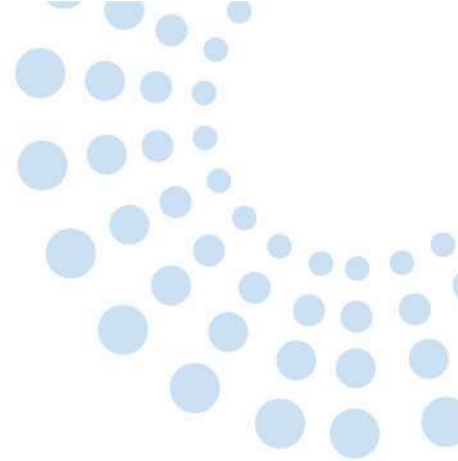




**HALDAN**  
CONSULTING  
analysis | production | performance



# AutoEDI Suite



**autoEDI**

integration | planning | shipping

# Supplier User Manual

**Solution Provider for:**



*Date: January 2020  
Compiled By: Haldan Consulting  
Document: MAN010 – AutoEDI Supplier  
Manual  
Version: 1.2*



## Table of Contents

AutoEDI Portal Supplier Guide.....	4
Welcome to the AutoEDI Portal.....	4
Accessing the AutoEDI Portal .....	4
Process.....	5
Login .....	5
The Release Overview.....	6
Accepting Releases.....	8
Viewing Release Details.....	9
Release History.....	10
Logging Out.....	12
Conclusion.....	12
Assistance.....	13



Version	Update	Date	Author
1.0	Creation	April 2018	David Hedderwick
1.1	Added Direct Link Enable	March 2019	David Hedderwick
1.2	Updated with Personalization and Accepted View New User Interface	January 2020	David Hedderwick

## AutoEDI Portal Supplier Guide

### Welcome to the AutoEDI Portal

Welcome to the AutoEDI Portal where your customer will distribute their releases. This user guide will assist you in navigating the Portal and obtaining your release. Your customer may issue you with a username and password for the Portal. This will usually be your email address.

### Accessing the AutoEDI Portal

To access the AutoEDI Portal you will need to use a web browser. The following web browsers are supported:

- Chrome 25+
- FireFox 20+
- Opera 19+
- Safari in OS X or later
- Edge

In addition, if you have an electronic document interchange (EDI) agreement with your customer, you may review or retrieve releases that you have not received via EDI from the Portal. If you have an EDI agreement, you may not be required to log on to the Portal to receive your release. In these cases, the confirmed delivery of the file to your EDI handler is considered acceptance of the release.

In order to log onto the Portal, you will need to enter the AutoEDI Portal web address into your browser.

