Sterling Supplier Portal

**IBM**

# Sponsor User Guide

*Documentation Date: 10 June 2014*

# Contents

# Chapter 1. Introduction to IBM Sterling Supplier Portal

Sponsors are organizations that buy products from partners. Sponsor are also known as buyers. Partners are organizations that supply products to sponsors. Partners are also known as suppliers.

IBM® Sterling Supplier Portal enables you as a sponsor to conduct electronic business with a community of smaller, non-EDI trading partners (partners). As a Sterling Supply Chain Visibility sponsor, you can exchange electronic documents with your partners through a Web portal. You can also specify the format in which you want to exchange electronic documents.

**Note:** EDI-capable suppliers can use Sterling Supplier Portal for the Vendor Compliance feature. They can register as partner to a Chargeback Only community and can access their chargeback documents as well as review the non-compliance summary report.

You can create supplier communities and configure the document choreography, business rules, display, and data formats for each supplier community. You can then invite partners to join a supplier community, thus logically grouping your partners based on your business rules.

# Chapter 2. Service Agents

Sterling Supplier Portal also supports the concept of Service Agents, who are third party vendors. The Service Agents are individuals that supply products to the sponsors and handle multiple suppliers.

A sponsor can have more than one Service Agent that caters to a group of suppliers. In Sterling Supplier Portal, the sponsor company is the parent company of a Service Agent. The Service Agent can view the chargeback data and the related documents for all the suppliers pertaining to it. A Service Agent is onboarded in the same way as a partner, although some additional configuration must be performed to enable the partner as a Servicing Agent. For this, you must contact IBM support.

The following diagram displays the hierarchy for setting up a Service Agent in Sterling Supplier Portal.

Sponsor

Service Agent

Supplier 1    Supplier 2    Supplier 3
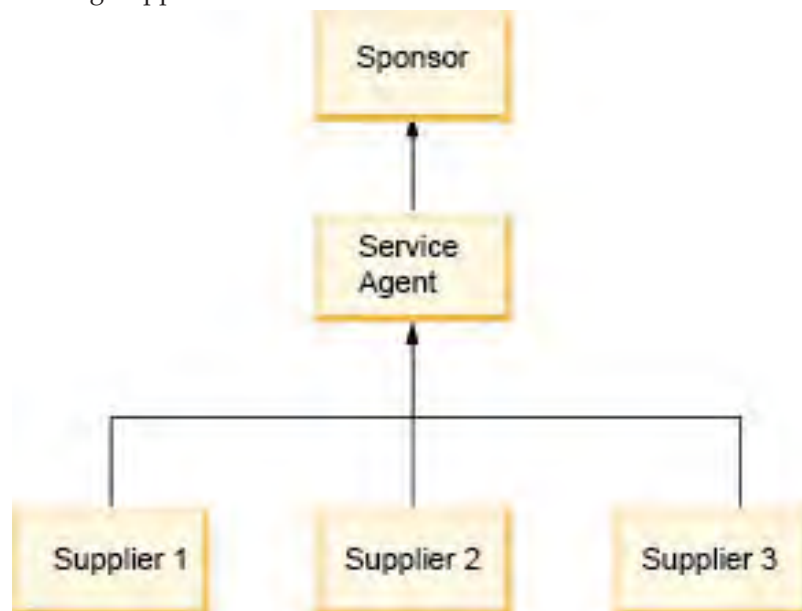
**Note:**
- A Service Agent can have only one sponsor, but a sponsor can have multiple Service Agents catering to a different set of suppliers.
- When a chargeback alert is received and if the Service Agent opens the chargeback Alert first, it will not be displayed in the dashboard for the suppliers of that Service Agent.
- A Service Agent can only view the chargeback details of their suppliers.
- A Service Agent cannot view the chargeback of its suppliers in the New Communications panel.

# Chapter 3. Using Sterling Supplier Portal For the First Time (Sponsor Task)

The Sterling Supplier Portal application Home page is the first screen that is displayed when you log in to Sterling Supplier Portal. Alternatively, you can also click the **Home** hyperlink to view the Home page. In the Home page screen you can view the Dashboard, and the Application Links, Menu Tabs, and Panels that enable you to perform various tasks.

As a Sterling Supplier Portal sponsor, you have many features and capabilities available to you. In general, you can follow the sequence of tasks listed below to begin using this Sterling as a Service application service most effectively.

1. Configure the Dashboard

   A Dashboard comprises different panels that enable you to view concise data pertaining to Sterling Supplier Portal. By default, a Dashboard displays the Alert Summary panel and Community List panel. You can, however, configure a Dashboard to display additional panels such as Answer Distribution Report and Progress Distribution Report.

2. Use the Dashboard

   Depending on your Dashboard configuration, you can use the Dashboard to perform some or all of the following tasks:

   - See the list of communities and number of partners in a community.

   - See the list of alerts, and the number of alerts associated with each alert type, and number of alerts assigned to you.

3. Create a partner in the system

   Sterling Supplier Portal enables you to create a partner.

4. Create a new community

   You can create new communities for existing business lines and define distinct business rules. You can also create additional communities later if you start new business lines.

5. Configure the community as a supplier community

   After creating a community, you must configure it as a supplier community. You can select the choreography, set business rules, and select the user interface layouts for Sterling Supplier Portal. A community that has partners belonging to it cannot be configured as a supplier community, so you should configure a community as a supplier community before adding any partners.

6. Perform additional configurations to a supplier community

   After configuring your community as a supplier community, you can perform additional configurations. For example, you can provide additional configurations about Managing Inventory Upload, Transportation Methods, Packing Slip, Charges, and so forth. The additional configuration parameters available are based on the choreography you selected when configuring a supplier community.

7. Create a Campaign and invite partners that you want to invite to the community

   When you create a community and configure it as a supplier community, you need to create a Campaign to invite partners to join your community. A campaign is a medium of sending an onboarding invitation to your partners.

It can also be used to invite multiple partners at a time. After creating a campaign you can view the details about your campaign in the Campaign Details screen. If you have configured two different communities, you can invite the same partner to be a member of both communities, but using a different campaign.

8. Manage your Profile, Setting up EDI IDs, viewing partner Details

   Sterling Supplier Portal enables you to perform various setup tasks. You can configure your profile information.

   While configuring your profile you can also upload your company logo and this logo will be displayed to your partners when they view the documents they have received from you and the documents sent by your partner will also display the logo.

   **Note:** The system only supports logos in jpg, png, and gif formats.

   You can configure your company branding and add colors to the theme as well.

   The Electronic Data Interchange (EDI) ID is a unique identifier used for exchanging business documents with your Trading partners. You can view, add, and delete EDI IDs. You can also have multiple EDI IDs to transact with different partners.

   You can also search for a specific partner and view their details.

9. Viewing and Managing Alerts

   An alert is an important notification or message that appears in the Alert Summary panel. The Alert Summary panel displays a list of alerts, total number of alerts per alerts type, and alerts assigned to you. You can click on the **Total Alerts** hyperlink to view all the alerts raised for that alert type.

   You can activate and deactivate an alert provided in Sterling Supplier Portal, by selecting and clearing the check boxes against the appropriate alert in the Configure Alerts screen. You can also modify an alert configuration.

10. View Reports

    Sterling Supplier Portal enables you to generate reports to analyze and compare partner performances. The following are the three types or reports that you can generate:

    - Form Activity Report - Details the number of different documents that are exchanged between you and your partners. This report groups the documents based on the document type. This report also displays the total number of documents used in a transaction.

    - Aged Unread Report - Details the duration for which documents are in Unread status.

    - Mail Box Summary - Summarizes the documents you have sent and received, to or from a partner.

11. Delete Programs (Optional)

    A Program consists of different steps such as Question Block, Display Block, and Validation Block.

# Chapter 4. Dashboard

## Using the Dashboard (Sponsor Task)

Sterling Supplier Portal enables you to view all the pertinent data on a Dashboard.

The Dashboard (as shown in the following figure) is the first screen that is displayed when you log in to Sterling Supplier Portal. Alternatively, you can also click the **Home** hyperlink in the Sterling Supplier Portal page. The Home page is displayed, which enables you to view the Dashboard. You can perform the following tasks using the Dashboard:

- Create and Manage Communities

  In the Community List panel you can view the list of communities and number of partners in a community. You can click on the **Community ID** or **Community Name** hyperlink to view the community details. This panel also enables you to create a new community and define distinct business rules. These rules are applicable to partners that join your communities. You can create a new community by clicking on the **Create Community** action in the Community List panel and then you can configure that community as a Supplier community.

- Viewing and Managing Alerts

  In the Alert Summary panel you can view a list of alerts types, total number of alerts per alert type, and number of alerts assigned to you. You can click on the **Total Alerts** hyperlink to view all the alerts raised for that alert type.

  For example, some types of alerts that you can view in your Alert Summary panel are:

  – Upload partner Failed - This alert is raised if partners are not created successfully when using the partner upload (csv) file.

  – Initial Response Not Received - This alert is raised if a partner does not respond to your invitation.

  – Agreement Modified - This alert is raised when there is a modification made to a community, and also when partners, after accepting the terms and conditions, make changes to their response.

    The following figure displays a typical Dashboard:
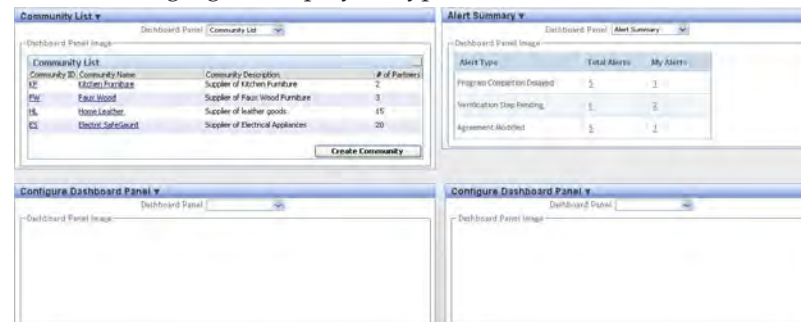


**Related tasks**:

"Configure Dashboard (Sponsor Task)" on page 8
Before you start using the Dashboard, you might want to configure it to view information that you need most often.

"Configure the Community List Panel (Sponsor Task)" on page 8
Sterling Supplier Portal enables you to configure the Community List panel that is displayed on the Dashboard.

# Configure Dashboard (Sponsor Task)

Before you start using the Dashboard, you might want to configure it to view information that you need most often.

## About this task

You can configure the Dashboard to see any of the following panels:

- Community List: This panel provides the list of communities and number of partners in a community.
- Alert List: This panel provides the list of alerts, and the number of alerts associated with each alert type, and number of alerts.

You can view a maximum of five panels in your Dashboard. You can also change the order in which these panels are displayed in the Dashboard.

To configure Dashboard preferences, follow these steps:

## Procedure

1. In the Home page that is displayed, click **Configure Dashboard**.
2. From the **Dashboard Panel** drop-down list, select the panel that you want to view and click **Save**.

   The following table describes the fields that make up the individual Dashboard panels in the Configure Dashboard screen.

| Field | Description |
|---|---|
| Dashboard Panel | From the drop-down list, select the **Community List**. |
| Dashboard Panel Image | Displays the image corresponding to the option selected in the Dashboard panel drop-down list. |

**Related concepts**:

"Using the Dashboard (Sponsor Task)" on page 7
Sterling Supplier Portal enables you to view all the pertinent data on a Dashboard.

# Configure the Community List Panel (Sponsor Task)

Sterling Supplier Portal enables you to configure the Community List panel that is displayed on the Dashboard.

## Procedure

To configure the Community List panel, follow these steps:

1. On the Home page, click **Configure Dashboard**.
2. The various Dashboard panels that are available are displayed. From the Dashboard panel, select **Community List** and click **Save**.
3. The Configure Community List panel is displayed. Click the corresponding **Community ID** or **Community Name** link to view information about the community. To create a new community, click **Create Community**.

   The following table describes the fields on the Configure Community List panel:

| Field | Description |
| --- | --- |
| Community ID | Indicates the identifier of the community. Click the **Community ID** link to view the Community Detail screen, which displays the details of the selected community. |
| Community Name | Indicates the name of the community. Click the **Community Name** link to view the Community Detail screen, which displays the details of the selected community. |
| Community Description | Displays the description of the community. |
| # of Partners | Shows the total number of partners who belong to the corresponding community. |

**Related concepts**:

"Using the Dashboard (Sponsor Task)" on page 7
Sterling Supplier Portal enables you to view all the pertinent data on a Dashboard.

# Chapter 5. Add or Delete EDI Identifiers (Sponsor Task)

You can use Sterling Supplier Portal to add or delete Electronic Data Interchange (EDI) Identifiers.

## Procedure

To add an EDI ID, follow these steps:

1. From the menu bar, click **Setup > Manage My EDI IDs**.
2. The Add/Delete EDI IDs panel is displayed. In the text box in the Add/Delete EDI IDs panel, enter the number of rows to be added.
   a. Click the **Add a Record** icon.
   b. In the **Qualifier** text box, enter the qualifier.
   c. In the **EDI ID** text box, enter the identifier and click **Save**.

## What to do next

When you add or delete an EDI ID in Sterling Supplier Portal, you must also add or delete that EDI ID in IBM Sterling B2B Collaboration Network. You can do that using the Sterling B2B Collaboration Network Document Tracking Tool.

To delete an EDI ID, follow these steps:

1. From the menu bar, click **Setup > Manage My EDI IDs**.
2. In the Add/Delete EDI IDs panel, select the Qualifier of the EDI ID that you want to delete.
3. Click **Delete**.

# Chapter 6. Alerts

## Configure an Alert (Sponsor Task)

An alert is an important notification or message. You can configure whether you want to be notified by email when certain alerts are raised.

You can configure whether to notify your partners when the following alerts are raised:
- Agreement Modified alert
- Step Completed alert
- Verification Completed alert
- Verification Pending alert

For the following alerts, you can configure how long after an event occurs that the alert is raised:
- Initial Response Not Received alert
- Response Completion Delayed alert

## Assign Alerts (Sponsor Task)

You can assign an alert to any user in your organization.

## Close Alerts (Sponsor Task)

Once a user in your organization resolves an alert, you can close that alert.

# Chapter 7. Create a Community (Sponsor Task)

You can use Sterling Supplier Portal to group trading partners logically in a community. You can organize your trading partners into one large supplier community or a series of smaller supplier communities.

