

## JAGGAER Adopt

## Standard Guides

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# Table of Contents

<b>Table of Contents</b> .....	<b>2</b>
<b>JAGGAER Adopt Standard Guides</b> .....	<b>3</b>
<b>JAGGAER Adopt Standard Guides</b> .....	<b>3</b>
Exporting, Saving, Filtering, and Pinning Search Results.....	3
eProcurement Guides .....	4
Additional Guides .....	5
Supplier Guides .....	6

# JAGGAER Adopt Standard Guides

## JAGGAER Adopt Standard Guides

JAGGAER Adopt provides interactive in-app guides and user behavior data to JAGGAER products. JAGGAER Adopt is off by default and must be enabled by JAGGAER.

Several JAGGAER Adopt interactive in-app guides are also available for suppliers. These guides are available to all suppliers.

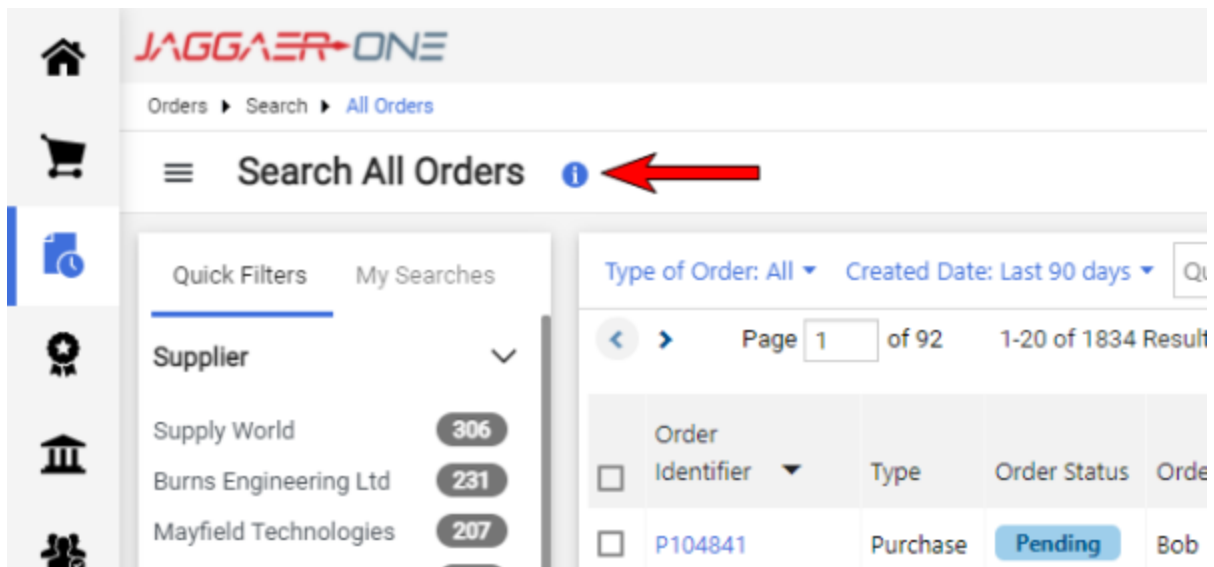
The following is a list of standard guides that are included with JAGGAER Adopt, which are available to customers that have JAGGER Adopt enabled.

