JAGGAER Standard Services

Professional Services Configuration Information

JAGGAER Standard Professional Services are ideal for customers looking for a balanced speed-to-value implementation. JAGGAER will focus efforts on key functional areas while allowing customers some flexibility to fine-tune our Industry-Leading JAGGAER Common Commercial Practices. JAGGAER will provide application education, consulting, and testing support at key points in the project to ensure customers realize value out of the solution in an accelerated timeline.

The scope below represents the configurations JAGGAER will make as part of this project for implementation and training purposes as referenced in the Client's Statement of Work. The scope of services described below for each configuration are based on industry leading JAGGAER common commercial practices to meet Client requirements. The configurations included in this scope are also used to educate the Client on application configuration options.

Functionally, many of these configurations are unlimited and the Client may make further adjustments to as many configurations as the application allows.

For all workflow steps mentioned below, JAGGAER to configure up to five business rules, per step.

Please note that certain functional components will not be reviewed during a JAGGAER Standard Services implementation effort. Should Client choose to implement one of these after the project concludes, Client may use additional resources available through JAGGAER University or on-line help. If Client requires additional consulting services to assist with the configuration, please contact your JAGGAER Account Manager. Click here to see the full list of items not covered during a JAGGAER Standard Services Implementation effort.

JAGGAER One Modules	
Indirect	**Direct**
Contracts+ eProcurement Inventory Invoicing Sourcing Sourcing+ Spend Analytics+ Supplier Catalog Enablement Supplier Management Supplier Management+ Supplier Performance Management+	Direct Advanced Shipping Notice (ASN) Direct Category Management Direct Supplier Quality Notifications (SQN) Direct Delivery Call-Offs Direct Document Management Direct Forecasting & Vendor Managed Inventory (VMI) Direct Long-Term Vendor Declaration (LTVD) Direct Purchase Order Management Direct Sourcing Direct Supplier Management Direct Supplier Performance Management Direct Tool Management

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Indirect Modules

Contracts+

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Repository

Contract Types	Configure up to six (6) contract types
Custom Fields	Configure up to fifteen (15) custom fields and ten (10) values per custom field
Contract Request Template	Configure one (1) contract request template, with up to ten (10) custom fields and ten (10) values per custom field
Contract Template	Configure one (1) contract template, with up to ten (10) custom fields and ten (10) values per custom field
Work Groups	Configure up to six (6) single-level work groups
User Roles	Configure up to four (4) standard contract user roles, including: contract manager, stakeholder, approver, and contract administrator
Obligations	Configure up to one (1) obligation within the library
Dashboards	Review standard dashboard configuration

Workflow

Contract Request	Enable standard single-step approval workflow to manage contract requests
Contract Approval	Configure up to three (3) workflow steps to manage contract approvals

Authoring

Main Document Templates (Static)	Configure up to two (2) simple (static) templates up to fifteen (15) pages in length each. Configuration to include: creating the template header record, uploading the MS Word document, and inserting document placeholders
External Review	Enable and review the process for performing External Reviews

eSignature

DocuSign	Configure standard JAGGAER DocuSign connection and three (3) required workflow steps
Adobe Sign	Configure standard JAGGAER Adobe Sign connection and three (3) required workflow steps

Primary Data Load

Suppliers	Perform a one-time load of up to 5,000 suppliers in Client's Production site and up to fifty (50) in Client's Test site

Contracts	Perform an iterative load of up to 5,000 contracts and 25,000 attachments in Clients' Production site and a subset in Client's Test site. Client will collaborate with JAGGAER to resolve load errors

With the Standard Implementation offering, the Client is responsible for the following data loads:

