REGISTRATION AND PROFILE MANAGEMENT

SUPPLIER NETWORK AND CUSTOMER PORTAL PROFILES

JAGGAER SUPPLIER NETWORK PORTAL

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Introduction

The purpose of this Registration and Profile Overview quick guide is to provide you with the key activities associated with registering as a user in the JAGGAER Supplier Network and managing your network profile. This guide also contains information about registering with specific customers and managing a customer-specific profile through the JAGGAER Supplier Network. This guide contains the basic process for:

- Registering and logging in to the JAGGAER Supplier Network.
- Managing your network profile.
- Registering and logging in to a customer portal.
- Managing your customer profile.

JAGGAER Supplier Network

The JAGGAER Supplier Network is your connection to all JAGGAER customers. Through the network, you can manage basic business profile information, upload content and pricing, and access customer purchase orders. You may invoice some customers and communicate via those invoices. Reports are also available, which display information about enablements with customers as well as transaction information.

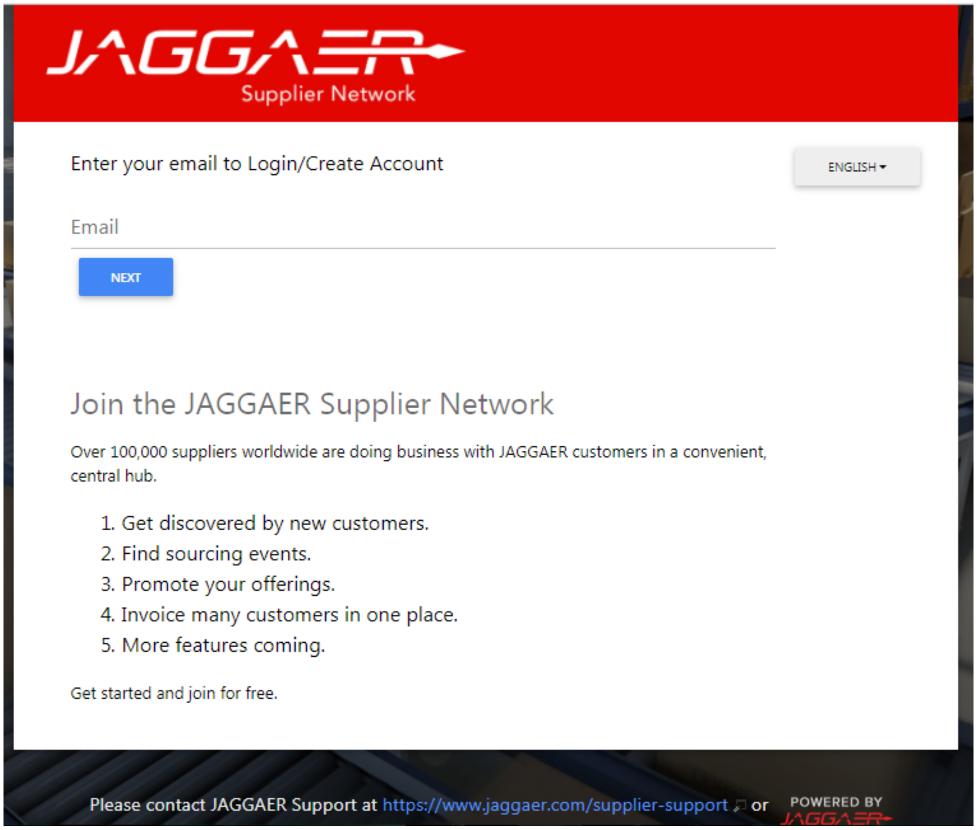
Along with the basic business profile information that is available to the global network, you may have access to customer-branded portals where you can manage information specific to that customer. The customer-branded portals may allow you to identify specific profile information and manage invoices for the specific customer. The Supplier Network makes providing both global and customer-specific information easily accessible from one location, using one login

Logging into the Supplier Network

You must be registered as a user in the JAGGAER Supplier Network to access the application. When you registered, you entered a unique email address and password to access the Network. **Note**: The email address provided as your username must be unique. You cannot use the same email address to log into separate portals.

You may log into the JAGGAER Supplier Network using your registered email address and password at this URL:

https://solutions.sciquest.com/apps/Router/SupplierLogin



You will initially enter your email, and click Next. Once the system validates your email address, you will be prompted to enter your Password.

If you have forgotten your password, you can select to reset it. See Forgotten Password for details.

If you have forgotten your registered email address, you must contact JAGGAER Support for login assistance.

Registration

Once the first user logs into the Supplier Network, your organization is registered as a supplier. You do not have to complete any additional information in order to be considered a part of the Supplier Network. You are encouraged, however, to complete as much profile information as possible in order to give customers the information they may need to make appropriate business decisions about which suppliers to enable within their own eprocurement application. Some customers may require that specific profile information be completed in order to do business with your organization.

Supplier Network Profile

Within your JAGGAER Supplier Network Portal, you may manage basic information about your supplier organization such as name, addresses, service areas, legal identification, diversity classifications and more. This is known as your Network Profile.

