Self Service User Guide

Contents

1. About this Guide

The Self Service solution that is part of the Blume Digital Operating Platform, enables users to Manage Users and Manage Trading Partners pages and create, edit, and delete users; give roles to multiple divisions and disable users to restrict them from using the application. Users can see and edit the Trading partners from the Manage Trading Partners page.

The various modules and sections of Self Service solution are briefly explained and the procedure to use them are described in a series of steps.

2. Getting Started with Self Service Solution

This section provides details on the following information that enables users to get started with **Self Service** solution:

- Navigating to the Self Service Solution *(on page 4)*
- Self Service Components *(on page 7)*

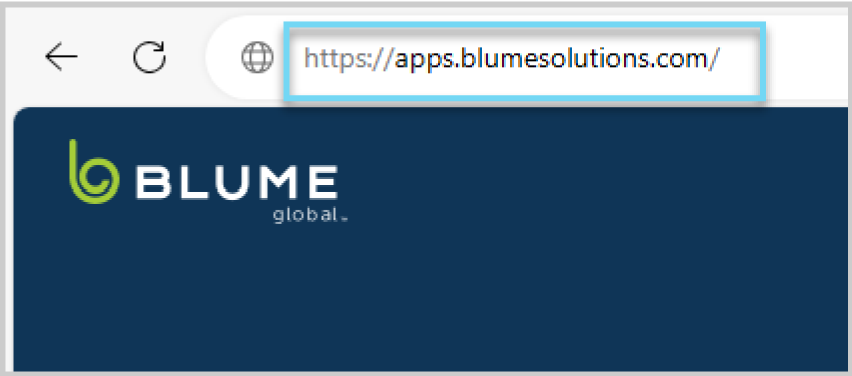
2.1. Navigating to the Self Service Solution

Users must be subscribed to the **Self Service** solution to access it. The procedure outlined on this guide enables users to navigate to **Self Service** solution .

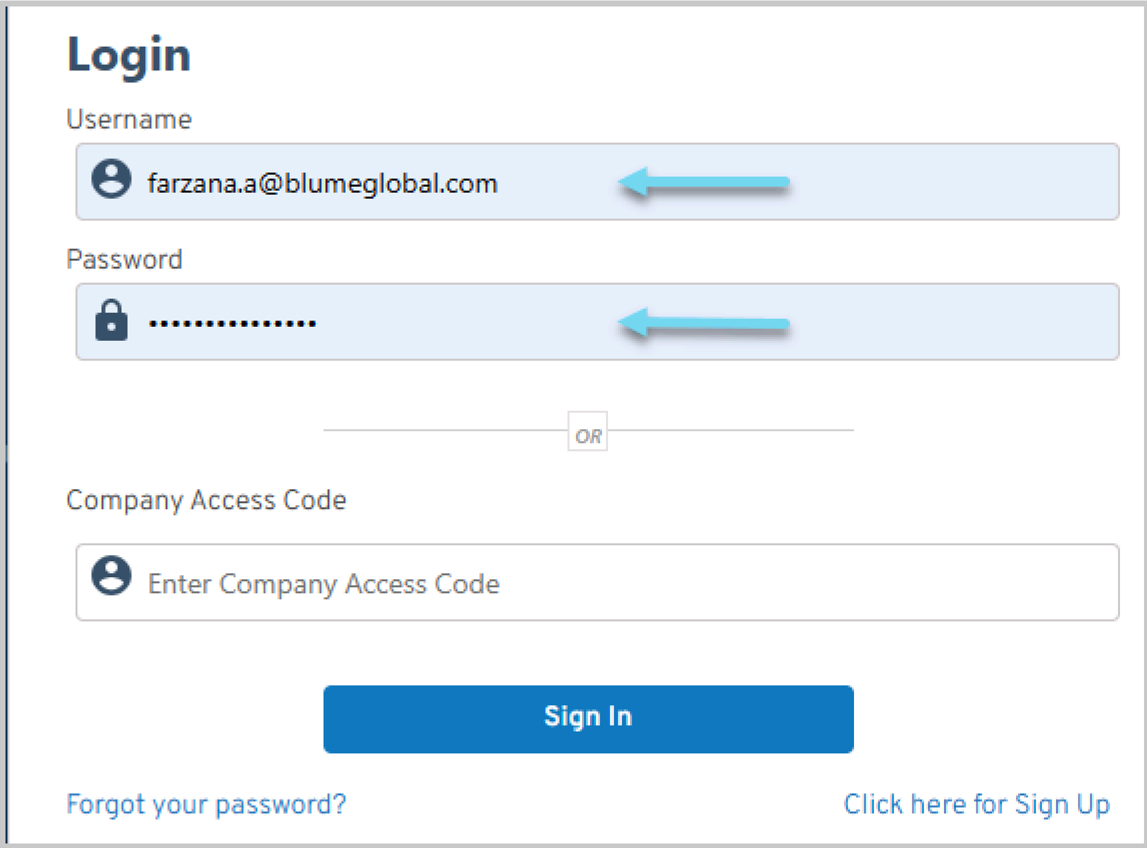
> **Note:** Contact your Blume Global Customer Service Representative to subscribe to the **Self Service** solution.

