B2BE Customer Centre User Guide

Business to Business e-Solutions

INDEX

Content **Page Number**

1 Logging In

You will be able to log into the Generic Web Portal through the B2BE Website (www.b2be.com).

You will be required to enter your Email Address and Password to log into the upgraded B2BE Customer Centre.

Please contact B2BE Support if you have any further queries regarding the upgrade B2BE Customer Centre.

2 Welcome to the Customer Centre

Once logged in, you will be taken to the Home Page.

These are the “anatomy” of the B2BE Customer Centre (Customer Centre).

Figure 2.1: Customer Centre home page

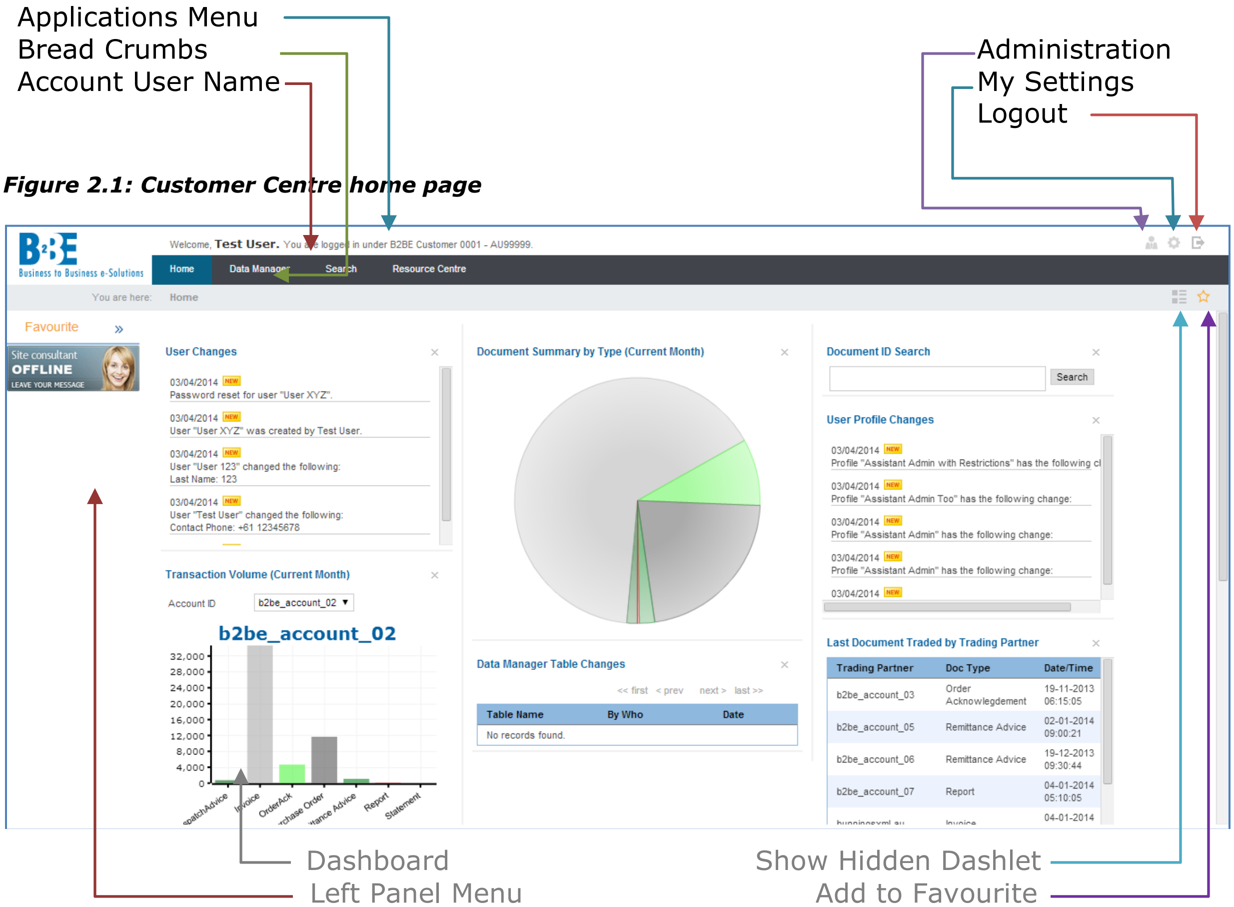


Table 2.1: Anatomy of the B2BE Customer Centre

Parts	Description
Account User Name	Displays the first and last name of the user account currently logged in.
Applications Menu	Displays the list of application that the current user account has access to.
Bread Crumbs	Displays the path of the current location in the Customer Centre. Click on a module listed on the bread crumb to go to that module.
Administration	Administration icon to access the Administration module.
My Settings	My Settings icon to access the My Settings module.
Help	Plays the walk-through guide for the current page.
Logout	Logs out from Customer Centre.
Left Panel Menu	Displays the list of Favourite and the list of sub-modules once

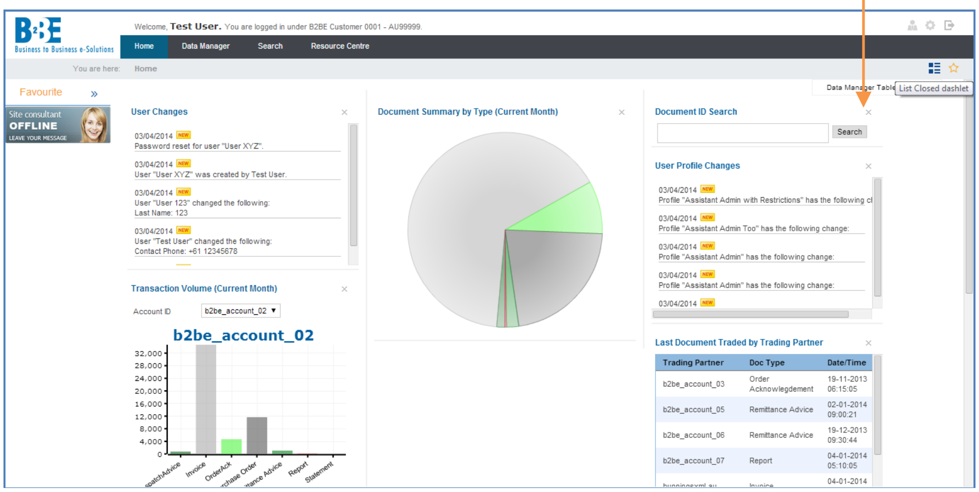
Parts	Description
	inside a module or application.
Dashboard	Shows the summary info from multiple applications (via dashlets) into a unified display. Please refer to "Section 2.1 Customizing the Dashboard" to learn how to modify the Dashboard according to your need.
Show Hidden Dashlet	Displays the list of dashlets that are still hidden (not yet displayed on the Dashboard). Hidden dashlets can then be ticked and therefore shown on the Dashboard.
Add to Favourite	Adds or removes a page from the Favourite list shown on the Left Panel. - To add a page to Favourite list, navigate to the page to be added then click on the icon. - To remove a page from the Favourite list, click on the corresponding link under the Favourite on the Left Panel, click on the icon then click the Remove link. - To modify the name of the page to be displayed on the Favourite list, click on the corresponding link under the Favourite on the Left Panel, then click on the icon then modify the page name in the Name field and click the Done button to commit the change.

2.1 Customising the Dashboard

The Dashboard is where a collection of dashlets are displayed. Each dashlet displays different summary information from multiple applications while some are shortcut functions to provide ease of use to the users.

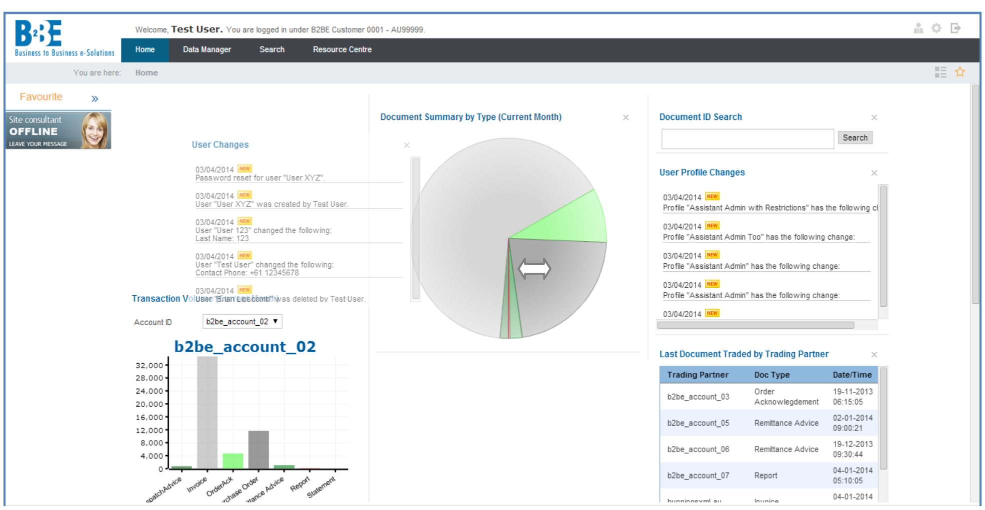
- To remove a dashlet from the Dashboard, click on the corresponding X of the dashlet to be removed.
- To add a dashlet to the Dashboard, click on the Show Hidden Dashlet icon to see the list of dashlets that are still hidden and therefore not yet shown on the Dashboard. Then click on the one that you want to be shown on the Dashboard.

Figure 2.2: Removing and adding dashlets



- To sort or move the dashlets around the Dashboard, just click on the space between the name of the dashlet and the X then drag to the new position where you want to put it.
- To adjust the sizes of the dashlets, the size of the columns on the Dashboard will have to be adjusted. Position the mouse over the edge of the column until ⟺ appears then drag to expand or reduce the column into the appropriate size you want it to be.

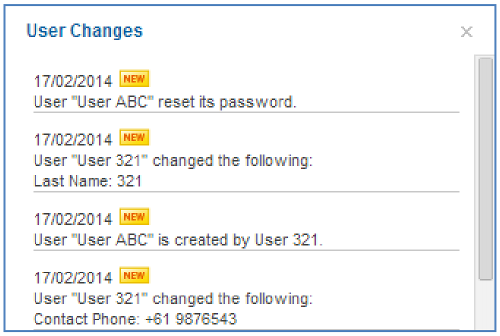
Figure 2.3: Sorting and adjusting sizes of dashlets



2.2 Dashlets

2.2.1 User Changes

The User Changes dashlet will show any changes done in User Maintenance module by the Customer Admin. Whether it's adding, editing and removing user accounts.

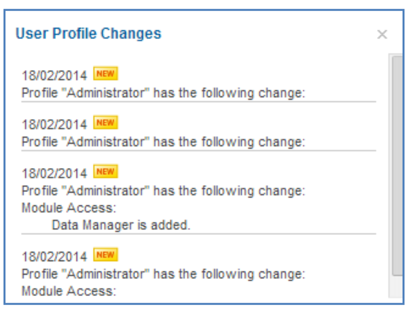


Admin User will see all the changes of all user accounts within the company as well as the changes made to his own user account.

While the non-Admin users will only see changes made to his own user account.

2.2.2 User Profile Changes

The User Profile Changes dashlet will show any changes done in the Profile Maintenance module by the Customer Admin. Whether it's adding, editing and removing access permissions of module, function, field or data from the profiles that is assigned to the user account.

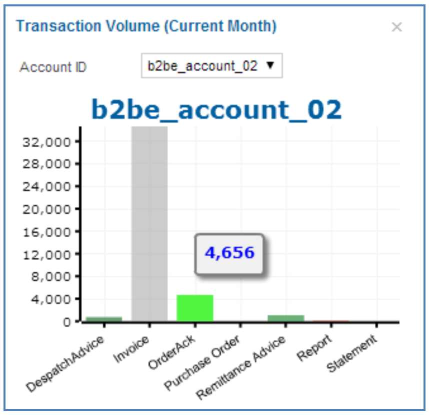


2.2.3 Search Document

The Search Document dashlet is a shortcut where the user can key in specific Document ID (single or multiple) and search for it. The user will be redirected to the Search application where the search result will be displayed.

2.2.4 Transaction Volume (Current Month)

The Transaction Volume (Current Month) dashlet shows the volume number of each document type per Trading Partner for the current month.

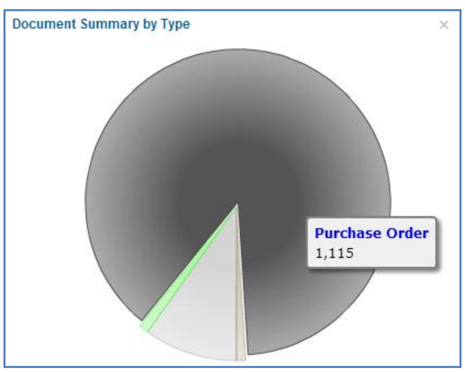


Choose a Trading Partner from the dropdown to see the transaction volume related to it.

Mouse-over any of the bar on the chart to see the actual volume count for that specific document type.

2.2.5 Document Summary by Type

The Document Summary by Type dashlet shows the volume number of each document type per company for current month.



Mouse-over any section of the pie chart to see the actual volume count for that specific document type.

2.2.6 Last Document Traded by Trading Partner

The Last Document Traded by Trading Partner dashlet shows the list of trading partners and the last document traded with the date and time stamp and document type.

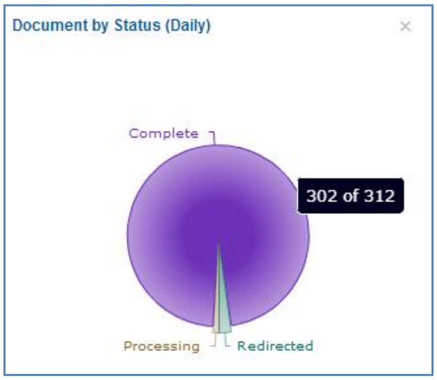
Last Document Traded by Trading Partner

Trading Partner	Doc Type	Date/Time
b2be_account_03	Order Acknowlegdement	19-11-2013 06:15:05
b2be_account_05	Remittance Advice	02-01-2014 09:00:21
b2be_account_06	Remittance Advice	19-12-2013 09:30:44
b2be_account_07	Report	04-01-2014 05:10:05

Click the column header to sort the content by that column either ascending or descending. Columns can be sorted by Trading Partner, Doc Type, Date and Time.

2.2.7 Document by Status (Daily)

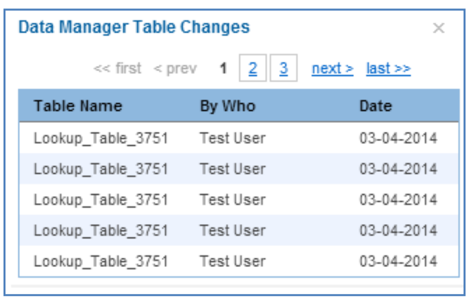
The Document by Status dashlet shows the document volume by status on a daily basis presented in a pie chart.



Mouse-over a portion of the pie chart to see the exact volume number of documents in that status.

2.2.8 Data Manager Table Changes

The Data Manager Table Changes dashlet shows all the updates made on all the lookup tables.


Data Manager Table Changes

<< first < prev 1 2 3 next > last >>

Table Name	By Who	Date
Lookup_Table_3751	Test User	03-04-2014
Lookup_Table_3751	Test User	03-04-2014
Lookup_Table_3751	Test User	03-04-2014
Lookup_Table_3751	Test User	03-04-2014
Lookup_Table_3751	Test User	03-04-2014

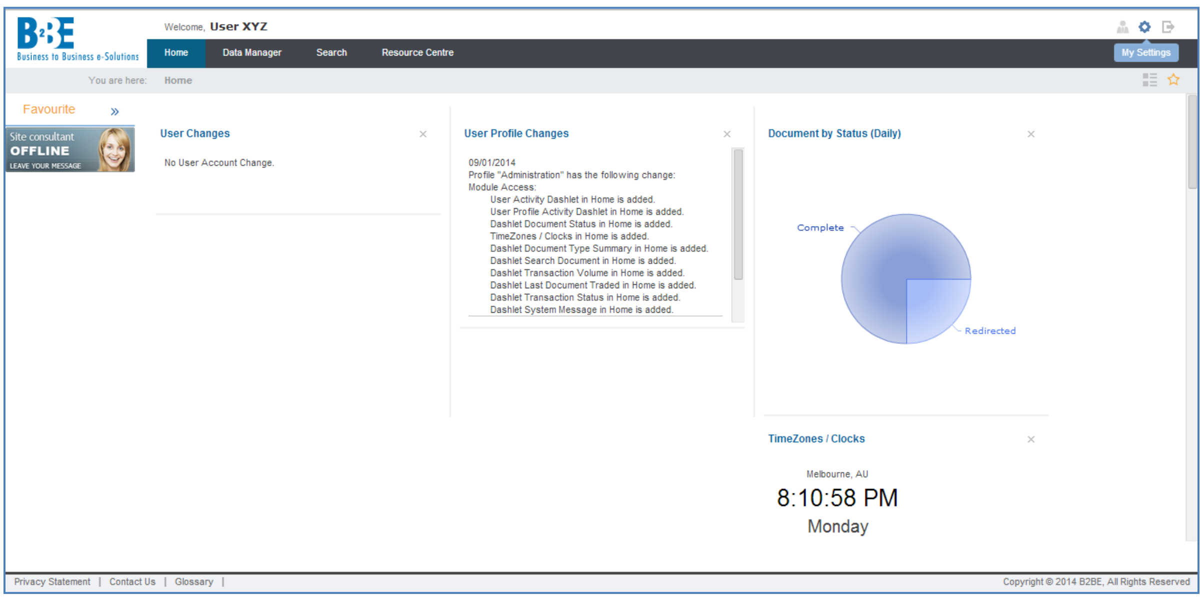
3 My Settings

The My Settings module contains the following sub-modules:

- Accounts: This will show the Customer Centre user account details of the account used to log into Customer Centre. And this is also where the Customer Centre user account information can be modified.
- Display: This is where the display options of Customer Centre can be defined by the user.

To get to the My Settings module, look for the gear icon on the upper right corner of the page and click it.

Figure 3.1: Getting to my settings



This will take you inside the My Settings module.

3.1 My Settings > Account

Once inside the My Settings module, you will automatically be taken to the Account sub-module by default.

The Accounts sub-module is where you can view and modify your account information.

Figure 3.1.1: Account sub-module

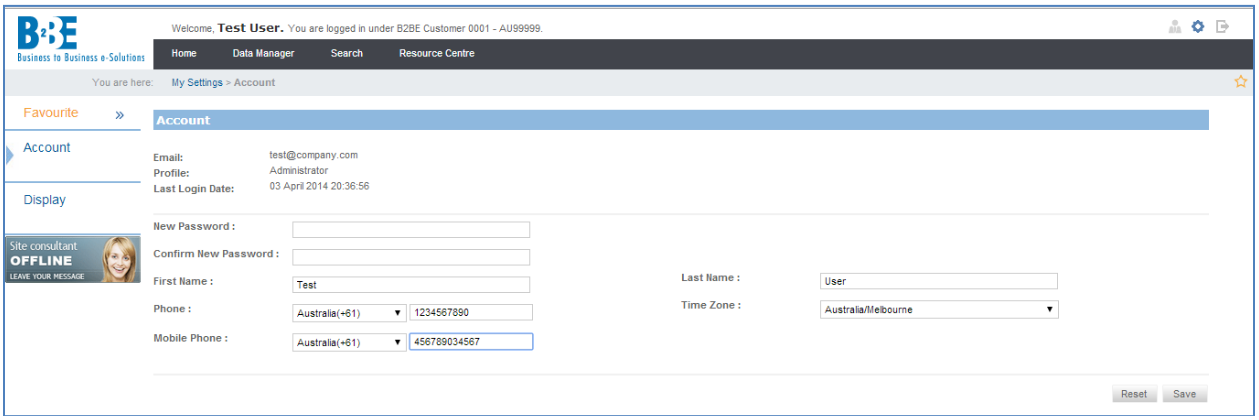


Table 3.1.1: Account sub-module fields

*Mandatory Field

Field Name	Description
Email (view only)	The account email address used to log into Customer Centre.
Profile (view only)	These are the list of user permissions assigned to the user account. These determine which modules or functions your user account have access to. This is maintained by the Administrator.
Last Login Date (view only)	The date that was logged as your last login activity.
New Password	This is where the new password can be keyed in to replace the current one.
Confirm Password	Re-key the new password to confirm.
First Name*	First name of the account user. To edit, just delete the current content and key in the new First Name.
Phone*	Phone number of the account user. To edit, select the Country Code from the dropdown and type the new phone number in the text field beside it.
Mobile Phone	Mobile phone number of the account user. To edit, select the Country Code from the dropdown and type the new mobile phone number in the text field beside it.
Time Zone*	Time zone of the account user. To edit, just select the new Time Zone from the dropdown.

Table 3.1.2: Account Sub-module buttons

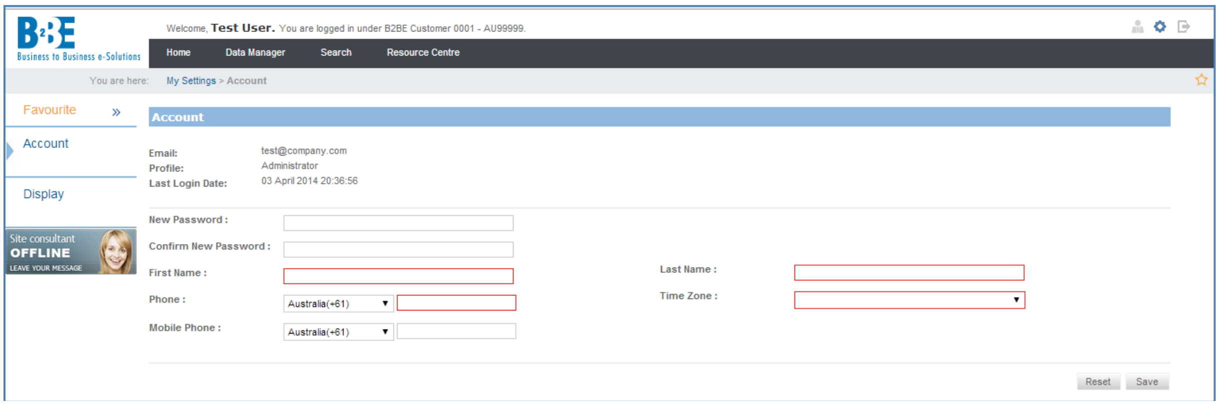
Buttons	Functions
Save	Found on the bottom right of the Accounts sub-module screen. Click the Save button to commit the changes to the data that has been made on the Account sub-module fields.
Reset	Found on the bottom right of the Accounts sub-module

	screen. Click the Reset button to reset all the data on the Accounts Sub-module to the previously saved data.

When you are done with the editing of the Account information, you can click on the Save button to commit the changes.

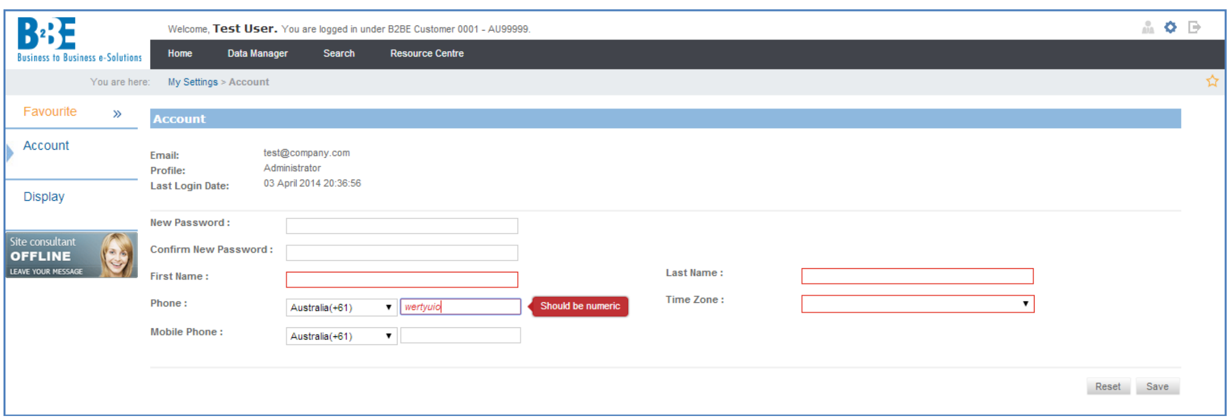
The system will validate if all the mandatory fields (marked with * in the table above) have been keyed in once the Save button has been clicked. The system will outline the fields that have failed the validation in RED. And when the RED field is clicked, the error message "Should not be empty" will also be displayed which means the field is mandatory.

