

Intrex Professional

Intrex Compact

RELEASE 5



eProcurement

Table of Contents


1. Licensing	4
2. Settings	4
3. Product Data	5
3.1. Entering Product Categories and Sub-product Categories.....	5
3.2. Entering Suppliers	6
3.3. Entering Product Data	7
4. Products	8
5. Approval Procedure	9
6. Order Processing	10
7. Purchase	10
8. Costs	11
9. Automatic Notification By eMail	12



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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  *Portals* 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, `<intrexx>` refers to your Intrexx installation path; under Windows, for example, this is usually  `c:\intrexx\`. On Linux, the normal install path is  `/opt/intrexx/`. The following symbols will be used for designation of special kinds of information:

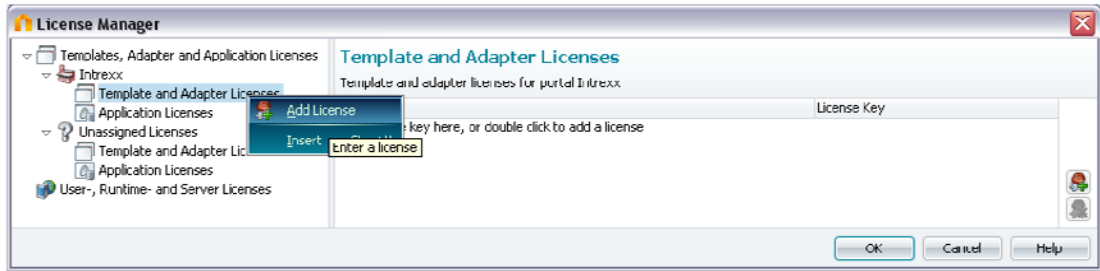
-  Information
-  References to an Intrexx handbook
-  Directories
-  URLs
-  Click on buttons

Background Knowledge

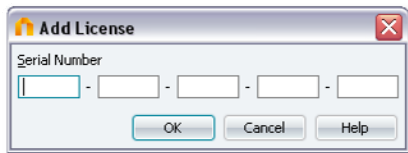
In order to understand this documentation, no special previous knowledge is required. Helpful information can be found in the Intrexx handbooks  *Portals* and  *Applications*.



1. Licensing

The *eProcurement Studio*, like every Intrexx application, will be created based on a template. You will find the *eProcurement Studio* template in the templates collection, which you can reach from the *Applications* module. In order to use the application you will need to purchase a license for it. Request the license from your software partner or from United Planet at the eMail address info@unitedplanet.de. The license key will be sent to you via eMail. In order to unlock the template, first open the Intrexx Portal Manager. Open the License Manager by clicking *Extras / License Manager*.



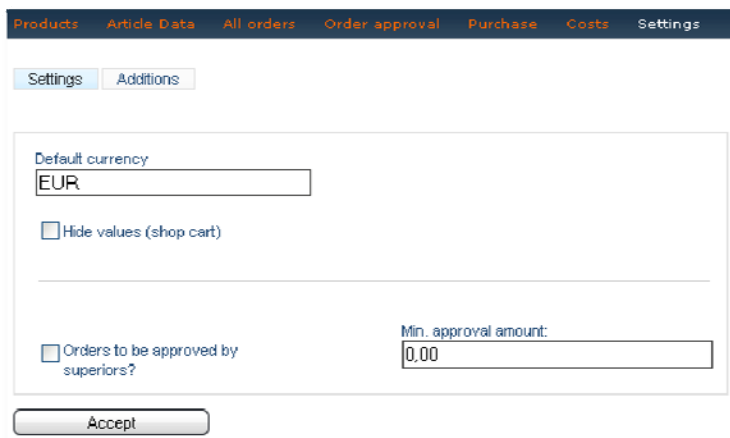
For the *Template and Adapter Licenses* entry, select *Add License* from the context menu.




Enter your serial number here and then click  *OK*. You can now create the *eProcurement* in the *Applications* module as a normal application using the *eProcurement Studio* template. You can find more information on this topic in the  *Applications* handbook.

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 , then switch to the *Additions* tab.



