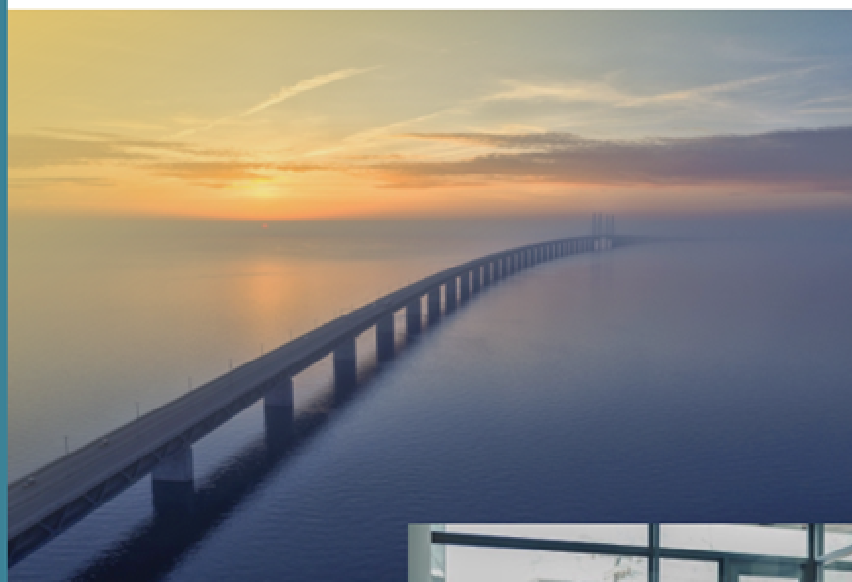


21.1 Release Notes

For Supplier Management Enhancements

Version: April 12, 2021 - Final Version

Table of Contents

Welcome

The **21.1 JAGGAER ONE Product Release** will be available in the production environment starting April 12, 2021. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides release notes for the **Supplier Management** solution. General release notes, additional solution-specific release notes, and other supplemental information such as a Feature Snapshot, are available on the Product Release Library:

https://library.jaggaer.com

Note: Please see the **21.1 Release Notes for General Enhancements** for information about key release dates and training opportunities.

This document will help you:

- Understand the impacts of new features on your end-users, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.
- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.

Feature Icon Key

Features may be added after publication of the Release Preview document. Additionally, in some cases, a feature may be included with a specific Product group for the Release Preview, but moved to another Product group for the full Product Release Notes. If there is a noteworthy change to a feature, the release note will be marked with one of the following icons:

New!	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
Updated!	Indicates that the feature release note has had a major update since the initial version of the release notes was published with the push to the test environment.
Moved!	Indicates that the feature release note has been moved to a different document since the initial version of the release notes was published with the push to the test environment.

Supplier Management

Following are updates to features in the JAGGAER ONE Supplier Management solution. Features in this section do NOT apply to the general supplier management that is bundled with other solutions.

Supplier Profile - Accounts Payable Enhancements

When entering accounts payable information in the supplier profile, the data needed can vary widely between countries, whether for foreign or domestic payments. With the 21.1 release, several enhancements allow additional flexibility for capturing accounts payable information based on the country selection. Also, the **IBAN** library has been updated to support the most current validations. More specifically:

