CEI Supplier Portal

User Manual

Version: v3.0

Draft: January 16, 2013 (Mimi Luk)

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1. INTRODUCTION

This manual illustrates how to perform operations in the CEI Supplier Portal regarding:

- Pending purchase order (PO) download
- Pending purchase order (PO) ETD confirmation
- Pending letter of guarantee (LG) Submission
- User account management
- Support and Others

2. GETTING STARTED

2.1. System Requirement

The CEI Supplier Portal is an online portal that can be accessed from any machine with a valid internet connection and supported internet browser.

Supported Internet Browsers include:
- IE 9 or above
- Firefox 4.0 or above
- Google Chrome Latest Version

2.2. Turn off browser compatibility view settings.

If you are using IE8 or above, after logging in, if supplier portal displays the "Browser not supported" page. Please turn off compatibility view settings because compatibility view mode renders the website as older IE version.
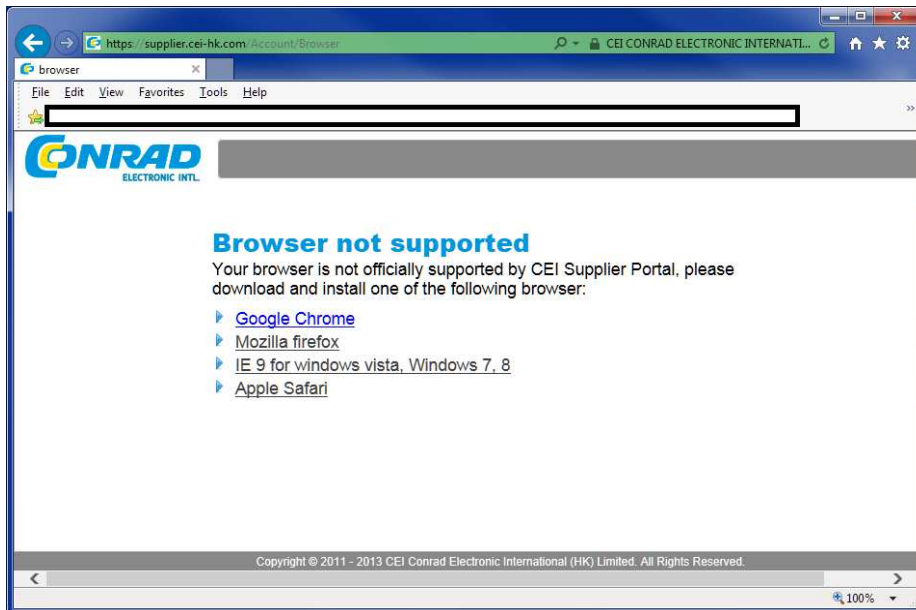

Fig 1: Browser not support

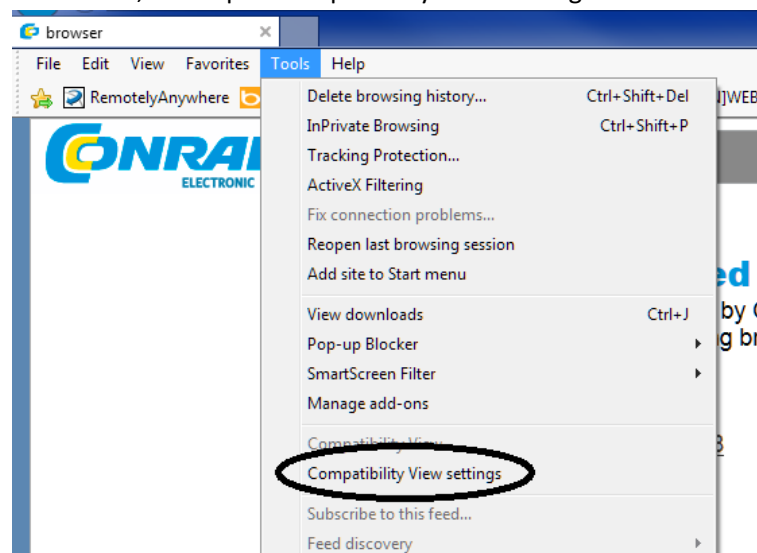Press "Alt" to show the menu, then open Compatibility View settings.

Fig 2: Compatibility View Setting

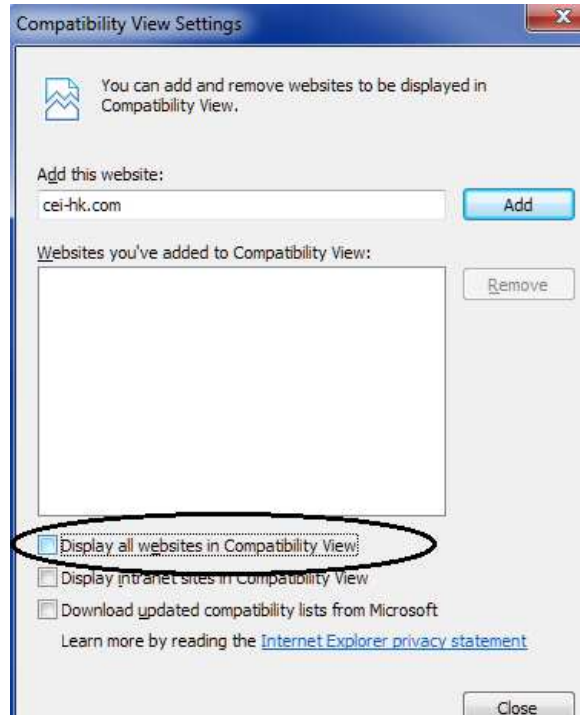Then turn off "Display all websites in Compatibility View"

Fig 3. Turn off compatibility View

2.3. Login

During account activation, you were given a set of login information including Supplier No. and Username, and should already setup the initial password during the activation process. Please keep this login information in a safe place.

To login to CEI Supplier Portal, enter the below URL into your internet browser:

http://supplier.cei-hk.com

You will be directed to the CEI Supplier Portal login screen as below:
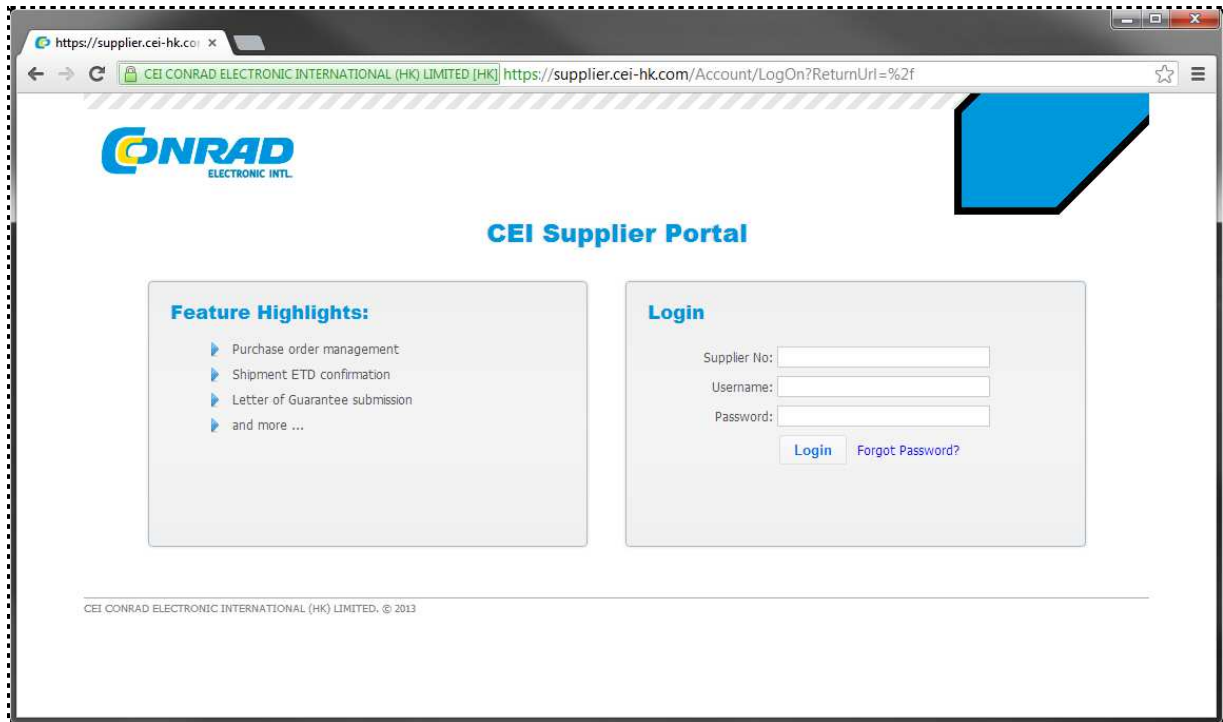

Fig 4: CEI Supplier Portal login screen

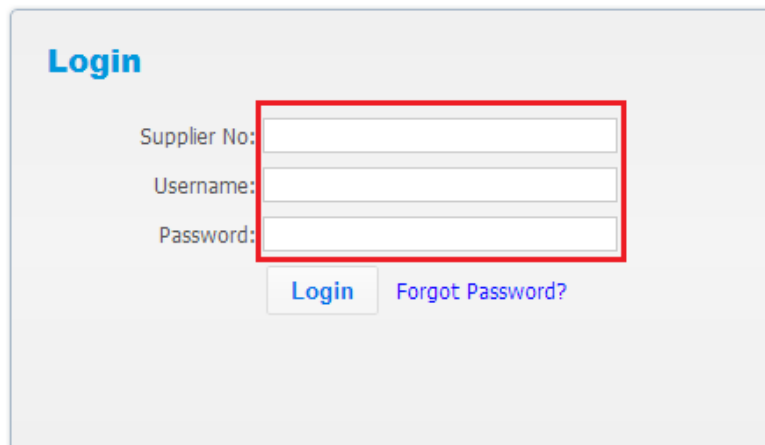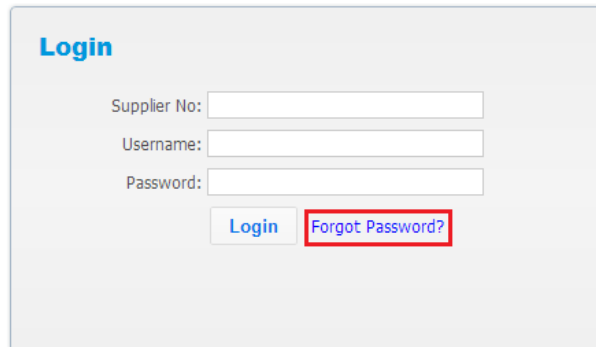Enter the Supplier No., Username, and Password. Click "Login".

Fig 5: Enter login details

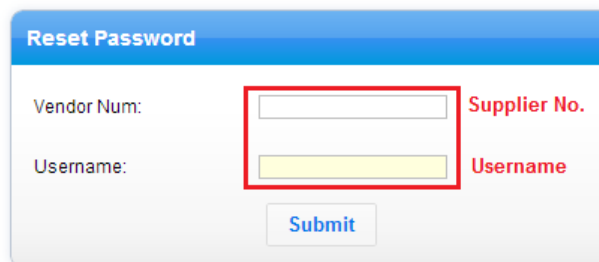You would be taken to the Home screen upon successful login.

2.3 Forgot Password

If you lost your login password, you can reset your password by clicking on the 'Forgot Password?' link.
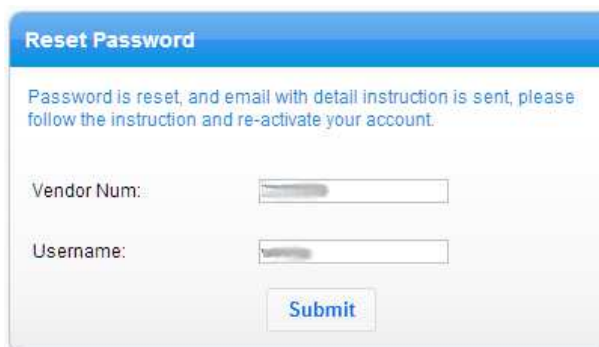

Fig 6: Forgot Password link

You will be taken to the Reset Password screen. Enter your Supplier No. and Username, and then click 'Submit'.

Fig 7: Enter details to reset password

Your password will be reset and a confirmation e-mail containing the new password information will be sent to you. You can use the new login information to access the CEI Supplier Portal.