Figure 3.1.2: Validation in accounts sub-module

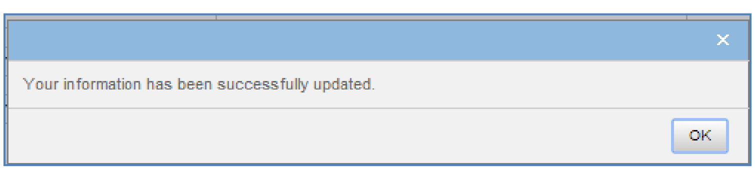


Other kinds of error messages will be displayed accordingly when the user clicks on a RED field with wrong formatting like "Should be numeric", "Should be characters from a-z", etc.

Figure 3.1.3: Error messages during validation in accounts sub-module



Once the Saved button is clicked and all the fields have passed the validation, a pop-up message will appear saying "Your information has been successfully updated." Just click the OK button to go back to the main screen.



3.2 My Settings > Display

The Display sub-module under the My Settings module is where the display options of Customer Centre can be set by the user.

To get to the Display sub-module, click on the gear icon on the upper right corner of the page to get into the My Settings module and then click on the "Display" tab on the left panel.

Figure 3.2.1: Display sub-module

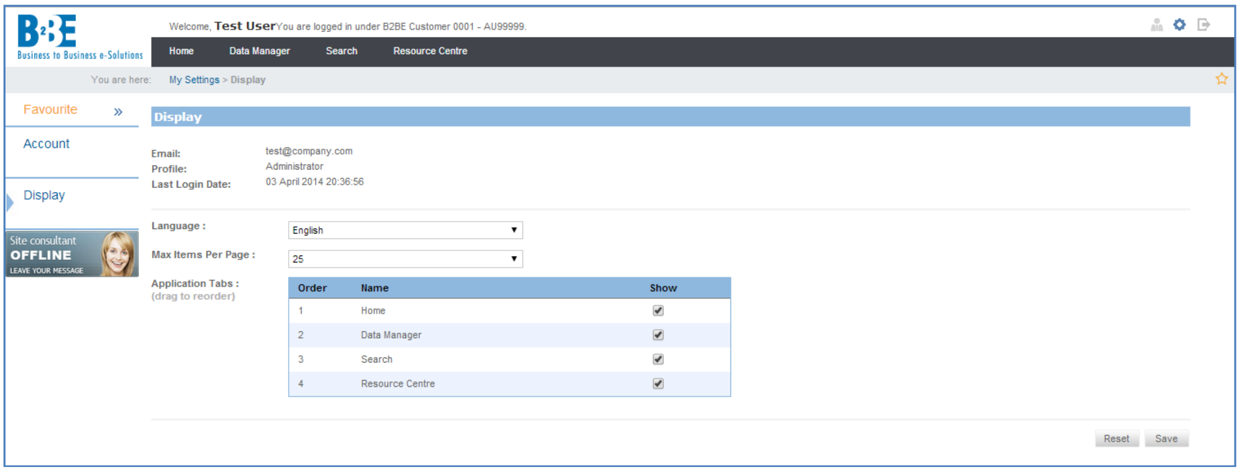


Table 3.2.1: Display sub-module fields

* Mandatory Field

Field Name	Description
Email (view only)	The account email address used to log into Customer Centre.
Profile (view only)	These are the list of user permissions assigned to the user account. These determine which modules or functions your user account have access to. This is maintained by the Administrator.
Last Login Date (view only)	The date that was logged as your last login activity.
Language	The language used for the display of the Customer Centre. Click on the dropdown to select other languages to be used.
Max Item Per Page	The maximum number of line items to be displayed per page on any tables in any modules of Customer Centre.
Application Table	List of Customer Centre Applications that the current log in account has access to. Tick or untick accordingly to hide or unhide the corresponding Applications. Drag an Application upwards or downwards to sort the sequence of display on the Applications Menu accordingly.

Table 3.2.2: Display sub-module buttons

Buttons	Functions
Save	Found on the bottom right of the Display sub-module screen. Click the Save button to commit the changes to the data that has been made on the Display sub-module fields.

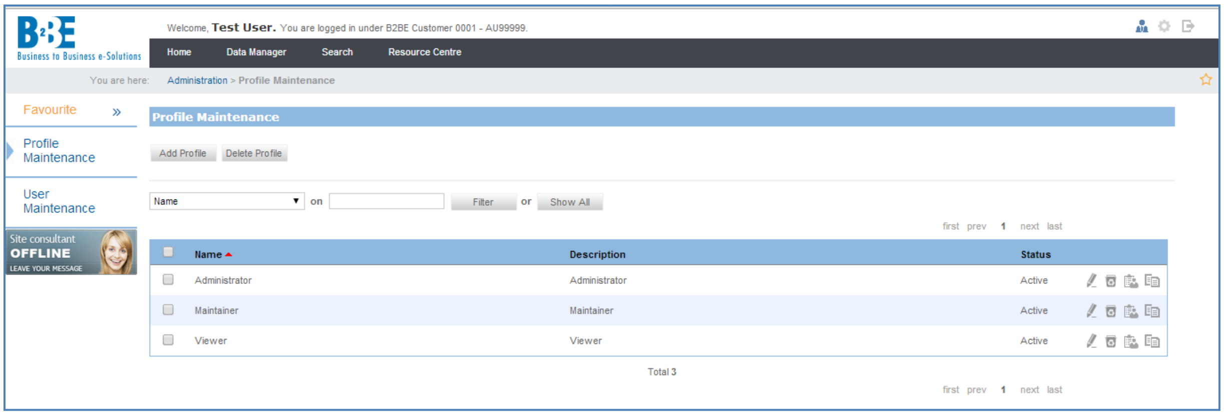
Reset	Found on the bottom right of the Display sub-module screen. Click the Reset button to reset all the data on the Display Sub-module to the previously saved data.

4 Administration

The Administration module is where the User Administrator can create and maintain user accounts and where he can configure the permissions and access rights to applications and functions for each of the users he created.

To get to the Administration module, click on icon on the upper right corner of the page.

Figure 4.1: Administration module



The Administration module contains the following sub-modules as shown on the Left Panel menu:

- Profile Maintenance: This is where permissions to access applications, functions and the access rights to specific data are maintained.
- User Maintenance: This is where the User Administrator can create new user accounts, delete existing user accounts and maintain user account information.

4.1 Administration > User Maintenance

Once inside the Administration module, you will automatically be taken to the Profile Maintenance sub-module by default.

To get to the User Maintenance module, click on the User Maintenance on the Left Panel Menu.

Figure 4.1.1: User maintenance

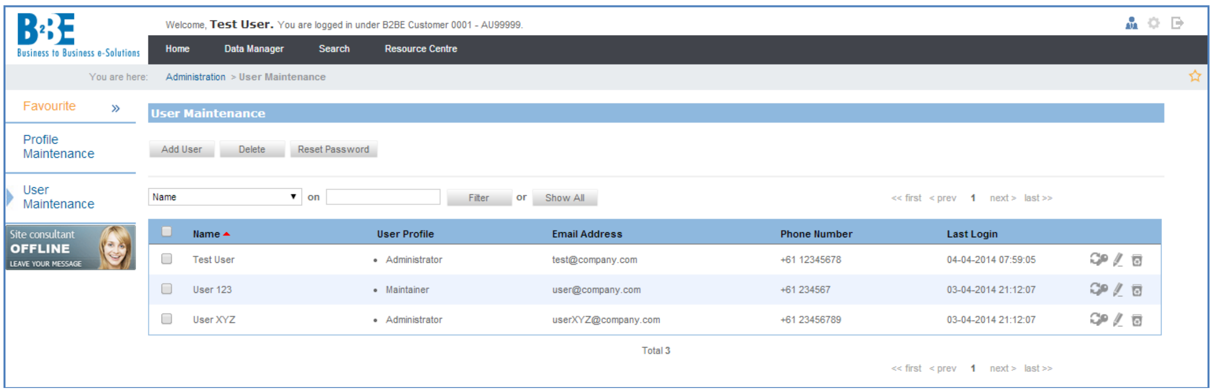


Table 4.1.1: User maintenance fields

Field Name	Description
Name	Name of the user account.
User Profile	List of profiles (access rights and permissions) assigned to the user account.
Email Address	Registered email address of the user account.
Phone Number	Phone number of the user account.
Last Login	Time and date stamp of the last login by the user account.

Table 4.1.2: User maintenance buttons

Buttons	Functions
Add User	Found on the upper left of the User Maintenance sub-module screen. Click the Add User button to create a new user account. Please refer to section 4.1.1 Add a User Account.
Delete	Found on the upper left of the User Maintenance sub-module screen. Select the corresponding tickbox of the user account and click the Delete button to delete it. Please refer to section 4.1.2 Delete a User Account.
Reset Password	Found on the upper left of the User Maintenance sub-module screen. Select the corresponding tickbox of the user account and click the Reset Password button. Please refer to section 4.1.3 Reset Password of a User Account.

4.1.1 Adding a User Account

To create a new user account, click on the Add User button found at the upper left of the User Maintenance sub-module screen. The Add User pop-up screen will appear

Figure 4.1.1.1: Add user page

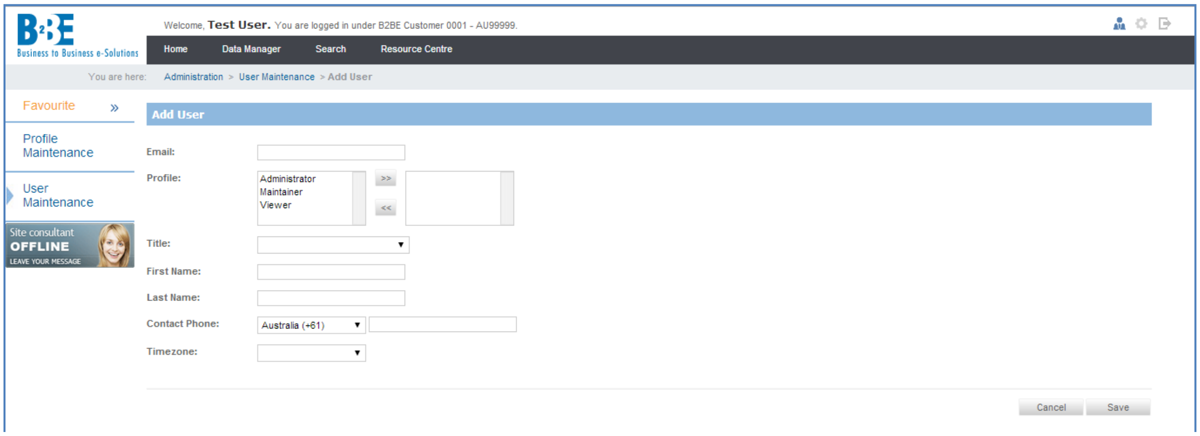


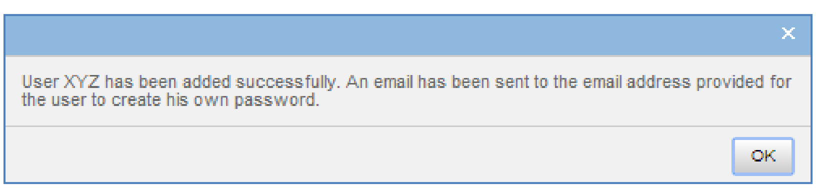
Table 4.1.1.1: Add user fields

Field Name	Description
Email Address	Registered email address of the user account.
User Profile	List of user profiles (access rights and permissions) assigned to the user account.
Title	Salutation for the user. Choices of Mr. Ms. and Mrs.
First Name	First name of the user.
Last Name	Last name of the user
Contact Phone	Phone number of the user account.
Time Zone	Time zone of the user.

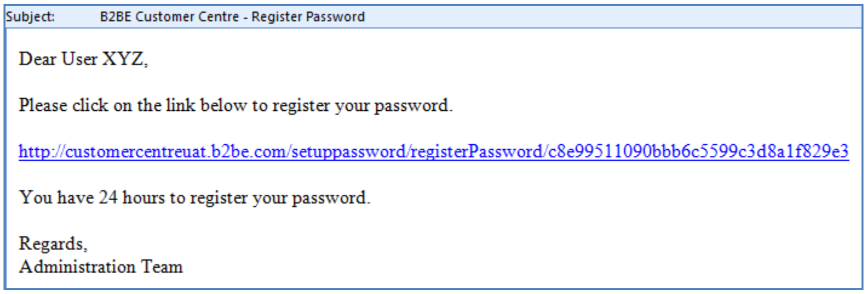
Table 4.1.1.1: Add user screen buttons

Buttons	Functions
Save	Found on the bottom right of the Add User screen. Click the Save button to save the data and create the new user account.
Cancel	Found on the bottom right of the Add User screen. Click the Cancel button to exit the Add User screen without saving any keyed in data.

Once all the user information has been keyed into the Add User screen. Click Save and a popup will appear once the user account has been successfully created.



An email notice will be sent to the newly added user. The new user will have to click the link provided in the email within 24 hours to register the new user password.


Subject: B2BE Customer Centre - Register Password

Dear User XYZ,

Please click on the link below to register your password.

http://customercentreuat.b2be.com/setuppassword/registerPassword/c8e99511090bbb6c5599c3d8a1f829e3

You have 24 hours to register your password.

Regards,
Administration Team

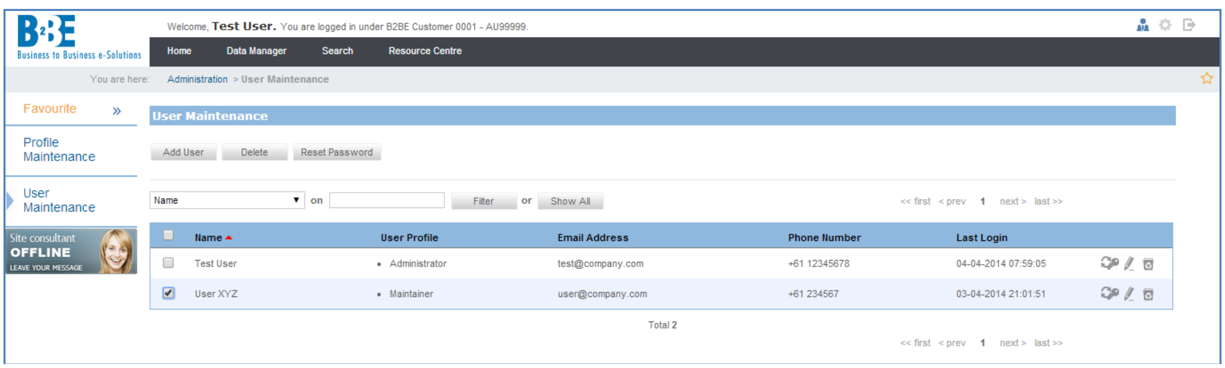
4.1.2 Delete a User Account

There are two (2) ways to delete a user account.

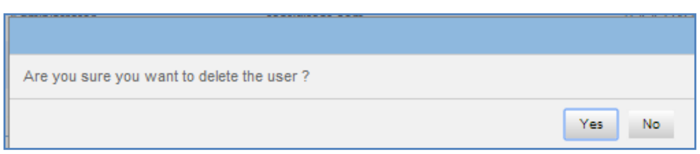
Option 1: Select the corresponding tickbox of the user account to be deleted then click on the Delete button found at the upper left of the User Maintenance sub-module screen to delete it. Use this option if you are resetting passwords of multiple user accounts.

Option 2: Click the corresponding Delete icon of the user account whose password is to be reset.

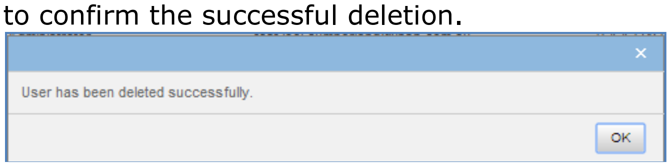
Figure 4.1.2.1: Delete a user account



A popup screen will appear to confirm if you want to proceed to delete the user account. Click Yes to confirm deletion. Click No to cancel deletion.



If Yes is clicked, another popup screen will appear once the user account has been deleted to confirm the successful deletion.



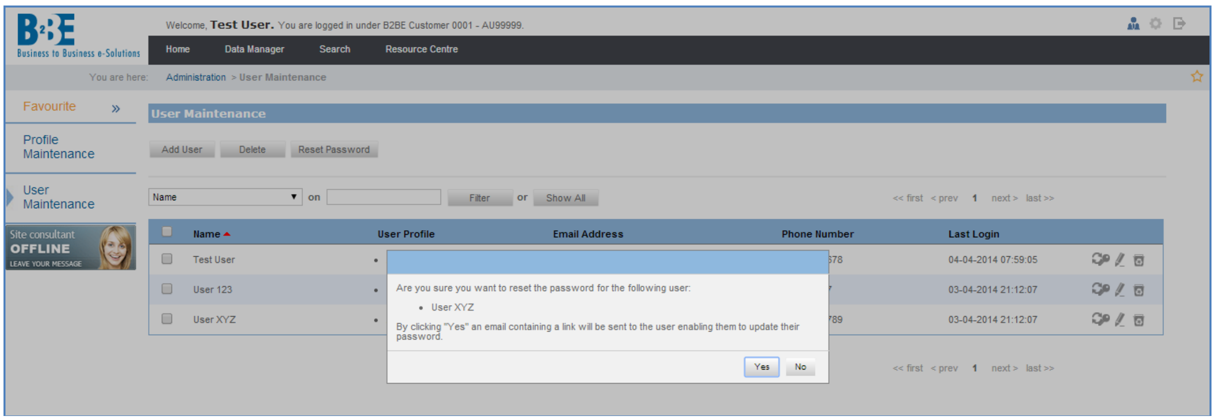
4.1.3 Reset Password of a User Account

There are two (2) ways to reset the password of a user account.

Option 1: Select the corresponding tickbox of the user account whose password is to be reset then click on the Reset Password button found at the upper left of the User Maintenance sub-module screen. Use this option if you are resetting passwords of multiple user accounts.

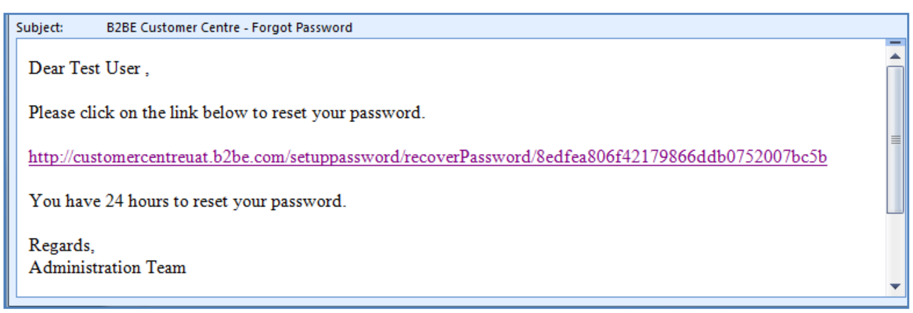
Option 2: Click the corresponding Reset Password icon  of the user account whose password is to be reset.

Figure 4.1.2.1: Delete a user account



To reset the password, the system will send an email to the registered email address of the selected user account containing a link that the user can use to key in a new password. A popup will appear to confirm if the User Admin wants to proceed with the sending of the email. Click Yes to proceed and send the email. Click No to cancel.

Once the reset password email(s) have been sent, a popup will appear to confirm the successful sending.



Subject: B2BE Customer Centre - Forgot Password

Dear Test User ,

Please click on the link below to reset your password.

http://customercentreuat.b2be.com/setuppassword/recoverPassword/8edfea806f42179866ddb0752007bc5b

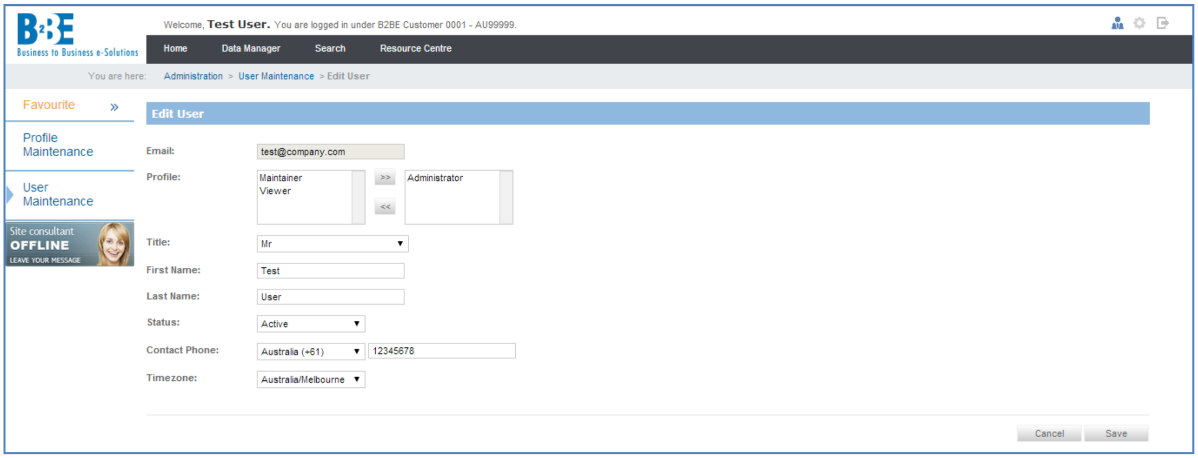
You have 24 hours to reset your password.

Regards,
Administration Team

4.1.4 Edit a User Account

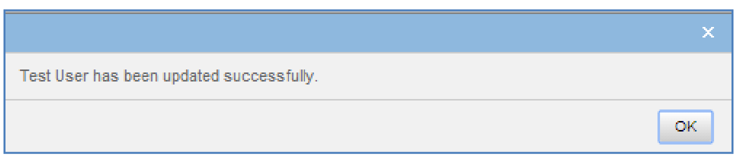
To edit the information of an existing user account, click on the corresponding Edit icon  of the user account to be edited.

Figure 4.1.4.1: Edit a user account



After modifying the user information accordingly, click on the Save button to commit the changes or click Cancel to exit the Edit User screen without saving the changes.

Once the user information has been saved successfully, a popup message will appear to confirm it.

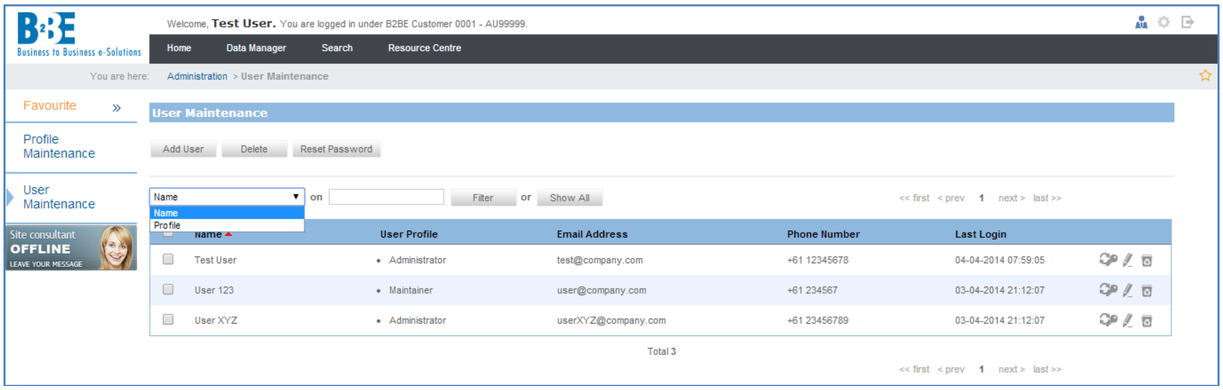


4.1.5 Search/Filter User Account

User Admin can search or filter user accounts either by Name or Profile.

To search/filter, select the filter from the dropdown and then type the value to be searched for in the textbox and click the Filter button. Click the Show All button to cancel the filtration.

