

# Navistar Supplier Collaboration Portal Training External Users



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## Why Source to Contract?

- Cloud-Based Platform
- Helps innovate and achieve best-in-class collaboration with our Suppliers
- Real-Time Access
  - Supplier Profile
  - Account Information
  - RFx and Auctions
- Eliminates email communication for contract authoring, mark up, review, and agreement
- Single Point of Interface between Suppliers and Navistar Procurement
- Free for External Users

# Supplier Registration

Via Email Link from Navistar



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# Supplier Registration

Step 1 – Suppliers will receive an email providing them with a link to “Set password” and another link to “Login”. Click “Set password” and create a password for your “user ID”

## Subject

Access to Ivalua Buyer

## Notification body

Dear Name Name,

You have just been assigned an access to the application [Navistar S2C Portal](#) for supplier McGraw Supplier HQ with the following [user ID : Invite@email.com.](#)

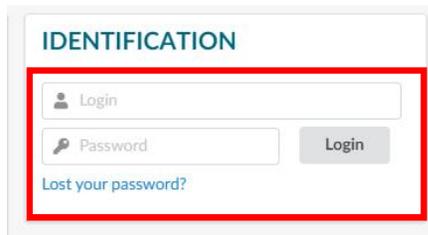
You now have to set a password on the following page [Set password.](#)

You will then be allowed to connect on [Navistar S2C Portal](#) [Login.](#)

Step 2 – Click “Login” to go to the Source to Contract Portal Homepage

# Supplier Registration

Step 3 – Login with your “user ID” and “Password”.  
Click “Login”



IDENTIFICATION

[Lost your password?](#)

Step 4 – Review the Navistar “Standard Terms and Conditions”. Select “I have read the terms and conditions” and click “Acknowledge”. *You will only have to do this your very first time logging in*

You have to confirm you read the terms and conditions in order to continue.

**STANDARD TERMS AND CONDITIONS**

I have read the terms and conditions

# Portal Navigation



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# Portal Navigation

## Portal Home Page

1. User Profile
2. System Notifications
3. Global Search
4. My Pending Validations
5. User Modules
6. Home Icon
7. **Navigation**
  - Go Back
  - History
  - Favourites
8. RFX in Progress
9. Supplier Scorecard and Spend Analysis

The screenshot displays the NAVISTAR ACCEPTANCE Supplier Portal interface. The top navigation bar includes links for General Info, Performance, Sourcing, Contracts, and Items. A search bar is located in the top right corner. The main content area is divided into several sections: a left sidebar with navigation options like Company Profile, Import Catalog, Create Receipt, Create Invoice, and Scorecard; an Announcement section; an Onboarding Progress section with a checklist of tasks (Registration, Profile Setup, On-Boarding, Active Supplier) and a warning box about missing questionnaire responses; a Validations section; a Performance Scoring section with a message about no data; and a Spend Analysis section with an error message. A 'RFP in Progress' indicator is visible in the bottom right. Numbered callouts (1-9) are overlaid on the image to identify specific UI elements corresponding to the list on the left.

