Business Relation Administration

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Business Relation Administration

1 Part 1: Self-administration of business relations as buyer

As a buyer you can request business relations directly with suppliers. New business relations will have the status “Pending” until the supplier accepts it.

1.1 Adding a partner

As administrator you can manage the settings under Administration => Partners. In order to add a new partner, open the menu +Add Partner and you can search for a desired partner by filling in some of the following information: Supplier name, TecCom ID, City, ZIP Code or Country.

By clicking +Add in the results list the partner will be added to your partner list. If a partner in the list is already your partner, you see a hint in the Status column.

In the next step you enter the buyer and supplier number:

- Buyer number: The number you received from your partner. If you have not yet received a buyer number, choose any number.
• Supplier number: You can use the number out of your ERP system. Alternatively, choose any number (recommendation: use different numbers for each partner).

Finally, to send your business relation request to the partner, click the Save button. From this point your business relation awaits approval from the supplier. As soon as the supplier activates it, your business relation is active, and your new partner is available for requests and orders.

1.2 Administering the business relations

In the list “Current Partners” you can see and select your partners to administrate them. The yellow warning symbol informs you that there are pending business relations that haven’t been accepted yet by the supplier.

If you select a partner from the list, the partner information is being displayed and you can select a rank (= ordering position) and/or a default ship-to address (optional).
In the tab “Business Relations” you can see the details and status of your business relation. After a business relation has been activated by the supplier, you can edit it here.

1.3 Administering delivery numbers

The following information is relevant only if you work with Ship-to addresses. For advanced users, Order Manager also supports invoice number handling.

- Ship-to address (= delivery address): When placing an order, the goods will usually be sent to your company address. If you want the goods to be sent to a different location, you can store it in Order Manager and send it in your order to the supplier. Please note that not all suppliers support this workflow.

If a supplier supports Ship-to addresses, there are three different scenarios regarding Ship-to numbers (=delivery numbers).

- Delivery number (= Ship-to number): A delivery number is a number associated to a specific delivery address used to identify it. Usually your supplier will provide you with one delivery number per address.

1.3.1 Scenario A: Any delivery number is accepted

For most suppliers, the delivery number handling is “optional”, i.e. you can setup any delivery number (provided by supplier) you like and associate it to a Ship-to address.
1.3.2 Scenario B: Only specific delivery numbers are accepted

For some suppliers, the delivery number is “mandatory”, i.e. only a specific set of delivery numbers is allowed and has to be requested and accepted. In this case each delivery number has its own status. You can add up to 5 entries with different delivery party and invoice numbers with the status pending at the same time. Each entry has to have a unique number combination.

1.3.3 Scenario C: Use of delivery numbers is not allowed

Some suppliers don’t support the use of delivery numbers. However, Ship-to addresses (without number) are accepted. To confirm your actions in any scenario click Save.

Please note

⚠️ The option to associate Ship-to numbers to addresses in the partner administration replaces the previous possibility via “Administration > Ship-To”.
1.4 Impact on Request & Order

In “Request & Order => New Request or Order”, the Supplier dropdown list contains only business relations with the status “active”.

1.4.1 Step 1: Select a supplier from the dropdown list

In order to specify the supplier for your request/order, please select the partner from the dropdown list. If the supplier is listed more than once, please decide for the desired business relation based on the buyer and delivery number (following the “/” character).

1.4.2 Step 2 (optional): Select a Ship-to address in the section “Ship-to”

If you want the goods to be delivered to a location different from your company’s address, you have the option to enter the delivery address in the fields inside the section “Ship-to”. If you want to use an address regularly, you can ask your administrator to store it in Order Manager permanently. Then it will be selectable in the dropdown list.

1.4.3 Possible cases regarding delivery numbers / IFD import / default Ship-to (Information for advanced users)

There are three different cases regarding delivery numbers:

- If the selected business relation has optional delivery numbers, all ship-tos are available for selection from the ship-to list.
- If the selected business relation has mandatory delivery numbers, then the only selectable ship-tos are the ones that have a corresponding delivery number and the ship-to number input is filled and read-only.
- If the selected business relation has not allowed delivery numbers, then the only selectable ship-tos are the ones without a delivery number and the ship-to number input is read-only.

When an IFD file is imported, the temporary ship-to from the file can be used if:

- the selected supplier has optional delivery numbers
- the selected supplier has mandatory delivery numbers, and the ship-to number matches the value
- the selected supplier has not allowed Delivery Numbers and the ship-to number is empty

For the following combinations the IFD file import is rejected:

- the selected supplier has not allowed delivery numbers and the ship-to has a number
- the selected supplier has mandatory delivery numbers and the ship-to number does not match the value

When selecting or switching suppliers a default ship-to is available in the following cases:

- If the selected supplier has optional delivery numbers, the default ship-to will be selected
- If the selected supplier has not allowed delivery numbers, the default ship-to will be selected if its number is empty
1.5 Various scenarios for adding business relations

1.5.1 A. You know your partner, already received a customer number and want to set up a business relation

First, you search for your partner and then fill out the buyer and supplier number. If the buyer initiates the relation, the status is “Pending” and the supplier has to accept the business relation, only then it is active. If the supplier initiates the business relation, it is immediately active.