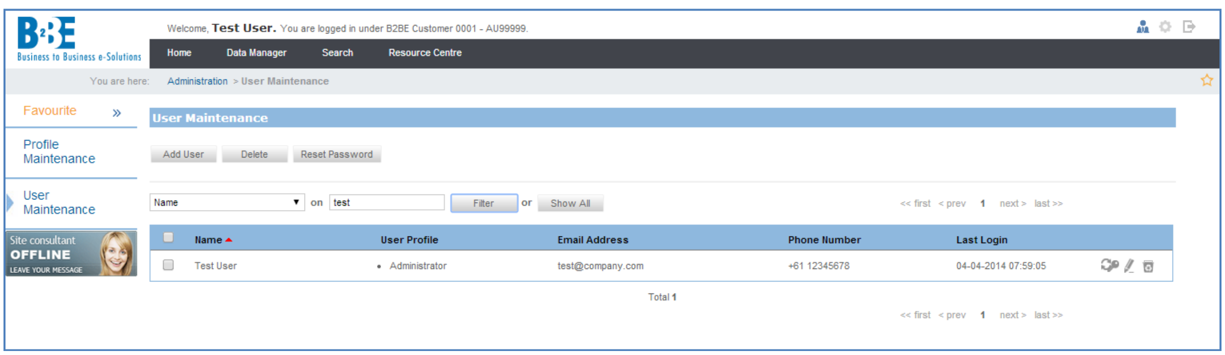
Figure 4.1.5.1 Search/filter user account



In the User Maintenance module, the user can filter by Name or by Profile.

The result of the filter will then be shown on the table below.

Figure 4.1.5.2: Search/filter results of user account



4.2 Administration > Profile Maintenance

This Profile Maintenance is where permissions to access applications and functions and the access rights to specific data are maintained.

To get to the Administration module, click on icon on the upper right corner of the page. Once inside the Administration module, you will automatically be taken to the Profile Maintenance sub-module by default. Or you can click on Profile Maintenance on the Left Panel Menu.

Figure 4.2.1: Profile maintenance

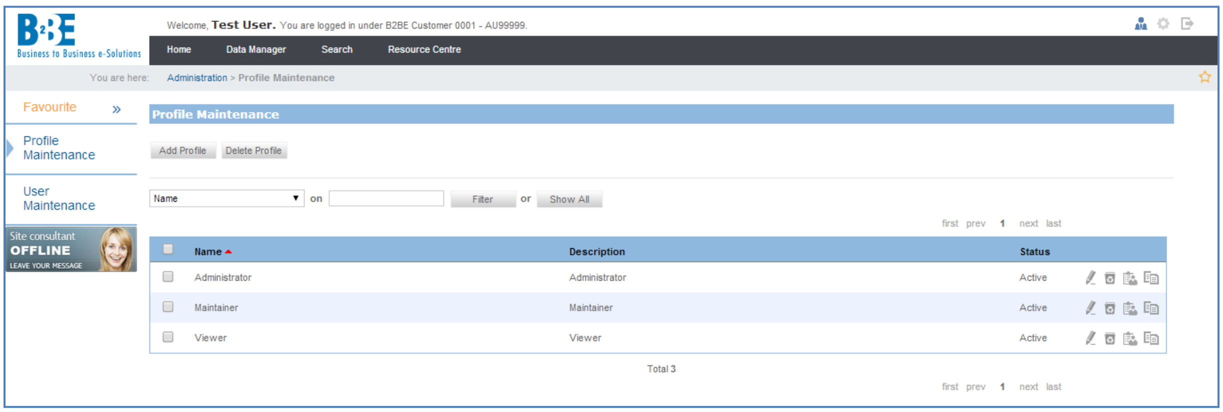


Table 4.2.1: Profile maintenance fields

Field Name	Description
Name	Name of the profile.
Description	Description of the profile.
Status	Status of the profile. Active or Inactive. Active profiles can be assigned to user accounts while Inactive profiles cannot be assigned to user accounts.

Table 4.2.2: Profile maintenance buttons

Buttons	Functions
Add Profile	Found on the upper left of the Profile Maintenance sub-module screen. Click the Add Profile button to create a new profile. Please refer to section 4.2.1 Add a New Profile.
Delete Profile	Found on the upper left of the Profile Maintenance sub-module screen. Select the corresponding tickbox of the profile to be deleted and click the Delete button to delete it. Please refer to section 4.2.2 Delete a Profile.

There are 3 pre-set profiles that can be assigned to user accounts:

Profile	List of Permissions
Administrator	• Home (with Dashlets) • Search (Document) • Resend (Document)

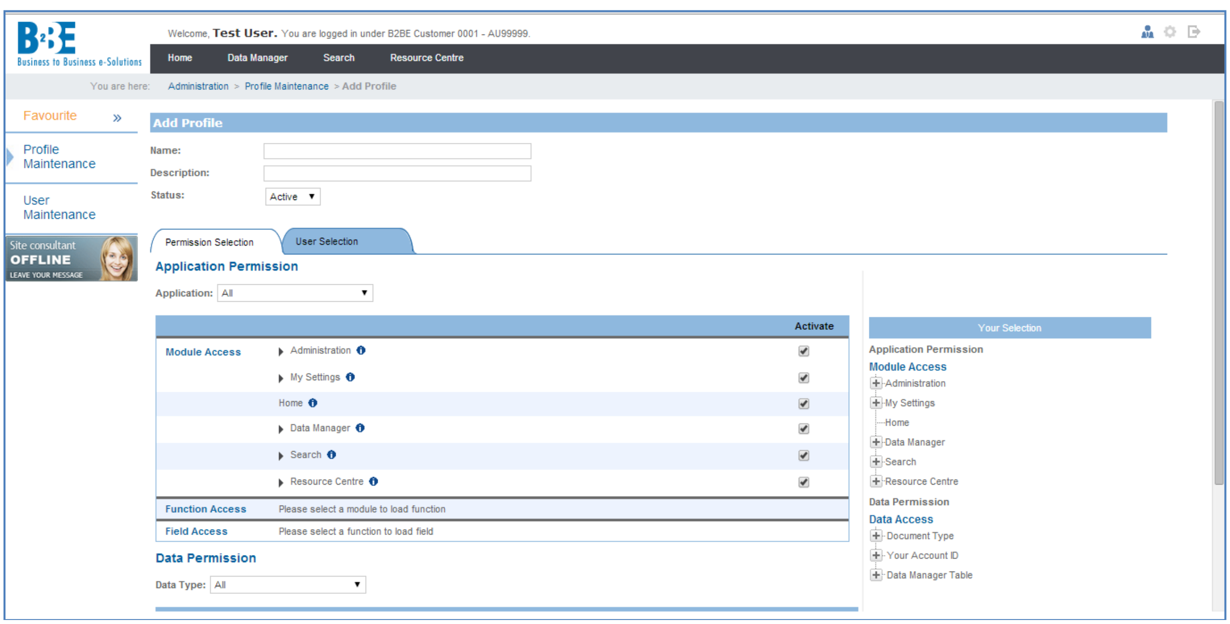
	• Administration (Profile and User Maintenance) • Resource Centre • Data Manager (With access to ALL B2BE Accounts, Document Type and Lookup Tables that belong to the Company.)
Maintainer	• Home (with Dashlets) • Search (Document) • Resend (Document) • Resource Centre • Data Manager (With access to ALL B2BE Accounts, Document Type and Lookup Tables that belong to the Company.)
Viewer	• Home (with Dashlets) • Search (Document) • Resource Centre

To be able to assign access to specific (not ALL) B2BE Accounts, Document Type and Lookup Tables only to Maintainer and Viewer user accounts, a customized profile will have to be created by copying the pre-set Maintainer and Viewer profiles and edit the Data Permission section accordingly. Please refer to section 4.2.5 Copy a Profile.

4.2.1 Add a New Profile

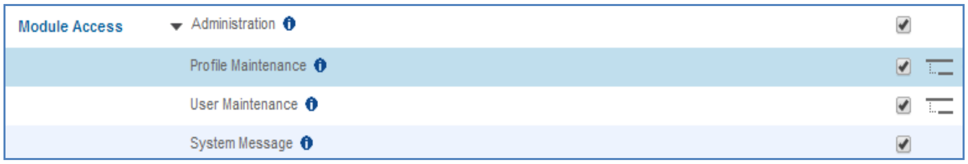
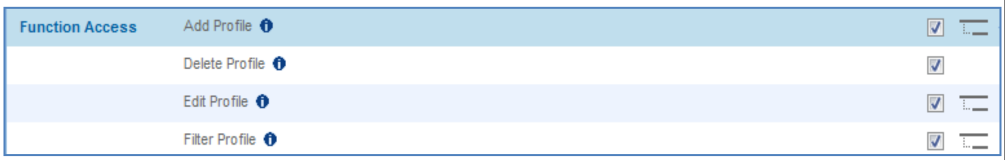
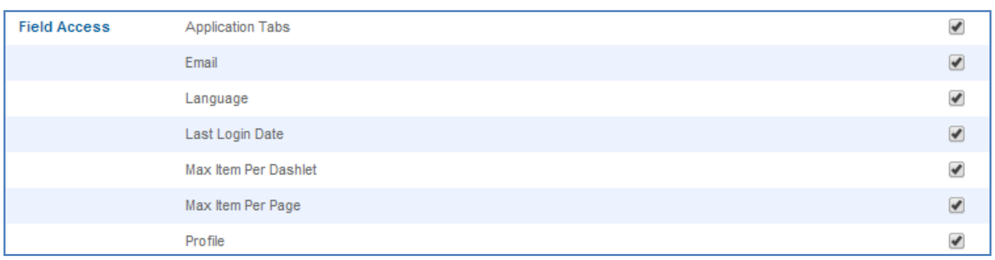
To add a new profile, click on the Add Profile button on the Profile Maintenance screen.

Figure 4.2.1.1: Add profile



Once in the Add Profile screen, the default is that all Application and Data Permissions are pre-ticked. The User Administrator can un-tick the corresponding tickboxes of the specific modules, functions, fields or data that he wants to remove from that profile's access permission.

Table 4.2.1.1: Add profile fields

Field Name	Description
Name	Name of the profile.
Description	Description of the profile.
Status	Status of the profile. Active or Inactive. Active profiles can be assigned to user accounts while Inactive profiles cannot be assigned to user accounts.
Application Permission	• Module Access - Enables the User Administrator to determine which module will be made available for a profile. The User Administrator can un-tick the corresponding tickboxes of the Module to remove it from the list of modules that the profile can access. Click on the icon of a ticked Module to load its functions configuration under the Function Access section.  • Function Access - Enables the User Administrator to manage and determine the functions to be made available for a profile. Upon selecting a particular module in the Module Access section, the Function Access section will list all functions available in the selected module. The User Administrator can tick the corresponding tickboxes of the Function to remove it from the list of Functions that the profile can access. Click on the icon of a ticked Function to load its fields under the Field Access section.  • Field Access - Similar to the Module and Function access, all fields including the mandatory fields will be listed. Only non-mandatory and non-critical fields are configurable by the User Administrator. By default if the Function checkbox is ticked for activation, all fields under it will be pre-ticked. The User Admin can only un-tick any non-mandatory fields. 
Data	Data Access – Enables the User Administrator to manage and determine

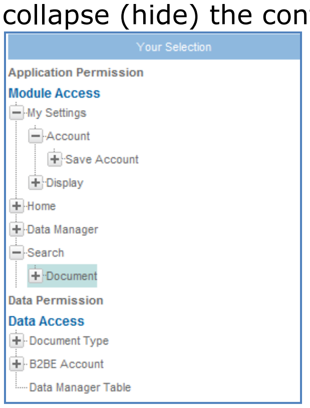
<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Permission</td><td>

which B2BE Accounts, Document Type and Lookup Tables (under Data Manager) will be accessible by a profile.

</td></tr>
<tr><td>Your Selection</td><td>

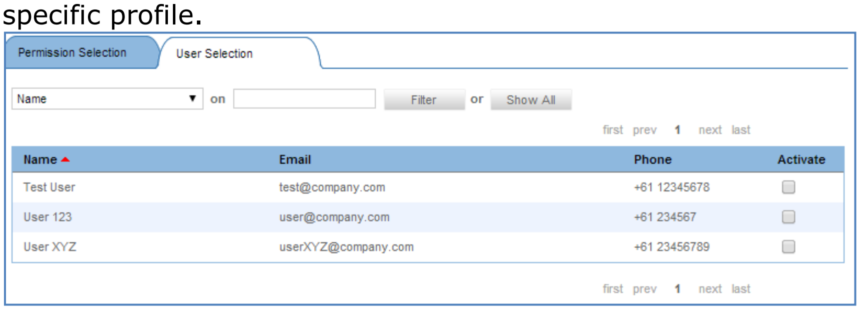
Shown on the right side of the Add Profile screen. It displays the summary of all the permissions that has been selected for this profile.

Click on the corresponding + or − buttons to expand (show) or collapse (hide) the contents.



</td></tr>
<tr><td>User Selection</td><td>

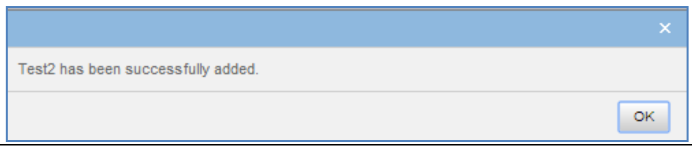
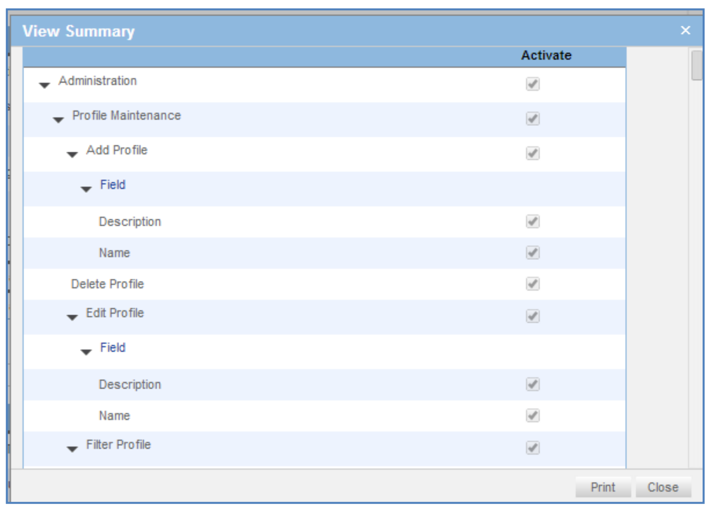
This is where user accounts can be assigned to a profile by ticking the corresponding tickboxes of the user accounts to be assigned with this specific profile.



The list of user accounts can be filtered/searched by Name or Email address by choosing the filter from the dropdown and typing the value in the text box then click the Filter button to do the search. Click the Show All button to clear the filter and show all the user accounts.

</td></tr>
</table>

Table 4.2.1.2: Add profile buttons

Buttons	Functions
Reset	Found on the bottom right of the Add Profile screen. Click the Reset button to revert the status of the tickboxes back to the default state of all tickboxes being ticked.
Cancel	Found on the bottom right of the Add Profile screen. Click the Cancel button to exit the Add Profile screen without saving any profile.
Save	Found on the bottom right of the Add Profile screen. Click the Save button to create a new profile with the ticked permissions. Once the system has successfully added the new profile, a popup will appear to confirm it. Click OK to continue. 
View Summary	Found on the bottom right of the Add Profile screen. Click the View Summary button to see a list of all the permissions that have been selected for that profile displayed in a popup screen.  Click the Print button to print out a hardcopy of the selected permissions. Click the Close button to close the popup screen.

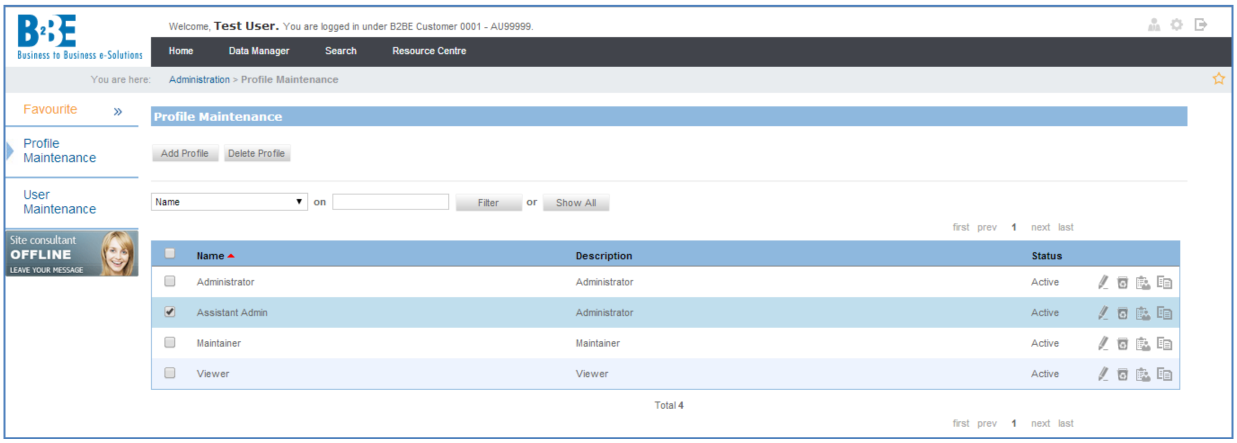
4.2.2 Delete a Profile

There are 2 ways to delete profiles:

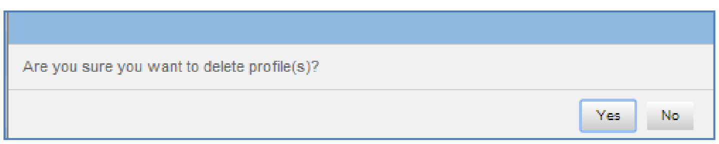
Option 1: Click the corresponding Delete icon of the profile that is to be deleted.

Option 2: Tick the corresponding tickbox of the profile to be deleted then click the Delete button. Multiple profiles can be selected for deletion at the same time by ticking the corresponding tickboxes of the profiles to be deleted then click the Delete button.

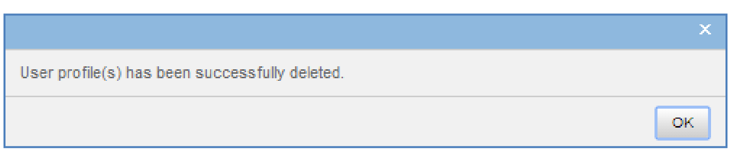
Figure 4.2.2.1: Delete a profile



Once the Delete button is clicked, a popup will appear to ask User Administrator to confirm the deletion of the selected profile(s). Click Yes to confirm deletion, click NO to cancel deletion.



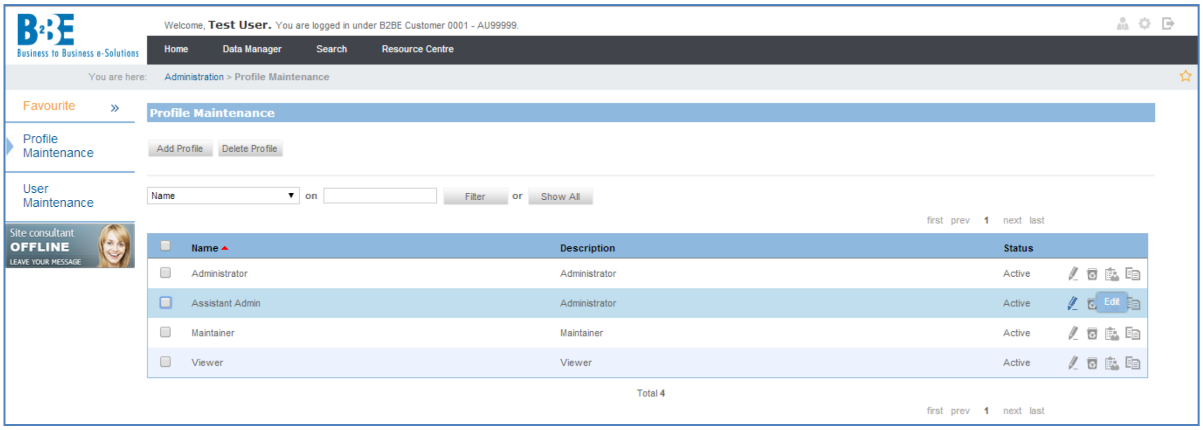
Once Yes is clicked and the selected profiles have been deleted, a popup will appear to confirm the successful deletion. Click OK to proceed.



4.2.3 Edit a Profile

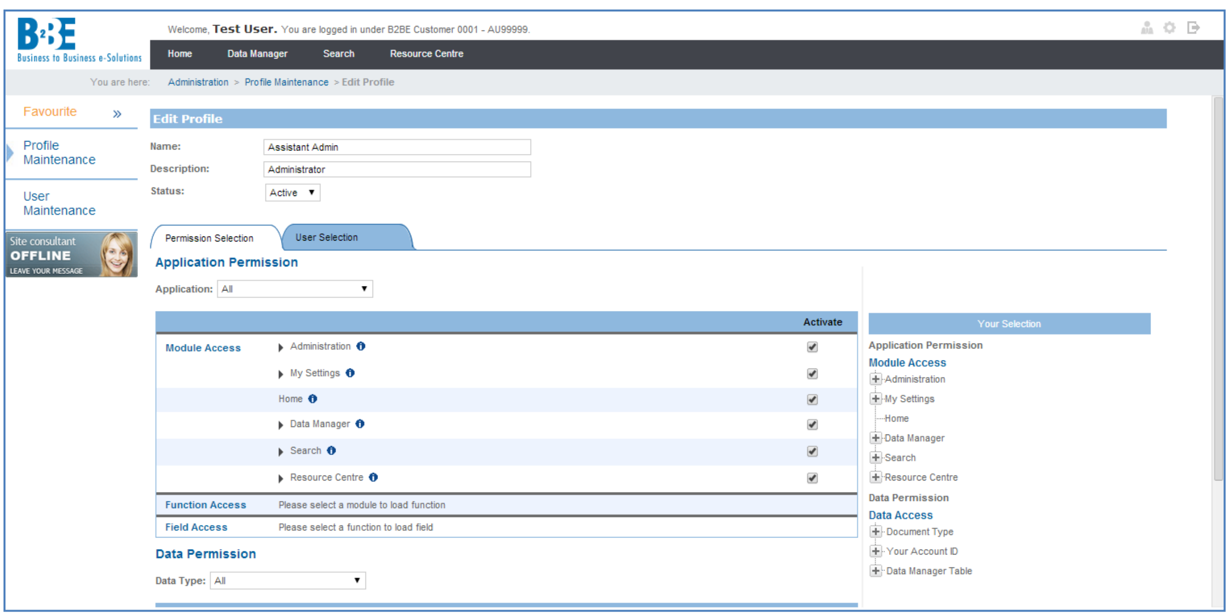
To edit a profile, click on the corresponding Edit icon of the profile to be edited.

Figure 4.2.3.1: Edit profile



The Edit Profile screen will appear which will look similar to the Add Profile screen.

Figure 4.2.3.1: Editing a profile



Once in the Edit Profile screen, the User Administrator can modify any information of the profile. He can tick or un-tick the corresponding tickboxes of the specific module, function, field or data that need to be activated or deactivated for that specific profile.

For specific description of the fields on the Edit Profile screen, please refer to *Table 4.2.1.1 Add Profile Fields since the* Edit Profile and Add Profile screens are similar.