Fig 8: Password reset

2.4 Home Screen (Overview page)

Upon successful login, the Supplier Portal Home screen will be shown.
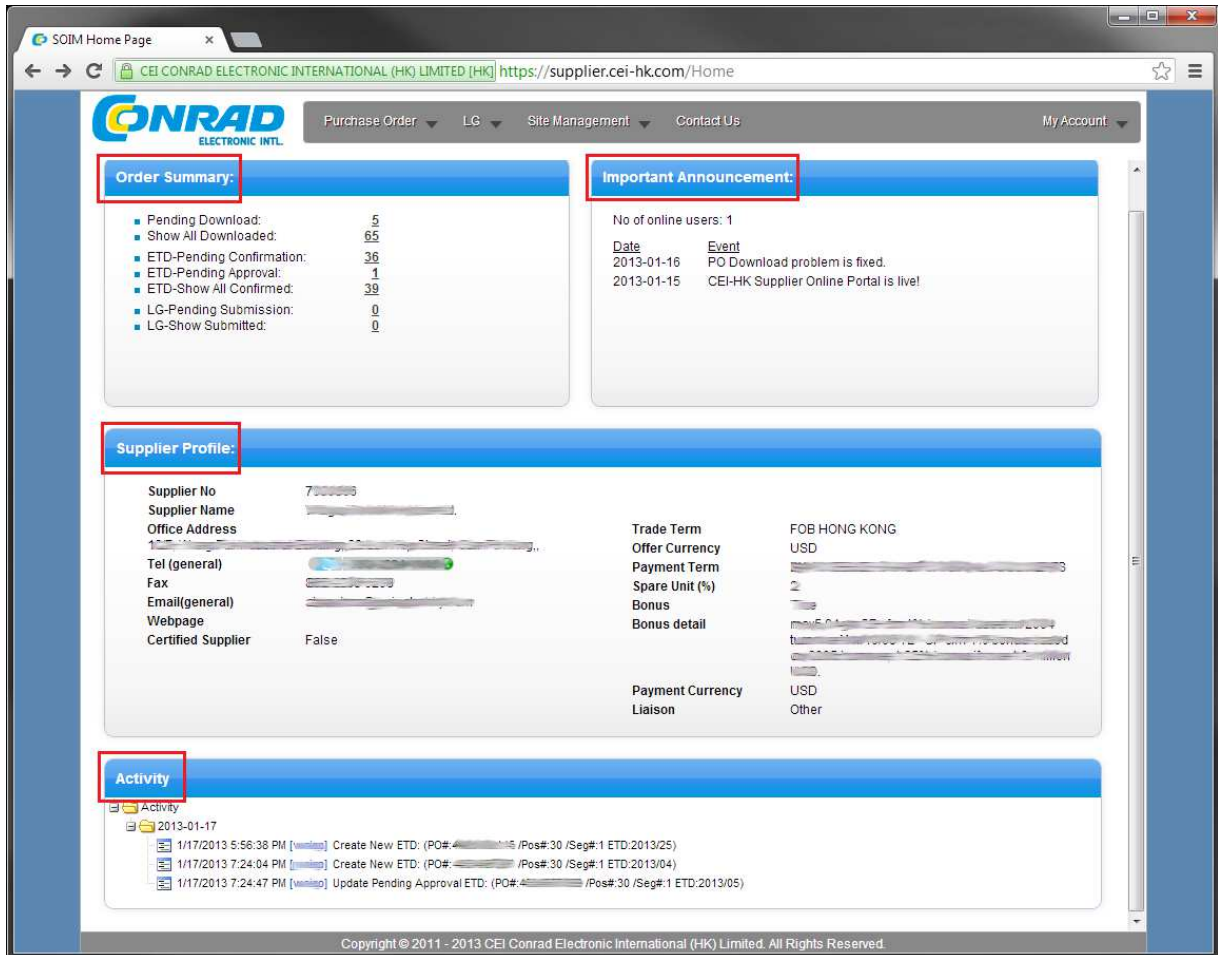

Fig 9: Supplier Portal Home screen

The Home screen serves as an overview page for the important details:

> Order summary

- Pending Download: Total no. of PO pending for downloads
- Show All Downloaded: Total no. of PO downloaded
- ETD-Pending Confirmation: Total no. of ETD pending for confirmation
- ETD-Pending Approval: Total no. of ETD pending for CEI approval
- ETD-Show All Confirmed: Total no. of ETD confirmed
- LG-Pending Submission: Total no. of LG pending for Submission
- LG-Show Submitted: Total no. of LG submitted

> Important Announcement

- Total no. of online users
- Latest CEI activities / important messages

> Supplier Profile

- Your company contact / trading information

Note: If you find any outdated information is displayed, please kindly notify your CEI Merchandiser contact for revision.

> Activity

- Log history of all user account activity sorted by date and user

2.5 General Navigation

To navigate to different sections within the Supplier Portal, you can access from:

- Top menu bar
- Links within overview summary

Brief explanation can be found from Fig 6 below:

a) CONRAD ELECTRONIC INTL. Logo: Return to Home screen
b) Menu bar items: Link to captioned section or show sub-menu
c) Sub-menu items: Link to captioned section
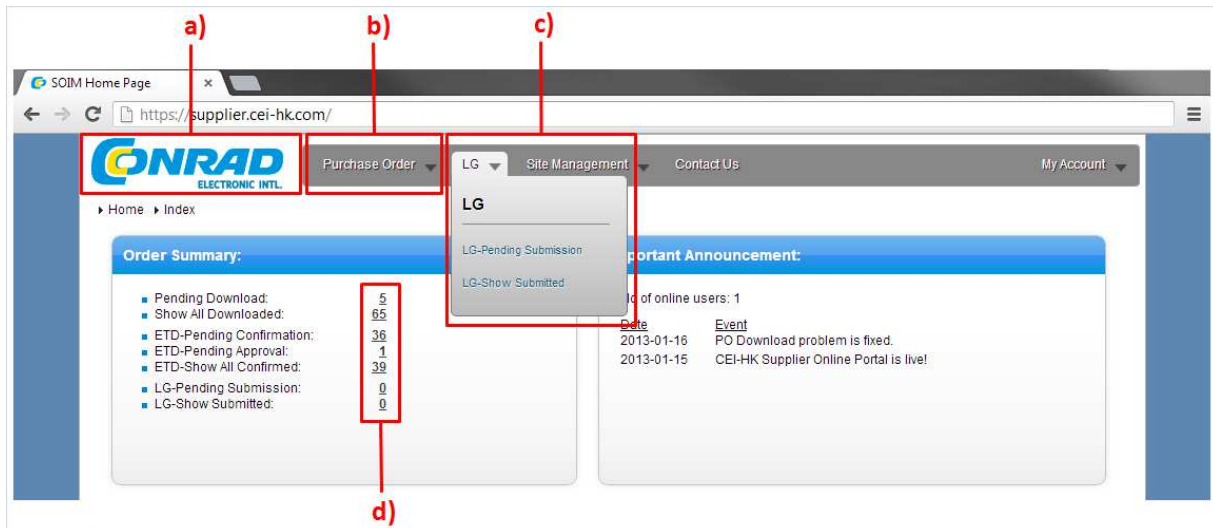d) Overview summary: Link to relevant section

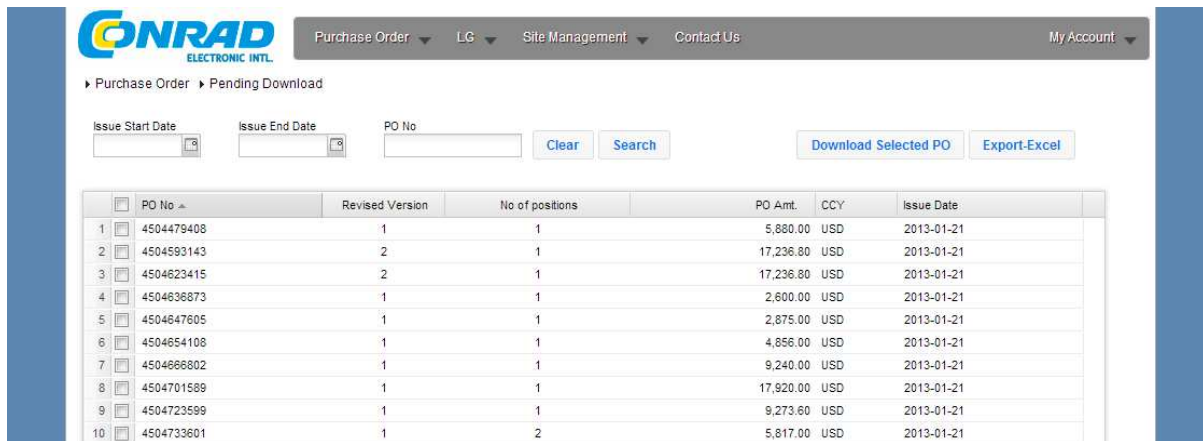Fig 10: Supplier Portal navigation

3. Purchase Order

In the Purchase Order section, you can review the following to manage your Purchase Orders (PO):

- Pending Download: All PO that have not been downloaded yet
- Show All Download: All PO that have been downloaded previously

3.1 Pending Download

To download <u>new</u> or <u>revised</u> PO, go to Purchase Order -> Pending Download from the top menu bar. At the Pending Download section, list of all PO that are not downloaded yet (pending for download) is shown. Here you can Download PO, Search for specific PO, or Export the PO list.

