TecCom Portal

User Manual

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Supported browsers:
- Edge
- Firefox
- Chrome

The compilation of texts and pictures was done with the utmost care. However, errors in the user manual may not be completely excluded. The authors and editors would be grateful for information regarding errors and suggestions for improvements. The companies used in the examples, as well as names and data are fictitious.

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Index

1 Summary

This document describes the use of TecCom Portal with all its functions and also provides useful additional information and tips.

It is divided into the main menu items:

- **Registration for the TecCom Portal**
  This section describes how you can register with the TecCom ID and corresponding password as an administrator for your organization.
  A distinction is made, if you want to register as a new TecCom user and thus also create your new TecCom user, or if you already have an existing TecCom user and want to add only one additional organization to this user.

- **Login and logout**
  Here is a description of how to log on with your existing TecCom user to the TecCom Portal and also how to log out. In addition, this section explains how to create a new password, if you have forgotten your personal password.

- **Useful settings and information**
  Here you get useful information and tips on how you can make individual display settings and how to switch between your organizations without logging in again. You will also find definitions of business processes in this section..

- **Edit user profile**
  After logging in, you can review and edit your personal user data.

- **Administration**
  This menu allows you to control the management of your TecCom Portal and review your administration data for the areas of IFD settings, organizations, users, ship-to and partners.

- **Request & Order**
  Under new request or order you see the general supply information, list of articles and article details are described, as well as the function of import data file. In addition, the Shopping cart and the Favorite Manager are explained.

- **Journal**
  Here you find a description of the general filter settings and functions in the journal, as well as an explanation what information you can find in outbound and receive.

- **Helpdesk**
  In this section you will quickly find our contact information for the TecCom helpdesk and information for suppliers

- **Further TecAlliance solutions in TecCom**
  CMD, Warranty&Returns and eInvoice are also implemented in TecCom.

2 Registration for the TecCom Portal with the TecCom ID and password

To register for the TecCom Portal as an administrator for an organization, you need a TecCom ID and corresponding password. With this TecCom ID your organization was created as a customer in the TecAlliance Membership Directory and the TecCom ID is firmly connected to your organization. If you don't have a Tec-Com ID and password for your organization, then please have an administrator of your organization create a new user for you. You will be invited to the organization via e-mail and then you are able to activate your user. Find more information on this in 6.3.1 Create a new user.

The TecCom ID and password for your organization are your "key" for the use of TecCom Portal and entitles you to the <u>free</u> use of TecCom Portal.

⚠ Please keep your TecCom ID and password in a safe place and protect these credentials against unauthorized access!

You can via the registration process on the login page of TecCom Portal:
- create a **new** user for yourself and register for an organization as an administrator, or
- register as an **existing** user to an organization as an administrator. To register as an existing user for an additional organization as an administrator, you can create the new organization also conveniently after you have logged on through the normal process for the TecCom Portal in the administration.

Please note, that on the registration process you sign in yourself as a user for the TecCom Portal.

The following describes how to log on as administrator for an organization in the registration process.

- To access the registration for the TecCom Portal, use directly this link
  https://tecweb.tecalliance.net

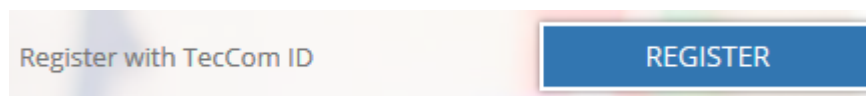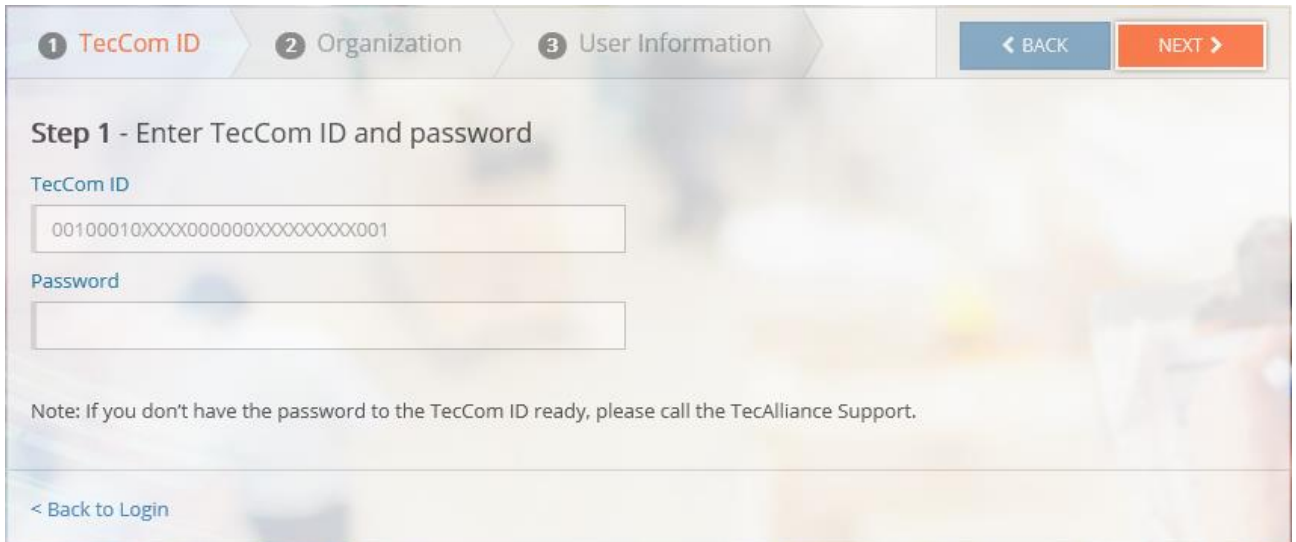- Click on the login page on the button **Register**

Figure 1: Registration with the TecCom ID and password on the login page

- This will take you to a new page on which you can register your organization with the TecCom ID and password in three steps and create for your user in this organization the role of administrator.

2.1 Step 1: Entering the TecCom ID and password

- Please enter the TecCom ID and corresponding password that you received from the TecAlliance support via e-mail.

- Click on **Continue.**

Figure 2: Step 1 - Entering the TecCom ID and password

2.2 Step 2: Display of the organization name

- Once you have registered in the step before with the TecCom ID and the corresponding password and clicked on **Continue**, you will be forwarded to the second step of the registration.

- There, the organization name is displayed, which is stored for your TecCom ID at TecAlliance. This is only for information with no input necessary on your part.

> If you want to change the organization name, please contact the TecAlliance Support. The support team can change the organization name in our system, which also adjusts the used organization name in TecCom.

- **Automatic document retrieval:**
  Do you want to retrieve automatically order responses, dispatch advices and invoices that you receive from suppliers?
  When the checkmark is checked, reverse messages are no longer retrieved by TecLocal!

- Click on **Continue.**

Figure 3: Step 2 - Display of the organization name

2.3 Step 3: Create a user as an administrator for the organization

- In the last step of the registration you create **your user as an administrator** for the organization that you have previously selected with the TecCom ID and password.

- Here we have to distinguish between two cases:

  If you do **not** have an own TecCom user, please follow the instructions in 2.3.1 Registration as a new TecCom user

  If you **already** have an own TecCom user, please follow the instructions in 2.3.2 Registration with an existing TecCom user.

2.3.1 Registration as a new TecCom user

Only if you do **not** have a TecCom user yet, you must go through the following steps. **No** TecCom user means that you started working with the TecCom Portal for the first time and have not previously registered with your e-mail address in the TecCom or your TecCom user has been deleted.

- Select the checkbox **New User.**

Figure 4 - Registration of a new user

- Enter the corresponding information into the following mandatory fields:

First Name:	Enter your first name here.
Last Name:	Enter your last name here.
E-mail:	Enter your e-mail address which you want to use for signing in the TecCom Portal in the future and confirming your registration.
Retype e-mail:	Repeat the entry of your e-mail address. To avoid a wrong entry of the email address, for example by typos, no copy & paste is allowed for this field. The registration can only be completed successfully if you then activate your e-mail address through the registration confirmation e-mail.
Culture:	Here you can select via drop down list your culture code to select the date format according to your preference.
Time zone:	Select from the drop down list the time zone in which you are. According to the selection of the time zone, the time will be converted to your time zone.
Telephone (optional):	Entering your phone number is optional. Enter the phone number that you can be reached. This telephone number can be viewed by other administrators of the organization.

- Click on **Finish.**

- You will receive the confirmation message on a new page:

Please confirm your registration

An e-mail has been sent to your e-mail address. Please click on the link in this e-mail to confirm your e-mail address and to reset your password within the next 96 hours. After you have created your password, your user is activated and you are able to log in with your e-mail address and password on the login page of the TecCom Portal. You will then be created as an administrator for the organization SIT_B_QUA_TF_54789_Test-SMA. Find the organization in your organization list and edit it there. If you have not received an e-mail, please repeat the registration or contact your system administrator.

- Please close this browser window, because it is for information only.

- You will receive a "registration confirmation e-mail" to the e-mail address you registered with earlier.

⚠ Should you not have received an e-mail to confirm your e-mail address in your inbox, please check if the e-mail ended up in your spam folder.

⚠ Should you accidentally have entered the incorrect e-mail during the registration process, please repeat the steps of the registration as described in, 2.3.1 Registration as a new TecCom user

- Please open the "registration confirmation e-mail" and click on the link in the e-mail.

- You are automatically redirected to the registration confirmation page in a new browser window.

