Training Document for Williams Sonoma Vendors

September 2014

Agenda

1	Introduction and Workflow
2	Logging In & the Home Page
3	Purchase Order and Amendments
4	PO Collaboration
5	Order Assignment
6	Administration and Reports
7	GT Nexus Support Contacts

Introduction and Workflow

Introduction

Williams Sonoma is pleased to announce that GT Nexus will be implemented as the global supply chain collaboration and visibility platform for all upcoming purchase orders. GT Nexus benefits include:

- Electronic delivery of purchase orders and purchase order amendments.
- Real time visibility and reporting to all parties
- Improved communication among all parties, via PO Collaboration
- Reduced processing time, cost and errors
- Full web-based purchase order and purchase order amendment visibility.

GT Nexus – Williams-Sonoma Solution

Order Collaboration

- Provide a robust solution for Williams-Sonoma to directly manage their Vendors and to enable the replacement of William E. Connor as their agent.
- Provide a method to collaborate with Vendors to negotiate and confirm PO's electronically.
- Provide full audit history of PO acknowledgement and confirmation.
- Automate and track changes to PO's throughout the transaction lifecycle.

Factory Management

- Enable auto assignment of Factory where a single factory is associated to the vendor organization.
- Allow Vendors to assign a single factory to the Purchase Order where multiple factories are available.
- Provide flexibility for the Vendors to change the factory from the currently assigned factory.

Browser Version Impact

The GT Nexus system is built on the latest technology. While the majority of the system is backward compatible with older browsers, the best experience will be seen using the latest stable version of a modern browser.

The following is a list of modern browsers ordered by quality of user experience in the system.

1. Google Chrome - latest stable version (5.0 or later)
2. Mozilla Firefox - latest stable version, either Consumer or Enterprise channel (3.6 or later)
3. Microsoft Internet Explorer 9.0+ (latest version after version 9). Only supported on Windows Vista, Windows 7 or later.
4. Older versions (less than 1 year old) of Chrome, or Firefox give a very comparable user experience to running the latest stable version.
5. Apple Safari - latest stable version. Note that the Factory Management only supports Windows OS.

Note: Using an older browser may result in slower than normal load times, and format anomalies when viewing and printing.

Vendor Expectations

- WSI no longer plays the role of the middle man in PO processing:
  - All Vendors must communicate directly with WSI Inventory Teams via the GT Nexus Platform. (No Emails)
  - All Vendors must negotiate PO changes directly with WSI Inventory Teams.
  - All Vendors must accept PO's in GT Nexus.
- Vendors must respond to a PO within 2 (two) days.
- Vendors must plan for staffing based on having multiple WSI Inventory contacts. There will not be a central contact.
- Vendors should involve their WSI Country representative if:
  - They do not receive a response within 7 (seven) working days from WSI Inventory Teams.
  - They cannot reach consensus on a PO with Inventory after multiple cycles.

Change in Shipping Invoices Submission Process

- Starting June 15, 2014, all invoices and supporting documentation must be submitted via email to the AP Department. (Limit each email to 5MB)
- For WSSPL (Williams Sonoma Singapore) PO's shipping to US, all invoices and supporting documentation must be submitted via email to wssplus@wsgc.com.
- For WSSPL PO's shipping to Alshaya or Australia, all invoices and supporting documentation must be submitted via email to wsspl@wsgc.com.
- Questions regarding Invoices will be sent to :
  - Roy Chong: rchong@wsgc.com
  - Richmond Lim: rlim@wsgc.com

Invoicing

- **ALL** vendors must send WSSPL invoices and required documents in one attachment to:

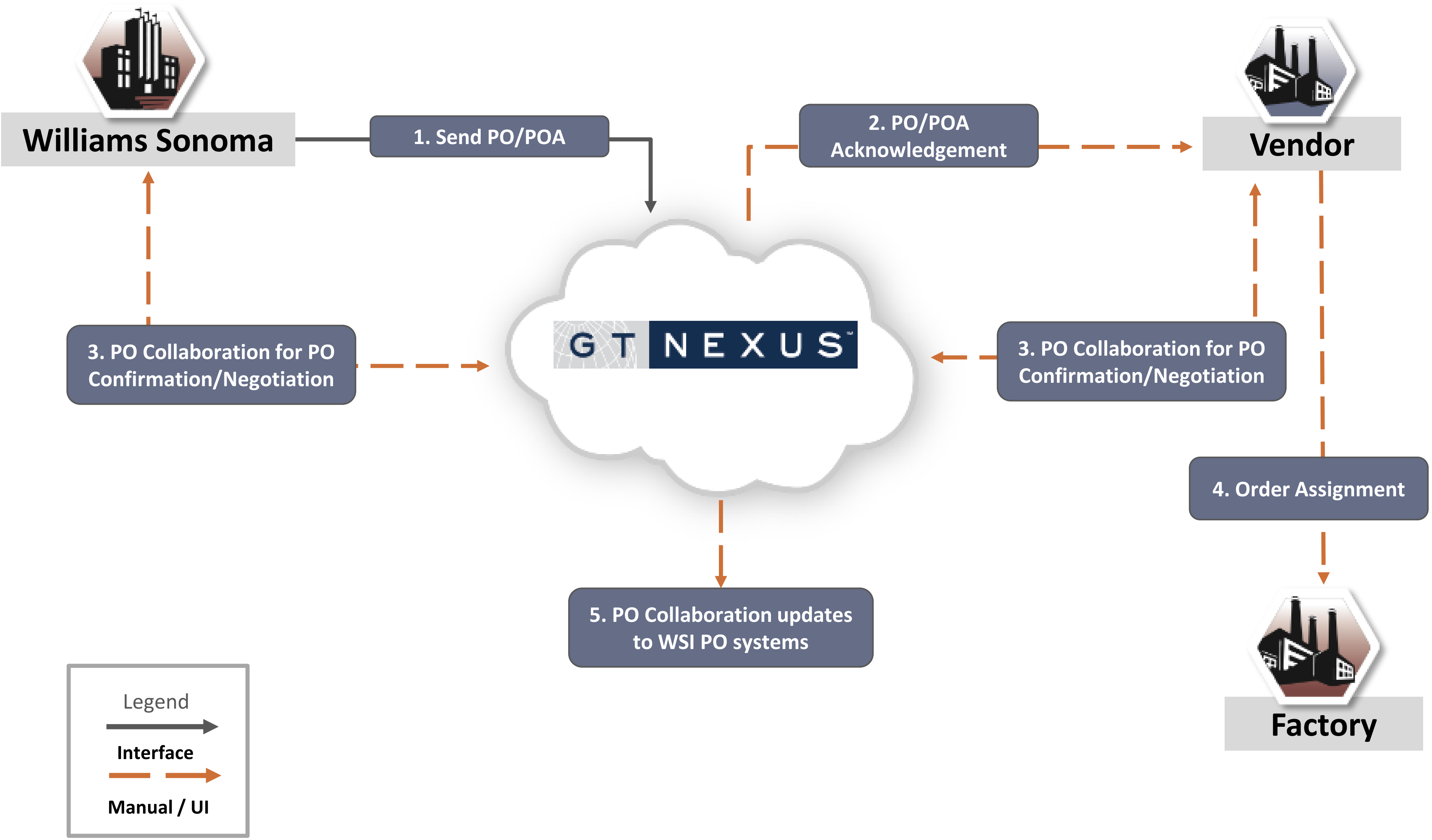
US Shipment	Alshaya / SSI / Australia / UK Shipment
WSSPLUS@WSGC.COM **Documents:** ▪ Commercial Invoice ▪ Packing List ▪ Inspection Certificates ▪ GCC ▪ Forwarder's Cargo Receipt / Air Waybill	**WSSPL@WSGC.COM** **Documents:** ▪ Commercial Invoice ▪ Packing List ▪ Inspection Certificates ▪ Certificate of Origin (For Alshaya) ▪ Forwarder's Cargo Receipt / Air Waybill

- Ensure all Invoices and accompanying documents are clear and legible
- Invoice must clearly state the WSSPL PO number and SKU number
- Invoice must be billed in currency as per WSSPL PO
- Maximum file size per email is 5MB
- Please state your company first name, our purchase order number and your invoice number in the email subject line so we can track the invoice document electronically.

Invoicing

- If replacement parts are provided at no cost, please deduct the dollar amount from the total invoice amount.
- Any invoice without Purchase Order (e.g. sample, liability of cancel POs) should be sent to WSI buyer for approval. WSI buyer will need to return the approved invoice to AP for processing of payment. Vendor should not submit the invoice directly to AP and expect to be paid without approval.
- Please note that invoices not supported by a Williams-Sonoma PO will not be paid.
- Any additional charges associated with POs (LCL charges, handling charges) should be attach with WSI buyer's email approval in advance when vendor submits an invoice.
- If the price on the invoice is higher than the price on the purchase order, AP will issue a debit memo for price discrepancy and deduct it from vendor's payment. Vendors should check the price on Purchase order before they ship/invoice the product. If the price is not correct on the Purchase Order, vendor will need to contact WSI buyer prior to shipment (immediately) and have it corrected.

Williams-Sonoma - GT Nexus Process



Williams Sonoma - GT Nexus Process

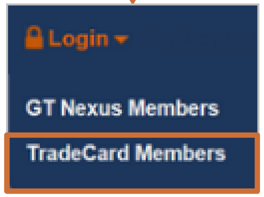
1. The Purchase Order (PO) and any subsequent changes (via Purchase Order Amendment (POA)) are sent to GT Nexus from the WSI PO System and are auto acknowledged within GT Nexus.
2. All PO and POA changes are available to the Vendor for their viewing.
3. WSI and Vendors will collaborate to confirm PO's.
4. WSI Local Office Agents will have view access to the PO collaboration platform.
5. WSI will manually update the changes, from the negotiation, in WSI PO System and trigger the update in a Purchase Order Amendment (POA).
6. Factory will be auto assigned where there is only a single factory for a vendor. Manual assignment is required for vendors with multiple factories.
7. The Vendor must confirm all orders and order amendments within the PO Collaboration Worksheet.
8. PO Status will be maintained in Supply Chain Visibility (Pending / Accepted). (Accessible to WSI personal only.)

Log In and the Home Page

How to log into GT Nexus

To log into **GT Nexus** (formerly **TradeCard**), complete the following steps.

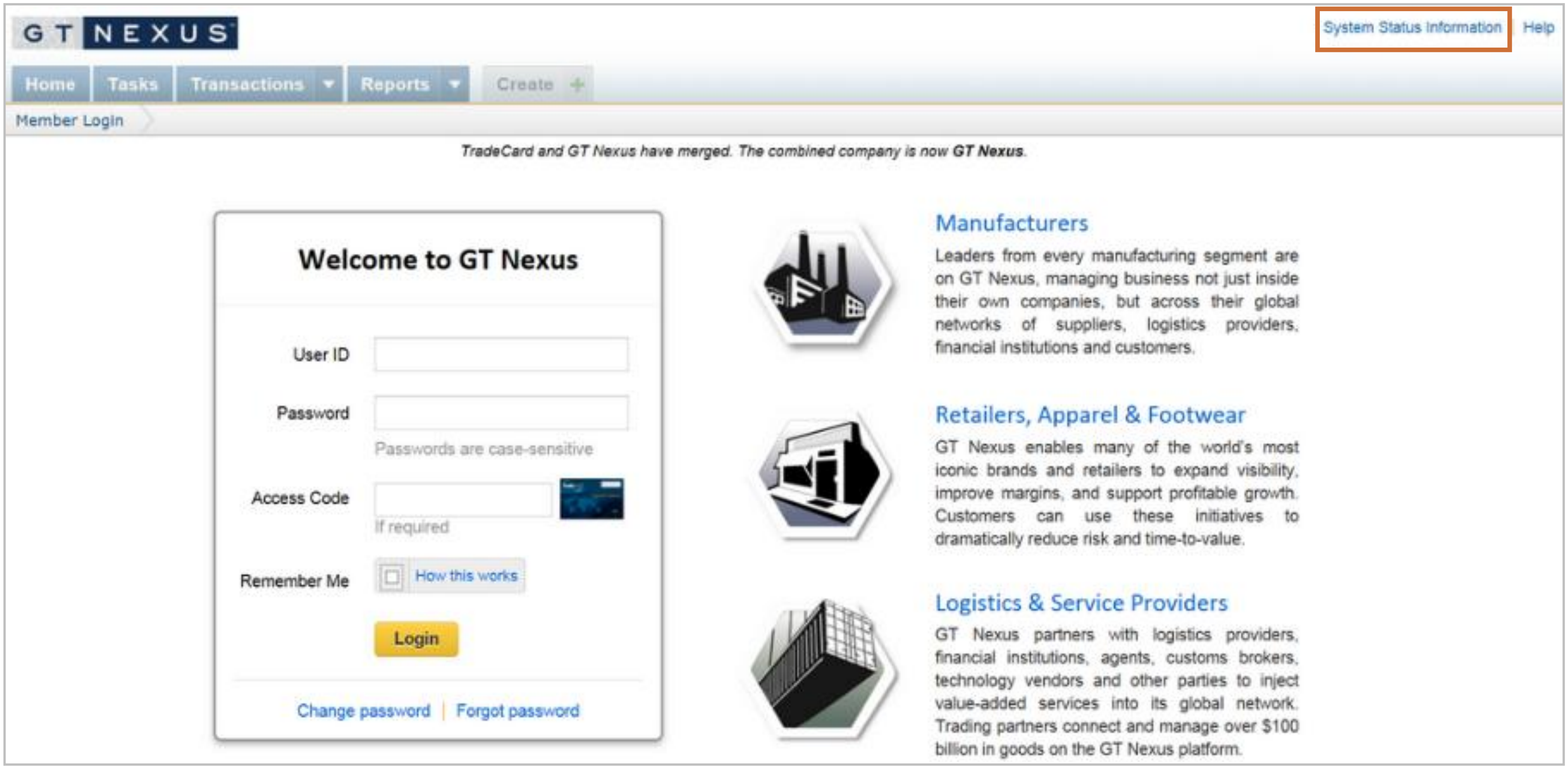
1. Use the www.gtnexus.com link to go to the **GT Nexus** home page.
2. Click **Login**, select **TradeCard Members**. The **TradeCard Member Login** page displays.



About System Status Information

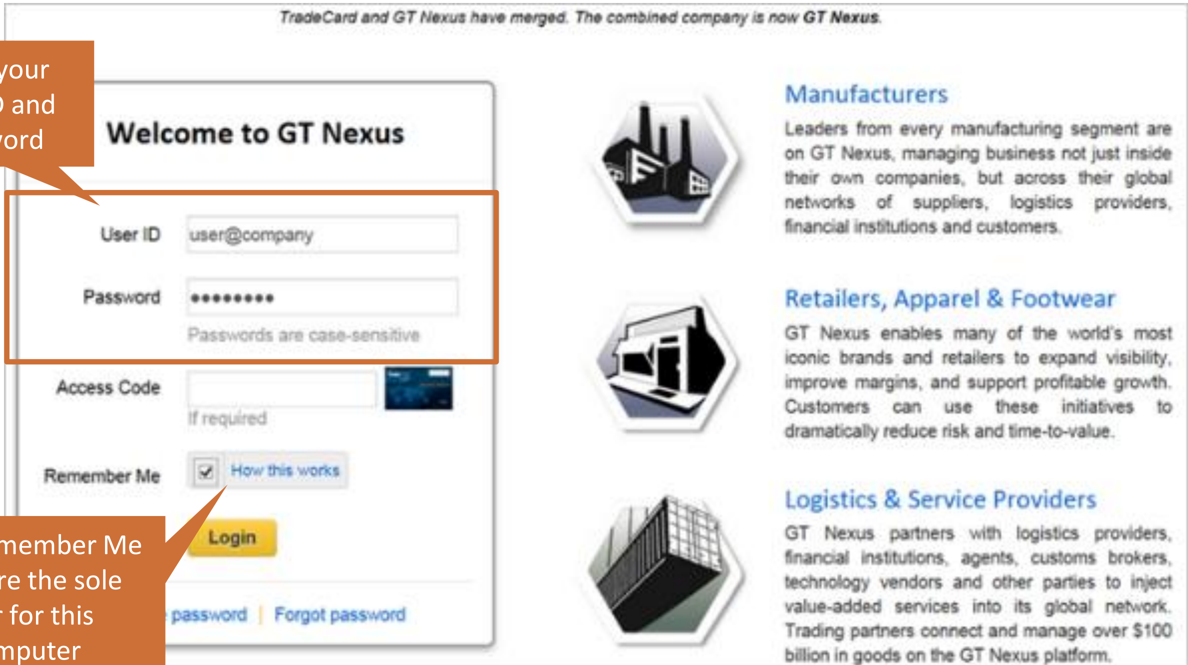
Before logging in, you may select the **System Status Information** link to check the system performance as well as any planned downtimes.

- Easily access and learn the dates of upcoming maintenance times
- Subscribe to **Status Updates** on **Twitter** to receive the latest alerts of the system's service status



How to Log into GT Nexus, continued

Enter your User ID and Password



Click Remember Me if you're the sole user for this computer

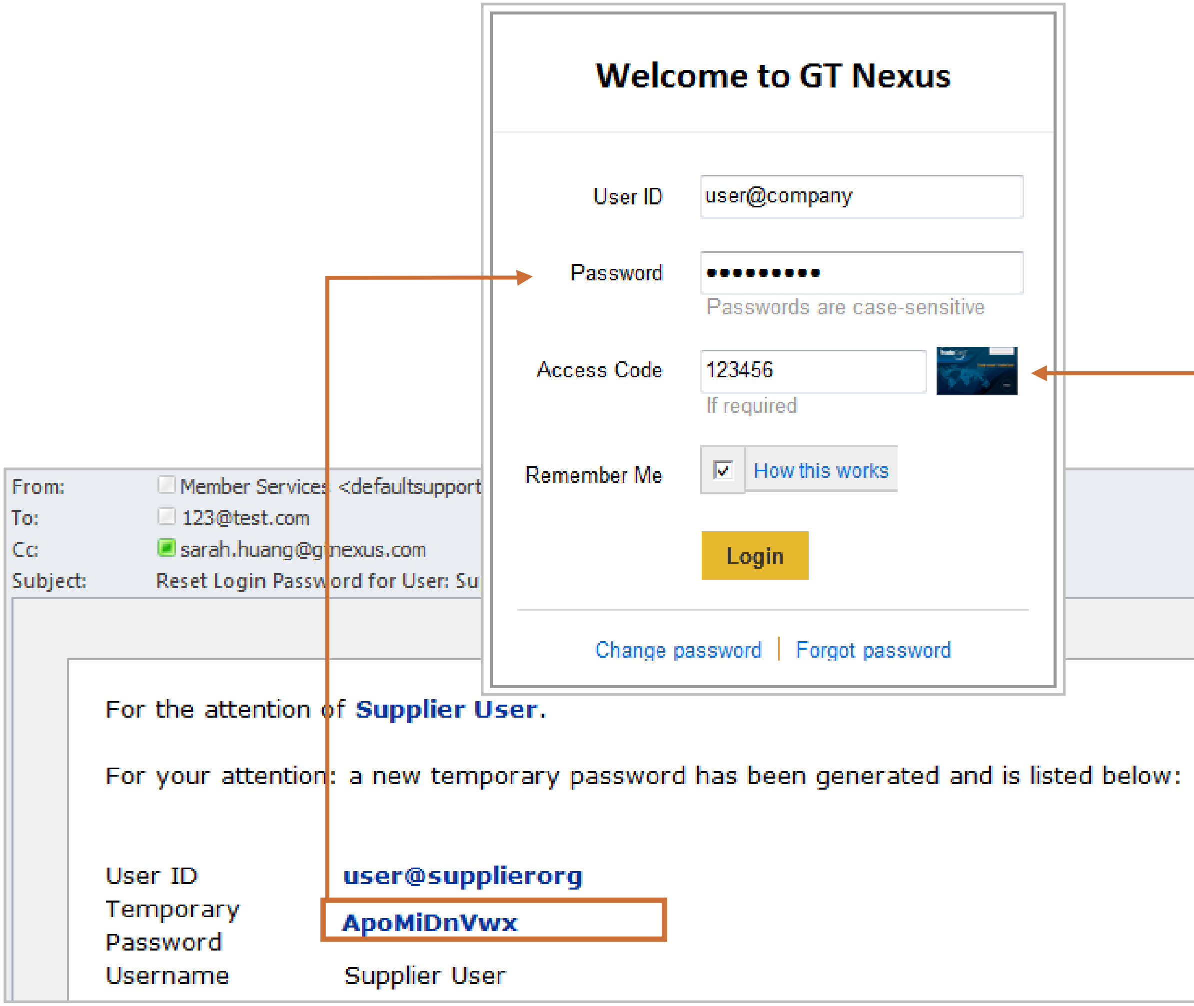
Note: The first time you log in to GT Nexus, your User ID will be your Password. You will be prompted to change your password at this time.

To log into GT Nexus, complete the following steps (continued).

1. Enter your **User ID** and **Password.**
2. Click **Remember Me** to save your **User ID**, if you're the sole user of this computer.
3. Click **Login**.

Note: An Access Code is not required for Williams-Sonoma.

About Password and Access Code

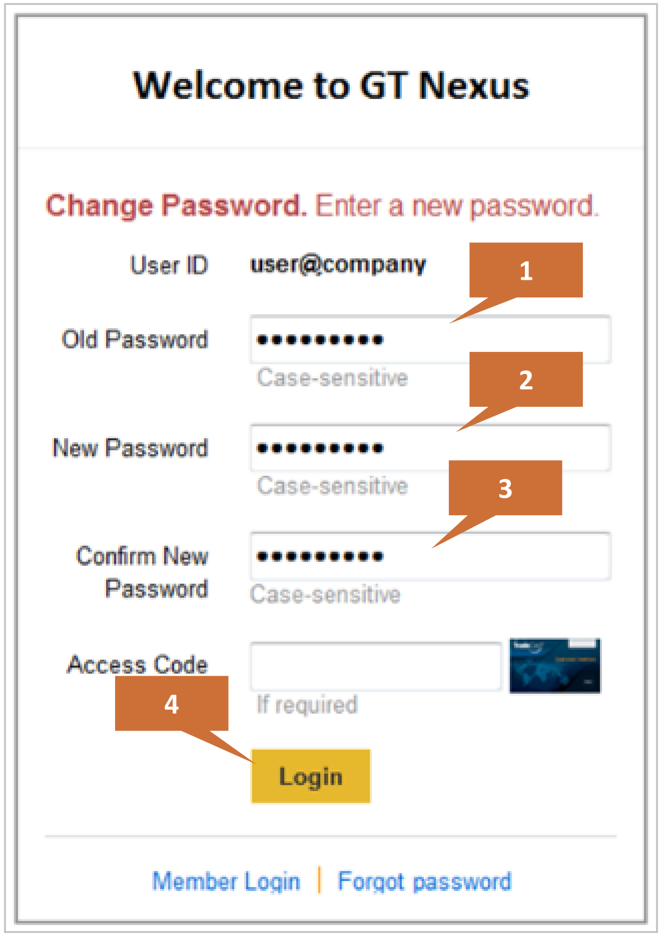


Note: Williams-Sonoma Vendors will not be required to use an Access Code for the use of GT Nexus PO Delivery & PO Collaboration.

If you are an existing member of GT Nexus and share your organizational account among other buyers who do require the Access Code, you will need to use it to log in for Williams-Sonoma transactions as well

Password: A system-generated password is delivered to the first-time user by email. Please check your email to get the temporary password.

How to change your password



To change your password, complete the following steps.

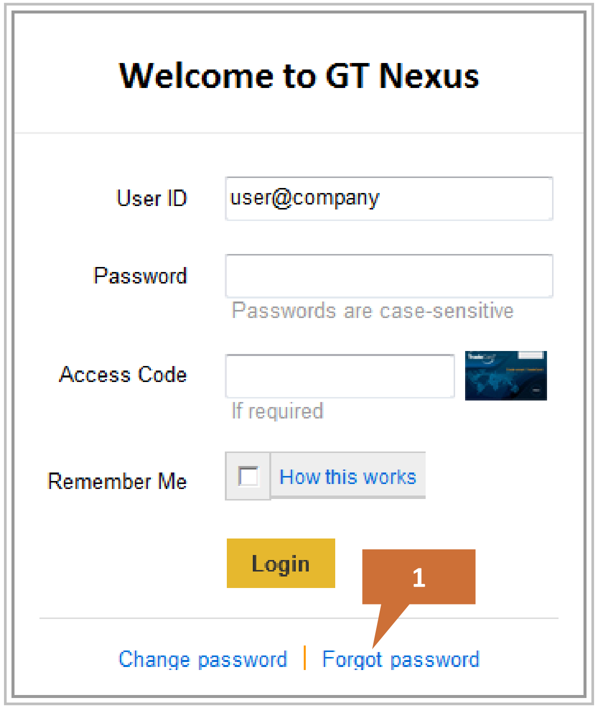
1. Enter your **Old Password** (this is your current password).
2. Enter your **New Password** (passwords must be at least 8 characters long).
3. Re-enter your new password in the **Confirm Password** field.
4. Click the **Login** button. The **User Home Page** will appear.

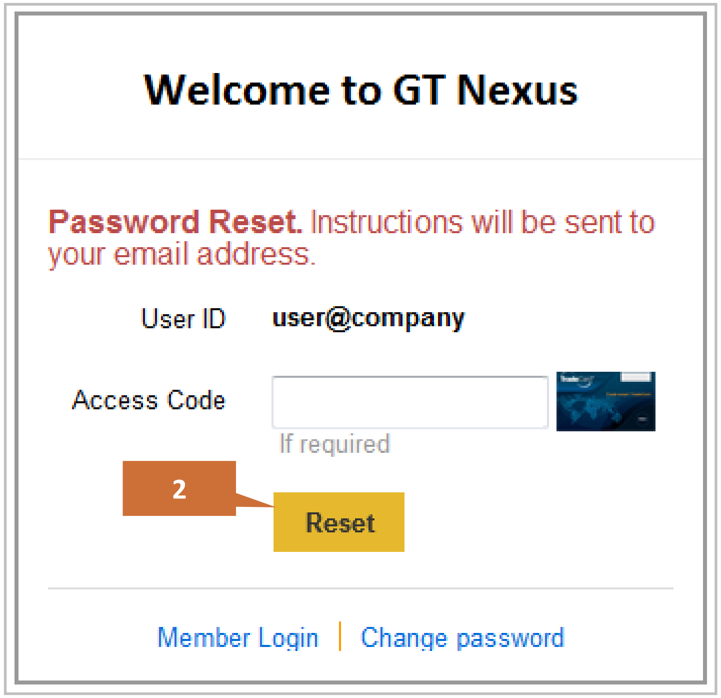
Password Rules:

- The password cannot be the same as the **User ID**.
- The **New Password** must be 8 characters or above and is case sensitive.
- Character sequence is not allowed, ex: abc, 123, xxx, 111)
- The password must have a combination of alpha and numeric/special characters.
- Passwords cannot be reused, the last 10 passwords are remembered.
- The account will lockout after 5 consecutive failed login attempts.
- The system requires all users to change their existing password on the first login and every **90 days thereafter**.
- 30 minutes of inactivity will require user to re-enter their password.
- Password aging, two (2) months of inactivity deactivates the account.
- Passwords are not displayed in the browser window.

Note: An Access Code is not required for Williams-Sonoma vendors.

How to reset your password



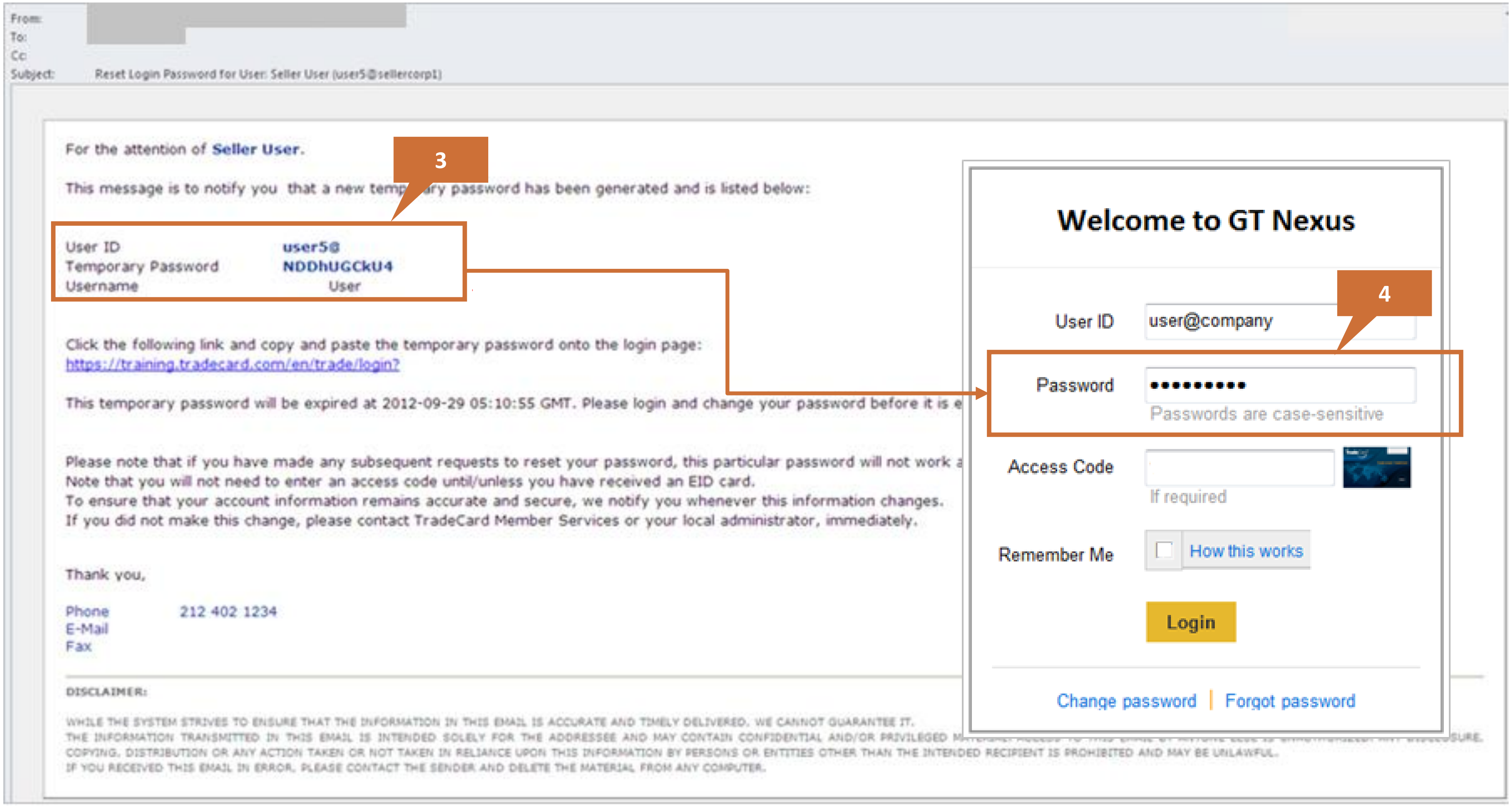


To reset your password, complete the following steps.

1. Click the **Forgot Password** link.
2. Click **Reset**. The **Password Reset** page displays.

> **Note**: An Access Code is not required for Williams-Sonoma vendors. If you have any issues resetting your password contact your GTN System Admin or the GTN Customer Service Team at service@gtnexus.com.

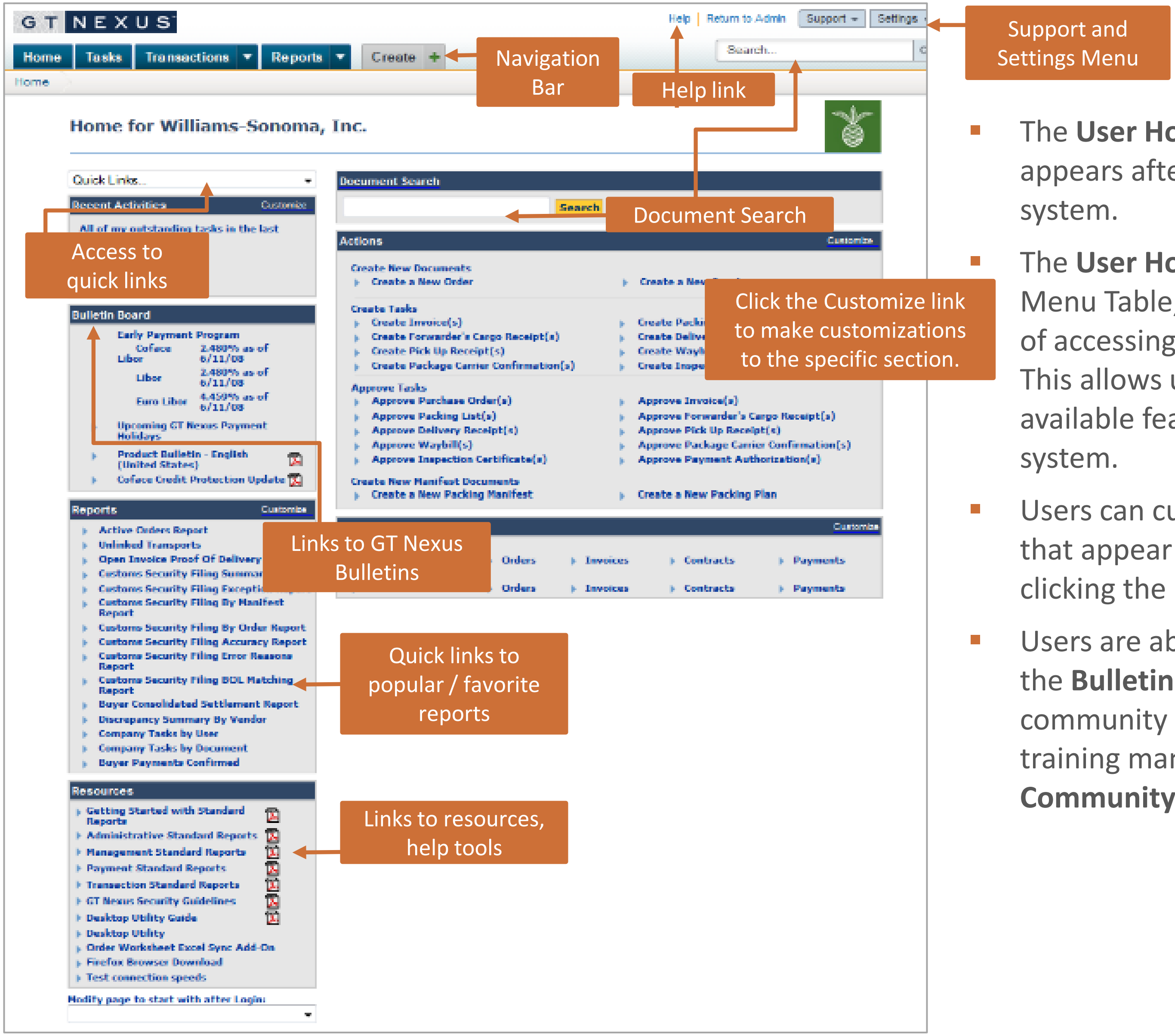
How to reset your password, continued



To reset your password, complete the following steps (continued).

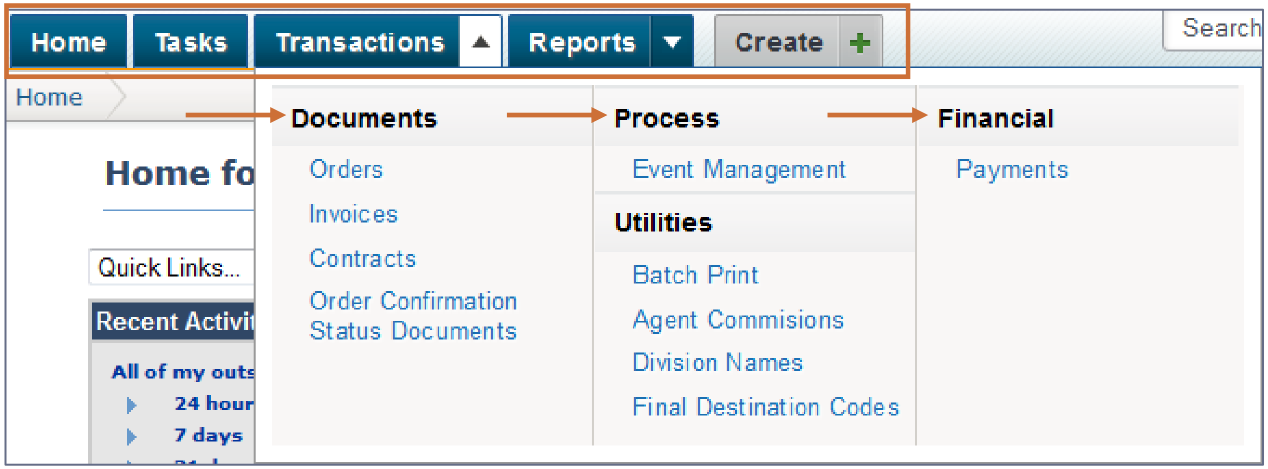
3. A system-generated **temporary password** will be emailed to your email account.
4. Use your **User ID** and **the temporary password** provided in the email to login to the system.