Fig 11: Pending Download section

3.1.1 Identifying new/revised PO

- To identify new/revised PO, check the "Revised Version" column.
- If no "Revised Version" number is shown, the PO is new.
- If a "Revised Version" number is shown, the PO is a revised PO (1=1st revision, 2=2nd revision, and so on).

Fig 12: Identifying new/revised PO

3.1.2 Downloading PO

- To download specific PO, select target PO by marking the checkbox (more than one checkbox can be marked). Marking the checkbox at the top of the column will select ALL PO.
- Click on "Download Selected PO" to start downloading the .zip file.

Fig 12: Select target PO to download

- Upon successful download, the selected PO will disappear from the Pending Download section. You will be able to access the downloaded PO in the Show All Downloaded section (see 3.2).
- The downloaded .zip file contains all selected PO and Purchasing Term document in .pdf format.
- To review downloaded PO, unzip the .zip file to your preferred location and check individual PO.

Fig 13: Downloaded PO included in .zip file

3.1.3 Searching PO

You can search specific PO within the Pending Download section by two criteria: Issue date or PO No.

- To search PO by issue date, set the PO issue date range by clicking on the calendar icon to select date for Issue Start Date and End Date. Click on "Search".
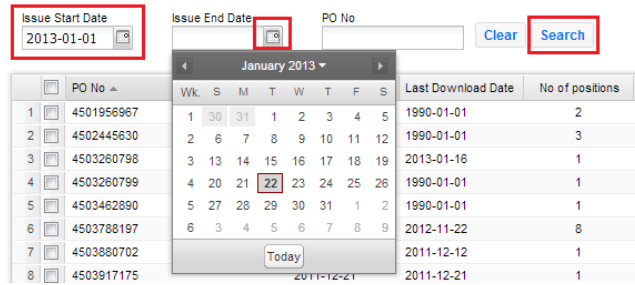- All pending PO matching the specified issue date range will be displayed.

Fig 14: Search Pending PO by issue date

- To search PO by PO No., enter the target PO No. in the PO No. field, and click on "Search".
- The PO matching the specified PO No. will be displayed.
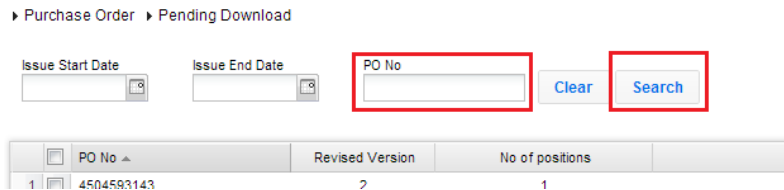
Fig 15: Search Pending PO by PO No.

- To clear search results, click on "Clear" and then followed by "Search".
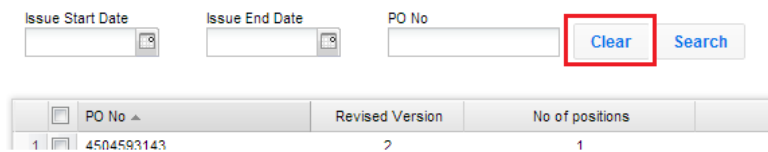
Fig 16: Clear search results

3.1.4 Export to Excel

Selected entries in the list of Pending Download section can be exported to excel.

- To export list of selected PO to excel, select target PO by marking the checkbox (more than one checkbox can be marked). Marking the checkbox at the top of the column will select ALL PO.
- Click on "Export-Excel" to export selected entries to excel file.

Fig 17: Export to excel

3.2 Show All Download

To view/re-download a list of all previously downloaded PO, go to Purchase Order -> Show All Download from the top menu bar. At the Show All Download section, list of all PO that have been previously downloaded is shown. Here you can re-download PO, Search for specific PO, or Export the PO list.

Fig 18: Show All Download section

3.2.1 Downloading PO

PO that have been previously downloaded can be downloaded again.

- To download specific PO again, select target PO by marking the checkbox (more than one checkbox can be marked). Marking the checkbox at the top of the column will select ALL PO.
- Click on "Download Selected PO" to start downloading the .zip file.

Fig 19: Select target PO to re-download

- The downloaded .zip file contains all selected PO and Purchasing Term document in .pdf format.
- To review the re-downloaded PO, unzip the .zip file to your preferred location and check individual PO.

3.2.2 Searching PO

You can search specific PO within the Show All Download section by two criteria: Issue date or PO No.

- To search PO by issue date, set the PO issue date range by clicking on the calendar icon to select date for Issue Start Date and End Date. Click on "Search".
- All previously downloaded PO matching the specified issue date range will be displayed.

Fig 20: Search Pending PO by issue date

- To search PO by PO No., enter the target PO No. in the PO No. field, and click on "Search".

- The previously downloaded PO matching the specified PO No. will be displayed.

Fig 21: Search Pending PO by PO No.

- To clear search results, click on "Clear" and then followed by "Search".

Fig 22: Clear search results

3.2.3 Export to Excel

Selected entries in the list of Show All Download section can be exported to excel.

- To export list of selected PO to excel, select target PO by marking the checkbox (more than one checkbox can be marked). Marking the checkbox at the top of the column will select ALL PO.
- Click on "Export-Excel" to export selected entries to excel file.
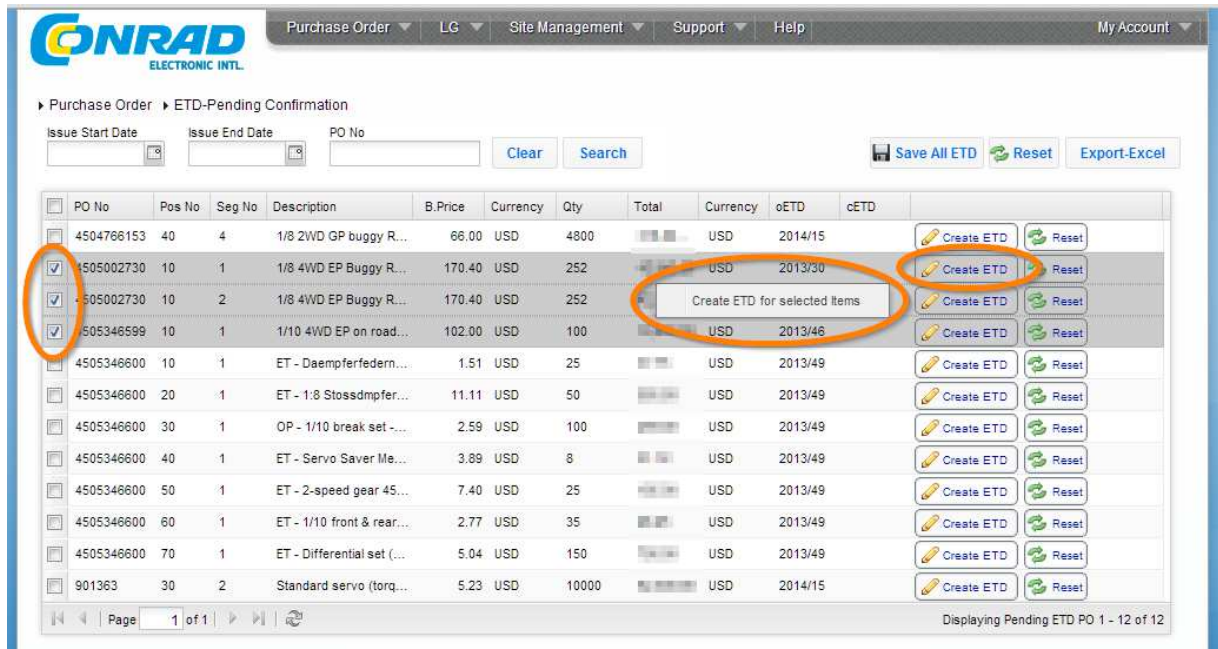
Fig 23: Export to excel

