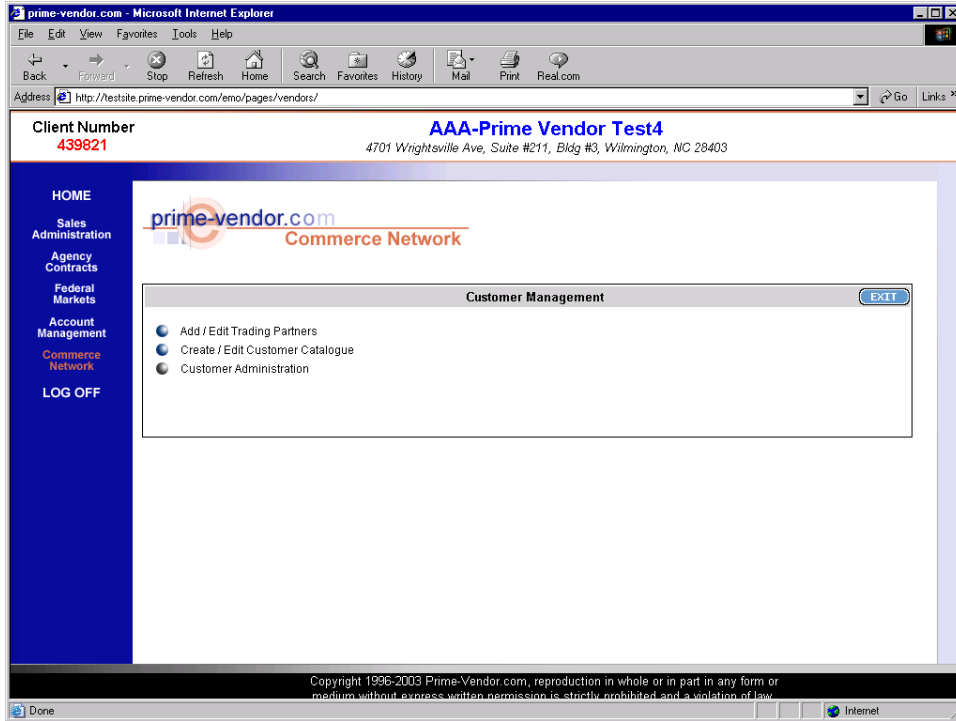


Using the Commerce Network

Part Four: Customer Management

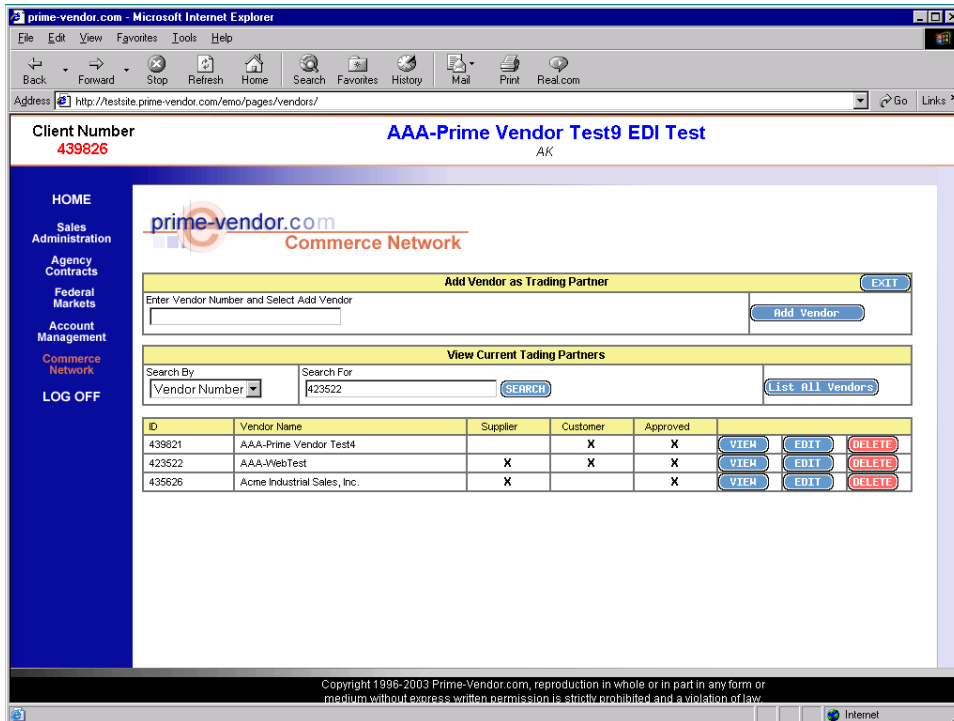
Customer Management consists of three parts:

- 1) Add / Edit Trading Partners
- 2) Accepting a Trading Partner Invitation
- 3) Create Edit Customer Catalogue



Customer Management

Customer Management allows vendors to add or edit trading partners by selecting the first option **Add / Edit Trading Partners**.



Add / Edit Trading Partners Interface

The Add / Edit Trading Partners page displays a searchable listing of current trading partners. Each listing provides the Trading Partner's name, Prime Vendor ID number and their trading Partner status. View contact, shipping, and invoicing information by selecting the **View** button. Select edit to change or update a trading partner's information. Trading Partners can be removed from the listing by selecting the **Delete** button.

To add a new trading partner to the listing enter the Prime Vendor ID number of the vendor you wish to add to your commerce network in to the field labeled "Enter Vendor Number and Select Add Vendor". Select the blue **Add Vendor** button on the right.

The screenshot shows the "Vendor Contact Information" form. It is divided into two main sections: "Vendor Information" and "Vendor Contact Information".

Vendor Information:

- Vendor No: 439823
- Vendor Name: AAA-Prime Vendor Test Vendor
- Address: 456 Skip Ln, Wilmington, NC 28403
- Phone: AAA-Prime Vendor Test6
- Fax: N/A
- Tax ID: PV6TAXID
- Duns Number: PVDUNS002
- Cage Code: 1W0Z4

Vendor Contact Information:

- Trading Partner Status: Supplier | Customer
- Customer Number: [Text Field]
- Contact Name: [Text Field]
- Branch ID: [Text Field]
- Contact Address: [Text Field]
- City: [Text Field]
- State / Zip Code: [Text Field] zip [Text Field]
- Phone Number: [Text Field] ext [Text Field]
- Fax Number: [Text Field]
- Email: [Text Field]

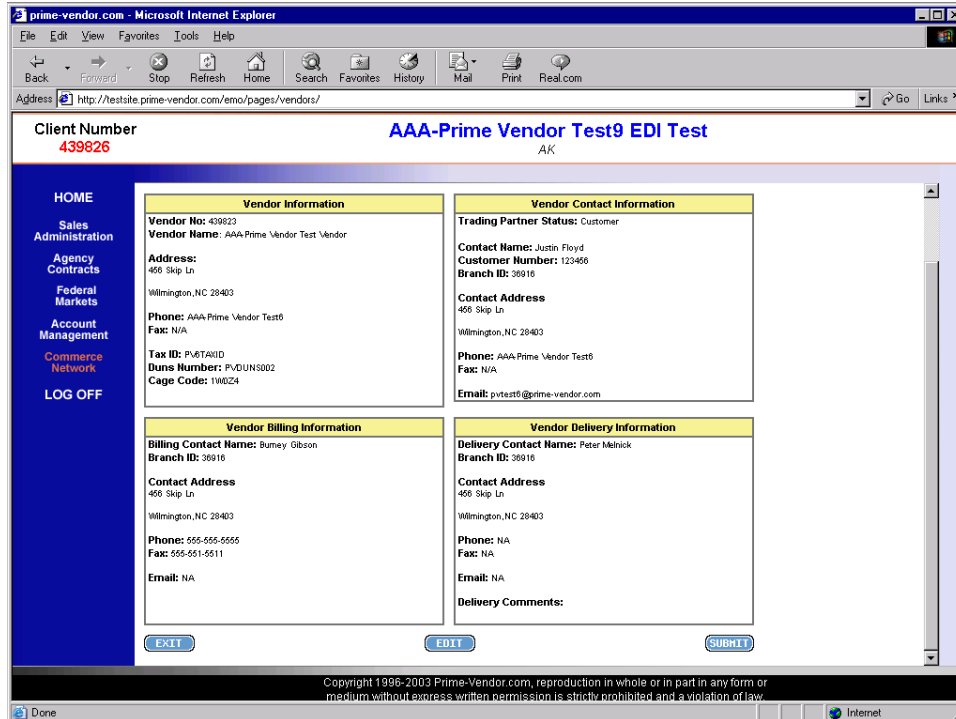
Navigation buttons: EXIT, NEXT, REVIEW.

