2018

Auto-Coding System User Manual

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Auto-Coding System

User Manual

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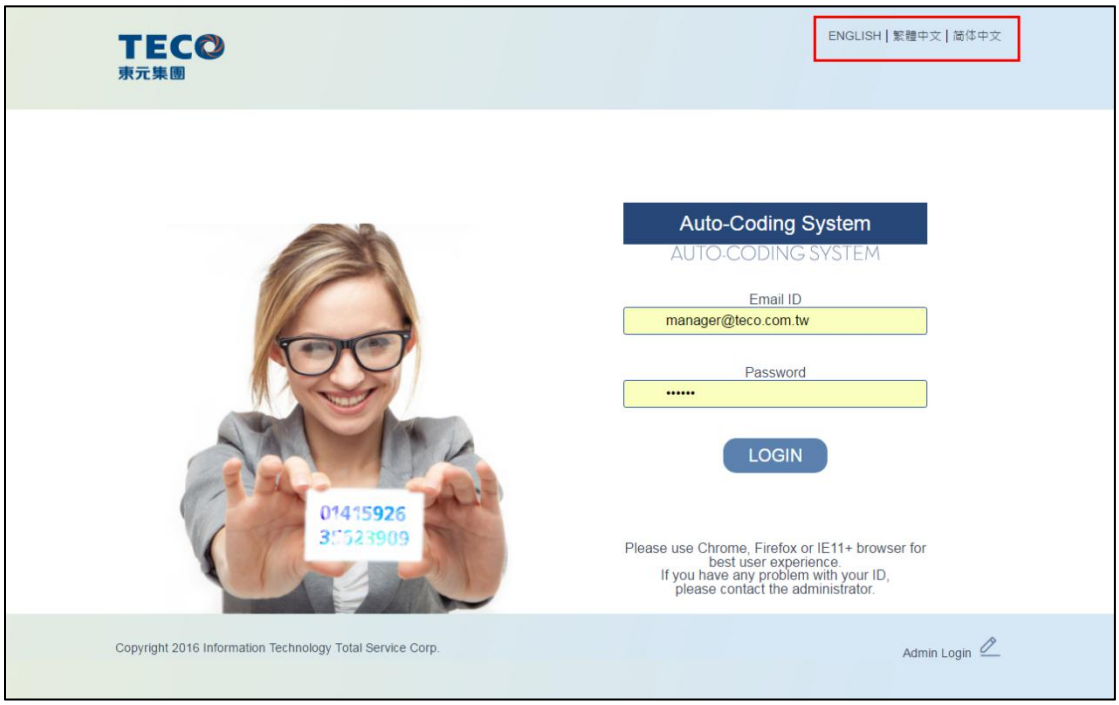
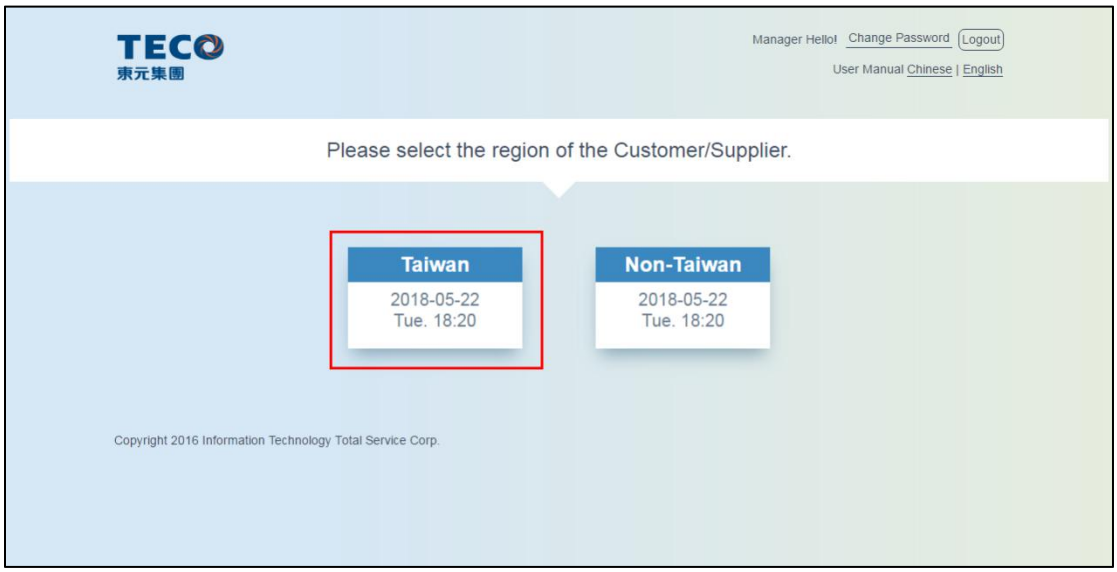
I. Customer/Suppliers of Taiwan

1. Search for a Customer/Supplier

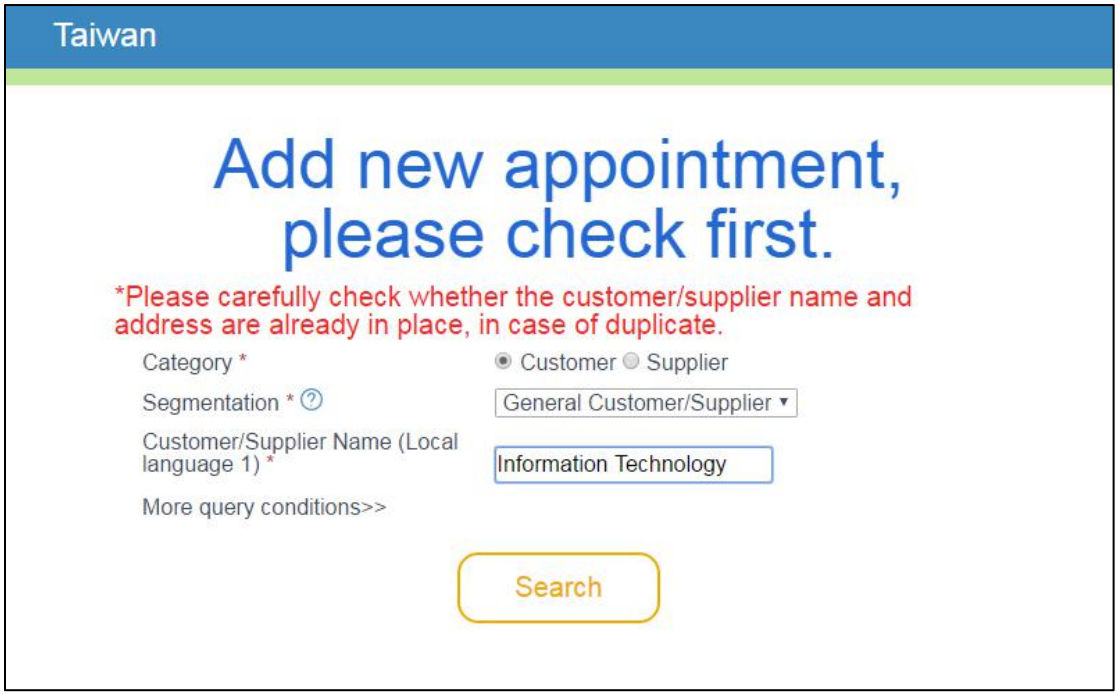
1). Set system language on the login page, and login with your Email ID and Password



2). Select “Taiwan”

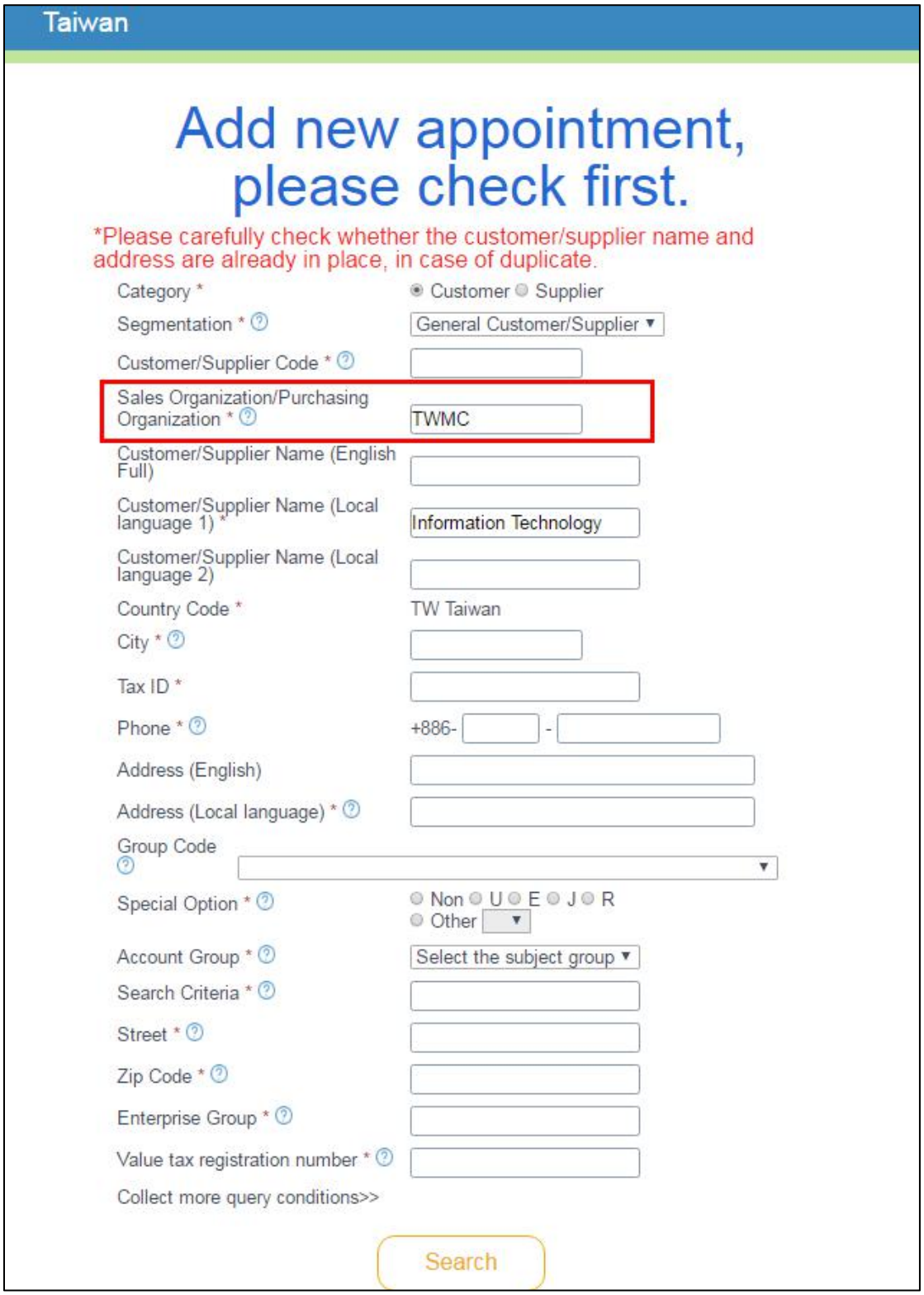


3). Select Category,Segmentation , Customer/Supplier Name(Local Language 1) of your search target.

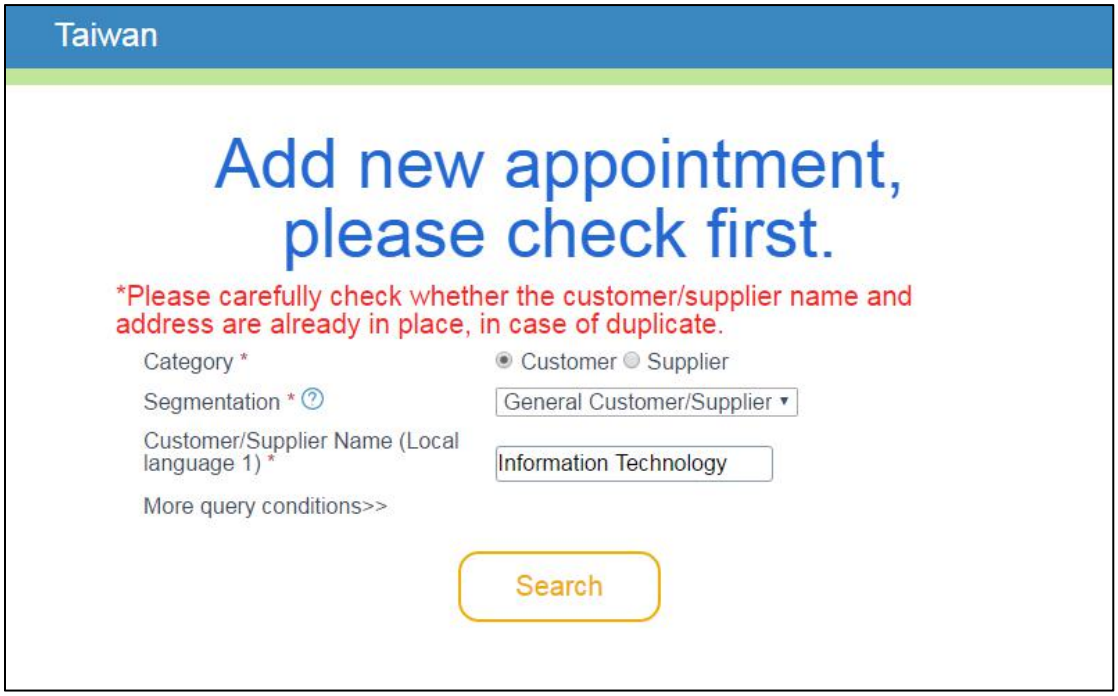


4).Click “more query conditions >>”, and other search criteria can be selected (multiple optional)

- Here we use “Sales Organization/Purchasing Organization” field as example.



5). Click “Collect more query conditions>>”, and the other query terms will be collected except the Category, Segmentation and Customer/Supplier Name(Local Language1).



