eye-share Portal

End user manual

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1. What is eye-share Portal

Usage of the Portal is related to Order receival from Equinor, including Order Response
o It enables suppliers to receive Order messages on Peppol BIS** format and provides ability to return an Order Response to Equinor through the portal and the Peppol infrastructure. Returning an Order Response by either accepting or rejecting the Order is mandatory for all suppliers.
o It is also possible to send Invoices from an accepted Order on the same format. This is an option that the supplier needs to activate if applicable.
o Soon it will be possible to return Shipping Notifications (also called Despatch Advice) from the Order

The Supplier portal edition is only used by suppliers. A user may have access to both the eye-share "invoice module" and Supplier portal edition for Orders and return messages based upon an Order, but there must be unique username for each of these two portal editions.

The eye-share Portal is integrated with the Peppol Infrastructure for:
- Receiving Order, Order Change and Order Cancellation messages.
- Returning Order response for the received Order or Order Change
- Optional returning Invoices based upon the content in an Order
- Optional return advanced shipping notification/Despatch Advice is planned to be implemented

1.1.   Order process overview

The chart presents the complete flow and process involved in using the Order module.
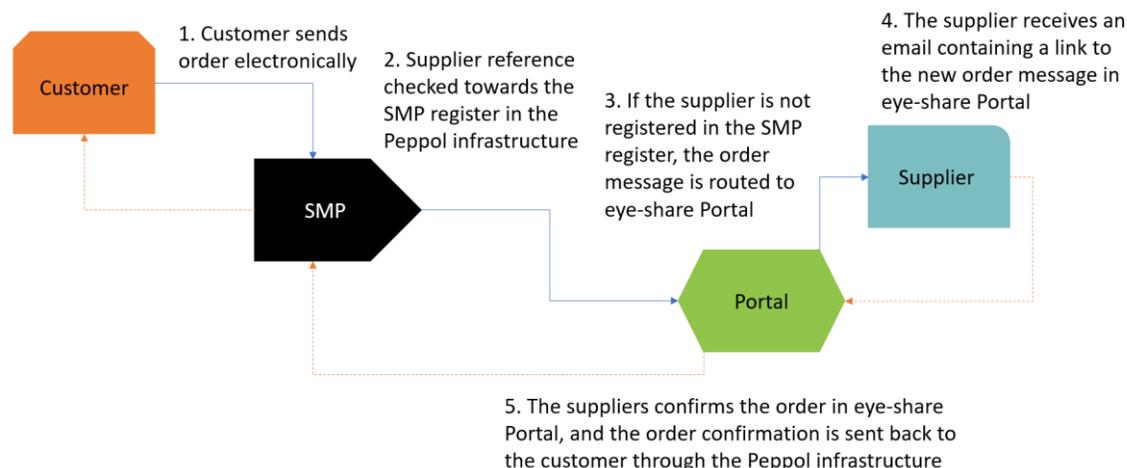
2. B2B alternative to eye-share Portal

2.1.   How Peppol BIS is working?

Instead of using eye-share Portal for Order communication, it is possible to activate a direct integration between the Customer and the Supplier using the Peppol BIS network.

Peppol BIS (Business Interoperability Specifications) operates as follows:

- Peppol facilitates the exchange of standardized electronic documents among trading partners through the Peppol network, using a 4-corner model. These electronic documents encompass various types, such as e-Orders, e-Advance Shipping Notes, eInvoices, eCatalogues, Message Level Responses, and more.

- Peppol Access Points serve as the gateway for users to connect to the Peppol network and conduct electronic document exchanges according to Peppol's specifications. Both buyers and suppliers have the freedom to select their preferred single Access Point provider, which allows them to connect to all other participants already active on the Peppol network. This principle adheres to the idea of "connect once, connect to all," streamlining the process of electronic document exchange and ensuring interoperability among participants.
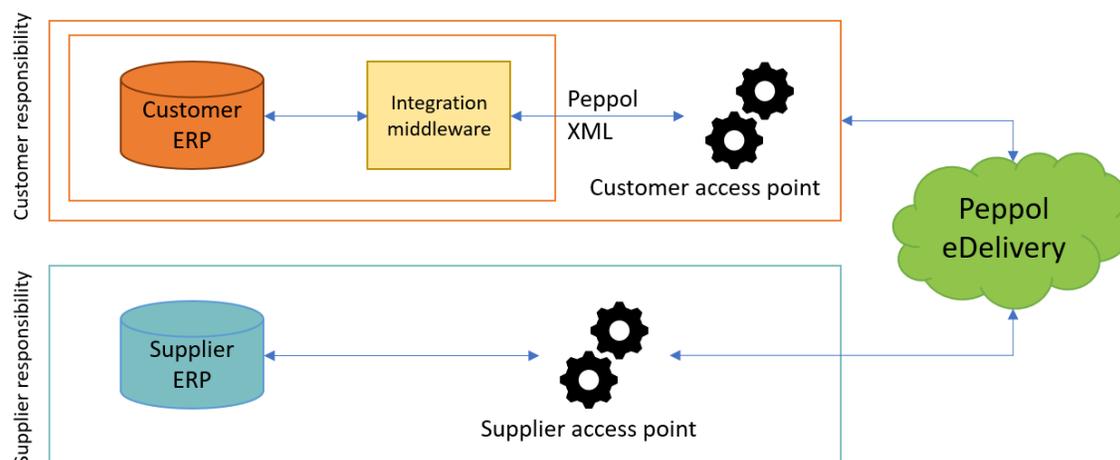
2.2.   How to activate B2B integration

Suppliers that receive their purchase orders in eye-share portal and want to move from portal collection to B2B (direct integration) must contact their Customer directly.
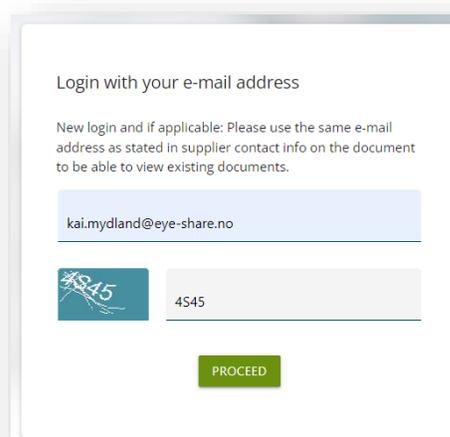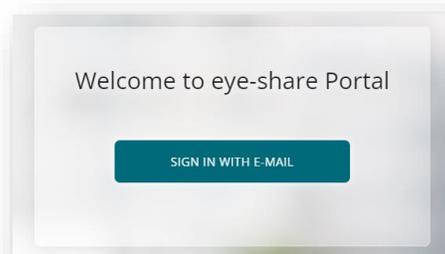
3. User login in eye-share Portal

The eye-share Portal solution is by design an open platform, which means that anyone with access to the solution link can utilize the service without the need for upfront user account registration. By default, all users have the ability to register a new invoice and send it to any company registered as a Customer within the eye-share Portal solution.
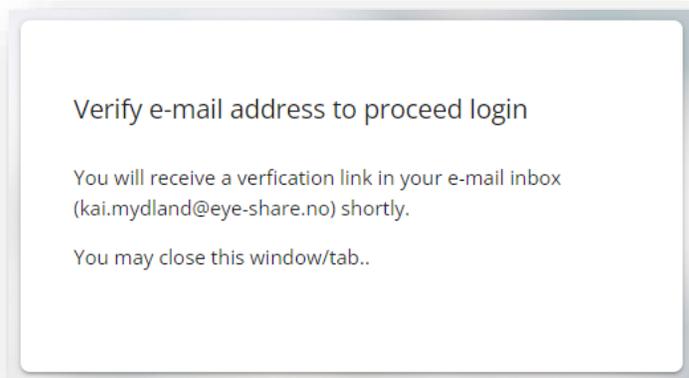
In general each user is granted access only to the content they create, with no access to other users' data.

Please note that the visibility of Customer accounts may differ depending on the specific URL the user accesses.
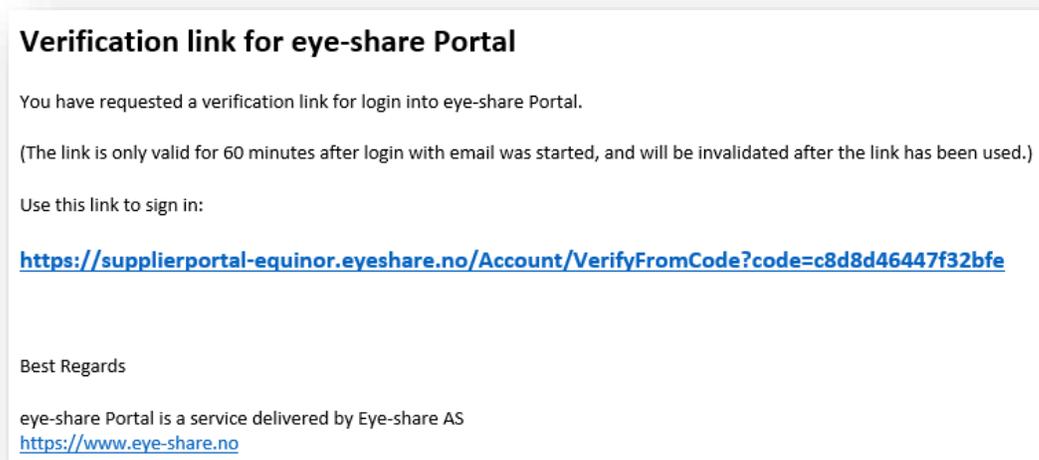
Important: Please be aware that this functionality does not apply to users who are accessing the Order module. In the Order module, users must receive invitations either from the Customer or from an existing supplier account. More details about this can be found in Section 5.1, "First Time Use," within the Order module section, under Section 5, "Order Module."

