doxa

doxa connex

# Supplier Portal Guide

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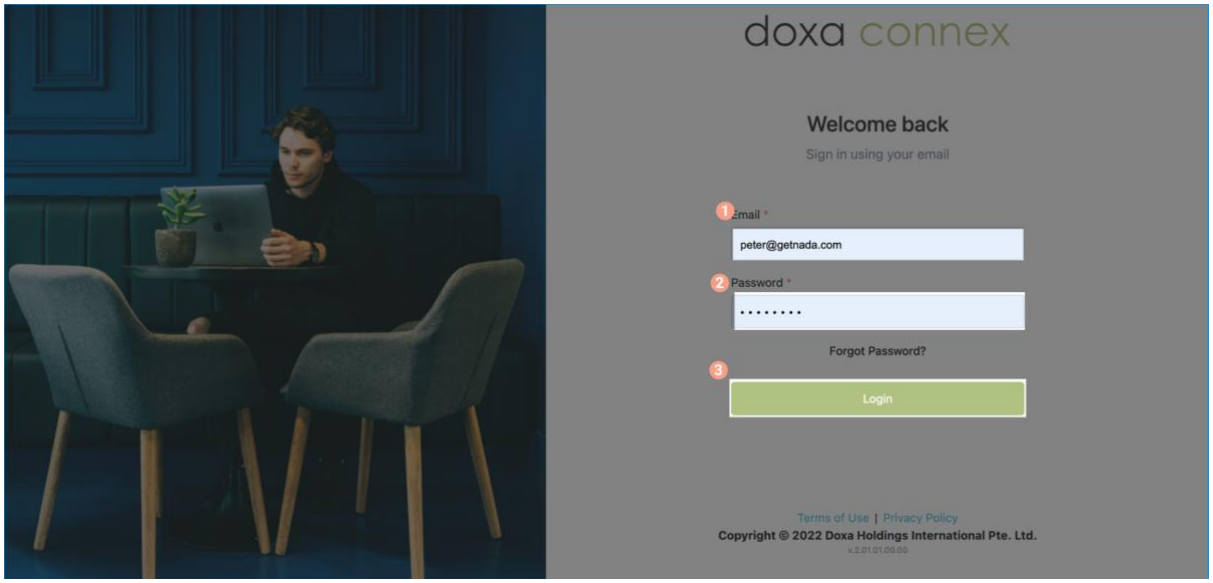
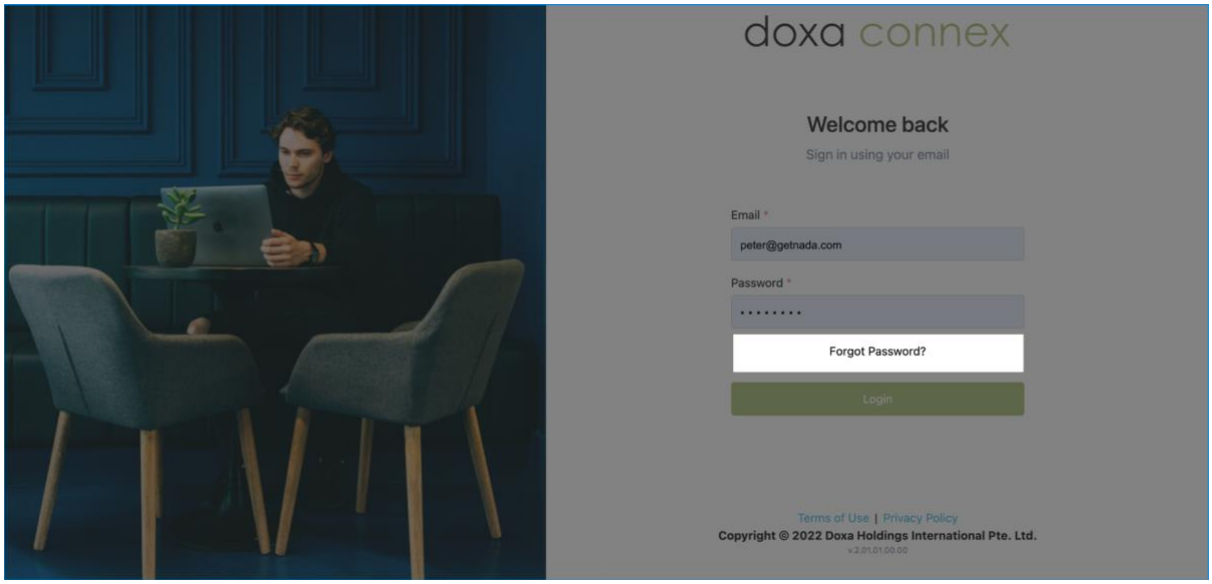
# How to Login to Doxa Connex

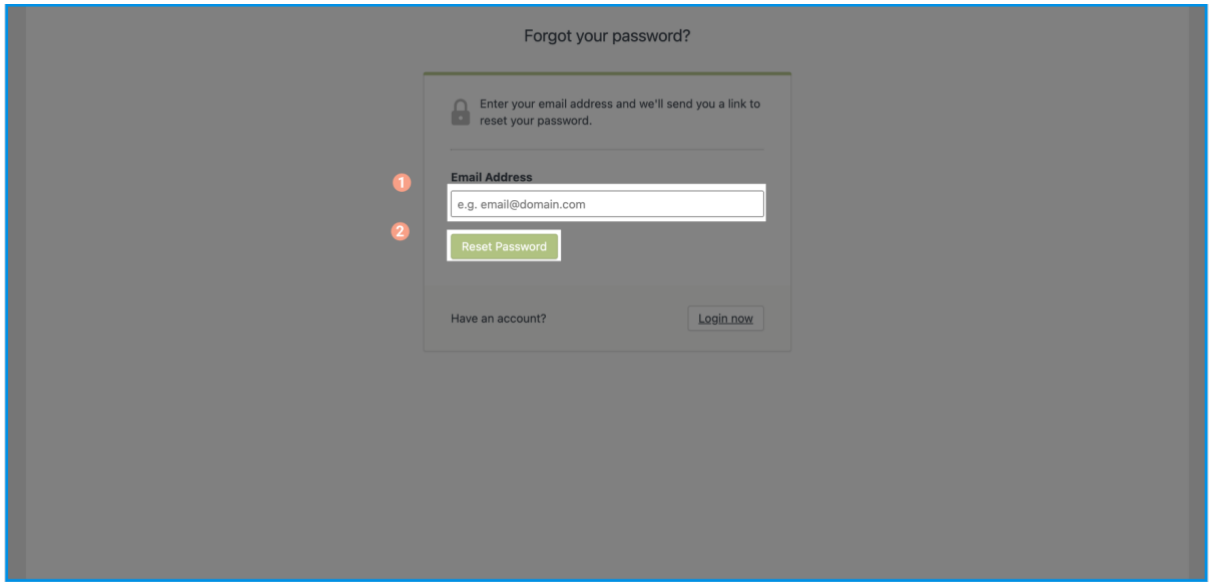



At https://auth.doxa-holdings.com/login
Email: Input your email address
Password: Input your account password (received in the account email from no-reply@doxa-holdings.com)
Click **Login**

# How to Login to Doxa Connex (without password)



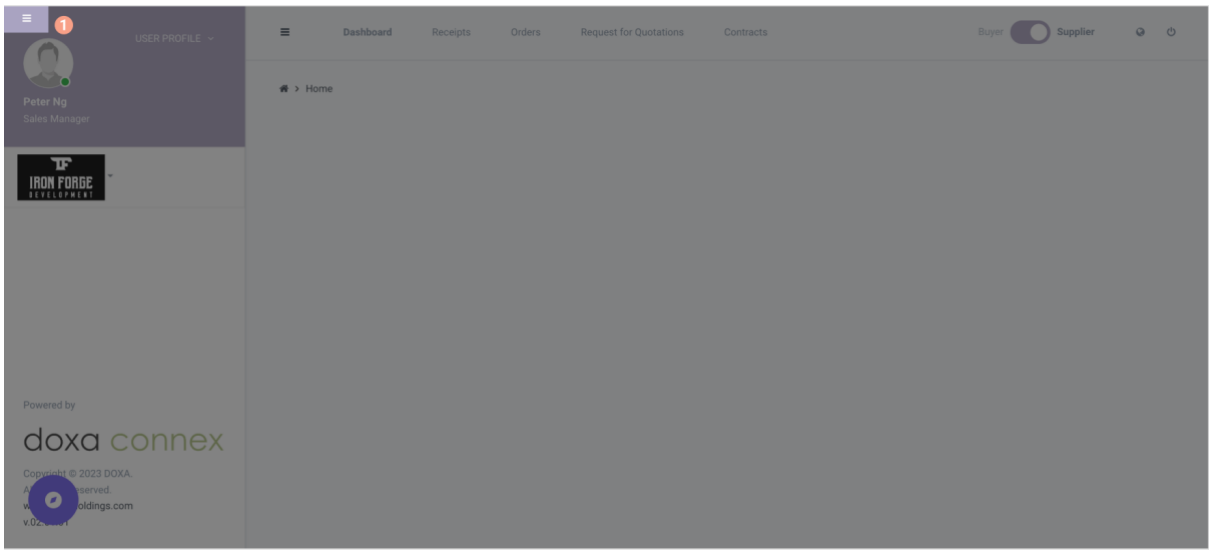

Click **Forgot Password?**



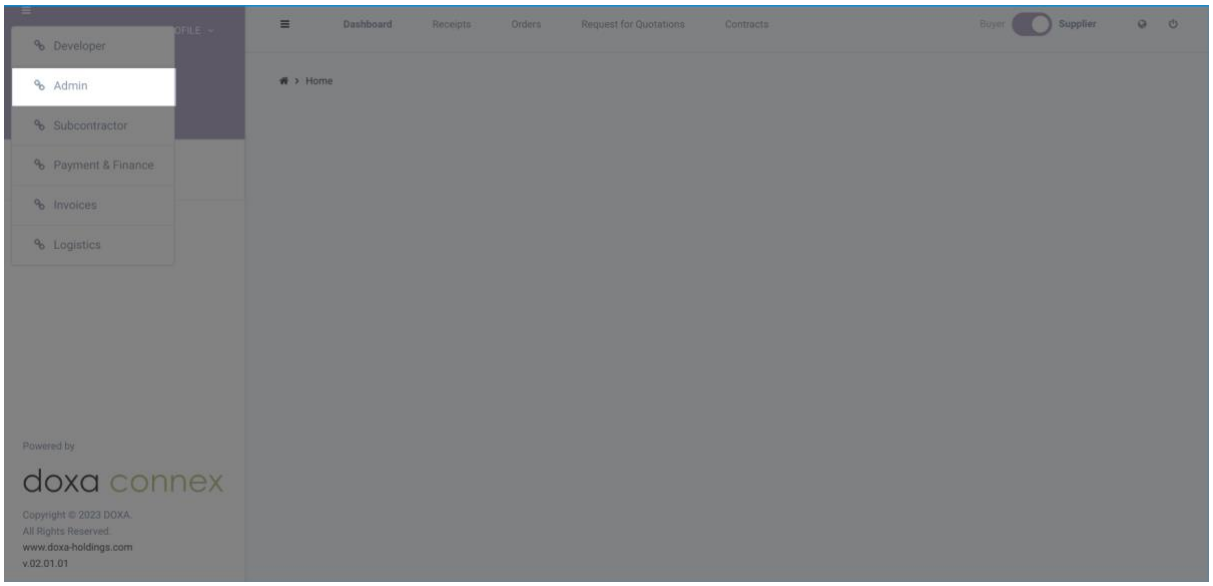

Email Address : Input the email address that is linked to your Doxa account
Click **Reset Password**

You will receive an email with a link to reset your password.
Complete the password reset.

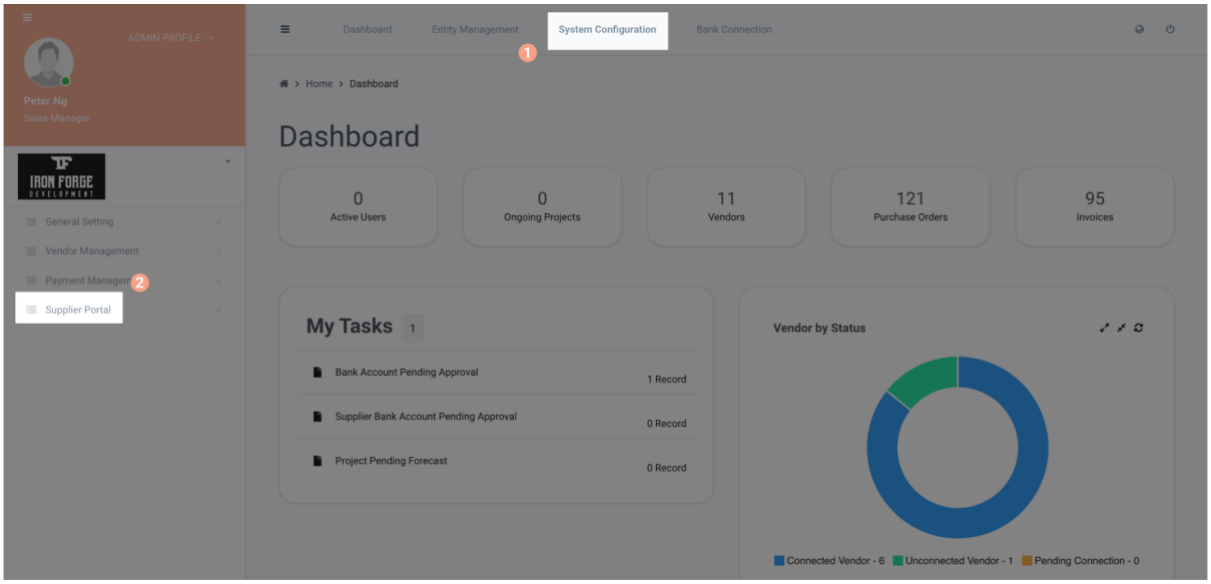
# How to Access Supplier Portal Configuration




