Suppliernet

Handbook for Suppliers
## v03

Release v03
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Index

1. WELCOME

The purpose of this handbook is to familiarize users with tasks performed in the JAGGAER Direct supplier portal in order to respond to Request for Quotation (RFQ) and Auctions.

2. INVITATION EMAIL FOR THE RFQ

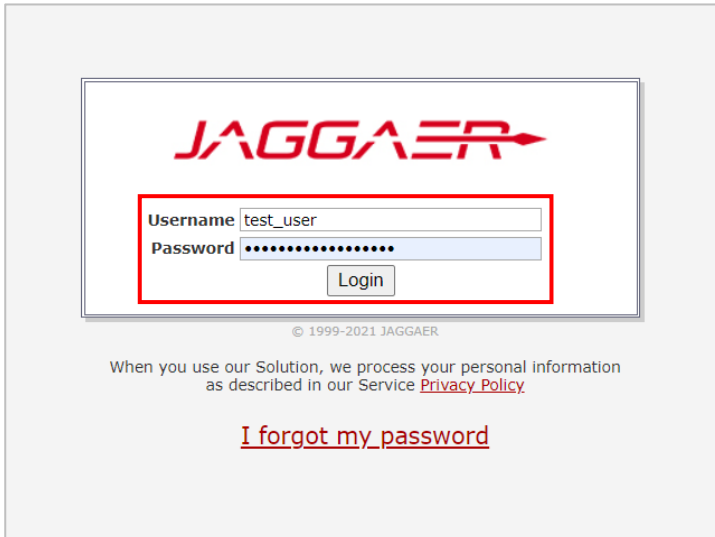Once buyers create the RFQ and invite suppliers, the supplier will receive an email containing:
- The name of the RFQ
- Link to access the portal
- Credentials to access (one-time account)
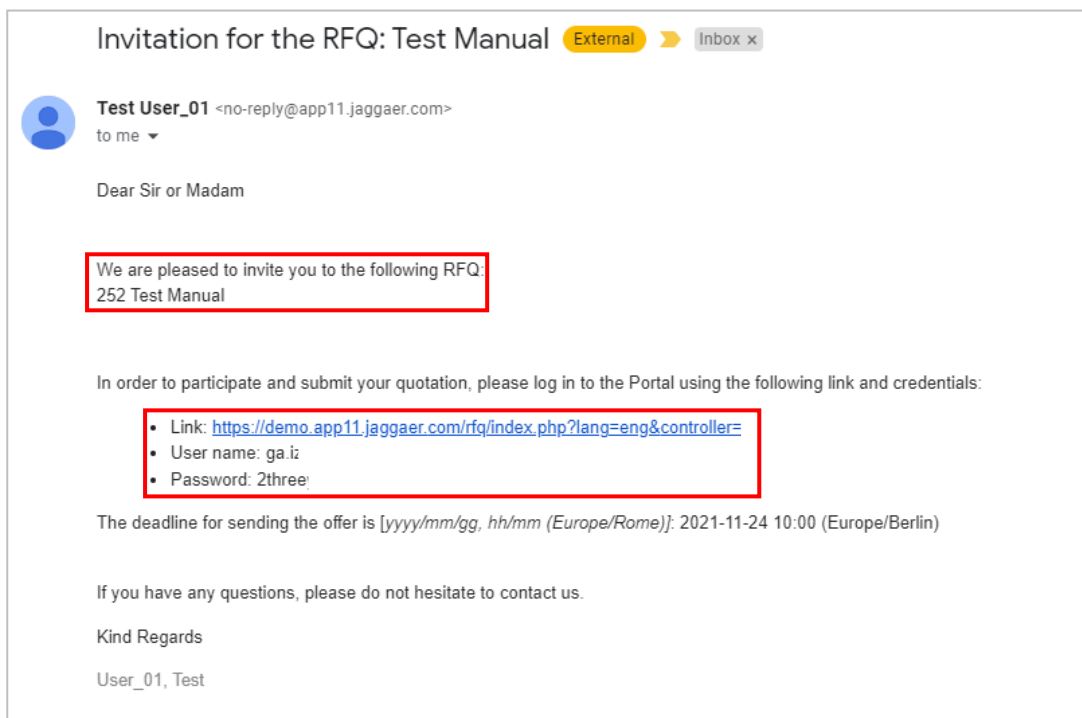
Username and Password are specific to each individual RFQ, so each invitation received will be different.

3. ACCESS TO THE PORTAL

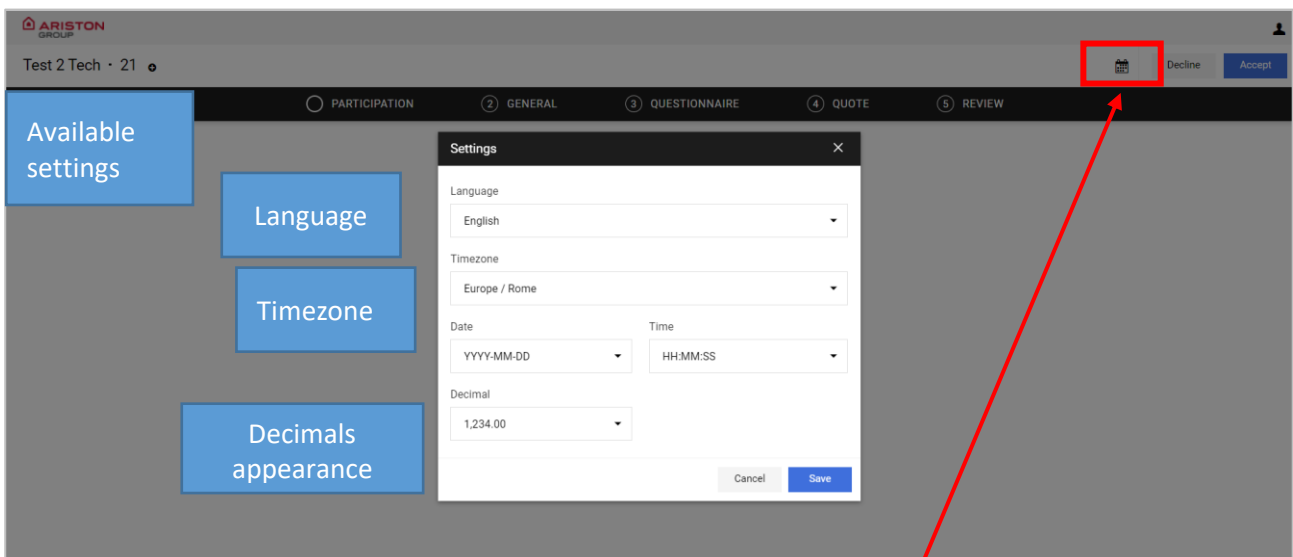The link in the invitation email leads to the page where credentials can be inserted to access the portal.