To get started, users will need to sign in using their email address.

Verify e-mail address to proceed login

You will receive a verfication link in your e-mail inbox
(kai.mydland@eye-share.no) shortly.

You may close this window/tab..

To proceed with the login process, users are required to utilize the verification link sent to their email address, confirming ownership of the email address.

Verification link for eye-share Portal

You have requested a verification link for login into eye-share Portal.

(The link is only valid for 60 minutes after login with email was started, and will be invalidated after the link has been used.)

Use this link to sign in:

https://supplierportal-equinor.eyeshare.no/Account/VerifyFromCode?code=c8d8d46447f32bfe

Best Regards

eye-share Portal is a service delivered by Eye-share AS
https://www.eye-share.no

4. Startpage and menu

Upon logging into the eye-share Portal, users will encounter a display of tiles and information. The availability of these tiles will depend on the user's access level and the specific configuration of the Customer's setup.

Please take note that if a user accesses a Customer-specific URL with filtering, and that particular Customer does not utilize the Invoice module, the login screen will only display the information tile.
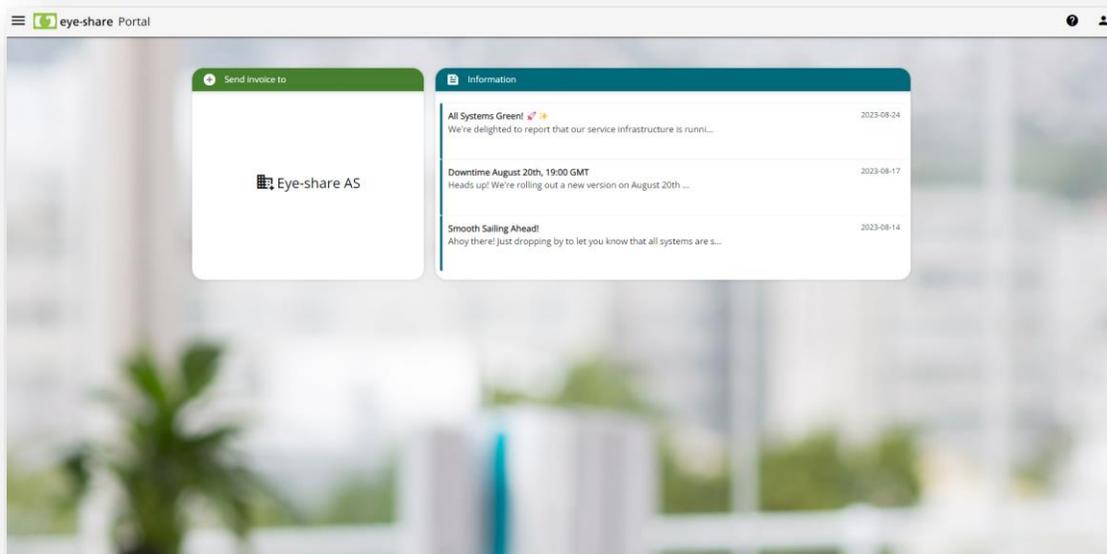
You can find the application menu positioned at the top left corner of the interface.
Nytt bilde relevant for equinor supplier portal?
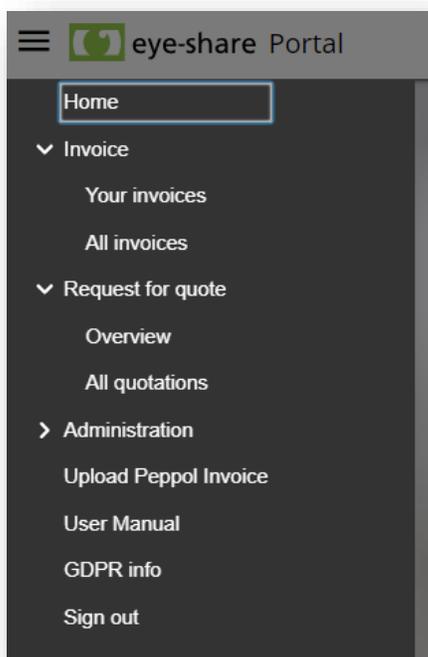
5. Order module

5.1. First time use

When a new Order message is sent from the Customer to a supplier's contact email address for the very first time, the eye-share Portal will take the following automatic steps:

1. It will create a new administrator user object for that specific email address.
2. It will also establish a new Supplier account if one does not already exist.
3. The Portal will then promptly dispatch a login link to the provided email address.

The initial login process involves two steps:

- First, the user clicks on the link to confirm ownership of the email address.
- Subsequently, they receive a second link containing a security code, enabling instant login. This link is time-sensitive and will expire within 60 minutes if not used.

For subsequent logins, users can follow the standard routine outlined in Section 3, "User Login".

Note: When using the Order module, manual user logins cannot be created in advance. At least one of the following conditions must be met before a user can be added to the system:

- The user is invited by an existing user.
- The user receives information about a new order via email.
- The user is added as a "Site administrator".
- The user is added as a user on a supplier account.

In some cases, suppliers may provide a shared email address to the Customer for receiving orders (e.g., orders@supplier.com). In such instances, the end user will need to log in to the application using this shared email address and the activation code sent to it to manage received orders. With this administration account, users can add new users to the supplier account within the eye-share Portal, allowing them to access orders using their personal email accounts. Se section 10.2, "User setup".
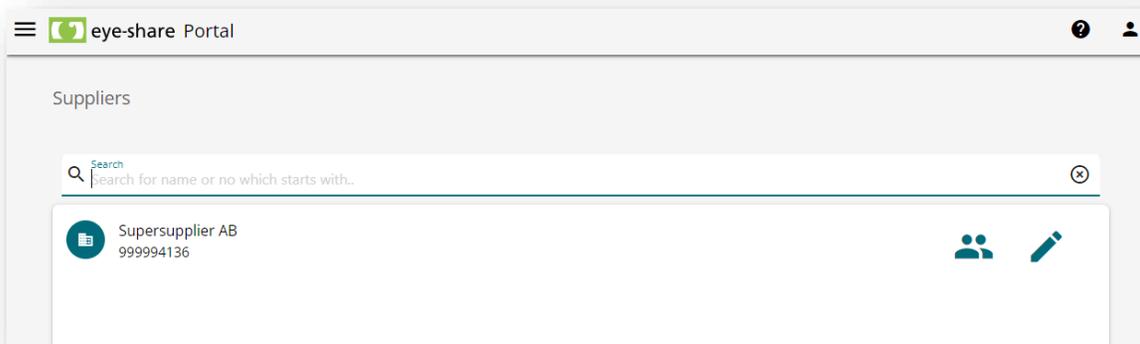
5.2. Supplier setup

The Supplier setup instructions and configurations apply specifically to scenarios where the Order module is in use within the eye-share Portal. This means that the Supplier setup and related functionalities are relevant and applicable primarily when dealing with orders and related processes. In situations where the Order module is not utilized, these Supplier-specific settings and features may not be relevant or accessible.

The Supplier setup can be accessed and configured through the top left menu bar. This menu provides users with a convenient and centralized location to manage and customize their Supplier-related settings and preferences, ensuring efficient control over Supplier-specific functionalities and configurations within the portal.
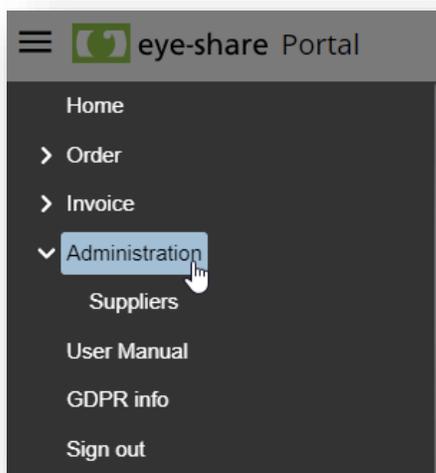
The function related to Supplier configurations is exclusively available to Administrator users within the eye-share Portal. Only Administrators have the authority and permissions to make alterations to any Supplier-related configurations.

In the right corner of the Supplier account, there are two available options: User setup and account settings.