6). Click “Search”

◆ Result

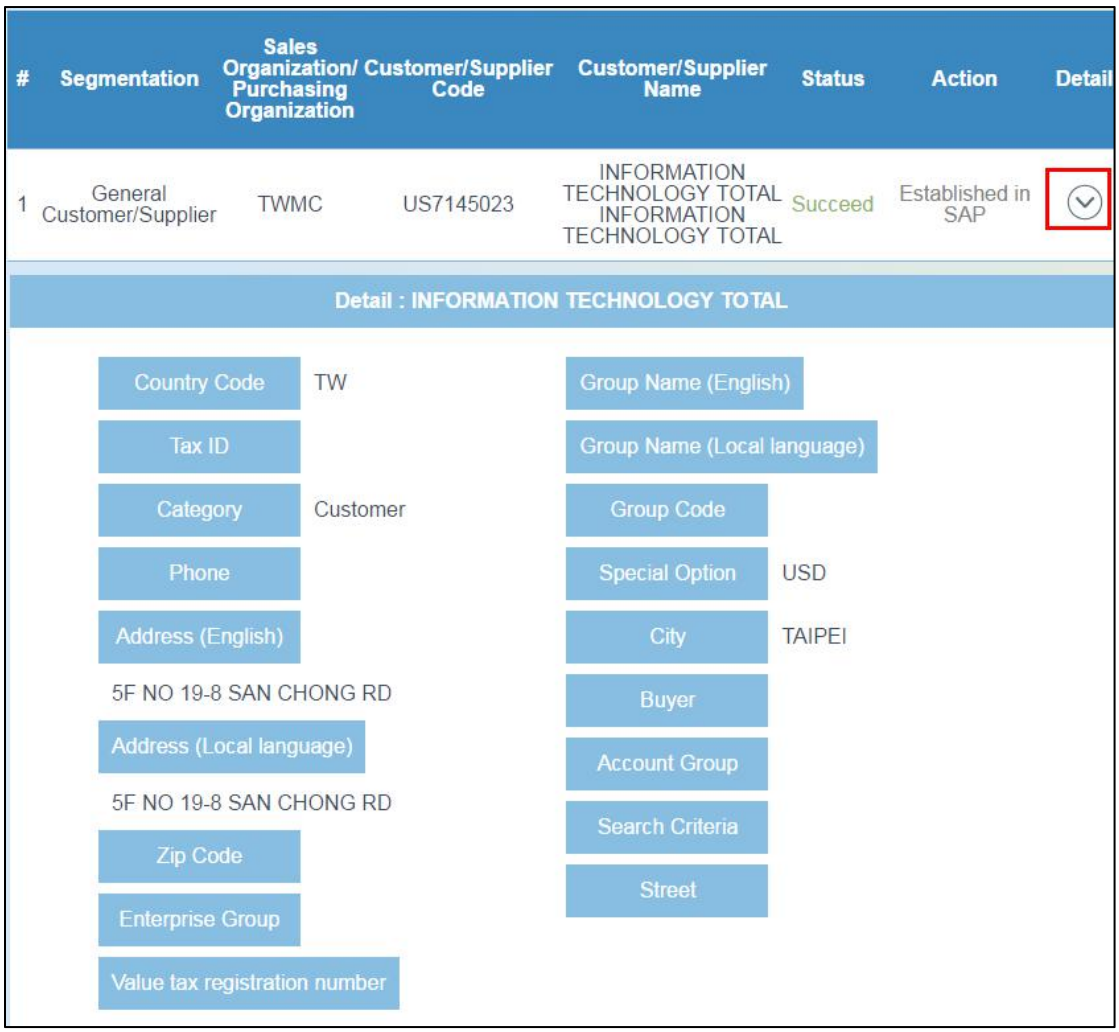
Please carefully compare customer/supplier information, make sure no repeat.

#	Segmentation	Sales Organization/ Purchasing Organization	Customer/Supplier Code	Customer/Supplier Name	Status	Action	Detail
1	General Customer/Supplier	TWMC	US7145023	INFORMATION TECHNOLOGY TOTAL INFORMATION TECHNOLOGY TOTAL	Succeed	Established in SAP	
2	General Customer/Supplier	TWMC	D23929058	INFORMATION TECHNOLOGY INFORMATION TECHNOLOGY	Succeed	Established in SAP	

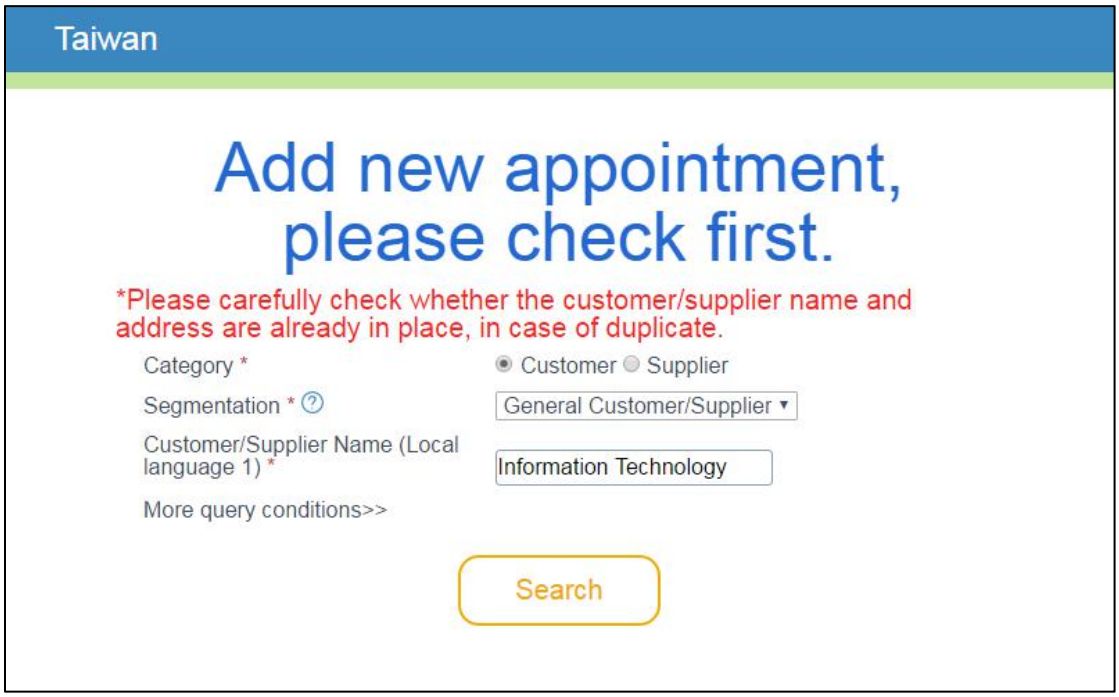
◆ If data is not available

No result has been found. Please apply for a new number if needed.

7). Click the arrow on the right could unfold the detail of the data

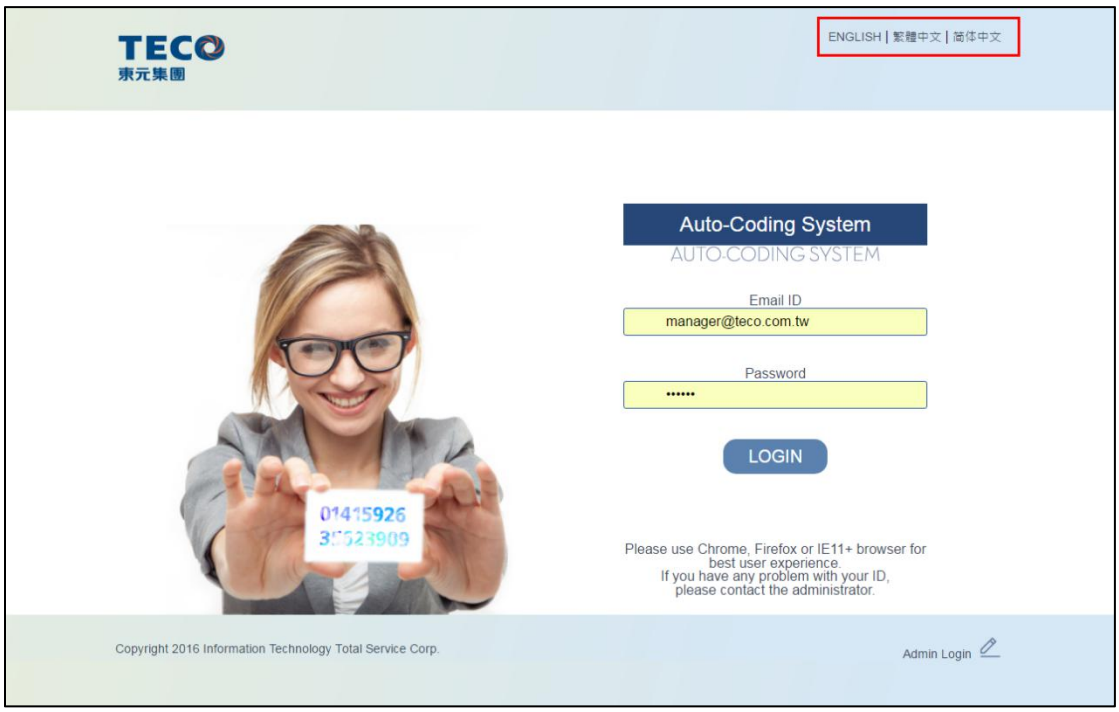


8). Click “Search”, return to query interface.



2. Request for a New Customer/Supplier Code

1). Set system language on the login page, and login with your Email ID and Password

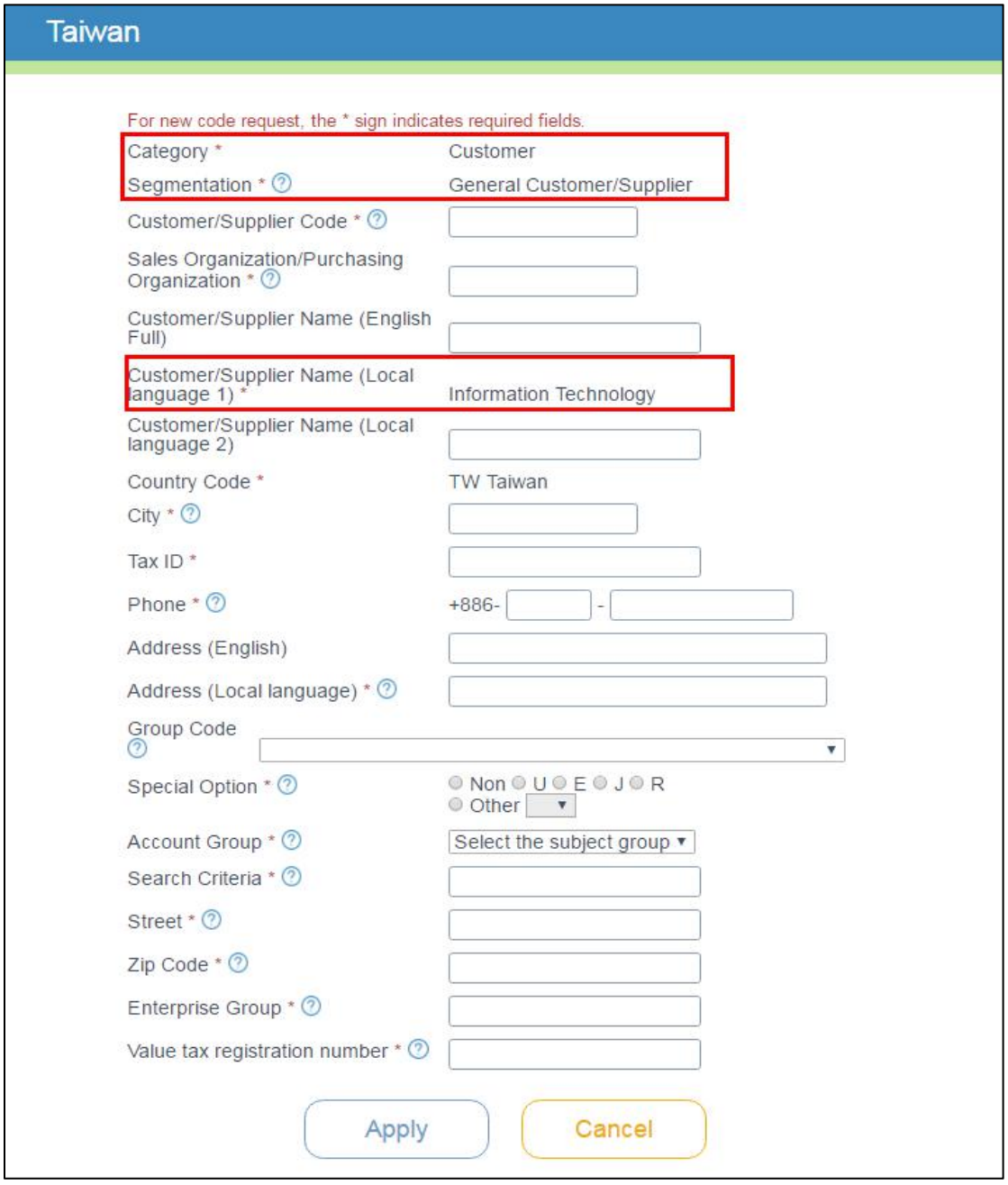


2) . Select “Taiwan”

3). On the Taiwan page, after checking and confirming that the customer/supplier has not duplicated, Check the "No duplicate Customer/Supplier has been confirmed" and click "Apply" to enter the new appointment screen.

At this point, the Category, Segmentation and Customer/Supplier Name(Local language 1) that is filled in on the query interface cannot be modified.

- **Notice that the red asterisk (*) indicates required inputs for application. Inputs without '*' are optional.**



Move the cursor to the question mark and the instruction will be appeared.

4). Below list instructions for each required inputs:

A. ［Category］

Please choose whether the category is "Customer" or "Supplier". Single answer.

B. ［Segmentation］

Please choose whether the segmentation is "General Customer/Supplier", "Customer for Delivery", "Customer for Service", or "Personal Expense." Single answer.

C. ［Customer/Supplier Code］

a. For General Customer/Supplier, please fill the tax ID.
b. For Personal Expense, please fill the complete Personal ID number
c. For other segmentations—that is, Customer for Delivery or Customer for Service—please fill custom 8-digit number. Only uppercase letters and numbers are accepted.
   - ◆ Please note that the “D”, “E”, “S” at beginning will be added automatically, therefore don’t you need to fill.

D. ［Sales Organization / Purchasing Organization］

It has to be a 4-digit number. Only uppercase letters and numbers are accepted.

E. ［Customer/Supplier Name (Local language 1)］

Please fill the Customer/Supplier Name in its local language. If local language is inconvenient for you, please fill in English.

F. ［City］

Please fill the city. No more than 40 characters.

G. ［Tax ID］

Please fill only with numbers.

H. ［Phone］

Please fill out by following rule:
"+Country Code-Region Code-Your Number", e.g. "+886-2-12345678".
For mobile phone numbers, please fill as "+ Country Code -9X-X Your Number ", for example "+886-91-2345678".
Both Region Code and Your Number are required. If any extension, use # before extension number.

I.［Address (Local Language)］

Please fill the address in its local language. If local language is inconvenient for you, please fill in English.

J. ［Special Option］

If no specific need, choose "Non". If specific currency, choose U(USD), E(EUR), J(JPY), R(RMB), or the "Other" option to fit with your need.

K. ［Buyer］

Please fill the Buyer. No more than 10 characters.