Instruction: **Complete Vendor Contact Information. Then, proceed to Billing and Delivery information.**

Trading Partner Information

After selecting Add Vendor enter the new Trading Partners Contact, Billing and Delivery information. Switch between the contact, billing and delivery forms by selecting the corresponding button on the left of the interface. Select the **Review** button when the forms are complete.

Note: To continue adding a vendor as a trading partner, the trading partner status of supplier or customer must be selected.



Add Trading Partner review page

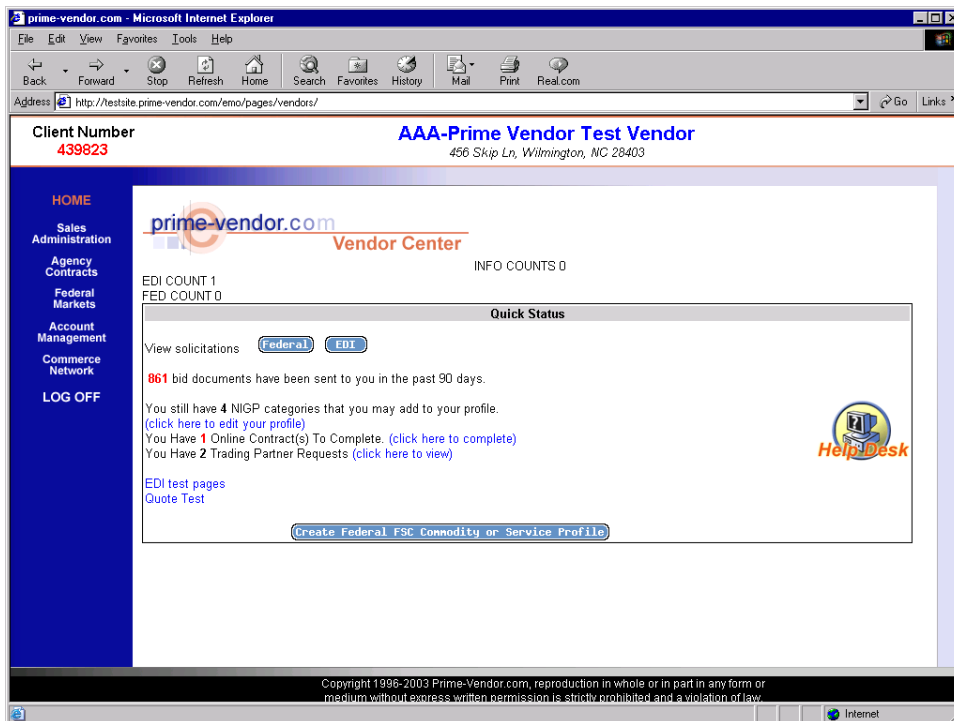
Select the **Submit** button to send the completed Trading Partner invitation to the vendor. Once submitted the system will return to the Add / Edit Trading Partner Interface. The listing will show the new Trading Partner with an empty "Approved" column. The trading relationship will remain unapproved until the new Trading Partner accepts the invitation and updates their Prime Vendor system.

ID	Vendor Name	Supplier	Customer	Approved			
439823	AAA-Prime Vendor Test Vendor		X		VIEW	EDIT	DELETE
439821	AAA-Prime Vendor Test4		X	X	VIEW	EDIT	DELETE
423522	AAA-WebTest	X	X	X	VIEW	EDIT	DELETE
435626	Acme Industrial Sales, Inc.	X		X	VIEW	EDIT	DELETE

The new Partner is added but unapproved.

