



PROCURE PERFORMANCE

Supplier Performance Management Administrator Guide

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Chapter 1 Administration

1.1 Introduction

The actions that a user can perform and the controls that the user can access depend on the rights and privileges granted to the user; hence the interface components (such as, buttons, tabs, and links) visible on the screen may differ between users. This aspect needs to be kept in mind while understanding the steps to change settings. The administration functionalities are controlled from the **Setup** tab.

1.2 Defining Configurations

1.2.1 Managing Supplier Ranking System





You can customize the supplier ranking system to award each supplier a rank based on the overall performance score attained by the supplier.

Note: *The Ranking System can be modified at any time and it will be reflected across the application immediately for old and future scores.*

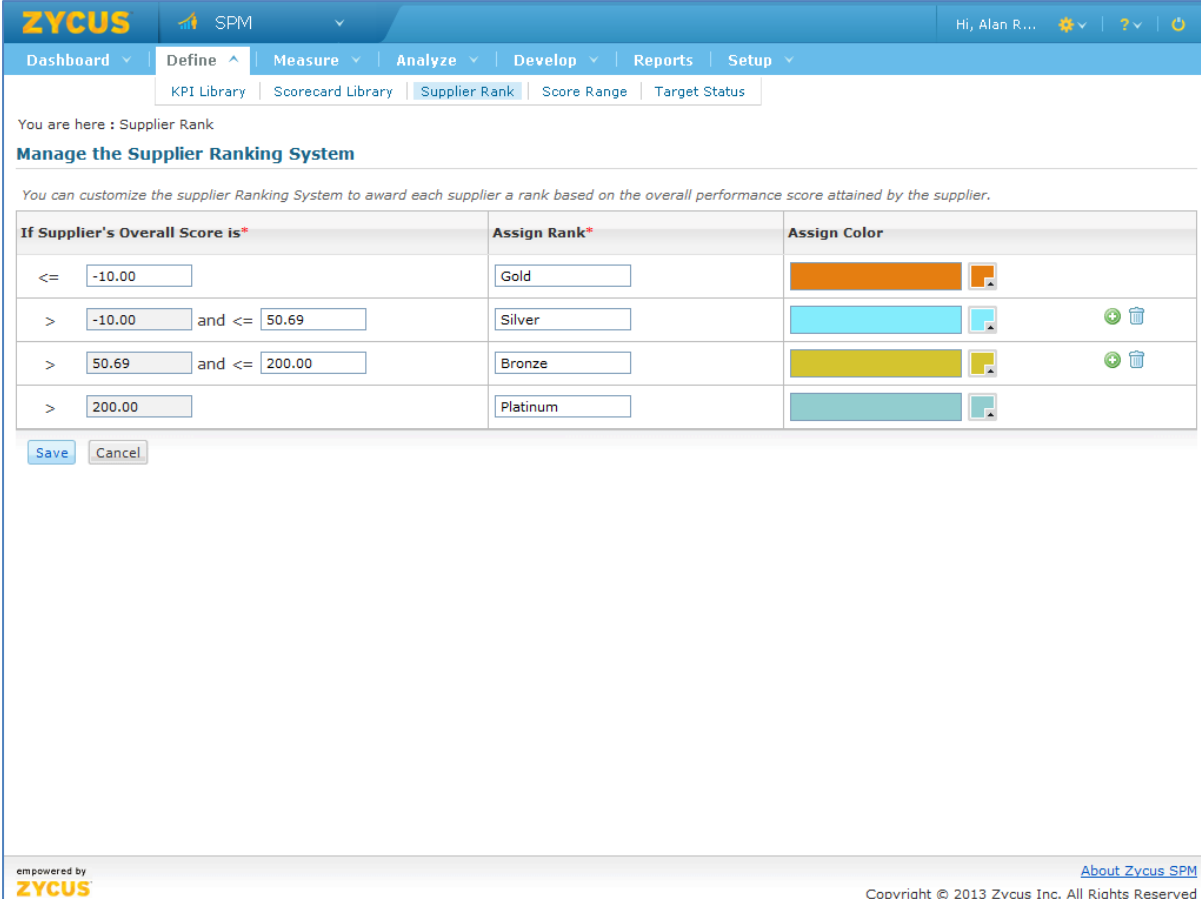
To manage supplier ranking system:

1. Click **Define** tab.
2. Click **Supplier Rank** sub-tab. The following page is displayed.

The screenshot shows the ZYCUS SPM interface. At the top, there is a navigation bar with the ZYCUS logo and 'SPM' dropdown. Below it is a menu with 'Dashboard', 'Define', 'Measure', 'Analyze', 'Develop', 'Reports', and 'Setup'. Under 'Define', there are sub-menus for 'KPI Library', 'Scorecard Library', 'Supplier Rank', 'Score Range', and 'Target Status'. The user is logged in as 'Hi, Alan R...'. The main content area is titled 'Manage the Supplier Ranking System' and includes a sub-header 'You are here : Supplier Rank'. A paragraph states: 'You can customize the supplier Ranking System to award each supplier a rank based on the overall performance score attained by the supplier.' Below this is a table with three columns: 'If Supplier's Overall Score is', 'Assign Rank', and 'Assign Color'. The table contains four rows of data. A 'Modify' button is located below the table. At the bottom of the page, there is a footer with 'empowered by ZYCUS' and 'Copyright © 2013 Zycus Inc. All Rights Reserved'.

If Supplier's Overall Score is	Assign Rank	Assign Color
<= -10.00	Gold	
> -10.00 and <= 50.69	Silver	
> 50.69 and <= 200.00	Bronze	
> 200.00	Platinum	









3. Click **Modify** to modify the ranking system. The following page is displayed.




You are here : Supplier Rank

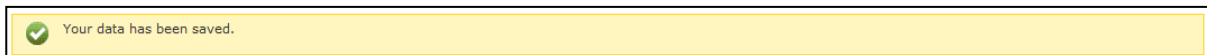
Manage the Supplier Ranking System

You can customize the supplier Ranking System to award each supplier a rank based on the overall performance score attained by the supplier.

If Supplier's Overall Score is*	Assign Rank*	Assign Color
<= <input type="text" value="-10.00"/>	<input type="text" value="Gold"/>	
> <input type="text" value="-10.00"/> and <= <input type="text" value="50.69"/>	<input type="text" value="Silver"/>	  
> <input type="text" value="50.69"/> and <= <input type="text" value="200.00"/>	<input type="text" value="Bronze"/>	  
> <input type="text" value="200.00"/>	<input type="text" value="Platinum"/>	

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4. Enter the required details.
5. Click **Save**. The following message is displayed.



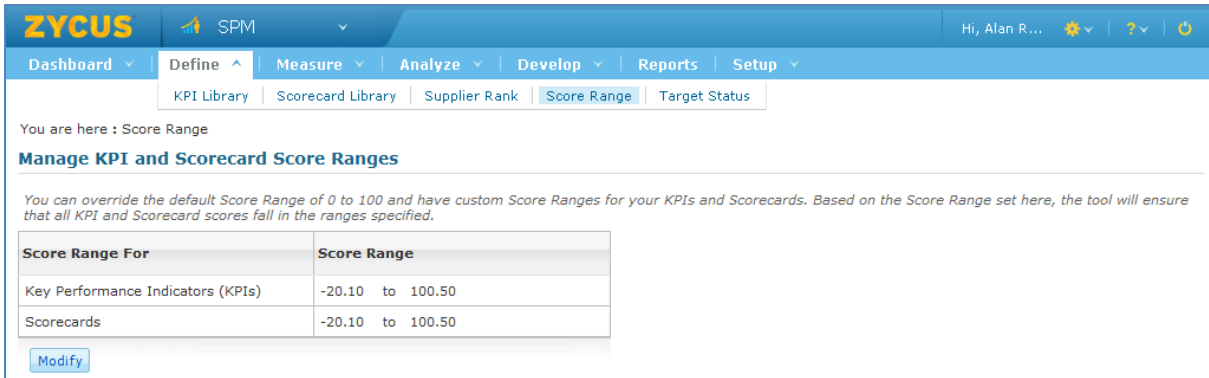
1.2.2 Managing Score Ranges for KPIs & Scorecards

You can override the default score range of 0 to 100 and have custom score ranges for your KPIs and Scorecards. Based on the score range set here, all KPI and Scorecard scores will fall in the ranges specified.

Note: If the Score Ranges are modified after data (KPI, Scorecard, and Event) is created in the system, none of the existing data will be affected, unless edited.

To manage score ranges for KPIs & scorecards:

1. Click **Define** tab.
2. Click **Score Range** sub-tab. The following page is displayed.



You are here : Score Range

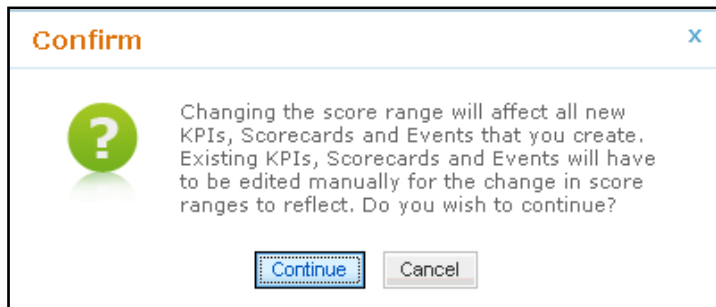
Manage KPI and Scorecard Score Ranges

You can override the default Score Range of 0 to 100 and have custom Score Ranges for your KPIs and Scorecards. Based on the Score Range set here, the tool will ensure that all KPI and Scorecard scores fall in the ranges specified.