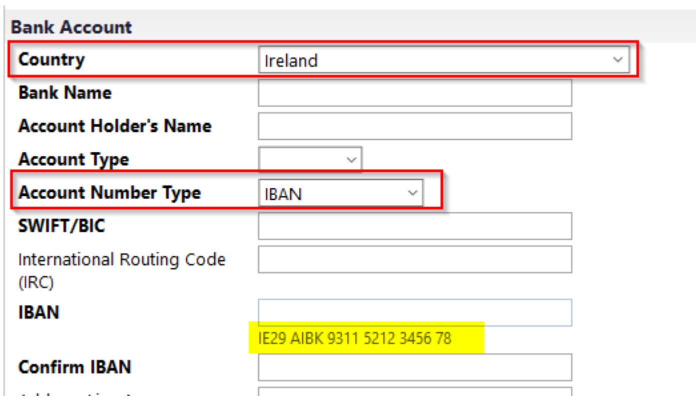
- The **Direct Deposit (ACH)** method now includes **four new fields** that previously existed only on the Wire Transfer method: Contact Name, Purpose, SWIFT/BIC, and International Routing Code (IRC). These fields can be configured as required on the Supplier Registration.
- For the **Direct Deposit (ACH)** and **Wire Transfer** methods, the **IBAN** field displays if a **Bank Account Country** supports IBAN. When an IBAN country is selected, an **Account Number Type** field displays if the Bank Account Country is one that supports IBAN, so the user can select **Account Number** or **IBAN**. With this release, there is additional flexibility around selecting the Account Number Type for a larger number of countries. If IBAN is selected, the IBAN field displays and, if available, the selected country's format is indicated below the field. If an invalid format is entered, an error message is displayed. A warning will be displayed in the UI if an existing IBAN is not consistent with the latest format.
- Five new **Flex Fields** are available for all Payment Methods in the Supplier Profile. The Flex Fields can be renamed for each payment method in Field Management. The fields can be configured as required on the Supplier Registration in a new **Flex Fields** section within **Entity** and **Individual Registration**.
- For all payment types, a **new "visibility" option** is available for configuration within the entity and individual supplier registration pages. The new option allows customers to dictate which fields they want displayed to suppliers based on the selected payment type. **Note**: This configuration only impacts supplier visibility. Customer users continue to have the ability to view and edit all fields for a given payment type.
- The **IBAN Library** has been updated to **version 3.0**, reflecting the most current list of countries utilizing IBAN and associated country formats. The validation happens automatically when the number value is entered, based on the updated library.

Customer Impact

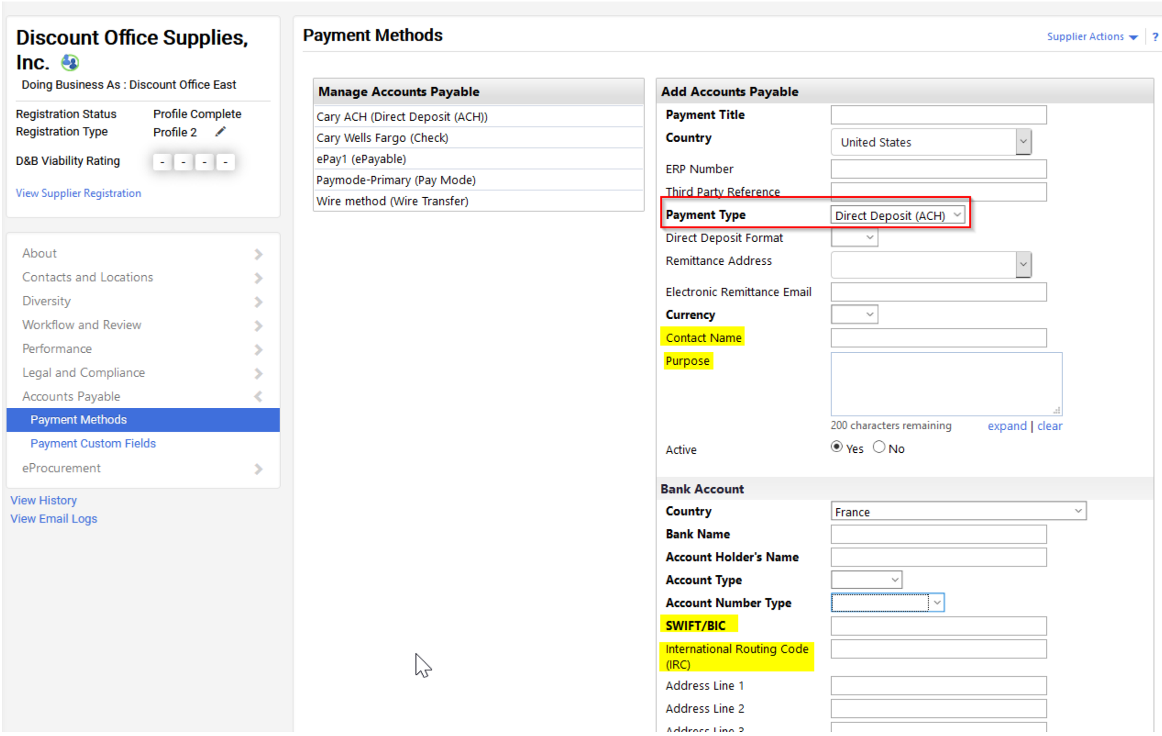
- Related Solutions: Supplier Management
- Feature Activation: This feature is **ON** by default but optional for use. Administrator configuration is also required.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