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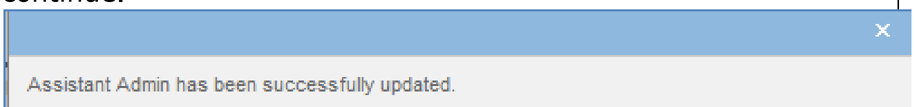
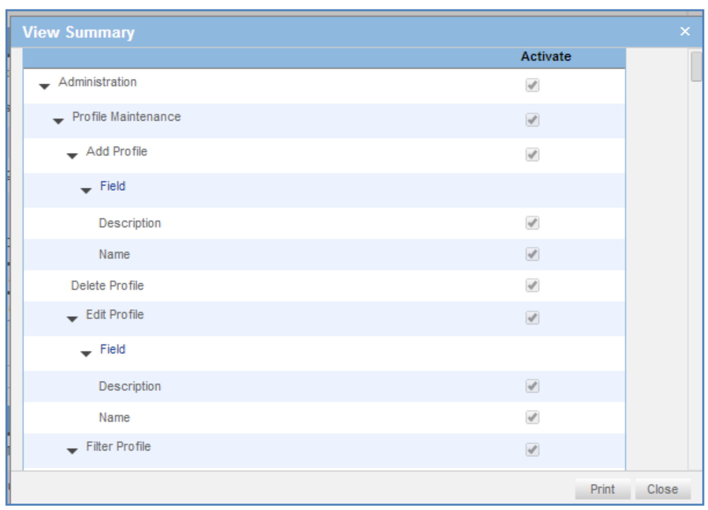
Table 4.2.1.2: Edit profile buttons

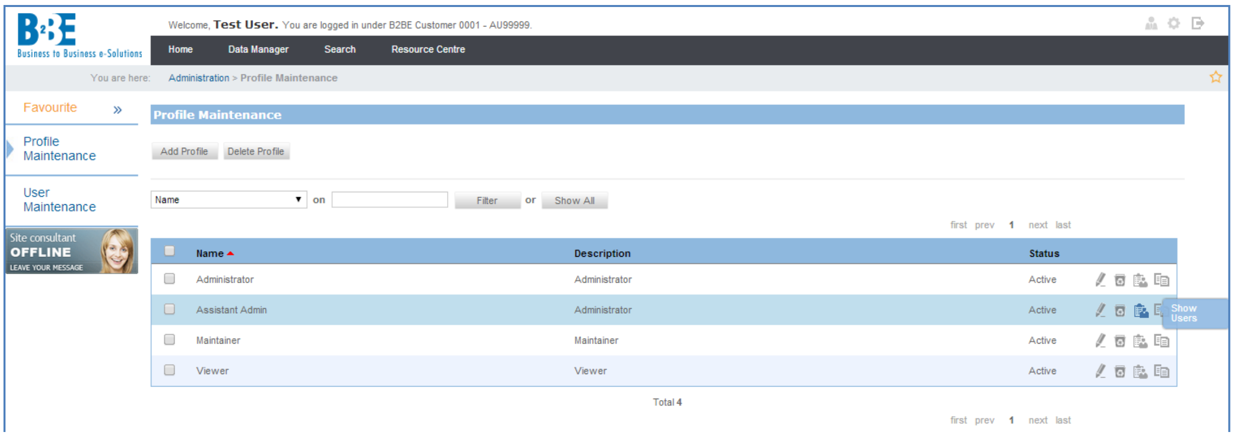
<table>
<tr><th>Buttons</th><th>Functions</th></tr>
<tr><td>Reset</td><td>Found on the bottom right of the Edit Profile screen. Click the Reset button to revert the status of the tickboxes back to the previously saved state.</td></tr>
<tr><td>Cancel</td><td>Found on the bottom right of the Edit Profile screen. Click the Cancel button to exit the Edit Profile screen without saving any profile.</td></tr>
<tr><td>Save</td><td>Found on the bottom right of the Edit Profile screen. Click the Save button to commit the changes that has been made to the profile. Once the system has successfully saved the changes to the profile, a popup will appear to confirm it. Click OK to continue.

</td></tr>
<tr><td>View Summary</td><td>Found on the bottom right of the Edit Profile screen. Click the View Summary button to see a list of all the permissions that have been selected for that profile displayed in a popup screen.


Click the Print button to print out a hardcopy of the selected permissions.
Click the Close button to close the popup screen.</td></tr>
</table>

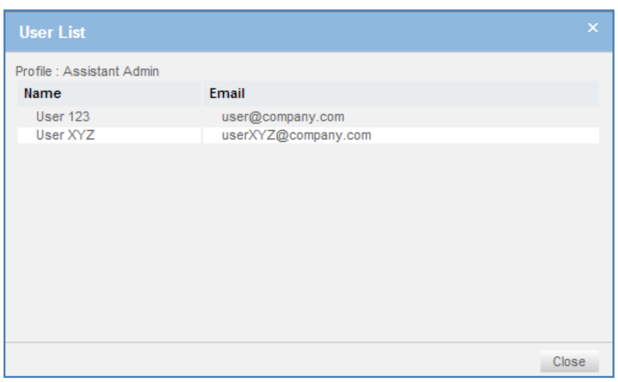
4.2.4 Show Users of a Profile

To see the list of users assigned to each of the profile, click the corresponding Show Users icon of the profile whose users you want to be shown on the Profile Maintenance sub-module.

Figure 4.2.4.1: Show users of a profile



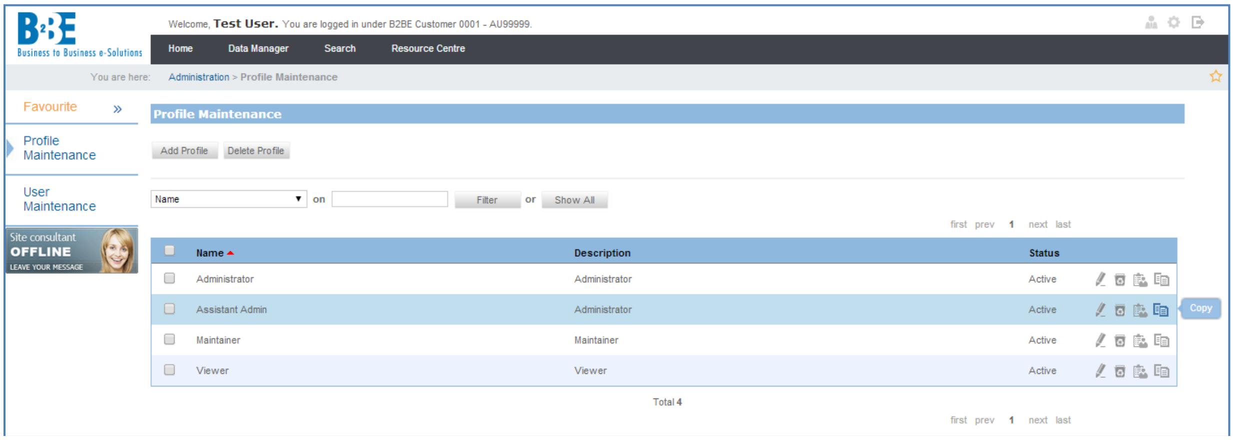
A popup showing the list of user accounts that have been assigned with that specific profile will appear listing their Name and Email Address. Click the Close button of the popup when done.



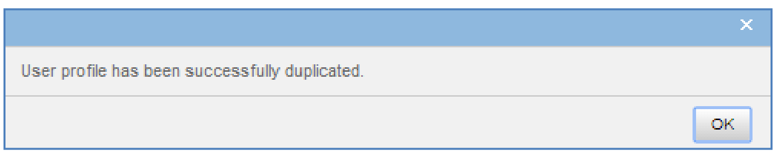
4.2.5 Copy a Profile

To copy the access permissions of a profile, click the corresponding Copy icon of the profile that is to be copied/duplicated on the Profile Maintenance sub-module.

Figure 4.2.5.1: Copy a Profile

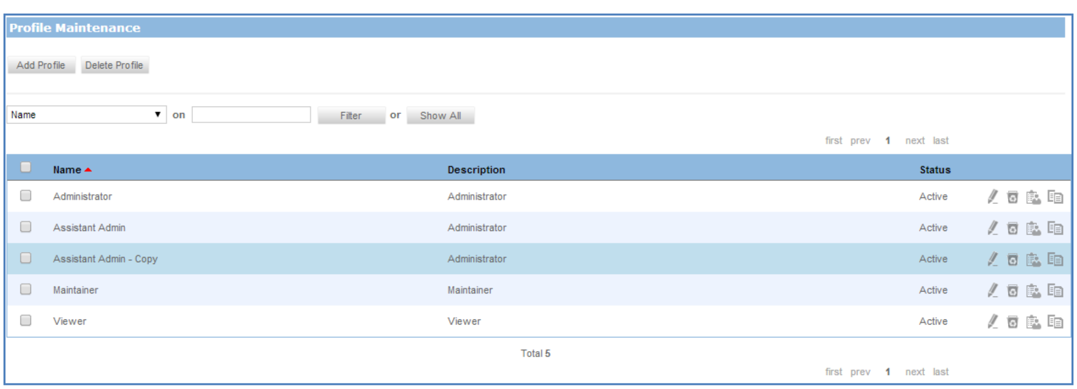


Once the Copy icon is clicked, the system will duplicate the access permissions of that specific profile and create a copy. A popup will appear to confirm its creation.



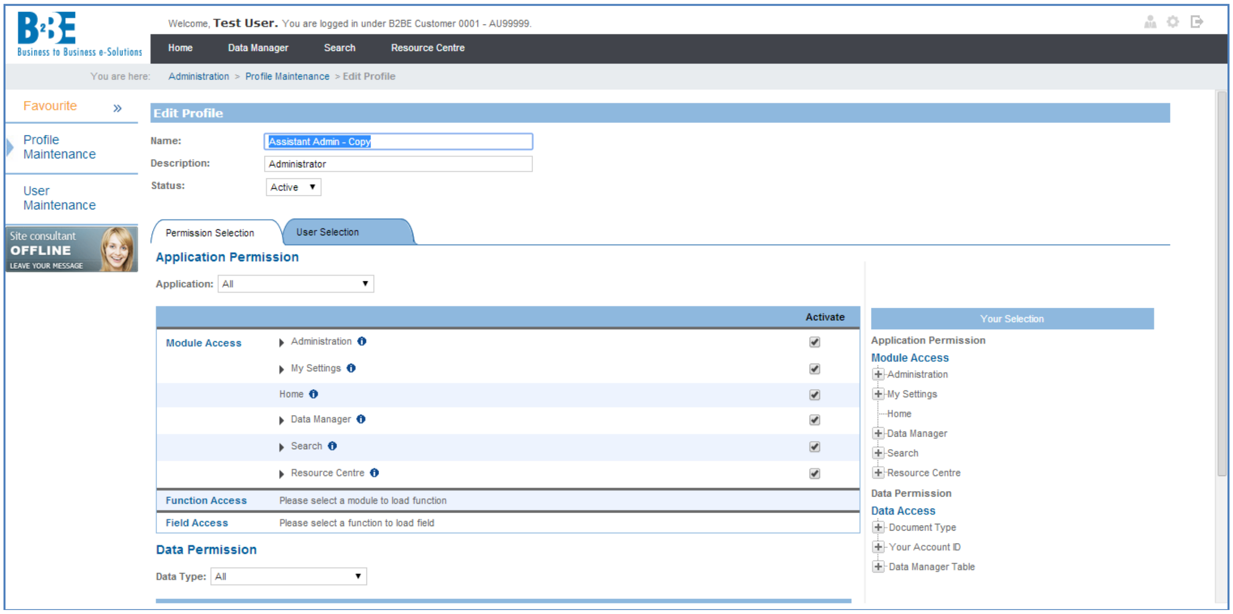
The newly created duplicate profile will appear on the list of profiles with the name of the original profile that it was copied from with the additional "- Copy" added to the end of the profile's Name. For example, if the profile "Maintainer" is copied, then the duplicate will have the name "Maintainer – Copy". Then if "Maintainer" is copied again for the second time, the name of the second duplicate will be "Maintainer – Copy (2)", so on and so forth.

Figure 4.2.5.2: Duplicate profile names

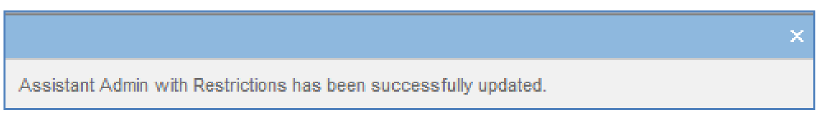


Once a profile has been duplicated, it can be renamed to replace the "- Copy" profile name by editing it. Just click on the Edit icon of the profile to edit the profile.

Figure 4.2.5.3: Edit duplicate profile



Then edit the name of the profile (i.e. from "Maintainer – Copy" to "Integrator") and the permissions accordingly then click the Save button at the bottom of the Edit Profile page. A popup will appear to confirm the successful update of the profile.



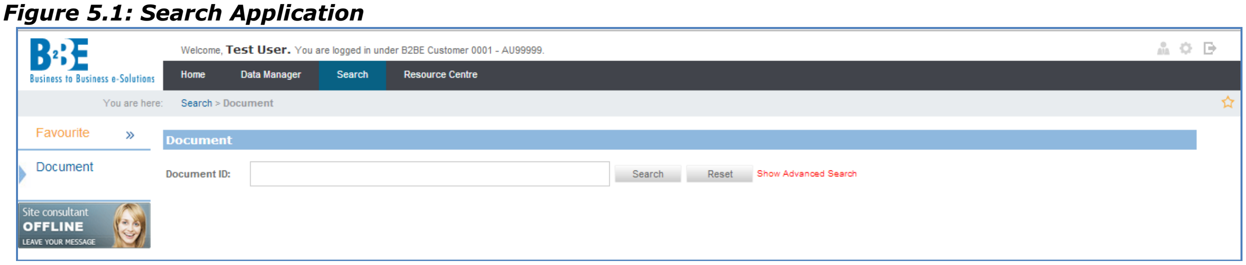
The duplicate profile that has just been renamed will then be reflected on the Profile Maintenance page.

5 Search

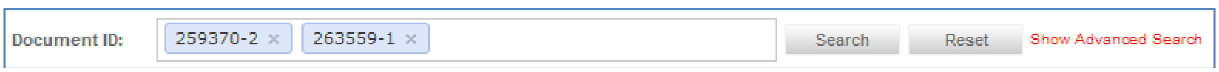
The Search application is where business documents within the past 3 months (longer if subscribed to extended archiving) can be searched and retrieved.

To get to the Search application, click on “Search” on the Applications Menu from any page in the Customer Centre.

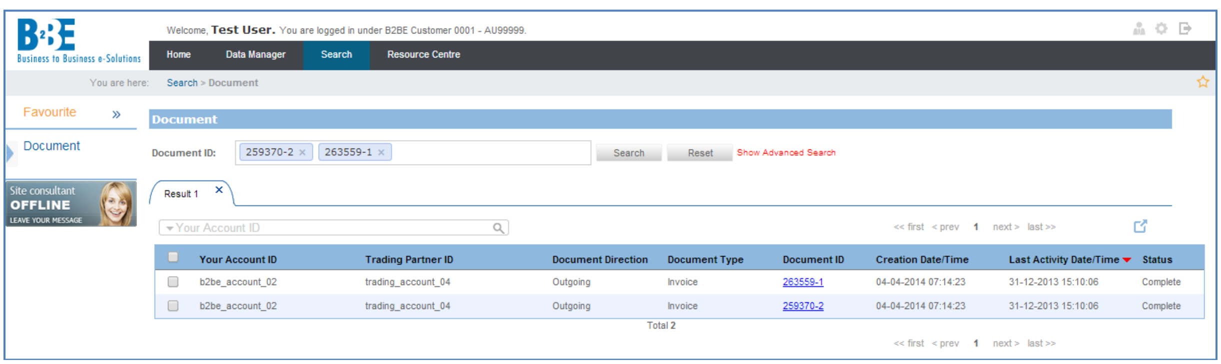
Figure 5.1: Search Application



Once in the Search application, just type in the Document ID and click the Search button beside it to retrieve that specific document. You can type in a single or multiple Document ID to be searched at the same time.



Search results will be displayed at the bottom part of the screen.



5.1 Advanced Search

For more Search options, click on the Show Advaced Search link to display the rest of the advanced Search options.

Figure 5.1.1: Advanced search

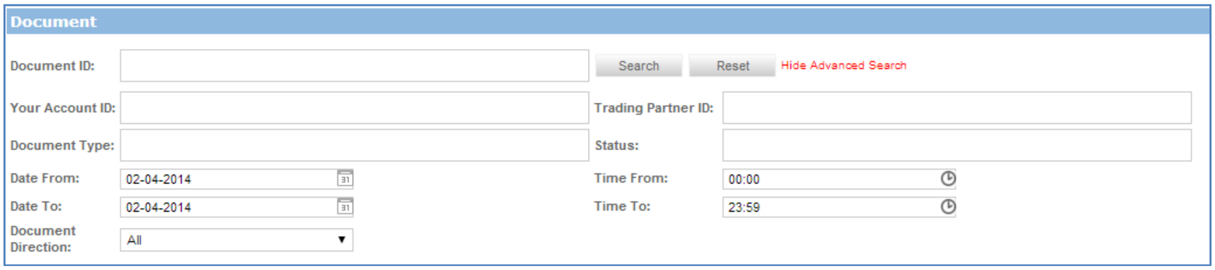
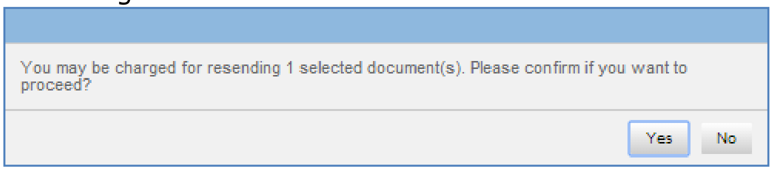


Table 5.1.1: Advanced search fields

Field Name	Description
Document ID	Document ID: 6520000240 × 6520000238 × Search Reset Show Advanced Search Unique ID for the Document. Key in a Document ID to search for then click the Search button. To search for multiple Document IDs at a time, key in the first ID and hit the Enter key and then key in another ID and hit the Enter key, and so on. To remove a Document ID from the list to be searched for, click on the corresponding X. Then click the Search button to start the search.
Your Account ID	The specific B2BE Account ID to be searched for.
Trading Partner ID	The name of the trading partner related to the document to be searched for.
Document Type	The type of document to be searched for. i.e. Purchase Orders, Invoice, Dispatch Advice, etc.
Status	The status of the document to be searched for. Options for Status are: Processing Discarded Completed Errored Redirected Deleted
Date From	The starting date of the date range to be searched for.
Date To	The ending date of the date range to be searched for.
Time From	The starting time of the time range to be searched for.
Time To	The ending time of the time range to be searched for.
Document Direction	The direction of the document to be searched for. Whether incoming, outgoing or both.

Table 5.1.2: Search application buttons

Buttons	Functions
Search	Click the Search button to start the document search based on the search criteria that was keyed in.
Reset	Click the Reset button to reset all the search criteria that was keyed in.
Resend Selected	Shown at the bottom of the Search Results section. Select one or

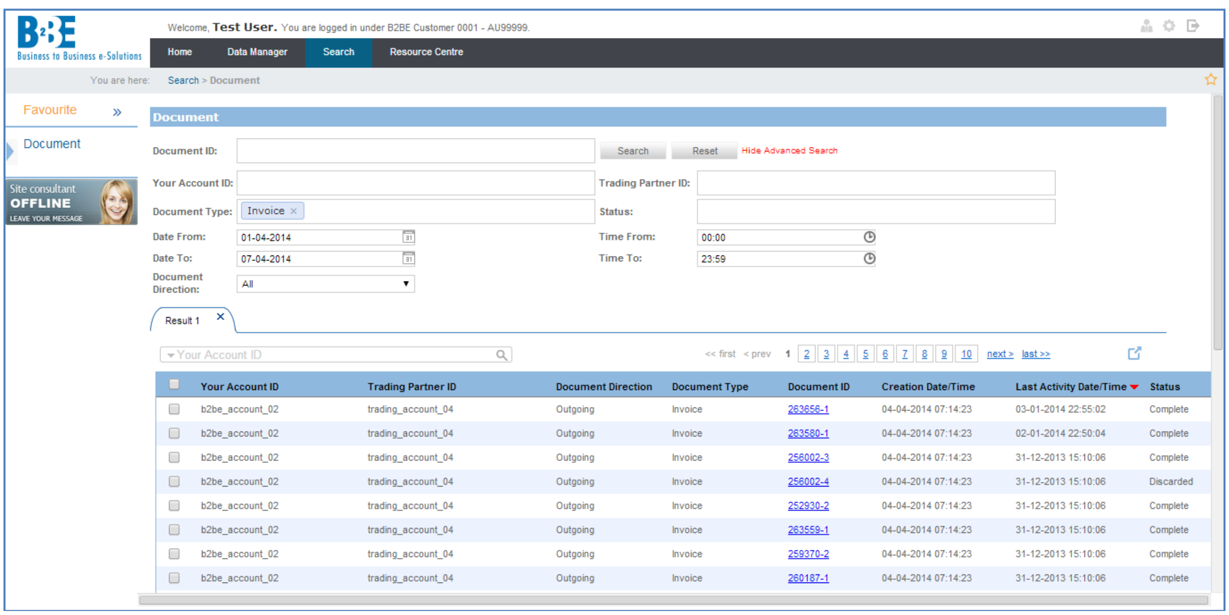
	more documents from the Search Results then click the Resend Selected button to resend the selected files either to your trading partners or to yourself from your trading partner depending on the document direction. Once the Resend Selected button is clicked, a popup message will appear to advice that there may be corresponding charges for resending the chosen documents.  Click Yes to proceed with the resend. Click No to cancel the resend.

5.2 Document Details

The Document Details contains the Document Trace which shows the processes that the document has gone through and any related documents.

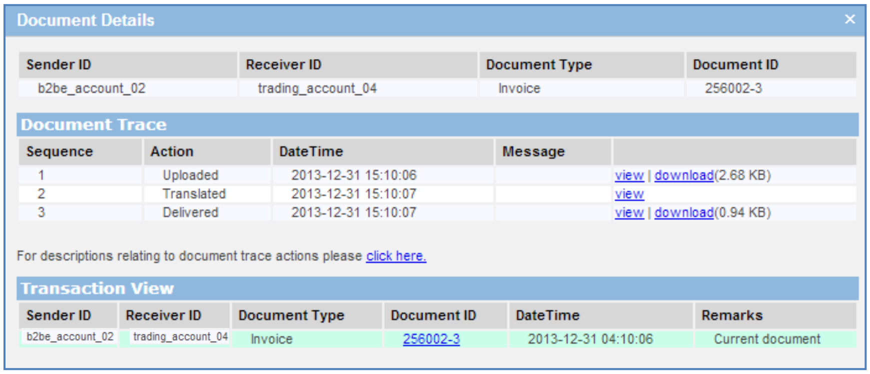
After keying in all the search criteria and clicking on the Search button to retrieve the documents. Search results are displayed at the bottom part of the screen.

Figure 5.2.1: Search result



Click on a specific Document ID link to see the Document Details for that document.

Figure 5.2.2: Document trace



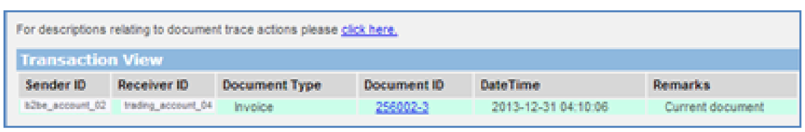
Click the corresponding View link to see the document at that specific stage of the process.

Click the corresponding Download link to download the document at that specific stage of the process to your local drive.

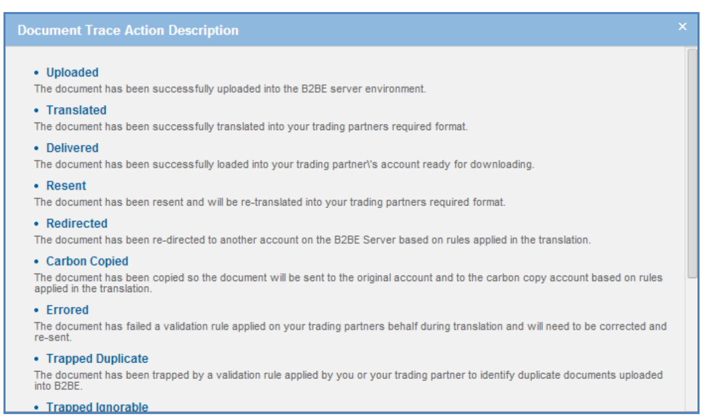
The Transaction View shows all the documents related to that specific Document ID if there is any.

Click the corresponding Document ID link to see the related document.

To see the list and description of the stages in the Document Trace, click the "click here" link.



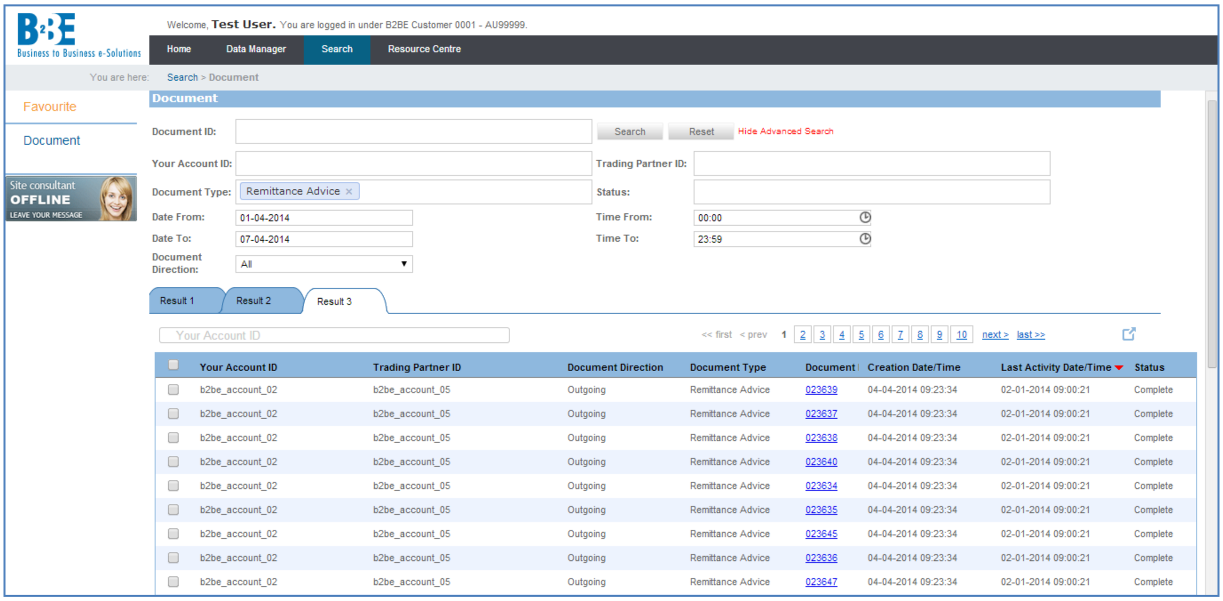
The system will then show the list in a popup screen.