Score Range For	Score Range
Key Performance Indicators (KPIs)	-20.10 to 100.50
Scorecards	-20.10 to 100.50

[Modify](#)

3. Click **Modify** to modify the score range. The following warning message is displayed.

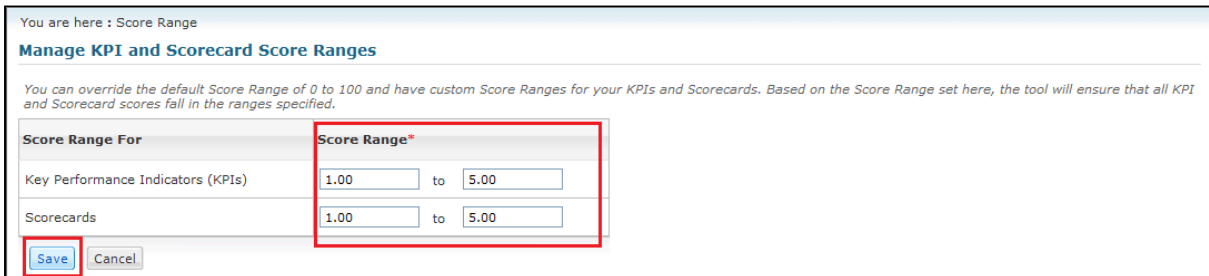


Confirm

Changing the score range will affect all new KPIs, Scorecards and Events that you create. Existing KPIs, Scorecards and Events will have to be edited manually for the change in score ranges to reflect. Do you wish to continue?

[Continue](#) [Cancel](#)

4. Click **Continue**. The following page is displayed.



You are here : Score Range

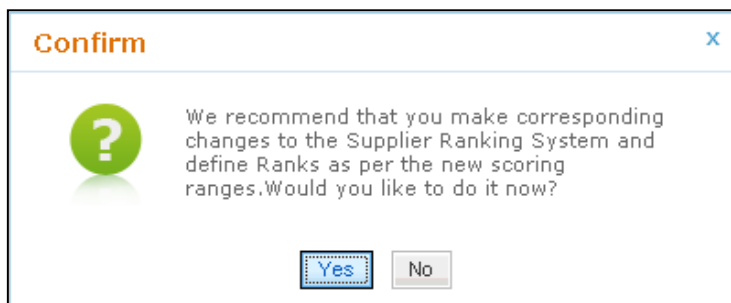
Manage KPI and Scorecard Score Ranges

You can override the default Score Range of 0 to 100 and have custom Score Ranges for your KPIs and Scorecards. Based on the Score Range set here, the tool will ensure that all KPI and Scorecard scores fall in the ranges specified.

Score Range For	Score Range*
Key Performance Indicators (KPIs)	1.00 to 5.00
Scorecards	1.00 to 5.00

[Save](#) [Cancel](#)

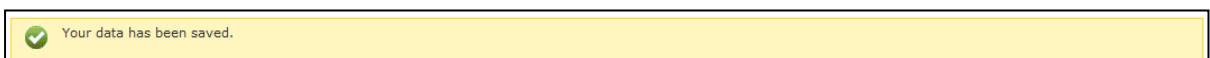
5. Enter the required details.
6. Click **Save**. The following message is displayed.




Confirm

We recommend that you make corresponding changes to the Supplier Ranking System and define Ranks as per the new scoring ranges. Would you like to do it now?

[Yes](#) [No](#)



 Your data has been saved.

7. Click **Yes** to manage the supplier ranking system. For more details, see [Managing Supplier Ranking System](#).
8. Click **No** to save the score range defined

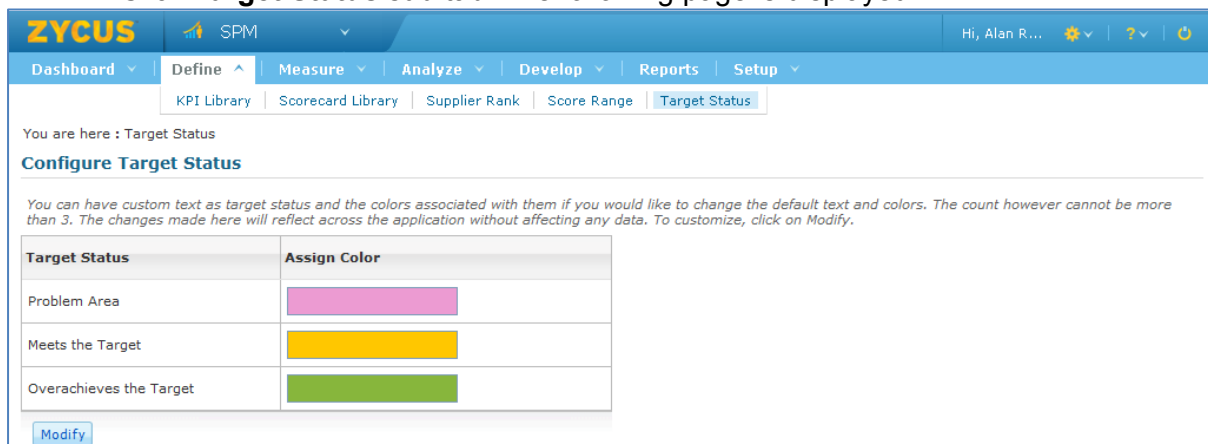
1.2.3 Configuring Target Status

You can have custom text as target status and the colors associated with them if you would like to change the default text and colors. The count however cannot be more than three.

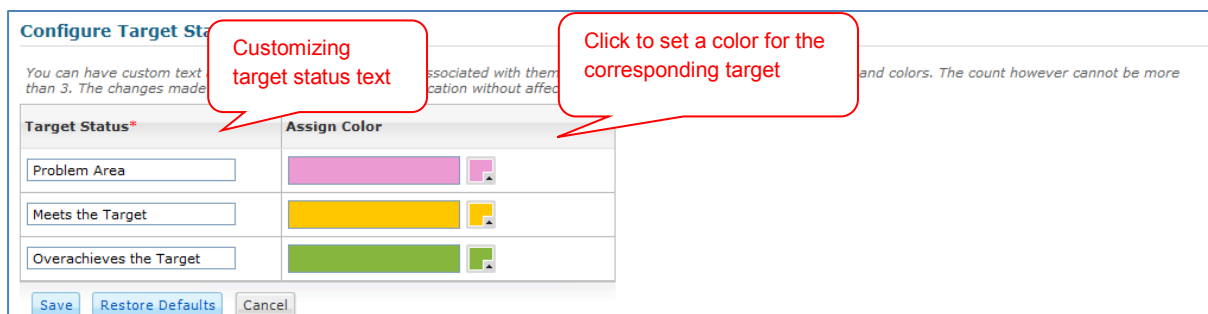
Note: *The Target Statuses can be modified at any time and it will reflect across the application immediately for old and future scores.*

To configure target status:

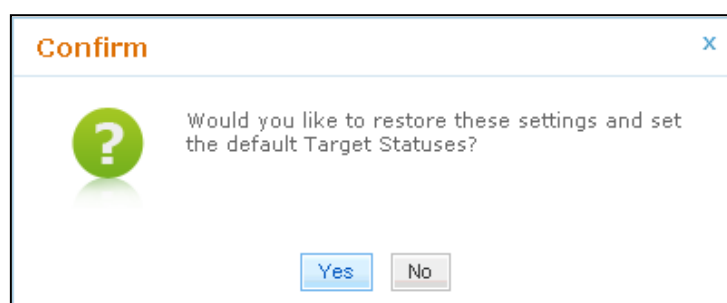
1. Click **Define** tab.
2. Click **Target Status** sub-tab. The following page is displayed.



3. Click **Modify** to modify the target status. The following page is displayed.



4. Click **Restore Defaults** to restore default text and color for the target status. The following message is displayed.



5. Click **Save** to save the changes made. The following message is displayed.



1.3 Defining Client Settings

1.3.1 User Settings

1.3.1.1 Assigning Facilities

You can assign one or more facilities to the user. Any User will be able to score an Event for the Facilities he/she is assigned to. If a user is not assigned to any Facility, he/she cannot be invited to score an Event.


To assign facilities:

1. Logon to the SPM application.
2. Click **Setup** tab.
3. Click **Client Settings** sub-tab under **Settings** tab.
4. Under **User Settings** section, click **Assign Facilities**. The **User and Facility Mapping** page is displayed.

The screenshot shows the ZYCUS SPM application interface. The top navigation bar includes 'Dashboard', 'Define', 'Measure', 'Analyze', 'Develop', 'Reports', and 'Setup'. The 'Setup' tab is active, and the 'Client Settings' sub-tab is selected. The main content area is titled 'Settings' and contains a section for 'User and Facility Mapping'. This section includes a search bar with a 'Go' button and a table listing users and their assigned facilities.

User Name	Email Address	Facilities Assigned	Action
Prf264 Prf264	prf264@tms.com		
Prf265 Prf265	prf265@tms.com		
Prf266 Prf266	prf266@tms.com		
Prf267 Prf267	prf267@tms.com		
Prf268 Prf268	prf268@tms.com		
Prf269 Prf269	prf269@tms.com		
prf27 prf27	prf27@zycus.com	Naheola - CPG	
Prf270 Prf270	prf270@tms.com		
Prf271 Prf271	prf271@tms.com		
Prf272 Prf272	prf272@tms.com		

At the bottom of the table, there is a 'Display 10 Records' option and a pagination control showing 'Page 25 of 61'.

