SUPPLIER NETWORK PORTAL

GENERAL MANAGEMENT HANDBOOK FOR USERS AND ADMINISTRATORS

PRODUCT VERSION 20.3

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WELCOME

Objectives

The purpose of this handbook is to provide an overview of the JAGGAER ONE Supplier Network Portal to suppliers in the JAGGAER Network. Suppliers can use the JAGGAER ONE Supplier Network Portal to perform a variety of tasks. These tasks include:

- Accessing documentation on JAGGAER services, tools, and catalog and integration specifications.
- Understand how the JAGGAER application uses supplier data for users searching for items and services.
- Managing a network profile available to all customers, as well as specific profile information for some customers.
- Respond to Sourcing events (RFQ, RFP, RFI) from customers to provide information, goods or services.
- Uploading and managing product and pricing data for customers who access a hosted catalog.
- Testing integration points for customers.
- Viewing reports on catalog spend, customer activity and product/pricing freshness.
- View orders delivered via JAGGAER Order Manager via fax, email, cXML.
- Process orders delivered to the JAGGAER ONE Supplier Network.
- Invoice orders from the JAGGAER ONE Supplier Network.

If you have any questions about the JAGGAER ONE Supplier Network Portal, contact a member of our Supplier team at https://www.jaggaer.com/service-support/supplier-support/.

Understanding the Format

A **Lesson** is created for each major functional area of the system. Within each lesson, there are three sections:

1. An overview of the goals and functions in the lesson.
2. Background and conceptual information about the lesson. The concepts will help you better understand why and when you perform tasks in the system and how they relate to other parts of the system.
3. Step-by-step tasks detailing how to use specific features in the system.

IMPORTANT: Additional supporting documents and files related to the JAGGAER ONE Supplier Network can be accessed from the **Online Training and Support** page in the Supplier Network Portal.

Key Points

- This handbook will show you how to perform functions in the system. It is important to note that much of the how, when, and why the system is used is determined by your organization’s business practices. We suggest that you supplement this document with your organization’s business practices, goals, and policies.
- End user topics range from updating profile data, reviewing sales orders and sending invoices to customers. Typically, if you cannot perform a task, it is either not available in your site (based on site setup) or is reserved for user with specific permissions.

What you will learn…

The document is organized according to the major functions of the Supplier Network:

- **The Basics** - an overview of the Supplier Network– what it is and how it works, along with site navigation and where to go for help.
- **Login and User Management**- gaining access to the portal, setting up and configuring system users.
- **Managing the Supplier Profile** - managing your network profile of basic information such as business data, addresses and contacts.
- **Customer Registrations** - learn about registering with customers - their requirements and the specific customer experience in the Supplier Network Portal.
- **Managing Hosted Catalog Data** - an overview of the catalog product and price management process in the JAGGAER ONE Supplier Network.
- **Receiving Customer Orders** - using the Supplier Network as a means to receive and process customer orders.
- **Customer Enablements** - view and test integrations with JAGGAER customers with whom you provide punchout or invoicing integration.
- **Sourcing Events** - access sourcing events from customers.
- **Contract Visibility** - customers have the ability to share contracts. You can search for and view them in this area of the application.
- **Questionnaires** - responding to questionnaires from customers for specific qualification purposes.
- **Document Search** - search for sales orders or sales invoices.
- **Sales Orders** - viewing purchase orders from customers.
- **Sales Invoice** - creating invoices, viewing payment status and communicating with customers on the invoice.
- **Site Setup and Administrative Tasks**– reviews miscellaneous tasks performed by an administrator such as customizing the organization message.
- **Reporting from the Supplier Network**– introduces various reporting options available from the Supplier Network.

- **2nd Tier Reporting for Customers** - as requested by specific customers, providing diversity information on suppliers you work with to provide your goods or services to the customer.
- **Appendix** - Helpful reference information.

OVERVIEW

This section of the handbook gives an overview of the JAGGAER ONE Supplier Network, including basic information about features, site navigation and resources.

JAGGAER ONE SUPPLIER NETWORK

The JAGGAER ONE Supplier Network Portal is a web-based application that is used by suppliers/vendors in the JAGGAER ONE Supplier Network. Suppliers working with one or more JAGGAER customers are part of the supplier network.

Each supplier is provided a Supplier Network Portal, which is unique to their organization – and can only be accessed by users at the supplier organization and JAGGAER support staff.

Benefits of the JAGGAER ONE Supplier Network

The JAGGAER ONE Supplier Network is highly integrated with the JAGGAER application, which is used by customers to shop for items and services. Information is easily passed between these two “systems,” providing a number of **benefits** for suppliers, including:

- **Access to a complete PO history** by customer. Use this information to verify items that were ordered, dates the order was sent/delivered and more.
- **Manage your Network profile.** The Network Profile is basic information about your organization that is available to all JAGGAER customers.
- **Customer Portal**. Some customers may configure a portal for your use in invoice management, maintain specific profile information, as well as access and respond to sourcing events from the customer.
- **Streamlined methods for updating product information and pricing** per customer. Management of product data through the supplier portal interface puts the control in the supplier’s hands. Updated product and pricing information is immediately available to customers.
- **Simplified invoice creation and delivery.** The Supplier Portal allows suppliers to “flip” Purchase Orders from customers, make necessary adjustments, and send the invoice back to the customer in one simple step (electronically). This process greatly reduces wasted paper and time spent with traditional paper invoicing.
- **Invoicing for orders not originating in the JAGGAER system.** Options are available that enable suppliers to create invoices that do not have a “matching” PO in the customer's JAGGAER application. Perhaps an order that was called in or a back-end payment.

Managing Product and Price Information

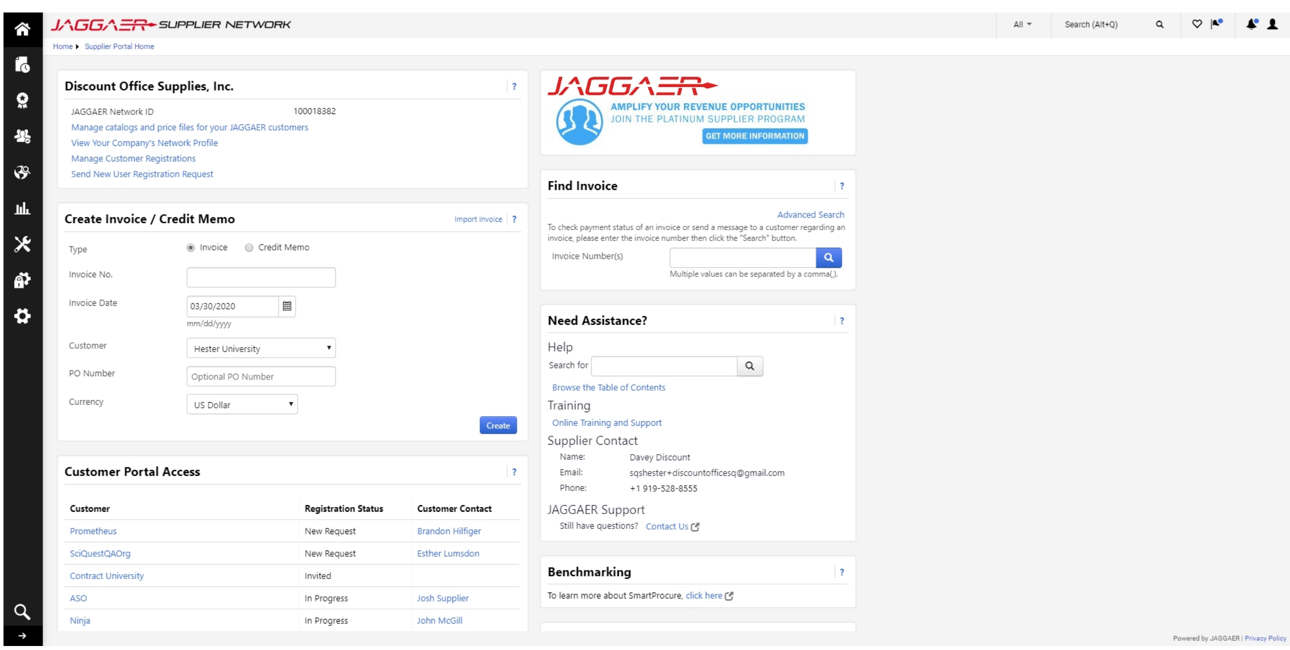
One of the primary benefits for a supplier to use the JAGGAER ONE Supplier Network is the ability to quickly and easily update product and price information for one or more of their customers using JAGGAER products. Suppliers can easily update individual item and item price or can submit bulk changes through a file import. These tasks are accomplished through the **Catalogs and Contracts** menu (available with the **Item Master** license) and are detailed in the **Supplier Network Portal Catalog Management Handbook** or online searchable help.

Site Navigation

When you log into the JAGGAER ONE Supplier Network, you will arrive on the Home Page. The exception is when a new user to an existing JAGGAER ONE Supplier Network logs in for the first time, in which case the user arrives on their user profile. The Home Page is standard in the JAGGAER ONE Supplier Network, with features and links to key functions used on a regular basis. There are a few key things to understand about site navigation and availability of system functionality:

- The menu items and pages/functions available to you in the portal are dependent on your portal's configuration, as well as your role and permissions.
- The JAGGAER ONE Supplier Network Portal allows users to set Bookmarks so that they can access frequently-used sections of the system quickly.

The image below shows various facets of the JAGGAER ONE Supplier Network Portal navigation. Read the descriptions following the image for more information about each of the navigational components:



1. **JAGGAER ONE Supplier Network Identification**. You will see the JAGGAER ONE Supplier Network logo, as well as a system organizational message. This information lets you know you are in your network view.
2. **Breadcrumbs**. In the top left under the organization banner, you will see breadcrumbs that display the active page and navigation path.
3. **Supplier Identification** and **Quick Links**. Your supplier name and JAGGAER ID will show here. If you manage multiple suppliers within the same JAGGAER ONE Supplier Network Portal, the widget will show as **Administrative Task Links**, and you have the option to select one of the suppliers you manage to view information specifically about that supplier. a dropdown selection box allows you to select a supplier before navigating further. This widget also contains Quick Links to areas of the application to manage your catalog/prices, your company profile, view customer registrations, and send user requests. The quick links displayed depend on your organization's licenses, relationships with customers, and your user permissions.
4. **Customer Portal Access**. If you have registered or are in process of registering with specific customers, this area displays the list of customers with whom you have a relationship, the status of registration, and contact information. Select the customer name to navigate to the Customer Branded Portal. Select a contact name to see additional details for the contact and to send an email via your email client. Select **View All Registrations** to navigate to the Customer Registrations page for a complete list.
5. **Sourcing Events**. Some customers may send you requests to respond to bids or proposals. Users with permission to see the events from those customers will see events here.
6. **Create Invoice/Credit Memo**. If your organization provides invoices to customers through your portal, use this area to quickly create an invoice or credit memo.
7. **Find Invoice**. Search for invoices from here. Click **Advanced Search** for more search criteria.
8. **Need Assistance?** Area to search online help, a link to the **Online Training and Support** page in the portal, and contact information for your portal and JAGGAER.
9. **User Information**. In the upper right-hand corner of the application, the user's name is displayed. Select the name to access the user profile, manage searches or search exports, or to logout.
10. **Bookmarks.** Using the star beside the username, you may add, remove or modify bookmarks for your favorite pages. You may also access the JAGGAER Organization Message from the bookmark drop-down.
11. **Action Items.** If you have any items needing attention, you will see a number indicated here. You may select the icon to see details and navigate to the appropriate area of the application.
12. **Notifications.** Any notifications/emails that you have enabled in your user profile will show here. Select the icon to see details, and then click on the notification to view it in the portal rather than opening an email.
13. **Quick Search.** Select the magnifying glass to see options to search for a sales order, sales invoice, or user without having to specifically navigate to those areas. You may also search the online help from here.

14. **Side Navigation Bar.** Most areas of the portal are accessed from the side navigation bar. The side navigation bar contains the top-level menu items. When you roll over the main menu icons, slide-out sub-menus display. In general, menus are grouped by related tasks. For example, catalog tasks are grouped in the **Catalogs and Contracts** menu, document search tasks are grouped in the Orders menu, etc. Clicking on the icon will return you to the homepage from anywhere in the application. **Note**: At resolutions wider than 1440 pixels, the menu name will display beside the icon. At widths less than 1440 pixels, only the icon displays.

    a. **Home.** Displays upon login and provides quick access to other key parts of the application. On the right side of the screen, a JAGGAER Welcome message displays. On the left, Administrative Task Links to manage your catalog or company profile, as applicable for your portal and user. JAGGAER Resources and your portal contact display on the right. On the left side, a Registration area provides links to customers with whom you have relationships. Also, there is an area to create and search for invoices/credit memos

    b. **Orders.** Allows a user to view purchase orders from JAGGAER customers, view invoices created through the portal, and access export files (for reporting, review, etc.). **Sales Orders** – Search and view orders delivered via fax, email, or cXML. Process orders delivered to JAGGAER ONE Supplier Network. **Sales Invoices** – used to create invoices from purchase orders and orders created outside of the system. Invoices can also be imported via a .csv file.

    c. **Catalogs and Contracts.** The catalog menu options allow the user to submit, extract, and manage product and price information (catalog management). In this area, you will also manage some catalog configurations. From this menu you can also view access a list of contracts that customers have shared with your organization.

    d. **Suppliers.** Navigate to manage your company network profile, customer registrations, or additional settings related to your profile visibility.

    e. **Sourcing.** Search for sourcing events that customers have sent to you for a response.

    f. **Reporting**. View reports on spend, customer activity, and product/pricing freshness.

    g. **Tools.** Access the **Online Training and Support** page to download documentation that is pertinent to you as a supplier. Also, navigate to **Customer Enablements** section to enter configurations for integrations, as well as provide additional information about your integration capabilities.

h. **Administer.** Contains **Manage Users** where you can search for and view user profiles, send user registration requests, and view pending users. Also from this option, navigate to view imports/exports requested through your portal.

i. **Setup.** In this area you may view and configure the Roles for your portal. Other functions in this area are primarily used for the initial setup of the portal (not day-to-day functions).

15. **Menu Search**. Use this feature if you are unsure of the location of a specific menu. 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.
16. **Site Map**. Select this link to navigate to a site map of the entire portal. You may link to areas of the portal from the site map.
17. **Page and Field Help**. Page and field level help is accessed by clicking on the question mark on each page and/or section within the page. In some areas, an icon may display next to a field, and may be selected to show additional information about the field.

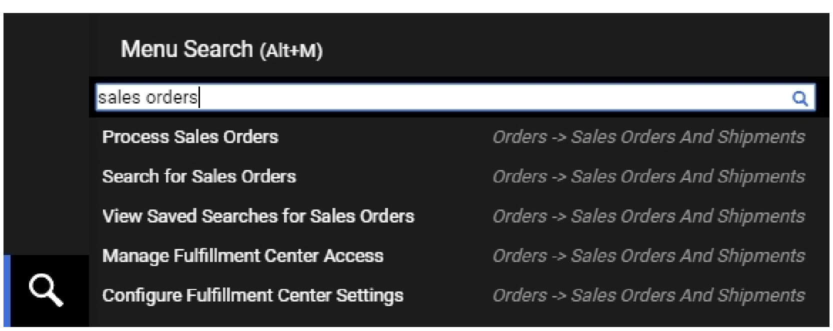
Searching for Menu Items

A user may not know the navigation steps to reach a certain area of the portal. Using the menu search feature, the user can search for and select relevant areas of the portal. Menu search is available by selecting the binoculars icon at the lower left of the page.

Step-by-Step

This exercise demonstrates how to use the menu search feature to find areas of the portal.

1. Select the **Menu search** icon at the bottom left of the page.
2. Begin entering a term or page name for the area you need, such as "invoice", "catalog" or "document search".
3. As you type, you will see results matching your criteria.
4. Select from the results to navigate to the desired page.



Adding/Removing/Editing Bookmarks

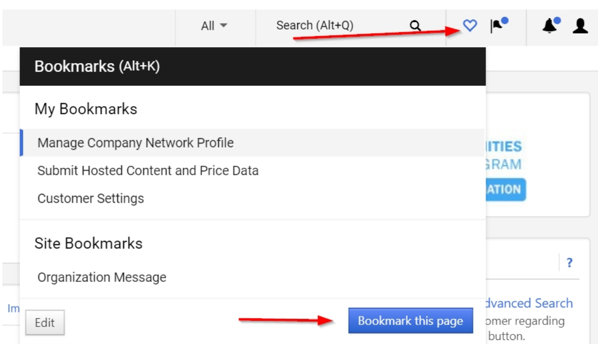
Users may add bookmarks to easily navigate to their favorite/most frequently used pages in the Supplier Network. The **Bookmarks** functionality is available by selecting the bookmark icon next to the user name in the top right banner.

Note: Bookmarks are only available for the Supplier Network pages, and not for customer portal pages.

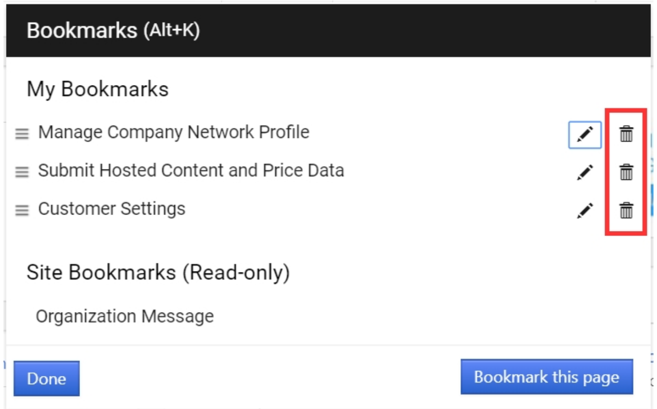
Step-by-Step

This exercise demonstrates how to create a bookmark for a page, as well as modify and remove bookmarks.

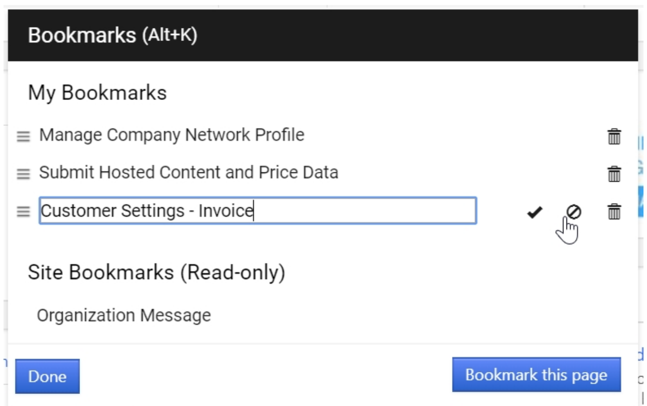
1. Navigate to a page in the Supplier Network that you would like to bookmark.
2. Select the bookmark icon in the top right banner.
3. Select the hyperlink to **Bookmark this page**.



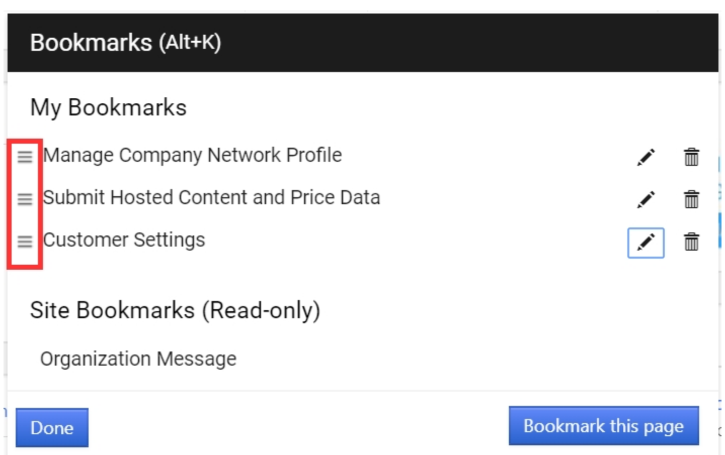
4. Navigate to several other locations in the Supplier Network, and repeat the action to **Bookmark this page.**
5. To reorder or remove Bookmarks:
   a. Select the bookmark icon to open **My Bookmarks**.
   b. Select the **Edit** button.
   c. To remove a Bookmark, select the Remove icon to the right of the Bookmark name.



d. Click the Edit icon to rename the bookmark. When you rename a bookmark, an icon is displayed that allows you to reset the bookmark to the original page name.



e. To reorder Bookmarks, select the icon ≡ to the left of the bookmark name, or hover over the bookmark name. Upon selection, hold and drag the bookmark to the appropriate place.



6. Select **Done** when you have made all the necessary changes.
7. Navigate to the appropriate Bookmark by selecting the Bookmark icon, and selecting the desired page.

Online Training and Support

The **Online Training and Support** page contains downloadable documents, video snippets and helpful links that may be useful to you as a JAGGAER Network Supplier. To view the details of each document, click on the link for that document. While you may save a copy of each document for your own use, please check the page regularly to ensure you are accessing the most current version.

Where to Go for Help

JAGGAER provides a number of sample files, instructional guides, and other resources to assist suppliers with the process of working with the network tools, JAGGAER, and buyer organizations. Below is a list of resources that may help you.

These files can all be accessed from the **Online Training and Support** page in the Supplier Network Portal.

Getting Started

An introductory guide to the Supplier Network.

Supplier Network Handbook

This handbook provides details for the JAGGAER ONE Supplier Network Portal. The Supplier Network Portal provides a range of features from managing hosted catalog data to submitting invoices to customers. Included in this handbook is information about:

- Basic Supplier Network Portal functionality and navigating.
- Searching for sales orders from customers.
- Managing your Supplier Network Profile, as well as specific customer profiles.
- Generating an invoice to a customer, and viewing invoice status.
- View customer enablements and enter configurations.

What's New in this Release

This document provides a high-level look at the changes related to the Supplier Network for the most recent release of JAGGAER products.

Supplier Enablement Licenses

An overview of the types of licenses that JAGGAER customers use when enabling suppliers.

Registration and Profile Management

An overview of the supplier registration profile for the Supplier Network as well as customer portals.

Invoicing 101

An overview of the Supplier Network invoicing process that is available for suppliers to use as the invoice method for some customers.

Invoicing Reference Materials

Reference materials related to submitting portal invoices to customers:

- Sales Invoice Import Guide
- Sales Invoice CSV Template
- Sales Invoice Sample Import File

What is Integration?

An overview of the types of integrations available for suppliers and customers.

Supplier Integration Specification

This guide provides details for cXML suppliers, including sample messages and standard messaging for punchouts, orders, confirmation, and invoicing. This guide also contains information about Price and Availability call.

Supplier Data Quick Reference Guide / Catalog Management 101

A short, visual guide describing the process for adding and updating item and price information to make products available to your customers.

Supplier Catalog Management Handbook

This handbook provides details on configuring your catalog and pricing through the supplier network.

- Submit and manage products, pricing and images into the JAGGAER database
- Extract your catalog and pricing from the JAGGAER database
- Understand how to create and maintain a hosted catalog

- Set up advanced search shopping for buyer organizations (Live Price and Level 2 PunchOuts)

Hosted Content Impacts on Product Search

See how your content translates into a customer's product search.

Catalog Management Reference Materials

Reference materials related to managing your catalog in the Supplier Network:

- Hosted Catalog Sample Data - a sample file of content and pricing information populated into the Catalog Management Template.
- Catalog Management Template - for suppliers to use for adding hosted catalog item data, list pricing, pricing for multiple buyer organizations, and punch-out access.
- Item Categories and Attributes - comprehensive list of the categories and sub-categories used to group hosted catalog items.
- Standard Units and Unit Mappings - complete list of units and unit mappings used to standardize Product Size and Packaging UOM values.

Product Search at a Glance

This is a two-page “quick guide” designed to help shoppers from buyer organizations quickly learn how the Search functionality works in the JAGGAER application. Suppliers can refer to this to better understand how their data is displayed to shoppers.

JAGGAER ONE Supplier Network Resources

Visit the link https://library.jaggaer.com/supplier-network/ to see information about the latest product release, as well as links to Supplier Network video snippets.

LOGIN AND USER MANAGEMENT

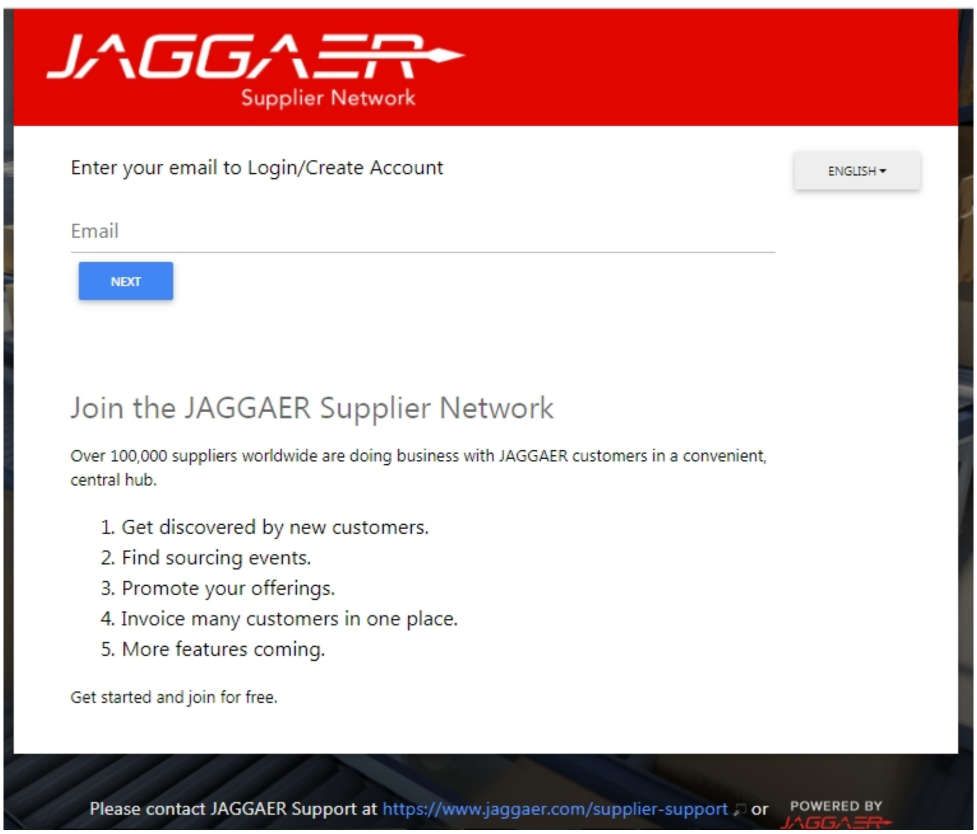
This lesson includes information about logging into the Supplier Network, as well as details about the User profile.

LOGGING INTO THE SUPPLIER NETWORK

You must be registered as a user in the JAGGAER ONE 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 ONE 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 the system does not recognize the user email as a member of the JAGGAER Network (i.e. the user has only registered with specific customers), a message and **Join Now** button will display. When selected, you will be prompted through the steps to register as a JAGGAER Supplier.

Step by Step

The goal of this task is for a user to login to the Supplier Network.

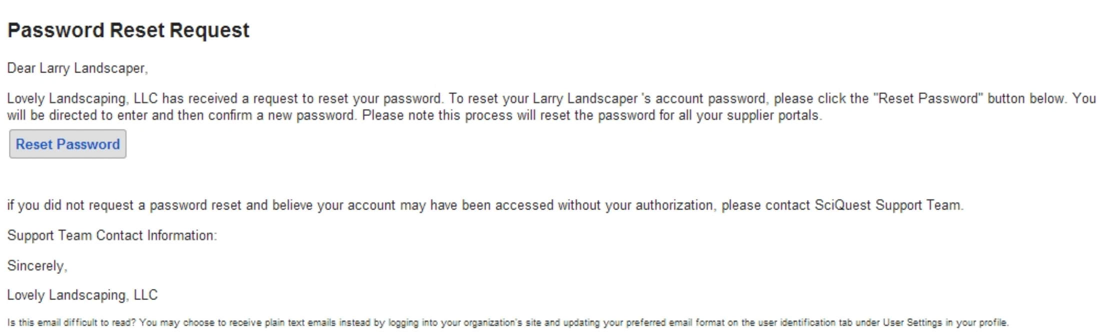
1. Go to the JAGGAER ONE Supplier Network Portal URL: https://solutions.sciquest.com/apps/Router/SupplierLogin.
2. To see configured text in another language, select the language dropdown on the top right. **Note**: Not all text is configured in all languages.
3. Enter the email address associated with the user account on the login screen. If you are unsure of the proper email address please contact your System Administrator. Click **Next**.
4. Enter a valid **Password** on the login screen. Passwords are case sensitive. Click the **Login** button. You are logged in to the JAGGAER ONE Supplier Network Portal and navigated to the Home page. Once logged in, the role(s) and permissions assigned to the user dictate what screens are visible and what functions are accessible.
5. **NOTE**: If you have forgotten your password, use the **Trouble Logging In?** link on the login page.

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.

Forgotten Password

If you have forgotten your password, select the **Trouble logging in?** hyperlink for assistance in retrieving your username or password. You will be prompted to enter the email address associated with your user account. You will then receive an email with a link to proceed with resetting your password.



Password Reset Request

Dear Larry Landscaper,

Lovely Landscaping, LLC has received a request to reset your password. To reset your Larry Landscaper 's account password, please click the "Reset Password" button below. You will be directed to enter and then confirm a new password. Please note this process will reset the password for all your supplier portals.

Reset Password

if you did not request a password reset and believe your account may have been accessed without your authorization, please contact SciQuest Support Team.

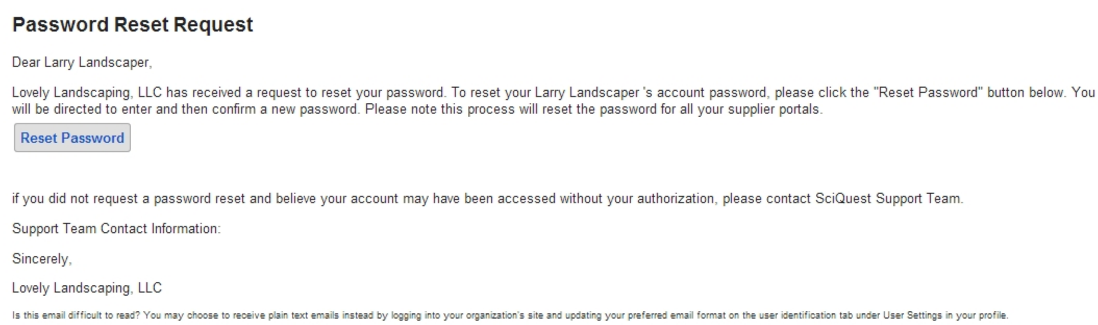
Support Team Contact Information:

Sincerely,

Lovely Landscaping, LLC

Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the user identification tab under User Settings in your profile.

Upon selecting the **Reset Password** button, you will be directed to a webpage where you must answer the security question configured for your user account. You will also enter and confirm the new password on this page.


Password Reset Request

Dear Larry Landscaper,

Lovely Landscaping, LLC has received a request to reset your password. To reset your Larry Landscaper 's account password, please click the "Reset Password" button below. You will be directed to enter and then confirm a new password. Please note this process will reset the password for all your supplier portals.

Reset Password

if you did not request a password reset and believe your account may have been accessed without your authorization, please contact SciQuest Support Team.

Support Team Contact Information:

Sincerely,

Lovely Landscaping, LLC

Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the user identification tab under User Settings in your profile.

Step by Step

The goal of this task is to reset your password for the Supplier Network Portal.

1. Go to the JAGGAER ONE Supplier Network Portal URL: https://solutions.sciquest.com/apps/Router/SupplierLogin.
2. Click the **Trouble Logging In?** link on the login page.
3. Enter the email address associated with your user account.
4. A confirmation message will indicate your request has been submitted.
5. You will receive an email to the login email address provided in Step 3 with a link to Reset Password. Select the button/link to Reset Password.
6. You will be navigated to a webpage to reset your password.
    a. Enter the security answer for the indicated security question, as configured for your user account.
    b. Enter the new password for your user account.
    c. Confirm the new password for your user account.
7. Select **Change Password and Login** to be logged into the JAGGAER ONE Supplier Network. Your password is now the password you provided in this exercise.

THE USER PROFILE

Each user in the Supplier Network has a unique profile, including identification and site accessibility. Users with the appropriate permissions have the ability to access their own profile.

Depending on the permissions granted, the areas of the user profile may be editable or read-only. Profile information can be set up by an administrator, users, or a mix of both. It depends on the individual organization’s business practice.

User Management

At the time your portal is created, JAGGAER will create a single user who has access to the application. This user will be assigned the **Manage All Portal Activities** role, which means they will have system **Administrator** privileges. The **Administrator** is typically the person who requested the Supplier Network Portal initially. Once a Supplier Network Portal is created, you can invite additional users to register in the Supplier Network.

User Management tasks

The main tasks you will perform related to users are:

- **Searching for users**: When you select to Search for Users, you may enter criteria to search by name, email, role, and many other criteria.
- **Viewing/Editing User Profiles**: Once you have selected a user profile from search results, you may navigate through the user’s profile to view settings. With the appropriate permission, you may edit the settings in your own or another user’s profile.
- **Creating New Users - Registration Requests**: You may select the link to **Create a New User** to invite a user to register for access to your JAGGAER ONE Supplier Network Portal. You can view the users that have been invited by selecting the **View Pending User Registrations** link. **Note:** New users may also be requested from a Customer Branded Portal, and by being added as a contact to a Sourcing customer's registration profile.
- **Managing Roles**: The JAGGAER ONE Supplier Network Portal is pre-populated with roles. In the **Manage User Roles** section of the network, you may choose to modify the default-configured Roles or add new roles. This feature is available through the **Setup > Organization Structure and Settings** menu option.

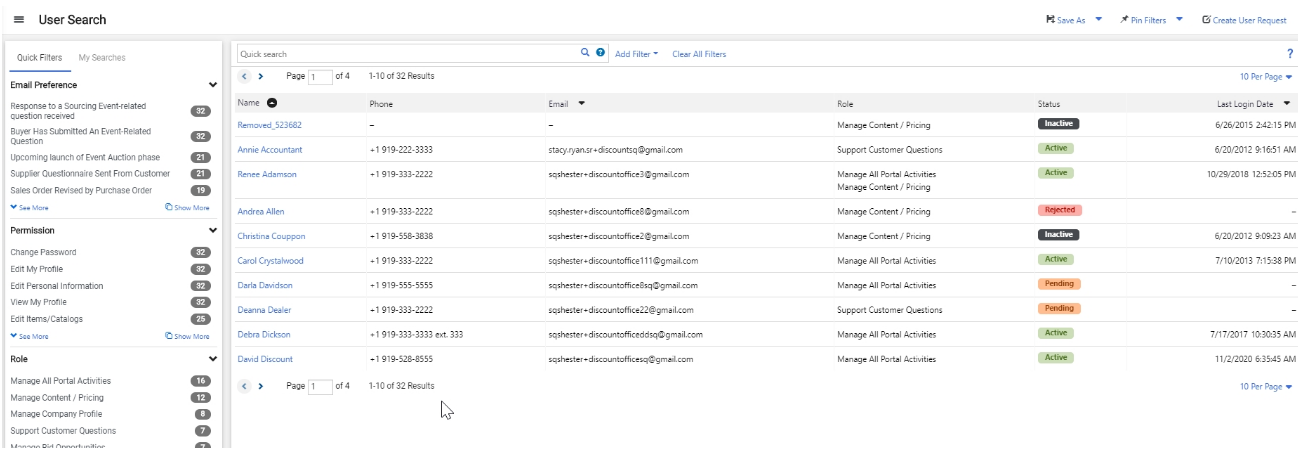
Customers may send a registration request to a supplier user who does not have a supplier portal user account for an existing supplier network portal. When such a request is initiated by a customer, the primary supplier portal contact will receive an email notification that a new user created an account to manage the customer's branded profile. You may edit the new user's profile to have additional permissions and access as appropriate.

Searching for Users

When you navigate to the **Search for Users** page, all users are displayed by default. You can also save frequently used searches as **Favorites**. A link to a **Manage Searches** page allows users to maintain personal as well as organization user search favorites.

A user must have at least one of the following permissions to search for users (Profile > Permission Settings > Administration: User Administration):

- View All User Profiles
- Edit all User Profiles/Roles/Permissions
- Edit All User Profiles Only



- **Perform a Quick Search** - You can perform a quick search of the documents by entering a value in the field and selecting the search icon . Matching users are returned in the search results.
- Use the **Expand/Collapse** button - Beside the **User Search** header, select the button to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.
- Add filters for an advanced search by selecting from the **Add Filter** button next to the Quick Search box, or by selecting from the **Quick Filters** tab to the left of search results.

Using the Add Filter button

- Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays.
- Click the checkbox for the appropriate filter. Configuration options display. **Important**: When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
- When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. To remove specific values from a filter, deselect the options within the filter. Click the to remove the filter.
- Repeat the steps above to add additional filters.
- Click the Search icon. The search results update to reflect the new filters.

Using the Quick Filters Tab

- If necessary, click the Expand button and select options from the **Quick Filters** on the left. Click the **Show more...** link to see additional values for a filter, if present.
- Search results are refined based on selection, and the selected filter option is listed above search results.
- Click to remove the filter above search results, and/or continue to refine using the **Quick Filter** options.

SEARCH FILTERS

Filters include:

- **Created Date** - Search for users created across all dates, within a specified time frame, or between two dates. Select **more options** to search **After** a specific date or number of days, or between a defined number of days in the past or going forward.
- **Email** - Begin entering an email address.
- **Email Preference** - When this filter is selected, the Email Preferences for the organization display, noting the number of users in the current result set with the email preference in parenthesis. Enter a term from an email preference in the Search box to find an email preference for selection. If you select more than one preference, users with any of the preferences are returned.
- **First Name** - Begin entering a name to search for users with a First Name containing the search term.
- **Last Login Date** - Search for users based on their last login date across all dates, within a specified time frame, or between two dates. Select **more options** to search **After** a specific date or number of days, or between a defined number of days in the past or going forward.
- **Last Name** - Begin entering a name to search for users with a Last Name containing the search term.
- **Permission** - When this filter is selected, the Permissions for the organization display, noting the number of users in the current result set with the permission in parenthesis. Enter a term from a permission in the Search box to find a permission for selection. If you select more than one permission, users with any of the permissions are returned.
- **Role** - When this filter is selected, the Roles for the organization display. Select one or more roles to search for users with any of the selected roles.
- **Status** - Select this filter to search for users with a specific status. If you select more than one, users with any of the select status values will be returned.

You can define more than one filter for the search. As filters are displayed above search results, click the to remove a filter.

You can make a filter your default view when navigating to the **Search for Users** page. The **Pin Filters** button contains the options to **Pin Filters** and **Pin Columns**. This action is recommended when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.

SAVING SEARCHES

When you have a set of search results that you will revisit regularly, you can choose to save the search in a Personal or Shared organization folder. Folders can be added as you choose to save a new search, or from the **Manage Searches** page.

Types of folders include:

- **Top level personal folder** – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
- **Top level shared folder** – this will create a new top level folder that is accessible to your organization. With this option, you will select if the entire organization can access the search in read only mode, or add specific access by user or role.
- **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.

If you save a search to your Personal folder, it is listed on the left for easy access when navigating to the Search for Users page. If you do not want to see the search listed here, click the vertical dots icon (⁝) to remove the shortcut from the page. You can still access it from the **Manage Searches** page (discussed below). You can **Rename** the filter by selecting the icon when the filter is not the current view on the page.

If you execute a saved search and make changes to the criteria, you can save the changes as a new filter, or select to **Discard Changes** to the saved search.

MANAGE SEARCHES PAGE

The **Manage Searches** page is available from the **Administer > Manage Users > Search for Users** page or from your User Profile dropdown selections. This is where all personal and saved users searches can be managed. Here, you can add new personal and shared folders, execute the search, and control the visibility as a shortcut on the Search for Users page. You can also edit the search name or description, move a saved search to a different folder, copy a search to another folder, and delete a saved search.

Step by Step

Search for Users

1. Navigate to **Administer > Manage Users > Search for Users**. The landing page displays a list of all users for the organization by default.
    a. To perform a quick search:
        i. Enter a keyword or phrase in the **Quick search** field. Select the help icon ( ) to see additional information about how the general **Quick search** works.
        ii. Click the search icon . Matching users are returned in the search results.
    b. To perform an advanced search:

i. Select from the **Add Filter** dropdown options. You can also click the **Expand/Collapse** button ≡ to view and filter from the **Quick Filters** panel on the left.

ii. The search results are refined to reflect the filter. The filter displays above the search results. Click the ⊗ to remove the filter.

iii. Choose to **Pin Filters** or **Pin Columns** if appropriate.

Save a Search

1. When you have a set of search results that you will revisit regularly, such as a list of Pending users, select the **Save As** dropdown option at the top of the page. A **Save Search** overlay displays.

   a. Provide a **Nickname** for the search, for example, Pending Users.

   b. Click **Add Description** to provide a description for the search results, if desired. This field is optional.

   c. Choose to add the saved search to a Personal or Shared organization folder, and click **Save**.

   d. If you do not have folders or need to define a new one, select the **Add New** link, and select the type of folder you would like to create:

      - **Top level personal folder** – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
      - **Top level shared folder** – this will create a new top level folder that is accessible to your organization.
      - **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.

   e. Enter a **Name** for the folder. You also have the option of entering a Description of the folder contents.

   f. Select **Save Changes**. A new folder will be added to the area you selected and is selected. Click **Save** to add the search to the selected folder.

Manage Searches

1. Select the **Manage Searches** link from the **Administer > Manage Users > Search for Users** page (or from your user profile dropdown).

   a. Add new folders by selecting the **Add New** dropdown on the top left. The same options are available as listed above when adding a single filter to Saved Searches.

   b. Click the search name or the **Go** button to run the search and see results on the Search for Users page.

   c. Select **Remove Shortcut** or **Add Shortcut** to control visibility of the saved search on the Search for Users page.

   d. To **edit** a search name or description:

i. Select the **Edit** link for the search you want to edit.

ii. Make the desired changes to the name and/or Description and select **Save**. The changes will be applied to the saved search.

iii. To edit the name and description of multiple saved searches, select the checkboxes to the right of the appropriate searches then select the **Edit** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then change the information for all of the selected searches.

e. To **move** a saved search from one folder to another:

i. Select the **Move** hyperlink for the appropriate search.

ii. In the **Move Searches** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.

iii. Select an existing **Destination Folder,** or select to **Add New**.

iv. Select **Save Changes**.

v. To move multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then select **Move** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then perform the action for all of the selected searches

f. To **copy** a saved search to another folder, while leaving it in the current folder:

i. Select the **Copy** link for the appropriate search.

ii. In the **Copy Searches** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.

iii. Select an existing **Destination Folder,** or select to **Add New**.

iv. Select **Save Changes**.

v. To copy multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then select **Copy** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then perform the action for all of the selected searches.

g. To **delete** a saved search, the **Delete** link for the appropriate search.

i. An overlay displays. Click **Yes** to confirm you want to delete the search.

ii. To delete multiple saved searches select the checkboxes to the right of the appropriate searches then select **Delete** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. All selected searches will be deleted.

Creating a User Request

In this exercise, we will focus on how an administrator would create a user request in the system. Administrators create a user request by entering basic, required information about the user. The invited individual is notified via email and can click from the email to complete the user setup.

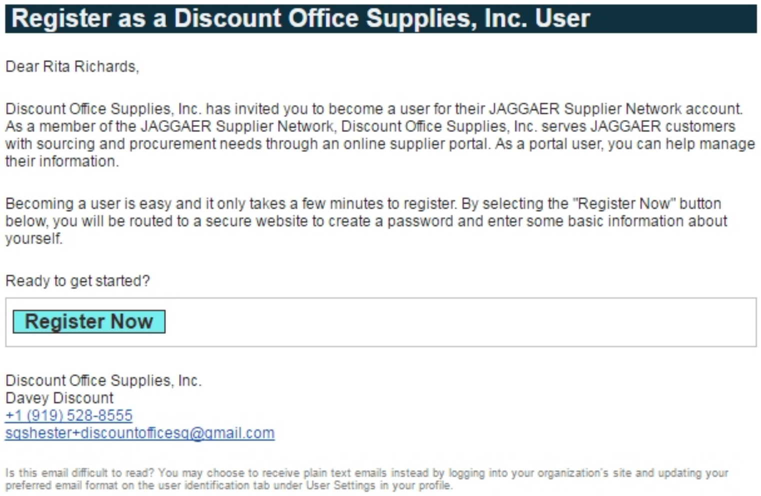
Step-by-Step

This exercise demonstrates how to create a user request. You can create a new user request from the Supplier Network Home page, or from a Customer Branded Portal home page.

1. **Login** to the Supplier Network or to a Customer Branded Portal. You can select to create a new user request via any of the following:
   a. On the Supplier Network home page, select **Send New User Registration Request** from the Quick Links panel.
   b. In the Supplier Network or a Customer Branded Portal, navigate to **Administer** > **Manage Users >Send New User Request**.
   c. In the Supplier Network or the Customer Branded Portal, from the **Administer** > **Manage Users > View Pending User Registrations** page, select the button to **Create User Request**.
2. Enter a First Name, Last Name, Phone Number and Email Address for the user. You can optionally enter a Title and Mobile Phone Number.
3. Although it is not required, JAGGAER recommends that you also select the user role from the **Role** drop-down box. This will ensure the user will have access to the appropriate features of the Supplier Network upon login.
4. Click the **Send User Request** button. The page is refreshed showing the user as a pending registration.
5. Invited users will receive an email that contains a link to complete the registration. Once a user has registered, the pending request will no longer display on the **registrations** page.
6. To re-send a request, click on the checkbox in the right-most column of the pending user request. From the drop-down box select **Resend Request**.
7. **For user requests sent from a Customer Branded Portal**: Once registration information is submitted, the new user is logged into the Supplier Network Portal. The user must select the appropriate customer from the **Customer Portal Access** widget to access the branded portal to which they have been invited as a user. The user will only have access to the customer portal from which they were invited, unless they have the **Manage All Customers** permission or are assigned the **Manage All Portal Activities** role with that permission.

Responding to a User Request

A user invited to register as a Supplier Network Portal user will receive an email requesting that they complete the registration process. The email will look similar to the one below:


Register as a Discount Office Supplies, Inc. User

Dear Rita Richards,

Discount Office Supplies, Inc. has invited you to become a user for their JAGGAER Supplier Network account. As a member of the JAGGAER Supplier Network, Discount Office Supplies, Inc. serves JAGGAER customers with sourcing and procurement needs through an online supplier portal. As a portal user, you can help manage their information.

Becoming a user is easy and it only takes a few minutes to register. By selecting the "Register Now" button below, you will be routed to a secure website to create a password and enter some basic information about yourself.

Ready to get started?

Register Now

Discount Office Supplies, Inc.
Davey Discount
+1 (919) 528-8555
sgshester+discountofficesg@gmail.com

Is this email difficult to read? You may choose to receive plain text emails instead by logging into your organization's site and updating your preferred email format on the user identification tab under User Settings in your profile.

From this email, the user can access the **New User Registration** page and complete registration.

Step-by-Step

This exercise demonstrates how to complete your registration as a Supplier Network Portal user.

1. In the email, click on the **Register Now** button.
2. You will be taken to the **New User Registration** page. If configured by the customer, you can see the text displayed in another language by selecting the language dropdown on the top right.
3. The **Your Contact Info** section will be pre-populated with the information entered by the System Administrator. You can make changes to these fields and enter information in any additional fields, such as **Title**.
4. The **Your Login** section will display the email address associated with your user. Enter and confirm a password for login.
5. Select an **Account Recovery Question** from the drop-down list. Enter and confirm your answer in the provided fields.
6. Click the **Create Account** button.
7. Your user registration will be complete and you will be taken directly to your User Profile in the Supplier Network. You will also receive an email confirming your registration.
8. You will now be able to view and update your user profile. For additional information about related tasks, please see the exercise View and Update the Profile.

Viewing User Information

Administrators with the appropriate permissions can view user information, including a full list of inactive and active users, users by role, name, or other criteria, and profile information for each user.

Step-by-Step

This exercise demonstrates how to locate user profiles in the Supplier Network.

1. Navigate to **Administer** **> Manage Users > Search for Users**.
2. Enter your search criteria and select **Search**. If no criteria are entered, all users are displayed upon **Search**.
3. From the Search Results screen, you may select to scroll through the pages by using the arrows or selecting a page number in the top right of search results. You may also sort the data on any of the columns listed with an arrow in the column name.
4. Select the user's name in the **Name** column to navigate to the user's profile. You may view and modify the profile information for the user.
5. To begin a new search after a user profile is open, simply click on the **Search for users** navigation in the **Manage Users** panel on the left side of your screen.

Inactivating or Deleting a User

Inactivating a user will prevent that user from logging into the application. None of the user information is removed, and the user account can be reactivated at any time. Deleting a user removes the user's personally identifiable information. When a user is deleted, the username is no longer stored in the application. Because username is "dynamically" retrieved on documents the username will be obscured on these objects. However, because user information such as first name, last name, address, etc. is "stored" on a document, that data will still display.

Inactivating a user only requires that user have the ability to manage user profiles (Edit All User Profiles/Roles/Permissions). In order to delete users, the user must have the **Delete a User** permission **(Permissions Settings > Administration > User Administration).**

Important: Deleting a user should be a very deliberate action that **cannot be reversed**. Use caution when assigning permission to perform this task. Only administrators should have the ability to delete users.

Step-by-Step

1. Navigate to **Administer** > **Manage Users > Search for Users**.
2. Search for and access the appropriate user.
3. Expand the **Administrative Tasks** section on the left menu.
    a. To inactivate the user, click **Inactivate User**. To reactivate an inactive user, click **Activate User**.
    b. To delete a user, click **Delete User**.
        i. A Confirmation pop-up displays. Click **Yes** to proceed with the deletion or **No** to cancel it.
        ii. A pop-up displays while the deletion is in progress. The message on the pop-up changes once the deletion is complete. Click **Close**.

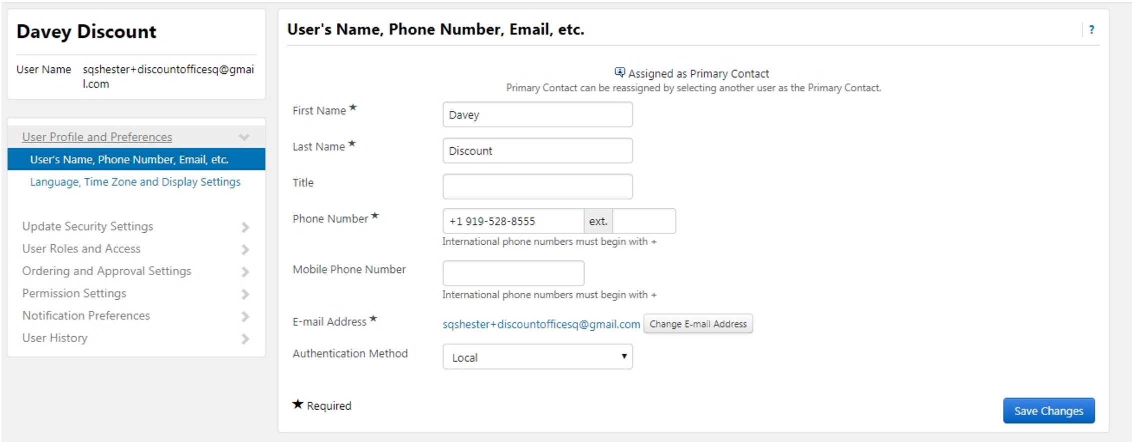
Note: If you have the **Delete a User** permission, you will receive a notification any time a user is deleted.

What is the User Profile?

Users with the appropriate permissions have the ability to access their own profile. You can navigate to your profile by selecting the **View My Profile** link when clicking on your name in the top navigation banner. Other user profiles are accessible via the **Administer > Manage Users** pages.

The user profile screens are grouped into similar task areas, each with its own set of sub-tasks, for easy viewing. Below are a few examples of what can be captured in the user profile:

- User login and contact information, language and display settings
- Roles and access to site
- Approval settings
- Permissions
- Notification Preferences
- History of changes to the profile



Navigating the User Profile

The User Profile is organized into similar task areas. You may select a main heading such as **User Profile and Preferences**, or navigate directly to a sub-task area such as **Permission Settings > Administration**. Once you select a main area for navigation, additional options are expanded for selection

User Profile and Preferences

The User Profile and Preferences menu contains information about your user identification and appearance preferences.

- **User's Name, Phone Number, Email, etc**. From this page you may view/edit the user's basic identifying information including name, phone, mobile phone, email, and security question/answer. For active users, you will also see a button to **Assign as Primary Contact** or a message that the user is already assigned as the Primary Contact.
- **Language, Time Zone and Display Settings.** You may select to modify the language, country, time zone, and other display settings on this page. Keep in mind, these settings only affect the specific user's experience and do not affect other users.

Update Security Settings

The Update Security Settings menu contains pages for you to change your login password or the security question and answer associated with your user profile.

- **Change Password.** Select the **Change Password** page in the navigation. An overlay will display that allows you to change the password for the user account. You will enter and confirm a new password. Note: The password is not viewable in the user profile; it is always masked.
- **Change Security Question or Answer**. Select the **Change Security Question or Answer** page in the navigation. An overlay will display that allows you to select a security question and enter / confirm the answer.

User Roles and Access

This area is used to set your assigned roles, fulfillment centers, and sourcing customers to which you should have access.

- **Assigned Roles**: The user submitting the initial registration request for your JAGGAER ONE Supplier Network will be assigned the role of "Manage All Portal Activities". Additional users may register for the JAGGAER ONE Supplier Network and be assigned roles appropriately. To override the permissions assigned to any role or to request an administrator role, you'll need to contact your system administrator directly.
    - **Manage All Portal Activities**: The user with this role has permissions to view and take actions in most areas of the Supplier Network, including managing the Supplier Profile, Catalog Management, Reports, Customer Questions, and Orders/Invoices. A person with this role may be referred to as the **Administrator** of the site.
    - **Manage Content / Pricing**: This user may extract and edit catalog data, and view reports related to product data.
    - **Support Customer Questions**: This user may view and export all Sales Orders. User does not, by default, have permission to take any action within the Supplier Network related to Sales Orders.
    - **Manage Company Profile:** This user may edit the supplier's basic profile data which includes name, address, contacts, and other information.
    - **Manage Orders / Invoices**: This user may view and export Sales Orders per assigned Fulfillment Center, take action on Sales Orders per assigned Fulfillment Centers, and generate invoices from Sales Orders. Separate permission may be given to access all Sales Orders. Fulfillment Centers may be assigned in the "Sales Order" section of the user's profile, or by Fulfillment Center Access in the "Sales Order" tab.
    - **View Reports Only**: This user may view product level reports.
    - **Manage Bid Opportunities**: This user has access to their user profile and to Sourcing customer bid events the user was invited to. A user is given this role if the user account is created by way of a Sourcing customer invitation.
    - Refer to Default Permissions by Role in the Appendix to see the list of permissions associated with each of these roles.
- **Fulfillment Center Access**: This section is used to assign the user to specific Fulfillment Centers. If no Fulfillment Centers are checked, the user has access to all Fulfillment Centers. If some of the Fulfillment Centers are checked, the user has access to only those Fulfillment Centers.
    - **NOTE**: If the user has an **Manage All Portal Activities** or **Support Customer Questions** role, they are given access to all Fulfillment Centers by default. Other users must be assigned specific Fulfillment Centers in order to view or process sales orders for those specific Fulfillment Centers. For example, different users may track or process orders for different Fulfillment Centers created by customers. Customers may have more than one Fulfillment Center for a supplier. Check the appropriate Fulfillment Centers applicable to the User, and Save. You may also choose to assign users to Fulfillment Centers by Fulfillment center, and not on a user basis. To assign by Fulfillment Center, refer to the Sales Order section.

- **Customer Access:** This section displays the customers enabled for your supplier portal. You may receive sourcing events from these customers, and manage your company-specific profile for the customer. You may have access to all customers, or only the ones indicated with a green checkmark on this page.

Ordering and Approval Settings

View Assigned Approval Folders: If your JAGGAER ONE Supplier Network Portal utilizes workflow to process Sales Orders, you may have users assigned to approval folders associated with the workflow. Any approval folders assigned to the user will be displayed here, and a substitute approver may be assigned as appropriate.

Permission Settings

Your username will be assigned to one or more of the roles. Permissions are inherited from the Role, but can also be assigned/overridden at a user level. You will be able to view the permissions you have by navigating to Permission settings and selecting a specific permission area (Orders, Administration, Supplier Portal).

Permissions with green checkmarks (✓) are enabled – meaning you have those permissions. Permissions with red cross marks (✕) are disabled – so you do not have those permissions. For permissions that are enabled, you may select the **Show Details** hyperlink to see which roles are providing that permission to you. If you do not have permission(s) for a particular feature or action, contact your system administrator.

Refer to the Permissions section for more detailed information about each permission in the Supplier Network.

Notification Preferences

This section is used to determine the email or in-application notifications the user receives. It is important to check all that apply for data validation notification if the user is responsible for catalog management. For each preference, you may select to be notified via email, to receive a notification within your JAGGAER ONE Supplier Network, both, or neither. For example, you may choose to select to be notified via email if a submission completes and/or errors upon any of the submission steps. You may also choose to be notified when a price file is approved, rejected, or becomes active. **Best Practice**: As a new JAGGAER ONE Supplier Network user, select all of the Notification Preferences. Once you are familiar with the system you may unselect them.

User History

This page gives the user access to view the user profile history, as well as add comments to a user's profile.

Administrative Tasks

When viewing other user profiles, you will also see the appropriate Administrative Task options to

Activate, Inactivate, Resend a User Registration request, or Reject a user, depending on the user status.

View and Update the Profile

When first logging into the JAGGAER ONE Supplier Network, navigate to your user profile. Review the current information, making changes as necessary. At a minimum, basic information must be set up in a user's profile for a user to login and use the system. It is recommended to set up additional information prior to using the system so that the appropriate emails will be sent.

Step by Step

The goal of this exercise is for a user to access and view their profile, and update the appropriate areas. ONLY perform those tasks that are relevant for your organization and/or the user.

1. Access your profile. This can be accomplished in different ways:
    a. The first time that a user logs into the system, the user is navigated to the basic information page of the user profile.
    b. If you are on the home page of the Supplier Network, in the top right banner navigation, select your name and the link to **View My Profile**.
2. The **User's Name, Phone Number, Email, etc.** page displays.
3. To navigate to any of the profile pages, select from the links on the left. For example, select **Permission Settings** to expand that menu and navigate to a page.
    a. Once a screen is displayed, users with the appropriate permissions may edit fields.
    b. The Permissions and Notification Preferences pages display as read only initially. If you would like to change the setting, select the **Edit Section** hyperlink and select the appropriate Override option.
4. Tips for working within the user profile:
    a. Fields indicated with a star ★ are required.
    b. If any of the information is incorrect and you are unable to make edits, contact your system administrator.
    c. If the screen is editable, additions or modifications may be done directly within that screen of the profile.
5. Review and update your profile. You may navigate through each of the profile areas as described in Navigating the User Profile. Select to **Save** changes on each page you edit.
6. **Note**: The **Save** button must be selected on each screen for changes to be saved. Navigating to another screen without clicking the Save button will lose any changes made on the previous screen.

Changing Your Password

Occasionally you may need to change your password in the JAGGAER ONE Supplier Network Portal. For example, you may want to change your password on a regular basis for security purposes, or you may have forgotten your password. Once the password has been updated, the previous password will no longer work in the system. Two options for changing the password are detailed below.

Step by Step

The goal of this exercise is to change your password through one of the two methods explained below.

1. When you forget your password:
    a. From the Login screen, click the **Trouble Logging In?** link. The **Reset your password** screen displays.
    b. Enter the email address associated with your user and then click the **Send Email** button.
    c. A **Reset Password Email** will be sent. Click the **Reset Password** button in the email.
    d. After the page opens, enter the answer to the security question provided during registration, then a new password in both the **New Password** and **Confirm Password** fields.
    e. Click the **Change Password and Login** button. You will be logged into the Supplier Network.
2. When you know your current password:
    a. Login to the Supplier Network.
    b. Navigate to your profile by selecting your name in the top right banner area, then **View My Profile** link.
    c. Expand the Update Security Settings section in the left navigation. Select the **Change Password** page. (Note: If you do not see this option, you may not have permission to reset your password, and should contact your system administrator). An overlay displays.
    d. In the overlay, enter your current password in the **Old Password** field. Then enter the new password in the **New Password** and **Confirm New Password** fields.
    e. Click **Change Password** to save the new password. The password has been updated.

