



Collaborator Guide

Member Dashboard
&
Member Uploads

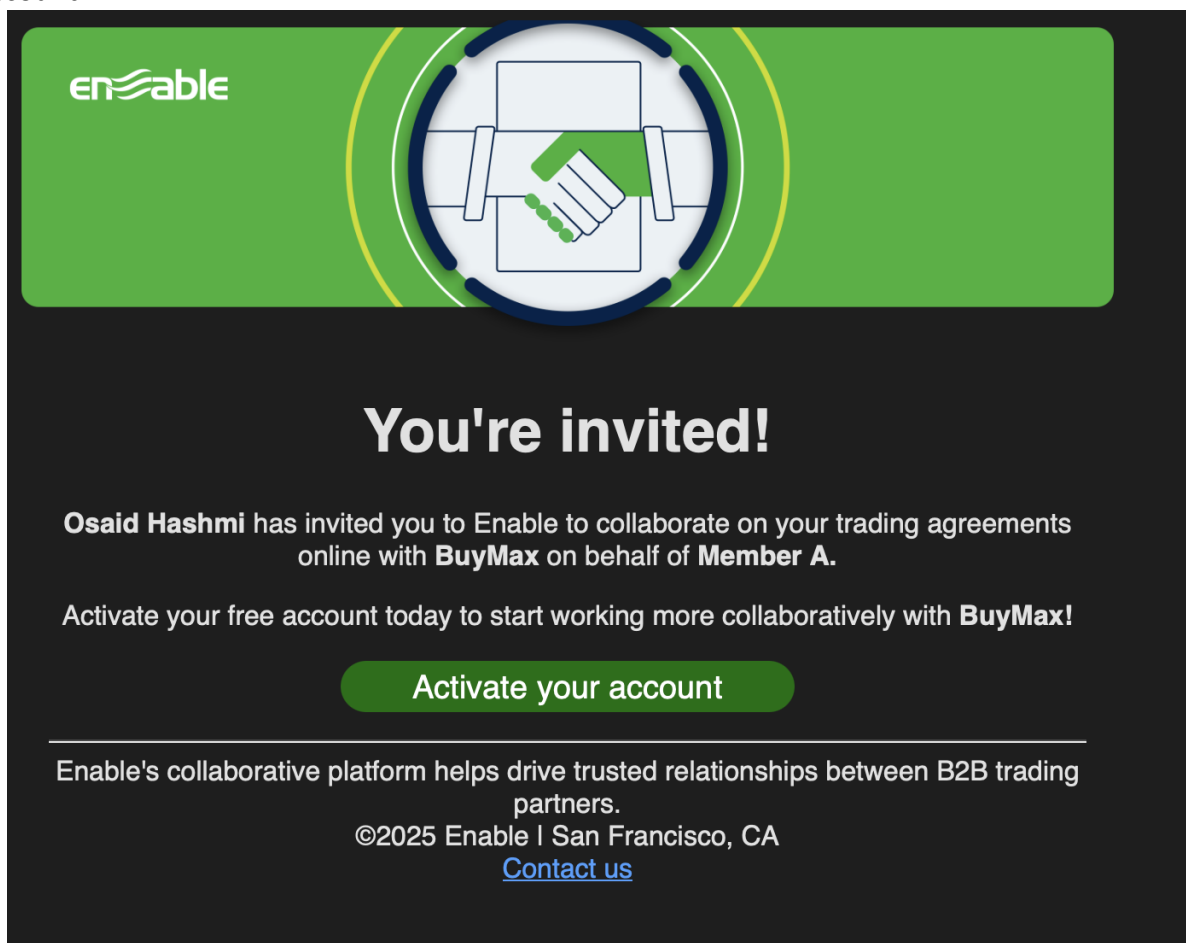
Setting-up Your Accounts with Enable

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.