## Procedure

To create a community, follow these steps:

1. From the menu bar, click **Community** > **Create Community**. The Create Community page is displayed.
2. Define the following fields in the Create Community panel:

| Field | Description |
|---|---|
| Community ID | Enter the identifier of the community. This field is required and must be unique.<br><br>The Community ID must be 24 characters or less. You can enter the following characters:<br>• A to Z<br>• a to z<br>• 0 to 9<br><br>Special characters are not allowed. |
| Community Name | Enter a name for the community. The name must be 100 characters or less. |
| Community Description | Enter a description of the community. |

3. Click **Save** to create the community.

# Alternate Procedure to Create Community

## Procedure

To create a community, follow these steps:

1. From the menu bar, click **Community** > **Manage Communities**. The Manage Communities page is displayed with the list of your communities.
2. In the My Communities panel of the Manage Communities page, click **Create New**. The Create Community page is displayed.
3. Define the Community ID, name, and description.
4. Click **Save** to create the community.

# Chapter 8. Invite a Partner to Join a Community (Sponsor Task)

You can invite trading partners to join a community that you have configured as a supplier community. The partners use Sterling Supplier Portal to join the community and become your vendors.

## About this task

If you are creating a campaign to invite new partners to a community that you have modified, select the invitation program with the highest version number. For example, if you make changes to a community and want to invite partners to this modified community, select the invitation program with the latest version number.

On the Campaign Detail page, you can view the partners that have accepted the invitation and the status of the invitation.

If you want to execute a program on behalf of a partner and the partner is not registered in IBM Sterling B2B Collaboration Network, the partner does not receive the invitation email. But the agreement is still created.

## Procedure

To invite a partner to join a community, follow these steps:

1. Create a campaign using the Invitation to <Community ID> <version number> Sterling Supplier Portal Community program.
2. Add partners to the campaign. For each organization, you specify the Partner ID:
   - You can enter a maximum of 24 characters for a Partner ID.
   - When you upload a partner to a campaign, a new partner is created if the Partner ID you entered in the file does not match an existing Partner ID in the system.
   - The Partner ID is also used as the Vendor ID of the partner. When the partner receives documents that contain both the Receiver EDI ID and the Vendor ID from the sponsor, the Vendor ID is used to identify the partner if the Receiver EDI ID is not found in the system.
   - If you want to use the Vendor ID to identify your partner instead of the corresponding EDI ID, ensure that the partner does not belong to more than one of your communities.
   - To enable a partner to send shipments for route planning, the Partner ID that you enter must be same as the Vendor ID that you configured for the partner in the Sterling Transportation Management System.
3. On the Campaign Details page, click **Send Notification**. The Send Notification page is displayed.
4. Enter the following fields and click **Send**. You can also broadcast a message, which is posted to the corresponding community.

| Field | Description |
|---|---|
| Attachment | Click the hyperlink to add an attachment for the partner to open. |

| Field | Description |
|---|---|
| Subject | Enter the subject of the notification. The subject is a required field. |
| Message body | Enter a description of the notification. |

**Related concepts**:

Chapter 9, "Resend an Invitation (Sponsor Task)," on page 19
As a sponsor, you can resend an email invitation to the invitees that have not responded to your invitation to join a community.

Chapter 10, "Renotify a Campaign (Sponsor Task)," on page 21
To renotify a campaign, you have to create Dynamic campaigns. In a Dynamic campaign, you can add partners after the campaign has been notified.

# Chapter 9. Resend an Invitation (Sponsor Task)

As a sponsor, you can resend an email invitation to the invitees that have not responded to your invitation to join a community.

You can only resend an invitation to the invitees that have a status of **Campaign Invitee Notified**.

**Related tasks**:

Chapter 8, "Invite a Partner to Join a Community (Sponsor Task)," on page 17
You can invite trading partners to join a community that you have configured as a supplier community. The partners use Sterling Supplier Portal to join the community and become your vendors.

# Chapter 10. Renotify a Campaign (Sponsor Task)

To renotify a campaign, you have to create Dynamic campaigns. In a Dynamic campaign, you can add partners after the campaign has been notified.

When partners are added to a Dynamic campaign that is already notified, the status of the campaign changes to **Renotification Pending**. A notification can then be sent to the new invitees (partners) that you added.

**Related tasks**:

Chapter 8, "Invite a Partner to Join a Community (Sponsor Task)," on page 17
You can invite trading partners to join a community that you have configured as a supplier community. The partners use Sterling Supplier Portal to join the community and become your vendors.

# Chapter 11. Configure a Community as a Supplier Community (Sponsor Task)

When you create a community, you can configure the community as a supplier community.

If an existing community has not been configured as a supplier community, you can modify the community and turn it into a supplier community.

During the shipping process, your partners can use Sterling Supplier Portal to manage the packing of the shipment containers. As a sponsor, you can configure the community so that your partners enter the Lot Number, Quantity, and Manufacturing Date when they pack containers. By default, partners cannot add these entries for a container. Sponsors can contact IBM Customer Support to configure this feature for their suppliers.

## Select a Document Type for the Community

You can select EDI or XML document types for your Sterling Supplier Portal community.

### About this task

You can only configure a community to support one document format. You can select one of the following formats:

- ANSI X12
- EDIFACT
- Sterling XML

After you select a format and navigate away from the Configure As Supplier Community page, you cannot modify the document type for the community.

### Procedure

To select the document type for a community, follow these steps:

1. After you have created and saved a community, the Community Details page is displayed.
2. Click **Configure as Supplier Community**. The Configure As Supplier Community page is displayed.
3. In the Select Document Type for Community panel, select one of the following types:

   **ANSI X12**

   Send and receive documents in the American National Standards Institute (ANSI) EDI X12 format.

   **EDIFACT**

   Send and receive documents in the Electronic Data Interchange For Administration, Commerce, and Transport (EDIFACT) format.

   **Sterling XML**

Send and receive documents in the Sterling XML format.

# Select a Contact for the Step or Answer Block

You can select a contact for the step in which you have selected the choreography for the community when configuring a community a supplier community. However, if you are modifying the community, this step is displayed as an Answer Block and you can modify the step for the Answer Block.

### About this task

To select a contact to the step or the Answer Block, follow these steps:

### Procedure

1. After selecting a document type for the community, the Contact for Step panel is displayed. The fields in this panel are populated only if you have already associated a contact to the step.

   The following table describes the fields in the Contact for Step panel of the Configure As Supplier Community screen:

| Action | Description |
| --- | --- |
| Select Contact | Click this to select a contact for the step.<br>**Note:** After a contact has been assigned to the step, **Select Contact** is changed to **Change Contact**. |

| Field | Description |
| --- | --- |
| Contact Name | Indicates the contact name. |
| Job Title | Indicates the designation of the contact. |
| Email | Indicates the email address of the contact. |

   **Note:** If you are modifying a community, this panel is displayed as Contact for Answer Block panel.
2. Click **Select Contact** to select a contact for the step.
3. In the dialog box that is displayed, perform any one of the following tasks:
   - Create and Associate a New Contact to the Step
   - Associate an Existing Contact to the Step
4. Perform either of the following steps:
   - To save the contact details and associate the contact to the step, click **Save**.
   - To close the dialog box without entering and saving, click **Close**.

# Create and Associate a New Contact to the Step

You can create a new contact and associate it to the step.

### Procedure

To create and associate a new contact to the step, follow these steps:

1. In the dialog box, select **Create New Contact**. The Create Contact panel is displayed.
2. Enter the following contact information:

| Field | Description |
|---|---|
| First Name | Enter the given name (first name) of the contact. |
| Last Name | Enter the family name (last name) of the contact. |
| Email | Enter the email address of the contact. The email address is required. |
| Address Line 1 | Enter the first line of the address. |
| Address Line 2 | Enter the second line of the address, if applicable. |
| Address Line 3 | Enter the third line of the address, if applicable. |
| City | Enter the city where the contact is located. |
| State | Enter the state or province where the contact is located. |
| Zip | Enter the postal code of the city where the contact is located. |
| Country | Select the country or region where the contact is located. |
| Daytime Phone # | Enter the office telephone number of the contact. |
| Mobile Phone # | Enter the mobile phone number of the contact. |
| Fax # | Enter the fax number of the contact. |
| Job Title | Enter the job description of the contact. |

## Associate an Existing Contact to the Step

Sterling Supplier Portal enables you to associate an existing contact to a step.

### About this task

To associate an existing contact to the step, follow these steps:

### Procedure

1. In the dialog box, select the **Use Existing Contact** radio button.
2. The Contact List panel is displayed. Click the **Check** icon adjacent to the contact that you want to associate to the step.

   The following table describes the fields in the Contact List panel of the dialog box.

| Field | Description |
|---|---|
| Contact Name | Indicates the name of the contact. |
| Job Title | Indicates the designation of the contact. |
| Email | Indicates the email address of the contact. |

## Select a Choreography

You can select a choreography for your community.

### Procedure

To define the choreography for your community, follow these steps:

1. After you select a contact for the step, the Choreography panel of the Configure As Supplier Community page is displayed.
2. Select a choreography and the additional documents that are required for the community.

The following table describes the fields in the Choreography panel of the Configure As Supplier Community page:

| Field | Description |
|---|---|
| Select choreography of the community | Select the choreography for the community. The choreography is required.<br><br>Sterling Supplier Portal supports the following choreographies:<br>• Order Only<br>• Order with Additional Documents<br>• Chargeback Only |
| Select additional documents | If you select **Order with Additional Documents** for the choreography, you can choose the documents that your partners are required to provide with the order:<br>• Acknowledgement<br>• Shipment<br>• Invoice<br>• Chargeback<br>• Payment |
| Terms and Conditions document upload required | As an option, you can require your partners to accept your company's terms and conditions document:<br>• Select the **Terms and Conditions document upload required** check box.<br>• Later in the community setup process, you will upload the terms and conditions document.<br>• When partners join your community, they have to download and accept the terms and conditions. |

3. Click the **Question Mark** icon to view more information about a field.
4. Click **Save** to save the choreography and continue setting up your community.

### What to do next

Based on the choreography and documents you select, Sterling Supplier Portal modifies the remaining steps of the community setup process.

# Configure and Upload Templates

You can download sample templates for purchase orders, invoices, and other documents. You can then modify and upload these templates for your partners to use. This step is required when you configure your supplier community.

The templates are Microsoft Excel files.

You can modify and upload the templates, according to your EDI specifications or Sterling XML requirements. You can use the EDI or Sterling XML requirements to help determine the mandatory elements and the elements that can be carried over to the next document.

**Related tasks**:

"Upload EDI Specification Documents" on page 30
Sterling Supplier Portal allows you to upload the documents in formats other than an Excel spreadsheet, including PDF.

"Configuring User-Defined Fields" on page 31
You can use Sterling Supplier Portal to configure user-defined fields.

"Configure Business Rules" on page 34
You can configure business rules for the selected choreography.

# Download Sample Template

Sterling Supplier Portal enables you to download a sample template.

### About this task

To download the sample template, follow these steps:

### Procedure

After selecting a choreography for the community, the Download Sample Templates panel and the Upload Templates panel are displayed. In the Download Sample Templates panel, click the **Sample Template** hyperlink to download the applicable template, based on the selected choreography.

**Note:** The fields in the Download Sample Templates panel are enabled based on the choreography selected in the Choreography panel.
The following table describes the fields in the Download Sample Templates panel in the Configure As Supplier Community screen.

| Field | Description |
|---|---|
| Purchase Order (Sample) | Click this link to download a sample of the Purchase Order. |
| Acknowledgment (Sample) | Click this link to download a sample of the Acknowledgment. |
| ASN (Sample) | Click this link to download a sample of the Advance Shipment Notice (ASN). |
| Invoice (Sample) | Click this link to download a sample of the Invoice. |

**Note:** Click the **Question Mark** icon to view more information about a field.

# Modify a Sample Template

Sterling Supplier Portal enables you to modify a sample template.

### About this task

The sample template is organized in EDI segments and elements that are found in a specific EDI or Sterling XML document type. The editable cells in the template are highlighted in light green.

When filling the template, you can determine whether the EDI elements can be:
* Considered to be a required field
* Displayed on the Sterling Supplier Portal User Interface
* Carried over to another document
* Database (Access Alternatives from a Database)
* Editable
* Format

To modify the sample template, perform the following steps:

## Procedure

1. In the case of the sample template required fields, enter **X** in the corresponding cell or cells.

   The following table is an example of the BEG Segment for the Purchase Order (850) document for ANSI X12.

| Segment Element & Num | Element Description | Data Type | Field Length | Mandatory Field | Display on Sterling Supplier Portal | Carry Over to Another Document |
|---|---|---|---|---|---|---|
| BEG | Beginning Segment | | | | | |
| BEG02 | PO Type Code | ID | 2/2 | X | | |
| BEG03 | PO Number | AN | 1/22 | X | X | X |
| BEG04 | Release Number | AN | 1/30 | | | |
| BEG05 | Date | DT | 8/8 | | X | |

   In the BEG segment of the Purchase Order (850) document for ANSI X12:
   - BEG02 (PO Type Code) – This is a required element for PO. However, the code (indicating if it is an original, replacement, or cancellation order) is not displayed on the Sterling Supplier Portal User Interface and the value is not carried over to another document.
   - BEG03 (PO Number) – This is a required element. It is displayed on the Sterling Supplier Portal User Interface and is carried over to other documents. However, this field is not editable.
   - BEG04 (Release Number) – This is not a required element. This element is not displayed on the Sterling Supplier Portal User Interface, and cannot be carried over to any other documents.
   - BEG05 (PO Date) – This is not a required element. However, if it is sent along with a document, it will be displayed on the Sterling Supplier Portal User Interface. This element is not carried over to any other documents.

   Review this template along with your EDI specifications to help you determine the required elements and the elements that have to be carried over to the next document.

   If an EDI specification is not included in the template, and if this EDI specification is a required field, bring it to the attention of IBM Customer Support for a suitable solution.

   The following table provides an example of some fields in the Order Header for the Purchase Order document for Sterling XML.

| Field | XPath | Data Type | Field Length | Required Field | Display in Sterling Supplier Portal | Carry Over to Another Document |
|---|---|---|---|---|---|---|
| Order Header | | | | | | |
| PO Type | Order/References /Reference [@Name='YWE_ POType]/ @Value | String | 254 | | | |

| Field | XPath | Data Type | Field Length | Required Field | Display in Sterling Supplier Portal | Carry Over to Another Document |
|---|---|---|---|---|---|---|
| Order # | Order/ @CustomerPONo | String | 100 | X | X | X |
| Release # | Order/References /Reference [@Name='YWE_ ReleaseNo]/ @Value | String | 254 | | | |
| Order Date | Order/ @OrderDate | Date | 254 | | | |

In the Order Header of the Purchase Order document for Sterling XML:

- PO Type – This is not a required field for PO. This field is not displayed on the Sterling Supplier Portal User Interface, and cannot be carried over to any other documents.
- Order # – This is a required field. It is displayed on the Sterling Supplier Portal User Interface and is carried over to other documents. However, this field is not editable.
- Release # – This is not a required field. This field is not displayed on the Supplier Portal, and cannot be carried over to any other documents.
- Order Date – This is not a required field. However, if it is sent along with a document, it will be displayed on the Sterling Supplier Portal User Interface. This field is not carried over to any other documents.