Permissions

Permissions determine what a user can do in the Supplier Network. Permissions are organized into areas of the application. Permissions can be assigned at both the role and user level. Permission access for a user is set up in the user's profile under **Permission Settings**.

Following is the full list of permissions, along with descriptions of each.

Orders Permissions

My Orders/Organization Orders

- **Export Search Results:** This permission provides the ability to export information from document search (sales orders and invoices).
- **Manage Company Exports**: This permission provides access to manage exports within your Supplier Network. Users with this permission will be able to see all exports from all users, and delete any export if necessary.
- **View Sensitive Credit Card Details**: Allows the user to view credit card information within the application. A user with this permission can see the full credit card number, expiration date, and card security code on documents in the application. This permission is OFF by default.

Orders: Sales Order Fulfillment

- **Fulfill Sales Orders**: With this permission, a user may fulfill orders sent to the Supplier Network portal by customers using JAGGAER products.
- **Create Order Acknowledgements**: Allows the user to create order acknowledgments from a sales order in the supplier portal.
- **Create Advanced Shipping Notice**: Allows the user to create advanced shipping notices from a sales order in the supplier portal.
- **Create Sales Invoices/Credit Memos**: Allows the user to create sales invoices and credit memos against sales orders. The sales order must have originated from a JAGGAER customer using Accounts Payable features in order to create a sales invoice or credit memo.
- **View Sales Orders**: Provides the ability for a user to search and view sales orders for fulfillment centers they have access to through Sales Order Document Search.
- **View all Sales Orders**: Provides the ability for a user to search and view all of the organization's sales orders, regardless of fulfillment center access assignments for the user.
- **Close/Complete Sales Order**: Controls the ability for the user to complete a sales order through the fulfillment process. Selecting to close/complete will update the status of the sales order and indicate that it has completed the fulfillment process.
- **View cXML Invoice Import History**: This permission is required to view the cXML Invoice Import History page, available at **Orders > Sales Invoices > cXML Invoice Import History**.

Administration Permissions

System Administration

- **Administration**: This permission allows a user to access and modify settings within the Administration application. Users must have this permission, in addition to other Administrative permissions, to access and modify any of the Administrative functions.
- **Manage Shared Workflow Folders**: Provides the user with access to manage the sales order workflow folders.
- **System Configuration**: With this permission a user has the ability to access and edit system configuration settings, including security and session settings, and language support.
- **License**: Allows a user to access the license section under **Setup**. The information is read-only.
- **Edit Items/Catalogs**: Provides access to catalog and pricing activities such as submitting and extracting data, adding attributes, and some catalog configurations. A user with this permission may validate and import data and pricing, but must also have Syndicate Items/Prices in order to publish the information to the database/customer.
- **Syndicate Items/Prices**: Provides the ability to promote item and price data, making the information available to JAGGAER customers.
- **Administer Shared Document Searches**: Provides the ability to edit and configure your Supplier Network saved document search list.
- **Create Shared Document Search Folders**: This permission allows users to create and administer their own shared saved searches folders.

Company 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 ONE 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.

Questionnaires

- **View Questionnaires**: Gives the user view-only access to any customer questionnaires in the customer's branded portal homepage.
- **Edit Questionnaires**: Gives user ability to edit customer questionnaires that are in an **Incomplete** status on the customer's branded portal home page. **Complete** and **Archived** questionnaires will show as read-only.

2nd Tier

- **Manage 2nd Tier Reporting**: Allows user to report and submit 2nd Tier spend data to a specific customer who has marked the supplier as a Prime supplier in the customer's supplier portal.

User Administration

- **View My Profile**: With this permission users may access and view information submitted when the user generated their user profile. This user profile is generated the first time a user logs in or completes registration in the application.
- **Edit My Profile**: When granted this permission users may access, edit, and update the information submitted in their user profile. In order to activate permission editing, the user must have the Edit All User Profiles/Roles/Permissions permission.
- **Change Password**: Users with this permission have the ability to change their password. If the user also has the access to other users' profiles, this person may change the passwords of other users.
- **Edit Personal Information**: This permission grants access to the **User Profile and Preferences** information in the User Profile. Information such as Language, Country, and Time Zone are managed from this page.
- **View All User Profiles**: This permission allows users to access and view user profiles of other users registered in your Supplier Network Portal.
- **Edit All User Profiles/Roles/Permissions**: With this permission users may access and utilize functionality to create, search for, and grant roles and permissions to users within your Supplier Network Portal.
- **Edit All User Profiles Only**: With this permission, users may edit the basic user profile information for all users, but cannot edit permissions or roles for the user.
- **Edit Roles**: Allows users to create and edit roles within the application. Permissions can be associated with roles that have been created within the Manage Roles page.
- **Delete a User**: Allows users to delete users from the system. Deleted users cannot be reactivated.
- **Edit Fulfillment Center Access**: This permission allows a user to determine who has access to which fulfillment centers for viewing/processing sales orders.

Supplier Portal Permissions

Content

- **Supplier Portal Reports**: The user can access and view the reports available in the supplier portal.
- **UOM Management**: This permission allows the user to manage UOM mappings within the Supplier Network Portal. Contact JAGGAER for assistance.

Enablements

- **Manage Customer Enablements**: This permission allows a user to manage the entry and editing of the **Supplier Enablement Profile** and **Customer Enablement** settings. These options are found under the **Tools > Customer Enablements** menu.

- **View Customer Enablements**: This permissions allows a supplier portal user to view the **Supplier Enablement Profile** and **Customer Enablement** settings. These options are found under the **Tools > Customer Enablements** menu.

Customer Access

- **Manage All Customers**: This permission allows a user with access to customer portals and sourcing events to access portals and sourcing activities for all customers.

Sourcing Events

- **View and Respond to Sourcing Events**: This permission allows a supplier portal user to view and access sourcing events to which they are invited. The user has access to the Sourcing Events dashboard on the home page, and can search for, view and respond to sourcing events from customers.

Contracts

- **View and Manage Contracts**: This permission allows the user to view and manage contracts that customers have shared in the portal.

Notification Preferences

You may select to receive an email or be notified in the application of certain events that occur. Navigate to your profile, and select a section under **Notification Preferences**.

A user will only see the notification preferences that are applicable to their role/permissions. Some notification preferences may be enabled for a role or based on user permissions, so the user will receive emails/notifications as per that criteria. The user may also select or deselect emails/notifications in their individual user profile.

When viewing your **Notification Preferences**, you will see the (Default) setting for the email preference that is based upon on your user role or permissions. You may choose to keep the Default setting, or select **Edit Section** to select another option.

Notification preference selections:

- **None** - no email or notification will be sent to the user for the selected action.
- **Email** - an email will be sent to the email address in the user profile.
- **Notification** - the user will see a notification in the Notifications area in the upper right banner of the network portal. Notifications specific to some customers will display in the customer portal.
- **Email and Notification** - the user will receive an email at the address defined in the user profile, and see a notification in the application.

Available Notifications

Administration and Integration

- **New User Registered** - Users are notified when another user creates an account because they were invited by a customer to manage the customer-branded profile.
- **User Registration pending approval** - Email to user profile approvers indicating there is a new user pending approval. This notification does not apply to supplier portals.
- **Order Failure Notification by Supplier** - If you have permission to manage order failures, you may choose to receive an email or notification when an order failure occurs.
- **Hosted Catalog Relationship Deactivated** - Notification that JAGGAER has deactivated a hosted catalog relationship with a customer.

Catalog Management

- **Submission Validation Complete** - Confirmation that a new submission file (content, price, image, structures) has completed validation.
- **Submission Import Complete** - Confirmation that a submission file has completed import. The file must complete syndication in order to be available to customers.
- **Submission Syndication Complete** - Confirmation that a submission file has completed syndication.
- **Submission Validation Error** - Confirmation that a submission file did not complete the validation process due to errors.
- **Submission Import Error** - Confirmation that a submission file did not complete the import process due to errors.
- **Submission Syndication Error** - Confirmation that a submission file did not complete the syndication process due to errors.
- **Price File Approved/Rejected/Live** - Confirmation of an action with a price file the supplier submitted. The user will receive this if a customer has approved or rejected a price file, or if a price file with a future effective date is live. This confirmation is also sent if a consortium member chooses to opt-in or out of the consortium pricing being shared from a consortium parent.
- **Content/Price File Extract Complete** - Confirmation that a content or price file extract requested by the user has completed and can be accessed on the extracts page in the portal.

Invoicing

- **Sales Invoice Import Detail Notification** - Confirmation indicating the results of the sales invoice validation and import when the request is complete.
- **cXML Invoice Daily Status Notification** - Suppliers with cXML invoice integration can choose to get a daily email that summarizes the number of requests submitted. The email includes information on the number of successful requests, and details on failed invoices as well as successful invoices with warnings.

- **New Message from Customer - Payment** - This message is sent when a customer posts a **Payment** message type on an invoice. (Note: the **Email and Notification** option is enabled by default for users with the **Manage All Portal Activities** or **Manage Orders/Invoices** role.)
- **New Message from Customer - Invoice** - This message is sent when a customer posts an **Invoice** message type on an invoice. (Note: the **Email and Notification** option is enabled by default for users with the **Manage All Portal Activities** or **Manage Orders/Invoices** role.)
- **New Message from Customer - Other** - This message is sent when a customer posts an **Other** message type on an invoice. (Note: the **Email and Notification** option is enabled by default for users with the **Manage All Portal Activities** or **Manage Orders/Invoices** role.)
- **Invoice Dispute notification** - This message is sent when a customer posts a **Dispute** message type on an invoice. (Note: the **Email and Notification** option is enabled by default for users with the **Manage All Portal Activities** or **Manage Orders/Invoices** role.)
- **Invoice Cancel/Reject Notification** - This email provides information about Supplier Portal invoices that a customer has rejected or cancelled.

Contracts

- **New Contract Communication** - receive an email alert and/or in-app notification when a new message is received for a contract. The message will display in the Communication Center regardless if the notification is enabled or not. You will also receive an email communication if the customer has your email address included in the communication, regardless of the notification setting.

Sourcing Events

- **Confirmation that the Supplier Has Submitted a Bid** - Informs the user a bid response has been successfully received by the customer organization.
- **Response to a Sourcing Event-related question received** - Informs the user that a customer has responded to a question on a sourcing event.
- **Buyer Has Submitted an Event-Related Question** - Informs the user that a customer has submitted a question via the sourcing event question and answer board.
- **Proxy Bid has been received by the buyer** - Informs the user that a customer has started a proxy bid for the supplier on a sourcing event.
- **Sourcing - Exports** - Notifies the user that an export request for a sourcing event has completed.
- **Sourcing - Imports** - Notifies the user that an import request for a sourcing event has completed.
- **Sourcing - Validation** - Notifies the user that a validation request for a sourcing event has completed.
- **Upcoming Launch of Event Auction phase** - Notifies the user that the auction phase of an event will start in 24 hours.

Sales Orders

- **Sales Order received from a customer** - Confirmation that the system created a sales order for the supplier from a customer’s purchase order.

- **Customer Cancelled Line on Sales Order** - This notification alerts the user when a customer has cancelled a line on a sales order.
- **Sales Order Revised by Purchase Order** - Alerts the user when a sales order is revised from a purchase order.
- **Shipment Due Reminder Received from a Customer** - This notification alerts the user that a receipt has not been created after the ASN (Advanced Shipping Notice) delivery date has passed in order to help identify possible failed shipments or issues with transportation.

Supplier Management > General

- **Supplier Portal Cold Registration - Complete** - Users subscribing to this preference will be notified when a supplier user completes the "Certify and Submit" step of profile registration in the customer portal that originated from the customer's website registration process. This email is sent only if the registration was started from the customer's website (i.e. "cold" registration).
- **Supplier Payment Information has been edited** - Enable this preference to receive notification when information on the **Payment Information** page of the Customer Branded Registration Profile has been changed.
- **Supplier Registration - Complete** - Users subscribing to this preference will be notified when a supplier user completes the "Certify and Submit" step of profile registration in the customer portal that originated from a customer invitation email. This email is sent only if the registration is based on an invitation from a Supplier Management customer.
- **Supplier Registration - Returned** - This notification is sent when an organization has returned your submitted registration. If the customer does not include a note explaining the reason, you should contact the customer directly.
- **Supplier Registration Duplicate Found** - This email/notification is sent to the user when another user attempts to register with a customer organization but the supplier already exists in the Supplier Network or for a specific customer. The supplier network administrator will receive this notification by default. The user attempting to submit the registration may then be contacted by someone within the Supplier Network with appropriate next steps.
- **Supplier Diversity Certification Expiring Notification** - This email/notification indicates to the user that a diversity certification will expire soon. The notice is sent based on a specific customer's configuration of when to send the warning email: 30, 60, or 90 days prior to the expiration date. This notification is on by default for users with the **Manage All Portal Activities** role, but can be disabled at the user or role level.
- **Supplier Diversity Certificate Has Expired Notification** - Supplier users can subscribe to this notice in order to receive notices when a supplier's diversity certificate has expired in a customer portal profile. This notification is on by default for users with the **Manage All Portal Activities** role, but can be disabled at the user or role level.
- **Supplier Insurance Certification has Expired** - Supplier users can subscribe to this notice in order to receive notices when a supplier's insurance certificate has expired in a customer portal profile. This notification is on by default for users with the **Manage All Portal Activities** role, but can be disabled at the user or role level.
- **Supplier Insurance Certification Expiring Notification** - This email/notification indicates to the user that an insurance certification will expire soon. The notice is sent based on a specific

customer's configuration of when to send the warning email: 30, 60, or 90 days prior to the expiration date. This notification is on by default for users with the **Manage All Portal Activities** role, but can be disabled at the user or role level.

- **Supplier Questionnaire Sent From Customer** - Subscribe to this notice in order to receive emails/notifications when a Questionnaire has been assigned to your organization.

Supplier Management > 2nd Tier

- **Reporting Period to Open Notification** - This message is used to remind the prime supplier to begin gathering the spend data so they can report 2nd Tier Spend.
- **Reporting Period Open Notification** - The reporting period for entering your 2nd tier data is now open.
- **Reporting Period Open Reminder Notification** The first reminder that your reporting period is open.
- **Reporting Period Closing Reminder Notification** - The reporting period for entering your 2nd tier data is closing soon.
- **Reporting Period Closed Notification** - The reporting period for entering your 2nd tier data is now closed.
- **Supplier Import Error Notification** - An error was found while importing the supplier information for 2nd tier reporting.
- **2nd Tier Reopening Reporting Period** - A reporting period has been reopened.
- **Supplier Reporting Period Data Deleted** - Notifies the supplier that their reporting data has been deleted by the customer as a result of changing the data collection criteria.
- **Reporting Period Reopen Request Rejected** - Notifies the supplier when a customer rejects the reopen request for any reporting period.

MANAGING THE SUPPLIER PROFILE

This lesson includes information about the Supplier Network Profile, where you can manage important company and business information, addresses and contact information.

SUPPLIER NETWORK PROFILE

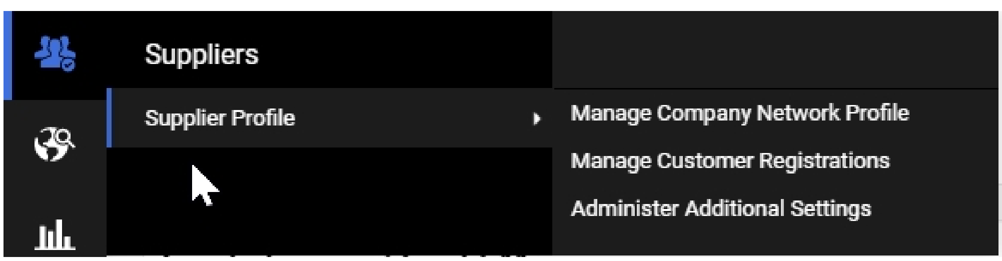
Within your JAGGAER ONE Supplier Network Portal, you may manage basic information about your supplier organization such as name, addresses, service areas, legal identification, diversity classifications and more. This is known as your Network Profile.

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.

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.

- **Company and Business information for suppliers with international locations**: Customers can choose to include fields that apply to suppliers located or doing business outside of the United States such as Supplier Registered Seat, Supplier Capital, VAT information, etc. These fields are located in the Company Overview and Business Details pages, if made available.
- **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 JAGGAER ONE 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 JAGGAER ONE 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 JAGGAER ONE Supplier Network complete profiles for each Customer Branded Portal with which they have a relationship. The JAGGAER ONE 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 JAGGAER ONE 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.

Adding and Editing Company Overview Data

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Company Overview tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to modify **Company Overview** information in the Network Profile. For more information on the fields available in this tab in either the Network Profile or Customer Branded Portal view, see **Supplier Profile Fields**, on page 230.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Company Overview** tab.
3. **Legal Company Name** is required. All other fields are optional.
4. The selection for **Country of Origin** may determine the **Legal Structure** and other options available.
5. You must select **Yes** for **Does your business have a DUNS number?** in order to see the **Dun & Bradstreet Number (DUNS)** field.
6. The **Legal Structure** selected will determine the tax documents available to you on the Tax Information page. It also determines whether or not a Tax ID Number is required. **Note**: The options in this field are determined by the selected **Country of Origin**. You must first have a **Country of Origin** selected in order to see **Legal Structure** options.

7. If Individual/Sole Proprietorship is selected as the **Legal Structure**, you will be asked to select a **Tax ID Number Type**.
    a. If you select a **Tax ID Number Type** of Social Security Number / Social Insurance Number, the value in the **Tax ID Number** field will be masked.
    b. If you have permission to View TIN/SSN, upon save, a view icon displays so you may view the SSN value.
8. Select if you are exempt from backup withholding.
9. You may select to upload a Backup Withholding Attachment.
10. Enter the website for your organization.
11. Select **Save** after all changes have been made.
12. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Business Details Data

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Business Details tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to modify **Business Details**. For more information on the fields available in this tab in either the Network Profile or Customer Branded Portal view, see **Supplier Profile Fields**, on page 230.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Business Details** tab.
3. **Year Established** cannot be in the future.
4. For **Annual Revenue/Receipts**, select the appropriate currency. The page will automatically display the past three years.
5. Select if you are a **Local** and/or **National** supplier.
6. You may select one or more values for the **U.S. Service Area** and/or **International Service Area** by selecting the **Edit** button next to each field.

7. You may select a single **Primary NAICS code** and multiple **Secondary NAICS codes** by selecting the **Edit** button next to each field.
    a. You must select a Primary NAICS code for the Secondary NAICS selection option to show.
    b. Search for NAICS codes by code, name or keyword.
    c. You may remove a primary NAICS code if you have no secondary NAICS codes saved.
8. Enter **Keywords** if appropriate.
9. As changes are made, select to **Save** your changes
10. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Addresses

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Addresses tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to add or edit **Addresses**. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Addresses** tab.
3. If addresses exist for your organization, you may Edit the address by selecting the **Edit** button for the address row.
    a. If an address is duplicated for more than one Address Type, you may make changes to the address for all types at once.
    b. Edit and **Save Changes**.
    c. Once saved, you cannot edit the **Address type**.
    d. To make an address the primary for the address type, select **Yes** for the **Primary** field. The primary indication will be removed from the previously indicated primary address of that type.

4. If no addresses exist or you need to add a new address, select to **Add Address**. An Address wizard opens to allow entry of addresses and associated information:
    a. Step 1 of 4: Basic Information
        i. Enter a label for the Address (this information is required).
        ii. Select the business activities that take place at this Address, which determines the Address Type (you may select one or more):
            - Takes Orders (Fulfillment Address)
            - Receives Payment (Remittance Address)
            - Other (Physical Address)
        iii. When done, select the **Next** button to proceed to the next step.
    b. Step 2 of 4: Address Details
        i. If you selected that the address **Takes Orders**, you may select an option for **How would you like to receive purchase orders for this fulfillment address**. Select from the dropdown list. You will be prompted to enter additional information, depending on your selection.
        ii. Enter in remaining address details as appropriate.
            - The State/Province selection is determined by the Country selection.
            - The Postal Code is validated for format if the Country selection is USA or Canada.
        iii. Note: Some customers may require a specific zip code format.
        iv. When done, select the **Next** button to proceed to the next step.
    c. Step 3 of 4: Primary Contact for this Address
        i. If you'd like to add a new contact to associate with this address, select **Enter New Contact** and enter a Label for the Contact - along with any other appropriate information. When done, click **Next** to proceed to the next step.
        ii. If you do not have a new contact for this address, select **Not Applicable** and click **Next** to proceed to the next step. You can associate an existing contact to this address by navigating to the Contacts tab and selecting to edit the appropriate Contact name.
    d. Step 4 of 4: Assign Address to a Location
        i. You may select to **Use Existing Location** to associate a location currently in your profile with this new address. Select the location from the dropdown.
        ii. If you need to enter a new location to associate with this address, select **Enter New Location** and complete the appropriate

information. You can associate an existing location to this address by navigating to the Locations tab and selecting to edit the appropriate Location.

iii. Click the **Save Changes** button to complete the address and associate entries.

5. As changes are made, select to **Save** your changes.
6. Confirmation message(s) display for the address, contact and locations added/updated, as appropriate.
7. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Contacts

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Contacts tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to add or edit **Contacts**. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Contacts** tab.
3. If contacts exist for your organization, you may edit the contact by selecting the **Edit** button for the contact row or the Contact Label.
    a. Edit and select the **Save Changes** button.
    b. Once saved, you cannot edit the **Contact Type**.
    c. To make a contact the primary contact for that type, select **Yes** for the **Primary** field. The primary indication will be removed from the previously indicated primary contact of that type.

4. If no contacts exist or you need to add a new contact, select to **Add Contact.**
    a. Select the Contact Type from the list.
    b. Enter a **Contact Label**.
    c. Enter in appropriate detail for the contact.
5. As changes are made, select **Save Changes**.
6. Once the contact is saved, you may associate an address with the contact.
    a. Select the dropdown for the **Edit** button and click on **Manage Associated Address(es)**.
    b. An overlay shows if an address is currently associated with the contact. If not or if a change is required, click the **Edit** button.
    c. The current addresses saved for the supplier organization display.
    d. Select the appropriate address, and click **Done**.
    e. Click the **Save Changes** button to save the changes.
7. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Locations

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Locations tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to add or edit **Locations**. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Locations** tab.

3. If Locations exist, you may edit the location by selecting the **Edit** button or the Location Label for the row.
   a. Edit and make changes.
   b. To make a Location the primary Location for that type, select **Yes** for the **Primary** field. The primary indication will be removed from the previously indicated primary location of that type.
4. If no locations exist, select the **Create New Location** button. If you need to add a new Location, select the **Add Location** button.
   a. Select a Location Type from the list.
   b. Enter a **Location Label.**
   c. Enter in appropriate detail for the Location.
   d. Assign Addresses to the Location:
      i. Select the **Edit** button for **Assigned Addresses**.
      ii. Select an address from the overlay. You may select one address of each type.
      iii. Click **Done** when finished selecting addresses.
   e. Assign Contacts to the Location:
      a. Select the **Edit** button for **Assigned Contacts**.
      b. Select contacts from the overlay. You may select multiple contacts.
      c. Click **Done** when finished selecting contacts.
5. As changes are made, select the **Save Changes** button.
6. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Diversity Data

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Diversity tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to add or edit **Diversity** information. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Diversity** tab.
3. Select if your business qualifies as a Diverse Supplier, if the option exists.
4. If the information you have provided for the number of employees, NAICS code(s), and annual revenue, your company may qualify as a Small Business Enterprise. If so, you may see a message indicating your company meets the requirements (the message display is configurable by customer). You may also manually select or remove the SBE classification.
5. If Diversity Classifications exist, select a classification or the **Edit** button for the row to see Diversity Classification information. Complete the necessary edits and click **Save Changes.**
6. If no Diversity Information exists or you need to add a new Diversity Classification, click the **Add Diversity Classifications** button. An overlay opens listing all available Diversity Classifications:
    a. Classifications are listed in sections for **No Classification** options, **Federal Diversity Classifications**, **State Diversity Classifications**, and **Other Diversity Classifications**.
    b. All Diversity Classifications are available in the Network Profile. Contact JAGGAER Support if you do not see a classification listed that applies to your organization.
    c. Only those classifications enabled by a customer will display in a Customer's Branded Portal Registration.
    d. Several classifications can be selected in the overlay.
    e. Once selected, click **Done**. The overlay closes, and warning messages will display on the page for any classifications that require additional information. The Diversity section of the profile will not be considered complete until all required information for the selected classifications has been completed.
        i. Select the **Edit** dropdown button for a classification to provide additional information.
        ii. Additional information may include certifying agencies, and certification expiration dates.
        iii. You can Upload a Certificate as follows:
            - Click the **Select file** button, and choose the appropriate file from your computer or device, OR
            - Drag and drop the file on your computer or device into the gray area next to **Select file**.
            - You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself
7. As changes are made, select to **Save Changes** your changes.
8. You may remove the classification by selecting the **Delete** button or the **Delete** action in the **Edit** dropdown on the Classification row.

9. **Note**: You cannot select or delete the Small Business Enterprise classification. This classification is automatically configured based on your organization's NAICS code, number of employees, and annual sales.
10. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Adding and Editing Insurance Data

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Insurance tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

Step by Step

The goal of this exercise is to add or edit **Insurance** information. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Insurance** tab.
3. If Insurance Information exists, select a value in the list or the **Edit** button on the row to see information.
    a. Edit and select to **Save Changes**.
    b. To delete the record, select **Delete** action from the **Edit** dropdown.
4. If no Insurance Information exists or you need to add new Insurance Information, click the **Add Insurance** button.
    a. Select the appropriate **Insurance Type** (i.e. Liability, Property Damage, etc.). This field is required.
        i. If an insurance type is not listed, select **Other**.
        ii. Enter in a value for the Insurance type.
    b. Enter the **Insurance Limit** from the available values. This field is required.
    c. Enter other appropriate information.

d. You can **Upload Certificate of Insurance**, if applicable, as follows:

- Click the **Select file** button, and choose the appropriate file from your computer or device, OR
- Drag and drop the file on your computer or device into the gray area next to **Select file**.
- You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself.

5. As changes are made, select **Save Changes**.
6. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

- When selecting to include an attachment in a profile field, the user can associate the attachment in either of these ways:
  - Click the **Select file** button, and choose the appropriate file from your computer or device.
  - Drag and drop the file on your computer or device into the gray area next to **Select file**.
- You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself. For example, you may load up a document that is "RequestedReferences.docx". Once associated, you can edit the document name to be "References" only. When the documented is downloaded or opened, it will have the title RequestedReferences.docx.

Adding and Editing Payment Information

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Payment Information tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display in the left navigation. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

NOTIFICATION WHEN CUSTOMER BRANDED PORTAL PAYMENT INFORMATION CHANGES

Supplier users with the appropriate permissions can see changes to profile information, and see who made the change and when it was made. Also, users can be notified when changes are made to **Payment Information** in the Customer Branded Portal. This helps protect against potential unauthorized changes or issues if the customer attempts to pay the supplier using incorrect information. The notification is sent when a change is made (by a customer or supplier) to the **Payment Information** in the customer branded profile once the profile is in **Complete** or **Approved** status.

The notification preference for **Supplier Payment Information has been edited** (My Profile > Notification Preferences > Supplier Management) is enabled default for Supplier users with the Manage All Portal Activities or Manage Company Profile role, and to the primary portal contact. It can be enabled in the user profile or at the role level for other users.

Step by Step

The goal of this exercise is to add or edit **Payment Information**. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Payment Information** tab.
3. If Payment Information records exist, select a value in the list or the **Edit** button on the row to see information.
    a. Edit and make changes.
    b. To inactivate a Payment Information record, select **No** for the Active field.
    c. Select **Save Changes**.
4. If no Payment Information exists, click the **Create Payment Information** button. If you need to add an entry to the list, click the **Add Payment Information** button.
    a. Select from the Payment Types. Once selected, this cannot be changed. An overlay displays to enter the remaining information about the Payment Type.
    b. Enter a **Payment Title**. This field is required.
    c. Select a **Country** for the payment type. Country selections display depending on the payment type.
    d. Fields display depending on the Payment Type selected. Enter appropriate information for the remaining fields. Required fields are indicated with a star.
    e. As changes are made, click the **Save Changes** button to save your changes
5. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file. Note: In order to view the bank account information, you must have the permission to **View Sensitive Bank Information**.

Adding and Editing Tax Information

The goal of this exercise is to add and/or edit your JAGGAER ONE Supplier Network profile data on the Tax Information tab. **Note**: You must have the **Edit Company Profile** permission enabled to complete this task.

Note: If you are managing multiple companies within a single network portal, a **Change Supplier View** drop-down option will display. Select the company you wish to update. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.

SIGNING TAX DOCUMENTS VIA DOCUSIGN

Customers can enable an option to allow tax documents to be signed via **DocuSign**. Customers must configure this option to be available to suppliers. If enabled, users will see a **Sign Document** button when adding or editing tax information. When this button is selected, you will be prompted to save the Tax Record and then proceed with the signing the document via DocuSign.

The **Tax Information** page in the **Supplier Profile** includes a column for **Signature Status.** This column indicates if the document has been signed via e-Signature, DocuSign, or not signed.

Step by Step

The goal of this exercise is to add or edit **Tax Information**. For more information on the fields available in this tab, see Supplier Profile Fields.

1. Access the Network Profile by selecting the link to **View Your Company's Network Profile** on the home page, or navigating to **Suppliers > Supplier Profile > Manage Company Network Profile**.
2. Select the **Tax Information** tab.
3. If Tax Information Exists, select a value in the list or the **Edit** button or Tax Document Name associated with the row to see information.
    a. Edit and make changes.
    b. Select **Save Changes** button to save your changes.
4. If no Tax Information exists or you need to add new, click the **Add Tax Document** Button.
    a. Select a **Document Type**. This field is required and indicates the type of tax form (W-9, W-8, etc.) To designate the tax type, select the appropriate option from the drop-down menu. When you select a tax type, you have the option to create a pre-populated tax form for that type. For example, if you select W-9, you can create a W-9 form that includes data such as Supplier Name, Business Name, Federal Tax Classification, Address, etc.. When you select the type, an overlay for **Add Tax Document** displays. A link for **Download Pre-populated Tax Document** is available in the overlay. Click on the link and open or save the document to your own system. The document will need to be uploaded to the application as you would any other document. Follow the instructions in **Tax Documentation** below to upload the document. **Important Note**: Once the tax information has been saved, the Document Type cannot be edited.
    b. Enter a **Document Name**. This information is required.
    c. Select the **Tax Document Year** from the dropdown.
    d. The **Signature Status** displays depending on the status of the document associated with the record. It is read only.

e. Depending on the customer's configurations, you can add **Tax Documentation** as follows:

   i. **Sign Document** - If the organization has enabled DocuSign, click the **Sign Document** button. A confirmation will display asking you to save the tax record. Click Yes to continue. The DocuSign window will then open and direct you to complete the signature process on behalf of the supplier. When the signing process is complete, you will be directed back to the overlay, and the Signature Status will indicate DocuSigned and you can click **Save Changes** to save the tax record.

      - **Editing a DocuSigned document** - select from the Actions dropdown button next to the Signed Document text to Download, Sign a New Document, or Delete the signed document. The Signature Status will update accordingly.

   ii. **Manually upload the document instead** - Select this option to manually upload a document. The **Select file** button will display. Click on the file to be attached or **drag and drop** the file into the gray area next to **Select file**. You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself.

      - You can also choose to **Download a Pre-populated Tax Document**. This downloads a copy of the tax document with appropriate supplier profile information populated.
      - When manually adding a file, you may also be prompted to select **I certify this tax document.** This allows you to certify the information you are providing is true. If you select to certify, you will be required to enter your portal password as your eSignature for the certification. For additional information about eSignature, see eSignature Documents in Customer Registrations.
      - **Editing a manually uploaded document** - You can remove the attachment by selecting the **x** button, or replace it with another file.

f. If you need a form, select to link to navigate to the **irs.gov** website to download appropriate forms.

g. As changes are made, select the **Save Changes** button to save your changes

h. Verify changes are logged on the **History** tab. You can filter the history by date and export it to a .csv file.

Visibility in the JAGGAER ONE Supplier Network Directory

The JAGGAER ONE Supplier Network Directory displays a listing of all JAGGAER suppliers to JAGGAER customers, allowing them to view suppliers who are available for enablement.

By default, all JAGGAER customers can see your company as an available supplier. In some cases, however, suppliers wish only to be viewed by organizations with which they have a JAGGAER relationship. Through supplier profile management, you have the ability to change the default and be viewed only by JAGGAER customers with which you are enabled as a supplier. **Important Note**: If you uncheck this option, you may get invited to create a portal by an organization that cannot view your company.

If you manage multiple supplier organizations through a single Supplier Network portal, you will have the ability to toggle between the supplier organizations and determine the visibility for each.

Step-by-Step

The goal of this task is to change your company's visibility in the JAGGAER ONE Supplier Network.

1. Navigate to **Administer Additional Settings** from the **Suppliers > Supplier Profile** menu.
2. If you are managing multiple companies within a single Supplier Network Portal, select the appropriate company from the **Change Supplier** drop-down option. If you are managing only a single company, the name of the company will display by default and you will not need to make a selection.
3. Note the setting for **Publish my company profile in the JAGGAER ONE Supplier Network Directory**
    a. If enabled, your supplier profile is currently being published to the network of all JAGGAER customers with the ability to manage supplier catalogs.
    b. If not enabled, your supplier profile is currently being seen by only the customers with whom you have a relationship.
4. Enable/Disable the checkbox to make changes to the setting.
5. Click **Save**.
6. You may view a history of changes to this setting by selecting the **History** tab. You can filter the history by date and export it to a .CSV file.

CUSTOMER PORTAL & REGISTRATION

This section provides information on the Customer Portal that some customers may configure for their suppliers. You can access the customer portal from within the JAGGAER ONE Supplier Network. In this lesson will find information about navigating in the customer portal, as well as completing the registration process with a customer inside the portal.

CUSTOMER REGISTRATIONS

Customers with appropriate licenses may configure a supplier portal that you may access through the JAGGAER ONE 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.

Viewing Customer Registrations

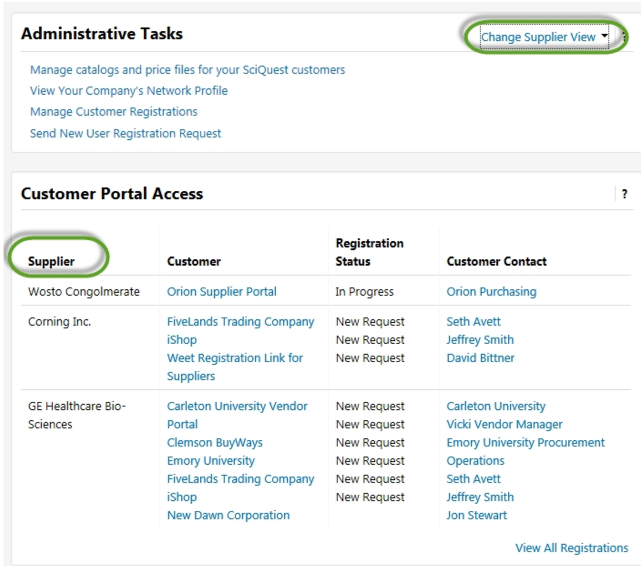
You may quickly view the customers with a supplier portal in the **Customer Portal Access** widget on your home page. Select a **Customer Name** to navigate to the Customer Branded Portal. Note the **Registration Status**. Select a **Customer Contact** to see the contact's information and to send an 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 ?

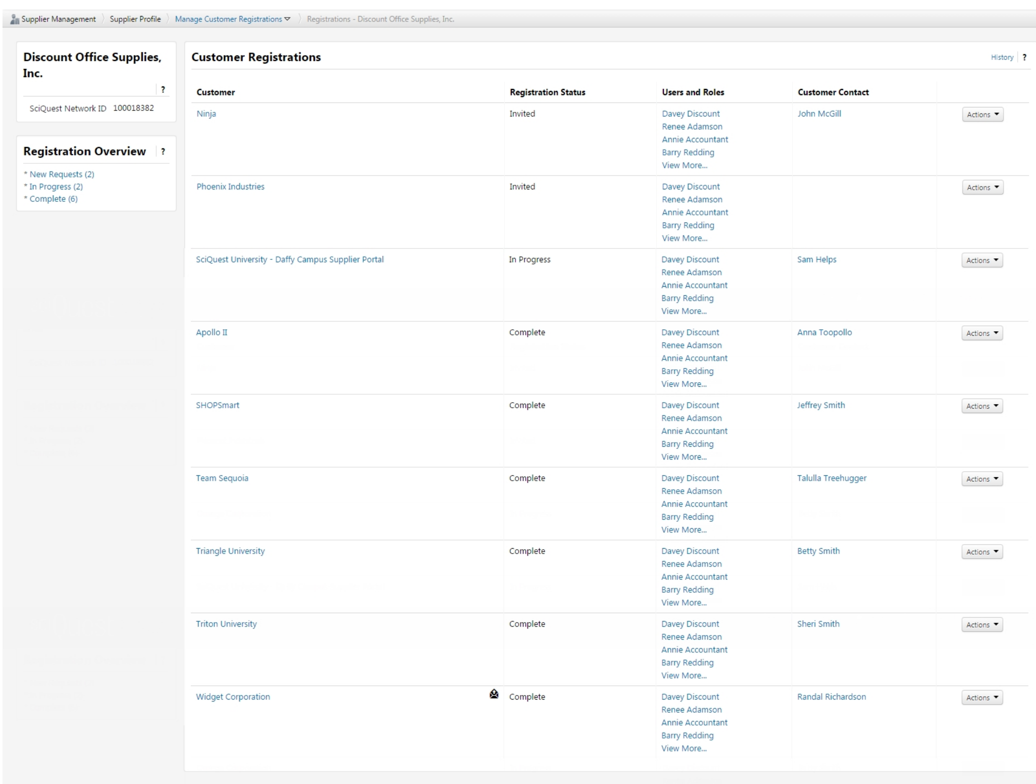
Customer	Registration Status	Customer Contact
Contract University	Invited	
Ninja	Invited	John McGill
Phoenix Industries	Invited	
Omega Corporation	In Progress	Betty Smith
SciQuest University - Daffy Campus Supplier Portal	In Progress	Sam Helps
Apollo II	Complete	Anna Toopollo
SHOPSmart	Complete	Jeffrey 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**.



On the **Customer Registrations** page, you see the **Registration Status** for that customer. You may also select a status option on the left under **Registration Overview** to expand the list of customer registrations in that status.

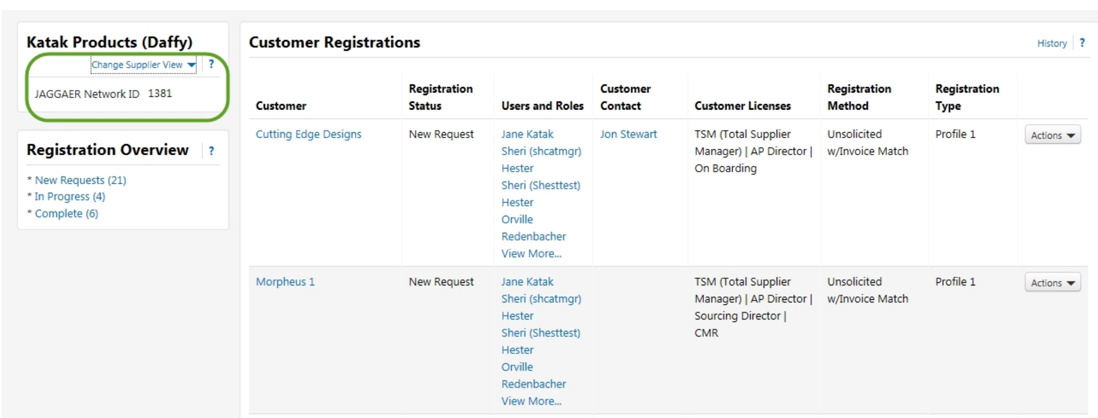
The **Users and Roles** column displays the users within your Supplier Network Portal who have access to the Customer Branded portal. Up to 5 users are displayed per customer, with a **View More...** hyperlink to display additional users for the customer. Select the user's name to see an overlay with their phone number, email address, and assigned role. Selecting the email address will open your email client in order to send an email to the user.

The **Customer Contact** column displays the user the customer has indicated is the main contact for the Customer Branded Portal. Click the contact name to see an overlay of the contact's name, phone number, and email. Selecting the email address will open your email client in order to send an email to the contact.

You may deactivate and activate registrations by selecting the **Action** button for the customer, and choosing the appropriate option based on the current status:

- **Make Inactive**: If the customer is currently Active, selecting this option will make the customer registration inactive. It will no longer show in the list of Customer Registrations by default. Inactive registrations do not show in the Customer Portal Access on the home page.
- If any customer registrations are inactive, a link to **Show Inactive Registrations** shows on the **Manage Customer Registrations** page. Selecting this link will show inactive registrations with a status indicated as **(Inactive)**, and provides the Actions option to **Make Active**.

If you manage multiple suppliers within your Supplier Network Portal, the Manage Customer Registrations page will initially display all customer branded portals, organized by Supplier.



You may collapse or expand the list by supplier, or select a supplier from the **Change Supplier View** drop-down to see the list for a specific supplier. page. The JAGGAER Supplier ID for each supplier is listed.

CUSTOMERS CAN RE-INVITE SUPPLIERS AFTER REGISTRATION STARTED/COMPLETED

Customers may have instances where the wrong form was used to invite the supplier, or may utilize the multiple profile forms in different ways, creating the need for greater flexibility with registered suppliers.

Therefore, a customer has the ability to send a new invitation to a previously invited or registered supplier to complete a different profile form. You will receive the same registration email as was sent for the original invitation. You may see additional fields displayed and/or required for completion when viewing the customer specific profile.

Customer-specific Login URLs

You may navigate to a customer's portal from within your JAGGAER ONE 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 ONE 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

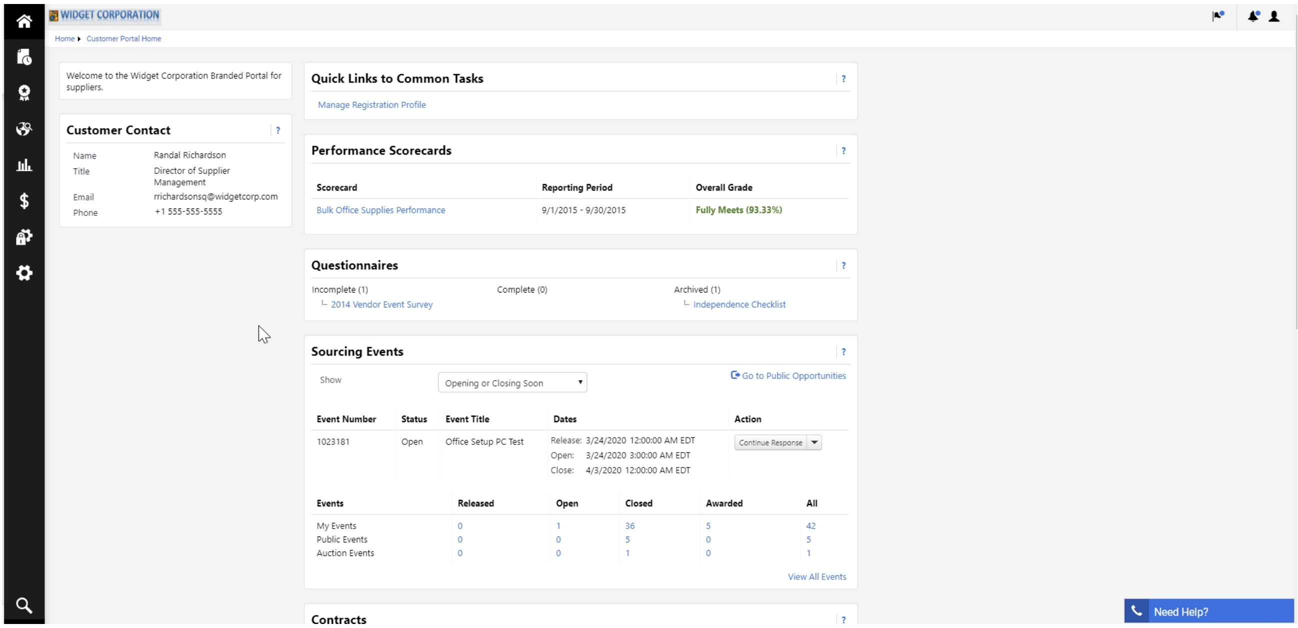
If a customer removes the relationship with a supplier who had access to the Customer Branded Portal, the supplier user will receive a message upon attempting to log in to the portal that the account has been deactivated. A similar message displays when attempting to access a deactivated account from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

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

Customer Portal View

When you have selected to navigate to the customer portal within the JAGGAER ONE 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 JAGGAER ONE 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 JAGGAER ONE 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 JAGGAER ONE Supplier Network Home page.
   b. **Orders**. 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. **Catalogs and Contracts**. Allows a user to search the contracts only for this customer. This icon will not show if there are no contracts available from the customer via the portal.
   d. **Sourcing**. Navigate here to search for Sourcing Events for this customer.
   e. **Reporting**. Navigate to Performance Scorecard reports from the customer.
   f. **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.

g. **Administer**. Navigate here to **Send New User Requests** and see **Pending User Registrations**. For information on sending and managing user requests, see User management.

h. **Registration**. In this area you may navigate to the registration profile for this customer.

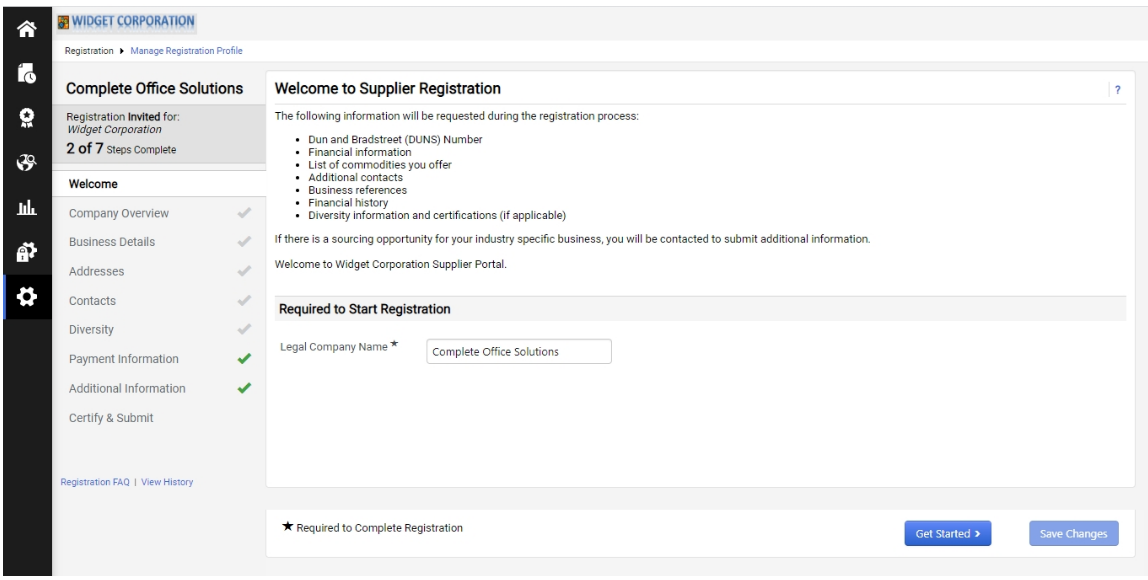
i. **Menu Search**. Use this feature if you are unsure of the location of a specific menu within the customer portal. This is a keyword search that returns a list of pages containing that keyword. You can click on the search results to navigate to the appropriate page.

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 hyperlink 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 JAGGAER ONE Supplier Network or to Logout. Please note that user profile management is only available through the JAGGAER ONE 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).

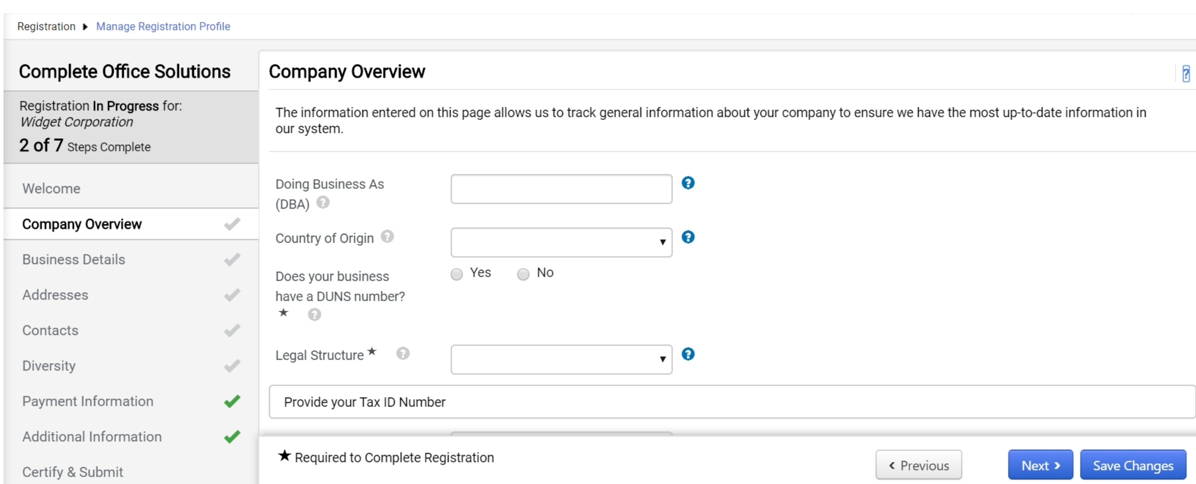
The Customer Specific Profile

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.

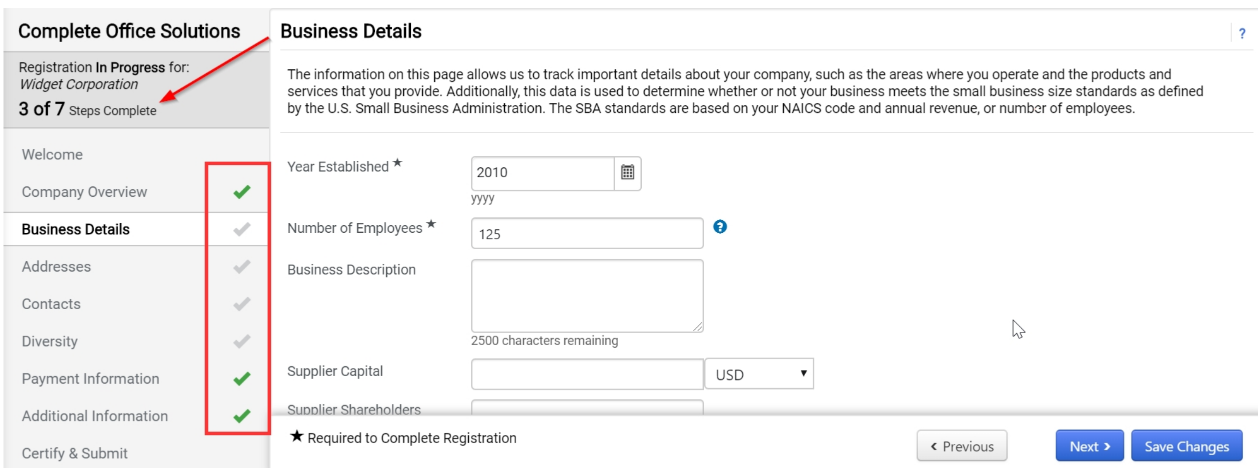


Required Permissions

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

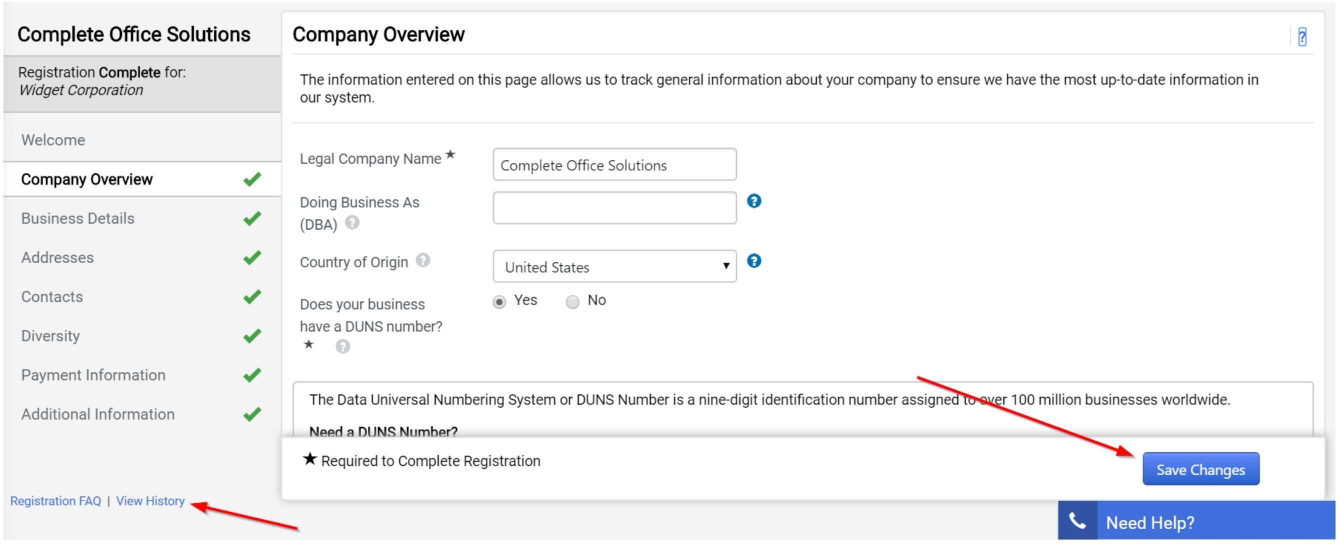
Completing the Customer Registration

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 ONE Supplier Network**.

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-specific profile may contain fields not present on the Network profile**. For example, customers with the Global Invoicing solution may include fields specific to suppliers doing business internationally, such as Supplier Registered Seat or VAT information.

- **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.

Customer Specific Profile Edits

After you have submitted your registration and are in an ongoing relationship with a customer, you may need to make changes to your profile information from time-to-time. Also, the customer may make changes to your profile information.

SUPPLIER EDITS TO CUSTOMER SPECIFIC PROFILE

You may make changes to your customer specific profile at any time. If changes are made after your registration is submitted to the customer for approval, the customer may choose to review and approve some or all data in your profile. If the customer has chosen to review and approve a profile field change, the change will not be live in the customer's organization until the customer has approved the change. If the customer has not chosen to review and approve a field change, the change takes place upon selecting to Save the edit in the customer specific profile.

If you see a change you made is not effective, you may select the **View History** link to see if the customer declined the change. When viewing the history log, Declined will be indicated in the Note field. Any change noted as Declined will not change the information in the supplier's profile for that customer.

CUSTOMER EDITS TO THE CUSTOMER SPECIFIC PROFILE

The customer may edit information in the customer specific profile that is visible to them in their organization. When a customer makes a change to a profile field that is available in your customer portal, you will see the change immediately. You may see who made the change and when the change was made by selecting the **View History** link when in the customer-specific profile.

Discount Office Supplies, Inc. - Profile History

› Filter History — Export CSV

Results Per Page 50 — **Records found: 201** — Page 1 of 5

Date	User	Action	Section	SubSection	Field	Old Value	New Value	Note
10/8/2019 4:25 PM	Larry Eckerlin *(customer)*	Modified	Addresses		State/Province : Remit South	SC	South Carolina	
10/8/2019 4:25 PM	Larry Eckerlin *(customer)*	Modified	Addresses		Country : Remit South	*empty*	US	
4/9/2019 9:32 AM	Sheri Hester	Modified	Addresses		Delivery Target : Fulfillment Address 1	*empty*	shester@jaggaer.com	
4/9/2019 9:32 AM	Sheri Hester	Modified	Addresses		How would you like to receive purchase orders for this fulfillment address? : Fulfillment Address 1	*empty*	Email	
3/26/2019 1:19 PM	Davey Discount	Modified	Insurance		Upload Certificate of Insurance : Business Owner	*empty*	SampleDoc.pdf	
3/26/2019 1:19 PM	Davey Discount	Modified	Insurance		Insurance Provider Phone : Business Owner	*empty*	- - -	
3/26/2019 1:19 PM	Davey Discount	Modified	Insurance		Insurance Provider : Business Owner	*empty*	Business Insurers Inc	
3/26/2019 1:19 PM	Davey Discount	Modified	Insurance		Expiration Date : Business Owner	*empty*	3/30/20	
3/26/2019	Davey	Modified	Insurance		Insurance Limit : Business Owner	*empty*	$500,000 or Less	

Addresses, Contacts and Locations in the Branded Portal

In a Customer's supplier portal, Addresses and Contacts may be managed differently than in your global network profile.

- You may make an address, contact or location inactive or active. By default, all new addresses, contacts and locations that you add are active. To see inactive values, select the **Show Inactive Addresses (Contacts, Locations)** button on the page.
- Inactive locations are not available for associating to addresses/contacts, and are not listed in the address wizard.
- A customer may require a particular type of address or contact in order for your registration to be submitted. For example, you may see a message that a Fulfillment Center Address is required, even though you have a Remittance or Physical Address saved already.
- When you add an address, contact or location in a customer's portal, that value is only visible to that customer.

- You may see addresses, contacts and locations that the customer has added for your organization. You may manage these the same way you manage values that you add. Any changes made may be reviewed by the customer.
- You may see changes to values by selecting the **View History** link on the customer specific profile page.

Adding Sales and Corporate Contacts for Indirect Sourcing Customers

If a user with **Edit All User Profiles/Roles Permissions** or **Edit All User Profiles Only** permission adds a Sales or Corporate contact to an Indirect Sourcing customer's registration, you can select to send a user registration request to those contacts. An organization setting controls whether the option to send a user registration request to these contacts is ON or OFF by default. However, the person adding the contact can still decide to turn the option on or off for the particular contact being added.

- Navigate to **Setup > General Site Settings > System Settings and Configuration > System Configuration** and expand the **Security and Sessions** section. The option to **Send a new user request when creating new Sales or Corporate Contacts** is ON by default.
- When the setting is ON, and the supplier user selects to add a new contact to an Indirect Sourcing customer registration, the option for **Create new user account for this contact?** is selected in the Add Contact overlay. This means the new contact WILL receive a registration email once added to the profile. However, the user can choose to deselect it if they do NOT want the new contact to receive the registration email.
- When the setting is OFF, and the supplier user selects to add a new contact to an Indirect Sourcing customer registration, the option for **Create new user account for this contact?** is not selected in the Add Contact overlay. This means the new contact will NOT receive a registration email once added to the profile. However, the user can choose to select it if they do want the new contact to receive the registration email.

When a new Sales or Corporate contact is added for an Indirect Sourcing customer:

- An option displays at the bottom of the **Add Contact** overlay for **Create new user account for this contact?** It will be selected or deselected by default depending on the organization configuration (explained above). You can override the organization setting for the specific contact by selecting or deselecting the option.
- Invited users will display in **Pending User Registrations** and will be assigned the **Manage Bid Opportunities** role by default, and have access to the Customer Branded Portal from which the request originated.

Manage Addresses in the Customer Branded Portal

Step by Step

The goal of this task is to manage address information in the customer portal, including making an address inactive and showing inactive addresses.

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.
4. Select the **Addresses** menu item in the profile.
5. By default, you will see only Active addresses unless all addresses are inactive. If all addresses are inactive, all addresses display with a link to **Hide Inactive Addresses**.
6. To add a new address, refer to Adding and Editing Addresses. Note that a new address created in the customer portal will only show to this customer, and the customer may require certain fields be completed for the address record (indicated with a star).
7. To **Edit** the Address - click the **Edit** button or the Address label to open the address.
   a. Make necessary changes to any of the address fields. Required fields are indicated with a star.
   b. Click to **Save Changes** to the address.
8. To make an address **inactive**:
   a. From the open address details, deselect the appropriate business activity (address type) below the Address Label and **Save Changes**.
   b. From the address list, select the dropdown arrow on the Edit button, and select **Make Inactive**.
   c. If you are not showing inactive addresses, the address will no longer display.
9. To make an address active:
   a. From the open address details, select the appropriate business activity (address type) below the Address Label and **Save Changes.**
   b. From the address list, select the dropdown arrow on the Edit button, and select **Make Active.**
10. **To see inactive address records**, click the **Show Inactive Addresses** hyperlink.
11. **To hide inactive address records**, click the **Hide Inactive Addresses** hyperlink.
12. View a History of customer-specific profile edits by selecting the **View History** link.

