KNORR-BREMSE

SRM – Supplier Relationship Management Training Document

Training document: Structure & Overview

What is it?

This document will guide users through general information and specific topics and serves as a handbook for further functionalities by using "Use Cases" as guidance.
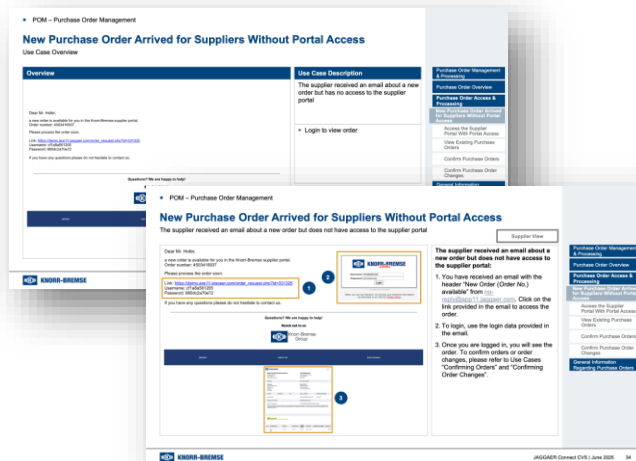
What is a Use Case?

A use case illustrates possible functionalities and provides step-by-step guidance.

How are Use Cases structured?

Use Cases include one slide with main information as overview, followed by a detailed click guide.

Use Case Overview	Overview of the use case content including description, content, notes, and screenshot
Headline	A brief introduction to the use case
System View	Shows screenshots for the related step
Click Guide	Detailed guidance through the functionalities
Note	Relevant information to the use case

Example for: Structure, Use Cases and Click Guide

*Visible functions/buttons may differ depending on the roles & rights assigned

Supplier Relation Management - Registration

In this chapter we will see…

- Supplier 360° Dashboard
- Initial Supplier Registration
- Navigation supplier portal
- Provide basic supplier information
- Small supplier profile
- Big supplier profile
- Small supplier profile processing
- Big supplier profile processing
- Benchmark Supplier: Trigger invitation to big profile

Supplier 360° Dashboard

Use Case Overview

Overview

Use Case Description

Learn how to navigate the Supplier 360° Dashboard.

■ Supplier 360° Dashboard

Notes

■ The Dashboard can vary between users because of its customization characteristics.

Initial Supplier Registration

Use Case Overview

Overview

Use Case Description

Learn how to initially register to the JAGGAER Connect supplier portal.

■ Personal Data
■ Company Data
■ Consent

Notes

■ The Dashboard can vary between users because of its customization characteristics.

Initial Supplier Registration

How to register in the JAGGAER Connect supplier portal

Supplier View

How to register in the JAGGAER Connect supplier portal:

1. To register on the Supplier portal. Click the link.

2. Click "English", to start the registration process.

Initial Supplier Registration

How to register in the JAGGAER Connect supplier portal

Supplier View

How to register in the JAGGAER Connect supplier portal:

1. Provide your contact information and choose a Login name for the JAGGAER Connect supplier portal.

2. Then click "Continue".

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Initial Supplier Registration

How to register in the JAGGAER Connect supplier portal

Supplier View

How to register in the JAGGAER Connect supplier portal:

1. Provide all mandatory (marked by an asterisk *) and optional company data information.

2. If you have a DUNS number, enter the number into the field or click the "D&B look-up" link to verify your DUNS number with Dunn & Bradstreet.

3. Then click continue.

Initial Supplier Registration

How to register in the JAGGAER Connect supplier portal

Supplier View

How to register in the JAGGAER Connect supplier portal:

1. To register for the JAGGAER Connect supplier portal, please review the Supplier Access Terms of JAGGAER. Only if you agree and accept the terms, check the box.
   If you agree to be found via the JAGGAER Supplier Network, also check the second box.
   Then click "Accept and Submit".

2. Now you successfully registered on the JAGGAER Connect supplier portal. You can open the link on the website to proceed to the login page.

3. Simultaneously, you receive an email by JAGGAER Connect, providing you with the Login name, you have chosen before, as well as an initial password. You can also use the link in the email to proceed to the login page.

Initial Supplier Registration

How to log in to the JAGGAER Connect supplier portal

Supplier View

How to log in to the JAGGAER Connect supplier portal:

1. Type in the login name and password, provided to you in the email.

If you have not received an email:

2. Check your spam folder for an email by no-reply@app11.jaggaer.com.

3. Go to https://app11.jaggaer.com/portals/kb_truck and request a password request with your email and the Login name, you set before.

4. Contact your CVS contact to restart the process

Initial Supplier Registration

How to request a new password

Supplier View
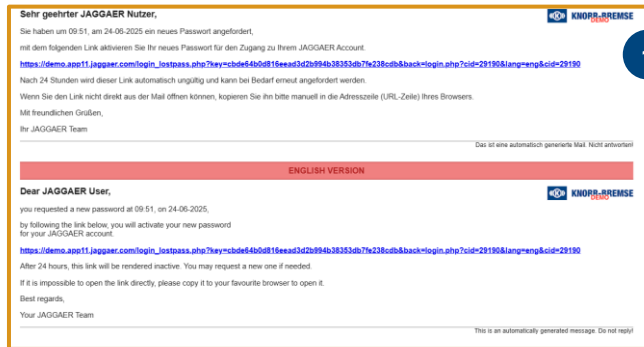
How to request a new password:

1. After requesting a new password, you will receive an email with a reset link. Please click the link.

2. Create a new password to access the JAGGAER Connect supplier portal. For security reasons, the password must fulfil the following criteria:

   ▪ Not one of the last 3 passwords
   ▪ Minimum of 8 characters
   ▪ Minimum of 1 special character (not A-Z or a-z or 0-9)
   ▪ Minimum of 1 number
   ▪ Minimum of 1 lower case letter and 1 upper case letter

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

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Initial Supplier Registration

How to log in to the JAGGAER Connect supplier portal

How to log in to the JAGGAER Connect supplier portal:

For your initial login, you will be asked to set a new password.

