IT4profit B2B Exchange

Quick guide

Sell side

IT4profit

Bringing
You
Visibility,
Velocity
& Value

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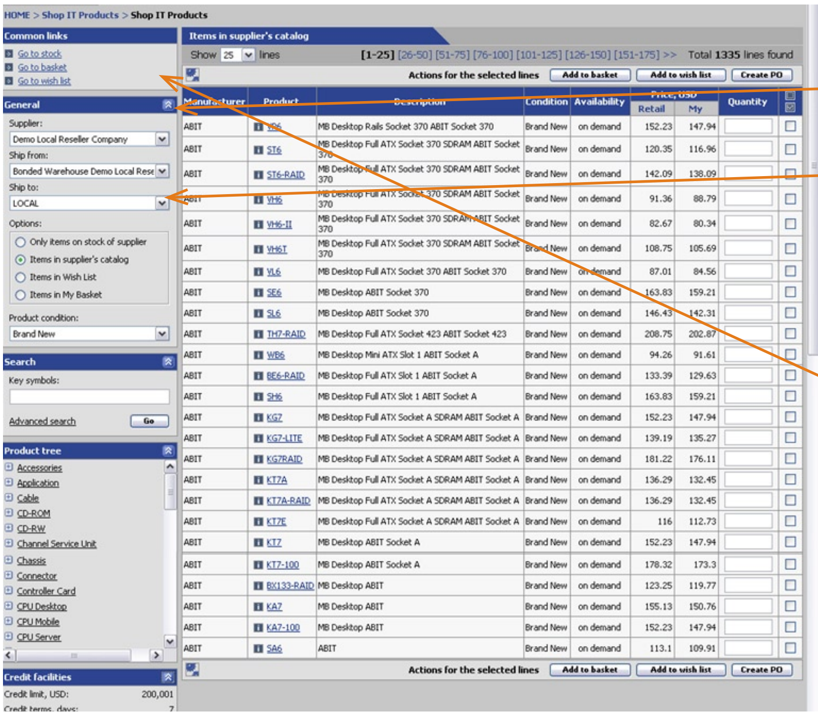
All actions listed here require login to IT4profit users area. Make sure you have rights to act in the framework of desired role, otherwise, please contact your local sales representative or email to Support@it4profit.com



e-Catalog Navigation

1. Go to **Shop IT Products** module
2. Use [icon] to extend or collapse navigation panels on the left side of a screen: General, Search, Product tree and credit facilities.
3. Select **Supplier, Ship to, Ship from** and other necessary General search conditions.
4. To find products:
   - type item code in **Search field**
   - search by product types using **Product tree**
   - or use **advanced search**
5. Use **Common Links** to access **stock**, **basket** and **wish list**.

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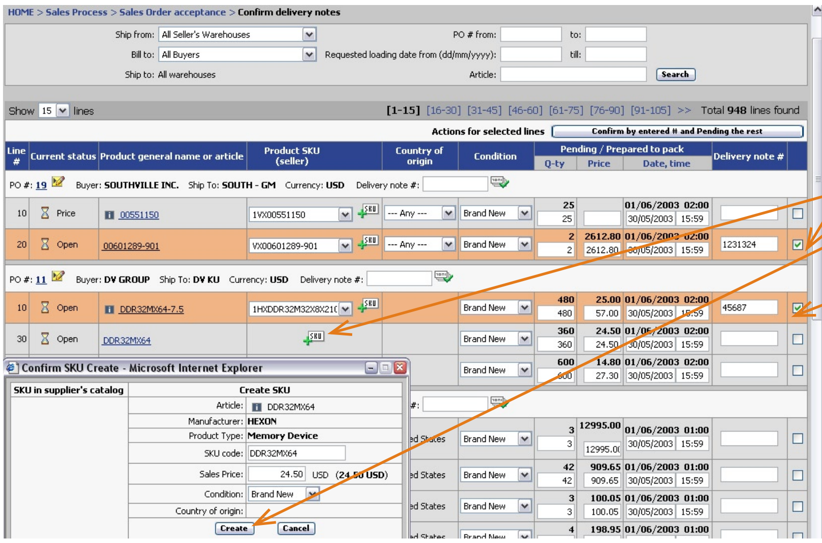