<http://www.autoediportal.com>

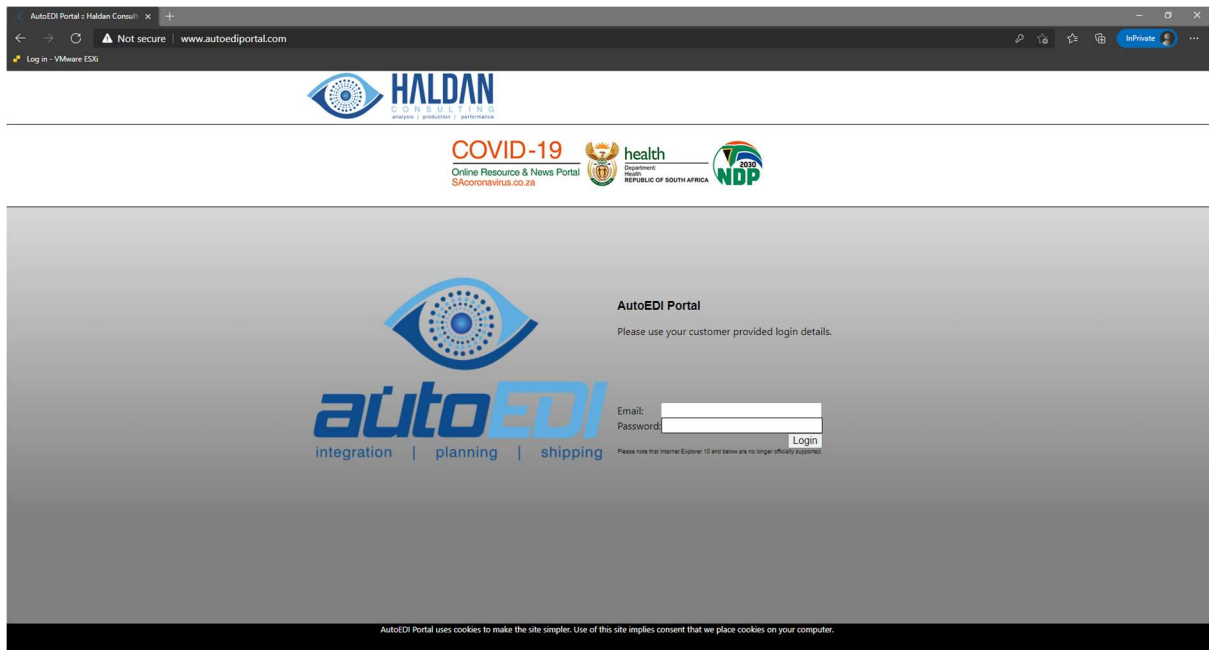


FIGURE 1 THE AUTOEDI PORTAL

## Process

### Login

Once you have entered the web address into your browser, enter the username and password assigned to you by your customer.

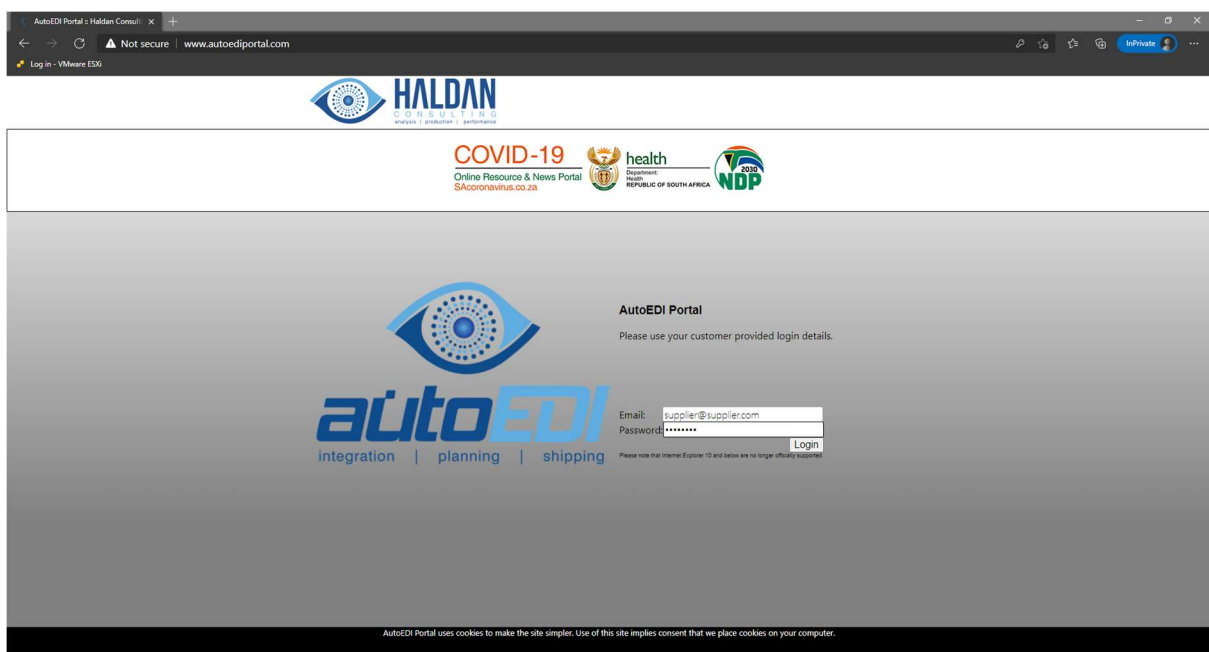


FIGURE 2 AUTOEDI PORTAL WITH USERNAME AND PASSWORD

Click on the Login button to log into the Portal.





