Collaborator Guide

Member Dashboard
&
Member Uploads

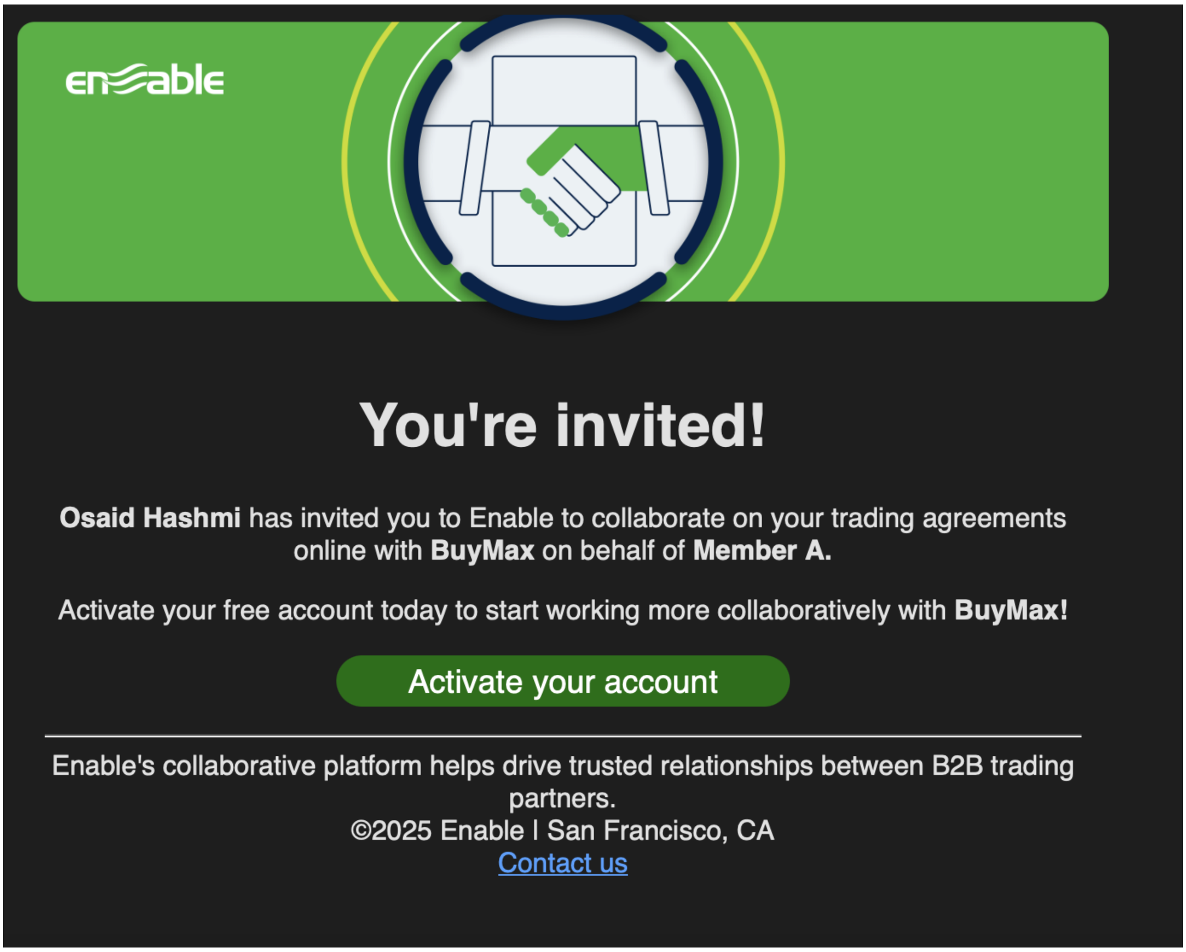
Setting-up Your Accounts with Enable

BuyMax members can leverage two separate areas of the Enable Software, **Member Dashboard** and **Member Uploads**. Each of these areas have their own account and log-in, and as such, must be activated independently.

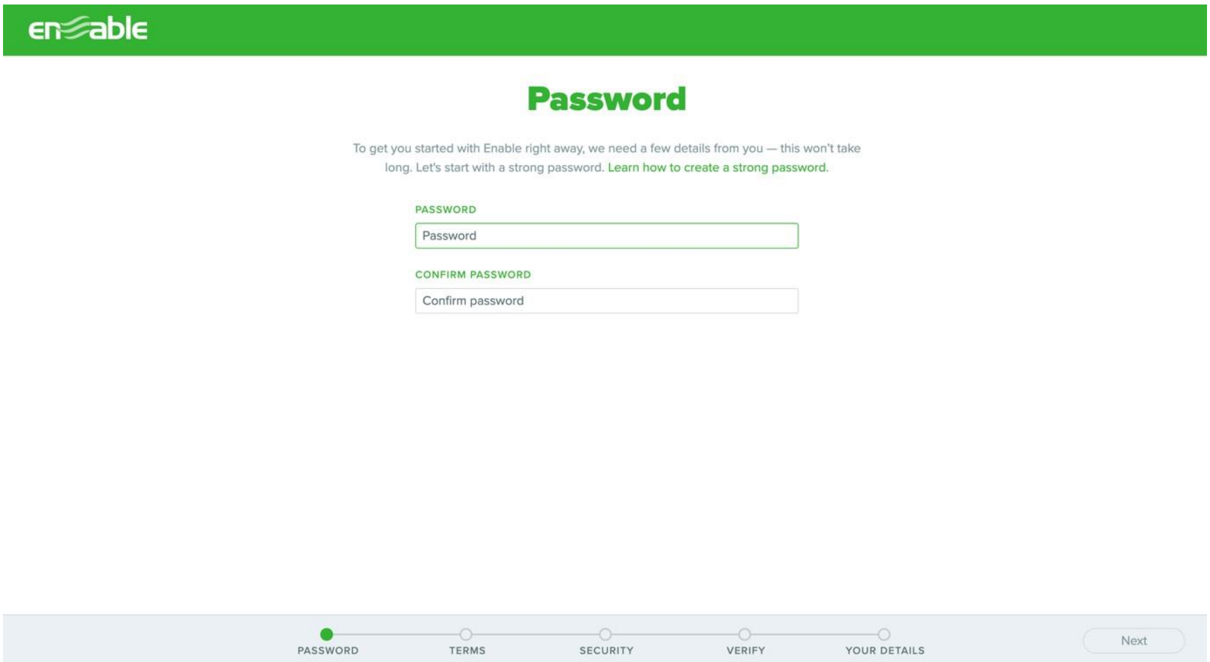
The two guides below will walk through uploading each account. The process will be extremely similar for both. The key difference will be **different emails for each account**. The **Member Dashboard** environment will leverage your regular e-mail (i.e. *user@address.com*). The **Member Uploads** environment will leverage the same email, but with **+uploads** added (i.e. *user+uploads@address.com*). These two addresses will both link to your regular email, but will act as two different log-ins for our system.

Setting-up Your Member Dashboard Account

When you are invited to collaborate by your trading partner, you will receive two emails inviting you to set-up your accounts. These emails will be similar, but directed to the two different addresses mentioned above. The look will be similar to the email displayed below. Click on '*Activate your account*' to begin the set-up process for your **Member Dashboard** account.