# Supplier Hierarchy



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# Supplier Hierarchy

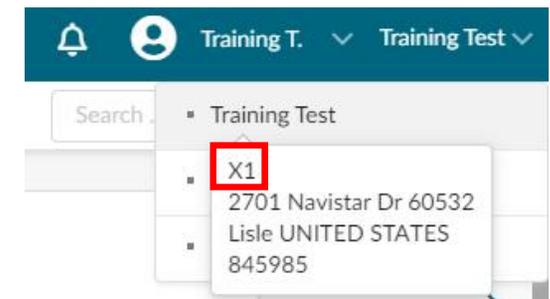
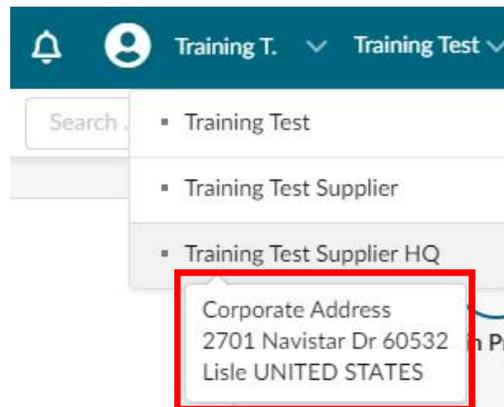
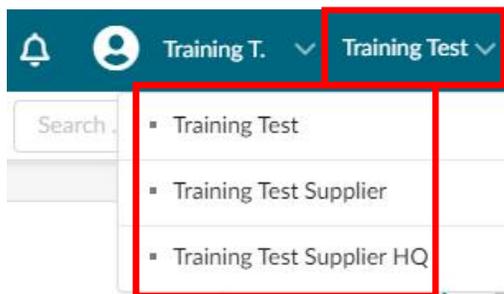
- **Level 1 – Group**
  - Houses all of the Supplier Codes for a Supplier
- **Level 2 – Head Office**
  - Assigned a specific Supplier Code
- **Level 3 – Supplier Site**
  - Assigned specific location codes (X, S, P, etc.)

## Parent/Child Structure

- SUP067940 95145 - Training Test Supplier - UNITED STATES -
  - SUP067941 98456 - Training Test Supplier HQ - UNITED STATES - Lisle
  - SUP067942 64258 - Training Test - UNITED STATES - Naperville

# Supplier Hierarchy

When you are in your profile, you can see your Supplier Hierarchy by clicking the dropdown next to your name. This will have your Group, Head-Office, and Supplier Site(s) listed. If you hover over the Head-Office or Supplier Site(s) it will show you the address for that location.



Supplier Site(s) will also have the Location Code.

Go to **Slide 20** for more information about Location Codes.

# Location Code Information



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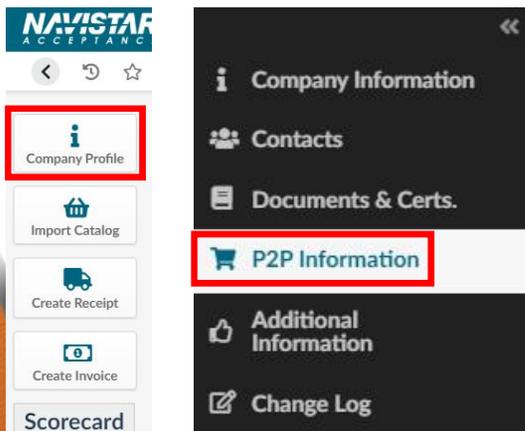
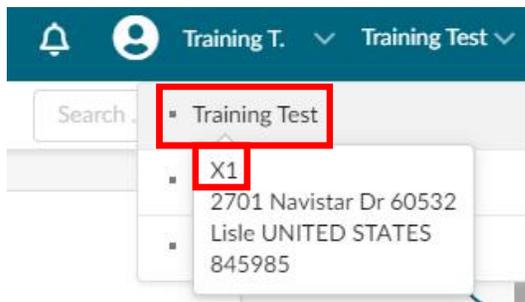


## Location Code Information

- Addresses to Populate Based on Location Code
  - Order Address – S Code
  - Payment Address – A, M, or E Codes
  - Ship-from Address – X & P Code
  - Return Address – X & P Code
  - Manufacturing Address – X & P Code

# Location Code Information

.When you select your Supplier Site, you will need to update your “P2P Information”. Go to your “Company Profile” and click “P2P Information” in the sidebar. Based on the Location Code for your Supplier Site (X1 shown below), please update the addresses accordingly. You will also need to update your “Purchasing Information”, “Banking Information, and “Payment Information”



