





Supplier User Manual

Solution Provider for:



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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.



The Release Overview

AutoEDI :: Release View	× +																						=	٥	×
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		Select company	C .	urrent Release																					
								Rel	ease Detail:	s															
				Pri	nt All Parts		Jeremy Daw Bicycles Uni P O Box 346 Northwest Richmond Ontario Canada	ison limited Supp 39 Tet 4 Email	ier Code: 000 16-555-9865 ; jdawson@bic	0001 cyclesunimite	ed.com En	ite: 2017-07 s an Harris t nail: SeanHa	1-19 ams@CUTE	OOR5.com											
Past Catalog Dra	wing Dawt Berr Description Order	Last Del Note Inv	Weeks:	17 18 :	19 20	21	22 2	23 24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41
1120117331030A	00261 S03	6 6 00014037				-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Кеу																									
Past Due	Changes to last Release	Accept		Export To Exe	sel																				

FIGURE 3 THE AUTOEDI PORTAL SUPPLIER GRID VIEW

At login the supplier is presented with the grid view layout of their releases. This provides an overview of all parts supplied to this customer. The information presented includes:

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Jeremy Dawson	
Bicycles Unlimited	Supplier Code: 0000001
P O Box 3469	Tel: 416-555-9865
Northwest	Email: jdawson@bicyclesunlimited.com
Richmond	
Ontario	
Canada	

FIGURE 4 SUPPLIER INFORMATION

The addressee of the supplier, or the contact to whom the release is addressed.

Sean Harris
Tel:
Email: SeanHarris@OUTDOORS.com

FIGURE 5 BUYER INFORMATION

The buyer who has placed the order, or the buyer to whom the supplier is to liaise.



Past Due

Changes to last Release



FIGURE 6 RELEASE DATE

The Date of the release or order.

	Part	Drawi	ing No. P	artRev	Description	Order Ref	Cume	Last Rec	Del Note	Invoice No	Weeks:	35 GEIRM	36 METRME	37 3 EIRMEI	38 IRMEC	39 DRECASTE	40 ORECAST	41 FORECAST	42 EORECAST	43 EORECAS		45	46 TEORECAST	47 EORECAST	48 EORECAST	49 EORECAST	50	51 EORECAST
C	DPC201	1	(0002 E	Bolts for Fence	000447	12.000	12	DCO90	-	7,188	150	01501	1501	<mark>50</mark>	-	-	-	-	-	-	-	-	-	-	-	-	-
	A	ccept																										
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	Export	L TO EM	Lei																									

FIGURE 7 RELEASE DETAILS (GRID VIEW)

The release in a grid view.

Dant D	Varian Maria	DavetBarr	Description	Orden Ref	Curre	Last Day	Del Hate	Taura ing Ma	Weeks:	35	36	37	38	39	40
Part D	rawing No. 1	0000	Delta for Conce	Onder Ker.	12.000	Last Ked	DCOOO	Invoice No.	7 400	1EO	1EO			FORECAS	FURECASTEC
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Acce	ept														
Export To	o Excel														
1															

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.

	CITICII.	enneyers	wsteelsupplie	S.COITI													
1									Weeks:	35	36	37	38	39	40	41	42
Part	Drawing No.	PartRev.	Description	Order Ref.	Cume	Last Rec	Del Note	Invoice No.	BACKLOG	FIRM	FIRM	1 FIRM	FIRME	ORECAST	FORECAS	TFORECAST	FORECAST
✓ PC20	1	0002 B	olts for Fence	000447	12.000	12	DC090	-	7,188	150	150)150	150	-	-	-	-
А	ccept										~		111			_	
												PRE	VIOL	IS REL	EASE Q	TY: 0	
Expor	t To Excel										_						
										P	ast	Due					
										-							
										0	har	nges	s to la	ast Rele	ease		

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.

Eric Meyers		Date: 2013-08-2				Se	ean Hari	ris				
Steel Supplies						Te	1:					
P O Box 97580						En	nail: Sear	Harris@	DUTD	OORS.co	m	
Western Area												
Irvine												
CA		Alert message	×									
USA		Releases accepted										
Supplier Code: 0000018												
Tel: 949-555-8798			Ok									
Email: emeyers@steelsupplies.com			UK									
		INEEKS. 33 30 37 30 37		42	43 44	45	46	47	48	49	50	51
Part Drawing No. PartRev. Description Order Ref. C PC201 0002 Bolts for Fence 000447 12	000 12 DCO90	- 7 188 150150150150 -	STFORECASTFORECA	STFORECASTFOR	ECASTFORECAST	FORECAST	FORECASTF	FORECASTI	FORECAST	FORECAST	FORECAST	FOREC

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 _ 🗇 🗙 💠 AutoEDI :: Relea × AutoEDI :: Rel < → C fi Dv utoediportal.co.za/rel ilrelease.php?partid=0&cursupp=0000018 \$3 » ≡ solutech Log out Select company 1 Of 1 Print All Parts - Overdue Weeks RELEASE REF No. THIS IS THE CURRENT RELEASE 0002 (2013-08-27 10:09:18 YTD Re **Bolts for Fence** FΔ

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.

