SupplyPro

User Guide

07.23.08

Document Versions

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07.23.08	8.1.0 / 07.28.08	Monica Winkelman	Update chapters: Introduction, Orders.

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Contact Customer Care

Support for this product is available from the Customer Care Center and online.

Telephone	877-508-2547
After Hours Telephone	877-508-2547 or 972-728-8180
Hours	You can reach the Customer Care Center Monday through Friday, 7 a.m. to 7 p.m., Central Standard Time.
Email	support@hyphensolutions.com
Mail	Hyphen Solutions™, Ltd. 5055 Keller Springs Road, Suite 200 Addison, TX 75001
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Report Issues to Customer Care

The following items should be included when reporting issues to our Customer Care Center. Including these items will help expedite resolution. The Hyphen Solutions Customer Care Center can be reached at **1-877-508-2547** or by email at **support@hyphensolutions.com**.

Order Number	
SupplyPro User Name	
Builder Name	
Detailed Issue Description:	
Ticket # assigned by Customer Care:	

Use This Guide

This training guide contains information and step-by-step procedures for using this application. This document is written for beginning users and assumes no familiarity with the application's interface. This document is a training guide and is designed to be used with interactive training as given by a certified Hyphen Solutions consultant. Use this guide in conjunction with the training and the Help tool to answer your basic questions. For questions beyond the scope of this document, contact the Customer Care Center.

Give Feedback

We want to know what ***you*** think. If you have comments or suggestions for improving this guide, we would like to hear them. Please email documentation@hyphensolutions.com, with your feedback. Please do not email questions to this address. For questions about this or any Hyphen Solutions, Ltd. product, contact the Customer Care Center.

Document Terms

To train in a clear and concise manner, we will use the following terms in this guide and during your training.

Guide Term	Meaning
Construction Manager or Superintendent	The person responsible for managing the construction schedule, using BuildPro, to generate orders to SupplyPro.
E-destination	The e-mail address set up in SupplyPro to receive copies of order related information.
ERP System	ERP (Enterprise Resource Planning) System refers to a builder's back-office/accounting system. Ex. J.D. Edwards®, FAST® or NewStar®.
Integration, integrated user	When a company's ERP systems works automatically with BuildPro, that company is integrated with BuildPro.
Orders	Information generated by the builder to the supplier via SupplyPro that includes requested dates for the work, details of the work and, in most cases, planned pricing.
Supplier	Vendor, sub, sub-contractor, trade partner, or any other term used to refer to a company or person who supplies material or labor in the construction process.
Templates	Master job schedules that are used to create the production job schedules in BuildPro.

1 Introduction

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- How SupplyPro and BuildPro work together
- The Builder's responsibilities in using the system
- The Supplier's daily responsibilities to successfully utilize SupplyPro.
- How to set up the system for your company
- Accepting orders through various scenarios
- Completing orders, and maintaining the correct dates that tasks are completed.
- Basic builder-specific information
- Some of the reporting capabilities of the system

About SupplyPro

SupplyPro, in conjunction with Hyphen Solutions, Ltd.'s Build products, gives building industry suppliers and subcontractors the power to manage orders and communications with builders instantly, via the Internet. BuildPro is seamlessly integrated with SupplyPro, providing material lists and supplier information directly from the SupplyPro database.

SupplyPro allows suppliers to eliminate much of the paperwork associated with managing orders, including the entry, coding and selection errors that accompany the process, by receiving purchase orders and sending invoices electronically. Firms using SupplyPro can monitor every construction project assigned to them, with real time updates. SupplyPro companies find they speed up their receivables by being able to track shipments and confirm deliveries electronically when they happen. If there is a problem, users know about it instantly, not 30 days later when the check doesn't arrive. Plus, by seeing the construction project schedule from the day the project is started, SupplyPro provides accurate inventory projections that detail when products and services will be required.

With SupplyPro, you have immediate access to all orders placed by your builders. You can use SupplyPro to manage Received, Rescheduled and To Do orders, making communications with builders quick, easy, and more accurate. Forecasting reports predict future potential builder orders, and order history report tracks order and item trends over time.

Benefits of SupplyPro

The following are some of the key benefits of using SupplyPro:

- Manages all of your customers and orders and frees sales staff from non-sales activities.
- Reduces the amount of paperwork and the number of phone calls required to log orders by providing total electronic collaboration between builders and suppliers.
- Helps eliminate data entry errors and streamlines the order procedure.
- Saves time required to manage orders.
- Allows you to operate your business 24/7, with an Internet-based solution that offers access to your order pipeline - all day, every day.
- Provides material and labor forecasts.
- Provides access to up-to-date job schedules from BuildPro so that you can monitor and confirm your scheduled deliveries or job start dates, avoiding dry runs or false starts.

Features of SupplyPro

SupplyPro offers many features that help to improve communication, scheduling and order management efficiency and report capabilities:

- **System Integration** - Connects builders to suppliers and dealers through the BuildPro/SupplyPro relationship.
- **Intelligent Solutions** - Valuable data, including the builder's construction schedules and future needs is easily accessible.

- **Order Management** - Review and act upon Received, Rescheduled, To Do, Complete, and Alert orders. Email and/or fax notifications in addition to real-time order management workflow.
- **Reports and Forecasting** - Keep track of your past business using order history reports or take a look into the future with forecasting reports and potential order reports. View customers' up-to-date job schedules.

Collaboration

SupplyPro provides the supplier the ability to collaborate with the builder:

- SupplyPro and BuildPro provide reliable daily access to real-time schedule management information.
- Builders use BuildPro and Suppliers use SupplyPro. We will mainly focus on SupplyPro in this class; however, we will be discussing some aspects of BuildPro at a high level.
- The two systems increase productivity and improve communication between the supplier and builder.
- The systems collaboratively work together to manage scheduling, by allowing the electronic transfer of Purchase Orders, PO Acceptance, changes, receipts, and notes between the builder and supplier.

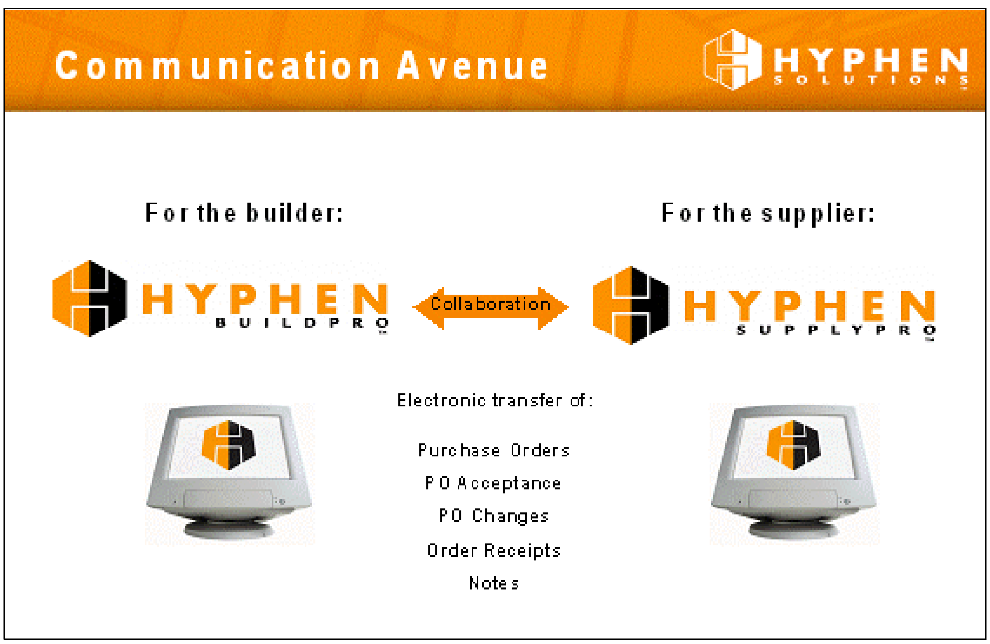


FIGURE 1. SupplyPro communicates with BuildPro

System Requirements

Please review the following system requirements before you begin using SupplyPro. Minimum system requirements to use SupplyPro are:

- A computer with access to the Internet (high-speed access is highly recommended)
- Microsoft Internet Explorer (IE) 6.0 or higher

Login to SupplyPro

To access SupplyPro from the Internet:

1. Open **Internet Explorer**.
2. In the address bar of Internet Explorer, type: **www.hyphensolutions.com**
3. Press the **Enter** key. The Hyphen Solutions website opens.
4. In the bottom right of the page, click the **SUPPLYPRO USERS: CLICK HERE TO LOGIN** link. The SupplyPro Login page opens.

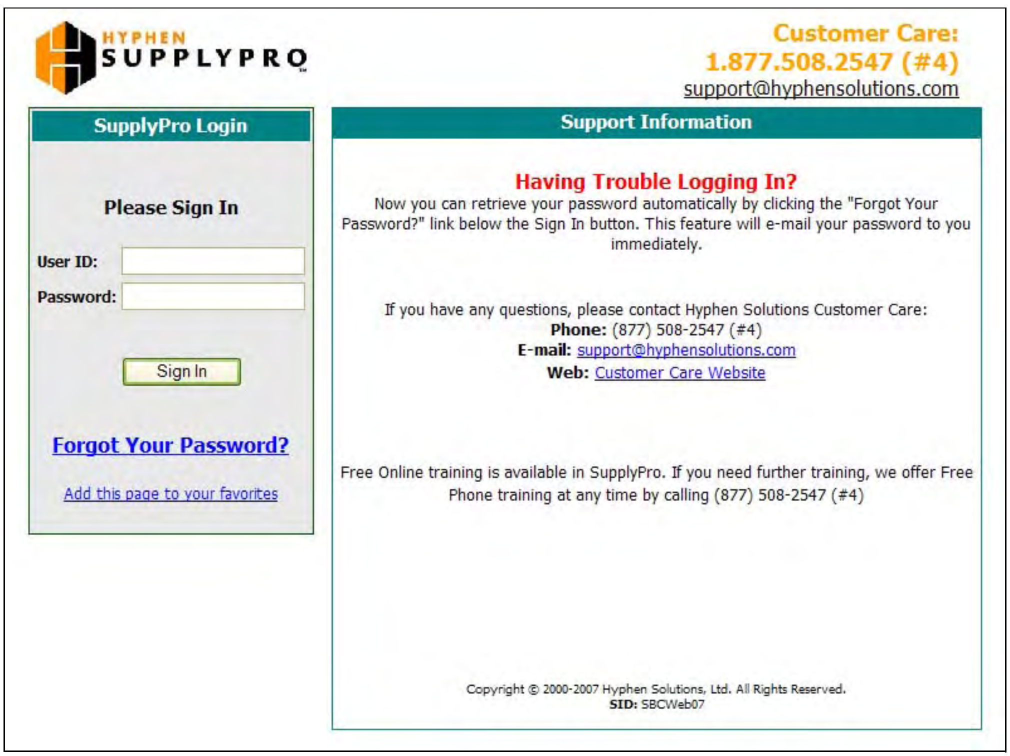


FIGURE 2. SupplyPro Login page

5. In the **User ID** field, type your **User ID**.
6. In the **Password** field, type your **Password**.
7. Click **Sign In** to login to SupplyPro.

Retrieve Password

This functionality allows users who have forgotten their password to retrieve it via email. On the Login page, users can click the "Forgot Your Password" link to open the Request Password page. Users enter their User ID and Email Address. The email address must match the email address on the User Detail page (Manager tab) in SupplyPro. If the Email Address matches the User ID entered, the user's password will be emailed to the user's email address.

To retrieve your password:

1. On the SupplyPro Login page, click the **Forgot Your Password?** link on the left side of the page. The Password Request page opens.

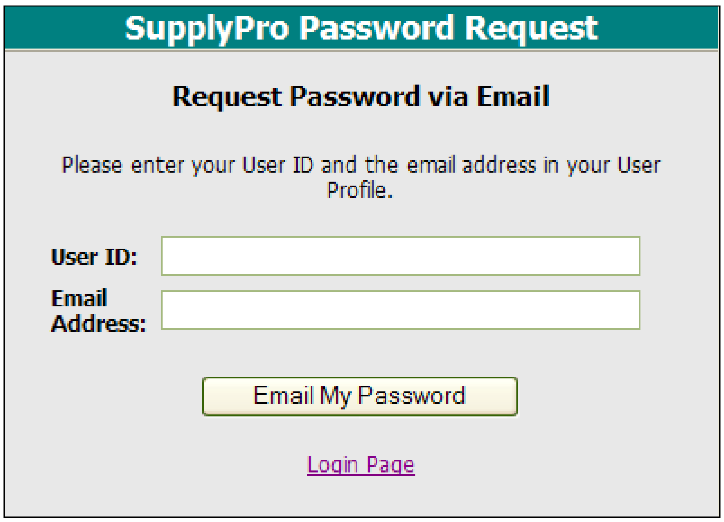


FIGURE 3. Password Request page

2. Enter your **User ID**.

3. Enter your **Email Address**.
Note: This email address must match the email address on the User Detail page (Manager tab) in SupplyPro.

FIGURE 4. Password Request page

4. Click the **Email My Password** button. Your password is emailed to your email address.

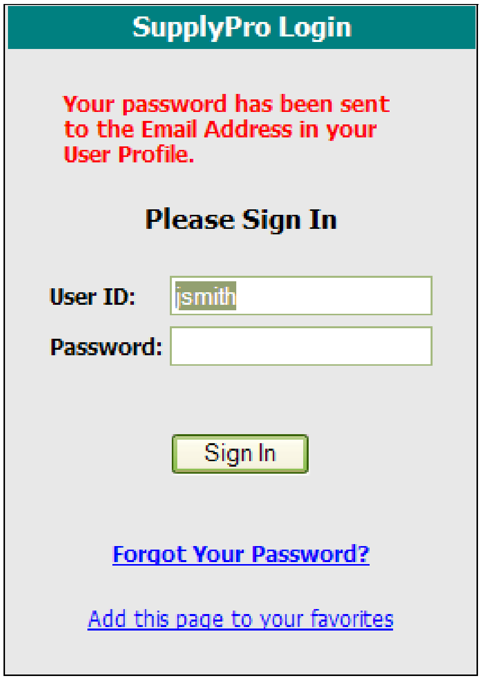


FIGURE 5. SupplyPro Login page - password emailed to user's email address

Force Sign In

If you attempt to log in to SupplyPro with the same User ID someone else has used to log in, or you forgot to log out of the system previously, the login page will be displayed again, with the Force Sign In notification.

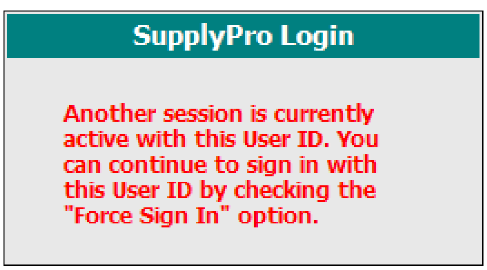


FIGURE 6. SupplyPro Login page - force sign in

To force a sign in:

1. In the **Password** field, type your **Password** again.
2. Click the **Force Sign In** check box.

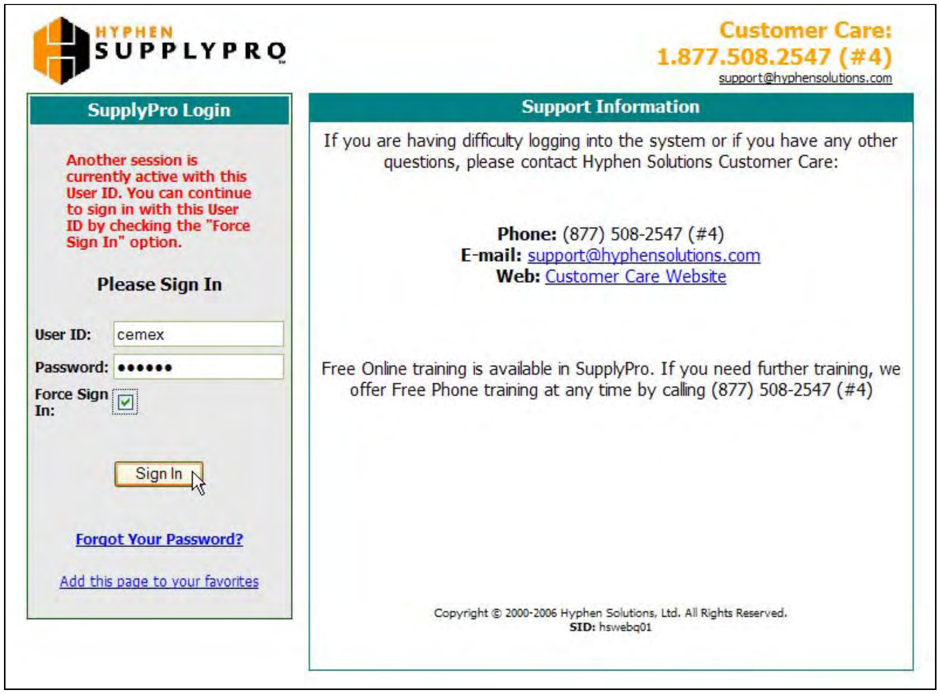


FIGURE 7. SupplyPro Login page - force sign in

3. Click **Sign In** again. The SupplyPro Home page opens.

SupplyPro Tabs

SupplyPro's features are organized into four tabs. To move from one tab to another, click on the appropriate tab. You may not see all of these tabs, depending on your security role.

- **Home** - The Home tab shows a quick glance at today's current activities. It also provides links to SupplyPro enhancements and update documentation, as well as the Training Videos.
- **Orders** - The Orders tab provides you with tools for managing builder orders and jobs. This is where orders are accepted and completed, and alerts are worked and cleared.
- **Reports** - The Reports tab allows you to generate reports to help you keep on top of current order activity, order history, job status, scheduling, and forecasting.
- **Manager** - The Manager tab is where you manage system users, security roles and builder accounts.

Navigation Tips

You can use the following techniques to navigate any SupplyPro application page:

- In addition to links on the main tab pages, the Left Navigation also lists all features available from the current tab.
- To access a specific feature, you can click either the links on the main tab page or the links on the Left Navigation Bar.

- To open SupplyPro Help, click the Help link in the upper right-hand corner of any page for information about that page of SupplyPro. The Customer Care contact information is at the bottom of every page.
- To move from field to field when adding information, use the TAB key.
  Note: If you press the Enter key on a form, SupplyPro assumes you have finished. It will tell you about the required fields you neglected to complete. Required fields are identified by a red arrow.
- To sign out of SupplyPro, click the Sign Out link at the bottom of any page.

SupplyPro Account Messages

When a user logs into SupplyPro, the user may see one of several account messages. The message informs the user that their credit card will expire in 15 days or less or if the account is 35 days or more overdue.

The user may receive one message or a combination of messages if the user has a credit card message and account overdue message at the same time:

- Your credit card will expire in 15 days.
- Your credit card has expired.
- Your account is 35 days overdue.
- Your account was inactivated because your account was more than 60 days overdue.
- Your account was inactivated because you cancelled your contract.

Credit card will expire in 15 days

Message continues until the expiration date. On the expiration date, user receives the message "Your credit card has expired."

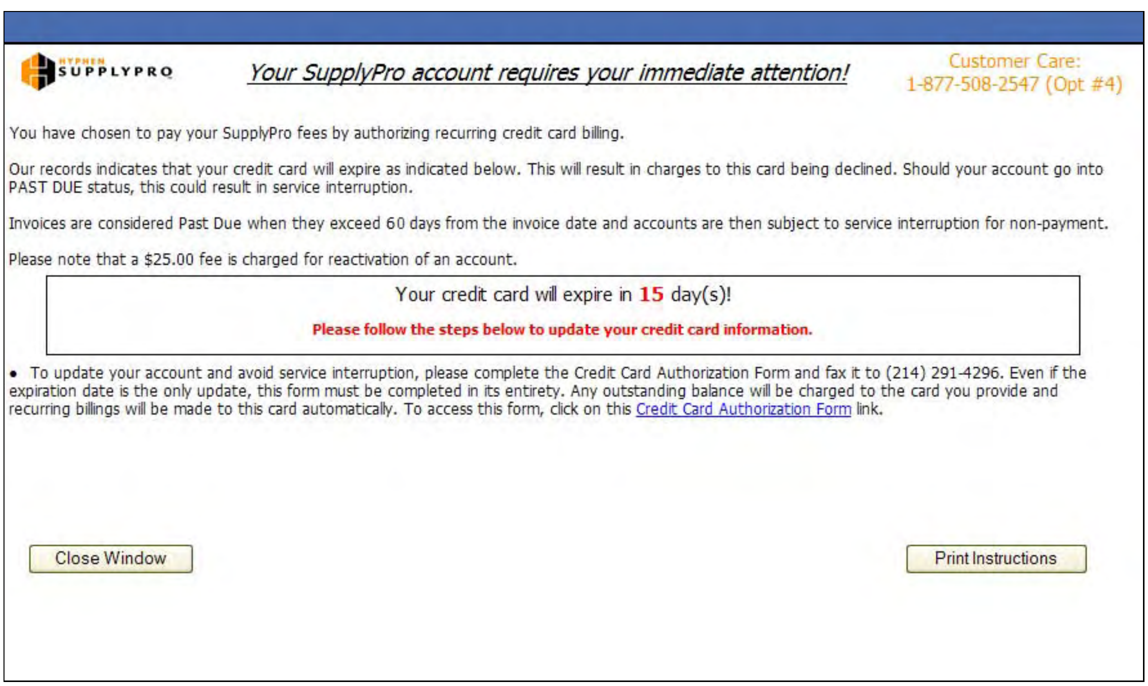


FIGURE 8. Credit card will expire in 15 days

Credit card has expired

Message appears on the card expiration date.

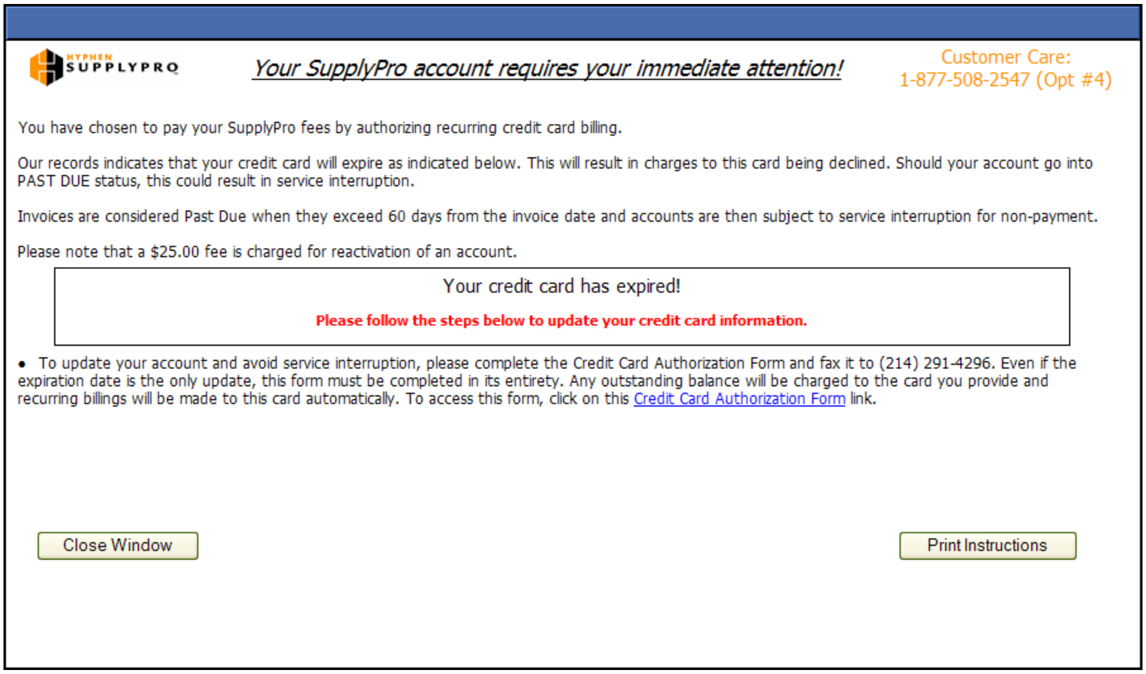


FIGURE 9. Credit card expired

Account is 35 days overdue

Message starts at 35 days overdue continues through 60 days overdue. On the 61st day overdue, the account is inactivated, and user must contact the Accounting Department to settle the account.

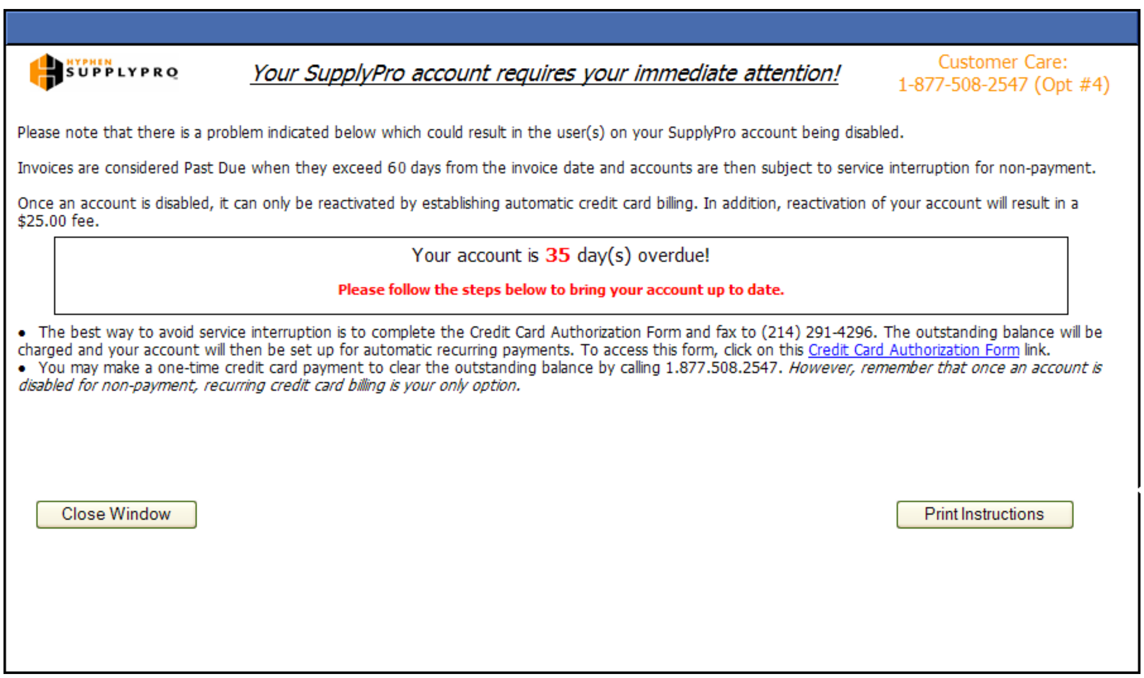


FIGURE 10. Account is 35 days overdue

Account inactivated because it is more than 60 days overdue

Message appears on the login screen starting when the account is 61 days overdue. The user must contact the Accounting Department to settle the account.

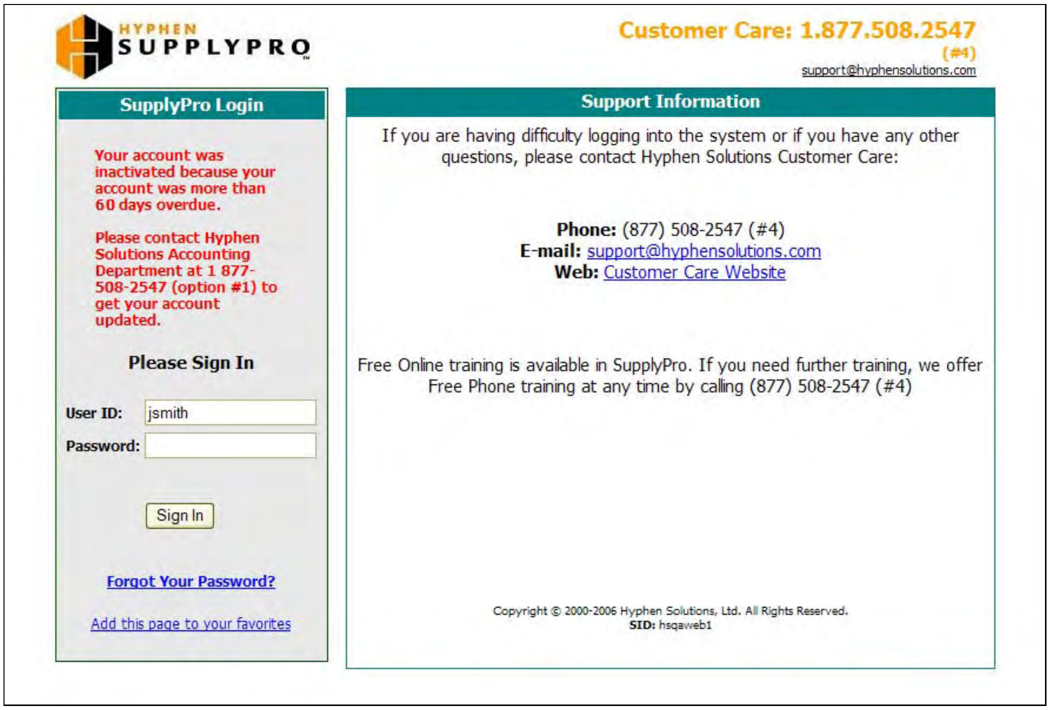


FIGURE 11. Account inactivated because it is more than 60 days overdue

Combined message:

Your credit card will expire/has expired

AND

Your account is X days overdue

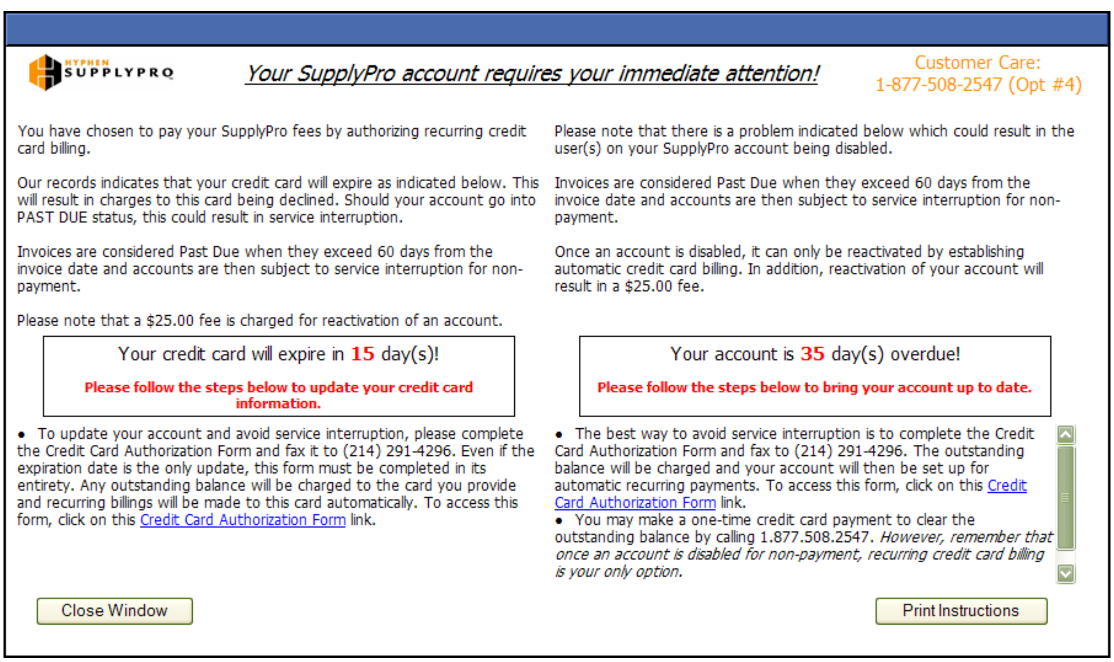


FIGURE 12. Combined message

Account inactivated because supplier cancelled contract

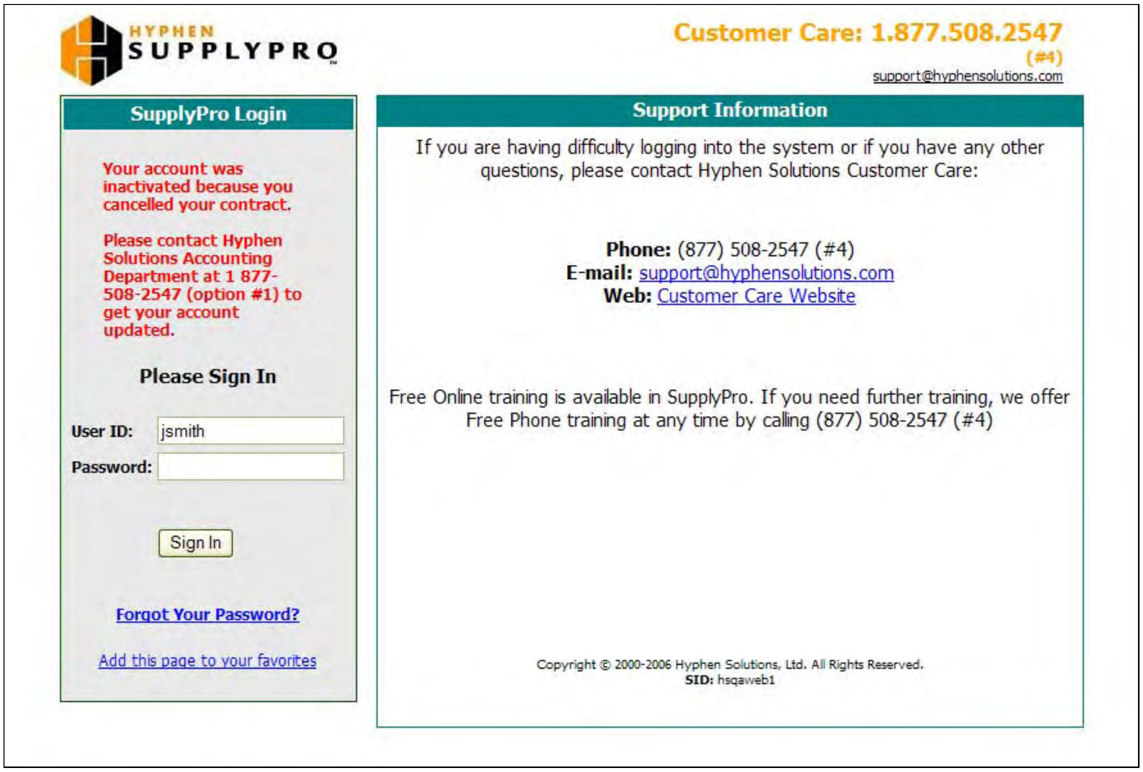


FIGURE 13. Account inactivated because supplier cancelled contract

2 Home Tab

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- The different sections of the Home Tab
- How to quickly access order and alert information
- How to use the Left Navigation Bar
- How to access the Online Tutorials, or Videos

Overview

The Home tab is the first page you see each time you log in to SupplyPro. This page gives you a quick glance at today's activities. The Home page is divided into the following sections:

- Quick Search
- Training Videos
- Online Documentation
- Builder Documentation
- Current Activity
- Alerts
- 7-Day Forecast

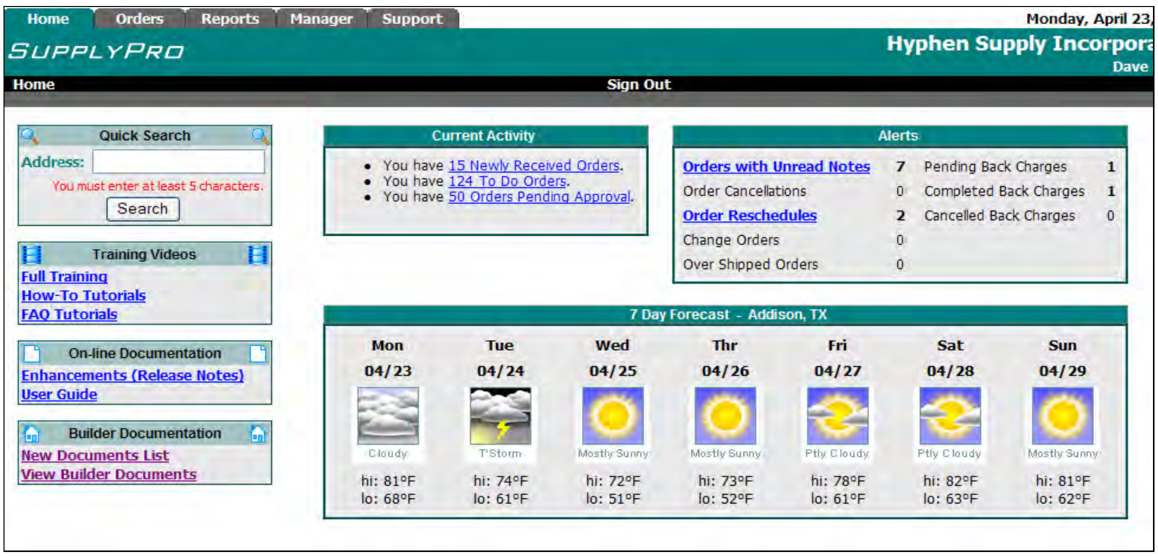


FIGURE 1. Home page

Quick Search

Perform a quick search for a specific job or order. Enter at least 5 letters or numbers of a job address, and click the Search button. The Order Search page opens, listing the job or jobs that match you search.

Training Videos

Links to the SupplyPro training videos on the Hyphen Solutions website:

- Full Training
- How-To Tutorials
- FAQ Tutorials

Online Documentation

Links to the SupplyPro PDF documentation on the Hyphen Solutions website:

- Enhancements (Release Notes)
- User Guide

Builder Documentation

- **New Documents List** - View newly added documents for each builder in a selected time period. (More information in the chapter "View & Upload Job Documents.")
- **View Builder Documents** - View documents or hyperlinks uploaded by BuildPro or SupplyPro users. View the document history, as well as edit, update, or delete your SupplyPro documents. (More information in the chapter "View & Upload Job Documents.")

Current Activity

The Current Activity section provides links to the following types of orders.

- Newly Received Orders submitted from builders
- To Do Orders pending shipment/completion
- Pending Approval Orders awaiting completion by the builder

Alerts

The Alerts section provides an overview and a link to the different types of alerts that are currently present in the system. This should be one of the first areas worked every day in SupplyPro. Refer to the chapter called "Alerts" for more information.

7-Day Forecast

The 7-Day Forecast section displays the predicted conditions and high and low temperatures for the next week.

Other Links

- **Help** - The Help pages contain information related to whatever tab you happen to be in. When you click on "Help," a separate window will open. You can search by keyword, or by clicking on the link to a subsection. You can also print the help pages by clicking the "Print Me" button. At the bottom of every help page, you can find the phone number and email address for Customer Care.
- **Sign Out** - Click this link to log out of SupplyPro. You can also click the Sign Out link at the bottom of every SupplyPro page.

Online Videos

Hyphen Solutions provides many options for learning how to use SupplyPro. We offer onsite classes, over-the-phone training, as well as one of the most convenient and efficient ways to get trained, which is the Online Videos.

There are different videos to meet different training needs. You should have watched the Pre-Training videos prior to class. These videos cover in detail those areas of SupplyPro that will only be highlighted as a high level overview during the onsite or over-the-phone training sessions.

We also offer the full training in video form. This covers the same information as the over-the-phone or onsite classes, but can be watched whenever you wish, at your convenience. This video is a great tool to use when you hire a new person, or have additional people to train who were unable to attend a class, and don't have the time to attend a phone training. This video takes approximately 1 hour and 15 minutes to watch.