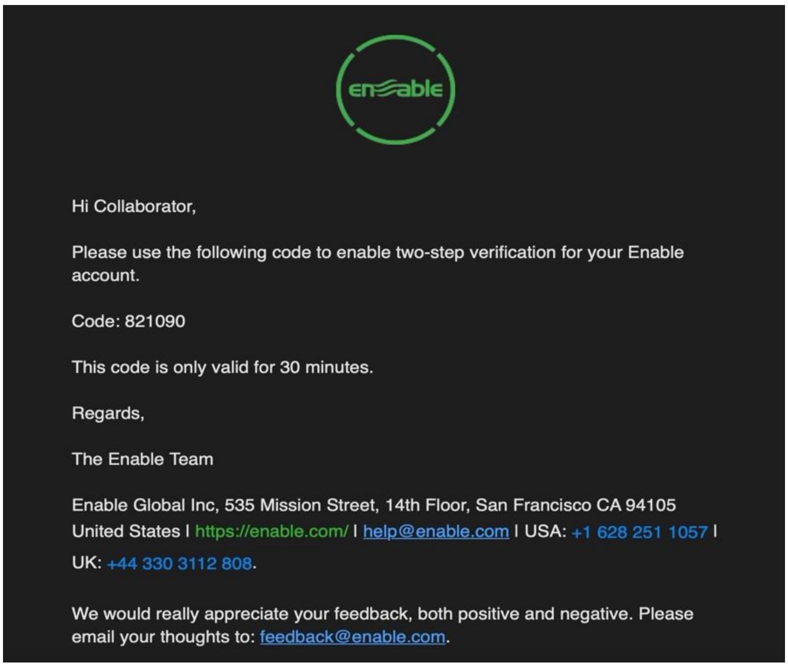


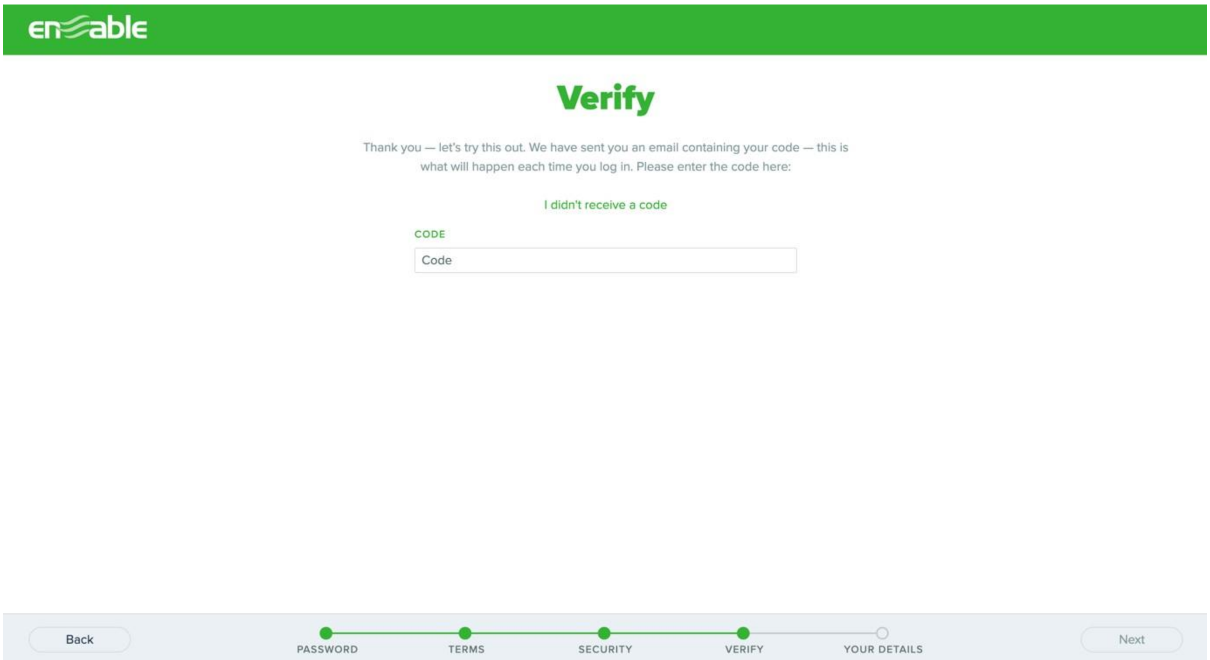
You will be taken to a webpage where you will be asked to set-up a password for your **Member Dashboard** account, enter your chosen password and select '*Next*' at the bottom right of the screen to continue.



Once you have set your password, you can choose to set-up two-factor authentication via email or SMS to your chosen phone number. If you prefer, you may postpone this by clicking the '*Skip*' button on the bottom-right.

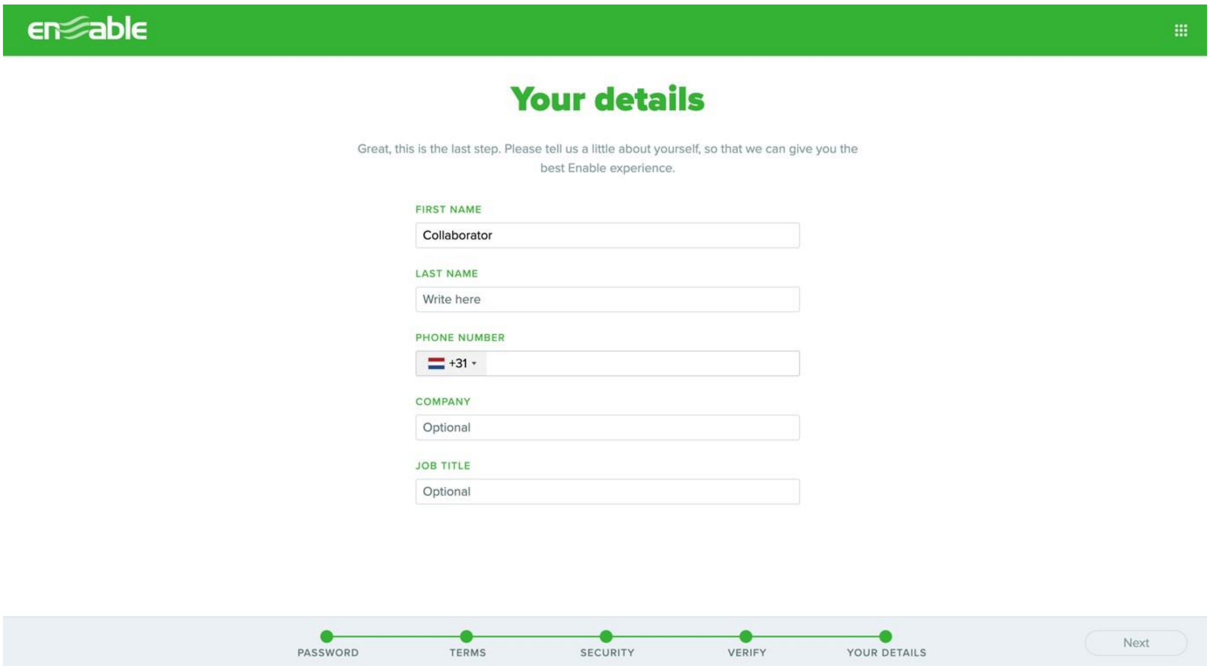
If you choose to enable email two-factor authentication you will receive an email with a code. Enter this code into the box labelled '*CODE*' on the *Verify* screen to verify your Enable account.



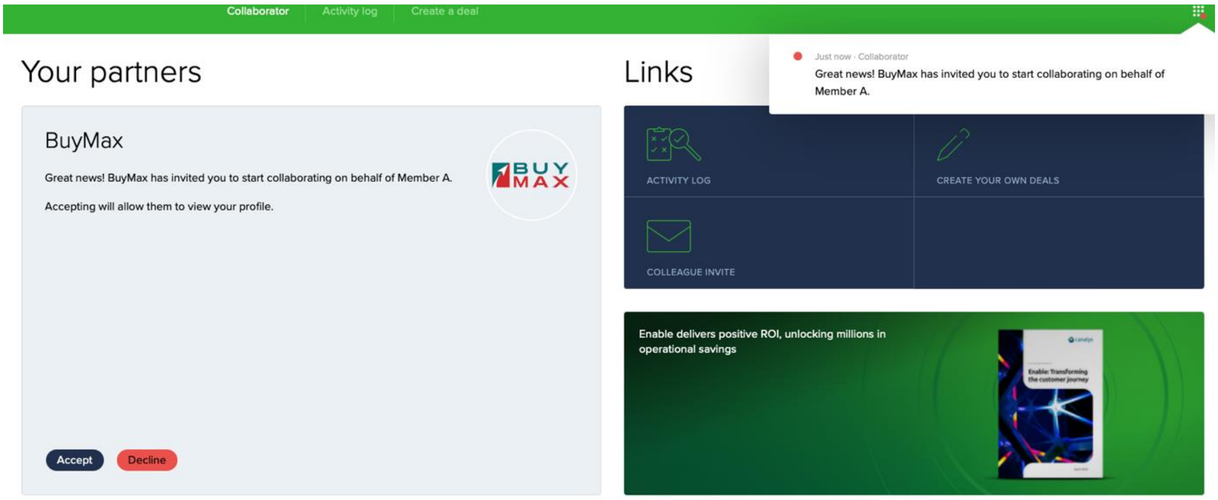


Next, you will be prompted to enter your details, including your full name, phone number, company and job title. Note that the "First Name", "Last Name" & "Phone Number" fields are mandatory, with the remaining details being optional. Once you have completed this, click '*Next*'.

Tip: It may be helpful to differentiate between your multiple logins by adding "Viewing" or "Spend" in your name for the **Partner Dashboard** or **Member Uploads** account respectively (e.g. Member A Viewing).



Once the account set-up is complete, you will be taken to the *Collaborator* homepage. On this page, you will see tiles for each of your trading partners as well as any invitations to collaborate. To accept a collaborator invitation, click on the '*Accept*' button on the trading partner tile.