Perform the following steps to navigate to **Self Service** solution:

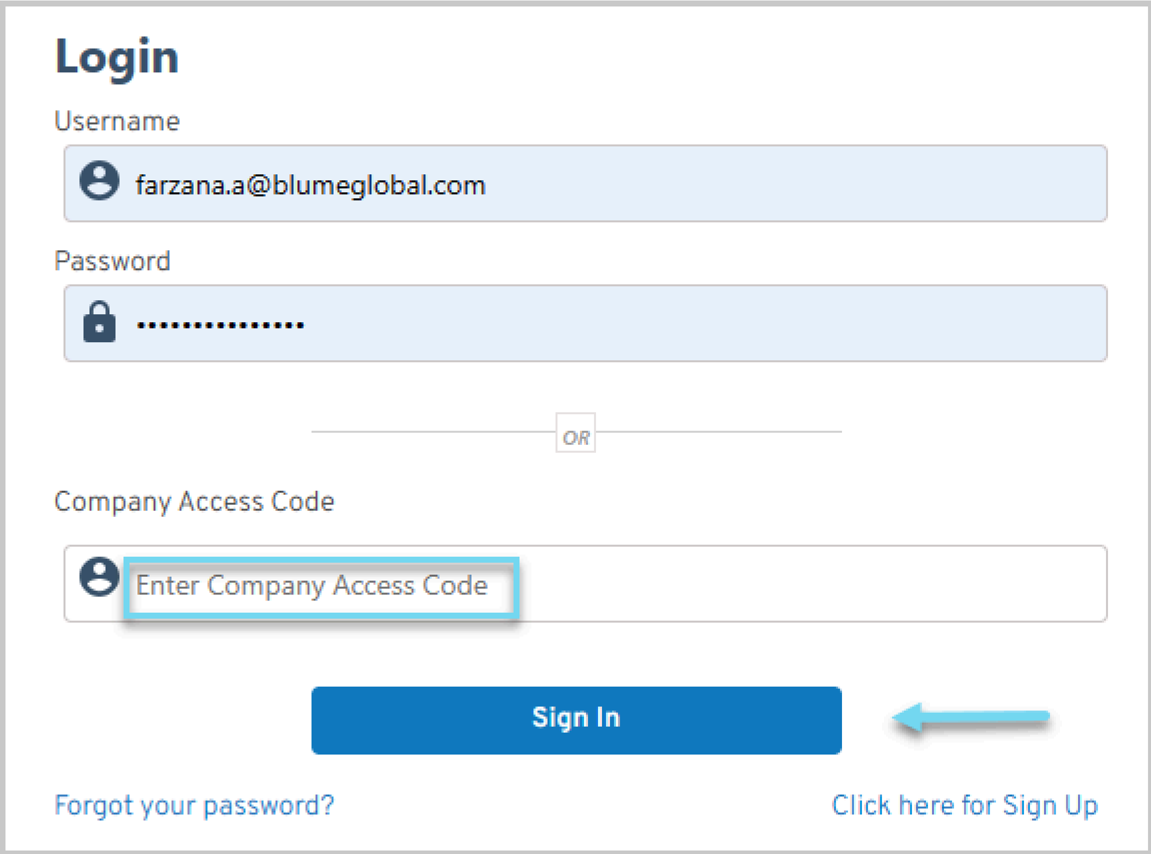
1. Navigate to https://apps.blumesolutions.com/blume-home.



