

Ascend New Buying Platform GEP SMART™ Supplier Training

Training instructions



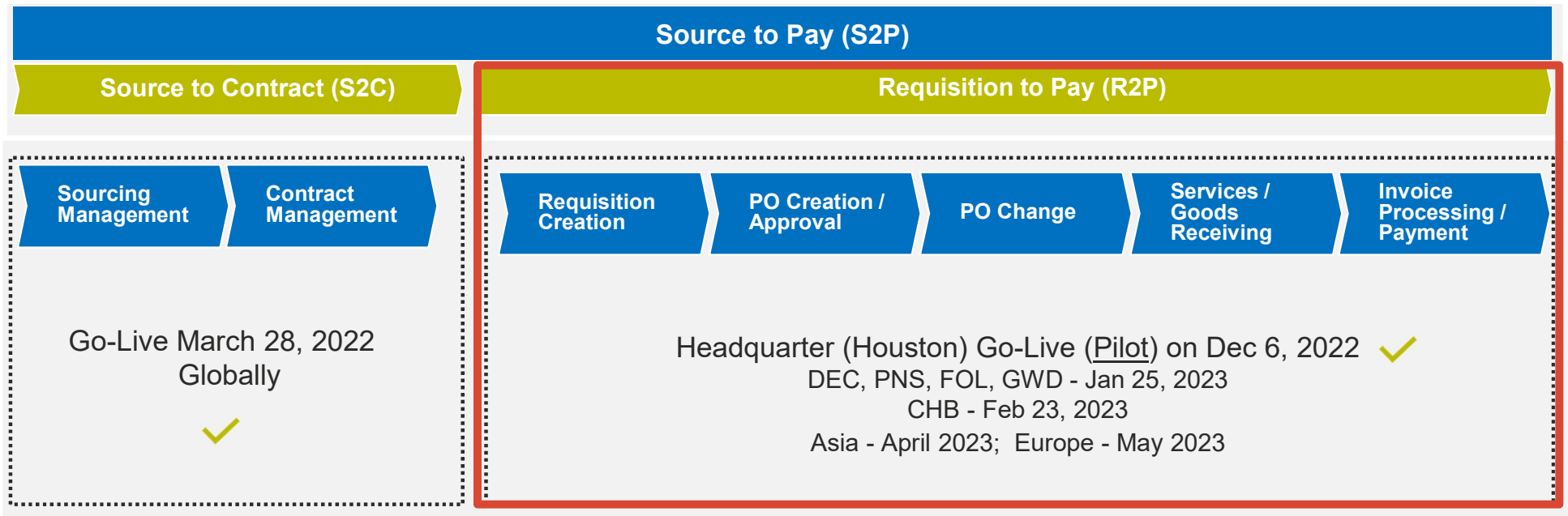
Please ensure your microphone is muted

Do not share confidential company information on this call

Use the chat box for your questions

Background

Implementing a new e-procurement tool called GEP. As part of this implementation, we will redesign our procurement processes and implement the new tool to improve our sourcing, contracting and buying capabilities.



Benefits of using GEP Smart

**Easier to do business
with Ascend (Portal)**

**Efficiency &
effectiveness**

No additional fees

- Real-time supplier information management
 - View / acknowledge purchase orders
 - Initiate a change order for POs
 - Create and submit service confirmation
 - Create and submit invoices & credit memos
 - Visibility of invoice approval and payment status
-
- Shortened invoice approval cycle times
 - Improved accuracy of orders
 - Invoice status monitoring
 - Historical view of transactions with Ascend
-
- No transactional / setup / license fees
 - Only need a web browser and internet connect to transact

What we'll cover today

Get Set Up

- Register on GEP SMART
- Edit Supplier Profile

Complete Transactions

- Acknowledge orders via email & portal
- Change request
- Service confirmation in Portal with ERS
- Invoice from Approved Service Confirmation
- Material invoice
- Credit invoice
- Subsequent Debit Note

Questions & Answers



Customer support

GEP Customer Support is available 24x5
support@gep.com

- Europe: +42 022 598 6501
- Switzerland: +41-445859014
- UK: +44-20-3478-6123
- USA: +1-732-428-1578
- Australia: +61-2-8518-1914
- Asia: +91-22-6137-2148

GEP SMART URL: smart.gep.com



Register on GEP SMART



Registration Request from Ascend


Supplier will confirm the point of contact (POC) details for GEP SMART Portal registration

Supplier will receive an email from support@gep.com

Supplier will need to click on the link provided in the email to complete and submit the registration form

GEP SMART: Primary Registration Request from Ascend

 smartuat@gep.com
To  Kunal Kadam

 If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Kunal Kadam,

Ascend has sent you the primary registration form. Request you to enter the responses and submit the form.

You can use the following link to access the form and take the required action: <https://smartuat.gep.com/Nexus/Registration/NewAccount?dd=YnBjPTcwMDIyMDQ3JmZjPTEmc3BjPTUzODk0MiZ0ej1FYXN0ZXJuIFN0YW5kYXJkiFRpbWU1&cl=en-US&cc=RIZEJADxjPvFme/IO4P6+w==&oloc=102&b=0&c=NzAwMjIwNDcl>

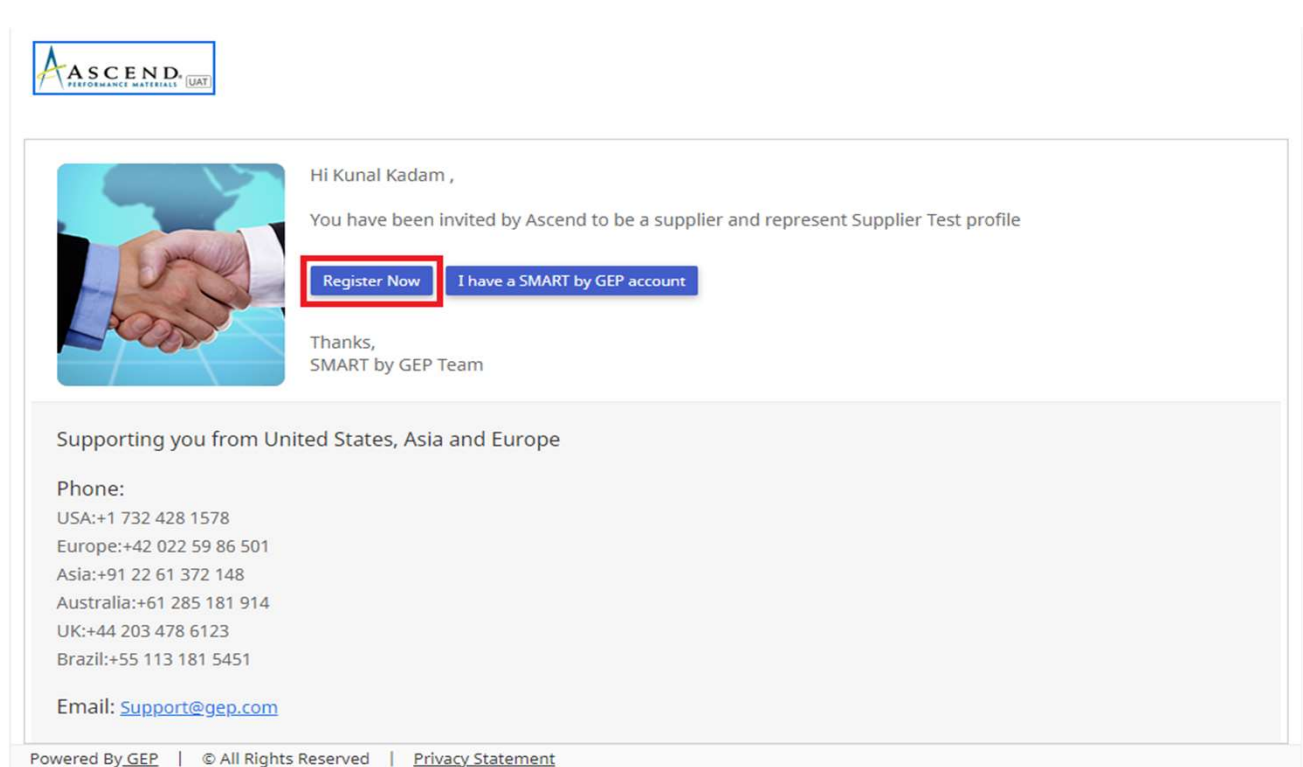
Thank you,
Supplier Management Team

Our GEP Customer Support Team is happy to help. Reach out to us at <https://success.gep.com/>.

Start registration on the GEP Smart Portal

Once you click **REGISTER NOW**, you will be directed to the primary registration form

*If you have registered for the GEP SMART Portal in the past, select **I HAVE A SMART BY GEP ACCOUNT***



The screenshot shows an email invitation from Ascend. At the top left is the Ascend logo with the tagline 'PERFORMANCE MATERIALS UAT'. The main content area features a blue header with a handshake icon and a world map. The text reads: 'Hi Kunal Kadam , You have been invited by Ascend to be a supplier and represent Supplier Test profile'. Below this are two buttons: 'Register Now' (highlighted with a red box) and 'I have a SMART by GEP account'. The email concludes with 'Thanks, SMART by GEP Team'. A grey footer section provides support information: 'Supporting you from United States, Asia and Europe', followed by phone numbers for USA, Europe, Asia, Australia, UK, and Brazil, and an email address 'Support@gep.com'. The bottom of the page contains the text 'Powered By GEP | © All Rights Reserved | Privacy Statement'.

Create user account credentials

Field marked with a red asterisk are mandatory to submit the Primary Registration Form.

1. Create a **USERNAME** that meets formatting requirements
2. Create a **PASSWORD** with a minimum of 10 characters (a combination of Upper&Lower case letters, numbers and special characters). Enter the password again to confirm it
3. Remaining fields are auto-populated on the form. Only primary contact information section needs to be edited for any corrections.
4. Remember to **CHECK** “I have read and agree to GEP Terms & Conditions & Privacy Policy”
5. Once you have completed all required fields like Accounting Credentials, Company Information & Primary Contact Information section then click **SUBMIT**

The screenshot displays the 'Primary Registration Form' with the following sections and fields:

- Basic Details:**
 - Username* (highlighted with a red box)
 - User Email* (kunal.kadam@gep.com)
 - Password* (highlighted with a red box)
 - Confirm Password* (highlighted with a red box)
 - Mobile Number
 - Select ISD Code
- Company Information:**
 - Legal Company Name: Test Profile
 - Doing Business As
 - Company Website
 - Headquarter* (Select Country)
 - Address Line 1 (Subs, Street, Locality)
 - Address Line 2 (Subs, Street, Locality)
 - City
 - State/Province
 - Zip/Postal Code
 - Company Phone* (Country)
 - Country
 - Fax
 - Business Regions
 - Category* (Consultants)
 - D-U-N-S Number (8 Digit D-U-N-S)
 - Company Identification (Select identification type - Identification Num)
- Primary Contact Information:**
 - First Name* (Kunal)
 - Last Name* (Kadam)
 - Company Email* (kunal.kadam@gep.com)
 - Primary Business Phone Number* (Extension)
 - Contact's Business Region
 - Contact's Category* (Consultants)
 - Time Zone (UTC-05:00 Eastern Time (US & Canada))
- Secondary Contact Information:**
 - First Name
 - Last Name
 - Company Email
 - Contact Role
 - ISD Code
 - Mobile Number

At the bottom, there is a checkbox labeled 'I have read and agree to GEP Terms & Conditions & Privacy Policy' (highlighted with a red box) and a 'Submit' button (highlighted with a red box).

Activate your account

1. Once you click on **SUBMIT** button.
2. You will receive an activation email at your registered email address from support@gep.com
3. Open the email and click on the link provided in the email to activate your GEP Smart Portal account.

GEP SMART: Activate Your Account



[i](#) If there are problems with how this message is displayed, click here to view it in a web browser.

Dear Kunal Kadam,

Thank you for filling the Registration Form. Before we can activate your account visit the following link: <https://smartuat.gep.com/Nexus/Registration/EmailVerification?ui=ZW09S3VuYWxfS2FkYW0mdWlkPTI0MTI4ODYmcGNjPTUzODk0MjA0MDAwMDAyJmV4YT0wJmJwYz03MDAyMjA0Nw2&oloc=102&b=0&c=NzAwMjIwNDcl&cl=en-US>

Note: You must complete above step, in order to use the GEP SMART.

Thank you,
Supplier Management Team

GEP SMART is a unified procurement software platform built for procurement professionals by procurement experts. Drive greater efficiency and performance with a comprehensive solution for direct and indirect procurement designed to streamline and automate all your source-to-pay processes.

Our GEP Customer Support Team is happy to help. Reach out to us at <https://success.gep.com/>.

Log in

Once the account is activated, you will be redirected to the GEP Smart login screen:

A: Enter your **USERNAME** created at registration

B: Enter your **PASSWORD** created at registration

C: Click on **LOGIN** button, to login to GEP SMART

To access GEP SMART in the future: <https://smart.gep.com>



The screenshot shows the GEP login interface. At the top center is the GEP logo. Below it are three main elements highlighted with red boxes and labeled A, B, and C:

- A:** A text input field for the username, containing the placeholder text "Username" and a user icon. Below the field is a link that says "Forgot Username?".
- B:** A text input field for the password, containing the placeholder text "Password" and a key icon. Below the field is a link that says "Forgot Password?".
- C:** A large blue button with the text "LOGIN" in white capital letters.

At the bottom of the page, there are logos for "GEP | NEXE", "GEP | SMART", and "GEP | CLICK" separated by dots. Below these logos is the copyright notice "© Copyright GEP 2021".

Retrieve username and password

In case you don't have your username or password:

1. Select either the **FORGOT PASSWORD** or **FORGOT USERNAME** option
2. Enter username or email in the appropriate field and click **SUBMIT**
3. You will receive a pop-up message indicating the next steps
4. The username details or link to reset password will be emailed to the email address on record for your account

The screenshot shows the GEP login interface. At the top is the GEP logo. Below it are two buttons: 'Forgot Password' and 'Forgot Username', both highlighted with red boxes. Underneath is an email input field with a placeholder '@ Enter Email (example@xxx.com)'. Below the input field are two buttons: 'SUBMIT' and 'CANCEL'. At the bottom, there are logos for GEP | NEXE, GEP | SMART, and GEP | CLICK, along with the copyright notice '© Copyright GEP 2021'.