1. Create a new password to access the JAGGAER Connect supplier portal. For security reasons, the password must fulfil the following criteria:

- Minimum of 8 characters
- Minimum of 1 special character (not A-Z or a-z or 0-9)
- Minimum of 1 number
- Minimum of 1 lower case letter and 1 upper case letter

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

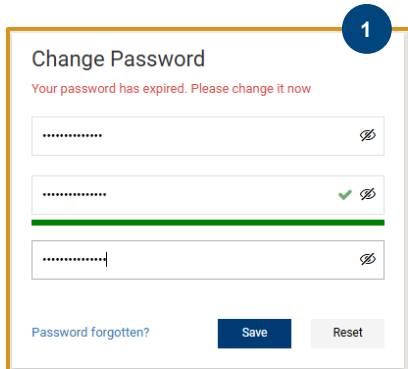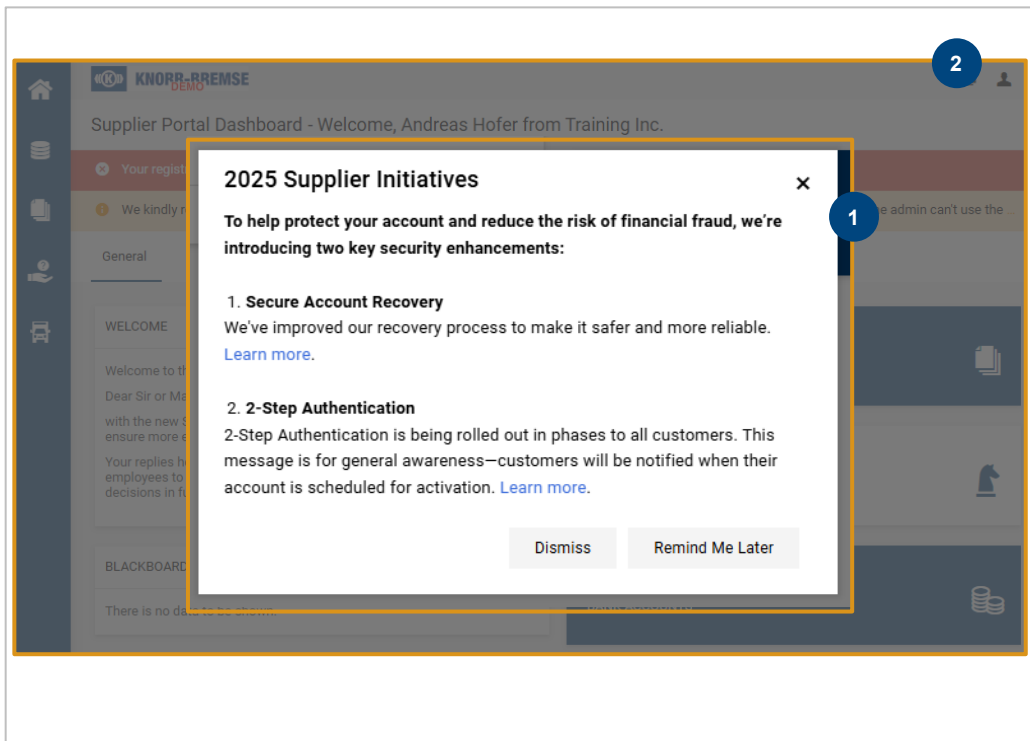Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Initial Supplier Registration

How to log in to the JAGGAER Connect supplier portal

How to log in to the JAGGAER Connect supplier portal:

1. When you log in for the first time, please take note of the information on the key security enhancements and click on "Learn more". Then click "Dismiss" or "Remind Me Later" to continue.

2. You successfully logged in to the JAGGAER Connect supplier portal.

Navigation supplier portal

Use Case Overview

Overview

Use Case Description

Learn how to orient yourself within JAGGAER Connect supplier portal.
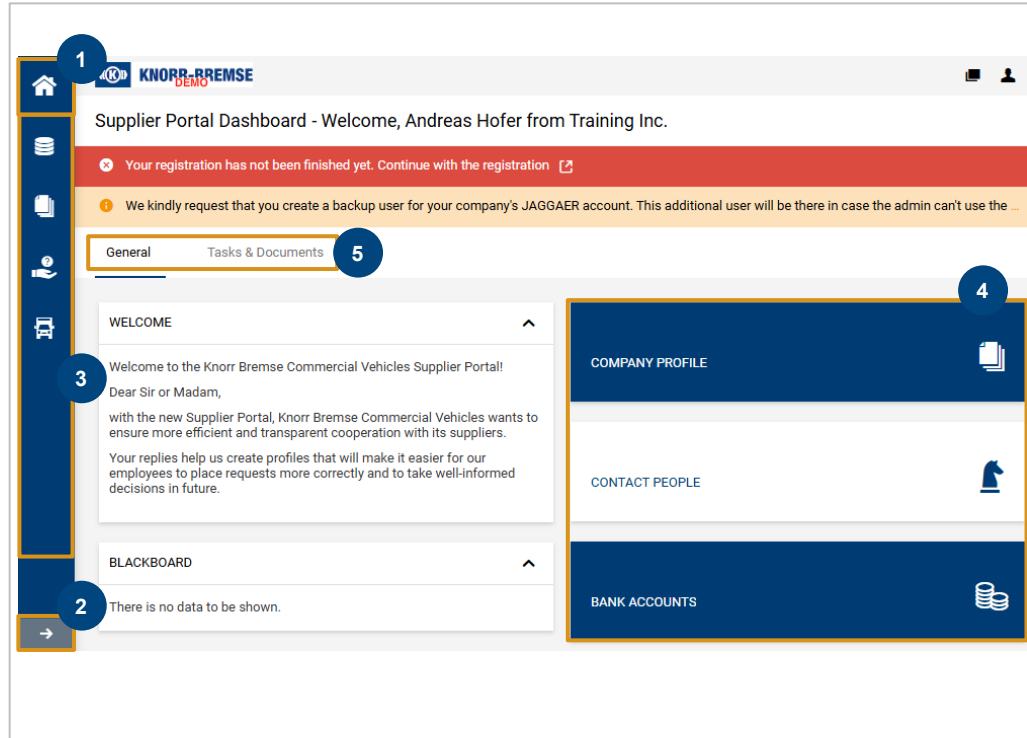
- Navigation in the JAGGAER Connect supplier portal

