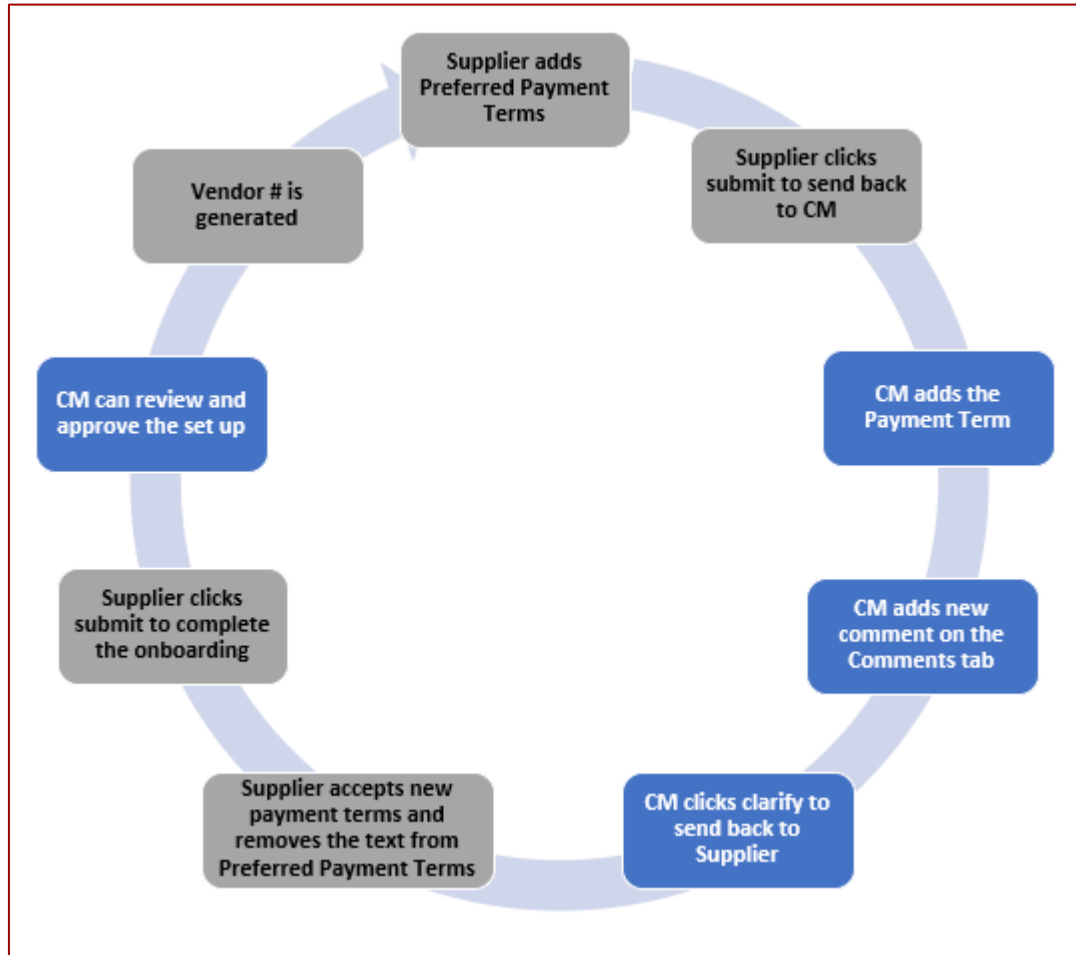


RPDM: CM & Supplier Clarify



Clarify Process for New Supplier Onboarding

The process illustrates how the clarify option works as a communication tool between the Category Manager and the supplier to answer questions with Payment Terms and Freight Terms



Supplier – Clarification

Adding Preferred Payment Terms

▼ Payment Terms

Please confirm your choice by double-clicking and selecting "Y" on the CHOICE box against the Term.