5.3 Multiple Search Results

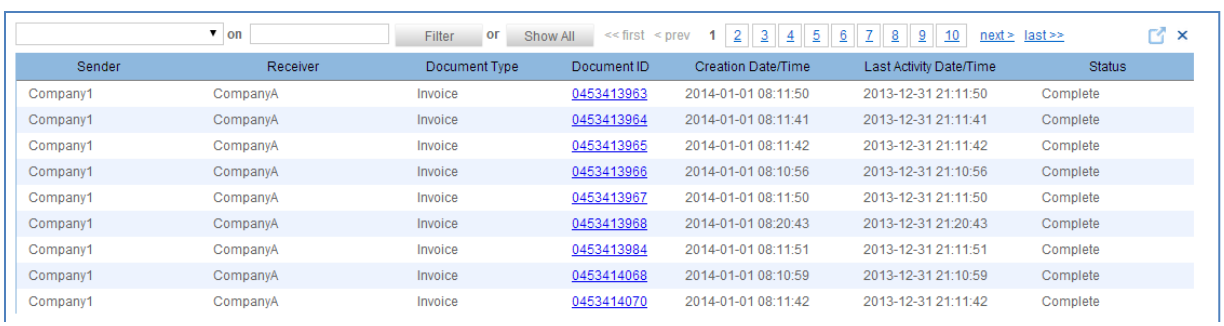
Multiple search results can be displayed right alongside each other for easy reference and comparison. After doing the first search and the search result is displayed, another search can be made by keying in new search criteria and then have the second search result displayed right alongside the first search result. Click on the corresponding Result tabs to switch from viewing one search result to the other.

Figure 5.3.1: Multiple search results



Search that has more than one page of search result will be displayed in multiple pages. Click on the specific page number to see the results on those pages. Or click on the "<<first" and "<prev" or the "next >" and "last >>" links to switch between pages.

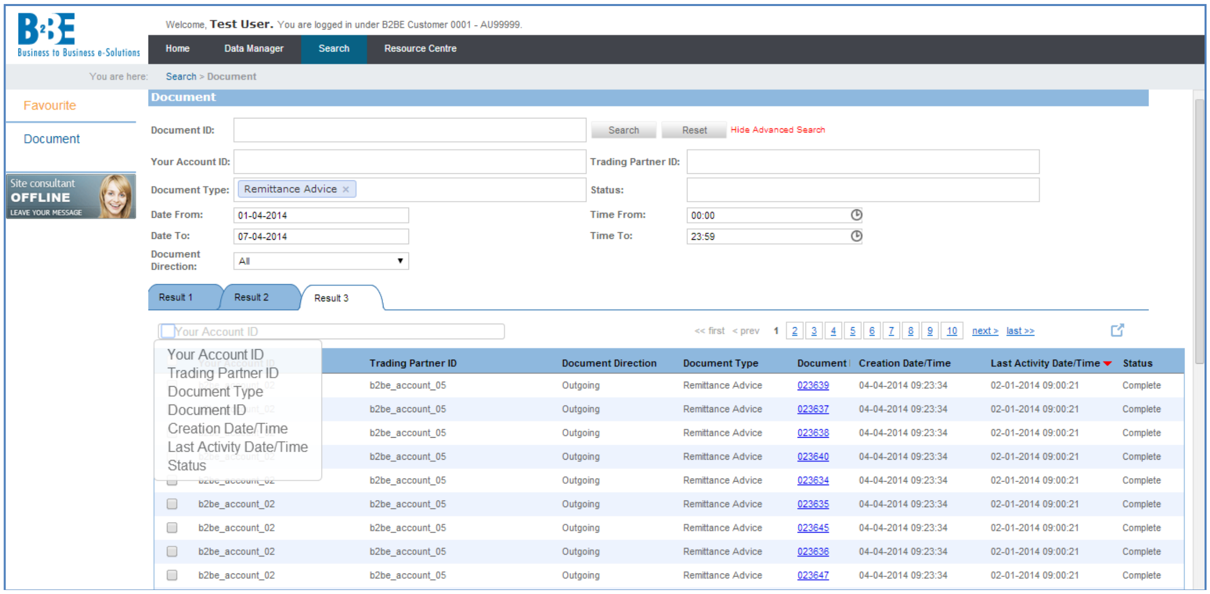
Figure 5.3.2: Multiple Pages of Search Results



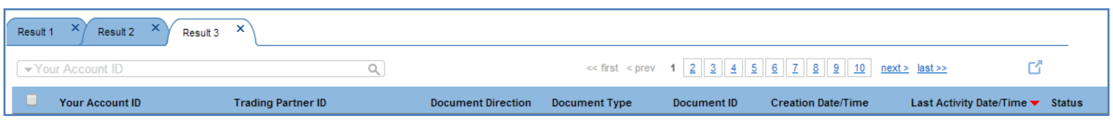
Search Results can be filtered by the following:

- Your Account ID
- Trading Partner ID
- Document Type
- Document ID
- Creation Date/Time
- Last Activity Date/Time
- Status

Figure 5.3.3: Search result filters



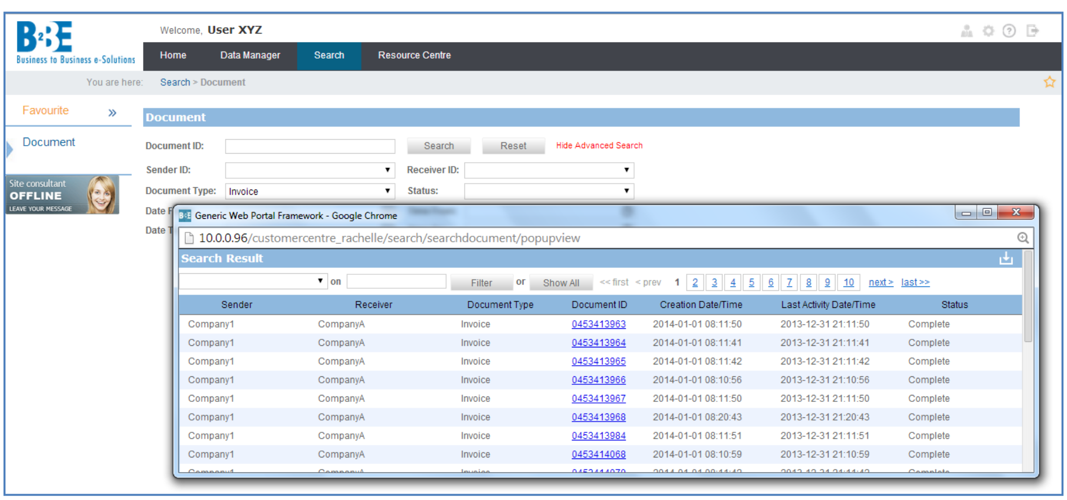
Click on the dropdown of the Search Result then select the filter criteria, type the value to be filtered then click the Filter button. The filtered result will be shown on the bottom of the page.



To display the Search Result on a separate screen for better viewing, click on the Pop Out icon.

To put the Search Result back into the main screen, click on the Pop In icon on the upper right corner of the pop out screen.

Figure 5.3.4: Pop-out and pop-in search result

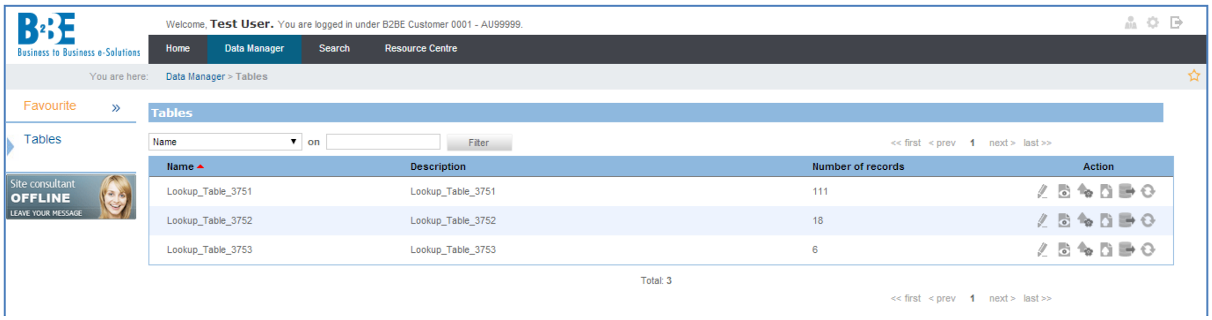


6 Data Manger

The Data Manger application is where data of lookup tables can be maintained by the users themselves if given access to it by the Administrator.

To get to the Data Manager application, click on “Data Manager” on the Applications Menu from any page in the Customer Centre Upgrade.

Figure 6.1: Data manager application



The Data Manager application contains the following functions:

- Edit Alias/Description: This function lets the user edit the alias and description of the lookup table.
- Manage Details: This function lets the user add, edit and delete data records of the lookup table.
- Manage Upload Config: This function lets the user create a new configuration for data uploading into the lookup table.
- Upload: This function lets the user upload data from a file into the lookup table.
- Export: This function lets the user export/download the data of the lookup table into a .zip file and save it to the local drive of the computer.
- Restore Table: This function lets the user restore the data of the table into a previously backed up version.

6.1 Data Manager > Edit Alias/Description

The Edit Alias/Description function lets the user edit the alias of the lookup table. Description can also be added to describe the purpose of the lookup table.

To edit, click on the Edit Alias/Description icon  of the lookup table whose alias and/or description needs to be edited.

Figure 6.1.1 Edit alias/description screen

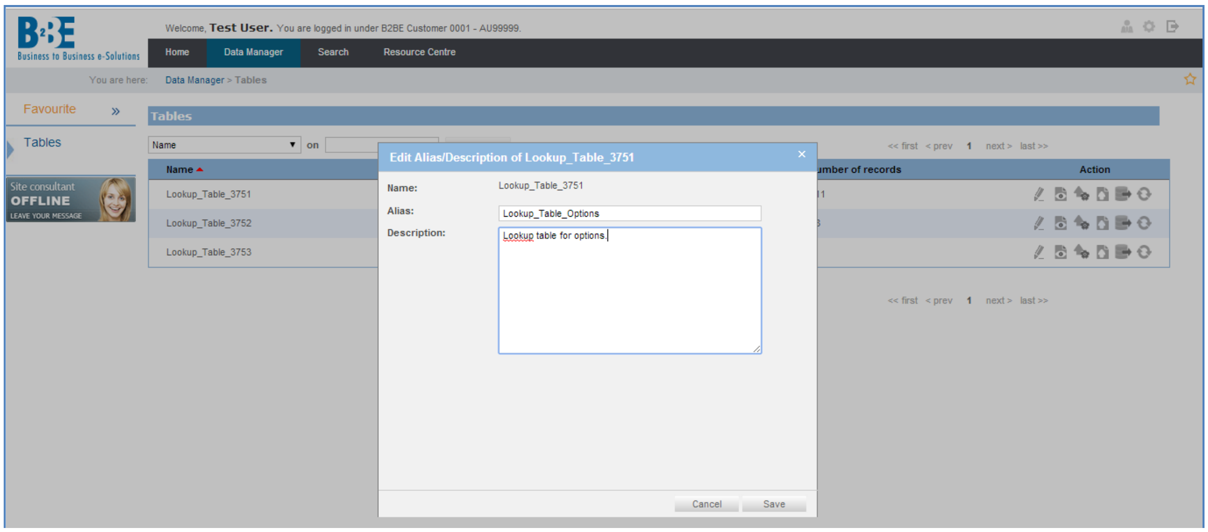
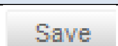
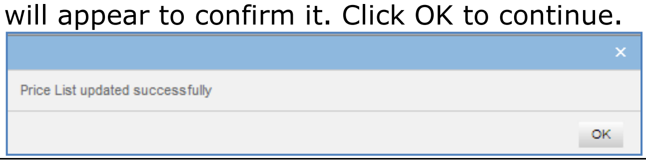
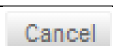


Table 6.1.1: Edit alias/description screen fields

Field Name	Description
Name	Name of the lookup table. Named by B2BE.
Alias	The name that the user can assign to the lookup table.
Description	The description to describe the purpose of the lookup table.

Table 6.1.2: Edit alias/description screen buttons

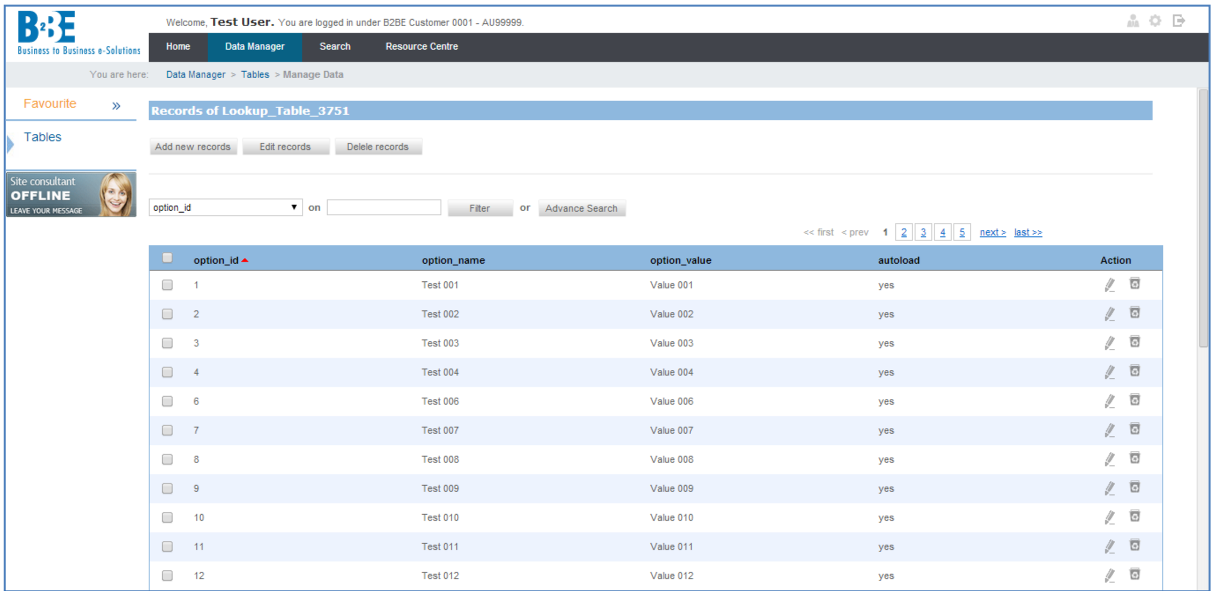
Buttons	Functions
	Found on the bottom right of the Edit Alias/Description screen. Click the Save button to commit the changes that has been made to the fields. Once the system has successfully saved the changes to the lookup table, a popup will appear to confirm it. Click OK to continue. 
	Found on the bottom right of the Edit Alias/Description screen. Click the Cancel button to exit the screen without saving any of the changes to the fields.

6.2 Data Manager > Manage Data

The Manage Data function lets the user see the data records of the lookup table. The user can also add, edit or delete data records.

To see the content of a lookup table, click on the corresponding Manage Data icon of the lookup table to be viewed.

Figure 6.2.1: Manage data screen

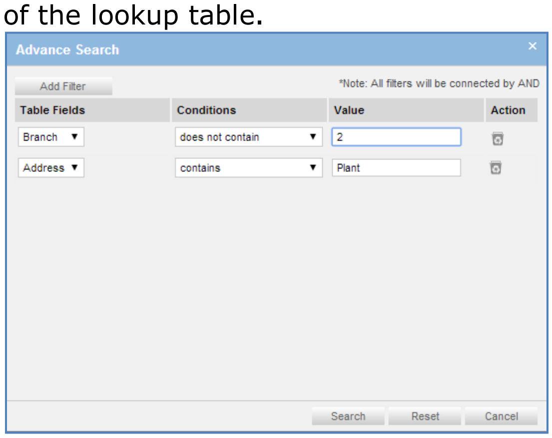


The content of the Manage Details screen will vary depending on the structure of the lookup table.

Table 6.2.1: Manage data screen buttons

Buttons	Functions
Add new records	Found on the top left of the Manage Data screen. Click the Add New Records button to go to the Add New Records screen to create a new data record for the lookup table. Please refer to section 6.2.1 Add New Records.
Edit records	Found on the top left of the Manage Data screen. There are 2 ways to edit the data records of a lookup table. Option 1 : Click the Edit icon of the corresponding record to be edited. Option 2 : Tick the tickbox of the record(s) to be edited then click the Edit Records button. The user can choose multiple records to edit all at once. Please refer to section 6.2.2 Edit Records.
Delele records	Found on the top left of the Manage Data screen. Click the Delete Records button to remove the data record from the lookup table. There are 2 ways to delete the data records of a lookup table. Option 1 : Click the Delete icon of the corresponding

<table>
<tr><td></td><td>record to be removed.
Option 2 : Tick the tickbox of the record(s) to be deleted then click the Delete Records button. The user can choose multiple records to delete all at once. Please refer to section 6.2.3 Delete Records.</td></tr>
<tr><td>
</td><td>Found on the Search bar above the table on the Manage Data screen. The user can select the filter from the dropdown and then type the value to be searched for in the textbox and click the Filter button to sift the data records of the lookup table.

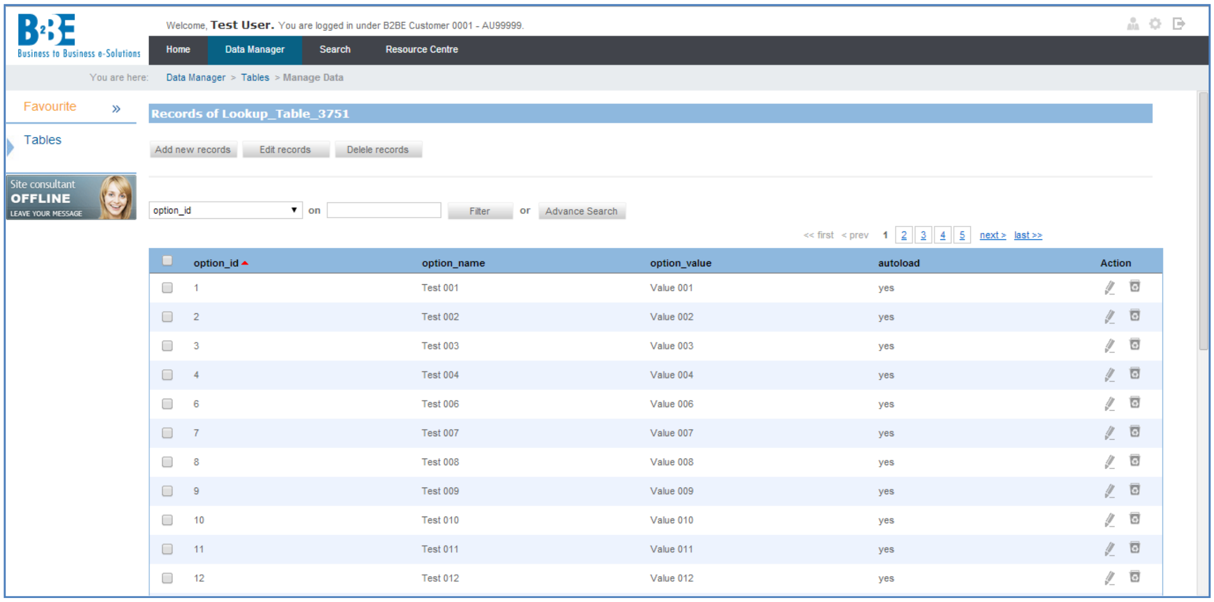
</td></tr>
<tr><td>
</td><td>Found on the Search bar above the table on the Manage Data screen. The user can click the Advance Search button to use multiple filters to sift the data records of the lookup table.
The user can select the filter from the dropdown and then type the value to be searched for in the textbox and click the Add Filter button to add another filter to sift the data records of the lookup table.


- Click the corresponding Delete icon  of the filter to delete it.
- Click the Search button to start searching the data records in the lookup table based on the filters that were set.
- Click the Reset button to clear the filters.
- Click the Cancel button to exit the Advance Search popup without doing any search.</td></tr>
</table>

6.2.1 Add New Records

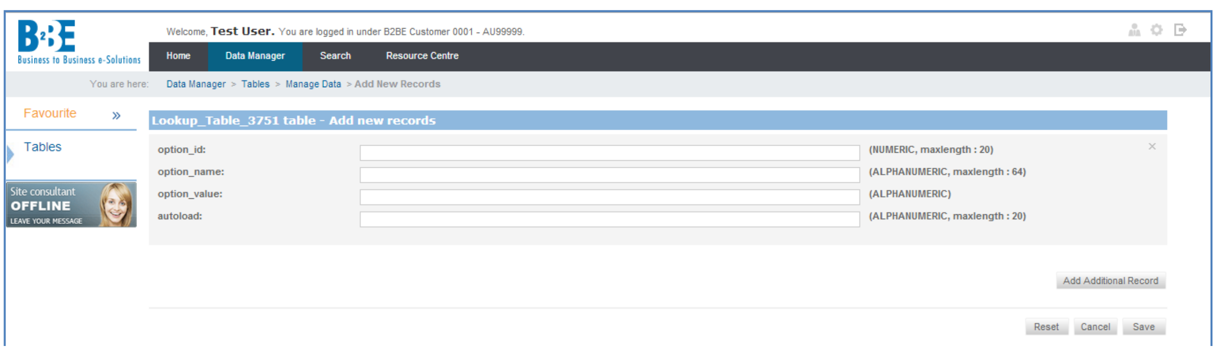
The user can click on the Add New Records button found on the top left of the Manage Data screen to add a new data record to the lookup table.

Figure 6.2.1.1: Manage data screen – add new records



The content of the Add New Record screen will vary depending on the structure of the lookup table.

Figure 6.2.1.2: Add New Record Screen



Click on the Add Additional Record button to add multiple data records into the lookup table at the same time.