⚠ Please note that the link is only **active for 96 hours** and you have to activate your user within this time via the link. If you do not use the link within the 96-hour period, you have to repeat the registration steps.

Figure 5: Activating your user entering a secure password

- On the registration confirmation page you can activate your new user, through creating a personal password for your user.

- Enter your password in the **Password** field and repeat the password in the field **Retype password**. The entry in both fields must be identical and cannot be done with Copy & Paste.

⚠ Please note that your password must **be at least 8 characters** and **satisfy at least 3** of the following requirements:

The password must contain **lowercase** letters

The password must contain **uppercase** letters

The password must contain a **number** from 0 to 9

password must contain **special characters**

- With the display of a colored bar below the password field you can see whether the password corresponds to the complexity requirements of TecCom or not:

  Red: The password requirements are not met. You cannot use or save this password for your TecCom user.

  Yellow: The minimum requirements for password complexity are met. You can use and store this password for your TecCom user. To make your password more secure, we recommend to fulfill a further requirement criterion from the list.

  Green: The requirements of your user password are completely fulfilled and your password is considered safe. You can use and store this password for your user.

- Save your password with **Save**. You will receive an information message on the browser displaying that your password has been successfully saved.

- With the creation of your password, your user has been activated with your e-mail address and applied as an administrator for the previously registered organization.

- To log in on the TecCom Portal, go through **<Back to Login** on the registration confirmation page to the login page.

- You can now log in to TecCom Portal through the login page with your user data.

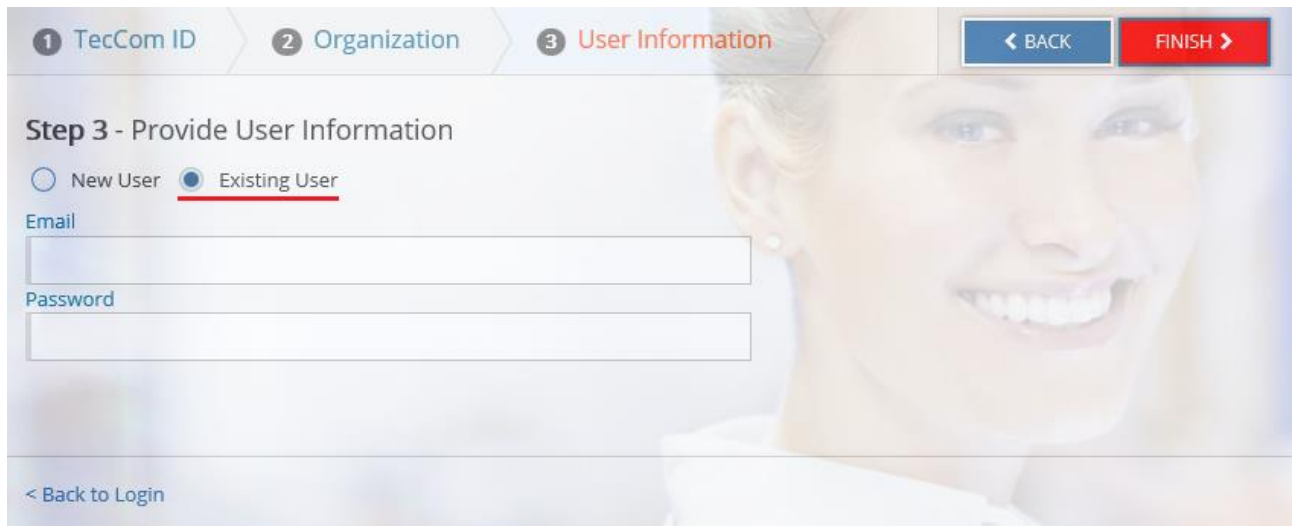## 2.3.2 Registration with an existing TecCom user

If you already have an **existing** TecCom user, you can register directly with this user for the new organization through the registration process on the login page.
An **existing** TecCom user means that you are already working with the TecCom and can sign in with your e-mail address for another organization to TecCom.

Alternatively to register for an additional organization in the registration process, you can create an organization after the normal login process in TecCom in **Administration → Organization**. Thus, you will be automatically created as an administrator for the organization. See more in 6.2.1 Create a new organization in administration.

Do you rather wish to register an additional organization through the registration process, then proceed as described below:

- Once you have previously entered your TecCom ID + password in the first step, saw the organization name in the second step and arrived through **Next** to the third step of the setup wizard, click then on the checkbox **Existing User**.

Figure 6: Registration with an existing TecCom user

- Enter the corresponding information into the following mandatory fields:

    E-mail: Enter your e-mail address here for which your user has already been activated for TecCom via the registration confirmation e-mail and which you use for the signing in on the login page.

    Password: Enter your personal password here that you've created for your user. If you have forgotten your password, please reset your password first.

- Click on **Finish**

- Your user is created as the administrator of the registered organization.

- Immediately after the registration of your existing user for the new organization, you will be logged in to the TecCom Portal and do not need to sign in again on the login page.

- There are now several organizations assigned to your user. Find all assigned organizations in your user details under **Administration → User**.

3 Log in and log out

Once you have successfully created your user and registered for an organization in TecCom Portal, or your new user was invited by an administrator to TecCom and you have confirmed your registration, you can log in via the normal login process into the TecCom Portal anytime.
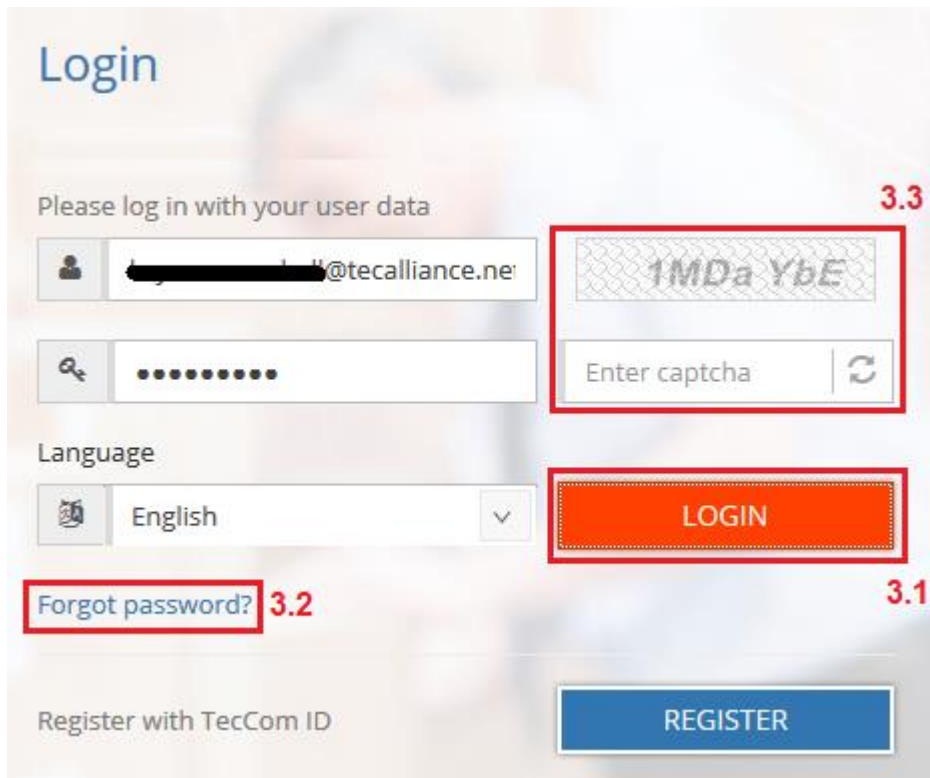

Figure 7: TecCom Portal login

3.1 TecCom Login

- Use the TecCom Portal login page by directly clicking on the following link:

    https://tecweb.tecalliance.net

- The requirement for a successful login in the TecCom is that you have completed the registration process and have already set a personal password for your user.

- Have you already registered your user, enter the corresponding information in the mandatory fields on the login page:

    E-mail: Enter your e-mail address here for which your user has already been activated for TecCom via the registration confirmation e-mail and which you use for the signing in on the login page.

    Password: Enter your personal password here that you've created for your user. If you have forgotten your password, please reset your password first.

    Language: Select via the drop-down list the language in which you want to log in to the TecCom and use as display language during the session. Subsequent changes of the display language are only possible at the time you log in.

- Click on **Login** and you can start working with the TecCom.

- **Newsletter**
  After logging in, a window appears with the indication of which new functions have been implemented in the new TecCom version. In regular cycles new features are built and published. The window will appear until you set the marker **don't show the message anymore**. When a new version of TecCom is available again, the window reappears.

3.2 Forgot password?

Have you forgotten your personal password for your TecCom user? No problem. Then just use the **"Forgot password function"** on the login page of TecCom Portal and reset your password.

- The requirement for the use of the "password forgotten function" is that you have completed the registration process and have already set a personal password for your user

- Click on **Forgot password?** on the login page.

- This takes you to a page where you can enter your registered e-mail address for your user in the **e-mail** field.

- Click then on the **Request password** button.

