



QAD Supplier Portal: General Setup (Supplier Administrators)

Course Overview

- Discusses all the SP setup that supplier admins need to work with:
 - Company Maintenance
 - Users – Browse, roles, and Creation
 - User Login Summary
 - Partners Maintenance
 - Profile changes by the user

Discusses all the SP setup that customer and supplier admins need to work with:

- Company Maintenance
- Users
- Suppliers
- Data Management
- Item Site Maintenance
- User Login Summary
- User Labels
- Mass Actions
- Profile

Supplier Portal — General Setup

Company Maintenance

Company Maintenance – Supplier Admins

- Supplier admins use Company Maintenance to:
 - Review their address information
 - Update company Size and Revenue if desired
 - For some setup tasks, such as those related to consolidated accounts

Supplier admins use Company Maintenance to:

- Review their address information
- Update address information, if Profile Self Service is activated
- For some setup tasks, such as those related to consolidated accounts

Company Maintenance Panels

- General
- Address
- Consolidated Account

Company Maintenance Panels

- General
- Address
- Items
- Purchase Orders
- ASNs
 - Labels
- Receipts
- Invoices
 - Invoice Self-Service
- Supplier Delivery Performance
- Profile Self-Service
- Quality Management Policies
- User Defined Fields
- Users
- Passwords
- Consolidated Account
- Training Accounts
- System Monitoring
- Subscription
- Working Data Set
- Single Sign-On

General Panel

The screenshot shows a web form for 'General Setup' with three main sections: 'General Information', 'Address', and 'Consolidated Account'. The 'General Information' section includes fields for Company (002100), Name (EXAMPLE SUPPLIER), Business ID (002100), DUNS Number, Company Size (Unspecified), Revenue (Unspecified), and Product Capabilities. The 'Address' section includes Address (12345 MAIN STREET), Postal Code (49546), and City (ANYWHERE). The 'Consolidated Account' section has a 'Create' button and a Company field. Two callout boxes are present: a blue one stating 'For supplier companies, the company name defaults from the data source.' and a green one stating 'Important: Supplier admins cannot modify their own company information, with the exception of company size and revenue. Contact your buyer or the Supplier Development Manager if any information is incorrect.'

The company name defaults from the subscription form. For supplier companies, it defaults from the data source.

Admins can edit the following fields:

- *Name*
- *Business ID*
- *DUNS Number*
- *Company Size*
- *Revenue*

Both customer and supplier admins see this panel in Company Maintenance.

Consolidated Account Panel

Consolidated Account

Company

Lets admins consolidate the data for multiple QAD Supplier Portal customer entities into one view

If the company has not yet created a consolidated account, the **Create** button is visible

Using consolidated accounts, admins can consolidate the data for multiple customer entities into one view. The Create button in this panel lets you create a customer consolidated account.

Supplier Portal — General Setup

Users

Users

- What is a user in Supplier Portal?
- Roles
- Access to Users browse
- Users browse
- Users browse panels
 - Common panels with the Profile screen
- “Master Admin” Concept
- Creating a user

- What is a user in Supplier Portal?
- What does the Users browse expose?
- Roles
- How do they work?
- Who can modify roles?
- Who has access to roles?
- Users browse panels
 - Common panels with the Profile screen
- “Master Admin” Concept
- Creating a user

What is a User in Supplier Portal?

- A user ID enables a supplier user to log in to QAD Supplier Portal
- A user ID belongs to an admin, a non-admin role group, or to both
 - **Note:** Admin users often belong to both role groups

A user ID enables a customer or supplier user to log in to QAD Supplier Portal.

A user ID belongs to an admin or a non-admin role group, or to both.

Note: Admin users often belong to both role groups.

Roles

- Your system has predefined, pre-configured roles
- For suppliers, two types of roles exist:
 - administrator roles
 - non-administrator roles

Your system has predefined, pre-configured roles.

For both customers and suppliers, two types of role exist:

- administrator roles
- non-administrator roles

Supplier Administrator Role

Users with this role have access to:

- **Supplier** menu, which provides access to all the supplier business functionality that QAD SP provides
- **Supplier Administrator** menu, which provides access to the setup and business logic parameterization of QAD SP from a supplier point of view

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Supplier (Non-Administrator) Role

- Users with this role only have access to the **Supplier** menu

Users with this role only have access to the **Supplier** menu.