2. After configuring the template, save a copy of the template and upload it, and proceed further to complete your Supplier community configuration.

   **Note:** Consider the following points when making changes to a template:
   - Read the instructions provided in a template before entering the necessary information and uploading the template.
   - If a field is marked as Editable, it should be marked as Display in Sterling Supplier Portal in the Excel sheet. Otherwise, the display for that field will assume the default property.
   - In the Excel sheet, if Time or Time Code is selected for display without Date, it will be assumed that Date is also marked for display.
   - In the Excel sheet of Sterling XML, for **Date** fields, Data Type has two values in the drop-down lists: Date and Datetime. By default Date value does not display the time component. You need to choose Datetime as Data Type to display the time component.

3. If you commit errors when validating the rules for the fields in the Excel sheet, the system throws an exception message and displays the details of up to five errors. If there are more than five errors, the exception message displays ellipses after the details pertaining to the first five errors. Resolve all the errors, starting with the first five errors.

4. After all the errors are resolved, upload the Excel sheet.

## Upload Template

You can upload a template to Sterling Supplier Portal. For example, you can provide a purchase order template or invoice template.

**About this task**

When you upload templates, you are required to upload the templates for all the documents that you specified in your choreography.

**Procedure**

To upload a sample template, perform the following steps:

1. Open the Configure As Supplier Community page.
2. In the Upload Templates panel, click the **Attachment** hyperlink to upload the template.

   The following table describes the templates that are available in the Upload Templates panel. A template is only listed if you selected that document when you defined your choreography.

| Field | Description |
|---|---|
| Upload PO Template | Click the attachment link to upload the Purchase Order template. |
| Upload Acknowledgment Template | Click the attachment link to upload the Acknowledgment template. |
| Upload ASN Template | Click the attachment link to upload the ASN template. |
| Upload Invoice Template | Click the attachment link to upload the Invoice template. |
| Terms and Conditions Document | Click the attachment link to upload a terms and conditions document.

When a partner joins your community, the partner is required to download and accept your terms and conditions. |

3. After you select and upload the template, click **Next** to continue setting up your community.

   **Notes:**
   - If you upload an invalid Microsoft Excel template, an error message is displayed.
   - Click the **Question Mark** icon to view more information about a template.

## Upload EDI Specification Documents

Sterling Supplier Portal allows you to upload the documents in formats other than an Excel spreadsheet, including PDF.

**About this task**

Uploading documents in other formats is an optional activity. You can ignore this task if you want, and proceed with the next step of the supplier community configuration, which is configuring the Business Rules panel.

**Procedure**

To upload your EDI specification documents, follow these steps:

1. In the Upload Templates panel, click the **Attachment** hyperlink to upload the downloaded template.

2. Click **Next**.

The EDI Specifications panel is displayed.

The following table describes the fields in the EDI Specifications panel of the Configure As Supplier Community screen:

| Field | Description |
|---|---|
| Specifications for EDI 850 (PDF) | Click this to upload the PDF containing the specifications for EDI 850. |
| Specifications for EDI 855 (PDF) | Click this to upload the PDF containing the specifications for EDI 855. |
| Specifications for EDI 856 (PDF) | Click this to upload the PDF containing the specifications for EDI 856. |
| Specifications for EDI 810 (PDF) | Click this to upload the PDF containing the specifications for EDI 810. |

**Note:** Click the **Question Mark** icon to view more information about a field.

3. Click the **Attachment** hyperlink to upload the PDF containing the specifications for the EDI documents.
4. The **Attachment** dialog box is displayed. In the **Attachment** dialog box:
   a. Enter the name of the attachment and click **Browse** to select the template, and click **Attach File** to upload the template.
   b. Perform either of the following tasks:
      - To continue, click **Continue**.
      - To close the **Attachment** dialog box without entering and saving, click **Close**.

      The following table describes the fields in the **Attachment** dialog box.

| Field | Description |
|---|---|
| Upload File | Click **Browse** and navigate to the location in which you have saved the configured template. Select the file for uploading. |
| Attachment Name | Enter the name of the attachment. |

**Note:**
- The fields in the EDI Specifications panel are enabled based on the choreography selected in the Choreography panel.
- For Sterling XML community, the EDI Specifications page will not be displayed.

**Related concepts**:

"Configure and Upload Templates" on page 26
You can download sample templates for purchase orders, invoices, and other documents. You can then modify and upload these templates for your partners to use. This step is required when you configure your supplier community.

# Configuring User-Defined Fields

You can use Sterling Supplier Portal to configure user-defined fields.

## About this task

These user-defined fields can be passed at the Order/Shipment/Acknowledgment/Invoice Header level and Order/Shipment/Acknowledgment/Invoice Line level of the Purchase Order (850), Change Order (860), Acknowledgment (855), Shipment (856), and Invoice (810) documents.

You can configure a maximum of 10 user-defined fields. The user-defined fields can be defined using the 850 spreadsheet while configuring your community. The user-defined fields you configure are displayed to your partner while viewing the respective Detail screen.

## Procedure

To configure user-defined fields, follow these steps:

1. In the Download Sample Templates panel, click the **Sample Template** hyperlink to download the respective (Sample) template.
2. Open the Additional Attributes worksheet in the respective (Sample) template, enter details about the user-defined fields that you want to configure, and save the Excel sheet. You can configure a maximum of 10 user-defined fields.
3. In the Upload Templates panel, click the **Attachment** hyperlink to upload the filled template.

   The following table describes the fields that make up the Purchase Order/Shipment/Invoice/Acknowledgement Additional Attributes Worksheet.

| Field (Header Level Fields) | Description |
|---|---|
| Reference Identifier | Indicates the default values of the Purchase Order/Shipment/Invoice/Acknowledgment Additional Attributes at the header level. This field is not editable. |
| EDI Segment Element & Num | Enter the EDI segment to which the new field will be mapped at the header level. |
| Label | Enter the name of the label that would be displayed in the respective Detail screen at the header level. |
| Element Description | Enter the brief description of the EDI segment at the header level. This is not a required field and you can use this description for your reference. |
| Editable | Indicates that the marked user-defined fields added at the header level can be edited. This field is not editable. |
| Mandatory Field | Indicates that the marked user-defined fields added at the header leve, are mandatory. |
| Carry Over to ACK | Indicates that the marked user-defined fields added at the header level are displayed in the Acknowledgment Detail screen. |
| Publish to ACK | Indicates that the marked user-defined fields added at the header level are published in the Acknowledgment XML file. |
| Carry Over to ASN | Indicates that the marked user-defined fields added at the header level are displayed in the Shipment Detail screen. |
| Publish to ASN | Indicates that the marked user-defined fields added at the header level are published in the Shipment XML file. |
| Carry Over to Invoice | Indicates that the marked user-defined fields added at the header level are displayed in the Invoice Detail screen. |

| Field (Header Level Fields) | Description |
| --- | --- |
| Publish to Invoice | Indicates that the marked user-defined fields added at the header level are published in the Invoice XML file. |
| Show in Detail | The marked user-defined fields added at the header level are displayed in the respective Detail screen. This field is not editable. |
| Show in Search Criteria | The marked user-defined fields added at the header level are displayed in the respective Search Criteria screen. You can configure to display only five user-defined fields in the Search Criteria screen. |
| Show in List | The marked user-defined fields added at the header level are displayed in the respective List screen. |
| Panel | The marked user-defined fields, added at the header level are displayed in the respective panel in the Shipment Detail screen. The user-defined fields can be configured to be displayed in the Shipping Information panel or in the Transportation Information panel. This field is applicable only for the Shipment template. |

| Field (Line Level Fields) | Description |
| --- | --- |
| Reference Identifier | Indicates the default values of the Purchase Order/Shipment/Invoice/Acknowledgment Additional Attributes at the Line level. This field is not editable. |
| EDI Segment Element &Num | Enter the EDI segment to which the new field will be mapped at the Line level. |
| Label | Enter the name of the label that would be displayed in the respective Detail screen at the Line level. |
| Element Description | Enter the brief description of the EDI segment at the line level. This is not a required field and you can use this description for your reference. |
| Editable | Indicates that the marked user-defined fields added at the Line level can be edited. This field is not editable. |
| Mandatory Field | Indicates that the marked user-defined fields added at the Line level are required. |
| Carry Over to ACK | Indicates that the marked user-defined fields added at the Line level are displayed in the Acknowledgment Detail screen. |
| Publish to ACK | Indicates that the marked user-defined fields added at the Line level are published in the Acknowledgment XML file. |
| Carry Over to ASN | Indicates that the marked user-defined fields added at the Line level are displayed in the Shipment Detail screen. |
| Publish to ASN | Indicates that the marked user-defined fields added at the Line level are published in the Shipment XML file. |
| Carry Over to Invoice | Indicates that the marked user-defined fields added at the Line level are displayed in the Invoice Detail screen. |

| Field (Line Level Fields) | Description |
|---|---|
| Publish to Invoice | Indicates that the marked user-defined fields added at the Line level are published in the Invoice XML file. |
| Show in Detail | The marked user-defined fields added at the Line level are displayed in the respective Detail screen. This field is not editable. |
| Show in Search Criteria | The marked user-defined fields added at the line level are displayed in the respective Search Criteria screen. You can configure to display only five user-defined fields in the Search Criteria screen. |

**Note:**
- When a partner views the Order Detail screen, the user-defined fields configured by you are always displayed.
- The value for each user-defined field should be a maximum of 200 characters.

**Related concepts**:

"Configure and Upload Templates" on page 26
You can download sample templates for purchase orders, invoices, and other documents. You can then modify and upload these templates for your partners to use. This step is required when you configure your supplier community.

# Configure Business Rules

You can configure business rules for the selected choreography.

## About this task

You start by configuring and uploading the templates, uploading EDI specification documents, and configuring user-defined fields. After that, Sterling Supplier Portal displays the Business Rules panel for the selected choreography. Enter the appropriate values in the fields, and click **Next**.

The display of the Configure Business Rules panel is based on the choreography you selected in the Choreography panel.

You can configure the following business rules using the corresponding panels:
- Purchase Order Business Rules
- Purchase Order Acknowledgment Business Rules
- Advance Shipment Notice Business Rules
- Invoice Business Rules

Click the **Question Mark** icon to view more information about a field.

The following table describes the fields in the Purchase Order Business Rules panel.

| Field | Description |
|---|---|
| Do Suppliers need to manually mark every new PO and change PO as read? | Select **Yes** if you require your partners to manually mark each PO and Change PO as **Read**. <br><br> Select **No** if you do not require your partners to manually mark POs and Change POs as **Read**: <br> • The status of the PO is automatically set to **Created**. <br> • Tasks are generated in the partner's Dashboard when the PO is received in the partner's system. <br> • Change orders that are received for the PO are applied directly to the PO. <br><br> This field is required. |
| Specify the number of hours within which all POs must be marked as read | Specify how long the partner has to read each Purchase Order after the partner receives it. <br><br> This field is only enabled if you set **Do Suppliers need to manually mark every new PO and change PO as read?** to **Yes**. <br><br> If partners do not mark the Purchase Orders within the specified number of hours after receiving them, the Purchase Orders are moved to the Overdue Tasks panel. |

The following table describes the fields in the Purchase Order Acknowledgement Business Rules panel.

| Field | Description |
|---|---|
| Days within which PO acknowledgments are expected | Specify how many days the partner has to submit each Purchase Order acknowledgement. <br><br> If partners do not deliver the Purchase Order acknowledgments within the specified number of days after receiving the Purchase Orders, the Acknowledgement tasks are moved to the Overdue Tasks panel. |
| Acknowledgement allowed by | Select the option for which acknowledgment is allowed. This field is required. |
| Over-Acknowledgement Percentage allowed | Enter the over-acknowledgment percentage that is allowed. This value defines the maximum quantity that a partner can acknowledge for an order line. <br><br> For example: <br> 1. You enter 10 as the over-acknowledgment percentage. <br> 2. You place an order for 100 items. <br> 3. Your partner can acknowledge up to 110 items. <br> **Notes:** <br> • If you do not enter a value for the over-acknowledgment percentage, the percentage is set to zero. A partner cannot acknowledge more items than you specified in the original order line. <br> • Validation is not performed when the partner saves an acknowledgment as a draft. <br> • Validation is not performed when the partner rejects an order. |

| Field | Description |
|---|---|
| Under-Acknowledgement Percentage allowed | Enter the under-acknowledgment percentage that is allowed. This value defines the minimum quantity that a partner can acknowledge for an order line. |
| | For example, if you enter 10 as the under-acknowledgment percentage and you place an order for 100 items, your partner cannot acknowledge less than 90 items. |
| | **Notes:** |
| | • If you do not enter a value for the under-acknowledgment percentage, the percentage is set to zero. A partner cannot acknowledge fewer items than you specified in the original order line. |
| | • Validation is not performed when the partner saves an acknowledgment as a draft. |
| | • Validation is not performed when the partner rejects an order. |
| | • Do not set the under-acknowledgment percentage to more than 100. |
| Only one acknowledgment can be sent for PO | Select **Yes** if partners can only send one acknowledgment for each purchase order. |
| Days allowed beyond Requested Shipment Date, when Shipment Date can be acknowledged | Specify how many days after the requested shipment date that your partners have to acknowledge the shipment date. |
| | For example: |
| | 1. You specify 10 days. |
| | 2. You send an order with the requested shipment date as 10 January 2015. |
| | 3. When they acknowledge the order, your partners can enter any date between 10 January 2015 and 20 January 2015 as the acknowledged shipment date. |
| | **Notes:** |
| | • You can enter 0 to 1126 days. |
| | • If you do not enter a value, a partner is allowed to send an Acknowledgement with the shipment date up to 1126 days after the requested shipment date. |
| | • This field is only used by a partner if the **Ack'd Shipment Date** field is marked as editable in the PO Acknowledgement Excel spreadsheet. |
| | • Date validation is done at the order line level. If an order line has multiple schedules (either requested or acknowledged minimum and maximum), then the dates at the order line level are used to validate the date tolerance. |
| | • If you configured a business calendar, date validation for the acknowledged shipment takes into account your business calendar rules. |