About the User Home Page



- The **User Home Page** is the first screen that appears after successfully logging into the system.
- The **User Home Page** contains the Main Menu Table, which provides another means of accessing the system's functionalities. This allows users to view a summary of the available features as you navigate the system.
- Users can customize some of the sections that appear on the **User Home Page** by clicking the applicable customize button.
- Users are able to access general updates in the **Bulletin Board** section as well as buyer community documents (such as buyer training manual, etc.) in the section of **Community Shared Attachments**.

About the Main Navigation Bar

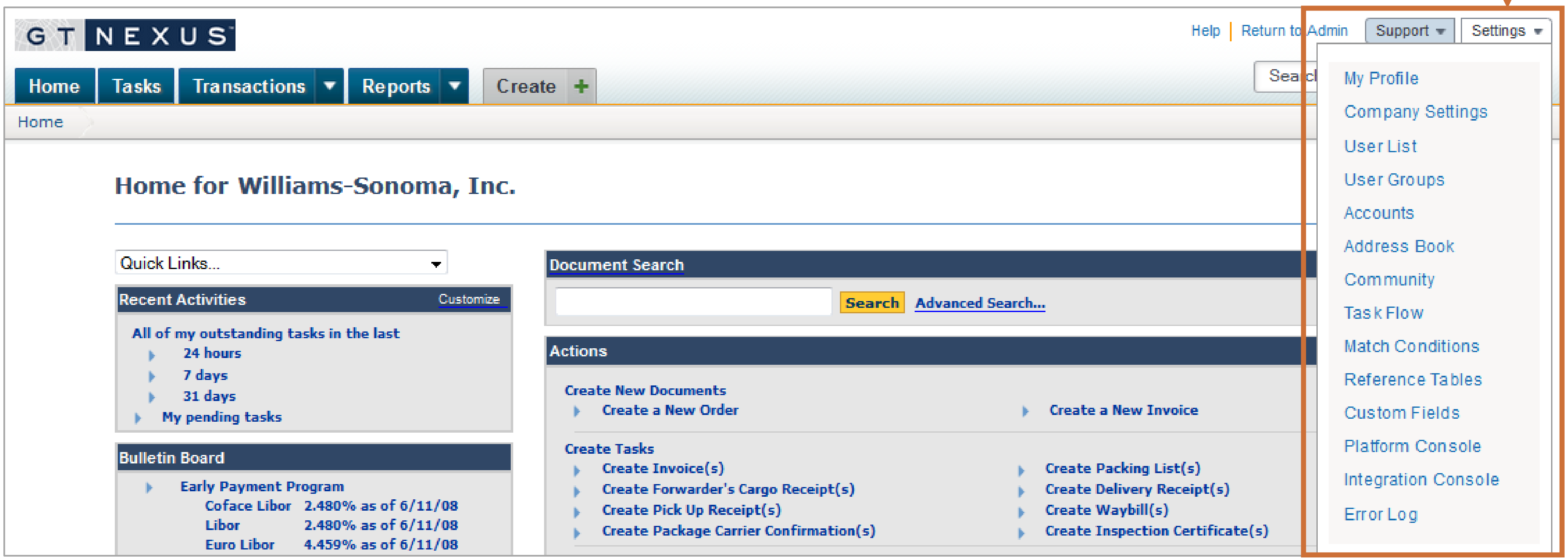


Use the home page to navigate to different areas of the Platform, view your tasks, run reports, search for documents on the platform, and access other resources. You can also customize the home page in a way that works best for you.

Note: The Navigation Bar is context sensitive. Users only see the features they have access to.

Tab	Description
Home	Contains quick-links to access the most common features of the system.
Tasks	Use this page to view and access work that has been assigned to you and your company.
Transactions	Use the dropdown on this tab to view documents or to track the status of your current transactions.
Reports	Use the dropdown on this tab to view available and scheduled reports.
Create	Start a new system transaction such as New Order. (WSI Vendors will not be creating documents)

About Settings



- **Settings**: The Settings tab in the upper-right corner of the GT Nexus page, is where you will find links to administrative functions such as set-ups, task flow setups, email subscriptions and much more.

Note: Some functions are restricted to Users with Administrator security rights.

About Tasks

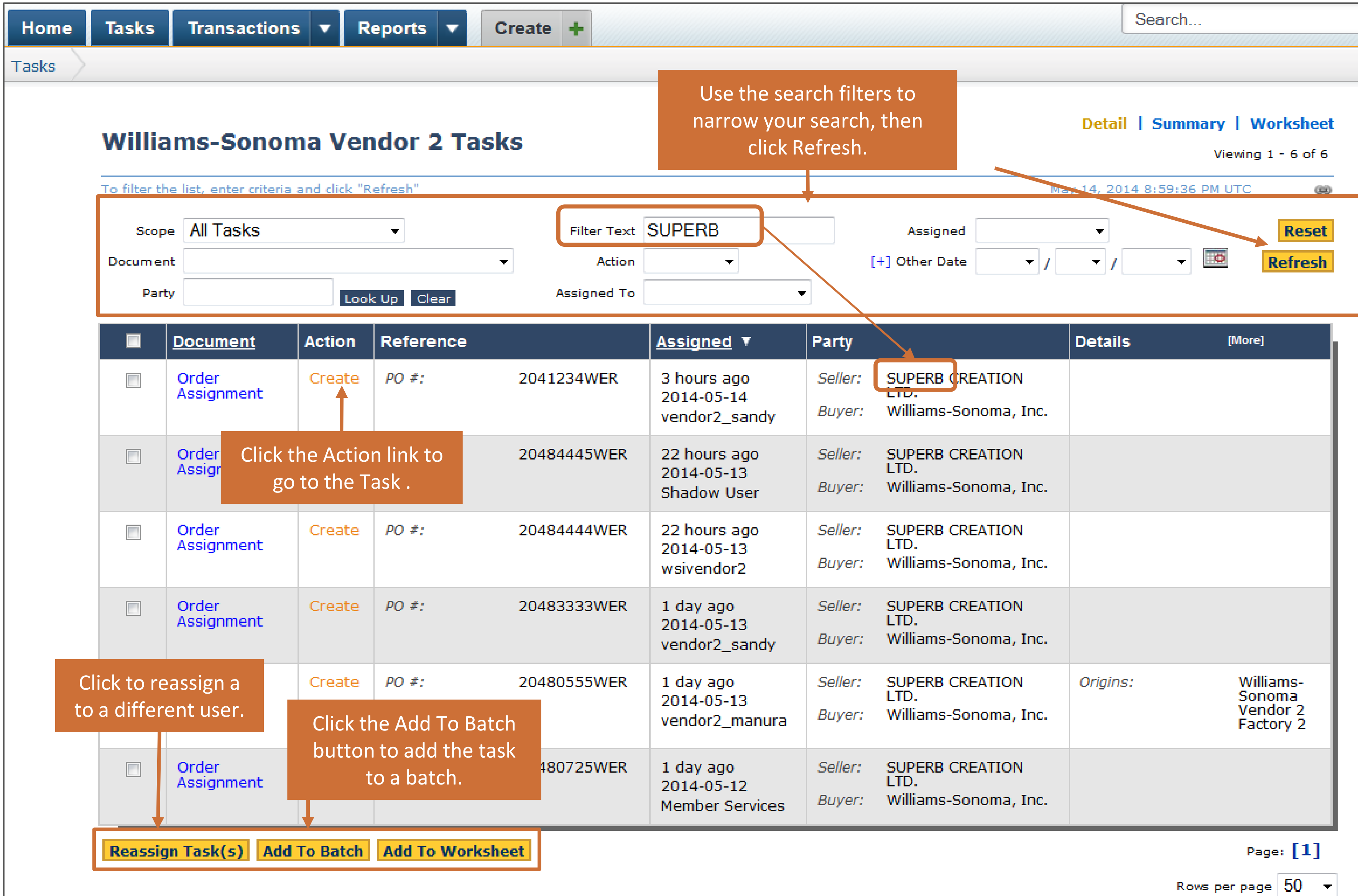
The Task List contains all documents that require some type of action. It displays all task assignments. You can use this list to find documents, view actions required, reference information such as order number, who the task is assigned to and when, buyer and seller name, and other document details. In addition, you can bookmark your favorite filters.

Vendors will only see Order Assignment Tasks in the Tasks List.

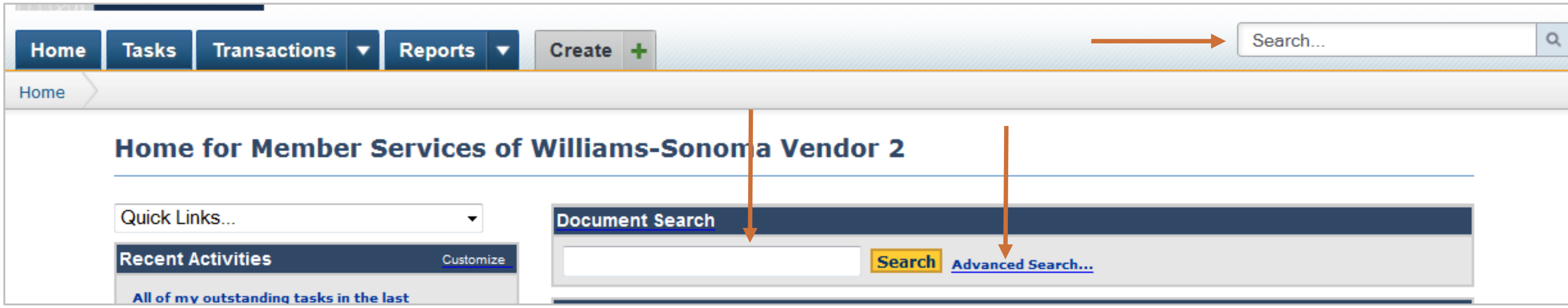
The Tasks page contains the following information:

- Filters that enable you to manipulate data in a list and produce new lists based on your specific criteria
- A task list that shows the document name, action, reference, assigned to, party, and other details
- Page navigation
- The number of rows to show in the list

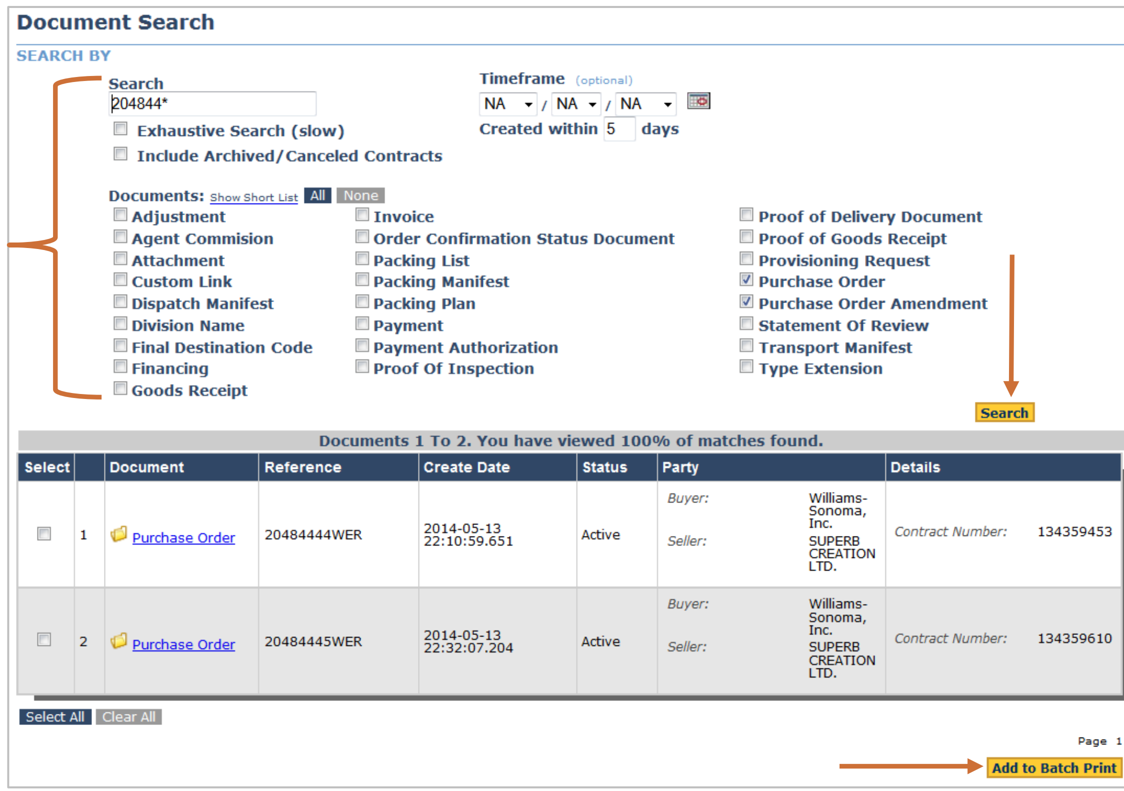
About Tasks, continued



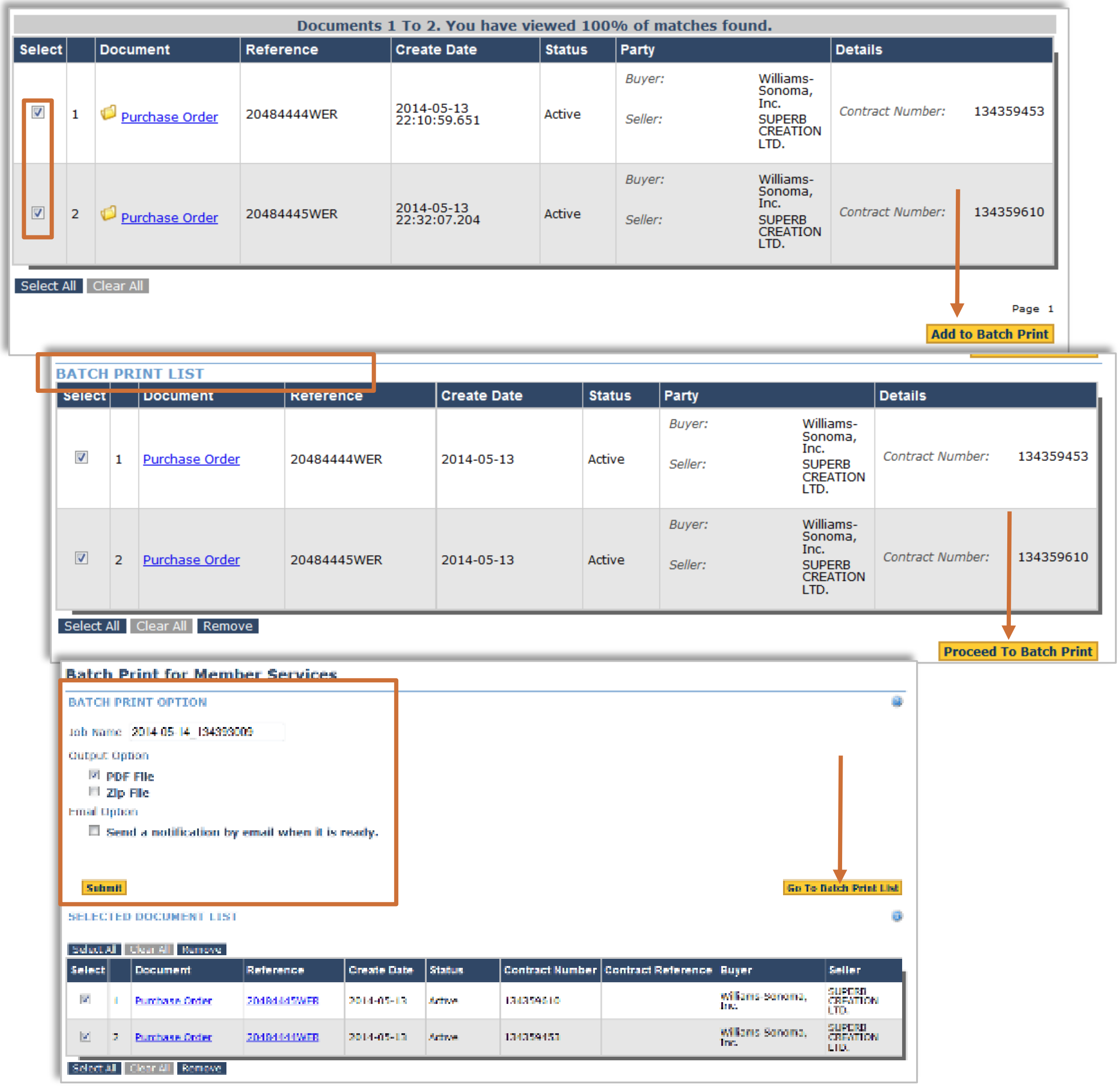
How to Use Search Options



- Use the **Document Search** option to search for any document saved on the GT Nexus Platform. For WSI transactions only the Order is available on GT Nexus.
- You can also use **Search** or the **Advance Search** link to search for documents based on your specific criteria.
- You may also batch print Orders in PDF from the Document Search option.



How to Use the Batch Print Option



1. From the **Document Search** screen, select the orders you want to add to the batch print list.
2. From the **Batch List**, select the orders you want to print in PDF.
3. From the **Batch Print Screen** select the option to **Print in PDF** and **Send a Notification by email** when it is ready. Click **Submit**

Purchase Orders and Amendments

Procurement Phase

- Procurement process email notification
- How to search for a purchase order
- How to search for a purchase order amendment
- How to use notes editor
- How to use document history
- Canceled and Closed Purchase Orders
- About the Purchase Order Folder

Purchase Orders (PO) and Purchase Order Amendments

- All Purchase Order and Order Amendments will originate with Williams-Sonoma.
- Upon receiving a Purchase Order or Purchase Order Amendment, the document will run through a series of validations to ensure all required elements of the order document meet both GTN core and WSI custom requirements.
- If any validation errors are found, the Order document will be held in a "New" status until a corrected file is received from WSI. Order documents in a "New" status are not visible to the vendor nor available in the PO Collaboration worksheet.
- PO/POAs which pass validation will be auto activated on behalf of WSI and the assigned vendor. The document status will reflect "Active".
- PO/POA in an "Active" status are both visible to the vendor and available within the PO Collaboration Worksheet.
- Vendors are requested to subscribe to GT Nexus email notifications and/or utilize scheduled reports to have visibility to when order or order amendments are activated on GT Nexus.

Note: Purchase Order and SKU Numbers

- The WSI PO System number will be used as the Purchase Order number in GT Nexus.
- The WSI SKU number on the PO will be used as the Buyer Item number in GT Nexus.

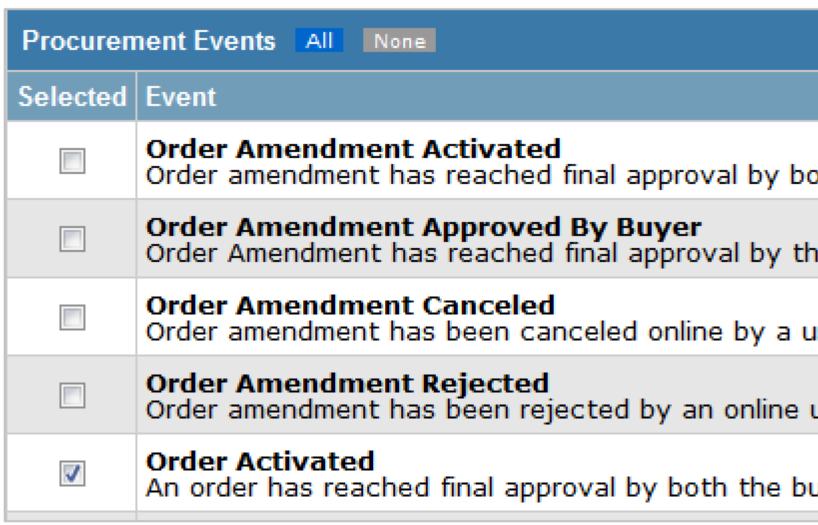
Purchase Orders (PO) and Purchase Order Amendments

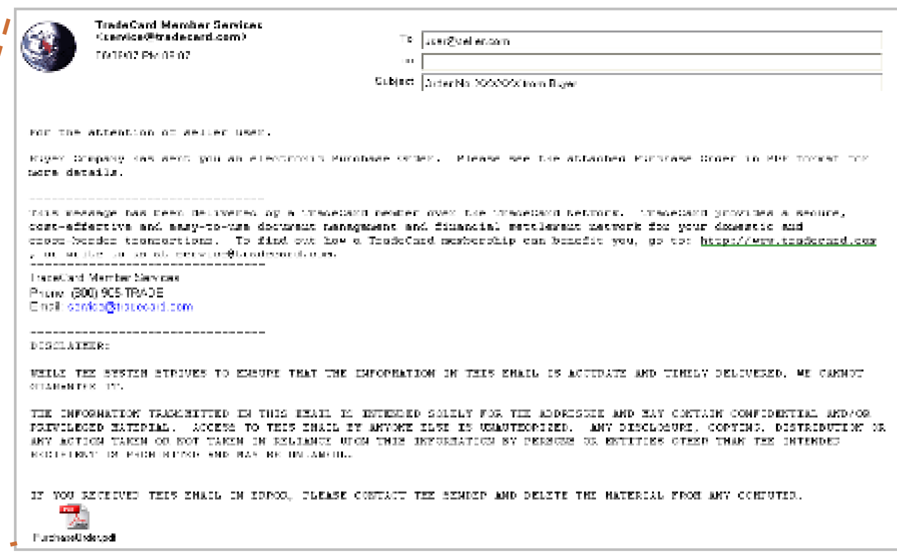
- A Purchase Order Amendment (POA) is a change(s) to an existing Purchase Order (PO).
- If WSI reassigns an existing order to a different Vendor, the original PO will be canceled along with any history. It will no longer be visible to the original vendor. A new PO will be created and assigned to the new vendor.
- Vendors will not have security rights to amend WSI Purchase Orders.
- PO Lines whose quantity is amended to zero will be set to "cancelled" and removed from PO Collaboration.
- A PO PDF is available, Users may view and print the order PDF online from the Order view, or elect to receive an email with the Order PDF from the email subscriptions.
- WSI has designated the following fields as critical. Vendors are required to use PO Collaboration to confirm changes when a POA is issued affecting any of the critical fields.

Critical Fields:			
Line Item Quantity	**MC – Master Case**	**Origin Shipping point**	**Ship Window Start Date & End Date**
Retail Price	**Loading Port**	**Country of Origin**	
PO ETA	**Item Unit Price**	**Short Description**	
Ship Method	**DL – Distribution Lot**	**Invoice Description**	

Subscribing to the Order and Order Amendment Email Notification

- All GT Nexus Users have access to an event driven email subscription service which can be configured from the User profile.
- Vendors are requested to subscribe to the **Order Activated** and **Order Amendment Activated** email subscription to receive an email when WSI issues a new PO or a POA which had a change to one or more critical fields.
- Select the option for the email to contain a PDF of the order document.
- The advanced match condition engine may be used to tailor when these email notifications are generated. For example an email advising that a POA has been activated may be limited to only occur when one or more WSI defined critical fields are changed. **(Contact your GT Nexus Service Center for assistance setting up Match Conditions)**





Security Rights for Purchase Order Management

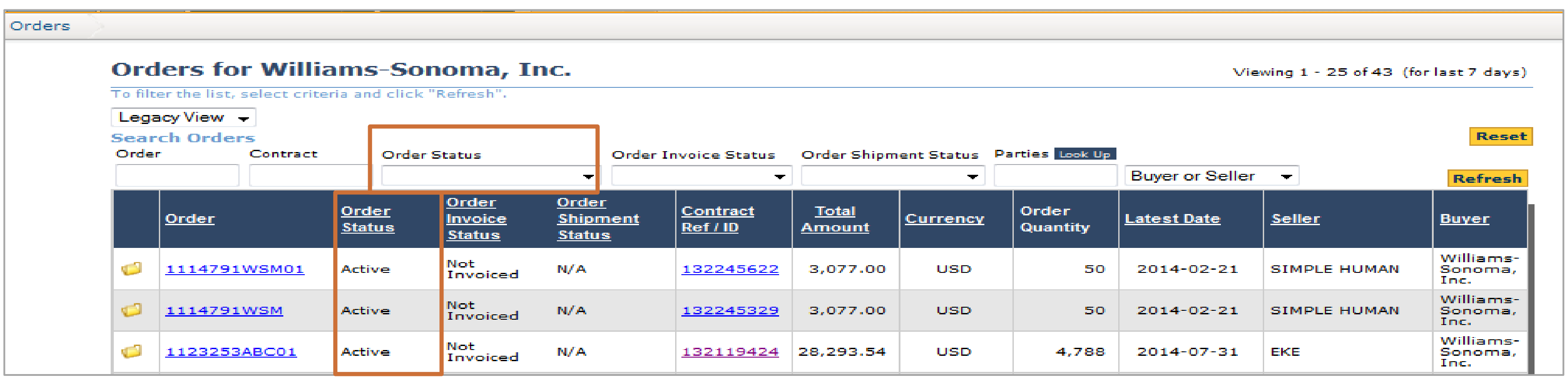
- All Williams-Sonoma Purchase Order and Order Amendments are auto approved and activated on behalf of the Vendor.
- Vendors are not permitted to initiate any Order Changes
- NO Security Rights are issued for Purchase Order Management

Note: If a vendor is transacting on GT Nexus with another buyer which requires security rights to manually approve or amend purchase orders, those rights may exists without affecting the WSI workflow.

About the Purchase Order Status

The **Order Status** states the current state of the Purchase Order. Only those status in red are applicable to WSI transactions.

Status	Description
New	The Purchase Order is not yet approved by the buyer.
Active	The Purchase Order is approved by both buyer and vendor.
Canceled	The Purchase Order no longer requires to be executed by the vendor. A Purchase Order can only be cancelled by the Buyer either prior to becoming Active or after. Canceling a PO will create a “Cancelled Version” of the document.
Pending Amendment	The Purchase Order was changed and is in process and not yet approved by the buyer and/or supplier. This is not applicable to WSI Orders as they are auto approved.
Closed	The Purchase Order has reached the end-of-life, it has been fulfilled (partially or in full). Only the Buyer may Close an Order. The Order Folder status will reflect Closed.


Orders

Orders for Williams-Sonoma, Inc.

Viewing 1 - 25 of 43 (for last 7 days)

To filter the list, select criteria and click "Refresh".

Legacy View

Search Orders

Order | Contract | Order Status | Order Invoice Status | Order Shipment Status | Parties Look Up | Buyer or Seller

Reset

Refresh

	Order	Order Status	Order Invoice Status	Order Shipment Status	Contract Ref / ID	Total Amount	Currency	Order Quantity	Latest Date	Seller	Buyer
	1114791WSM01	Active	Not Invoiced	N/A	132245622	3,077.00	USD	50	2014-02-21	SIMPLE HUMAN	Williams-Sonoma, Inc.
	1114791WSM	Active	Not Invoiced	N/A	132245329	3,077.00	USD	50	2014-02-21	SIMPLE HUMAN	Williams-Sonoma, Inc.
	1123253ABC01	Active	Not Invoiced	N/A	132119424	28,293.54	USD	4,788	2014-07-31	EKE	Williams-Sonoma, Inc.

About the Order Folder

Icon / Link Title	Located on the	Displays
Purchase Order Folder Icon	Order List	Contract page
Purchase Order Number Icon 1123253ABC01	Order List	Purchase Order – Preview page
Purchase Order Folder /Number link Orders > Order Folder UK-X-TEST-00004	Breadcrumb trail	Contract page

Use the **Order Folder** to view your contract, that includes all the documents and details related to a transaction. The **Contract** page is displayed when you click the **Oder Folder** icon .

Access the **Purchase Order Amendment** document via the **Order Folder**.

1. Scroll to the **Documents** section.
2. Click the **Purchase Order Amendment** link.

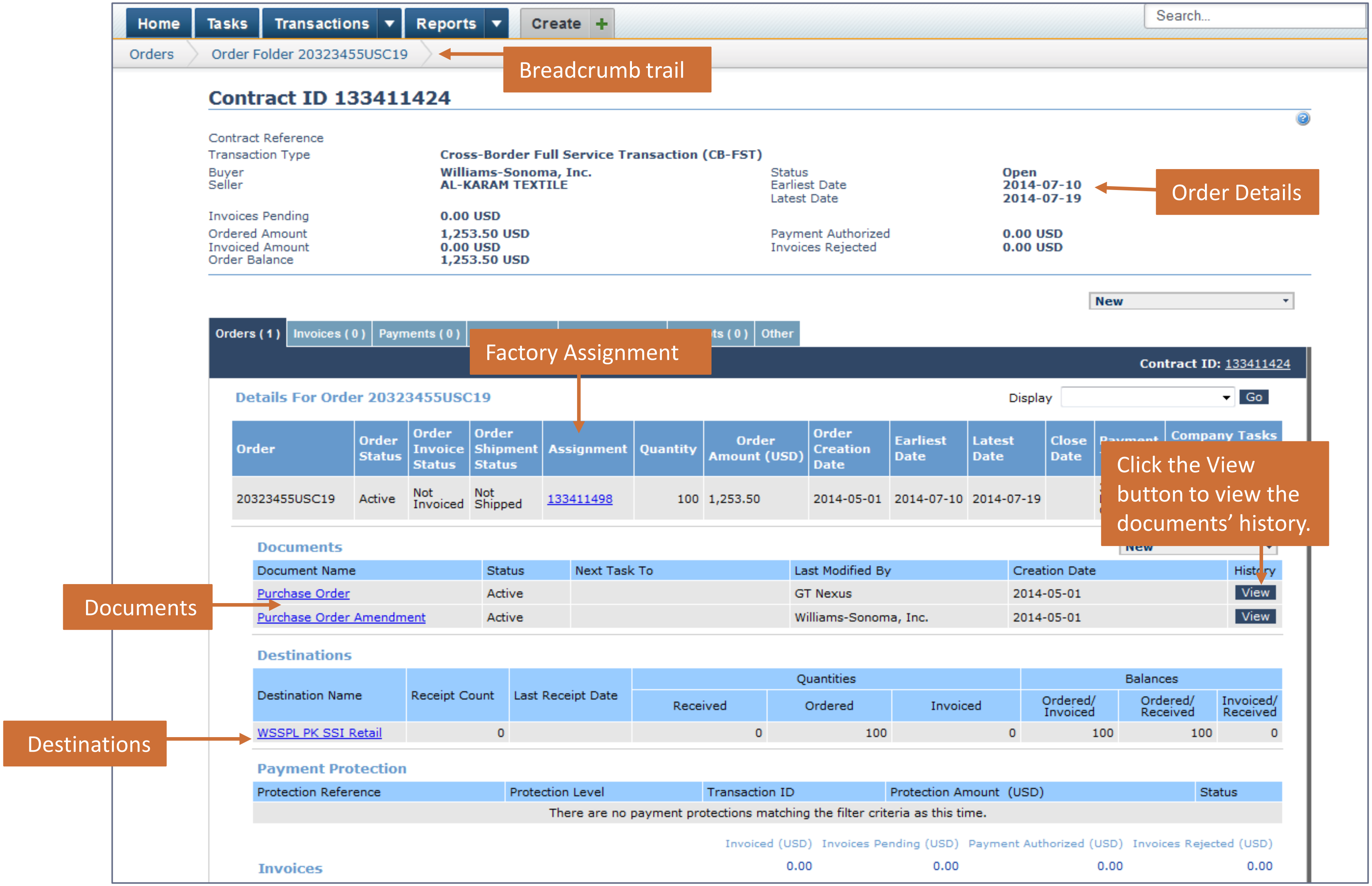
Use the Order Folder to access…

- Purchase Order Details
- Documents
- Destinations

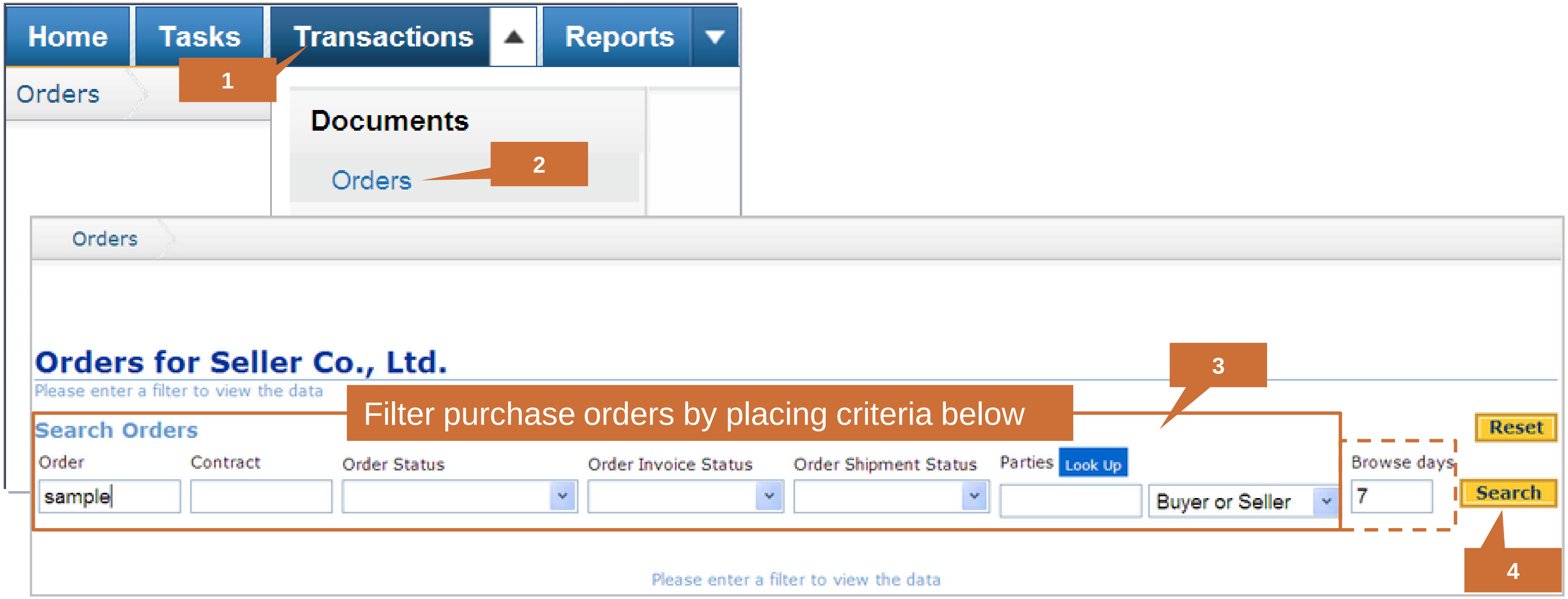
To view documents related to the Order, simply click on the document link you wish to view.

Note: WSI does not use the Contract Number.

Order Folder View



How to search for a purchase order (PO)

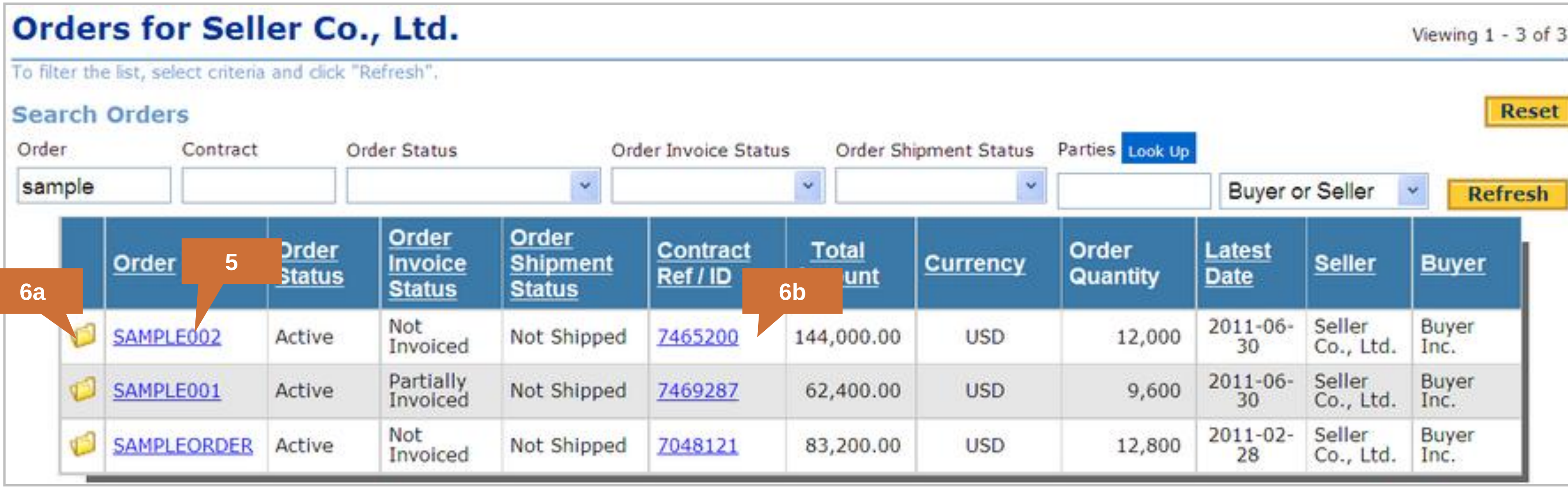


To find a PO, complete the following steps.

