erp2web

Chemical Industry

Supplier Portal

User Manual

erp2 enterprise

Overview

➢ The supplier portal will help to streamline the procurement process and give an opportunity to communicate in a safe, secure, and efficient manner.

➢ The procurement process is done by the interaction between two parties. One party is the ERP admin of GTZ India Pvt Ltd and the other party is the Supplier.

➢ This interaction will now be done via "Supplier Portal"

➢ Users of the portal will be able to sign in to the portal only if they are an employee or associated to the supplier which are listed in the ERP of GTZ India Pvt Ltd

➢ The admin will send an email which will consist of the sign in details of the users with respect to different suppliers from ERP.

➢ The users will 'Sign in' using the details in mail (if not received in inbox, kindly check the spam mails).

Supplier Portal – Purchase Process steps
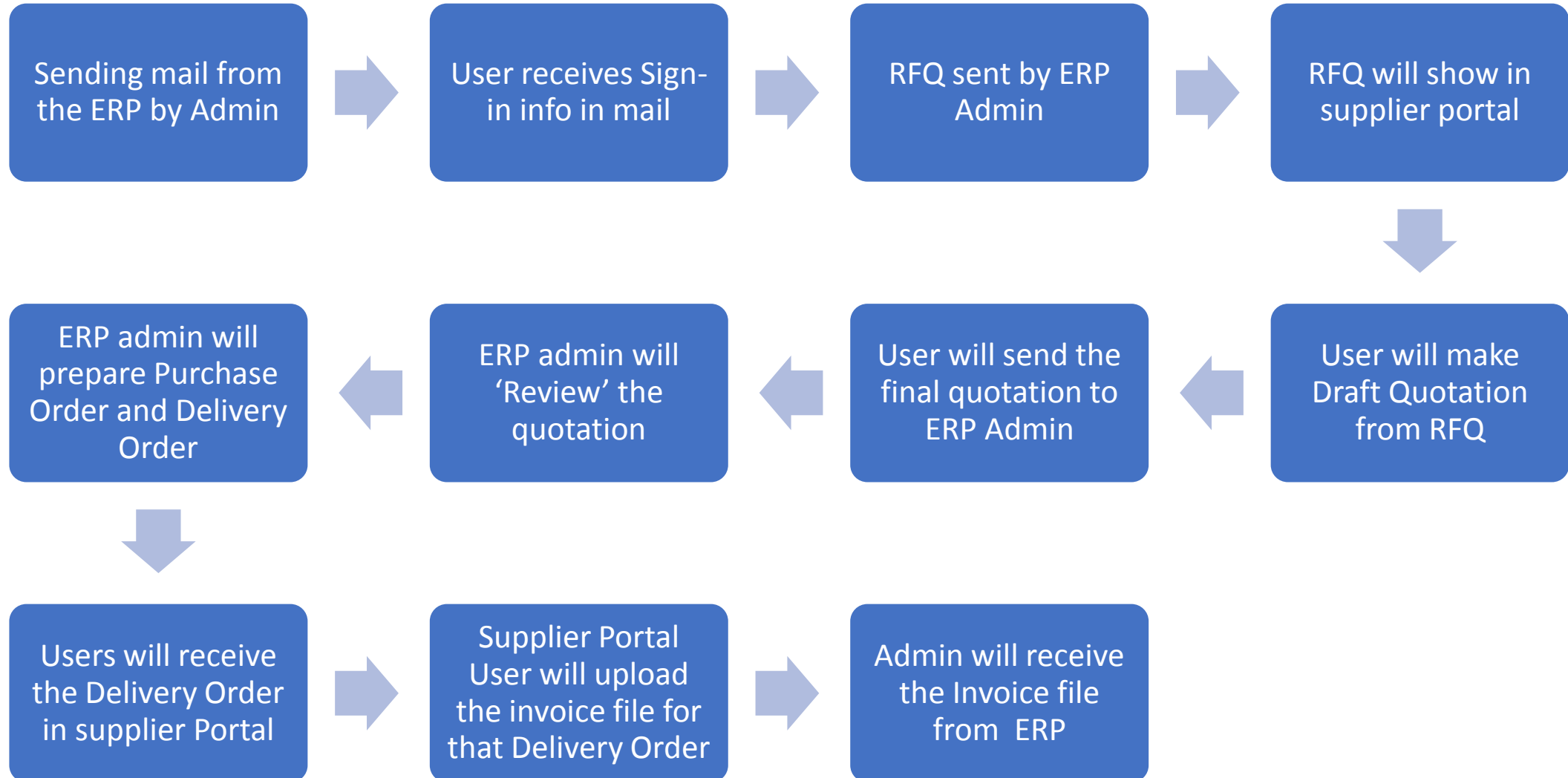
Step 1 – Supplier Portal User Sign In

Supplier Portal - User Sign In

➢ The ERP admin will mail the sign in details, demo video, and user manual to the provided e-mail id of the user.

