

# webforms

# Quick Reference

Version 6.0

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## Background & Overview

webforms is the latest addition to the Progressive B2B product range. Ideal for Trade Partners who are yet to become EDI (Electronic Data Interchange) capable and a natural replacement for fax & email, webforms is a new and exciting web based application which has been introduced **FREE of CHARGE** for Progressive Trade Partners. webforms provides Trade Partners with an opportunity to trade electronically and enjoy similar benefits to those currently engaged in EDI with Progressive.

Recommended system requirements for webforms include;

- A reliable internet connection (broadband is recommended)
- Microsoft Internet Explorer™ version 5.5 or higher
- Adobe Acrobat Reader™ version 5.1 or higher

**Note:** Adobe Acrobat Reader™ can be downloaded free from <http://www.adobe.com>

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# Contact Us

The Progressive eBusiness Team are contactable for all webforms related support and enquiries on;

 +61 2 8885 3100 (8am to 5pm Mon – Fri AEST)

 [ebusiness@woolworths.com.au](mailto:ebusiness@woolworths.com.au)

 [www.progressive.co.nz/PELB2B](http://www.progressive.co.nz/PELB2B)

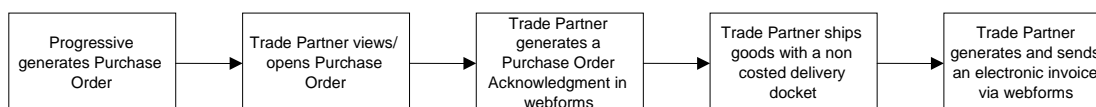
## Tips & General Notes

1. In the event of a **webforms outage** your Purchase Orders will be transmitted via fax. Please ensure your fax number with Progressive is correct and up to date.
2. Purchase Order **Email notifications** are sent to the nominated email address provided during the registration process. Should you wish to make alterations to the email recipient please see the 'Partner Configuration' section of this document.
3. **Forgotten Password** – Should you be unable to recall your password, click on 'Reset Password' on the Trade Partner Login page.

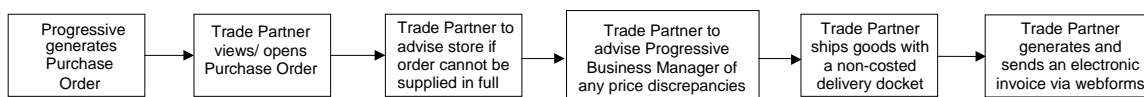
## Supply Chain Process Overview

Progressive currently supports three supply chain processes. Direct to Store (DSD) deliveries, Distribution Centre (DC) deliveries and Fresh Produce (Fruit & Veg.) deliveries.

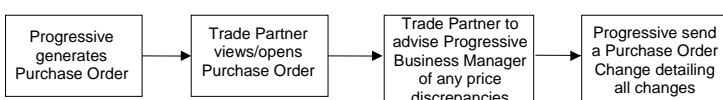
### Distribution Centre (DC) Purchase Orders



### Direct to Store (DSD) Purchase Orders



### Fresh Produce (Fruit & Veg.) Purchase Orders




## Logging In

To login to webforms:

Step	Action
1.	Go to;  <a href="http://www.progressive.co.nz/webforms">http://www.progressive.co.nz/webforms</a>
2.	Select the "Launch webforms" link
3.	Enter your login details, and click 'Save Login Details'
4.	Click 'Login' <b>RESULT:</b> you should now be able to access your webforms account

## Document Management

'Document Management' is represented by a number of folders and functions similar to email applications i.e. Microsoft Outlook. The Inbox, Draft, Outbox, Error and Sent folders are default folders under 'Document Management'. The folders under Document Management retain 3 months of Historical data.

Folder	Description
<b>Inbox</b>	All Purchase Orders will be delivered into the Inbox folder. Unopened Purchase Orders appear in bold font. <b>Tip:</b> To refresh the Inbox click on the refresh  icon on the web browser.
<b>Outbox</b>	The <i>Outbox</i> holds messages that are in the process of being sent from <b>webforms</b> to Progressive. <b>Tip:</b> Messages sitting for extended periods in the 'Outbox' could indicate a problem with <b>webforms</b> . If the problem persists, contact your <b>webforms</b> administrator or Woolworth's eBusiness Support.
<b>Sent</b>	The Sent folder contains documents that have successfully been sent from <b>webforms</b> to Progressive.
<b>Draft</b>	This draft folder is a temporary storage folder for documents yet to be finalised and sent to Progressive.
<b>Error</b>	This folder is not applicable to Progressive at this time.