The screenshot shows the GEP login interface. At the top is the GEP logo. Below it are two input fields: 'Username' and 'Password'. Each field has a 'Forgot' link below it: 'Forgot Username?' and 'Forgot Password?', both highlighted with red boxes. Below the input fields is a large blue 'LOGIN' button. At the bottom, there are logos for GEP | NEXE, GEP | SMART, and GEP | CLICK, along with the copyright notice '© Copyright GEP 2021'.

Edit Supplier Profile

Update Contact Information on Supplier Profile

A. Click on the **SUPPLIER PROFILE** Icon on the left side of screen.

B. Select **CONTACT INFORMATION** from the options on the left or scroll down to the **CONTACT INFORMATION** tab.

The screenshot displays the ASCEND Supplier Profile interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'More'. A search bar is present on the right. The left sidebar contains navigation options: Home, My Tasks (10), Create, and Supplier Profile (A). The main content area shows the profile for 'SUPPLIERKK (PC-2022.000174)' with a status of 'INACTIVE'. The 'CONTACT INFORMATION' tab is selected (B). The 'BASIC DETAILS' section is expanded, showing a list of fields with asterisks indicating required fields:

- Supplier's Legal Name* (SupplierKK)
- Parent Company's Identity (Parent Company Name)
- Doing Business As
- Formerly Known As (Formerly Known As)
- Region* (Asia)
- Supplier Managers* (Lokendra Singh)
- Status (Inactive)

Additional fields include 'Parent Company Name' and 'Category*' (Consultants +10 More). A 'YOUR COMPANY LOGO HERE' section is also visible, with supported file formats (png, jpeg, jpg) and a maximum file size of 5MB. The resolution is specified as 200 X 200 pixel.

Update Contact Information on Supplier Profile

A. In the **CONTACT INFORMATION** tab, click on **ADD NEW CONTACT** icon to add new contact.

B. In the Add New Contact Form, add **FIRST NAME, LAST NAME, EMAIL ADDRESS, AND PHONE NUMBER.**

C. Once all the mandatory details are entered, click on **SAVE** from the bottom.

CONTACT INFORMATION (2) (1 Registered, 1 Non Registered) **A** ⊕ Add New Contact

*indicates required fields

All	Registered	Pending Activation	Invited	Non-Invited
2	1	0	1	0

Full Name	Status	Email ID	Language	Primary Phone No.
<input type="checkbox"/> Kunal Kadam	Registered	kunal.kadamxyz@gep.com	English American	2345678
<input type="checkbox"/> Dilip V	Invited	dilip.vishwambharanxyz@gep.com	English American	12234

Add New Contact

*indicates required fields

B **B** **B**

You must enter a value for the attribute

Designation (Optional) Default Role Please Select

B Extn Secondary Business Phone (Optional) Extn Fax No.

ISD Code (Optional) Please Select Mobile Number (Optional)

Send Invitation CANCEL **C** SAVE

Update Contact Information on Supplier Profile

A. The added contact will be shown under the **CONTACT INFORMATION** tab.

B. The current Primary Contact will be highlighted in blue.




C. To change the primary contact, click on the **SUPPLIER ICON** against the contact which needs to be marked as the new Primary Contact.

Note: Once you change the Primary Contact, the supplier icon for the new contact will be highlighted in blue.

CONTACT INFORMATION (3) (1 Registered, 2 Non Registered) + Add New Contact

*indicates required fields

All	Registered	Pending Activation	Invited	Non-Invited
3	1	0	1	1

Full Name	Status	Email ID	Language	Primary Phone No.
<input type="checkbox"/> Kunal Kadam	B  Registered	kunal.kadamxyz@gep.com	English American	2345678
<input type="checkbox"/> Dilip V	C  Invited	dilip.vishwambharanxyz@gep.com	English American	12234
A <input type="checkbox"/> Dummy Contact	 Non - Invited	xyz@xyz.com	English American	12345

1 to 3 of 3 ⏪ < > ⏩ Page 1 of 1

Note: The order will go to primary contacts on the supplier profile

Update Contact Information on Supplier Profile

A. To delete an existing contact, click on the **CHECKBOX** against the contact you wish to delete.

B. Click on the **TRASH CAN** icon to delete the contact

C. You will get a prompt. Click **YES** to proceed.

CONTACT INFORMATION (3) (1 Registered, 2 Non Registered) + Add New Contact

*indicates required fields

All	Registered	Pending Activation	Invited	Non-Invited
3	1	0	1	1

B

Full Name	Status	Email ID	Language	Primary Phone No.
<input type="checkbox"/> Kunal Kadam	Registered	kunal.kadamxyz@gep.com	English American	2345678
A <input type="checkbox"/> Dilip V	Invited	dilip.vishwambharanxyz@gep.com	English American	12234
<input checked="" type="checkbox"/> A Dummy Contact	Non - Invited	xyz@xyz.com	English American	12345

B

? CONFIRMATION

Do you want to Delete selected Contacts ?

C

NO YES

Update Contact Information on Supplier Profile

D. Once the contacts are added/deleted/updated OR other required changes are made on the supplier profile, click on **SAVE** on the bottom of the screen.

The screenshot displays the 'Supplier Profile' page for 'SUPPLIERKK (PC-2022.000174)'. The page is currently 'INACTIVE'. The left sidebar contains navigation options: Home, My Tasks (10), Create, and Supplier Profile. The main content area shows the 'CONTACT INFORMATION' section, which is expanded to show 3 contacts (1 Registered, 2 Non Registered). A summary bar indicates: All 3, Registered 1, Pending Activation 0, Invited 1, Non-Invited 1. Below this is a table of contacts:

Full Name	Status	Email ID	Language	Pr
<input type="checkbox"/> Kunal Kadam	Registered	kunal.kadamxyz@gep.com	English American	234
<input type="checkbox"/> Dilip V	Invited	dilip.vishwambharanxyz@gep.com	English American	122
<input type="checkbox"/> Dummy supplier	Non - Invited	xyx@xyz.com	English American	123

At the bottom right of the screen, there are 'CLOSE' and 'SAVE' buttons. The 'SAVE' button is highlighted with a red box.

Order Acknowledgement

(Via Email and GEP SMART Portal)

Acknowledge an order via Email

You will receive an email from support@gep.com and order details will be attached as a PDF file

The supplier can acknowledge an Order in two ways:

A: To review the order further before acknowledging it, click on the provided link to log in to **GEP SMART** using your credential.

OR

You can view the order by clicking on the PDF file attached with the mail.

B. To acknowledge the order, click **ACKNOWLEDGE** button.

C. You will get the acknowledgement message which will say **Order Acknowledged Successfully**



smartuat@gep.com
To Kunal Kadam

Follow up. Start by Wednesday, March 30, 2022. Due by Wednesday, March 30, 2022.
If there are problems with how this message is displayed, click here to view it in a web browser.

PO-0322-000694.pdf
235 KB

Dear Kunal Kadam,

This is a reminder that an order received is pending acknowledgement.

Here are the details:

Order Name: Order1 for Test PO 1 - Supplier KK
Order Number: PO-03:22-000694
Buyer Company Name: Ascend
Currency: \$
Order Amount: 100.00

You can use the following link to access the application, review the order and acknowledge the order: <https://smartuat.gep.com/Order/ManageOrder/create?dd=YnBjPTcwMDIyMDQ3JmRjPTU1MTgmc3BjPTUzOTAxNg2&oloc=107&cc=GvUgov/QE9HT2SLK861LUQ==&b=0>

Alternately, use the button below to acknowledge the order.

Acknowledge

Thank you,
GEP SMART Team
Our GEP Customer Support Team is happy to help. Reach out to us at <https://success.gep.com/>.

Acknowledge an order via GEP SMART Portal

To acknowledge an order, login to **GEP SMART**, then:

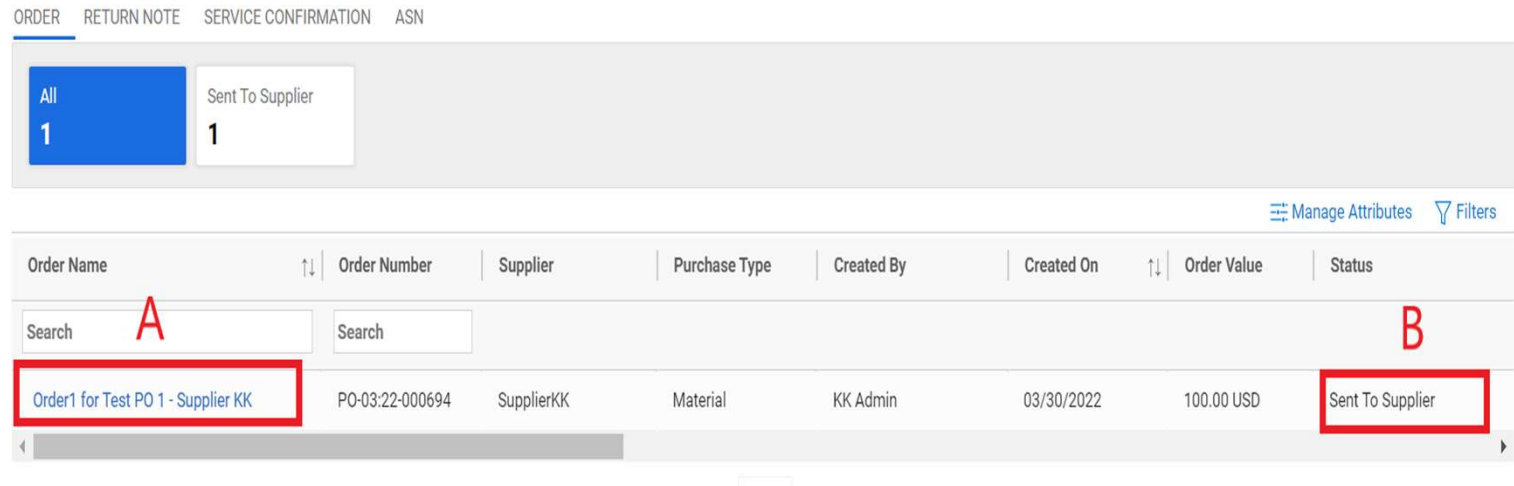
Click on the **PURCHASING** tab on top

The screenshot shows the GEP SMART Portal interface. The top navigation bar includes the ASCEND logo and tabs for Catalog, Sourcing, Contract, **Purchasing** (highlighted with a red box), Invoice, and Supplier. A search bar and user profile icon are also visible. The main content area is titled 'Documents' and features a sub-navigation bar with 'ORDER', 'RETURN NOTE', 'SERVICE CONFIRMATION', and 'ASN'. Below this, there are two summary cards: 'All 1' and 'Sent To Supplier 1'. A table below displays a list of documents with columns for Order Name, Order Number, Supplier, Purchase Type, Created By, Created On, Order Value, and Status. The table contains one row: 'Order1 for Test PO 1 - Supplier KK', 'PO-03:22-000694', 'SupplierKK', 'Material', 'KK Admin', '03/30/2022', '100.00 USD', and 'Sent To Supplier'. The bottom of the table shows 'Rows Per Page: 10' and '1 - 1 Of 1'.

Acknowledge an order via GEP SMART Portal

A: Click on the order to acknowledge

B: Before you can acknowledge, be sure the status says **SENT TO SUPPLIER**



ORDER RETURN NOTE SERVICE CONFIRMATION ASN

All 1 Sent To Supplier 1

Manage Attributes Filters

Order Name	Order Number	Supplier	Purchase Type	Created By	Created On	Order Value	Status
Order1 for Test PO 1 - Supplier KK	PO-03:22-000694	SupplierKK	Material	KK Admin	03/30/2022	100.00 USD	Sent To Supplier

Acknowledge an order via GEP SMART Portal

A: The order will open with **SENT TO SUPPLIER** status

Review the details of the Order within the **LINE DETAILS** section, which is the last section of the order at the bottom.

B: Click **ACKNOWLEDGE ORDER** on the bottom right-hand corner if everything looks okay

The screenshot displays the GEP SMART Portal interface for an order. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The 'Purchasing' tab is active. The order title is 'ORDER: Order1 For Test PO 1' with a status of 'Sent To Supplier' (indicated by a red box and a red 'A'). The currency is '100.00 USD' and there are options for 'Comments and Attachments' and 'More'.

The main content area is divided into two sections: 'BASIC DETAILS' and 'SUPPLIER DETAILS'. Both sections have a 'Manage Optional Fields' link.

BASIC DETAILS:

* Indicates mandatory fields			
Order Number	Order Name	Order Contact	Order Author
PO-03:22-000694	Order1 for Test PO 1 - Supplier KK	KK Admin	KK Admin
Purchase Type	Creation Date	Original Issue Date	Supplier Acknowledged Date
Material	03/30/2022	03/30/2022	--
Currency			
USD			

SUPPLIER DETAILS:

* Indicates mandatory fields			
Supplier Name	Supplier Code	Ordering Location	Supplier Contact
SupplierKK	PC-2022.000174	--	Kunal Kadam

At the bottom right, there is a red box around the 'Acknowledge Order' button (indicated by a red 'B'). A 'Print Preview' button is visible at the bottom left.

Acknowledge an order via GEP SMART Portal

After you acknowledge the order, the status will display as **SUPPLIER ACKNOWLEDGED**

Click in to **Comments & Attachments** for any PO supporting documentation that may have been included.

The screenshot displays the GEP SMART Portal interface for an order. The order title is "ORDER: Order1 For Tes..." and the status is "Supplier Acknowledged". The currency is set to "100.00 USD". A "Comments and Attachments" button is visible in the top right corner. The main content area is divided into two sections: "BASIC DETAILS" and "SUPPLIER DETAILS".

* Indicates mandatory fields			
Order Number	Order Name	Order Contact	Order Author
PO-03:22-000694	Order1 for Test PO 1 - Supplier ...	KK Admin	KK Admin
Purchase Type	Creation Date	Original Issue Date	Supplier Acknowledged Date
Material	03/30/2022	03/30/2022	03/30/2022
Currency			
USD			

At the bottom of the screen, there is a "Print Preview" button on the left and a "CREATE INVOICE" button on the right.

Type Of Order

Ascend Team creates 3 types of purchase orders in GEP SMART:

1. Material type PO
2. Service/Blanket type SO
3. Recurring Payment PO

Request Change to an Order

Request change to an order

To initiate a change request, open the **PURCHASE ORDER**

A: The order must be in **SENT TO SUPPLIER** status to initiate a change request.