Enter Username and Password received in the invitation email and click on Login button.

It is not possible to access the platform with two users simultaneously.
In this case, use different browsers or the incognito tab of your browser.

4. QUOTE THE RFQ

Once access the portal, there is the possibility to adjust settings, timezone and Decimal appearance

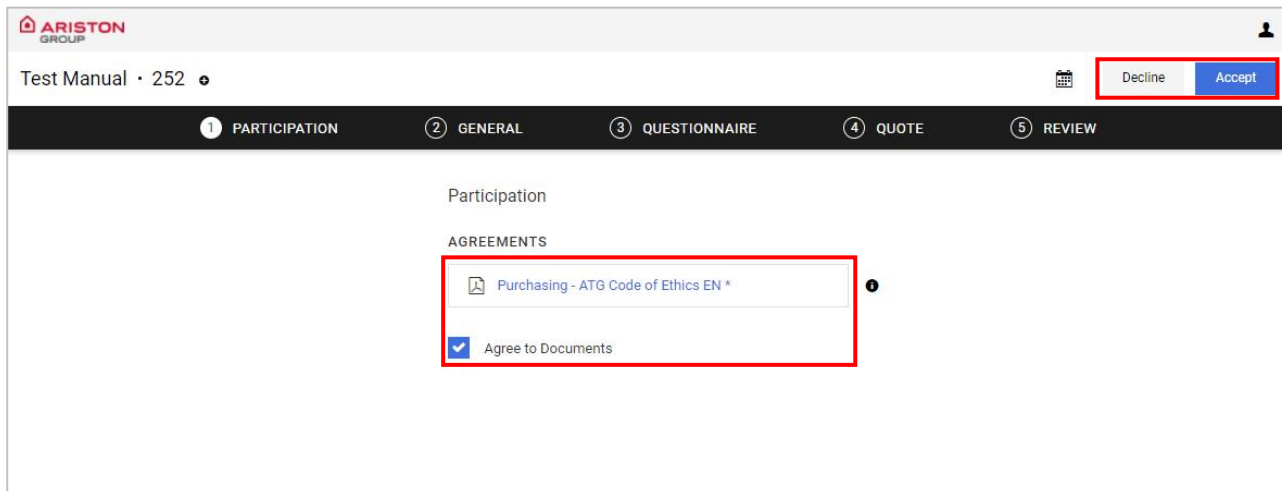Click on Save to go through the tabs illustrated in the following paragraphs.
In any other moment these settings are available via calendar icon.

4.1. Partecipation

In this tab the RFQ can be decline or accept by clicking on Decline or Accept button.
Here all the RFQ header documents are displayed. In some cases, the documents may be marked as "must view" or "must agree", in particular:

- Documents marked as "must view" must be downloaded before moving to the next step in the RFQ process.
- Documents marked as "must agree" must be accepted selecting a checkbox before moving to the next step in the RFQ process.
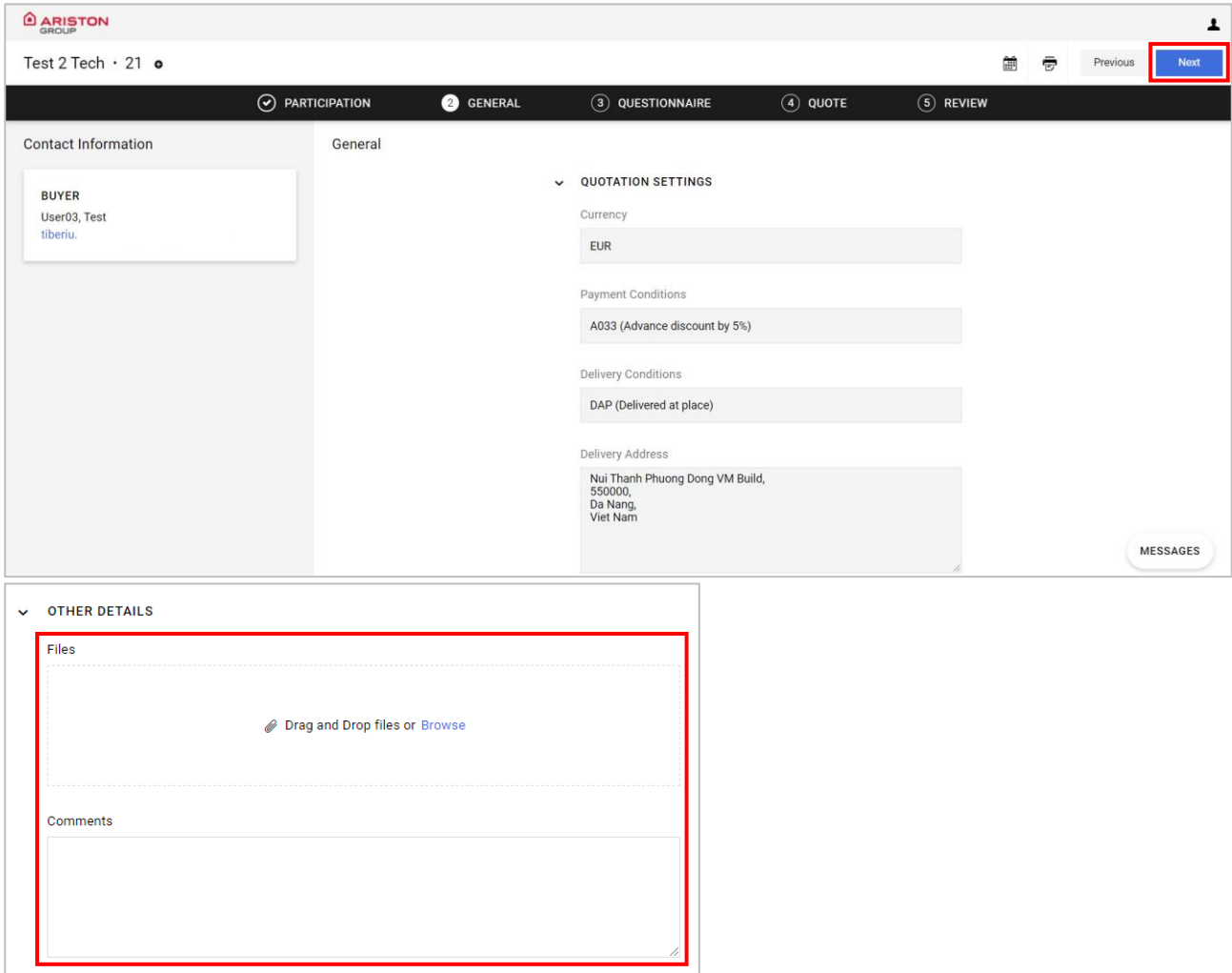

