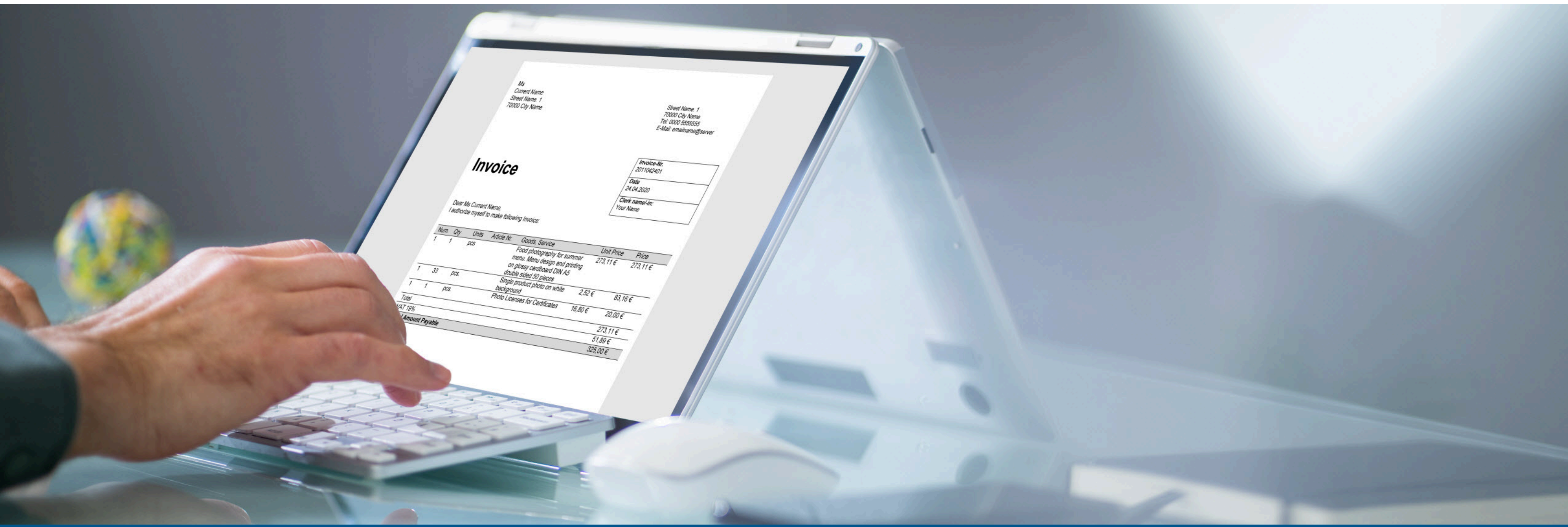


# Tungsten Network
## Supplier Connect Implementation Guide

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TUNGSTEN
NETWORK
BY TUNGSTEN AUTOMATION

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# Introduction

This document describes how onboarding Integrated Suppliers can use Supplier Connect, the self-serve implementation option, to connect to a buyer on Tungsten Network. The connection process consists of 10 steps.

Onboarding Integrated Suppliers connecting to a single buyer work through all 10 steps via the Supplier Connect portal; onboarding Integrated Suppliers connecting to multiple buyers use the Supplier Connect portal through the review requirements step, and then work with the Tungsten Network implementation team offline to upload test invoice files and complete the rest of the steps.


Step 1: Accept email invite

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You can log in and out of the Supplier Connect portal at any time during this process. You may need to invite other users from your organization to help complete the steps. Once a step is complete, it displays on the timeline as read-only and cannot be edited.

The Supplier Connect portal is available only during the initial implementation and testing process. Once your implementation is complete, your login redirects you to the Tungsten Network Portal to begin live transactions.

# Step 1: Accept email invite

When your implementation is ready to begin, you receive an email from Tungsten Network.

1. Click the **Accept Invitation** button in the email to log in to the Supplier Connect portal.
2. If this is the first time you are using the portal, do the following as prompted:
    a. Accept the Tungsten terms of use and privacy policy.
    b. Create a password.
    c. Set up Two-Factor Authentication (2FA) if you haven't done so already.

# Step 2: Verify company details

Company details are vital information that must be accurate to prevent delays or issues during your implementation.

1. Verify your full company details and update them if necessary. Required fields may differ per country.
2. When finished, click **Next Step**.