Figure 6.2.1.3: Add new record screen – add additional record

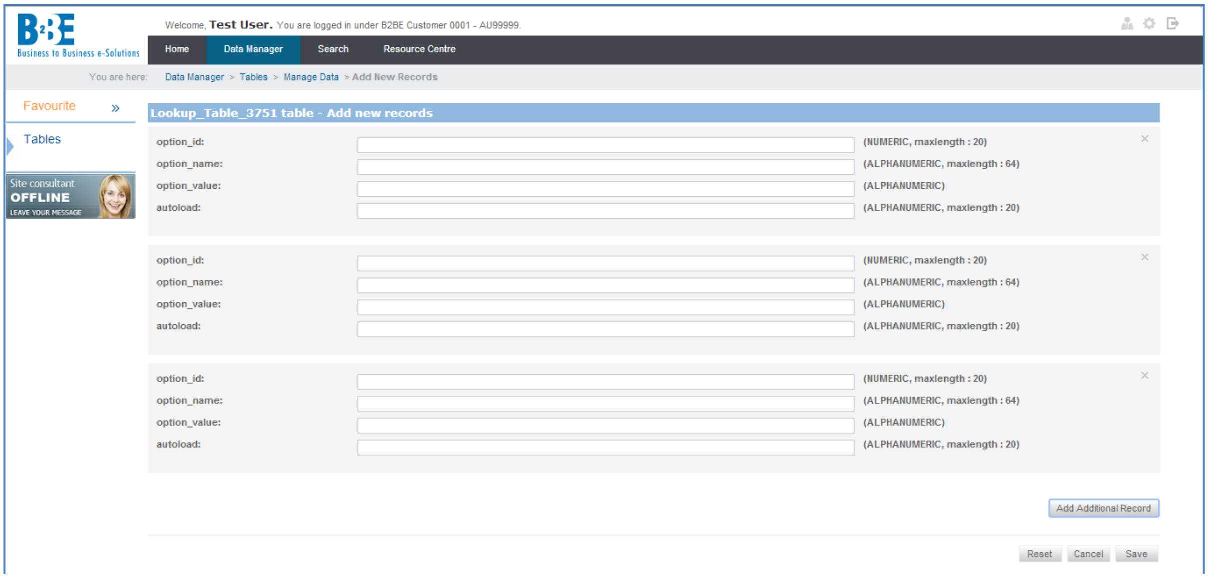
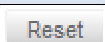
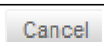
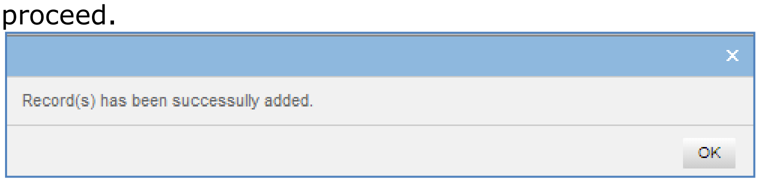


Table 6.2.1.1: Add new record screen buttons

Buttons	Functions
	Found on the bottom right corner of the Add New Record n. Click the Reset button to clear the values on the fields of Add New Records screen.
	Found on the bottom right corner of the Add New Record n. Click the Cancel button to exit the Add New Records screen without saving any data.
	Found on the bottom right corner of the Add New Record n. Click the Save button to commit the data that were keyed into the fields into the lookup table. A popup will appear to confirm the successful saving of the data records. Click OK to proceed. 

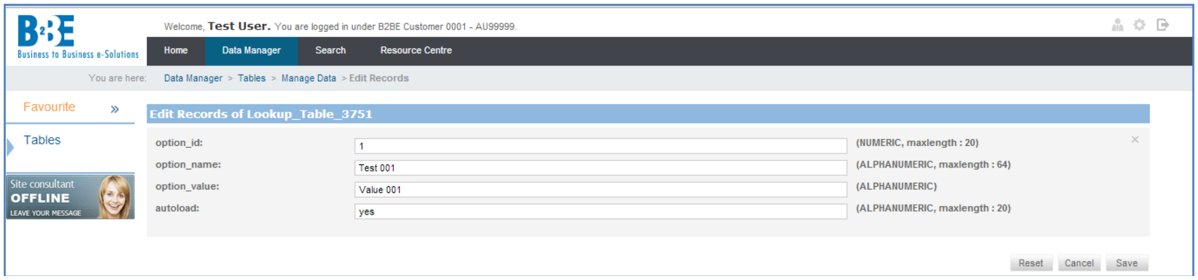
6.2.2 Edit Records

The user can click on the Edit Records button found on the top left of the Manage Data screen to add a new data record to the lookup table.

There are 2 ways to edit the data records of a lookup table.

Option 1: Click the Edit icon  of the corresponding record to be edited. The data of that record will be shown for the user to edit.

Figure 6.2.2.1: Manage data screen – edit record



Option 2: Tick the tickbox of the record(s) to be edited then click the Edit Records button. The user can choose multiple records to edit all at once.

Figure 6.2.2.1: Manage data screen – edit multiple records

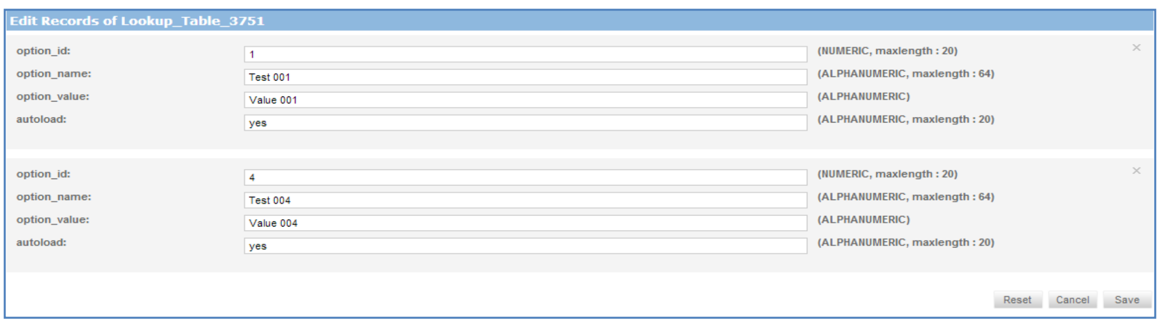
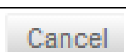
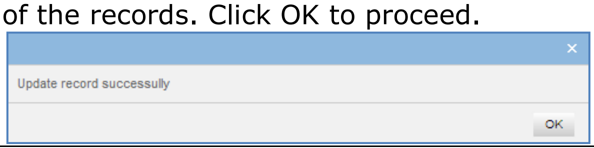


Table 6.2.2.1: Edit record screen buttons

Buttons	Functions
	Found on the bottom right corner of the Edit Record screen. Click the Reset button to clear the values on the fields of Edit Records screen.
	Found on the bottom right corner of the Edit Record screen. Click the Cancel button to exit the Edit Records screen without saving any changes to the data.
	Found on the bottom right corner of the Edit Record screen. Click the Save button to commit the changes made to the data into the lookup table. A popup will appear to confirm the successful update of the records. Click OK to proceed. 

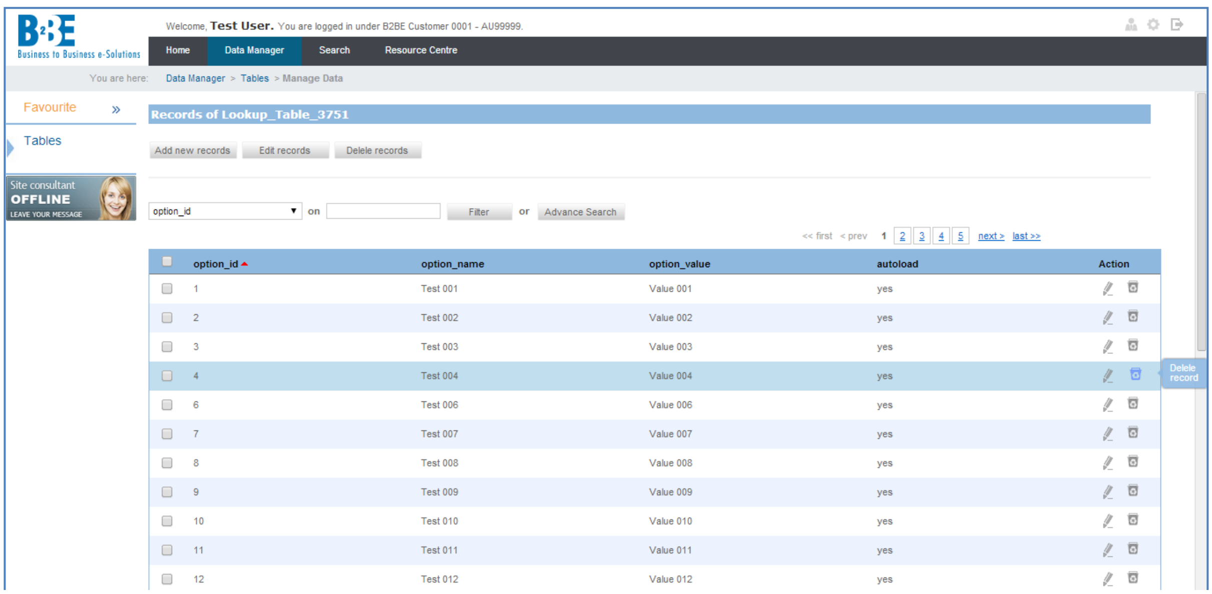
6.2.3 Delete Records

The user can click on the Delete Records button found on the top left of the Manage Data screen to remove the data record from the lookup table..

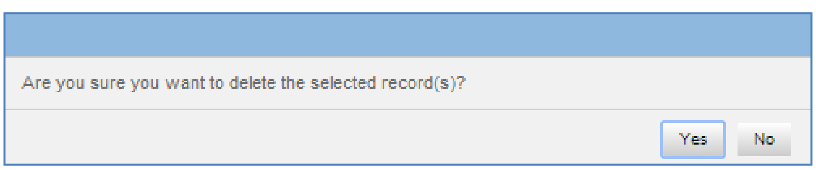
There are 2 ways to delete data records from a lookup table.

Option 1: Click the Delete icon of the corresponding record to be removed. The data of that record will be shown for the user to edit.

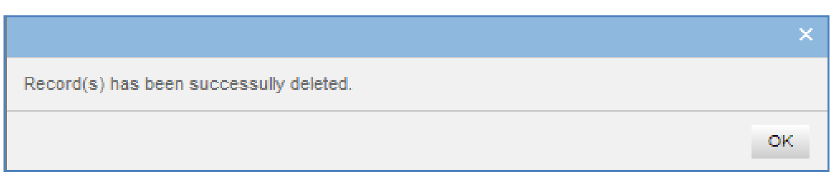
Figure 6.2.3.1: Manage data screen – delete records option 1



A popup will appear to confirm the deletion of the data from the lookup table.

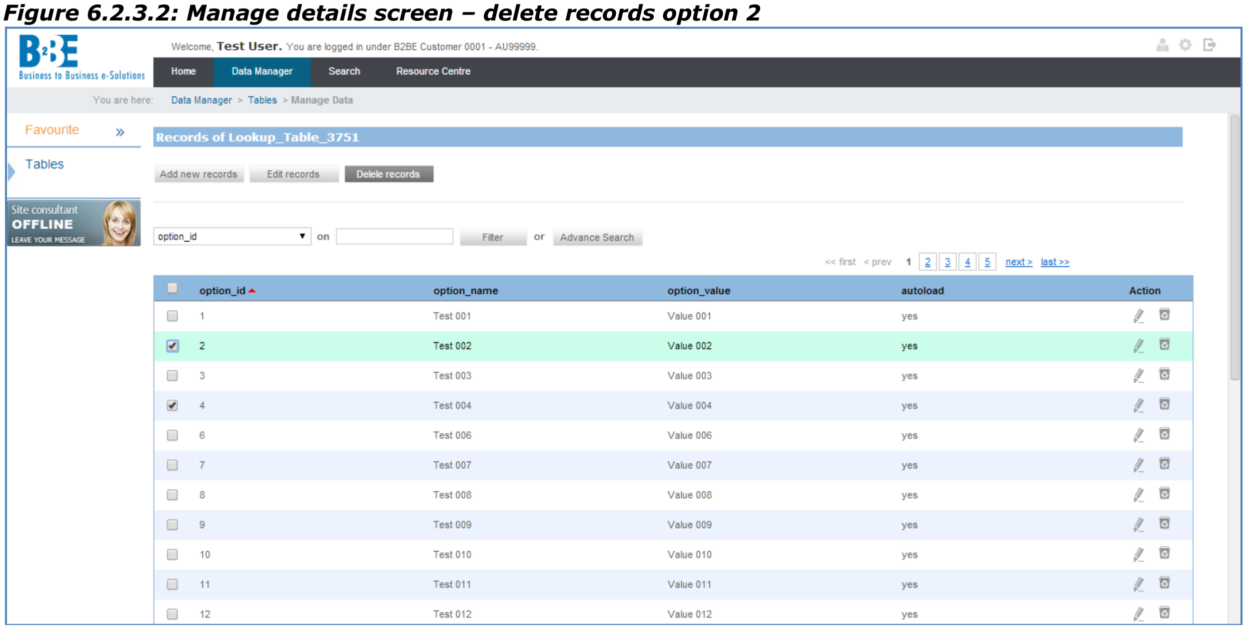


Click Yes to confirm deletion, click No to cancel deletion. If Yes is clicked, a popup will appear to confirm the successful deletion of the record from the lookup table. Click OK to proceed.

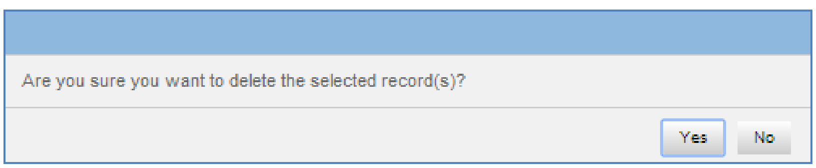


Option 2: Tick the tickbox of the record(s) to be deleted then click the Delete Records button.

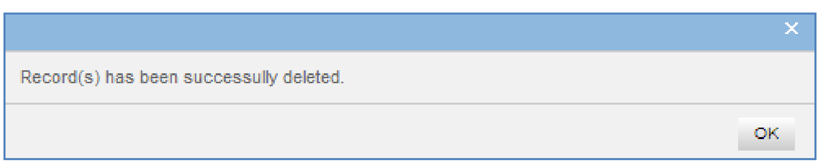
Figure 6.2.3.2: Manage details screen – delete records option 2



A popup will appear to confirm the deletion of the multiple records from the lookup table.



Click Yes to confirm deletion, click No to cancel deletion. If Yes is clicked, a popup will appear to confirm the successful deletion of the records from the lookup table. Click OK to proceed.



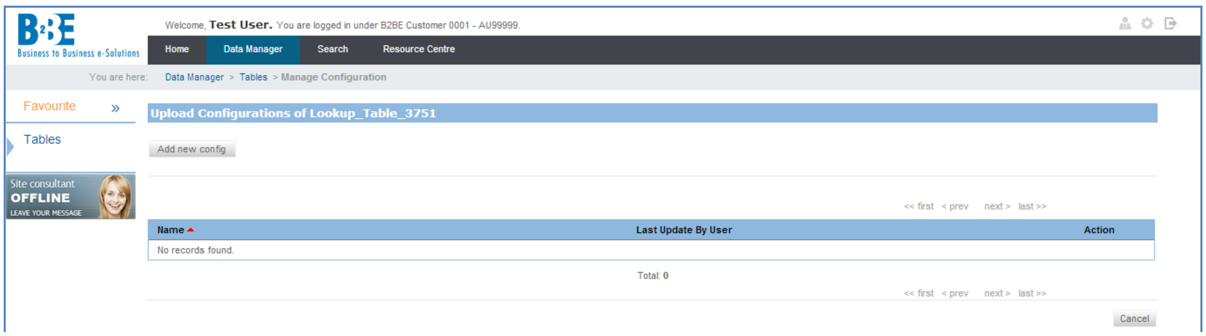
6.3 Data Manager > Manage Upload Config

This function lets the user create a new configuration for data uploading or importing of data from a file into the lookup table.

To create, view or modify a new data upload configuration, click on the corresponding Manage Upload Config icon of the lookup table.

Since no upload configuration has been set up yet initially, the screen will show "No records found."

Figure 6.3.1: Manage upload config screen



Click the Add new config button to create a new configuration for data uploading. This will take you to the Add New Config screen.

Figure 6.3.2: Add new config screen

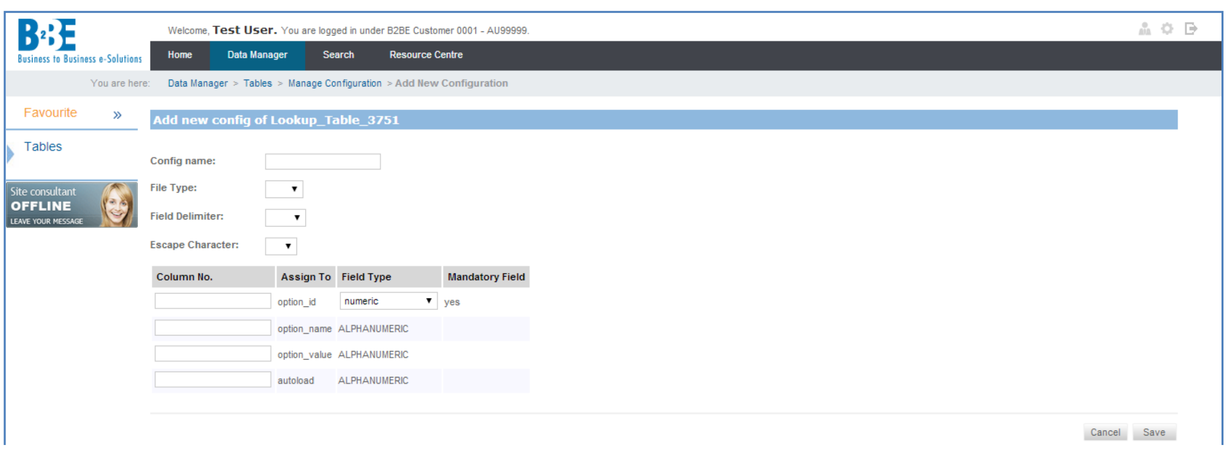


Table 6.3.1: Add new config screen fields

Field Name	Description
Config Name	Name for the new upload configuration.
File Type	Choose from the dropdown options of accepted file types. Either .txt or .csv file formats.
Field Delimiter	Choose from the dropdown options of accepted field delimiters. Options are: (|) pipe, (,) comma, TAB, (*) asterisk and (+) plus.
Escape Character	Choose from the dropdown options of accepted escape

Field Name	Description
	characters.
Mandatory Record Fields	Column No. – column sequence number on the file to be uploaded. Assign To – name of the column. Field Type – either Text, Numeric (no decimal, 2 decimals or 3 decimals). Mandatory Field – either Yes or No. The content of this table will vary depending on the structure of the lookup table.

Figure 6.3.2: Add new config screen – sample

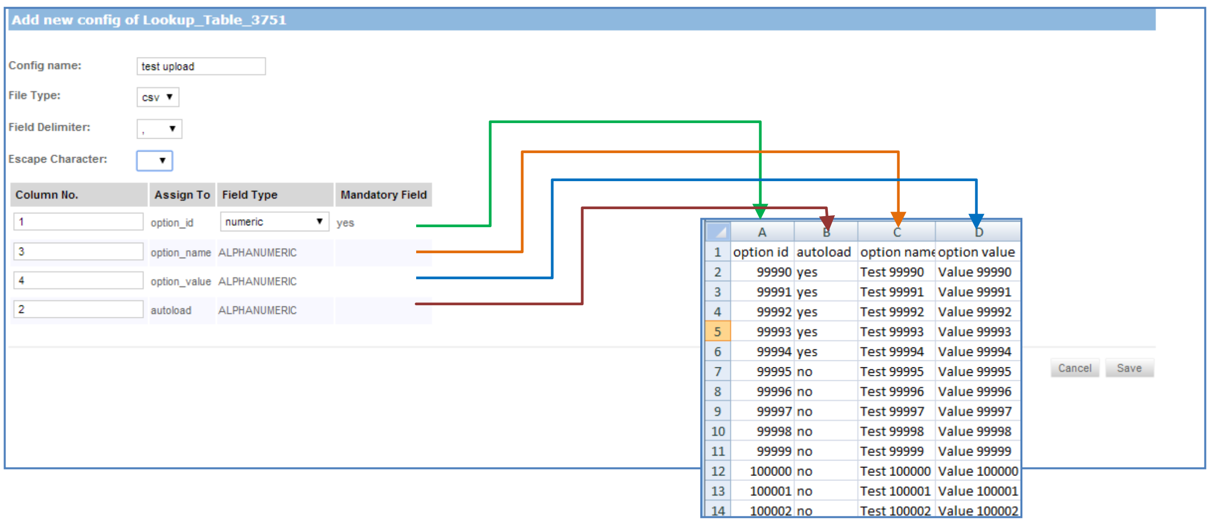


Table 6.3.1: Add new config screen buttons

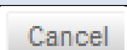
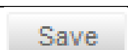
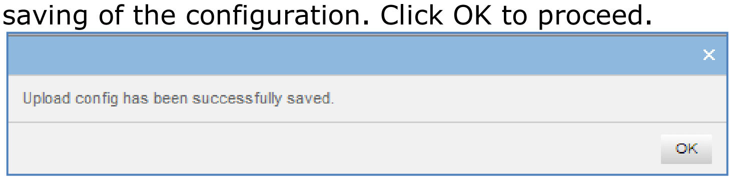
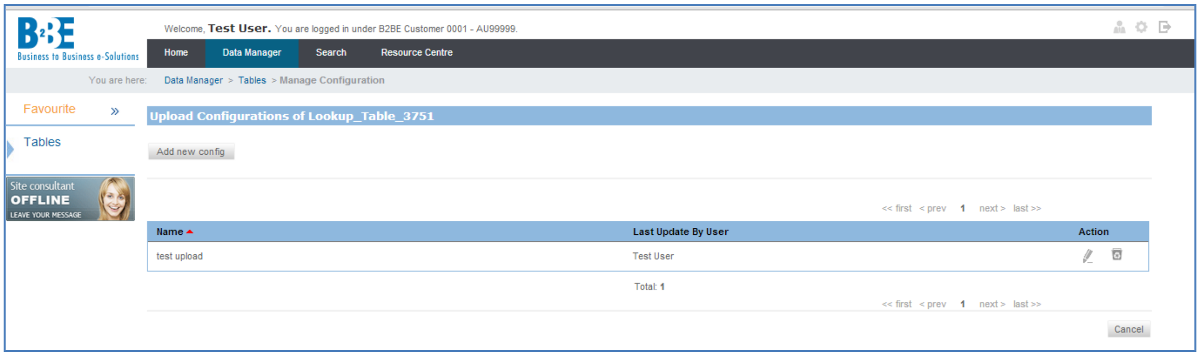
Buttons	Functions
	Found on the bottom right corner of the Add New Config screen. Click the Cancel button to exit the Add New Config screen without saving any data.
	Found on the bottom right corner of the Add New Config screen. Click the Save button to create the new data upload configuration. A popup will appear to confirm the successful saving of the configuration. Click OK to proceed. 

Figure 6.3.3: Edit and Delete Config



To edit a configuration, click the Edit icon of the corresponding configuration to be edited. The details of that configuration will be shown for the user to edit.

To delete a configuration, click the Delete icon of the corresponding record to be removed.

6.4 Data Manager > Import Data

The Import Data function lets the user upload data from a file into the lookup table.

To edit, click on the corresponding Upload icon of the lookup table that data needs to be uploaded to.

Figure 6.4.1: Import data screen

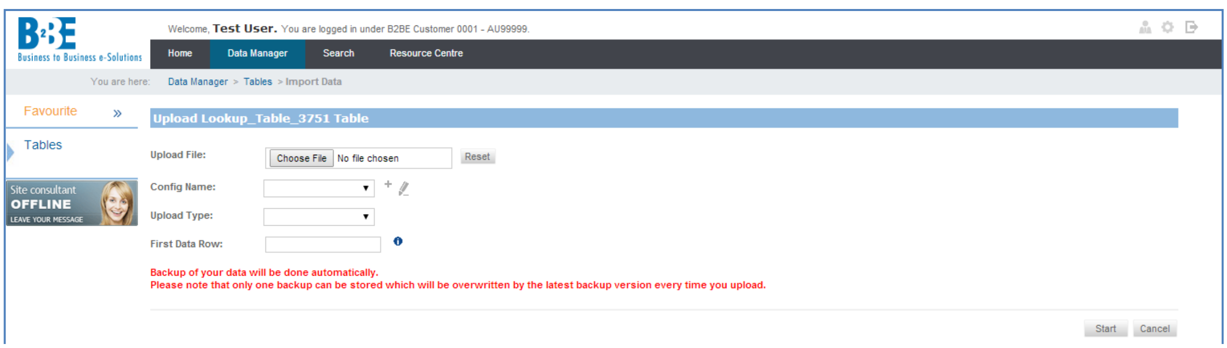


Table 6.4.1: Import data screen fields

Field Name	Description
Upload File	Click on Choose File button to select the file to be uploaded to the lookup table from the local drives. Click on Remove to remove the chosen file.
Config Name	Name of the configuration for the upload of the file. Choose from the dropdown which lists all the upload configurations created in section 6.3 Manage Upload Config. If no upload config has been created yet, just click on the + icon to create one on the Add New Config popup.