Click on the three dashes on the top left

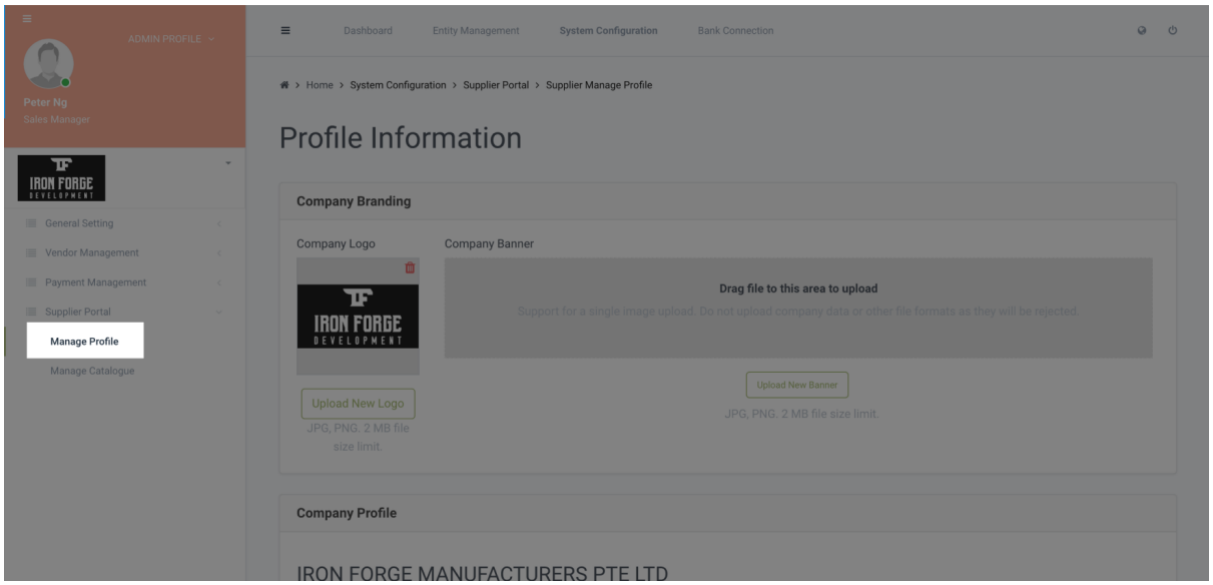



Click **Admin**

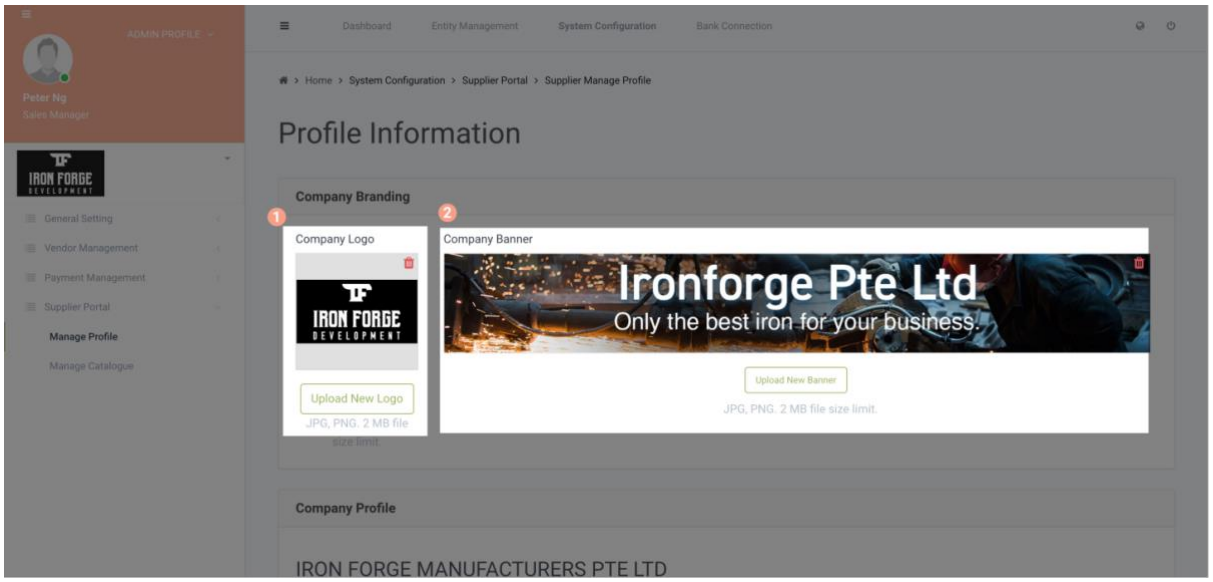



Click **System Configuration**
Click **Supplier Portal**

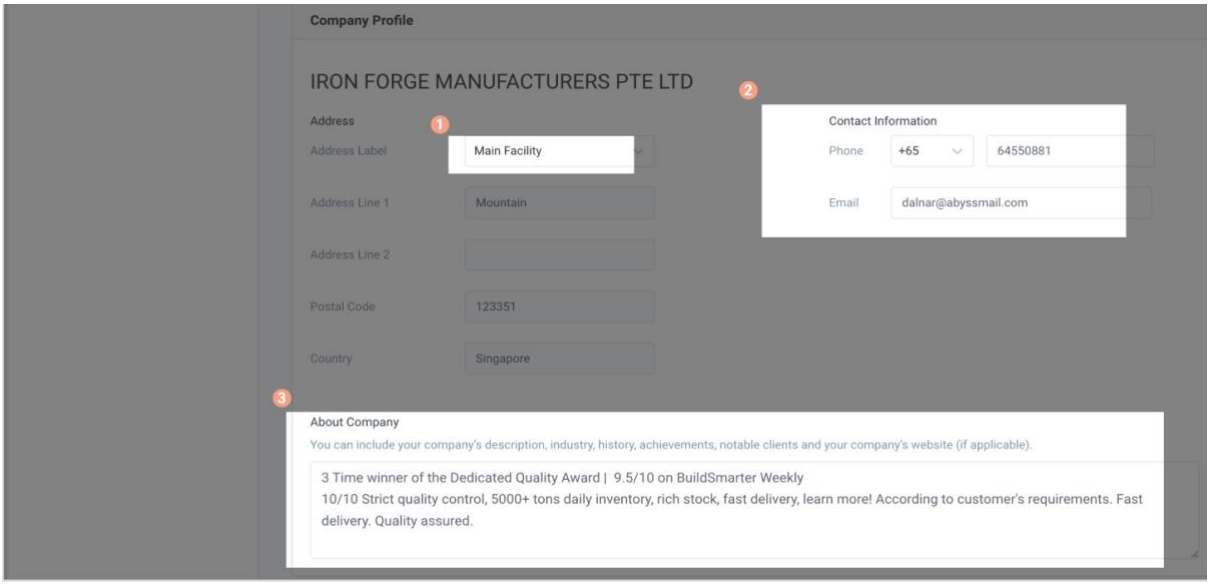
# How to Customize Your Supplier Portal Profile



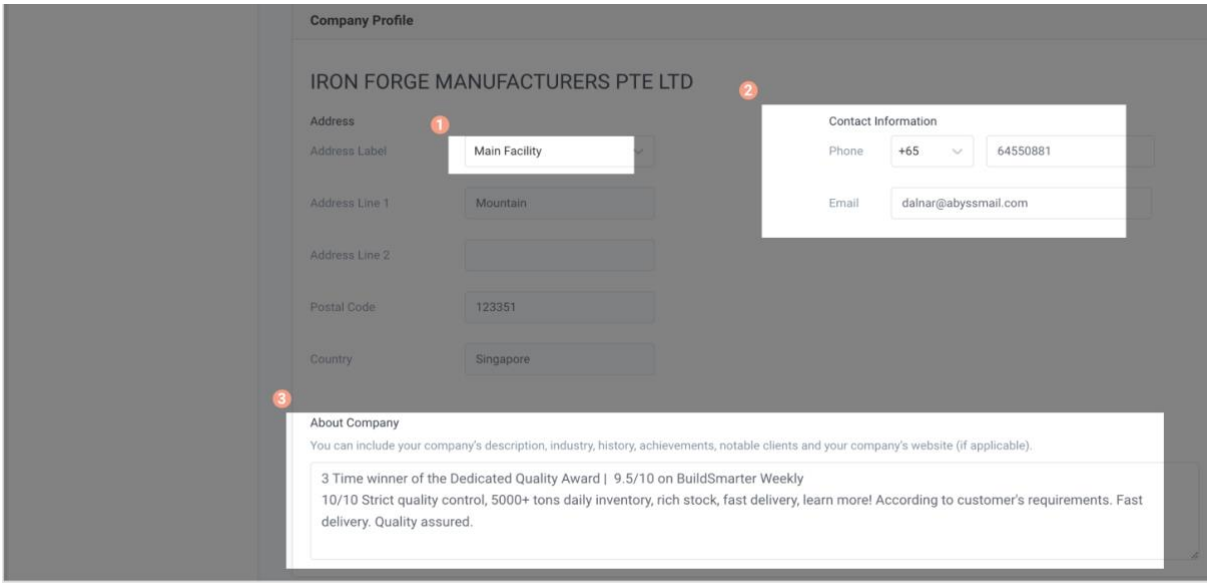

Click **Manage Profile**




Click **Upload New Logo** to upload your own company Logo
Click **Upload New Banner** to upload a custom banner for your profile



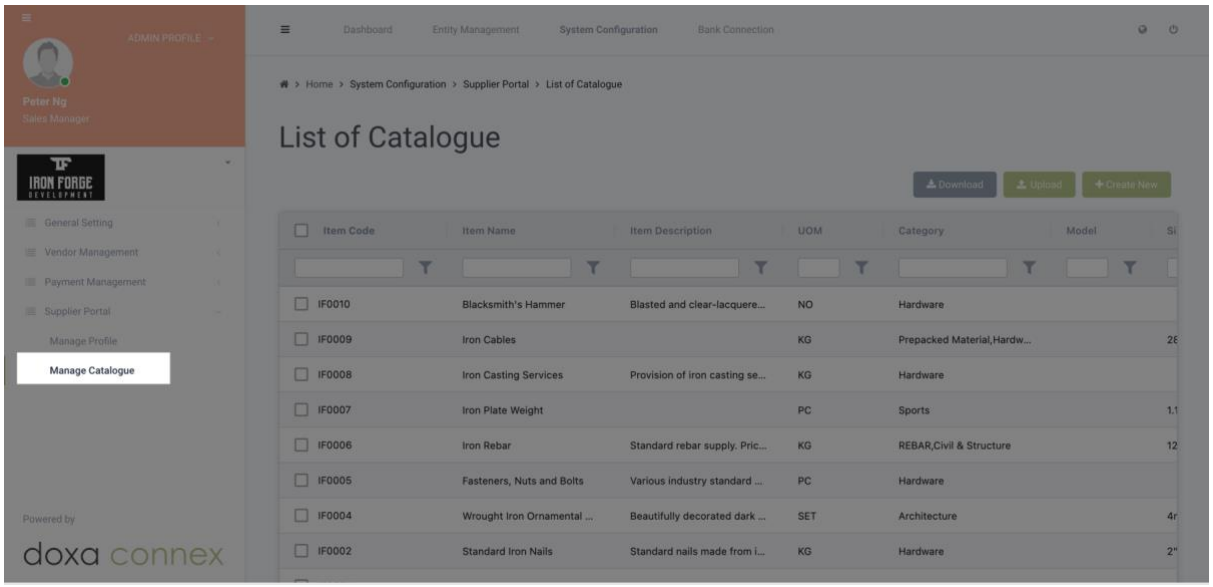

Select your company **Address Label**
Enter your preferred Contact Information
Add a custom description for your company



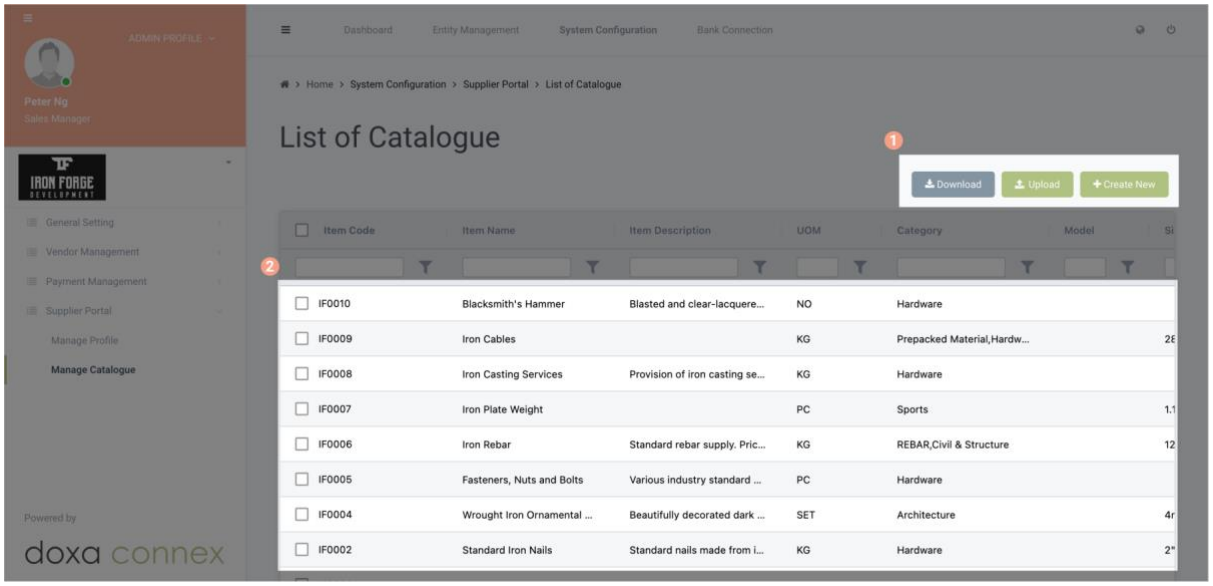

Click Preview to see your supplier profile with the changed details

Click Save to upload the changes to your profile

# How to Manage Your Supplier Portal Catalogue




Click Manage Catalogue

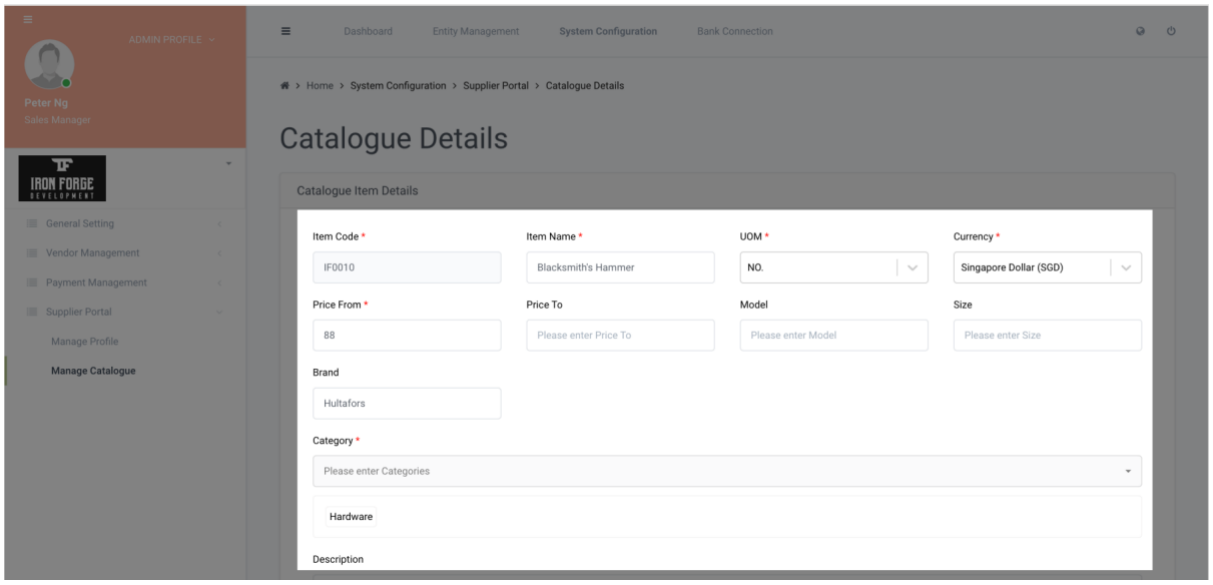



Click Create New to create a new catalogue item

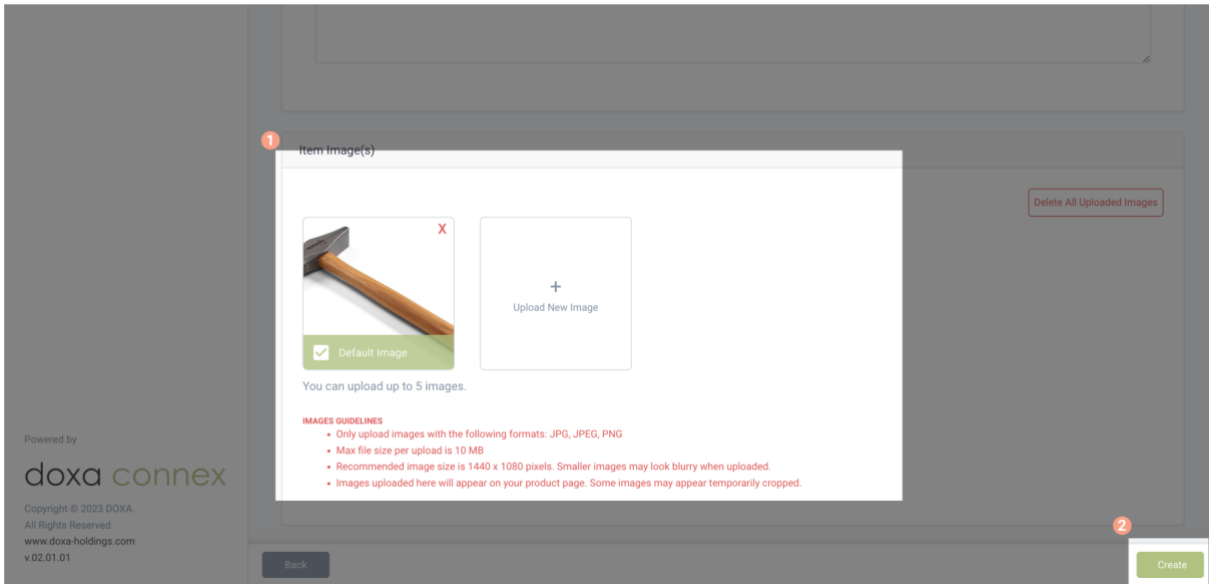
Click Download to download a csv. Export of your catalogue

Click Upload to upload your catalogue via csv. (Upload format same as download)