Users	Perform a one-time load of users in Client's Production site and a subset in Client's Test site

eProcurement

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Shopping

Shopping	Configure the solution to enable shopping for goods and services including configuration of the standard Purchasing Showcase dashboard
Branding	Configure initial site branding including color theme, client logo, site name, Login URL, and organization message
General Settings	Configure general application and shopping settings
Catalogs (punch-out, hosted)	Up to six (6) Supplier Catalogs
Accounting Custom Fields	Match Client's accounting element segments
PR/PO Custom Fields	Configure up to ten (10) custom fields for PR/PO
Forms	Activate up to four (4) standard forms (no request templates, no quick quote, no vendor request), with one (1) associated step of one (1) approval workflow. Four (4) Standard Forms include: • Vendor Request • Non-Catalog • Quick Quote • [Check Request]
User Roles	Configure up to five (5) standard roles related to eProcurement: Shopper, Requestor, Approver, Buyer, and System Administrator

Requisition Approvals

Purchasing Documents	Configure one (1) Purchase Requisition document based on best practices and Client input
Approvals	Configure the solution to enable purchase requisition and purchase order approval and notification processing through workflow
Workflow	Configure the five (5)-step eProcurement workflow associated with requisition approvals and educate customer how to manage approval updates. Workflow steps include: field value validations, financial hierarchy approvals, budget validation, commodity and item category approval, check request approval, purchasing review and approval, and an automated step to create PO

Order Delivery

Order Distribution	Configure the solution to enable order distribution through the appropriate channels for the Client (fax, email, manual, cXML, supplier portal delivery)
General Settings	Configure organization-wide settings for order distribution and educate client how to manage supplier-specific settings and manage order failures
Purchasing Documents	Configure one (1) Purchase Order document.
Supplier Portal	Configure the Supplier Portal to enable supplier registration, communication regarding purchase orders, and catalog price list submission. Configure initial branding, including color theme, logo and name, and messaging to suppliers

Contract Compliance Tracker

Contract Compliance	Configure the solution to enable contract compliance functionality
General Settings	JAGGAER to work with Client to configure contract shopping settings

Budget Manager

Budgets	Setup one (1) account code combination for budgetary configurations
Workflow	Configure up to two (2) workflow steps associated with the budget approval process. Configure up to two (2) workflow steps associated with the budget transfer process. Enable up to four (4) budget check workflow steps across the PR or Invoice workflows.
Notification Preferences	Configure the solution to enable notification processing through workflow
Roles	Configure up to four (4) user roles

Primary Data Load

Suppliers	JAGGAER will perform a one-time load of up to 500 suppliers, with key fields only, in Client's Production site and a subset in Client's Test site
Account Codes	JAGGAER will perform a one-time load of account codes in Client's Production site and a subset in Client's Test site
Commodity Codes	Standard UNSPSC taxonomy will be used

With a JAGGAER Standard Services Implementation engagement, the Client is responsible for the following data loads:

Users	Client will perform a one-time load of users in Client's Production site and a subset in Client's Test site
Contracts	Client will perform a one-time load up to 100 eProcurement / Shopping contracts in Client's Production site and a subset in Client's Test site, if implementing Contract Compliance Tracker functionality

Budgets	Client will perform a one-time load of budget data into the Client's Production site, if implementing Budget Manager functionality

Inventory

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Inventory

General Settings	JAGGAER to work with customer to configure Inventory settings
User Roles	Enable the two (2) standard user roles related to inventory management administration and stockroom management
Internal Stockroom	Configure one (1) internal stockroom / Fulfillment Center with preferred positioning, if desired by Client
Locations	Configure one (1) parent location for internal Fulfillment Center
Inventory Documents	Configure up to one (1) Sales Order Document, one (1) Pick List, or one (1) Packing Slip
Sales Order Workflow	Configure workflow for sales orders with a single workflow queue for review and approval
Dashboards	Review standard dashboard configuration

Primary Data Load

Items	Perform a one-time load of up to 200 items in Client's Production site and a subset in Client's Test site
Users	Perform a one-time load of users in Client's Production site and a subset in Client's Test site

Invoicing

For the application and applicable Functional Component(s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Receiving