Confirm delivery notes

To confirm PO for SKU's not available in e-Catalog

1. Go to **Sales Process>Sales Order Acceptance>Confirm delivery notes**
2. Select lines to confirm using filters and **Search**
3. If SKU is not available, click on **+SKU**
4. In popup window enter code, price and other parameters and press **Create**
5. Tick off selected lines and enter delivery notes and press **Confirm by entered # and pending the rest**

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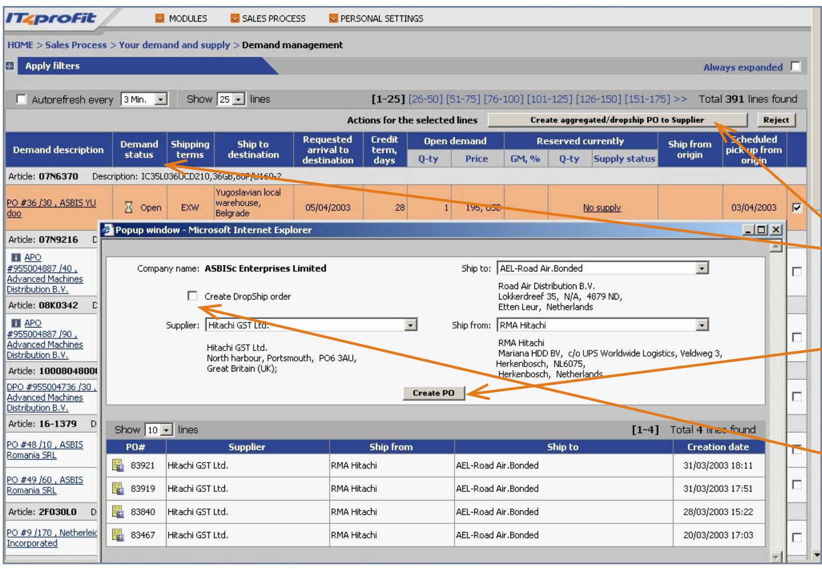

Create aggregated / dropship PO

Aggregated PO to Supplier can be created by Merchant from one or several POs from Customer(s) with **Pending.Open Demand** status

1. Go to **Sales Process > Your demand and supply > Demand management**
2. PO lines can be grouped by **Articles** or by **Customers**. Use filter and press **Search** button
3. Check required PO lines in **Open Demand** status and press **Create aggregated/ Dropship PO to Supplier** button
4. Choose **Supplier, Ship to, Ship from** address and press **Create PO** button
5. Change PO general parameters if necessary and press **Save & Send purchase order**

Note: If all PO lines with **Open Demand** belong to **one Customer** Merchant can create **Drop Ship Order** to **one Supplier.** For this just tick off **Create DropShip order** before pressing **Create PO** button

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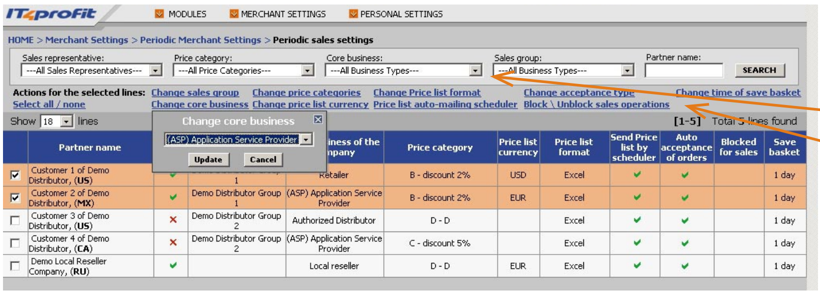

Set Periodic Sales Settings

1. Go to **Merchant Settings > Periodic Merchant Settings > Periodic Sales Settings**
2. Search partners using filters
3. Make necessary changes in **Sales Group, Price Categories, etc.** sections for selected Partners
4. To set **Periodic Credit settings** contact **Credit Manager** of your company. To set **Periodic finance control settings** contact **Finance controlle,** To set **Periodic Logistic settings** contact your **Logistic Manager**