B: Click on the **MORE ACTIONS** in the upper right-hand corner

*If you have already acknowledged the order, please reach out to your **Order Contact** directly and they will need to create the change order on their side*

The screenshot displays the ASCEND UAT Purchasing interface for an order titled "ORDER: Order1 For Test PO 6...". The order status is "Sent To Supplier", indicated by a red box and a red letter 'A'. The interface includes a navigation menu on the left with options like Home, My Tasks, Create, and Supplier Profile. The main content area is divided into sections: "BASIC DETAILS", "SUPPLIER DETAILS", and "INCO TERMS". Each section contains a table of order-related information. A "More" button is highlighted in a red box in the top right corner, with a red letter 'B' next to it. The bottom of the interface features a "Print Preview" button and an "Acknowledge Order" button.

BASIC DETAILS					
* Indicates mandatory fields					
Order Number	Order Name	Order Contact	Order Author	Purchase Type	Creation Date
PO-04:22-000812	Order1 for Test PO 6 - Supp...	KK Admin	KK Admin	Material	04/20/2022
Original Issue Date	Supplier Acknowledged Date	Currency			
04/21/2022	--	USD			

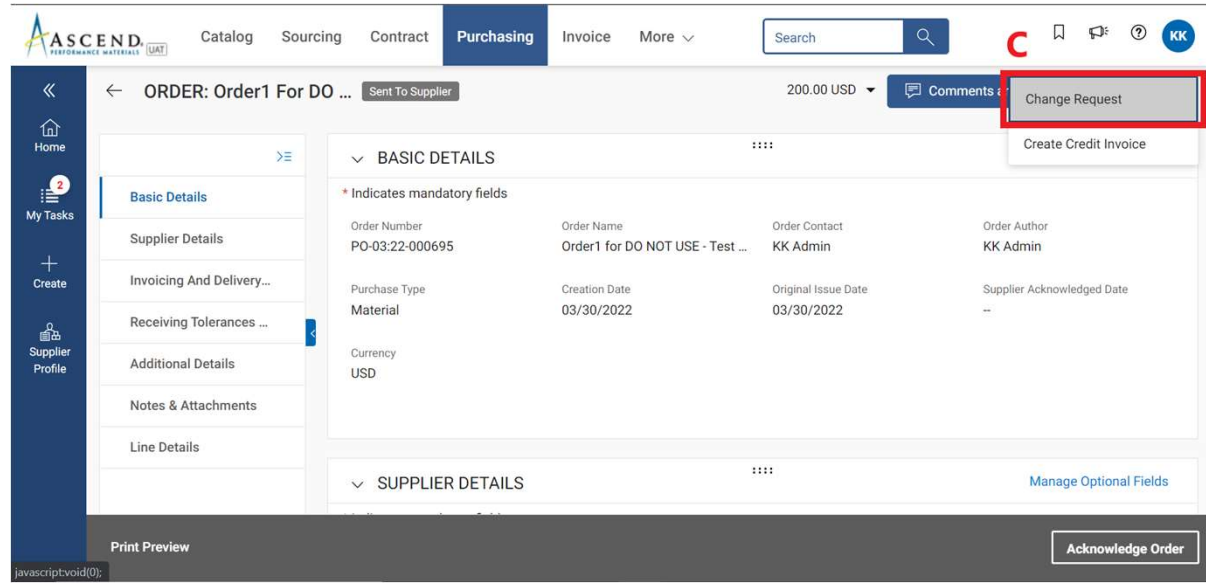
SUPPLIER DETAILS					
* Indicates mandatory fields					
Supplier Name	Supplier Code	Ordering Location	Supplier Contact	Payment Terms	Dispatch Mode
SupplierKK	PC-2022.000174	LC-2022.000021 Copy of H...	Kunal Kadam	Payment at sight	Portal

INCO TERMS					
* Indicates mandatory fields					

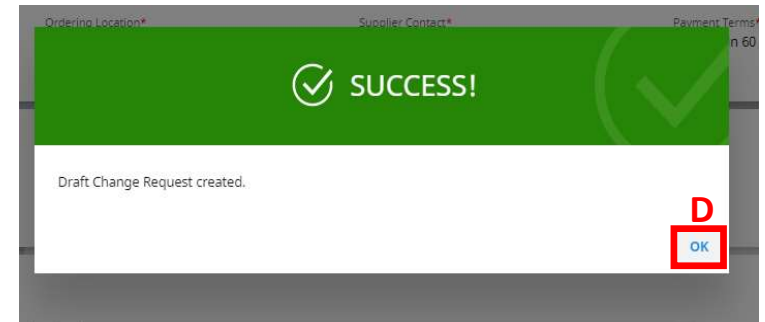
Request change to an order

C: Select **CHANGE REQUEST**

D: A prompt will appear. Click **OK** to continue



The screenshot shows the ASCEND purchasing system interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'More'. The main header displays 'ORDER: Order1 For DO ...' with a 'Sent To Supplier' status and a value of '200.00 USD'. A 'Comments' button is visible, and a 'Change Request' button is highlighted with a red box. Below the header, the 'BASIC DETAILS' section is expanded, showing fields for Order Number (PO-03:22-000695), Order Name (Order1 for DO NOT USE - Test ...), Order Contact (KK Admin), Order Author (KK Admin), Purchase Type (Material), Creation Date (03/30/2022), Original Issue Date (03/30/2022), and Currency (USD). The 'SUPPLIER DETAILS' section is also visible. At the bottom, there are 'Print Preview' and 'Acknowledge Order' buttons.



The screenshot shows a success message dialog box. The message reads 'Draft Change Request created.' and an 'OK' button is highlighted with a red box. The dialog box has a green header with a checkmark icon and the word 'SUCCESS!'.

Request change to an order

E: The order will open in **DRAFT** status

To make changes, scroll down to the **LINE DETAILS** section

F: You can update **QUANTITY** and **UNIT** price

G: If the fulfillment date needs to be updated, provide the date in the **PROMISED DATE** field

Note: You can also update the taxes & freight charges under line level if needed.

The screenshot displays the ASCEND purchasing system interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The 'Purchasing' tab is active, and the order status is 'Draft', highlighted with a red box and labeled 'E'. The order title is 'ORDER: Order1 For DO NOT USE'. The 'BASIC DETAILS' section shows 'Order Number: PO-03:22-000695', 'Order Name: Order1 for DO NOT USE - Test PO 2 - ...', 'Order Contact: KK Admin', and 'Order Author: KK Admin'. The 'SUPPLIER DETAILS' section shows 'Supplier Name', 'Supplier Code', 'Ordering Location', and 'Supplier Contact'. The 'LINE DETAILS' section is expanded, showing a table with columns for 'Line', 'Line De...', 'Type', 'Quantity', 'Unit Price', 'Promised Date', and 'Suppl'. The 'Quantity' and 'Unit Price' fields for line 1 are highlighted with a red box and labeled 'F', showing values of 2.00 and 200.00 respectively. The 'Promised Date' field is highlighted with a red box and labeled 'G', showing a date input field with the format 'MM/DD/YYYY'. The interface also includes a search bar, 'Manage Columns', 'Apply to All', and 'Show Filters' options.

Request change to an order

H: Click on the **COMMENTS** icon to summarize the changes you are requesting in order to clarify the updates to the approver

I: Once the changes are made, click on **SEND TO BUYER** in the bottom right-hand corner

J: You will be redirected to the **ORDER** page and the status of the order will show as **SENT TO BUYER**

***Once the Change request has been created, Ascend team need to approve the change for which you need to acknowledge the order & the order number will be added with -001 at the end*

The screenshot shows the Ascend Purchasing interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The main content area displays order details for 'ORDER: Order1 For DO NOT US..' with a status of 'Draft' and a value of '200.00 USD'. The 'COMMENTS and Attachments' button is highlighted with a red box (H). The 'SEND TO BUYER' button is also highlighted with a red box (I).

Document Name	Document...	Supplier	Purch...	Created By	Created On	Total Va...	Status
DO NOT USE - SET TEST	PO-08:21-0004...	SET_Test	Standard	Ruwaab Thakkar	08/16/2021	310.00 USD	Sent To Buyer J
DO NOT USE - SET TEST	PO-08:21-0004...	SET_Test	Standard	Ruwaab Thakkar	08/16/2021	323.80 USD	Supplier Acknowledged

Order Statuses

- **Draft:** Change request is created by supplier; however, it is not submitted to Ascend (work-in-progress)
- **Sent to Supplier:** Order is sent to supplier and ready for review
- **Supplier Acknowledged:** Order has been accepted and acknowledged by the supplier
- **Sent to Buyer:** A change request has been created by the supplier and is been sent to Ascend Team for approval

Create Service Confirmation with Automatic Invoice Creation Process (ERS)

What is a service confirmation?

A **Service Confirmation** is a document created by a supplier once services are rendered with ERS (Evaluated Receipt Settlement) feature available to automat the invoicing process. Once a service confirmation with ERS flag is approved, invoice will be created automatically in GEP SMART.

It is relevant only on a **Blanket / Service Order** and must be done before creating an invoice.

NOTE: Service confirmations can only be created once the order is in **Supplier Acknowledged Status**.

If the order is in **Sent to Supplier** status, you will first need to acknowledge the order before creating the service confirmation.

Create a service confirmation

A: Click on the Purchasing tab & select the **Order** against which you wish to create the Service confirmation

The screenshot shows the ASCEND GEP SMART interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing' (highlighted with a red box), 'Invoice', and 'Supplier'. A search bar is on the right. The left sidebar contains 'Home', 'My Tasks', 'Create', and 'Supplier Profile'. The main area is titled 'Documents' and has tabs for 'ORDER', 'RETURN NOTE', 'SERVICE CONFIRMATION', and 'ASN'. The 'ORDER' tab is active. Below the tabs, there are filter buttons: 'All' (10), 'Supplier Acknowledged' (7), and 'Sent To Supplier' (3). A table of orders is displayed with columns: Order Name, Order Number, Supplier, Purchase Type, Created By, Created On, Order Value, and Status. The second row of the table is highlighted with a red box and a red 'A' next to the Order Number.

Order Name	Order Number	Supplier	Purchase Type	Created By	Created On	Order Value	Status
Batch Order1 for 0058058095-10-13925286	4100002449		Blanket/Service	Youssef Badran	11/01/2022	9750.00 USD	Supplier Acknowledged
Batch Order1 for 0057965916-80-GDLOTH78...	4100002386		Blanket/Service	Tivi Horvath	10/24/2022	15500.00 USD	Supplier Acknowledged
Batch Order1 for 57965916-GDLOTH7895	4100002361		Blanket/Service	Tivi Horvath	10/19/2022	28630.00 USD	Supplier Acknowledged

Create a service confirmation

B: Click on **More** menu on top right section of the screen

C: Click on **Create Service Confirmation**

The screenshot displays the ASCEND UAT Purchasing interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The main header shows 'ORDER: Batch Order1 For 005..' with a 'Supplier Acknowledged' status, a value of '15,500.00 USD', and buttons for 'Comments and Attachments' and 'More'. The 'More' menu is highlighted with a red box and labeled 'B'. Below the main header, the 'BASIC DETAILS' section is visible, containing a table with the following data:

Order Number	Order Name	Order Contact	Order Author	Purchase Type	Creation Date
4100002386	Batch Order1 for 0057965916...	Tivi Horvath	Tivi Horvath	Blanket/Service	10/24/2022

Below the table, there are fields for 'Original Issue Date', 'Supplier Acknowledged Date', and 'Currency'. A search bar and navigation icons are also present. The 'Create Service Confirmation' option is highlighted with a red box and labeled 'C' in the bottom right section of the interface.

Create a service confirmation (Basic Details Section)

A: Fill in the mandatory information within the **BASIC DETAILS** section such as the **SERVICE CONFIRMATION NAME** and the **SUPPLIER SERVICE CONFIRMATION NUMBER (Supplier Invoice Number)**

B: The **FIELD SUPERVISOR FIELD** is defaulted from the order

C: If you need the invoice to be auto created then check mark the **ERS** box.

D: Once the basic details are filled then click on **Next**

Note: ERS or Evaluated Receipt Settlement is an automated invoice and payment system. Once an ERS service confirmation is approved, invoice will automatically be created in GEP SMART.

← SC-03:22-00120 Draft 0.00 USD Comments More

Go To Line Details

Service Confirmation Number: SC-03:22-00120

Service Confirmation Name *: ServiceConfirmation1 for Order

Supplier Service Confirmation Number *: Test 123

Description

Order Number: PO-03:22-000700

Order Name: Order1 for Do NOT USE - Test PO...