- Click  corresponding to a user name to assign facilities to that user. The **Assign Facilities** page is displayed.

Assign Facilities
X

<input type="checkbox"/>	Facility Name
<input type="checkbox"/>	Default - Facility
<input type="checkbox"/>	Fayette - CNS
<input type="checkbox"/>	Huntsville - Packaging
<input type="checkbox"/>	Peterman - Plywood
<input type="checkbox"/>	Taladega - Plywood
<input type="checkbox"/>	Naheola - CPG
<input type="checkbox"/>	Thorsby - Laminated Lumber
<input type="checkbox"/>	Crossett - Plup & Paper
<input type="checkbox"/>	Crossett - Plywood & Studmill
<input type="checkbox"/>	Crossett - Chemical

Display Records
Page of 17

- Select the facilities and click **Assign**. The facilities are assigned to that user.
- Enter text in the search box and click **Go** to search users.

1.3.1.2 Entity Ownership

You can change the ownership of various types of entities present in the system. You can change the ownership of KPIs, Scorecards, Events, Development Programs and Alerts, from the current owner to a new owner. You can also view the previous owner to whom the entity was assigned.

To change the ownership:

- On the left pane, under **User Settings** section, click on **Entity Ownership**

You are here : Client Settings

Settings

Change Entity Ownership

You can change the ownership of various Entities here. The change in ownership can take place in bulk or by selecting Individual Entity.

Search Current Owner

Current Owner	Entity Types Owned	Action
abc qa	KPIs Development Programs	
admin admin	KPIs Events Alerts	
ashish ashish	KPIs	
ashish chaudhari	KPIs Scorecards Events Development Programs	
ashish chaudhari	KPIs Scorecards Events Alerts Development Programs	
Bijal Vasa	KPIs Scorecards Events Alerts Development Programs	
Chitresh Chitresh	Scorecards	
Chitresh2 Jain	Events Development Programs	
Hardik Hardik	Events	

- On **Entity Ownership** screen, click on (Edit) under **Action** section for the Current Owner whose entity needs to be transferred.


Change Owner (of Entities belonging to 'Bijal Vasa')

Current Owner: **Bijal Vasa**

New Owner: *

Entities Owned By:

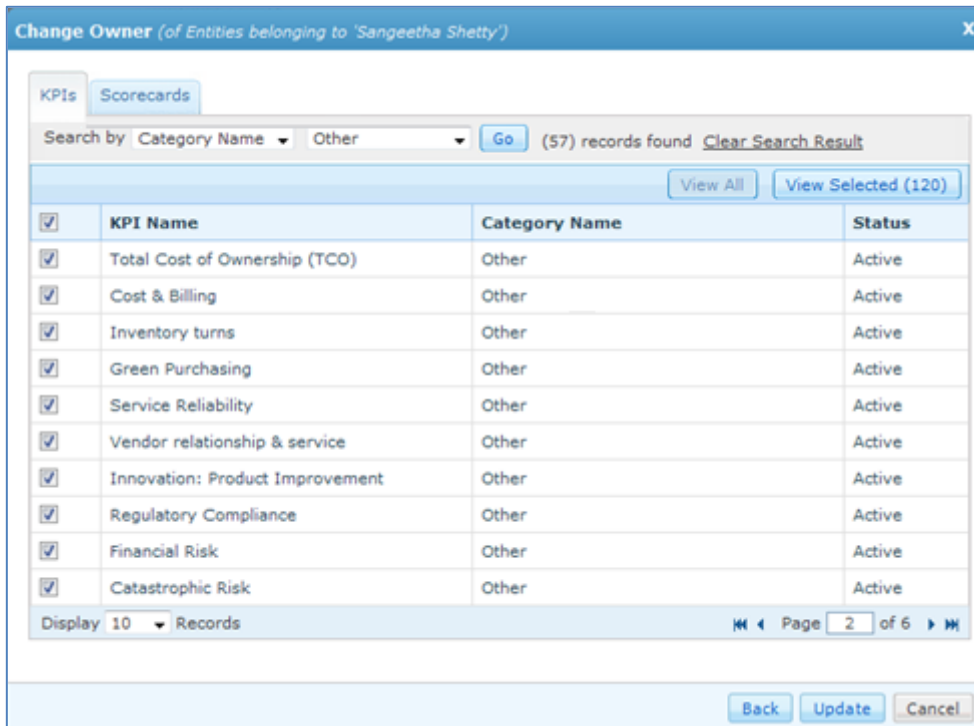
Current Owner	New Owner
Entities	Entities
KPIs Scorecards Events Alerts Development Programs	

3. From the **New Owner** drop down menu, select the new owner on whose name the ownership needs to be transferred.
4. Select the entities to be transferred from the current owner to new owner and click on . The selected entities will be transferred to the corresponding **New Owner** section.

Note: You can select multiple entities by pressing the Ctrl button on the keyboard.

Note: An entity can be transferred to the new owner only if the new owner has the appropriate rights to own such an entity.

5. Click **Next**.

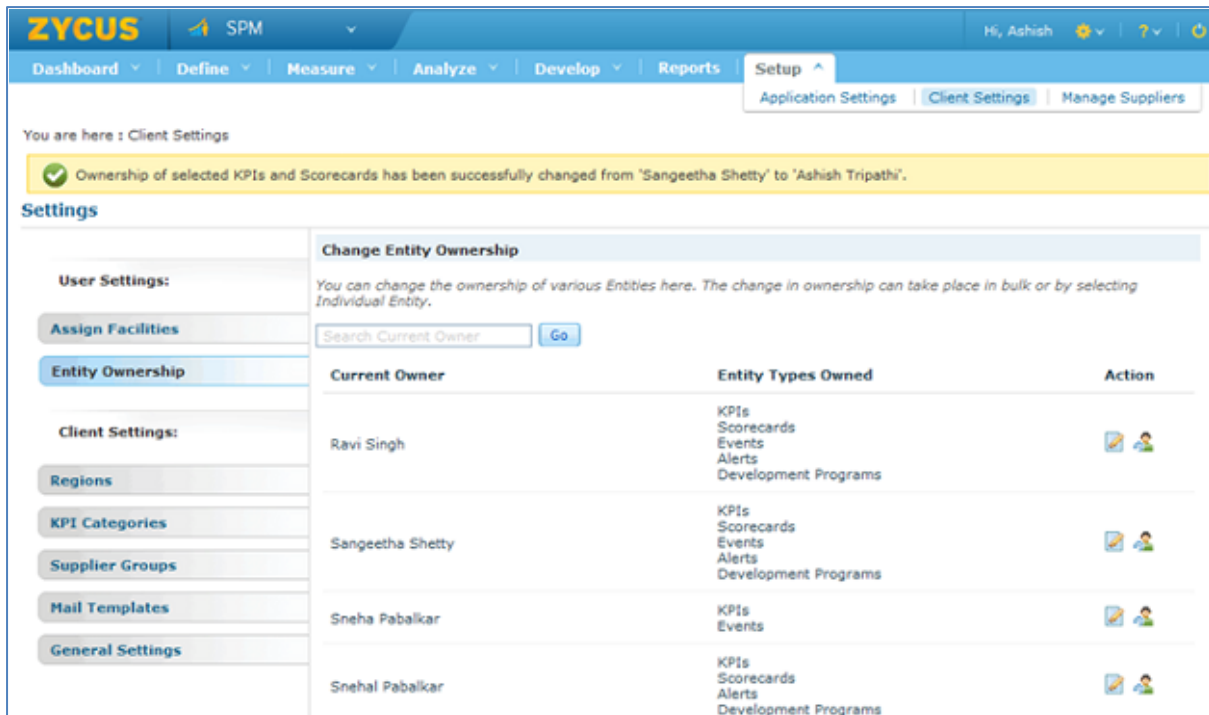


The screenshot shows a window titled "Change Owner (of Entities belonging to 'Sangeetha Shetty')". It has two tabs: "KPIs" and "Scorecards". Below the tabs is a search bar with "Search by" set to "Category Name" and "Other" selected. A "Go" button is next to it, followed by "(57) records found" and a "Clear Search Result" link. Below the search bar are "View All" and "View Selected (120)" buttons. The main area contains a table with the following data:

<input checked="" type="checkbox"/>	KPI Name	Category Name	Status
<input checked="" type="checkbox"/>	Total Cost of Ownership (TCO)	Other	Active
<input checked="" type="checkbox"/>	Cost & Billing	Other	Active
<input checked="" type="checkbox"/>	Inventory turns	Other	Active
<input checked="" type="checkbox"/>	Green Purchasing	Other	Active
<input checked="" type="checkbox"/>	Service Reliability	Other	Active
<input checked="" type="checkbox"/>	Vendor relationship & service	Other	Active
<input checked="" type="checkbox"/>	Innovation: Product Improvement	Other	Active
<input checked="" type="checkbox"/>	Regulatory Compliance	Other	Active
<input checked="" type="checkbox"/>	Financial Risk	Other	Active
<input checked="" type="checkbox"/>	Catastrophic Risk	Other	Active

At the bottom of the table, there is a "Display 10 Records" dropdown and a pagination control showing "Page 2 of 6". At the very bottom of the window are "Back", "Update", and "Cancel" buttons.