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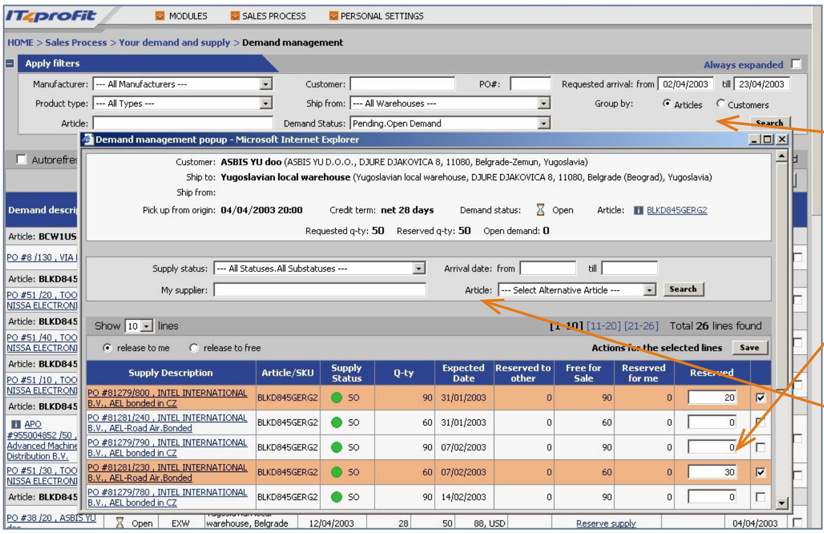

Reserve products to open demand in customer's purchase orders using demand management

1. Go to **Sales Process > Your demand and supply > Demand management**
2. Search required Purchase Order with supply status **Reserve supply** using filter. Purchase Orders can be grouped by **Articles** or **Customers**
3. Click on **Reserve supply** link
4. In the new pop up window enter required **Reserved** quantity but not more than in **Free for sale** and **Reserved for me** sections. Check **Requested**, **Reserved** and **Open demand** quantity. Press **Save** button and close the window
5. After saving reserved supply appears in **Reserved currently** section. If supply is not available create **Aggregated or dropship PO to Supplier**

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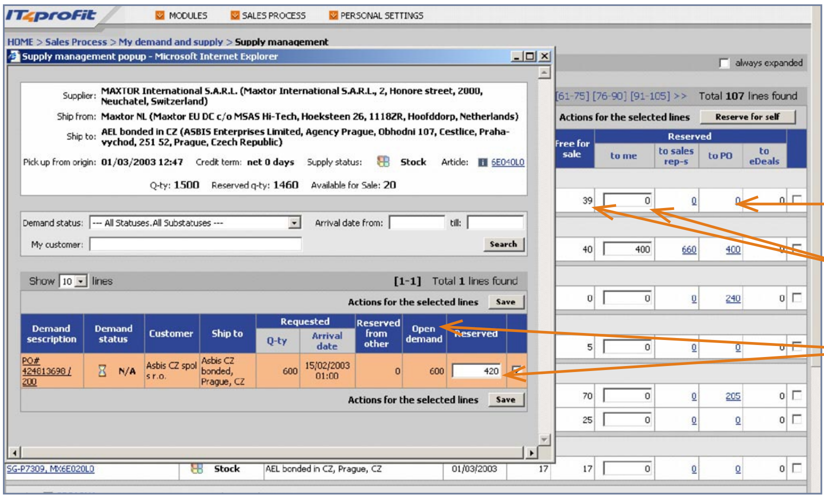

Reserve products to open demand in customer's purchase orders using Supply management

1. Go to **Sales Process > Your demand and supply > Supply management**
2. Apply filters to search for required supply and press **Search** button
3. To reserve products to customer's PO select product and click on figure in **to PO** column
4. **Products Available for sale** include **Reserve to me** plus **Free for sale.** You can see Purchase Orders only with status **Open Demand**
5. To reserve supply enter required **quantity** (but not more than **Available for sale**) then press **Save** button and close the window