Currency: USD

Supplier Code: PC-2022.000174

Supplier Name: SupplierKK

Field Supervisor *: KK Admin (Kunal.Kadam@gep)

Work Location

Created By: Kunal Kadam

Created On *: 03/31/2022

Purchase Type: Services T&M

Enter Tax At Line

Tax (USD): 0.00

ERS (Auto-create invoice)

External Id

Local Reference Number

Print Preview Save Next Submit

Create a service confirmation (Notes & Attachment Section)

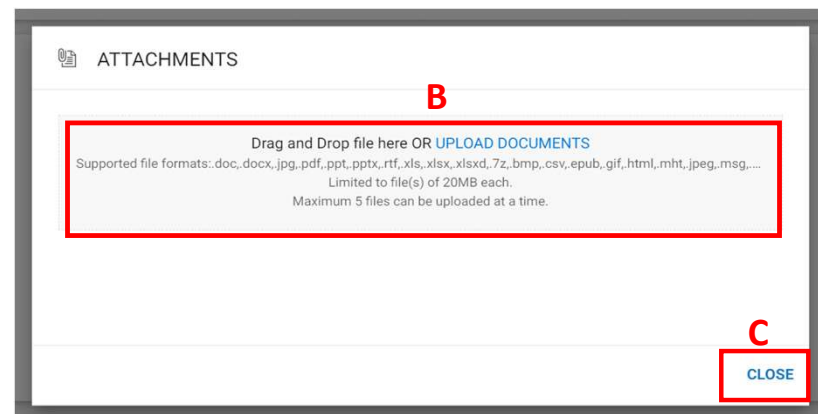
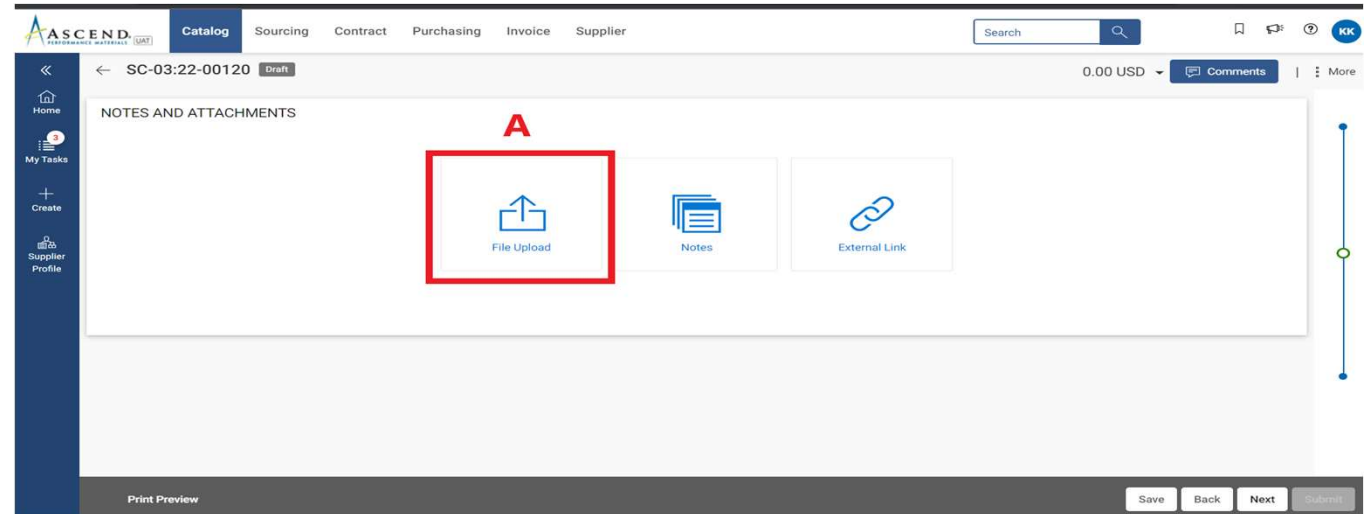
Attach supporting documentation to the Service Confirmation*

A: Click on **FILE UPLOAD**

B: Once the pop-up box is displayed, You can either drag file(s) or click **UPLOAD DOCUMENTS** to attach document(s)

C: Once uploaded, click **CLOSE**. The uploaded files will be displayed

D: Once the file has been successfully uploaded, click the **NEXT** button at the bottom right of the screen



Create a service confirmation (Line Details Section)

A: Fill in the mandatory information within the **LINE DETAILS** section such as **PRICE & START DATE** .

B: You must also enter the **COMPLETION DATE**.

C: Add Tax Rate or Tax Amount if applicable

D: Click on **ADD SUBLINE** option to fill the subline category details

The image displays two screenshots of the ASCEND purchasing interface, specifically the 'Line Details' section for a purchase order (SC-11:22-00722). The interface shows a table of line items with various fields for configuration and pricing.

Line 1: Universal 18 x 42.7 channel Equipment

Line Type: Amount Based Service

UOM: PERF. UNIT

Quantity: 1.00

Effective Unit Price (USD): 1,000.00

Price (USD): 1,000.00

Price Per: 1

Line Value (USD): 0.00

Tax rate (%): 0.00

Tax (USD): 0.00

Line Total (USD): 0.00

Consumed Date: --

Start Date: MM/DD/YYYY

Completion Date: --

Category: IS:EqptMtcDemolition:100200102

Contract Number: None

Contracted Subline Value (USD): 0.00

Non Contracted Subline Value (USD): 0.00

Reference Invoice Number: --

Reference Invoice Status: --

The screenshots illustrate the steps for creating a service confirmation:

- A:** Highlighting the **Price (USD)** and **Start Date** fields.
- B:** Highlighting the **Completion Date** field.
- C:** Highlighting the **Tax Rate** and **Tax Amount** fields.
- D:** Highlighting the **Add Sublines** button.

Create a service confirmation (Line Details Section- Adding Sublines: Optional)

A: Add Line-Item information in **Add Blank Sublines** section.

B: Line-items added in Add Blank Sublines section will appear in Selected Sublines section

Select all the mandatory fields on the subline like **DESCRIPTION, SUBLINE TYPE, UOM, QUANTITY, PRICE, DATES & CATEGORY**

C: Click **Add**

ADD SUBLINES

Selected Subline(s)	Supplier Personnel Name	Description	Supplier Item Number	Item Number	Short Name	Subline Type
Add Blank Subline(s)	--	--	--	--	--	Select
	--	--	--	--	--	Select
	--	--	--	--	--	Select
	--	--	--	--	--	Select
	--	--	--	--	--	Select

ADD SUBLINES

Selected Subline(s)	Supplier Personnel Name	Description	Supplier Item Number	Item Number	Short Name	Subline Type	UOM
2	--	Universal 18 x 42.7 channel ...	--	--	--	Material	Perf. unit
Add Blank Subline(s)	--	Universal 18 x 42.7 channel ...	--	--	--	Material	Perf. unit

Cancel **Add**

Create a service confirmation (Line Details Section)

Once the sublines are added, these will be available below the line details section.

Note: If Sublines are added by the suppliers, header details will no longer be editable. Information will be editing on subline level

Line Details Go To Basic Details

1. Universal 18 x 42.7 channel Equipment

Line Type	UOM	Quantity	Effective Unit Price (USD)	Price (USD)	Price Per
Amount Based Service	PERF. UNIT	1.00	50.00	50.00	1
Line Value (USD)	Tax rate (%)	Tax (USD)	Line Total (USD)	Consumed Date	Start Date
50.00	0.00	5.00	55.00	--	--
Completion Date	Category	Contract Number	Contracted Subline Value (USD)	Non Contracted Subline Value (U...)	Reference Invoice Number
--	IS:EqptMtcDemolition:10020...	None	0.00	50.00	

Reference Invoice Status

■ Price Compliant, Catalog Line
 ■ Price Non-Compliant, Catalog Line
 ■ Flex Price Yes, Catalog Line
 ■ Non-Catalog Line

Add Sublines

Subline Number	Supplier Personnel Name	Subline Type	UOM	Quantity	Effective Unit Price (USD)	Price (US
<input type="checkbox"/>	1.1	Test	Material	Each	1.00	10.00
<input type="checkbox"/>	1.2	Test2	Rate Based Service	Each	2.00	20.00

Rows Per Page: 12 / 1

Print Preview Save Back Go to Basic Details Submit

Create a service confirmation (Line Details Section: Partial Service Confirmation Creation)

If Service Order is created with multiple line items, suppliers have the option to delete the line items they are not billing

Click on **Trash Icon** to delete the additional line details

Line Details

1. Universal 18 x 42.7 channel Equipment

Line Type Amount Based Service	UOM PERF. UNIT	Quantity 1.00	Effective Unit Price (USD) 50.00	Price (USD) 50.00	Price Per 1
Line Value (USD) 50.00	Tax rate (%) 0.00	Tax (USD) 5.00	Line Total (USD) 55.00	Consumed Date -	Start Date -
Completion Date -	Category IS:EqptMtcDemolition:100200102	Contract Number None	Contracted Subline Value (USD) 0.00	Non Contracted Subline Value (USD) 50.00	Reference Invoice Number

Reference Invoice Status

Price Compliant, Catalog Line Price Non-Compliant, Catalog Line Flex Price Yes, Catalog Line Non-Catalog Line

Subline Number	Supplier Personnel Name	Subline Type	UOM	Quantity	Effective Unit Price (USD)	Price (USD)	Price Per	Flexible Price Flag	
<input type="checkbox"/>	1.1	Test	Material	Each	1.00	10.00	10.00	1	Not Applicable
<input type="checkbox"/>	1.2	Test2	Rate Based Service	Each	2.00	20.00	20.00	1	Not Applicable

Rows Per Page: 12 / 1

2. Universal 18 x 42.7 channel Materials

Line Type Amount Based Service	UOM PERF. UNIT	Quantity 1.00	Effective Unit Price (USD) 0.00	Price (USD) 0.00	Price Per 1
Line Value (USD) 0.00	Tax rate (%) 0.00	Tax (USD) 0.00	Line Total (USD) 0.00	Consumed Date -	Start Date MM/DD/YYYY

Trash icon highlighted in red box.

Create a service confirmation (Submitting Service Confirmation)

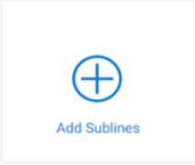
Once all the information is correctly added, click on **Submit** button to proceed

← SC-11:22-00722 **Draft** 110.00 USD **Comments** | More

Line Details Go To Basic Details

1. Universal 18 x 42.7 channel Equipment

Line Type Amount Based Service	UOM PERF. UNIT	Quantity 1.00	Effective Unit Price (USD) 100.00	Price (USD) 100.00	Price Per 1
Line Value (USD) 100.00	Tax rate (%) 10.00	Tax (USD) 10.00	Line Total (USD) 110.00	Consumed Date --	Start Date * 10/19/2022
Completion Date * 10/23/2022	Category IS:EqptMtcDemolition:10020...	Contract Number None	Contracted Subline Value (USD) 0.00	Non Contracted Subline Value (U... 0.00	Reference Invoice Number --
Reference Invoice Status --					



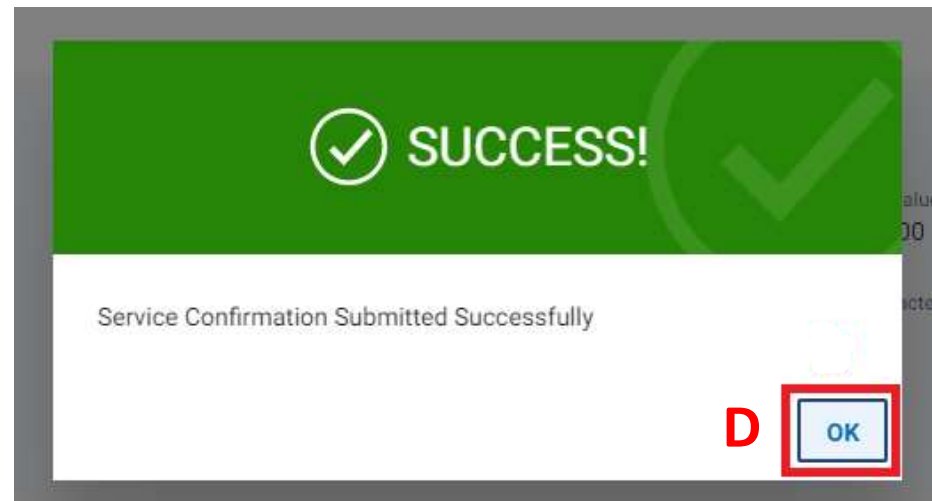
Add Sublines

Print Preview Save Back Go to Basic Details Submit

Create a service confirmation

D: Once submitted, you will see the success message, click **OK**

*You will be directed to the **SERVICE CONFIRMATION** screen, where you will see the submitted Service Confirmation in **APPROVAL PENDING** status*



Create a service confirmation directly through Landing Page

A: Click on the **Create** icon on the left-hand side of your home screens

B: Click on **SERVICE CONFIRMATION**

C: Click **USING ORDER**

The screenshot shows the ASCEND UAT interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. A search bar is located on the right. The left-hand navigation menu is visible, with the 'Create' icon highlighted in red and labeled 'A'. A dropdown menu is open, showing 'Service Confirmation' (labeled 'B') and 'Using Order' (labeled 'C'). The main content area displays a table with columns for 'Document Number', 'Days in Current S...', and 'Order Total'. The table contains two rows of data:

	Document Number	Days in Current S...	Order Total
SE - Test PO 2 - Supplier KK	PO-03:22-000695		200.00
- Supplier KK	PO-03:22-000694		100.00

At the bottom right, there is a 'Rows Per Page' dropdown set to '10' and a pagination indicator '1 - 2 Of 2'.

Create a service confirmation

D: Click on **USE ORDER** for the service order for which you need to create a service confirmation

Here onwards the procedure to create the Service confirmation remains the same as showcased in previous slides.

The screenshot shows the ASCEND UAT web application interface. The top navigation bar includes links for Catalog, Sourcing, Contract, Purchasing, Invoice, and Supplier. A search bar is located on the right. The main content area is titled 'MANAGE - ORDER' and displays the following information:

- Order1 for Do NOT USE - Test PO 3 -SupplierKK
- SUPPLIER ACKNOWLEDGED
- Order Number : PO-03.22-000700 | Order Total : 300.00 USD | Order Contact : KK Admin | Author : KK Admin | Creation Date : 3/31/2022, 6:16:52 PM

A red box highlights the 'USE ORDER' button in the top right corner of the order details section.

Create a service confirmation (Basic Details Section)

A: Fill in the mandatory information within the **BASIC DETAILS** section such as the **SERVICE CONFIRMATION NAME** and the **SUPPLIER SERVICE CONFIRMATION NUMBER (Supplier Invoice Number)**

B: The **FIELD SUPERVISOR FIELD** is defaulted from the order

C: If you need the invoice to be auto created then check mark the **ERS** box.

D: Once the basic details are filled then click on **Next**

Note: ERS or Evaluated Receipt Settlement is an automated invoice and payment system. Once an ERS service confirmation is approved, invoice will automatically be created in GEP SMART.

← SC-03:22-00120 **Draft** 0.00 USD **Comments** | More

Go To Line Details

Service Confirmation Number: SC-03:22-00120

Service Confirmation Name *: ServiceConfirmation1 for Order

Supplier Service Confirmation Number *: Test 123

Description

Order Number: PO-03:22-000700

Order Name: Order1 for Do NOT USE - Test PO...