- You will automatically receive the "Password reset e-mail" to the specified e-mail address and the confirmation of its sent is displayed with a message on the **Forgot Password** page.
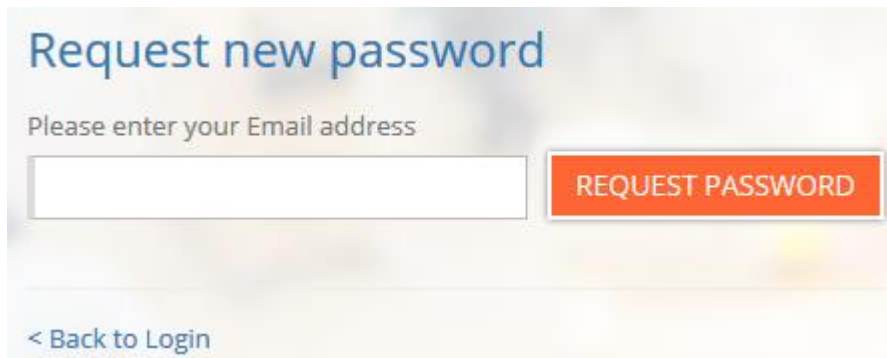
Figure 8: Send request to reset password

- You can close the browser window through which you requested the "Password reset e-mail".

- Open the "Password reset e-mail" and click on the **link** in the e-mail.

- You will be automatically directed to the "Password reset page" in a new browser window.

> ⚠ Please note that the link is only **active for 96 hours** and you need to reset your password via the link within this time. If you do not use the link within the 96-hour period, you have to repeat the previously described "Forgot password function".

- On the "Password reset page" you have the option to create a new personal password for your user.

- Enter your password in the **Password** field and repeat the password in the field **Retype password**. The entry in both fields must be identical and cannot be done with Copy & Paste.

> ⚠ Please note that your password must **be at least 8 characters** and **satisfy at least 3** of the following requirements:

The password must contain **lowercase** letters

The password must contain **uppercase** letters

The password must contain a **number** from 0 to 9

password must contain **special characters**

- With the display of a colored bar below the password field you can see whether the password corresponds to the complexity requirements of TecCom or not:
  - Red: The password requirements are not met. You cannot use or save this password for your TecCom user.
  - Yellow: The minimum requirements for password complexity are met. You can use and store this password for your TecCom user. To make your password more secure, we recommend to fulfill a further requirement criterion from the list.
  - Green: The requirements of your user password are completely fulfilled and your password is considered safe. You can use and store this password for your user.

- Save your password with **Save**. You will receive an information message on the browser displaying that your password has been successfully saved.

- To log in on the TecCom, go through **<Back to Login** on the registration confirmation page to the login page.

- Enter the corresponding information in the mandatory fields on the login page:

E-mail: Enter your e-mail address here for which your user has already been activated for TecCom via the registration confirmation e-mail and which you use for the signing in on the login page.

Password: Enter your personal password here that you've created for your user. If you have forgotten your password, please reset your password first.

Language: Select via the drop-down list the language in which you want to log on to the TecCom and use as display language during the session. Subsequent changes to the display language are no longer possible after login.

- Click on **Login** and you can start working with the TecCom.

3.3 Query of a security code

- If you already have entered your e-mail address on the login page and entered **three times** your personal password **incorrectly** in the **password** field, then for security reasons entering a **security code** is required to protect your user against unauthorized access.

- Read the security code and enter it manually in the field **Security code** below.

The security code must be identical. When the displayed security code is not entered correctly in the field **Security code**, then you need to repeat the process until it matches.

- If you can't read the security code correctly, you can then request a new security code by clicking on the **refresh symbol** ⟳ , which can be found next to the field for entering the security code.

- Correct your password and make sure that you have your entered your personal password in the field **Password**.

- Click on the button **Login** to log in successful on the TecCom.

3.4 Logout of the TecCom

If you want to log out from the TecCom Portal, then click in the top right on the **Logout icon** ⇨ .

Confirm the message with **Yes** if you want to log out from TecCom or return with **No** in the TecCom menu.

4 Useful settings and information

In the following section you will find a description of useful general functions and information regarding Tec-Com.

The general settings can help you to adapt the TecCom to your individual needs. Therefore you have the possibility within the menu items of Request & Order, Journal and Administration to:

- configure the displayed columns in the list display individually
- individually configure the number of line items displayed per page
- as well as to save the individual display settings permanently

You can use the TecCom on variable devices through the responsive design.

You will also find information for the following topics:

- organization selection for multi-organizational settings
- definitions of request, express order and stock order

4.1 Individual display settings in TecCom

You have the possibility to adjust and save your individual display settings in TecCom according to your preference.
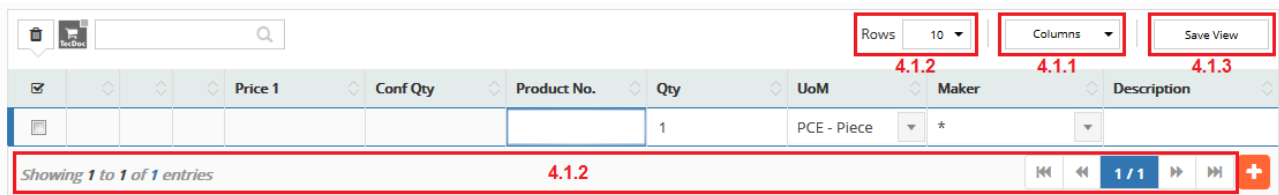

Figure 9: Custom display settings

For the sections:

- **Request & Order**   → New request or order / Manager
- **Journal**   → Outbound / Received
- **Administration**   → Organizations / User / Ship-to / Partners

you can individually define the columns displayed and the number of entries displayed. These settings are either temporarily valid or can be saved permanently with **Save view**.

4.1.1 Selection of displayed columns

If you click on **Columns**, you get a list with a selection of possible columns displayed on the page. If you like to compile your individual column display, please uncheck **Default** and select the respective check box for the columns that should be displayed.

If a column is marked with a check mark in the corresponding checkbox, the column is displayed. If no check mark is set, the column is not displayed. If you want to reset your individual columns display, then select the checkbox for **Default**. This will reset your customized columns view and only display the default columns.

4.1.2 Selecting the number of entries displayed per page

You can define for each page individually the number of rows displayed per page. To do this, select in the list the desired number of rows. The display instantly adapts to your selection.

TIP: Read the total number of entries

You can see the total number of rows below the displayed results. The total number is highlighted with blue color and you can also immediately see how many results are displayed per page.

If the total number of rows exceeds the display on a page, you can either increase the number of rows displayed per page accordingly, as described in 4.1.2 Selecting the number of entries displayed per page or you switch with the arrows below the items to the next page.

4.1.3 Permanent saving of the individual display settings

You can save your individual settings for the page permanently by pressing **Save view**. Your settings are thereby saved even after leaving the page or the session. By loading the page again, you can find your individual display settings preset accordingly and adapted to your needs.

4.2 Organization selection in TecCom

You can switch between multiple organizations in TecCom, without having to log off and in again. The requirement for this is that your user has various organizations assigned to him in the master data.
To switch between the assigned organizations, you can select the desired organization on the top right in the combo box next to your user e-mail address. All entries will be displayed according to the selected organization.
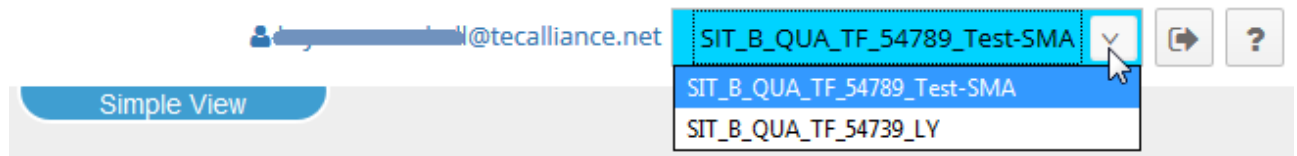

Figure 10: Organization selection for multi-organizations

The last selected organization is selected automatically again at the next log in.

4.3 Definition of business processes

The following information provides a brief overview of the business processes that can be mapped.

4.3.1 Request

Requests are not binding and are for information only. A request does **not** imply any material reservation with the supplier.

Number of items:
The number of inquiry items is not limited but it is recommended to limit the number at 1000.

Returned information:
- Availability   Indication on whether the desired item is in stock in the requested amount. The purchaser can specify both for the individual order item as well as for the entire order, whether he agrees with partial deliveries or wishes a complete delivery. A supplier may waive statements of availability.
- Prices   It's about either list or customer-specific prices. Optionally, a supplier may waive the display of prices.
- Description   Checking of the product number and short text for the ordered part. This text serves the customer to compare if the ordered product number belongs to the desired part.

- Information on alternative parts (depending on the supplier, this means an alternative part is a functionally identical part from another manufacturer or a replacement part of the same manufacturer)
- Information when the desired parts cannot be ordered at the supplier (defective part numbers or missing parts). What information is returned, is dependent on the specific implementation of the ERP system (enterprise resource planning system) and also depends on the configuration of the supplier system.

4.3.2 Express orders

Express orders are time-critical and are carried out without backorder or delivery schedules ("schedule lines"). The response to an express order is the same as an order confirmation and the supplier confirms only the quantity that can actually be delivered based on the selected shipping method and the associated delivery.

Number of items:
The number of order items is not limited, but it is recommended to restrict the number to a maximum of 1000.

Returned information:
- For express orders the same information as in request is returned about availability, prices, descriptions, alternative parts and errors.
- If possible, the customer will receive an order or document number, to have a reference when contacting the supplier.
- If the supplier has carried out the availability check as described above, the customer may equate the returned information of the order confirmation to a delivery notice.

The buyer may assume that the as available reported positions will be delivered to the specified date.

