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Stant **WORK INSTRUCTIONS**	WOR.PUR.00010 Rev. 1	29 AUG 2022

Title: Plex UX Supplier Portal Navigation

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1. <u>Revision history</u>

REV	DATE	REVISED BY	SUMMARY OF CHANGE
1	8/29/2022	Erin Wilde	New document

2. <u>Purpose</u>

Provide an overview to Stant's Suppliers on the Plex Supplier Portal, and provide detailed instructions on
- Plex login
- Review and acknowledgement of Releases
- Maintain Supplier contact information
- Upload PPAP packages and download scorecards

3. <u>Work Instructions</u>

Plex is a cloud-based Enterprise Resource Planning (ERP) system used by Stant to manage the day-to-day business activities ranging from business management to production. It is highly encouraged that any supplier affiliated with Stant use the Plex Supplier Portal. Benefits to using the Supplier Portal include:

- Direct and digital communication in collaboration with Stant on a secure and proprietary portal, eliminating emails/faxes, to improve communication response time. These types of communications could include purchase requirements, release information, quality documentation, and other general correspondence.

- Online bar-coding capabilities to enable accurate and timely receipts.

- Real-time receipt acknowledgment of key information.

- Easy access for review and analysis of planned material releases.

- In-house bar code label printing for shipping material.

- Retrieve Quality Control documentation and provide feedback within the quality review process
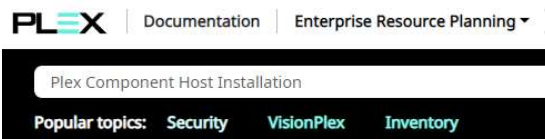
3.1   Setup and Login

When using the Supplier Portal, proper setup and login methods are required. It is recommended to use Chrome for optimal performance, when applicable.

3.1.1   Component Host Setup

The Component host allows users to upload and download documentation. If you are unable to complete these actions, the Component Host will need to be reinstalled. To install the Component Host, complete the following:

1. Access Plex Documentation by entering the link into the browser's URL
   https://docs.plex.com/pmc/en-us/Home.htm

2. On the home screen, type "Plex Component Host Installation" into the search field and click the Search icon.

3. Many results will appear. Click on the Plex Component Host link.

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4. Follow the steps for the Windows or MacOS version, depending on the user's operating system.
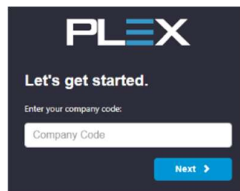

3.1.2 Log in

When logging into Plex UX Supplier Portal, users <u>must</u> log in using their IAM account.
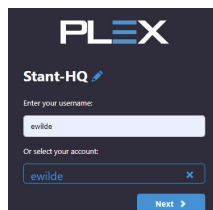To log into the Supplier Portal, complete the following:

1. Navigate to Plex by entering https://cloud.plex.com/ into your browser.

2. Click the IAM Login button.

3. Input the company code and click the Next button.

4. Input your provided Username in the Username field and click the Next button.
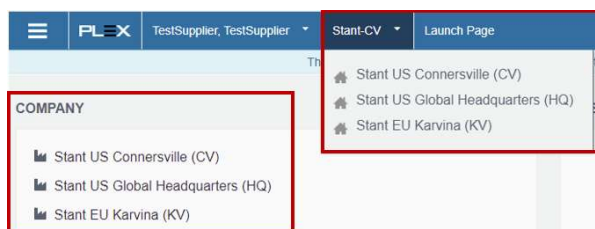

5. Input your Password in the Password field and click the Sign in button.

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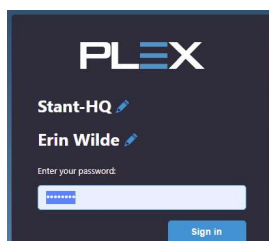
6. After log in is complete, from the Launch page or Navigation bar, select a PCN/Plant location, if applicable.


3.2   Supplier Menu Nodes and Actions

Once accessed, users can navigate the Supplier Portal using the menu nodes provided in order to complete the following:

- Access Release information by using the Supplier Purchasing/Receiving Portal menu node.
- Maintain Supplier contact information by using the Supplier Contacts menu node.
- Upload PPAP packages, download scorecards, and more using the Supplier Portal – Quality menu node.