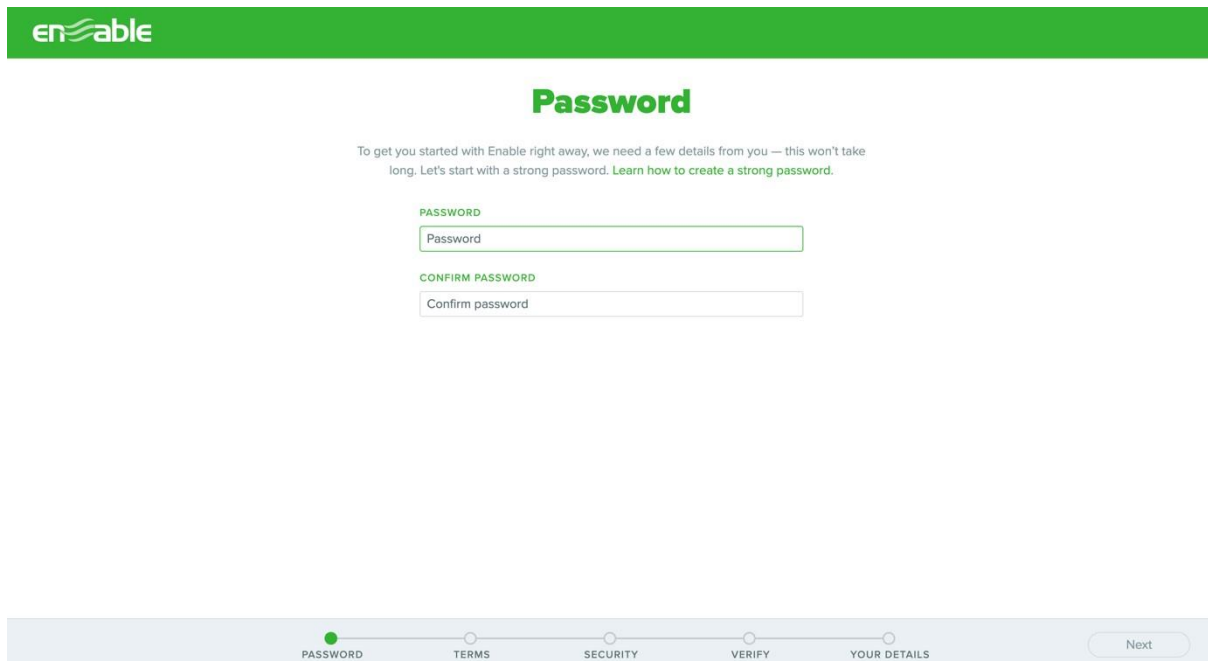
The two guides below will walk through uploading each account. The process will be extremely similar for both. The key difference will be **different emails for each account**. The **Member Dashboard** environment will leverage your regular e-mail (i.e. user@address.com). The **Member Uploads** environment 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.



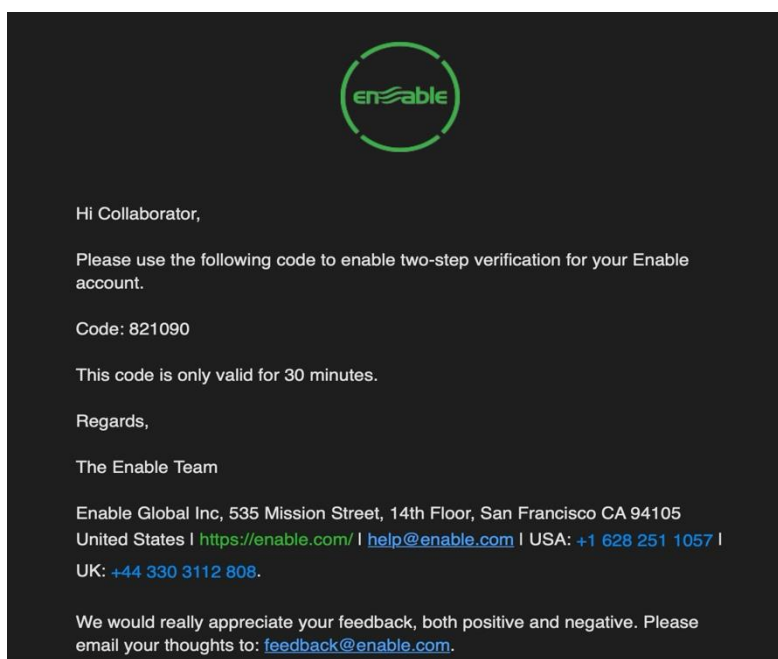
You will be taken to a webpage where you will be asked to set-up a password for your **Member Dashboard** account, enter your chosen password and select 'Next' at the bottom right of the screen to continue.



The screenshot shows the 'Password' setup page for an Enable account. At the top is a green header with the 'enable' logo. Below it, the title 'Password' is centered in green. A sub-header explains that details are needed to get started. There are two input fields: 'PASSWORD' and 'CONFIRM PASSWORD', both with placeholder text. At the bottom, a progress bar shows five steps: PASSWORD (active), TERMS, SECURITY, VERIFY, and YOUR DETAILS. A 'Next' button is located at the end of the progress bar.