Your created catalogue items will appear in the table

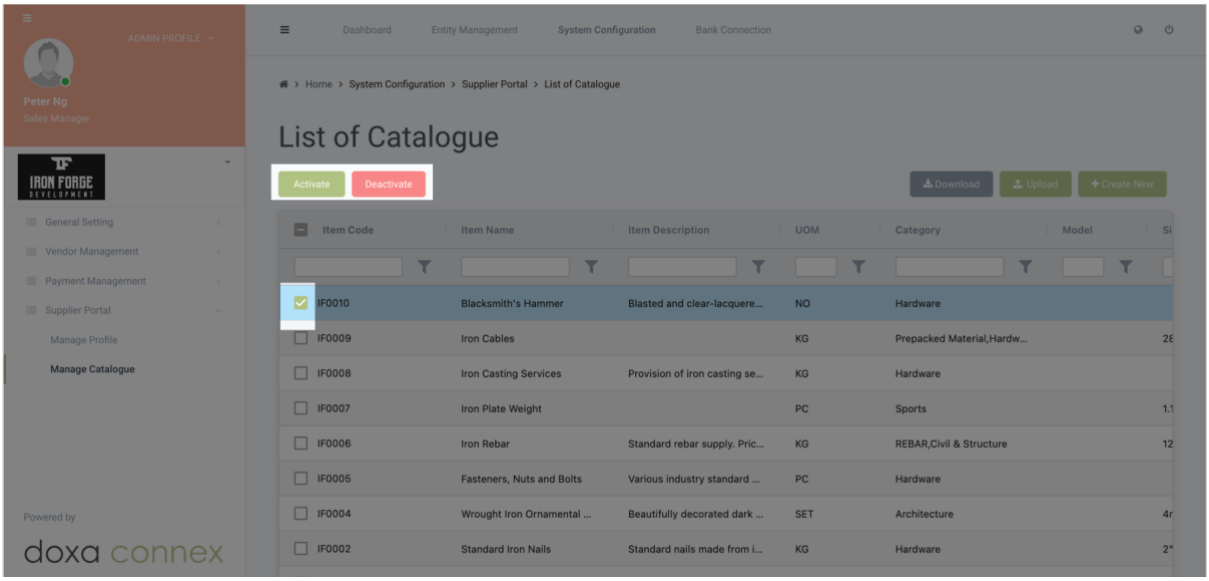



Enter the details of the catalogue item in these fields. (Items with the red * are mandatory)




Click Upload New Image to upload an image and video URL for your catalogue item

Click Create to upload your catalogue item into the Supplier Portal



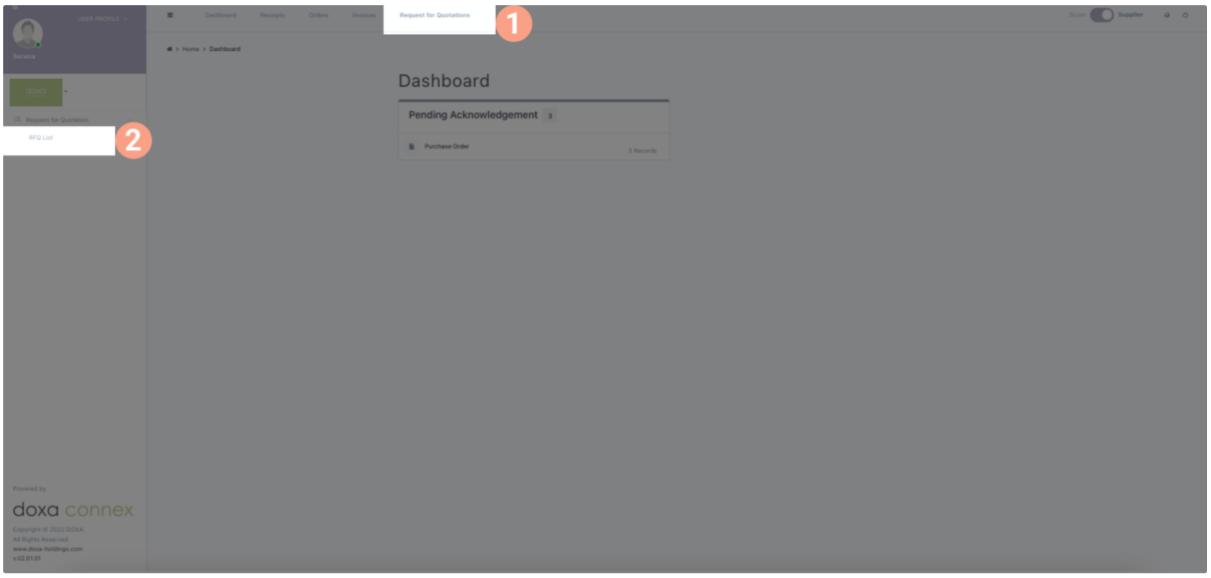

To remove catalogue items from the Supplier portal:

Click the check box on the left of the item name to select the item/s

Click Deactivate to remove items from your supplier portal catalogue

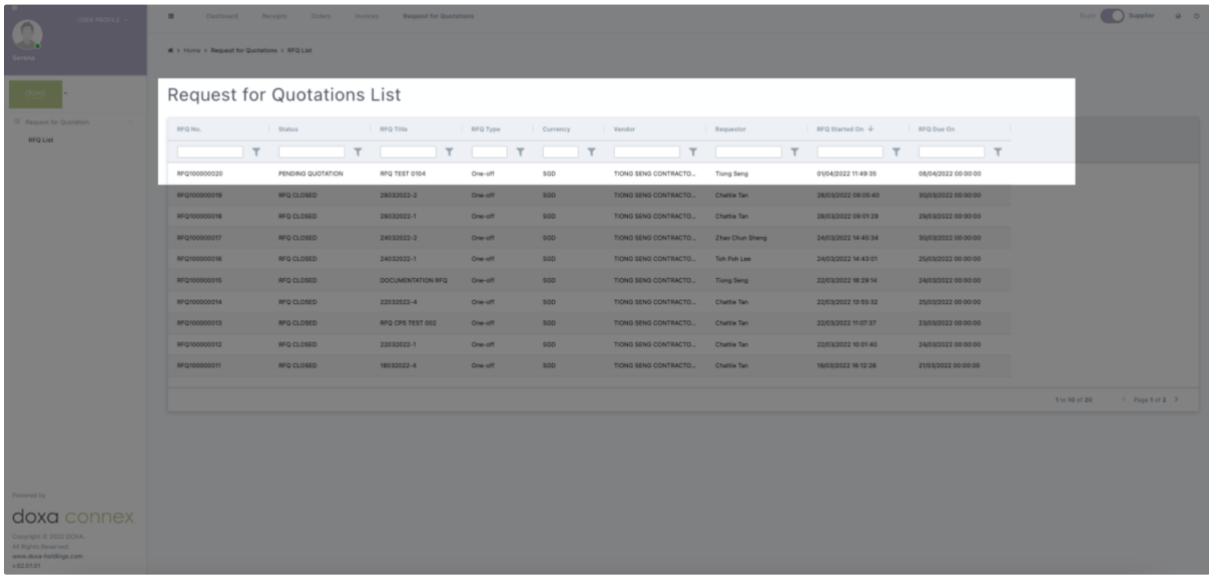
Click Activate to add deactivated items back to the supplier portal catalogue

# How to Respond to a Request for Quotation

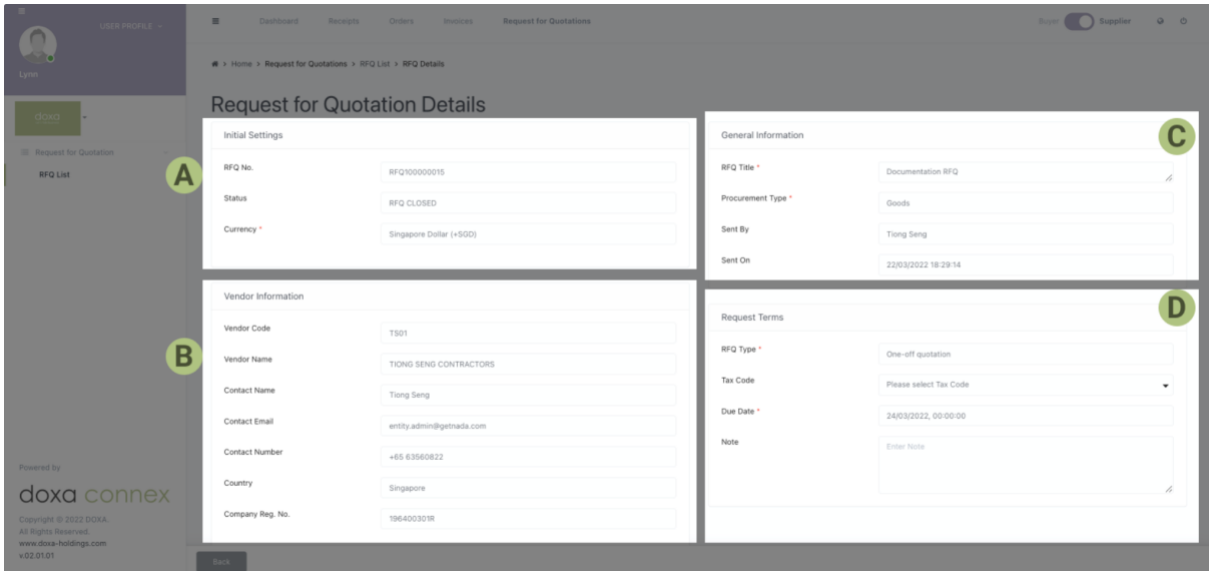



Click on **Request for Quotations**

Click **RFQ List**




You can open the RFQ from the list by double clicking on your selected RFQ.

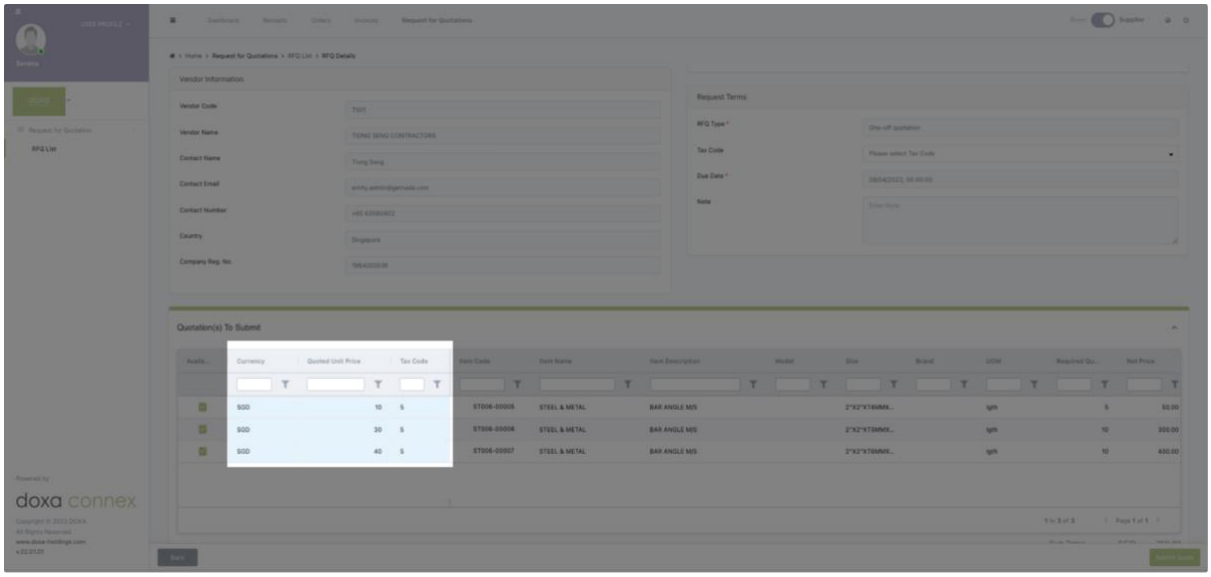



A. Contains the RFQ No. Status and Currency.

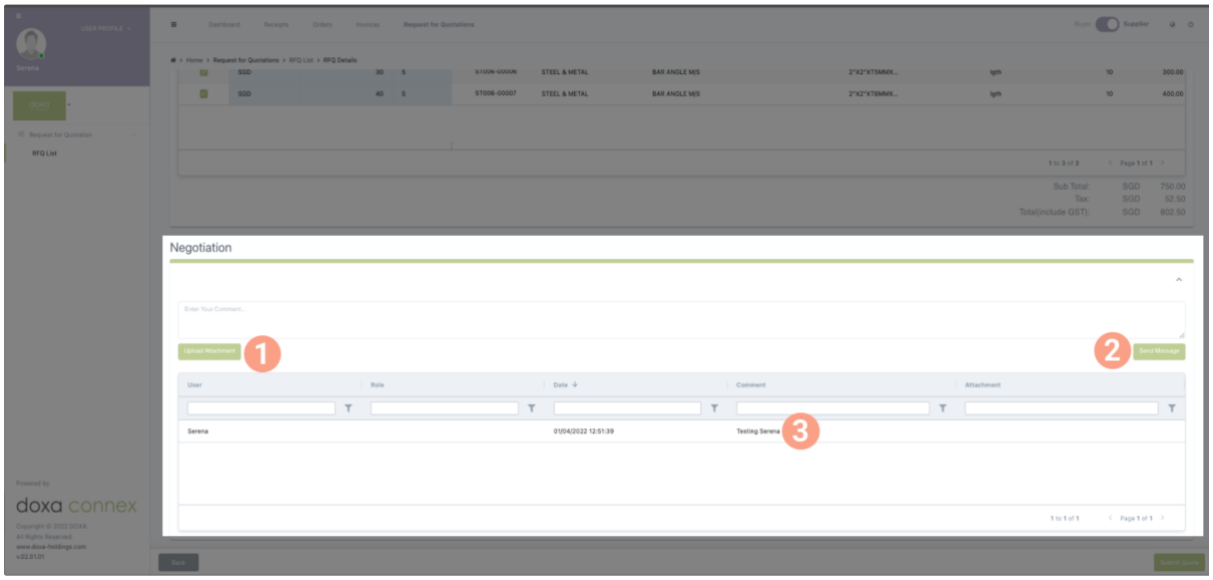
B. Contact Vendor Information.

C. General Information.

D. Request Terms



Supplier enters the **Quoted unit price**.

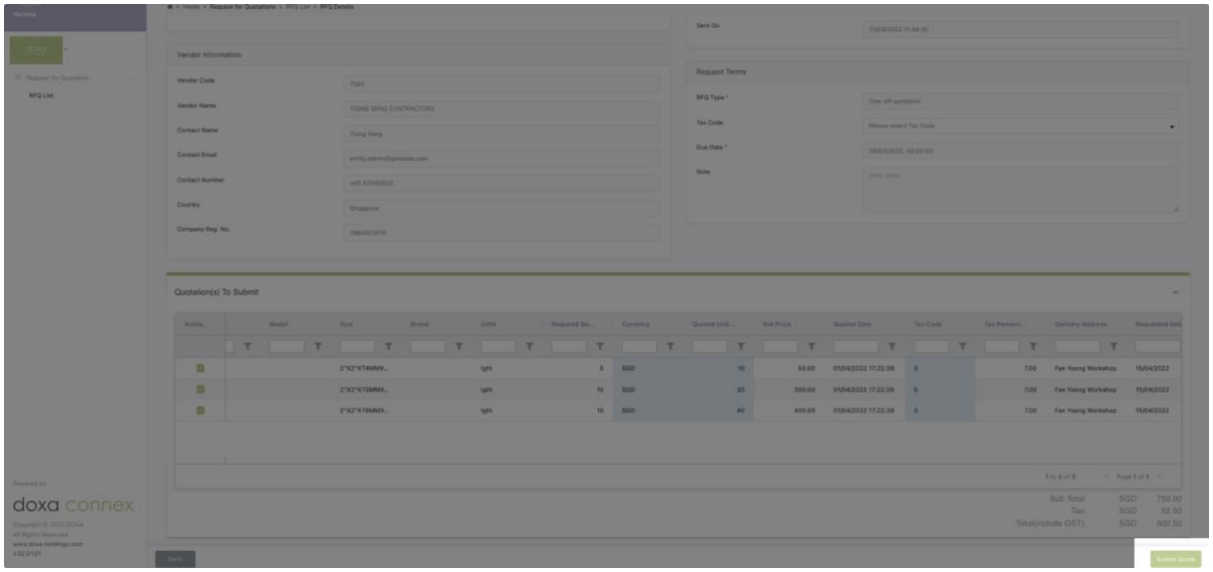



The suppliers can send negotiation message or attachment through the negotiation tab and the buyer can view the attachment and messages.