Print All Parts

Date: 2013-08-27

FIGURE 6 RELEASE DATE

The Date of the release or order.

Part	Drawing No.	PartRev.	Description	Order Ref.	Cume	Last Rec	Del Note	Invoice No.	BACKLOG	Weeks:	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51
<input type="checkbox"/>	PC201	0002	Bolts for Fence	000447	12.000	12	DCO90	-	7,188	150150150150	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Accept

Export To Excel

FIGURE 7 RELEASE DETAILS (GRID VIEW)

The release in a grid view.

Part	Drawing No.	PartRev.	Description	Order Ref.	Cume	Last Rec	Del Note	Invoice No.	BACKLOG	Weeks:	35	36	37	38	39	40
<input type="checkbox"/>	PC201	0002	Bolts for Fence	000447	12.000	12	DCO90	-	7,188	150150150150	-	-	-	-	-	-

Accept

Export To Excel

Past Due  
 Changes to last Release

FIGURE 8 RELEASE COLOUR EXPLANATION

Release demand that is highlighted in red is late supply. Release demand that is highlighted in yellow has changed since the previous release.

email: emeyers@steelsupplies.com

Part	Drawing No.	PartRev.	Description	Order Ref.	Cume	Last Rec	Del Note	Invoice No.	BACKLOG	Weeks:	35	36	37	38	39	40	41	42
<input checked="" type="checkbox"/>	PC201	0002	Bolts for Fence	000447	12.000	12	DCO90	-	7,188	150150150150	-	-	-	-	-	-	-	-

Accept

Export To Excel

PREVIOUS RELEASE QTY: 0

Past Due  
 Changes to last Release

FIGURE 9 RELEASE CHANGE

Hovering your mouse pointer over a cell that is highlighted in yellow will show a pop-up that displays the previous release quantity for that bucket.

## Accepting Releases

As a supplier using the AutoEDI Portal you are required to accept releases. Failure to accept releases will result in a message being sent to your customer after forty-eight hours stating that you have not accepted the release.



FIGURE 10 ACCEPTING RELEASES

To accept the release, place a check mark in the check box next to the line. Then click on the Accept button.

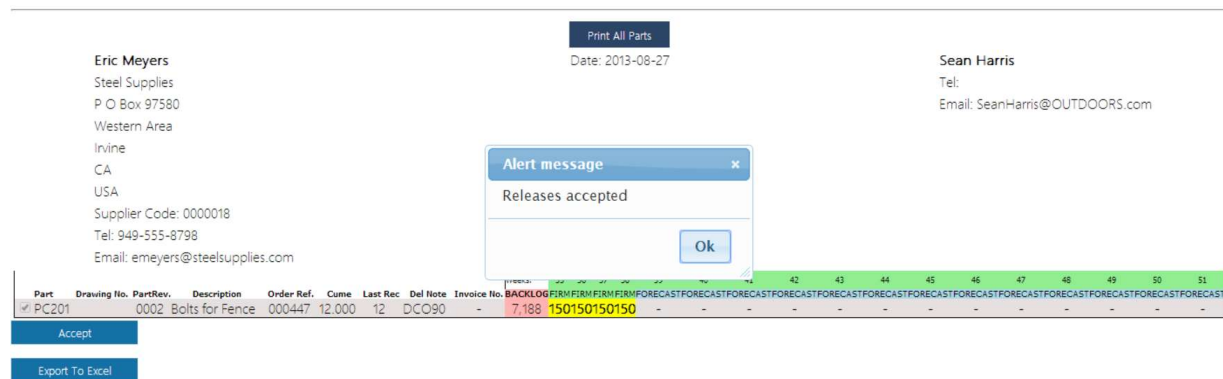


FIGURE 11 RELEASE ACCEPTANCE CONFIRMATION BOX

A message box will display stating that you have accepted the release. Click on OK to dismiss the message box.