For individual questions, we offer "Frequently Asked Question" (FAQ) videos. These videos are 1-2 minutes in length and cover the most commonly asked questions we get at Customer Care regarding the most important aspects of SupplyPro.

Access these videos by clicking on one of the links in the Training Videos box on the Home page of SupplyPro. The SupplyPro Training Center on the Hyphen Solutions website opens.

FIGURE 2. SupplyPro Training Center on Hyphen Solutions website

3 Manage Alerts

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- Viewing Order Alerts
- Clearing Order Alerts

Overview

Alerts are orders that have been tagged with messages from the builder regarding general notes, cancellations, reschedules, changes, over shipped orders, and new documents. A notification in red appears beneath the order to indicate that there is an alert attached to it.

On each Alerts page, you can clear the one or all of the alerts by clicking the check box to the right of each order. Click the action button at the bottom of the page to accept the alert items and clear those alerts.

Note: Hyphen Solutions, Ltd. suggests that Alerts be the first area of the system that you check when you log in each day.

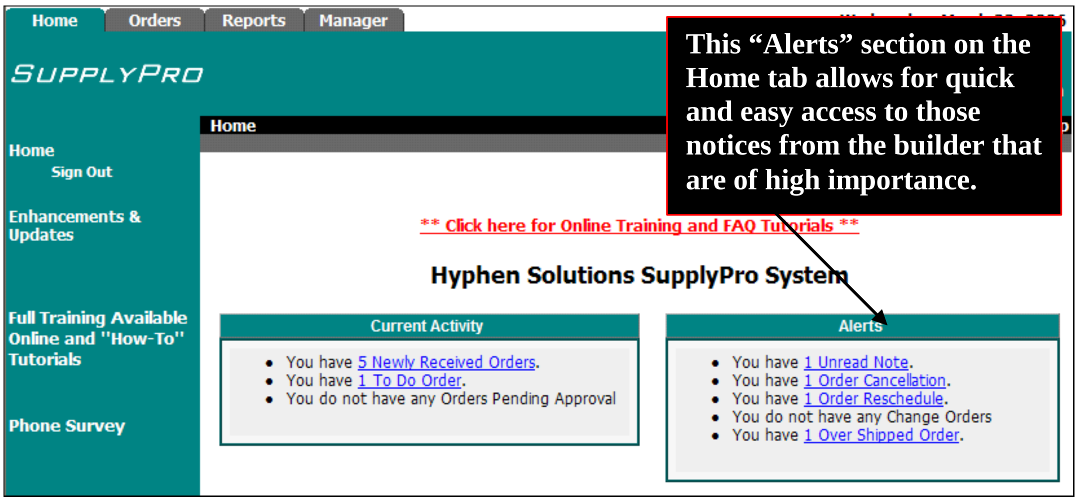


FIGURE 1. Alerts box on the Home page

View Alerts

There are four ways to view your alerts:

- In the Alerts box on the Home page, click the hyperlink to a particular type of alert.
- On the Orders Tab, click on the hyperlinks in the alerts count box.
- Click Alerts on the Navigation bar and you will get a list of all alerts on the main page.
- On the Left Navigation Bar, under Alerts, click the type of alert you want to see.

Orders with Unread Notes

Unread Note alerts are messages from the builder to the supplier regarding something about the order that would be important for the supplier to know. When you receive a note, you will receive an Unread Note alert. The note is a permanent part of the order; however, the alert regarding the note should be cleared.

To view and clear an Unread Note alert:

1. On the Orders tab, click the **Unread Notes** link under Alerts on the Left Nav Bar. The Unread Notes page opens.
2. After reading the unread notes, click the check box to the right of the note to select it.

3. Click the **Mark Selected Notes as Read** button to clear the alert.

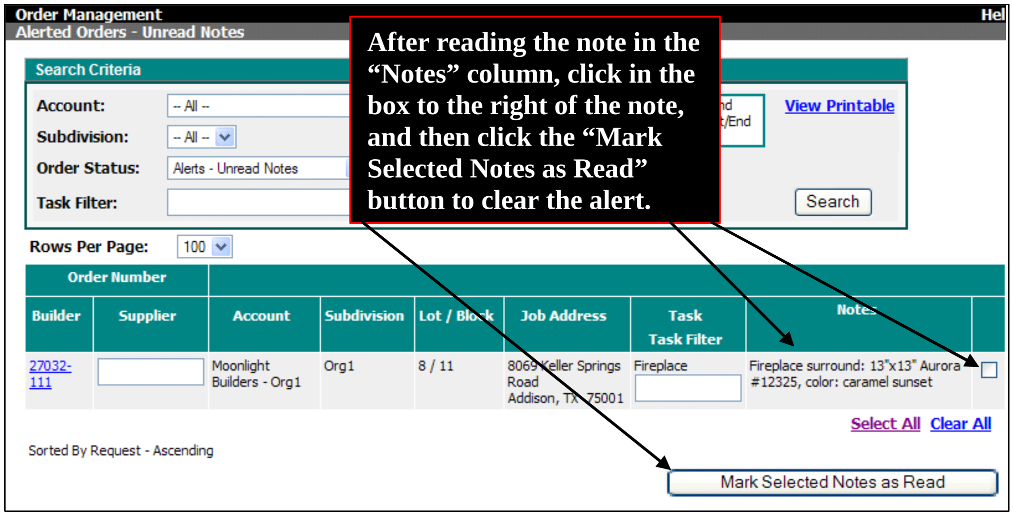


FIGURE 2. Unread Notes page

To respond to notes from the Order Detail page:

1. On the Unread Notes page, click the **Order Number** link. The Order Detail page opens.
2. Click the **Notes** tab.
3. Read the note and type your response in the **Note to Builder** field. Click the **Send Note** button to send the note to the builder.
4. Click the **Mark Notes as Read** button to clear the builder alert.

Order Cancellations

Cancellation alerts let you know that the builder is canceling a task or the entire job.

To view and clear a Cancellation alert:

1. On the Orders tab, click the **Cancellations** link under Alerts on the Left Nav Bar. The Cancellations page opens.
2. Click the check box next to cancellation alert you want to clear. Click the Clear Selected Alerts button to clear those alerts.
3. To repond to the cancellation, click the **Order Number** link. The Order Detail page opens.

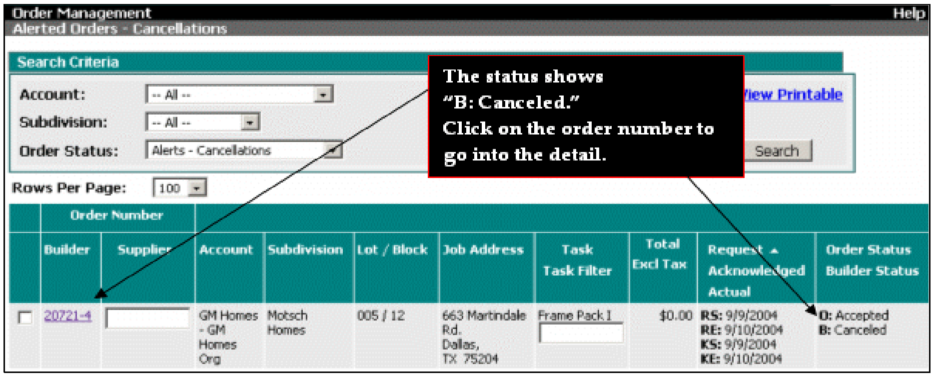


FIGURE 3. Cancellations page

4. Click the **Change Requests** tab. The alert and status is displayed.

5. Click the **Respond** button next to the alert you want to view. The Change Request Detail page opens.

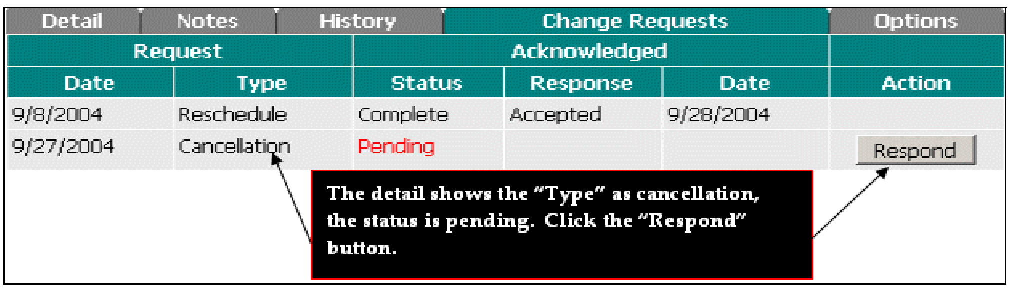


FIGURE 4. Order Detail page - Change Requests tab

6. Type a **Note to Builder**, if necessary.

7. Click the **Accept Change** button. The order status changes to canceled.
Note: If you do not want to accept the change, contact the builder by phone or email.

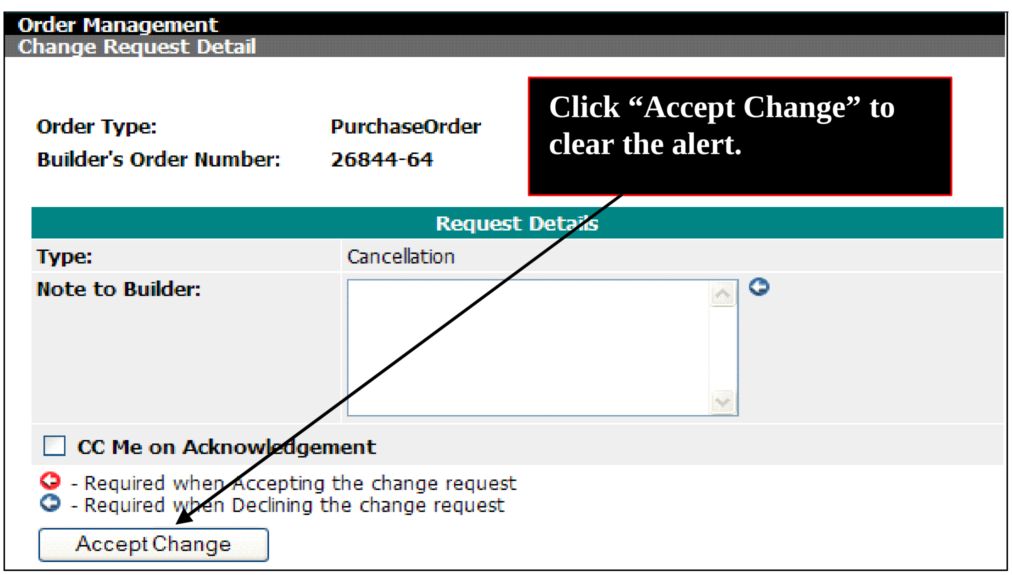


FIGURE 5. Change Request Detail page

To view canceled orders:

1. On the Orders tab, click on the **Received** link on the Left Nav Bar. The Received Orders page opens.
2. In the **Order Status** drop-down list, choose **Canceled**. The Canceled Orders page opens, showing the order you just canceled.

Order Reschedules

Reschedule alerts let you know that there has been a change in the dates that the builder wants you to be onsite to start and complete the task. You must work this using the process below or you will not be made aware when the schedule has changed. If you neglect to work reschedules, you will not know what day the builder wants you onsite.

To respond to a Reschedule alert:

1. On the Orders tab, click the **Reschedules** link under Alerts on the Left Nav Bar. The Reschedules page opens.

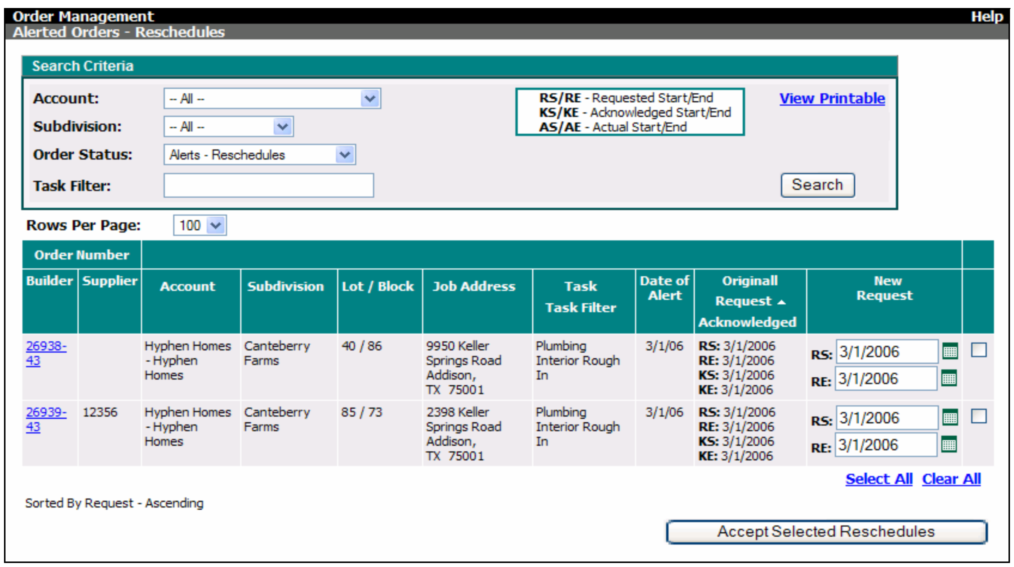


FIGURE 6. Alerted Orders - Reschdules page

2. Check the builder's proposed reschedule start (**RS**) and (**RE**) end dates for each order.
3. Enter new **RS** and **RE** for each order that contains unacceptable reschedule dates.
   Note: Click the calendar icon to open a date picker.
4. Click the check box next to each order reschedule you want to accept.
   Note: This includes order reschedules in which you changed the RS and RE dates.
5. Click the **Accept Selected Reschedules** button at the bottom of the page.
   Note: This clears the selected alerts and sends a notification to each builder that you either accept the reschedule dates or that you are suggesting new reschedule dates.

To clear the reschedule alert from the Order Detail:

1. Click the **Order Number** link. The Order Detail page opens.
2. Click the **Change Requests** tab.

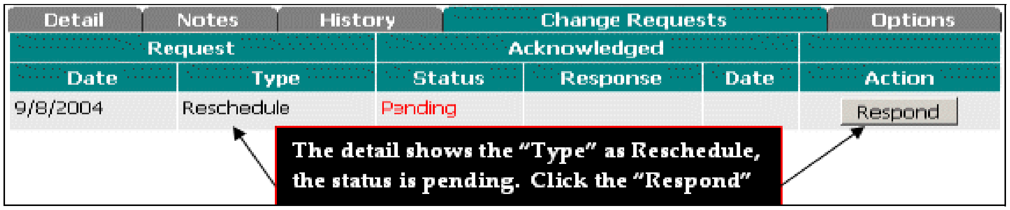


FIGURE 7. Order Detail page - Change Requests tab

3. Click the **Respond** button.
4. If you accept the **New Start/End Dates**, click the **Accept Change** button. This clears the alert and sends a notice to the builder that you have accepted the dates.
   Note: If you do not want to accept the change, contact the builder by phone or email.
5. Or, request a different date by entering different **Start/End Date**.
6. Enter a note in the **Note to Builder** box, and click the **Accept Change** button. This clears the alert and lets the builder know you requested alternate dates.

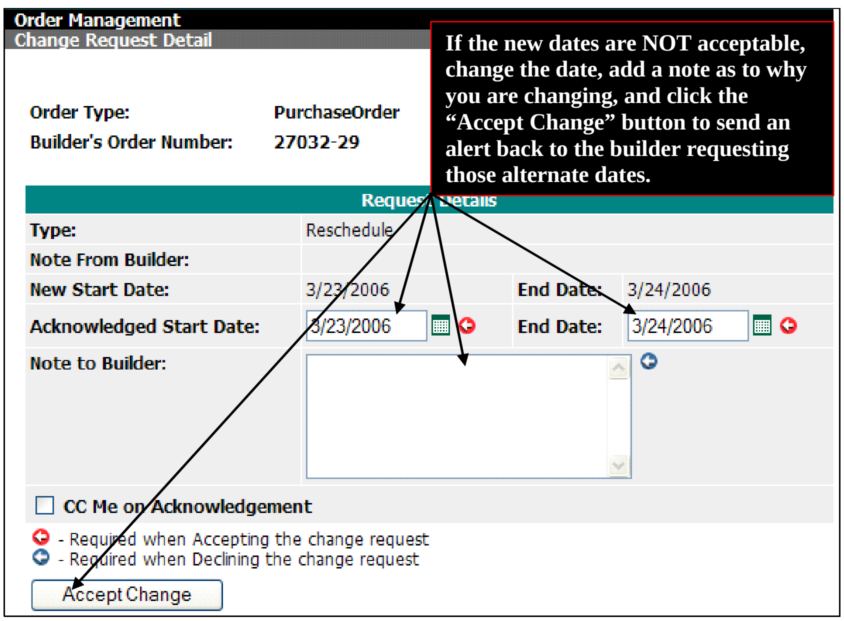


FIGURE 8. Change Request Detail page - request alternate dates

Change Orders

Change Order alerts occur when the builder needs to change the line item detail of an order or the price of an order. You may receive a change order alert on an order in any status.

To view and clear a Change Order alert:

1. On the Orders tab, click the **Change Orders** link under Alerts on the Left Nav Bar. The Change Orders page opens.
2. Click the **Order Number** link. The Order Detail page opens.
3. Click the **Change Requests** tab.

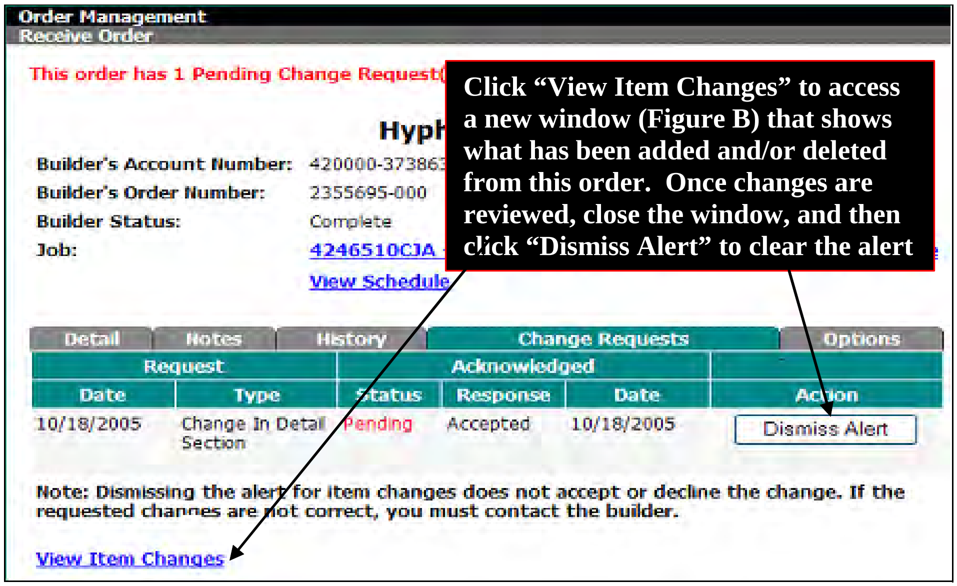


FIGURE 9. Order Detail page - Change Requests tab

4. Click the **View Item Changes** link at the bottom of the page. A new window pops up displaying the changes.

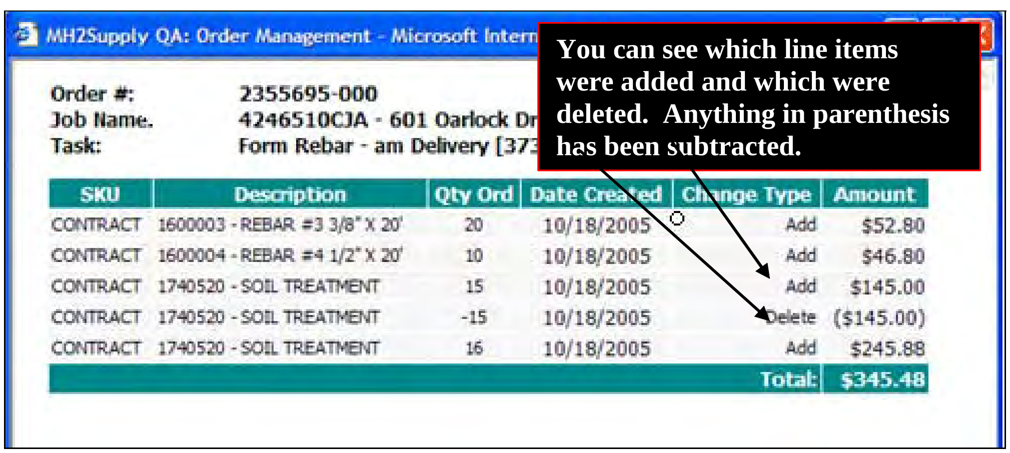


FIGURE 10. View Item Changes pop-up window

5. Review the changes, and then close the window.
6. Click the **Dismiss Alert** button to clear the alert.
   Note: Dismissing the alert simply clears the alert from SupplyPro. If you dispute the changes, or they are not correct, you must contact the Builder directly.

Over Shipped Orders

Over Shipped Order alert notifies the supplier that the builder received more materials or products than they ordered. Only suppliers who ship out materials will get Over Shipped Alerts.

To view and clear an Over Shipped Order alert:

1. On the Orders tab, click the **Change Orders** link under Alerts on the Left Nav Bar. The Change Orders page opens.
2. Click the **View Details** link next to each order to view details for the over shipped order. The Over Shipped Orders pop-up window opens.

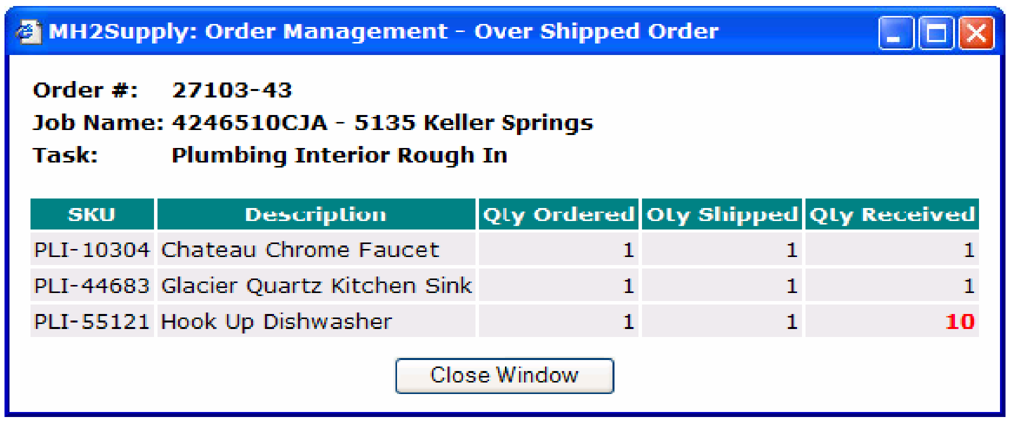


FIGURE 11. Over Shipped Order pop-up window

3. To clear the alert from the Order Detail page, click the **Order Number** link. The Order Detail page opens.
4. Scroll to the bottom of the page to view the over shipped items under the **Detail** section. Click the **Clear Over Shipped Alert** button to clear the alert.

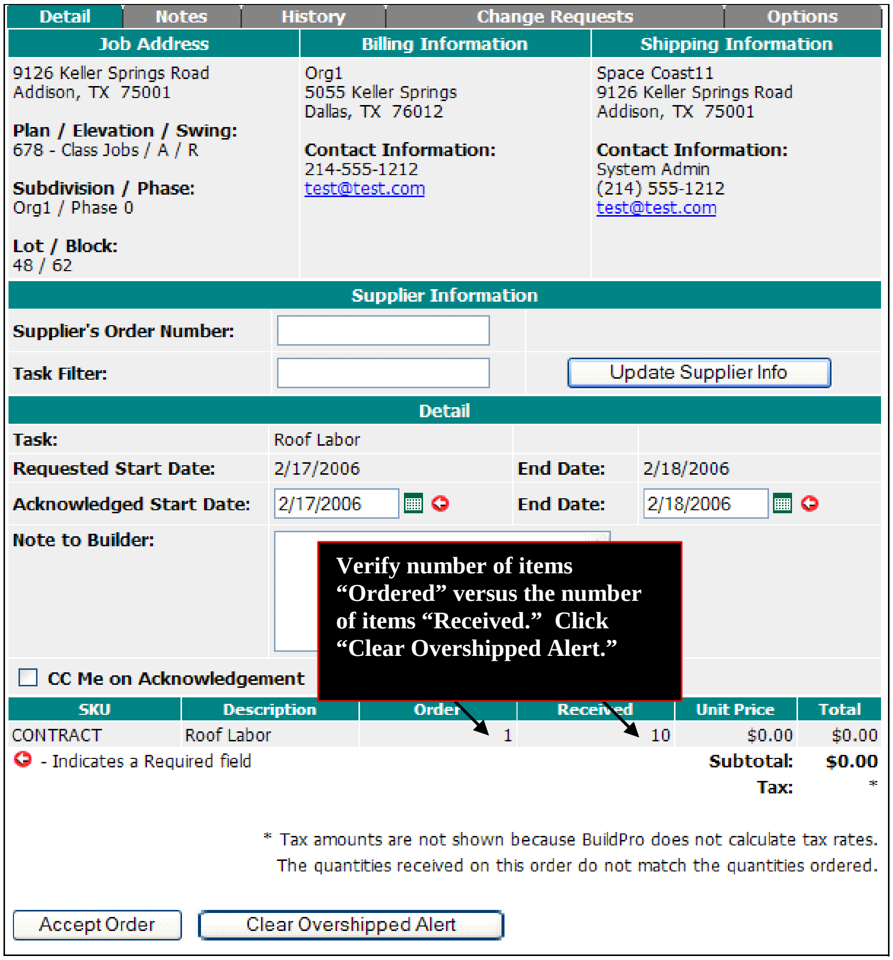


FIGURE 12. Order Detail page - over shipped items

Pending Back Charges

This page displays the list of potential back charges submitted by the builder. A Pending Back Charge alert is generated in SupplyPro when the builder creates a new back charge in BuildPro. This alert notifies the supplier that a potential back charge may soon be charged to the supplier. A back charge remains in pending status until the back charge is approved by the builder's back office.

To view and clear a Pending Back Charge alert:

1. Click on the **Orders** tab. The Order Management page opens.
2. In the **Alerts** box, click on the **Pending Back Charges** link. The Alerted Orders - Pending Back Charges page opens.

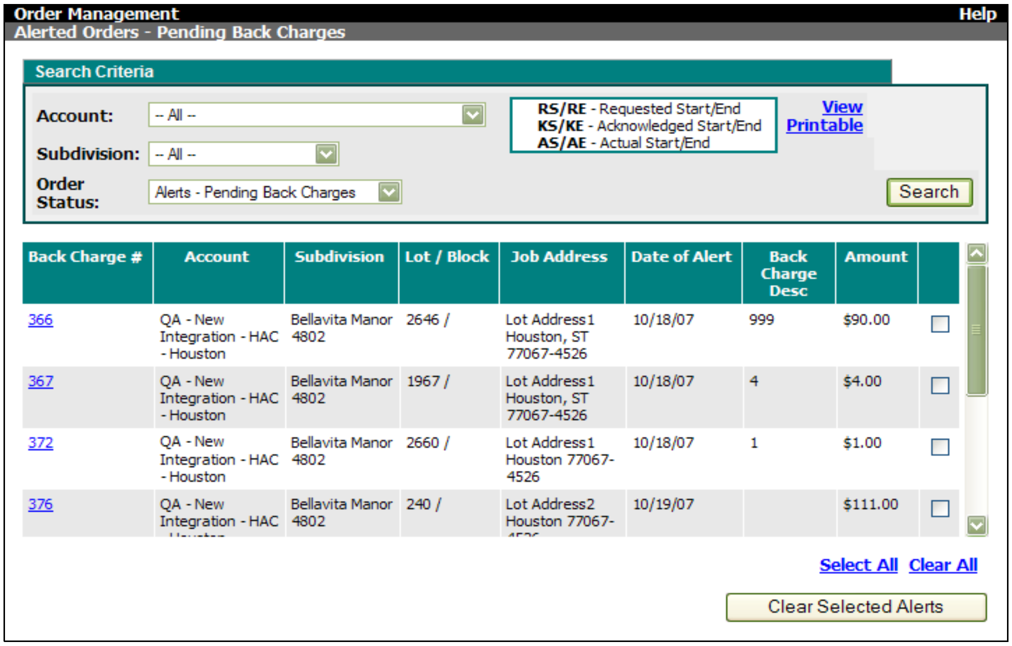


FIGURE 13. Alerted Orders - Pending Back Charges page

3. Click on a **Back Charge** # link to open the Back Charge Detail page.
Note: This page allows the user to view detail information for the back charge, similar to the information on the Order Detail page. Click on the Job link to open the Job Summary page.

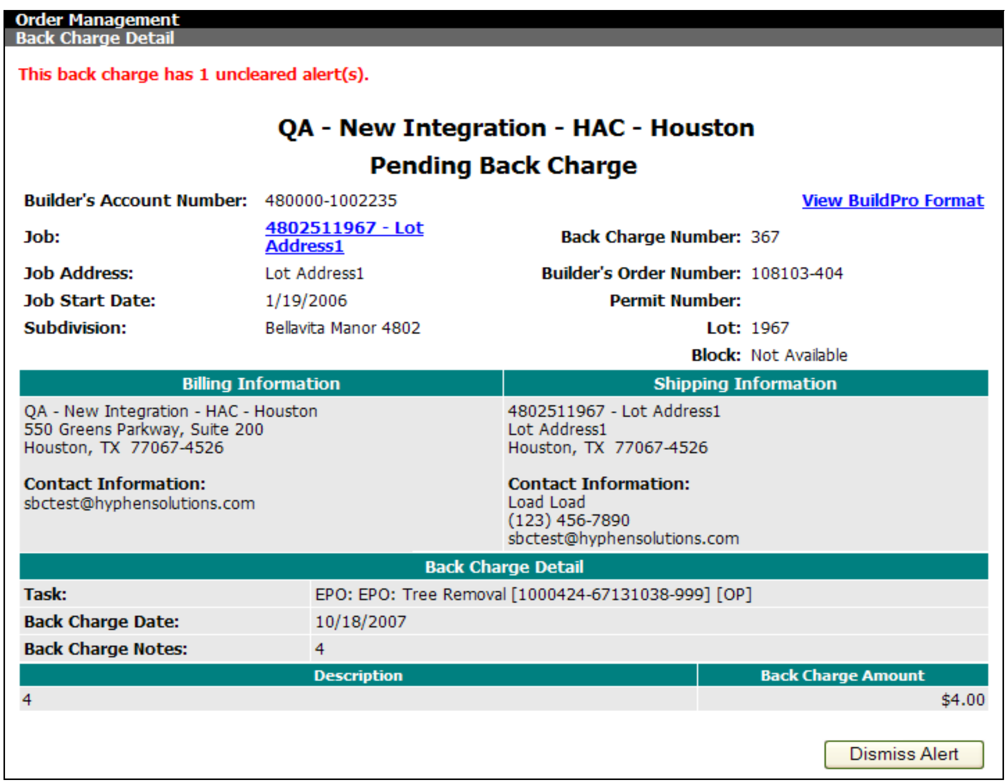


FIGURE 14. Back Charge Detail page

4. Go back to the **Alerted Orders - Pending Back Charges** page.
5. Click the check box to the right of each pending back charge alert you want to clear.
6. Click the **Clear Selected Alerts** button at the bottom of the page. The alert is cleared from the page. If the builder's back office approves the back charge, a Completed Back Charge alert will be generated, indicating that you are being back charged by the builder.
7. View cleared back charges on the **Back Charges** report. Search for back charges by status or the unique back charge number.

Completed Back Charges

This page displays the list of completed back charges submitted by the builder. A Completed Back Charge alert is generated in SupplyPro when the back charge status changes to complete. This means that the back charge has been approved by the builder's back office, and the back charge will be charged to the supplier.

To view and clear a Completed Back Charge alert:

1. Click on the **Orders** tab. The Order Management page opens.
2. In the **Alerts** box, click on the **Completed Back Charges** link. The Alerted Orders - Completed Back Charges page opens.

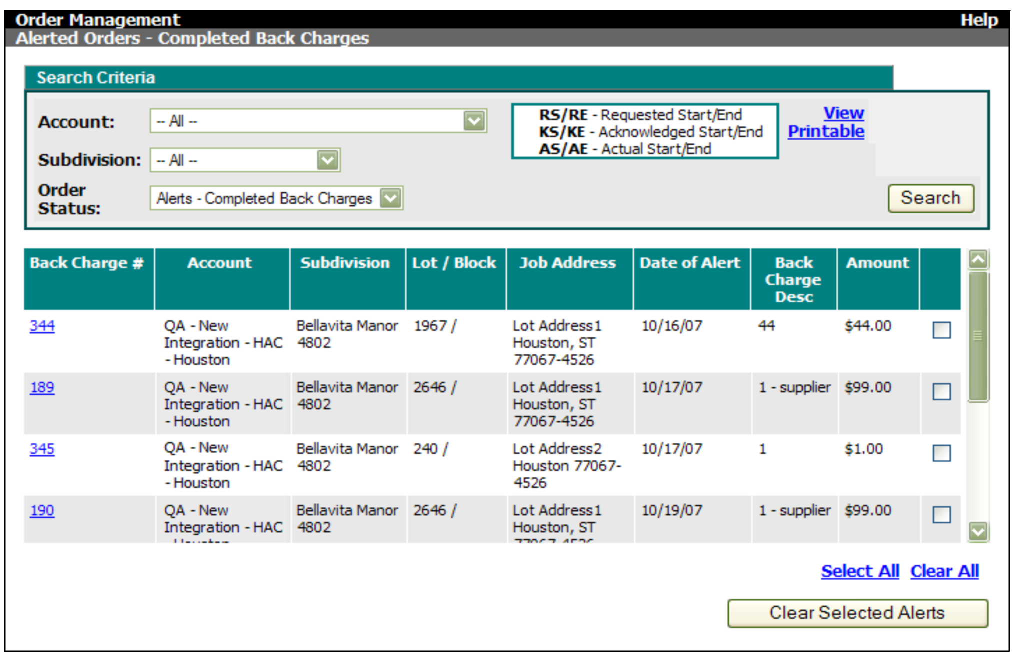


FIGURE 15. Alerted Orders - Completed Back Charges page

3. Click on a **Back Charge #** link to open the Back Charge Detail page.
   Note: This page allows the user to view detail information for the back charge, similar to the information on the Order Detail page. Click on the Job link to open the Job Summary page.
4. Go back to the **Alerted Orders - Completed Back Charges** page.

5. Click the check box to the right of each completed back charge alert you want to clear.
6. Click the **Clear Selected Alerts** button at the bottom of the page. The alert is cleared from the page.
7. View cleared back charges on the **Back Charges** report. Search for back charges by status or the unique back charge number.

Cancelled Back Charges

This page displays the list of cancelled back charges submitted by the builder. A Cancelled Back Charge alert is generated in SupplyPro when the back charge status changes to cancelled. This means that the back charge has been deleted by the construction manager or by the builder's back office. The back charge will not be charged to the supplier.

To view and clear a Cancelled Back Charge alert:

1. Click on the **Orders** tab. The Order Management page opens.
2. In the **Alerts** box, click on the **Cancelled Back Charges** link. The Alerted Orders - Cancelled Back Charges page opens.

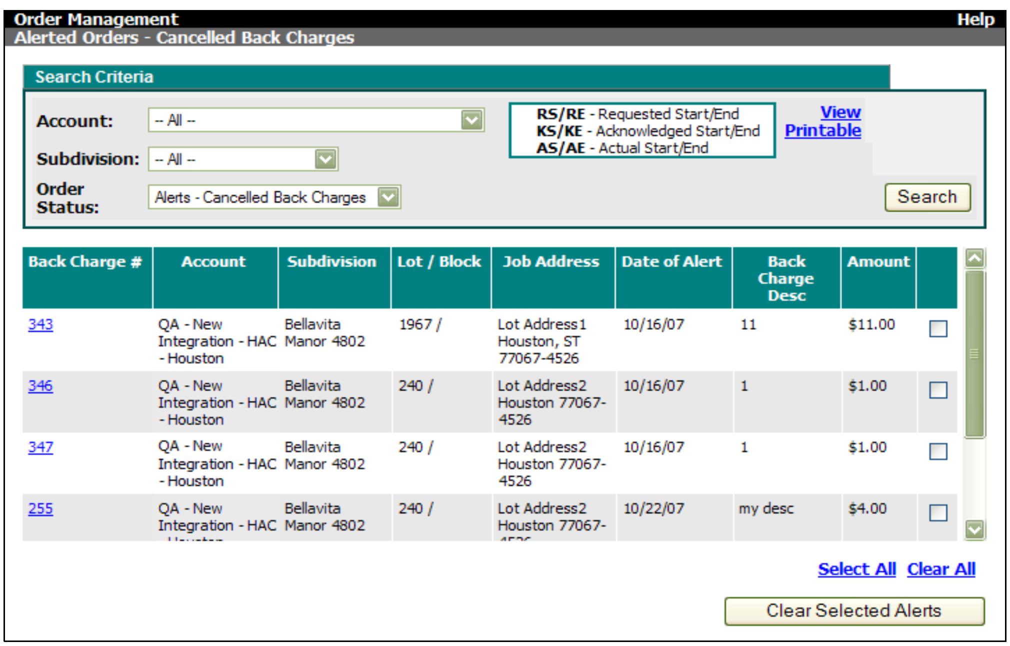


FIGURE 16. Alerted Orders - Cancelled Back Charges page

3. Click on a **Back Charge** # link to open the Back Charge Detail page.
Note: This page allows the user to view detail information for the back charge, similar to the information on the Order Detail page. Click on the Job link to open the Job Summary page.
4. Go back to the **Alerted Orders - Cancelled Back Charges** page.
5. Click the check box to the right of each cancelled back charge alert you want to clear.

6. Click the **Clear Selected Alerts** button at the bottom of the page. The alert is cleared from the page.

7. View cleared back charges on the **Back Charges** report. Search for back charges by status or the unique back charge number.

4 View & Upload Job Documents

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- Viewing BuildPro Documents
- Uploading New Documents
- Viewing SupplyPro Documents
- Editing SupplyPro Documents
- Deleting SupplyPro Documents

Overview

Document Management is the functionality that allows SupplyPro and BuildPro users to view and upload documents. In SupplyPro, users can view builder documents as well as upload supplier documents. The builder controls what documents a particular supplier can view and controls whether suppliers can upload documents to different folders.

In SupplyPro, Document Management has two parts:

- **New Documents List** - View newly added documents for each builder in a selected time period.
- **View Builder Documents** - View documents or hyperlinks uploaded by BuildPro or SupplyPro users. View the document history, as well as edit, update, or delete your SupplyPro documents.

Document Management Roles

A user must have at least one Document Management role to access Document Management:

- **Document Viewer Role** - Allows the user to view existing documents but not to upload new documents or change any existing documents. All Document Management roles can view the Document History by clicking the History icon on the View/Manage Documents page.
- **Document Admin Role** - Allows the user to perform all Document Viewer functions. This role also allows the user to view, edit, update, and delete existing documents as well as upload new documents. Edit, update, or delete a document using the Edit, Update, and Delete icons on the View/Manage Documents page.