# Step 3: Confirm buyers

The buyers selected on this screen are the buyers to which you want to proceed with connection. All listed buyers are selected by default.

> Buyers deselected during this step are removed and cannot be added again during the implementation process.

1. Select the buyer entities to which you want to connect.
2. Confirm that details are correct for each selected buyer.

   If you don't recognize a listed buyer or any details are incorrect, deselect all buyers to display a warning that no customers are selected. Click the **contact us** link to request that Tungsten review the buyer information. While this request is being reviewed, you see an **Updating Buyers** status screen.
3. **Optional**: To add a customer number used to identify the buyer within your ERP system, click **Edit/Add buyer account number**.

   This unique identifier can include up to 40 characters. The AAA number on the TN tab is the Tungsten ID Number for the buyer and cannot be changed or deleted. The buyer's Tax ID number also cannot be changed or deleted.
4. When finished, click **Next Step**.

# Step 4: Review steps and timeline

The **Implementation Overview** screen lists the remaining steps and target dates, including the expected go-live date. Reviewing this timeline is important because the success of the implementation process and test cycle depends on the quality of information your company shares with Tungsten Network and the availability of your resources.

Suppliers connecting to multiple buyers see target dates for only the questionnaire and review requirements steps along with an estimated go-live date on this screen because the implementation steps beyond that point are handled offline with the Tungsten Network implementation team. Suppliers connecting to a single buyer continue their implementation on the Supplier Connect portal.

The target dates may vary based on the map type you are using. The following table explains how target dates are calculated.

| Step | Target Completion Date |
|---|---|
| Complete questionnaire | 5 days from logging into the Supplier Connect portal and accessing the onboarding screen |
| Review requirements | 5 days from submission of questionnaire |
| Upload test invoice files | 1 day from acknowledging test invoice file requirements (clicking Next Step on Review requirements step) |
| Review test invoice files | **Master Map Implementation**: 13-16 days from upload of test invoice files<br>• 2 days for Tungsten Network review<br>• 2 days for you to make any changes needed<br>• 3 days for Tungsten to create sample invoices<br>• 3 days for Tungsten to create mapping<br>• 3 days (6 days if buyer approval is required) to approve sample invoices<br>**Custom Map Implementation**: 20-23 days from upload of test invoice files<br>• 2 days for Tungsten Network review<br>• 2 days for you to make any changes needed<br>• 3 days for Tungsten to create sample invoices<br>• 10 days for Tungsten to create mapping<br>• 3 days (6 days if buyer approval is required) to approve sample invoices<br>To switch map type from Master to Custom or Custom to Master, see Change map type. |
| Start e-invoicing (when first live invoice is sent) | 2 days from approval of sample invoice files |

1. Review the remaining implementation steps and timeline. To view more information for any step on this screen, hover over the question mark icon.
2. **Optional**: To edit a target date, click the date to launch the **Change Dates** window. Be sure to enter the reason for a date change. When finished making changes, click **Save**.

3. When finished reviewing the timeline, click **Next Step**.

## Step 5: Complete questionnaire

Your questionnaire answers help Tungsten Network understand your invoicing requirements and determine which invoice scenarios need to be tested. The questions differ for Custom Map and Master Map implementations as well as single-buyer and multi-buyer implementations.

> ⚠ Be sure to click **Save** frequently to save your work. If you navigate away from this screen without saving, your selections will not be saved.

1. Select an answer for each question.

   **Suppliers connecting to single buyers only**: For more information about a question on this screen, hover over the question mark icon.

   **Suppliers connecting to multiple buyers only**: Some questions are account-level and selected answers are applied to all buyer profiles. Other questions list each buyer profile and different answers can be selected for each. To view the list of buyers included in a buyer profile, click **View Buyers**. To select different answers for different buyer profiles, do one of the following:

   - Select a response, then select all the buyer profiles to which you want to apply the response, and click **Apply**.
   - Select a response for each buyer profile individually.
2. **Custom Map only**: With a Custom Map implementation, you must upload an example of your ERP invoice file along with other supporting documents.

   The following file formats are supported: txt, xml, csv, edi, idoc, dat.
3. When finished, click **Next Step**.

## Step 6: Review requirements

The **Review Requirements** screen outlines the data required to be included on the test invoice files you will create for all relevant invoicing scenarios, as determined by your questionnaire answers. The information on this screen is read-only and cannot be edited.