Note: If you have already opened the RFQ and viewed and/or agreed to all documents that require these actions, you will be able to move through the process without viewing or agreeing again, provided the documents have not changed.

4.1. General information

In this tab, all the header data, quotation settings, and supplier information are displayed. This information can be validated here.

It is also possible to add comment and/or attachment with drag and drop function in "Files" box or with "Browse" button in the same box to search file in your PC.

Click on the Next button to move on the next tab.

4.2. Questionnaire

In this tab, if questionnaire is present, it is displayed and could be filled.
The questionnaire should include mandatory (marked with *) and optional questions to be answered.
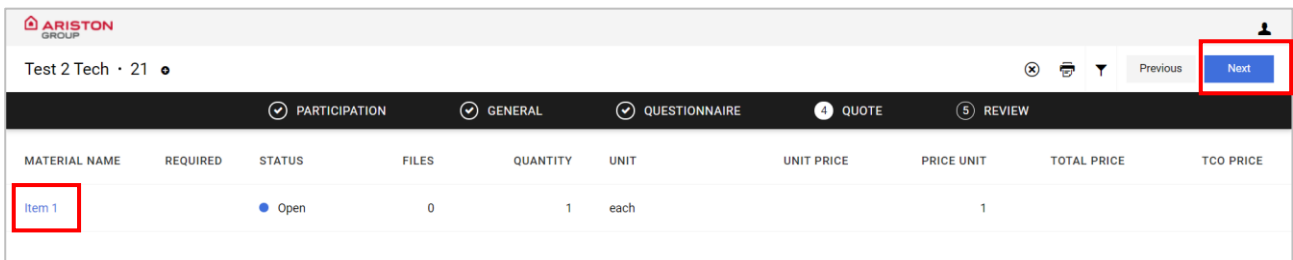
Click on the Next button to move on the next tab.

4.3. Quote

In the Quote tab, all the RFQ items are listed and it is possible to submit quotes for the items by clicking on Material Name.
Quotes may be made online or, if the CBD includes an Excel spreadsheet, the spreadsheet can be downloaded and items quoted there.
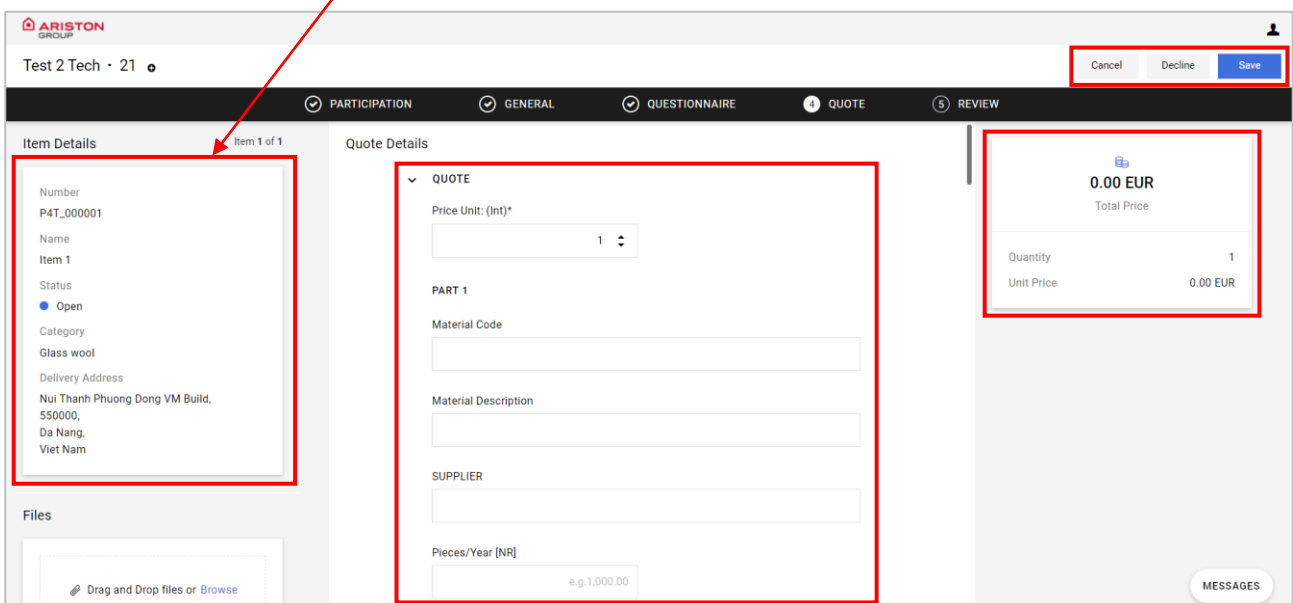It is possible to quote or decline each item. When declining an item, a reason must be entered by the suppler.

