HALO

HALO Portal

Supplier Resource Guide

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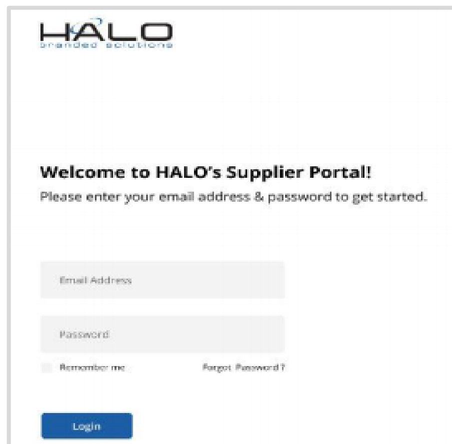
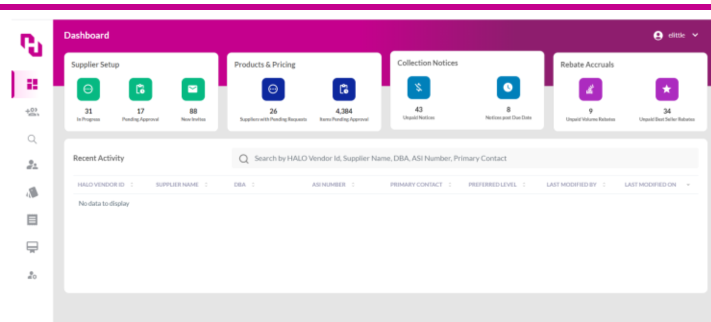
Overview

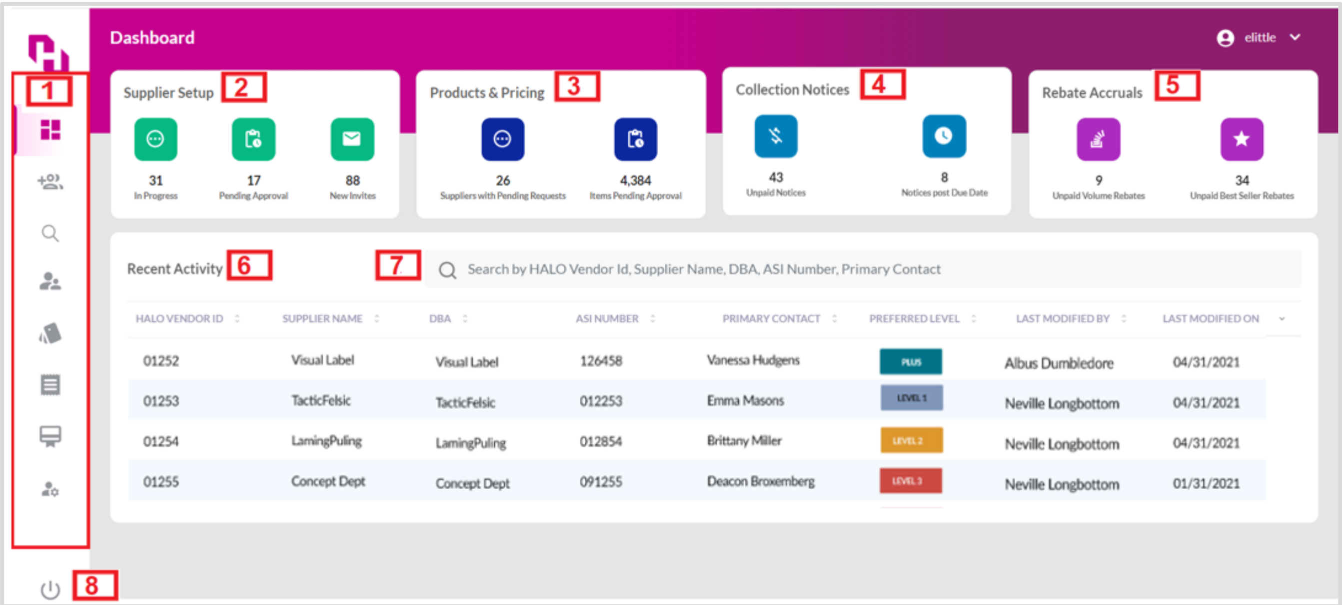
HALO Supplier Portal is a web-based application that facilitates the management of Suppliers and their journey with HALO. The Supplier Portal supports a seamless process for Suppliers to be onboarded onto the application and control their own information with HALO. The activities of onboarding, Information Management, Product Change Requests, Invoices, Rebate & Accrual are facilitated using the application.

The HALO Supplier Resources (SR) Team receives requests from various channels for new suppliers that want to offer products and services to HALO. The HALO SR Team conducts a series of actions to notify new suppliers to provide critical information for onboarding and assisting with maintaining the supplier information in HALO.

HALO Login

Step	Description/ Action	Details or Screen Shot
1	Creating the password for the HALO Supplier Resource Portal. NOTE: Reminder emails will be sent every 90 days to change the password.	The password must include: at least 8 characters one capital case (A, B, C, D, etc.) one lower case (a, b, c, d, etc.) one numeric digit (1,2,3,4, etc.) one special character (! @ $ etc.)
2	The HALO SR Team will log into the User Portal.	
3	Enter your **user email** in the first field.	
4	Enter your **password** in the second field.	
5	Click the **Login** button.	
	After three unsuccessful attempts, your account will be locked, and you will be barred from accessing the portal for 30 minutes.	
6	If login information is successful, the HALO user's **main menu dashboard** will display.	

Supplier Resource Dashboard Screen



After logging into the HALO Supplier Portal, the landing page is called the **Dashboard**.

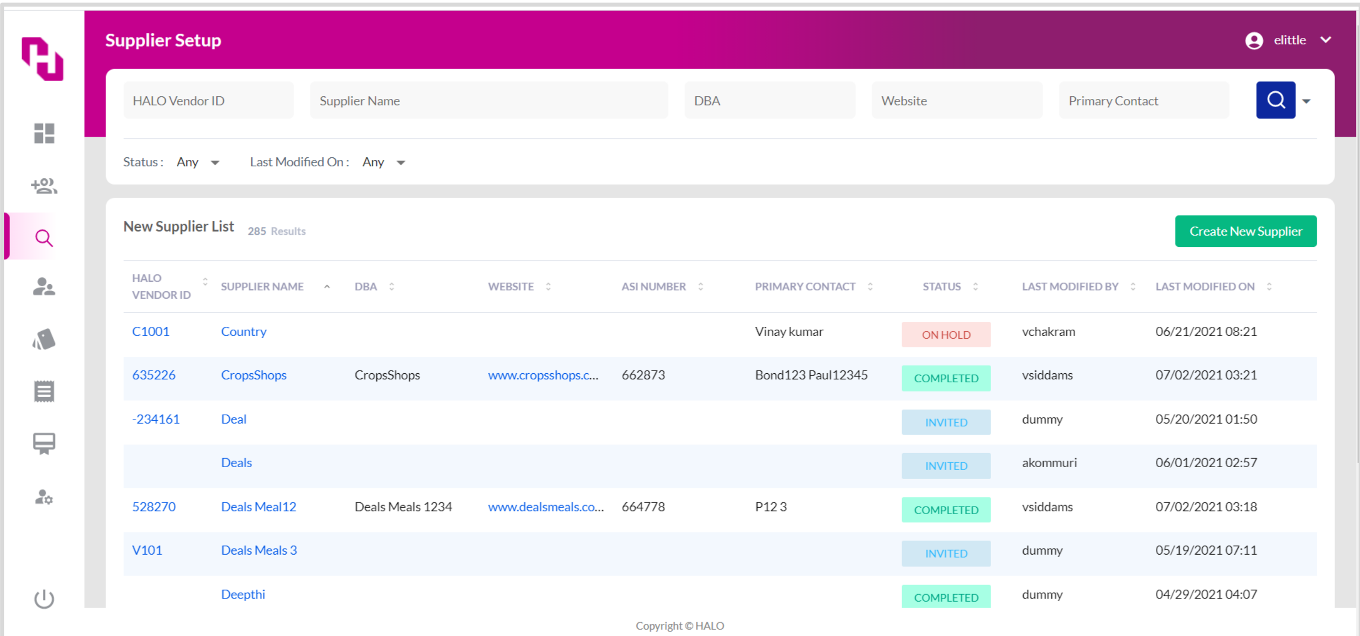
Step	Description/ Action	Details or Screen Shots
1	The **left panel menu bar** allows you to navigate to different screens of information:	The menu options are: ▪ Dashboard ▪ New Supplier Setup ▪ Supplier Setup ▪ Suppliers ▪ Products & Pricing ▪ Invoices ▪ Rebate Accruals/Collections Notices ▪ User Management
	QUICK TIP	At the top of the screen, there are summary cards with brief details about each section. Each summary card is a hyperlink to the detailed screens.
2	**New Supplier Setup card** - displays the count of Suppliers:	a. Pending Approvals b. In-Progress c. Newly Invited
3	**Product & Pricing card** - displays the count of:	a. Suppliers with Pending Requests b. Products Pending Approval
4	**Collection Notices** - displays the count of:	a. Unpaid Notices b. Notices past Due Date

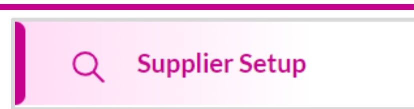
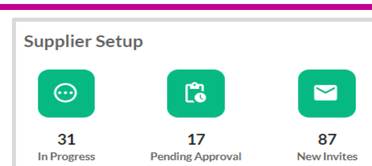
5	**Rebate Accruals -** holds the counts of:	a. Suppliers with Unpaid Notices (Collection Notices) c. Unpaid Best Seller Rebates d. Unpaid Volume Rebates b. Notices post Due date (Collection Notices)
6	The **Recent Activity** section holds a high-level information. It displays the last ten records that were modified by the user logged in.	The **Columns can be sorted**. Click on a Column Heading with a downward arrow at the end of the header name.  . If the arrow is pointing upward, that is the column the table is sorted by.
7	The **Search** field can be used with HALO Vendor ID, Supplier Name, DBA/AKA, ASI Number, and Primary Contact. The records are hyperlinked (HALO Vendor ID and Supplier Name) which can be used to navigate to Supplier Management of select record.	
8	**Logout** button.	

Review New Supplier Initial Checklist Screen

Objective: After the Supplier enters all the required information. The HALO SR (Supplier Relations) Team is notified to review and approve the new suppliers' information.

Exceptions: Suppliers can submit their information without completing the mandatory fields. The SR Team can approve the supplier while information is still being gathered.



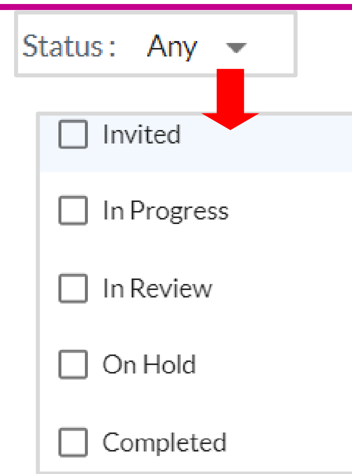
Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the names of the menu options. (Optional)	
2	Click the **Supplier Setup** button in the left panel.	
QUICK TIP	Click the **Supplier Setup** card at the top of the screen.	
3	To narrow the Supplier search results, enter the following: Vendor ID, Supplier Name, DBA, Website, or Primary Contact.	

4

Also use filtering to narrow the search results.

Click the down arrow (▼) to the right of **Status: Any** drop-down field:

- **Invited –** Suppliers invited to the portal, but have not yet accessed the HALO Supplier Portal.
- **In-progress –** Suppliers who have started filling information in the checklist screens.
- **In-review –** Suppliers whose checklist screens have been submitted and are waiting to be reviewed by the HALO Supplier Relation team.
- **On-Hold –** Suppliers whose applications have been kept on hold for any reason. The status is *internal to HALO* and would be revoked only by approving it at a later stage.
- **Completed** - (Approved) suppliers, whose checklist screens have been approved by HALO SR Teams.



5

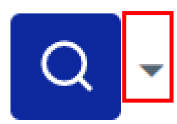
Last Modified On – is the date the last updates were made for that supplier.

NOTE By default, all drop-down search fields are set to **Any**, which allows all options to be returned in the search results.

6

After the search criteria has been entered or selected, click the **Search** button.

Click the down arrow (▼) to the right of **Search button** drop-down field to display the applied filters and the **Clear Filters** button.



Click the **Clear Filters** button to remove all the applied filters.

7

Search results displayed. Click the appropriate **Supplier Name** link that you need to review.

If suppliers match, they will display in the New Supplier List table.

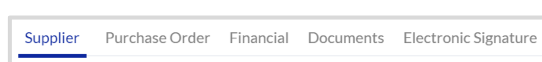
If a supplier does not match the search criteria, an error message will display – "No supplier records are found using search Criteria".

8

Review the 5 Checklist screens.

Supplier, Purchase Order, Financial. Documents and Electronic Signature.

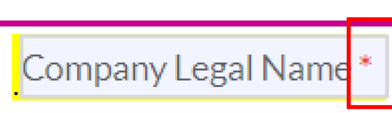
There are five Checklist screens of information to review:



The red dot to the left of each screen name indicates mandatory information is missing on that screen.

9

Review the mandatory fields, which have a red **asterisk *** at the end of each field name. Information must be input in each mandatory field.



10

Click the **Back** button to return to the previous screen

OR

Click the **Save and Continue** button to enter or update the fields and save the information on the screens.

11

After reviewing the information, users can choose to click the **Approve** button.

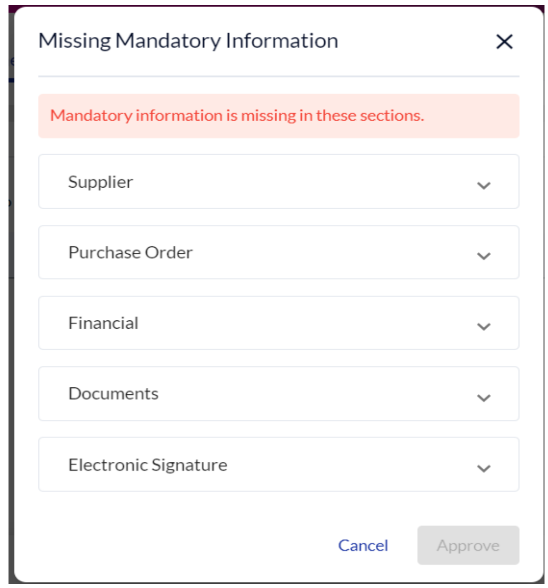
12

Even if the Supplier Check list screens are **incomplete,** the HALO SR Team can choose to approve the supplier.

A **Missing Mandatory** Information popup window displays with the mandatory fields missing data.

The system emails HALO SR Team that a supplier is approved with an incomplete checklist. HALO SR Team must manually follow up.

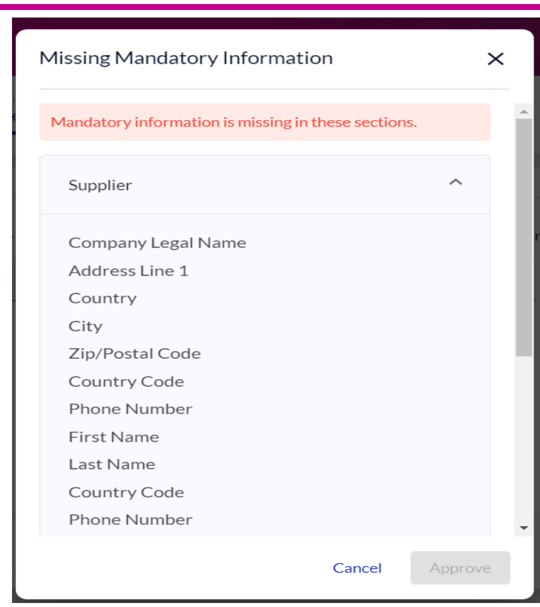
Click **Approve** or **Cancel**.



13

Click each field that is listed on the **Missing Mandatory Information** popup window.

For example, click the Supplier drop – down field to reveal the mandatory fields.



14

Put On Hold – puts the account in an unclassified state. The Hold will display on the Vendor Master in M3 and will be sync'd to the Supplier Portal.

15 If you don't want to Approve or Put the Supplier on Hold, click the **All Suppliers** at the top left of the screen to return to the Supplier Setup table to select another supplier to review.

16 Once the HALO Team approves the supplier, the supplier moves to a **Pseudo-Approval** state for 30 minutes.

- During the 30 minutes, if changes are not made either by HALO SR Team or by the supplier, the Supplier is approved.
- After the 30 minutes, if changes are made, the HALO SR Team must re-approve the record.

17 **Post-Approval** - the Supplier Setup checklist screens will be marked Completed and edit access is removed. Post Approval, HALO Supplier Portal communicates with M3.

