PO Collaboration
SourceDay + VISUAL

Your VISUAL ERP streamlines many of your processes, but when it comes to PO changes, your team is still stuck in manual work, like spreadsheets, emails, and post-it notes. SourceDay leverages the power of your VISUAL ERP through a robust integration that handles all communication of changes for you and your suppliers within one solution, so everyone is on the same page—all the time. By digitizing and automating your purchasing teams' manual work, SourceDay makes your business stronger and more resilient.

Ensuring SourceDay is a VISUAL ERP expert is our team's top priority. We have a dedicated group of experts who are constantly researching and handling our strategic integrations with VISUAL and the relationship with partners to continue to be the most valuable addition to your VISUAL ERP.

"One of the greatest benefits that we've seen to date is the time-savings for each of our buyers. After streamlining the communication process between buyers and vendors...we're seeing a savings of 1-2 hours per day."

-Louis Mayer, ERP Improvement Manager
Napoleon Products, VISUAL Users

Unified Supplier Collaboration

SourceDay's PO Collaboration solution helps manufacturers make better direct materials purchasing decisions, save money, and meet more customer commitments. VISUAL is only as good as the data that feeds it. Manually maintaining data in VISUAL by emailing, calling, and faxing suppliers is impractical and often generates inaccurate or missing information.

Using manual processes to handle critical PO change data often results in data not being translated back into VISUAL accurately, or worse, not at all. Inaccurate PO data causes a ripple effect throughout the organization, from production, planning, and scheduling to finance and sales. To put it simply, it can be a mess.

Without accurate PO data, manufacturers are more susceptible to increased supplier expedited fees, late shipments, unpredictable inventory, working capital, and invoicing matching errors. SourceDay reduces these risks by offering a direct materials management platform that unites buyers and suppliers, creating supply chain visibility that you can trust.

1 VISUAL Partner

Changes to pricing, quantities, and delivery dates are automatically updated in real-time to VISUAL so PO data is 100% accurate.

2 Workflows Drive Performance

Automatically receive supplier PO acknowledgments and get notified by exception-based workflows that prompt you to take action when a PO has become critical or needs your attention.
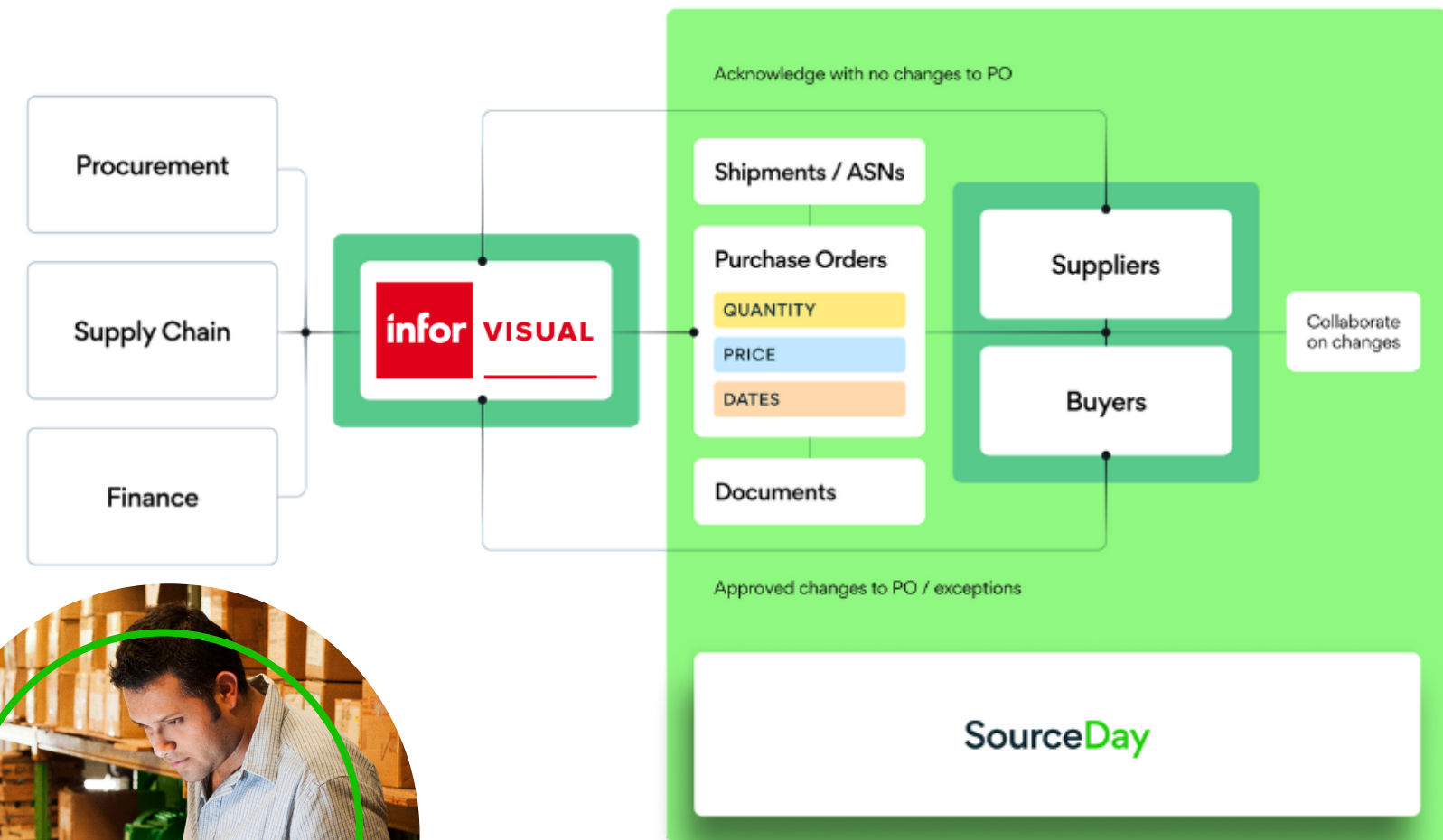
3 Supplier Engagement