1.5.2 B. As a buyer, you want to set up a business relation to a supplier (from which you are not a customer yet)

First, you search for the partner and fill out any buyer and supplier numbers. The supplier has to accept the new business relation, until then the state is “Pending”. The supplier will get in touch with you to clarify terms and agree upon a matching buyer and supplier number.

1.5.3 C. As a supplier, you want to set up a business relation to a new buyer

You have the possibility to set up the business relations yourself. This makes the onboarding process for your new buyers faster and facilitates the rollout in new markets or countries. First, please search for the partner and fill out the buyer and supplier number. After saving, the business relation is immediately active.

2 Part 2: Self-administration of business relations as supplier

The new feature “self-administration of business relations” offers several benefits for supplier organizations and greatly improves your options in the partner administration.

You will no longer depend on the TecAlliance customer support to create new business relations, and you’ll have the possibility to set up the business relations by yourself, which are immediately active and directly usable by your buyers in Order Manager. This makes the onboarding process for your new buyers faster and facilitates the rollout in new markets or countries.

Buyers will also have the possibility to request business relations. These will have the status “Pending” until you accept it in Order Manager. To profit from this new business opportunities, please register in Order Manager with your TecCom ID and password and regularly check for newly requested business relations.

Please note: The section “Part 1: Self-administration of business relations as buyer” also contains valuable information for suppliers.

2.1 Adding a partner

As administrator you can manage the settings under Administration => Partners. In order to add a new partner, click +Add Partner and search for a desired partner by filling in some of the following information: Supplier name, TecCom I, City, ZIP Code or Country.
By clicking +Add in the results list the partner will be added to your partner list. If a partner in the list is already your partner, you see a hint in the Status column.

In the next step you enter the buyer and supplier number you agreed upon with your partner. The business relation is immediately active and available for your buyer (for requests and orders). Finally click the Save button.

Please note: Once a partner with business relation(s) was added to Order Manager it can’t be deleted. If you have rejected at least one business relation, it is not possible for this partner to request another business relation.
2.2 Administrating the business relations

In the list “Current Partners” you can see and select your partners to administrate them. The yellow warning symbol informs you that there are pending business relations that haven’t been accepted yet. You need to accept them, so that a buyer can order from you.

If you select a partner from the list, the partner information is being displayed.

In the tab “Business Relations” you can see the details and status of your business relation. After a business relation has been activated, it can be edited here.
You can change the status of the business relation from “Pending” to “Active” or “Rejected”. Active business relations can be set to “Inactive” and vice versa.

To meet the requirements of your ERP system you can select if a delivery number is “optional”, “mandatory” or “not allowed”. The differences are explained in the following chapter “Delivery Number handling”.

Most suppliers accept any delivery number and don’t want it to be checked by Order Manager. This delivery number handling is called “optional”.

Some suppliers accept only a specific set of delivery numbers per buyer. This delivery number handling is called “mandatory”. In this case one business relation per delivery number exists, which then has its own status.

Few suppliers don’t support the use of delivery numbers. However, Ship-to addresses (without number) are accepted.

For advanced users it is also possible to set up business relations with custom invoice numbers.

To confirm your action, click Save.
If your numbers differ from the ones of your partner because they have been changed since the creation, a yellow warning symbol appears. In this case the ordering process is not affected, since Order Manager does the conversion automatically, but to avoid confusion, your numbers should match.

2.3 Delivery Number handling and technical description

There are 3 scenarios regarding the delivery number handling. The technical descriptions are marked in italic and meant as information for advanced users using the Order Manager Portal.

2.3.1 A. “Optional”

Any delivery number is allowed by Order Manager. Order Manager will not check the delivery number sent by the buyer. Only the supplier’s ERP system will check the delivery number.
@TecAlliance: The business relation in Order Manager Portal has the ‘isDeliveryPartyNumberExcluded’ flag set to true and the field ‘deliveryPartyNumber’ is null. The input is disabled.

2.3.2 B. “Mandatory”

Only a specific set of delivery numbers is allowed for buyers in their requests/orders. The delivery number is being checked by Order Manager and must match with a corresponding business relation.
@TecAlliance: The business relation in Order Manager Portal has the ‘isDeliveryPartyNumberExcluded’ flag set to false and the field ‘deliveryPartyNumber’ must have a value. The input is enabled.

2.3.3 C. “Not allowed”

The use of delivery numbers is not allowed. This means the buyer cannot send a delivery number in his requests/orders.
@TecAlliance: The business relation in Order Manager Portal has the ‘isDeliveryPartyNumberExcluded’ flag set to false and the field ‘deliveryPartyNumber’ is an empty string. The input is disabled.
The following image shows, how suppliers have to configure their business relations from now on depending on the buyer scenario:

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Supplier</th>
<th>TecLocal Connect* ≤4.1 (+SAP)</th>
<th>TOMconnect, (+Axapta)</th>
<th>EDI / OFTP / FTP</th>
</tr>
</thead>
<tbody>
<tr>
<td>TecLocal</td>
<td>As usual (TecLocal)</td>
<td>Order Manager</td>
<td>As usual (Customer Support)</td>
<td></td>
</tr>
<tr>
<td>WebService / Order Manager</td>
<td>TecLocal /Connect* &amp; Order Manager</td>
<td>Order Manager</td>
<td>Customer Support &amp; Order Manager</td>
<td></td>
</tr>
</tbody>
</table>

*former TecConnect

“Order Manager”: Suppliers have to administrate (add, accept, reject) the business relations in the online portal of Order Manager.