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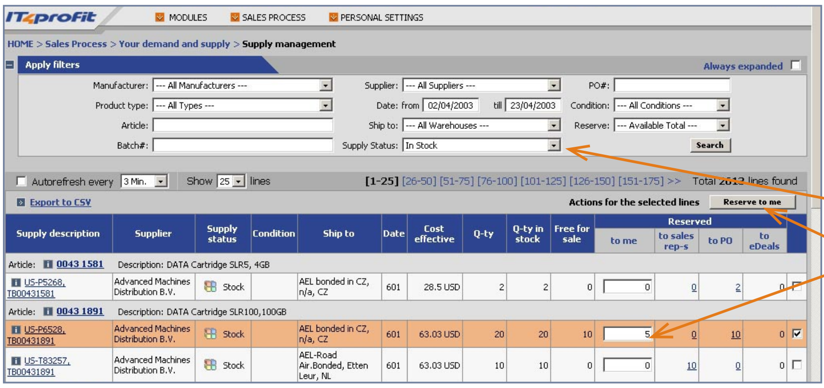

Reserve products to yourself using Supply Management

If required goods are available **In Stock** or in **Expected Arrivals** you can reserve them to yourself.

1. Go to **Sales Process > Your demand and supply > Supply management**
2. Apply filters to search for required supply and press **Search** button
3. To reserve products from **Free for sale** to yourself enter quantity in "**to me**" column and press **Reserve to me** button. To reduce your reserve enter lesser quantity in "**to me**" column and press **Reserve to me** button

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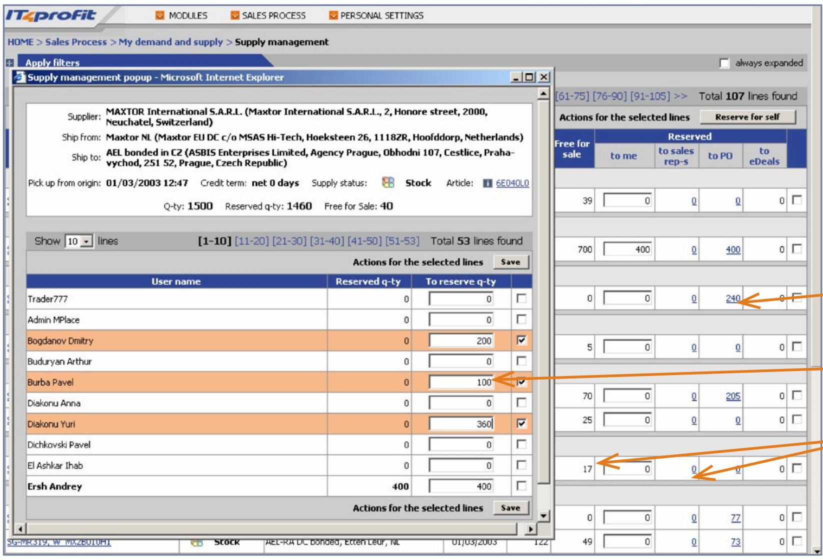

Reserve products to your sales representatives using Supply Management

If required goods are available **In Stock** or in **Expected Arrivals** you can reserve them to your sales representatives.

1. Go to **Sales Process > Your demand and supply > Supply management**
2. Apply filters to search for required supply and press **Search** button
3. To reserve products to your **sales representatives** select product and click on figure in column "**to sales rep-s**"
4. Reserve required quantity to selected sales representatives.
5. Check **Reserved q-ty** and **Free for Sale q-ty**. If you reduce your reserve, Free for sale quantity will be increased. Press **Save** button and close the window.

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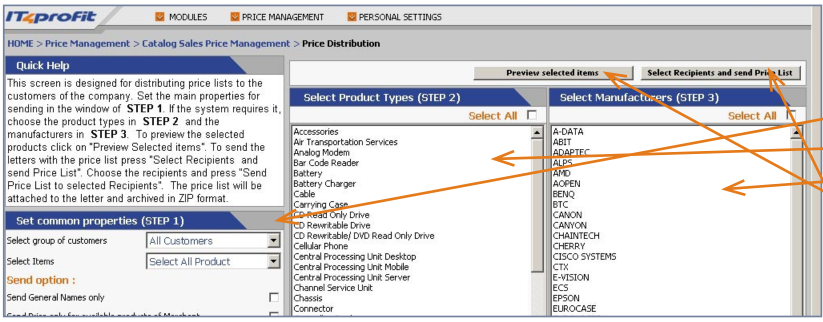