Navigate to your network profile by selecting the **View Your Company's Network Profile** link available on the home page, or by navigating to **Suppliers > Supplier Profile > Manage Company Network Profile** from the side menu bar.

Required Permissions

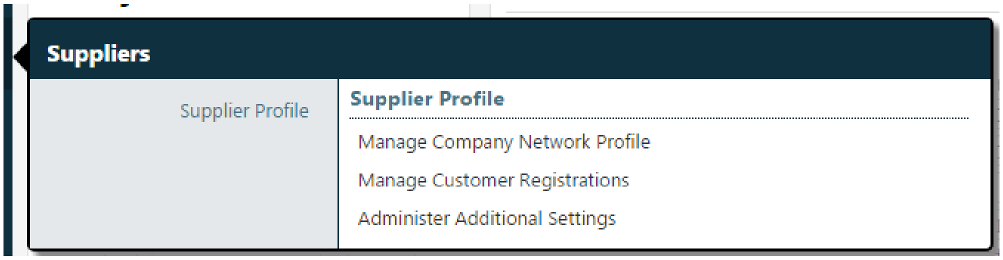
Users in the Supplier Network may be given access to view the profile only, or to edit the profile. The permissions apply to both the Network Profile and the customer registration profile.

- **View Company Profile**: Provides access to the **Manage Company Network Profile** page and **Customer portal profile** page in read-only view. The user cannot make edits to the profile data.
- **Edit Company Profile**: A user may edit all fields in the company's profile found on the **Manage Company Network Profile** and the customer portal profile pages. A user with this permission may also control visibility of the supplier to the JAGGAER Supplier Network.
- **View TIN/SSN**: With this permission users have a link to view the masked Social Security Number on the supplier profile. If this permission is not enabled, the Social Security Number will be masked with asterisks (*) with no ability to view unmasked.
- **View Sensitive Bank Information**: This permission gives the user the ability to view specific bank account information in the Payment Information section of the supplier profile. This permission is required to view the Account Number listed on a Bank Account. With this permission ON, the user will see a link to View Account Number in order to view the field value.

Network Supplier Profile Data

In the JAGGAER application, information about you as the supplier is located in the Supplier Profile. The Supplier Profile contains information about your company such as business information, addresses and contacts, and payment information. Information for fields in each of the profile areas is detailed in Supplier Profile Fields. A **History** tab is available that logs all changes made to your profile. A user must have the **View Company Profile** to access the profile pages. A user must have the **Edit Company Profile** permission to make changes to profile pages.

Navigate to your company profile via the **Suppliers** menu.



The profile is organized into different pages. Some information is available to all customers who choose to view your profile, and some information is available to customers with specific licenses.

INFORMATION AVAILABLE TO ALL CUSTOMERS:

- **Company Overview**: This section contains basic identifying information such as Legal and Doing Business As name, Legal structure and tax identification number, as well as website address.
- **Business Details**: This section contains information about when your business was established, number of employees, business description, service area, and types of products/services you provide.
- **Addresses:** Here you can add multiple Fulfillment, Remittance, and Physical Addresses for your organization.
- **Contacts:** Select to add contacts for your supplier organization. Types of contacts include Catalog, Corporate, Customer Care, Fulfillment, PO Failure, Remittance, Sales, Technical and Other. Contacts may be associated to an Address that exists in the Addresses section of the profile.
- **Diversity:** Select the appropriate Diversity Classification(s) for your supplier organization. Note that the classification for Small Business Enterprise (SBE) is calculated based on the number of employees, annual sales, and NAICS code provided in your profile. You must manually select if your organization qualifies as an SBE, and you will see a message indicating if the profile information indicates you do or do not qualify.

INFORMATION AVAILABLE TO SPECIFIC CUSTOMERS:

The following information is visible to specific customers with appropriate licensed solutions.

- **Locations:** This section allows you to add Locations for your organization, to which addresses and contacts can be associated to Addresses and Contacts in the profile. Location types include Headquarters, Fulfillment Center, and Other.
- **Insurance:** Select to add Insurance information and attach documents that may be useful to your customers.
- **Payment Information:** In this section you may enter payment information that

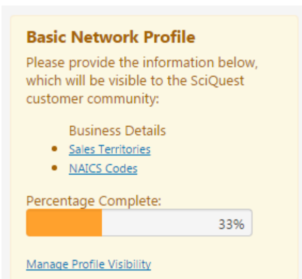
includes type of payments and specific bank account information as applicable.

- **Tax Information:** You may attach a copy of your W9 or other tax form.

NETWORK PROFILE COMPLETENESS

A **Basic Network Profile Completeness** scale displays to the left of the Network Profile. This panel provides information about the completeness of the supplier's network profile. The Network Profile is considered complete when the following fields are populated:

- Legal Company Name
- Sales Territories - At least one question in this section must be answered.
- NAICS Codes - At least one NAICS code must be saved.



