Amber Road
POWERING GLOBAL TRADE

SUPPLIER DASHBOARD

USER'S MANUAL

V15.3

Contents

Chapter 1 | Overview

When you receive a Campaign from a campaign manager, you are requested to respond back with the qualification eligibility or Country of Origin details for a set of parts that depend on the type of Campaign.

Supplier Dashboard

To respond to open campaigns, you must login to the Suppliers Dashboard to perform several actions related to campaigns like, entering details for the requested parts, resolving holds for existing campaigns, view information related to parts, create/review/generate responses, and review documents related to the campaign. When logging in for the first time, you will receive the application URL, username and the password. After you successfully log-in, you will be able to view a standard Supplier Dashboard that is auto-configured for you.

The Supplier Dashboard is divided into the following sections:

- My Campaigns
- My Clarifications
- My Resources

Note: The Dashboard allows you to sort campaigns by **Need By Date**, **Response %**, and **Newest**. You can also filter by **FTA Code**.

My Campaigns

In this section, you can view the list of open Campaigns that need your action. Each open Campaign is identified by an agreement and listed with the following details:

Field	Description
Campaign Name	Displays the name of the Campaign
Need By Date	Need date specified in the Campaign
Organization	The ORG code of the Campaign
Campaign Manager	Role Name of the Campaign Manager
Supplier Name	Code of the Supplier
Percentage Complete	Displays the percentage of completion
Days Overdue	Displays the number of days the Campaign is due for submission

Field	Description
Parts	
Total No. of Parts	Total number of all Parts
Parts in Open Status	Number of Parts that are in Open status
Ready to Submit	Number of Parts that are ready to submit
Submitted	Number of Parts that are submitted
Accepted	Number of Parts that are accepted
Cancelled	Number of parts cancelled
Responses	
Responses	Total Number of Responses received.
Submitted	Number of Responses submitted
Accepted	Number of Responses accepted
Rejected	Number of Responses rejected
Cancelled	Number of Responses cancelled

Start Campaign Response: This button is visible only if it is a new Campaign. When you click on Start Campaign Response, you will be navigated to the Campaign Profile page, if there are 'Holds' to be resolved.

Resume Campaign Response: This option is visible if you have not completed the Campaign.

When you click on **Resume Campaign Response**, you can view the **Parts Details** page and respond to the Campaign in the Campaign Summary page where you can also create/review certificates, submit, and review responses. For more information on this, refer to section titled '*Responding to Campaigns*' on page 6.

Note: If there are any 'Holds' on a campaign, you will be navigated to the Campaign Summary page where you can resolve holds. Any 'Holds' will be listed in the Messages window on the bottom of the Campaign Profile page.

New Discussion Thread: Allows you to raise a new clarification.

Note: You can sort and filter open Campaigns By Need Date, By Response % and by Newest. Additionally, you can also filter Campaigns by FTA.

My Clarifications

In this section, you can view the list of all the latest clarifications sent and received between you and the Campaign creator. If there are more than three clarifications for a Campaign, you can navigate to the rest of the clarifications using the **More** link. You can also view and send clarifications from each Campaign.

My Resources

In this section, you can view the following sub-sections:

- My Profile
- Help & Training
- View Training Videos
- Past Responses
- Support Question

My Profile – Allows viewing and editing the profile of the logged-in Supplier. You can perform the following actions:

- **View Profile** - Allows you to view/modify your profile, access, and documents (also view Update Signature).
- **Change Password** - Allows you to change your password
- **Change email ID** - Allows you to change your email ID
- **Update Signature** - Allows you to view/modify/add signature that can be used while generating a document.

Help & Training - Allows you access to training material related to the Supplier Dashboard. This section lists the following documents:

- Supplier Help Guide
- Supplier FAQs

View Training Videos – Allows you to view training videos on the following topics:

- Dashboard Overview
- Responding to a Campaign
- Resolving Campaign Errors
- Using Excel Upload
- Clarifications Overview

Past Responses - Allows you to search for and view all the past campaign responses you completed.

To view past Campaigns, follow the steps below:

1. On the Supplier Dashboard, within the **My Resources** section, click **View Past Responses**.
2. Choose the **Search Criteria** for Campaigns. Click **Search**.

