



Maintenance Release Notes

For JAGGAER ONE Solutions

Documented Changes between the 20.3 and 21.1 Releases -
Updated Thursday, February 25, 2021

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Welcome

What Are Maintenance Releases?

Maintenance releases are minor software upgrades that are scheduled between major release dates. The purpose of these releases is to accommodate minor feature requests from clients, the promotion of corrected defects, and activities for client go-lives. Maintenance releases generally occur every two weeks. However, this document is updated only when there are features affecting customers in a maintenance release.

Please refer to this document at any time for an updated list of changes and features for the following **JAGGAER One** solutions:

- eProcurement
- Invoicing
- Supplier Management
- Contracts+
- Sourcing
- Spend Analytics
- Savings Management
- Inventory Management
- JAGGAER ONE Supplier Network

NOTE: Only defects and features deemed significant to the JAGGAER One customer base are included in this document. Occasionally changes will warrant additional communication, and in this case, an email will be sent to administrators communicating these changes.

How this Document is Organized

The information in this document is presented by solutions. Within each grouping, the information is presented in chronological order.

Maintenance Release Schedule

Maintenance releases occur Thursday nights (approximately 9pm, ET). Maintenance releases do not affect your ability to access and use your site. A site outage is not required.

Below is a list of scheduled maintenance releases occurring between the 20.3 and 21.1 releases:

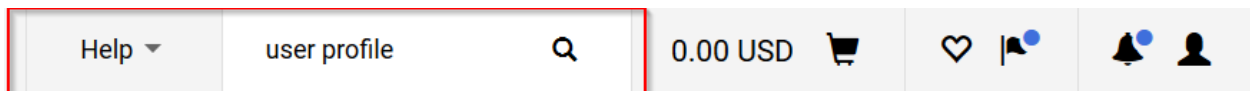
- November 12, 2020
- November 19, 2020
- December 3, 2020
- December 17, 2020
- January 7, 2021
- January 21, 2021
- February 4, 2021
- February 25, 2021
- March 11, 2021

The Maintenance Release document will be updated only when there are changes affecting customers in a Maintenance Release. If there are no updates affecting customers, a new version of the document is not created.

Online Help

The Online Searchable Help can be used a number of ways, including browsing through topics, performing a search, or using the index feature. Read the information below to learn more about the functionality and tools available with Help.

To access the online help, users select the search icon in the upper right navigation, select Help from the drop-down list, and enter a search term.



Administrators can also access the searchable help by navigating to the **Online Searchable Help** widget on the **Admin Home** page (**Administer > Administration**) and selecting to search or **Browse the Table of Contents**. Printed Handbooks are available in the **Printed Handbooks** widget.

Basics

Links in Help

Links to additional topics and external documents and websites are indicated by blue underlined text, as shown below:

Hyperlinks within text:

Hyperlinks can be selected to navigate to another topic in online help.

Select a link below to learn more...

[Overview](#)

[Login and Navigation](#)

See [Supplier Management: Dynamic Qualification](#) for additional information.



Drop-down and Expanding Text:

Many topics contain drop-down text where you can click on the arrow to view more information on the topic. Use the collapse all and expand all toolbar icons to view or not view this information.

Navigating the help

- Table of contents**
- Searching for a topic**
- The topic toolbar**

Browsing through the Table of Contents

To search for a topic from the Table of Contents, click on a topic in the left pane. The blue books () indicate additional topics "below" and can be selected to view the contents. Click on the page icon () to open a topic. To collapse a book, simply click on book icon again.

Searching for a Topic

To search for information, enter a term in the search bar select the Search bar (



). Enter the keyword or

keywords, then click the Search icon. The results display in the main screen section. Search results include the topic name and the first few sentences of the topic text. Click on the blue link to access the topic.

Your search for "Online help" returned 13 result(s).

[Using Help](#)

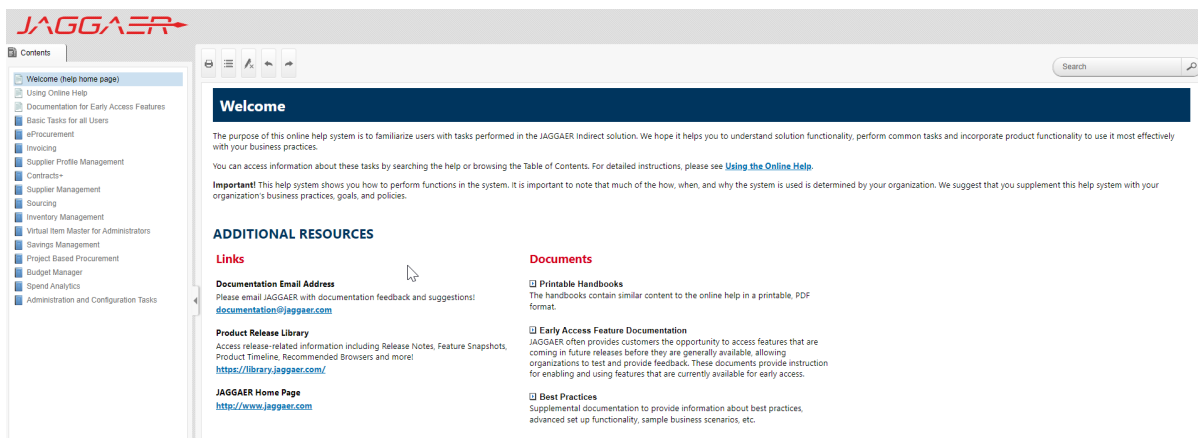
Using the Searchable Help The Online Searchable Help can be used a number of ways, including browsing through topics, performing a search, or using the index feature. Read the information below to learn more about the functionality and tools available with Help. Basics Links in Help Links to ...

[Welcome \(help home page\)](#)

Welcome The purpose of this online help system is to familiarize users with tasks performed in the JAGGAER Advantage solution. We hope it will help you: Understand the available functionality in the solution. Perform common tasks associated with day-to-day usage of the solution Make informed ...