## Order Address

Address Label ⓘ

## Payment Address

Address Label ⓘ

## Ship-from Address

Address Label

## Return Address

Address Label

## Manufacturing Address

Address Label

## Purchasing Information

▼ EDI

▼ Shipping

▼ Packaging

▼ Other

## Banking Information

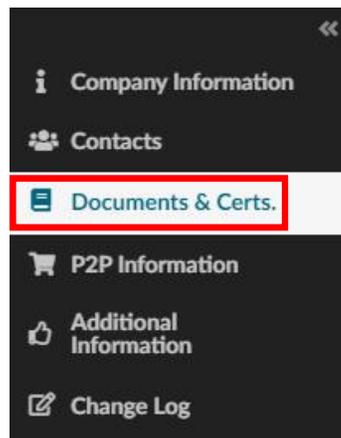
0 Result(s)

## Payment Information

0 Result(s)

# Location Code Information

.While you are still in your Supplier Site, click the “Documents & Certs” link in the side bar. Make sure to upload your W8 or W9 in “Other Documents”



# Profile Updates

Active Suppliers



IT'S UPTIME™

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# Supplier Registration

When you first log into your Company Information, you will get the following alerts. The next steps will walk you through how to add this information and clear the alerts.

**\*Note there is an additional requirement to complete all fields in the “additional information” tab and there are currently no alerts being populated until November**

Step 1 – Click on  
“Company Profile”

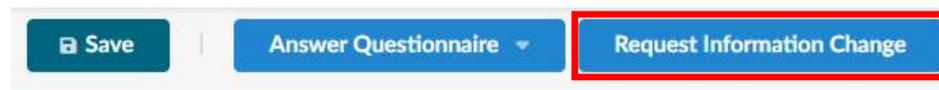


- ⚠ Missing Mandatory Document(s)
- ⚠ Supplier Type or Main Commodity is missing
- ⚠ Missing contact with the following role: Account Representative Manager
- ⚠ Missing contact with the following role: VP Engineering
- ⚠ Missing contact with the following role: VP Quality
- ⚠ Missing contact with the following role: VP Sales

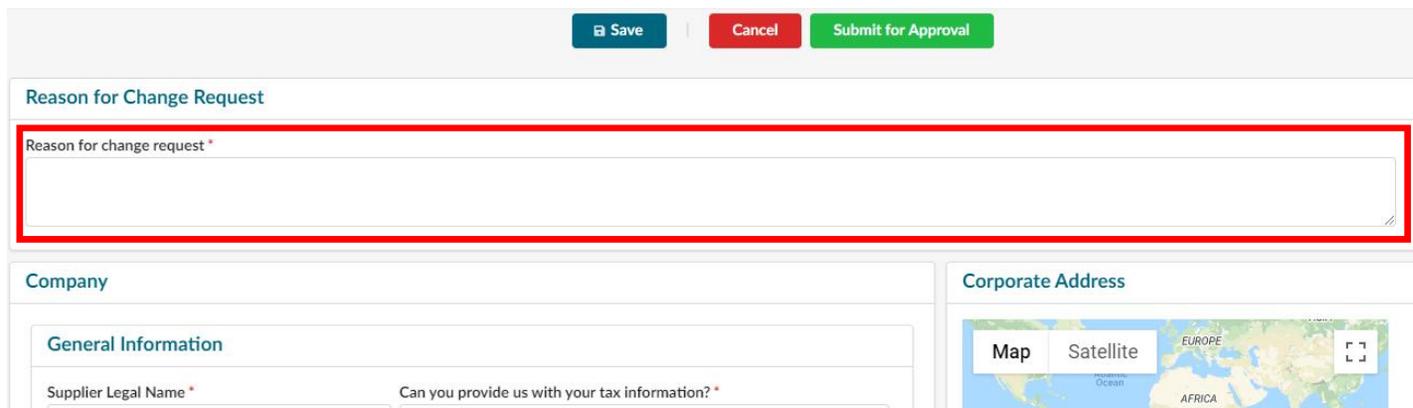
- ⚠ Missing contact with the following role: CFO
- ⚠ Missing contact with the following role: CEO
- ⚠ Supplier has NOT answered the Supplier Questionnaire

# Profile Updates

Step 2 – At the top of the page, click “Request Information Change”



Step 3 – Enter a “Reason for Change Request” that says “Updating Company Profile Information”, update the information in your “Profile” shown in the next slides

A screenshot of a web form interface. At the top, there are three buttons: 'Save' (blue), 'Cancel' (red), and 'Submit for Approval' (green). Below the buttons is a section titled 'Reason for Change Request' which contains a large text input field with a red border. Underneath this are two main sections: 'Company' and 'Corporate Address'. The 'Company' section has a sub-section 'General Information' with two input fields: 'Supplier Legal Name \*' and 'Can you provide us with your tax information? \*'. The 'Corporate Address' section features a map with 'Map' and 'Satellite' tabs, and a zoom-in icon. The map shows parts of Europe and Africa.

