



SRM Profile Changes

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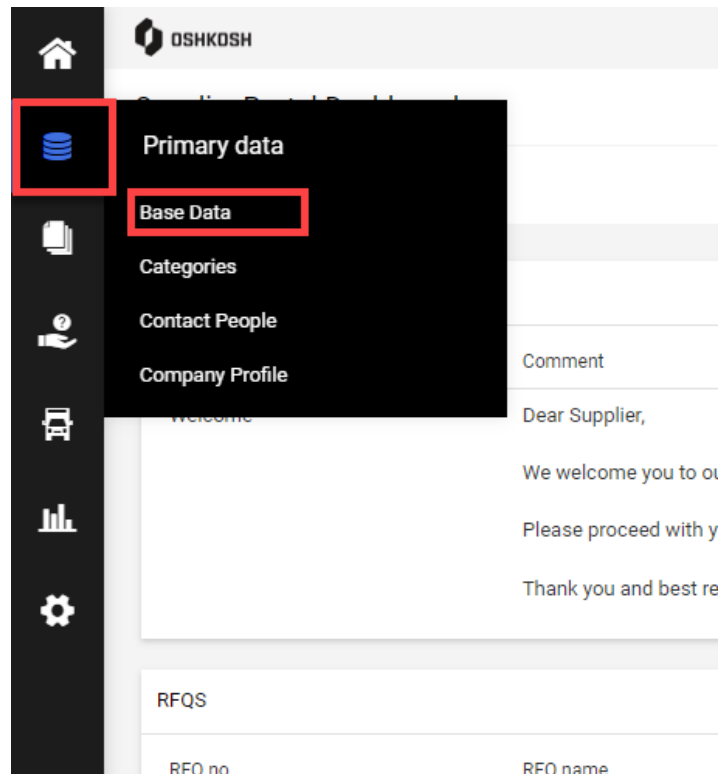
The JAGGAER Supplier Relationship Management (SRM) module supports easy onboarding of suppliers in the Supplier Portal through supplier completed questionnaires. JAGGAER offers suppliers the opportunity to easily maintain their own information in one online location.

This job aid covers the following scenarios:

Page #	Scenario
1	Change Base Data
3	Change Category Selections
4	Add or Change Contacts & Roles
7	Change Company Profile

Continue here if you have been onboarded for RFQ or PO and need to make changes to your Base Data.

1. Click on **Primary Data**, then select **Base Data**.





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2. Make changes as needed.
3. Click **Save**.
4. Oshkosh will review your base data changes. If corrections are needed, an email will be sent to you.

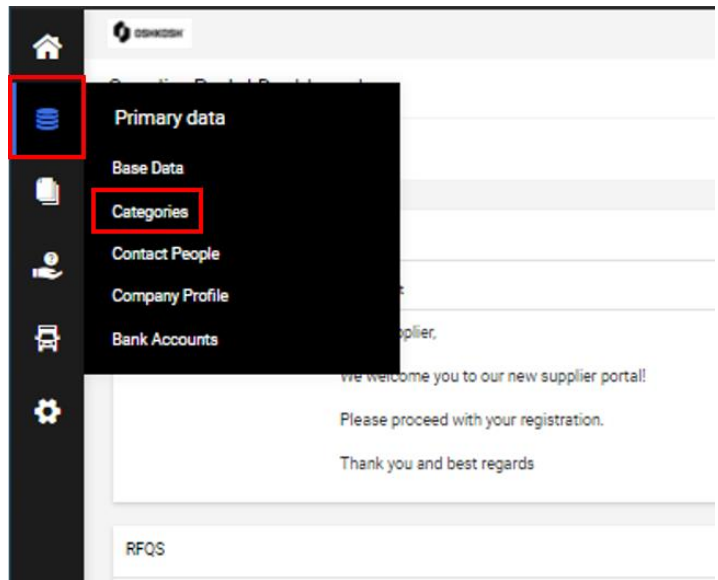
The screenshot shows the 'Base Data' form in the SRM system. The 'COMPANY DATA' section is expanded, and several fields are highlighted with red boxes: 'Company name' (containing 'Oshkosh Supplier'), 'Street' (containing '123 Business Street'), 'City' (containing 'Anytown'), and 'Zip code' (containing '00000'). Other visible fields include 'Company name 2', 'Street 2', 'Suite 3', 'Country' (United States of America), 'State / Province' (Texas), 'Telephone' (1-888-555-1234), 'Homepage' (www.oshkoshsupplier.com), and 'Currency' (US dollar). A 'Save' button is visible in the top right corner. At the bottom, there is a checkbox for agreeing to terms and conditions.