The Topic Toolbar







A number of icons are available at the top of the Help screen that allows you to perform tasks related to the topic displayed.



The screenshot shows the JAGGAER online help interface. On the left, there is a 'Contents' pane with a tree view. The 'Welcome (help home page)' item is selected and highlighted in blue. The main content area has a dark blue header with the word 'Welcome' in white. Below the header, there is a paragraph of text explaining the purpose of the help system. Underneath, there is an 'Important!' note. At the bottom of the main content area, there are two columns of 'ADDITIONAL RESOURCES'. The 'Links' column contains a 'Documentation Email Address' section with an email address and a 'Product Release Library' section with a URL. The 'Documents' column contains three sections: 'Printable Handbooks', 'Early Access Feature Documentation', and 'Best Practices', each with a brief description.

Each of the topic toolbar icons is detailed below:

In addition to the Search field, the following options are available on the topic toolbar:

-  **Print** - Click to print the topic that is open. A Print dialog opens where you can select print options and send the topic to a printer.
-  **Expand All** - Click to expand all elements such as togglers, drop-down effects, and expanding text effects in a topic (if they are not yet expanded).
-  **Collapse All** - Click to collapse all elements such as togglers, drop-down effects, and expanding text effects in a topic (if they are expanded).
-  **Add or Remove Highlights** - After a user performs a search for a topic and opens it, the search text found in the topic are highlighted. This button works as a toggle to turn the highlights on or off.
-  **Back** - Click to open the topic that was viewed previously in the sequence.
-  **Forward** - Click to open the next topic in the sequence.

General

This section provides information about features related to basics and administration across the following JAGGAER One solutions:

- eProcurement
- Invoicing
- Supplier Management
- Contracts+
- Sourcing
- Spend Analytics
- Savings Management
- Inventory Management
- JAGGAER ONE Supplier Network

Important! Solution-specific Release Notes are available in each section of this document.

None

eProcurement

The features listed in this section apply to the JAGGAER ONE eProcurement solution.

Updates as of January 21, 2021

Business Analytics Enhancements

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In a previous release, we added address information to the Requisition, Purchase Order and Invoice Spend Explore options in the Test environment. In this release they have been made available in the Production environment. In addition, a new **Commodity Code Description** dimension has been added to PR , PO and Invoice Spend Explores and **Invoice Workflow Status** has been added to the Accrual Explore and made a default filter.

Customer Impact

- Related Solutions: eProcurement, Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

- We have added the following PO AP Statuses to the PO-Spend Explore in the **Production** environment:
 - Partial Payment Made
 - Complete
 - Expired Without Payment
- Address information has been added to the following Business Analytics Dashboard **Explore** features in the **Production** environment:

Ship To Address

- The Address Name and Address Code dimensions have been added to the Requisition, PO and Invoice Spend Explores.

Bill To Address

- The Address Name and Address Code dimensions have been added to the Requisition, PO and Invoice Spend Explores.

Remittance Address

- The Address Name, Address ID, and Address 3rd Party ID dimensions have been added to the Invoice Spend Explore.
- A new **Commodity Code Description** dimension has been added to PR , PO and Invoice Spend Explores.
- **Invoice Workflow Status** has been added to the Accrual Explore and made a default filter.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of December 17, 2020

Business Analytics Enhancements

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In this release we have added new PO AP Statuses to the PO-Spend Explore so that customers can filter PO spend by AP Status, i.e., "Complete". In addition, address information will be added to the Requisition, Purchase Order and Invoice Spend Explore options in the Test environment only for this release. They will be made available in the Production environment in January 2021.

Customer Impact

- Related Solutions: eProcurement, Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

- We have added the following PO AP Statuses to the PO-Spend Explore:
 - Partial Payment Made
 - Complete
 - Expired Without Payment
- Address information has been added to the following Business Analytics Dashboard **Explore** features in the Test environment:

Important Note: These will be available in the Test environment (UIT) only with this release. They will be made available in the Production environment in January 2021.

Ship To Address

- The Address Name and Address Code dimensions have been added to the Requisition, PO and Invoice Spend Explores.

Bill To Address

- The Address Name and Address Code dimensions have been added to the Requisition, PO and Invoice Spend Explores.

Remittance Address

- The Address Name, Address ID, and Address 3rd Party ID dimensions have been added to the Invoice Spend Explore.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of December 3, 2020

Delivery Lead Time Added to Exports

The Estimated Delivery Date feature has been added in recent releases for catalog and contract non-catalog items. The feature includes a Delivery Lead Time field that allows suppliers to provide a lead time (in days) for the delivery of specific items. When a purchase order is created the system will add the delivery lead time to the PO creation date to calculate an estimated delivery date for an item so that buyers know when to expect delivery.

In this release, logic has been updated for PR and PO XML exports and in the PR, PO and Cart return messages to include the Delivery Lead Time (in days).

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

Logic has been updated for PR and PO XML exports and in the PR, PO and Cart return messages to include **Delivery Lead Time (in days)**. The existing "LeadTimeDays" element (which is already available in all three exports) will now return DeliveryLeadTime using the following rules:

- If DeliveryLeadTime is has been populated by the supplier for a given product, it will be used instead of the current LeadTime value.
- If DeliveryLeadTime is not populated, LeadTime will be used.
- This functionality will work for both cXML and SAP cart return messages.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Business Analytics Dashboards

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data solution that is run within JAGGAER ONE.

In this release we have added new **Purchase Order Accruals** and **Receipt Accrual Process** dashboards:

- The **Purchase Order Accruals** dashboard shows the amount and quantity of orders that have not yet been fully received, along with the remaining balances.
- The **Receipt Accrual Process** dashboard provides receipt workflow information for receipts that were submitted into workflow within the specified time.

Customer Impact


- Related Solutions: eProcurement, Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

The following dashboards have been added to the **Global** menu. They can be viewed as is, or they can be used as a starting point to explore an organization's data and create dashboards and looks.