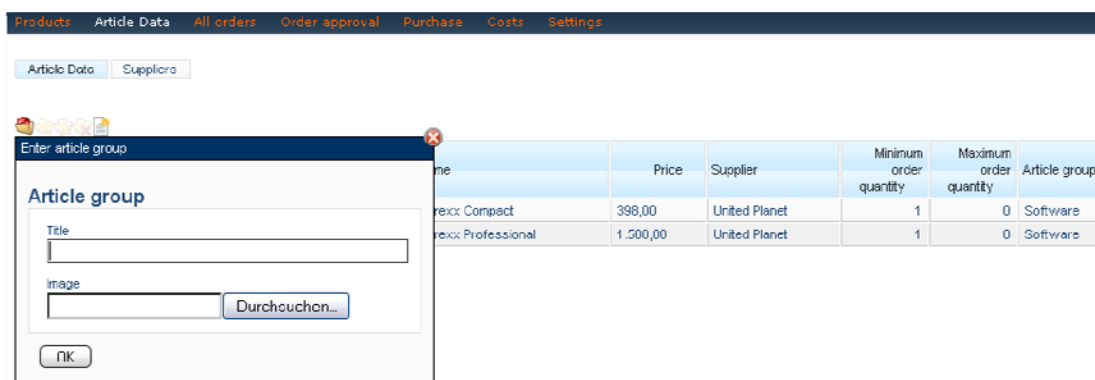
The screenshot shows the 'Additions' tab in the software interface. At the top, there are navigation tabs: Products, Article Data, All orders, Order approval, Purchase, Costs, and Settings. Below these, there are sub-tabs: Settings and Additions. The main content area contains a text box with instructions: "You can add up to 7 definitions to your article data (e.g. color, size, etc.). You can enter afterwards in the master data of each article which of these additional attributes will be used. If you enter the addition (for example) 'red;blue,yellow', the article view page will show a selection list with these three values available." Below this are seven rows, each with a 'Title' field and an 'Addition' field. At the bottom, there is an 'Accept' button.

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 .

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 *Article data* menu.



The screenshot shows the 'Article Data' menu in the software interface. At the top, there are navigation tabs: Products, Article Data, All orders, Order approval, Purchase, Costs, and Settings. Below these, there are sub-tabs: Article Data and Suppliers. The main content area shows a table with columns: Name, Price, Supplier, Minimum order quantity, Maximum order quantity, and Article group. The table contains two rows of data. Overlaid on the table is a modal window titled 'Enter article group' with a close button (X). The modal window has a title bar 'Article group' and two input fields: 'Title' and 'Image'. Below the 'Image' field is a 'Durchsuchen...' button. At the bottom of the modal window, there is an 'OK' button.

Name	Price	Supplier	Minimum order quantity	Maximum order quantity	Article group
Intrexx Compact	398,00	United Planet	1	0	Software
Intrexx Professional	1.500,00	United Planet	1	0	Software

Click  *Create Product Category*. Enter the *Product category* here. Select an image as icon for the product group. By clicking , the product category will be saved.

Products Article Data All orders Order approval Purchase Costs Settings

Article Data Suppliers

Software Hardware

Item Number	Name	Price	Supplier	Minimum order quantity	Maximum order quantity	Article group
IC123	Intrex: Compact	399,00	United Planet	1	0	Software
IP123	Intrex: Professional	1.500,00	United Planet	1	0	Software

Below this product category any amount of sub-ordinate groups can be created. All information on this topic you will find in the handbook *Application Templates*, chapter *Empty Application - Tree Structure*.

3.2. Entering Suppliers

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

Products Article Data All orders Order approval Purchase Costs Settings

Article Data Suppliers

Name	Street	Postal code	City	Contact	eMail
United Planet					

Send eMail to supplier Export

New supplier...

Click *New Supplier*.

Enter suppliers - Intrex - Mozilla Firefox

http://localhost/intrex/default.asp?rq_SourcePageGuid=23075A959EC125725299AB18AB1BEC8

Name

Street

Postal code

City

Contact

eMail

OK Cancel

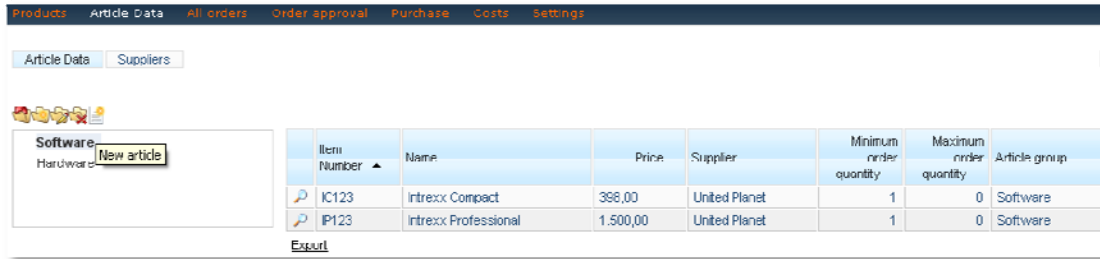
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Enter the address and contact data of a supplier here and save it with *OK*.

