



# E2E MATERIAL MANAGEMENT

## Handbook - Vendor Onboarding

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Updated: March 2023

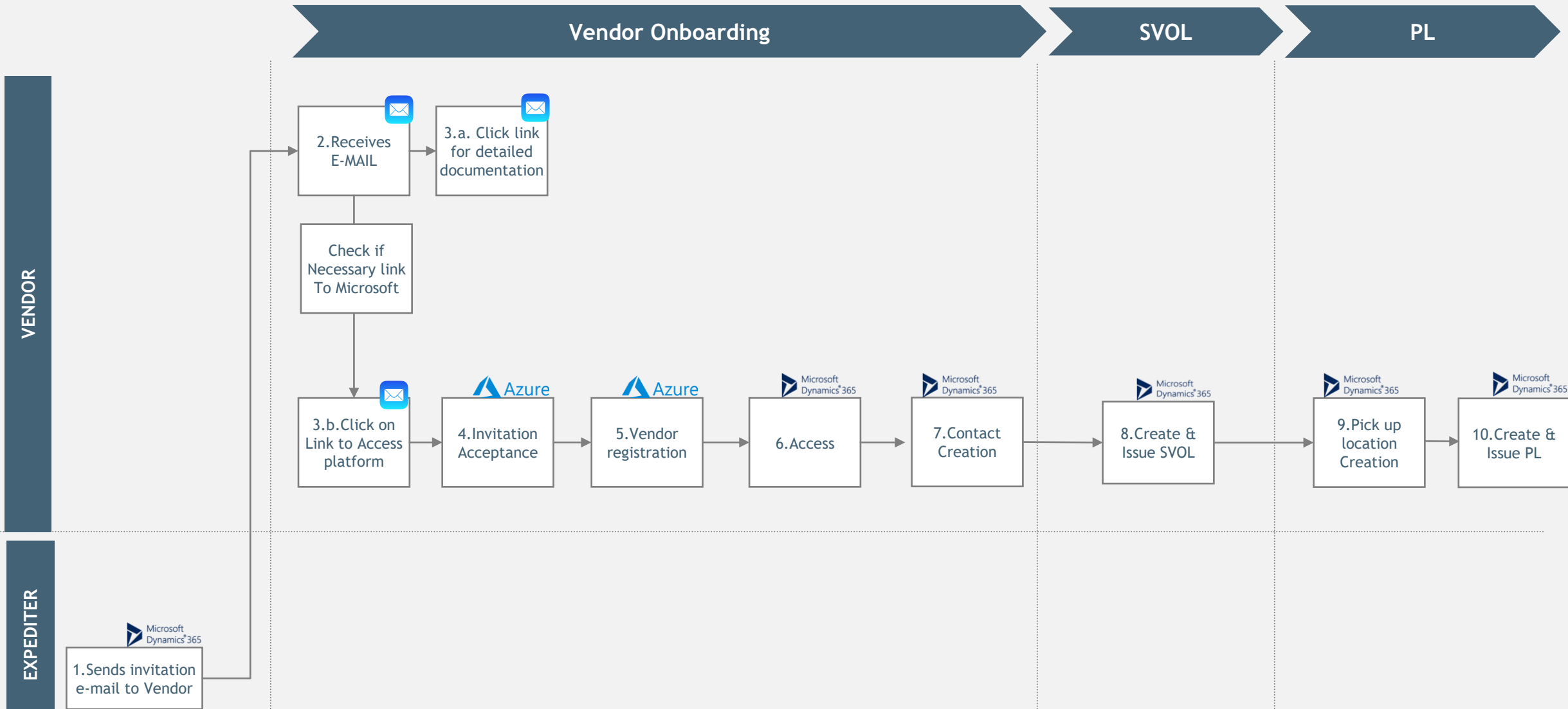


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1. Vendor engagement Workflow
2. Access to Microsoft Dynamics 365
  - 2.1 Check if your account is linked to Microsoft
  - 2.2 Link your account to Microsoft
  - 2.3 Access steps
3. Manage Vendor information

# 1. VENDOR ENGAGEMENT WORKFLOW

# VENDOR ENGAGEMENT WORKFLOW



SVOL: Sub Order Vendor List

# 2.ACCESS TO MICROSOFT DYNAMICS

## 2.1 CHECK IF YOUR ACCOUNT IS LINKED TO MICROSOFT

# CHECK IF YOUR ACCOUNT IS LINKED TO MICROSOFT

Check if the email/account is already registered into Microsoft, or not.