L. ［Account Group］

Please choose the Account Group, if Category is 'customer',please choose '0001Buyer' or '0002Receiver' ;if Category is 'supplier',please choose 'DOMA','DOME','EMPL','FORN' or 'OTHE'

M. ［Search Criteria］

Please fill the Search Criteria. No more than 20 characters.

N. ［Street］

Please fill the Street. No more than 60 characters.

O. ［Zip Code］

Please fill the Zip Code. No more than 10 characters.

P. ［Enterprise Group］

Please fill the Enterprise Group. No more than 10 characters.

Q. ［Value tax registration number ］

Please fill the Value tax registration number . No more than 20 characters.

- **Instruction of Optional Inputs**

A. [Customer/Supplier Name(English Full)]

Please fill the Customer/Supplier Name(English Full). If no, do not fill in.

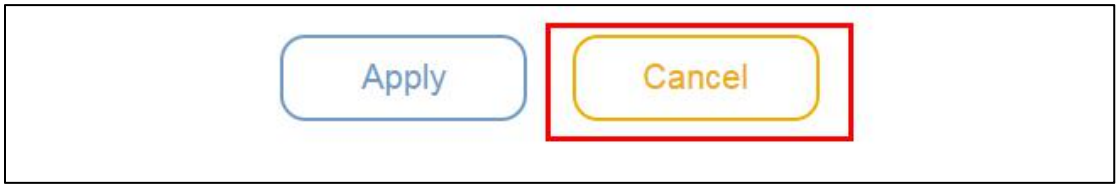
B. [Address(English)]

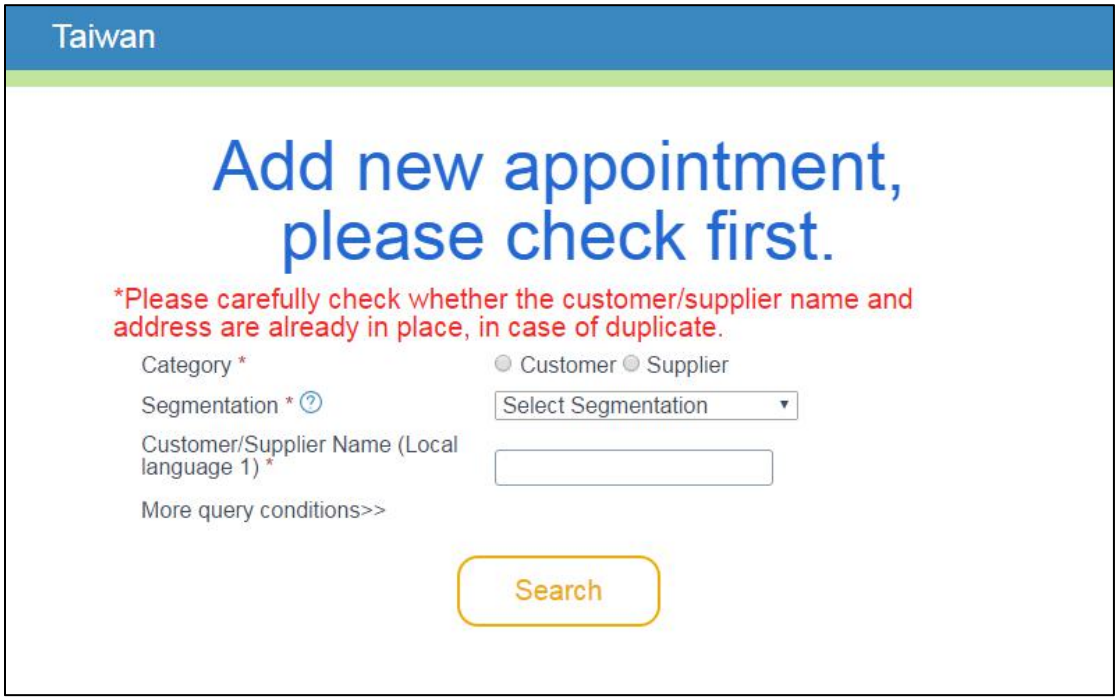
Please fill the Address(English). If no, do not fill in.

C. ［Group Code］

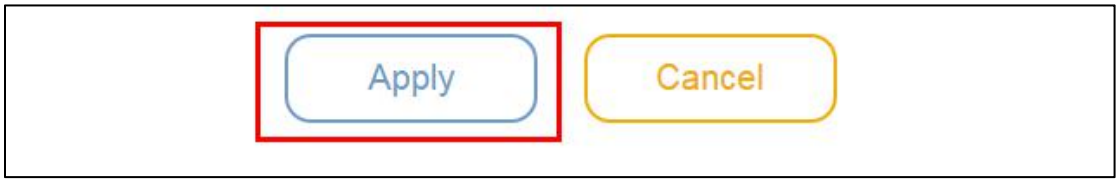
Please select the group code. If it does not exist , Please leave it blank or choose non.

5). Click “Cancel” to return the initial query interface.



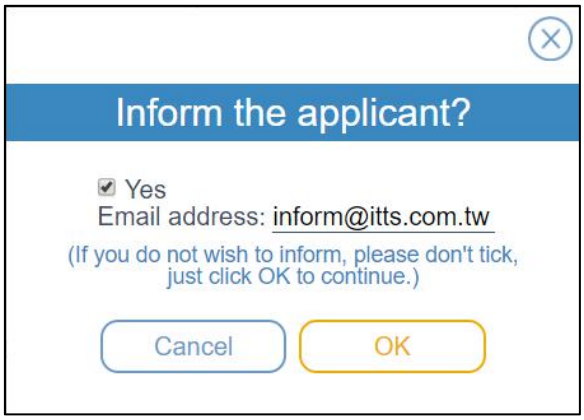


6). Click “Apply”



7). Choose whether to inform the applicant

- If yes, tick the checkbox and fill in her/his email.

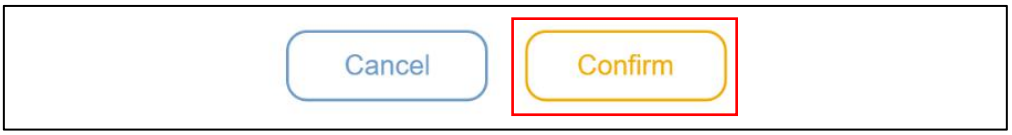


8). Click “OK”

9). Confirm your information again

➢ If you wish to modify, click “Cancel” for heading to the previous page to edit.

10). Click “Confirm”



11). Application succeeded

- If you choose to inform the applicant, the inform letter will be sent at this time.

Application Succeeded

Customer/Supplier Code	D11224455
Region	Taiwan
Category	Customer
Segmentation	General Customer/Supplier
Sales Organization/Purchasing Organization	TWMC
Customer/Supplier Name (English Full)	
Customer/Supplier Name (Local language 1)	Information Technology
Customer/Supplier Name (Local language 2)	
Country Code	TW
City	TaiPei
Tax ID	11224455
Phone	+886-1111-12345678
Address (English)	
Address (Local language)	Gigg Lane , BURY
Group Code	
Group Name (English)	
Group Name (Local language)	
Special Option	
Notification Object	infor@itts.com.tw
Buyer	D11224455
Account Group	0001
Search Criteria	11224455
Street	Gigg Lane , BURY
Zip Code	123
Enterprise Group	TWMC
Value tax registration number	11224455

12). Established in SAP , follow the steps below:

A. Search for the Customer/Supplier you applied. (See chapter I.1 if you need instruction)

B. Click the “Established in SAP” button.

#	Segmentation	Sales Organization/ Purchasing Organization	Customer/Supplier Code	Customer/Supplier Name	Status	Action	Detail
1	General Customer/Supplier	TWMC	D11224455	INFORMATION TECHNOLOGY INFORMATION TECHNOLOGY	Reserved	Established in SAP	

C. On click, the status will become “Succeed”, meaning that the code has been established in SAP, and the application process is done.

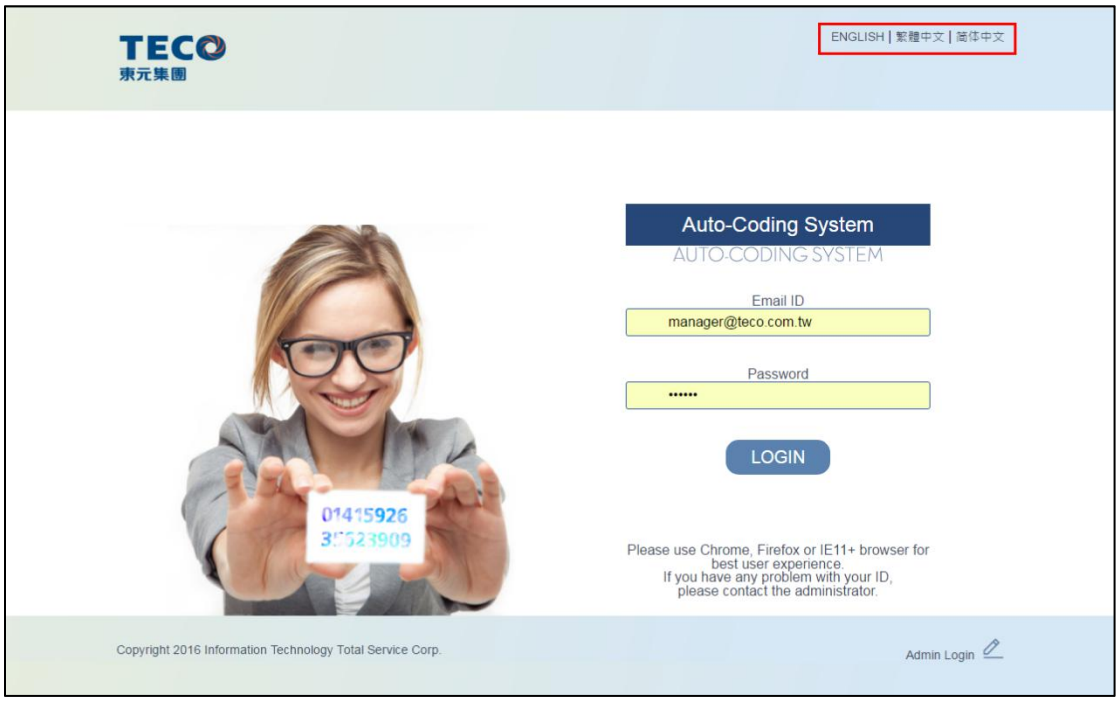
#	Segmentation	Sales Organization/ Purchasing Organization	Customer/Supplier Code	Customer/Supplier Name	Status	Action	Detail
1	General Customer/Supplier	TWMC	D11224455	INFORMATION TECHNOLOGY INFORMATION TECHNOLOGY	Succeed	Established in SAP	

13). Finish

II. Customer/Suppliers of Non-Taiwan

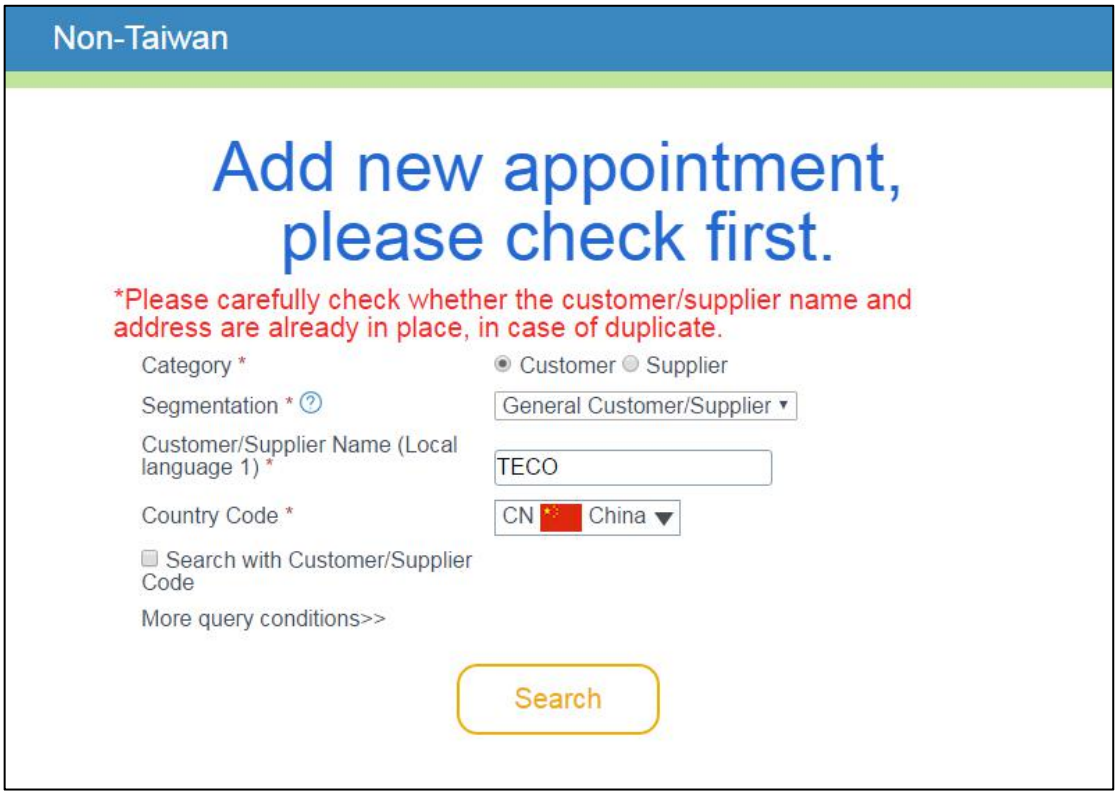
1. Search for a Customer/Supplier

1). Set system language on the login page, and login with your Email ID and Password