Who Can Modify Roles?

- Customer admin user can also modify roles for supplier admin master users
- Supplier admin users can modify roles for supplier users
- Users cannot modify their own roles

- Customer admin users can modify roles for customer users
- Customer admin user can also modify roles for supplier admin master users
- Supplier admin users can modify roles for supplier users
- Users cannot modify their own roles
- Poller users cannot modify roles

Users Browse – Who Has Access?

- Supplier admins
- Consolidated supplier admins

Users Browse – Who Has Access?

- Customer admins
- Supplier admins
- Consolidated customer admins
- Consolidated supplier admins

Users Browse

The **Users** browse shows different data, depending on the admin user's role

Users | Default View | + New | Edit | More

User ID greater or equal to Search

Active	User ID	User Name	Business ID	Organization Name	Job Title
yes	cats	CATS CATS	CATS COMP	CATS COMP	CATS
no	cats45665454	hjkhkj nfgfhd hjkhjk	CATS COMP	CATS COMP	jobTitle
no	cats_adm_1	Hector Pelicano	CATS COMP	CATS COMP	jobTitle
yes	cats_cust_no_adm	cats no adm	CATS COMP	CATS COMP	jo
no	cats_test_ifp2	ifp ifp	CATS COMP	CATS COMP	jobTitle
no	demoUser1	demoUser1 Smith	CATS COMP	CATS COMP	jobTitle
no	demoUser5	demoUser5 Joe last...	CATS COMP	CATS COMP	Manager
no	gfd	dfg Hector Pelicano ...	CATS COMP	CATS COMP	jobTitle
yes	poller-759957.KANB...	Kanban poller user	CATS COMP	CATS COMP	aa
yes	poller-759957.KANB...	Kanban poller user	CATS COMP	CATS COMP	aa

users

The **Users** browse shows different data, depending on the admin user's role.

What Data Does Each Role See?

- Supplier admin users see all users in the supplier organization
- Supplier consolidated admin users see:
 - All users in the supplier consolidated organization
 - Users in any linked organizations (supplier users only)

Important: Even though supplier users are created from the customer organization, customer admins do not see these user accounts

Customer admin users see:

- All users in the customer organization
- Poller users

Supplier admin users see all users in the supplier organization

Customer consolidated admin users see:

- All users in the customer consolidated organization
- Users in any linked organizations (customers users only)
- Poller users from linked organizations

User Maintenance Detail Screen

- Use to create user accounts and to maintain user accounts, including:
 - Contact information
 - Roles
 - Password changes
 - Notification settings

Use to create user accounts and to maintain user accounts, including:

- Contact information
- Roles
- Password changes
- System monitoring settings
- Notification settings
- Maintaining the poller account password and time zone

Users – Tasks

- Customer administrator user-related tasks:
 - Create supplier master users
 - Prevent suppliers from creating new users, if needed

- Supplier administrator user-related
 - Create supplier users

- Customer administrator user-related tasks:
 - Create customer users
 - Create supplier master users
 - Prevent suppliers from creating new users, if needed

- Supplier administrator user-related
 - Create supplier users

Creating Supplier Master Admin and Supplier Users

- The customer admin must:
 - Create the supplier master admin account
 - Provide the supplier master admin account details to the supplier company
 - Supplier master admin user defines the user name and initial password for subsequent admin accounts in the company

- The customer admin must:
 - Activate the supplier record
 - Create the supplier master admin account
 - Provide the supplier master admin account details to the supplier company
 - Then, the supplier admin can create supplier user accounts

Supplier Master Admin User

- The supplier can log in using the master admin account and start creating new supplier users
- New supplier users created by the supplier master admin is *outside of the control* of the customer

- Process where a customer administrator creates the first user for the supplier
 - The master admin user
 - Cannot be deleted
- The supplier can log in using the master admin account and start creating new supplier users
- New supplier users created by the supplier master admin is *outside of the control* of the customer

Users View

Click **New** to create a new user account

User ID	User Name	Business ID	Organization Name	Job Title
cats	CATS CATS	CATS COMP	CATS COMP	CATS
cats45665454	cats Smith	CATS COMP	CATS COMP	jobTitle
cats_adm_1	Hector Pelicano	CATS COMP	CATS COMP	jobTitle
cats_cust_no_adm	cats. no adm	CATS COMP	CATS COMP	jo
cats_test_ifp2	demo ifp	CATS COMP	CATS COMP	jobTitle
demoUser1	demoUser1 Smith	CATS COMP	CATS COMP	jobTitle
demoUser5	demoUser5 Joe last...	CATS COMP	CATS COMP	Manager

The Users browse shows different data, depending on the admin user's role.