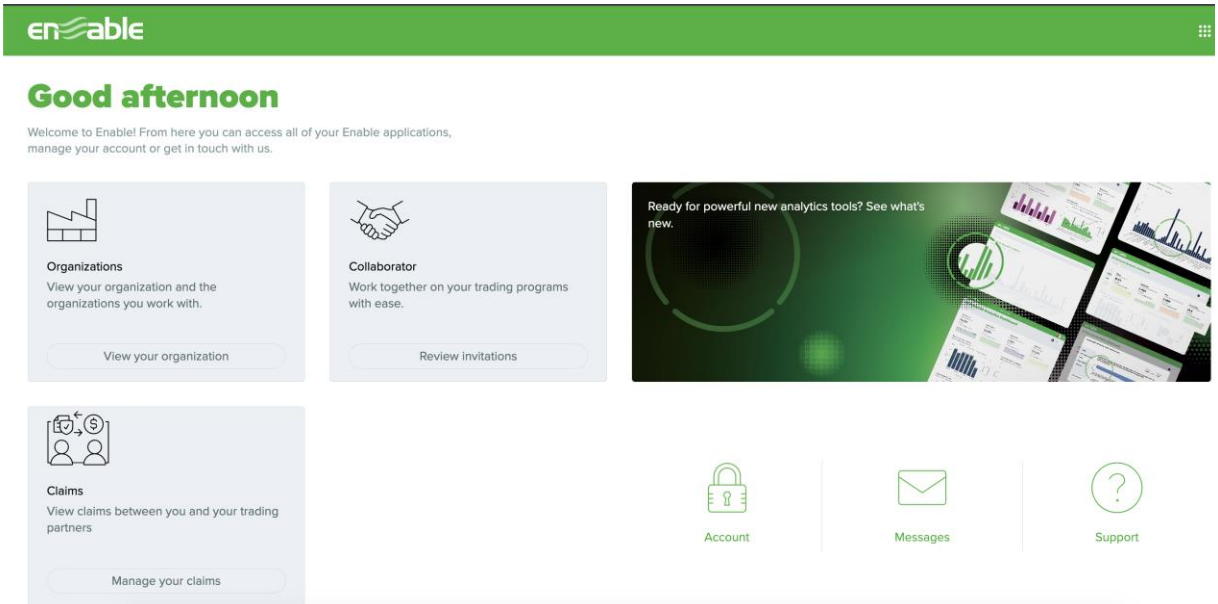


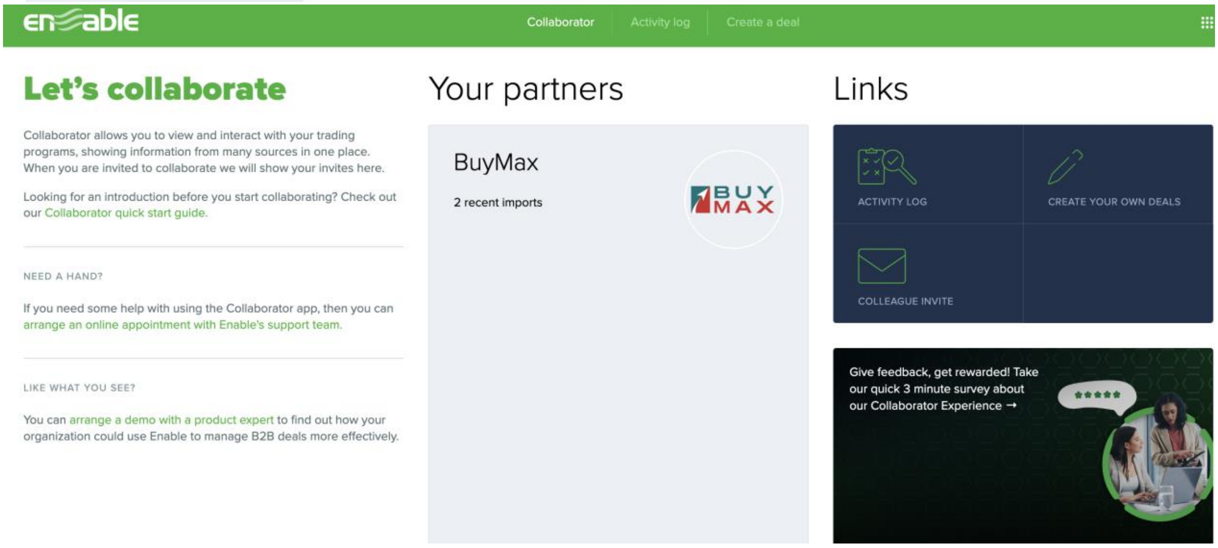
After accepting the invitation to collaborate, you will be taken to your trading partner's **Member Dashboard** landing page.

Member Dashboard

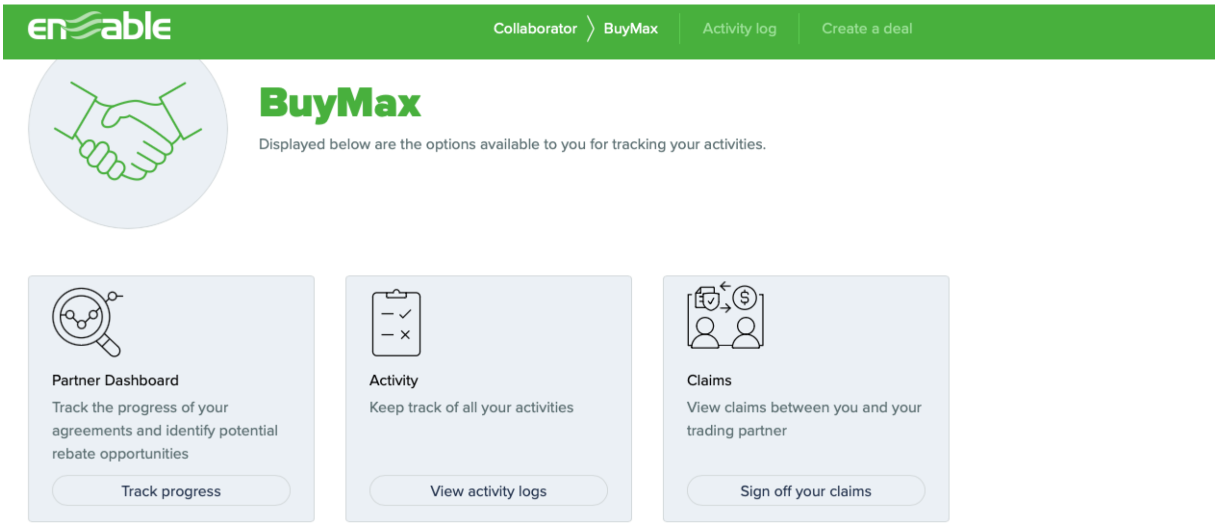
NOTE: You must be fully logged out of your Member Uploads Account to access your Member Dashboard Account. The log-out option can be found using the 9-dot option tile in the top-right of the screen.

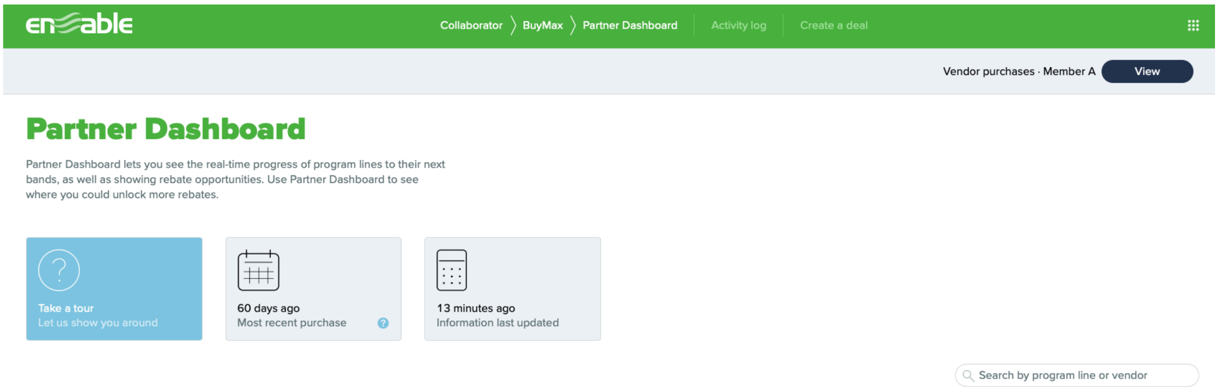
To view *Member Dashboard*, click on the '*Collaborator'* tile on the initial Enable Welcome page. You will then be taken to a new page with a '*BuyMax'* tile.





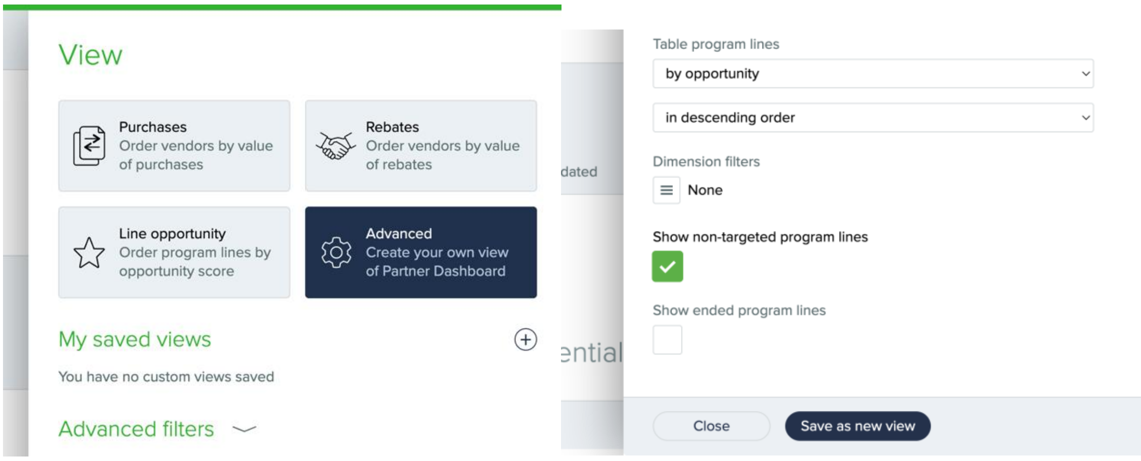
After you click on the '*BuyMax'* tile, you should then see a '*Track Progress*' button on the Member Dashboard tile shown on the BuyMax landing page – this will take you to the Member Dashboard, displaying the current progress of your rebate programs.