4.3.1. Online Quotes

The following information is displayed per item:
- Item number
- Item name
- Requested quantity
- Delivery address
- All fields of the CBD that were set visible
- Attachments
- Remarks

For the first displayed item, enter the quote information required in the fields.

Use the box "Prefil Identical Fields" to copy the same information on next item or on all items of the RFQ.

If you are quoting the item, enter the information in the fields and then click **Save**.
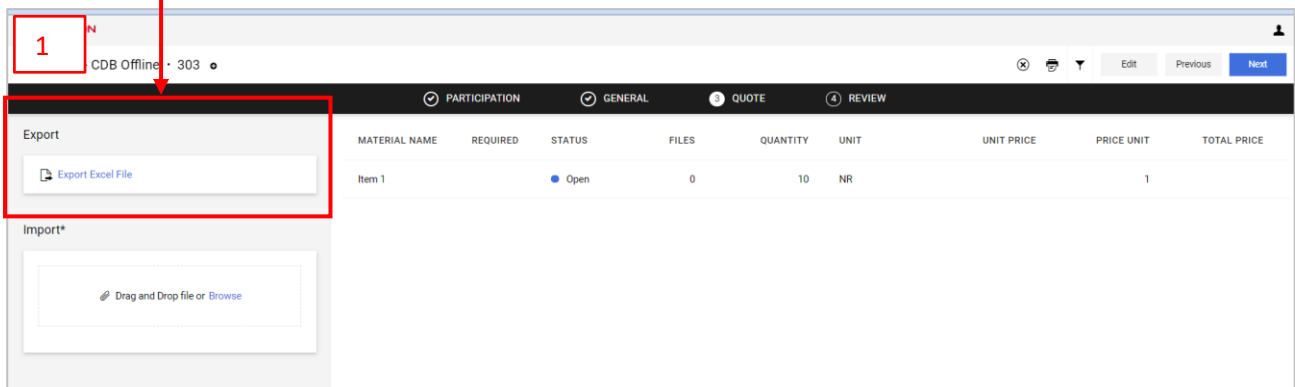If you are declining the item, click **Decline**.
To cancel and return to the previous step, click **Cancel**.

Repeat the steps above for each item.

4.3.2. Offline Quotes

- **Standard** - If an Excel sheet has been provided in the CBD, the supplier has to download this Excel sheet to be able to quote for every item and then upload it again to the system after filling out all the required data.
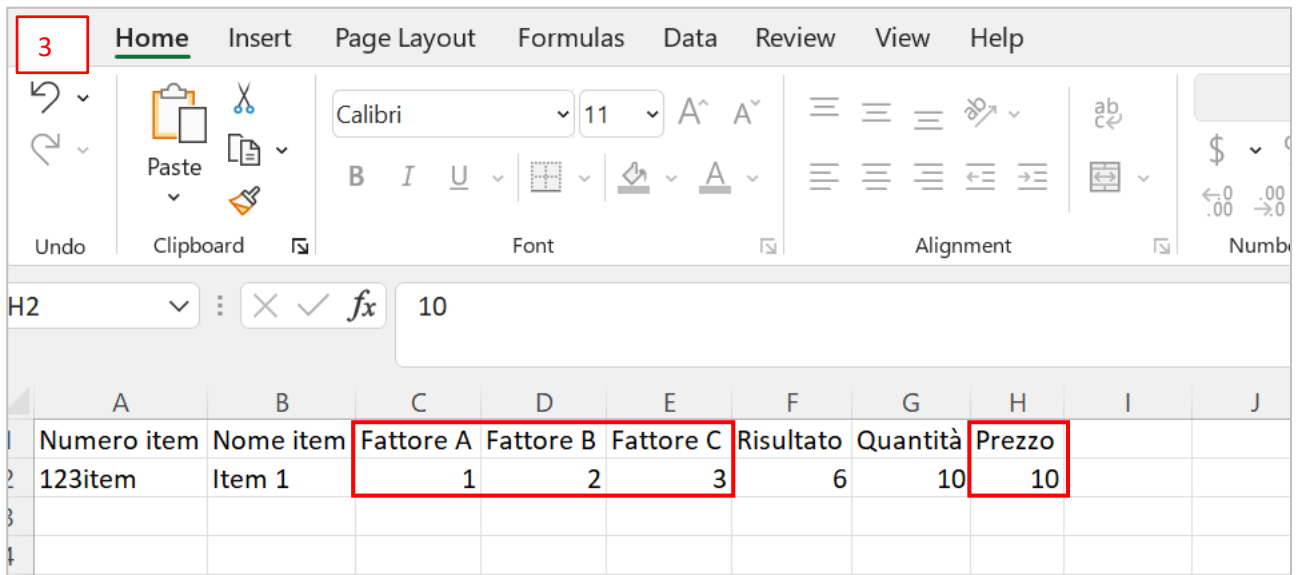
1st **step**: Export excel file