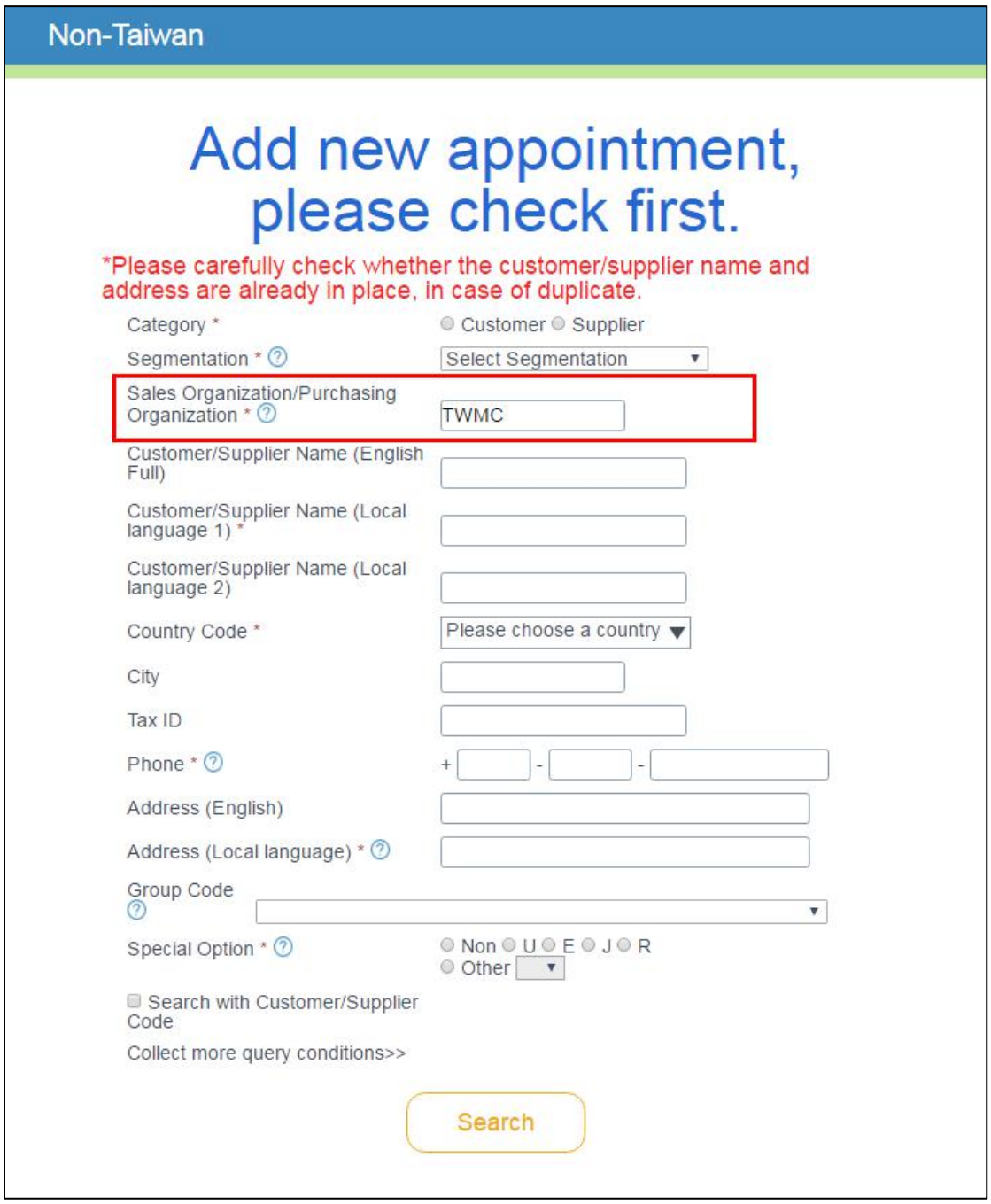
2). Select “Non-Taiwan”

3). Select Category,Segmentation , Customer/Supplier Name(Local Language 1) and Country Code of your search target.

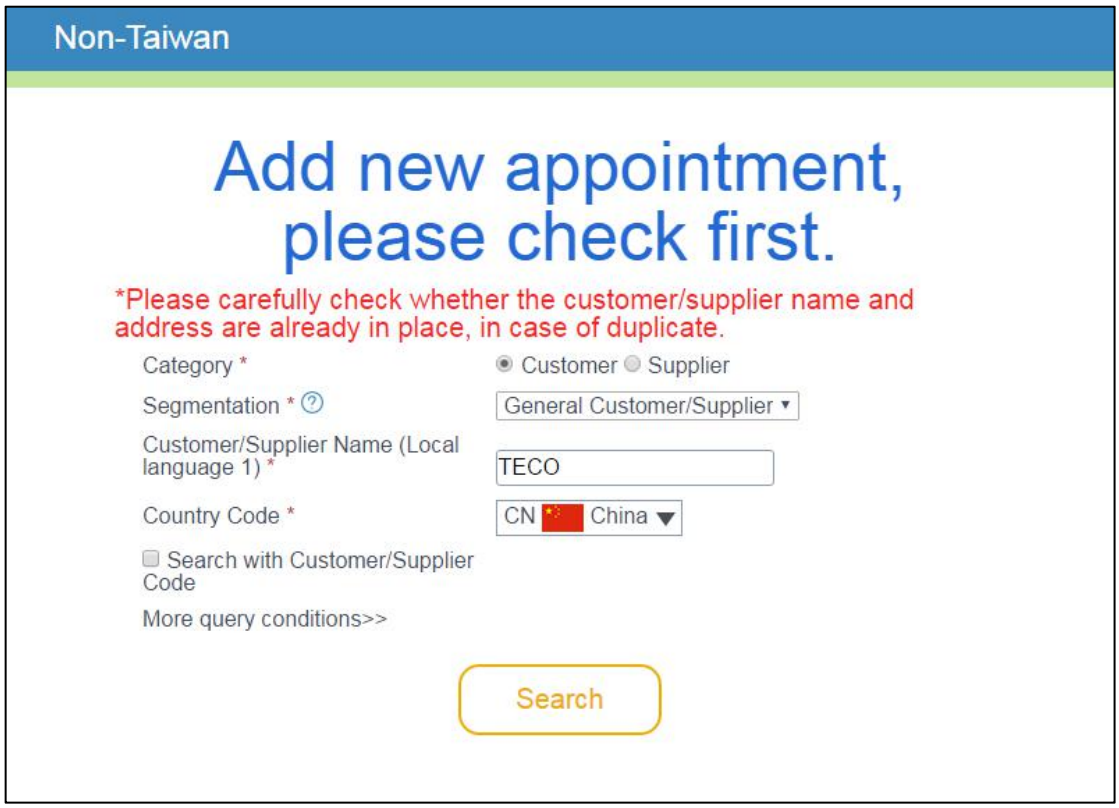


4). Click “more query condition >>”, and other search criteria can be selected (multiple optional)

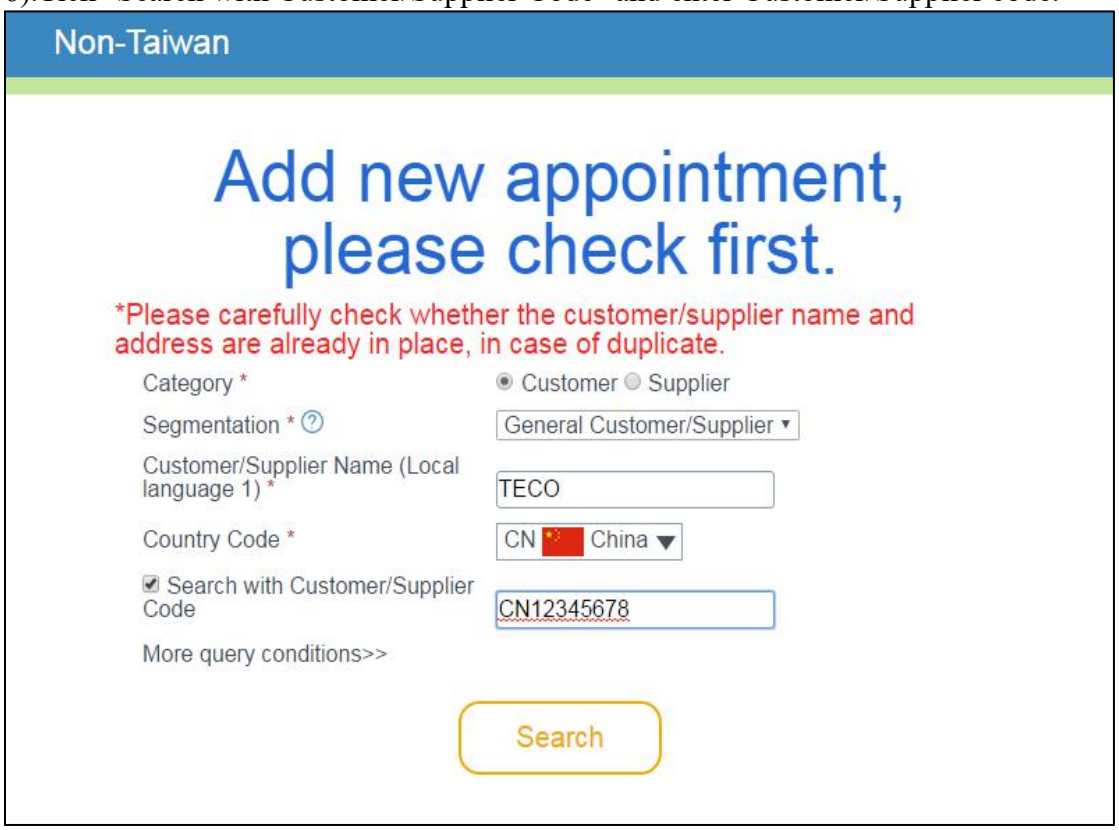
- Here we use “Sales Organization/Purchasing Organization” field as example.



5). Click “Collect more query conditions >>”, and the other query terms will be collected except the Category, Segmentation , Customer/Supplier Name(Local Language1).



6).Tick "Search with Customer/Supplier Code" and enter Customer/Supplier code.

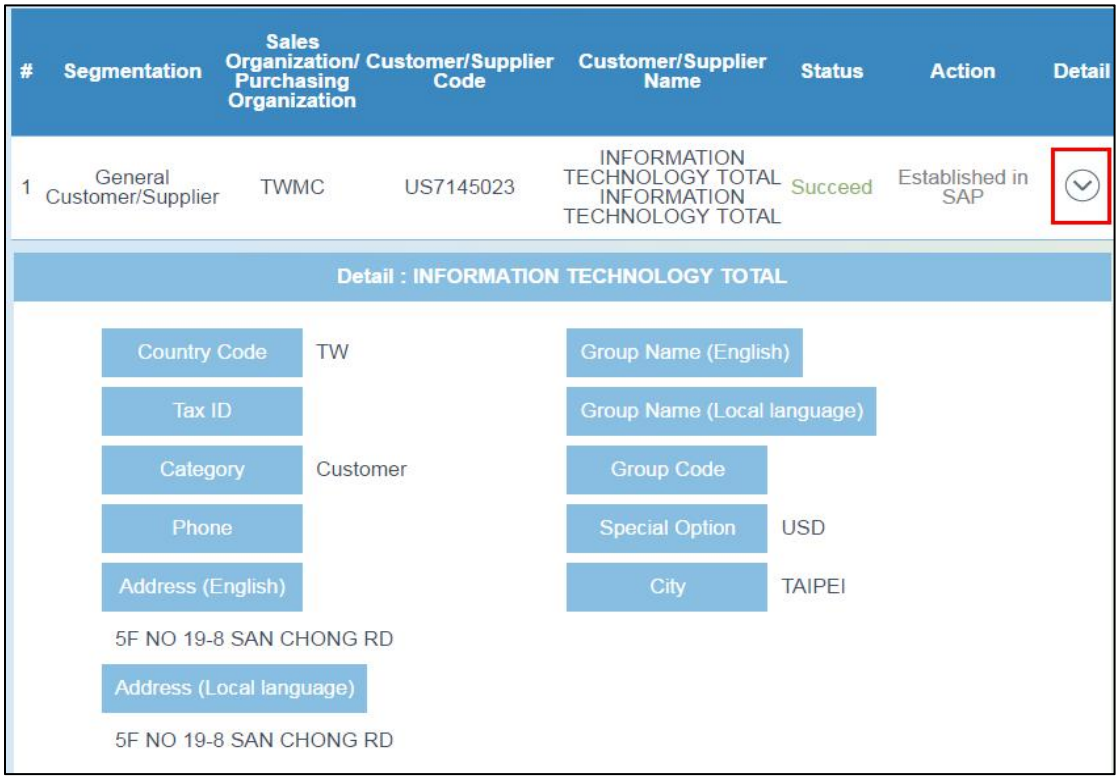


7). Click “Search”

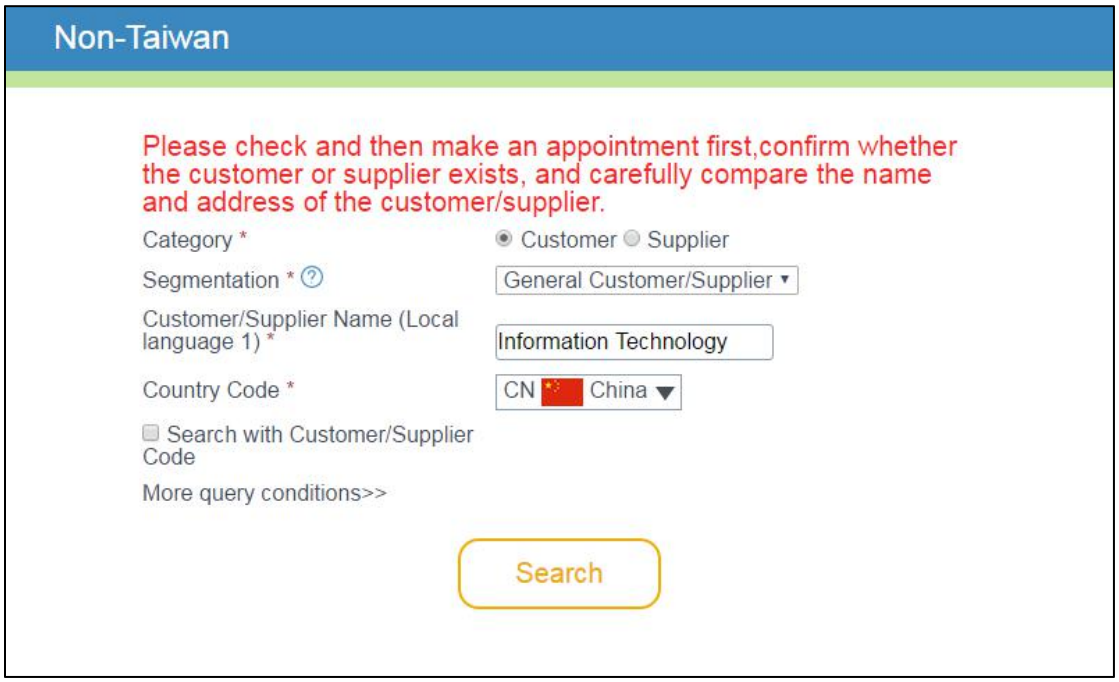
◆ Result

◆ If data not found

8). Click the arrow on the right could unfold the detail of the data

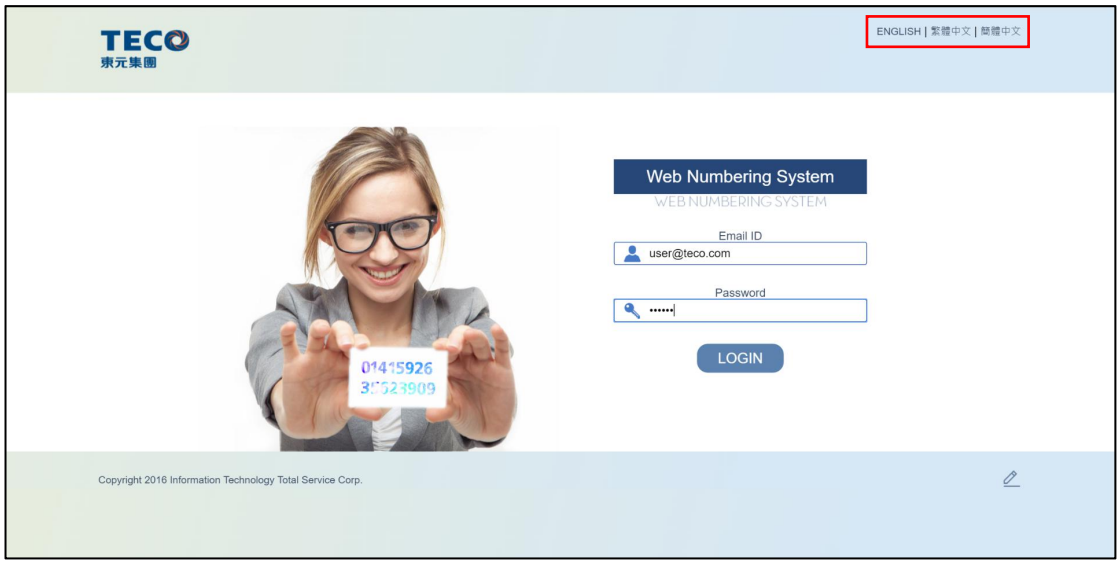


9).Click “Search”, return to query interface.