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.



Verify

Thank you — let's try this out. We have sent you an email containing your code — this is what will happen each time you log in. Please enter the code here:

[I didn't receive a code](#)

CODE

[Back](#)

PASSWORDTERMSSECURITYVERIFYYOUR DETAILS

[Next](#)

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).

enable

Your details

Great, this is the last step. Please tell us a little about yourself, so that we can give you the best Enable experience.

FIRST NAME

Collaborator

LAST NAME

Write here

PHONE NUMBER

+31

COMPANY

Optional

JOB TITLE

Optional

PASSWORD

TERMS

SECURITY

VERIFY

YOUR DETAILS

Next

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.

Collaborator

Activity log

Create a deal

Your partners

BuyMax

Great news! BuyMax has invited you to start collaborating on behalf of Member A.

Accepting will allow them to view your profile.

Accept

Decline

Links

Just now - Collaborator

Great news! BuyMax has invited you to start collaborating on behalf of Member A.

ACTIVITY LOG

CREATE YOUR OWN DEALS

COLLEAGUE INVITE

Enable delivers positive ROI, unlocking millions in operational savings

Enable Transforming the customer journey

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.

Good afternoon

Welcome to Enable! From here you can access all of your Enable applications, manage your account or get in touch with us.

Organizations
View your organization and the organizations you work with.
View your organization

Collaborator
Work together on your trading programs with ease.
Review invitations

Claims
View claims between you and your trading partners.
Manage your claims

Ready for powerful new analytics tools? See what's new.

Account Messages Support

enable Collaborator Activity log Create a deal

Let's collaborate

Collaborator allows you to view and interact with your trading programs, showing information from many sources in one place. When you are invited to collaborate we will show your invites here.

Looking for an introduction before you start collaborating? Check out our [Collaborator quick start guide](#).

NEED A HAND?

If you need some help with using the Collaborator app, then you can [arrange an online appointment with Enable's support team](#).

LIKE WHAT YOU SEE?

You can [arrange a demo with a product expert](#) to find out how your organization could use Enable to manage B2B deals more effectively.

Your partners

BuyMax
2 recent imports

Links

ACTIVITY LOG CREATE YOUR OWN DEALS
COLLEAGUE INVITE

Give feedback, get rewarded! Take our quick 3 minute survey about our Collaborator Experience →

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.

enable

Collaborator
BuyMax
Activity log
Create a deal

BuyMax

Displayed below are the options available to you for tracking your activities.

Partner Dashboard
Track the progress of your agreements and identify potential rebate opportunities

Track progress

Activity
Keep track of all your activities

View activity logs

Claims
View claims between you and your trading partner

Sign off your claims

enable

Collaborator
BuyMax
Partner Dashboard
Activity log
Create a deal

Vendor purchases - Member A [View](#)

Partner Dashboard

Partner Dashboard lets you see the real-time progress of program lines to their next bands, as well as showing rebate opportunities. Use Partner Dashboard to see where you could unlock more rebates.

