Buyer Administration Guide

MRO Software

Online Commerce Services

Release 3.1

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BUYER ADMINISTRATION GUIDE

OVERVIEW

This guide explains how to go through the setup tasks to enable electronic commerce (e-commerce) between your company and suppliers that use MRO Software Online Commerce Services to host their catalogs.

The *Buyer Administration Guide* contains basic information on using the Buyer Site Menu, which appears after you sign in as administrator. The Buyer Site Menu lists administrative tasks you perform to set up a buying company to enable e-commerce with a supplier site. You must complete several tasks in order to set up successfully to engage in e-commerce. Other tasks are optional. The order in which you do administrative tasks is important. For example, you should specify payment methods your buyers can use, and optionally the groups your buyers will belong to, before creating records for the buyers themselves.

You should read through the entire guide to understand the setup process before you use the Buyer Site Menu to perform setup tasks.

Outline of Setup Tasks

The following list provides one logical approach to the administrative tasks involved in setting up your company for e-commerce transactions with supplier companies. Subsequent sections contain additional information on each of the steps.

1. Sign in to the site with the user name and password that were provided to you, or the name and password you created when you registered.
2. Check and, if necessary, edit your company's detail information.
3. Enter the shipping address(es) your company's buyers can use.
4. Specify the payment methods your buyers can use.
5. (Optional.) Enter records for three types of buyer groups:
   - user groups (which specify buying limits)
   - catalog groups (for catalog restriction)
   - permission groups (for adding or editing payment methods and shipping addresses at checkout time).

   Each buyer at your company can belong to only one of each type of group.
6. Enter records for buyers—the people at your company who will purchase from the supplier site.
7. (Optional, at multi-vendor sites.) Request a buying relationship with one or more of the suppliers at the multi-vendor site.
8. Set the default company account number.
9. Enable shipping methods for each supplier.
10. (Optional.) Create records for contacts at your company.
11. (Optional, for MAXIMO® users.) Download one or more catalogs in XML format from suppliers so that you can load the catalog information into your MAXIMO database. (This requires that the supplier(s) have assigned catalogs to you.)

A Minimum of Required Setup Tasks

As you can see from the outline of setup tasks, many of the steps are optional. The site gives you great flexibility in how you set up your company to buy. But there are only a few things you must do to get up and running so that your users can shop and order items from the site. If your company does not have a large number of buyers, you might want to do no more than the minimum to establish an online buying relationship with suppliers:

1. Register and secure approval to buy from a supplier or suppliers.
2. Create a shipping address record or records for your company.
3. Create one or more payment methods your buyers can use.
4. Create user records.
5. Set the default company account number.
6. Enable shipping methods your buyers can choose.

After you complete these few steps, your users can sign in and begin shopping.

SIGN IN AS BUYER ADMINISTRATOR

To fulfill any buyer administration tasks, you must sign in as the administrator. The site might provide you with your initial user name and password, or you create them when you register.

After you sign in to the site with your administrator user name and password, the Buyer Site Menu appears. This menu provides access to the pages you use to set up and administer your company for e-commerce.

VIEW DOCUMENTATION

After you sign in as administrator, the Buyer Site Menu appears on the left of the page, with site information on the right.

The *Buyer Administration Guide* (this document) is listed under Information and Documentation.

This document is available to you in PDF (portable document file) format. The document has an associated link that you can click to display it in Acrobat® Reader®. (The page contains a link that you can use to download a free copy of Acrobat Reader if you do not already have it installed.) You can view the *Buyer Administration Guide* via Acrobat Reader, and print it if you want.

EDIT COMPANY INFORMATION

The Buyer Site Menu items provide access to the pages you use to complete initial setup and to maintain your account after you are set up for corporate buying. The first menu item beneath Site Information is Company. Click on this to display your company information.

Your company information was initially entered for you, or you provided it when you registered. You can click Edit to revise or add to this information. For example, you could change your account administrator user name. You should change your password if you did not create it yourself.

On the Company Information page, as on other pages available from the Buyer Site Menu, required fields have an asterisk (*).

Clicking Edit redisplays the Company Details page in edit mode. Some fields have drop-down lists of choices available for the field.

