Getting Started on PartBridge.com: Direct Materials

PartBridge is a web-based application that allows businesses to buy and sell direct materials and capital and expensed equipment in an auction format.

This help file is intended for people who use PartBridge.com to buy and sell direct materials (components, parts and materials that are used to assemble your company's products).

For information related to buying and selling capital and expensed equipment, please see the other help file for Capital and Expensed Equipment Users.

For a brief overview of the buying and selling processes on PartBridge.com, see Buying and Selling Direct Materials: An Overview.

Buying and Selling Direct Materials: An Overview

PartBridge.com allows users to buy and sell two categories of materials, direct materials (components, parts and materials that are used to assemble your company's products) and capital and expensed equipment (for example, furniture and factory equipment). The processes for buying and selling these two categories of materials are very similar.

To advertise direct materials for sale, a PartBridge user uploads ("posts") a text file with specific information about each item. Similarly, potential buyers post information about materials they would like to buy.

When a match is found between a posted excess and a posted shortage, PartBridge displays the resulting match at the Buy Opportunities window.

Buyers and sellers of direct materials can also search for materials without posting a text file. Matches found between sellers' searches and buyers' postings result in Sell Opportunities, whereas matches found between buyers' searches and sellers' postings result in Buy Opportunities.

A transaction is opened when the buyer or seller submits an offer or an order to the other party.

While a transaction is open, both the buyer and the seller have several opportunities to cancel the transaction.

Flowcharts of the buying and selling process for direct materials [http://www.partbridge.com/dmflow.asp?] and capital and expensed equipment [http://www.partbridge.com/ceeflow.asp?] are available on the PartBridge website.

For detailed information about how to buy and sell direct materials on PartBridge.com, see these sections:

- Buying and Selling Direct Materials: Getting Started
- Business Rules and Relationships (Direct Materials Only)
- Selling Direct Materials on PartBridge.com
- Buying Direct Materials on PartBridge.com

Business Rules and Relationships (Direct Materials Only)

Companies that buy and sell direct materials on PartBridge.com have the ability to set up a system of business rules and relationships for direct materials transactions. These rules and relationships involve different categories of companies with which your company does business and varying terms that these companies receive in buying and selling transactions.

You will be able to tell whether your company has set up business rules and relationships during your initial registration process. If your company has set up business rules and relationships, step 6 of the registration process gives you the opportunity to identify specific individuals within other companies as "included participants." If your company has not set up business rules and relationships, you will not see this step in your registration process.

The following sections have more information about business rules and relationships:

- Designating your Included Participants
- Specifying Business Rules

Examples of how business rules and relationships can be configured:

- 3 Tier Configuration: Tier 1 -- Company Internal, Tier 2 -- Contract Manufacturers, Tier 3 -- Exclusive Brokers

3 Tiers: Internal, Contract Manufacturers, and Exclusive Brokers

Some companies set up three categories of companies with which you can buy and sell direct materials: Company Internal (Tier 1), Contract Manufacturers and other Tier 2 companies, and Exclusive Brokers and other Tier 3 companies.

- Company Internal (Tier 1) companies are internal groups or entities within your company that buy and sell materials from each other. They are not offered a discount from the standard cost.
- Contract Manufacturers and other Tier 2 companies are those companies to which your company offers a small discount from the standard cost when selling direct materials.
- Exclusive Brokers and other Tier 3 companies are offered a greater discount than Tier 2 companies.

Designating Your Included Participants

Within each of these categories, PartBridge allows you to define one or more individual users from each company. These people, called Included Participants, receive e-mail notification about possible buy and/or sell opportunities as a result of your postings and searches. You may select none, some, or all of the users from a given company to be Included Participants.

You can designate Included Participants for none, some or all of the companies in each category.

The business relationships described above are reflected in step 6 of the registration process for direct materials users. Part of the screen for step 6 is shown below:

Keep these points in mind when setting up your business relationships:

- The Available Users box lists all registered users associated with the company shown in the Company field.
- You move the people with whom you want to work from the Available Users list to the Included Participants list.
- An Included Participant on your list receives e-mail notification when a match occurs between his or her postings or searches and your postings or searches.
- It is OK to leave an Included Participants list blank.

Specifying Business Rules

When you upload a text delimited file describing your excess materials, you must enter a value in the business_rules field. An entry in that field might look like this:

0,10,30

These business rules mean that the Tier 1 companies receive a 0% discount, the Tier 2 companies receive a 10% discount, and the Tier 3 companies receive a 30% discount.

The program's administrator can define the default duration of each discount. So, for example, if the default duration is 30 calendar days for each tier, the Tier 1 discount of 0% lasts for 30 days, then the Tier 2 companies are offered the material at a 10% discount for 30 days, and finally, the Tier 3 companies are offered the materials at a 30% discount for 30 days. Your program administrator will give you more information about the discounts and their duration.

To introduce a different duration for each discount, you can enter the business rules in the text file so that the discount is followed by a hyphen and then a number of calendar days. For example,

0-20,10-30,50-45

This set of numbers indicates that the 0% discount will be in effect for 20 days, the 10% discount will be in effect for 30 days, and the 50% discount will be available for 45 days.

For detailed information about how to buy and sell direct materials on PartBridge.com, see these sections:

- Buying and Selling Direct Materials: Getting Started
- Selling Direct Materials on PartBridge.com
- Buying Direct Materials on PartBridge.com

Buying and Selling Direct Materials: Getting Started

Getting started as a buyer or seller of direct materials involves the following:

- Registering As a New Direct Materials User
- Logging In As a Direct Materials User
- Reviewing Messages in the Message Center
- Learning about PartBridge.com E-mail Messages

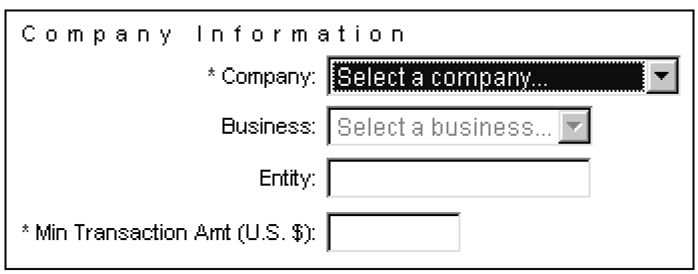
Registering As a New Direct Materials User

To register as a direct materials user, click the Register for Direct Materials button.

Note: To buy and / or sell capital *and* expensed equipment and direct materials, you must register separately for each kind of material.

Clicking the Register for Direct Materials button brings you to the first profile page.

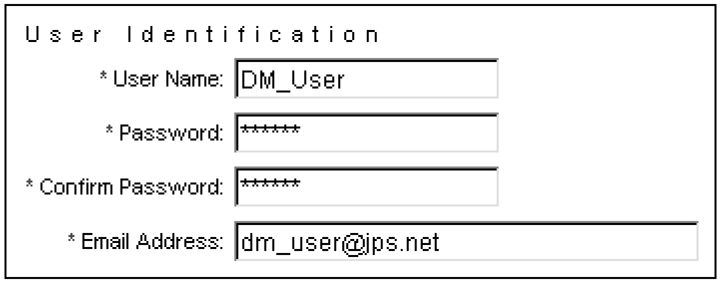
1. At the first profile page, select your company from the drop-down list.



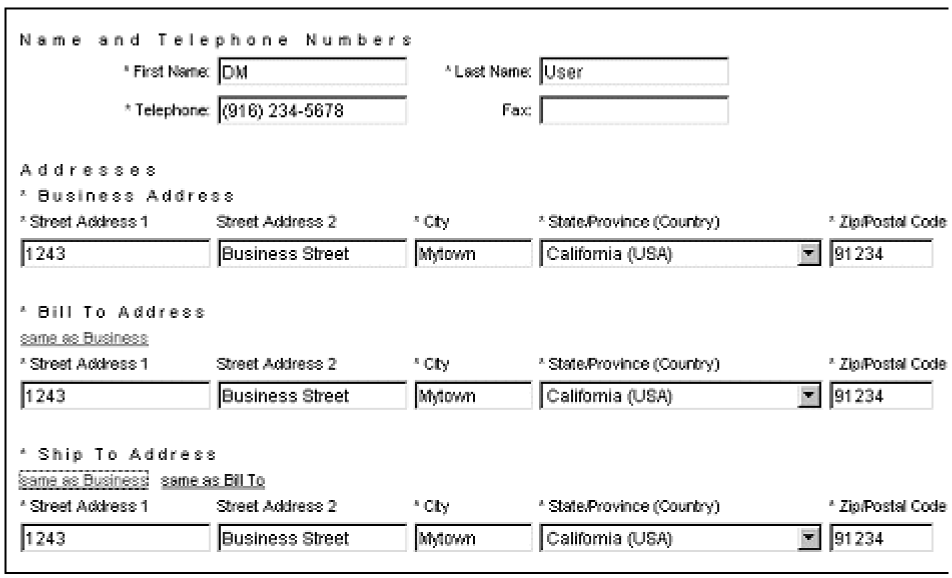
2. After the screen refreshes, enter a business and entity, if appropriate. Neither Business nor Entity are required.
3. Enter a Minimum Transaction Amount in U.S. dollars. The minimum transaction amount primarily concerns sellers. It is the dollar amount per line item that makes a transaction “worthwhile”. For example, your company may decide that a buyer’s offer must equal at least $100 per line item to make the sale cost-effective.
4. Click the Next Step button.
5. Enter your User Name, which must be different from everyone else's PartBridge.com user name. Use letters, numbers and/or underscores only.

   Note: If you will be buying or selling both direct materials and capital and expensed equipment, your user name and password for your direct materials profile must be different from your user name and password for your capital and expensed equipment profile.

6. Enter a password consisting of letters, numbers and/or underscores only.
7. Confirm your password by typing it again exactly as you did in the previous step.
8. Enter your company e-mail address, such as your_name@company.com.