6. Select the particulars from each entity (KPI, Scorecard etc.) and then click on **Update** to transfer the ownership.

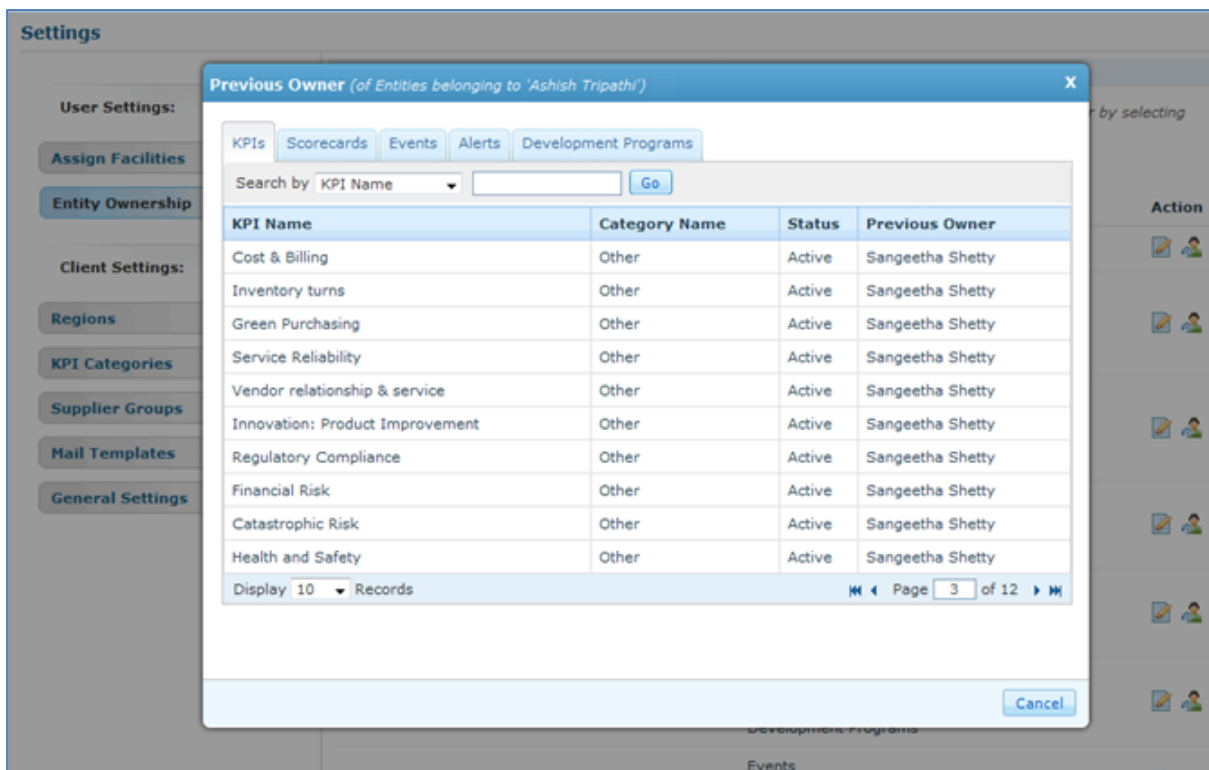


7. The system shows a confirmation message upon the successful ownership change.

Note: Once the ownership is transferred, the corresponding mail communication would now take place with the new owner.

To view previous owner:

1. On **Entity Ownership** screen, click on (Previous Owner) under **Action** section to view the previous owner of the entities for the corresponding **Current Owner**.



1.3.2 Client Settings

1.3.2.1 Adding Regions

You can add regions that your company operates in and then associate the various Facilities to the Regions they fall under. Each facility can be assigned to one or more regions. Just like the supplier performance can be viewed for different facilities, it can now be viewed per region as well.

To add a region:

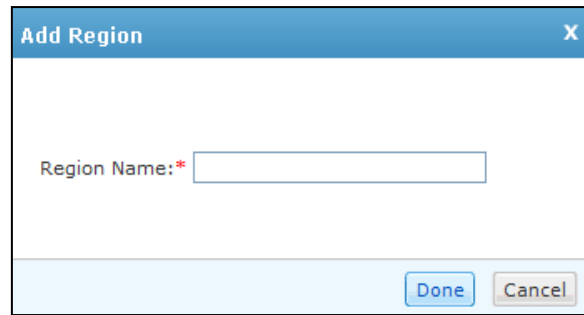
1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **Regions**.
4. Click **Add Region** tab on the upper right of the **Region and Facility Mapping** page.

The screenshot shows the ZYCUS SPM interface. The top navigation bar includes 'Setup' with sub-options 'Client Settings' and 'Manage Suppliers'. The breadcrumb trail indicates 'You are here : Client Settings'. The main content area is titled 'Region and Facility Mapping' and includes an 'Add Region' button. Below this is a table with the following data:

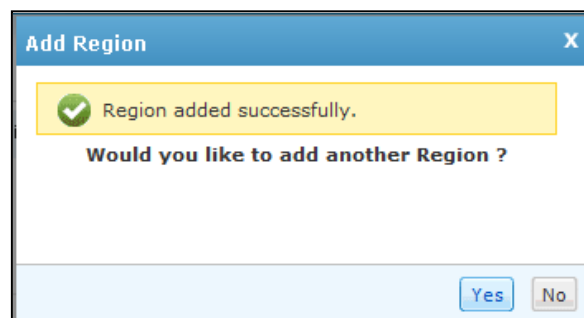
Region	Facilities Associated	Action
APAC	Naheola - CPG Taladega - Plywood Crossett - Plup & Paper Thorsby - Laminated Lumber Default - Facility Fayette - CNS Huntsville - Packaging Peterman - Plywood	[Edit Icon]
US	Crossett - Plup & Paper Chicago Crossett - Plywood & Studmill Oklahoma City Houston	[Edit Icon]
WSE	Peterman - Plywood Taladega - Plywood Naheola - CPG Crossett - Chemical Crossett - Plywood & Studmill Huntsville - Packaging	[Edit Icon]
NE	Crossett - Chemical Crossett - Plywood & Studmill Huntsville - Packaging	[Edit Icon]
MEA	Peterman - Plywood Fayette - CNS Camas - CPG Taladega - Plywood	[Edit Icon]
CEE	Naheola - CPG Thorsby - Laminated Lumber	[Edit Icon]


5. The **Add Region** dialog box is displayed.

Enter a name
for the region



6. Enter the region name and click **Done**.
7. The following message is displayed.



8. Click **Yes** to add another region. The region is added and is displayed on the **Region and Facility Mapping** page.
9. Click  to assign facilities to the region.

1.3.2.2 Adding/Editing KPI Categories

The KPI categories are populated in the drop down list for KPI Category on the KPI creation screen. A KPI category already associated to a KPI cannot be deleted. You can add KPI categories or Edit/Delete existing ones.

Note: You can deactivate KPI categories that you no longer need. These KPIs will be hidden from the KPI Category selection drop down on the first step of KPI creation. You can deactivate or re-activate a KPI at any time. The Active KPIs using the deactivated KPI will not be affected unless they are edited.

To add/edit KPI categories:

1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **KPI Categories**.
4. Click **Add Category** tab on the upper right of the **KPI Categories** page.

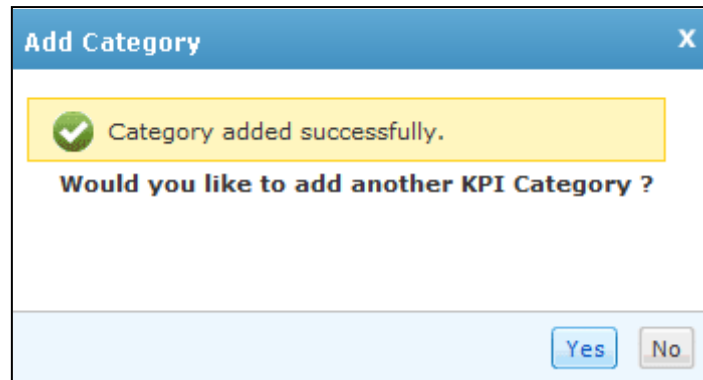
The screenshot shows the ZYCUS SPM interface. The top navigation bar includes 'Dashboard', 'Define', 'Measure', 'Analyze', 'Develop', 'Reports', and 'Setup'. The 'Setup' menu is expanded, showing 'Client Settings' and 'Manage Suppliers'. The main content area is titled 'Settings' and 'Client Settings'. On the left, there is a sidebar with various settings categories: User Settings (Assign Facilities, Entity Ownership), Client Settings (Regions, KPI Categories, Supplier Groups, Mail Templates, General Settings), and General Settings. The 'KPI Categories' section is active, displaying a table of categories. The table has columns for 'KPI Category' and 'Action'. The categories listed are: Other, Cost, Delivery, Efficiency, Health, Safety and Environment, Innovation, Quality, Risk, Service, and erwr. Each category has an 'Add', 'Edit', and 'Delete' icon. Below the table, there is a 'Display 25 Records' option and a pagination control showing 'Page 1 of 1'. The footer includes the ZYCUS logo and copyright information: 'Copyright © 2013 Zycus Inc. All Rights Reserved'.