Currency: USD

Supplier Code: PC-2022.000174

Supplier Name: SupplierKK

Field Supervisor *: KK Admin (Kunal.Kadam@gef)

Work Location

Created By: Kunal Kadam

Created On *: 03/31/2022

Purchase Type: Services T&M

Enter Tax At Line

Tax (USD): 0.00

ERS (Auto-create invoice)

External Id

Local Reference Number

Print Preview **Save** **Next** **Submit**

Create a service confirmation (Notes & Attachment Section)

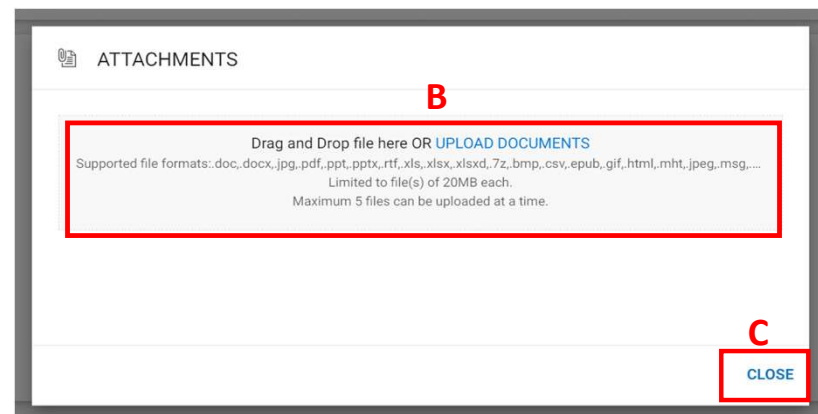
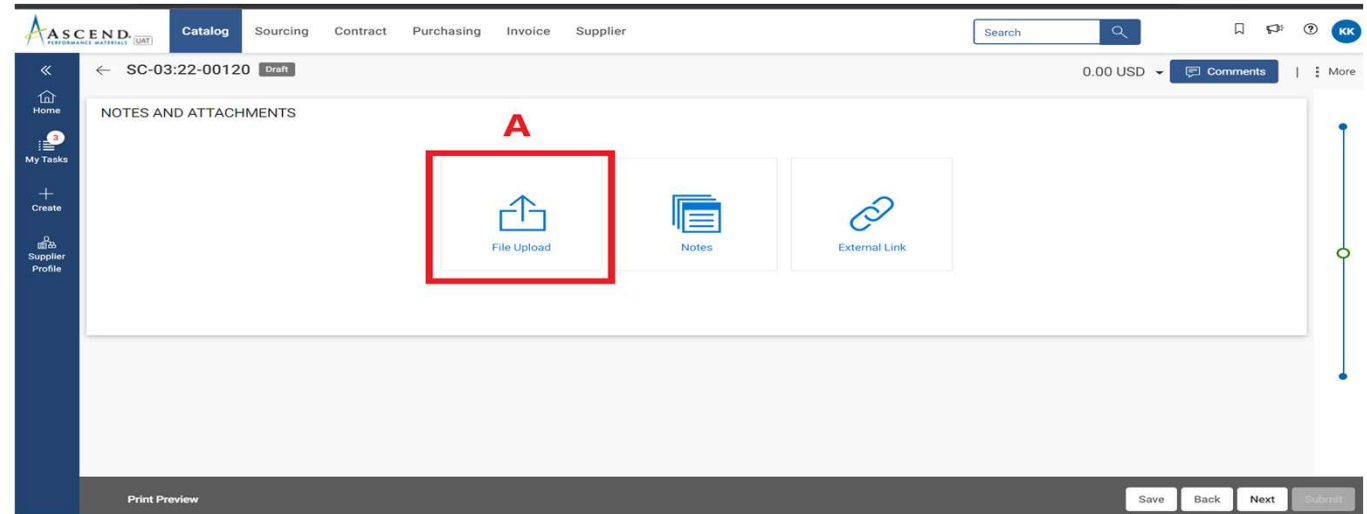
Attach supporting documentation to the Service Confirmation*

A: Click on **FILE UPLOAD**

B: Once the pop-up box is displayed, You can either drag file(s) or click **UPLOAD DOCUMENTS** to attach document(s)

C: Once uploaded, click **CLOSE**. The uploaded files will be displayed

D: Once the file has been successfully uploaded, click the **NEXT** button at the bottom right of the screen



Create a service confirmation (Line Details Section)

A: Fill in the mandatory information within the **LINE DETAILS** section such as **PRICE & START DATE** .

B: You must also enter the **COMPLETION DATE**.

C: Add Tax Rate or Tax Amount if applicable

D: Click on **ADD SUBLINE** option to fill the subline category details

The image displays two screenshots of the ASCEND purchasing system interface, specifically the 'Line Details' section for a contract (SC-11:22-00722). The interface shows a table of line items with various fields for pricing, dates, and tax information.

Top Screenshot: Shows the 'Line Details' form for '1: Universal 18 x 42.7 channel Equipment'. The 'Price (USD)' field is highlighted in pink, and the 'Start Date' field is also highlighted in pink. The 'Completion Date' field is highlighted in pink. The 'Add' button is highlighted in pink.

Bottom Screenshot: Shows the same 'Line Details' form. The 'Add Sublines' button is highlighted with a red box. The 'Add' button next to the 'Line Value' field is highlighted with a red box. The 'Add' button next to the 'Tax Rate (%)' field is highlighted with a red box. The 'Add' button next to the 'Tax (USD)' field is highlighted with a red box.

Create a service confirmation (Line Details Section- Adding Sublines: Optional)

A: Add Line-Item information in **Add Blank Sublines** section.

B: Line-items added in Add Blank Sublines section will appear in Selected Sublines section

Select all the mandatory fields on the subline like **DESCRIPTION, SUBLINE TYPE, UOM, QUANTITY, PRICE, DATES & CATEGORY**

C: Click **Add**

ADD SUBLINES

Selected Subline(s) Add Blank Subline(s)

Add Blank Subline(s)	A	Supplier Personnel Name	Description	Supplier Item Number	Item Number	Short Name	Subline Type
<input type="checkbox"/>	--	--	--	--	--	--	Select
<input type="checkbox"/>	--	--	--	--	--	--	Select
<input type="checkbox"/>	--	--	--	--	--	--	Select
<input type="checkbox"/>	--	--	--	--	--	--	Select
<input type="checkbox"/>	--	--	--	--	--	--	Select

ADD SUBLINES

Selected Subline(s) 2

Add Blank Subline(s)

	B	Supplier Personnel Name	Description	Supplier Item Number	Item Number	Short Name	Subline Type	UOM
	--		Universal 18 x 42.7 channel ...	--	--	--	Material	Perf. unit
	--		Universal 18 x 42.7 channel ...	--	--	--	Material	Perf. unit

Cancel
Add

Create a service confirmation (Line Details Section)

Once the sublines are added, these will be available below the line details section.

Note: If Sublines are added by the suppliers, header details will no longer be editable. Information will be editing on subline level

Line Details Go To Basic Details

1. Universal 18 x 42.7 channel Equipment

Line Type	UOM	Quantity	Effective Unit Price (USD)	Price (USD)	Price Per
Amount Based Service	PERF. UNIT	1.00	50.00	50.00	1
Line Value (USD)	Tax rate (%)	Tax (USD)	Line Total (USD)	Consumed Date	Start Date
50.00	0.00	5.00	55.00	--	--
Completion Date	Category	Contract Number	Contracted Subline Value (USD)	Non Contracted Subline Value (U...)	Reference Invoice Number
--	IS:EqptMtcDemolition:10020...	None	0.00	50.00	

Reference Invoice Status

■ Price Compliant, Catalog Line
 ■ Price Non-Compliant, Catalog Line
 ■ Flex Price Yes, Catalog Line
 ■ Non-Catalog Line

Add Sublines

Subline Number	Supplier Personnel Name	Subline Type	UOM	Quantity	Effective Unit Price (USD)	Price (US)
<input type="checkbox"/>	1.1	Test	Material	Each	1.00	10.00
<input type="checkbox"/>	1.2	Test2	Rate Based Service	Each	2.00	20.00

Rows Per Page: 12 / 1

Print Preview Save Back Go to Basic Details Submit

Create a service confirmation (Line Details Section: Partial Service Confirmation Creation)

If Service Order is created with multiple line items, suppliers have the option to delete the line items they are not billing

Click on **Trash Icon** to delete the additional line details

Line Details

1. Universal 18 x 42.7 channel Equipment

Line Type Amount Based Service	UOM PERF. UNIT	Quantity 1.00	Effective Unit Price (USD) 50.00	Price (USD) 50.00	Price Per 1
Line Value (USD) 50.00	Tax rate (%) 0.00	Tax (USD) 5.00	Line Total (USD) 55.00	Consumed Date -	Start Date -
Completion Date -	Category IS:EqptMtcDemolition:100200102	Contract Number None	Contracted Subline Value (USD) 0.00	Non Contracted Subline Value (USD) 50.00	Reference Invoice Number

Reference Invoice Status

Price Compliant, Catalog Line Price Non-Compliant, Catalog Line Flex Price Yes, Catalog Line Non-Catalog Line

Subline Number	Supplier Personnel Name	Subline Type	UOM	Quantity	Effective Unit Price (USD)	Price (USD)	Price Per	Flexible Price Flag	
<input type="checkbox"/>	1.1	Test	Material	Each	1.00	10.00	10.00	1	Not Applicable
<input type="checkbox"/>	1.2	Test2	Rate Based Service	Each	2.00	20.00	20.00	1	Not Applicable

Rows Per Page: 12 / 1

2. Universal 18 x 42.7 channel Materials

Line Type Amount Based Service	UOM PERF. UNIT	Quantity 1.00	Effective Unit Price (USD) 0.00	Price (USD) 0.00	Price Per 1
Line Value (USD) 0.00	Tax rate (%) 0.00	Tax (USD) 0.00	Line Total (USD) 0.00	Consumed Date -	Start Date MM/DD/YYYY

Trash icon highlighted in red box.

Create a service confirmation (Submitting Service Confirmation)

Once all the information is correctly added, click on **Submit** button to proceed

← SC-11:22-00722 **Draft** 110.00 USD **Comments** | More

Line Details

1. Universal 18 x 42.7 channel Equipment

Line Type	UOM	Quantity	Effective Unit Price (USD)	Price (USD)	Price Per
Amount Based Service	PERF. UNIT	1.00	100.00	100.00	1
Line Value (USD)	Tax rate (%)	Tax (USD)	Line Total (USD)	Consumed Date	Start Date *
100.00	10.00	10.00	110.00	--	10/19/2022
Completion Date *	Category	Contract Number	Contracted Subline Value (USD)	Non Contracted Subline Value (U...	Reference Invoice Number
10/23/2022	IS:EqptMtcDemolition:10020...	None	0.00	0.00	--
Reference Invoice Status					
--					

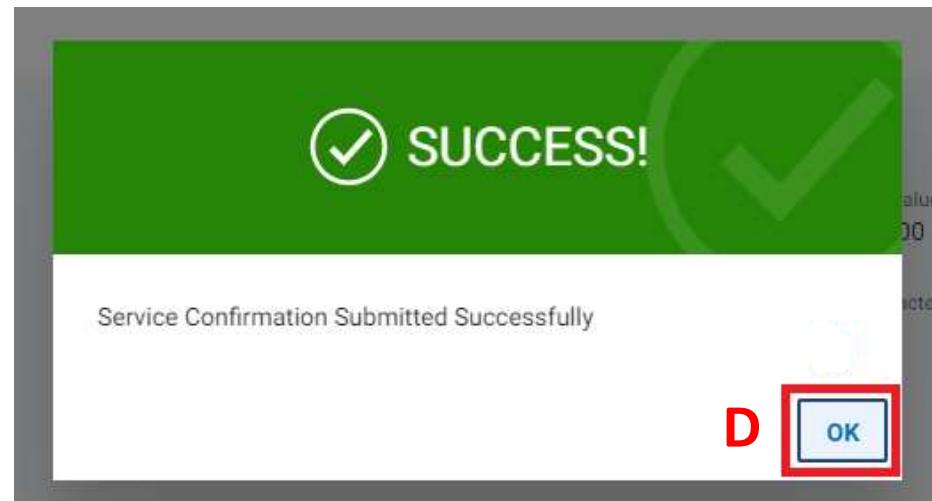
+ Add Sublines

Print Preview **Save** **Back** **Go to Basic Details** **Submit**

Create a service confirmation

D: Once submitted, you will see the success message, click **OK**

You will be directed to the **SERVICE CONFIRMATION** screen, where you will see the submitted Service Confirmation in **APPROVAL PENDING** status



Service confirmation statuses

- **Draft:** Service confirmation is created; however, it is not submitted to Ascend (work-in-progress)
- **Approved:** Service confirmation is approved by Ascend.
- **Withdrawn:** Service confirmation has been withdrawn by supplier to make changes.
- **Approval Pending:** Sent to Ascend; however, it is not yet approved
- **Rejected:** Ascend rejected the service confirmation. You need to correct errors and resubmit.

Update & Resubmit Rejected Service Confirmation

Update and resubmit rejected service confirmation

To review the comments sent on a rejected service confirmation, open the rejected service confirmation

A: Click on the **COMMENT** icon in the top right-hand corner

← SC-07:22-00483 Rejected 2.00 USD Comments |

[View changed version](#)

∨ BASIC DETAILS [Go To Line Details](#) ⌵

Service Confirmation Number SC-07:22-00483	Service Confirmation Name ServiceConfirmation6 for Order1 ...	Supplier Service Confirmation Number SCApprovalExcess	Order Number 4100001890	Order Name Order1 for FieldSupApproval	Currency USD
Supplier Code 202425	Supplier Name HERC RENTALS INC FKA HERTZ ...	Field Supervisor * Req QTest (carlos.diaz@gep.com)	Created By HERC APM	Created On * 07/20/2022	Submitted By HERC APM
Submitted On * 07/20/2022	Purchase Type Blanket/Service	Enter Tax At Line	Tax (USD) 0.00	<input type="checkbox"/> ERS (Auto-create invoice) ⓘ	

Update and resubmit rejected service confirmation

The approver's comments explaining the reason for the rejection will be displayed

You can create a new Service Confirmation and make the changes asked by the approver and re-send the service confirmation for approval

The screenshot shows a 'COMMENT' form with the following elements:

- Header:** A 'COMMENT' button with a speech bubble icon.
- Service Confirmation:** A light blue header box containing 'Service Confirmation' and 'SC-0722-00483'.
- Comment:** A white box containing the text 'Internal Users and Suppliers - Req QTest' and 'Please correct Line 1 in SC', with a timestamp '11/9/2022 10:56:39 PM' on the right.
- Input:** A text area with the placeholder 'Type your comment here'.
- Attachments:** A section with the label 'Attachments' and a document icon.
- Share With:** A dropdown menu labeled 'Share With' with 'Internal Users an...' selected.
- Buttons:** 'CANCEL' and 'Post' buttons at the bottom right.

Update and resubmit rejected service confirmation

A: To resubmit the SC, click on the **VIEW CHANGED VERSION** on top right section of screen.

The SC document will open in **DRAFT** status.

B: Update the details that are mentioned in comment box by Buyer on the New service confirmation.