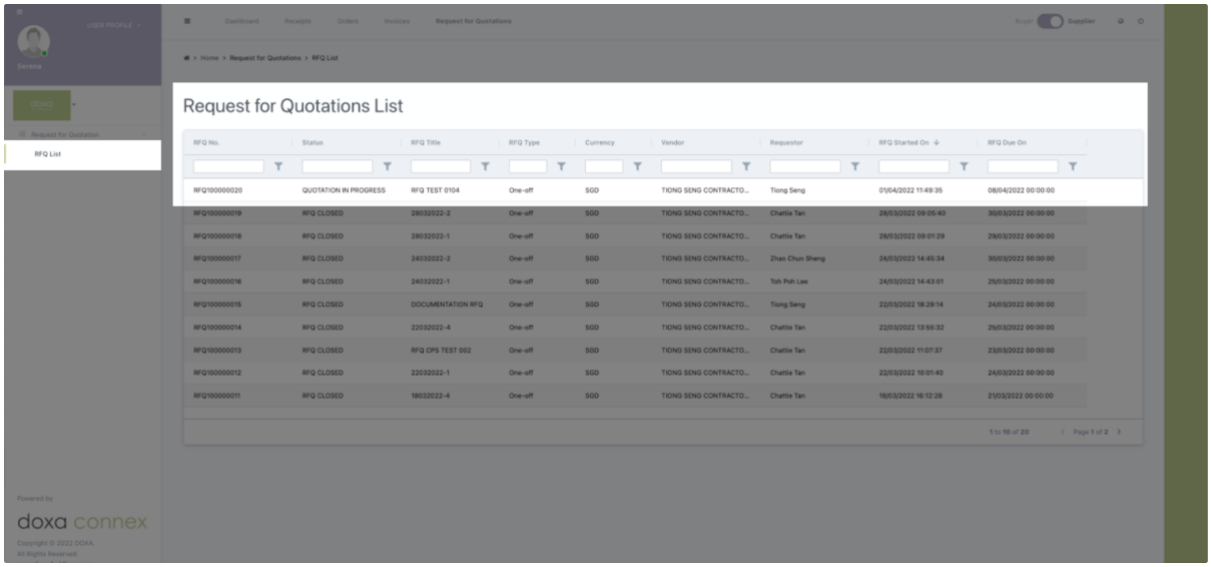
1.Suppliers can upload attachment

2.Suppliers can send a message to the buyer.

3.Suppliers can view the negotiation messages/attachment from the buyer.



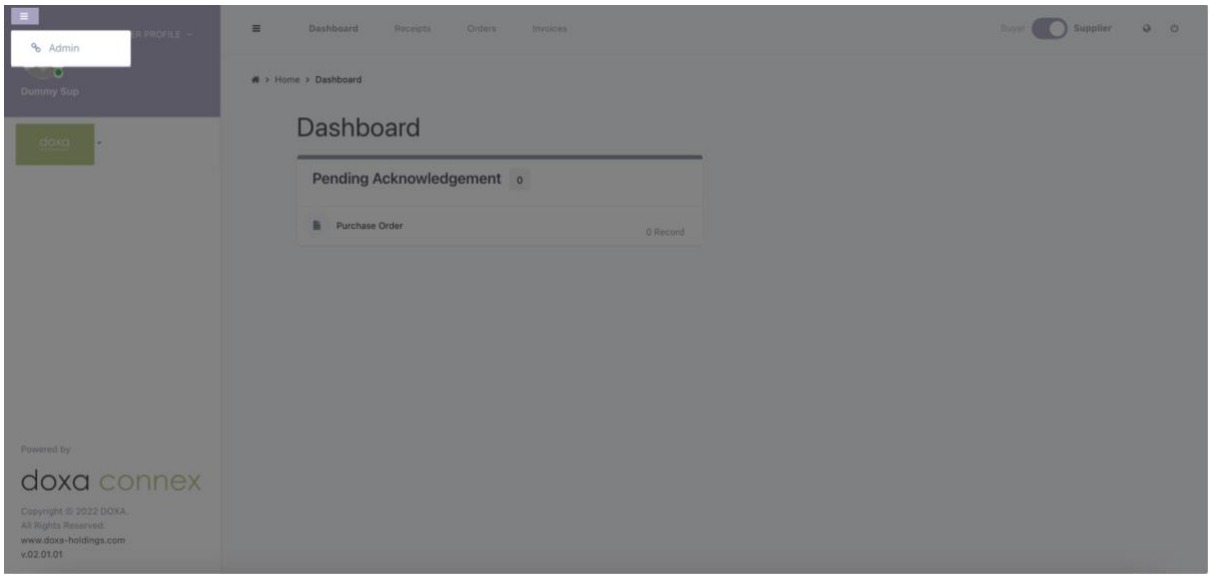
Once the supplier completes the quotation he can click on **Submit**



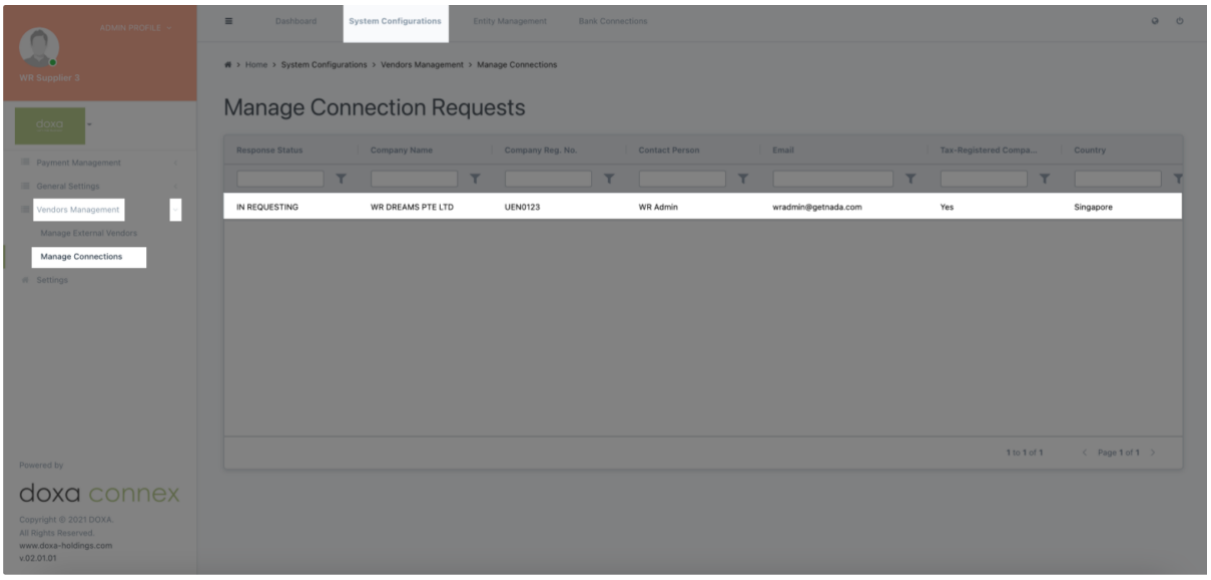

You can view the status of the RFQ in the RFQ List.

The status will update to "RFQ closed" once the buyer completes the shortlisting.

# How to Accept a Connection Request



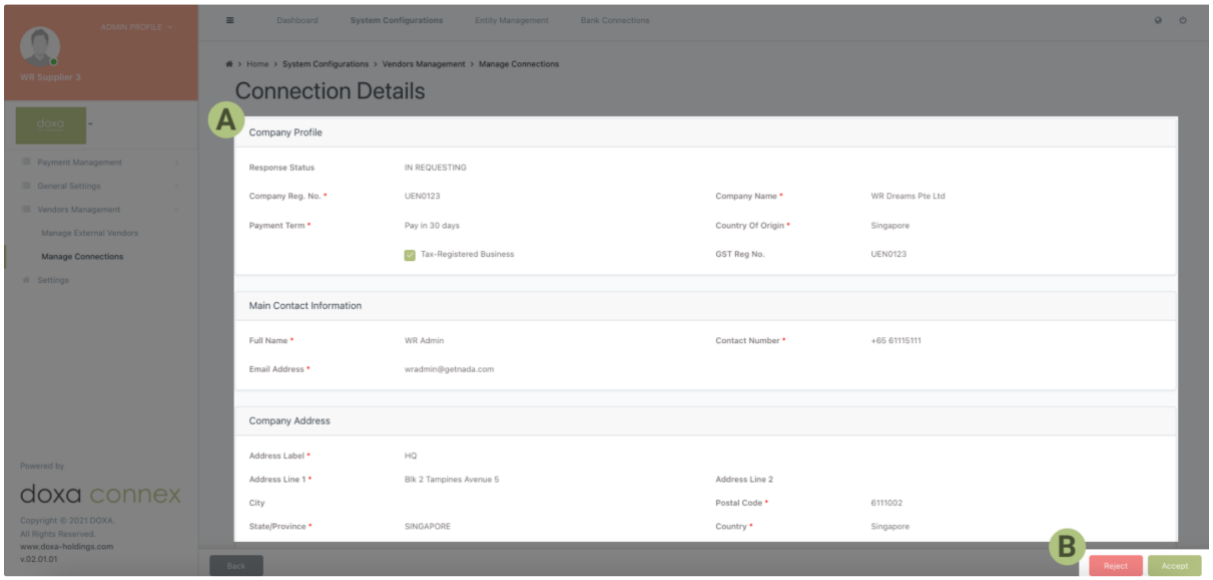

Click on the 3 dashes beside User Profile
Click **Admin**




Supplier will need to accept the Connection Request sent by the Buyer so that Supplier is able to view PO sent by Buyer through Doxa, Create Delivery Order as well as Creating Invoice in Doxa

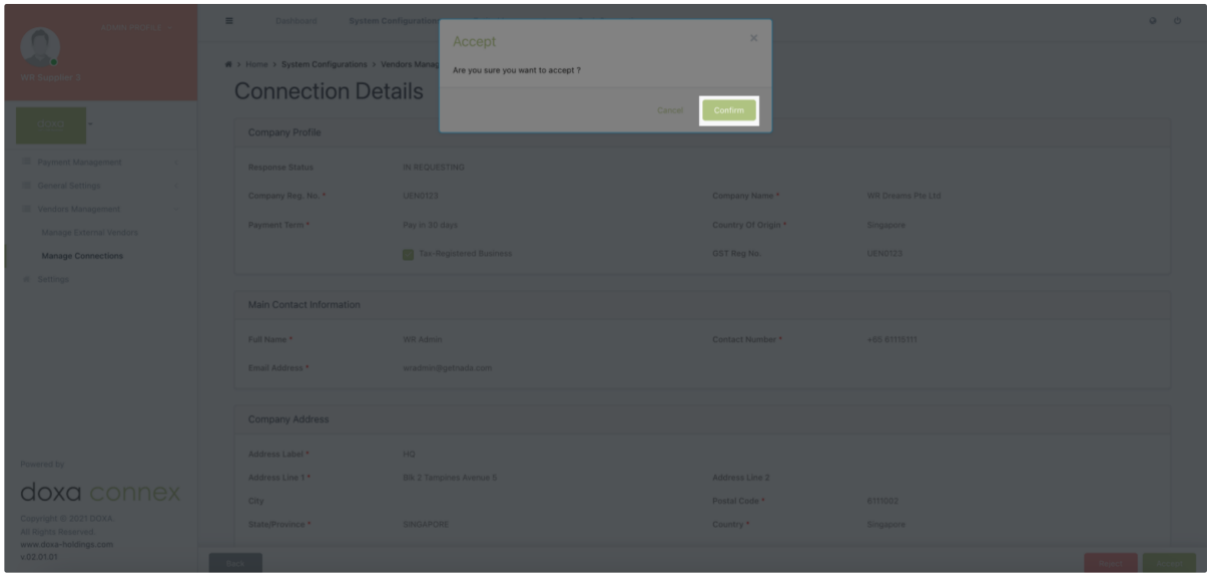
Click **System Configuration**
Click on the small arrow beside **Vendor Management** to expand the dropdown
Click **Manage Connections**

You will see the connection request sent by the Buyer. The status is “IN REQUESTING”
Double click on the Company Name

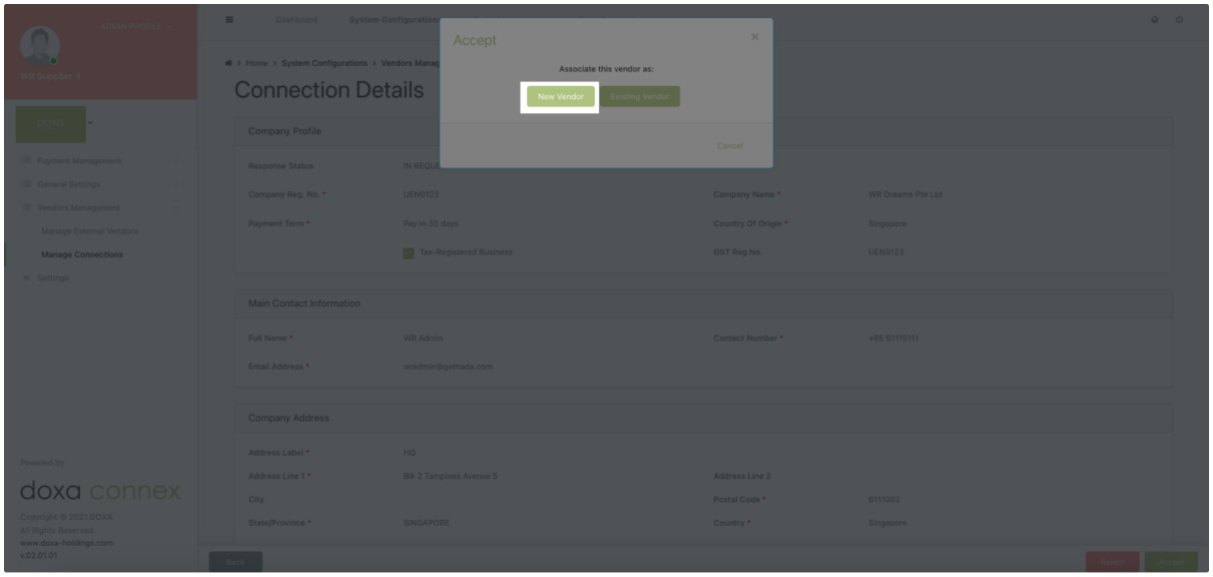



**A: Connection Details**
Information provided are the Buyer's information

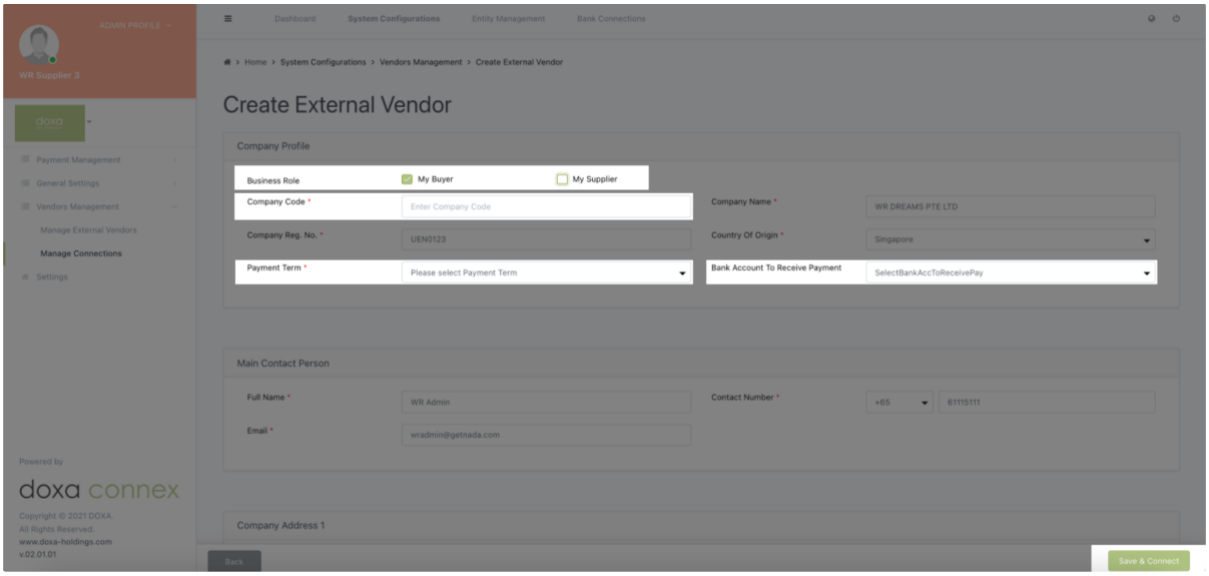
**B: Accept or Reject**
To accept the connection request with the Buyer, click **Accept**




