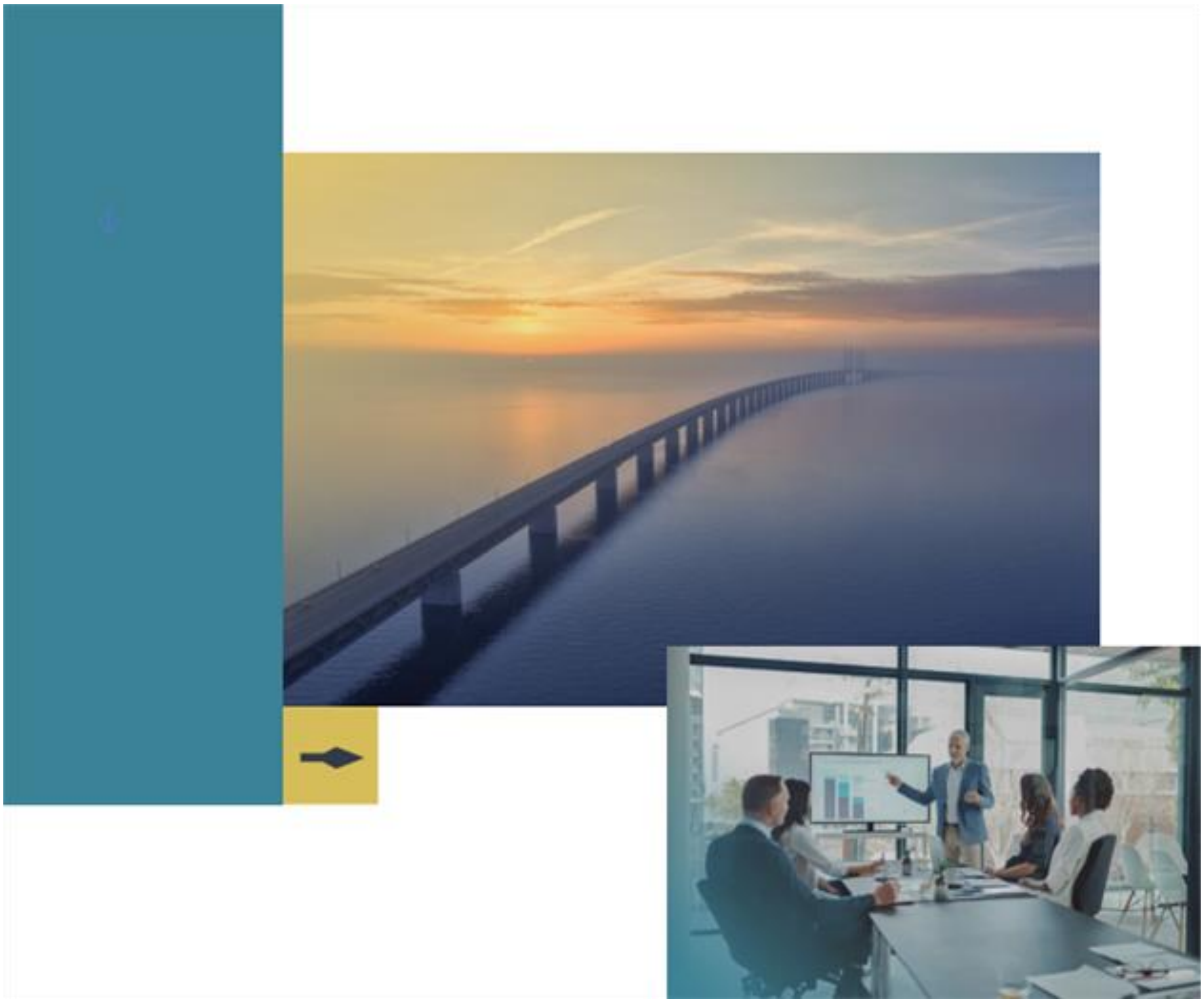

Advanced Sourcing Optimizer

Supplier Quick Start Guide

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Supplier Quick Start Guide

Supplier Home Page

The Supplier Home Page shows you all the bidding steps in one event. If you participate in multiple events, your Home Page may look different from one event to another, and is dependent upon how the buyer sets up each event.

