

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.

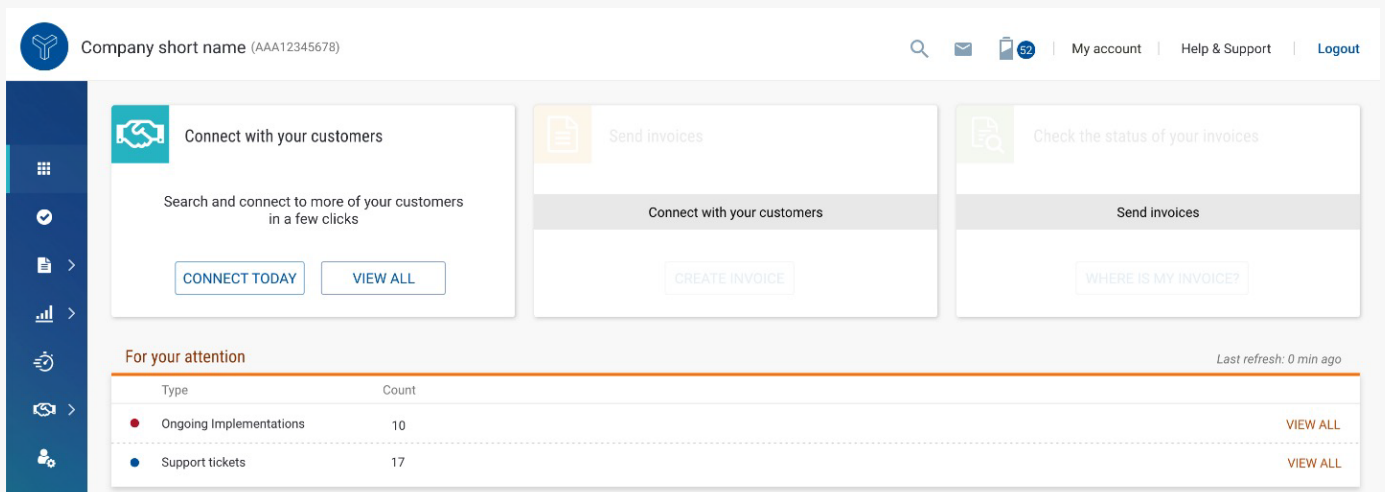
Our best practice integration should take **just 26 days to complete**, the days shown for each activity are below, but suppliers can edit these dates to reflect what is realistic for them, too.

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!

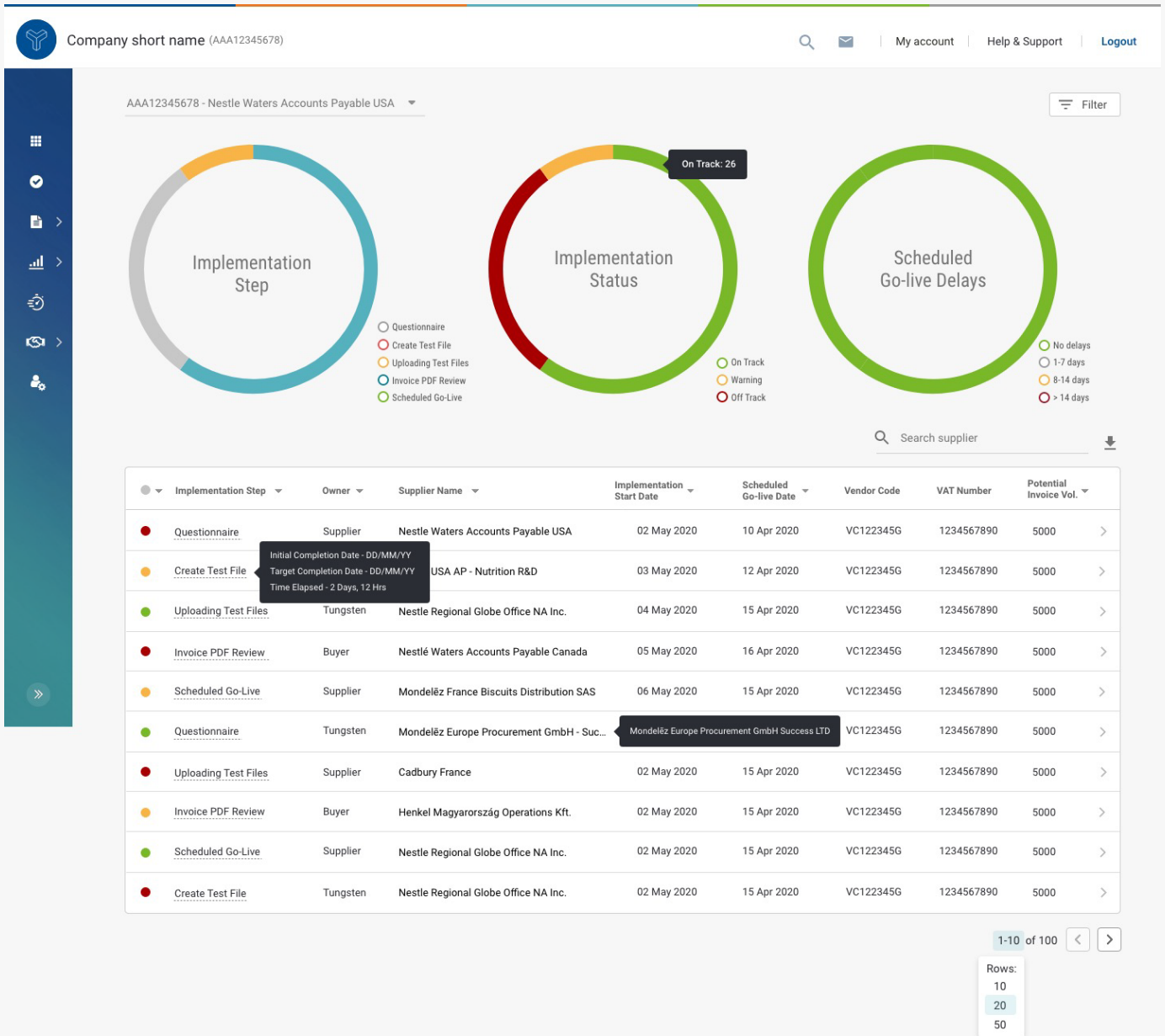
1. Login to the portal and navigate to the 'For your attention' list page or visit the 'Suppliers' tab and 'Supplier Onboarding Status' menu.