Once a release has been accepted it cannot be unaccepted. If you are unable to accept a release please contact the buyer listed to address the reasons.





## Viewing Release Details

1 Of 1

Print All Parts      Print This Part

- Overdue Weeks

**THIS IS THE CURRENT RELEASE - RELEASE REF No. 0002 (2013-08-27 10:09:18)**

Part (Part Revision No.)	Description	U.O.M	YTD Rec	Last Received	Del Note
PC201 ( )	Bolts for Fence	EA	12.000	12	DCO90
Drawing Number	Contract Number				
	0000018/PC201/001				

Collection Week	Collection Date	Release Qty	Last Release Qty	Qty Change	Cum-Quantity	Order Ref
39	2012-09-25	150	0	+150	150	000447
40	2012-10-02	150	0	+150	300	000447
41	2012-10-09	150	0	+150	450	000447
42	2012-10-16	150	0	+150	600	000447
43	2012-10-23	150	0	+150	750	000447
44	2012-10-30	150	0	+150	900	000447
45	2012-11-06	150	0	+150	1050	000447
46	2012-11-13	150	0	+150	1200	000447
47	2012-11-20	150	0	+150	1350	000447
48	2012-11-27	150	0	+150	1500	000447
49	2012-12-04	150	0	+150	1650	000447
50	2012-12-11	150	0	+150	1800	000447
51	2012-12-18	150	0	+150	1950	000447
52	2013-01-05	150	0	+150	2100	000447
53	2013-01-09	150	0	+150	2250	000447
02	2013-01-08	150	0	+150	2400	000447
03	2013-01-15	150	0	+150	2550	000447
04	2013-01-22	150	0	+150	2700	000447
05	2013-01-29	150	0	+150	2850	000447
06	2013-02-05	150	0	+150	3000	000447
07	2013-02-12	150	0	+150	3150	000447

FIGURE 12 RELEASE DETAILS VIEW

Clicking on a release line will open the release details view for that release. The release details view displays the release in a more traditional method, highlighting past due lines, and showing the running cumulative value and order numbers for each line (where applicable).

It is possible to print this release to either a PDF document or to export it to Excel as shown below.

Export from AutoEDI

Date: 29-Jan-2014

Weekly demand for Steel Supplies

Part	Drawing No.	Part Rev.	Description	Order Ref.	Cume	Last Rec	Del Note	Invoice No.	BACKLOG	Weeks:	35	36	37	38	39	40	41	42	43	44	45	46	47	48
001	0002		Bolts for Fence	000447	12.000	12	DCO90		7,188	FIRM	FIRM	FIRM	FIRM	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST	FORECAST

FIGURE 13 RELEASE OVERVIEW EXPORT TO EXCEL



**Solutech**  
39 Heugh Road  
Walmer  
Port Elizabeth  
6070

**Supplier Release**

Supplier	Steel Supplies	Printed Date	2014-Jan-29
Supplier Code	0000018	Fax	949-555-8711
Contact	Eric Meyers	Tel	949-555-8798
Address	P O Box 97580 Western Area Irvine CA		

**THIS IS THE CURRENT RELEASE - RELEASE REF No.: 0002 (2013-08-27 10:09:18)**

Part (Part Rev. No.)	Description	U.O.M	YTD Rec	Last Received	Del Note
PC201 ( )	Bolts for Fence	EA	12.000	12	DCO90

Drawing Number: 0000018/PC201/001  
Contract Number: 0000018/PC201/001

Collection Week	Collection Date	Release Qty	Cum-Quantity	Order Ref
39	2012-09-25	138	150	000447
40	2012-10-02	150	300	000447
41	2012-10-09	150	450	000447
42	2012-10-16	150	600	000447
43	2012-10-23	150	750	000447
44	2012-10-30	150	900	000447
45	2012-11-06	150	1050	000447
46	2012-11-13	150	1200	000447
47	2012-11-20	150	1350	000447

FIGURE 14 RELEASE DETAIL PRINT TO PDF

## Release History

Click on the Reports → Release History button to review previous releases.