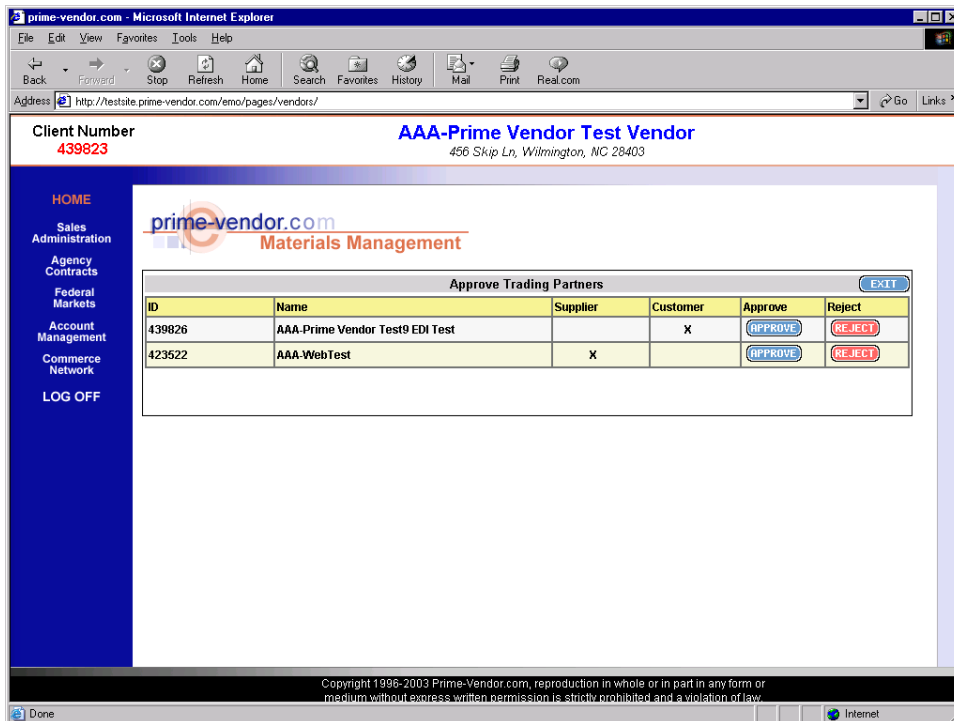
Accepting an invitation to become a trading partner.

A message informing the vendor of a new invitation to become a Trading Partner will appear on the quick-status screen of the vendor's home page.



New Trading Partner Invitation on the Quick Status screen

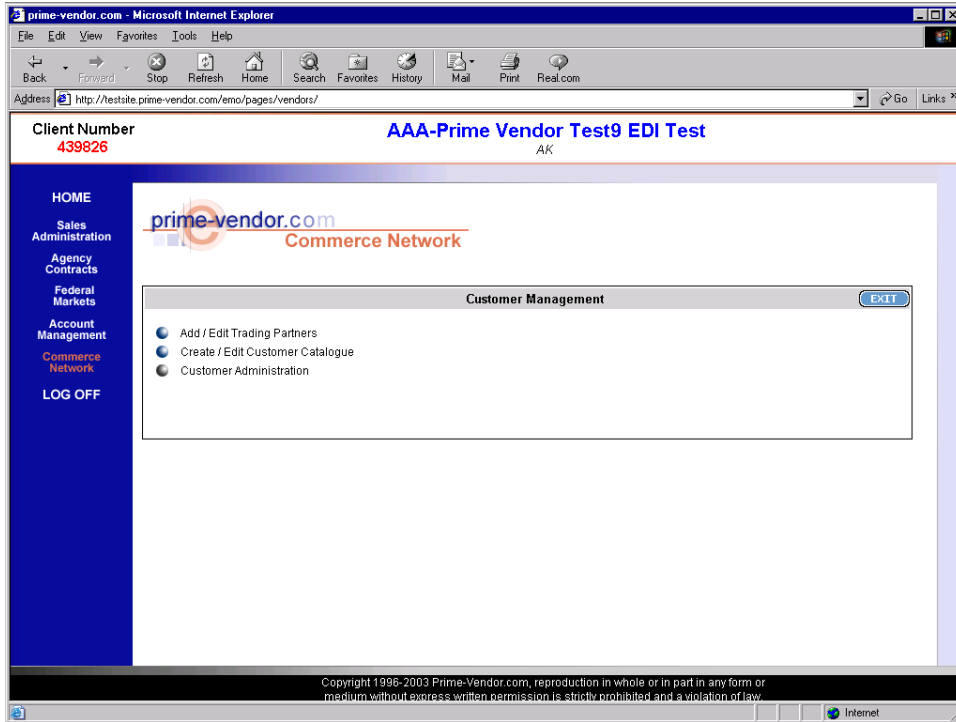
Select the link provided to access the Trading Partner Invitation Approval screen