## Exporting, Saving, Filtering, and Pinning Search Results

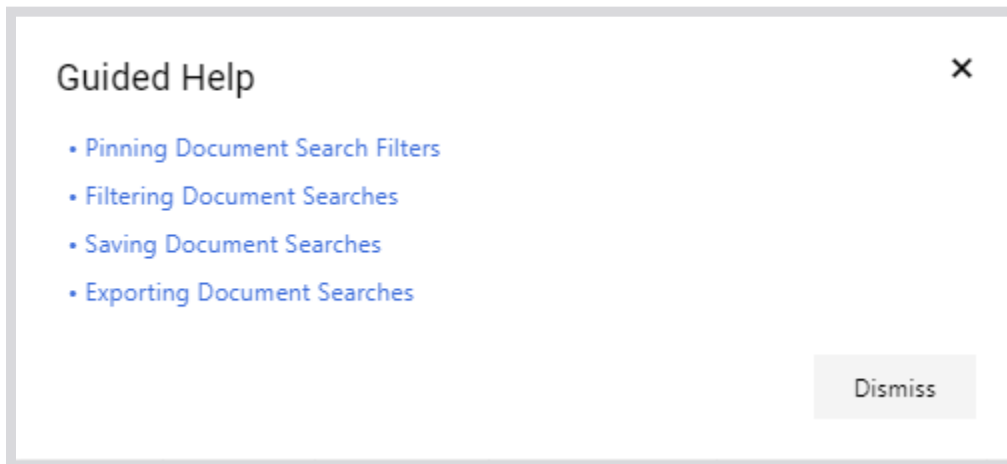
JAGGAER Adopt guided help for exporting, saving, filtering, and pinning search results is available on the following pages:

- **All Orders** - Navigate to Orders > Search > All Orders.
- **Requisition Orders** - Navigate to Orders > Search > Requisitions.
- **Purchase Orders** - Navigate to Orders > Search > Purchase Orders.
- **Change Requests** - Navigate to Orders > Search > Change Requests.
- **Procurement Requests** - Navigate to Orders > Search > Procurement Requests.
- **Invoices** - Navigate to Orders > Search > Invoices.
- **Receipts** - Navigate to Orders > Search > Receipts.
- **Sales Orders** - Navigate to Orders > Search > Sales Orders.
- **Sales Invoices** - Navigate to Orders > Search > Sales Invoices.

Click the  icon to open the guided help menu:



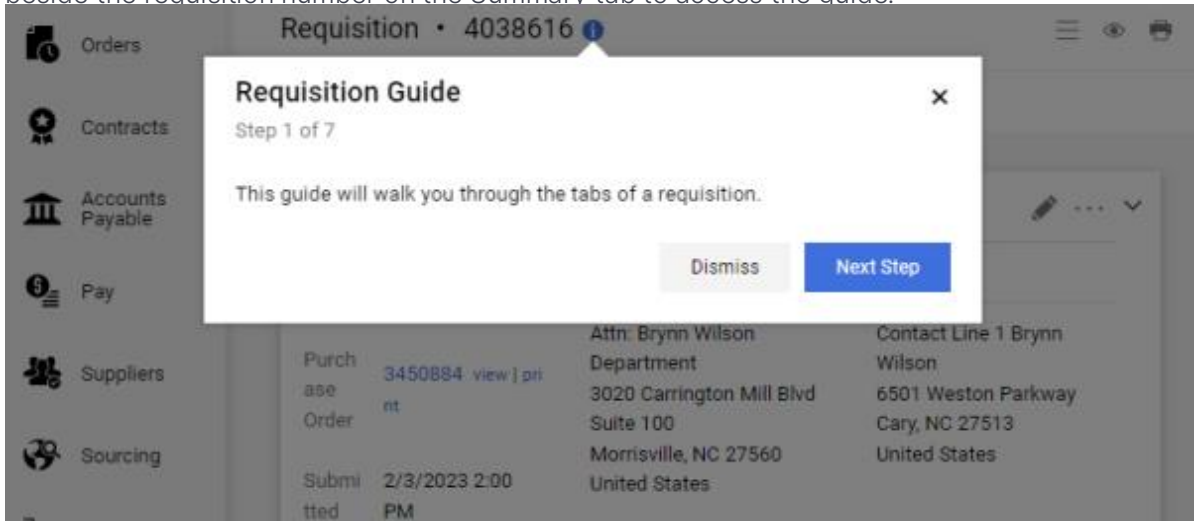
After clicking the **i** icon, select from the available options in the guided help menu:



## eProcurement Guides

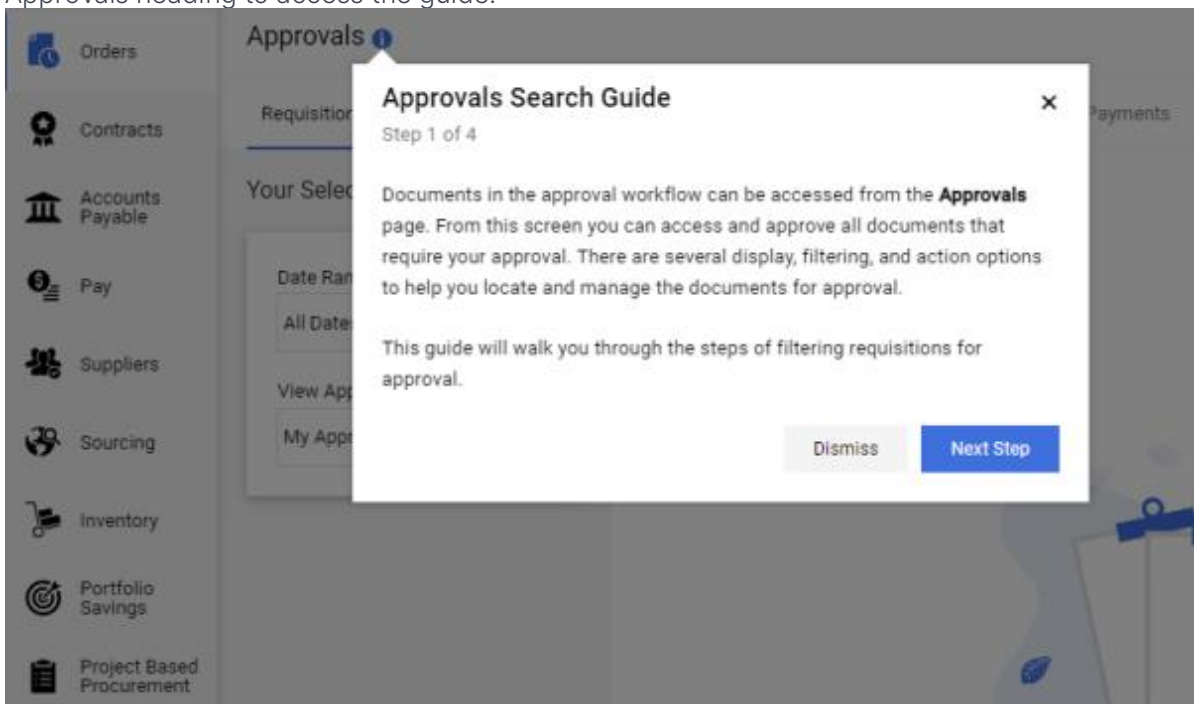
The Requisition Guide walks you through the tabs and basic functionality of a requisition.

- Navigate to **Orders** > **Search** > **Requisitions**, then open a requisition. Click the **i** icon beside the requisition number on the Summary tab to access the guide.



The Requisition Approvals Search Guide walks you through the steps of filtering requisitions for approval.

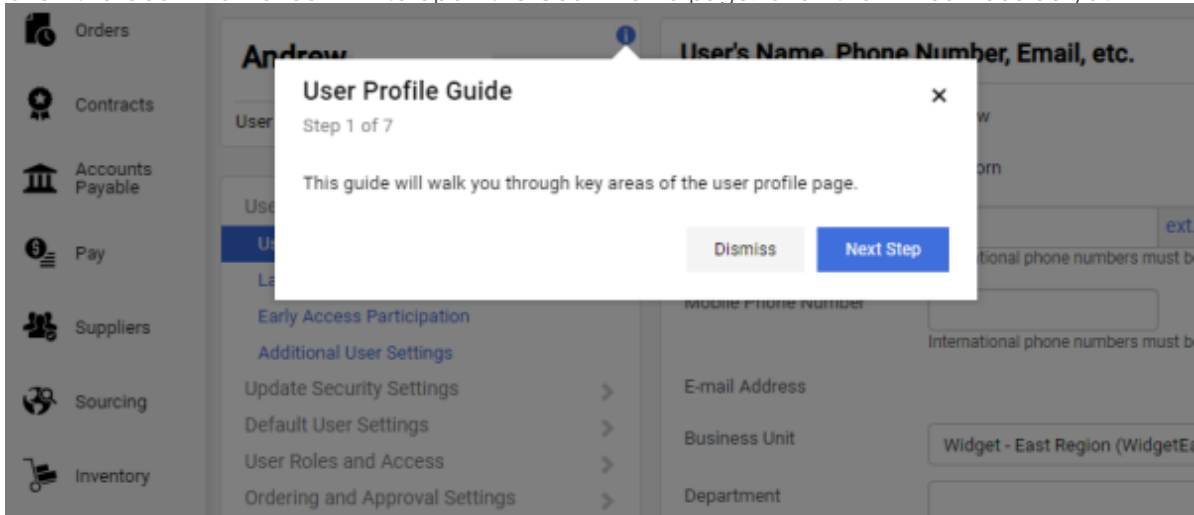
- Navigate to **Orders** > **Approvals** > **Requisitions to Approve**. Click the **i** icon beside the Approvals heading to access the guide.



