



# SFERA Tutorial

Once you log in, you will see an initial screen **in the middle of the screen called the “Dashboards”**.

There you can find more information **about SFERA and contacts**.

On the left side, **you can see three different tabs** based on **different actions** they can run. Each of them **can contain multiple subtabs as well**.

### Organization and users

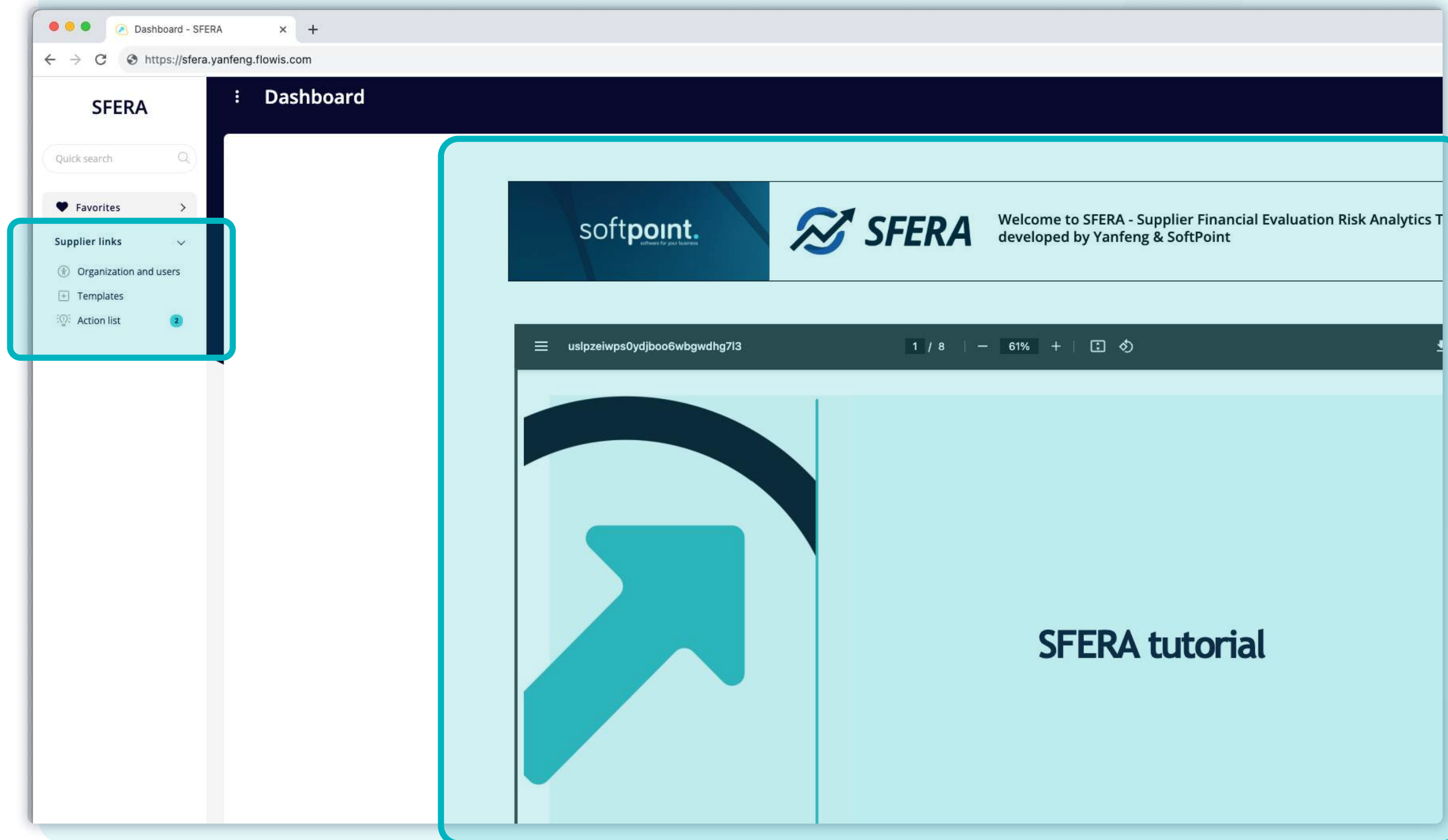
- Information about your organization, users, and options to update them.