The country in the Country Code field determines the default date format in the Date Format field. You can change the default date format if you want. Click

Edit, then choose a new format from the Date Format field drop-down list. The country also determines the currency symbol in the read-only Currency Format field.

Use the Buying Application field to specify your purchasing application. Use the default, This Site, if your buyers will be going to the web site directly. You can also specify MAXIMO if your users shop via MAXIMO, or you can specify another buying application, such as Ariba®.

SPECIFY SHIPPING ADDRESSES

You must create one or more shipping addresses for your company so that buyers can specify a ship-to address when they place an order. You can create multiple shipping addresses, each with its own description. The shipping description is what appears as a choice in the Shipping Address drop-down field for buyers at order time.

To specify the shipping address(es) that will be used by your company's buyers, complete the following steps:

1. On the **Buyer Site Menu**, click **Shipping Addresses**.
2. On the **Shipping Addresses** tab, click **Add** to create a new shipping address.
3. Provide a name or description for the address in the **Shipping Description** field, for example, "Home Office" or "Southeastern Branch Office."
4. In the **Name** field, you can enter more specific destination information for the address named in the **Shipping Description** field, for example, "Loading Dock."
5. Specify other shipping address information. All required fields are marked with an asterisk (*).

6. Specify additional contact information (e-mail, fax), or leave it blank for the individual buyer to fill in at order time.
7. You can check **Make This My Default Shipping Address** to use this address as the default shipping address for all buyers at your company.
8. Click **Save** to save the address to the Shipping Addresses list.
9. Create additional addresses as needed.

You can modify addresses later by clicking Shipping Addresses, then clicking the shipping description and clicking Edit. This displays the address in edit mode. You can also click the Edit button to the right of the address.

Click the Delete button to delete an address from the Shipping Addresses list.

The Default Shipping Address

As noted in step 7 above, you can click Make This My Default Shipping Address to make an address the default ship-to address for your company. When you set a default shipping address, it becomes the default for all your company's buyers.

As administrator, you can override the company default for an individual user and specify a different default shipping address for him or her. Individual users can also change their default shipping address. See Specifying the Default Shipping Address, page 21.

SPECIFY PAYMENT METHODS

Click Payment Methods on the Buyer Site Menu in order to specify the payment methods your company supports. The methods you set up will become the list of payment methods available to assign to your buyers.

You can create two types of payment methods:

- credit cards
- purchase orders.

Adding a Credit Card

To add a credit card as a payment method, complete the following steps:

1. On the **Buyer Site Menu**, click **Payment Methods**.
2. On the **Payment Methods** tab, click **Add Credit Card**.
3. In the **Card Description** field, provide a card name or description, for example, "Corporate Card." Do not use punctuation marks, such as the apostrophe (') or caret (^). For authorized buyers, this description will appear as a payment type choice at checkout time.
4. Choose the card type from the **Payment Type** drop-down list. Card types in the Payment Type list are the cards the supplier accepts.
5. In the **Card Number** field, enter the credit card number. Do not use any hyphens (-) or other punctuation marks.
6. In the **Expiration Date** fields, use the drop-down lists to specify the card's expiration month and year.
7. Provide information in other fields; fields marked with an asterisk (*) are required.
8. You can check the **Make This My Default Payment Information** check box to specify this card as the default payment method for your buyers. (It will appear as the default only for orders from suppliers that accept that payment method.)
9. Click **Save** to save the credit card payment method.

You can modify credit card information by clicking Payment Methods, then clicking on the payment method and clicking the Edit button. This displays the payment method in edit mode. You can also click the Edit button to the right of the payment method in the Payment Methods list.

Adding a Purchase Order

To add a purchase order as a payment method, complete the following steps:

1. On the **Buyer Site Menu**, click **Payment Methods**.
2. On the **Payment Methods** tab, click **Add Purchase Order**.
3. In the **PO Description** field, provide a name or description for the PO; this is what will appear as a payment choice for the buyer. Do not use punctuation marks, such as the apostrophe (’) or caret (^).
4. Choose the supplier the PO is for from the **Supplier** drop-down list.
5. Choose a type from the **Payment Type** drop-down list. (The Payment Type list contains PO types that the supplier supports, such as individual PO or blanket PO.)
6. If you choose Blanket PO as the payment type, you must enter a PO number in the **PO/Ref #** field.
7. Provide information in other fields; required fields are marked with an asterisk (*).
8. You can check the **Make This My Default Payment Information** check box to specify this as the default payment type for your buyers.
9. Click **Save** to save the purchase order payment method.