## Additional Guides

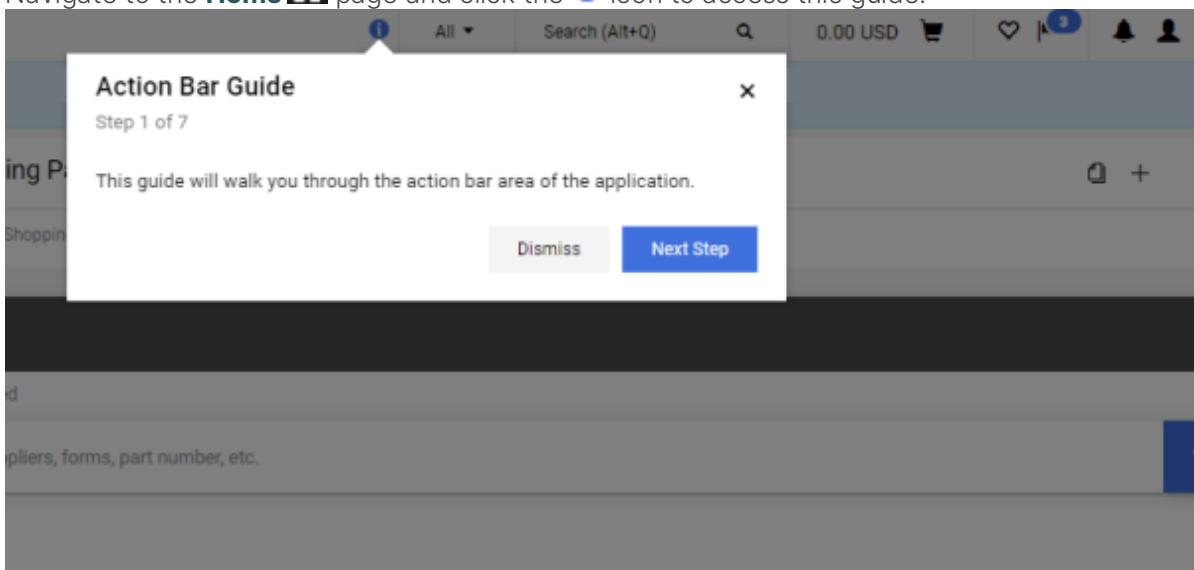
The User Profile Guide provides information on the key areas of the user profile.

- Click the **User Profile icon**  to open the User Profile page. Click the **i** icon beside your



The Action Bar Guide provides information on the functions of the Action Bar.

- Navigate to the **Home**  page and click the **i** icon to access this guide.