1. Go on this link: <https://account.microsoft.com>

## It's all here with Microsoft account

Your Microsoft account connects all your Microsoft apps and services.  
Sign in to manage your account.

Sign in

2. Click on SIGN IN
3. Insert your email account
4. Click on NEXT

Microsoft  
Sign in  
vendormet73@gmail.com  
No account? Create one!  
Can't access your account?  
Back Next

Sign-in options

The system will verify if your email address is already linked to a Microsoft account and returns an alert

### CASE A

YOUR ACCOUNT IS NOT A MICROSOFT ACCOUNT

Microsoft  
Sign in  
We couldn't find an account with that username. Try another, or get a new Microsoft account.  
vendormet73@gmail.com  
No account? Create one!  
Can't access your account?  
Back Next

➔ See slide 6

### CASE B

YOUR ACCOUNT IS ALREADY A MICROSOFT ACCOUNT

Microsoft  
@gmail.com  
You may already have an account  
@gmail.com is already being used with another Microsoft account. You should sign in with that account.  
If you do not remember your username, recover it now.  
Create the account anyway  
Sign in

➔ See slide 8

## 2.2 LINK YOUR ACCOUNT TO MICROSOFT



# CASE A: CREATE A MICROSOFT ACCOUNT

1. Click on NEXT
2. Choose and insert your password
3. Click on NEXT

Microsoft

## Create account

Looks like you don't have an account with us. We'll create one for you using **vendormet73@gmail.com**.

Next

4. Complete the account
5. Click on NEXT

Microsoft

← vendormet73@gmail.com

## Create account

We need just a little more info to set up your account. Your date of birth helps us to provide you with age-appropriate settings.

Country/region  
Italy

Birthdate  
January 3 1980

Next

6. Enter the code received by email
7. Click on NEXT

Microsoft

← vendormet73@gmail.com

## Create a password

Enter the password you would like to use with your account.

Show password

Next

Microsoft

← vendormet73@gmail.com

## Verify email

Enter the code we sent to **vendormet73@gmail.com**. If you didn't get the email, check your junk folder or [try again](#).

Enter code

I would like information, tips, and offers about Microsoft products and services.

Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Next

8. Follow the steps required
9. Click on NEXT

Microsoft

← vendormet73@gmail.com

## Create account

Please solve the puzzle so we know you're not a robot.

Next

10. The account will be created

Microsoft

← vendormet73@gmail.com

## Create account

Next

11. Automatic redirect to Microsoft home page

Privacy Security Payment & billing Services & subscriptions Devices

Add your name  
vendormet73@gmail.com

Microsoft 365  
Premium Office apps, OneDrive cloud storage, and more

Buy Microsoft 365 Family  
Be more productive - buy Microsoft 365 Family including Word, Excel, PowerPoint, and more.

Get Microsoft 365



NOW AN ACCOUNT MICROSOFT  
HAS BEEN CREATED

PLEASE PROCEED  
FROM THE INVITATION EMAIL

## 2.3 ACCESS STEPS

# ACCEPT THE INVITATION RECEIVED BY EMAIL

1

from [invites@microsoft.com](mailto:invites@microsoft.com)

Click on Accept Invitation

Maire Tecnimont S.p.A. invited you to access applications within their organization Posta in arrivo x

Microsoft Invitations on behalf of Maire Tecnimont S.p.A. <invites@microsoft.com> mar 19 d  
a me ▾

inglese ▾ > italiano ▾ Traduci messaggio

**ⓘ** Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.

Organization: Maire Tecnimont S.p.A.  
Domain: [tecnimont.onmicrosoft.com](https://tecnimont.onmicrosoft.com)

If you accept this invitation, you'll be sent to <https://met-uat.sandbox.operations.dynamics.com>.