Sales price distribution

1. Go to **Price Management > Catalog Sales Price Management > Price Distribution**
2. Set **Common properties**
3. Select **Product Types**
4. Select **Manufacturers**
5. Press **Preview selected items** to preview the selected products
6. Press **Select Recipients and send Price List** button to send Price List

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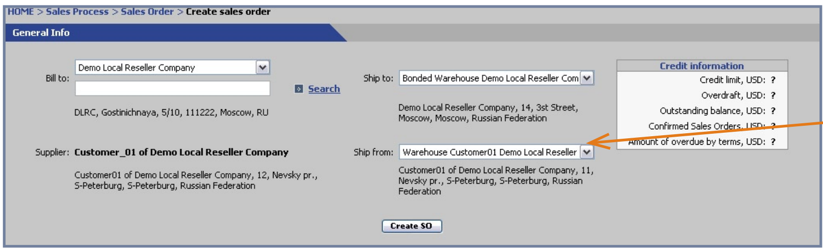

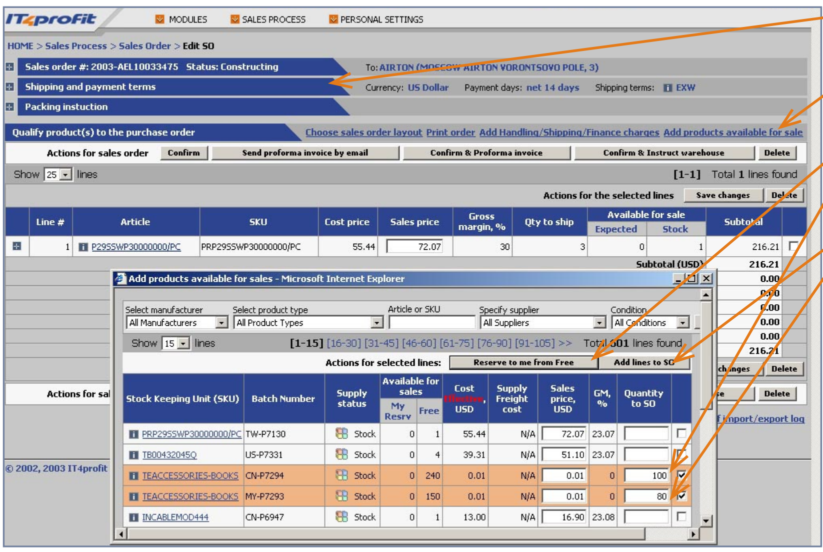

Create Sales Order via Sales Process

1. Go to **Sales Process > Sales Order > Create sales order**
2. Select **bill to**, **Ship to** and **Ship from** address and press **Create SO** button
3. You can change **Sales order**, **Shipping and payment terms**, **Packing instructions**
4. To add products to Sales Order press **Add products available for sale** link
5. In the pop up window reserve products from **Free Stock** when creating a Sales Order. Enter the quantity in the **Quantity to SO** section and press **Reserve to me from Free**
6. To add products enter quantity required in the **Quantity to SO** section and press **Add lines to SO** button. Close the window
7. Click on button to see from where the supply is reserved.
8. To create Sales Order press **Confirm** button
9. If Customer has to pay before releasing goods, press button **Confirm and Proforma invoice**

