SUPPLIER ENABLEMENT/ONBOARDING CHECKLIST

Identify supplier enablement type, review the requirements, and complete the set-up steps required.

☐ Base E-commerce (Request for Quote)

Suppliers not requiring a catalog; EqualLevel will setup the supplier in the EqualLevel Network to receive RFQs, send quotes, and receive orders. Supplier has or will be set up with an EQL GO Store for quotes and order management.

Base E-commerce Set-up Steps:

☐ Supplier point of contact (POC) will receive an e-mail invitation to activate their account in the Network
☐ POC can review and update e-mail notifications for receiving RFQs and orders
☐ POC can add colleagues to provide access to the Network
☐ Submit custom request form to E&I Marketplace Administrator (if needed)

☐ GO Store (EqualLevel Punchout)

Suppliers capable of providing a spreadsheet of items for a catalog; a spreadsheet with line-item information (description, item number, contract price) for the products or services under contract.

GO Store Set-up Steps:

☐ EqualLevel will e-mail POC to schedule GO training
☐ Supplier completes store setup
      ☐ Creates spreadsheet of products/services using template
      ☐ Uploads E&I contract compliant catalog
      ☐ Reviews/updates notifications for RFQs and orders
      ☐ Configures GO Punchout storefront
☐ EqualLevel connects the GO store to the Marketplace for punchout and search

Please review Punchout Go Best Practices for E&I's recommendations to improve end user experience.

☐ **Punchout**

Punchout is a technology that connects the buyer's marketplace directly to a supplier's e-commerce site. The catalog on the punchout site is specific to the buyer's contract. A supplier with punchout capabilities will be set up in the EqualLevel GO Store so the supplier can enter necessary credentials for connecting to E&I Marketplace and all orders pass through to their system.

E&I Marketplace punchout catalog and order transmission requirements include:

(Confirm you can meet these requirements by checking the selection or provide explanation requested.)

☐ cXML punchout catalogs are the preferred catalog type

☐ It is **strongly preferred** that a UNSPSC commodity code be included for every item in the catalog. Providing UNSPSC codes for items will increase the likelihood of your items being found for searches in the Marketplace

☐ UNSPSC codes must be in the 8-digit format

☐ Orders will be sent electronically using cXML

☐ Ship-To & Bill-To addresses will be sent in orders at the header level. In cXML orders, each address will have a unique Address ID

☐ A list of addresses is not available in advance. Shoppers will create addresses during checkout that will be included in orders

☐ Payment method for orders may be either PO or p-card/credit card. If no card payment fields are included in a cXML order, the payment method is PO and not p-card

☐ Orders will include the following extrinsic fields:

     MemberName - The name of the member organization

     MemberNumber - A unique number identifying the member of the user placing the order

☐ Orders will be sent from many different E&I members

     ☐ Can you accommodate a single punchout with multiple accounts and provide account specific pricing based upon user credentials? **Please provide details:**

☐ How do you handle order confirmation & ship notices? **Please provide details:**

☐ How do you handle sales tax exemption? **Please provide details:**

☐ Are you able to provide navigation to return to the Marketplace from your punchout? **Please provide details:**

Punchout Set-up Steps:

☐ EqualLevel will email POC to schedule GO training session
☐ Supplier completes store setup
    ☐ Reviews/updates notifications for RFQs and orders
    ☐ Submits punchout and order credentials in their GO store
    ☐ Completes test cycle with EqualLevel and E&I Marketplace Admin
☐ EqualLevel connects the store to the Marketplace
☐ EqualLevel will follow up with POC on enabling search