Note: Additionally, you can also search using Advanced Search.

3. To open one or multiple Campaigns, select the check-box for **Campaign ID**(s) for respective Campaign(s).

Note:	Since the responses are records of past data, the data in the Campaign is read-only and you will not be able to edit the campaign. However, you will be able to set new clarifications for a completed Campaign.

Additionally, you can also view the Generated and Uploaded Certificates.

Support Question – Allows you to send queries to the Amber Road Support Team using the **Ask a Support Question** option. Click the option to enter Subject and Description and click Send. The email is sent to the Support team and you will receive replies to your queries.

Responding to Campaigns

Responding to Campaigns is a four-step process.

You can:

1. Create a response
2. Review Certificates
3. Submit Response
4. Review Response

For more information on what each of these steps entail, refer to section titled '*My Responses'* on page 7.

You can either respond to a Campaign by submitting the response for all the parts at once or respond at different time intervals. The submitted parts are consolidated in a batch and considered as a Campaign Response. Each Campaign can have multiple Campaign Responses based on the time intervals you have responded.

To respond to a Campaign, in the dashboard, click the **Start Campaign Response** option if it is a new Campaign OR click **Resume Campaign Response** option if it is an incomplete Campaign.

Once you click one of the above options, you will be able to view **Campaign Details** page that displays the Header summary and the following sub-sections:

- Campaign Summary
- My Responses
- My Clarifications

Campaign Summary

The Campaign Summary page displays the Blanket dates, Reference number, Importer, Exporter, Producer, and the View Campaign Header button.

CAMPAIGN PROFILE

The View Campaign Header enables you to view and edit the Campaign profile of the logged-in Supplier. The Campaign Profile page displays details pertaining to the Parts, Partners form details and the signature.

Note: If the document is not signed, the Supplier must download the system-generated document, sign it and then upload it back to the application.
The header Holds need to be resolved before navigating to the Campaign Summary page.

PARTS AND RESPONSES

This section displays the parts details such as the Total Parts, Open Parts, Responses, and the state of the part, part count, and the percentage of completion of the part state. You will be able to perform the four-step process in this section.

Note: If there are part-level holds, you can resolve such holds by providing mandatory part information by using either of the 2 options on the Parts and Responses section:

Respond Online. You can click 'respond to this campaign online' to respond to one or multiple part information within the Parts Details View page. Select the checkbox of the respective Parts and click Create Response.

Note: You can generate responses/certificates only for Parts which are in the 'Pass' status. You will be prompted to resolve holds for any Parts before you can generate responses/certificates.

Download/Upload Part Details. You can click 'in Excel' to download the Part Details information in Microsoft Excel.

Note: If the certificate has not been generated within the Parts Details page, the Campaign Summary page will display an additional section to '**Generate the Certificate**'.

My Responses

This section displays details about the Campaign responses created and the statuses of the responses. It displays a graphical representation of the four-step process as and when each step completes.

You will be able to provide campaign responses by going through the four-step process. The four-step process is represented by a graph on the Dashboard. The four steps are:

1. Create Response
2. Review Documents
3. Submit Response
4. Response Review

CREATE RESPONSE

You can create responses from the list of parts that are sent by the Campaign Manager for solicitation. You can edit the parts before creating the responses using any of the following two options:

- **Respond Online** - When you click this option, the Parts Detail View page opens. The parts are listed along with the Header Summary. For each part, you can view the details such Info icon, Product ID, Description, COO, etc. For the parts listed, you can perform the following actions:

    - **Download Spreadsheet** – You can edit the parts and select this option to download the edited Parts in the spreadsheet and save it in your local system. The download occurs asynchronously.
    - **Mass Update** – With this option, you can select and edit multiple parts in a single instance. Within the Part Details View page, click on the drop-down list box for Actions.
- **Download File** – When you click this option, all the Parts are downloaded as a Microsoft Excel spreadsheet into default download location.

Once all the part details are edited, you can create responses using the following two options:

- **Create Response Online** - With this option, you can create a response for the parts that are edited and ready to submit. When you click this option, you get a notification confirming the creation of a response.
- **Upload File** - Allows you to upload the parts using the excel sheet from your local system.

Once the Campaign Response is created, you are notified that the response is created and you need to review the documents.

