

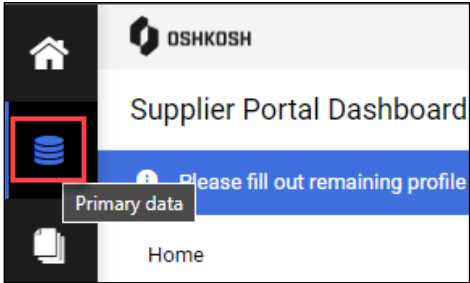
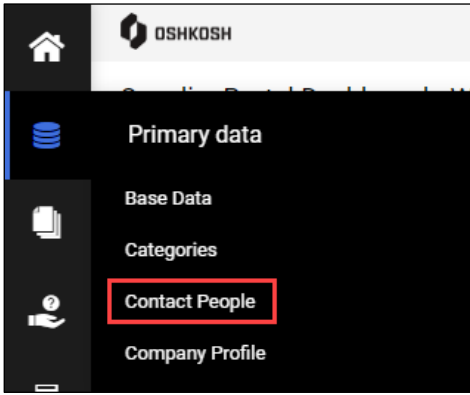
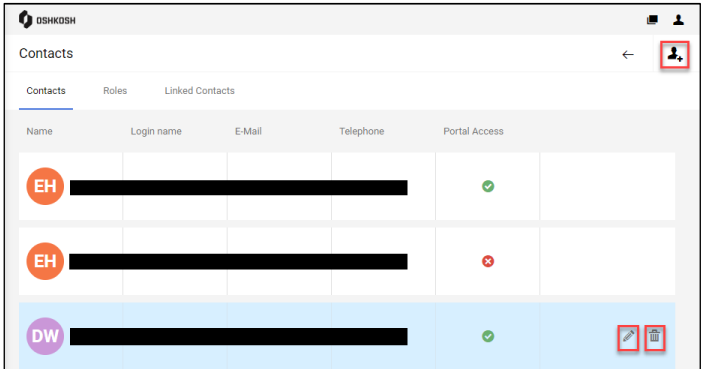


Adding, Removing, and Editing Contacts

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

<p>1. Once logged into Jaggaer; select the icon from the left menu to access Primary data</p>	
<p>2. When you click on “Primary Data” four options will appear. Select the third option “Contact People”</p>	
<p>3. You will be brought to the contacts home where you can view, edit, and delete contacts.</p> <ol style="list-style-type: none"> 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 	



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4. If Adding contacts; after selecting “add” with the  icon, fill in all of the required fields (marked with *) and click “save”
 - a. If you intend for the contact to be able to access Jaggaer for any reason you must toggle the **Portal Access** button, it will appear blue and below a loginname field will appear
 - i. Usernames are unique and as general rule of thumb we recommend using the first part of your email (joe.smith@example.com = joe.smith)

CONTACT PERSON

Salutation
Mx.

First name*
[Red box]

Last name*
[Red box]

Department
...

Telephone*
[Red box]

Mobile
+ [Red box]

E-Mail*
john.smith@mail.com [Red box]


Portal Access ⓘ

Main Site
Jagger Test Company

Additional Sites
...

Portal Access ⓘ

Loginname*
[Red box]

5. If deleting a contact, after selecting “delete” with the  icon, you will be prompted with a warning message
 - a.

Information ⓘ


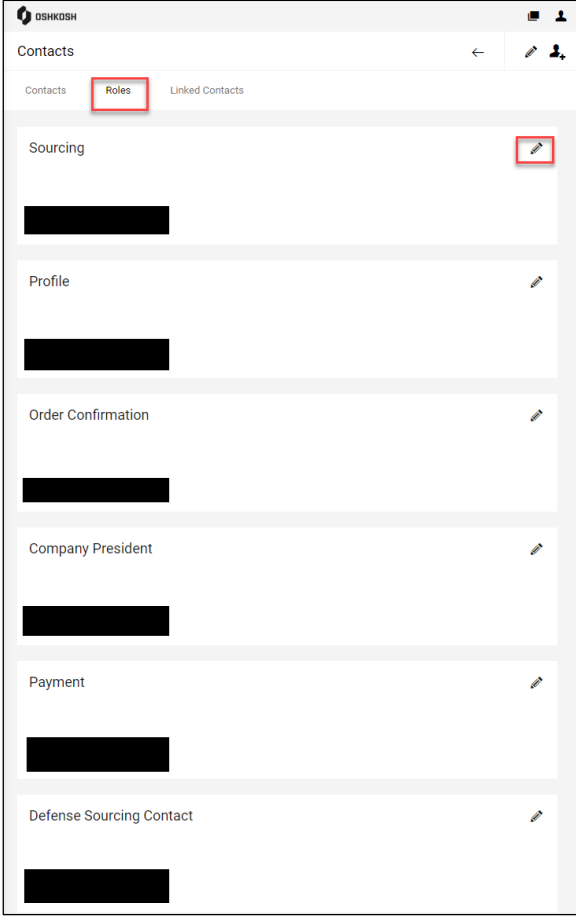


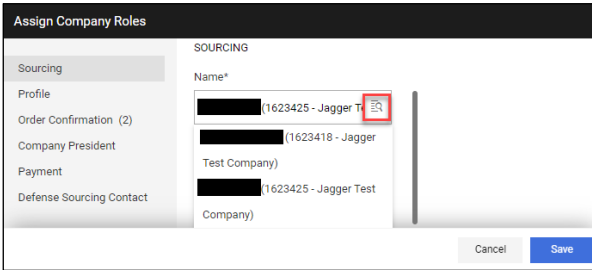
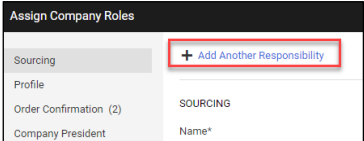
Are you sure to delete this account?

Close Yes

Note: Editing a contact in this section is limited to name, email, and phone numbers. Roles is covered in next section.



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Roles and Responsibilities	
<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"> ➤ Sourcing –Answer and respond to any electronic RFQs regardless of segment (<i>multiple contacts</i>) ➤ Profile – Maintain and adjust supplier profile for your company (<i>one contact</i>) ➤ Order Confirmation – Contact will confirm and change PO's (<i>multiple contacts</i>) ➤ Company President – Name of company president (<i>one contact</i>) ➤ Payment – View payments, receipts, & invoices (<i>multiple contacts</i>) ➤ Defense Sourcing Contact – 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>) <p>2. To edit the roles, select the edit  icon next to anyone of the roles</p>	
<p>3. After selecting the  icon, an “assign company roles” window will pop up</p> <ul style="list-style-type: none"> ➤ You are able to pick any role and assign from this window ➤ Some roles you can assign to multiple while some are restricted to a single user as noted above in blue <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>	