4.3.3 Stock orders

Stock orders are not time critical, they serve e.g. for the routine filling of the warehouse of an orderer. Stock orders are processed on the supplier side with backlog and schedule lines. A delivery date possibly specified by the orderer is not binding (requested delivery date), the delivery can also be after this date.

Number of order items:
The number of order items in a stock order is not limited, but it is recommended to limit the number to a maximum of 1000.

Returned Information:
- For stock orders the inquiry functionality is carried out only partially.
- There is no availability information returned, relating to the requested delivery date
- Whether the price information is returned depends on which data processing is selected for stock orders.
- For not valid item numbers error messages are returned.
- No information on delivery date is returned (not even in the case of graduations)
- If possible, the customer will receive an order number, to refer to his order with the supplier.

4.3.4 e-Invoicing (TecInvoice) in TecCom

e-Invoicing is the TecAlliance Solution that allows suppliers to deliver legally valid electronic invoices to their invoice recipients.
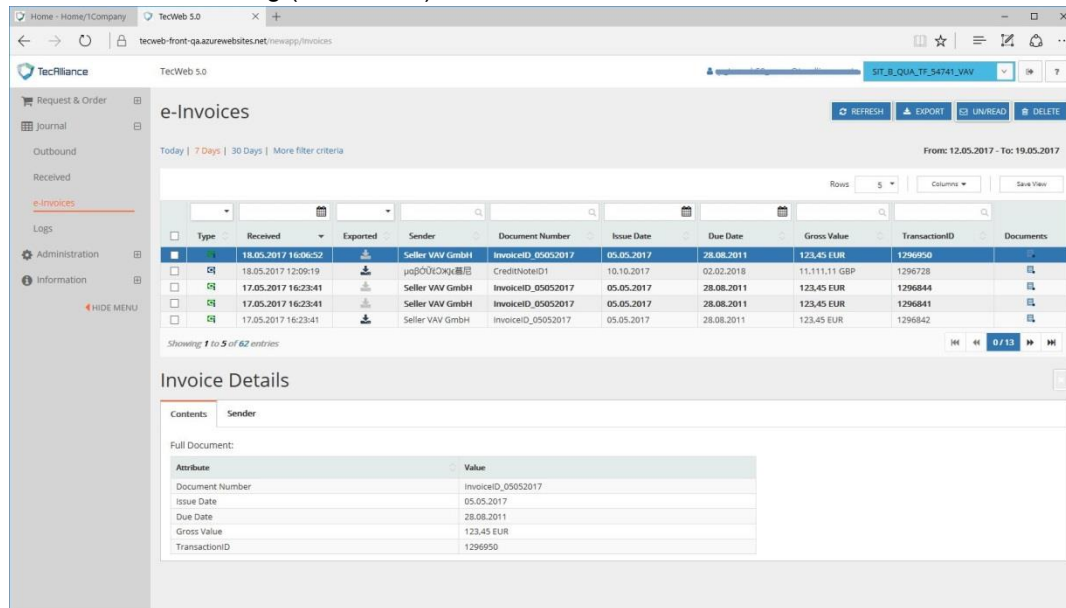
As invoice recipient you can now receive and view the electronic invoices in TecCom. In addition to the current options to receive electronic invoices, i.e. via email, Web Service (PullClient, TOMConnect) or BillPre-

sentment Portal, you have now the possibility to receive electronic invoices with the same tool that you use to order. The invoices are provided in a separate "e-Invoices" journal of the TecCom.

The e-Invoices journal shows the most important data of your invoices at a glance without the need to open the invoice documents. You can sort, search and filter the invoices using different criteria similar to the other TecCom journals. You can view and download the invoices and corresponding documents like structured data, electronic signature, verification report or index file.

The following shows a screenshot of the new e-Invoices journal in TecCom for legally valid invoices that are sent via the e-Invoicing (TecInvoice) Service:

Figure 11: e-Invoices journal

What needs to be done when you want to receive invoices in TecCom?

1. You already receive invoices from your supplier via the e-Invoicing (TecInvoice) service:

    a. Please inform TecAlliance Support, that you want to receive electronic invoices in TecCom. TecAlliance support will provide the necessary configuration. They will need the TecCom ID of your organization where you want to view your invoices.

    Note for TecInvoice PullClient users: Currently it is not possible that you receive invoices in PullClient and in TecCom in parallel. If you want to receive invoices in TecCom please stop the PullClient service. Invoices that have already been pulled will not be available for a second download, i.e. if a PullClient pulled invoices they cannot be downloaded again by TecCom.

    b. The organization under which you want to view the invoices must get in TecCom the right to download invoices form the TecInvoice service. The administrator must therefore activate **Download e-Invoices** under Administration/Organization. If the function is activated the invoices are pulled from the TecInvoice service and stored in TecCom according the configured journal storage duration.

    Note: When the administrator activates **Download e-Invoices** TecCom starts a request to the TecInvoice service and checks whether the TecInvoice configuration needed for the download of e-Invoices is available. If an error message is displayed the configuration is missing you should contact TecAlliance support (see a).

2. If you do not yet receive invoices from your supplier via the e-Invoicing (TecInvoice) service please contact your supplier.

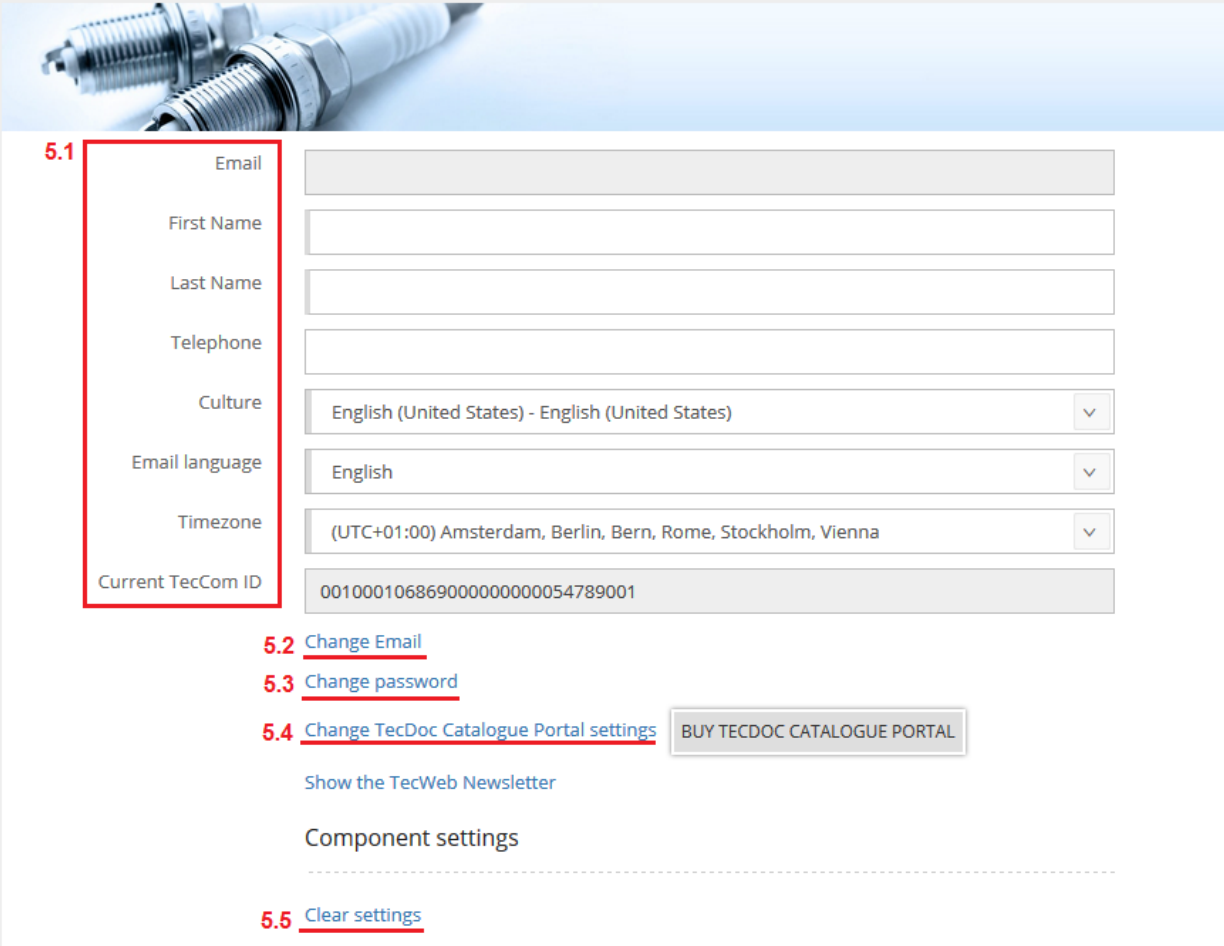Further information about the e-Invoices Journal you can find in section 8.5.

5 Edit your user profile

You can view and edit your own user data after logging in to TecCom. When editing your user profile you can:

- Change your full name and your phone number.
- Use the format selection to control the display of the date format and separators
- Select the language which only refers to e-mails received from TecCom.
- Change the time zone in your user profile (the dates in TecCom are converted to your time zone)
- You can also change your user e-mail address and your current password.
- If you have made many custom settings in TecCom, you can restore the default settings with a click.
- View the current TecCom ID
- Show the newsletter again.

Figure 12: Edit your user profile

5.1 Edit and check your user data

To view and edit your user data, press in the top right on your user e-mail address, which is blue. This will transfer you to your user profile.

E-mail: Displays your e-mail address which you want to use for signing in the TecCom.