Simultaneously, the following updates occur:

- **My Responses** section is created and each Campaign Response is identified by a unique Response ID.
- Status displays as "Ready to Submit"

A graphical and procedural representation of the four-step process is maintained at each Campaign Response level. As you progress, the status is updated.

The **View Submitted Parts** and **View Generated Certificates** links display.

Note: The View Submitted Parts display the Parts that have been already submitted, if any. In case, of no parts submitted, then you will not be able to view the link.

REVIEW DOCUMENTS

The next step is to review the documents that are generated after you have created the Campaign Response.

To view the generated documents:

1. Click the **View Generated Certificates** link. The **Campaign Documents** page opens.

Note: All documents pertaining to the Parts and its corresponding agreement are listed in the Documents tab. By default, the Campaign Documents page is on HOLD to ensure that the documents are reviewed and signed by you.

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2. Check the **Signature** check box which ensures that the document is reviewed and signed by the authorized signatory.

Note: In case, there is no signature available and the Use Signature option is not selected in the Campaign Profile, then the generated documents will have no signature. The system will prompt you to manually upload the signed document against each of the generated document. You will have to download the system-generated document, sign it and upload it using the Upload link in download the system-generated document, sign it and then upload it back to the application.

3. Click **Save and Validate**. The Campaign Documents page changes the status from HOLD to PASS.
4. Navigate back to the **Campaign Summary** to submit the response.

MY RESPONSES

Once the documents are reviewed, you will need to submit the responses. During this step, you can perform the following actions:

- **Submit Response** - By clicking this option, you will be prompted with a message informing that the parts and documents will be submitted to the Campaign Manager for review. After the response is submitted, you will receive an email notification if the response is accepted or rejected. If the response is rejected, the parts are updated back in the Campaign as Open and you will have to follow the process from Step 1.
- **View or Upload Certificates** – By clicking this option, you will be able to add/review/delete campaign-related documents. You can use the Category drop-down box to filter the category of documents to view. In case, you want to upload a signed document, you must first download the generated document, sign it and then upload it using Upload Certificates

Note: **Checking the 'Documents Reviewed check**-box confirms that the documents have been reviewed and signed by an authorized signatory.

- **View Parts** – Allows you to view additional information of the parts in the campaign.
- **Cancel Response** - By clicking this option, the parts will revert in the response in PASS status and the documents that were generated will be invalid for submission. The Response record is deleted from the Campaign Summary UI.

RESPONSE REVIEW

The four-step process completes when the Campaign Manager receives the response and responds by accepting, rejecting or cancelling the response.

- If the response is accepted, the Response ID is updated as Response Accepted and the response is complete.
- If the response is rejected, the Response is updated as Response Rejected; the parts revert to the Pass status and the response is closed.
- If the response is cancelled, the Response is updated as Response Cancelled; the parts revert to the Pass status and the response is closed. If you want to respond to the parts again, you will have to create the response again from Step1.

There are email notifications sent and received in the following scenarios:

When the Campaign response is created:

The Campaign creator receives an email notification that a Campaign is responded with the list of the parts. The Supplier receives an email that the Campaign response is sent to the Campaign creator.

When the Campaign response is submitted:

The Campaign creator receives an email notification that a Campaign is submitted with the list of the parts.

When the Campaign response is accepted:

The Supplier receives an email that the Campaign is accepted. The Campaign creator receives an email that the Response Accepted mail is sent to the Supplier.

When the Campaign response is rejected:

The Supplier receives an email that the Campaign is rejected. The Campaign creator receives an email that the Response rejected mail is sent to the Supplier.

When the Campaign response is cancelled:

The Supplier receives an email that the Campaign is cancelled. The Campaign creator receives an email that the Response Cancelled mail is sent to the Supplier.

CAMPAIGN COMPLETE

If the Campaign is accepted or cancelled by the Campaign creator, the Campaign is considered as complete and you will no longer see the Campaign in the Dashboard. The completed Campaigns can be viewed in the Past Responses UI.

My Clarifications

This section displays the clarifications for a Campaign. You can perform the following actions:

- **New Clarification** – enables you to create a new clarification that will be sent to the Campaign creator. You will receive a notification email once the clarification is sent.
- View All – enables you to view all the clarifications for the Campaign.