



**ix** ePROCUREMENT

UNITED PLANET INTREXX XTREME  
RELEASE 4.5

**Table of Contents**

**1. Licensing** ..... 2

**2. Settings** ..... 3

**3. Product Data**..... 4

3.1. Entering Product Categories and Sub-product Categories ..... 4

3.2. Entering Suppliers ..... 5

3.3. Entering Product Data ..... 6

**4. Products** ..... 8

**5. Approval Procedure** ..... 9


**6. Order Processing** ..... 10



**7. Purchase**..... 11







**8. Costs** ..... 12

**9. Automatic Notification By eMail**..... 12

**Writing Conventions**

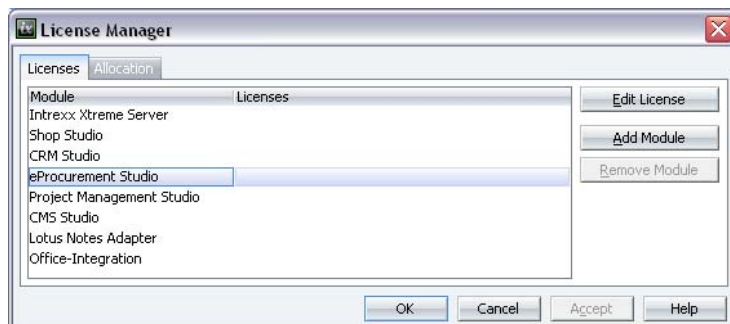
In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the  *Center* handbook. Programming code in the text will be displayed in the Courier font. Context menus can be opened by clicking with the right mouse button on the described element.

In the following, <xtreme> refers to your Intrex installation path; under Windows, for example, this is usually  C:\xtreme\. On Linux, the normal install path is  /opt/xtreme/. The following symbols will be used for designation of special kinds of information:

-  Important information
-  Tips and background information
-  References to additional information in an Intrex Xtreme handbook
-  Directories
-  URLs
-  Buttons in dialogs or assistants

**1. Licensing**

The eProcurement Studio will, like every Intrex Xtreme application, be created based on a template. You will find the *eProcurement Studio* template in the templates collection, which is reachable from the Application Designer. In order to use the application, you must purchase a license. Request the license from your software partner or from United Planet at the eMail address [info@unitedplanet.de](mailto:info@unitedplanet.de). The license key will be sent to you via eMail. In order to unlock the application, start the Intrex Xtreme Portal Manager. Open the License Manager from the menu *Extras / License Manager*.



Highlight the entry *eProcurement Studio* and then click on *Edit License*.

Enter your serial number here and then click *OK*. The eProcurement program has now been unlocked. You can create the application and use it in the browser.

**2. Settings**

Open the *eProcurement* application in the browser and select the *Settings* menu.

The *Default Currency* will be defined here. The currency symbol entered here will be used in eProcurement behind all price quotes. With the setting *Orders to be approved by superiors?*, you will activate the approval process. In the *Min. Approval Amount* field, enter an amount, above which the approval process will be required. Save your settings with *Accept*, then switch to the *Additions* tab.

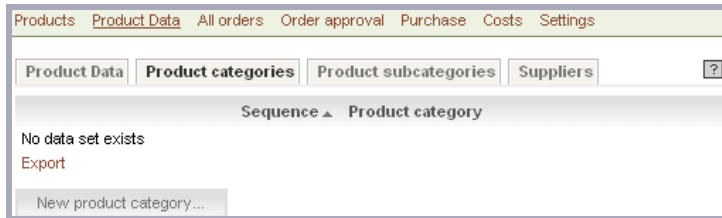
You can enter up to seven additional attributes for products here. For each one, enter a *Title* (such as *Color*). In the *Addition* field, multiple additional attributes can be entered. Separate multiple additions with a semicolon (such as *Red;Yellow;Blue*). Multiple

additions can be selected later on the ordering page from selection lists. Save your settings with *Accept*.