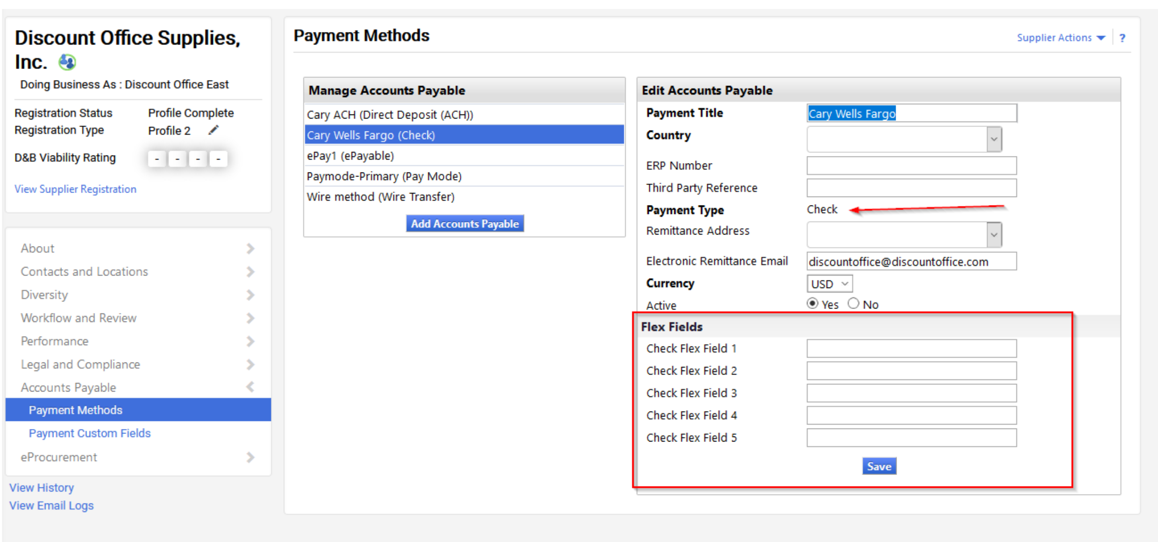
- **IBAN Library - Update to Version 3**. Users will see an error if an IBAN value does not meet the most current format standards.
  - When a user selects IBAN as the Account Number Type, the IBAN format will be validated according to the Bank Account Country requirements. If available, the country's format requirement is displayed below the IBAN field.



  - If an existing IBAN value does not meet the updated validation requirements, the user will be prompted to update the value upon saving the payment method record.
- Users will see four new fields available for Direct Deposit (ACH) Payment methods:
  - **Contact Name**
  - **Purpose**
  - **SWIFT/BIC**
  - **International Routing Code (IRC)**



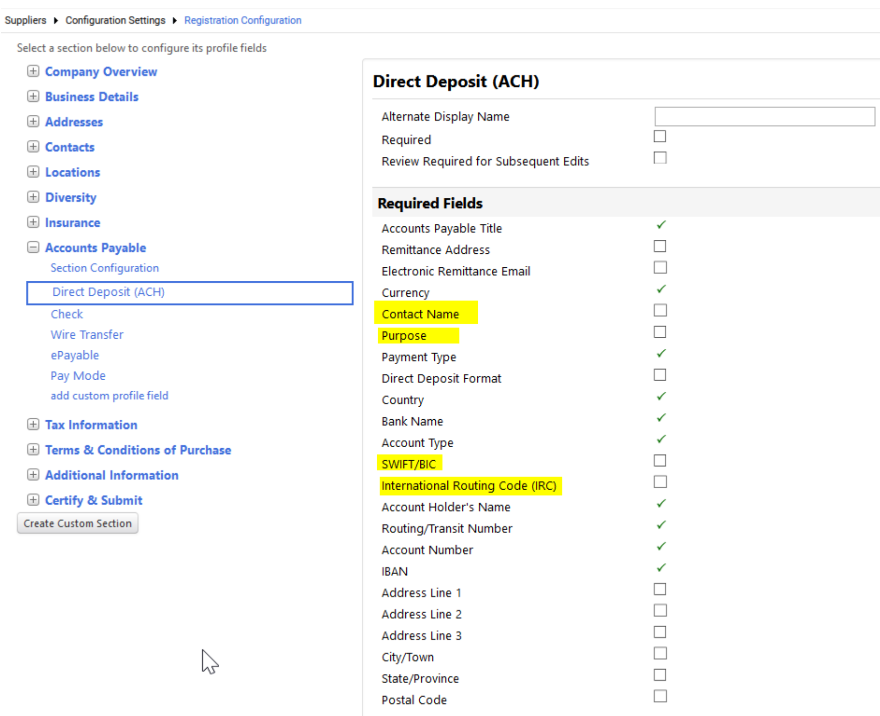
- Users may see up to five new **Flex Fields** in a separate section of all Payment Method types. **Note**: These fields may be labeled differently according to the organization configuration.