1. Click the **Transactions** tab.
2. Click **Orders** under the **Transactions** tab.
3. You may look for the designated POs by typing the Order Number, Contract Number or search by Order/Shipment Status etc. from filters and then click **Search** to retrieve the requested data.
4. If no filter is set, you can simply click **Search** button next to the **Browse days** field and the orders from the past 7 days will be shown on the webpage.

Tips: Change the default value of **7** on the **Browse days** field to whatever timeframe you desired, e.g. **30,** then click **Search** to view purchase orders received in last 30 days.

How to search for a purchase order (PO), continued

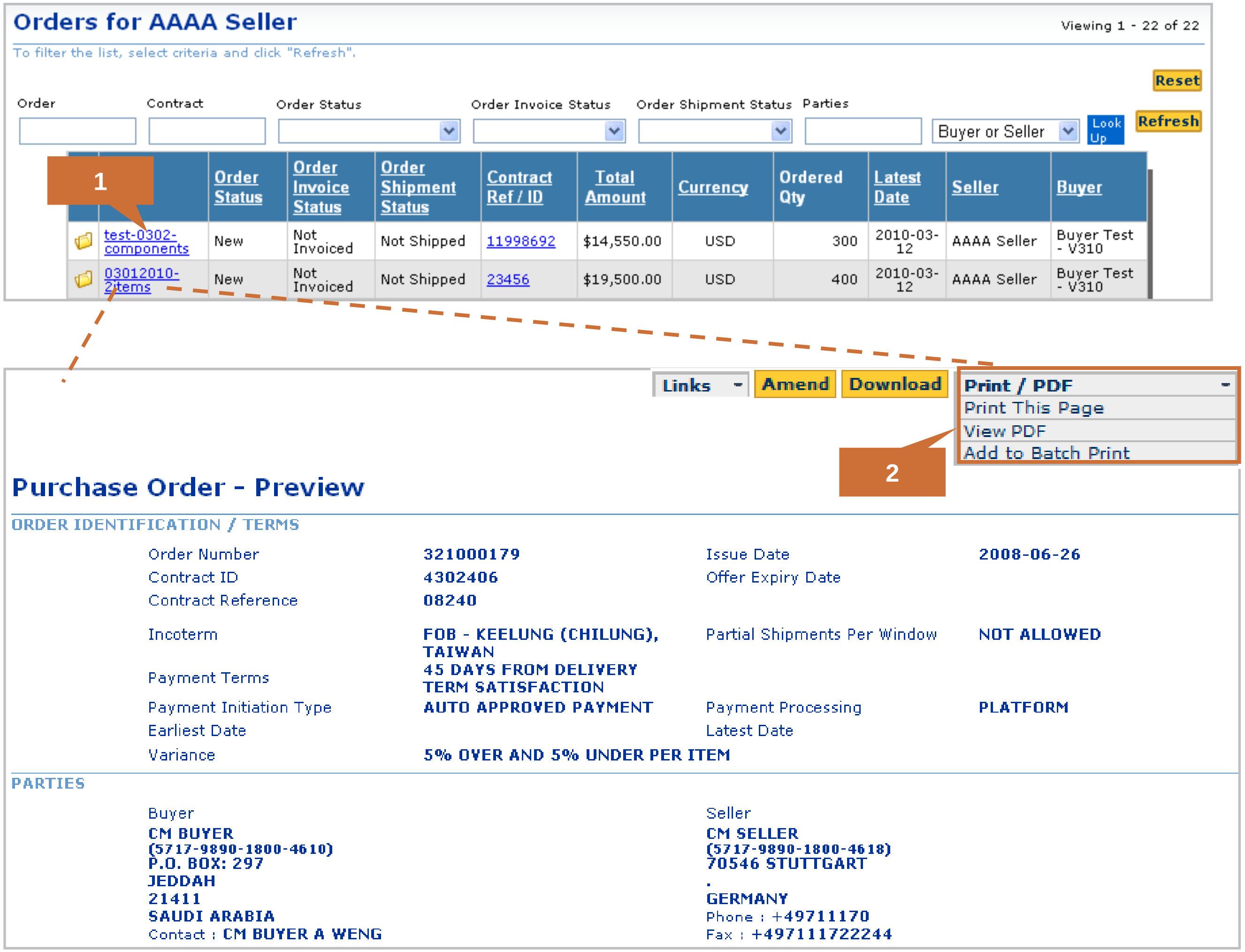


5. Click the **PO number** to go into the PO preview page.
6. Or click the **Contract Ref / ID** or the folder icon to access the order folder screen.

Note:

- Transaction filtering feature:
  You can select criteria for filtering transactions. For example, you may enter a PO number or key word in the **Order** field and then click **Refresh** to search for a specific order. Use the * for the wildcard search. For example, if the PO is 03509990, and you don’t type in the leading 0 you won’t get a result. If you enter *3509 you would return the PO with the leading 0.
- Order Status:
  - **Active**:- PO approved and activated on GT Nexus
  - **Cancelled**:- PO is cancelled on GT Nexus

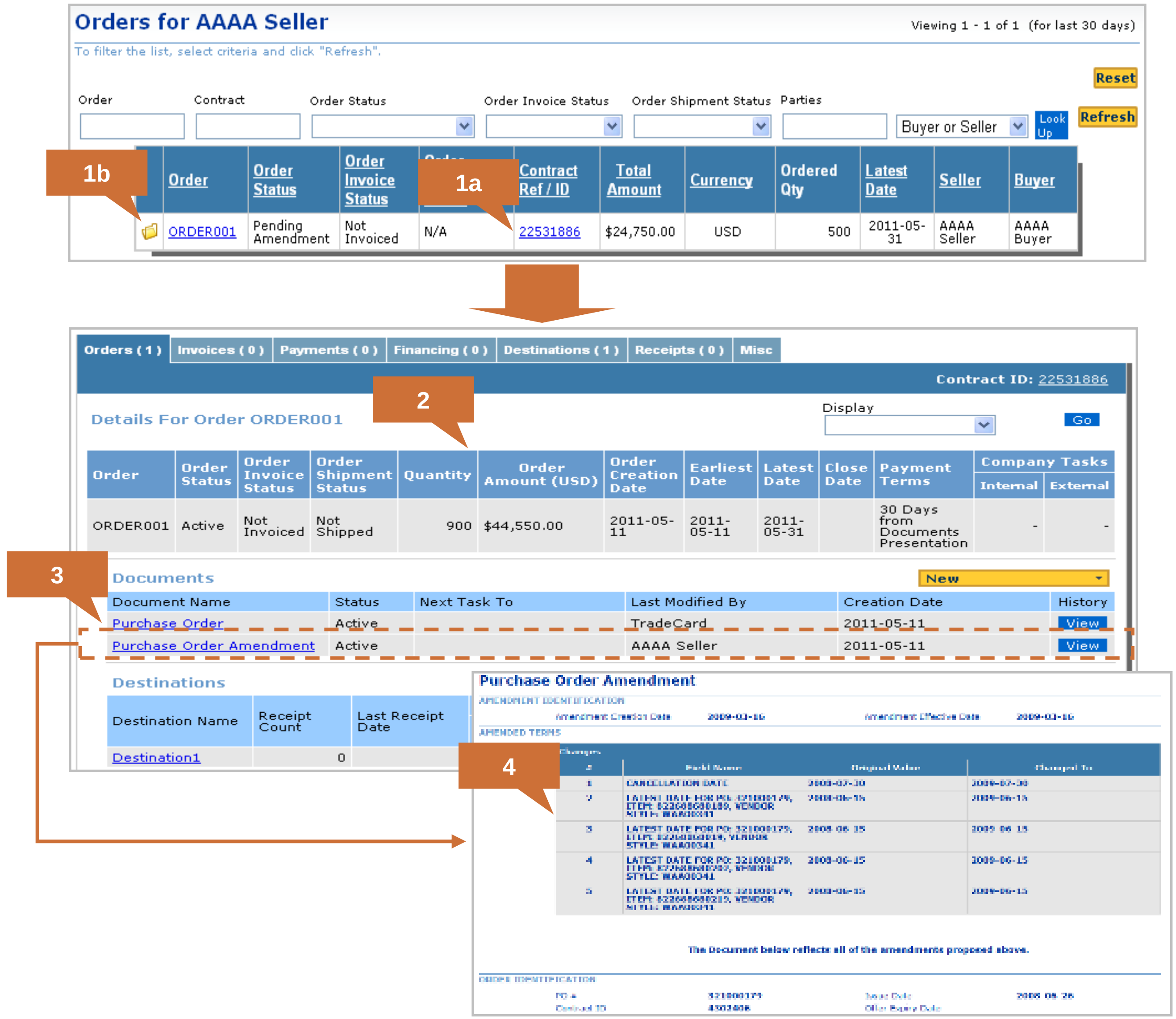
How to Review a Purchase Order



To review a PO, complete the following steps.

1. Click an **Order** number to go to the PO page.
2. There, you will see options given to print the PO page or **download it as a PDF** by selecting the **Print/PDF** button.

How to Find a Purchase Order Amendment

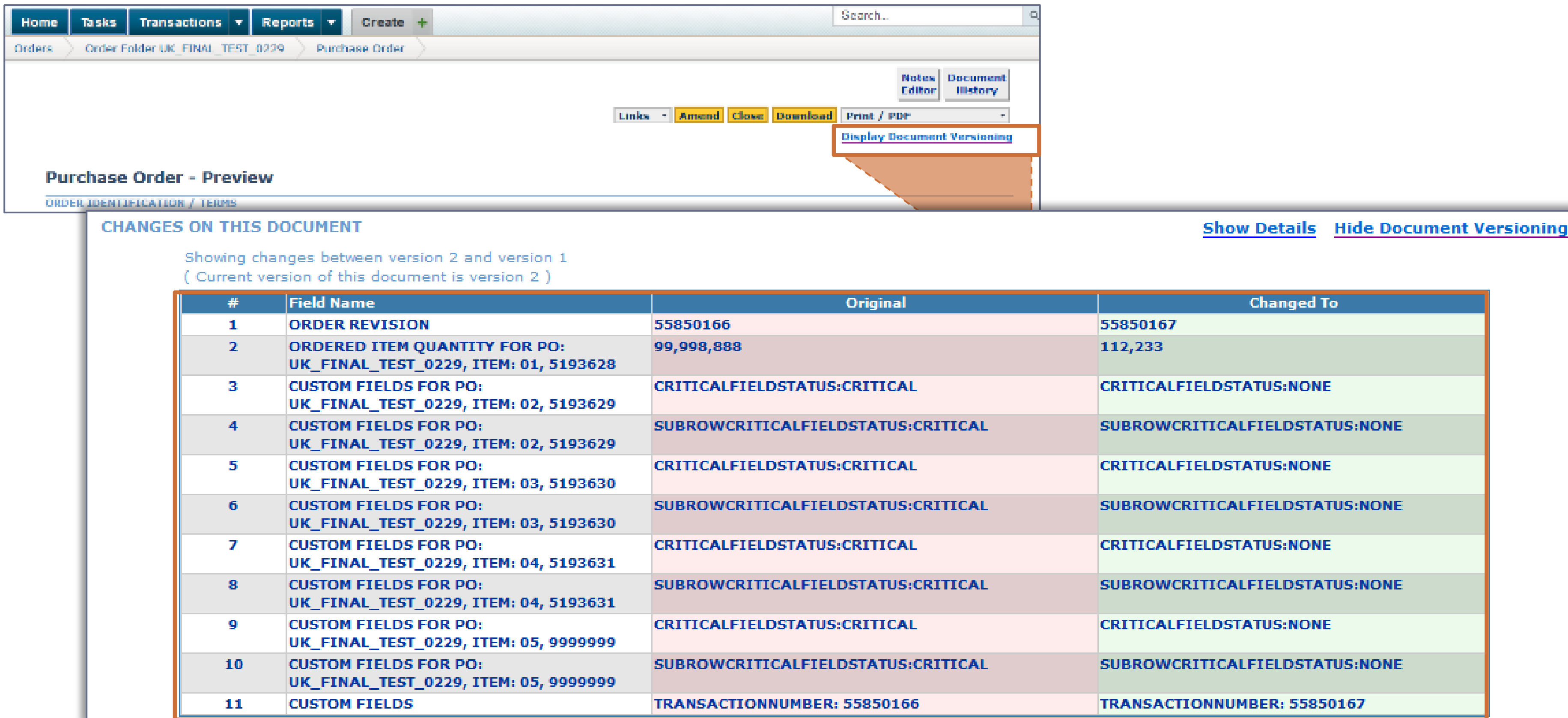


To find a POA, complete the following steps.

1. Click the **Contract Ref/ID** or ‘ ’ of the order to access the order folder screen.
2. The PO and PO amendment documents will be stored in the order details table.
3. Each PO amendment will be stored with the creation date and processing history.
4. Click the **Purchase Order Amendment** link to go to the **Amendment preview** page.

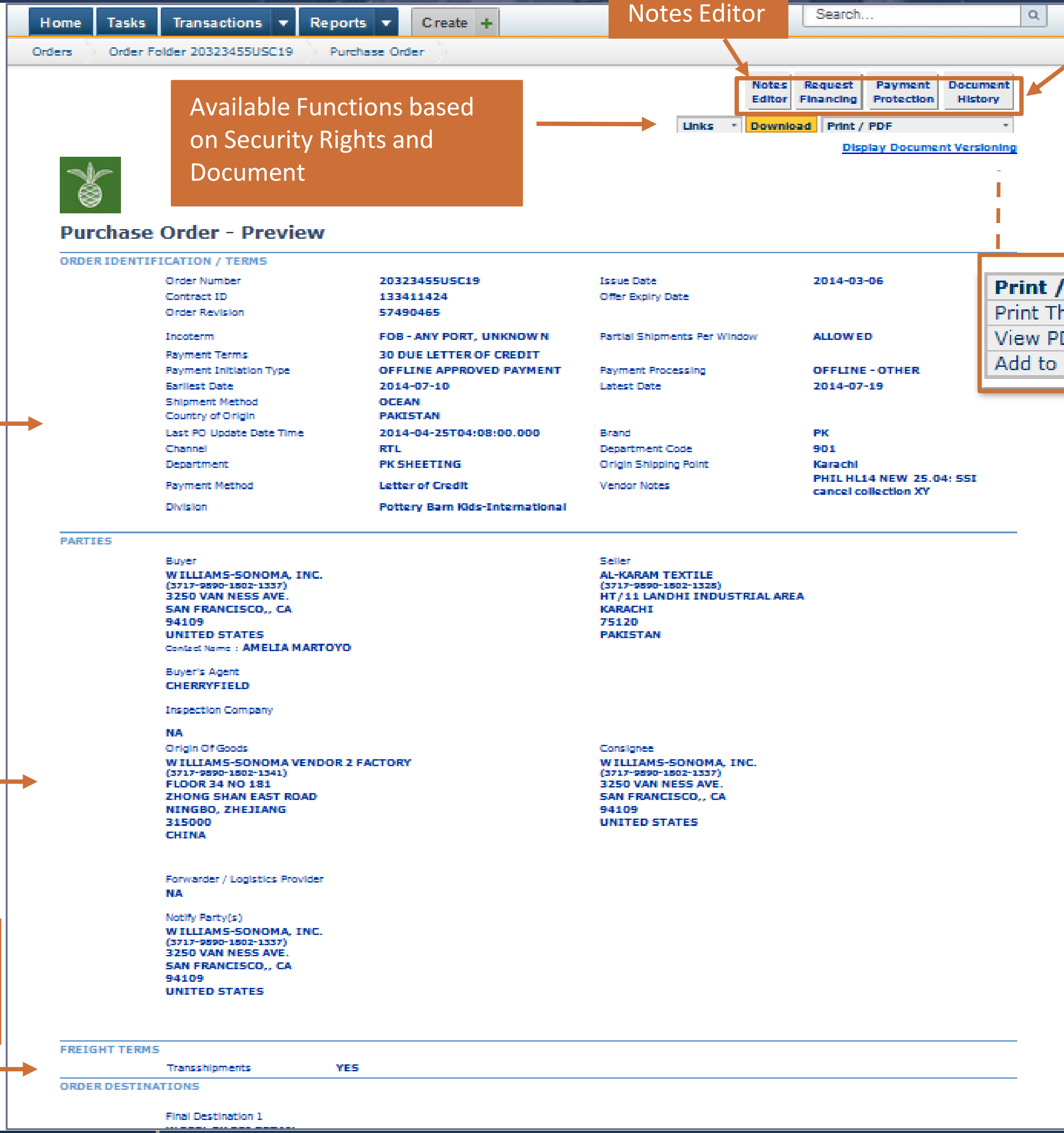
About Document Versioning

The Display Document Versioning link provides a list of all the changes made to a Purchase Order. It provides the name of the field changed, the Original value and the Changed To value. The Show Details link provides additional information on the change, Party that made the change and the version the change was made to.



#	Field Name	Original	Changed To
1	ORDER REVISION	55850166	55850167
2	ORDERED ITEM QUANTITY FOR PO: UK_FINAL_TEST_0229, ITEM: 01, 5193628	99,998,888	112,233
3	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 02, 5193629	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
4	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 02, 5193629	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
5	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 03, 5193630	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
6	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 03, 5193630	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
7	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 04, 5193631	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
8	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 04, 5193631	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
9	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 05, 9999999	CRITICALFIELDSTATUS:CRITICAL	CRITICALFIELDSTATUS:NONE
10	CUSTOM FIELDS FOR PO: UK_FINAL_TEST_0229, ITEM: 05, 9999999	SUBROWCRITICALFIELDSTATUS:CRITICAL	SUBROWCRITICALFIELDSTATUS:NONE
11	CUSTOM FIELDS	TRANSACTIONNUMBER: 55850166	TRANSACTIONNUMBER: 55850167

Quick View of a WSI Purchase Order on GT Nexus


Home | Tasks | Transactions | Reports | Create

Search...

Orders > Order Folder 20323455USC19 > Purchase Order

Notes Editor | Request Financing | Payment Protection | Document History

Links | Download | Print / PDF

Display Document Versioning

Purchase Order - Preview

ORDER IDENTIFICATION / TERMS

Order Number	20323455USC19	Issue Date	2014-03-06
Contract ID	133411424	Offer Expiry Date	
Order Revision	57490465		
Incoterm	FOB - ANY PORT, UNKNOWN	Partial Shipments Per Window	ALLOWED
Payment Terms	30 DUE LETTER OF CREDIT		
Payment Initiation Type	OFFLINE APPROVED PAYMENT	Payment Processing	OFFLINE - OTHER
Earliest Date	2014-07-10	Latest Date	2014-07-19
Shipment Method	OCEAN		
Country of Origin	PAKISTAN		
Last PO Update Date Time	2014-04-25T04:08:00.000	Brand	PK
Channel	RTL	Department Code	901
Department	PK SHEETING	Origin Shipping Point	Karachi
Payment Method	Letter of Credit	Vendor Notes	PHIL HL14 NEW 25.04: SSI cancel collection XY
Division	Pottery Barn Kids-International		

PARTIES

Buyer
WILLIAMS-SONOMA, INC.
(3717-9890-1802-1337)
3250 VAN NESS AVE.
SAN FRANCISCO,, CA
94109
UNITED STATES
Contact Name : AMELIA MARTOYO

Seller
AL-KARAM TEXTILE
(3717-9890-1802-1325)
HT/11 LANDHI INDUSTRIAL AREA
KARACHI
75120
PAKISTAN

Buyer's Agent
CHERRYFIELD

Inspection Company
NA

Origin Of Goods
WILLIAMS-SONOMA VENDOR 2 FACTORY
(3717-9890-1802-1341)
FLOOR 34 NO 181
ZHONG SHAN EAST ROAD
NINGBO, ZHEJIANG
315000
CHINA

Consignee
WILLIAMS-SONOMA, INC.
(3717-9890-1802-1337)
3250 VAN NESS AVE.
SAN FRANCISCO,, CA
94109
UNITED STATES

Forwarder / Logistics Provider
NA

Notify Party(s)
WILLIAMS-SONOMA, INC.
(3717-9890-1802-1337)
3250 VAN NESS AVE.
SAN FRANCISCO,, CA
94109
UNITED STATES

FREIGHT TERMS

Transshipments YES

ORDER DESTINATIONS

Final Destination 1

Notes Editor

Document History

Available Functions based on Security Rights and Document

Order Identification / Terms section

Parties section

Freight and Order Destination sections

Print / PDF
- Print This Page
- View PDF
- Add to Batch Print

Print/PDF options

Quick view of a WSI PO on GT Nexus continued…

Line Item section. Details the order.

LINE ITEMS

Line #	Buyer Item #	Short Description	Ordered Item Quantity	Unit Price	Cost (USD)
01	3416732	SANTA FLN CSE STD	10 EACH	8.00	80.00

Item Status	OPEN	SKU #	3416732
Destination	WSSPL PK SSI Retail	Qty per Inner Pack	4
Earliest Date	2014-07-10	Qty per Outer Pack	4
Latest Date	2014-07-19		
Vendor's Part Number	VP		
Event Code	HL14 1009		
Invoice Description	PILLOWCASE: 100% COTTON FLANNEL WOVEN PRINTED NAPPED NO EMBELLISHMENT		
HTS1 Number	6302217010		
HTS1 Duty Percent	2.50		
HTS1 Approved Date	20140225		
HTS1 Notes	2.50%		
Critical Field Status	CRITICAL		
OCSDUpdated	NO		
ETA Final Destination Date	2014-08-11		
Do Not Deliver Before Date	2014-07-22		
Retail Price	14.5		

Line #	Buyer Item #	Short Description	Ordered Item Quantity	Unit Price	Cost (USD)
02	3416690	SANTA FLANNEL STD SHAM	10 EACH	8.00	80.00

Item Status	OPEN	SKU #	3416690
Destination	WSSPL PK SSI Retail	Qty per Inner Pack	4
Earliest Date	2014-07-10	Qty per Outer Pack	4
Latest Date	2014-07-19		
Vendor's Part Number	VP		
Event Code	HL14 1009		
Invoice Description	SHAM: 100% COTTON WOVEN		
HTS1 Number	6304920000		
HTS1 Duty Percent	6.30		
HTS1 Approved Date	20140330		
HTS1 Notes	6.30%		
Critical Field Status	CRITICAL		
OCSDUpdated	NO		
ETA Final Destination Date	2014-08-11		
Do Not Deliver Before Date	2014-07-22		
Retail Price	24.5		

Line #	Buyer Item #	Short Description	Ordered Item Quantity	Unit Price	Cost (USD)
03	2956126	FAIRY FLANNEL SS TW	40 EACH	13.95	558.00

Item Status	OPEN	SKU #	2956126
Destination	WSSPL PK SSI Retail	Qty per Inner Pack	4
Earliest Date	2014-07-10	Qty per Outer Pack	4
Latest Date	2014-07-19		
Vendor's Part Number	VP		
Event Code	HL14 2222		
Invoice Description	SHEET SET: 100% COTTON FLANNEL WOVEN PRINTED NAPPED NO EMBELLISHMENT (VENDOR PROVIDE PRICE BREAKOUT ON INVOICE)		
HTS1 Number	6302217010		
HTS1 Duty Percent	2.50		
HTS1 Approved Date	20140304		

Quick view of a WSI PO on GT Nexus continued…

Totals section. states the total amount for the Purchase Order.

TOTALS

Merchandise Total	1,253.50
Total Adjustment	0.00
Total Taxes	0.00
Order Total	1,253.50

REQUIRED DOCUMENTS

COMMERCIAL INVOICE

Vendors may ignore this section as the invoice will NOT be processed through GT Nexus as this time.

ADDITIONAL TERMS

SELLER WILL BE REQUIRED TO CERTIFY THAT IT HAS OBTAINED ALL APPLICABLE AUTHORIZATIONS, APPROVALS, LICENSES, QUOTAS, VISAS, CERTIFICATES OF ORIGIN, AND OTHER DOCUMENTATION TO PERMIT THE EXPORTATION OF THE MERCHANDISE FROM THE COUNTRY FROM WHICH THE MERCHANDISE WILL BE SHIPPED IN COMPLIANCE WITH ALL APPLICABLE LAWS AND REGULATIONS OF THE COUNTRY OF EXPORTATION. SELLER ALSO CERTIFIES THAT IT OR ITS …TED AGENT WILL OBTAIN AND PROVIDE ALL OF THE APPLICABLE AUTHORIZATIONS, APPROVALS, LICENSES, QUOTAS, VISAS, CERTIFICATES OF …OTHER DOCUMENTATION, AND INFORMATION REQUIRED TO PERMIT IMPORTATION OF THE MERCHANDISE INTO THE DESTINATION COUNTRY IN …NCE WITH ALL APPLICABLE LAWS AND REGULATIONS IN THE IMPORTING COUNTRY.

…dgement required on each invoice)

Additional Terms section.

User	Organization	Action	Version	MessageId	Timestamp (GMT)
Agent User	Williams-Sonoma, Inc.	Approve	1	8026385	2014-05-01 17:13:12 GMT

Details the information of the user(s) who have worked on the PO.

Note: "Agent User" indicates the document was auto approved and activated by the GT Nexus system .

Sample WSI PDF

Williams-Sonoma, Inc.
3250 Van Ness Ave.
San Francisco,, CA, 94109
UNITED STATES
Contact: Carlton

PURCHASE ORDER as of Wed May 14 22:35:38 GMT 2014

Contract ID	Contract Ref	
134361732		
Order Number	Issue Date	Version
30007638PBR	2014-05-06	41490001

SELLER
MAIN STREET MANUFACTURING
3031 1ST AVENUE COURT SE
HICKORY, NC, 28602
UNITED STATES

BUYER AGENT
No Agent - Domestic

CONSIGNEE
Williams-Sonoma, Inc.
3250 Van Ness Ave.
San Francisco,, CA, 94109
UNITED STATES

NOTIFY PARTY
Williams-Sonoma, Inc.
3250 Van Ness Ave.
San Francisco,, CA, 94109
UNITED STATES

SHIP TO
SYD
23 Wonderland Drive
Eastern Creek, 2766
AUSTRALIA

Incoterm	Partial Shipments Per Window: Not Allowed	Transshipments: No
Payment Terms: 30 Due System Check	Brand: PB	Channel: RTL
Department: PB UPHOLSTERED FURN	Origin Shipping Point: Raleigh NC	Payment Method: Letter of Credit
Division: Pottery Barn - Australia	Shipment Window: 2014-05-06 / 2014-05-13	Shipment Method: Air
Country Of Origin: UNITED STATES	Freight Pay Method: Collect -	

Line #	Buyer Item #	Short Description	Quantity	Unit Cost (USD)	Cost (USD)
01	11205	BUC P TB SFA CML	10 EACH	513.00	5,130.00

Destination	SYD	Earliest Date	2014-05-06
Latest Date	2014-05-13	SubRowCriticalFieldStatus	CRITICAL
ETA Final Destination Date	2014-05-23	Retail Price	0
SKU #	11205	Qty per Inner Pack	1
Qty per Outer Pack	1		

1 Item Ordered	Total Quantity	10	Merchandise Total	5,130.00

Totals

Merchandise Amount	5,130.00
Total Adjustment	0.00
Total Taxes	0.00
Order Total	5,130.00

Required Documents

Commercial Invoice

Additional Terms

Seller will be required to certify that it has obtained all applicable authorizations, approvals, licenses, quotas, visas, certificates of origin, and other documentation to permit the exportation of the merchandise from the country from which the merchandise will be shipped in compliance with all applicable laws and regulations of the country of exportation. Seller also certifies that it or its designated agent will obtain and provide all of the applicable authorizations, approvals, licenses, quotas, visas, certificates of origin, other documentation, and information required to permit importation of the merchandise into the destination country in compliance with all applicable laws and regulations in the importing country.

(Acknowledgement required on each invoice)

This document is a summary and does not contain all the terms and conditions applicable to the transaction. The complete document may be accessed on the system.

Page 1 of 1 Powered by TradeCard

How to use the Notes Editor

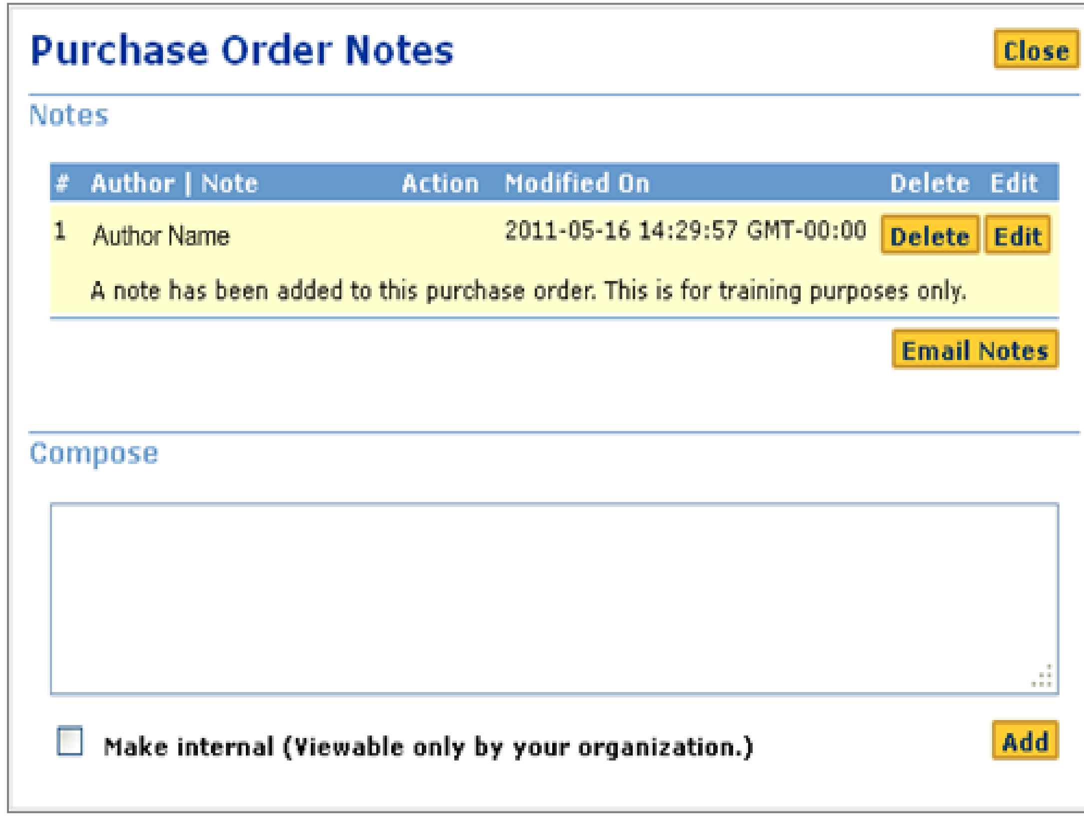
To use the noted editor, complete the following steps.

1. Click **Notes Editor** on the **Purchase Order – Preview** page. **The Purchase Order Notes Editor** page is displayed.
2. Enter your notes in the **Compose** field.
3. Click **Add**. The noted are displayed in the **Notes** section.
4. Click **Close**.

Purchase Order Notes

- To edit purchase order notes, click **Edit**.
- To delete purchase order notes, click **Delete**.
- To email purchase order notes, click **Email Notes**.
- To make your purchase order notes viewable only by your organization, click **Make Internal**.

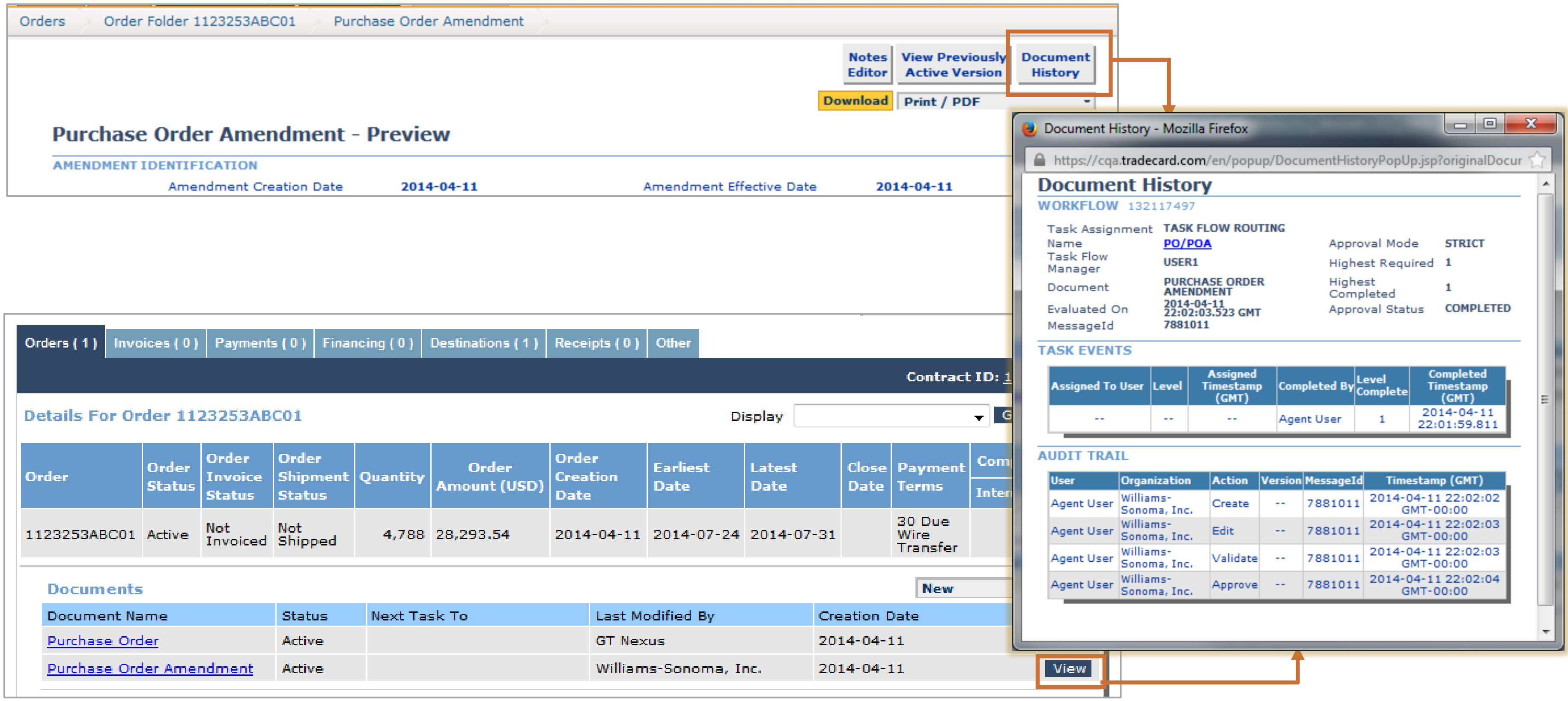
Notes Editor > Purchase Order – Preview page



Note: Your notes can only be sent to users who have subscribed to the **Document Notes** event. The purchase order notes added in Notes Editor do not appear in the purchase order PDF format.

Note: The Notes Editor character limitation is 256.

How to View Document History



Access the Document History via 2 ways:

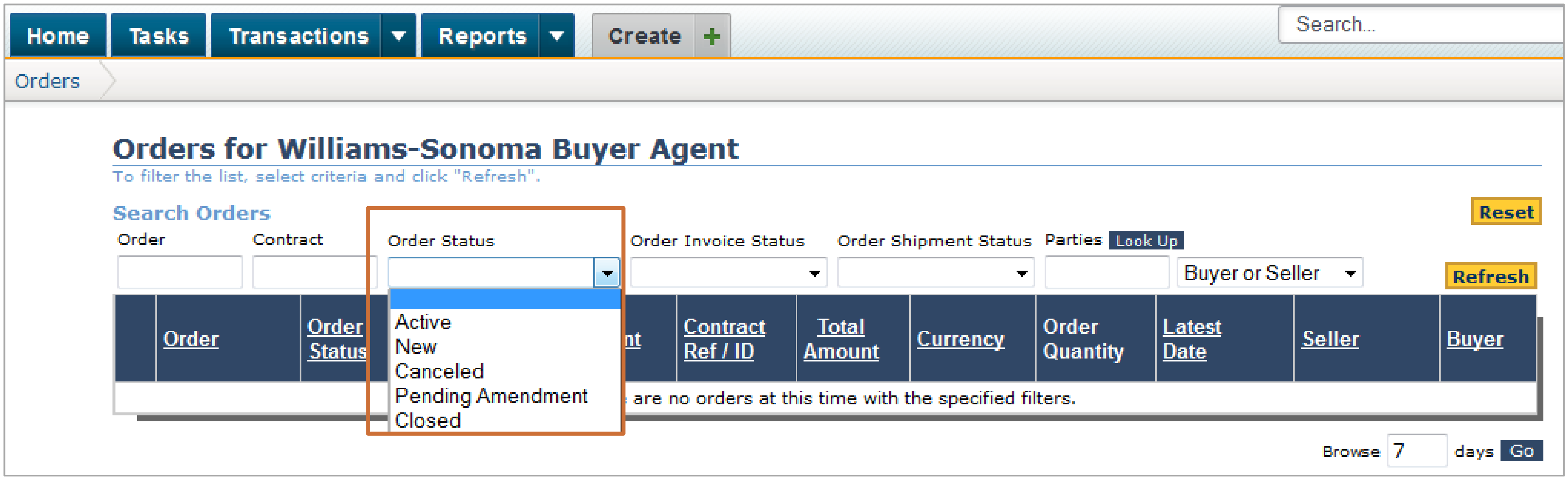
1. Click **Document History** button located on the **Purchase Order – Preview** screen. Or
2. In the **Order Folder**, scroll to the **Documents** section, click the **View** button in the **History** column of the **Purchase Order.**

Document – History page you can view

- Workflow
- Tasks Events
- Audit Trail

Canceled and Closed Purchased Orders Documents

- From the **Transaction** tab, Users may search for **Canceled** or **Closed** purchase orders by selecting the Cancelled or Closed Status from the **Order Status** filter.
- By default, cancelled or closed orders are not visible when the order status is left blank.