Document Management Rules

- A SupplyPro user cannot edit, update, or delete a document uploaded by a BuildPro user or by a SupplyPro user from a different SupplyPro company.
- A BuildPro user cannot edit, update, or delete a document uploaded by a SupplyPro user.
- A BuildPro admin chooses whether SupplyPro users can access each folder. A SupplyPro user can only view/upload documents to a folder where the builder allows supplier access.
- Each time a BuildPro user uploads a document, he or she can choose specific suppliers who can view the document. If the BuildPro user does not choose specific suppliers, the document can be accessed by all SupplyPro users.
- BuildPro users can view all SupplyPro documents for suppliers assigned to their org level.

View the New Documents List

To view the New Documents List:

1. Log into SupplyPro. The Home page opens.

2. Click the **New Documents List** link in the **Builder Documentation** box on the left side of the page. The New Documents List page opens.

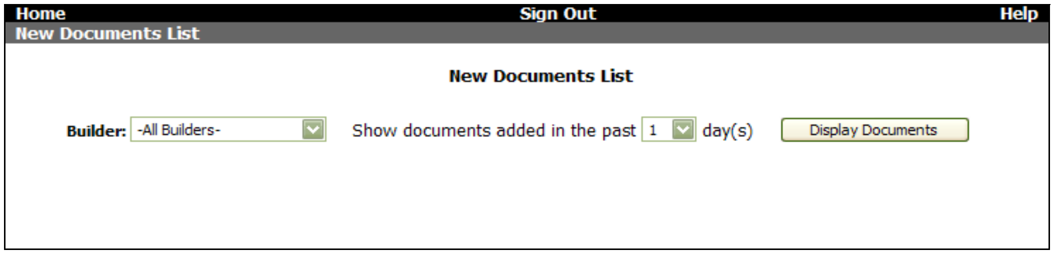
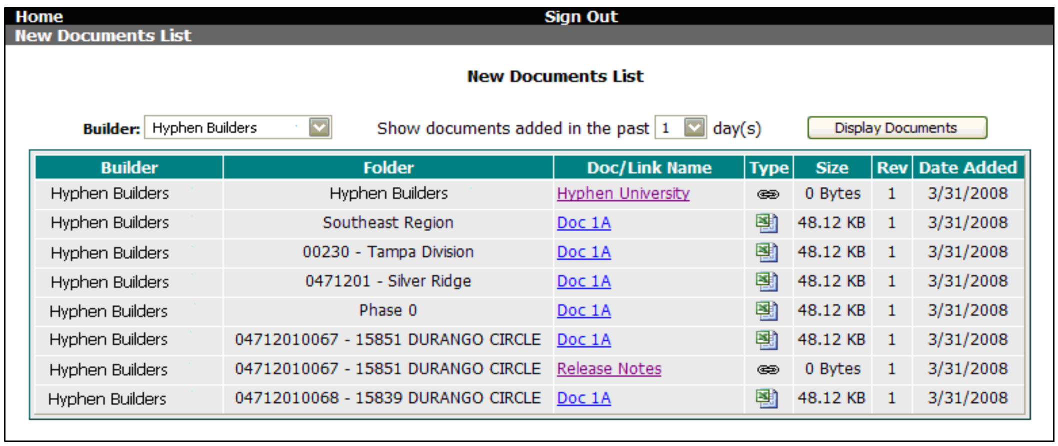


FIGURE 1. New Documents List page

3. Choose the builder you want to view from the **Builder** drop-down list.
4. Choose the **Number of Days** for which you want to view new documents.
5. Click the **Display Documents** button. The list of new documents appears.



Builder	Folder	Doc/Link Name	Type	Size	Rev	Date Added
Hyphen Builders	Hyphen Builders	Hyphen University		0 Bytes	1	3/31/2008
Hyphen Builders	Southeast Region	Doc 1A		48.12 KB	1	3/31/2008
Hyphen Builders	00230 - Tampa Division	Doc 1A		48.12 KB	1	3/31/2008
Hyphen Builders	0471201 - Silver Ridge	Doc 1A		48.12 KB	1	3/31/2008
Hyphen Builders	Phase 0	Doc 1A		48.12 KB	1	3/31/2008
Hyphen Builders	04712010067 - 15851 DURANGO CIRCLE	Doc 1A		48.12 KB	1	3/31/2008
Hyphen Builders	04712010067 - 15851 DURANGO CIRCLE	Release Notes		0 Bytes	1	3/31/2008
Hyphen Builders	04712010068 - 15839 DURANGO CIRCLE	Doc 1A		48.12 KB	1	3/31/2008

FIGURE 2. New Documents List page

6. To view the document, click on the **Doc/Link Name**. The document opens.
7. To help you locate the document on the **View Builder Documents** page, note the document's folder name in the **Folder** column.
Note: The folder name is not a hyperlink.

Navigate Through the Builder Documents

When navigating through the builder documents in SupplyPro, remember that the folder structure for each builder follows the builder's organizational structure.

For example, to view documents for the Job 100 JOHN M BOOR DRIVE, you must expand the Hyphen Builders Company, North Central Region, Chicago Division, Timber Trails Landmark Subdivision, and Phase 0 to view the correct job folder. Click on the Job folder to view the list of documents.
Note: Not all builders have regions.

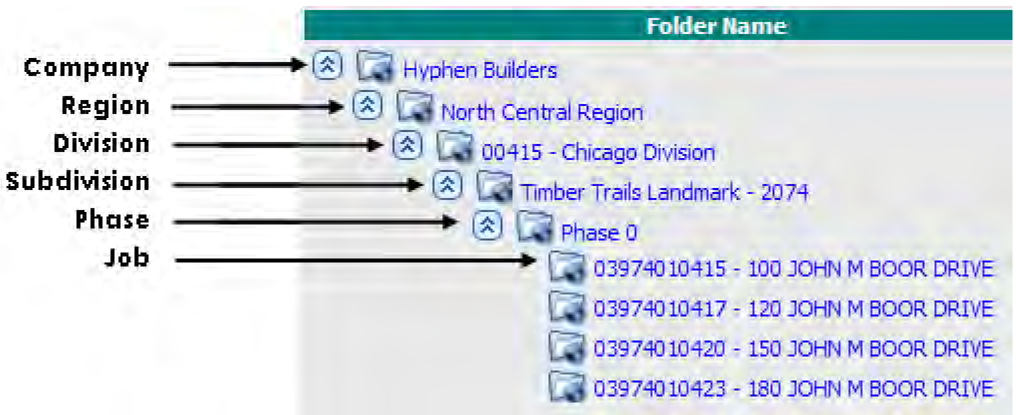


FIGURE 3. Builder folder structure in SupplyPro

View Builder Documents

To view builder documents:

1. Log into SupplyPro. The Home page opens.
2. Click on the **View Builder Documents** link in the **Builder Documentation** box on the left side of the page. The View Builder Documents page opens.

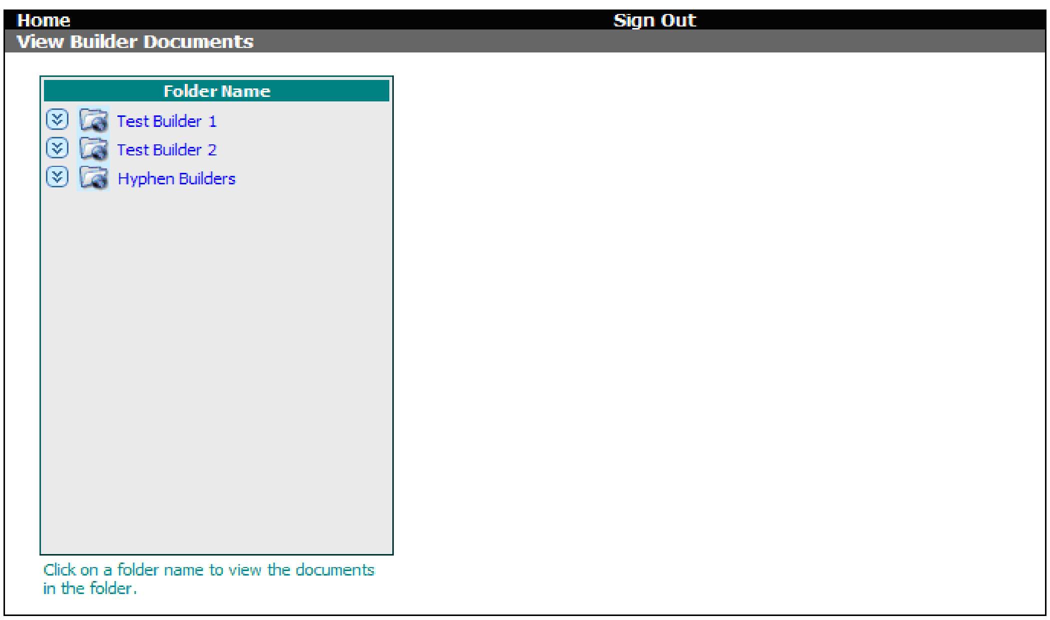


FIGURE 4. View Builder Documents page

3. Click on the down arrow next to a folder to view all of its subfolders. The down arrow changes to an up arrow.
4. Click on the **Folder Name** to view the folder's documents. The list of documents appears on the right side of the page.

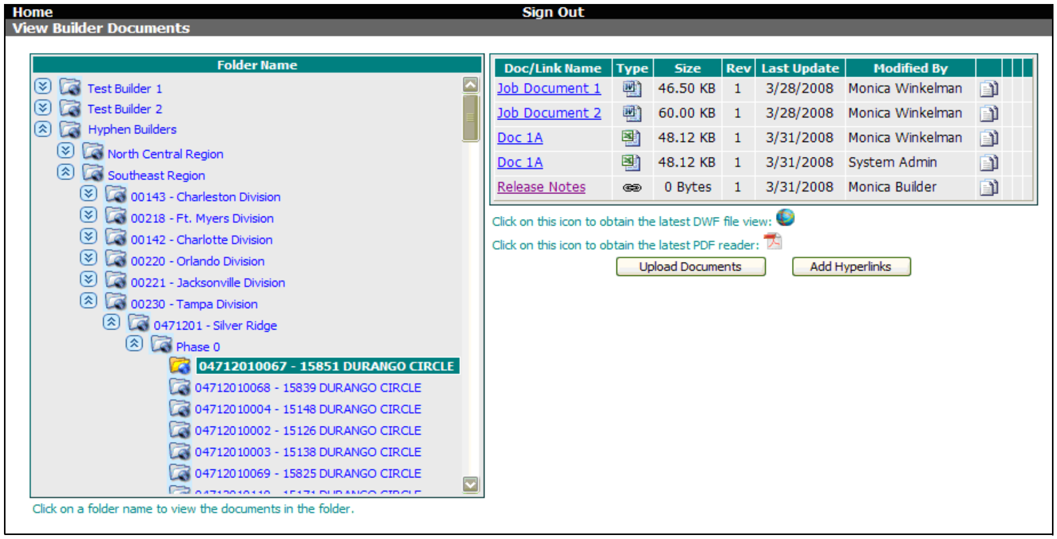


FIGURE 5. View Builder Documents page

5. Click on the **Document Name** link to view the document. A dialog box opens.
6. Click the **Open** button to view the document. Or, click the **Save** button to save the document onto your computer.
7. To view the history of the document, click on the **History** icon on the right side of the document row. The Document History pop-up window opens.
   Note: SupplyPro users only see activity on the History pop-up window from the builder and other users in their SupplyPro company.
8. To view the original document that was first uploaded, click on the **Uploaded** link under the **Action** column.

View Builder Documents - Page Columns

Doc/Link Name	Type	Size	Rev	Last Update	Modified By				
Migration Instructions 1		35.00 KB	1	3/31/2008	Monica Builder				
job		19.50 KB	1	3/31/2008	Monica Builder				
Doc 1B		32.99 KB	1	3/31/2008	Monica Supplier				
Doc 1C		48.12 KB	1	3/31/2008	Monica Supplier				
Doc 1A		48.12 KB	1	3/31/2008	Monica Builder				

FIGURE 6. View Builder Documents page - document list

Columns

- **Doc/Link Name** - Name of document of name of hyperlink. Click on this link to open the document or hyperlink in a new window.
- **Type** - Displays an icon for the document type or hyperlink: DOC, PDF, RTF, XLS, GIF, JPG, PNG, TIF, DWF, or Hyperlink.
- **Size** - The file size of the document. Max of 2 MB.

- **Rev** - The version number of the document.
- **Last Update** - The last time the document was modified in the system (e.g., document upload, document replaced, etc.)
- **Modified By** - The name of the user who last modified the document/hyperlink
- **History** - Allows user to view the history of a document in a pop-up window. Reading/ viewing is not tracked for hyperlinks.
- **Edit** - Allows admin user to edit information about the document or hyperlink.
- **Update** - Allows admin user to replace the existing version of a document with a new one. The Update functionality is not used for hyperlinks.
- **Delete** - Allows admin user to delete a document or link.

Edit an Existing Document

To edit an existing document:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Edit** icon on the right side of the document row. The Edit Document pop-up window opens.

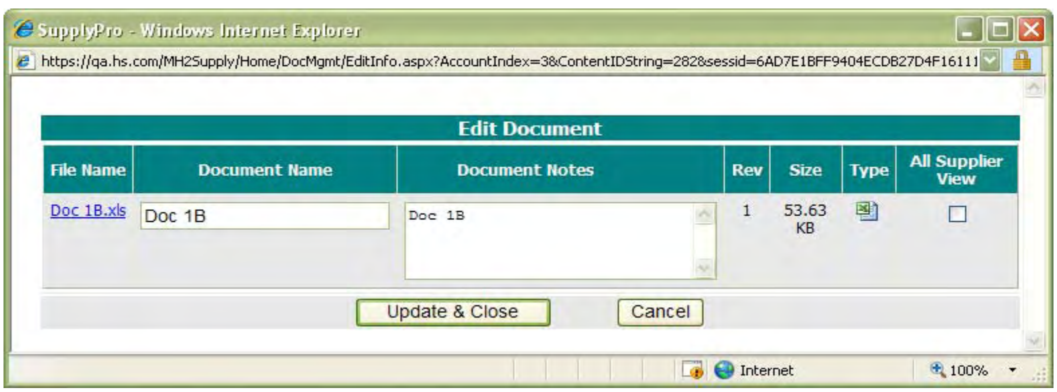


FIGURE 7. Edit Document pop-up window

3. Edit the **Document Properties** as necessary.
4. Click the **Update & Close** button.

Update an Existing Document

To update an existing document:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Update** icon on the right side of the document row. The Update Document pop-up window opens.

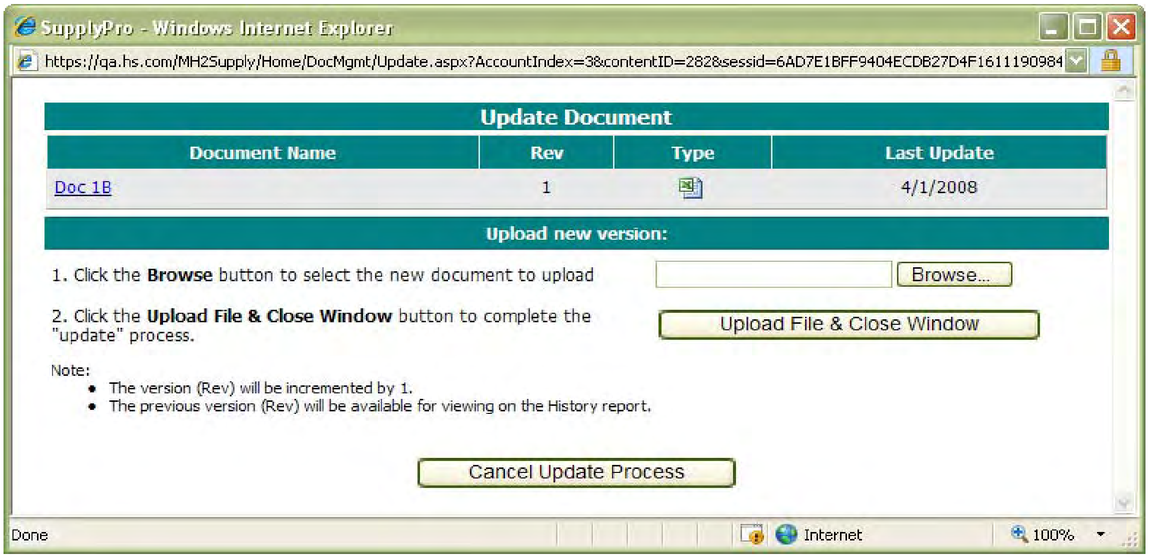


FIGURE 8. Update Document pop-up window

3. Click on the **Browse…** button. The Open File dialog box opens.
4. Locate the updated version of the document on your computer. Click on the file to select it, and click the **Open** button. The file appears in the Browse… box.
5. Click the **Upload Files & Close Window** button. The document appears in the document list in place of the previous version of the document.

Delete a Document

To delete a document:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Delete** icon on the right side of the document row. A confirmation message appears.

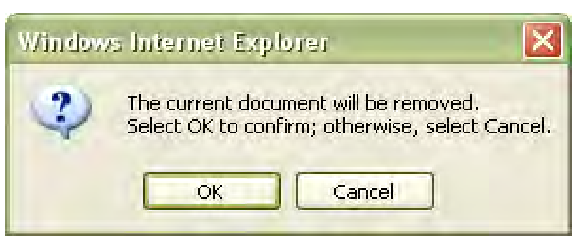


FIGURE 9. Confirmation message - click OK to delete the document

3. Click OK to delete the document. Or, click Cancel to close the message without deleting the document.

Upload a New Document

To upload a new document:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Upload Documents** button at the bottom of the page. The Upload pop-up window opens.
3. The first time you open this pop-up window, you may be asked to install an **ActiveX Control** called **SoftArtisans XFile**. This control is necessary for uploading documents. Click on the light yellow bar at the top of the pop-up window.

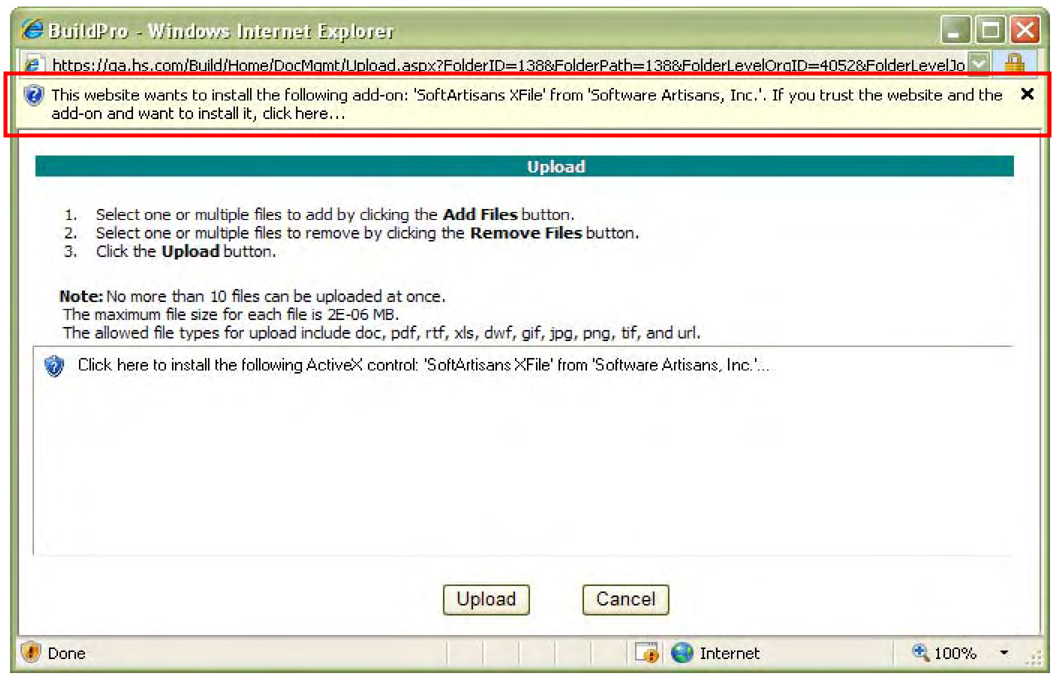


FIGURE 10. Upload pop-up window - install ActiveX Control

4. Choose **Install ActiveX Control** from the pop-up menu.

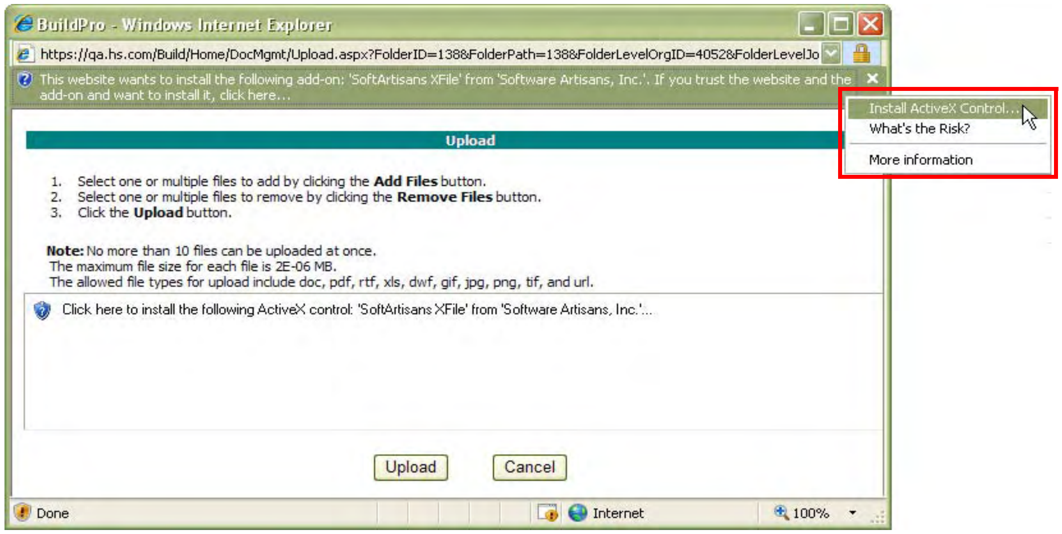


FIGURE 11. Upload pop-up window - install ActiveX Control

5. On the Security Warning pop-up window, click on the **Install** button.

FIGURE 12. Security Warning pop-up window

6. The ActiveX Control installs, and the Upload pop-up window is ready for you to upload documents.

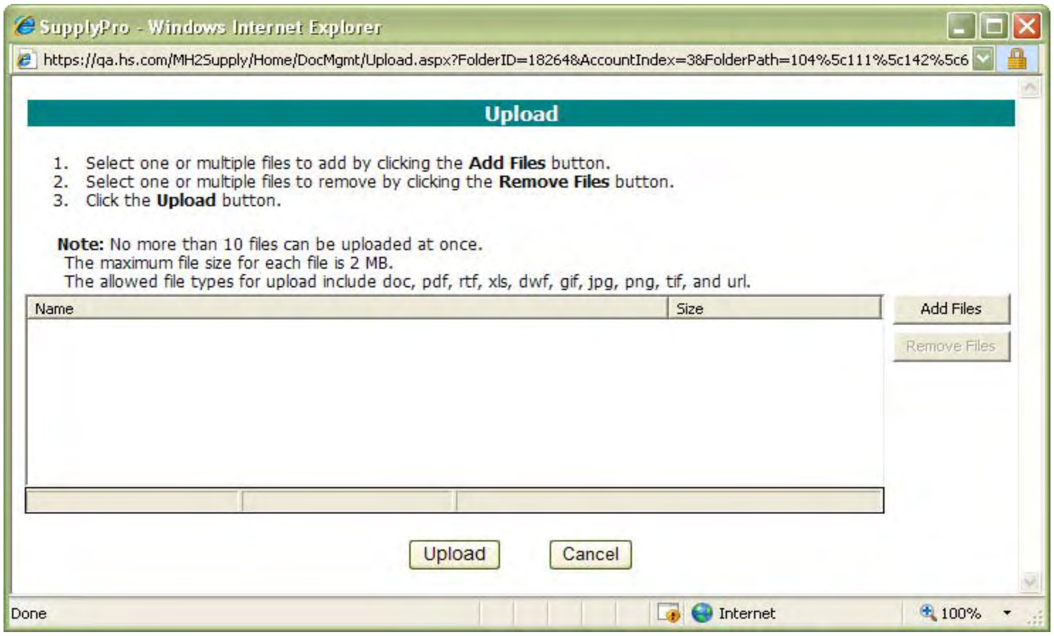


FIGURE 13. Upload pop-up window - ready to upload

7. Click on the **Add Files** button. The Add File dialog box opens.
8. Locate the document you want to upload. Click on the file to select it. To select multiple documents, hold down the **Ctrl** key while clicking on each document.

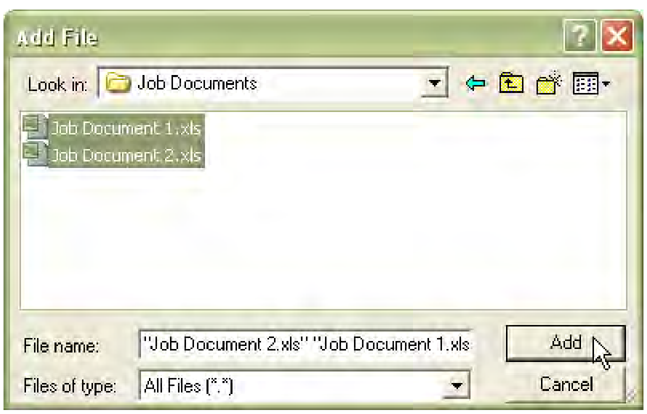


FIGURE 14. Add File dialog box

9. Click on the **Add** button. The file(s) you selected appear in the Upload pop-up window.

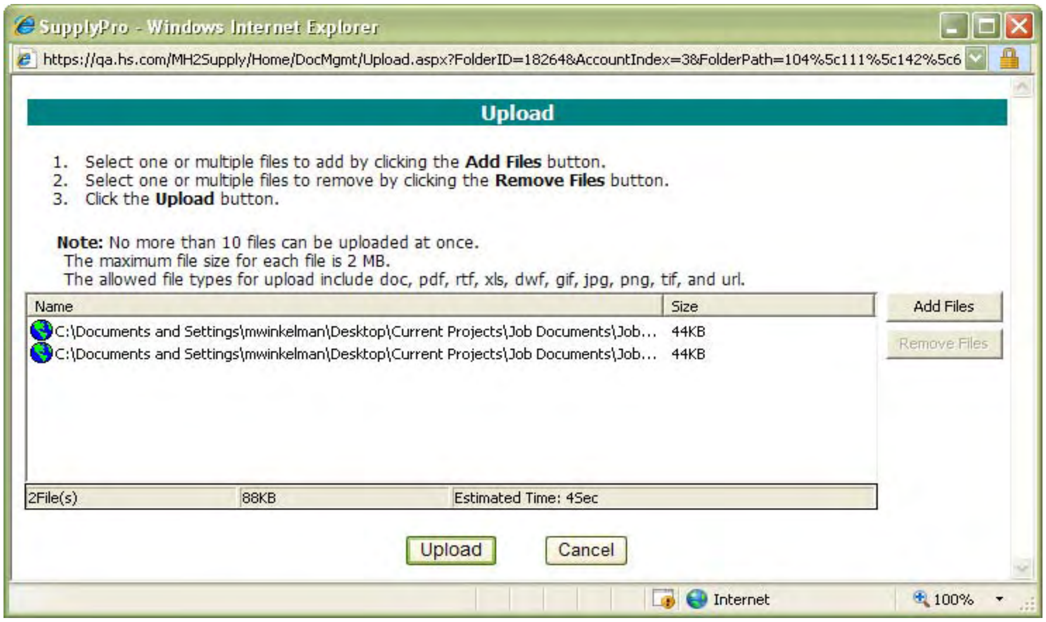


FIGURE 15. Upload pop-up window

10. Click the **Upload** button. The Upload Documents pop-up window opens.

11. For each document, enter a **Document Name** and **Document Notes**.

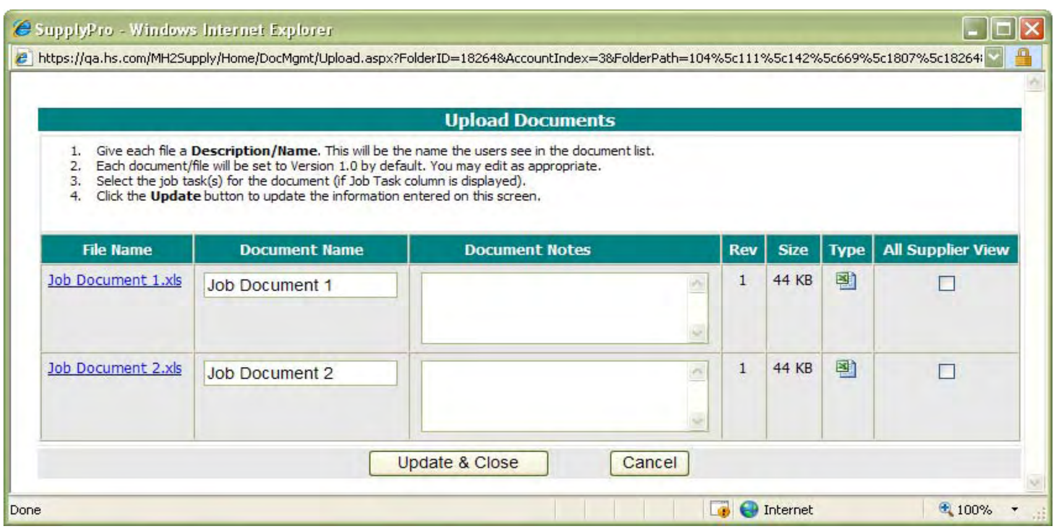


FIGURE 16. Upload Documents pop-up window

12. Click the **All Supplier View** check box at the end of each document row to allow all suppliers, including those from other SupplyPro companies, to view this document. Leave it unchecked to allow only the builder and other users in your company to view the document.

13. After you have entered information for all documents, click the **Update & Close** button on the Upload Documents pop-up window. The new document(s) appears on the document list.

Upload a New Hyperlink

To upload a new hyperlink:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Add Hyperlinks** button at the bottom of the page. The Add Hyperlink pop-up window opens.

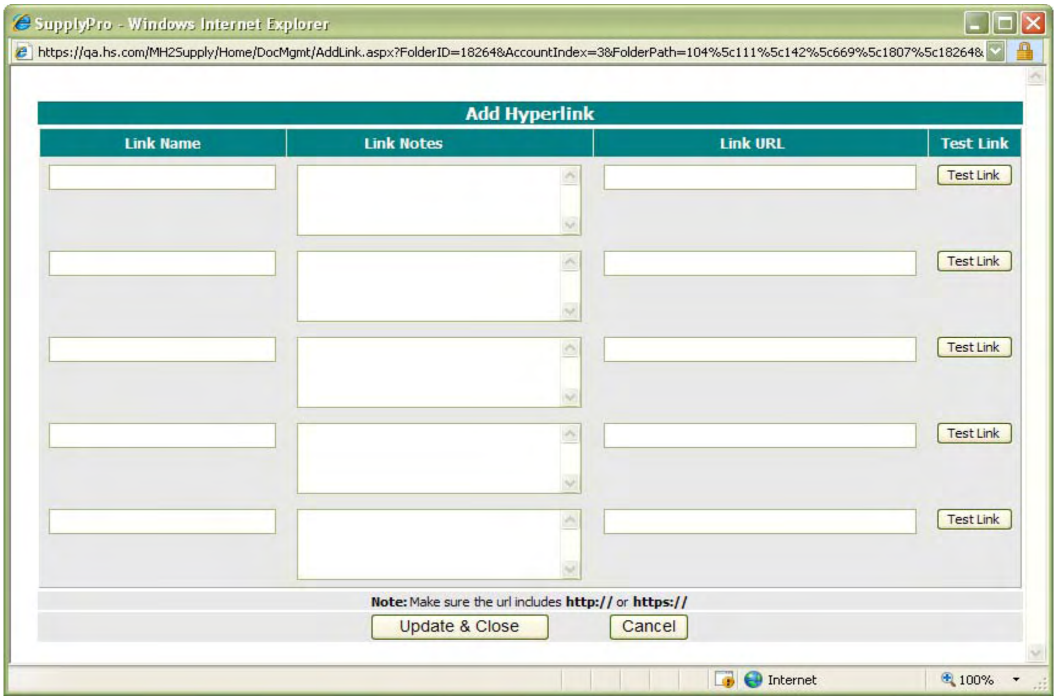


FIGURE 17. Add Hyperlink pop-up window

3. Enter the **Link Name**, which will be displayed in the document list.
4. Enter the **Link Notes**, which will appear as a tool tip when the user places the cursor over the link name.
5. Enter the **Link URL**, including the **http://** or **https://**.
6. Click the **Test Link** button to test that the link opens the correct web page. The web page opens in a new window.
7. On the Add Hyperlink pop-up window, click the **Update & Close** button. The link appears in the document list.

Doc/Link Name	Type	Size	Rev	Last Update	Modified By				
Release Notes		0 Bytes	1	3/31/2008	Monica Builder				
Doc 1A		48.12 KB	1	4/1/2008	Monica Builder				
Job Document 1		44.00 KB	1	4/1/2008	Monica Supplier				
Job Document 2		44.00 KB	1	4/1/2008	Monica Supplier				
Hyphen University		0 Bytes	1	4/1/2008	Monica Supplier				

FIGURE 18. View Builder Documents page - new link appears in list

5

Manage Orders

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- How BuildPro and SupplyPro work together
- What your responsibilities are
- The order processing steps
- The Orders tab and its functionality
- How to print orders from SupplyPro
- How to accept an order various ways
- How to complete an order and maintain correct dates

Overview

As stated earlier, BuildPro is the system the builder uses to manage the construction schedule, create purchase order requests for suppliers, send notes and change requests on these orders, and approve payment for completed orders.

SupplyPro is the system you will be using to manage these orders and send your own notes and change requests. These systems collaboratively communicate so that you can manage your schedule by accepting work, request date changes, respond to builder's change requests and complete orders as the work is finished.

When you open SupplyPro, you can access your order information in one of two ways:

- Click on a link in the Current Activity box or Alerts box on the Home page.
- Click on the Orders tab.

Order Process

It is very important to keep in mind that the system is NOT enitrely automatic. BuildPro and SupplyPro both require a human being on each side to do their part to ensure that an order is successfully processed. With that in mind, there are certain responsibilities that BOTH the builder and the supplier MUST do to make the system work successfully.

The figures in this chapter illustrate what occurs with an order from the time a builder starts a job, to the time it is completed, and details the step-by-step process, explaining what occurs at each step. Highlights of the graphics are numbered and detailed below.

Step 1: Builder Starts Task

The following steps describe how a builder starts a task and correspond to the numbered steps in the Step 1 example below.

1. The builder starts the task by going into the BuildPro schedule, selecting the task, and clicking Update.
2. The purchase order (PO) is created and sent to SupplyPro.
3. The order appears in SupplyPro in the Received folder.
4. The order is created, showing a Request date for the work to start and complete and a status of Received.

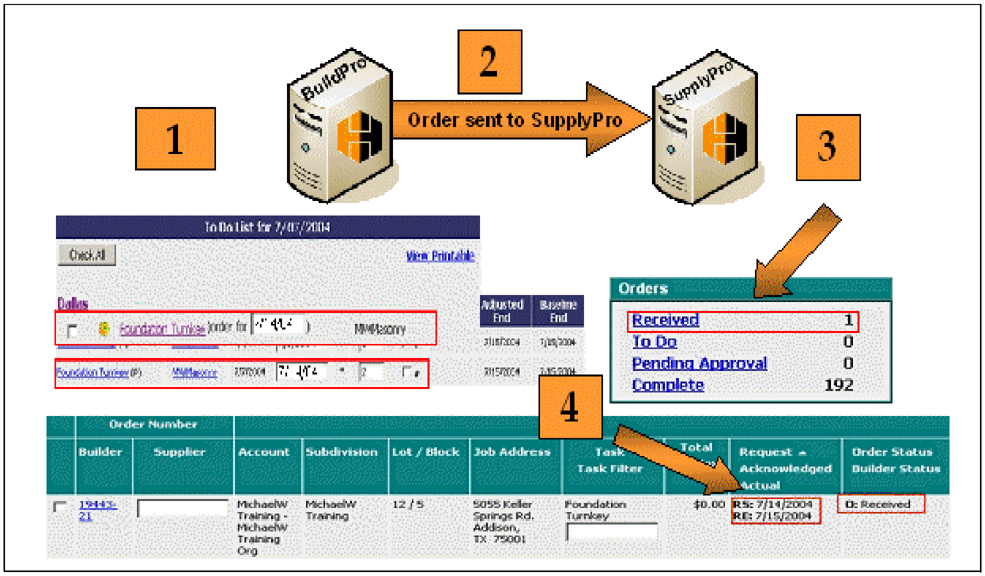


FIGURE 1. Step 1: Builder Starts the Task

Step 2: Supplier Accepts Order

The following steps describe what happens once an order is accepted by you in SupplyPro and correspond to the numbered steps in the Step 2 example below.

1. The order moves from the Received folder to the To Do folder.
2. An acknowledgement is sent to the builder that the order was accepted.
3. The Acknowledged date (KS / KE) is added to the order and the order status shows Accepted.

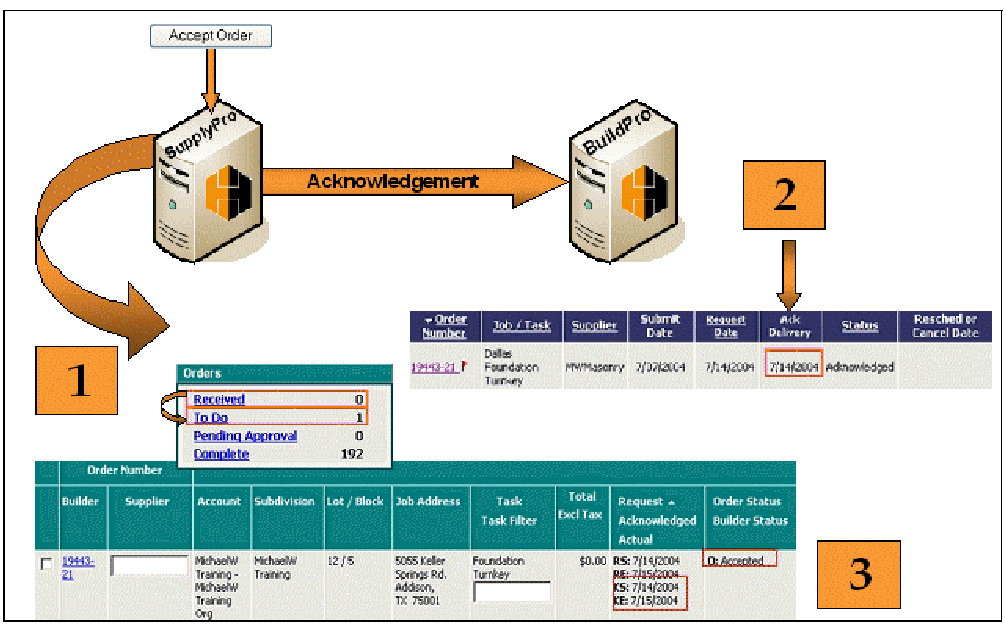


FIGURE 2. Step 2: Supplier Accepts Order

Step 3: Supplier Completes Order

The following steps describe what happens once work is physically completed, and you have completed the order in the SupplyPro To Do folder.

1. The order moves from the To Do folder to the Pending Approval folder.
2. An acknowledgement of the completion, in the form of an Alert, is sent from SupplyPro to BuildPro for the builder to see.
3. The order is updated with the Actual Start and End dates (AS / AE) and the order status is changed to Complete.