### Templates

- You can load your financial data and see previous loads.

### Action list

- Incomplete company profile or missing financial data or audit reports which are required by Yanfeng.



# How to update supplier data

The screenshot shows the SFERA web interface for updating supplier data. The browser address bar shows the URL: [https://sfera.yanfeng.flowis.com/c/update\\_supplier\\_data/new?draft=0&transaction%5Btransaction\\_type\\_id%5D=2](https://sfera.yanfeng.flowis.com/c/update_supplier_data/new?draft=0&transaction%5Btransaction_type_id%5D=2). The page title is "Update supplier data". The left sidebar contains the SFERA logo, a search bar, and a menu with items: Favorites, Supplier links, Organization and users (highlighted), Templates, and Action list (with a notification badge). The main content area has a breadcrumb "Organization and users" and a tab "Update supplier data" (highlighted). Below the breadcrumb is a "Supplier data" section with the following fields: Supplier (9030532 - Automatic Spring Products Corporation - Grand Haven, US, highlighted), Legal name \* (Automatic Spring Products Corporation), Street \* (803 Taylor Avenue), Code \* (9030532), City \* (Grand Haven), Postcode \* (49417), VAT Number \* (474632839), and Country \* (US - United states). To the right is a "Profile questions" section with fields: Current supplier? \* (Select an option), Private or Public \* (Select an option), Minority owned? \* (Select an option), Industries supported \* (Select an option), OEMs \* (Select an option), Year business started \* (empty), Reporting level \* (Select an option), Unionized location? \* (Select an option), Supplied regions \* (Select an option), and Fiscal year end \* (empty). At the bottom center, a green "Submit" button is circled in red.

Go to "Organization and users" and then select "Update supplier data" from the list above.

Choose your organization in "Invited supplier"



Update desired fields



Submit data

# How to add or remove users

The screenshot shows the SFERA web application interface for adding or removing users. The browser address bar shows the URL: [https://sfera.yanfeng.flowis.com/c/add-remove\\_users/new?draft=0&transaction%5Btransaction\\_type\\_id%5D=2](https://sfera.yanfeng.flowis.com/c/add-remove_users/new?draft=0&transaction%5Btransaction_type_id%5D=2). The page title is "Add/Remove users".

The interface is divided into several sections:

- Supplier:** A text input field containing "9030532 - Automatic Spring Products Corporation - Grand Haven, US".
- Existing users:** A section with "Authorized users" (SFERA Tester, Andrea Smith) and "Users to remove" (SFERA Tester (sfera.test@mycompany.com) [sfera.test@mycompany.com]).
- New users:** A form with "Name of user \*" (New User) and "Email \*" (newuser@sfera.yfa.com). A green "Submit" button is located below this form.

Red annotations highlight the "Add/Remove users" tab, the "Supplier" field, the "Users to remove" field, the "New users" form, and the "Submit" button.

Go to "Organization and users" and then select "Add/Remove users" from the list above.