You can modify purchase order information by clicking Payment Methods, then clicking on the payment method and clicking Edit. This displays the payment method in edit mode. You can also click the Edit button to the right of the payment method in the Payment Methods list.

CREATE BUYER GROUPS

You can create three kinds of groups to specify purchasing information for your buyers.

- "User groups" specify purchasing limits (e.g., $1000 or $5000) for users; these groups can be organized into a hierarchy for order approval.
- "Catalog groups" specify which catalog(s) are available to users for shopping. By default, all users can shop from all catalogs of a supplier. You should create catalog groups only if you want to limit access to some suppliers' catalogs to select groups of users.
- "Permission groups" specify whether users can add and/or modify payment methods and/or shipping addresses at checkout time.

If you want to use any of these optional types of groups, you should create the groups prior to creating records for your buyers; when you create buyer records, you specify the groups to which each buyer belongs. ("None" is the default for all group types when you create new user records.)

Creating User Groups

You might want to set up user groups for using an approval process for orders. You can establish a hierarchy of user groups and spending limits that models the spending authorization limits in your organization. The software routes over-the-limit orders to the appropriate supervisor, based on the user group purchasing limits and the entry in the Supervisor field on user records.

✓ **Example**

You create a Staff user group with a purchasing limit of $1000. You create a Supervisors user group with a purchasing limit of $5000. You create an Operations Manager user group with a purchasing limit of $20,000.

On user records for members of the Staff group, you specify a member of the Supervisors group in the Supervisor field. On user records for members of the Supervisors group, you specify a member of the Operations Manager group in the Supervisor field.

If someone from the Staff group submits an order for over $1000, the order is routed for approval to his or her supervisor. If that order, or an order the supervisor submits, is over $5000, the order is routed on to the Operations Manager for approval.

Orders needing approval are routed to the appropriate supervisor's Inbox. An e-mail message is also sent to notify the supervisor that an order needing approval has been routed to him or her. See the online help for information on using the Inbox.

If the buying limit for the company is higher than the buying limit of the top element of the user group hierarchy you have set up (Operations Manager in the example), any order exceeding the top user group's limit is routed to the buyer administrator.

If you do not set up user groups, all buyers from your company can make purchases up to the company buying limit.

To add a user group, complete the following steps:

1. On the **Buyer Site Menu**, click **Groups**.
2. On the **User Groups** tab, click **Add**.
3. On the **Group Details** page, specify a name for the group in the **Group Description** field, e.g., "Staff," "1000Limit," or "1000." Do not use punctuation marks, such as the apostrophe (') or caret (^).

4. In the Buying Limit field, enter the upper buying limit for this group, e.g., “1000.” Do not use a currency symbol, such as $, ₤, or ₣.
5. Click **Save** to save the user group information. This also creates a user group ID number.
6. Click **Add** to add more user groups.

Creating Catalog Groups

You need to create catalog groups only if you want to restrict some buyers from shopping from one or more of the supplier’s catalogs.

✓ **Example** A supplier provides three catalogs, Lighting, Electronics, and Automotive. You want to provide your electricians access only to the Lighting and Electronics catalogs, and reserve access to the Automotive catalog for members of your automotive maintenance staff.

To add a catalog group, complete the following steps:

1. On the **Buyer Site Menu**, click **Groups**.
2. Click **Search for Catalog Groups**.
3. On the **Catalog Groups** tab, click **Add**.
4. On the **Catalog Group Details** page, specify a name or description for the group in the **Group Description** field; e.g., “Electricians.” Do not use punctuation marks, such as the apostrophe (’) or caret (^).
5. Click **Save** to save the catalog group information. This also creates a catalog group ID number.
6. Click **Add** to add more catalog groups.

Restricting Catalogs from Groups

After you create the catalog groups for any users you want to restrict from shopping from one or more of the available catalogs assigned by the supplier, you can make catalog restrictions. You restrict catalogs one group at a time.