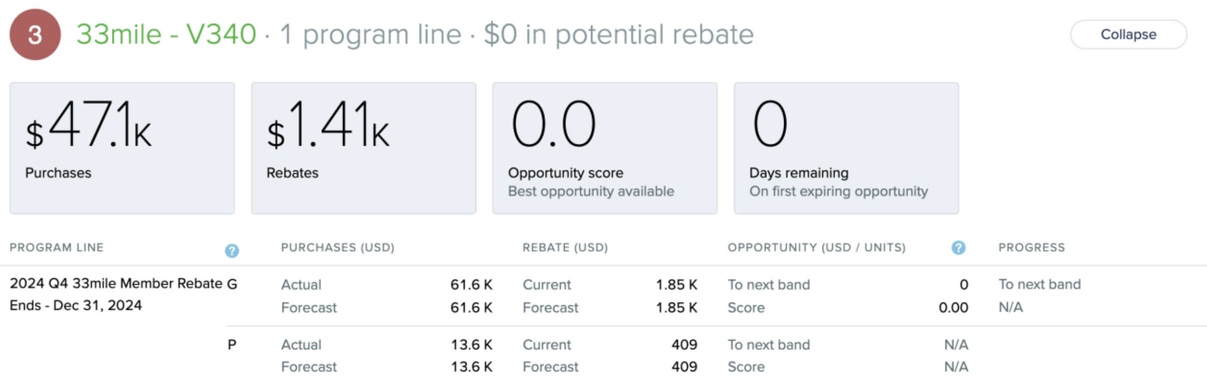


The Member Dashboard provides an overview of your programs with your BuyMax Vendors. From here, you can see your purchases and earnings as reported by your vendors, based on the most recent data available.

To see all earnings, be sure to adjust your Filters! Using the **View** button to the right, and accessing the **Advanced** options, include **Show non-targeted program lines** to get a full picture of your earnings. If you are interested in historic tears of data, select the **Show ended program lines** box. If you find a view or filter you particularly like, select **Save as New View** to jump to it quickly. We recommend saving the "Show non-targeted program lines" selection as a new view, and treating it like your default view. If you want to re-order vendors based on your spend with them, click on the dropdown **by opportunity** and change it to **by program line purchases.**



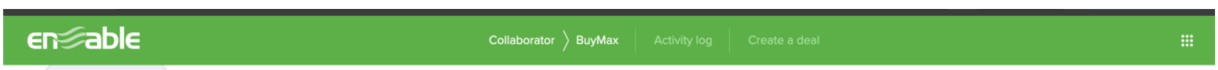
Each vendor is separated into an individual group, with headline tiles and details. The details breakdown your current spend and earnings with this vendor, based on your BuyMax program, broken out by Quarter. For more details on each tile, watch the video in the website, or use the Take a Tour option at the top of the page.



The first vendor visible will be your **Total Earnings Vendor**. This tile shows your aggregated earnings and purchases across all vendors, along with any deductions, again, broken by quarter.

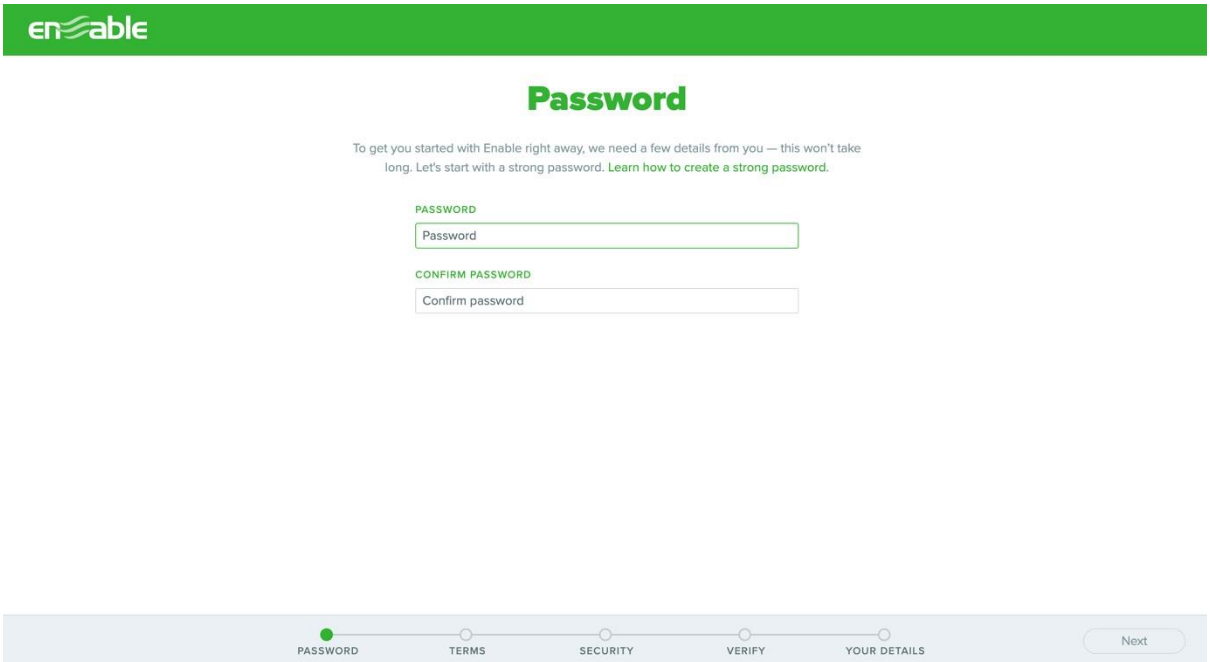
Setting-up Your Member Uploads Account

NOTE: You must be logged out of your Member Dashboard Account to activate your Member Uploads Account. The log-out option can be found using the 9-dot option tile in the top-right of the screen.



When you are invited to collaborate by your trading partner, you will receive two emails inviting you to set-up your accounts. The above **Member Dashboard** log-in was the first email (sent to user@address.com). The second email contains the log-in for **Member Uploads**, and will is sent to user+uploads@address.com or an alternative secondary email you provided to BuyMax**.** Similar to the above process, click on '*Activate your account*' in the second email to begin the set-up process for your **Member Uploads** account.

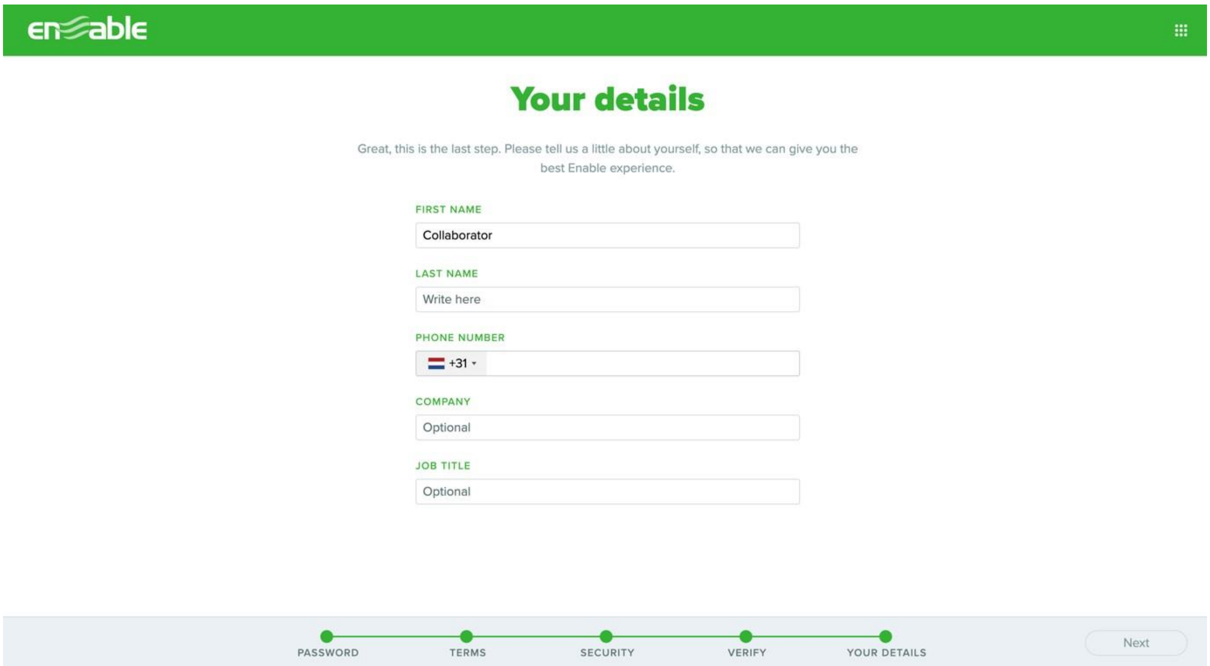
You will again be taken to a webpage where you will be asked to set-up a password for your **Member Uploads** account. You may use the same password, or a new one. Enter your chosen password and select '*Next*' at the bottom right of the screen to continue.