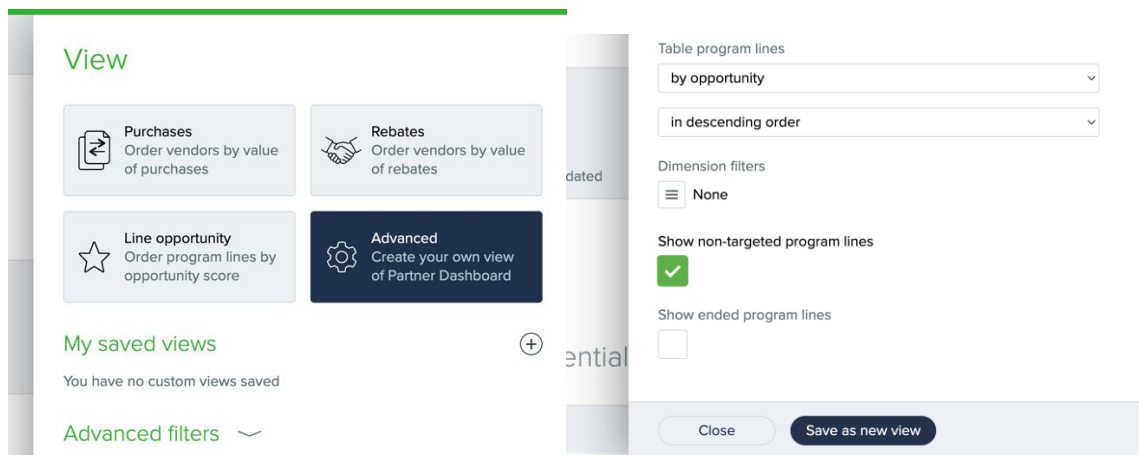
Take a tour
Let us show you around

60 days ago
Most recent purchase

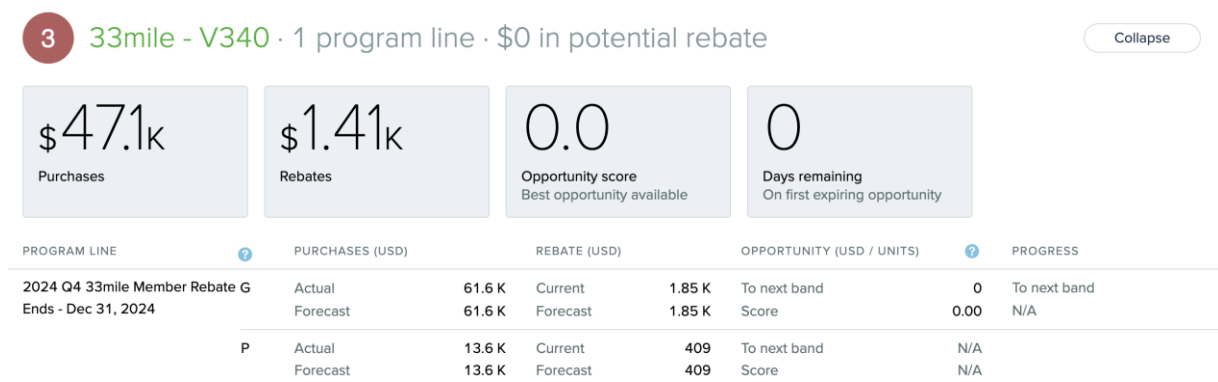
13 minutes ago
Information last updated

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

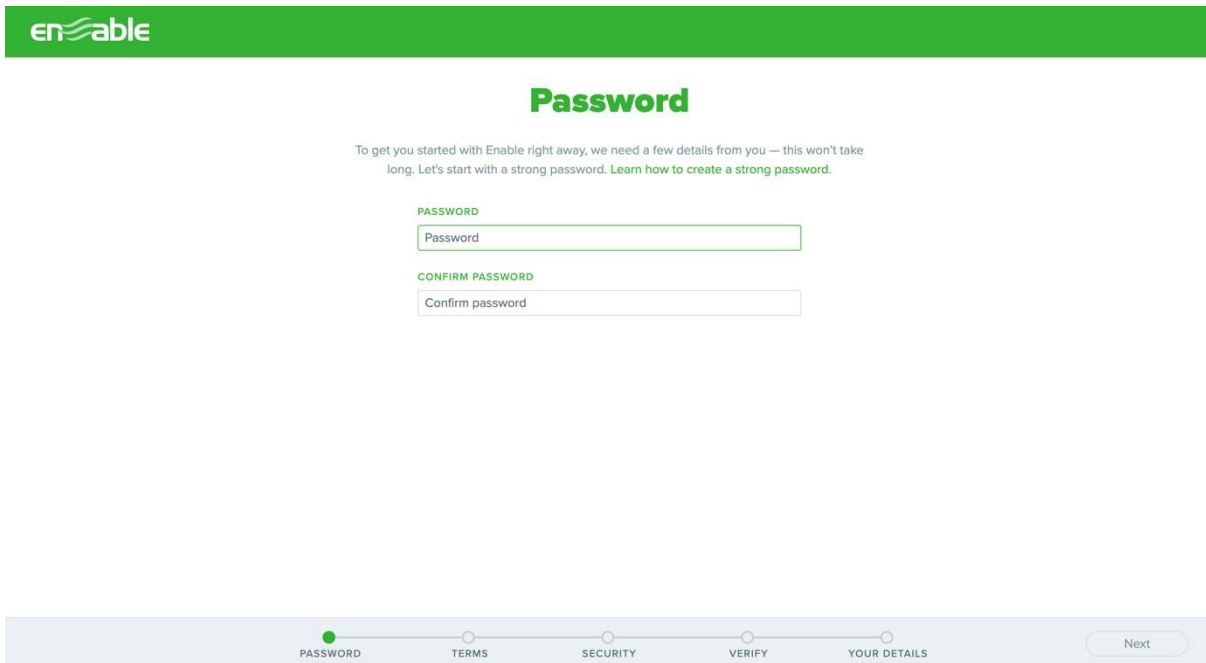
NOTE: You must be logged out of your Member Dashboard Account to activate your Member Uploads Account. The log-out option can be found using the 9-dot option tile in the top-right of the screen.