Manage Contacts in the Customer Branded Portal

Step by Step

The goal of this exercise is to manage contact information in the customer portal, including making a contact inactive and showing inactive contacts.

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.
4. Select the **Contacts** menu item in the profile.
5. By default, you will see only Active contacts unless all contacts are inactive. If all contacts are inactive, all contacts display with a link to **Hide Inactive Contacts**.
6. To add a new contact, refer to Adding and Editing Contacts.
7. To **Edit** the Contact - click the **Edit** button or the Contact label to open the contact.
    a. Make necessary changes to any of the contact fields. Required fields are indicated with a star.
    b. Click to **Save Changes** to the contact.
8. To make a contact **inactive**:
    a. From the open contact details, deselect the appropriate business activity (contact type) below the Contact Label and **Save Changes**.
    b. From the contacts list, select the dropdown arrow on the Edit button, and select **Make Inactive**.
    c. If you are not showing inactive contacts, the contact will no longer display.
9. To make a contact active:
    a. From the open contact details, select the appropriate business activity (contact type) below the Contact Label and **Save Changes.**
    b. From the contacts list, select the dropdown arrow on the Edit button, and select **Make Active.**
10. **To see inactive contact records**, click the **Show Inactive Contacts** hyperlink.
11. **To hide inactive contact records**, click the **Hide Inactive Contacts** hyperlink.
12. View a History of customer-specific profile edits by selecting the **View History** link.

Manage Locations in the Customer Branded Portal

Step by Step

The goal of this task is to manage location information in the customer portal, including making a location inactive and showing inactive locations.

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.
4. Select the **Locations** menu item in the profile.
5. By default, you will see all locations. If you want to see only Active locations, click the link to **Hide Inactive Locations**. To show all locations, click the link to **Show Inactive Locations**.
6. To add a new location, refer to Adding and Editing Locations. Note that a new location created in the customer portal will only show to this customer, and the customer may require certain fields be completed for the location record (indicated with a star).
7. To **Edit** the Location - click the **Edit** button or the Location label to open the address.
    a. Make necessary changes to any of the location fields. Required fields are indicated with a star.
    b. Click to **Save Changes** to the address.
8. To make a location **inactive**.
    a. From the address list, select the dropdown arrow on the Edit button, and select **Make Inactive**.
    b. If you are not showing inactive locations, the value will no longer display.
9. To make a location **active**:
    a. From the location list, select the dropdown arrow on the Edit button, and select **Make Active.**
10. **To see inactive location records**, click the **Show Inactive Locations** hyperlink.
11. **To hide inactive location records**, click the **Hide Inactive Locations** hyperlink.
12. View a History of customer-specific profile edits by selecting the **View History** link.

eSignature Documents in Customer Registrations

During supplier registration process, customers may want suppliers to submit a self-certification form to meet various criteria (i.e. insurance, diversity, etc.). These signed forms help customers make onboarding and sourcing decisions.

Customers have the ability to use **DocuSign** to include document templates for electronic signature in supplier registrations. When added to a supplier registration, suppliers 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.

The **Tax Information** page in the **Supplier Profile** includes a column for **Signature Status.** This column indicates if the document has been signed via e-Signature, DocuSign, or not signed.

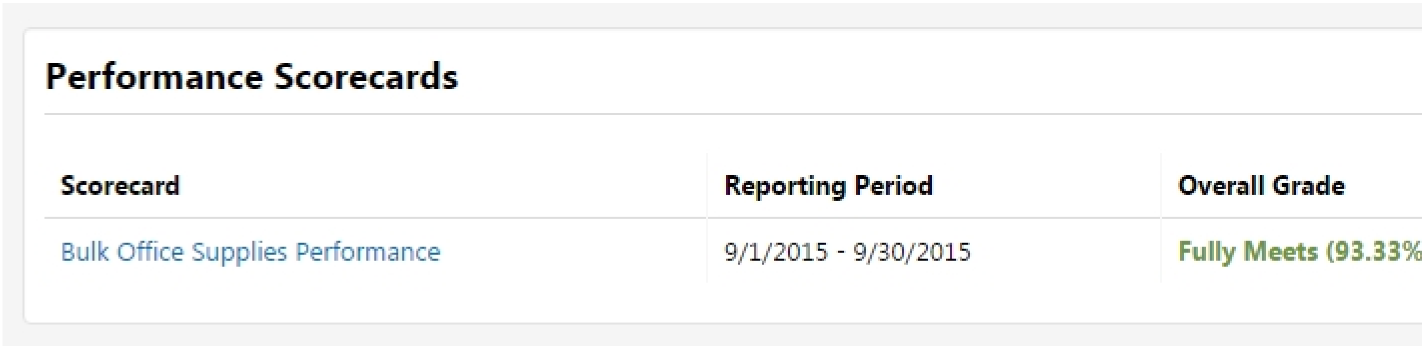
HOW IT WORKS

- In the supplier registration, the supplier user will see the field displayed under **Additional Questions** for the registration section.
  - Initially, **No Signed Document** is indicated, with a button to **Sign Document**.
  - When the user clicks to **Sign Document**, the connection to **DocuSign** is made. The user must agree to use electronic records and signatures to proceed. Other actions are available to decline to sign the document, or to finish the process later.
  - Once you have agreed to DocuSign's terms, the document displays.
  - You may notice that some fields have information already populated. The customer can choose to pre-populate fields such as your company name, DUNS number, etc., with information that is already present in your supplier profile. You can change this information unless the customers has configured the field as read-only.
  - The user can complete the remaining information, and click to **Sign** the document. An overlay for **Adopt Your Signature** displays.
  - The supplier user selects options for signing the document, and clicks to **Adopt and Sign**.
  - The document now displays in **DocuSign** with the supplier user's signature. The supplier will click **Finish** to return to the customer's branded portal.
- Once signed, the user sees **Signed Document** displayed under the custom field. **Actions** available include **Download**, **Sign New Document**, and **Delete**.
- If the signing process has not been completed, a **Complete Signing** dropdown displays with actions to complete the signing or to discard the actions down so far.
- Users will see an icon displaying a status message if there are communication issues with **DocuSign**, or a status of waiting to get the document from **DocuSign**. If the customer removes the document from the configuration, an error will display as well.
- Once you have signed the document, the customer can view the signed document when reviewing the registration.

Supplier Performance Scorecards from Customers

Some customers may utilize a **Supplier Performance** feature, which allows for the collection, measurement, analysis and reporting of supplier-related KPIs (Key Performance Indicators) configured by the organization. Customers can create scorecards with various indicators, and ask internal evaluators to score your company on those indicators. The customer can choose to share scorecard information with a supplier.

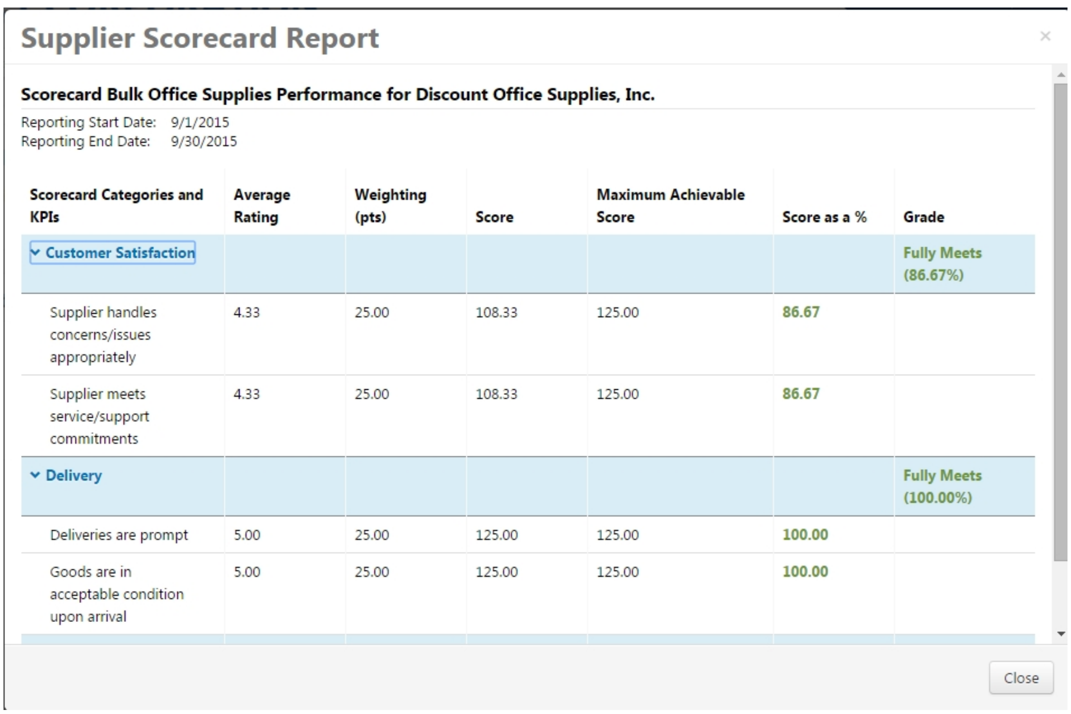
When a customer chooses to share scorecard information with you, a **Performance Scorecards** widget will display on the home page of the Customer Branded Portal. All scorecards being shared by the customer will display, along with the reporting period for the scorecard, and your company's overall grade.



Performance Scorecards

Scorecard	Reporting Period	Overall Grade
Bulk Office Supplies Performance	9/1/2015 - 9/30/2015	Fully Meets (93.33%

Select the scorecard name to open an overlay with details. The scorecard is organization by category (defined by the customer), and KPIs within each category. You will see your score and overall grade for each KPI.



Supplier Scorecard Report

Scorecard Bulk Office Supplies Performance for Discount Office Supplies, Inc.

Reporting Start Date: 9/1/2015
Reporting End Date: 9/30/2015

Scorecard Categories and KPIs	Average Rating	Weighting (pts)	Score	Maximum Achievable Score	Score as a %	Grade
Customer Satisfaction						Fully Meets (86.67%)
Supplier handles concerns/issues appropriately	4.33	25.00	108.33	125.00	86.67	
Supplier meets service/support commitments	4.33	25.00	108.33	125.00	86.67	
Delivery						Fully Meets (100.00%)
Deliveries are prompt	5.00	25.00	125.00	125.00	100.00	
Goods are in acceptable condition upon arrival	5.00	25.00	125.00	125.00	100.00	

Close

MANAGING HOSTED CATALOG DATA

HOSTED CATALOG MANAGEMENT

The JAGGAER ONE Supplier Network Portal is used by suppliers to manage hosted catalog data – product information and prices for JAGGAER Customers. The **Catalogs and Contracts** **> Hosted Catalog Items and Price** section is the main area for managing your hosted catalog data. This menu option is available if your portal has the **Item Master** license enabled. Details on submitting and maintaining your content and pricing are contained in the **Supplier Catalog Management Handbook** found in the JAGGAER ONE Supplier Network. Some of the hosted catalog management features include:

Submitting Content and Pricing

Within the JAGGAER ONE Supplier Network Portal, the supplier may upload files with content, list pricing, and customer specific pricing. A submission process validates the file for errors, and the user can see the status of the file submission throughout the process. A user can search across submissions, as well as access a Dashboard with pending and recently completed submissions.

Content and Pricing Extracts

Request an extract of your catalog content and pricing as it exists in the database and pricing as approved by customers.

Items and Price Sets Search/Management

You are able to view your items in a search interface that is similar to the customer user interface. Click on any product description to see additional product details. You are able to update the content information and add pricing item by item. You are also able to create items on an item by item basis. A Price Sets area shows the status of submitted customer pricing versions as well as list price.

Configuration

You may set your desired amount of days after import that discontinued items are marked for deletion. You are also able to set a default for how you would like to categorize your content submissions.

You may utilize **Attribute Search** tab to search for attributes to describe your products.

CUSTOMER ORDER DELIVERY

RECEIVING CUSTOMER ORDERS

Suppliers may choose to receive orders from JAGGAER customers in a number of different ways. Methods may be used for certain types of orders, and details are determined as part of your implementation with the customer. Following is an overview of the delivery options available:

- **cXML** orders are the preferred method of purchase order delivery. JAGGAER conforms to the cXML 1.2 purchase order standard. JAGGAER can integrate with most suppliers using this form of cXML. If you are using another version of the standard, JAGGAER can work with you to further investigate the possibility of integration. For more information on the cXML standard, please visit: http://www.cxml.org. For more information on cXML delivery with JAGGAER, please see the **Supplier Integration Specification** document.
- **E-mail** purchase orders can be sent to the supplier if cXML purchase orders are not accepted. JAGGAER has the ability to send e-mails in any of the following three formats: plain text, HTML embedded, or HTML attachment. Please note that orders containing credit card payments will NOT be sent via email.
- **Fax** purchase orders have a format identical to the HTML version of the e-mail purchase order. Fax is the default purchase order delivery method unless cXML or e-mail is preferred and specified by the supplier.
- **Supplier Portal** purchase orders are provided to your supplier portal for processing. You may set up users at your organization with the sole responsibility of processing sales orders that are received through your portal.

JAGGAER does not support delivery of purchase orders via EDI.

E-MAIL PURCHASE ORDER

JAGGAER has the ability to deliver purchase orders via e-mail as either plain text, embedded html, or attached html.

Navigate to see a sample format:

Sample Plain Text Email Purchase Order

Sample HTML Email Purchase Order (Embedded or Attached)

FAX PURCHASE ORDER

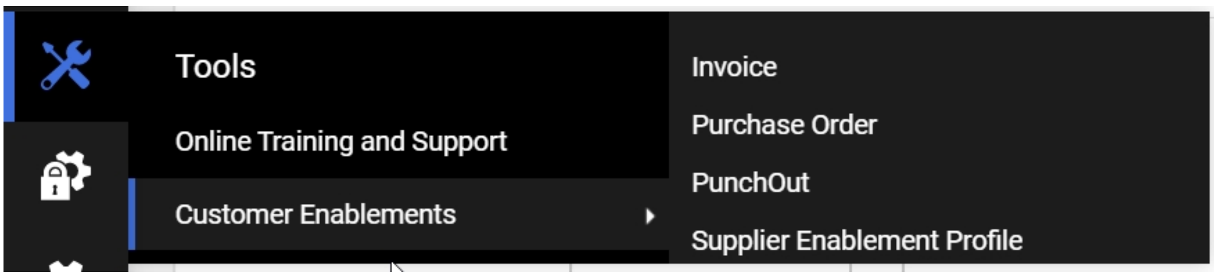
The format of a fax purchase order is identical to the html e-mail format.

Fax orders can either be sent to a single location for all customers (e.g. customer service center) or, the faxes can be sent to different numbers based on the ordering organization (e.g. account representative). However, for each ordering organization, only one fax number can be provided per vendor (e.g. orders cannot be sent to customer service with a CC to the account representative).

CUSTOMER ENABLEMENTS AND INTEGRATIONS

CUSTOMER ENABLEMENTS

In the JAGGAER ONE Supplier Network, you may access the enablements you have in place with JAGGAER customers. These include PunchOut, purchase order, and invoice integrations. You may enter settings directly into the Network. You may also enter important enablement details that many customers need to know as part of the supplier implementation process.



Navigate to the different enablement settings by selecting **Tools** > **Customer Enablements**, and selecting the appropriate integration. Within each of the enablement settings, you may set specific settings per customer, as well as default settings that may be used by any customer without a specific setting.

As you navigate to each type of enablement, you will see links to customers with whom you have that type of enablement. For example, you may see different customers in the PunchOut enablement settings than you see in the Invoice enablement settings because your customers with those integrations differ.

Note: You must have appropriate permissions to view or edit the customer enablement settings:

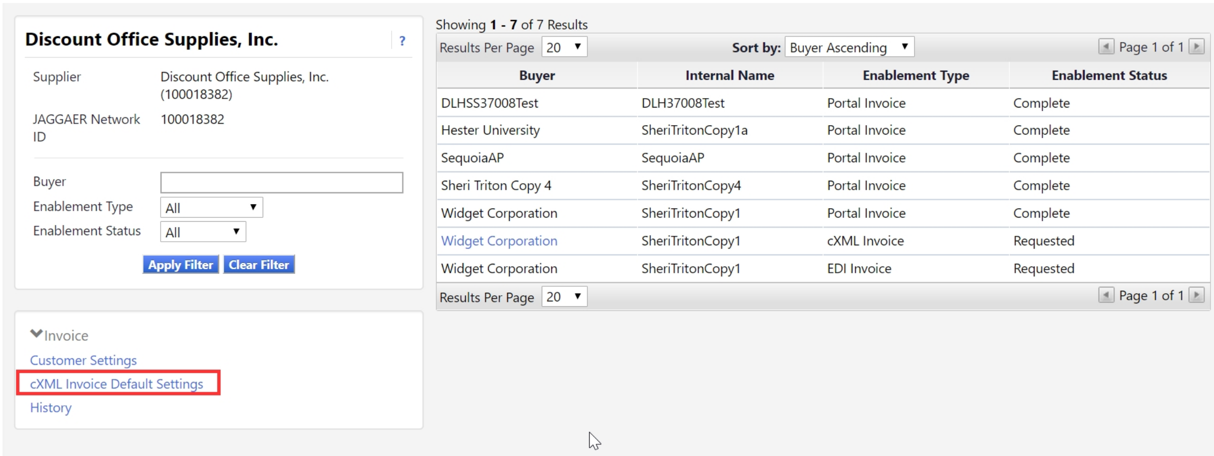
- **Manage Customer Enablements** - allows the user to edit and save default and customer cXML settings, as well as the Supplier Enablement Profile answers.
- **View Customer Enablements** - allows the user to view the default and customer cXML settings, as well as the Supplier Enablement Profile answers. The user cannot, however, make edits to those settings.

Customer vs. Default Settings

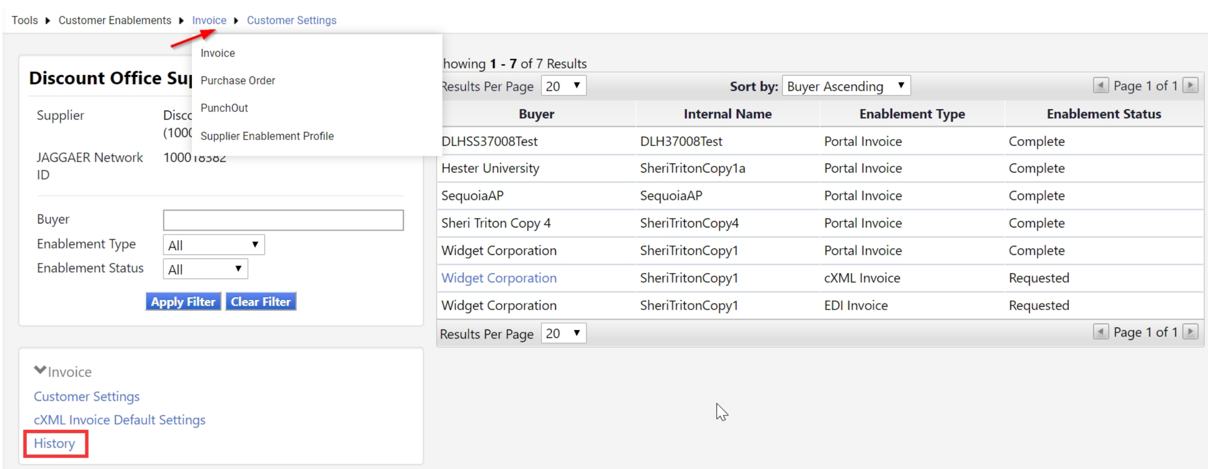
When you navigate to a type of enablement setting from the Customer Enablements menu, you will default to the customer list/settings for that enablement. For integration enablements, you may select the customer name to view the specific settings for that customer.

You will see if the customer is inheriting the default settings. If so, and you need to set specific criteria for the customer, you may select the edit button to make changes.

If no customers are configured for that type of enablement, you may navigate to set the **Default settings** for that type of enablement.

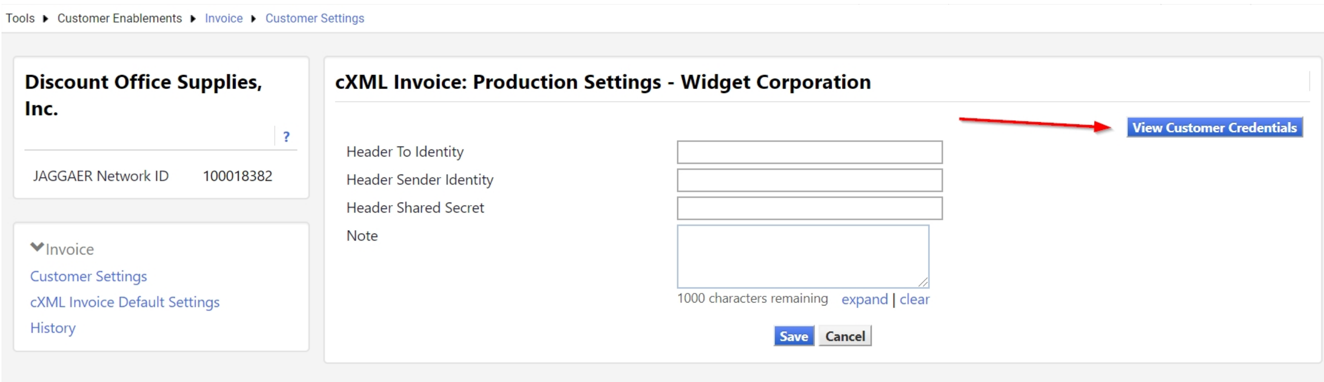


From each page, you may navigate to another type of enablement, or to the Customer settings. You may also select **History** to view an audit log of changes for that enablement.



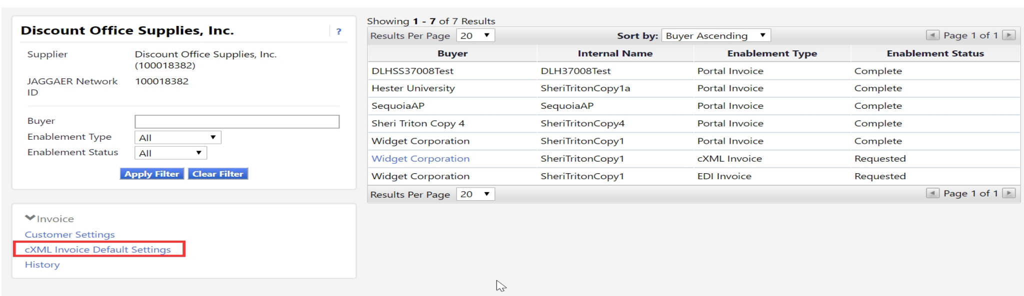
You can select customers for which the enablement has not yet been completed to see details.

The customer inherits any default settings, but you may select **Edit** to change any of the configuration settings for the specific customer. Once you select **Edit**, you may also select a **View Customer Credentials** button to view and apply a customer's specific credential settings for the integration.



Invoice Enablement Settings

When you select **Invoices** from the **Customer Enablements** menu, you are navigated to the **Customer Settings** page by default. If you do not have any customers enabled for invoice integration, a message will display that no settings apply. In this case, you may continue to manage your default settings by selecting **cXML Invoice Default Settings** .



OPTIONS AVAILABLE WHEN VIEWING AVAILABLE INVOICE ENABLEMENTS CUSTOMER SETTINGS

- **List of customers** - a list of customers display that indicates the customer name, the customer's internal name, and the Enablement type and status. Please note that some integration enablements do not have configuration settings, such as Portal Invoicing. Therefore, the customer name will not be a hyperlink.
- **Additional filter options** - on the left are options to filter the customer list by the Buyer Name, enablement type, or enablement status. Select from the dropdown options and click to **Apply Filter**.
  - Buyer - enter all or part of the buyer name. Options will show depending on the criteria entered, and you may select a buyer from the list.
  - Enablement Type - Select cXML Invoice, Portal Invoice, or EDI Invoice.
  - Enablement Status - Select from Requested, In Process or Complete.
- **Links to Customer Settings, Default Settings, and History** - these links are available on each page of the customer integrations settings, for easy navigation.

TESTING INVOICE INTEGRATION SETTINGS

Once you have entered credentials for a customer's invoice import configuration, you have the option to test the import for that customer. In the customer's specific settings, select the **Test Import Invoice** button.

Selecting the button will open a popup window for the Production or User Test (UIT) URL you requested to test. Here, you may enter the xml file contents and select the **Submit** button to see the response headers and content.

View / Configure Invoice Enablement Settings

Step by Step

The purpose of this task is to configure Invoice enablement settings in the Supplier Network. You may configure default settings that will inherit to appropriate customers, or enter specific criteria for a customer.

1. Navigate to **Tools > Customer Enablements > Invoice.**
2. To edit default settings, select the link for **cXML Invoice Default Settings.**
    a. Select the **Edit** button to make all fields editable.
    b. Enter the appropriate Header To Identity, Header Sender Identity, and Header Shared Secret. You may enter a Note if desired.
    c. Select to **Save** your edits.
3. To edit customer settings, select a customer from the **Customer Settings** page.
    a. You will see any current settings populated.
    b. Select the **Edit** button to make all fields editable.
    c. Select the **View Customer Credentials** to view the customer's cxml invoice import credential settings. Select to **Apply** the settings to the customer settings within the Supplier Network portal, if desired.
    d. You may edit the settings for **Header To Identity**, **Header Sender Identity**, **Header Shared Secret**, if different from the customer credentials applied or there were no customer credentials applied. You may also enter an optional **Note**.
    e. Select to **Save** your edits.
4. View a history of changes by selecting the **History** hyperlink.

Test Invoice Import Settings

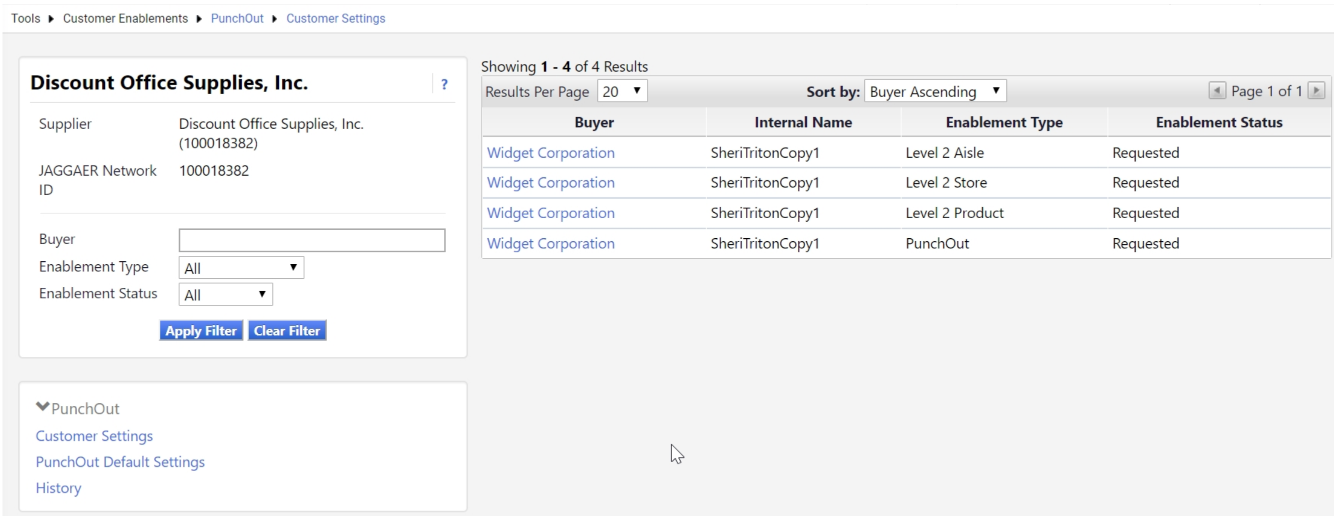
Step by Step

The purpose of this task is to test cxml invoice import credentials in the Supplier Network.

1. Navigate to **Tools > Customer Enablements > Invoice.**
2. Select a customer from the **Customer Settings** page.
3. If settings are not already configured, select the **Edit** button and configure the appropriate credentials. Select to **Save** the credentials.
4. Select the **Test Import Invoice** button.
    a. A popup window displays with the appropriate Post URL address.
    b. Enter the xml file contents in the **Request Information: Content Text** box.
    c. Click the **Submit** button.
    d. Once the request has finished processing, you will see the **HTTP Response Time**, **HTTP Response Status Code**, **Response Headers** and **Response Content** displayed on the right side of the popup window.
    e. If you would like to test a different message, you may select the **clear** hyperlink to clear the values in any of the fields.
5. When you have received an acceptable response via the test window, advise JAGGAER when you are ready for the invoice configuration settings to be applied to a customer's integration.

PunchOut Settings

When you select **PunchOut** from the **Customer Enablements** menu, you are navigated to the **Customer Settings** page by default. If you do not have any customers enabled for punch-out integration, a message will display that no settings apply. In this case, you may continue to manage your default settings by selecting **PunchOut Default Settings**

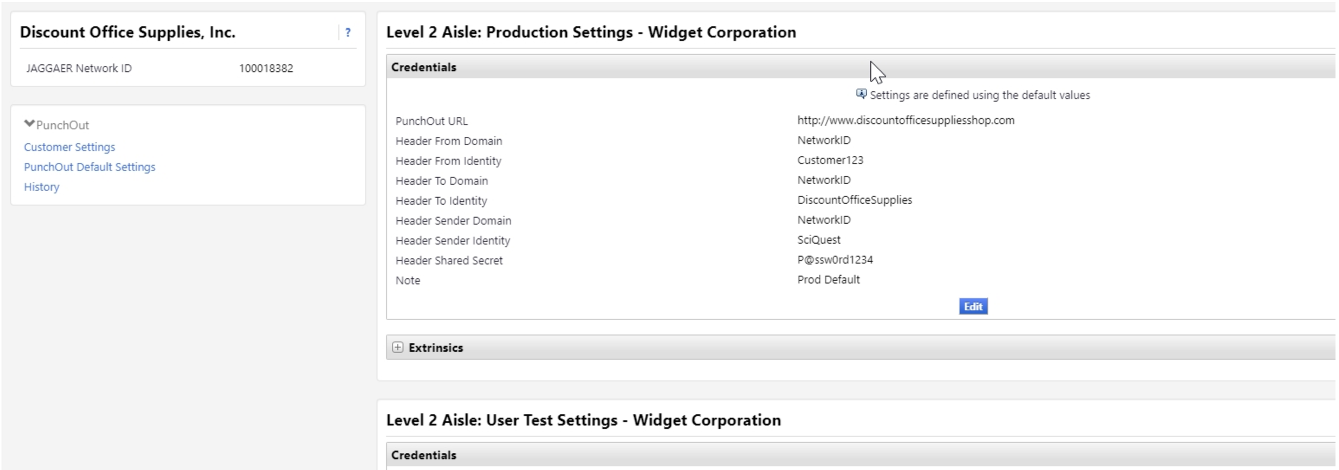


OPTIONS AVAILABLE WHEN VIEWING AVAILABLE PUNCHOUT ENABLEMENTS CUSTOMER SETTINGS

- **List of customers** - a list of customers display that indicates the customer name, the customer's internal name, and the Enablement type and status. You may select the customer name hyperlink to see the details for the customer's enablement.
- **Additional filter options** - on the left are options to filter the customer list by the Buyer Name, enablement type, or enablement status. Select from the dropdown options and click to **Apply Filter**.
  - Buyer Name - enter all or part of the buyer name. Options will show depending on the criteria entered, and you may select a buyer from the list.
  - Enablement Type - Select PunchOut, Level 2 Store, Level 2 Product, or Level 2 Aisle.
  - Enablement Status - Select from Requested, In Process or Complete.
- **Links to Customer Settings, Default Settings and History** - these links are available on each page of the customer integrations settings, for easy navigation.

AVAILABLE SETTINGS

In the punch-out settings for default and customers, you may set appropriate credentials, as well as Extrinsic data.



TESTING PUNCH-OUT SETTINGS

Once you have entered credentials for a customer's punchout configuration, you have the option to test the configuration for that customer. In the customer's specific settings, select the **Test Settings** button to test the punch-out configuration. This will navigate you to the punch-out site as configured so you can test adding an item to the cart and bringing it back into the system. When back in the portal, you may select the **View cXML** button to view the message associated with the punch-out test.

View / Configure PunchOut Settings

Step by Step

The purpose of this exercise is to configure PunchOut settings in the Supplier Network. You may configure default settings that will inherit to appropriate customers, or enter specific criteria for a customer.

1. Navigate to **Tools > Customer Enablements > PunchOut.**
2. To edit default settings, select the link for **PunchOut Default Settings**.
    a. Select the **Edit** button to make all fields editable.
    b. Enter the appropriate credentials. You may also enter an optional **Note** value.
    c. Expand the **Extrinsics** section to and select the **Edit** button to enter values for any appropriate Extrinsic fields.
    d. Select to **Save** your edits.

3. To edit customer settings, select a customer from the **Customer Settings** page.
    a. You will see any current settings populated.
    b. Select the **Edit** button to make all fields editable.
    c. Select the **View Customer Credentials** to view the customer's punch-out integration credentials, if available. Select to **Apply** the settings to the customer settings within the Supplier Network portal, if desired.
    d. Enter the appropriate credentials. You may also enter an optional **Note** value.
    e. Expand the **Extrinsics** section to and select the **Edit** button to enter values for any appropriate Extrinsic fields.
    f. Select to **Save** your edits.
4. View a history of changes by selecting the **History** hyperlink.

Test PunchOut Settings

Step by Step

The purpose of this task is to test PunchOut settings in the Supplier Network.

1. Navigate to **Tools > Customer Enablements > PunchOut.**
2. Select a customer from the **Customer Settings** page.
3. If settings are not already configured, select the **Edit** button and configure the appropriate credentials. Select to **Save** the credentials.
4. Expand the **Extrinsics** area and populate appropriate information for the customer's integration.
5. Select the **Test Settings** button.
    a. If you receive an error message, select button to **Cancel PunchOut** to return to the page. Check your configurations, **Save** any changes and attempt to test again. If you still have errors, contact JAGGAER for assistance.
    b. As you are connected to the punch-out site, navigate through the site as you would expect a shopper to navigate and add a product to the cart.
    c. Once you have finished the shopping process in the punch-out, select the appropriate option to return.
6. Select the **View cXML** button to see the test message associated with the punch-out integration.
    a. If changes are required, make edits, save changes, and attempt to test/view the message again.
    b. If no changes are required, close the message window.

7. Advise JAGGAER when you are ready for the punch-out configuration settings to be applied to a customer's integration.

Purchase Order Enablement Settings

When you select **Purchase Order** from the **Customer Enablements** menu, you are navigated to the **Customer Settings** page by default. If you do not have any customers enabled for purchase order integration, a message will display that no settings apply. In this case, you may continue to manage your default settings by selecting **Purchase Order Default Settings**.

OPTIONS AVAILABLE WHEN VIEWING AVAILABLE PURCHASE ORDER ENABLEMENTS CUSTOMER SETTINGS

- **List of customers** - a list of customers display that indicates the customer name, the customer's internal name, and the Enablement type and status. You may select the customer name hyperlink to see the details for the customer's enablement
- **Additional filter options** - on the left are options to filter the customer list by the Buyer Name, enablement type, or enablement status. Select from the dropdown options and click to **Apply Filter**.
  - Buyer Name - enter all or part of the buyer name. Options will show depending on the criteria entered, and you may select a buyer from the list.
  - Enablement Type - Select cXML PO, or EDI Purchase Order.
  - Enablement Status - Select from Requested, In Process or Complete.
- **Links to Customer Settings, Default Settings, and History** - these links are available on each page of the customer integrations settings, for easy navigation.

View/Configure Purchase Order Enablement Settings

Step by Step

The purpose of this exercise is to configure PO enablement settings in the Supplier Network. You may configure default settings that will inherit to appropriate customers, or enter specific criteria for a customer.

1. Navigate to **Tools > Customer Enablements > Purchase Order.**
2. To edit default settings, select the link for **cXML PO Default Settings.**
   a. Select the **Edit** button to make all fields editable.
   b. Enter the appropriate credentials. You may also enter an optional Note value.
   c. Select to **Save** your edits.

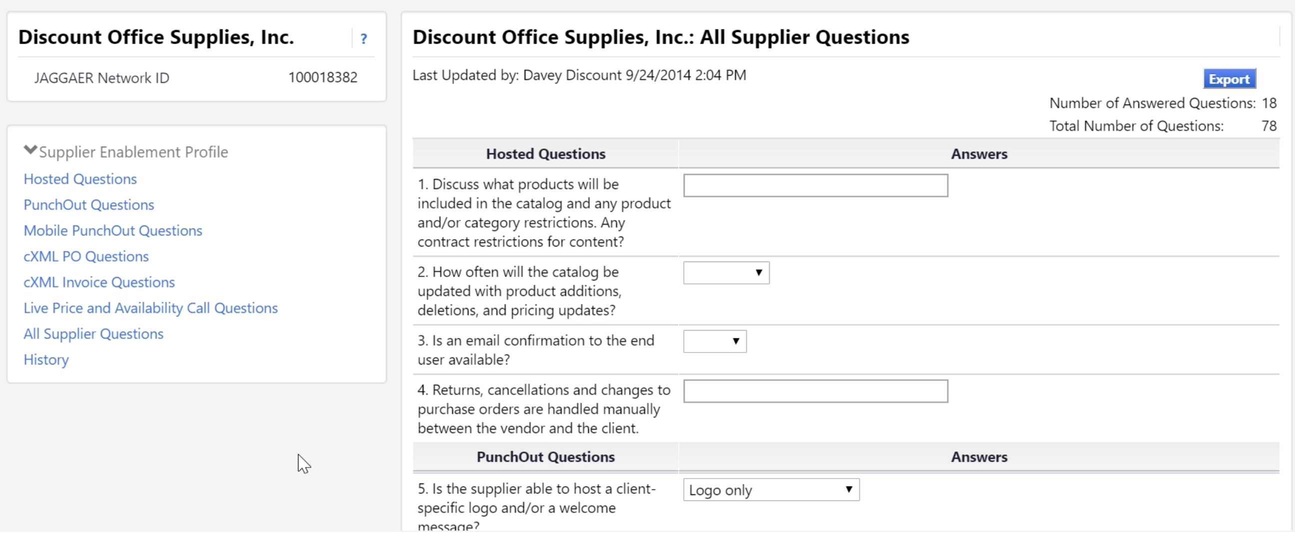
3. To edit customer settings, select a customer from the **Customer Settings** page.
   a. You will see any current settings populated.
   b. Select the **Edit** button to make all fields editable.
   c. Select the **View Customer Credentials** to view the customer's purchase order integration credentials, if available. Select to **Apply** the settings to the customer settings within the Supplier Network portal, if desired.
   d. Edit any credential fields as appropriate. You may also enter an optional **Note** value.
   e. Select to **Save** your edits.

Supplier Enablement Profile

As part of a customer's implementation, JAGGAER will schedule a time to talk with you about your enablement for the customer. Instead of providing the same information repeatedly for different customer implementations, a supplier can utilize the **Supplier Enablement Profile** to complete functional specification information required for customer enablements.

The **Supplier Enablement Profile** allows suppliers to provide default information for Hosted, PunchOut, Mobile PunchOut, Purchase Order, Invoice, and Live Price/Availability call capabilities by answering a questionnaire directly in the Supplier Network.

JAGGAER can access this information as part of a customer's requested enablement.



Suppliers can navigate to the different types of questions or select to see **All Supplier Questions** at once, and see progress of how many questions have been answered. Suppliers may also **Export** the Supplier Enablement Profile information in a .csv file format.

Step by Step

The purpose of this task is to access and edit the Supplier Enablement Profile.

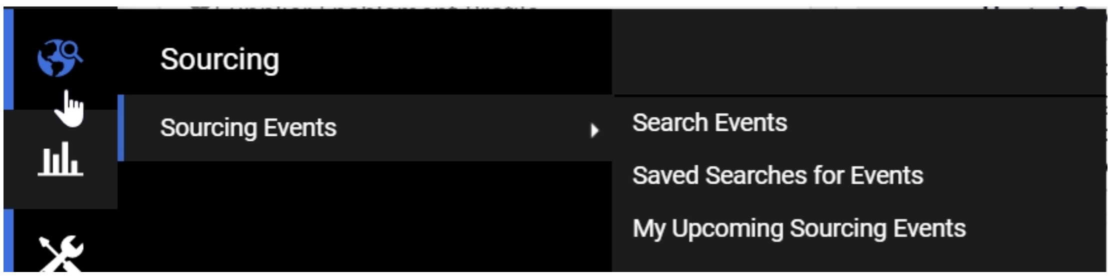
1. Navigate to **Tools > Customer Enablements > Supplier Enablement Profile**.
2. Select from the question types: **Hosted Questions**, **PunchOut Questions**, **Mobile PunchOut Questions, cXML PO Questions**, **cXML Invoice Questions**, **Live Price and Availability Call Questions** or **All Supplier Questions**. You need only complete the questions that apply to your organization.
3. In the specific question view, complete the information:
    a. Dropdown options - select one of the available answers for these questions.
    b. Checkbox options - you may select multiple answers for these questions - select all that apply.
    c. Text box options - for questions with a free-form text box, enter the appropriate answer.
4. Click **Save** as you edit the answers.
5. As you complete each list of questions, note the **Number of Answered Questions** compared to the **Total Number of Questions** to assess completeness.
6. Click the **Export** button to download a file with the answers you've provided.

SOURCING EVENTS

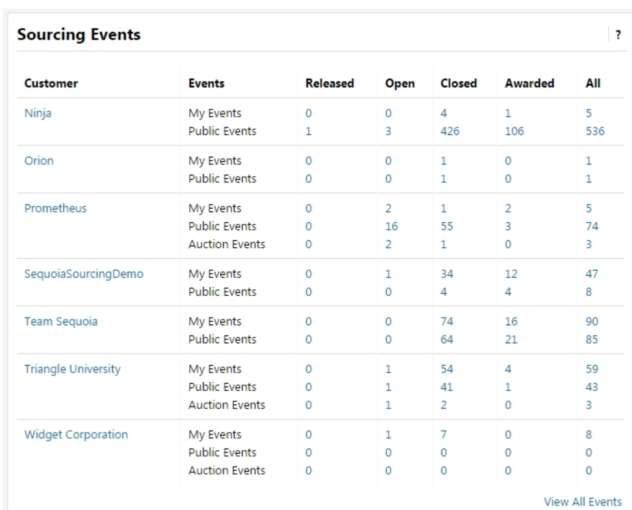
SOURCING EVENTS

Some customers utilize JAGGAER's Indirect Sourcing solution, an on-demand bid management solution that helps them active significant process efficiencies and cost savings over traditional bid processes.

Sourcing Events are accessed via the **Sourcing** menu in the Supplier Network. Search to see a list of events that you have access to.



Sourcing Events may also be accessed directly from the home page widget.

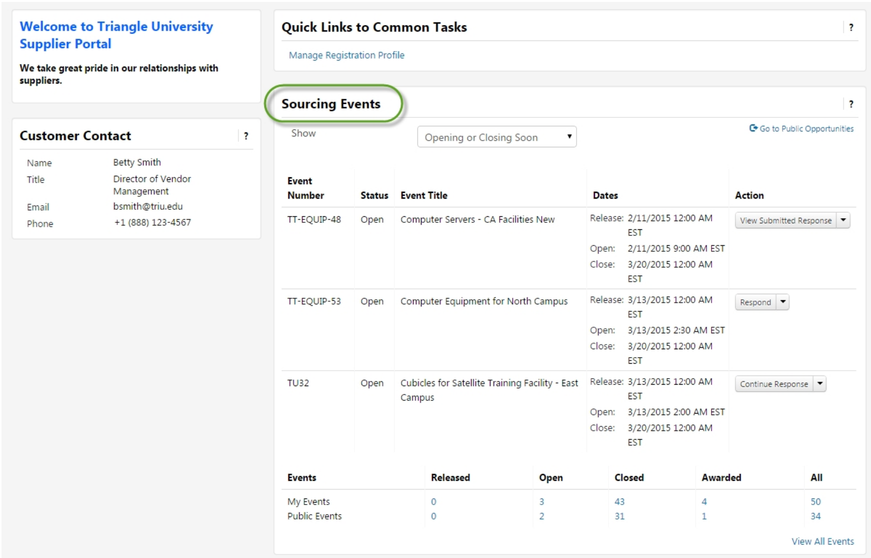


Sourcing Events

Customer	Events	Released	Open	Closed	Awarded	All
Ninja	My Events	0	0	4	1	5
	Public Events	1	3	426	106	536
Orion	My Events	0	0	1	0	1
	Public Events	0	0	1	0	1
Prometheus	My Events	0	2	1	2	5
	Public Events	0	16	55	3	74
	Auction Events	0	2	1	0	3
SequoiaSourcingDemo	My Events	0	1	34	12	47
	Public Events	0	0	4	4	8
Team Sequoia	My Events	0	0	74	16	90
	Public Events	0	0	64	21	85
Triangle University	My Events	0	1	54	4	59
	Public Events	0	1	41	1	43
	Auction Events	0	1	2	0	3
Widget Corporation	My Events	0	1	7	0	8
	Public Events	0	0	0	0	0
	Auction Events	0	0	0	0	0

View All Events

Or, if you are in the customer's portal, you can navigate to an event in the Sourcing Events widget.



Once you have accessed an event, you will follow the customer's directions in responding to the event.

Notifications for Awarded Events

Customers may configure and send emails to suppliers after a Sourcing Event has been awarded. Customers can choose to send emails to suppliers regarding the awarded event. The customer may choose to send an email to:

- Suppliers who were awarded all or a portion of the event.
- Suppliers who participated in the event, and submitted a response.
- Suppliers who were invited to but did not respond to the event.
- Suppliers who were included or not included on a subsequent event stage, in the case of multi-stage events.

The email is sent to recipients identified by the customer. The supplier user does not need to have any Notification Preferences enabled to receive the email. The email notifications are configured for each event, so a supplier may not receive an email for every event they were invited or responded to.

What are Sourcing Events?

When beginning a major purchase or project, buyers require a significant amount of information from potential suppliers. For many, this is a manual process involving a large amount of paperwork and the mailing or faxing of forms and background information. Automated responses simplify the process, enabling easier distribution of response opportunities and details, along with rapid follow-up communication when needed. Sourcing is the process of automating those responses.

Customers with the Indirect Sourcing solution are able to design projects and events, and invite suppliers to those events. Depending on the type of event, you may be required to submit different information. Once an event closes, the customer evaluates all responses and selects a supplier for the award.

While customers can design their own types of events, following are the most common you will likely receive:

Request for Information (RFI)

An RFI is used to gather initial information such as product brochures, specification sheets, or other details that may help the customer weigh options and develop a more detailed sourcing activity. For example, a buyer working to purchase vehicles for an organization's fleet might request that several automobile dealerships provide general information on various models of cars they sell. Collecting this initial information might help the buyer outline detailed specifications for a formal bidding process. An RFI may not include a request for pricing on specific items, and the information collected generally is not used as the basis for a final purchasing decision.

Request for Proposal (RFP)

An RFP outlines a problem or need that the customer must address, and asks bidders to provide formal proposals on how they can meet the need. While an RFP may request pricing on specific items, some elements of the proposal may be left to the discretion of the potential suppliers. In addition to the proposal, an RFP typically requests or requires suppliers to upload detailed information about their history, capabilities and references.

Request for Quotation (RFQ)

An RFQ is intended to gather final pricing proposals, usually based on detailed specifications that are outlined in the event details. The end goal of an RFQ is to compare quotes and award a bid. Ideally, the information in the results of the RFQ should have enough detail to transfer directly into a contract if needed. An example of an RFQ would be to ask a select group of car dealerships for final pricing based on buying 50 blue mid-sized sedans with GPS navigation, cloth seating, V6 engines, front wheel drive, and automatic transmissions.

Auction

An Auction event can have any of the same components as other event types. The item bid, however, will be entered via an Auction Console during the Auction phase of the event. Suppliers must submit all other required information prior to the beginning of the Auction phase in order to participate in the auction process.

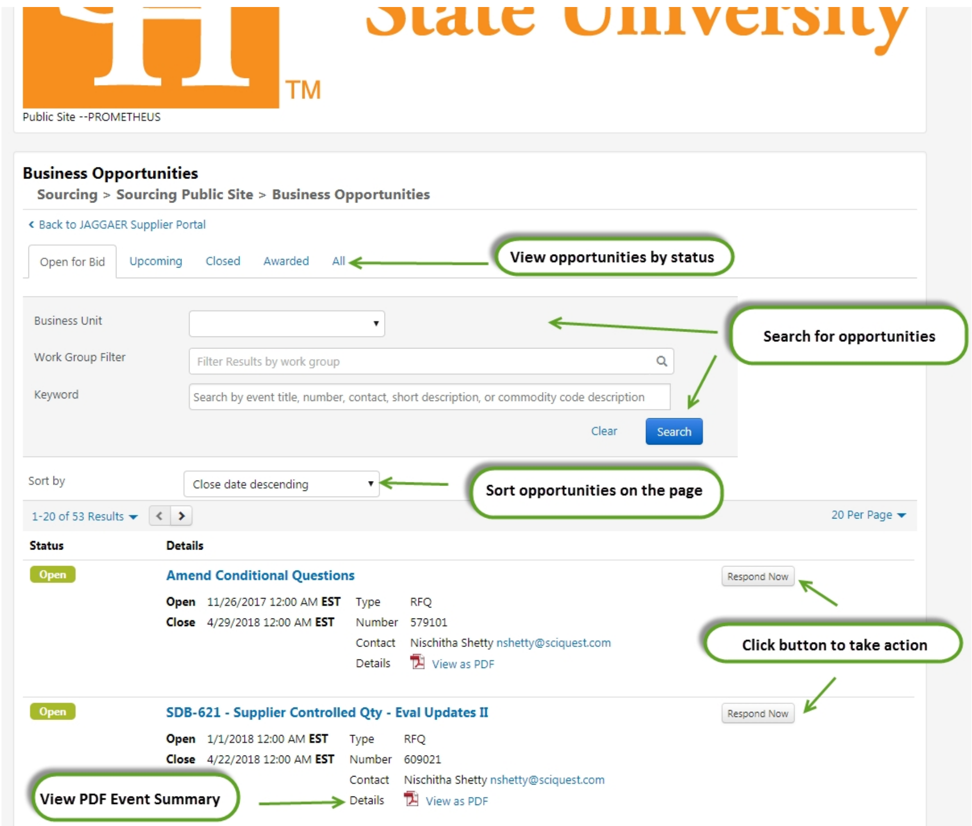
View Public vs. Private Sourcing Events?

You may respond to a customer's sourcing events in two ways: 1) the customer has invited you to respond and you can click in an email to navigate to the event, or go to the event within your existing portal for that customer to see event details and respond; or 2) Access the event via the customer's public website, and respond accordingly.

Not all customers will configure a public website. Those that do will provide you with the URL where you can view the event and register as a supplier if needed.

Public Events

A public event is one that is available for any supplier to access. A customer must have configured a "public" site for suppliers to access. Once you select to view an event, you will be navigated to the event within the customer portal in your Supplier Network. If a user does not have an account in the JAGGAER ONE Supplier Network, they can select to Create Account on the customer login page and follow the directions for gaining access to a customer portal.



The page displays events organized into five tabs. For the events in each tab, click on the button to navigate to the event in the portal or to complete a registration for the customer prior to viewing the event. You may also click to open or download a PDF file of the event information by selecting the **View as PDF** hyperlink. You may search by keyword, contact, event number, description, or commodity code description on any tab, and sort results by various criteria.

- **Open for Bid** - this is the default page displayed, and shows events that are in an Open status.
- **Upcoming** - displays released events that are not yet open.
- **Closed** - displays events that have been closed or canceled. You may select to see only Closed or only Canceled events.

- **Awarded** - displays events that have been awarded, if you have configured your site to display awarded event information.
- **All** - displays all sourcing events available to the public site, in all statuses. You may deselect/select a specific Status to filter results. If an event has been Withdrawn, the PDF will not be generated on the Public Site.

You can search for events by event title, number, contact, short description or commodity code description. The customer may also allow filtering by Business Unit or Work Group. If so, you can select from those options to filter results further.

If the event is an Auction, the **Auction Start** and **Auction End** dates will display.

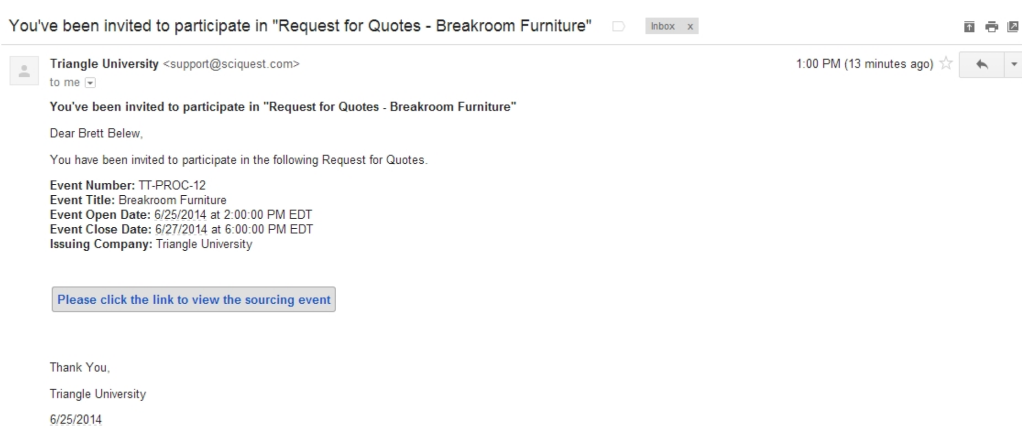
When selecting the action button (Respond Now, View, Preview):

- If you are already logged into your portal, the you will be directed to the requested Sourcing Event in the portal.
- If you have a portal are not logged in, you will be directed to the Portal Login page. Upon login, you will be directed to the requested Sourcing Event.
- If the supplier does not yet have a portal, the user can register on the Portal Login page by selecting Create Account. Upon confirmation of account creation, the user can log in and be directed to the requested Sourcing Event.

Private Events

A private event is one in which your organization is directly invited by the customer to participate. You will receive an email inviting you to view and respond to the event. If the invited user does not yet have a user account for the supplier network portal, the link will take the user through the process of creating an account.

Email to a supplier with a portal, link to event


You've been invited to participate in "Request for Quotes - Breakroom Furniture" Inbox x

Triangle University <support@sciquest.com> 1:00 PM (13 minutes ago)
to me

You've been invited to participate in "Request for Quotes - Breakroom Furniture"

Dear Brett Belew,

You have been invited to participate in the following Request for Quotes.

Event Number: TT-PROC-12
Event Title: Breakroom Furniture
Event Open Date: 6/25/2014 at 2:00:00 PM EDT
Event Close Date: 6/27/2014 at 6:00:00 PM EDT
Issuing Company: Triangle University

Please click the link to view the sourcing event

Thank You,

Triangle University

6/25/2014

You can also view the events for a customer in the Supplier Network and the individual customer portals. Only users with access to see a customer's sourcing events will see the link to events in the portal.

Access to Sourcing Events

Access to sourcing events is determined by two permissions:

- **View and Respond to Sourcing Events**: This permission allows a supplier portal user to view and access sourcing events to which they are invited. The user has access to the Sourcing Events dashboard on the home page, and can search for, view and respond to sourcing events from customers.
- **Manage All Customers**: This permission allows a user to manage the sourcing activities for all customers.

If a user responds to a sourcing invitation via email by selecting the provided link in the email, the user is given the **View and Respond to Sourcing Events** permission upon logging into the portal. A user must be assigned the **Manage All Customers** permissions via a role or at the user level in order to have access to all Sourcing Events from all customers.

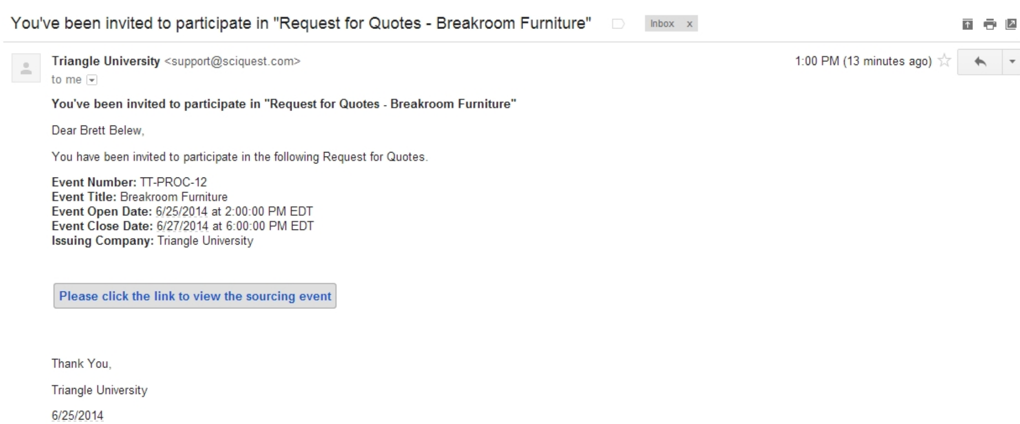
Step by Step

1. Navigate to sourcing events from the **Supplier Network** via:
    a. From the home page, select the hyperlink to **View All Events** in the **Sourcing Events** widget to see all sourcing events from all customers.
    b. From the home page, select the customer name hyperlink from the **Sourcing Events** widget to navigate to the customer's portal and view all sourcing events for that customer.
    c. From the home page, select the number hyperlink for the appropriate event status (i.e. Released, Open, Closed or All) from the **Sourcing Events** widget to navigate to the customer's portal and see all sourcing events in that status.
    d. From any page, navigate to **Sourcing > Sourcing Events > Search Events** and conduct a search for events meeting specific criteria. See Searching for Sourcing Events.
2. Navigate to sourcing events in the **Customer Portal** via:
    a. From the portal home page, select the hyperlink to **View All Events** in the **Sourcing Events** widget to see all sourcing events from that customer.
    b. From the portal home page, select the **Action** button to **Respond** for active events in the **Sourcing Events** widget.
    c. From the portal home page, select the number hyperlink for the appropriate event status (i.e. Released, Open, Closed or All) from the **Sourcing Events** widget to see all sourcing events in that status.
    d. From any page in the customer portal, navigate to **Sourcing > Sourcing Events > Search Events** and conduct a search for events meeting specific criteria. See Searching for Sourcing Events.

3. When viewing the list of sourcing events, note the information provided for the event including customer, event number, status, event title, dates, the supplier, and Action button.
4. Select from the available filters on the left to refine search results.
5. For the appropriate event, click the button under **Action** to **View Event** or **Respond**
   a. **View Event**: allows user to view the event details. The user cannot respond to the event, but can view responses and Questions and Answers for the event.
   b. **Respond**: allows the user to respond to the event.

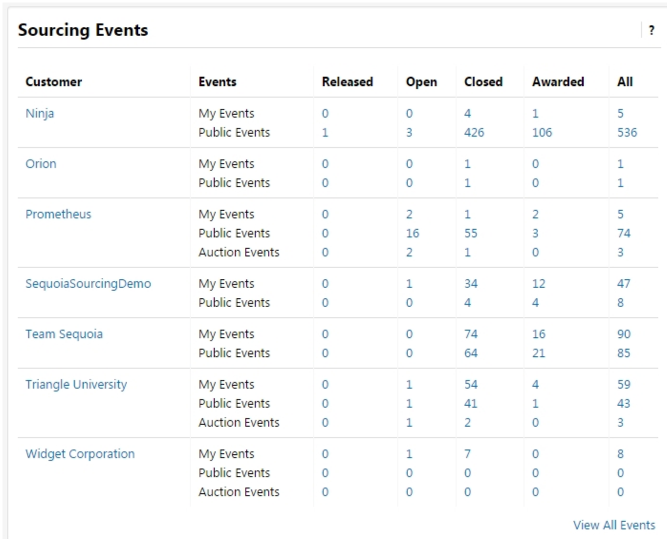
Responding to Sourcing Events

If you receive an email invitation to a sourcing event, you can click on the hyperlink in the email to navigate to the event within the customer portal.