Once you have set your password, you will again be prompted to enable two-factor authentication and have the option to skip again. If you choose to enable 2FA, you will receive an email, directed to the user+uploads@address.com /secondary email with your verification code.

Next, you will be prompted to enter your details, including your full name, phone number, company and job title. Again, the "First Name", "Last Name" & "Phone Number" fields are mandatory, with the remaining details being optional. Once you have completed this, click '*Next*'.

Tip: It may be helpful to differentiate between your multiple logins by adding "Viewing" or "Spend" in your name for the **Partner Dashboard** or **Member Uploads** account respectively (e.g. Member A Spend).



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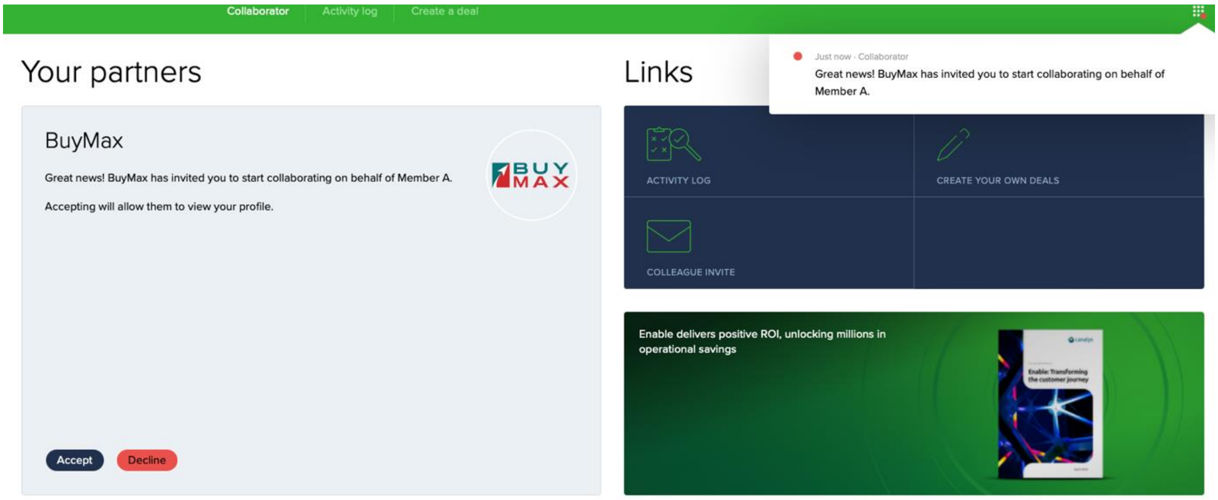
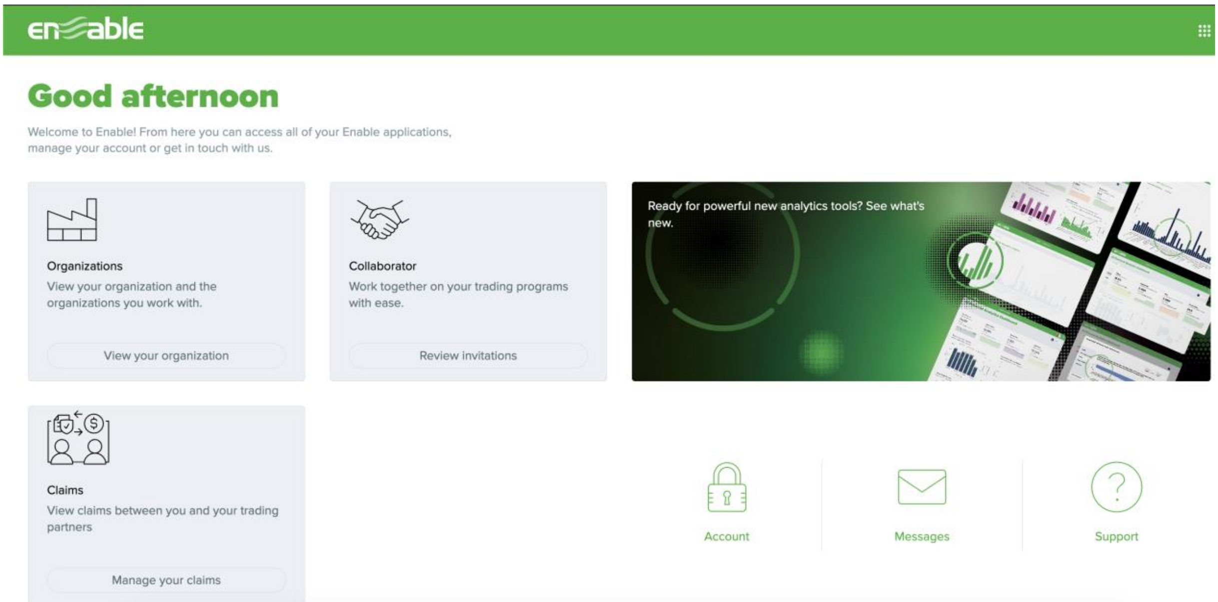


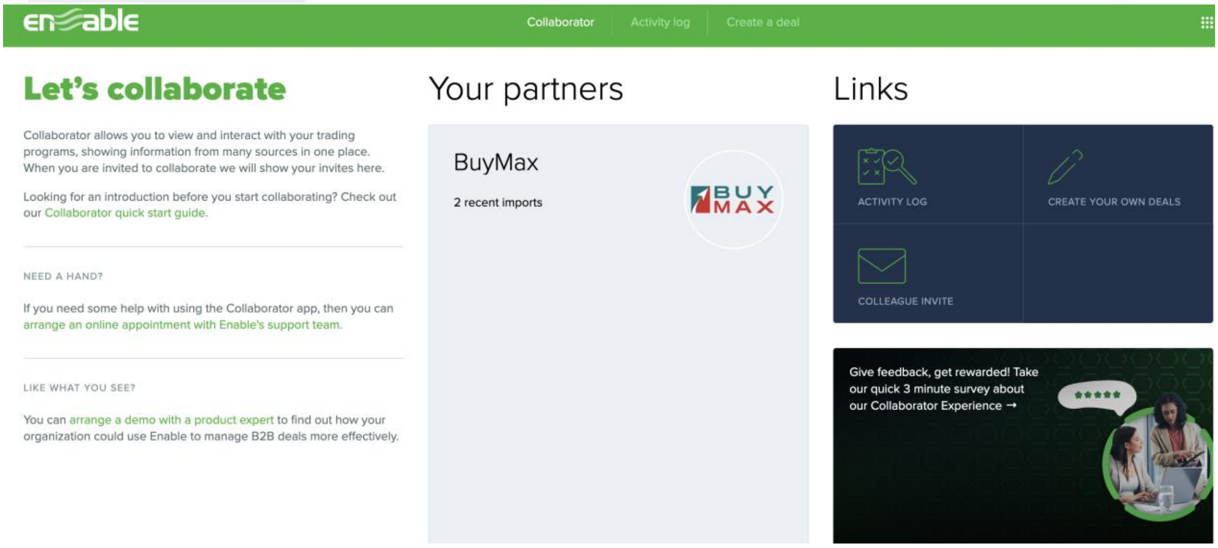
After accepting the invitation to collaborate, you will be taken to your trading partner's **Member Uploads** landing page.

Importing Self-Reported Spend

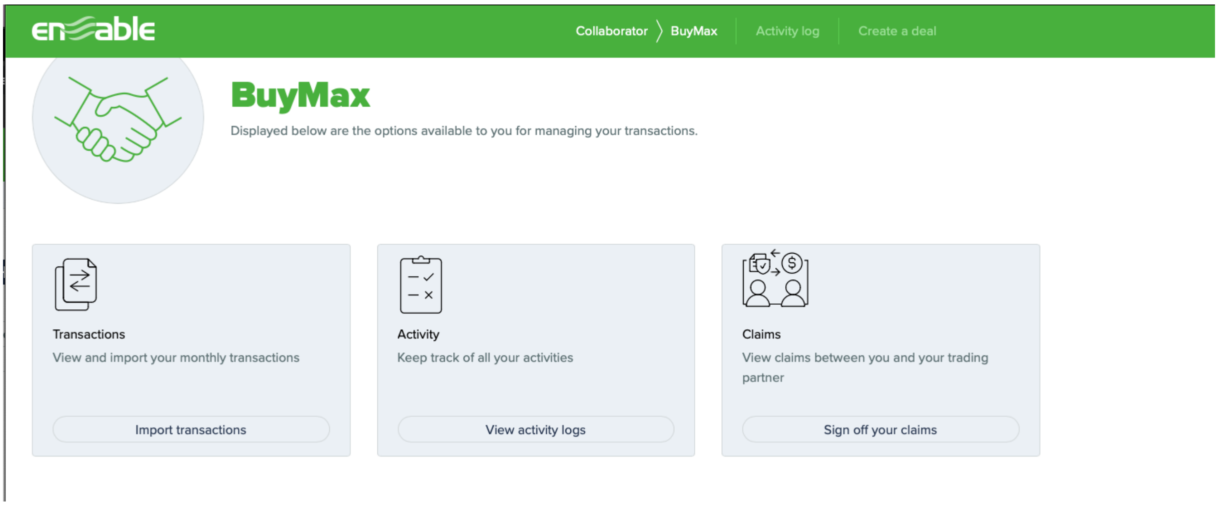
NOTE: You must be fully logged out of your Member Dashboard Account to access your Member Uploads Account. The log-out option can be found using the 9-dot option tile in the top-right of the screen.