To restrict users from using one or more of a supplier's catalogs, complete the following steps:

1. On the **Buyer Site Menu**, click **Groups**.
2. Click **Search for Catalog Groups**.
3. On the **Catalog Groups** page, click the link of the group you want to restrict catalogs from. This displays the catalog group and the Restrict Catalogs by Group menu item.
4. Click **Restrict Catalogs by Group**.
5. On the **Catalog Management** page, select the supplier, if you are setting up for a multi-supplier site.

   The Catalog Management page initially displays all the supplier's catalogs in the Approved Catalogs list.
6. Click the **check box** next to any catalog you wish to restrict from the catalog group.
7. Click the **right arrow**  to move the selected catalog(s) to the Restricted Catalogs list.

To make catalog restrictions for other catalog groups, click Search for Catalog Groups.

Creating Permission Groups

You might want to set up permission groups in order to limit some users' abilities to add and/or modify shipping addresses and/or payment types. All users not specifically placed in a permission group that limits them can, at checkout time, add or modify shipping address information, and can add or modify payment method information.

1. On the **Buyer Site Menu**, click **Groups**.
2. Click **Search for Permission Groups**.
3. On the **Permission Groups** tab, click **Add**.
4. On the **Permission Group Details** page, provide a group name or description in the **Group Description** field. Do not use punctuation marks, such as the apostrophe (') or caret (^).

   All permissions are initially checked, since the default for all users is to be able to add or edit shipping information and payment information at checkout time.
5. Click on the associated check box to uncheck any of the permissions you want to deny to members of this group. (Members of the group will have permission to do only those things that still have a check mark.)
6. Click **Save** to save the permission group information. This also creates a permission group ID number.
7. Click **Add** to add more permission groups.

CREATE USERS

After you specify the shipping addresses and payment methods buyers can use, and create any groups you might want to add buyers to, you are ready to create the records for individual buyers at your company. (You can create other administrator users too, by choosing Corporate Administrator in the Role field when adding the user.)

To add a user, complete the following steps:

1. On the **Buyer Site Menu**, click **Users**.
2. On the **Users** tab, click **Add**.
3. Enter the user name and password and user's first and last names.
4. Choose the user's role from the **Role** field drop-down list. Choose **B2B Buyer** to create a user who will sign in to the site to order items. You can also choose **Corporate Administrator** to create a user who will share your administration rights—that is, another user who will have access to and use of the Buyer Site Menu.
5. If applicable, specify a permission group for the user. The **Permission Group** drop-down list includes any permission groups you have created. The default is None, meaning the user has permission to add and edit shipping addresses and payment methods.
6. If applicable, specify a catalog group for the user. The **Catalog Group** drop-down list includes any catalog groups you have created. The default is None, meaning the user can shop from all the supplier's catalogs.
7. If applicable, specify a user group for the user. The **User Group** drop-down list includes any user groups you have created. The default is None, meaning the user's buying limit is the same as the buying limit for your company.
8. In the **Supervisor** field, enter the user's supervisor. This is important if you are using a hierarchy of user-group spending limits to route over-the-limit orders to supervisors for approval.
9. Enter other user information. All required fields are marked with an asterisk (*).

10. Click **Save** to save the user record.

Before users can shop online at our site, you must assign them one or more payment methods that they can use to buy goods.

Any newly created user initially “inherits” the default shipping address and default account number you specify for your company. You can assign an individual user a different default shipping addresses, if you want. You can also assign users a default account number different from the company default, if the supplier has provided you with multiple account numbers to use.

Assigning Payment Methods

Payment methods are supplier-specific. One supplier might accept only Visa credit card orders, another might accept only one-time POs, and a third might accept two types of credit card as well as a standing or blanket PO. You need to assign the payment methods your buyers can use. If your company is set up to shop from multiple suppliers, you need to assign one or more payment methods for each supplier, for each user.

To assign a payment method to a user, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Users**.
3. Click on the name of the user you want to assign payment methods to.
4. On the Buyer Site Menu, click **Assign Payment Methods**.
5. If your company is set up at the site to shop from multiple suppliers, select a supplier in the **Supplier Name** field. The list on the left is the list of payment methods the selected supplier accepts.
6. Click the check box to the left of each payment method you want to make available to the user.