A quick link is available to **Manage Profile Visibility** that navigates the user to **Suppliers > Supplier Profile > Administer Additional Settings** page. Only users with appropriate permissions will see this link. This page is where you control if all JAGGAER customers can access your supplier profile, or just those customers with whom you have a relationship. See Visibility in the JAGGAER Network for more information.

Customer Use of Supplier-Managed Profile Data

Customers can choose to utilize or override information that you provide in the Supplier Network. When you enter information for a field that a customer has previously populated, the customer-provided information will remain visible, but it will be flagged as overridden. When you enter information for a field that a customer has not previously populated, the supplier-managed information will be the default information.

NOTE: If you manage multiple companies through a single Supplier Network Portal, you can select a specific supplier and edit the profile information for each.

Initial Population of Network Profile via Customer Branded Profile

Suppliers in the Supplier Network complete profiles for each Customer Branded Portal with which they have a relationship. The Supplier Network Profile is completed separately from customer branded portal profiles. When a new supplier registers in a Customer Branded Portal and they do not yet have a Network Profile, information provided on the Company Overview page and Business Details page in the customer branded registration profile will be copied to the Network Profile. The specific fields that are copied (if present in the customer branded profile) are:

- **Company Overview**: Legal Company Name, DBA, Country of Origin, DUNS information, Legal Structure, Tax ID Number Type and Tax ID Number, VAT, Exempt from Withholding/Attachment, Website
- **Business Information**: Year Established, Number of Employees, Business Description, Annual Sales, Sales Territories information

This saves you time when completing the Supplier Network Profile information. A complete Network Profile also means that future registrations with customers will have much of the information already populated.

Information is copied from the customer branded profile to the network profile ONLY if there is a single customer branded profile and if information does not already exist for the field. If another customer profile relationship exists, information is no longer copied, and the network profile information must be entered separately from customer branded profile information.

Information that is populated in the network profile via the customer branded portal entry is captured in the profile history as being applied from the customer branded portal.

Customer Registrations

Customers with appropriate licenses may configure a supplier portal that you may access through the JAGGAER Supplier Network. Within that supplier portal, you may manage that specific customer's invoices, manage business profile information and respond to sourcing events for that customer.

Customer-specific Login URLs

You may navigate to a customer’s portal from within your Supplier Network, or by specifically logging in to the customer portal from the customer’s specific URL. The customer will provide this login information to you, but it will follow this format, with the Customer organization at the end:

https://solutions.sciquest.com/apps/Router/SupplierLogin?CustOrg=CustomerOrgName

If the customer has configured the page content to display in other languages, select a language from the dropdown button on the top right of the page.

You will initially enter your email, and click **Next**. Once the system validates your email address, you will be prompted to enter your **Password**. Use the same login credentials as for the JAGGAER Supplier Network – your registered email address and password.

If the system does not recognize the user email as a member of the customer portal or JAGGAER Network, a message will display depending on if the customer is accepting new registrations. If appropriate, the user will be prompted through the steps to register as a supplier.

Once in the customer portal, you may navigate back to the Supplier Network by selecting your user name and choosing the option in the drop down.

ACCOUNT ACCESS REMOVAL

If a customer removes the relationship with a supplier who had access to the Customer Branded Portal, the supplier user will receive a message upon attempting to log in to the portal that the account has been deactivated. A similar message displays when attempting to access a deactivated account from a registration email.

Contact the customer if you believe your account has been deactivated in error, or if you need other information.

Viewing Customer Registrations

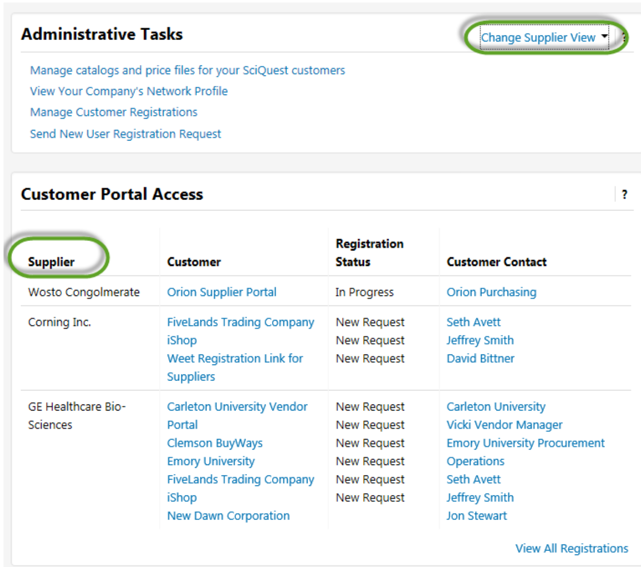
You may quickly view the customers with a supplier portal in the **Customer Portal Access** widget on your home page. Select a **Customer Name** to navigate to the Customer Branded Portal. Note the **Registration Status**. Select a **Customer Contact** to see the contact's information and to send an email from your email client. If you do not see a customer listed in the widget, click **View All Registrations** to view the full list.

Customer Portal Access ?