Click **New** to create a new user account.

Users – Contact Information Panel

The screenshot displays the 'Users' management interface. A list of users is on the left, with 'cats' selected. The main panel shows the 'Contact Information' subpanel for user 'cats'. The 'Roles' subpanel is also visible, with 'Functional User' and 'Administrator' checkboxes. A yellow callout box explains the 'Roles' subpanel, and an orange callout box provides an important note about modifying settings for master admin users.

The Roles subpanel lets you specify what roles a user has, where the options are **Functional User and **Administrator****

Important: You cannot modify the settings for the roles assigned to master admin users

The Contact Information panel lets you create and modify information such as the user's ID, name details, and phone numbers and email addresses. In addition, the panel lets you specify what roles a user has, where the options are Functional User and Administrator.

The Functional User checkbox is selected by default when you create new users and provides the user with access to non-admin QAD Supplier Portal functionality. The Administrator option provides the user account with access to the Administrator menu options in QAD Supplier Portal. You must select at least one checkbox and you can also select both checkboxes for a role.

Users – Languages, Address, Change Password, System Monitoring, Preferences Panels

The screenshot shows the 'User Maintenance' interface with several panels highlighted by red boxes and annotated with yellow callout boxes:

- Languages:** Contains 'Language' and 'Format Locale' dropdown menus, both set to 'English (United States)'.
- Address:** Contains 'Address' and 'Postal Code' text input fields, and 'Country', 'Country Code', 'Region', and 'State' dropdown menus.
- Change Password:** Contains a 'Change Password' button and a 'Force Password Change' checkbox.
- System Monitoring:** Contains a 'Receive Emails' dropdown menu (set to 'Yes') and an 'Email' text input field (set to 'hcxp@qad.com').
- Preferences:** Contains a 'CSV Delimiter' text input field.

Callout boxes provide additional information:

- 'Force password changes' points to the 'Force Password Change' checkbox.
- 'An additional Poller panel is visible when you view a poller user account' points to the right side of the interface.
- 'Enables users to monitor the Supplier Portal service in a timely manner' points to the 'System Monitoring' panel.
- 'Set the file delimiter to use when loading CSV files for ASNs' points to the 'CSV Delimiter' field.

The QAD logo is in the bottom left corner, and the page number '24' is in the bottom right corner.

The Languages panel contains the same languages fields as the Profile screen and lets you set the user’s language and locale.

The Change Password panel lets you modify a user’s password. The user has options to:

- Directly change the user’s password by clicking the Change Password button
- Force the user to change password the next time the user logs in to QAD Supplier Portal

System monitoring capabilities in QAD Supplier Portal enable users to monitor the Supplier Portal service in a timely manner, and to easily detect system failures and data inconsistencies. The System Monitoring panel contains two fields: Receive Emails and Email Address. The Receive Emails field lets you specify whether the user should receive QAD Supplier Portal system monitoring emails. The Email Address field lets you specify the address to which the system monitoring emails must be sent. It is recommended that you activate system monitoring for the VMI Poller user account and for the Kanban Poller user account.

The Poller panel is only visible when you view a poller user account and allows you to set the user’s timezone.

The Preferences panel lets you set the CSV file delimiter to use. This single character delimits fields when importing/exporting CSV files; the default is a comma (,).