# Supplier Registration

## Company

### General Information

Supplier Legal Name *	Can you provide us with your tax information? *
<input type="text" value="Legal Name"/>	<input type="text"/>
Company Name	Why are you not able to provide tax information?
<input type="text" value="en"/>	<input type="text"/>
Website	Tax ID Type *
<input type="text"/>	<input type="text"/>
Legal Structure	Tax ID Number *
<input type="text"/>	<input type="text" value="951874"/>
NAICS Code	Site DUNS *
<input type="text"/>	<input type="text"/>
PO Email ⓘ	Global Ultimate DUNS for Head-Office *
<input type="text"/>	<input type="text"/>
Main Commodity	Year Founded
<input type="text"/>	<input type="text"/>

### Supplier Scorecard

Access Supplier Scorecard [here](#)

### Corporate Address



Address Label ⓘ

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Zip Code/ Postal Code City

Country \* State/Province

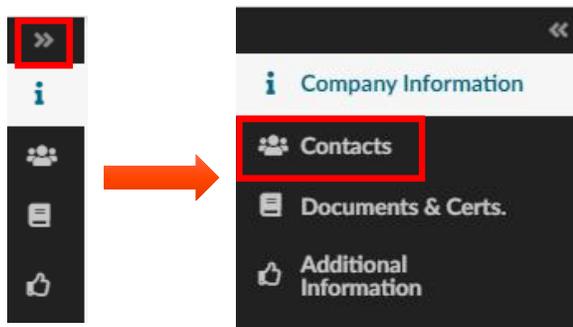
UNITED STATES

Step 4 – Update your Company’s “General Information” and “Corporate Address”

- Will require a Request Information Change to update.

# Supplier Registration

Step 5 – Click the two small arrows to expand your “Sidebar” and click “Contacts”



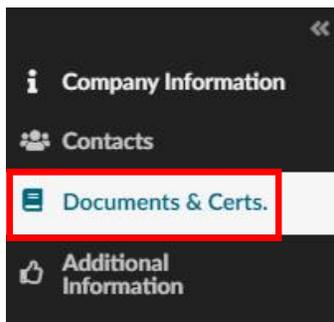
Step 6 – You will see your contact information and you can add other members in your company to your “Internal Contacts” by clicking “+ Create Contact”, enter the information (including “Position” and “Role”), and press “Save & Close”

A screenshot of the 'Internal Contacts' form. At the top, there are two buttons: 'Select Existing Contact' and '+ Create Contact'. The '+ Create Contact' button is highlighted with a red box. Below these buttons is a table with the following columns: Contact, Invite Supplier, Login, Position, Role, and Status. The table contains one row of data for a contact named 'John Doe' with the email 'SupplierEmail@Email.com' and the role 'Account Manager'. The status is 'Active'.

A screenshot of the 'Identity' form. The form is divided into several sections: 'Identity', 'Phone', 'Photo', and 'Corporate Address'. The 'Identity' section contains fields for Title, First Name (John), Last Name (Doe), Email (JDoe@Email.com), Position (highlighted with a red box), and List of languages (English). The 'Phone' section has fields for Main Phone, Business Phone, Cell Phone, and Fax. The 'Photo' section has an 'Add a picture' button. The 'Save & Close' button at the top right is highlighted with a red box.