SourceDay allows you to meet your suppliers where they're at - whether your supplier works in the SourceDay platform, via email, or even EDI - you can now work with all of your suppliers in SourceDay.

4 Data & Insights

View a full history of every PO action taken across all your suppliers on every PO, with just a single click in the SourceDay platform, including a date and time stamp. Buyers and suppliers can leverage built-in supplier scorecards to pass ISO audits, easily share and tag documents to POs, and create critical shipping/ASN data.

SourceDay

SourceDay PO Collaboration Platform

Acknowledge with no changes to PO

Procurement

Supply Chain

Finance

infor VISUAL

Shipments / ASNs

Purchase Orders
- QUANTITY
- PRICE
- DATES

Documents

Suppliers

Buyers

Collaborate on changes

Approved changes to PO / exceptions

SourceDay

Key Features

- VISUAL Strategic Partnerships
- Automated PO acknowledgments
- Free for suppliers
- SourceDay platform, email, and EDI workflows for supplier flexibility
- Lightweight IT integration
- PO audit trail
- Exception based workflows
- Advance shipment notices

- Bi-directional data sharing with VISUAL
- Easily expedite or de-expedite
- Built-in supplier scorecards
- Easily expedite or de-expedite
- 100% direct materials PO delivery
- Manage all MRO and direct material POs in one place
- Notifications that drive action

SourceDay

SourceDay
How **Everyone** Benefits

- Receive timely PO confirmations and changes from suppliers
- Find MRP inaccuracies with accurate PO data
- Build strong supplier relationships with supplier scorecards
- Users and suppliers receive SourceDay training and onboarding, on-demand product walk-throughs, and ongoing support

Buyers

- Accurate lead time and MRP data improve on-time delivery
- Increased visibility into KPIs that help make better buying decisions: OTD, move-ins/move-out, price changes, and more
- Quick onboarding ensures speedy time to value
- Lightweight IT integration
- Users and suppliers receive SourceDay training and onboarding, on-demand product walk-throughs, and ongoing support

IT

- Quick integration ensures speedy time to value and ROI
- Lightweight IT integration with VISUAL
- Training done by SourceDay's team to take pressure off your IT team

Executives

- Reduce business risk caused by external suppliers
- Decrease customer SLA penalties
- Lower average inventory on hand to increase inventory turns
- Increase ERP data accuracy for key business decisions

SourceDay

Manage by Exception

SourceDay's purpose is to help manufacturers manage POs by exception. It allows users to quickly and easily identify and take action on critical POs that require more attention, like unconfirmed POs, high-priority orders, and POs with questions.