Receipt creation	Configure the Solution to enable receiving (desktop and/or central)
General Settings	Configure general receiving settings to support Client requirements
Workflow	Configure up to two (2) workflow steps associated with receipt creation and transmission to the Client's ERP system, if applicable.
Receipt document	Configure receipt entry and available options

Invoice Creation

Invoicing	Configure the Solution to enable purchase order related invoices and non-PO invoice creation (if applicable), both manually and electronically (if applicable)
General Settings	Configure general invoicing settings to support Client requirements
Supplier Portal	Configure the Supplier Portal to enable supplier registration and communication regarding invoices. Configure initial branding, including color theme, logo and name, and messaging to suppliers

Email configuration	Configure up to two (2) emails sent to suppliers regarding registration and/or invoice communications
User Roles	Activate the four (4) standard roles related to invoice creation functionality: AP Professional, AP Manager, AP Admin, and Central Receiving
Custom Fields	Configure up to five (5) additional custom fields on Invoice document, inclusive of Account Segments
Updates to Purchase Order document layout	Update Purchase Order document layout modifications to accommodate invoice requirements, if required
Updates to Purchase Requisition document layout	Update Requisition document layout modifications to accommodate invoice requirements, if required
Invoice document layout	Configure one (1) invoice document to support Client invoice requirements
Credit Memo document layout	Configure credit memo document to support Client credit memo requirements
Forms	Configure one (1) standard check request form

Invoice Matching and Approvals

General Settings	Configure general invoice approvals and general matching settings to support Client requirements
Matching and Tolerances	Configure Advanced Dynamic Matching (ADM) for up to two (2) matching rules and educate Client on managing and updating ADM settings/rules
Workflow	Activate the five (5) step standard workflow/review steps (Non-PO, Sales Tax Check, Credit Memo, Hold for Receiving, and Matching exceptions) associated with invoice workflow. Educate customer on how workflow configuration is used to manage approval updates

Sourcing

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Events

Event Types	Configure up to two (2) event types (i.e. RFP or RFI)
Custom Fields	Configure up to three (3) custom fields and ten (10) values per custom field
Libraries	Configure one (1) event library with up to ten (10) elements (prerequisites, attachments, and questions)
Work Groups	Configure up to six (6) single-level work groups
User Roles	Enable the four (4) standard user roles and customize where needed: event manager, stakeholder, approver, and sourcing administrator
Sourcing Request Template	Configure up to one (1) sourcing request template with up to ten (3) custom fields
Evaluation Tools	Review of standard event evaluation tools
Supplier Portal	Provide initial configuration of the Supplier Portal including branding options such as logo, theme colors, and messaging to suppliers

Supplier Email Communications	Configure up to two (2) standard email communication templates
Dashboards	Review standard dashboard configuration

Workflow

Sourcing Request	Enable standard single-step approval workflow to manage sourcing requests
Sourcing Approval	Enable standard single-step approval workflow to manage sourcing approvals
Sourcing Evaluation	Configure up to three (3) workflow steps to manage sourcing evaluation process

Primary Data Load

Suppliers	Perform a one-time load of up to 5,000 suppliers in Client's Production site and up to fifty (50) in Client's Test site

With the Standard Implementation offering, the Client is responsible for the following data loads:

Users	Perform a one-time load of users in Client's Production site and a subset in Client's Test site

Sourcing+

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below

General Application settings

RFx setup	Configure up to two (2) RFx types (e.g. – RFP, RFI) – RFx Settings or Awarding, including ten (10) RFx custom fields; two (2) RFx templates
Project setup	Configure up to one (1) Project type; including ten (10) Project custom fields (up to ten (10) values if multi-value fields); and one (1) Project template
Divisions	Configure up to four (4) divisions
User Roles (buyer side)	Enable up to four (4) standard sourcing user roles (Super User, Buyer, Stakeholder, Approver)
Languages	English plus one (1) standard language
Currencies	Enable multi-currency – up to five (5) currencies and conversions initially configured. Client is responsible for creating additional currencies and for maintaining existing currency conversions