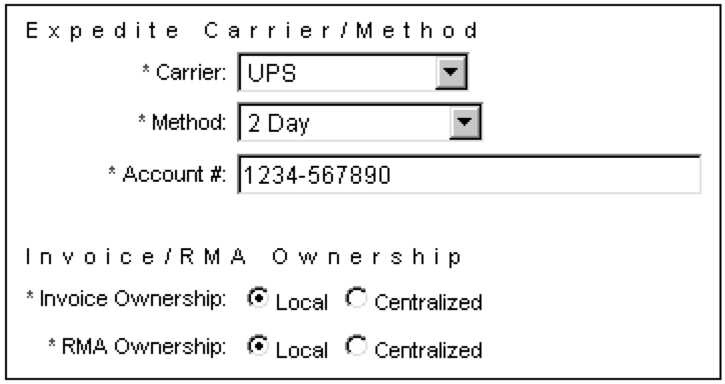


9. Click the Next Step button.
10. Enter your name, telephone numbers and addresses.

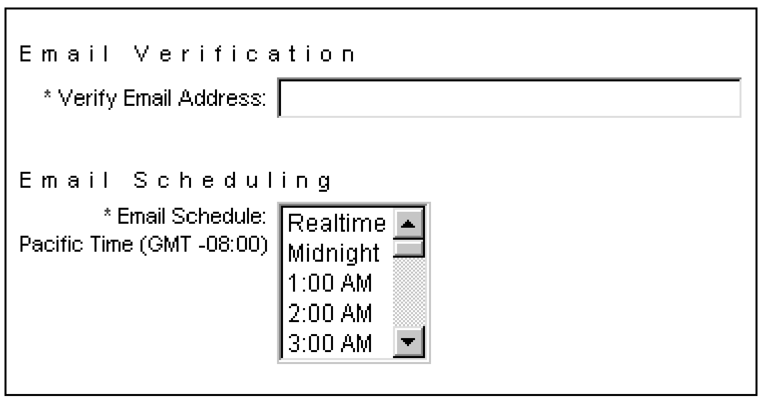


11. Click the Next Step button.
12. Indicate the carrier and method you will use when you need to expedite the shipment of materials you purchase. Also enter your account number with this carrier.
13. For Invoice Ownership, indicate whether invoices are handled locally at your office or centrally at another business location.

14. For RMA Ownership, indicate whether RMA's (Return Material Authorizations) are handled locally at your office or centrally at another business location.



15. Click the Next Step button.
16. Enter your e-mail address again.
17. Select how often you would like to receive e-mail notices and reminders about PartBridge transactions.



Selecting “Realtime” causes PartBridge to send you a message, such as a request for action or a reminder, as soon as the tool generates the message. Otherwise, your messages will arrive in a daily batch at the time you select.

18. At this point, some PartBridge users are finished registering, and others have one more step to go.
    a. If you see a button or link that says **Next Step**, go to the next step.
    b. If you see a button or link that says **Done -- Register Me!**, click here.
19. Complete the Business Rules page:

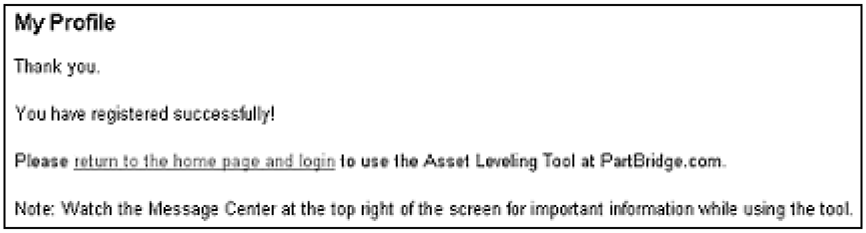
c. Notice the kinds of relationships defined on this page. For more information, see Business Rules and Relationships (Direct Materials Only).

d. For each company in each type of relationship, double-click the names of available users with whom you wish to work on PartBridge transactions. Their names move to the Included Participants lists. To move all the names from one list to the other, click **All-->** or **<--All**.

e. Keep the following points in mind as you select your Included Participants:

- Your Included Participants receive notice when PartBridge.com finds matches between both of your postings and searches.
- Once a company has been selected under Contract Manufacturers, it is no longer listed under Exclusive Brokers, and vice-versa.
- You can designate Included Participants for as many or as few of the companies in each category as you wish.
- You can select any number of Included Participants from each company.
- It is OK to leave a list blank.

20. When you've selected all the desired Participants, click Done - Register Me!
21. At the Registration Confirmation window, you can click the link to return to the PartBridge home page.



22. Check your e-mail for a confirmation message containing your user name and password.

Also of interest:

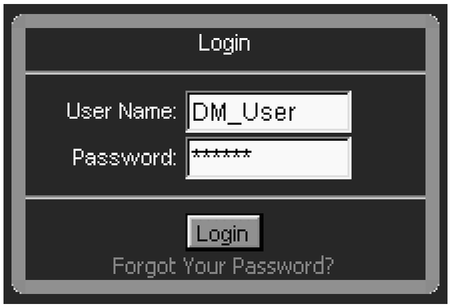
- Logging In As a Direct Materials User
- Updating Your Personal Profile
- Reviewing Messages in the Message Center
- Learning about PartBridge.com E-mail Messages

Logging In As a Direct Materials User

To log in to PartBridge.com, open your browser and navigate to this URL:

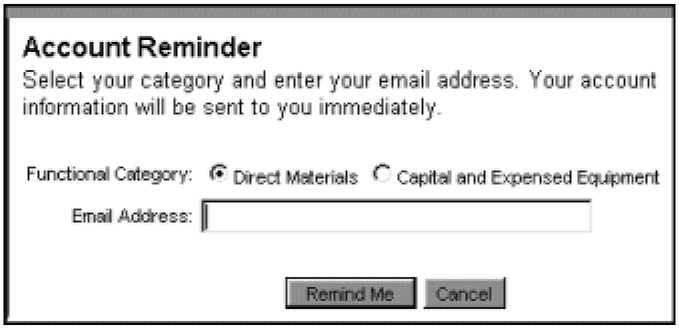
http://www.partbridge.com/

1. In the Login box, enter your user name and password.
2. Click Login.



NOTE: If you have registered as both a direct materials user and a capital and expensed equipment user, be sure to log in with your direct materials user name and password.

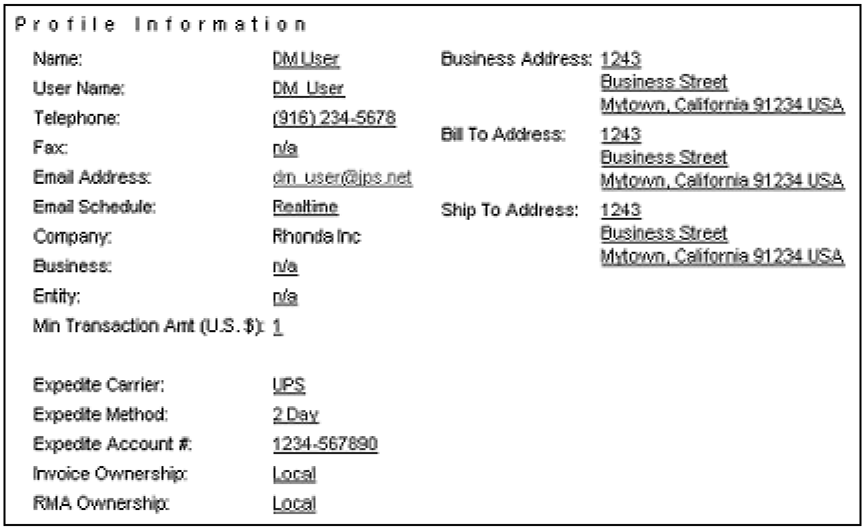
If you forget your password, click the **Forgot Your Password?** link. The Account Reminder window opens, where you can request PartBridge.com to send your account access information to you.



Updating Your Personal Profile

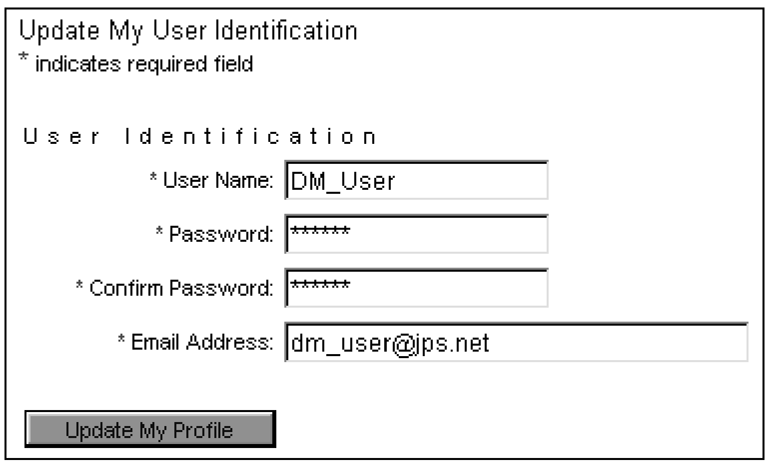
1. At the PartBridge.com home page, log in with your user name and password.

2. Click “My Profile.” PartBridge.com displays your profile information.



3. All the information that can be edited appears as hyperlinks (blue and underlined.) To change an item, click it. PartBridge takes you to the step in the registration process where you last entered the information.

   For example, if you click your user name on the My Profile page, you go to the User Identification step:



4. Enter the new information in the appropriate field, then click the Update My Profile button. You return to the My Profile window.

Reviewing Messages in the Message Center

The Message Center is a prominent feature of the PartBridge tool.

Whenever you login to PartBridge.com, you should look at the Message Center in the upper right-hand corner of the home page first. It will tell you about any system issues or updates, and, most importantly, it will display information about your postings, opportunities and transactions.