1. Review the list of required data to be included on test invoice files.

   Mapping elements are categorized as **Mandatory**, **Conditional**, or **Optional**, based on Country or Buyer requirements. For implementations with multiple buyers, you can view data for one buyer profile at a time. If you notice invoice requirements missing from the list, create a ticket.
2. **Optional**: To export the data to a Microsoft Excel document (including the lists of standard Tungsten Network Currency Codes, Invoice Type Codes, Tax Category Codes, and Unit of Measure Codes) for offline review or to share with another user, click **Export**. For implementations with multiple buyers, you can export data for one buyer profile at a time.
3. Create test invoice files containing all data required, as outlined on this screen.
4. When finished, click **Next Step**.

For onboarding suppliers connecting to multiple buyers, this is the last step of the implementation using the Supplier Connect portal. After clicking **Next Step**, you see an **Implementation Under Process** status screen and your implementation specialist contacts you with the next steps. The rest of your implementation is handled offline with help from the Tungsten Network implementation team. For onboarding suppliers connecting to a single buyer, continue to Step 7: Upload test invoice files.

## Step 7: Upload test invoice files

On this screen, upload the test invoice files you created that contain all required elements and identify which test scenario each invoice satisfies.

This screen is for onboarding suppliers connecting to a single buyer only. Onboarding suppliers connecting to multiple buyers receive further instructions about creating and uploading test invoice files from their implementation specialist and complete this step offline with the Tungsten Network implementation team.

1. To upload your test invoice files, do one of the following:
   - Drag and drop test invoice files onto the screen.
   - Select the **click here** link to select test invoice files.

   The following file formats are supported: txt, xml, csml, idoc, dat, csv, edi, x12, msg, shell, seq, ftp, ext, pdf, file, idocxml, json.
2. For each test invoice file you upload, select which scenarios the invoice satisfies. More than one scenario can be selected for each file.
3. If a scenario is not applicable:
   - You can remove a scenario from the list by clicking the **X** before assigning it to a test invoice file.
   - You can remove a scenario after assigning it to a test invoice file by creating a ticket.

   The Invoice scenario is mandatory and cannot be removed.
4. When finished, click **Send for review**.
   Tungsten verifies that the test files are structured properly and uses the files to create sample invoices for you to review. While being reviewed by Tungsten, the uploaded test files are listed under their respective scenarios and can be downloaded but not deleted. You can continue to upload additional test files while Tungsten reviews your uploaded files.
5. **Optional**: Once Tungsten approves the sample invoice files for the Invoice scenario, you can request that Tungsten start mapping by clicking **Initiate Mapping**. You can continue to upload test files against other scenarios while Tungsten begins mapping.
6. When Tungsten notifies you that verification is complete and all files are acceptable to proceed with mapping, log back in, navigate back to this step, and click **Next Step**.

## Step 8: Review test invoice files

On this screen, you (and your buyer, if applicable) review the sample invoice files created by Tungsten and confirm they are correct.

This screen is for onboarding suppliers connecting to a single buyer only. Onboarding suppliers connecting to multiple buyers receive further instructions about reviewing and approving invoice test files from their implementation specialist and complete this step offline with the Tungsten Network implementation team.

1. Review each test invoice file and do one of the following:
   - Click **Approve** if the invoice format doesn't require changes.
   - **Add a comment** and click **Reject** if the invoice format requires changes.

     When an invoice is rejected, a support ticket is raised automatically. Tungsten edits the invoices based on your feedback and uploads them again for your review. You receive an email when the sample invoices are ready to be reviewed again.
2. **Optional buyer review**: If your buyer opted to review the sample invoices, a notification email invites the buyer to log in to the Tungsten Network Portal to review the invoices once they are approved by you.
3. Once all scenarios are approved by you (and your buyer, if applicable), click **Next Step**.

   You see an **Invoice Testing Completed** status screen while Tungsten runs final checks to make sure you are ready to transact on the Tungsten Network. You receive an email when these checks are complete.

## Step 9: Confirm go-live date

The go-live date is the date you expect your first live invoice to be sent across Tungsten Network. Based on the go-live date, Tungsten can notify your buyer when to expect an invoice.

This screen is for onboarding suppliers connecting to a single buyer only. Onboarding suppliers connecting to multiple buyers receive further instructions about their anticipated go-live date from their implementation specialist and complete this step offline with the Tungsten Network implementation team.