2. Enter the **Username** and **Password** in the Blume Platform page displayed.



3. Click on **Sign In**



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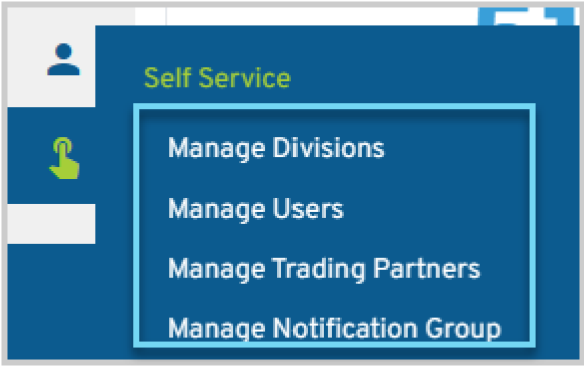
Note: If you have forgotten your password, click on the **Forgot your password?** URL. Alternatively, if you have not registered on the **Blume Solution**, click on the **Click here for Sign Up** URL.

Note: Users can also enter the **Company Access Code**.

4. Navigate to the **Self Service** solution in the left navigation menu.

5. Click on the required **Self Service** option.

Choice	Result
Manage Divisions	Displays the Divisions associated with the user.
Manage Users	Displays the list of users.
Manage Trading Partners	Displays the list of trading partners.
Manage Notification Group	Displays the notification groups.

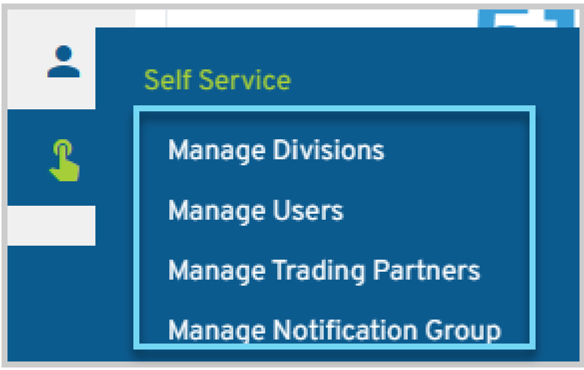


The **Blume Solution** user interface is displayed. Users can now proceed to access the **Self Service** solution. View the **Self Service** components for additional details on the various components that are part of the **Self Service** solution.

2.2. Self Service Components

The **Self Service** solution is comprised of the following components:

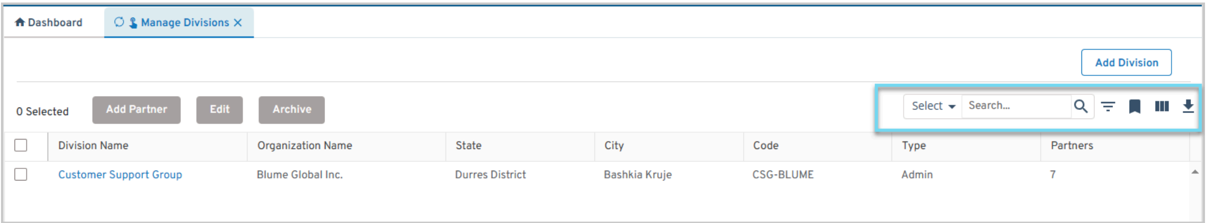
- **Manage Divisions**: Users can view the divisions that are a part of the organization.
- **Manage Users**: Users can view, add, archive, and email passwords to users that are a part of the organization.
- **Manage Trading Partners**: Users can view the trading partners that are a part of the organization.
- **Manage Notification Group**: Users can add, view, and edit the notifications.



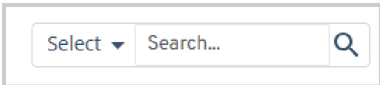
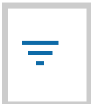
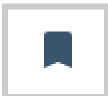
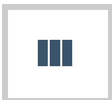
3. Introduction to the Grid Toolbar

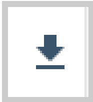
Users can utilize the **Grid Toolbar** to explore the content on the page and customize the page's display to align with their preferences and requirements.