5.3.   User setup

In the eye-share Portal, the user creation process is primarily automated and occurs when the Customer sends the first Order message to a specific email address associated with the Supplier. If a user is not connected to a given Supplier account, the user will not be able to access any Order messages for that Supplier. If the user has access, the user will see all Order messages for the Supplier account. A user can be connected to multiple supplier accounts.

Here are the key points related to this process:

- **Automated user creation**: When the Customer sends the first Order message to a Supplier's email address, eye-share Portal will automatically create a new user based on the recipient's name, email, and Supplier details. This new user will be linked to the Supplier account.

- **Administrator role**: All users who are automatically added and linked to a Supplier account will receive the Administrator role by default. This role grants them privileges to manage and configure user accounts within the Supplier account. There are only two roles: User and Administrator

- **Administrator privileges**: Administrators have the authority to add and delete regular users associated with the Supplier account. They can perform user management tasks within their organization.

- **User confirmation**: When a new user is added, they will receive an email notification and must confirm their new user account using email verification. This ensures the security and legitimacy of user accounts.

- **User deletion**: Administrators have the capability to delete user accounts if needed. They can initiate the user deletion process by clicking on the trashbin icon located in the right corner of the user profile row.

- **Resend invite:** This feature allows administrators to resend invitations to users directly from the user list. This can be useful if a user has not received or responded to their initial invitation, ensuring that they have access to the Supplier account and associated functionalities within the eye-share Portal.

This automated user management system simplifies the onboarding process for new users while providing Administrators with the control and flexibility to manage user accounts effectively within the Supplier account.
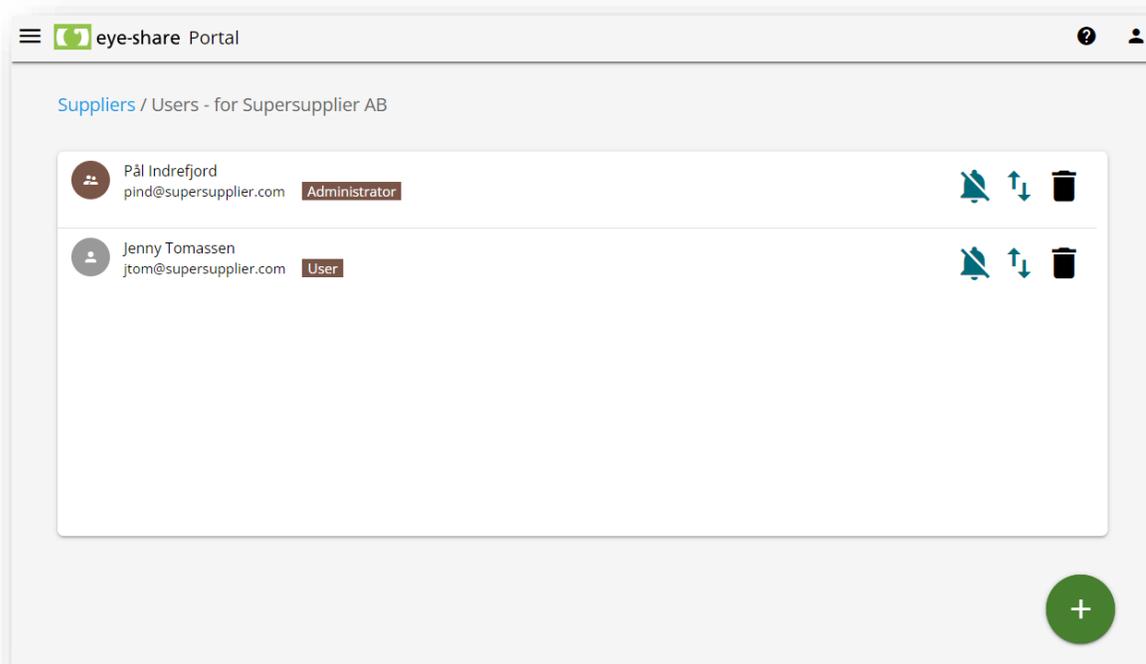
User account awaiting for the user to respond to the invitation, either automatically created by the receivel av an Order message, or manually invited by an Administrator user.


Understanding the options:

Administrator	Shows the user's current role
✏️	Edit user details
✉️	Resend email invitation
↑↓	Change role of user
🗑️	Remove user from supplier account

Administrators within the Supplier account have the ability to add new users. To do so, they can input the new user's email address by clickin the green + button.

Upon adding a new user, an invitation email containing a link is automatically generated and sent to the provided email address. The new user must click on this link to confirm their invitation and gain access to the Order messages associated with the Supplier account within the eye-share Portal.
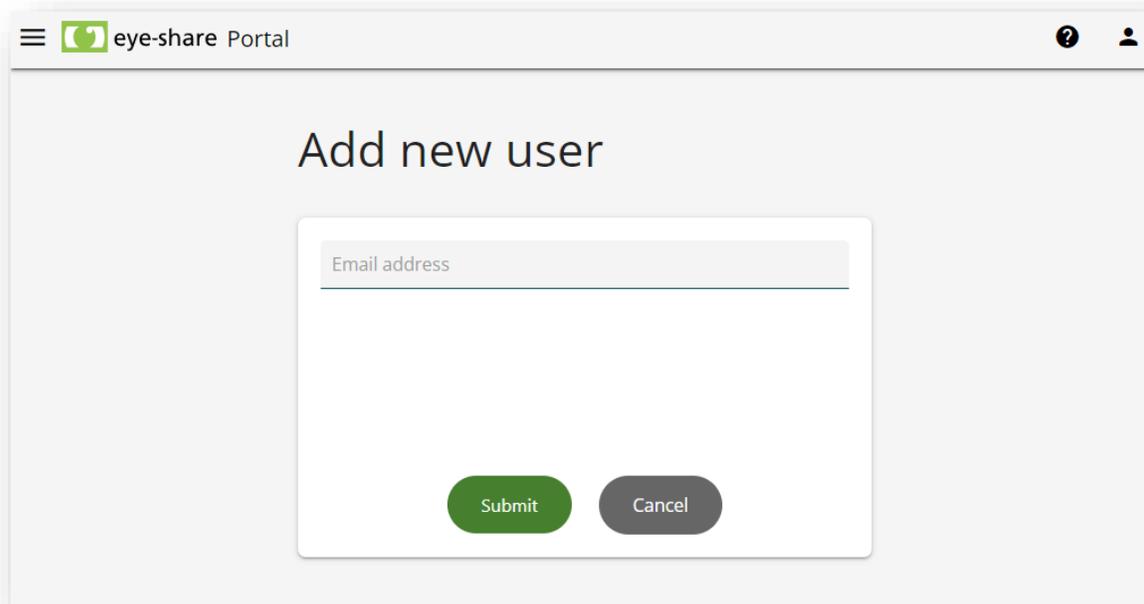
5.4.   Account settings

Users can access the supplier account settings view by clicking on the pencil button located to the right in the Supplier profile row. This action allows users to enter and modify the Supplier setup, enabling them to configure and customize Supplier-specific settings and preferences within the eye-share Portal.
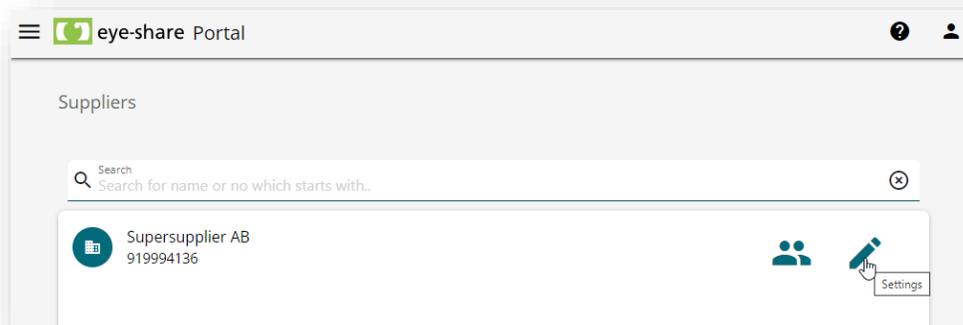
At present, the Supplier setup view primarily consists of module selections, bank details and default TAX id. These modules include the Order module and Invoice module, which are explained in detail within this manual.