To access the transactions area in the Collaborator platform, click on the '*Collaborator'* tile on the initial Enable Welcome page. You will be taken to a new page with a '*BuyMax'* tile.





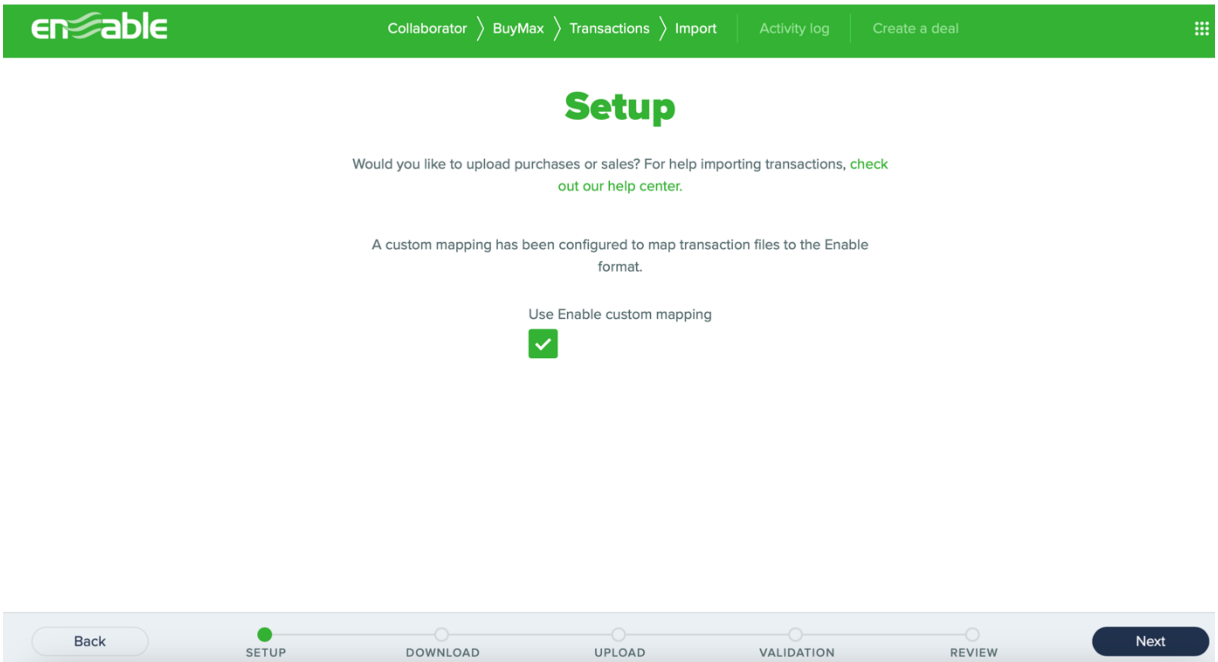
After clicking the *'BuyMax'* tile, click on the '*Transactions*' tile on the Collaborator landing page.



This will bring you to the transactions landing page pictured below. Once here, you are presented with a brief summary of the transactions imported for the last three months.

To submit transactions for your collaborator trading partner, click on the '*Import transactions*' button shown on the trading partner landing page – this will take you to the transactions import wizard. Once in the wizard select the 'Use Enable custom mapping' check box.

Click 'Next'.



By selecting 'Use Enable custom mapping' you will be taken immediately to the Upload screen, where you will be asked to import the transactions file with the following headers:

- Vendor
- Distributor
- Account #
- Amount

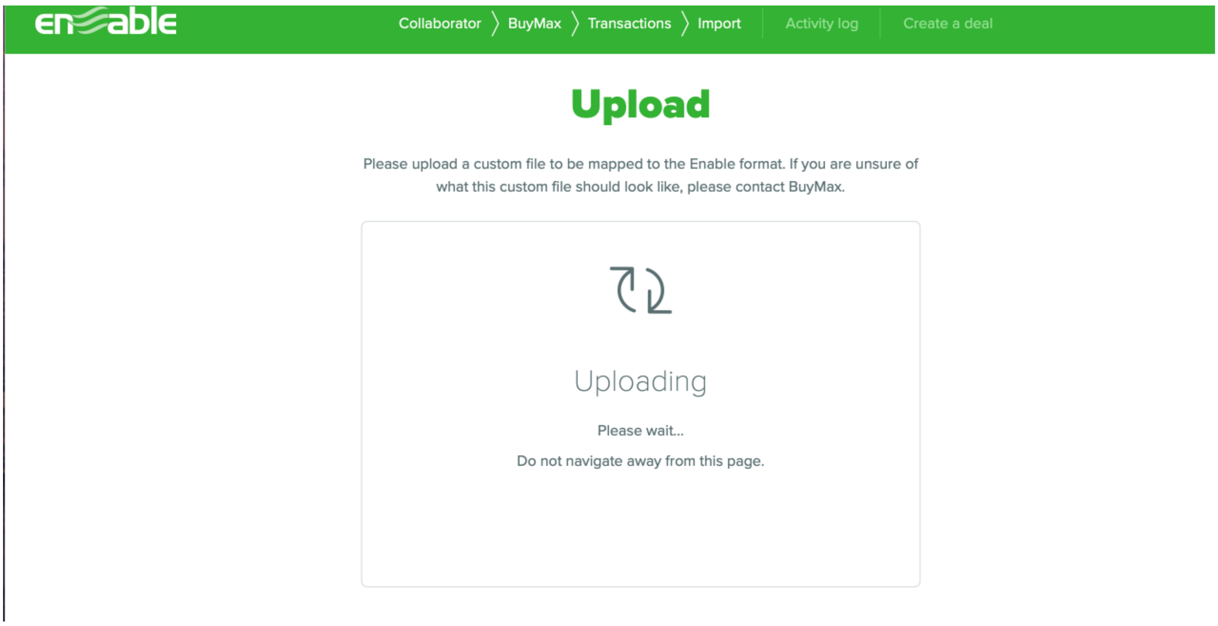
Download the template here: https://insights.enable.com/collaborator-buy-max

The file headers can accept the following data formats:

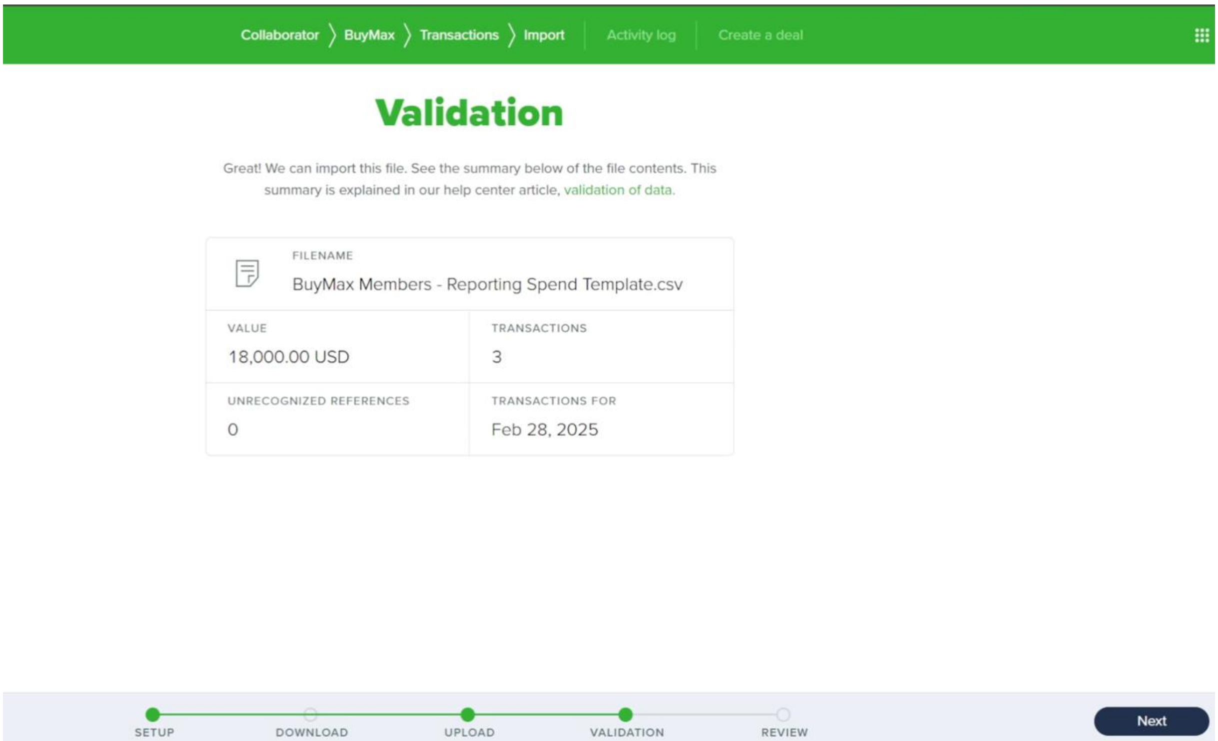
- Vendor: Pre-populated
- Distributor: Enable will accept any data format (optional field)
- Account #: Enable will accept any data format (optional field)
- Amount: Enable will accept any number format (please remove symbols like $ or ,)

Note, if you have multiple distributors for a single vendor, feel free to copy the row as many times as needed! However, please do not modify the formatting/headers any other way.