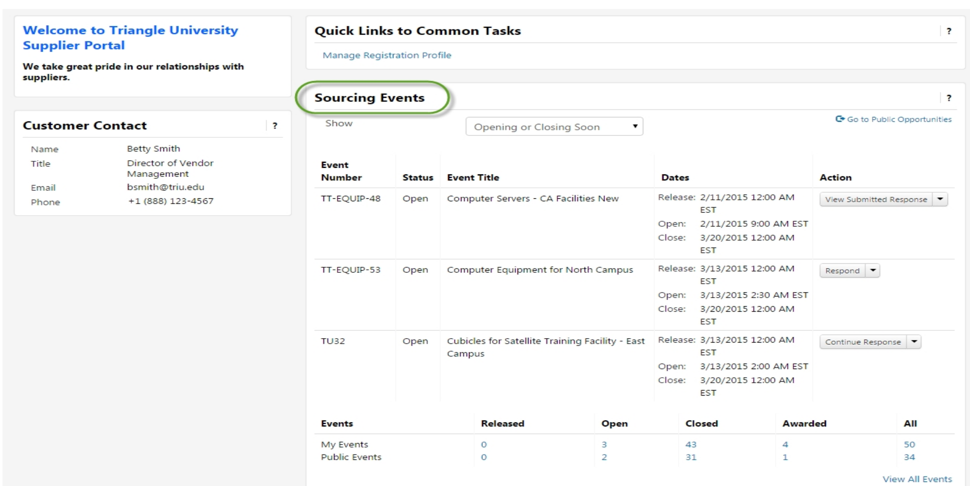


If you are logged into the JAGGAER ONE Supplier Network or customer portal, and have appropriate permissions to see sourcing events from the customer, you will see the Sourcing Events show in the widget on the Supplier Network home page or the Customer Portal home page.

Supplier Network Home page image

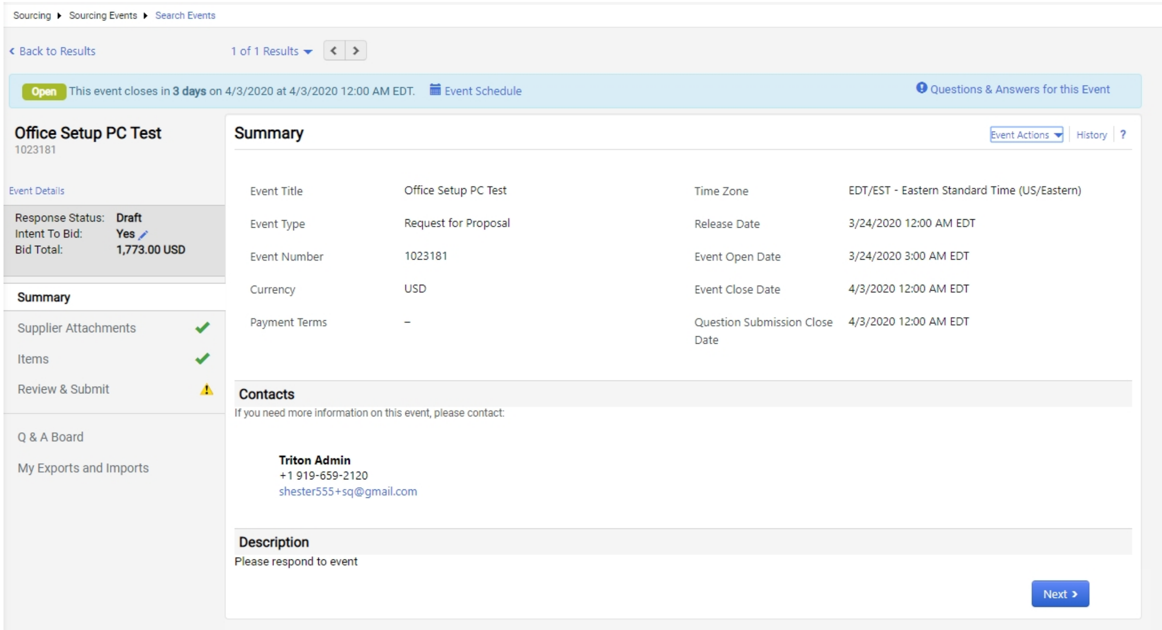


Customer Portal Home page image



Navigating the Event

While the actual details in the event vary depending on the customer and event, some basic features are included in each event view.



- Event status bar - Across the top you'll notice a blue bar with the Event status indication. This status bar is displayed regardless of the event page you are viewing. This lets you know if the event is Open, and what time it will or has closed. You can click to see an event schedule (i.e. if you are on a page where the dates are not shown), and also easily navigate to Questions and Answers for the event. A message will indicate if you are viewing a multi-stage event, and you can select a hyperlink to **View Event Stages**.
- Event information - On the left side of the page, the name and number of the Event displays. This panel is displayed regardless of the event page you are viewing. Click the **Event Details** hyperlink to see basic event information and key dates at any time. Your **Response Status** is displayed, which changes when you begin completing information for the event, as well as **Intent to Bid** and **Bid Total**, if you have updated any of that information. You can click the pencil icon next to Intent to Bid to select a Bid option at any time. If the event has multiple stages, you will see a link to **View Event Stages.**
- Navigation pages for event details - On the left are the pages that are included in the event. These pages may include Prerequisites, Buyer Attachments, Supplier Attachments, Questions, Items and Review & Submit. Click on any of these pages to navigate directly to that page.
- Event Actions - At the top right of the event is a dropdown for Event Actions, where you can select to **Print this Event**. You may also have the option to **Export Event** information to a PDF file if you have accepted required prerequisites.
- Save Progress or Next button - selecting either the Save Progress or Next button saves your current changes. Clicking Next will navigate you to the next page.

Components of the Event

Summary

You will first be navigated to the summary page of the event, which lists basic details about the event, including key dates. The summary page also contains the buyer's contact information and the description of the event. If you have any questions about the event, contact the person listed in the Contacts section. If the buyer has requirements before you can view the event, such as to review prerequisites or declare your bid intent, you cannot navigate past this page until you complete those options.

Prerequisites

A buyer may provide prerequisite information that is important for you to know, view or acknowledge when considering your response to the event. Customers can select to require you to review the Prerequisite page information before allowing you to either 1) see the event details, or 2) respond to the event. If a prerequisite is required, you will see a banner message indicating that you must review the prerequisites page (and possibly provide information) in order to view or respond to the event.

Once the user selects **Proceed to Prerequisites** button or clicks on the **Prerequisites** navigation page on the left, follow the prompts to confirm your acceptance of the prerequisite information.

After you have completed the required actions on the Prerequisites page, the banner message is removed. You will now have access to view the remainder of the event or to begin responding to the event, depending on the requirement criteria. You have the ability to indicate an attachment provided in this section is Confidential, meaning only specific buyer users can open the attachment. Confidential attachments display on the page with an icon ( ).

Note: The buyer may not require you to review Prerequisite information, but may still provide valuable information on that page. It is important to review all the information provided by the customer for the event.

Intent to bid

Once you have reviewed any required prerequisites, you will be prompted to declare your intent to bid. You can do this by clicking the appropriate button in the banner message, or by selecting the edit icon next to the Intent to Bid status in the left panel.

The customer will be able to see that you have declared your intent to bid or not. If you do not intend to bid on the event, select No Bid and there is no further action required. You can change your intent as long as the event is open.

Buyer Attachments

Customers may provide attachments or URLs for your review and consideration when responding to the event. Examples may include:

- an area diagram or photograph if the event is for landscaping services
- an office layout for placement of new carpet or flooring
- detailed specifications for an event
- a URL link to additional company information

To open or save the attachment, or to navigate to the URL address, simply click on the link.

Supplier Attachments

Customers may include a Supplier Attachments section in the event to allow you to provide attachments as files or URL links related to your company, bid response, or the event in general. This section is optional. You can choose to add a confidential attachment that can only be opened by specific users within the buyer organizations.

Click the **Add New Attachment** dropdown and choose **Add New Attachment** or **Add Confidential Attachment** to upload your file or provide a URL link. Confidential attachments display on the page with an icon ( ).

Questions

Customers will likely ask detailed questions for you to answer related to the event. Responses may be in the form of yes/no answers, multiple selections, free-form text, a date, require you to upload a file, and other options. Customers can designate responses to questions as required or optional. Required answers are indicated with a star ( ) and must be answered in order to submit your response for consideration. When responding to a file attachment question, you have the opportunity to flag the attachment as confidential. Confidential attachments display on the page with an icon ( ).

Note that questions may be organized in groups on multiple pages. The questions do not have to be answered in order. You may save progress if you need to come back to the page later to provide additional answers. For more information on responding to questions, see the Question Responses section. Customers can also choose to include a proforma contract for your review on the Questions page. See Proforma Contracts in a Sourcing Event for more information.

Items

If the event includes providing specific products and/or services, the customer may list out the details on the **Items** page. Indications are provided if the Unit Price and/or Estimated Delivery Date is required for an item. The **Requested Delivery** may be shown as a **date** or a **number of days after the award**. You can enter responses directly on the Items page.

If the customer has configured any items to allow alternates, you will see the **Respond to Item** button as a drop-down, and can select to **Add Alternate Item** in addition to or instead of submitting a bid for the original item. If you provide alternates, you will see an indication Σ next to the item that will be used by default in the total bid calculations.

A buyer can list up to 2,000 items on an event. You can navigate to groups and pages of items via the **Go To** selections on the Product Line Items and Service Line Items tabs.

Select the **View Details** hyperlink to see details such as a customer's commodity code for the item, a complete item description, and any attachments associated with the item. You may enter in your price to the customer for the item, estimated delivery information, and optional comments. As you enter prices, you will see your bid total calculated at the bottom. For more information on providing Item information, see the Item Responses section.

Customer may choose to include **Price Component** fields that allow the supplier to provide price-impacting fees and allowances. Suppliers can choose to include values for such fees or allowances that will automatically be calculated in a **Total Item Price** and used in the buyer's evaluation process. If such **Price Component** fields do not apply for an item, the supplier can choose to provide an **All In Price** instead. See **Itemized Price Components in Sourcing Events**, on page 118 for additional information.

If configured by the customer, you will see **Additional Item Fields** section(s) on the page. Here, the customer may provide you with additional information for the item that may be helpful in evaluating your response. Or, the customer may ask you to complete additional information to supplement the item response. You can respond to Additional Item Fields section directly on the page.

- The **Additional Item Fields** section is displayed under the associated product information, and is expanded by default.
- You can choose to **Expand All Additional Item Fields** or **Collapse All Additional Item Fields** to expand or collapse all of the Additional Item Fields sections.

Note: If an event is configured as **Auction**, you will not provide price information in the Items section. You will submit all other required response information, and then have the ability to **Launch Auction Console**, where bids can be submitted for items. See Auction Events for more information.

Review and Submit

The **Review and Submit** page contains a summary of all the sections of the events, and highlights any missing information that is required to submit the event response. You will not have the ability to click **Submit Response** until required information is completed.

Once all items are completed, click the certification statement and the button to **Submit Response**. The page will refresh with a confirmation that your response was submitted, and you can easily navigate to the portal Home Page, print the event details, or return to the Event Summary.

Upon close date for the event, the customer will review all supplier responses.

History link

An audit log is captured for event responses. Click the **History** hyperlink for the event to view the log of changes to the event responses. You can sort entries by date, user, action, section, subsection or context. Click on the Filter History hyperlink to see audit entries based on dates, type of action, or section for the event. You may also export the event history by selecting the **Export CSV** link.

Editing your Responses

You may edit your responses at any time while the event is still open. You may also click the **Withdraw Bid** button if you would like to withdraw your bid before the event closes. You may then edit responses and submit your bid again, if desired.

Q&A Board

The Q&A Board for the event is available until the event closes or until a separate date provided by the customer. See the Q&A Board section for details.

My Exports and Imports

The **My Exports and Imports** page provides status information and download files for Questions and Item export and import requests you have made. See the My Exports and Imports section for details.

Step by Step

The goal of this task is to respond to an event. **Note that not all of the sections will display in all events**. Responding to Sourcing Events will vary with the customer and the event. Following is intended to be basic steps which may or may not be on the specific events you are invited to

1. From your Supplier Network home page or a customer portal, find an Open sourcing event and select the **View Event** or **Respond** button.
   a. **View Event** displays if there are prerequisites that must be reviewed prior to seeing details and responding to the event.
   b. **Respond** displays when you can immediately begin responding to the event.
2. You are navigated to the Summary page of the Event. Note the event information including key dates, payment terms, contact information and a brief description of the event.
3. If the customer has included Prerequisites Required to View Event:
   a. Click on the **Proceed to Prerequisites** button, or click on the **Prerequisites** link in the left navigation panel for the event. You are navigated to the Prerequisites page for the event.
   b. Follow the instructions on the page. This may include selecting a checkbox to confirm you have read and agreed to the terms, and/or uploading a file per the customer's request.
      - File Uploads - You have the option to flag file uploads as a **Confidential File**. Only buyer users with specific permissions will have access to open such files.
   c. When finished completing the requirements on the page, click the button to **Save Progress**.

4. Set your **Intent to Bid**. You can do this either of these ways:
    a. Click the button in the banner, **Yes I Intend to Bid** or **No Bid**
    b. In the left navigation for the event, click the edit icon next to the Intent to Bid, and choose **I intend to bid on this event** or **No Bid**.
    c. If you choose No Bid, then no further action is needed.
5. View **Buyer Attachments**, if provided.
    a. Click on the **Attachments** link in the left navigation for the event.
    b. While on the Prerequisites page, click the **Next** button.
    c. Download and view attachments or URL links as needed.
6. Provide **Supplier Attachments**, as appropriate. You may select to add a file or URL link.
    a. Select **Add New Attachment**. dropdown and choose **Add New Attachment** or **Add Confidential Attachment**.
    b. To add a file, select to **File** as the **Attachment Type**. For **Confidential Attachments**, **File** is the only option and is read only. Multiple files can be uploaded at one time.
        i. Click **Select Files** to access a file selector from which multiple files can be selected, or drag and drop files to the gray box surrounding the **Select Files** button.
        ii. 4. The selected files are displayed in the overlay. Optionally, edit the file name entries so that the field contains a preferred file display name such as "Additional Information" or "References".
        iii. Click to **Save Changes** to complete the file upload and close the overlay.
        iv. The page refreshes with the selected files displayed. Confidential attachments display on the page with an icon ( ).
    c. To add a URL link. select **Link** as the **Attachment Type** (option not available for Confidential Attachments).
        i. Enter an optional **Name** for the link, such as "Company contact information" or "Terms and conditions" .
        ii. Enter the **URL** link address.
        iii. Choose a **Display Order**, if applicable.
        iv. Click to **Save Changes**.
    d. As new attachments are added, you may choose the **Display Order** as you add them to the page.

7. Answer **Questions** from the customer, if provided.

    a. Navigate by selecting the **Questions** hyperlink in the left navigation panel for the event, or by selecting the Next button when on the Attachments page.

    b. Required questions are indicated with a star, and must be answered in order to submit your response.

    c. Answer other questions as appropriate to give the customer complete information. For information on providing responses via import, see Export Questions and Import Question Responses exercises.

    d. Questions may be on multiple pages and grouped on each page.

    e. Navigate to each page by selecting the page hyperlink under the Questions section in the left navigation panel for the event.

    f. You may choose to import question responses by using the export/import feature. See the **Bid Response Import/Export Guide** found on the **Questions** page by selecting **Import Options > Get Import Instructions**

    g. On each page, click to **Save Progress** or click the **Next** button to save and proceed to the next page.

8. Provide **Item** data, if appropriate.

    a. Navigate by selecting the **Items** hyperlink in the left navigation panel for the event, or by selecting the Next button when on the last Questions

    b. Items are listed on the **Product Line Items** page and/or **Service Line Items** page. Items may be grouped within the same page. For information on providing responses to items via import, see the Export Items and Import Item Responses exercises.

    c. Items that require a unit price are indicated with a star. (**Note**: If this is an **Auction** event, you will provide prices in the Auction phase. See Providing Item Bids Via the Auction Console)

    d. The customer may allow you to edit the Quantity of some product or service items.

    e. You will also see an indication if an estimated delivery is required. This may be a specific date or a number of days after the award that delivery is expected.

    f. For service line items, enter an optional estimated service start/end dates, or number of days after the award the service will be performed.

    g. Enter a comment for each item, if appropriate.

    h. If the customer has configured **Price Component** fields, enter the appropriate values for fees (which will be added to the unit price) or allowances (which will be subtracted from the unit price) for each item. If such fields do not apply, select to provide an All-In Price for the item.

    i. If the customer has configured an item to allow alternates, select the Add Alternate Item if you would like to provide a similar item in your bid response. This may be in addition to or instead of the response to the original item. You may enter up to five alternates per item.

i. Provide a **Name** for the item. This field is required.

ii. Enter an optional **Description** for the item.

iii. Enter an optional **Catalog Number** for the item.

iv. The **Quantity**, **Unit of Measure**, and **Requested Delivery** information must be the same as the original item, and therefore is read-only.

v. Enter a **Unit Price** for the item. This field may be required. (**Note**: If this is an **Auction** event, you will provide prices in the Auction phase. See Providing Item Bids Via the Auction Console).

vi. Enter an **Estimated Delivery** (date or days after the award). This field may be required.

vii. Enter optional **Comments** about the alternate item.

viii. Enter optional or required information for any **Additional Fields** the buyer has included on the event items.

ix. When finished, click **Save Changes**.

x. The page will refresh, indicating the **ALT** item below the original item.

j. If the customer has provided **Additional Item Information**, you can enter responses directly on the page.

k. You may choose to import item responses by using the export/import feature. See the **Bid Response Import/Export Guide** found on the **Items** page by selecting **Import Options > Get Import Instructions**.

l. On each page, click to **Save Progress** or click the **Next** button to save and proceed to the next page.

9. Ask a **Question** of the customer regarding the event.

a. This action can be done at any time, as long as the Q&A Close Date has not passed and the event is still open.

b. Navigate by selecting the **Q&A Board** hyperlink in the left navigation of for the event.

c. Click the button to **Ask a Question**.

i. Enter a **Subject** for the question.

ii. Enter the **Question** text.

iii. Click to **Submit Question**.

iv. Question is recorded on the Q&A Board. If enabled, you will receive a notification when the customer responds to the question.

v. You may select the hyperlink to **Withdraw this Question** up until the time it is answered.

vi. View questions and answers from others that the customer publishes by selecting the Public Q&A tab on the Question & Answer board.

10. **Review and Submit** your response for the event.

    a. Select the **Review & Submit** hyperlink in the left navigation for the event.

    b. Any incomplete items are indicated with a warning message, with a hyperlink to navigate to the appropriate area.

    c. You do not have the option to certify or submit a response if you have not completed all required items.

    d. Once required items are completed:

        i. Select the checkbox **certifying** the statements you've made to be true.

        ii. Click **Submit Response**.

11. The page refreshes with a confirmation that your response was submitted. You may select to return to the event or to the customer portal home page.

12. If you have the **Confirmation that the Supplier Has Submitted A Bid** notification enabled, you will also receive an email confirming that the buyer has received the bid response. See **Notification Preferences**, on page 35 for additional information about enabling or disabling email and in-app notifications.

Your Award Summary

The **Your Award Summary** page displays after an event is awarded and only if your organization is awarded some portion of the event. The page lists information about the goods and services the supplier is expected to provide based on the adopted award strategy for a given event. See **Your Award Summary**, on page 129 for additional information.

Question Responses

As part of a sourcing event, the customer may include a list of questions for the supplier that require a response. Suppliers may respond to questions directly through the application, or may choose to export the questions (and any existing responses), populate answers in the file, and then import the information back into the application. This allows multiple staff to review the requested information and provide input without having to log into the application.

When responding through the UI, simply choose from the options provided for the questions, or enter in a free-form text response. Types of responses you may be asked for include:

- Yes or No
- A text value of up to 100 characters, or a text value of up to 2000 characters. If you attempt to enter more than the maximum amount of characters, you will receive an error message and allowing you to edit the data. You will not be allowed to save a value that is over the character limit.
- The Quantity of the item the customer would like for the event.
- Select a single value from a dropdown list provided.

- Select several values from a list provided.
- A number
- A date
- Grouped data such as insurance information
- A file upload (up to 25mb)
- A proforma contract for your review and edit. See Proforma Contracts in a Sourcing Event for more information.

Detailed information for exporting and importing question bid responses is available in the **Bid Response Import/Export** guide. You can download this guide from the **Questions** page by selecting **Import Options > Get Import Instructions**.

Event Questions Prepopulated from Registration Profile

Customers may choose to include Registration Profile questions in the Sourcing Event. When a user selects "Yes I Intend to Participate" for a sourcing event, some question responses will be automatically populated on the event form from the data contained in the associated fields within that Supplier's Registration Profile. The questions associated with any empty fields in a supplier's registration profile will remain blank. The user can manually enter data to answer these questions. If the empty field has an associated drop-down list in the Supplier Registration Profile, users will choose their answer from this drop-down list.

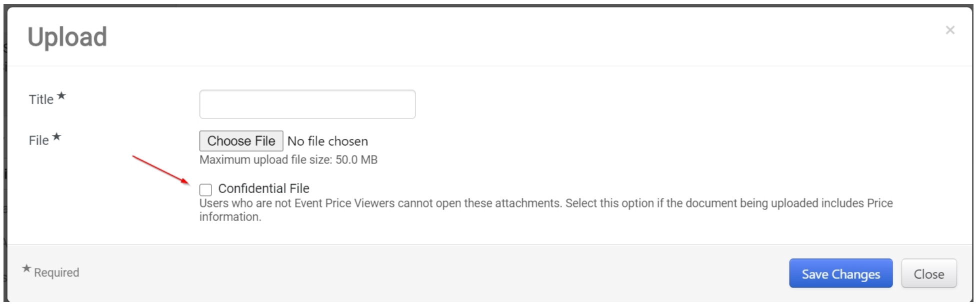
Customers can associate Supplier Profile **Grouped Data Sets**, such as insurance information, to a set of sourcing event questions. The first set of values for the grouped data found in the supplier profile is auto-populated to the associated set of event questions. If there is more than one group with the same name in a supplier's organization, supplier users will see a link labeled **Apply different responses from your Company Profile** beside the grouped field header. Clicking this link allows users to select a different set of group values for the associated event question responses.

Users can edit any of the data on the event form that has been populated from their Supplier Registration Profile. Supplier users can send data updates for certain question fields to their Supplier Profiles directly from within the event if they have the **Edit Company Profile** permission. The following profile field information can be updated from within the event:

- Number of Employees
- DUNS Number
- Website
- Business Description
- To update their Supplier Profile, users with the appropriate permission can click the **Update Profile** box located directly beneath the fields that can be updated from within the **Questions** section of the event.
- Changes to the Supplier Profile are logged in the event's **History** area in the Supplier's Network.

File Upload Questions

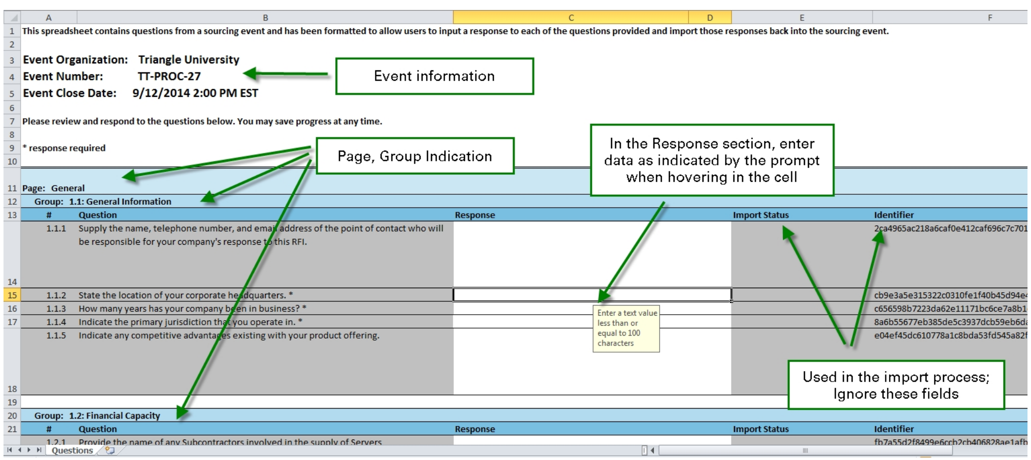
If a Question requests or requires a **File Upload** response, the overlay contains a **Confidential File** checkbox.



When flagged, a Confidential icon displays beside the uploaded file and at the top of the page. Files flagged as confidential can only be accessed by buyer users with specific permissions to view pricing data.

The Questions Template

The Questions template is available blank or with responses that have already been provided.



Note the following components of the Questions Export/Template File:

- Event Information - including the organization, Event name and number, and Close date/time.
- The Page and Group indications correspond to how information is presented in the application.
- # and Question as listed in the application. You cannot edit these fields. Questions that require a response in order to submit a bid are indicated with an *.
- Response - Here you will enter your responses. As you select the cell, text will indicate to you the

type of response that should be provided.

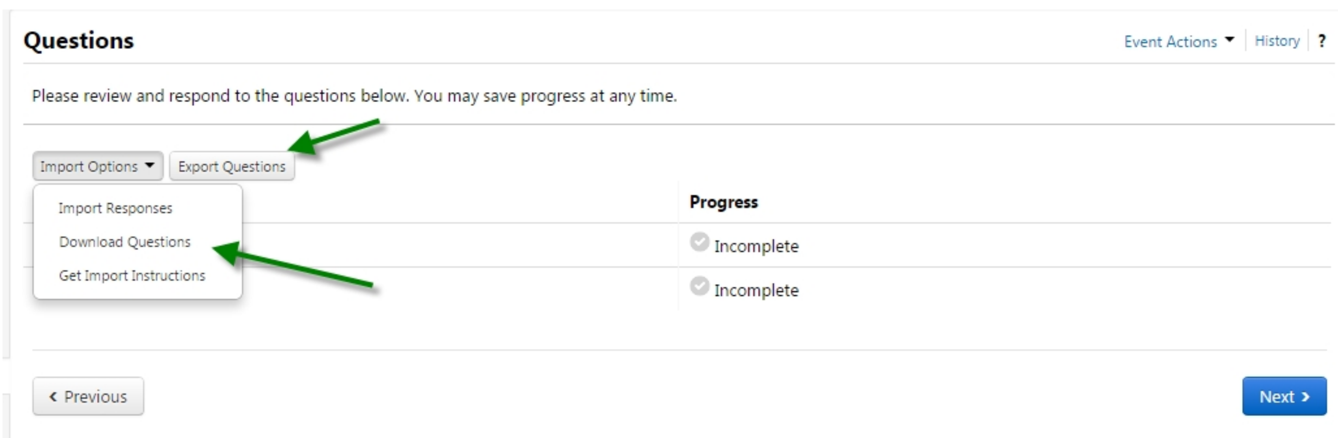
- Import Status and Identifier - These are fields used in the import process, and should be ignored when entering responses.

Exporting Questions

You may export question data in the following formats:

- **With any responses already provided**. If some responses have been provided in the UI or via a previous import, you may choose to export a file with those responses so you can change or add to them appropriately. This protects any previous answers you've provided.
- **As a blank template**. If you have entered some responses, they will not be included in the export. Therefore, whatever you enter in the template file and import will replace all other responses currently in the Event.

The Questions export may be requested by selecting to **Export Questions**, or by selecting **Import Options > Download Questions**. With the **Download Questions** option, you have the ability to download the template without any responses that may have been entered previously.



Step by Step

The goal of this task is to export the questions associated with an event.

Export Questions that includes current responses

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select to export questions with responses in either of these ways:
    a. Option 1: Select **Export Questions** button. In the **Export Questions** overlay, enter a **File Description**, indicate if you would like to receive an email when the file is ready, and click **Submit**.

b. Option 2: Select **Import Options > Download Questions.** In the **Download Questions** overlay, enter a **File Description**, and select to **Include Response Values**. Indicate if you would like to receive an email when the file is ready, and click **Submit**.

4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.
7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Export Questions as a blank template (with no response information)

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select to export questions without responses in either of these ways:
    a. Option 1: Select **Import Options > Download Questions.** In the **Download Questions** overlay, enter a **File Description**, and make sure the **Include Response Values** is NOT checked. Indicate if you would like to receive an email when the file is ready. Click **Submit**.
    b. Option 2: If no responses have been entered, you may select the **Export Questions** button. In the **Export Questions** overlay, enter a **File Description**. Indicate if you would like to receive an email when the file is ready and click **Submit**.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.
7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Preparing Question Responses

Once you have completed an export of questions, with or without responses, you may populate the file in order to import into the application. Please note the following when providing responses in the Question file:

- **You must click to Enable Editing at the top of the spreadsheet.** The file will open in Excel with a banner across the top indicating the file is in Protected View. You must click the **Enable Editing** button in order to enter data and save the file.
- **Required fields are indicated with a star**. Just as required fields are indicated in the application, they are also indicated in the file. You may import the file without the required information; However, the bid response is not considered complete and cannot be submitted to the customer until all required information is completed either via the UI or import.
- **Selecting a cell will show helpful information**. Because the type of response requested by the customer may vary with the question, help text will explain the format of the information that should be entered.
- **The file responses will override any current responses**. If you see any responses in the file you are using, take care if you change or remove that information. The import file responses will become the responses for the event in the application upon import, and any previous responses will be removed.

When providing responses in the Questions file, fields indicated in white are for your responses. The fields indicated in gray are read-only and may not be edited. Once you have provided the appropriate response information, save the file in .xls or .xlsx format for importing.

IMPORTING QUESTION RESPONSES

Once you have prepared your Question responses and have saved the Excel file, you may import the file back into the Event. Please note the following regarding Importing your data:

- The responses in the import file will override all responses in the application. Importing rows with blank data will remove any current data for those fields.
- An audit history will be captured for changes to responses.
- Any rows with errors will not be imported. All rows without errors will be imported.

The event must still be in an open status. You may want to confirm that no other responses have been entered for the Event questions since your export. Navigate to the event **Questions** page, and select **Import Options > Import Responses**, and following the instructions for importing the file.

Additional instructions are provided in the **Bid Response Import/Export Guide** found on the **Questions** page by selecting **Import Options > Get Import Instructions**.

Step by Step

The goal of this task is to import question responses for an event.

1. Navigate to the Open Sourcing Event for which you need to import question responses.
2. Select the **Questions** page from the Event's left navigation panel.
3. Select **Import Options > Import Responses.**
    a. The **File Action** defaults to **Import**. If you would first like to validate your file for errors without importing, select the **Validate** option.
    b. Enter a **File Description**.

c. Select if you would like to receive an email when the file is ready.

d. Click the **Choose File** button and select the file you have saved for import. Click **Submit**.

4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (Import or Validate) and the description you entered, along with the status of the request.
7. You may click to **Refresh this Page** until the file has completed processing and displays a status as follows.
    a. **Completed** - The file completed import (or validation) with no errors. All responses in the file are now reflected in the Event. You may review the **Output File** which contains confirmation that all rows were successfully imported.
    b. **Completed with Errors/Warnings** - The file completed import but there were some rows with errors. Review the **Output File** to make appropriate corrections.
8. You may view the audit log for changes to responses by selecting the **History** hyperlink on the event.

Proforma Contracts in a Sourcing Event

Customers with the Indirect Sourcing solution can attach a proforma contract to a sourcing event. Proforma documents are first drafts of contracts. They contain the basic elements of a contract, but not specific details. They allow suppliers to review a potential agreement and make changes and updates that may eventually be a part of the official contract agreement.

STEP-BY-STEP

1. Navigate to an open Sourcing Event in a customer portal.
2. Click **Questions** in the left menu.
3. Note the Question related to the proforma contract. Select the proforma contract name link to download the document.
    a. Open the document in and click **Enable Editing**.
    b. Click **Review** in the top ribbon and make sure **Track Changes** is turned on.
    c. Revise text and add comments, then save the revised file.

4. Return to the **Questions** page in the event, and under the same question that you downloaded the document from, click **Upload**.
    a. Enter a **Title** for the file to be uploaded.
    b. Click **Choose File**, search for and select the red-lined proforma contract on your local drive, then click **Save Changes**. The document is uploaded and appears as a link underneath the proforma question.
5. Continue creating your response to the event as described in Responding to Sourcing Events.

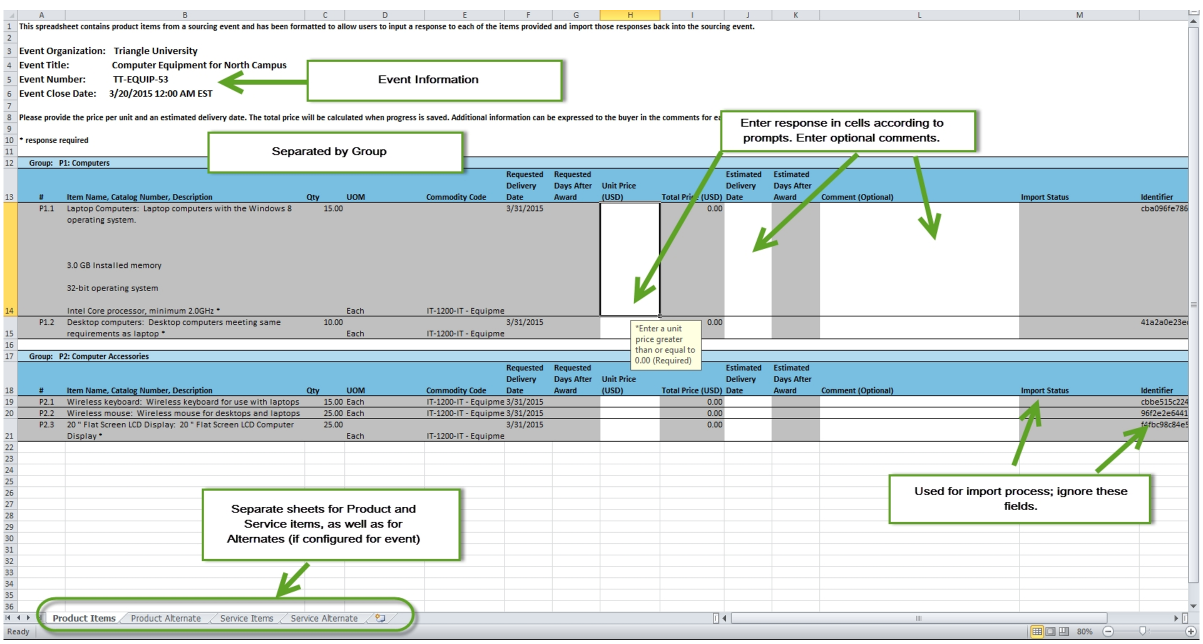
Item Responses

As part of a sourcing event, the customer may include a list of items for the supplier that require a response. Suppliers may respond to items directly through the application, or may choose to export the items (and any existing responses), populate values in the file, and then import the information back into the application. This allows multiple staff to review the requested information and provide input without having to log into the application.

Detailed information for exporting and importing item bid responses is available in the **Bid Response Import/Export** guide. You can download this guide from the **Items** page by selecting **Import Options > Get Import Instructions**.

The Items Template

The Items template is available blank or with responses that have already been provided.



Note the following components of the Items Export/Template File:

- Event Information - including the organization, Event name and number, and Close date/time.
- The Group indication corresponds to how information is presented in the application.
- Worksheets for Product Items and Service Items, as well as Product Alternates and Service Alternates. You will only see the options configured for items on the event. For example, if Alternates are not allowed, you will not see the Alternate sheets.
- # and Item Information as listed in the application. You cannot edit these fields. Items that have required response fields (unit price and/or estimated delivery date) in order to submit a bid are indicated with a star (★).
- Quantity - The customer may allow editing of the Quantity field for some or all items. If it is editable, it will not appear as greyed out, and the supplier can enter an appropriate quantity for the item. An example of why the customer may make the quantity field editable for a line item: If attempting to contract with a firm for architectural services, the buyer could ask the vendor to provide details on the rate for the targeted skills needed to address the deliverable, and the quantity of hours (or appropriate units of time) necessary to calculate a price for the targeted work product to be completed.
- Unit Price - When selecting the field, you will see a message if a response is required. You may enter information in this field unless the event is an Auction type. For Auction events, you will provide the unit price in the Auction Console after you have submitted all other required information and the Auction has started. Note: Price fields are displayed in the number format associated with the **Country** selected in logged in user's profile. If the user does not have a Country selection in their user profile, numbers are displayed in the United States format.
- Total Unit Price and Total Price - These fields are included if the event is configured with Price Components, and are read only. The additional price components fields are included and editable. If Use All-In Pricing is changed to Yes, the Price Component fields become uneditable. See **Itemized Price Components in Sourcing Events**, on page 118 for additional information.
- Estimated Delivery Date or Days After Award (products), Estimated Service Start/End Dates or Days after Award (services), Comments - You may enter data in these fields. As you select the cell, text will indicate to you the type of response that should be provided, and if the particular field is required.
- Additional Fields added by the Buyer - Customers may choose to add other item fields that allow or require your response. If the buyer has included conditional questions, the child/grandchild questions are not available for entry and shaded gray until the previous parent question has been answered. If an additional field does not apply to a particular item, the field will remain gray and not editable.
- Import Status and Identifier - These are fields used in the import process, and should be ignored when entering responses.

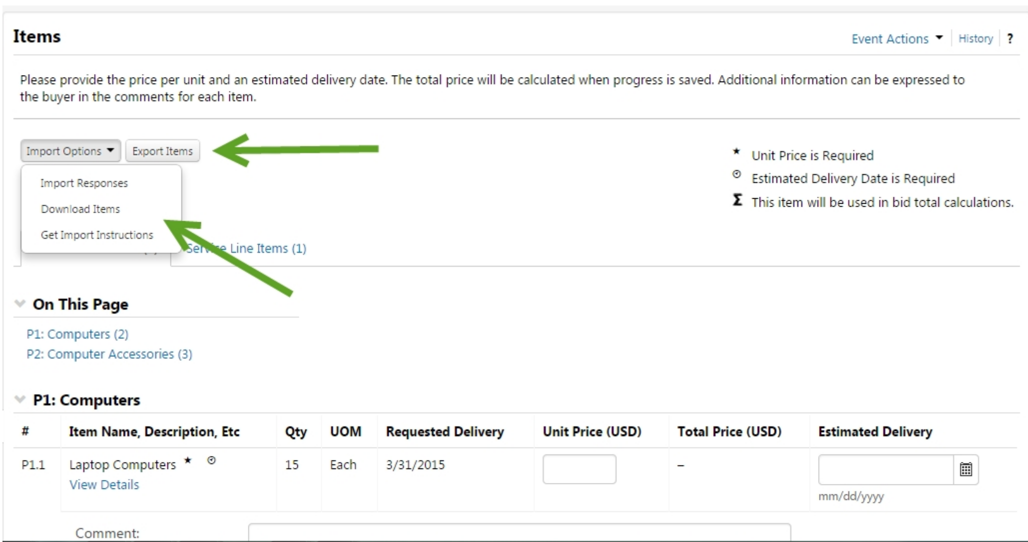
Exporting Items

You may export item data in the following formats:

- **With any responses already provided**. If some responses have been provided in the UI or via a previous import, you may choose to export a file with those responses so you can change or add to them appropriately. This protects any previous answers you've provided.

- **As a blank template**. If you have entered some responses, they will not be included in the export. Therefore, whatever you enter in the template file and import will replace all other responses currently in the Event.

The Items export may be requested by selecting to **Export Items**, or by selecting **Import Options > Download Items**. With the **Download Items** option, you have the ability to download the template without any responses that may have been entered previously.



Step by Step

The goal of this task is to export the items associated with an event.

Export Items that includes current responses

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Items** page from the Event's left navigation panel.
3. Select to export items with responses in either of these ways:
    a. Option 1: Select **Export Items** button. In the **Export Items** overlay, enter a **File Description**. Indicate if you would like to receive an email when the file is ready, and click **Submit**.
    b. Option 2: Select **Import Options > Download Items.** In the **Download Items** overlay, enter a **File Description**, and select to **Include Response Values**. Indicate if you would like to receive an email when the file is ready, and click **Submit**.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.

7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Export Items as a blank template (with no response information)

1. Navigate to an open Sourcing Event. Make sure you have accepted all required Prerequisites and have declared your Intent to Bid.
2. Select the **Items** page from the Event's left navigation panel.
3. Select to export items without responses in either of these ways:
    a. Option 1: Select **Import Options > Download Items.** In the **Download Items** overlay, enter a **File Description**, and make sure the **Include Response Values** is NOT checked. Indicate if you would like to receive an email when the file is ready, and click **Submit**.
    b. Option 2: If no responses have been entered, you may select the **Export Items** button. In the **Export Items** overlay, enter a **File Description**, indicate if you would like to receive an email when the file is ready, and click **Submit**.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (export or template) and the description you entered, along with the status of the request.
7. When the request status is **Completed**, an **Output File** is displayed.
8. Click the **Output File** name to download and open the file.
9. When you have saved the file, click **Delete** to remove it from the list of exports.

Preparing Item Responses

Once you have completed an export of items, with or without responses, you may populate the file in order to import into the application. Please note the following when providing responses in the Items file:

- **You must click to Enable Editing at the top of the spreadsheet.** The file will open in Excel with a banner across the top indicating the file is in Protected View. You must click the **Enable Editing** button in order to enter data and save the file.
- **Required fields are indicated with a star**. Just as required fields are indicated in the application, they are also indicated in the file. You may import the file without the required information; However, the bid response is not considered complete and cannot be submitted to the customer until all required information is completed either via the UI or import.
- **Selecting a cell will show helpful information**. Because the type of response requested by the customer may vary with the item, help text will explain the format of the information that should be entered.

- **The file responses will override any current responses**. If you see any responses in the file you are using, take care if you change or remove that information. The import file responses will become the responses for the event in the application upon import, and any previous responses will be removed.

When providing responses in the Items file, fields indicated in white are for your responses. The fields indicated in gray are read-only and may not be edited. The fields in which you will provide information are Unit Price, Estimated Delivery Date or Days After Award, and an optional Comment. Once you have provided the appropriate response information, save the file in .xls or .xlsx format for importing.

PRODUCT ALTERNATE AND SERVICE ALTERNATE SHEETS

If the customer has configured items to accept alternates, you will see the Product Alternate and/or Service Alternate sheets in the file. Select the appropriate tab if you would like to submit alternate items for consideration in addition to or instead of bidding on the original item. In addition to the fields you complete for original items, you will also include an Item Name, Catalog Number, and/or Description for the alternate items.

- Original items are listed in grey shading and the information cannot be edited.
- You have the option of including up to five alternates per item. The Alternate items are automatically numbered in the spreadsheet.
- Alternate items have the same requirements as the original item. For example, if Unit Price is required for an original item, it must also be provided for alternate(s) to that item.

IMPORTING ITEM RESPONSES

Once you have prepared your Item responses and have saved the Excel file, you may import the file back into the Event. Please note the following regarding Importing your data:

- The responses in the import file will override all responses in the application. Importing rows with blank data will remove any current data for those fields.
- An audit history will be captured for changes to responses.
- Any rows with errors will not be imported. All rows without errors will be imported.

The event must still be in an open status. You may want to confirm that no other responses have been entered for the Event questions since your export. Navigate to the event **Items** page, and select **Import Options > Import Responses**, and follow the instructions for importing the file.

Additional instructions are provided in the **Bid Response Import/Export Guide** found on the **Items** page by selecting **Import Options > Get Import Instructions**.

Step by Step

The goal of this exercise is to import item responses for an event.

1. Navigate to the Open Sourcing Event for which you need to import item responses.
2. Select the **Items** page from the Event's left navigation panel.
3. Select **Import Options > Import Responses.**
    a. The **File Action** defaults to **Import**. If you would first like to validate your file for errors without importing, select the **Validate** option.
    b. Enter a **File Description**.
    c. Select if you would like to receive an email when the file is ready.
    d. Click the **Choose File** button and select the file you have saved for import. Click **Submit**.
4. You will see a confirmation message that your request has been submitted.
5. Navigate to the **My Exports and Imports** page of the Event from the left navigation panel.
6. The request will be listed with the type (Import or Validate) and the description you entered, along with the status of the request.
7. You may click to **Refresh this Page** until the file has completed processing and displays a status as follows.
    a. **Completed** - The file completed import (or validation) with no errors. All responses in the file are now reflected in the Event. You may review the **Output File** which contains confirmation that all rows were successfully imported.
    b. **Completed with Errors/Warnings** - The file completed import but there were some rows with errors. Review the **Output File** to make appropriate corrections.
8. You may view the audit log for changes to responses by selecting the **History** hyperlink on the event.

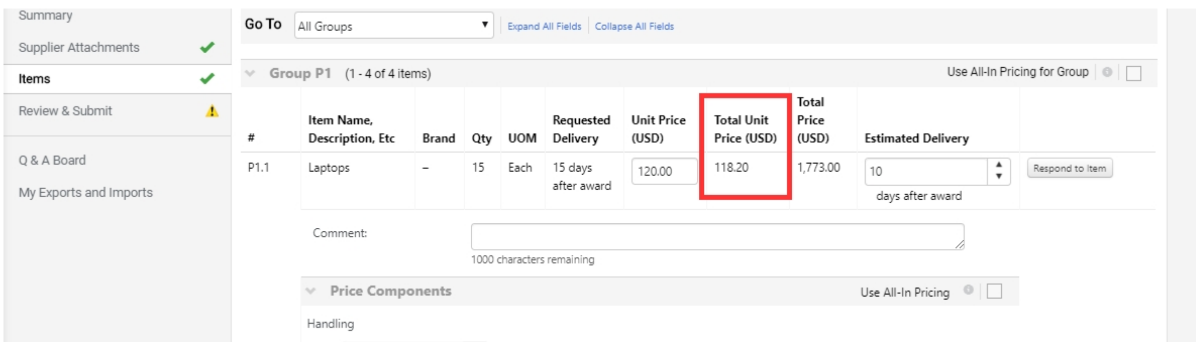
Itemized Price Components in Sourcing Events

Price component fields support an itemized view of price factors, such as fixed freight costs and import duties, that affect the total bid prices submitted against sourced items. As a result, price components provide pricing details that are useful to the customer in evaluating event responses. Customers can choose to configure **Price Components** for a sourcing event that allow the supplier to provide price-impacting fees and allowances.

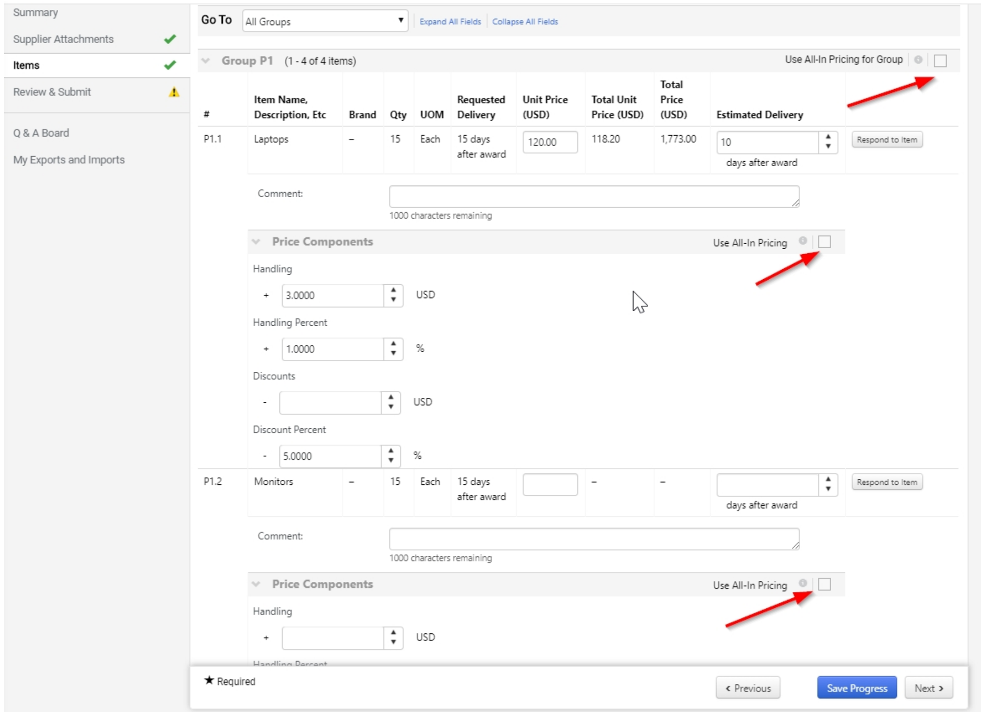
If configured, suppliers will see new **Price Components** section on the event that contains fields where fees and/or allowances can be entered per item. Also, a calculated **Total Unit Price** will show for each item, which will automatically calculate the provided Unit Price along with the provided fees (+) and allowances (-) for each item, to give the buyer a **Total Calculated Price**. If suppliers are unable to break down their bids for any event items to the level specified by the price component fields, they can by-pass the price components and submit an **All-In** bid for those items. Suppliers can also propose up to five alternates for each item that include price components.

RESPONDING TO A SOURCING EVENT WITH PRICE COMPONENT FIELDS INCLUDED

- If configured by the customer, supplier users will see a **Price Components** section for each item on the **Items** page of the event. The **Price Components** section allows the user to enter price details such as fees and allowances that impact the actual price for the item. If the **Price Components** have been designated as mandatory, suppliers must respond in this section. Please note that when submitting an All-In bid for an item (described below), population of the required Price Component fields will not be enforced.
- Sourcing Events may vary in the specific **Price Component** field names that are displayed, as the fields are configured per event by the customer. However, the fields will one of the following:
  - Fee - A supplier can enter an additional fee amount or percentage to be added to the base price of the item.
  - Allowance - Enter an allowance amount or percentage that will be subtracted from the base price of the item.
- If at least one product or service item includes **Price Component** fields, a **Total Unit Price** column is displayed on the event's **Items** page. This number is the **Unit Price** plus any additional pricing points that are entered by the supplier in **Price Component** fields. The value in the **Total Unit Price** is used in bid total calculations during the customer's evaluation process.



- **Price Component** fields may be designated as mandatory; however, suppliers can select to **Use All-In Pricing** at the group or product/service level to by-pass the fields, if they are unable to segment their bids at the Price Component field level.



- The checkbox acts as a toggle; the **Price Component** fields for the product, service or group are hidden when the checkbox is selected and expanded when the checkbox is not selected.
- If a supplier selects the checkbox after entering values into the **Price Component** field(s), the values are erased.

- If configured for the event, the **Price Component** section is included for each item (product or service) individually.
- When providing Alternate Items, the **Price Components** section is available if configured for the event. Suppliers can propose up to 5 alternate items for each item configured within the event.

Price Components in Import/Export Item Responses

When **Price Component** fields are used in an event, the Item Export and Import Files are updated accordingly.

- The included **Price Component** fields that are configured by the customer.
- A **Use All-In Pricing** column is included, and defaults to No. If Yes is selected, the **Price Component** fields become read-only and cannot be edited.
- A calculated **Total Unit Price** column is included in the file. This field:
  - is the multiplier for calculating the **Total Price** column content, rather than the **Unit Price**.
  - defaults to null (-) when no Unit Price value is indicated.
  - defaults to Unit Price when All-In column is set to Yes.
- Updated fields are included for products, services, and alternate items worksheets.

Auction Events

Customers with the Indirect Sourcing solution have the ability to create reverse auction events. When an event is an auction, suppliers must declare their **Intent to Bid** and complete all **Prerequisites** before they are allowed to participate in the auction phase of the event. Suppliers submit bids and monitor auction progress via an **Auction Console** interface. The customer determines the auction close date, as well as the close date for all other information required for the bid response, which may be the same date as the auction close or later. The supplier receives a notification when the auction closes. Once the auction and event close, the event will enter the customer's evaluation workflow process in the same way as all other sourcing events.

If a customer has the ability to design Auction events, you will see an **Auction Events** row in the customer's Sourcing Event's widget of the home page.

A notification preference for **Upcoming launch of Event Auction phase** is enabled for supplier users with access to Sourcing Events by default. This notification alerts the user 24 hours prior to the start of the event's auction phase. The primary contact for the supplier will automatically receive this notification, regardless if the preference is enabled.

MOCK OR LIVE AUCTIONS

Customers may ask you to participate in Mock or Live auctions. Mock auctions are simply practice events, and the event is not actually awarded. Live events are like any other sourcing event, and will be awarded based on supplier responses. A buyer will indicate within the event if it is a Mock event.

PARTICIPATING IN AUCTION EVENTS

When accessing an Auction event, you must set your intent to bid and accept any prerequisites required by the buyer in order to view details or submit responses, as with any other sourcing event. Access the event information available on each page, and provide responses except for item prices. A banner message displays indicating when the Auction will start.

Important: You must declare your intent to bid and complete any prerequisites for the event prior to the Auction start time. If you do not, you will not have access to the Auction phase of the event. The customer can require that all other responses associated with the event be completed by the same close date or after the auction closes.

Once you set your intent to bid and completed prerequisites prior to the Auction start time, you will have the ability to **Launch Auction Console** for the event. Select the **Event Schedule** link to see all the auction and event dates and times.

THE AUCTION CONSOLE

When **Launch Auction Console** selected, the Auction interface opens in a new window. If the Auction start time has not been reached, you will see the status is **Pending**, and a timer indicates the amount of time until the Auction start.

The information displayed for each item depends on the buyer's configurations of what suppliers are allowed to see. The information will vary with each customer and event.

Buyers and suppliers can communicate directly from within the Auctions console using the Chat tab that appears in the lower right of the screen. Buyers can communicate with all suppliers, while suppliers can only communicate with the buyer. Messages can still be sent when the recipient is offline, and will appear when the user returns to the Auctions console.

SUBMITTING BIDS

Once the Auction start time is reached, you can begin entering bids. Enter a bid for an item and select the submit icon . You can enter bids for multiple bids and select the **Submit Bids** button to provide multiple bids at once.

The system will indicate your bid is **Pending**, and then the state will update to **Accepted** or **Rejected**. . You will see additional information as allowed by the buyer. As other suppliers enter bids, you may see information on the low bid and supplier with the lowest bid (as an alias).

If the bid is Rejected, you may select the Rejected stamp to see additional information and to discard the bid and your previous bid will remain active. Reasons a bid may be rejected include:

- It did not meet bid decrement requirements
- It did not meet minimum or maximum restrictions
- It was a duplicate of the previous bid

Note: Some buyers may configure the Auction so that you must enter a bid within a specified amount of time from the Auction start. For example, the auction may be configured that you must submit an initial bid within 30 minutes of the Auction start in order to participate. If the Auction is configured this way and you do not enter your initial bid in the initial time frame, you will see a message indicating you cannot participate.

BID HISTORY

You can see a history of your bids by selecting the Bid History link in the top navigation. Sort the history by any of the available information. You can export the information into Excel or CSV format by selecting the **Export** button in the top right.

Requested exports are available by selecting the **Downloads** link in the top navigation.

AUCTION END

When the auction has ended, you will see an indication of the **Final** award from the customer

Step by Step

The goal of this task is to provide bid responses to an Auction event via the **Auction Console**.

1. Navigate to the Released or Open Sourcing Event that is an Auction.
2. Complete all required **Prerequisites** and declare your **Intent to Bid**. You will not have access to the auction if you do not complete this task.
3. Select the **Launch Auction Console** button from any of the following areas:
    a. When viewing the event, the **Launch Auction Console** button is in the left navigation.
    b. When viewing the event in a list of sourcing events, **Launch Auction Console** is a selection button on the right.
4. The **Auction Console** opens in a new window.
    a. If the Auction Start Date/Time has not been reached, the Status will show as **Pending** and you will not have the ability to enter bids. A counter displays the amount of time until the Auction start.
    b. Note that the information displayed for items varies with each customer/event.
5. When the Auction status displays as **Open** (a green banner across the bottom), you may enter bids.
6. Submit bids by entering a value for one or more items, and click the **Submit Bids** button.
7. The **State** of the bid will show as **Pending**, and then refresh to **Accepted** or **Rejected**.
    a. If the bid is **Accepted**, you will see the status of the item bid (information displayed is dependent on the customer's configurations for the event).
    b. If the bid is **Rejected**, select the Rejected icon to see a message related to the rejected bid. Select to remove the value.
8. If configured by the buyer, you will see low bid amount and supplier information.
9. As you submit subsequent bids, you may be restricted to specific bid increments.
10. Select **Bid History** in the top navigation to review a log of your submitted bids.
    a. Sort information by any column.
    b. Select to Export the information to an Excel or CSV format by selecting the **Export** button in the top right.
    c. Select the **Downloads** link in the top navigation to access requested exports.
11. Select **Chat** to open a window to chat with the Auctioneer for the event.
12. Once the Auction closes, you will no longer have the ability to submit bids. Some customers may enforce restrictions that prevent last minute bids.
13. If the Event Close Date is later than the auction close date, you will have the opportunity to complete additional response information (except for prices) in the event, and Certify and Submit your response.

Exporting Sourcing Events

Users with access to view customer's Sourcing Event have the ability to export event information. The user may select to export all or only parts of the event. Exports are available on a **View Exports** page in the customer portal to display requested export files. Suppliers may choose to enable the Notification Preference for **Sourcing - Exports** to be notified when an export request has been completed.

Any user with access to an event (view or edit) can access the option to **Export Event**. The supplier must have accepted any required prerequisites to view the event in order to see the option to Export from either of the following locations:

- from Event search results, the **View Events** dropdown; and
- when viewing an Event, in the **Event Actions** dropdown.

When selecting to **Export Event**, an overlay displays with the following:

- **Confirmation of the Event** being exported
- **File Name**: This information is required. Enter a name for the file to be exported.
- **Export Description**: Enter an optional description for the export.
- **Content to Export**: Select from these options:
  - All event sections, responses and attachments - With this option, all information in the event will be exported.
  - Let me pick – When selecting this option, the user can choose to export only specific parts of the event information. Only sections pertinent to the particular event being exported will be shown.
- **Email when export is ready**: You may select to receive an email when the export is ready. The checkbox will be enabled (or not) according to your selection for the **Sourcing - Exports** Notification Preference in your user profile, but can be changed for this export request. Select the **What's This** hyperlink in the overlay for more information

Once the user has submitted the export, a confirmation displays with a link to navigate to the export page.

EXPORTS FOR MULTI-STAGE EVENTS

If you select to export an event that is part of multi-stage event, you are given the following options in the overlay for Content to Export:

- **Current Stage: All Sections, Responses, and Attachments** - With this option, all information in the event will be exported for only the current stage.
- **Event: All Stages, Sections, Responses and Attachments** - This option will export all information for all stages associated with this event stage.

- **Customize Export** - This option allows you to choose specific stages to export, and the specific content within those stages to export:
  - **Event Stages(s)** - Select from your named event stages
  - **Stage Content** - Select from the same options as for a single event:
    - **All event sections, responses and attachments** - With this option, all information in the event will be exported.
    - **Let me pick** – When selecting this option, the user can choose to export specific parts of the event information. Only sections pertinent to the particular event being exported will be shown.

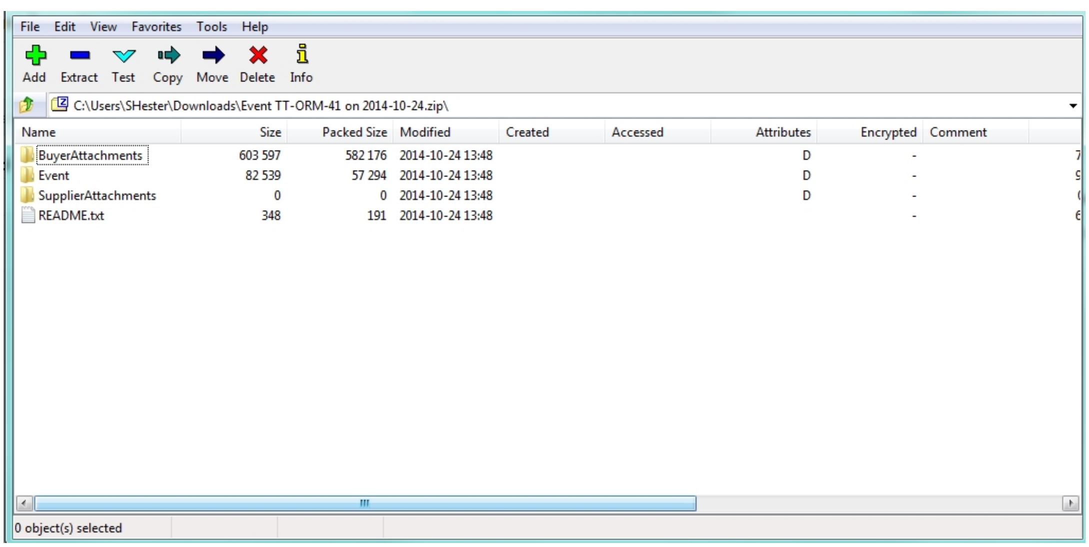
The Exports Page

Exports are located on a new page available at **Sourcing > Sourcing Events > View Exports** in the customer portal. Any user with access to view an event will have access to this page. However, a user will only see exports for events to which they have access.