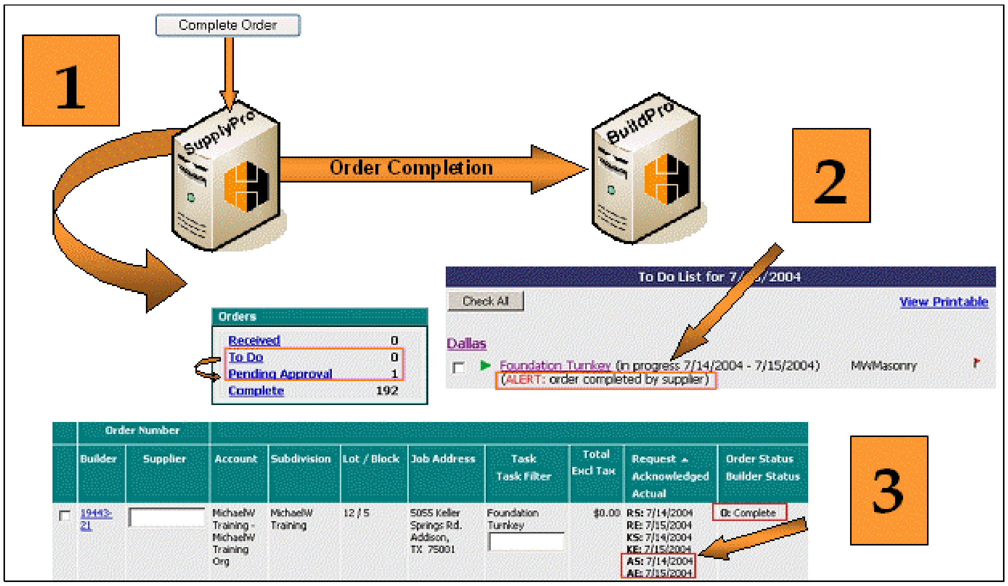


FIGURE 3. Step 3: Supplier Completes Order

Step 4: Builder Completes Order

The last steps in the process of an order are for the builder to "walk the job," and then go into BuildPro and complete the order. The following steps describe that process.

1. The builder goes into BuildPro and marks the task as complete.
2. This action generates a message to the builder's ERP (Back Office Accounting) System to start the process of payment to the supplier.
3. The order is moved out of the Pending Approval folder to the Complete Folder.
4. The Builder Status is added to the order in SupplyPro to show Complete, which indicates to the supplier that the builder has signed off.

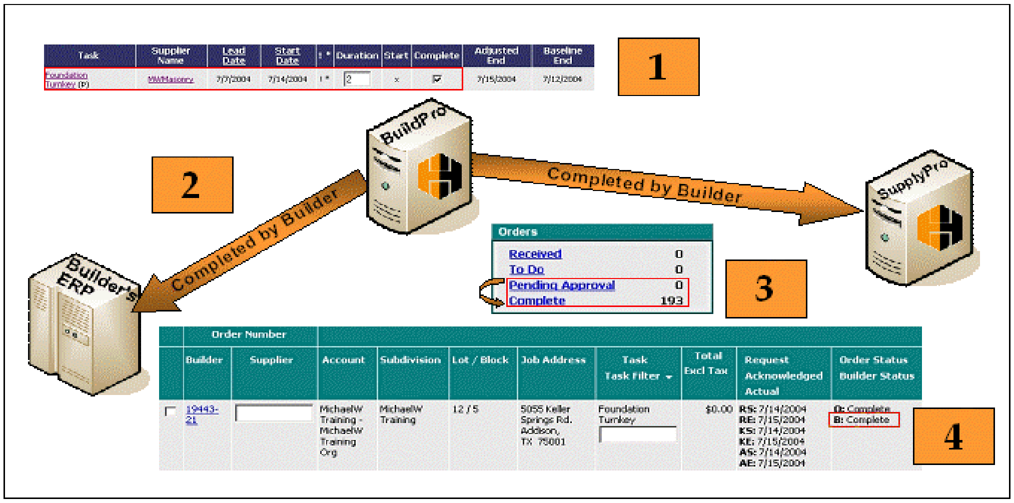


FIGURE 4. Step 4: Builder Completes Order

Order Management Page

The Orders tab is where you manage your orders by providing access to a variety of order/task list views and order details such as billing and shipping information, job location, order changes, builder notes, and order history status.

You can click any of the links on the Order Management page to see more detailed information on any order. At the top of the page are links to various groupings of orders. Click the Show Jobs with Active Orders link to open a list of all jobs with active orders. You can click an active order link to see the Order Detail page. The Orders tab is divided into the following sections:

Orders

The Orders section includes links for managing your orders by status

- **Received** - Links to the Received Orders list. Received orders are orders submitted to your company through BuildPro that have not been Accepted. See the topic on Managing Orders for more information.
- **To Do** - Links to the To Do Orders list. To Do orders are orders received and accepted by the supplier pending shipment.
- **Pending Approval** - Links to the Orders Pending Approvals list. Orders pending approval are those orders shipped and marked complete by the supplier, but not yet marked complete by the builder.
- **Complete** - Links to the Completed Orders list. Completed orders are shipped orders marked complete by both the supplier and the builder.

Alerts

The Alerts section includes links to lists of all orders with alerts. Alerts are orders requiring additional attention.Refer to the chapter on “Alerts” for more detailed information.

- **Orders with Unread Notes** - Links you to the Alerted Orders - Unread Notes page. This page shows all orders that have unread notes from the builder. You can read the notes from this page, and check off each note as you read them. Then click the Mark Selected Notes As Read button to remove the alert from the order.
- **Order Cancellations** - Links you to the Alerted Orders - Cancellations page. This page shows you all orders that the builder has cancelled. To remove the alert notice, you must go into the Order Detail and respond to the change request, which shows the request to cancel the order.
- **Order Reschedules** - Links you to the Alerted Orders - Reschedules page. Rescheduled orders are accepted orders that are rescheduled by the builder in BuildPro. These orders must either be re-accepted or declined by the supplier.
- **Change Orders** - Links you to the Alerted Orders - Change Orders page. You can dismiss the alert from the Order Detail page – Change Request tab. Notification of nearly all changes that create an alert appear on this tab.
- **Over Shipped Orders** - Links you to the Alerted Orders - Over Shipped Orders page. You can clear this alert when you click the Clear Over Shipped Alert button on the Order Detail page.
- **Jobs with New Documents** - Links you to the Alerted Orders - New Documents page. The Alerted Orders - New Documents page displays jobs that have a new job document attached to them. Click the View link under View Document to pop up a list of job documents attached to that job.
- **Pending Back Charges** - Links you to the Alerted Orders - Pending Back Charges page, which displays the list of pending back charges submitted by the builder.
- **Completed Back Charges** - Links you to the Alerted Orders - Completed Back Charges page, which displays the list of completed back charges submitted by the builder.
- **Cancelled Back Charges** - Links you to the Alerted Orders - Cancelled Back Charges page, which displays the list of cancelled back charges submitted by the builder.

Links

- **Assign Orders** - This link is for companies with the Assign Orders module implemented. This link accesses the Assign Orders page, which supports the ability to assign individual orders to specific users, rather than automatically assigning orders to the users linked to the builder account. This is an optional feature in SupplyPro.
- **Manual Order Entry** - This link provides a step-by-step form to manually enter builder orders for accounts in your Account Manager, who are not using BuildPro.
- **Order Search** - Allows you to quickly search for orders by order numbers, lot numbers, block numbers, account, subdivision or order status.
- **Builder Complete Cleanup** - Click this link to open the Builder Complete Cleanup page, where the user can view orders that have been completed by the builder but have not yet been completed by the supplier. Orders that have already been completed by the supplier do not appear on this list.
- **Show Jobs with Active Orders** - Click this link to open a list of all jobs with active orders. This section lists builders and jobs for which there are active orders in your system. An active order is an order that has not been marked as Complete by the builder. Click an order link to open the Order Detail page.

Note: You can also view a list of jobs on the Jobs Report. This report lists all jobs, showing the job start date, builder account, job name, subdivision, lot/block, plan/elevation/swing, the total of all orders for the job, and the total of all jobs on the report.

Calendar

- When you click on a day on the calendar, you see the order information for that day. The Day Calendar provides a view of all Received, Rescheduled, To Do and Complete orders on a given day, with an option to scroll one month forward or backward.

Jobs with Active Orders

When the Orders tab opens, you will see a link on the pages that says "Show Jobs with Active Orders." Click this link to view the list of jobs that contain active orders. You can also view a list of jobs with active orders on the Jobs Report (Reports tab). This report provides users with a more comprehensive list of jobs that can be filtered by account, subdivision, or job.

To view the list of jobs with active orders:

1. Click the **Orders** tab. The Order Management page opens.

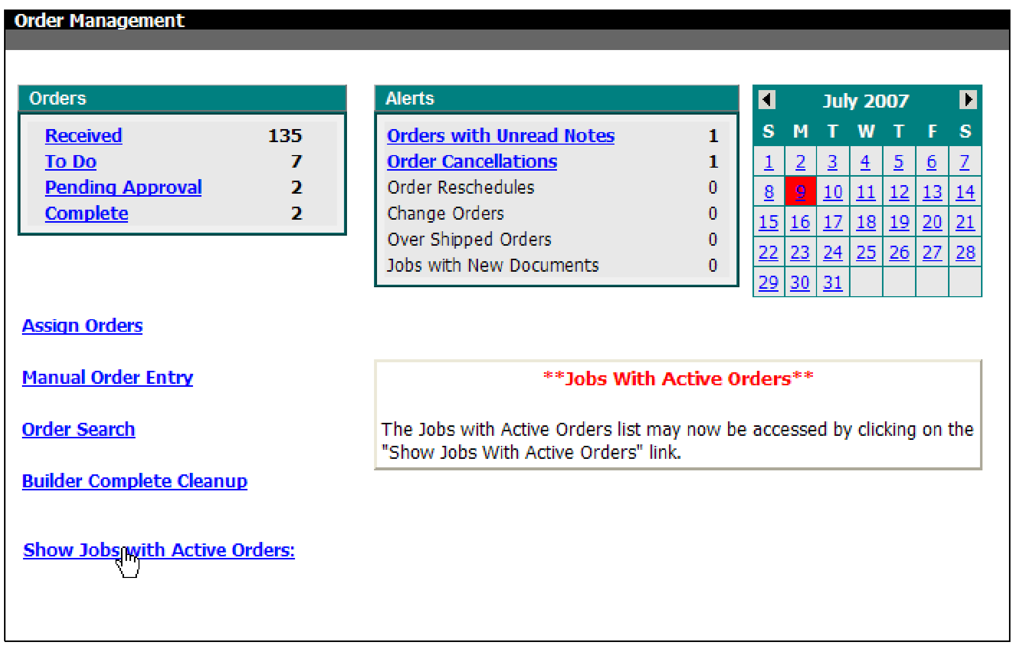


FIGURE 5. Order Management page

2. Click the **Show Jobs with Active Orders** link in the bottom left of the page. The list of job that contain active orders appears on the page.

FIGURE 6. Jobs with Active Orders

3. Click a **Job** link to open the Job Summary page for that job.
Note: Identify late tasks by the red highlighted task rows. Late tasks also display **(Late)** in red text under the Order Status. Only applies to tasks in Received or To Do status.

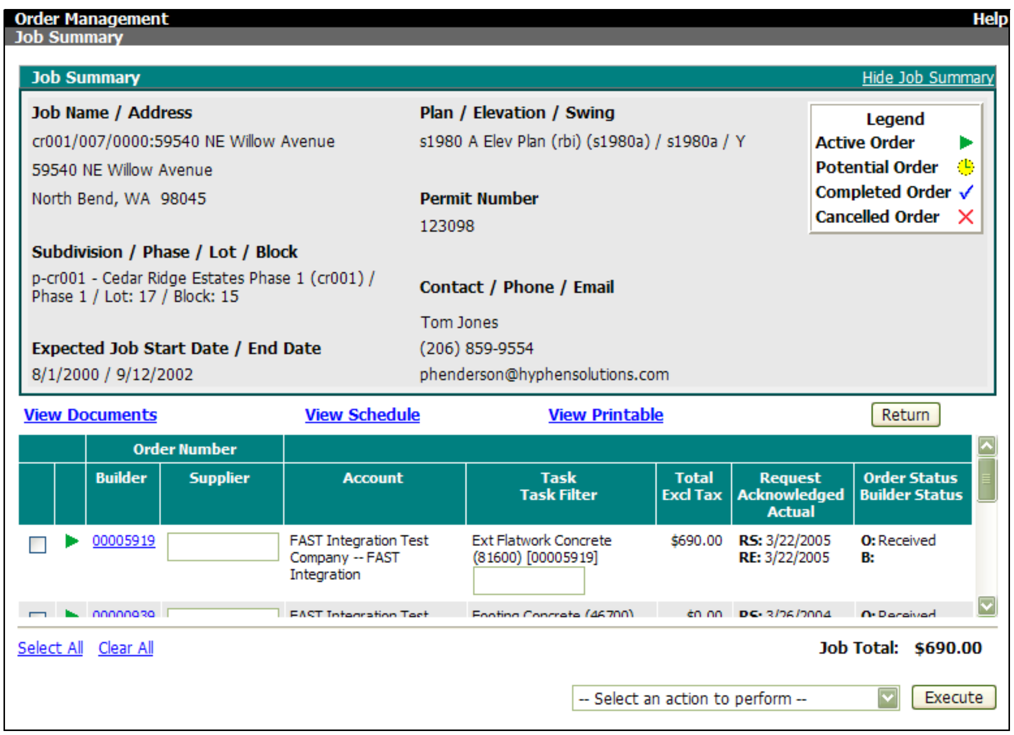


FIGURE 7. Job Summary page

Order List

The Order List allows you filter and view orders in several statuses. The following are the four main statuses that you will work with in SupplyPro:

- **Received** - New order received from BuildPro.
- **To Do** - Once you accept the order, the order goes into the To Do orders, and a notification is sent to the builder.
- **Pending Approval** - Once you perform the work, you mark the order complete in SupplyPro. Your completion notification is sent to BuildPro, so the builder can mark the order complete in BuildPro.
- **Complete** - Once the builder marks the order complete in BuildPro, the order in SupplyPro is moved to Complete status.

You may also view orders in three other statuses, but these are rarely used in your daily work in SupplyPro. All of the main sections are set up in exactly the same format.

- **Builder Complete Cleanup** - This order list shows you orders that have been completed by the builder but not by the supplier.
- **Canceled** - Orders that have been canceled are moved the Canceled Orders list.
- **Declined** - Orders that you have received and declined go into the Declined Orders list.

Order List Columns

All pages that contain actual orders (Received, To Do, etc.) are set up in the same basic way, with search criteria at the top. By selecting different criteria, such as account, sub-division and job address, you can narrow the scope and amount of orders appearing on the screen. Filter by Order Type to see only EPOs, MPOs, Memos, or Purchase Orders.

Once you have displayed the orders you want to see on the screen, you can then sort the orders by any of the column titles. Simply click on the title word to sort by that column's information.

Each column on the Order List pages contains important information about the order. The columns are same on all of the Order List pages (Received, To Do, Pending Approval, Complete, and Canceled).

- **Late Tasks** - Identify late tasks on the Order List page by the red highlighted task rows. Late tasks also display **(Late)** in red text under the Order Status. Only applies to tasks in Received or To Do status.
- **Task Alerts** - If a task has an alert, it appears directly under the task row in red text. Go to the Alerted Orders page to clear the alert.

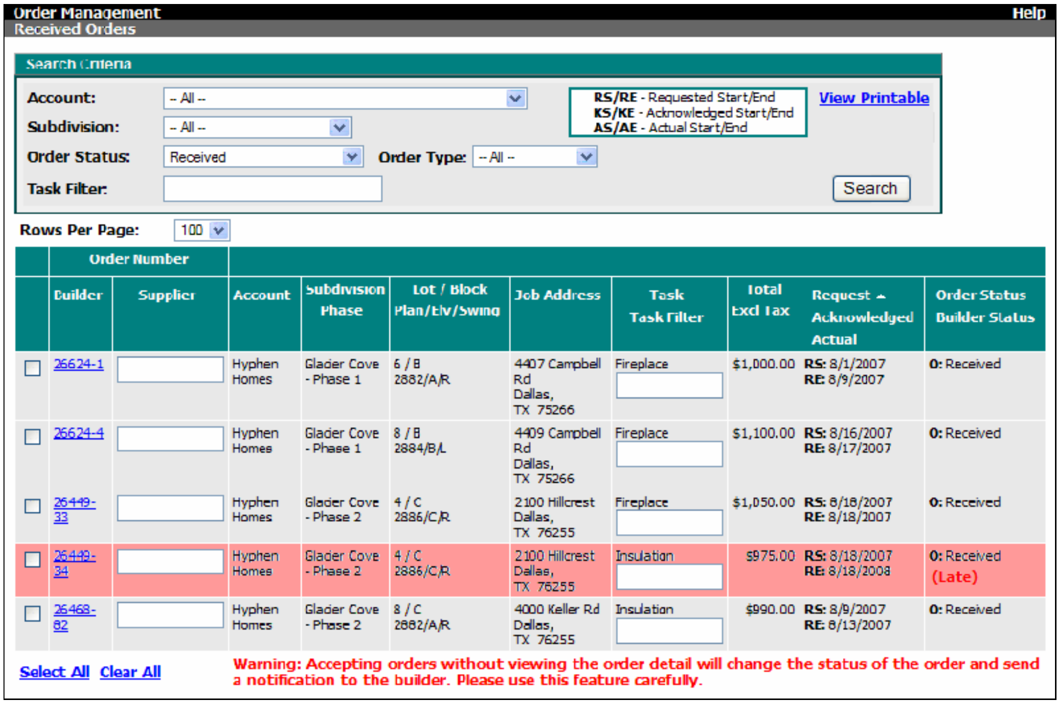


FIGURE 8. Order List page - Received Orders

Each column on the Received, To Do, Pending Approval, or Complete pages contains important information about the order.

- **Check Box** - The first column has no title, but by checking the small box in this column, you select an order, telling SupplyPro that the order selected is what you are working on. To select an order, simply click with your mouse in the box, and a check mark will appear.
- **Builder** - Shows the purchase order number that was sent to SupplyPro from the builder. The order number acts as a hyperlink. By clicking on the number, SupplyPro will take you into the detail of the order, so that you can see line item details, and unit pricing, as well as perform other critical functions, such as processing alerts, entering notes etc.
  Note: EPOs are denoted with (E) in the Order Number. NTE EPOs are denoted with (NTE) in the Order Number.
- **Supplier** - The column where you can add your own criteria to search by. This becomes a permanent part of the order when you update it, and then you may search by whatever information you add. It merely becomes additional criteria which can be used when searching for orders. This information is not transmitted to the builder.
  Note: After entering information, be sure to click on the "Update Supplier Info for Selected Orders" button to save the information to the order.
- **Account** - The builder name and/or division.
- **Subdivision** - The subdivision when the order is associated with.
- **Lot / Block** - The lot number and/or block assigned to the job site by the builder.
- **Job Address** - The physical address of the job site.
- **Task** - The name of the task the builder wants your company to perform. The Task Filter, which is located beneath the task name, is another area which suppliers can use to assign orders to individuals or teams. Once assigned, the Task Filter can be used as additional search criteria, or used to create a calendar.

Note: After entering information, be sure to click on the "Update Supplier Info for Selected Orders" button to save the information to the order.

- **Total Excl Tax** - Shows the amount of the purchase order, excluding any taxes.
- **Request / Acknowledged / Actual** - Shows the requested (RS, RE) start and end dates that the task was requested for, the acknowledged (KS, KE) start and end dates that you acknowledged that you would perform the work or deliver materials, and the actual (AS, AE) start and end dates that the work was actually performed or materials were physically delivered. The order starts in the Received area with only RS / RE dates listed. As you go through the different steps of order processing, the KS / KE and AS / AE dates will be added. There is a key in the Search Criteria box to help you remember what RS/RE, KS/KE and AS/AE means.
- **Order Status / Builder Status** - Shows the status of the order. The "O" followed by a status indicates the status the order has in SupplyPro. "O: Received" means the order is in the "Received" status. "O: Accepted" indicates the order has been accepted and is in the "To Do" status. "O: Complete" means that you have completed the order in SupplyPro, and depending on the builder status, it is either in the "Pending Approval" status or the "Complete" status. The "B" followed by a status indicates the status that the order is in on the builder's side, in BuildPro. Usually, you will see "B: Complete" once the builder marks a task complete on the BuildPro side.

Order Search

The quickest way to find an order is to use the Order Search function in SupplyPro. You can search by order number, supplier number, lot number, or by account, subdivision, and even job address. You can also look by order status, or pull up only orders assigned to a particular task filter or task type.

Each column on the Order Search page contains important information about the order. Some orders also contain extra information:

- **Late Tasks** - Identify late tasks on the Order Search page by the red highlighted task rows. Late tasks also display **(Late)** in red text under the Order Status. Only applies to tasks in Received or To Do status.
- **Task Alerts** - If a task has an alert, it appears directly under the task row in red text. Go to the Alerted Orders page to clear the alert.
- **EPOs** - EPOs are denoted with (E) in the Order Number. NTE EPOs are denoted with (NTE) in the Order Number.

To search for an order:

1. On the Orders tab, click the **Order Search** link on the Order Management page or on the Left Nav Bar. The Order Search page opens.
2. Enter the **Search Criteria** into the appropriate fields, and click the **Search** button to display the orders that fit your criteria.
3. To perform a **Quick Search**, enter at least **5** letters or numbers of a job address in the **Address** field of the **Search Criteria**.

4. Click the **Search** button. The Order Search page displays the job or jobs that match your criteria.

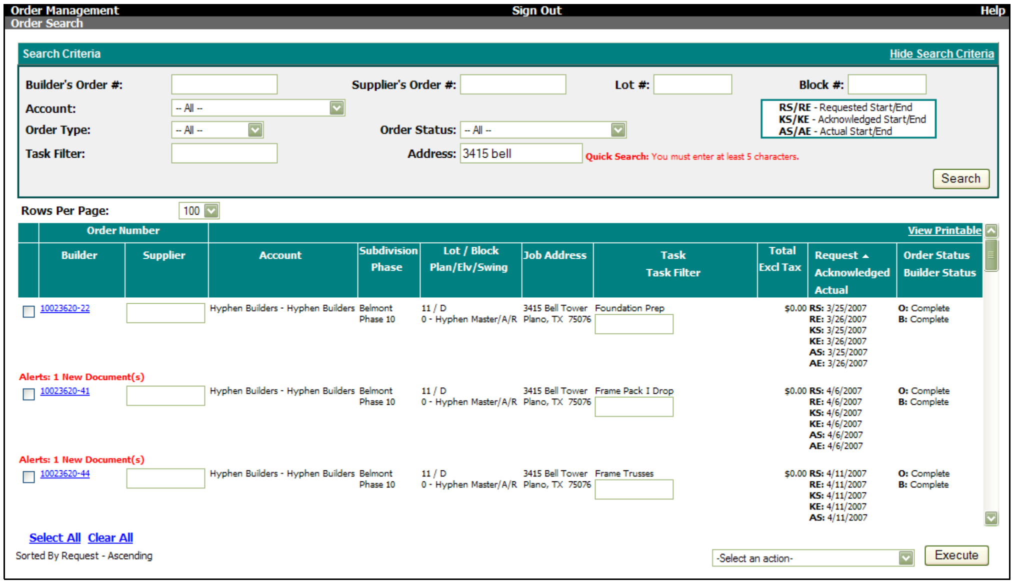


FIGURE 9. Order Search page

Print Orders and Delivery Tickets

You can print orders and/or delivery tickets from almost any area of the Orders tab, such as any of the main order pages (Received, To Do, Pending Approval, or Complete) as well as from the alerts or order search areas. A printed order contains all information about the order, including pricing and historical information, whereas a delivery ticket contains everything except pricing and historical information.

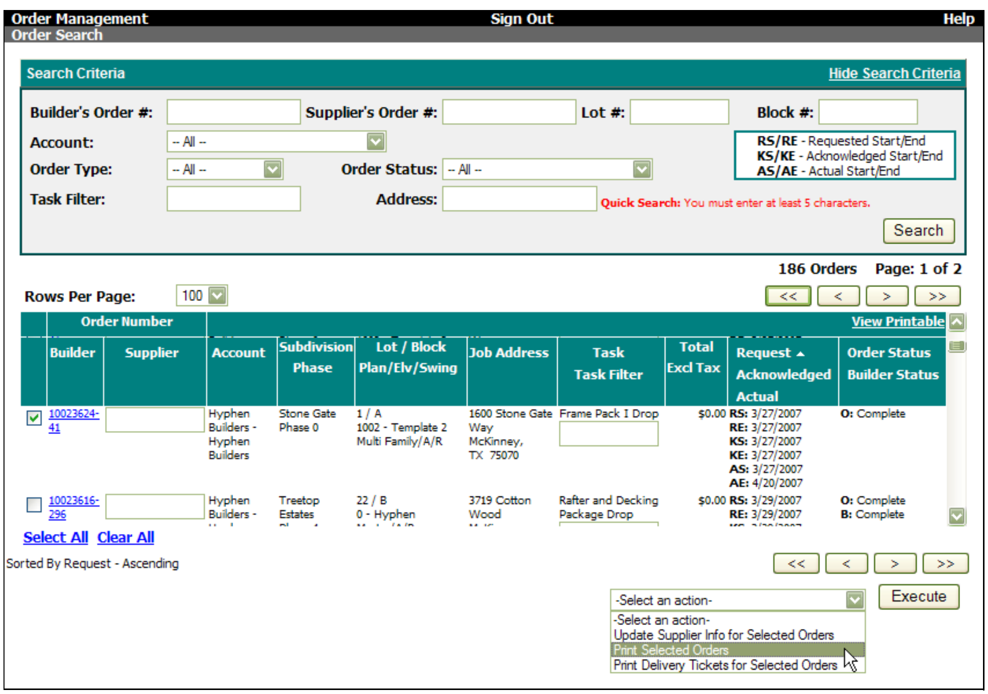


FIGURE 10. Print orders and delivery tickets

To print purchase orders or deliver tickets:

1. Click the check box next to the left of each order you want to print.
   Note: Print multiple orders at the same time by placing check marks next to all the orders you want to print.
2. From the Select an action drop-down list at the bottom of the page, choose **Print Selected Orders** or **Print Delivery Tickets for Selected Orders**.
3. Click the Execute button. The printable version of the order detail opens in a separate window.
4. To send the information to your printer, simply click the rinter icon at the top of the preview window. Or, click on the **File** menu option and choose **Print**.
5. When printing multiple orders, SupplyPro will automatically place a page break after each order, so that you get a separate page for each order.

Order Detail

All sections of the Orders tab (Received, To Do, Pending Approval, and Complete) show only listings of orders that are present in each section. To look at more information about each order, access the Order Detail by clicking on the blue builder order number link in the Builder column.

To view the order detail:

1. Click on the **Orders** tab. The Order Management page opens.
2. Click on an order status in the **Orders** box or on the Left Nav Bar. The Order List opens filtered by the status you chose.
3. Click on an **Order Number** under the **Builder** column. The Order Detail page opens.

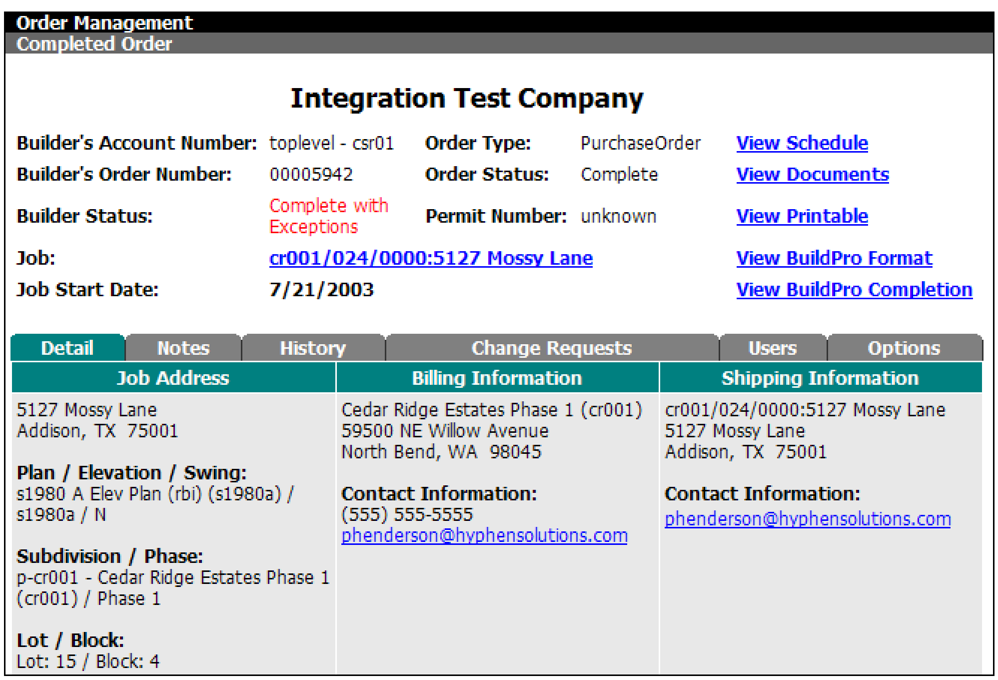


FIGURE 11. Order Detail page

Order Detail Tabs

There are six tabs on the Order Detail page (some may not be visible, depending on the user's security access):

- **Detail** - Contains all contact information, an area to add Supplier Information, a section to request different dates, and all line item details and unit pricing. This tab also shows the summary order, which summarizes line items based on the SKU number (if supplied by the builder). Click the View Item Detail at the bottom of the page to view the line item detail for the summary order.
- **Notes** - Allows you to read notes from the builder, and clear the notes alerts from within the order, as well as send notes to the builder, without changing the status of the order.
- **History** - Contains a complete history of the order, with a date and time stamp on each event that happens with the order.
- **Change Requests** - Used to process Cancellations, Reschedules and Change Orders Alerts. Alerts are covered in more detail in the "Alerts" section of this chapter.
- **Users** - Assign or un-assign users from the order.
- **Options** - This tab may or may not contain information from the builder regarding the options, upgrades, or colors that are needed on the order. The builder may choose to send you this information in other ways as well.

Order Detail Links

View more detailed about the order and the job by clicking on one of these are six possible links that can appear on the Order Detail page:

- **View Schedule** - View the current Job Schedule with up-to-date schedule dates.
- **View Documents** - View documents attached to this job on the View Builder Documents page.
- **View Printable** - View a printable version of the order, including information from all Order Detail tabs.
- **View BuildPro Format** - View the order in the original builder format that was emailed or faxed to the supplier.
- **View BuildPro Completion** - View the BuildPro version of the builder's Delivery Receipt Notification (completion notice). This link only appears after the order has been received by the builder in BuildPro, which changes the Builder Status to Complete.
- **View Job Summary** - Click the **Job Name** link to access the Job Summary page.

Order Detail Tabs

Detail Tab

The Detail tab is the default page view. It contains general information about the order such as the Job Address, Billing, and Shipping information. It also lists specific tasks and line items associated with the order. Depending on your order status, certain fields may not allow updates.

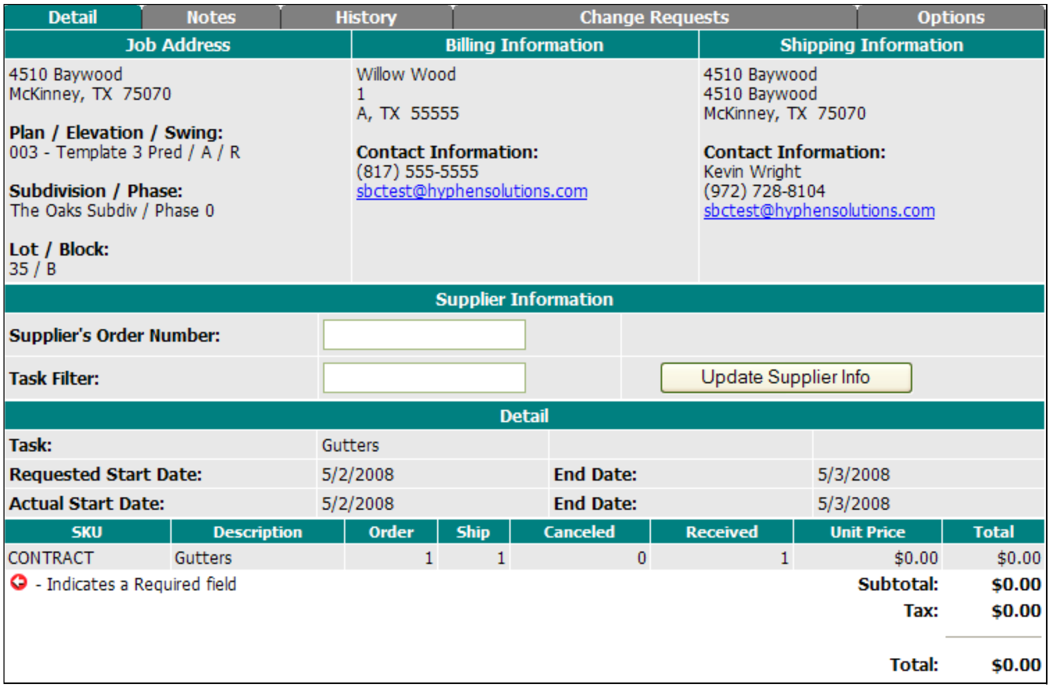


FIGURE 12. Order Detail page - Detail tab

Notes Tab

The Notes tab contains any notes attached to the order. Notes are entered by the builder in BuildPro or by the supplier in SupplyPro. You can send notes to the builder without changing the status of an order. The Notes tab shows you when the note was sent, the user name who sent the note, action pertaining to the note and the actual text of any notes pertaining to the job.

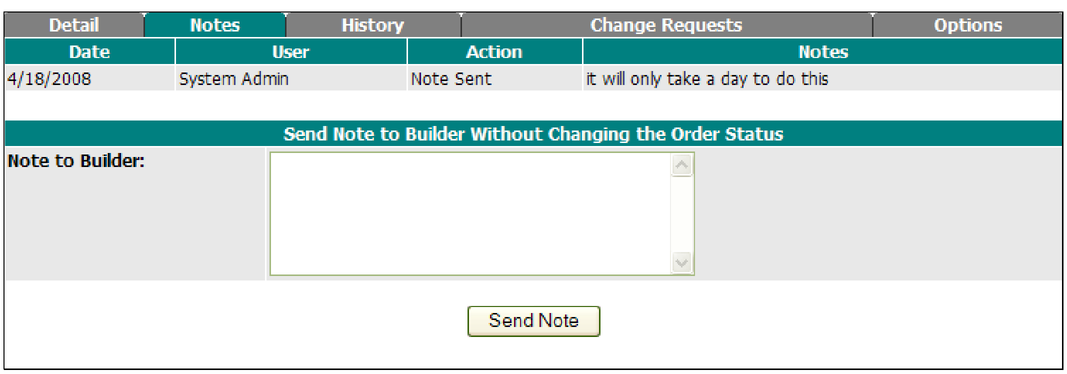


FIGURE 13. Order Detail page - Notes tab

History Tab

The History tab helps you track order progression from the time it was received until the time it was shipped, showing you all of the different statuses and corresponding dates and times.

Detail	Notes	History	Change Requests	Options	
From	**Action**	**BP Status**	**SP Status**	**Notes / Additional Information**	**Date**
BP Kevin Wright	Order Submitted **(S)** 6/10/2008 - **(E)** 6/11/2008	Submitted	Received	Let me know if this date doesn't work for you.	6/9/2008 10:14:23 AM
SP System Admin	Order Note Read Receipt	Submitted	Received		6/9/2008 10:14:59 AM
SP System Admin	Order Acknowledged	Acknowledged	Accepted	I need to move this back two days. Does that work?	6/9/2008 10:20:36 AM
SP System Admin	Order Rescheduled By Supplier **(S)** 6/10/2008 - **(E)** 6/11/2008 to **(S)** 6/12/2008 - **(E)** 6/13/2008	Pending BP Confirmation	Accepted		6/9/2008 10:20:36 AM
SP Ramer	Order Note Read Receipt	Acknowledged	Accepted		6/9/2008

FIGURE 14. Order Detail page - History tab

Change Requests Tab

The Change Requests tab displays all order changes made by the builder - such as rescheduling or canceling the order within the supplier's notification lead time parameters. Pending change requests display a message on all of the Order Detail tabs.

Detail	Notes	History	Change Requests			Options
Request		**Acknowledged**				
Date	**Type**	**Status**	**Response**	**Date**	**User**	**Action**
4/18/2008	Reschedule	Complete	Accepted	4/30/2008	montalvo	

FIGURE 15. Order Detail page - Change Requests tab

Users Tab

The Users tab appears only for companies with the Assign Orders module turned on. It allows the user to assign individual orders to specific users, rather than automatically assigning orders to users linked to the builder account. Learn more in the Assign Orders section (end of the chapter).

Detail | Notes | History | Change Requests | Users | Options

Assigned Users	Available Users
☐ Admin, System Remove Selected Users	**All available users have been selected**

FIGURE 16. Order Detail page - Users tab

Options Tab

The Options tab allows you to view additional information about the specific options, if any, associated with the order. This information comes from the builder's job/task information stored in BuildPro. If the order does not have any options, the Options tab remains blank.

Detail	Notes	History	Change Requests	Options
No options found				

FIGURE 17. Order Detail page - Options tab

Order Detail Links

View Schedule Link

One of the biggest problems in the construction industry that suppliers have to deal with are "dry runs," or rather, getting to a job site and being unable to work because the construction of the house has fallen behind schedule. This can be costly and time consuming, and SupplyPro offers a couple of ways to help avoid this happening to you. Working Reschedule Alerts is the first way to avoid this.

Another way to avoid "dry runs" is to view the schedule from BuildPro before your company shows up onsite to work. One of the greatest features about SupplyPro is that you have the ability to view the construction schedule directly from BuildPro and see where the builder is in the construction of the house, based on the schedule that the builder maintains in BuildPro.

To access the schedule:

1. On the Order Management page, click any **Order Type** in the **Orders** box. Or, click any **Order Type** from the Left Nav Bar under **Orders**. The Order List page opens filtered by the order type you chose.
2. Click the **Order Number** link. The Order Detail page opens.
3. Click on the **View Schedule** link. The Job Schedule page opens.

FIGURE 18. Order Detail page - View Schedule link

4. If you see that the task is in **Complete** status on the BuildPro schedule, you can feel confident that the task is completed physically and should be ready for you to perform your work.