Statements about postings, opportunities and transactions in the Message Center are hyperlinks. Clicking on a statement will take you to the appropriate window.

Example: When you click on the statement about Shortage (Buy) Postings, the Postings [My Shortages] window opens.

Postings, opportunities and transactions are listed as “new” until you view them in their respective windows.

Example: When you login to PartBridge.com at the start of a business day, the Message Center states that you have 5 Excess (Sell) Postings (2 new). After viewing your new postings in the Postings [My Excess] window, the Message Center indicates that you have 5 Excess (Sell) Postings (0 new).

Opportunities and transaction activities remain visible in the Message Center until the transaction is completed, canceled or closed. Therefore, sometimes it might seem that the Message Center is not keeping pace with your activities in a given transaction. In this way, however, the Message Center makes it easier for you to see the details of all the actions taken in a transaction.

Example: When you first log in, the Message Center says you have 2 POs Pending (2 new). After going to the POs Pending window, you submit PO numbers for both line items. The POs Pending screen refreshes, and the Message Center now says you have 2 POs Pending (0 new). The POs you already submitted remain visible at the POs Pending screen until the Seller closes the transaction by entering a waybill number (or cancels it at the Waybill Pending window).

The Message Center works together with PartBridge e-mail messages to keep you informed of the status of your postings, opportunities and activities.

Example: Whenever you post new excesses or shortages, this fact is reflected in the Message Center and you also receive an e-mail stating that you have new postings.

You can view more detailed messages by clicking the Message Center link near the top of the PartBridge.com home page. Here, you are able to view more information about each new activity.

Related topic: Learning about PartBridge.com E-mail Messages.

Learning about PartBridge.com E-mail Messages

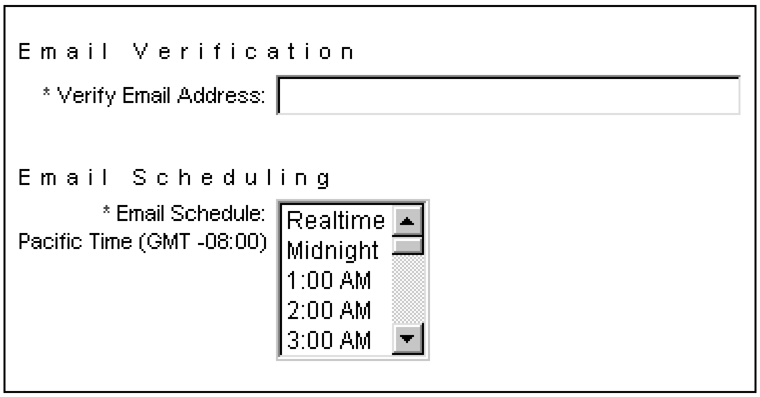
As a PartBridge.com user, you receive e-mail messages whenever there has been new activity that affects your postings, opportunities, or open transactions.

For more information about PartBridge.com e-mail, see these topics:

- Setting Up Your E-mail Schedule
- What To Do When You Receive E-mail from PartBridge.com

Setting Up Your E-mail Schedule

Initially, you set up a schedule for receiving e-mail in step 5 of the registration process for direct materials users.



Selecting “Realtime” causes PartBridge to send you messages as soon as they are generated. Otherwise, your messages arrive in a daily batch at the time you select.

You can always change your e-mail schedule:

1. After logging in, click My Profile.
2. Double-click your e-mail schedule as it appears in your profile.
3. Select a new time from the E-mail Scheduling drop-down list.
4. Click Update My Profile.

What To Do When You Receive E-mail from PartBridge.com

Some messages from the PartBridge tool are just for your information, such as registration confirmation messages and messages confirming your new postings.

Most messages, however, require you to take some sort of action.

PartBridge e-mail messages and the actions they require are summarized in the following tables:

- E-mail Messages to Direct Materials Sellers
- E-mail Messages to Direct Materials Buyers

E-mail Messages to Direct Materials Sellers

Your e-mail says...	You received this message because...	You should take this action...
You have new Excess (Sell) Postings	Excess items have been posted.	Review your postings at the Postings [My Excess] window.
You have new Sell Opportunities.	A seller's search resulted in a match.	Go to the Sell Opportunities window.
You have new Sell Approvals Pending.	A buyer's postings or search resulted in a match and the buyer has made an offer to the seller.	Go to the Sell Approvals Pending window, approve or decline the offer.
You have new Waybills Pending.	A buyer submitted a PO number for a transaction.	Enter the waybill number at the Waybills Pending window; if expedited, use Buyer's carrier and account.
A transaction was shipped and closed.	A seller submitted a waybill number for a transaction.	Do nothing. [???]
An offer was declined.	A potential buyer declined the terms offered by a seller.	(1) Do nothing, or (2) Return to the Sell Opportunities window and make a new offer.
A transaction was canceled.	A buyer canceled the transaction.	Do nothing.
A transaction closed.	A buyer failed to act on the transaction within the prescribed number of days.	Do nothing.

E-mail Messages to Direct Materials Buyers

Your e-mail says...	You received this message because...	You should take this action...
You have new Shortage (Buy) Postings.	Shortages have been posted.	Review your postings at the Postings [My Shortages] window.
You have new Buy Opportunities.	Matches were found between a seller's posted excess and a buyer's posted shortage, or a buyer's search resulted in a match.	Go to the Buy Opportunities window.
You have new Buy Approvals Pending.	A seller's search matched a buyer's posted shortage. The seller has submitted price and quantity terms to the buyer.	Go to the Buy Approvals Pending window, either Accept or Decline the seller's offered terms.
You have new POs Pending.	The seller approved the buyer's order.	Enter the PO number at the Purchase Orders Pending window.
An offer has been declined.	A seller declined the buyer's order.	(1) Do nothing, or (2) Submit another offer at the Buy Opportunities window.
A transaction has been canceled.	A seller canceled a transaction.	Do nothing.
A transaction closed.	A seller failed to act on a transaction within the prescribed number of days.	Do nothing..

[This section needs to change if e-mail gets more consolidated or eliminated; need examples of messages about daily reminders of expiring events.]

Posting Direct Materials Data

PartBridge users advertise the excess materials they would like to sell and/or the items they would like to buy by uploading tab-delimited text files to PartBridge.com.

The same text file can contain both materials in excess and materials in shortage, because the information you provide for each line item is exactly the same whether the material is in excess or shortage; the only difference is that the quantity for materials in excess is always a positive number and the quantity for materials in shortage is always a negative number.

Text files for direct materials and text files for capital and expensed equipment have different formats. Be sure to use the appropriate format for the materials you are advertising to buy and/or sell.

See:

- Creating a Text File for Direct Materials
- Uploading Direct Materials Data

Creating a Text File for Direct Materials

PartBridge users advertise direct materials to buy and/or sell in a tab-delimited text file with the proper columns and information. (A tab-delimited text file is a file with the extension **txt** that has tabs separating each of the data elements.) The file must contain the following columns in the order presented here:

Column Heading	Req'd?	Description
email_address	Yes	The email address of the individual responsible for making buy/sell decisions for the corresponding part number. Example: rhonda_robins@rlrbroker.com
qty	Yes	The quantity of the part (integer only, no decimals or fractions); a negative number indicates a shortage, a positive number indicates an excess. Example: 100
standard_cost	Yes	Your standard cost for the part. Example: 5.037
description	Yes	A description of the part. Example: film capacitor
internal_part_no	No*	Your company's internal part number (required if manufacturer's part number unavailable). Example: 0160-4932

mpn	No*	The manufacturer's part number (required if internal part number unavailable). Example: PME271Y410M
mfr	No	The part manufacturer. Example: Fox Electronics
buyer_controller_no	No	Buyer controller number for the part. Example: 40
date_code	No	The date code. Example: 0121
pkg	No	Packaging details. Example: tube
business_rules	Depends	Business rules / relationships; required if your company is has business rules and the quantity is excess. Example: 0,10,30

** You must provide at least one of the following:* internal_part_no *or* mpn. *You may provide both.*

To create a tab-delimited text file in Microsoft Excel for uploading to PartBridge, follow these steps:

1. Set up an Excel spreadsheet with the proper column headings. The first row (or record) must contain all the column headings.

   Note: An Excel template for direct materials is available from PartBridge's Upload page.
2. Select File > Save As, provide a name for the file, and choose Text(Tab Delimited)(*.txt) from the pull-down list.
3. If you see a box that says, "The selected file type does not support workbooks that contain multiple sheets...," click OK.
4. If you see a box that says your file may contain features that are not compatible with Text (Tab Delimited), click Yes.
5. Enter data in all the columns for which there is a value. If a field is not required and there is no value, leave the column blank for that row.
6. Save and close the file.

You can also create a tab-delimited text file from a Microsoft Access database:

1. Using Access functionality, arrange your data as defined above in a single Table. Field names and order should exactly match the definitions above. Each row in the table is an individual record.

   Note: An Access template for direct materials is available from PartBridge's Upload page.
2. Select File --> Export --> To an External File or Database.
3. Choose Save as Type --> Text Files.
4. Choose Delimited, then click Next.
5. Choose Tab.