Notes

- The Dashboard can vary between users because of its customization characteristics.

Navigation supplier portal

How to navigate through JAGGAER Connect

How to navigate through the JAGGAER Connect supplier portal:

After logging in, you will land on the "Supplier portal" Dashboard:

1. Click on the home icon to return to the Supplier Portal Dashboard any time.

2. Expand the navigation bar by clicking the arrow to display descriptions next to the icons. Click the arrow again to minimize it.

3. The navigation bar contains several icons that provide access to different functionalities – one way to navigate through the modules.

4. Alternatively, you can use the tiles to access important modules.

5. Switch to "Tasks & Documents" to find an overview over Orders, RFQs, Actions and Documents, shared with you by CVS.

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Provide basic supplier information

Use Case Overview

Overview

Use Case Description

Learn how to provide basic company data when registering as a supplier via the JAGGAER Connect supplier portal.

- Company Base Data
- Company Bank Data
- Contacts
- Roles
- Categories

Notes

- The Dashboard can vary between users because of its customization characteristics.
- Suppliers can provide their production capabilities by choosing additional sub-categories. However, CVS must check and set the correct categories.

Provide basic supplier information

How to get qualified as a supplier

Supplier View

How to get qualified as a supplier:

To finish the internal qualification process, you need to review and update some base data and later submit a supplier profile.

1. When you have not submitted a supplier profile before, a red box will ask you to do so. Click on the link in this box.

2. Alternatively, you can enter and update the data via the tiles on the main page.

3. It is also possible to open it via the navigation bar's primary data tab.

Provide basic supplier information

How to update the company's base data

Supplier View

How to update the company's base data:

1. Check and correct your Company Data.

2. Switch to the Bank data tab.

3. Click "Add Bank Account".

4. Then click "Continue".

Provide basic supplier information

How to update your Bank data

How to update your Bank data:

1. Provide all necessary information.

2. Click "Save".

Provide basic supplier information

How to update your Bank data

How to update your Bank data:

1. After providing all your bank data, activate the bank account to share it with CVS. You will see the status change from Inactive to Locked.

2. Click "Continue".

Notes:
Activation, deletion and changes have to be approved by CVS.

Provide basic supplier information

How to create new contacts

Supplier View

How to create other contact persons:

In various processes, messages and information will be shared with you by CVS. To be able to reach out to the responsible contact person, please keep your contacts maintained at all time.

1. Click "Add new Contact.

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Provide basic supplier information

How to create new contacts

Supplier View

How to create other contact persons:

1. Provide all requested information to create a new contact person.

2. Give portal access to the new contact, if the person should be able to log in to the portal.

3. Click "Save".

4. The new contact will be in informed by an email, containing login name and initial password.

Provide basic supplier information

How to assign Contacts to Roles

Supplier View

How to assign Contacts to Roles:

1. Click the pen icon to the role, you want to assign a new person to.

2. Click "Add Another Responsibility" to have more than one person in that role.

3. Choose the appropriate person from your previously added Contacts and if required, also further information like the Company code this contact is responsible for.

4. Click "Save".

Provide basic supplier information

How to update the contact persons and roles

Supplier View

How to update the contact persons and roles after initial registration:

1. As long as you have not registered a second contact person, you can access the Contact People page via the yellow bar on the Dashboard. Click the link here.

2. Alternatively, click "Contact People" via the "Primary data" icon in the navigation bar.

3. You can also click the "Contact People" tile on the dashboard.

4. Now the Contacts page opens, where any supplier contact can add or adapt Contacts and Roles, as described before.

Provide basic supplier information

How to update Categories of deliverable goods

Supplier View

How to update Categories of deliverable goods:

1. Check and correct which goods you seek to be approved for as a supplier.

2. Click the Category cluster to open a dropdown to see the categories beneath it.

3. Check the box to choose a category; either on cluster level or on category level.

4. Delete categories either by unchecking the box or by clicking the trash bin symbol.

5. Choose a Primary Category you deliver to CVS.

6. Then click "Continue".

Small supplier profile

Use Case Overview

Overview

Use Case Description

As an expected Benchmark or Prototype supplier, learn how to maintain the small supplier profile and how to process the ticket.