Users – Notifications Panel

The **Notifications** panel contains the same fields as those in the Profile screen

Indicate whether notifications for each **notification category** will be sent to the user's QAD Inbox or email address

Indicate whether notifications for each **event category** will be sent to the user's QAD Inbox or email address

Category Name	QAD Inbox	Email
Activity	Yes	Yes
Alerts	Yes	Yes
Reports	Yes	Yes

Category Name	Event Name	QAD Inbox	Email
Activity	Activity Feed Comment	All	All
Activity	Activity Feed Tagged	All	All
Alerts	Alert Message	All	Configured

The Notifications panel contains the same fields as those in the Profile screen. Category Settings indicate whether notifications for each notification category (Activity, Alerts, and Reports) will be sent to the user's QAD Inbox or email address. A notification category can include various types of events. Event Settings indicate whether notifications for each event category will be sent to the user's QAD Inbox or email address.

Users – Set Password

When you complete the fields in **Users** for a new user and click **Save**, the **Set Password** popup opens, where you can set the new user's first password

Displays the password constraints set in **Company Maintenance**

When you complete the fields for a new user and click Save, the Set Password popup opens.

Supplier Portal — General Setup

User Login Summary

User Login Summary

- Purpose of User Login Summary
- What do supplier admins see?
- User Login Summary Browse

- Purpose of User Login Summary
- What do customer admins see?
- What do supplier admins see?
- User Login Summary Browse

Purpose

- Lets supplier admin users view the login and logout history for users
- Provides more control over user access
- The view shows data for the previous six months

- Lets admin users view the login and logout history for users
- Provides more control over user access
- The view shows data for the previous six months

What Do Supplier Admins See?

- Supplier administrators can see all login activity for:
 - Supplier users
 - Consolidated supplier users

Supplier administrators can see all login activity for:
Supplier users
Consolidated supplier users

User Login Summary Browse

User Login Summary Default View More

User ID greater or equal to Search

User ID	Name	Email	Telephone No	Customer	Customer ...	Logged On #1	Supplier	Supplier Name	Logged Off #2
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 5:02 AM			12/9/2020 5:09
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 4:19 AM			12/9/2020 5:02
cats_sup1	sup1 sup1	hcp@qad.com	3234234432432	CATS COMP	CATS COMP	12/9/2020 4:17 AM	10PLATSP	Plating Subcontractor - U...	12/9/2020 4:19
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 4:16 AM			12/9/2020 4:17
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 4:15 AM			12/9/2020 4:16
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 4:11 AM			12/9/2020 4:14
cats	CATS CATS	hcp@qad.com	789789	CATS COMP	CATS COMP	12/9/2020 4:09 AM			
cats_sup2	cats_sup2 cats_sup2	hcp@qad.com	4654654	CATS COMP	CATS COMP	12/9/2020 4:08 AM	1051001	Taylor & Fulton Fruit Co.	12/9/2020 4:09
cats	CATS CATS	hcp@qad.com	789789			12/9/2020 4:07 AM			12/9/2020 4:08
cats_sup2	cats_sup2 cats_sup2	hcp@qad.com	4654654			12/9/2020 4:07 AM	1051001	Taylor & Fulton Fruit Co.	12/9/2020 4:07
cats	CATS CATS	hcp@qad.com	789789			12/9/2020 4:06 AM			12/9/2020 4:06

Login and logout dates and times

Use the **Supplier** column to differentiate user types:
 -- for supplier users, there is an entry

Important: User log-in records cannot be deleted from within QAD Supplier Portal

Use the **Supplier** column to differentiate user types:

- for supplier users, there is an entry
- for customer users, there is none

Important: User log-in records **cannot be deleted** from within QAD Supplier Portal; use a **Cron job** to perform a mass delete.

Supplier Portal — General Setup

Partners Maintenance (Supplier Administrator)

Partners Maintenance

- Menu in Supplier Administrator role menu
- Contains two sub-menus that let suppliers record DUNS numbers:
 - Manufacturer DUNs Number
 - Ship-From DUNs Number

- Menu in Supplier Administrator role menu
- Contains two sub-menus that let suppliers record DUNS numbers:
 - Manufacturer DUNs Number
 - Ship-From DUNs Number

DUNs Number

- Unique nine-digit [data universal numbering system \(DUNS\)](#) number with a four-digit suffix
 - Identifies a specific location within your company;
 - For example, a distribution center or a store.
- Issued by [Dun & Bradstreet](#) to US businesses
- Act as a unique identifier for EDI and global electronic commerce transactions

- Unique nine-digit [data universal numbering system \(DUNS\)](#) number with a four-digit suffix
 - Identifies a specific location within your company;
 - For example, a distribution center or a store.
- Issued by [Dun & Bradstreet](#) to US businesses
- Act as a unique identifier for EDI and global electronic commerce transactions

Note: This menu item is available to supplier administrators only.