7. Click the **right arrow** to move the selected payment methods to the user's Payment Methods list on the right.

8. Repeat steps 5 through 7 for each supplier.

Setting a Default Payment Method

It is possible, but not necessary, to specify a default payment method for each user, for each supplier.

If you assign a payment method that you designated as the company-wide default, that payment method will appear as the default selection for that supplier, for that user. You can override this default, and/or set a default payment method for other suppliers.

To set a default payment method, complete the following steps:

1. On the **Buyer Site Menu**, click **Users**.

2. In the **Users** list, click on the **name of the user** you want to assign a default payment method to.

3. On the Buyer Site Menu, click **Set Default Payment Method**.

4. If your company is set up to shop from multiple suppliers at the site, select a supplier in the **Supplier Name** field.

5. In the Payment Methods list, click **User Default** for the payment method you want to appear as the default choice for the user for the selected supplier.

6. Repeat steps 4 and 5 for each supplier you want to set a default payment method for.

An individual user can also set his or her own default payment method for a supplier. This would override any default set by you, the administrator. If a user sets his or her own default payment method for a supplier, the Payment Methods list indicates the user default. Setting a default payment method as an end user is covered in the online help

Assigning a Default Account Number

The account number or numbers your company uses to shop online are established and made available to you by the supplier or suppliers you shop from. The available account number or numbers for a supplier can be viewed on the Suppliers pages. You can also see them by selecting a user name from the Users list, then clicking Set Default Account Number.

If your company uses only a single account number with a supplier, there is no need to set a default. If a supplier has provided you with multiple account numbers, you should set a company-wide default. You should do this prior to setting any individual default account numbers. (See Setting the Company Default Account Number, page 25.)

If a supplier has provided multiple account numbers to you (for multiple branches, for example), you can set a default account number for a user that is different than the company default. If you are set up to shop from multiple suppliers, you could theoretically specify an individual default account number for each user, for each supplier that supports multiple account numbers. In practice, you will probably not want to specify many individual account number defaults. The company-wide default should usually serve for most of your buyers.

An individual user can also set his or her own default account number for a supplier. This would override the company default or any other default set by you, the administrator. If a user sets his or her own default account number for a supplier, the Account Numbers list indicates the user default. Setting a default account number as an end user is covered in the online help

To set the default account number for a user, complete the following steps:

1. On the **Buyer Site Menu**, click **Users**.

2. In the **Users** list, click on the **name of the user** you want to assign a default account number to.
3. On the Buyer Site Menu, click **Set Default Account Number**.
4. If your company is set up to shop from multiple suppliers at the site, select a supplier in the **Supplier Name** field.
5. In the **Account Numbers** list, click **User Default** for the account number you want to set as the default for that user.
6. Click **Submit**.
7. If you are set up to shop from more than one supplier, repeat steps 4 through 6 for any other supplier you want to set a different default for, for the selected user.

Specifying a Default Shipping Address

When you created shipping addresses, you should have checked Make This My Default Shipping Address for one of the addresses. This makes it the default for all your company's users. (If you created only one shipping address, that is automatically used as the default for all users.)

You can specify a different default shipping addresses for an individual user.

To change the default shipping address for someone, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Users**.
3. Click on the **name of the user** whose default shipping address you want to change.
4. Under **Users** in the Buyer Site Menu, click **Set Default Shipping Address**.

5. In the **Shipping Addresses** list, click the **User Default** button for the address you want to set as the default for that user.

6. Click **Submit**.

An individual user can also set his or her own default shipping address, overriding the default set by you, the administrator. If a user sets his own default (and makes it the permanent default, rather than the default for the current session only) that is reflected on the Shipping Addresses list in the Users pages for that user—the User Default button is selected for the user's default address, just as if you had set it yourself. Setting one's own default shipping address as an end user is covered in the online help.

ESTABLISH AND MANAGE SUPPLIER RELATIONSHIPS

If you are signed in to a multi-vendor site such as MRO Software Operations Center, the Suppliers menu item provides access to pages you use to request buying relationships with suppliers. You also use the Suppliers menu item to manage your relationship with each supplier you do business with, whether you are signed into a multi-vendor site or a single-vendor site.

Requesting a Buying Relationship with a Supplier

If you are signed in to a multi-vendor site, there are two ways you can request an online customer relationship with a supplier.