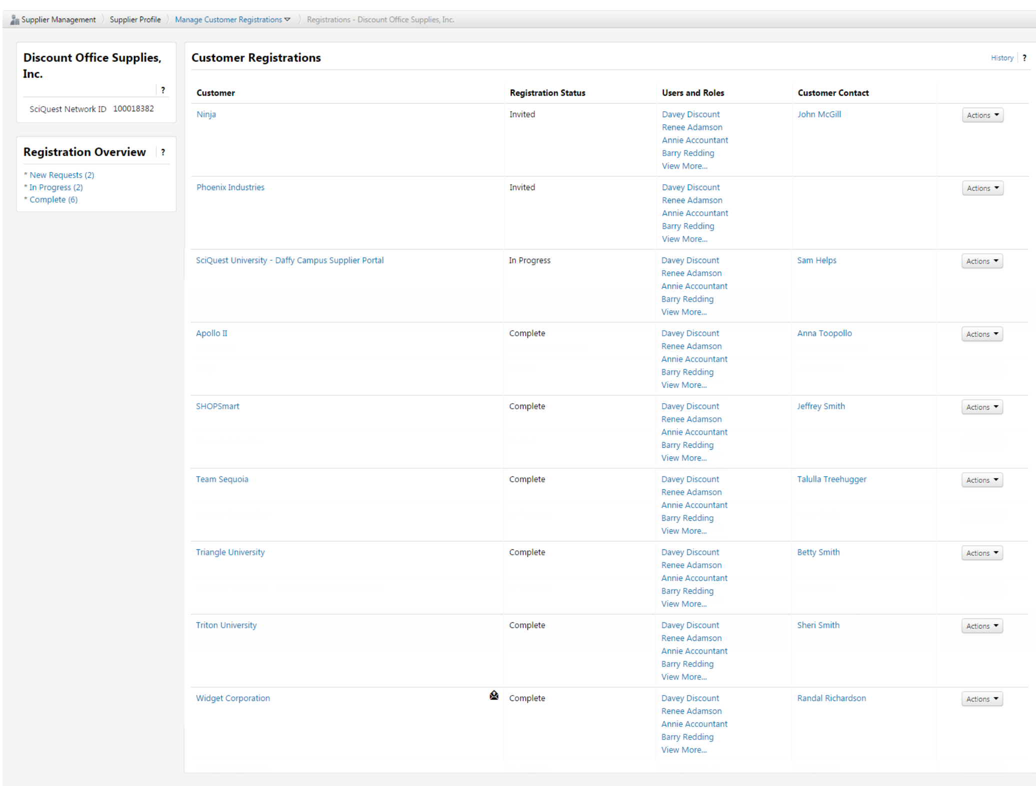
Customer	Registration Status	Customer Contact
Contract University	Invited	
Ninja	Invited	John McGill
Phoenix Industries	Invited	
Omega Corporation	In Progress	Betty Smith
SciQuest University - Daffy Campus Supplier Portal	In Progress	Sam Helps
Apollo II	Complete	Anna Toopollo
SHOPSmart	Complete	Jeffrey Smith
Team Sequoia	Complete	Talulla Treehugger
Triangle University	Complete	Betty Smith
Triton University	Complete	Sheri Smith

View All Registrations

If you manage multiple catalogs within your portal, Customer Portals will be displayed by **Supplier** in the widget. If you would like to see the list for a specific Supplier, click **Change Supplier View** in the **Administrative Tasks** widget and select the appropriate supplier managed by your portal.