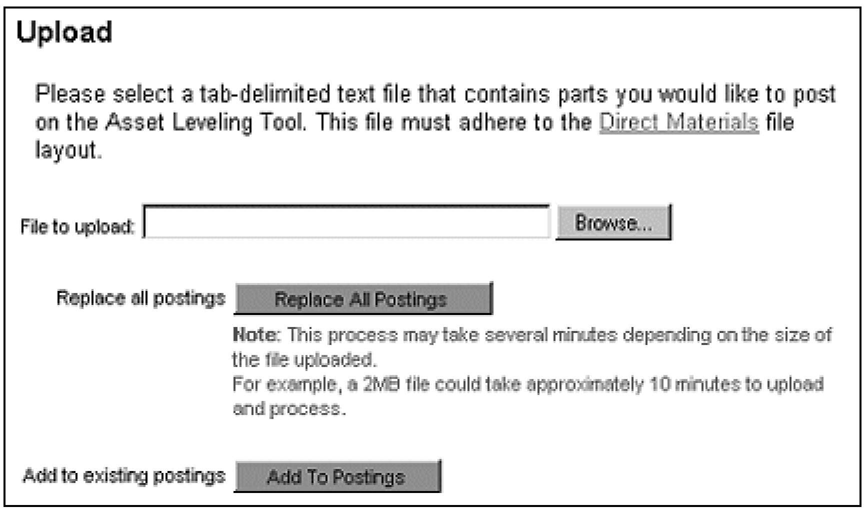
6. Check Include Field Names on First Row, select {none} for Text Qualifier, then click Next.
7. Select Export to File, then click Finish.

[Reviewers: please verify these instructions for Excel and Access.]

Uploading Direct Materials Data

When uploading new part data, you can replace (or "refresh") the existing posting, or you can leave the existing posting the way it is and add more items to it.

You can reach the Upload page by clicking the Upload button on the PartBridge home page.



1. Determine whether your new file will replace the existing file or simply add to it.
2. Click the Browse button on the Upload page to locate the file you want to upload.
3. Navigate to the correct folder on your local drive and select the appropriate file in the Choose File box.
4. After selecting the file to upload, you have two choices:
   - If you want to replace the previous file with this new file, click the Replace All Postings button, then click OK in the "Are you sure...?" box. Many users like to think of this process as "refreshing all the postings."
   - Click the Add to Postings button if you want to keep the existing list and add more items to it.

After the file upload is complete, the Message Center updates its number of new postings and the owner(s) of the parts or shortages receive e-mail messages.

To view all current postings, click the Postings lines in the Message Center or navigate to the Postings screens using the Buy menu and Sell menu on the left-hand side of the PartBridge.com home page.

Selling Direct Materials on PartBridge.com

Selling direct materials on PartBridge.com involves the following activities:

- Logging in to PartBridge.com with your direct materials user name and password
- Deciding to post or search
- Viewing, editing and appending existing postings
- Viewing selling opportunities
- Viewing transactions pending seller approval
- Providing waybill (bill of lading) numbers for open transactions
- Searching for selling opportunities (without posting)
- Canceling or closing transactions

Selling Direct Materials: Posting vs. Searching

As a user of PartBridge.com, you can advertise the material you have to sell. A seller that currently has posted files is called an Active Participant. Active Participants post materials for sale and wait for PartBridge.com to find matches to buyers' postings and searches. Active Participants are not permitted to search for Sell Opportunities.

Conversely, a seller that currently has no posted files is called a Passive Participant. Passive Participants use the search functions of PartBridge.com to search buyers' postings for Sell Opportunities. An Active Participant returns to passive status whenever that participant has no current postings.

For information on how to create and upload files, see Posting Direct Materials Data .

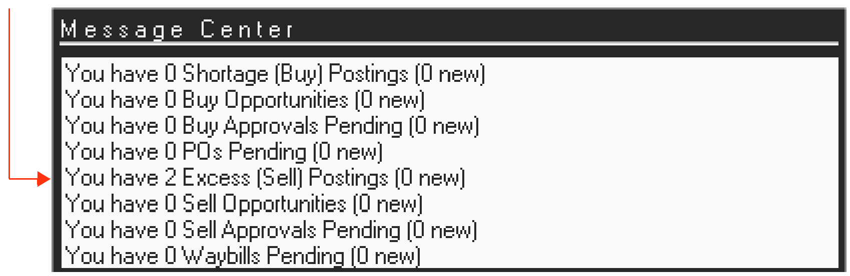
For information on searching for Sell Opportunities, see Searching for Sell Opportunities (Without Posting).

Viewing and Editing Existing Postings

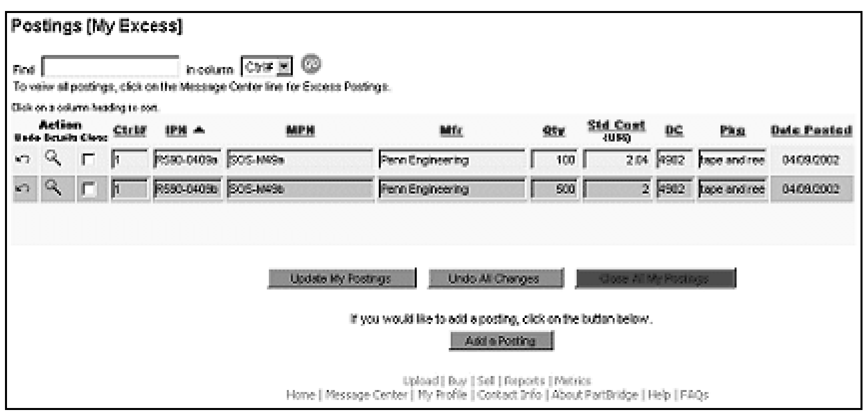
To view your existing excess postings, log in with your user name and password, and then do one or the other of the following:

A. Select Postings -- My Excess from the Sell menu, or

B. Click the Excess (Sell) Postings line in the Message Center.



The Postings [My Excess] window lists all your postings of excess materials.



Searching for a Specific Line Item

To find a specific line item on the Postings screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.

  The window refreshes and displays only the results of your search. To view all your postings again, click the line about Excess Postings in the Message Center.

- To sort by column, click any column heading that looks like a hyperlink. Example: The IPN column can be sorted in descending or ascending order.

Working with Postings

You can take these actions with regard to each line item:

- Edit various fields: Most of the fields on the Postings window are editable. Click the field and replace the existing data with new data.

  Note: Once an offer has been submitted to buy or sell any portion of a posting, the posting can not be edited for the duration of the transaction (until the offer is declined or the transaction is closed or canceled.)
- Undo: Click the Undo button to return the line to the way it was before you started editing--if you have not yet clicked Update My Postings.
- Details: Click the Details button to open a new window with other information about the line item, such as Commodity Code, MPN, Other MPN, Mfr, Other Mfr, and Description. You can edit the fields in this window. To save your changes, click Update My Posting. When you see the confirmation message, click Done to return to the Postings window.
- Close checkbox: Click the Close checkbox to close the item.

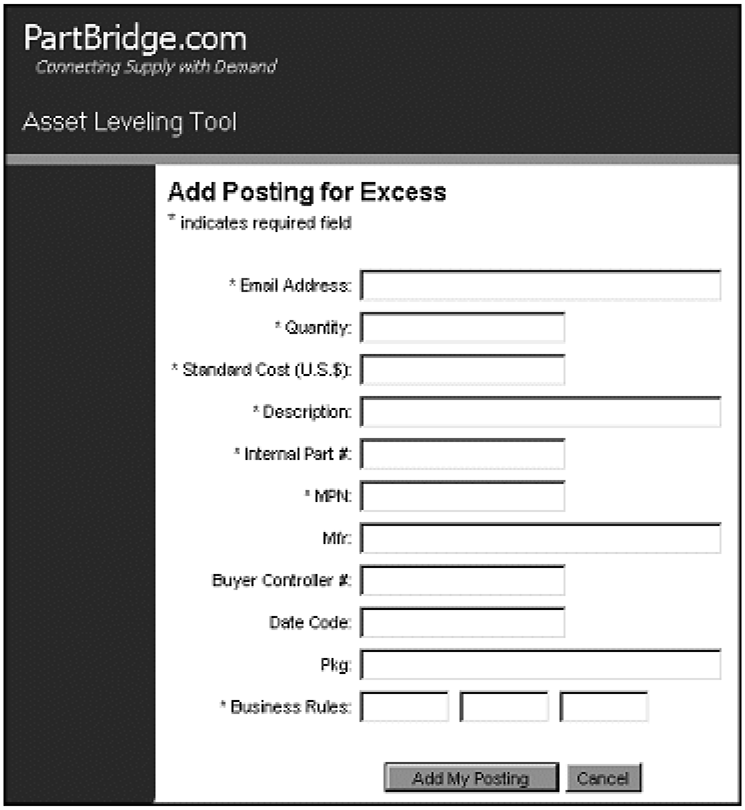
When you are finished with your changes, click the Update My Postings button.

The Postings window also has these buttons:

- Undo All Changes -- Undoes all changes you have made in the window, as long as you have not yet clicked the Update My Postings button.
- Close All My Postings -- Closes all the postings at once without requiring you to check all the Close checkboxes.
- Add A Posting -- Opens a new window in which you can add a single line item to your existing postings.

Adding a Single Posting

To append a single line item to your existing postings, click the Add a Posting button in the Postings window. The Add Posting window opens.



The Add Posting window has the same fields as a tab-delimited text file used for uploading part data. Enter all the appropriate data, then click Add My Posting.

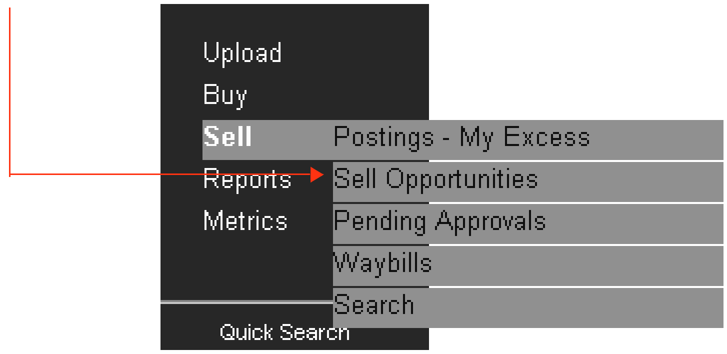
Viewing Sell Opportunities

Sell Opportunities are generated when a potential seller searches for items to sell and at least one match is found to a potential buyer's posting.