➢ Only one user ID can be created against an email ID for a particular supplier.

➢ The user will receive the 'Sign in' details in mail, which will consist the following information –
- Supplier Portal Link
- Email Address
- Password
- Supplier Code

➢ Click on the provided link to open the supplier portal.

➢ Once you go to the supplier portal click on 'Sign In'.

➢ After clicking on 'Sign In' a pop up will open asking your sign in details that you received via email.

➢ Fill up the information and click on the Sign In button

***In case the password is lost/forgotten kindly contact GTZ India Pvt Ltd personnel to get new sign in details.

Supplier Portal – Sign In Page

Supplier Portal – Landing Page

After signing in to the portal, user will see a dashboard that consists of the process steps of the purchase process that is RFQ, Quotation, & Delivery Order.

The list of pending RFQs, Order vs Despatch graph, pending delivery order and a menu bar on the left side of the page.

➢ RFQ (Request for quotation) – Shows the number of pending RFQs

➢ Quotation – Shows the number of 'Draft' quotations vs 'Sent' quotations

➢ Delivery Order – Shows the number of 'Delivery Order' received from ERP Admin.

Supplier Portal – Landing Page
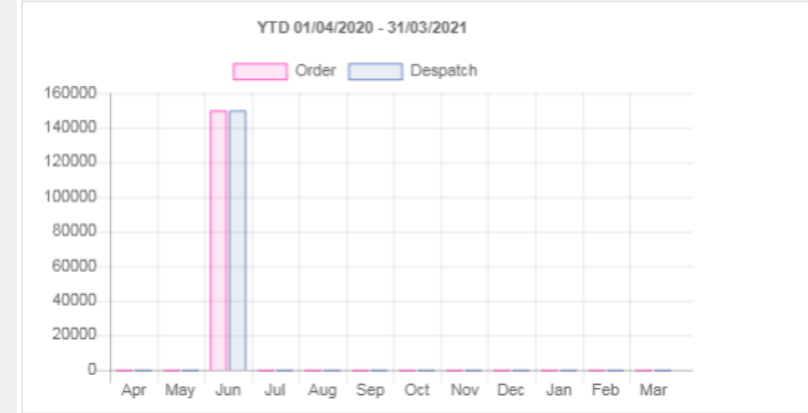
Step 2 – Receiving RFQ

Supplier Portal – Receiving RFQ

➢ ERP admin will generate RFQ (Request for quotation) from ERP and send that RFQ to respective suppliers.

➢ After admin has sent the RFQ, it will get updated in the supplier portal.

➢ User can see the pending RFQs from supplier portal dashboard. Click on the RFQ box to see the list of all pending RFQs which are waiting for quotation.

Supplier Portal - Receiving RFQ

Supplier Portal – Pending RFQ for Quotation

Step 3 – Create Quotation

Supplier Portal – Create Quotation

➢ From the list of pending RFQ, click on the view icon under action.

➢ RFQ will open in view mode and details of the RFQ with items and quantity will be shown.

➢ Click on the 'Create QTN' to proceed with creating quotation from that RFQ.

Supplier Portal – Create Quotation

Supplier Portal – Create Quotation

➢Give the quotation number, date and validity date of the quotation.

➢Select the items by clicking on the checkbox. User can prepare one quotation selecting one item only or can select as many items to prepare the quotation.

➢Give the make, origin, lead time, list price, give the tax percentage as applicable (IGST/ CGST and SGST) for each item.

➢Scroll below and give the credit days. Select the freight terms, Insurance terms and Payment terms from dropdown. Write down the Delivery terms and Payment terms details.

➢After putting in all the details click on the 'Save as Draft' button.

➢The quotation will be saved as draft.