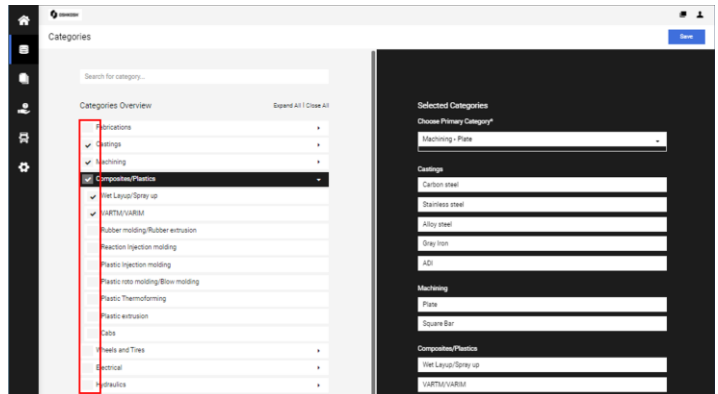
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Continue here if you have been onboarded for RFQ or PO and need to make changes to your Categories.

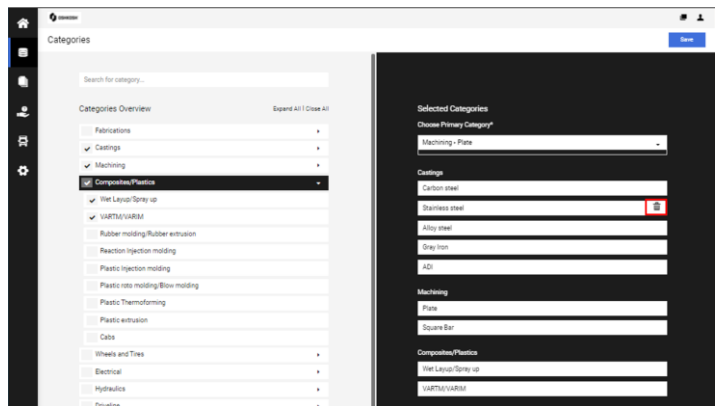
5. Click on **Primary Data**, then select **Categories**.



6. To add categories, **check** additional boxes in the Categories Overview. Use the arrow on the right of the category to view the sub-categories.



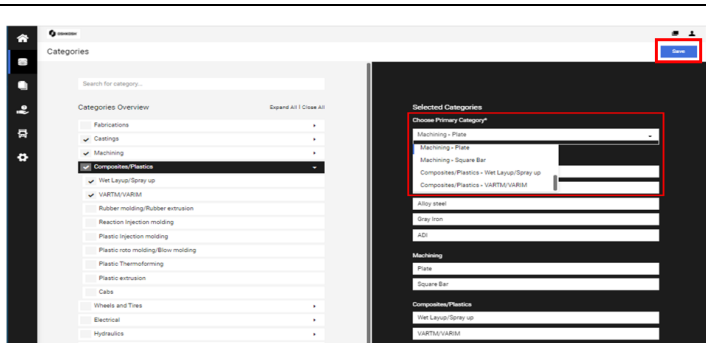
7. To deselect categories, hover over a Selected Category and click the  icon or **uncheck** boxes.