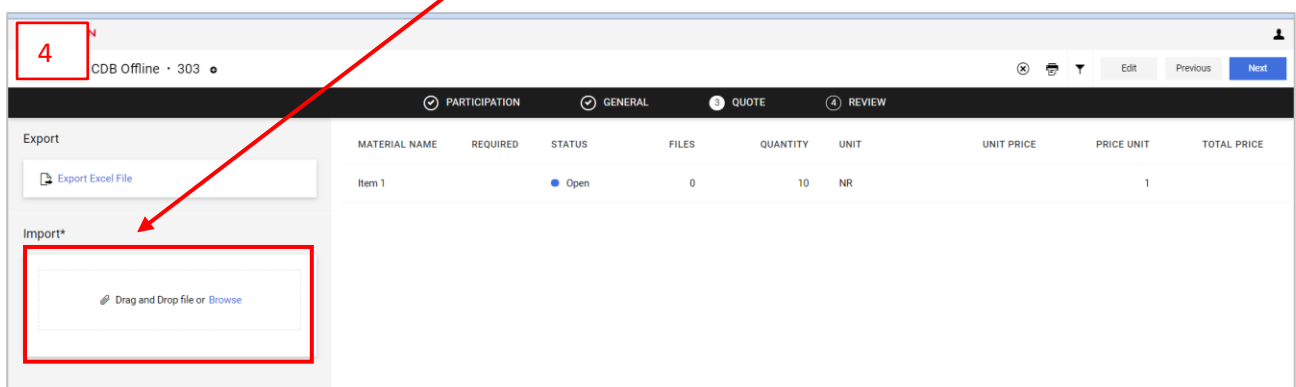2nd **step**: Download excel file.
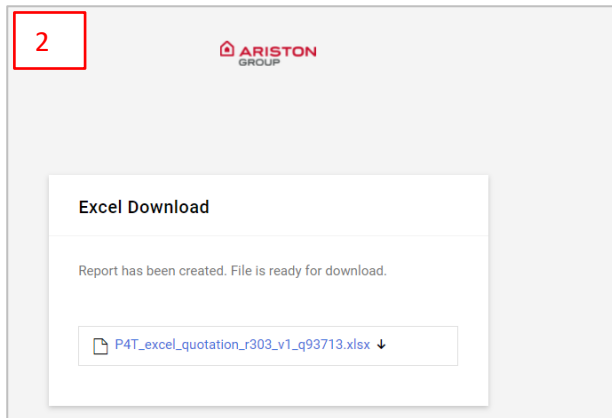
3rd Step: in the downloaded excel file, fill all the available field NOTE that only the available fields are editable, others are not modifiable:
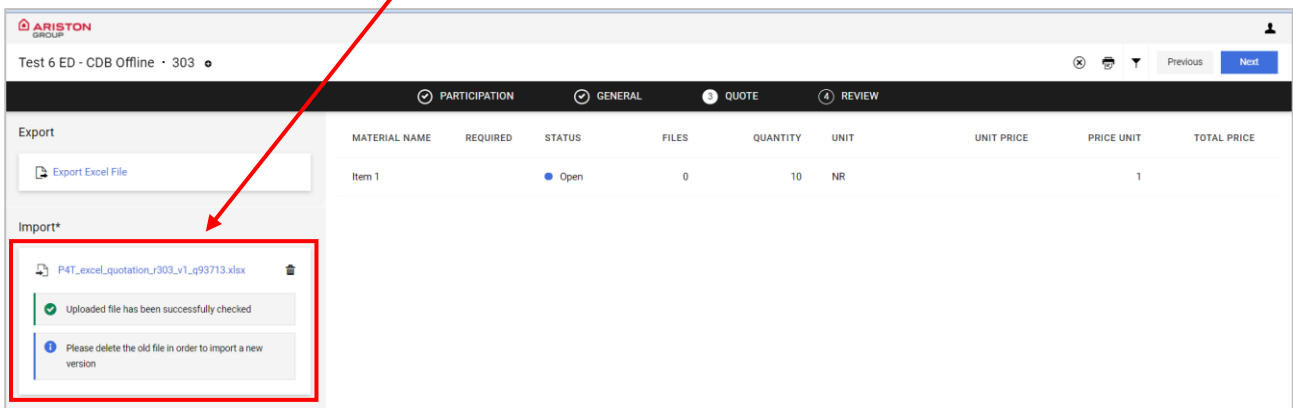

Save excel file.

4th Step: upload saved file in the available field

Here after an example of the file uploaded
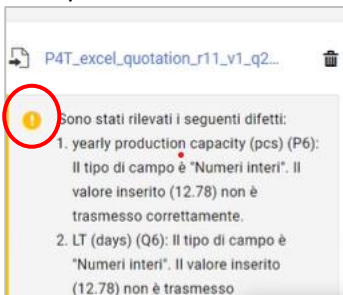
If the uploaded file is correct, than a greed dot will appear.

If some **data is not correct than a warning message will appear**, in this case:

1. Change data in excel file according to the indication in the warning message: they will appear in yellow and do not block the upload of the file
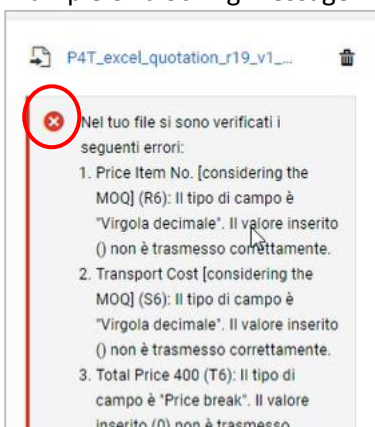
Example

2. Blocking (red) message: they will appear in RED and DO NOT ALLOW the upload of the file, in this case:
   a. Delete the old file
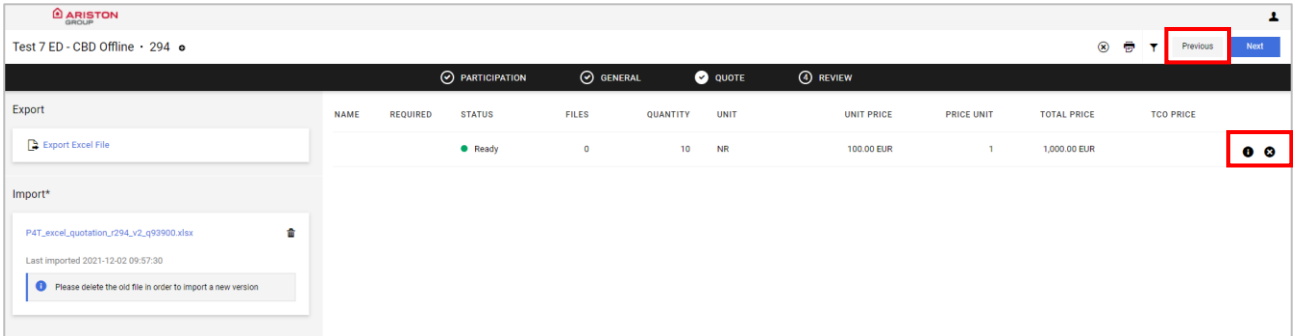   b. Upload the correct file