Additionally, there is an option labeled "Order Invoicing," which is connected to the Order module feature.
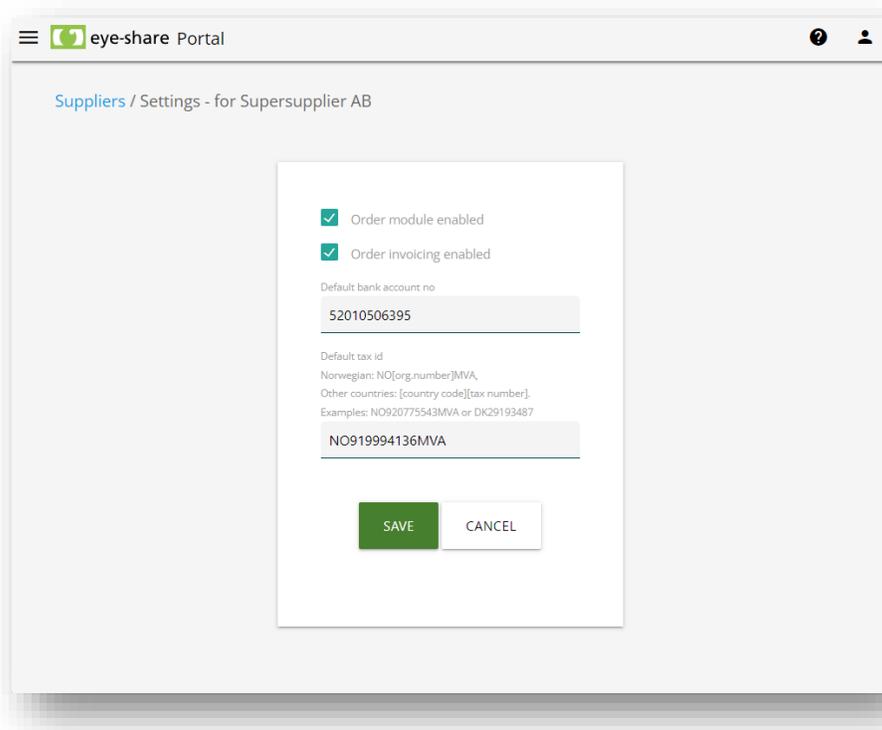
When both the Invoice module and Order module are enabled within the eye-share Portal, users gain access to multiple functionalities:

Order messages receival and confirmation: Users can receive and confirm Order messages from Customers. This involves handling incoming Order transactions and providing responses as needed.

Sending Invoices: Users have the capability to send invoices to the registered Customers within the Portal. This allows for electronic invoicing processes.

It's important to note that the Customer who enables the Supplier for electronic Order handling may not necessarily be a registered Customer for invoicing. These two modules, Order and Invoice, are disconnected by default.

If a Supplier wishes to use the Invoice feature connected to the Order handling, they would need to enable the "Order Invoicing" feature. Enabling "Order Invoicing" would bridge the gap between these two modules, allowing for seamless integration of invoicing processes with Order handling. This ensures a more cohesive and efficient workflow for Suppliers in managing their transactions.

5.5.   Order startpage and menu

Once logged in, users will be directed to the eye-share Portal startpage view. This view is equipped with tiles for streamlined navigation and access to essential information.

Notable features include:

- **Requires you attention:** Orders that currently demand immediate attention will be prominently highlighted.

- **Recent received orders:** A tile providing an overview of recent orders, enabling users to quickly access their order history.

- **Information:** This tile serves as a hub for messages and updates from the Customer.

Selecting any of the orders displayed within these tiles will seamlessly navigate the user to the specific order, facilitating efficient management and action.
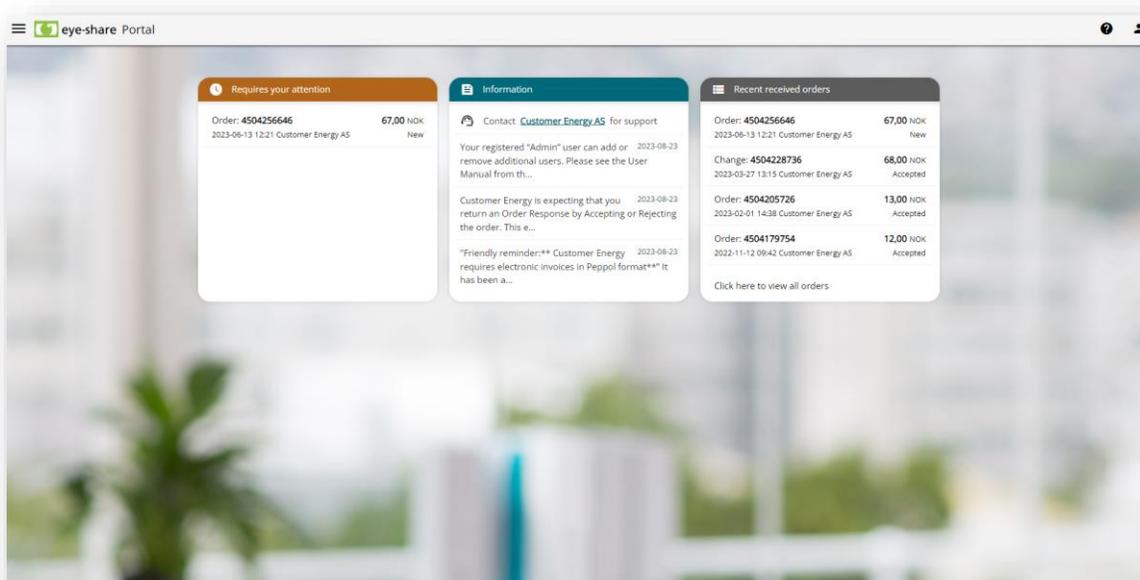
By utilizing the menu located in the top left corner, users can access various important features and sections within the eye-share Portal:

- **Order overview:** Navigate to the Order overview section for a comprehensive view of your orders.

- **Supplier administration:** If applicable, manage the supplier account and user access through this option.

- **User manual:** Access the user manual to find detailed guidance and information on using the eye-share Portal.

- **GDPR Information:** Find essential information related to General Data Protection Regulation (GDPR) compliance.

- **Sign out:** Log out of your eye-share Portal account to ensure security and privacy.
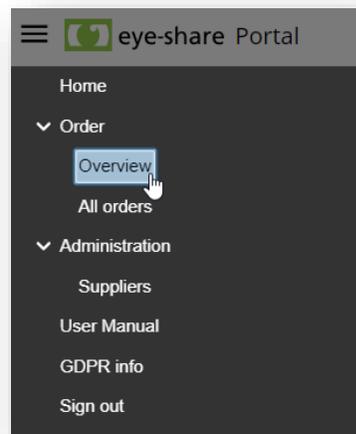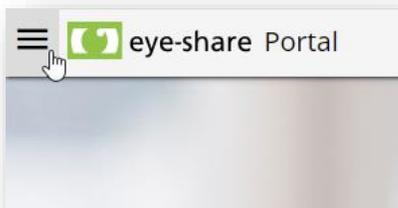
5.6.   Order overview and sections

The Order Overview provides users with a comprehensive view of all orders received from the Customer. It is divided into the following distinct sections:

Processing	This section displays new orders that are ready to be handled, confirmed, or rejected by either you or your supplier organization
Ready for invoice	In this section, you can find confirmed orders that are prepared for invoicing directly from the eye-share Portal. This feature is only applicable when activated.
Invoiced	This section contains accepted orders that have been successfully invoiced through the Invoice module within the eye-share Portal. This feature is also onlu applicable when activated.
Waiting	Orders accepted by the supplier with modifications, currently awaiting confirmation from the Customer.
Processed	This section serves as an archive for final processed orders, encompassing a range of orders, including those that were rejected, obsolete, canceled, and accepted.

5.7.   Order type and status

It's crucial to understand that an order in the eye-share Portal is always defined as a specific type of document, and it carries a particular status.

Important: Each order transaction constitutes a single document. For instance, when a Customer requests a new order, it is considered one document. When the Supplier confirms with changes, that becomes the second document. Subsequently, the third document might be the confirmation of changes from the Customer. Every time a new document is created with a new order reference, the old documents are either canceled

or marked as obsolete. This ensures clarity and organization in the document management process.

There are several types of order documents, each serving a distinct purpose:

Order	This document represents a new order initially sent from the Customer to the Supplier.
Change	The Change document signifies the Customer's acceptance confirmation of changes suggested by the Supplier. Additionally, the Customer may send changes independently from their Procurement solution, resulting in the creation of a Change document.
Cancellation	The Cancellation document is generated when the Customer sends a cancellation request for an existing order.

Various statuses are used to track the progress and status of order documents:

New	This status indicates a new order that has been sent from the Customer but has not yet been processed by the Supplier.
Change	This status signifies that the order document contains changes confirmed by the Customer.
Cancellation	This status is assigned when the Customer cancels the order directly within eye-share Portal.
Cancelled by the customer	The order is canceled based on a cancellation message sent by the Customer from their ERP solution.
Accepted	The Supplier has accepted the order as originally requested by the Customer.
AcceptedWithChange	The Supplier accepts the order but with changes that require confirmation from the Customer.
PartialDelivery	Indicates that the Supplier can deliver the order as originally requested by the Customer, but the delivery will be partial.
Rejected by supplier	The Supplier rejects the requested order from the Customer.
Error	This status is used to indicate technical errors. In such cases, it is advisable to contact the Customer for resolution.
Obsolete	The document is not the latest version of the order and is set to obsolete. This can be handled automatically or manually.
Invoiced	The order document has been invoiced through the invoice module within eye-share Portal.

5.8.   View attachments for an order message

To access the Attachments view within the eye-share Portal, you can simply click on the left button located on the message row.

Upon entering the Attachments view, you will find that the default display is a template stylesheet view of the original XML message. This view is designed to present all the information available in the XML file in a clear and organized manner.

