Prepared for

[CLIENT NAME]

Prepared by

[BQ CREATOR]

Configuration Documentation

[DELIVERY DATE]

Configuration Documentation testing

[DELIVERY DATE]

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Document Information and Revision History

**File Name**

[CLIENT NAME]\_Configuration\_Document.docx

**Original Author(s)**

[BQ CREATOR]

**Current Revision Author(s)**

[BQ CREATOR]

**Version**

**Date**

**Author(s)**

**Revision Notes**

**1.0**

[BQ CREATOR]

Initial Creation

Document Abstract

The following pages will display the details for the configuration components for the [CLIENT NAME] project. The purpose of this document is to highlight and document the base system configurations for site set up.

UI Management

Themes

Color scheme is configurable. This configuration enables clients to brand the platform to fit the organizations branding policy.

Theme Colors:

**Color**

**Value**

**TBD**

TBD

**TBD**

TBD

**TBD**

TBD

Theme Logo:

**Them logo name**

*[image URL or embed]*

Carousel

Carousel on the home page offers the ability to provide news or updates via images to the buying community.

**Recommended Size**

1894 x 700

**Number of Slides**

3-4

Provide Images:

**Image Name**

*[image URL or embed]*

**Image Name**

*[image URL or embed]*

**Image Name**

*[image URL or embed]*

**Image Name**

*[image URL or embed]*

Unsupported Browser Messaging

Messaging for the Deprecated/Unsupported Browser message shown for IE users (Version 9 and below) by utilizing the static blocks feature.

Configure:

Yes

No

Store Email Management

System emails must have a Store Name and Sender information. The system will have a default store name and sender information if not configured by the client.

Configure:

**Email Address**

**Name**

***[TBD]***

*[TBD]*

Global > UI Management – Notifications – Display Cart

The setting in Manage System Configurations > Global > UI Management > Notifications > Display Cart should be set to false.

Marketplace

Search

BuyerQuest search is powered by SOLR. Within BuyerQuest the customer is able to make some small configuration changes. We highly recommend the below configurations.

Configure:

**Name**

**Description**

**Configuration**

Relevancy

When searching in the search bar results can be returned as “AND”. When searching for “black pen” you will receive results of items that have both black AND pen terms. When searching in “OR” mode for “black pen”, you will receive results of items that have either black OR pen terms.

AND OR

Partial Word Match

When searching for Nokia with this configuration set a s ”Yes”, if you search for “Nok”, you will receive search results for Nokia

Yes No

Product Listing Page

Capability to display select attributes underneath the products within the product listing page and to provide more information for the buyers without clicking into each page. These attributes can be displayed along with the main attributes SKU, UOM and Supplier. It is recommended to show only critical attributes regarding the product.

Examples of Typical Attributes Displayed (Recommend additional 1-4)

• MFG Name

• MFG Part Number

Configure:

**Attribute 1**

TBD

**attribute 2**

TBD

**ATTRIBUTE 3**

TBD

**aTTRIBUTE 4**

TBD

Product Display Page

Capability to display attributes on the product details page to provide a better shopping experience for buyers. These attributes can be displayed along with the main attributes SKU, UOM and Supplier. It is recommended to show only critical attributes regarding the product.

Examples of Typical Attributes Displayed (recommend 1-3)

• UNSPSC

• MFG Name

• MFG Part Number

Configure:

**Attribute 1**

TBD

**attribute 2**

TBD

**attribute 3**

TBD

Matrix View

Category View that displays some of the Product Attributes directly on the Category Listing Page. This view will allow buyers to add multiple items to the cart from one screen while sorting by a particular attribute.

Configure:

**Category**

**Attributes**

TBD

TBD

TBD

TBD

TBD

TBD

Preferred Product Import and Configuration

Products may be designated as “preferred” to boost their ranking to the top of search results. Specific display of Preferred Products is also configurable.

Preferred Products may be imported.

Configure:

Display Preferred Product at the Top of each Search Results Page Based on Relevancy

Display all Preferred Products on Top of the First Search Results Page

Custom Flags may be assigned to Preferred Products with name and color specified for each. If no Custom Flags configured and assigned, the default Preferred Product flag (Option 1) is assigned.