Choose your organization in "Invited supplier"



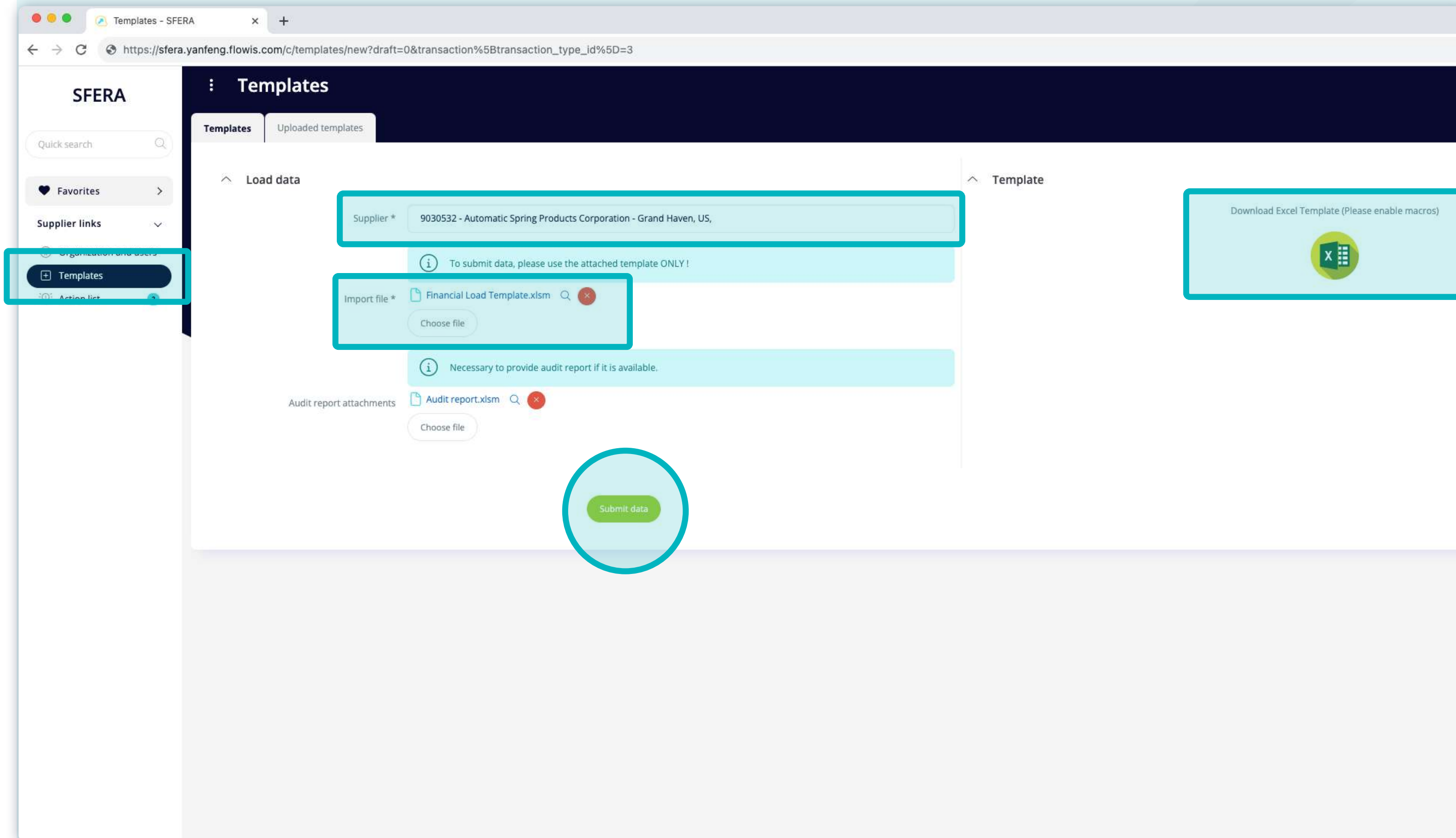
Choose users to remove in "Users to remove" or add users to create "New users"