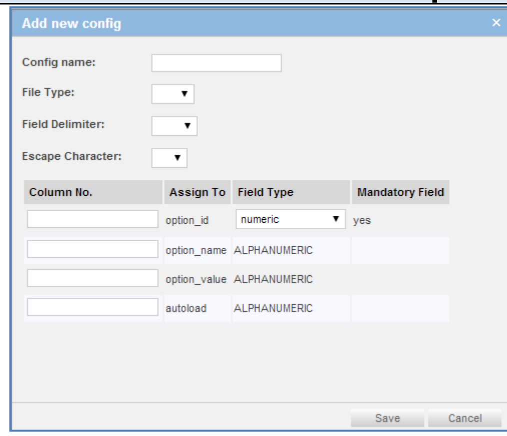
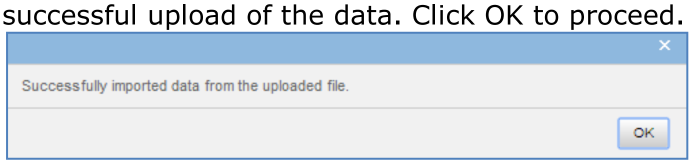
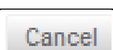
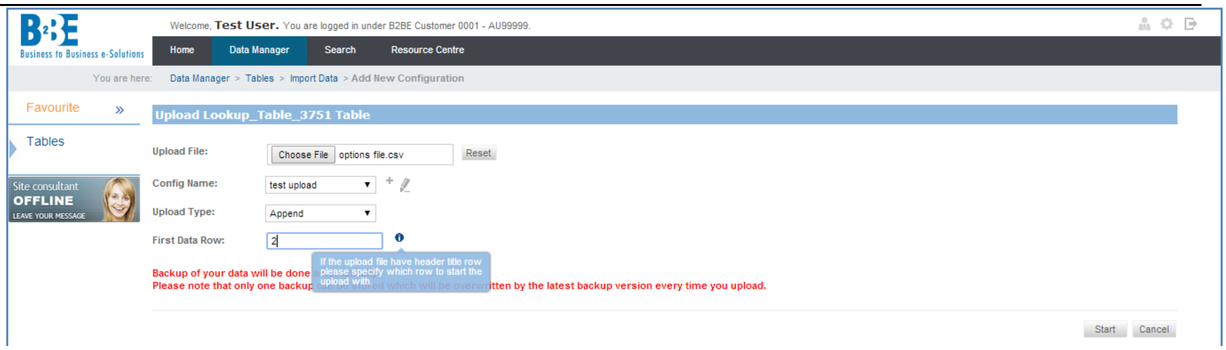
Field Name	Description
	 If the existing upload config needs to be edited, click on the Edit icon to do so.
Upload Type	Choose Append from the dropdown to add data from the file to be uploaded to the existing data in the lookup table. Choose Replace to overwrite existing data in the lookup table with the ones in the file to be uploaded.
First Data Row	Row number of the first row of data to be uploaded. This is to make sure that no header row from the upload file will be included during import.
File Type	The system detects the file type once an upload config has been chosen in the Config Name field.

Table 6.4.2: Import Data Screen Buttons

Buttons	Functions
	Found on the bottom right corner of the Import Data screen. Click the Start button to upload the chosen file and import the data into the lookup table. A popup will appear to confirm the successful upload of the data. Click OK to proceed. 
	Found on the bottom right corner of the Import Data screen. Click the Cancel button to exit the Upload Data screen without uploading any data.

When the Start button is clicked, the system will automatically backup the current existing data. But only one (1) copy of backup can be saved. So that means you can only restore data from backup that is most recent. Refer to the note in red font on the Import Data page.

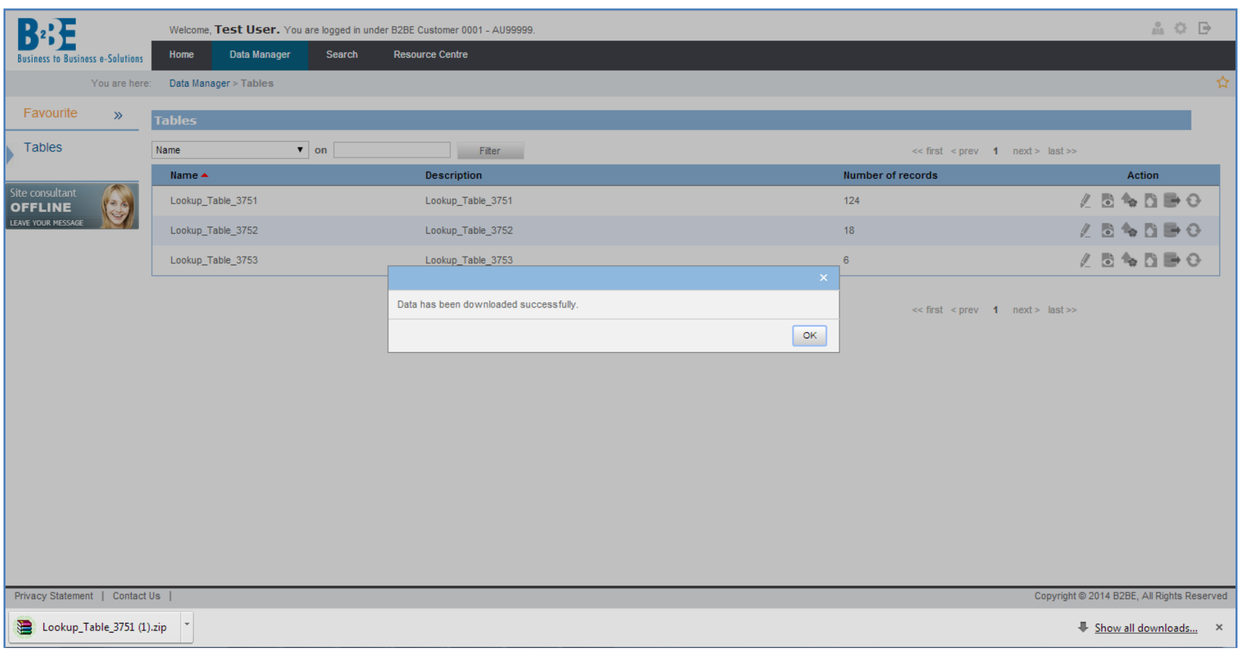


6.5 Data Manager > Export Data

The Export Data function lets the user export/download the data of the lookup table and save it to the local drive of the computer.

To download the data from a lookup table, click the corresponding Export Data icon of the lookup table from which data is to be exported. The system will then extract the data from that lookup table, save it into a .zip file and download it to the local machine. A popup will appear to confirm the successful download of the data from the lookup table.

Figure 6.5.1: Export data



6.6 Data Manager > Restore Data

The Restore Data function lets the user restore previously backed up data that was stored during the last Upload Data activity back into the lookup table again. The system can only store one backup data per lookup table.

To restore the backup data into a lookup table, click on the corresponding Restore Data icon of the lookup table that is to be restored.

Figure 6.6.1: Restore data screen

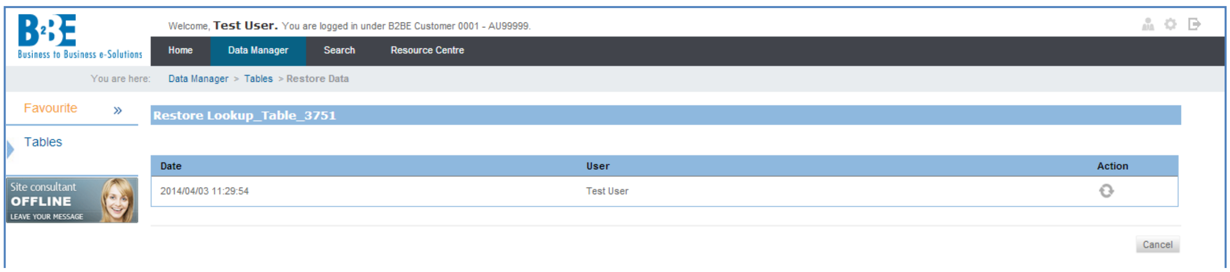
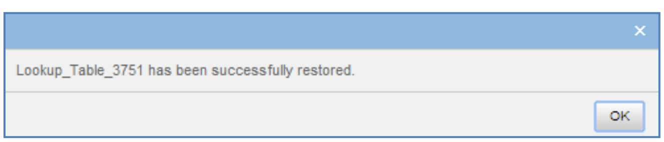


Table 6.6.1: Restore data screen fields

Field Name	Description
Date/Time	The date and time stamp of the backup data.
User	Name of the user who created the backup data.

To start restoring the backup data into the lookup table, click on the Restore Data icon. A popup will appear to confirm the successful restoration of the backup data into the lookup table.



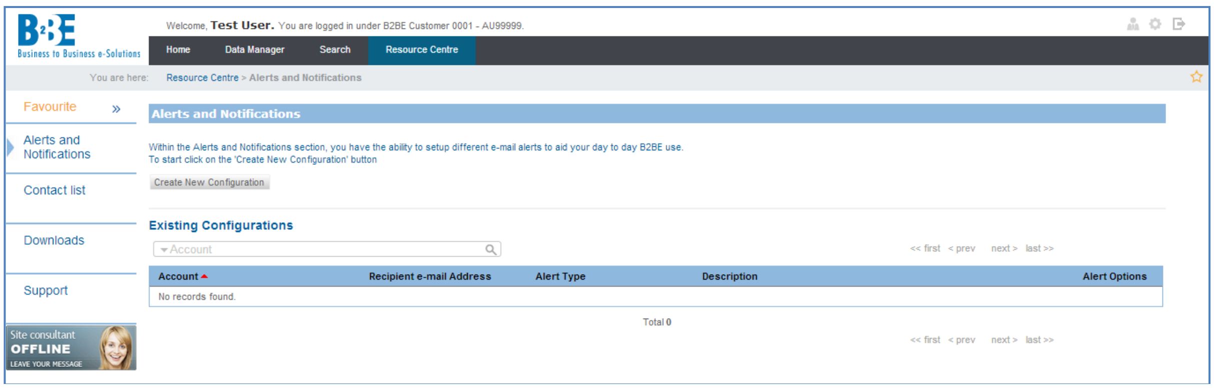
7 Resource Centre

The Resource Centre application contains the following functions:

- Alerts and Notifications: This function lets the user configure alerts and notification that the system will send/create.
- Contact List: This function shows all the contact information of all B2BE global offices.
- Downloads: This function is where all available software and documentations are stored that users can download as needed.
- Support: This function is where users can raise queries so that the B2BE support team can provide assistance to all reported issues.

To get to the Resource Centre application, click on "Resource Centre" on the Applications Menu from any page in the Customer Centre Upgrade.

Figure 7.1: Resource centre application

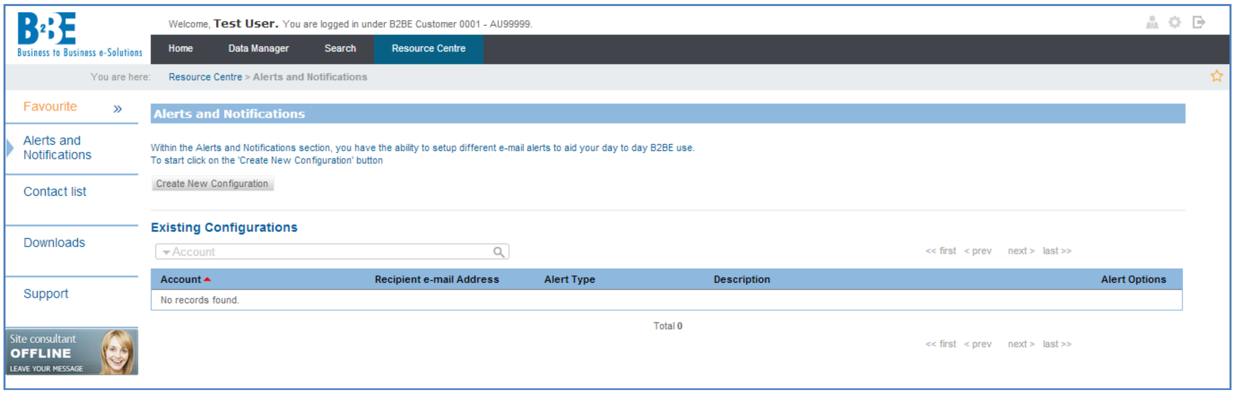


7.1 Resource Centre > Alerts and Notification

The Alerts and Notification function lets the user configure alerts and notification that the system will send/create.

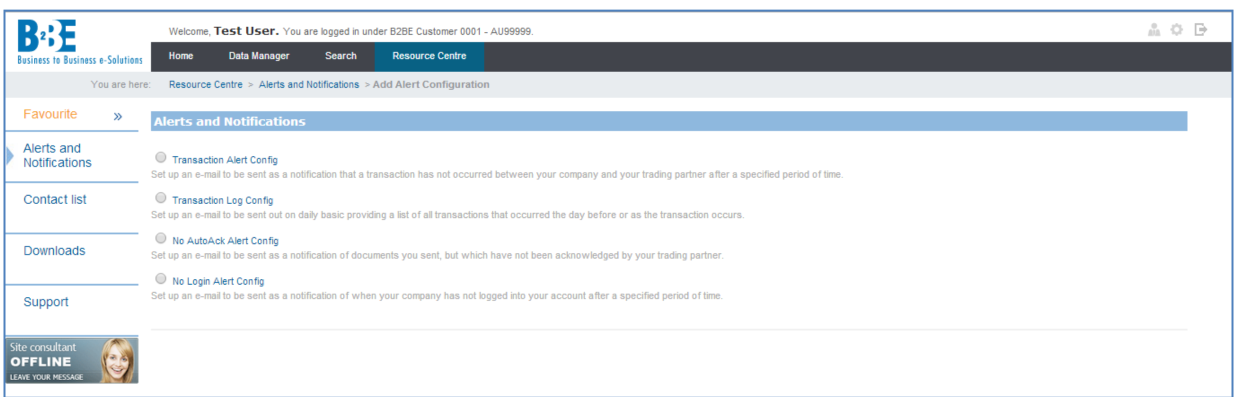
To get to the Alerts and Notification, click on the "Resource Centre" on the Applications Menu from any page then click on the "Alerts and Notification" tab on the left panel.

Figure 7.1.1: Alerts and notifications screen



To create a new alert and notification configuration, click on the "Create New Configuration" button.

Figure 7.1.2: Create new alerts and notifications screen



Select an Alert Type from the list. Options are:

- Transaction Alert – an email notification that can be sent when a transaction has not occurred between your company and your trading partner after a specified period of time.
- Transaction Log – an email notification that can be sent daily providing a list of all transaction that occurred the previous day or as the transaction occurs.
- No Auto-Ack Alert – an email notification that can be sent when no acknowledgement from your trading partner has been received for the documents that you have sent to them
- No Login Alert – an email notification that can be sent when no one from your company has logged into your for a specified period of time.

The Alert and Notification Screen shows a summary with all the notification that has been set up.

Figure 7.1.3: Alert and notification screen – edit & delete

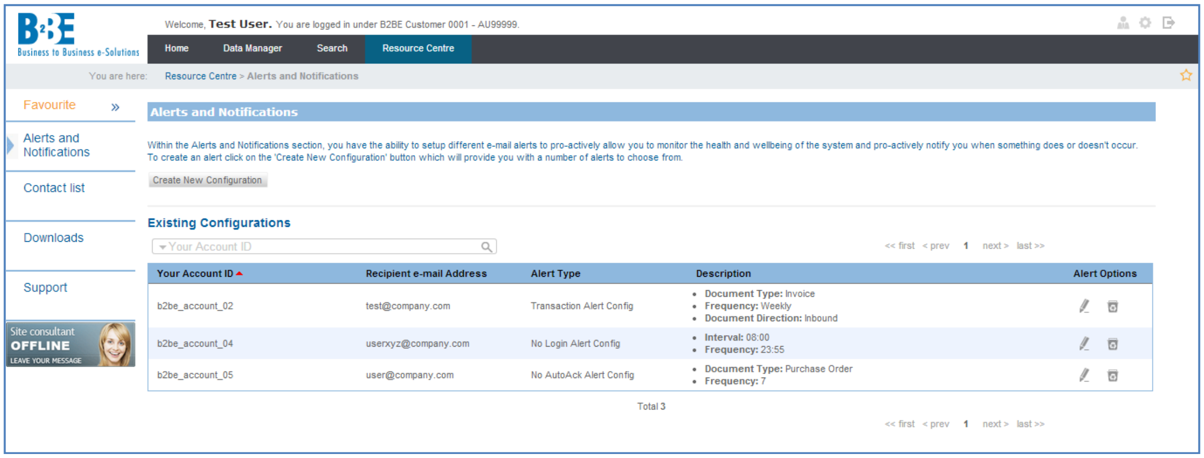


Table 7.1.3: Import data screen fields

Field Name	Description
Account	B2BE Account related to the document.
Recipient E-mail Address	Email where the email notification is being sent to.
Alert Type	Type of alert notification.
Description	Contains a snapshot of the notification setup.

To edit an alert notification, click the corresponding icon.

To delete an alert notification, click the corresponding icon.

7.1.1 Transaction Alert

Transaction Alert is a notification that a transaction has not occurred between your company and your trading partner after a specific period of time.

Figure 7.1.1.1: Transaction alert screen

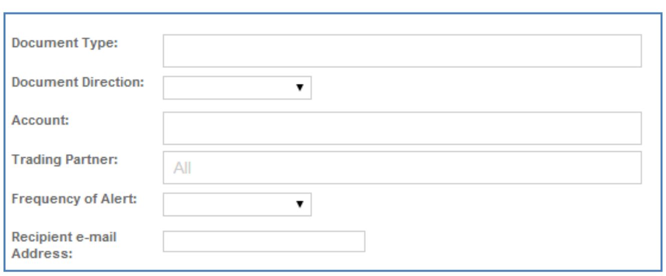


Table 7.1.1.1: Transaction alert fields

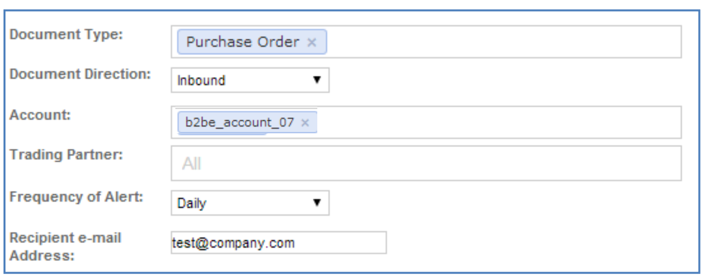
Field Name	Description
Document Type	The type of document to set the alert and notification for. The content of the dropdown list depends on the

Field Name	Description
	document types related to the company and its trading partners.
Document Direction	Direction of the document whether it's Inbound, Outbound or Both.
Account	Account name related to the document.
Trading Partner	Name of the trading partner with which the document is related to.
Frequency of Alert	The frequency to check if a transaction has occurred between your company and the specified trading partner. Choices are Daily, Weekly, Monthly.
Recipient Email Address	The email address where the alert notification will be sent to.

Example scenario:

If you are expecting to receive a purchase order daily from any of your trading partners and wants to be notified if a day has passed without receiving any purchase order from any trading partner, then set a Transaction Alert with the following settings to do so.

Figure 7.1.1.2: Transaction alert sample



7.1.2 Transaction Log

The Transaction log is a notification sent out on a chosen frequency (either daily, weekly or monthly basis) which provides a list of all transactions that has occurred during that span of time.

Figure 7.1.2.1: Transaction log screen

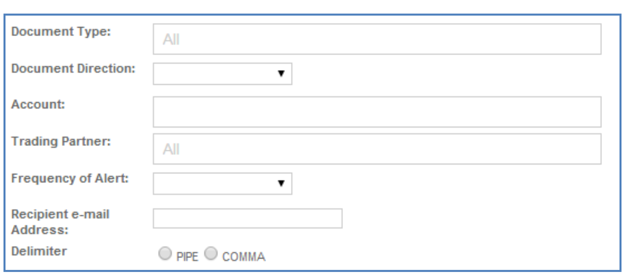


Table 7.1.2.1: Transaction log fields

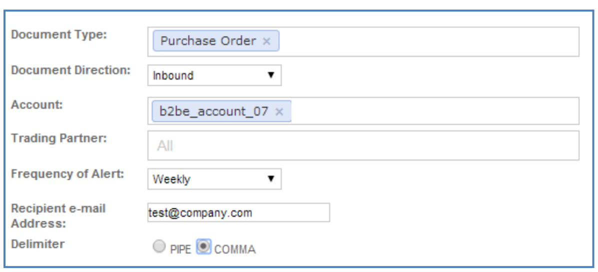
Field Name	Description
Document Type	The type of document to set the alert and notification for. The content of the dropdown list depends on the document types related to the company and its trading

Field Name	Description
	partners.
Document Direction	Direction of the document whether it’s Inbound, Outbound or Both.
Account	Account name related to the document.
Trading Partner	Name of the trading partner with which the document is related to.
Frequency of Alert	The frequency to send the email with attached list of transactions. Choices are Daily, Weekly, Monthly.
Recipient Email Address	The email address where the alert notification will be sent to.
Delimiter	The delimiter to be used to separate a transaction record from another in the file listing all the transaction that has occurred during a specified span of time that will be attached and sent through email. Choices are PIPE “|” or a COMMA “,”.

Example scenario:

If you want to have an email of the list of purchase order that has been received every week from any of your trading partners in csv format, then set a Transaction Log notification with the following settings to do so.

Figure 7.1.2.2: Transaction log sample



7.1.3 No Auto-Ack Alert

The No Auto-Ack Alert is a notification listing the transaction documents that your company has sent out to your trading partners but has not received any auto-acknowledgement for it to confirm that the document has been sent to the trading partner.

Figure 7.1.3.1: No auto-ack alert screen

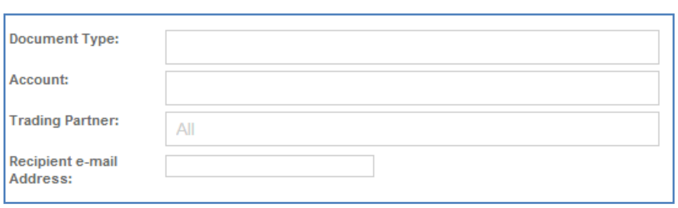


Table 7.1.3.1: No auto-ack alert fields

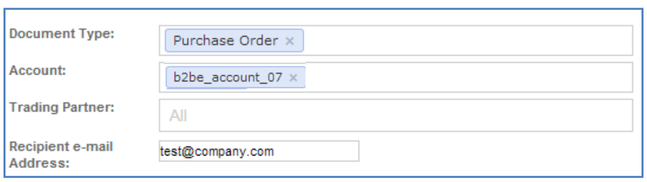
Field Name	Description
Document Type	The type of document to set the alert and notification for. The content of the dropdown list depends on the

Field Name	Description
	document types related to the company and its trading partners.
Account	Account name related to the document.
Trading Partner	Name of the trading partner with which the document is related to.
Recipient Email Address	The email address where the alert notification will be sent to.

Example scenario:

If you want to be notified when your company sends purchase order to any of your trading partners but has not received an acknowledgement back for it, then set a No Auto-Ack Alert with the following settings to do so.

Figure 7.1.3.2: No auto-ack alert sample



7.1.4 No Login Alert

The No Login Alert is a notification for when the specified B2BE account of the company has not been logged into for a specified period of time. This means none of the user(s) with access to the specified account has logged into the B2BE server for a specified period of time. This might mean that the account cannot send or receive transaction documents.

Figure 7.1.4.1: No login alert screen

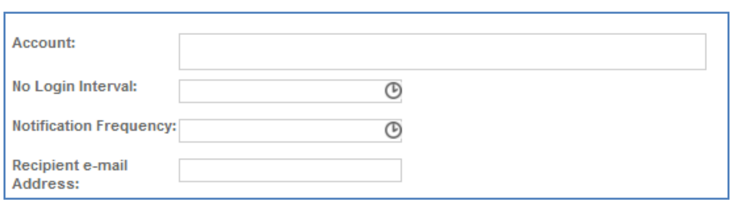


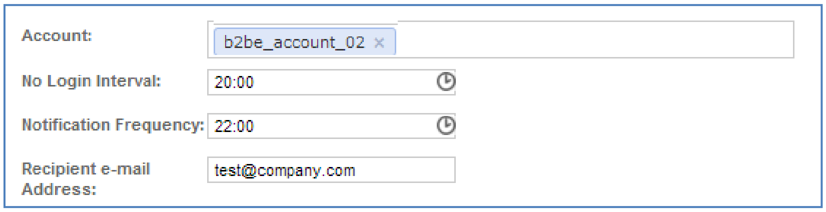
Table 7.1.4.1: No login alert fields

Field Name	Description
Account	Account name related to the document.
No Login Interval	Specify the period of time that when reached and no one has yet logged into the specified account through B2BE Client will trigger the alert.
Notification Frequency	The frequency to send the email with attached list of transactions. Choices are Daily, Weekly, Monthly.
Recipient Email Address	The email address where the alert notification will be sent to.

