




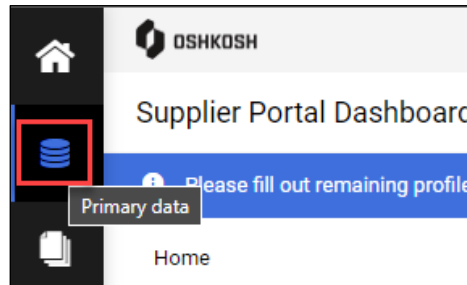
## Adding, Removing, and Editing Contacts

### Purpose

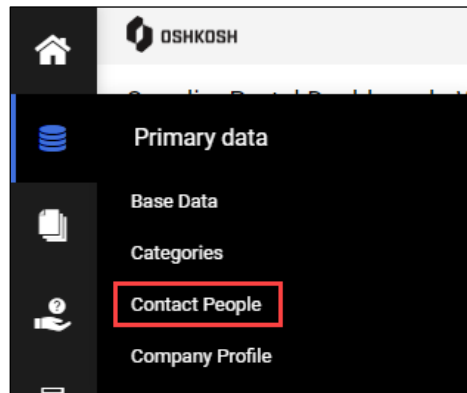
The purpose of this job aid is to walk through the steps of adding additional contacts, removing no-longer valid contacts, as well as a description of the different roles and responsibilities within the Jaggaer portal.




Pages 1-2	Adding, editing, and deleting contacts
Page 3	Assigning/Changing Roles and Responsibilities

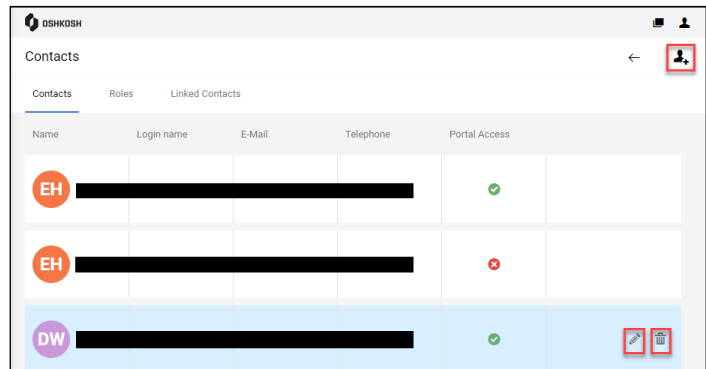
1. Once logged into Jaggaer; select the  icon from the left menu to access Primary data



2. When you click on "Primary Data" four options will appear. Select the third option "Contact People"


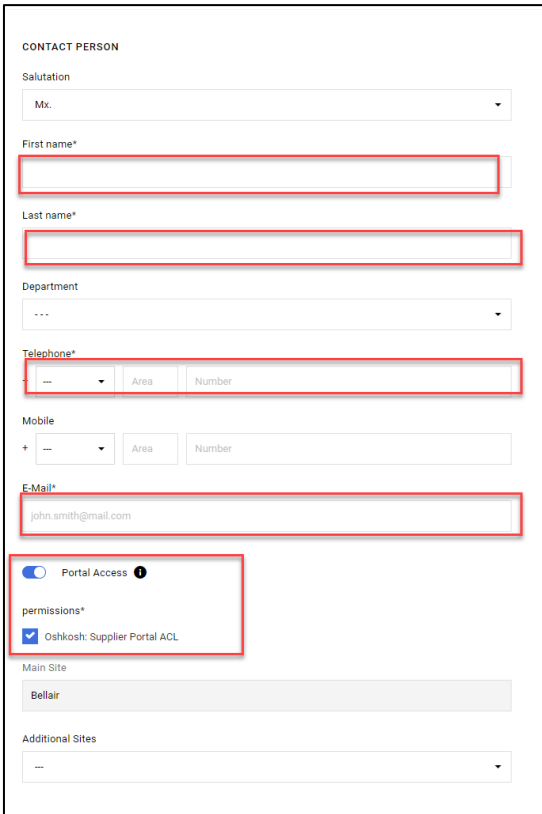

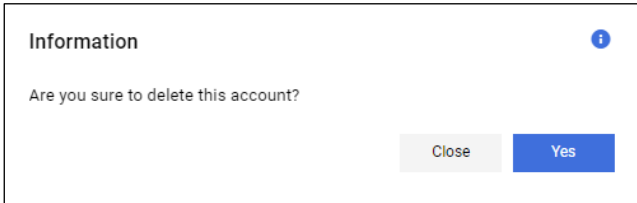


3. You will be brought to the contacts home where you can view, edit, and delete contacts.
  - a. If you want to add a contact, select the  icon in the top right
  - b. If you want to edit a contact (update name, phone, or email) select the  icon on the far right side when hovering over a specific contact
  - c. If you would like to delete a contact, select the  icon on the far right side when hovering over a specific contact