3.2.1   Requirements and Shipping

The Supplier Purchasing/Receiving Portal menu node allows users to access releases information and receipt reports. Online Releases allows users to review current and upcoming release information, whereas Receiving Report allows users to review and analyze previous release information. It is the Supplier's responsibility for expediting a release. It is recommended to contact a Stant Planner to coordinate adjustments to scheduled dates.

NOTE: Do not acknowledge a release if a due date will not be met because of material issues or outside lead time.
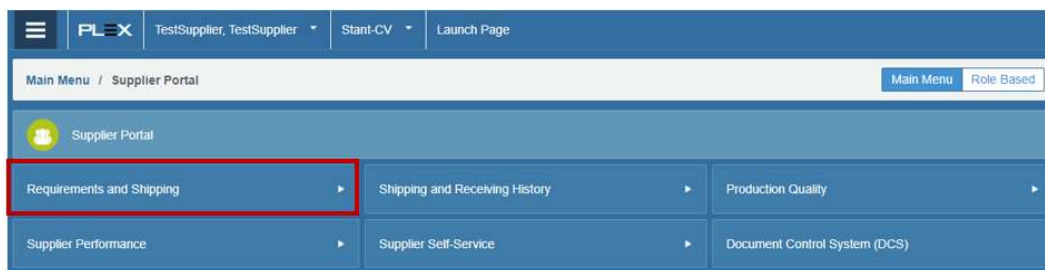
3.2.1.1   Online Releases to Suppliers

Planned and forecast releases are subject to change. It is **mandatory** to check the Online Releases weekly to review scheduled shipment information. Forecast information in Plex is the amount we expect to use in our plants in any given week, regardless of any inventory that is on hand. Due dates are the dates Stant expects to receive the shipment.

Each time a forecast is updated, the new forecast will need to be acknowledged. Acknowledge all forecast lines for which you are comfortable, keeping in mind we may have inventory on hand. If there are items that are not acknowledged, especially for the upcoming 2 to 4 weeks, you will be contacted by one of our planners. For questions about how much inventory Stant would be committed to in the event of a major forecast change, please consult your contact or contact your Commodity Manager.

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Please bear in mind that forecasts change, and that even though we may project out 16 weeks, not all of that should be considered Firm. Firm releases should not be changed unless you have been contacted by a planner and the supplier agrees to the change in advance. New firm releases will be updated, usually weekly, for most suppliers.

To view and acknowledge current and upcoming release information, complete the following:

1. Click the Online Releases to Suppliers menu node.

2. Using the Online Release to Suppliers filter fields, enter the desired criteria and click the Search button.

3. On the result grid, review release information such as Release and PO number, release dates, Quantity, Acknowledgement etc.
   NOTE:
   - The Planner column provides a Stant point of contact who is assigned to the release.
   - The Ship date differs from the due date due to process routing at Stant, which is determined on the into terms.
     - For EXW, the ship date and due date stay the same.
     - For DAP/DDP, ship date will back out based on transit time.

4. To Acknowledge releases, complete the following:

   WARNING: If the supplier can NOT meet shipment, it is mandatory to reach out the Stant Planner to advise of date shipment can be made.

   a. For selecting specific releases, select the box(es) for the release number(s) in the Acknowledge Release column. To select all release numbers, click the box in the column header.

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b. On the action bar, click Acknowledge Selected Releases from the Acknowledge dropdown to acknowledge the releases selected.
NOTE: Users can click the Acknowledge All button to complete acknowledgements for all releases listed. Make sure that all release should be acknowledge <u>before</u> clicking this button.

c. Once a release has been acknowledged, an automatic time stamp will be added to the release Acknowledgement column.

5. To ship and print a release, complete the following:

a. Click the line item to select the Release No, and click the Label and Ship link on the action bar.

b. On the Add Inventory screen, input the Shipper Number in the Shipper Number or Packing Slip Number field and click the OK button.
**WARNING:**
- It is critical that the value entered in the Shipper Number field <u>matches</u> the value that is printed on the AR invoice sent to Stant. This cannot (!) be a date. This field can be listed on the invoice under a different reference (Bill of Lading Number, invoice number, Tracking Number, Shipper Number, etc.), but the value must match.
- Whatever reference (BOL, Shipper, Invoice Number, etc.) is chosen to be entered into the Shipper Number field, must uniquely identify and link the AR invoice with the shipment in a 1-to-1 relationship: 1 invoice may not have multiple "shipper numbers" listed; 1 "shipper number" may not be used across multiple invoices.
- For specific part types, it is required to add a tracking number to the Supplier Lot Tracking Number field.