4. ETD Confirmation

In the ETD Confirmation section, you can review the following to communicate shipment ETD with CEI:

- ETD-Pending Confirmation: All PO awaiting for ETD confirmation
- ETD-Pending Approval: All PO awaiting CEI's approval on submitted ETD
- ETD-Show All Confirmed: All PO with confirmed ETD by Supplier & CEI

4.1 ETD-Pending Confirmation

To confirm ETD for outstanding PO, go to Purchase Order -> ETD-Pending Confirmation from the top menu bar. At the ETD-Pending Confirmation section, list of all PO that are awaiting ETD confirmation is shown. Here you can Confirm pending ETD, Search for specific PO, or Export the PO list.

Fig 24: ETD-Pending Confirmation section

4.1.1 Customize column view
You can customize the column view according to your preference:

- Move columns
- Sort ascending/descending for each column
- Choose display columns

Fig 25: Customize column view

4.1.2 Confirm pending ETD

- To enter ETD for a specific PO, click [Create ETD] , alternatively, you can enter a ETD for multiple PO items.
- To Enter ETD for multiple PO items, turn on the checkbox on the first column> right click > click [Create ETD for selected items]

Fig 26: Expand and show PO details
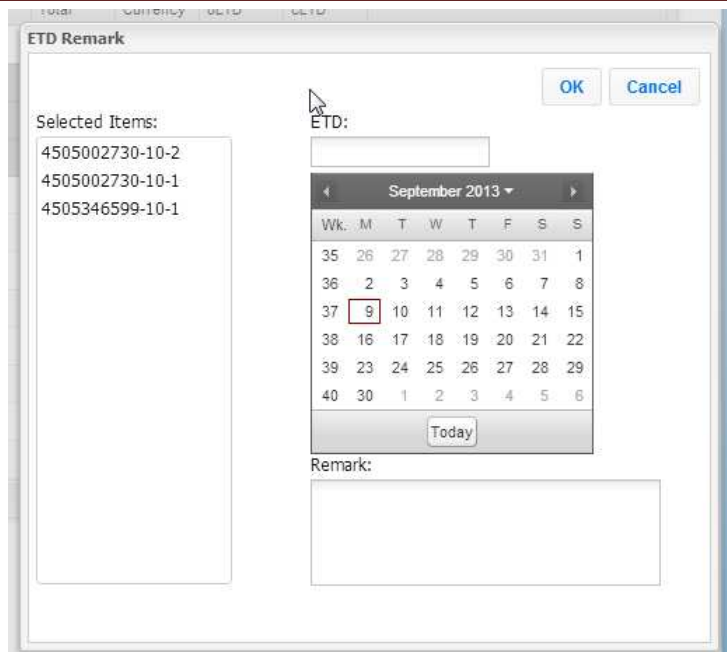
- Enters the ETD by click on the calendar or key in the ETD text box.
- Enter your remarks in the Remarks field if necessary.
- You can clear entered information by clicking the 'Clear' button before saving.
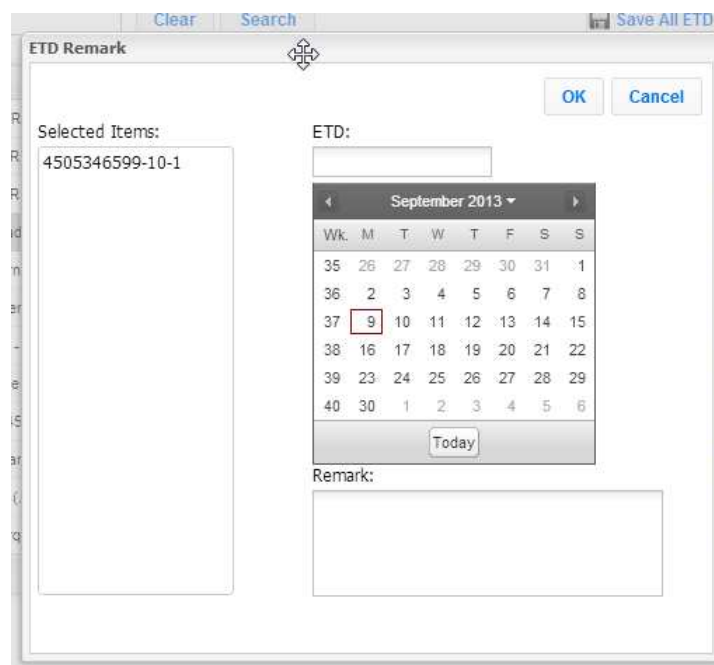

Fig 28: Enter ETD for individual order line within a PO

- Enter your remarks in the Remarks field if necessary.

- You can clear entered information by clicking the 'Clear' button before saving.
- After reviewing the entered ETD is correct, click on 'Save All ETD' button to save the confirmed ETD.

  The ETD is now confirmed by your side. The confirmed order line will disappear from the ETD-Pending Confirmation section, and appear in the ETD-Pending Approval section, which will await CEI's action to approve the submitted ETD (see 4.1.2).

4.1.3 Searching PO

You can search specific PO by two criteria: Issue date or PO No.

- To search PO by issue date, set the PO issue date range by clicking on the calendar icon to select date for Issue Start Date and End Date. Click on "Search".
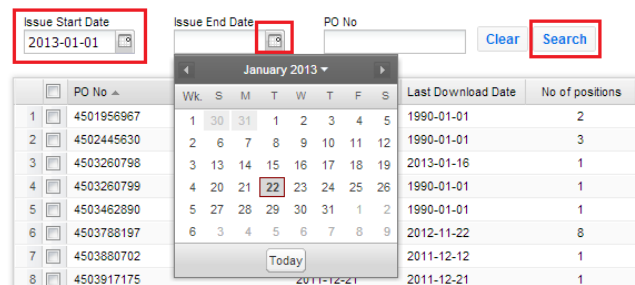- All pending PO matching the specified issue date range will be displayed.