- The status of the export request displays. If it has not completed, the user may select the Refresh this Page option to see an updated status.
- A message displays indicating the number of days before the file will be deleted from the page. You may also select to manually delete an export by selecting the row and clicking **Delete Selected Exports** link.
- Click on the File Name to open or save the zipped file.

THE EXPORT FILE FORMAT

The Event information is exported into a zipped file format, with individual folders and files.



- **Event** folder contains the PDF file with the event information except for attachment and supplier response details. This folder also contains the audit history file for the event.
- **Buyer Attachments** folder contains the attachments the buyer has added to the event, organized by the page on which they are included.
- **Supplier Attachments** folder contains the attachments the supplier has added to the event.

EXPORTING EVENT HISTORY

The Event History may be exported as a single file. When viewing an event, select the **History** hyperlink to open the audit history window, and then select the **Export CSV** link. The file may be opened or saved immediately.

Step by Step

The goal of this exercise is to export information for a sourcing event. The export request may originate from event search results or from the event. **Note**: The user must have accepted any required prerequisites for the event.

From Event Search Results

1. Refer to the Search for Sourcing Events exercise and view results.
2. Click the drop-down for the **View Event** button, and select **Export Event**. Proceed to Step 3 below.

From Event View

1. Access a Sourcing Event from the Sourcing Event widget on the network or customer portal home page, or select an Event from search results.
2. Click the **Event Actions** hyperlink, and select **Export Event**.

Defining the Export Information

3. An **Export Event** overlay displays. The Event to Export is listed.
4. Enter a **File Name**. The file name defaults to the event number and description but may be edited. This information is required.
5. Enter an optional Export **Description**.
6. For **single stage events**, select the **Content to Export**:
    a. **All event sections, responses and attachments** - With this option, all information in the event will be exported.
    b. **Let me pick** - When selecting this option, the user can choose to export only specific parts of the event information. Only sections pertinent to the particular event being exported will be shown.

7. For **multi-stage events,** select the **Content to Export:**

   a. **Current Stage: All Sections, Responses and Attachments**. With this option, only the current stage information will be exported.

   b. **Event: All Stages, Sections, Responses, and Attachments**. With this option, all of the event stages will be exported. The information for each stage will display in separate folders in the zip output file.

   c. **Customize Export**. Choose this option to select specific stages and/or specific event sections to include in the export request. Additional options will display as listed in step **6**.

8. **Email when export is ready**: You may select to receive an email when the export is ready. The checkbox will be enabled (or not) according to your selection for the **Sourcing - Exports**Notification Preferences in your user profile, but can be changed for this export request. Select the **What's This** hyperlink in the overlay for more information.

9. Click to **Submit** the export. A confirmation displays with a button to navigate to the export file page.

10. On the **Sourcing > Sourcing Events > View Exports** page, click the **Refresh this Page** button until the status of the export shows as **Completed**.

11. Click to download the zipped file, and select to open. Access the files in the folders as needed.

Export Event History as a Single File

1. You may export Event History as a single file, without have to export all other event information. To access the audit history, select an event to view.

2. Select the **History** hyperlink to open the audit history window, and then select the **Export CSV** link.

3. Select to save the file or open immediately. The file is not generated to the View Exports page.

Q & A Board

Each event has a Question & Answer (Q&A) Board available to enhance communication between buyers and suppliers. In the Q&A Board:

- Customers can...
  - Effectively monitor, review, select and answer questions submitted by suppliers.
  - Submit questions directly to suppliers.
  - Respond publicly to all suppliers or privately to specific suppliers.
  - Define the allowable time frame for event question submissions.

- Suppliers can...
  - Submit questions to customers.
  - Respond to customer questions and responses.
  - Ask follow up questions to customer responses.

Access the Q&A Board by selecting the **Q&A Board** link on an Event. Questions and answers can be posted until the customer-configured **Q&A Submission Close Date** for the event. The Q&A Board is organized into three tabs:

1. **Public Q&A** - contains event questions/answers that have been made public by the customer. All suppliers who have access to the event can see questions/answers that have been made public. Questions/Answers that are not made public are only seen by the supplier who asked the question.
2. **My Questions** - contains event questions and responses that the supplier has entered.
3. **Buyer Questions** - contains event questions and responses that the buyer has submitted directly to the supplier.

To ask a question, click the **Ask a Question** button and enter a title and text for the question. You may select to **Withdraw This Question** up until the customer responds. When a customer has responded to a question, you can click to **Ask a Follow Up Question** related to the response. Questions and responses show when the question/response was entered and by whom, except for public questions which do not show the supplier who asked the question.

In the **Attachment** field, suppliers and buyers can upload a document to a question or answer. There is a maximum of one attachment per question or answer. A link to the file is displayed next to the question or answer on the Q&A Board.

- Anyone who can view a question or answer on the Q&A Board can view, upload, or download its attachment.
- When a customer responds publicly to a supplier question that has an attachment, they have the option to remove the supplier attachment before posting publicly.

You may subscribe to receive an email or notification when a customer asks a question, responds to a question from you or responds to a question that is public. To set notification preferences, navigate to your User Profile in the JAGGAER ONE Supplier Network.

For more information about submitting a question, see Responding to a Sourcing Event.

My Exports and Imports

The **My Exports and Imports** page provides status information and download files for the Questions Items export and import requests you have made. You will see an indication of how long files will be available on the page. A best practice is to download and save the file for your own use so it is readily available when needed.

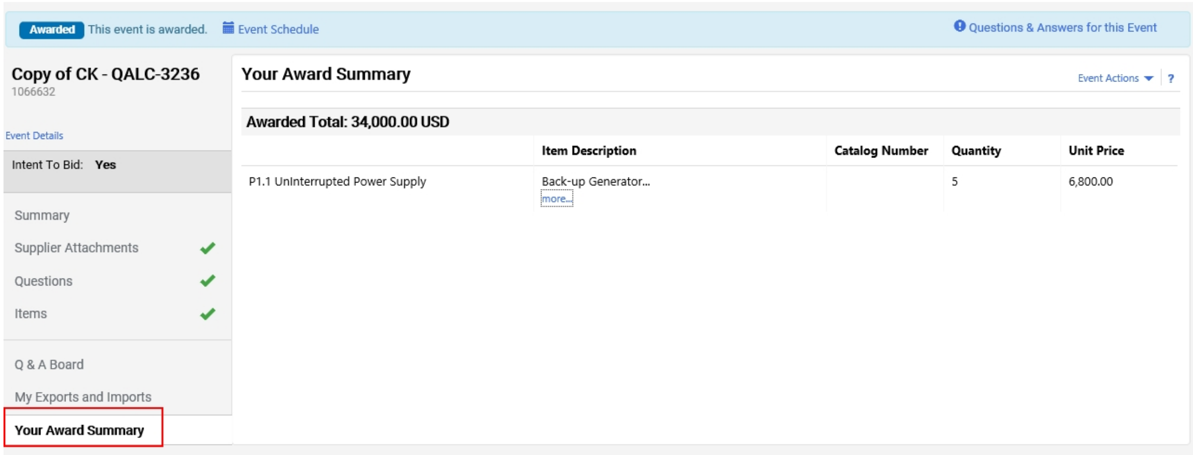
The **My Exports and Imports** page includes the following information:

- **Type**: Indicates if the request was to import, export, validate or to download a template.
- **Collateral**: Indicates if the export is the Question information or Item information.
- **Description**: The description entered when requesting the export/import.
- **Requested by**: The user who requested the export/import.
- **Requested at**: The date and time the request was made.
- **Status**: The current status of the request.
  - **Pending** - The request is currently being queued by the system. Select the Refresh this Page button to see an updated status.
  - **In Process** - The request is processing. Select the Refresh this Page button to see an updated status.
  - **Completed with Errors/Warnings** - The request finished, but there were errors or warnings. This may mean that not all of your responses imported. View the Troubleshooting section for more information.
  - **Completed** - The request completed and there were no errors or warnings. You can view the updated information in the event.
- **Output File**: The file associated with the request. These are named by the system and include the event number and date.
  - If for an Export or Template request: The requested export or template.
  - If for a Validate or Import request: The validated import file listing any errors or warnings.

You may **sort** on any of the columns (except for Output file) by selecting the arrow next to the column name. You may also choose to **Delete** a file if you have saved it for future use and no longer want to see it displayed on the page.

Your Award Summary

The **Your Award Summary** page displays information about the goods and services the supplier is expected to provide based on the adopted award strategy for a given event. This page is visible immediately after the award action is performed by the customer.



Note: The **Your Award Summary** page is only visible if the supplier organization was awarded some portion of the event.

Customer Proxy Bid Responses to Events

To allow customers more flexibility in the bidding process, a customer may configure a sourcing event to allow proxy bids. The proxy bid allows the supplier to mail, email or phone in a bid to the buyer. The buyer may then access the sourcing event as a supplier would see it in their portal, thereby making it easier to complete the bid information online on the supplier's behalf. The supplier will receive an email notification when a customer begins entering a proxy bid for a sourcing event. The supplier may continue to respond to the event as well. The supplier should enable the **Proxy Bid has been received by the buyer** selection in Notification Preferences.

Event Amendments from Buyers

A customer may decide to amend an event once it is open to suppliers. They may need to add more information, ask another question, or add items for bidding. Whether or not you have submitted your response, you will be made aware of the amendments and be given the opportunity to update your responses.

A supplier user with access to a sourcing event will receive an email and in-app notification when a customer amends an open event. You can view the amendments by selecting the hyperlink **View amendment changes**.

Internal Evaluation Stage Events

After a supplier has submitted a response to a sourcing event, customers may choose to configure an Internal Evaluation Stage for the event. When viewing an event that is in an Internal Evaluation Stage, the supplier does not declare an Intent to Bid or respond to specific criteria. The only pages visible for an Internal Evaluation Stage event are **Summary**, **Q&A Board**, and **My Exports and Imports**. The event is considered Closed during this stage, as the customer is conducting an internal review of information. However, the supplier can interact with the customer regarding the event via the **Q & A Board**. See Q & A Board for additional information.

If you select to **Export** the event information, only the information visible during this stage will be in the export file.

Searching for Events

Sourcing Events to which you have access are readily available from the Sourcing Events widget on the home page or within a customer portal. You can also search for events by navigating to **Sourcing > Sourcing Events > Search Events**.

The search defaults to the advanced search where you can search by various criteria.

- **Sourcing Event Identification** - Search by event number, if known. In the Network view, you can also search but Customer Name.
- **Sourcing Event Information** - Search by date type and criteria, or by a specific supplier if your organization manages multiple suppliers within the same Supplier Network portal. In a Customer Branded Portal, you can also search by Event Type.
- **Event Status** - Search by one or more event status.
- **Intent to Bid** - Search for events for which you have set your intent to bid as Yes or No, or have not set.
- **Response Status** - Search for events by your response status.
- **Bid Strategy** - Search for events that use or do not use the sealed bid process.
- **Auctions** - Search for events that are Mock Auctions, Live Auctions, or All Auction types.

When criteria is selected, click **Go** to see search results. You are only shown events to which you have access.

Step by Step

1. From the **Supplier Network** or the **Customer Portal**, navigate to **Sourcing > Sourcing Events > Search Events**.
2. If you know the Event Number, enter it into the **Event Number** field and select **Go**.

3. If you are in the Network view and want to see events from a specific customer, begin entering the **Customer Name**, or click the search icon to search and select from available customers. You may select multiple customers. **Note**: This field is not shown when viewing the advanced search from within a customer portal.
4. If you want to see events based on certain **dates**:
    a. Select from the dropdown to see events based on **Release Date**, **Open Date** or **Close Date**.
    b. Select from the dropdown to see events based on a date range: Select a predefined range or select **Custom Date Range** and enter your own criteria.
5. If your organization manages several supplier accounts within the same Supplier Network portal, you may want to see events based on the supplier invited to the event.
    a. Begin entering a **Supplier** name and select from the results.
    b. Click the search icon to see a list of all suppliers managed within your network, and click the appropriate suppliers.
6. Select to view events with a specific **Event Status**. Select one or more status fields.
7. Select to view events for which you have or have not set an **Intent to Bid.**
8. Select to view events with a specific **Response Status**: **Not Started**, **Draft**, or **Submitted**.
9. Select to view events based on the **Bid Strategy**: whether or not the event uses sealed bids, does not use sealed bids, or both.
10. Select if you would like to see events that are Mock Auctions, Live Auctions, or either type of **Auction**.
11. When you have entered the appropriate criteria, click **Go** to see results.

Event Search Results

Once you have entered your search criteria, search results for events you have access to will display. Included on the search results page:

- **Filtered By** panel - indicates the criteria you used for the search results.
- **Refine Search Results** filters - various filters are available to further refine your results, including Date Range, Supplier, Bid Strategy, Event Status, Response Status, Customer Name and Bid Intent. Select a value to see results meeting the desired filter criteria. Select the **[more]** hyperlink to see additional filter criteria where not all values are displayed.
- **Save Search** - For searches in the Supplier Network, you can save a search that you will execute on a repeated basis. For example, if you routinely search for events of a certain status, you could save that search and access it from your saved searches page instead of having to enter the criteria again. This option is not available for search results in a customer portal.
- **Start new search / edit search** - Select these buttons to either add to your current search criteria or start with a new search.

- **Search results** - Event search results show with basic information about the event. You can select an Event Number to see the event details.
  - **Results per page** - set the number of event results you want to see per page.
  - **Sort by** - the default sort is Release Date in Ascending order. Choose from other options to sort the results differently.
  - **Pagination** - select a page number or click the left/right arrows to move to the next/previous page.
  - **Event Information** - the following summary information is displayed for each event:
    - Customer Name - if you are in the Supplier Network viewing events and not in a specific customer portal, you will see the customer name indicated.
    - Event Number
    - Event Status
    - Event Title
    - Event Dates (in the user's time zone)
    - Supplier (applies if your organization manages multiple suppliers within your Supplier Network)
    - Action button to Respond or View Event

Viewing an Event within Search Results

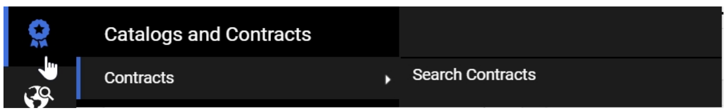
When you click to **View Event** or **Respond** to an event, you are taken to the event details. A banner across the top provides a hyperlink **Back to Search Results** to return to your results list. You may also **click through the result list**, or select from the **Event Number drop-down** to navigate to another event in the result set.

CUSTOMER CONTRACT VISIBILITY

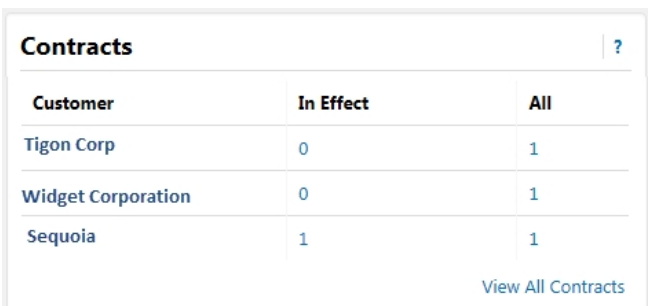
CONTRACT VISIBILITY

Customers with the **Contracts** solution can allow suppliers to see contract information in the Supplier Portal. This functionality allows suppliers to have access the contracts without having to contact the customer. Customers can choose to share the contract main document and attachments. A **View and Manage Contracts** permission is available in order to access contracts. Users with the Manage All Portal Activities or Manage Contracts role typically have this permission enabled.

Users with the appropriate permission have the **Contracts** menu option under **Catalogs and Contracts**:



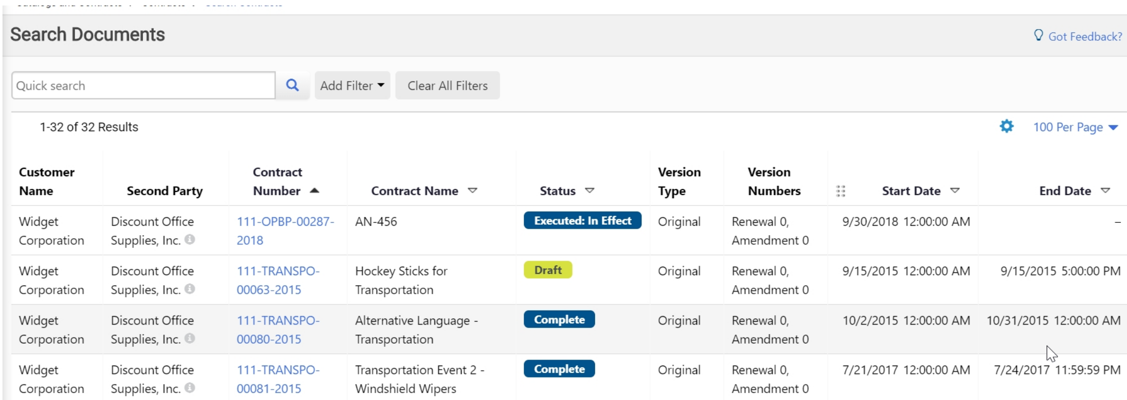
Contracts may also be accessed directly from the home page widget.



The Contracts widget will also display in a Customer Branded Portal if the customer has the appropriate license and has chosen to share contracts with the supplier.

Searching for Contracts

To navigate to a list of all contracts being shared with your organization from all customers, select **Catalogs and Contracts > Contracts > Search Contracts** in the Network Portal. The contracts list displays:



The following information is displayed, sorted by the Contract Number by default:

- Customer Name - The customer organization sharing the contract.
- Supplier - The supplier on the contract. This value will apply if you manage multiple suppliers in your portal.
- Contract Number - Select this value to navigate to the contract information in the Customer's Branded Portal.
- Contract Name - The customer's contract name.
- Status - The status of the contract. Customers can choose various statuses to share, so you may see a Draft status contract from one customer, but not from another.
- Version Type - Indicates if the contract is an original or renewal.
- Version Numbers - The version number for the contract.
- Start Date - The contract's start (effective) date.
- End Date - The contract's end (expiration) date.

Select the sort icon in a column to sort results in ascending or descending order based on the values in the column. Select the Configure Columns button ( ) to move, select or deselect columns for display.

You can select **Add Filter** to refine search results by:

- Customer Name - You can choose to see contracts from a specific customer. When selected, the list of customers with whom your organization has a relationship displays. Select one or more to see contracts for the selected customer(s).
- Start Date - Select from predefined date criteria, or enter your own.
- End Date - Select from predefined date criteria, or enter your own.
- Status - Select one or more status options.
- Supplier - If your Network Portal contains multiple suppliers, you can filter by one or more suppliers listed.

Click **Clear All Filters** to remove all filters from the list. You can also access the list by selecting the **View All Contracts** link in the Network Portal **Contracts** widget. This link navigates you to the **Search Contracts** results page.

SEARCHING FOR CONTRACTS IN A CUSTOMER BRANDED PORTAL

If you are in a Customer Branded Portal, you will still select **Catalogs and Contracts > Contracts > Search Contracts**. The list contains contracts shared by this customer organization. Selecting the **View All Contracts** link in the Customer Branded Portal **Contracts** widget will navigate you to the same Search Contracts page within the Customer Branded Portal. The filter and sort options are the same as in the Network Portal.

Viewing Contract Information

When you have selected a contract number from the Search Contracts page in either the Network Portal or a Customer Branded Portal, you are navigated to a Header page for the contract with basic information.

The **Header** page of the contract displays basic information such as the status, contract number and name, status, version, and any summary the customer has included.

The **Attachments** page displays attachments to the contract that the customer allows the supplier to view and download. The Attachment size and date uploaded is displayed, and you can sort on any of the columns. The Main Document for the contract is indicated with a crown icon ♛. Select an Attachment name to download and view the document or URL. You can also choose to **Download** (files) or **Go to Link** (URL's) from the **Actions** button dropdown for each attachment.

The **Communication Center** page allows suppliers and buyers to send and receive messages and attachments related to the contract. See **Contract Communication Center**, below for additional information.

Contract Communication Center

The **Communication Center** page allows suppliers and buyers to send and receive messages and attachments related to the contract. When a customer sends a message via the contract, it will display in the **Communication Center** for the contract in the Supplier Portal. Supplier users can choose to receive a notification when a new communication is received in addition to viewing the message in the Supplier Portal.

Communication can also be sent from the **Start Communications** option on the **Actions** dropdown for the contract.

Users with the **New Contract Communication** notification enabled will receive an email alert and/or in-app notification when a new message is received for a contract. Users must have the **View and Manage Contracts** permission (User Profile > Permission Settings > Supplier Portal: Contracts) to enable the notification and to access contract information. The message will display in the **Communication Center** regardless if the notification is enabled or not. You will also receive an email communication if the customer has your email address included in the communication, regardless of the notification setting

Step by Step

1. To send a new message, navigate to the contract and select the **Communication Center** page (Catalogs and Contracts > Contracts > Search Contracts).
    a. Click **Start Communication**. A **Send Communication** overlay displays.
    b. Enter a **Subject** for the message.
    c. Enter the **Body** of the message, up to 50,000 characters.
    d. If you would like to send the message as an email to other users, expand the **Recipients (Optional)** section.
        i. **User Recipients** are users within the supplier organization. Begin entering a user's name or email or select the search icon to search users. You can search for and select multiple users. Select the **X** next to a person's name to remove them from the list.
        ii. **Other Recipients** are people outside of your organization or without a login to the portal. Enter a **Name**, **Email** address, and click **Add Other Recipients** button. Continue until all desired recipients are listed. Click **Remove** to remove a recipient from the list.
    e. If you would like to associate an attachment to the message, expand the **Attachments (Optional)** section.
        i. Click the **Add Attachments** button. The **Add Attachments** overlay displays.
        ii. Click **Select files...** button to browse and select one or more documents. You can also drag and drop files into the **Select files...** area.
        iii. When finished, click **Done**. The overlay closes and the attachments are displayed.
        iv. Repeat to add other attachments, or click the **Remove** button to delete an attachment from the communication.
    f. When finished, click **Create** to send the communication to the customer organization and recipients.
2. To respond to a conversation, select a conversation in the **Communication Center**, and click **Add to Conversation**.
    a. Note that the **Subscribers** to the current conversation are listed. Click a name to view the email address.
    b. As indicated for a new message above, you can enter a **Subject** (overrides the current Subject for the conversation), and **Body** text.
    c. The **Recipients (Optional)** section is not available, as the recipients are locked in as part of the existing conversation.
    d. You can expand the **Attachments (Optional)** section to associate attachments as described above.

3. You can unsubscribe from receiving an email communication (in the case of the customer adding your email address manually to the communication) by selecting the **Unsubscribe** link in the email. You will be asked to confirm you are not a robot to unsubscribe. Customers have the option of adding a supplier user back to the conversation.

QUESTIONNAIRES

CUSTOMER QUESTIONNAIRES

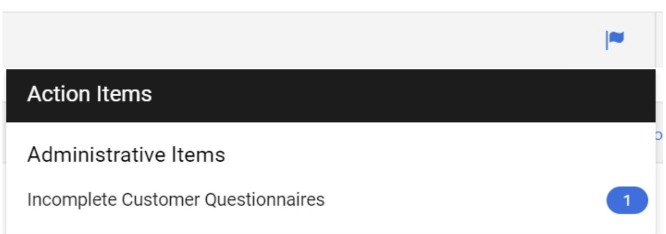
Customers with the JAGGAER Dynamic Qualification product may configure questionnaires to help automate their supplier vetting processes. Supplier users with the appropriate permissions will see a new **Questionnaire** widget available in a customer portal when the customer has assigned a Dynamic Qualification questionnaire to the supplier. Suppliers will follow the instructions provided by the customer for completion and submission of the questionnaire information.

Customer Questionnaires

A **Questionnaires** widget is available on the customer portal home page when the customer has assigned a questionnaire to a supplier, and the supplier user has the appropriate permissions Questionnaires are displayed according to their status:

- **Incomplete**: Questionnaires that have not yet been started or are in progress.
- **Complete**: Questionnaires that have been submitted to the customer. When selected, you may view the responses in read-only mode.
- **Archived**: Questionnaires that have been archived. When selected, you may view the responses in read-only mode.

When a customer assigns a questionnaire to the supplier, the **Action Items** in the Supplier Network and customer portal view will show a link for **Incomplete Customer Questionnaires** indicating there are questionnaires to be completed. Selecting the link will navigate the user to the appropriate questionnaire.



A user must have the **View Questionnaires** or **Edit Questionnaires** permission to see the Questionnaires widget in a customer portal. Only users with permission to edit may complete **Incomplete** questionnaires. The **Supplier Questions Sent From Customer** notification preference is enabled for users with the **Manage All Portal Activities** role to send an email and in-application notification when a customer assigns a questionnaire to the supplier. Users may edit the notification preference to receive only an email or in-application notification, or to not receive any notification.

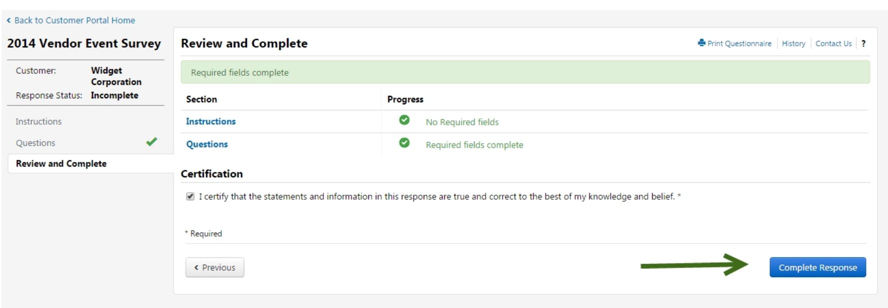
Responding to the Questionnaire

When selecting a questionnaire, the initial page will contain Instructions as provided by the customer. You may navigate the questionnaire by selecting the appropriate page on the left, or selecting the **Next** or **Save Progress** button on each page. The left navigation for the questionnaire indicates if you have completed the required information for the page with a green check. Each customer configures the individual questionnaires, so you may see multiple pages and groups of questions or just a single page of questions. Note that customers may also provide responses to the questionnaire.

When viewing the Questionnaire:

- You may navigate back to the portal home page by selecting **Back to Customer Portal Home** at any time.
- Questions that require a response in order to submit the questionnaire are indicated with a star(★).
- You may print the questionnaire by selecting the **Print Questionnaire** hyperlink.
- A **History** hyperlink provides an audit log of when the questionnaire was assigned and submitted, as well as changes made by the customer. You may filter history by date or the change action, and also export the audit log to a .csv file.
- A **Contact Us** hyperlink is available when viewing the questionnaire. When selected, the supplier user can see the customer's contact information if additional information about the questionnaire is needed.

Once all required questions have been completed, you may select to **Complete Response** from the **Review and Complete** page.



Customers may choose to re-open a questionnaire that has been submitted, which will assign it to the supplier as Incomplete so edits may be made.

Step by Step

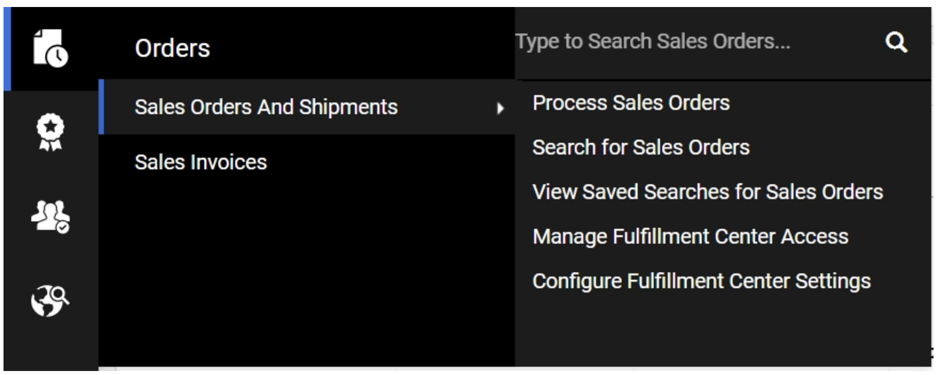
The goal of this task is to respond to a customer questionnaire. This task assumes there is a questionnaire available from a customer in Incomplete status. **Note**: All questionnaires are specifically configured by customers, so the number of questions and pages may vary with each questionnaire.

1. Navigate to an **Incomplete** Questionnaire.
    a. From the **Action Items** link on the Supplier Network home page or Customer Portal home page, select the link for **Incomplete Customer Questionnaires**.
    b. Go to the customer portal home page where you have a questionnaire assigned, and click on the appropriate questionnaire in the **Questionnaires** widget.
2. Review the **Instructions** provided by the customer, and click **Next**.
3. If desired, click **Print Questionnaire** to view a print version of the document.
4. Click the **Contact Us** link to see the customer contact for the questionnaire, if appropriate.
5. On the **Questions** page, respond to the questions. If multiple pages are presented, expand and select the appropriate page to begin your response. As you complete responses, click **Save Progress**. When finished with all questions on a page, select **Next**.
6. On the **Review and Complete** page, verify that all required fields are complete. If not, navigate to the appropriate page and complete required information.
7. Select the statement to **certify** your responses are true and correct, and click **Complete Response**.
8. You will see confirmation that your response was submitted. The questionnaire will show as **Complete** in the **Questionnaires** widget, and is now read-only.
9. When viewing a questionnaire, select the **History** link to see an audit log of when the questionnaire was assigned by the customer, submitted by the supplier, and if any additional changes were made by the customer. If desired, click **Export** to download a .csv file of the history file.

ORDERS AND INVOICES: SEARCH AND EXPORT

ORDERS AND INVOICES SEARCH

The **Orders** menu allows for management and searching of Sales Orders and Sales Invoices (Documents) in the Supplier Network. Through these menu options, users can locate and manage sales orders and sales invoices. A quick search option allows the user to enter a Sales Order or customer Purchase Order number, if known. Standard users can view their sales orders and invoices only - documents that they initiated. Some users may have permission to view additional orders and/or invoices for the supplier organization.



Important Note about Invoices: You may have been invited to view invoice status and payment details by one or more organizations. If this is the case, a sales invoice search will return all applicable invoices, including invoices created in the portal and invoices that are located in the organization's JAGGAER application. If no organizations are sharing invoice details with you, sales invoice search will only return invoices that were created in the Supplier Network Portal.

See **Search Sales Orders**, on page 160 and **Search Sales Invoices**, on page 170 for specific information and instructions on searches for each of the documents.

Managing Search Results

When you navigate to the **Orders** **> Sales Orders and Shipments > Search for Sales Orders** and **Orders** **> Sales Invoices > Search for Sales Invoices** pages, there are several options for managing the search results.

By default, all sales orders / sales invoices form the last 90 days are displayed by default when navigating to the page. You can select filters to return a different result set. Both pages contain the following features:

- **Quick Date Search** - The default value is the last 90 days, and you can select the dropdown to filter by other date criteria.
- **Perform a Quick Search** - You can perform a quick search of the documents by entering a value in the field and selecting the search icon . Matching documents are returned in the search results.
- Use the **Expand/Collapse** button - Beside the **Search [Document]** header, select the button to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.
- Add filters for Advanced Search by selecting from the **Add Filter** button next to the Quick Search box, or by selecting from the **Quick Filters** tab to the left of search results.

  Using the Add Filter button

  - Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays.
  - Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose Customer, an overlay displays where you can select the appropriate customer. **Important**: When there are many options, such as in the customer example, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
  - When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. To remove specific values from a filter, deselect the options within the filter. Click the to remove the filter.
  - Repeat the steps above to add additional filters.
  - Click the Search icon. The search results update to reflect the new filters.

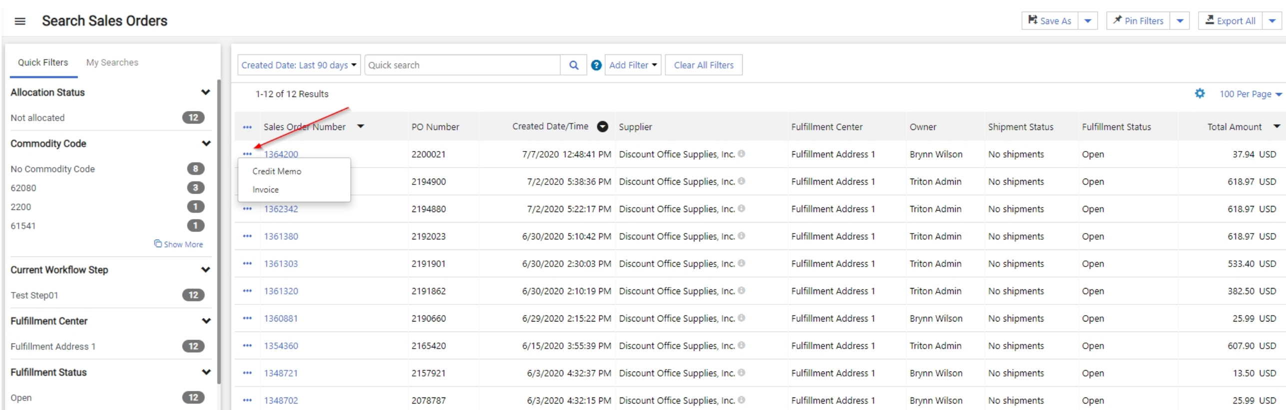
  Using the Quick Filters Tab

  - If necessary, click the Expand button and select options from the **Quick Filters** on the left. Click the **Show more...** link to see additional values for a filter, if present.
  - Search results are refined based on selection, and the selected filter option is listed above search results.
  - Click to remove the filter above search results, and/or continue to refine using the **Quick Filter** options.
- Link to **Manage Searches.**
- **Favorite** Searches list.
- **Export All** button allowing you to export all or selected rows. This dropdown also includes an option to navigate to the Manage Search Exports page.
- The ability to Sort by some columns. indicated by a triangle icon ( ).
- The ability to customize the information displayed. Select the Configure Columns button to choose what columns to display and in what order on the page.
- The **Pin Filters** button contains the options to **Pin Filters** and **Pin Columns**. This action is recommended when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.

TAKING ACTION IN SEARCH RESULTS

You can choose to take appropriate actions (per user permissions) for the document type using the action ellipses at the beginning of each search result.

1. Click the ellipses at the beginning of the row. The appropriate actions for the document will display as hover text.
2. Select the appropriate option and follow the instructions.

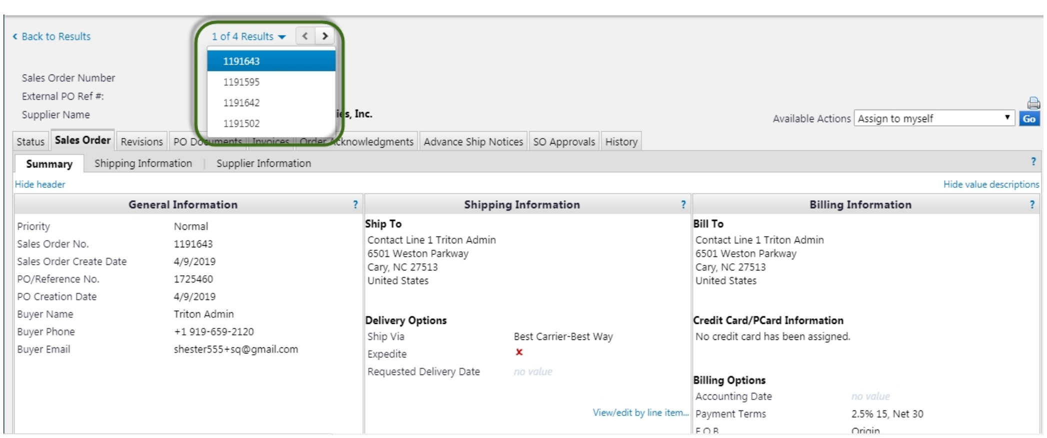


Exporting Search Results

You can choose to **Export All** search results or select multiple rows for the **Export-Selected Rows**. See **Export Search Results** for additional information.

VIEWING DOCUMENTS FROM SEARCH RESULTS

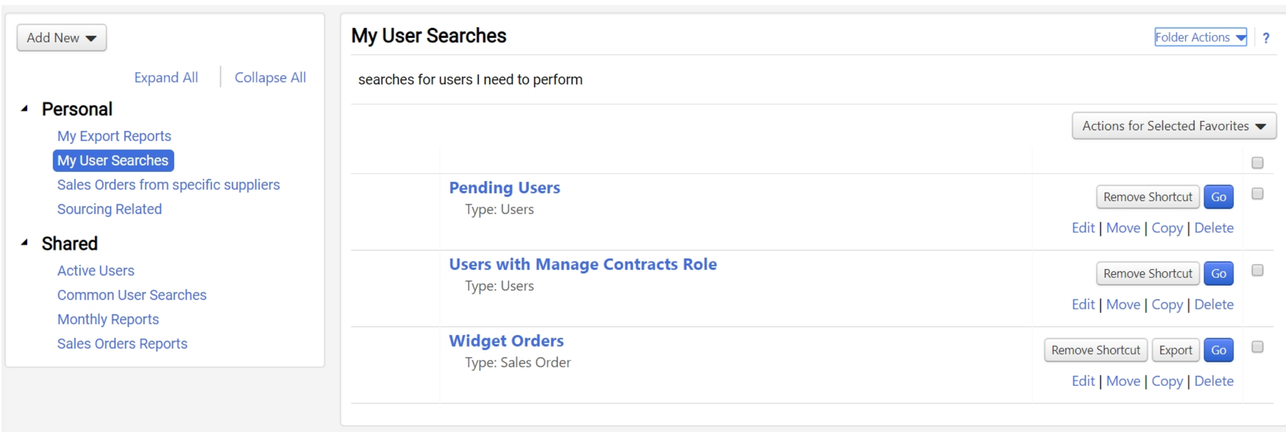
Select the Sales Order or Sales Invoice number from search results to view the document. Select **Back to Results** to return to the filtered list. You can click on the number of results listed at the top to choose a specific document number, or scroll through the list using the forward and back arrows.



Saving a Search

Saved searches are created from the search results page. When you choose to save a search you are essentially saving the search you executed to get to that results page. It is important to note that when you execute a saved search the dates will be relative, meaning the last 30 days would be from the date of report execution instead of the date that the report was saved.

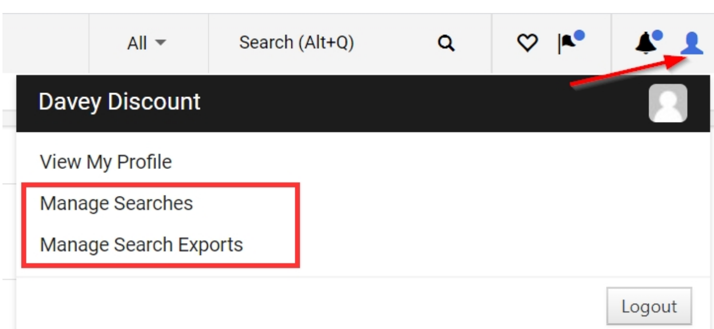
Saved searches are organized in folders. You may create your own personal folder(s) to store various searches. With the appropriate permission, you may create shared folders to save searches so that other portal users may access those searches.



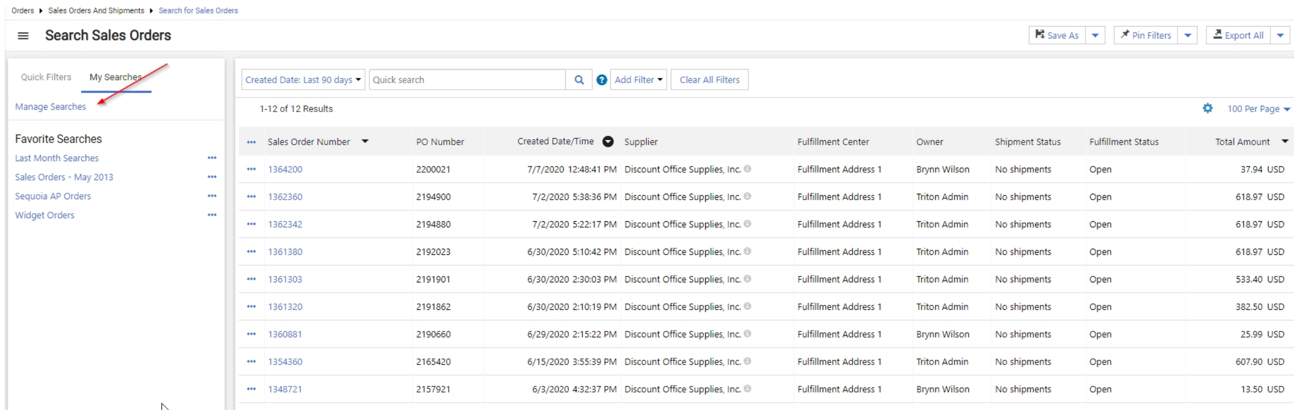
Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. When viewing saved search results, you can add filters to modify results, and save the existing search or save the updated criteria as a new saved search

Accessing Saved Searches

The **Manage Searches** page provides a **global** view of **all saved searches** for your organization (users, sales invoices, sales orders). It is available under the user profile dropdown option or from the Manage Searches link on the Sales Order and Sales Invoice search pages.



or



You can access the **saved searches for only Sales Orders** by navigating to **Orders > Sales Orders And Shipments > View Saved Searches for Sales Orders**.

You can access the **saved searches for only Sales Invoices** by navigating to **Orders > Sales Invoices > View Saved Searches for Sales Invoices**.

Create a Saved Search Folder

The purpose of this task is to demonstrate how to create a Saved Search folder from the **Manage Searches** page. Please note that you can also create a folder at the time you save a search. You will be presented with the option to create a new folder. If you choose to do so, you can follow the same steps as below.

Step by Step

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic.
2. Select the **Add New** button in the top left.
3. Select the type of folder you would like to create;
    a. **Top level personal folder** – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
    b. **Top level shared folder** – this will create a new top level folder that is accessible to your organization.
    c. **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.
4. Enter a name and description for the folder.
5. Select **Save**. A new folder will be added to the area you selected.

Create and Manage Saved Searches

Step by Step

Create a Saved Search

1. Perform a search using the desired search criteria.
2. Select **Save As** from the dropdown options at the top of the page.
3. Enter a **Nickname** for the search. This field is required.
4. Select a folder in which to save the search, or create a new folder.
5. Click **Save**. The search will be saved in the selected folder.

Edit saved search criteria and save or save as new

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic. Locate the appropriate search. Click the search name to view results.
2. When viewing the search results for the saved search, the saved search name appears at the top. Select additional criteria to further filter results. A (Modified) indication displays next to the saved search name.
3. Click the **Save Changes** drop-down button to see options:
    a. Select **Save Changes** if you want to save the existing saved search with the updated criteria. You will be asked to confirm your selection. Select **Yes** to save the search with the updated criteria. Select **No** to keep the existing search criteria.
    b. Select **Save As** to save the criteria as a new search. Follow the directions as indicated for **Create a New Saved Search**. The original saved search you selected will be unchanged.
    c. Select **Discard Changes** to remove additional filters applied since the last save.

Edit a Saved Search Name and Description

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic. Locate the appropriate search.
2. Select the **Edit** link for the search you want to edit.
3. Make the desired changes to the name and/or Description and select **Save**. The changes will be applied to the saved search.

4. To edit the name and description of multiple saved searches, select the checkboxes to the right of the appropriate searches then select the **Edit** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then change the information for all of the selected searches.

Move or Copy a Saved Search

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic.
2. To **move** a saved search from one folder to another:
   a. Select the **Move** hyperlink for the appropriate search.
   b. In the **Move Favorites** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.
   c. Select an existing **Destination Folder,** or select to **Add New**.
   d. Select **Save Changes**.
3. To **copy** a saved search to another folder, while leaving it in the current folder:
   a. Select the **Copy** link for the appropriate search.
   b. In the **Copy Favorites** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.
   c. Select an existing **Destination Folder,** or select to **Add New**.
   d. Select **Save Changes**.
4. To move or copy multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then select **Move** or **Copy** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then perform the action for all of the selected searches

Delete a Saved Search

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic.
2. Select the **Delete** link for the appropriate search. (Note that this is different than the Delete button available for folders)
3. An overlay displays. Click **Yes** to confirm you want to delete the search.
4. To delete multiple saved searches select the checkboxes to the right of the appropriate searches then select **Delete** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. All selected searches will be deleted.

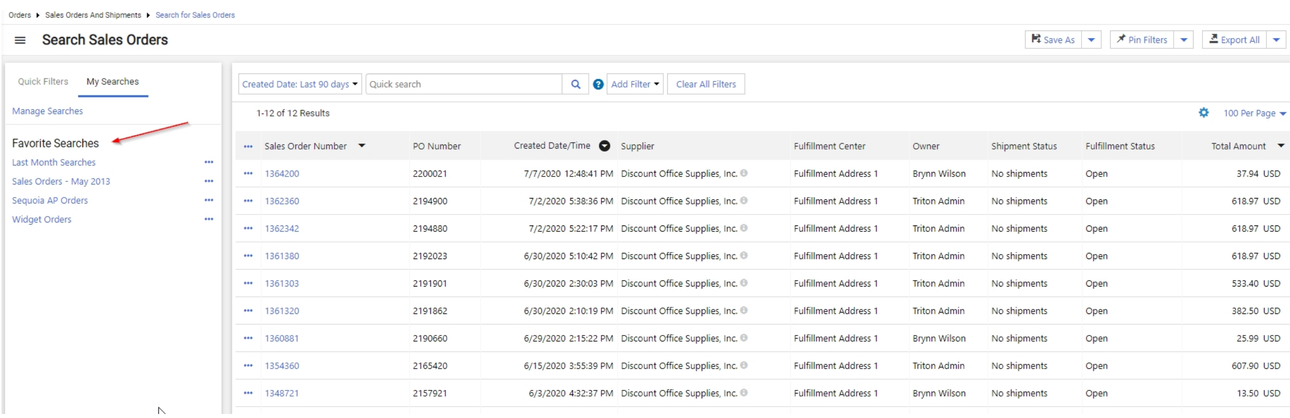
Execute a Saved Search

Select to see documents based on the criteria provided in a saved search.

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic. Locate the search you would like to execute.
2. Select the Saved Search name or the **Go** button.
3. Your search will be executed and you can view results based on the criteria in the saved search.

Saved Search Favorites

You can select to **Add Shortcut** for a saved search so it will show as a **Favorite** on a search results page.



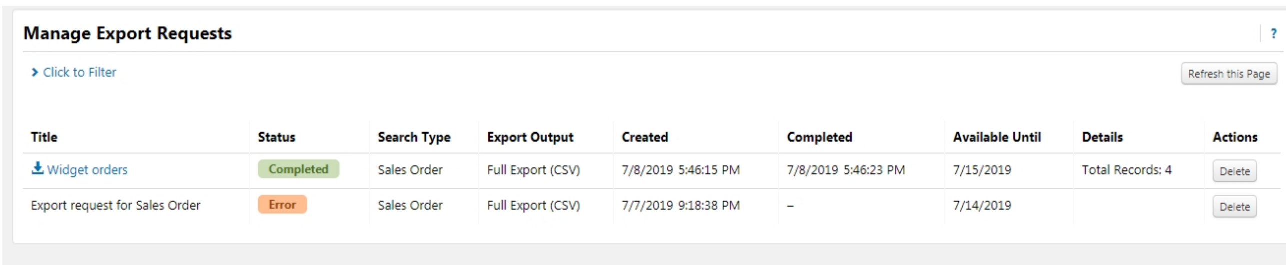
Step by Step

1. Navigate to **Manage Searches** or a **Saved Searches** page by either of the methods described in Accessing Saved Searches earlier in this topic, locate the search you would like to make a Favorite.
2. Select the **Add Shortcut** button. This will add a shortcut as a Favorite to run from the main search page.
3. Navigate to **Orders > Sales Orders And Shipments > View Saved Searches for Sales Orders** or to **Orders > Sales Invoices > View Saved Searches for Sales Invoices** and notice the **Favorite Searches** listed on the left side.
4. To run a saved search from the shortcut, select the saved search link name.
5. To run an export of a saved search, select the **export** link.
6. To remove the saved search as a favorite (shortcut):
   a. From the search results page, select the action icon ( ) and click **Remove Shortcut**.
   b. From the Saved Searches or Manage Searches page, click **Remove Shortcut** for the appropriate saved search.

Export Search Results

When you perform a sales order or sales invoice search you may want to export the results for further reporting and analysis. You can choose to export the entire list of search results or only selected rows. You can also schedule recurring instances of certain export report types.

When you export a search, a .zip archive is created for download that contains one or more Excel CSV file (s). The file is available on the **Manage Search Exports** page from your user profile, or by selecting **Manage Search Exports** from the Export dropdown on the search results page. The file is available until the Expiration Date designated for the export.



Manage Export Requests

› Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Widget orders	Completed	Sales Order	Full Export (CSV)	7/8/2019 5:46:15 PM	7/8/2019 5:46:23 PM	7/15/2019	Total Records: 4	Delete
Export request for Sales Order	Error	Sales Order	Full Export (CSV)	7/7/2019 9:18:38 PM	–	7/14/2019		Delete

The list of export files includes:

- **Title** – the title assigned when the export was created. Select to open or download.
- **Status** – indicates the current status of the export. Click **Refresh this Page** to see updated status.
- **Search Type** - indicates if the export is Sales Order or Sales Invoice.
- **Requester** – the user name of the requester (shown only if Show Company Exports was selected). Select the user's name to see their email address.
- **Export Output** – the type of export (Screen, Transaction, Full).
- **Created** – the date/time the export was requested.
- **Completed** - the date/time the export was completed.
- **Available Until** – the date the export will expire.
- **Details** – indicates how many records are contained in the file.
- **Actions** – a **Delete** button is available for completed exports. When selected, the export file is removed from the list and no longer available.

REQUEST EXPORT TEMPLATE TYPES

- **Screen Exports**: Screen exports will export the search results exactly as they appear on the results screen with no additional data.
- **Transaction Exports**: Transaction exports will export all information available about the transaction associated with each document.
- **Full Exports**: Full exports will export all information available about the transaction associated with each document. Full exports also include document history such as approvals, comments and more. **Note**:This report is available for Sales Order exports, and is not available for Sales Invoice exports.

Exporting from Search Results

An **Export All** button is available at the top of search results. You can choose to export all search results displayed or only selected rows.

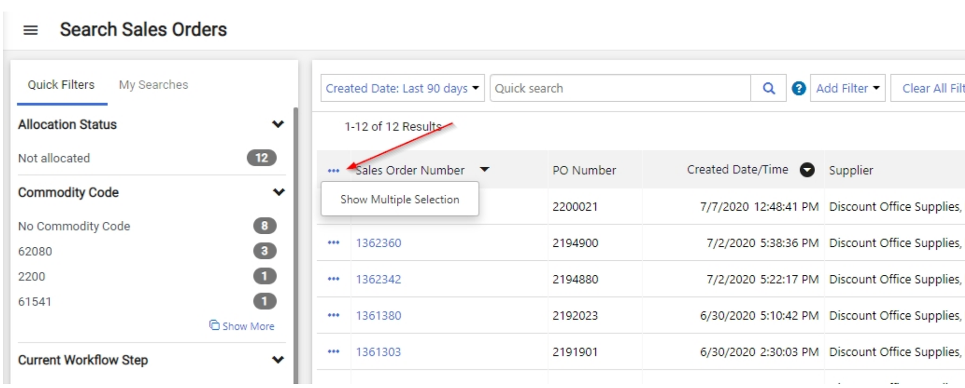
Step by Step

Export All Results

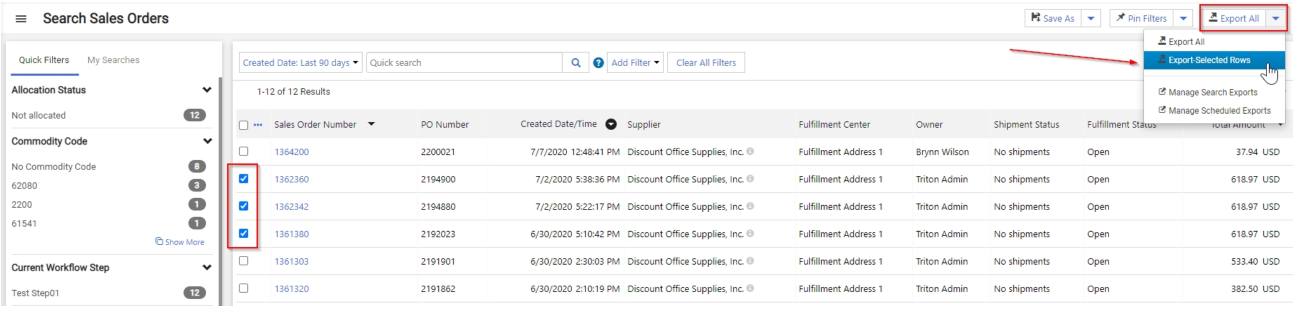
1. Perform a search for Sales Orders or Sales Invoices. (See **Search Sales Orders**, on page 160 or **Search Sales Invoices**, on page 170 for additional information)
2. From search results, click the **Export All** button. Choose **Export All** to include all rows in the result set in the export file. An overlay displays.
3. Enter a **Title** for the export, up to 100 characters. A default Title is provided.
4. Select a **Type** of export - Screen Layout, Transaction, or Full. (Note that the Full Export is not available for Sales Invoice searches).
5. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

Export-Selected Rows

1. Perform a search for Sales Orders or Sales Invoices. (See **Search Sales Orders**, on page 160 or **Search Sales Invoices**, on page 170 for additional information)
2. For **Sales Orders**, click the ellipses at the beginning of the header row. For **Sales Invoices**, the multi-select check boxes are displayed by default; skip to step 4 below.



3. Click **Show Multiple Selection**. Check boxes are now displayed in the header row and for each row.
4. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
5. Once selections are made, click the **Export All** dropdown, and choose **Export-Selected Rows**.



6. Enter a **Title** for the export, up to 100 characters. A default Title is provided.
7. Select a **Type** of export - Screen Layout, Transaction, or Full. (Note that the Full Export is not available for Sales Invoice searches).
8. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

Exporting Results from a Saved Search

When you export a saved search, dates will be relative to the time you request the export vs. the date you saved the search. For example, if you select to export a saved search that searches for the last 30 days, it will return results dated 30 days from the date of the export.

Step by Step

This task assumes you have a saved search. See **Saving a Search**, on page 145 for additional information about saving searches.

1. Navigate to **Manage Searches** page (**User Profile > Manage Searches** or select the **Manage Searches** link on the Sales Order or Sales Invoice search page) and locate the search you would like to export.
2. Select the **Export** button.
3. Enter a **Title** for the export. You may also enter a Description, but one is not required.
4. Select a **Type** of export - Screen Layout, Transaction, or Full. (Note that the Full Export is not available for Sales Invoice searches).
5. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

Downloading Search Exports

Step by Step

The purpose of this task is to locate and download document search exports.

1. Navigate to **Manage Search Exports** page (**User Profile > Manage Search Exports** or select the **Manage Search Exports** option from the Export button dropdown on the Sales Order or Sales Invoice search page).
2. If there are several exports you may want to filter them to locate the export you want to download. Select **Click to filter** link.
    a. **Search Type** – Select to filter exports by Sales Invoice or Sales Order exports. The default is All.
    b. **Status** - Select to filter exports by status. The default is All.
    c. **Show Company Exports** – By default, only your requested exports are shown. Select Yes to see all exports requested by all users in your organization. If you have permission only to view your own exports, this check box will not be available.
3. Click the **Title** for the export you want to download or open. Select to **Open** or **Save** the file.
4. When you have downloaded the file, you can choose to remove it from the exports. Select the **Delete** button under the Action column for the appropriate export file.

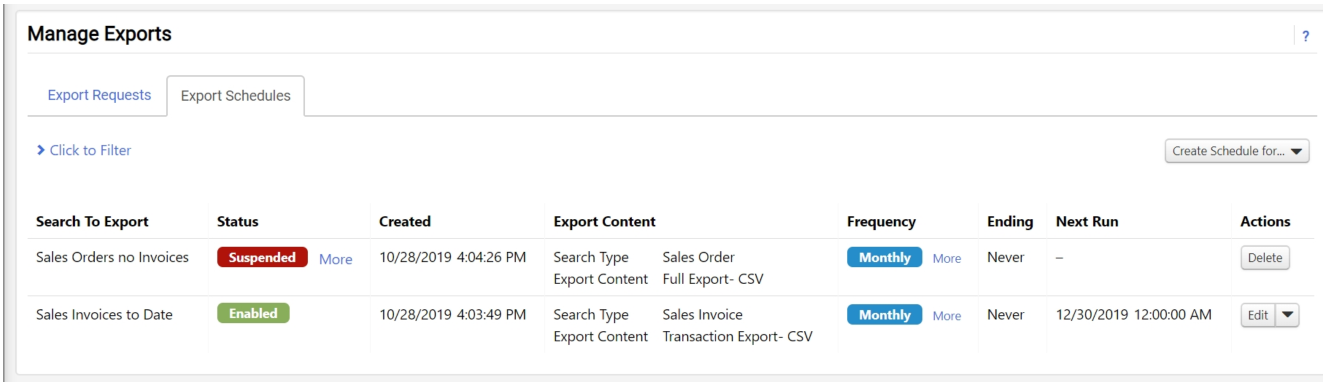
Scheduled Exports

Some document search exports can be scheduled to recur on a regular basis. Saved Sales Order and Sales Invoice searches in your own personal or shared company folders can be scheduled to run on a daily, weekly or monthly basis. Weekly exports can be configured to occur one or more times each week or every "x" weeks. Monthly exports can be configured to occur based on a week and day of the month, or a specific date each month. You can choose to run an export a specific number of times, through a specific date, or to continue until you disable it.

Navigate to the Export Schedules page by:

- Select the **Manage Search Exports** option from your user profile dropdown, and click the **Export Schedules** tab; or
- From the **Search for Sales Orders** page (Orders > Sales Orders and Shipments) or **Search for Sales Invoices** page (Orders >Sales Invoices), select **Manage Scheduled Exports** from the **Export** dropdown selections.

The **Export Schedules** page lists all exports scheduled by the user by default. Select **Click to Filter** to search for a type of export or to show company exports scheduled by other users.



The list of exports includes:

- **Search to export** - The name of the export search.
- **Status of the scheduled export** - Enabled or disabled.
- **Created** - The date the scheduled export was created.
- **Export Content** - The type of export and format of the export file (screen layout, full export or transaction export)
- **Frequency** - Monthly, Daily or Weekly. Select the More link to see hover text with more details.
- **Ending** - When the scheduled export ends.
- **Next Run** - The next date and time the scheduled export will run.
- **Actions** dropdown - You can select to Edit the scheduled export, Delete it from the list, or Disable it. Disabling the export will allow it to remain in the list but not run until you select to Enable it again.

Step by Step

1. Navigate to the **Export Schedules** tab by:
   a. Select the **Manage Search Exports** option from your user profile dropdown, and click the **Export Schedules** tab.
   b. From the **Search for Sales Orders** page (**Orders > Sales Orders and Shipments**) or **Search for Sales Invoices** page (**Orders >Sales Invoices**), select **Manage Scheduled Exports** from the **Export All** dropdown selections.
2. To create a new scheduled export, click the **Create Schedule for...** dropdown button:
   - Select Sales Invoice or Sales Order for the type of scheduled export. A Schedule Export overlay displays to select the Saved Search and provide additional details about the export.
   - The Search Type is the type of search you selected and cannot be changed.
   - Search to Export - This is the saved search you want to schedule to run on a recurring basis.