Accessing Partners Maintenance

The screenshot displays the QAD Supplier Portal interface. The top navigation bar includes the QAD logo, a dropdown menu for 'Supplier Administrator' (circled in red), and other menu items: 'Company Maintenance', 'Users', and 'More'. A search icon and a notification icon with '6355' are also present. The 'More' dropdown menu is open, showing 'User Login Summary' and 'Partners Maintenance' (highlighted with a blue arrow). The 'Partners Maintenance' dropdown includes 'Manufacturer DUNS Number' and 'Ship-From DUNS Number' (both highlighted with a red box). Below the navigation bar is a large blue square with the QAD logo. The main content area displays 'Welcome, sup1 sup1' and a message: 'You can set any page as your home page by selecting 'Set Current as Home' from the user menu.' A 'Guide Me' button is located at the bottom of the main content area.

Manufacturer DUNS Number

Manufacturer DUNS Number

Default View + New More

DUNS Number	Description
test_def	test_def

899006578
DUNS Number

Main

Main

DUNS Number 899006578

Description Ali Gate Corporation

Default

Use Manufacturer DUNS Number to record all possible manufacturer DUNS numbers that the organizations uses.

Ship-From DUNS Number

Ship-From DUNS Number

Default View + New More

DUNS Number	Description
150483782	DUNS Number
test_def	test

Main

Main

DUNS Number 150483782

Description Laces Inc Corporation

Default

Use Ship From DUNS Number to record all possible ship-from DUNS numbers that the organizations uses.

Supplier Portal — General Setup

Profile

Profiles

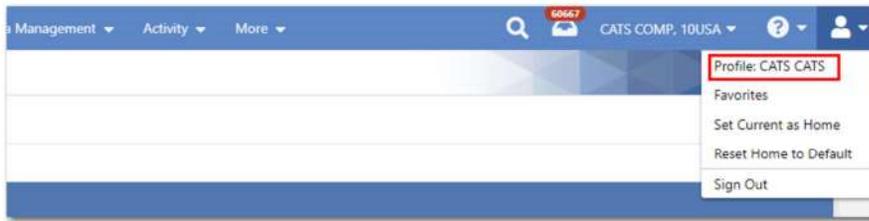
- Displays a user's contact information
- Provides options to select Language, Format Locale
- Configure how you (the user) want to receive notifications for alerts

Displays a user's contact information.

Provides options to select Language, Format Locale.

Configure how you (the user) want to receive notifications for alerts.

Accessing the Profile



Profile settings include options for alert notification preferences.

Profile – Contact Info, Roles Contact Details

The screenshot shows the 'Profile' page for user 'CATS CATS' (hcp@qad.com). A yellow banner at the top states: 'Profile changes will take effect the next time you sign in to QAD.' The page has a navigation menu with 'Contact Information', 'Roles', 'Contact Details', 'Languages', 'Address', 'Change Password', 'System Monitoring', 'Preferences', 'Document Request', and 'Notifications'. The 'Contact Information' panel includes fields for User ID (cats), Active status, Email (hcp@qad.com), Business ID (CATS COMP), First Name (CATS), Middle Name, Last Name (CATS), and Job Title (CATS). The 'Roles' panel shows 'Functional User' and 'Administrator' roles. The 'Contact Details' panel is a table with columns 'Type' and 'Value':

Type	Value
Work Phone	789789
Home Phone	45454554
Email 1	hcp@qad.com
Email 2	hcp@qad.com

Three callout boxes provide instructions: a green box points to the 'Contact Information' and 'Contact Details' panels, stating 'Use the Contact Information and Contact Details panels to update your own contact information'; a blue box points to the 'Roles' panel, stating 'Use the Roles panel is read only. Only admin users can update these settings in the Users screen'; and a red box highlights the 'Contact Information' panel header.

Use the **Contact Information** and **Contact Details** panels to update your own contact information. Use the **Roles** panel is read only. Only admin users can update these settings in the **Users** screen.