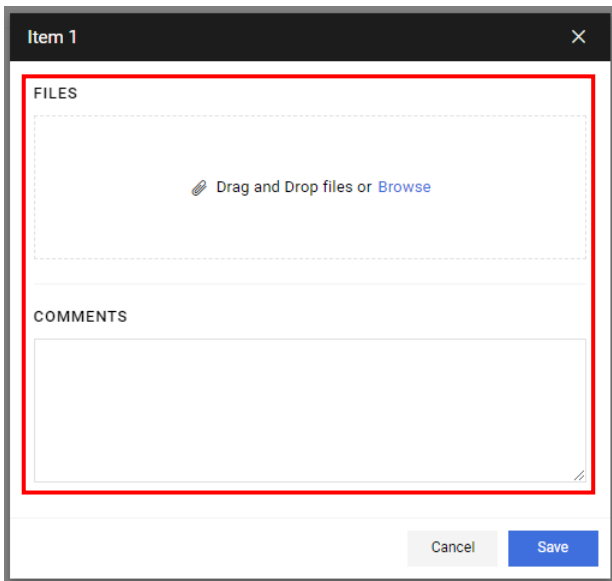Example of blocking message

Once completed click on Next button to confirm.

Once clicked on Next button, if you need to upload an attachment related to a specific item, click on Previous button to go back to Quote tab.
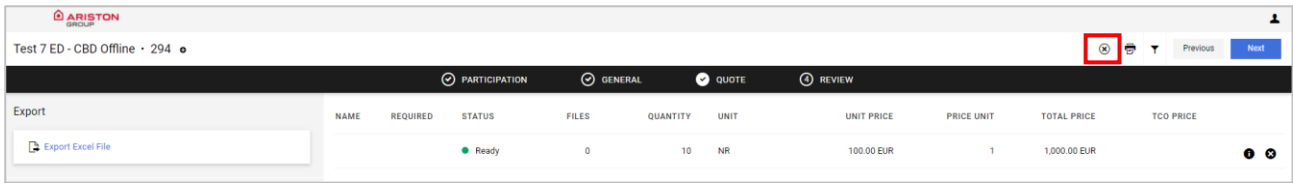

Click on "i" (information button) and the following pop up will appear.

It is possible to add comment and/or attachment with drag and drop function in "Files" box or with "Browse" button in the same box to search file in your PC, click on Save button to confirm.
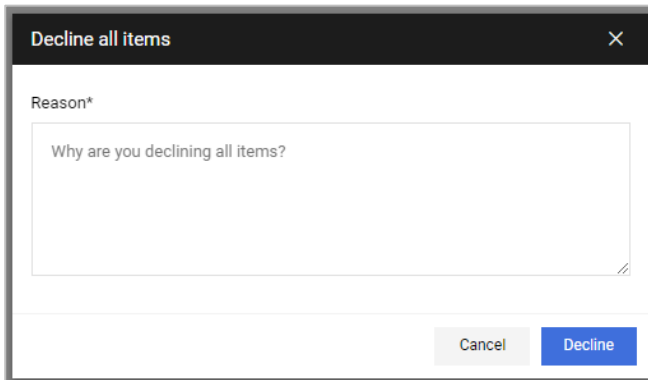

Click on "X" button to decline a single item.

Alternatively select the "X" button highlighted in the previous figure to decline all items in the RFQ, the following popup will be shown.

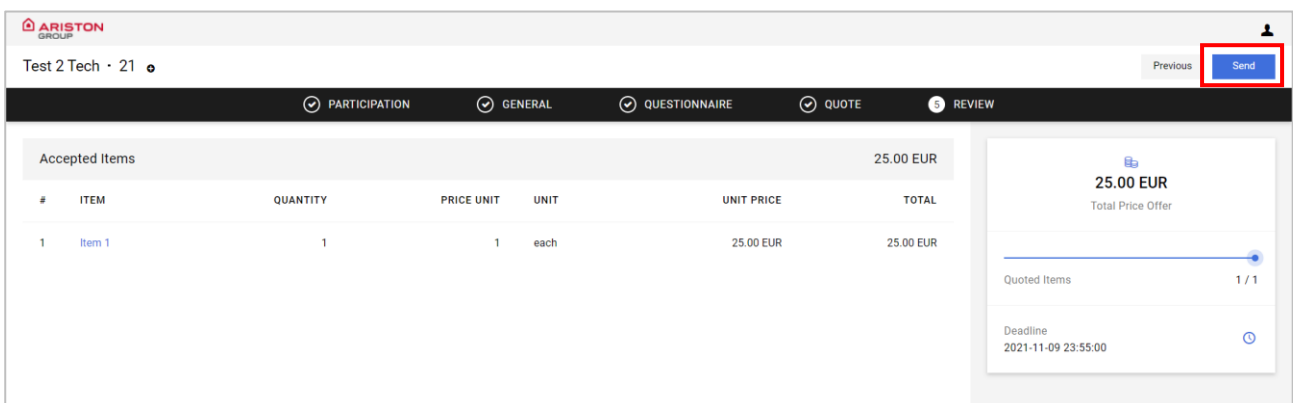Enter a mandatory reason and click the **Decline** button to confirm.

Click on the Next button to move on the Review tab.

- **Multi Item** - If an Excel sheet has been provided in the CBD, the supplier can download this Excel sheet for the quotation of the RFQ (all requested items are provided within one Excel sheet) and then upload it to the system again after filling it out.

Repeat steps form 1 to 4 as the example above

4.4. Send back quote and review

Review the items for accuracy and the last step is the submission of the quote back to the buyer.
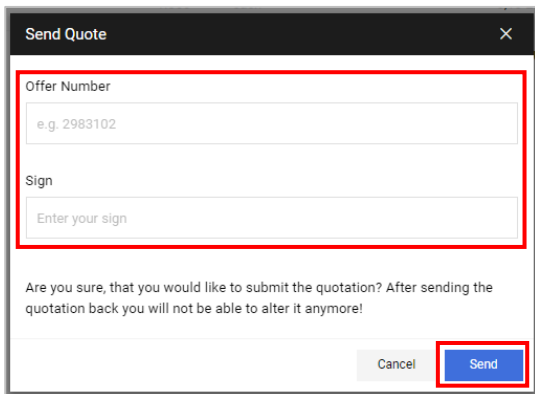
Click on Send button to go on the following steps.