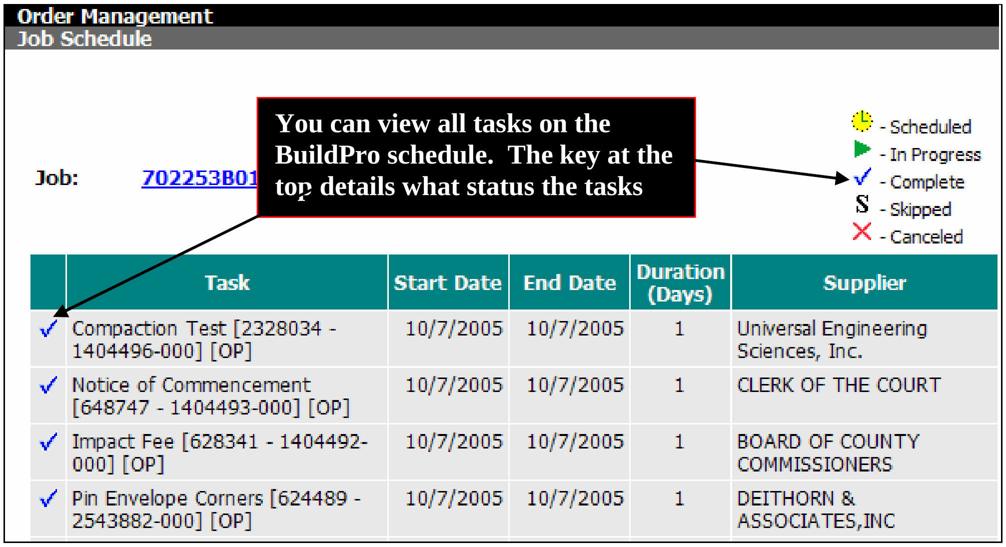


FIGURE 19. Job Schedule page

5. If the task shows **In Progress** or **Scheduled**, this indicates that the task is not completed on the BuildPro schedule, and it would be advisable to call the construction manager to determine whether you should show up as scheduled or not.
   Note: Even if the task is not complete on this schedule, do NOT cancel or delay showing up for the task without first checking with the Construction Manager. It could be that the builder is actually ready for you, but simply has not yet updated the software to reflect the completion status on the tasks ahead of you.

View Documents Link

This is an optional feature which some builders use and some do not. All builders have the ability to upload documents to any job in BuildPro, and grant viewership of those documents to their suppliers.

To access any uploaded documents:

1. On the Order Management page, click any **Order Type** in the **Orders** box. Or, click any **Order Type** from the Left Nav Bar under **Orders**. The Order List page opens filtered by the order type you chose.
2. Click the **Order Number** link. The Order Detail page opens.

FIGURE 20. Order Detail page - View Documents link

3. Click on the **View Documents** link, on the right above the History tab. The View Builder Documents page opens, showing the job folder and any documents it contains

4. Refer to the chapter "View & Upload Job Documents" for more information on how to view documents.

View Printable Link

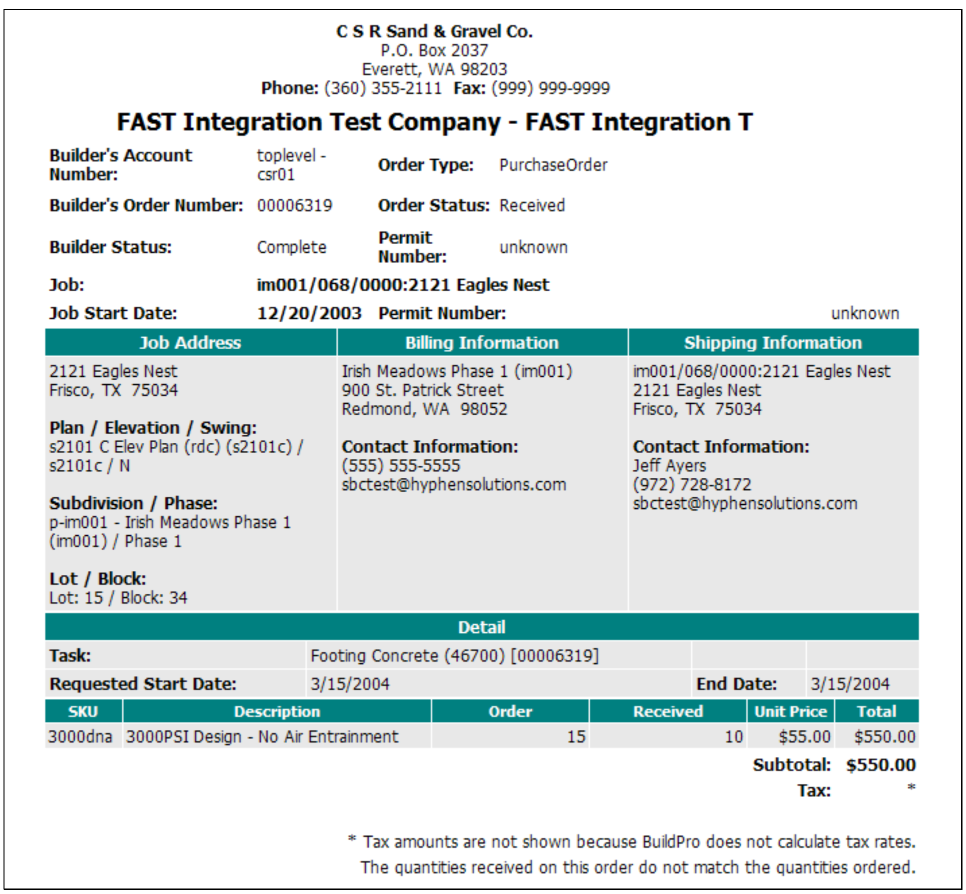
The View Printable link allows the user to view the order detail in a format that is printer-friendly. Click the View Printable link to open a separate window with the printer-friendly version. This version is defaulted to print on 8.5 x 11 paper in Portrait orientation.


Order Management
Receive Order

FAST Integration Test Company - FAST Integration T

Builder's Account Number:	toplevel - csr01	**Order Type:**	PurchaseOrder	View Schedule
Builder's Order Number:	00006319	**Order Status:**	Received	View Documents
Builder Status:	Complete	**Permit Number:**	unknown	View Printable
Job:	im001/068/0000:2121 Eagles Nest			View BuildPro Format
Job Start Date:	12/20/2003			View BuildPro Completion

FIGURE 21. Order Detail page - View Printable link


C S R Sand & Gravel Co.
P.O. Box 2037
Everett, WA 98203
Phone: (360) 355-2111 **Fax:** (999) 999-9999

FAST Integration Test Company - FAST Integration T

Builder's Account Number:	toplevel - csr01	**Order Type:**	PurchaseOrder
Builder's Order Number:	00006319	**Order Status:**	Received
Builder Status:	Complete	**Permit Number:**	unknown
Job:	im001/068/0000:2121 Eagles Nest		
Job Start Date:	12/20/2003	**Permit Number:**	unknown

Job Address	Billing Information	Shipping Information
2121 Eagles Nest Frisco, TX 75034 **Plan / Elevation / Swing:** s2101 C Elev Plan (rdc) (s2101c) / s2101c / N **Subdivision / Phase:** p-im001 - Irish Meadows Phase 1 (im001) / Phase 1 **Lot / Block:** Lot: 15 / Block: 34	Irish Meadows Phase 1 (im001) 900 St. Patrick Street Redmond, WA 98052 **Contact Information:** (555) 555-5555 sbctest@hyphensolutions.com	im001/068/0000:2121 Eagles Nest 2121 Eagles Nest Frisco, TX 75034 **Contact Information:** Jeff Ayers (972) 728-8172 sbctest@hyphensolutions.com

Detail

Task:	Footing Concrete (46700) [00006319]		
Requested Start Date:	3/15/2004	**End Date:**	3/15/2004

SKU	Description	Order	Received	Unit Price	Total
3000dna	3000PSI Design - No Air Entrainment	15	10	$55.00	$550.00

Subtotal: $550.00
Tax: *

* Tax amounts are not shown because BuildPro does not calculate tax rates.
The quantities received on this order do not match the quantities ordered.

FIGURE 22. View Printable version of an order

View BuildPro Format Link

The View Builder Format link on the Order Detail page allows SupplyPro users to view the order in the original format sent out by the builder. SupplyPro users can print the builder format from SupplyPro. This allows suppliers who do not use email or fax to get the same version of the BuildPro PO that is currently only emailed or faxed. Users are still be able to view the SupplyPro standard PO format by clicking on the View Printable link.

The View Builder Format link will only be visible if an order is being viewed for a BuildPro account. The link is not be visible if the user is viewing an order from a manually added builder or if the user does not have the security access to view pricing.

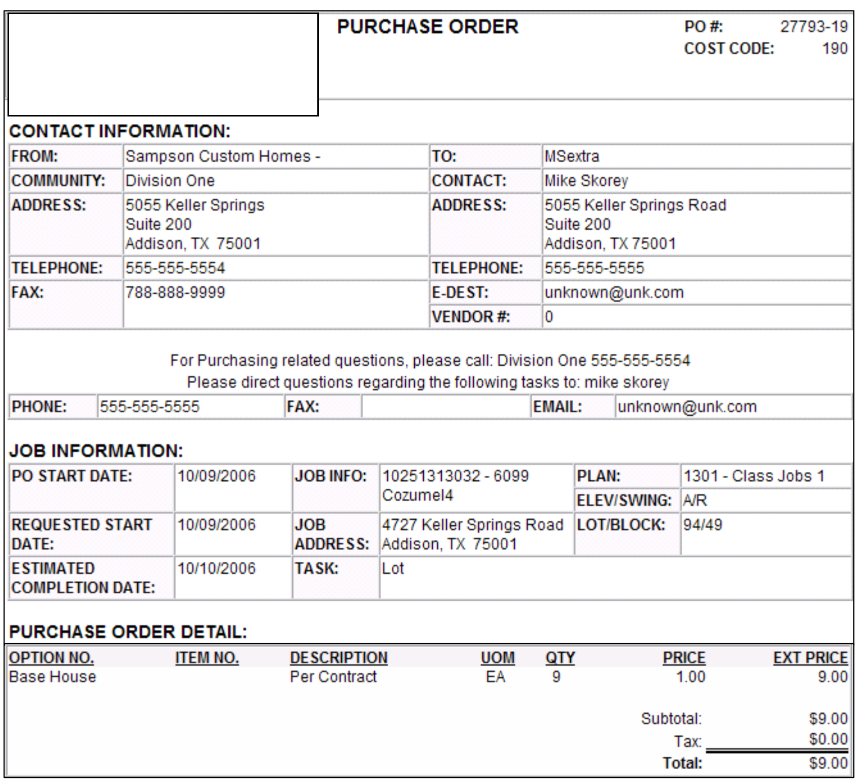
On the Order Detail page, click the View Builder Format in the top right corner of the page. A new window opens, showing the order in the original format that the builder sent to the supplier through fax or email.

Order Management
Receive Order

FAST Integration Test Company - FAST Integration T

Builder's Account Number:	toplevel - csr01	**Order Type:**	PurchaseOrder	View Schedule
Builder's Order Number:	00006319	**Order Status:**	Received	View Documents
Builder Status:	Complete	**Permit Number:**	unknown	View Printable
Job:	im001/068/0000:2121 Eagles Nest			View BuildPro Format
Job Start Date:	12/20/2003			View BuildPro Completion

FIGURE 23. Order Detail page - View BuildPro Format link



PURCHASE ORDER

PO #: 27793-19
COST CODE: 190

CONTACT INFORMATION:

FROM:	Sampson Custom Homes -	TO:	MSextra
COMMUNITY:	Division One	CONTACT:	Mike Skorey
ADDRESS:	5055 Keller Springs Suite 200 Addison, TX 75001	ADDRESS:	5055 Keller Springs Road Suite 200 Addison, TX 75001
TELEPHONE:	555-555-5554	TELEPHONE:	555-555-5555
FAX:	788-888-9999	E-DEST:	unknown@unk.com
		VENDOR #:	0

For Purchasing related questions, please call: Division One 555-555-5554
Please direct questions regarding the following tasks to: mike skorey

PHONE:	555-555-5555	FAX:		EMAIL:	unknown@unk.com

JOB INFORMATION:

PO START DATE:	10/09/2006	JOB INFO:	10251313032 - 6099 Cozumel4	PLAN:	1301 - Class Jobs 1
				ELEV/SWING:	A/R
REQUESTED START DATE:	10/09/2006	JOB ADDRESS:	4727 Keller Springs Road Addison, TX 75001	LOT/BLOCK:	94/49
ESTIMATED COMPLETION DATE:	10/10/2006	TASK:	Lot		

PURCHASE ORDER DETAIL:

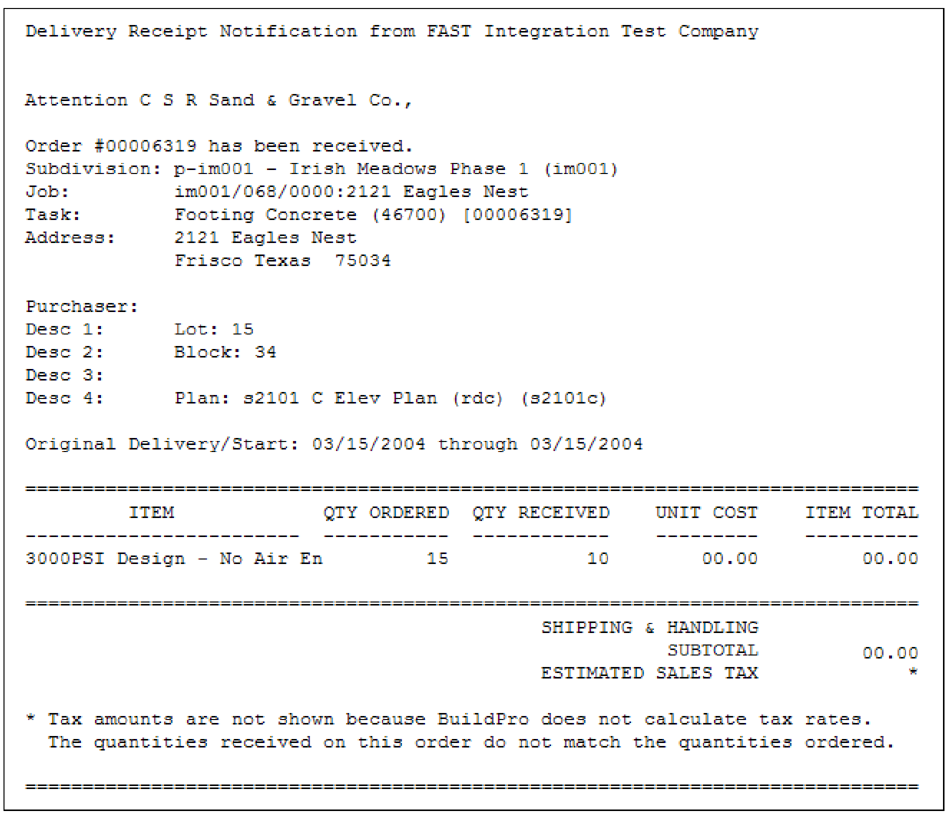
OPTION NO.	ITEM NO.	DESCRIPTION	UOM	QTY	PRICE	EXT PRICE
Base House		Per Contract	EA	9	1.00	9.00
					Subtotal:	$9.00
					Tax:	$0.00
					Total:	$9.00

FIGURE 24. View BuildPro Format - Builder purchase order

View BuildPro Completion Link

The View BuildPro Completion link allows the user to view the BuildPro version of the builder's Delivery Receipt Notification (completion notice). This link only appears on the Order Detail afer the order has been received by the builder in BuildPro, which changes the Builder Status to Complete.

FIGURE 25. Order Detail page - View BuildPro Completion link



```
Delivery Receipt Notification from FAST Integration Test Company


Attention C S R Sand & Gravel Co.,

Order #00006319 has been received.
Subdivision: p-im001 - Irish Meadows Phase 1 (im001)
Job:         im001/068/0000:2121 Eagles Nest
Task:        Footing Concrete (46700) [00006319]
Address:     2121 Eagles Nest
             Frisco Texas  75034

Purchaser:
Desc 1:      Lot: 15
Desc 2:      Block: 34
Desc 3:
Desc 4:      Plan: s2101 C Elev Plan (rdc) (s2101c)

Original Delivery/Start: 03/15/2004 through 03/15/2004

==============================================================================
         ITEM             QTY ORDERED  QTY RECEIVED    UNIT COST    ITEM TOTAL
------------------------  -----------  ------------    ---------    ----------
3000PSI Design - No Air En         15            10        00.00         00.00

==============================================================================
                                             SHIPPING & HANDLING
                                                        SUBTOTAL         00.00
                                             ESTIMATED SALES TAX             *

* Tax amounts are not shown because BuildPro does not calculate tax rates.
  The quantities received on this order do not match the quantities ordered.

==============================================================================
```

FIGURE 26. View BuildPro Completion link - sample builder delivery receipt notification

View Job Summary Link

The Job Summary page summarizes important information about a job, including plan/elevation, subdivision name and address, lot/block designation, permit number and primary contact information.

To view the Job Summary page:

1. Click the **Job Name** link on the Order Detail page. The Job Summary page opens.
   Note: EPOs are denoted with (E) in the Order Number. NTE EPOs are denoted with (NTE) in the Order Number.

2. Identify late tasks by the red highlighted task rows. Late tasks also display **(Late)** in red text under the Order Status. Only applies to tasks in Received or To Do status.

3. To return to the Order Detail page, click the **Order Number** link. The Order Detail page opens.

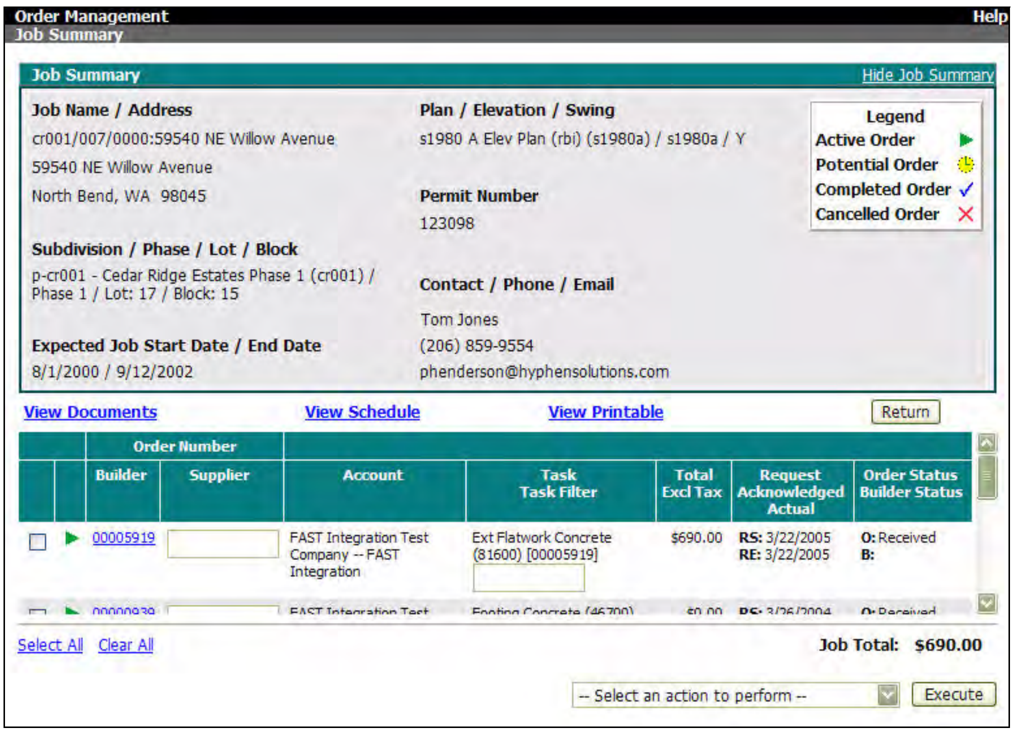


FIGURE 27. Job Summary page - access from the Order Detail page

Accept Orders

There are two different scenarios for accepting orders in SupplyPro:

1. Accept a basic order with no changes to the price or dates.
   - Accept from main screen, with no changes.
   - Check order detail, and accept with no changes.

2. Accept an order with a date change request.

Each scenario is described in more detail below along with instructions on how to accept orders in that scenario.

Scenario 1: Accept with No Changes

Orders can be accepted from the main Received orders page, only if the correct price is listed and the dates the builder has requested are acceptable to you. You can also accept an order from the Order Detail page.

To accept orders from the Received Orders page:

1. Verify that the dates and amount of the order are acceptable to you. If so, proceed with the next steps. If not, see the following pages in this guide for handling date or price changes.
2. Click the check box to the left of the order number to select the order. Multiple orders can be selected at the same time.
3. Click the **Accept Selected Orders** button.

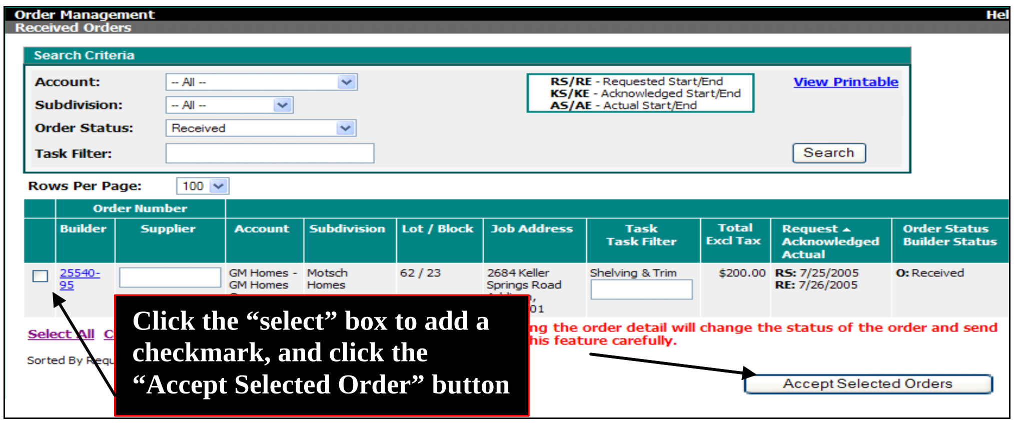


FIGURE 28. Received Orders page

To accept an order from the Order Detail page:

1. Click on the **Orders** tab. The Order Management page opens.
2. Click on **Received** in the **Orders** box or on the Left Nav Bar. The Received Orders page opens.

FIGURE 29. Received Orders page

3. Click on an **Order Number** under the **Builder** column. The Order Detail page opens on the Detail tab.

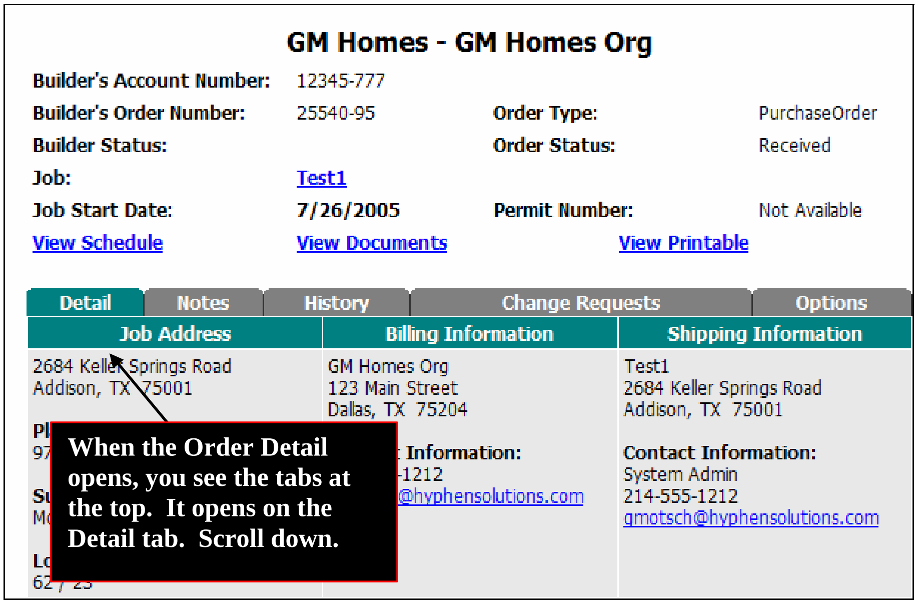


FIGURE 30. Order Detail page

4. Scroll down to the bottom of the page, and you will see the line item details and unit pricing.

5. Verify the information is correct, and then click the **Accept Order** button to accept the order and move it to the To Do list.

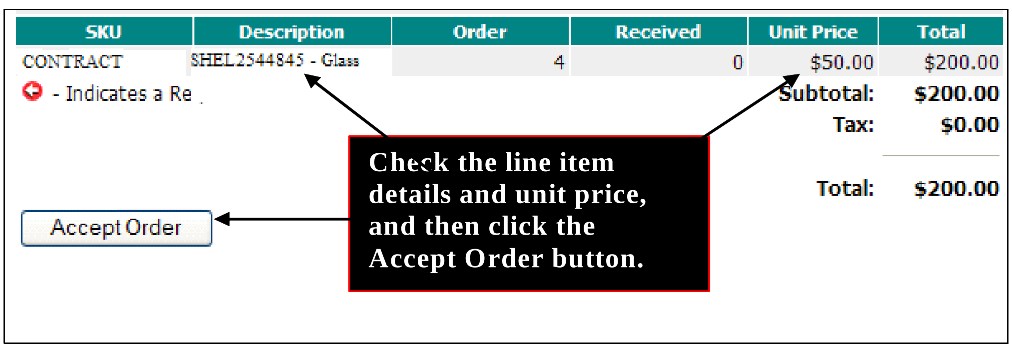


FIGURE 31. Accept order

Scenario 2: Accept Order with Date Change

If the dates are not acceptable for your company to do the work, you can request a change of the date. SupplyPro sends a reschedule alert to the builder so that he or she is quickly made aware of your request. If the builder agrees, they will reschedule the order in BuildPro, and you will receive a reschedule alert to confirm the change. There is no guarantee that the builder will accept the new date.

To request a change of date:

1. On the Received Orders page, click the **Order Number** link. The Order Detail page opens.

2. Scroll down the page until you see the **Detail** section.

3. Click the calendar next to **Acknowledged Start Date** and choose a new date. The end date automatically changes based on the duration.

4. Enter a **Note** explaining the change request.

5. Click the **Accept Order** button to send the request to the builder and move the order from Received to To Do.

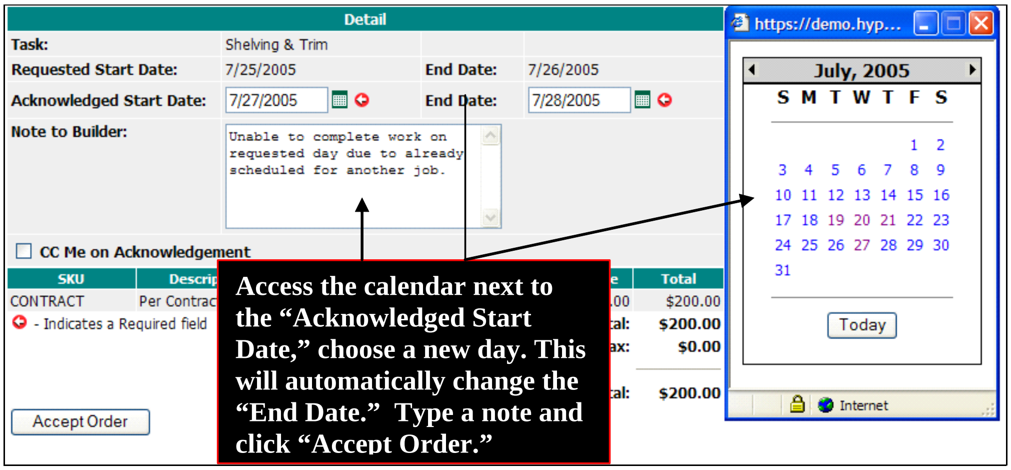


FIGURE 32. Request to change task date

Submit a Change Order Request

Users can submit a change order request for Received and To Do Orders from the Order Detail page. When a user submits a change order request, an email is sent to the builder's purchasing contact, and a copy of the email is sent to the supplier's email address. The change order request appears on the Notes tab of the Order Detail page in SupplyPro.

If the builder's purchasing department agrees with supplier's change order request, the builder's back-office system will send a change order to BuildPro. When the order information in BuildPro is updated, a change order will be sent to SupplyPro. The supplier will then receive a Change Order alert.

Submitting a change order request does not accept the order or change the status of the order. When the supplier receives a change order alert from the builder, the supplier can then accept the Received order or complete the To Do order.

This functionality allows users to request change orders for corrections to an order's:

- SKU
- Description
- Quantity
- Unit Price

To submit a change order request:

1. Click the **Orders** tab. The Order Management page opens.

2. Click the **Received** or **To Do** link under **Orders** on the Left Nav Bar. The Order List page opens, filtered by either Received or To Do orders.

3. Click on the **Order Number** of the order for which you want to submit a change order request. The Order Detail page opens.

4. Scroll down to the bottom of the page. Choose **Change Order Request** from the **Select an action** drop-down list.

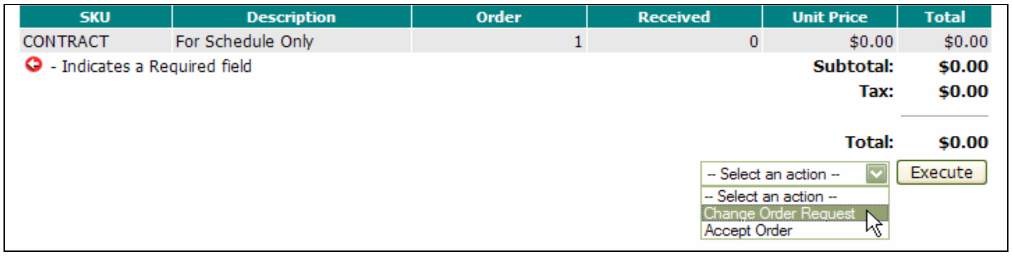


FIGURE 33. Order Detail page - change order request

5. Click the **Execute** button. The Change Order Request page opens.

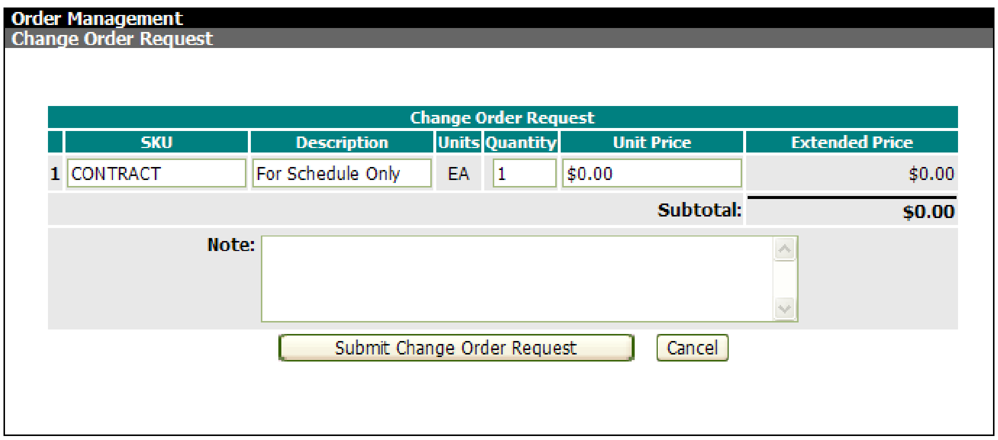


FIGURE 34. Change Order Request page

6. Change any necessary information on this page and enter a **Note** for the builder.

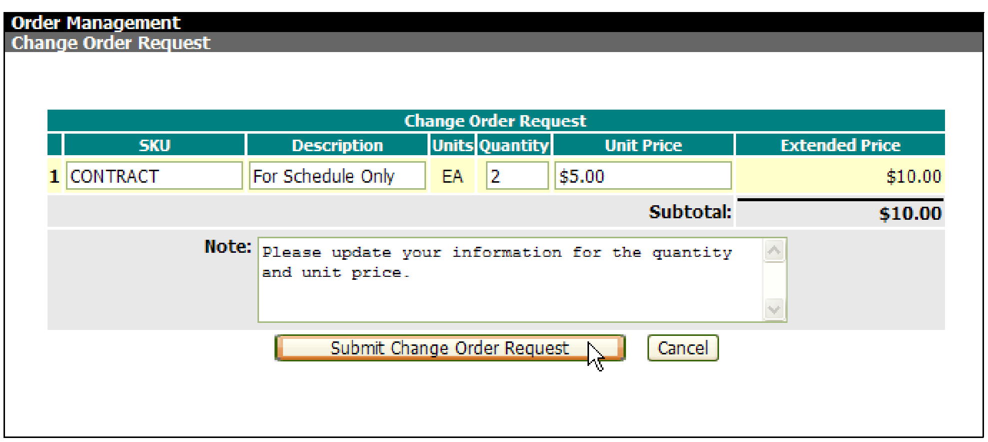


FIGURE 35. Change Order Request page

7. Click the **Submit Change Order Request** button.

8. Click **OK** on the confirmation pop-up window to submit the change order request. The change order request is sent to the builder's purchasing department at the email address entered on the builder's Account Detail page in SupplyPro.
Note: Submitting a change order request does not accept the order or change the status of the order. When the supplier receives a change order alert back from the builder, the supplier can then accept the Received order or complete the To Do order.

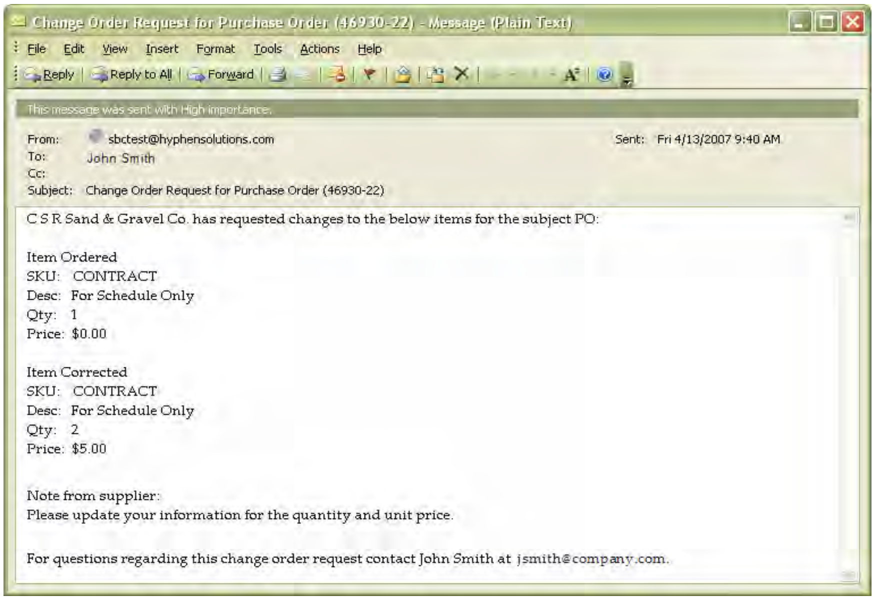


FIGURE 36. Email to builder's purchasing department

9. The change order request is recorded on the **Notes** tab of the **Order Detail** page. The change order request appears on the Notes tab even if you do not enter a note for the change order request.

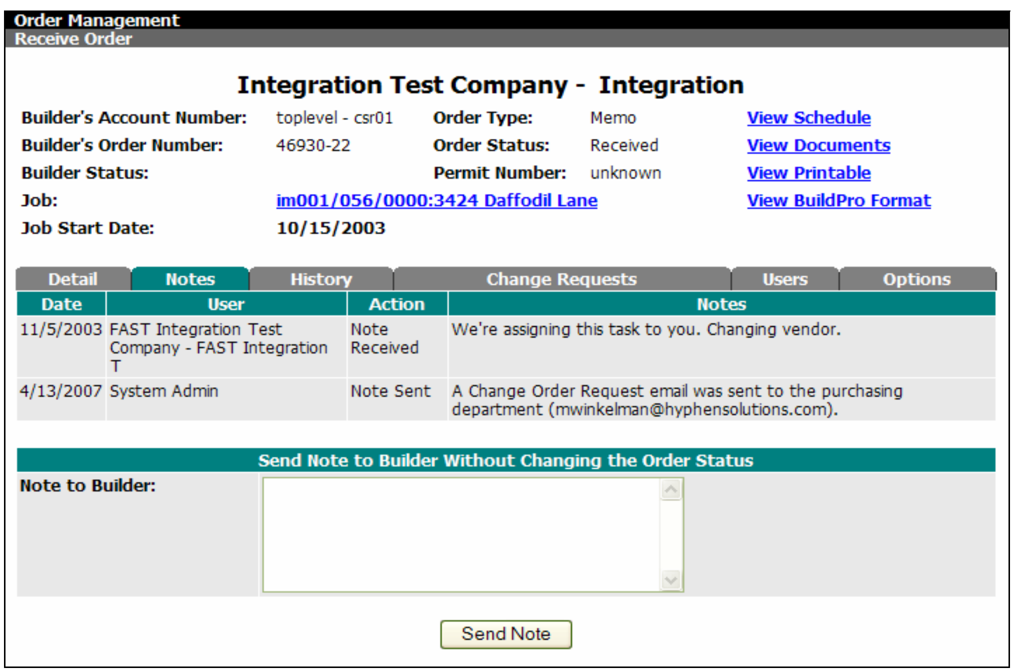


FIGURE 37. Order Detail page - Notes tab

Reschedule a To Do Order

This functionality allows users with the correct security to reschedule a To Do Order (an order that has already been accepted). The only other time users can request a reschedule is when they initially accept the order. The reschedule functionality works just like accepting the order with a different Acknowledged Start and End date.

To reschedule a To Do Order:

1. Click the **Orders** tab. The Order Management page opens.
2. Click the **To Do** link under **Orders** on the Left Nav Bar. The To Do Orders page opens.
3. Click the **Order Number** link of the To Do Order you want to reschedule. The Order Detail page opens.
4. Scroll down the page to the **Detail** section.
5. Click the calendar icon next to the **Acknowledged Start Date** field. The calendar pop-up window opens.

FIGURE 38. Calendar pop-up window

6. Click on a date to choose it as the new **Acknowledged Start Date**. Or, manually enter the date in the field. The End Date field next to field adjusts based on the task duration.

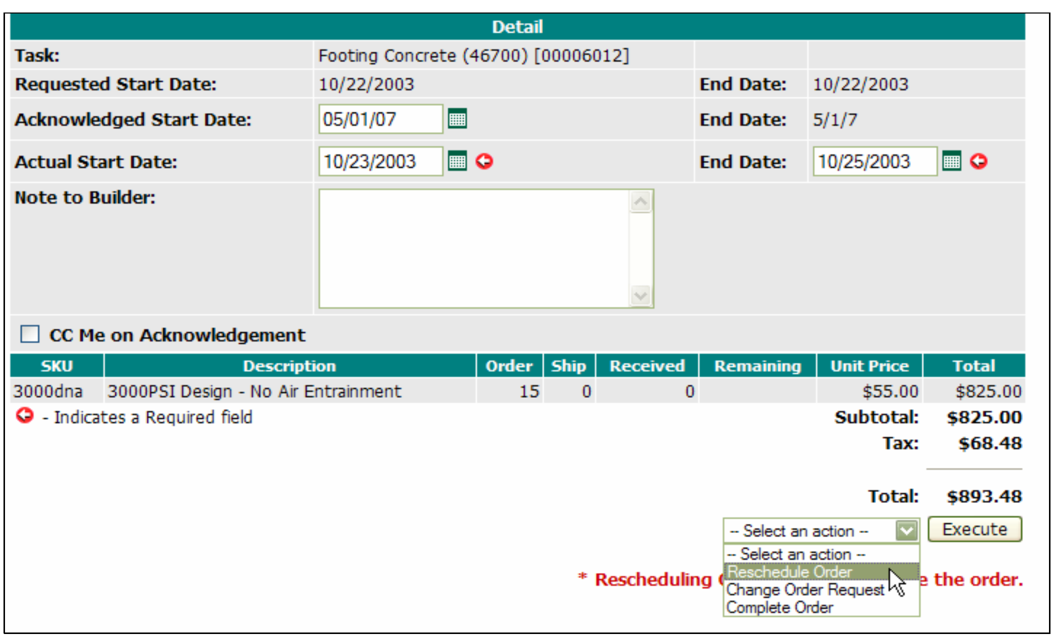


FIGURE 39. Order Detail page - reschedule To Do Order

7. Enter a **Note to Builder**, if necessary. The note will be sent to the builder with the reschedule request.

8. Choose **Reschedule Order** from the **Select an action** drop-down list in the bottom right of the page.
   Note: This option only appears on To Do Orders that have not been marked complete by the builder.