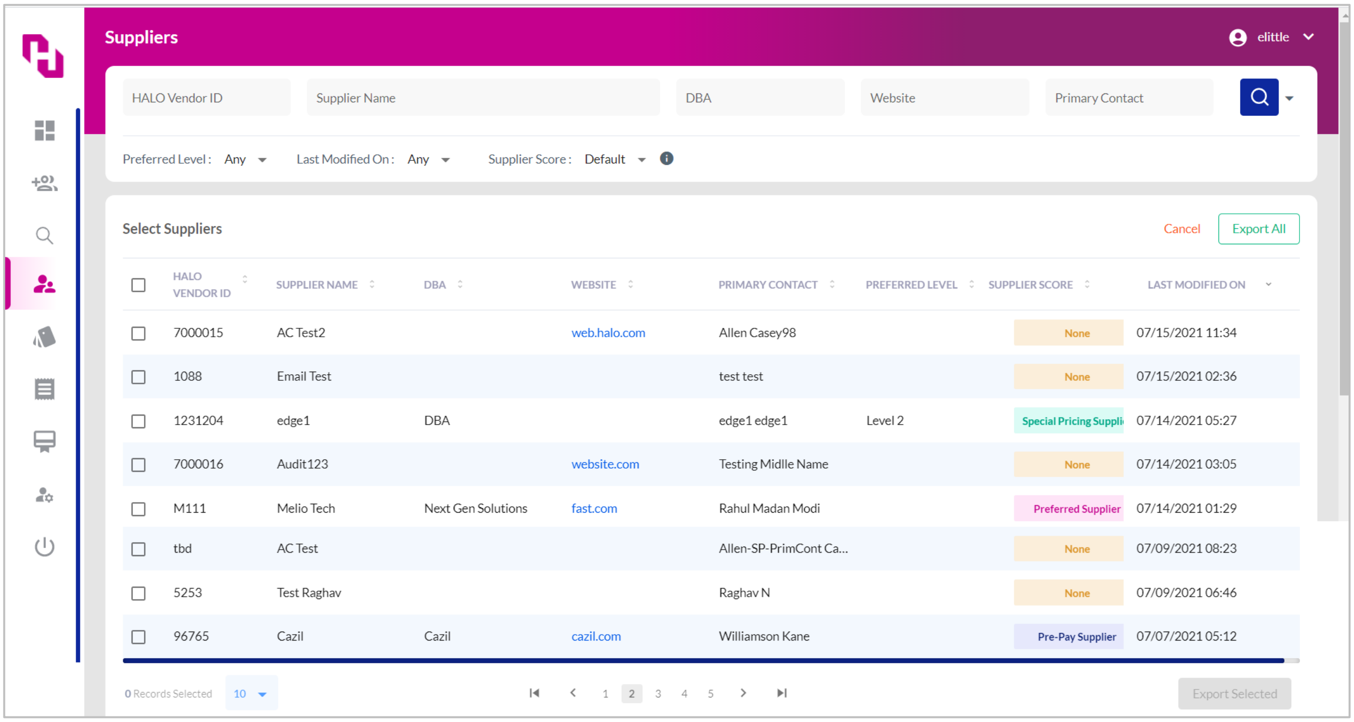
- The checklist is locked. Edit access is removed.
- The system creates the supplier record in the portal.
- M3 will provide a HALO Vendor ID if the supplier does not have an ID.
- This HALO Vendor ID is attached with this supplier for all future communications.
- Notification is sent to the HALO SR Team.
- An email is triggered to the supplier confirming the onboarding to the HALO Supplier Portal.

18 After the supplier information is approved, an **email** is sent to the specified supplier. The Email address (includes Ccing the HALO SR Team) and the email includes information on how to use the portal as displayed below:

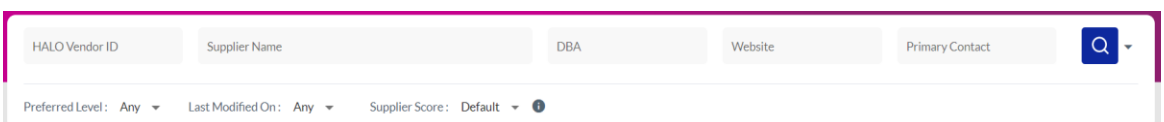
> Dear Supplier,
>
> Welcome to HALO's Supplier Portal!
>
> The Power to Break Through.
>
> This portal is designed to ensure all of the information we have on file is correct – 100% of the time. It will also help us communicate with key contacts within your organization with important supplier updates regarding the services HALO offers to our vendors. Registering on the Supplier Portal is easy and quick. Once registered, please use the portal to access a wealth of information regarding your supplier relationship with HALO.
>
> The Portal will allow HALO vendors to:
>
> - Update your contact information for all VIPs.
> - Make changes to your account.
> - Manage product information & update pricing.
> - View your invoice payment status & rebate accruals.
> - Sign up for HALO promotional opportunities, including trade shows and marketing programs.
>
> If you have any questions, please feel free to contact us at SupplierPortal@halo.com. We look forward to enhancing your HALO supplier experience and appreciate your continued partnership with HALO.
>
> Thank you,
>
> HALO Supplier Relations

Updating the Supplier Information

Even though Suppliers maintain their own information, the HALO SR Team can also make any necessary changes.

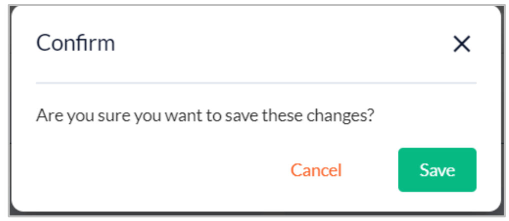


The checkboxes on the left of the screen do not appear until the search results display.

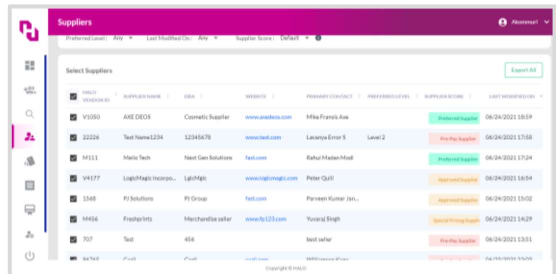
Step	Field Action	Screen Shot
1	**Hover over the left panel**, to display the names of the menu selections. (optional)	
2	Select the **Suppliers** option.	
		
	For definitions of the drop down Search fields, see steps 2 -6 in the **Review of the Supplier Setup**.	
3	Each screen is independent. Click the Edit (**Pencil)** button (upper right side of the screen) to enable and update the fields.	 will change to a  **Save** button.
4	If changes are made to the supplier information, click the **Save** button; otherwise, the updates will be lost.	 or 

5 Confirmation popup window displays:

- Click the **Save** button again**.**
- Click the **Cancel** button to disregard any changes. The system will not save the updated fields and navigates to the previous screen.
- A success popup window will briefly display in the upper right corner of the screen as notification that everything successfully updated.



6 The supplier portal will send an email with the summary of changes to Halo Supplier Relations, as well as the corresponding Supplier's primary contact.



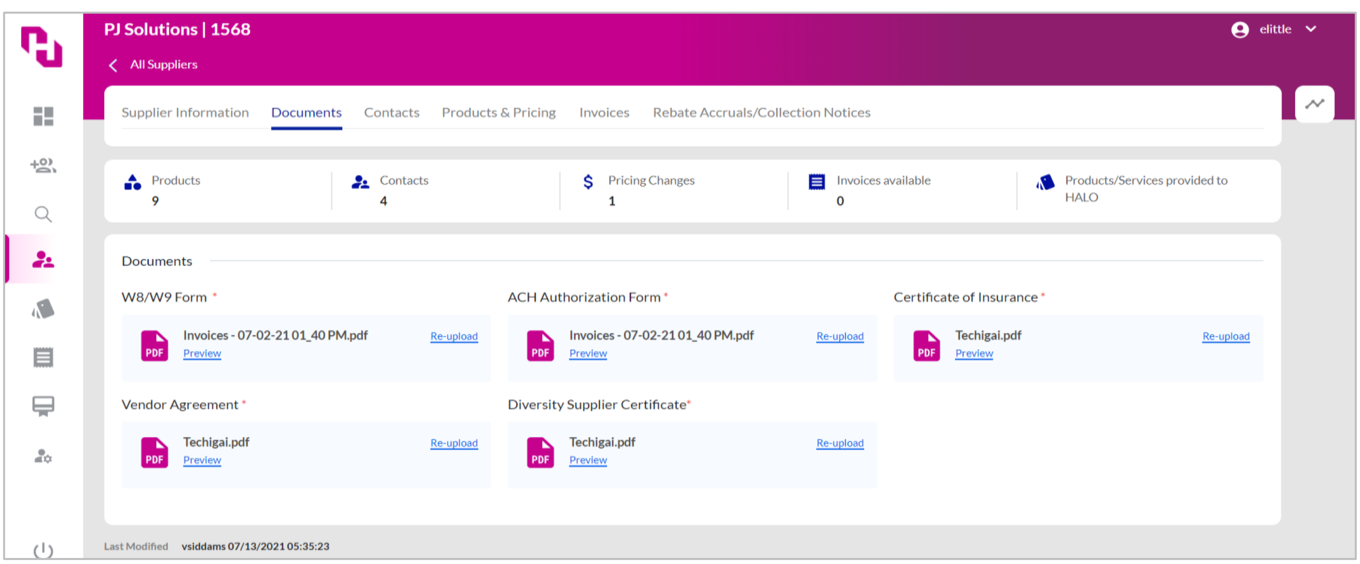
7 QUICK TIP

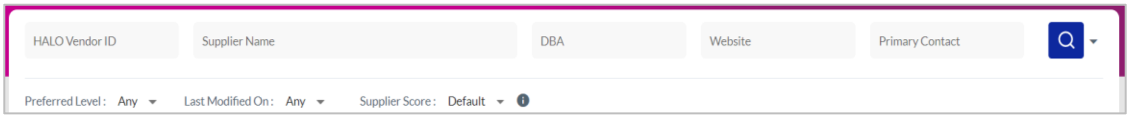
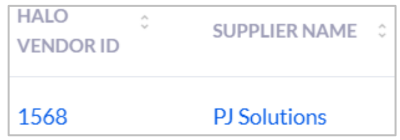
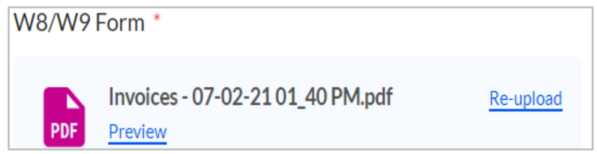
Useful buttons:

- **Clear Filters** button to clear the applied filters.
- **Next/Back** buttons to navigate through the checklist screens.

Logout button to close the HALO application (Located in the left panel)

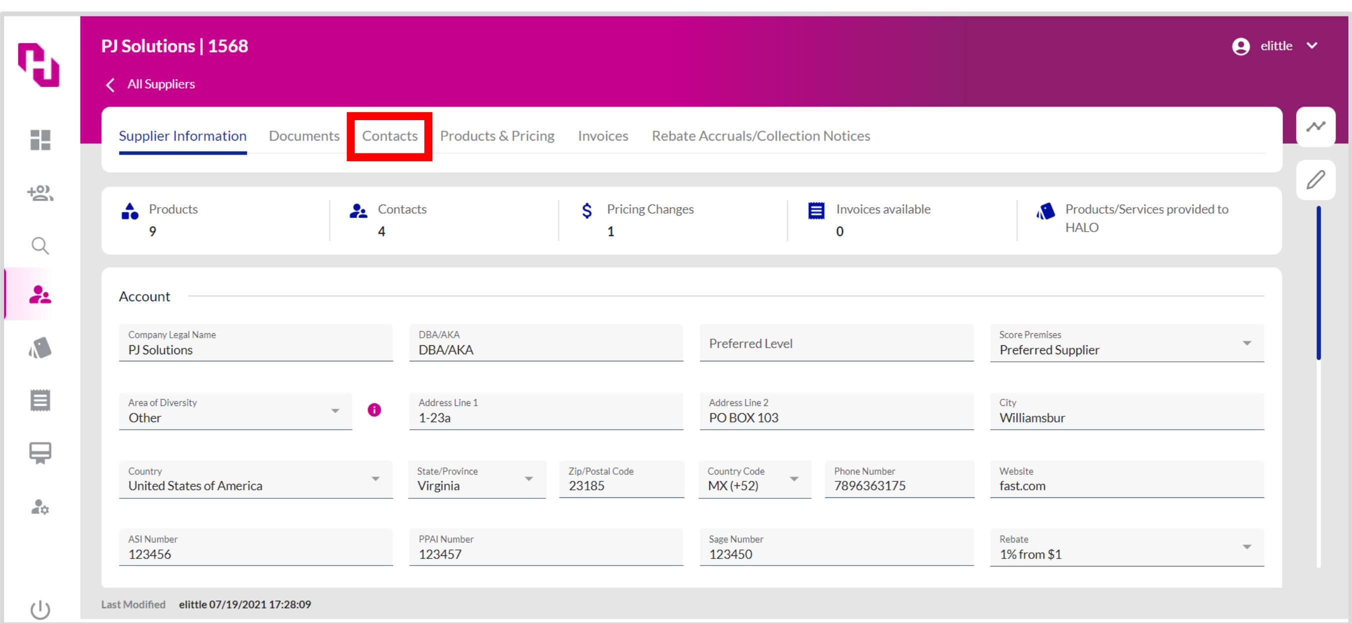
Documents



Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the names of the menu selections. (optional)	
2	Select the **Suppliers** option.	
NOTE	 For definitions of the drop down Search fields, see steps 2 -6 in the **Review of the Supplier Setup**.	
3	Click either the **HALO Vendor ID** or **the Supplier Name** link to display the Supplier information.	
4	▪ **Re-upload** link - allows a new PDF document to be loaded from your computer. ▪ **Preview link -** allows the document to display on the portal	
NOTE	▪ There are templates available for W9 or W8 forms and Vendor Agreements. ▪ The documents should only be in PDF format. ▪ If ACH has been checked on the Financial checklist screen, the ACH is mandatory. ▪ If the Area of Diversity field is entered, the Diversity Certificate is mandatory. ▪ The document upload is considered a Save function. (An exemption just for this screen).	

Contacts

Though the Suppliers maintain their own information, HALO SRs can make modifications to the contacts.

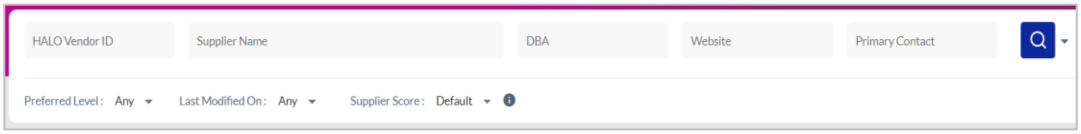


Step	Description/ Action	Details or Screen Shots

1

Hover over the left panel, to display the names of the menu options. Click the **Suppliers** button.

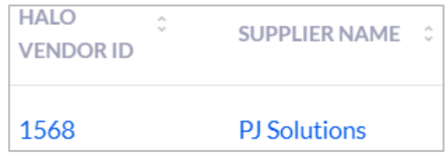
NOTE



For definitions of each drop down Search field, see steps 2 -6 in the **Review of the Supplier Setup** section.

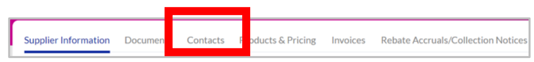
3

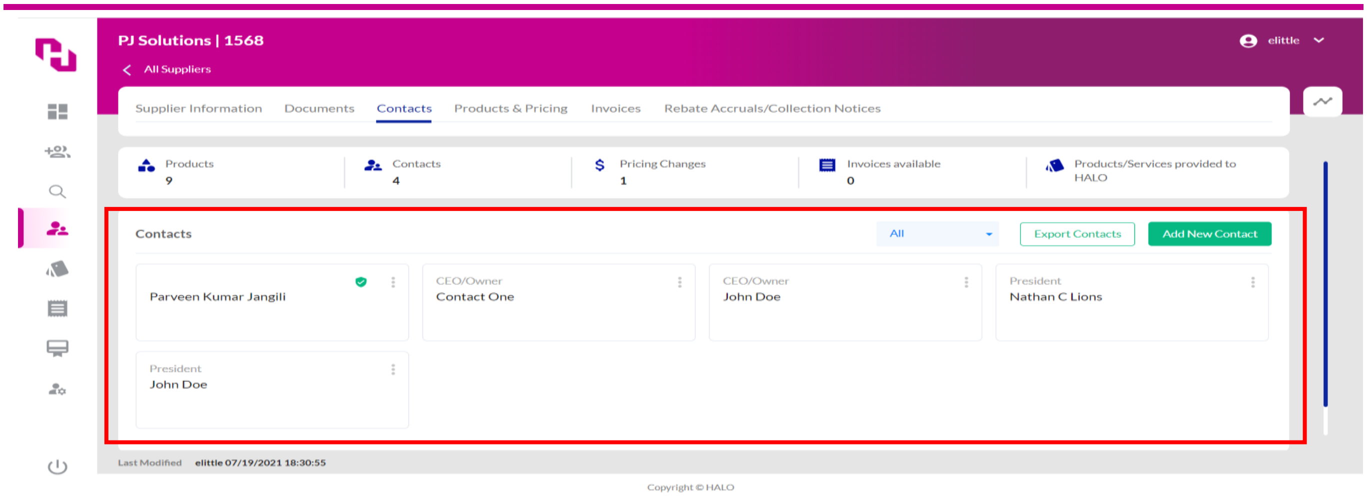
Click either the **HALO Vendor ID** or **the Supplier Name** link to display the Supplier information.



4

Click the **Contacts** button at the very top of the screen to reveal the contacts for the selected Supplier.





The **Contact cards** for the selected Supplier display on the screen.

Contacts are listed in order, which is based on their role. Use the **scroll bar** to display all the contacts.

.

Each **Contact card** contains information in the same order.

a. Primary Tag (First contact of the list)

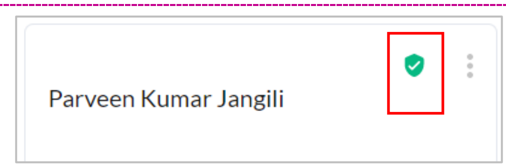
b. Role

c. Name of the contact

d. Region (Sales contacts) / Time Zone (Customer Service Contact)

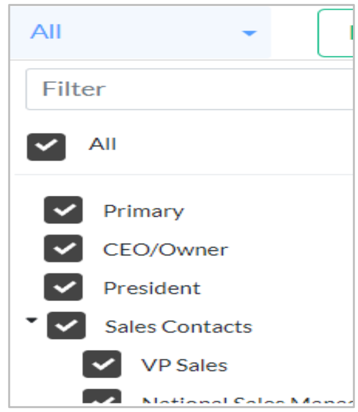
A **Primary Contact** is marked with a green shield and check mark.