First Name: Enter your first name here.

Last Name: Enter your last name here.

Telephone: Entering your phone number is optional. Enter the phone number where you can be reached. This telephone number can be viewed by other administrators of the organization.

Culture: Here you can select via drop down list your culture code to select the date format according to your preference.

Time zone: Select from the drop down list the time zone in which you are. According to the selection of the time zone, the time will be converted to your time zone.

Language: The language refers only to the language of the e-mails from TecCom.

⚠️ Here the choice of language does not control the display language of your TecCom. If you want to change the display language in TecCom, then please select the desired language on the log-in page.

5.2 Change your current e-mail address

In your user profile you can see your current e-mail address. This is the e-mail address for which you registered your user in TecCom and allows you to log in to TecCom.
If you want to change your current e-mail address, then click on the link **change e-mail** in your user profile. This takes you to a new page where you fill in the boxes below:

- **Current e-mail:** Here you can see your current user e-mail address for your registered user which you use to log in to TecCom.

- **New e-mail:** Enter your e-mail address which you want to use for signing in the Order Manager in the future.

- **Retype new e-mail:** Repeat the entry of your e-mail address. To avoid a wrong entry of the email address, for example by typos, no copy & paste is allowed for this field. The registration can only be completed successfully if you then activate your e-mail address through the registration confirmation e-mail.

Save your new e-mail address with **Save** or return with **cancel** to your user profile without having changed your e-mail address.

To activate the new e-mail address, follow the steps below:

Please confirm your new e-mail address

Once you have stored your desired new e-mail address in your user profile, you will receive a confirmation e-mail to your new e-mail address. This e-mail contains an activation link to confirm your new e-mail address and to finally store it for your user.
The link in the e-mail is active for 96 hours. Click during the 96 hours on the link to confirm your new e-mail address and to get to the login page, where you can log in with your new e-mail address for the first time.
If you do not click during the 96 hours on the link, you forfeit your change of the new e-mail address and your old e-mail address is retained for your user.

For security reasons, your new e-mail address for your user will be saved only after confirmation of the activation link in the e-mail.

As long as you have not confirmed your new e-mail address, you can log in as usual with your old e-mail address.

After confirming the new e-mail address with the activation link in the e-mail, you can log in only with the <u>new</u> e-mail address.

5.3 Change your current password

In your user profile, you can change the user password which you use for log in to TecCom together with your e-mail.
If you want to change your current password, then click on the link **Change Password** in your user profile.

Save your new password with **Save** or return with **Cancel** to your user profile without having changed your password.

If you have saved your new password, it is <u>immediately</u> active and you have to log in with your <u>new</u> password on the next time.

5.4 Change TecDoc catalog settings

Under this menu you can save your login information for the **TecDoc catalog**. This you must have previously requested at TecDoc / TecAlliance. If you have the access data, you can enter here your username and password.

This information is required for the menu Request & Order. If credentials are stored, you can fill your shopping cart directly with the positions of the TecDoc catalog, by clicking on the TecDoc button.

5.5 Restore default settings

If you have made many changes in your custom filters and display settings in your TecCom, you can restore the default settings easily with one click in your user profile.

Click on the link **Clear settings** in your user profile to restore the default settings.

6 Administration

Via the menu **Administration** you are **only as administrator** able to control the management of your Tec-Com and see the administration data.

The menu Administration is divided into the following sub menu items with the respective functions:

- **IFD Settings:** Here you can configure the IFD Import.
- **Organizations:** You can see your assigned organizations in the organization list. In addition, as administrator you can create new organizations for your user or edit your organizations. You can also remove an organization from your organizations. In addition, you can update the organization data on the TecAlliance Platform and set a new organization password.
- **User:** You can see and edit all users in the user list here, which are associated with your organization for which you are an administrator. You can also add new users to your organization and invite or remove existing users from your administration-organizations.   .
- **Ship-to:** If you want to create new ship-to addresses or edit existing, you can do that under this menu item.
- **Partner:** You can set partner relationships here or edit existing business relationships.

Below is a detailed explanation of the individual submenu items of Administration and all available functions are presented.

6.1 IFD Settings

The documentation for administration of your organizations is now here:
TecCom Wiki - IFD Settings

6.2 Organizations

The documentation for administration of your organizations is now here:
TecCom Wiki - Organizations

6.3 Setting up users

The documentation for administration of your users is now here:

TecCom Wiki - Users

6.4 Setting up ship-to

In the menu **Administration → Ship-to** you have the option to view, edit, and delete ship-to addresses of your organization. In addition, you can update the existing ship-to information when the data has changed in the database within your organization.

Figure 13: Edit ship-to

6.4.1 Create a new ship-to

Go to **Administration → Ship-to** and click there on **+ New** to create a new ship-to address.
A setup wizard is then opened.

Step 1 - Ship-to address
Enter the name of the new ship-to address, which can be assigned freely. However, it should be unique. Then enter the complete address of the new ship-to destination, by entering the address, zip code, location and choosing the country from the selection list. You create a new ship-to address with **Finish** or cancel the setup of the new ship-to, by clicking on the C**ancel** icon ⬛ on the top right in the setup wizard.

After the successful setup of the new ship-to, you find the ship-to in your list of existing ship-to addresses. In addition, you are able to edit the data later. Find more information under 6.4.2 Edit existing ship-to.

Figure 14: Create a new ship-to address

6.4.2 Edit an existing ship-to

Go to **Administration → Ship-to** to view all of your stored ship-to addresses in the list. You edit existing ship-to addresses, by selecting the relevant ship-to in the list. Below the ship-to list the details of the selected ship-to are opened.

In the tab **Supplier** you see the details of the supplier for which the ship-to address was created as default.

In the tab **Address** you find the address belonging to the ship-to. You can change the address, zip code, city and country, and save your changes by clicking on **Save**. If you want to discard the changes, click on **Cancel** and leave without saving.

6.4.3 Delete ship-to

To delete an existing ship-to, go to **Administration → Ship-to** and check the address that you want to delete in the ship-to list. Then click on **Delete**.

If you really want to delete the ship-to address, confirm with **Yes** in the message or return with **No** to the menu without deleting the ship-to address.

If the ship-to address is removed, it must be created again with **+ New**, if it is needed later again. See 6.4.1 Create a new ship-to.

6.5 Setting up partners

6.5.1 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.

6.5.2 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.

Figure 15: Add a Partner

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.

Figure 16: List of Partners

In the next step you enter buyer number 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.

Figure 17: Enter Buyer and Supplier Number

6.5.3 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 by the supplier.

Figure 18: Current Partners

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).

Figure 19: Partner Information

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.

Figure 20: Edit business relation

Please note

⚠	The option to associate Ship-to numbers to addresses in the partner administration replaces the previous possibility via "Administration > Ship-To".

You have the option for your users to define responsibilities per partner relationship. These responsibilities determine whether a user may execute requests and / or orders for the selected partner.

To determine such an option, please select a partner in the partner list and go to the tab **Responsibilities**. There you can either give all users the permission for requests and / or orders or for this partner or authorize only certain users.

Click on **Save** to save your settings. The user acts for the respective partner relationship only according to his responsibilities. The user may / may not execute requests and / or orders for this partner relationship.

Figure 21: Determine responsibilities for business relations

In the tab **Membership Profile** you can see a summary of the settings, if your supplier activated it.

6.6 TecCom connection to the cloud

As an administrator you have access to the cloud integration menu of TecCom. There, a list of available cloud solutions is shown. With a connected cloud you are able to download journal entries automatically and store them indefinitely, as well as upload IFD data files.

6.6.1 Dropbox

You can connect your organization by being redirected to the official Dropbox site (https://www.dropbox.com), by clicking on the blue **Connect** button. If you confirm the Dropbox access, you will be redirected back to TecCom, where the blue **Connect** button has changed to a red **Disconnect** button.