AutoEDI - Release History

www.autoediportal.co.za/releases/releasehist.php

Select company: [Haldan Consulting] | Release History

Please select the criteria to view a release

Select Supplier:	0000001	Select a Part number:	Please select a part number
Select Release Ref No.:		Select Release Ref No.:	Please select a release number

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FIGURE 15 RELEASE HISTORY REPORT

Select the part contract, and then release revision:

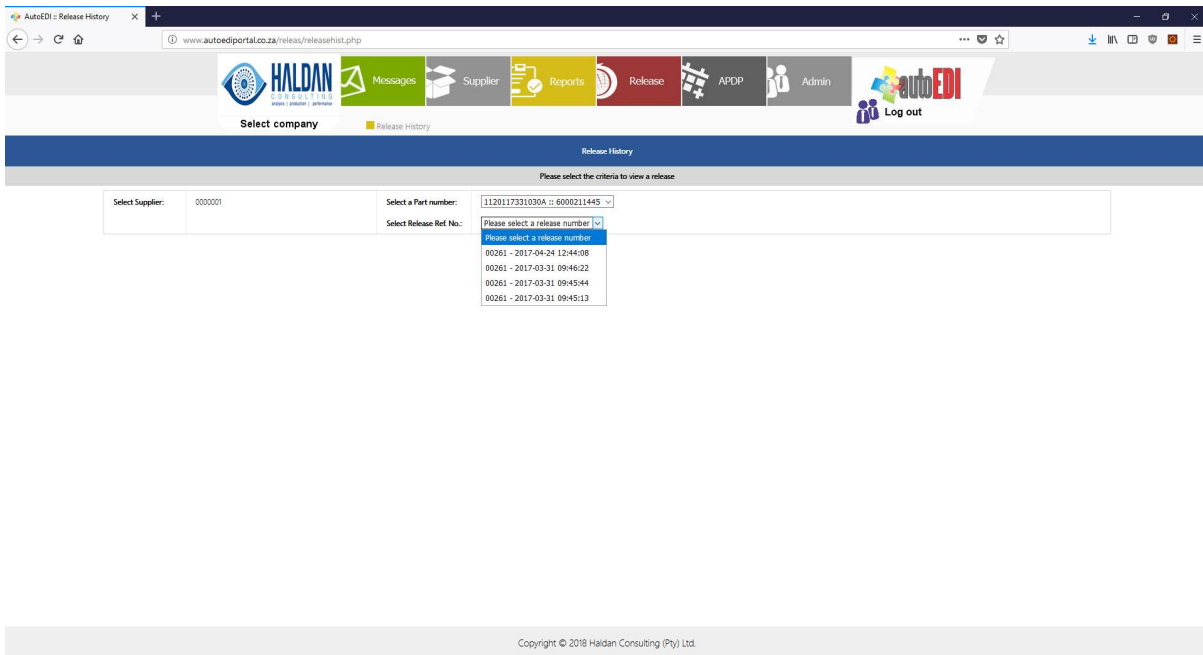


FIGURE 16 RELEASE AND REVISION

This will open a pop-out window. If the browser you are using prevents this, follow these steps:

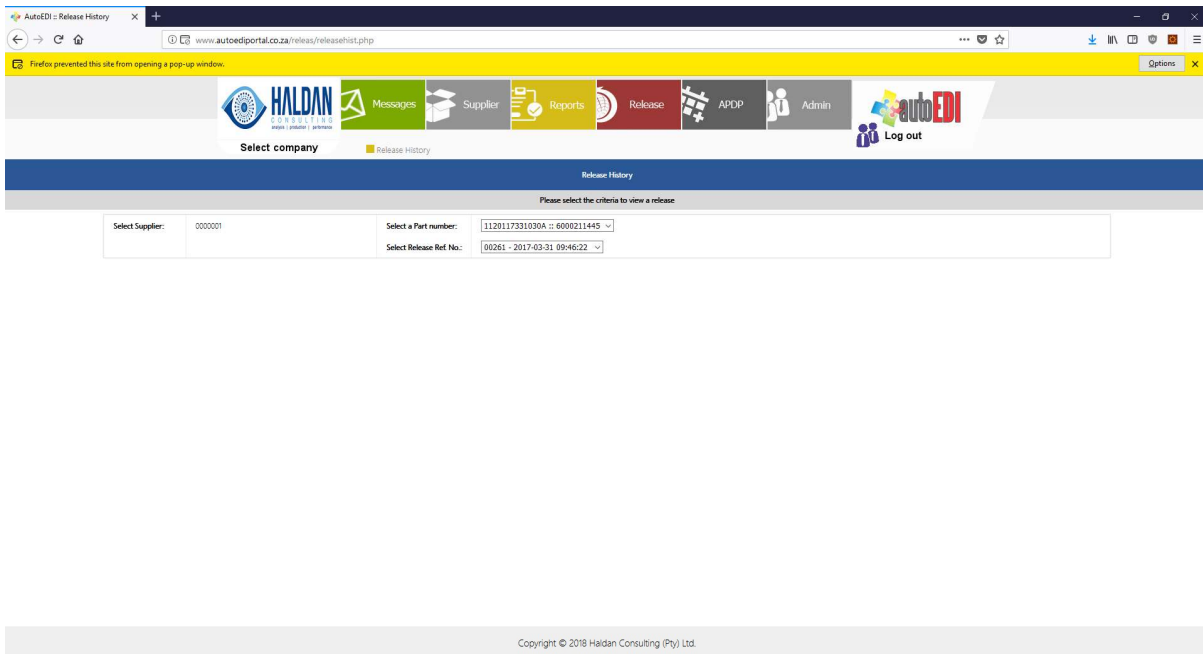
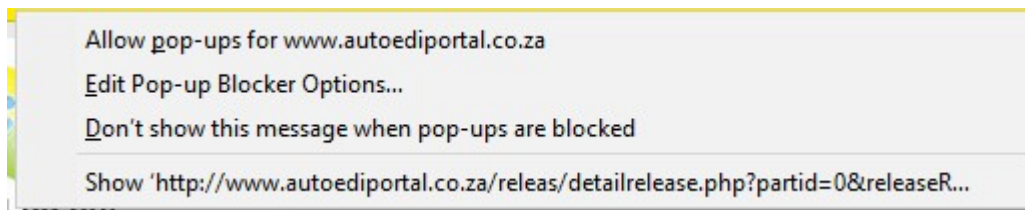


FIGURE 17 BLOCKED POP-UP

Click on the Options Button.



Click on the Allow Pop-ups from [www.autoediportal.co.za](http://www.autoediportal.co.za)



This will then show the previous release.

Part	Description	UOM	YTD Rec	Last Received	Del Note
1120117331030A		ST	6	6	00014037

Part	Part Revision	In Plant Week	In Plant Date	Release Qty	Last Release Qty	Qty Change	Cum-Quantity	Order Ref
1120117331030A		36	2016-09-07	0	0	0	6	503
1120117331030A		43	2016-10-27	238	0	+238	244	503
1120117331030A		5	2017-01-17	0	0	0	244	503

FIGURE 18 AN OLDER RELEASE

## Logging Out

To log out click the Log Out button.



FIGURE 19 LOG OUT BUTTON

## Conclusion

This AutoEDI Portal Supplier Guide has provided the reader with enough information to understand the information presented in the Portal and methods in which to export and accept the release as provided by the customer.

If the supplier has further requirements, such as full EDI flows they are asked to contact their customer and request such. The EDI methods provided by the Portal are VDA4905 and UN/EDIFACT DELFOR 97A.

## Assistance

If you are unable to login to the portal or your browser does not support the Portal, please contact [helpdesk@haldanconsulting.com](mailto:helpdesk@haldanconsulting.com) and we will investigate possible solutions and / or work around to facilitate your customers ordering process.