NB. Once the quotations have been sent cannot be changed without the reference Buyer support.
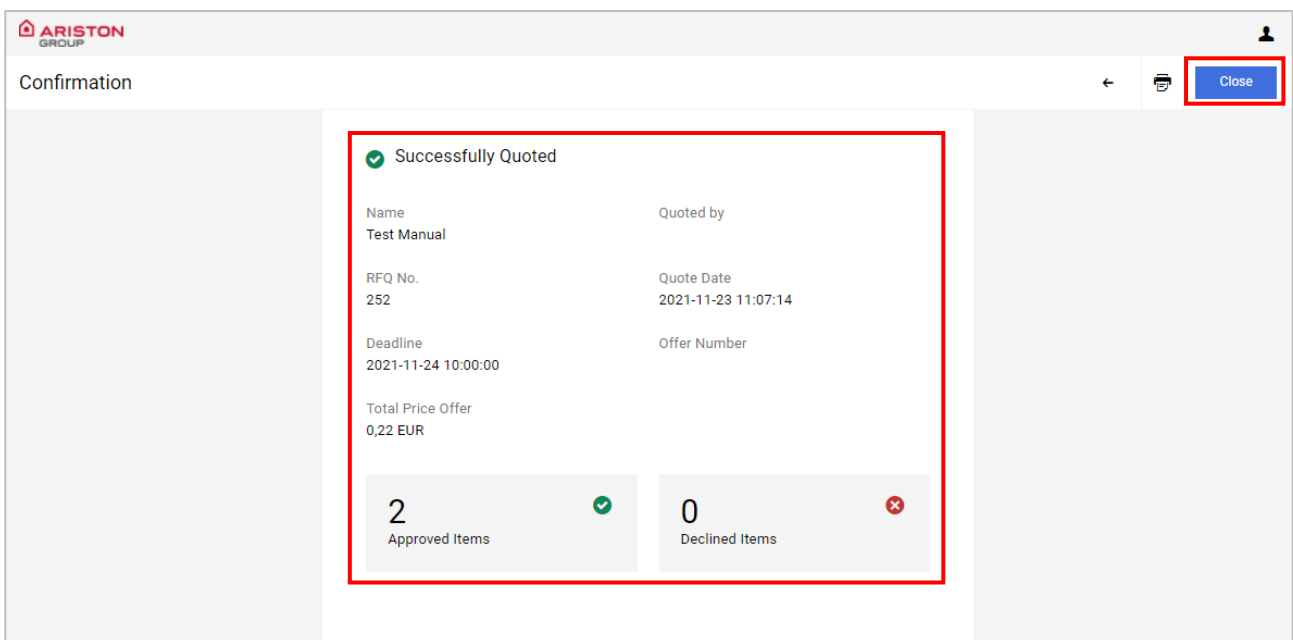

1. In the **Offer Number** field, enter the number for the quote.
2. In the **Sign** field, enter your initials (as the supplier user who is processing the quote).
3. Click **Send**. The buyer receives a notification that the RFQ has been submitted.
4. The confirmation page will be shown in order to recap the quotation done.

5. INVITATION EMAIL FOR THE AUCTION

Once buyers create the Auction and invite suppliers, the supplier will receive an email containing:
- The name of the RFQ
- Link to access the portal
- Credentials to access (one-time account)
- Auction duration information
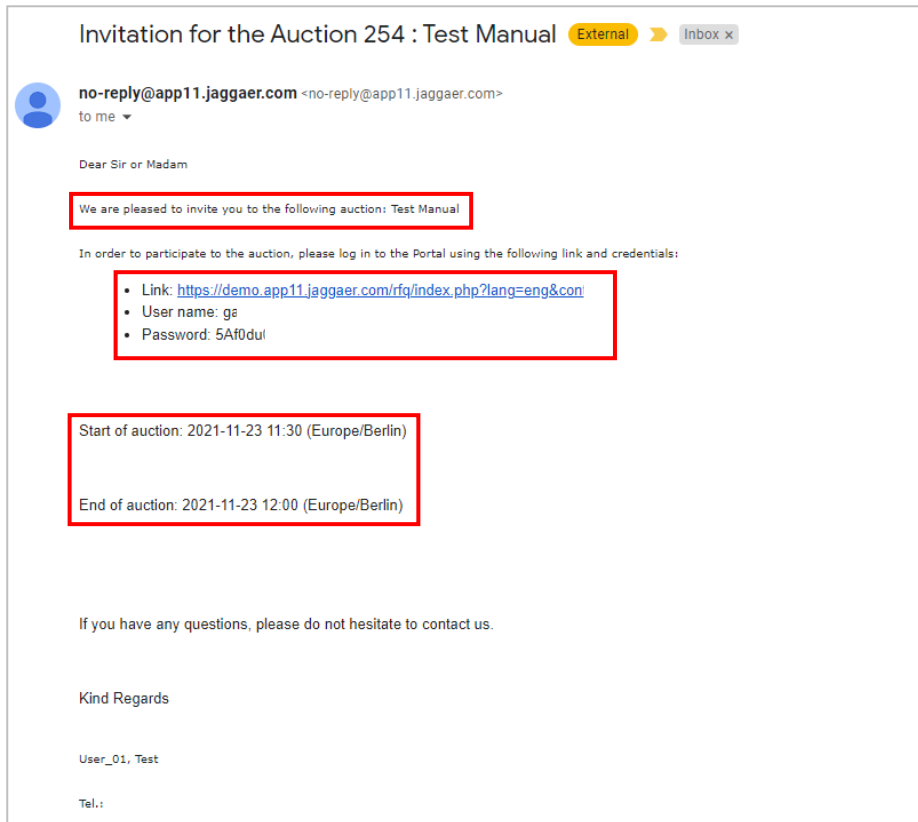
Username and Password are specific to each individual RFQ, so each invitation received will be different.