[Accept invitation](#)

**Hint:** you might have been already b2b authenticated on Tecnimont Azure farm by means of Digital Documents / FTA usage.

In this case you won't receive this email.

2

from [D365.met.svc@mairetecnimont.it](mailto:D365.met.svc@mairetecnimont.it)

Click on the link at point 2

User created: complete your data request - Maire Tecnimont Group on Microsoft Dynamics 365 Posta in arrivo x

D365\_MET\_SVC\_QUA <D365.met.svc.qua@mairetecnimont.it> mar 19 d  
a me ▾

Dear User,

You've been registered on Maire Tecnimont Group solution for Material Packing List management running on Microsoft Dynamics 365.

Please follow below steps:

1. Accept invitation of the previous e-mail from Microsoft Invitations on behalf of Maire Tecnimont S.p.A. ([invites@microsoft.com](mailto:invites@microsoft.com))
2. Click here <https://met-uat.sandbox.operations.dynamics.com> to access the platform;
3. Upon first access, complete your account details;
4. For further accesses log in with your credentials.

Need help? Check out the online documentation here. [\[hyperlink\]](#)

Maire Tecnimont Group is leading the Supply Chain transformation on the EPC industry integrating process with collaboration as main driver.

You are receiving this email because Maire Tecnimont Group has identified you as the appropriate contact for this correspondence.

For further queries contact your Expediter on Maire Tecnimont Group

# AUTHENTICATE THE ACCOUNT

## AUTHENTICATE YOUR MICROSOFT ACCOUNT

1. Click on ACCEPT:

**Microsoft**  
d365plvendor@gmail.com

Review permissions

Maire Tecnimont S.p.A. tecnimont.onmicrosoft.com

**This resource is not shared by Microsoft.**

The organization Maire Tecnimont S.p.A. would like to:

- ✓ Sign you in
- ✓ Read your name, email address, and photo

You should only accept if you trust Maire Tecnimont S.p.A.. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **Maire Tecnimont S.p.A. has not provided a link to their privacy statement for you to review.** Maire Tecnimont S.p.A. may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/tecnimont.onmicrosoft.com>

Cancel **Accept**

2. click on NEXT:

**Microsoft**  
d365plvendor@gmail.com

**More information required**

Your organization needs more information to keep your account secure

[Use a different account](#)

[Learn more](#)

**Next**

3. Choose how to authenticate safely and click confirm:  
If Authenticator app is not available we suggest to use “a different method option” to use the SMS by phone.

**Keep your account secure**

Your organization requires you to set up the following methods of proving who you are.

Microsoft Authenticator

Start by getting the app

On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose "Next".

[I want to use a different authenticator app](#)

**Next**

[I want to set up a different method](#)

**Choose a different method** ✕

Which method would you like to use?

Phone

Cancel **Confirm**

4. Complete with your phone number and click NEXT: you'll receive a verification code.

**Keep your account secure**

Your organization requires you to set up the following methods of proving who you are.

Phone

You can prove who you are by texting a code to your phone.

What phone number would you like to use?

Italy (+39) 3338621632

Text me a code

Message and data rates may apply. Choosing Next means that you agree to the [Terms of service](#) and [Privacy and cookies statement](#).

**Next**

[I want to set up a different method](#)

Phone

We just sent a 6 digit code to +39 3338621632. Enter the code below.

129435

[Resend code](#)

Back **Next**

5. Follow the automatic steps until you log in into D365

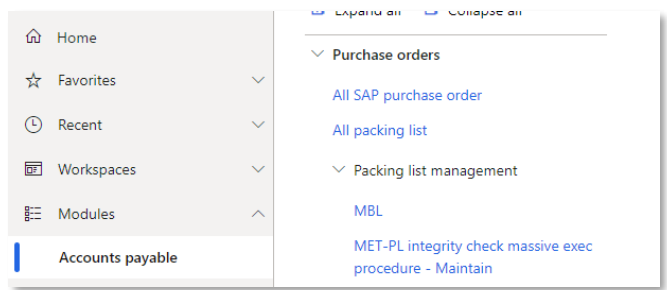
# D365 HOMEPAGE - NAVIGATION TIPS



ACCESS - RECOMMENDED BROWSER: GOOGLE CHROME & EDGE - Secured access guaranteed by SSO