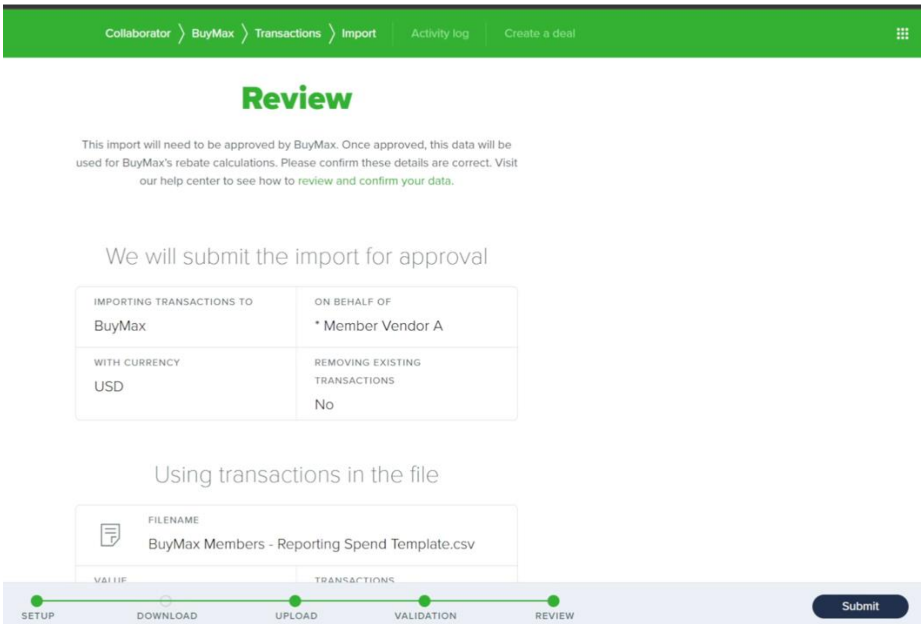
When you are ready to upload the transactions, select the *'Upload'* tile and select the transactions imports template from your device.

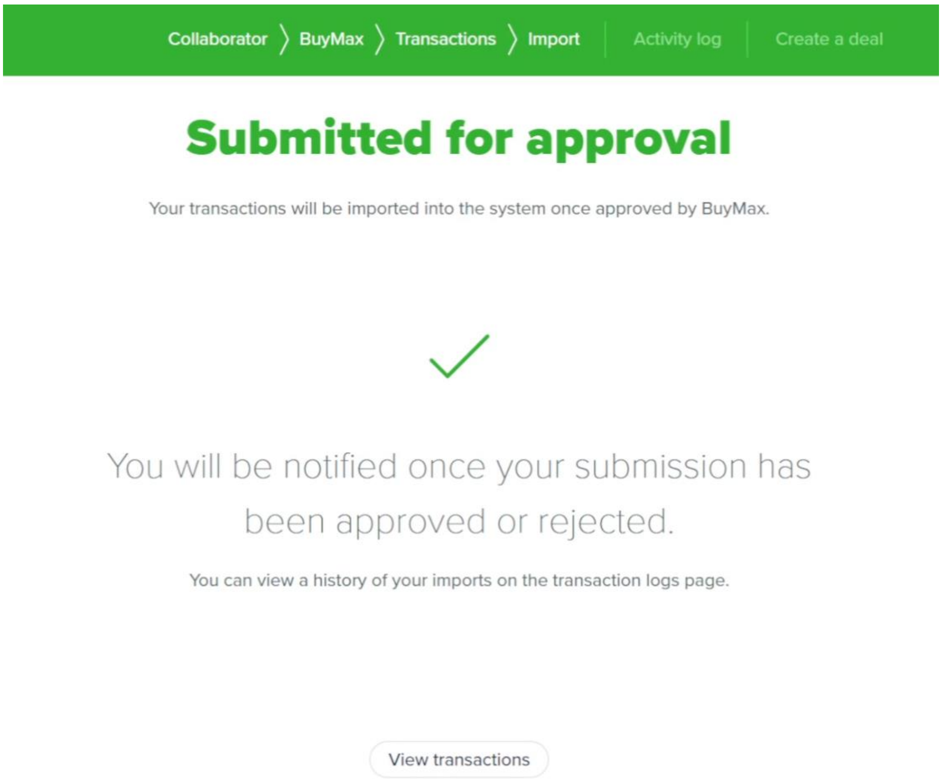


Once the transaction import file is successfully uploaded, a summary of the imported data will appear, as well as a list of any unrecognised references. These references will need to be updated for the transactions to be successfully imported into your trading partner's channel and contribute to the rebate calculations.
If you are unsure of how to correct this, please reach out to BuyMax or to the Enable support team by raising a ticket (https://help-center.enable.com/hc/en-gb/requests/new) or emailing help@enable.com.

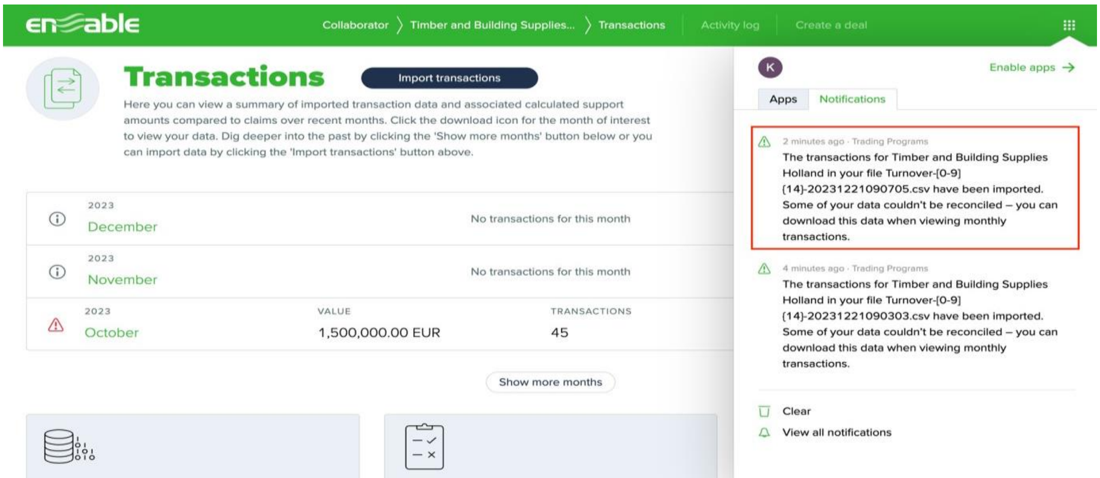


Once you have reviewed the validation summary and are happy to upload the transactions, click *'Next'*. Please ensure that you are reporting spend for the previous quarter only (indicated in "Transactions For" in the validation summary). This will take you to the final review screen which is a final check prior to upload, once you are happy to proceed and submit the transactions, click *'Submit'*.