A Primary Contact is the Supplier's main person to receive all communications.

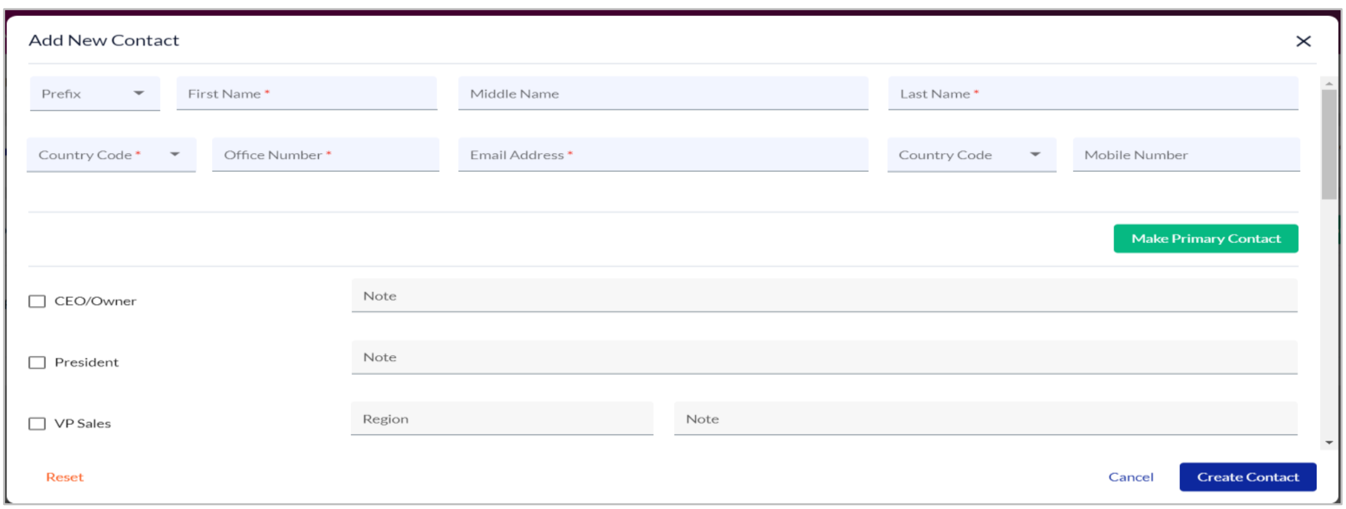


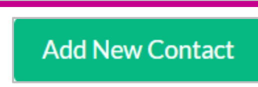
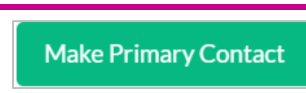
Each contact card is unique by the combination of Contact name and role.

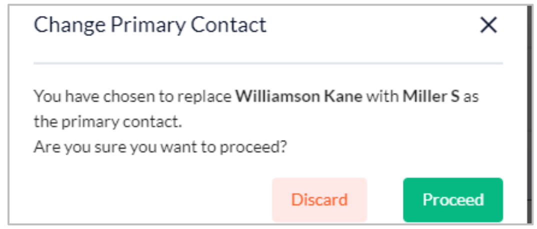
Clicking the **All** drop-down field allows the user to filter the Roles that are displayed on the Contract screen.



Add a New Contact



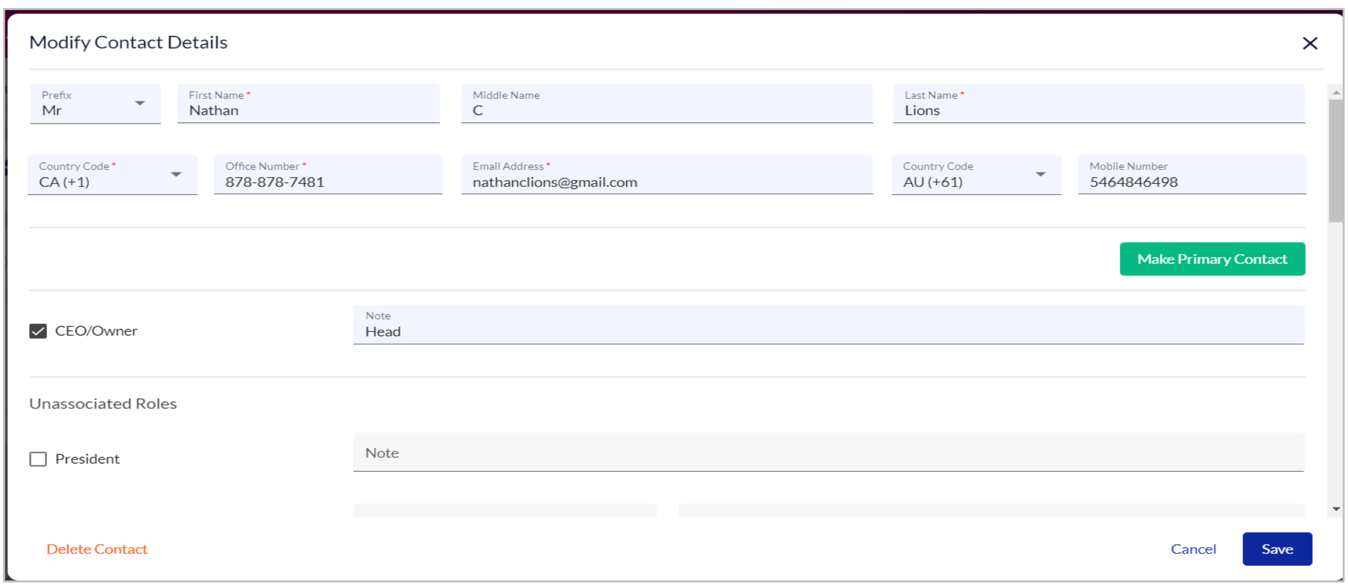
Step	Description/ Action	Details or Screen Shots
1	Click the **Add New Contact** button to add a new contact.	
2	Fill the mandatory fields marked with a red asterisk (*).	
3	Mark all the possible roles that need to be associated with the one contact.	 Remember to use the scrollbar to display all possible roles.
4	Click the **Make Primary Contact** to change this new contact to the primary.	

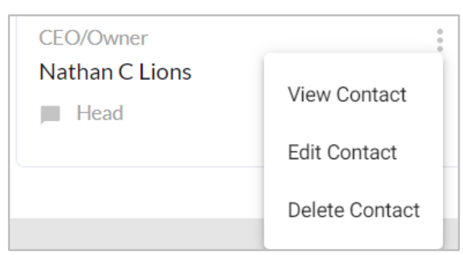
Step	Description/ Action	Details or Screen Shots
5	Only one contact is marked as primary. The primary contact does not have to be associated with any role. Click the **Proceed** button to change the new primary contact. Click the **Discard** button to cancel the update.	
6	When one contact has multiple roles, the system will create multiple contacts cards in the screen.	
7	Click the **Create Contact** button to add the new contact. Click the **Cancel** button to discard the new contact.	

NOTE

- Validation of the email address is used to avoid duplication of contacts.
- Any changes for contacts are communicated via an email to the corresponding Supplier and HALO Supplier Relations.

Modify an Existing Contact

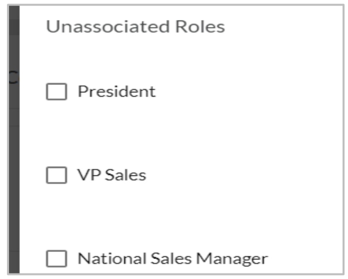


Step	Description/ Action	Details or Screen Shots
1	Modify an existing Contact by clicking the **Ellipsis ⋮ three dots** on the upper right of the contact card to reveal the **View, Edit** or **Delete Contact** option. QUICK TIP: This is one of several ways to navigate to the Contact Edit screen.	
2	Click the **Edit Contact** option to make any necessary changes.	

3

Each **Contact card** is unique by the combination of Contact name and role.

Add or change the role of the select contact. On the right side, the **Unassociated Roles** check boxes display. Here users can add a check mark to add new roles to the Contact.



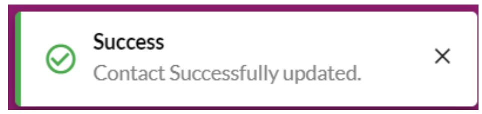
4

If changes are made to the supplier information, click the **Save** button; otherwise, the updates will be lost.

5

A **Success** popup window will briefly display in the upper right corner of the screen as notification that the Contact successfully updated.

Any Contact changes are communicated via an email to the corresponding Supplier and HALO Supplier Relations.



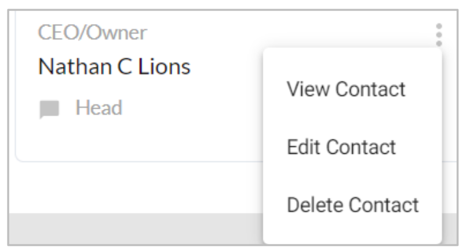
Delete a Contact

Step	Description/ Action	Details or Screen Shots

1

Modify an existing Contact by clicking the **Ellipsis ⁝** three dots on the upper right of the contact card to reveal the **View, Edit** or **Delete Contact** option.

This is only one of the ways to navigate to the Delete a Contact.



2

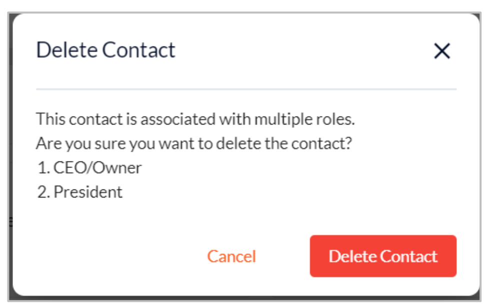
Click the **Delete Contact** option.

3

Click the **Delete Contact** button in the popup window.

If a contact contains multiple roles, all the roles will be deleted when the **Delete Contact** is clicked.

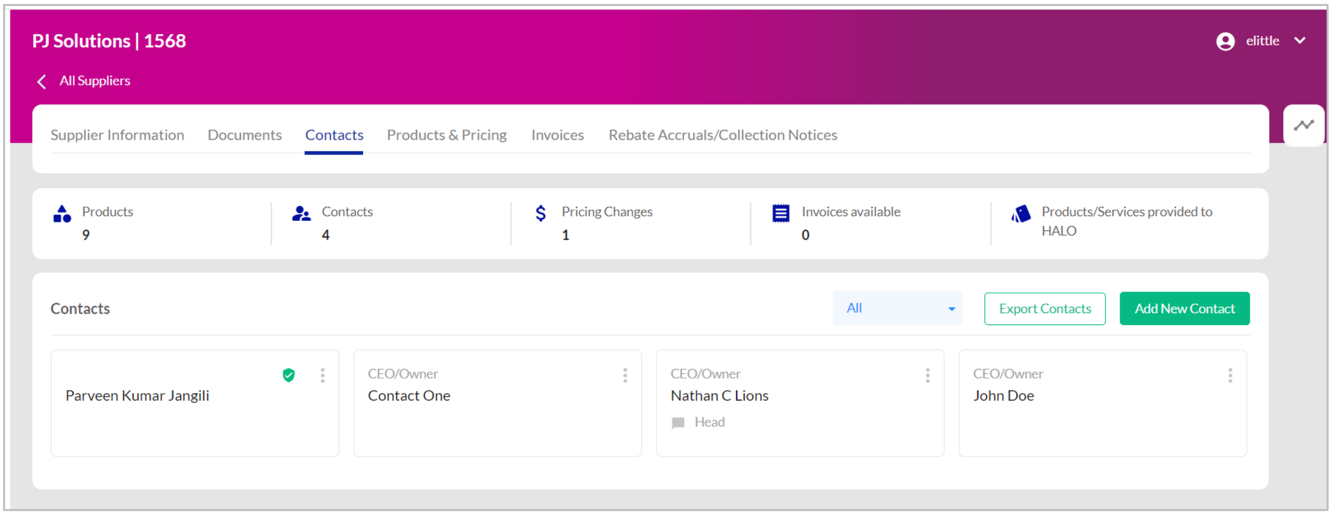
QUICK TIP: Click the **Cancel** button to discard any deletions.

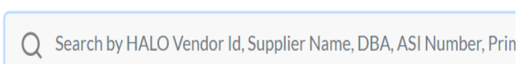
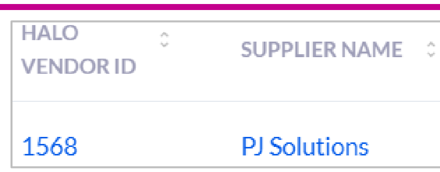


NOTE: Any changes for contacts are communicated via an email to the corresponding Supplier and HALO Supplier Relations.

Export Contacts

Users can Export all suppliers' contacts. Further, Primary Contacts can be exported if selected roles are missing.



Step	Field Action	Screen Shot
1	**Hover over the left panel**, to display the names of the menu options.	
2	Click the **Supplier** button to display the Select Suppliers screen.	
3	**Search for Suppliers** already on-boarded with the Supplier Portal using the search field. 	Search using the following: a. HALO Vendor ID b. Supplier Name c. DBA/AKA d. Website e. Primary Contact
4	Click either the **HALO Vendor ID** or **the Supplier Name** link.	
5	Select all contacts to export by clicking the **Export Contacts** button. (Upper right corner of the screen)	

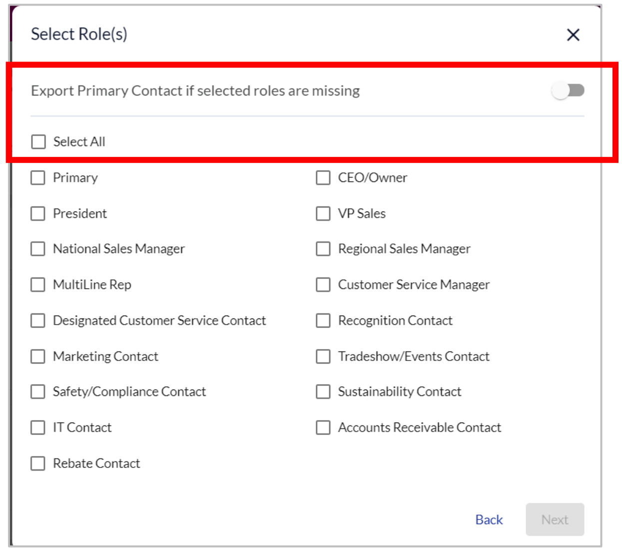
6

Select Roles popup window displays.

On the Select Roles to import popup screen, select:

- Slide bar to enable/disable the Export Primary Contact
- **Select All** roles to export (all boxes checked)
- **Individual roles** to export

QUICK TIP If selected roles are missing, turning on the **Export Primary Contact** feature will export the primary contact information.



7

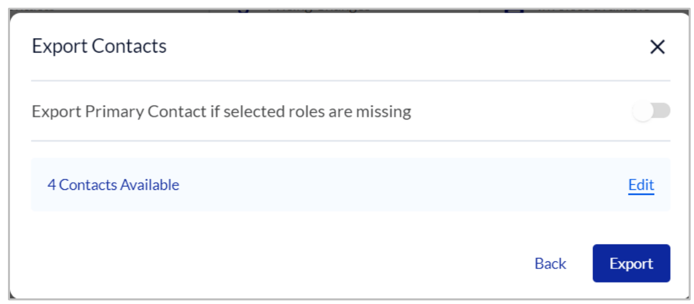
Click the **Next** button.

QUICK TIP Select at least one role and the next button will enable.

8

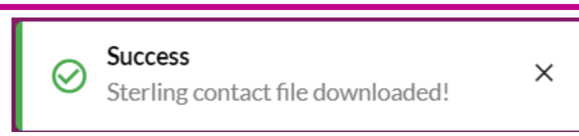
The Export Contacts popup screen provides the quantity of Contacts, and Roles that will be exported. It also displays if the Export/Primary contact setting is turned on or not.

Click the **Export** button to export the Excel Spreadsheet file to your computer.



9

A success popup window will briefly display in the upper right corner of the screen as notification that the Sterling Contact file downloaded!

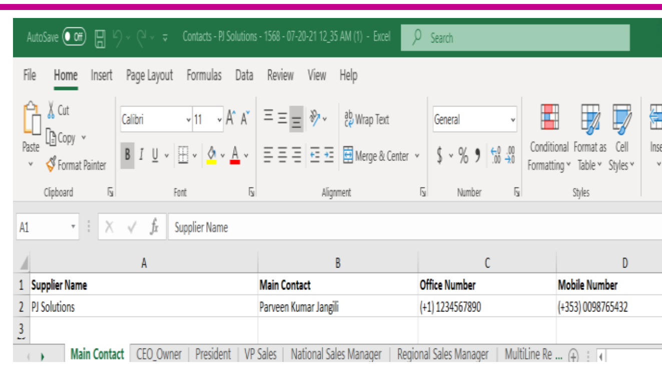


10

The Spreadsheet will be found in your default download folder.

Click to open the **Excel Spreadsheet** with all the selected supplier's information.