If the offered Payment terms are not the agreed payment terms, please reach out to the Category Manager on the CVS team

Clear all filters

Choice	Name	Short Desc	Discount %	Due Days	Net Days
<input type="checkbox"/>	7 DAYS	7	0.000	000	7
<input type="checkbox"/>	N30 DAYS	30	0.000	000	30
<input type="checkbox"/>	N15 DAYS	15	0.000	000	15
<input type="checkbox"/>	N10 DAYS	10	0.000	000	10
<input type="checkbox"/>	DUE IMMEDIATELY	0	0.000	000	0

Number of items: 5

Preferred Payment Terms:

Description / Steps

During Self-Onboarding, if the offered Payment Terms are not acceptable, a supplier can enter details in 'Preferred Payment Terms' and click 'Submit' to send the workflow back to CVS

Category Manager Clarify – Onboarding

Category Analyst Review -Clarification

The screenshot shows the UAT MDM Portal interface. On the left is a dark teal sidebar with the CVS Health logo at the top, marked with a red circle and the number '1'. Below the logo are navigation options: 'Tree', 'Quick Search', 'Supplier Reports', and 'Supplier Search'. The main content area is titled 'UAT MDM PORTAL' and contains three panels. The 'Quick Links' panel has 'Invite Supplier' and 'Advanced Search'. The 'Supplier Creation' panel has a table with 'Complete Supplier Invit.', 'Category Analyst Review', 'CM Review And Approval', and 'Total' (84). The 'Category Manager Mainten...' panel has 'Category Manager Mai...' and '14'. A 'Current User' panel shows 'Logged in: RPDM CM 1' and a 'Logout' button. Red callout circles with numbers 1, 2, and 3 point to the CVS logo, 'Category Analyst Review', and 'CM Review And Approval' respectively.

Supplier Creation	Total
Complete Supplier Invit.	58
Category Analyst Review	1
CM Review And Approval	1
Total	84

Description / Steps

1. Click on the CVS icon to get to the home page
2. Click Category Analyst Review to review the approved changes
3. Click CM Review and Approve to finalize the onboarding

Vendor # will be assigned

Tips

Next slide will outline how to review/approve a supplier

Category Analyst Review -Clarification

Description / Steps

Supplier Creation - Category Analyst Review - Available

Select all Clear all filters Assign

Registration ID	Supplier Name	First Name	Last Name	Email	Status of Registration	Assigned to me	Assignee	Initiated By	Team Name	Date Of Entry	No
<input type="checkbox"/> Supplier-16118305	RAMAN NANCY TESTING 1207 ROUND 2	Nancy	White	NancyWhite@nancynedle.com	Pending Review and Approval	✓	RPDM CM 1	Nancy White	Supplier	Tue Feb 15 2022 17:08:35 GMT-0500 (EST)	35 e mir
<input type="checkbox"/> Supplier-16118305	RYL UAT 10	Cheryl	Demers	Cheryl.Demers@cvshealth.com	Pending Review and Approval	✓	RPDM CM 1	RPDM CM 1	CVS Internal Team	Mon Jan 03 2022 13:30:27 GMT-0500 (EST)	78 e mir
<input type="checkbox"/> Supplier-16252666	P_G CLONE TEST	UNKNOWN	UNKNOWN	BLINDCARBONCOPY@CVSHEALTH.COM	Pending Review and Approval	✓	RPDM CM 1	Rich Jones	Supplier	Tue Dec 28 2021 10:05:53 GMT-0500 (EST)	84 e mir
<input type="checkbox"/> Supplier-16518348	RAMAN - CLONING TESTING	Nancy	White	NancyWhite@nancynedle.com	Pending Review and Approval	☐	RAMANGOUDA	Nancy White	Supplier	Wed Dec 22 2021 01:45:54 GMT-0500 (EST)	91 e mir
<input type="checkbox"/> Supplier-16584500	TEST123	Sanity	Test	sanity@cv.com	Pending Review and Approval	✓	RPDM CM 1			Tue Dec 14 2021 03:56:36 GMT-0500 (EST)	99 e mir