9. Click the **Execute** button. SupplyPro sends a reschedule request to BuildPro.
   Note: This does not complete the order.

Complete an Order

Completing an order from the To Do page is identical to the process you used to accept the order from the Received page. When you complete an order, SupplyPro uses the current date as the Actual End Date of the task.

To complete an order:

1. On the Order Management page or on the Left Nav Bar, click the **To Do** link. The To Do Orders page opens.

2. Click the check box to the left of the order you want to complete.

3. Click the **Complete Selected Orders** button to move the order out of To Do and into the Pending Approval status. This also sends an alert to the builder letting him or her know that the task is finished and ready for sign off.

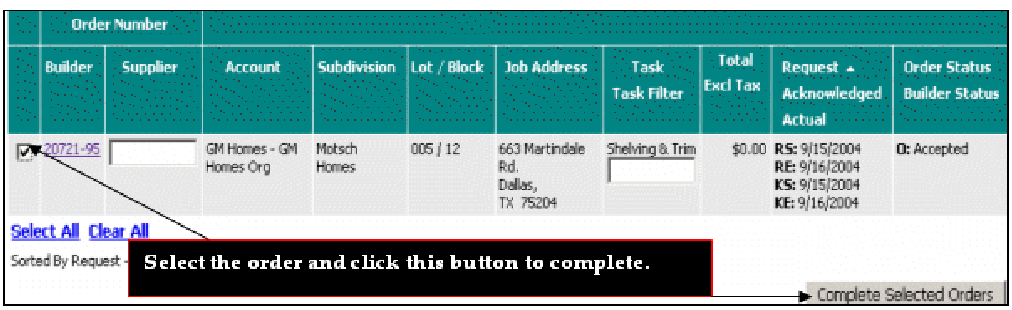


FIGURE 40. To Do Orders page

Undo Completions

The undo completion functionality allows the supplier to undo an order completion if the order has not been marked complete by the builder and have the undo completion reflected in BuildPro. The shipped quantity is set back to 0, and the order status is set back to Accepted. The undo completion is recorded on the Order Detail - History tab in SupplyPro. The status of the order in BuildPro is set back to Acknowledged, and the "Order Completed by Supplier" alert in BuildPro is removed. The shipped quantity on the order in BuildPro is set back to 0.

To undo completions from the Pending Approvals page:

1. On the Order Management page or on the Left Nav Bar, click the **Pending Approval** link. The Orders Pending Approval page opens.
2. Click the check box next to each order on which you want to undo completion.
   Note: Users can only undo completions on orders that have not already been marked as Complete by the builder.

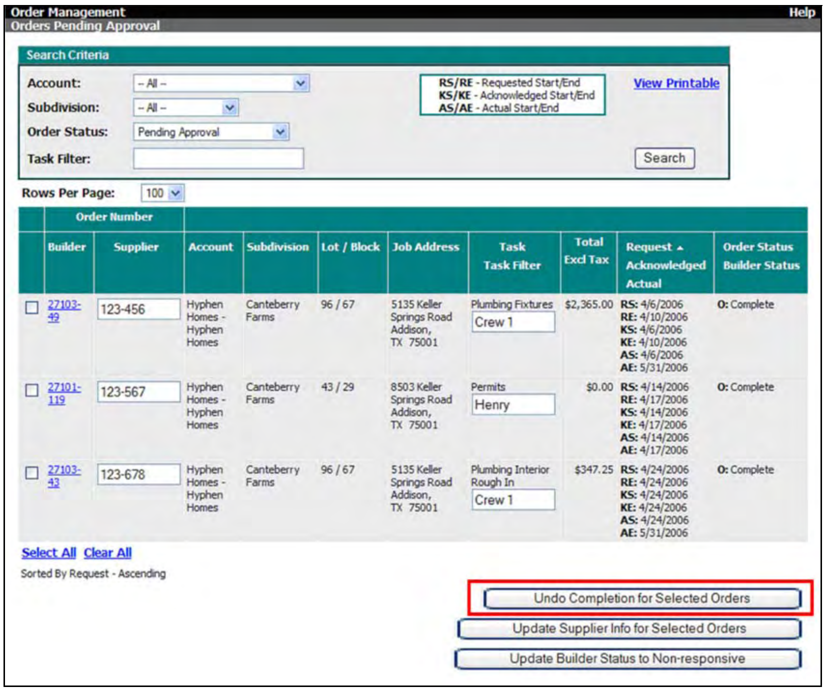


FIGURE 41. Orders Pending Approval page

3. Click the **Undo Completion for Selected Orders** button.
4. View the undo completion record on the **History** tab of the Order Detail page.

To undo completions from the Order Detail page:

1. Click on the **Orders** tab.
2. Click on the **Pending Approval** link in the Orders box or on the Left Nav Bar. The Order List opens.
3. Click on an **Order Number** link. The Order Detail page opens.

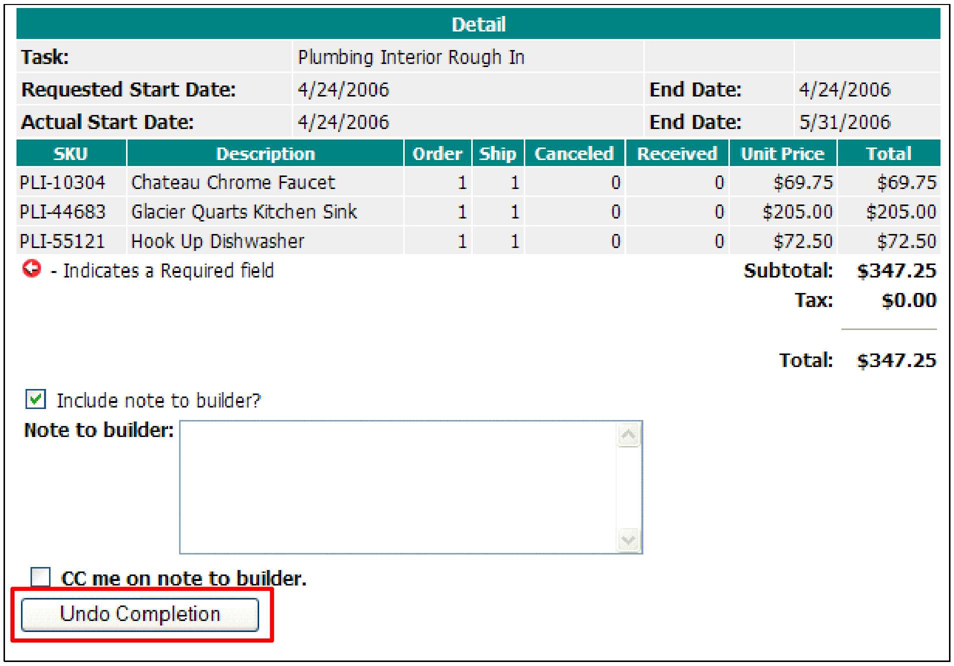


FIGURE 42. Order Detail page

4. Click the **Undo Completion** button at the bottom of the page.

5. Click the **History** tab on the Order Detail page to view the undo completion record.

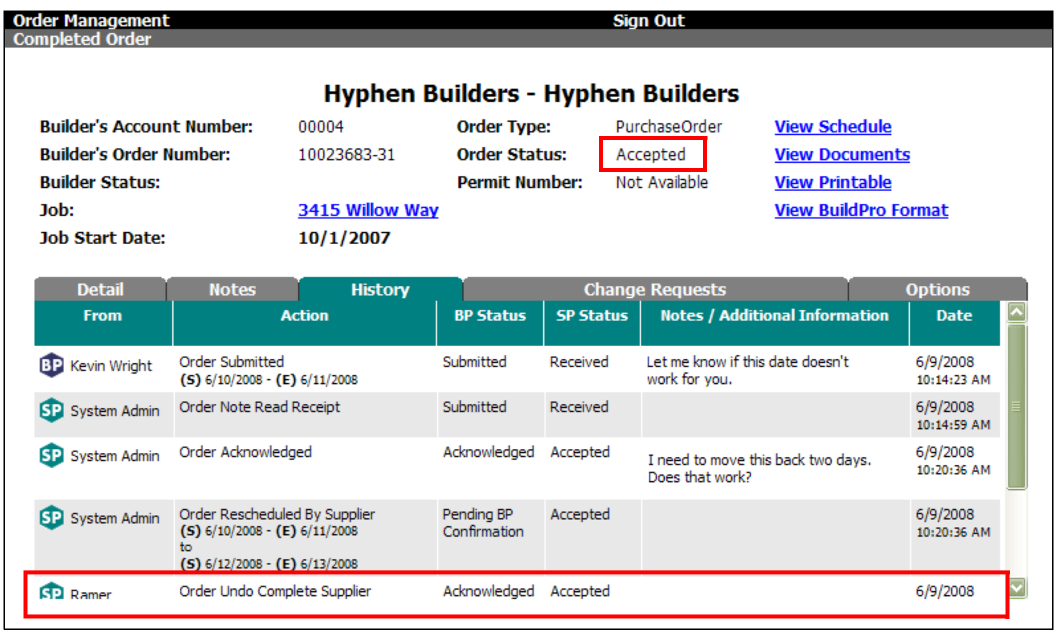


FIGURE 43. Order Detail page - History tab

Correct Actual Start and End Date

For reporting purposes, and to ensure that the builder knows when a job was actually finished, it is important to make certain that the Actual Start Date and actual End date are correct. When you complete an order from the Order Detail page, SupplyPro uses the Acknowledged End Date as the Actual End Date.

To complete an order from the Order Detail page:

1. On the To Do Orders page, click the **Order Number** link. The Order Detail page opens.
2. Verify that the end date is the date the work was actually completed. If not, type the correct date in the **Actual End Date** field.
3. Click the **Complete Order** button to move the order to the Pending Approval folder.

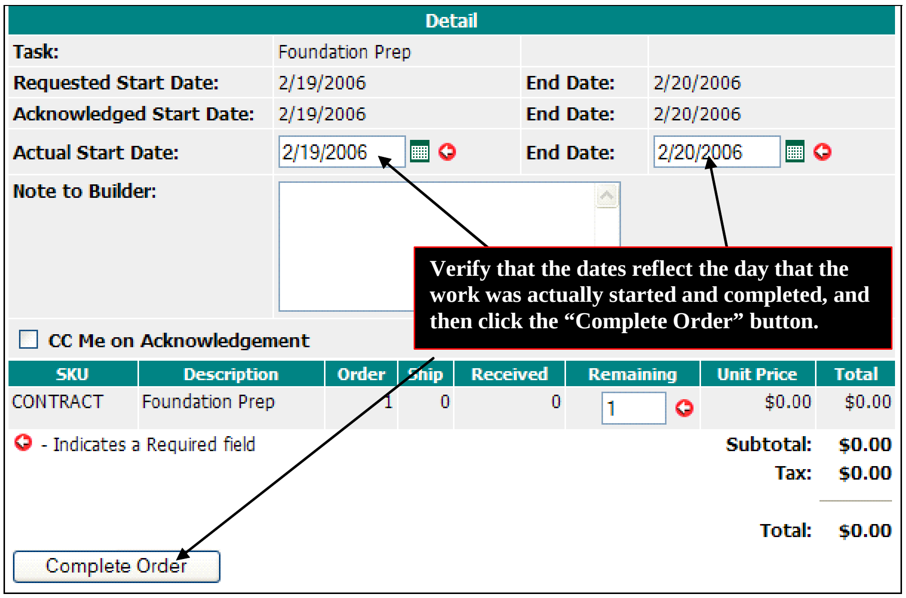


FIGURE 44. Complete order on the Order Detail page

Manual Order Entry

To get even more value from SupplyPro, you can set it up to track orders for other builders you work with that are not on BuildPro. Since there is no communication between SupplyPro and these builders, the orders need to be entered manually. The first step is to add the builder as a new account on the Account Manager tab.

Once the builder is on the Account Manager, you can manually enter their orders into the To Do list of SupplyPro by using the Manual Order Entry link located on the Orders tab.

To add a manual order:

1. On the Orders tab, click the Manual Order Entry link on the Left Nav Bar. The Manual Order Entry page opens in a new window.

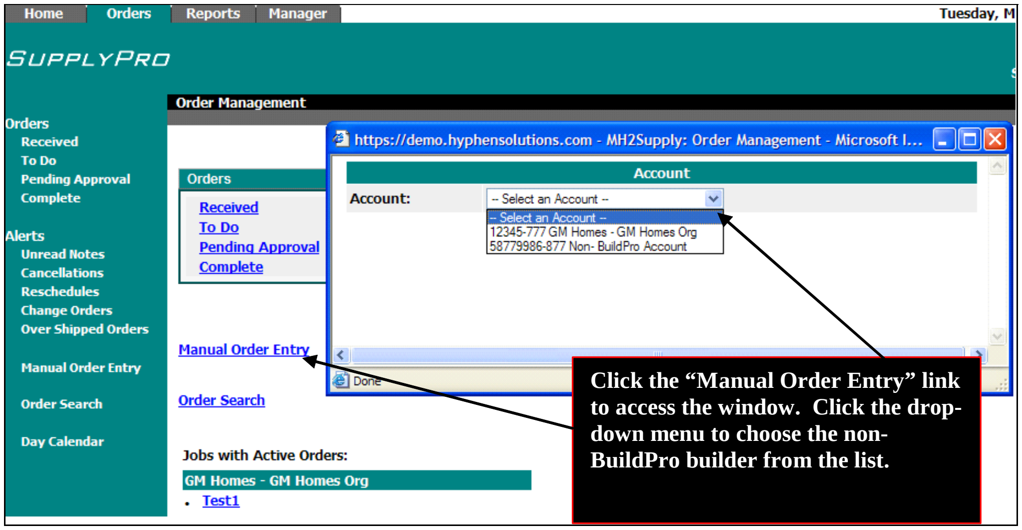


FIGURE 45. Manual Order Entry pop-up window

2. Choose a **Builder Account** from the drop-down list. The Order Detail form is displayed.

3. Enter the **Order Detail** information.
   Note: The red arrow indicates a required field.

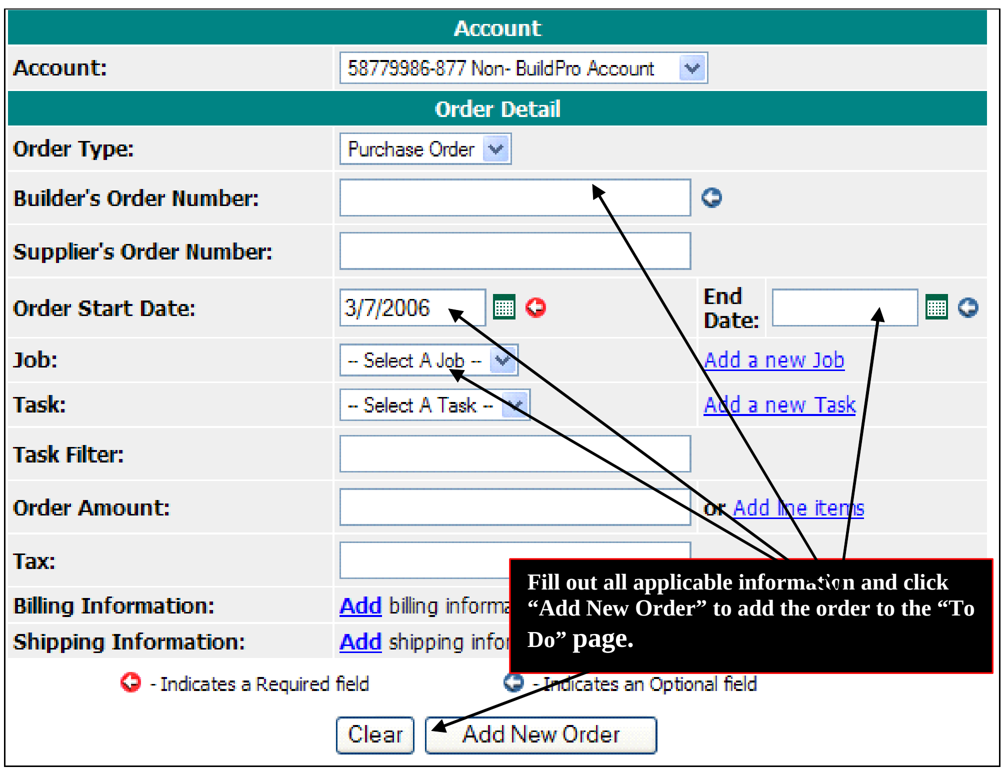


FIGURE 46. Manual Order Entry pop-up window - Order Detail form

4. Click the **Clear** button to clear the Order Detail form and start over.

5. Once you have everything filled in, click the **Add New Order** button to add the order to SupplyPro. The order will then appear on the To Do Orders page.

Process Manual Orders

Once orders are manually added to SupplyPro, they are placed on the To Do Orders page in SupplyPro. Because these orders are manually entered, and the builder does not use BuildPro, there will be no communication between you and the builder on manually entered orders. These orders become part of your schedule on the To Do Orders and are for your tracking purposes only. You will complete manually entered orders as you would any other order in the system. The order will go to the Orders Pending Approval page in SupplyPro.

Since the builder has no access to this order in the system, you will never see the "B: Complete" status in the Builder Status column of the order, and it will never automatically move to the Complete section of SupplyPro.

Once you are paid on a manual order order by a non-BuildPro Builder, follow the steps below to finish processing the manual order.

To process a manual order:

1. On the Orders tab, click the **Pending Approval** link on the Left Nav Bar. The Orders Pending Approval page opens.
2. Find the manually entered order. Click the check box next to the left of the order.

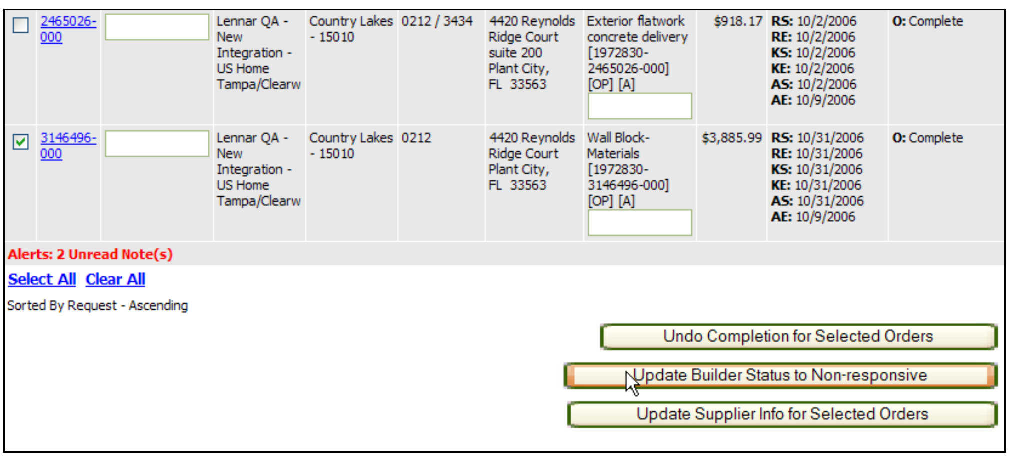


FIGURE 47. Process manual orders

3. Click the button at the bottom of the screen that says **Update Builder Status to Non-Responsive**. This will push the order to the Complete section of SupplyPro.

Assign Orders

The Assign Orders module is an optional feature in SupplyPro. From the Assign Orders page, you can perform the following tasks:

- Assign orders
- Remove assigned users from an order

Unless your company has specifically implemented it, you will not have access to the Assign Orders page or have the ability to assign individual users to an order beyond assigning an account to a user. Call your Hyphen Solutions, Ltd., Customer Care Representative or Account Manager for assistance with implementing this feature at your company.

Use the Search Criteria section to filter the information that appears on the Assign Orders page. A user must be assigned to an account before you can assign orders to the user. Orders are sorted in ascending order by request date. Orders must be assigned to a user before they will appear on the To Do orders list.

To assign orders:

1. From the **Orders** tab, click on the **Assign Orders** link on the Order Management page or on the Left Nav Bar. The Assign Orders page opens.
2. Choose an **Account** from the drop-down list.
   Note: The number in parentheses after each account shows the number of unassigned orders for that account. Only active accounts appear in the drop-down list.
3. Choose from any of the other filters. (Optional)
   Note: If you choose a specific Subdivision, you can also filter the orders by Job Address.
4. Choose **Unassigned** from the **Assign View** filter.
   Note: The Assign View field default value is Unassigned. You can click this field and change the value to Assigned if you want to see a list of all Assigned orders.
5. Click the **Run Report** button. A list of all unassigned orders appears, based on your criteria. Click on a column heading to sort the list by that heading.
6. From the **Assign Users** field in the Search Criteria, click the name of the **User** to which you want to assign orders.
   Note: If you want to assign multiple users to an order, hold the CTRL key down while you click each user name.
7. Click the check box next to each order you want to assign to the selected user(s).
8. Click the **Update Order Assignments** button on the right side of the page.
9. To view additional information on the order, click the **Order Number** link to open the Order Detail page.

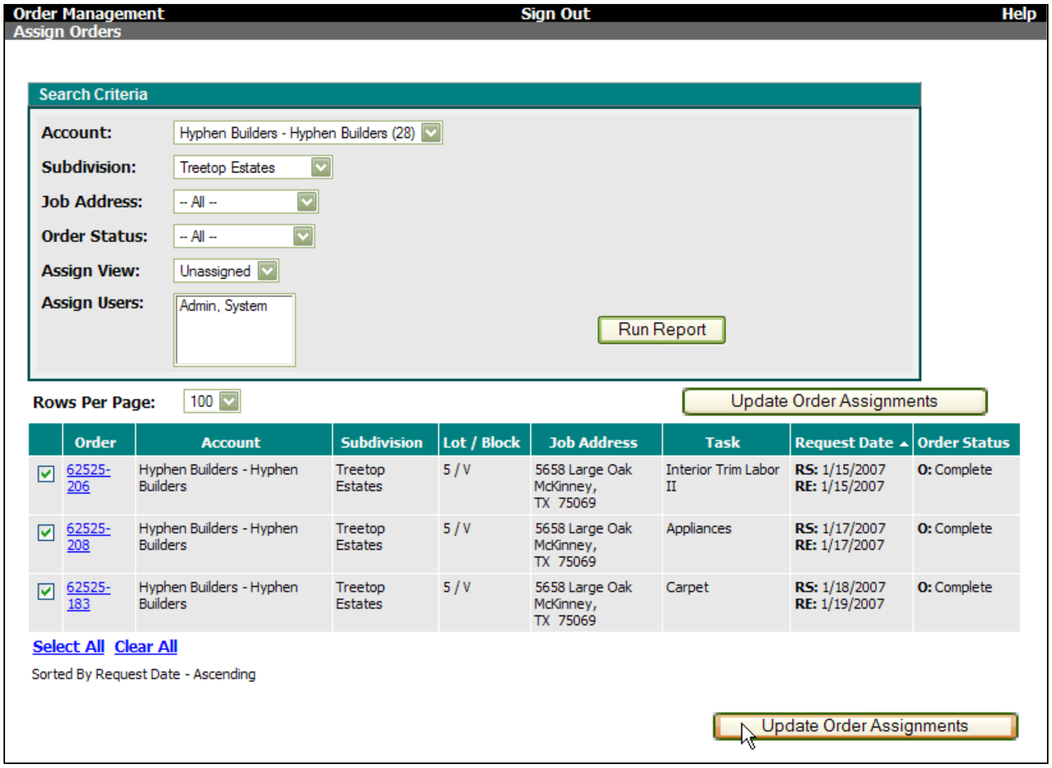


FIGURE 48. Assign Orders page

Note: When viewing assigned orders for a user, you will see the orders that are assigned to them and the orders that are not assigned to anyone.

To remove assigned users from an order:

1. On the Assign Orders page, choose **Assigned** from the **Assign View** filter.
2. Choose the user you want to view from the **Assign Users** filter.
3. Choose from any of the other filters. (Optional)
4. Click the **Run Repor**t button. A list of all assigned orders appears, based on your criteria. Click on a column heading to sort the list by that heading.
5. Click the check box to remove the check mark next to each order that you want to remove from the user.
6. Click the **Update Order Assignments** button.
7. To view additional information on the order, click the **Order Number** link to access the Order Detail page.

6 Reports Tab

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- What types of reports are available
- How to access each report
- How to generate the different reports

Overview

The Reports tab provides a series of summary and detail management reports to help you keep on top of current activity, help you forecast your materials or scheduling needs, or to analyze your productivity in the past.

These reports are divided into four types.

- Current Activity Reports
- Forecasting Reports
- Historical Reports
- Other Reports

To open a report, click any of the links on the Reports tab. Each report contains a View Prinable link, so you can view and print a printer-friendly version of the report.

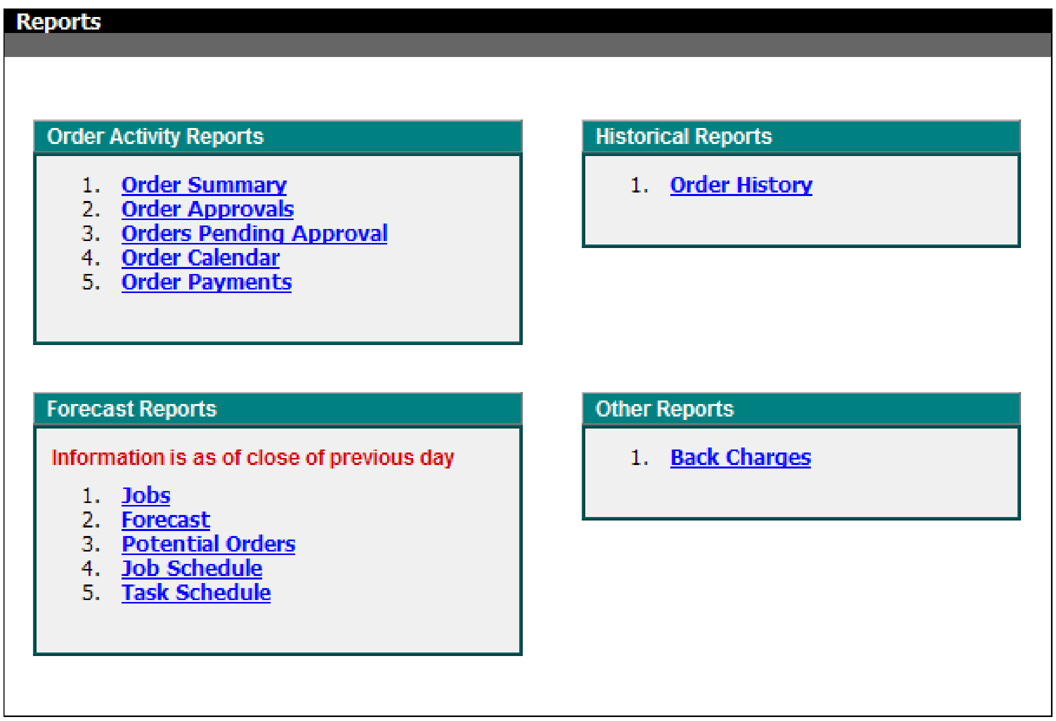


FIGURE 1. Reports tab

Order Activity Reports

Order Activity Reports provide a summary of orders for active jobs.

- Order Summary
- Order Approvals
- Orders Pending Approval
- Order Calendar
- Order Payments

Order Summary Report

The Order Summary Report lists all orders for the current month by order status and builder account. It shows the builders' job information, along with job start dates and specific task descriptions. See the screenshot below for an example.

To generate the Order Summary Report:

1. Click on the **Reports** tab. The Reports page opens.
2. Click on the **Order Summary** link from the Current Activity Reports box.
3. Choose criteria at the top of the report to display those orders you want to see, based on Account (Builder), Subdivision, Job Address, and Date Range.
4. Once you have selected the criteria you want, click the **Search** button.
5. To view the Order Detail, click the **Order Number** link.
6. To view the Job Summary, click the **Job Name** link.
7. Click the **View Printable** link to display a printable version in a new window. Use your browser's print options to send your report to the printer or to a file.

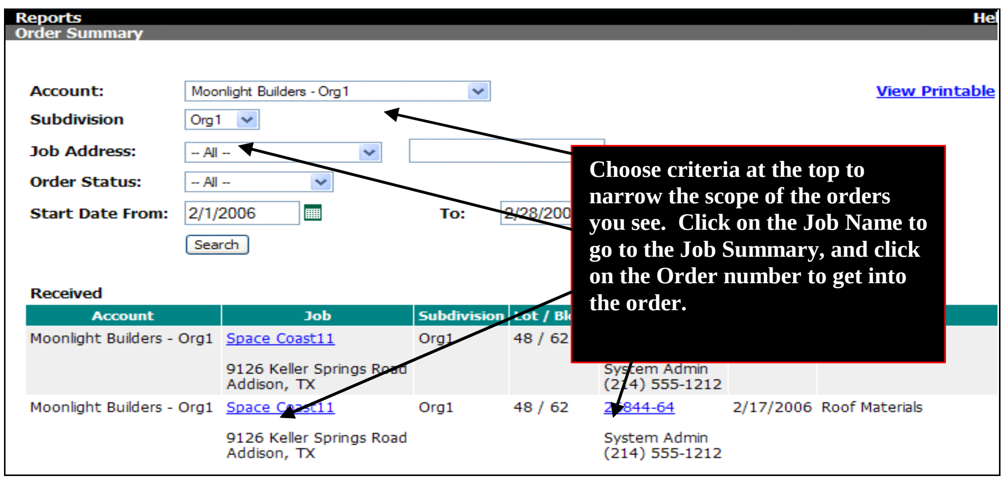


FIGURE 2. Order Summary Report

Order Approvals Report

The Order Approvals page lists all orders marked complete by the builder. This can be accessed by click on the "Order Approvals" link on the Reports tab. Just like the Order Summary Report, you can select different criteria at the top to display exactly the orders you want to see. Notice that the price is displayed with the order, and the prices are totaled together at the bottom of the report to give you an estimate of the total amount you were approved by the builder to be paid on for the date range selected.

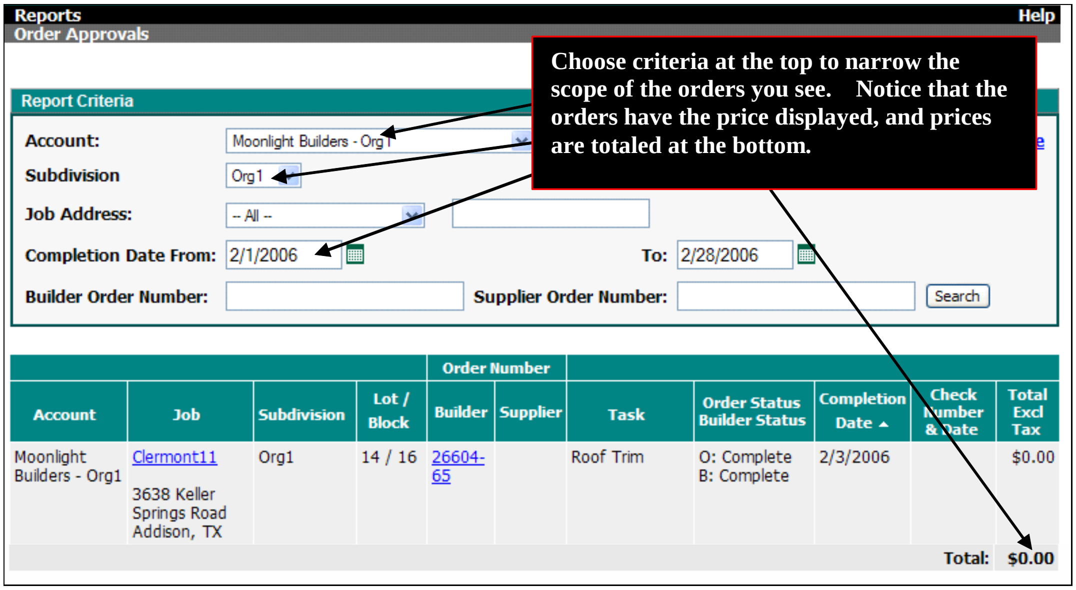


FIGURE 3. Order Approvals Report

Orders Pending Approval Report

The Orders Pending Approval page lists all orders marked complete by the supplier, but not yet marked complete by the builder. These are orders that have yet to be approved for payment.

This report functions exactly like the Orders Summary and Order Approvals Reports. The criteria at the top can be used to filter out what you don't want to see, and only view what you ask for, such as Account (Builder), Subdivision, date range etc. You also can click on the Job Name hyperlink to get to the Job Summary, and the Order Number hyperlink to go into the Order Detail.

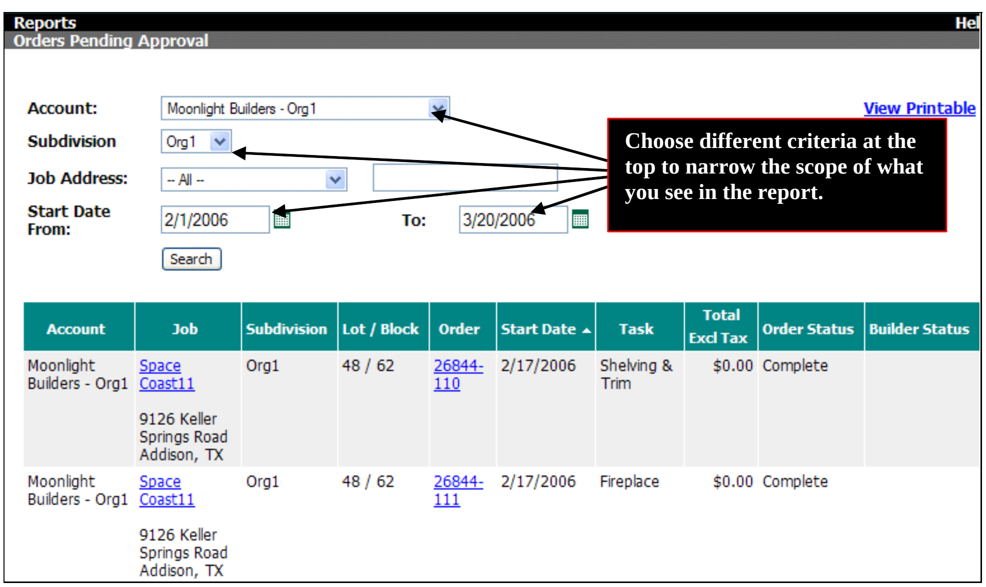


FIGURE 4. Orders Pending Approval Report

Order Calendar Report

The Order Calendar page provides a convenient calendar view of scheduled orders by start date, including job address, lot and block information, the builder's order number, task name, supplier order number and task filter. Report views include weekly, biweekly, monthly or 6 month. To access this report, click on "Order Calendar" on the Reports tab.

You can filter the calendar to show received orders, potential orders, to do orders, and all orders (the default) as well as by account and task filter. You may also specify a Start Date for the calendar. Orders with a (P) next to the task name are Potential Orders, while those with a (T) are To Do Orders. Orders designated with an (R) are newly Received Orders not yet accepted. A right arrow to the right of the task name indicates the task is carried over to the following week. A left arrow to the left of the task name indicates the task was started in the previous week.

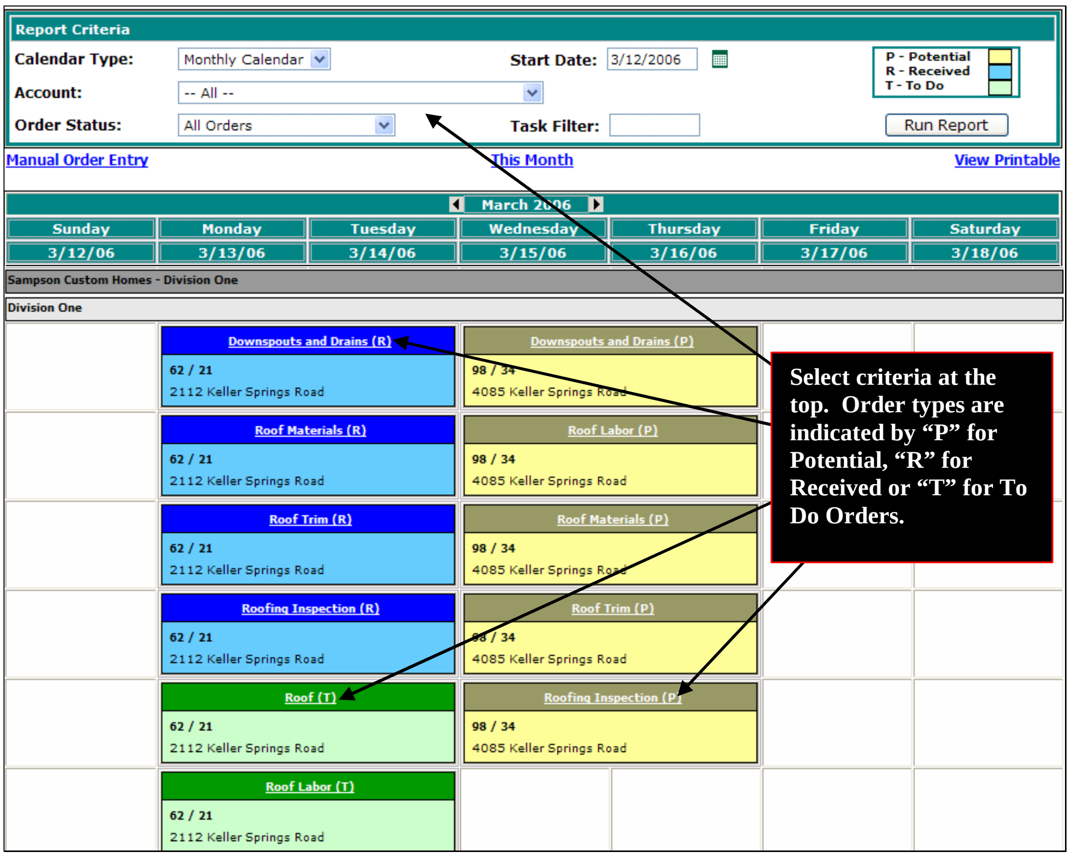
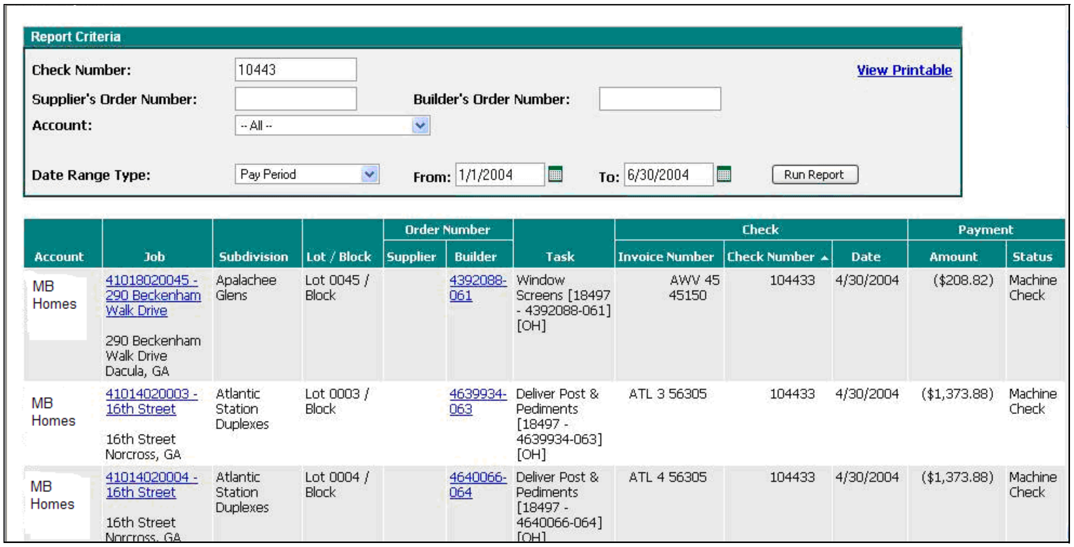


FIGURE 5. Order Calendar Report

Order Payments Report

The Order Payments Report shows payment information received from the builder's back office system, if that system is integrated with BuildPro and the builder grants permission to Hyphen to gather the data. To access this report, click on “Order Payments” on the Reports tab.