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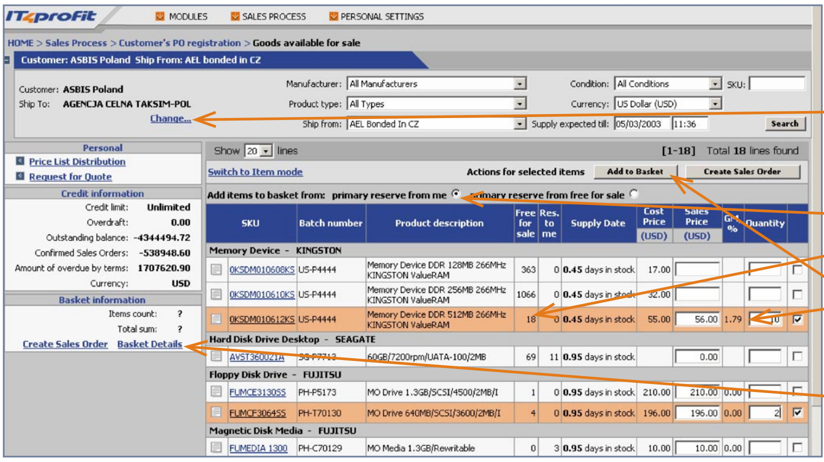

Move goods available for sale to basket

1. Go to **Sales Process > Sales Order > Goods available for sale**
2. Select **Customer**, define **Ship to** and **Ship from** address
3. Use filters to search for products
4. Set **primary reserve** source
5. Products can be added to Basket from **Free for Sale** or **Reserve to me.**
6. Enter required **quantity** for selected items, change **Sales price** if needed, check **Gross Margin** (GM) and press **Add to Basket** button
7. To check/ move products in your basket click on **Basket details** link

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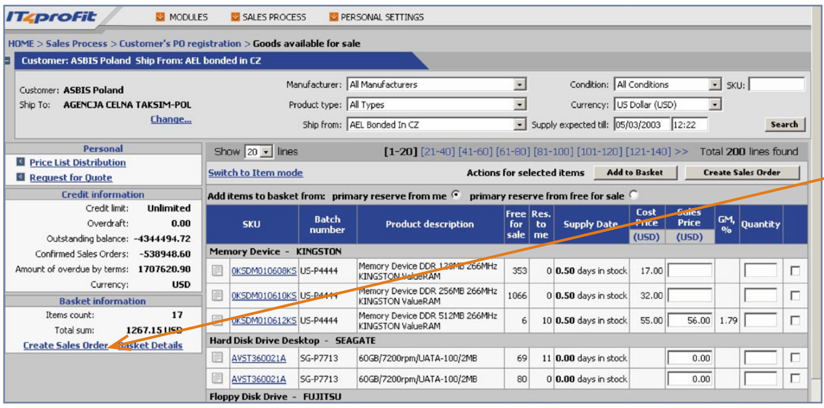

Create Sales order via goods available for sale

To create Sales Order for all goods reserved in your Basket:

1. Go to **Sales Process > Sales Order > Goods available for sale**
2. Press **Create Sales Order**
3. Update parameters of the **Sales Order** if necessary
4. Click on button to see from where the supply is reserved.
5. Check required **Quantity to ship** and **Sales price** and press **Confirm** button To create Sales Order
6. If Customer has to pay before releasing goods, press button **Confirm and Proforma invoice**

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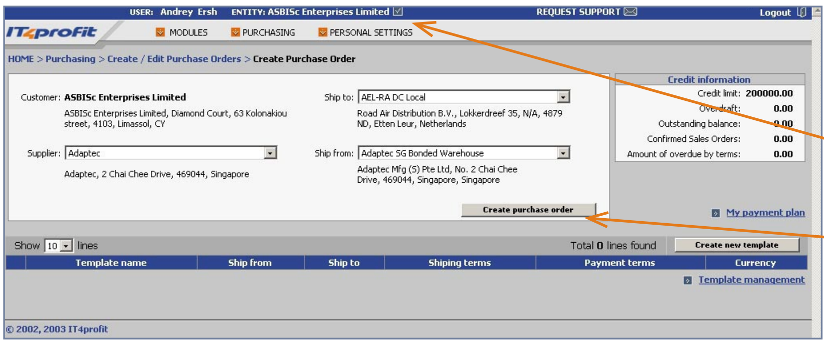

Create PO on behalf of customer

To send order offline for goods not available on stock

1. Go to **Purchasing > Create/ Edit Purchase Order > Create Purchase Order**
2. Click on the **Entity** in the header to Select the Company on behalf of which you want to create PO. In the pop up window double click on the selected **Company.**
3. Select **Supplier**, **Ship to** and **Ship from** address then press **Create Purchase Order**
4. Set **General information**, **Payment parameters** and **Shipment terms and** add required items
5. Set other product **Condition** and press **Save & Send purchase order**