- Request access to a supplier in the Participating Suppliers list.
- If the supplier you want to set up e-commerce with is not listed, invite the supplier to participate in the online commerce site.

Requesting Access to a Supplier

To request a buying relationship with a participating supplier at a multi-vendor site, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Suppliers**.
3. You can enter the supplier's name in the **Search for Suppliers** area, and click **Find**. Or locate the supplier in the **Participating Suppliers** list.
4. If you already know you want a buying relationship with the buyer, check the **Request Access** check box, then click **Submit**. Go to step 7.
5. If you want to know more about the supplier, click the **supplier name** to display the supplier's **Profile** page. The Profile page contains information about the supplier that should help you determine if the supplier is an appropriate one for your company. For example, the supplier profile page might include the following information:

   - industries and businesses served
   - product lines available
   - geographic regions served.

   There is also contact information for the supplier.
6. Click **Request Relationship** if you want to establish a buying relationship with the supplier.
7. On the **Relationship Request** page, click **I Agree** in response to the agreement statement.
8. On the **Request Confirmation** page, you see supplier contact information. You might want to print this page for reference.
9. Click **Continue** to return to the Participating Suppliers page.

You will be notified by e-mail of your acceptance or rejection by the supplier.

Inviting a Supplier

If you are signed into a multi-vendor site and do not see the supplier you want in the Participating Suppliers list, you can invite the supplier to establish a relationship at the site.

To invite a supplier to establish a relationship, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Suppliers**.
3. Beneath the Search for Suppliers area, click **Invite a Supplier**.
4. On the **Relationship Request** page, click **I Agree** in response to the agreement statement.
5. On the **Supplier Invitation** page, fill in the **Company Name** and **Supplier's E-mail** fields.
6. Click **Send Request**. Or, to invite another supplier too, click **Send This Invitation and Invite an Additional Supplier**.

   An e-mail notification will be sent to the supplier informing it of your invitation. We suggest you also contact the supplier representatives yourself to let them know you have invited them to join our site.
7. Click **Continue** to return to the Participating Suppliers page.

Managing Your Relationships with Suppliers

The Suppliers menu item also gives you access to pages you use to manage important aspects of your relationships with suppliers.

In the **Participating Suppliers** list, click on a **supplier name** to view company information. This also makes some additional menu items available under Suppliers in the Buyer Site Menu.

Click **Search for Contacts** to view a list of company contacts the supplier might have created. You can click on a **contact name** to display contact information for that person.

Setting the Company Default Account Number

Click **Search for Account Numbers** to display the list of account numbers the supplier has provided for your company. If a supplier has made multiple account numbers available to you, you should specify one of those as the company-wide default.

To set the company-wide default account number for a supplier, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Suppliers**.
3. You can enter the supplier's name in the **Search for Suppliers** area, and click **Find**. Or locate the supplier in the **Participating Suppliers** list.
4. Click the **name of the supplier** you want to set the company default account number for.
5. On the **Buyer Site Menu**, under Suppliers, click **Search for Account Numbers**.
6. In the **Account Numbers** list, click **Company Default** for the account number you want used as the default for your company's buyers.
7. Click **Submit**.

The specified account number will be the account number automatically used by your company's buyers, unless you, or the individual buyer, sets a different default account number for that person. (See Assigning a Default Account Number, page 21.)

Enabling Shipping Methods

The supplier or suppliers at the site specify the kinds of shipping methods they use; this list is available to you under the Suppliers menu item after you select a supplier. You use the Shipping Method Management page to specify which of the supplier's supported shipping methods you want available to your buyers. You enable shipping methods on a supplier-by-supplier basis.

NOTE: *You must enable at least one shipping method for each supplier in order for users to have a shipping method choice available to them. Without a shipping method, orders cannot be processed.*

To enable shipping methods for your company's buyers, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Suppliers**.
3. In the **Participating Suppliers** list, click the **name of the supplier** you want to enable shipping methods for.
4. On the **Buyer Site Menu**, under Suppliers, click **Enable Shipping Methods**. This displays the **Shipping Method Management** page.

   On the Shipping Method Management page, you can see all the shipping methods the supplier supports. Until you enable one or more shipping methods, they all are listed in the Disabled Shipping Methods list at the left.
5. In the **Disabled Shipping Methods** list, click the **check box** to the left of each shipping method you want available as a choice to your buyers.