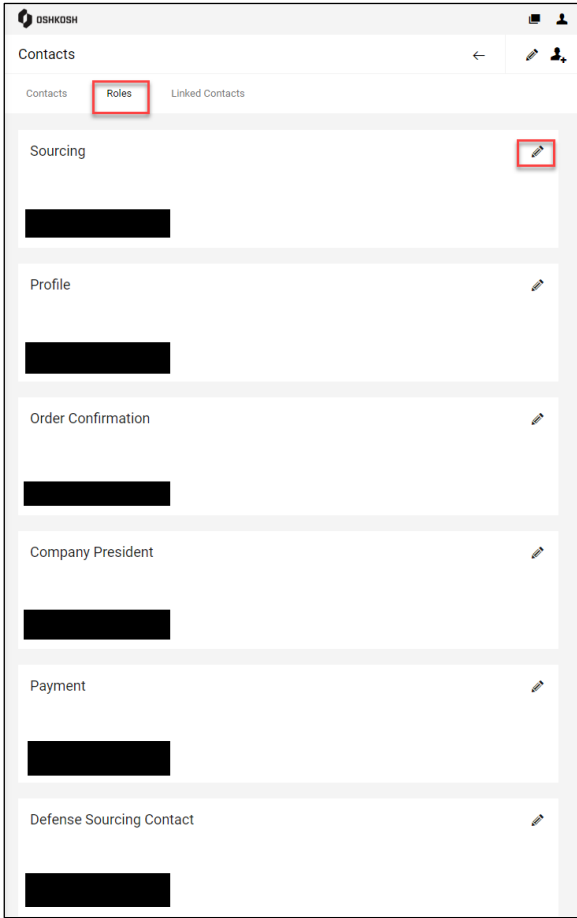


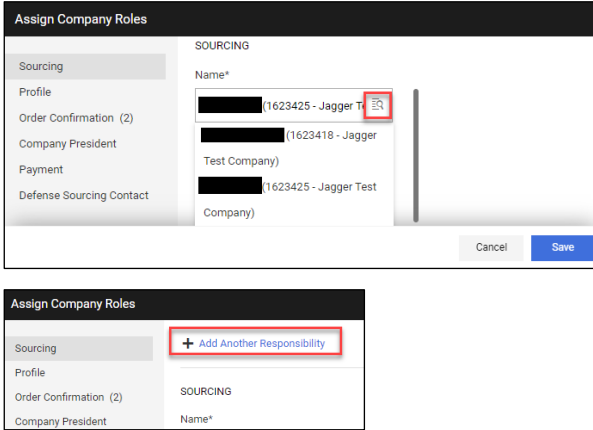
Adding, Removing, and Editing Contacts

<p>4. If Adding contacts; after selecting “add” with the  icon, fill in all of the required fields (marked with *) and click “save”</p> <ol style="list-style-type: none"> <li>If you intend for the contact to be able to access Jaggaer for any reason you must toggle the <b>Portal Access</b> button, it will appear blue, then check the box next to “Oshkosh Supplier Portal ACL”.</li> <li>The email given on this page will be the username for login.</li> </ol>	
<p>5. If deleting a contact, after selecting “delete” with the  icon, you will be prompted with a warning message</p> <ol style="list-style-type: none"> <li></li> </ol>	
<p><b>Note:</b> Editing a contact in this section is limited to name, email, and phone numbers. Roles is covered in next section.</p>	

**Roles and Responsibilities**



## Adding, Removing, and Editing Contacts

<p>1. After you have all of your contacts added, you can assign roles by selecting the second tab from the top menu, below are description of each option</p> <ul style="list-style-type: none"> <li>➤ <b>Sourcing</b> –Answer and respond to any electronic RFQs regardless of segment (<i>multiple contacts</i>)</li> <li>➤ <b>Profile</b> – Maintain and adjust supplier profile for your company (<i>one contact</i>)</li> <li>➤ <b>Order Confirmation</b> – Contact will confirm and change PO’s (<i>multiple contacts</i>)</li> <li>➤ <b>Company President</b> – Name of company president (<i>one contact</i>)</li> <li>➤ <b>Payment</b> – View payments, receipts, &amp; invoices (<i>multiple contacts</i>)</li> <li>➤ <b>Defense Sourcing Contact</b> – Answer and respond to any electronic RFQs for Defense only. Can only be one person but if they are not available will move to main sourcing list of names (<i>one contact</i>)</li> </ul> <p>2. To edit the roles, select the edit  icon next to anyone of the roles</p>	
<p>3. After selecting the , an “assign company roles” window will pop up</p> <ul style="list-style-type: none"> <li>➤ You are able to pick any role and assign from this window</li> <li>➤ Some roles you can assign to multiple while some are restricted to a single user as noted above in blue</li> </ul> <p>4. To assign a person, select the  icon</p> <p>5. If its a role that can be multiple, select add another responsibility to add additional contact</p>	
<p>6. End Job Aid</p>	