Standard feature configurations / review

Program Manager	Configure one (1) workflow with ten (10) tasks, including up to two (2) steps with approvals
Reporting dashboard	Configure one (1) standard dashboard with widget. Portlets: Messages, Calendar ,General Announcements, Quick Links, Quick Search, Project Statuses
RFx multi-lot	Enable RFX multi-lot
Reporting	Enable standard RFx datamart reporting (Title and description only in English)

Supplier Access	Enable Supplier Access (open and invite)
Envelope	Enable all envelopes
Category selection	Enable Category selection
Evaluation visibility	Enable Standard and blind evaluation visibility
Scoring method	Enable one (1) scoring method chosen from either Absolute or Percentage scoring.
Auction	Activate English Auction – Forward and Reverse

Primary Data Load

Suppliers	Perform a one-time load of suppliers in Client's Production site and a subset in Client's Test site (up to one hundred (100) in Preproduction and up to one thousand (1,000) in Production)
Category Tree	Perform a one-time load of Category Tree in Client's Production site (if not already activated)
Business Units	Perform a one-time load of Business Units in Client's Production site
Regional Trees	Perform a one-time load of Regional Trees in Client's Production site

With the Standard Implementation offering, the Client is responsible for the following data loads:

Users	Perform a one-time load of users in Client's Production site and a subset in Client's Test site (including the Admin user)

Spend Analytics+

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Activation of standard configurations and education

Initial spend classification	90% classification of spend
Initial spend classification period	24 months of historical data (the total amount of past Spend data that JAGGAER will load as part of the initial Spend Implementation)
Taxonomy	JAGGAER Standard or Client-defined Category tree
Source Systems	Up to five (5) source systems
Total Invoice Record Count Limit	Up to 20 million records
Business Unit/Orgs	Up to ten (10) Business Unit/Orgs
Languages	One (1) data language and one (1) reporting language
Currencies	Up to three (3) JAGGAER standard currencies for reporting
Training	One (1) standard admin training session and one (1) standard end user training session
Refresh Services	Details regarding periodic refreshes are covered in the Order Form

Supplier Catalog Enablement and Purchase Order / Invoice Connections

For JAGGAER eProcurement and/or Invoicing, JAGGAER will setup catalog enablement configurations, supplier purchase order and/or invoice connections, and provide guidance to Client as described in the terms of the main subscription agreement found at https://www.jaggaer.com/terms-of-service/supplier-enablement-terms/.

Supplier Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Supplier Onboarding

Configurable Registration Profiles	Configure up to two (2) registration profiles: Basic and Full
Registration Questions	Configure up to five (5) registration questions, with up to ten (10) values each
Supplier Portal	Provide initial configuration of the Supplier Portal including branding options such as logo, theme colors, and messaging to suppliers.
User Roles	Enable the three (3) standard user roles and customize where needed: Supplier Manager (Viewer), Supplier Manager (Administrator), and Approver
Supplier Email Communications	Configure up to one (1) email communication template
Supplier Request Form	Provide initial configuration of the Supplier Request Form, with up to five (5) fields and ten (10) values for each field
OFAC Check	Enable OFAC Checking

Workflow

Supplier Request	Enable standard single-step approval workflow to manage supplier requests
Supplier Registration	Enable standard four (4)-step approval workflow to manage registration approvals
Supplier Review	Enable standard single-step approval workflow to manage supplier reviews, post approval

Primary Data Load

Supplier Load	Perform a one-time load of up to 5,000 suppliers in Client's Production site and up to fifty (50) in Client's Test site.