Note: Depending on buyer configuration, some events may require bidders to complete certain requirements for their proposals to be considered complete. Bids in incomplete offers may be removed from consideration. Bidders may also see additional messaging on the home page and other pages, and be required to indicate that they are submitting the bid round's final proposal by clicking the **Submit Completed Proposal** button on the home page.

Each section on the home page has 4 columns:

- **Tasks** - This shows what the task is.
- **Actions** - This show what action you need to take.
- **Review/Complete** - This section tells you what needs to be done and if you have completed the task.
- **Details** - This section gives you information on what you have done so far.

Information/Alerts

Info/Alerts	Actions	Reviewed?	Details
Welcome Message	View Message	No (Required)	Read the welcome message
Notifications	No Notifications 0	No Notifications	
Questions & Answers	No Q&A 0	No Q&A	

Pre-Bid Tasks

Pre-Bid Tasks	Actions	Complete?	Details
Statement Gating	Complete Gating	No (Required)	Complete statement gating.
Document Gating	Complete Gating	No (Required)	Complete document gating.
RFI	Complete RFI	No (Optional)	Complete the RFI
Reference Documents	View Reference Documents	Yes	

Information/Alerts

- **View Welcome Message** - Click on **View Message** under Actions to see the Welcome message.
- **Notifications** - If there are notifications, you will be able to view them by clicking on **View Notifications** under actions.
- **Questions and Answers** - Click on **View Q&A** under **Actions** to view Questions & Answers.

Note: Check this section for any new messages, notifications or questions and answers that may be posted or updated. The Reviewed status may have changed from green to red again if new information is available since you last accessed.

Pre-Bid Tasks

1. **Intent to Bid** - Click on **Complete Intent to Bid** under **Actions**.
   Respond with **yes** if you intend to bid and **no** if you do not intend to bid.
2. **Statement Gating** - Click on **Complete Gating** under **Actions** and Agree to any Statement Gating.

3. **Document Gating** - Click on **Complete Gating** under **Actions** and download any required Gating Documents

4. **Event Document Gating** - Click **Complete Gating** under **Actions** and download any required Event Gating Documents. You may also be required to upload required event documents. The approval status of any uploaded documents will be displayed in the "Complete?" field.

5. **Reference Document** - Click on **View Reference Documents** under **Actions**. Download any Reference Documents posted by the buyer. Reference Documents are for information only during a sourcing event. Examples include: Welcome letter and Terms, & Conditions.
   Note: Documents that are accessed in the Document Gating step will also be listed in this section. The details will display how many documents in addition to the Gating documents you have not yet reviewed.

6. **RFI** - Click on **Complete RFI**. Answer questions within the RFI. Make sure you answer any required question (those marked with asterisks). If the question requires a file upload answer you will need to upload the document under the bid documents section, and then, once you have that document uploaded, come back to the RFI and choose the document name in the drop down box. The file must be loaded into the bid documents section in order for the file name to be included in the drop down box for the RFI file upload answers. Click **Submit**. Confirm your submission. Make sure that you confirm your RFI or it will not show as complete. Note the RFI is not used in every sourcing event.

7. **Bid Documents** - Click on **Complete Bid Documents**.
   Upload bid documents here for RFI questions that require a file upload.

Bidding Tasks - Bidding for this event is closed

Bidding Tasks	Actions	Complete?	Details
Line-Item Bids	Bidding Closed	No (Required)	Complete gating.
Conditional Offers	Bidding Closed	No (Optional)	
Capacity	Bidding Closed	No (Required)	

Receipts

Receipts	Actions	Complete?	Details
Bid Status Receipt	No Bids Entered	No Receipt to Download	
Bid Receipt	No Bids Entered	No Receipt to Download	
Conditional Offers Receipt	No Offers Created	No Receipt to Download	
Capacity Receipt	Capacity Not Complete	No Receipt to Download	
RFI Receipt	View | Download	No (Required)	Download this receipt.