Purchase Order Numbers

- The WSI PO System number will be used as the Purchase Order number in GT Nexus.

Note: Canceled Purchase Order Documents are not visible on POC worksheets.

PO Collaboration

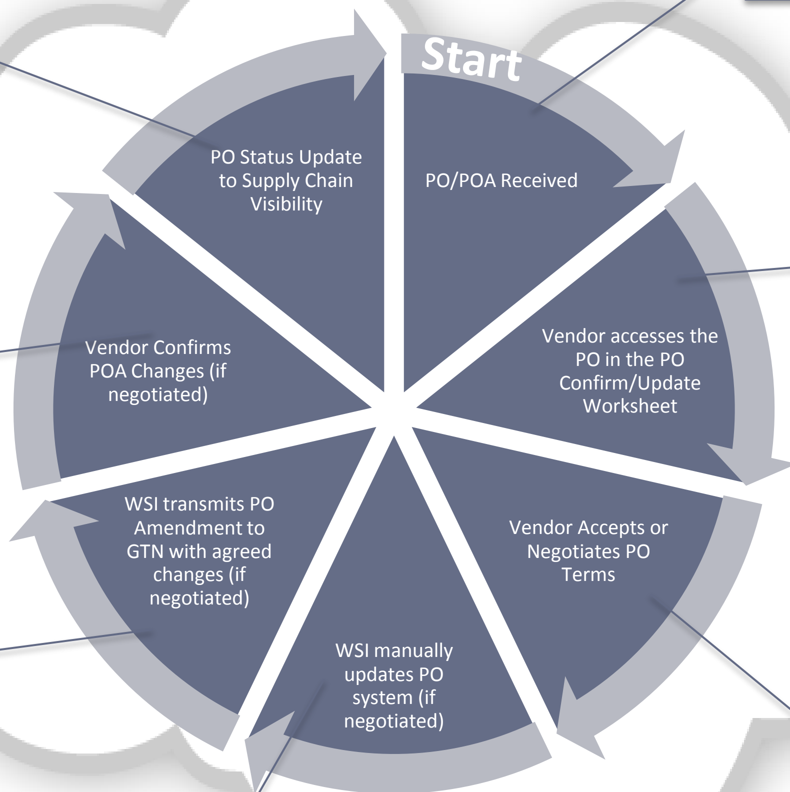
- About PO Collaboration
- Collaboration Status
- Basic Functionality
- How to access the PO Confirm/Update worksheet
- How to accept/negotiate a PO Line
- Scenarios
- Split Lines
- How to batch approve
- Working offline

About Purchase Order Collaboration

PO Collaboration is a tool for negotiating and confirming purchase order terms, such as delivery dates, price and quantities.

All Purchase Order and Amendments will originate with WSI.

GTN Supply Chain Visibility reflects PO Status Accept.



The Vendor will access the PO Collaboration Worksheet to review the PO Terms. Each row in the worksheet will be populated from the PO main line.

Vendor conducts a final confirm to the POA which contain the negotiated terms.

The Vendor will either confirm the Order Terms as issued or negotiate alternative values against one or more of the 8 specific fields allowed by WSI.

Note: Vendor may split lines to offer more than one commitment.

WSI will transmit a POA to GTN with the final agreed negotiated terms.

WSI will manually update their PO System with any final agreed negotiated terms

About PO Collaboration

- The GTN PO Collaboration Worksheet enables Vendors to confirm their acceptance or request to negotiate on specific PO Terms as identified by Williams-Sonoma.
- PO Terms (referred to as milestones within the POC Worksheet) available for confirmation/negotiation are:
  - MC – Master Case
  - DL – Distribution Lot
  - Ship Window Start Date
  - Ship Window End Date *(Note: The End Date is calculated as +7 days from the Start Date automatically)*
  - PO ETA
  - Item Quantity
  - Ship Method
  - Item Unit Cost
- The Vendor is required to select a Revision Reason when negotiating on a milestone.
- If the vendor wants to negotiate outside the above mentioned PO Terms, please communicate offline with WSI.
- If the Vendor negotiates on any item, Williams-Sonoma will review the Vendor proposed updates by accessing the PO Collaboration Worksheet online. The WSI User has the option to enter a counter proposal or accept the negotiated items.

About PO Collaboration, continued

- If a counter proposal is entered, the vendor must then review the new changes and again confirm the lines or further negotiate. This process continues until both WSI and the vendor confirm the PO Line Terms.
- Williams-Sonoma can also initiate a PO Negotiation on active orders before the vendor has responded to the original PO with either confirmation or negotiate. To do so the WSI User will open the PO Collaboration worksheet and enter the revised values against the appropriate terms. The vendor will then review to confirm or negotiate the revised terms, not the original which have been superseded.
- Once the PO Line has been confirmed by the Vendor, the line item is locked and closed for further changes by the vendor.
- If a PO Line is negotiated by the vendor, it is locked from further updates by the vendor until WSI responds with a POA to confirm acceptance of the changes, or the WSI User responds with a counter proposal.
- If a Vendor selects “Other” as a Revision Reason, comments explaining what the Other reason is must be entered in the V Comments column.

About PO Collaboration, continued

- Either WSI or the Vendor may use the Split Line feature within the POC Worksheet.
- All Split Lines held under a main line must be confirmed before the main PO line will reflect confirmed.
- Once the negotiation of Split Lines is completed, status "Negotiation Completed", the WSI User will update the WSI PO System with the Split Lines as separate PO Lines. A new POA will be generated to GTN with the changes. The vendor is required to confirm the changes introduced in the POA.
- Vendors may use the PO Collaboration Work in Excel functionality which enables the Users to perform the collaboration activities offline, then sync back into GT Nexus.

NOTE: Split Lines may not be managed within the Work in Excel function nor are split lines reportable.

About PO Collaboration, continued

- WSI has identified a set of “Critical Fields” which when changed represent a materially important amendment to the Order for which Vendors need to be aware of.
- Vendors are strongly encouraged to subscribe to the POA Activated email subscription to receive an email alert with an accompanying POA PDF showing the changes.

- The following fields are considered Critical Fields. A PO Amendment will be flagged at the header if there is a change to any of the critical fields. Users can subscribe to POA PDFs when a critical field is changed.

Critical Fields:

- **Item Quantity**
- **Ship Method**
- **Item Unit Price**
- **PO ETA**
- **Lading Port**
- **Origin Shipping Point**
- **MC – Master Case**
- **DL – Distribution Lot**
- **Ship Window Start and End Date**
- **Country of Origin**
- **Retail Price**
- **Short Description**
- **Invoice Description**

- There is 1 collaboration worksheet available.

Worksheet	Description
PO Confirm / Update	This worksheet will load PO Lines for the PO Accept/Negotiation process.

About PO Collaboration – Required Fields

The following field are required by WSI and/or the Vendor when negotiating on the POC worksheet.

Column	WSI	Vendor
Revision Reason	✓	✓
Negotiate	✓	✓
Save	✓	✓
Comments	✓	✓*

- **Vendor Comments** are only required when the Revision Reason is "Other" However it is strongly recommended that comments are entered any time the reason for the change is not obvious.

Collaboration PO Line Status

Use the Collaboration PO Line Status column to filter, view status changes and determine what actions are required to finalize negotiations.

Collaboration Status	Description	Responsible Party	Action Required
PVR - New	A new PO requiring vendor review and processing.	Vendor	Review the new PO to either confirm or negotiate.
PVR - Negotiate	WSI has Rejected the vendor's proposed changes.	Vendor	Review WSI comments and respond with acceptance or negotiation.
PVR - Critical	POA received in which WSI has a change to a critical PO value (Quantity, Ship Method, Date).	Vendor	Immediate review and response to WSI proposed changes. Confirmation or Negotiation.
PVR – Non-Critical	POA received in which WSI has changed a Non-Critical field.	Vendor	Review WSI changes and respond with confirmation or negotiation
PVR – Retrigger	Allows Vendors to confirm PO Lines when aggregators and milestones consist the same values.	Vendor	Review and confirm the lines.
PWR - Negotiate	Status after the Vendor has made a proposal which now requires WSI review.	WSI	Review Vendor changes and either confirm or negotiate back to Vendor
Vendor Confirmed	Status after the vendor has confirmed the line without any negotiation.	WSI	No Action required. PO Status automatically updated to SCV Views
Negotiation Complete	Status after both WSI and Vendor have agreed to PO Terms following the initiation of negotiation.	WSI	Update PO System with agreed changes and trigger POA to GTN.
Error : Revision Reason Required	Status when the Vendor has updated the negotiation term but not selected a Revision Reason	Vendor	Select an appropriate Revision Reason
Vendor Review Error	Status when an error occurs during vendor negotiation.	Vendor	Review the error and update the worksheet accordingly
WSI Review Error	Status when an error occurs during WSI negotiation.	WSI	Review the error and update the worksheet accordingly

- **PVR** = Pending Vendor Review
- **PWR** = Pending WSI Review

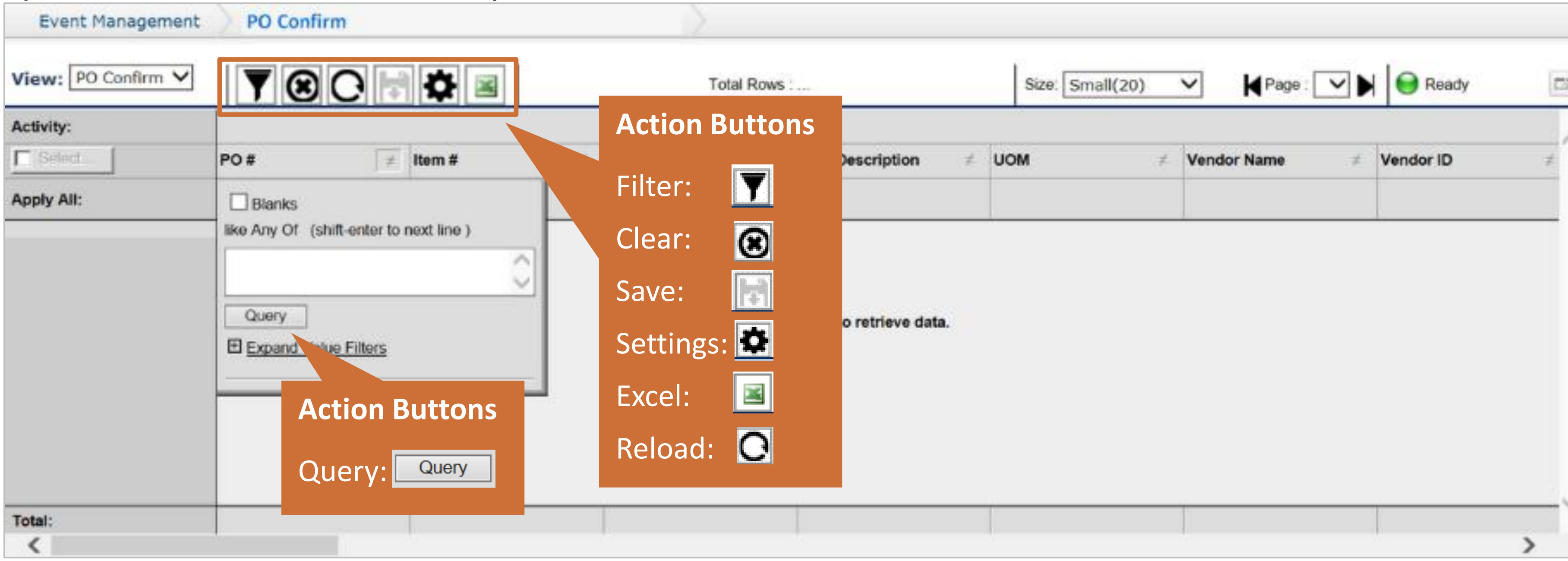
Note: The status will update in GTN after 10-15 minutes.

Process for Furniture and Decorative Accessories Orders

- For **Decorative Accessories** orders, vendors should negotiate/confirm the PO through the PO Collaboration process.
- For **Furniture** orders , vendors should:
    - Access the POC worksheet and pull out relevant information from the worksheet to perform the **PPO** process, which is through email/excel negotiation method.
    - Vendors will not perform any negotiation actions for the **Furniture** orders in POC worksheet, leaving the status of these orders as always in "**PVR-NEW**" .
    - After and until the Furniture orders are negotiated / finalized via the PPO process, the vendor will then go into the POC worksheet and perform the "**V confirm**“ action
    - If the vendor has more than one factory, the vendor can then proceed with the Order Assignment task to assign the order to a specific factory. An amendment will be required to transfer the factory details to Supply Chain Visibility platform.

About Worksheet Basic Functionality

Once you are brought into the **Event Management** Worksheet page, you will find all action icons are placed next to each other on top of the worksheet.

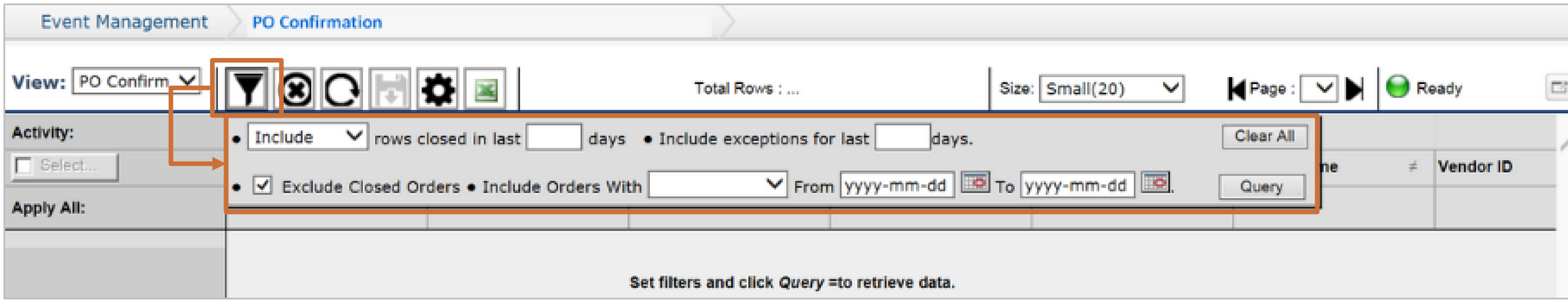


1. **Filter**: Header level filters are available under **Filter** icon.
2. **Clear**: The **Clear** icon removes all column and header filters.
3. **Save**: The **Save** icon saves changes to worksheet. **Note**: The **Save** icon is presented in disabled state ( ) when data is loaded and will only be enabled ( ) when user makes changes to the worksheet.
4. **Settings**: **Settings** icon provides pop-up with the options: **Show Columns totals** and **Show Split Screen**.
5. **Excel** : **Excel** icon downloads worksheet data to Excel.
6. **Reload**: **Reload** icon will query and load data again. **Note**: If unsaved changes are detected, warning message will be triggered to remind user if proceeds to reload data, changes will be discarded.
7. Query : Use the **Query** icon to search for data based on the set filters. It is available under all column level filters.

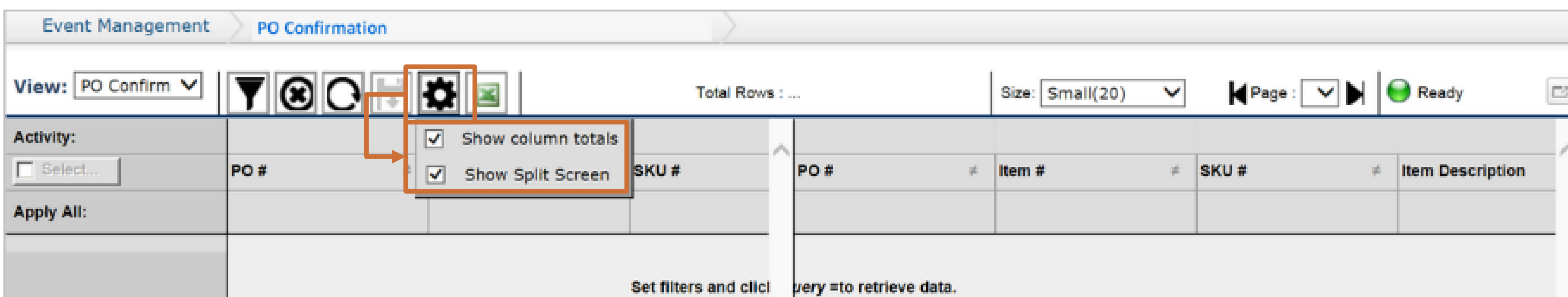
About Worksheet Basic Functionality, continued

- By clicking **Filter** Icon, a pop-up will allow users to further filter the worksheet.

Note: To view **closed** lines, which means to filter out items that have already been confirmed and closed from further update, you must enter a value at **Include rows closed in last xxx days** or specify a timeframe to search from in the worksheet filters to view the closed item. .

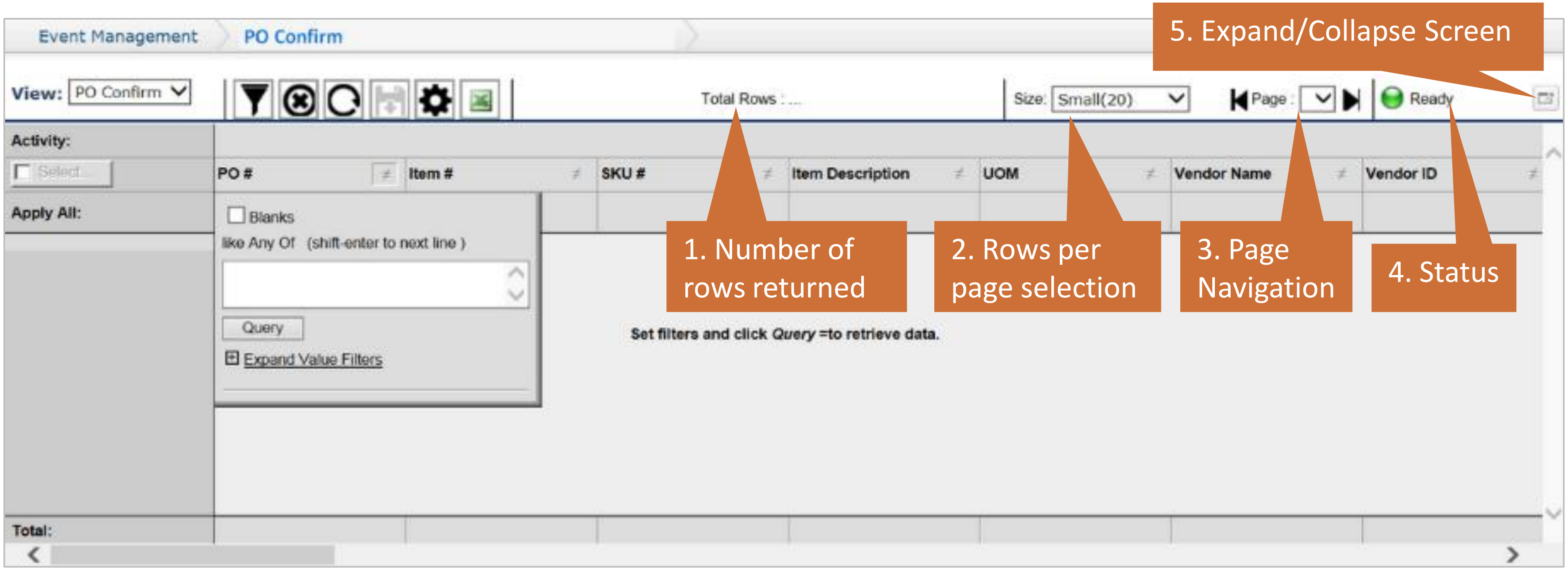


- By clicking **Options** icon, a pop-up will allow users to manage the worksheet window:
  - **Show column totals**: Checking off the box will cause the total number of rows to be displayed at the top of the window.
  - **Show Split Screen**: Check off the box to split the screen to 2 which will allow you to view two parts of a sheet at the same time and apply filters at either screens whenever needed.



About Worksheet Basic Functionality, continued

1. **Totals Row** : Displays total number of rows that a filter query returns.
2. **Rows per Page Selection**: Allows user to define the number of queried rows returned to display on one page.
3. **Navigation Buttons**: Allows users to navigate between pages of rows returned in the query.
4. **Worksheet Query Status**: Displays the worksheet and query status.
5. **Screen Expand/Collapse Icon**  : to hide the upper main navigation and lower information displays to allow for a larger view of the Worksheet.

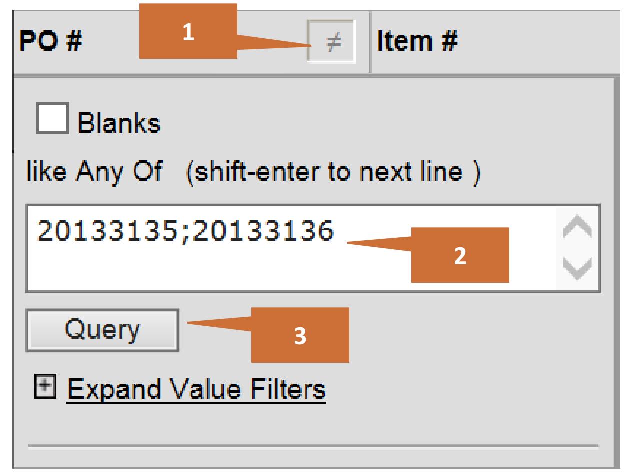


How to Filter Line Data on the Worksheet

To filter line data on the worksheet, take PO# search for example, complete the following steps.

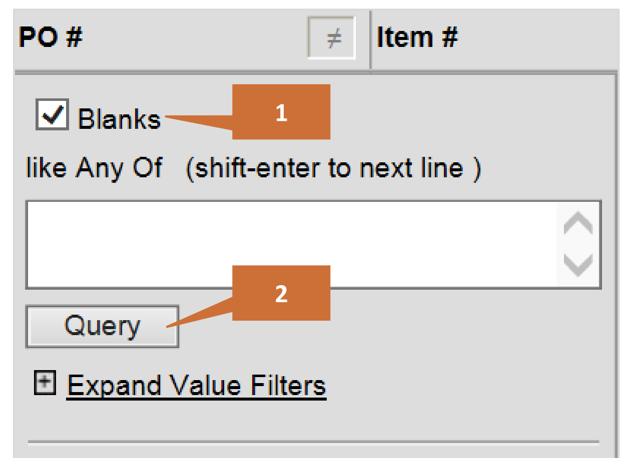
1. Click the ≠ icon of the column filter, e.g. **PO#** column.
2. If you have specific values in mind, enter the info, e.g. PO number, in the **Like Any Of** field.
3. Click **Query** or (Reload) icon to retrieve the search result.

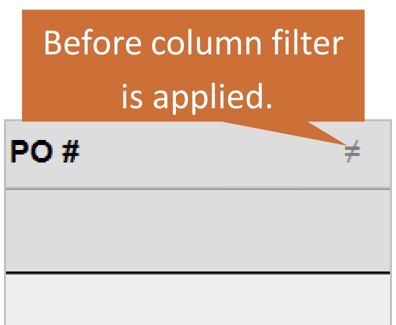
Tip: To use wildcard searching, type an asterisk in front and/or /behind the partial number. For example to Find "11520204", you may type "*0204" then click **Query** or **Reload** icon.

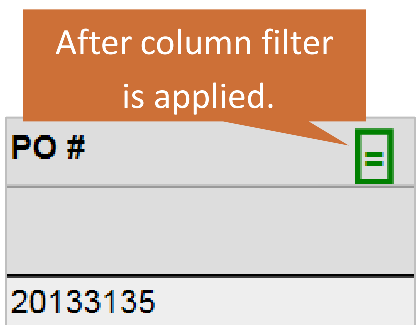


In the event that you want to filter the line data by null value, complete the following steps.

1. Select the **Blanks** check box.
2. Click **Query** or (Reload) icon to filter out the result with blank value.



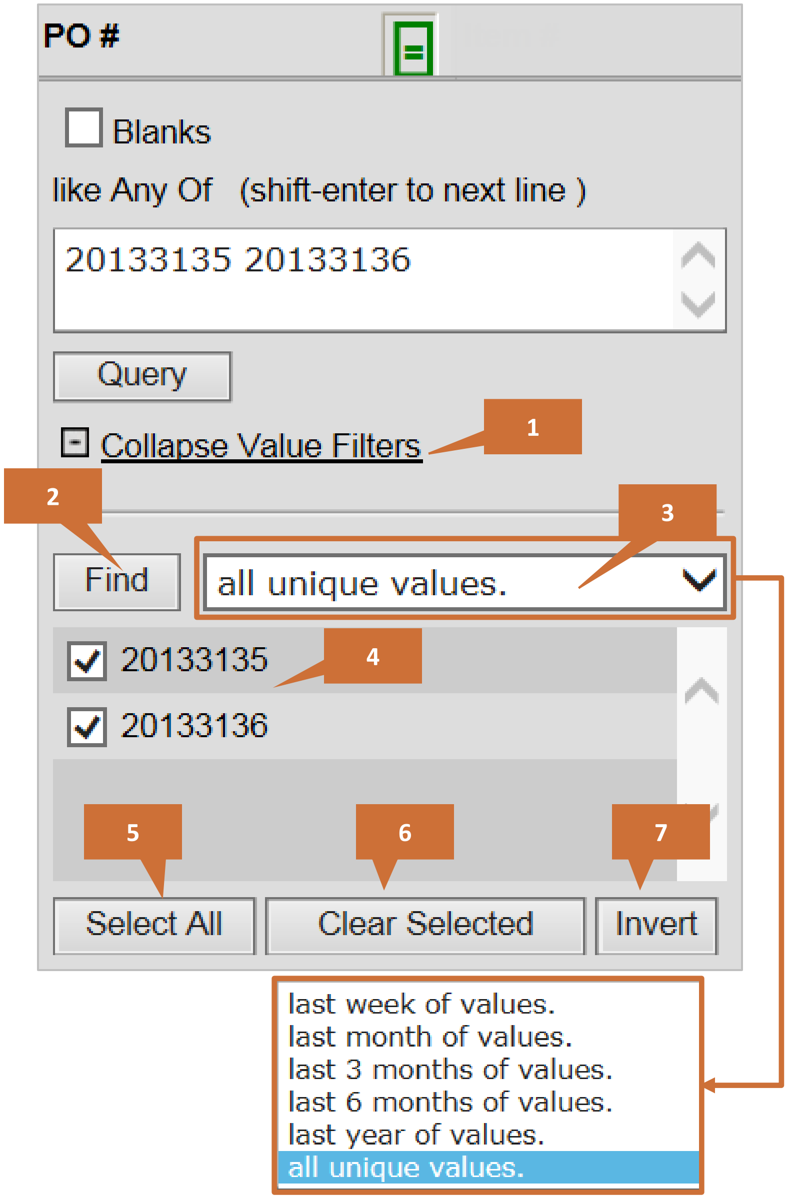




How to Filter Line Data on the Worksheet – Additional Features

If you do not have any specific values in mind, you can use more filter features of the column to search for the data you want:

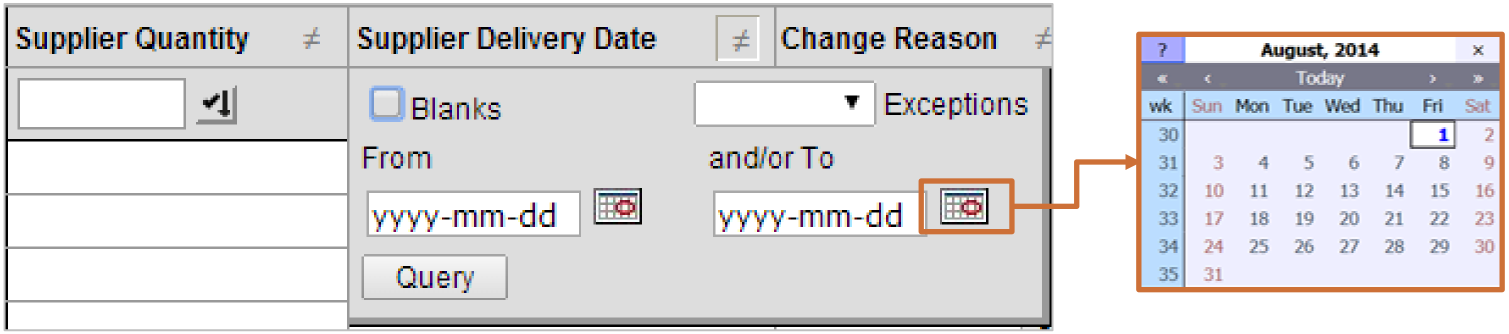
1. **Expand Value Filters/Collapse Value Filters**:
   - Clicking **Expand Value Filters** will open up more filter features;
   - Clicking **Collapse Value Filters** will hide the additional filter features.
2. **Find**: If you have a large set of document numbers in hand to be filtered on the worksheet, you can copy the numbers and paste them into the **Like Any Of** field, then click **Find**. The system will filter all these exact set of numbers and auto-select them. Thus manual entry/selection work can be reduced.
3. **Time Range Dropdown**:
   - You can click the dropdown list and select a time frame during which the data is sent into the system.
   - Or select **All Unique Values** regardless of the time frame.
4. You can manually select the check box of each value displayed.
5. **Select All**: Allows you to select all displayed values at once.
6. **Clear Selected:** Clears all selections.
7. **Invert**: reverse the selection of items, i.e. if PO #1,3,5 are selected, once you click the **Invert** button, the PO#1,3,5 will be deselected and #2,4,6 will be checked off instead.



How to Filter Line Data on the Worksheet – Date Range & Exceptions

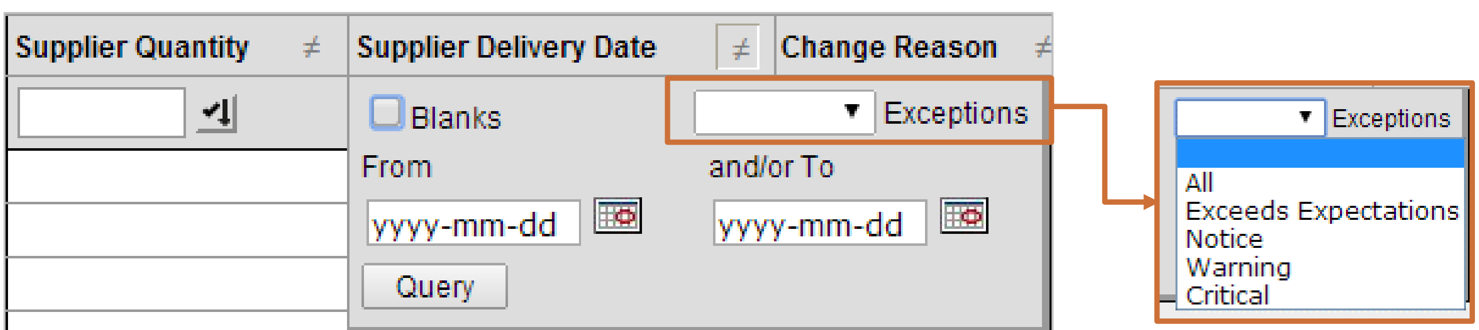
If the column filter is a **Date** column, you can select a date range to display lines within this time range:

- **Calendar** icon: Clicking the icon helps you to define a date range in which the milestone dates are entered.



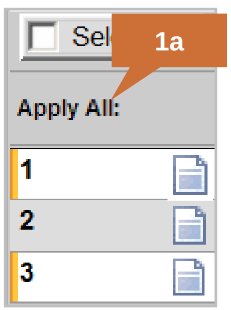
Additionally, you may filter the worksheet lines by using the **Exceptions** filters.

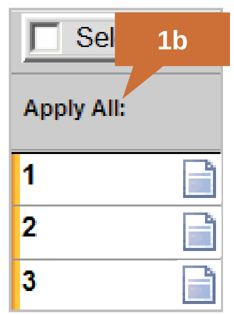
- **Exceptions** dropdown:
  - The **Exceptions** filter allows users to filter milestones columns by exception.
  - The **Exceptions** filter lists all four exception types and an option to search for all. Exception filters include: **Notice**, **Warning**, **Critical**, **Exceeds Expectations** and **ALL**.
  - The **Exception** filter can be used concurrently with other milestone column level filters. Only if all filter conditions are matched will the results be returned.

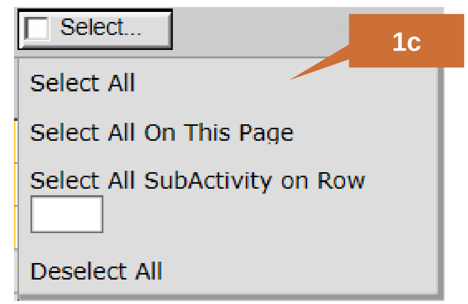


How to Batch Update the Worksheet field

1. There are 3 options to select multiple lines for the batch update:
   a. Pressing the **CTRL** button on your keyboard and select the rows one by one.
   b. Selecting the lines by pressing the left mouse button and scrolling over the rows need to be confirmed
   c. Alternatively, at times you need to confirm ALL the available line items displayed on the worksheet, simply click **Select All** button to have all lines selected or **Deselect All** to cancel your selections.

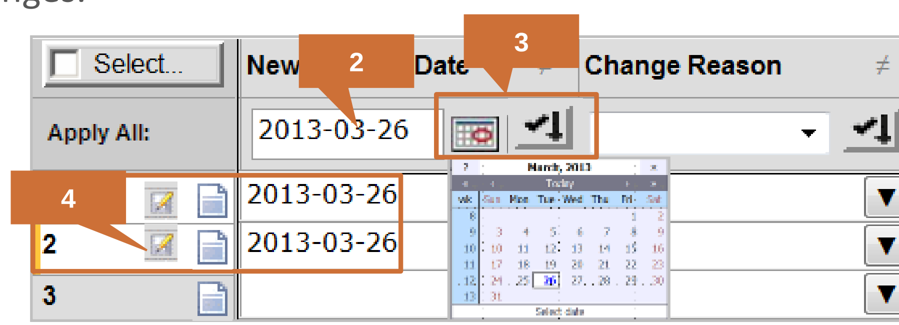






2. At the top of each enabled row is a editable field for update.
3. Selecting a date from the calendar icon or manually enter a value then click the **Apply Down** icon.
4. The values are then updated in the selected cells and the (disc icon) is displayed against the rows to indicate you still must click the **Save** icon to save the changes.

Note: We do <u>**not**</u> recommend using the **Apply All** feature to update the **Comments** field. Using this feature overwrites any previously entered text. A maximum of 250 characters is allowed in the **Comments** field, including spaces.



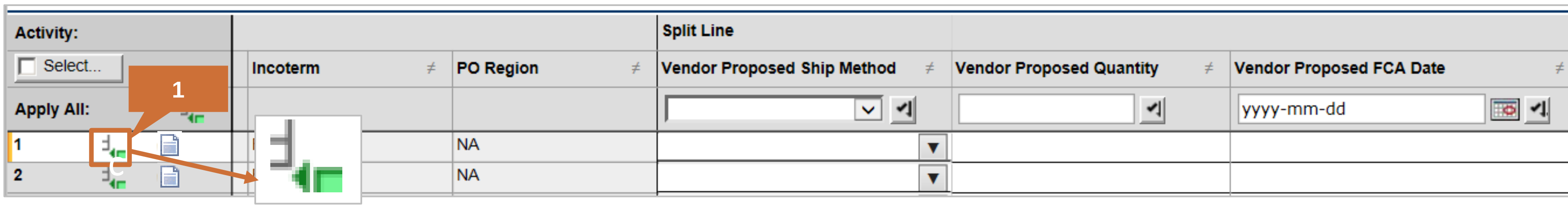
About Split Line Functionality – Add Sub Rows

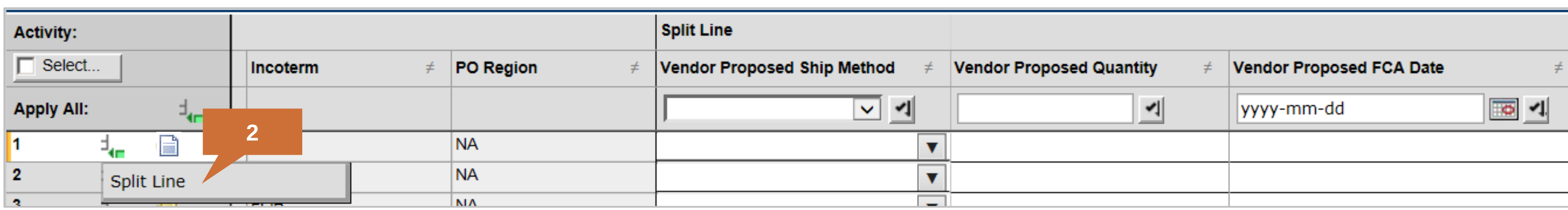
Split Line Functionality enables users to propose order split lines by adding sub-rows on the worksheet.