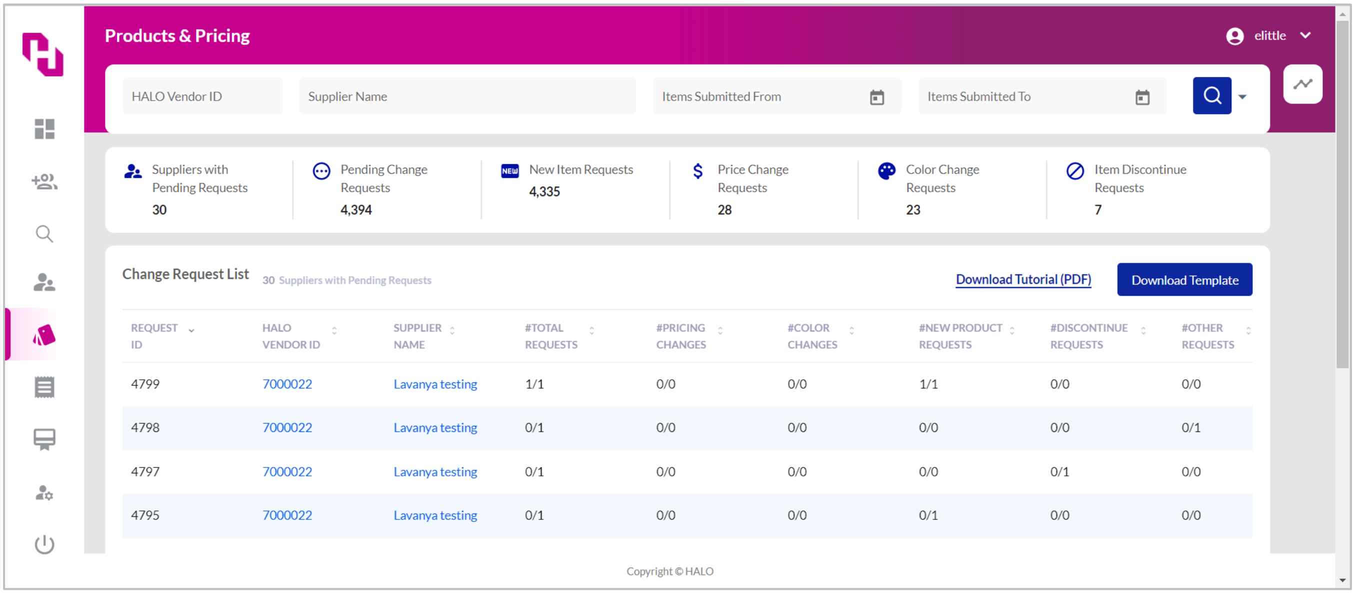
The spreadsheet has a tab for each possible role.



Product and Pricing

The Product and Pricing management module allows HALO Merchandising Team to manage the following:

- Supplier Relations review - approve and reject changes/requests made by Suppliers.
- Publish Products and pricing changes to other HALO systems.
- Reports with supplier products and pricing information.

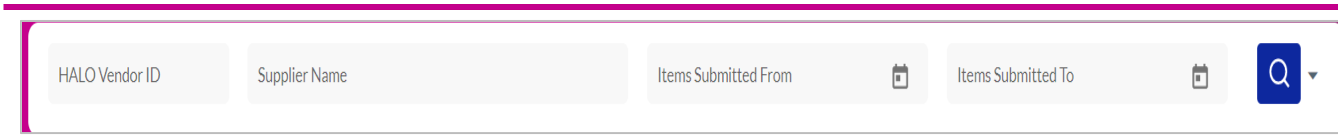


The Product & Pricing screen consist of three sections:

1. **Search fields** - Allows the search for the supplier upload instances.
2. **Summary Section** – Based on the Change List search results, this section provides the counts for Suppliers with Pending Requests, Pending Change Requests, New Item Requests, Price Change Requests, Color Change Requests, and Item Discontinue Requests.
3. **Change Request List** - The category of changes that need HALO team's approval are New Item Requests, Pricing Change Requests, Color Change Requests, and Discontinue Item Requests.

Search for Suppliers

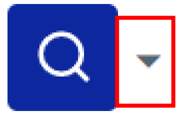
Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the names of the menu options.	
2	Click the **Product & Pricing** button to display the Select Suppliers screen.	



3

Search via the HALO Vendor ID, Supplier Name, Items Submitted From or Items Submitted To.

Click the down arrow (▼)to the right of **Search button** drop-down field to display the applied filters and the **Clear Filters** button.



Click the **Clear Filters** button to remove all the applied filters.

Matches will display in the main screen.

Based on the search criteria, the values on the column header are updated to match the search end results. (Total Invoices, Paid/Scheduled/On Hold).

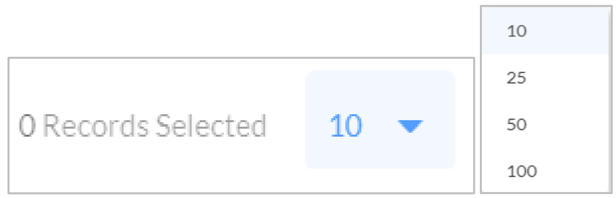
QUICK TIP

If there are no matches to the search criteria, an error message is displayed:

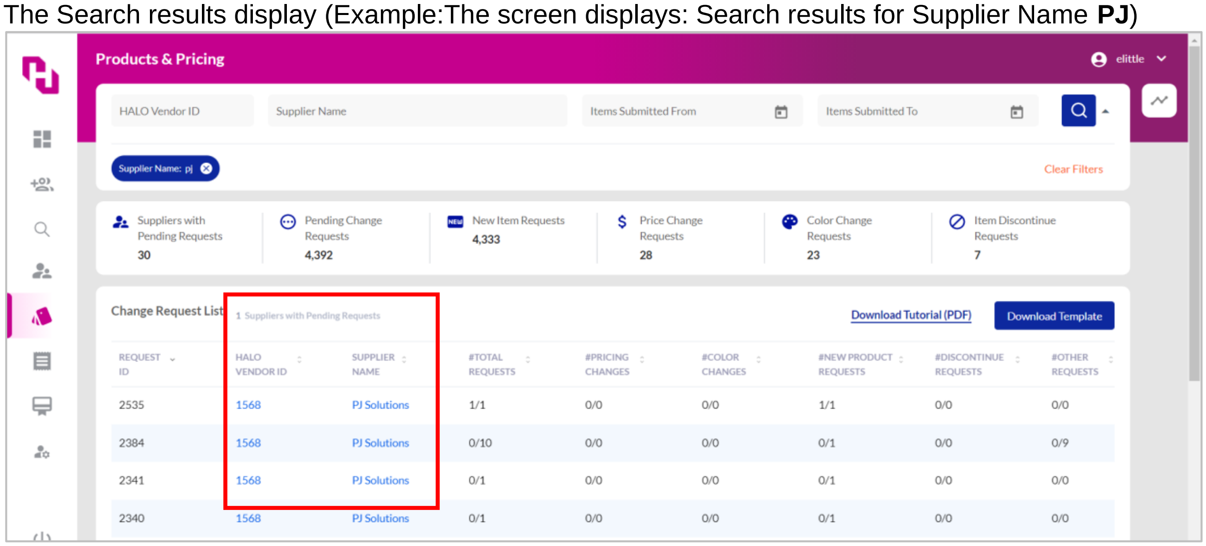
"No Supplier records are found using search Criteria".

4

Users can choose the **number of records to display per page**. The drop-down button is located at the bottom left of the screen. By default,10 will be displayed.



The Search results display (Example:The screen displays: Search results for Supplier Name **PJ**)

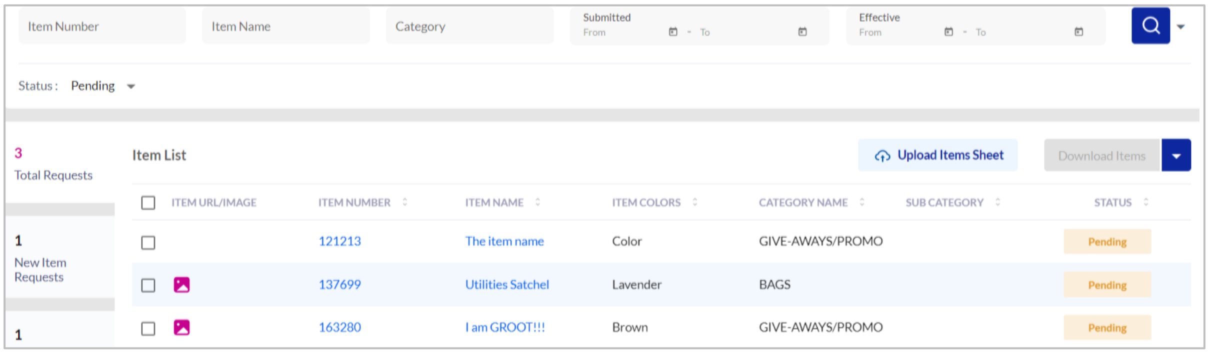


Search for Supplier Items

Step	Description/ Action	Details or Screen Shots

NOTE The **Search for Supplier Item** is a continuation from the Search for Suppliers.

1 Click the **HALO Vendor ID** or the **Supplier Name link** to display the Item List. (Displayed below)

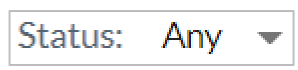


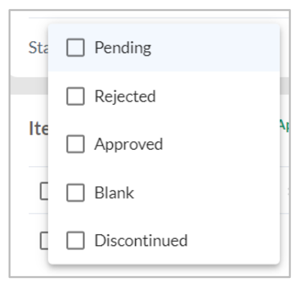
QUICK TIP The left side of the Item List screen displays the **Supplier Count for**: Total Requests, New Item Requests, Pricing Change Request, and Color Change Request

NOTE The Item List screen contains the following search fields to filter/narrow the search results: **Item Number, Item Name, Category, Submitted From – To, Effective From – To,** and **Status.**

2 Click the **Status** field for the search criteria. (optional) Suppliers can filter the status of products.

Click the **down arrow** (▼) to right of the **Status** field.



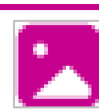


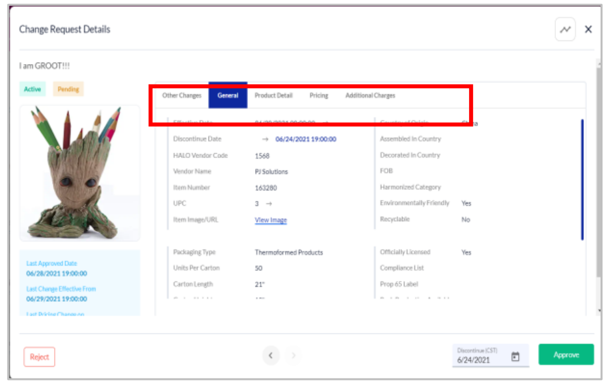
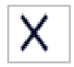
3 Click in the Status checkbox(es) to select the fields:

- **Pending –** Effective date when change was submitted.
- **Rejected –** Date and reason why a price change was rejected by HALO.
- **Approved –** Date a change was approved.
- **Blank –** Changes have not been requested for this product.
- **Discontinued –** Effective date the product is no longer sold.

4 After the search criteria has been entered or selected, click the **Search** button.

5 Click the **Image** button to display a picture of the item for that line. This is linked to the Supplier's website. (Displays after selecting the Supplier to review)

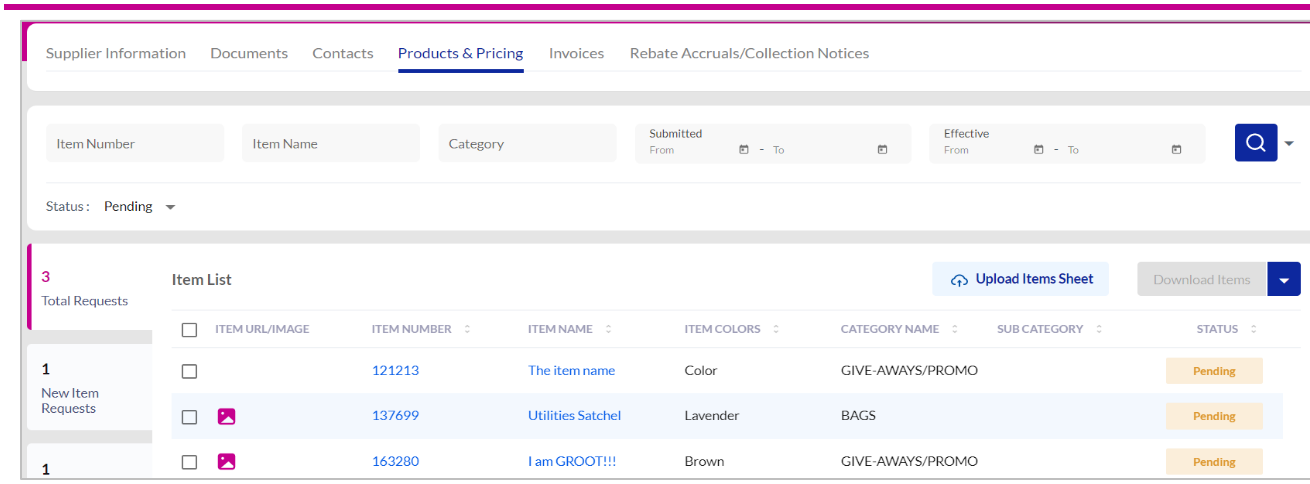


6	Click the **Item number** or **Item name** to display a popup screen with item details. The item details are classified under **multiple tabs** – General Information, Product Details, Pricing, and Additional Charges.	
7	If the **Approve** or **Reject** button is not selected, click the **X** (upper right corner) to **Close** the popup window.	
8	Once on the Item List screen, click the **All Products & Pricing** button (top left of the screen) to return to the **Change Request List** screen.	

Download Item Sheet to Update Information

Users can download and save existing products into a spreadsheet on to a computer. As necessary, Suppliers can make updates to the existing product and/or adding new products.

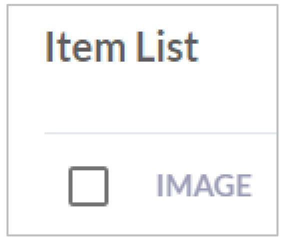
Step	Description/ Action	Details or Screen Shots
NOTE	**Download Tutorial** is step-by-step guide for the Supplier to help using the Products and Pricing screen.	Download Tutorial (PDF)
1	Begin by navigating to the **Supplier Item List.**	Use the steps in Search for Suppliers and then Search for Supplier Items to navigate to the Supplier Item List screen.



2	Once on the Supplier Item List, search for the product(s). The search criteria options are **Item Number, Item Name, Description, Category, and Status**.

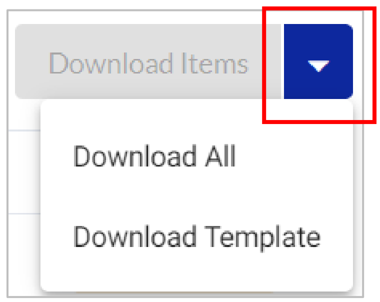
3 After the search criteria has been entered or selected, click the **Search** button.

4 **Select all / Deselect all** Item records in the header section. The check box is located to the left side of the screen next to the Image header.



- Enter a **check mark** in the box to select all the Item records.
- A **line** in the check box means that individual items were selected.
- An **empty check box** means that no items have been selected.

5 Select one of the following Spreadsheets to input Item changes:



Download Items button will download only selected records into a spreadsheet.

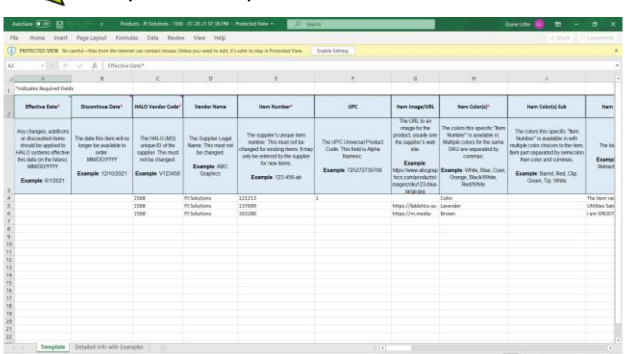
Click the **down arrow** (▼) to right of the Download Items field to select:

Download All option will download all records into a spreadsheet. Follow the instructions. (XLSX Format).

Download Template is a blank product spreadsheet containing all the headers for entering data manually for uploading to the HALO system.

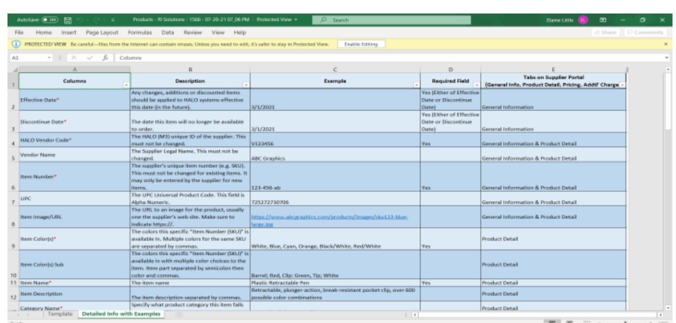
QUICK TIP

The **Template** worksheet is where users input their updated to or new items.



QUICK TIP

The **Detailed Info with Examples** worksheet provides definitions and examples for each column on the Template worksheet.



6 In the first columns of the spreadsheet, enter the **Effective** or **Discontinue Date** that the change is to become live in the HALO portal.

If an **Effective or Discontinue Date is not entered**, the row will be ignored. Entering an effective/go live date, the system will review the row for changes (based on Item Number).

Effective Date*	Discontinue Date*
Any changes, additions or discounted items should be applied to HALO systems effective this date (in the future).	The date this item will no longer be available to order.

Users can fill in **both the Effective Date** and **Discontinue Date** (Discontinue date is later than Effective Date) for that the product is active for a limited period.

Discontinuing a product. Users must specify the date that this product will be discontinued in the Discontinued Date column.

7 Modify any existing product by changing the existing row of information.

8 Add a new product by adding a new row in this spreadsheet.

Any modifications to the upload template will cause the upload to be rejected:

- Price breaks must be clearly defined.
- Do not change Item Numbers in the spreadsheet.
- Do not change the order of columns.
- Do not add or remove a column.
- Do not leave empty rows between products.
- Do not duplicate records.

9 Once the updates and reviews have been made and saved on the spreadsheet, upload the requested changes to the HALO portal.

For directions, go to **Uploading Template to HALO Portal** section of this document.