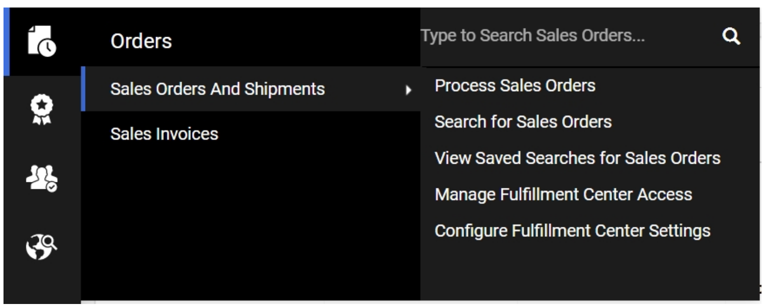
- Type - Select the type of export: Screen Layout, Transaction, or Full. All options are not available for all types of exports.
- Format - This field is read-only and will be CSV or Excel, depending on the type of export.
- Starts On - Select the date you want the scheduled export to start.
- Frequency - Select how often you want the scheduled export to run: Monthly, Weekly or Daily. Additional options display based on your selection:
  - Daily - Select when the scheduled export should end: after a specific number of occurrences, by a specific date, or if the export does not end (No End Date).
  - Weekly - Select the week frequency the export should occur and on what day(s). You will also select when you want the export to stop based on number of occurrences, a specific date, or not at all.
  - Monthly - Select the month frequency the export should occur. Select if the monthly export is:
    - Based on a week and day of the month - you will select which week and which day of the month the export should occur.
    - By day of the month - you will select a specific date of the month for the export to run. Note that the selection is from the 1st to the 28th, or the Last day of a month.
    - Export Until - Select when the export should be disabled and not run again: after a specific number of occurrences, by a specific date, or not at all (No End Date)

SALES ORDERS

SALES ORDERS IN THE JAGGAER NETWORK

In the JAGGAER ONE Supplier Network, a supplier can access purchase order information from JAGGAER customers. This information can be used for review purposes or can be used as an actual purchase order delivery method.

You can access sales orders for processing, viewing and reporting from the Orders > Sales Orders and Shipments menu. You can also manage Fulfillment Center access and configure Fulfillment Center settings.

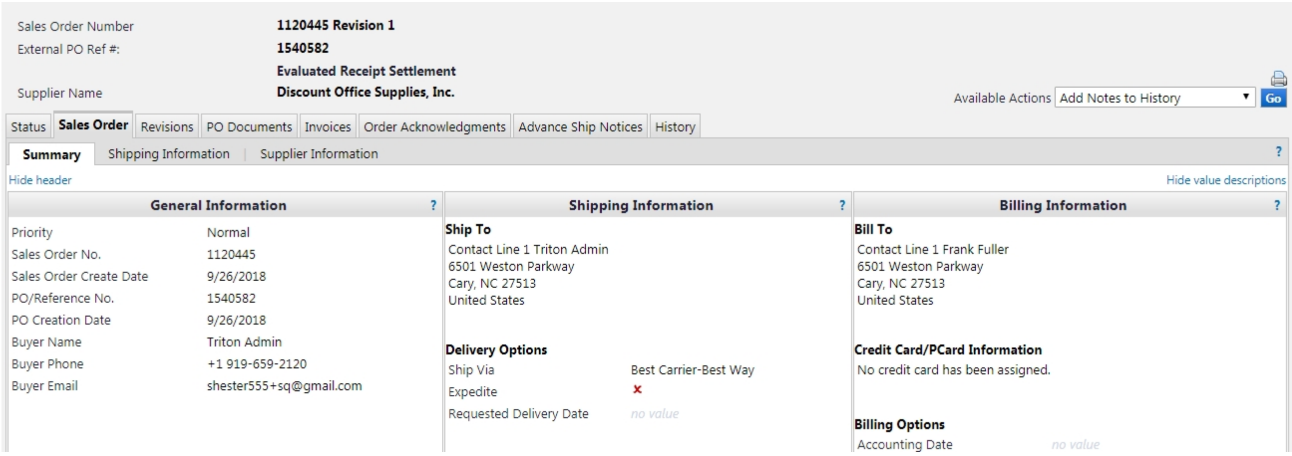


The following options are available, depending on the organization's configuration and user permissions:

- **Process Sales Orders** - This option allows the user to review and fulfill sales orders.
- **Search for Sales Orders** - Navigates the user to the Sales Order search page with advanced search options.
- **View Saved Searches for Sales Orders** - Navigates the user to the **Manage Searches** page in a filtered view for Sales Orders saved searches only.
- **Manage Fulfillment Center Access** - Allows the user to manage what users have access to the supplier organization's Fulfillment Centers.
- **Configure Fulfillment Center Settings** - Allows the user to identify the Sales Order Numbering Scheme for each Fulfillment Center.

Sales Orders

The Sales Orders page allows end users to view purchase orders from customers who utilize Order Manager (JAGGAER application) to place orders. The Sales Orders page allows for processing and/or viewing Sales Orders, depending on User Permissions. Permissions are usually available via a role assigned to a user, but may also be assigned explicitly to a user.



Information you will see on the Sales Order may vary with the customer organization. Information can include:

- **General Information** - Basic information about the Purchase Order from the customer, including the assigned Sales Order number and created date, the associated Purchase Order number and created date, and the buyer user's information.
- **Shipping Information** - The shipping address for the buyer, and delivery information. A **Requested Delivery Date** is displayed based on the **Delivery Lead Time** provided for the item. For hosted catalog items, **Delivery Lead Time** is an optional attribute that suppliers provide with hosted catalog content, and is visible to customers when viewing the item in shopping search results or on a purchase order. **Delivery Lead Time** can also be added to contract non-catalog items that are managed by the customer organization. The **Requested Delivery Date** value is automatically populated based on the **Delivery Lead Time** value for the item, if provided.
- **Billing Information** - The billing address for the buyer, payment information, and Payment Terms.
- **Distribution Information** - If your organization uses Fulfillment Workflow, you can see the status of the Sales Order. Also included here are order instructions from the buyer org, as well as Supplier Terms and Conditions.
- **Supplier Information -** If you your organization has contract relationships through the JAGGAER ONE solution with the customer, you may see Contract information here. The buyer can also include a note and attachments in this section. PO Clauses from the buyer are also included in this section, of applicable.
- **Line Item Details** - This section contains the specific line items from the buyer's Purchase Order. Basic information about the item is displayed. The buyer can also include a note and attachments specifically for the item.

Revisions

When viewing a Sales Order in the Supplier Portal, the **Revisions** tab records and displays the revision information when a customer makes a change to the corresponding Purchase Order. The changes between revisions are noted in the history of the sales orders.

- The first version of the sales order is logged as **original version** and will always display on the Revisions tab, even if no revisions have been made to the document.
- Each revision is listed, along with the following information:
  - **Revision No.** - The number of the revision. **Note**: Revisions are listed from latest revision to earliest revision.
  - **Revision Name** - If the revision was made directly to the sales order, this field will display the revision name entered in the Name field. If the revision was the result of a PO revision, the name will be **Modified by PO revision**. Clicking the **view...** button in this field allows you to view the sales order summary in a separate window.
  - **Revised By** - If the revision was made directly to the sales order, this field will display the name of the user who *finalized* the revision. If the revision was the result of a PO revision, the field displays **System**.
- When edits are saved on a sales order, a new message displays, warning the user that changes have been made since the last revision.
- Revision information is recorded on the **History** tab of the sales order.

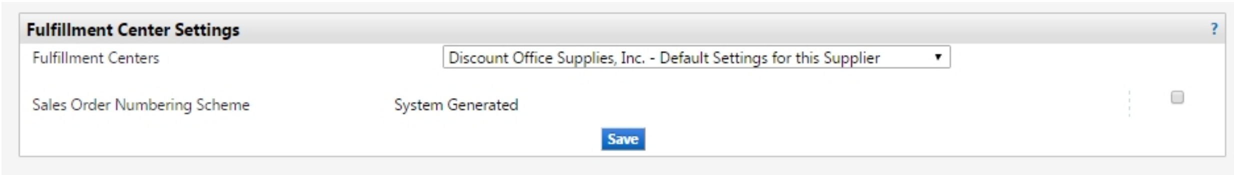
A Notification Preference for **Sales Order Revised by Purchase Order** alerts the user when a sales order is revised from a purchase order (User Profile > Notification Preferences > Supplies Manager). This preference is enabled for email and in-app notifications by default for all users, but can be disabled in the user profile or at the role level by an administrator.

SALES ORDERS AND FULFILLMENT CENTERS

Most suppliers will have a single Fulfillment Center address associated with their supplier organization. However, some suppliers may have multiple Fulfillment Addresses to which orders may be routed. Users may be configured to have access to Sales Orders for all or specific Fulfillment Centers.

A default Fulfillment Center is assigned to your Supplier ID upon creation of your initial Fulfillment Center address. Customers may choose to add Fulfillment Centers for your Supplier ID in their own application. You will see the customer associated with a Fulfillment Center displayed at the beginning of the Fulfillment Center name. For example, Triton.Fulfillment Address 2 – CA is a Fulfillment Center for the Triton customer organization.

You may control your Sales Order numbering scheme by Fulfillment Center, selecting to use a system generated number or using the customer's Purchase Order number as the Sales Order number in your portal. These settings are configured in the **Orders** menu under **Sales Orders & Shipments > Configure Fulfillment Center Settings.**

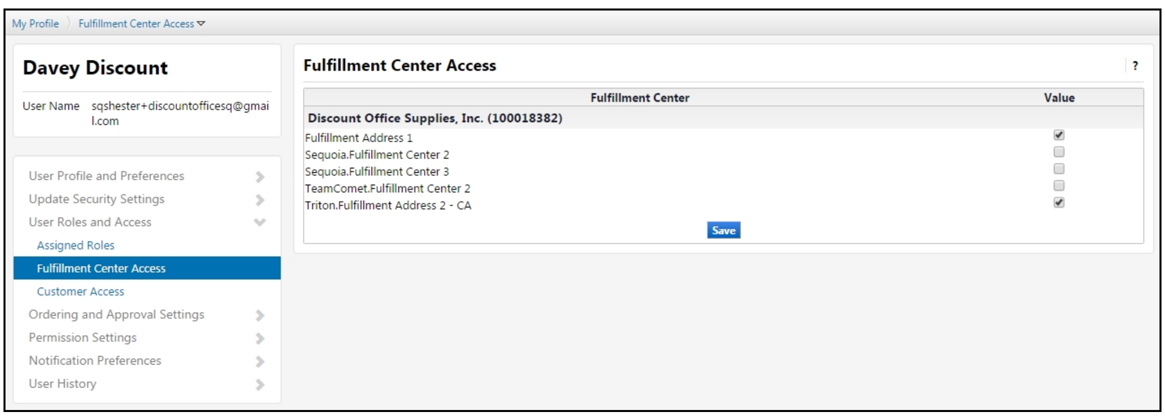


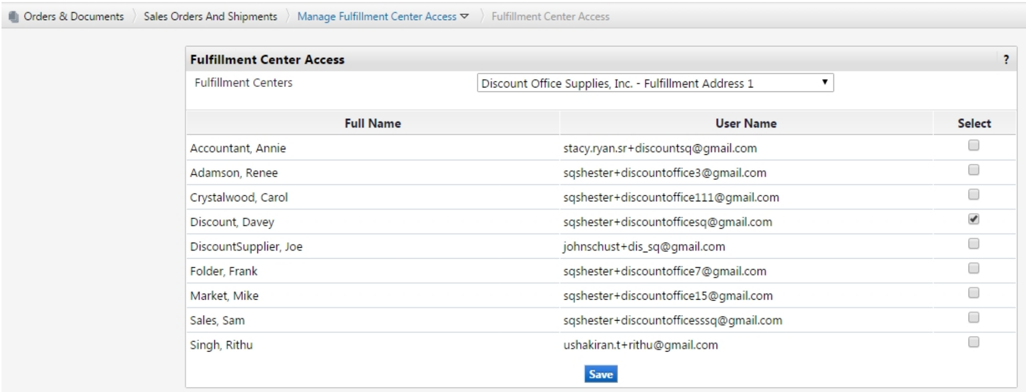
SALES ORDER ROLES AND PERMISSIONS

Two permissions control viewing Sales Orders in the portal.

- **View All Sales Orders** permission is enabled for **Manage All Portal Activities** and **Support Customer Questions** roles by default. Users with this permission will have the ability to view all sales orders in the portal, regardless of which Fulfillment Center is associated.
- **View Sales Orders** permission is enabled for the **Manage Orders / Invoices** role by default. Users with this permission (and without the View All Sales Order permission) will have the ability to see Sales Orders only from those Fulfillment Centers to which the user is assigned.

Fulfillment Center access is assigned either in the **User Profile** under **User Roles and Access>Fulfillment Center Access**, or in the **Orders** menu under **Sales Orders & Shipments > Manage Fulfillment Center Access.** In order to make these assignments, a user must have the **Edit Fulfillment Center Access** permission.





See User management for more information on user roles and permissions.

Search Sales Orders

You can search for Sales Orders from the **Orders > Sales Orders and Shipments** menu navigation. If the sales order or customer purchase order number is known, you can enter it in to the search box within the Orders navigation fly-out. If the sales order or purchase order number is not known, or you would like to view several sales orders meeting specific criteria, select **Search for Sales Orders** for additional search options. See **Managing Search Results**, on page 142 for more information about managing search results.

By default, all sales orders from the last 90 days are displayed. Additional search options include:

- **Quick Date Search** - The default value is the last 90 days, and you can select the dropdown to filter by other date criteria.
- **Perform a Quick Search** - You can perform a quick search of the documents by entering a value in the field and selecting the search icon. Matching documents are returned in the search results.
- Use the **Expand/Collapse** button - Beside the **Search [Document]** header, select the button to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.
- Add filters for Advanced Search by selecting from the **Add Filter** button next to the Quick Search box, or by selecting from the **Quick Filters** tab to the left of search results.

Using the Add Filter button

- Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays.
- Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose Customer, an overlay displays where you can select the appropriate customer. **Important**: When there are many options, such as in the customer example, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.

- When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. To remove specific values from a filter, deselect the options within the filter. Click the ⊗ to remove the filter.
- Repeat the steps above to add additional filters.
- Click the Search icon. The search results update to reflect the new filters.

Using the Quick Filters Tab

- If necessary, click the Expand button ☰ and select options from the **Quick Filters** on the left. Click the **Show more...** link to see additional values for a filter, if present.
- Search results are refined based on selection, and the selected filter option is listed above search results.
- Click to remove the filter above search results, and/or continue to refine using the **Quick Filter** options.

For additional information about features on the Sales Order Search page, see**Orders and Invoices Search**, on page 142.

Sales Order Filter Options

Identifiers

- **PO Number(s)** - Enter the customer purchase order number. To enter multiple purchase order numbers, separate with commas.
- **Sales Invoice Number** - Enter the sales invoice number. To enter multiple sales invoice numbers, separate with commas.
- **Sales Order Number(s)** - Enter the sales order number. To enter multiple sales order numbers, separate with commas.

Dates

- **Approved Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Completed Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Last Modified** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **PO Create Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.

General Information

- **Approved By** - Select the Current User and/or one or more users from the list. You can also begin to enter a name and the system will suggest users for you to select. Deselect the name to remove it from the filtered list.

- **Current Workflow Step** - Select from the listed steps, begin entering to select or click **Begin typing or click here to search** to find sales orders in specific workflow steps. Deselect a workflow step to remove it from the filtered list.
- **Customer(s)** - A list of customers is displayed for easy selection, or you can begin entering a customer name in the filter and the system will suggest customers for selection. Deselect a name to remove it from the filtered list.
- **External User** - Enter the external user. To enter multiple external users, separate with commas.
- **Fulfillment Center** - If your organization has multiple fulfillment centers, you can search by one or more values. Select from the list of available Fulfillment Centers. Deselect a name to remove it from the filtered list.
- **Owner** - The name of the sales order owner.
  - Current User - Selecting this option will include sales orders where only the logged in user is the owner.
  - Select from displayed users - The system selects most likely options from which you can select one or more.
  - Search - Enter a user's name to see suggested selections. You can also use additional search options by selecting **Begin typing or click here to search**. Within the search overlay, you can click on **More Options** to search by first name, last name, email or username of the document participant. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.
- **Participant** - A document participant is anyone who has taken any action on the document, including a person who has simply made notes.
  - Current User - Selecting this option will include sales orders where only the logged in user is the participant.
  - Select from displayed users - The system selects most likely options from which you can select one or more.
  - Search - Enter a user's name to see suggested selections. You can also use additional search options by selecting **Begin typing or click here to search**. Within the search overlay, you can click on **More Options** to search by first name, last name, email or username of the document participant. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.
- **Pending Approver** - Search by the current Pending Approver for the document.
- **Supplier** - If you have more than one supplier assigned to your portal, you can select a supplier name to search for sales orders associated with that supplier. Deselect to remove the supplier from the list.
- **Total Amount** - Use this field to search for sales orders based on the total dollar amount. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between) then enter a dollar amount.

Item Details

- **CAS Number** - Search by an item's CAS Number (assigned to chemical items).
- **Catalog Number (SKU)** - Enter a catalog number to search for sales orders with a specific item. Note that you should omit special characters from the catalog number.

- **Commodity Code** - If you are searching for sales orders that contain specific commodity codes, enter the codes. To enter multiple commodity codes, separate with commas. Deselect a code to remove it from the filtered list.
- **Manufacturer Name** - Search for orders with items from a specific manufacturer(s).
- **Product Category** - Select from the listed categories, begin entering to select or click **Begin typing or click here to search** to find sales orders with products associated with those categories. Deselect a category to remove it from the filtered list
- **Product Description** - Enter a description or keywords to search for sales orders with items including the search terms.
- **Product Flags** - Select one or more flags to search for sales orders with products that have any of the flags associated to an item.

Properties

- **Allocation Status** - Select one or more allocation status options.
- **Fulfillment Status** - Select to search sales orders that have been fulfilled or not (open/closed).
- **Invoice Status** - Select one or more invoice status options to identify sales orders with an associated invoice in any of the selected statuses.
- **Order Delivery** - Select an option to identify sales orders delivered via the portal or not.
- **Sales Order Status** - Select to filter sales order based on if the sales order:
  - Has Trade In items
  - Has backordered lines
  - Has cancelled Lines
  - Has over shipped lines
- **Status** - The Workflow Status. Select to search for sales orders in Pending or Completed status.

Step by Step

The purpose of this task is to perform a sales order search.

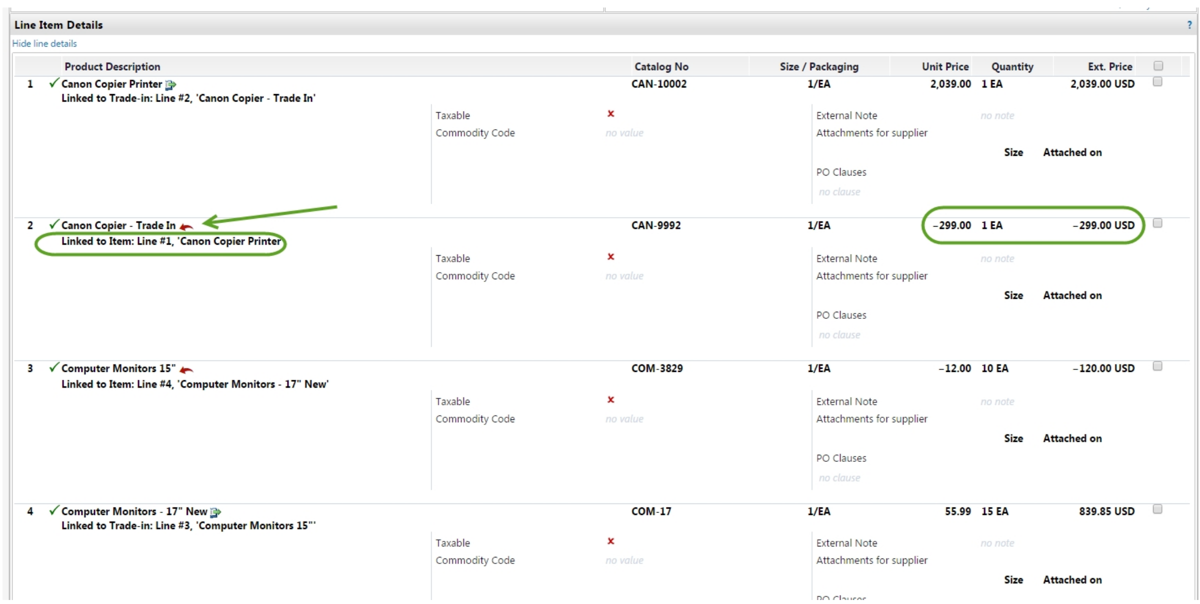
1. Navigate to **Orders** **> Sales Orders and Shipments > Search Sales Orders**.
2. Sales orders for the last 90 days display.
3. Expand the **Created Date** dropdown filter to select a different date range.
4. Use the **Quick search** to search for sales orders by number, PO number, customer, etc.
5. Click **Add Filter** and choose filter options. As filters are selected, additional options display. You can also click the **Expand/Collapse** button to view and filter from the **Quick Filters** panel on the left.
6. To remove a filter, click the next to the filter or deselect it in the **Quick Filters** list.
7. To save the search for repeat use, select **Save As**. See **Saving a Search**, on page 145 for additional information.

8. To view the search results in a file, select **Export Search**. See **Export Search Results**, on page 150 for information about exporting search results.
9. Click **Clear All Filters** to return to the default view.

Trade-In Items on Sales Orders

Many customers may need to make purchases for equipment when there is a used piece of equipment they can trade in to offset the cost of a new purchase. Customers can add **Trade-In Items** to a purchase order for such a transaction. This reduces the need for manual communication between buyer and supplier when such transactions are needed.

Trade-in items have a negative value and are linked to another item on the sales order in order to realize a discount on the linked item. Trade-in items are indicated with a red arrow icon on the sales order.



ABOUT TRADE-IN ITEMS

- A Trade-In item must always be linked to another item on the same sales order. When viewing the Sales Order in the portal, the linked item information is referenced for each applicable line item.
- As a supplier, you cannot add a trade-in item to a sales order or sales invoice. However, you can choose to remove a trade-in item from a sales order or a sales invoice in the same way that any line can be removed from an invoice. If you have the ability to substitute items on an invoice, you can also enter substitute item information for the trade-in item.
- You can search for Sales Orders and Invoices that have trade-in items by using the **Advanced Search** tools.

- In reports, the link between items is used to account for the trade-ins as a reduction on the original amount for the line/document.
- You may need to communicate with a buyer for any integrations that send sales order or invoice data. The customer can choose to include negative monetary values, only positive monetary values, or no value for trade-in items.
- See Trade-In Items on Sales Invoices for additional information.

Sales Order Delivery

All purchase orders from Order Manager customers show as Sales Orders in the portal. In addition, suppliers may be configured to have sales orders from some or all customers delivered to their portal as their Default method of delivery. This is an additional delivery option to Fax, Email, or cXML methods. **This option is not available to suppliers or customers by default**. Order delivery must be enabled by JAGGAER in the supplier portal and for specific buyer connections.

The supplier must have specific internal processes in place in order to receive orders through the portal, as with any other method:

- Purchase Orders can be delivered to the supplier's portal for entry into the supplier's fulfillment system (from Customers with Order Manager)
- Supplier assigns portal users to the delivery queue to view and process delivered orders. A user must have the **Close/Complete Sales Order** permission in order to process sales orders. The permission to **View Sensitive Credit Card Details** may also be required in order to process payment information.
- A user with responsibility for processing Sales Orders may want to enable the notification preference for when a Sales Order is received: **Sales Order received from a customer**.

Sales Orders delivered to the portal show on the **Process Sales Order** page in the **Orders** **> Sales Orders and Shipments** menu. You may access the Sales Order to process the information according to the supplier's internal fulfillment processes.

Step by Step

The purpose of this task is to process a Sales Order delivered to the Supplier Network Portal. The option to process sales orders as a means of order fulfillment in your Supplier Network Portal must be configured by JAGGAER.

1. Navigate to **Process Sales Orders** from the **Orders > Sales Orders and Shipments** menu.
2. A list of Sales Orders delivered to the portal display.
3. Select a Sales Order number to view the Sales Order.
4. You may navigate through the result set by selecting the next result or selecting a specific Sales Order Number from the dropdown at the top right of the current sales order view.

5. Process the Sales order information according to your organization policies.
6. Select from the dropdown menu to **Close Sales Order**. You may choose to **Add a Note** as to the reason for closing the order.

Order Acknowledgments and Advance Shipping Notices

Order Acknowledgments and Advance Shipping Notices can be sent from supplier to buyer for orders processed electronically. If allowed by the customer, suppliers also have the ability to send Order Acknowledgments and Advance Shipping Notices through the Supplier Network Portal.

Supplier users with the appropriate permissions can review pending sales orders and create the following from within the Network Portal:

- **Order Acknowledgments** are sent to confirm that you received an order and indicate if items on the order have been accepted, back-ordered, or rejected. You can also indicate the quantity of items, an estimated shipping date, and enter comments about the order.

- **Advance Shipping Notices** are sent to notify buyers or receivers that a shipment has been scheduled for delivery. These notices include shipping and delivery dates along with carrier and tracking information. You can also indicate the quantity of items being shipped and enter comments about the order.

Note: Customers must have the order acknowledgment and advance shipping notice settings enabled for your supplier organization.

When an order acknowledgment or advance ship notice is created, it displays header and line item information from the purchase order. By default, all lines are populated from the purchase order. Suppliers complete the following information:

- On an **order acknowledgment** header, suppliers enter a confirmation number and comments. For each line item they indicate whether they accept, reject or have back-ordered the item. They can also can also change the quantity, enter an estimated shipping date, and enter comments that are visible to the customer.
- On an **advance ship notice** header, suppliers enter a shipment number and add comments, then complete the Carrier, Tracking Number, Shipment Date, and Delivery Date fields. On line items they can change the quantity and enter comments that are visible to the customer.
- The **Remove Selected Lines** link can be used to remove individually selected lines. For example, if a supplier wants to confirm just one line, the other lines can be removed. Then, the same method is used to create a second order acknowledgment at another time for just the missing lines.
- If one or more lines are removed from an order acknowledgment or advance ship notice, the additional option to **Add Line Items** is available.
- The same line cannot be added multiple times. If a supplier needs to partially confirm/ship the quantity on an individual line, multiple order acknowledgments / advance shipping notices will be required. For example, if the customer order has one line for a quantity of 10 and the supplier wants to accept five and backorder the other five, then two order acknowledgments are created - one with a quantity of 5 set to Accept and one with a quantity of 5 set to Backordered.

- Suppliers can save changes and return to the document later. They can edit information or delete a document while it is in Draft status.
- Clicking **Send To Customer** sends the order acknowledgment or advance ship notice back to the customer. Once an order acknowledgment or advance ship notice is sent to the customer it cannot be changed.

Create an Order Acknowledgment

The **Create Order Acknowledgments** permission (User Profile > Permission Settings > Orders > Sales Order Fulfillment) is needed to perform this task.

Step-by-Step

1. In the supplier network, search for and open a **sales order** that is in Pending status (**Orders > Sales Orders and Shipments > Search Sales Orders**).
2. Click the **Order Acknowledgment** tab.
3. Expand the **Available Actions** menu and select **Create Order Acknowledgment**, then click **Go**. The Order Acknowledgment page opens and shows header and line item information from the sales order.
4. In the header section, complete these fields:
   - **Confirmation Number** - This fields displays a number generated by the system by default. Change if needed. This number entered here corresponds to the Shipment No. on the customer's purchase order.
   - **Comments** - Enter notes about the order that are visible to the customer.
5. For each line item, complete these fields:
   - **Quantity** - This field displays the number of items requested by the customer by default. Change if needed.
   - **Estimated Shipping Date** - Enter the expected shipping date. The actual shipping date may be different.
   - **Comments** - Enter notes about the line item that are visible to the customer.
   - **Status** - Select one of these options to indicate delivery of item:
     - **Accept** - Select to confirm that you will supply the item.
     - **Reject** - Select to indicate that you will not supply the item.
     - **Backorder** - Select to indicate that you do not have the item currently in stock, but you will supply the item when it becomes available.

> **Note:** You can use the **Line Actions** options to either remove line items from the sales order, or add them back in if they have been removed.

6. Once the fields are complete, choose one of these options:

   - Click **Save** to save your changes and return to the document later. You can edit information or delete the document while it is in Draft status.

   - Click **Send To Customer**. The document is sent. The status changes to **Sent To Customer** and the action is recorded in the History.

Create an Advance Shipping Notice

The **Create Advanced Shipping Notice** permission (User Profile > Permission Settings > Orders > Sales Order Fulfillment) is needed to perform this task.

Step-by-Step

1. In the supplier network, search for and open a **sales order** that is in Pending status (**Orders > Sales Orders and Shipments > Search Sales Orders**).

2. Click the **Advance Ship Notice** tab.

3. Expand the **Available Actions** menu and select **Create Advance Ship Notice**, then click **Go**. The Advance Ship Notice page opens and shows header and line item information from the sales order.

4. In the header section, complete these fields:
   - **Shipment Number** - This fields displays a number populated by the system by default. Change if needed. This number entered here corresponds to the Shipment No. on the customer's purchase order.
   - **Carrier** - Enter the name of the company that will be delivering the order.
   - **Tracking Number** - Enter a number that the customer can use to identify the order.
   - **Shipment Date** - Enter the date that the order will be shipped.
   - **Delivery Date** - Enter the date that the order will be delivered.
   - **Comments** - Enter notes about the order that are visible to the customer.
   - **Attachment** - Select the **Add Attachment** link.
     - Choose **Attachment Type**: File, or Link/URL.
     - Enter a **Name** for the File or Link. This will display to the customer.
     - Select (or drag and drop) the File, or enter the URL address.
     - Click **Save**.
     - To remove an Attachment, select the **Remove** hyperlink.

5. For each line item, complete these fields:
   - **Quantity** - This field displays the number of items requested by the customer by default. Change if needed.
   - **Comments** - Enter notes about the line item that are visible to the customer.

> **Note:** You can use the **Line Actions** options to either remove line items from the sales order, or add them back in if they have been removed.

6. Once the fields are complete, choose one of these options:
   - Click **Save** to save your changes and return to the document later. You can edit information or delete the document while it is in Draft status.
   - Click **Send To Customer**. The document is sent. The status changes to **Sent To Customer**, and the action is recorded in the History.

ADVANCED SHIPPING NOTICE - SHIPMENT DUE REMINDERS

If configured by a customer, supplier users with the **Shipment Due Reminder Received from a Customer** notification enabled will receive an email and/or in-app notification when goods or services have not been received within a specified number of days after the ASN delivery date

SALES INVOICES

This lesson discusses creating invoices – both from existing purchase orders and from non-PO order methods.

SALES INVOICES

In the JAGGAER ONE Supplier Network, you may create sales invoices for JAGGAER customers – both from existing purchase orders and from non-PO order methods. Some customers may also choose to share invoices with you that the customer originates in their own application. You can review invoice status from customers who choose to share that information.

Suppliers with customer invoicing relationships will see two areas on the **Home Page** that allow for quick access to creating and finding invoices/credit memos. Users can quickly create an invoice, import an invoice and search for invoices.

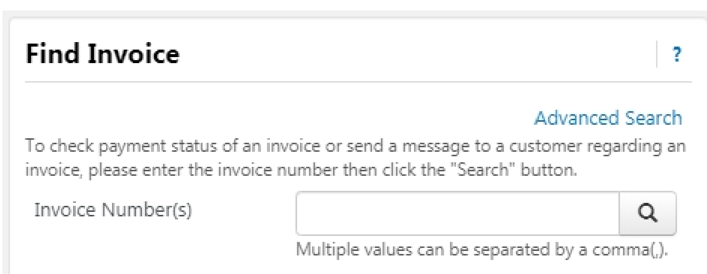
Customers may also navigate to a **Customer Portal** to manage invoices for a specific customer.

Search Sales Invoices

Sales Invoices can be accessed from the **Find Invoice** widget on the Home Page (in the Network or Customer-Branded Portal), or by navigating to **Orders > Sales Invoices > Search for Sales Invoices**.

Note: If your organization manages multiple suppliers, be sure you have selected the appropriate supplier name from the left side before searching.

From the Find Invoice widget, enter an Invoice Number or simply click Search to search all Invoices.



By default, all sales invoices from the last 90 days are displayed. Additional search options include:

- **Quick Date Search** - The default value is the last 90 days, and you can select the dropdown to filter by other date criteria.
- **Perform a Quick Search** - You can perform a quick search of the documents by entering a value in

the field and selecting the search icon . Matching documents are returned in the search results.

- Use the **Expand/Collapse** button - Beside the **Search [Document]** header, select the button to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.

Add filters for Advanced Search by selecting from the **Add Filter** button next to the Quick Search box, or by selecting from the **Quick Filters** tab to the left of search results.

Using the Add Filter button

- Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays.
- Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose Customer, an overlay displays where you can select the appropriate customer. **Important**: When there are many options, such as in the customer example, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
- When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. To remove specific values from a filter, deselect the options within the filter. Click the to remove the filter.
- Repeat the steps above to add additional filters.
- Click the Search icon. The search results update to reflect the new filters.

Using the Quick Filters Tab

- If necessary, click the Expand button and select options from the **Quick Filters** on the left. Click the **Show more...** link to see additional values for a filter, if present.
- Search results are refined based on selection, and the selected filter option is listed above search results.
- Click to remove the filter above search results, and/or continue to refine using the **Quick Filter** options.

For additional information about features on the Sales Invoice Search page, see **Orders and Invoices Search**, on page 142

Sales Invoice Filter Options

Identifiers

- **Purchase Order Number(s)** - Enter the customer purchase order number. To enter multiple purchase order numbers, separate with commas.
- **Record Number** - To find sales invoices based on a record number, enter a value. To enter multiple record numbers, separate with commas.
- **Sales Invoice Number** - Enter the sales invoice number. To enter multiple sales invoice numbers, separate with commas.

- **Supplier Account Number(s)** - To view sales invoices based on your organization's account number with a customer, a specific customer, enter the Account Number the customer uses for your supplier organization. Separate multiple account numbers with a comma.

Dates

- **Cancel Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Discount Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Invoice Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Latest Message Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections. **Note**: This information will not be available for all invoices.
- **Paid Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Payable Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Payment Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.
- **Submitted Date** - Select a standard date range or select to enter a custom date range. Click the **more options** link for additional date search criteria selections.

General Information

- **Created By** - Select the Current User and/or one or more users from the list. You can also enter a user's name to see suggested selections or use additional search options by selecting **Begin typing or click here to search**.
- **Customer(s)** - A list of customers is displayed for easy selection, or you can begin entering a customer name in the filter and the system will suggest customers for selection. Deselect a name to remove it from the filtered list.
- **Total Amount** - Use this field to search for sales invoices based on the total dollar amount. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between) then enter a dollar amount.

Item Details

- **Product Category** - Select from the listed categories, begin entering to select or click **Begin typing or click here to search** to find sales invoices with products associated with those categories. Deselect a category to remove it from the filtered list.

Properties

- **Invoice Type** - Select to view only Credit Memos or Invoices.
- **Message Category** - Select to view sales invoices with associated messages classified as Dispute, Invoice, Other or Payment. You can select multiple values. **Note**: This information will not be available for all invoices.
- **Pay Status** - Select to view sales invoices with a specific pay status. You can select multiple values. **Note**: This information will not be available for all invoices.
- **Payment Method** - Select to filter sales invoices with a specific payment method. You can select multiple values.
- **Status Flags** - Select to find sales invoices with the following flags:
  - Has Comments
  - Has Trade In items
  - With Retainage

Step by Step

The purpose of this task is to perform an advanced document search.

1. Navigate to **Orders** **> Sales Invoices > Search for Sales Invoices**.
2. Sales invoices for the last 90 days display.
3. Expand the **Created Date** dropdown filter to select a different date range.
4. Use the **Quick search** to search for sales invoices by number, PO number, customer, etc.
5. Click **Add Filter** and choose filter options. As filters are selected, additional options display. You can also click the **Expand/Collapse** button to view and filter from the **Quick Filters** panel on the left.
6. To remove a filter, click the next to the filter or deselect it in the **Quick Filters** list.
7. To save the search for repeat use, select **Save As**. See **Saving a Search**, on page 145 for additional information.
8. To view the search results in a file, select the **Export All** button for options. See **Export Search Results**, on page 150 for information about exporting search results.
9. Click **Clear All Filters** to return to the default view.

Creating Invoices

Suppliers may send electronic invoices and credit memos to customers based on sales orders viewed in the JAGGAER ONE Supplier Network. The sales order may be from any order delivery method – fax, email, portal, or cXML integration. If the customer allows, a user can also create invoices from an order that does not show in the JAGGAER ONE Supplier Network (for example, non-PO invoice).

Important notes about creating invoices within the supplier portal:

- Flip a sales order in your Supplier Network into an invoice or credit memo.
- Create a sales invoice or credit memo from an order that is not shown in the Supplier Network.
- Create a sales invoice or credit memo from a contract the buyer has associated to your organization, and add non-catalog contract lines to an invoice.
- Deliver the invoice electronically to customers with JAGGAER Accounts Payable solution. JAGGAER will configure the invoice capability if necessary for the customer. The customer can choose to disable the feature for specific suppliers.
- Fully or partially invoice orders.
- Include header and line level Notes and Attachments that are visible to the customer.
- Include Miscellaneous Fees configured and allowed by the customer.
- Search Sales Orders by “Has Invoices” flag.
- A user must have the Create Sales Invoices/Credit Memos permission to perform the action.

CUSTOMER VALIDATIONS

Customers can choose to validate invoices generated from a supplier portal or sent via cXML. See Customer Validations for Sales Invoices for more information in the **Supplier Network Portal General Management Handbook** or online searchable help for more information.

Creating Invoices from Customer Email

Customers have the ability to allow a supplier to create an invoice without having to separately log into the portal or use another process by sending an email with a link to create the invoice. For a PO-based invoice, the email contains a link that takes the supplier to a page with the PO information populated, and the supplier completes the additional details needed to submit the invoice to the customer. For Non-PO Invoices, the email link will take suppliers to a page where they can fill in the line information in order to submit the invoice.

The email is sent to the supplier **Primary Remittance Contact** in order to create an invoice from a link without logging into a portal or using a separate process. Only the supplier Primary Remittance Contact is authorized to complete this action.

HOW IT WORKS

When the supplier user receives an email to create a **PO Based Invoice** and selects the link:

- Select the **Click here to submit an Invoice for the referred PO** button. The Purchase Order Number is listed in the submitted line of the email by default.
- The Invoice Date, Invoice Owner, and Remit To address is displayed and is read-only. You can modify the Due Date. The Supplier Invoice No. is not required.
- The PO lines are listed with amounts, and you can modify the quantity, delete a line, and add Discount, tax, shipping & handling charges.
- You must click the **I am not a robot** checkbox, then click **Submit**.

- A confirmation page displays that an invoice has been created along with the Invoice Number and you will receive a **PO based Email Invoice Confirmation** email that the invoice was created. On the confirmation page, select the **Add Attachments** button to associate with the created invoice:
    - Select to add a **File** or **Link**.
    - When attaching a file, click the **Select files...** button and choose the appropriate file, or drag and drop it into the grey area next to the **Select files...** button.
    - When associating a link, enter an optional **Page Name**, and enter the **URL** link.
    - Click **Save Changes** to associate the attachment.
    - The page refreshes with an **Attachment** section, showing the attachment name. You can select to download or open the attachment, and also to **Remove** the attachment.
- A user can continue selecting the link and invoicing until the PO is fully invoiced. When it is fully invoiced, a message will display that the PO is fully or over-invoiced along with the invoice numbers already created. The user can continue to create invoices against a PO that is fully or over invoiced.
- The invoice is viewable in the supplier portal.

When the supplier user receives an email to create a **Non-PO Based Invoice** and selects the link:

- Select the **Non-PO Invoice Creation Link** button.
- You must enter your email for validation purposes. This **must be the primary remittance contact email** as listed in the supplier's profile, regardless of who the email was sent to.
- You must click the **I am not a robot** checkbox, then click **Validate**.
- The page refreshes with the Invoice Date and Remit To address displayed as read-only. The Supplier can modify the Due Date. The Supplier Invoice No. is not required.
- The Lines section contains entry boxes for Product Description, Unit Price, and Quantity. Click **Add Non-PO Item** to add the line.
- When finished entering items, you must click the **I am not a robot** checkbox, then click **Submit**.
- A confirmation page displays that an invoice has been created along with the Invoice Number and you will receive a **Non-PO based Email Invoice Confirmation** email that the invoice was created. On the confirmation page, select the **Add Attachments** button to associate with the created invoice:
    - Select to add a **File** or **Link**.
    - When attaching a file, click the **Select files...** button and choose the appropriate file, or drag and drop it into the grey area next to the **Select files...** button.
    - When associating a link, enter an optional **Page Name**, and enter the **URL** link.
    - Click **Save Changes** to associate the attachment.
    - The page refreshes with an **Attachment** section, showing the attachment name. You can select to download or open the attachment, and also to **Remove** the attachment.
- If the supplier has access to a portal, they can view the invoice in the portal.
- The link in the email does not expire and can be used repeatedly.

PO to Sales Invoice Flip

You may select to "flip" a sales order in your network into an invoice that is sent to the customer. A user will access the Sales Order the **Orders > Sales Orders and Shipments > Search for Sales Orders** page. Granted users have the option to **Create Invoice** or **Create Credit Memo** from a Sales Order from search results or from within the Sales Order view.

You may also quickly create an Invoice or Credit Memo from a Sales Order on the home page in the **Create Invoice/Credit Memo** widget by entering the appropriate PO number for the customer, and selecting to **Create** the invoice/credit memo.

If allowed by the customer, sales invoices can be associated with a contract, and catalog items from the contract can be added to an invoice. See Creating a Sales Invoice From a Contract in the **Supplier Network Portal General Management Handbook** or online searchable help for more information.

Sales Orders Flagged as Evaluated Receipt Settlement

Some customers have the ability to flag purchase orders as **Evaluated Receipt Settlement**, meaning an invoice will automatically be created in the customer's system and supplier's portal upon the receipt of goods. Sales Orders with this indication will not have the option to **Create Invoice** in the **Available Actions** dropdown. See Evaluated Receipt Settlement Orders and Automatic Invoicing from Customers for additional information.

Step by Step

The purpose of this task is to create an invoice from a sales order in your Supplier Network.

Create from the Home Page

1. Navigate to the **Home Page**.
2. In the **Create Invoice/Credit Memo** widget:
    a. If your organization manages multiple supplier accounts within your Supplier Network, select the appropriate **Supplier** from the drop-down. If you manage a single supplier ID in your portal, the option to select a Supplier does not display.
    b. Select the **Type** of document (invoice or credit memo).
    c. Enter an **Invoice No**. This field is optional to create the draft invoice, but an Invoice No. must be entered before it can be submitted to the customer.
    d. Select or enter the **Invoice Date**. The current date is displayed by default.
    e. Select the **Customer** from the dropdown. Only those customers with whom your organization has an invoice relationship will display.

i. If the customer has associated your organizations with contracts, you will see the option to create an invoice/credit memo from a **PO or Non-PO** or from a **Contract**. Select **PO Number** and enter the appropriate PO Number in the text box.

ii. If the customer does not have a contract relationship with you, you will see the PO Number field displayed. Enter the appropriate PO Number in the text box.

iii. **Note**: If you do not know the PO number, conduct a Document Search to identify the correct number.

f. Select the appropriate **Currency** from the dropdown.

3. Select **Create**.
4. Proceed to **Enter Details and Submit the Invoice** section below.

Create From a Sales Order Search

1. Navigate to **Orders > Sales Orders and Shipments > Search for Sales Orders.** See **Search Sales Orders**, on page 160.
2. To create the invoice or credit memo without opening the sales order, select the action dots to the left of the desired row (⋮). Select Invoice or Credit Memo.
3. To view the sales order prior to creating the invoice or credit memo, click the Sales Order number. From the dropdown box (from search results or from within the Sales Order view), select **Create Invoice** and **Go.**

Enter Details and Submit the Invoice

1. Enter the invoice details, including a Supplier Account Number and PO number, and **Save**.
2. If applicable for the customer, upload a PDF as the **Supplier Invoice Image**.
3. Enter **Shipping Address** details, if appropriate.
4. For some customers, you have the option of viewing or assigning an Invoice Owner:
   a. Next to the Invoice Owner name, select the **remove** hyperlink to remove the user as the invoice owner.
   b. Below the Invoice Owner name, select the **select a user...** hyperlink to select a customer user as the invoice owner. In the overlly, enter an email address to search for customer user. Click **[select]** to make that user the Invoice Owner.
5. Some customers configure **Additional Invoice Fields** to be completed by the supplier. If configured you will see a link to **view/edit** the additional fields. When selected, an overlay with the custom fields displays. Required fields are indicated with a star (★). Enter the appropriate information and click **Save**.
6. Provide header level **Attachments** if appropriate. See **Notes and Attachments on Sales Invoices**, on page 186 for additional information.
7. In the **Tax, Miscellaneous Fees, Shipping & Handling** section:

   a. Enter the appropriate discount, tax, shipping and handling amounts.

   b. If the customer has configured **Miscellaneous Fees**, enter the appropriate values. If the invoice has already been saved, edit Miscellaneous Fees by selecting the **view/edit** hyperlink to display an overlay.

8. **To remove items from the invoice**, select the checkbox for the item, and choose **Remove Lines** from the **Actions for Selected Items** dropdown button.

9. **To add line items not associated with a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Line Items** indication. An overlay displays.

   a. Enter appropriate line item information for the invoice.

   b. Click the Add Item button at the end of the row to add the item information to the invoice.

   c. When all lines are added select the **Add Lines** button to add the information to the invoice.

10. **To add line items from a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Lines from Contract.** An overlay displays.

    a. The valid contracts display. If you do not see a contract as expected, contact the customer. Select the appropriate contract number from which items will be added. Click **Next**.

    b. Any line items present on the contract display. To add an item to the contract, increase the **Quantity** as appropriate. Only lines with a Quantity greater than -0- will be added.

    c. If all the items are not displayed in the overlay, select the link to **Search Items on Contract** and select appropriate items.

    d. To add line items that should be associated with the contract on the invoice, but that are not currently listed on the invoice, select the link to **Add Additional Lines to Invoice**. Enter appropriate information and click the Add Item button at the end of the row.

    e. When all lines are added, select the **Add Lines** button to add the information to the invoice.

11. If the customer has configured custom fields to show at the line level, a link for **Additional Invoice Line Fields** displays for each line. When selected, the section expands to show the custom fields configured for the line. Required fields are indicated with a star (★). A value may be listed by default, depending on the customer's configuration. If a change is required, you must choose from the customer's available options for the field. Click **Save**.

12. Add a **Note** or **Attachments** at the line level, if appropriate. See **Notes and Attachments on Sales Invoices**, on page 186 for additional information

13. Select to **Save** the invoice if you are not yet ready to send to the Customer.

14. When you have completed the information for the invoice, select **Send to Customer**.

Non-PO Invoices

A Non-PO invoice is an invoice in your JAGGAER ONE Supplier Network that is not associated with any Sales Order in the Network. The customer must be configured to allow non-PO invoices for this feature to be available for a supplier.

The ability to create an invoice exists on the **Home Page** in the **Create Invoice/Credit Memo** widget, as well as the **Create Sales Invoice** page in the **Orders > Sales Invoices** menu. To create a Non-PO invoice or credit memo, select the customer, document type (invoice or credit memo) and currency, but do not enter a value in the PO Number field.

Once the draft invoice is created, you may add a purchase order number, if applicable. You will then enter all other appropriate information such as Remit To Location, payment terms, etc. If the customer has **Miscellaneous Fees** configured, enter the appropriate values. If a fee does not apply, leave the 0.00 value. You will then need to add the non-po lines to the invoice by selecting the **Add Line Items** icon in the **Line Item Details** area of the invoice. When you have finished entering all details and line item information, you will **Save** your changes and select **Send to Customer**.

ASSOCIATING CONTRACTS WITH NON-PO INVOICES

Some customers may have configurations in place to allow suppliers to associate a contract number with each line on a non-PO invoice. Once the invoice is sent to the customer, the invoice amount will be included in the total spend amount of the contract in the customer's application. This helps the customer more accurately report contract spend.

A contract can be added in the application while in draft invoice view, or in the bulk invoice import file. Also, non-catalog items that exist on the contract can be added to the invoice, as well as additional lines that should be associated with the contract on the invoice but are not currently listed on the contract.

For more information about creating invoices associated with contracts or adding contract lines, see Creating a Sales Invoice From a Contract in the **Supplier Network Portal General Management Handbook** or online searchable help for more information.

Step by Step

The purpose of this task is to create an invoice in the portal that is not associated with a Sales Order.

1. Navigate to the **Home Page**.
2. In the **Create Invoice/Credit Memo** widget
    a. If your organization manages multiple supplier accounts within your Supplier Network, select the appropriate **Supplier** from the drop-down. If you manage a single supplier ID in your portal, the option to select a Supplier does not display.
    b. Select the **Type** of document (invoice or credit memo).

c. Enter an **Invoice No**. This field is optional to create the draft invoice, but an Invoice No. must be entered before it can be submitted to the customer.

d. Select or enter the **Invoice Date**. The current date is displayed by default.

e. Select the **Customer** from the dropdown. Only those customers with whom your organization has an invoice relationship will display.

   i. If the customer has associated your organizations with contracts, you will see the option to create an invoice/credit memo from a **PO or Non-PO** or from a **Contract**. Select **PO or Non-PO**, and disregard the **Optional PO Number** text box.

   ii. If the customer does not have a contract relationship with you, you will see the PO Number field displayed, but do **NOT** enter a PO number for the invoice

   iii. **Note**: A PO Number that is not associated with a Sales Order in the Supplier Network may be entered when populating the Invoice Details at the line level.

f. Select the appropriate **Currency** from the dropdown.

3. Select **Create**.
4. Enter the invoice details, including a Supplier Account Number and PO number, and **Save**.
5. If applicable for the customer, upload a PDF as the **Supplier Invoice Image**.
6. Enter **Shipping Address** details, if appropriate.
7. Some customers configure **Additional Invoice Fields** to be completed by the supplier. If configured you will see a link to **view/edit** the additional fields. When selected, an overlay with the custom fields displays. Required fields are indicated with a star (★). Enter the appropriate information and click **Save**.
8. Provide header level **Attachments** if appropriate. See **Notes and Attachments on Sales Invoices**, on page 186 for additional information.
9. In the **Tax, Miscellaneous Fees, Shipping & Handling** section:

   a. Enter the appropriate discount, tax, shipping and handling amounts.

   b. If the customer has configured **Miscellaneous Fees**, enter the appropriate values. If the invoice has already been saved, edit Miscellaneous Fees by selecting the **view/edit** hyperlink to display an overlay.

10. **To add line items not associated with a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Line Items** indication. An overlay displays.

   a. Enter appropriate line item information for the invoice.

   b. Click the 

button at the end of the row to add the item information to the invoice.

   c. When all lines are added select the **Add Lines** button to add the information to the invoice.

11. **To add line items from a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Lines from Contract.** An overlay displays.
    a. The valid contracts display. If you do not see a contract as expected, contact the customer. Select the appropriate contract number from which items will be added. Click **Next**.
    b. Any line items present on the contract display. To add an item to the contract, increase the **Quantity** as appropriate. Only lines with a Quantity greater than -0- will be added.
    c. If all the items are not displayed in the overlay, select the link to **Search Items on Contract** and select appropriate items.
    d. To add line items that should be associated with the contract on the invoice, but that are not currently listed on the invoice, select the link to **Add Additional Lines to Invoice**. Enter appropriate information and click the + Add Item button at the end of the row.
    e. When all lines are added, select the **Add Lines** button to add the information to the invoice.
12. If the customer has configured custom fields to show at the line level, a link for **Additional Invoice Line Fields** displays for each line. When selected, the section expands to show the custom fields configured for the line. Required fields are indicated with a star (*). A value may be listed by default, depending on the customer's configuration. If a change is required, you must choose from the customer's available options for the field. Click **Save.**
13. Add a **Note** or **Attachments** at the line level, if appropriate. See **Notes and Attachments on Sales Invoices**, on page 186 for additional information.
14. When all details are entered and saved, select to **Send to Customer**.

Invoices Generated from Customer Check Requests and Invoice Imports

Customers have the ability to create check requests that generate an invoice without an original purchase order. Also, customers can utilize an invoice import process that creates invoices in their systems without a system Purchase Order associated, and therefore no Supplier Sales Order associated.

When a buyer-side invoice is created via check request or customer invoice import process, the system will generate the supplier-side Sales Invoice in the supplier's portal.

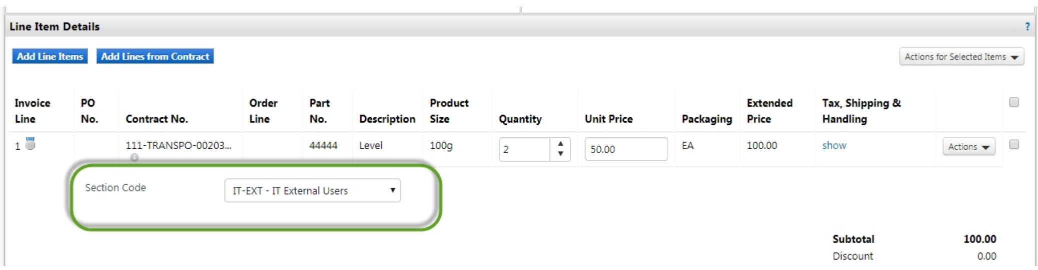
Create a Sales Invoice or Credit Memo from a Contract

Suppliers have the ability to create an invoice or credit memo in the Supplier Network Portal or Customer Branded Portal for those customers who have enabled that functionality for the supplier. Suppliers can create invoices and credit memo’s from purchase orders received in the portal, or without a purchase order (Non-PO invoice), and also based on a contract the organization has associated with the supplier.

An invoice can be created from a contract from the Create Invoice/Credit Memo widget on the Home page. Also, a contract can be associated with a sales invoice that is generated from a Purchase Order. When entering invoice/credit memo information, contract line item information is entered via a wizard. Suppliers can also add non-catalog items that are not on the contract to the invoice. When viewing the line items on an invoice, contract items are indicated with an icon.

Contract Custom Field Values

Customers may choose to make one of their organization custom fields visible to suppliers when invoicing for contracting items. If a customer has configured the contract in this way, supplier users will see a field below the line item information, and have the option to keep the customer's pre-configured value or select a different value. Some customers may make this field required in order to submit the invoice.



If there are 25 or less values, they are displayed in list form. If there are more than 25 values, the supplier will enter free-form text. If you enter a value that is not valid, an error message will display. If you have questions about the values available for selection, please contact the customer.

Contract Payment Terms

When a supplier creates an invoice from a contract, or creates a Non-PO Invoice and associates a contract with the line items on the invoice, payment terms associated with the contract will be applied to the invoice. This feature is available for sales invoices and credit memos created manually in the Supplier Network Portal or a Customer Branded Portal and from CSV Bulk Invoice Import. This feature does not apply to cXML invoices.

The payment terms associated with the invoice that contains contract items depend on when the contract items are associated and when the invoice is saved:

- When an invoice is created, the user can add multiple lines from multiple contracts without saving the invoice. Once the invoice is saved, the first line's contract payment terms are applied. For example, if you have just created a draft invoice and none of the lines are yet associated with a contract, then:
  - Assign Line 1 to Contract #ABC, but do not Save the invoice;
  - Assign Line 2 to Contract #DEF, but do not Save the invoice;
  - Assign Line 3 to Contract #GHI, and now Save the invoice.
  - It is assumed each of the above contracts had different payment terms. In this case, the system will use the payment terms from the Line #1 contract to associate to the invoice.

- As contract items are added to an invoice and the invoice is saved, the payment terms associated with that contract are applied to the invoice. For example, continuing with the scenario above:
    - Line 4 is added to the invoice and associated with Contact #JKL, which has different payment terms from the other three contracts. Save the invoice. Now, the payment terms from Contract #4 are associated with the invoice.
- If the sales invoice is created from a Sales Order (PO), the terms from the Sales Order will initially be used. However, if items from a contract with payment terms are added to that same Sales Invoice , the payment terms from the contract are applied to the Sales Invoice.

Organizations may have configurations in place to apply rules and logic to the payment terms on invoices once they are received by the customer. If a supplier changes the payment terms populated on the sales invoice, this may result in the buyer invoice having different payment terms than the supplier sales invoice that was submitted.

Note: When associating an invoice to a contract, or adding lines to an invoice from a contract, the supplier will only see active contracts that the customer organization has enabled for them. However, a supplier can associate items with contracts that have expired, in the case of an item being purchased prior to the contract's expiration. If you do not see a contract referenced as expected, please contact the customer.

Create Invoice from a Contract View

Supplier users with the permission to view contracts shared by buyers have the ability to create an invoice from the contract view. Users with the permission to create invoices and to view customer contracts will see the option to Create Invoice from the Actions dropdown button when viewing a contract. This feature allows the user to easily populate information in the invoice from the contract initially. To view contracts, a user must have the **View and Manage Contracts** (Permissions > Supplier Portal > Contracts) permission.

See Contracts in the **Supplier Network Portal General Management Handbook** or online searchable help for additional information.

Step by Step

The purpose of this task is to create an invoice based on a contract.

Create from the Home Page

1. Navigate to the **Home Page**.
2. In the **Create Invoice/Credit Memo** widget:
    a. If your organization manages multiple supplier accounts within your Supplier Network, select the appropriate **Supplier** from the drop-down. If you manage a single supplier ID in your portal, the option to select a Supplier does not display.
    b. Select the **Type** of document (invoice or credit memo).
    c. Enter an **Invoice No**. This field is optional to create the draft invoice, but an Invoice No. must be entered before it can be submitted to the customer.

d. Select or enter the **Invoice Date**. The current date is displayed by default.

e. Select the **Customer** from the dropdown. Select a customer with whom you have active contracts:

   i. If the customer has associated your organizations with contracts, you will see the option to create an invoice/credit memo from a **PO or Non-PO** or from a **Contract**.

   ii. Select **Contract**, then click **Next**.

   iii. **Note**: If you do not see the Contract option when the customer is selected as expected, contact the customer organization for assistance.

f. In the **Create Invoice - Choose Contract** overlay :

   i. Select the appropriate contract from the list. If you do not see a contract listed, you can search for contracts, and select the appropriate one. Click **Next**. The **Create Invoice - Choose Contract Line Items** overlay displays.

   ii. In the Line Items to Add section, non-catalog items present on the contract are displayed. To add an item to the contract, increase the **Quantity** as appropriate. Only lines with a Quantity greater than -0- will be added.

   iii. If all the items are not displayed in the overlay, select the link to **Search Items on Contract** and select appropriate items.

   iv. To add line items that should be associated with the contract on the invoice, but that are not currently listed on the invoice, select the link to **Add Additional Lines to Invoice**. Enter appropriate information and click the button at the end of the row.

   v. When all lines are added, select the **Create Invoice** button to generate the draft invoice.

3. Proceed to **Enter Details and Submit the Invoice** section below.

Create From a Sales Order Search

1. Navigate to **Orders > Sales Orders and Shipments > Search for Sales Orders.** See **Search Sales Orders**, on page 160.
2. To create the invoice or credit memo without opening the sales order, select the action dots to the left of the desired row ( ). Select Invoice or Credit Memo.
3. To view the sales order prior to creating the invoice or credit memo, click the Sales Order number. From the dropdown box (from search results or from within the Sales Order view), select **Create Invoice** and **Go.**

Create From Contract View

1. Navigate to the contract search: **Catalogs and Contracts > Contracts > Search Contracts**. You must have the new **View and Manage Contracts** permission to access the Search Contracts screen.
2. Select a contract eligible to invoice.

3. From the **Actions** dropdown, select **Create Invoice**.
2. The Contract Information is displayed in the Create Invoice overlay. Enter an Invoice Number and Invoice Date.
3. In the Line Item section, you can select from the items listed on the contract, if any.
4. Select the option to Enter Line Item Tax, Shipping, and Handling if appropriate for this invoice.
5. To add items, enter the appropriate information for the items associated with the contract. Note that required fields are indicated with a star (★). Select the **Add Item** button to add each line. Continue for each item to be added.
6. If you need to delete a line, click the **Remove** button beside the row.
7. When all items are added, select **Create Invoice**.