## Supplier Guides

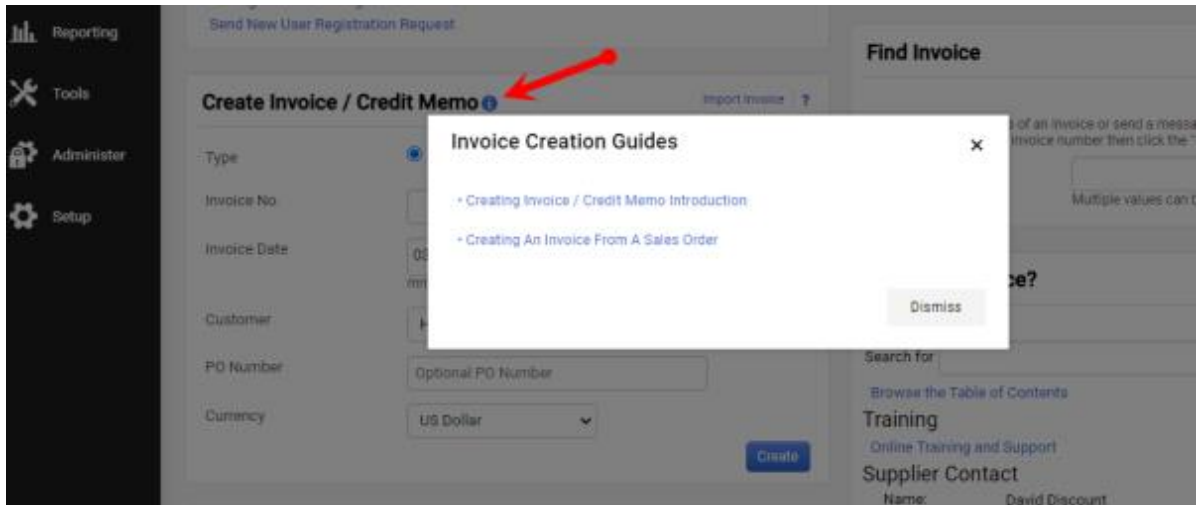
Several JAGGAER Adopt interactive in-app guides are also available for suppliers. These guides are available to all suppliers that have access to the Supplier Portal.

## Invoicing

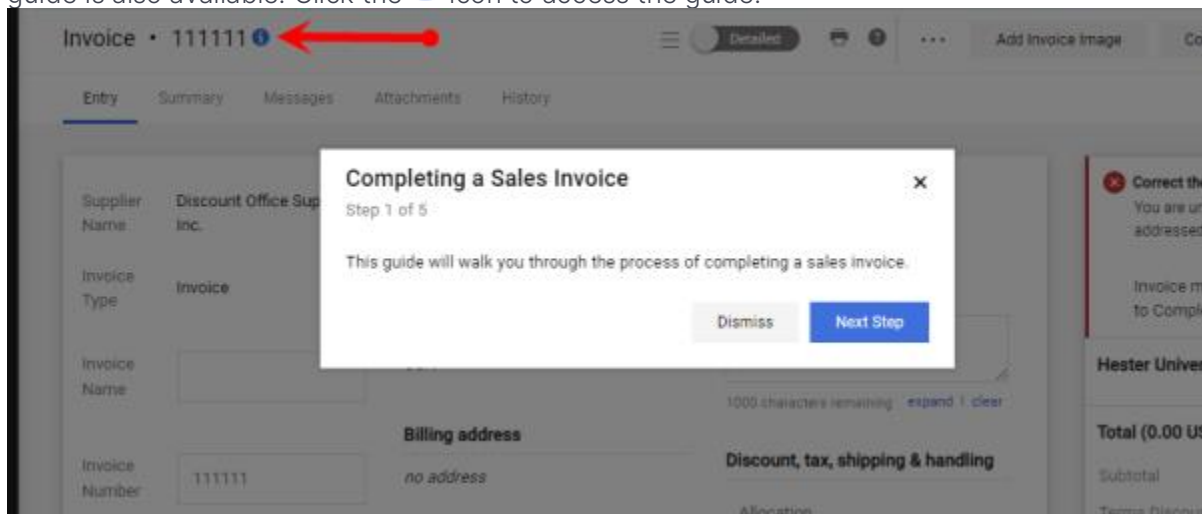
Invoice Creation guides are available on the Supplier Portal Home page. Click the **i** icon to access the following guides.

- Creating Invoice / Credit Memo Introduction** - This guide provides an introduction to creating an invoice.