Using a Blank Template Item Sheet

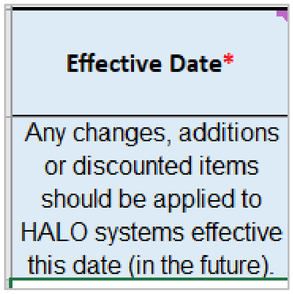
If a suppler only needs to add new products to the portal, they can download and use a blank template to input the information.

Step	Description/ Action	Details or Screen Shots
1	**Download Template** – is a blank product spreadsheet containing all the headers for entering data manually for uploading to the HALO system.	Download Template Master Products Template_9Jul21.xlsx
2	Any modifications to the template will cause the upload to be rejected. The second spreadsheet tab, **Detailed Info with Samples** provides column information like definitions and sample values.	▪ Do not change the order of columns. ▪ Do not add or remove a column. ▪ Do not leave empty rows between products. ▪ Do not duplicate records.

3

In the first column of the spreadsheet, **enter the effective** new product to become live in the HALO portal.

If an **effective date <u>is not entered</u>**, the row will be ignored. By specifying the effective/go live date, the system will review the row for changes and/or a new product entry (based on Item Number).



4

For **new products that are like current products**, you must enter the new Item Number.

To save time, with similar items to be added:

- **Copy** the current line of the item that is already in the system.
- Make the necessary changes to the line (like size or color).
- Change the item number for the copied. Each line must be unique for each product.
- **If you use the same Item Number multiple times, the system will not recognize the change.**

QUICK TIP

For an item with multiple sizes and colors:

- Each size must have a different Item Number.
- Each color must have a different Item number.
- Each color and size must be on separate lines.

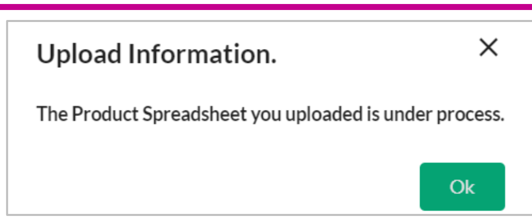
5

Once the updates and reviews have been made and saved on the spreadsheet, upload your requested changes to the portal.

For directions, go to [Uploading Template to HALO Portal] section of this document.

Upload Template to HALO Portal

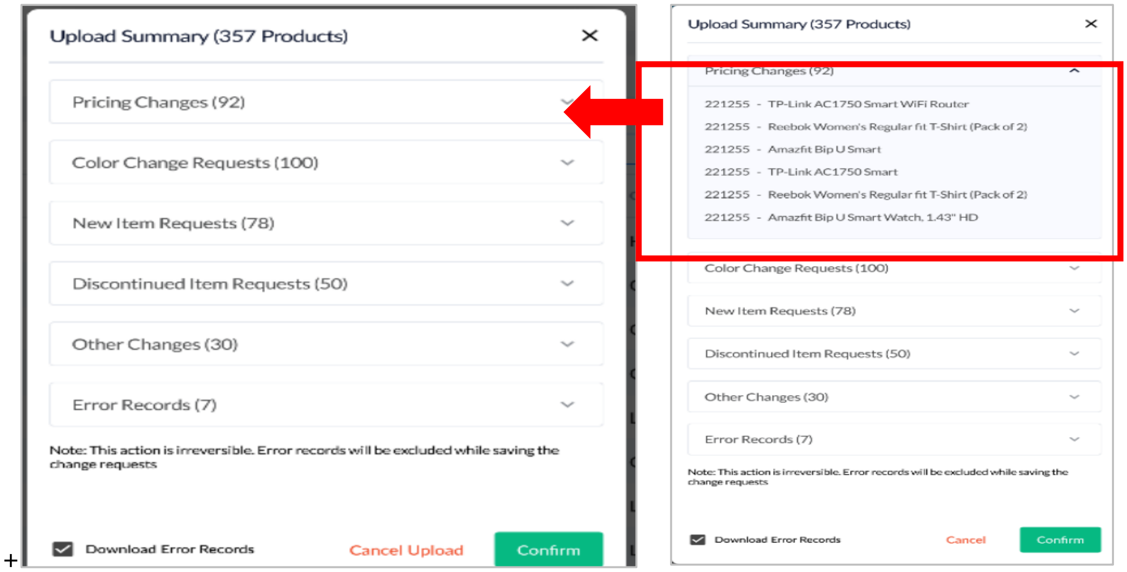
Users download those products as a spreadsheet or use the blank Template spreadsheet. The spreadsheet will include all current information, including links to images, product descriptions and pricing. The only upload format is XLSX or XLS.

Step	Description/ Action	Details or Screen Shots
1	After filling in the spreadsheet, upload it on the portal and follow the prompts to upload the spreadsheet. NOTE Supplier is not allowed to upload another spreadsheet while one is in process. **The Upload Items Sheet button is disabled for that Supplier.**	 **Only XLSX or XLS formats are allowed!** All other uploaded formats display the error message “Invalid file format! 
2	A pop-up window displays briefly letting you know the upload is under process. Click **OK.**	

3	NOTE	Each item change needs to be processed by **HALO SR team to either approve or reject**. HALO SR Team may contact you for further clarification regarding the requested change.

Item Upload Confirmation Screen

Once the spreadsheet is uploaded to the portal by the Supplier, the product upload confirmation screen pops-up.



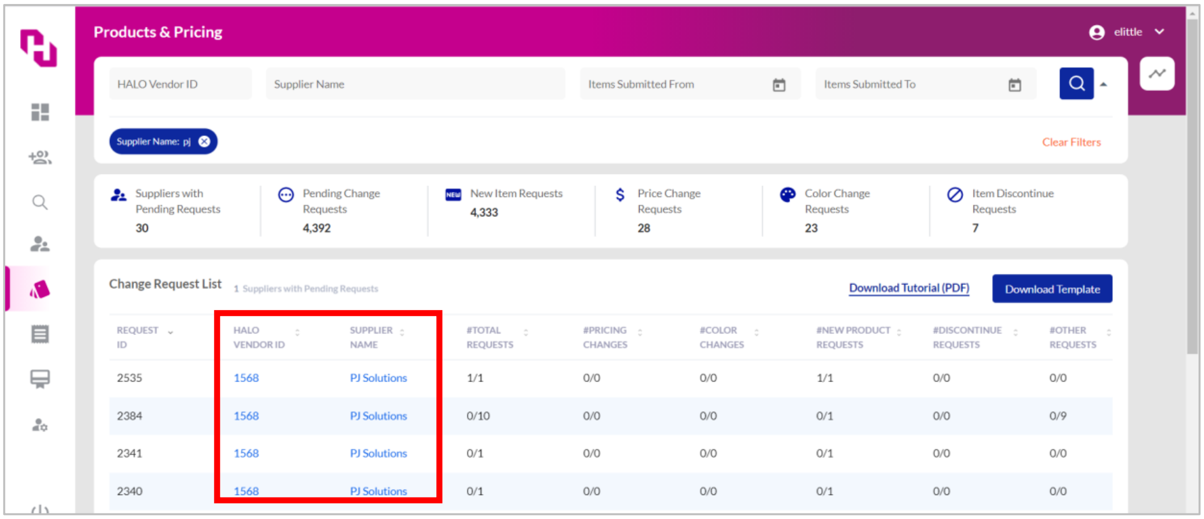
Step	Description/ Action	Details or Screen Shots
1	The Supplier Portal will prompt you to **confirm the upload**. Please review the upload for errors. ▪ The Item Upload Confirmation Screen pop-up indicates "This action is irreversible. Error records will be excluded while saving the change requests". ▪ Submittal of new products only, the pop-up details provide the number of new products and errors/wrong data.	The **upload Item spreadsheet summary** popup window contains the following information: a. Number of new products submitted for approval. b. Number of Items with changes (Not Pricing – Other Changes). c. Number of items with Pricing changes. d. Number of Color Change Requests. e. Number of items to be discontinued. f. Number of errors/wrong data type records (Not to be confused with no effective date records – which are no changes at all).
2	**Download Error records** checkbox (by default is checked). ▪ The first sheet in the spreadsheet will contain the list of error records. ▪ The second sheet will have the reasons for being marked as errors.	 QUICK TIP The Errors will download whether the Supplier chooses to Cancel Upload or Confirm.
3	Suppliers can choose to **Confirm** or **Cancel Upload** the changes from the uploaded spreadsheet.	

4	▪ After the confirmation by the Suppliers, the product/item changes will be recorded with timestamp (import). ▪ The saved item records are marked as **pending** with a proposed effective date.

Manage a Change Request Screen

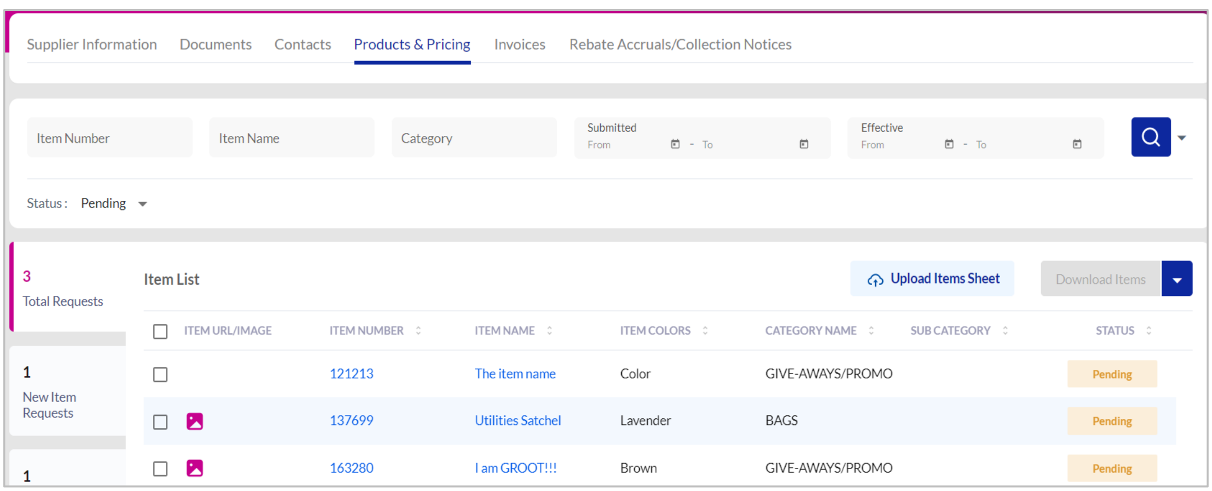
Steps	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the names of the menu options.	
2	Click the **Product & Pricing** button to display the Select Suppliers screen.	

3 Click the **HALO Vendor ID** or the **Supplier Name link** to display the Item List. (Displayed below)



QUICK TIP: For specific Items, use the steps in Search for Suppliers and then Search for Supplier Items to navigate to the Supplier Item List screen.

The **Supplier Item List** displays.



4

Once on the Supplier Item List, search for the product(s). The search criteria options are **Item Number, Item Name, Description, Category, and Status**.

5

Each item will have one status, which is crucial for the changes submitted:

a. **Blank** – When no changes have been requested to this product.

b. **Pending** – When a change was submitted. (It is accompanied by Effective date)

c. **Rejected** – When a price change is rejected by HALO. It is accompanied by the date of rejection and reason of rejection.

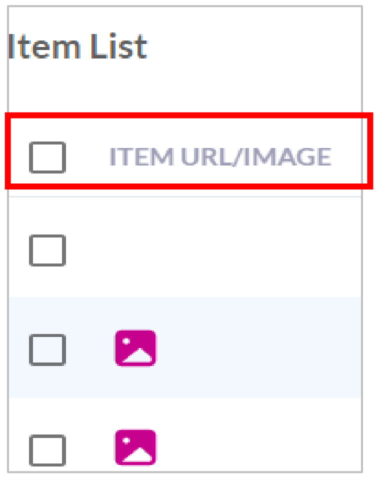
d. **Approved** – When a change is approved. It can be accompanied by an effective date and this can also be a price change.

6

Select all / Deselect all Item records in the header section. The check box is located to the left side of the screen next to the Image header.

- Enter a **check mark** in the box to select all the Item records.
- A **line** in the check box means that individual items were selected.

An **empty check box** means that no items have been selected.



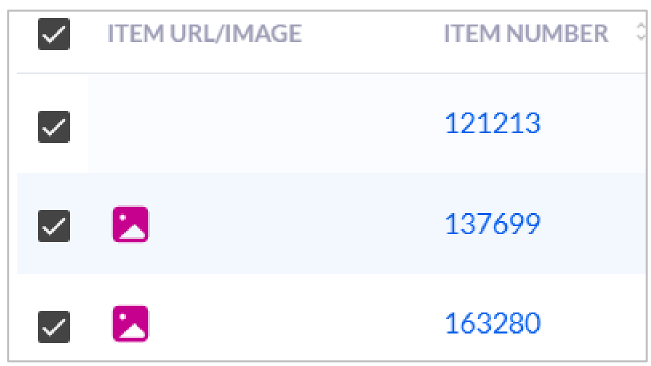
7

Users can select multiple items by

- Clicking the check box (next to the Item URL/Image header) to **Select All** the line items

OR

- Clicking the check box next to **specific line item** to select them individually.



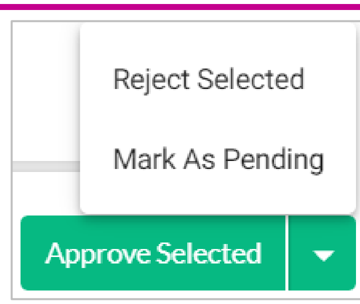
8

Bulk Process is to select multiple line items and approve, reject, or mark as pending (undo approve/reject).

- Approved Selected

Click the **down arrow** () to right of the Approved Selected field to select:

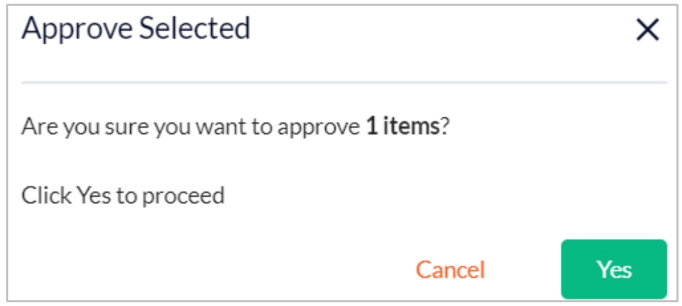
- Reject Selected
- Mark As Pending



9

A popup window displays with the quantity of items you are Approving, Pending or Rejecting.

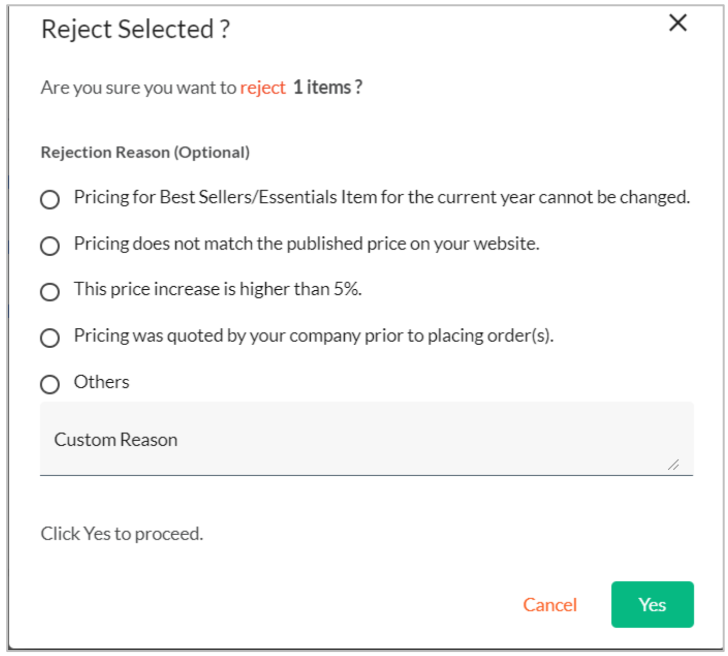
- Click the **Yes** button to proceed
- Click the **Cancel** button to disregard the changes.



10

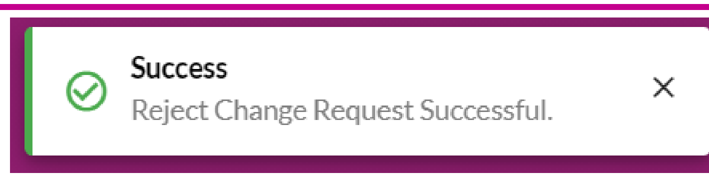
When **Rejected** is selected, the popup window provides options for the reason for rejecting the change

If **Others** is selected the user can enter a custom reason for the rejection.



11

A success popup window will briefly display in the upper right corner of the screen as notification that the items were **Approved, Pending or Rejected**.