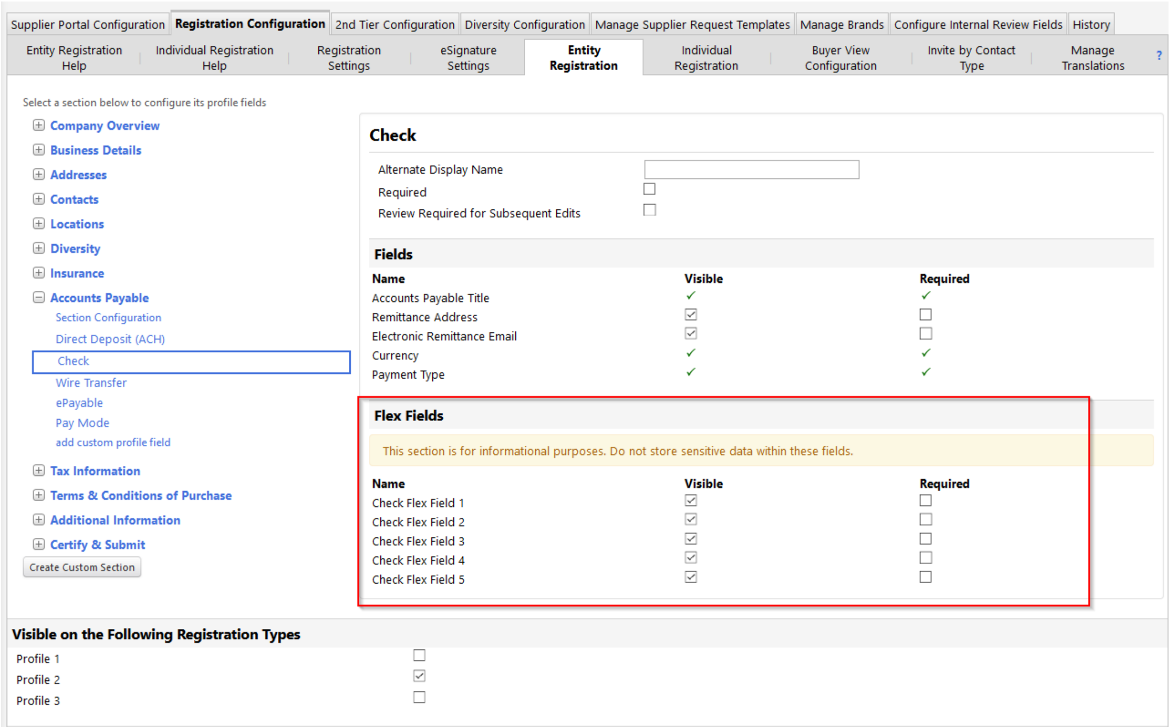
- Enter the information according to your organization's processes.

