TUNGSTEN NETWORK

SUPPLIER CONNECT
TRANSFORMING ONBOARDING

Quick Guide
Self serve integration; status dashboard for buyers

Congratulations, your supplier is about to start their self-serve integration implementation, below is a step-by-step guide to your dashboard view of their implementation journey.
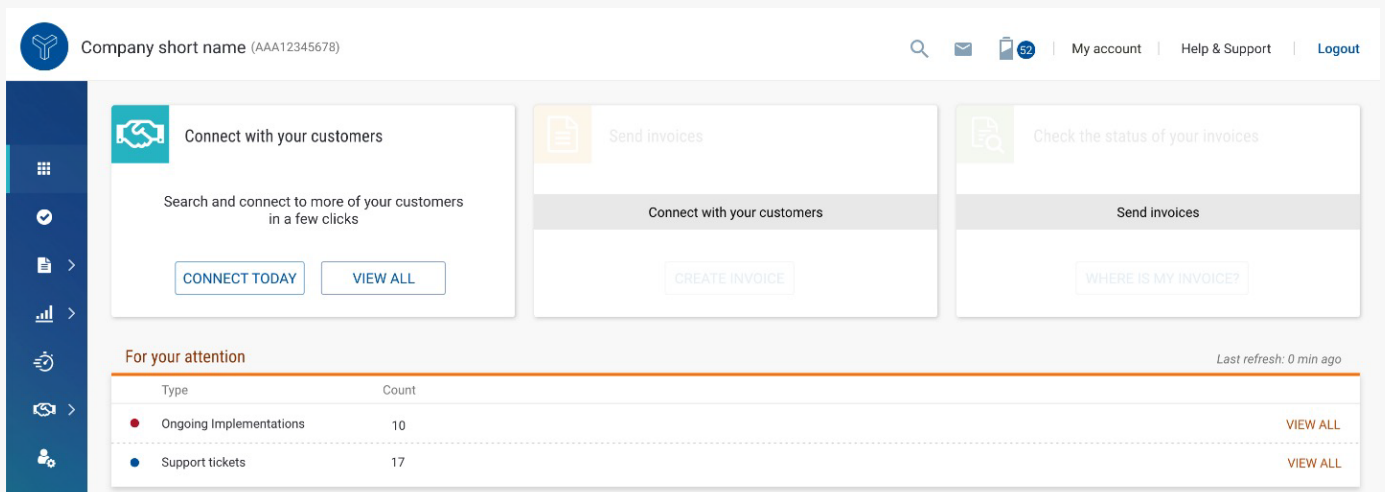
Our best practice integration should take **just 26 days to complete**, the days shown for each activity are below, but suppliers can edit these dates to reflect what is realistic for them, too.

Supplier integration project steps:

1. Complete questionnaire = 5 days from the date on which user landed on 'Onboarding screen'
2. Create test files = 5 days from step 1
3. - Upload test files = 1 day from step 2
   - Test file review by implementation specialist = 2 (imp review) + 2 (for supplier to make any changes needed) + 3 (create sample invoices) + 3 (create mapping) = 10 days from step 3
4. Approve PDFs = 3 days + 3 days [if buyer approval is required] from step 4
5. Go Live (expectation of when first invoice will flow through the system) = 2 days from step 5
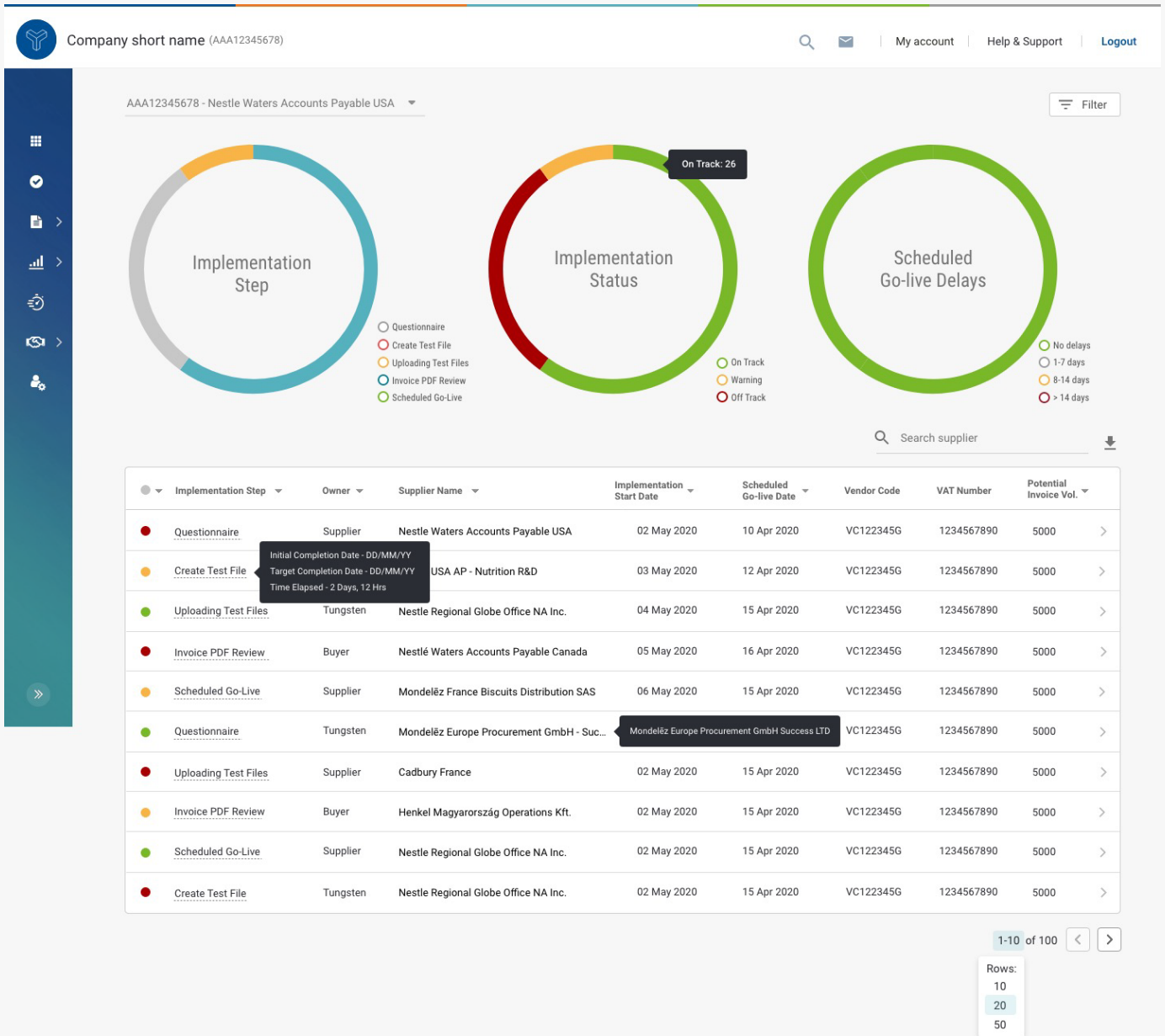
Get started!

1. Login to the portal and navigate to the 'For your attention' list page or visit the 'Suppliers' tab and 'Supplier Onboarding Status' menu.

2. Integration Status Dashboard

Integration dashboard charts show:

- The number of suppliers at each step of their implementation.
- The number and status of implementations – On track, warning, off track.
- The number of scheduled 'go lives which have been delayed and the timescale of these: within the next ½ days, 8/14 days or 14+ days.

N.B. You can click into each pie chart to drill down to suppliers which will populate the list page below.

Integration list page shows:

The full list of suppliers currently in implementation.

- You can filter by any of the headers. Useful filters include Implementation Step
- Hovering over the Implementation step you will see a snapshot of the Initial completion date, the new Target completion, and the number of elapsed days between them.

- If you filter by Owner 'Buyer' this will show any test files scenarios you need to approve. See section 5 for more information. N.B. There shouldn't be any other scenarios that actively require your action.
- You can search for specific suppliers within the search box, too.
- Or download the filtered list view for your own reporting.

3. Supplier Integration Project Overview

Clicking on an individual supplier within the list page will open their record and show you an overview of where they're at in their implementation and their activity log with dates.

Relationships

- The Relationships tab shows each of your buyer entities that the supplier is integrating with.

Contacts

The contacts tab allows you to reach out to the supplier directly to follow up or assist with any delays in their integration project.

4. Test invoice approval

Some buyers play a more active role in implementations than others.

- If you have specified approval of suppliers PDF test files, you'll receive an email notification to review them OR you can filter and find them from the previous list page.
- Once in an individual supplier overview, you'll see the red notification banner. Click here to review.

Example PDF invoice approval email.

- Here you will review, add a comment and approve or reject the files.
- If you reject, a service cloud ticket is raised for our implementation team to resolve the rejection offline between you and your supplier. **N.B.** This step isn't automated just yet, but we're working on it.
- If you accept, the supplier can continue their implementation.

If you have any questions at this stage, you can reach out directly to our implementation team or your Service Delivery Manager.

Email Alerts

You will receive email notifications regarding your suppliers' integration statuses for the following scenarios.

- When a supplier goes live with their integration
- When a supplier lapses a project step – over 7 days
  - N.B. Implementation will get alerts well before the 7-day elapsed time fame and be assisting the supplier with their integration
- Buyer test invoice notification

If you have questions about any step in the integration process or specific supplier projects, email implementation@tungsten-network.com or raise a support ticket for assistance.

For product feedback or suggestions for improvement, email:
product.feedback@tungsten-network.com