Configure:

**Custom Flag (Option 2)**

TBD

**CUSTOM FlAG (OPTION 3)**

TBD

**CUSTOM Flag (OpTION 4)**

TBD

Quick Order Pad

Configure which Product Attribute Values are searched when a User performs a Quick Order entry. For instance, if the Manufacturer Part Number is marked as ‘Yes’, then Users can enter in the Manufacturer Part Number to the Quick Order entry box and the corresponding Products will be returned.

Configure:

**Attribute 1**

TBD

**attribute 2**

TBD

**attribute 3**

TBD

Merge Lines

Allows the User to decide whether they want to have the same products in a cart merge together or have them separate.

Configure:

Yes

No

Collaborative Carts

Collaborative cart is used when more than one User would like to add items to the same cart so all items can be checked out at the same time. When turned on, all site Users will have access to use the Collaborative Cart. The system default is No.

Configure:

Yes

No

Content Groups

Access to Suppliers' Products is based on Content Groups. A supplier can be assigned to one or many content groups. If a user is not assigned to a content group that is associated to a given supplier, the user will not have access to that supplier's catalog content. Content groups also determine access to suppliers’ available in web forms and RFQs. Many times content groups are defined by the user’s region and super users (see ALL catalogs).

Documents, Reports, and Users may also be filtered based on Content Group. Payment method may also be configured by Content Group. See the Section Payment Method.

Configure Content Groups:

**Content Group Name**

**Description**

**Filters (User, Reports, Documents)**

**Name 1**

TBD

**Name 2**

TBD

**Name 3**

TBD

**Name 4**

TBD

Roles and Permissions

Access to functionality is dependent on the permissions set for a User Role. Standard roles are defined in the BQ admin which can be further configured or new roles can be created.

Users may also be permissioned to register and manage other users.

Configure Roles and Permissions Name and Description:

**Role Title**

**Description**

**Permission Name 1**

TBD

**Permission Name 2**

TBD

**Permission Name 3**

TBD

**Permission Name 4**

TBD

Configure Roles and Permissions:

**Document Name**

*[LINK SSC\_ROLES\_AND\_PERMISSIONS.XLSX]*

Home Page Widgets

Home page widgets help to configure the Home Page based on the User Role and what is important for that type of user to see when logging into the Marketplace. The widgets can be placed either in the main area or in the sidebar. Configuring right widgets on the Home Page saves time for the user.

Configure:

**Document Name**

*[LINK SSC\_HOMEPAGE\_WIDGETS\_TEMPLATE.XLSX]*

Base Currency and Language

Base Currency and Language are fields that will be used by the majority of users. Typically, both fields are English and USD.

Configure:

**Base Currency**

TBD

**Base Language**

TBD

**Date Format**

TBD

Location/Country Management

Configure:

**Allowed Countries**

**Postal Code Required**

**State/Region Required**

**Country Name 1**

TBD

**Country Name 2**

TBD

**Country Name 3**

TBD

**Country Name 4**

TBD

Currencies and Languages

Enabling multiple currencies in BuyerQuest allows the client to deal with more than one currency. It is very important to understand different types of currencies used in the BuyerQuest application. The BuyerQuest application uses the following terms to describe the different places in the system relating to currencies and how they are used.

**Base Currency**

Currency used by the system to store monetary values internally

**Product Currency**

Currency provided by a supplier

**User Preferred Currency**

Translated currency visible by the user in search page and cart total

Language locales can be configured and used by different users. The following areas will be impacted by different languages when enabled.

**User Interface**

Depending on the language selected by the user, the UI will have all non catalog content data in the language selected.

**Catalog Data**

The catalog data will be in the selected language only if the supplier provided it as such.

Configure:

**Currencies to be used (Buyers)**

TBD

**Currencies to be used (suppliers)**

TBD

**Currency decimal points**

TBD

**Currency Webservice API**

Fixer.io Webservicex OpenExchangeRates NA

**Locales to Be used (buyers)**

TBD

**locales to be used (suppliers)**

TBD

Product to be Available by Quote Only

Products may be configured as being available by Quote Only, accommodated in the Stock Availability column of the Common fields catalog upload file or specified by product in the admin panel. When a product is available by quote only, the availability and price are determined by RFQ.