1. Navigate to **Reporting**  > **Operational and Site Usage Reports > Business Analytics Dashboards**.
2. Expand the **Global** menu near the top right corner of the page and select one of these dashboards:
 - The **Purchase Order Accruals** dashboard shows the amount and quantity of orders that have not yet been fully received, along with the remaining balances. It shows totals for number of PO lines, the sum of cost receipts, the number of PO lines with no receipts or no invoices, and PO lines with partial receipts.
 - The **Receipt Accrual Process** dashboard provides receipt workflow information for receipts that were submitted into workflow within the specified time. It shows the total number of receipts, the average cycle time, the average approval time, the number of approvers, the number of approvers taking longer than average to approve, and the percentage of receipts completing the approval workflow in one day.

It includes summary reports for: Cycle Time by Number of Receipts and Cycle Time by Receipt Source, and Approval Time by Top Approvers, by Longest Duration Approvers, by Action, and by Workflow Steps.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Invoicing

The features listed in this section apply to the JAGGAER ONE Invoicing solution.

Updates as of February 25, 2021

Global Invoicing - Invoice Declarations

For companies with Global Invoicing, the EU's Late Payment Directive (2011/7/EU) requires that when a payment is late, all companies within the EU are entitled to €40 minimum to cover recovery costs. This declaration must appear in the eInvoice PDF. To meet this requirement, we have added a new **Declarations** field to buyer invoices and supplier profiles. For suppliers, the field can also be used to include diverse legal and commercial conditions in their invoice, in accordance with local laws.


Customer Impact

- Related Solutions: Invoicing
- Feature Activation: For organizations with Global Invoicing, 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 this feature is enabled for an organization, the **Declarations** field is displayed as a read-only field on buyer invoices and credit memos. It shows text from the **eInvoice Declarations** field on the supplier's profile.


Administrator Impact

- To enable this feature, the **Declarations** Global Invoicing field must be added to the active buyer invoice document configuration, and **Invoice Declarations** field must be enabled for supplier registration, as follows:
 1. Add the **Declarations** Global Invoicing field to the buyer invoice document configuration:
 - a. Navigate to **Setup**  > **Configure Documents** > **Configure Buyer Invoice Document**.
 - b. Open the **Draft** copy of the active buyer invoice document configuration and click on the **Layout Details** tab.
 - c. Locate the **Declarations** field in the **Global Invoicing Fields** section and add it to the document layout.
 - d. Save changes.
 - e. Define how the field appears for each global invoicing country by completing settings in the **Supplier Country Specific Configuration** section. See **Global Invoicing: Configure Buyer Invoice Document** in the online searchable help for more information on these global invoice settings.



Note: In the Country Configuration settings, if the PDF/XML Field Name field is left to the default setting (i.e., blank), the Declarations field will be translated in the language associated with the invoice. If the default value is overridden in this field, it will not be translated.

The field will be displayed in English until the 21.1 production release. Prior to that time, administrators can change the wording to a different language manually in Field Management
 - f. Finalize and activate the buyer invoice document configuration.
 2. Configure the field on **Supplier Registration** pages to make the field visible to suppliers when they register:

Entity Registration

- a. Navigate to **Suppliers**  > **Configuration Settings > Registration Configuration > Entity Registration**.
- b. Expand the **Company Overview > Company Information** section.
- c. Select **eInvoice Declarations** on the left and complete the appropriate registration fields in the right panel.

Individual Registration

- a. Navigate to **Suppliers**  > **Configuration Settings > Registration Configuration > Individual Registration**
 - b. Expand the **Individual Overview > Individual Information** section.
 - c. Select **eInvoice Declarations** on the left and complete the appropriate registration fields in the right panel.
3. (optional) Suppliers will typically complete the eInvoice Declarations field on their profile, but it is also possible for customers to complete the field on behalf of a supplier, as follows:
- a. Navigate to **Suppliers**  > **Manage a Supplier > Search for a Supplier**.
 - b. Search for and open the supplier profile to update.
 - c. In left menu, expand **About** section and select **General**.
 - d. In the **eInvoice Declarations** field, enter the text that will appear on eInvoices submitted by the supplier. The text entered here will be displayed in the Declarations field on the eInvoice PDF.
 - e. Save changes.
- Once configuration is complete, the **Declarations** field is displayed as a read-only field on buyer invoices and credit memos. It shows the value from the eInvoice Declarations field on the supplier profile.
 - On the eInvoice PDF, the **Declarations** field is only displayed if it contains text. If the field is empty on the buyer invoice, the field is not displayed on the eInvoice PDF.

Third-Party Integration Impact

- In the 21.1 release, the **Declarations** Global Invoicing field will be added to the buyer Invoice XML export. Please check the 21.1 release notes when they are available for more information about this change.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

- If a Global Invoicing customer has configured the Declarations field on their buyer invoice document configuration and enabled the eInvoice Declaration field for supplier registrations:
 - The **eInvoice Declarations** field is displayed on supplier profiles. Suppliers can use it to enter legal and commercial conditions in accordance with local laws, for example, the EU's Late Payment Directive.
 - The **Declarations** field is displayed on buyer invoices and shows the text from **eInvoice Declaration** field on the supplier's profile.
 - The **Declarations** field is displayed on the eInvoice PDF only if it contains text. If the field is empty on the buyer invoice, the field is not displayed on the eInvoice PDF.

Global Invoicing - Tax Summary Table Added to eInvoice PDF

For organizations with Global Invoicing, legislation in France and other countries requires that a tax summary be posted at the end of an invoice. To meet this requirement, we have added new **Tax Rate Summary** table to the end of the eInvoice PDF. It shows a summary of the tax amounts per rate.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: For organizations with Global Invoicing, this feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- For organizations with Global Invoicing, a **Tax Rate Summary** table is displayed at the bottom of the eInvoice PDF for all countries. It shows tax amounts based on their tax rate percentage in four columns:
 - **Tax Concept** - Identifies the type of tax (i.e., Tax 1, Tax 2, Shipping Tax, Handling Tax).
 - **Tax Rate** - Shows all tax rates applied in any lines on the invoice.
 - **Taxable Amount** - Shows the sum of the taxable amount (i.e., the extended price) from all lines for each tax rate/tax concept listed.
 - **Total Tax** - Shows the total tax for each tax rate listed (i.e., all subtotals added from each line with that particular tax rate/tax concept).

