RPDM: Supplier Maintenance
Contents

• User Setup - Password change
• User Setup - One-time agent verification
• Homepage Overview
• Identify new Maintenance vs saved Maintenance
• Initiate New Maintenance
• Complete a Maintenance already in the workflow
• Quick Tips for common Maintenance changes
User Setup – Password Change
New User Email

Username

From: CVSHealth@cloudmail.stibo.com <CVSHealth@cloudmail.stibo.com>
Subject: [EXTERNAL] CVS Health - Supplier registration credentials

**** External Email - Use Caution ****

Hi Test Supplier,

We have created a new user in our Stibo system. Below are the details

Username: TSUPPLIER

Note: We recommend that you change your password after your first login.

URL Details: https://cvs-production.scloud.stibo.com/webui/WEBUI_CVSSupplierPortal

*Requires Google Chrome (Preferred), Microsoft Edge or Mozilla Firefox browser

Thanks,
CVS Team

***Important: This is a system-generated notification. Please do not reply this email.

Description / Steps

When a new User has been created, two separate system generated emails are sent from CVSHealth@cloudmail.Stibo.com –

1. Email containing Username

2. Email containing Temporary Password and One-time Verification Token (shown on the next slide)

Both emails will contain the URL for Stibo

Tips

Confirmation of Username creation will be sent from MDM_Stibo@cvshealth.com

Upon receipt of the confirmation email, but no email with the username, ensure to check your inbox for quarantined/blocked emails and permit emails from CVSHealth@cloudmail.Stibo.com
New User Email

Temporary Password and One-time verification Token

From: CVSHealth@cloudmail.stibo.com <CVSHealth@cloudmail.stibo.com>
Subject: [EXTERNAL] CVS Health - Supplier verification token

**** External Email - Use Caution ****

Hi Test Supplier,

We have created a new user in our Stibo system. Below are the password and one time verification token details

Password: A&2U2kv1kDd

One Time Verification Token : 205990813

Note: We recommend that you change your password after your first login.

URL Details https://cvs-production.scloud.stibo.com/webi/WEBUI_CVSSupplierPortal **Requires Google Chrome (Preffered), Microsoft Edge or Mozilla Firefox browser

Thanks,
CVS Team

*** Important: This is a system-generated notification. Please do not reply this email.

Description / Steps

When a new User has been created, an email will be sent with the Username and URL

Tips

• Ensure to change your password on first login and complete One-time verification

• Supplier data will not be accessible until One-time verification has been completed

• One-time verification token should be typed in to avoid extra spaces being copied in if copied and pasted directly from email
Password Change

User Login with temporary password

Description / Steps

1. Enter URL for Stibo
2. Enter Username from email
3. Enter temporary password from email
4. Click ‘Log-in’

Tips
Password Change

Click one time agent verification link

One Time Agent Verification link will be enabled in one of two places -

1. New Supplier Onboarding – click One Time Agent Verification

OR

2. New Agent Onboarding – click One Time Agent Verification

Tips

- New Supplier Onboarding – is initiated thru CM Invite
- New Agent Onboarding – New user Id created by MDM Stibo Team
Password Change

Password change

Description / Steps

1. Click on the hyperlink ‘Supplier - xxxxxxxx’

Tips
Password Change

Password change

1. Enter ‘N’ against the question “Have you changed your password upon first time login?”
   - Entering ‘N’ will populate the section to change your password

2. Click on “Click here” (a new window will be opened to change your password)

Tips
- Do not enter ‘Y’ if you have not changed your password. The system will not allow successful one-time verification until the password has been changed
Password Change

Password change

1. Enter temporary password from email
2. Enter new password of your choice
3. Re-enter new password
4. Click ‘Save’ (do not click ‘Reset’)

You will be logged out and redirected to the login screen required to log in with your new password

Tips

The next page outlines steps to complete One-time agent verification using the token
User Setup – One-time agent verification
One time agent verification

New password login

Description / Steps

Once the password has been changed and you have been redirected to login screen -

1. Enter URL for Stibo
2. Enter Username from email
3. Enter newly created password
4. Click ‘Log-in’

Tips
One time agent verification

Select One-time agent verification link

Description / Steps

One Time Agent Verification link will be enabled in one of two places -

1. **New Supplier Onboarding** – click One Time Agent Verification

   OR

2. **New Agent Onboarding** – click One Time Agent Verification

Tips
One time agent verification

Enter One-time verification token

Description / Steps

1. Select ‘Y’ from the dropdown to verify that the password was changed after first login
2. Enter the token number provided in the email and click outside the box/anywhere on the page
3. Click ‘Verify’

Tips

- **One-time verification token should be typed in** to avoid extra spaces being copied in if copied and pasted directly from email
- **Supplier data will not be accessible until One-time verification has been completed**
One time agent verification

One-time verification token – successful

Description / Steps

You will be navigated back to the main screen with a pop-up which indicates that verification was completed successfully.

Tips

User setup is completed.