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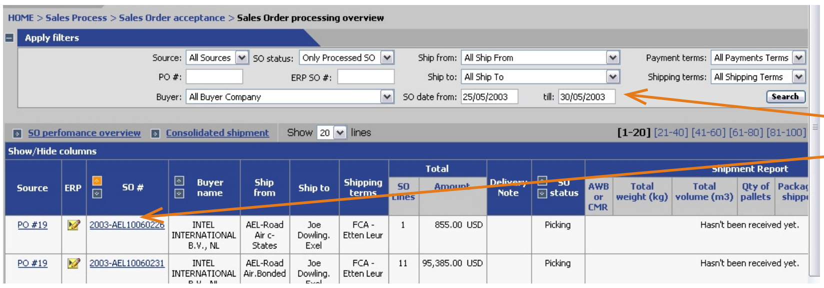

Monitor/ Edit Sales order

1. Go to **Sales Process > Sales Order acceptance > Sales Order processing overview**
2. Apply filters and search for required Sales Order
3. To update Sales Order click on **SO #**

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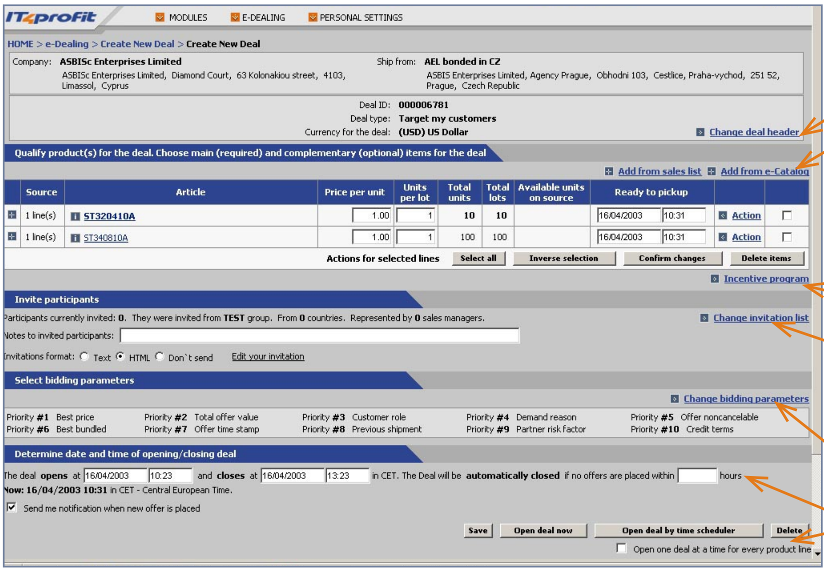

Create Deal

1. Go to **e-Dealing > Create New Deal**
2. Set deal parameters and press **Create Deal** button
3. To qualify products click **Add from e-catalog** link. Select **Type of catalog**, **Manufacturer**, **Product type** and press **Search** button. Set product **Quantity**, **Price**, **Units per lot**, **Total Units**, **Ready to pick up time** and **Supply Source**. Press **Add lines** button.
4. Click on **Incentive program** link, define prize and press **Save** button
5. Click on **Change invitation list** to invite customers. Select **Merchants**, **Targeted market segment**, **Groups of customers**, **Bidders** and press **Confirm and go back**
6. Click on **Change Bidding parameters** link, set parameters and press **Save and go back**
7. Determine **Date and Time of opening/ closing deal**. Define **deal notification** and press **Open deal** button

