

MarketPlace Version 10.1 Product Release Notes

SPLIT BY AMOUNT OF PRICE AT THE HEADER LEVEL

Requisitions, purchase orders, and invoices can now all be split between different custom fields at the header level using amount of price. This will allow users to assign specific amounts to different accounts or codes when creating or settling an order, rather than being limited only to percent of quantity or price. For instance, if a requisition subtotal is \$9000, and a given account has exactly \$4000 left in it, the order can be split with \$4000 applied to the limited account and \$5000 applied to another account, rather than calculating those exact amounts using percentages of the requisition subtotal.

Key points of Feature:

- A split by amount of price at the header level of a requisition, purchase order, or invoice will prevent any line level splits; similarly, any splits at the line level will prevent splitting by amount of price at the header level.
- If a multiple-line order requires splitting by amount of price both at the header and line, the best practice would be to split at line-levels for each line.
- Much like the percent split options that exist today at the header, tax, shipping, and handling are not included when splitting by amount of price. Therefore, if shipping or handling amounts are added or changed during invoicing, the amounts specified for the accounts on the requisition may increase.
 - o Additional charges besides the subtotal, such as shipping, will automatically be split based on the distribution of the amount of price split. For example, if a \$100 subtotal order is split between two accounts assigned \$60 and \$40 respectively, any shipping, handling, or other amounts will be split with a 60/40 distribution.

EMAIL REMINDERS FOR PENDING APPROVALS

A new email reminder has been added for users with pending approvals for any document type. Approvers will get a reminder email after 5 days, and subsequent reminders after 3 days. An email will be sent to any user with a pending approval that is older than the specified interval, reminding them to approve the document if possible.

Key points of Feature:

- These settings are applied at the organization level, and cannot be changed for a specific user.
- An email reminder is sent per approval folder, and lists all documents within that folder older than the specified interval that the receiving user can approve.
- The reminders are generated a few times per day automatically, so the reminder may not be sent at the exact time of day the approval was created.

ADDITIONAL PRODUCT SEARCH FILTERS

Shoppers can now filter their product search results by the Green, Recycled, and Energy Star product flags. This allows users to quickly find items that may contribute to environmental efforts being made by the organization.

Shoppers can also filter results by result type. Search results return matching suppliers, forms, products, and instructions; a shopper can filter the results to only show matches of a specific type.

Key points of Feature:

- The Product Flag and Result Type filters work in a similar fashion to other product search filters, appearing along with other product search filters in the 'Refine and Filter Search' box on the left-hand-side of the product search results page.
- The Product Flag filter allows shoppers to narrow the search result set to Green, Recycled, or Energy Star products.
- The Result Type filter allows shoppers to narrow the search result set to one of the following result types:
 - Forms – Filtering by forms narrows the result set to only forms that matched the shopper's search criteria.
 - Punch-out Suppliers – Filtering by punch-out suppliers narrows the result set to any punch-out suppliers with supplier keywords matching the search criteria.
 - Products – Filtering by Products narrows the result set to only show products. This includes hosted catalog items, level 2 punch-out items, non-catalog items in favorites, and contract non-catalog items. Contract non-catalog items are only available and visible to organizations using the Contract Manager module.

GENERAL EMAIL NOTIFICATION ENHANCEMENTS

The standard notification email for workflow actions has been enhanced with additional information, making the email more meaningful to the end user. For relevant document actions, the email notification now contains information on who prepared a cart, who rejected a document along with any note they added, and the cart name and number.

Key points of Feature:

- The information header at the top of a notification email has been improved slightly to be easier to read at a glance.
- The cart name and number, as well as either prepared by/prepared for information, has been added to the information header of the email notification.
- If the notification is for a rejected document, the name of the person who rejected the document in workflow will be included, as well as any note they may have added.

PUNCH-OUT SUPPLIERS VISIBLE IN PRODUCT SEARCH RESULTS

Administrators now have the ability to show punch-out suppliers in search results alongside catalog and form items using search keywords defined on the supplier. When a shopper searches on a keyword matching a search term defined on the punch-out supplier, the supplier will be listed in the search results with a link to the punch-out site.

Key points of Feature:

- Turning this option ON returns punch-out suppliers in product search results alongside catalog and form items when the search criteria match keywords on the supplier's record.
- For suppliers who do not support Level 2 punch-out, this feature can be enabled to show a store-level punch-out in search results. This feature can also be used in conjunction with Level 2 punch-out to increase a supplier's visibility.
- Showing a Supplier Punch-out in Product Search Results:
 - Shoppers with access to the supplier punch-out site will see the supplier in product search results if the supplier keywords match the shopper's search criteria. Instead of an "Add to Cart" button there is an "Order from Supplier" link that takes the shopper to the supplier's punch-out site. The punch-out site will be ranked among forms and catalog items with respect to supplier class preference.
 - Supplier class icons display under the supplier in the product search results.

USER'S ABILITY TO SAVE PREFERRED PURCHASING ADDRESS ADDRESS

End-users now have the ability to save their supplier preferred purchasing address on non-catalog items/forms and in their cart. This is in addition to their current ability to save their preferred Purchasing address on the product details screen.

Key points of Feature:

- Turning this option ON allows end-users (once they have accessed their supplier's available Purchasing addresses) to select and save a preferred purchasing address as their own preferred, rather than the organization's default purchasing address. The users preferred purchasing address can be different than the one defined by the Administrator at the organization level.
- The next time the user accesses this supplier, the user's preferred purchasing address will be presented (i.e. the user will no longer have to choose his/her preferred purchasing address, as it will be "remembered" by the MarketPlace application).
- This single option controls the users' ability to save a preferred purchasing address in product details, the cart and the non-catalog items and forms.

- Important Notes:

- o Because this option will default to Off, if your users are currently using this feature on Product Details (the change preference option), this option will need to be enabled with the 10.1 promotion.

- o This option does not apply to Supplies Manager or Self Managed Catalogs. Users will have access to save their preferred Fulfillment Centers via the cart, non-catalog item/forms, and product details for Catalogs created by the Organization itself (i.e. internal stockrooms, store rooms, etc.). This functionality cannot be disabled.