Administrator Impact

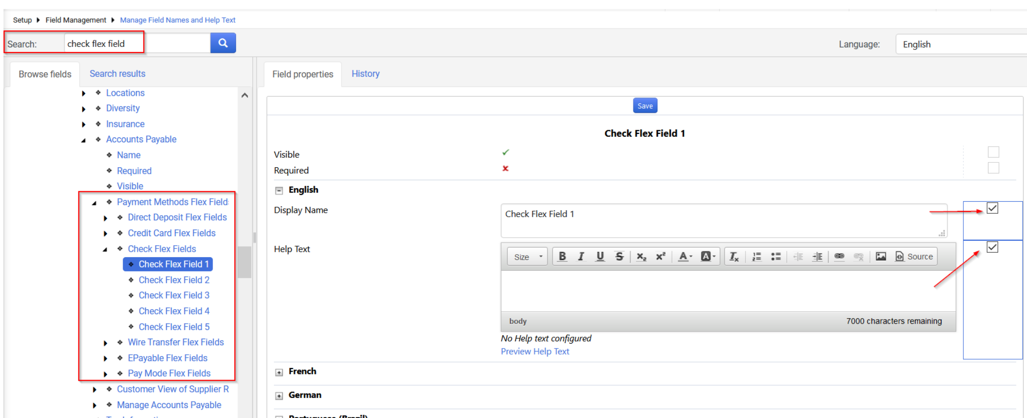
- The **IBAN library** has been updated to version 3.0, allowing for the most recent validations for format requirements based on country selection. Administrators do not need to take any other action for this feature.
- **New Fields for Direct Deposit (ACH) Payment Method.** Four fields previously available only on the Wire Transfer payment method are now available to be included in the Supplier Profile Registration when the **Direct Deposit (ACH) Payment** method is chosen. All fields are not required by default, but will display in the Supplier Profile and on the Registration Form if the payment method type is enabled.
    - **Contact Name**
    - **Purpose**
    - **SWIFT/BIC**
    - **International Routing Code (IBC)**



- **New Flex Fields for each Payment Method type**. Five new **Flex Fields** are available for ***each payment type*** configuration in the Supplier Registration. Enable the field as required for the specific payment method if appropriate.

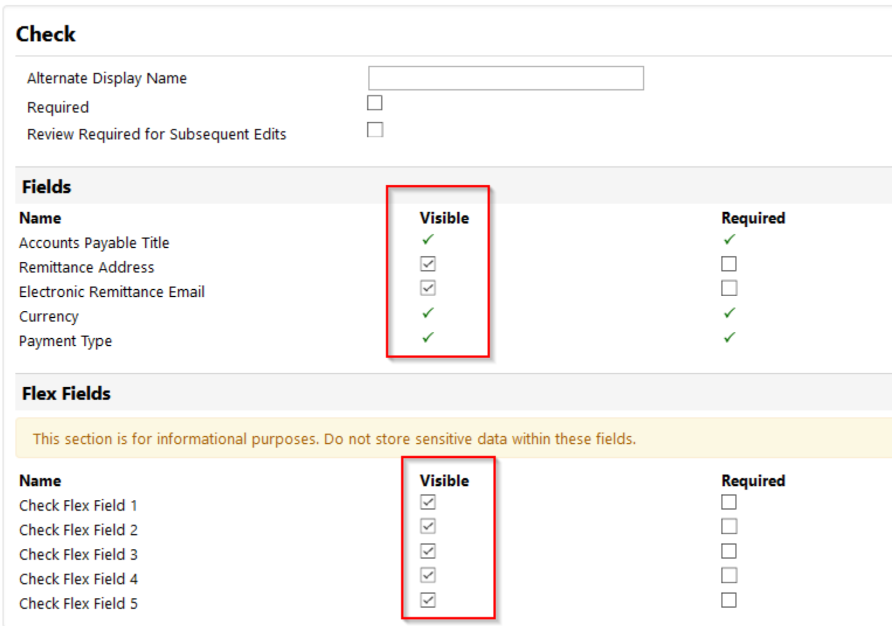


- Update the **Flex Field** display name and provide Help Text via Field Management. The Display Name and Help Text can be updated for each specific payment method.



- Navigate to **Setup** **> Field Management > Manage Field Names and Help Text**.
- In the Search box, enter "*[payment method]* Flex Field". The fields show in Search results. Select the **Browse fields** tab.
  - Alternatively, initially select **Browse fields** tab and click to expand the following values: General > navigation > supplier management > Administration > Registration Configuration > Entity Registration (or Individual Registration) > Accounts Payable > Payment Methods Flex Fields. Expand the fields for the Payment Method.