With the Standard Implementation offering, the Client is responsible for the following data loads:

User load	Client will perform a one-time load of users in Client's Production site and a subset in Client's Test site

Supplier Management+

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application settings

User agreement	Configure bespoke user agreement
User roles	Configure up to four (4) standard supplier user roles for supplier management and one (1) Admin user (Customer creates additional users)
Languages	Configure one (1) standard language – English (US) plus one (1) additional standard language

Standard feature configurations / review

Category Tree	One-time load of category tree (provided in JAGGAER template/format)
Supplier registration fields	Configure standard registration fields – selectable from a pre-defined system fields that cover Company Information, Address, Tax numbers and main user contact details
Supplier forms	One (1) onboarding and one (1) additional form (no category forms)
Supplier profile questions	Configure up to twenty (20) supplier profile questions
Supplier Statuses	Includes three (3) platform supplier statuses – registered, active, deactivated and activation of additional parameter to configure three (3) additional statuses
Portal	Activation of customer portal including welcome page and logo.
Google captcha	Enable Google captcha
Category Selection	Enable ability for suppliers to categorize themselves against the Category Tree during registration
Supplier 360 form	Configure Supplier 360 form
Dashboard	Enable one (1) configurable dashboard with widgets
Reporting	Enable standard RFx datamart reporting and report builder functionality

Assessment types – pick one (1) standard assessment type:

<table>
<tr><th>Assessment Type</th><th>Workflow</th><th>Assessment</th></tr>
<tr><td>Supplier Qualification</td><td rowspan="4">Configure up to five (5) workflow steps per assessment type</td><td rowspan="3">Configure one (1) scorecard template including up to ten (10) KPIs, with up to five (5) assessment statuses and twenty (20) assessment questions, per assessment type</td></tr>
<tr><td>Supplier Segmentation</td></tr>
<tr><td>Supplier Risk</td></tr>
<tr><td>Supplier Category</td><td>Configure up to three (3) custom Category Assessments with one (1) scorecard template including up to ten (10) KPIs, with up to five (5) assessment statuses and twenty (20) assessment questions</td></tr>
</table>

Primary Data Load

Suppliers	Perform a one-time load of suppliers in Client's Production site (up to one thousand (1,000)) and a subset in Client's Test site (up to one hundred (100))
Category tree	Perform a one-time load of category tree in Client's Pre and Production site (using the JAGGAER template)

Supplier Performance Management+

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Enterprise Scorecard	Configure up to one (1) enterprise scorecard templates consisting of up to thirty (30) KPIs per scorecard and five (5) Performance Categories (PCs). One (1) x Scoring grade One (1) x Performance grade (no surveys)

Direct Modules

Direct Advanced Shipping Notice (ASN)

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Delivery note	Standard delivery note form with attachments, shipping reference, batch number
Print layout	One (1) standard print layout
Roles	Configure three (3) standard user roles related to ASN

Configurations

Supplier Portal	Standard supplier portal setup
Dashboard	Standard dashboard creation
Supplier Communication	Enable standard reminder and email template
Packaging	Free packaging, handling units maintained in JAGGAER
Label Layout	One (1) standard label layout

Primary Data Load

Primary Data	One-time excel load of primary data (Units, Delivery conditions, etc.) or standard ERP interface

ERP Integrations (Standard Interface)

Delivery notes	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from JAGGAER into the ERP.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Organization, Plant to Purchasing Org, Incoterms, and ISO Codes.

Direct Category Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Category Assessment & Segmentation Dimensions	Configure two (2) standard Dimensions (e.g. Supply Risk and Profit Impact)
Category Strategy	Configure one (1) Category Strategy using a global / company-wide level
Strategic Analysis	Configure custom Strategy Analysis based on up to ten (10) criteria
Custom Methods	Configure up to five (5) standard Methods (flat / no hierarchy)
Category KPIs	Configure up to two (2) Category KPIs (Spend & Supplier status)
Actions	Configure the ability to create and track actions with own organization and suppliers
Supplier KPIs	Configure up to two (2) standard Supplier KPIs (Status, Spend)
User Roles	Configure up to three (3) standard roles related to Category Management

Standard Feature Configurations

Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates
Strategy Export	Enable Strategy Export via Excel

ERP Integrations

Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Categories and Spend Data.