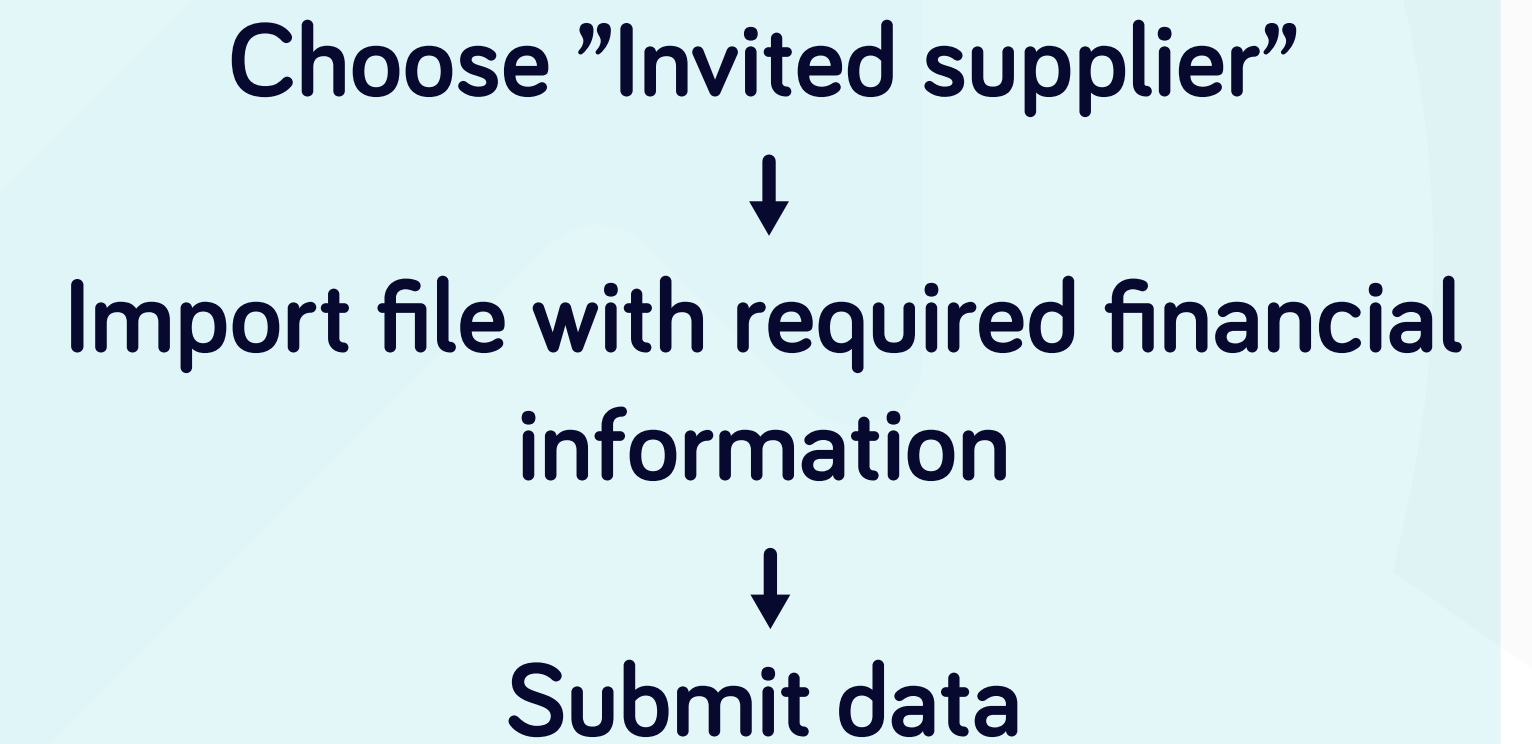
Submit



# How to load financial information



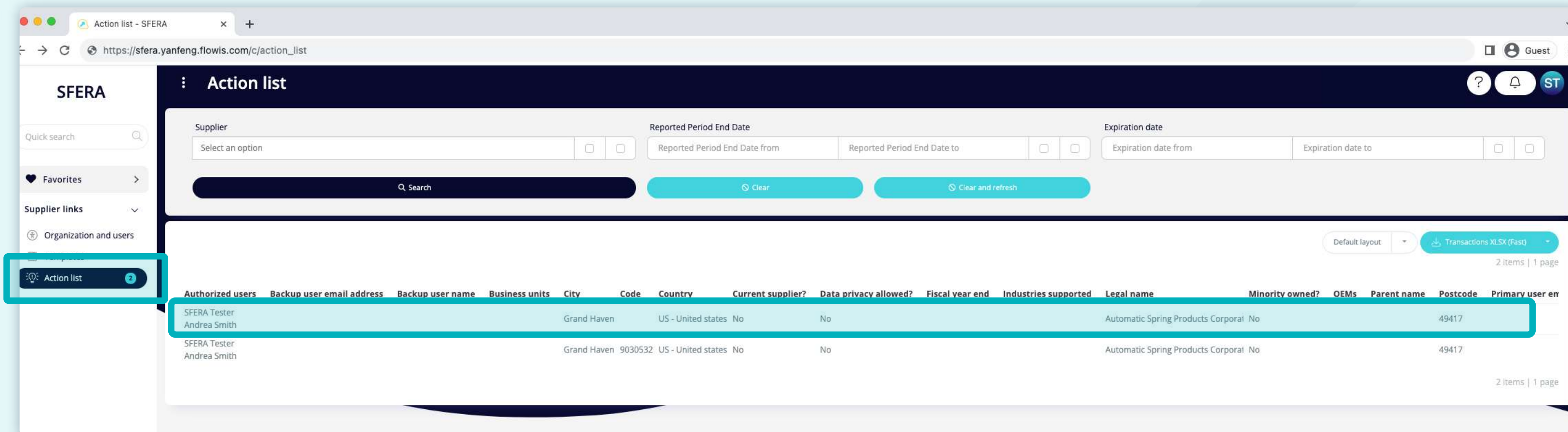
Go to **“Templates”** and then select **“Templates”** from the list above.



**(Note)**

*In case you need the right financial template for your supplier, click on the Excel icon on the right to download one.*

# How to provide missing information



Go to "Action list" and then select the desired record you want to provide information for.

Open a record



Scroll down



Provide needed information



Submit

The screenshot shows the 'Complete profile questions' form. It contains several questions with dropdown menus and text input fields. A red circle highlights the 'Complete profile questions' button at the bottom.

Complete profile questions

Are you a current supplier to Yanfeng? \*

What business unit you are delivering to? \*

Are you a public or private company? \*

Are you a minority owned enterprise? \*

What industries do you support? \*

Top 5 OEM customers. \*

Year business started? \*

What reporting level is represented by the financial data you are providing? \*

Are any of your production locations unionized? \*

What region(s) do you supply for Yanfeng? \*

When fiscal year ends? \*