Instead of sifting through spreadsheets to see which POs are already late or about to be late, SourceDay automatically notifies you and prompts you to take action on those POs with your suppliers. 52% of PO lines will change before price, quantity, and delivery dates are finalized; SourceDay lets you focus on resolving those changes and trust that the other 48% are processed automatically.

52% of PO lines will change during the first mile of the direct spend procurement process.

"One of the biggest challenges we had was receiving confirmations on our POs and the whole communication process. It was very manual, and it took up a lot of time. It was easy to miss information and to lose some of those confirmations between the vendors and the buyers."

-Louise Mayer, ERP Improvement Manager at Napoleon
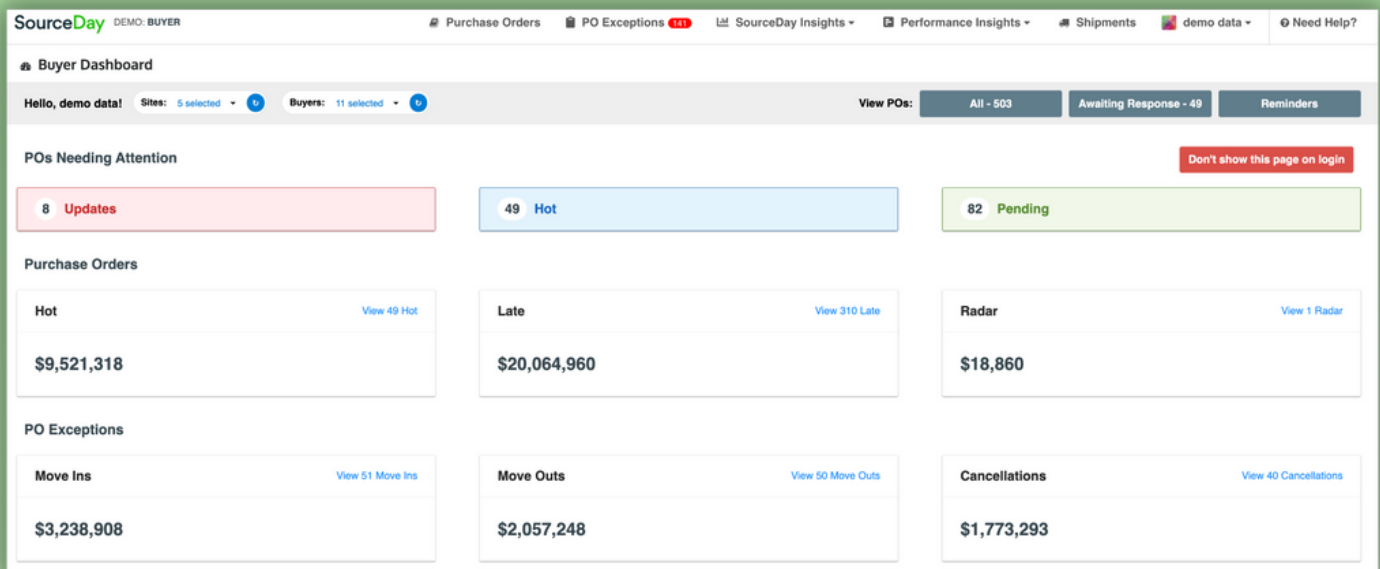*VISUAL Users*

52%

SourceDay

PO Dashboard

Navigating supplier-buyer relationships has never been more streamlined. Whether your supplier engages via our platform, intuitive email workflows, or EDI, every change funnels back to the PO Dashboard.

SourceDay ensures you're always in the loop. Our smart notifications on updates and prescriptive workflows guide users, ensuring POs are acknowledged promptly and accurately.

When a supplier suggests an update—such as cost, quantity, or due date—you're instantly notified, granting you the power to approve or decline in real-time. Never miss a high-priority PO update again. SourceDay notifies you and your supplier early so nothing slips through the cracks.

But that's not all. Upon approval, all these PO modifications are seamlessly integrated back into VISUAL. This ensures your entire organization consistently operates with the most current and accurate data. Welcome to Unified Supplier Collaboration, where every interaction, regardless of the medium, culminates in one spot for top-level clarity and efficiency.