Using the criteria at the top, the report can be filtered to show only the builder and date range etc. that you choose. The default report view is organized by account, job and check information. The report page shows the builder account and job information, along with order information, task description, builder invoice number, check number, check date, check amount, and how the check was generated.


Report Criteria

Check Number: 10443 | View Printable

Supplier's Order Number: | Builder's Order Number:

Account: -- All --

Date Range Type: Pay Period | From: 1/1/2004 | To: 6/30/2004 | Run Report

				Order Number			Check			Payment	
Account	Job	Subdivision	Lot / Block	Supplier	Builder	Task	Invoice Number	Check Number ▲	Date	Amount	Status
MB Homes	41018020045 - 290 Beckenham Walk Drive 290 Beckenham Walk Drive Dacula, GA	Apalachee Glens	Lot 0045 / Block		4392088-061	Window Screens [18497 - 4392088-061] [OH]	AWV 45 45150	104433	4/30/2004	($208.82)	Machine Check
MB Homes	41014020003 - 16th Street 16th Street Norcross, GA	Atlantic Station Duplexes	Lot 0003 / Block		4639934-063	Deliver Post & Pediments [18497 - 4639934-063] [OH]	ATL 3 56305	104433	4/30/2004	($1,373.88)	Machine Check
MB Homes	41014020004 - 16th Street 16th Street Norcross, GA	Atlantic Station Duplexes	Lot 0004 / Block		4640066-064	Deliver Post & Pediments [18497 - 4640066-064] [OH]	ATL 4 56305	104433	4/30/2004	($1,373.88)	Machine Check

FIGURE 6. Order Payments Report

Forecasting Reports

Forecasting Reports predict future, potential orders based on information from BuildPro. These reports assist you in managing inventory to meet future demands.

- Jobs
- Forecast
- Potential Orders
- Job Schedule
- Task Schedule

Jobs Report

The Jobs Report can be used as a replacement for the Active Jobs List on the Orders tab. This report provides users a more comprehensive list of active job and allows users to filter the list.

The Jobs Report lists all jobs, showing the job start date, builder account, subdivision, job name, lot/block, plan/elevation/swing, the total dollar amount for all orders in the job. The report also the total dollar amount for all jobs on the report. The report allows the user to view all jobs and all orders. Filter the report by account, subdivision, or job start date. Click the Hide link in the top right corner of the Report Criteria box to hide the filters. Click the Show link to show the filters.

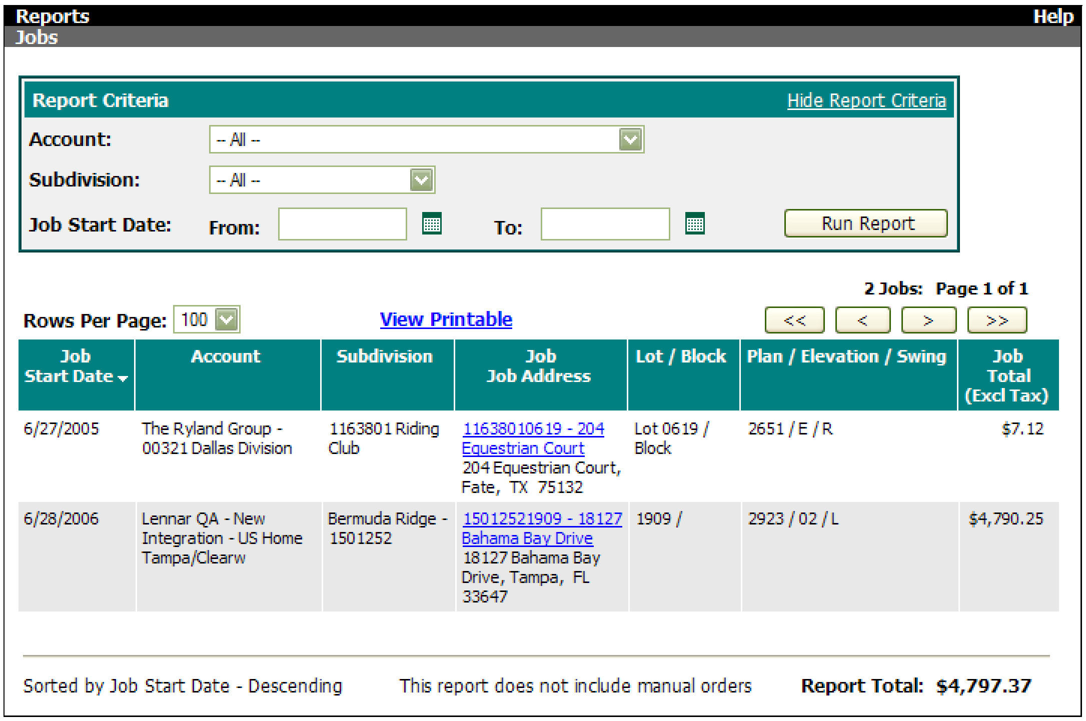


FIGURE 7. Jobs Report

Click the Job Name link to open the Job Summary report in a new window. The Job Summary report shows all orders for the selected job as well as the total dollar amount for that job. Click the Hide/Show Job Summary link to hide/show the Job Summary section. Users can navigate to the Job Summary page by clicking on the Job Name on the Jobs report, the Job Schedule report, or the Potential Orders report.

Note: Identify late tasks on the Job Summary report by the red highlighted task rows. Late tasks also display **(Late)** in red text under the Order Status. Only applies to tasks in Received or To Do status.

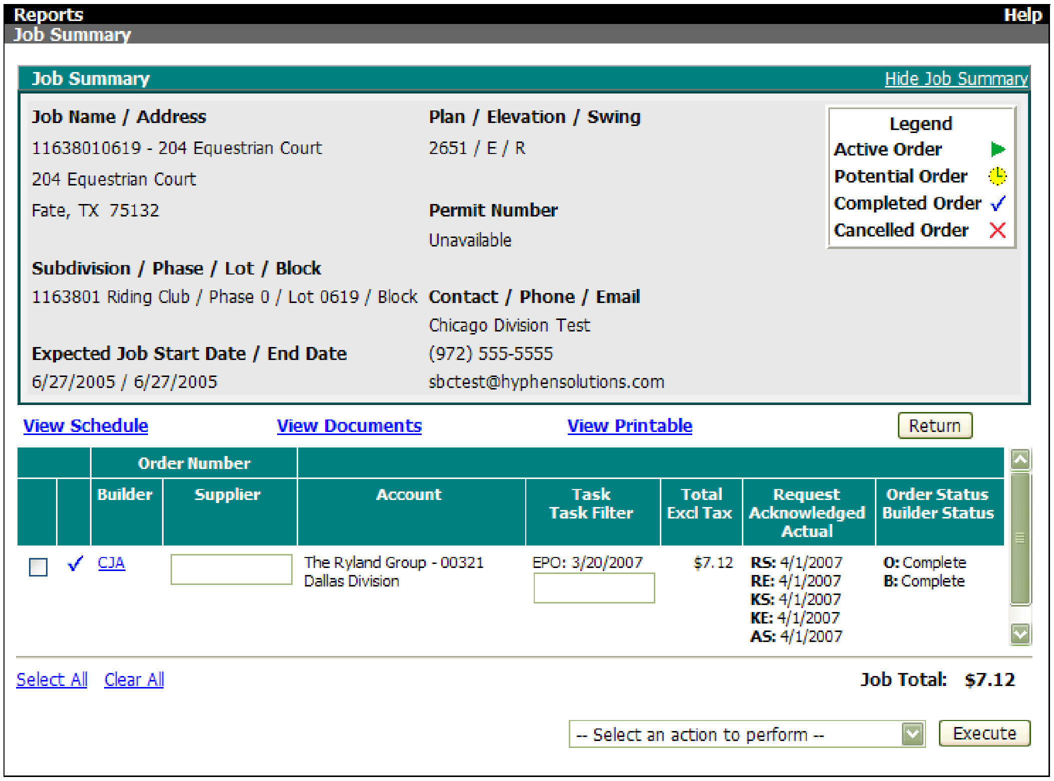


FIGURE 8. Job Summary Report

Forecast Report

The Product Order Forecast Report shows product demand, from both “real” and “potential” orders. This report shows product SKU, description, and forecast unit quantities, for the types of orders (either real or potential) that you display.

To access this report, click on the “Forecast” link from the Reports tab.

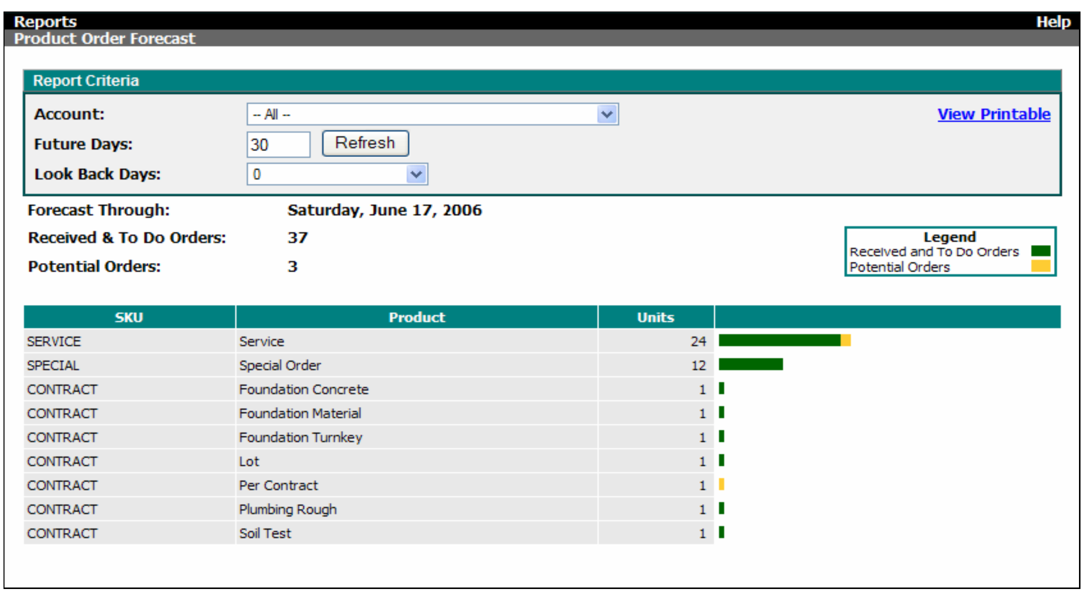


FIGURE 9. Product Order Forecast Report

Potential Orders Report

The Potential Orders Report shows planned orders in the future based on yet-to-be submitted builder orders in BuildPro. Potential Orders are for informational purposes only, and should not be used for scheduling and/or materials ordering. You should wait until the potential order becomes a "received" order before you schedule it or order materials for it. To access the Potential Orders Report, click on the "Potential Orders" link from the Reports tab. On the Potential Orders Report, click the Job Name link to open the Job Schedule, or click the Task Name link to open the Task Summary.

As before, you can use the criteria at the top of the report to choose the Account (Builder) and to establish a range in the future. The Future Days defaults to 90 days, and the maximum range is 180 days. The default report view shows orders by start date, oldest orders first. Once the report is displayed, you can click on the Job Name to access the Job Summary, or the Task Name to get into the task detail. Notice that pricing is available on this report, so that you can be proactive in identifying pricing issues before the orders become "real" orders. You can print the potential orders by selecting the check box to the left of the date, then click "Print Selected Orders" at the bottom of the page.

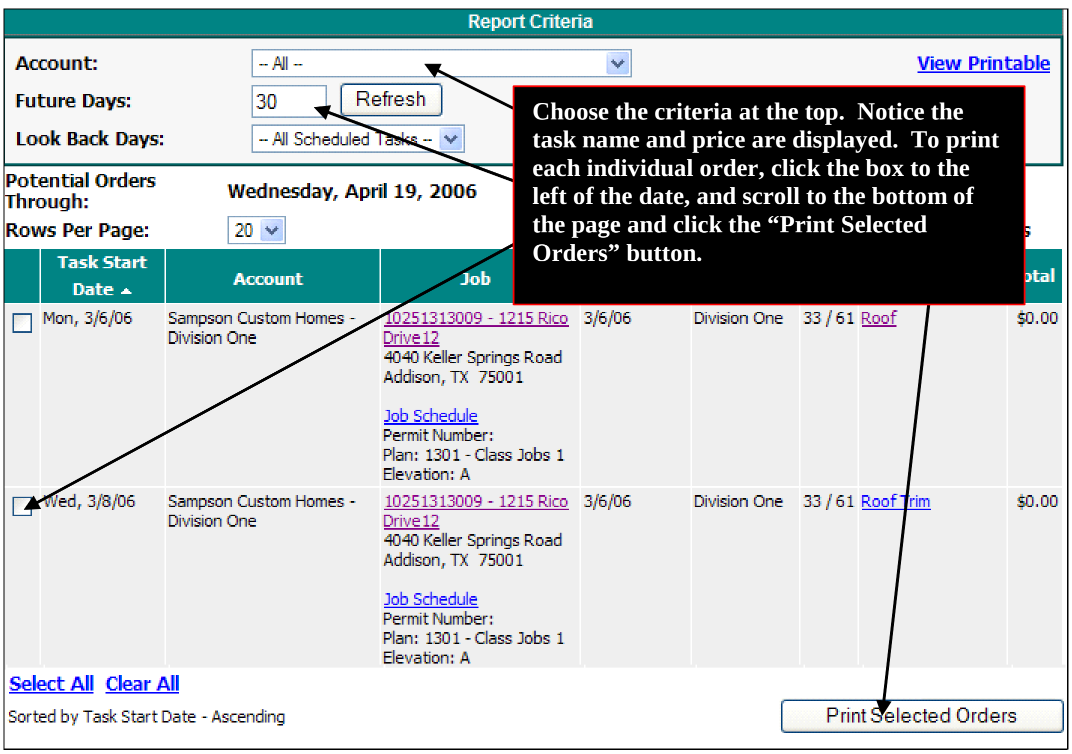


FIGURE 10. Potential Orders Report

Job Schedule Report

The Job Schedule Report shows active jobs with orders by start date, oldest jobs first. To access the report, click on "Job Schedule" from the Reports tab. You have a choice of displaying "All Jobs" or "Only Jobs with Active Orders" by selecting from the "View" drop-down menu.

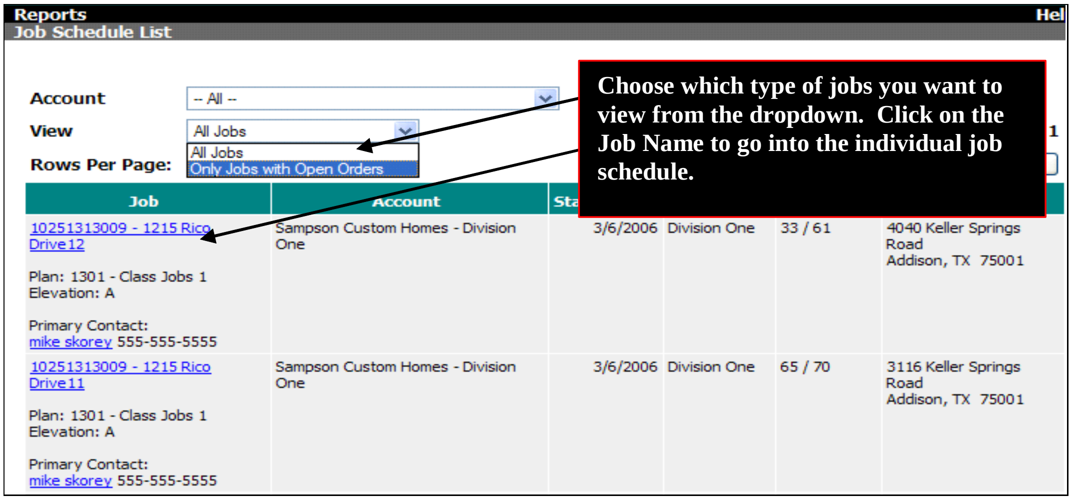


FIGURE 11. Job Schedule Report

Once in the report, you can view the actual job schedule by clicking the Job Name link. You can look at "All Tasks" or "Only Company Tasks" by selecting what you want from the "View" drop-down list. This report differs from the "View Schedule" because when you view the schedule from here, you can click into the actual task name associated with your company's tasks.

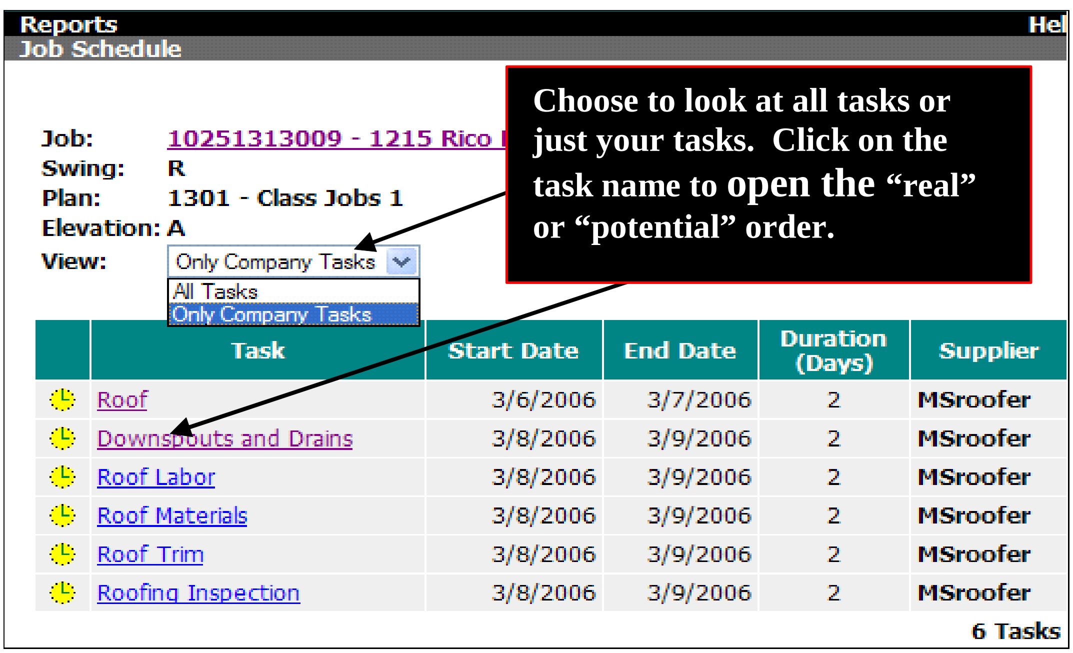


FIGURE 12. Job Schedule Detail

Task Schedule Report

The Task Schedule Report shows all current active jobs with potential orders by job start date, oldest jobs first. The report shows the complete job task schedule, including start date, end date, and associated supplier. Use the job and task links to access additional job or task information.

Again, criteria can be selected at the top to display exactly the information you want to see, such as specific builder and date ranges. By using the "Task Status" drop-down listdrop-down, you can choose to look at all tasks, scheduled tasks (Potential Orders), in progress tasks. Click the Job Name link to view the Task Summary for that task.

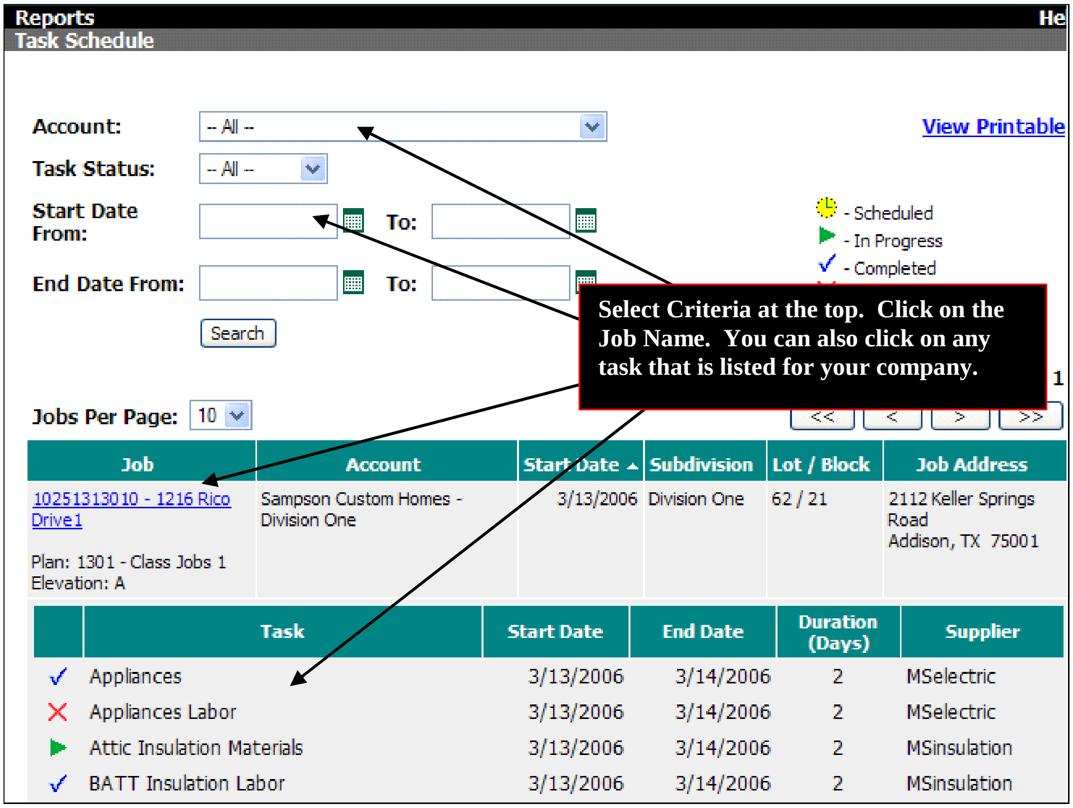


FIGURE 13. Task Schedule Report

Historical Reports

Historical Reports provide a way to see your productivity from previous months, based on orders that have been started and completed in SupplyPro.

- Order History

Order History Report

The Order History Report displays a graphical representation of order activity for all accounts for the current year by month, so you can see when activity peaked or dropped. The text portion of the report page summarizes the same data, including the number of orders and the number of items ordered and shipped each month.

It looks at the number of Orders Received (Orders), how many units of product were ordered on those orders (Items Ordered), and what was marked complete by you (Items Shipped.)

By clicking on the individual month name, you can see exactly the type of products and number of units per product that were ordered each month.

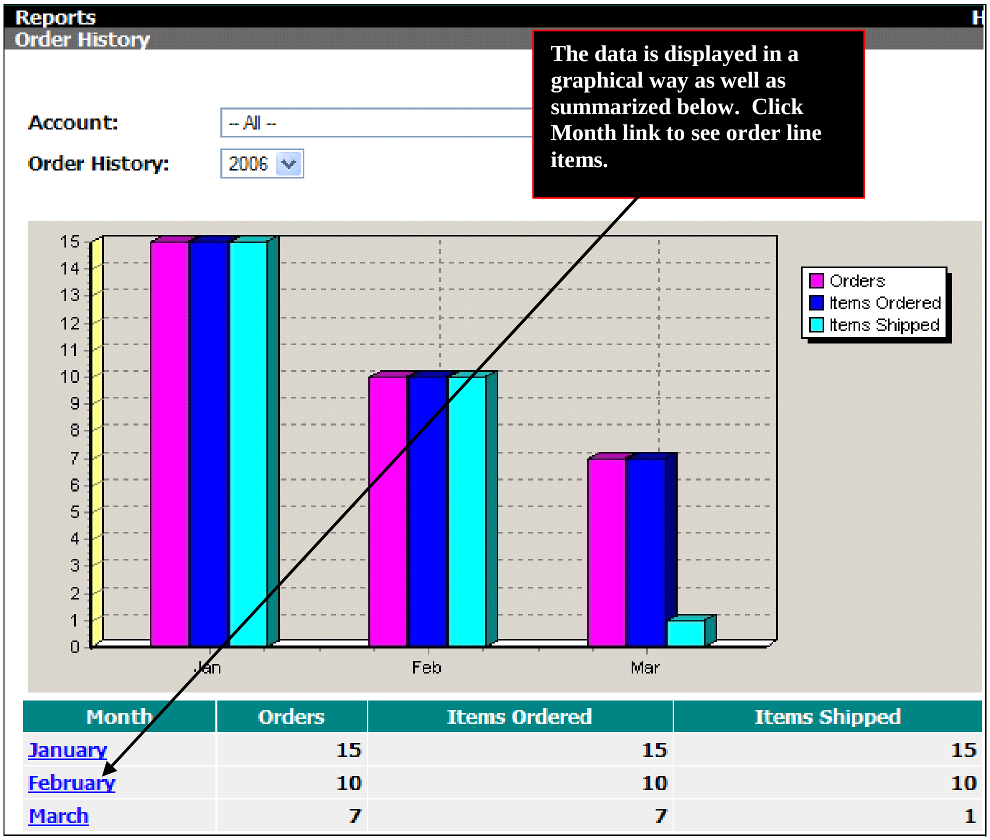


FIGURE 14. Order History Report

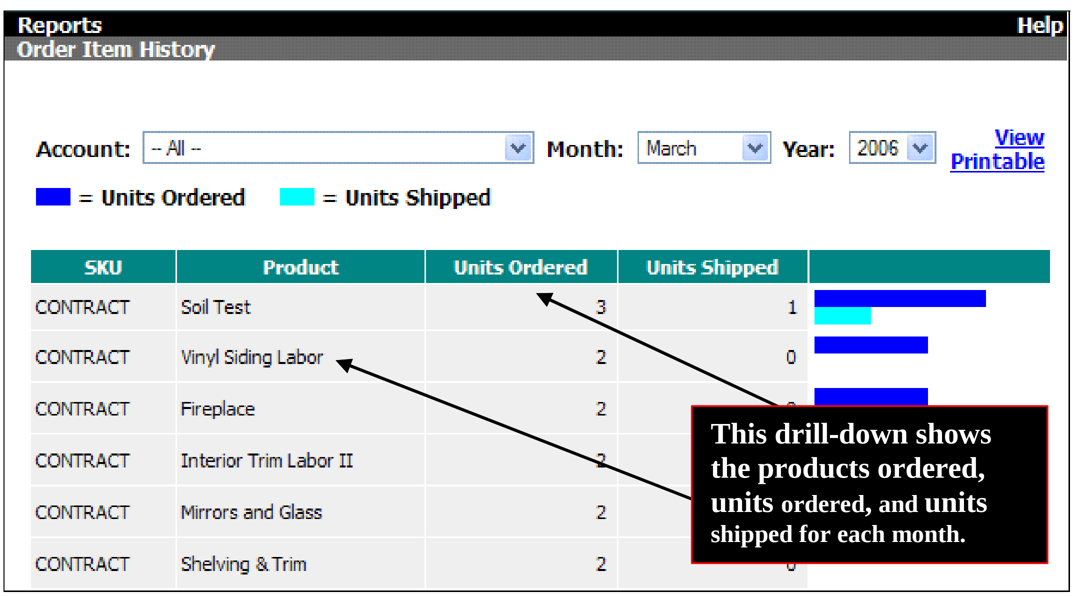


FIGURE 15. Order Item History

Other Reports

Other Reports are reports that do not fit into any of the other categories. Currently, this catgeory only has one report:

- Back Charges

Back Charges Report

View the list of back charges submitted to you by each builder. Filter the list by account, subdivision, status, and job start date.

To generate the Back Charges report:

1. Click on the **Reports** tab. The Reports page opens.
2. In the **Other Reports** box, click on the **Back Charges** link. The Back Charges report opens.
3. Choose from the **Report Criteria**.
4. Click the **Run Report** button. The list of back charges appears.

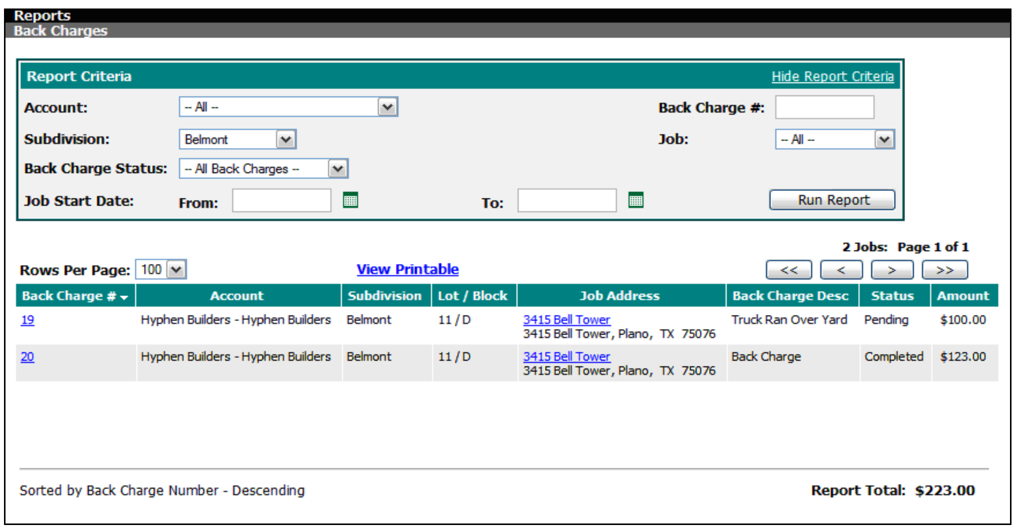


FIGURE 16. Back Charges Report

5. Click on the **Back Charge** # link to open the Back Charge Detail page on the Orders tab.

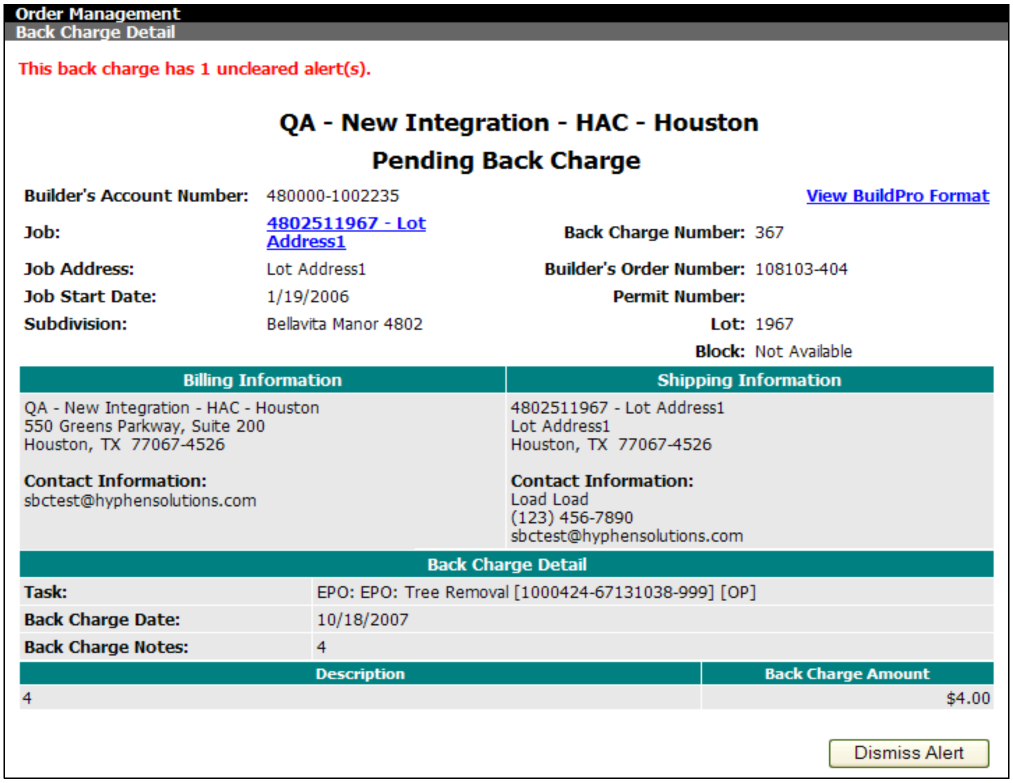


FIGURE 17. Back Charge Detail page

6. On the Back Charges Report, click on the **Job Address** link to open the Job Summary Report.
Note: In the Builder Order Number column of the Job Summary Report, back charges display the BC (Back Charge) # instead of an order number. Click on the BC # link to open the Back Charge Detail page.

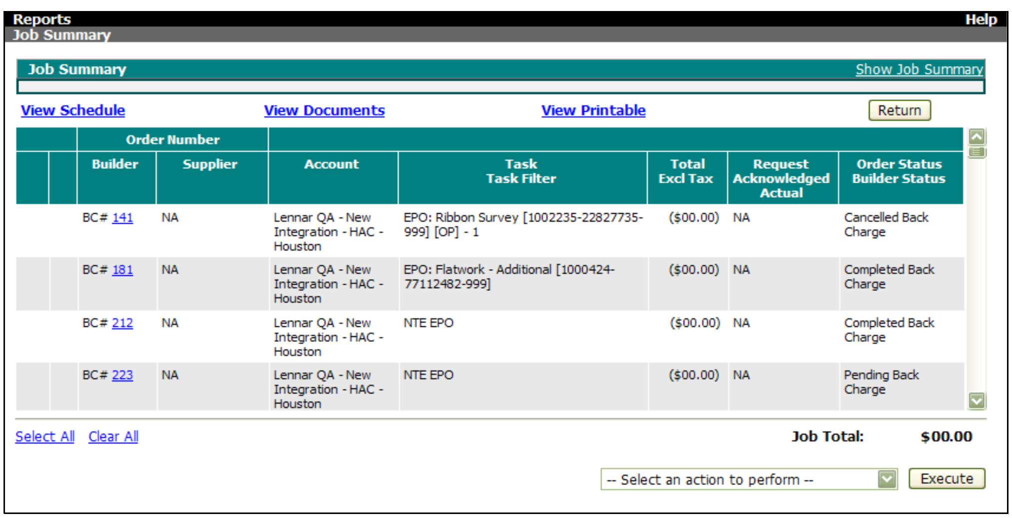


FIGURE 18. Job Summary Report

7 Manager Tab

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- The Manager Tab
- How to update the Company Profile
- How to assign Security Roles
- How to customize Security Roles
- How to update the User Information
- How to maintain the Builder list in Account Manager
- How to add/delete/change e-destinations

Overview

SupplyPro's Manager tab provides all of the functions needed to manage your company's profile, user security roles, user names, and builder accounts.

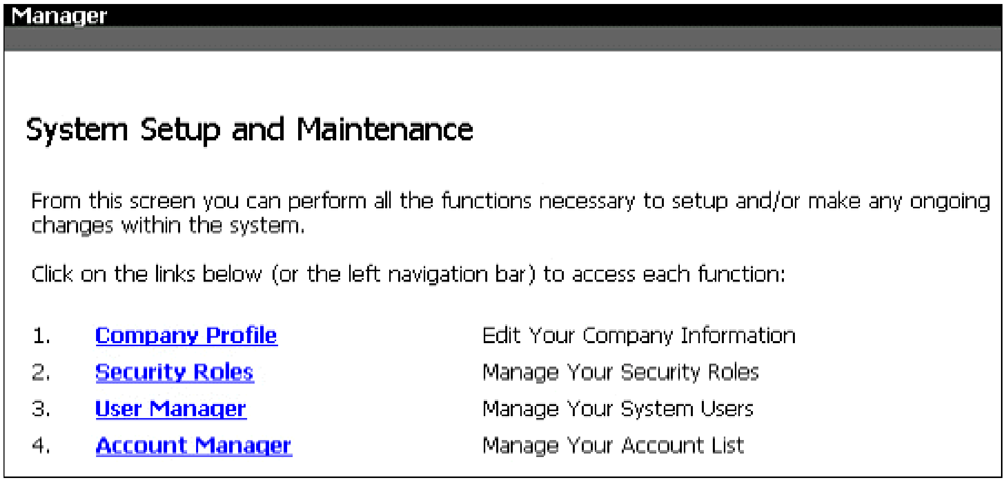


FIGURE 1. Manager tab

The Manager page has links to the following functions:

- **Company Profile** - This section lets you edit your company's contact information.
- **Security Roles** - This section lets you manage security roles for multiple SupplyPro users.
- **User Manager** - This section lets you to update your system user information and change passwords.
- **Account Manager** - This section shows your account list, and assigned users per account and allows you add new builder accounts. This is also where you manage e-destinations.

Company Profile

In the event that any of your company's information changes, such as the address, phone number, or e-mail address, you must update your company's profile. It is especially important to update the email when it changes, because this is the only email that we consider authorized to send information to, such as passwords etc.

To update your company's profile:

1. Click the **Manager** tab.
2. Click the **Company Profile** link. The Company Profile page opens on the Detail tab.

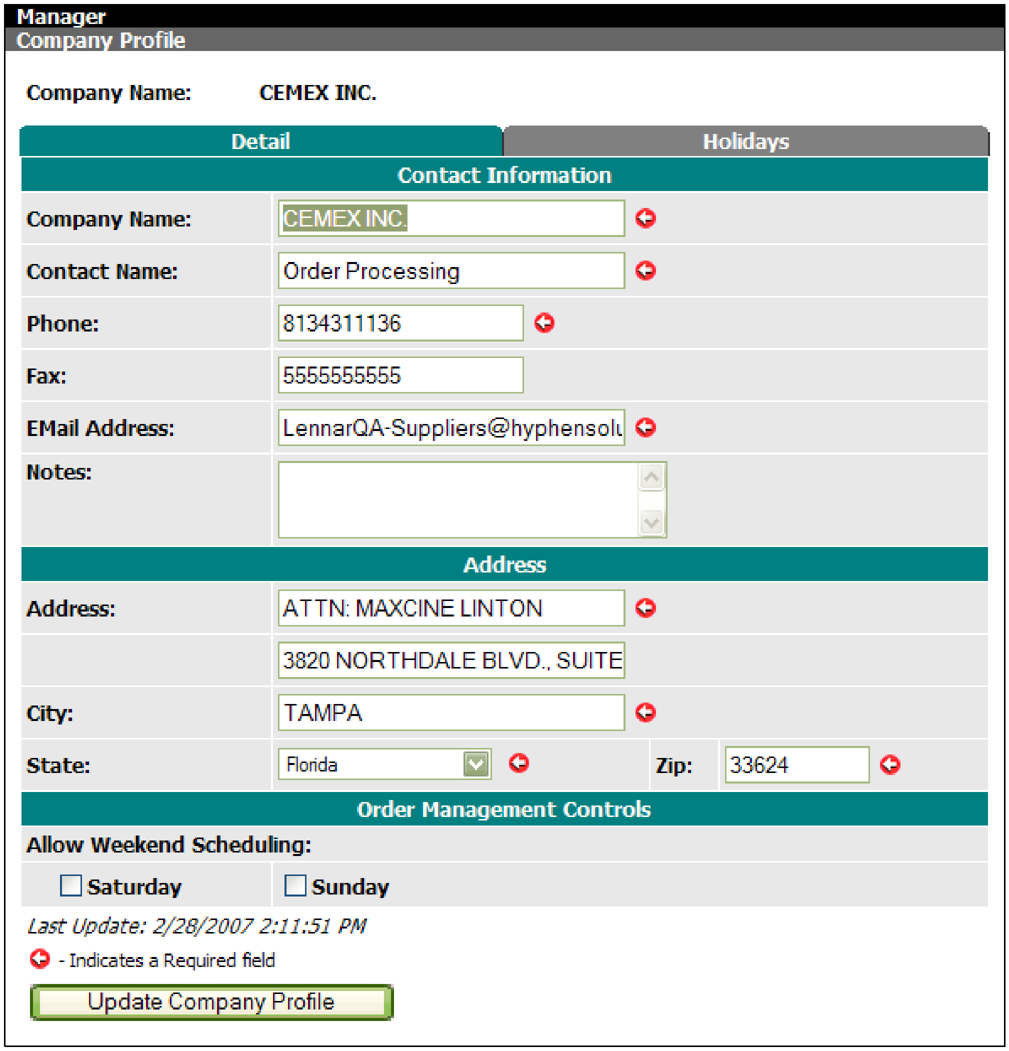


FIGURE 2. Company Profile page

3. Enter your changes in the appropriate fields.
   Note: If you change your **Company Name**, it will change the name in SupplyPro but not in BuildPro.