Direct Supplier Quality Notifications (SQN)

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Integrations with the SQN module are limited to SAP only.

General Application Settings

Supplier Responses	Configure one (1) supplier response type (includes acceptance and comment)
Dunning	Configure dunning related to response type
Approvals	Configure a 1-Level response approval. The supplier response is checked and approved in JAGGAER before it can be sent back to the ERP
User Roles	Configure one (1) standard user role related to Complaint Management

Standard Feature Configurations

Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates
Error and Response Codes	Configure error and response codes and educate client how to maintain them or import them via an ERP integration.

ERP Integrations

Complaint / Quality Notification from ERP	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Approved Response from JAGGAER	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from JAGGAER into the ERP.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Organization, Plant to Purchasing Org, and Error Codes

Direct Delivery Call-Offs

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Order Document	Configure one (1) Order Document
User Roles	Configure up to three (3) custom user roles related to Delivery Call Offs

Standard Feature Configurations

Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates
Call-Off Export	Enable Call-Off Excel Export

Primary Data Load

Primary Data	One-time excel load of primary data (Units, Delivery conditions, etc.) or standard ERP interface

ERP Integrations: Integrations with SAP only. Standalone requires scoping.

Delivery Call-Off Import (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Organization, Plant to Purchasing Org, Incoterms, Payment Terms, and ISO Codes.

Direct Document Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Document Types	Configure up to five (5) document types. Each document type contains general document properties, (e.g. status, valid dates, etc.), link to organization (e.g. supplier, plant, etc.) default access rights, and notifications
Custom Fields	Configure up to three (3) custom fields per document type
Access Rights	Configure access rights by document type
Workflow	Configure communication workflow to occur on 'Notification on Date' (e.g. valid until date reached)
Actions	Configure solution to create and track document related actions with colleagues
User Roles	Configure up to five (5) standard user roles related to Documents Pure

Standard Feature Configurations

Supplier Dashboard	Configure one (1) supplier dashboard
Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates

Direct Forecasting & Vendor Managed Inventory (VMI)

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings for Forecast

Demand Forecast	Configure the demand forecast based in Supplier / Material / Plant
Supplier Visibility	Configure the supplier portal view and standard Excel Export
User Roles	Configure one (1) standard user roles related to Forecast / VMI

Standard Feature Configurations

Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates

ERP Integrations: Integrations with SAP only. Standalone requires scoping.

Forecast Import (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Organization, Plant to Purchasing Org, Incoterms, and ISO Codes.

Direct Long-Term Vendor Declaration (LTVD)

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Supplier Declarations	Configure Supplier Declarations (material / plant combinations and country of origin and preference zone defaults)
Dunning	Configure the solution dunning for due declarations, including customizable 2 level dunning (first and second reminder)
User Roles	Configure one (1) custom user role related to LTSD

Standard Feature Configurations

Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates

ERP Integrations (SAP only. No support for SAP GTS or other ERPs)

ERP integration for plant / material supplier combinations	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Preference Declaration from Supplier	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from JAGGAER into the ERP.

Direct Purchase Order Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Supplier confirmation screen	Enable Confirmation screen
Change options	Configure supplier confirmation change options: Change date and split quantity
Order document	Configure one ERP Print order document
User Roles	Configure up to three (3) standard user roles related to Purchase Order Management

Configurations

Supplier Portal	Standard supplier portal setup
Dashboard	Standard dashboard creation
Supplier Communication	Enable standard mail templates and reminders

Primary Data Load

Primary Data	One-time excel load of primary data (Units, Delivery conditions, etc.) or standard ERP interface
Users	Client to perform a one-time load of users in Client's Production site and a subset in Client's Test site.