6. QUOTE THE AUCTION

The link in the invitation email leads to the page where credentials can be inserted to access the portal.

Enter Username and Password received in the invitation email and click on Login button.

6.1. Documents

Once access the portal the documents tab will be shown.
The upper box shows all the auction details.

Here all the Auction header documents are displayed. In some cases, the documents may be marked as "must view" or "must agree", in particular:
- Documents marked as "must view" must be downloaded before moving to the next step in the RFQ process.
- Documents marked as "must agree" must be accepted selecting a checkbox before moving to the next step in the Auction process.

In this tab the Auction can be decline (clicking on Decline Auction button) or accepted (clicking on Nest Step button).

6.2. General

Once documents has ben accepted General tab will be shown.

In this tab all the header data, quotation setting, supplier information are displayed and can be filled or validated.

In this tab, if questionnaire is present, it is also displayed and could be filled.
The questionnaire should include mandatory (marked with *) and optional questions to be answered.

Once mandatory field are filled click on Next Step button to go on the following tab.

6.3. Quote

In the quote tab it is possible to see the Auction starting countdown (if it is not started yet) and all the Auction items are listed.

Clicking on "Toogle Auction Setting" button it is possible to see more Auction details information as shown in the following screen.

Auction type should be different and defined as follow:

- **English Dynamic Auction**
  - Possibility to submit multiple bids. For submissions of subsequent bids, the prices must be reduced /increased.
  - The participant with the lowest bid wins the auction.

- **English Ticker Auction**
  - Definition of the start price and bid steps by the purchaser.
  - Each bid step must be confirmed by all bidders – if a participant does not approve, they will be excluded from the auction.
  - The auction ends when no more steps are confirmed or a defined number of bidders are remaining.

- **Dutch Ticker Auction**
  - Definition of start price and bid steps by the purchaser.
  - The participant submits only one bid.
  - The auction ends automatically after the bid submission.

- **Hong Kong Ticker Auction**
  - Hong Kong Ticker and English Ticker are very similar. The difference is that, in a Hong Kong Ticker auction, once a defined number of participants is reached, the auction goes on until the last supplier has submitted the final bid.

Once the Auction is started, countdown shows the remaining time before closing.

For each items displayed it is possible to fill mandatory field (marked with *) and then click on Bid button to submit.

A confirmation popup will be shown, click on Ok to confirm or Cancel to delete.
For each item postitions (if selected by the Buyer during Auction creation) it is possible to see ranking (with number or traffic light depending on Buyer side settings) and current bid information.

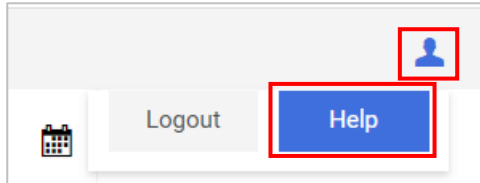Repeat the steps above for each items.

Once deadline has reached the system informs that the auction has ended and no ore bids will be accepted.
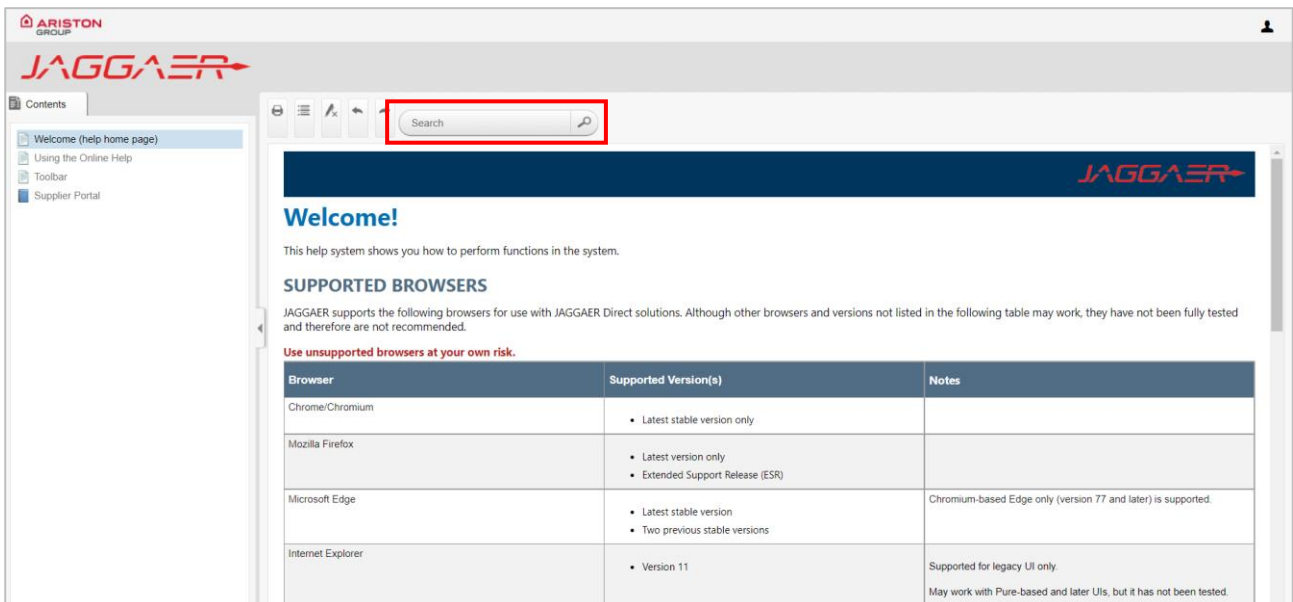
7. ONLINE HELP

JAGGAER Direct offers multilingual online help for understand modules and instructional steps.

To access the online help:
1. Click the user icon in the toolbar, then click the Help button in the dropdown.

2. The Support Portal help opens in a new tab.
3. Enter a search term you would like to view more information on (i.e. "RFQ") and click Search. A list of available help pages is displayed.
4. Click on a link from the list of results to view the help page.