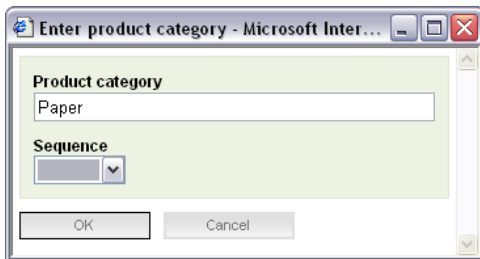
**3. Product Data**

**3.1.Entering Product Categories and Sub-product Categories**

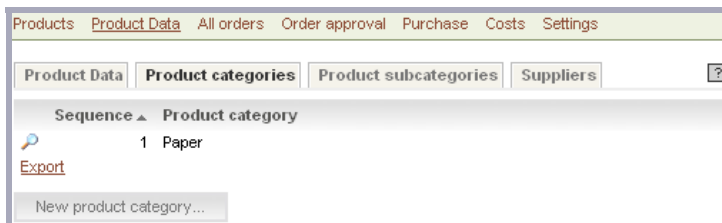
If you have newly created the *eProcurement* application, you should first enter product categories and sub-categories in the *Product data* menu on the *Product categories* tab.



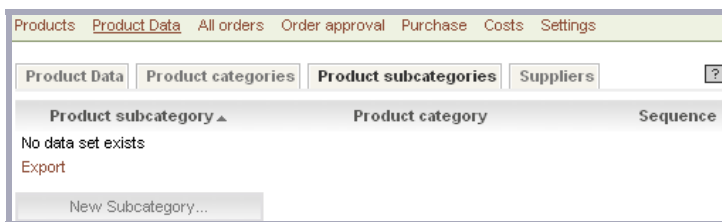
Click on *New Product Category*.



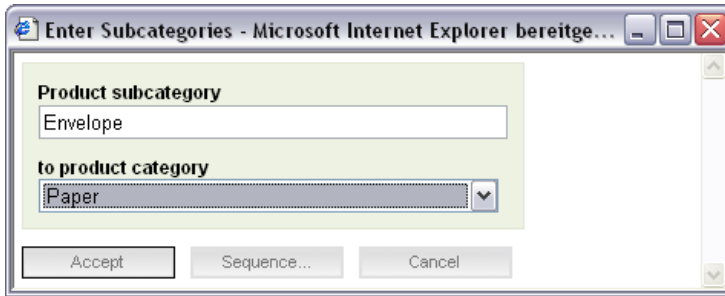
Enter the *Product Category* here. Each product category will be displayed on its own tab later in the *Products* menu. By entering the *Order*, you will define the order of these tabs from left to right. By clicking *OK*, the product category will be saved.



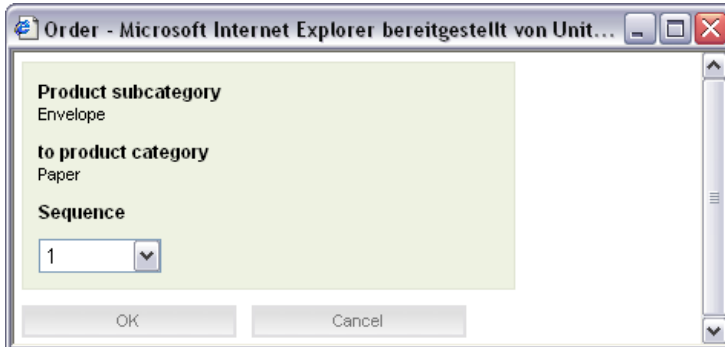
Next, please click the *Sub-Categories* tab.



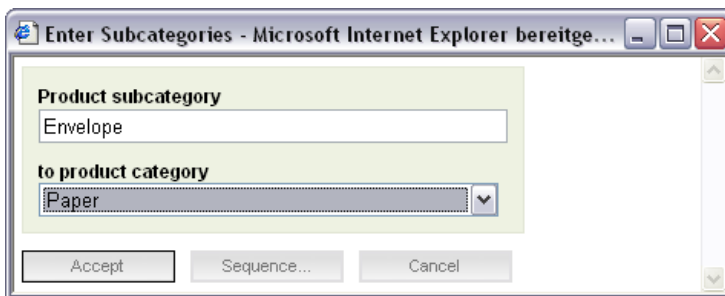
Click on *New Sub-Category*.