Click **Confirm** to accept the connection request




Click **New Vendor**

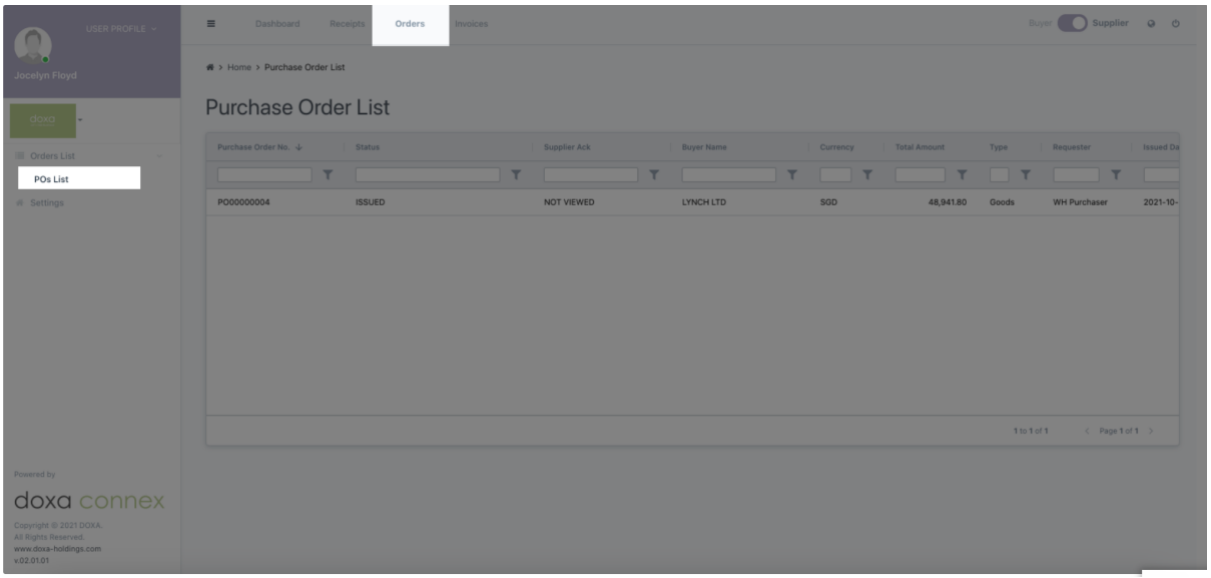



System will auto-generate the Buyer's information

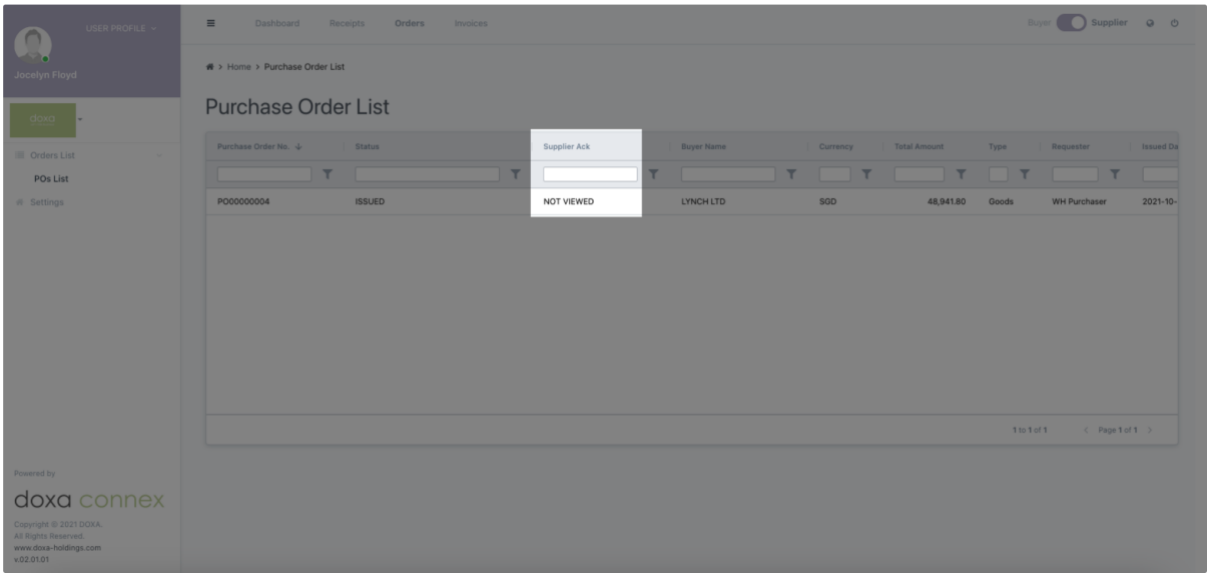
Below are the fields required by the Supplier to take action:
My Supplier: Uncheck
Payment Term: Select Payment Term under the dropdown. This is the Payment Term as agreed between the Buyer and Supplier
Bank Account To Receive Payment (Optional)

Once above information are filled in, click **Save & Connect**

# How to Acknowledge a Purchase Order

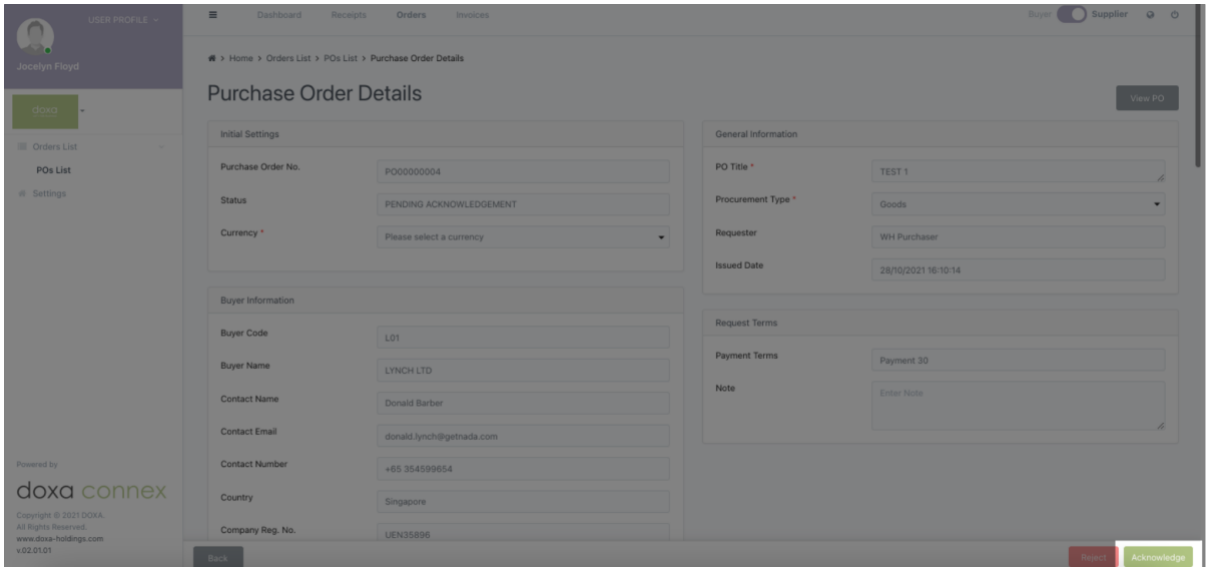



Click **Orders**
Click **POs List**

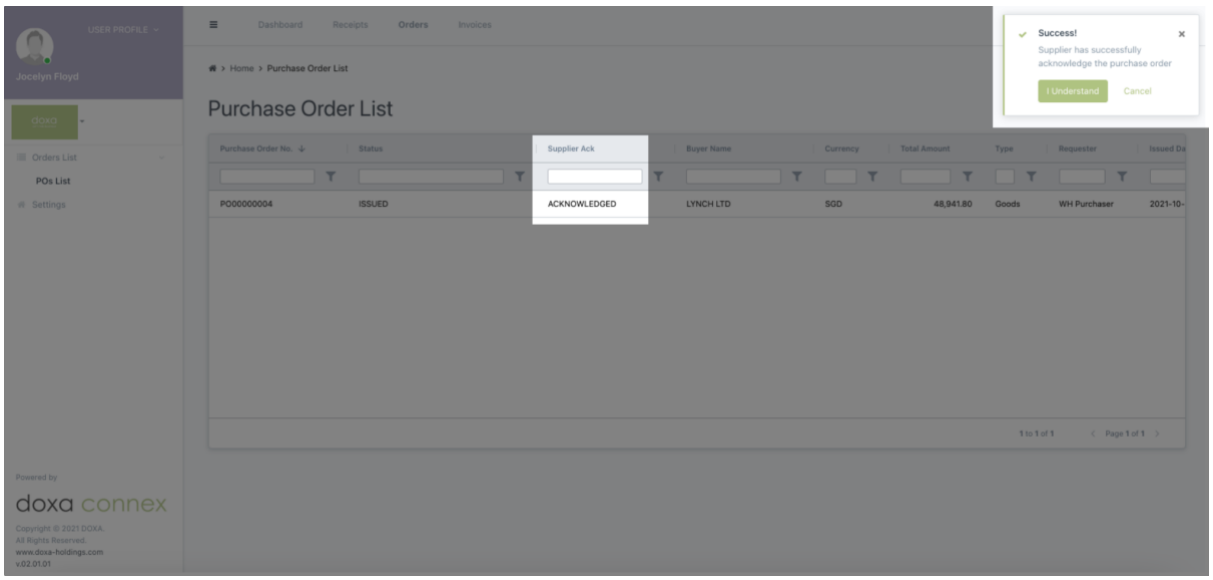



Select the PO which you want to view and acknowledge

Supplier Ack (Supplier Acknowledgement) is “NOT VIEWED”



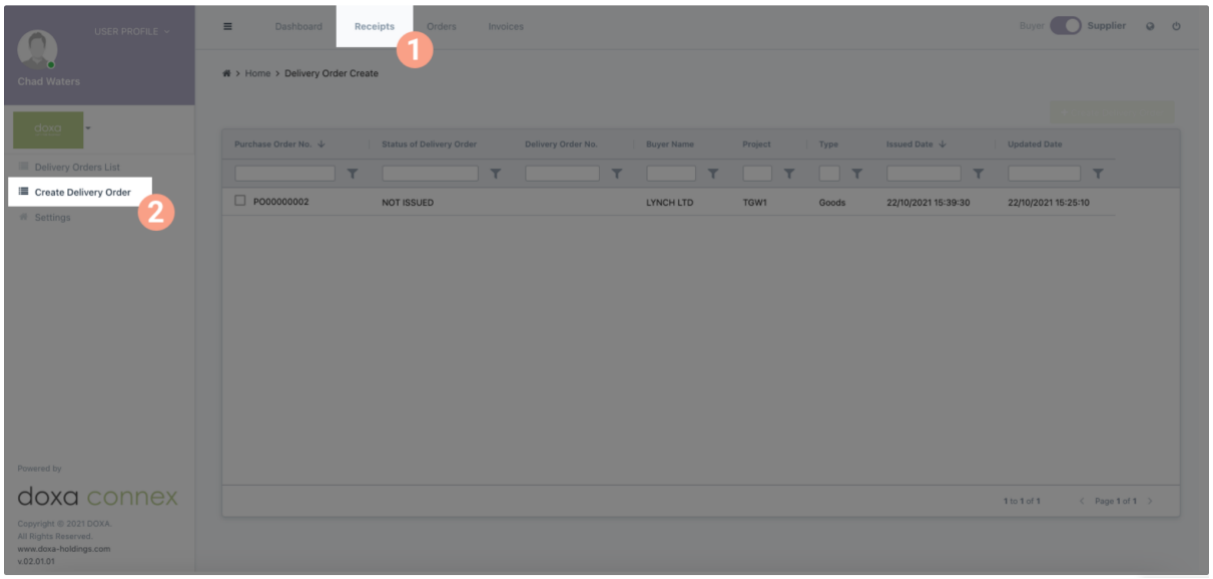

Click on **Acknowledge**




Once PO is acknowledged, there will be a notification button to notify the user that this PO has been successfully acknowledged. User can click “I Understand” or “Cancel”.

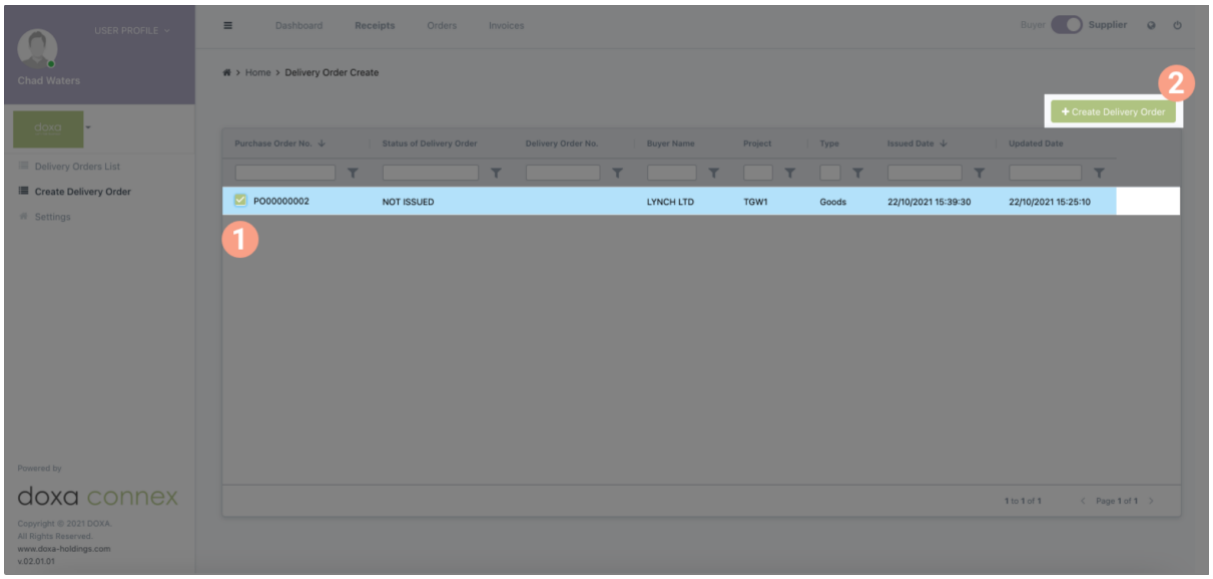
Supplier Ack (Supplier Acknowledge) will change from “NOT VIEWED” to “ACKNOWLEDGED”.