5. The **Add Category** dialog box is displayed.

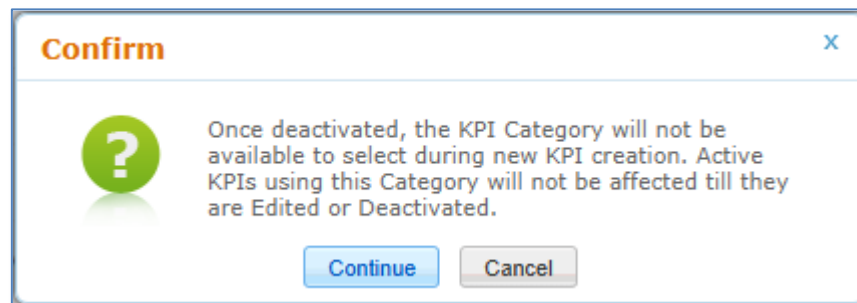
The screenshot shows the 'Add Category' dialog box. It has a title bar with 'Add Category' and a close button (X). The main area contains a text input field labeled 'Category Name: *'. A red callout bubble points to the input field with the text 'Enter a name for the category'. At the bottom right, there are two buttons: 'Done' and 'Cancel'.


6. Click **Done**.

7. The following message is displayed.



8. Click **Yes** to add another category. The category is added and is displayed on the **KPI Categories** page.
9. Click  to update a category.
10. Click  to deactivate a category and  to activate a category. On clicking the deactivate icon, the following message will be displayed.



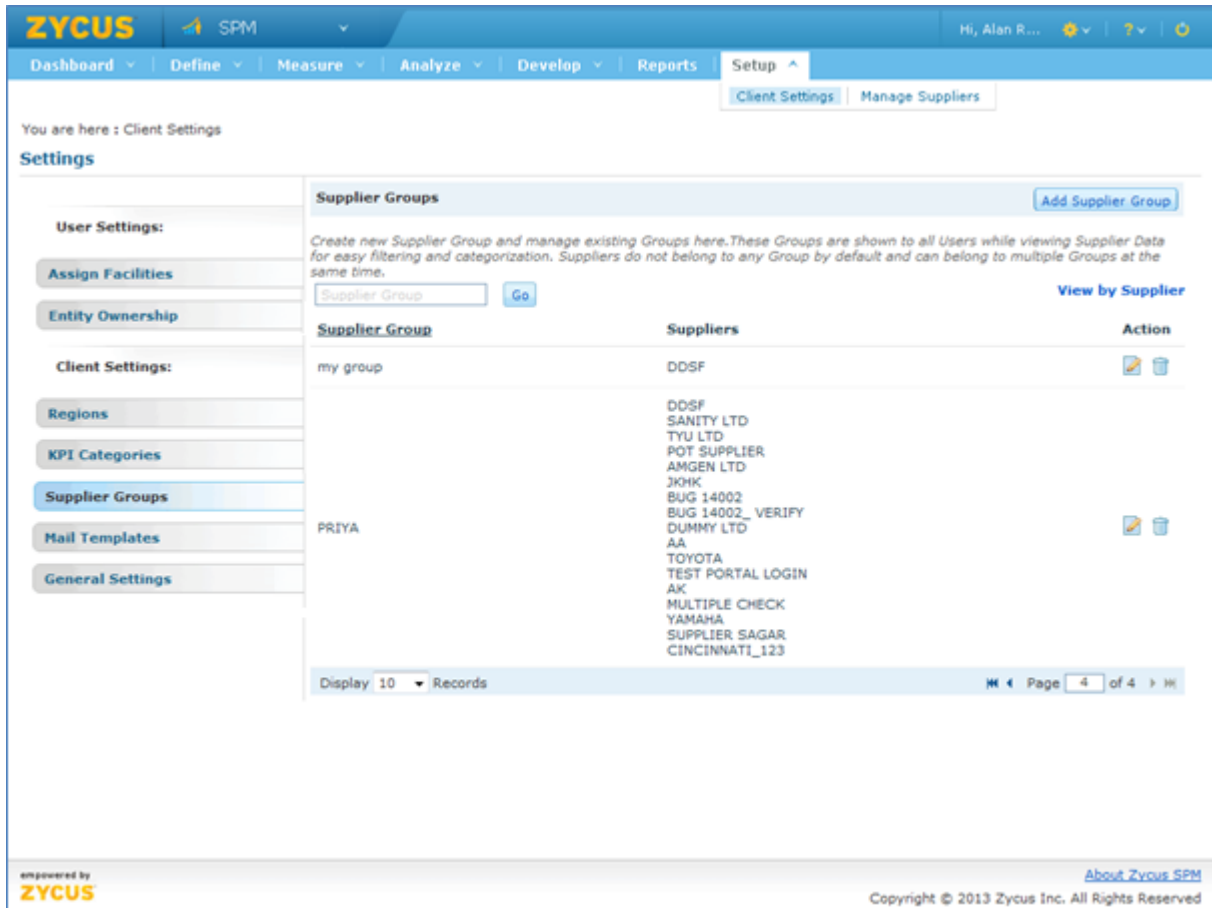
11. Click  to delete a category.

1.3.2.3 Adding Supplier Groups

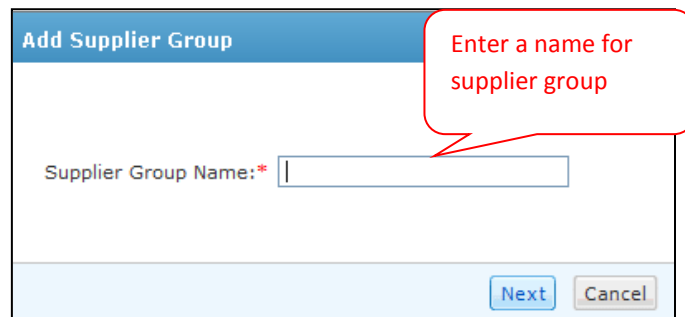
You can create and manage Supplier Groups. Each supplier can be associated with one or more Groups. Supplier data can be filtered and sorted by Groups when analyzing Supplier Information.

To assign facilities:

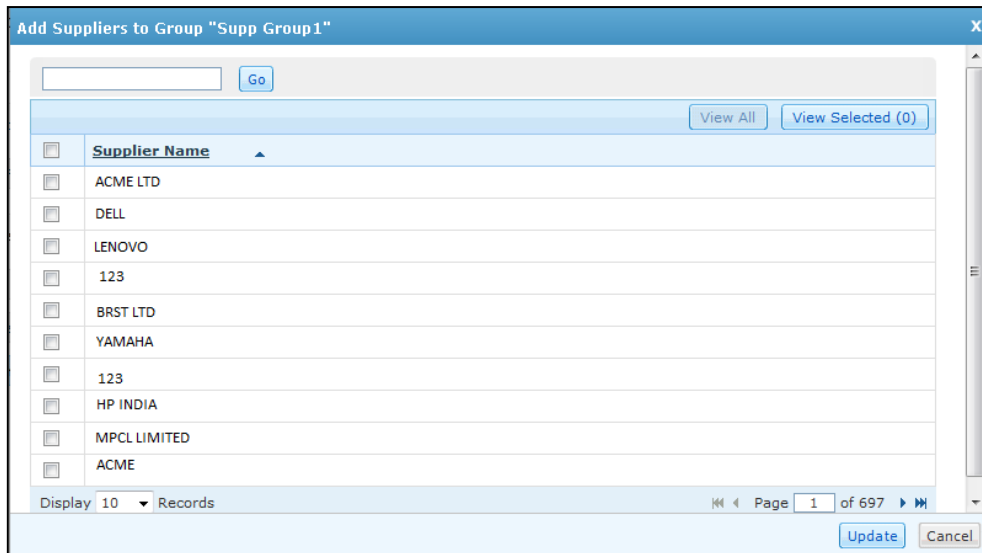
1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **Supplier Groups**. The following page is displayed.





4. Click **View by Supplier** to sort the display list by supplier names.
5. Click **Add Supplier Group**. The following **Add Supplier Group** dialog box is displayed.