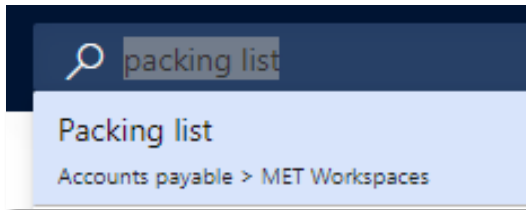
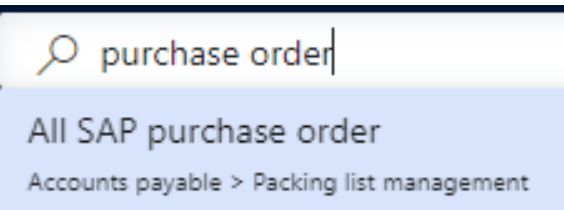
## Main Menu - Section of interest:

MODULES > “Account Payable” to access Purchase Orders & Packing List  
Mark the star for your “Favorites”

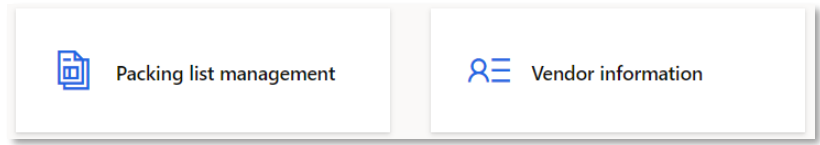


## Quick search bar & tile

Quick search of content by free text typing:



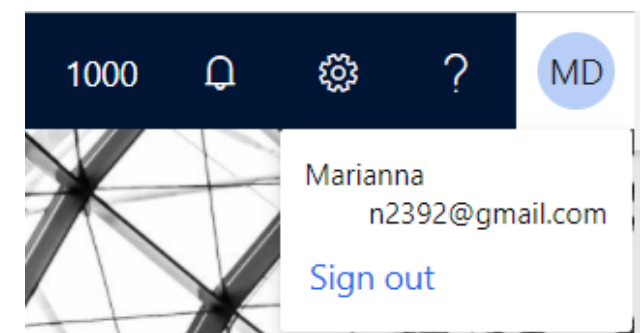
Quick access WORKSPACE TILE



## User’s account features

**Bell icons:** shows the activities done and documents ready to be downloaded.

**Settings icon:** allows to custom the view



# 3.MANAGE VENDOR INFORMATION

# VENDOR INFORMATION: CHECK & CREATE CONTACTS 1/4

ACCESS VENDOR INFORMATION: Click on the Workspace tile on the dashboard

**MOSTOSTAL KRAKÓW S.A.**

Address

0 User requests

5 Pick up location

Email address

Telephone

18 All contacts

5 Users

## MENU OVERVIEW:

### ALL CONTACTS

View details of each contacts already created and related activation status

### USERS

All active contacts

### USER REQUESTS

All users required for provisioning

### PICK UP LOCATION

List of Pick up locations already inserted

Vendor information

All contacts

Filter

	Name	Personal title	Primary email	Email (user alias)	User account a...	
Users	Carlo Giuseppe I Secci		carlo.giuseppe.secci@ava...			
User requests	Carlo Secci		CarloSecci@robertopontiggia.o...			
	Carlo Secci					
	Davide Persico		davide.persico@robertopontigg...	davide.persico@robertopontigg...		

Users

	Name	Email	Vendor account	Name	
User requests	Elena Chiarati	el.chiarati@	0000055115	MOSTOSTAL KRAKÓW S.A.	
	Slawomir Radecki	Slawomir.Radecki@VendorMET...	0000055115	MOSTOSTAL KRAKÓW S.A.	
	Vendor Gmail MET	VendorMET001@gmail.com	0000055115	MOSTOSTAL KRAKÓW S.A.	
	Vendor Outlook MET	VendorMET001@outlook.com	0000055115	MOSTOSTAL KRAKÓW S.A.	
	Marianna De Rosa	maryn2392@	0000055115	MOSTOSTAL KRAKÓW S.A.	