A **Grid Toolbar** is available in the pages for **Manage Divisions**, **Manage Users**, and **Manage Notification Group.**



The **Grid Toolbar** has the following components:

Component Name	Component Icon	Component Description
Search		The Search Bar enables users to search for information related to the selected criteria.
Advance Filters		Users can manage existing filters and build new ones using the Advance Filters. Users can also select the default filter with this.
Manage Views		Users can manage existing views and build new ones using the Manage Views. Users can also select the default view with this.
Manage Columns		Users can add or remove columns from the current view using the Manage Columns option. Users can create a new view or modify the one they already have by adding or removing necessary columns.

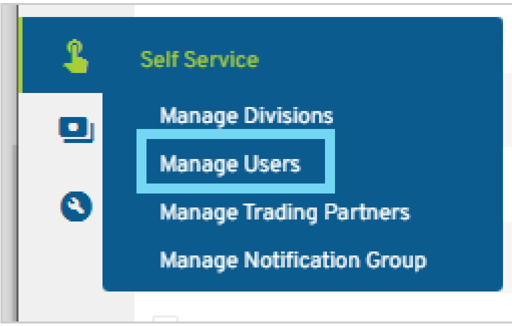
Component Name	Component Icon	Component Description
Download		Users can export the data accessible in the current view in Excel format by using the Download option. Users can perform a search, apply filters, or design a view to find the necessary data, then download it in Excel format.

3.1. Navigating to the Search Bar

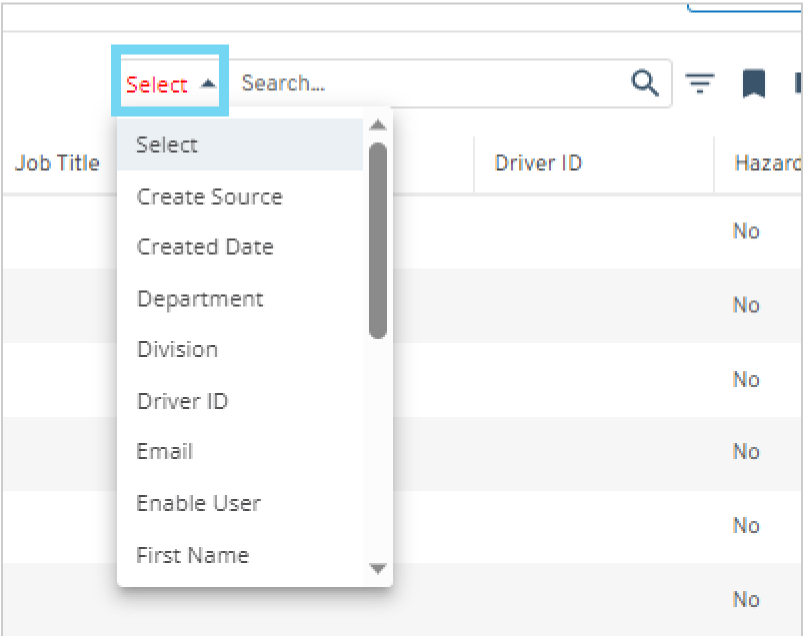
Users can use the **Search Bar** to look up information pertaining to the chosen criteria.

Perform the following steps to search the information with any respective attribute:

1. Navigate to **Self Service > Manage Users**.

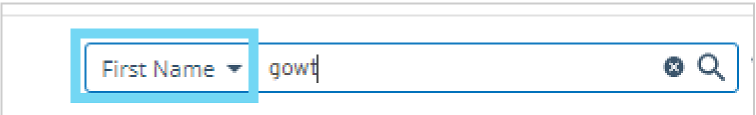


2. Click on the **Select** drop-down list in the **Manage Users** page.



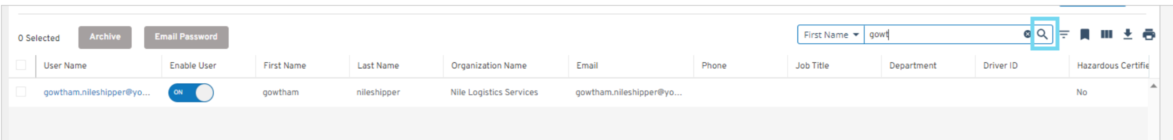
3. Click on the required **Attribute** .