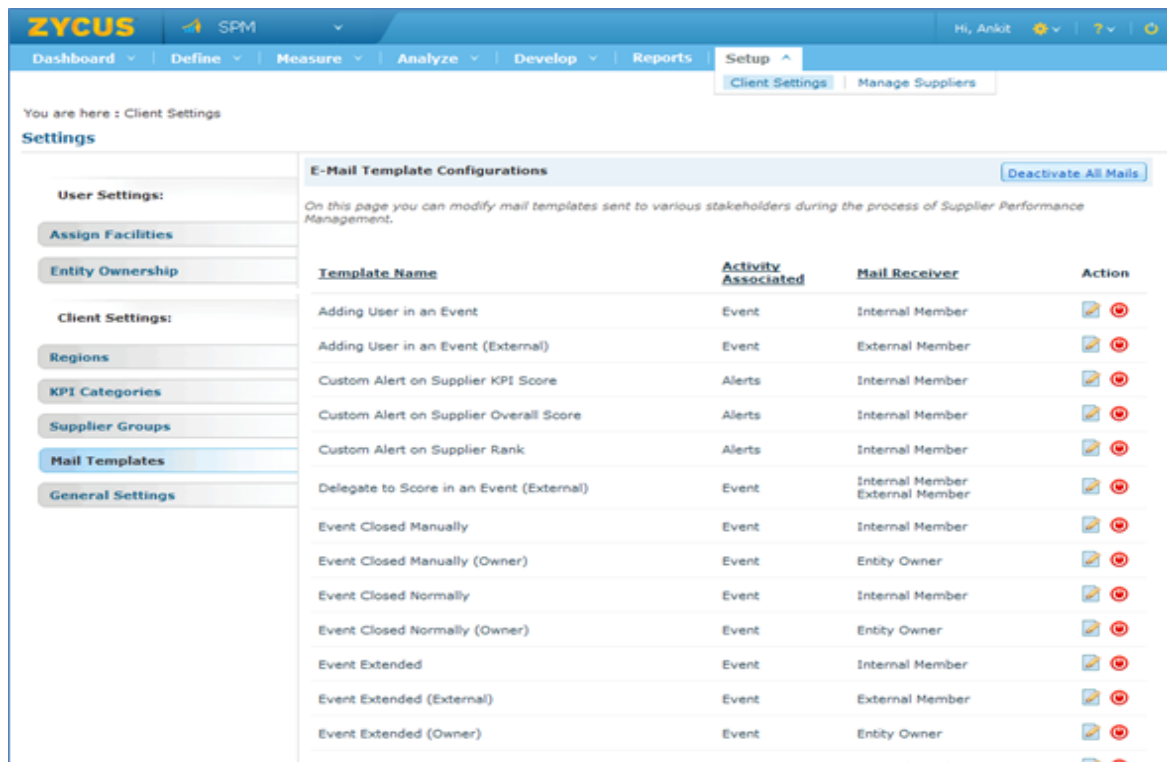
6. Click **Next**. The following **Adding Suppliers to Group** page is displayed.



7. Select the suppliers you wish to add to the group from the list.
8. Click **Update**. The supplier group is added and is displayed on the **Supplier Groups** page.
9. Click  Edit to update a supplier group.
10. Click  Delete to delete a supplier group.

1.3.2.4 Configuring Mail Templates

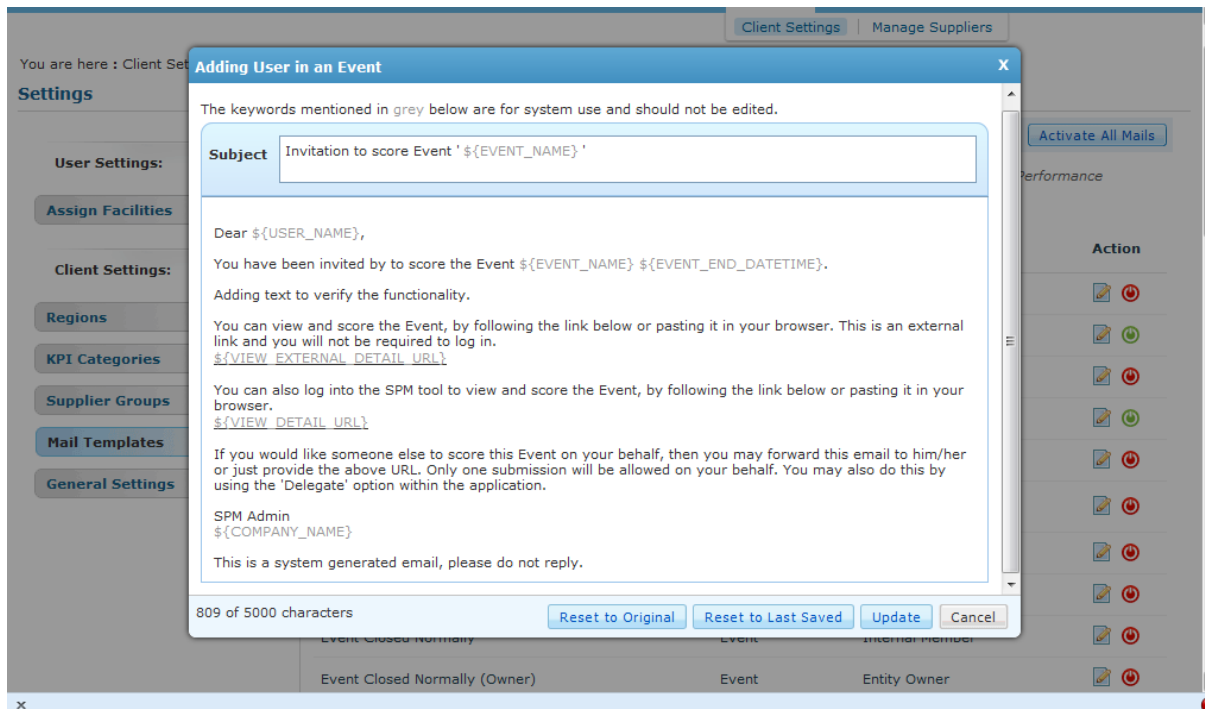
Under Mail Templates, you can modify the email templates sent to various stakeholders during the process of Supplier Performance Management.



You can edit the content of individual template at any point in time. You can also Activate or Deactivate emails sent by the system.

To edit a mail template:

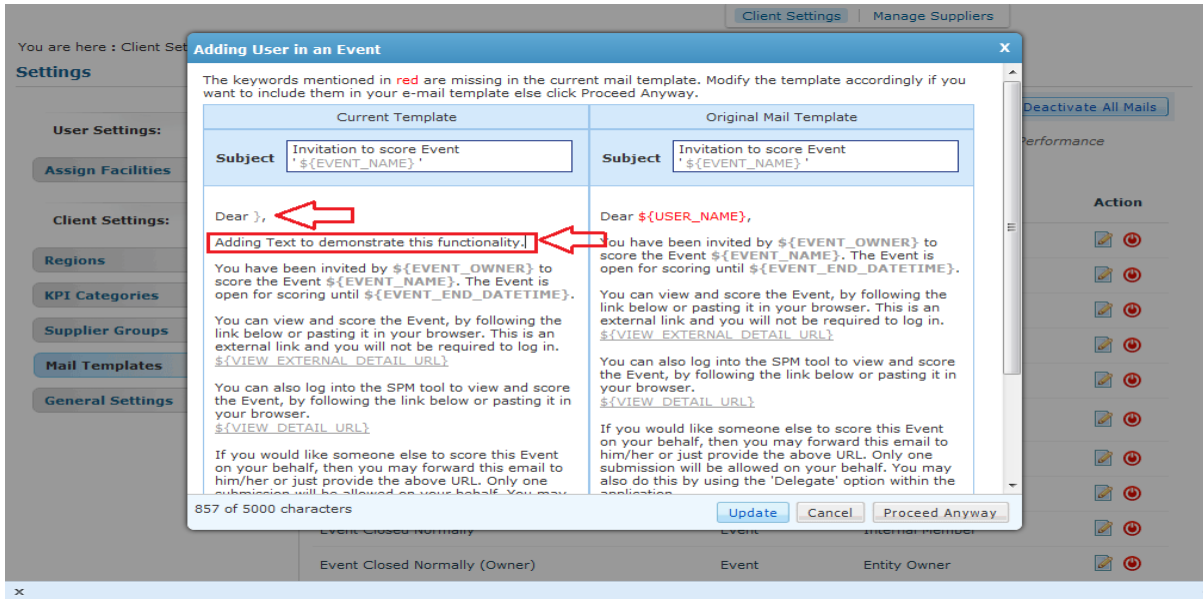
1. For a corresponding email template, under **Actions** section, click on . A popup is displayed.



In this popup, you will get to view the text of the template for the corresponding action.

2. Edit the text of template as required and click **Update**.
3. Click **Reset to Original** to reset the text of the template to the original state.
4. Click **Reset to Last Save** to reset the text of the template to the last saved state.


Note: *The mail template consists of a number of keywords which are necessary for system use. In case you modify any keyword and try to update the template, the system would check and highlight (in Red) the missing keywords in the mail template as shown below:*

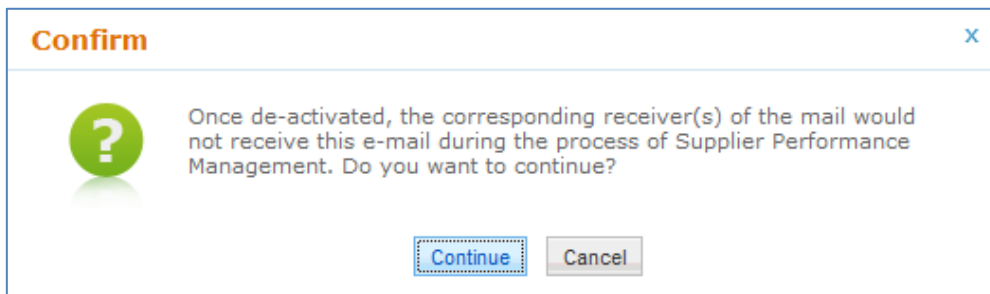


5. Click **Cancel** to cancel the update and go back to the **Mail Templates** listing screen.
6. Click **Proceed Anyway** to update the mail template with the missing keyword.