Users

	Request ID	Request action	Email	Name	Status
User requests					

We didn't find anything to show here.

Pick up location

Filter

Pick-up location id	Name
PUL00000008	MOSTOSTAL KRAKÓW S.A.

Setup

Sub vendor: No, Vendor account: 0000055115

Addresses

Name or description	Address	Purpose	Primary
MOSTOSTAL KRAKÓW S.A.	ul. Miłanina 5 97-410 Zdobnica, Kleszczow POL	Pick-up location	Yes

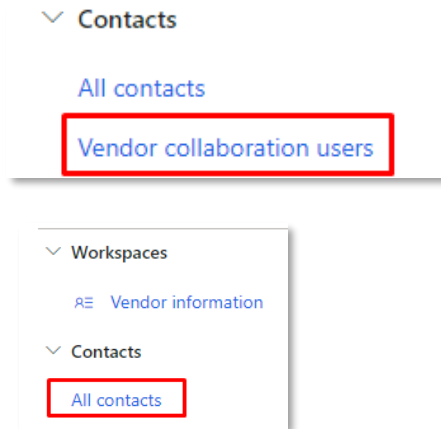
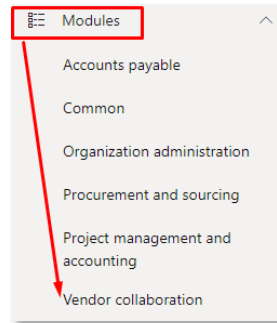
After 2 months without activity, Vendor Users are deactivated.

User account activated

No

# VENDOR INFORMATION: CHECK & CREATE CONTACTS 2/4

1. ACCESS VENDOR COLLABORATION: choose All contacts



Name	Personal title	Primary email	Email (user alias)	User account a...	Vendor	Vendor name	Vendor admin
Carlo Giuseppe I Secci		carlo.giuseppe.secci@t...		0000055115		MOSTOSTAL KRAKÓW S.A.	
Carlo Secci		CarloSecci@robertopontiggia.o...		0000055115		MOSTOSTAL KRAKÓW S.A.	
Carlo Secci				0000055115		MOSTOSTAL KRAKÓW S.A.	
Davide Persico		davide.persico@robertopontigg...	davide.persico@robertopontigg...	0000055115	✓	MOSTOSTAL KRAKÓW S.A.	✓
Davide Persico		dav.persico90@...		0000055115		MOSTOSTAL KRAKÓW S.A.	
Elena Chiarati		elena.chiarati@robertopontiggi...	elena.chiarati@robertopontiggi...	0000055115	✓	MOSTOSTAL KRAKÓW S.A.	✓
Elena Chiarati 2		el.chiarat...		0000055115		MOSTOSTAL KRAKÓW S.A.	
Mario Rossi	Dr.			0000055115		MOSTOSTAL KRAKÓW S.A.	

2. CREATE NEW CONTACT

- Select NEW on the top page
- Complete the form
- Select your company
- Click on CREATE to finalize

A screenshot of the 'Create contact persons' form. At the top, there are buttons for 'Edit', '+ New' (highlighted with a red box), and 'Delete'. Below are input fields for 'First name', 'Middle name', 'Last name', and 'Personal title'. At the bottom, there is a 'Setup contact for' section with a table of vendor accounts and a 'Create' button highlighted with a red box.

3. COMPLETE THE REQUIRED ATTRIBUTES

- Select ADD
- Choose field type "phone", "email"
- Set primary flag (for main contact)
- SAVE

4. EDIT THE CONTACT

- Select the user
- Click on EDIT
- Update the details
- SAVE



A screenshot of the contact details form for 'Elena Chiarati 2'. It shows 'Contact person details' and 'Contact information' sections. In the 'Contact information' table, the 'Primary' checkbox is highlighted with a red box. A 'Save' button is also visible.



5.