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 be 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.

The screenshot shows the 'enable' logo in a green bar at the top. Below it, the word 'Password' is centered in green. A message states: 'To get you started with Enable right away, we need a few details from you — this won't take long. Let's start with a strong password. [Learn how to create a strong password.](#)' There are two input fields: 'PASSWORD' with a placeholder 'Password' and 'CONFIRM PASSWORD' with a placeholder 'Confirm password'. At the bottom, a progress bar shows five steps: 'PASSWORD' (active with a green dot), 'TERMS', 'SECURITY', 'VERIFY', and 'YOUR DETAILS'. A 'Next' button is on the right.

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).

enable

Your details

Great, this is the last step. Please tell us a little about yourself, so that we can give you the best Enable experience.

FIRST NAME

Collaborator

LAST NAME

Write here

PHONE NUMBER

+31

COMPANY

Optional

JOB TITLE

Optional

PASSWORD

TERMS

SECURITY

VERIFY

YOUR DETAILS

Next

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.

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Great news! BuyMax has invited you to start collaborating on behalf of Member A.

ACTIVITY LOG

CREATE YOUR OWN DEALS

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Enable Transforming the customer journey

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

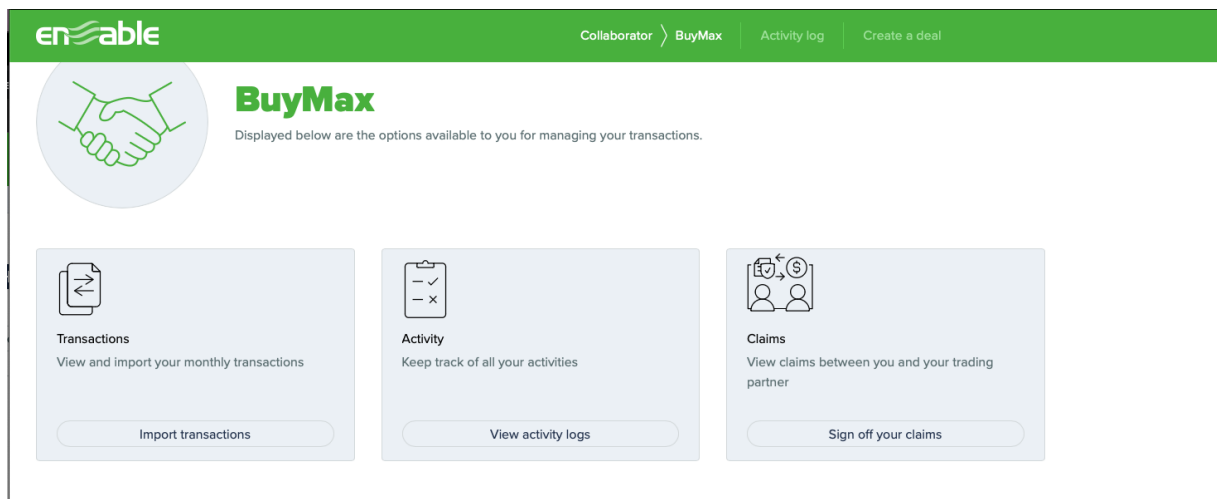
Importing Self-Reported Spend

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.

