is titled 'Fulfillment & Settlement' and includes 'Commercial Invoice', 'Packing List', and 'Proof Of Inspection'.

How to Create a New Task Flow, continued.

To create a new task flow, complete the following steps (continued).

4. Fill out the necessary information in the following sections (continued).

■ Section 5 - Transaction Identifiers

Specify transaction attributes to match for the documents in the task flow. Select **Attribute** from the drop-down list and then assign/enter the value by clicking the **Edit** button.

■ Section 6 - Approval Level Build

- Click **Edit Users** to add users;
- Click the **Select** check box associated with any user that you wish to add to the approval level. And, select at least one assignable user by clicking on the associated **assignable** check-box.

Note1: Users specified as **Selected** will not receive E-mail Task notifications but may still complete a task assigned to another peer within the level. Users specified as **Selected and Assignable** for this level will be assigned tasks and receive E-mail notifications.

Note2: For dual approval required, check off the box **Require dual approval for this level**. For more than one level approval task flow, click **Add Level** to add another level.

- After completing the task flow setup, click **Activate** to make the task flow active in the system.

TRANSACTION IDENTIFIERS (optional)
Specify transaction attributes to match for the documents in this Task Flow

Attribute	Value		
Buyer Organization	Buyer Inc.	Edit	Delete
Transaction Type		Edit	Delete
Transaction Type		Edit	Delete

Add this number of additional attributes: 0 Add Update

APPROVAL LEVEL BUILD

User ID	Name	Assignable	User Status	User
There are currently no users at this level.				

Require dual approval for this level Edit Users Update

Add Level

APPROVAL LEVEL BUILD

Select	Assignable	Name	User ID	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Seller User	aweng@seller	Active
<input type="checkbox"/>	<input type="checkbox"/>	Member Services	ahadow\$3717009010000066	Hidden
<input type="checkbox"/>	<input type="checkbox"/>	AWeng Seller User 1	user1@awengseller	Active
<input type="checkbox"/>	<input type="checkbox"/>	AW	user2@awengseller	Active
<input type="checkbox"/>	<input type="checkbox"/>	User 3	user3@awengseller	Active
<input type="checkbox"/>	<input type="checkbox"/>	Aweng Seller 4	user4@awengseller	Active

Select All Clear All

Require dual approval for this level Update

Add Level

Contacting GT Nexus

How to Contact GT Nexus



Get Help Online – Create Case on GT Nexus

1. Click **Support**, select **Create Case**, the **Customer Service – Case** window displays.
2. The form will auto populate information about the **User** and the **Company Name**. Simply complete 3 additional fields on the web form prior to submitting the case and your queries will be taken care of:
 - **Subject**
 - **Issue**
 - **Problem Description**

The screenshot shows the 'Customer Service - Case' form in a browser window. The form is pre-populated with user and company information. The 'Subject' field contains 'Packing Plan, GOH'. The 'Issue' dropdown is set to 'Other'. The 'Problem Description' field contains the text: 'I don't see all GOH order quantities on the "item packing" page. Are GOH and standard cartons listed separately?'. The form includes 'Submit' and 'Reset' buttons at the bottom.

How to Contact GT Nexus, continued

GT Nexus Customer Service Hotline

- GT Nexus provides experienced professional support personnel offering world-class service using standard relationship management technology with a single repository for customer support data. GT Nexus utilizes tools that encourage proactive problem prevention and resolution. GT Nexus' goal is to provide a superior service experience to members seeking assistance with GT Nexus.
- GT Nexus' 'Global Member Service Program' starts with the assignment of a 'GT Nexus Client Manager' to each new member. GT Nexus client managers work with each member from registration, through training and then on day-to-day support issues.
- Every new GT Nexus member, including vendors, are assigned a client manager based upon their geographic location and are further supported by the 'GT Nexus Customer Service Centers' located in the regions where GT Nexus operates.

GT Nexus Regional Centers:

Region	Telephone	Fax	Email
US	1-800-905-TRADE (8723)	1-646-349-1843	service@gtnexus.com
China	86-755-8830-9265	86-755-8830-9030	
Hong Kong	852-2111-4039	852-3015-7871	
Korea	82-2-503-5086	82-2-6670-2759	
Taiwan	886-2-2702-0685	886-2-6602-1012	
Vietnam	84-8-3520-2880	84-8-3520-2800	
Sri Lanka	94-112-408408	94-114-518676	



Thank you