C: Once updated, Click on **SUBMIT** button on bottom right of the screen.

SC-07:22-00483 **Rejected** 2.00 USD [Comments](#) [View changed version](#) **A**

BASIC DETAILS [Go To Line Details](#)

Service Confirmation Number SC-07:22-00483	Service Confirmation Name ServiceConfirmation6 for Order1 ...	Supplier Service Confirmation Number SCApprovalExcess	Order Number 4100001890	Order Name Order1 for FieldSupApproval	Currency USD
Supplier Code 202425	Supplier Name HERC RENTALS INC FKA HERTZ ...	Field Supervisor* Req QTest (carlos.diaz@gep.com)	Created By HERC APM	Created On* 07/20/2022	Submitted By HERC APM
Submitted On* 07/20/2022	Purchase Type Blanket/Service	Enter Tax At Line	Tax (USD) 0.00	<input type="checkbox"/> ERS (Auto-create invoice) ⓘ	

SC-07:22-00483 **Draft** 2.00 USD [Comments](#) [More](#) [View Original version](#)

Line Details [Go To Basic Details](#)

1. Pump

Line Type Amount Based Service	UOM EACH ⓘ	Quantity 1	Effective Unit Price (USD) 2.00	Price (USD) 2.00 B	Price Per 1
Line Value (USD) 2.00 ⓘ	Tax rate (%) 0.00	Tax (USD) 0.00	Line Total (USD) 2.00	Consumed Date -- ⓘ	Start Date 07/20/2022 ⓘ
Completion Date 07/20/2022 ⓘ	Category CNL:ConsultBusiness:...	Contract Number --	Contracted Subline Value... 0.00 ⓘ	Non Contracted Subline ... 0.00	Reference Invoice Number --
Line Value (USD) 2.00 ⓘ	Tax rate (%) 0.00	Tax (USD) 0.00	Line Total (USD) 2.00	Consumed Date -- ⓘ	Start Date 07/20/2022 ⓘ
Completion Date 07/20/2022 ⓘ	Category CNL:ConsultBusiness:...	Contract Number --	Contracted Subline Value... 0.00 ⓘ	Non Contracted Subline ... 0.00 ⓘ	Reference Invoice Number --
Reference Invoice Status --	Comments				

Print Preview [Save](#) [Back](#) [Go to Basic Details](#) [Submit](#) **C**

Update and resubmit rejected service confirmation

A: Enter the **Service Confirmation Name** and **Supplier Service Confirmation Number** number generated in your system in basic details section.

B: Click on **File upload** icon and upload the soft copy of service confirmation document.

← SC-07:22-00483 Draft 2.00 USD Comments More

View Original version

Go To Line Details

A

Service Confirmation Name *
ServiceConfirmation6 for Order1 for F

Supplier Service Confirmation Number *
SCApprovalExcess

Order Number
4100001890

Order Name
Order1 for FieldSupApproval

Currency
USD

Supplier Code
202425

Supplier Name
HERC RENTALS INC FKA HERTZ EQUIP...

Field Supervisor *
Req QTest (carlos.diaz@gep.co)

Created By
HERC APM

Created On *
11/09/2022

Purchase Type
Blanket/Service

Enter Tax At Line

Tax (USD)
0.00

ERS (Auto-create invoice)

Print Preview Save Next Submit

NOTES AND ATTACHMENTS

B

File Upload

Notes

External Link


Print Preview Save Back Next Submit

Update and resubmit rejected service confirmation

C: Once the upload is complete, Click on Close Button.

D: Click on Next button to proceed for next step.

E: Verify the line details and click on **Submit**.

 ATTACHMENTS

Drag and Drop file here OR [UPLOAD DOCUMENTS](#)

Supported file formats: .doc, .docx, .jpg, .pdf, .ppt, .pptx, .rtf, .xls, .xlsx, .xlsd, .7z, .bmp, .csv, .epub, .gif, .html, .mht, .jpeg, .msg, ...

Limited to file(s) of 20MB each.

Maximum 5 files can be uploaded at a time.

C
CLOSE

D

SAVE
NEXT
SUBMIT

← SC-07:22-00483 Draft
2.00 USD ▼ Comments | More

[View Original version](#)

Line Details [Go To Basic Details](#)

1. Pump

Line Type Amount Based Service	UOM EACH	Quantity 1	Effective Unit Price (USD) 2.00	Price (USD) 2.00	Price Per 1
Line Value (USD) 2.00	Tax rate (%) 0.00	Tax (USD) 0.00	Line Total (USD) 2.00	Consumed Date --	Start Date 07/20/2022
Completion Date 07/20/2022	Category CNL.ConsultBusiness:...	Contract Number --	Contracted Subline Value... 0.00	Non Contracted Subline ... 0.00	Reference Invoice Number --
Reference Invoice Status --					

Print Preview

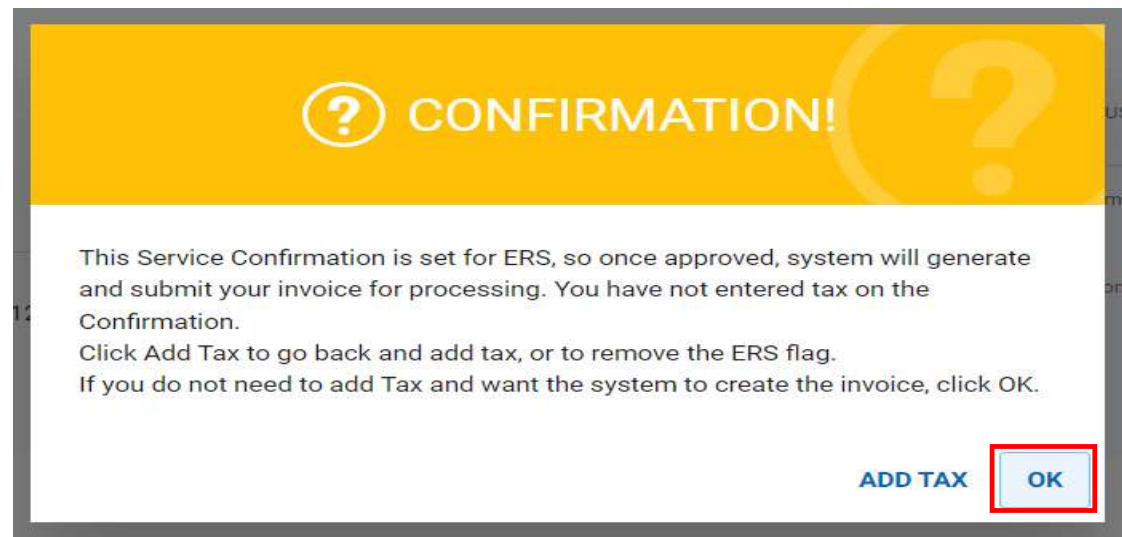
Save
Back
Go to Basic Details
Submit

ADD TAX
OK

Update and resubmit rejected service confirmation

F: Provide the Confirmation by Clicking on the **OK** button.

The Revised Service confirmation is now sent to buyer



Create Service Invoice

Creating an Invoice from Approved Service Confirmation Document

- Once a Service Confirmation (without ERS flag checked) is approved by Ascend, the Primary Contact will receive a notification email as the status is APPROVED
- The Supplier user needs to login to the portal to create an invoice manually with reference to the approved Service Confirmation

Note: It's recommended to always create Service Confirmation with ERS flagged, this reduces the manual effort to flip an approved SC into an Invoice

Creating an Invoice from Approved Service Confirmation Document

Service Confirmation is created in Approved status

This SC document was created ERS flag unchecked and hence the Invoice status is **Invoice Not Created**

Hence suppliers need to create an Invoice using this approved SC document

← SC-11:22-00721 Approved 300.00 USD Comments More

▼ BASIC DETAILS Go To Line Details

Service Confirmation Number SC-11:22-00721	Service Confirmation Name ServiceConfirmation1 for Batch Order1 fo...	Supplier Service Confirmation Number 13245	Order Number 4100002386
Order Name Batch Order1 for 0057965916-80-GDLOT...	Currency USD	Supplier Code 203532	Supplier Name UNIVERSAL FABRICATORS INC
Field Supervisor * Tivi Horvath (tvhorv@ascendmaterials.co...	Created By Kunal Kadam	Created On * 11/23/2022	Submitted By Kunal Kadam
Submitted On * 11/23/2022	Purchase Type Blanket/Service	Enter Tax At Line	Tax (USD) 0.00
Invoice Creation Status Invoice Not Created	A <input type="checkbox"/> ERS (Auto-create invoice)	Invoice Submission Status Invoice Not Submitted	Interface Status --

Print Preview Copy

Creating an Invoice from Approved Service Confirmation Document

To Create Invoice against Non-ERS SC document,

A: Click on **Purchasing** Section

B: Go to **ORDER**

C: Select the Order against which Service Confirmation was submitted

The screenshot shows the ASCEND UAT Purchasing interface. The 'Purchasing' tab is highlighted in red (A). The 'Documents' section is active, with 'ORDER' selected in a red box (B). Below this, a summary card shows 'All 1' and 'Supplier Acknowledged 1'. A table below lists orders, with the first row highlighted in red (C):

Order Name	Order Number	Supplier	Purchase Type	Created By
Batch Order1 for 0057965916-80-GDLOTH7895	4100002386	UNIVERSAL FABRICATORS ...	Blanket/Service	Tivi Horvath

At the bottom, it shows 'Rows Per Page: 10' and '1 - 1 Of 1'.

Creating an Invoice from Approved Service Confirmation Document

A: Click on **CREATE INVOICE** button on bottom right-hand corner and then select **By Selecting Service Confirmation(s)**

B: A pop-up box appears, select the **Supplier SC**

C: Click on **Select** to proceed

ORDER: Batch Order1 For 005.. Supplier Acknowledged 15,500.00 USD Comments and Attachments More

- > BASIC DETAILS
- > SUPPLIER DETAILS
- > INCO TERMS
- > INVOICING AND DELIVERY DETAILS
- > RECEIVING TOLERANCES (DEFAULTS)
- > NOTES & ATTACHMENTS

* Indicates mandatory fields

Print Preview By Selecting Service Confirmation(s) **CREATE INVOICE**

Select Service Confirmation

Supplier Service Confiratio...	Field Supervisor	Submitted by	Service Confiratio
<input type="radio"/> 13245	Tivi Horvath (tvhorv@ascendmaterials.com)	Kunal Kadam	300.00

Reset

Creating an Invoice from Approved Service Confirmation Document

Invoice in Draft status will be created

A: In Basic Details section, fill in below Information

- 1) Invoice Amount
(Invoice value+ Taxes)
- 2) Supplier Invoice Number
- 3) Supplier Invoice Date

B: Click on More option and select Upload Image option to add supporting documents

← INV-11:22-000630 - Invoice1 For Batch Order1... Draft 300.00 USD Comments and Attachments More

Basic Details Manage Optional Fields

* Indicates mandatory fields

Invoice Name* Invoice1 for Batch Order1 for 00...	Invoice Number INV-11:22-000630	Invoice Amount* 0.00	Supplier Invoice Number* 13245
Invoice Creation Date 11/23/2022	Scheduled Payment Date 02/21/2023	Supplier Invoice Date* 11/23/2022	Supplier Name UNIVERSAL FABRICATORS INC
<input type="checkbox"/> Non PO Invoice	Order Number 4100002386	Order Name Batch Order1 for 0057965916-80...	Supplier Code 203532
Currency USD	Purchase Type Blanket/Service	Delivery Note	Invoice Type Standard
<input type="checkbox"/> GR-IV			

More

- Upload Image
- Export To PDF
- Delete
- Print Invoice

Creating an Invoice from Approved Service Confirmation Document

Under **LINE DETAILS** section for an approved SC documents, suppliers can only update Taxes by adding it under **Taxes** field (If Applicable)

Once Taxes are added, click on **Sent To Buyer**

INV-11:22-000630 - Invoice1 For Batch Order1... 300.00 USD

Draft

<> PAYMENT AND DELIVERY DETAILS

> LINE DETAILS Indicates mandatory fields

LINES

Search Delete Manage Columns More

<input type="checkbox"/>	L...	Type	Line Descript...	Line Total	Taxes	Applicable Tax ...
<input type="checkbox"/>	1	Material	Universal 18 x 42...	100.00	0.00	Invoice Tax
<input type="checkbox"/>	2	Material	Universal 18 x 42...	200.00	0.00	Invoice Tax

Rows Per Page: 10

Page 1 of 1

Print Preview

SAVE Send To Buyer

Create Material Invoice

Create Material Invoice

A. Click **PURCHASING** tab

B. Click on the order in **SUPPLIER ACKNOWLEDGED** status.

Invoice can be created via 2 methods :

- 1) By Selecting Receipts
- 2) By Flipping order to invoice

*If the order is in **SENT TO SUPPLIER** status, you will first need to acknowledge the order before creating the invoice*

The screenshot shows the ASCEND Performance Materials UAT interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The 'Purchasing' tab is highlighted with a red box and labeled 'A'. Below the navigation bar, there is a search bar and a 'Documents' section. The 'Documents' section has tabs for 'ORDER', 'RETURN NOTE', 'SERVICE CONFIRMATION', and 'ASN'. Under the 'ORDER' tab, there are two filters: 'All' (with a count of 1) and 'Sent To Supplier' (with a count of 1). Below the filters is a table with columns: Order Name, Order Number, Supplier, Purchase Type, Created By, Created On, Order Value, and Status. The table contains two rows. The second row, 'Order1 for Test PO 1 - Supplier KK', is highlighted with a red box and labeled 'B'. Its status is 'Supplier Acknowledged', which is also highlighted with a red box. The first row is 'Order1 for DO NOT USE - Test PO 2 - Suppl...' with status 'Sent To Supplier'. At the bottom of the table, there is a 'Rows Per Page' dropdown set to 10 and a page indicator '1 - 1 Of 1'.

Order Name	Order Number	Supplier	Purchase Type	Created By	Created On	Order Value	Status
Order1 for DO NOT USE - Test PO 2 - Suppl...	PO-03:22-000695	SupplierKK	Material	KK Admin	03/30/2022	200.00 USD	Sent To Supplier
Order1 for Test PO 1 - Supplier KK	PO-03:22-000694	SupplierKK	Material	KK Admin	03/30/2022	100.00 USD	Supplier Acknowledged

Create Invoice by Flipping Order to Invoice (Option 1: Preferred)

C. Click **CREATE INVOICE**

D Click **By Flipping Order to Invoice**, to create invoice against the order.