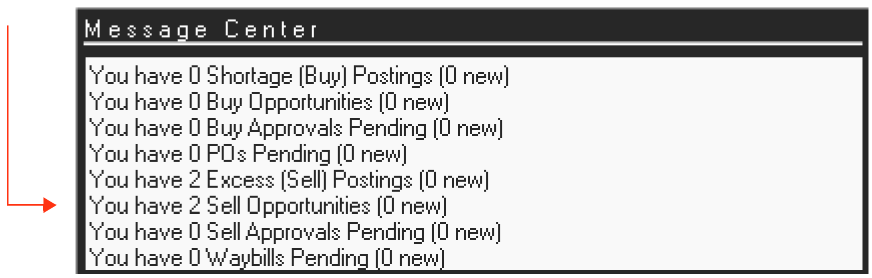
Only users with no uploaded postings (Passive Participants) may search for Sell Opportunities. Active Participants (those with uploaded files) are not permitted to search for Sell Opportunities. As a result, Active Participants do not see the Search button in the Sell menu. In addition, both the Quick Search and the Advanced Search functions are limited to searches for Buy Opportunities for Active Participants.

To view your Sell Opportunities, log in with your user name and password, and then do one or the other of the following:

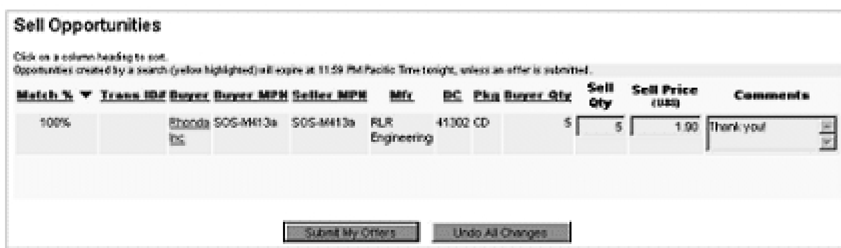
A. Select Sell Opportunities from the Sell menu, or



B. Click the Sell Opportunities line in the Message Center.



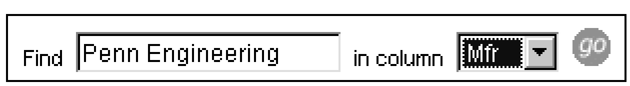
The Sell Opportunities window lists all your Sell Opportunities.



Searching for a Specific Line Item

To find a specific line item on the Sell Opportunities screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.



The window refreshes and displays only the results of your search. To view all your postings again, click the line about Sell Opportunities in the Message Center.

- To sort by column, click the column heading. For example, the MFR column can be sorted alphabetically.

Working with Sell Opportunities

For each line item that you would like to pursue further as a possible sale, take these steps:

1. Enter a Seller Qty. Notice that the Buyer Qty changes to reflect your offered Sell Qty.
2. Enter a Seller Price.
3. Add Comments (not required).
4. Click the Submit My Offers button.

You can undo all your changes by clicking the Undo All Changes button if you have not yet clicked the Submit My Offers button.

After you click the Submit My Offers button, the following actions occur:

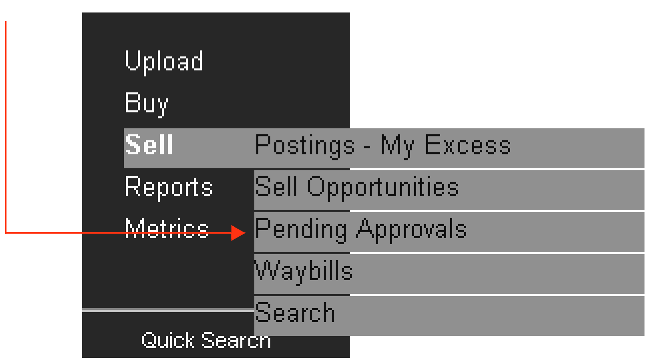
- A transaction ID is opened in PartBridge.
- The transaction becomes visible to the buyer at the Buyer Pending Approval window, where the buyer can accept or decline the seller's offer.
- A transaction remains visible in the Sell Opportunities window until a PO number is entered at the buyer's Purchase Orders Pending window.

Viewing Transactions Pending Seller Approval

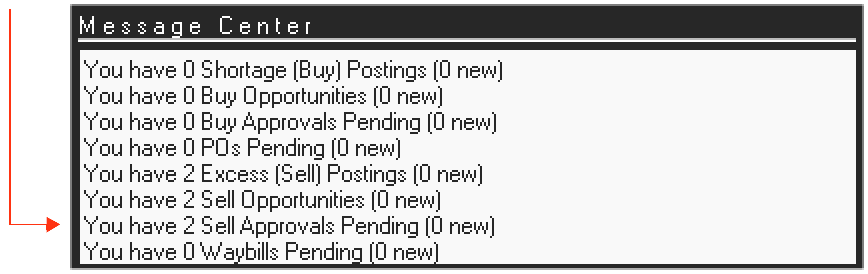
After a buyer submits an order to a seller, that order appears on the seller's list of transactions awaiting the seller's approval. PartBridge.com updates the Message Center and sends an e-mail message to the seller.

To view your transactions pending seller approval,log in with your user name and password, and then do one or the other of the following:

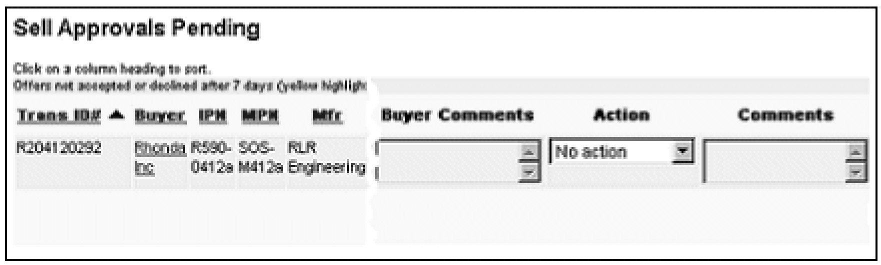
A. Select Pending Approvals from the Sell menu, or



B. Click the Sell Approvals Pending line in the Message Center.



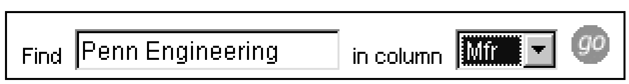
The Sell Approvals Pending window lists all the transactions pending seller approval.



Searching for a Specific Line Item

To find a specific line item on the Sell Approvals Pending screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the "go" button.



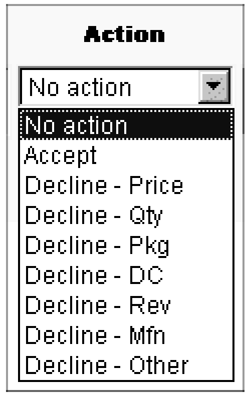
  The window refreshes and displays only the results of your search. To view all your postings again, click the line about Sell Approvals Pending in the Message Center.

- To sort by column, click the column heading. For example, the Trans ID column can be sorted in ascending or descending order.

Working with Sell Approvals Pending

For each line item, take these steps:

1. Select a choice from the Action drop-down list:



2. Add comments, if desired. (Required if you select Decline - Other.)
3. When you have finished, click the Submit button.

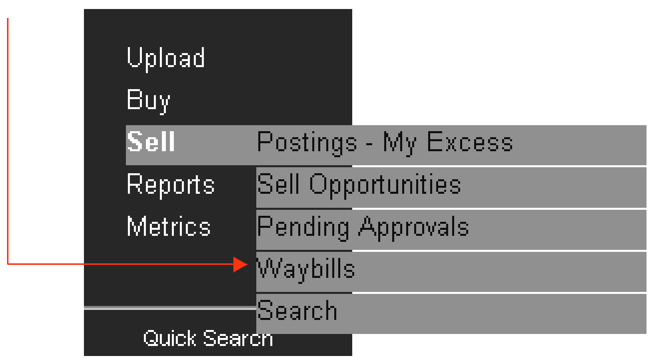
After you click the Submit button, the transactions you have accepted will move to the buyer's Purchase Orders Pending window, where the buyer will supply a PO number. The transactions you have declined will close. Offers you neither accept nor decline close automatically after seven calendar days.

Providing Waybill (BOL) Numbers for Open Transactions

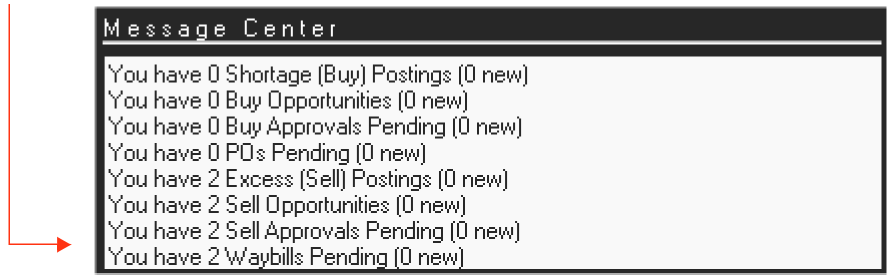
After the buyer provides a PO number, a transaction becomes visible at the Waybills Pending window.

To view your transactions pending seller approval,log in with your user name and password, and then do one or the other of the following:

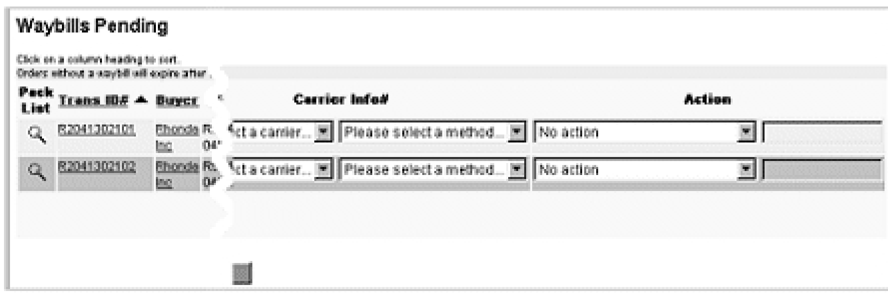
A. Select Waybills from the Sell menu, or



B. Click the Waybills Pending line in the Message Center.



The Waybills Pending window lists all the transactions that require waybill numbers.