## CHANGE VENDOR CONTACT ROLE: to assign ADMINISTRATOR

- a) On menu USERS: select the user & EDIT
- b) Select “Maintain vendor user roles”

The screenshot shows a user management interface. At the top, there are several action buttons: 'Edit', '+ New', 'Delete', 'Provision vendor user', 'Inactivate vendor user', 'Maintain vendor user roles' (highlighted with a red box), and 'Options'. Below this is a 'Page options' section with a 'Go to' dropdown. The main content area shows a user profile for 'Mario Rossi' with a 'Contacts' tab selected. Under 'Contact person details', there are input fields for 'First name' (containing 'Mario'), 'Middle name', and 'Last name' (containing 'Rossi').

- c) Update the current role and provide mandatory justification field

The screenshot shows the 'Maintain vendor user roles' form. It is divided into two main sections: 'Contact person details' and 'USER SETUP'. The 'Contact person details' section includes fields for 'First name' (Mario), 'Middle name', and 'Last name' (Rossi). The 'USER SETUP' section includes fields for 'Email (user alias)' (mario.rossi@prova.ik) and 'Language' (en-US). A 'Business justification' field is highlighted with a red box, and a red arrow points downwards from it.

- d) Submit

The screenshot shows a 'Maintain user roles' dialog box. It contains a table with two columns: 'Role description' and 'Assign'. The first row is 'MET-Material vendor user (Admin...)' with a checked checkbox. The second row is 'MET-Material vendor user (Ext...)' with an unchecked checkbox. A red box highlights the first row. A red arrow points from the bottom right of the dialog box to the 'Submit' button.

Role description	Assign
MET-Material vendor user (Admin...)	<input checked="" type="checkbox"/>
MET-Material vendor user (Ext...)	<input type="checkbox"/>

# VENDOR INFORMATION: CHECK & CREATE CONTACTS 4/4

## 6. DELETE CONTACT CREATED:

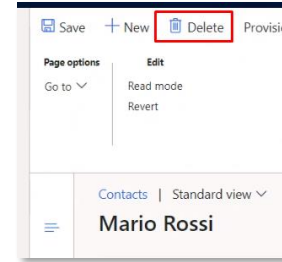
a) Select a CREATED CONTACT

Standard view

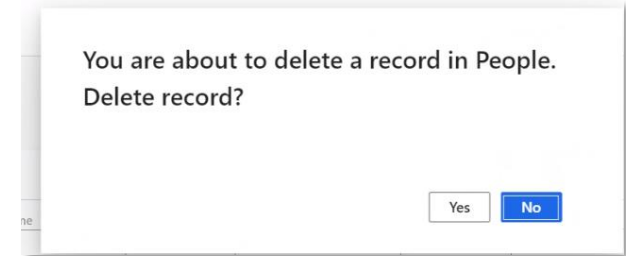
Filter

Name	Personal title	Primary email	Email (user alias)	User account a...
g g g	Mr.	a		
Marianna De Rosa	Miss	maryn2392@	maryn2392@	✓
Mario Rossi	Dr.			
Mario Rossi				
Mario Rossi				

b) Click on the Delete icon on the top



c) An alert message asks confirmation



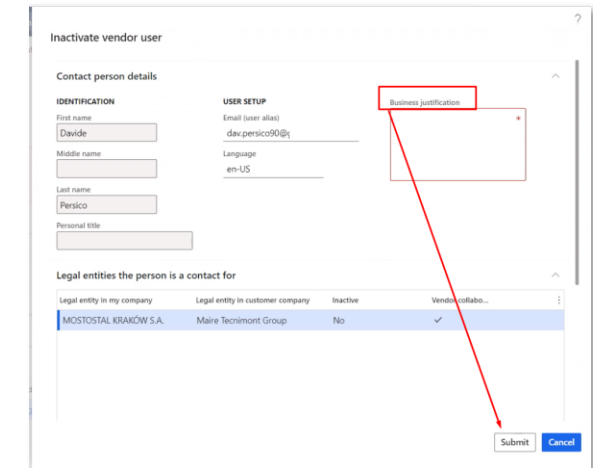
## 7. INACTIVATE USER PROVISIONED

a) Select a PROVISIONED USER (Activated)