- General
- Business
- Certifications
- Environment

Notes

- Fill out the supplier profile in English.
- The small profile is to be filled out by suppliers invited as Benchmark or Prototype supplier. Initial Direct/Serial suppliers only submit the big profile.
- The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Small supplier profile

How to fill the General tab

Supplier View

How to fill the General tab:

1. Choose in which region your company is located in, as some questions on the general tab may differ due to the input.

2. Provide the requested information.

3. Click "Save"

4. Move on to the "Business" page.

Small supplier profile

How to fill the Business tab

Supplier View

How to fill the Business tab:

1. Download the NDA.

2. Fill all mandatory and all possible optional fields.

3. Click "Save"

4. Move on to the "Certifications" page.

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Small supplier profile

How to fill the Certifications tab

Supplier View

How to fill the Certifications tab:

1. Answer if you are certified according to the requested standards and provide certification and validity.

2. Click "Save"

3. Move on to the "Environment" page.

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Small supplier profile

How to fill the Environment tab

Supplier View

How to fill the Environment tab:

1. Download the Knorr-Bremse Supplier Code of Conduct.

2. If you agree to it, select "Yes" and upload the signed Knorr-Bremse Supplier Code of Conduct.

3. Then click "Save".

Small supplier profile

How to fill the publish the supplier profile

Supplier View

How to fill the publish the supplier profile:

1. When 100 % of the mandatory fields got filled, the information box turns green. Otherwise, you are informed, on which pages input is still missing.

2. Now, the "Publish" button got activated. Please click it to publish the supplier profile and submit it for revision to CVS.

3. Confirm the publication by clicking "OK".

Big supplier profile

Use Case Overview

Overview

Registration - Profile

Back | Save | Publish

DATA | CONTACTS | CATEGORIES | 4 PROFILE

General | Business | Technical | Certifications | Quality | Environment

⚠ Please make sure you have completed all mandatory fields

If you have technical or portal related questions, please contact our Purchasing Support Office: (purchasing.support@knorr-bremse.com)

Supplier Presentation

Supplier presentation | Datei auswählen | Keine Datei ausgewählt

General Region

What region is your company located in?* | Europe

Region-Specific Questions & Downloads

Standard Terms and Conditions of Purchasing and Ordering (STCPO, Download) | PI TSR-20-10-xx Standard Terms and Conditions of Purchasing and Ordering (STCPO) (Y026286)

Please acknowledge your agreement with Standard Terms and Conditions of Purchasing and Ordering (Download and sign).* | Yes | STCPO_Confirmation | 📎 Screenshot 2025-01-23 095616.jpg

Master Supply Agreement (MSA) (Download only) | Master Supply Agreement (MSA)

General Supplier Logistics Directive (Download only) | Logistics Directive

Use Case Description

As an expected Direct/Serial supplier, learn how to maintain the small supplier profile when registering as a supplier via the JAGGAER Connect supplier portal. Learn how to process this ticket.

- General
- Business
- Technical
- Certifications
- Quality
- Environment

Notes

- Fill out the supplier profile in English.
- The big profile is to be filled out by suppliers invited as Direct/Serial supplier. Initial Benchmark or Prototype suppliers only submit the small profile.
- The Dashboard can vary between users due to its customization characteristics.

Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

If you were initially invited to complete the big profile, please fill in all fields. If you have already published a small profile as a benchmark supplier, the big profile has been pre-filled where possible. Please review, update, and complete the information.

1. Choose your region, as the questions and requested document are region-specific.

2. Fill out all information on the "General" tab.

3. Then move on to the "Business" tab.

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Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Fill out all information on the "Business" tab.

2. Then move on to the "Technical" tab.

Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Fill out all information on the "Technical" tab.

2. Then move on to the "Certifications" tab.

Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Fill out all information on the "Certifications" tab.

2. Then move on to the "Quality" tab.

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Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Fill out all information on the "Quality" tab. Download the Quality Management for Program of Procurement Document, sign, and upload the signed version.

2. Then move on to the "Environment" tab.

Big supplier profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Fill out all information on the "Environment" tab.

2. Download the Supplier Code of Conduct. If you acknowledge it, please sign and upload again.

3. Then click first save. If the yellow box changes to green and the mandatory fields are filled by 100%, click publish to send the big supplier profile to CVS.

Small supplier profile processing

Use Case Overview

Overview

Use Case Description

Learn how to process a small supplier profile, published by a potential supplier.

- Check published profile
- Delegate to CVS college
- Send back to supplier
- Decline supplier
- Accept supplier

Notes

- The Dashboard can vary between users due to its customization characteristics.

KNORR-BREMSE

Small supplier profile processing

Review a sent back profile

Supplier View

How to review a sent back profile:

1. You are informed via email that your profile requires a review. Please read the comment in the email and click the link.

2. Also, on the JAGGAER Connect supplier portal you have a red notice. Click the link to review the profile.

Small supplier profile processing

Review a sent back profile

Supplier View

How to review a sent back profile:

1. Update your information in accordance with the provided comment in the email.

2. Click "Save" and then "Publish", to send the profile back to CVS.

Small supplier profile processing

Decline the supplier

Supplier View

Dear Mr. Andreas Hofer,

thank you for your registration.

Unfortunately, your application for admission to the Supplier Portal has been declined.

Below you can find some additional information:
There are reasons against you.

Questions? We are happy to help!

Reach out to us

Knorr-Bremse Group

IMPRINT   ABOUT US   DATA PRIVACY

①

How to be declined as a supplier:

1. In case your initial profile was declined, you receive an email, providing a comment by CVS.

Your JAGGAER Connect supplier portal access will be terminated.