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c. A notification will appear indicating your container was added.

d. Repeat the above steps for any additional parts/containers that need to be added to the release.

e. Once complete, click the Print Container Labels link on the action bar to print the labels.
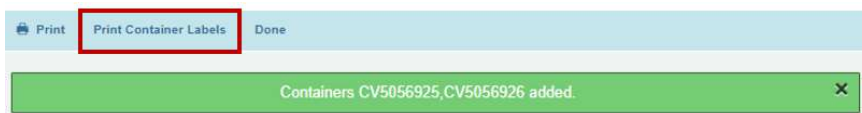
f. If the shipping process is complete, click the Done link on the action bar.
    NOTE: If the ship and label process has not been completed, users are able to delete a container. If more container labels were created for more than the shipment amount, reach out to the planner to make the adjustment.
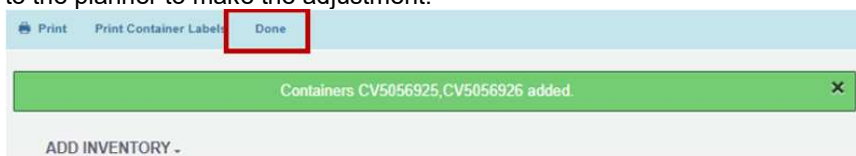
g. Once this process is complete, users will automatically be directed to the Labeled Inventory - Ship screen. Click the Search button to view containers added, but NOT shipped.

h. Under the checkbox column, select the box for containers assigned to the release.

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i.   Click the Ship link on the action bar.
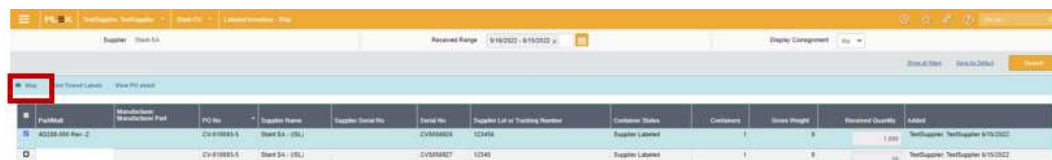
j.   The shipping paperwork will automatically prompt for printing and should be included with the packing slip for the shipment.
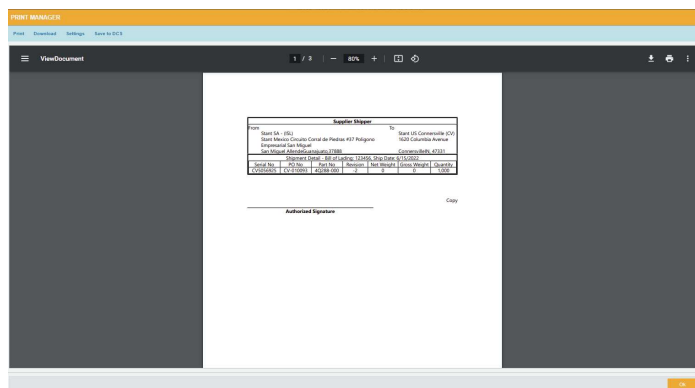
3.2.1.2   Receipt History

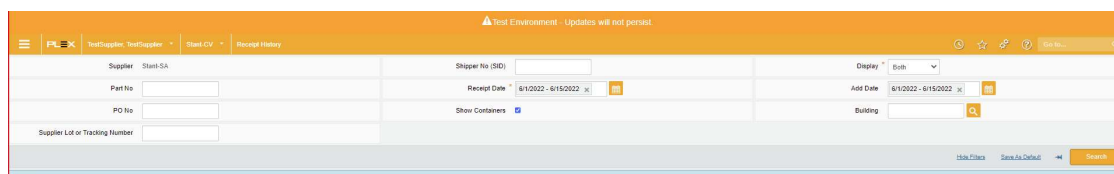To review previous receipt information, complete the following:

1.   From the Supplier Portal menu node, click the Shipping and Receiving History menu node.

2.   Click the Receipt History menu node.

3.   Using the Receipt History filter fields, enter the desired criteria and click the Search button.

4.   On the result grid, review release information such as Release number, Release dates, Quantity, Unit Price, etc.

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5. Users can click the attachments to review more details pertaining to the release.