At SoftPoint we also address **other key finance processes** such as:



## General ledger

- **Fixed assets:** fixed assets register, multiple books (e.g. GAAP, statutory, tax, etc.), different depreciation methods, and handling of acquisitions, disposals, and transfers.
- **Intercompany:** submission of exchange requests, routing, and approval, simultaneous posting to various ERP systems, reconciliation of intercompany balances, and payment approval.
- **Account reconciliations:** reconciliation cover sheets and balance explanations, auto-reconciliations, routing and approval, and integration with accounting software.
- **Lease accounting:** IFRS 16 requirements, lease obligations, and calculation of BS / PL balances.
- **Manual journals:** routing & approval, and automated recurring journals.
- **GL reporting**

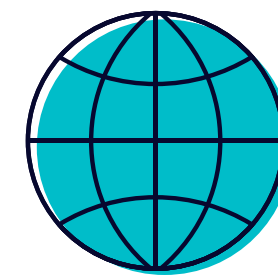


## Accounts receivable

- **Cash application:** matching customer payments with open items, automated breakdown of payments with remittances, and routing of discrepancies to relevant business owners.
- **Billing:** processing of billing requests and automated billing.
- **Business teams:** the resolution of discrepancies, submission of billing requests, and cash-flow forecasting.
- **AR reporting.**

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