Small supplier profile processing

Accept the supplier

How to be accepted as a supplier:

1. If your profile was approved, you receive an email and you are accepted as a supplier.

Big supplier profile processing

Use Case Overview

Overview

Use Case Description

Learn how to process the big supplier profile after publishing by the suppler.

- Accept, Decline, Delegate, or Send profile back to the Supplier.

Notes

- The Dashboard can vary between users due to its customization characteristics.

Big supplier profile processing

Accept the supplier
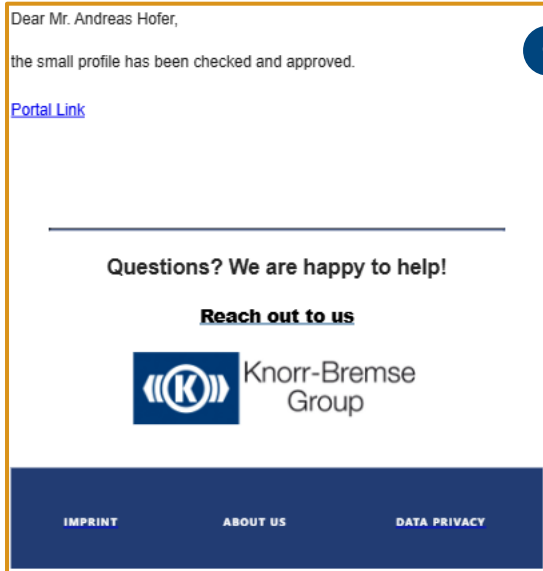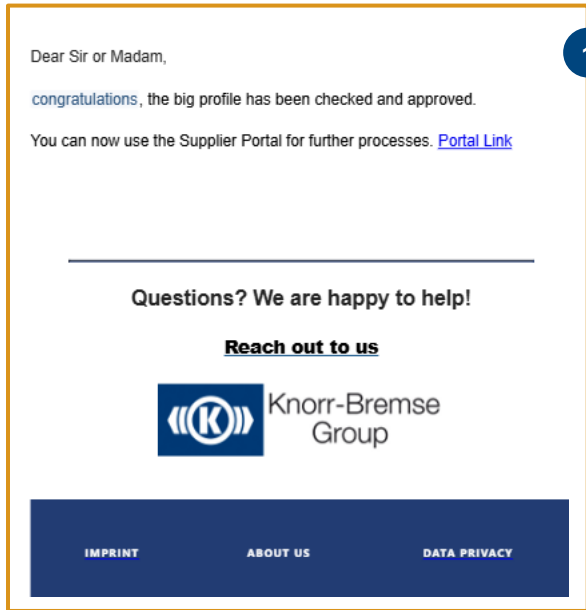
Supplier View

How to be accepted as a Direct/Serial supplier:

1. If your profile was approved, you receive an email and you are accepted as a supplier.

With accepting, the Supplier is notified, and his Supplier Type changes to Direct/Serial.

You will receive the notification email with the header "Approval of the big profile [your company's name]" from no-reply@app11.jaggaer.com.

Benchmark Supplier: Trigger invitation to big profile

How to complete your big profile

Supplier View

How to complete your big profile:

1. Open the JAGGAER Connect supplier portal after receiving the notification email "Invitation to big profile" by no-reply@app11.jaggaer.com.

2. On the supplier portal dashboard, click the link to enter the big profile.

For further processing, please refer to "big supplier profile" and "big supplier profile processing".

Supplier Relation Management - Registration

Supplier 360° Dashboard

Initial Supplier Registration

Navigation supplier portal

Provide basic supplier information

Small supplier profile

Big supplier profile

Small supplier profile processing

Big supplier profile processing

Benchmark Supplier: Trigger invitation to big profile

Supplier Relation Management - Maintenance

Supplier Relation Management - Maintenance

In this chapter we will see…

- Change Master Data
- Change assigned categories
- Adding supplier contact person in supplier portal
- Edit supplier contact person
- Update supplier profile
- Supplier activates Bank Data
- Supplier deactivates Bank Data
- Supplier edits Bank Data

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Change Master Data

Use Case Overview

Overview

Use Case Description

Learn how to change your supplier master data and how to process the change.

■ Change supplier master data
■ Process supplier master data change

Notes

■ The Dashboard can vary between users due to its customization characteristics

Change Master Data

How to Change Master Data

Supplier View

How to change Master Data:

1. Open the supplier portal and click on the "Primary data-icon" in the taskbar located on the left side of the homepage and click "Base Data".

2. Edit your Base Data.

3. Click "Save". After doing so the updated data is reviewed by the CVS Team.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Change Master Data

How to Change Master Data

Supplier View

How to change Master Data:

1. If changes are rejected, you are informed to revise your Base Data. Pay attention to the decline reason, rework your Base Data save as before. The email by no-reply@app11.jaggaer.com has the subject "Revision Master Data Change".

2. If changes are accepted, you will receive an email with subject "Change of master data accepted" by no-reply@app11.jaggaer.com.

■ SRM – Supplier Relationship Management

Change assigned categories

Use Case Overview

Overview

Use Case Description

Learn how to change your category.

■ Change assigned categories
■ Get informed about supplier changing categories

Notes

■ You can adjust categories to inform CVS about their technical capabilities. Which categories are assigned internally at CVS is decision of CVS.
■ The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Change assigned categories

How to Change assigned categories

Supplier View

How to Change assigned categories:

1. Select your categories and change the main selected category if needed. You can adjust categories to inform CVS about their technical capabilities. Which categories are assigned internally at CVS is decision of CVS.

2. Click "Save".

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Adding supplier contact person in supplier portal

Use Case Overview

Overview

Use Case Description

Learn how to add a further contact person to your JAGGAER Connect supplier portal.