Searching for a Specific Line Item

To find a specific line item on the Waybills Pending screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.

  The window refreshes and displays only the results of your search. To view all your postings again, click the line about Waybills Pending in the Message Center.

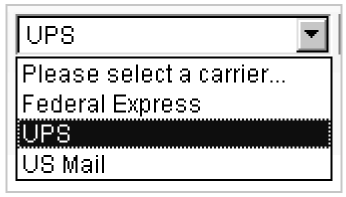
- To sort by column, click the column heading. Example: The Trans ID column can be sorted in ascending or descending order.

Completing a Transaction

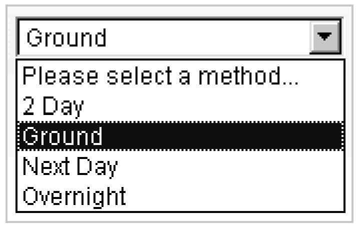
For each transaction that are you are completing, do the following:

1. Enter a waybill number.

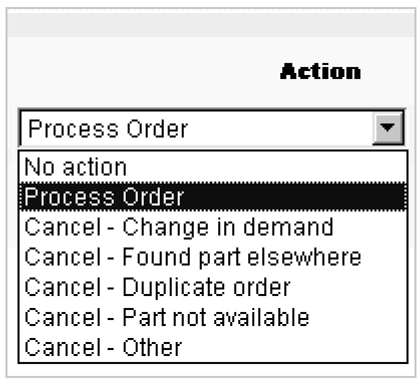
2. Select a carrier from the drop-down list.



3. Select a ship method from the drop-down list.



4. Select an action from the drop-down list.

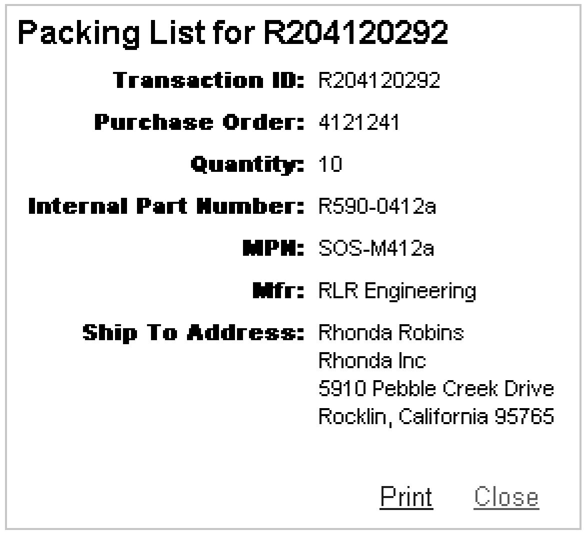


5. Enter comments (Required if you select Cancel - Other.)
6. Click the Submit button. After you submit a waybill number for a transaction, the transaction closes.

If you take no action in this window, a transaction will close automatically after seven calendar days.

Creating a Packing List

The Pack List link in each line opens a new window from which you can view and print a Packing List for that transaction.



Searching for Sell Opportunities (Without Posting)

Only users with no uploaded postings (Passive Participants) may search for Sell Opportunities.

Active Participants (those with uploaded files) are not permitted to search for Sell Opportunities. As a result, Active Participants do not see the Search button in the Sell menu. In addition, both the Quick Search and the Advanced Search functions are limited to searches for Buy Opportunities for Active Participants.

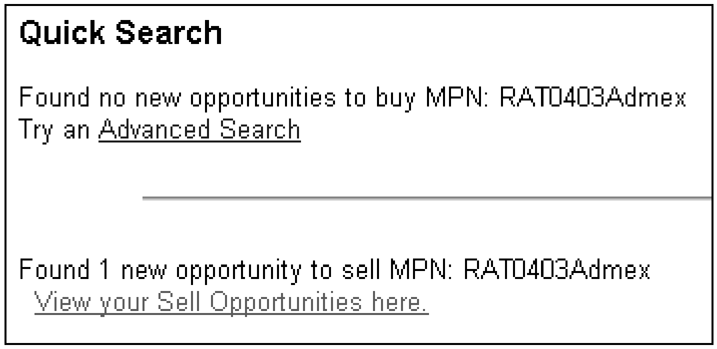
Passive Participants have two ways to search for Sell Opportunities: Quick Search and Advanced Search.

Using Quick Search

Passive Participants can use Quick Search to look for Sell Opportunities.

Enter a Manufacturer’s Part Number in the MPN: field and click the “go” button. All matches appear on a summary page.

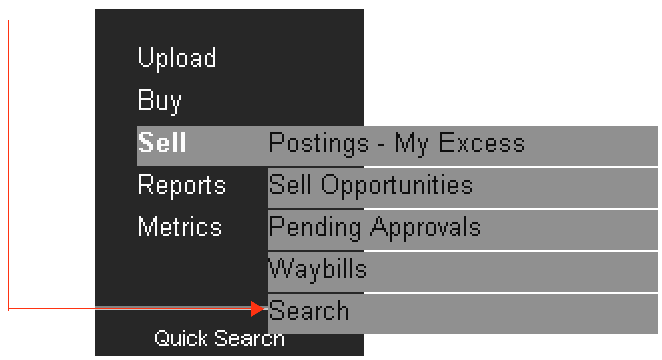
From this search results summary, you can go to the Advanced Search window, or you can view the matches on your Opportunities pages.



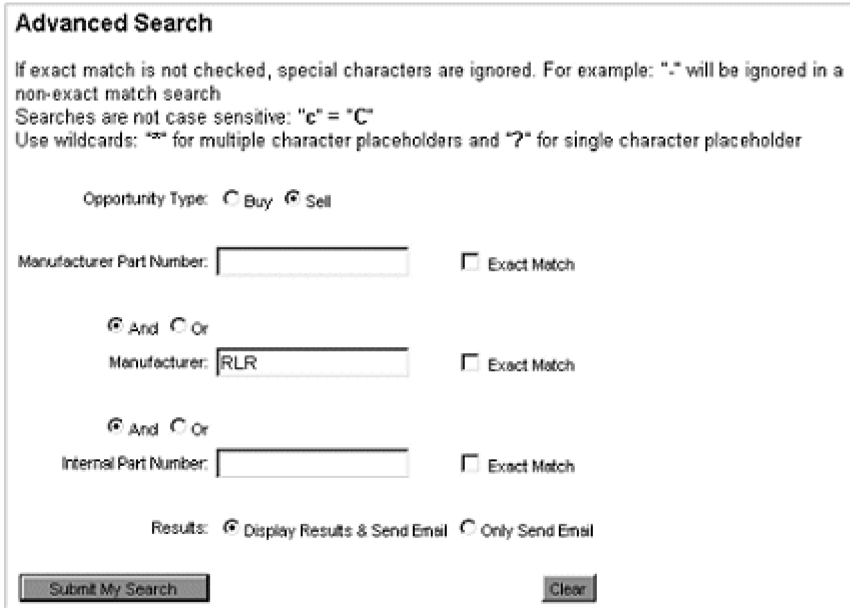
Using Advanced Search

Passive Participants (those with no current postings) can use Advanced Search to look for Sell Opportunities.

To reach the Advanced Search window, click the Search button on the PartBridge home page or the Sell menu.



PartBridge displays the Advanced Search window.



When entering values in the search window fields, note the following:

- If the Exact Match box is not checked, special characters such as underscores and commas are ignored. Example: A_12,345 is the same as A12345.
- Searches are not case-sensitive. In other words, A123 is the same as a123.
- For multiple character placeholders, use an asterisk (*). Example: A123* will find A123456, A12345678, etc.
- For a single character placeholder, use a question mark (?). Example: A123? will find A1234, A1235, etc.

To search for a part or item to sell, follow these steps:

1. Select Sell as the opportunity type.
2. Enter a value in one or more of the following fields:
   a. Manufacturer Part Number
   b. Manufacturer
   c. Internal Part Number
3. Select “And” or “Or” radio buttons as appropriate.
4. Check the Exact Match boxes, where appropriate.
5. Select to see the results displayed in the window and by e-mail, or just by e-mail.
6. Click the Submit My Search button.

Note that you may want to run several queries using different variations of a manufacturer’s name. For example, HP will not match Hewlett-Packard as the manufacturer.

Results of a search appear first in a summary window. Click the link to view the matches at the Sell Opportunities page.

A seller's search expires at the end of the business day.

Canceling or Closing Open Transactions

A seller is able to cancel or close an open transaction at two points along the selling process.

At the Seller Pending Approval window, the seller can take these actions:

- Decline the order and provide a reason. The Transaction ID closes.
- Ignore the order and take no action. The Transaction ID automatically closes in seven calendar days.

At the Waybills Pending window, the seller can take these actions:

- Cancel the transaction and close the Transaction ID.
- Ignore the transaction. The Transaction ID automatically closes after seven calendar days.

Buying Direct Materials on PartBridge.com

Buying material on PartBridge involves the following activities:

- Logging in to PartBridge.com with your direct materials user name and password
- Deciding between posting and searching
- Viewing, editing and appending existing postings
- Adding a single posting
- Viewing buying opportunities
- Viewing transactions pending buyer approval
- Providing purchase order numbers for open transactions
- Searching for buying opportunities (without posting)
- Canceling or closing transactions

Buying Direct Materials: Posting vs. Searching

As a user of PartBridge.com, you can advertise for material you would like to buy by uploading ("posting") a list of line items. For information on creating and uploading files, see Posting Direct Materials Data.

You can also search for items to buy using the search functions of PartBridge.com. For information about searching for Buy Opportunities, see Searching for Buying Opportunities (Without Posting).