Within the Attachments view of the eye-share Portal, you have several options for exploring and interacting with the files transmitted within the message:

Attachment navigation: On the right side, you can use the attachment navigation to inspect other files included in the message. This allows you to easily switch between different attachments.

Downloading files: To download a file, click on the cloud symbol located on the left side of the navigator pane. This will save the file to your local computer for offline access.

Opening files directly: PDF files will open automatically in the browser window for quick viewing. For other types of files, you may need to download them locally to your computer before opening. This ensures you can access and view them properly.

Attachment control bar: In the top left corner of the attachment view, you'll find an attachment control bar. From here, you can perform actions like printing, zooming, and navigating through all pages of the attachment, making it easy to interact with the content as needed.

5.9.   View details for an order

To access the Order details view, you can simply click on the second left button located on the message row. This will open the Order details view, allowing you to delve into the specifics of the order and its associated information.

The Details view includes both header and line values from the order message. This comprehensive view provides you with a complete overview of the information related to the order, including details at both the header and line item levels.

You can easily filter the lines within the Details view through filter activation. To do this, utilize the filter button located to the left on top of the table. This feature allows you to refine and focus on specific data within the order, making it a valuable tool for efficient navigation.
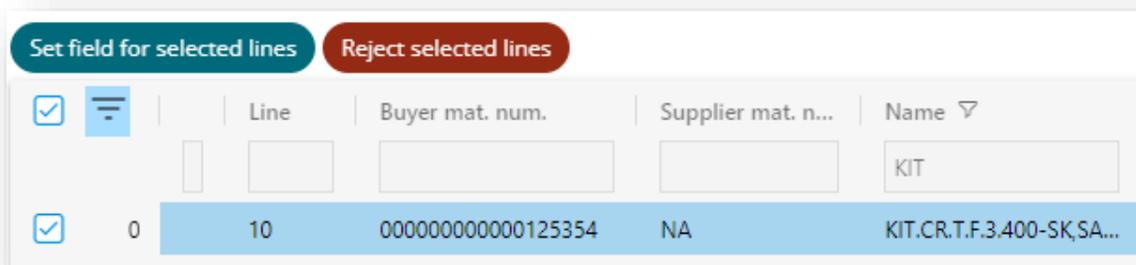
The Log messages feature serves as a valuable tool for tracking and understanding the history and status changes of an order transaction message within the eye-share Portal. To access this feature, simply press the Log message button located in the lower left corner. Doing so will open the Log Message dialog, providing you with a comprehensive view of all actions related to this specific Order message. This information can be particularly useful in gaining insights into the order's current state, any modifications, and, if necessary, identifying and addressing any errors that may have occurred during its processing.
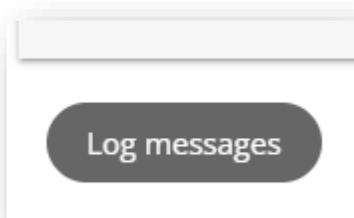
5.10.   Show changes

Within the eye-share Portal, users have the capability to review modifications made to an Order transaction. Specifically, when a new Order is dispatched by the Customer, and the Supplier proposes alterations that are subsequently confirmed by the Customer, these changes can be readily observed within the application.

To access these modifications, users can simply click on the "Show Changes" button. This action allows them to view the adjustments made in the most recent document or transaction, providing valuable insight into the evolution of the Order.

5.11.   Confirm order without changes

When an order sent from the Customer requires no changes, and the Supplier is capable of delivering exactly what is requested, the appropriate action is to confirm the order. This confirmation is carried out by the Supplier by clicking on the green "Confirm" button. This action signifies the Supplier's acceptance of the order as originally specified by the Customer, and it moves the order to a confirmed status within the eye-share Portal.
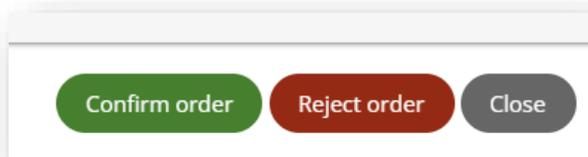
After the Supplier confirms the order by pressing the green "Confirm" button, an additional confirmation step is required. This second confirmation will trigger the immediate transmission of a feedback transaction to the Customer through the PEPPOL infrastructure.

Once this message is successfully sent, the Order message will transition from the "Processing" list to the "Processed" list within the eye-share Portal. At this point, the Order is effectively locked for any future alterations or changes. Any further modifications or updates to this Order must be initiated by the Customer through new messages, ensuring a clear and structured communication process.

5.12.   Reject order

In situations where the Supplier needs to reject an order, they can do so by utilizing the red "Reject" button. This action results in the complete rejection of the entire order. Rejecting an order using this method ensures clear communication of the Supplier's decision to decline the order in its entirety.
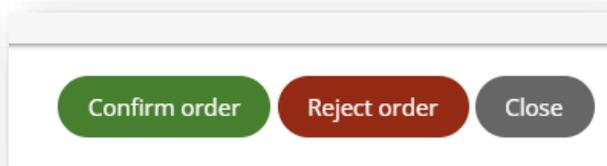
After the Supplier sends the rejection message by clicking the red "Reject" button, the Order message will undergo a status change. Specifically, it will move from the "Processing" list to the "Processed" list within the eye-share Portal.

At this point, the Order is considered rejected, and no further actions will be taken by both the Customer and the Supplier with regard to this specific order.

5.13.   Reject order lines

If the Supplier wishes to reject specific Order lines without rejecting the entire Order, they have the option to do so by marking the lines they intend to reject. This action results in a partial rejection of the Order.

There are two ways to achieve this:

- **Bulk selection:** Users can select a group of Order lines and then choose the "Reject Selected Lines" option.

- **Individual selection:** Alternatively, users can reject individual lines by using the "Rejected" checkbox on each line.

Upon confirming the Order, the system will process the rejection of the selected Order lines accordingly. This functionality provides flexibility in managing Orders, allowing Suppliers to make precise rejections while preserving other parts of the Order.
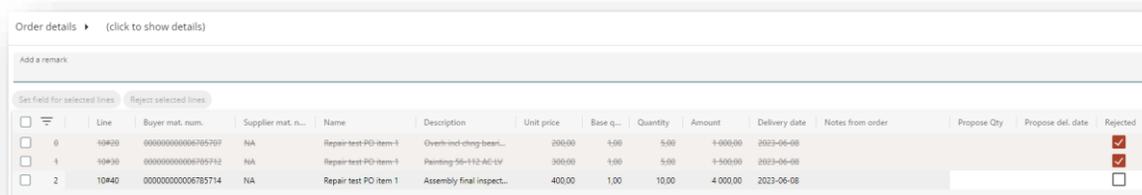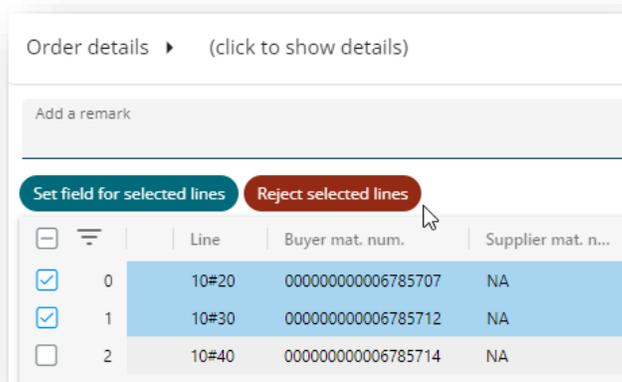
5.14.   Perform order changes

Performing changes to the Customer's order may become necessary in certain situations. Depending on the Customer's setup within the eye-share Portal, the system will permit alterations to be made by the Supplier in specific line fields.

To make changes at the line level, suppliers must use the accessible fields labeled as "Propose...". These fields are designated for proposing modifications to the order, ensuring that any alterations align with the Customer's requirements and preferences while maintaining a structured and controlled change process.

When changes are made to an order message, they will take effect if the user presses the "Confirm" button and sends these modifications back to the Customer. However, it's important to note that the Customer must confirm these changes and send a new message to the Supplier to finalize the altered order.

In cases where the Supplier requests a change, such as a modification in the delivery date before confirming the order back to the Customer, the order confirmation with changes will receive the status of "AcceptedWithChange." This status signifies that the order has been accepted by the Supplier but with pending changes that require confirmation from the Customer.

The Customer's confirmation of the proposed changes made by the Supplier initiates a structured process. This confirmation will result in a new message being generated for the specific Order ID, labeled as "Change." Within this new "Change" message, you will find the modifications made by the Supplier, provided that they have been approved by the Customer.