1. Review the go-live date.
2. **Optional**: To edit the go-live date, click the date to launch the **Go-live date change** window. When finished, type a reason for the change and click **Save**.
3. When ready to confirm the date, click **Next Step**.

If your account has an unpaid balance overdue to Tungsten Network, you cannot Go Live. As the due date approaches, a warning message appears at the top of every screen on the Supplier Connect portal. If the payment deadline has passed, the account is placed on hold and the Next button appears disabled. When you submit the payment, click **Contact Us** and upload the receipt to restore access to the portal.

## Step 10: Ready to transact

Congratulations! You are now ready to start e-invoicing.

This screen is for onboarding suppliers connecting to a single buyer only. Onboarding suppliers connecting to multiple buyers receive further instructions about their ready to transact status from their implementation specialist and complete this step offline with the Tungsten Network implementation team.

1. Click **Go To Portal** to access the live Tungsten Network Portal. Use the same credentials you used for the Supplier Connect portal to log in.
2. Begin uploading live invoices via Tungsten Network.

Tungsten reviews the first three invoice files you upload to ensure they are processing smoothly.

# Related actions

This section includes information that may be helpful as you work through the Supplier Connect implementation process.

Invite a user

Change map type

Settings

Help & Support

## Invite a user

You can invite another user from your organization to help with the completion of any step in the implementation process by clicking the **Invite** tab.

- To request help from an existing implementation user, select a user from the list, add an optional note, and click **Send**.
- To invite a new user to the implementation process, click **Add new user**. Enter the user's information into the form and click **Send**. The user receives an email invitation to log in and join the implementation.

If a user was invited to the implementation but has not yet logged in, click **Settings** > **Manage Users**. Then click the **Re-send** button next to the user's name to send a reminder.

## Change map type

Contact your Tungsten Network implementation specialist to discuss the differences between Master Map and Custom Map implementations and which map type is best for you.

To switch your map type from Custom to Master or Master to Custom after your implementation has begun, do one of the following:

- **For suppliers connecting with a single buyer**: Click **Home** > **Switch**.

  Once a map change is requested, the implementation is put on hold while Tungsten takes internal action. In this situation, a **Map Change Request** status screen is displayed.

If you previously completed any steps beyond **Review steps and timelines** with the previous map type, they need to be completed again, with the exception of the questionnaire answers, which are saved and can be updated if necessary.

- **For suppliers connecting with multiple buyers**: Contact your Tungsten Network implementation specialist to discuss switching map type.

# Settings

The account administrator can update company details, manage users, and change passwords on the Settings screen. Non-administrator users can update their personal details and change passwords on the Settings screen.

**Company Details**: The administrator can update company details at any time by selecting **Settings** > **Company Details**. When finished, click **Save**.

**Manage Users**: The administrator can edit existing users by selecting **Settings** > **Manage Users**.

- Click **Edit** to edit personal details.
- If a user was invited to the implementation but has not yet logged in, click **Re-send** to send a reminder.
- Click the **Delete** icon to remove a user's access to the Supplier Connect portal. You must verify you want to revoke access. The administrator user cannot be deleted.
- To change the administrator, submit a ticket.

**Your Details**: Non-administrator users can update their own personal details by selecting **Settings** > **Your Details**.

**Change Password**: All users can change their password by selecting **Settings** > **Change Password**.

# Help & Support

**Create Ticket**: Click **Help & Support** > **Create Ticket** to contact Tungsten Network by creating a ticket. The Create a Ticket screen opens in a new browser tab.

After submitting a ticket, you receive an email confirming your issue has been received. You receive a second email confirming your issue is being worked on. You then receive a response requesting more information or with a resolution.

**View Tickets**: Click **Help & Support** > **View Tickets** to view open, resolved, and closed support requests in a new browser tab.

- **Open Tickets** tab: Expand any item to view the ticket details, history, and status. You can add comments to open tickets.
- **Resolved Tickets** tab: Expand any item to view the proposed solution. If you click **Accept** to accept the resolution (or do not respond within 15 days), the ticket is closed. If you are not satisfied with the solution provided, click **Re-Open** and add a comment and attachment.
- **Closed Tickets** tab: Expand any item to view read-only details. You cannot take any action on a closed ticket.

**User Guide**: Click **Help & Support** > **User Guide** to view this guide on the Tungsten Network Support site.