Supplier Portal – Create Quotation

GTZ Supplier Portal   ABC PVT LTD   Manami |

| erp2enterprise | ‹ Quotation New |

- DASHBOARD
- RFQ
- QTN
- DO
- Sign Out

RFQ No.
000010-RFQ-2021-2022

Vendor Name
ABC PVT LTD

Quotation No.*
QTN-0022

Date
25/06/2021

Date
31/08/2021

Item Details

#	Item Name / HSN Code	Make/Origin	Qty UOM	Packing Mode Lead Time	List Price Amt	Disc Rate Amt	Freight Rate Amt	Ins Rate Amt	IGST Rate Amt	CGST Rate Amt	SGST Rate Amt	Gross Amt	Remarks
1 ☑	PQR POTASH H4321	LG CHEM	500 KG.	JAR / 2	1000 / 500000.00	0 / 0.00	0 / 0	0		9 / 45000.00	9 / 45000.00	590000.00	
2 ☐	XYZ ACID H1234		1000 KG.	/ 2									

Total Amount
500000.00

Total IGST Amount

Total CGST Amount
45000.00

Total SGST Amount
45000.00

Total Item Gross
590000

Credit Days
30

Delivery / Freight Terms
Standard delivery terms applicable

Insurance Terms
INSURED BY GTZ PAID BY GTZ

Payment Terms
Direct to Party

Payment Terms Details
Within 30 days

[Save as Draft]   [Back]

Step 4 – Send Quotation

Supplier Portal – Send Quotation

➢ On the dashboard the figures under the box 'Quotation' is showing the number of 'Draft quotation' vs the number of 'Sent quotation'.

➢ Click on the Quotation box to see the list of quotations.

➢ User can search for a quotation using the filter of 'RFQ number' or 'Quotation number'

➢ User can change and update the quotation by editing the quotation or even cancel the quotation until the quotation status is in 'Draft'.

➢ To Send the quotation click on view icon in action bar of that particular quotation. Check the data and click on 'Send' button.

➢ ERP admin will receive the 'Quotation' after clicking the send button.

Supplier Portal – Pending Draft Quotation

Supplier Portal – Pending Draft Quotation

Supplier Portal – Send Quotation

Supplier Portal – Quotation status changed to 'SENT'

➢ After sending the quotation, the status will change from 'Draft' to 'Sent' for that quotation.

➢ User can also take print of the quotation by clicking on the 'Print' icon in the action bar.

Supplier Portal – Print Sent Quotation

Supplier Portal – Quotation Print

ABC PVT LTD

PARTY CODE : V123456 PAN :   GST No. : 19AAACB2277D1Z2 State : West Bengal

QUOTATION

GTZ (India) Pvt. Ltd.		
9 Brabourne Road , P.B. No.152, Kolkata - 700001		

QUOTATION NO	: QTN-0022
QUOTATION DATE	: 25/06/2021
VALIDITY	: 31/08/2021

We thank you for your enquiry and have pleased to submit our quotation as below:

DESCRIPTION	HSN Code	Make/Origin	Qty UOM	Packing Mode Lead Time	List Price Amount	DISCOUNT		FREIGHT		CGST		SGST		IGST		Gross Amt	Remarks
						%	Rs.	%	Rs.	%	Rs.	%	Rs.	%	Rs.		
PQR POTASH	H4321	LG CHEM	500 KG.	JAR 2	1000.00 500000.00	0.00	0.00	0.00	0.00	9.00	45000.00	9.00	45000.00	0.00	0.00	590000.00	

CREDIT DAYS	: 30
PAYMENT TERMS	: Direct to Party
FREIGHT TERMS	: Standard delivery terms applicable
INSURANCE TERMS	: INSURED BY GTZ PAID BY GTZ

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Step 5 – Quotation 'Reviewed' by ERP Admin

Supplier Portal – Quotation status changed to 'Reviewed'

> After checking the quotation, the ERP admin will give approval to the quotation as reviewed.

> The status of the quotation will change to 'Reviewed'.

Supplier Portal – Quotation status 'Reviewed'

Supplier Portal – Quotation status 'Reviewed'

GTZ Supplier Portal

ABC PVT LTD   Manami |

erp2enterprise   ‹ Quotation Overview

- DASHBOARD
- RFQ
- QTN
- DO
- Sign Out

RFQ No.

_____

Quotation No.

Quotation Number

Date

Quotation Date

| Show | Back |

RFQ No.	QTN No.	QTN Date	Status	Action
000010-RFQ-2021-2022	QTN-00012	23/06/2021	REVIEWED	
000010-RFQ-2021-2022	QTN-0022	25/06/2021	REVIEWED	

Step 6 – Delivery Order Received from ERP Admin

Supplier Portal – Delivery Order Received from ERP Admin

➤ After reviewing the quotation, the ERP admin will prepare the 'Purchase Order' and 'Delivery Order' against the Quotation.