Next slides will provide an overview of Stibo Homepage
Maintenance – Homepage Overview
Maintenance – Home Page

1. Click on the CVS icon to get to the home page
2. New Supplier Onboarding – supplier invitations to be completed
3. Supplier Maintenance – maintenance that has been started and not submitted.
4. Clarification workflow – CM has made changes to your payment terms or shipment terms for you to approve

Tips

The next slide will help you determine if there is maintenance to be completed
Maintenance – Select New or Saved Maintenance

New Maintenance

1. Select supplier search
2. Begin typing in the supplier number to select the supplier

New Maintenance (detailed in Slides 19 thru 22)

1. Select supplier search
2. Begin typing in the supplier number to select the supplier

Saved Supplier Maintenance

Maintenance has been started and not submitted

1. Hyper link will show if there is maintenance to complete
2. If nothing shows, there is no maintenance in your workflow
Maintenance – New Maintenance
New Maintenance – Supplier Search

Description / Steps

1. Click on ‘Supplier Search’
2. Enter Supplier Name or reference number in the text box
3. Click ‘Search’
4. Select the Supplier Name

Tips
New Maintenance – Begin Update

Description / Steps

1. Once the Supplier record opens, click on ‘Update’

Tips

If you get below error message, skip to slide 23

Error
Supplier is already in maintenance workflow
New Maintenance – Segments to Edit

Editable Segments

<table>
<thead>
<tr>
<th>Description / Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Each section will contain attributes you can edit.</td>
</tr>
<tr>
<td>Attributes not listed are managed by CVS only</td>
</tr>
<tr>
<td>Once changes are complete you must click submit</td>
</tr>
<tr>
<td>If no changes were made, click submit to release from workflow</td>
</tr>
</tbody>
</table>

**Supplier segment listing to review**

- Comments (will be blank when initiating a new maintenance)
- Supplier Overview
- Address
- Payment and Banking
- Supply Chain
- Ship Lane
- Compliance
- EDI
- Contact
- Documents
Maintenance – Supplier already in Maintenance Workflow
Maintenance – Supplier is already in Maintenance Workflow

Description / Steps

1. Click on the CVS icon to get to the home page

2. Supplier Maintenance – maintenance that has been started and not submitted.

3. Maintain Supplier Data – Link identifying how many vendors have open maintenance
   - Click the link to get to the supplier listing

Tips

If no maintenance needs to be completed the link will not be active and the count will be zero.
Maintenance – Supplier is already in Maintenance Workflow

**Description / Steps**

1. **Supplier ID link** - click to continue maintenance that was saved and not submitted
2. “Initiated by” identifies who started the workflow
3. Number of days it has been in the maintenance workflow

**Tips**

To start maintenance from the beginning please jump to slide 19
Maintenance – Supplier is already in Maintenance Workflow

Editable Segments

Description / Steps

Each section will contain attributes you can edit.

Attributes not listed are managed by CVS only.

Once changes are complete you must click submit.

If no changes were made, click submit to release from workflow.

Supplier segment listing to review

- Comments (will be blank when initiating a new maintenance)
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- Documents
Quick Tips for Common Maintenance Changes
Supplier Overview - Maintenance

Adding a Pay Supplier

Description / Steps

This field is in ‘Supplier Overview’

Tips

Next slide will provide guidelines on adding a Pay Supplier
Supplier Overview - Maintenance

Adding a Pay Supplier

Description / Steps

1. Click on ‘Add Pay Supplier’
2. Click on the tree icon
3. In the ‘Search’ tab, enter the Pay Vendor #, or Supplier Reference# and select the result
4. Click ‘OK’
5. Click ‘OK’

Tips

Click ‘Save’ to save your entries
Address Maintenance – Create New Address

Create an Address

**Description / Steps**

1. **Click Create new Address**
2. **Double click in the line 1 box to begin adding the address**
3. **Line 2 can be used for PO Box information or skipped**
   - City, State and Zip Code are required
4. **Click Save address when done**
5. **Pop-up to indicate that the address was created successfully.**
6. **Address info will then clear out**
   - Repeat steps 1 thru 6 for each address that is needed to represent your company

**Tips**

Click ‘Save’ to save your entries

Once address is saved you are ready to add the new existing address

Upon clicking “Save New Address”, the address will disappear from the Create New Address section but will be available to be reused in other address fields on this page.
Address Maintenance – Change an Address

Change Existing Address – Add/Remove

1. Click the box for the address to remove
2. Click remove address
3. Click Add existing address
4. Enter the address that was previously created by typing in the “Reference Target” field.
5. Select the address and click “OK”

Tips

- Click ‘Save’ to save your entries
- The system will not allow you to modify an address. If its incorrect simply remove from the segment and add a newly created address
Ship Lane Maintenance

Creating a Ship Lane

**Description / Steps**

1. Click ‘Create New Ship Lane’
2. Double click in ‘Address’. Type the address and select it
   2a. Alternate option – Click on the ‘tree’ icon and use the search bar to enter and select the Address
3. Double click in “Warehouse” to select a DC from the ‘Select Node(s)’ dropdown
4. Defaulted to Prepaid unless a different Freight Term has been approved
5. Double click in “Lead Time(days)” to enter a value between 1 and 999

**Tips**

Addresses selected for ‘Ship Lane’ must be present under ‘Ship From Address’ for a particular Supplier.

Click “Save” after creating the Ship Lane
1. Scroll to the bottom of the page and enter “Supplier Comments” if needed

2. Click “Submit”

Changes made will not be published until ‘Submit’ button is clicked