The screenshot displays the Enable Collaborator platform interface. At the top is a green header with the 'enable' logo and a 9-dot menu icon. Below the header, a 'Good afternoon' greeting is followed by a welcome message: 'Welcome to Enable! From here you can access all of your Enable applications, manage your account or get in touch with us.' The main content area features several tiles: 'Organizations' (with a bar chart icon and a 'View your organization' button), 'Collaborator' (with a handshake icon and a 'Review invitations' button), 'Claims' (with a document and dollar sign icon and a 'Manage your claims' button), and a large analytics dashboard tile titled 'Ready for powerful new analytics tools? See what's new.' To the right of these tiles are three icons: a padlock for 'Account', an envelope for 'Messages', and a question mark for 'Support'. Below this is a secondary green header with the 'enable' logo and navigation links for 'Collaborator', 'Activity log', and 'Create a deal'. The main content area is divided into three sections: 'Let's collaborate' (with text about collaborating and a 'NEED A HAND?' section), 'Your partners' (featuring a 'BuyMax' tile with '2 recent imports' and the BuyMax logo), and 'Links' (with tiles for 'ACTIVITY LOG', 'CREATE YOUR OWN DEALS', and 'COLLEAGUE INVITE'). At the bottom right, there is a feedback survey tile titled 'Give feedback, get rewarded! Take our quick 3 minute survey about our Collaborator Experience' with a 5-star rating icon and an arrow pointing to the survey.

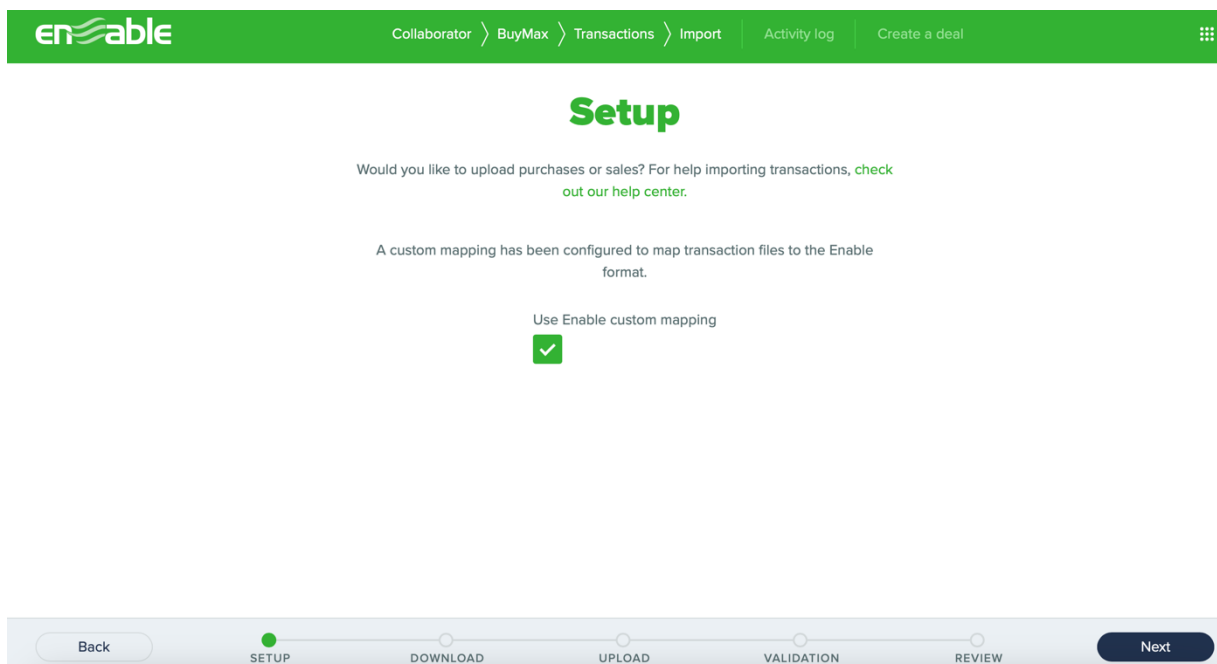
After clicking the 'BuyMax' tile, click on the 'Transactions' tile on the Collaborator landing page.