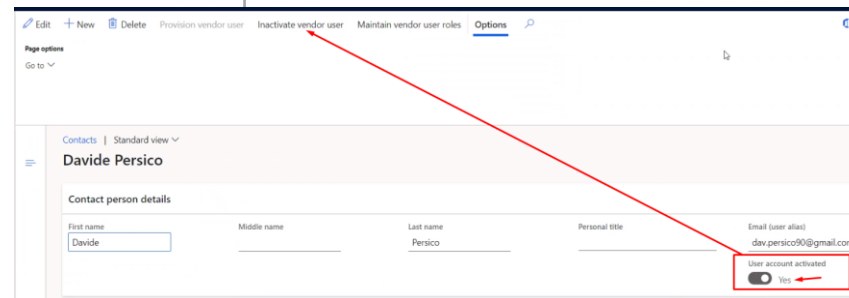
Name	Personal title	Primary email	Email (user alias)	User account a...
g g g	Mr.	a		
Marianna De Rosa	Miss	maryn2392@	maryn2392@	✓

b) Click on "Inactivate vendor user on the top

c) Apply a business justification and submit



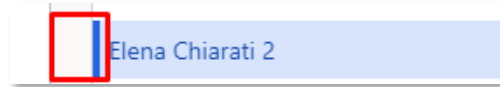
**TO REACTIVATE A USER:**  
Follow the steps of section:  
"VENDOR INFORMATION: PROVISION A USER"



# VENDOR INFORMATION: PROVISION USER

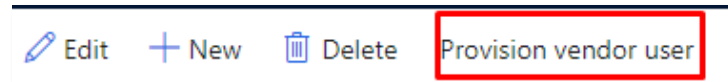
## PROVISION A NEW USER

a) Select the user from the list



b) Click on Provision vendor user

c) Complete the mandatory field: Business justification



### Provision vendor user

#### Contact person details

##### IDENTIFICATION

First name

Middle name

Last name

Personal title

##### USER SETUP

Email (user alias)

Language

##### Business justification

Required

d) Legal entities: Flag the Vendor collaboration

Legal entities the person is a contact for				
	Legal entity in my company	Legal entity in customer company	Inactive	Vendor collabo...
	MOSTOSTAL KRAKÓW S.A.	Maire Tecnimont Group	No	<input checked="" type="checkbox"/>

e) Assign user roles: Flag one option: "admin" user will be able to create further users on its organization.

### Assign user roles

Role description	Assign
MET-Material vendor user admin (External)	<input checked="" type="checkbox"/>
MET-Material vendor user (External)	<input type="checkbox"/>

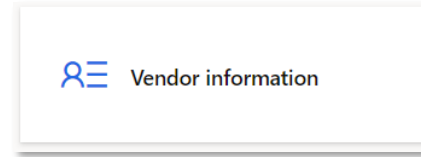
f) Submit



After the Provisioning the contact receives an onboarding email with the instructions to access.

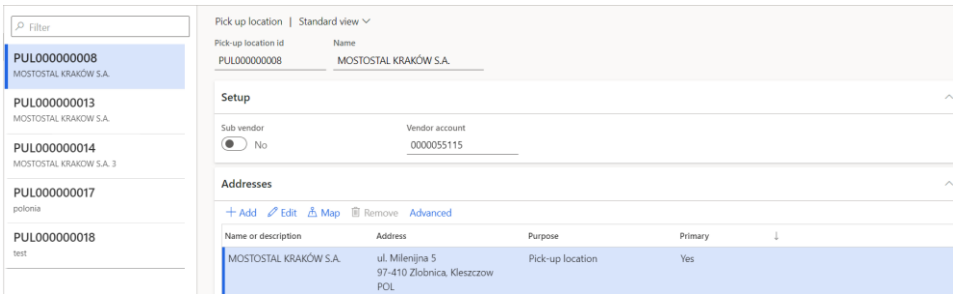
## 1. ACCESS VENDOR INFORMATION

Click on the Workspace tile on the dashboard “Vendor information”  
Click on Pick up location tile.