# How to Issue Delivery Order



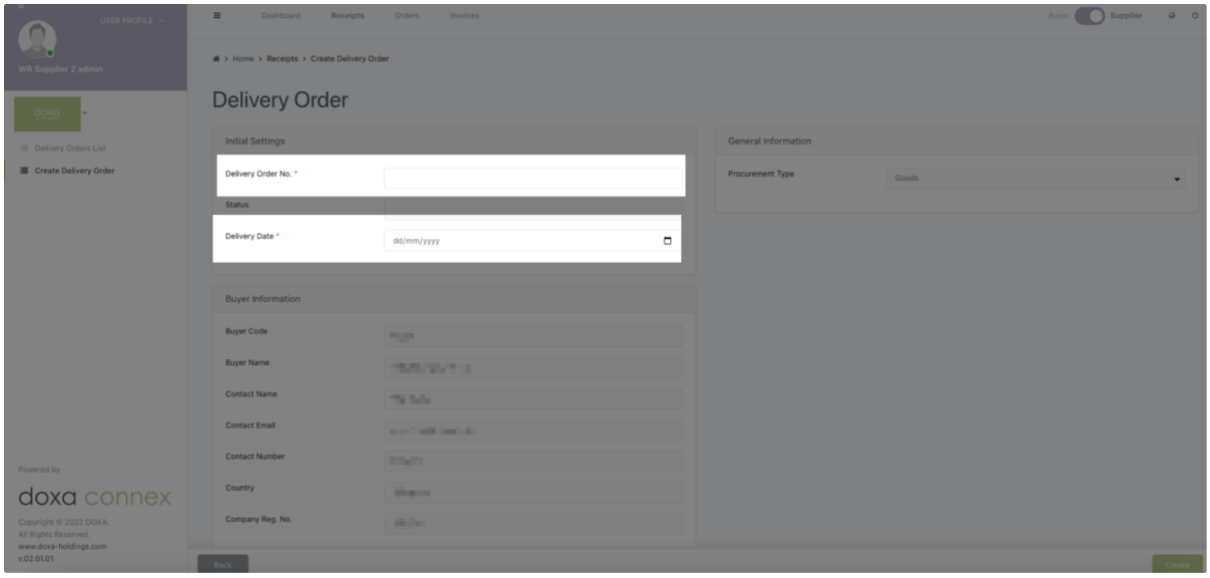

Click **Receipts**

Click **Create Delivery Order**

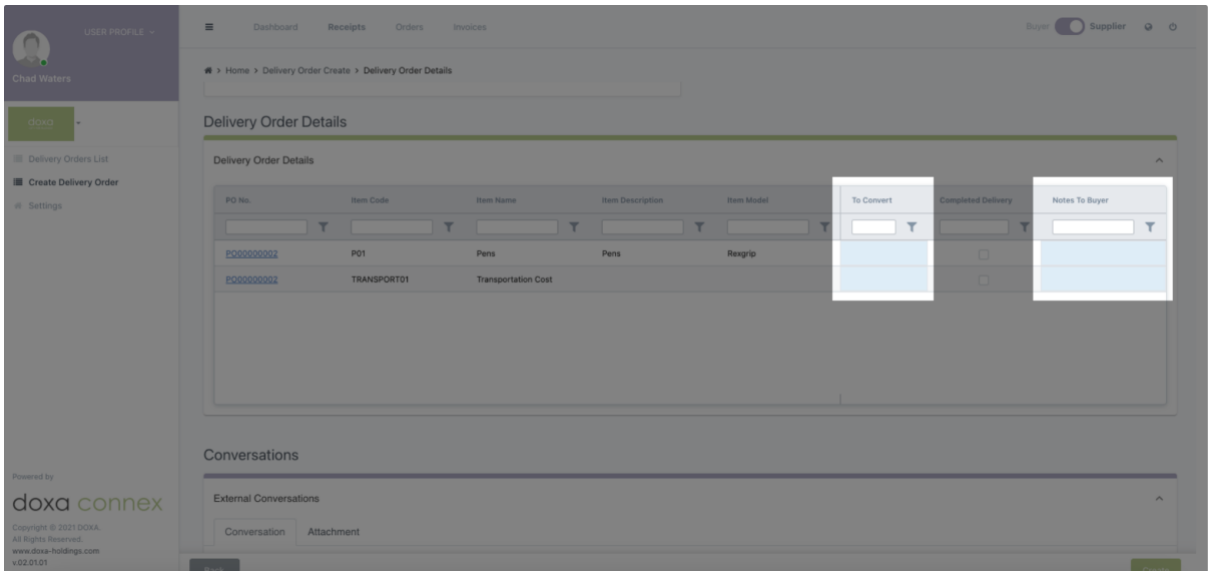



Select the PO in which you want to create DO from (click the checkbox)

Click Create **Delivery Order**

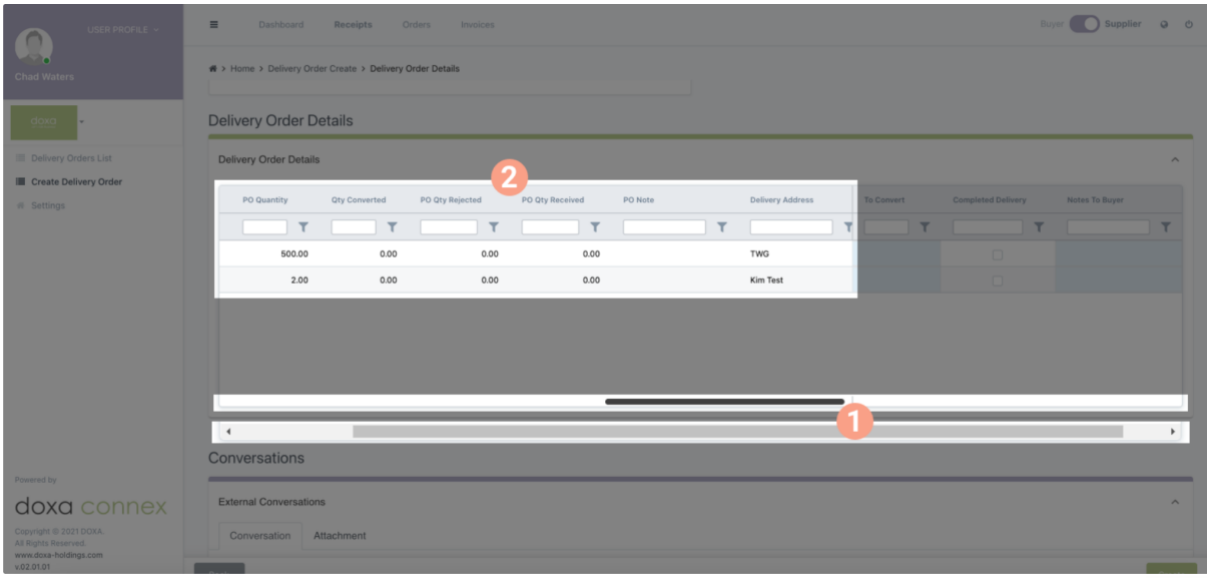



Input **Delivery Order No** and the **Delivery Date**, a required field.




Scroll down to input quantity delivering under “To Convert” column (the value here is the **quantity** you are converting to DO)

Input Notes To Buyer (if required)




Use the scrollbar at the bottom to scroll to the right. Mac users without a mouse may not see a visible scrollbar, but you are still able to scroll to the right.

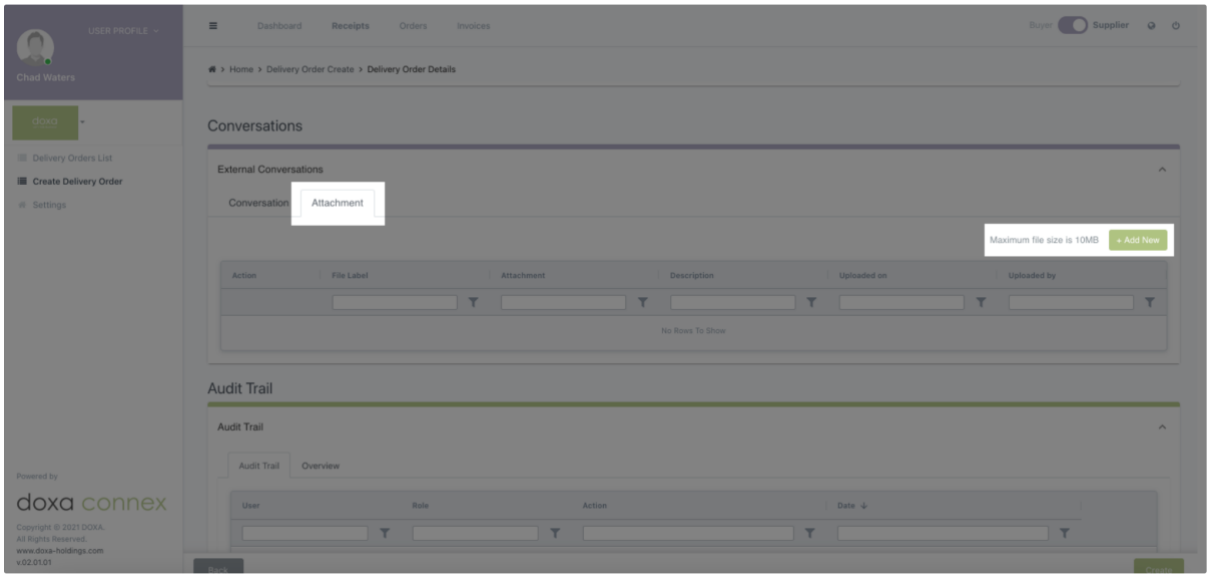
You will see these columns:

**PO Quantity**: Qty from the PO issued to supplier

**Qty Converted**: Qty based on the DO/(s) created by the Supplier

**PO Qty Rejected**: The difference between all DO issued to buyer and all GR created from DO by buyer

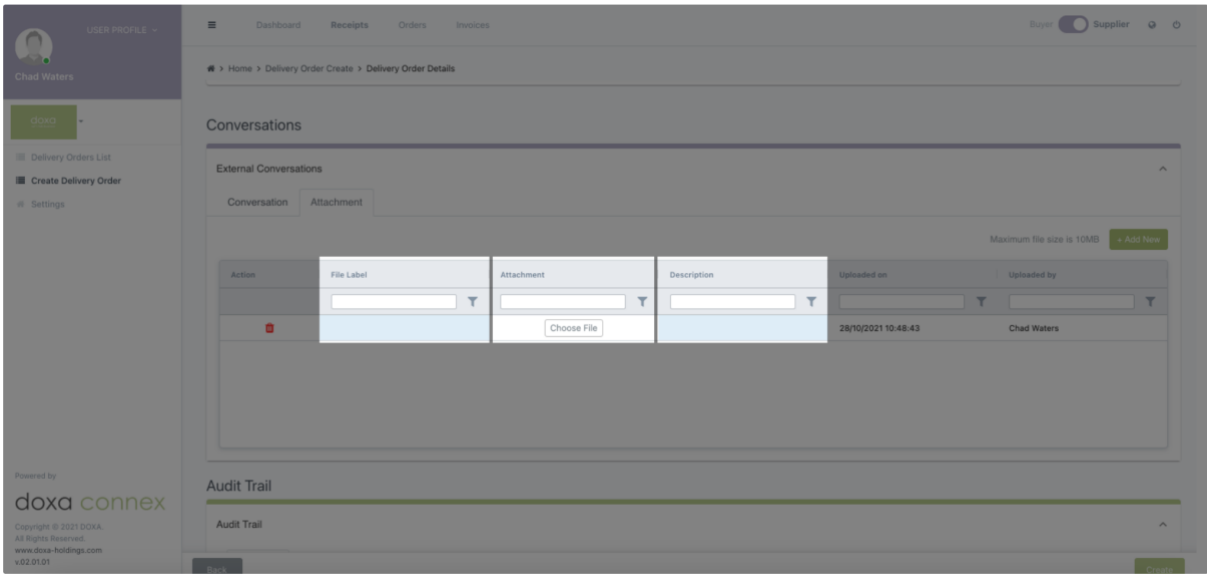
**PO Qty Received**: Qty buyer created GR on the DO issued by the supplier




Upload your hardcopy signed DO under the Conversations section.

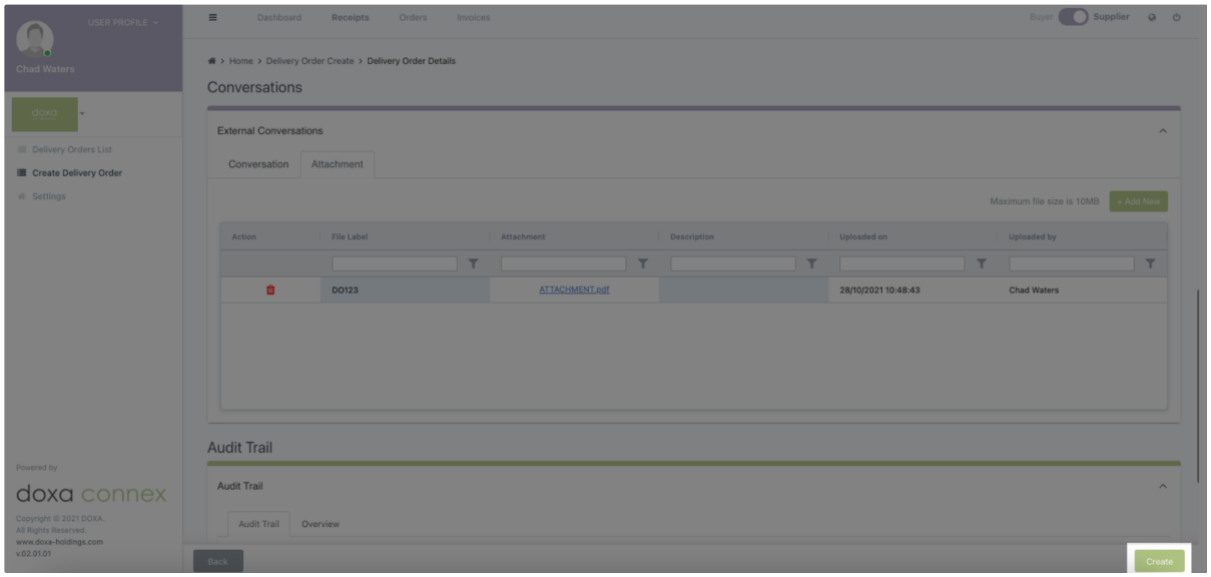
Click **Attachment** under Conversations

Click **+Add New** to create a new conversation row

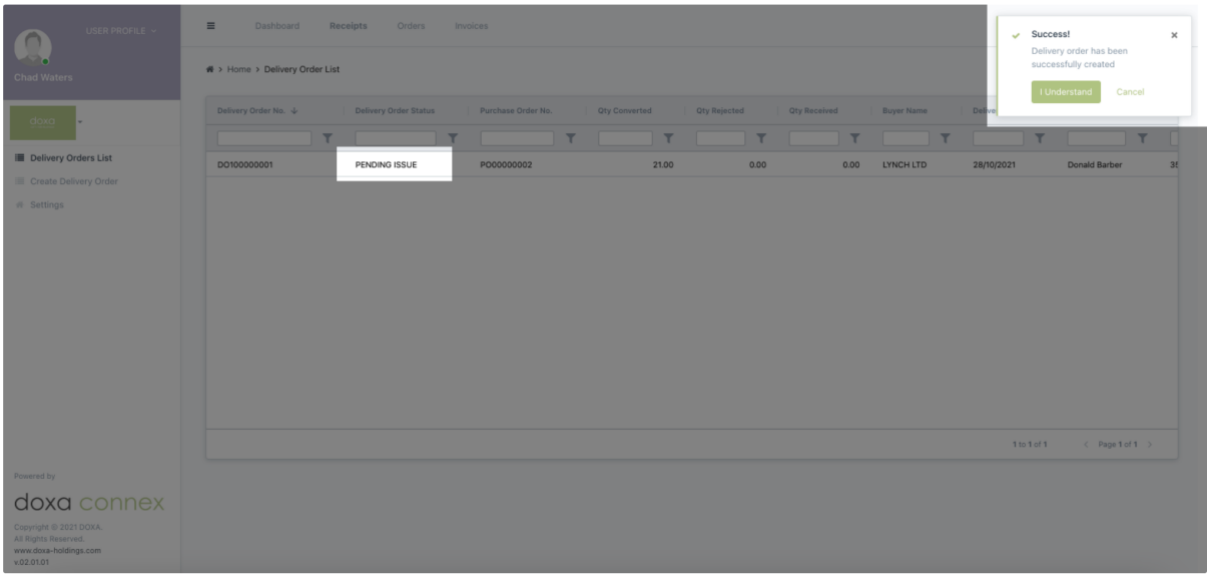



Click **Choose File** and select the file from your computer

Input File Label and/or Description (optional)