| Field | Description |
|---|---|
| Days allowed before Requested Shipment Date, when Shipment Date can be acknowledged | Specify how many days before the requested shipment date that your partners can acknowledge the shipment date.<br><br>For example:<br>1. You specify 10 days.<br>2. You send an order with the requested shipment date as 11 January 2015.<br>3. When they acknowledge the order, your partners can enter any date between 1 January 2015 and 11 January 2015 as the acknowledged shipment date.<br><br>**Notes:**<br>• You can enter 0 to 1126 days.<br>• If you do not enter a value, a partner is allowed to send an Acknowledgement with the shipment date up to 1126 days before the requested shipment date.<br>• This field is only used by a partner if the **Ack'd Shipment Date** field is marked as editable in the PO Acknowledgement Excel spreadsheet.<br>• Date validation is done at the order line level. If an order line has multiple schedules (either requested or acknowledged minimum and maximum), then the dates at the order line level are used to validate the date tolerance.<br>• If you configured a business calendar, date validation for the acknowledged shipment takes into account your business calendar rules. |
| Days allowed beyond Requested Delivery Date, when Delivery Date can be acknowledged | Specify how many days after the requested delivery date that your partners have to acknowledge the delivery date.<br><br>For example:<br>1. You specify 10 days.<br>2. You send an order with the requested delivery date as 10 January 2015.<br>3. When they acknowledge the order, your partners can enter any date between 10 January 2015 and 20 January 2015 as the acknowledged delivery date.<br><br>**Notes:**<br>• You can enter 0 to 1126 days.<br>• If you do not enter a value, a partner is allowed to send an Acknowledgement with the delivery date up to 1126 days after the requested delivery date.<br>• This field is only used by a partner if the **Ack'd Delivery Date** field is marked as editable in the PO Acknowledgement Excel spreadsheet.<br>• Date validation is done at the order line level. If an order line has multiple schedules (either requested or acknowledged minimum and maximum), then the dates at the order line level are used to validate the date tolerance.<br>• If you configured a business calendar, date validation for the acknowledged delivery takes into account your business calendar rules. |

| Field | Description |
|---|---|
| Days allowed before Requested Delivery Date, when Delivery Date can be acknowledged | Specify how many days before the requested delivery date that your partners can acknowledge the delivery date.<br><br>For example:<br>1. You specify 10 days.<br>2. You send an order with the requested delivery date as 11 January 2015.<br>3. When they acknowledge the order, your partners can enter any date between 1 January 2015 and 11 January 2015 as the acknowledged delivery date.<br><br>**Notes:**<br>• You can enter 0 to 1126 days.<br>• If you do not enter a value, a partner is allowed to send an Acknowledgement with the delivery date up to 1126 days before the requested delivery date.<br>• This field is only used by a partner if the **Ack'd Delivery Date** field is marked as editable in the PO Acknowledgement Excel spreadsheet.<br>• Date validation is done at the order line level. If an order line has multiple schedules (either requested or acknowledged minimum and maximum), then the dates at the order line level are used to validate the date tolerance.<br>• If you configured a business calendar, the date validation for the acknowledged delivery takes into account your business calendar rules. |
| Allow line level rejection of an Orderline? | Select **Yes** to specify that a partner can reject an order at the order line level. |

The following table describes the Advance Shipment Notice Business Rules panel.

| Field | Description |
|---|---|
| Days allowed beyond Requested Shipment Date, when a shipment can be made | Specify how many days after the requested shipment date that your partners have to ship the product.<br>**Notes:**<br>• If you do not enter a value, a partner is allowed to ship the product up to 1126 days after the requested shipment date.<br>• If partners do not ship the product within the specified number of days after the requested shipment date, the Shipment task is moved to the Overdue Tasks panel.<br>• If you configured a business calendar, date validation for the shipment date takes into account your business calendar rules. |
| Days allowed before Requested Shipment Date, when a shipment can be made | Specify how many days before the requested shipment date that your partners can ship the product.<br>**Notes:**<br>• If you do not enter a value, a partner is allowed to ship the product up to 1126 days before the requested shipment date.<br>• If you configured a business calendar, date validation for the shipment date takes into account your business calendar rules. |
| Overship percentage allowed | Enter the overship percentage that is allowed. |

| Field | Description |
|---|---|
| Undership percentage allowed | Enter the undership percentage that is allowed. |
| Additional carriers can be used | Select **Yes** if additional carriers can be used to deliver a shipment. |
| Only One Shipment can be sent for a Purchase Order | Select **Yes** if only one shipment can be sent for each Purchase Order. |
| Shipment Date can be before Current Date | Select **Yes** if the shipment date can be before the current date. |
| Delivery Date can be before Current Date | Select **Yes** if the delivery date can be before the current date. |
| Supplier can cancel shipment | Select **Yes** if a partner can cancel a shipment. |
| Supplier can resend shipment | Select **Yes** if a partner can resend a shipment. |
| Perishable items can be considered | Select **Yes** if a shipment can include perishable items. |
| Hazardous material can be considered | Select **Yes** if a shipment can include hazardous items. |
| Printing of container labels is mandatory and shipment should be packed in Cases/Pallets | Select this option to make packing items in cases or on pallets a mandatory task for partners:<br><br>• Select the **Cases** check box if you want your partners to pack a shipment in cases and generate a container label before sending the shipment.<br>• Select the **Pallets** check box if you want your partners to pack a shipment on pallets and generate a container label before sending the shipment.<br><br>The following rules apply to the packing process:<br>• If you do not select this option, your partners can still pack shipments in cases or on pallets. However, the application does not perform any packing validation.<br>• If you select this option, configure the **# of Cartons** and **# of Pallets** fields as non-editable when you define your ASN template.<br>• You cannot configure a community to support both carrier labels and container labels. If you select this option, do not select the **Supplier can print carrier label** option.<br>• Sterling Supplier Portal supports the GS1-128 format for the default container labels. To customize the default container label to suit your requirements, contact IBM.<br>• As a sponsor, you can configure the packing process so that your partners enter the Lot Number, Quantity, and Manufacturing Date. By default, partners cannot add these entries for a container. Sponsors can contact IBM Customer Support to configure this feature for their suppliers. |

| Field | Description |
|---|---|
| Supplier can print carrier label | Select **Yes** if you want partners to generate carrier labels.<br><br>The following rules apply to the carrier label process:<br>• If you select **Supplier can print carrier label**, additional configuration is required to set up carrier integration. For more information, contact IBM. Otherwise, the partner will not be able to generate carrier labels.<br>• You cannot configure a community to support both carrier labels and container labels. If you select this option, do not select the option to make packing items in cases or on pallets a mandatory task. |
| Generate downloadable container labels automatically on packing | Select **Yes** if you want partners to generate downloadable container labels automatically on packing. |
| Supplier can ship from | Select one of the following options:<br>• **any location**: Your partner can ship orders from any facility.<br>• **supplier created locations approved by you**: Your partner can only ship the orders from the locations that your organization approved.<br>• **locations specified by you**: Your partner can only ship orders from locations that your organization uploaded. |

The following table describes the fields in the Invoice Business Rules panel.

| Field | Description |
|---|---|
| Limit will be applied on charges | Select **Yes** if you want to limit the charges by type. |
| Charges Limited by | Select the charge type that is used to limit the charge. This field is required. |
| Charge Limit | Enter the charge limit value. This field is required. |
| Reason Code is required for applying Charges | Select **Yes** if a Reason Code is required for charges. |
| Invoice should contain lines only from single order | Select **Yes** if the Invoice should only specify items from a single order. |

**Related concepts**:

"Configure and Upload Templates" on page 26
You can download sample templates for purchase orders, invoices, and other documents. You can then modify and upload these templates for your partners to use. This step is required when you configure your supplier community.

# Configure the User Interface Layout

You can configure the user interface layout in Sterling Supplier Portal.

## About this task

You can select the applicable User Interface (UI) layout after you configure the business rules.

After you configure business rules for the community, the UI Layout panel is displayed for the documents that you selected in the Choreography panel. Select the applicable UI layout, and click **Next**.

The following table describes the fields on the Choose UI Layout for PO panel on the Configure As Supplier Community page.

| Field | Description |
|---|---|
| Choose UI Layout for PO | Select the required UI layout for the order. This field is required. |
| Preview Layout 1 | Click the corresponding preview page image to preview the first template. |
| Preview Layout 2 | Click the corresponding preview page image to preview the second template. |

The following table describes the fields in the Choose UI Layout for Acknowledgement panel on the Configure As Supplier Community page.

| Field | Description |
|---|---|
| Choose UI Layout for Acknowledgement | Select the UI layout that is required to send an acknowledgment for an order. This field is required. |
| Preview Acknowledgement Layout 1 | Click the corresponding preview page image to preview the first template. |
| Preview Acknowledgement Layout 2 | Click the corresponding preview page image to preview the second template. |

The following table describes the fields in the Choose UI Layout for ASN panel on the Configure As Supplier Community page.

| Field | Description |
|---|---|
| Choose UI Layout for ASN | Select the UI layout that is required to send an ASN for an order. This field is required. |
| Preview ASN Layout 1 | Click the corresponding preview page image to preview the first template. |
| Preview ASN Layout 2 | Click the corresponding preview page image to preview the second template. |

The following table describes the fields in the Choose UI Layout for Invoice panel on the Configure As Supplier Community page.

| Field | Description |
|---|---|
| Choose UI Layout for Invoice | Select the UI layout that is required to send an invoice for an order. This field is required. |

| Field | Description |
|---|---|
| Preview Invoice Layout 1 | Click the corresponding preview page hyperlink to preview the first template. |
| Preview Invoice Layout 2 | Click the corresponding preview page hyperlink to preview the second template. |

# Configure a Payment Method

You can select a payment method after you configure the business rules and select the User Interface (UI) layout, depending on the selected choreography.

## Procedure

To select a payment method, follow these steps:

1. Open the Payment Methods panel of the Configure As Supplier Community page.
2. Select the following payment settings:

| Field | Description |
|---|---|
| Will a Payment Advice be sent? | Select **Yes** if you want to send Payment Advice transactions to partners that belong to this community.<br><br>Select **No** if you do not want to send Payment Advice transactions to partners in the community.<br><br>If you select **Yes**, delayed Payment Advice notifications are displayed in the Overdue Tasks panel of your partner's Dashboard. |
| Send Payment Advice after receiving Invoice within <number of days> Days | Define how many days you have to send a Payment Advice transaction to your partner after you receive the invoice.<br><br>This field is only enabled if you set **Will a Payment Advice be sent?** to **Yes**. |
| Choose Payment Methods | Select one of the following payment methods. This field is required.<br>• Cash<br>• Check<br>• CHIPS<br>• Credit Card<br>• SWIFT |

3. Click **Next** and then click **Save**.
4. Click **Step Completed**.

# Finalize the Community

You complete the community configuration by selecting the agreement start date.

## About this task

After configuring the community as a supplier community, the Capture Agreement Start Date panel is displayed.

Select the start date, which shows when the agreement becomes active. Click the **Calendar Entry** icon to select the start date.

Click **Finalize**. The Agreement Detail page is displayed.

**Notes:**
- You cannot delete a community if open orders are linked to a supplier in the community.
- You cannot delete a partner from a community if an open order exists for that partner.
- When you delete a supplier community, you should manually delete the program that is associated with the community. Otherwise, you cannot create another community that has the same Community ID as the one you deleted.

# Chapter 12. Modify a Community

You can modify a community in Sterling Supplier Portal.

## Procedure

To modify a community, follow these steps:

1. From the menu bar, click **Community > Manage Communities**. The Manage Communities page opens and displays a list of your communities.

   The following table describes the actions you can take on the Manage Communities page:

   | Action | Description |
   | --- | --- |
   | Post New Message | Add a message for the selected communities. |
   | View Details | View information about the selected communities. |
   | Create New | Define a new community. |
   | Delete | Remove the selected communities. |

   The following table describes the fields on the Manage Communities page:

   | Field | Description |
   | --- | --- |
   | Community ID | Indicates the identifier of a community. |
   | Community Name | Indicates the name of a community. |
   | Community Description | Provides a short description of a community. |
   | # of Partners | Indicates the total number of partners in a community. |

2. Select the check box for the Community ID you want to work with and click **View Details**. You can also click the **Community ID** link or the **Community Name** link. The Community Detail page is displayed, which contains the following panels:

   **Bulletin Board**

   Use this panel to post and view messages about the community.

   **Community Information**

   This panel provides information about the number of partners in the community. Partners that belong to a community can receive the messages you broadcast to that community.

   The following table describes the actions in the Bulletin Board panel:

   | Action | Description |
   | --- | --- |
   | Post New Message | Write a new message for a community. |
   | Delete | Delete a message that is posted to a community. |
   | Edit | Update a message that is posted to a community. The most recently modified message is displayed for editing. |

   The following table describes the fields in the Bulletin Board panel:

| Field | Description |
|-------|-------------|
| Message | Displays a message summary. |
| Posted On | Shows the date the message was posted to a community. |

3. On the Community Detail page, click the **Configure as Supplier Community** hyperlink. The Community Detail page is refreshed.

   The following table describes the actions in the Community Information panel on the Community Detail page:

| Action | Description |
|--------|-------------|
| Modify Community | Click this to modify the community details. |
| Manage Inventory Upload | Click this to specify whether the partners in the community are required to send inventory updates. |

The following table describes the fields in the Community Information panel on the Community Detail page:

| Field | Description |
|-------|-------------|
| Name | Shows the name of the community. |
| Document Type | Shows the type of document that is supported by the community. Sterling Supplier Portal supports the following types:<br>• EDI ANSI X12<br>• EDIFACT<br>• Sterling XML |
| Choreography | Shows the choreography for the community. |
| Created On | Shows the date the community was created. |
| Payment Advice will be sent | Shows whether the sponsor sends Payment Advice transactions to the partners in this community. |
| Payments In | Shows the mode of payment you selected for the community. |
| Time to receive Payment Notification for Supplier after sending invoice | Shows when the supplier is expecting to receive the payment notification after sending the invoice. |

4. In the Community Information panel, click **Modify Community** to update the community details. The Edit <Community> page opens and displays the Contact for Answer Block and Choreography panels:

   **Contact for Answer Block Panel**

   Click **Select Contact** to assign a contact to the Answer Block. You can either create a new contact or assign an existing contact to the answer block.

   When you create a contact, the **Select Contact** link is displayed if you have not associated a contact to the answer block.

   If you have assigned a contact to the answer block, the **Change Contact** link is displayed.

   **Choreography Panel**

   Select the choreography for the community:

- Order Only
- Order with Additional Documents
- Chargeback Only

5. Click **Next** to continue the community configuration process. To return to the Community Detail page, repeat Step 1 and Step 2.

## What to do next

When you modify the community details, it might take up to 15 minutes to process the updates.

During the shipping process, your partners can use Sterling Supplier Portal to manage the packing of the shipment containers. As a sponsor, you can configure the community so that your partners enter the Lot Number, Quantity, and Manufacturing Date when they pack containers. By default, partners cannot add these entries for a container. Sponsors can contact IBM Customer Support to configure this feature for their suppliers.

# Chapter 13. Configure Inventory Upload

Sterling Supplier Portal enables you to configure the inventory upload.