Allow for Stock Status of Available by Quote Only

Yes

No

Attach Items to be Available by Quote Only (if applicable)

**Supplier Name**

Character Handling Config in Punchout Order Message (POOM BQ to ERP)

BuyerQuest offers a choice for handling non-keyboard characters in cart transfers to be configured for ERP compatibility.

Configure Character Handling for Non-keyboard Characters in POOM

Convert to ASCII

Convert to HTML

No Character Conversion

Suppliers – Multiple-Supplier Punchouts

BuyerQuest supports shopping from supplier sites serving as aggregators (sometimes known as Marketplace sites), where a buyer may shop from more than one supplier. This capability supports shoppers buying and transferring carts from multiple suppliers on a punchout. To configure this capability, a listing of suppliers serving as aggregators is necessary.

List Suppliers whose sites provide access to additional suppliers

**Supplier Name**

**Supplier Name**

**Supplier Name**

Suppliers – Multiple Catalog Uploads

Suppliers may upload multiple catalogs using a single catalog file. Access to specific catalogs is then configured and filtered by Content Group. To properly configure and support this capability, it’s necessary to list the suppliers uploading multiple catalogs.

List Suppliers uploading multiple catalogs

**Supplier Name**

**Supplier Name**

**Supplier Name**

Catalogs – Conditional Rules for Catalog Upload Approvals

Catalogs may be set to be auto-approved, manually approved, or conditionally approved. Organizations configuring conditional catalog upload approval may specify a percentage of tolerance for price increases in the catalog file to trigger approval, and then also designate an approver.

**Percentage Price Increase**

**Approver**

Payment Terms:

Customer allowed payment terms. Payment terms can be used in a procure-to-pay implementation OK-to-Pay file as well as invoice validation.

Configure:

**Payment terms**

TBD

UNSPSC Codes

UNSPSC codes are utilized in the following ways within BuyerQuest:

• Validating supplier catalogs based on UNSPSC codes

• Utilizing the UNSPSC codes to map to the category tree

• Mapping of UNSPSC to Commodity Groups, when Commodity Groups are implemented.

Configure:

Client to Provide

BuyerQuest Standard

Items with Unknown or unmapped UNSPSC codes may be configured in catalog management to be assigned a default category to allow their import.

Configure:

Allow import of products with unmapped UNSPSC codes

Do not allow import of products with unmapped UNSPSC codes

Category Tree

The category tree is utilized for browsing the marketplace. BuyerQuest can load a generic category tree to start the process.

Configure:

Client to Provide

BuyerQuest Standard

Unit of Measure

This feature allows an Admin to define the approved list of UOM that a supplier can use on their catalog. These will be used in defining how items are sold (i.e. sold individual or each [EA], or by the dozen [DZ], etc.)

Configure:

**Document Name/Link**

TBD

Ratings and Reviews

When set to yes, this setting allows the BuyerQuest system to automatically approve all product Ratings and Reviews as soon as they are submitted. As a result, Ratings and Reviews appear nearly simultaneously in the live system.

Configure:

Yes, allow auto approval of reviews

No, don’t allow auto approval of reviews

Request and Approvals

Approval Rules

Configure:

**Rule #1**

TBD

**Rule #2**

TBD

**Rule #3**

TBD

**Rule #4**

TBD

**Rule #5**

TBD

Approval Rule Exception Handling

The "Exception Handler" User will be the fallback Approver or Watcher when the default Approver User, User Group, Watcher User, or User Group is inactive.

Configure:

**approval rule exception handler**

TBD

Rejection Reason

The Rejection Reason configuration determines whether it is required for an approver to submit a reason as to why they are rejecting a Request. Select Yes from Require a reason upon rejection to force an approver to provide a rejection reason when they deny a request Select No to allow the user to bypass providing a rejection reason.

Configure:

On

Off

Rejection Reason Management

Ability to define a list of generic rejection reasons for the approver to select from as well as allow approver to assign a custom reason.

Configure:

**Rejection reason #1**

TBD

**Rejection Reason #2**

TBD

Additional Fields

It is possible to configure the following fields at the line-item level in a request.

**Verifier**

User who is responsible for verifying the receipt of the line item in the PO

**Internal Notes**

Capture comments and notes that are accessible to the internal users only

Configure Verifier:

On

Off

Configure Internal Notes:

On

Off

Account Delegation

Ability to delegate to another user. Delegation can be to ANYBODY loaded in the platform OR can be limited to users with the SAME or GREATER Approval limit than the user.