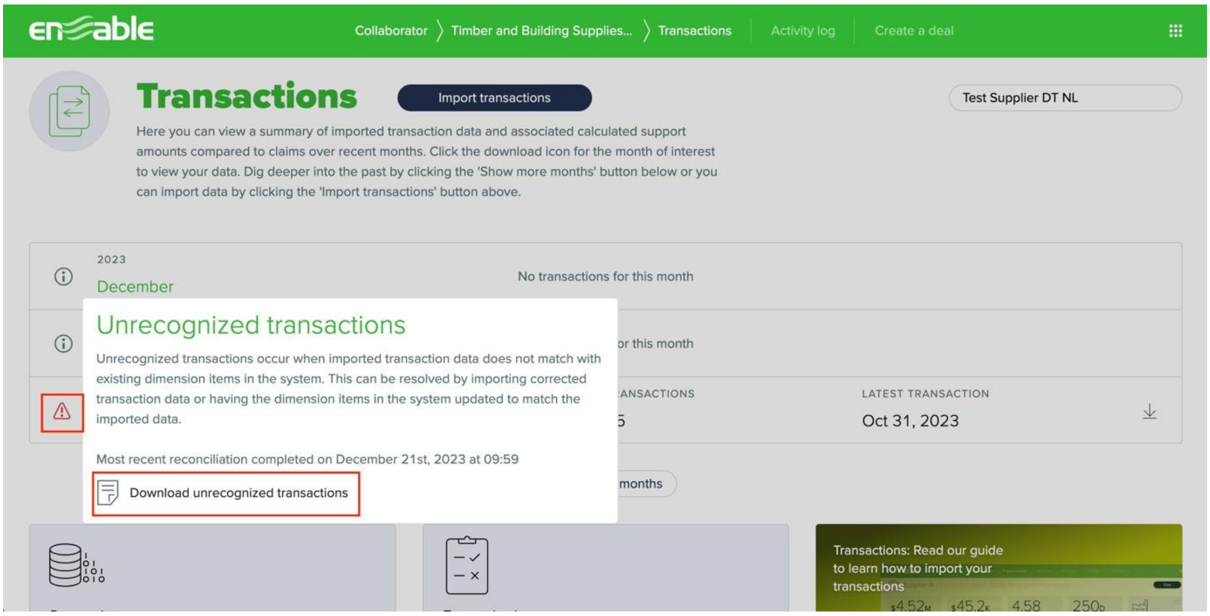


To see a review of all transactions submitted, select the *'View transactions'* icon.

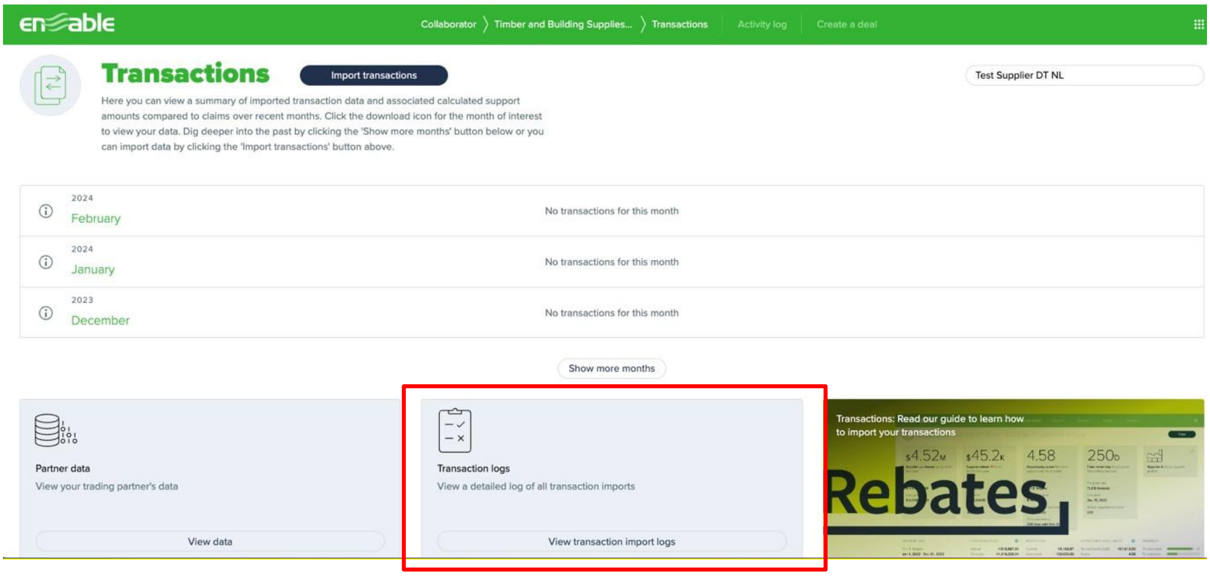


Following the approval of the transactions import, the system will take a few moments to reconcile the transactions and will notify you once the transactions have been successfully imported into your Buy Max's channel.

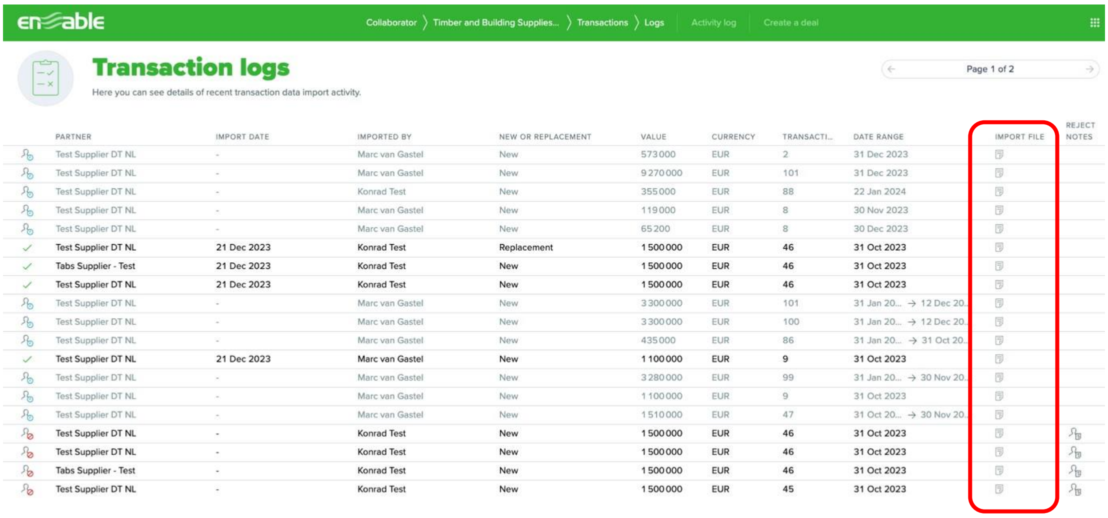
If any records could not be reconciled, you can download a full report by clicking on the red triangle symbol against the appropriate month and downloading the csv report by selecting the report icon:



To view a log of the transactions that have been imported, click the *'Transaction logs'* tile in the transactions landing page.



The following screen will be shown, giving details for each import, the file that was imported, and notes if the file was rejected. (Please note all of the data you see below is fictitious)



enable Collaborator 〉 Timber and Building Supplies... 〉 Transactions 〉 Logs Activity log Create a deal

Transaction logs

Here you can see details of recent transaction data import activity.

Page 1 of 2

PARTNER	IMPORT DATE	IMPORTED BY	NEW OR REPLACEMENT	VALUE	CURRENCY	TRANSACTI...	DATE RANGE	IMPORT FILE	REJECT NOTES
Test Supplier DT NL	-	Marc van Gastel	New	573 000	EUR	2	31 Dec 2023		
Test Supplier DT NL	-	Marc van Gastel	New	9 270 000	EUR	101	31 Dec 2023		
Test Supplier DT NL	-	Konrad Test	New	355 000	EUR	88	22 Jan 2024		
Test Supplier DT NL	-	Marc van Gastel	New	119 000	EUR	8	30 Nov 2023		
Test Supplier DT NL	-	Marc van Gastel	New	65 200	EUR	8	30 Dec 2023		
Test Supplier DT NL	21 Dec 2023	Konrad Test	Replacement	1 500 000	EUR	46	31 Oct 2023		
Tabs Supplier - Test	21 Dec 2023	Konrad Test	New	1 500 000	EUR	46	31 Oct 2023		
Test Supplier DT NL	21 Dec 2023	Konrad Test	New	1 500 000	EUR	46	31 Oct 2023		
Test Supplier DT NL	-	Marc van Gastel	New	3 300 000	EUR	101	31 Jan 20... → 12 Dec 20...		
Test Supplier DT NL	-	Marc van Gastel	New	3 300 000	EUR	100	31 Jan 20... → 12 Dec 20...		
Test Supplier DT NL	-	Marc van Gastel	New	435 000	EUR	86	31 Jan 20... → 31 Oct 20...		
Test Supplier DT NL	21 Dec 2023	Marc van Gastel	New	1 100 000	EUR	9	31 Oct 2023		
Test Supplier DT NL	-	Marc van Gastel	New	3 280 000	EUR	99	31 Jan 20... → 30 Nov 20...		
Test Supplier DT NL	-	Marc van Gastel	New	1 100 000	EUR	9	31 Oct 2023		
Test Supplier DT NL	-	Marc van Gastel	New	1 510 000	EUR	47	31 Oct 20... → 30 Nov 20...		
Test Supplier DT NL	-	Konrad Test	New	1 500 000	EUR	46	31 Oct 2023		
Test Supplier DT NL	-	Konrad Test	New	1 500 000	EUR	46	31 Oct 2023		
Tabs Supplier - Test	-	Konrad Test	New	1 500 000	EUR	46	31 Oct 2023		
Test Supplier DT NL	-	Konrad Test	New	1 500 000	EUR	45	31 Oct 2023		

You can then download the file of interest from the **IMPORT FILE** icon on the right hand column (Note: This file will be in a slightly different format from the uploaded file, but will contain the same data that was uploaded).

For further information regarding collaborator, Member Dashboard and Member Uploads please visit out collaborator help-centre:

[Collaborator help-center homepage]

[Getting started with Collaborator]

[Importing transactions]