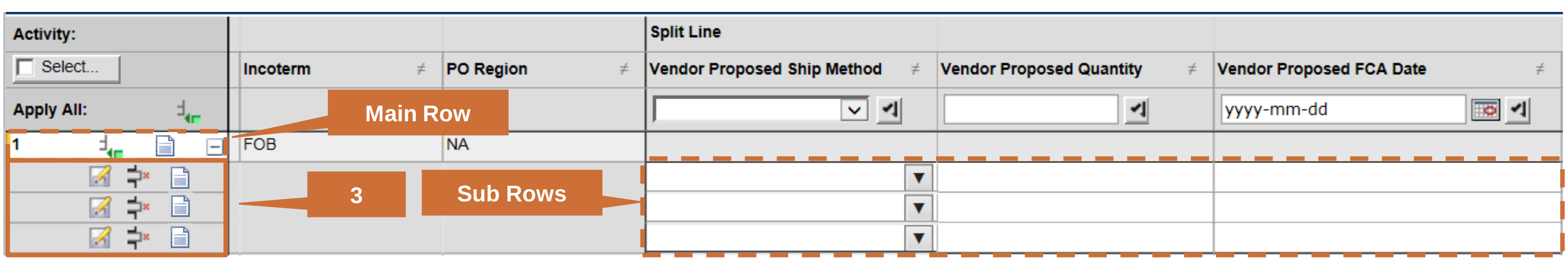
Example: Supplier proposes quantity and date split by adding sub-rows to a main row.

1. To add sub-rows, click on the "Add sub-row" icon ( )of a main row.
2. Select **Split Line**.
3. A default number of split lines will be added to the main row.

Note: Once the lines are split, the main row fields will be locked and cannot be edited. All negotiation must be made in the sub-rows' fields.



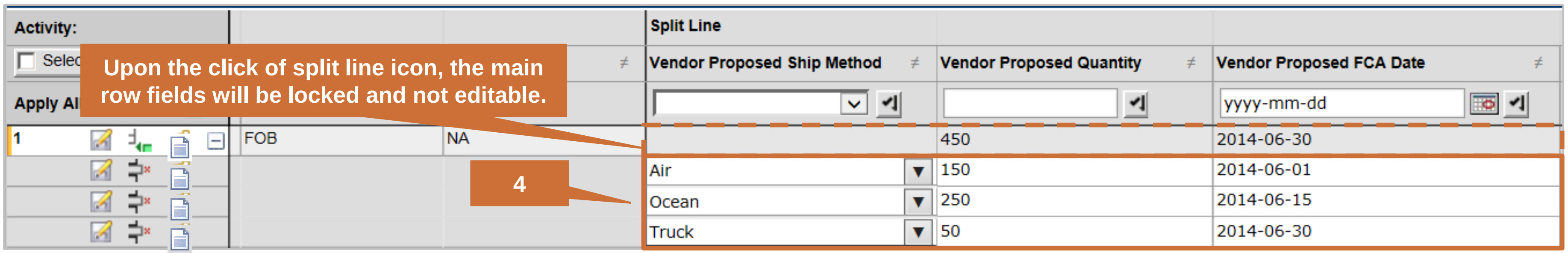




Example: Supplier proposes quantity and date split by adding sub-rows to a main row, continued

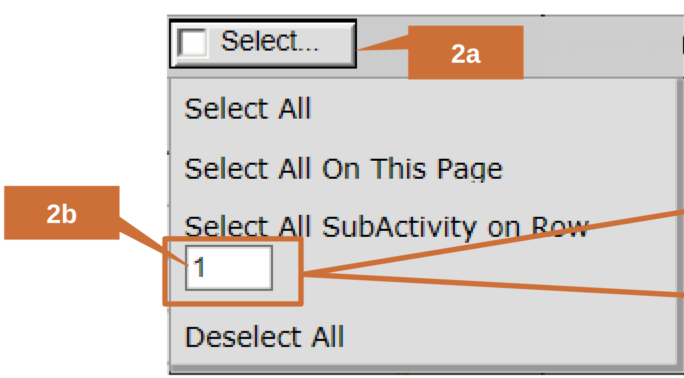
4. Supplier enters relevant information on sub-rows. Information entered on the sub-row updates the main row based on aggregation rules.

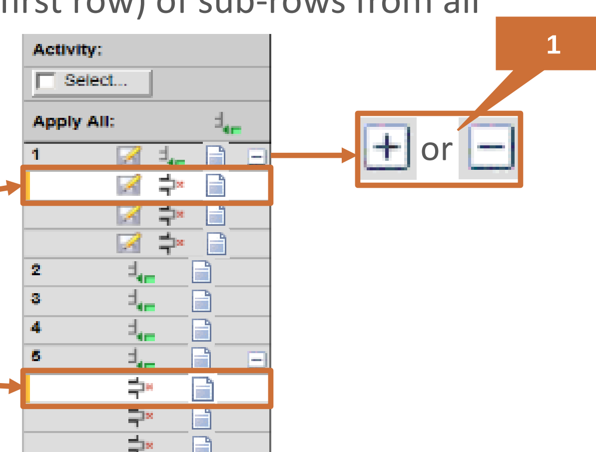
   Once supplier submits relevant information, the sub-rows status is set to ‘**Pending Buyer Review**’ for the buyer to review and accept, reject or propose alternative terms.



Tips:

1. Use the expand (+) or collapse (–)functionality to show and hide sub-rows.
2. If you click **Select** then enter a number (e.g.1) in the **Select All SubActivity on Row** field, the system will automatically select the designated number (in this case, the first row) of sub-rows from all main rows.

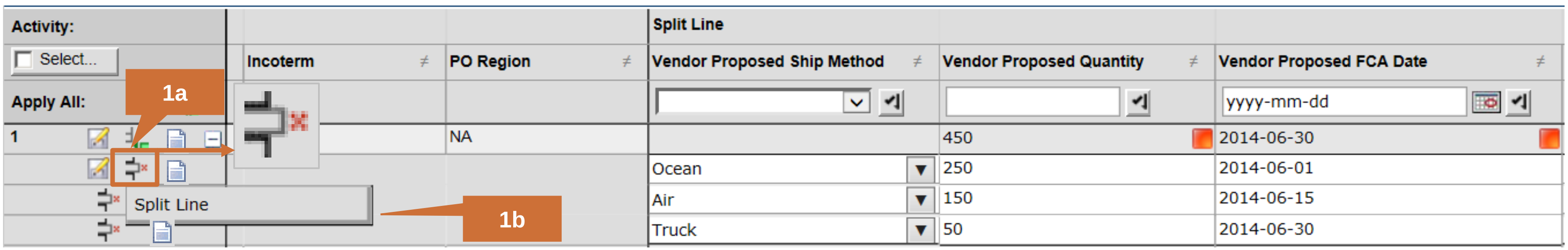


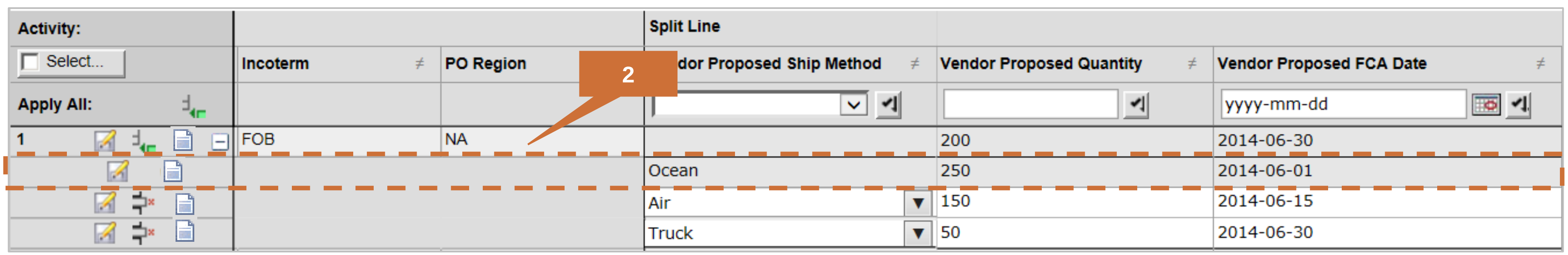


About Split Line Functionality – Remove Sub Rows

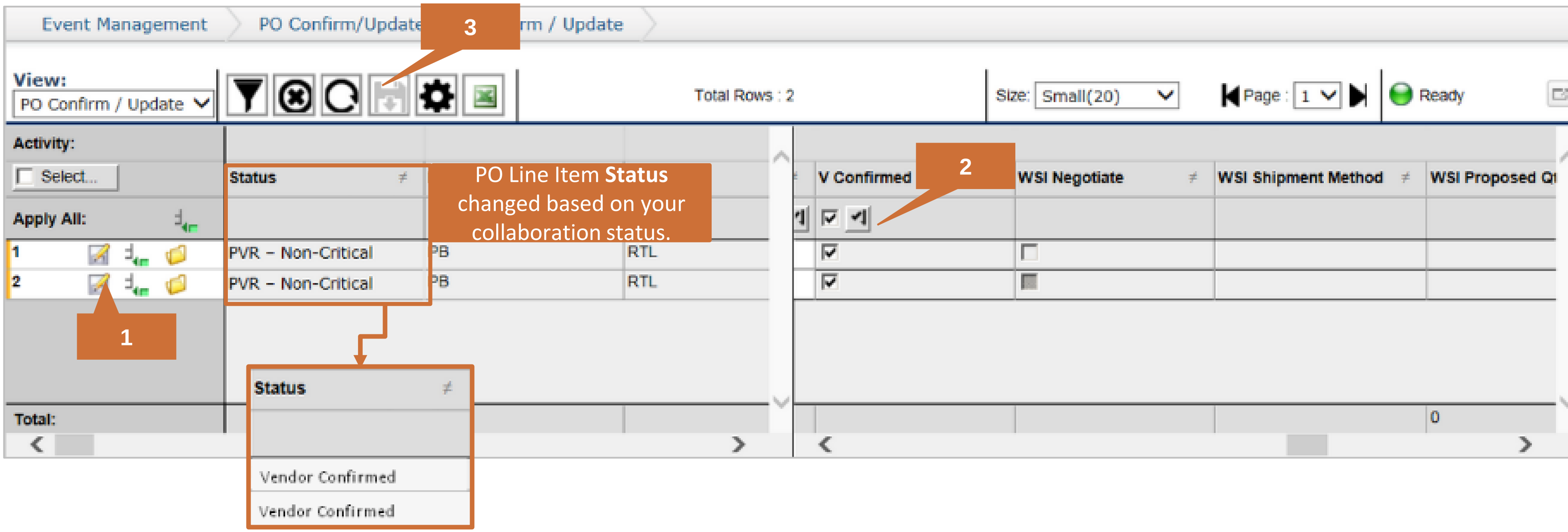
Example: Supplier removes sub-row(s) from a main row.

1. To remove a sub row from a main row, click  icon of the designated sub row then click on the pop-up **Split Line** icon.
2. The removed sub row will then be grey out and locked from editing. Once you click **Save**, the removed sub row will no longer be visible in the worksheet.





Scenario 1: Vendor Confirms the Original PO Lines (Status = Vendor Confirmed)



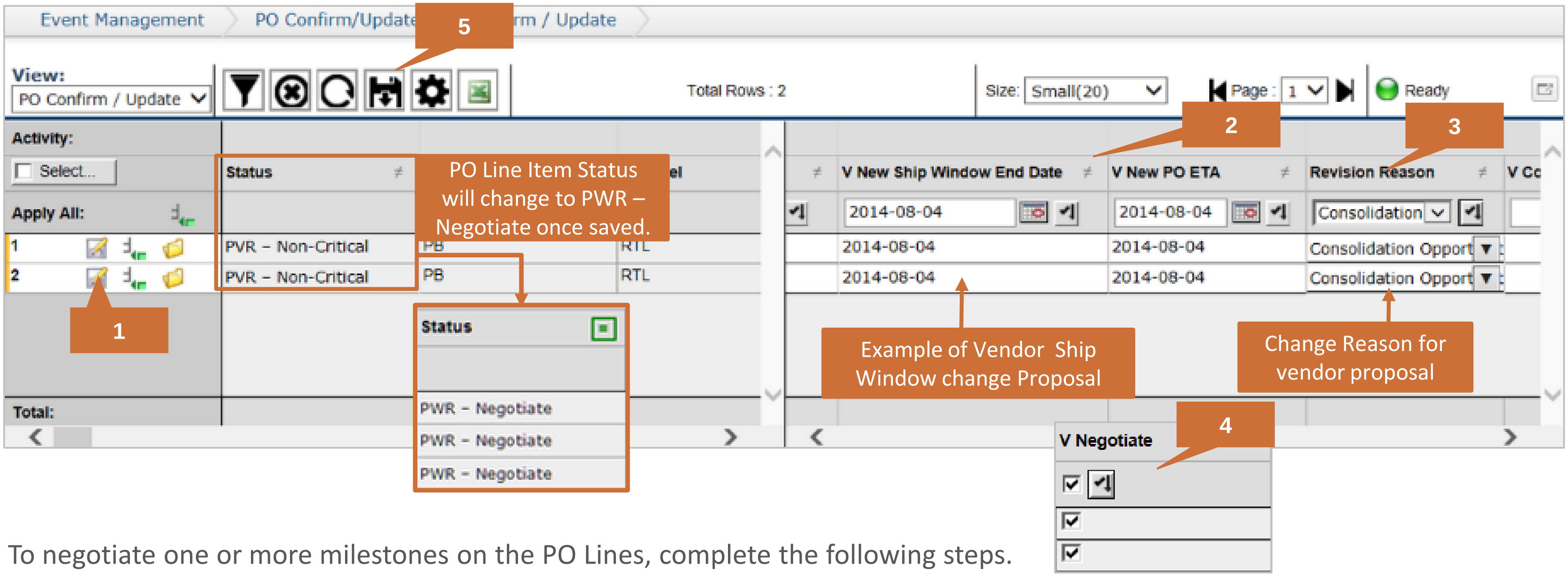
For each PO line, vendors can either accept the terms without proposing any changes or negotiate the terms with WSI.

To confirm the PO without negotiating, complete the following steps.

1. After filtering out the designated PO lines, click to select the lines.
2. Review all relevant PO Details. If the PO Line is accepted, check off the select box in the **V Confirmed** column and click **Apply down** icon to confirm all the selected lines. You may also check of each row independently.
3. Click the **Save** button. The **Status** column will display the selected lines as **Vendor Confirmed**. The lines will be locked preventing further changes and will be set **Closed**. No further action required for these lines.

Note: For **Furniture** orders, once vendors completed the PPO negotiation process (email/excel negotiation), vendors should access this worksheet and select the **V confirmed** columns for Furniture orders.

Scenario 2: Vendor Negotiates the PO Lines (Status = PWR – Negotiate)



To negotiate one or more milestones on the PO Lines, complete the following steps.

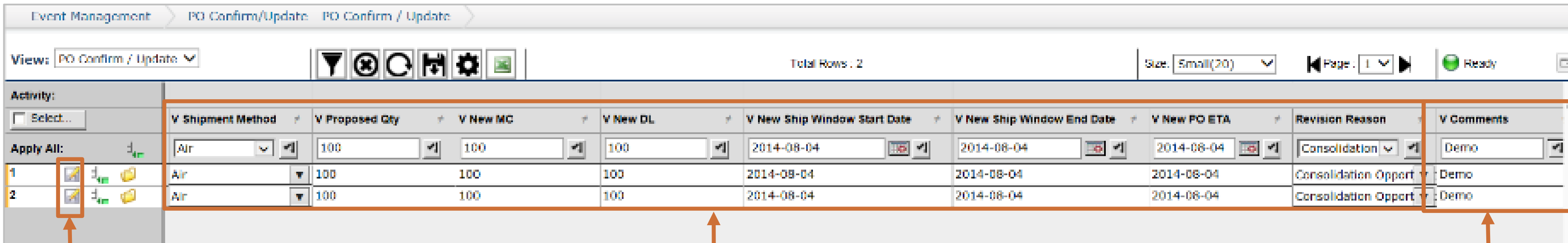
1. After filtering out the designated PO lines, click to select the lines.
2. Enter new values in one ore more of the Milestones. (See next slide for illustration)
3. Select a **Revision Reason** from the dropdown menu.
4. Check off the select box in **V Negotiate** column and click **Apply down** icon to apply the same changes to the selected lines.

Note: Only use the **Apply Down** icon if you want to bulk apply the same changes to multiple items.

5. Click the **Save** button. The **Status** column will display the selected lines as **PWR - Negotiation**. WSI will then review the changes:

- If the changes are accepted by WSI, the line **Status** will become **Negotiation Completed**. Lines will be locked to prevent the Vendor from proposing further changes. WSI will send a POA to update the original PO and the Status will change to "PVR – Critical" or "PVR – Non Critical", depending on whether the changed fields are critical fields or not. Vendor is required to select "V Confirmed" to confirm the line, so that the Line can be closed.
- If WSI offers a counter proposal, the line **Status** will be changed to "**PVR – Negotiation**" for further negotiation.

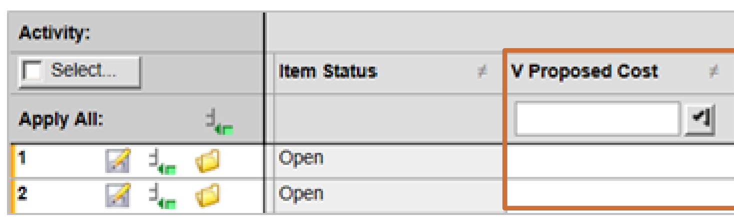
- WSI User may either check off the **WSI Approve** box for each PO Line to confirm the vendor proposal is accepted.
- Or enter a counter proposal against one or more of the milestones.



REMINDER - Edits are not saved if the disc icon remains against the PO Line. Be sure to click the save button before existing the screen

Vendor Proposed milestone edits

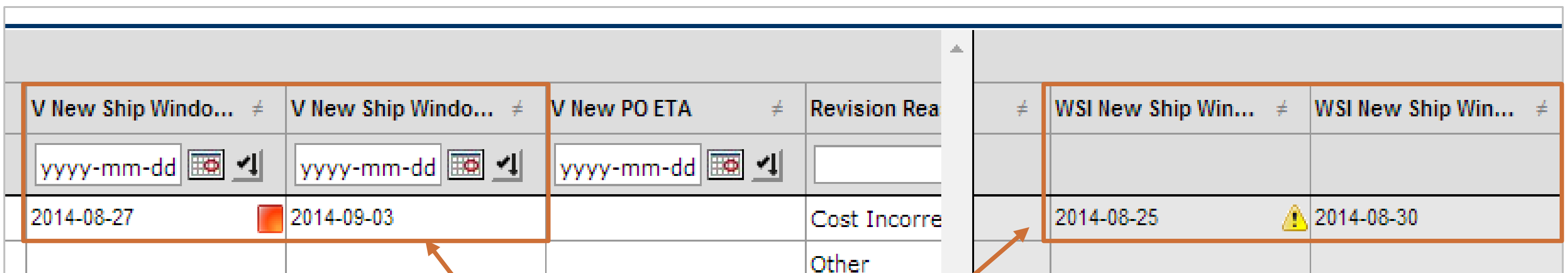
Vendor comments should be entered to explain the reason for the proposal. Only required if the Addtl V Proposed PO Changes is used.



Vendor comments should be entered to explain the reason for the proposal.

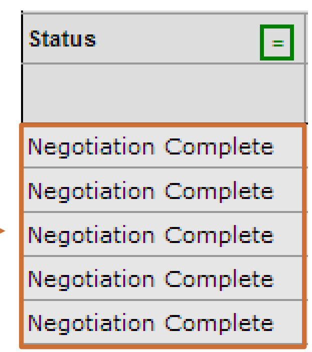
Scenario 3: Vendor Agrees to Negotiated PO Lines (Status = Negotiation Complete)

- If the vendor negotiated lines and WSI offered a counter proposal, the vendor can either respond with a counter proposal of their own by updating the milestones once more, or confirm their agreement to WSI's offer.
- To confirm negotiated lines, the vendor will update their milestones to match that of WSI, then check off the confirm check box and save. The Status will then change to "Negotiation Complete"
- WSI will then update their PO System and issue a POA. The Status of the PO line will become "PVR – Critical" or "PVR – Non Critical", depending on whether the changed fields are critical fields or not. The vendor must select "V Confirmed" check box as a final confirmation, so that the line can be closed.



Vendor milestones must match the WSI milestones to complete the Negotiation

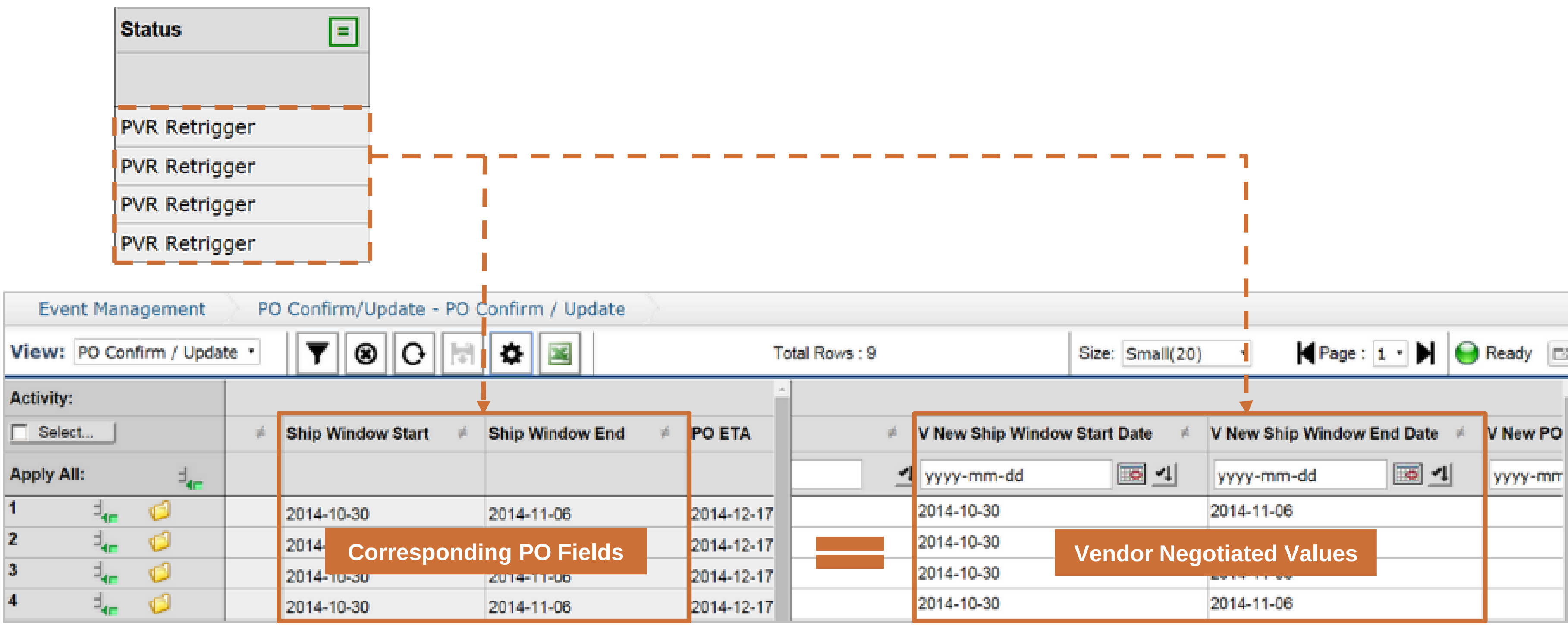
PO Lines which were Negotiated by vendor and agreed to by WSI will reflect a status of Negotiation Complete once both parties confirm.



Scenario 4: Vendor Confirms PO Lines with Status of PVR - Retrigger

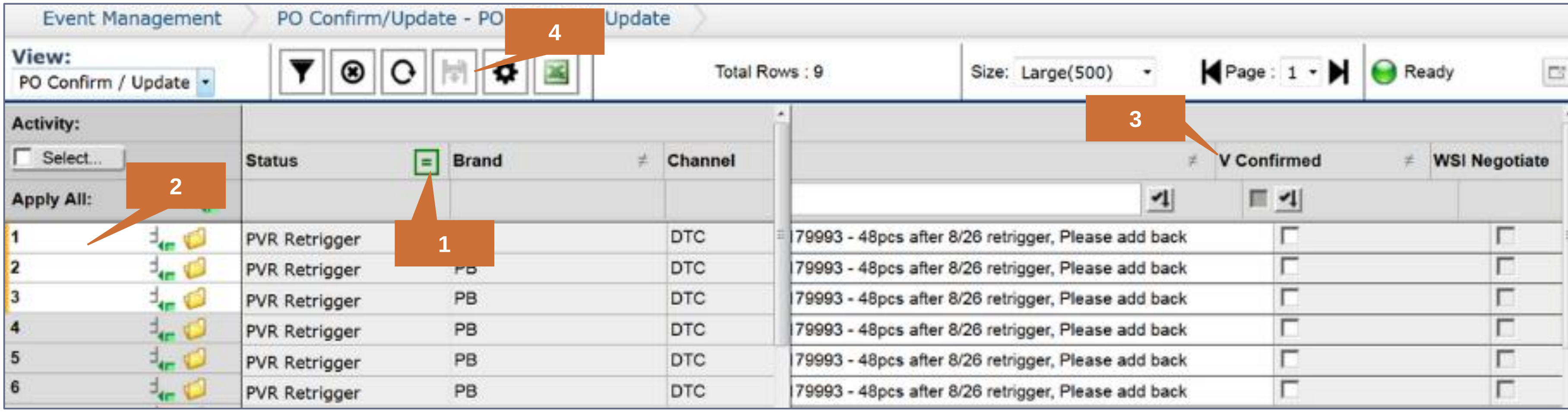
When you see the PO Line Status is "**PVR - Retrigger**", you will find that the Vendor's negotiated values are exactly the same as the corresponding PO fields. See below screenshot as an example: **V New Ship Window Start Date/End Date** = **2014-10-30/2014-11-06**, which is the same as **Ship Window Start/End** on the PO; however, the lines are not closed where they are supposed to. In this case, you will need to select the "**V Confirmed**" check box, so that the PO line can be confirmed and closed.

Refer to the next slide to learn how to filter and confirm PO Lines with Status of "**PVR-Retrigger**".



Note: If you decide to further negotiate the milestone values when the **Status=PVR Retrigger**, simply follow the steps outlined on **Scenario 2** to resume negotiate with WSI.

Scenario 4: Vendor Confirms PO Lines with Status of PVR – Retrigger, continued



To confirm the PO lines with “**PVR- Retrigger**” status, complete the following steps.

1. Filter the **Status** column with “**PVR – Retrigger**”. Tip: If you have a specific PO number in mind, you can use filter combinations, i.e. Status + PO Number, to search for the specific PO line with **PVR – Retrigger** status.
2. Select the PO lines.
3. Select **V Confirmed** check box and click the Apply Down icon.
4. Click the **Save** icon.
5. The **Status** column will be changed to “**Vendor Confirmed**”, meaning the lines will be confirmed/closed, and locked for further edit.

How to reopen a closed PO Line

- In the case where a Vendor confirms a PO Line in error, and the PO Line has a status of "Vendor Confirmed", the vendor can contact WSI and request the closed line be reopen. The status must be "Vendor Confirmed".
  - Reopening a closed line will open all milestones for negotiation.
  - It will also update the status of the line from "Vendor Confirmed" to "PVR – New"

For Example:

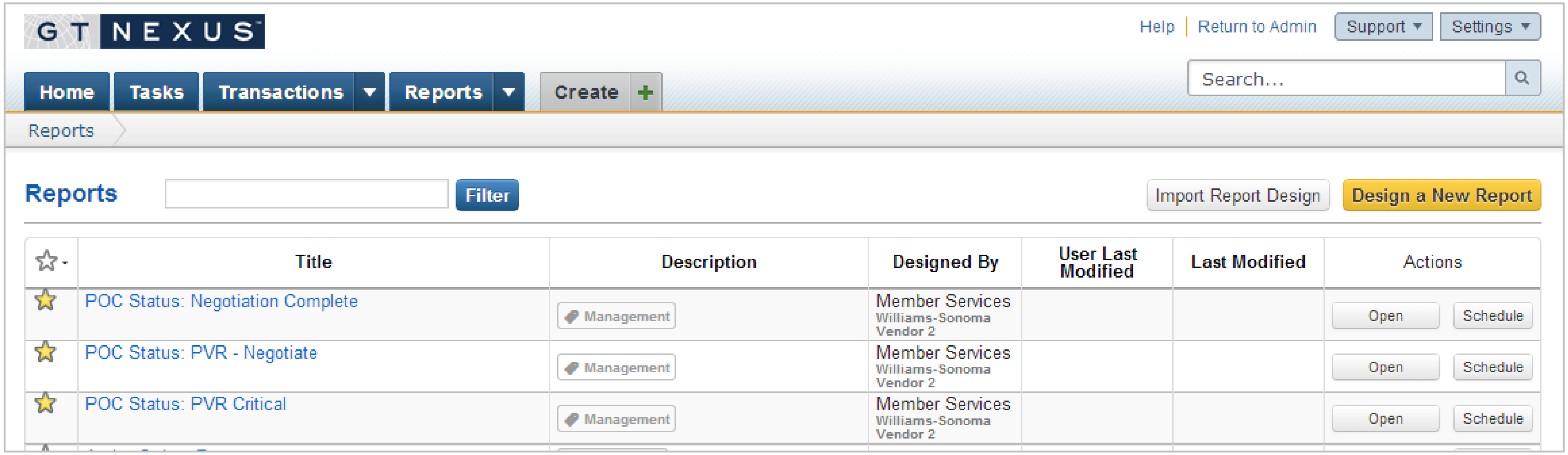
1. **Vendor, mistakenly confirms the PO Lines.**
2. **Line Status changes to "Vendor Confirmed" and line closes.**
3. **Vendor must contact WSI.**
4. **WSI must log into GT Nexus and access the Worksheet.**
5. **WSI User reopens the line by unchecking the "Closed' checkbox.**
6. **The line reopens for the vendor and the line status changes from "Vendor Confirmed" to "PVR – New".**

About Split Lines

- WSI can split a PO Line(s) to propose alternative dates, quantities, etc. for an original PO Line.
- Vendors can add multiple splits within the same line as well as splits on multiple lines.
- The split line would be negotiated in its entirety and would be sent to WSI at the time all sub-rows are confirmed
- Any "Negotiation Complete" split lines would be updated in the WSI PO System as separate PO lines and retriggered to GT Nexus

Using Reports to monitor Vendor Required Actions for PO Collaboration

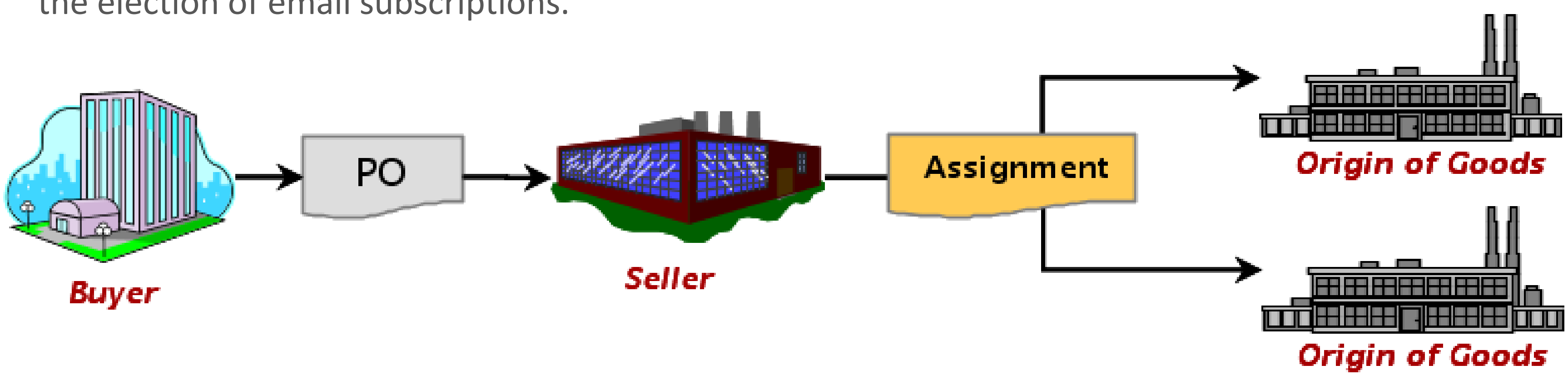
- When there is a pending PO Collaboration action for the Vendor to perform, those actions are not tracked for display in the Task view as with an Order Assignment task described later in this document.
- Vendor Users will use GT Nexus Reports to monitor when a PO Line is in “PVR - New”, “PVR – Negotiate”, PVR – Critical”, “PVR- Non Critical”, or “Negotiation Complete” status.
- Users may run the reports on demand or schedule them to be delivered via email one or more times a day.



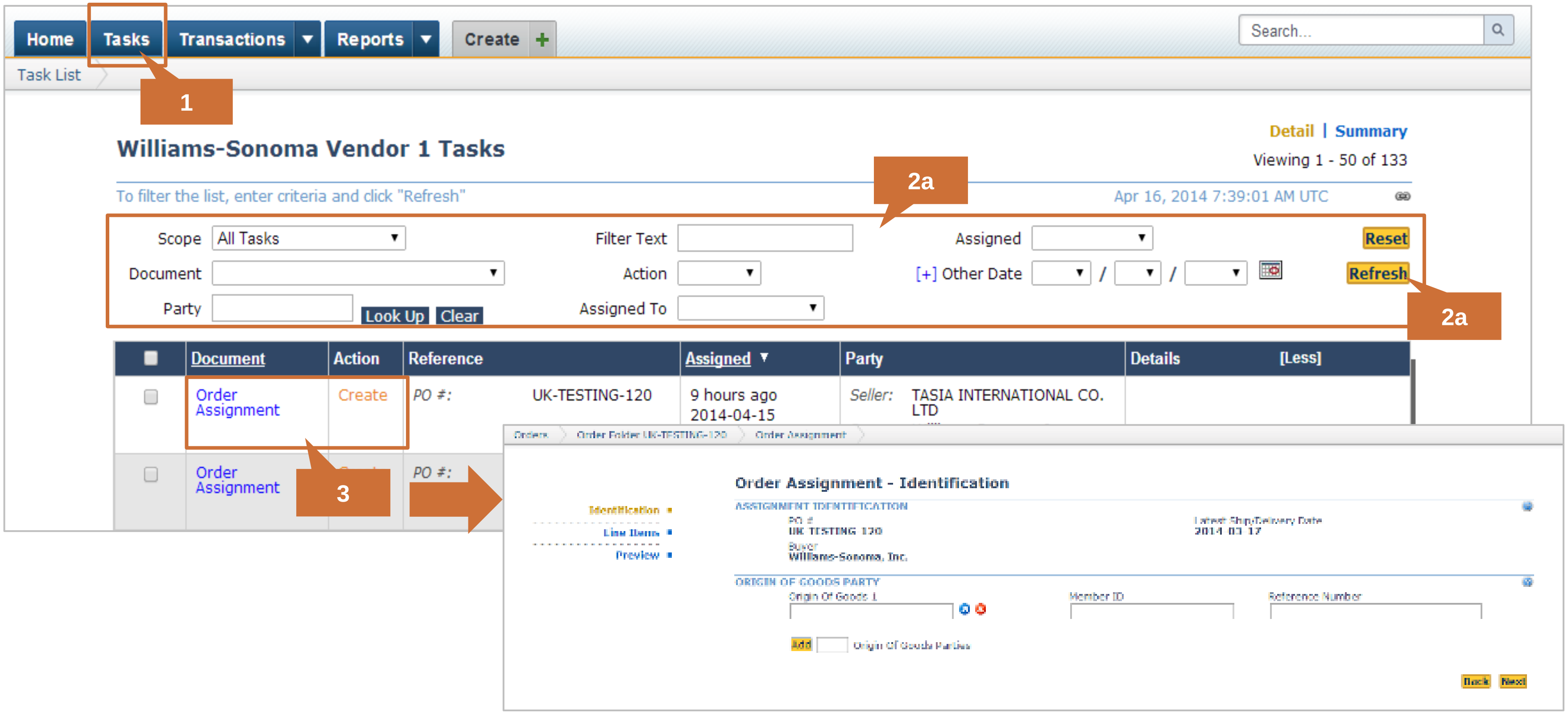
Order Assignment

Highlights of Order Assignment

- The Order Assignment document is a document created to identify and give visibility to the appropriate factory/origin of goods to produce items listed in the Purchase Order.
- Once the PO document reflects a status of "Active", the system will draft the Order Assignment and create a task for the vendor to action. The task will be assigned to the designated Vendor User.
  - If the Vendor has only one factory, the Order Assignment is auto-assigned to the factory and no task will be present for the vendor to action.
  - Vendors with multiple factories will require a User to assign a factory manually by completing the Order Assignment Task.
- Only one factory can be assigned per PO.
- The Order Assignment document (**Active** or **Pending)**, is stored in the Purchase Order folder.
- The Order Assignment can be made or amended at any point during PO Collaboration.
- Williams-Sonoma Factories will NOT have access to GT Nexus.
- Williams-Sonoma will have visibility to the factory assignments through reporting as well as through the election of email subscriptions.