- Select the appropriate payment method (i.e. Direct Deposit, Credit Card) Flex Fields heading.
    - Select a **Flex Field**.
    - To change the **Display Name**, click the override checkbox and enter a new name.
    - To enter **Help Text** that will be displayed to the end user, click the override checkbox and enter the appropriate Help Text.
    - Select other language options to provide translated display names and help text, if appropriate.
- **New Visible setting for payment type fields** - A new **Visible** setting is available for all fields on all payment types.



- With 21.1, the **Visible** setting will be enabled by default, so that supplier users will see no change in field visibility.
- The **Visible** setting cannot be changed for fields **Required** by the system.
- A field must be enabled as **Visible** in order to be enabled as **Required**. If a user selects **Required** for a field that is not **Visible**, a warning message displays and the page cannot be saved.
- The **Visible** setting applies to the supplier user view only. Customer users viewing the supplier's profile will continue to see all fields.

Third-Party Integration Impact

- The **Supplier XML Export** and **Supplier Import** is updated to include the new fields for Direct Deposit and the new Flex Fields for all payment methods. Contact JAGGAER for details.

Supplier Impact

- Suppliers will see the new fields for Direct Deposit and new payment method Flex Fields for the Supplier Network Portal.

  Suppliers will see the new fields for Direct Deposit and new payment method Flex Fields if configured for a Customer Branded Portal.

- Suppliers will see the same selections and validation as described above when choosing IBAN as the Account Number Type.

Ability to Require Supplier Contact Mobile Number in Supplier Registration

With this release, a new **Mobile Phone Number** is available when adding **Contacts** to a Supplier Profile (see **Supplier Profile - New Mobile Number Field for Supplier Contacts** in the **21.1 General Release Notes**). Supplier Management customers also have the ability to require the **Mobile Phone Number** for a contact type in **Supplier Registration**.

Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **ON** by default but optional for use.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- If the **Mobile Phone Number** is configured as required for a contact type, users will be required to enter a **Mobile Phone Number** when adding that contact type to the Supplier Profile.

Administrator Impact

- Administrators can include the Mobile Phone Number in supplier registration profile for any contact type.
- Navigate to **Suppliers** > **Configuration Settings > Registration Configuration**: **Entity Registration** or **Individual Registration**.
  - Expand **Contacts** section.
  - Select the contact type.
  - Note the **Mobile Phone Number** field in the **Required Field** section. Select the checkbox if it should be required in the Supplier Profile form for this contact type. If the checkbox is not selected, the field will display but is not required in order to save the contact information.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- Suppliers will see the **Mobile Phone Number** field if included or required in a **Customer Branded Portal Registration Form**.

Ability to Configure Supplier Profile Fields as Read-Only to Customer Users

Customers are able to configure whether or not fields display on a **Supplier Registration Profile** and if they are required. Customer users have the ability to edit supplier profile fields according to their user permissions (assigned by an administrator at the role or user level). Some organizations would like to limit the ability of customer users to edit specific fields within the supplier profile. With the 21.1 release, a new **Buyer View Configuration** page is available to indicate which fields should be displayed to buyer users as read-only in supplier profile. The configuration applies to all users for all supplier profiles. There is no change to the supplier's ability to edit the fields according to the **Entity** or **Individual Registration** configuration.

Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- If an administrator has configured a supplier profile field as read-only, a user will not have the ability to edit the field in the supplier profile, regardless of enabled permissions.

Administrator Impact

- A new **Buyer View Configuration** page is available under **Suppliers > Configuration Settings > Registration Configuration**. On this page, select the fields that buyer users should have the ability to view but not to edit in the supplier profile.
- The following **Fields** can be configured as read-only:
  - Legal Company Name
  - Doing Business As (DBA)
  - Country of Origin
  - Dun & Bradstreet Number (DUNS)
  - Legal Structure
  - Tax ID Number
  - VAT Registration Number
  - Supplier Number
  - Third Party Reference Number
  - VAT Exempt
  - Are you exempt from backup withholding?
  - Website
  - Supplier Tax Representative ID
  - Commercial Registered Court
  - Supplier Registered Seat
  - Supplier Commercial Registration Number
  - Year Established
  - Number of Employees
  - Business Description
  - Supplier Capital
  - Supplier Shareholders
  - Annual Revenue/Receipts
- The following **Sections** can also be configured as read-only:
  - Supplier Classes
  - Commodity Codes
  - Enabled Currencies

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Additional Key Points About the Feature

- If a field or section is configured as **Buyer Read Only**, no users will have the ability to edit the field, regardless of user permissions. The configuration applies to all users on all supplier profiles.