- Navigate to the Contact People page
- See description "Provide basic supplier information - How to create new contacts"

Notes

- The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Adding supplier contact person in supplier portal

How to add supplier contact person

Supplier View

How to add supplier contact person:

1. Go to the Contact people page.

Then follow the instruction in "Provide basic supplier information - How to create new contacts"

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Edit supplier contact person

Use Case Overview

Overview

Use Case Description

Edit the data of a contact person.

- Edit contact person data in JAGGAER Connect supplier portal.
- Receive message about change on supplier side.

Notes

- The Dashboard can vary between users due to its customization characteristics.
- It is the supplier's responsibility to keep their contact persons up-to-date.

Edit supplier contact person

How to edit supplier contact person

Supplier View

How to edit supplier contact person:

1. Go to the Contact people page.

2. Click the pen icon to edit the contact.

Edit supplier contact person

How to edit supplier contact person

Supplier View

How to edit supplier contact person:

1. Update the contact person information.

2. Click "Save".

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Update supplier profile

Use Case Overview

Overview

Use Case Description

Learn how to adjust profile data after accepting.

- Update your supplier profile.
- Refer to "Big/Small profile published processing".

Notes

- The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Update supplier profile

How to adjust the supplier profile

Supplier View

How to adjust the supplier profile:

1. Update the contact person information.

2. Click "Save" and "Publish".

3. Then refer to "Big/Small profile published processing".

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile
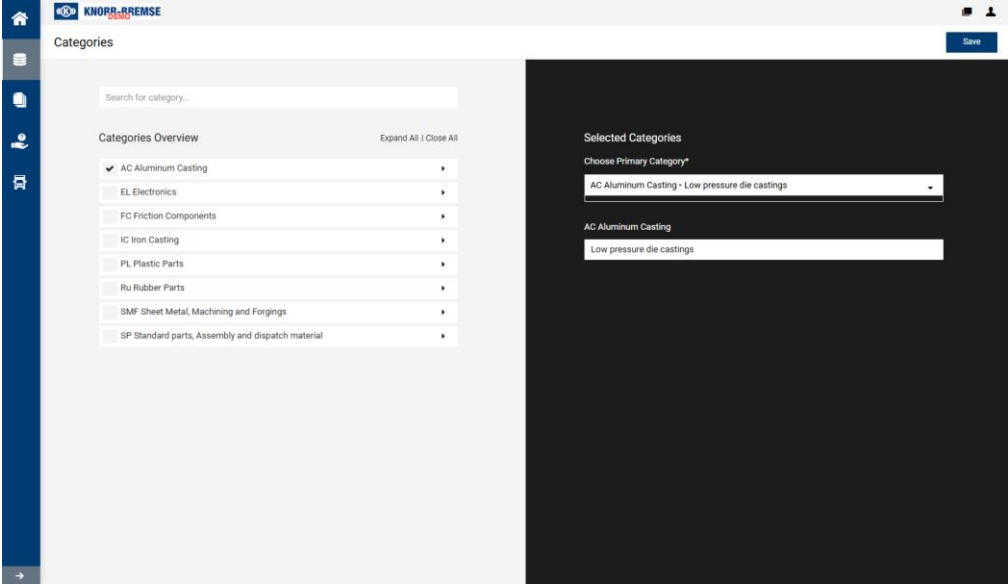
Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier activates Bank Data

Use Case Overview

Overview

Use Case Description

Learn how to add a new bank account and how to process the activation, both for newly registering suppliers and for existing suppliers.