## Procedure

To configure the inventory upload, follow these steps:

1. From the menu bar in Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box for the Community ID whose details you want to view, and click **View Details**. You can also click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Community Information panel of the Community Detail screen that is displayed, click **Manage Inventory Upload**.
5. The Manage Inventory Upload screen is displayed. To allow all trading partners belonging to the community to send inventory updates, select the check box and click **Save**.
6. You should perform additional configuration tasks in order to receive the inventory updates from your partner. You have to contact the IBM Support team to perform this additional configuration.

# Chapter 14. Configure Acknowledgment Transportation Methods

Sterling Supplier Portal enables you to configure acknowledgment transportation methods.

## About this task

To configure acknowledgment transportation methods, follow these steps:

## Procedure

1. From the menu bar in the Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click either the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Acknowledgment Details panel of the Community Detail screen that is displayed, click **Acknowledgment Transportation Methods**.
5. In the Configure Transport Methods dialog box that is displayed, perform the following steps:

   In the field at the bottom of the dialog box, enter the number of transport methods that you want to add, and click the **Add a Record** icon.

   a. In each of the new rows, enter the appropriate values, and click **Save**.
   b. To delete a transportation method, select the check box against the corresponding method, and click **Remove**.

   The following table describes the fields in the Configure Transport Methods dialog box:

| Action | Description |
|---|---|
| Remove | Click this to remove the details for a transportation method. |

| Field | Description |
|---|---|
| Transportation Method Code | Enter the unique Transportation Method Code. |
| Transportation Method Value | Enter the description of a transportation method. |

| Field | Description |
|---|---|
| Sequence # (Unique) | Enter the unique sequence number for a transportation method.<br><br>This transportation method is displayed in the Transportation Method list (which is located in the Primary Information panel in the Create Acknowledgement screen). The transportation method is displayed in the sequence you enter here.<br><br>For example, if you have entered 1 as the sequence number, the transportation method will be displayed as the first option in the Transportation Method list. |

**Note:** Some transportation methods are provided out of the box for communities that support documents that are in ANSI X12 and EDIFACT formats, but not for communities that support documents that are in Sterling XML format.

# Chapter 15. Configure a Packing Slip

You can use Sterling Supplier Portal to configure a packing slip.

## About this task

You can configure the header and footer information of the packing slip for each community.

Only one logo is provided by default for each sponsor, which you can use for all your packing slips. If you want to upload different logos for different communities, contact your IBM Onboarding manager during the setup phase, or IBM Customer Support after the setup phase. The logos must be in the .jpg, .png, or .gif formats.

## Procedure

To configure a packing slip, follow these steps:

1. From the menu bar in Sterling Supplier Portal, click **Community** > **Manage Communities**. The Manage Communities page is displayed with a list of communities.
2. Select a **Community ID** and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. When the Community Detail page opens, click **Configure as Supplier Community**.
4. In the Advance Shipment Notice Details panel of the Community Detail page, click **Manage Packing Slip**. The **Packing Slip** page is displayed.

   The following table describes the fields on the **Configure Packing Slip** page:

   | Field | Description |
   |---|---|
   | Header Information | Enter the information to be displayed below the logo of the packing slip. For example, you can provide your address, telephone number, fax number, and email address.<br><br>You can enter up to 255 characters. |
   | Footer Message | Enter additional information to be displayed at the bottom of the packing slip. For example, you might want to display information about discount offers or the return policye.<br><br>You can enter up to 2000 characters. |

# Chapter 16. Configure the Default Container

For communities that have been configured to allow generation of carrier labels, you can specify the dimensions of the default container. These dimensions will be displayed in the Container panel of the Create Shipment screen when a partner creates a shipment.

## About this task

The dimensions in the default container displayed as fields in the Create Shipment screen can be edited by the partner depending on the Advance Shipment Notice (ASN) Excel spreadsheet as configured by you. Following are the recommended configurations that should be performed in the ASN Excel spreadsheet for carrier integration:

- Set the Tracking # field as displayable and non-editable.
- Set the Height, Weight, and Width fields as displayable and non-editable. The remaining container attributes should be set as editable.
- Set the SCAC field as non-editable.

To configure the default container, perform the following steps:

## Procedure

1. From the menu bar in Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID for which you want to view details and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Advance Shipment Notice Details panel of the Community Detail screen, click **Manage Default Container**. The Default Container dialog box is displayed.

   The following table describes the fields in the Default Container dialog box.

| Field | Description |
|---|---|
| Length | Enter the length of the default container for the community. |
| Width | Enter the width of the default container for the community. |
| Height | Enter the height of the default container for the community. |
| UOM | Select the unit of measure (UOM) of the default container for the community from the list. |

# Chapter 17. Configure a Standard Carrier Alpha Code and Service

A Standard Alpha Carrier Code (SCAC) is a unique 2-4 letter code used to identify transportation companies. You can configure an SCAC and service using the Sterling Supplier Portal Community Detail screen.

## About this task

To configure a Standard Carrier Alpha Code (SCAC) and service, perform the following steps:

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID for which you want to view details and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Advance Shipment Notice Details panel of the Community Detail screen, click **SCAC & Services**.
5. In the Configure SCAC & Services dialog box that is displayed, perform the following steps:
   a. In the field at the bottom of the dialog box, enter the number of carriers that you want to add, and click the **add** icon.
   b. In each of the new rows, enter the appropriate values, and click **Save**.

   To delete a carrier, select the check box against the corresponding carrier, and click **Remove**.

   The following table describes the fields in the Configure SCAC & Services dialog box.

| Action | Description |
|---|---|
| Remove | Click to remove the carrier details. |
| **Field** | **Description** |
| SCAC (Carrier) | Enter the SCAC, which is a unique 2-4 letter code used to identify transportation companies.<br><br>Alternatively, click the **search** icon to search for a carrier.<br>**Note:** Sponsors can configure carriers (SCAC) for a community. The carriers configured by a sponsor are available to other sponsors also. |
| Carrier Service | Enter the carrier and service name. |
| SCAC And Service Code | Enter the SCAC and Service Code. |
| SCAC And Service Description | Enter the description of the SCAC and service. |

| Action | Description |
|--------|-------------|
| Shipment Mode | Select the mode of shipment. |

**Note:** The system supports only the following characters in these fields:

- a-z
- A-Z
- 0-9
- Special characters such as space, comma, dot, hyphen, single quote, and underscore.

# Chapter 18. Configure Equipment Type

You can configure equipment types for your community.

## Procedure

To configure equipment types, follow these steps:

1. From the menu bar of Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select a **Community ID** check box and click **View Details**. You can also click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the **Advance Shipment Notice Details** panel of the Community Details screen, click **Manage Equipment Type**. The Manage Equipment Type dialog box opens.
5. Enter the number of equipment types that you want to add and then click the **Add** icon.
6. Enter the **Equipment Type Code** and **Equipment Type Description**.

   The system support the following characters in these fields:
   - a-z
   - A-Z
   - 0-9
   - The following special characters: space, dot, hyphen, underscore, equal sign, plus sign, question mark, tilde (~), caret (^), exclamation point, forward slash (/)
7. If you want to delete an equipment type, select its check box and click **Remove**.
8. When you are done defining equipment types, click **Save**.

# Chapter 19. Configure Routing Attributes

You can configure routing attributes for your community.

## Procedure

To configure routing attributes, follow these steps:

1. From the menu bar of Sterling Supplier Portal, navigate to **Community** > **Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select a **Community ID** checkbox and click **View Details**. You can also click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the **Advance Shipment Notice Details** panel of the Community Details screen, click **Manage Routing Attribute**. The Manage Routing Attribute dialog box opens.
5. Enter the number of routing attributes that you want to add and then click the **Add** icon.
6. Enter the **Routing Attribute Code** and **Routing Type Description**.

   The system supports the following characters in these fields:
   - a-z
   - A-Z
   - 0-9
   - The following special characters: space, dot, hyphen, underscore, equal sign, plus sign, question mark, tilde (~), caret (^), exclamation point, forward slash (/)
7. If you want to delete a routing attribute, select its check box and click **Remove**.
8. When you are done defining routing attributes, click **Save**.

# Chapter 20. Configure Shipment Transportation Methods

Sterling Supplier Portal enables you to configure shipment transportation methods.

## About this task

To configure transport methods, perform the following steps:

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click either the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Advance Shipment Notice Details panel of the Community Detail screen, click **Shipment Transportation Methods**.
5. In the Configure Transport Methods dialog box that is displayed, perform the following steps:
   a. In the field at the bottom of the dialog box, enter the number of transport methods that you want to add, and click the **add** icon.
   b. In each of the new rows, enter the appropriate values, and click **Save**.

   To delete a shipping transportation method, select the check box against the corresponding method, and click **Remove**.

   The following table describes the fields in the Configure Transport Methods dialog box.

| Action | Description |
|--------|-------------|
| Remove | Click this to remove the details for a transportation method. |

| Field | Description |
|-------|-------------|
| Transportation Method Code | Enter the unique Transportation Method Code. |
| Transportation Method Value | Enter the description of the transportation. |
| Sequence # (Unique) | Enter the unique sequence number for a transportation method.<br><br>This transportation method is displayed in the Transportation Method drop-down list (in the Search Criteria - Find Shipment panel in the Find Shipment screen) in the sequence you enter here.<br><br>For example, if you have entered 1 as the sequence number, the transportation method will be displayed as the first option in the Transportation Method list. |

**Note:** Some transportation methods are provided out of the box for communities that support documents that are in ANSI X12 and EDIFACT formats, but not for communities that support documents that are in Sterling XML format.

# Chapter 21. Configure Invoice Charges

Sterling Supplier Portal enables you to configure invoice charges.

## About this task

To configure a charge, perform the following steps:

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Invoice Details panel of the Community Detail screen, click **Charges**.
5. To add a new Charge, perform the following steps in the Configure Charges dialog box:
   a. In the field at the bottom of the dialog box, enter the number of charges that you want to add and click the **add** icon.
   b. In each of the new rows, enter the appropriate values.
   c. Click **Save**.
6. To delete a Charge, select the check box against the corresponding charge and click **Remove**.

   The following table describes the fields in the Configure Charges panel.

| Action | Description |
|--------|-------------|
| Remove | Click this to delete a charge. |
|        |             |

| Field | Description |
|-------|-------------|
| Charge | Enter the charge type. |
| Description | Enter the description of the charge. |
| Discount? | Select this check box if the charge you are configuring is a discount. |

**Note:** The system supports only the following characters in these fields:
- a-z
- A-Z
- 0-9
- Special characters such as space, comma, dot, hyphen, single quote, and underscore.

# Chapter 22. Configure Purchase Order Charges

Sterling Supplier Portal enables you to configure purchase order charges.

## About this task

To configure a Purchase Order (PO) Charge, perform the following steps:

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the PO Details panel of the Community Detail screen, click **Charges**.
5. To add a new PO Charge, perform the following steps in the Configure Charges dialog box:
   a. In the field at the bottom of the dialog box, enter the number of charges that you want to add and click the **add** icon.
   b. In each of the new rows, enter the appropriate values.
   c. Click **Save**.
6. If you want to select the system defined charges, perform the following steps in the Configure Charges dialog box:
   a. Click the **search** icon. The **Search Criteria** panel is displayed. Enter the search criteria and click **Search**.
   b. The Search List panel is displayed with the list of charge names. From this list, select the check box against the Charge Name to be added in the Configure Charges panel.
   c. Click **Save**.
7. To delete charges, select the check box against the corresponding charge and click **Remove**.

   The following table describes the fields that make up the Search Criteria - Find Charge Name panel.

   | Field | Description |
   | --- | --- |
   | Charge Name | Select the name of the charge to be included in the search. |
   | Max Records | Enter the maximum number of charges that are displayed in the **Search List** panel. |

   The following table describes the fields that make up the Search List panel.

   | Field | Description |
   | --- | --- |
   | Charge Name | Indicates the name of the charge. |
   | Charge Description | Indicates the details of the charge. |

| Field | Description |
|---|---|
| Discount? | This field may contain either of the following values:<br><br>Y - Indicates that configured charge is a discount.<br><br>N - Indicates that configured charge is not a discount. |

The following table describes the fields in the Configure PO Charges panel.

| Action | Description |
|---|---|
| Remove | Click this to delete charges. |

| Field | Description |
|---|---|
| Charge Name | Enter the name of the charge. |
| Charge Description | Enter the description of the charge. |
| Discount? | Select this check box if the charge you are configuring is a discount. |

# Chapter 23. Configure Details of a Tax

Sterling Supplier Portal enables you to configure details for tax types, such as VAT.

## About this task

To configure details of a tax, perform the following steps:

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. In the Invoice Details panel of the Community Detail screen, click **Taxes**.
5. In the Configure Taxes dialog box that is displayed, perform the following steps:
   a. In the field at the bottom of the dialog box, enter the number of tax that you want to add, and click the **add** icon.
   b. In each of the new rows, enter the appropriate values, and click **Save**.

   To delete a tax select the check box against the corresponding method, and click **Remove**.

   The following table describes the fields in the Configure Taxes dialog box.

| Action | Description |
|--------|-------------|
| Remove | Click this to remove the details for a tax. |

| Field | Description |
|-------|-------------|
| Tax | Enter the tax type. For example, if you want the supplier to enter VAT as a tax type, then you need to configure a tax with the name VAT. |
| Description | Enter the description of the tax. |

**Note:** The system supports only the following characters in these fields:

- a-z
- A-Z
- 0-9
- Special characters such as space, comma, dot, hyphen, single quote, and underscore.

# Chapter 24. Configure a Reason Code

Sterling Supplier Portal enables you to configure reason codes in invoice details.

## About this task

To configure a reason code, perform the following steps.

## Procedure

1. From the menu bar of Sterling Supplier Portal, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select the check box against the Community ID whose details you want to view, and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or **Community Name** hyperlink to view details about a community.
3. The Community Details screen is displayed. Click **Configure as Supplier Community**.
4. Click **Reason Code** in the Invoice Details panel of the Community Detail screen.
5. In the Configure Reason Code dialog box that is displayed, perform the following steps:
    a. In the field at the bottom of the dialog box, enter the number of reason codes that you want to add, and click the **add** icon.
    b. In each of the new rows, enter the appropriate values, and click **Save**.

    To delete a reason code, select the check box against the corresponding method, and click **Remove**.

    The following table describes the fields in the Configure Reason Codes dialog box.

| Action | Description |
|--------|-------------|
| Remove | Click this to remove the details for a reason code. |

| Field | Description |
|-------|-------------|
| Reason Code | Enter a reason code. |
| Description | Enter the description of the reason code. |

# Chapter 25. Community Details

You can preview the layout that you have configured to display the PO, Acknowledgment, ASN, and Invoice details to your partner when configuring the community.