EILE HOME INSERT PAGELAYOUT FORMULAS DATA REVIEW VIEW ADD-INS T	CurrentRelease.xls - Excel			•• ? A - & × David Hedderwick -
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Clipboard 16 Font 16 Alignment 16	Formatting * Table *	Styles	Cells	Editing ^
A1 • : × ✓ fr Export from AutoEDI				^
A B C D E F G H I	J K L M N	O P Q	R S T U	V W X
2 Export from AutoEDI				
3 Date:29-Jan-2014				
5 Weekly demand for Steel Supplies				
6				
7 8	Weeks: 35 36 37 38	39 40 41	42 43 44 45	46 47 48
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READY		: 4		□ + 100%

FIGURE 13 RELEASE OVERVIEW EXPORT TO EXCEL

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www.autoediportal.co.za/releas/pdf/5	2e8a1daa4d50.pd	f						
	Solutech Supplie	er Release			39 Her Walme Port E 6070	solutech ugh Road ar lizabeth		
	Supplier Supplier Code Contact Address	Steel Supplies 0000018 Eric Meyers P O Box 97580 Western	Area Irvine CA	Printed Date Fax Tel	2014-Jan-29 949-555-8711 949-555-8798	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	Contract Number 0000018/PC201/001						
	Collection Week	Collection Date	Release Qty	Cum-Qu	uantity C	Order Ref		
	39	2012-09-25	138	150	0	000447		
	40	2012-10-02	150	300	C	000447		
	41	2012-10-09	150	450	C	000447		
	42	2012-10-16	150	600	C	000447		
	43	2012-10-23	150	750	C	000447		
	44	2012-10-30	150	900	C	00447		
	45	2012-11-06	150	1050	C	000447	🖸 ा े 🔍 ピ 🖨	
	46	2012-11-13	150	1200	C	000447		
	47	2012-11-20	150	1350	(00447		

FIGURE 14 RELEASE DETAIL PRINT TO PDF

Release History

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

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		Select company	Messages Su	pplier Reports	Release	APDP	Admin	Cog out				
					Release History							
				Please select	the criteria to view a relea	ie						
	Select Supplier:	0000001	Select a Part number: Select Release Ref. No.:	Please select a part number Please select a release numb	er ~							

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FIGURE 15 RELEASE HISTORY REPORT

Select the part contract, and then release revision:



AutoEDI :: Release Histo	v × +									- 0	×
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		Select company	Release History					0.			
Rélease History											
Please select the obtria to jiew a release											
	Select Supplier:	0000001	Select a Part number: Select Release Ref. No.:	1120117331030A :: 6000211445 V Please select a release number V	e.						
				00261 - 2017-04-24 12:44:08 00261 - 2017-03-31 09:46:22							
				00261 - 2017-03-31 09:45:44 00261 - 2017-03-31 09:45:13							
				Copyright © 2018 Halda	an Consulting (Pty)	Ltd.					

FIGURE 16 RELEASE AND REVISION

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

AutoEDI :: Release History	× +									-	a ×	
↔ ↔ ↔ ↔	0 🗔 w	ww.autoediportal.co.za/releas/releasehist.	php						☑ ☆	⊻ II\ ⊡	•	:
Firefox prevented this site from a	opening a pop-up wi	indow.									Options X	
		Select company	Messages Su	oplier Reports	Release	APDP	Admin	Log out				
Récare Hatory												
Please select the offenia to view a release												
Select :	Supplier: 00	000001	Select a Part number: Select Release Ref. No.:	1120117331030A :: 60002114 00261 - 2017-03-31 09:46:22	45 ~							



Click on the Allow Pop-ups from <u>www.autoediportal.co.za</u>



Allow pop-ups for www.autoediportal.co.za

Edit Pop-up Blocker Options...

Don't show this message when pop-ups are blocked

Show 'http://www.autoediportal.co.za/releas/detailrelease.php?partid=0&releaseR...

This will then show the previous release.

AutoEDI = Release History 🛛 🗙	💠 AutoEDI :: Release View 🛛 🗙 📑	-						- 8
→ C' û	T www.autoediportal.co.za/relea	s/detailrelease.php?partid=0&rel	easeRevision=00261&releaseHeader	Id=17138&cursupp=0000001	Sctype=hist&partslist=1120117331	030A 6000211445	··· 🛛 🕁 🚽	: III\ 🖸 🛡 🖉
	Select compa	Messages	Supplier Brep	orts D Release	APOP 🕺 Adm	in AutoED So Log out		
				Detailed Release				
			i	1 OF1 - Overdue Weeks				
			THIS IS AN OLD RELEASE	- RELEASE REF No.: 00261 (2017-03	31 09:46:24)			
	Descriptic	m	U.O.M		YTD Rec	Last Received	Del Note	
'331030A			ST		6	6	00014037	
ng Number	Contract	Number	Supplier P	art				
Part	600021144 Part Resiston	5 In Plant Work	In Plant Date	Release Obv	Last Release Obv	Ob Charge	Cum Quantity	Order Ref
11201173310304	Tartnewskar	36	2016-09-07	0	Cass melease Cay	Cary Change	6	503
1120117331030A		43	2015-10-27	238	0	+238	244	S03
				Notes				
Supplier Contact D	letails:		Packing Details:					
Attention: Phone:			O/S Pallet Dimensions: O/S Container Dimensions:					
Fax:			Parts/Container:					
Emailt			Cont per Pallet Load:					
Payment Terms:			Parts per Pallet Load:					
Incoterms:								
Forwarding Contac	t Details:		Collection Details:					
Contact:								
Phone:								
			Copyright ©	2018 Haldan Consulting (Ptv) L	rd.			

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 ad UN/EDIFACT DELFOR 97A.

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Assistance

If you are unable to login to the portal or your browser does not support the Portal, please contact <u>helpdsk@haldanconsulting.com</u> and we will investigate possible solutions and / or work around to facilitate your customers ordering process.