To Activate/Deactivate mail template:

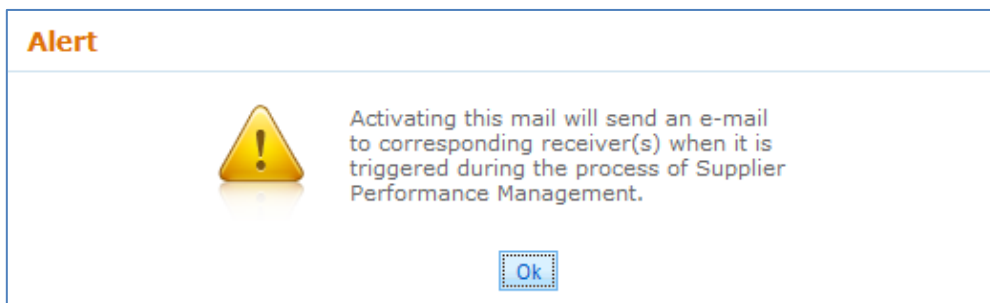
For a corresponding event, under Actions section, click on any of the following:

 : Click this option to deactivate email for the corresponding event. Once you click this option the following message is displayed:



Click **Continue** to deactivate the email for the corresponding event.

 : Click this option to activate email for the corresponding event. Once you click this option the following message is displayed:



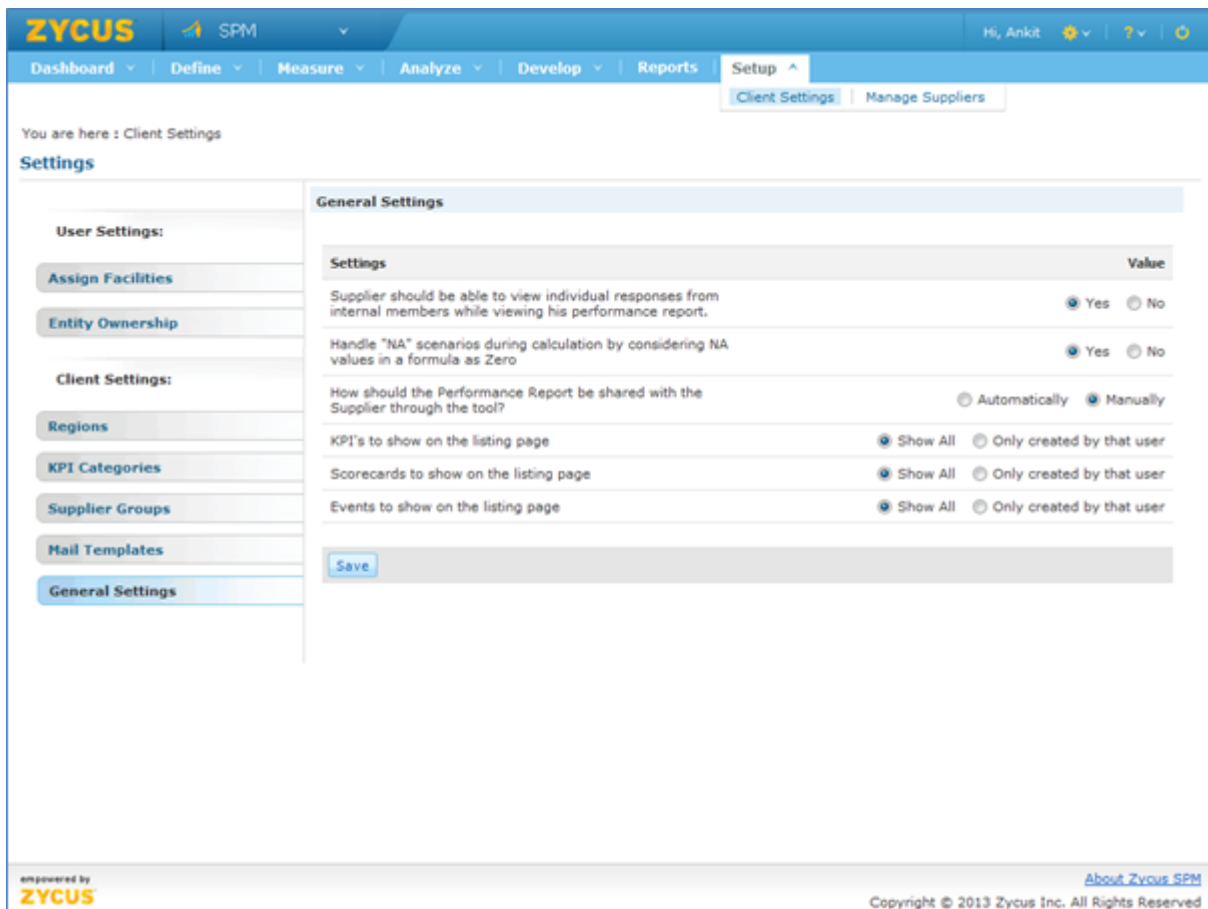
Click **Ok** to activate the email for the corresponding event.

1.3.2.5 Configuring General Settings

You can control whether on the Supplier Portal, the Supplier should be able to see individual responses from all respondents or only the basic Performance Report. This setting can be turned On or Off at any time by the Admin.

To configure general settings:

1. Click **Setup** tab.
2. Under **Setup** tab, click **Client Settings**.
3. On the left pane, under **Client Settings** section, click **General Settings**. The following page is displayed.



The screenshot shows the ZYCUS SPM interface. The top navigation bar includes 'Dashboard', 'Define', 'Measure', 'Analyze', 'Develop', 'Reports', and 'Setup'. The 'Setup' tab is active, and the 'Client Settings' sub-tab is selected. The breadcrumb trail indicates 'You are here : Client Settings'. The left sidebar shows 'Settings' with a sub-section 'Client Settings' containing 'Regions', 'KPI Categories', 'Supplier Groups', 'Mail Templates', and 'General Settings' (which is highlighted). The main content area is titled 'General Settings' and contains a table of settings:

Settings	Value
Supplier should be able to view individual responses from internal members while viewing his performance report.	<input checked="" type="radio"/> Yes <input type="radio"/> No
Handle "NA" scenarios during calculation by considering NA values in a formula as Zero	<input checked="" type="radio"/> Yes <input type="radio"/> No
How should the Performance Report be shared with the Supplier through the tool?	<input type="radio"/> Automatically <input checked="" type="radio"/> Manually
KPI's to show on the listing page	<input checked="" type="radio"/> Show All <input type="radio"/> Only created by that user
Scorecards to show on the listing page	<input checked="" type="radio"/> Show All <input type="radio"/> Only created by that user
Events to show on the listing page	<input checked="" type="radio"/> Show All <input type="radio"/> Only created by that user

A 'Save' button is located at the bottom of the settings table.

4. For **Supplier should be able to view individual responses from internal members while viewing his performance report**, select **Yes** to turn on the setting or select **No** to turn off the setting.
5. For **Handle NA scenarios during calculation by considering NA values in a formula as Zero**, select **Yes** to turn on the setting or select **No** to turn off the setting.

In case the tool encounters a NA as a score while calculating scores, it will resolve it in the following manner.

Sum: Ignore all NAs and take the sum of available values

Scenario 1: $24+16+NA = 40$

Scenario 2: $0+0+NA = 0$

Scenario 3: $NA+NA+NA = NA$ (But will be taken as 0 if it is a KPI score which will be used in Scorecard formula)

Average: Ignore all NAs and take the average, by also reducing the denominator.

If there are 5 questions and 1 is NA then KPI value would be $Q1+Q2+Q3+Q4/4$. Behavior will be same for the Scorecard formula as well.

Custom: This will remain NA as we cannot assume values to be Zero in case of a custom formula.

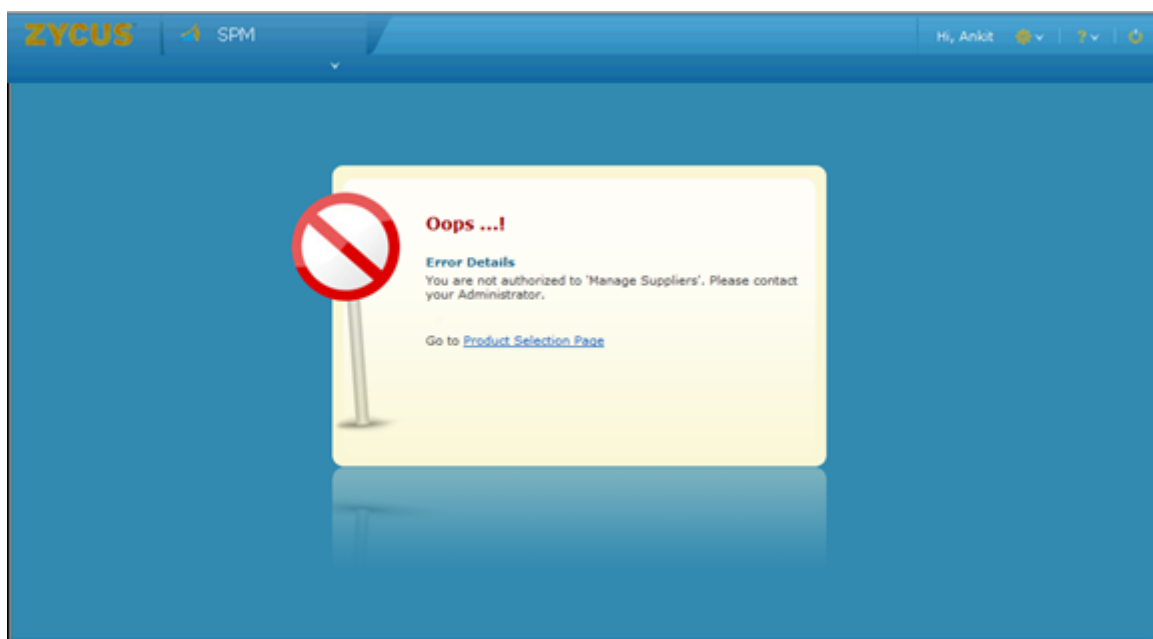
6. For **How should the Performance Report be shared with the Supplier through the tool**, select **Manually** to allow the users to manually share the report OR select **Automatically** to let the tool automatically share the report with the users once the event gets closed.

