Primary Data

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Agenda

- 1. Base Data
- 2. <u>Categories</u>
- 3. <u>Contact People</u>
- 4. <u>Company Profile</u>
- 5. Bank Accounts



Base Data

- 1. Navigation
- 2. <u>Company Data</u>



Navigation

 To edit your company data, navigate to Primary Data -> Base Data.





Base Data

Company Data

 In Base Data, you can edit or add basic information about your company, such as the company name and address.





Base Data Company Data

 You can also edit your main contact, VTA code, and tax number.





Base Data

Company Data

- You can also tick or untick your visibility in Jaggaer for other customers using Jaggaer.
- When all changes are done, click on the Save button.



Categories

- 1. Navigation
- 2. <u>Select Categories</u>
- 3. <u>Primary Category</u>



Categories

Navigation

 To edit the categories of the goods delivered, navigate to Primary Data
 -> Categories.





Categories Select Categories

- Use the search bar or expandable menu to find the categories of goods you can deliver.
- Confirm the selected categories by ticking the box on the left side.





Categories Primary Category

- On the left side of the screen, you can see an overview of all selected categories.
- It's mandatory to select one Primary Category.
- When all changes are done, confirm them by clicking the Save button.





- 1. Navigation
- 2. Add New Contact
- 3. Edit / Delete Contact
- 4. <u>Roles</u>



Navigation

 To edit the contact people of your organization, navigate to Primary Data -> Contact People.





Overview & Add New Contact

- In the Contacts tab, you can see an overview of contacts registered for your organization.
- To add a new contact, click the 'Add New Contact' button.

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Contact People Add New Contact

 While adding a new contact, select the salutation and fill in the first name and last name.

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- The only mandatory contact information is the email address, but you can also fill in the phone number.
- If the user should have Portal Access, select this option. Select also the permissions to be granted to the contact. At least one is mandatory. The invitation email will be sent to them automatically.

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	E-Mail	E-Mail* tirady-nastrojar-29@icloud.com	
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Invitation email

- The new contact will then receive an invitation email, including a link to change the password.
- Please note that the contact has 72 hours to change the password.

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Your existing JAGGAER supplier acco As part of this upgrade, you need to pr	unt has been automatically upgraded to provide you and your customers with more protection.
As part of this upgrade, you need to p	
	rovide a new password for your supplier account. Please follow this link to change your password within the next 72 hours:
Change supplier account password.	
JAGGAER is a leading provider of digi	tal procurement software and solutions, and the procurement platform of choice for your customer(s). To learn more, visit https://www.jaggaer.com/.
If you are having issues with your JAG	GAER account, please contact JAGGAER Global Customer Care via the following web form: https://www.jaggaer.com/submit-supplier-support-request



Contact People Edit / Delete Contact

 To edit or delete the contact, hover your mouse over its line and the appropriate icon will appear on the right side.





Edit Contact

- After clicking the pen icon, an edit mode that looks the same as when creating a new contact will appear.
- After filling in all changes, click the Save button, and the contact will be updated.





Delete Contact

- After clicking the bin icon, a pop-up window will appear.
- If you are sure you want to delete the contact, click the 'Yes' button.





Roles

The other tab in the Contact People section is 'Roles'

- Roles define a contact's responsibilities and may affect which actions within the Supplier Portal are available to the contact.
- To edit contacts, click on one of the pen icons.

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Edit Roles

- In the pop-up window, you can assign different company roles to different contacts.
- Some roles can be managed by only one contact, while others can be managed by multiple contacts.





Edit Roles

- Some responsibilities, like 'Orders', can be assigned to a contact based on the customer's Company Code and Purchase Organization.
- Confirm the changes by clicking the Save button.





Company Profile





TBD



- 1. Navigation
- 2. Activate account
- 3. Deactivate account
- 4. Add Bank Account



Navigation

 To edit your Bank Accounts, navigate to Primary Data -> Bank Accounts.

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Bank Accounts Overview

- In Bank Accounts, you can see an overview of your company bank accounts, including their status.
- To edit or delete the account, or to see its details, hover your mouse over the line of the bank account and dedicated icons will appear..

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Activate Account

- If you would like to activate an inactive account, click on the Activate button.
- After clicking Activate, the status changes to Locked, and activation needs to be confirmed by the customer.
- Also, the icons on the right side change, and you can only view account details.





Deactivate Account

- When the customer confirms the change, the status is changed to Active.
- To deactivate an active account, untick the Activate button.





Deactivate Account

- Confirm deactivation by clicking the Deactivate button.
- The status will be changed to Locked, and the deactivation needs to be confirmed by the customer.





New Account

- After confirmation, the status is changed to Inactive.
- To add a new bank account, click on the plus icon in the upper right corner.

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New Account

- After confirmation, the status is changed to Inactive.
- To add a new bank account, click on the plus icon in the upper right corner.

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New Account

 Populate all mandatory data and continue by scrolling down to other fields.





New Account

- Fill in the rest of the data, select the currency of the account, and upload the bank account files.
- When everything is ready, click the 'Save' button to add your account.

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New Account

 The account has been added to your overview.
 To use it, follow the activation procedure.

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