## About this task

To preview the details layout, perform the following steps:

## Procedure

1. From the Sterling Supplier Portal menu bar, navigate to **Community > Manage Communities**.
2. The Manage Communities screen is displayed with a list of communities. Select a Community ID checkbox, and click **View Details**. Alternatively, you can click the **Community ID** hyperlink or the **Community Name** hyperlink to view details about a community.
3. The Community Detail screen is displayed. Click **Configure as Supplier Community**.
   - To view the PO Details layout, click **Preview** in the PO Details panel of the Community Detail screen. A sample PO detail is displayed in the layout you selected when configuring the community.

   The following table describes the field in the PO Details panel of the Community Detail screen.

| Action | Description |
|---|---|
| Charges | Click to configure a new PO Charge. |

| Field | Description |
|---|---|
| Time after receipt within which POs should be read | The time within which the purchase orders should be read after you receive them. |

   - To view the Acknowledgment Details layout, click **Preview** in the Acknowledgment Details panel of the Community Detail screen. The sample Acknowledgment detail is displayed in the layout you selected when configuring the community.

   The following table describes the Acknowledgment Details panel fields.

| Action | Description |
|---|---|
| Acknowledgment Transportation Methods | Click this to configure acknowledgment transportation methods for the community. |

| Field | Description |
|---|---|
| Time after receipt within which POs should be acknowledged | The time within which the purchase orders should be acknowledged after you receive them. |
| Allow acknowledgment by each line item | The acknowledgment is allowed for each line item. If this is not set, partners can only acknowledge or reject the entire order. |

| Field | Description |
|---|---|
| Only one acknowledgment can be sent for a PO | Indicates that only one acknowledgment can be sent for a purchase order. |
| No. of days Acknowledged ship date can be later than Requested ship date | Indicates the number of days beyond the requested shipment date of the order within which the shipment date acknowledged by the partner should fall.<br><br>For example, consider that you have entered 10 days in this field and then sent an order with the requested shipment date as 01/10/2010. When acknowledging the order, your partner can enter any date between 01/10/2010 and 01/20/2010 as the acknowledged shipment date. |
| No. of days Acknowledged ship date can be earlier than Requested ship date | Indicates the number of days prior to the requested shipment date of the order within which the shipment date acknowledged by the partner should fall.<br><br>For example, consider that you have entered 10 days in this field and then sent an order with the requested shipment date as 01/11/2010. When acknowledging the order, your partner can enter any date between 01/01/2010 and 01/11/2010 as the acknowledged shipment date. |
| No. of days Acknowledged delivery date can be later than Requested delivery date | Indicates the number of days beyond the requested delivery date of the order within which the delivery date acknowledged by the partner should fall.<br><br>For example, consider that you have entered 10 days in this field and then sent an order with the requested delivery date as 01/10/2010. When acknowledging the order, your partner can enter any date between 01/10/2010 and 01/20/2010 as the acknowledged delivery date. |
| No. of days Acknowledged delivery date can be earlier than Requested delivery date | Indicates the number of days prior to the requested delivery date of the order within which the delivery date acknowledged by the partner should fall.<br><br>For example, consider that you have entered 10 days in this field and then sent an order with the requested delivery date as 01/11/2010. When acknowledging the order, your partner can enter any date between 01/01/2010 and 01/11/2010 as the acknowledged delivery date. |

- To view the Advance Shipment Notice Details layout, click **Preview** in the Advance Shipment Notice Details panel of the Community Detail screen. The sample Advance Shipment Notice detail is displayed in the layout you selected when configuring the community.

  The following table describes the fields in the Advance Shipment Notice Details panel.

| Action | Description |
|---|---|
| Manage Default Container | Use to configure the default container for the community. |

| Action | Description |
|---|---|
| Scac & Services | Use to configure the carriers and services for the community. |
| Manage Equipment Type | Use to configure the equipment types for the community. |
| Shipment Transportation Methods | Use to configure shipment transportation methods for the community. |
| Manage Packing Slip | Use to configure a packing slip for the community. |
| Manage Routing Attribute | Use to configure the routing attributes for the community. |

| Field | Description |
|---|---|
| No. of days Actual ship date can be later than Requested ship date | Number of days by which the actual ship date can be delayed beyond the requested ship date. If you do not specify a value in this field, the default value of 1126 days is used. |
| No. of days Actual ship date can be earlier than Requested ship date | Number of days by which the actual ship date can be advanced before the requested ship date. If you do not specify a value in this field, the default value of 1126 days is used. |
| Only one shipment can be sent for a PO | Whether only one shipment can be sent for a purchase order. |
| Additional carriers can be added | Whether partners can use their own carriers. These will be in addition to those selected by you. |
| Order quantity can be delivered in excess by percentage amount | Percentage by which the delivered quantity for each order line can be more than the ordered quantity. |
| Order quantity can be delivered in less by percentage amount | Percentage by which the delivered quantity for each order line can be less than the ordered quantity. |
| Can ship date be before current date | Whether the ship date can be prior to the current date. |
| Can delivery date be before current date | Whether the delivery date can be prior to the current date. |
| Can supplier cancel shipment | Whether partners can cancel a shipment. |
| Can supplier resend shipment | Whether partners can resend a shipment. |
| Perishable items can be considered | Whether perishable items can be included in the shipment. |
| Hazardous material can be considered | Whether hazardous material can be included in the shipment. |
| Can supplier print parcel carrier label | Whether partners can generate tracking numbers and print carrier labels. If the value is **Y**, it implies that the account for each partner is set up with IBM for the carrier integration. |

- To view the Invoice Details layout, click **Preview** in the Invoice Details panel of the Community Detail screen. The sample Invoice detail is displayed in the layout selected by you when configuring the community.

  The following table describes the fields that make up the Invoice Details panel.

| Action | Description |
| --- | --- |
| Charges | Click to configure an invoice charge. |
| Configure Taxes | Click to configure details of a tax. |
| Reason Code | Click to configure a reason code. |

| Field | Description |
| --- | --- |
| Is reason code required for charges | Indicates if reason code is required for charges. |
| Limit type to be applied on the charges | Indicates the limit type to be applied to the charges. The type can be either a percentage or an absolute value. |
| Limit value to be applied to the charges | Indicates the limit value to be applied to the charges. |

# Chapter 26. Configure Replace Order

Sterling Supplier Portal enables the sponsors to replace an existing order.

## About this task

After you perform the replace order configuration and you create an order that already exists in the system, the document is treated as a change order. By default the replace order option is not available for a new community. You should perform some additional configuration to replace an order. For more information on configuring replace order, contact the IBM Support team.

# Chapter 27. Configure PO Print

Sterling Supplier Portal enables the sponsors to display the Requested Shipment and Delivery Date range in the **PO Print** option.

## About this task

Certain configurations have to be performed in order to display the date ranges, for which you must contact the IBM support team.

# Chapter 28. Creating a Partner (Sponsor Task)

You can create a partner profile in Sterling Supplier Portal. The profile contains basic information about the partner and specifies the contact people at that organization.

## About this task

You can also convert a member, who has a public profile in Sterling Supplier Portal, into a partner.

When you create a partner profile, you enter the **Partner ID** in the Partner Info panel of the Manage Contacts/Partners page:
- You can enter a maximum of 24 characters for a Partner ID.
- The Partner ID serves as the unique identifier of the partner in Sterling Supplier Portal.
- The Partner ID is also used as the Vendor ID for the partner. When the partner receives documents that contain both a Receiver EDI ID and a Vendor ID from the sponsor, the Vendor ID is used to identify the partner if the Receiver EDI ID is not found in the system.
- If you want to use the Vendor ID to identify your partner instead of the corresponding EDI ID, ensure that the partner does not belong to more than one of your communities.

If your organization subscribes to the Sterling Transportation Management System, the Partner ID you define in Sterling Supplier Portal must match the Vendor ID that you configured for this partner in Sterling TMS.

## What to do next

Your partners define and update their company profile in Sterling Customer Center. When a partner updates the company profile, Sterling Customer Center sends the updated information to Sterling Supplier Portal.

Sterling Supplier Portal displays the updated partner information on pages such as the Create Shipment page and the Create Invoice page.

Contact IBM Customer Support if you want to be notified when a partner updates the company profile. The Sterling Supplier Portal Onboarding team can work with you to implement a process for sending you the updated company profiles. By default, the sponsor is not notified when the partner changes the company profile in Sterling Customer Center.

# Viewing Partner Details (Sponsor Task)

You can view details for a partner profile in Sterling Supplier Portal.

## Procedure

To view partner details, follow these steps:

1. From the menu bar, click **Setup > View Partner Info**. The Search Criteria - Find Supplier panel is displayed.
2. Enter your search criteria:

| Field | Description |
|---|---|
| Saved Searches | Run a saved search. |
| Save this Search | Save the current search criteria as a favorite search. |
| Delete Current Search | Delete a saved search. |
| Partner ID | Enter the identifier of the partner you are searching for. |
| Partner Name | Enter the name of the partner you are searching for. |
| Max Records | Enter the maximum number of records to be displayed. The default value is 30. |

3. Click **Search**. Partners that match the search criteria are listed in the Search List panel.

   The following table describes the actions in the Search List panel:

| Action | Description |
|---|---|
| View Details | Select a partner and click **View Details** to see the partner profile. |
| Configure New Ship From Location | Select a partner and click **Configure New Ship From Location** to set up your version of the ship from location.

The New Ship From Locations page opens, which shows the ship from location details for both the partner and the sponsor.

Enter the location ID, name, address, contact numbers, and supplier ID of the new location and click **Save All**.

To make the sponsor version of the ship from location the same as the details of the partner location, select the **Same as Partner's Version** check box. |

The following table describes the fields in the Search List panel:

| Field | Description |
|---|---|
| Partner ID | Shows the identifier of the partner.

Click the **Partner ID** hyperlink to view the Partner Details page for the partner. |
| Partner Name | Shows the name of the partner.

Click the **Partner Name** hyperlink to view the Partner Details page for the partner. |
| City | Shows the city where the partner is located. |

4. Select a partner and click **View Details**. You can also click the **Partner ID** link or the **Partner Name** link for this company. The Partner Detail page is displayed.

   The following table describes the fields in the Partner Details panel on the Partner Detail page:

| Field | Description |
|---|---|
| Partner Name | Shows the name of the partner. |

| Field | Description |
|---|---|
| Partner ID | Shows the identifier of the partner. |
| Partner Address | Shows the address of the partner. |

The following table describes the fields in the EDI IDs panel on the Partner Detail page:

| Field | Description |
|---|---|
| Community | Shows the name of the community.<br><br>Click the **Community** link to view the Community Details page, which displays information about the selected community. |
| Qualifier | Shows the qualifier of the EDI ID for the community. |
| EDI ID | Shows the EDI ID of the community, which uniquely identifies a Supplier-Community pair. |

The following table describe the action in the Ship From Locations panel on the Partner Details page:

| Action | Description |
|---|---|
| Update | Click **Update** to modify the ship from location details.<br><br>The Update Ship From Locations page opens and shows the partner version and the sponsor version of the ship from location. Modify the required details and click **Save All**.<br><br>To make the sponsor version of the ship from location the same as the details of the partner version, select the **Same as Partner's Version** check box. |

The following table describe the fields in the Ship From Locations panel on the Partner Details page:

| Field | Description |
|---|---|
| Ship From Location | Shows the sponsor version of the ship from location details.<br><br>The location ID, name, address, contact numbers, and supplier ID of the partner are also displayed. |

## Viewing Partner Agreements (Sponsor Task)

You can view the agreements you have established with the partner in Sterling Supplier Portal.

## Exporting a List of Partners in CSV Format (Sponsor Task)

As a sponsor, you can export the list of partners that have been added to a campaign. You can save the list in CSV format and then open it in a spreadsheet program.

# Chapter 29. Supplier Portal Profiles

## Editing Your Basic Profile (Sponsor Task)

You can update your basic sponsor profile in Sterling Supplier Portal.

## Modifying Your Public Profile (Sponsor Task)

You can manage the information you want to make public in your Sterling Supplier Portal profile. The public information is visible to users when they search for your profile.

# Chapter 30. Reports

## View the Response Activity Report (Sponsor Task)

You can view the response activity report, which is a read-only report containing a record of the steps pertaining to a program. The report also contains information about the user who viewed the step first and the user who completed the step, as well as the corresponding timestamps.

### About this task

To view the response activity report, follow these steps:

### Procedure

1. From the menu bar, navigate to **Setup** > **Configure My Profile**.
2. The My Profile screen is displayed. Click **View Agreements**.
3. The Agreement Search screen is displayed. Enter the search criteria, and click **Search**.
4. The Listing panel containing a list of agreements is displayed. Select the check box for the agreement ID whose details you want to view, and click **View Details**. Alternatively, click the **Agreement ID** hyperlink.
5. The Agreement Detail screen is displayed. Click **View Response Activity**.
6. The Response Activity screen is displayed.

   The Response Activity screen has the following panels:
   - Invitee Details
   - Response Activity

   The following table describes the fields in the Invitee Details panel of the Response Activity screen.

| Field | Description |
|---|---|
| Campaign Name | Indicates the name of the campaign. |
| Status | Indicates the status of the invitee for the campaign. |
| Program Name | Indicates the name of the program. |
| Partner ID | Indicates the identifier of the partner. |
| Partner Name | Indicates the name of the partner. |
| Contact Email ID | Indicates the email ID of the contact. |

The following table describes the fields in the Response Activity panel of the Response Activity screen.

| Field | Description |
|---|---|
| Step # | Indicates the number of the step. |
| Step Name | Indicates the name of the step. |
| Step Type | Indicates the type of the step. |
| First Viewed By | Indicates the identifier and the name of the user who viewed the step first. |
| First Viewed On | Indicates the date and time on which the step was first viewed. |

| Field | Description |
|---|---|
| Completed By | Indicates the identifier and the name of the user who completed the step. |
| Completed On | Indicates the date and time on which the step was completed. |

**Note:** If either a partner or an invitation is deleted, the response activity report for the corresponding partner or invitation will not be displayed.

# View the Form Activity Summary Report (Sponsor Task)

The Form Activity Summary report provides information about the total number and percentage of transactions carried out with a partner using a specific document, such as a purchase order, advance ship notice, or invoice.

## About this task

To view a Form Activity Report, follow these steps:

## Procedure

1. From the menu bar, navigate to **Reports > Form Activity Report**.
2. The Report Criteria panel is displayed. Enter the relevant report criteria and click **Generate**.