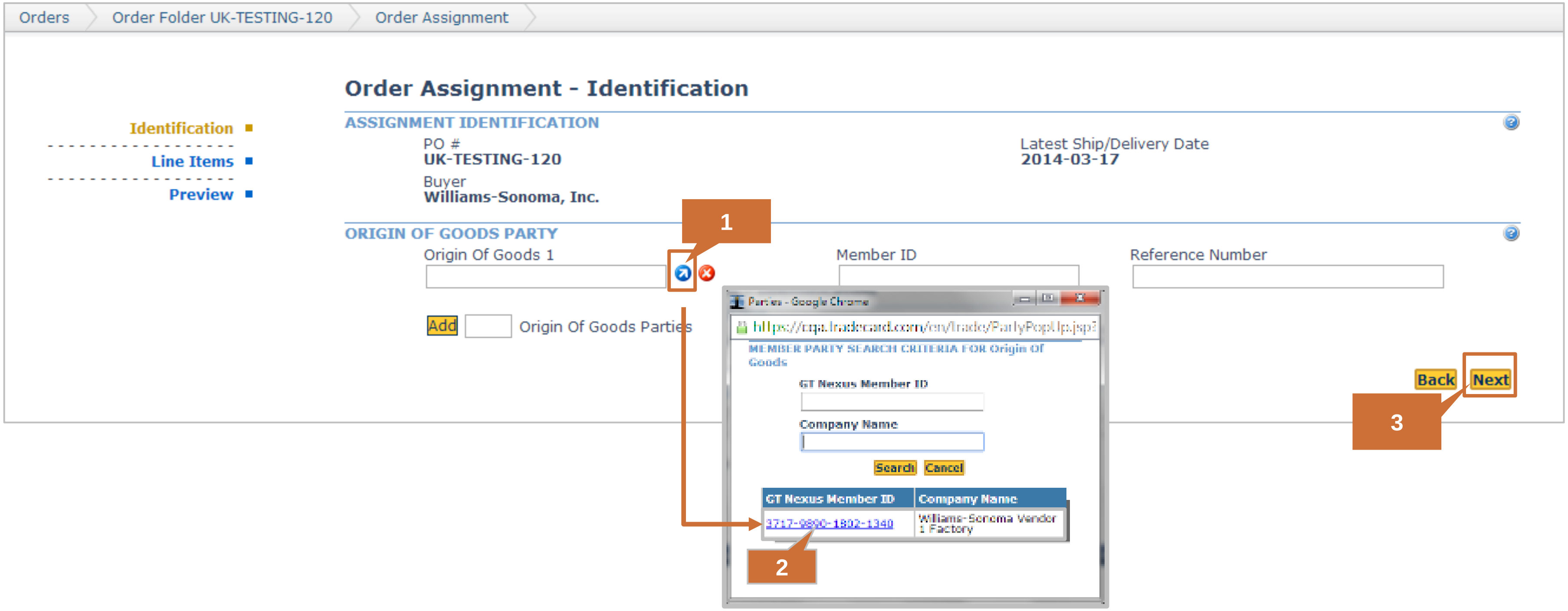
How to Complete an Order Assignment



To proceed the Order Assignment, complete the following steps.

1. Click **Task** to go to Task List page.
2. You may look for the designated Order Assignment by using the filters criteria, and then click **Refresh** to retrieve the requested data.
3. Find the designated **Order Assignment.** And Click the **Order Assignment** hyperlink or **Create**. And then you are directed to **Order Assignment – Identification page**.

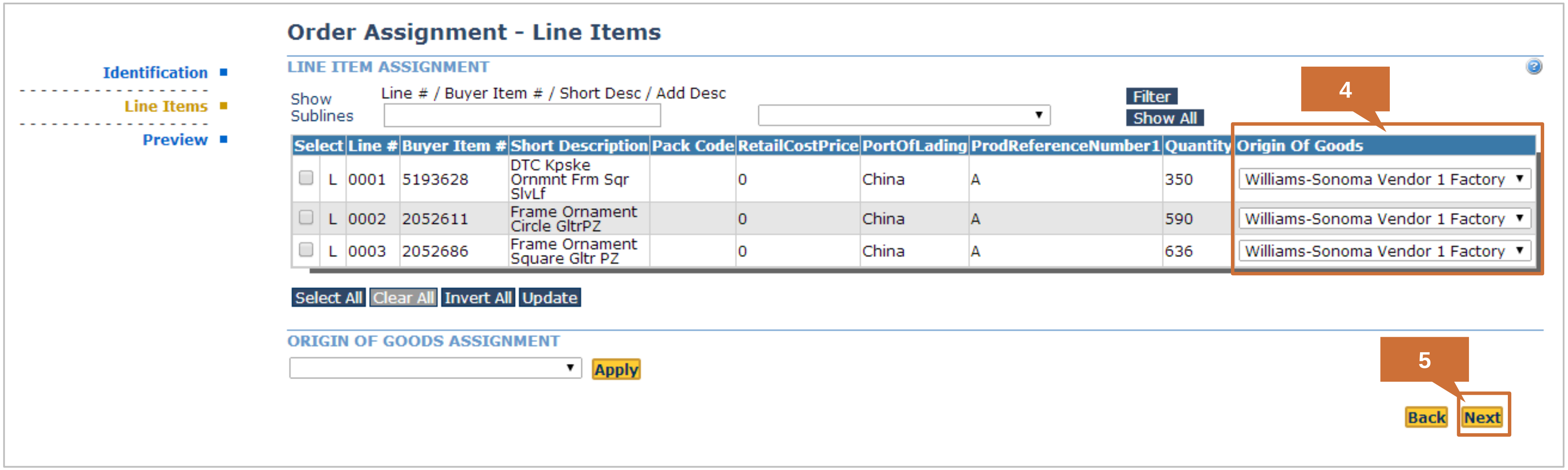
How to Complete an Order Assignment, continued



To proceed the Order Assignment, complete the following steps (continued).

1. Mouse over **Origin of Goods 1** box and click the blue arrow icon to select a Factory.
2. Select a factory presented on the address book.
3. Click **Next**.

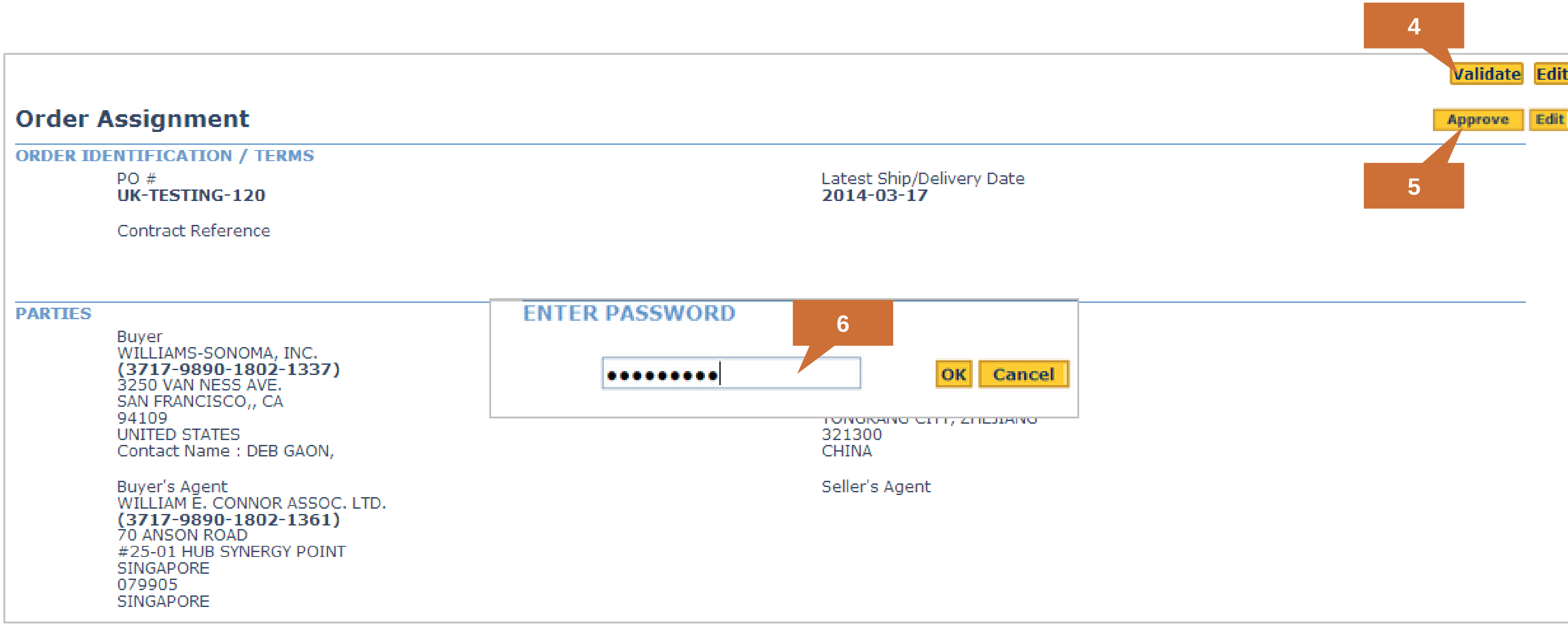
How to Complete an Order Assignment, continued



To proceed the Order Assignment, complete the following steps (continued).

4. Check if the **Origin of Goods** are assigned to the factory accordingly.
5. Click **Next**.

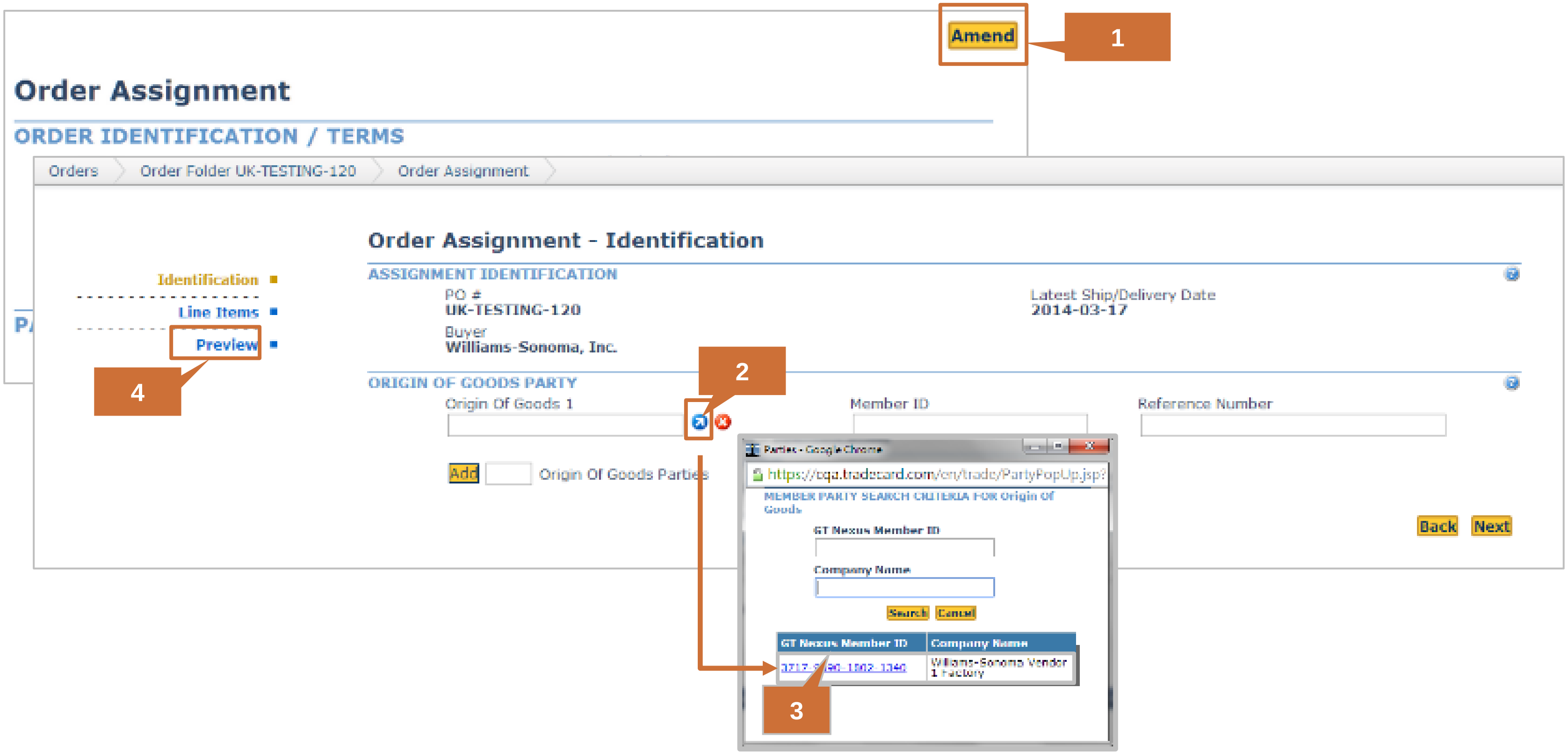
How to Complete an Order Assignment, continued



To proceed the Order Assignment, complete the following steps (continued).

6. Review the assignment and click **Validate**; alternatively, any factory change required, you can always click the **Edit** button to change the assigned factory before final approval.
7. Click **Approve**.
8. Enter your **password** and click **OK** to complete the assignment and upon the approval of the document, the Purchase Order will be visible to the assigned factory.

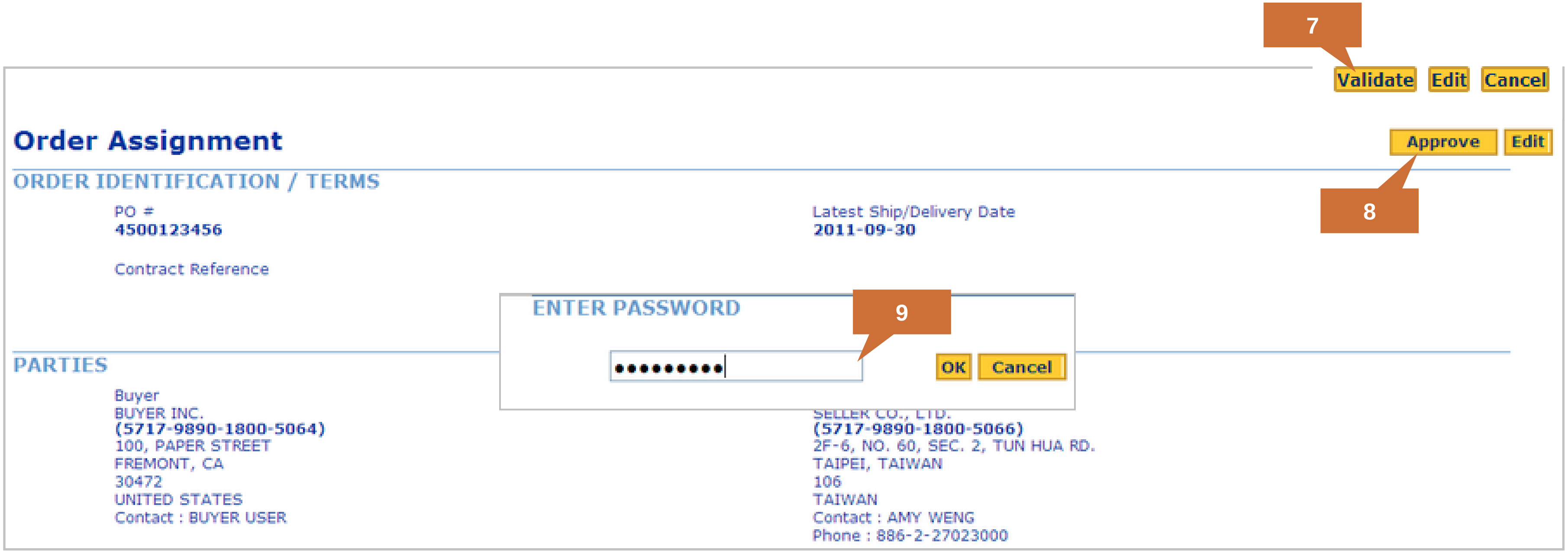
How to Amend an Order Assignment



To amend the Order Assignment, complete the following steps.

1. Open the designated Order Assignment document you want to change the factory to and click **Amend**.
2. Mouse over **Origin of Goods 1** box and click the blue arrow icon to select a Factory.
3. Select a factory presented on the address book.
4. Click **Preview**.

How to Amend an Order Assignment, continued



To amend the Order Assignment, complete the following steps (continued).

5. Review the assignment and click **Validate**.

Note: You may also click **Cancel** to cancel the amendment.

6. Click **Approve**.

7. Enter your **password** and click **OK** to complete the amendment and upon the approval of the document, the Purchase Order will be visible to the current assigned factory.

Reports

- Overview
- How to run a report
- How to schedule a report
- About designing a new report
- How to design a new report
- How to copy a report
- How to delete a report
- How to edit a report
- Tips

Reports Overview

- A real-time, on-line report generation tool is available on the GT Nexus system. The tool comprises both **Classic Report Designer** and **New Report Designer** that allows you to run, schedule or create report(s) that meets your reporting needs.
  - **Classic Report Designer** minimizes your report designing efforts in creating reports from the provided templates, where you will only design with the most commonly used columns.
  - **New Report Designer** provides greater flexibility to customize a report with special data inquiry needs, i.e. adding SQL system language as **Formula** or setting **Filters** or **Prompts** to narrow down the data output.

  Note: You must have the security right enabled to execute reports. If you do not, contact your account administrator for assistance
- Reports designed by either **Classic** or **New Report Designer** can provide document status information, evaluate documents compliance within a community, manage payments, track the packing & shipping status and schedule report delivery.
- In addition to designing capability, this tool allows you to run and schedule reports at specific time and date.
- Reports can be delivered in various formats, including **CSV**, **PDF**, **Tab Separated Text**, **Formatted Text**, **HTML**, **Excel** and **XML**.
- Reports and reporting related features can be accessed from the **Reports List** page.

Reports categories

Category	Description
Administrative	These reports are designed to assist GT Nexus account administrators within an organization. Account Administrators can use these reports to manage and analyze users task flows (a task flow shows a users task assignments).
Management	These reports are designed to assist managers of buyer organizations. These reports contain information about payments to vendors, product details, and invoices settled.
Payment	These reports are designed to assist the financial professional of an organization with accounting information of all transactions that are pending payment or have been settled. These reports are available to both buyers and sellers.
Transaction	These reports are designed to provide detailed information about all transaction from procurement to fulfillment such as order status, line item balances, shipment balances, order balances, document status and more. Some transactions reports focus on your workflow and provide information related to tasks that need to be completed by document type and/or user.

WSI Custom Reports

The following reports where developed for WSI.

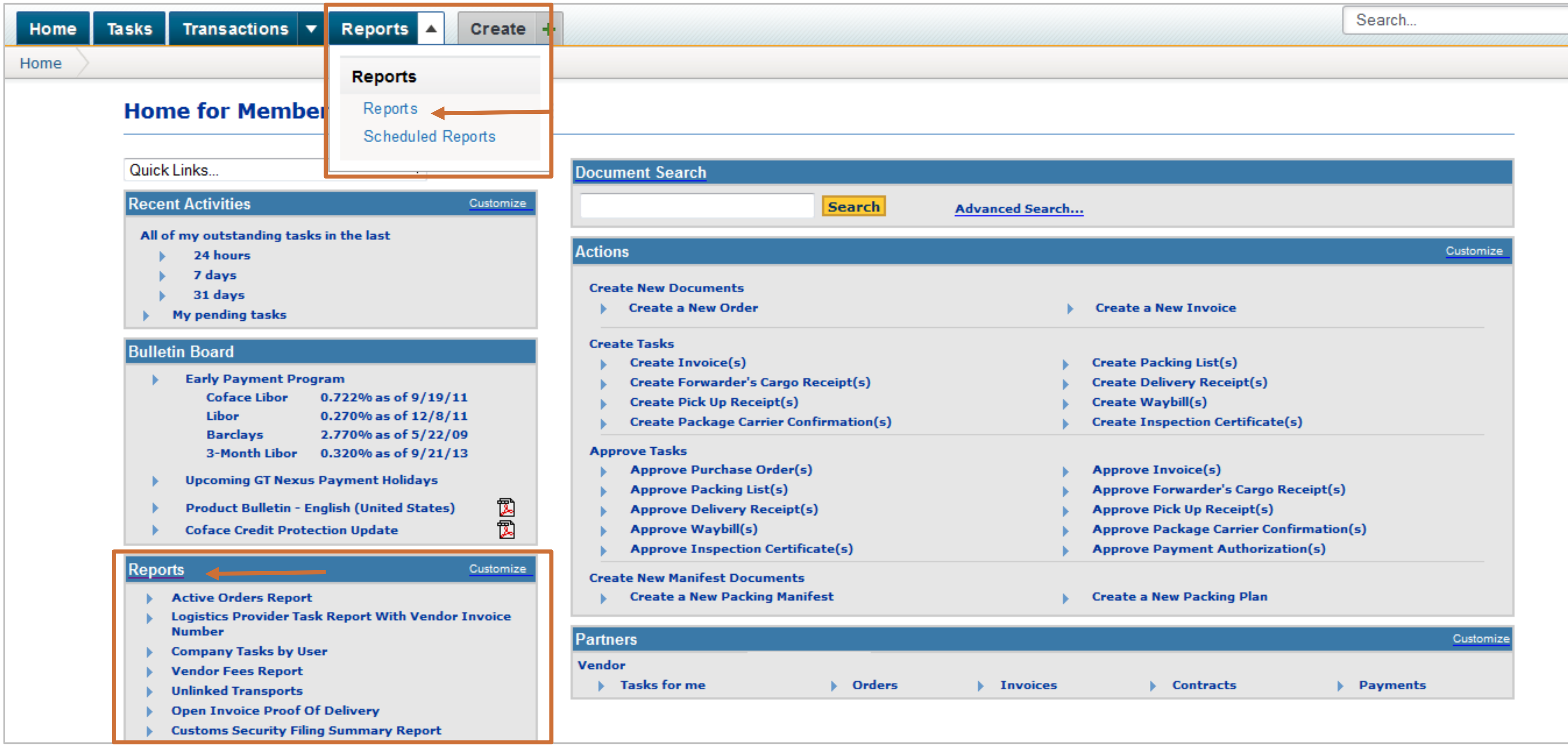
Report Name	Description	Audience	Delivery Schedule
POC Status Negotiation Complete	This report displays all orders with a status of “Negotiation Complete”.	WSI	Run on demand
POC Status PWR – Negotiate	This report displays all orders with a status of “PWR Negotiate”.	WSI	Run on demand
POC Status PVR - Confirmed	This report displays all orders with a status of “PVR Confirmed”.	WSI	Run on demand

PWR: Pending WSI Review

PVR: Pending Vendor Review

Note: Users must have applicable security rights to design and/or edit reports.

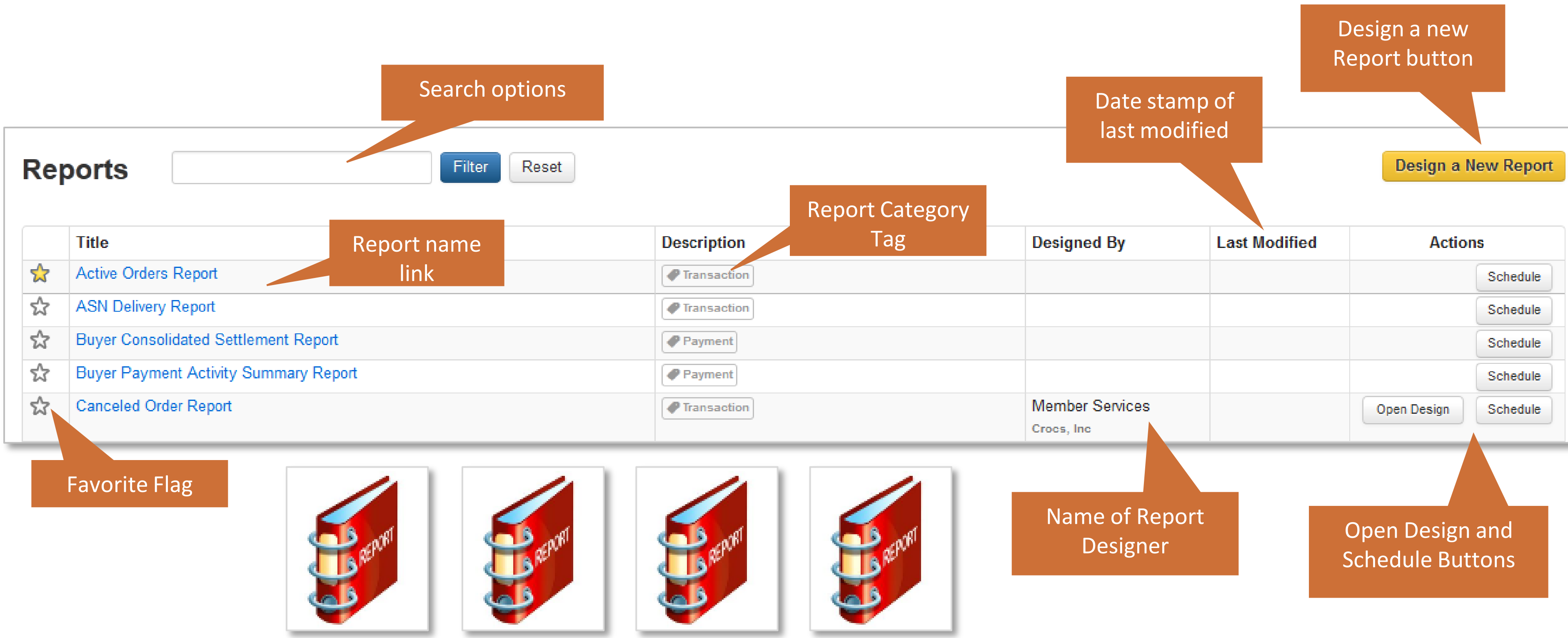
How to access the reports list page



To access the report, complete the following steps.

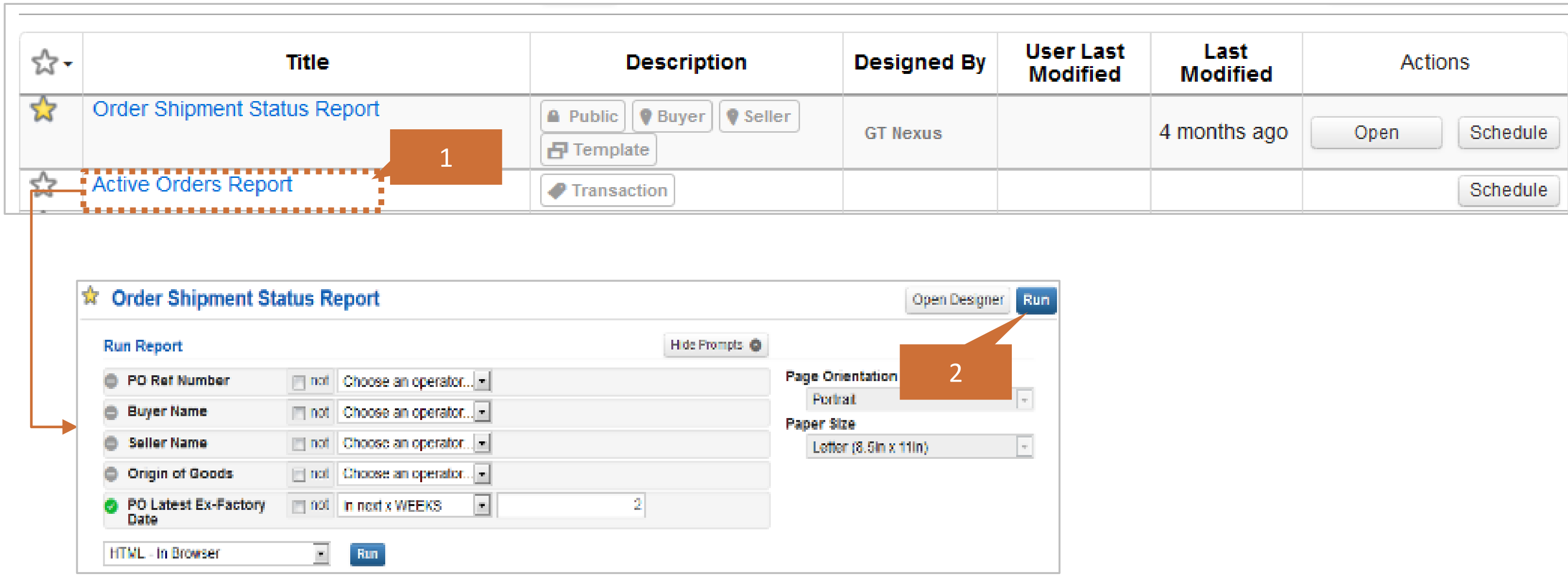
1. From the **Navigation** tab, click the **Reports** tab and select **Reports** from the drop-down menu.
2. From the Home screen click the Reports name link.

About the Reports List Page



- To filter a report, enter any part of the report title (i.e. **Order**) and click **Filter**; Reports contained the key word will be displayed. Click **Reset** to clear the filter.
- Click the ☆ icon to flag the report as your favorite and it will always display on the top of the list.

How to Run a Report



From the **Reports List** page, click the **Report Title** to run the report(s).
Note: The report format may either be in **Classic** or **New** template subject to the report designer being utilized. Regardless of the report template, to run a report, simply complete the following steps.

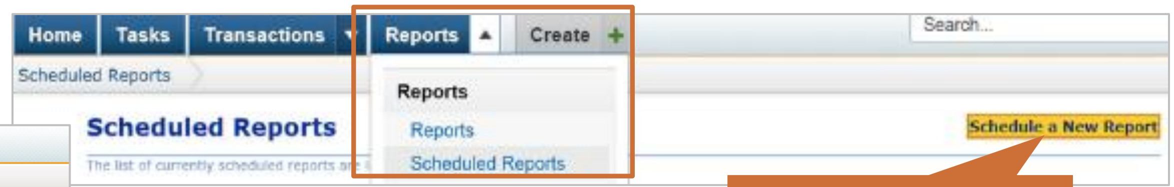
1. Click the Report **Title**.
2. A **Run Report** page with additional criteria/columns display for further selection. Select the applicable options from the Prompts displayed.
3. Select a **output format** from the **Choose a file type** dropdown list.
4. And a **page orientation/size**, click **Run** to generate the report.

Note: Time captured and displayed on the system is GMT time.

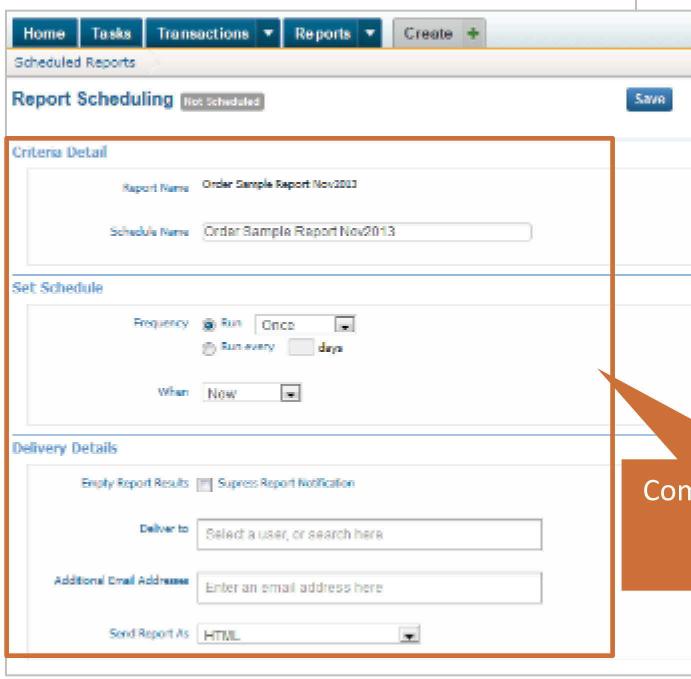
How to Schedule a Report

To schedule a report to run at designated times, complete the following steps.

1. Click **Reports** and **Scheduled Reports** from the drop-down menu.
2. From the displayed screen, click **Schedule a New Report** button. The **Reports List** page displays.
3. Scroll through the page to locate the applicable report to schedule. Click the **Schedule** button to the right of the report.



Click to select report to schedule.



Complete the criteria's, then click Save.

4. The **Report Scheduling** page displays.
5. Select the applicable **Criteria Detail**, **Set Schedule** and **Delivery Details**.
6. Click **Save**.

Note: Contact your administrator if you do not have security rights to schedule a report.

About designing a new report

The GT Nexus Platform has a report design tool that provides you with real time data and easy to use functions for quick and flexible custom reports generation.

The Report Designer is used to:

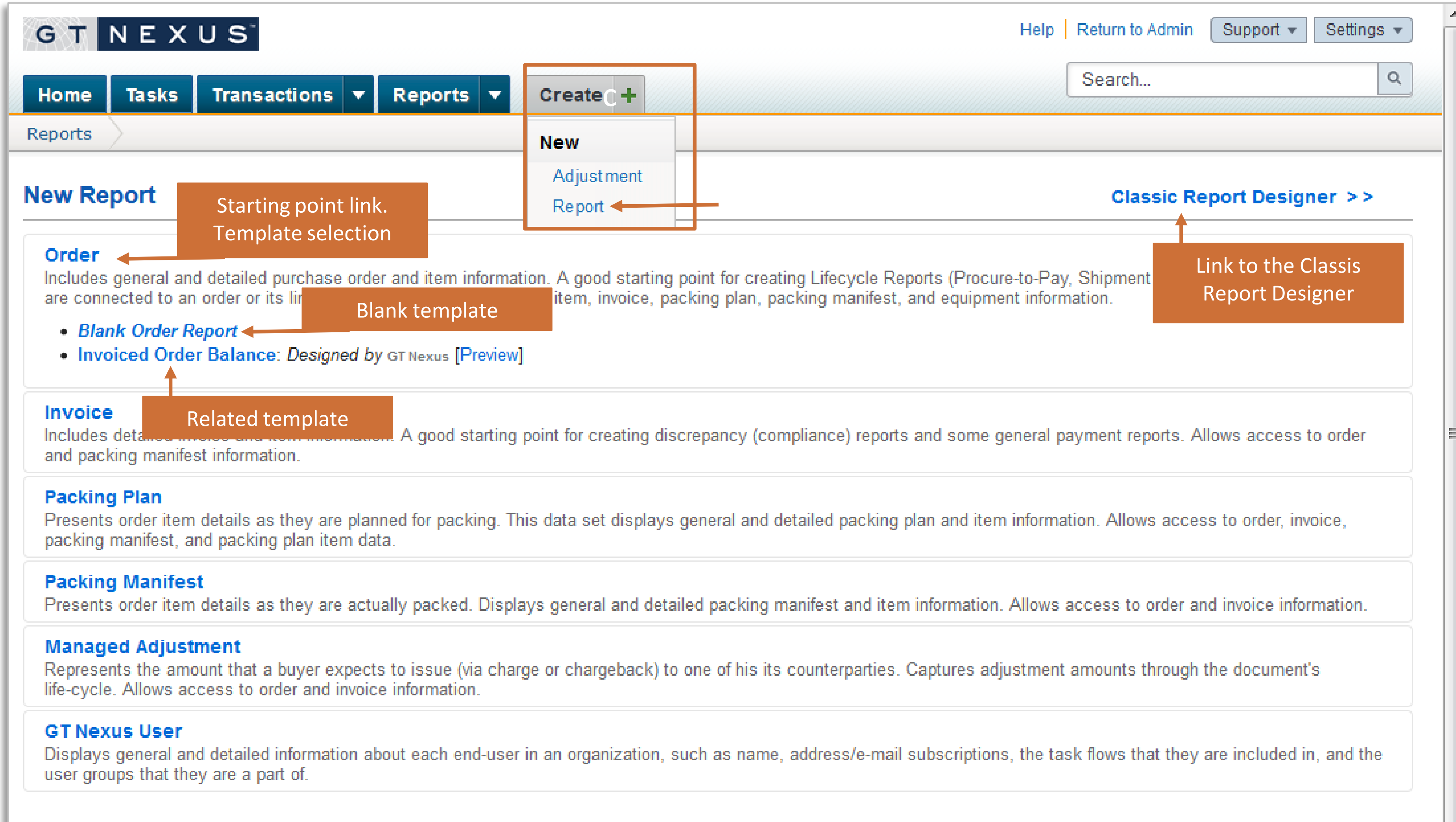
- Design and edit reports. Start with a template or design your own.
- Create reports from Orders, Invoices, Managed Adjustments, Pack Plans, Packing Manifests Advanced PO Collaboration and Work-in-Process tracking data.
- Drill down and get to data at the sub-line item level.
- Publish and share reports and report templates in your organization and partner communities.
- Manage reports by using tags, descriptions and saving to favorites,
- Build formulas, create filters and report prompts for other report users
- Specify sort and detail layout settings
- View report data in a summary or detailed format

Plan your report design and determine what specific information you want to see in the report and who the report is for.