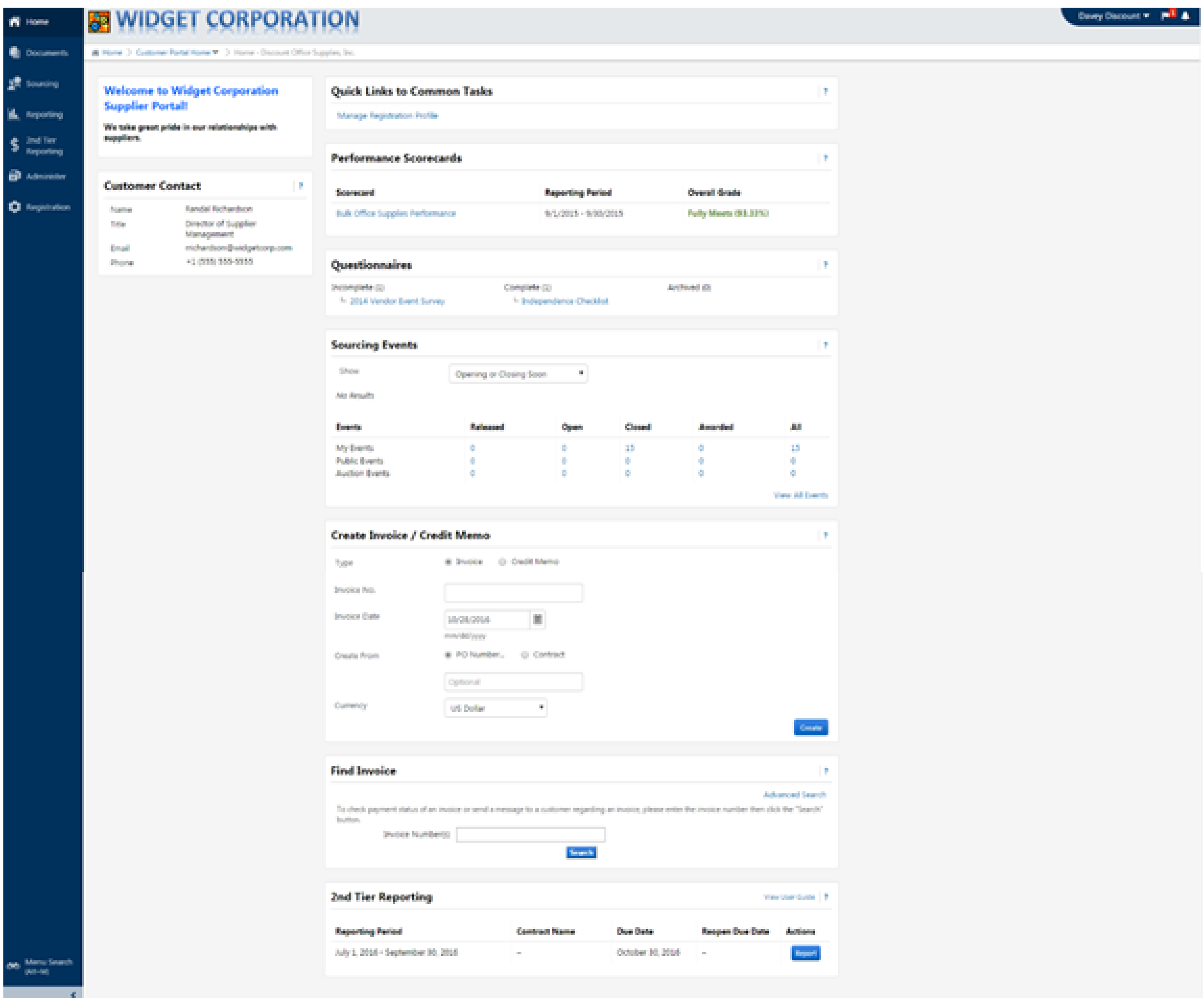
You may also access customer branded portals from anywhere in the application by navigating to **Suppliers > Supplier Profile > Manage Customer Registrations** from the vertical menu items. Select the customer name to navigate to the customer portal, or by selecting the **Actions** button and choose **Go to Customer Portal**.



Customer Portal View

When you have selected to navigate to the customer portal within the JAGGAER Supplier Network, you will land on the customer's portal home page or the supplier profile, depending on the status of your registration with the customer.

Note: The options will show on the home page according to your relationship with the customer AND your user permissions. For example, if the customer does not accept invoices through the portal OR you do not have permission to create or view invoices, you will not see the ability to create or find invoices. As another example, if the customer does not have the Indirect Sourcing solution or has not submitted Sourcing Events to you, or you do not have permission to see sourcing events from that customer, you will not see the Sourcing Events widget.



1. **Customer logo/identification**. You will see the customer's logo and organization colors, as well as a message from the customer.
2. **Customer Contact**. The customer may provide the name, email address and phone number for the person to contact with questions about any of the information you see in the customer portal.
3. **Side Navigation Bar**. In the customer portal, you will see only a few menu options, since most tasks are applicable to your Supplier Network rather than the customer portal. The menu items are specific to within the customer portal.
    a. **Home**. Selecting this icon from anywhere in the customer portal will bring you to the customer portal home page. It will not navigate to the Supplier Network Home page.
    b. **Documents**. Allows a user to view purchase orders, view invoices, and access export files specifically for this customer. The search and export functions will not access any other customer documents from this menu.
    c. **Sourcing**. Navigate here to search for Sourcing Events for this customer.
    d. **2nd Tier Reporting**. If a customer has enabled a supplier as a prime supplier, the supplier may enter 2nd tier reporting data according to the customer's reporting schedule.
    e. **Administer**. Navigate here to **Send New User Requests** and see **Pending User Registrations**. For information on sending and managing user requests, see User management.
    f. **Registration**. In this area you may navigate to the registration profile for this customer.
    g. **Menu Search**. Use this feature if you are unsure of the location of a specific menu within the customer portal. This is a keyword search that returns a list of pages containing that keyword. You can click on the search results to navigate to the appropriate page.
4. **Quick Links to Common Tasks**. This area contains links to navigate to areas in the customer portal that you may need to visit frequently.
5. **Performance Scorecards**. If the customer has chosen to share scorecard information with you, it will show here. Select the Scorecard name to view details. See Supplier Performance Scorecards for more information.
6. **Questionnaires**. Customers may assign questionnaires to suppliers to gather additional information. They are shown by status. Click to navigate to the questionnaire. See Customer Questionnaires for more information.
7. **Sourcing Events**. Quick view of upcoming and current sourcing events for this customer. Use the Show filter to see a list of events meeting other date criteria. You can navigate to an event by selecting the Action button, or selecting the number hyper-