If you want to disconnect TecCom from the cloud, click on the red **Disconnect** button and confirm the selection. The red **Disconnect** button will change to a blue **Connect** button. Re-connecting the cloud is possible by clicking the button again.
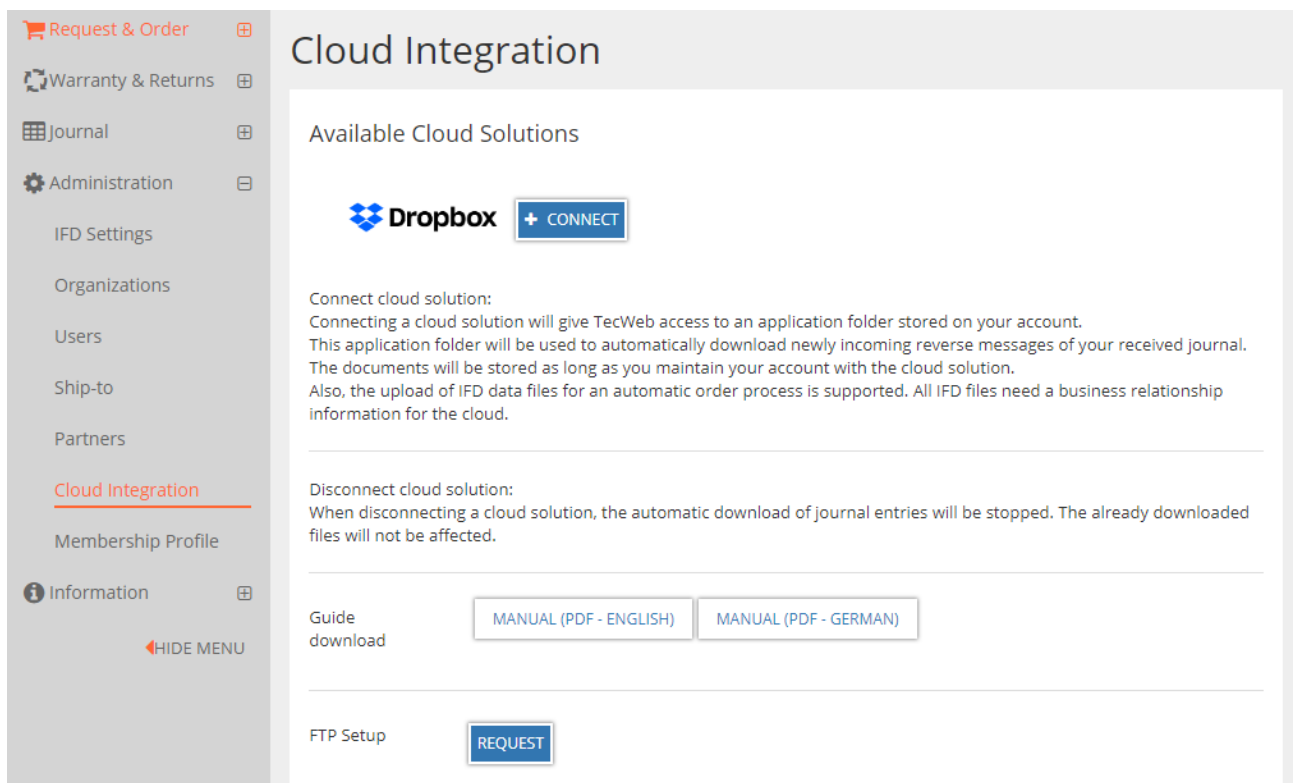

Figure 22: Cloud integration main page

A detailed manual is available in the cloud integration menu.

6.6.2 FTP

You can also connect your organization via an FTP server. You can request an FTP setup for this. To do so, click the Request button to open the FTP setup dialog

FTP Setup Request ☒

To receive the reverse messages of your journal directly into your ERP system, please fill out the following information. For the automatic file transfer a one-time setup fee and yearly fee are charged. The TecAlliance customer service will contact you for further price and contract details and to set up the automatic file transfer.

Contact

Name	Email	Telephone
Christian, Berdnik	christian.berdnik@tecalliance.net	1

Configuration

Protocol

FTP ▼

FTP-Server	Target Folder	Transfer Mode	FTP Mode
		binary ▼	Active ▼

SEND   CANCEL

Figure 23 FTP setup dialog

Please enter your name, email and phone number in the corresponding fields. In addition, our customer support requires the following technical information:

- Protocol: Select the desired transmission protocol here.
- FTP-Server: The FTP server address.
- Target Folder: The target folder for document upload/download on the ftp server.
- Transfer Mode: Choose your preferred ftp transfer mode. (ASCII or binary)
- FTP-Mode: Choose between active and passive ftp mode.

If you have questions regarding this technical information please contact you Administrator or IT department.

Click **SEND** to send your request to our customer support. Our customer support will contact you as soon as possible.

7 Request & Order

7.1 New Request or Order

You can find the documentation for the Request and Order functionality on our wiki page.

https://help-ordermanagerportal.tecalliance.net/en/Order/Request-And-Order

7.2 Shopping cart manager

You have the option to save the shopping cart directly as favorite with a new request or order. This allows a cart to be filled throughout the day and stored in between. The cart is stored here with no time limit. Only when the order has been sent, the cart is removed from the shopping cart list. With this menu item, the cart is opened, edited and deleted from the list. You also create from this menu item a new shopping cart.

Figure 24: Shopping cart manager

7.3 Favorite manager

You have the option to save the shopping cart directly as favorite with a new request or order. The favorite function is used as a practical template for recurring orders that carried out regularly. The cart is stored here with no time limit. By sending out an order, the favorite will not be deleted, as opposed to cart Manager. With this menu item, the favorite is opened, edited and deleted from the list. You also create from this menu item a new favorite.

Figure 25: Favorite manager

7.4 Import data file

Import Standard File:

Here you have the possibility to import data files for a new shopping cart.

Use the Excel form to select items manually for your order. Save the file in the CSV format (with separator semicolon) and upload the file with "Select Order File".

Import Order:

If you created an order file in your ERP system or catalog, you can upload it in the section "Import Order". You can also use the corresponding button "Select File" in your ERP system.

A maximum of 20 Shopping Carts can be created with an Import File.

Figure 26: Import data file

7.5 Utilization of (public) shopping carts and favorites

Shopping carts can be saved and used as **public** or non-public (private).

The administration of the shopping carts is done via the shopping cart and favorite manager:

- Private shopping carts and favorites can only be used by the user who created them.
- Public shopping carts and favorites are editable by all employees of the organization.

There are two ways for creating a favorite. You can either, create and save a shopping cart first, then convert it to a favorite, or save it directly.

These favorites are made available to other users through the "**public**" function. These templates can be revised or used directly for the creation and saving of public shopping carts. There is also the possibility to create private shopping carts from public templates.

From a saved template you can create an infinite amount of shopping carts.

After sending out a shopping cart (order), it is deleted from the shopping cart manager. The favorite template, on the other hand, is still stored after sending a shopping cart and is not deleted until it is deleted manually from the list.
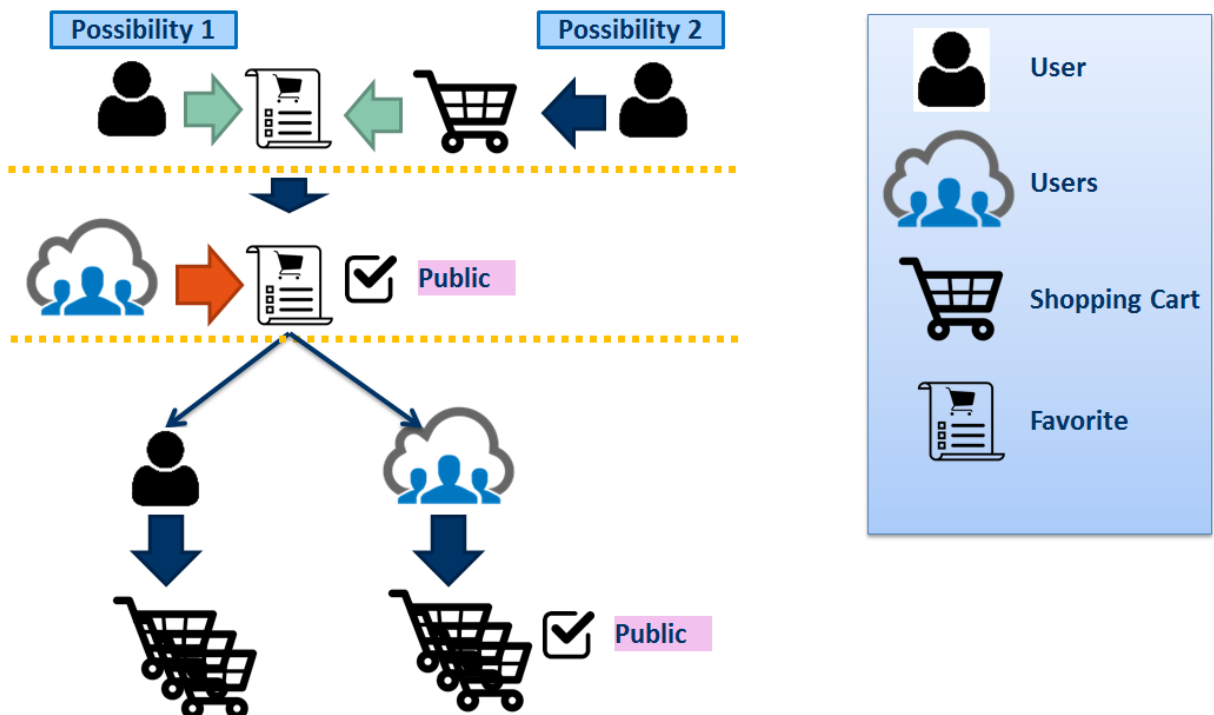

Figure 27: Examples of (public) shopping carts and favorites

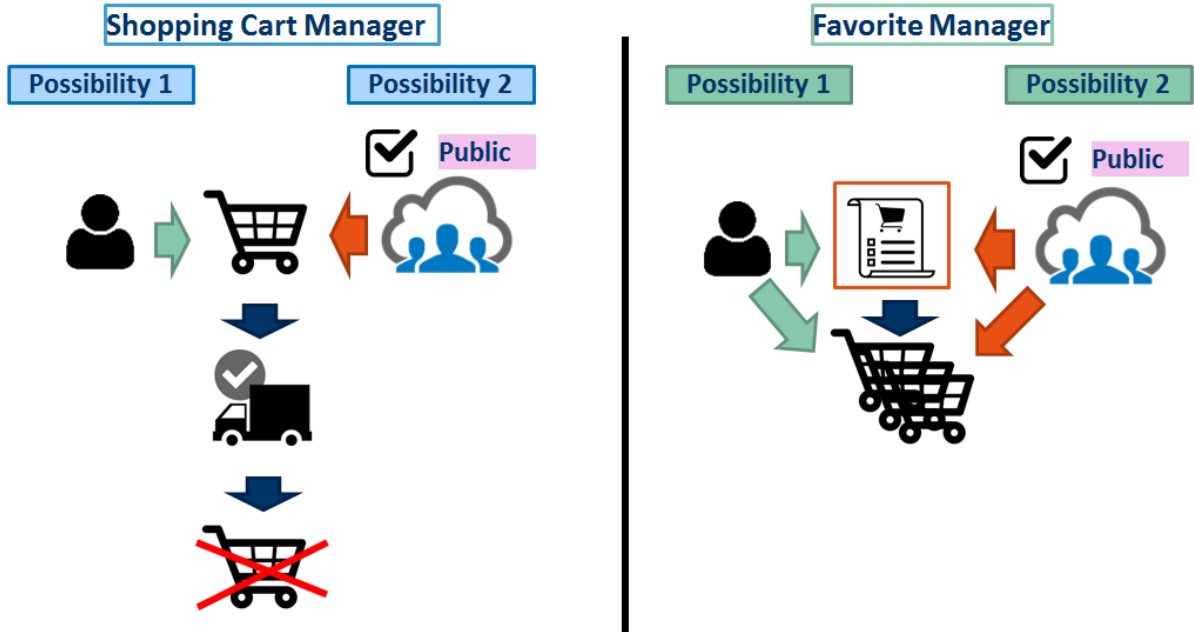# Shopping Cart and Favorite Manager

Figure 28: Examples of the manager function for (public) shopping carts and favorites