   The following table describes the fields in the Report Criteria panel.

| Field | Description |
|---|---|
| Partner ID | Enter the identifier of the Partner for whom you want to generate the report. <br><br> You can also click the **search** icon to select the ID. |
| From Date | Enter the date range for which you want to generate the report. <br><br> You can also click the **calendar** icon to select a date. |
| Community ID | Enter the identifier of the community for which you want to generate the report. |

The Form Activity Detail Report screen is displayed:



The following table describes the fields in the Form Activity Detail screen.

| Field | Description |
|---|---|
| Partner | The partner for whom the report is generated. |
| Form Type | The unique number that identifies the document type. |
| Count | The total number of the specific document. |
| % of Total | The percentage of a document type taken into account. |

**Note:**

- You can save the report in CSV format by copying and pasting data from the report into a spreadsheet.
- The report displays data up to 390 days from the current date.

## View the Aged Unread Report (Sponsor Task)

The Aged Unread Report provides information about the duration for which inbound documents, such as PO, Change PO, and Payment, have been in Unread status for a particular partner.

### About this task

To view an Aged Unread Report, follow these steps:

### Procedure

1. From the menu bar, navigate to **Reports** > **Aged Unread Report**.
2. The Report Criteria panel is displayed. Enter the relevant report criteria and click **Generate**.

   The following table describes the fields in the Report Criteria panel.

   | Field | Description |
   |-------|-------------|
   | Partner ID | Enter the identifier of the partner for whom you want to generate the report. <br><br> You can also click the **Search** icon to select the ID. |
   | Community ID | Enter the identifier of the community for which you want to generate the report. |

   The Aged Unread Detail screen is displayed.

   

   The following table describes the fields in the Aged Unread Detail screen.

   | Field | Description |
   |-------|-------------|
   | Partner | The partner for whom the report is generated. |
   | Form Type | The unique number that identifies the document type. |
   | Age | The duration for which inbound documents such as PO, Change PO, and Payment have been in Unread status. |

   **Note:**

   - You can save the report in CSV format by copying and pasting data from the report in a spreadsheet.
   - The report displays data up to 390 days from the current date.

## View the Mail Box Summary Report (Sponsor Task)

The Mail Box Summary Report contains information about the status (Read or Unread) of all the documents sent and received by you for a particular partner.

## About this task

To view a Mail Box Summary Report, follow these steps:

## Procedure

1. From the menu bar, navigate to **Reports** > **Mail Box Summary**.
2. The Report Criteria panel is displayed. Enter the relevant report criteria and click **Generate**.

   The following table describes the fields in the Report Criteria panel.

| Field | Description |
|---|---|
| Partner ID | Enter the identifier of the partner for whom you want to generate the report.<br><br>You can also click the **search** icon to select the ID. |
| Inbox/Outbox | Select an option from the list. |
| From Date | Enter the date range for which you want to generate the report.<br><br>You can also click the **calendar** icon to select a date. |
| Community ID | Enter the identifier of the community for which you want to generate the report. |

The Mail Box Summary Detail screen is displayed.



The following table describes the fields in the Mail Box Summary Detail screen.

| Field | Description |
|---|---|
| Partner | The partner for whom the report is generated. |
| Inbox/Outbox | Inbox - Contains the summary of all the documents received by the supplier (or sent by you).<br><br>Outbox - Contains the summary of all the documents sent by the supplier (or received by you). |
| Form Type | The unique number that identifies the document type. |
| Form Name | The name of the document type. |
| Status | The current status of the document. |
| Date | The date on which the specific document transaction was made. |

**Note:**

- Inbox contains all the documents that a supplier receives, and Outbox contains all the documents that a supplier sends to you.

- You can save the report in CSV format by copying and pasting data from the report into a spreadsheet.
- The report displays data up to 390 days from the current date.

# View the Interface Summary Report (Sponsor Task)

You can view the interface summary report that provides summary level information about data received from or sent to external applications during a specific period, arranged by processing date of the document.

## About this task

The interface summary information is displayed as a table and a chart. This report enables you to view the number of documents processed for the selected time period, the percentage of documents that failed processing, and related errors.

To view the interface summary report, follow these steps:

## Procedure

1. From the menu bar, navigate to **Reports** > **View Interface Summary**.

   The View Interface Summary screen is displayed. By default, this screen displays interface summary information for the documents that were processed in the past seven days.

   The following table describes the fields in the Filter Criteria panel of the View Interface Summary screen.

| Field | Description |
|---|---|
| Period | Select the time period for which you want to the view the interface summary information: |
| | • Last 7 days: This is the default option. Select to view the interface summary details of all the documents that were processed over the past seven days. |
| | • Last 31 days: View the interface summary information of all the documents that were processed over the past 31 days. |
| | • Last 91 days: View the interface summary information of all the documents that were processed over the past 91 days. |
| | • Last 181 days: View the interface summary information of all the documents that were processed over the past 181 days. |
| Select All | Selects all documents. |

| Field | Description |
|---|---|
| &lt;Document Type&gt; | Select the documents whose interface summary you want to view.<br><br>The following documents are displayed:<br>• Create Order<br>• Change Order<br>• Acknowledgment<br>• Re-acknowledgment<br>• Shipment<br>• Invoice<br>• Payment<br>• Inventory<br>• Routing Request<br>• Routing Response<br><br>**Note:** When a document is received in the context of payment, it refers to a single interface message, which may contain more than one logical transaction within it. |

The following table describes the fields in the Interface Summary - Chart panel of the View Interface Summary screen:

| Field | Description |
|---|---|
| Date | Indicates the date on which the document was processed. |
| Error Percent | Indicates the percentage of documents that failed processing.<br>**Note:** The documents that failed processing includes both the incoming and outgoing documents, even though outgoing documents do not fail.<br><br>For each document, the graph displays the percentage that failed processing on a particular date, which is plotted as a data point in the graph. |
|  |  |

The following table describes the fields in the Interface Summary - Data panel of the View Interface Summary screen:

| Field | Description |
|---|---|
| Date | Indicates the date on which the document was processed. |
| Document | Indicates the document that was processed within the selected time period.<br><br>Click the hyperlink for the error that occurred in the document to view the Error Summary screen. |
| Attempted | Indicates the total number of documents that were processed on a specific day. |
| Passed | Indicates the number of documents that were processed successfully.<br>**Note:** The documents sent by partners (Acknowledgment, Advance Shipment Notice, Invoice, and Inventory) are always displayed as passed. |
| Failed | Indicates the number of documents that failed processing. |
| % Failed | Indicates the percentage of documents that failed processing. |

2. In the Filter Criteria panel of the View Interface Summary screen, perform the following steps:

   a. From the **Period** list, select the number of days (in the past), for which you want to view interface summary information.

      **Note:** When you select 181 days from the **Period** list, you cannot select more than three documents for which to view the corresponding interface summary.

   b. From the list of documents displayed, select the documents for which you want to view interface summary information. To select all documents, select the **Select All** check box.

   c. Click **Apply**.

   The Interface Summary - Chart and Interface Summary - Data panels in the View Interface Summary screen are refreshed, and display interface summary information for the documents you specified, sorted by document processing date.

## View the Error Summary Report (Sponsor Task)

You can view the error summary report of a specific document processed for the selected time period. You can view the percentage of documents that were processed successfully, the number of documents that failed processing, and the detailed explanation of the error that occurred when the document was being processed.

### About this task

To view the error summary report, follow these steps:

### Procedure

1. From the menu bar, navigate to **Reports** > **View Interface Summary**.

   The View Interface Summary screen is displayed. By default, this screen displays interface summary information pertaining to the documents that were processed over the past seven days.

   The following table describes the fields in the Filter Criteria panel of the View Interface Summary screen:

| Field | Description |
|---|---|
| Period | Select the time period from the following options for which you want to the view the interface summary information: <br><br>• Last 7 days: This is the default option. Select to view the interface summary details of all the documents that were processed over the past seven days. <br><br>• Last 31 days: Select to view the interface summary information of all the documents that were processed over the past 31 days. <br><br>• Last 91 days: Select to view the interface summary information of all the documents that were processed over the past 91 days. <br><br>• Last 181 days: Select to view the interface summary information of all the documents that were processed over the past 181 days. |
| Select All | Select this check box to select all the documents for which you want to view the interface summary details. |

| Field | Description |
|---|---|
| \<Document Type\> | Select the check boxes for the documents whose interface summary you want to view.<br><br>The following documents are displayed:<br>• Create Order<br>• Change Order<br>• Acknowledgment<br>• Re-acknowledgment<br>• Shipment<br>• Invoice<br>• Payment<br>• Inventory<br>• Routing Request<br>• Routing Response<br><br>**Note:** When a document is received in the context of payment, it refers to a single interface message, which may contain more than one logical transaction within it. |

The following table describes the fields in the Interface Summary - Chart panel of the View Interface Summary screen:

| Field | Description |
|---|---|
| Date | Indicates the date on which the document was processed. |
| Error Percent | Indicates the percentage of documents that failed processing.<br>**Note:** The percentage of documents that failed processing includes both the incoming and outgoing documents even though outgoing documents never fail. |

For each document, the graph displays:
• the number of documents that were processed within the specified time period.
• the percentage that failed processing on a particular date, which is plotted as a data point in the graph.

The following table describes the fields in the Interface Summary - Data panel of the View Interface Summary screen:

| Field | Description |
|---|---|
| Date | Indicates the date on which the document was processed. |
| Document | Indicates the document that was processed within the selected time period.<br><br>Click the hyperlink corresponding to the error that occurred in the document to view the Error Summary screen. |
| Attempted | Indicates the total number of documents that were processed on a specific day. |
| Passed | Indicates the number of documents that were processed successfully.<br>**Note:** The documents sent by partners (Acknowledgment, Re-acknowledgment, Advance Shipment Notice, Invoice, and Inventory) are always displayed as passed. |
| Failed | Indicates the number of documents that failed processing. |

| Field | Description |
| --- | --- |
| % Failed | Indicates the percentage of the number of documents that failed processing. |

2. In the Filter Criteria panel of the View Interface Summary screen, perform the following steps:

   a. From the **Period** list, select the number of days (in the past), for which you want to view interface summary information.

      **Note:** When you select 181 days from the **Period** list, you cannot select more than three documents from which to view the corresponding interface summary.

   b. From the list of documents displayed, select the check boxes for the documents for which you want to view interface summary information. To select all the documents, select the **Select All** check box.

   c. Click **Apply**.

3. In the Interface Summary - Data panel of the View Interface Summary screen, click the hyperlink corresponding to the document for which you want to view the error summary on the day it was processed.

   The Error Summary screen is displayed.

   The following table describes the fields in the Error Summary panel of the Error Summary screen:

| Field | Description |
| --- | --- |
| Summary for Document<br><br>\<document_name> for<br><br>date \<date> | Indicates the document that was processed, and the date on which it was processed. |
| Passed | Indicates the number and percentage of documents that were processed successfully.<br>**Note:** The documents sent by partners (Acknowledgment, Re-acknowledgment, Advance Shipment Notice, Invoice, and Inventory) are always displayed as passed. |
| Failed | Indicates the number and percentage of documents that failed processing. |
| Total | Indicates the total number of documents that were processed. |

The following table describes the fields in the Error Code List panel of the Error Summary screen:

| Field | Description |
| --- | --- |
| Error | Indicates the error code and provides a short description of the error that occurred when the document was being processed. |
| Explanation | Indicates the detailed explanation of the error that occurred when the document was being processed. |
| Failed | Indicates the number of documents that failed processing because of the error. Click the hyperlink corresponding to the number of documents to view the corresponding Find Interface Error screen. |

# View the Interface Error Details Report (Sponsor Task)

You can view the interface error details report that enables you to view the details of each error. You can find errors based on date, document type, error code, or one of the document-specific reference fields.

## About this task

To view the interface error details report, follow these steps:

## Procedure

1. From the menu bar, navigate to **Reports** > **Find Interface Error**.

   The Find Interface Error screen is displayed.

   The following table describes the fields in the Search Criteria panel of the Find Interface Error screen:

| Action | Description |
|---|---|
| Saved Searches | Click to save the current search criteria as a favorite search. |
| Save this Search | Click to search for a saved search in order to execute it. |

| Field | Description |
|---|---|
| Error Code | Enter the identifier of the error you want to search.<br>**Note:** There are certain errors that are reprocessed. If such errors occur when processing a document, the status of the document is always displayed as Passed until it has been reprocessed for four times. However, if the document fails at the time of reprocessing, the status is displayed as Failed. The document gets reprocessed at an interval of six hours.<br><br>The following error codes have been configured as reprocessed:<br>• YFS10003<br>• YFS10240<br>• YFS10242<br>• YFS10408<br>• YFS10481<br>• YFS10491<br>• YWE0011<br>• YWE0013<br>• YWE0014<br>• YWE0065<br>• YWE0087<br>• YWE00135<br>• YWE00142<br>• YWE00143<br>• YWE00144<br>• YWE00145<br>• YWE0507<br>• YWE0508<br>• YWE0509<br>• YWE0510<br>• YDM00208<br>• YFS10137<br>• YWE0080<br>• YWE0092 |
| Date | Enter the date and time range within which you want to search for the error.<br><br>You can also click ⊞ to select a date.<br><br>You can also click 🕐 to select a time. |
| Partner ID | Enter the identifier of the partner (supplier) to whom the document was sent.<br><br>You can also click 🔍 to search for a Partner ID. In the dialog box that is displayed, you can enter the partner's name in the **Partner Name** box to search for a Partner ID. |

| Field | Description |
|---|---|
| Reference | Indicates an additional attribute that is associated with a document that was processed.<br><br>From the list, select one of the following reference attributes:<br>• Community ID<br>• Invoice #<br>• Order #<br><br>In the adjacent text box, enter the value of the attribute associated with the error that you want to view. |
| <Document Type> | Select the documents for which you want to view error details.<br><br>To select all documents, use the **Select All** check box. |

2. In the Search Criteria panel of the Find Interface Error screen, enter the search criteria and click **Search**.

   The search results matching the search criteria entered are displayed in the Listing panel.

   The following table describes the fields in the Listing panel of the Find Interface Error screen:

| Action | Description |
|---|---|
| View Details | Click this to view the details of the selected error. The Error Details screen is displayed, which enables you to view error details such as the error identifier, error that occurred, and the input that was processed. |

| Field | Description |
|---|---|
| Error ID | Indicates the identifier for an instance of the error. For example, when multiple Create Order documents are processed, the error corresponding to the code YDB100123 may occur 15 times for the same document type. **Error ID** displays the identifier for every instance of the error. |
| Document | Indicates the document in which the error occurred. |
| Partner ID | Indicates the identifier of the Partner (Supplier) to whom the document was sent. |
| Date | Indicates the date and time at which the error occurred. |

| Field | Description |
|---|---|
| Error Code | Indicates the identifier of the error that occurred while processing the document.<br>**Note:** There are certain errors that are reprocessed. If such errors occur when processing a document, the status of the document is always displayed as Passed until it has been reprocessed for four times. However, if the document fails at the time of reprocessing, the status is displayed as Failed. The document gets reprocessed at an interval of six hours.<br><br>The following error codes have been configured as reprocessed:<br>• YFS10003<br>• YFS10240<br>• YFS10242<br>• YFS10408<br>• YFS10481<br>• YFS10491<br>• YWE0011<br>• YWE0013<br>• YWE0014<br>• YWE0065<br>• YWE0087<br>• YWE00135<br>• YWE00142<br>• YWE00143<br>• YWE00144<br>• YWE00145<br>• YWE0507<br>• YWE0508<br>• YWE0509<br>• YWE0510<br>• YDM00208<br>• YFS10137<br>• YWE0080<br>• YWE0092 |
| Reference(s) | Indicates the additional attribute associated with a failed document. |

3. In the Error ID column, click the **Error ID** hyperlink corresponding to the error whose details you want to view.

   The Error Details screen is displayed with the details of the error.

