

MARKETPLACE 15.2 RELEASE/UPGRADE NOTES

IN PRODUCTION STARTING July 20, 2015

New Features:

- Improved search capability around forms; customers can both search for forms using existing document search functionality and view audits detailing the usage of each form.
- New Quick Quote request wizard eliminates the need for a formal sourcing event, rather, vendors can submit quotes and reviewers can quickly evaluate and award the event via a simplified requisition process.
- Redesigned document interface allows for easier navigation and overall usability across devices.
- Enhanced dashboard experience; new dashboard classification will give customers more control over end users General and Shopping home pages.

Shopping Enhancements

New Document Layout Option for Requisitions and Purchase Orders

In 15.2, an updated document display for requisitions and purchase orders that is designed to make the documents easier to use and to make it easier to train your users. Organizations have the option to change the layout from the current tabbed format ([Classic Layout](#)) to a new layout with a left-navigation menu ([Updated Layout](#)). While all existing functionality remains the same, the new layout option allows for easier navigation that more closely matches other areas of the application.

The Updated layout type is optional in 15.2. You are still able to use the Classic layout. The layout type is configured on the organization level and

is configured by document type. For example, you may choose to change only POs to the Updated layout.

Key points of Feature

- This feature is **Off** by default but can be enabled by an administrator.
- New Permissions related to this Feature: None
 - The Updated layout contains all of the same information and functionality as the Classic layout.
 - The Updated display contains a left navigation menu for accessing different areas of the document. The main menu items correlate with the main tabs in the Classic layout. Sub-menu items correlate with the sections configured in the document configuration.
 - The **Summary** screen contains all sections from the document configuration as well. You can expand the section to view the information.
 - In the Updated layout, high-level information important to the document is displayed above the left navigation menu so it is visible from anywhere in the document. This information may include supplier name, document status and document total.
 - A View Related Documents link will display on each document. Clicking this link displays a list of other related documents. You can view or print the documents directly from the display.

Ability to Capture a Quick Quote from Multiple Vendors Using a Form

Quick quotes are often required when you are requesting to purchase a good or service based on specific business rules; when a purchase is over a specific price threshold, for example.

Generally, the quick quote process involves creating a request for the good or service that is distributed to multiple vendors and the vendors reply with their quotes. Currently, the entire process for quick quotes takes place outside of SelectSite.

With the addition of the new form functionality, you will be able to create quick quote requests and the system will automatically distribute them to the selected vendors.

Note: In 15.2, the process for receiving quotes back from vendors will still be manual. Vendors will send the quote to you in the same manner as they do currently (by email, fax, etc.). If any information needs to be entered into the application from the quote, you will need to do so manually.

Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None
 - To create a quick quote request, you must use a form template that has been assigned a form purpose of **Quick Quote**. At least one form template with this purpose is required to use this functionality.
 - You identify the suppliers on the form or form templates. When the form is submitted, the request is sent to the email associated with the primary supplier contact.
 - Suppliers send quotes back via their normal method of communication (email, fax, etc.) Once a Quick Quote form has been submitted, an **Enter Quote** section becomes available on the form.
 - Within the section, there is an area to enter a quote for each supplier to which the request was sent. **Note:** You must have the **Edit Organization Orders** permission in order to enter quotes.
 - You can create a cart directly from the Enter Quotes section for the supplier who is "awarded" the business by clicking the **Create Cart** button for the associated supplier.
 - For additional information about configuring form request template setup in the Forms Wizard, please see **Forms Wizard** in the online searchable help.
 - For information about requesting services through a form request template, including quick quotes, please see **Configuring and Submitting Forms and Form Requests** in the **Shopping Handbook** or online searchable help.

Ability to Set Configurable Organization Dashboards as the Shopping Home Page

Configurable dashboards allow you to make frequently used tasks available from a single location. Often, the dashboards focus on shopping tasks or other tasks related to the purchase and approval of goods and services. As of 15.2, you will have the ability to make one or more organization dashboards the [Shopping Home](#) page. When you choose this option, the dashboard(s) replaces the default Shopping Home page. Any users who have the Shopping Home page set as their home page will see the dashboard when they log in to the application or click the [Home](#) icon. For users who have access to multiple Shopping dashboards, all dashboards are available from the home page. Users will be able to toggle between the available dashboards.

Shopping dashboards continue to be available from the [Dashboards](#) option in the user menu along with personal dashboards and organization dashboards assigned the General type.

Updates to the Widget Selector for Configurable Dashboards

The usefulness of a dashboard is dependent on the widgets that users choose to display. In 15.2, we have made it easier to determine and select the appropriate widgets for a dashboard. Previously, when users chose to add a widget, they had to select from a drop-down menu of available options. The list contained only the widget type with no description for the user's reference. Starting in 15.2, when a user chooses to add a widget, a pop-up window displays. The window contains all widgets available to the user and the information includes the widget type and a description. The user can add the widget directly from the pop-up window.

Supplier Class Information available on When Approving Documents

As of 15.2, supplier class information will display with the supplier name on documents within the My Approvals screen. This information will help approvers quickly identify the supplier class to assist in the approval of requisitions and purchase orders. In addition, you can filter the My

Approvals page by supplier class in order to view only documents for a specific supplier class that require your approval.