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

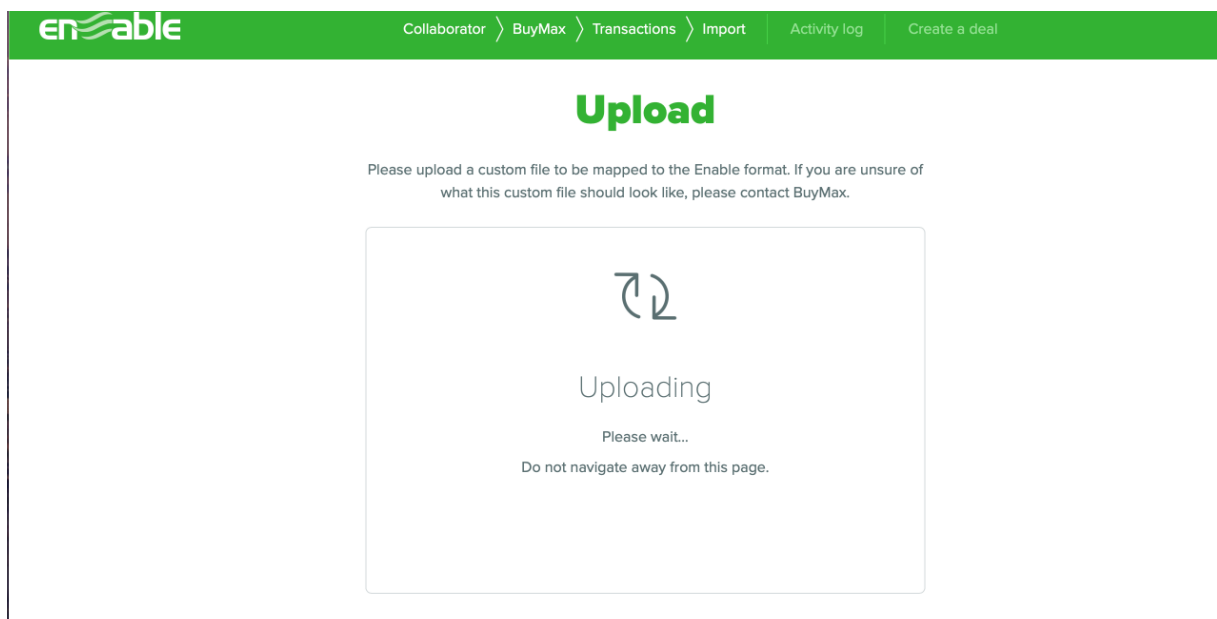
Download the template here: <https://insights.enable.com/collaborator-buy-max>

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.

Validation

Great! We can import this file. See the summary below of the file contents. This summary is explained in our help center article, [validation of data](#).

FILENAME BuyMax Members - Reporting Spend Template.csv	
VALUE 18,000.00 USD	TRANSACTIONS 3
UNRECOGNIZED REFERENCES 0	TRANSACTIONS FOR Feb 28, 2025



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’*.

Review

This import will need to be approved by BuyMax. Once approved, this data will be used for BuyMax’s rebate calculations. Please confirm these details are correct. Visit our help center to see how to [review and confirm your data](#).

We will submit the import for approval

IMPORTING TRANSACTIONS TO BuyMax	ON BEHALF OF * Member Vendor A
WITH CURRENCY USD	REMOVING EXISTING TRANSACTIONS No

Using transactions in the file

FILENAME

BuyMax Members - Reporting Spend Template.csv

VALUE

TRANSACTIONS

●

●

●

●

●

SETUP

DOWNLOAD

UPLOAD

VALIDATION

REVIEW

Submit

Submitted for approval

Your transactions will be imported into the system once approved by BuyMax.



You will be notified once your submission has been approved or rejected.

You can view a history of your imports on the transaction logs page.

[View transactions](#)

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

The screenshot shows the EnSable Transactions page. The header includes navigation links: Collaborator > Timber and Building Supplies... > Transactions, Activity log, and Create a deal. The main section is titled 'Transactions' and includes an 'Import transactions' button. Below this, a table lists transaction data for December, November, and October 2023. The October entry shows a value of 1,500,000.00 EUR and 45 transactions. A 'Show more months' button is at the bottom of the table. To the right, a notifications panel shows two messages from 'Trading Programs' regarding transaction imports and reconciliation issues, with a red box highlighting the first message.

Month	Value	Transactions
2023 December	No transactions for this month	
2023 November	No transactions for this month	
2023 October	1,500,000.00 EUR	45

Notifications:

- 2 minutes ago - Trading Programs: The transactions for Timber and Building Supplies Holland in your file Turnover-[0-9] (14)-20231221090705.csv have been imported. Some of your data couldn't be reconciled – you can download this data when viewing monthly transactions.
- 4 minutes ago - Trading Programs: The transactions for Timber and Building Supplies Holland in your file Turnover-[0-9] (14)-20231221090303.csv have been imported. Some of your data couldn't be reconciled – you can download this data when viewing monthly transactions.

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:

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	TRANSACTION	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 our collaborator help-center:

[Collaborator help-center homepage](#)

[Getting started with Collaborator](#)

[Importing transactions](#)