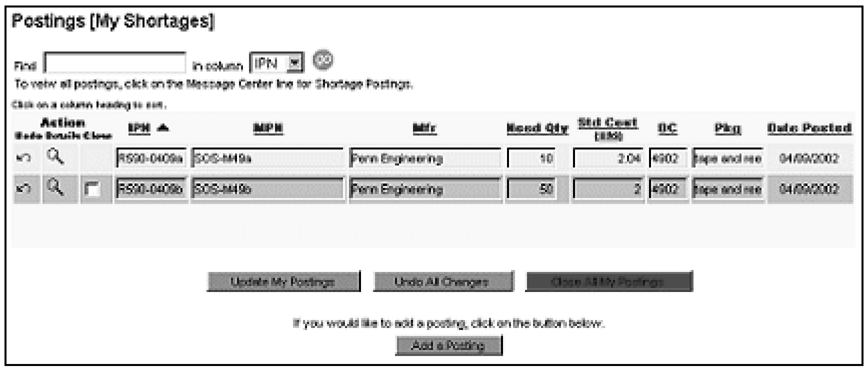
Viewing and Editing Existing Postings

To view your existing postings, log in with your user name and password, and then do one or the other of the following:

A. Select Postings -- My Shortages from the Buy menu, or

B. Click the Shortage (Buy) Postings line in the Message Center.

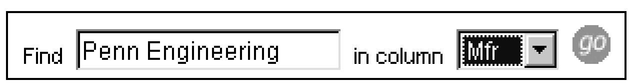
The Postings [My Shortages] window shows all your postings of shortages.



Searching for a Specific Line Item

To find a specific line item on the Postings screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.



  The window refreshes and displays only the results of your search. To view all your postings again, click the line about Shortage (Buy) Postings in the Message Center.

- To sort by column, click any column heading that looks like a hyperlink. For example, the IPN column can be sorted in ascending or descending order.

Working with Postings

You can take these actions with regard to each line item:

- Edit various fields: Most of the fields on the Postings screen are editable. Click the field and replace the existing data with new data.

Note: Once an offer has been submitted to buy or sell any portion of a posting, the posting can not be edited for the duration of the transaction (until the offer is declined or the transaction is closed or canceled.)

- Undo: Click the Undo button to return the line to the way it was before you started editing--if you have not yet clicked Update My Postings.
- Details: Click the Details button to open a new window with other information about the line item, such as Commodity Code, MPN, Other MPN, Mfr, Other Mfr, and Description. You can edit the fields in this window. To save your changes, Click Update My Posting. When you see the confirmation message, click Done to return to the Postings window.
- Close checkbox: Click the Close checkbox to close the item when you click the Update My Postings button.

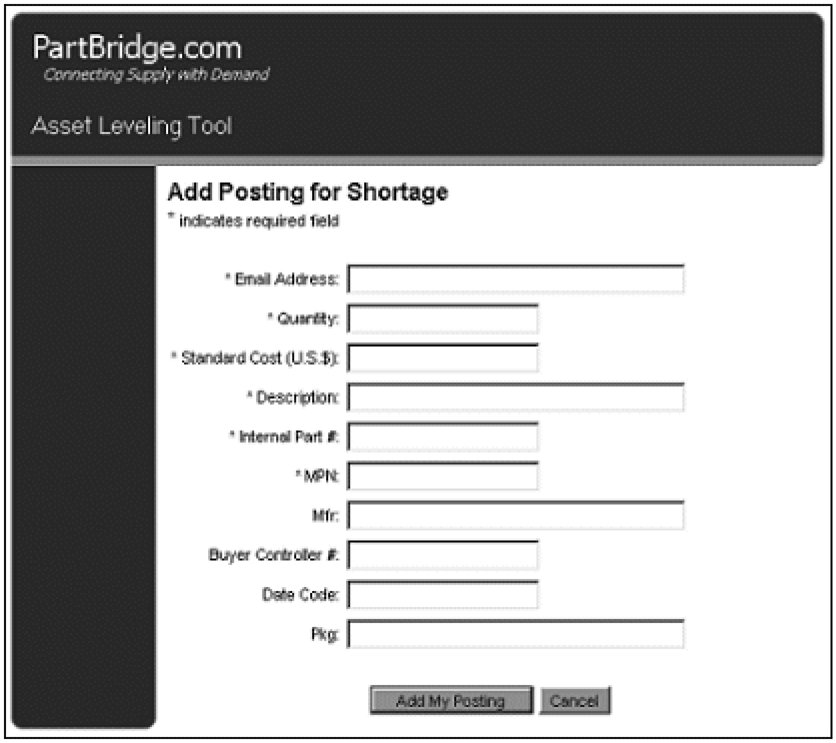
When you are finished with your changes, click the Update My Postings button.

The Postings window also has these buttons:

- Undo All Changes -- Undoes all changes you have made in the window, as long as you have not yet clicked the Update My Postings button.
- Close All My Postings -- Closes all the postings at once without requiring you to check all the Close checkboxes.
- Add A Posting --opens a window in which you can add a single line item to your existing postings.

Adding a Single Posting

To append a single line item to your existing postings, click the Add A Posting button on the Postings window. The Add Posting window opens.



The Add Posting window has the same fields as a tab-delimited text file used for uploading part data. Enter all the appropriate data, then click Add My Posting.

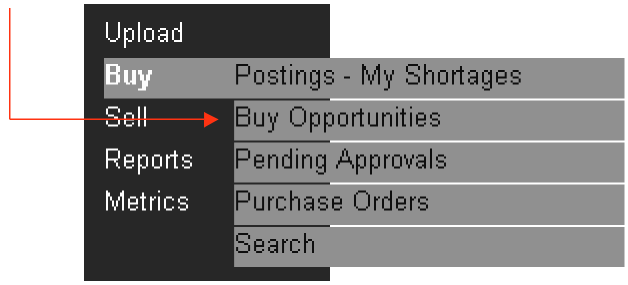
Viewing Buy Opportunities

Buy Opportunities are generated in one of two ways: either a match is found between a buyer's posted shortage and a seller's posted excess, or a match is found between a buyer's search and a seller's posted excess.

A buyer learns of a buying opportunity through an e-mail message generated when PartBridge finds a match or when a search results in a match. In addition, a buyer is kept up-to-date through information displayed in the Message Center.

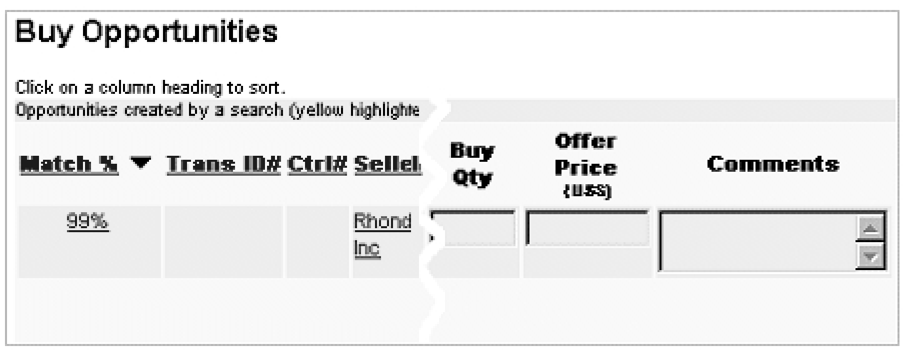
To view your Buy Opportunities, log in with your user name and password, and then do one or the other of the following:

A. Select Buy Opportunities from the Buy menu, or



B. Click the Buy Opportunities line in the Message Center.

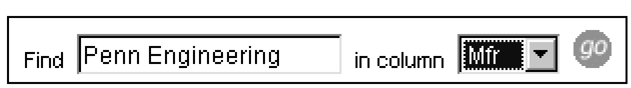
The Buy Opportunities window displays all of the line items that match your postings and searches.



Searching for a Specific Line Item

To find a specific line item on the Buy Opportunities screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.



The window refreshes and displays only the results of your search. To view all your postings again, click the line about Buy Opportunities in the Message Center.

- To sort by column, click any column heading that looks like a hyperlink. For example, the Seller column can be sorted alphabetically.

Working with Buy Opportunities

For each line item that you would like to pursue further as a possible purchase, do the following:

1. Enter a Buy Qty. Notice that the Available Qty and the Need Qty both change to reflect your Buy Qty offer.
2. Enter an Offer Price.
3. Add Comments (not required).

When you are finished making changes, click the Submit My Offers button.

You can undo all your changes by clicking the Undo All Changes button if you have not yet clicked the Submit My Offers button.

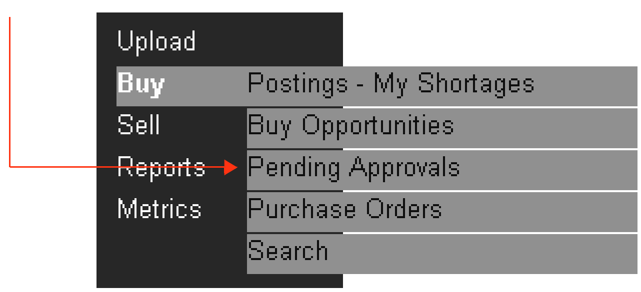
After you click the Submit My Offers button, a transaction ID is opened in PartBridge and the line item becomes visible to the seller at the Seller Pending Approval window, where the seller can accept or decline your offer.

Viewing Transactions Pending Buyer Approval

After a seller submits an offer at the Sell Opportunities window, the transaction moves to the buyer's Pending Buyer Approval window.