SourceDay

SourceDocs
Document Sharing

SourceDay's PO solution allows the sharing of documents bi-directionally. Users can attach documents to a PO line, a particular SKU, or individual suppliers in SourceDay to help prevent costly supplier disagreements, reducing material scrap from wrong revisions, and reducing costs with rework and returns. Within SourceDay's platform, buyers and suppliers can easily share and collaborate on schematics, drawings, Gerber files, CAD files, solid works files, submittals, MSDS sheets, certifications, and more. Suppliers can share shipping documents, CoCs (Certificate of Conformance), or CO (Certificate of Origin).

Shipments Visibility

With SourceDay's shipping functionality, buyers gain visibility to vital shipment data and actual delivery dates. Once ready to ship, suppliers complete ASNs within SourceDay's platform and specific shipping info such as quantity, lot number, tracking number, and PO number. Receiving teams can plan for deliveries and work more efficiently with this readily available data.

SourceDay DEMO: BUYER   Purchase Orders   PO Exceptions **141**   SourceDay Insights ▾   Performance Insights ▾   **Shipments**   demo data ▾   Need Help?

Home > Shipment

Shipment Table

⫾⫾ Manage Columns

| Shipped ▾ | | | | | | Export | Advanced Search | Search | 🔍 |

		pany Name ⇅	ASN Number ⇅	Item (P/N) ⇅	Item Description ⇅	PO Line ⇅	Ship Date ⇅	Box Quantity ⇅	Quantity Per Box ⇅	Line Quantity ⇅	Stat
Shipped			ASN00011329	0EW92B77LR	CKWR, 10pc SET NS	PO21850417-L7-R	04/13/2023	1.0	1350.0	1350.0	shippe
Completed		ailey	ASN00011334	XVKPF6PTA4	TACOSETTER BYPASS 2-8 GPM _223.23...	9970867-L2-R1	04/20/2023	1.0	160.0	160.0	shippe
Ready to Ship			ASN00010582 📎	7KDJ7GX0JQ	BRASS RIGID NEMA1	9970426-L1-R3	11/17/2022	1.0	250.0	250.0	shippe
Unshipped											
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	Print ▾	Anderson and Bailey	ASN00009764 📎	7KDJ7GX0JQ	FTG TBG TEE RDCR 1/2TX1/2TX3/8T BU...	PO76408-L2-R0	08/16/2022	1.0	30.0	30.0	shippe
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	Print ▾	Anderson and Bailey	ASN00008642	VGEQC6AS40	FTG TBG NUT 1/4MVCR 5/8HEX .72"L SS...	PO76408-L28-R0	06/14/2022	1.0	500.0	500.0	shippe
	Print ▾	Okuneva LLC	ASN00899463	SA9EWJHDQM	COLLAR,SET,METRIC,S/S,25MM	480573-L1-R1	02/24/2022	1.0	1.0	1.0	shippe
	Print ▾	Murazik Group	ASN00899462	3O7YB6QV4S	BELT,TIMING,3/8P,3/4W,64.0"L STEEL	480572-L1-R1	02/24/2022	1.0	5.0	5.0	shippe
	Print ▾	Reilly LLC	ASN00899531	P69IUPH6UG	TOOL, MSHR WIRE BOLSTER: PMS 186C ...	PO21853262-L42-R	02/21/2022	160.0	36.0	5760.0	shippe
	Print ▾	Reilly LLC	ASN00899433	7EN6DVMJ90	Beacon,LED,RGAB,W/Horn,Q-Disc	480562-L1-R1	02/24/2022	1.0	3.0	3.0	shippe

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> "SourceDay paid for itself in less than 3 months."
> -Jean Louis Marin, VP of IT at Napoleon
>
> "We've become much more effective due to the time savings we're seeing...our buyers can make better decisions when suggested POs come up for review."
> -Louise Mayer, ERP Improvement Manager at Napoleon
>
> "