4. Enter the required information related to the selected attribute in the **Search Bar**.



Note: Click on the **Cancel** icon to clear the **Search** field

5. Click on the **Search** icon and the required information related to the selected attribute and criteria is displayed.



The following attributes are available in the **Search** column:

Attributes	Description
Created Source	Source or origin of the user.
Created Date	Date and time when the user account is created.
Department	The department to which the user belongs

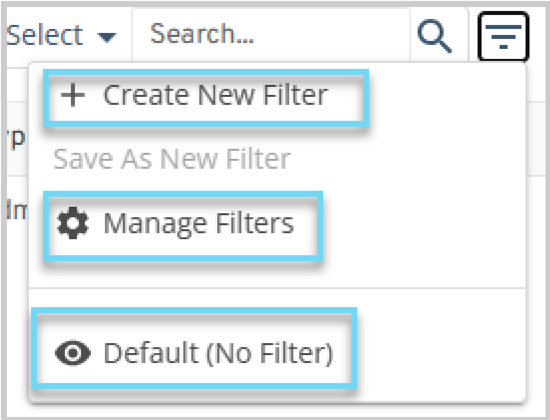
Attributes	Description
Division	The division or segment within the organization associated with the use.
Driver ID	Unique identifier for a driver in the system.
Email	User's email address for communication and authentication.
Enable User	Indicating whether the user account is enabled or disabled.
First Name	The user's first name.
Hazardous Certified	Certification status for handling hazardous materials.
Job Title	The specific role or job title of the user.
Last login date	Date and time of the user's last login.
Last Name	The user's surname name.
Member Role	Role assigned to the user within a group or organization.
Organization Name	The name of the organization to which the user belongs.
Phone	User's contact number.
Updated Date	Date when the user information was last updated.
User Name	Unique identifier or username for the user account.

3.2. Introduction to Advance Filters

Users can use the filters to organize and analyse large amounts of data quickly and efficiently. The **Digital Operating Platform** enables users to create filters as per requirements. The **Advance Filters** option enables users to create, edit, delete, and manage filters.

The **Advance Filters** functionality has the following components:

- **Create a New Filter**
- **Manage Filters**
- **Default (No Filter)**

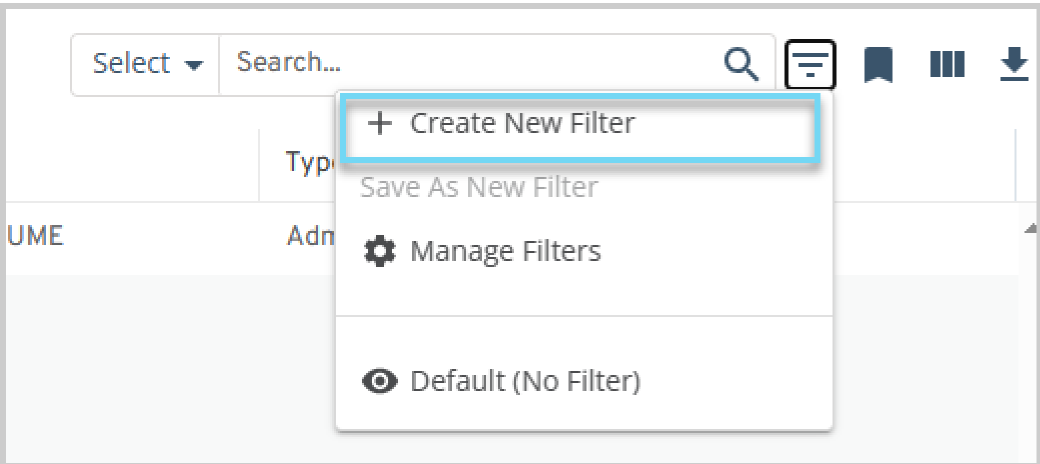


3.2.1. Creating a New Filter

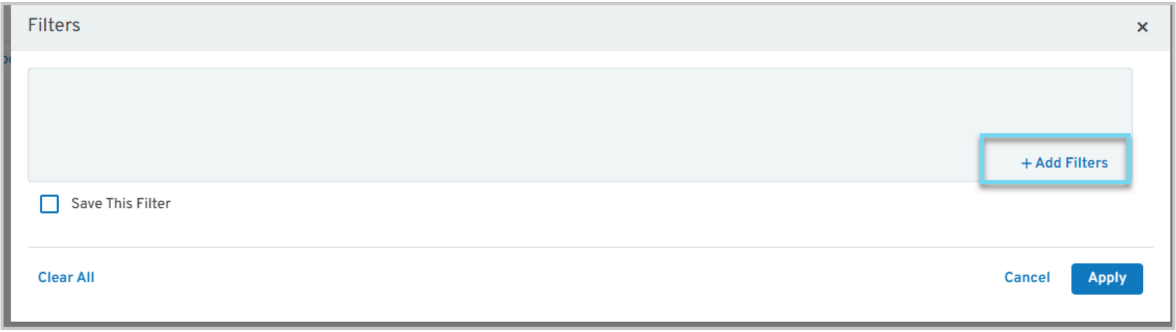
Creating a new filter in the **Digital Operating Platform** is immensely helpful for users. Filters serve as powerful tools that enhance the overall user experience by enabling users to narrow down their search results or preferences in the application.

Perform the following steps to create a new filter:

1. Click on **Advance Filters** icon in the **Grid Toolbar**.
2. Click on **+ Create New Filter** .



3. Click on the **+ Add Filters** tab in the **Filters** pop-up window.



Note: Users can add multiple filtering criteria as per their requirement.

4. Click on the required criteria and condition in the drop-down menu.

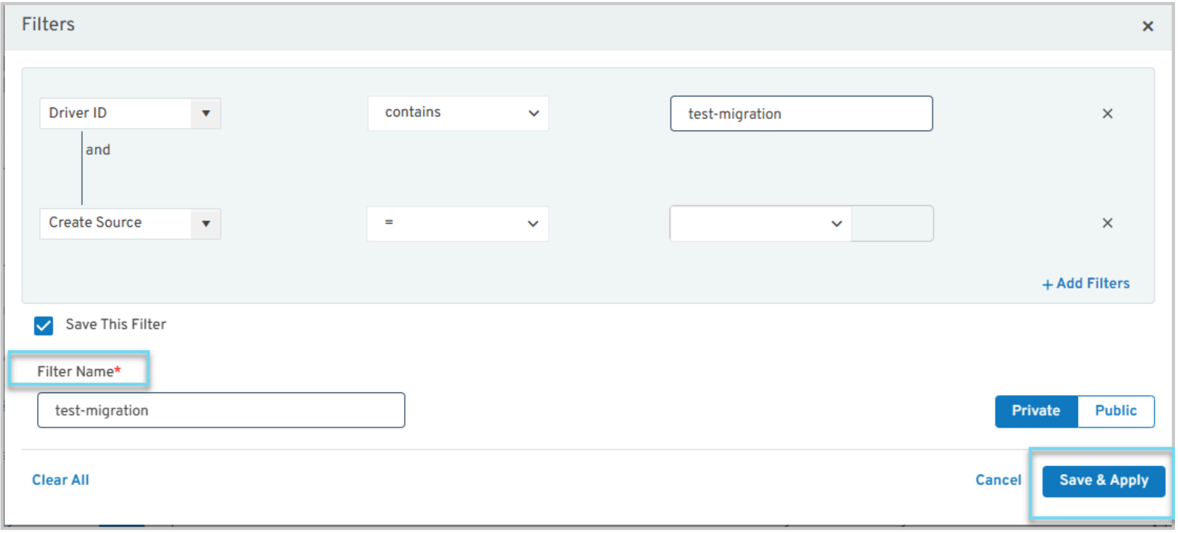
5. Enter the required value or attribute.

6. Tick the **Save This filter** box.

7. Enter the **Filter Name** .

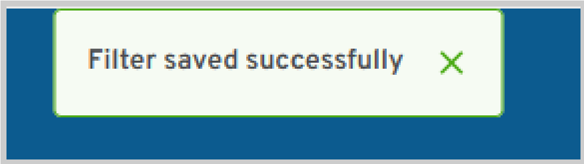
8. Click on the **Private** or **Public** button as per requirement.

9. Click on the **Save & Apply** button .



Note: Click on the **Cancel** button to go back to the **Manage Users** page.

A confirmation pop-up message is displayed on the page.