Tax Concept	Tax Rate	Taxable Amount	Total Tax
Tax 1	16.000 %	3,000.00 USD	480.00 USD
Tax 2	16.000 %	1,000.00 USD	160.00 USD
Shipping Tax	8.000 %	80.00 USD	6.40 USD
Handling Tax	9.000 %	200.00 USD	18.00 USD

- Currency in the Tax Rate Summary table is displayed as follows:
 - By default the **Taxable Amount** and **Total Tax** fields are displayed in local currency, based on invoice document's currency.
 - If the currency on the document and the buyer tax currency associated with billing address are different, both currencies are displayed in the **Taxable Amount** and **Total Tax** columns. The document currency is listed, followed by the billing address currency (e.g., 600.00 USD (493.73 EUR)). The exchange rate is based on the value in the **Tax Declaration in Buyer Currency** field located in the DTSH section of the invoice.

Administrator Impact

- For customers with Global Invoicing, a **Tax Rate Summary** table is displayed at the bottom of the eInvoice PDF for all countries. It shows tax amounts based on their tax rate percentage.
- For each column header on the **Tax Rate Summary** table, a new system field has been added to the buyer invoice document configuration.
 - The system fields are **Tax Concept (PDF)**, **Tax Rate (PDF)**, **Taxable Amount (PDF)**, **Total Tax (PDF)**.
 - The fields are displayed on the eInvoice PDF only, they are not displayed in application. The fields will ALWAYS be displayed on the eInvoice PDF unless no taxes are applied to the invoice. Their visibility is consistent with other PDF-only fields such as Document Title and Self-Billed.
 - The fields allow for Country Configuration so that users can change labels based on local languages. See **Configure Buyer Invoice Document** in the online searchable help for more information.
 - We highly recommend that the fields be set up and configured within the Discount, Tax, Shipping & Handling section of the buyer invoice document configuration.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- For customers with Global Invoicing, a **Tax Rate Summary** table is displayed at the bottom of the eInvoice PDF for all countries. It shows tax amounts based on their tax rate percentage.

Global Invoicing - Updates to French Payment Terms on eInvoice PDF

For organizations with Global Invoicing, when a supplier is located in France and there are no early payment discounts on an invoice, the text "Escompte néant" ("No Prompt Payment Discount") must appear on the eInvoice PDF. This requirement applies to any French business carrying out transactions in France as well as to foreign companies that are VAT registered in France. To meet this Global Invoicing regulation, we have updated the payment term settings on invoices to display the French phrase for "No Prompt Payment Discount" if an invoice has a French supplier and there are no early payment discounts.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: For organizations with Global Invoicing, this feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- On invoices and credit memos where the Remit To address country is France, and the Payment Term Discount value is 0 or blank, payment terms will display the text "Escompte néant" ("No Prompt Payment Discount").
- This setting applies to PO and non-PO invoices and credit memos.

Administrator Impact

- On invoices where the supplier is French and there is no early payment discount, payment terms will display the text "Escompte néant" ("No Prompt Payment Discount").

Note: The phrase will be displayed in English until the 21.1 production release. Prior to that time, administrators can change the wording to French manually in Field Management.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Global Invoicing - Credit Reason Field Added to eInvoice PDF

For some organizations with Global Invoicing, suppliers must enter the reason for a credit on credit memos, and this data must be displayed on the eInvoice PDF for buyers. In an earlier release we made the Credit Reason field available to suppliers, but it was not available on the cXML invoice import. In this release we have added the Credit Reason field to the cXML invoice import so that credit reason values will be imported on cXML invoices.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: For organizations with Global Invoicing, this feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

For invoices/credit memos imported via cXML, the Credit Reason field can now be included in the import.

Third-Party Integration Impact

The cXML invoice import has been updated to include the Credit Reason field value.

Supplier Impact

This feature does not impact suppliers.

Updates as of January 21, 2021

Business Analytics Enhancements

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In this release we have added address information to the Requisition, Purchase Order and Invoice Spend Explore options in the Production environment. In addition, a new **Commodity Code Description** dimension has been added to PR , PO and Invoice Spend Explores and **Invoice Workflow Status** has been added to the Accrual Explore and made a default filter. See [Business Analytics Enhancements](#) in the **eProcurement** section for more information.

Updates as of December 17, 2020

Business Analytics Enhancements

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In this release we have added address information to the Requisition, Purchase Order and Invoice Spend Explore options and added new PO AP Statuses to the PO-Spend Explore so that customers can filter PO

spend by AP Status, i.e., "Complete". We have also added a **Commodity Code Description** dimension to the PR , PO and Invoice Spend Explores and an **Invoice Workflow Status** has been added to the Accrual explore and made a default filter. See [Business Analytics Enhancements](#) in the **eProcurement** section for more information.

Updates as of December 3, 2020

Global Invoicing - Credit Reason Field Updated

In order for Global Invoicing customers to meet legal compliance requirements, suppliers must enter the reason for a credit on credit memos, and this data must be displayed on the eInvoice PDF for buyers. Previously, JAGGAER had a Credit Reason field available for invoices on the buyer side, but it was not available to suppliers. In this release we have made the Credit Reason field available to suppliers so that they can enter this information on credit memos, and we have also updated settings so that the Credit Reason information is displayed on the eInvoice PDF.



Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

For Global Invoicing customers only, the **Credit Reason** field is displayed on the eInvoicing PDF, beneath the credit memo name. It shows the Credit Reason value that has been selected by the supplier.