Supplier Support

Help	Actions
Business-Related Questions	Submit Q&A
Technical Questions	Support

Bidding Tasks

1. **Line item Bids** - Click **Complete Bidding**. You can enter bids online or offline (via download/upload with excel)

   To Bid Online: Enter your bids Online for each item you want to bid on. Make sure you complete all fields marked with an asterisk. These are required fields. Click **Update Bids** before advancing to another page to save your entries

   To Bid Offline: Download the Bid Sheet in Excel. Complete Bid sheet, save, and upload often. Any upload errors can be fixed within the Errors only sheet (displayed only if upload errors exist) and uploaded

   Note: If you are not bidding on all items in the sourcing event, the Complete status for this line item will always read “Partially”. This is ok if you are not planning to bid on all items in the event.

2. **Capacity** - click on Complete Capacity under actions.
    a. If Capacity menu exists, enter your higher level capacity adjacent to the total of what you bid at the item level
    b. Click **Submit** to save your work
       This additional Capacity collection prevents you from being awarded more business than you can commit to the buyer. Item level capacity (if required) is separate from capacity provided through the capacity menu.
3. **Packages** - click on Complete Packages
    a. Click on **Create Package**.
    b. Type in a package name, and click **Ok**.
    c. Package Comments are optional and used to help identify contents of the Package.
    d. Check boxes adjacent to items you wish to include in your package and click **Add Selected Items to package**.
    e. Always click the **Add Selected Items to Package** button before advancing to another page.
    f. Price each item within your package.
    g. The prices submitted are only valid if the entire package is awarded to you.
    h. Prices can also be imported from your item-level bids by clicking on **Import Pricing**. This allows for a general discount off of your bids to be applied to all items within your package.
       Building Package offers is an optional step. Some events require that a bid must be placed on every item included in a package.
4. **Conditional Offers** - Click on **Complete Conditional Offers**. Building Conditional Offers is an optional step.
    a. Click **Create Conditional Offer**.
    b. Enter a name for your Conditional Offer and click **Next step**.
    c. Select all items or specific items you must win for your discount to trigger. Click **Next step**.
    d. Select **Same as Items in Trigger**, **All Items**, or choose specific items that you will discount if your offer criteria are met. Click **Next step**.
    e. Enter the amount of business you must win for the offer to trigger and also how much you will discount them. Click **Save**. Tiered offers can be entered by clicking on the **+** symbol.

5. **Event Documents** - Click on **Complete Event Documents**.
   If a buyer wants you to upload documents into the event, this will take you to the event documents where there will be a placeholder for you to upload the documents into the event. If you have multiple documents and there is only one placeholder, you can zip all the files into a zip file and upload that file into the event.

Receipts

1. **Bid Status Receipt** - View bid status under actions
2. **Bid Receipt** - View bid receipt under actions.
   Note: The bid receipt you see will be the standard view and may not reflect all fields you completed when placing your bid. If you click on view you can also see the detailed view which will show you all fields.
   a. View, download, and save all of your Receipts for your records.
   b. Data within your Receipt is exactly what JAGGAER has received from your company.
3. **Conditional Offers Receipt** - View conditional offer receipt under actions.

Supplier Support

1. **Getting Started** - Click **Watch Video** under actions.
2. **Business Related Questions** - Click **Submit Q&A** under **Actions**.
   Post your questions on this event for the buyer to answer here. When the buyer answers your question you will receive a notification telling you that the question has been answered. You will be able to view the answer under the Q&A section.
3. **Technical Questions** - Click **Support** under **Actions** to enter a support ticket.
   Enter your technical support questions on the event here for JAGGAER Support to answer.