2. Request for a New Customer/Supplier Code

1). Set system language on the login page, and login with your Email ID and Password

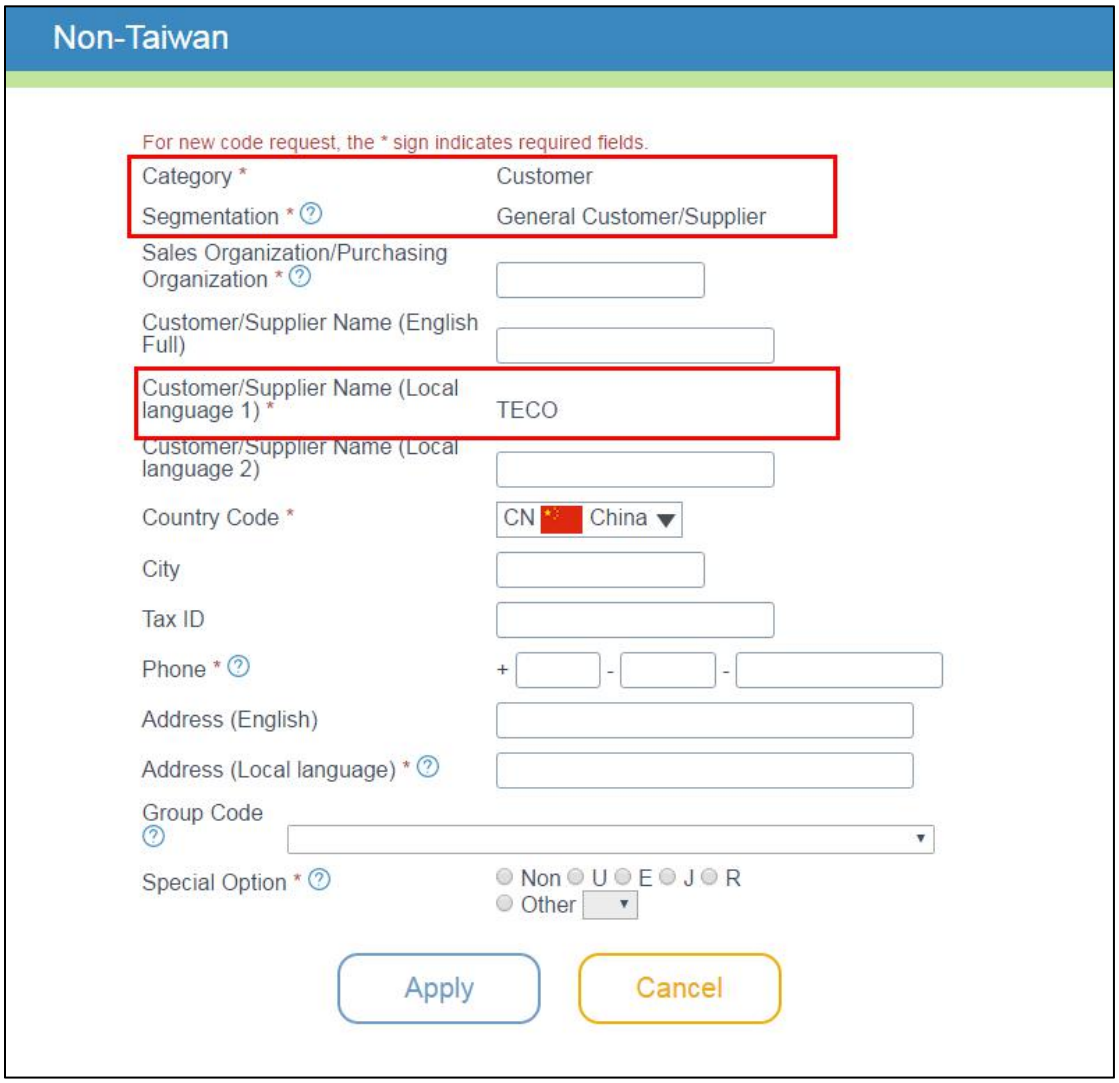


2). Select “Non-Taiwan”

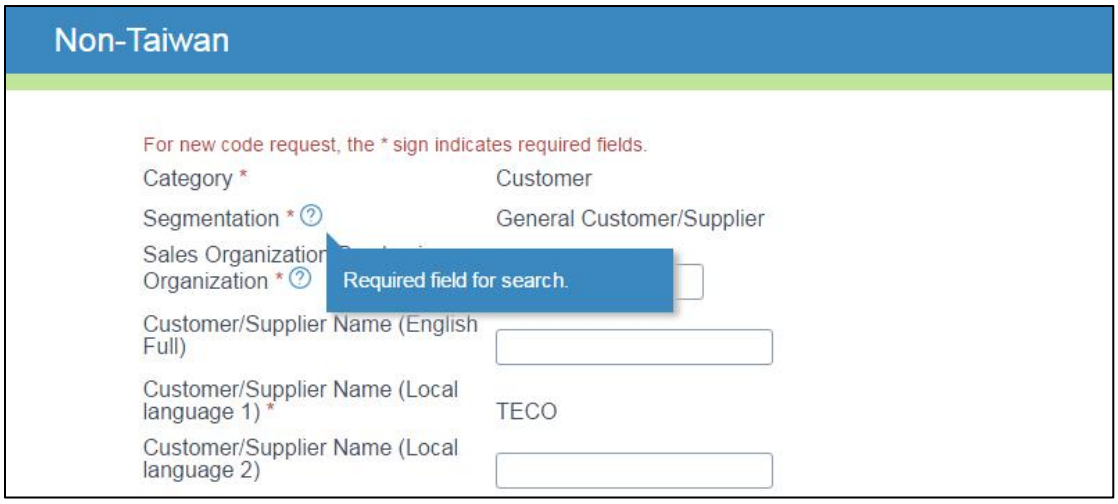
3). On the Non-Taiwan page, after checking and confirming that the customer/supplier has not duplicated, Check the "No duplicate Customer/Supplier has been confirmed" and click "Apply" to enter the new appointment screen.

At this point, the Category, Segmentation and Customer/Supplier Name(Local language 1) that is filled in on the query interface cannot be modified.

- **Notice that the red asterisk (*) indicates required inputs for application. Inputs without '*' are optional.**



Move the cursor to the question mark and the instruction will be appeared.



4). Below list instructions for each required inputs:

A. ［Category］
Please choose whether the category is "Customer" or "Supplier". Single answer.

B. ［Segmentation］
Please choose whether the segmentation is "General Customer/Supplier", "Customer for Delivery", "Customer for Service", "Public Expense" or "Personal Expense." Single answer.

C. ［Sales Organization / Purchasing Organization］
It has to be a 4-digit number. Only uppercase letters and numbers are accepted.

D. ［Customer/Supplier Name(Local language 1)］
Please fill the Customer/Supplier Name in its local language. If local language is inconvenient for you, please fill in English.

E. ［Country Code］
Please choose your country code

F. ［Phone］
Please fill by following rule: "+Country Code-Region Code-Your Number", e.g. "+886-2-12345678" or "+1-404-1234567". If any extension, use # before extension number.

G. ［Address (Local Language)］

Please fill the address in its local language. If local language is inconvenient for you, please fill in English.

H. ［Special Option］

If no specific need, choose "Non". If specific currency, choose U(USD), E(EUR), J(JPY), R(RMB), or the "Other" option to fit with your need.

I. ［Customer/Supplier Code］(For affiliates in China only)

- **Required for Public Expense and Personal Expense only.**
  1). For Public Expense, please consult with the Taiwan Financial Department to get a 7-digit code.
  2). For Personal Expense, please follow the code recommended by the system.

- **Instruction of Optional Inputs**

A. ［Customer/Supplier Name(English Full)］

Please fill the Customer/Supplier Name(English Full). If no, do not fill in.

B. ［Customer/Supplier Name(Local language 2)］

Please fill the Customer/Supplier Name(Local language 2). If no, do not fill in.

C. ［City］

Please fill the City. If no, do not fill in.

D. ［Tax ID］

Please fill the Tax ID. If no, do not fill in.

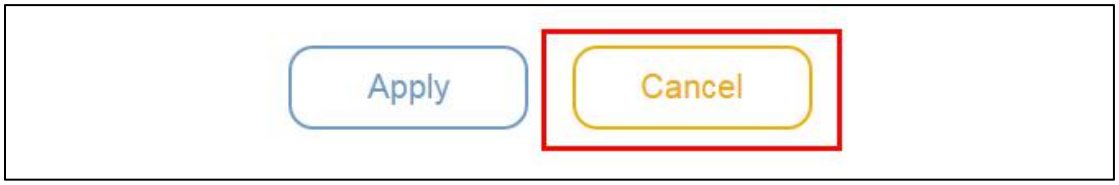
E. ［Address(English)］

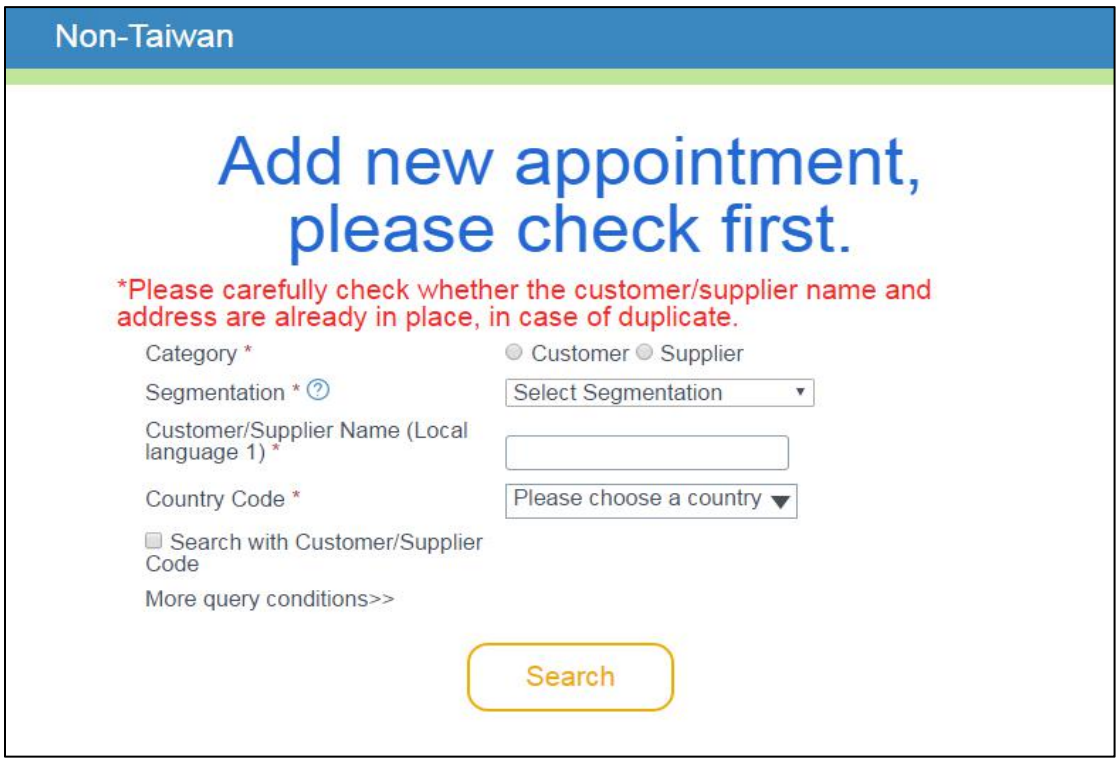
Please fill the Address(English). If no, do not fill in.

F. ［Group Code］

Please select the group code. If it does not exist , Please leave it blank or choose non.

5). Click “Cancel” return to the

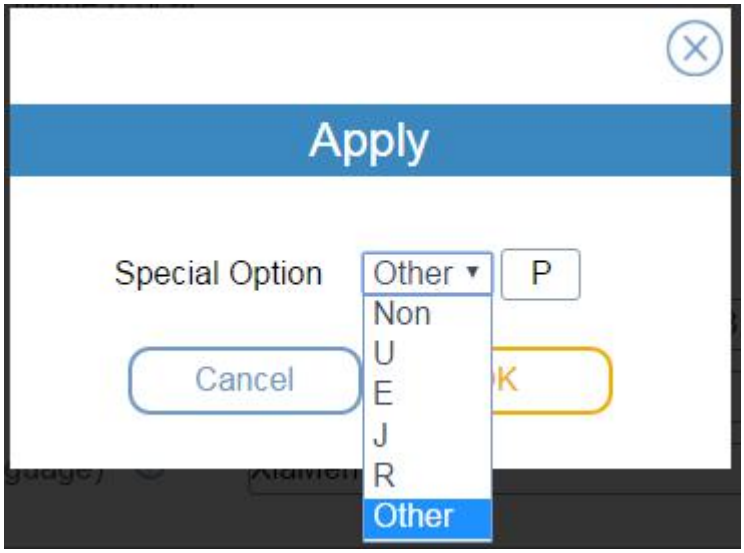




6). Click “Apply”

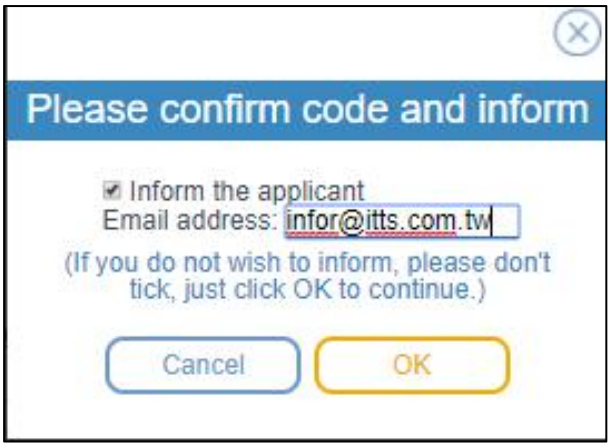
7). Recheck the Special Option and the Serial Number

- If you choose "Other" in Special Option, please fill in one uppercase letter.