ERP Integrations (Standard Interface)

Purchase orders	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Document Import	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Order Confirmation	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from JAGGAER into the ERP.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Groups and User, Purchasing Organization, Plant to Purchasing Org, Incoterms, Payment Terms, Factory Calendar, and ISO Codes.

Direct Sourcing

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

RFQ Types	Configure up to one (1) RFQ type
Cost Breakdowns	Configure up to two (2) cost breakdowns with up to twenty (20) fields and two (2) custom fields each
Evaluation Matrixes	Configure up to two (2) quotation evaluation matrixes
Custom Fields	Configure up to two (2) custom fields on header or item level
User Roles	Configure up to three (3) standard user roles related to Sourcing

Standard Feature Configurations

Supplier Qualification	Enable the ability to search by category
Supplier Portal	Setup of supplier portal
Item import	Setup of excel import
Event Documents	Manual event documents (general and item)
Supplier communication	Enable standard email templates
Reporting	Provide a review of JAGGAER standard reports
Info record creation	Configure advanced info record creation (multi info records)

Primary Data Load

Primary Data	One-time excel load of primary data (Plants, Units, Delivery conditions, etc.) or standard ERP interface
Material List	One-time excel load of up to 500 materials or use standard ERP interface

ERP Integrations (Standard Interface)

Material sync	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Purchase Info Record	JAGGAER will provide applicable ERP interface documentation & support for the Client integration setup. These integration are exports from JAGGAER to the Client ERP.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Groups and User, Purchasing Organization, Plant to Purchasing Org, Categories, Incoterms, Payment Terms, ISO Codes, Exchange Rates, and Purchasing Value Keys.

Direct Supplier Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

Supplier Onboarding

Configurable Registration Profiles	Configure up to two (2) registration profiles: Basic and Full
Registration Questions	Configure up to one hundred (100) general questions
Supplier Qualification Level	Configure Global and Category qualification levels
Supplier Profile Maintenance	Provide profile and certificate update reminders
Duplicate Check	Enable a duplicate check as part of the registration process

Workflow

Supplier ERP Form	Provide initial configuration of the Supplier Form, with address data (up to 15 fields)
Registration Workflow	Configure a single registration approval step, per profile
ERP Creation Workflow	Configure a single standard creation approval step

General Supplier Management Features

User Roles	Enable up to three (3) standard user roles related to Supplier Management
Supplier communication	Enable standard mail templates
Supplier Dashboard	Configure one (1) supplier dashboard, with up to five (5) manually maintained entities
Actions	Enable actions to create and track actions with suppliers
Supplier Portal	Provide initial configuration of the Supplier Portal including branding options such as logo, theme colors, and messaging to suppliers

Primary Data Load

Supplier Load	Perform a one-time load of up to 500 suppliers in Client’s Production site and up to fifty (50) in Client’s Test site or standard ERP interface

Users	Client to perform a one-time load of users in Client's Production site and a subset in Client's Test site

ERP Integration (Standard interface)

Supplier Synchronization	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from ERP into JAGGAER.
Table Sync – (SAP Only)	JAGGAER will provide applicable ERP interface documentation & support for Client integration setup. These integrations are exports from SAP into JAGGAER and include the following: Legal Entities, Plants, Purchasing Organization, Categories, and Incoterms.

Direct Supplier Performance Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Scorecard	Configure up to two (2) scorecards, each with up to fifteen (15) soft fact questions, up to four (4) hard facts, 'assessments' on supplier level, and 'answerers' setup as either teams (e.g. Logistic) or specific users (e.g. responsible buyer per supplier)
User Roles	Configure up to three (3) custom user roles related to Supplier Scorecard

Standard Feature Configurations

Assessment Tracking	Configure assessment tracking at the scorecard level (Supplier)
Supplier Comparison	Configure the solution to compare suppliers and rating cycles
Reports	Enable one (1) standard Excel report of comparison results
Hard Facts	Configure solution to store and maintain hard facts (e.g. risk assessment per supplier)
Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates

Advanced Feature Configurations

Actions	Configure solution to create and track actions with suppliers, based on results

Primary Data Load

Hard Facts	Client will load hard facts in Client's Test and Production site

Tool Management

For the application and applicable Functional Component (s) referenced in the Statement of Work, JAGGAER to perform configurations and provide guidance to Client on best practice configurations per the scope detailed below.

