IT4profit B2B Exchange

Buyside

Quickguide

IT4profit

Bringing
You
Visibility,
Velocity
& Value

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All buy actions listed here require login to IT4profit users area. Make sure you have rights to act in the framework of desired role, otherwise, please contact your local sales representative or email support@it4profit.com

CHOOSE PRODUCTS

1. Go to **Shop IT products** module
2. Select **Supplier**
3. Tick off **Viewing options** and press **Apply** button
4. You can find products:
   - **By Categories**
   - **By Manufacturers**
   - **"A…Z"** - in alphabetic order
   - using **Simple** or **Advanced** search
   - or type product name in the Search field and click **Search**
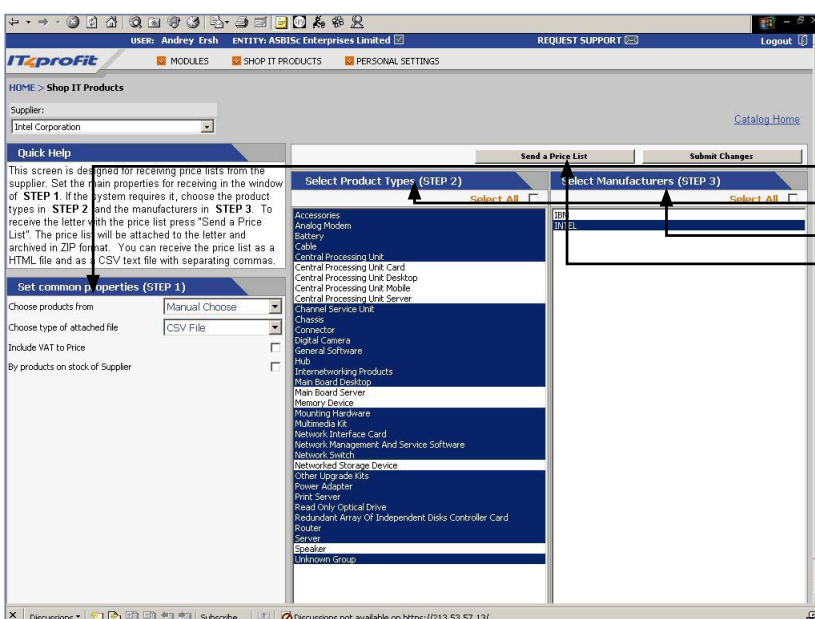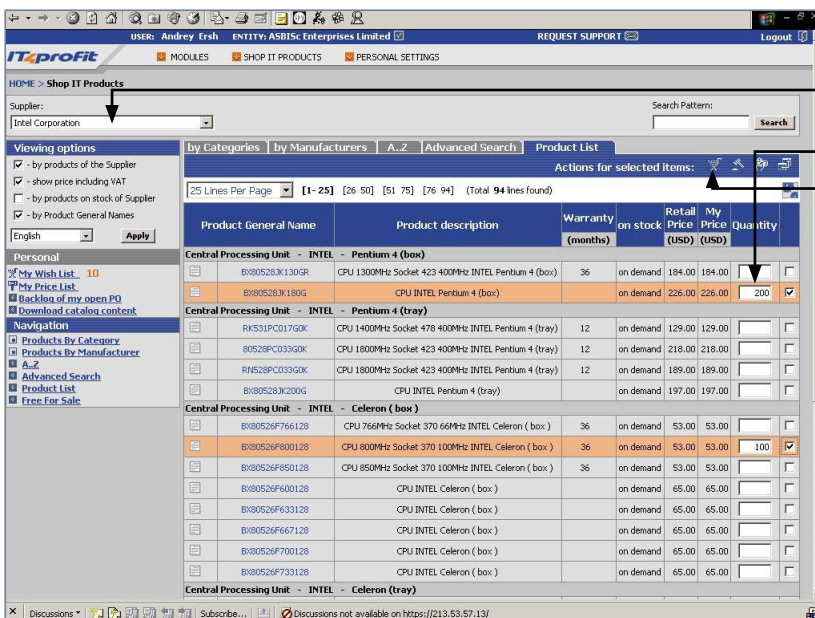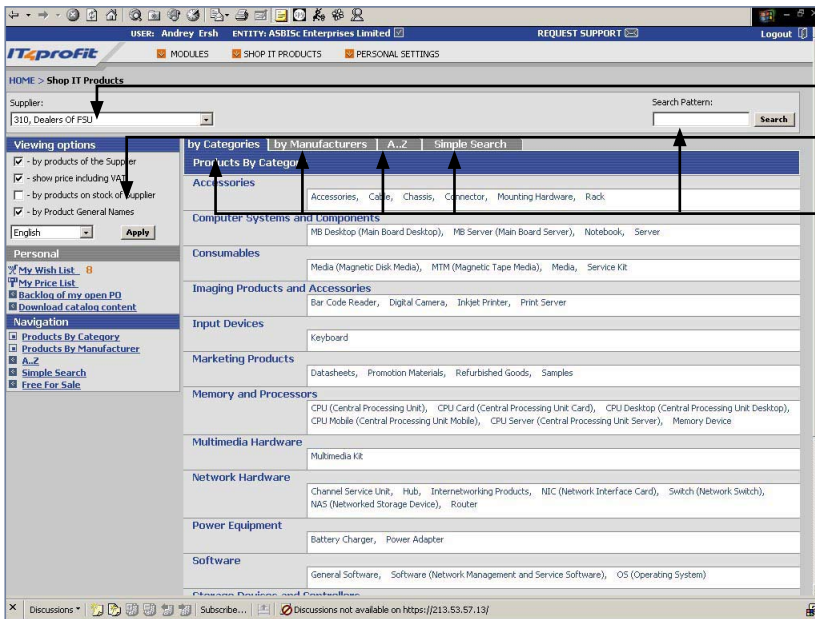
MAIN MENU >>