Enter Details and Submit the Invoice

1. Enter the invoice details, including a Supplier Account Number and PO number, and **Save**.
2. If applicable for the customer, upload a PDF as the **Supplier Invoice Image**.
3. Enter **Shipping Address** details, if appropriate.
4. For some customers, you have the option of viewing or assigning an Invoice Owner:
   a. Next to the Invoice Owner name, select the **remove** hyperlink to remove the user as the invoice owner.
   b. Below the Invoice Owner name, select the **select a user...** hyperlink to select a customer user as the invoice owner. In the overlay, enter an email address to search for customer user. Click **[select]** to make that user the Invoice Owner.
5. Provide header level **Attachments** if appropriate. See **Notes and Attachments on Sales Invoices**, on the next page for additional information.
6. In the **Tax, Miscellaneous Fees, Shipping & Handling** section:
   a. Enter the appropriate discount, tax, shipping and handling amounts.
   b. If the customer has configured **Miscellaneous Fees**, enter the appropriate values. If the invoice has already been saved, edit Miscellaneous Fees by selecting the **view/edit** hyperlink to display an overlay.
7. **To remove items from the invoice**, select the checkbox for the item, and choose **Remove Lines** from the **Actions for Selected Items** dropdown button.
8. **To add line items not associated with a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Line Items** indication. An overlay displays.
   a. Enter appropriate line item information for the invoice.
   b. Click the + Add Item button at the end of the row to add the item information to the invoice.
   c. When all lines are added select the **Add Lines** button to add the information to the invoice.

9. **To add line items from a contract**: In the **Line Item Details** area of the invoice, select the button to **Add Lines from Contract.** An overlay displays.

    a. The valid contracts display. If you do not see a contract as expected, contact the customer. Select the appropriate contract number from which items will be added. Click **Next**.

    b. Any line items present on the contract display. To add an item to the contract, increase the **Quantity** as appropriate. Only lines with a Quantity greater than -0- will be added.

    c. If all the items are not displayed in the overlay, select the link to **Search Items on Contract** and select appropriate items.

    d. If the customer has configured a **custom field**, it will be displayed below the line item information. The customer may have a pre-configured value. If appropriate, select a different value. Contact the customer if you do not know which value to select or are having trouble selecting a valid value.

    e. To add line items that should be associated with the contract on the invoice, but that are not currently listed on the invoice, select the link to **Add Additional Lines to Invoice**. Enter appropriate information and click the + Add Item button at the end of the row.

    f. When all lines are added, select the **Add Lines** button to add the information to the invoice.

10. Add a **Note** or **Attachments** at the line level, if appropriate. See **Notes and Attachments on Sales Invoices**, below for additional information.

11. When you have completed the information for the invoice, select **Send to Customer**.

Notes and Attachments on Sales Invoices

The supplier portal allows suppliers to create sales invoices with multiple attachments and add a note to the sales invoice header. These notes and attachments are transferred to buyer invoices and displayed on the buyer invoice header. Buyers can also add external notes or attachments to a buyer invoice, and can choose whether or not the attachments are viewed by the supplier.

Notes and **Attachments** can be added to a sales invoice created in the Supplier Portal while in **Draft** status. Once it is sent to the customer, the supplier can no longer make changes to notes or attachments. Also, supplier **Notes** and **Attachments** cannot be added to buyer-originated invoices.

Note: A supplier user cannot edit attachments and notes added by a buyer user. A buyer user cannot edit attachments added by a supplier user.

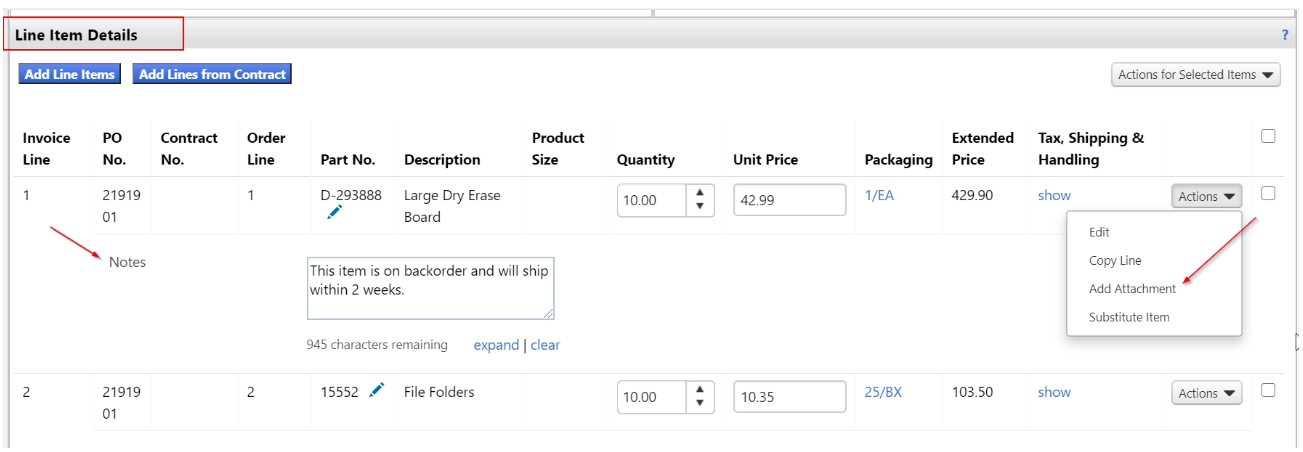
Header Level Notes

Suppliers can add a note that applies to the entire invoice. Enter up to 1000 character in the Notes field displayed in the Shipping section of the invoice.

Buyers can view and modify the note, if necessary.

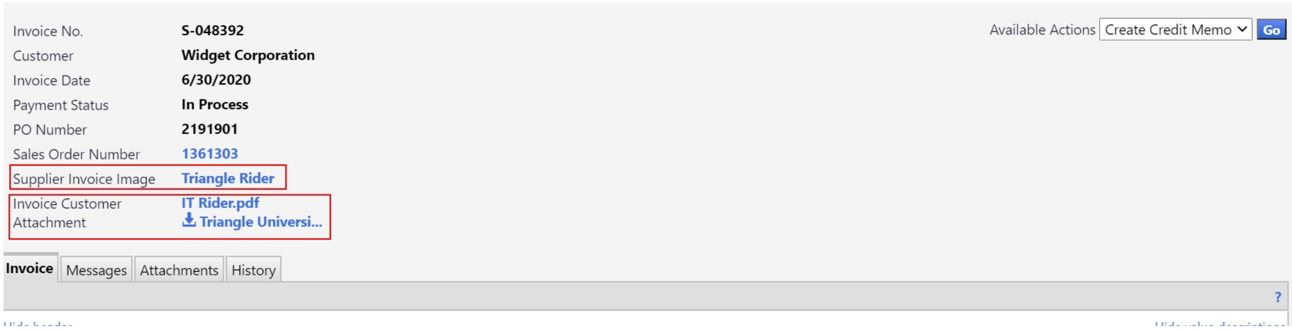
Line Level Notes and Attachments

Supplier users have the ability to add *line-level notes* and *attachments* to a sales invoice created in the Supplier Portal that can be viewed by the buyer in the buyer invoice. When creating a sales invoice, the **Line Item Details** section displays a **Notes** section for each item. You can enter up to 1000 characters. Also, an **Add Attachment** option is available in the dropdown **Actions** for each item. Line level attachments are also displayed on the **Attachments** tab. If a line is copied, the note is copied as well.



Sales Invoice Header Attachments

A **Supplier Invoice Image** field is available in the header section of the sales invoice. Suppliers can upload one or more **.pdf** format files. Once an invoice is submitted to the customer, the **Supplier Invoice Image** cannot be changed by the supplier. **Note**: For Global Invoicing customers, this option only displays for Paper legal type invoices.

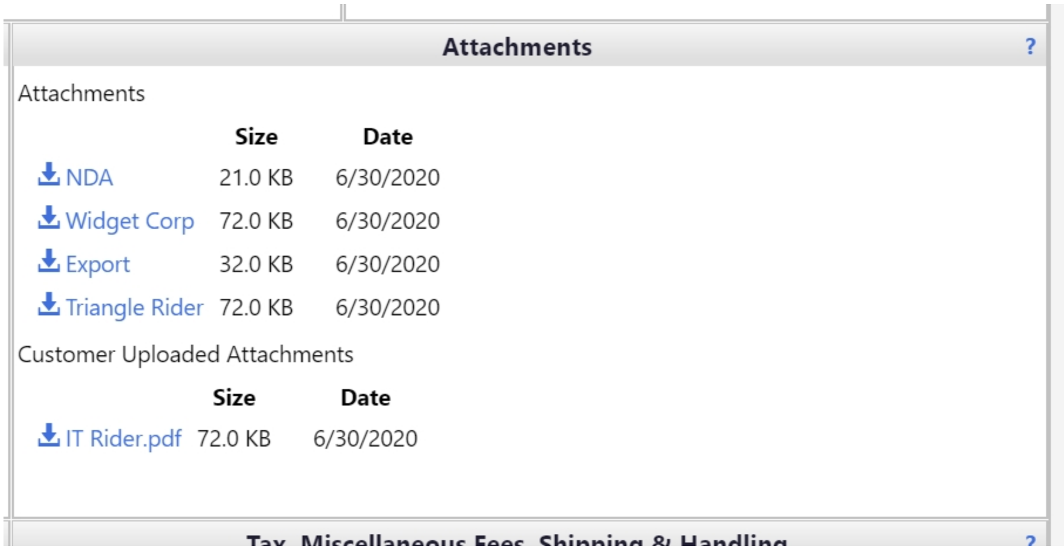


An **Invoice Customer Attachment** field displays in the header section, if attachments are configured to show on the sales invoice by the buyer. This field lists all attachments added by the buyer at the header and line level (if configured to display by the buyer).

Attachments Section on Invoice Page

An **Attachments** section on the **Invoice** page of the Sales Invoice displays attachments added by the supplier as well as customer uploaded attachments (if configured). Select to Add or Remove attachments while the sales invoice is in draft status. **Note**: This section does not display attachments added at the line level.

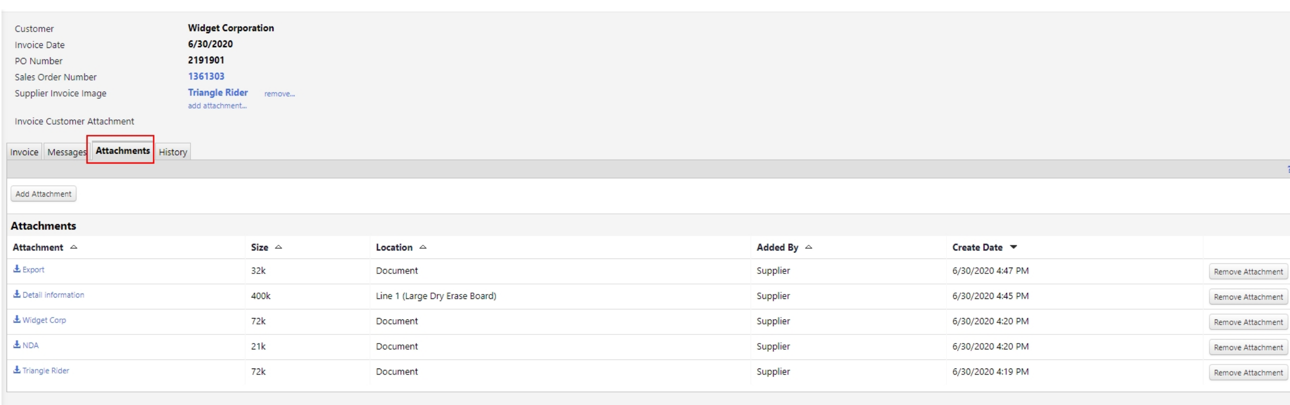
Attachments can be added to a sales invoice created in the Supplier Portal while in **Draft** status. Once it is sent to the customer, the supplier can no longer make changes to attachments. The supplier cannot add attachments if the invoice originates from the buyer organization.



Attachments Tab

An **Attachments** tab in the Sales Invoice displays all attachments added by the supplier and buyer, indicating specific line location, if applicable.

- Click the **Add Attachment** button to add another header-level attachment to this section. Click the **Remove Attachment** to remove the attachment.
- If the invoice is created by the supplier, attachments can continue to be added or removed until the invoice is sent to the customer.
- Supplier users cannot make changes to attachments added by the buyer.



Suppliers View Buyer Notes and Attachments

The Sales Invoice in the Supplier Portal displays **Notes** a buyer adds to the buyer-side invoice.

- Header section **Notes** that apply to the invoice display in the **Shipping Info** section on the Invoice page.
- Line level **Notes** appear under the associated line item in the **Line Item Details** section.

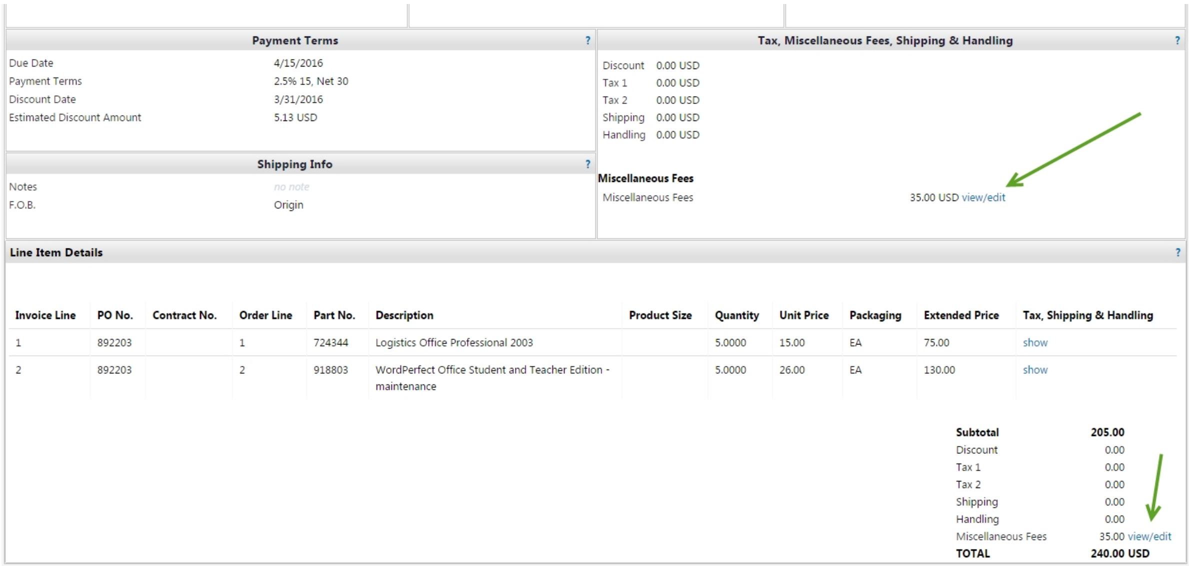
Buyers can choose whether or not to display attachments to a supplier. If allowed, buyer attachments display in the **Attachments** section of the invoice as well as the **Attachments** tab.

Miscellaneous Fees on Invoices

Customers can configure their invoices documents to include additional charges or fees associated with the product or service, such as an Excise fee or Recycling fee. The fees are not subject to tax, and are listed in the **Tax, Miscellaneous Fees, Shipping & Handling** section of the invoice. The fees are also displayed in the totals section of the invoice.

Customers can include up to 15 different fee fields on an invoice, and can name the fees specific for their organization. When you select to create an invoice for a customer in the Supplier Portal or Customer Branded Portal, you will see the **Miscellaneous Fees** that organization has configured. If you send invoices to the customer electronically, you will need to send the Internal Name for the appropriate Miscellaneous Fees in the invoice message. Contact the customer for the Internal Name values.

Once the invoice is sent to the customer, the **Miscellaneous Fees** total is displayed in the **Tax, Miscellaneous Fees, Shipping & Handling** section as well as the Totals section. View the values by selecting the **view/edit** hyperlink.



For details on entering **Miscellaneous Fees** on an invoice, see Non PO Invoices and PO to Sales Invoice Flip.

MISCELLANEOUS FEES ON INVOICES SENT ELECTRONICALLY

If you send invoices to customers electronically, contact the customer for the appropriate Internal Names for their configured Miscellaneous Fees.

Customer Payment Terms on Sales Invoices

All customers can configure Net type payment terms, which suppliers may be allowed to edit on the Sales Invoice. Customers may also choose to configure additional payment types. For non-PO invoices and if allowed by the customer, supplier users can select a payment term type from the drop-down list and enter appropriate values. One or more of the following payment term types may be displayed:

- **Net** - Net days is the most common type of payment term. Payment is due X number of days after the invoice date, where "X" is specified by the customer in the Days After field. The calculation used for this payment type is Due Date = Invoice Date + Days After value.

  Example: Payment terms are displayed as 10% 5, Net 30. This means a 10% discount will be applied if the invoice is paid within 5 days, otherwise the full invoice amount is due 30 days after the invoice date.

- **EOM** - End of Month. Payment is due on the last day of the month, in the month of the invoice date. This type can be configured with a Days After value, in which case payment is due by X days after the last day of the month. The calculation used for this payment type is Due Date = Last day in month of invoice date + Days After value.

Example: Payment terms are displayed as 10% 5, EOM 10. This means a 10% discount will be applied if the invoice is paid within 5 days, otherwise the full invoice amount is due 10 days after the last day of the month.

- **MFI** - Month Following Invoice. Payment is due a specified number of days into the month *following* the month of the invoice date. The calculation used for this payment type is Due Date = First day of month after invoice date + Days After value.

  Example: Payment terms are displayed as 10% 5, MFI 10 and the invoice date is May 1. This means that a 10% discount will be applied if the invoice is paid within 5 days, otherwise, the full invoice amount is due on June 11 (June 1 plus 10 days from the Days After value). If an invoice was issued on May 26 with the same payment terms, it would also be due on June 11.

- **Manual** - In this type, the due date is set by the customer user.

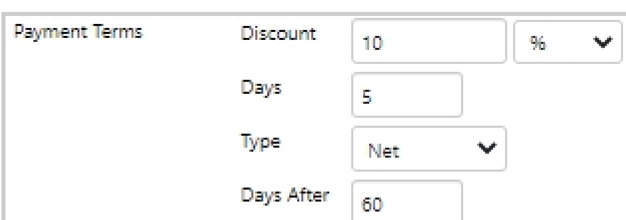
  Example: Payment terms are displayed as 10% 5, Manual. This means that a 10% discount will be applied if the invoice is paid within 5 days, otherwise the full invoice amount is due on the specified due date.

- **EOQ** - End of Quarter. Payment is due on the last day of the quarter, in the quarter of invoice date. The quarters are based on the calendar year (not an organization's fiscal year). The calculation used for this payment type is Due Date = Last day of calendar quarter + Days After value.

  Example: Payment terms are displayed as 10% 5, EOQ 10. This means that a 10% discount will be applied if the invoice is paid within 5 days, otherwise the full invoice amount is due 10 days after the end of the calendar quarter.

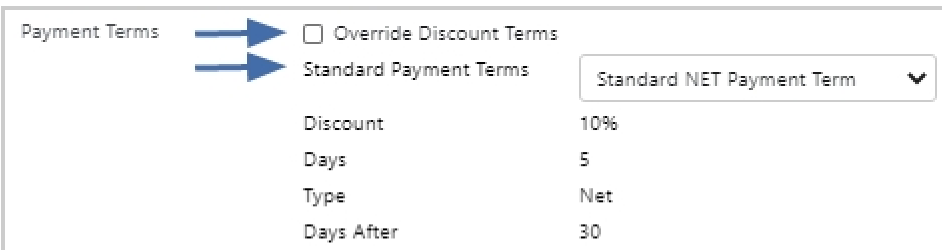
- If **Standard Payment Terms** have been configured for the customer organization, a **Standard Payment Terms** field is displayed next to the payment term fields. All Payment Term fields are read-only. You can select the **Override Discount Terms** checkbox to edit the discount terms.

When viewing the payment terms on a Sales Invoice, the first two fields are used to define any discount that would be applied for early payment, and the last two fields are used to calculate the due date for the full invoice amount.



- The **Type** field determines how the invoice due date will be calculated.
  - The default Type is **Net**. It is the only option that can be selected (if allowed) if no other payment term types are enabled by the customer.
  - If additional **Payment Term Types** are activated, the Type field will display payment term types in a drop-down list on the sales invoice.

- A **Days After** field is used to add extra days to the invoice payment Type to extend the due date of an invoice. The field is required, optional, or not available depending on the payment Type selected. For example, if Net is the payment type, users are required to enter the number of days after the invoice date that the invoice must be paid. If the new payment type EOM is selected, this means the invoice is due at the end of the month. If a number is entered in the Days After field, the number of days will be added to the last day of the month to determine when the invoice is due.
- If enabled by the customer, a **Standard Payment Terms** field is displayed next to the payment term fields. The Discount, Days, Type, and Days After fields are read-only and display information for the selected standard payment term. Suppliers can select a standard payment term from the drop-down list if the field is editable.
- An **Override Discount Terms** checkbox is displayed which, when enabled, allows users to change the Discount and Days field values for a standard payment term. The Type and Days After fields remain read-only. If the checkbox is cleared, the payment terms return to standard payment term's default settings.



Note: Sales Invoices for Global Invoicing Customers - Payment term settings have been updated so that suppliers cannot change payment terms on PO-based invoices. Suppliers can change discount options.

The Sales Invoice Import (**Orders** > **Sales Invoices** > **Import Invoices**) allows for the multiple payment term types via the following columns in the import template:

- StandardPaymentTermsCode
- DueDatePaymentTermType
- PaymentTermsDaysAfter

Adding Non-PO Lines During Invoicing

Within the Supplier Network you can add Non-PO lines when creating invoices for existing sales orders. After creating an invoice or credit memo for a Sales Order in the Network, you have the ability to add a line to that invoice that was not on the original sales order.

In order to add Non-PO lines you must have the **Create Sales Invoices/Credit Memo** permission. The customer must be configured to accept non-po items on the invoice.

Substituting Items on Invoices

Within the Supplier Network Portal you can substitute items when creating invoices for existing sales orders for customers that allow substitutions. After creating an invoice associated with a Sales Order in your Supplier Network, you may change an item on an invoice to be the actual item that was shipped.

In order to substitute lines you must have the Create Sales Invoices/Credit Memo permission. The customer must be configured to allow substitutions on the invoice for this option to be available. If the customer does not allow substitutions, you will not see the option in the invoice.

In the draft invoice view, navigate to the **Line Item Details** section of the invoice. Select the edit icon to display an overlay where new item information can be entered.

Note: Any line associated with a Purchase Order can be substituted; however, lines from a Form cannot be substituted. If a user substitutes an item and then substitutes that item again with a complete duplicate of the original, it will not be considered or displayed as a substitution.

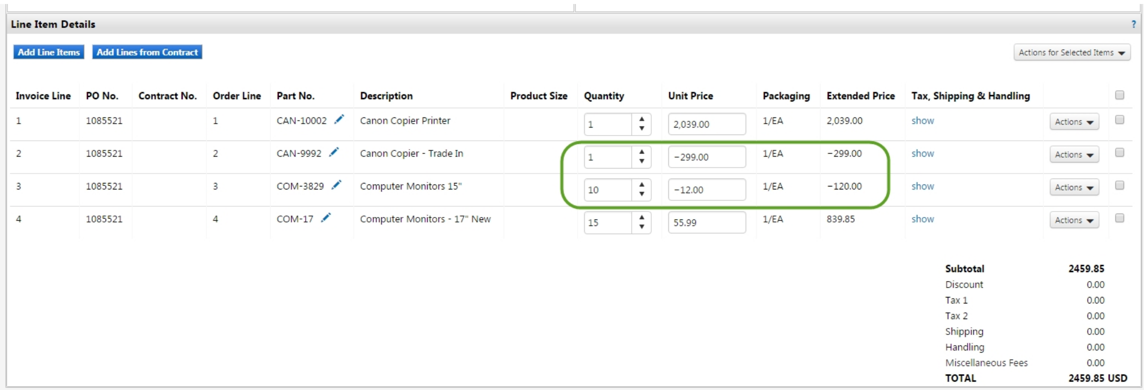
Step by Step

The goal of this task is to substitute an item on an invoice from a buyer.

1. Create an invoice. Refer to Creating Invoices topic for details.
2. In the invoice view, navigate to the **Line Item Details** section.
3. Select the pencil icon ( ) under the Part No. to be substituted, or select the **Actions** dropdown button at the end of the row for the item to be substituted. Select **Substitute Item** in the dropdown. A **Substitute Line Item** overlay displays.
    a. Note that the original item information is stricken through, and you can make the necessary changes to Part Number, Description, Product Size, Quantity, Unit Price and Packaging.
    b. Indicate if the substituted item is **Taxable** by selecting the Yes or No radio button in the **Tax, Shipping & Handling** section.
    c. Enter values for Discount, Tax, Shipping, and Handling as appropriate.
    d. Click **Save Changes**. The overlay closes.
4. Notice in the Line Item Details section, the original item information is stricken through, and the revised information displays below.
5. Proceed with any other invoice changes.
6. **Save** the invoice and select to **Send to Customer**.

Trade-In Items on Sales Invoices

When trade-in items are included on a sales order, those items are included when the sales invoice is created, unless first removed before invoice creation. The trade-in items are indicated by the negative amount.


Line Item Details

Add Line Items | Add Lines from Contract | Actions for Selected Items

Invoice Line	PO No.	Contract No.	Order Line	Part No.	Description	Product Size	Quantity	Unit Price	Packaging	Extended Price	Tax, Shipping & Handling	
1	1085521		1	CAN-10002	Canon Copier Printer		1	2,039.00	1/EA	2,039.00	show	Actions
2	1085521		2	CAN-9992	Canon Copier - Trade In		1	−299.00	1/EA	−299.00	show	Actions
3	1085521		3	COM-3829	Computer Monitors 15"		10	−12.00	1/EA	−120.00	show	Actions
4	1085521		4	COM-17	Computer Monitors - 17" New		15	55.99	1/EA	839.85	show	Actions

Subtotal	2459.85
Discount	0.00
Tax 1	0.00
Tax 2	0.00
Shipping	0.00
Handling	0.00
Miscellaneous Fees	0.00
TOTAL	2459.85 USD

As a supplier, you cannot add a trade-in item to a sales order or sales invoice. However, you can choose to remove a trade-in item from a sales order or a sales invoice in the same way that any line can be removed from an invoice. If you have the ability to substitute items on an invoice, you can also enter substitute item information for the trade-in item.

If you include negative amounts on cXML invoices to the buyer, and it matches to a trade-in item on the buyer PO, then the trade-in information will be copied to the buyer invoice.

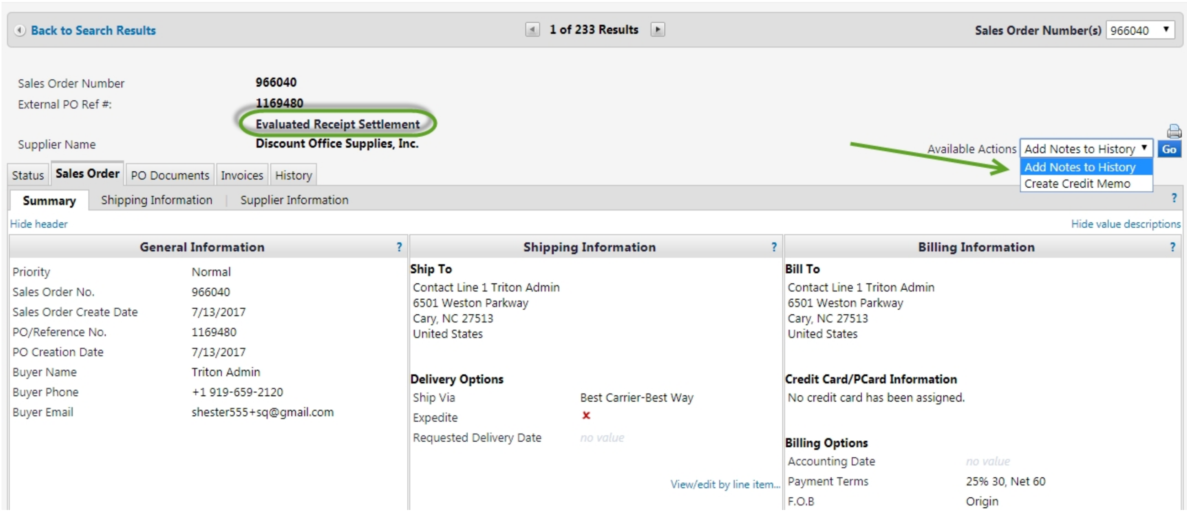
Evaluated Receipt Settlement Orders and Automatic Invoicing from Customer

Many customers would like to invoice suppliers upon receipt of goods. This helps the customer simplify business processes by having the system generate invoices automatically from receipts, saving the customer user or supplier user from having to create the invoice manually. Once a completed receipt is submitted into the customer's system, an invoice is automatically created.

When viewing Sales Orders in the Supplier Network or Customer Branded Portal, suppliers will see an indication that the document is flagged as **Evaluated Receipt Settlement**. The action to create an invoice is not available for ERS flagged sales orders. When a receipt is submitted in the customer organization, a buyer invoice and corresponding supplier sales invoice will be created.

Note: This feature does NOT affect Credit Memos. You can create a Credit Memo for a Sales Order that is flagged as ERS.

In the following image, note that the Sales Order is indicated with **Evaluated Receipt Settlement** in the header information. Also, there is no option to **Create Invoice** in the **Available Actions** dropdown.



How It Works...

When the customer submits a receipt in their system for the products/services in the Sales Order, an invoice is automatically created in the buyer system. Concurrently, a Sales Invoice is created in the Supplier Network and Customer Branded Portal.

- The Receipt date is used as the Invoice Date.
- If the supplier provides a Packing Slip Number and the customer has entered it for the receipt, that number is used as the Supplier Invoice Number. If there is no packing slip number provided, the Supplier Invoice Number is "Receipt Number + ERS" (e.g. 306650-ERS).
- The ERS Invoice Number (Buyer) is listed in the Invoice tab of the supplier side sales order.
- Only those goods/services that the customer has actually indicated as received will be listed on the invoice.
- Validation for creating invoices is also applied to **CSV Bulk Invoice Import**. Invoices will not be created for Sales Orders that are flagged as ERS.
- A supplier can send a **cXML invoice** for an ERS Sales Order to a customer. However, the customer should have workflow rules in place that will catch such invoices. The customer can then contact the supplier to notify them an invoice will be generated once goods or services are received.

Customer Validations for Sales Invoices

Customers can enable a setting to automatically reject supplier portal invoices for price and tax discrepancies. If you have a contract associated with a sales order, the customer can also enable validations based on quantity and spend limitations, as well as contract price.

PRICE AND TAX DISCREPANCIES

This feature allows buyers to manage how a supplier is notified if the supplier attempts to submit an invoice with line item price or tax amounts that are more than the associated purchase order line item amounts. The buyer can choose to ignore discrepancies or prevent the supplier from submitting the invoice when the amounts are more than the purchase order.

When a customer has implemented this feature, a supplier will see an error message for the applicable lines when attempting to submit an invoice that has discrepancies. The prices and/or tax amounts must be corrected before the invoice can be submitted to the customer. If the invoice is sent via cXML integration, the supplier will see the appropriate warning or error message for the invoice on the cXML Invoice Import History page in the portal. For more information, see cXML Invoice Import History. The error message will indicate the line amount that must not be greater than the PO value in order to be submitted.

Each customer determines how to handle invoice discrepancies with suppliers, therefore the experience with each customer may be different. Customers may continue to contact suppliers outside of the system if there are invoice discrepancies.

CONTRACT BASED VALIDATIONS FOR MINIMUM AND MAXIMUM AMOUNTS

Customers can configure a warning or error to display for any of the following on a sales invoice, as defined in the associated contract(s) for the items on the invoice:

- Item Quantities exceed a maximum quantity allowed for an item: For example, if the customer has defined a maximum of 10 per invoice for a certain item, a warning or error can show if there are more than 10 of the item on the invoice.
- Contract Spend limits have been exceeded: For example, if the customer has defined a total contract spend as $1000, and the sales invoice includes items that will bring the spend to over that mount, a warning or error can display.
- The contract price is different on the invoice than as defined in the contract: For example, if the price defined in the customer's contract is $10.00 for an item, a warning or error will show if the price is greater than that amount.

If an error is configured to show, the supplier will see the error message and be prevented from submitting the invoice. If a warning is configured, the supplier will see a warning message but can submit the invoice. The customer can also choose to ignore any of these validations, and the supplier will not see any warning or error messages in the application.

If the invoice is sent via cXML integration, the supplier will see the appropriate warning or error message for the invoice on the **cXML Invoice Import History** page in the portal (Orders > Sales Invoices > cXML Invoice Import History).

CSV Invoice Import

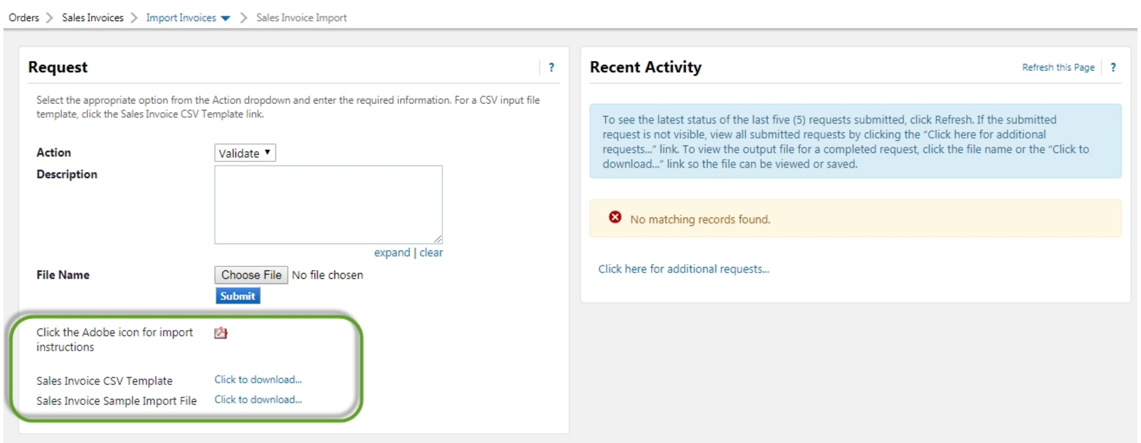
Within the supplier network portal you can import invoices and credit memos for all customers using a CSV file import. A template is provided in the JAGGAER ONE Supplier Network that you may download to access the proper format. Once completed, the documents can be uploaded to your Network. This will create the sales invoices in your Network and transfer them to the customer.

Within this import you can import non-po invoices, add non-po lines to existing invoices, and perform item substitution. This is a means by which you would get a “bulk” amount of data into the portal and to the customer in one step.

The template for importing invoices is located on the page **Orders > Sales Invoices > Import Invoices.** Also on this page are downloadable instructions on how to complete the template and submit the file as well as a sample file format.

For detailed instructions, click the Adobe icon on the page to download an instruction document.

In order to perform the CSV Invoice import you must have the Create Sales Invoices/Credit Memos permission.



Step by Step

The goal of this task is to demonstrate importing invoices and credits in batch through the JAGGAER ONE Supplier Network.

Getting Started - Downloading the template

This task is relevant if you are starting "new" and would like to begin sending invoices to your customers.

1. Navigate to **Orders > Sales Invoices > Import Invoices**.
2. Locate the **Sales Invoice CSV Template**, select the **Click to download….** link.
3. When prompted, save the file.

Add the invoice data

After you have downloaded the template file, the next step is to begin updating the file.

4. Open the file using MS Excel. The file is a .csv file, but you can open it in MS Excel and make the updates from there.
5. There are a number of columns in the system. You cannot move or delete any of these columns, but they can be hidden while you are working. For more information on populating the columns, refer to the File Format section. Keep in mind:
    a. The following fields have a specific date format that is not the default for MS Excel: **Invoice Date**, **Invoice Due Date**. MS Excel will reformat dates into a format that is incompatible with the JAGGAER standard. **It is recommended that the cell format be modified to Text format.**
    b. Most of the fields/columns are optional and the order of columns is important. **The order of the columns may not be modified**.
    c. All available system **Miscellaneous Fees** are listed in the template. The Customer can remove any fees submitted with an electronic invoice if they do not have the fee configured for their organization.
6. After all invoices and credits have been entered, save the file in a .csv format.

Validating invoice data

7. On the **Sales Invoices > Import Invoices** page, select the **Action** from the drop-down box. By default, the **Validate** action is selected and is recommended. An explanation of the types is listed below:
    a. **Validate** - Will check the file for data issues. No invoices or credits will be created and delivered to customers.
    b. **Import** – Validates the file data. All invoices and credits that are free of errors will be created in the network and delivered to customers.
8. Enter a description for the file being imported. This is a required field and is the name that will be used to reference the export. We recommend using a meaningful description such as “Invoices for Q2 2013” or “August invoices”.
9. Browse and locate the file to be imported in the **File Name** field. The file must be in a .csv format.
10. Click the **Submit** button. The import file displays on the right side of the screen. If there are any issues, they will be listed on the right side of the screen. These issues should be corrected before importing the data.

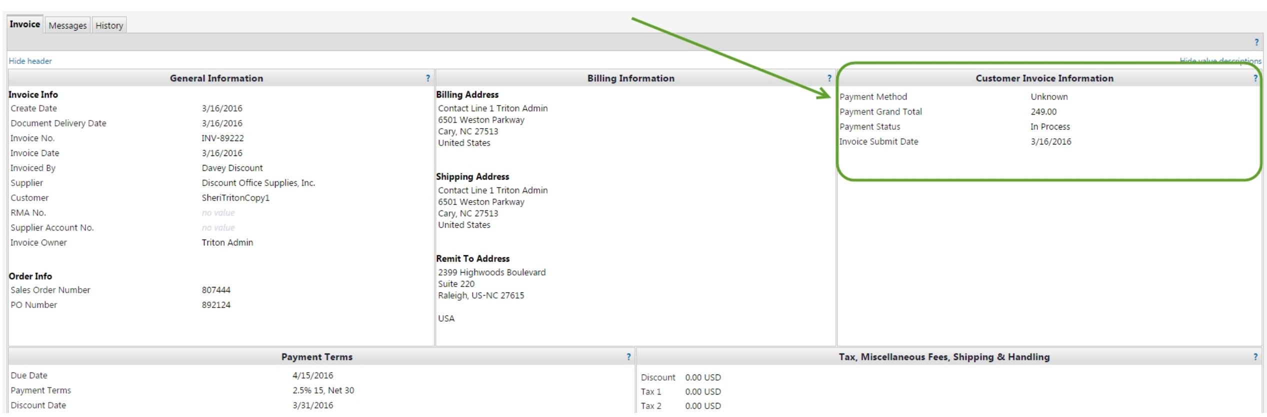
Importing invoices and credits

11. It is assumed that the file has been validated. After the file is validated and found to be without errors or warnings, click the **Click to import…** link under the file name in the **Recent Activity** panel.
12. A validation window displays. Click **Ok**. The invoices will be created in the supplier network and delivered to the customer(s). The import can be viewed via the application.
13. Upon import completion, you may review the invoices through **Orders > Sales Invoices > Search for Sales Invoices**.

Reviewing Invoice Status

Some purchasing organizations have the ability to share invoice status and payment details with their suppliers. Those organizations may invite you to review these details through your supplier network portal. If you have been invited, you will be able to locate the invoices through document search and review the details directly from the invoice. If you have been invited to view status details, you will be able to view the status of all applicable invoices including those created in the portal and/or those located in the organization's JAGGAER application (i.e. invoices you sent electronically or by paper that have been imported into the customer's application).

When you are viewing the invoice, the area for Customer Invoice Information shows details on the payment status:



When an organization invites a supplier to view invoice details, one of the following actions will occur:

- Suppliers who do NOT have an existing Supplier Network Portal will have to register with the customer so that they can have a Supplier Network Portal account created. The organization can send the supplier the URL and registration instructions.
- Suppliers who do have an existing Supplier Network Portal will immediately be able to locate shared invoices through document search and view the status. No notification will be sent that this capability is active. The customer organization will show in the Registration Outlook section of the home page under Customer Portal Access as New Request(s).

Invoices Modified by the Customer

The customer version of an invoice is called the **buyer invoice**. Buyers may pull invoices out of their workflow by returning an invoice within the organization. Once the buyer invoice is returned within their system, the buyer can make changes such as modifying payment information, adding lines, and deleting lines. When a customer removes a line from a buyer invoice, the lines are immediately removed from the corresponding sales invoice in the supplier portal. However, other changes are not reflected in the supplier portal sales invoice until the buyer resubmits the modified invoice into their workflow process. This means that a supplier may see fewer or even no lines on a sales invoice, yet see payment grand totals which equal the original amount. When the buyer invoice enters workflow, all changes will be effective, including the modified grant totals, payment information, and line details.

If you include **Miscellaneous Fees** on an invoice, the customer can edit the values.

Invoices and Credit Memos for Global Invoicing Customers

Customers conducting business internationally need to be fully compliant with eInvoicing legal requirements in the various countries where they do business. **Global Invoicing** is a feature available to customers that supports B2B eInvoicing legislation requirements mandated in the European Union (excluding Italy and Portugal), Asia Pacific and the Middle East. The **Global Invoicing** feature helps customer organizations configure their system so that it:

- Captures the data required to meet country specific requirements for electronic invoicing.
- Ensures the authenticity of the origin and integrity of the content.
- Meets archiving requirements (buyer side only).

Suppliers will note the following for **Global Invoicing** customers:

- Suppliers will be able to complete a specific set of supplier profile fields when they register for a **Global Invoicing** customer.
- When a supplier submits a sales invoice to a **Global Invoicing** customer from the supplier portal, a specific set of invoicing fields are displayed and may be required.
- The **Remit To** address **Country** is always required on supplier portal invoices (both PO and non-PO) and invoices cannot be modified after submission (except when the invoice fails issuance and returns to a draft state). This applies to both manual and bulk upload portal invoices.
- Suppliers cannot use the CSV bulk upload option for **Global Invoicing** customers.
- Once a global eInvoice is issued/signed and/or archived, a new option on the invoice allows users to view the issued **eInvoice PDF** (which may include a digital signature).
- The **Invoice to Credit Memo** settings are changed so that credit memos can only be created from an invoice (both PO and non-PO invoices).

- If an electronic sales invoice fails to be issued, the supplier will be notified via a system email alert and may need to correct some specific data/information.
- Payment terms that are inherited from a PO cannot be edited on a PO-based Sales Invoice.

Customer Branded Portal - Registration Profile

The Customer Registration Profile Form may contain the following fields for a **Global Invoicing** customer:

- **Company Information**:
  - **VAT Registration Number** - This field is available if the supplier profile country is European.
  - **VAT Exempt** - A checkbox to indicate if the supplier organization is exempt from VAT taxes.
  - **Supplier Tax Representative ID** - If applicable, specify the supplier's tax representative Tax ID number in a tax field. This is an option to delegate the VAT tax payment to another legal entity if the supplier organization itself is not a legal tax entity in the country to which VAT is paid.
  - **Commercial Registered Court** - If applicable to your country, specify the district court or office where your supplier organization is registered.
  - **Supplier Registered Seat** - If applicable to your country, specify the supplier organization's Registered Seat.
  - **Supplier Commercial Registration Number** - If applicable to your country, specify your organization's Commercial Registration Number that is entered with the country's Commercial Registry and the city where the supplier organization is registered. If configured, this value will populate sales invoices from the supplier profile and also display on the buyer's invoice view.
- **Business Information:**
  - **Supplier Capital** - If applicable to your country, specify your Supplier Company Capital, i.e., the amount of the supplier's company capital or shared capital on an invoice. You must enter the correct 3-digit code of the corresponding currency next to the amount.
  - **Supplier Shareholders** - If applicable to your country, specify the Supplier Board Members / Shareholders. If configured, this value will populate sales invoices from the supplier profile and also display on the buyer's invoice view.

Invoice Fields

Invoices from the customer or provided to the customer (via a sales invoice in the Customer Branded Portal) may contain additional fields to support international requirements.

- Fields display only after the **Remit To** address is selected and saved.
  - The **Save** action triggers the fields to display based on the **Remit To Country** depending on which fields (if any) are configured to display for that country.
  - The country configuration also controls which of these fields is required (indicated with an asterisk).
  - Users will see a warning message if attempting to save with a blank required field, and an error if attempting to submit with a blank required field.

- Fields from the supplier profile, as described above, may display on a sales invoice, if configured by the buyer.
  - **Note**: A supplier's country of origin should always be aligned with the **Remit To Country** for tax compliance. The **Tax Identification Number** and **VAT Number** fields are editable if a supplier's country of origin does not match the **Remit To Country**, so that the values can be adjusted.
- **Regulatory Information** section:
  - **Supplier Legal Structure** - The Legal Structure value on the supplier profile is displayed here as read only. If there is no value from the supplier's profile, the field is a dropdown with appropriate legal structures available for selection (depending on customer configuration).
  - **Supplier Insolvency Status** - If applicable to your country, use this field to indicate if your organization has any financial insolvency or liquidation restrictions. Select an option from the drop-down list.
  - **Supply Date** - When VAT is entered, the Supply Date acts as the point at which tax is calculated. This is a line-only system field that is displayed for line items on sales invoices.
  - **Triangular Partner Name** - If applicable, this is the name of the entity receiving the product(s) in a triangular transaction.
  - **Triangular Partner Tax ID** - The VAT ID of the entity receiving the product(s) in a triangular transaction.
  - **Tax Description** - Displays the tax description from the user-defined tax code field on the customer's purchase order. This field is also displayed on the **Edit Line Item** overlay in the TS&H section (see below).
- **DTSH (Discounts, Tax, Shipping and Handling) Information** section:
  - **Tax Description** - Displays the tax description from the user-defined tax code field on the customer's purchase order. In this section, the field displays at the header and line level and can be edited by suppliers in the **Edit Line Item** overlay on PO and non-PO sales invoices while the sales invoice in draft status.
    - **Modify By** - This field displays for you to select to determine how to modify taxes, either by **Tax Amount** or **Tax Rate**. This field is line level only, and only one option can be selected. The options are available as per the buyer's configurations. Select **Edit** for the line. The **Taxable** option should be **Yes**.
      - **Amount** - If selected, the user can input amounts in Tax 1 and Tax 2 fields, and the Tax Rate will automatically be determined based on the extended price of the line item.
        - The Tax Rate becomes read only, and is determined by Extended Price on the line divided by the Tax amount.
        - The Tax Rate will change if any of the following is modified at the line level: Quantity, Unit Price, Discount
      - **Tax Rate** - If selected, the user can input the Tax Rate in the Tax 1 and Tax 2 fields and the Tax Amount will automatically be determined based on the extended price of the line item.

        - The Tax Amount field becomes read only, and is determined by Extended Price on the line multiplied by the Tax Rate.
        - The Tax Amount will change if any of the following is modified at the line level: Quantity, Unit Price, Discount.
    - **Shipping and Handling Tax** - Four fields are available at the line level to add tax amount and tax rate on Shipping and Handling amounts:
        - Shipping Tax
        - Shipping Rate
        - Handling Tax
        - Handling Rate
        - Total Shipping and Handling amounts will also consider any Shipping and Handling amounts that are added at the Header level. Header level shipping and handling amounts inherit to the line level based.
    - **For Non-PO Invoices** - When adding line details, select the option to **Enter Line Item Tax, Shipping and Handling** to edit tax calculations.
- **Tax Declaration in Buyer Currency** field displayed on invoices only if the currency on the invoice document is *different* than the currency of the country on the buyer's Billing Address.
    - The field shows the invoice document currency, the currency that the tax amounts will be converted TO (based on the buyer organization's bill to address country), plus the exchange rate that will be applied to the tax amounts on the invoice. For example, "USD to EUR Exchange Rate 0.908389". **Note:** The default exchange rate displayed is the supplier portal currency configuration rate, not the currency configuration rate from the buyer's organization.
    - While an invoice is in DRAFT status, suppliers can edit the currency exchange rate for the tax amount on the buyer's Bill To address. The edited exchange rate value (or default if not edited) transfers over to the buyer invoice in the client organization.

For Global Invoicing, a supplier's country of origin should always be aligned with the Remit To address country for tax compliancy. To meet this requirement, we have made the **Tax Identification Number** and **VAT Number** fields editable on the buyer invoice if a supplier's country of origin does not match the Remit To address country, so that the values can be adjusted

CREATING AN INVOICE FOR A GLOBAL INVOICING CUSTOMER

Global Invoicing begins with a supplier completing a sales invoice and sending it to a **Global Invoicing** customer.

The system checks the **country** on the supplier's Remit To address and displays additional system fields and Global Invoicing fields in the **Regulatory Information** section in the header, which must be completed before the invoice can be sent to the customer.

- The supplier **Remit To** address is mandatory.
- While the invoice in **Draft** status, suppliers can change the **Remit To** address. If the supplier's **Remit To** country is changed, the corresponding eInvoicing fields will also change based on the buyer's configuration.

Once the invoice is submitted (sent to the customer), the invoice issuance process is initiated and the supplier-side invoice fields are no longer editable. The invoice is then issued (PDF generated) and may be digitally signed (depending on the buyer Bill To and supplier Remit To country settings). In the case that an invoice needs to be amended, the supplier can only void the invoice (to submit a new invoice) or submit a credit memo to correct the invoice amount.

Sales Invoice Workflow - Issuance Failure

If a sales invoice that has been submitted to a global invoicing customer fails issuance in workflow, the sales invoice returns to a Draft status and becomes editable again in the portal.

- The History records the issuance error.
- The supplier receives an email issuance failure email and notification.
- Suppliers can edit and resubmit the invoice.

Step-by-Step

1. Log into the Supplier Network Portal or the specific Customer Branded Portal.
2. Locate the **Create Invoice/Credit Memo** widget on the dashboard and complete these fields:
   - **Type** - Select Invoice.
   - **Invoice No** - Enter the invoice number.
   - **Invoice Date** - Populates with today's date
   - **Customer** - Select the Global Invoicing customer that you are creating a sales invoice for (if you are in the Network Portal. This field does not show in a Customer Branded Portal).
   - Select **PO** or **Non-PO**.
   - **Currency** - Select a currency for the invoice.
3. Click **Create**.
4. Select the **Country** of the **Remit To** address, then click **Save**. As soon as the country is selected, the country specific Invoicing fields are displayed. Any specific country eInvoicing fields are not displayed until a Remit To address is selected.
5. Complete all required Invoicing fields.
6. Click **Send to Customer**. The eInvoice issuance process has now started and the invoice is locked

for editing.

7. Once the issuance process has completed, a link to the electronic invoice (eInvoice PDF) will appear for the supplier user to download.

CREATING A CREDIT MEMO FOR A GLOBAL INVOICING CUSTOMER

For Global Invoicing customers, a credit memo must be created from an invoice. When a credit memo is created, the system will copy the invoice with a negative amount. The invoice and credit memo are linked in database and the **Related Invoice Number** field shows the number of the invoice that the credit memo was created from.

Status requirements for Global Invoicing credit memos:

- A credit memo **cannot be created** from an invoice in the following statuses: Draft, Rejected/cancelled.
- A credit memo **can be created** from an invoice in any of the following statuses: In Progress, Paid, Payable, Dispute, Pending workflow, Completed workflow.

The following information is copied or not copied from invoices to credit memos:

- **Copied from invoice to credit memo**: All header information, Service Start Date, Service End Date.
- **Not copied from invoice to credit memo**: Attachments, Comments, Credit Memo date, Create Date, Issue Date, Payment Date

A validation prevents creation of a credit memo in association with an invoice when the sub-total of all credit memos associated with that invoice exceeds the Grand Total amount of the invoice.

Note: For Global Invoicing customers, you will not have the ability to create credit memos apart from invoices. You will not be able to create other items involving credited amounts such as discount vouchers, which may not be recognized as credit memos in some countries.

Step-by-Step

The **Create Non-PO Invoice/Credit Memo** (for non-PO invoices) permission, or the **Create PO Invoice/Credit Memo** permission (for PO invoices) is needed to create a credit memo.

Create a credit memo from an invoice on widget

1. On the dashboard, open the **Create Invoice/Credit Memo** widget.
2. Complete these fields:
   - **Type** - Select Credit Memo.
   - **Invoice Date** - Enter the date of the invoice.
   - **Customer** - Select a customer that has a global invoicing license (if utilizing the Network Portal widget; this option does not appear in the Customer Branded Portal).
   - **Create From** - The **Related Invoice Number** is automatically selected.
3. Click **Next.** A window shows all available invoices.
4. Click **Select** next to the invoice to create a credit memo in the portal.
5. Edit fields and click **Save** or **Send to Customer**. When you click Send to Customer, a credit memo is created in the customer organization.

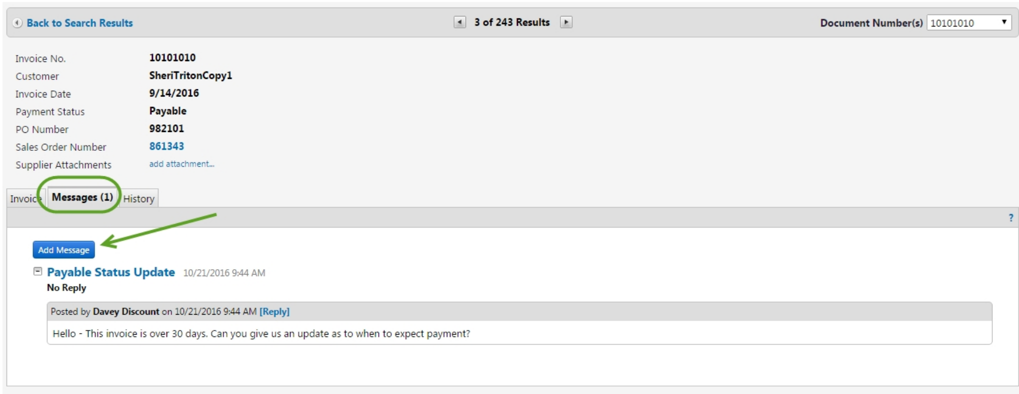
Create a credit memo from an invoice under Available Actions

1. Navigate to **Orders** **> Search > Invoices** to search for and open the invoice.
2. Click **Available Actions** and select **Create Credit Memo**.
3. Click **Go**. The credit memo is created and can be edited, saved and sent to customer. When sent to customer, a credit memo is created in the customer organization.

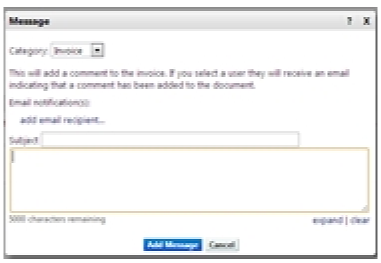
Sending and Receiving Invoice Messages

Suppliers who have been invited to view invoices can communicate with the customer directly from the invoice. You can send and receive messages related to the invoice, its payment status or other subjects. Supplier contact information will not be viewable by the organization in these messages. Only the supplier name is shown.

When viewing an invoice, you will see the **Messages** tab. Select the **Add Message** button to configure the message.



You may select a message category, add other internal users to the message, and enter a subject for the message. Enter the message text in the message field, and click the **Add Message** button. The message will be sent to the customer. You may select **Reply** to reply to a customer response.



Customer organizations can also send messages on an invoice. There are Notification Preferences available that allow for a user to be notified when a customer sends an invoice message:

- New Message from Customer - Payment
- New Message from Customer - Invoice
- New Message from Customer - Other

Note: The option to receive **Email & Notification** for these preferences are on by default for users with the **Create Sales Invoice/Credit Memos**, **View Sales Orders**, or **View All Sales Orders** permissions. However, the preference can be edited or disabled at the user level.

Step by Step

The goal of this task is to send messages from an invoice, and view message responses. It is assumed that a customer user has access to respond to the invoice messages.

1. Navigate to Orders > Sales Invoices > Search for Sales Invoices. See **Search Sales Invoices,** on page 170 for additional information.
2. Selecting the invoice number.
3. Click the **Add Message** button. The **Messages** dialog box will display.

4. Configure the message:
    a. Select the message category from the **Category** drop-down box. Available selections are **Invoice**, **Payment, Dispute** and **Other**. **Important Note**: Be sure to select the most meaningful category for your correspondence. Customers set up rules that route the messages to specific organization users based on the category. Making the category as precise as possible may mean a shorter turnaround time for a response.
    b. If you would like to notify an internal user that you have entered a message on the invoice, click the **add email recipient link** to search for and add a user.
    c. Enter a subject for the message in the **Subject** field.
    d. Enter the message text in the message field. There is a maximum of 5000 characters.
5. When you have finished configuring the message, click the **Add Message** button. The message will be sent to the purchasing organization.
6. Review message responses:
    a. When an organization responds to an invoice message, the user who originally sent the message will be notified that a response has been submitted. In addition, any user who was copied on the original message will receive email notification.
    b. Locate the invoice and click on the **messages** tab.
    c. The organization's response will display below your original message.

Invoice Status Notifications

When a supplier submits an invoice to a customer through the Supplier Network Portal and the invoice is subsequently rejected or disputed by the customer, the supplier can receive an email and/or notification about the action and reason.

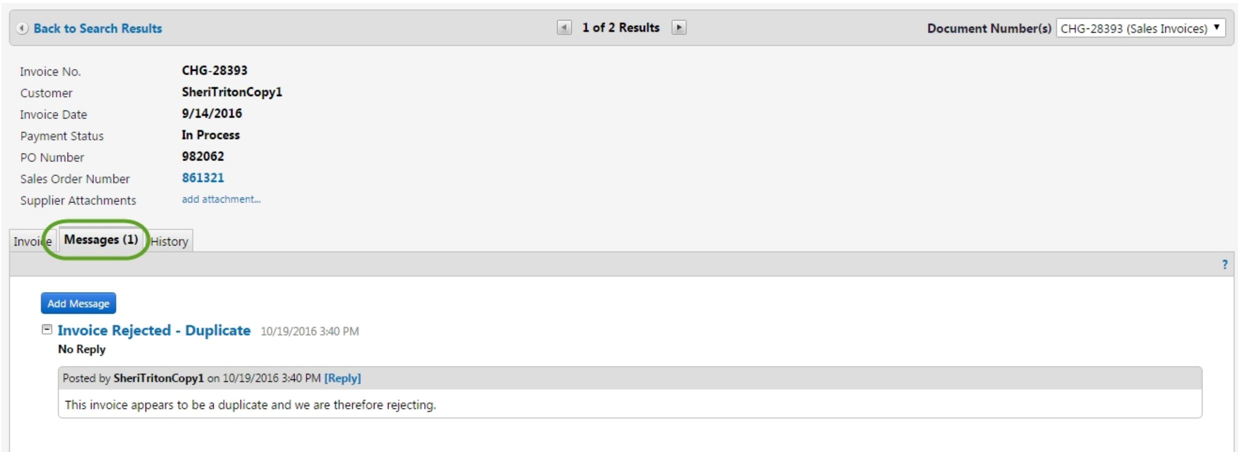
The Invoice Cancel/Reject Notification should be enabled if a user would like to receive an email or an in-application notification when a customer cancels/rejects a portal invoices.

The Invoice Dispute Notification should be enabled if a user would like to receive an email or an in-application notification when a customer sets a portal invoice status as Dispute. **Note**: The option to receive **Email & Notification** for this preference is on by default for users with the **Create Sales Invoice/Credit Memos**, **View Sales Orders**, or **View All Sales Orders** permissions. However, the option can be edited or disabled at the user level.

Note: Users will **automatically** receive a message for portal invoices they submitted that are canceled/rejected by JAGGAER Invoicing customers, regardless of any notification preference.

Notification preferences are managed in your User Profile. Contact an administrator if you don't have access to your User Profile or Notification Preferences.

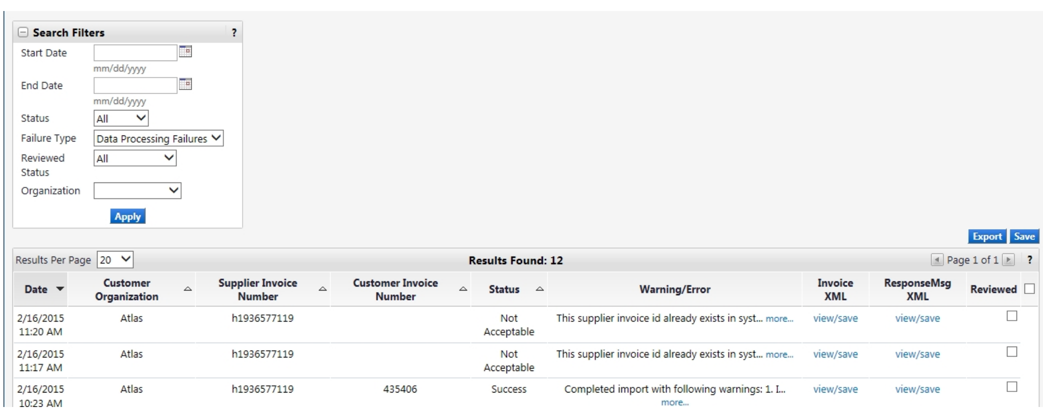
Following is a message displayed on the invoice when a customer rejected a portal-submitted invoice to the supplier.



cXML Invoice Import History

Suppliers who send cXML invoices asynchronously (not at a scheduled time) can view the status of those invoices in the JAGGAER ONE Supplier Network. Access the **cXML Invoice Import History** page via **Orders > Sales Invoices** to see if the invoice was sent successfully, failed, or was not accepted. A user must have the **View cXML Invoice Import History** permission to view this page.

