

RPDM: CM & Supplier Clarify



Category Manager Clarify – Onboarding

Category Analyst Review -Clarification

UAT MDM PORTAL

Quick Links

- Invite Supplier
- Advanced Search

Supplier Creation

| | |
|--------------------------|----|
| Complete Supplier Invit. | 1 |
| Category Analyst Review | 1 |
| CM Review And Approval | 1 |
| Total | 84 |

Category Manager Mainten...

| | |
|-------------------------|----|
| Category Manager Mai... | 14 |
|-------------------------|----|

Current User

Logged in:
RPDM CM 1

User Details

Logout

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@nancyneedle.com | Pending Review and Approval | ✓ | RPDM CM 1 | Nancy White | Supplier | Tue Feb 15 2022 17:08:35 GMT-0500 (EST) | 35 |
| <input type="checkbox"/> Supplier-16118305 | CHERYL 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 |
| <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 |
| <input type="checkbox"/> Supplier-16518348 | RAMAN - CLONING TESTING | Nancy | White | NancyWhite@nancyneedle.com | Pending Review and Approval | ☐ | RAMANGOUDA | Nancy White | Supplier | Wed Dec 22 2021 01:45:54 GMT-0500 (EST) | 91 |
| <input type="checkbox"/> Supplier-16584500 | TEST123 | Sanity | Test | sanity@cvs.com | Pending Review and Approval | ✓ | RPDM CM 1 | | | Tue Dec 14 2021 03:56:36 GMT-0500 (EST) | 99 |

1. Click on the supplier to review and approve

Tips

Category Analyst Review - Clarify

Clarify during Review

Supplier
KYL A 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 Contact Documents Ownership Supplier Links Comments

1

Payment Group: Weekly

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?

2

Payment Terms

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

3

Factor Supplier

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

4

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

Comments

Supplier Comments

3

Save Fetch Valid Buyers **Clarify** Submit

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

Supplier Clarify – Onboarding

Supplier Clarify

Clarify after CM Review – Supplier approve Changes

Welcome to the STEP Web UI

Supplier-

1 CVS Health

Global Search

Tree

Supplier Search

Links

- Supplier self onboarding process guidelines
- Link to CVSSuppliers.com
- Advanced Search

2 New Supplier Onboarding

- One time Agent Verifica... 0
- Supplier Self OnBoarding 5
- Total 5

New Agent Onboarding

- One time Agent Verifica... 0

Supplier Maintenance

- Maintain Supplier Data 3

Clarification Workflow

- Review 0

Manage Your Account

Logged in: KYLA MULLIN

User Details

Logout

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

3

| 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

SCREEN TEST 1

SUPPLIER PROFILE • ID: Supplier-7208884

CVS Reference ID: • Status: Pre-Active • Pay Name: SCREEN TEST • PO Name: SCREEN TEST • Primary Category: 98-SUPPLIE

Supplier Overview

Address

Payment & Banking

Supply Chain

Compliance

EDI

| | |
|---|--|
| Name of the Pay Supplier | |
| DBA | <input type="text" value="SCREEN TEST"/> |
| Doing Business As- Informational Only | |
| * Legal Status | <input type="text" value="C-Corporation"/> |
| The field defines the legal status of the supplier's company. | |
| * Product/Service Description | <input type="text" value="abd"/> |
| Please provide a brief description about the Product & Services that you plan to offer to CVS | |
| Supplier Status Date | 06-Jul-2022 |
| * Is this Supplier onboarding due to Merger? | N |
| * Supplier Manages Data | Y |
| Parent Supplier | N |
| CVS Comments | Please Select N30 as choice |
| Supplier Comments | <input type="text"/> |

Save

Submit

Clone Supplier

||

Description / Steps

1. CVS Comments are visible on the Supplier Overview tab. This indicates actions items communicated from CVS to a supplier

Tips

Supplier Clarify

Clarify after CM Review – Supplier approve Changes

Supplier
KYLE DSD UAT
CVS Reference ID: • Status: Pre-Active • Pay Name: KYL • 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. Click submit

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

Tips

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