Configure Delegation Type:

All

Same/Greater Approval Limit Users

Configure:

**Max Delegation in Days**

TBD

Accounting

Accounting Groups

**Accounting Group #1**

TBD

**Accounting Group #2**

TBD

**Accounting Group #3**

TBD

**Accounting Group #4**

TBD

**Accounting Group #5**

TBD

Commodity Groups and G/L Account Support

Automatic assignment of G/L Account to purchases is enabled through imports of mappings between UNSPSC and Commodity Groups and Commodity Groups to G/L Account.

Implement Support for G/L Account

Yes

No

Purchase Orders

Change and Cancel Orders

Allows users to choose to allow cancel orders or change orders by supplier, decide what fields may be edited for them, and whether approvals are needed for change of the total. This will be done in accordance to the individual supplier agreement. Note that not all suppliers have the capacity or desire to allow change orders.

Configure Suppliers:

**Supplier**

**Change order**

**cancel order**

**Supplier Name**

Yes/No

Yes/No

**Supplier Name**

Yes/No

Yes/No

Configure Editable Fields:

**Name**

**Type**

**Accounting**

Internal External Don’t Allow

**Attachments**

Internal External Don’t Allow

**Quantity**

Internal External Don’t Allow

**Comment to Supplier**

Internal External Don’t Allow

**Internal Notes**

Internal External Don’t Allow

**Deliver To**

Internal External Don’t Allow

**Shipping Address**

Internal External Don’t Allow

**Need By Date**

Internal External Don’t Allow

**Verifier**

Internal External Don’t Allow

Enable Logical Line Item Delete

When enabled through configuration, deleted items remain visible on Purchase Orders but display marked as deleted.

Configure Logical Line Item Delete:

Yes

No

Default Billing Address

Provide the default billing address if only one billing address location is applicable for ALL users.

Configure:

**Billing Address**

TBD

Terms and Conditions

Define the terms and conditions that go on a purchase order.

Configure:

**Terms and Conditions**

TBD

Receiving

Receiving Rules

Configure:

**Rule #1**

TBD

**Rule #2**

TBD

**Rule #3**

TBD

**Rule #4**

TBD

**Rule #5**

TBD

Invoicing

Invoice Validation Rules

Specify whether each of the following should be configured for Invoice Validation.

PO Status is Closed

Yes

No

PO Status is Cancelled

Yes

No

Invoice Date is less than PO Creation Date

Yes

No

Duplicate Supplier Invoice #

Yes

No

Invalid UOM

Yes

No

Invoicing Rules (Reconciliation and Approval)

Configure:

**Rule #1**

TBD

**Rule #2**

TBD

**Rule #3**

TBD

**Rule #4**

TBD

**Rule #5**

TBD

Invoicing Rule Exception Handling

The "Exception Handler" User will be the fallback Approver or Watcher when the default Approver User, User Group, Watcher User, or User Group is inactive.

Configure:

**invoice rule exception handler**

TBD

Payment Method – Settlement Provider

If Settlement provider is to be used, specify which content groups choose payment via settlement provider.

**Content Group Name**

**Payment Via Settlement Provider**

Yes No

Yes No

Yes No

Yes No

Yes No

Yes No

Business Intelligence Configuration

Good Data

Reporting that provides rich data based on end user activity (spend by category, spend by user role, etc). The end results are attractive, front-end reports that provide a snapshot of end-user spending.

Configure:

Yes

No

Google Analytics

Google analytics tracks end users to see how they are using the site. For example, GA administrators can view end users to see how long they stay on a page, and observe general behaviors during a site visit.

Configure:

Yes

No

If Yes, provide users that will have access

**Name**

**Email Address**

TBD

TBD

TBD

TBD

Admin Access

Access to admin Panel

We will give backend access to a limited amount of users. Backend access configures the entire site and the changes are reflective on the front end.

Configure Users:

**Name**

**Email Address**

TBD

TBD

TBD

TBD

Configure Admin Roles

**Role Title**

**Description**

**Administrators**

Access for Client users

**Google Administrator**

Access for BuyerQuest users

Approval process

**Name**

**Position**

**Signature**

**Date (YYY-MM-DD)**