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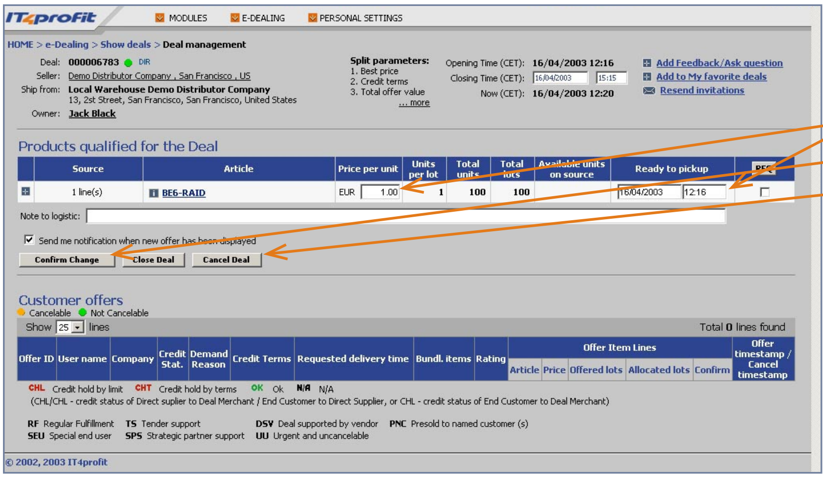

Change Deal parameters

1. Go to **e-Dealing > Show Deals**
2. Choose deal and click on **Type** of deal
3. If required, define new **Price** and **pick up** time
4. Press **Confirm Change** button
5. If you want close deal before defined time press **Close deal** button, to cancel deal press **Cancel deal** button

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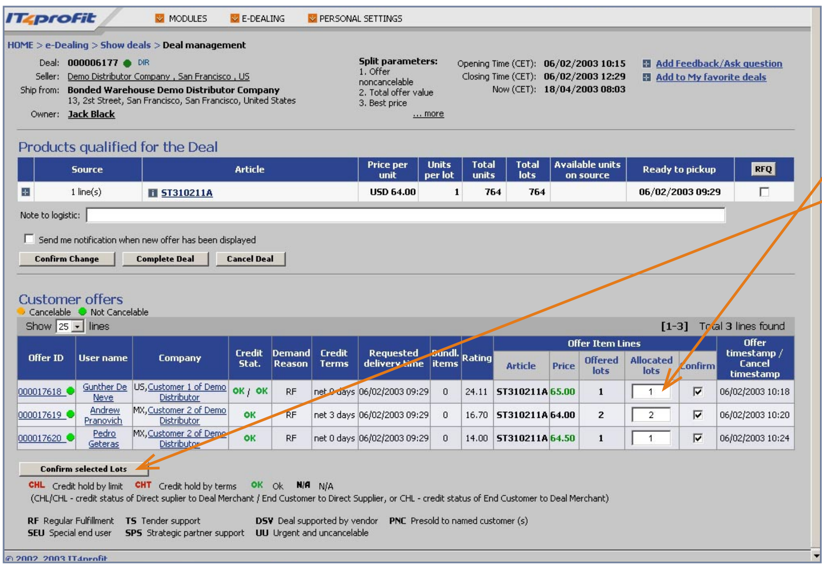

Confirm offers and all lots

1. Go to **e-Dealing > Show Deals**
2. Choose deal and click on **Type** of deal
3. Enter number of **Allocated lots** and check **Confirm** for each winner company
4. Press **Confirm selected Lots** button to create Purchase Order for selected companies

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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 Is the starting point for any operation at IT4profit B2B Exchange. Catalog defines and organizes rich detailed content about all products and services offered at the exchange. It allows to manage wish lists and to distribute product information to multiple business channels. By massively organizing and showcasing sellers’ product catalogs and enabling point-to-point connections to these catalogs, items can be purchased and collected for delivery immediately.

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.

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

SALES ORDER The basic back-end document for order fulfillment. Seller is able to overview the statuses of both Purchase and corresponding Sales orders.

SALES ORDER PROCESSING The module organizes and optimizes seller’s activity on sales orders processing and fulfillment. With the back-end integration the module enables companies to conduct control over financial options, real-time inventory updates, and share orders between IT4profit and accounting systems.

PRICE NEGOTIATION Allows Buyer and Supplier to negotiate prices for each item in the existing Purchase Order.

DEAL The proposal made by deal organizer to invited participants. Both seller-driven and buyer-driven deals can be organized.

E-DEALING e-Dealing is developed to intelligently balance supply and demand and allows business partners to deal on real market price determining their priorities to each deal by multiple business parameters.