Fig 29: Search Pending ETD PO by issue date

- To search PO by PO No., enter the target PO No. in the PO No. field, and click on "Search".
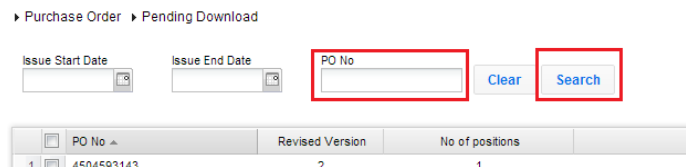- The PO matching the specified PO No. will be displayed.

Fig 30: Search Pending ETD PO by PO No.

- To clear search results, click on "Clear" and then followed by "Search".
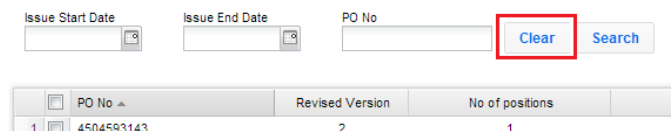

Fig 31: Clear search results

4.1.4 Export to Excel

All entries in the ETD-Pending Confirmation section can be exported to excel.

- Click on "Export-Excel" to export selected entries to excel file.

Fig 32: Export to excel

4.2 ETD-Pending Approval

To check the list of all PO awaiting CEI's approval on the submitted ETD, go to Purchase Order -> ETD-Pending Approval from the top menu bar. Here you can Revise submitted ETD, Cancel submitted ETD, Search for specific PO, or Export the PO list.

Fig 33: ETD-Pending Approval section

4.2.1 Revise previously submitted ETD

PO listed in this section contains ETD previously submitted by supplier and awaiting CEI approval. You can revise and resubmit ETD again in this section. Follow the same procedure outlined in 4.1.2 and save the revised ETD. CEI will approve the latest ETD in return.

4.2.2 Cancel previously submitted ETD

To cancel previously submitted ETD, expand the order to show all order lines. Click on 'Cancel' to cancel the corresponding item entry. The cancelled entry will disappear from the ETD-Pending Approval section and re-appear in ETD-Pending Confirmation again. You can then confirm ETD at a later stage when the ETD is known.

Fig 32: Cancel previously submitted ETD in ETD-Pending Approval section

4.2.3 Searching PO

Similar to ETD-Pending Confirmation section, you can search specific PO by two criteria: Issue date or PO No. in the ETD-Pending Approval section also. Please refer to the procedures outlined in 4.1.3.

4.2.4 Export to Excel

Similar to ETD-Pending Confirmation section, all entries in the ETD-Pending Approval section can be exported to excel. Please refer to the procedures outlined in 4.1.3.

4.3 ETD-Show All Confirmed

To view a list of confirmed ETD by supplier and CEI, go to Purchase Order -> ETD-Show All Confirmed from the top menu bar. Here you can Revise previously confirmed ETD, Search for specific PO, or Export the PO list.

Fig 34: ETD-Show All Confirmed section

4.3.1 Revise previously confirmed ETD

PO listed in this section contains all ETD confirmed by supplier and CEI. You can revise and resubmit ETD again in this section. Follow the same procedure outlined in 4.1.2 and save the revised ETD. The entry will disappear from the ETD-Show All Confirmed section and appear in ETD-Pending Approval section to await CEI's approval.
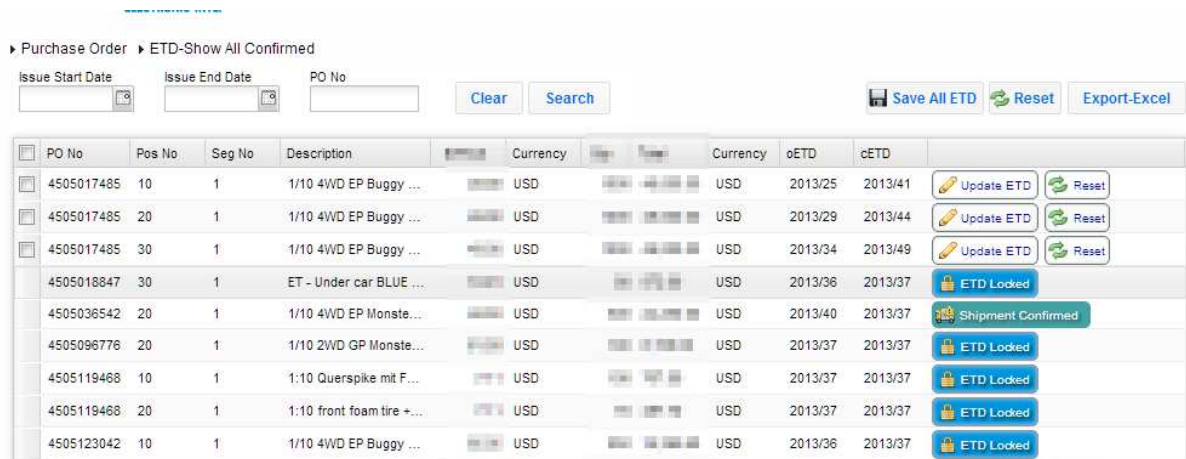
4.3.2 Searching PO

Similar to ETD-Pending Confirmation section, you can search specific PO by two criteria: Issue date or PO No. in the ETD-Pending Approval section also. Please refer to the procedures outlined in 4.1.3.

4.3.3 Export to Excel

Similar to ETD-Pending Confirmation section, all entries in the ETD-Show All Confirmed section can be exported to excel. Please refer to the procedures outlined in 4.1.3.
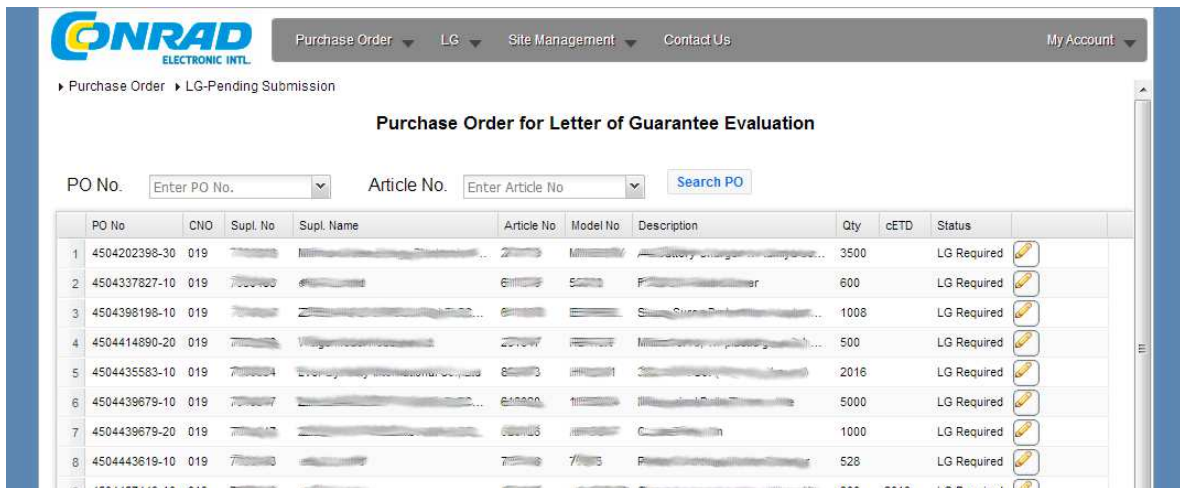
5. Letter of Guarantee (LG)

In the LG section, you can review the following to communicate manage submission of LG:

- LG-Pending Submission: All PO required for LG submission
- LG-Show Submitted: All PO with submitted LG

5.1 LG-Pending Submission

To view list of orders which requires submission of LG, go to LG -> LG-Pending Submission from the top menu bar. Here you can Create & Submit LG and Search for PO which has pending LG.