8). Confirm the Customer/Supplier Code and whether to inform

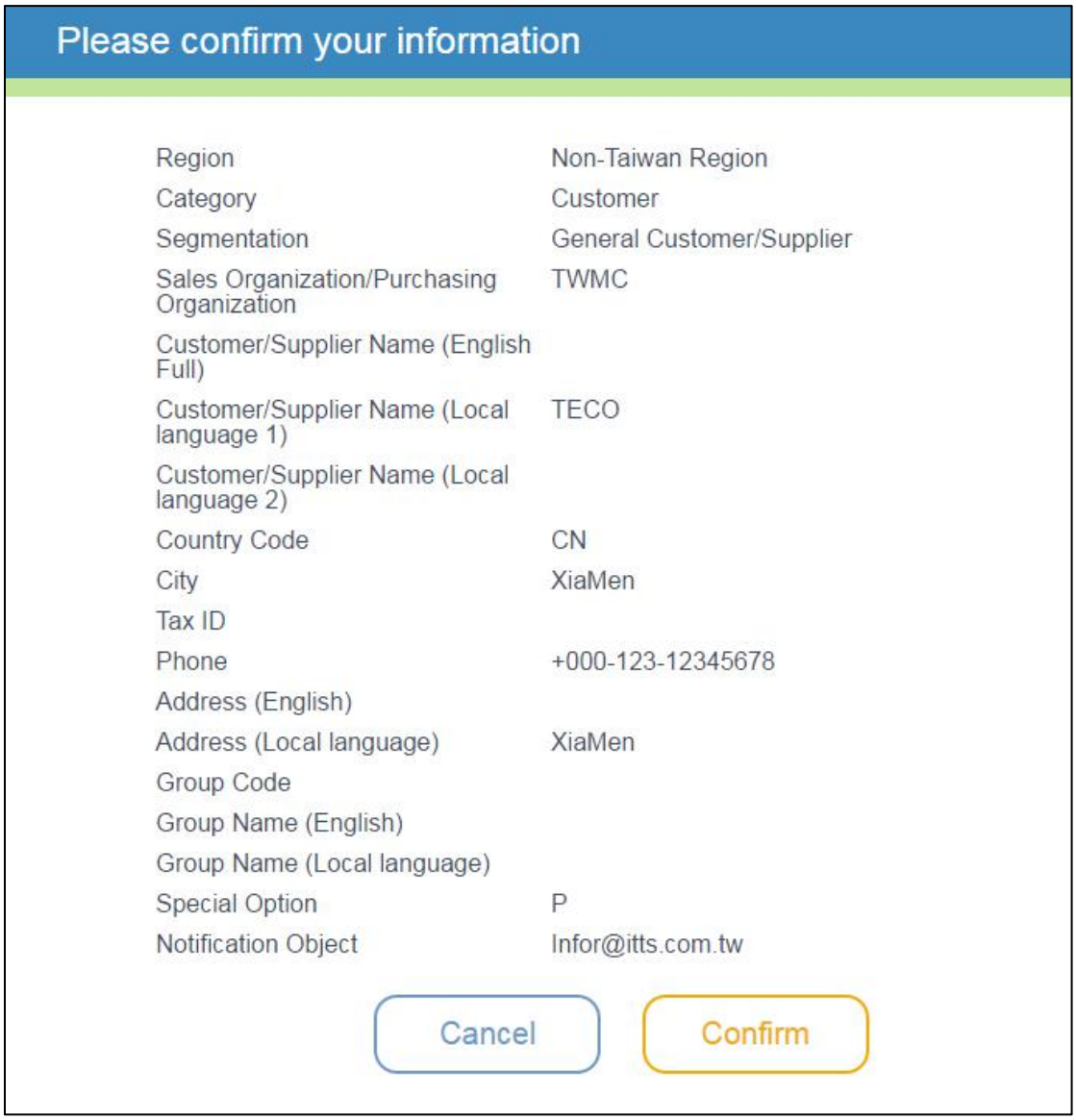
- If yes, check the checkbox and fill her/his Email address.



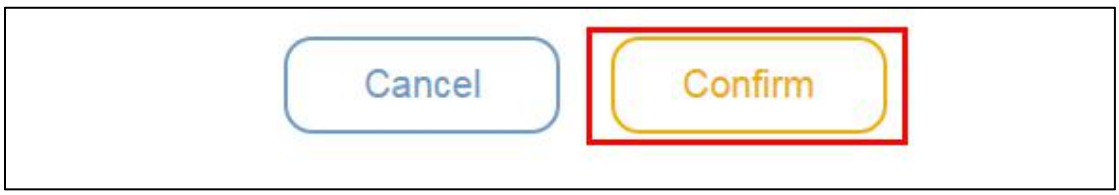
9). Click "OK"

10). Reconfirm your information again.

- If you wish to modify, click “Cancel” for heading to the previous page to edit.



11). If all the information is correct, click “Confirm”



12). Application succeeded.

- If you choose to inform the applicant, the inform letter will be sent at this time.

Application Succeeded

Customer/Supplier Code	CN0001510P
Region	Non-Taiwan Region
Category	Customer
Segmentation	General Customer/Supplier
Sales Organization/Purchasing Organization	TWMC
Customer/Supplier Name (English Full)	
Customer/Supplier Name (Local language 1)	TECO
Customer/Supplier Name (Local language 2)	
Country Code	CN
City	XiaMen
Tax ID	
Phone	+000-123-12345678
Address (English)	
Address (Local language)	XiaMen
Group Code	
Group Name (English)	
Group Name (Local language)	
Special Option	P
Notification Object	Infor@itts.com.tw

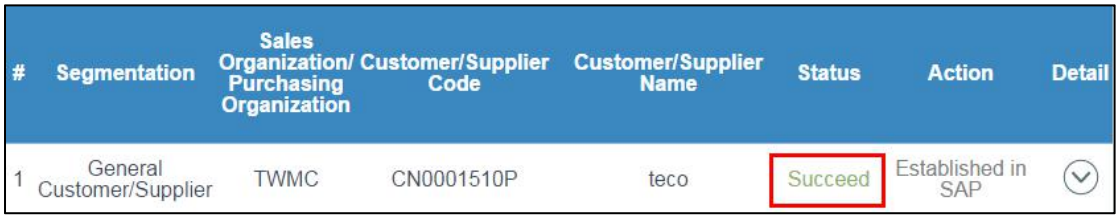
13). After confirming that the code has not only been reserved in this system, but also established in SAP by the requestor, the administrator must finish the process as below.

A. Search for the Customer/Supplier you applied. (See chapter II.1 if you need instruction)

B. Click the “Established in SAP” button.

#	Segmentation	Sales Organization/ Purchasing Organization	Customer/Supplier Code	Customer/Supplier Name	Status	Action	Detail
1	General Customer/Supplier	TWMC	CN0001510P	teco	Reserved	Established in SAP	

C. On click, the status will become “Succeed”, meaning that the code has been established in SAP, and the application process is done.



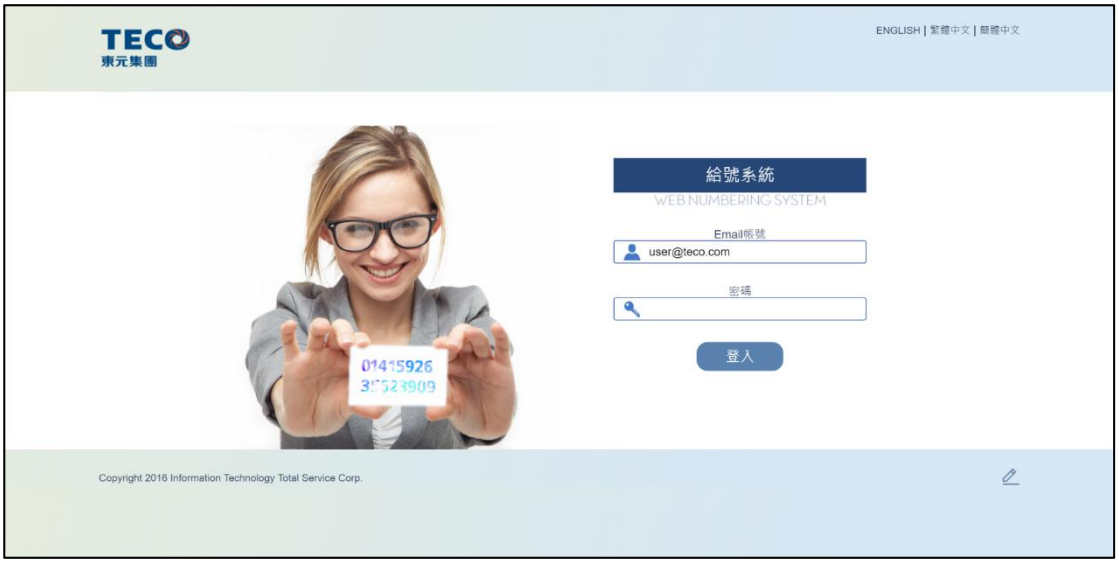
#	Segmentation	Sales Organization/ Purchasing Organization	Customer/Supplier Code	Customer/Supplier Name	Status	Action	Detail
1	General Customer/Supplier	TWMC	CN0001510P	teco	Succeed	Established in SAP	

14). Finish

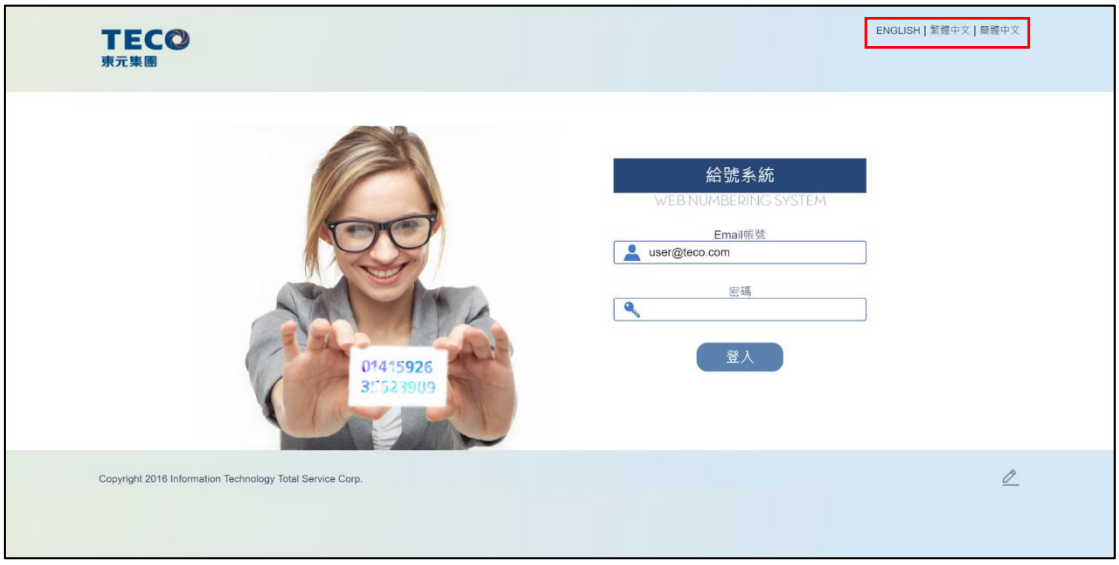
III. Others

1. Set System Language

1). Enter the system

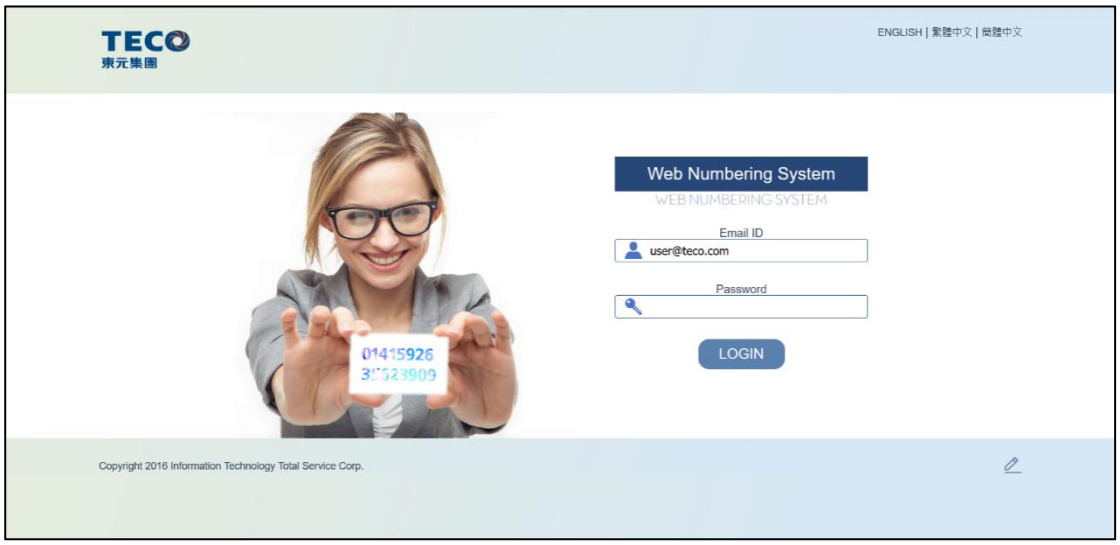


2). On the login page, click language options on the right top



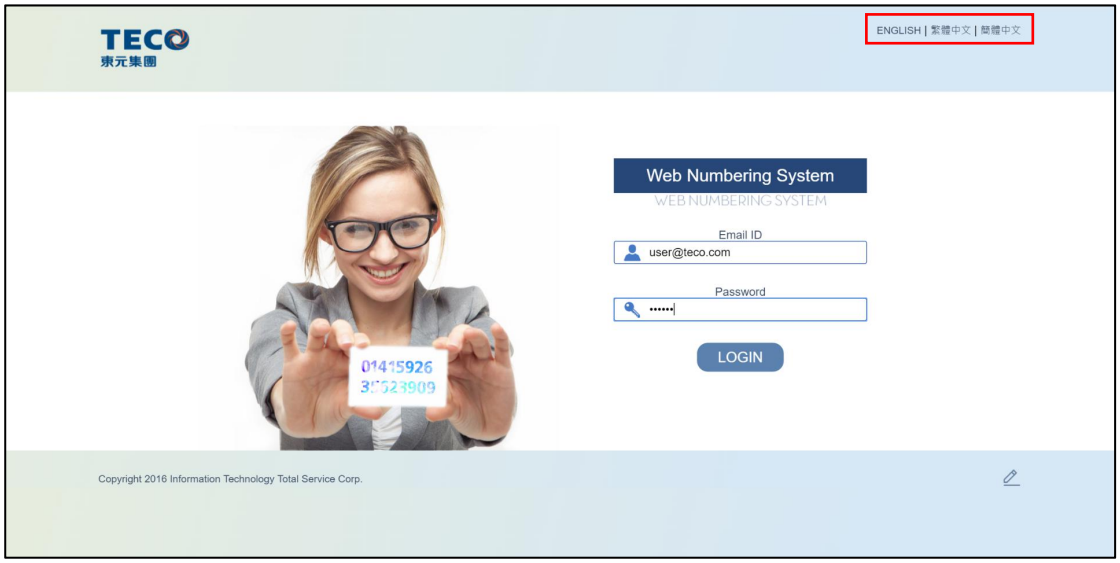
- English, Chinese(Traditional) and Chinese(Simplified) are available