Ending the Game of Telephone Tag

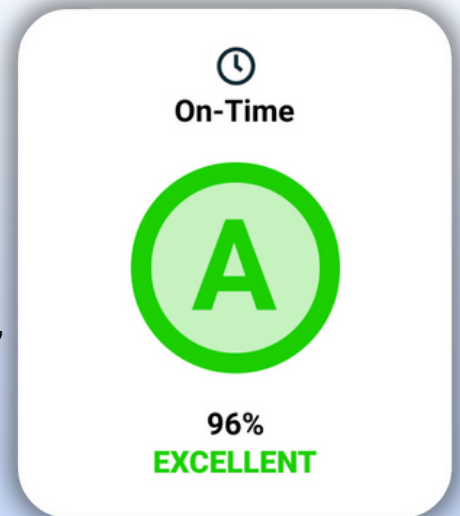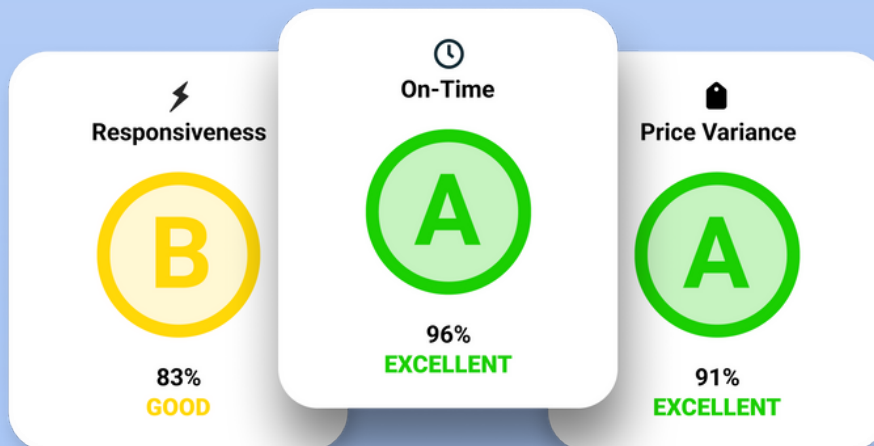| 35%	90%	1-2 hrs
More On-Time Deliveries	Fewer Incorrect Invoices	Saved per Day

SourceDay

Scorecards

Build upon your supplier relationships with the power of insightful data. Our Supplier Scorecards provide real-time visibility into your partnership's performance, serving as a valuable tool for improvement and collaboration.

These Scorecards go beyond simple data collection and monitoring—they enable a collaborative exchange of actionable insights, helping to foster an environment of transparency and mutual growth. With key performance indicators such as price variance, on-time delivery, and supplier responsiveness at your fingertips, you can directly address areas of concern and celebrate successes. They empower dialogue. Use them to communicate with your suppliers, discussing trends, opportunities, and strategies for continuous improvement.

Whether it's honoring excellent performance or constructively addressing areas of improvement, Supplier Scorecards serve as the basis for productive, data-driven conversations.