The screenshot shows the Supplier Connect dashboard interface. At the top, there is a header with the company name 'Company short name (AAA12345678)', a search icon, and navigation links for 'My account', 'Help & Support', and 'Logout'. Below the header, there are three main action cards: 'Connect with your customers' (with 'CONNECT TODAY' and 'VIEW ALL' buttons), 'Send invoices' (with 'CREATE INVOICE' button), and 'Check the status of your invoices' (with 'WHERE IS MY INVOICE?' button). At the bottom, there is a 'For your attention' section with a table showing the status of ongoing implementations and support tickets.

Type	Count	
● Ongoing Implementations	10	VIEW ALL
● Support tickets	17	VIEW ALL

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.

●	Questionnaire	Supplier	Nestle Waters Accounts Payable USA
●	Create Test File		USA AP - Nutrition R&D
●	Uploading Test Files	Tungsten	Nestle Regional Globe Office NA Inc.

Initial Completion Date - DD/MM/YY
 Target Completion Date - DD/MM/YY
 Time Elapsed - 2 Days, 12 Hrs

- 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.

🔍 Search supplier ↓

Vendor Code	VAT Number	Potential Invoice Vol. ▾
VC122345G	1234567890	5000 >

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.

Company short name (AAA12345678)

🔍 ✉ | [My account](#) | [Help & Support](#) | [Logout](#)

Onboarding Dashboard > Supplier Details

Nestle Nederland B.V. EXISTING

TN Number	VAT Number	Country	Vendor Code	Projected invoice vol.
AAA822350799	NL002179143B01	Netherlands	VC20001	5000

TIMELINE
RELATIONSHIPS (3)
CONTACTS

! Buyer approval needed for sample invoices. [Click here](#) to review

1	Questionnaire	COMPLETED DATE - DD/MM/YY	✔
2	Create Test File	COMPLETED DATE - DD/MM/YY	
3	Upload Test File	TARGET DATE - DD/MM/YY	⚠
4	Review Invoices	TARGET DATE - DD/MM/YY	⚠
5	Start e-invoicing	TARGET DATE - DD/MM/YY	🕒

Activity Log

- John Doe confirmed go-live date
4 hours ago
- Ricky Bobby approved sample invoices
8 hours ago
- Buyer approved sample invoices
2 days ago
- John Doe invited a new user
3 days ago
- John Doe invited a new user
3 days ago

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Relationships

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

The screenshot shows the 'Relationships' tab for 'Nestle Nederland B.V.' (status: EXISTING). The page includes a header with the company name and navigation links, a sidebar with various icons, and a main content area with three tabs: 'TIMELINE', 'RELATIONSHIPS (3)', and 'CONTACTS'. The 'RELATIONSHIPS' tab is active, displaying a table with three rows of buyer information. To the right, there is an 'Activity Log' section with five entries. The footer contains links for 'About Tungsten Network', 'FAQ', 'Terms of use', 'Privacy policy', and 'Contact Support', along with social media icons for LinkedIn, Twitter, and YouTube.