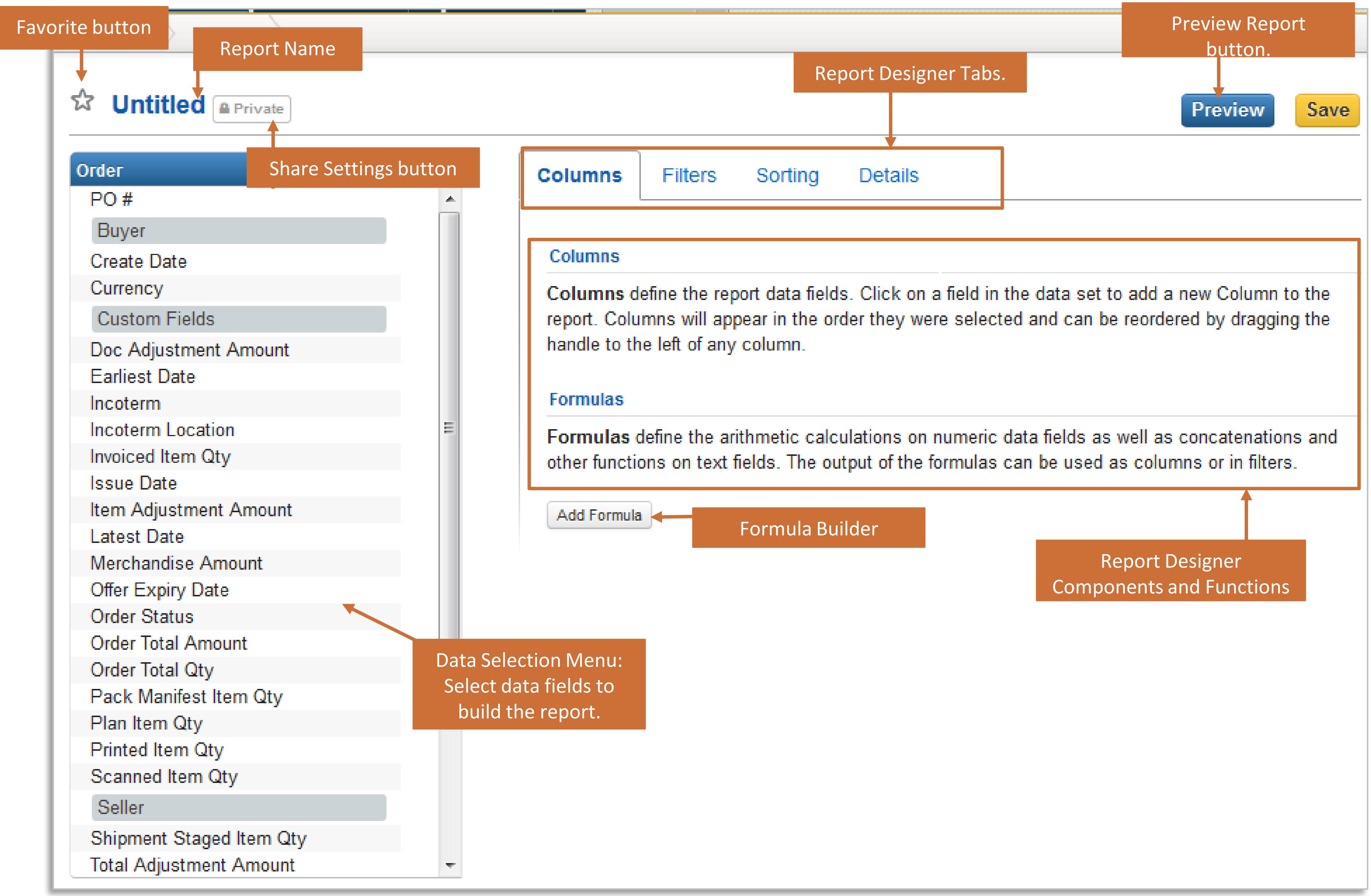
When creating a new report you will need to specify the following:

- Report Name
- Share Settings
- Columns
- Filters and/or Prompts
- Sorting
- Additional Details

See a sample of the design a New Report page below.



See a sample of the Report Designer page below.



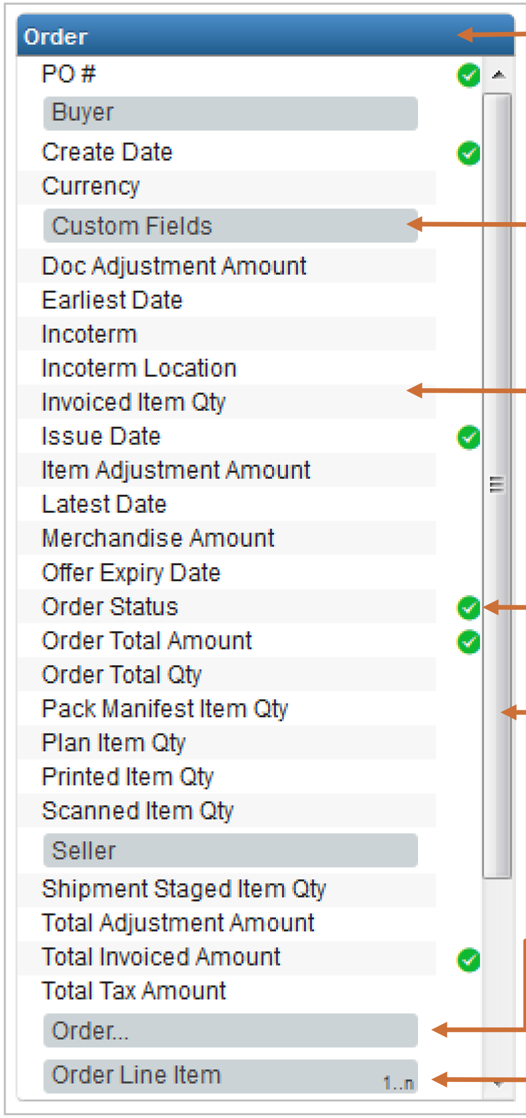
Navigating the Data Selection Menu

The Starting Point is identified by the dark blue bar at the top of the Data Selection menu. The Data Selection menu holds an alphabetical list of individual header level fields and field groups. This includes starting point line items and linked data sets displayed at the bottom end of the menu.

Any field that is highlighted in dark blue or grey identifies a data may include:

- Data Groups with detailed header level fields associated to Parties, Custom Fields, etc.
- Linked Data Groups (highlighted in the menu) reference Starting Point line item data, e.g. Order Line Items, or header and line item data from processes linked with the starting point document and data.

See a sample of the Data Selection Menu below.



Starting Point shows the selected data set. Click to return to the top of the header level of the starting point data set.

Data Groups: Fields highlighted in darker grey identify a group of data fields. For example, Custom Fields is a Data Group when selected custom fields for this organization will display.

Header Level Data fields: Key fields, and commonly used fields are displayed alphabetically below the starting point.

The **Green checkmark** identifies fields that have been selected for the report.

The scroll bar: Use to move up and down the Data Menu to select data.

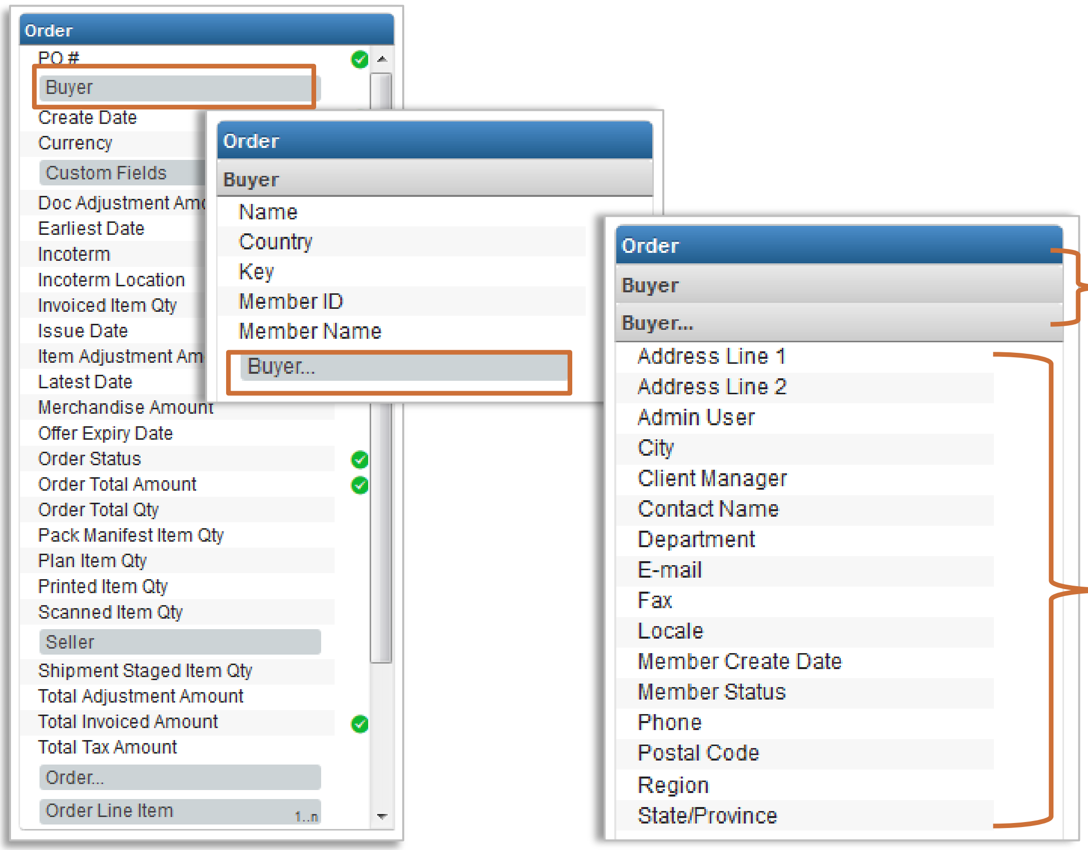
Extended Data: The ellipsis (…) on the highlighted field indicates additional groups are available; click to extend the list.

Linked Data Sets: Highlighted fields with 1..n / 1..1 opens to **a)** Line Items level fields of the Starting Point, or **b)** Header and Line Item level data from other associated data sets.

Using the Data Selection Menu

Once data is selected, unless a new selection is made, the data view will remain as is when switching to other tabs in the report design panel.

The following figure illustrates how drilling in and scrolling up and down among header level data and data grouping (buyer) is displayed.



Manu Headers will display the order and level of the data view. Click the Header bar to go back to that menu.

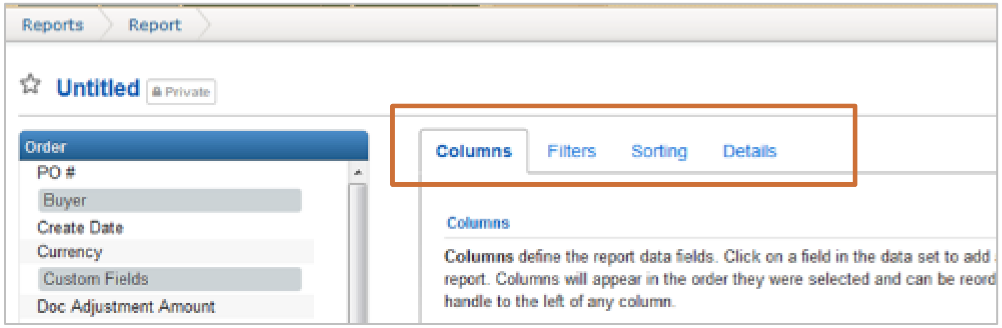
Additional header fields are shown.

About the designer tabs

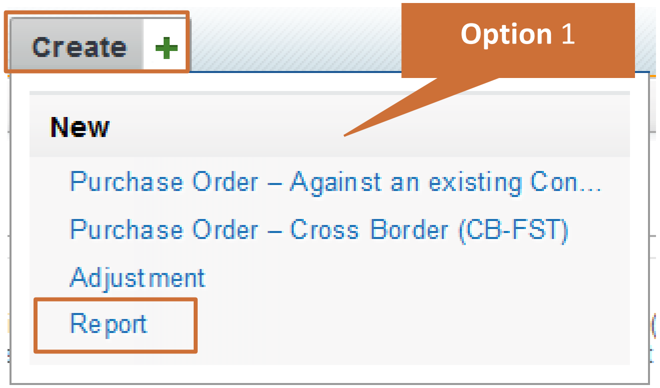
Use the designer tabs to build your report.

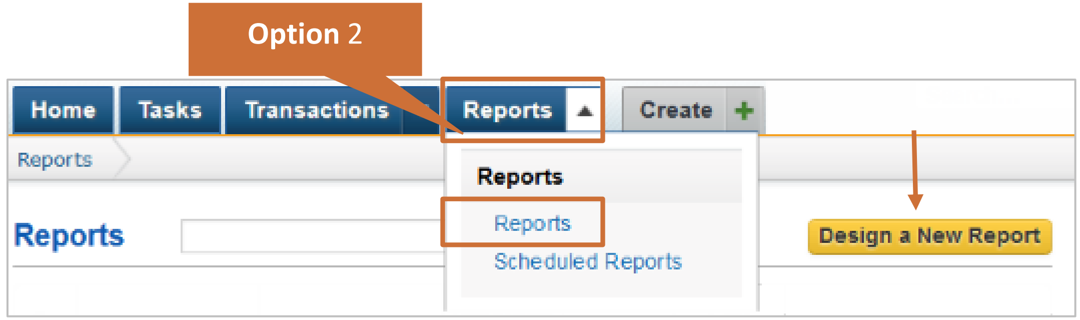
Below is a table describing each tab.

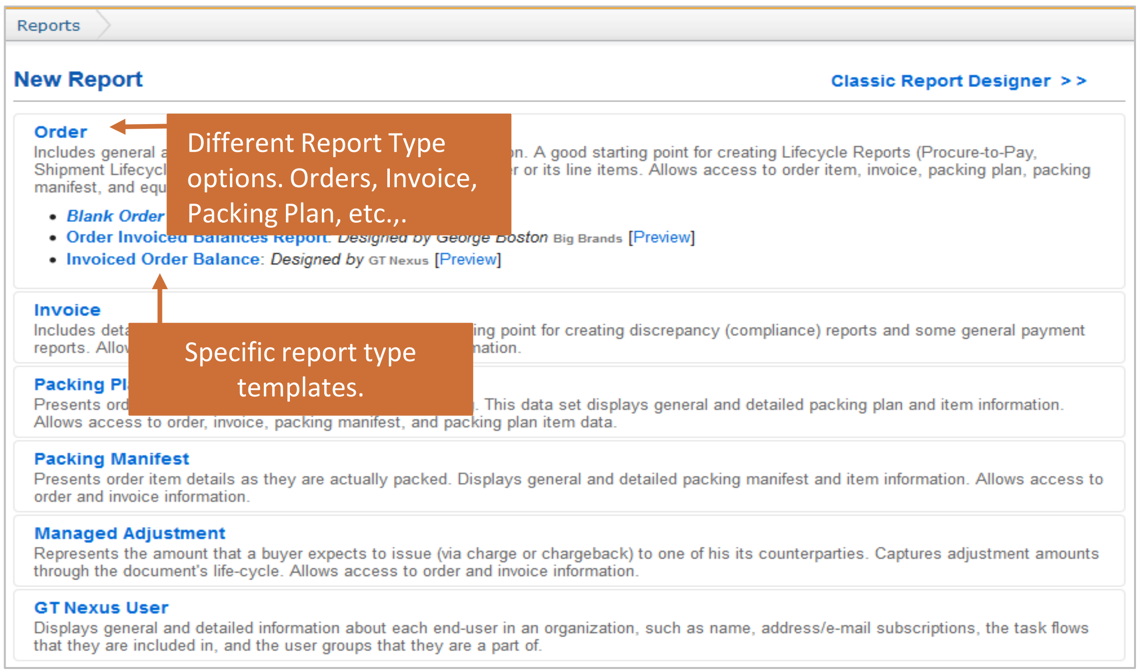
Category	Description
Columns	In the columns tab users can select data fields to display in the report as columns. And update the column labels (names) and group applicable data.
Filters	The filters tab allows users to add Filters and/or Prompts. Filters and Prompts define the output limitations of the report data. Prompts are filters that capture report criteria at the time of execution. Prompt(s) can be designed as 'required' by checking the Required when adding.
Sorting	The Sorting tab allows users to determine the order and direction of the report output. Data may be sorted in an ascending or descending direction.
Details	The Details tab allows users to add specific details to the report. Enable Sub totals, Paper Size, Categories, label as Template, etc..,



How to design a new report





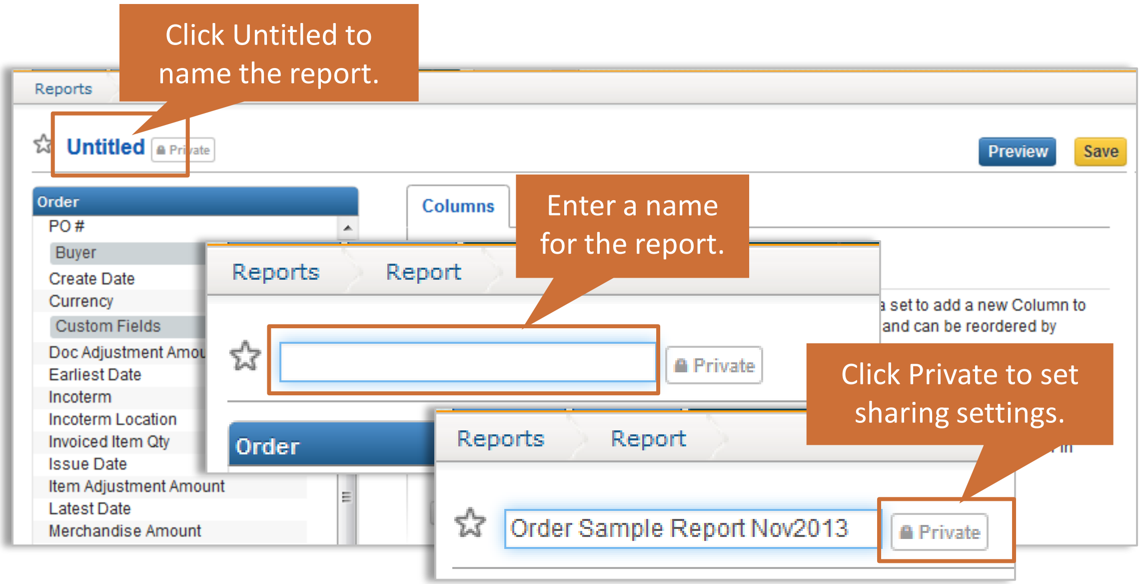


To design a new report, complete the following steps.

1. Access the new report designer:
   a. Click the **Create** tab, then **Reports**.
   b. Click the **Reports** tab, then **Reports** again. Then, click **Design a New Report** button.
2. The **New Report** page displays. Select a report type to start with, e.g. **Order** report.
3. Select a template to design your report, e.g. **Blank Order Report**.

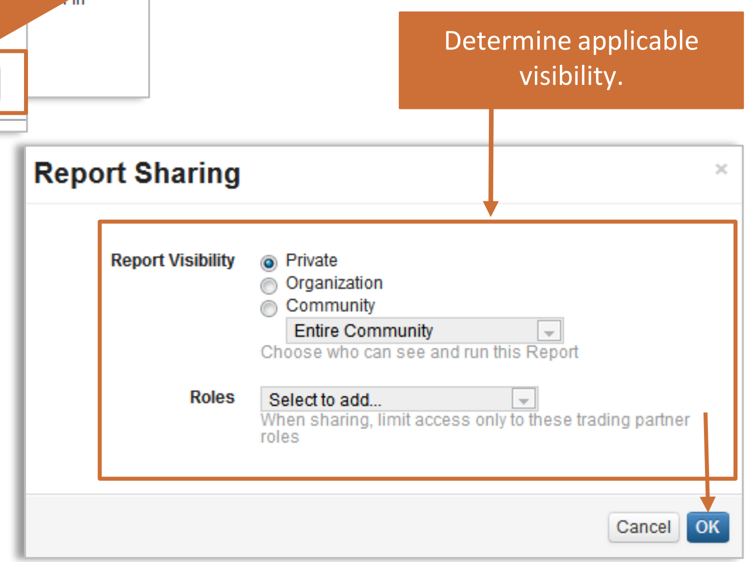
Note: Users can update classic reports by clicking the Classic Report Designer link.

How to design a new report, continued



To design a new report, continued.

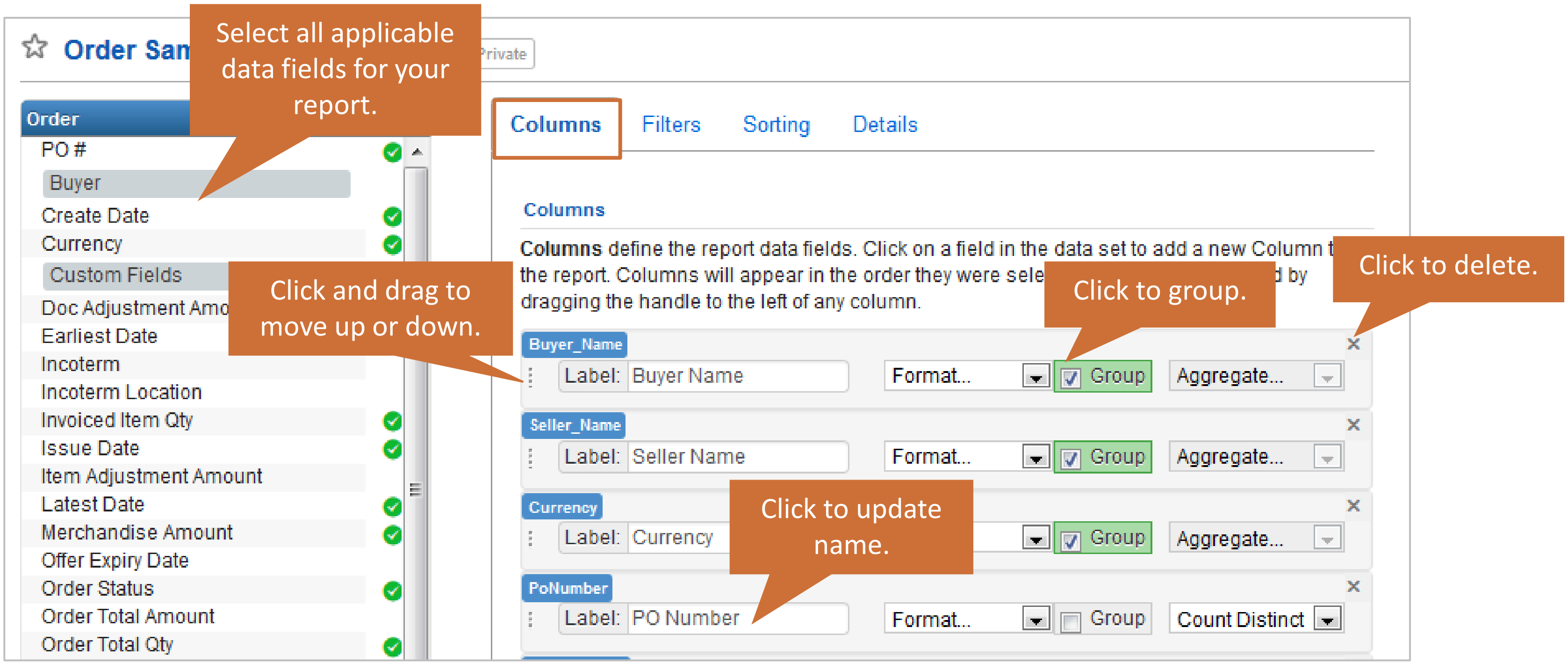
4. Click the **Untitled** link to name the report. Enter a unique name for the report.
5. Click the **Private** button.
6. The **Report Sharing** window displays, select the applicable report sharing setting. Click **OK**.



Use the table below for a description of each Sharing Setting option.

Sharing Option	Description
Private	Select **Private** to keep the report private, you will be the only one that can view and run the report (default).
Organization	Select **Organization** to share the report with anyone in your organization who has the appropriate report rights.
Community	Select **Community** to share the report with your partner communities. In addition, you can specify what roles within a community, e.g., Logistics Service Provider, can view the report.

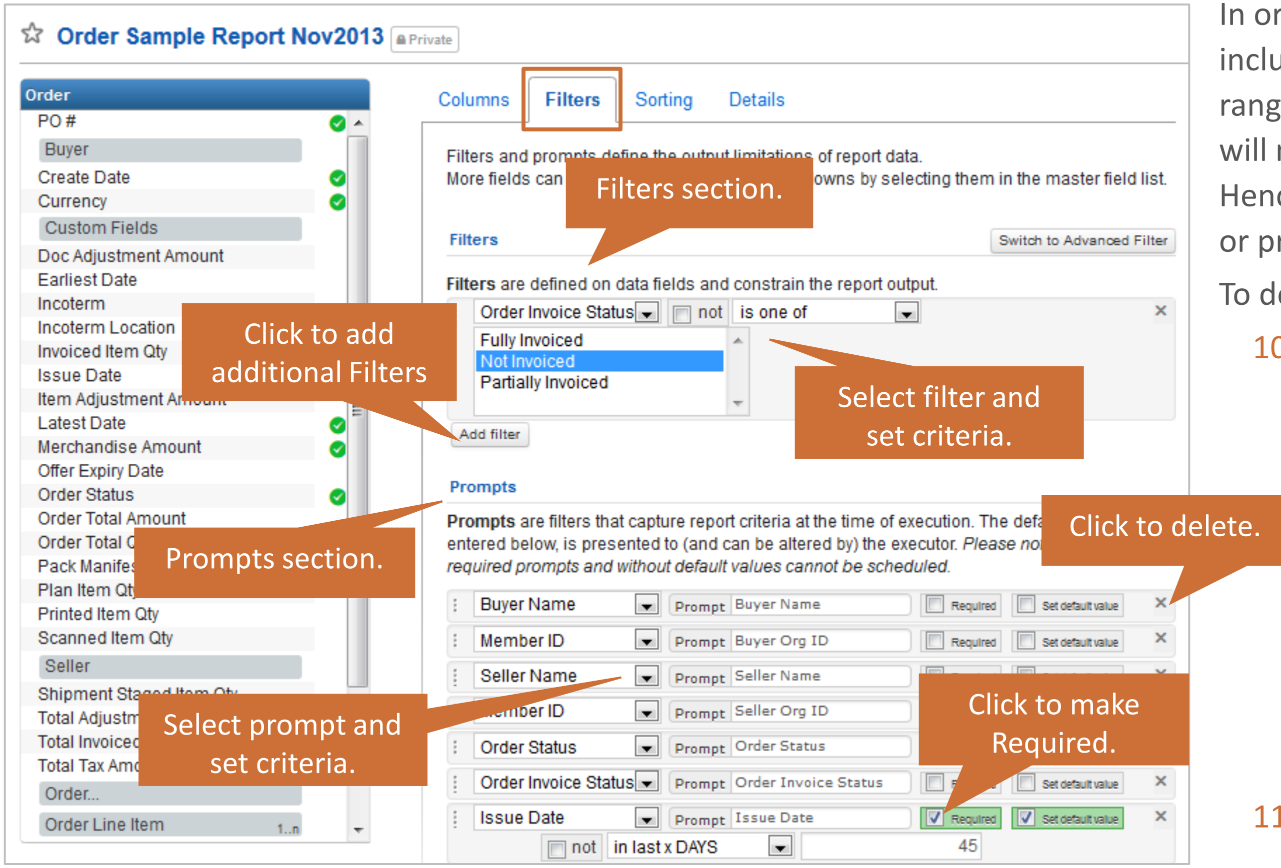
How to design a new report, continued



To design a new report, continued.

7. Use the **Data Selection Menu** to select data fields for your report.
8. The data fields selected will display under the **Columns** tab. These fields will be Columns in your report.
9. Under the **Columns** tab you can,
   - Update the column name by clicking the **Label** field
   - Organize the order of the columns by grabbing and dragging the field
   - Determine if data should be grouped by clicking the **Group** checkbox
   - You can delete a selected data field by clicking the **X** icon

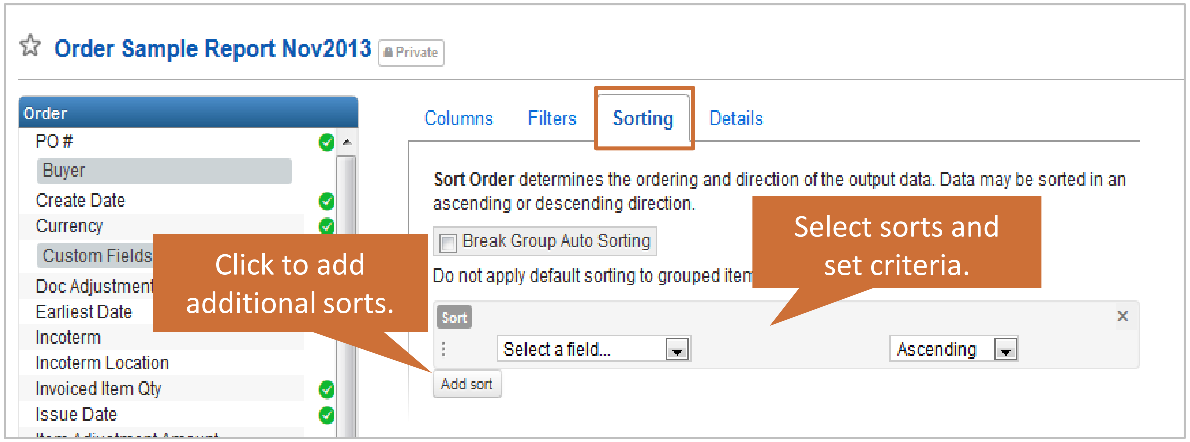
How to design a new report, continued



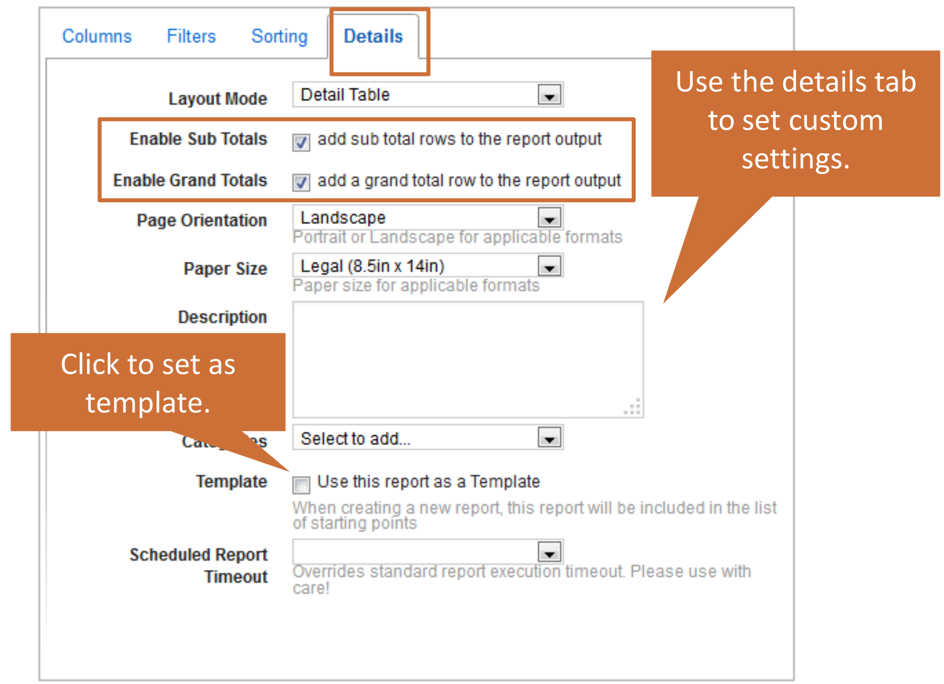
In order to run a report, users are required to include a filter and/or prompt to set a query range of data. Otherwise, the report output will not be set and the query will time out. Hence, all reports must be saved with a filter or prompt or a warning will display.

To design a new report, continued.

10. Click the **Filters** tab. Click **Add Filter** and select applicable filters for your report.
    - More filters can be made available by selecting them in the Data Selection Menu. Fields selected in the Filters tab will not display as a column in the report. These fields are used as filters and/or prompts only.
11. To add additional **Filters** click the **Add Filter** button.
12. Scroll to the **Prompts** section.
13. Click **Add Prompt** and select applicable prompts for your report.
    - Prompt are filters that capture report criteria at the time of execution. You can choose to make the prompt(s) “required” by clicking the Required checkbox.
14. To add additional Prompts click the **Add Prompt** button.
15. Click **Save**.

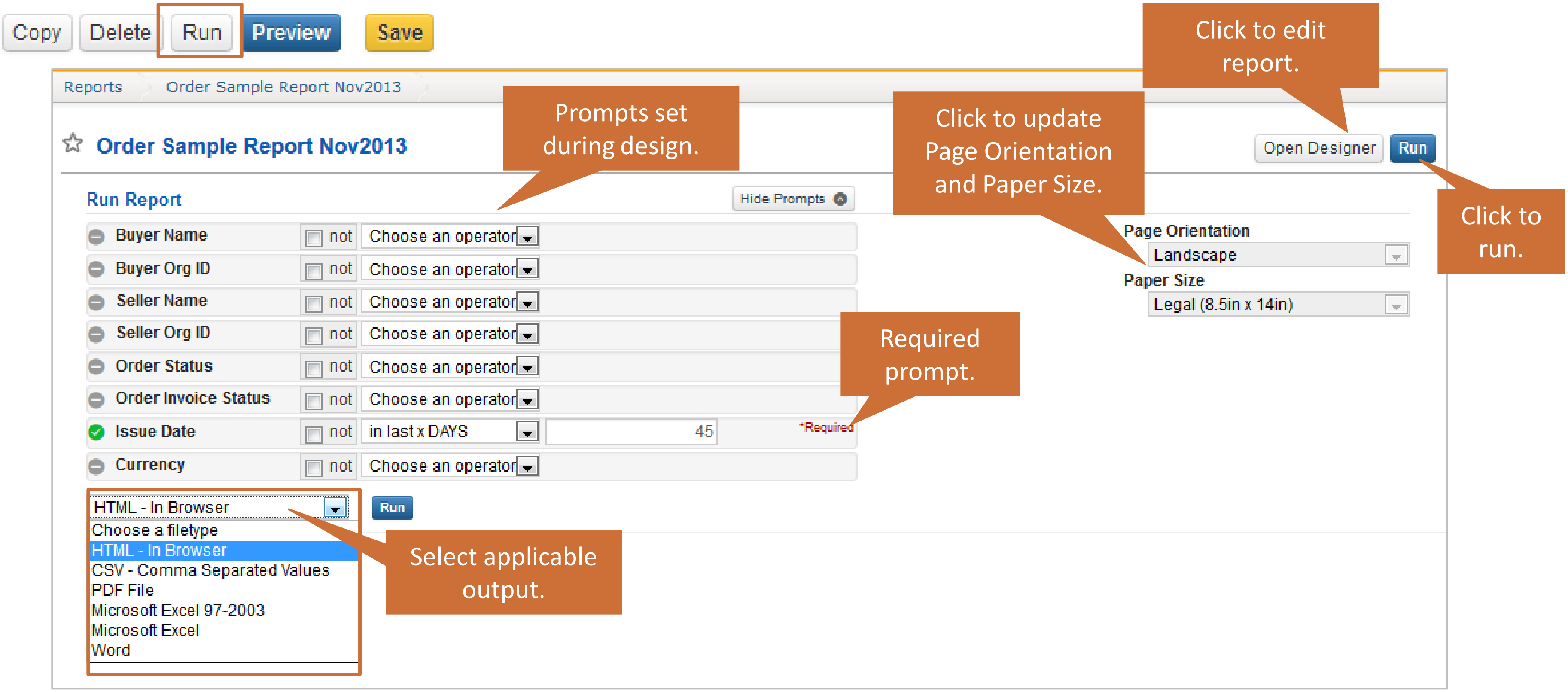


16. Click the **Sorting** tab.
    - In the Sorting tab users can determine the order and direction of the report output. Data may be sorted in an ascending or descending direction.
17. Click the **Add Sort** button. Determine the applicable sort for your report.
18. To add additional sorts click the **Add Sort** button.