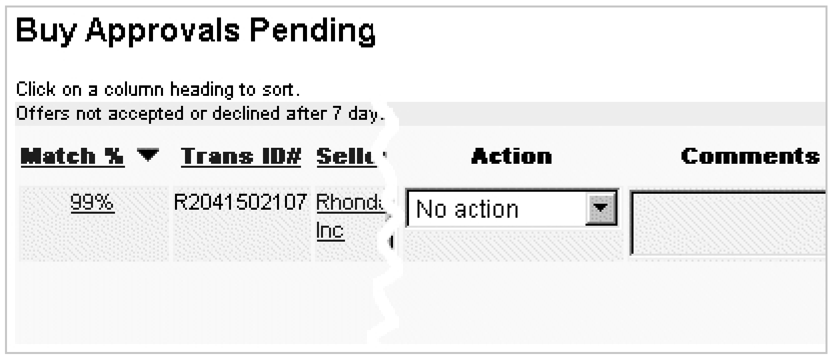
To view the transactions that are pending buyer approval, log in with your user name and password, and then do one or the other of the following:

A. Select Pending Approvals from the Buy menu, or



B. Click the Buy Approvals Pending line in the Message Center.

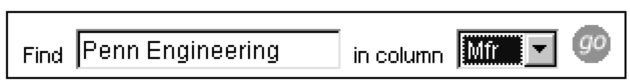
The Pending Buyer Approvals window lists all the sellers' offers that are pending buyer approval.



Searching for a Specific Line Item

To find a specific line item on the Pending Buyer Approvals screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the "go" button.



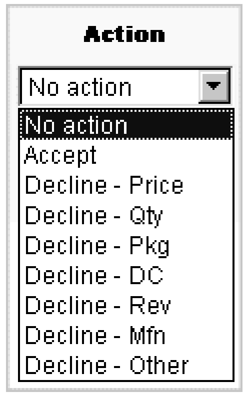
  The window refreshes and displays only the results of your search. To view all your postings again, click the line about Pending Buyer Approvals in the Message Center.

- To sort by column, click the column heading. For example, the Trans ID column can be sorted in ascending or descending order.

Working with Pending Buyer Approvals

For each line item, take these steps:

1. Select an action from the Action drop-down list.



2. Add comments. (Required if you select Decline - Other from the Action list.)
3. After you have finished making your changes, click the Submit button.

You may undo all the changes you make prior to clicking the Submit button by clicking the Undo All Changes button.

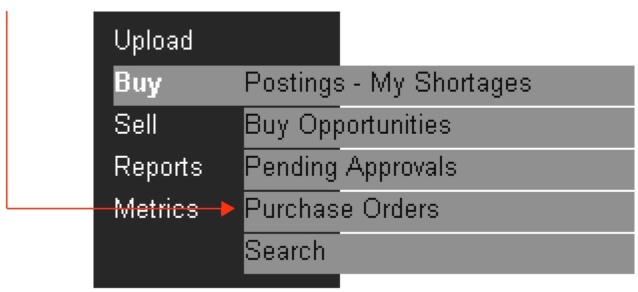
Any transactions visible at this window that you neither accept nor decline close automatically after seven calendar days.

Providing Purchase Order Numbers For Open Transactions

After the buyer and seller have agreed to the terms of the transaction, the transaction moves to the Purchase Orders Pending window.

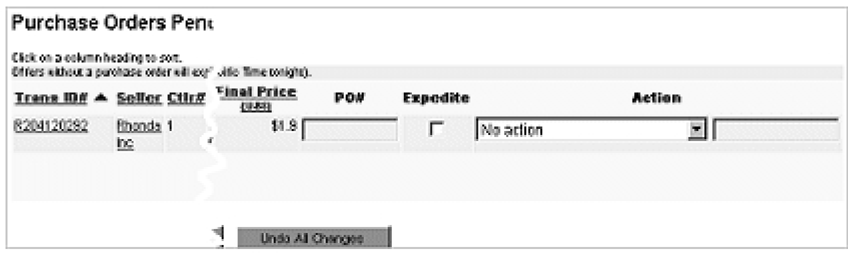
To view the transactions needing a PO number, log in with your user name and password, and then do one or the other of the following:

A. Select Purchase Orders from the Buy menu, or



B. Click the POs Pending line in the Message Center.

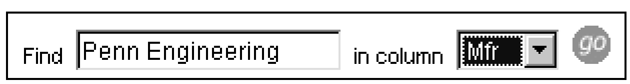
The Purchase Orders Pending window shows all the transactions that require the buyer to enter a Purchase Order number.



Searching for a Specific Line Item

To find a specific line item on the Purchase Orders Pending screen, you can search for information or you can sort by column.

- To search for a particular line item, enter the word(s) or number(s) you wish to find and select the column from the drop-down list; then click the “go” button.



  The window refreshes and displays only the results of your search. To view all your postings again, click the line about POs Pending in the Message Center.

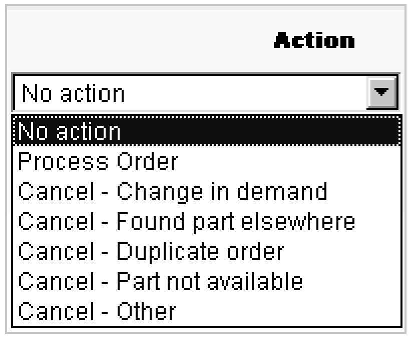
- To sort by column, click any column heading that looks like a hyperlink. For example, the Trans ID column can be sorted in ascending or descending order.

Working with Purchase Orders Pending

To complete a line item at the Purchase Orders Pending window, follow these steps:

1. Enter the Purchase Order number in the PO# field.
2. If you want to expedite this shipment, click the Expedite checkbox.

3. If you are canceling a transaction, omit steps 1 and 2 above; instead, select one of the cancel reasons from the drop-down list.



4. Enter comments. (Required if you select Cancel - Other from the Action list.)
5. When you have finished working with line items at the Purchase Orders Pending window, click the Submit button.

If no action is taken on a transaction in the Purchase Orders Pending window, the transaction closes automatically after seven calendar days.

Searching for Buy Opportunities (Without Posting)

There are two ways to search for buying opportunities on PartBridge, Quick Search and Advanced Search.

Using Quick Search

PartBridge users can look for Buy Opportunities with Quick Search.

Enter a Manufacturer's Part Number in the MPN: field and click the "go" button. Any matches will be shown on a summary page.

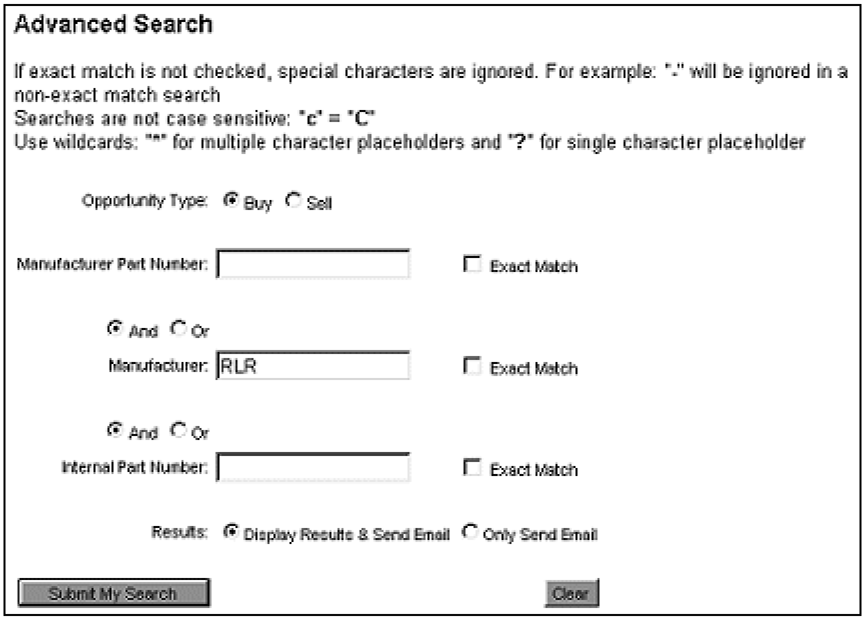
From the Quick Search results page, you can go to the Buy Opportunities page.

Using Advanced Search

The second method for searching is to use the Advanced Search.

To reach the Advanced Search window, click the Search button on the PartBridge home page or the Buy menu.

PartBridge displays the Advanced Search window.



When entering values in the search window fields, note the following:

- If the Exact Match box is not checked, special characters such as underscores and commas are ignored. Example: A_123,45 is the same as A12345.
- Searches are not case-sensitive. In other words, A123 is the same as a123.
- For multiple character placeholders, use an asterisk (*). Example: A123* will find A123456, A12345678, etc.
- For a single character placeholder, use a question mark (?). Example: A123? will find A1234, A1235, etc.

To search for a part or item, follow these steps:

1. Select Buy as the opportunity type.
2. Enter a value in one or more of the following fields:
    a. Manufacturer Part Number
    b. Manufacturer
    c. Internal Part Number
3. Select “And” or “Or” radio buttons as appropriate.
4. Check the Exact Match boxes, where appropriate.
5. Select to see the results displayed in the window and by e-mail, or just by e-mail.
6. Click the Submit My Search button.

Note that you may want to run several queries using different variations of a manufacturer’s name. For example, HP will not match Hewlett-Packard as the manufacturer.

Results of a search appear first in a summary window. Click the link to view the matches at the Buy Opportunities window.

A buyer's search expires at the end of the business day.

Canceling or Closing a Transaction

A buyer is able to cancel or close an open transaction at two points along the selling process.

At the Buyer Pending Approval window, a buyer can take these actions:

- Decline the seller's offer and provide a decline reason. The Transaction ID closes.
- Ignore the offer and take no action. The Transaction ID automatically closes after seven calendar days.

At the Purchase Order Pending window, a buyer can take these actions:

- Select a cancel reason from the drop-down list provided. The Transaction ID closes.
- Ignore the transaction. The Transaction ID automatically closes after seven calendar days.

Generating Reports

[to be added]

Viewing Metrics

[to be added]