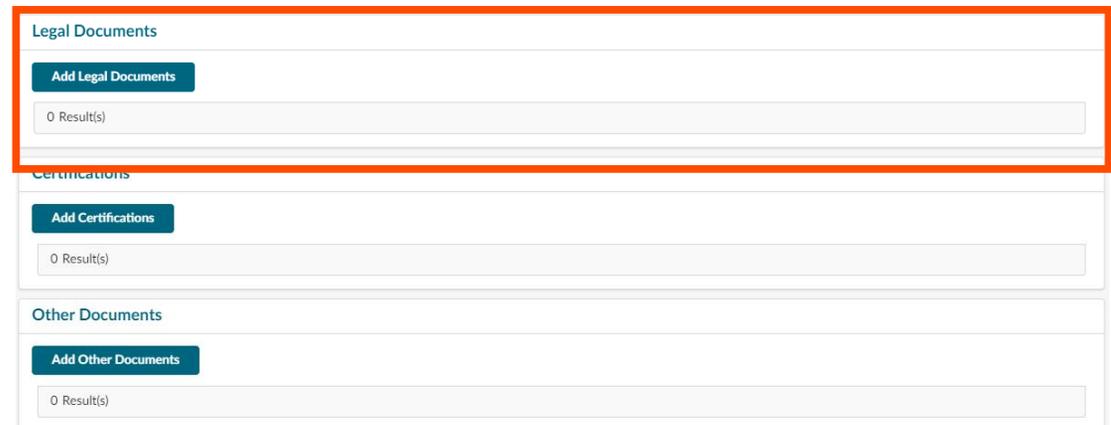
# Supplier Registration

Step 7 – Click the “Documents & Certs” link in the Sidebar



Step 8 – Upload any Supplier/Navistar “Legal Documents”, Supplier “Certifications”, and any “Other Documents”

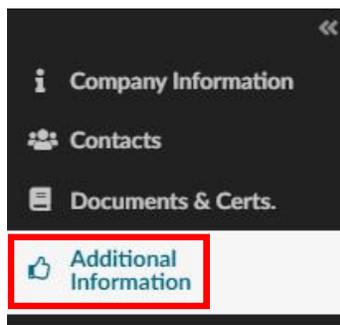
- NDA's are mandatory and a fully signed copy must be added for your Category Mgr. to approve in order to clear your alert and participate in RFX's

A screenshot of a web application interface showing three sections: 'Legal Documents', 'Certifications', and 'Other Documents'. Each section has a blue button to add documents and a grey bar showing '0 Result(s)'. The 'Legal Documents' section is highlighted with a red border. The 'Legal Documents' section includes an 'Add Legal Documents' button and a '0 Result(s)' indicator. The 'Certifications' section includes an 'Add Certifications' button and a '0 Result(s)' indicator. The 'Other Documents' section includes an 'Add Other Documents' button and a '0 Result(s)' indicator.

# Supplier Registration

Step 10 – Complete the “Additional Information” on the left side.

Step 9 – Click the “Additional Information” link in the Sidebar



**Additional Information Declared by the Supplier**

Have you responded to the onboarding questionnaire?

Have you read the T&C?

Geographical Regions

Supplier Commodities

Comment (Supplier)

Small Disadvantaged Business Program?

Other Preference Program?

Veteran Owned Small Business?

HubZone Program?

Emerging Small Business?

Woman owned?

Public or Private

Union or Non-union?

Contractor Type

Company Headcount

Step 11 – Ensure you have completed the Onboarding “Questionnaires” and upload “Customer References”

**Questionnaires**

**Customer References**

# Profile Updates

Step 12 – Double check all information has been updated and click “Submit for Approval”