8 Journal

Under the menu **Journal** you see all your sent requests and orders, as well as all received documents regarding your orders and received e-invoices.

In the list view of the journal entries you quickly get an overview of your orders and documents. The journal entries are structured after the following submenu items:

- Outbound

- Received

- e-Invoices (for legally valid electronic invoices)

8.1 e-Invoices journal

In the menu item e-Invoices of the journal you find all your received invoices listed. As document types you can see invoice and credit note with different icons:

Invoice:

Credit note:

If you select a journal entry in the list view, you can view below of the list view the details of the selected invoice received.

In the tabs **Contents** and **Sender** you find more details regarding the content and the sender of your received invoice.

You can also open the invoice and corresponding invoice documents:

The invoice documents are stored in TecCom as PDF container files. A PDF container file is a file that includes several files. All invoice documents that belong to one invoice transaction (e.g. PDF document, structured data/TXML, signature file, verification report, index file) are stored as one PDF container file in TecCom.

If you click in the column **Documents** on the button of the respective line the PDF container file is opened in the PDF viewer installed. The PDF viewer must support the container or portfolio functionality as e.g. Acrobat Reader. When the PDF container is opened you can open the single documents included and also print them.

You have also the option to export invoice documents. Therefore, select the required journal entry or entries by selecting the checkbox and clicking on **Export**. For the export a ZIP file is created. Then a pop-up window will appear allowing you to open or save the ZIP file.

The ZIP file includes all invoice documents that belong to the selected journal entries. The ZIP file is structured and includes folders which contain all documents for the invoice transaction. The folder name is the transaction ID of the TecInvoice service. E.g.:
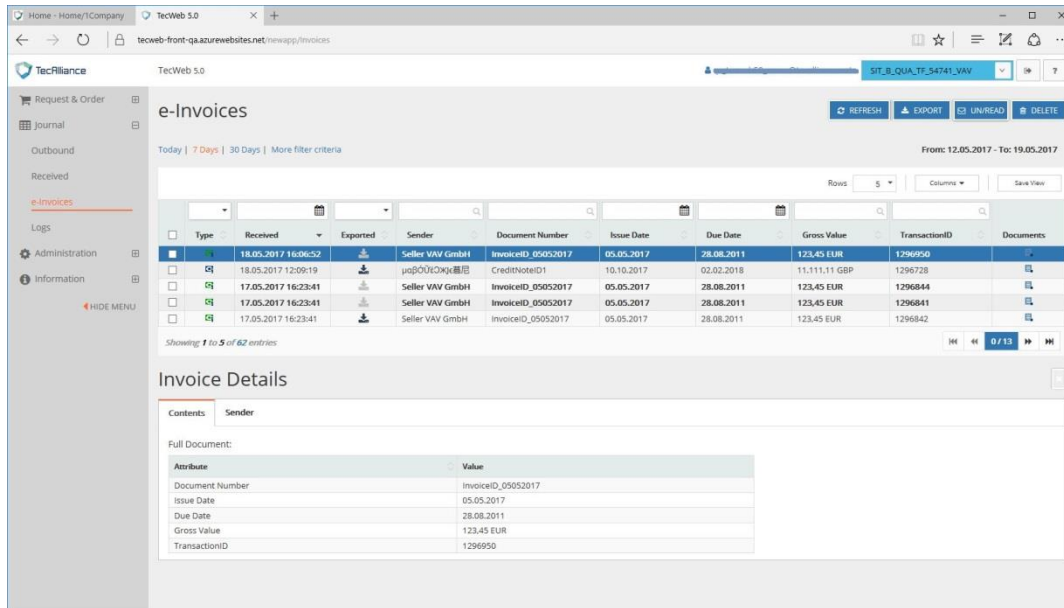
A maximum of 50 entries can be selected at once.

Figure 29: e-Invoices journal

8.2 Logs journal

For users the menu item **Logs** is shown under journal. If a cloud is connected (e.g. Dropbox) or e-Invoices are downloaded from TecInvoice service , error and information logs that are created during the automatic journal download or IFD orders, are displayed here.

The table has the following columns:

- Date/Time
- Type
- Content
- Error Code
- Source

The log files can be filtered and sorted by clicking on the column header. The **Content** column is not sortable and displayed in the language chosen at the login. By clicking on a line item, a detailed view of the log is opened below the table.
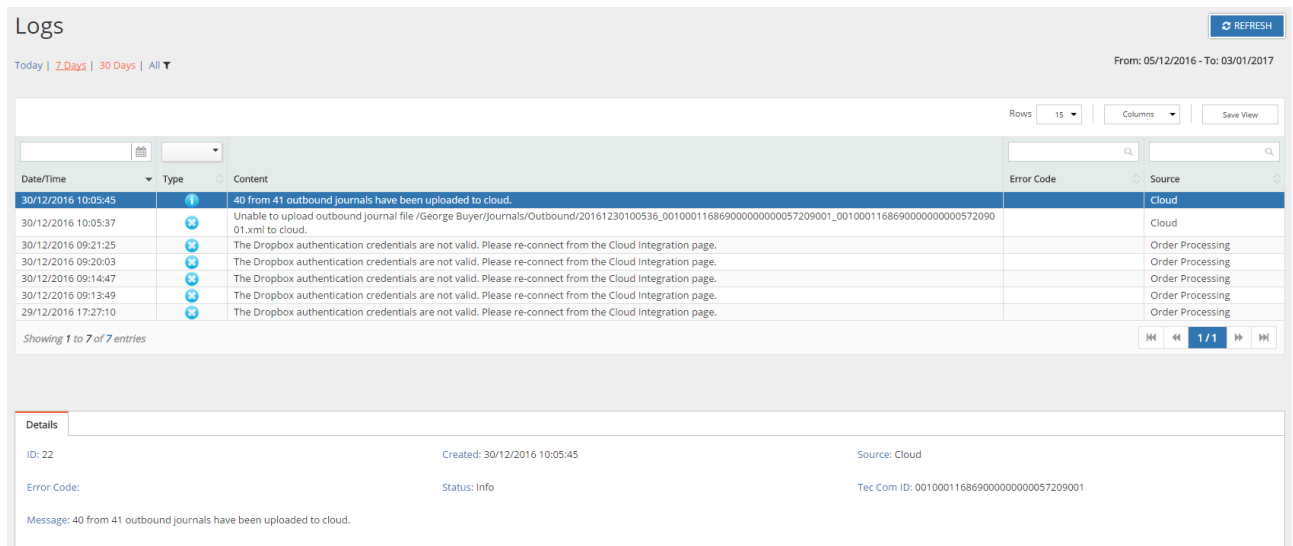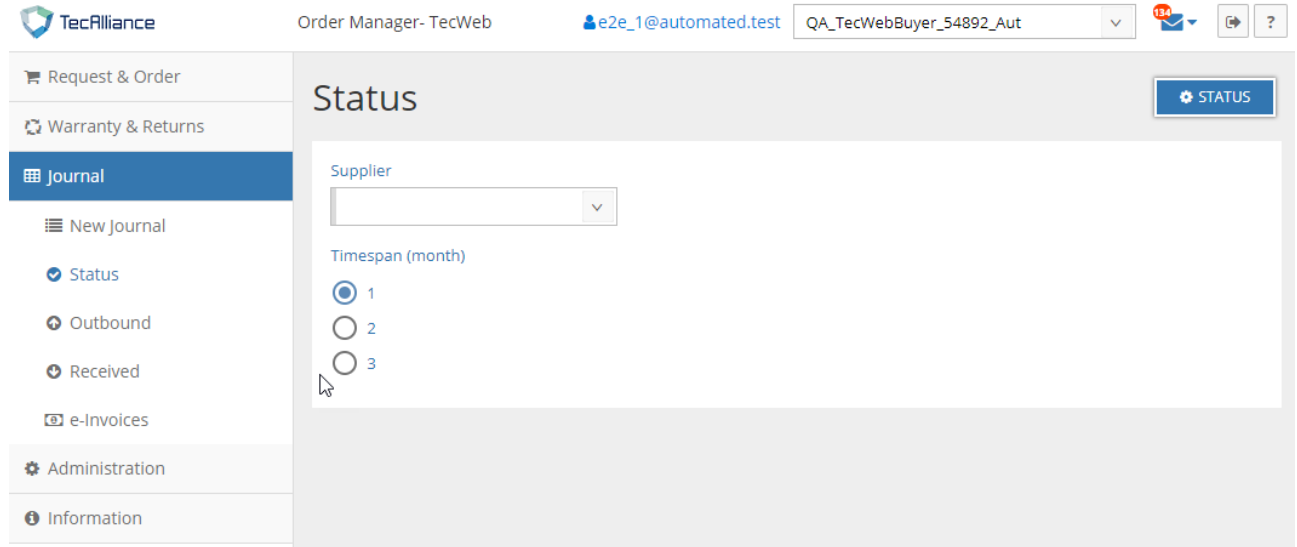

Figure 30: Logs Journal

9 New Journal

The documentation for the new journal is now here:

TecCom Wiki - New Journal

10 Status check

In the Menu under the entry Status you can perform a status check for all you orders of a specific supplier.

