

The Vendor Portal add-on module for Synergy For MAX provides additional functionality for Synergy users that integrated Synergy more fully with MAX.

This added logic to Synergy For MAX to allow authorized Vendor contacts in the Synergy Vendor Account to access Synergy and MAX data specific to that Vendor as follows:

- MRP Share – Planned orders where the Vendor is the Primary Vendor
- Post ASNs (Advanced Shipping Notices) – a means for the Vendor to approve planned orders with quantities and dates for the Buyer to convert to Purchase Orders in MAX.
- Open Orders – a view of Open Purchase Orders for this vendor to verify what is due and when.
- Receipt History – To show Receipt to Stock (Transaction) history for all receipts for this Vendor.
- Return To Vendor – Synergy Requests that communicate to the vendor that a receipt is being returned.
- Request For Quote – Synergy Requests for quotes for new parts that map to the MAX Part Vendor data.
- Various analysis reports for MAX and Synergy data.

How it Works:

Vendor data from MAX is imported into Synergy. This creates an Account in Synergy with a Vendor ID as the Account Code.

Contacts are set up with “portal access” and the background job sends them a user name and password to log into the vendor portal.

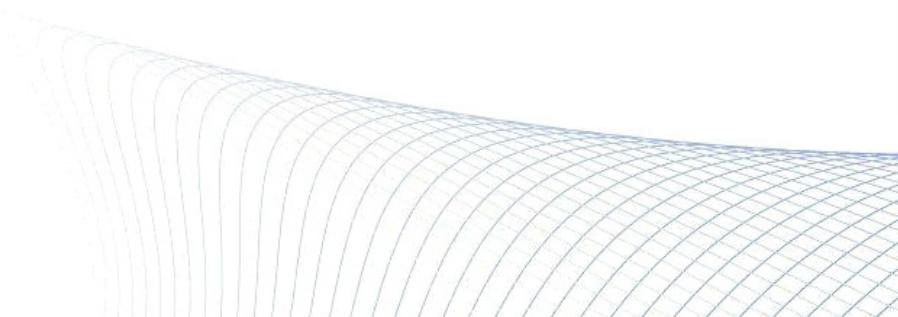
The Vendor Portal page is configured like the one below, which then pops up when the vendor logs into the Synergy. The login process ensures that the only data for this vendor can be viewed by that login id.

CRM | Service | Quality | Human Resources

Synergy for MAX - Vendor Portal

exact
software

Activities	Inquiries	Reports	Tools
Post ASNs	MRP Share Open Orders Receipt History Return to Vendor Request for Quotes	Vendor Score Card Inspection Results On-Time Delivery Return to Vendor Request for Quotes	Our Website



The following are samples pages of the screen contained in the module using standard Synergy pages and custom pages to pull MAX data into the portal.

MRP Share – a list of planned orders for this vendor:

Vendor Portal MRP Share for Vendor: , ID: , User: administrator, Buyer Name:							
Part ID	Description	Cust Ref	Qty	UOM	Order #	Price	Due Date
13000	Keyboard		30	EA	4000001000	\$10.00	12/01/06
13210	Hard Drive, 4 GB		25	EA	4000003800	\$75.00	10/20/06
13210	Hard Drive, 4 GB	December Orders	4	EA	4000016400	\$75.00	11/24/06
13400	Microprocessor	December Orders	13	EA	4000016500	\$250.00	11/17/06
13700	Memory 32 MB SIMM	Special Intel Order	11	EA	4000016600	\$20.00	10/13/06
13700	Memory 32 MB SIMM	December Orders	15	EA	4000016700	\$20.00	11/17/06

Open Orders – list of the open purchase orders for this vendor.