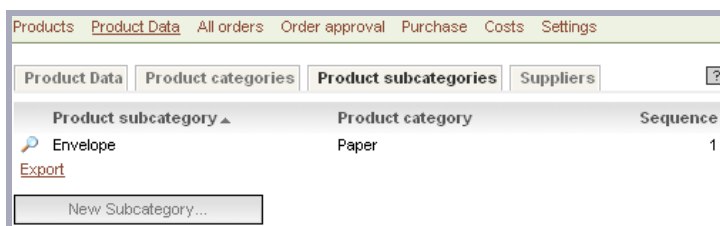
Enter the *Sub-Category* and assign it to the corresponding product category. In addition, you can also change the sorting order by clicking *Sequence*.



Click *OK* here.

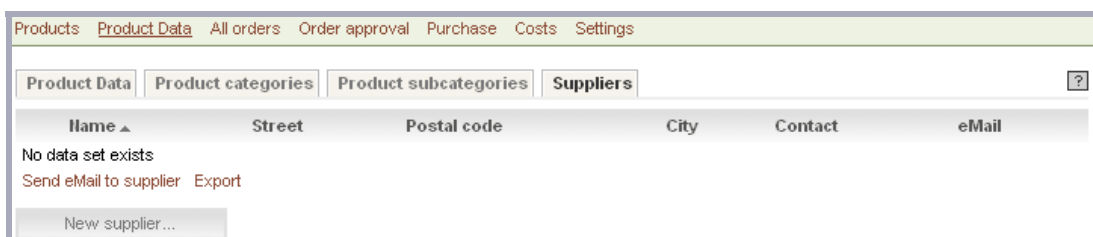


Click *Accept* to create the new product category.




### 3.2.Entering Suppliers

Switch to the *Suppliers* tab and enter the suppliers of products there.



Click  *New Supplier*.

Enter the address and contact data of a supplier here and save it with  *OK*.


Name	Street	Postal code	City	Contact	eMail
Miller	Street	Postal code	City	Contact	eMail@eMail.com

Whenever you see the link to *Export* below a table, you have the ability to export the displayed data in the form of a text or Excel file. With the link to *Send eMail to supplier*, an eMail can be sent to all suppliers. Additional information on these topics can be found in the *Application Designer* handbook.

### 3.3.Entering Product Data

Switch to the *Product Data* tab.

Item Number	Name	Price	Supplier	Minimum order quantity	Maximum order quantity
No data set exists					

All products will be listed in a table here with their *Product Number*, *Name*, *Price*, *Supplier*, and *Minimum* and *Maximum Order Quantity*. Click  *New Product*.


Product Data	Product categories	Product subcategories	Suppliers
<b>Product</b>			
Name <input type="text"/>			
Product number <input type="text"/>			
Supplier <input type="text"/>		Supplier product number <input type="text"/>	
Product category <input type="text"/>		Subcategory <input type="text"/>	
Price <input type="text"/>		VAT in % <input type="text"/>	
Order quantity	Min. <input type="text"/>	Max. <input type="text"/>	*0 - Unlimited order amount
Order additions	<input type="button" value="Change..."/>		
Title <input type="text"/>			
Brief description <input type="text"/>			
Description <input type="text"/>			
Small image <input type="text"/>		<input type="button" value="Durchsuchen..."/>	
Normal image <input type="text"/>		<input type="button" value="Durchsuchen..."/>	
Large image <input type="text"/>		<input type="button" value="Durchsuchen..."/>	
<input type="checkbox"/> Product blocked?			
<input checked="" type="checkbox"/> Link to view large image?			
<input checked="" type="checkbox"/> Display link to details?			
<input type="checkbox"/> not available?		<input type="text"/>	
<input type="button" value="Accept"/>			

Enter the *Product Name* and the *Product Number* here. Assign a *Supplier*, the *Product Category*, and the *Sub-Category* to it. In the *Supplier Product Number* field, the product number for the supplier can be entered. Enter the *Net price* and the *Value Added Tax*. Define the minimum order quantity and the maximum order quantity for this product. Clicking the button to *Change* will open a pop-up window in which a product addition can be selected.