Supplier Impact

This feature does not impact suppliers.

Adobe Sign Option for Tax Documents in Supplier Registration New!

Customers currently have the ability to use **DocuSign** to include document templates for electronic signature in supplier registration custom fields and for electronically signing tax documents. With this release, **Adobe Sign** can now be selected in **eSignature Settings.** When configured, if a Tax Document has **e-Signature Required** enabled in the Supplier Registration, the supplier will access, review, complete and sign the tax document via **Adobe Sign**.

Note: This feature applies only to the signature of Tax Documents. If Adobe Sign is configured in eSignature Settings, the option to configure custom profile fields as eSignature Documents is no longer available.

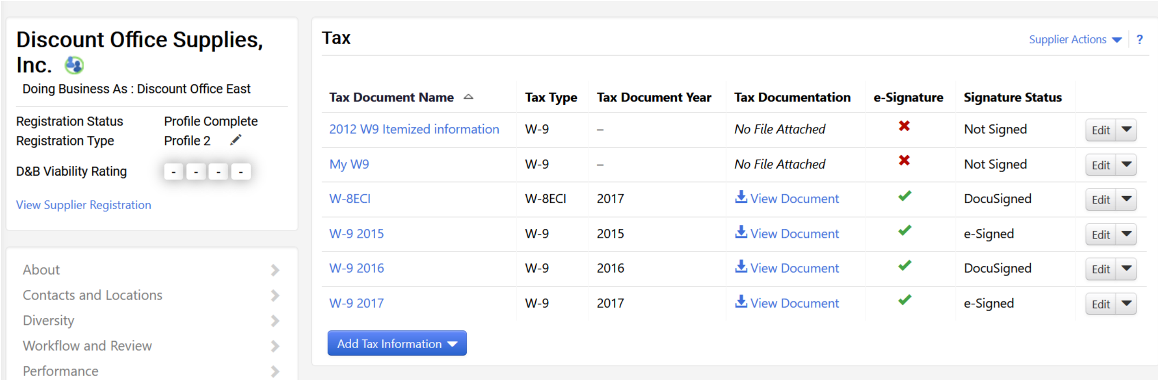
Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- If a user completes the Tax Document information via Proxy view, on behalf of the supplier, they will be required to sign a tax document via **Adobe Sign** if configured for the organization.
- As with DocuSign, users reviewing the supplier's Tax information in the customer view of the supplier profile (**Suppliers** **> Manage Suppliers > Search for a Supplier > [selected supplier] >**

Legal and Compliance > Tax page),



Administrator Impact

- Administrators can now enable **AdobeSign** for eSignature. First, you must enable the organization to use eSignature and configure the connection settings for AdobeSign. Second, you must enable the eSignature Required element for the tax document to the supplier registration.

Configure the eSignature Organization Settings

1. Navigate to **Suppliers** **> Configuration Settings > Registration Configuration > eSignature Settings.**
2. The **eSignature Service Provider** field has a default value of **None**. To enable the feature or to change from DocuSign selection, click the **Edit** link. The **eSignature Setup** overlay displays.
3. Select **Adobe Sign** as the **eSignature Service Provider**. Click **Activate**.
4. Enter the **Adobe Sign** **User Name** and **Password** for accessing the templates to be used for the eSignature document custom field.
5. When saved, the **eSignature Settings** section displays the **User Name** and masked **Password** on the page. Select **Test Connection** to test the login credentials and verify you can sign into **Adobe Sign** as expected.

Configure the Supplier Registration - Tax Documents

1. Navigate to **Suppliers** **> Configuration Settings > Registration Configuration.**
2. Select **Entity Registration** or **Individual Registration** tab.
3. Navigate to the Tax Information section and expand to see the list of tax documents.
4. Select the tax document to be configured.
5. Enable the **e-Signature Required** field.
6. Click to **Save** your configuration options.
7. All changes are logged in on the **History** tab.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- If a tax document requires e-Signature with Adobe Sign, when the supplier selects to sign the document, supplier will receive an email whereby they can review and sign the document via Adobe Sign.