1. Click on the supplier to review and approve

Tips

Category Analyst Review - Clarify

Clarify during Review

Supplier
KYL A DSD UAT SUPPLIER PROFILE • ID: Supplier-20156382
CVS Reference ID : • Status : Pre-Active • Pay Name : KYLA DSD UAT • PO Name : KYLA DSD UAT • Primary Category : S2-OPTICAL • Type : Merchandise DSD • Sub Type : Domestic

Supplier Overview Address **Payment & Banking** Supply Chain Compliance Contact Documents Ownership Supplier Links Comments

Details

* Payment Group Weekly **1**

Are you a Supplier providing alcohol products to CVS using this new Supplier number?

Do you want Pcard capability for Payments?

* Payment Type CHECK

Are you ACH Capable?

Payment Terms **2**

Select all Clear all filters Add Payment Terms Remove Payment Terms

	Name	Short Desc	Discount %	Due Days	Net Days
<input type="checkbox"/>	1% DSC IN 21 DAYS; N22	12122	1.000	021	22

Number of items: 1; Selected items: 0

Preferred Payment Terms need Net 21 days

Factor Supplier

* Do you use a Factor Company for processing your payments? N

Save Fetch Valid Buyers Clarify Submit

Description / Steps

Click on the Payment and Banking tab

1. Click on Payment Group – select from the drop down
2. Click Add Payment Terms
3. Select the Payment Terms agreed upon from the drop down
 1. Delete old payment terms
4. Click the Comments Tab to add a note (This is required)

Tips

Next slide will outline how to add comments

Category Manager Clarify

Clarify during Review

Supplier
KYLA DSD UAT SUPPLIER PROFILE • ID: Supplier-20156382
CVS Reference ID : • Status : Pre-Active • Pay Name : KYLA DSD UAT • PO Name : KYLA DSD UAT • Primary Category : 52-OPTICAL • Type : Merchandise DSD • Sub Type : Domestic

Supplier Overview Address **2** Payment & Banking Supply Chain Compliance Contact Documents Ownership Supplier Links **1** Comments

Comments updated payment terms

Supplier Comments

Description / Steps

1. Click Comments Tab
2. Write comments to supplier
 1. This is required to send back to supplier to approve
3. Click Clarify
 1. Will go back to the supplier to approve
 2. Will go back to CM approve bucket for final approval to complete the setup

Tips

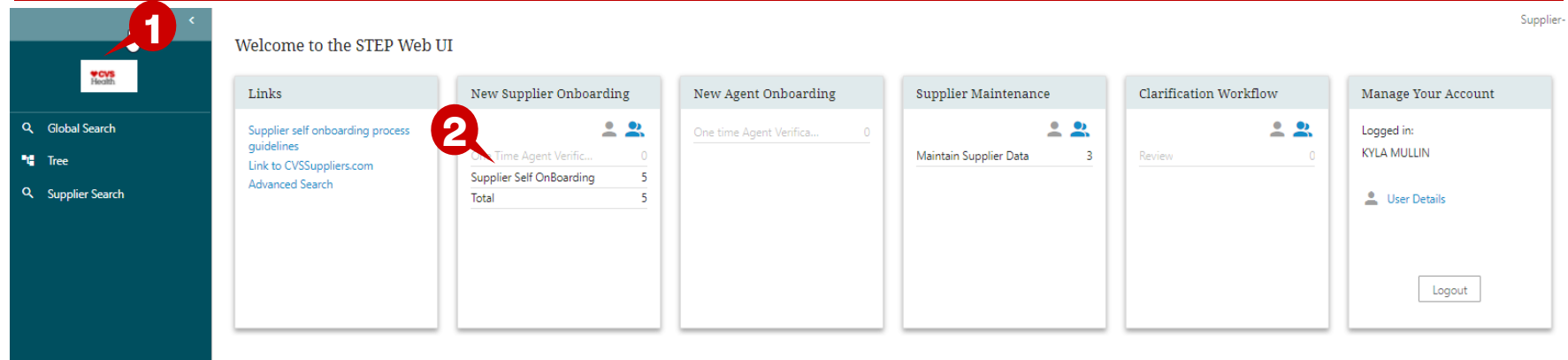
Next slides outline instructions for a supplier to whom updated payment terms have been sent