Example scenario:

If you want to be notified whenever your company has not logged into a specific B2BE Account through B2BE Client at least once every 20 hours and want to be notified of it.

Figure 7.1.4.2: No login alert sample

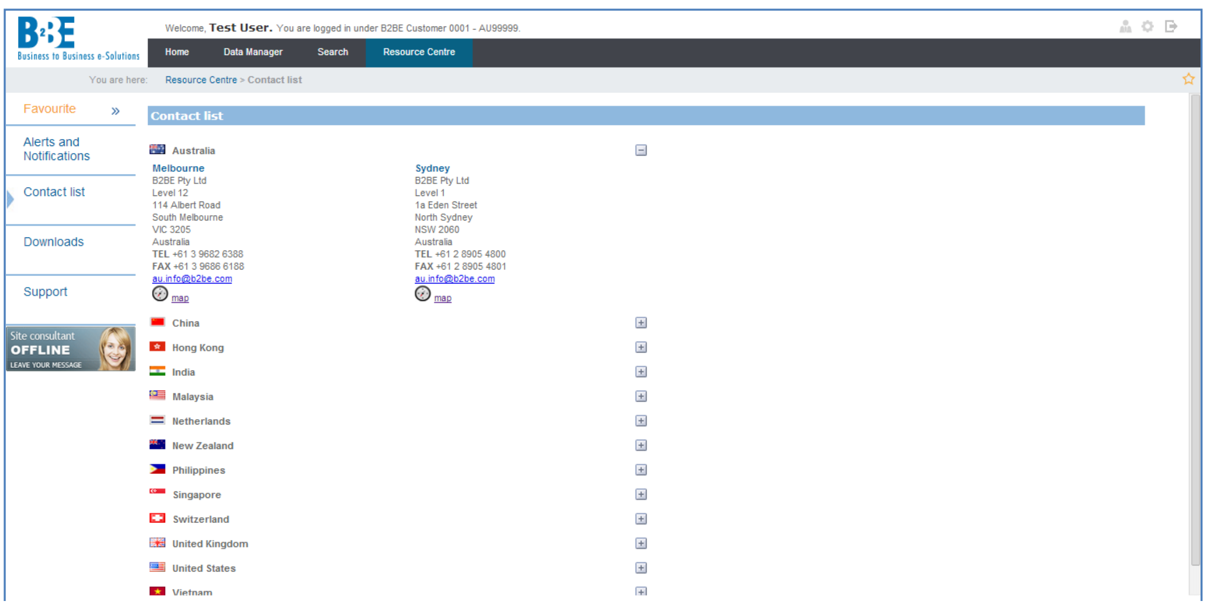


7.2 Resource Centre > Contact List

The Contact List function shows all the contact information of all B2BE global offices.

To get to the Contact List, click on "Resource Centre" on the Applications Menu from any page then click on the "Contact List" tab on the left panel.

Figure 7.2.1: Contact list screen



Click the + button of the corresponding country to view the contact information of the B2BE office located there.

Click on the email link of the corresponding office to send an email to that B2BE office.

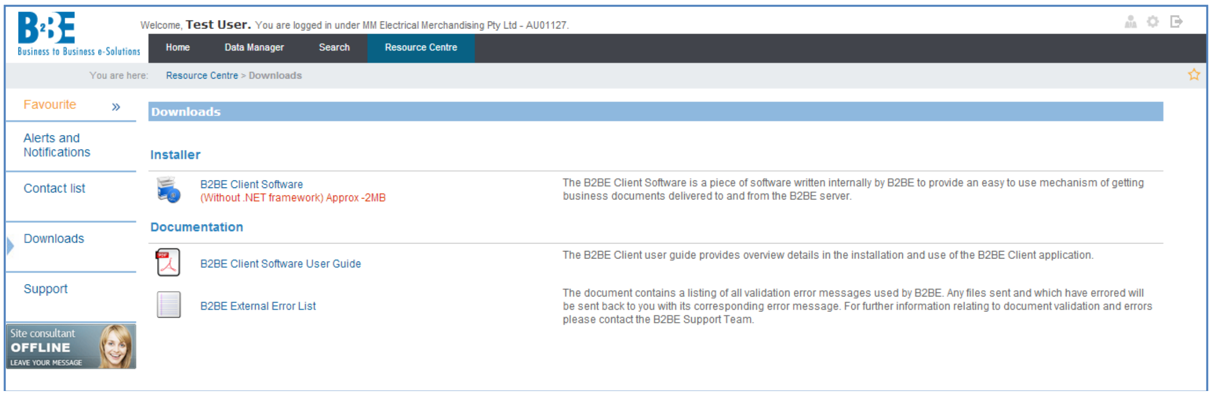
Click on the map link to locate the B2BE office address on the Google Map.

7.3 Resource Centre > Downloads

The Resource Centre function is where all available software and documentations are stored that users can download as needed.

To get to Downloads, click on "Resource Centre" on the Applications Menu from any page then click on the "Downloads" tab on the left panel.

Figure 7.3.1: Download screen



The software will be listed under the Installer header while the documentations will be listed under Documentation header.

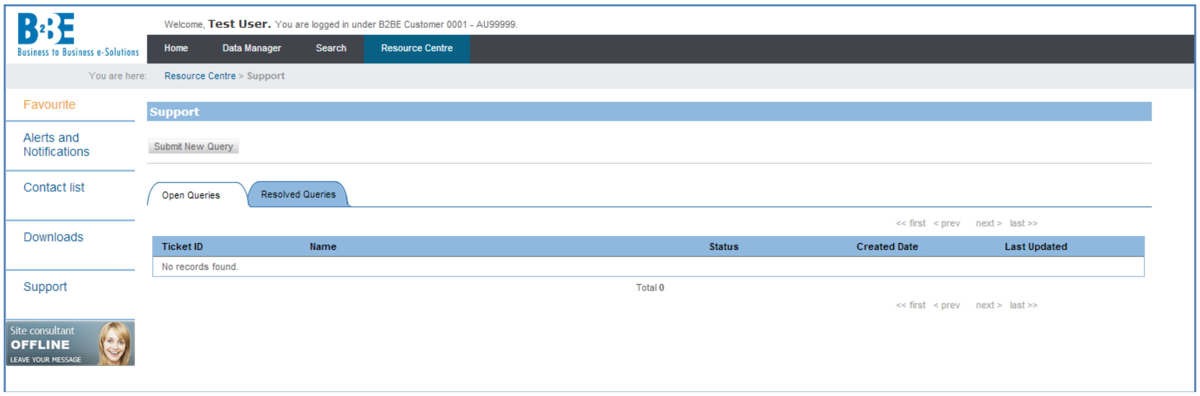
Click on the corresponding name (hyperlink) of the software or document to download it into the local drive of the computer.

7.4 Resource Centre > Support

The Resource Centre function is where users can raise queries so that the B2BE support team can provide assistance to all reported issues.

To get to Support, click on "Resource Centre" on the Applications Menu from any page then click on the "Support" tab on the left panel.

Figure 7.4.1: Support screen



The Support screen will show all the reported issues made by all the users belonging to the same company as the current user.

Table 7.4.1: Support screen fields

Field Name	Description
Ticket ID	The system generated ID assigned to that ticket.
Name	B2BE Account that the ticket is related to.
Status	Status of the support ticket. • Open – The support ticket has been submitted and waiting for action from B2BE support team. Tickets with this status are shown in the Open Queries tab. • Work in Progress – The support ticket has been assigned to a B2BE support and currently being worked on. Tickets with this status are shown in the Open Queries tab. • Closed – The support ticket has been resolved and the issue is closed. Tickets with this status are shown in the Resolved Queries tab.
Date Created	The date when the ticket was created.
Last Updated	The date when the ticket was last updated.

To create a new support ticket, click on the Submit New Query button on the upper left part of the screen.

Figure 7.4.2: Submit new query screen

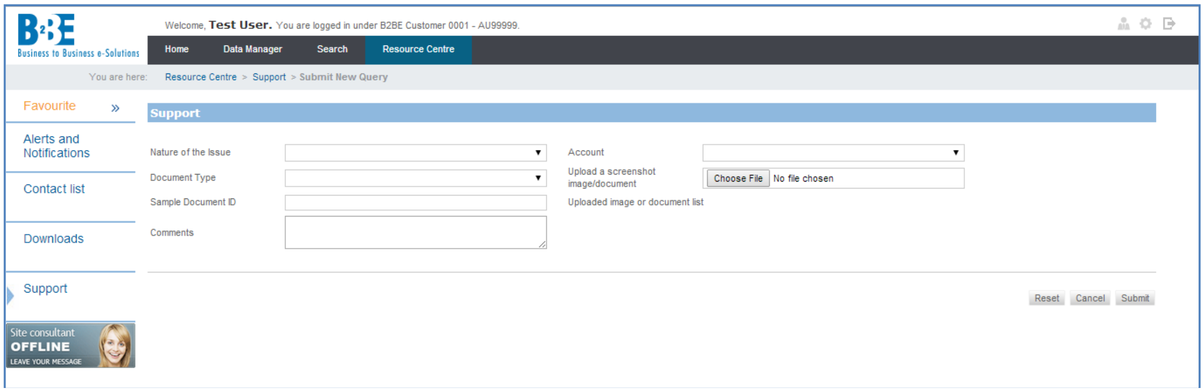


Table 7.4.2: Submit new query fields

Field Name	Description
Nature of the issue	Choose from the following categories that best describes the issue to be submitted. • Not received documents • Not sent documents • B2BE software connection issue • B2BE software configuration issue • B2BE software issue • Network, proxy or firewall issue • Translation mapping issue • Other…
Account	The account that the issue is related to. The dropdown will list all of the account related to the company.
Document Type	The type of document the issue is related to. Options for Document Types are: • Invoice • Purchase Order • Recipient Created Tax Invoice • Product Activity Data • Order Acknowledgment • Despatch Advice • Order Change • Remittance Advice • Price Catalogue • Functional Acknowledgment • Other
Sample Document ID	The user can provide specific document ID as a sample.
Upload a screenshot/image/document	The user can attach one or multiple images/screenshots or document files. Click the Choose File button to pick the file to be attached. Once attached, the name of the file will appear under the "Uploaded image or document list". To attach another file, just click on Choose File button again. To remove a file from attachment, click on corresponding X.

Field Name	Description
Comments	Description or further information regarding the issue.

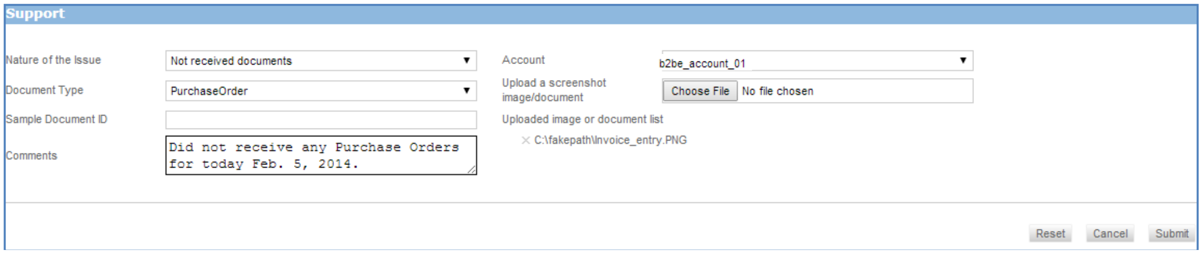
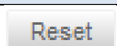
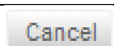
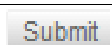
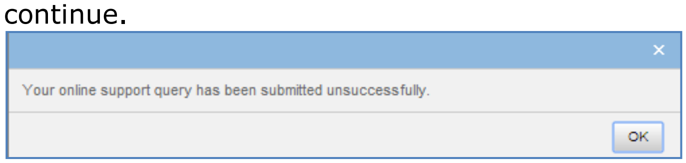


Table 7.4.3: Submit new query buttons

Buttons	Functions
	Found on the bottom right of the Submit New Query screen. Click the Reset button to clear the content of all the fields.
	Found on the bottom right of the Submit New Query screen. Click the Cancel button to exit the Submit New Query screen without submitting any query.
	Found on the bottom right of the Submit New Query screen. Click the Submit button to submit the query to B2BE support team. Once the system has successfully submitted the query, a popup will appear to confirm it. Click OK to continue. 

Once the issue has been submitted, it will create a ticket on the ticketing system used by B2BE support team. The system will also send an email to the group email of B2BE support team to alert them regarding the reported issue.

8 Chat Support

The Chat Support module is to provide users the facility to seek help or report a problem to B2BE support team through a chat interface.

To use the Chat Support module, look for the Chat Support button on the Left Panel and click it.

It is either Offline 

or Online 

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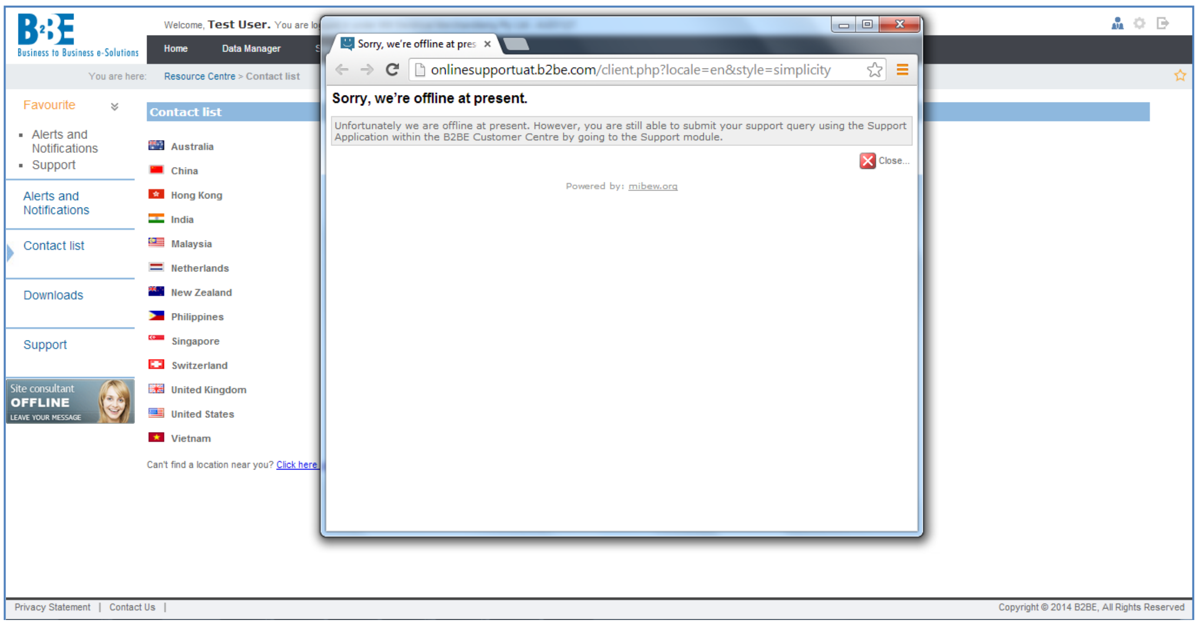
If the button shows Offline, the user will be advised to submit the query through the Support module of Resource Centre.

Figure 8.1: Chat support – offline



Click the Close icon to exit the Offline Chat Support.

If the icon shows Online, the user can submit the issue to open a chat window and wait for the online B2BE support agent to reply.

Figure 8.2: Chat support – online

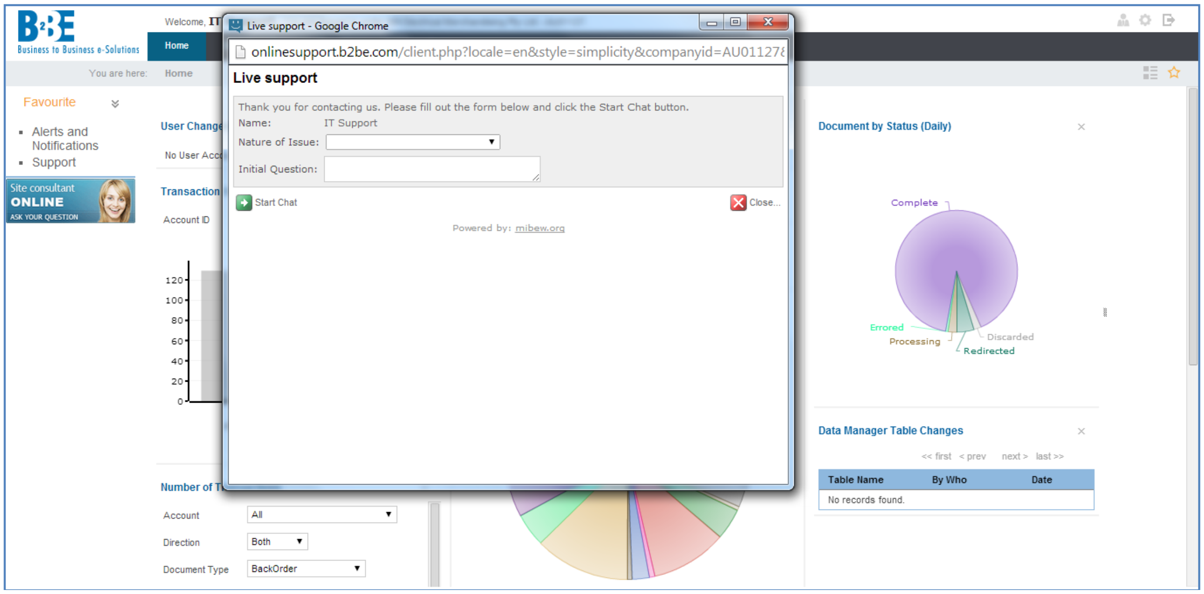


Table 8.2: Online chat module fields

Field Name	Description
Name	The name of the user. Automatically filled.
Nature of Issue	The type of document the issue is related to. Options for Document Types are: • Documents not received • Documents not sent • B2BE software connection issue • B2BE software configuration issue • B2BE software issue • Network, proxy or firewall issue • Translation mapping issue • Other
Initial Question	Question or further details about the issue.

Click the Close icon to exit the Online Chat Support without submitting any issue. Click the Submit icon after keying in the information regarding the issue in the fields to submit it to B2BE support team. A chat window will appear to where the user can chat with a B2BE support agent.

Figure 8.3: Online chat window

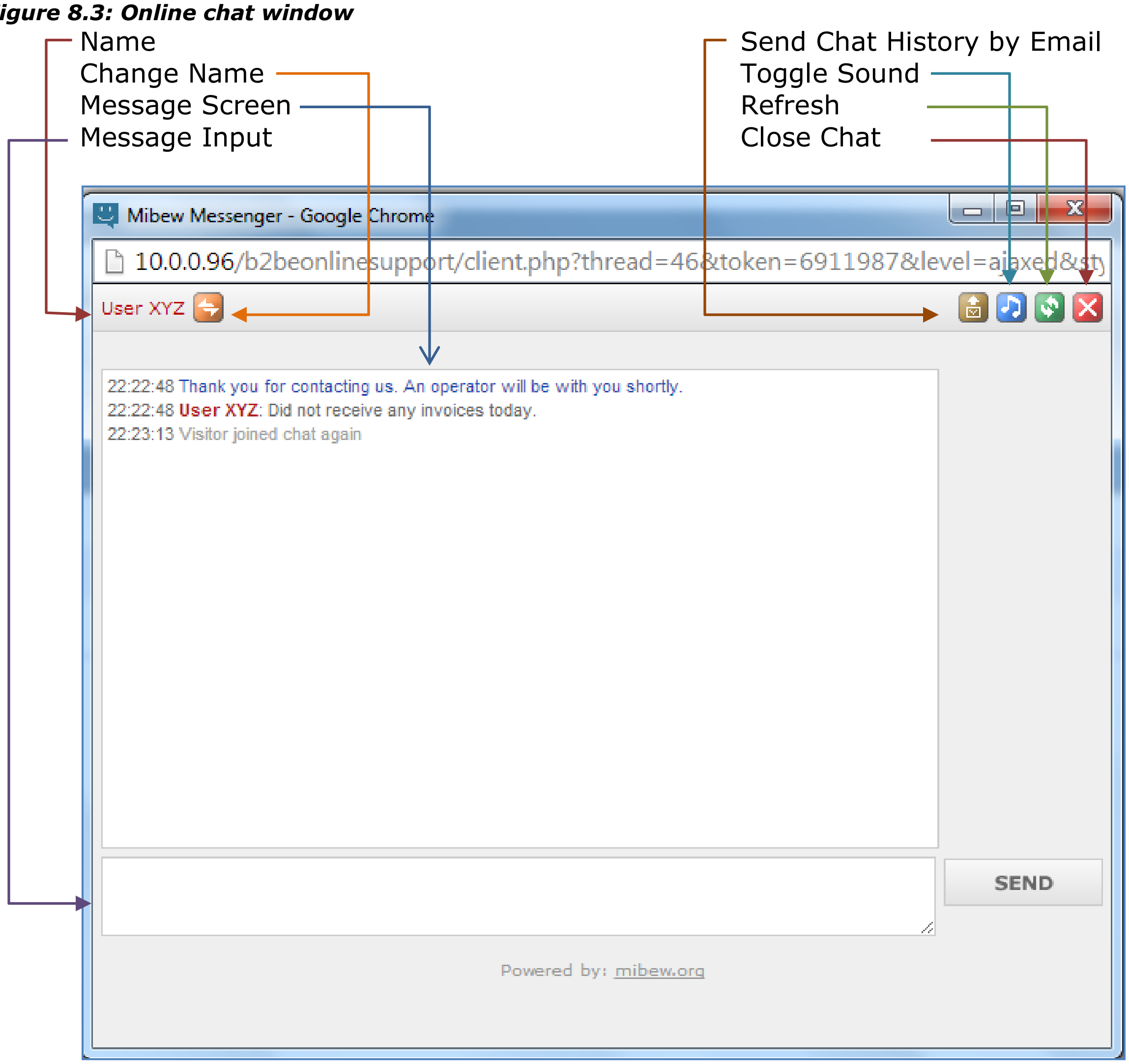
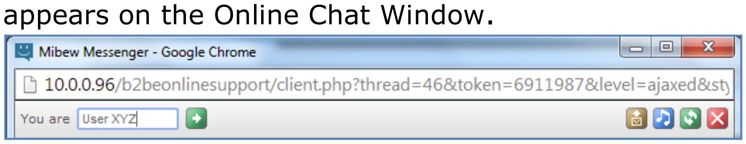
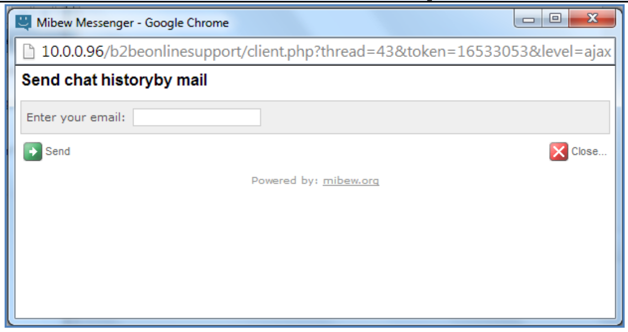
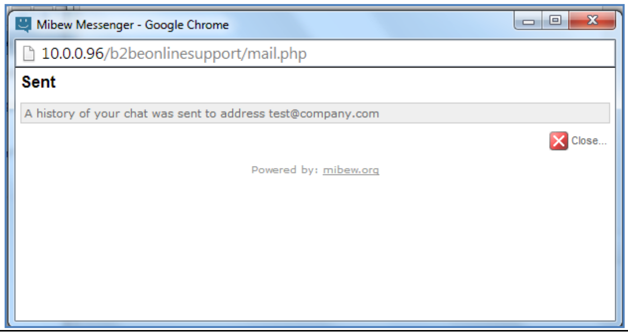


Table 8.3: Anatomy of online chat window

Field Name	Description
Name	The name of the user.
Change Name	Click the Change Name icon to change the user name that appears on the Online Chat Window.  Then type the new user name to be used and click the Submit icon beside the Name text field to commit the change.
Message Screen	Messages that have been sent and received will appear here.
Message Input	Type messages to be sent here then click on the Send button.
Send	Submits the typed in message in the Message Input.
Send Chat History by Email	Email a copy of the chat conversation to an email address. Key in the email address and click the Send icon.

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td></td><td>

Once the email has been sent, a popup will appear to confirm.

</td></tr>
<tr><td>Toggle Sound</td><td>Turn the toggle sound on or off.</td></tr>
<tr><td>Refresh</td><td>Refreshes the chat window to see if any new message has been received.</td></tr>
<tr><td>Close Chat</td><td>End the chat and exit the chat window.</td></tr>
</table>