Administrator Impact

- For Global Invoicing customers, the **Credit Reason** field is now displayed on sales invoice credit memos to suppliers in the portal. Suppliers can complete the field by selecting an option from the drop-down list, and the Credit Reason selected by the supplier carries over to buyer side when credit memo is sent to buyer.
- The Credit Reason field allows for Country Configuration on the buyer side as follows. See **Configure Buyer Invoice Document** in the online searchable help for more information:
 1. Navigate to **Setup**  > **Configure Documents** > **Configure Buyer Invoice Document**.
 2. Open the **Draft** version of the Buyer Credit Memo Configuration document.
 3. Click the **Layout Details** tab.
 4. Open the panel where the field that you want to configure is located and select the **Credit Reason** field.
 5. Choose the visibility and country configuration settings for the field and save changes.
 6. Finalize and activate the document configuration.
- The **Credit Reason** drop down list options that are available for selection must be configured via Field Management:
 1. Navigate to **Setup**  > **Field Management** > **Manage Field Names and Help Text**.
 2. Search for and open the **Credit Reason** field that is associated with the new invoice experience view.
 3. In the right panel, find the **Associated List** section and click **view/edit list values**.
 4. Add or edit the drop-down list values and save the changes.

Third-Party Integration Impact

- The **Credit Reason** field as completed by suppliers is now displayed on the eInvoice PDF for credit memos, to meet Global Invoicing legal compliance requirements.

- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

- For Global Invoicing customers, a new **Credit Reason** field is now displayed on sales invoice credit memos. Suppliers can complete the field on the sales invoice in the portal by selecting an option from the drop-down list, and the Credit Reason selected by the supplier carries over to buyer side when the credit memo is sent to buyer.
- Administrators for the customer organization need to configure the drop-down options that are available for selection in the field.

OCR Invoice XML Import Identification Updated

Previously, the JAGGAER OCR invoice XML import used only the “supplierName” or “SupplierNumber” values to identify the supplier on an invoice. Other values, such as the Federal ID or VAT Registration Number fields, could not be used to identify the supplier. This created a gap for the SdI (Italian Tax Authority’s eInvoicing platform) integration flow and also for other clearance country integrations. With this release, the OCR invoice XML import has been updated so the FederalId and VATRegistrationNumber values can also be used to identify the supplier on an invoice.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

This feature provides a more accurate identification of suppliers on OCR and DMR Invoice import for Global Invoicing customers.

Third-Party Integration Impact

- Supplier identification on OCR invoice XML import has been updated so the FederalId and VATRegistrationNumber values can be used to identify the supplier on an invoice. It works as follows:
 - If a **Supplier Number** is provided, this value is used to populate supplier information on the invoice and the system does not check the other fields.
 - If a supplier number is not provided, the system will first check for **Federal ID**, then for **VAT Registration Number**, and finally for **Supplier Name** values. If one of these values is provided, the system will use it to pull in the appropriate supplier information for the invoice.
 - If no supplier information is available or if the values do not match, the invoice will be imported with a one-time supplier, which follows the current logic for suppliers who cannot be identified.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

OCR-DMR Invoice Validation Updated

Previously, on the Simple Manual Entry screen for incoming DMR invoices in a pseudo draft state, the system would validate using Submit validation rules instead of workflow validation. When the Submit validation signaled an error, it would require manual intervention to review the error and submit the invoice on a different tab. This meant customers no longer enjoyed the benefit of DMR invoices as a “touchless invoice.”

In this release, a change was made so that Simple Manual Entry now will not use Submit validation if an invoice is in an OCR/DMR pseudo draft state. In this case, it will use Workflow validation, as other tabs do.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

Users will not have to review submission errors on the Simple Manual Entry screen for OCR/DMR invoices that should not be validated based on Submit rules.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Business Analytics Dashboards

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data solution that is run within JAGGAER ONE.

In this release we have added new **Purchase Order Accruals** and **Receipt Accrual Process** dashboards:

- The **Purchase Order Accruals** dashboard shows the amount and quantity of orders that have not yet been fully received, along with the remaining balances.
- The **Receipt Accrual Process** dashboard provides receipt workflow information for receipts that were submitted into workflow within the specified time.

See [New Business Analytics Dashboards](#) in the **eProcurement** section for more information.

Updates as of November 19, 2020

DMR Tax Default Settings Updated

Previously, non-PO lines on DMR invoices did not acquire the "Taxable" settings configured by an organization for invoices. This is the checkbox that indicates whether a line item is taxable. In this release, the default "Taxable" settings for DMR invoices has been updated. Now, non-PO lines on DMR invoices will follow "Taxable" settings on either the fulfillment center's setting OR business unit setting (if there is no fulfillment center), or the organization setting if neither is provided. This aligns with the functionality that is has always been available for manual invoices.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None


User Impact

Non-PO lines on DMR invoices will acquire the "Taxable" settings from either the fulfillment center's setting OR business unit setting (if there is no fulfillment center), or the organization setting if neither is provided.


Administrator Impact

The default "Taxable" settings for invoices can be configured for an organization in these locations:


Business Unit Default

1. Navigate to **Setup**  > **Organization Structure and Settings > Add/Manage Business Units**.
2. Select a **business unit** in the left menu.
3. Click the **Ordering** tab on the right.
4. Enable the **Mark items taxable by default** setting and save the changes.

Fulfillment Center Default

1. Navigate to **Suppliers**  > **Manage Suppliers > Search for a Supplier**, then search for and open a supplier profile.
2. Select **Contacts and Locations > Fulfillment Centers** in the left menu.
3. Select the **fulfillment center** to change in the Fulfillment Center column.
4. Click the **Ordering** tab on the right, then the **Tax** sub-tab.
5. Enable the **Mark items taxable by default** setting and save the changes.

Organization Default

1. Navigate to **Setup**  > **Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg. Tax, S&H, Payments)**.
2. Click the **Tax** tab.
3. Enable the **Mark items taxable by default** setting and save the changes.

Third-Party Integration Impact

The DMR has been updated to follow an organization's "Taxable" settings for non-PO items on DMR invoices.

Important! If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

Supplier Management

The features listed in this section apply to the JAGGAER ONE Supplier Management solution.