3 Save Fetch Valid Buyers Clarify Submit

Supplier Clarify – Onboarding

Supplier Clarify

Clarify after CM Review – Supplier approve Changes



Description / Steps

1. Click CVS logo to get to this home page
2. Click supplier Self Onboarding link
3. Click the supplier link to complete the onboarding

Supplier Creation - Supplier Self OnBoarding - Available

Clear all filters

ID	Supplier Name	Supplier Type	Supplier Sub Type	Status of Registration	Initiated By	Team Name	Date Of Entry	No Of days In Queue
Supplier-20156382	KYLA DSD UAT	Merchandise DSD	Domestic	Pending Supplier Response	RPDM CM 1	CVS Internal Team	Tue Mar 22 2022 10:14:59 GMT-0400 (EDT)	33 min
Supplier-20156388	KYLA UAT ALCOHOL DSD	Merchandise DSD	Alcohol	Pending Supplier Response	RPDM CM 1	CVS Internal Team	Tue Jan 25 2022 10:50:56 GMT-0500 (EST)	55 d 23 hrs 57 min
Supplier-20156389	KYLA ALCOHOL WHSE	Merchandise Warehouse	Alcohol	Pending Supplier Response	RPDM CM 1	CVS Internal Team	Tue Jan 25 2022 10:57:06 GMT-0500 (EST)	55 d 23 hrs 51 min
Supplier-20156394	KYLA IMPORT	Merchandise Warehouse	Imports / Direct Imports	Pending Supplier Response	RPDM CM 1	CVS Internal Team	Tue Jan 25 2022 10:58:59 GMT-0500 (EST)	55 d 23 hrs 49 min
Supplier-20981880	KYLA DSD 2	Merchandise DSD	Domestic	Pending Supplier Response	RPDM CM 1	CVS Internal Team	Mon Jan 31 2022 13:30:46 GMT-0500 (EST)	49 d 21 hrs 18 min

Tips

Supplier Clarify

Clarify after CM Review – Supplier approve Changes

Supplier KYLA DSD UAT

CVS Reference ID: • Status: Pre-Active • Pay Name: KYLA DSD UAT • PO Name: KYLA DSD UAT • Primary Category: S2-OPTICAL • Type: Merchandise DSD • Sub Type: Domestic

Supplier Overview Address **Payment & Banking** Supply Chain Compliance EDI SBT Contact Documents Ownership

Details

NOTE: If factor company or different pay supplier is linked then Payment Type, EDI Invoicing and Banking Attributes will be inherited from linked pay supplier or factor company on click of Save or Submit

EDI Invoicing N

EDI Begin Date

Are you a Supplier providing alcohol products to CVS using this new Supplier number?

Do you want Pcard capability for Payments?

Payment Type CHECK

Are you ACH Capable?

Payment Terms

Please confirm your choice by double-clicking and selecting "Y" on the CHOICE box against the Term.

If the offered Payment terms are not the agreed payment terms, please reach out to the Category Manager on the CVS team

Clear all filters

Choice	Name	Short Desc	Discount %	Due Days	Net Days
<input type="checkbox"/>	1% DSC IN 21 DAYS; N22	12122	1.000	021	22

Number of items: 1

Preferred Payment Terms need Net 21 days

Factor Supplier

Do you use a Factor Company for processing your payments? N

4 Save Submit Clone Supplier

Description / Steps

1. Click payment and banking
2. Click in choice and select Y
3. Remove the comments
4. Click submit

Set up will go back to the Category Analyst for Review and approval

Tips

Comments need to be removed before a supplier can click submit

If you don't remove the comments, you will get an error message

Upon submitting the approved terms, the request will go back to the CM workflow to review and approve