Trading Partner Approval screen

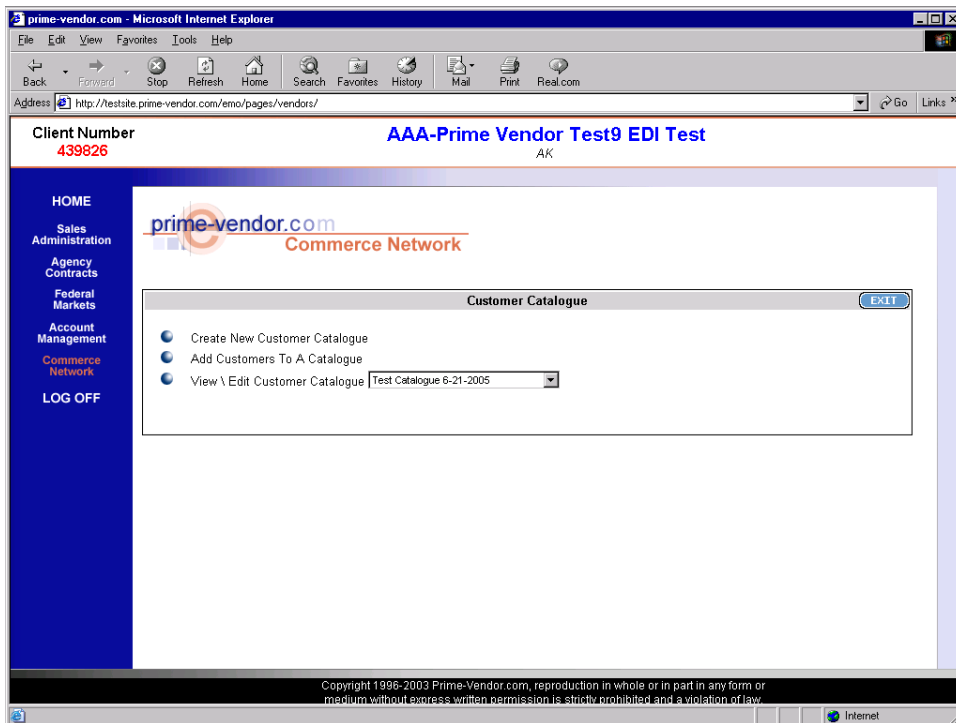
Select **Approve** or **Reject** to respond to the invitation. Approval will automatically establish a trading relationship with the vendor who sent the invitation.

Create Edit Customer Catalogue is where a vendor can create catalogues for their customer trading partners to purchase items from. The catalogues are created from the vendor's Prime Vendor General Catalogue. Similar to a Contracts Catalogue that is established between a vendor and an agency, the Customer Catalogue of the Commerce Network allows vendors to create custom prices for specific products. This provides control of the products and prices each customer trade partner is allowed to access.



The Customer Management Menu

Select **Create / Edit Customer Catalogue**. The next screen will display the options available to create and edit catalogues and provide catalogue access to customer trading partners.



Customer Catalogue Menu

Create New Customer Catalogue will create a new catalogue and provide a form to add products to the catalogue. The products must first be included in the general catalogue before they can be added to a commerce network catalogue.

Add Customers to a Catalogue grants access to catalogues by assigning customers to specific catalogues. In this manner a supplier can control which product sets a customer can view and purchase from.