➤ User can check the Delivery orders by clicking on the box of 'Delivery Order' in the dashboard of the portal.

➤ User can take the print out of the 'Purchase Order' by clicking on the print icon in action.

Supplier Portal – Delivery Order received

Supplier Portal – Delivery Order received

Supplier Portal

ABC PVT LTD   Manami |

erp2enterprise   Approved DO

- DASHBOARD
- RFQ
- QTN
- DO
- Sign Out

#	QTN No.	PO No.	PO Date	DO No.	DO Date	Action
1	QTN-0022	000013-PO-RM/2021-2022	25/06/2021	000013-PO-RM/2021-2022/001	25/06/2021	
2	QTN-00012	000012-PO-RM/2021-2022	23/06/2021	000012-PO-RM/2021-2022/001	23/06/2021	

Supplier Portal – Purchase Order Print

GTZ (India) Pvt. Ltd.

9 Brabourne Road , P.B. No.152, Kolkata - 700001
Phone: 033-22429900/01 Fax: 033-22107634 Email: connect@gtzworld.com Web Site: www.gtzworld.com

PURCHASE ORDER

DOC.NO:F/PUR/20/3

ABC PVT LTD	**P.O.No.** : 000013-PO-RM/2021-2022
7/1B,Rai Charan Pal Lane	**P.O. DATE** : 25/06/2021

		DO NO.	: 000013-PO-RM/2021-2022/001
PARTY CODE	: V123456	**DO DATE**	: 25/06/2021
PAN No	:	YOUR QUOTATION NO	: QTN-0022
GSTIN No	: 19AAACB2277D1Z2	YOUR QUOTATION DATE	: 25/06/2021
State Code - Name	: 19 - West Bengal	**Place of Supply**	: 19 - West Bengal

We are pleased to place an order on you for the following materials:

DESCRIPTION	HSN Code	RMS NO	UOM	QTY	RATE PER UNIT	Despatch Date	DISCOUNT %	DISCOUNT Rs.
PQR POTASH	H4321		KG.	500	1000.00	25/06/2021	0.00	0.00

(Packing Mode :)

IGST Rate	:	Not Applicable
CGST Rate	:	Not Applicable
SGST Rate	:	Not Applicable
TCS	:	To be collected extra , if applicable
INSURANCE	:	INSURED BY GTZ PAID BY GTZ
MODE OF DESPATCH	:	Please deliver the goods at our factory on your cost.
DELIVERY / FREIGHT CHARGES	:	FOB
PAYMENT TERMS	:	Within 30 days
INVOICES	:	To be drawn in duplicate at our factory address: M/S. GTZ (India) Pvt. Ltd., Mouza : Khariberia, P.O. & Thana : Bishnupur, Dist : 24 Parganas (South)
REMARKS	:	Please send original and duplicate copies of invoice and material test certificate alongwith documents directly to our Kolkata Office.

OUR GSTIN NO	: 19AABCG1667P1Z2	**OUR PAN NO**	: AABCG1667P

Registered Office :KHARIBERIA, P.O. - BISHNUPUR, 24 PARGANAS (SOUTH), PIN: 743503
CIN :U27109WB1973PTC029127

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Step 7 – Invoice Upload

Supplier Portal – Invoice Upload

➢ User can upload invoice against Delivery Order number.

➢ Give the invoice number and invoice date.

➢ To upload the invoice file click on the 'choose file' button. Select the file you want to upload and upload the file.

➢ Write invoice remarks and click on 'Upload invoice'

➢ After uploading the invoice, ERP admin will receive the uploaded invoice in ERP.

➢After uploading the invoice user can see the uploaded file as well by clicking on the download icon in action bar and the file will open in a new tab.

Supplier Portal – Invoice Upload

Supplier Portal – view uploaded invoice

Supplier Portal

ABC PVT LTD   Manami |

erp2enterprise   Approved DO

- DASHBOARD
- RFQ
- QTN
- DO
- Sign Out

#	QTN No.	PO No.	PO Date	DO No.	DO Date	Action
1	QTN-0022	000013-PO-RM/2021-2022	25/06/2021	000013-PO-RM/2021-2022/001	25/06/2021	
2	QTN-00012	000012-PO-RM/2021-2022	23/06/2021	000012-PO-RM/2021-2022/001	23/06/2021	