   **Note:** The Error Details screen displays the details of the documents that have been processed in the last 41 days only.

   Alternatively, you can navigate to the Find Interface Error screen from the Error Summary screen. Click the number of the hyperlink that corresponds to the error whose details you want to view. The Listing panel is displayed in the Find Interface Error screen.

   The following table describes the fields in the Error panel of the Error Details screen:

| Field | Description |
|---|---|
| Error ID | Indicates the identifier for an instance of the error. For example, when multiple Create Order documents are processed, the error corresponding to the code YDB100123 may occur 15 times for the same document type. Error ID displays the identifier for every instance of the error. |
| Error Code | Indicates the identifier of the error that occurred while processing the document.<br>**Note:** There are certain errors that are reprocessed. If such errors occur when processing a document, the status of the document is always displayed as Passed until it has been reprocessed for four times. However, if the document fails at the time of reprocessing, the status is displayed as Failed. The document gets reprocessed at an interval of six hours.<br><br>The following error codes have been configured as reprocessed:<br>• YFS10003<br>• YFS10240<br>• YFS10242<br>• YFS10408<br>• YFS10481<br>• YFS10491<br>• YWE0011<br>• YWE0013<br>• YWE0014<br>• YWE0065<br>• YWE0087<br>• YWE00135<br>• YWE00142<br>• YWE00143<br>• YWE00144<br>• YWE00145<br>• YWE0507<br>• YWE0508<br>• YWE0509<br>• YWE0510<br>• YDM00208<br>• YFS10137<br>• YWE0080<br>• YWE0092 |
| Error Description | Indicates a short description of the error. |
| Date | Indicates the date on which the error occurred. |
| Partner ID | Indicates the identifier of the partner (supplier) to whom the document was sent. |
| Reference(s) | Indicates the additional attribute associated with a failed document. |
| Explanation | Indicates a detailed description of the error. |

The Input XML panel of the Error Details screen indicates the input data of the failed document processed by Sterling Supplier Portal. The following table describes the fields in the Input XML panel:

| Field | Description |
|---|---|
| Copy Stack Trace to Clipboard | Copies the stack trace of the error from the Sterling as a Service Application to a Windows clipboard. |

# Chapter 31. Ship From Locations

## New Ship From Locations

You can configure the ship from locations that your partners can use in Sterling Supplier Portal.

This process helps to prevent errors when you receive an Advance Shipment Notification (ASN) from your partners. Your partners can also define their own versions of the ship from locations.

When you create a community, select one of the following options for the ship from locations:

**any location**

> If you select this option, your partner can ship orders from any location. By default, this rule is selected.

**supplier created locations approved by you**

> If you select this option, your partner can only ship orders from the locations that you approve as the sponsor.

> When your partners create shipments, they can view a list of the approved ship from locations. If the approved list of ship from locations is not available, your partners will not be able to send an ASN.

**locations specified by you**

> If you select this option, your partner can only ship orders from locations that you uploaded as the sponsor.

> When your partners create shipments, they can view the list of ship from locations that you uploaded.

> The partner cannot add or modify the ship from locations. If partners make any changes to their ship from locations or add a new ship from location, they must request that you upload the location data.

### Changing the Ship From Location Option

You can modify a community and change the ship from location option. This change affects the following workflow for resending existing shipments:

1. You modify the community to change the ship from location from **any location** to **supplier created locations approved by you** or **locations specified by you**.
2. Your partner wants to resend an existing shipment that was created before you modified the community.
3. The partner will have to cancel the original shipment and send you a new shipment. The partner cannot use the Resend Shipment feature to submit the shipment.

**Related tasks**:

Sterling Supplier Portal enables you to configure new ship from locations.

You can upload a list of ship from locations that can your partners can use.

# Configure New Ship From Locations (Sponsor Task)

Sterling Supplier Portal enables you to configure new ship from locations.

## About this task

To configure the new ship from location details, perform the following steps:

## Procedure

1. From the menu bar, navigate to **Setup** > **View Partner Info**.
2. The Search Criteria - Find Supplier panel is displayed. Enter the appropriate search criteria and click **Search**.
3. Suppliers matching the search criteria are listed in the Search List panel. From the list of partners displayed, select the partner for whom you want to add the ship from location details and click **Configure New Ship From Location**.
4. The New Ship From Locations screen is displayed with the partner and the sponsor ship from location details. To create your version of the ship from location for the corresponding partner version of the ship from location, enter the new location ID, name, address, contact numbers, and supplier ID of the new company from which you want to ship the order and click **Save All**. To make the sponsor version of the ship from location details same as that of the partner version, click the **Same as Partner's Version** check box.

**Related concepts**:

"New Ship From Locations" on page 103
You can configure the ship from locations that your partners can use in Sterling Supplier Portal.

# Upload Ship From Locations (Sponsor Task)

You can upload a list of ship from locations that can your partners can use.

## About this task

You can upload the ship from location details in a specific format, which is provided in the sample file. You must first download the sample file, add the required ship from location details, and then upload the file.

The partner can view your uploaded ship from locations on the Configure Ship From Location page.

## Procedure

To upload the ship from location details, perform the following steps:

1. From the menu bar, click **Setup** > **Upload Ship From Locations**. The Upload Ship From Locations page is displayed.
2. Click the **Download Sample** link to download the spreadsheet and save the file on your computer.
3. Edit the spreadsheet and enter the following details:

| Field | Description |
|---|---|
| Partner ID | Enter the identifier of the partner. This field is required. |
| Location ID | Enter the location ID of the location from where the order is shipped. This field is required. |

| Field | Description |
|---|---|
| Company | Enter the name of the company that is shipping the order. |
| Supplier ID | Enter the identifier of the company that is shipping the order. |
| First Name | Enter the given name (first name) of the contact person. |
| Last Name | Enter the family name (last name) of the contact person. |
| Address Line 1 | Enter the first line of the location address. This field is required. |
| Address Line 2 | Enter the second line of the address, if applicable. |
| City | Enter the city of the location. This field is required. |
| State | Enter the state or province of the location. This field is required. |
| Zip Code | Enter the postal code of the location. This field is required. |
| Country | Enter the country or region of the location. This field is required. |
| Phone | Enter the telephone number of the contact person. |
| Email | Enter the email address of the contact person. |

4. Save the updated spreadsheet.
5. Click **Browse**, select the file, and click **Upload** to import the spreadsheet into Sterling Supplier Portal.

**Related concepts**:

"New Ship From Locations" on page 103
You can configure the ship from locations that your partners can use in Sterling Supplier Portal.

# Chapter 32. Business Calendar

Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

The date-based tasks refer to the business calendar. Tasks are raised based on the working days that have been defined in this business calendar, and ignores non-working days. If a task is raised on a non-working day, the task will be generated on the next working day instead.

For example: In the business calendar, you specify Sunday as a non-working day and Monday as a working day. A task is configured to be generated on Sunday, but because Sunday is a non-working day, the task generation day will be incremented so that the task is generated on Monday.

If the task is configured to be generated after a given number of days, and a non-working day occurs within the configured number of days, the task will be generated on the next working day, ignoring the non-working days.

For example: in the business calendar, you specify Saturday and Sunday as non-working days and the rest of the weekdays as working days. A task is configured to be generated two days after Friday. The task will ignore the two non-working days (Saturday and Sunday) and be generated on Tuesday.

**Note:**

- All tasks are either based on the number of days or the number of hours that signify within which duration the task should be completed. If the current day is a non-working day, the due date for the task is postponed to the next business day.

  Tasks such as Order Not Read/Change Order Not Read are based on the number of hours configured in community configuration. If an order is received on a non-working day, task generation begins on the next business day. If the date on which a task has to be completed falls on a day that is preceded by a non-working day, the system assumes that the task must be completed on the same day.

- Documents that were processed prior to the creation of the business calendar are not evaluated again against the business calendar for raising the associated task.

- If you modify the business calendar, modifications are applicable to new tasks being generated. Existing Task dates remain as they were. However, the business rule validation is performed based on the latest calendar configuration.

- If you have not configured and saved a business calendar, the default calendar defined for your organization is used. In the default calendar, every day is a working day. Non-working days are not defined.

**Related tasks**:

"Configure Business Calendar (Sponsor Task)" on page 108
You can configure the business calendar by defining working days, and adding, modifying, or deleting non-working dates.

"Defining Working Days" on page 108
You can define valid working days for a week in the Configure Business Calendar

screen.

"Adding a Non-Working Date" on page 109
You can add non-working dates to the business calendar by using the Configure Business Calendar screen.

"Modifying a Non-Working Date" on page 109
You can modify non-working dates in the business calendar by using the Configure Business Calendar screen.

"Deleting a Non-Working Date" on page 110
You can delete non-working dates in the business calendar by using the Configure Business Calendar screen.

# Configure Business Calendar (Sponsor Task)

You can configure the business calendar by defining working days, and adding, modifying, or deleting non-working dates.

### About this task

To configure the Business Calendar, follow these steps.

### Procedure

1. Log in to Sterling Supplier Portal as a Sponsor.
2. The Dashboard screen is displayed. From the menu bar, select **Setup > Configure Business Calendar**.
3. The Configure Business Calendar screen is displayed. You can perform the following actions in the Configure Business Calendar screen:
   - Defining Working Days
   - Adding a Non-Working Date
   - Modifying a Non-Working Date
   - Deleting a Non-Working Date

| Action | Description |
|--------|-------------|
| Save | Click this action to save the business calendar. |
| Delete | Click this action to delete the selected non-working date. |

**Related concepts**:

Chapter 32, "Business Calendar," on page 107
Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

# Defining Working Days

You can define valid working days for a week in the Configure Business Calendar screen.

### About this task

To define a valid working day of a week, follow these steps:

**Procedure**

1. Log in to Sterling Supplier Portal as a sponsor.
2. The Dashboard screen is displayed. From the menu bar, select **Setup** > **Configure Business Calendar**.
3. The Configure Business Calendar screen is displayed. In the Working Days panel, select the check box corresponding to the day you want to specify as a valid working day of a week.

   Days corresponding to the unselected check boxes are considered as non-working days of the week.

**Related concepts**:

Chapter 32, "Business Calendar," on page 107
Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

## Adding a Non-Working Date

You can add non-working dates to the business calendar by using the Configure Business Calendar screen.

### About this task

To add a non-working date, follow these steps:

### Procedure

1. Log in to Sterling Supplier Portal as a sponsor.
2. The Dashboard screen is displayed. From the menu bar, select **Setup** > **Configure Business Calendar**.
3. The Configure Business Calendar screen is displayed. In the Non-Working Dates panel, click the **add** icon. A new row is added at the bottom of this panel.

   You can also enter the required number of new rows in the text box, and click the **add** icon. New rows corresponding to the number you entered are added at the bottom of this panel.
4. Enter the date that you want to declare as a non-working date in the locale-specific date format defined for your organization.

   You can also click the Calendar lookup icon and select a date from the Calendar pop-up window.
5. Click **Save**.

   By default, non-working dates are listed in ascending order.

**Related concepts**:

Chapter 32, "Business Calendar," on page 107
Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

## Modifying a Non-Working Date

You can modify non-working dates in the business calendar by using the Configure Business Calendar screen.

### About this task

To modify a non-working date, follow these steps:

### Procedure

1. Log in to Sterling Supplier Portal as a sponsor.
2. The Dashboard screen is displayed. From the menu bar, select **Setup** > **Configure Business Calendar**.
3. The Configure Business Calendar screen is displayed. Click the field corresponding to the non-working date that you want to modify, and enter the new date that you want to specify as a non-working date in the locale-specific date format defined for your organization.

    You can also click the Calendar lookup icon and select a new date from the Calendar pop-up window.
4. Click **Save**.

**Related concepts**:

Chapter 32, "Business Calendar," on page 107
Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

## Deleting a Non-Working Date

You can delete non-working dates in the business calendar by using the Configure Business Calendar screen.

### About this task

To delete a non-working date, follow these steps:

### Procedure

1. Log in to Sterling Supplier Portal as a sponsor.
2. The Dashboard screen is displayed. From the menu bar, select **Setup** > **Configure Business Calendar**.
3. The Configure Business Calendar screen is displayed. Select the check box for to the non-working date you want to delete.
4. Click **Delete**.

**Related concepts**:

Chapter 32, "Business Calendar," on page 107
Sterling Supplier Portal enables you to configure a business calendar for your organization, and specify non-working days such as holidays and special events. This calendar is used during the generation of the Next Tasks or Overdue Tasks and business rule validation for all of the partners across communities.

# Chapter 33. Delete Programs (Sponsor Task)

Sterling Supplier Portal enables you to delete a program.

## About this task

Complete the following steps to delete a program:

## Procedure

1. From the menu bar, navigate to **Design** > **Manage Program**.
2. Enter the appropriate fields in the search criteria and click **Search**. The list of existing programs is displayed.
3. In the Manage Programs screen, select the appropriate program and click **Delete**.

# Chapter 34. Prerequisites to Enable Route Planning (Sponsor Task)

Before you can use the route planing features of Sterling Supplier Portal, you must complete certain prerequisites.

If you want to perform route planning for your partners, you must set up the following configurations:

**Sterling TMS**

Subscribe to the IBM Sterling Transportation Management System. For more information, contact IBM.

**Choreography**

Configure the community that contains these partners. Include **Advance Shipment Notice** (ASN) in the choreography and configure the following fields as displayable and mandatory in the ASN Excel spreadsheet:

- Shipment On
- Weight
- Volume

Configure the SCAC as displayable but not mandatory in the ASN Excel spreadsheet.

**DUNS**

Configure your Data Universal Numbering System (DUNS) number in Customer Center. You can configure your DUNS number when you complete your registration or when you change information about your company.

The DUNS number should be the same as the number you configured in Sterling Transportation Management System.

**Partner ID**

Ensure that the Partner ID that you enter for each partner is the same as the Vendor ID that you configured for that partner in Sterling Transportation Management System.

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