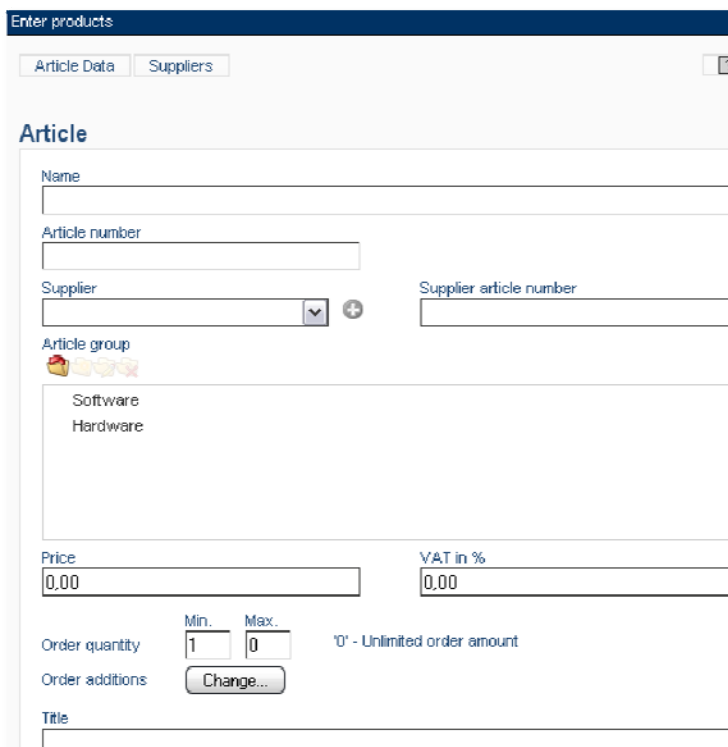
Whenever you see the link to *Export* below a table, you have the ability to export the displayed data in the form of a text or Excel file. The link to *Send eMail to suppliers* allows you to send an eMail to all suppliers. Additional information on these topics can be found in the *Applications* handbook.

3.3. Entering Product Data

Switch to the *Product Data* tab.



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




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.

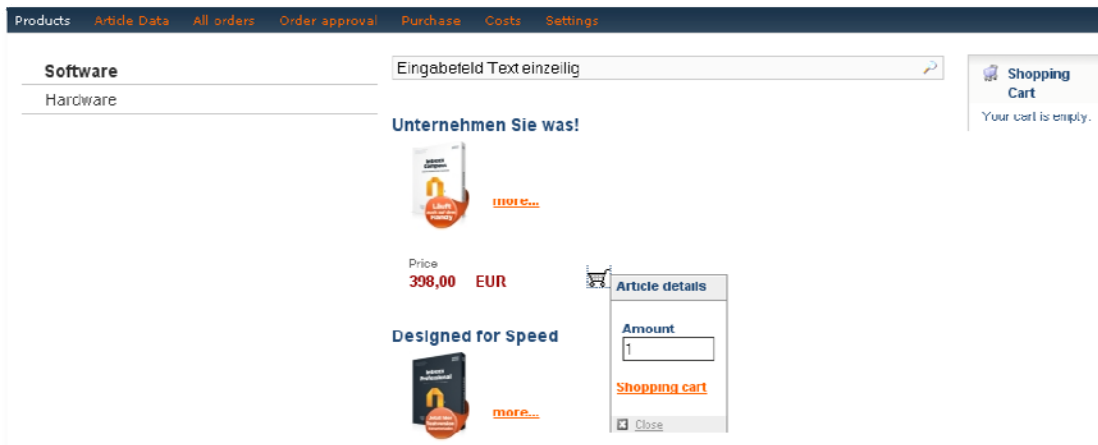
Clicking the *Accept* button will save the product. Clicking  *Accept* will create a copy of the product, which can be additionally edited.

4. Products

If you click the *Products* menu, you will find yourself on the main page of the shop. In the left area you will see the product categories. In the middle the contained products will be displayed. The view of the shopping cart you will find in the right area.



By clicking on the shopping cart symbol, a product can be ordered.



Click on the shopping cart in the right area.

Shopping cart

Schaltfläche

Article No.	Article	Amount	VAT	Price	Total Price	Properties
IC123	Intrexx Compact	<input type="text" value="1"/>	0,00 %	398,00 EUR	398,00 EUR	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Total Net Sum 398,00 EUR
Plus VAT 0,00 EUR
Invoice Total 398,00 EUR
Incl. VAT 0,00 EUR

Customer name Superior

Department Login superior

eMail superior

Request or Message

With *Update*, 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.

Products Article Data All orders Order approval Purchase Costs Settings

Order approval All new orders All approved orders All denied orders

New orders

Customer name	Order date	eMail
No data set exists		

Approved orders

Customer name	Order date	eMail	Approval date
No data set exists			

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.

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 *All approved Orders* and *All denied 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.

7. Purchase

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

Name	Street	Postal code	City	Contact
United Planet				

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.

Products Article Data All orders Order approval Purchase Costs Settings

Supplier
United Planet
Contact

Street

Postal code

City

Order date
09.03.2010

Table

Article no. ▲	Name	Amount	Price	VAT	Comment
No data set exists					

Export

Accept Add article... Back

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

Enter products - Intrexx - Mozilla Firefox

http://localhost/intrexx/default.asp?rq_SourcePageGuid=31B1E42399E808A268A44A15FD47E677BCI

Internal article number

Supplier article number

Name

Comment


Price




VAT

Amount

OK Cancel

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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.

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.

Products Article Data All orders Order approval Purchase Costs Settings


Costs Expenses by article Expenses by department Expenses per employee Costs per day

Order date -

Total costs ▲ 0,00

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 Intrexx 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  *Applications* handbook.