3.2.2   Supplier Contacts

The Supplier Contacts menu node allows suppliers to update and maintain their contacts. These contacts will have the ability to receive communications. It is the responsibility of the supplier to maintain all points of contact.

WARNING: The first contact listed <u>MUST</u> be the individual who will be receiving Purchase Orders. If the contact list is not set up correctly, use the up/down arrows in the Sort column.

NOTE:
- All contacts should be maintained in the HQ PCN.
- Contacts cannot be removed or deleted. If a contact no longer works for the supplier, please contact Stant immediately.

3.2.2.1   Add a Contact

To add a supplier contact, complete the following:

1. From the Supplier Portal menu node, click the Supplier Self-Service menu node.

2. Click the Contacts menu node.

3. To add a contact, click the Add link on the action bar.

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4. Complete the required fields:

• First Name • Last Name • Title • Email • Mobile • Work Phone • After hours contact (Optional)	

5. After the fields are complete, click the OK button .

3.2.2.2   Edit a Contact

To edit a contact, complete the following:

1. Click the Supplier Contact menu node.

2. Click the Search button.

3. In the results grid, click the link of the contact to be edited.

4. Make the necessary edits to the contact record and click the OK button .

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3.2.3   Supplier Portal – Quality

The Supplier Portal – Quality menu node allows users to uploading PAPP packages, respond to VMIRs, download scorecards, and upload certifications. After login, additional IATF instructions will be sent to the main Supplier contact.
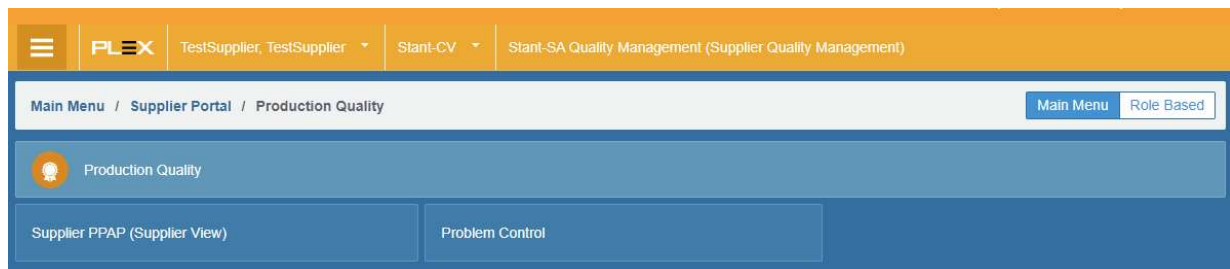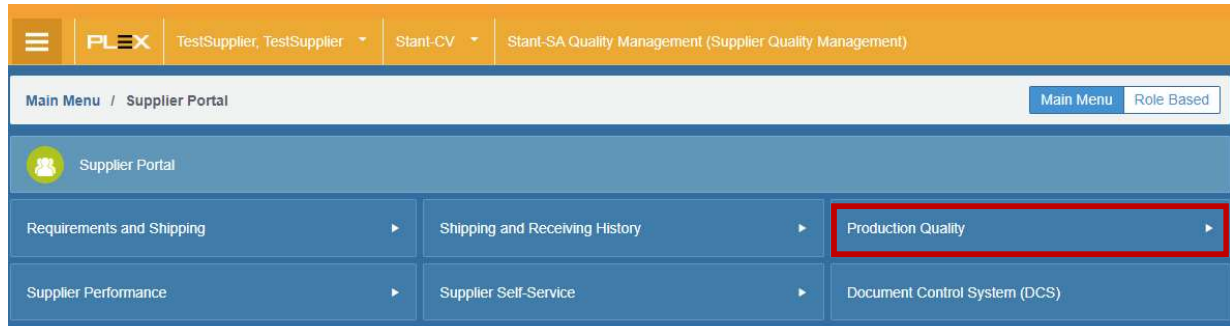
4. Definitions

Term / Abbreviation	Description

5. Approvals

Version	Approver	Title	Approval date
1	Lisa Hagerty	BPO, Purchasing	8/29/2022

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