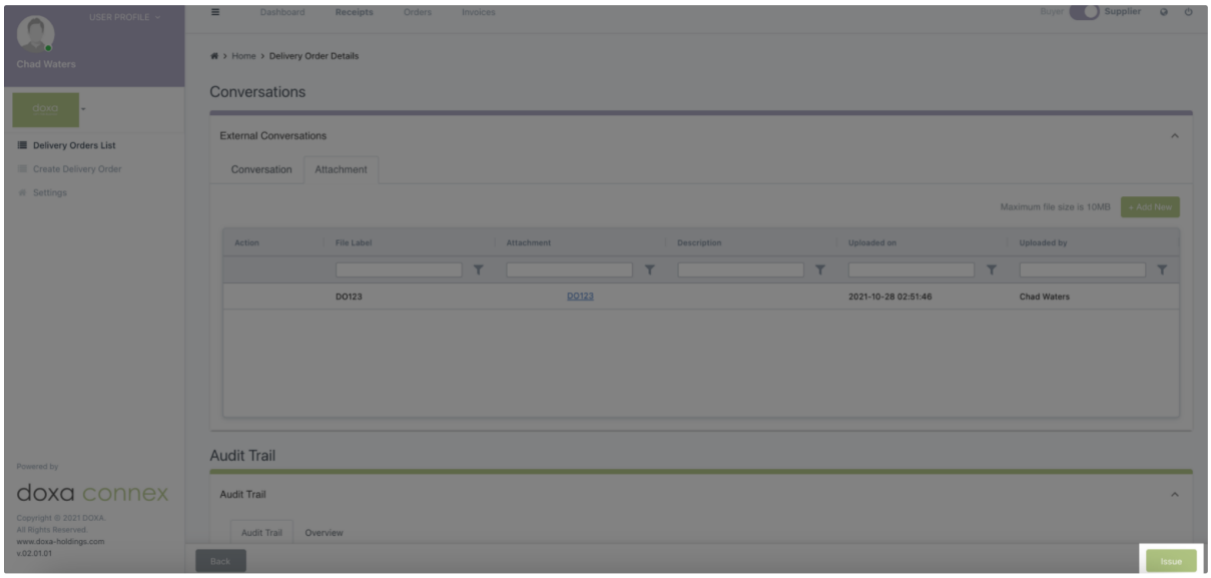

Click **Create** to create DO



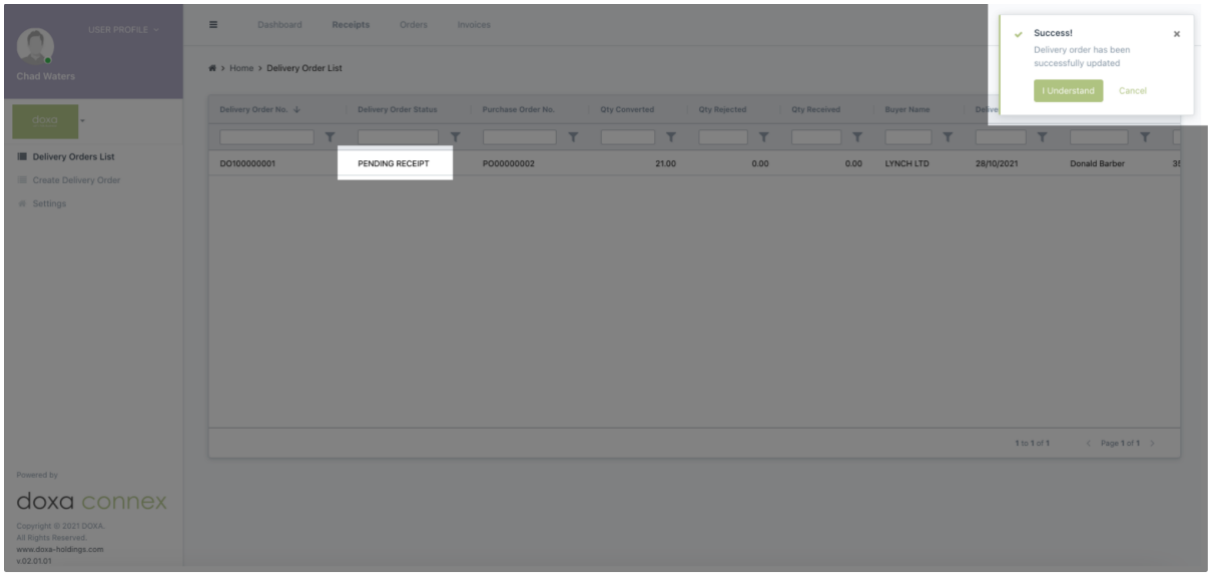

Once DO is created, there will be a notification to inform the user that this DO has been successfully created. User can click **I Understand** or **Cancel**.

The status of DO will be shown as PENDING ISSUE.

The “PENDING ISSUE” status means that DO is created but not yet issued to the buyer. This DO is now pending supplier to issue to buyer.




Click **Issue** to issue the DO.

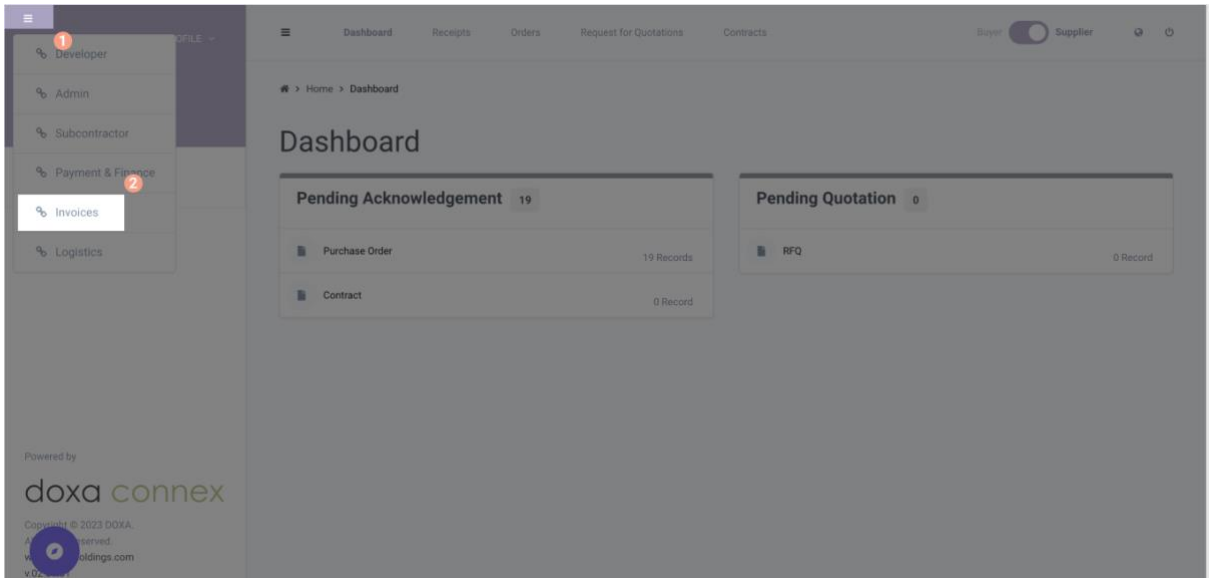



Once DO is issued, there will be a notification to inform the user that this DO has been successfully updated. User can click **I Understand** or **Cancel**.

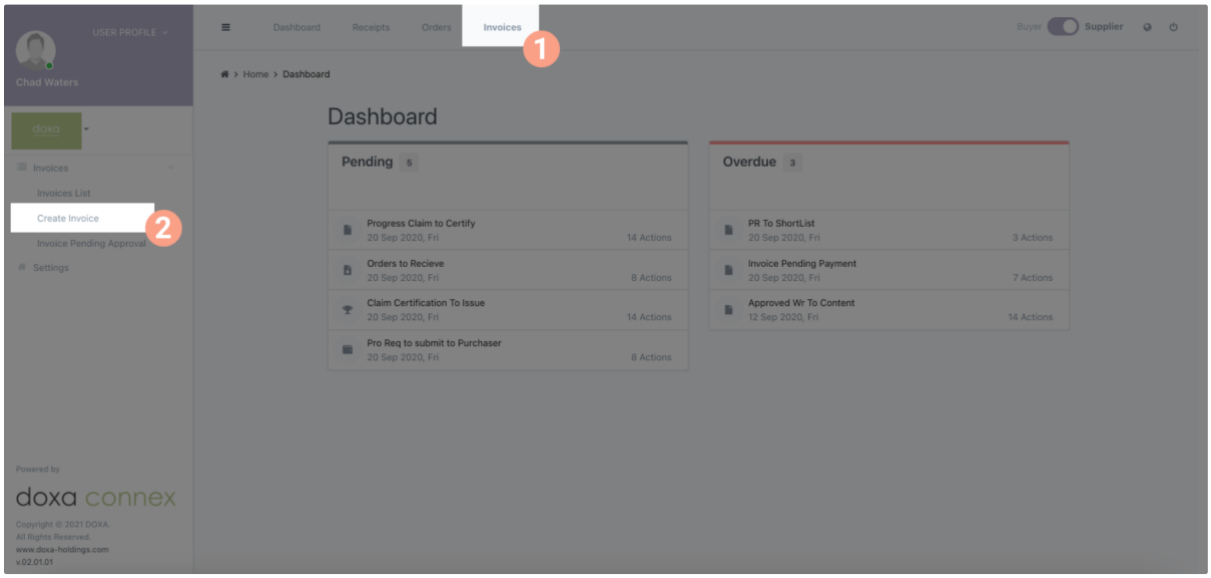
The status of DO will be PENDING RECEIPT.

“PENDING RECEIPT” means DO has been **created and issued** to buyer. DO is now pending buyer to create the Goods Receipt.