- Add a further Bank account
- Activate Bank account

Notes

- Ticket is triggered after registration, when supplier initially edited and activated bank data.
- Ticket is triggered, when existing supplier activates a new bank account.
- The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal
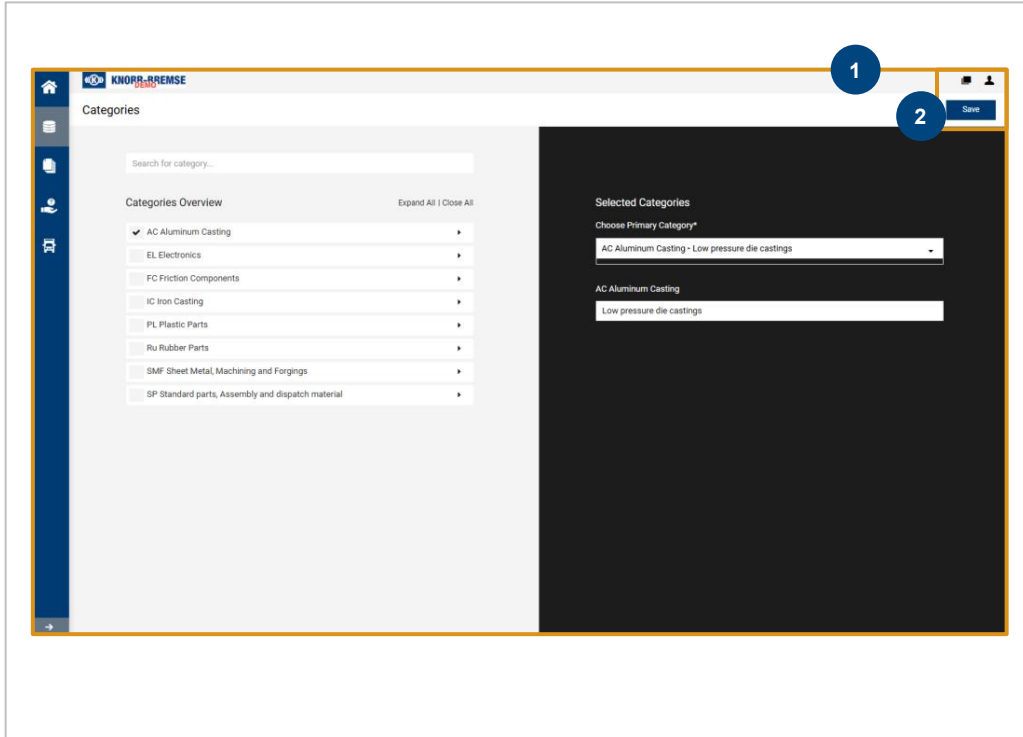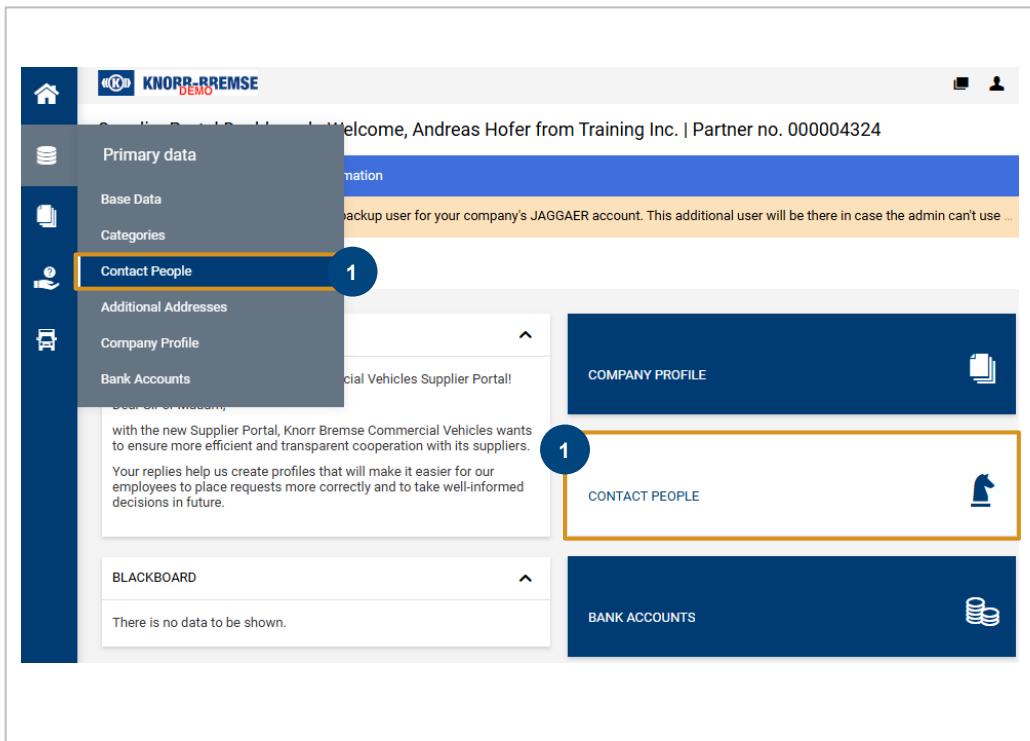
Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier activates Bank Data

How to add a further bank account

Supplier View

How to add a further bank account:

1. Go to the Bank Accounts

2. Click "Add Bank Account" icon.

Supplier activates Bank Data

How to add a further bank account

Supplier View

How to add a further bank account:

1. Provide all necessary information.

2. Click "Save".

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier activates Bank Data

How to update your Bank data

Supplier View

How to update your Bank data:

1. After providing all your bank data, activate the bank account to share it with CVS. You will see the status change from Inactive to Locked.

2. Click "Continue".

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier activates Bank Data

How to activate your bank account
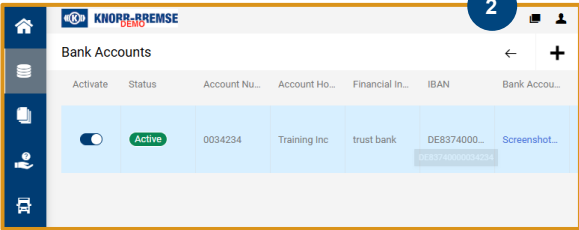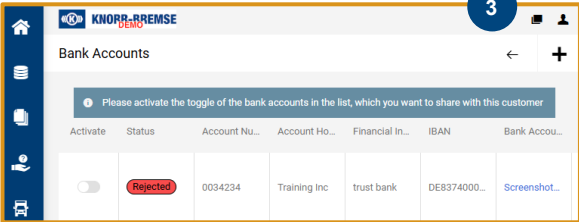
Supplier View

How to process the activation of a bank account:

Click on the "Overview Dashboard" tile

1. You are informed about the check of your bank data via email with subject Approval Bank Data Account – [Vendor number] – [company name]. Please pay attention to comments. Sender is no-reply@app11.jaggaer.com.