## Printing Documents

webforms provides functionality for the printing of documents. To print documents in webforms;

Step	Action
1.	Locate the document you wish to print
2.	Option 1: Tick the checkbox adjacent to document to print and select the print link at the top right hand of the screen. To print multiple documents; select the box for each document or select the check box at the top and all purchase orders will be automatically selected. <b>RESULT:</b> All selected documents will open within one PDF document for you to print.
3.	Option 2: Open the Purchase Order. Select the Print link at the top right hand side of the screen. <b>RESULT:</b> The Purchase Order will be displayed in a PDF document for you to print.

## Accessing Purchase Orders

To access your Purchase Orders in webforms;

Step	Action
1.	Click on 'Inbox' located under Document Management <b>Note:</b> For your reference, if your document number begins with an S it is a DC order, if it begins with a D then it is a DSD order and if it begins with 00 then it is a Fresh Produce (Fruit & Veg.) order.
2.	Click on the Purchase Order Document Number <b>RESULT:</b> you should now be able to view the selected Purchase Order

## Reviewing Purchase Order Changes

*(This process is applicable to Fresh Produce (Fruit & Veg.) Trade Partners Only)*

Purchase Order Changes can be identified in your 'Inbox' by the document type (i.e. Change order) and the version number (i.e. a version number that is greater than '001').

By default, a Change Purchase Order will be compared to the previous Purchase Order version. Changes are outlined in red on the Purchase Order screen.

**Note:** To turn off the compare mode select the 'Off' option at - **Compare With Previous Version**  On  Off

When opening a Change Purchase Order, changes can be identified at each line item level. Unique prefixes are displayed in the 'ST' Column indicating the nature of the change;

'C' – A change to the order line

'A' – Line item added

'D' – Line item deleted

Blank – no change

## Creating a Purchase Order Acknowledgement

*(This process is not applicable to Fresh Produce (Fruit & Veg.) or Direct to Store Trade Partners)*

Purchase Order Acknowledgements are only required for Distribution Centre (DC) (Warehouse orders) and provide three options; Accept, Reject and Modify. Trade Partners who deliver Direct to Stores or who are Fresh Produce (Fruit & Veg.)

Trade Partners are not required to create and send a Purchase Order Acknowledgement.

Step	Action
1.	Access a Purchase Order (see Accessing Purchase Orders)
2.	Click on 'Accept', 'Reject' or 'Modify'. If you select: <ul style="list-style-type: none"> <li>• <b>'Accept'</b> – Acknowledgement that you accept the order in full.</li> <li>• <b>'Reject'</b> – Acknowledgement that you reject the order in full.</li> <li>• <b>'Modify'</b> – Acknowledgement that only parts of the order can be met.</li> </ul>
3.	Enter details into the 'Your Reference No' field (number / reference relevant to your Company)
4.	Click 'Send'
5.	You will be prompted to confirm, click 'OK'
6.	You will be prompted to confirm the Purchase Order Acknowledgements has been sent, click 'OK' <b>Notes:</b> * Should you click on 'Save' the document will be stored in the 'Drafts' folder, located under 'Document Management'. * Text entered in the remarks field is for your records and is not transmitted to Progressive.

# Creating an Invoice and Delivery Docket

*(This process is not applicable to Fresh Produce (Fruit & Veg.) Trade Partners)*

Electronic Invoicing allows Trade Partners to create and send invoices for Purchase Orders received. webforms also provides functionality for Trade Partners to produce Delivery Dockets (Picking Slips / Shipping Manifest) which are Progressive compliant. A non-costed delivery docket is similar to a traditional costed invoice minus any dollar (\$) values and the "Tax Invoice" label.

If creating your own Delivery Docket it must contain the following information at a minimum (in addition to the standard identification elements such as company name);

- ⇒ Line Item Identification (excluding values)
- ⇒ Line items quantities (excluding values)
- ⇒ Purchase Order Number
- ⇒ Delivery Location & Date

Step	Action
1.	Select the Purchase Order to be Invoiced from the 'In Box' summary list.
2.	Select the check box adjacent to the Order Line Item (s) you intend to Invoice. <b>Tip:</b> Only select a checkbox for line items which are to be invoiced. Alternatively, select the checkbox adjacent to 'Order Line No' to select all lines in the Purchase Order. Line items on a modified Purchase Order Acknowledgment with a zero '0' quantity should not be invoiced.
3.	Click on 'Add to Invoice' (located just above item detail lines).
4.	Enter your 'Invoice Number' (number relevant to your company)
5.	Select the relevant 'Invoice Type' from the drop down box. <b>Note:</b> a 'Corrective Invoice' type should only be selected if being sent within 24 hours of the original Invoice.
6.	Select 'Invoice date' from field provided.
7.	If a Delivery Docket is required enter a Delivery Docket number (reference number relevant to your Company).
8.	Review your ABN / GST and Remit to Vendor numbers within the invoice and update if required.
9.	Update your line item information if required i.e. GTIN, QTY, Price and Consumer Units.
10..	If you need to add products to the invoice click on the 'ADD ROW' button and enter the product information.
11.	Click 'save' this will calculate totals within the Invoice and provide a link to print the Delivery Docket (if a Delivery Docket number was entered in step 7).
12.	If a Delivery Docket number was entered in Step 7 then: a. Adjacent to the Delivery Docket number appears an option to Print Delivery Docket' b. Click 'Print'
13.	Now you need to send the Invoice. Click 'Send'. You will be prompted with a confirmation message. Click 'Ok.' <b>RESULT:</b> Your invoice will now be sent to Progressive electronically.