Updates as of February 25, 2021

eInvoice Declarations Field Available in Supplier Profile Registration Configuration

To support Global Invoicing customers, a new **eInvoice Declarations** field has been added to the Supplier Profile and available to configure in Supplier Registration. Please see [Global Invoicing - Invoice Declarations](#) for complete details.

Updates as of February 4, 2021

Ability to Assign a Stakeholder as Approver for Supplier Registration and Supplier Review Workflow

In a previous Maintenance Release, a new field was made available for the Supplier Profile in order to designate a **Stakeholder** for a supplier record. See [New Stakeholder Field Available in Supplier Profile](#) for details. With this Maintenance Release, the **Stakeholder** user can now be added as an approver in Supplier Registration and Supplier Review Workflow.

You must contact JAGGAER to add the **Stakeholder approval** step to the workflow process.

Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required.
- New Permissions related to this feature: None

- New Notifications related to this feature: None

User Impact

- If an organization has the **Stakeholder approval** step in Supplier Registration and/or Supplier Review Workflow, users who are listed as **Stakeholders** on a supplier profile will receive a notification when the supplier record passes through the configured workflow. The supplier will show in the user's **Supplier Registrations to Review** or **Supplier Reviews to Approve**, as appropriate. **Note:** Only users with the appropriate workflow approval permission will receive the notification and have the ability to approve the supplier in workflow.

Administrator Impact

- A new **Stakeholder approval** workflow step is available to be included in Supplier Registration and Supplier Review workflow processes.
- Administrators must contact JAGGAER to include the **Stakeholder approval** workflow step. No other workflow configuration is required, as the step will automatically assign the Stakeholder user as an approver.
- Administrators need to ensure that Stakeholder users are assigned on the supplier profile in order for the Workflow step to be triggered.

Important! Users assigned as Stakeholders should have appropriate Supplier Registration and/or Supplier Review Approval permissions in order to receive notifications and have the ability to approve the supplier in workflow.

- **Note:** If no Stakeholder is assigned in the supplier profile, the workflow step will be skipped.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of January 7, 2021

Supplier Fulfillment Center Custom Field Definition and Field Option Values Import and Export

In the 20.3 release, we added the ability for organizations to configure Fulfillment Center Custom Fields for selection on the Supplier Profile. With this release, a new Fulfillment Center Field Import/Export feature is available to allow validation and import of fulfillment center custom field definitions and field option values via an Excel file. A template and detailed instructions are available when navigating to this new menu option. The organization's Fulfillment Center Custom Field Definitions and Field Option Values can also be exported to an Excel file for reference or to update for import.


Customer Impact

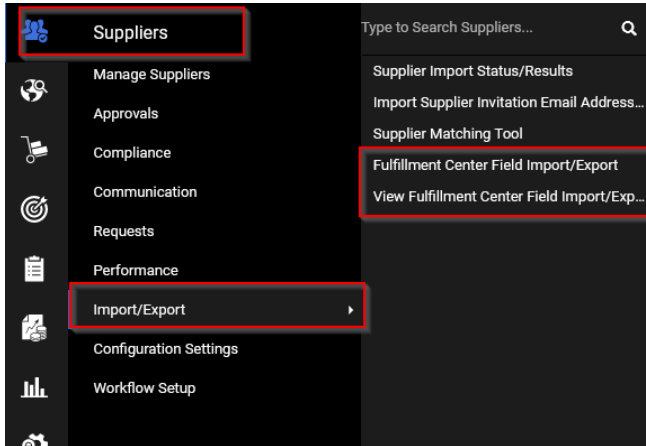
- Related Solutions: Supplier Management
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

- Administrators with **Fulfillment Center Custom Field Administration** permission (Permission Settings > Administration > Fulfillment Centers) will now see two new menu navigation options under **Suppliers**  > **Import/Export: Fulfillment Center Field Import/Export** and **View Fulfillment Center Import/Export Results**.



Fulfillment Center Field Import/Export

- When selected, an overlay displays that guides the user through the process of Exporting, Validating or Importing the organization's Fulfillment Center Custom Field Definitions and Field Option Values. A template and detailed instructions are available by selecting the appropriate link in the overlay.

- Once the validation or import has been submitted, results are displayed on the **View Fulfillment Center Import/Export Results** page.

View Fulfillment Center Import/Export Results

- This page displays the Export requests as well as the results of validation and import requests.

Status	File	Details	Requested By	Requested At	Expires In
Completed		Fulfillment Center Custom Field Excel Import Notes: New and updated values Completion Date: 12/14/2020 3:43 PM Total records: 18 Records validated/imported: 18 Records with warnings: 0 Records with errors/duplicates: 0 Click to import...	Triton Admin	12/14/2020 3:43 PM	No Expiration
Completed with Errors/Warnings	FC_CF Import Updates.xlsx_ErrorsAndWarnin gs_32483842.xlsx	Fulfillment Center Custom Field Excel Import Notes: importing new values Completion Date: 12/14/2020 3:33 PM Total records: 21 Records validated/imported: 19 Records with warnings: 0 Records with errors/duplicates: 2 Click to import...	Triton Admin	12/14/2020 3:33 PM	No Expiration
Completed	Fulfillment Center Custom Field Excel Export3 2483870.xlsx	Fulfillment Center Custom Field Excel Export Notes: Exporting FC Custom Fields Completion Date: 12/14/2020 1:44 PM Total records: 15	Triton Admin	12/14/2020 1:44 PM	No Expiration

- You can filter the export list by selecting the **Click to Filter** link:
 - Type - Choose to filter results by Import or Export requests.
 - Function - If Import is selected as the Type, you can choose a Function of Import of Validate requests.
 - Status - Select to see results with a specific status, such as all requests that have been completed.
 - Click **Apply** to filter the list by your selected options.
- Validate and Import requests display the number of rows processed, validated, imported, with warnings, and with errors/duplicates.
- If warnings or errors are detected, a file is provided for download. Open the file to review the warnings and errors. Warnings will not prevent a row from importing. Rows with errors will not import.
- Export requests display the total number of records.
- Sort results by Status, Requested By, Requested At (time/date), and Expiration.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Supplier Fulfillment Center Custom Data - UI Improvement for 50+ Selection Options

When editing **Supplier Profile Fulfillment Center Custom Data** fields with more than 50 options, a new type-ahead feature is now available that allows the user to search easily for the appropriate response. This functionality applies to **Supplier Profile Fulfillment Center Custom Data** fields using the **Drop-Down List** and **Multi-Choice (Pick One)** features. When working with applicable custom fields with 50 or less options, the standard UI is used.