# How to Issue an Invoice

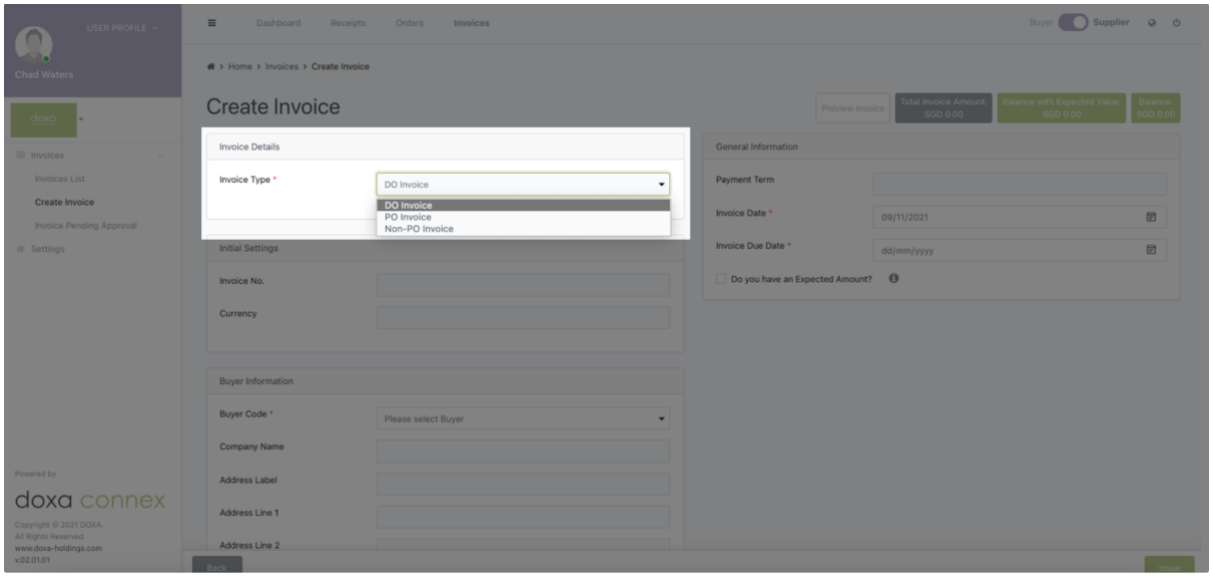



Click on the 3 dashes beside User Profile
Click **Invoices**

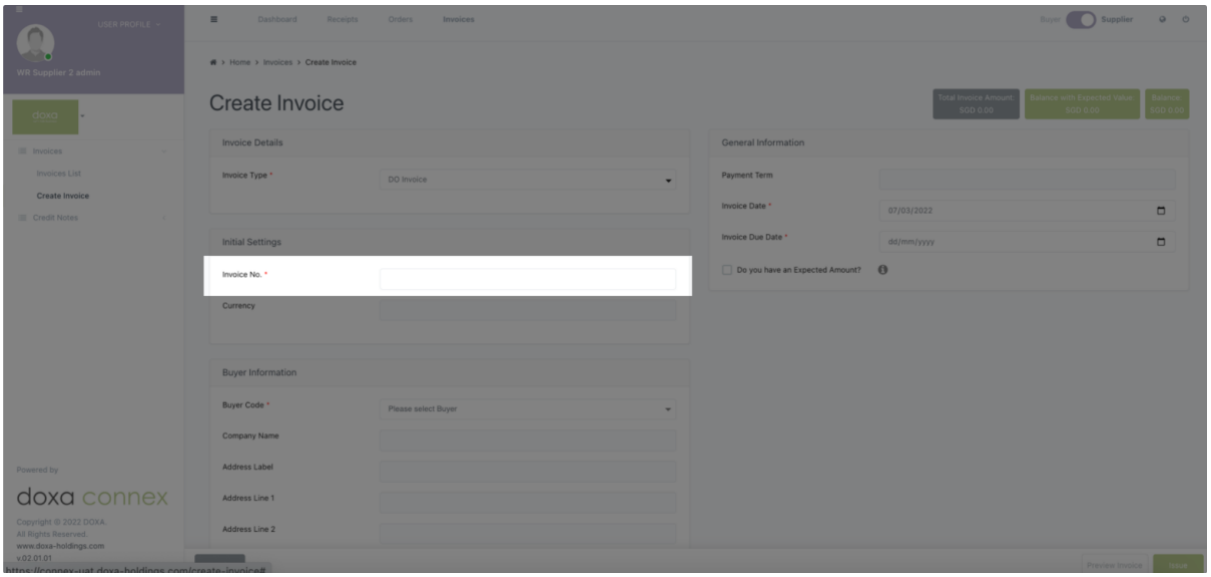



Click **Invoice**

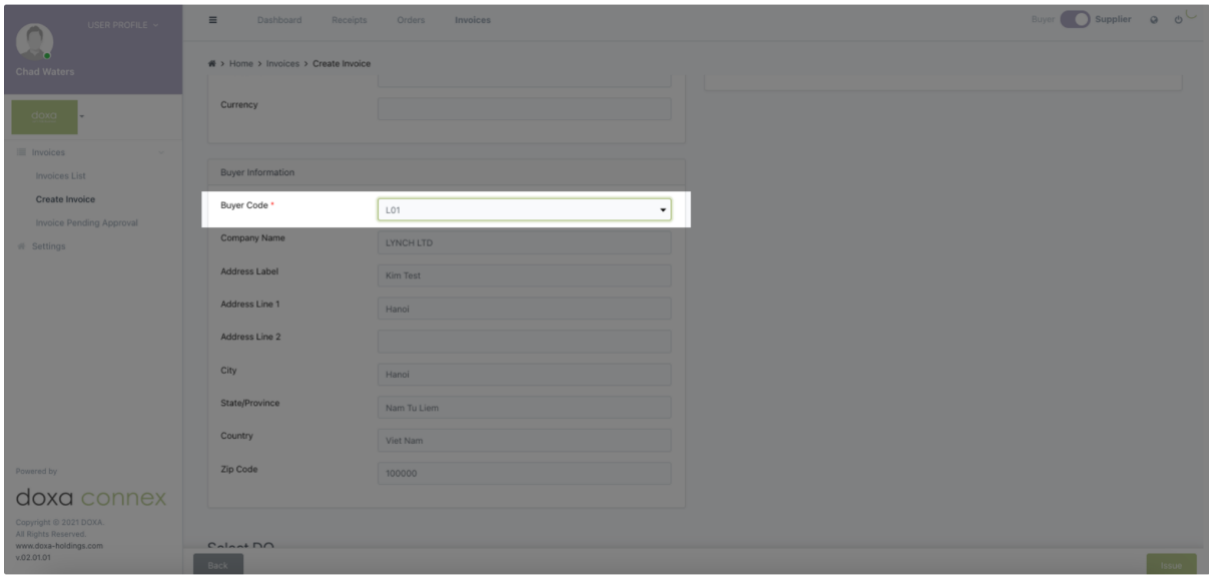
Click **Create Invoice**



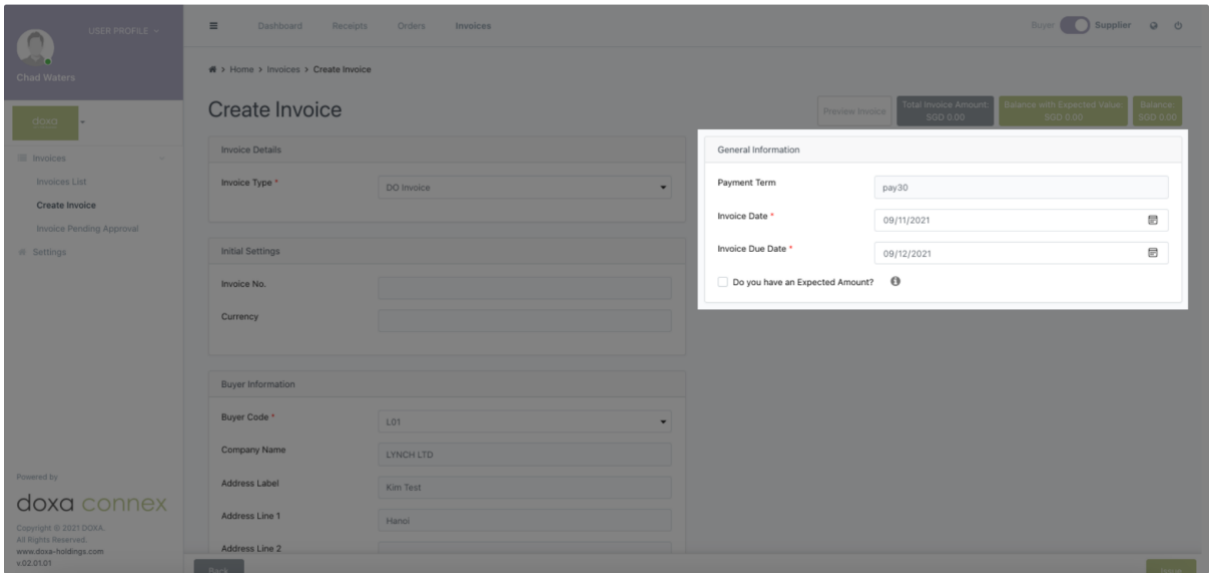

Select **DO Invoice** under the **Invoice Type** dropdown




Input **Invoice Number**

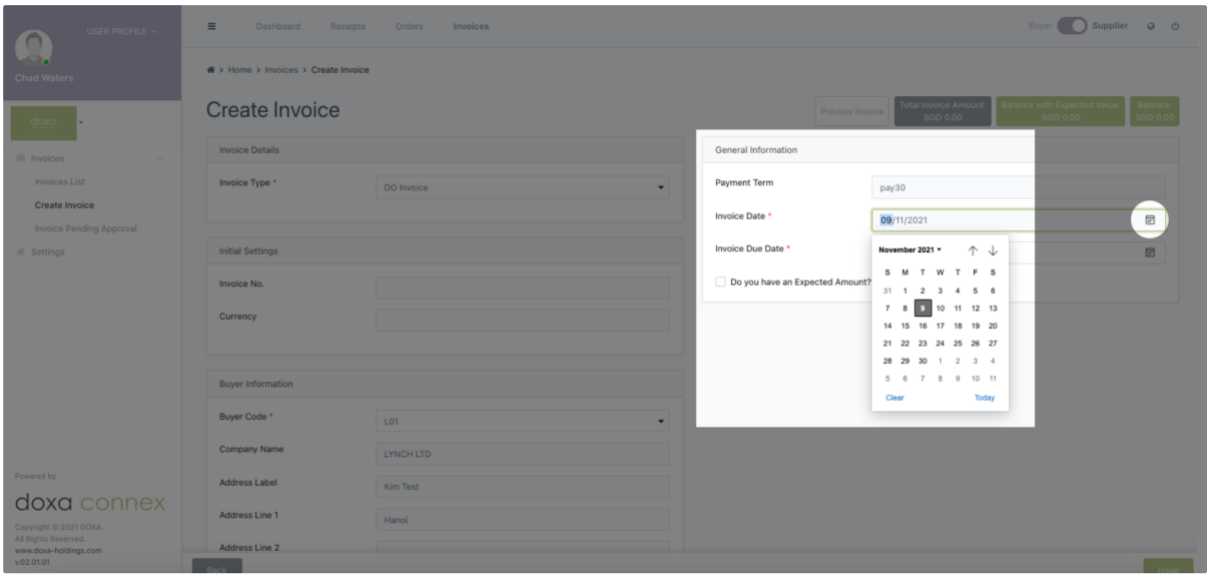



Select the **Buyer Code** under the dropdown
The buyer information will be auto populated

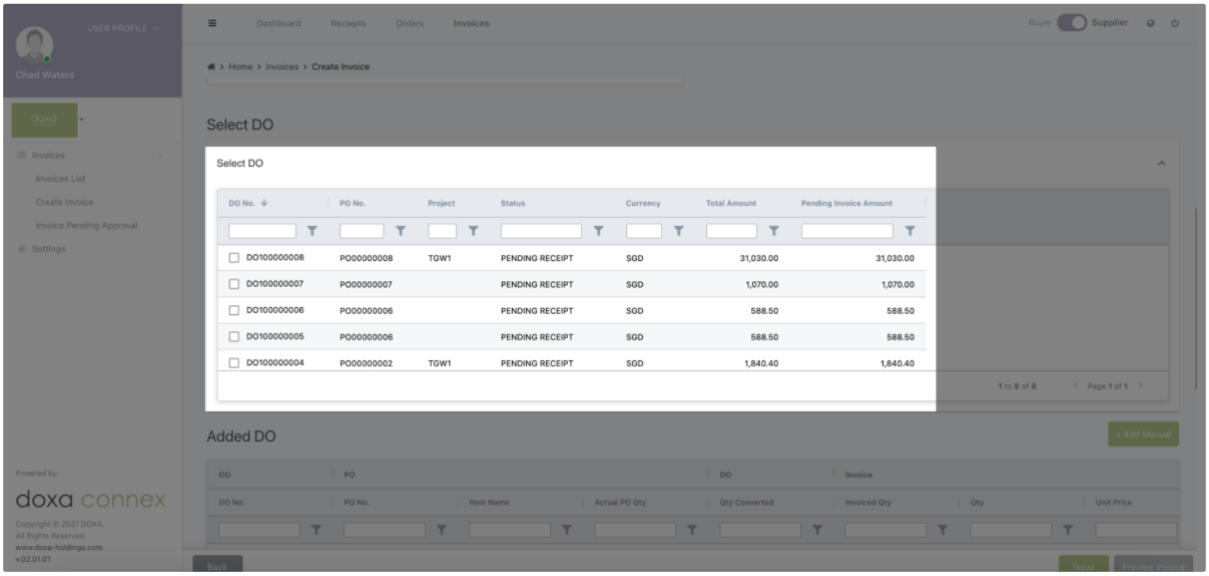



## General Information

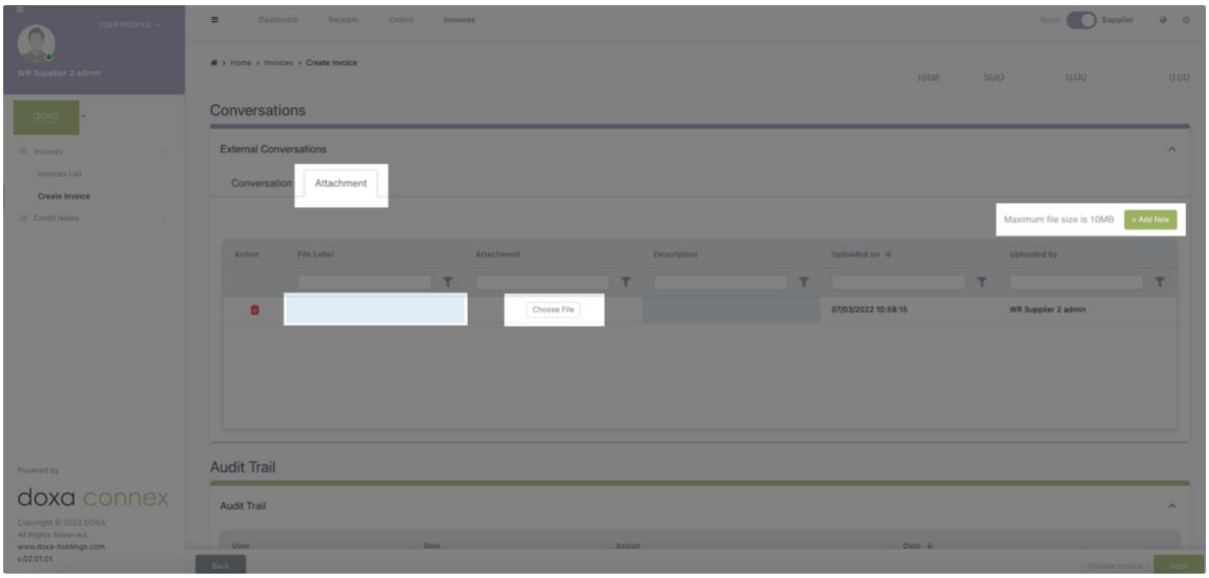
**Payment Term**: will be auto populated once the Buyer Code is selected (refer to step above)




**Invoice Date**: Input invoice date/click on the calendar icon to select date
**Invoice Due Date**: will be auto calculated based on the Invoice Date selected and Payment Term

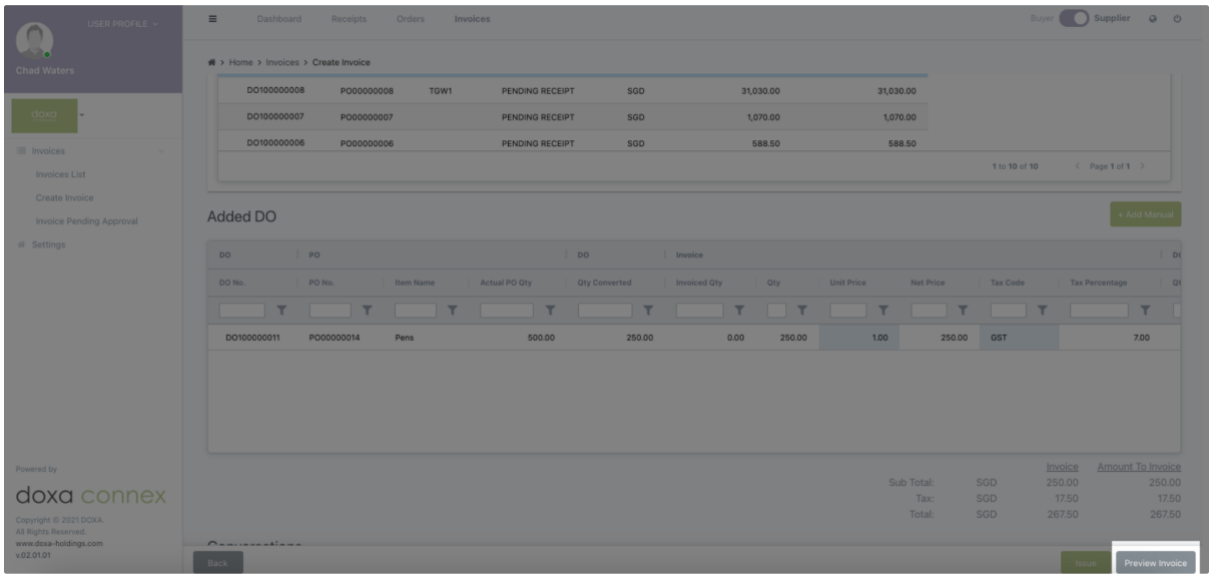



Select the DO to invoice using the checkbox on the leftmost column



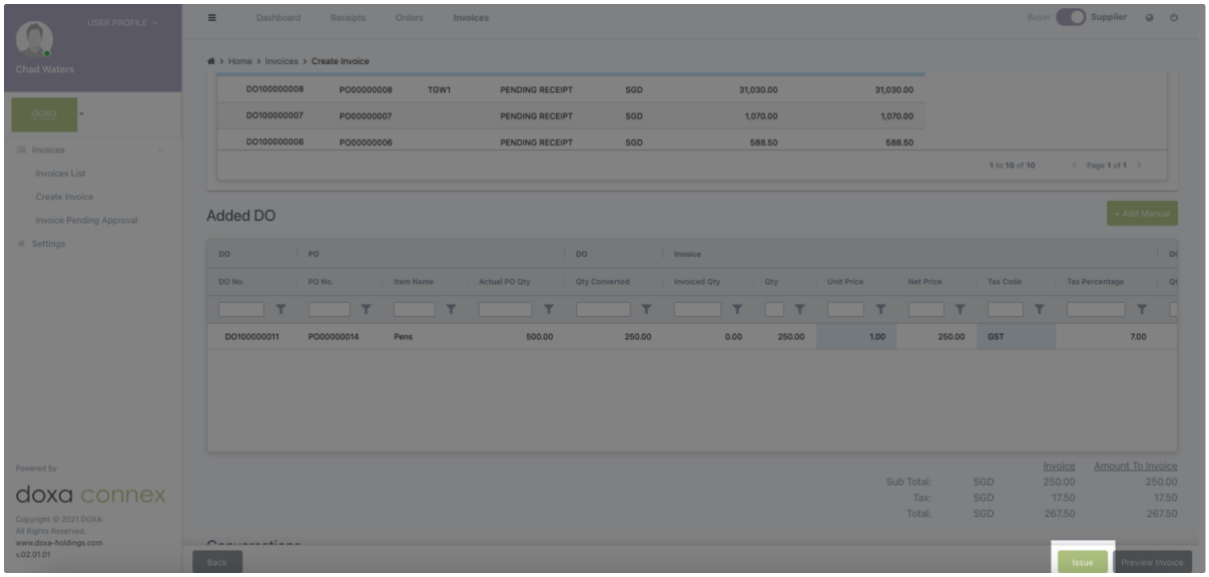

Upload your hardcopy Invoice under the Conversations section
Click **Attachment** under Conversations
Click **+Add New** to create a new conversation row

Click **Choose File** and select the file from your computer
Input **File Label** and/or Description (optional)

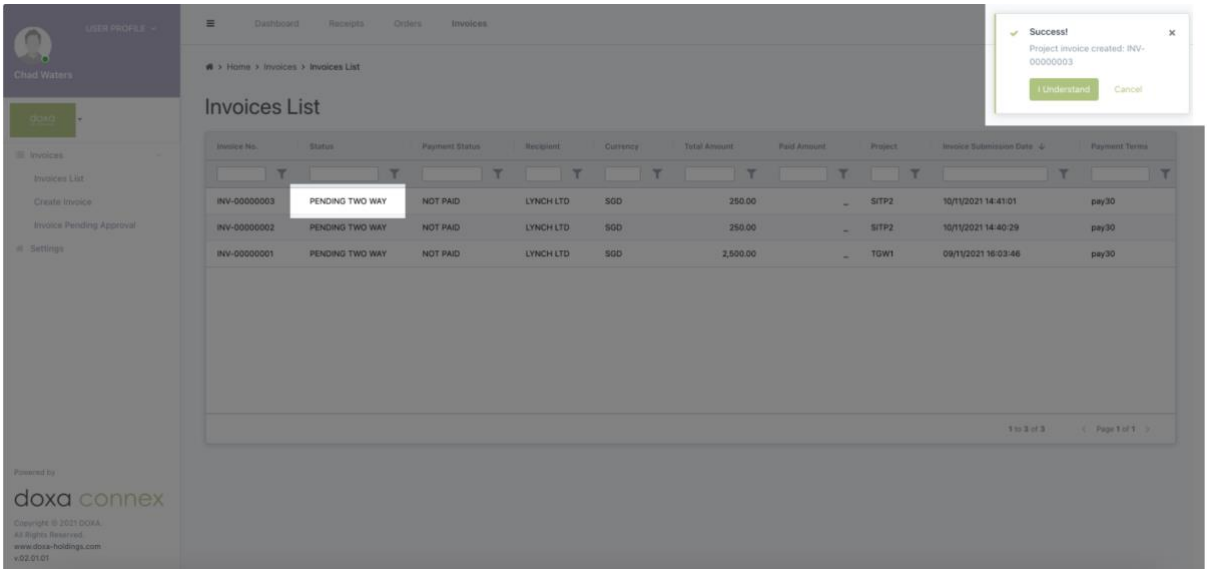



Click **Preview Invoice** before issuing the Invoice

The preview will appear in a pop-up with a “DRAFT” label



Click **Issue** to Issue Invoice




Once the Invoice is Issued, there will be a notification to inform the user that Invoice has been successfully created. User can click “I Understand” or “Cancel”.

The status of the Invoice will be “PENDING TWO WAY”

‘Two Way’ refers to PO and Invoice.

Once the Buyer has created the Goods Receipt, the status of the Invoice will change to "PENDING THREE WAY"

"Three Way" refers to PO, Goods Receipt and Invoice.

| |
|---|
| Did the above information solve your queries? If not, please contact us at +65 6970 9920<br>Or refer to our complete online user manual at :<br>https://www.doxa-holdings.com/support/supplier |
| Thank you for using Doxa Connex. |