4. Click the **Update Company Profile** button. Your new company information is saved in SupplyPro.

View Pre-Defined Security Roles

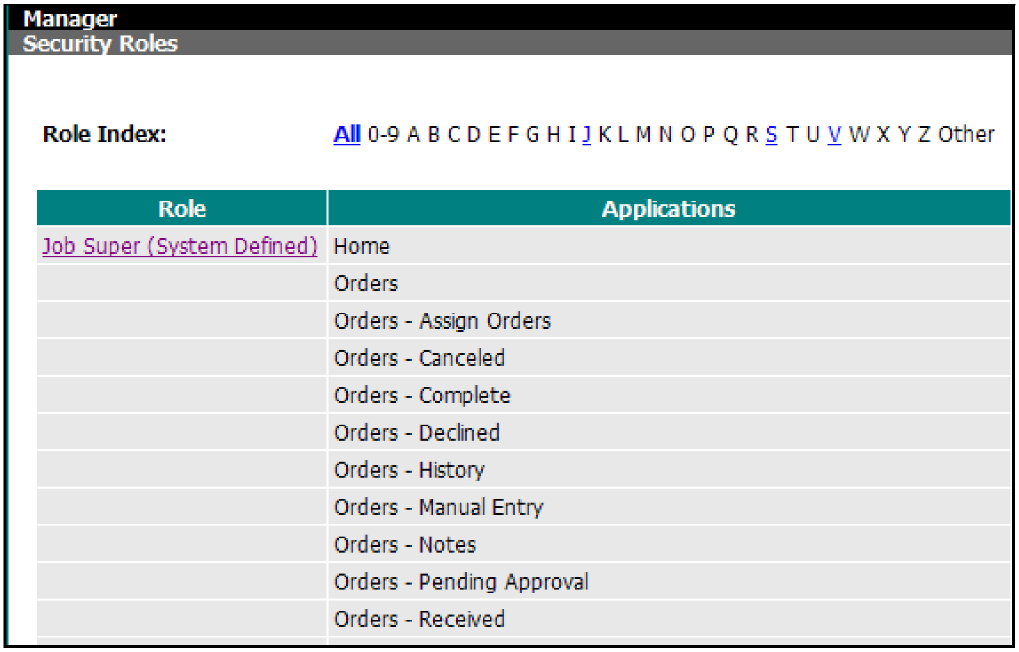
Security Roles are only applicable to those companies who have purchased multiple User IDs. If your company only has one User ID, then that User will be defaulted to the System Administrator or “SA” security role.

There are three security roles that are already defined by Hyphen Solutions:

- Job Super
- SA
- View Only

To view the security of SupplyPro each role allows:

1. Click the **Manager** tab.
2. Click the **Security Roles** link. The Security Roles page opens.



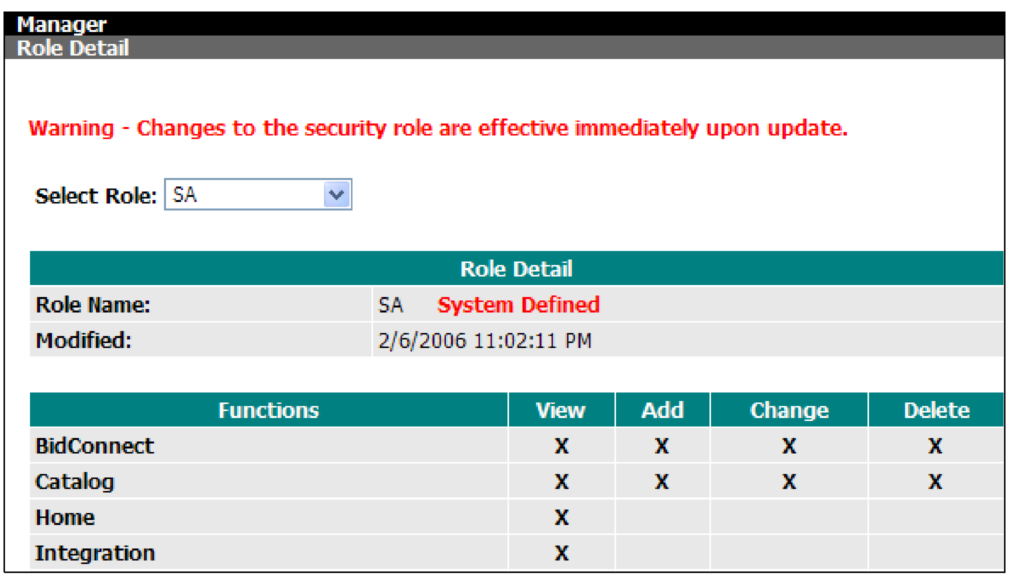
Manager
Security Roles

Role Index: All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Role	Applications
Job Super (System Defined)	Home
	Orders
	Orders - Assign Orders
	Orders - Canceled
	Orders - Complete
	Orders - Declined
	Orders - History
	Orders - Manual Entry
	Orders - Notes
	Orders - Pending Approval
	Orders - Received

FIGURE 3. Security Roles page

3. Click on the **Role** link to view the attributes (View, Add, Change, and Delete) set up for each function. The Role Detail page opens.
Note: If there is an "X" in the column, it means that the role has been assigned that attribute is active.



Manager
Role Detail

Warning - Changes to the security role are effective immediately upon update.

Select Role: SA

Role Detail	
Role Name:	SA System Defined
Modified:	2/6/2006 11:02:11 PM

Functions	View	Add	Change	Delete
BidConnect	X	X	X	X
Catalog	X	X	X	X
Home	X			
Integration	X			

FIGURE 4. Role Detail page

Create Custom Security Roles

To create customized security roles:

1. Click on the **Manager** tab.
2. Click on the **Security Roles** link.
3. Click the **Add New Security Role** button at the bottom of the page.
4. Enter a name for the new role in the **Role Name** field.
5. Click the check boxes for **View**, **Add**, **Change**, or **Delete** next to each **Function** to assign those attributes to the role.
   Note: Each function can one or more of the attributes. So, you could have the View and Change attributes on the Assign Orders function.
6. Click the **Add New Security Role** button at the bottom of the page.

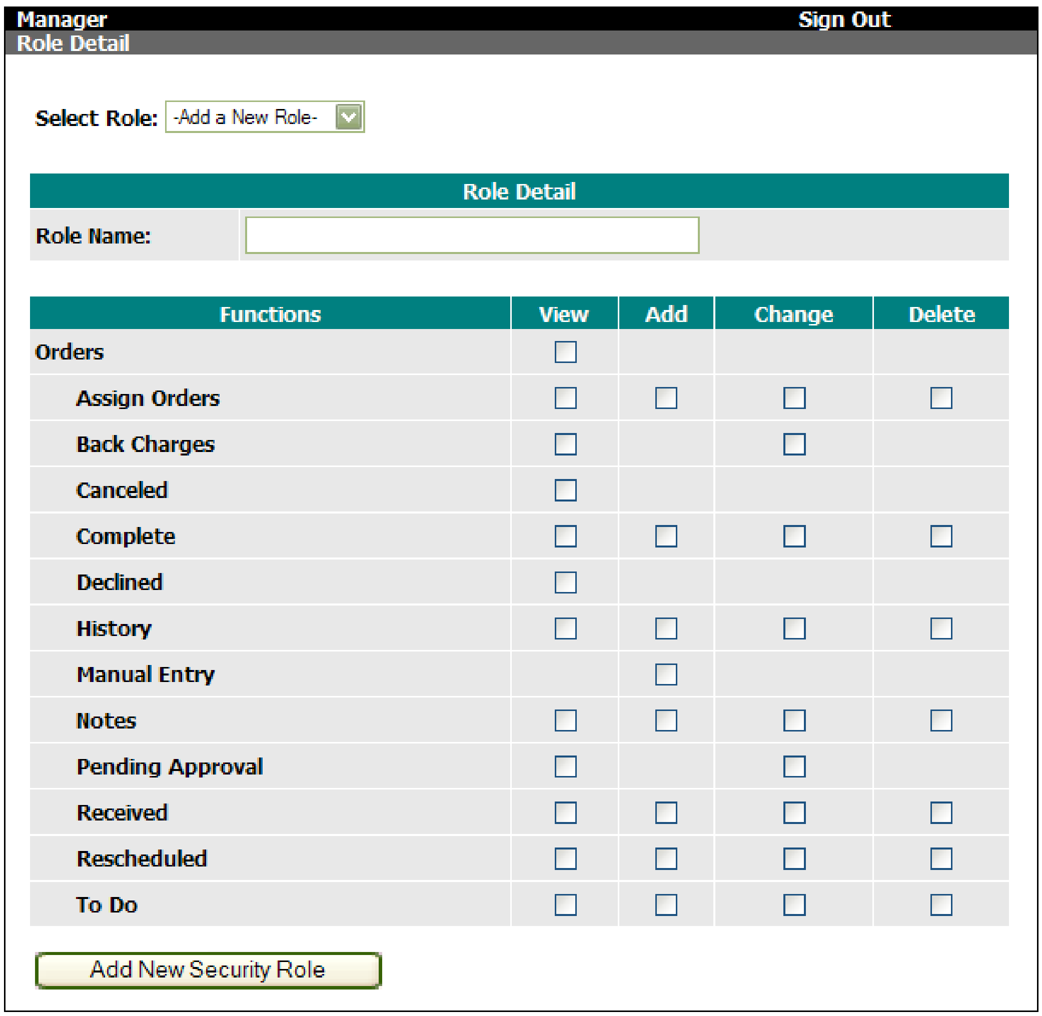


FIGURE 5. Role Detail page

User Manager

The User Manager allows you to change the password and other information, assign different security roles, or assign different accounts to the user.

To change your user name, password, or contact information:

1. Click the **Manager** tab.
2. Click the **User Manager** link. The User Manager page opens.
3. Click on a **User Name** link. The User Detail page opens on the User Detail tab.

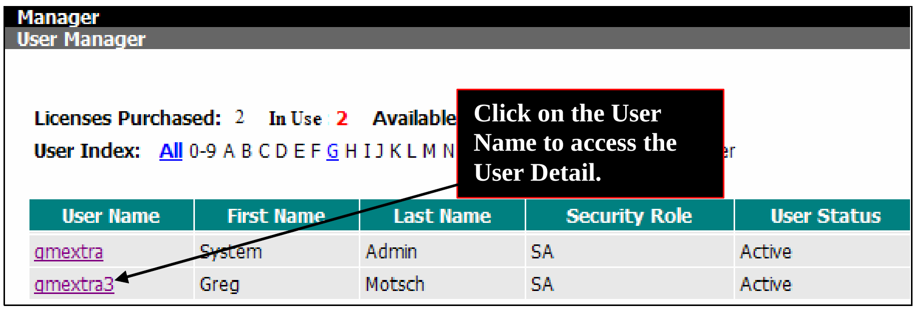


FIGURE 6. User Manager page

4. Make any necessary changes to the fields.

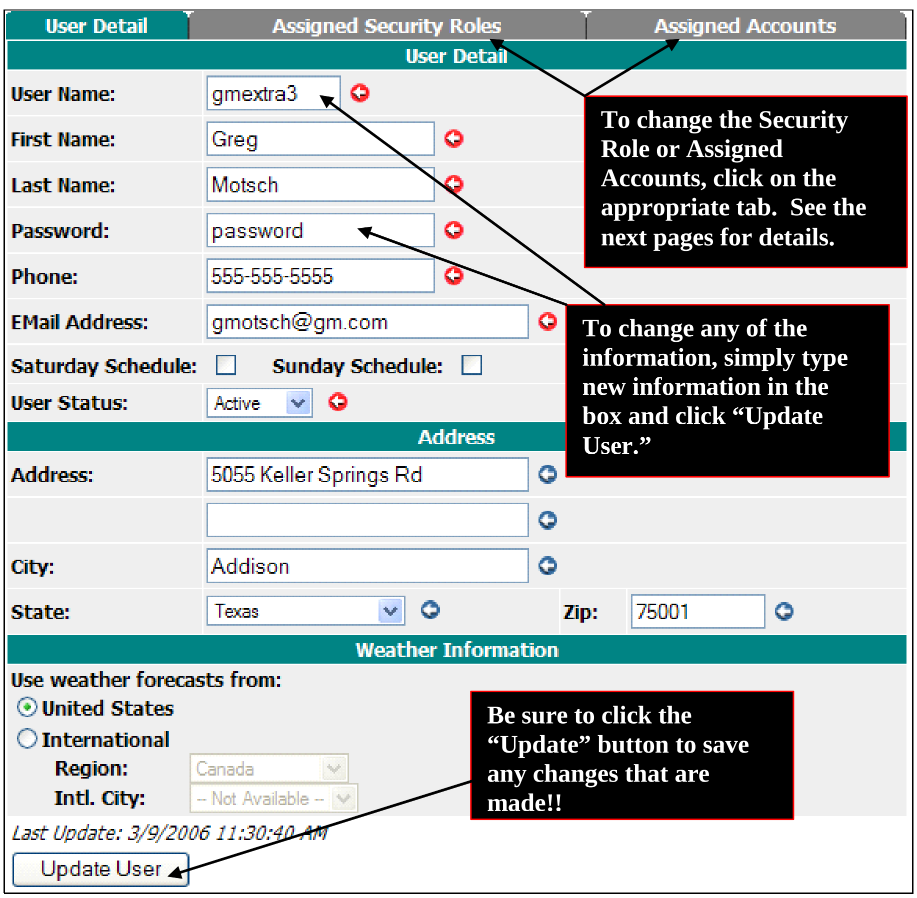


FIGURE 7. User Detail page - User Detail tab

5. Click the **Update User** button at the bottom of the page.

Password Policy

If you lose or forget your password, please call Customer Care. For security reasons, Hyphen Solutions will not give out passwords over the phone. Our policy is to e-mail the information to the e-mail address listed on the Company Profile page.

Assign Security Roles to Users

Each User Name must have a security role assigned to it.

To assign or change a security role:

1. Click the **Manager** tab.
2. Click the **User Manager** link. The User Manager page opens.
3. Click on a **User Name** link. The User Detail page opens on the User Detail tab.

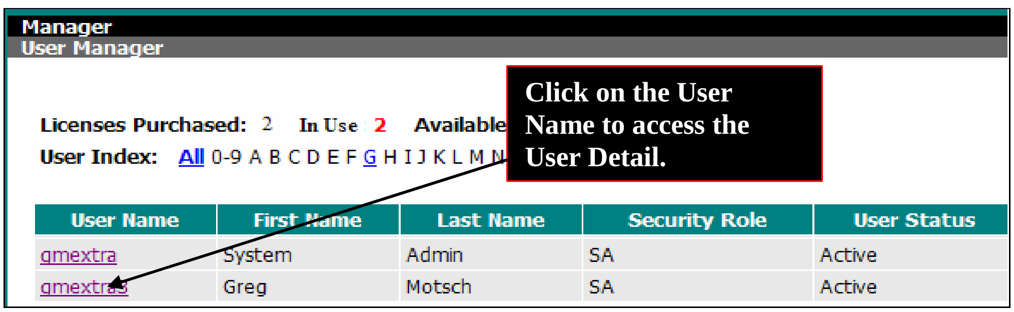


FIGURE 8. User Manager page

4. Click on the **Assigned Security Roles** tab.
5. Click on the **Assign Security Roles** link. The

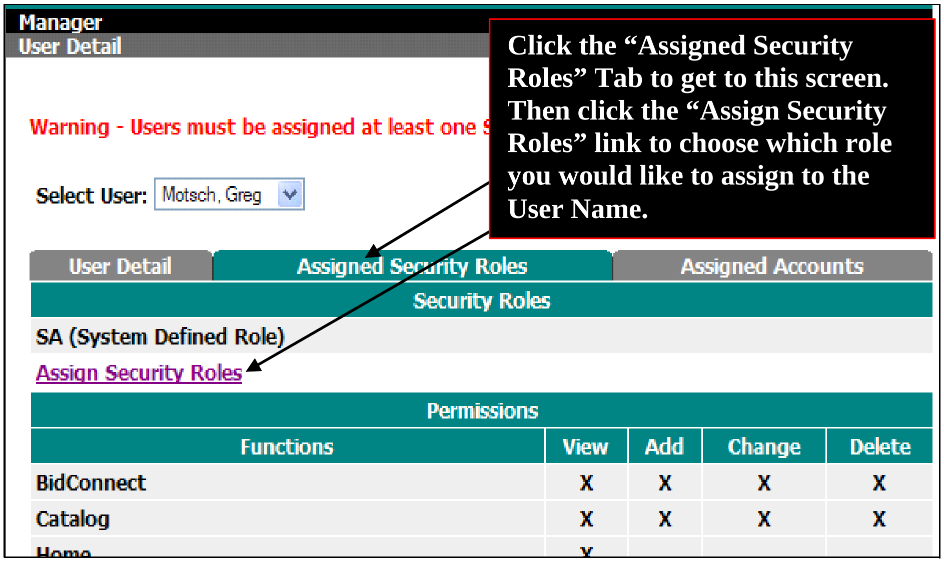


FIGURE 9. User Detail page - Assigned Security Roles tab

6. Click the check box next to the **Security Role** you want to assign to the user.
7. Click the **Update Security Roles** button to save your changes.

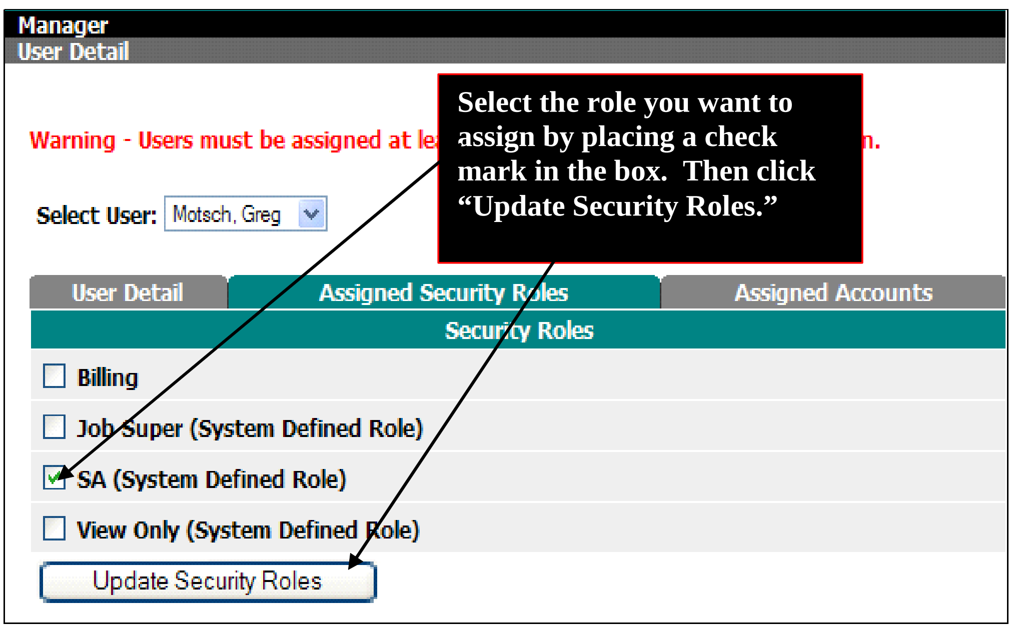


FIGURE 10. User Detail page - Assigned Security Roles tab

Assign Accounts to Users

You can also choose which builders a user has access to by selecting which accounts are assigned to that user.

To assign accounts to a user:

1. Click the **Manager** tab.

2. Click the **User Manager** link. The User Manager page opens.
3. Click on a **User Name** link. The User Detail page opens on the User Detail tab.
4. Click the **Assigned Accounts** tab.
5. Click the check box next to each **Builder Account** you want to assign to the user.
6. Click the **Update Assigned Accounts** button.

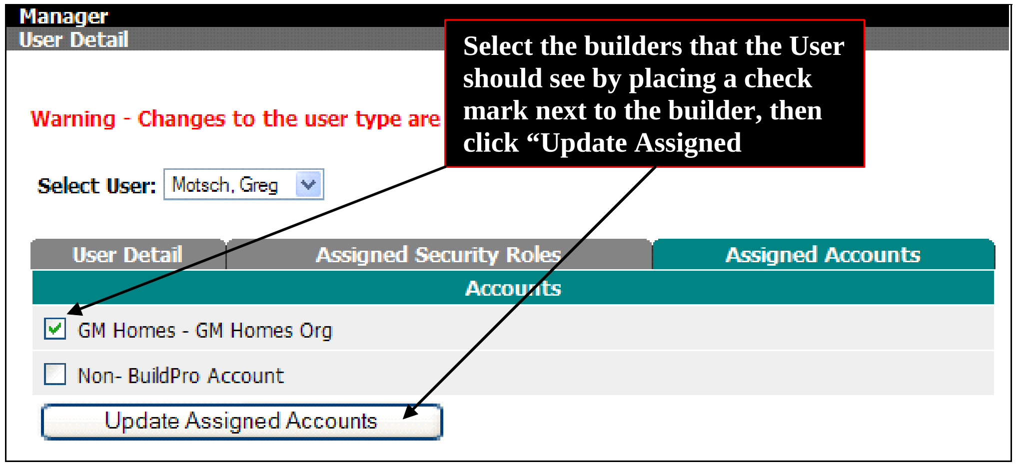


FIGURE 11. User Detail page - Assigned Accounts tab

Account Manager

The Account Manager allows you to see what builders are set up for your company in SupplyPro. These builders are referred to as "Accounts" in SupplyPro. They can be BuildPro builders, meaning they use BuildPro as their primary scheduling tool, or you can add "Non-BuildPro" builders that you work with to this list, and track their orders via SupplyPro.

Note: If you work with a BuildPro builder, but do not see them listed on the Account List page, please contact Customer Care at 1-877-508-2547, Option 4.

To view your Account List:

1. Click on the **Manager** tab.
2. Click on the **Account Manager** link. The Account List page opens.

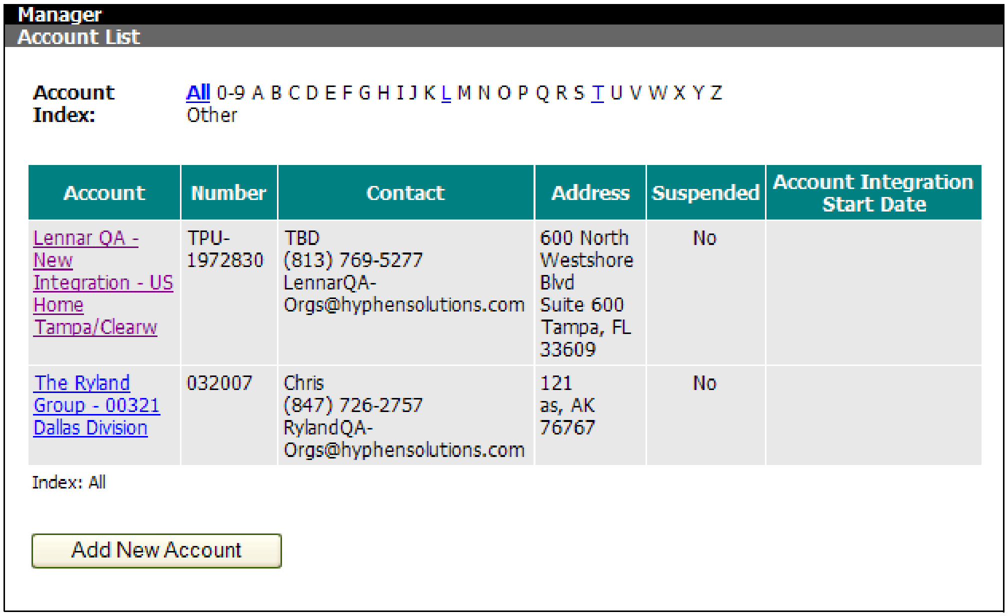


FIGURE 12. Account List page

Edit Account Detail

The Account Detail page shows contact information for the builder account. It also allows the user to set the supplier e-destination settings.

To edit the account detail:

1. Click the **Manager** tab.
2. Click the **Account Manager** link. The Account List page opens.
3. Click an **Account Name** link. The Account Detail page opens.
4. Edit the **Account Detail** section as necessary.
   Note: If the builder changes its company name in BuildPro, it does not update the Account Name in SupplyPro. This field only changes if the supplier updates it.

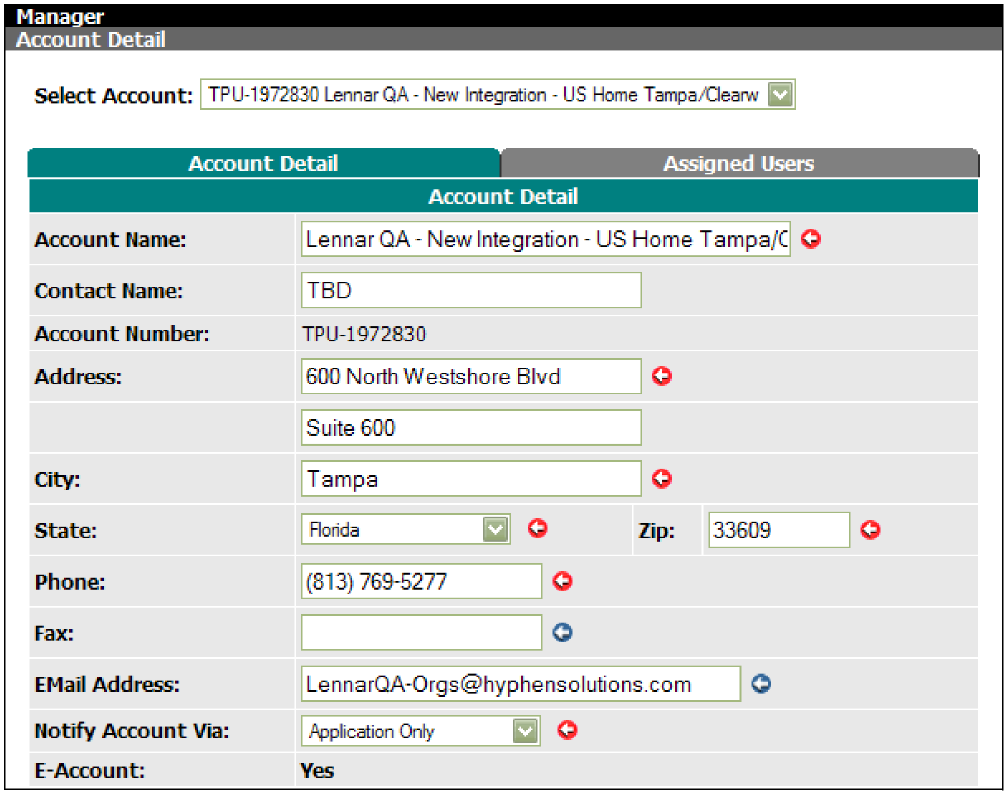


FIGURE 13. Account Detail page - Account Detail section

5. Edit the **Supplier Control** section as necessary.
   - **Purchasing Contact Name** - Enter the name of the contact in the builder's purchasing department who should receive change order requests.
   - **Purchasing Contact Email** - Enter the email address of the person who should receive emails for change order requests.
   - **CC: For Order Change Email** - Enter the email address of the supplier contact who should be copied on all change order requests.

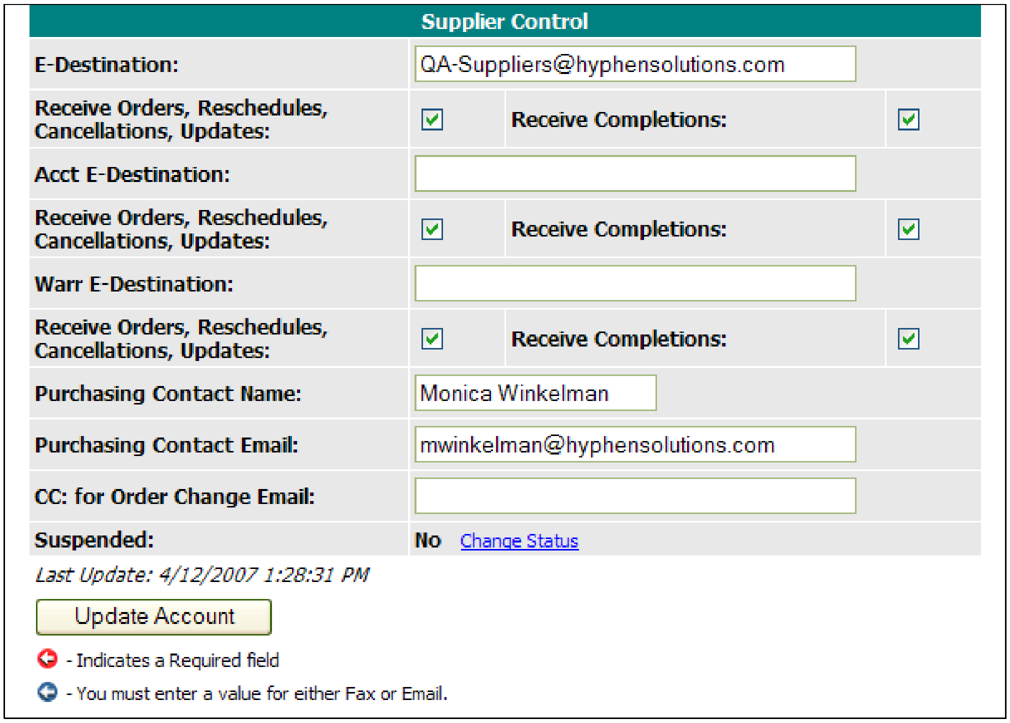


FIGURE 14. Account Detail page - Supplier Control section

6. Click the **Update Account** button to save your changes.

Add, Change, Delete E-Destinations

E-destinations allow you to send a copy of a Purchase Order to an e-mail address. You can choose which type of orders you would like to receive copies of by checking the appropriate boxes.

To add, change, or delete an e-destination:

1. Click the **Manager** tab.
2. Click the **Account Manager** link. The Account List page opens
3. Click an **Account Name** link. The Account Detail page opens.

FIGURE 15. Account List page

4. Under the **Supplier Control** section, edit each **E-Destination**.
   Note: To add multiple e-destinations, put a semi-colon (;) between each e-mail address.
5. Click the **Receive** check boxes to check or uncheck each box.

6. Click the **Update Account** button at the bottom of the page.

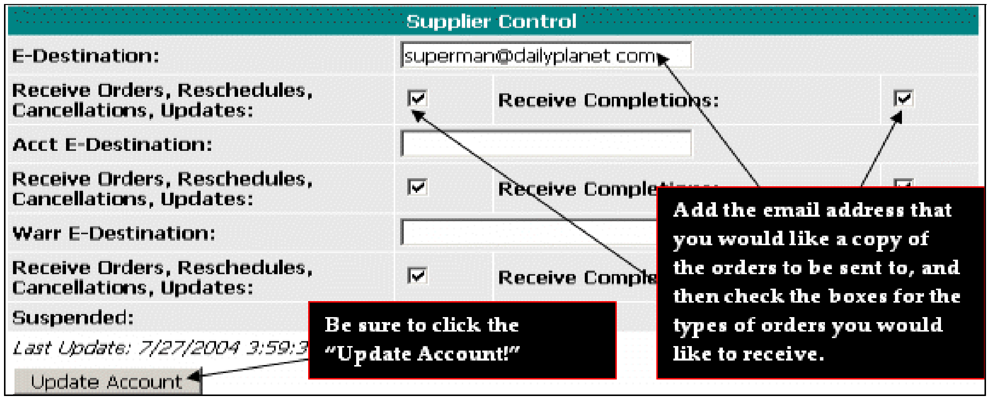


FIGURE 16. Account Detail page

Suspend Builder Account

To suspend a builder account:

1. Click the **Manager** tab.
2. Click the **Account Manager** link. The Account List page opens.
3. Click an **Account Name** link. The Account Detail page opens.
4. At the bottom of the page, click the **Change Status** link next to **Suspended**. The Account Status page opens.

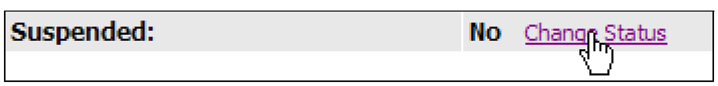


FIGURE 17. Account Detail page - Change Status link

5. Enter **Notes**. (Required)
6. Click the **Suspend Account** button to suspend the account. Suspending an account will remove all users from the account.

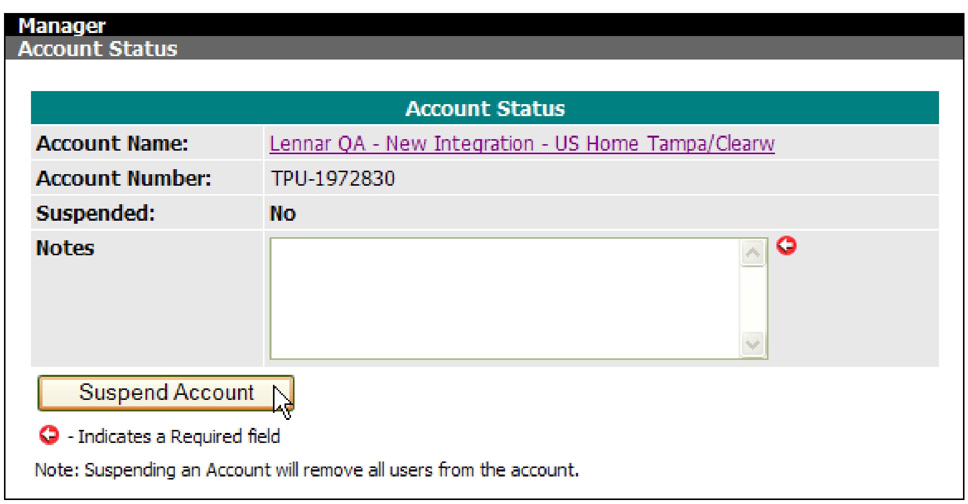


FIGURE 18. Account Status page - Suspend Account

7. To remove the suspended status, click the **Change Status** link on the Account Detail page again. The Account Status page opens.
8. Enter **Notes**.(Required)
9. Click the **Remove Suspended Status** button to change the account status. You must then assign at least one user to the account.

Assign Users to an Account

You can assign users to individual accounts, just like you could assign individual accounts to the User under the User Manager.

To assign users to accounts:

1. Click the **Manager** tab.
2. Click the **Account Manager** link. The Account List page opens.
3. Click an **Account Name** link. The Account Detail page opens.
4. Click the **Assigned Users** tab.

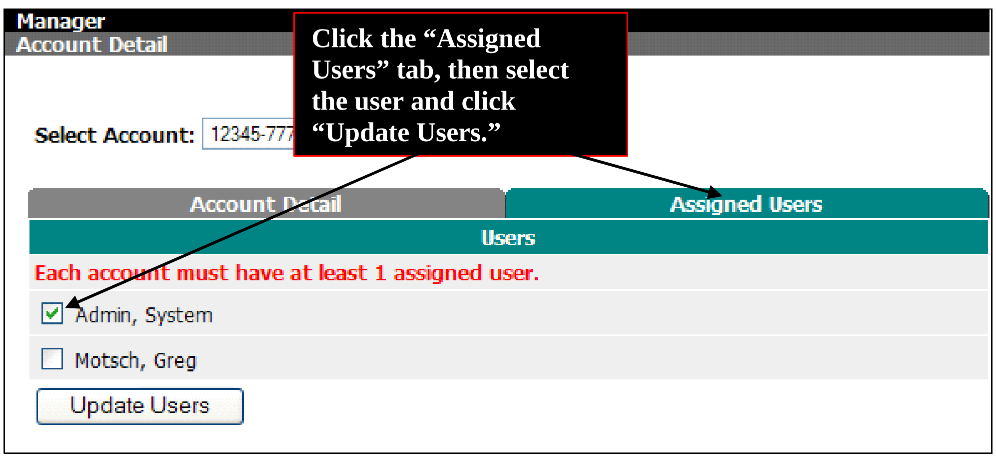


FIGURE 19. Account Detail page - Assigned Users tab

5. Click the check box next to each **User** you want to assign to that account.
6. Click the **Update Users** button.
7. Assign users to another account by choosing from the **Select Account** drop-down list. Click the **Assign Users** tab.

8 Conclusion

SupplyPro User Guide

Objectives

After completing this module, you should have a basic understanding of:

- Your main responsibilities as a supplier using SupplyPro
- Making sure pricing is correct
- Making sure task dates are correct
- How to contact Hyphen Customer Care

Conclusion

This guide contains everything you need to successfully use SupplyPro with a builder who is successfully using BuildPro. Keep in mind that the BuildPro and SupplyPro applications work together, just as you and the builder must work together to effectively schedule work and enable you to track authorizations for payment.

The system requires human intervention on both sides to be successful. Your three main responsibilities as a supplier using SupplyPro are to:

- Accept newly received orders.
- Complete orders from the "To Do" list when you are physically done with the work.
- Clear off all alerts every day, including “Unread Notes,” “Reschedules,” and “Change Orders.”

There are many other features and benefits that SupplyPro can provide, but the basics are the three responsibilities listed above.

In order to be able to use SupplyPro correctly, it is very important that you receive orders with correct dates and pricing etc. If for some reason, you notice that the orders are in SupplyPro, but they have bad dates or incorrect pricing, please contact the builder directly to resolve these issues. Also, if a builder says an order should be in SupplyPro, but you don't see it in “Received,” check the “Potential Orders” report to see if the order appears there. If it does, please contact the builder directly, and advise them that for you to process the order, they need to click “Start” on the task to send it to your SupplyPro account.

As a reminder, for any technical questions regarding how to use SupplyPro, you can watch the online videos, refer to this guide for step-by-step instructions, or contact Customer Care at 1-877-508-2547, Option 4.

We are very happy to have you as a customer and thank you for using SupplyPro!