3). Finished

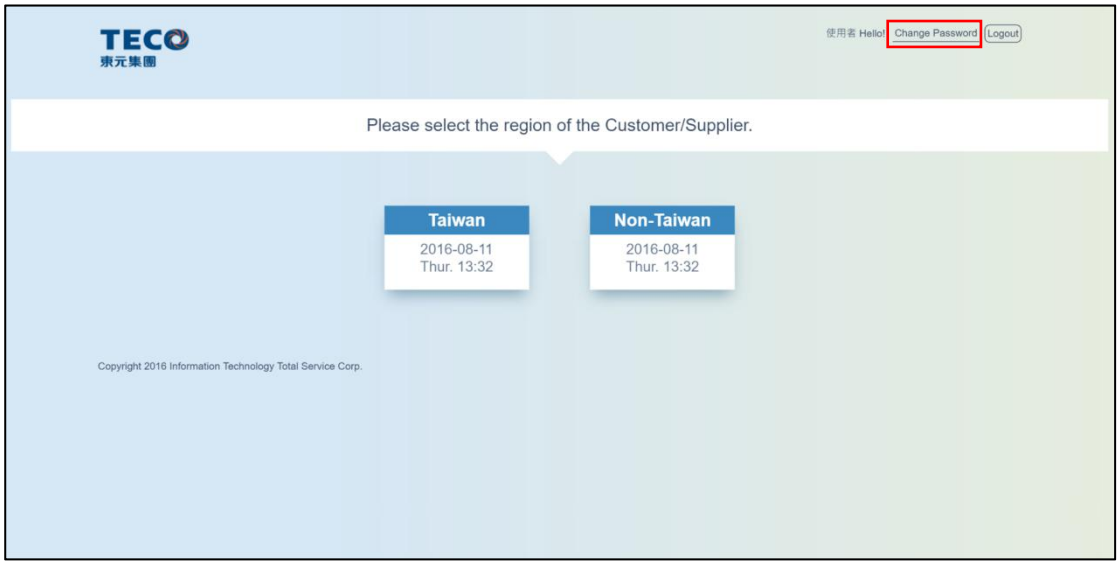


2. Change Password

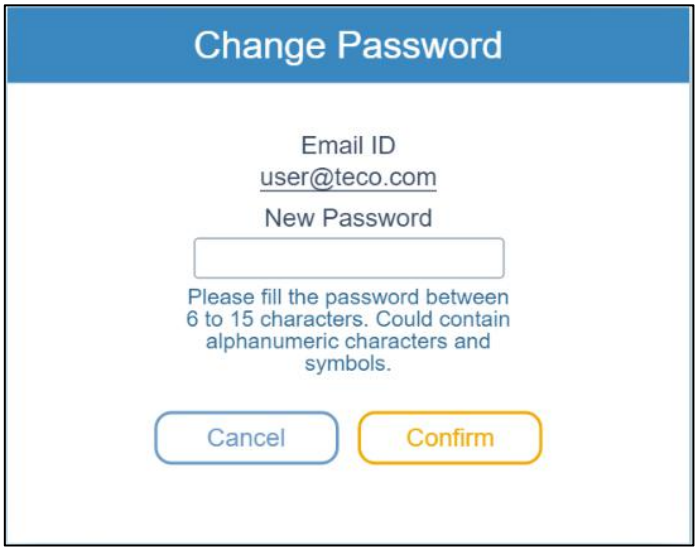
1). Set system language on the login page, and login with your Email ID and Password



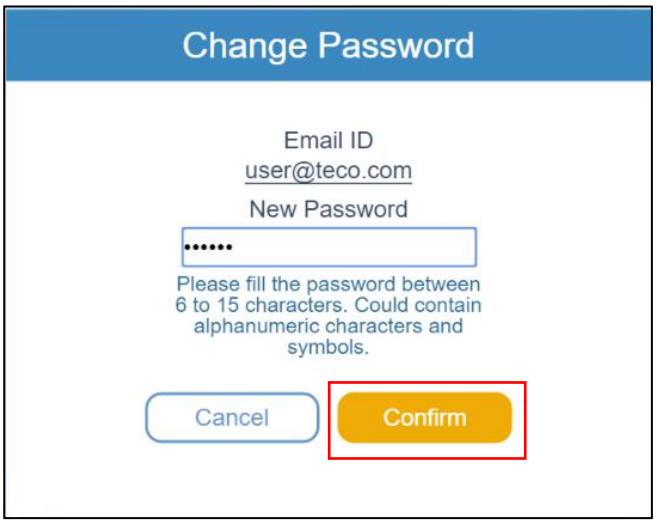
2). Click the “Change Password” on the right top. It’s shown in every page after login.



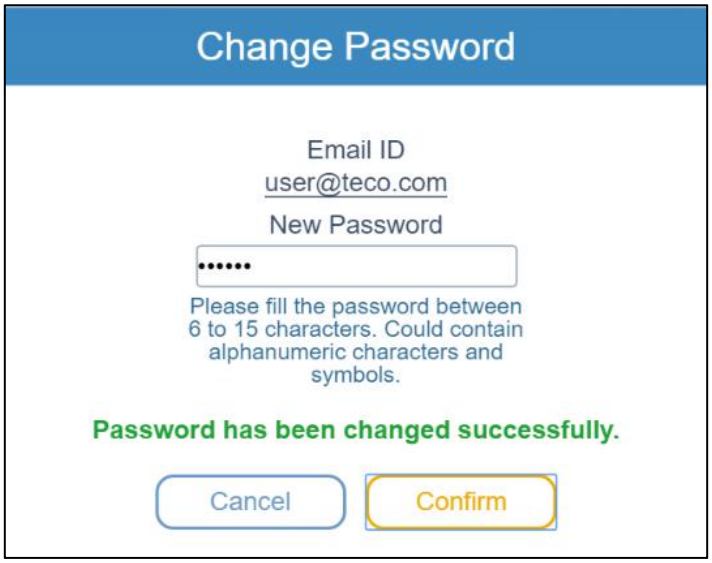
3). Enter the page of Change Password, and enter a 6-15 digit code. Letters, numbers and symbols are allowed.



4). Click “Confirm”

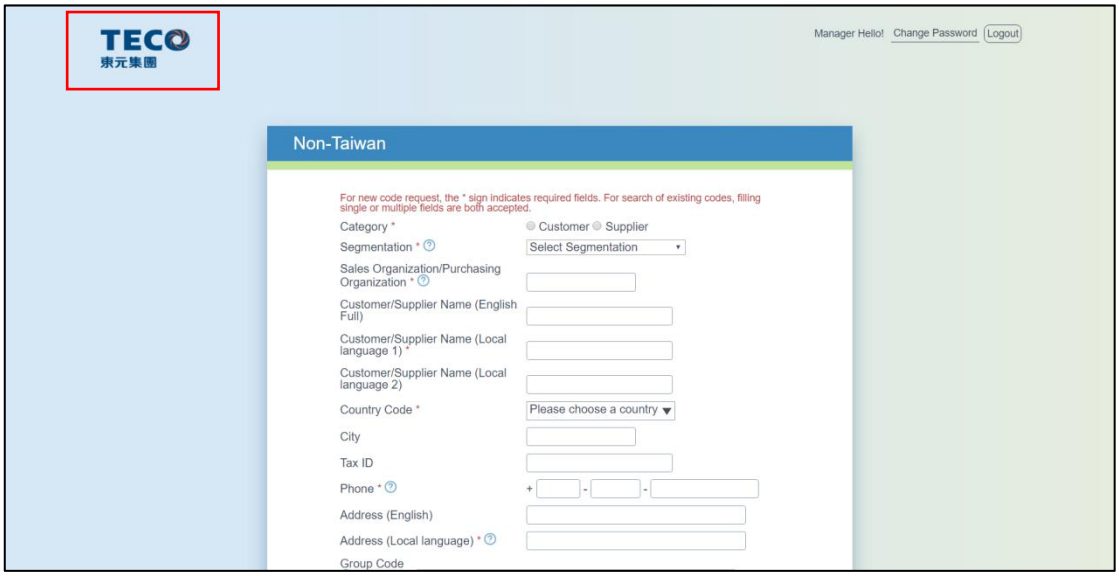


5). Finished with success message showing.

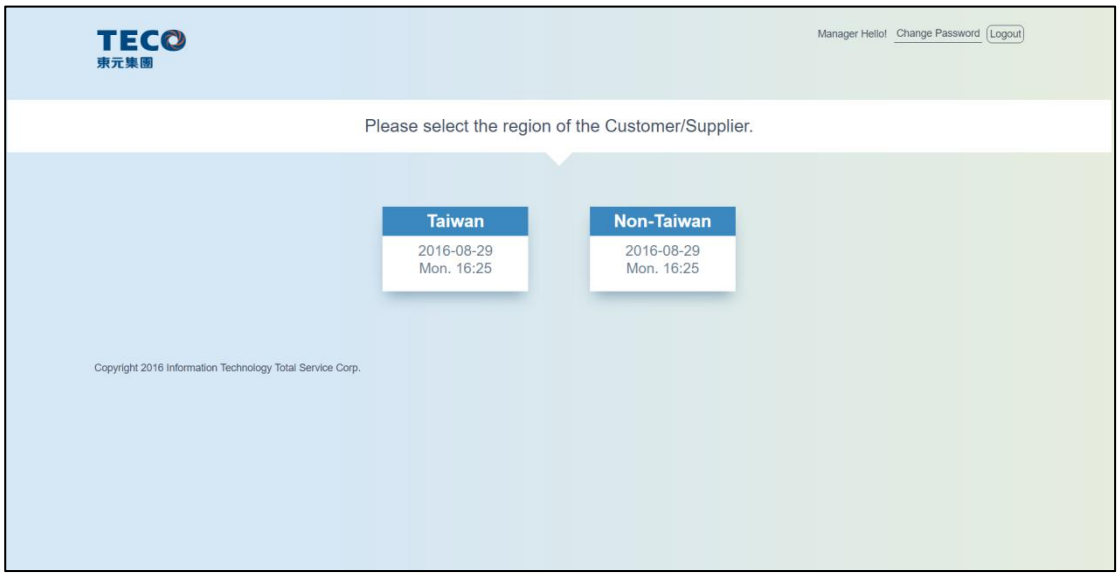


3. Go Back to Select Region Page

1). After login, click the logo on left top in any page



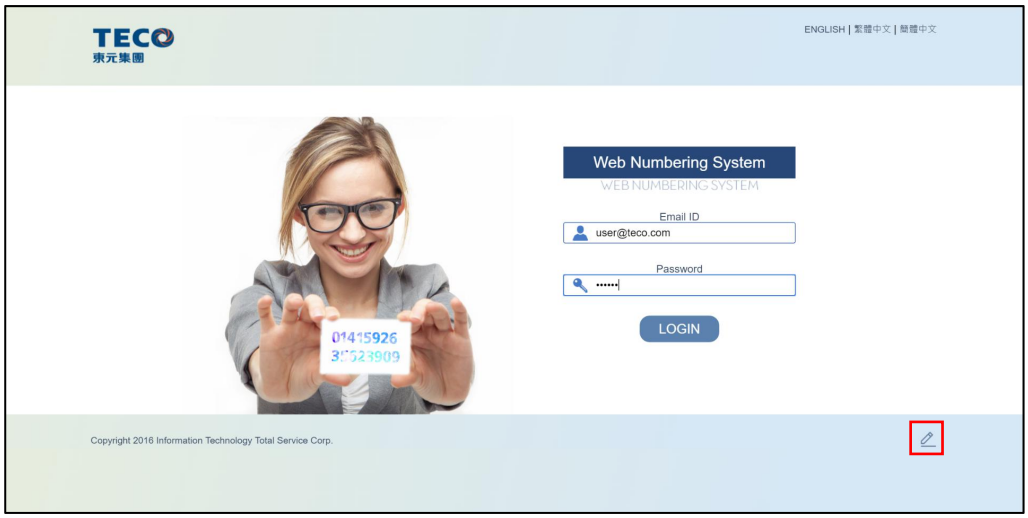
2). Navigated to "Select Region" page.