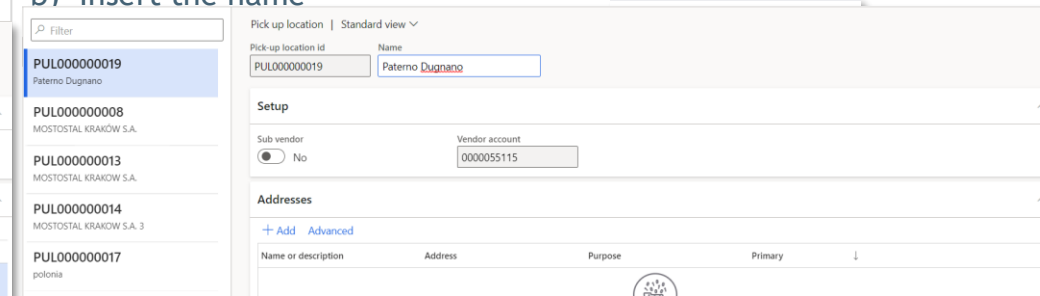
## 2. VIEW PICK UP LOCATION

Access the list of Pick up locations already inserted



## 3. CREATE NEW PICK UP LOCATION

- a) Select NEW on the top page
- b) Insert the name



- c) “Add” to complete the form with the required fields
- d) Flag as “Primary”
- e) Click on OK



**New address**

Location ID  
000003329

Name or description  
Paterno Dugnano

Purpose  
Pick-up location

Country/region  
\*

ZIP/postal code  
\*

Street  
\*

Street number

Building complement

Post box

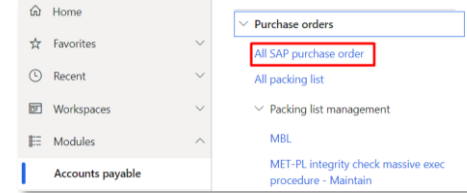
OK Cancel



Please do not leave any row empty when you fill in the Street address

## 4. ACCESS ALL PURCHASE ORDER AREA

Click on the Main Menu on “Account payable”



## 5. SEARCH & VIEW CONTENT

Select the PO by clicking on PO number

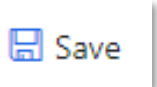
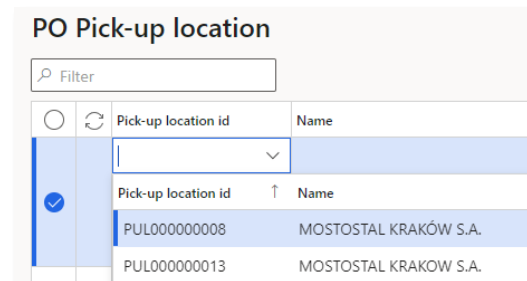
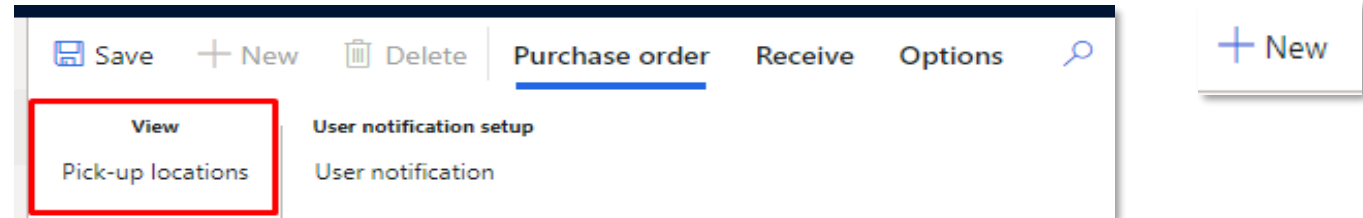
All SAP purchase order | Standard view

Filter

Purchase order	Vendor account	Vendor name	Project ID	Purchase type	Approval status
7500066747	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Purchase order	Approved
7500066765	0000055115	MOSTOSTAL KRAKÓW S.A.	4112	Purchase order	Confirmed
7500066769	0000055115	MOSTOSTAL KRAKÓW S.A.	3971	Purchase order	Confirmed

## 6. ASSOCIATE PUL WITH PO

- a) Click on «Pick up locations» on the top left page
- b) Click on New on the top left page
- c) Select Pick-up location id from drop down list
- d) Click Save





**Maire  
Tecnimont**