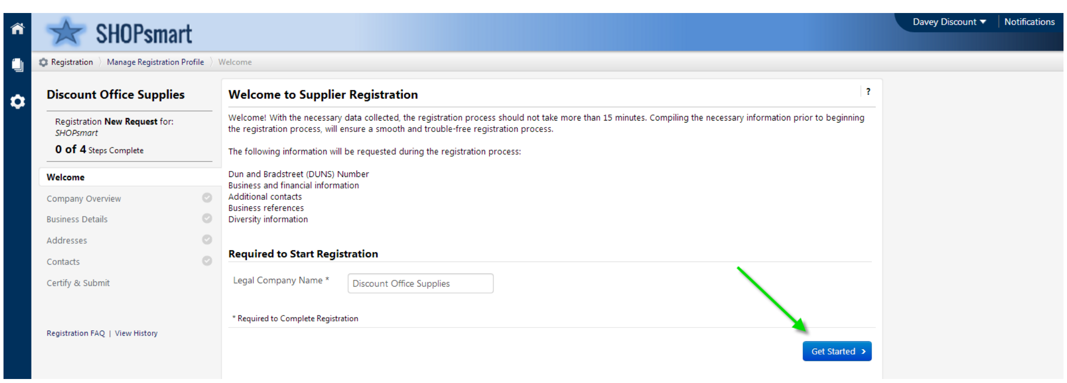
link for the status of events. You can also click to View All Events to see the search results for all events. See Sourcing Events for more information.

8. **Create Invoice/Credit Memo**. A widget to quickly create an invoice or credit memo specifically for this customer. If the customer has contracts associated with your organization, you will see the option to create an invoice from a contract in the widget.
9. **Find Invoice**. Search for invoices specifically for/from this customer.
10. **2nd Tier Reporting**. Quick link to enter the 2nd Tier reporting for diverse suppliers with whom you do business, according to the customer's requirements. See 2nd Tier Reporting for more information.
11. **User Logout** or **Return to Network**. Select your name to select to return to your Supplier Network or to Logout. Please note that user profile management is only available through the Supplier Network, and not in the customer portal.
12. **Action Items**. If there are any action items for this customer, they are indicated with a red number here. Click on **Action Items** to see a link to navigate to the item needing attention.
13. **Notifications**. You may also see and navigate to the notifications specific to this customer (if you have enabled any email notifications in your user preferences).

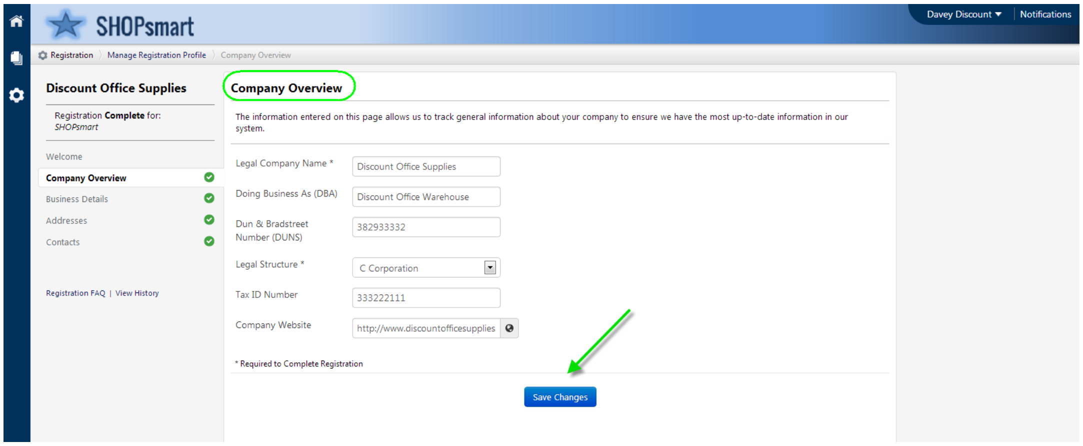
The Customer Specific Profile

Your network profile contains information that is available to all customers. However, you may want to enter specific information applicable to a customer who has provided you with a portal. Also, customers with appropriate licenses have the ability to indicate what information they require in order to do business with your organization.

When you select to navigate to the customer specific profile to begin the registration process, you land on a Welcome message with a registration checklist and FAQ link.



If you have previously viewed the welcome message or after you have accepted the welcome by clicking **Get Started**, you will be navigated to the profile.



Required Permissions

The same permissions apply as for access and visibility in the Network Profile.

Differences from your Network Profile

Your Network Profile information “copies” to the customer-specific profile for each new registration invitation. However, once you enter or overwrite information in the customer-specific profile, the information is specific to the customer.