- **Creating An Invoice From A Sales Order** - This guide walks you through the steps of




From the Advanced Manual Entry page for creating an invoice, the **Completing a Sales Invoice** guide is also available. Click the **i** icon to access the guide.



A Supplier Portal invoicing video guide is available on the Supplier Portal. The guide is accessed by navigating to **Orders > Supplier Invoices > Create Supplier Invoice**. Click the **i** icon to open the guided help video:

The screenshot shows a web interface for creating an invoice. On the left is a vertical sidebar with icons for home, refresh, chart, tools, lock, and settings. The main content area is titled "Create Invoice / Credit Memo" with a red arrow pointing to the text. To the right of the title is a link for "Import Invoice" with a question mark. Below the title are two radio buttons: "Invoice" (selected) and "Credit Memo". The form contains the following fields: "Invoice No." (text input), "Invoice Date" (calendar picker showing 06/22/2022 with a format hint "mm/dd/yyyy"), "Customer" (dropdown menu), "PO Number" (text input with "Optional PO Number" placeholder), and "Currency" (dropdown menu showing "US Dollar"). A blue "Create" button is located at the bottom right of the form.

The invoicing video guide is also available on the Invoice creation page, which can be accessed by navigating to **Orders > Supplier Invoices > Create Supplier Invoice** and creating a new invoice. The video appears on both the Simple and Detailed versions of the Invoice creation page. The guide appears automatically until the supplier clicks the **Dismiss** button, and can be accessed again by clicking the  icon on the page.



## Improved Invoicing Functionality ×

The JAGGAER 22.2 Release, made available on July 18th, includes several enhancements to improve the Invoicing functionality available in your JAGGAER Supplier Portal.

Detailed information about these enhancements is available in the Release Notes. You can view the release notes by [clicking here](#).

Additional information is available in your Supplier Portal Handbook and your Invoicing 101 guide, which are available from the Online Training and Support page of the Supplier Portal. You can access this page by navigating to Tools > Online Training and Support > View Online Training and Support.

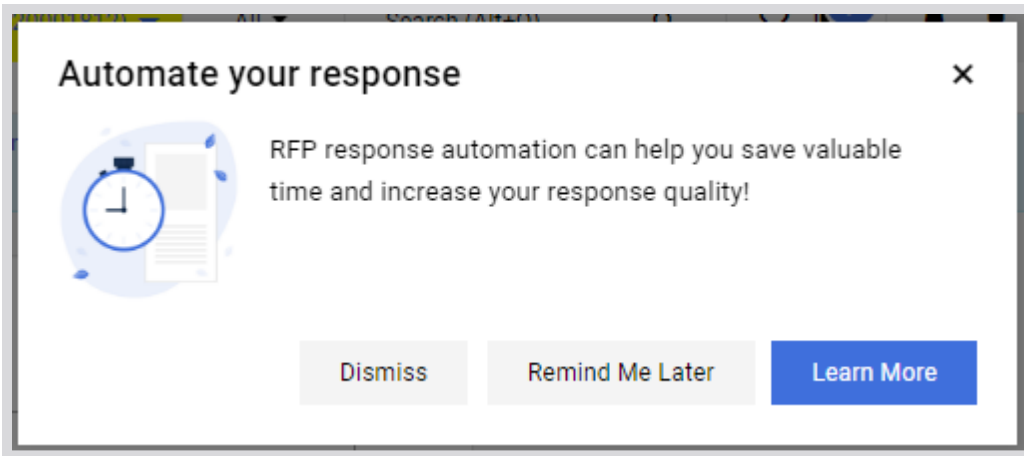


Dismiss

Remind Me Later

## Additional Supplier Guides

A guide providing information on RFP response automation is available to suppliers on the Supplier Portal. To access the guide, navigate to **Sourcing > Sourcing Events > Search Events**. The guide appears automatically until the supplier clicks the Dismiss button.



A guide providing information on submitting invoices is available to suppliers on the Supplier Portal. To access the guide, navigate to **Orders > Supplier Invoices > Create Supplier Invoice**. The guide appears automatically until the supplier clicks the **Dismiss** button.