You will get a **SUCCESS** dialogue box stating "The Invoice is created"

ASCEND UAT Catalog Sourcing Contract Purchasing Invoice Supplier

ORDER: Order1 For TE... Supplier Acknowledged 100.00 USD Comments and Attachments More

BASIC DETAILS Manage Optional Fields

Indicates mandatory fields

Order Number PO-0422-000865	Order Name Order1 for TEST PO 9 - Supplie...	Order Contact KK Admin	Order Author KK Admin
Purchase Type Material	Creation Date 04/25/2022	Original Issue Date 04/25/2022	Supplier Acknowledged Date 04/25/2022
Currency USD			

SUPPLIER DETAILS

By Selecting Receipt(s)

By Flipping Order to Invoice

CREATE INVOICE

Print Preview

✓ SUCCESS!

The Invoice is created.

OK

Create Invoice by Selecting Receipt (Option 2)

C. Click **CREATE INVOICE**

D Click **By Selecting Receipt**,
to create invoice against the
raised receipt.

You will get a **SUCCESS** dialogue box
stating "The Invoice is created"

ASCEND
PERFORMANCE MATERIALS | UAT

Catalog Sourcing Contract **Purchasing** Invoice More ▾

Search 🔍

KK

← ORDER: Order1 For TE... Supplier Acknowledged 100.00 USD ▾ Comments and Attachments | More

Basic Details >≡

Supplier Details

Inco Terms

Invoicing And Delivery...

Receiving Tolerances ...

Additional Details

Notes & Attachments

Line Details

Print Preview

Basic Details

* Indicates mandatory fields

Order Number PO-04:22-000863	Order Name Order1 for TEST PO 8	Order Contact KK Admin	Order Author KK Admin
Purchase Type Material	Creation Date 04/25/2022	Original Issue Date 04/25/2022	Supplier Acknowledged Date 04/25/2022
Currency USD			

SUPPLIER DETAILS

By Selecting Receipt(s) **D**

By Flipping Order to Invoice

CREATE INVOICE **C**

✓ SUCCESS!

The Invoice is created.

OK **D**

Create Invoice by Selecting Receipt

F. Select the Receipt raised from left hand side and select the Line Number by clicking the check box.

G. Click on **Create Invoice**.

You will get a **SUCCESS** dialogue box stating "The Invoice is created"

SELECT RECEIPT LINES FOR INVOICE CREATION SHOW SELECTED RECEIPTS

Search Receipt

Select All Receipts

REC-2022.000113-Rece...(-...

Receipt1 for Order1 for TEST PO 9 - Supplier KK

PO Line Number	Buyer Item Number	LineDescription	Supplier Item Num...	Ordered Quantity
1		TEST PO 9		1

Rows Per Page: 10 | 1 - 1 Of 1

Total Order Lines Selected Against Receipt(s): 1 Reset Cancel Create Invoice

Invoice creation set up page

A. Enter **INVOICE TOTAL AMOUNT**

B. Enter the unique **INVOICE NUMBER** generated from your invoice system

C. You can also change the **SUPPLIER INVOICE DATE**

Note: If you create an invoice by Flipping an order, it will directly take you to invoice screen in draft status.

The screenshot displays the 'BASIC DETAILS' section of an invoice creation form. The form is titled 'INV-03:22-000208 - In...' and is in 'Draft' status. The currency is set to '100.00 USD'. The form includes a sidebar with navigation options: Home, My Tasks, Create, and Supplier Profile. The main content area is divided into sections: BASIC DETAILS and SUPPLIER DETAILS. The BASIC DETAILS section contains the following fields:

- Invoice Name*: Invoice1 for Order1 for Test PO...
- Invoice Number: INV-03:22-000208 (labeled C)
- Invoice Amount*: 100.00 (labeled A)
- Supplier Invoice Number*: 1234Test (labeled B)
- Invoice Creation Date: 03/30/2022
- Supplier Invoice Date*: 03/30/2022 (labeled C)
- Supplier Name: SupplierKK
- Supplier Code: PC-2022.000174
- Order Number*: PO-03:22-000694
- Order Name: Order1 for Test PO 1 - Supplier ...
- Multi PO Invoice:
- Purchase Type: Material
- Invoice Type: Standard
- GR-IV:
- Non PO Invoice:

At the bottom of the form, there are buttons for 'Print Preview', 'SAVE', and 'Send To Buyer'.


Invoice creation set up page

A. Scroll down to the **LINE DETAILS** tab and can select/de-select a line item by clicking on the **CHECK MARK**

B. Select the line item, and make the changes on **UNIT PRICE** or **QUANTITY**

LINE DETAILS

LINES

Line(3)    

A	Line	↑↓	Type	↑↓	Item Number	↑↓	Line Des... ↑↓	Unit Price	↑↓	Quantity	B
✓	1		Material					33.33		1.000	
✓	2		Material					45.45		1.000	
✓	3		Material					33.33		1.000	

Adding taxes & freight on the line level

A. Scroll down to the **LINE DETAILS** tab and can select/de-select a line item by clicking on the **CHECK BOX**

B. Under the line details, you can also select the line you want and scroll to the right side where you will see the column to enter **TAXES**, **OTHER CHARGES** and **FREIGHT** in this column.

The screenshot shows the 'LINE DETAILS' interface. At the top, there is a 'LINES' tab and a search bar. Below the search bar are buttons for 'Delete', 'Duplicate Lines', and 'More'. A table lists line items with columns: Line, Type, Line Description, Taxes, A., Other Charges, and Freight. The first row is highlighted in blue and contains a checked checkbox, the number '1A', 'Material', 'TEST PO 9', '0.00', 'I...', '0.00', and '0.00'. A red box highlights the checkbox and the input fields for Taxes, Other Charges, and Freight. A red letter 'A' is next to the line number, and a red letter 'B' is above the table header. At the bottom, there is a 'Rows Per Page' dropdown set to '10', a page indicator '1', and 'Page 1 of 1'.

Line	Type	Line Description	Taxes	A.	Other Charges	Freight
<input checked="" type="checkbox"/> 1A	Material	TEST PO 9	0.00	I...	0.00	0.00

Adding taxes & freight on header level

A. Click on the drop down next to amount/currency on top section of the screen.

B. You can enter your freight or taxes on the header level
(This will prorate the amount to all the available lines equally)

C. Once the amounts are entered you can click on the check mark icon

The image displays two screenshots of the ASCEND software interface, illustrating the steps to add taxes and freight on the header level of an invoice.

Top Screenshot: Shows the invoice header for "INV-05:22-000253 - Invoice1 For Order1 For T...". The "Invoice Amount" is set to "100.00 USD". A red box highlights the "100.00 USD" dropdown menu, labeled with a red 'A'. The "BASIC DETAILS" section includes fields for Invoice Name, Invoice Number, Supplier Name, Currency, and Invoice Type.

Bottom Screenshot: Shows the same invoice header, but with a dropdown menu open for "Invoice Value (USD)". The menu lists "Prorate" (checked), "Shipping & Freight (USD)", "Taxes & Charges (USD)", "Invoice Total (USD)", and "Accrued Taxes (USD)". Red boxes highlight the "Prorate" option in the dropdown menu, labeled with a red 'B'. The "Invoice Amount" field now shows "100.00". The "Supplier Invoice Number" is "123".

Upload image / copy on invoice

A. Click on the **MORE ICON** on top right corner

B. Click **UPLOAD IMAGE** to upload the scan copy of invoice

C. Once the image is uploaded, click on **SEND TO BUYER** button

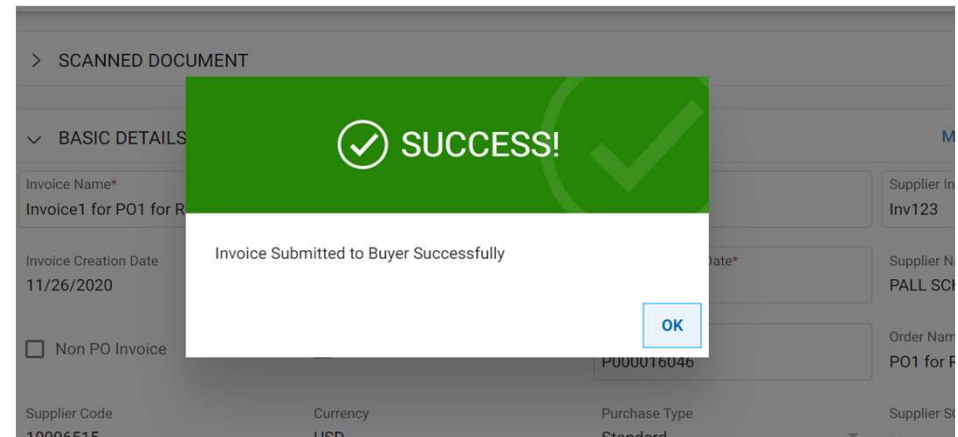
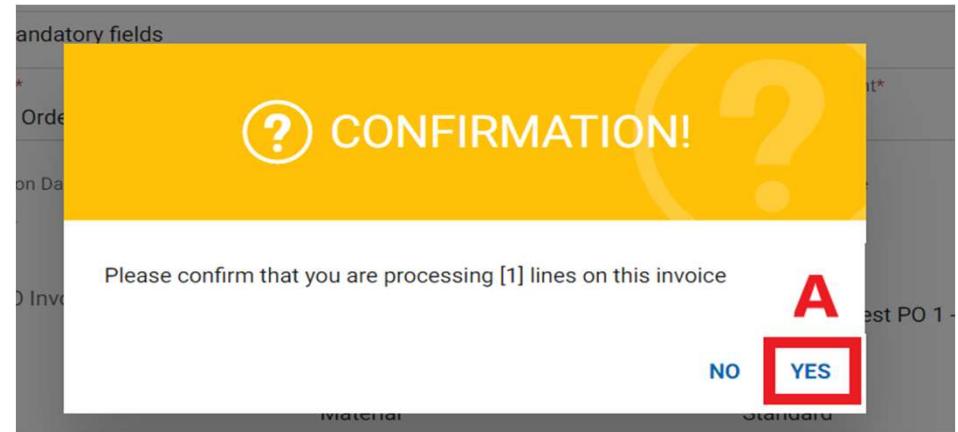
Note: It is mandatory to upload the image.

The screenshot displays the ASCEND UAT Invoice system interface. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'More'. The main content area shows the 'BASIC DETAILS' section for invoice INV-03:22-000208. The 'More' icon in the top right corner is highlighted with a red box and labeled 'A'. A dropdown menu is open, showing the 'Upload Image' button highlighted with a red box and labeled 'B'. At the bottom right, the 'Send To Buyer' button is highlighted with a red box and labeled 'C'. The interface also includes a search bar, a currency dropdown set to '100.00 USD', and a 'Comments' button.

Invoice creation set up page

A. Once submitted, you will see a confirmation message. Click **YES**

You will be directed to the **INVOICE** screen, where you will see the submitted invoice in **APPROVAL PENDING** status



Invoice Statuses

- **Draft:** Invoice is created; however, it is not submitted to Ascend (work-in-progress).
- **Sent for Processing:** pending validation with Ascend.
- **Exception:** Invoice is submitted, however there is a discrepancy in the ordered quantity or amount. This is being reviewed internally by Ascend and it will either be approved or returned with comments.
- **Matched:** Invoice amount is matched to the receipt amount.
- **Sent For Payment:** Invoice is sent for payment.
- **Invoice Paid with Remittance:** You can view remittance information in the submitted invoice.
- **Cancelled:** Invoice is cancelled by Ascend.

Create a Credit Invoice

Also known as Credit Memo

Credit Invoice

A: To issue a credit invoice to your customer, click on the **INVOICE** tab from the home page

B: Click on the **INVOICE** that is applicable to the sale for which the credit Invoice is to be applied

*If there are a bulk credit invoice outside GEP SMART, please send it on Ascend, AP
<accountspayable@ascendmaterials.com>*

The screenshot shows the Ascend UAT web application interface. The navigation menu at the top includes Catalog, Sourcing, Contract, Purchasing, **Invoice** (highlighted with a red box and labeled 'A'), and Supplier. A search bar is located on the right. The main content area is titled 'Documents' and has tabs for 'INVOICE' and 'CREDIT MEMO'. Below the tabs are three summary cards: 'All 2', 'Draft 1', and 'Exception 1'. A table of documents is displayed below, with columns for Document Name, Document Number, PO Number, Supplier Name, Supplier Contact, Invoice Status, Supplier Invoice Number, and Supplier. The second row of the table, 'Invoice1 for Order1 for Test PO 1 - Sup...', is highlighted with a red box and labeled 'B'. The table footer shows 'Rows Per Page: 10' and '1 - 2 Of 2'.

Document Name	Document Nu...	PO Numb...	Supplier Name	Supplier Cont...	Invoice S...	Supplier Invoi...	Supplier
Invoice2 for Order1 for Test PO 1 - Sup...	SDN-03:22-000002	PO-03:22-000...	SupplierKK	Kunal Kadam	PO Based		03/30/20...
Invoice1 for Order1 for Test PO 1 - Sup...	INV-03:22-000208	PO-03:22-000...	SupplierKK	Kunal Kadam	PO Based	1234	03/30/20...

Credit Invoice

C: Click on the **MORE** icon in the upper right-hand corner

D: Select **CREATE CREDIT INVOICE**

The screenshot displays the ASCEND system interface for an invoice. The top navigation bar includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. The main header shows the invoice ID 'INV-03:22-000208 - Invoice1 For Order1 For T...' and a 'More' icon highlighted with a red box (C). Below the header, the 'BASIC DETAILS' section is visible, containing a table with the following data:

Invoice Name	Invoice Number	Invoice Amount	Supplier Invoice Number	Invoice Creation Date	Supplier Invoice Date
Invoice1 for Order1 for Test...	INV-03:22-000208	100.00	1234	03/30/2022	03/30/2022

A dropdown menu is open from the 'More' icon, showing the following options: 'Export To PDF', 'Print Invoice', and 'Create Credit Invoice'. The 'Create Credit Invoice' option is highlighted with a red box (D).