CREATE WISH LIST*

1. Go to **Shop IT products** module
2. Select **Supplier**
3. Select required products
4. Indicate quantity for required products
5. Press [icon] to add products to a **Wish List**
6. Additional features:
   To **Compare Attributes** press [icon] icon
   To **Make Purchase Order** press [icon] icon
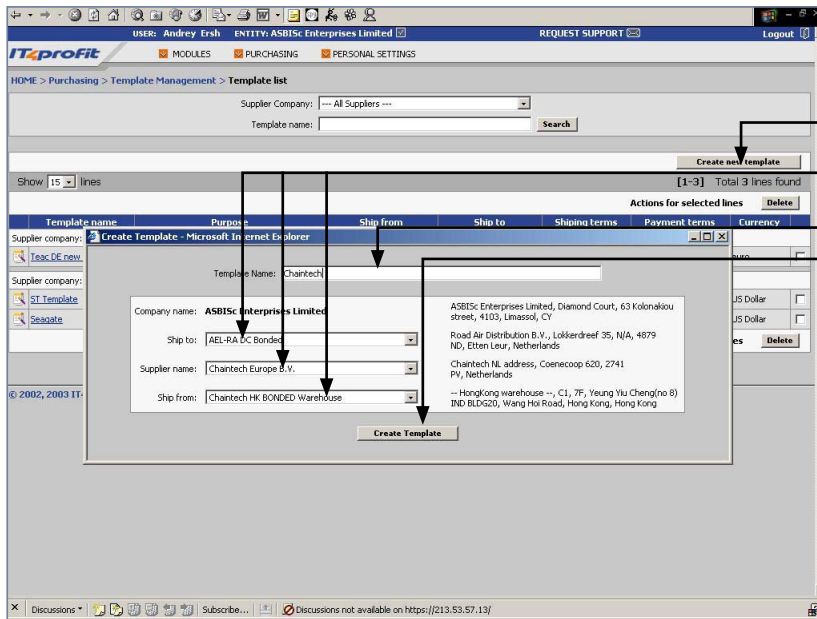   To **Make RFQ deal** press [icon] icon

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RECEIVE MY PRICE

1. Go to **Shop IT products** module
2. Select **Supplier**
3. Click on **My Price List** link
4. Set **Common Properties**
5. Select **Product Types**
6. Select **Manufacturers**
7. Press **Send a Price List** button to receive price list by e-mail
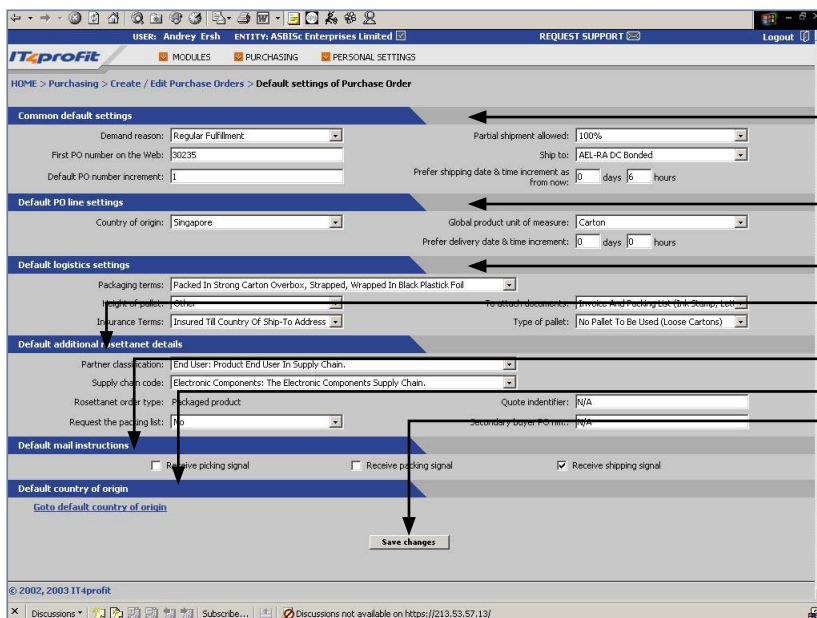
MAIN MENU >>

