

SRM Profile Changes

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

This job aid covers the following scenarios:

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

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





2. Make changes as needed.		Base Data		€ 1 + See	1
3. Click Save.		General Sites			
 Click Save. Oshkosh will review your bas changes. If corrections are n email will be sent to you. 	e data eeded, an	General Data General Data State St	Kining AMAY DATA AMAY DATA Prays yam? Prays y	Ouck Nerrigation	



Continue here if you Categories.	have been onboarded for	RFQ or PO and need	to make changes	to your
5. Click on Primary Categories.	Data, then select	Image: Series of the series	P 11 1 splier, we welcome you t Please proceed wi Thank you and bes	o our new supplier portal! th your registration. st regards
6. To add categories in the Categories on the right of the categories.	s, check additional boxes Overview. Use the arrow category to view the sub-		Expert 411 Date 44 Expert 411 Date 44 Chowe Parage Attending Para Curring Curri	CONTRACTOR OF CO
7. To deselect categor Selected Categor uncheck boxes.	ories, hover over a y and click the 🟛 icon or		Expert All Case All Belocide Calify Accounty Part Carlos Reiney C Carlos Rein Carlos Rein	ades many see



8. To select a new primary category, click on . . . Sam Choose Primary Category, then click on the appropriate category. 9. Click Save. Continue here if you have been onboarded for RFQ or PO and need to make changes to your Contact Role assignments or add an additional user. 10. Click on Primary Data, then select Contact 🗘 ознкозн People. \sim Primary data Base Data Categories Contact People 2 Company Profile 륩 olier Bank Accounts ome you to our new supp ø Please proceed with your registra Thank you and best regards RFQS No entries found. 11. To add a new user, click on the 4 icon. 3, 2 SS 큠



 12. Fill out all the following mandatory fields: First name Last name Telephone E-Mail Portal Access (Toggle switch to blue) Check Box "Oshkosh Supplier Portal ACL" The email given on this page will be used for login. 13. Click Save. 14. Inform the new user that they will receive an email from Jaggaer with login instructions. 	CONTACT PERSON Salutation Mr. First name* Last name* Department Telechone* Pumber Mobile * - Area Number Mobile * - Area Number Fumber EMail* permisaions* Contact Supplier Portal ACL. Main Site Email* Email*
15. To change role assignments, click on Roles at the top.	Owner E Contacts - <t< td=""></t<>
 16. To update Assigned Roles, click on the <i>icon</i>. <i>Note</i>: Effects of certain roles listed below: <i>Sourcing</i> –Answer and respond to any electronic RFQs regardless of segment <i>Profile</i> – Maintain and adjust supplier profile for your company <i>Order Confirmation</i> – Contact will confirm and change PO's <i>Company President</i> – Name of company president <i>Payment</i> – View payments, receipts, & invoices <i>Defense Sourcing Contact</i> – Answer and respond to any electronic RFQs for Defense only. Can only be one 	Image: Sourcing S



person but if they are not available will move to main sourcing lint of names Note: More than one user must be registered to change assigned role. 17. To change the user assigned to a role, enter the name of the user in the Name field. **Assign Company Roles** 18. Click Save. + Add Another Responsibility Sourcing Profile SOURCING Order Confirmation Name* **Company President** Payment ĒQ Defense Sourcing Contact Cancel Save 19. To assign the role to an additional user, Assign Company Roles click + Add Another Responsibility Note: Not all roles can be assigned to + Add Another Responsibility Sourcing multiple users. Profile 20. Start typing in the Name* field to search for SOURCING Order Confirmation a user, then click to select. Name* Company President 21. Click Save. Payment 3251887 - Price, Austin ΞQ Defense Sourcing Contact 맓 SOURCING Name* ΞQ Cancel Save

Updated: 2/7/23 EJH



Continue here if you have been onboarded for Company Profile.	RFQ or PO and need to make changes to your
22. Click on Primary Data , then select Company Profile .	Image: Service of the ser
 23. Make changes to fields as needed. Before switching tabs, click Save. 24. When changes are made, click Publish. Note: Changes to certain fields on the supplier profile will require Oshkosh approval. 	Contraction Contracti