Under *Title*, the title of the product will be entered, which will be shown on product pages as the product name. A short description and a description for the detailed view of the product can also be entered. With the *Browse* buttons, image files can be loaded.

The *Blocked Product* setting will cause the product to not be shown on the *All Products* page. It will also not be reachable from the product search. With the setting to *Show link to large image*, the product image will be shown as a link. Clicking this link will load the large image in a pop-up window. With the setting to *Show Link to Details*, the link to the

detail view mode will be shown. Products with the *Not Available* setting will be designated unavailable in order processing.

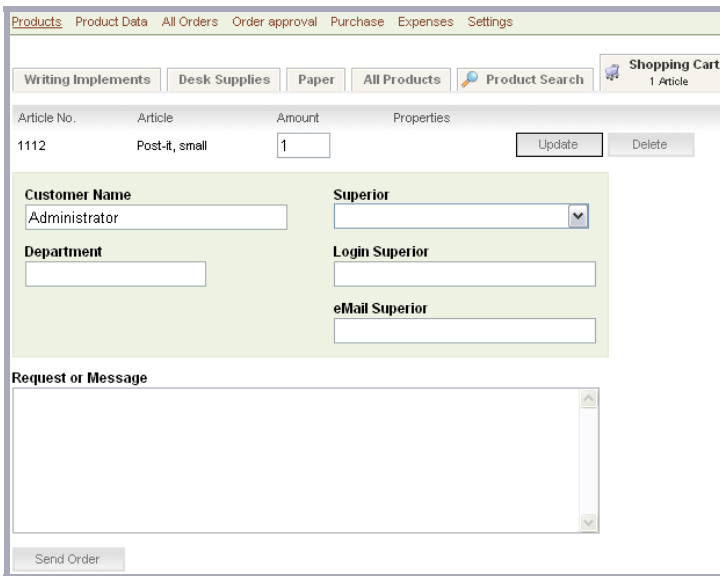
Clicking the *Accept* button will save the product. Clicking  *Accept* will create a copy of the product, which can be additionally edited.



**4. Products**


If you click on the *Products* menu, you will find yourself on the *All Products* tab. For each product category, an individual tab will be created automatically, on which only the products assigned to it will be available. By clicking the shopping cart symbol, the product can be ordered.

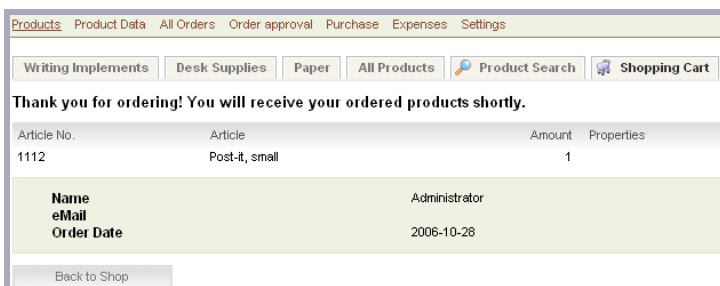


You can reach the shopping cart from the *Shopping Cart* tab. On this tab, the number of products that are currently in the shopping cart will be shown.




With  *Refresh*, the shopping cart will be refreshed, for example if you have changed the ordering quantity. With  *Delete*, an individual product can be removed from the cart.

The *Superior*, the *Superior Login*, and the *Superior eMail* will be automatically entered. By clicking  *Send Order*, the order process will be activated.




5. **Approval Procedure**

In the *Order Approval* menu, managers can reach an overview of not yet approved orders. Each superior will only see the orders for which he or she is responsible.