Vendor Portal Open Orders for Vendor: All Vendors, ID: N/A , User: administrator, Buyer Name: James Cotton											
Part ID	Description	LT	Qty	UOM	Order #	Plnr	Price	Due Date	Prom Date	Mfgr	MPN
13000	Keyboard		10	30	EA	4000001000	PL1	\$10.00	12/01/06	12/13/99	
13210	Hard Drive, 4 G		10	25	EA	4000003800	PL1	\$75.00	10/20/06	11/08/99	
13210	Hard Drive, 4 G		10	4	EA	4000016400	PL1	\$75.00	11/24/06	11/24/06	
13400	Microprocessor		10	13	EA	4000016500	PL1	\$250.00	11/17/06	11/17/06	Intel
13700	Memory 32 MB SI		10	11	EA	4000016600	PL1	\$20.00	10/13/06	10/13/06	
13700	Memory 32 MB SI		10	15	EA	4000016700	PL1	\$20.00	11/17/06	11/17/06	

Post ASNs – a list of Planned Orders that the vendor can update which automatically updates the Order Type from “PL” to “PR” and the Order Status from “1” to “2” so the buyer can approve them as purchase orders now that the vendor has confirmed them.

Vendor Portal Post ASNs for 2 Weeks for Vendor: All Vendors, ID: N/A , User: administrator, E									
Part ID	Description	Cust Ref	ASN Qty	UOM	Order #	Price	PO Date	ASN Date	
13000	Keyboard		30	EA	4000001000	\$10.00	12/01/06	12/13/99	
13210	Hard Drive, 4 GB		25	EA	4000003800	\$75.00	10/20/06	11/08/99	
13210	Hard Drive, 4 GB	December Orders	4	EA	4000016400	\$75.00	11/24/06	11/24/06	
13400	Microprocessor	December Orders	13	EA	4000016500	\$250.00	11/17/06	11/17/06	
13700	Memory 32 MB SIMM	Special Intel Order	11	EA	4000016600	\$20.00	10/13/06	10/13/06	
13700	Memory 32 MB SIMM	December Orders	15	EA	4000016700	\$20.00	11/17/06	11/17/06	

The **Edit ASN** for and order on the Post ASN page provides the means to update the quantity and or Date in MAX directly.

Edit ASN Data	
<input type="button" value="Save"/> <input type="button" value="Exit"/>	
Field	Value
Vendor Part #:	
Catalyst Part ID:	13000
Catalyst Description:	Keyboard
Order #:	40000010-00-00
PO Qty:	30.00
ASN Qty:	<input type="text" value="30.00"/>
PO Date:	12/01/2006
ASN Date:	<input type="text" value="12/13/1999"/>
Mfg:	
MPN:	
RoHS:	No
NCNR:	No
Packaging:	
Message:	
Buyer Name:	James Cotton

Request for Quote – A Synergy Request to communicate to the vendor for Part Vendor data.

Request for Quote - 00.000.035

Status : Approved Modified : [Dave Meyer 08/09/2009 09:58 AM](#)

Save Refresh Delete Copy Reject Do Close

Create Approve Do Process

Dave Meyer 08/09/2009 09:57 AM Manager: Item Everyone

Vendor V200 Exact Software - USA - Supplier - Active

Vendor Contact Mark Bayer - VP Sales

Requestor 1 Dave Meyer - Consultant - Division 001

Buyer Dave Meyer (Exact Contact)

Project MRP MRP

Part ID TEST MAX PART TEST MAX PART Spec Document 00.000.022 - Synergy for MAX I (PDF)

Quantity Requested 1,000.00

Date Created 08/09/2009 Date Needed 08/22/2009

Vendor Part Number

Manufacturer

Mfg Part Number

Break Quantity 1

Break Price 1

Break Quantity 2

Break Price 2

Break Quantity 3

Break Price 3

Vendor Note

Base Charge

Remarks: Request

Remarks: Workflow

Return to Vendor – a Synergy Request to communicate the return of received material.