In the supplier drop down you can select the supplier and in the Timespan option you can choose a time span in month for the orders you want to check.

Click the Status button on the top left to send a status request to the selected supplier.

The status response is displayed below and will also be available in your journal (document type: 'Status check')
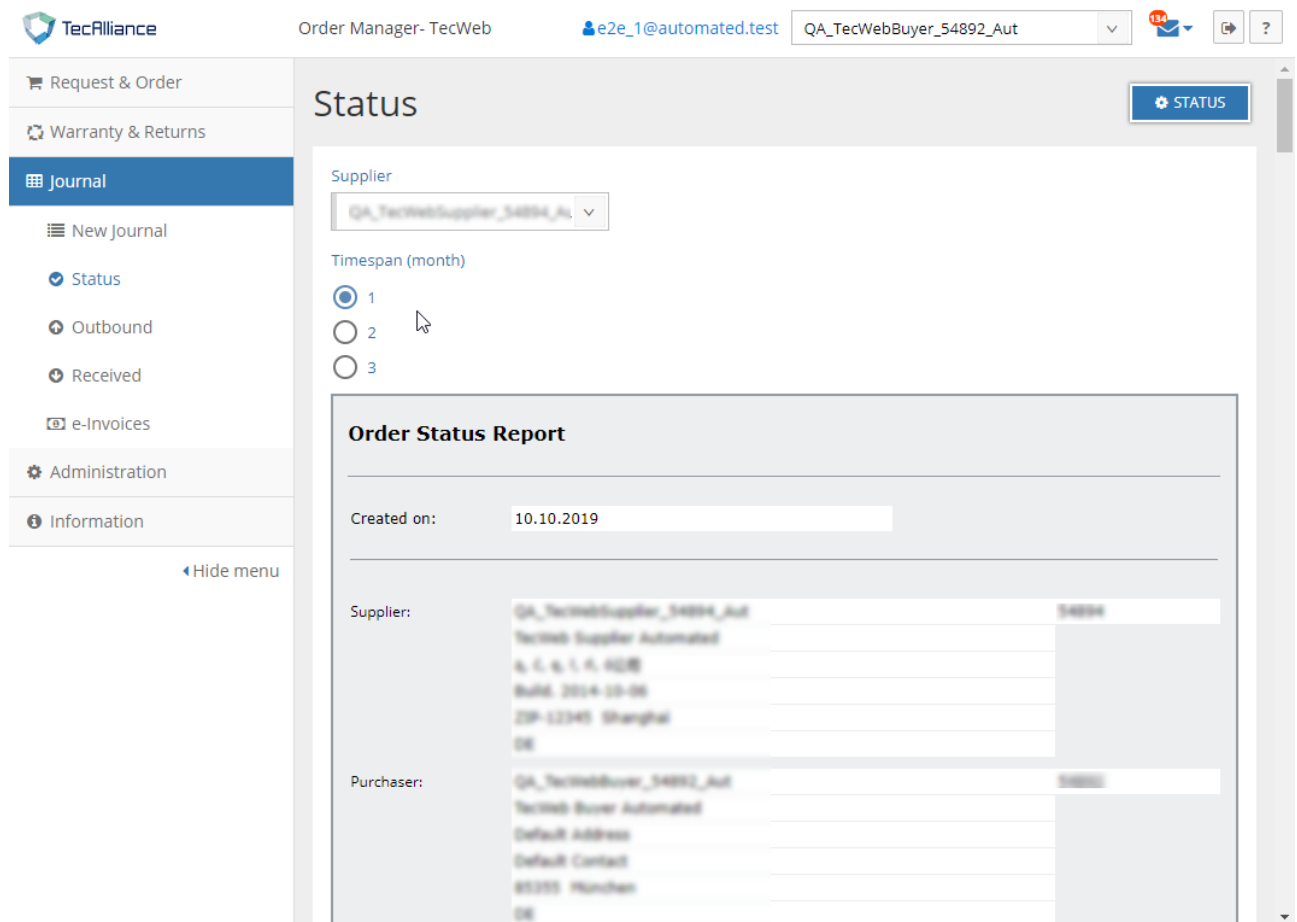
11 Improved business partner search with more information

TecWeb administrators (buyers and suppliers) are able to fill out information about their organization in the Membership Profile section. This information is displayed in the overview and details of the new Partner Search & Info section.

11.1 Partner Search & Info

This new menu entry allows the administrators for a better and more detailed partner search, to add new partners to the own business relationships. It is now possible to additionally search for utilized TecCom modules and supported business processes (reverse documents) and to exclude test organizations from the search. In the details all the business process information from My organization Profile is displayed.

11.2 My Organization Profile

To make the business process information transparent for the new search, please fill out the information in the new My Organization Profile settings section in the Membership Profile menu. There it is possible to display which TecCom modules and reverse documents are used, to add identification codes (EAN, Siret, VAT, GLN, DUNS), as well as the company description and logo plus additional contacts. Also the Membership Profile settings of suppliers are made visible for the new partner search.

My Organization Profile:

Improved business partner search with more information

Partner Search & Info:

43

12 Information

12.1 Release Notes

The actual and a history of all release notes are displayed on this page. You can find it in the menu under Information > Release Notes.

You can scroll and read of all our release notes.

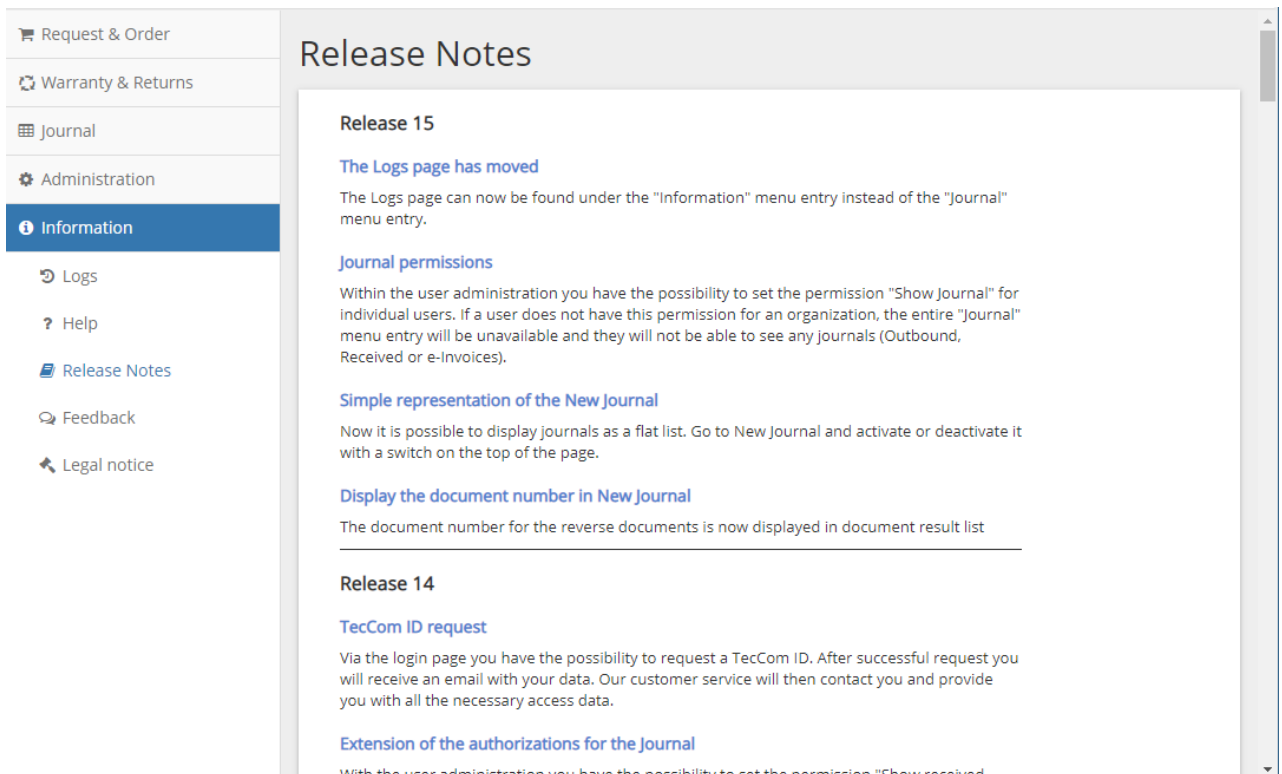(Figure 31 History of all release notes).

Figure 31 History of all release notes

13 Help Desk

https://help-ordermanagerportal.tecalliance.net/en/Help#help-desk