<a href="#">Products</a> <a href="#">Product Data</a> <a href="#">All orders</a> <a href="#">Order approval</a> <a href="#">Purchase</a> <a href="#">Costs</a> <a href="#">Settings</a>			
<b>Order approval</b>   <a href="#">All new orders</a>   <a href="#">All approved orders</a>   <a href="#">All denied orders</a>			
New orders			
Customer name ▲	Order date	eMail	
No data set exists			
Approved orders			
Customer name ▲	Order date	eMail	Approval date
 Administrator	2006-10-28		2006-10-28 7:32 PM
Orders not approved			
Customer name ▲	Order date	eMail	Approval date
No data set exists			

On the tabs *All New Orders*, *All Approved Orders*, and *All Denied Orders*, the orders will be filtered by their status. You have the ability there to enter a time frame and a department by which the orders will be additionally filtered. Click on the magnifying glass icon in the table if you wish to authorize an order.

<a href="#">Products</a> <a href="#">Product Data</a> <a href="#">All orders</a> <a href="#">Order approval</a> <a href="#">Purchase</a> <a href="#">Costs</a> <a href="#">Settings</a>					
<b>Order date</b> 28.10.2006					
<b>Orderer</b> Administrator					
<b>eMail orderer</b>					
<b>Comment / Request</b>					
Ordered products					
Product number ▲	Name	Not available	Amount	Costs	Total price
 1111	Envelope	<input type="checkbox"/>	1,00	6,00	6,00
<a href="#">Export</a>					
<b>Current status</b>					
<input type="radio"/> New <input type="radio"/> Denied <input checked="" type="radio"/> Approved					
<b>Date of approval/denial</b> <input type="text" value="2006-10-28 7:32 PM"/>					
<b>Comment</b> <input type="text"/>					
<input type="button" value="Approve"/> <input type="button" value="Deny"/> <input type="button" value="Delete"/> <input type="button" value="Overview"/>					

All parts of the order will be listed in a table. If a product has been designated as not deliverable in the product data, it will be shown in the *Not Available* column here. The *Current Status* of the order will be shown. The *Date of Approval / Denial* will be

automatically entered. The status of the order will be set via Approve or Deny. An approved order will be automatically sent to orders for further processing.

6. **Order Processing**

The order can now be edited from the *Orders* menu.

All order entries will be listed by status here. On the tabs *Product Search Partially Processed Orders* and *Product Search Processed Orders*, only the orders with the corresponding status will be listed. A new order can be opened and edited by clicking on the magnifying glass symbol.

If a product cannot be delivered, the order can be designated as *Partially Settled* via Status.

Click **OK** here in order to save the order status.

**7. Purchase**

On the *Purchase* page, all suppliers will be listed.

Products Product Data All orders Order approval <u>Purchase</u> Costs Settings						
Purchase at suppliers						
Name ▲	Street	Postal code	City	Contact	eMail	
Miller	Street	Postal code	City	Contact	eMail@eMail.com	

Click on the magnifying glass icon.

An order can be entered from selected suppliers here. Clicking *All Suppliers* will show the complete list of all orders from all suppliers. Please click *New Order*.

By clicking *Add Product*, a product can be added for ordering.

Select a product number from the *Internal Product Number* selection list. The other fields, with the exception of *Amount* and *Comment*, will be automatically filled out with the corresponding product data. By clicking *OK*, the product will be saved.

Product no.	Name	Amount	Price	VAT	Comment
7777	Envelope	5,00	6,00	0,00	

The order will be saved by clicking *Accept*. With *Delete*, the order will be deleted. With *Print*, the order can be printed out.

## 8. Costs

Under the *Costs* menu item, costs can be analyzed.

On the individual tabs, analyses by *Products*, *Departments*, *Employees*, and *Per Day* can be prepared. Additionally, the orders can be filtered by any time frame.

## 9. Automatic Notification By eMail

Every button in Intrex Xtreme can be configured for automatic sending of eMails. In eProcurement, information about the status of an order or processed order can be automatically passed on to employees or superiors in this way. For information on the setting up the sending of eMails, please consult the *Application Designer* handbook.