This approach ensures that any changes to the order are officially acknowledged and documented through a new message, maintaining clarity and transparency in the communication between the Customer and the Supplier within the eye-share Portal.
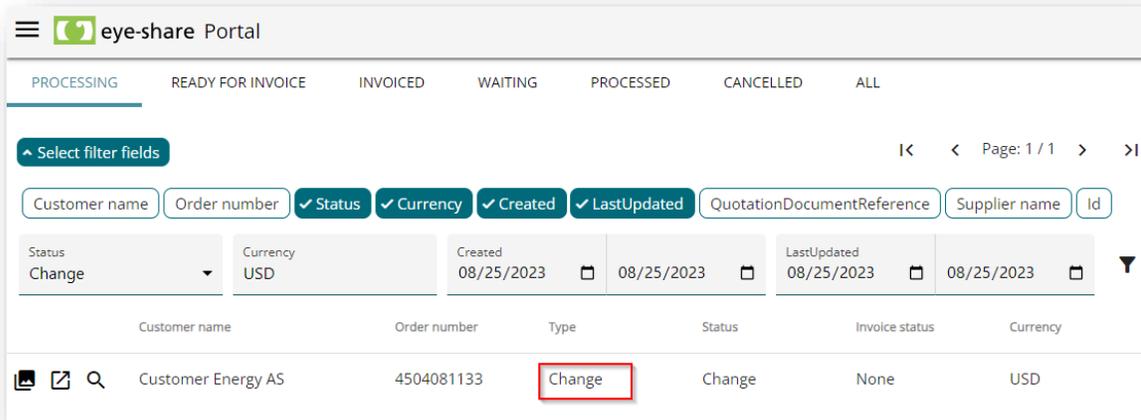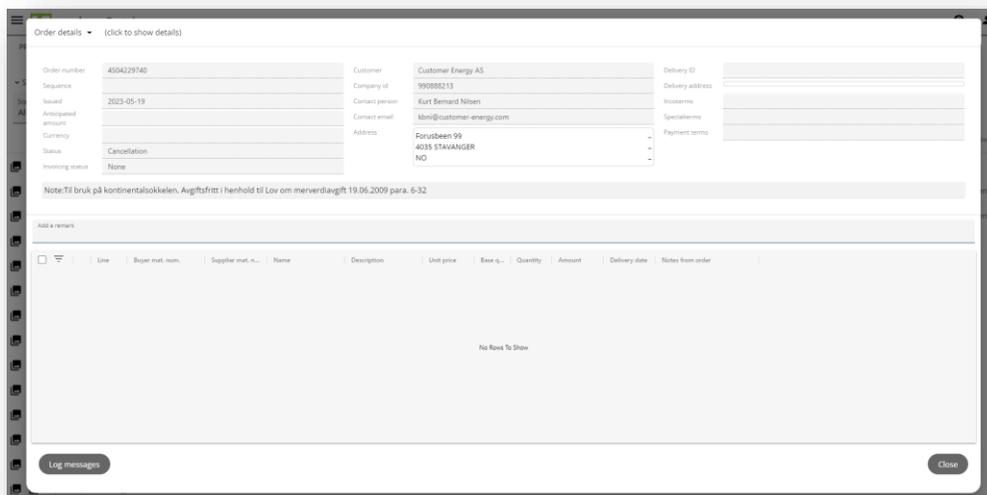
5.15.   Order cancellation

Order cancellations can be initiated by the Customer. When the Customer sends a cancellation message, it will have an immediate effect on all messages associated with the specific Order ID, cancelling them all. These canceled messages, including the Customer's cancellation message itself, will be consolidated and listed under the "Cancelled" category. This process is automated and does not necessitate any action from the Supplier.
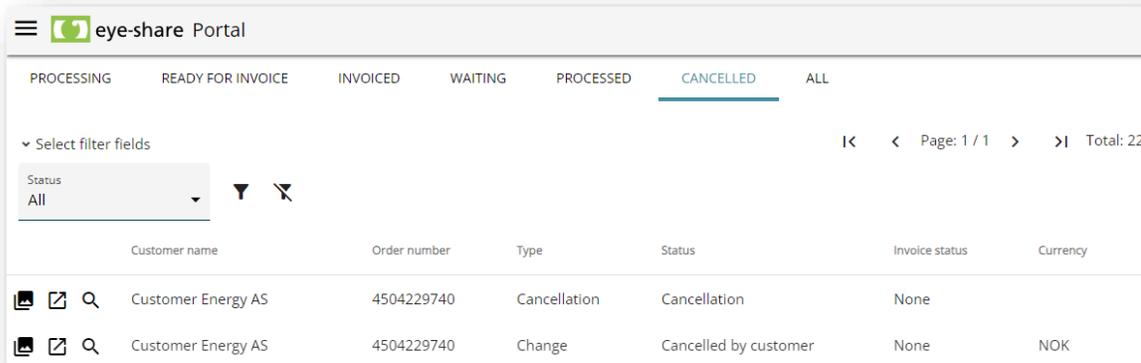
It's important to note that a cancellation message does not contain data related to the original Order message. Instead, it serves solely to cancel the order.

To track and understand the cancellation transaction, the Log message for the cancellation will provide comprehensive information about the cancellation made by the Customer, including details about all the Order messages affected by the cancellation. This ensures transparency and clarity regarding the cancellation process.

5.16. Using the Remark field

On the header level for Order messages, there is a convenient field called "Remark." This field provides users with the flexibility to add information that may be intended for internal purposes or dispatching-related notes.

The value entered in the "Remark" field is retained and saved during actions such as Confirm, Reject, and Close within the detailed view of the order. This feature allows for the inclusion of important notes or context that can be useful for reference or communication throughout the order process..
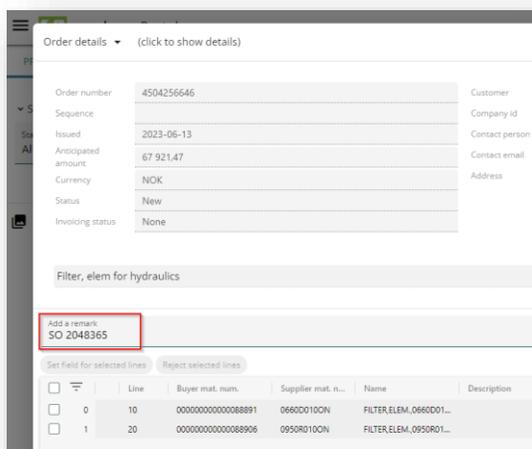
The value entered in the "Remark" field on the header level of Order messages within the eye-share Portal is not only saved but also made readily visible in all list views. Additionally, it can be sorted along with other list columns. This functionality enhances the accessibility and usability of the information contained in the "Remark" field, making it easier for users to reference and organize their order details as needed. The content of the remark field will not be sent to customer.

5.17. Finding orders

For efficient searching and locating of Order messages within the eye-share Portal, the "All" list is the preferred option. This list encompasses all available Order messages accessible to the end-user.

Using the filter fields provided in the "All" list, users have the flexibility to search for Order messages using various parameters. This feature streamlines the process of finding specific orders or narrowing down results based on specific criteria, enhancing the user experience and making it easier to manage and track orders.
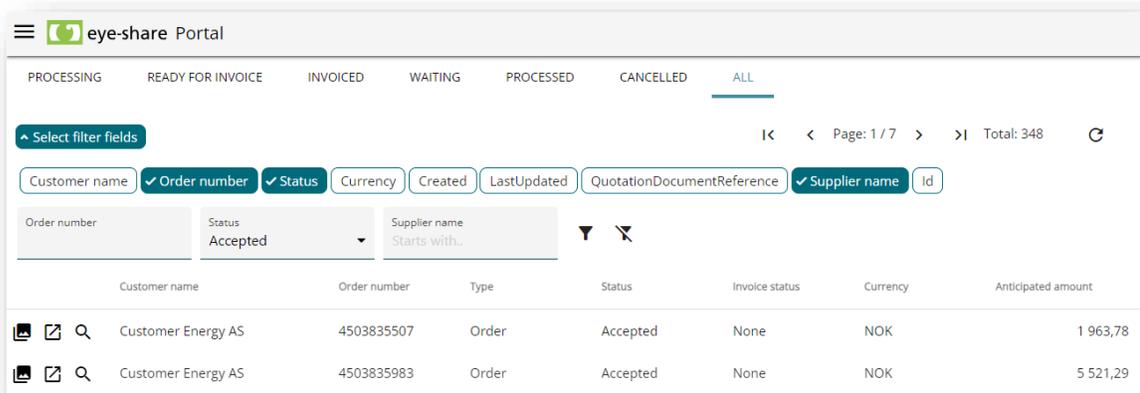
5.18. Sending invoices from Accepted order

The eye-share Portal solution provides the convenience of sending invoices directly from the application, contingent upon the acceptance of orders. This streamlined feature allows users to generate and dispatch invoices based on accepted orders, simplifying the invoicing process within the eye-share Portal.