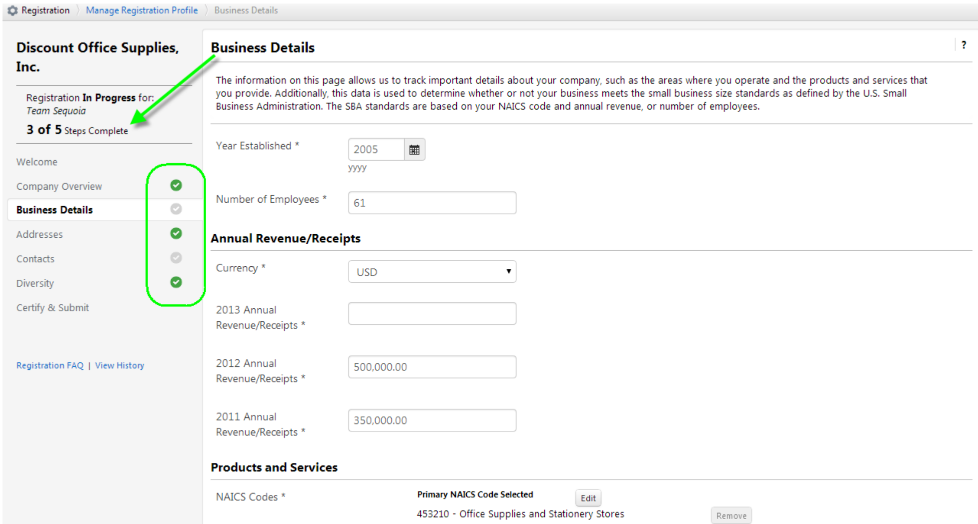
You will notice there are a few differences between the Network Profile and a customer-specific profile.

- **The customer-specific profile may not contain all the Network profile fields**. For example, the customer may not want you to manage the Tax Identification Number field for them, so they will not include it in the profile. You still manage your Network value, but the customer will manage a specific value for their organization. Another example is they may only accept certain Location types, not all those available in your Network Profile.
- **The customer can require fields to be completed**. In the Network Profile, only the Legal Company name is required. The customer can require additional fields to be completed in order to be able to fully register with their organization. Required fields are indicated with a star. The customer may also require validation on some fields, such as requiring that Tax ID numbers be unique among their suppliers.
- **The customer can request additional information.** The customer can choose to ask you to complete additional information that is important for their businesses processes. These may be in the form of additional questions on separate pages and sections of the profile.

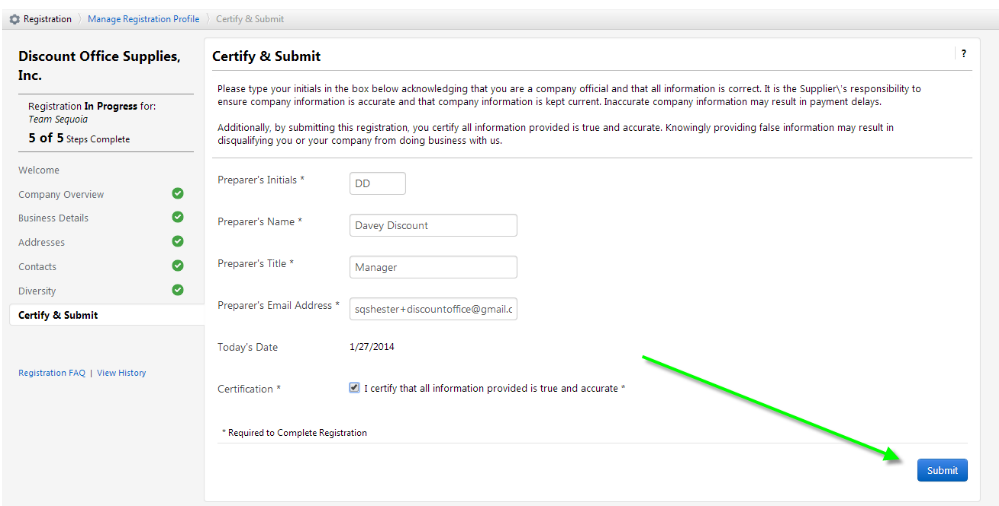
- **eSignature Documents**. Customers can attach **DocuSign** document templates for electronic signature in supplier registrations. You will see an **eSignature** document field, have the ability to access the document, review within DocuSign, complete and sign the document as indicated, and submit the signed document as part of the supplier registration. See eSignature Documents for additional information.
- **Commodity Code Selection**. Customers have the ability to provide a list of their specific commodity codes for you to select. If they would like you to manage this information, you will find the field on the Business Biography page.
- **Addresses, Contacts and Locations**. As you add information to these pages, the information will be applicable/visible to this customer only, and are not added to your Network Profile. A customer may request a specific zip code format that is not required in the Network profile. Also, you can deactivate customer addresses, contacts and locations. For more information, refer to Addresses, Contacts and Locations in the Customer Portal.
- **Payment Information**. If allowed by the customer, you may provide multiple remittance addresses for a single payment record. If multiple remittance addresses are not allowed, a drop-down selection of active remittance addresses is available.
- **Ongoing management of profile information.** You and the customer jointly own the information in the customer specific profile. The customer may choose to review any changes you make to profile data, and may choose to approve or decline the change. You will also see any changes the customer makes to your profile data. For more information, refer to Customer Specific Profile Edits.