General Application Settings

Tool Type Templates	Configure one (1) standard Tool Type template
Supplier Collaboration	Configure the solution to support tool maintenance
Approvals	Configure approvals - Client approves all tool changes that are made by supplier
Reminders	Configure the solution to support reminders
Change History	Configure the solution to support change history
User Roles	Configure up to three (3) standard user roles related to Tool Management

Standard Feature Configurations

Dashboard	Configure one (1) Tool Management dashboard
Supplier Portal	Configure the Supplier Portal
Email Templates	Enable standard email templates

Primary Data Load

Material data	One-time excel load of full material list

The following functional areas are not part of the configuration or review during the project as a part of a JAGGAER Standard Services engagement.

Indirect Modules	
Contracts+	Dynamic Main Document Templates Clause Library Alternative Language Internal Review Round workflow Sell Side Contract support Looker Business Analytics
eProcurement	Multiple Business Units
Inventory	Kiosk support PR / PO Workflow Invoice Sales Orders
Invoicing	Budget Checking Single Use Authorization (SUA) cards Digital Mailroom Digital Capture
Sourcing	Auction support Commodity Code support Sourcing Quick Quote Multi-Stage Events Advanced Evaluation Tools
Sourcing+	Auction types, custom fields, and templates Approval matrix Configurable dashboards Report builder All scoring methodologies Sourcing data integrations and SSO

	Project/RFx loading Public APIs
Spend Analytics+	Direct Spend data Custom data templates Custom built reports/dashboards Custom training sessions
Supplier Management	Supplier Performance Management (Tier 2 Reporting, Dynamic Qualification, and Risk Compliance) Visual Compliance support
Supplier Management+	Supplier Development Plan Report Builder Business Unit Tree and Regional Tree Public APIs Bulk loading of assessments and scorecards Supplier data integrations and SSO User loads
Direct Modules	
Direct Advanced Shipping Notice (ASN)	Custom fields Packaging with schemes Integration with 3rd Party Logistics Service Provider Classic EDI Interaction with Call-Offs (if licensed) Multi-ERP
Direct Category Management	3rd party integration
Direct Supplier Quality Notifications (SQN)	File exchange between JAGGAER and ERP Advance response types (e.g. 8D) Intermediate ERP Status updates 3rd Party integrations Multi-ERP OR non-SAP
Direct Delivery Call-Offs	Order Documents Delivery / Shipment notification Call-Off Confirmation Classic EDI Multi-ERP
Direct Document Management	Sub-documents Access rights on the individual document level Ability for supplier to edit documents (roadmap)
Direct Forecasting & Vendor Managed Inventory (VMI)	Vendor Managed Inventory 3rd Party integrations Multi-ERP
Direct Long-Term Vendor Declaration (LTVD)	Custom fields Non-SAP ERP Systems including SAP GTS Multi-ERP
Direct Purchase Order Management	Custom fields and order conditions Change monitor and approval Service Entry sheets

	Invoice routing / PO flip Classic EDI Multi-ERP
Direct Sourcing	Buyer's workbench and requisitions Approval workflow ERP integration (source list, purchase order) Multi-ERP 3rd Party integrations
Direct Supplier Management	ERP creation interface Blocked lists checks Golden Record and Supplier Grouping Multi-ERP 3rd Party integrations
Direct Supplier Performance Management	Hard facts from ERP Actions 3rd Party integrations
Direct Tool Management	Custom Tool Templates Custom Fields Tool creation by supplier Tool replacement