2. You see the status to be "Active", if CVS approved the bank data change.

3. You see the status to be "Rejected", if CVS declined the bank data change. Please check the comment in the email and review your bank data. Then activate the corrected bank data.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier deactivates Bank Data

Use Case Overview

Overview

Use Case Description

Supplier deactivates or deletes a bank account. CVS processes the deactivation

■ Delete existing Bank account
■ Deactivate existing Bank account
■ Process deactivation

Notes

■ The Dashboard can vary between users due to its customization characteristics.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal
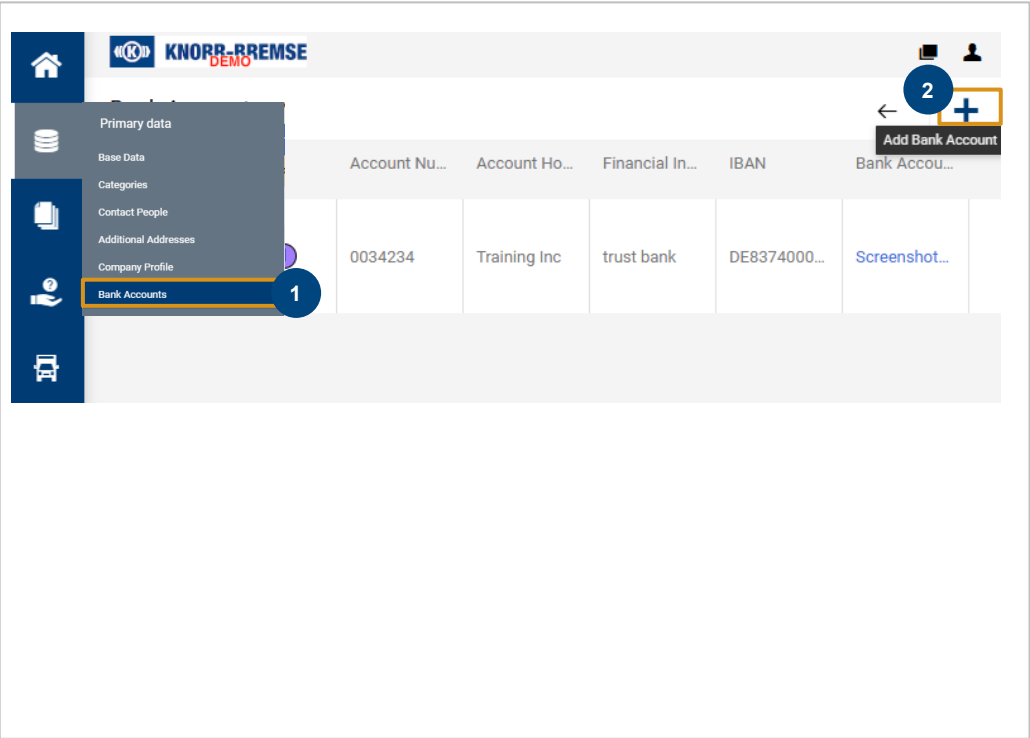
Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier deactivates Bank Data

How to deactivate your bank account

Supplier View

How to deactivate or delete your bank account:

Navigate to Bank data.

Delete Bank data

1. Hover over the bank account and click the delete icon to remove the bank account.

2. Click „Delete" in the pop-up window.

Deactivate Bank data

3. Click the Activate-switch set an account to inactive.

4. Click „Deactivate" in the pop-up window.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

Supplier deactivates Bank Data

How to deactivate your bank account

How to deactivate your bank account:

Click on the "Overview Dashboard" tile

1. The supplier is asked to enter the JAGGAER Connect supplier portal to see the result of his bank data deactivation ticket in an email by no-reply@app11.jaggaer.com with subject "Bank Data Account Deactivation-[vendor number] –[company name]".

2. When CVS declined the deactivation, the status of the bank account switched back to "Active".

3. When CVS accepted the deactivation, the status of this bank account has changed to "Inactive". In case you deleted, the bank account is not visible anymore.

Supplier View

Supplier edits Bank Data

Use Case Overview

Overview

Use Case Description

Supplier edits his bank account data. CVS processes the change.

■ Edit the Account holder
■ Start the processing

Notes

■ The Dashboard can vary between users due to its customization characteristics.

Supplier edits Bank Data

How to edit your bank account information

Supplier View

How to edit your bank account information:

1. Click the "Edit" icon.

2. You can only edit the Account Holder.

3. Click "Save.

4. Account is locked and waiting for processing by CVS.

Supplier Relation Management - Registration

Supplier Relation Management - Maintenance

Change Master Data

Change assigned categories

Adding supplier contact person in supplier portal

Edit supplier contact person

Update supplier profile

Supplier activates Bank Data

Supplier deactivates Bank Data

Supplier edits Bank Data

In the chapter, we will see…

- Support Process Overview
- Support for End Users

Support

Procurement   Supply Chain   Supplier Development

JAGGAER Connect Support Process Levels

JAGGAER Support
- Software Troubleshooting, Bug Fixiing & System Updates
- Specialised Support

Core Team
- System configuration and standards
- Escalation Management

Regional KeyUser
- EndUser Support
- Multi-site Process Knowledge
- Escalation to Core Team

Local KeyUser
- EndUser Support
- Local Process Knowledge

Core Team

Regional Key User

Local Key User (LPPM / MM Key User)

Procurement End User

Supply Chain End User

Supplier Development End User

Procurement   Supply Chain   Supplier Development

JC Support Process Overview

Click **here** for **FAQ's.**

Click **here** for **General Support Info**.

I have an issue regarding JC that I cannot solve…

I have an issue regarding JC that I cannot solve…

I have an issue regarding JC that I cannot solve…

| End User **Procurement** | End User **Supply Chain** | End User **Supplier Development** |

Contact your dedicated **Regional Key User** via email, phone or Teams.

Your Regional Key User provides a **solution** for your issue.

Contact your dedicated **Local Key User** via email, phone or Teams.

Your Regional Key User provides a **solution** for your issue.

Contact your dedicated **Regional Key User** via email, phone or Teams.

Your Regional Key User provides a **solution** for your issue.

| First Level Support: **Regional Key User** | First Level Support: **Local Key User** | First Level Support: **Regional Key User** |

Click here to find your Regional Key User.

Click here to find your Local Key User.