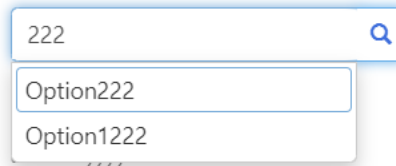
Customer Impact

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

User Impact

- Users will now see the ability to search for the appropriate response for a Supplier Fulfillment Center Custom Data field if more than 50 options are available for selection (for Drop-Down or Multi-Select (pick one) fields):
 1. In the Supplier Profile, navigate to the **Contacts and Locations > Fulfillment Centers > Custom Data** page.
 2. **Drop-down** or **Multi-Select (pick one)** fields will display with a search icon if more than 50 options are available. Click the Search icon or begin typing to see results that meet your criteria:

DropDownList02



222

- Option222
- Option1222

3. If the field has 50 or less options available, the UI is unchanged.
 - Drop-down fields will display with a drop-down arrow in order to scroll through a list to pick one.
 - Multi-select (pick one) fields will display all options as a radio-button selection.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of December 17, 2020

New Stakeholder Field Available in Supplier Profile


Many companies have localized buyer users who engage a supplier and invite them into the JAGGAER network. There was previously no way to identify this buyer except as a user who requested the supplier. With this release, a new **Stakeholder** field can be made available on the **General** page of the

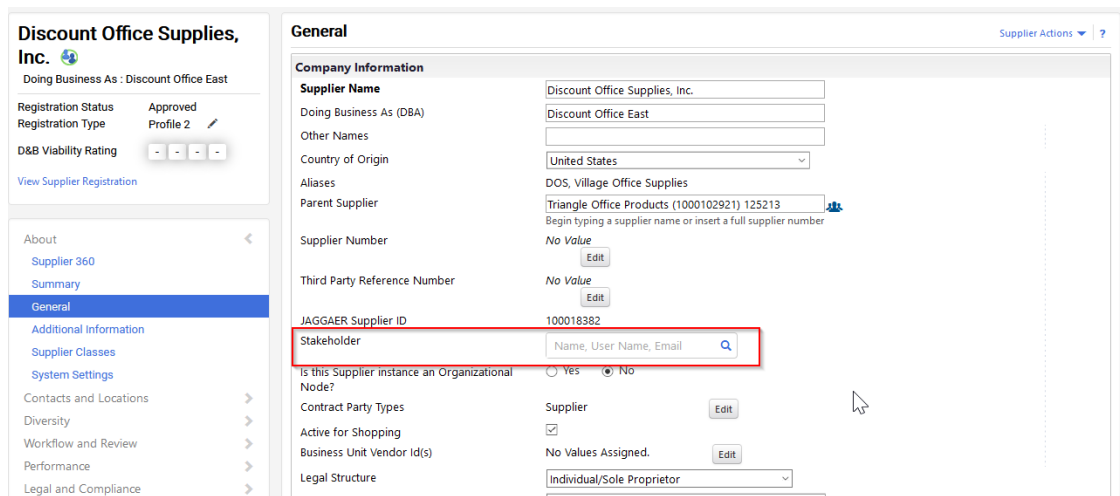
Supplier Profile to identify users who should be involved in the Supplier registration or review approval process. This field is informational only at this time. In a future release, this field will be leveraged in the Supplier Registration or Review Workflow process to allow for the stakeholder to have a role in reviewing required information for workflow approval.

Customer Impact


- Related Solutions: Supplier Management, Invoicing, Contracts+, Sourcing
- 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 enabled, a new **Stakeholder** field will display in the Supplier Profile (**Suppliers**  > **Manage Suppliers > Search for a Supplier > [selected supplier]: About > General page**)



The screenshot displays the 'General' page of a supplier profile for 'Discount Office Supplies, Inc.'. The page is divided into a left sidebar and a main content area. The sidebar contains navigation links: About, Supplier 360, Summary, General (highlighted), Additional Information, Supplier Classes, System Settings, Contacts and Locations, Diversity, Workflow and Review, Performance, and Legal and Compliance. The main content area is titled 'General' and contains various fields for company information. A red box highlights the 'Stakeholder' field, which is currently empty and has a search icon to its right. Below the 'Stakeholder' field is a radio button question: 'Is this Supplier instance an Organizational Node?' with 'Yes' and 'No' options, where 'No' is selected. Other fields include 'Supplier Name', 'Doing Business As (DBA)', 'Country of Origin', 'Aliases', 'Parent Supplier', 'Supplier Number', 'Third Party Reference Number', 'JAGGAER Supplier ID', 'Contract Party Types', 'Active for Shopping', 'Business Unit Vendor Id(s)', and 'Legal Structure'.

- Begin entering a user name or click the search icon  to see a list or search for users. Select the appropriate user.
- Only one user can be selected.

Administrator Impact

- Administrators must choose to make the **Stakeholder** field (internal field name **CMMSP_SISupplierStakeholder**) visible via Field Management. For Field Management instructions see **Field Management** in the **Administration and Configuration Handbook** or online searchable help.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Contracts+

The features listed in this section apply to the JAGGAER ONE Contracts+ solution.

Updates as of January 7, 2021


New UI for Custom Contract Fields with Over 50 Options

When editing Custom Contract Fields (CCFs) with more than 50 options, the UI for certain features will now change to make working with them easier. This new UI applies to CCFs using the Multi-Select (Pick Many), Drop-Down List, and Multi-Choice (Pick One) features. When working with applicable CCFs with fewer than 51 options, the standard UI is used.

Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- To use the new UI, perform the following procedure:
 1. Navigate to **Contracts**  **Libraries** > **Custom Fields**.
 2. In the CCF list, locate a CCF with over 50 options and click the corresponding **Edit** button.
 3. In the **Edit Custom Contract Field** window, the UI will change to accommodate the large number of options. Options will be listed within a sub-window divided into multiple pages. By default, five options will be listed per page. You may navigate through the pages using the arrow buttons or by searching for a specific option.

Edit Custom Contract Field

Field Name * [Add/Edit Translations](#)

Internal Name * over50

Response Type * Multiple Select (Pick Many)

Response Options * [Add option](#)

< > Page 1 of 11 1-5 of 52 Results 5 Per Page

Response Options	Language	
1	-	Actions
2	-	Actions
3	-	Actions
4	-	Actions
5	-	Actions

< > Page 1 of 11 1-5 of 52 Results 5 Per Page

Add Help Text Yes No

Show on Advanced Search Yes No

Active * Yes No

Show on Summary Show on Summary

* Required [Save](#) [Close](#)

- For CCFs with multiple options that have 50 or fewer options, the standard UI is used.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Sourcing

The features listed in this section apply to the JAGGAER ONE Sourcing solution.

Updates as of December 17, 2020

Ability to Disable Follow-Up Questions on Public Postings

When a public post is created in an event Q&A Board, suppliers can respond to it. However, suppliers may be unaware that their responses are posted publicly. To prevent these misunderstandings while continuing to provide customers an outlet for posting public notices to suppliers, with this release, a new setting has been added to the Post a Question overlay which enables customers to disable supplier responses to the posting.

Customer Impact

- Related Solutions: Sourcing
- Feature Activation: This feature is **AVAILABLE** by default. The setting is **OFF** (disabled) by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- When buyers post a question in an event Q&A Board, a new checkbox called **Supplier Response Disabled** appears on the Post a Question overlay:

- When this checkbox is selected, the **Ask a Follow-Up Question** button is hidden on the supplier interface.
- To access the Post a Question Overlay:
 1. Access the Q&A Board area by navigating to **Tools > Q&A Board** within an active event.
 2. Expand the **Submit Question** drop-down and select **Post a Question**.

Administrator Impact

This feature does not impact administrators.

Third-party Integration Impact

This feature does not impact integration.

Supplier Impact

When the **Supplier Response Disable** checkbox is selected for a public post, the **Ask a Follow-Up Question** button does not appear on the supplier Question & Answer Board user interface for that posting.

Spend Analytics

The features listed in this section apply to the JAGGAER ONE Spend Analytics solution.

None

Savings Management

The features listed in this section apply to the JAGGAER ONE Savings Management solution.

None

Inventory Management

The features listed in this section apply to the JAGGAER ONE Inventory Management solution.

None

JAGGAER ONE Supplier Network

The features listed in this section apply to the JAGGAER ONE Supplier Network, the solution that suppliers use to access the system.

Updates as of February 25, 2021

Supplier Profile - New eInvoice Declarations Field for Global Invoicing Customers

For buyers with Global Invoicing, the EU's Late Payment Directive (2011/7/EU) requires that when a payment is late, all companies within the EU are entitled to €40 minimum to cover recovery costs. This declaration must appear in the eInvoice PDF. To meet this requirement, buyers can configure a new **eInvoice Declarations** field for the supplier's Registration Profile. The field can also be used to include diverse legal and commercial conditions in the invoice, in accordance with local laws.

Please see [Global Invoicing - Invoice Declarations](#) for additional details.

Supplier Impact

- Related Solutions: Suppliers with Global Invoicing Customer Relationships
- Feature Activation: This feature is **OFF** by default and must be configured by the customer.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

Customer Branded Portal - Registration Profile

- The Customer Registration Profile Form may contain a new **eInvoice Declarations** field if configured by the customer. Enter legal and commercial conditions in accordance with local laws, for example, the EU's Late Payment Directive.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Customer Impact

- This feature applies to Global Invoicing customers only. Customers must configure the **eInvoice Declarations** field on the Registration Profile Form.
- If **eInvoice Declaration** information is provided in the supplier profile, the customer's invoice and **eInvoice PDF** will display the provided **Declarations** information.

Updates as of December 3, 2020

Ability to Enter Credit Reason for Global Invoicing Customers

When a supplier issues a credit to a Global Invoicing customer, the customer may request that the supplier provide a reason for the credit in depending on a country's legal compliance requirements. Previously only customers could enter a Credit Reason on a buyer-side invoice. With this release, suppliers can now select a **Credit Reason** when completing a Sales Invoice in the Supplier Portal. The **Credit Reason** options are configured by each customer based on the Remit To country selection.

Please see [Global Invoicing - Credit Reason Field Updated](#) for additional details.

Supplier Impact

- Related Solutions: Suppliers with Global Invoicing Customer Relationships
- Feature Activation: This feature is **OFF** by default and must be configured by the customer.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- Users completing a Sales Invoice for a Global Invoicing customer may see a new field for **Credit Reason** in the **General Information** section (if configured by the customer for the selected Remit To country):

The screenshot shows a 'General Information' window with the following fields and values:

Credit Memo Info	
Create Date	12/2/2020
Credit Memo Number	
RMA No.	
Credit Memo Date	12/2/2020
Supplier	Discount Office Supplies, Inc.
Customer	Widget Corporation
Credited By	Sheri Hester
Invoice Owner	Brynn Wilson

Order Info	
PO Number	2323261
Sales Order Number	1406082

Regulatory Information	
Invoice Name	2020-10-05_billson_01
Credit Reason	Over Invoiced
Payment Terms	Returned Item

- The **Credit Reason** field and selections display, and may be required or optional, depending on the customer's country configurations.
- The **Credit Reason** is carried over to the buyer side when the credit memo is sent to the buyer.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Customer Impact

- This feature applies to Global Invoicing customers only. Customers must configure the appropriate Credit Reason selections based on the Remit To Country.