Fig 35: LG-Pending Submission section

5.1.1 Customize column view

You can customize the column view according to your preference:

- Move columns
- Sort ascending/descending for each column
- Choose display columns

Fig 36: Customize column view

5.1.2 Create LG for submission

- To create required LG, click on the 'pen' icon. It will take you to the LG creation page.
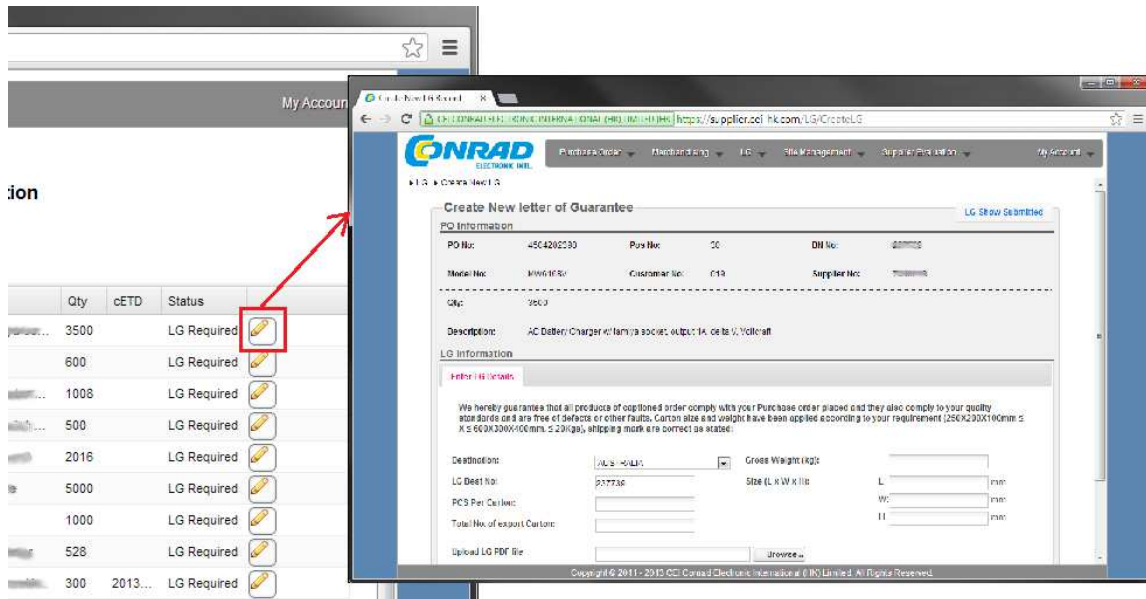

Fig 37: Create LG

- At the LG creation page, perform the following:
  - Check PO Information
  - Enter LG Details
    > Destination
    > LG Best No:

> PCS Per Carton

> Total No. of Export Carton

> Gross Weight (kg)

> Size (L x W x H)

- Upload LG PDF file if necessary

- To submit created LG, click on 'Submit' button.

Fig 38: Submit created LG

5.1.3 Searching PO with pending LG

At the LG-Pending Submission section, you can search specific PO by two criteria: PO No. or Article no.

- To search PO by PO No., enter the target PO No. in the PO No. field, and click on "Search PO". The PO matching the specified PO No. will be displayed.

Fig 39: Search Pending LG PO by PO no.

- To search PO by Article No., enter the target Article No. in the Article No. field, and click on "Search PO". The PO matching the specified Article No. will be displayed.

Fig 40: Search Pending LG PO by Article No.

5.2 LG-Show Submitted

To view list of orders which contains previously submitted LG, go to LG -> LG-Show Submitted from the top menu bar. Here you can View submitted LG, Revise & Re-submit LG, and Search for LG.

Fig 41: LG-Show Submitted section

5.2.1 View submitted LG

- To view previously created LG, click on the 'View' icon. It will take you to the LG detail page.
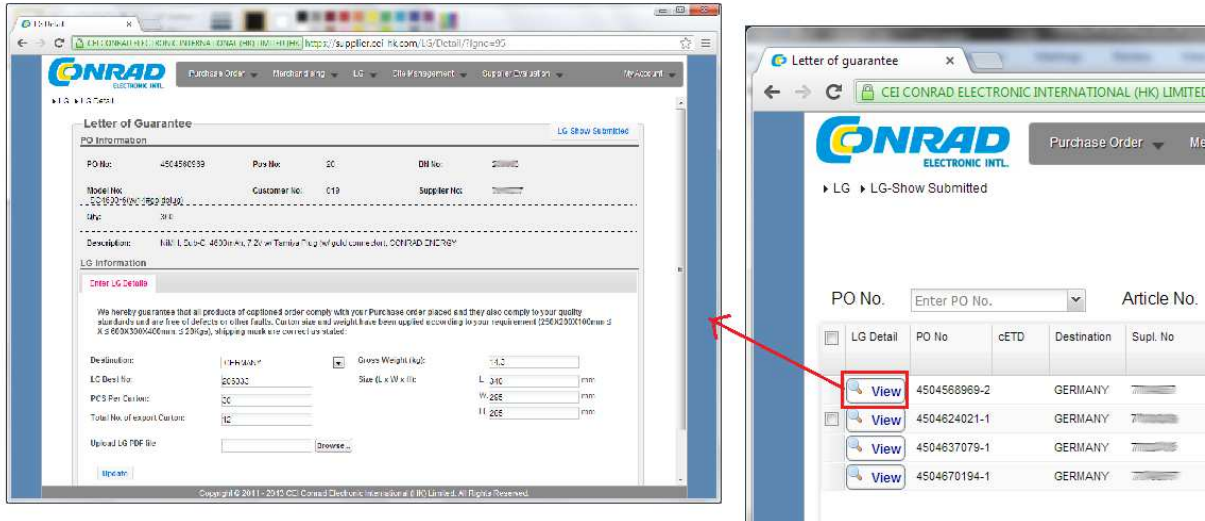
Fig 42: Viewing submitted LG