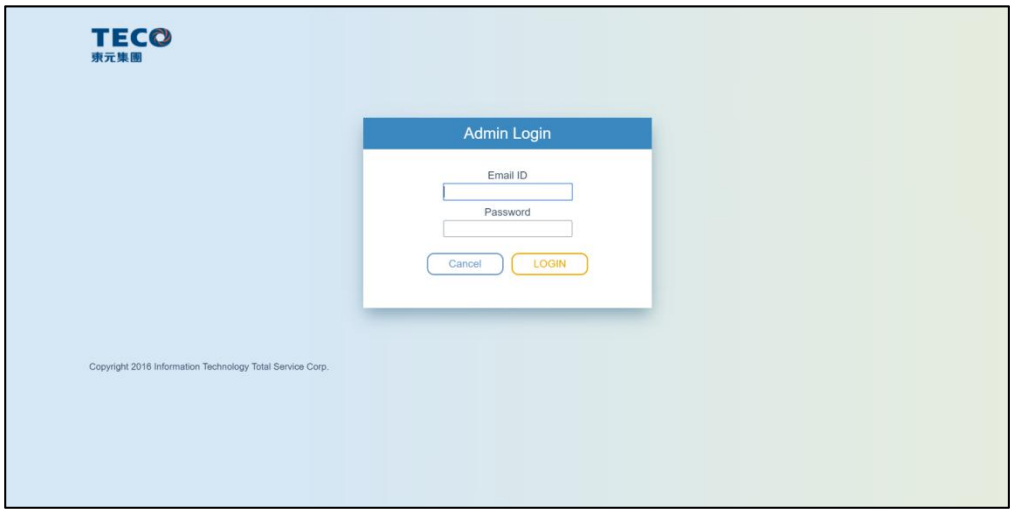
IV. For Administrators

1. Add New Requestor(s)

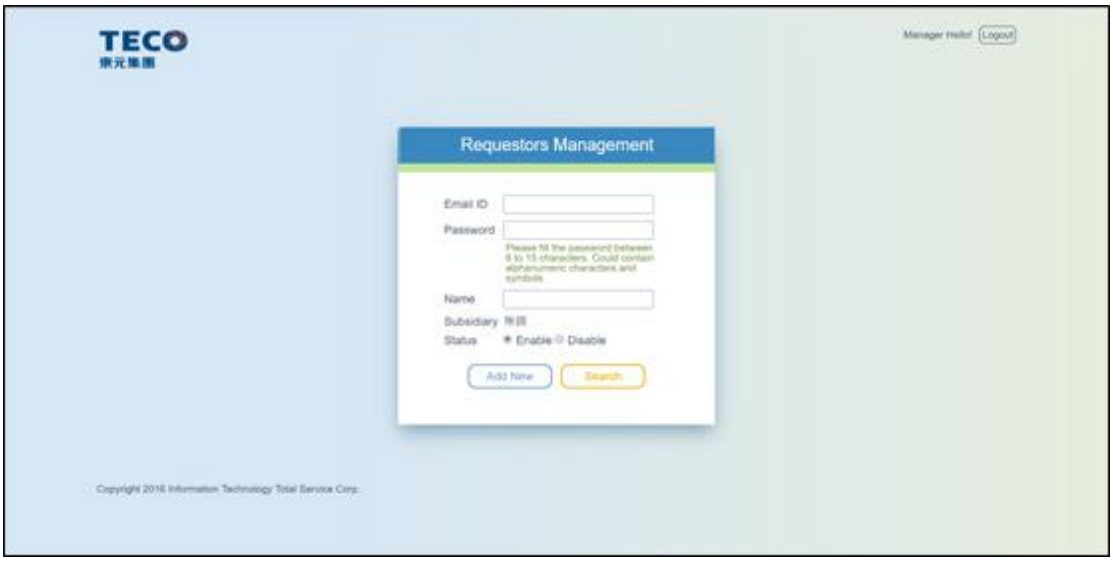
1). Set the system language, and click the icon on the right bottom.



2). Enter the Admin Login page, login with your Email ID and password.



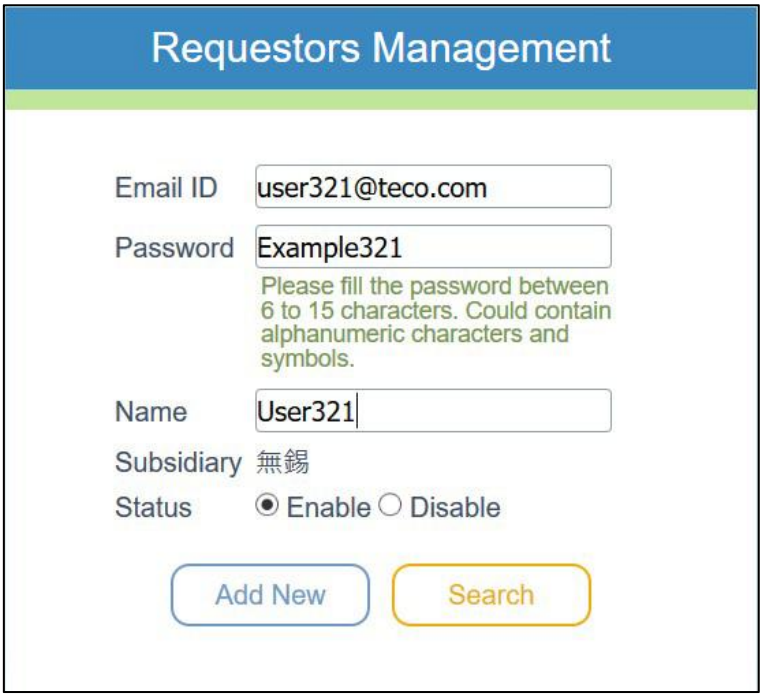
3). Enter the Requestor Management page



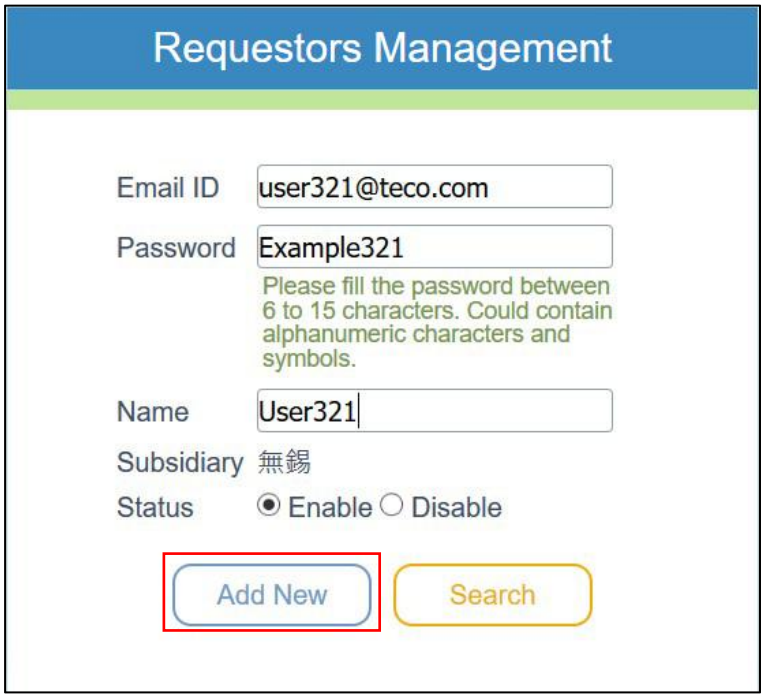
4). Fill in the user information you'd like to add

- **Note that Administrator can only add and search for requestors in the same Subsidiary as him/herself.**

Example:



5). Click “Add New”



6). Successfully added

7). After the process, check the data you just added

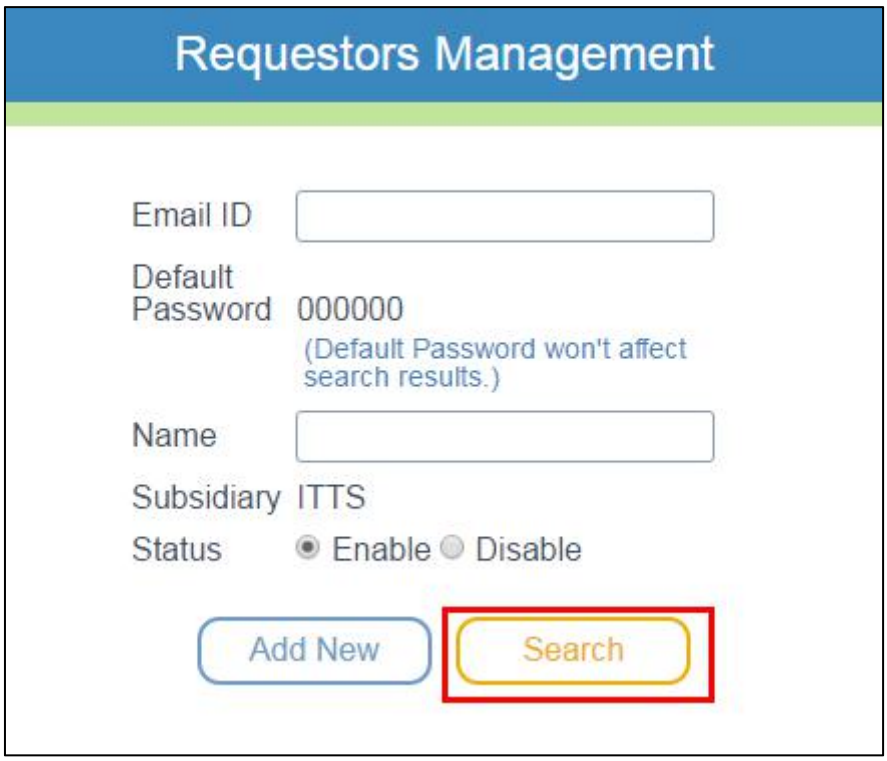
#	Email ID	Password	Name	Subsidiary	Status
N/A	user321@teco.com	Example321	User321	無錫	Enable

8). Finished

2. Search for Requestors

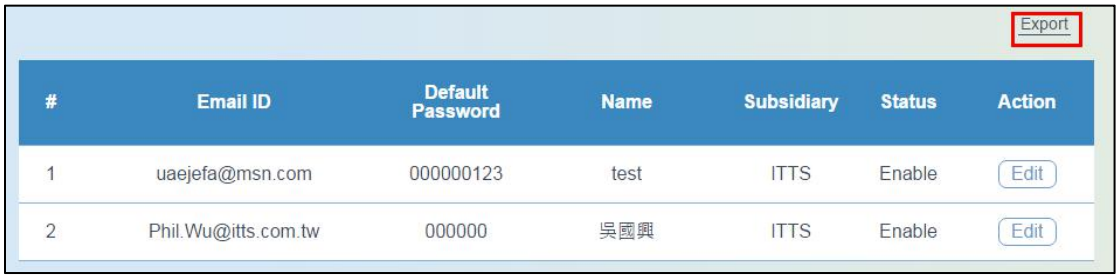
1). Fill in your search input(s), and click "Search".

- If no search condition, all users in the same subsidiary as administrator will show.



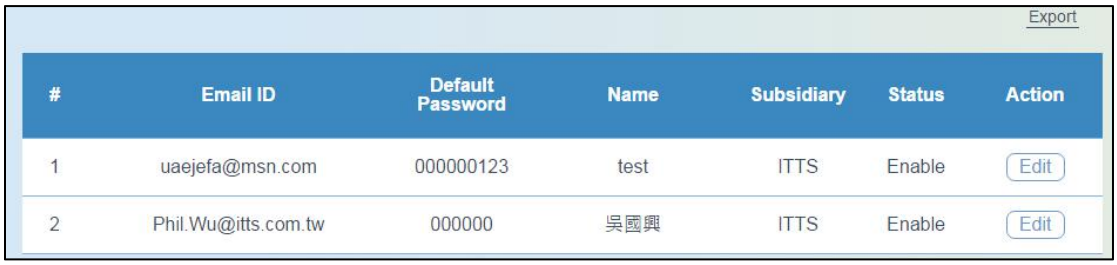
2). See requestors list

- If you want to export the list to file, please click "Export"

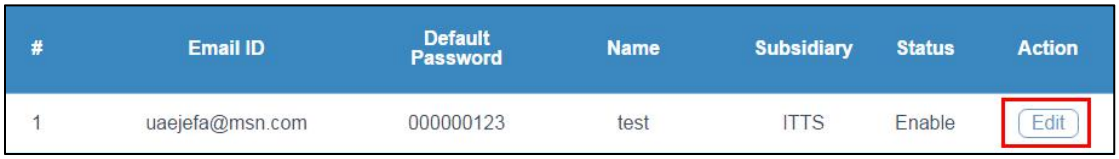


3. Edit Requestors

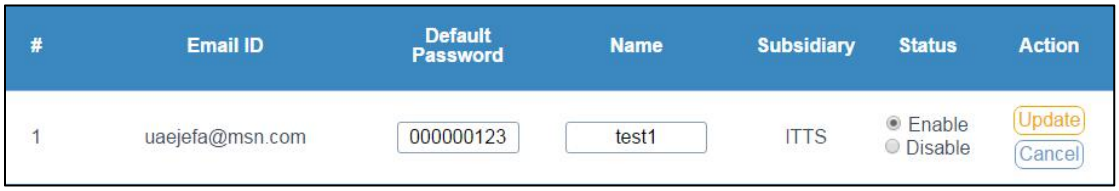
1). Search for requestors (Please refer to IV.2 Search for Requestors if needed)



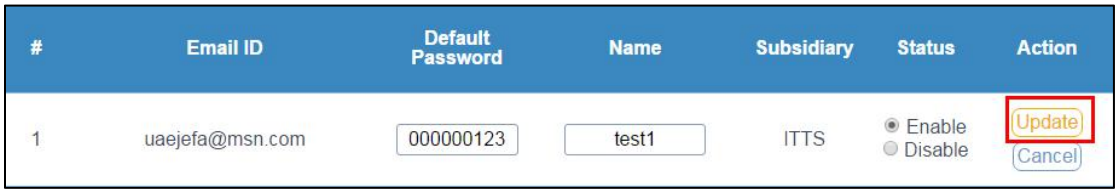
2). Click “Edit” button of the data



3). Edit



4). Click “Update”



➢ If you want to cancel edit, click “Cancel”

5). Success message will show

6). Finish

V. Q&A

1. **Why is the Login screen displayed incorrect?**
   Please confirm the browser type, recommend Google Chrome or Firefox browser

2. **In Non-Taiwan region, the country code drop down option cannot be displayed?**
   Please confirm the browser type, recommend Google Chrome or Firefox browser

3. **How to enter the administration function**
   Before log-in, click the "Admin Login" icon at the bottom of the right hand side.

4. **Can it be use the "Enter" or "Space" key to get into the next column for data entry**
   You can use the "Tab" key to get into the next column

5. **Can it be use the "Enter" or "Space" key to get into the next column for data entry**
   You can use the "Tab" key to get into the next column

6. **Can it be use the "Enter" or "Space" key to get into the next column for data entry**
   You can use the "Tab" key to get into the next column

7. **Can it be use the "Enter" or "Space" key to get into the next column for data entry**
   You can use the "Tab" key to get into the next column

8. **After selecting Apply, then cancel and modifying the entry and selecting Apply a second time, the system discards the first customer/supplier number.**
   When user click the "cancel" button and back to the data entry screen, system will generate a new code when if user reapplied a new code of customer or supplier.

9. **When after completed the "Established in SAP" process, does it means the local SAP be created as well?**
   No, the "Established in SAP" process, currently, just revised the Auto-Coding system status. You need to complete your local SAP master file setting process.

10. **Why is the back/forward button on browser not leading to my expected page/result?**
    Since the system is a Single Page Application, we recommend all the manipulation should be done within page. Clicking back or forward button on browser may lead to unexpected result.