Company short name (AAA12345678)

Onboarding Dashboard > Supplier Details

Nestle Nederland B.V. (EXISTING)

TN Number: AAA822350799 | VAT Number: NL002179143B01 | Country: Netherlands | Vendor Code: VC20001 | Projected invoice vol.: 5000

TIMELINE | **RELATIONSHIPS (3)** | CONTACTS

TN Number	Buyer Name
AAA123456789	Company Name
AAA123456789	Company Name
AAA123456789	Company Name

Activity Log

- John Doe confirmed go-live date (4 hours ago)
- Ricky Bobby approved sample invoices (8 hours ago)
- Buyer approved sample invoices (2 days ago)
- John Doe invited a new user (3 days ago)
- John Doe invited a new user (3 days ago)

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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.

The screenshot shows the 'Contacts' tab for 'Nestle Nederland B.V.' (status: EXISTING). The page layout is identical to the 'Relationships' tab, but the 'CONTACTS' tab is active. The table displays contact information for three individuals, including their email addresses and roles. The 'Activity Log' and footer are also present and identical to the previous screenshot.

Company short name (AAA12345678)

Onboarding Dashboard > Supplier Details

Nestle Nederland B.V. (EXISTING)

TN Number: AAA822350799 | VAT Number: NL002179143B01 | Country: Netherlands | Vendor Code: VC20001 | Projected invoice vol.: 5000

TIMELINE | RELATIONSHIPS (3) | **CONTACTS**

Email Address	Role
firstname.lastname@company.com	Account Owner
firstname.lastname@company.com	Technical Contact
firstname.lastname@company.com	Technical Contact

Activity Log

- John Doe confirmed go-live date (4 hours ago)
- Ricky Bobby approved sample invoices (8 hours ago)
- Buyer approved sample invoices (2 days ago)
- John Doe invited a new user (3 days ago)
- John Doe invited a new user (3 days ago)

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4. Test invoice approval

The screenshot shows the 'SupplierConnect55' onboarding dashboard. The left sidebar contains navigation options: Home, Invoices, Suppliers, Supplier Connections, Supplier onboarding status, Supplier information, RTB management, RTB template management, Group management, and Reports. The main content area is titled 'Onboarding Dashboard > Supplier Details' and shows the supplier name 'SupplierConnect55' with a 'NEW' badge. Below this, there are fields for TN Number (AAA502999543), VAT Number (N/A), Country (Iceland), Vendor Code (vc_798765), and Potential Invoice Vol. (0). A red box highlights a notification banner that reads: 'Buyer approval needed for sample invoices. Click here to review'. Below the banner is a 'TIMELINE' section with the following tasks:

Task	Status	Target Date
1 Questionnaire	Completed	09/09/2021
2 Create Test File	Completed	09/09/2021
3 Upload Test File	Completed	09/09/2021
4 Review Invoices	In Progress	13/09/2021
5 Start e-invoicing	Not Started	15/09/2021

On the right side, there is an 'Activity Log' section with several entries, including 'Sample invoice scenario accepted' and 'Project plan updated'.

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.

The screenshot shows an email template from Tungsten Network. The header features the Tungsten Network logo and the text 'TUNGSTEN NETWORK'. Below this is a dark blue banner with the text 'REVIEW SUPPLIER SAMPLE INVOICES' and a magnifying glass icon. The main body of the email contains the following text:

Your Supplier's Implementation for [SupplierName], [VendorCode], [AAA] and yearly invoice volume of [Supplier Invoice Volume] is almost completed. To finalise the set-up, please review and approve or comment on the sample invoices. Please aim to do this within the next 2 days.

Below the text is a blue button labeled 'LOG IN'. At the bottom, there are two sections: 'NEED HELP?' with a telephone icon and 'RAISE SUPPORT TICKET' with a question mark icon. The footer includes the website 'www.tungsten-network.com', social media icons for LinkedIn, Twitter, and YouTube, and the copyright notice 'Copyright © 2020 Tungsten Network Ltd.'

Example PDF invoice approval email.

Onboarding Dashboard > Supplier Details > Invoice Approval

Review & Approve PDF

Please confirm this PDF represents a [multiple lines per invoice](#) sent from [SupplierConnect55 - AAA502999543]

ARCO Ltd		Invoice	
Invoice from	ARCO Ltd Hull HU1 2SJ	Invoice to	GlascoSmithWine Magpie Wood Mastor Royal CRANLEY RH10 9QJ GB
Contact	Tel Email	Invoice No.	0908270066
Delivered to	GSK Crawley SPIDER Facility South Side Crawley Avenue CRANLEY RH10 9NR GB	PO Number	AR5494146
Remit To Address	ARCO LIMITED PO BOX 21 WAVERLEY STREET HULL HU1 2SJ UNITED KINGDOM	Vendor Code	JDE: 00203439
Line	Item Description	Quantity	Unit
			Unit Price
			Net Total
			VAT %
			VAT

✔ Supplier Approval
 🕒 Buyer Approval

Add a comment

APPROVE
REJECT

- 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 frame 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