5.19. Activate order invoicing for supplier account

To utilize the functionality of sending invoices directly from the eye-share Portal, it's essential to activate this feature within the supplier account setup. Activation ensures that the necessary settings and configurations are in place to enable the seamless

generation and transmission of invoices based on accepted orders.
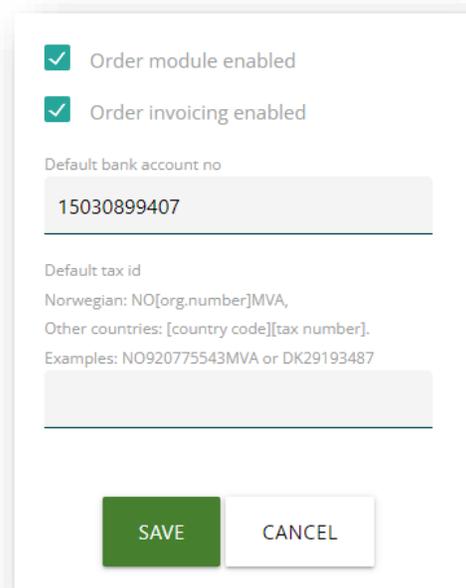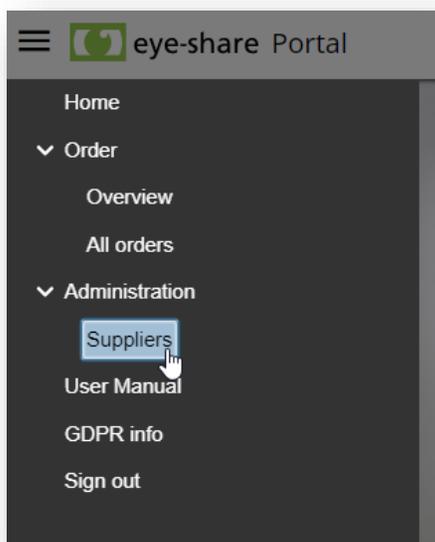
Once the "Order invoicing" option is activated, the eye-share Portal solution will incorporate two new lists into the Order module overview. These lists are designed to facilitate and streamline the invoicing process for users, offering greater visibility and
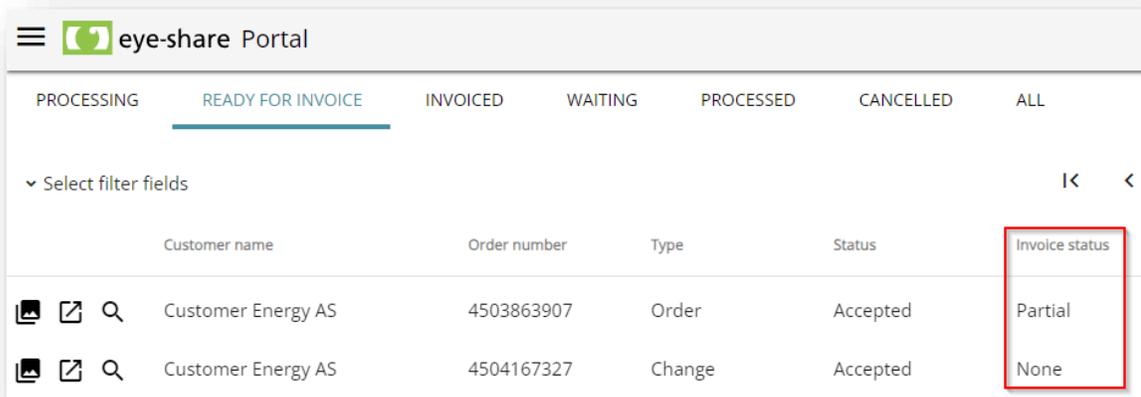
control over orders that are ready for invoicing and those that have already been invoiced.
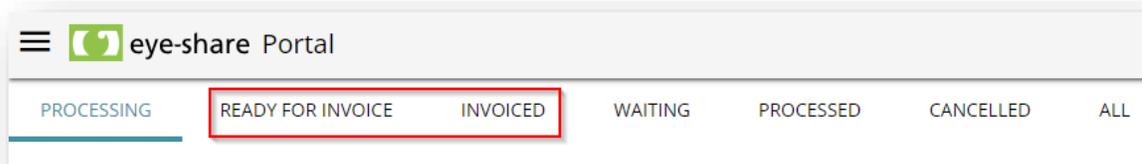
5.20. Ready for invoice

The list "Ready for invoice" in the eye-share Portal displays all orders that are eligible for invoicing. Specifically, it includes only order messages with the status "Accepted."

Furthermore, within this list, you can easily identify whether an order has been partially invoiced by checking the "Invoicing status" column. When an order is fully invoiced, it will be automatically relocated and become visible in both the "Invoiced" and "Processed" lists. This feature ensures a clear and organized overview of the invoicing status for each order and simplifies the management of partially and fully invoiced orders within the eye-share Portal.

5.21. Create invoice from accepted order

To create an invoice from an accepted order in the "Ready for invoice" list, follow these steps within the eye-share Portal:

1. Open the detail view for an order in the "Ready to invoice" list.

2. In the order table, you'll notice new fields related to invoicing:
   - **Invoice now:** The column indicates the quantity of items that should be included in the invoice.
   - **Invoiced:** The column displays the quantity of items that have already been invoiced.

3. By default, the eye-share Portal will suggest invoicing the remaining quantity, which is calculated as "Quantity" minus "Invoiced."

4. You may also need to add additional dimensions, such as Cost type etc. This will vary depending on Customer setup.

It's important to note that it is possible to invoice more than the remaining quantity. However, the portal will issue an alert and highlight the column with a quantity greater than what remains to be invoiced. Despite this alert, it is still possible to create an invoice for the specified quantity, allowing users the flexibility to invoice as needed while being aware of any potential discrepancies between the suggested and actual quantities to be invoiced.

To create an actual invoice within the eye-share Portal, follow these steps:

1. Click the green "Invoice" button.

2. You will receive a notification to inform you if this is the last invoice for the order or not:
   - If it's the final invoice, the order will be moved to the "Invoice" list after the invoice is created.

- If it's not the final invoice and further invoicing is possible, the invoice will be marked as "Partial" and remain in the "Ready to invoice" list for future invoicing.
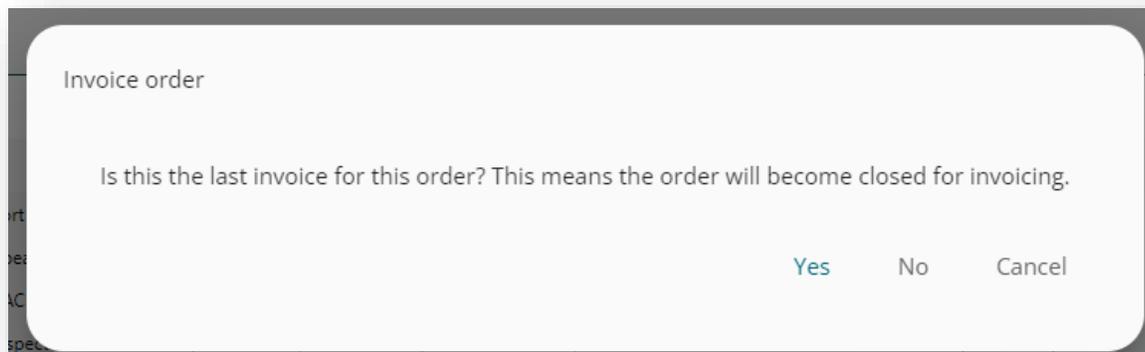
3. Regardless of whether it's the final or partial invoice, except if you choose "Cancel," the invoice registration form will open. Most fields will be prepopulated based on order details, but you must enter an invoice number. You can also add attachments to the invoice, which will be embedded as files within the invoice.
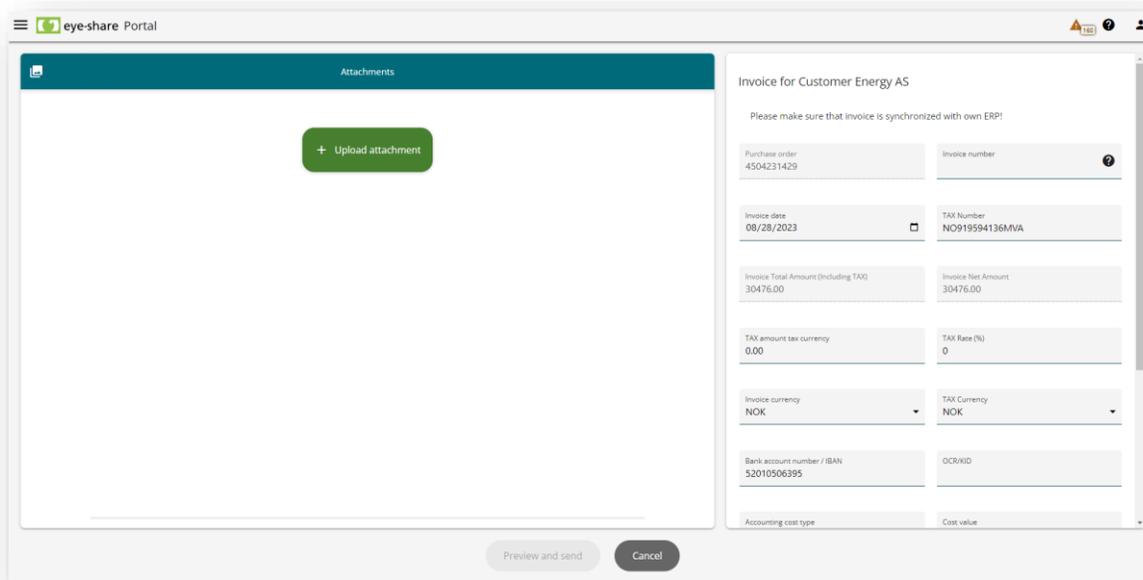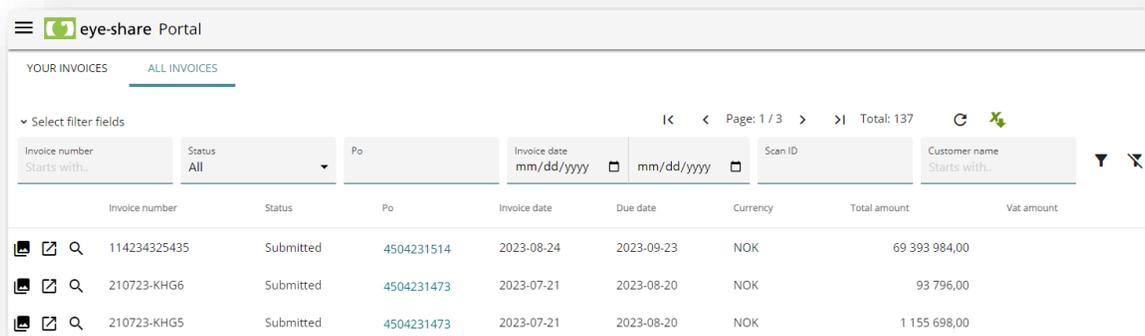