CREATE TEMPLATE FOR PURCHASE ORDER

1. Go to **Purchasing > Template Management > Template List**
2. Press **Create new template** button
3. Define **Ship to**, **Supplier Name** and **Ship from** address
4. Enter **Template Name**
5. Press **Create Template** button

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MANAGE DEFAULT SETTINGS OF PURCHASE ORDER

1. Go to **Purchasing > Create/ Edit Purchase Orders > Default Setting of Purchase Order**
2. Set **Common Default settings**
3. Set **Default PO line settings**
4. Set **Default logistics settings**
5. Set **Default additional RosettaNet details**
6. Select **Default mail instructions**
7. Select **Default country of origin**
8. Press **Save changes** button

MAIN MENU >>
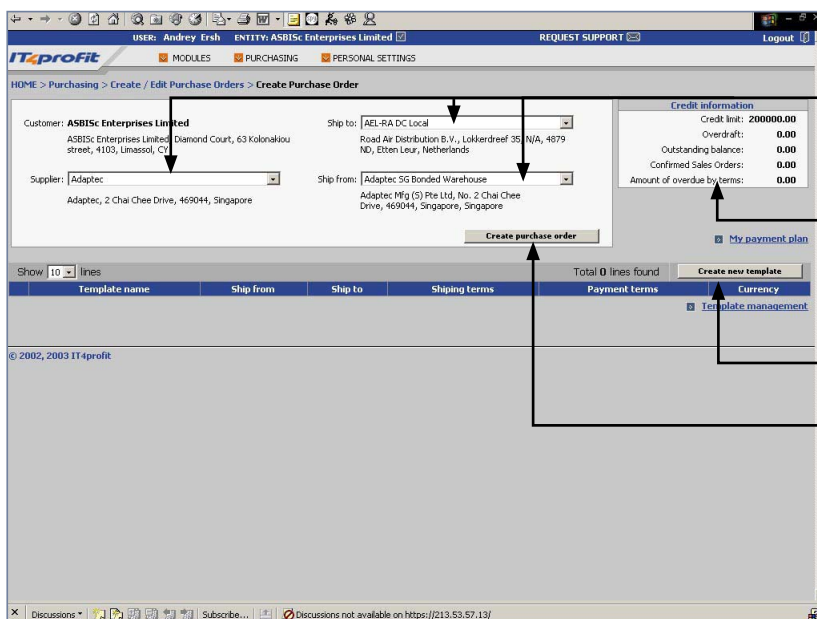
CREATE PURCHASE ORDER VIA PURCHASING MODULE

1. Go to **Purchasing > Create/ Edit Purchase Order > Create Purchase Order**
2. Select **Supplier, Ship to** and **Ship from** addresses.
3. After setting necessary parameters the page will update automatically and **Credit information** of the selected supplier will appear on the right side of the screen
4. To use this settings for future Purchase Orders, press **Create new template** button.
5. Press **Create Purchase order** button

MAIN MENU >>
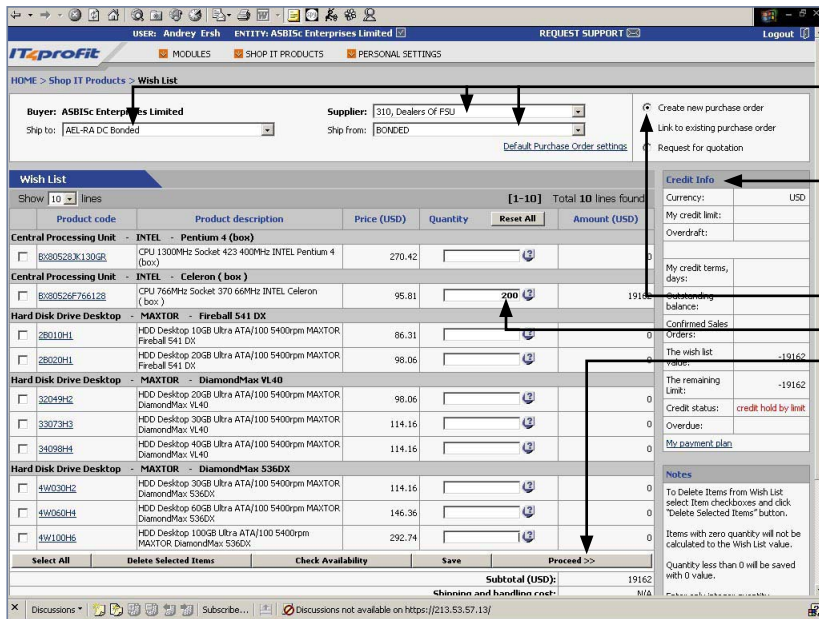
CREATE PURCHASE ORDER USING WISH LIST