This iterative process promotes alignment between you and your suppliers, driving toward common goals and shared successes. In the spirit of Unified Supplier Collaboration, let's not just aim for efficiency—let's build stronger, more resilient supplier relationships together.
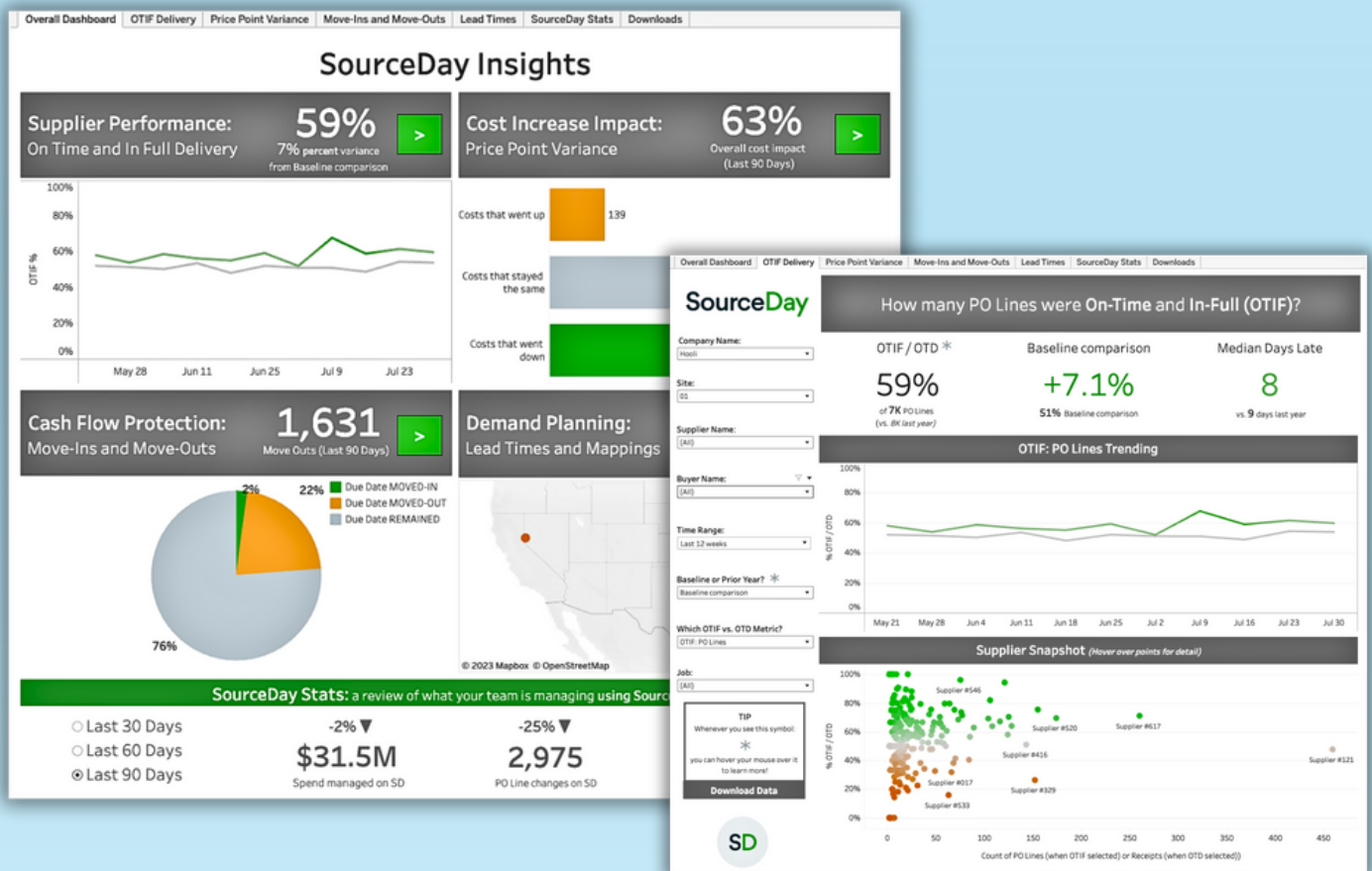
SourceDay

SourceDay Insights

Visibility you can trust

Stay up-to-date on the most important projects, orders, and suppliers to your business with insights into KPIs like On-Time In Full (OTIF), Cash Flow Protection via move-in/move-out visibility, Lead Time Accuracy, and Purchase Price Variance.

What's even better, you can measure productivity and efficiency with concise data and know where changes to your process can make the most significant impact. Take a deeper dive into how your team and your suppliers are using SourceDay, the number of changes per PO, and how long it's taking to get responses on your high-priority orders.

SourceDay Insights is the visibility into your supply chain you can trust because it's your real-time data helping you make better buying decisions.