Note: You will be able to switch between the original behavior of the tool or the new behavior. On switching to the original behavior, when the tool encounters a NA in the formula, the final score would be NA.

1.4 Managing Suppliers

The **Manage Suppliers** sub-tab lets you create new suppliers and submit the supplier creation requests for approval.

Note: User must be authorized to manage suppliers. The following error message is displayed if not authorized.



To manage suppliers:

1. Under **Setup** tab, click **Manage Suppliers** sub-tab. The **Supplier Management** page is displayed.

Supplier Management Close

Create New Supplier

Search By:

GS ID	Supplier Name	Actions
15125	TEST REQ CO	
15124	TTQWEQWE	
15121	SAA ASDSD TEF	
15119	TEST 18277	
15113	TESTING SUPPLIER CREATION	
14111	HIDE OUT	
13110	Panasonic	
12110	PikPens	
11110	Whirlpool	
9109	BBC CORP	

Page 1 of 7

2. Click **Create New Supplier**. The following **Create Supplier** screen is displayed.

Create Supplier Close

Company | Address | Product & Services | Spend Information

You are in System : Client System Name 1 under PL001 - Alendale

Company Details

DBA/Alias

Supplier Hierarchy

Company Details

Global Supplier Identifier **Legal Name ***

DUNS Number

Tax Information

Tax ID / W8 / W9 form not required

Tax ID Format SSN Federal TAX ID Others W8/W9 Form

Tax ID W8/W9 Received Date

* indicates mandatory fields

3. Enter the required details. Under **Company Details**, **Legal Name** is a mandatory field.

Note: Each supplier has a unique Tax ID. If you enter the Tax ID in this screen, ensure it is the correct Tax ID which does not conflict with any of the prior created supplier Tax IDs. No two suppliers can be created with the same Tax ID. If that is the case, an error message will be shown as displayed.

4. Ensure you have entered the **Legal Name** and click **DBA/Alias** sub-tab. The following page is displayed.

Supplier Management [Close]

Company | Address | Product & Services | Spend Information

You are in System : Client System Name 1 under PL001 - Alendale

DBA / Alias

Alias Name *

Alias Type *

Has Separate Addresses? Yes No

Add To List [Submit] [Cancel] * indicates mandatory fields

Alias Name	Alias Type	Has Separate Addresses?
YAM	DBA	No

5. DBS/Alias **section is NON mandatory**. If you do need to add an Alias, only then the fields marked with Red asterisk are mandatory.
6. Fill the mandatory fields and click **Add To List**. The supplier is added and is displayed below.
7. Click **Address** tab. The **All Locations** is displayed.

Supplier Management [Close]

Company | Address | Product & Services | Spend Information

You are in System : Client System Name 1 under PL001 - Alendale

All Locations

Select Legal/DBA supplier name * YAMAHA

Choose address type here * HQ OA RT

Address 1 *

Address 2

Address 3

PO Box Number *

Country * United States

State *

City *

Zip / Postal Code *

Phone *

Fax

Add To List [Submit] [Cancel] * indicates mandatory fields
For fields, **Address1 and POBox**, at least one field should be filled.

HQ	OA	RT	Address	Phone	Fax	RT Address	Address ID	Show Facilities
Y	N	N	HIGH ST,USA, PO Box 54634, WRWE, AK, 34234, US	342355			236975	

8. Choose an address type and fill all the mandatory details. Click **Add To List**.
9. The address is added and is displayed on the list below.
10. Click **Contact Details** sub-tab. The following page is displayed.

The screenshot shows the 'Supplier Management' interface with the 'Address' tab selected. The breadcrumb trail indicates the user is in 'System : Client System Name 1 under PL001 - Alendale'. On the left, there are navigation options for 'All Locations', 'Contact Details', and 'My Locations'. The main area contains a form titled 'Showing Contact Details for All Locations' with the following fields: 'For Address *' (dropdown), 'Contact Type *' (dropdown), 'First Name *', 'Last Name *', 'Title *', 'Email *', 'Phone Number', 'Cell Number', 'Fax', 'Supplier Portal Access?' (radio buttons for Yes/No), and 'Portal Login Status'. An 'Add To List' button is highlighted with a red box. Below the form is a table with the following data:

For Address	Contact Type	First Name	Last Name	Title	Email	Phone Number	Cell Number	Fax	Supplier Portal Access?	Portal Login Status
236975	Prc	abc	xyz	Mr.	g@fgdf.com				No	--

11. Enter the mandatory fields and click **Add To List**. The details get added and are displayed on the list.

Note: For Supplier creation, filling information under **Company** and **Address** tabs is mandatory.

12. Click **Product & Services** tab. The following page is displayed.

The screenshot shows the 'Supplier Management' interface with the 'Product & Services' tab selected. The breadcrumb trail remains the same. The left navigation pane shows 'Product & Services' selected. The main area contains a form with a text input field and a 'Classify' button. Below the input field is a link: 'Select Category by Searching Taxonomy'. Underneath is a table titled 'Selected Product & Services' with the following columns: 'CATEGORY ID', 'CATEGORY CODE', and 'CATEGORY NAME'. The table is currently empty. 'Submit' and 'Cancel' buttons are at the bottom left.

Note: Filling Spend Information is not mandatory for supplier creation. However, if you start filling, fill all the mandatory fields.

13. Enter a product description and click **Classify**.

14. Click **Spend Information**. The following page is displayed.

Note: Filling Spend Information is not mandatory for supplier creation. However, if you start filling, fill all the mandatory fields.

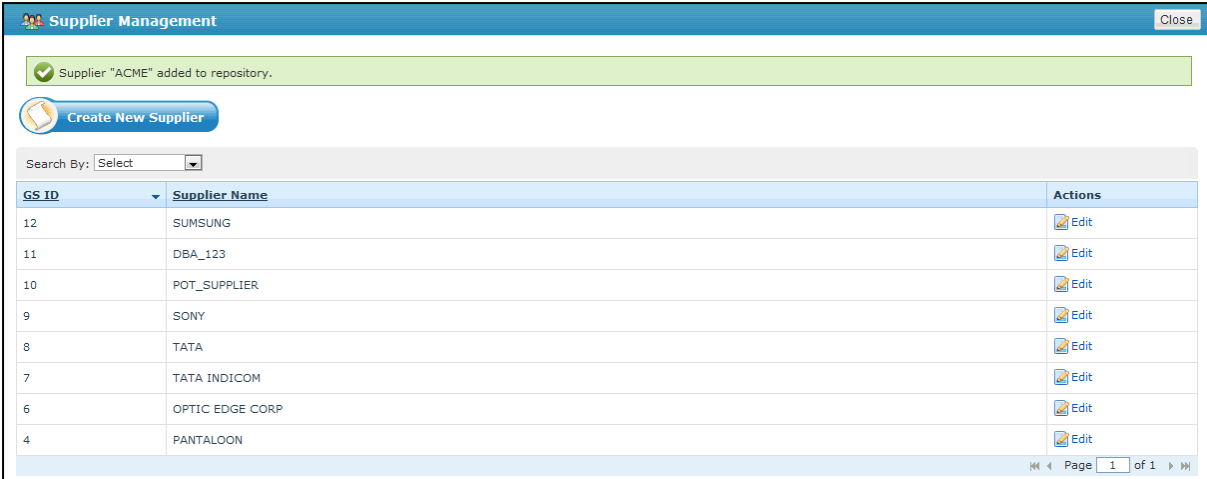
15. Enter the details and click **Add To List**.

16. Click **Spend Information** sub-tab. The following page is displayed.









17. Click **Address** tab. Select **My Locations** sub-tab. The following page is displayed.

Address Id	Supplier Name	Address	HQ	OA	RT	Use Address In Facility
236975	YAMAHA	HIGH ST,USA, PO Box 54634, WRWE, AK, 34234, US	Y	N	N	<input type="checkbox"/>


18. Click **Submit**. The supplier is added and is displayed on the **Supplier Management** screen.



The screenshot shows the 'Supplier Management' interface. At the top, there is a blue header bar with the title 'Supplier Management' and a 'Close' button. Below the header, a green notification bar states 'Supplier "ACME" added to repository.' A blue button labeled 'Create New Supplier' is visible. Below this, there is a search bar with a dropdown menu labeled 'Search By: Select'. The main content is a table with three columns: 'GS ID', 'Supplier Name', and 'Actions'. The table lists several suppliers, each with an 'Edit' button in the 'Actions' column. At the bottom right of the table, there is a pagination control showing 'Page 1 of 1'.

GS ID	Supplier Name	Actions
12	SUMSUNG	 Edit
11	DBA_123	 Edit
10	POT_SUPPLIER	 Edit
9	SONY	 Edit
8	TATA	 Edit
7	TATA INDICOM	 Edit
6	OPTIC EDGE CORP	 Edit
4	PANTALOON	 Edit

19. Select **GS ID** or **Supplier Name** from the **Search By** drop down list to search a supplier.

20. Click  **Edit** corresponding to the supplier you wish to edit the details of.