4. After filling in the necessary details, click the green "Send" button. This action will generate the invoice and send it to the Customer through the Peppol infrastructure.

5. You will be directed to the "Invoice overview" automatically. The Invoice overview is also located in the top left menu under "Invoice."

The Invoice Archive displays all invoices created from the Portal. You can open attachments that were sent with the invoice using the attachment button on the left. Additionally, you can open order details to inspect which items are connected to the given invoice. In this list you can also download all registered invoices as a CSV or Excel file.

Clicking the order number will open the order details for that specific order number. Brukeren har ikke tilgang til knappen enable invoicing som vist under på bilde.
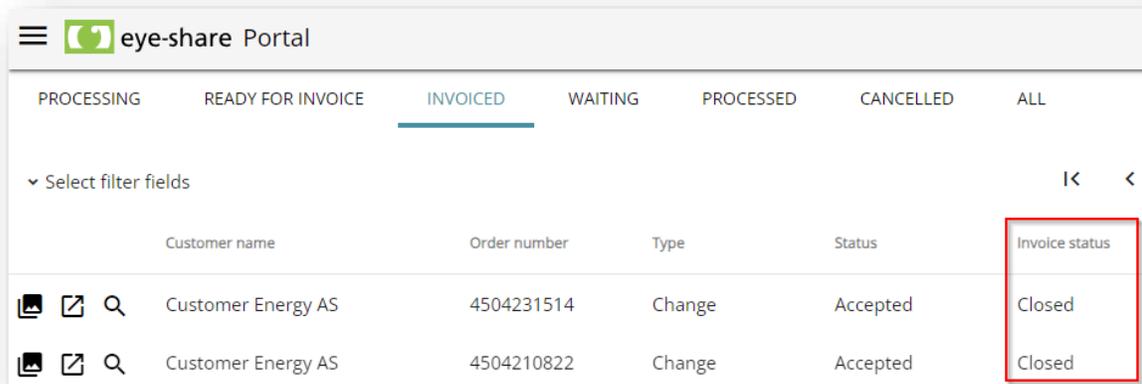

5.22.   Invoiced

The "Invoiced" list in the eye-share Portal provides an overview of all orders that have been fully invoiced and, consequently, closed for any further invoicing. This list is designed to offer a clear and organized view of orders that have completed the invoicing process, ensuring that they are no longer available for additional invoicing actions.

The eye-share Portal still allows users to reopen an order for invoicing if necessary. To do this, follow these steps:

1. Open the order details for the specific order that you want to reopen for invoicing.

2. Within the order details, locate and click the "Enable invoicing" button. Samme gjelder her?
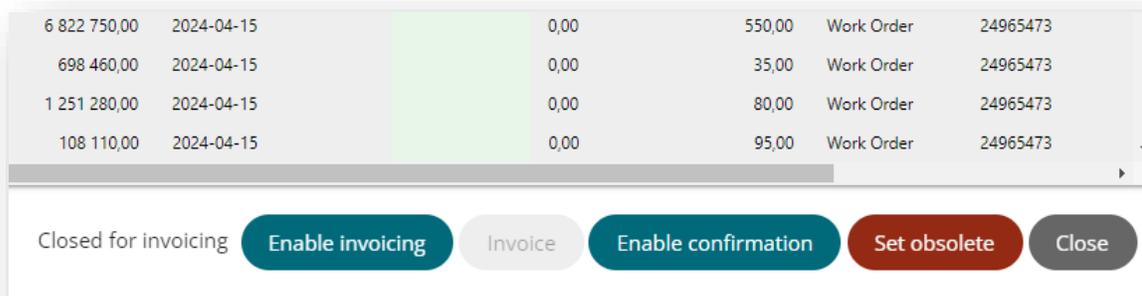
3. The order will be moved back to the "Ready for invoice" list upon confirmation:
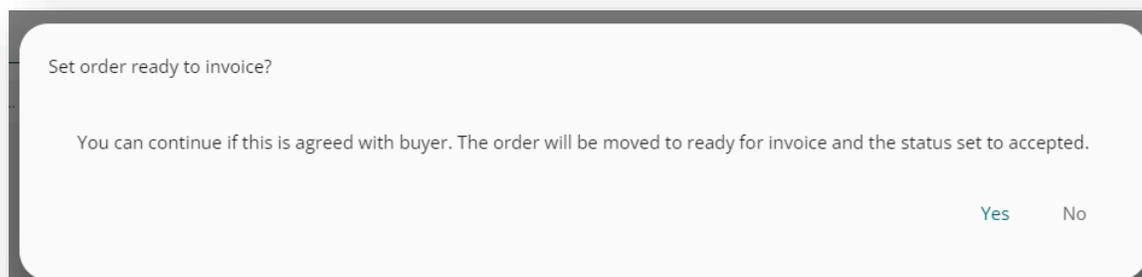
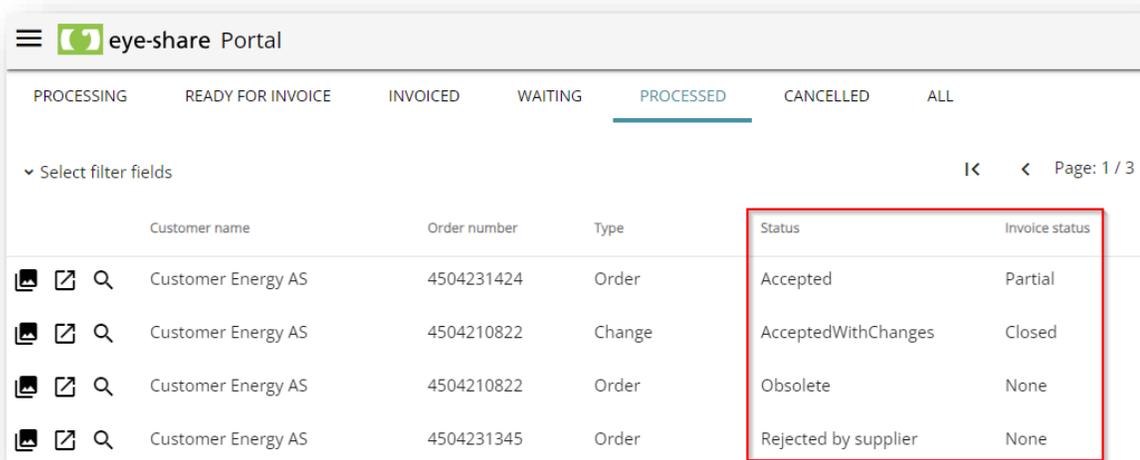4. You can then create an invoice based on this order, as it is once again available for invoicing.

This feature provides flexibility for users to make adjustments and reopen orders for invoicing when needed within the eye-share Portal.

You also have the capability to manually close an order for invoicing, even if the quantity for invoicing is not equal to the ordered quantity. This can be done directly from an Order message within the "Ready for invoice" list. When you manually close the order for invoicing in this manner, the order will be relocated to the "Invoiced" list.

It's important to note the following:

- Orders that are present in the "Invoice" list will also be visible in the "Processed" list.
- The "Processed" list consolidates all transactions that are neither canceled nor currently undergoing processing. This includes completed invoiced orders.

This functionality provides users with control over the invoicing status of orders, allowing them to manually close orders for invoicing as needed within the eye-share Portal.