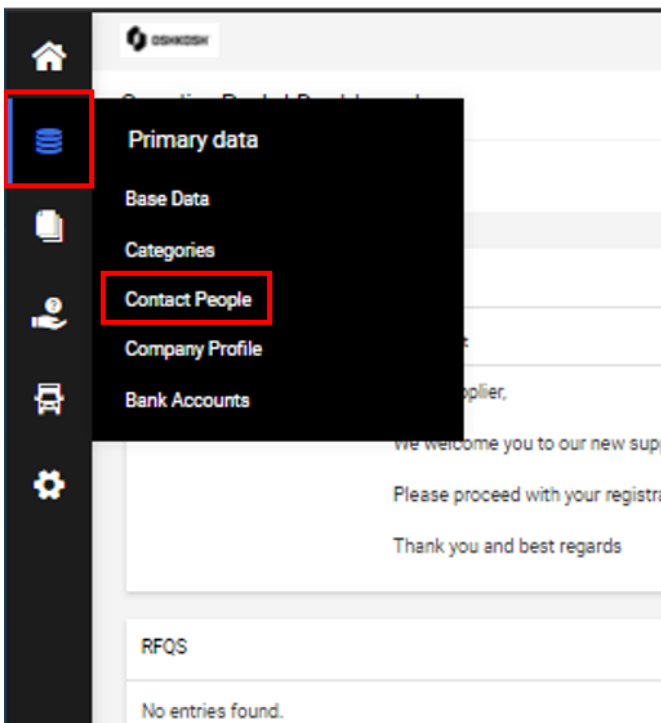
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8. To select a new primary category, click on **Choose Primary Category**, then click on the appropriate category.
9. Click **Save**.

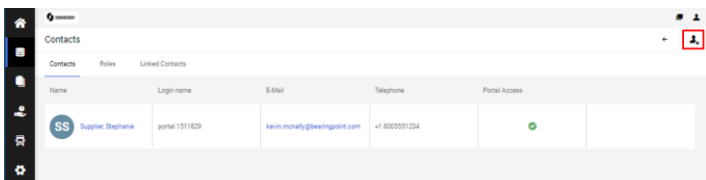


Continue here if you have been onboarded for RFQ or PO and need to make changes to your Contact Role assignments or add an additional user.

10. Click on **Primary Data**, then select **Contact People**.



11. To add a new user, click on the  icon.





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12. Fill out all the following mandatory fields:


- First name
- Last name
- Telephone
- E-Mail
- Portal Access (Toggle switch to blue)
- Login name – Oshkosh recommends entering the first part of the contact's email. (joe.smith@example.com = joe.smith). The new user will receive an email with their login name and a link to set a new password.
- Permissions box (Needs to be checked to provide portal access)

13. Click **Save**.

14. Inform the new user that they will receive an email from Jaggaer with login instructions.

15. To change role assignments, click on **Roles** at the top.

Name	Login name	E-Mail	Telephone	Portal Access
DH Hannes David		knowely@gmail.com	+1800 5555555555	●
SS Supplier, Stephanie	portal.1311829	lewin.monaly@beeingoint.com	+1 8005551234	●

16. Click on the  icon next to the role you would like to alter.

Note: Effects of certain roles listed below:

- Sourcing – Preferred contact(s) for receiving RFQs
- Profile – Receive notifications related to supplier profile
- Order Confirmation – Contact will be assigned to orders as responsible and will receive order notifications
- Company President – No effect
- Payment – No effect
- Defense Sourcing Contact – RFQs from Oshkosh Defense will be sent to this contact by default



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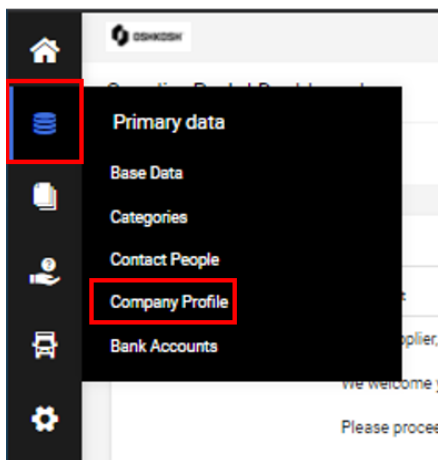
<p>17. To change the user assigned to a role, enter the name of the user in the Name field.</p> <p>18. Click Save.</p>	
<p>19. To assign the role to an additional user, click + Add Another Responsibility</p> <p><i>Note: Not all roles can be assigned to multiple users.</i></p> <p>20. Start typing in the Name* field to search for a user, then click to select.</p> <p>21. Click Save.</p>	



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Continue here if you have been onboarded for RFQ or PO and need to make changes to your Company Profile.

22. Click on **Primary Data**, then select **Company Profile**.



23. Make changes to fields as needed. Before switching tabs, click **Save**.

24. When changes are made, click **Publish**.
Note: Changes to certain fields on the supplier profile will require Oshkosh approval.