Save | Cancel | **Submit for Approval**

**Reason for Change Request**

Reason for change request \*

**Company**

**General Information**

Supplier Legal Name \*      Can you provide us with your tax information? \*

**Corporate Address**

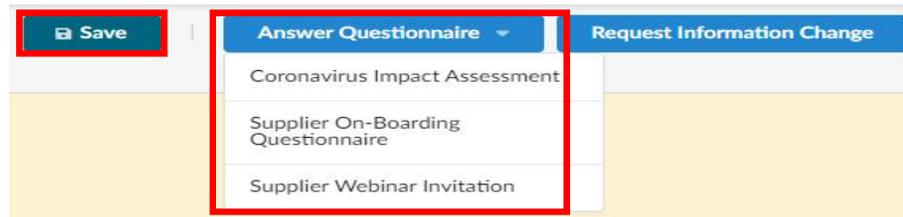
Map    Satellite    EUROPE    AFRICA

- The “Change Request” will be sent to Navistar’s Business Services Team
- The NBS Team will update the “Supplier Profile” and send it to the Category Manager for approval
- The Supplier Profile will be updated once “Approved”

# Onboarding and Risk Survey

Step 13 – If you haven't taken the Onboarding "Questionnaires", click "Save", "Answer Questionnaire", and answer each "Questionnaire" provided

Tip: To go back to an in-process onboarding questionnaire, go to additional information and scroll down to questionnaires.

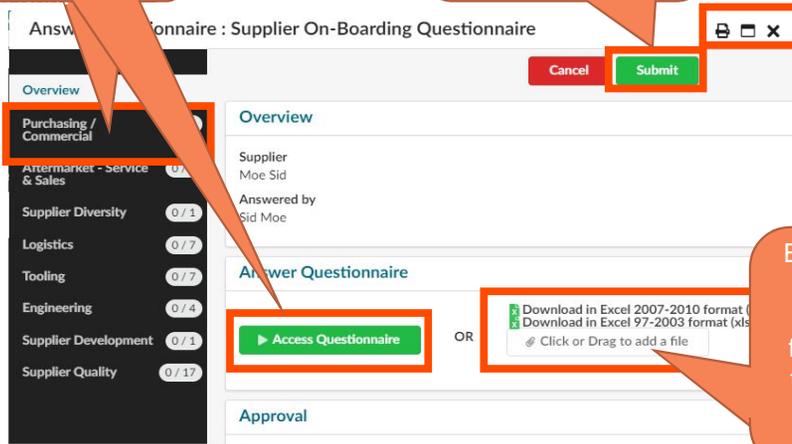


Access the questionnaire

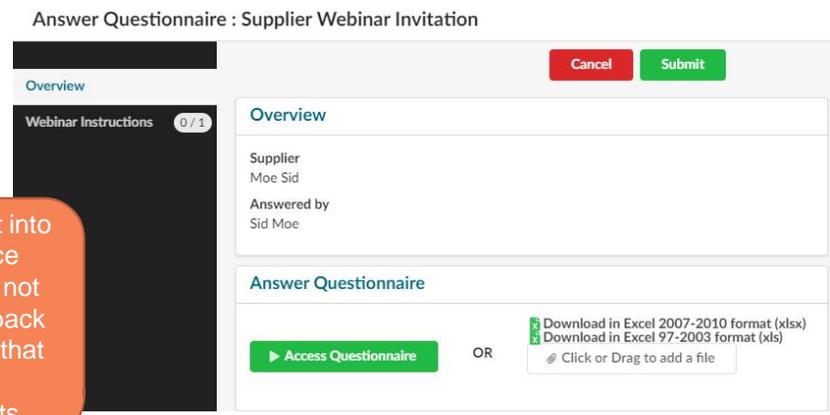
Hit Submit if all required questions have been answered

Hit "X" to save if still incomplete

The Supplier Webinar is a yes/no questionnaire. If you have not attended please contact [suppliercapacity@navistar.com](mailto:suppliercapacity@navistar.com)



Export/Import into Excel. Once Imported do not forget to go back to questions that require attachments



# Next Steps for Suppliers



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## Next Steps for Suppliers

- Complete the Registration process within **by/before Oct. 30<sup>th</sup>**
- Update your Company's Profile within **by/before Oct. 30<sup>th</sup>**
  - You **will not** be able to participate in any RFx events without updating this information
- If you have any questions email:
  - [S2CHelp@Navistar.com](mailto:S2CHelp@Navistar.com)
- Supplier Link to Portal
  - <https://navistar-supplier.ivalua.app/>

# Q&A



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