1. Go to **Shop IT Products > Wish List**
2. Choose **Supplier, Ship to** and **Ship from** addresses
3. After setting necessary parameters the page will update automatically and **Credit information** of the selected supplier will appear on the right side of the screen
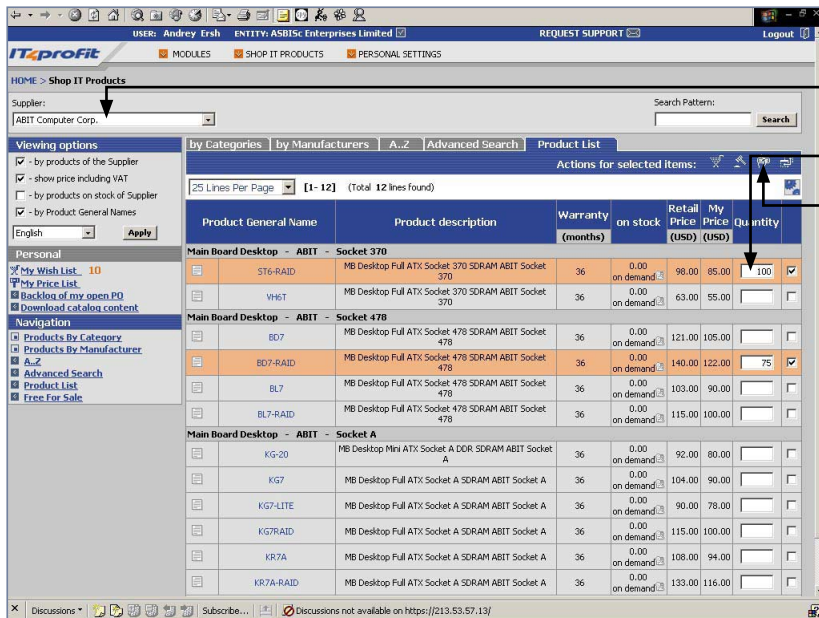4. Tick off **Create new purchase order**
5. Indicate quantity of required products.
6. To create purchase order press **Proceed** button

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CREATE PURCHASE ORDER VIA E-CATALOG

1. Go to **Shop IT Products**
2. Select **Supplier**
3. Select required products
4. Indicate quantity of required products
5. Press [icon] icon to **Create Purchase order**
6. Additional features:
   To **Compare Attributes** press [icon] icon
   To **Create Wish List** press [icon] icon
   To **Make RFQ deal** press [icon] icon

MAIN MENU >>
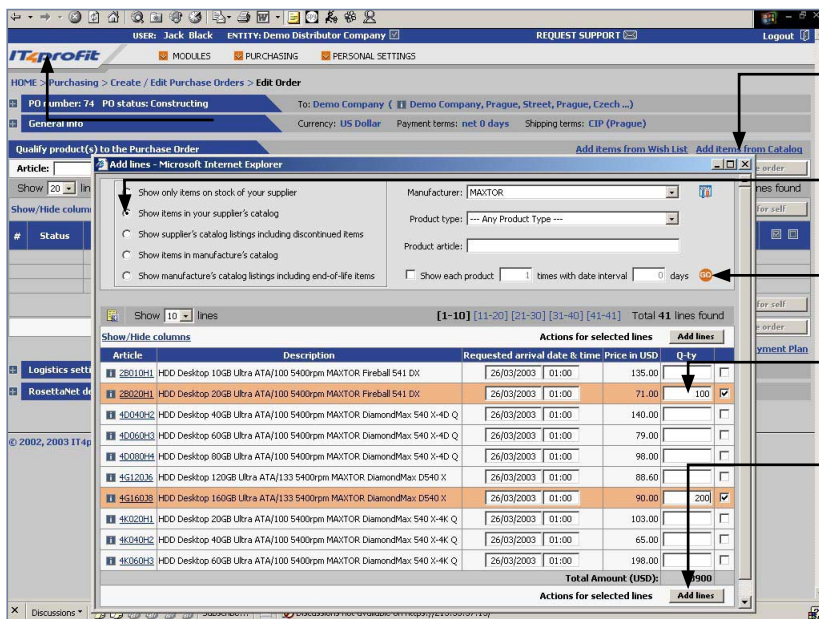
ADD ITEMS TO PURCHASE ORDER FROM CATALOG

To add new line to the opened Purchase Order from e-Catalog :
1. Click **Add items from catalog** in the **Edit order** page
2. On the pop up window select type of Supplier's catalog
3. Select **Manufacturer, Product type** and press **GO** button to find required products
4. Select products and indicate quantity. If price negotiation is allowed, enter your desired price
5. Press **Add lines** button. If necessary, repeat for other products. Close the window
6. Enter **Requested time of arrival to destination** for each product
7. Press **Save & Send purchase order** button to send Purchase Order to your Supplier

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ADD ITEMS TO PURCHASE ORDER USING CREATE ARTICLE AND SKU

If your are creating PO to Supplier who doesn't support IT4profit e-Catalog, you can create **New Product Article and SKU**.