6. Click the **right arrow**  to move the selected shipping methods to the **Enabled Shipping Methods** list on the right.

7. If you are signed in to a multi-vendor site, repeat steps 3 through 6 for each supplier.

The enabled shipping methods will now appear as choices in the Shipping Method drop-down list available on the shopping cart and checkout pages.

You can return to the Shipping Method Management page at any time to move shipping methods from the Disabled list to the Enabled list, or vice versa.

Viewing Supplier Contacts

Suppliers might have created records for contacts at their companies—people you can telephone or e-mail with questions about parts or orders. You can easily check a supplier's contact information.

To view a supplier's contacts, complete the following steps:

1. Sign in as buyer administrator.

2. On the **Buyer Site Menu**, click **Suppliers**.

3. In the **Participating Suppliers** list, click the **name of the supplier** whose contacts you want to view.

4. On the **Buyer Site Menu**, under Suppliers, click **Search for Contacts**.

   This displays the **Contacts** page. On the Contacts page you can see the names of people the supplier company has identified as company contacts. (In order for contact names to be listed here, the supplier administrator must have entered records for the contacts).

5. Click on a contact name to display the Contact Details page.

Here you can view contact information for the selected contact person—name and address, telephone number, FAX number, and e-mail address, for example.

Creating Your Own Company Contacts

Just as it can be useful for you to be able to see a list of contact people created by the supplier, the supplier can find it helpful to be able to see a list of contact people created by your company. You can create records for your own company contacts so that they will be available for suppliers to view online.

To create a record for a contact person at your own company, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Contacts**.

   Any existing contacts created by you or another buyer administrator at your company would appear in the Contacts list.
3. On the **Contacts** page, click **Add**.
4. On the Contact Details page, fill in the fields with contact information. Fields marked with an asterisk (*) are required.
5. Click **Save**.
6. Repeat steps 3 through 5 to create additional contact records.

DOWNLOAD CATALOGS

The Download menu item displays the Catalog Download page. This page lets you select catalogs for download in XML (extensible markup language) format. This feature is intended for use mainly by sites that use MAXIMO. After a catalog is downloaded, you can use MAXIMO's Catalog Loader feature to load the XML file of catalog items into the MAXIMO database. This makes the catalog items, with current price and availability information, available to users of MAXIMO. MAXIMO users will then be able to purchase the items as they normally do from within MAXIMO, using the latest contract prices.

To download a supplier's catalog from the site, complete the following steps:

1. Sign in as buyer administrator.
2. On the **Buyer Site Menu**, click **Download**.
3. On the **Catalog Download** page, use the **Supplier Name** drop-down list to select the supplier whose catalog(s) you want to download. (You do not see the Supplier Name field if you are at a single-supplier site.)
4. In the **Select Catalogs for Download** list, check the catalog or catalogs you want to download. After a catalog is checked, the Create Download File button appears.
5. Click **Create Download File**. This triggers a price and availability check then creates an XML file, so the file contains the latest supplier price and availability information for your company.
6. After the file creation is complete and the page is refreshed, the file name appears in the Files Ready for Download list. Click **Refresh Download List** to refresh the page, if necessary.
7. Double-click on the **file name** in the **Files Ready for Download** list. This displays the standard File Download window.
8. On the **Save As** window, specify the file location you want to download the file to.

After the file is downloaded to your local environment, you can use MAXIMO's Catalog Loader feature to update your MAXIMO database with the catalog information.

THE INBOX MENU ITEM

The Inbox menu item is not used for buyer company setup. After you are up and running and your buyers are submitting orders, you use the Inbox to view and approve or deny orders that might have been routed to you for approval because a buyer's buying limit was exceeded on the order.

See Creating User Groups (page 13) for information on creating user groups with escalating buying limits; these are necessary for automatic routing of over-the-limit orders to a supervisor. See Using the Inbox in the online help for more information on using the Inbox to view and manage orders routed to you.

THE ORDER HISTORY TAB

Like the Inbox, the Order History tab is another feature that is not used for setup, but is valuable once your company is engaged in e-commerce with a supplier. You can click the Order History tab to check the status of orders you have submitted. See Order History in the online help for more information.