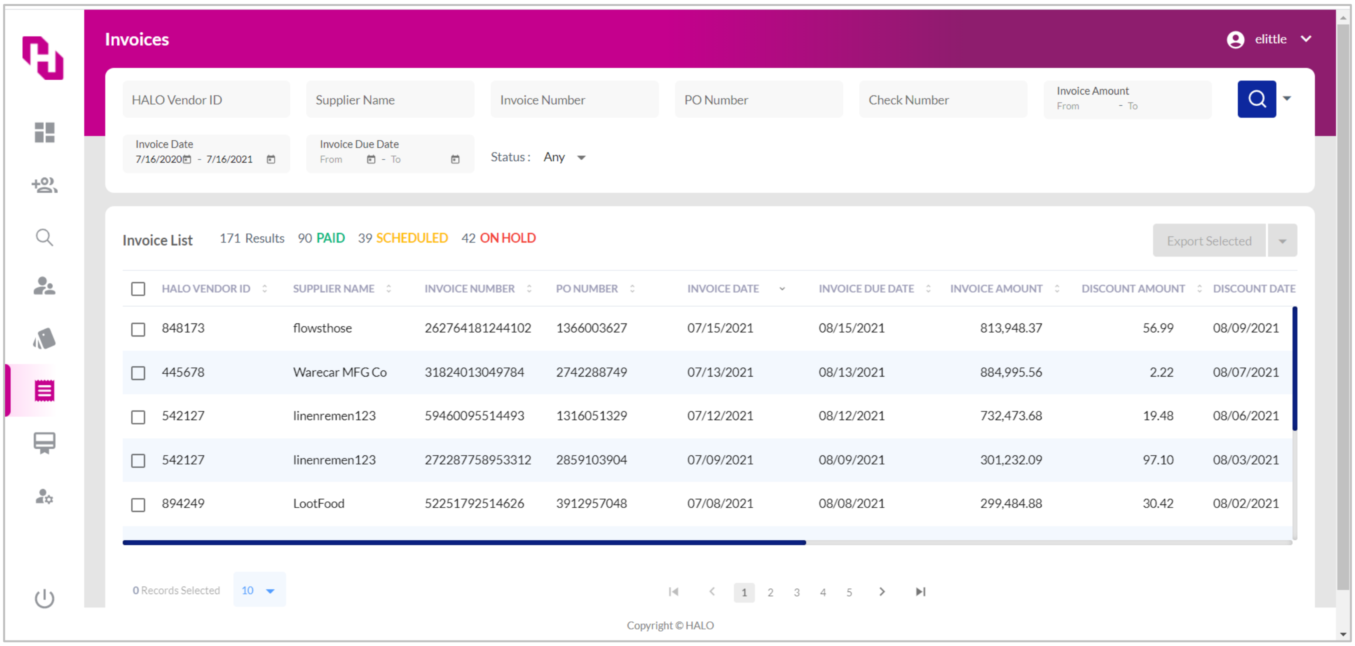


HALO SR Sends Email Product Change Requests

Step	Description/ Action	Details or Screen Shots
Suppliers chose to **confirm** the changes from the spreadsheet upload**.**		
1	After HALO has reviewed the request(s), an email with the actions taken for the changes will be sent to the **Primary Contact listed** in HALO's Supplier Portal.	
2	HALO SR sends the Supplier an email including the status of the Items from the spreadsheet. (Similar to the Product Upload Confirmation Screen) Also, the email provides the confirmation of the upload on the portal to complete the process.	a. In the subject line enter "Item Change Requests - ()". b. The email needs to contain a summary of the Item spreadsheet upload performed and confirmed. c. The email also will contain the error records spreadsheet with one sheet listing the error records and other sheet detailing the reasons for errors (with Item Number for reference).
3	Approved changes will be migrated to the appropriate HALO portal(s) based on the agreed upon effective/go live date.	
	NOTE **At the end of each day, a summary of all approvals is sent via email.** For each Supplier, a single email is sent to the Supplier and to HALO Merchandising summarizing their approvals or rejections for the day. A link to the portal is also included. ▪ **Pending Items** - The list of items that were not processed are sent as an email to HALO Merchandising team as a reminder. ▪ **Approved Items** - One day prior to items going live (Effective Day), the list of items with other details is sent as a spreadsheet attachment via an email.	

Invoices

HALO Users can search for, review, and export invoices of the supplier.



Description/ Action

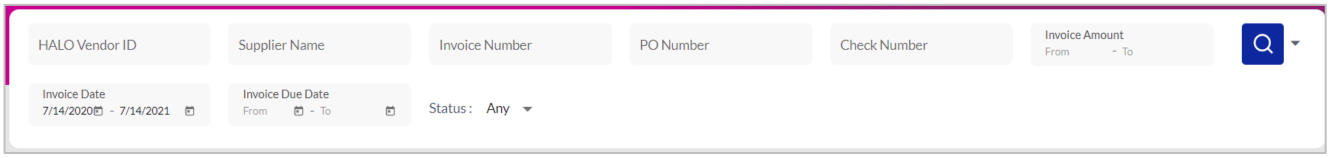
The Invoice screen has three sections:

1. **Search** – Allows for searching for all suppliers that are unpaid, along with those invoices that were paid from past twelve months.
2. **Summary** – Based on the search criteria, the summary section displays a count of the Invoice Results, Paid, Scheduled, and On Hold.
3. **Invoice List table** – Based on the search criteria, this table displays all the Suppliers Invoices.

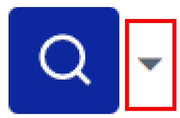
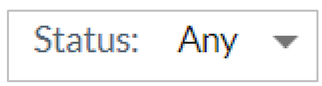
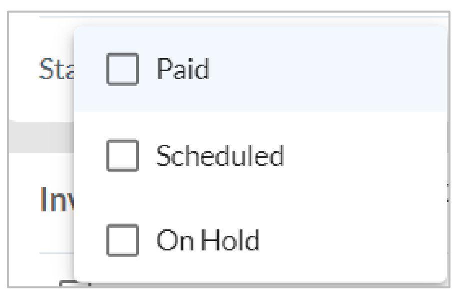
- The application allows the HALO users to view all the invoices at one place.
- The screen displays Invoices that are unpaid or those that are paid within the past twelve months.
- The Invoices screen is for Accounts Payable and is **not related to rebates**.
- Most of the Invoice information is transported from the M3 system.
- Invoices are sorted by date with the latest first.
- Check numbers may be blank, even if the status is Paid with a Paid date.
  - This indicates that the payment was not made through check and might have been through ACH.
- An Invoice Number is not unique. A single invoice number can be accompanied with different PO Numbers.

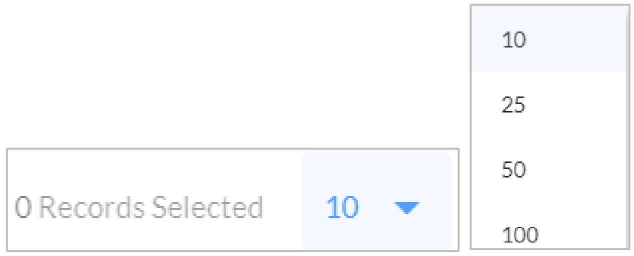
Search for Invoices

Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the names of the menu options. Click the **Invoices** option from the left panel.	

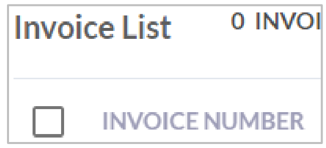
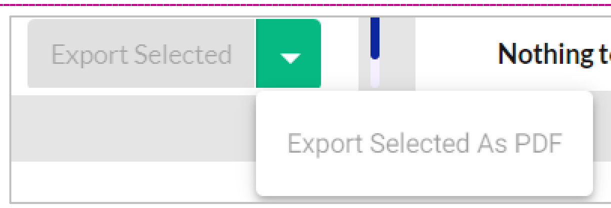


NOTE The Invoices screen displays the Vendor ID, Supplier Name, Invoice Number, PO Number, Invoice Date, Invoice Due Date, Invoice Amount, Discount Amount, Discount Date, Paid Date, Check Number, Status, Voucher Code, Remarks.

Step	Description/ Action	Details or Screen Shots
2	**Search** via the Vendor ID, Supplier Name, Invoice Number, PO Number, Invoice Date, Invoice Due Date or Status. After the search criteria has been entered or selected, click the **Search** button. Click the down arrow ( )to the right of **Search button** drop-down field to display the applied filters and the **Clear Filters** button.	  Click the **Clear Filters** button to remove all the applied filters.
3	Click the **Status** for search criteria. (optional). Suppliers can filter the status of invoices. ▪ Click the down arrow ( ) available just to right of Status field. ▪ Click in the checkbox(es) to select the fields from below: a. Paid b. Scheduled c. On Hold	 
4	After the search criteria is complete, click the **Search** button (magnifying glass) to return the search results.	
	Matches will display on the main screen. Based on the search criteria, the values on the column header are updated to match the search end results. (Total Invoices, Paid/Scheduled/On Hold)	**QUICK TIP** If there are no matches to the search criteria, an error message briefly displays: “No supplier records are found using search Criteria”.

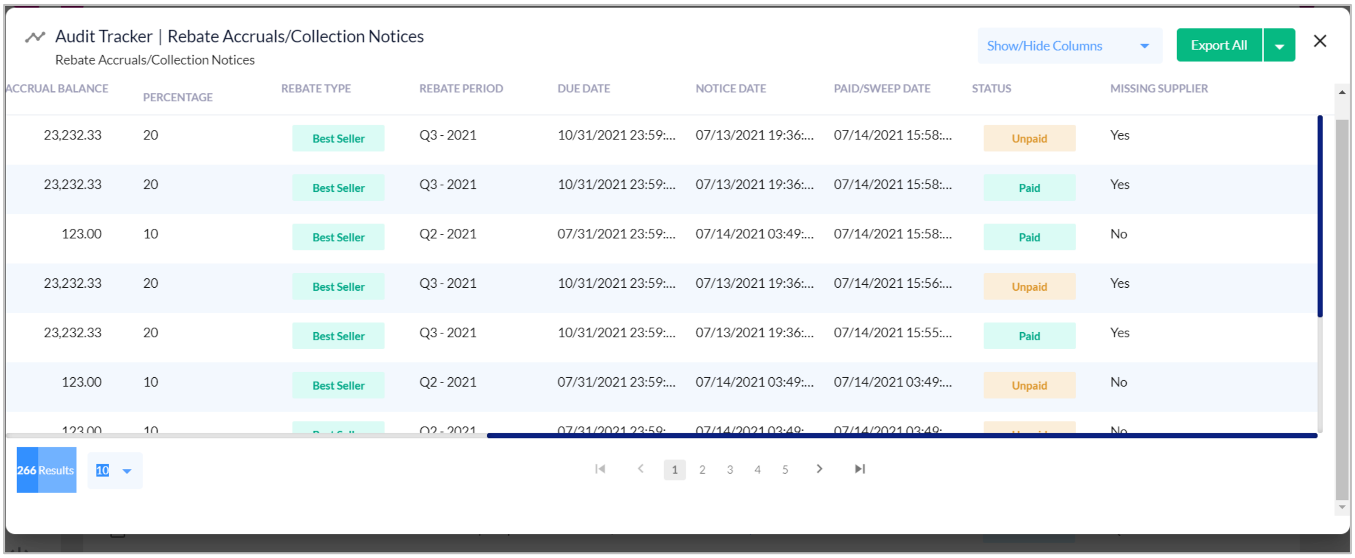
5	You can choose the **number of records to display per page**. The drop-down button is located at the bottom left of the screen. By default,10 will be displayed.	

Export Invoices

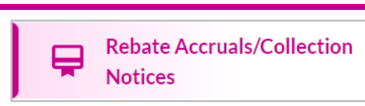
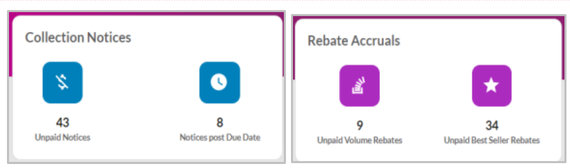
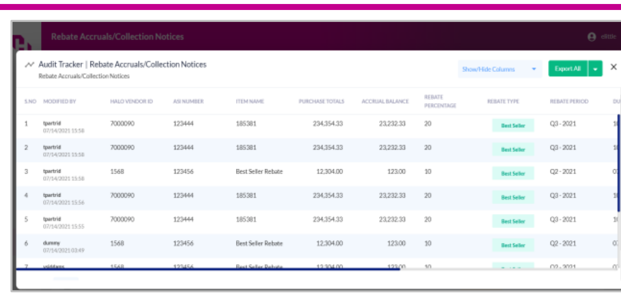
Step	Description/ Action	Details or Screen Shots
1	**Select all / Deselect all** the Invoice records header section. The check box is located to the left side of the screen next to the Invoice Number header.	 A **check mark** in the box signifies that all Invoice records are selected. A **line** in the check box signifies that individual Invoice records are selected. An **empty check box** signifies that none of the invoice records are selected.
2	**Click in the box beside individual invoices** to add a check in the box to select it.	You can also use the check box in the header to select all the invoices displayed.
3	Click the **Export Selected** button. ▪ Export to Excel by default. ▪ To choose PDF format click the **drop-down** ▾ **arrow** and Click **Export Selected As PDF**.	

Audit Tracker

Users need to utilize the Audit tracker to export all the audit history information.



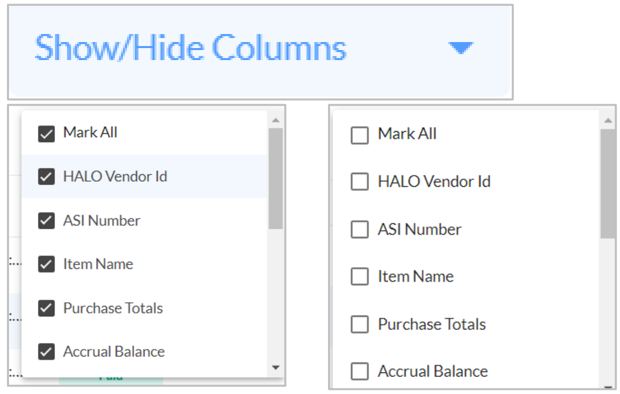
- Upon clicking the audit tracker button, the user navigates to an audit screen that displays all the changes (history) made on each screen for each supplier.
- The audit elements include: Vendor ID, ASI Number, Item Name, Purchase Totals, Accrual Balance, Rebate Percentage, Rebate Type, Rebate Period, Due Date, Notice Date, Paid/Sweep Date, Status and Missing Supplier along with the last modified time.

Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the menu options. (Optional)	
2	Click the **Rebate Accruals / Collection Notices** button.	
	 On the dashboard, the Audit Tracker button can also be found by clicking the **Collection Notices** or **Rebate Accruals** cards.	
3	Click the **Audit Tracker** button, which is located in the upper right -hand corner of the screen.	
4	The Audit Tracker screen displays.	

5

Users can show or hide the columns.

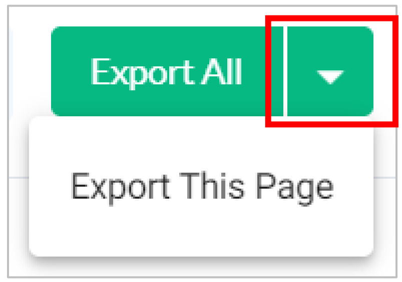
- Click the **Show/Hide Columns** ▾ button located on the upper right side of the Audit screen.
- The **Mark All** checkbox allows you to automatically check (show) or uncheck (hide) all the column check box fields at one time.
- Each of the column check boxes can also be individually checked (show) or unchecked (hide).



6

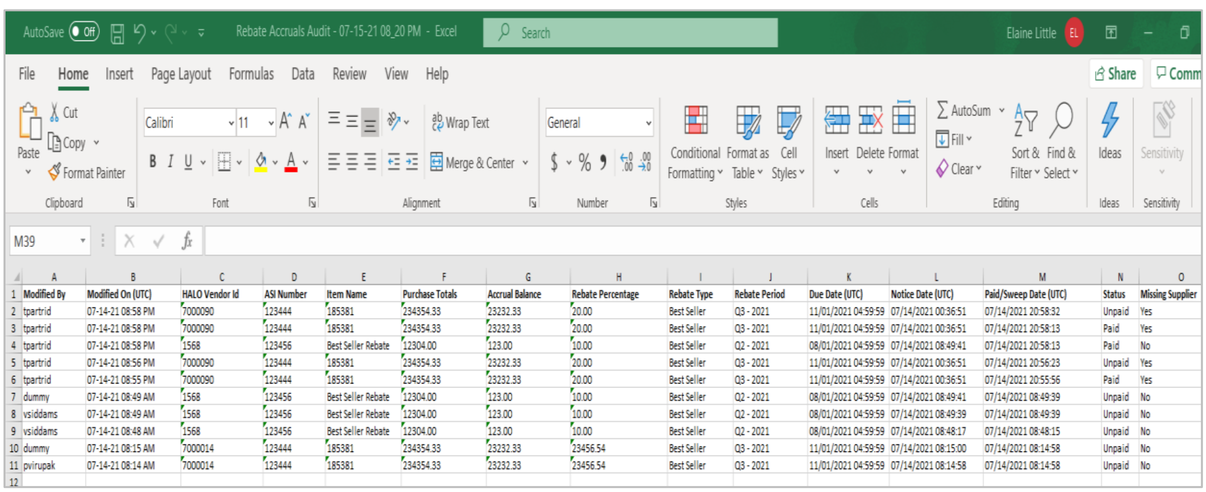
Click the **Export All** button in the Audit tracker to automatically export all the audit information matching the search criteria entered to an Excel spreadsheet on to the computer.

Click the **Export All** drop-down ▾ arrow and click **Export This Page** to automatically export the current information displaying to an Excel spreadsheet on to your computer.