1. Press [icon] on the **Add lines** pop up window
2. Choose **Manufacturer**
3. Enter **Article**. You can **Copy Article** from IT4profit e-Catalog
4. Enter **Short Name**
5. Enter **SKU code**
6. Define **Product type**
7. Select **Country of origin**
8. Set product **Condition**
9. Define **Sales Price**
10. Press **Create** button and close window
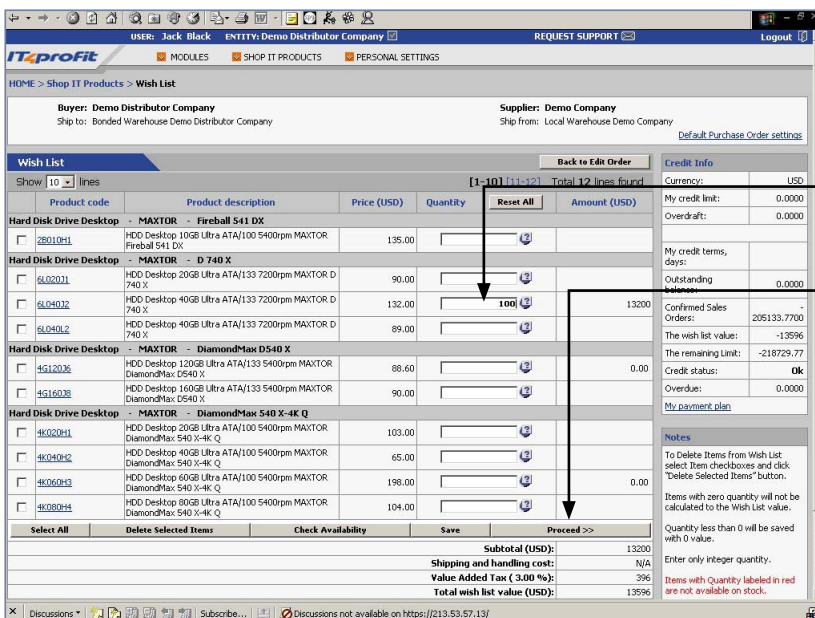11. Press **Save & Send purchase order**

MAIN MENU >>
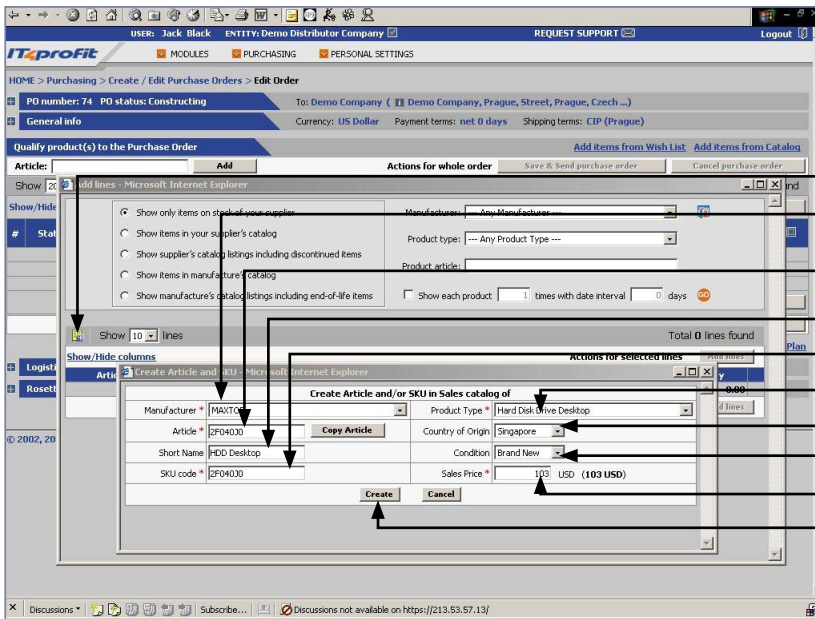
ADD ITEMS TO PURCHASE ORDER FROM WISH LIST

If Wish List is created:

1. Click **Add items from Wish List** on the **Edit order** page
2. Select products and indicate quantity on the **Wish List** page. If price negotiation is allowed, enter your desired price
3. Press **Proceed** button
4. Select **Country of origin**, product **Condition** and define **Delivery date** for each product
5. Press **Save & Send purchase order** button
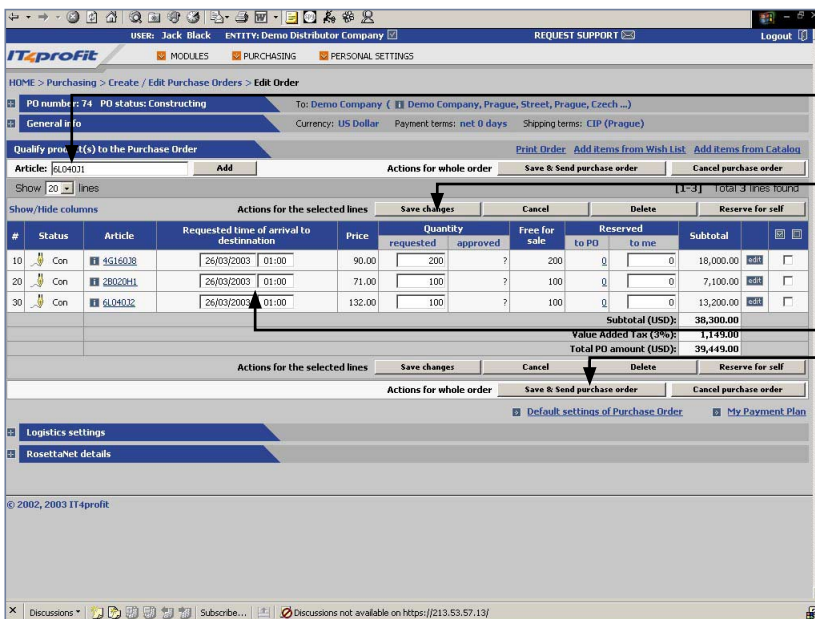
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ADD ITEMS TO PURCHASE ORDER BY ARTICLE

1. Type article in the **Article** field on the **Edit order** page
2. Press **Add** button.
3. Press **Save changes** button. The system will check automatically if the entered article(s) are correct
4. Set **Requested time of arrival to destination** for each product
5. Press **Save & Send purchase order** button

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VIEW/ EDIT BACKLOG OF OPEN PURCHASE ORDER

1. Go to **Purchasing > Create / Edit Purchase Orders > Backlog of Open Purchase Orders**
2. Click on **PO#** to add new lines, change **Requested time f arrival to destination, Quantity** or make **Reserve for self**
3. Then press **Save changes** button in the **Edit order** window
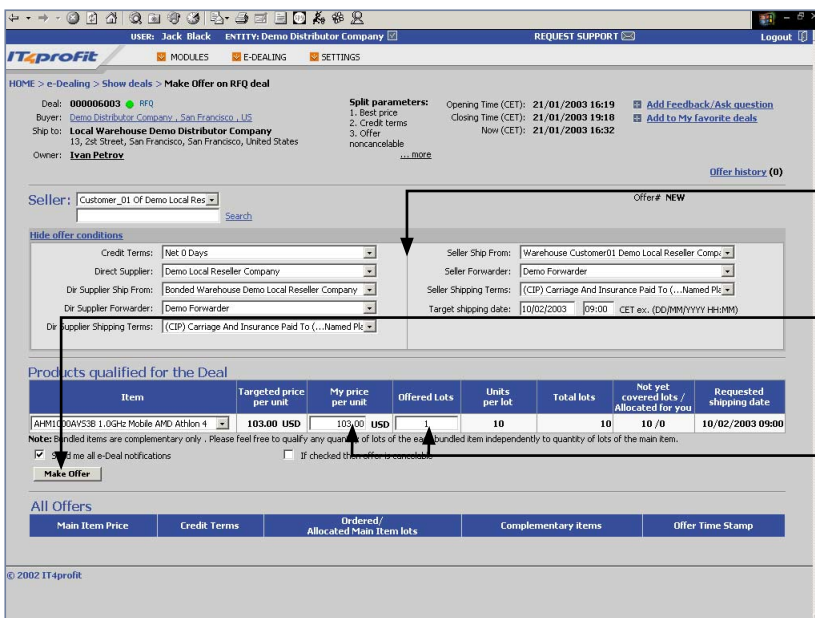4. Press **Save & Send purchase order** button
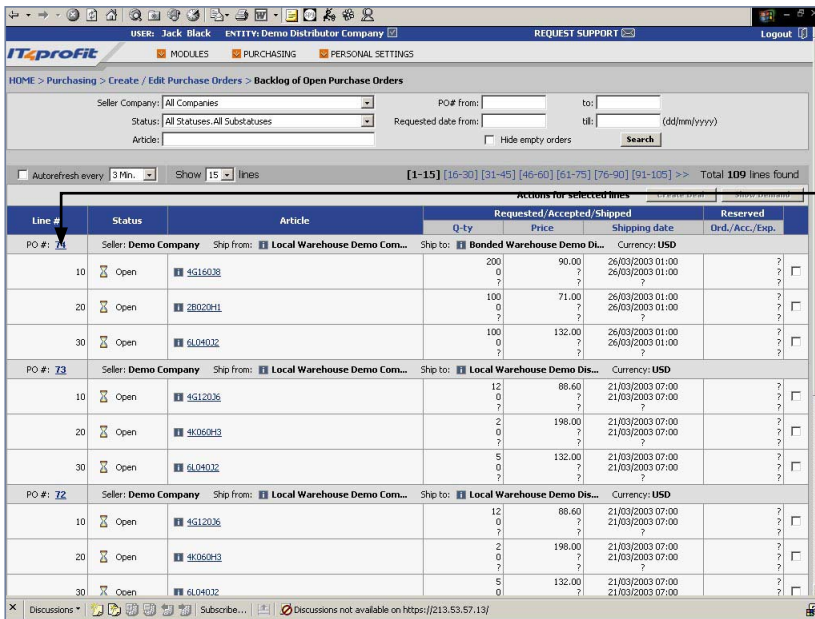
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MAKE OFFER