Credit Invoice

A credit Invoice in **DRAFT** status is created

Within the **BASIC DETAILS** section update the following:

A: SUPPLIER MEMO NUMBER

ASCEND PERFORMANCE MATERIALS UAT

Catalog Sourcing Contract Purchasing **Invoice** Supplier

Search

100.00 USD Comments

← CM-03:22-00017 Draft

Home

My Tasks

Create

Supplier Profile

Basic Details

Line Details

Manage Optional Fields

∨ BASIC DETAILS

* Indicates mandatory fields

Credit Memo Name*	Credit Memo Number	Supplier Memo Number*	Purchasing Organization	Invoice Number	Currency
Credit Memo1 for Invoice1 ...	CM-03:22-00017		APM-APM	INV-03:22-000208	USD
Order Number	Supplier Invoice Number	Billable	Invoice Creation Date	Supplier Invoice Received Date	Invoice Received On
PO-03:22-000694	1234	No	03/30/2022	03/30/2022	03/30/2022
Memo Received On*	Memo Creation Date	Supplier Memo Date*	Purchase Type	Supplier Code	Supplier Tax Identification Number
03/31/2022	03/31/2022	03/31/2022	Material	PC-2022.000174	

Credit Invoice

Once you enter the mandatory details:

B: In the Credit Invoice, click on **MORE** option from the top right-hand corner.

C: From the MORE option, click on **UPLOAD IMAGE**

You need to upload the supporting documents here

ASCEND PERFORMANCE MATERIALS

Catalog Sourcing Contract Purchasing **Invoice** Supplier

Search

100.00 USD

Comments More

← CM-03:22-00017 Draft

Basic Details

Line Details

Manage Optional

* Indicates mandatory fields

Credit Memo Name*	Credit Memo Number	Supplier Memo Number*	Purchasing Organization	Invoice Number	Currency
Credit Memo1 for Invoice1 ...	CM-03:22-00017		APM-APM	INV-03:22-000208	USD
Order Number	Supplier Invoice Number	Billable	Invoice Creation Date	Supplier Invoice Received Date	Invoice Received On
PO-03:22-000694	1234	No	03/30/2022	03/30/2022	03/30/2022
Memo Received On*	Memo Creation Date	Supplier Memo Date*	Purchase Type	Supplier Code	Supplier Tax Identification Number
03/31/2022	03/31/2022	03/31/2022	Material	PC-2022.000174	

LINE DETAILS

Indicates mandatory fields

ASCEND PERFORMANCE MATERIALS

Catalog Sourcing Contract Purchasing **Invoice** Supplier

Search

100.00 USD

Delete

Upload Image

Export To PDF

← CM-03:22-00017 Draft

Basic Details

Line Details

* Indicates mandatory fields

Credit Memo Name*	Credit Memo Number	Supplier Memo Number*	Purchasing Organization	Invoice Number	Currency
Credit Memo1 for Invoice1 ...	CM-03:22-00017		APM-APM	INV-03:22-000208	USD
Order Number	Supplier Invoice Number	Billable	Invoice Creation Date	Supplier Invoice Received Date	Invoice Received On
PO-03:22-000694	1234	No	03/30/2022	03/30/2022	03/30/2022

Credit Invoice

For Purchase type:
Material and Material Stock

You can enter values in either **UNIT PRICE** if the credit type selected is **Amount**. You can edit **CREDIT QUANTITY** if the credit type selected is Quantity. you can click on **SEND TO BUYER** on the bottom right corner of the screen

> PAYMENT AND DELIVERY DETAILS

LINE DETAILS Indicates mandatory fields

LINES

Search Delete Manage Columns Show Filters

Line	Type	Line Descript...	PO Line Item N...	Category	Credit Type	Unit Price	Quantity
1	Material	Zno Microban	1-Zno Microban	IS:ConstSewerInsta...	Quantity	2.00	452.00

Rows Per Page: 10

Page 1 of 1

Credit Invoice

For Purchase type
Blanket/Services

The credit type by default is amount as quantity is always 1.

If you are creating a full credit for the invoice, make sure you select full credit **Yes** in the Line details full credit column. If the credit is for a partial amount, select full credit **No**

Once filled, you can click on **SEND TO BUYER** on the bottom right corner of the screen

LINE DETAILS

LINES

Search Delete Manage Columns Show Filters

Line	Type	Line Descript...	PO Line Item N...	Category	Unit Price	Credit Type	Full Credit	Quantity
1	Fixed	EQP1	1-EQP1	CNL:ConsultBusine...	1.00	Amount	Yes	1.00

LINE DETAILS

LINES

Search Delete Manage Columns Show Filters

Line	Type	Line Descript...	PO Line Item N...	Category	Unit Price	Credit Type	Full Credit	Quantity
1	Fixed	EQP1	1-EQP1	CNL:ConsultBusine...	1.00	Amount	No	1.00

Rows Per Page: 10

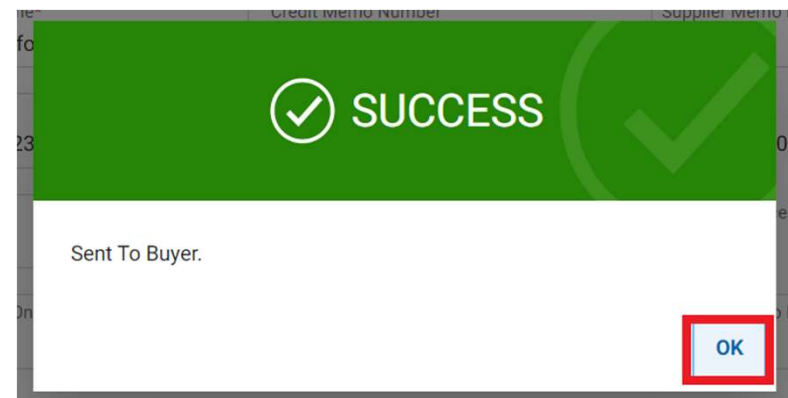
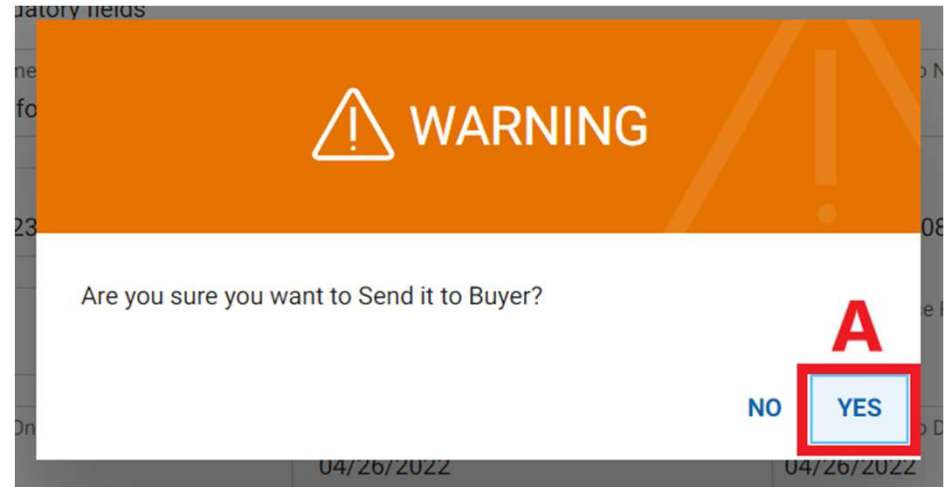
Save Send To Buyer

Credit Invoice

A: The pop-up notification asks you to confirm your submission. Click **YES** to proceed

The **SUCCESS** notification indicates that your credit Invoice has been successfully sent to Ascend

*You will be redirected to the **CREDIT INVOICE** page. The status of the credit Invoice will be in **SENT TO BUYER***



Credit Invoice Statuses

- **Draft:** Credit Invoice is created; however, it is not submitted to Ascend (work-in-progress)
- **Sent to Buyer:** Credit Invoice is submitted to Ascend.
- **Sent for Payment:** Credit Invoice is submitted and approved by Ascend.
- **Credit Invoice Paid with Remittance:** You can view remittance information in the processed credit invoice.
- **Cancelled:** Credit Invoice is cancelled.

Create a Subsequent Debit Note

What is a Subsequent Debit Note?

A **Subsequent Debit Note** is a document created by a supplier with reference to a PO.

SDN is a supplemental charge (extra fee from the Supplier) which can be sent to buyer after sending the invoice.

Subsequent Debit Note

A: To issue a subsequent Debit Note, click on the **PURCHASING** tab from the home page

B: From the documents under Purchasing, click on the **ORDER**

C: Click on the order for which you want to create a Subsequent Debit Note

*Note: The order should be in **Supplier Acknowledged** status.*

ASCEND PERFORMANCE MATERIALS UAT

Catalog Sourcing Contract **Purchasing** Invoice Supplier

Search

Documents

B

ORDER RETURN NOTE SERVICE CONFIRMATION ASN

All 2 Supplier Acknowledged 1 Sent To Supplier 1

Manage Attributes Filters

Order Name	Order Num...	Supplier	Purchase T...	Created By	Created On	Order Val...	Status
Order1 for DO NOT USE - Test PO 2 - ...	PO-03:22-000695	SupplierKK	Material	KK Admin	03/30/2022	200.00 USD	Sent To Supplier
Order1 for Test PO 1 - Supplier KK	PO-03:22-000694	SupplierKK	Material	KK Admin	03/30/2022	100.00 USD	Supplier Acknowledged

Subsequent Debit Note

D: In the order, click on **MORE** option from the top right-hand corner.

E: From the MORE option, click on **CREATE SUBSEQUENT DEBIT**

Once you click on Create Subsequent Debit, you will get a **Success Response**

The image displays two screenshots of the GEP SMART interface for an order titled "ORDER: Order1 For Test PO 1..".

Top Screenshot: The order status is "Supplier Acknowledged" with a value of "100.00 USD". A "Comments and Attachments" button is visible. A red box highlights the "More" menu icon in the top right corner, with a red letter "D" next to it.

Bottom Screenshot: The "More" menu is open, showing options: "Create Advance Invoice", "Create Credit Invoice", and "Create Subsequent Debit". The "Create Subsequent Debit" option is highlighted with a red box and a red letter "E".

The main content area shows "BASIC DETAILS" with a note "* Indicates mandatory fields". Below this, a table displays order information:

Order Number	Order Name	Order Contact	Order Author
PO-03:22-000694	Order1 for Test PO 1 - Supplier KK	KK Admin	KK Admin

Subsequent Debit Note

A Subsequent Debit Note in **DRAFT** status is created

Within the **BASIC DETAILS** section update the following:

A: SUPPLIER INVOICE NUMBER

B: INVOICE AMOUNT

C: SUPPLIER INVOICE DATE

SDN-03:22-000002 - Invoice2 For Order1 For T...

0.00 USD  | 

Draft

Basic Details		Supplier Details		StakeHolder Details		Payment And Delivery...		Line Details	
<div style="display: flex; justify-content: space-between;"> Basic Details Manage Optional Fields </div>									
* Indicates mandatory fields									
Invoice Name*	Invoice Number	Invoice Amount*	Supplier Invoice Number*	Invoice Creation Date	Supplier Invoice Date*	Supplier Name	<input type="checkbox"/> Multi PO Invoice		
Invoice2 for Order1 for Test PO 1 - S...	SDN-03:22-000002	100.00	12345	03/30/2022	03/30/2022	SupplierKK			
Order Number*	Order Name	Supplier Code	Currency	Purchase Type	Invoice Type	<input type="checkbox"/> GR-IV			
PO-03:22-000694	Order1 for Test PO 1 - Supplier KK	PC-2022.000174	USD	Material	SubSequentDebitNote				

Subsequent Debit Note

Once you enter the mandatory details:

D: In the SDN, click on **MORE** option from the top right-hand corner.

E: From the MORE option, click on **UPLOAD IMAGE**

You need to upload the supporting documents here.

The image shows two screenshots of the GEP SMART interface. The top screenshot displays the 'ORDER: Order1 For Test PO 1..' screen with a 'Supplier Acknowledged' status and a value of '100.00 USD'. A 'More' button is highlighted with a red box and labeled 'D'. The bottom screenshot shows the 'SDN-03:22-000002 - Invoice2 For Order1 For T...' screen in 'Draft' status. A dropdown menu is open, and the 'Upload Image' option is highlighted with a red box and labeled 'E'. The interface includes sections for 'Basic Details', 'Supplier Details', and 'Stakeholder Details', with a note that an asterisk indicates mandatory fields.

Subsequent Debit Note

Once the supporting documents are uploaded, under the Line details, users can enter the required amount in:

A: OTHER CHARGES

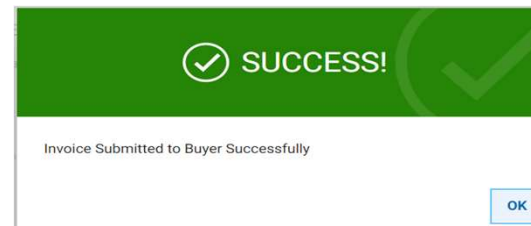
B: Once you enter the amount, click on **SEND TO BUYER**

Once you click on SEND TO BUYER you will get a **Success Response**

*Note: You cannot make any changes in the **unit price** or the **quantity**.*

The screenshot shows the 'LINE DETAILS' interface. At the top, there is a search bar and several action buttons: 'Delete', 'Manage Columns', and 'Show Filters'. Below this is a table with columns: 'Line', 'Type', 'Line Descript...', 'Other Charges', 'Freight', and 'Ordered Quantity'. The 'Other Charges' column for line 1 is highlighted with a red box and labeled 'A'. The value '0.00' is entered in this field. The 'Freight' column has a value of '0.00' and the 'Ordered Quantity' column has a value of '1.00'. At the bottom right, the 'Send To Buyer' button is highlighted with a red box and labeled 'B'. There is also a 'SAVE' button next to it. A legend indicates that a red outline indicates mandatory fields.

Line	Type	Line Descript...	Other Charges	Freight	Ordered Quantity
1	Material	Test PO 1	0.00	0.00	1.00



Subsequent Debit Note Statuses

- **Draft:** Subsequent Debit Note is created; however, it is not submitted to Ascend (work-in-progress).
- **Sent to Buyer:** Subsequent Debit Note is submitted to Ascend.
- **Sent for Payment:** Subsequent Debit Note is submitted and sent for payment.

Customer support

GEP Customer Support is available 24x5
support@gep.com

- Europe: +42 022 598 6501
- Switzerland: +41-445859014
- UK: +44-20-3478-6123
- USA: +1-732-428-1578
- Australia: +61-2-8518-1914
- Asia: +91-22-6137-2148

GEP SMART URL: smart.gep.com