SourceDay

Success Enablement

With SourceDay, you're not just getting a platform; you're unlocking a partnership dedicated to your success. Our team of experts will guide you, your users, and your suppliers to engage and collaborate effectively with SourceDay in the way that makes the most sense for that partnership.
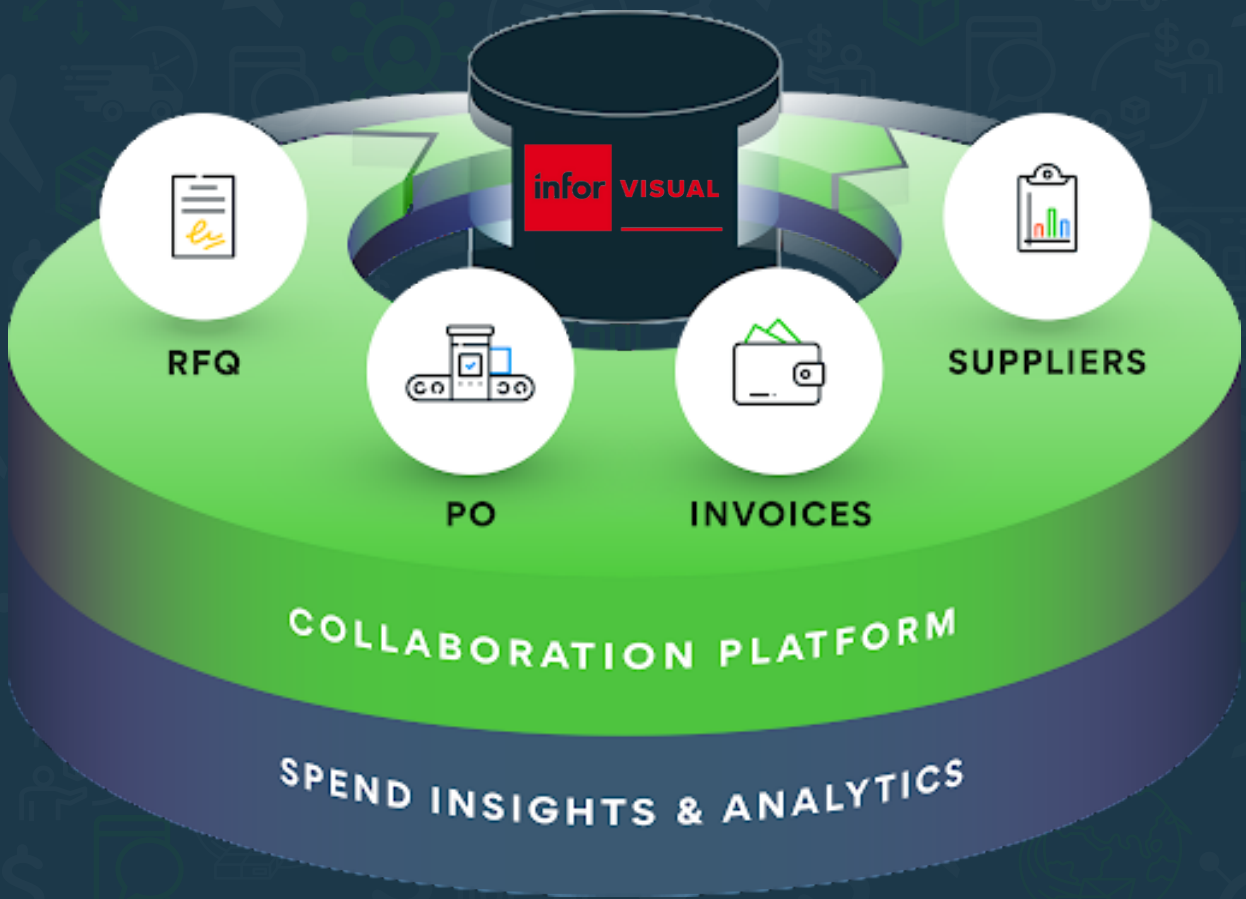
Rather than simply setting up login accounts, our success team will empower your buyers and suppliers with real-time training, followed up with on-demand training materials designed to maximize performance and improve efficiency.

Buyers have the flexibility to shape their supplier interactions in the most efficient and harmonious way. Change isn't always an option - our solutions are designed to empower buyer success by facilitating effective supplier relationships and management, meeting suppliers where they are in their technology journey.

SourceDay's dedication to your success begins with fast implementation and continues with ongoing support via detailed walk-throughs, informative webinars, and comprehensive guides. All of this is designed to support buyers throughout their journey while giving you and your team a single process and complete visibility into the entire PO lifecycle. All in one place - SourceDay.

Unified Supplier Collaboration is not just a corporate tagline. It's a promise we deliver. Step into a new era of supplier engagement with SourceDay.

infor VISUAL

RFQ

PO

INVOICES

SUPPLIERS

COLLABORATION PLATFORM

SPEND INSIGHTS & ANALYTICS

Unlock the full potential of your supply chain with SourceDay's Comprehensive Platform:

PO Collaboration | Invoice Automation | RFQ Collaboration

SourceDay's platform is more than a suite of tools—it's your key to unlocking a more connected, efficient supply chain. Our PO Collaboration and Invoice Automation platforms transform your supply chain operations from the initial PO to payment processing. These systems work in unison, providing unprecedented visibility and building trust that enhances supplier relationships, accurate PO data, on-time payments, and so much more.

Simultaneously, our standalone RFQ Collaboration tool empowers your team to manage the request for quote process more effectively, enabling strategic sourcing decisions based on real-time data.

It's not just about oversight—it's about enabling actionable insights that drive strategic decision-making and operational excellence.

Get started today with SourceDay. We promise you won't regret it.

SourceDay.com