Users can view invoices by the status, failure type, reviewed status and organization. A **Reviewed** checkbox is available to indicate those invoices you have reviewed and can then filter out of the history results. You may also choose to **Export** the results to a CSV file.



The cXML Invoice Import History can be viewed by any of the following search criteria:

- **Start Date** and **End Date** - View invoice history within a certain date range.
- **Failure Type** - Import Failures, Data Processing Failures, or All. This filter shows if the **Status** selection is **All** or **Failure**.

- **Reviewed Status** - Reviewed, Not Reviewed, or All
- **Organization** - Filter by the organization being invoiced

Import Failures are those that prevented the system from receiving the import document. **Data Processing Failures** are those that occurred after the system accepted and started processing the data. It is possible that the error could occur a significant amount of time after the file was successfully received.

To indicate you have reviewed an invoice history message, select the **Reviewed** checkbox for the appropriate invoice, and select **Save**.

SITE SETUP AND ADMINISTRATIVE TASKS

The purpose of this lesson is to provide instructions on miscellaneous system administration tasks.

SITE SETUP AND ADMINISTRATIVE TASKS

The Supplier Network includes several administrative features. Suppliers can manage roles for users within their Supplier Network, as well as configure settings for the document search filters.

Managing User Roles

The JAGGAER ONE Supplier Network Portal is configured with standard roles that have specific permissions enabled for that role. You may override the role permissions for a user by specifically enabling/disabling a user's permissions. You may also choose to edit the pre-configured roles, make a role inactive, or create new roles specific to your organization needs. For example, you may want the **Manage Content / Pricing** role to have a permission that is not currently configured for that role. You would edit the role to include that permission. As a result, all users with that role would now have the new permission.

Important: Be cautious when creating new roles because they cannot be deleted. They can be made inactive.

Step by Step

The goal of this task is to edit an existing role and create a new role in the JAGGAER ONE Supplier Network Portal.

1. Go to **Setup** > **Organization Structure and Settings** > **Manage User Roles**. The **Manage User Roles** page displays, with User Roles listed in the left panel.
2. To make a role the new default role:
    a. Select the **Actions** dropdown and click **Choose New Default Role**.
    b. Select from the listed roles and click **Save Changes**.
3. To create a new role, select the **Actions** dropdown and click **Create New Role**. The Create New Role wizard displays.
    a. Enter a **Name** for the role.
    b. Make a selection for **Level**:
        i. **Create new top level role** - will not inherit any settings from any other role. The Role will be at the top level in the role hierarchy.
        ii. **Create new child role** - you will use an existing role and 'copy' the role settings to your new role, which will create a child role under the selected role in the hierarchy.

c. Click **Create Role**.

d. The page is refreshed on the **About This Role** page for the new Role. The role is inactive by default. Proceed with edits as detailed below.

4. To modify or review an existing role, select the role from the left panel and the role information will display.

5. At anytime to see the list of roles, select the **Show Roles** button. Select the **Hide Roles** button to hide the tree.

6. Configure the role settings as follows:

   a. Select the **About This Role** page:

      - The **Role Name** may be edited if appropriate.
      - Enter an optional **Description** for the role.
      - Select Yes to make the role **Active** when you are ready to assign the role to users.
      - Click **Save Changes** when done editing Role Properties.

   b. Select the **Permissions** page, and then the appropriate type of permission (Orders, Administration, Supplier Portal).

      - The current setting for the permission is shown.
      - Select **Edit Section** hyperlink to change the setting for permissions in each section and set the permission explicitly for the role.
      - Select to **Set to Always ON** or **Set to Always OFF**, and click to **Save Changes.**

   c. Select the **Notification Preferences** page.

      - The current settings for the notification preferences are shown.
      - Select **Edit Section** hyperlink to change the setting for the notification preference for this role.
      - Select **Override**.
      - Select the appropriate setting: **None**, **Email**, **Notification**, or **Email & Notification**. Click **Save Changes**.

7. Refer to the **History** tab for an audit log of changes to roles.

Document Search Settings and Filters

You may configure how your Document Search filters are displayed and ordered in your Supplier Network Portal. Navigate to **Setup > Site Appearance and Behavior > Document Search Settings and Filters > Document Search Admin**. You may configure if a particular filter is visible or not, and drag/drop the order you want filters to display in document search results.

Step by Step

The goal of this task is to edit Document Search and Filter settings in the Supplier Network.

1. Go to **Setup** > **Site Appearance and Behavior** > **Document Search Settings and Filters**. The **Document Search Admin** screen will display.
2. The **All Documents** section contains post-search filter criteria that is available for all document types. The other sections contain the post-search filtering criteria for that specific document type (Sales Orders or Sales Invoices). By default, all filter options are available.
3. To make a filter option visible or not visible: Disable the **Visible** checkbox if you do not want a section to display. If checked, filter type will display, if applicable for the search performed.
4. To change the order of the filter options, click on the filter line and drag it to the appropriate area or use the down and up arrows. This option allows you to put the filter options you feel are most important to your organization at the top of the filter criteria.
5. Click the **Save Changes** button.
6. A **History** tab captures changes made to the document search settings.

REPORTING

REPORTING FROM THE SUPPLIER NETWORK

In addition to the reporting information available from the Document Search results, reports are available through the Reporting menu of the Supplier Network Portal.

Reporting Options

The Supplier Network Portal allows you to run three distinct types of reports. These are **Transaction Reports**, **Catalog Reports** and **Product Counts** Reports. Information on each of these reports is detailed in the Help text for each section. All reports may be exported in a .csv file format.

Some customers may request 2nd Tier diversity reporting from your supplier organization. This concept and related exercises are located in the Second Tier Reporting section.

Transaction Reports

Transaction reports allow you to view both Purchase Requisition (PR) and Purchase Order (PO) spend for customers that are accessing your hosted or punch-out catalog. You may choose to view the summarized Dashboard report, or details for PRs or POs. You may choose a predefined date range from the drop down menu, or customize a date range to view information.

There are two distinct differences between the PR and the PO reports:

- Not all PRs are approved and turned into POs
- JAGGAER does not create and deliver POs for some customers. Some customers use a separate ERP system to generate POs; PO spend will not be reflected in the Supplier Network for those customers.

The PR and PO reports will show a breakdown of spend per specific customer for those customers that have elected to display this information to you via the portal. If customers have opted to not make their transaction data available to you at a customer-specific level, their spend will be lumped into a customer line labeled **Other**.

Details for each of the report options is detailed in the **Help** text provided in the Supplier Network.

Catalog and Price Reports

Catalog and price reports provide information on pricing status, enablements and relationships with customer organizations. Select a report from the dropdown and click **Generate Report** to see results.

You can export report information to an Excel file by selecting the **Export CSV** button. Also, click the print icon to print the report as it displays.

LIST PRICE SUMMARY

This report displays the total number of products you have stored in the database at list price and the last date the products and prices were updated.

PRIVATE PRICING SUMMARY

This report displays a list of customers that are viewing special or discounted pricing for your products. This report includes:

- Customer name
- Price set name in parentheses
- The number of products the customer views at a special price
- The last time pricing was updated for the customer

ENABLED ORGANIZATION SUMMARY

This report provides a summary of what customers are accessing your catalog. The report includes the following information:

- Customer name
- Price set name in parentheses
- Indication if the customer has your catalog enabled for end users
- Indication if have special pricing loaded for the customer
- Indication if the customer is accessing a punch-out instance of your catalog
- The order distribution method the customer utilizes (some customers utilize separate systems for actually ordering products; “N/A” indicates that the customer utilizes a separate system for ordering and therefore orders are not processed through the JAGGAER application)

ENABLEMENT COMBINATION SUMMARY

This report contains enablement relationship details of active or deactivated integration points. The report provides the supplier with the relationship and enablement information they need to contact the appropriate customers when different components of their platforms change and testing is required. Information includes:

- Supplier Name
- Buying Organization (Price Set Name) - This is the customer's internal organization name in teh system.

- Supplier/Customer Relationship Status - A green check indicates the relationship is active. A red check indicates the relationship is not active.
- Enablement - The type of enablement for the relationship.
- Status - This is the specific enablement status.
- Supplier Active for Shopping - Indication if the customer has enabled the supplier for shopping in their organization.
- Order Distribution - The method in which orders are delivered from the customer to the supplier.

ENABLEMENT DETAILS

This report provides a summary of customer enablements that have been requested or that have been completed. The report includes the following information:

- Customer name
- Price set name in parentheses
- Type of enablement (hosted, punch-out, cXML PO)
- Status of enablement (Requested/Complete)

ENABLEMENT DETAIL SUMMARY

This report calculates the information in the Enablement Details report. The report shows the number of hosted, cXML po, and punch-out enablements for your organization. There is also a calculation of how many of which are complete, in process, and requested.

Product Counts Summary

This report displays every organization that is viewing your products. This report includes any customer training sites that may have sample data loaded for testing purposes, as well as JAGGAER sites used for demonstration purposes. If you have questions about any organization listed, please contact JAGGAER Support. The report includes:

- Supplier Catalog Name (Supplier ID)
- Buyer Name (Customer ID)
- Relationship Active - If the customer has specifically requested a type of enablement for the catalog, this value will be “Yes”, otherwise “No.”
- Hosted Enablement – The status of a specifically requested hosted enablement for the customer.
- PunchOut Enablement - The status of a specifically requested punch-out enablement for the customer.
- Viewable Products – the total number of products the customer has available to their end users
- Public Products – the number of products the customer has available by viewing the list price loaded for that item (Science Catalog suppliers only)
- Private Products – the number of products the customer has available by viewing specific pricing loaded for those products.

- Consortium Products – the number of products available via consortium to participating customers.
- Proxy Products - the number of live-price or Level 2 punchout products available with proxy prices.
- Currency – the currency for the organization and list price for that row.
- Buyer Prices Updated – the last date that specific pricing for the customer was provided.
- Products Updated – the last date that content was updated (not customer specific).
- Public Prices Updated – the last date that list prices were updated for the currency indicated on that row.

2ND TIER REPORTING

SECOND TIER REPORTING

Many customer organizations have detailed reporting requirements for diverse spend from their suppliers. Some suppliers may not meet diverse requirements themselves, but do business with suppliers that are diverse. The suppliers that you work with to provide your services to the customer are called **2nd Tier** suppliers. A customer will enable your supplier account as a **Prime** supplier, therefore allowing you to enter 2nd tier suppliers and report spending through your supplier portal.

2nd Tier Reporting Basics

If an organization has enabled your supplier account as a **Prime** supplier, you will have access to the **2nd Tier Reporting** widget and menu in the customer portal. You can also navigate to 2nd Tier Report via the left menu navigation.

With 2nd Tier Reporting, you will have access to enter data into the customer's defined reporting periods, as well as see a history of reports and export the data for your records.

TYPES OF INFORMATION TO REPORT

Different customers will have different requirements for the information they want suppliers to report. Customers can select which diversity classifications should be reported, and configure required documentation to be provided as well. Customers can also indicate if they want you to include indirect spend or direct spend only.

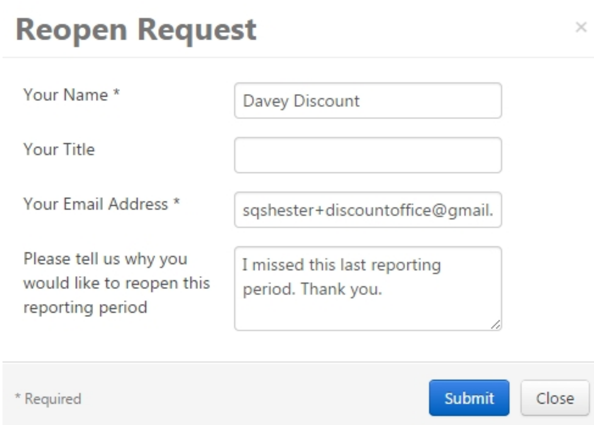
REQUIREMENTS

- The customer must have you indicated as a **Prime** supplier in their organization.
- The customer must have defined reporting periods and indicated a period is open. A supplier may request that a reporting period be reopened.
- A supplier user must have permission to Manage 2nd Tier Reporting (located under Administration permissions in the user profile).

REOPEN REQUESTS

If a reporting period has passed, a supplier may request to reopen the reporting period so they can report spend. An example may be if the supplier was recently added as a prime supplier, and needs to report spend on the previous reporting period. In the list of **Closed Reporting Period** on the **Report 2nd Tier Data** page, click the button to **Request Reopen**.

When you select to **Request Reopen**, you will be given an overlay to confirm you name and email address, provide your title, and describe why you want the customer to reopen the reporting period. Click **Submit** to send your request to the customer. The reporting period is now shown on the **Report 2nd Tier Data** page with a **Reopen Request Date**. If the customer approves your reopen request, you will be given the opportunity to enter spend data.



REPORTING NOTIFICATION PREFERENCES

Supplier users can subscribe to notification preferences that are sent from customer organization in accordance with a customer's reporting period deadlines. Suppliers may also choose to receive notification when a reopen request has been rejected, or when reporting data has been deleted by the customer because of a change in the data configuration. See the Notification Preferences section for details.

Report 2nd Tier Data

On the Report 2nd Tier Data page, you can see reporting periods that the customer has opened for you to enter information. Click the **Report** button to begin entering. Depending on the customer's configuration, you will be guided through pages where you can provide spend information.

A customer has the option of entering helpful information available at an **FAQ** link located on each of the 2nd Tier Reporting pages. Selecting the **History** link shows a log of changes to the spend data.

SUPPLIER INFORMATION AND DIRECT SPEND

On the **Direct Spend** page, you will enter your 2nd tier suppliers to be included in the report. You can do this individually through a wizard, or in bulk via an import file. See Adding and Managing Suppliers for 2nd Tier Reporting for more information.

- To enter manually, select the **Enter Supplier Data** button, and then select **Add a New Supplier to this Report.** Enter the information for the supplier, noting that required fields are indicated with a star (★). and following the instructions,
- To import a list of suppliers, select the **Enter Supplier Data** button, and then select **Import**. If you need the import template, select **Get Import Template** and choose if you want a blank template or one populated with suppliers already existing for the report. You can also export the current list of suppliers in the report by selecting the **Export Suppliers** button. Import and export files are available on the **2nd Tier Reporting > Export & Import** page in the customer portal. See Export and Import Results for more information.

Once you have loaded suppliers, you will see them listed on the page. You can enter direct spend for each supplier on the page. Use the **Filter supplier list** link to modify the list that is displayed.

INDIRECT SPEND

If the customer indicates you may enter indirect spend, you will see the **Indirect Spend** page. First you will select if you have any indirect spend to report for this period. If **No**, no further action is needed and you can proceed to the next section.

If you indicate **Yes**, the customer's configured diversity classifications will show so that the user can enter the appropriate spend amount for each classification. Because diversity classifications are configured by each customer, the list on this page may vary.

REVENUE INFORMATION

On the **Revenue Information** page, you will enter the invoice amount to the customer for the time period, as well as your total revenues for that period.

SUMMARY OF SPEND AND REVENUE

On this page, you will see a summary of the information you have entered, and calculated values based on those amounts. You have the opportunity to make corrections to your reported data before proceeding to submit the information to the customer.

CERTIFY AND SUBMIT

Once you have entered all of the necessary information for the reporting period, you can certify and submit your data. The option to submit will not be available if any required information has not been completed. Complete the information requested on the page. Required information is indicated with a star (★). Click the option to certify that the information is complete, and click **Submit**. You will receive a confirmation that the report data has been submitted.

Step by Step

The goal of this task is to enter 2nd tier spend information for a customer's reporting period.

1. Go to **2nd Tier Reporting > Report 2nd Tier Data.** Select the **Report** button for an open reporting period.
2. Enter **Direct Spend**.
    a. If no suppliers are listed, add suppliers. See Adding and Managing Suppliers for more information.
    b. Enter the direct spend amount for appropriate suppliers.
    c. When finished, click **Proceed to Indirect Spend** (or next step configured by customer).
3. Enter **Indirect Spend**.
    a. Select if you have indirect spend to report for this reporting period. If No, proceed to the next step.
    b. If Yes, enter spend values for the appropriate diversity classifications.
    c. When finished, click **Proceed to Revenue Information** (or next step configured by customer).
4. Enter **Revenue Information**.
    a. Enter the amount your company invoiced the customer during the reporting period.
    b. Enter your company's total revenue for the reporting period.
    c. When finished, click **Proceed to Summary of Spend and Revenue.**
5. Review the values and calculations on the **Summary of Spend and Revenue** page.
    a. Make edits as needed by navigating to the appropriate section.
    b. When finished with all edits and the values/calculations have been confirmed, select to **Proceed to Certify and Submit.** Or, select the **Certify and Submit** page from the left navigation.
6. Select to **Certify and Submit** your 2nd tier spend data for this reporting period.
    a. The option to certify and submit will not be available if any required information is not completed.
    b. Enter the required information on the page.
    c. Select to **certify that the information is true and accurate**.
    d. Click the **Submit** button.
7. The page refreshes with confirmation that the data has been submitted.
8. You can review the history of data submitted by navigating to the **Reporting History** page.

Adding and Managing Suppliers for 2nd Tier Reporting

To report direct spend data, you will need to add the appropriate suppliers to the spend report. You can add suppliers in the application manually or via import. You can also export suppliers.

Note: This action is only available within a customer portal

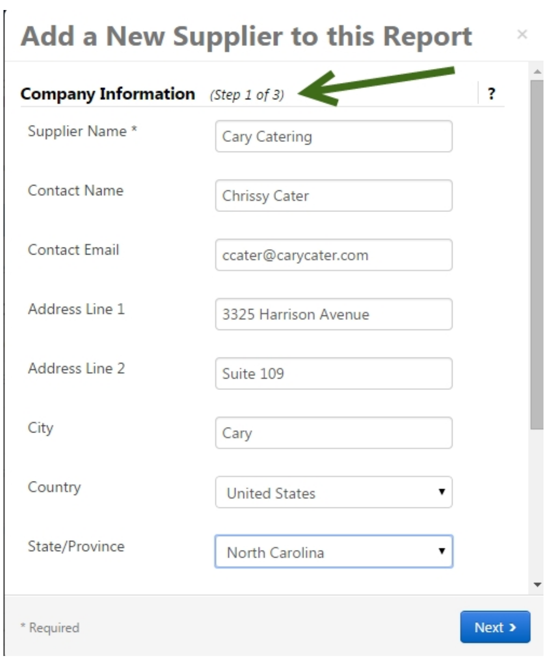
You will enter supplier data as you are providing the **Direct Spend** for a report. Navigate to the **2nd Tier reporting > Report 2nd Tier Data** page, review the **Welcome** message provided by the customer, and proceed to the **Direct Spend** page to add or manage suppliers for the particular reporting period.

By default, the page will display suppliers you have already loaded for a customer. Click the **filter supplier list** hyperlink to see options for searching for suppliers by name, or choose to only show suppliers with direct spend for the reporting period, those without diversity information, or all suppliers you have loaded for all customers. **Actions** are available to edit or delete the supplier and direct spend information.

Adding Suppliers Individually

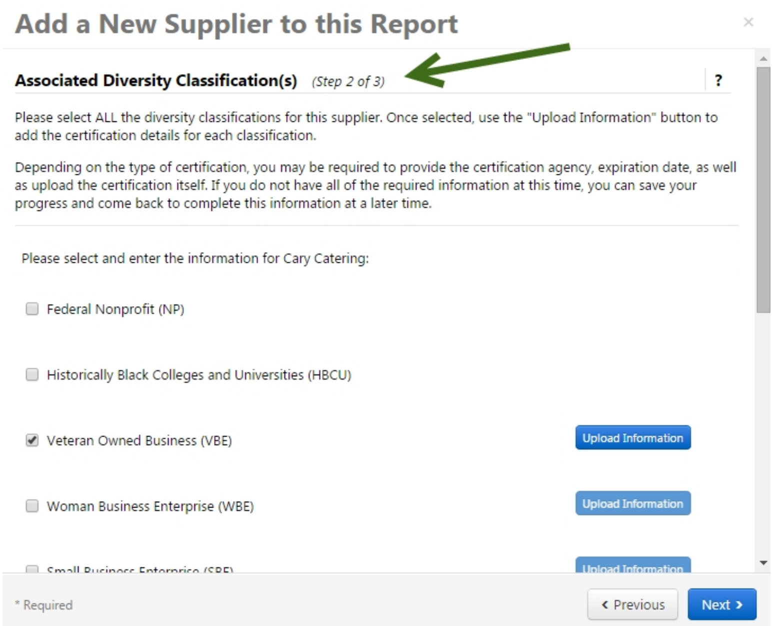
To enter manually, select the **Enter Supplier Data** button on the **Direct Spend** page for the reporting period. Select **Add a New Supplier to this Report.** A wizard will guide you through entering information for the supplier. Note that required fields are indicated with a star (★).

Adding a supplier - Step 1 of 3



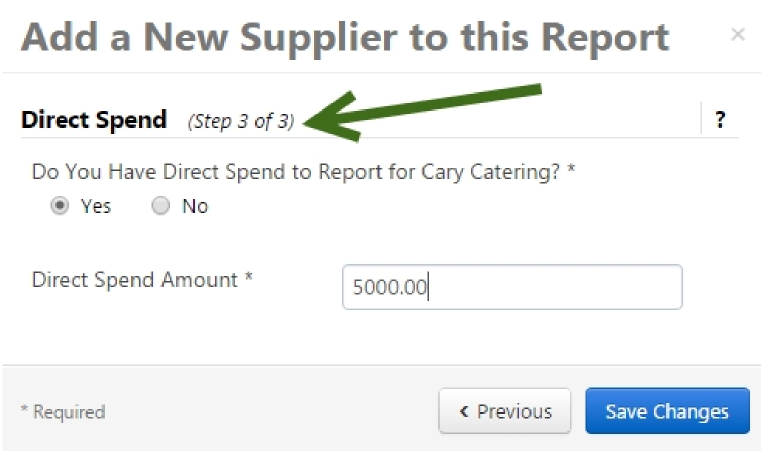
As you are entering supplier data, the second step is to select the appropriate Diversity Classifications that apply to this supplier. You will select from the classifications the customer has configured to include on the spend report, so not all classifications may be available, and the diversity classifications will vary by customer and spend report. You will have the option of uploading additional information, including certificates, for some types of classifications. If there are no diversity classifications for selection, contact the customer.

Adding a supplier - Step 2 of 3



The third step is simply indicating if you have direct spend to report for the added supplier at this time. Select Yes or No. If you select Yes, you will be prompted to enter the amount and then Save Changes to add the supplier and information to the report. If you select No, you can select to Save Changes and the supplier will be added to the report with no spend data. You can add in the spend information at any time.

Adding a supplier - Step 3 of 3



Step by Step

The goal of this task is to add suppliers individually in the UI for 2nd tier reporting to a customer.

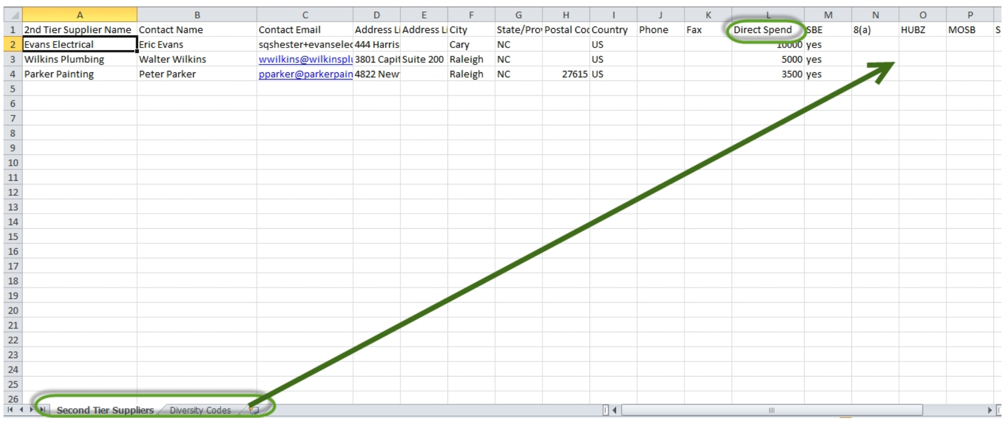
1. Go to **2nd Tier Reporting > Report 2nd Tier Data.** Select the **Report** button for an open reporting period.
2. On the **Direct Spend Page**, select the **Enter Supplier Data** button, and then select **Add a New Supplier to this Report.**
    a. In the overlay, enter appropriate information for the supplier. Required fields are indicated with a star. Click **Next**.
    b. Select the appropriate diversity classifications for this supplier. Diversity classifications display according to the customer's configuration settings. **Note**: The customer may request or require that certification information be provided if a classification is checked. When finished with diversity classifications, select **Next**.
    c. Select if you have **Direct Spend** to report for this supplier. If **Yes**, enter amount. If **No**, this action will simply update the supplier as an available supplier for 2nd tier reporting in the future. When an option is selected, click **Save Changes.**
3. The **Direct Spend** page refreshes with the supplier listed and any other information you provided.

Adding Suppliers Via Import

To add many suppliers to a spend report, you may want to use an import file. The information in the import file is the same information available when entering a new supplier through the UI. To ensure you have the correct format, you may want to select **Get Import Template** from the **Enter Supplier Data** dropdown on the **Direct Spend** page, and download either a blank template or one with existing suppliers populated.

Enter data in the fields as you would provide it in the application. Diversity Codes applicable to the customer's spend report are explained on the Diversity Codes tab in the spreadsheet.

Import Template with Supplier Information



After populating the file with the appropriate information and saving the file, select the **Enter Supplier Data** button on the **Direct Spend** page, and then select **Import.** Browse and choose the file name and click **Submit**. Once the file has processed, new suppliers will be added to the spend report.

Step by Step

The goal of this task is to add suppliers for 2nd tier reporting via import.

1. Go to **2nd Tier Reporting > Report 2nd Tier Data.** Select the **Report** button for an open reporting period.
2. Navigate to the **Direct Spend** page. You may have to confirm that you will enter spend information on the **Welcome** page in order to take action on other pages in the reporting period.
3. To download a template:
    a. If you need the import template, select the **Enter Supplier Data** button, and then select **Get Import Template** and choose if you want a blank template or one populated with suppliers already existing for the report.
    b. The blank template will be downloaded and you can open in Excel. If you chose to open a populated template, you can access the file from the **2nd Tier Reporting > Export & Import** page.
4. Populate the file:
    a. You may need to select **Enable Editing** for Excel to allow you to make edits in the spreadsheet.
    b. Enter the Supplier name, contact information, address information, and direct spend as appropriate.
    c. The diversity classifications you have allowed for 2nd tier reporting are displayed in separate columns. Enter "**yes**" in the column for classifications that apply to the

supplier.

d. Save the file in Excel format.

5. To import, select the **Enter Supplier Data** button, and then select **Import**. An overlay displays:
   a. Enter a description for the import.
   b. Browse and select the file. You may also choose **Export Now** to download a template if you have not already.
   c. Click **Submit**.
   d. The overlay closes, and a message indicates the import has been requested. You can click the **here** hyperlink to view the progress of the request, or click to **refresh** the page.
   e. After the import has completed, the imported suppliers display..
   f. For issues with the import, you may download the file on the **2nd Tier Reporting > Export & Import**.

Exporting Suppliers

You may choose to review the supplier information by selecting the **Export Suppliers** button. The file To export suppliers, select the **Export Suppliers** button and enter a description for the request. The export is provided as an Excel file in a zipped file format. The Excel file is the format required for importing.

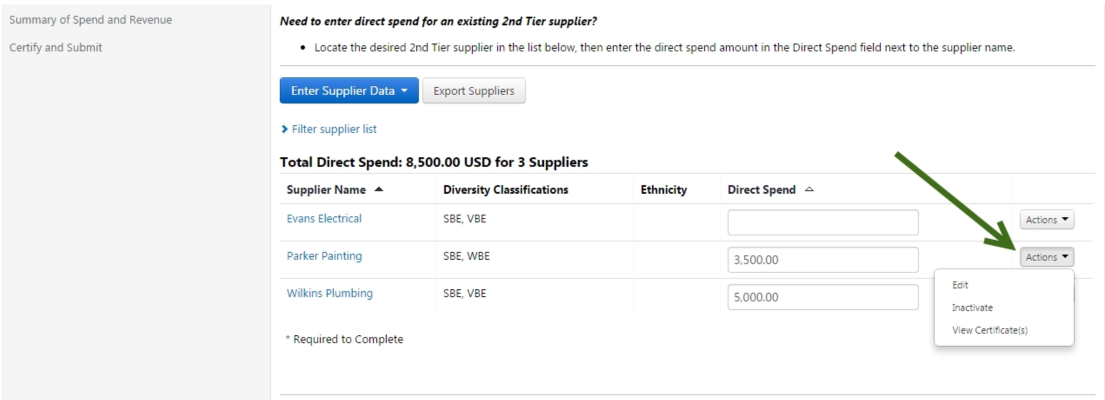
Step by Step

The goal of this task is to export suppliers that are provided in a customer's reporting.

1. Go to **2nd Tier Reporting > Report 2nd Tier Data.** Select the **Report** button for an open reporting period.
2. Navigate to the **Direct Spend** page. You may have to confirm that you will enter spend information on the **Welcome** page in order to take action on other pages in the reporting period.
3. To export the supplier list showing on the Direct Spend page, select the **Export Suppliers** button.
4. In the overlay, enter a Description for the export.
5. Click Submit.
6. The overlay closes, and a message indicates the import has been requested. You can click the **here** hyperlink to view the progress of the request, or click to **refresh** the page.
7. Navigate to the **2nd Tier Reporting > Export & Import** page, and select the **Exports** tab.
8. The status of the export request will show. Once it shows as **Completed**, you may select the File Name to download and open.

Editing Supplier Information

Once suppliers display for the spend report, you will see an **Actions** button available for each supplier. Select **Edit** from the **Actions** button to make edits to the supplier information. Select **Inactivate** to make this supplier no longer active for your organization's 2nd tier reports. Select **View Certificates** to see the diversity classifications uploaded by the supplier, if applicable.



Step by Step

The goal of this exercise is to edit or inactivate a supplier for a customer reporting period.

1. Go to **2nd Tier Reporting > Report 2nd Tier Data**. Select the **Report** button for an open reporting period.
2. On the Direct Spend page, note the supplier list.
3. To inactivate a supplier, select the **Actions** button dropdown, and click **Inactivate**. The supplier is made inactive and any direct spend associated for the reporting period is removed.
4. To reactivate a supplier, select the **Actions** button dropdown, and click **Reactivate**. You may enter direct spend for the reporting period.
5. To edit a supplier's information, select the **Actions** button dropdown, and select **Edit**. Make the appropriate changes to the supplier's information.
6. For a supplier that has certificate information associated, select the **Actions** button dropdown, and select **View Certificates** to download certificate information.

2nd Tier Data - Export and Import Results

2nd Tier data and supplier information can be downloaded from on the **2nd Tier Reporting > Export & Import** page. Results from export and import requests are displayed on separate tabs. To access a file on either tab, click the **File Name.**

EXPORTS

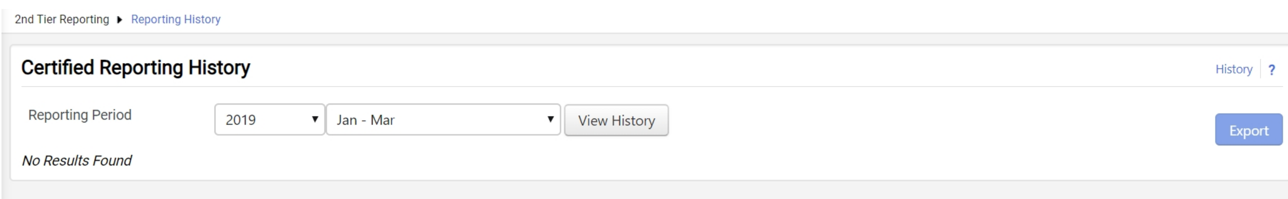
On the Exports tab, you can download export files you have requested. Note the status of the request, when it was requested and completed, total records, and the ability to delete the request/file. The **Second Tier Supplier Export Template** is available on this tab.

IMPORTS

On the Imports tab, you can download an error file associated with an import request. Note the status of the import, when it was requested/completed, total records in the file, and the details of the request, such as how many rows were imported successfully or with warnings. Delete the request from the page by selecting the **Delete** button.

Reporting History

You can view a history of the 2nd tier data you have submitted by navigating to the **2nd Tier Reporting > Reporting History** page.



Select a reporting period year, specific time period, and click the button to **View History**. The information submitted to the customer is displayed. You may choose to Export the report by clicking the **Export** button. The export will be available from the **2nd Tier Reporting > Export & Import** page.

APPENDIX

Supplier Profile Fields

Following is an explanation of the fields available for your organization's Network Profile in your JAGGAER ONE Supplier Network Portal. These fields are also available for customers to select for your completion in the customer registration profile.

Company Overview

Legal Company Name - The legal name under which your company does business. This field is required.

Doing Business As (DBA) - You may enter an **alternate** business name here. This name is an **alternate** name that you may be doing business as (or are commonly known as), but is **not** your Legal Company Name. **Note**: Please do not repeat the Legal Company Name in this field. If you do not use an alternate name, please leave this field blank.

Country of Origin - Select a country from the drop-down list that is your organization's country of origin for tax purposes. US Citizens and Permanent Residents should select "United States". The Country of Origin may determine the list of **Legal Structure** options available for selection.

Does your company have a DUNS number? - Select **Yes** or **No**. If **Yes**, the **Dun & Bradstreet Number (DUNS)** field displays.

Dun & Bradstreet Number (DUNS) - Enter your company's Dun & Bradstreet number.

Legal Structure - Select the appropriate legal structure for your organization. Note that this field will determine what type of Tax documents are available for your selection. **Note**: The list of legal structures may be determined by the selected **Country of Origin**.

Tax ID Number Type - This field only shows if you have selected **Individual/ Sole Proprietorship** as the Legal Structure. Select if your tax identification number is an **Employer Identification Number** or **Social Security Number / Social Insurance Number**.

Tax ID Number - Enter the appropriate tax identification number for your organization, either an Employer Identification Number of Social Security Number / Social Insurance Number. This value is validated based on the Country of Origin, Legal Structure and Tax ID Number Type selected.

- If the Country of Origin is Canada and the Legal Structure is Individual/Sole Proprietorship, the value is validated for a correct Social Insurance Number format.
- If the Country of Origin is a value other than Canada, this number must be 9 digits.
- Please note that Social Security Number is masked to users. Users with the appropriate permission to view the SSN may select a hyperlink to view the actual SSN value.
- This field will only be required if the supplier has selected a US-based legal structure. If a non-US based legal structure is selected, the TIN is not required. **US-based Legal Structures** include:

Individual/Sole Proprietor, C Corporation, S corporation, Partnership, Trust/Estate, LLC C corp, LLC S corp, LLC Partnership, Other. **Non-US Based Legal Structures** include: Non-US Based Entity, Foreign Individual.

VAT Registration Number - This field shows if the selected Country of Origin supports VAT Registration.

VAT Exempt - This field shows if the selected Country of Origin supports VAT Registration. Select to indicate if the organization is exempt from VAT registration.

Are you exempt from backup withholding? - Select Yes or No to indicate if your organization is exempt from backup withholding.

Backup Withholding Attachment - If you selected Yes as exempt from backup withholding, you may upload an attachment that supports your backup withholding status.

Website - Enter the URL for your company’s web page.

Supplier Tax Representative ID - Specify your organization's tax representative's Tax ID number in a text field. This is an option for supplier organizations that need to delegate the VAT tax payment to another legal entity because your organization is not a legal tax entity in the country to which you need to pay VAT.

Commercial Registered Court - Specify the district court or office where your organization is registered.

Supplier Registered Seat -Specify your Supplier Registered Seat.

Supplier Commercial Registration Number - Specify your Commercial Registration Number. This is the supplier organization's registration number that is entered with the country’s Commercial Registry and the city where the supplier is registered. This value will populate sales invoices from the supplier profile.

Business Details

Year established -Enter the year your organization was established.

Number of employees - Enter the number of employees for your organization. Please note this information (along with NAICS code and Annual Revenues) is used to calculate your Small Business Enterprise classification.

Business Details - Enter a description of your business, up to 2,500 characters.

Supplier Capital - Specify your Supplier Company Capital, i.e., the amount of the supplier's company capital or shared capital. You will also enter the correct 3-digit code of the corresponding currency next to the amount.

Supplier Shareholders - Specify the Supplier Board Members/Shareholders. This value will populate sales invoices from the supplier profile.

Annual Revenues/Receipts: Past 3 years - Select the appropriate **Currency** and enter your annual sales for the past three years. Please note this information (along with NAICS code and Number of Employees) is used to calculate your Small Business Enterprise classification.

Is Your Business a Local Supplier? - Select Yes or No.

Is Your Business a National Supplier? - Select Yes or No.

U.S. Service Area - If you serve one or more states or territories in the United States, select the **Edit** button and choose the appropriate values.

International Service Area - if you serve international territories, select the **Edit** button and choose the appropriate values.

NAICS Codes - NAICS stands for the North American Industry Classification System, which has industry-standard codes that describe the type of work you provide. Check the Edit button to choose from a list of codes. It is very important that you choose a code that most closely describes the products and/or services you provide. You may also select one or more **Secondary NAICS codes** as applicable.

- You must have a primary NAICS code to select any secondary NAICS codes.
- You may enter a keyword or code to search for the appropriate NAICS codes.
- You may remove codes by opening the search box and deselecting, or by selecting the trash icon next to the appropriate code.
- Please note this information (along with Annual Sales and Number of Employees) is used to calculate your Small Business Enterprise classification.
- Click here to navigate to an external website for additional information about NAICS Codes.

Keywords - Enter additional products and services information as keywords that reflect your company's products and services. These keywords are used when a buyer searches for a specific item and/or service while shopping.

Addresses

Address Label - Enter a label for the address. This name will display in the audit history log and to customers. This field is required to save the address, and can be edited at any time.

Address Type - Select the address type: Fulfillment Center, Physical, or Remittance. You may have multiple values for each type of address. This field is required to save the address, and **cannot be changed** once saved.

How would you like to receive purchase orders for this location? - This option is available **Fullfillment Center Address Types only**, and if your organization is not currently configured to transmit orders via cXML. Select the purchase order delivery method for this location: Email, Fax, Mail or Not Applicable. **Please note** that this does not determine the actual delivery of purchase orders for your organization. That is configured for each customer as part of the supplier enablement process These fields are for informational purposes only, and used by some customers to populate appropriate information in their external systems. When Email or Fax are selected, additional fields display:

- For Email selection, enter and confirm Email Address for purchase order delivery.
- For Fax selection, enter the fax number for purchase order delivery
- **Note**: A customer may determine what specific methods to display in the customer registration profile. You may not see all options.

Country - Select from the dropdown list of countries.

Address Lines 1-3 - Enter in the address on the appropriate lines.

City/Town - The city or town for the address.

State/Province - Depending on the country selection, you may have a dropdown list of states/provinces available. Or, enter in the appropriate value if none are provided.

Postal Code - The postal code for the address. The format is verified if the country selection is USA or Canada. **Note** that in the customer registration profile, a specific zip code format may be required.

Phone - The main telephone number for this address, including country code, area code, phone number and extension if applicable.

Toll Free Phone - Enter a toll-free number for this address, if applicable.

Fax - Enter the main fax number for this address.

Primary - Displays **Yes** and **No** radio buttons. **Yes** is selected if the address is the primary address for the address type. **No** is selected if the address is not the primary for the address type. If you would like to make a different address the primary, select the **Yes** radio button for that address, and the primary indication will be removed from the previous address indicated as primary.

Contacts

Contact Label - Enter a label for the contact. This label will display in the audit history log and to customers. This is different than the contact first name and last name, but can be that value if appropriate. You may want the value to be "Stockroom Catalog Contact", for example. This field is required to save the contact, and can be edited at any time.

Contact Type - Select the contact type. Select from: Catalog, Corporate, Customer Care, Diversity, Fulfillment, PO Failure, Remittance, Sales, Technical or Other. You may have multiple values for each contact type. This value is required to save the address and **cannot be changed** once saved.

First Name - The contact's first name.

Last Name - The contact's last name.

Position Title - The contact's title.

Email - The contact's email address.

Phone - The contact's phone number, including country code, area code, phone number and extension if applicable.

Toll Free Phone - If the contact can be reached via a toll free number, enter the value, including an extension if applicable.

Fax - The fax number for the contact.

Primary - Displays **Yes** and **No** radio buttons. **Yes** is selected if the contact is the primary contact for the contact type. **No** is selected if the contact is not the primary for the contact type. If you would like to make a different contact the primary, select the **Yes** radio button for that contact, and the primary indication will be removed from the previous contact indicated as primary

Associated Address - Once the contact is saved, you may associate an address for the contact. Select the **Manage Associated Addresses** from the **Edit** button drop-down to see available addresses. You may associate one address with a contact.

Locations

Location Label - Enter the Location Label. This value is displayed in the audit history log. This field is required to save the location and can be edited at any time.

Location Type - Select from the available Location Types: Headquarters, Fulfillment Center, or Other. This field is required to save the location and can be edited at any time.

Primary - Displays **Yes** if the location is the primary location for the location type. Displays a radio button selection for **No** if the location is not the primary for the location type. If you would like to make a different location the primary, select the **Yes** radio button for that location, and the primary indication will be removed from the previous location indicated as primary.

Location Description - Enter a description for the location, if appropriate, up to 700 characters.

Effective Date - Enter the effective date for this location.

Assigned Addresses - You may associate multiple addresses with the location. Select the **Edit** button, and select from the available active addresses. You may select one address from each address type. To remove an associated address from the Location, select the **Remove** icon.

Assigned Contacts - You may associate multiple contacts with the location. Select the **Edit** button, and select from the available active contacts. You may select one contact from each contact type. To remove an associated contact from the Location, select the **Remove** icon.

Diversity Information

Does your Business Quality as a Diverse Supplier? - This option appears if configured by the customer. Select **Yes** to proceed with selecting diversity classifications. Select **No** or **Decline to Answer** if appropriate. If there are any existing diversity classifications indicated, they will be removed upon your confirmation of **No** or **Decline to Answer** selections. If **Yes** is selected, the option to **Add Diversity Classification** will show.

Add Diversity Classifications - To add a diversity classification(s), click the **Add Diversity Classifications** button. An overlay displays with all available **Federal Diversity Classifications**, **State Diversity Classifications** or **Other Diversity Classifications**.

Diversity Name - The Diversity Name is populated with the Diversity Classification selection made when selecting **Add Diversity Classifications**. This field is not editable.

Some diversity classifications have additional options available once added:

Are you certified by a certifying agency? - Available for some classifications. If appropriate, indicate your organization is certified by a certifying agency for the selected diversity classification.

Certification Type - If you answered 'yes' to being certified, you may have the option of selecting the certification type, depending on the diversity classification. Select from the available options and/or enter the appropriate value

Certifying Agency - If you answered 'yes' to being certified, you may have the option of entering a certifying agency.

Expiration Date - If you answered 'yes' to being certified, you may have the option of entering an Expiration Date for this classification certification.

Certification Number - If you answered 'yes' to being certified, you may have the option of entering your Certification Number for this classification.

Upload Certificate - If you answered 'yes' to being certified, you may have the option of uploading a copy of the classification certificate. You can drag and drop the file into the gray area next to **Select file**, or click the **Select file** button to choose the appropriate file from your computer or device.

Some other classification-specific information may be available.

Insurance Information

Insurance Type - Select the type of insurance from the dropdown list. This field is required an cannot be changed once saved. If an Insurance Type is not listed, select **Other** to enter a text value.

Other Insurance Type - If Other is selected as the Insurance Type, this field displays for you to enter another type of insurance. This field is required if Other is selected, but can be edited at any time.

Policy Number - Enter the policy number for this insurance record.

Insurance Limit - Select from the ranges for the Insurance limit: $500,000 or less; $500,001 to $1,000,000; $1,000,001 to $2,000,000; or More than $2,000,000. This value is required to save the insurance record and can be edited at any time.

Expiration Date - Select the expiration date for the insurance record/policy.

Insurance Provider - Enter the Insurance Provider company name.

Agent - Enter the agent for the Insurance record/policy.

Insurance Provider Phone - Enter the phone number for the insurance provider, including country code, area code, phone number and extension if applicable.

Upload Certificate of Insurance - You may upload a copy of the insurance document. You can drag and drop the file into the gray area next to **Select file**, or click the **Select file** button to choose the appropriate file from your computer or device.

Payment Information

Payment Title - Enter a title for the payment record. This will be displayed in the audit history as well as to customers. This value is required to save the Payment Information entry, and may be edited at any time.

Country - Select the country for this payment type from the dropdown. Only those countries associated to the Payment Type will be available for selection.

Payment Type - This was selected upon clicking the Add Payment Information button. Available values are Direct Deposit, Check, Credit Card, Wire Transfer, ePayable and PayMode. Depending on your selection, additional options will show. This field is required to save the payment entry, and **cannot be edited** once saved.

Direct Deposit Format - if Direct Deposit is the Payment Type, this field displays in order to select the appropriate format from the available list.

- **ACH** -Automated Clearing House if a form of electronic funds transfer that provides a secure, efficient method of receiving payment through the ACH Network.
- **CCD** - Cash Concentration or Disbursement entry is a National Automated Clearing House Association (NACHA) payment format that accommodates only the payment amount. This option does not allow remittance detail to be provided electronically.
- **CTX** - Corporate Trade Exchange is a National Automated Clearing House Association (NACHA) format that incorporates multiple addenda records that are structured in ANSI X.12 variable length fields. The addenda records are the remittance detail for the ACH payment. The CTX Format is the suggested format, as it is completely electronic and therefore the most efficient.

Remittance Address - Select from the active remittance address available in your profile. This field is available for all payment types.

Electronic Remittance Email - Enter the electronic remittance email. This field is available for all payment types, and is informational only.

Currency - Select the currency applicable to this payment information entry. This field is required to save the payment information entry.

Active - Select to make this payment information entry active. Only active entries are viewable by customers that have access to your payment information.

Bank Account - If you selected **Automated Clearing House** as the Payment Type, Bank Account information may be entered. Note that some options will differ depending on the country selection:

- **Country** - Select from the available countries. This field is required.
- **Bank Name** - Enter the name of the bank for this payment information entry. This field is required.
- **Account Holder's Name** - Enter the name of the account holder. This field is required.
- **Account Type** - Select the Account Type: Checking or Savings. This field is required.
- Depending on the country selection, the following fields will show to enter account information:
  - If the selected **Country** supports only routing and account numbers:
    - **Routing/Transit Number** - Enter the Routing or Transit number for the account. This value is required. **Note**: If United States or Canada is selected as the Country, the **Routing/Transit Number** will be validated against the required format. The **What is This?** hyperlink displays help information about Routing or Transit Number format accordingly.
      - The **Routing / Transit Number** value for **ACH** and **Wire Transfer** payment types is validated for United States bank addresses. When valid, the institution name will display under the value. An error message will display for invalid values and the record cannot be saved. Values are validated against **Federal Reserve Services** information (frbservices.org).
    - **Account Number** - Enter the Account Number. Please note that once saved, the value will be masked. If you have the permission to view sensitive bank account information, you will see a link to view the unmasked value. This field is required.
    - **Confirm Account Number** - Re-enter the Account Number. As with the Account Number field, the value is masked upon save. This field is required.
  - If the selected **Country** supports only IBAN Account Numbers:
    - **IBAN Account Number** - Enter the Account Number. Please note that once saved, the value will be masked. If you have the permission to view sensitive bank account information, you will see a link to view the unmasked value. This field is required
    - **Confirm IBAN Account Number** - Re-enter the Account Number. As with the Account Number field, the value is masked upon save. This field is required.
  - If the selected **Country** is not designated as specifically supporting only Bank Account Numbers or IBAN:
    - **Account Number Type** - Select the appropriate bank account number type, IBAN or Account Number. The appropriate fields will then display for entering and confirming the account number/IBAN.
- **Address Lines 1-3** - Enter the appropriate address information. The Address information is not required to save the bank information.
- **City/Town** - Enter the City or Town for the bank.
- **State/Province/Region** - Enter the state/province/region for the bank. Depending on the country selection, you may have a dropdown list of options, or you may enter the appropriate value.
- **Postal Code** - Enter the postal code for the bank.

Tax Information

Tax Document Type - Select the Tax Document Type. This field is required and cannot be changed once saved. Options display based on the Legal Structure selected in your profile. Tax Documents supported include:

- W-9
- W-8BEN
- W-8BEN-E
- W-8ECI
- W-8EXP
- W-8IMY
- 8233

Tax Document Name - This value is required. Indicates a name for the tax information; for example **2014 W-9**. Enter a name for the tax document. To update an existing name, simply type over the text

Tax Document Year - Select the appropriate tax document year from the dropdown.

Signature Status - This value displays depending on the status of the document associated with the record. It is read only.

Tax Documentation - Depending on the customer's configuration, you can choose to:

- **Sign Document** - If the organization has enabled **DocuSign**, click the **Sign Document** button and follow the prompts to sign the document via **DocuSign**. For additional information about this feature, see Adding and Editing Tax Information.
- **Manually upload the document instead** - Select this option to manually upload a document. The **Select file** button will display. Click on the file to be attached or **drag and drop** the file into the gray area next to **Select file**. You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself.
  - You can also choose to **Download a Pre-populated Tax Document**. This downloads a copy of the tax document with appropriate supplier profile information populated.
  - When manually adding a file, you may also be prompted to select **I certify this tax document.** This allows you to certify the information you are providing is true. If you select to certify, you will be required to enter your portal password as your eSignature for the certification. For additional information about eSignature, see eSignature Documents in Customer Registrations.

Default Permissions by Role

Following are the default roles configured for the Supplier Network Portal. You may edit the permissions associated with an existing role, or create new roles based on your organization's processes.

Manage All Portal Activities Role

Orders permissions:

- Export Search Results
- Manage Company Exports
- Create Order Acknowledgements
- Create Advanced Shipping Notice
- Create Sales Invoices/Credit Memos
- View Sales Orders
- View All Sales Orders

Administration permissions:

- Administration
- System Configuration
- Edit Items/Catalogs
- Syndicate Items/Prices
- Administer Shared Document Searches
- Create Shared Document Search Folders
- Edit Company Profile
- View TIN/SSN
- View Sensitive Bank Information
- Manage 2nd Tier Reporting
- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information
- View All User Profiles
- Edit All User Profiles/Roles/Permissions
- Edit Roles/Depts/Relationships
- Edit Fulfillment Center Access

Supplier Portal permissions:

- Supplier Portal Reports
- Manage Customer Enablements
- View Customer Enablements
- View and Respond to Sourcing Events
- View and Manage Contracts

Notification Preferences enabled for role by default:

- New Message from Customer - Payment
- New Message from Customer - Invoice
- New Message from Customer - Other
- Invoice Dispute Notification
- Response to a Sourcing Event-related question received
- Supplier Portal Cold Registration - Complete
- Supplier Registration - Returned
- Supplier Registration Duplicate Found
- Supplier Diversity Certification Expiring Notification
- Supplier Diversity Certificate Has Expired Notification
- Supplier Insurance Certification Has Expired Notification
- Supplier Insurance Certification Expiring Notification
- Upcoming Launch of Event Auction phase

Suggested Notification Preferences:

- Submission Syndication Complete
- Price File Approved/Rejected/Live
- Sales Order Received from a customer

Manage Content / Pricing Role

Administration permissions:

- Edit Items/Catalogs
- Syndicate Items/Prices
- View Company Profile
- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information
- View All User Profiles

Supplier Portal Permissions:

- Supplier Portal Reports

Suggested notification preferences:

- Submission Validation Complete
- Submission Import Complete
- Submission Syndication Complete
- Submission Validation Error
- Submission Import Error
- Submission Syndication Error
- Price File Approved/Rejected/Live
- Content/Price File Extract Complete

Support Customer Questions Role

Orders Permissions:

- Export Search Results
- View Sales Orders

Administration Permissions:

- View Company Profile
- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information

Notification Preferences enabled for role by default:

- New Message from Customer - Payment
- New Message from Customer - Invoice
- New Message from Customer - Other
- Invoice Dispute Notification

Suggested notification preferences:

- Sales Order received from a customer

Manage Orders / Invoices Role

Orders Permissions:

- Export Search Results
- Create Order Acknowledgements
- Create Advanced Shipping Notice
- Create Sales Invoices/Credit Memos
- View Sales Orders
- View All Sales Orders
- Close/Complete Sales Orders
- Manage Order Failures on Portal

Administration Permissions:

- Administer Shared Document Searches
- Create Shared Document Search Folders
- View Company Profile
- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information

Notification Preferences enabled for role by default:

- New Message from Customer - Payment
- New Message from Customer - Invoice
- New Message from Customer - Other
- Invoice Dispute Notification

Suggested notification preferences:

- Sales Invoice Import Detail Notification
- cXML Invoice Daily Status Notification (if applicable)
- Sales Order received from a customer
- Invoice Cancel/Reject Notification

Manage Company Profile Role

Administration Permissions:

- View Company Profile
- Edit Company Profile
- View TIN/SSN
- View Sensitive Bank Information
- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information

Notification Preferences enabled for role by default:

- Supplier Registration - Returned

View Reports Only Role

Administration Permissions:

- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information

Supplier Portal Permissions:

- Supplier Portal Reports

Manage Bid Opportunities Role

Administration Permissions:

- View My Profile
- Edit My Profile
- Change Password
- Edit Personal Information

Notification Preferences enabled for role by default:

- Response to a Sourcing Event-related question received
- Upcoming launch of Event Auction phase

Sample Plain Text Email Purchase Order Delivery

Following is an example of a plain text email delivered to a supplier.

========================= Purchase Order =========================

_________________________ Order Header _________________________

PO No.: 483803

Revision No: 0

Revision Date: 7/3/2013

Buyer Info:

Frank Fuller

+1 (919) 659-2120

shester@JAGGAER.com

Triton - Florida (FL Campus)

Vendor Info:

Discount Office Supplies, Inc.

2399 Highwoods Boulevard

Suite 220

test

Raleigh, US-NC 27615

USA

333333

+1 (919) 258-8888

F.O.B.: Origin

========================= Delivery Info =========================

****

For timely delivery, please print the following details on the shipping label.

****

________________________ SHIP TO INFO ________________________

TritonOrg

Labs Receiving

101 Cary Parkway

Cary, NC 27513

United States

________________________ BILL TO INFO ________________________

TritonOrg

Contact Line 1 Frank Fuller

AP 6100 Weston

Cary, NC 27513

United States

========================= Line Item Details =========================

Line No.: 1

Product Name: Brother LT 6000 Paper Tray

Catalog No.: 575327

Manufacturer Part No: LT6000

Quantity: 1.0

UOM: EA

Unit Price: 193.00 USD

Extended Price: 193.00 USD

Requested Delivery Date: 7/3/2013

Commodity Code: OFC: Office Equipment

Ship Via Ship Via Ship Via Ship Via: Best Carrier-Best Way

External Note:

Capital Expense: No

Account Code:

Pricing Code:

Contract:

Urgent - false

Expenditure Code - 100 - Chemistry

Account - 524 | JVS - OTHER SUPPLIES 100.0 % of Price

Cost Center - 401 | JVS - PRESIDENTS OFFICE/H.R. 100.0 % of Price

SubAccount - 100.0 % of Price

Price Set: CorporateList

****

_____________________ Payment Info ____________________

Total lines: 1

TOTAL: 193.00 USD

Payment Method:

Charge to PO Listed Above

Payment Terms: 10% 10, Net 30

Order Acceptance Instructions: Triton - Florida - Order acceptance instructions.

PO Clauses: Refer below

****

Failure to include PO Number on invoice will delay payment.

****

****

PO Clauses

****

Header

100 Entire Agreement

This order is for the purchase and sale of goods and/or services described on this order and any attachments hereto. Acknowledgment hereof by Supplier, as set forth on page one herein to The Triton Organization (TRITON) shall constitute Supplier's acceptance of such order. In the absence of such acknowledgement, commencement of delivery of the goods and/or services and acceptance of such deliveries by TRITON shall constitute acceptance of the terms and conditions hereof. No amendments, modifications, substitutions, or supplements to this order are binding unless in writing and signed by TRITON's designated representative.

1100 Payment Terms

Net 30 days from delivery and acceptance by TRITON of merchandise and Supplier's true and correct invoice. All invoices must separate taxable costs from non-taxable costs. Invoices not in compliance may be rejected. For merchandise requiring installation, Payment Terms are Net 30 days from delivery and installation of merchandise and acceptance by TRITON of merchandise and installation and Supplier's true and correct invoice. Invoices not in compliance may be rejected.

CHM-1 Legal Fees

In the event a dispute arises regarding this Purchase Order, the prevailing party shall be entitled to recover from the other party its reasonable attorney's fees and costs incurred in addition to any other relief to which it is entitled.

****

===================== End Purchase Order =========================

Sample HTML Email Purchase Order or Fax Purchase Order

Following is an example of an HTML Email Purchase Order. This format is sent either embedded in the email, or as an attachment to an email. This format is also used for the Fax Purchase Order.

Triton Organization

Purchase Order		
Purchase Order Date	PO/Reference No.	Revision No.
Jul 3, 2013	**483803**	**0**

Buyer Information

Contact	Triton - Fla BU - Purchasing Info
Email	TritonFLABU@triton.con
Phone	+1 (919) 999-9998
Business Unit	Triton - Florida (FL Campus)

Order acceptance instructions:

Triton - Florida - Order acceptance instructions.

Supplier Information

Vendor Name	Discount Office Supplies, Inc.
Address	2399 Highwoods Boulevard Suite 220 test Raleigh, US-NC 27615 USA
Duns No.	333333
Phone	+1 (919) 258-8888
Fax	
Vendor Number	0122125332-77

Delivery Information

Delivery Addess
TritonOrg
Labs Receiving
101 Cary Parkway
Cary, NC 27513
United States

ShipTo Address Code	labs_recv

Delivery Information

Requested Delivery Date	Jul 3, 2013
Expedite	No
Ship Via Ship Via Ship Via Ship Via	Best Carrier-Best Way

Shipping Instructions

Vendor Terms and Conditions	TriFla_T&Cs.docx (22k)

Line No.	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1 of 1	Brother LT 6000 Paper Tray	575327	EA	193.00 USD	1 EA	193.00 USD

Taxable	Yes
Capital Expense	No
Commodity Code	OFC: Office Equipment OFC: Office Equipment
Price Set	CorporateList
PO Clauses	Refer below

Shipping, Handling and Tax charges are calculated and charged by each supplier. Total **193.00 USD**

Billing Information

Header	100	Entire Agreement	This order is for the purchase and sale of goods and/or services described on this order and any attachments hereto. Acknowledgment hereof by Supplier, as set forth on page one herein to The Triton Organization (TRITON) shall constitute Supplier's acceptance of such order. In the absence of such acknowledgement, commencement of delivery of the goods and/or services and acceptance of such deliveries by TRITON shall constitute acceptance of the terms and conditions hereof. No amendments, modifications, substitutions, or supplements to this order are binding unless in writing and signed by TRITON's designated representative.
	1100	Payment Terms	Net 30 days from delivery and acceptance by TRITON of merchandise and Supplier's true and correct invoice. All invoices must separate taxable costs from non-taxable costs. Invoices not in compliance may be rejected. For merchandise requiring installation, Payment Terms are Net 30 days from delivery and installation of merchandise and acceptance by TRITON of merchandise and installation and Supplier's true and correct invoice. Invoices not in compliance may be rejected.
	CHM-1	Legal Fees	In the event a dispute arises regarding this Purchase Order, the prevailing party shall be entitled to recover from the other party its reasonable attorney's fees and costs incurred in addition to any other relief to which it is entitled.

Charge to PO Listed Above	
Payment Terms	10% 10, Net 30
F.O.B.	Origin
Contract	*no value*
Pricing Code	
Account Code	
Quote number	

Billing Address

TritonOrg
Contact Line 1 — Frank Fuller
AP 6100 Weston
Cary, NC 27513
United States