## Exporting Documents

The 'Export' function allows users to download transactional data in XML (Extensible Mark-up Language) or Progressive EDIFACT format EANCOM2002. To export documents in XML or EDIFACT format;

Step	Action
1.	Locate the document you wish to export / download
2.	Open the document you wish to export
3.	Click on 'Export'.
4.	Select the download format required under the heading 'Type'. You will then be prompted to open or save the document.



## Searching for Documents

The 'Search' function in webforms allows users to locate documents.

Step	Action
1.	Click on 'Search Documents'
2.	Complete the required search criteria <b>Note:</b> 'webview Document Number' is your Woolworth Purchase Order number
3.	Select 'Submit' <b>RESULT:</b> Document will now be displayed if found.



## Creating a User

Creating a user allows each individual within an organisation to access webforms with a unique User ID and password.

Step	Action
1.	Open Administration menu by clicking on  icon
2.	Click on 'User Accounts'
3.	Click on 'Create'
4.	Enter new user information <b>Tip:</b> Ensure all email addresses are accurate. Should you reset a password; details will be forwarded to the nominated email address.
5.	Select relevant Group from the 'All User Groups' field
6.	Click on the  icon to move to the 'Member' field
7.	Click on 'Save' <b>RESULT:</b> New user has been created


## Creating a User Group

Creating user groups provides the user with the opportunity to assign limited permissions to specific groups. User groups are required to be configured prior to creating new users.

Step	Action
1.	Open Administration menu by clicking on the  icon
2.	Click on 'User Groups'
3.	Click on 'Create'
4.	Enter the name of the 'User Group' you wish to create (i.e. NSW - reference relevant to you)
5.	Click on the permissions to be allocated to the user group from the 'Available Permissions' field <b>Tip:</b> Multiple selections can be performed by holding the control key (Ctrl) and using the cursor to select the items you wish to move across into the Permissions box. Alternatively, to select all permissions, hold the shift key and the down arrow key until all permissions have been highlighted.
6.	Click on the  icon to move permissions selected to the 'Current Permissions' field
7.	Click on 'Save' <b>RESULT:</b> User Group has been created


## Partner Configuration

Partner Configuration allows you to update company information such as ABN / GST numbers, Remit to Vendor numbers and Purchase Order email notifications;

Step	Action
1.	Open Administration menu by clicking on  icon
2.	Click on ' Partner Configuration'
3.	Click on 'Partner Profile'
4.	Enter new or updated information <b>Tip:</b> Ensure all email addresses are accurate and use a comma to separate multiple email addresses
5.	Click on 'Save' <b>RESULT:</b> New or updated information will be sent to Progressive (for webforms purposes only) and a copy to your email for your records. If multiple emails entered all email addresses will receive an email notification when Purchase Orders are received in webforms.

## Manage Folders

The 'Manage' Folders function in webforms allows you to set up new folders, change the folder names or delete folders.

Step	Action
1.	Open Administration menu by clicking on  icon
2.	Click on ' Manage Folders'
3.	Click on 'Create' to set up a new folder.
4.	Enter the Folder Name (Name relevant to you)
5.	Click on 'Save'. <b>RESULT:</b> The new folder will be created and will now be listed under 'Document Management'.
6.	To move documents to a newly created folder simply access the summary listing. Select the document you want to move and click on the 'Move Document To' drop down list and select the folder you want to move the document to.