5.2.2 Revise previously submitted LG

- At the LG detail page, you can revise and re-submit previously created LG. Simply modify the LG details, and then click 'Update' to save the changes.
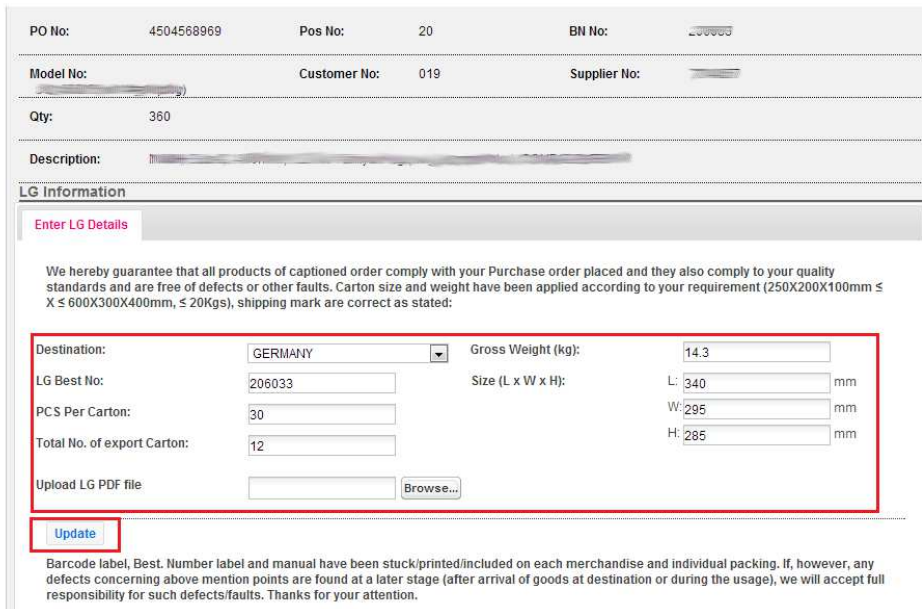
Fig 43: Revise previously submitted LG

5.2.3 Searching submitted LG

At the LG-Show Submitted section, you can search specific LG by two criteria: PO No. or Article no.

- To search LG by PO No., enter the target PO No. in the PO No. field, and click on "Search LG". The LG submitted entry for the specified PO No. will be displayed.

Fig 44: Search submitted LG by PO no.

- To search LG by Article No., enter the target Article No. in the Article No. field, and click on "Search LG". The LG entry submitted for the Article No. will be displayed.

Fig 45: Search submitted LG by Article No.

6. User Management

Since there can be more than one users operating the Supplier Portal at the same time, the system allows the master user to create multiple operator accounts. There is no limit on the maximum no. of user accounts allowed. This is visible to <u>master user only</u>.

7.1 Creating new user account

- To create new operator accounts, go to Site Management -> User Management from the top menu bar. Here you will find list of existing user accounts.

Fig 47: List of existing user accounts

- Click on the 'add new operator' icon. You will be taken to the new operator creation page. Enter the username and email address for the new user. Click 'Create'. The password information will be sent via email to the user directly.
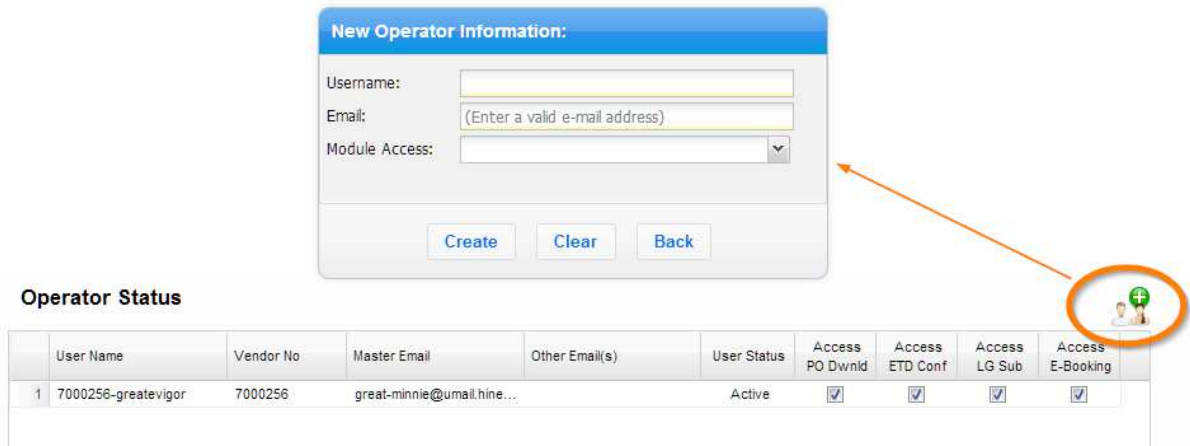
Fig 48: Create new user account

7.2 Updating new user account

To update details in an existing user account, click on the target user. You can modify the email and the user status of the user. Click 'Cancel' if you want to revert to the original info during mofidication.

- To update email address, enter the new email address and click 'Update'.

Fig 49: Update Email address of existing user

- To update status of the user account, choose from the User Status dropdown list, the click 'Update' to save the changes.

New: Newly created user account (not activated)

Active: Active user account
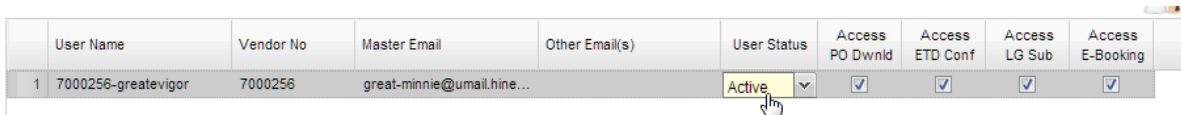
Disable: Disabled user account

Fig 50: Update User Status of existing user

7. Support

If you encounter any issues when using the Supplier Portal, you can contact the Supplier Portal support team via the online contact form. Go to Support -> Contact Technical Support from the top menu bar.

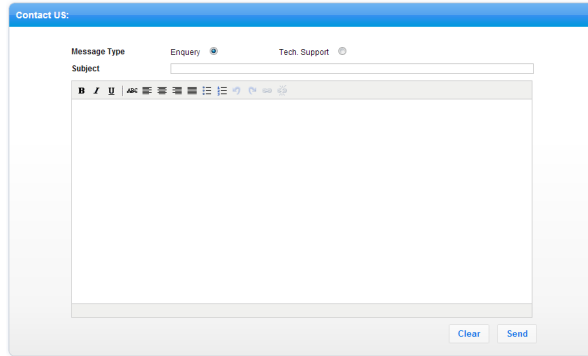You can enter your inquiry and click 'Send'. Our support team will get in touch with you as soon as possible.

Fig 51: Contact form

8. Help

In this section you can find supporting materials of the CEI Supplier Portal available for downloads (e.g. User Manual, Video Tutorial).

9. My Account

10.1 Logout

To log out of the Supplier Portal, go to My Account -> Account -> Logout from top menu bar. You will then be logged off from the system.

10.2 Change Password

- To change the password, go to My Account -> Account -> Change Password. Here you can reset your password by entering your old password and specifying a new password.
- If the entered information is correct, your new password will be saved upon clicking 'Submit'.
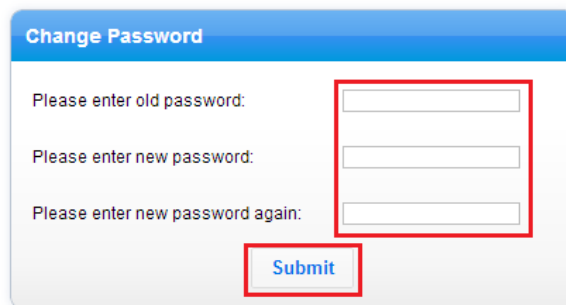

Fig 52: Changing password

Fig 53: Password successfully changed