Return to Vendor - New

Status : Open

Submit Edit Draft Close

Create Approve Do Process

Dave Meyer 08/10/2009 01:52 PM Manager: Item Role: Shipment Administrator Level: Division (Resource)

Resource 1 Dave Meyer - Consultant - Division 001

Part ID

Quantity

MAX PO Number

Non-Conformance Request

Requested Date 08/10/2009

Document

Project

Returned Date

Return Authorization

Remarks: Request

Vendor Score Card – gathers data on planned orders, purchase orders and receipts from MAX and Return To Vendor requests from Synergy and provides a summary report to show how well the vendor is doing.

Vendor Score Card as of 8/16/2009 1:00:20 PM				
Field:	Value:			
Vendor ID:	V200			
Vendor Name:	Hamilton Avnet			
Address 1:	1447 Commerce Blvd.			
Address 2:	Suite 1074			
City, St, Zip:	Compton, CA 92774			
Contact Name:	Luis Arguello			
Phone:	810-367-2000			
Year:	2009			
Metric	Value	Count	Value %	Count %
Annual Planned Orders:	\$74,650.00	6	17.6%	54.5%
YTD Purchase Orders:	\$349,867.83	5	82.4%	45.5%
Total Orders:	\$424,517.83	11	100.0%	100.0%
YTD Early Receipts:	\$761.00	2	36.5%	50.0%
YTD On Time Receipts:	\$1,071.60	1	51.5%	25.0%
YTD Late Receipts:	\$250.00	1	12.0%	25.0%
YTD Receipts:	\$2,082.60	4	100.0%	100.0%
YTD RTV Order:	\$1,234.00	1	59.3%	25.0%

On Time Delivery– presents Purchase Receipt transaction data compared the PO due date to gauge the on time delivery performance of a vendor with the order level detail within a Start With and End With month range.

On-Time Delivery as of 12/6/2009 10:32:19 AM

Select Vendor: V200 - Hamilton Avnet Start With: 2005-09 End Month: 2006-10 Submit

On-Time Delivery for All Vendors between 2005-09 and 2006-10

Part Number	Description	Vend ID	Vendor Name	Order	Due Date	Receipt Date	Days Late	Order Qty	Receipt Qty
11000	Computer MAX	V300	Wagner Bulk Products	700000-14-01	09/23/05	09/23/05	0.0	2.0	2.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	-1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	-1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	1.0
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	05/04/06	05/04/06	0.0	1.0	1.0
13000	Keyboard	V200	Hamilton Avnet	700000-15-01	05/18/06	05/04/06	-14.0	1.0	1.0
13000	Keyboard	V200	Hamilton Avnet	700000-15-01	05/18/06	05/04/06	-14.0	1.0	1.0
13400	Microprocessor	V200	Hamilton Avnet	700000-09-01	10/24/06	10/30/06	6.0	8.0	1.0
13400	Microprocessor	V200	Hamilton Avnet	700000-09-01	10/24/06	10/01/06	-23.0	8.0	3.0

The Excel Page that results from the export of the On Time Delivery:

On-Time Delivery for All Vendors between 2005-09 and 2006-10[1].xls - Microsoft Excel

Part Number	Description	Vend ID	Vendor Name	Order	Due Date	Receipt Date	Days Late	Order Qty	Receipt Qty
11000	Computer MAX	V300	Wagner Bulk Products	700000-14-01	9/23/2005	9/23/2005	0	2	2
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	-1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	-1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	1
12250	Cabinet, Gold Plated	V800	Peninsula Plating & Heat Treat	700000-10-01	5/4/2006	5/4/2006	0	1	1
13000	Keyboard	V200	Hamilton Avnet	700000-15-01	5/18/2006	5/4/2006	-14	1	1
13000	Keyboard	V200	Hamilton Avnet	700000-15-01	5/18/2006	5/4/2006	-14	1	1
13400	Microprocessor	V200	Hamilton Avnet	700000-09-01	10/24/2006	10/30/2006	6	8	1
13400	Microprocessor	V200	Hamilton Avnet	700000-09-01	10/24/2006	10/01/2006	-23	8	3