# Frequently Asked Questions (FAQ's)

QUESTION	ANSWER
Can I print more than one Purchase Order at a time?	Yes. Refer to the Quick Reference Guide 'Printing' options.
I was logged on earlier in the day and now I cannot logon again.	You need to ensure that you log off using the 'Logout' link on the screen. If the system times you out and logs you off automatically you need to wait for approximately 1 hour before trying to log back in again.
Do I need to acknowledge my Purchase Order if it is for a store?	No. If you have any questions please contact the Store directly.
I have acknowledged my Purchase Order but need to make a change to the acknowledgement.	You will need to make contact with your Progressive Rebuyer.
My Purchase Order is showing incorrect information (i.e. GTIN, prices, descriptions), what do I do to have this rectified?	You will need to make contact with your Progressive Rebuyer.
Am I required to send invoices using <b>webforms</b> ?	Yes. All invoices for Purchase Orders received in <b>webforms</b> must be sent electronically using the <b>webforms</b> functions. You do not need to send a hard copy of the invoice in the mail.  This process is not applicable to Fresh Produce (Fruit & Veg.) Trade Partners.
What paperwork do I send with the goods?	You no longer send the invoice with the goods. You must send an un-costed delivery docket.
Do I have to use the <b>webforms</b> delivery docket functionality?	No. You can use your own format as long as it contains the following information (in addition to standard identification elements such as company name); - Line Item Identification (excluding values) - Line Items quantities (excluding values) - Purchase Order Number - Delivery Location and Date
Can I print more than one Delivery Docket or Invoice at a time?	No. Not at the moment.
I need to change the email address that Progressive sends the Purchase Order alerts.	Go to Partner Config. See Quick Reference Guide 'Partner Configuration' section.
Can I register more than 1 email address to receive the Purchase Order notifications?	Yes. See Quick Reference Guide 'Partner Configuration' section.
Can I get a dummy order before I go live?	No. We do not have this facility at present.
Do you have a demo website?	No. We are currently working on this and it will be available sometime in the near future.
What is my RTV Number?	Your RTV number is your 'Remit to Vendor' number that is required on all invoices. This is a different number to your Vendor number (however you will notice that the first five digits are the same) which appears on your Purchase Order. If you have any questions in relation to your RTV number please contact our Transaction Processing Centre (TPC) on:  Phone: +61 3 6245 6668 Email - <a href="mailto:tpc@woolworths.com.au">tpc@woolworths.com.au</a>

QUESTION	ANSWER
Why did I get a PO via email/fax when I am on <b>webforms</b> ?	The PO you actually received would be a PO Change. Currently all Purchase Order Changes (except Fresh Produce (Fruit & Veg.) Trade Partners) are sent via email or fax and not through to <b>webforms</b> . This will be changing in the future.
How do I reset my password?	On the <b>webforms</b> login screen click on the <a href="#">Reset Password</a> link under the 'Change Password' Button on the bottom left of the login screen.  Your new password will be emailed to the nominated email address within a few minutes.
What is a Group Email Address?	This is an email address accessible by more than one user in your organisation. It is recommended that group email addresses be used for alerts. This is to ensure that there is always access and awareness of new alerts and purchase orders.
I have noticed messages sitting in my Outbox for extended periods.	Verify you have connectivity, refresh your outbox by clicking on  icon on the web browser. If the problem persists, please contact your <b>webforms</b> administrator or Woolworth's eBusiness team.
Can I make adjustments to an invoice already sent to Progressive?	Should you require any adjustments to be made to an original tax invoice which has been sent you will be required to generate another invoice by selecting Corrected Invoice from the 'Invoice Type'. Corrected Invoices will only be accepted if created within 24 hours of the original invoice being sent.  If an invoice needs correcting outside of the 24 hours contact (TPC):  Phone: +61 3 6245 6668 Email - <a href="mailto:tpc@woolworths.com.au">tpc@woolworths.com.au</a>
When I send through a Modified Purchase Order Acknowledgement will the changes be updated on the original purchase order?	No. The original Purchase Order will not be updated with changes made on the Purchase Order Acknowledgement.
How secure is <b>webforms</b> ?	<b>webforms</b> uses 128bit SSL (Secure Socket Layer Encryption) common to many secure web based applications. <b>webforms</b> has its own 3 tier firewall protection, security administration, intrusion detection, virus protection, authentication and authorisation; and encryption offering strong data integrity and confidentiality.
How do I access <b>webforms</b> ?	You can access <b>webforms</b> via the following:  <a href="http://www.progressive.co.nz/webforms">http://www.progressive.co.nz/webforms</a>
What is my username?	If you are unsure of your user name, contact your organisations ' <b>webforms Administrator</b> '. This Super User controls your internal User Groups and Profiles.  If you require further assistance contact Woolworth's eBusiness Support.
I am unable to print my Purchase Order; my computer is asking me to select an application to open the Purchase Order?	Adobe Acrobat™ Version 5.1 or higher is required to view documents in <b>webforms</b> .  Visit <a href="http://www.adobe.com">http://www.adobe.com</a> to download Adobe Acrobat™.
I have received an email advising me that a Purchase Order has been sent to me but I cannot locate it in my inbox.	Your <b>webforms</b> session may have timed out. If your session has timed out you will be required to login again.  If you are already logged into <b>webforms</b> and have the "Inbox" open you may need to refresh your browser. To refresh press F5 or click the refresh option in your web browser, your most recent orders should be visible at the top of the "Inbox" list.

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