Profile – Languages, Address, Change Password

The screenshot shows a web form titled "Profile – Languages, Address, Change Password". It is divided into three main sections:

- Languages:** Contains two dropdown menus for "Language" and "Format Locale", both currently set to "English (United States)". A green callout box says "Use the Languages panel to update your own language settings".
- Address:** Contains several input fields for "Address", "Postal Code", "County", "Country" (set to "Argentina"), "Country Code" (set to "ARG"), "Region" (set to "Latin America"), and "State". A blue callout box says "Use the Address panel to update your address details".
- Change Password:** Contains a "Change Password" button and a "Force Password Change" checkbox. A green callout box says "Click the Change Password button to update your password".

Language

The user's language. When the user signs in, the user interface will display in this language. From the drop-down, select from the supported languages.

Format Locale

The user's locale. When the user signs in, the user interface will display data (such as dates) in a format appropriate for this locale. From the drop-down, select from the supported format locales.

Note that Language and Format Locale changes will take effect the next time the user signs in to QAD.

Profile – System Monitoring, Preferences, Doc Requests

The screenshot displays the 'General Setup' page for a Supplier Portal profile, divided into three main sections:

- System Monitoring:** Includes a 'Receive Emails' checkbox set to 'Yes' and an 'Email' field. A callout box states: 'Only customer admins and customer users see the **System Monitoring** panel'.
- Preferences:** Includes a 'CSV Delimiter' dropdown menu set to a comma. A callout box states: 'When importing and exporting CSV files, it is best to have this value match the locale-specific delimiter for list separators'.
- Document Request:** Includes a 'Document Request Certif...' field containing the text 'dsfsd'. A callout box states: 'Specify your security certificate for document requests'. Another callout box to the right states: 'The **Document Request** panel is hidden for consolidated and poller users'.

Only customer admins and customer users see the System Monitoring panel. Set **Receive Emails** to **Yes** to receive system monitoring emails. Specify your email address.

When importing and exporting CSV files, it is best to have this value match the locale-specific delimiter for list separator that is defined in the Regional and Language options section of the system Control Panel.

The Document Request panel is hidden for Consolidated and Poller roles. Specify your security certificate for document requests. This field will be editable for customer users only if the Use Document Request policy is Yes at customer level. This field will be editable for supplier users if the Use Document Request policy is Yes at customer level and the Use Document Request policy at supplier level is Yes or Default.

Profile – Notifications

Notifications

Receive Notifications User selects whether to receive alert notifications

Category Settings

Edit More

Category Name	QAD Inbox	Email
Activity	Yes	Yes
Alerts	Yes	Yes
Reports	Yes	Yes
	es	No

Select for alert delivery to Inbox and/or Email

Receive Notifications: Select whether the user will receive notifications.
Category Settings: Category settings indicate whether notifications for each notification category (Activity, Alerts, and Reports) will be sent to the user's QAD Web UI Inbox and/or email address. In this case, the user wants to have alerts sent to their QAD Web UI Inbox.

Event Settings

Event Settings

Edit Details More

Category Name	Event Name	QAD Inbox	Email
Activity	Activity Feed Comment	All	All
Activity	Activity Feed Tagged	All	All
Alerts	Alert Message	All	Configured
Alerts	Field Tracking	All	Configured

Select for alert delivery to
Inbox and/or Email

Event Settings: A notification category can include various types of events for a category. Event settings indicate whether notifications for each category event will be sent to the user's QAD Inbox or email address. The user can choose either **All** (send all notifications for) or **None**.

For the Alerts category, we have two types of events: Alert Message and Field Tracking.

An Alert Message event is when a message notification is generated based on the conditions and message specified for an alert defined with the **Send alert when conditions are met** option specified.

A Field Tracking event is when a system notification is sent because of a field change, as specified for an alert defined with the **Send alerts about changes to fields** option specified.

Typically, for alerts, a user would want to receive notifications for both of these event types, but managing the event settings can help to reduce Inbox clutter.

For example, if a particular user is getting many alert notifications about ongoing changes to fields (Field Tracking) that are in general not of interest to the user, but still wants to get the messages for when specific conditions are met (alert message), they can control that here, reducing the number of alert notifications in their Inbox.



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