1. Go to **e-Dealing > My offers**
2. Find Deal required
3. Click on the **Dea**l #
4. Set **Offer conditions**
5. Enter your **Price** and number of **offered lots**
6. Press **Make offer** button to submit the bid

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ENTER REQUEST FOR QUOTATION (RFQ)

1. Go to **e-Dealing > Create New Deal**
2. Select **Request For Quotation** Deal type, define **Ship to** address, **Currency** and press **Create Deal** button
3. Click **Select/Add Item** to specify products for the deal . Select products on the pop up window. Indicate **Price**, **Shipping date**, **Quantity** and **Total units**. Press **Add items directly for request** button. Close window
5. To invite Suppliers click on **Change Invitation List**. Select **Merchants, Targeted Market Segment, Bidders,** define **Deal Notification** and press **Confirm and Go Back** button
6. Click on **Change Bidding Parameters**, set **Priority Parameters,** press **Save and Go Back** button
7. Set **Date** & **Time** of bids opening/ closing and check **Deal Notification**
9. Press **Open deal now** or **Open deal by time schedule**

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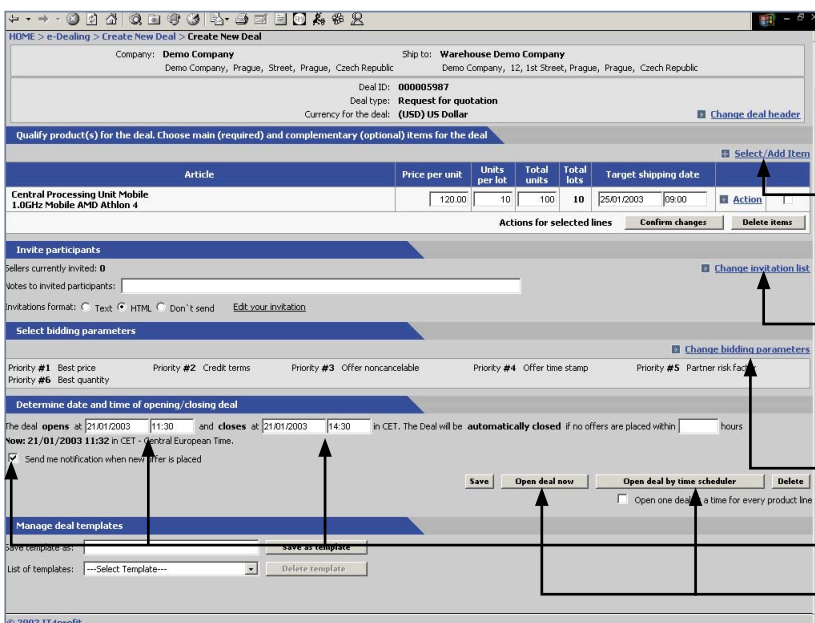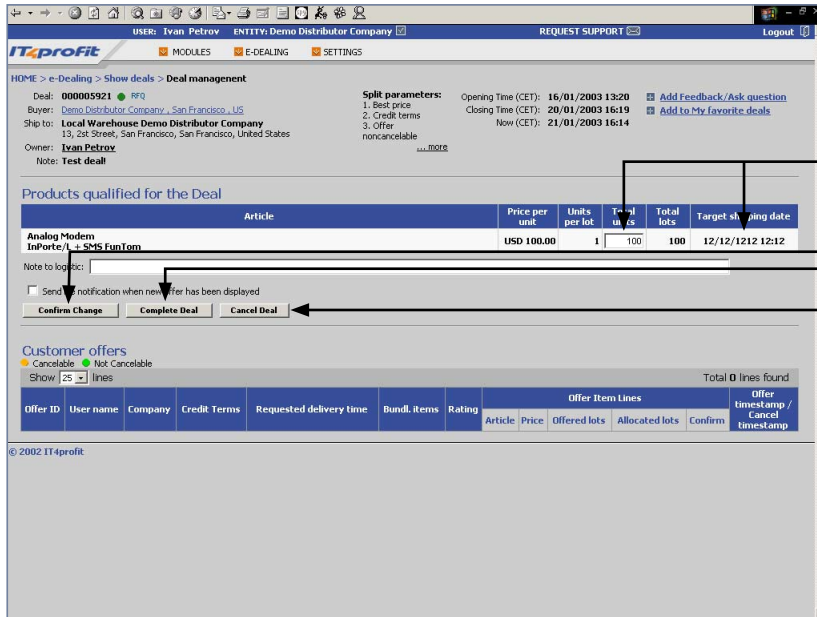
CHANGE DEAL PARAMETERS