7

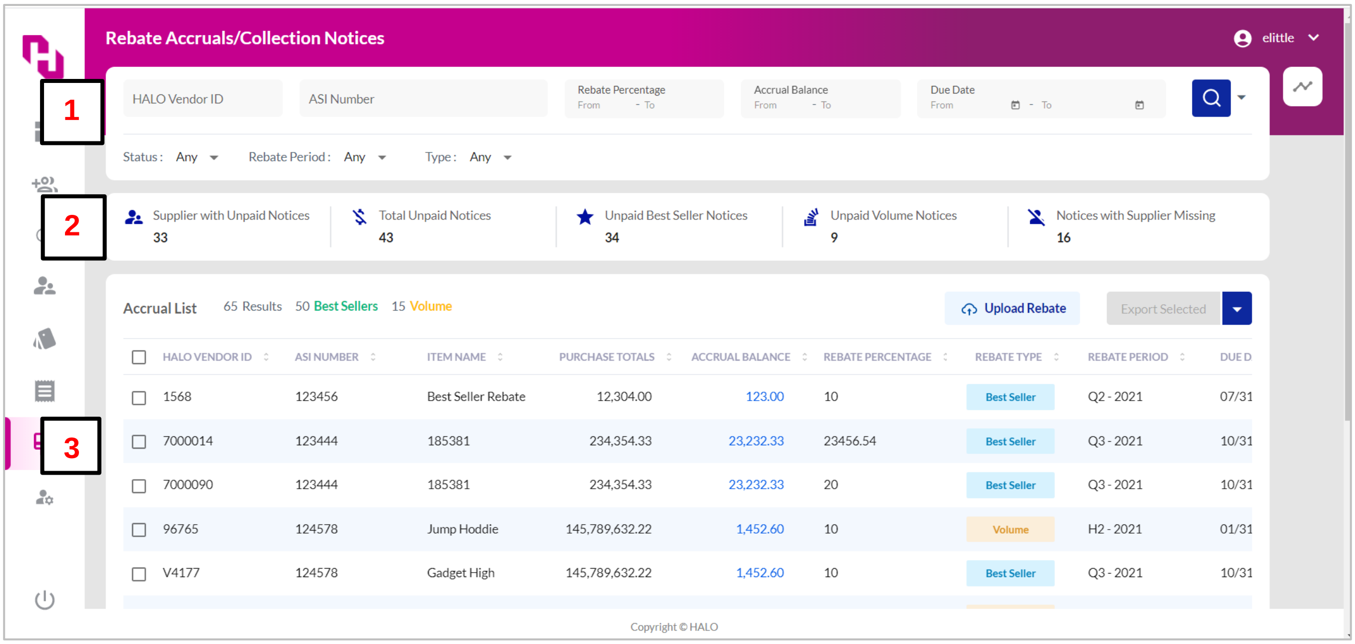
By default the Audit Tracker screen allows 10 lines, which can be changed before exporting the data.



Modified By	Modified On (UTC)	HALO Vendor Id	ASI Number	Item Name	Purchase Totals	Accrual Balance	Rebate Percentage	Rebate Type	Rebate Period	Due Date (UTC)	Notice Date (UTC)	Paid/Sweep Date (UTC)	Status	Missing Supplier
tpartrid	07-14-21 08:58 PM	7000090	123444	185381	234354.33	23232.33	20.00	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 00:36:51	07/14/2021 20:58:32	Unpaid	Yes
tpartrid	07-14-21 08:58 PM	7000090	123444	185381	234354.33	23232.33	20.00	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 00:36:51	07/14/2021 20:58:13	Paid	Yes
tpartrid	07-14-21 08:58 PM	1568	123456	Best Seller Rebate	12304.00	123.00	10.00	Best Seller	Q2 - 2021	08/01/2021 04:59:59	07/14/2021 08:49:41	07/14/2021 20:58:13	Paid	No
tpartrid	07-14-21 08:56 PM	7000090	123444	185381	234354.33	23232.33	20.00	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 00:36:51	07/14/2021 20:56:23	Unpaid	Yes
tpartrid	07-14-21 08:55 PM	7000090	123444	185381	234354.33	23232.33	20.00	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 00:36:51	07/14/2021 20:55:56	Paid	Yes
dummy	07-14-21 08:49 AM	1568	123456	Best Seller Rebate	12304.00	123.00	10.00	Best Seller	Q2 - 2021	08/01/2021 04:59:59	07/14/2021 08:49:41	07/14/2021 08:49:39	Unpaid	No
vsiddams	07-14-21 08:49 AM	1568	123456	Best Seller Rebate	12304.00	123.00	10.00	Best Seller	Q2 - 2021	08/01/2021 04:59:59	07/14/2021 08:49:39	07/14/2021 08:49:39	Unpaid	No
vsiddams	07-14-21 08:48 AM	1568	123456	Best Seller Rebate	12304.00	123.00	10.00	Best Seller	Q2 - 2021	08/01/2021 04:59:59	07/14/2021 08:48:17	07/14/2021 08:48:15	Unpaid	No
dummy	07-14-21 08:15 AM	7000014	123444	185381	234354.33	23232.33	23456.54	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 08:15:00	07/14/2021 08:14:58	Unpaid	No
pvirupak	07-14-21 08:14 AM	7000014	123444	185381	234354.33	23232.33	23456.54	Best Seller	Q3 - 2021	11/01/2021 04:59:59	07/14/2021 08:14:58	07/14/2021 08:14:58	Unpaid	No

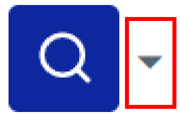
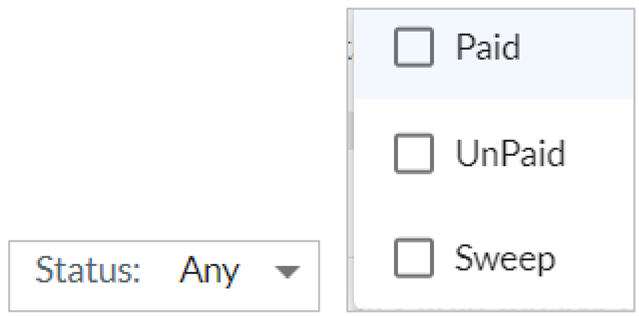
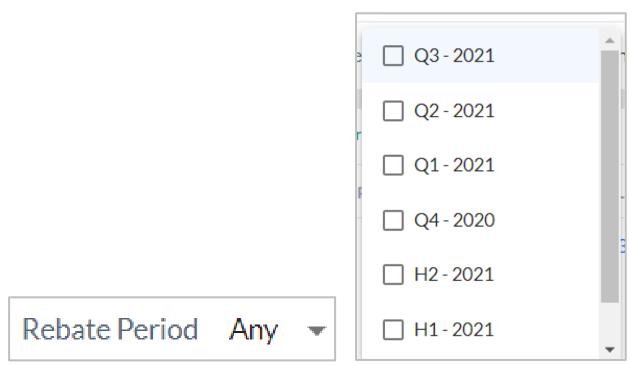
Overview of Rebate & Accruals

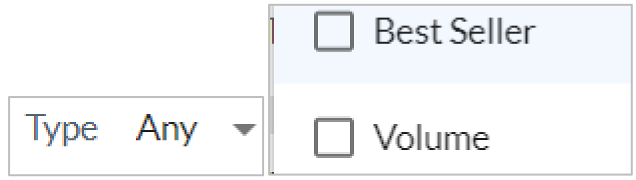
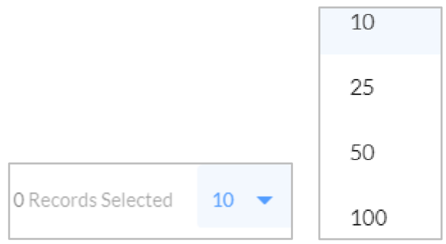
The HALO team manages accrual balances and rebate related Supplier information through the Rebates & Accruals screen. Most of the information on this screen is supplied as a spreadsheet by the HALO team.



- HALO team can review the list of accrual balances for **all** suppliers.
- The selected records can be exported as a spreadsheet.
- The screen has three sections:
  1. **Search** - The rebate period filter options are dynamically changed based on the current month and year.
  2. **Summary** – The count of the Supplier and Unpaid Notices, Unpaid Best Seller Notices, and Notices with Supplier Missing.
  3. **Accrual List table** – Allows for the review of Accrual balances and Rebate related information.

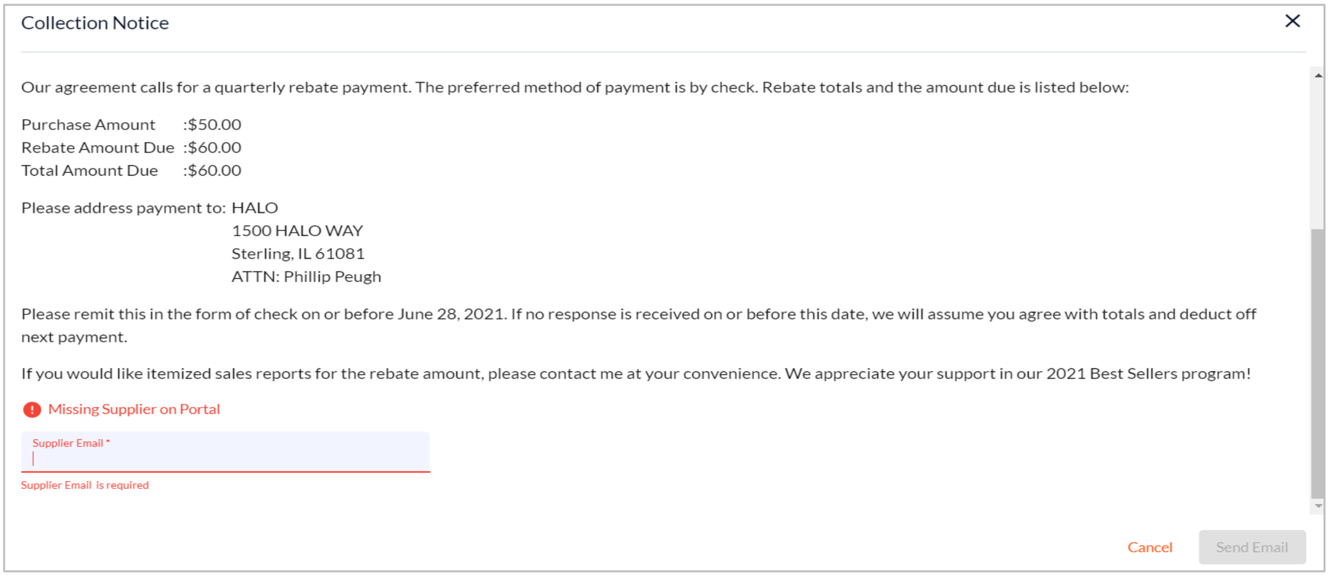
Search for Rebates and Accruals

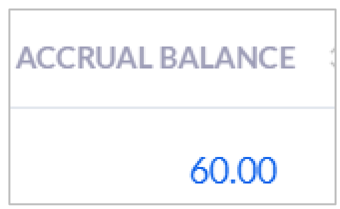
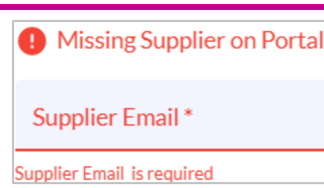
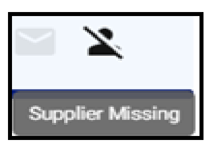
Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the menu options. (Optional)	
2	Click the **Rebate Accruals / Collection Notices** button.	
3	**Search** via the Vendor ID, ASI Number, Rebate Percentage, Accrual Balance, Due Date, Status, Rebate Period, or Type. After the search criteria has been entered or selected, click the **Search** button. Click the down arrow (▼)to the right of **Search button** drop-down field to display the applied filters and the **Clear Filters** button.	  Click the **Clear Filters** button to remove all the applied filters.
4	Click the **Status** for search criteria (optional). Suppliers can filter the status of rebates and accrual balances. ▪ Click the down arrow (▼) available just to right of Status field. ▪ Click in the checkbox(es) to select the fields from below: **a. Paid** **b. UnPaid** **c. Sweep** – Happens when someone ignores a collection notice and doesn't send a payment. The amount owed is taken out of the next order that the Supplier is to be paid for, and so it is a "sweep" of the collection payment.	
5	Click to search via **Rebate Period** (optional). ▪ Quarters start in January. ▪ H periods are semi - annual periods.	

6	Click to search via **Type** (optional).	
7	After the search criteria is complete, click the **Search** button (magnifying glass) to return the search results.	
8	Matches will display in the main screen. Based on the search criteria, the values on the column header are updated to match the search end results.	QUICK TIP If there are no matches to the search criteria, an error message is displayed: “No Supplier records are found using search Criteria”.
9	Users can choose the **number of records to display per page**. The drop-down button is located at the bottom left of the screen. By default,10 will be displayed.	

Collection Notice

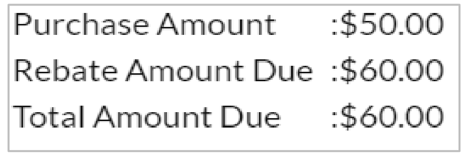
The HALO team can click the Accrual Balance hyperlink to navigate to the collection notice screen. This screen uses a template and populates the collection notice with information from the selected record.



Step	Description/ Action	Details or Screen Shots
1	The **Accrual** column contains hyperlinks that display the Collection Notice. Click the **ACCRUAL BALANCE ($)** or **Notice** to display a popup screen with Collection Notice details (Displayed above). The balance can be a collection notice for Best Seller or Volume Rebate along with its rebate period that is available on the header of the screen.	
2	The Email of the Rebate Contact of the supplier or Main Contact will default in the **TO** field of the Collection Notice When the Supplier does not have a Rebate Contact, a red **Missing Supplier on Portal** will display toward the bottom left of the Collection Notice. ▪ The **Supplier Email** is mandatory and must be manually entered if it is missing on the Collection Notice. ▪ If the supplier is not on the portal, the records Supplier Actions columns will display a **Supplier Missing** tag on the grid). ▪ The **Send Email** button is disabled (gray) until an Email is entered.	

NOTE The email will contain a:

- Link to HALO to view the notice.
- A PDF attachment with the Purchase Amount, Rebate Amount Due and Total Amount Due.



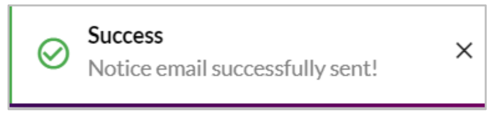
3

Click the **Send an Email** button to send a PDF attachment of the selected collection notice via Email.

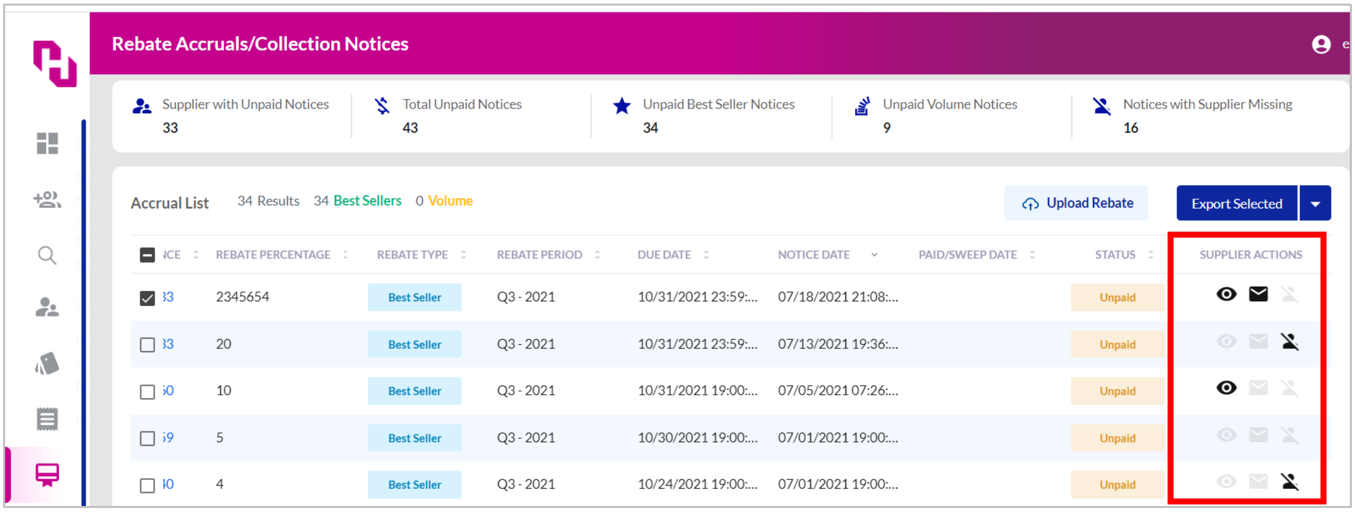
Click the **Cancel** to close the Collect Notice without sending it.

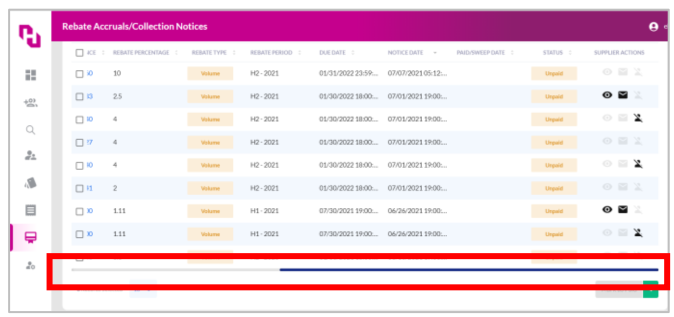
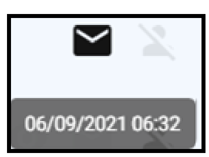
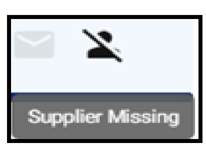
4

A popup will briefly display in the upper right corner confirming the email was successfully sent.