19. Click the **Details** tab.
    - In the Sorting tab users can add specific details to the report. **Layout Mode**, **Description**, **Paper Size**, **Categories**, etc.,.
20. Users can also enable **Sub Total** and **Grand Totals** in the details tab. Its recommended that these options are enabled when you have used "**Grouping**" within the report (in the **Columns** tab).
21. Click **Save**.

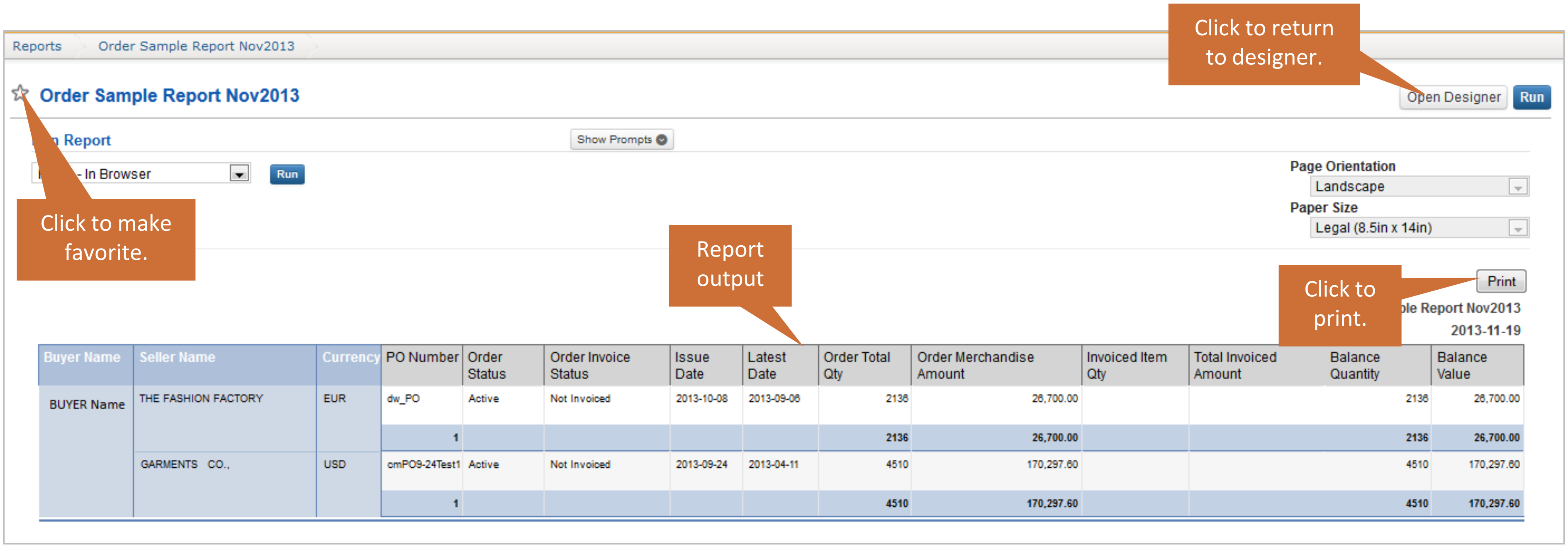
How to design a new report, continued



22. Click the **Run** button.
23. The **Run Report** page displays. All prompts set for this report display. Required prompts display *Required to the right of the filed.
24. Users can update the **Page Orientation and Paper Size**.
25. Select the applicable output for the report, **HTM – in Browser** defaults.
26. Click **Run**.

How to design a new report, continued

Below is a sample of the Sample Report created in an HTML – in Browser output.

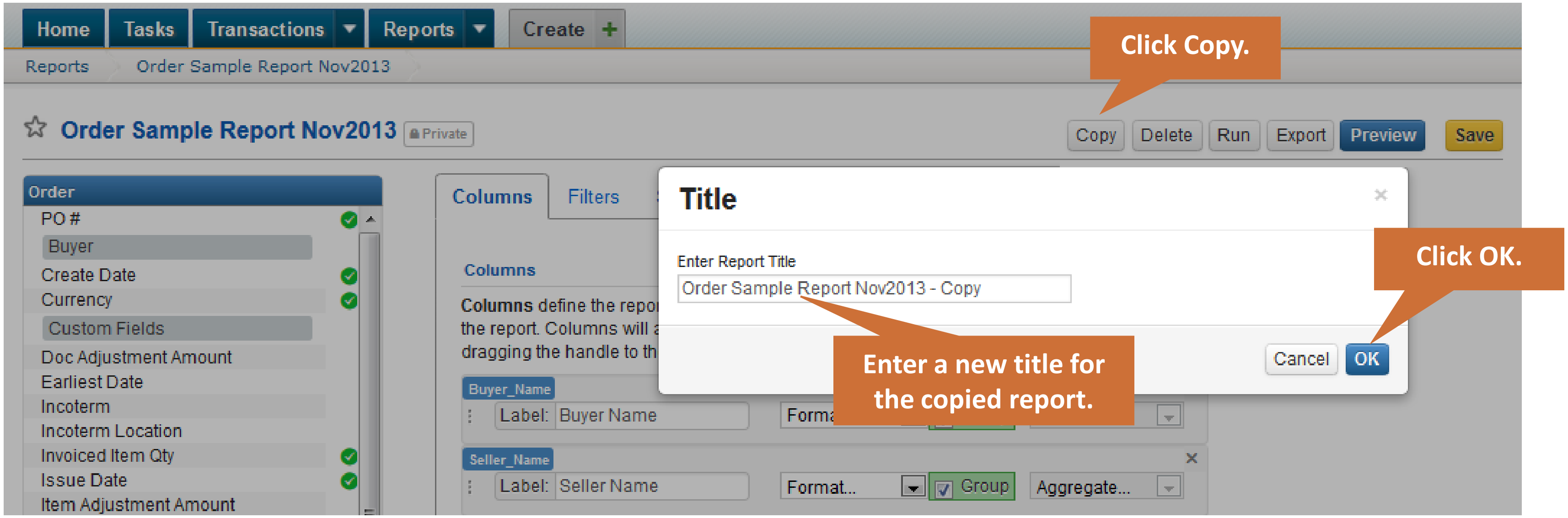


- Click the **Print** button to print the report.
- Click the **Open Designer** to return to designer page.
- Click the **Star** icon to make the report a favorite.

How to copy a designed report

To copy a designed report, complete the following steps.

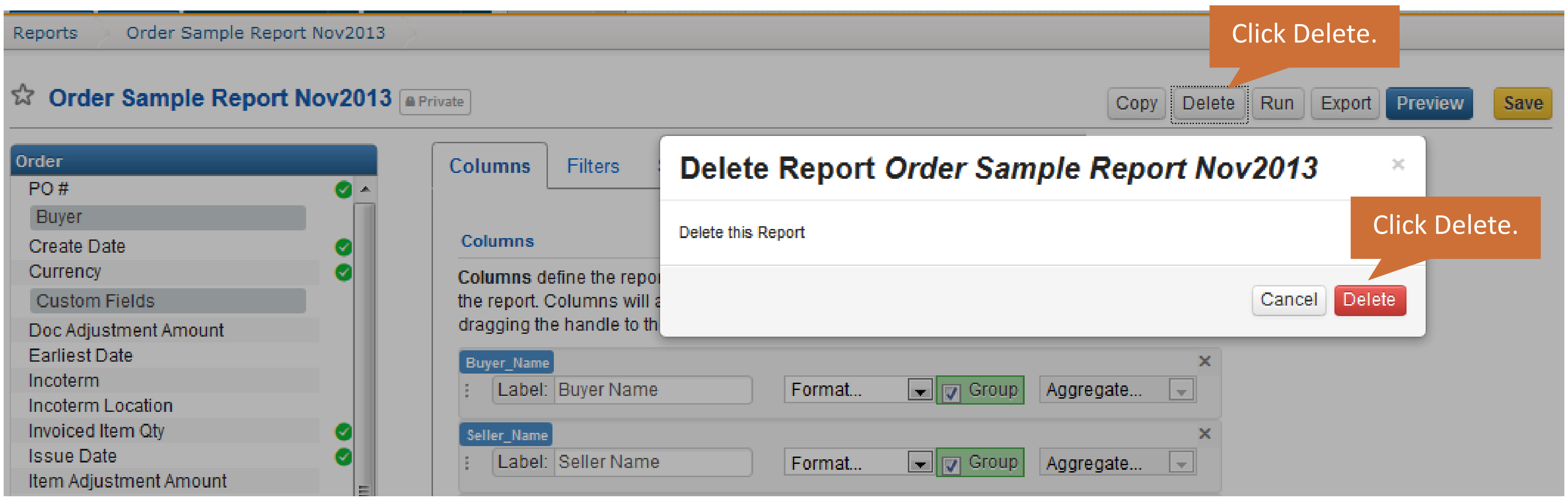
1. Find the applicable report you would like to copy.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays. Click the **Copy** button.
4. The **Title** pop-up window displays. Enter a title for the new copied report.
5. Click **Ok**.



How to delete a designed report

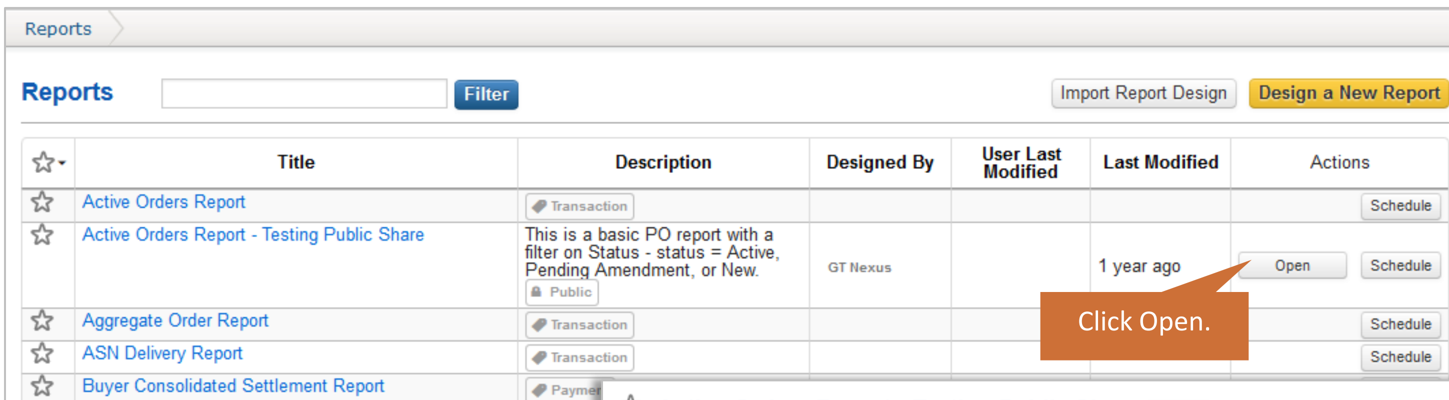
To delete a designed report, complete the following steps.

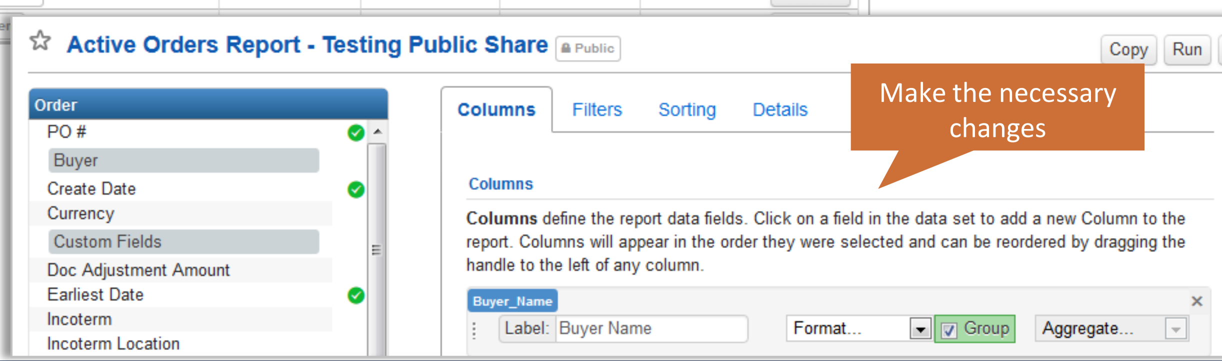
1. Find the applicable report you would like to delete.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays. Click the **Delete** button.
4. The **Delete** pop-up window displays, click **Delete**.



To edit a designed report, complete the following steps.

1. Find the applicable report you would like to edit.
2. Click the **Open** button in the **Actions** column.
3. The **Report** page displays, make the appropriate changes to Columns, Filters, Sorting, and Details tabs. Click the **Preview** button.
4. Click **Save**.





Note: Only the original creator can make edits/changes to the report.

Reporting Tips

- If the Start Date and End Date are left blank, an error message will display.
- A report can only be saved if its been named and at least one filter and/or prompt has been set.
- Click the Star icon located next to every report name to make the report a favorite.
- Only the user who created the report can make edits to it.
- Create a report template – set as ‘Template’ in the Details tab, and share with your organization – select Organization from the Report Sharing window.

Administration

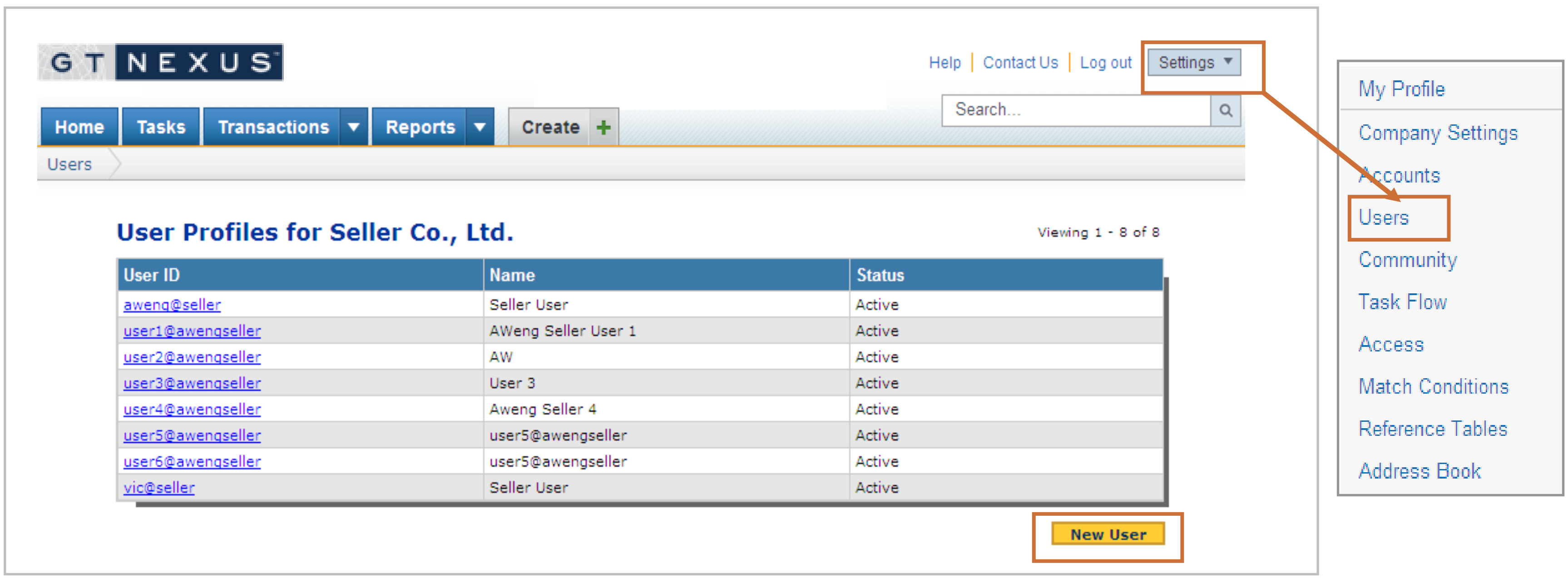
About Administration

- **Assigning the Administrator for Your Account**
  - The person listed as the contact in the application is the default administrator. The administrator has the option of carrying out administrative functions or delegating this responsibility to other users. If the current administrator wants to be taken out of the workflow, the newly created administrator can accept the rights from the current administrator.

- **The Administrator Manages Key Areas of the Company's Account, Including:**
  - Delegating Administrator Function
  - Adding New Users
  - Managing User Profiles, Security and Task Flows
  - Resetting Passwords
  - Generating Reports

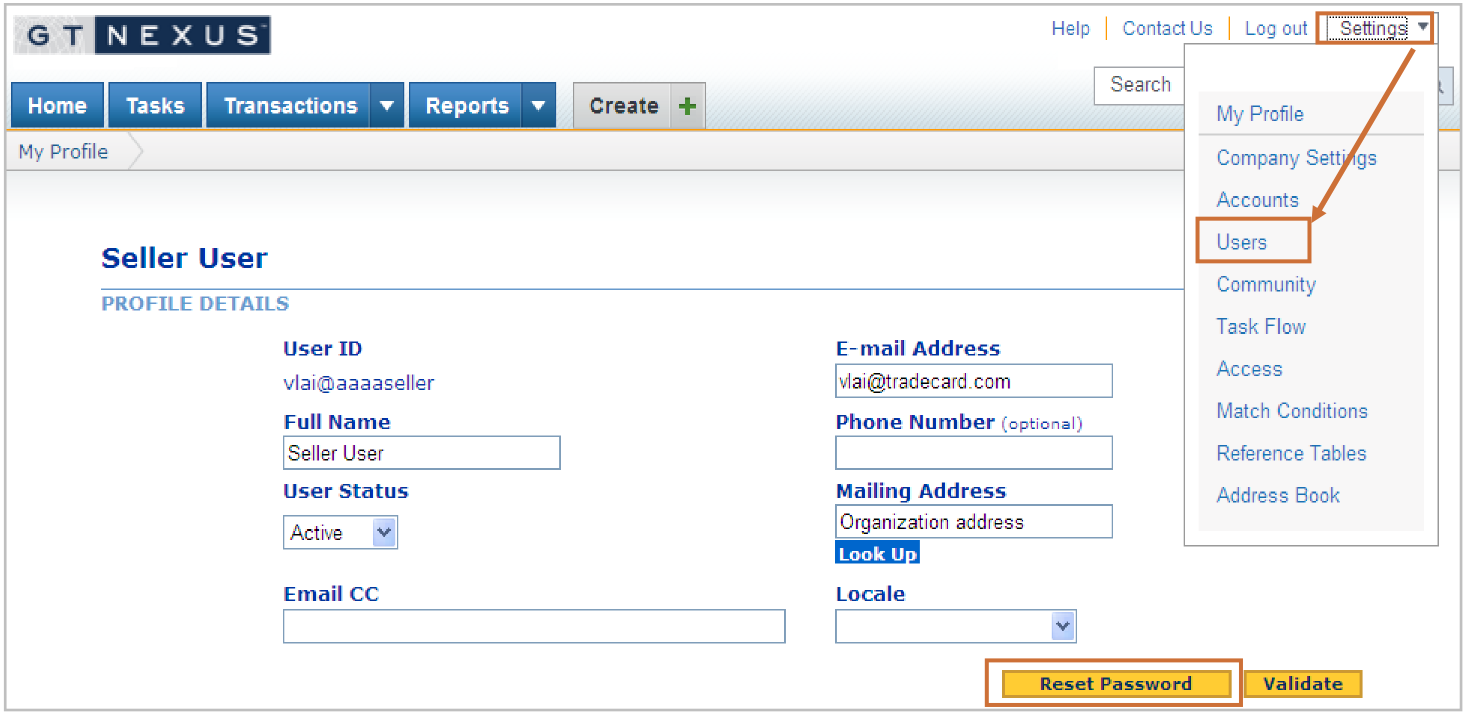
How to Manage Users

- Administrators can manage their organization’s users within the system. Click **Settings** > **Users** at top right corner of the web page to add, edit and confirm user profile information for users in your organization.
- Administrators have access to all user information and the ability to add new users, change user names, passwords and security rights.
- The E-ID card for new users will be issued and mailed to the customer within 4 weeks. A new user will not be required to enter an Access Code upon login until the user receives the E-ID card.



How to Manage User Profiles and Reset Password

- Use the **Settings** > **Users** tab to access the designated user profile. Administrators may change any user information except the User ID.
- Administrators also have the ability to reset another user's password.



How to Manage User Security

- A security profile defines precisely what actions a user can take within the system.
- Go to **Security Details** to view and make the selections.

SECURITY DETAILS

Grant	Security Right	Description
☑	Administrator	administration rights
☑	Attachment Rights	create, modify and cancel attachments
☑	Commercial Invoice	approve the commercial invoice document
☐	Dashboard Design Rights	rights to view, create, or modify Dashboard and Widgets
☐	Dispatch Manifest	rights to create, or modify Dispatch Manifest Document.
☑	Event Management Worksheet	rights to modify and approve event management worksheets.
☑	Existing User Management	manages existing users and their rights.
☑	Financing Request	creation and approval of financing for the requester
☑	Invoice Initiation	create commercial invoice and packing list documents
☐	Scorecard	rights to view, create, or modify scorecard designs and scorecard evaluations
☐	Seller Payment Instruction	create and approve the seller payment instruction document

Save Security

About E-mail Subscription

- E-mail notifications are a standard feature of the system. The E-mail Subscription table allows the user to receive a specific type of E-mail message based on the category selected.
- The E-mail subscription table allows a user/administrator to indicate which category of E-mails they want to receive. The user can select which E-mail categories they want to subscribe to by checking the box in the 'Select' column next to the specific category of E-mails the user wants to receive. If a user does not select a particular E-mail category, that user will not receive any E-mails pertaining to that category.
- There are two categories of E-mails generated by the system:
  - Task assignment notification
  - Event notification (such as a purchase order amendment notification, payment credit confirmed…etc.)

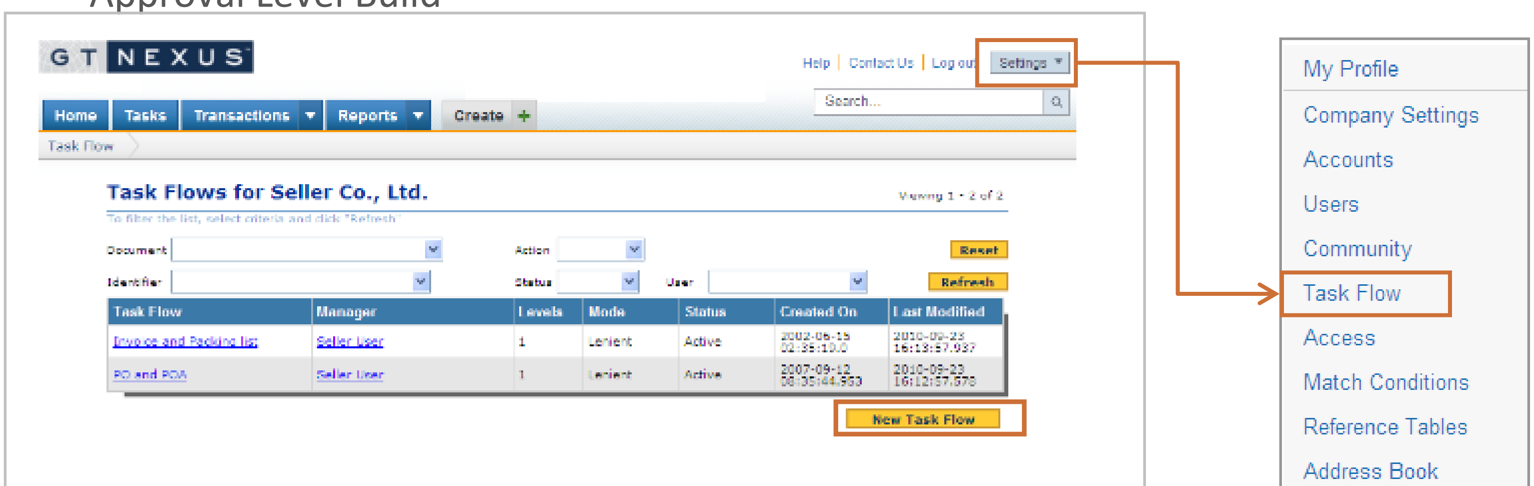
E-MAIL SUBSCRIPTION

Administrative Events All None

Selected	Event	Match Condition	Text	PDF	EXCEL
☐	**Task Assignment** An online task has been assigned	NA	X		
☐	**Password Change** Notification sent when the user password has changed	NA	X		
☐	**News and Updates** Notification of news and upcoming events related to our product and services	NA	X		
☐	**E-Identity Change** Notification sent when the authentication mode of a non-internal TC user is changed to EID	NA	X		

About Task Flows

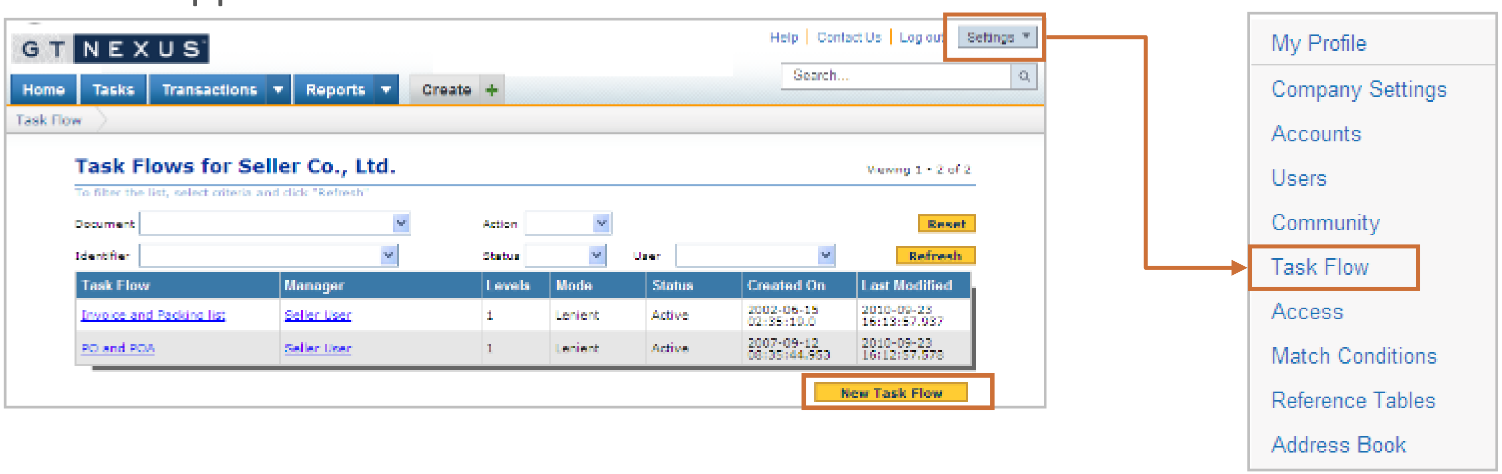
- A **Task Flow** is an administration feature that allows users to control how tasks are routed and assigned to active users in your organization. The system looks for instructions on how to handle document related tasks such as creating, finishing, and approving from the 'Task Flows' that are activated for use. An active task flow will enable you to direct user assignments to specific users based upon certain transaction criteria set forth in the settings.
- Creating a New Task Flow - Click the **New Task Flow** button on the **Settings > Task Flow** tab. The **Task Flow** settings screen will be presented accordingly.
- This screen is divided into six sections.
  - Identification
  - Copy an Existing Task Flow
  - Task Notification
  - Document Types
  - Transaction Identifiers
  - Approval Level Build



How to Create a New Task Flow

To create a new task flow, complete the following steps.

1. Click **Settings > Task Flow**.
2. Select the **New Task Flow** button.
3. The Task Flow web page for settings will be displayed, which is divided into six sections.
   - Identification
   - Copy an Existing Task Flow
   - Task Notification
   - Document Types
   - Transaction Identifiers
   - Approval Level Build



How to Create a New Task Flow, continued

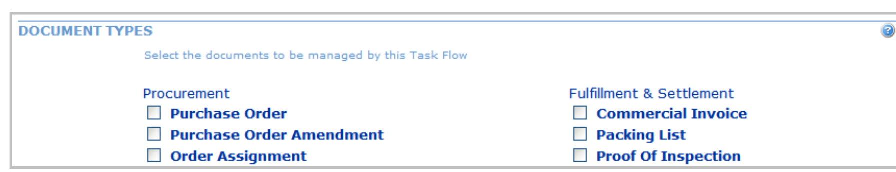
4. Fill out the necessary information in the following sections (continued).

- Section 1 – Identification
  The administrator names the task flow, assigns a task flow manager to **Full Name** via the **Look Up** table, and selects the **Approval** mode.

- Section 2 - Copy an Existing Task Flow
  Copy details from an existing task flow by clicking **Look Up**.

- Section 3 - Task Notification
  Specify E-mail notification for the task flow. There are 3 time levels for email notification: **Initial**, **Reminder** and **Overdue** notification.

- Section 4 - Document Types
  Select the documents to be managed by the task flow.



How to Create a New Task Flow, continued.

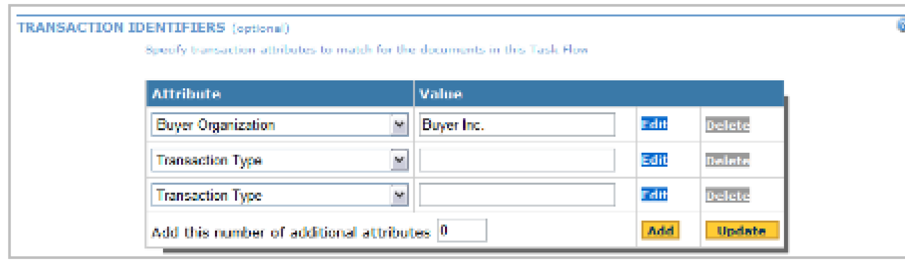
To create a new task flow, complete the following steps (continued).

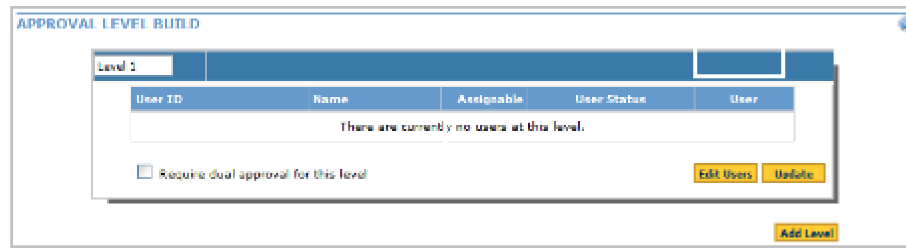
4. Fill out the necessary information in the following sections (continued).

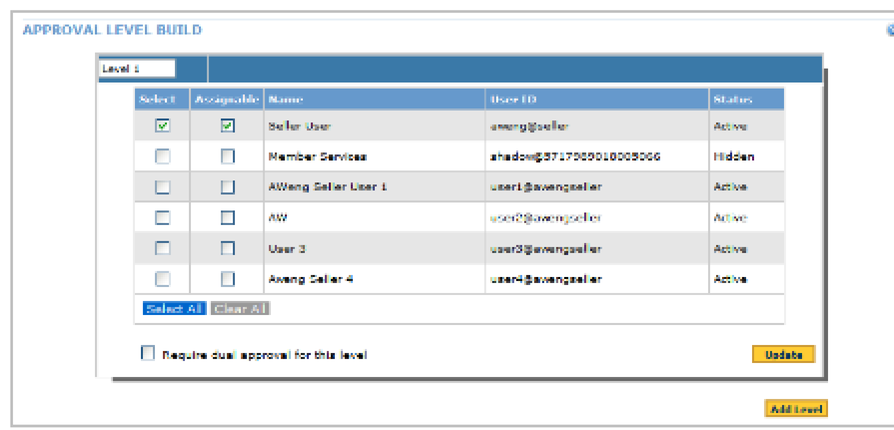
- Section 5 - Transaction Identifiers
  Specify transaction attributes to match for the documents in the task flow. Select **Attribute** from the drop-down list and then assign/enter the value by clicking the **Edit** button.
- Section 6 - Approval Level Build
  - Click **Edit Users** to add users;
  - Click the **Select** check box associated with any user that you wish to add to the approval level. And, select at least one assignable user by clicking on the associated **assignable** check-box.

  Note1: Users specified as **Selected** will not receive E-mail Task notifications but may still complete a task assigned to another peer within the level. Users specified as **Selected and Assignable** for this level will be assigned tasks and receive E-mail notifications.

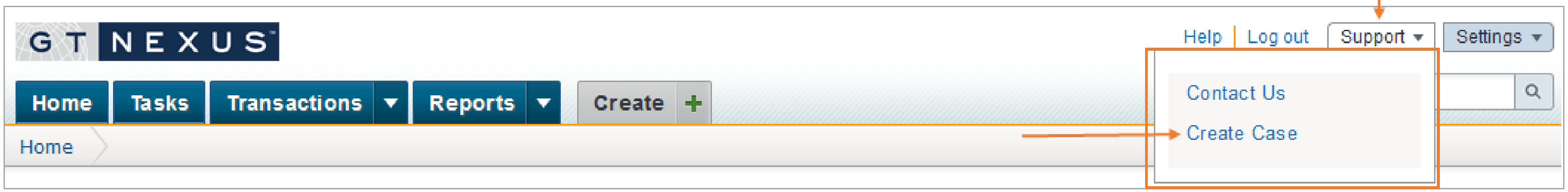
  Note2: For dual approval required, check off the box **Require dual approval for this level**. For more than one level approval task flow, click **Add Level** to add another level.
- After completing the task flow setup, click **Activate** to make the task flow active in the system.





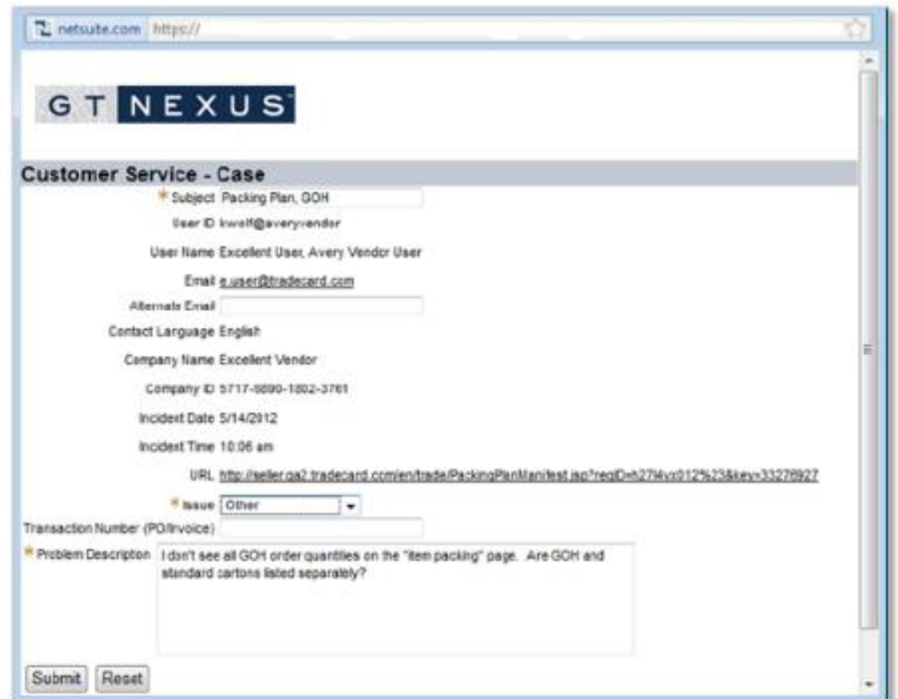


Contacting GT Nexus



Get Help Online – Create Case on GT Nexus

1. Click **Support**, select **Create Case**, the **Customer Service – Case** window displays.
2. The form will auto populate information about the **User** and the **Company Name**. Simply complete 3 additional fields on the web form prior to submitting the case and your queries will be taken care of:
   - **Subject**
   - **Issue**
   - **Problem Description**



How to Contact GT Nexus, continued

GT Nexus Customer Service Hotline

- GT Nexus provides experienced professional support personnel offering world-class service using standard relationship management technology with a single repository for customer support data. GT Nexus utilizes tools that encourage proactive problem prevention and resolution. GT Nexus' goal is to provide a superior service experience to members seeking assistance with GT Nexus.
- GT Nexus' 'Global Member Service Program' starts with the assignment of a 'GT Nexus Client Manager' to each new member. GT Nexus client managers work with each member from registration, through training and then on day-to-day support issues.
- Every new GT Nexus member, including vendors, are assigned a client manager based upon their geographic location and are further supported by the 'GT Nexus Customer Service Centers' located in the regions where GT Nexus operates.

GT Nexus Regional Centers:

Region	Telephone	Fax	Email
US	1-800-905-TRADE (8723)	1-646-349-1843	service@gtnexus.com
China	86-755-8830-9265	86-755-8830-9030	
Hong Kong	852-2111-4039	852-3015-7871	
Korea	82-2-503-5086	82-2-6670-2759	
Taiwan	886-2-2702-0685	886-2-6602-1012	
Vietnam	84-8-3520-2880	84-8-3520-2800	
Sri Lanka	94-112-408408	94-114-518676	

The End

Thank you