Completing the Customer Registration

Required fields are indicated with a star (★). As you complete information for the page, select the **Next** button to save changes and proceed to the next page. click the **Save Changes** button to save your changes and remain on the same page. You will see the registration panel update the number of steps complete as well as indicate green checks for the completed pages.

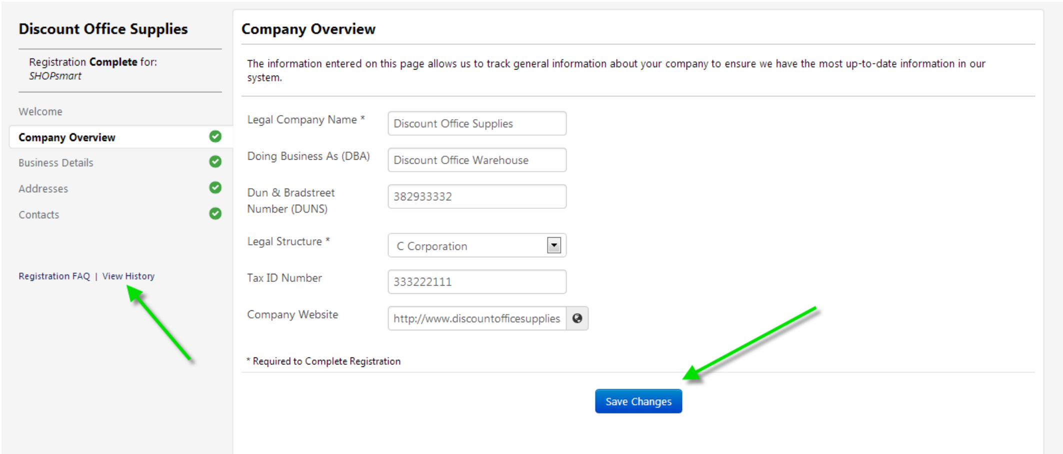


Once you have completed all required fields, enter the appropriate information on the **Certify and Submit** page and click **Submit**.



A confirmation page displays, confirming your registration is complete. You will see the available **Next Steps**, and have the option to **Return to the homepage** of the customer portal or Return to Registration Profile.

You may edit the profile information for that customer at any time by clicking the **Save Changes** button after making the edits on a page. View a History of changes to the customer-specific profile by selecting the **View History** link. History will also show if a customer has made changes to the profile data, and if the customer has accepted or declined any changes you have provided.



Step by Step

The goal of this task is to walk through viewing the various registrations a supplier may see from customers.

1. From your Supplier Network home page, select the appropriate customer from the **Customer Portal Access** widget by expanding the status indication and selecting the customer name. OR
2. Login to the customer portal with the customer's specific Login URL, as provided by the customer.
3. From the Customer portal home page, navigate to **Manage Registration Profile** if you are not already on the profile pages.
   a. Enter information as required and/or requested by the customer.
   b. For details on entering values for specific fields, refer to Supplier Network Profile topics.
   c. On the **Business Details** page, the customer may ask you to select Commodity Code values based on the organization's commodity code list. Click the **Edit** button to see a list of Commodity Code values for selection.
   d. Also on the **Business Details** page, the customer may have **Brands** associated with your profile in the **Products and Services** section. The **Brands** values are read-only and cannot be edited by the supplier.
      - If more than one Brand is associated with your profile, a link will display indicating "X brands selected". Select the link to see the **Brands** the customer has associated with your profile.
      - If less than 50 brands are associated, the Brands will display in a call-out box. If more than 50 brands are associated, the brands will display in an overlay list that can be searched.
      - If a single Brand is associated, that Brand name will display as read-only.

- **Note**: Since each customer manages their own brand list and associates values with the suppliers, you may see different values for each Customer Branded Portal registration.

e. On the **Diversity** page, once multiple classifications are added, a warning icon will display if additional information is required for a classification.

   i. Select the **Edit** button to open an overlay for the classification.

   ii. Complete the required information and Save.

f. On the **Payment Information** page, when providing a **Remittance Address** for a payment record:

   i. If allowed by a customer, you may provide multiple remittance addresses for a single payment record by selecting the **Edit** button and choosing one or more remittance addresses.

   ii. If a customer does not allow multiple remittance addresses for a payment record, you will select a single remittance address from the drop-down list.

g. Upon completing the customer-required information, enter the required information on the **Certify and Submit** tab, and click **Save and Submit.**

4. Edit fields at any time by selecting the appropriate tab and entering information.
5. View a History of customer-specific profile edits by selecting the **View History** link.
6. Navigate to the Network Profile as needed by selecting your name in the top banner, and selecting **Return to JAGGAER Supplier Network**.

Where to go for more help...

If you are having issues with managing your profile or other features in the Supplier Network, helpful information and resource documents are available on the Online Training and Support page in the Supplier Network portal. Additionally, you may reference other supplier information on the JAGGAER Supplier Network Resources page at:

https://library.jaggaer.com/suppliers

If you need additional assistance, you may contact supplier support at:

https://www.jaggaer.com/service-support/supplier-support/