Supplier Actions



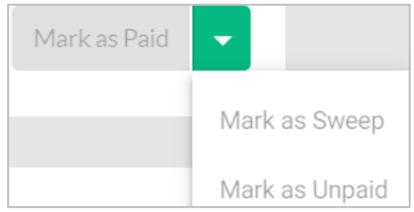
Step	Description/ Action	Details or Screen Shots
1	Use the scroll bar at the bottom of the table, to move to the right to reveal the **Supplier actions** columns.	
2	Review the **Supplier Actions.** **View Icon** – indicates if the supplier has viewed the record. ▪ The icon is grayed-out if the supplier has not reviewed the collection notice. ▪ When the supplier has reviewed the collection notice, the icon turns black and hovering over it displays the last review timestamp. **Email Icon** – indicates if the supplier has emailed themselves a copy of the collection notice. ▪ The icon is grayed-out if the supplier has not reviewed emailed a copy. ▪ When the supplier emails a copy of the collection notice to themselves, the icon turns black and hovering over it displays the last email time stamp. **Supplier Missing** – indicates that supplier is not available for the corresponding records on the supplier portal.	  **View** Icon  **Email** Icon  **Supplier Missing** Icon

3

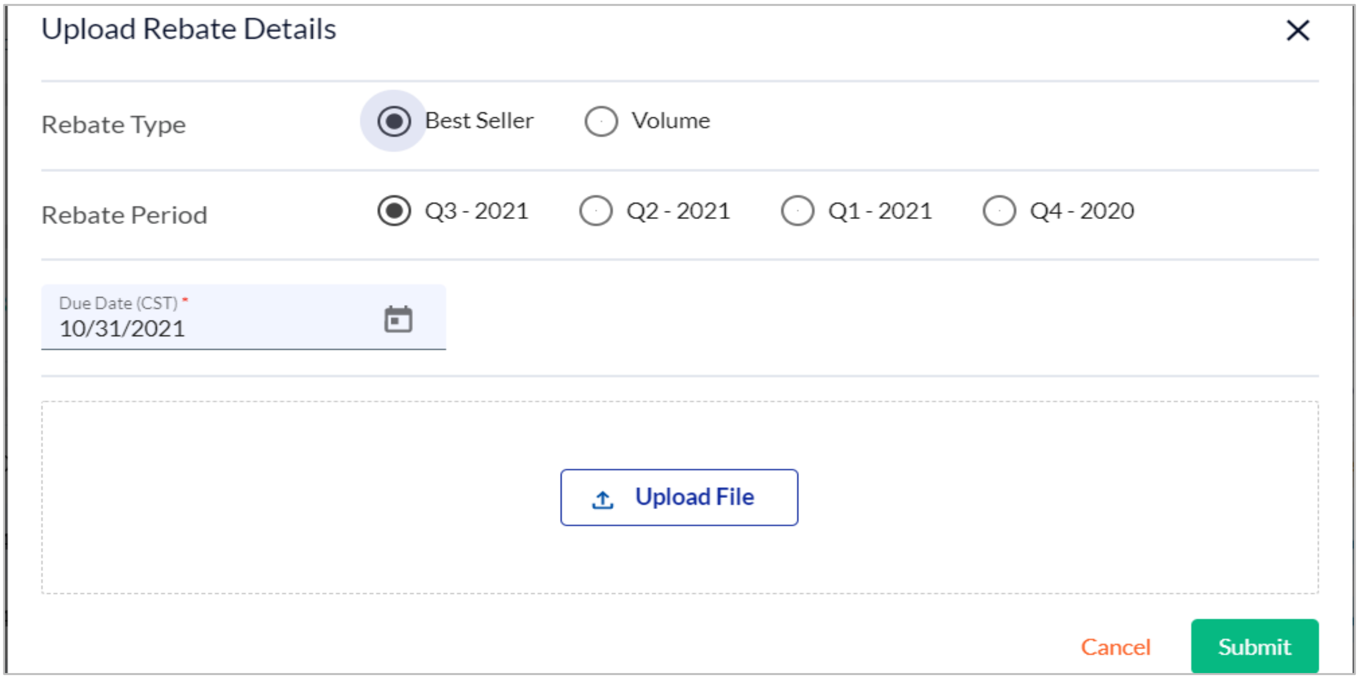
- Click the **Mark as Paid** button

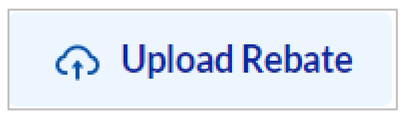
OR

- Click the drop-down arrow and select the **Mark as Sweep** or **Mark as Unpaid** options:
- Click the **check box** next to a line item and select the appropriate option



Upload Rebates Spreadsheet



Step	Description/ Action	Details or Screen Shots
1	Click the **Upload Rebate** button and the Upload Rebate Details popup window displays.	
2	Information is captured from the user.	a. Rebate Type b. Rebate Period c. Due Date populated based on Rebate Period d. Rebate/Accrual data is entered in the spreadsheet.
3	Upload the spreadsheet with details of Rebate/Accruals. ▪ A **Specified Spreadsheet** template is allowed. ▪ The **Best Seller** and **Volume Records** must be on different spreadsheets.	
4	When the spreadsheet is complete, click the **Upload File** button and follow the directions.	
5	Once the upload Rebate Details screen has all information, click the **Submit** button. NOTE The user cannot load any Rebates until the current submission is complete.	

6

The data validation starts. The parameter used for cross checking is the HALO Vendor ID.

Any records (to be uploaded) matching an existing record are crosschecked, and are overwritten with the new information.

- A pop-up window displays informing the user of successful records and error records.
- Error records section can be expanded to view the record line number and error reason.

7

User can choose to cancel or submit the information.

- Clicking the **Cancel** button stops the process.
- Clicking the **Submit** button ignores the errors and submits the valid records to the portal.

8

Once the valid data is received by the portal:

- **Collection Notices in PDF format** are generated for either Best Seller or Volume and stored on the IDM in M3.
- The upload date is the Notice date.
- The HALO Vender ID is the field used for the cross-check.
- If a record submitted from the spreadsheet already exists on the portal, it is cross - checked and over - writes the original with the spreadsheet new information.
- The records in the spreadsheet are mapped to the corresponding suppliers.
  - The records are added with the Rebate period values and due dates.
  - Simultaneously, a new PDF is generated.
- The user can upload another spreadsheet.

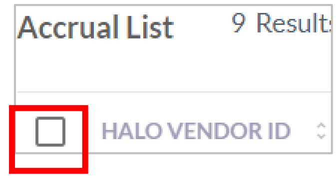
Export Rebates and Accruals

Step	Description/ Action	Details or Screen Shots

1

Select all / Deselect all the records header section. The check box is located to the left side of the screen next to the HALO VENDOR ID header.

- Enter a ☑ **check mark** in the box to select all the Invoice records displayed.
- A ⊟ **line** in the check box signifies that individual Invoices are selected.
- An ☐ **empty check box** signifies that none of the invoices have been selected.



Use this **check box** in the header to select all the invoices displayed

2

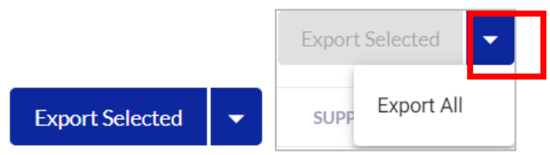
Click in the box beside individual invoices to add a check in the box to select it.

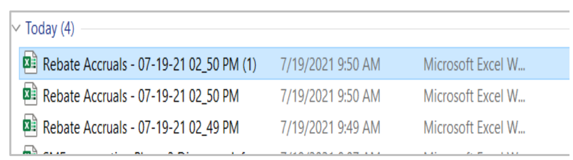
3

- Click the **Export Selected** button.
  - Automatically exports **selected** into a spreadsheet called Rebate Accruals with a date and time to the default Download area on the user's computer. (XLSX Format)

OR

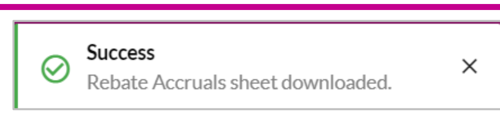
- Click the **drop-down arrow** beside the Export Selected button.
- Click the **Export All** option.
  - Automatically exports **all records** into a spreadsheet called Rebate Accruals with a date and time to the default Download area on the user's computer. (XLSX Format)

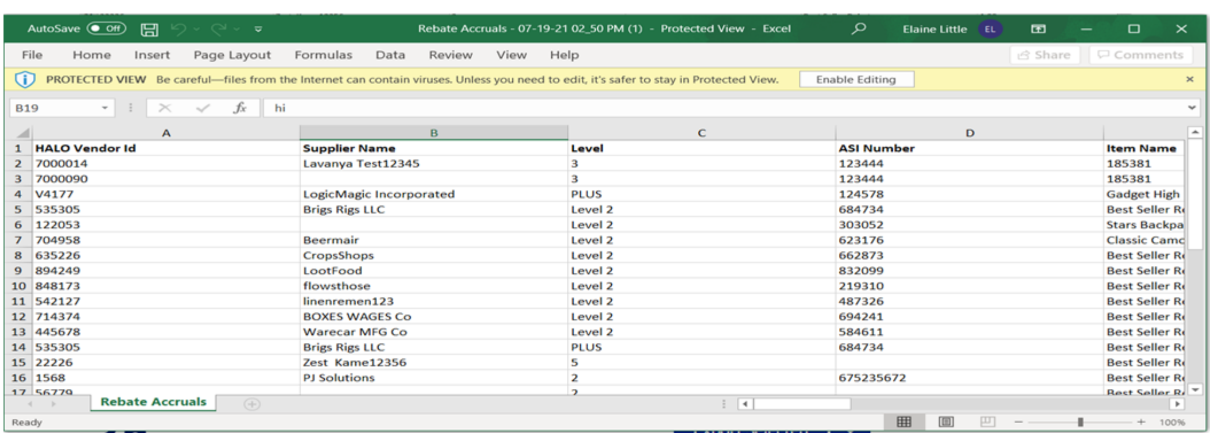




4

A popup will briefly display in the upper right corner confirming the Rebate Accruals Sheet downloaded successfully.





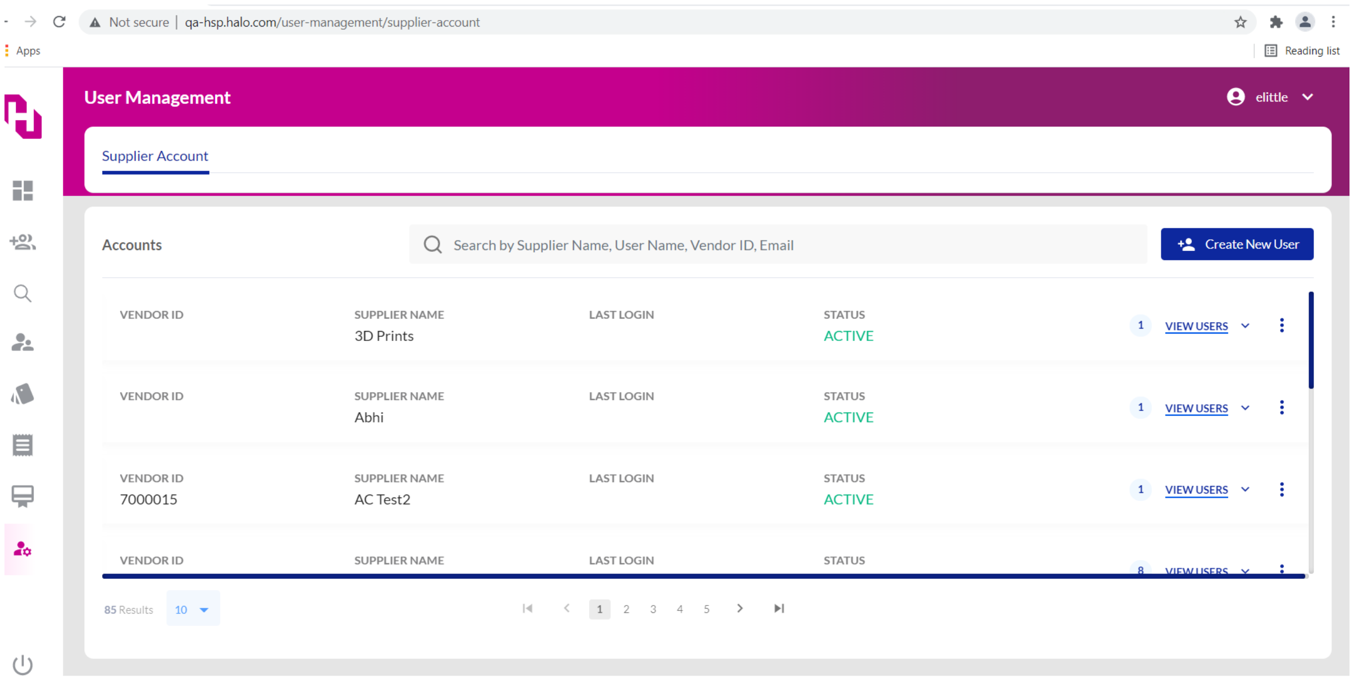
	A	B	C	D	
1	HALO Vendor Id	Supplier Name	Level	ASI Number	Item Name
2	7000014	Lavanya Test12345	3	123444	185381
3	7000090		3	123444	185381
4	V4177	LogicMagic Incorporated	PLUS	124578	Gadget High
5	535305	Brigs Rigs LLC	Level 2	684734	Best Seller R
6	122053		Level 2	303052	Stars Backpa
7	704958	Beermair	Level 2	623176	Classic Camc
8	635226	CropsShops	Level 2	662873	Best Seller R
9	894249	LootFood	Level 2	832099	Best Seller R
10	848173	flowsthose	Level 2	219310	Best Seller R
11	542127	linenremen123	Level 2	487326	Best Seller R
12	714374	BOXES WAGES Co	Level 2	694241	Best Seller R
13	445678	Warecar MFG Co	Level 2	584611	Best Seller R
14	535305	Brigs Rigs LLC	PLUS	684734	Best Seller R
15	22226	Zest Kame12356	5		Best Seller R
16	1568	PJ Solutions	2	675235672	Best Seller R
17	56779		2		Best Seller R

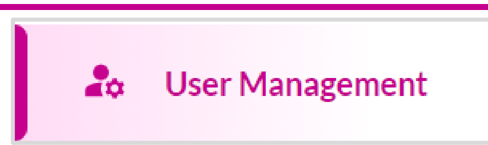
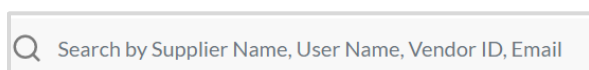
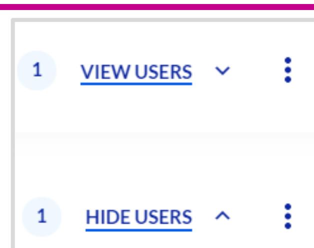
Rebate Accruals

Ready

User Management

The User Management screen is for maintaining the HALO Supplier Accounts.



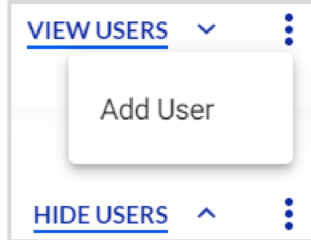
Step	Description/ Action	Details or Screen Shots
1	**Hover over the left panel**, to display the menu options. (optional)	
2	Click the **User Management** button.	
3	Enter the following to search for Accounts: **Supplier Name, User Name, Vendor ID and Email addresses**.	
	NOTE	The Account screen displays with the Vendor ID, Supplier Name, Supplier Last Login, Supplier Status and Number of HALO Users for each Supplier.
4	Click the **Create New User** button to create a new user, but you will have to enter the Vendor ID.	
5	Click the **View Users/Hide Users** button. When the View Users button is selected, the page expands to display all the user details of the selected Supplier. When the Hide User button is selected, the page collapses to hide the user details.	

6

At the end of each Supplier is a Visible/ Hidden User drop down option with the (⋮) **Ellipsis** button.

Click the (⋮) Ellipsis button to display the **Add User** button.

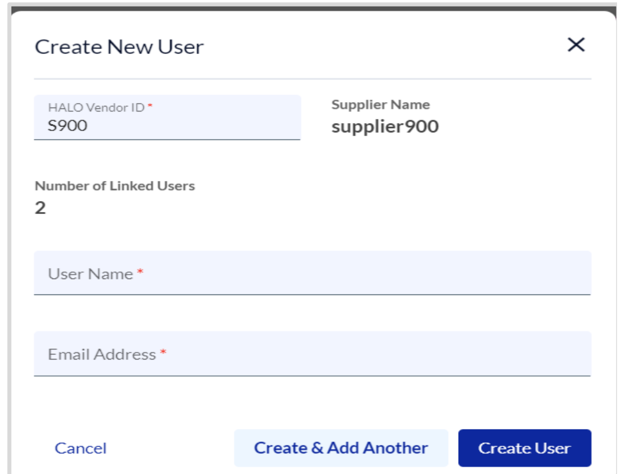
Note: Users can also click the Create User Button.



7

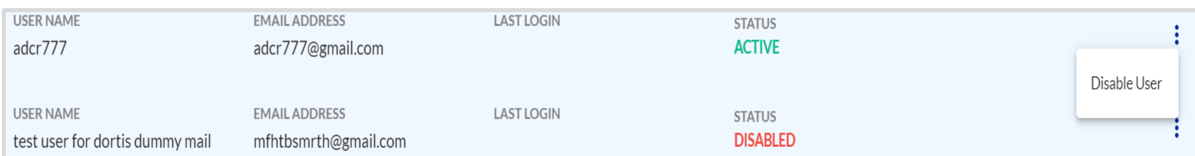
Click the **Add User** Button to add a new user for the selected Supplier.

- The **Vendor ID** is prepopulated.
- Entering the **User Name** and **Email Address** is required.
- Click one of the Following buttons:
  - Create User
  - Create & Add Another
  - Cancel



8

At the end of the User information is the (⋮) **ellipsis** button. When clicked, it displays either a Disable User button for an Active status or an Active User button for Disabled status. The option is to enable or disable the user.



Supplier Portal receives updates from M3

- To have a consistent view of information, HALO Supplier Portal is synced with M3 systems.
- The HALO system M3 is also capable of modifying the Supplier information and contacts. Some attributes like Supplier Preferred Level and Rebate can be changed through M3.
- Once the changes happen in M3 to the Supplier Master or associated records (PPS100 – Preferred Supplier Information), either change will trigger a BOD update from M3 to the HALO Supplier Portal. Accordingly, the portal alters the supplier records. After the changes are complete an email notification is sent:

To: SupplierPortal@Halo.com Sub: <Supplier Name>, <HALO Vendor ID> | Update Received from M3 Body: The Supplier's preferred level has been updated to <New Value>. The update on Supplier Portal was done at <Time Stamp>. Confidential Information. The Supplier's Rebate has been updated to <New Value>. The update on Supplier Portal was done at <Time Stamp>.