1. Go to **e-Dealing > Show deals > Deal management**
2. Choose deal and click on the **Type** of deal
3. If necessary, edit **Price** and **Target shipping date**
4. Press **Confirm Change** button
5. If you want to close the deal before defined time, press **Close deal** button
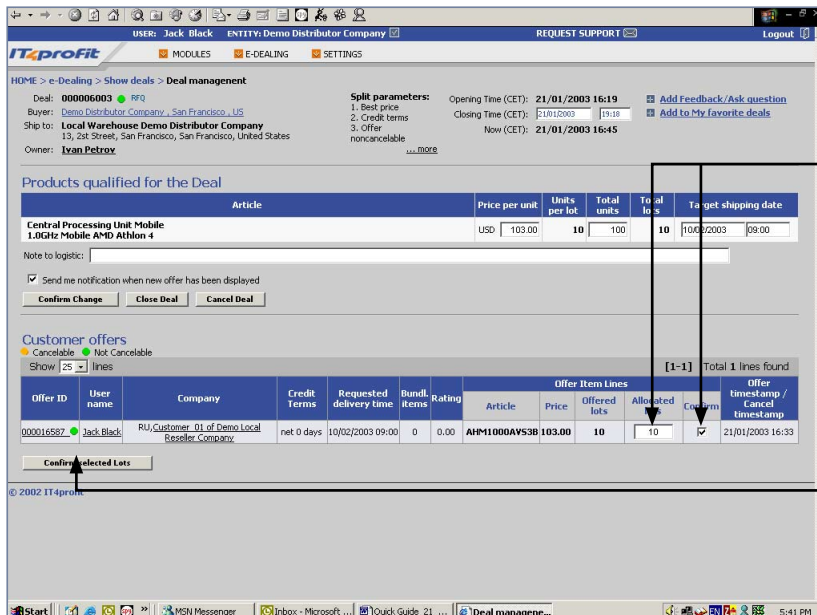6. To cancel deal press **Cancel deal** button

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CONFIRM OFFERS AND ALL LOTS

1. Go to **e-Dealing > Show deals > Deal management**
2. Choose deal and click on the **Type** of deal
3. Enter number of **Allocated lots** and tick off **Confirm** for each winner company
4. Press **Confirm Selected lots** button to create Purchase order on behalf of selected companies

MAIN MENU >>

GLOSSARY

IT4PROFIT B2B EXCHANGE

Is the online many-to-many business-to-business "B2B" Exchange for professionals in the Information Technologies "IT" industries. It enables multiple suppliers and buyers to trade IT components, subsystems, systems, technologies and services at dynamic prices.

ROLE

Determines company's rights in a Business Group at IT4profit B2B Exchange. Roles have meaning only within a particular Business Group. The possible roles are Supplier, Client, Merchant, Creditor, Logistic, Manufacturer.

E-CATALOG

Defines and organizes rich detailed content about all products and services offered at the Exchange.
Besides product content that support the purchasing decision, Buyer gets access to Suppliers updated product prices and stock availability. Buyer can create and manage his wish lists.

PRODUCT CARD

Detailed product information in the form of HTML card. Each product card includes: name, image, detailed technical specification, marketing, packing, logistics and warranty information.

WISH LIST

Accumulates products that Buyer intend to put in his Purchase Order.

PURCHASE ORDER

The document that Buyer sends to Supplier to confirm readiness to buy products on specified terms.

PRICE NEGOTIATION

Allows Buyer to set his target price for each item in the existing Purchase Order.

RECEIVED WITH CLAIMS

If Buyer has Claims on quantity or arrival date of products received, he can confirm receiving goods by setting "Received with Claims" status and put his corresponding comments for each product line.

DEAL

The proposal made by deal organizer to the invited participants. Both seller-driven and buyer-driven deals can be organized.
If Buyer is invited to a deal by his Supplier and is interested in this proposal, he can send an offer specifying his buying preferences. Buyer can view supply-demand ratio and change his offer accordingly, while the deal is opened.

REQUEST FOR QUOTATION (RFQ)

Buyer-driven type of deal that allows Buyers to create deals with downward price and delivery terms negotiation, to set time, bidding and priority parameters for each deal, to invite all Suppliers to offer supply on Buyer's demand proposal.
Buyer can manage deals, monitor demand-supply ratio and select best offers from Suppliers based on his particular interests.