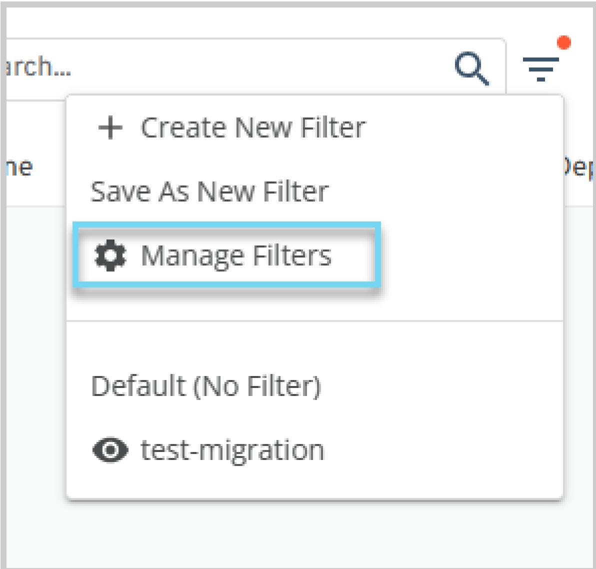


3.2.2. Manage Filters

The process of managing filters involves deleting, editing, and applying filters. It is also possible to remove or clear filters that have been applied, restoring all data to its original state.

Perform the following steps to manage the filters:

1. Click on the **Advance Filters** in the **Grid Toolbar**.
2. Click on the **Manage Filters.**

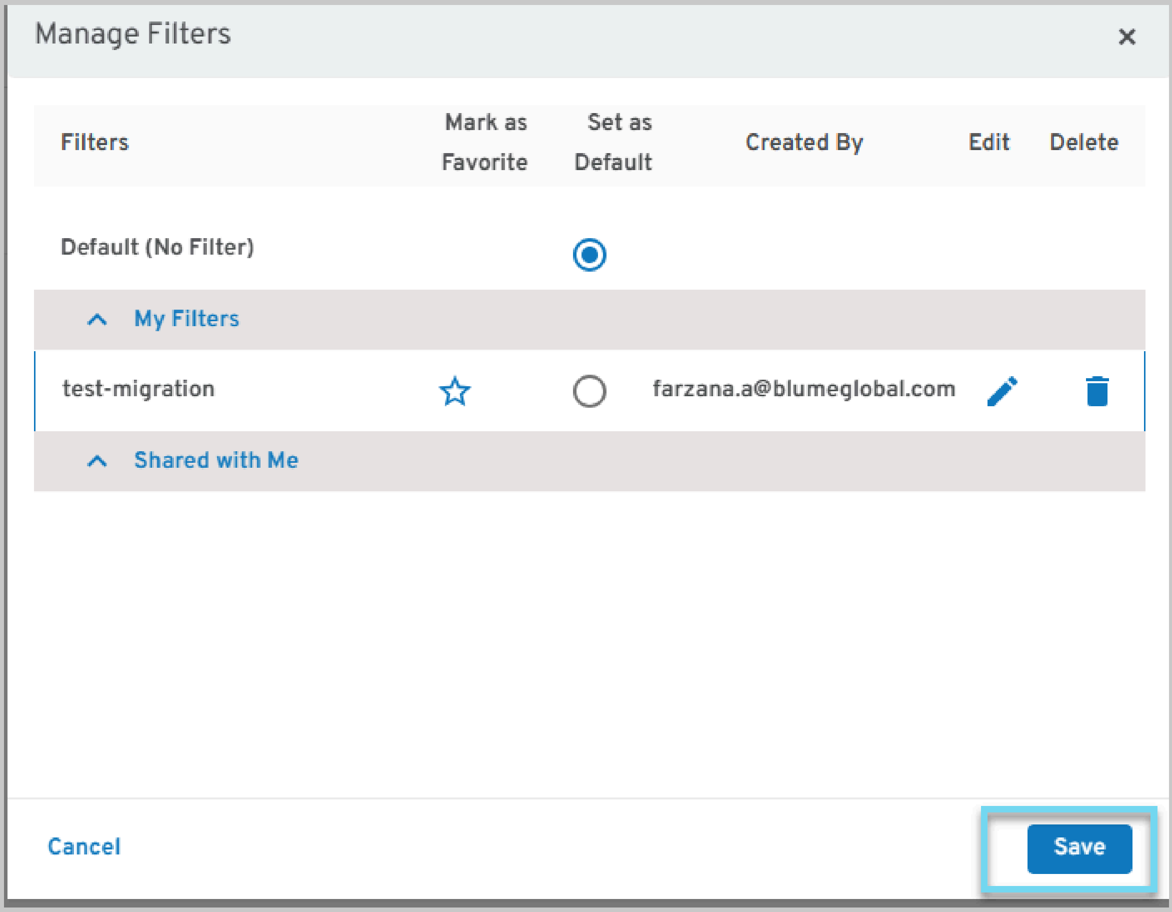


3. Click on the required action on the **Manage Filters** pop-up window.

Action	Description
Mark as Favourite	The selected filter becomes the favourite filter once selected.

Action	Description
Set as Default	The selected filter becomes the default filter.
Edit	The Edit option enables users to edit the filter.
Delete	The Delete option enables users to delete the filter.

4. Click on the **Save** button .



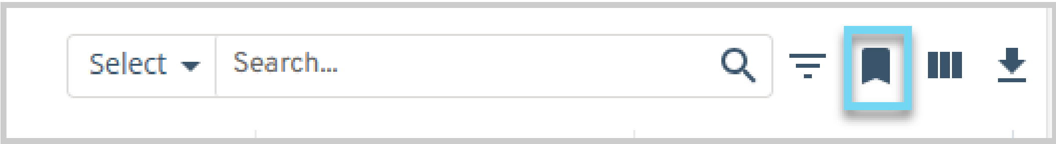
Note: Click on the **Cancel** button to go back to the **Manage Users** page.

3.3. Introduction to Manage Views

The **Digital Operating Platform** allows users to create, edit, and delete different ways of viewing data within the platform. Users can customize the layout, add or remove columns, and apply filters to the data. Users can create different views of their logistics data using the **Digital Operating Platform** .

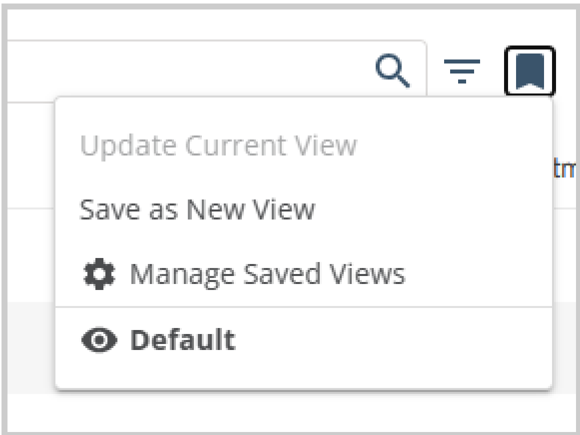
Users can save multiple views and access them later. Users can set one of the views as the default. It is also possible to share views within the platform with other users. It can be useful for teams to have a common view and work on the same data together.

Managing views in **Digital Operating Platform** is an invaluable aspect of working with large sets of data. It makes it easier for users to view relevant subsets of data and gain a better understanding of patterns and trends within them.



The **Manage views** functionality has the following components:

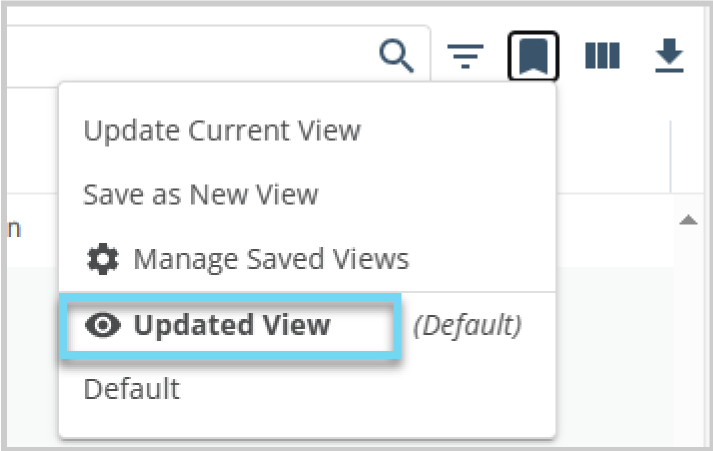
- **Update Current View**
- **Save as New View**
- **Manage Saved Views**
- **Default**



3.3.1. Update Current View

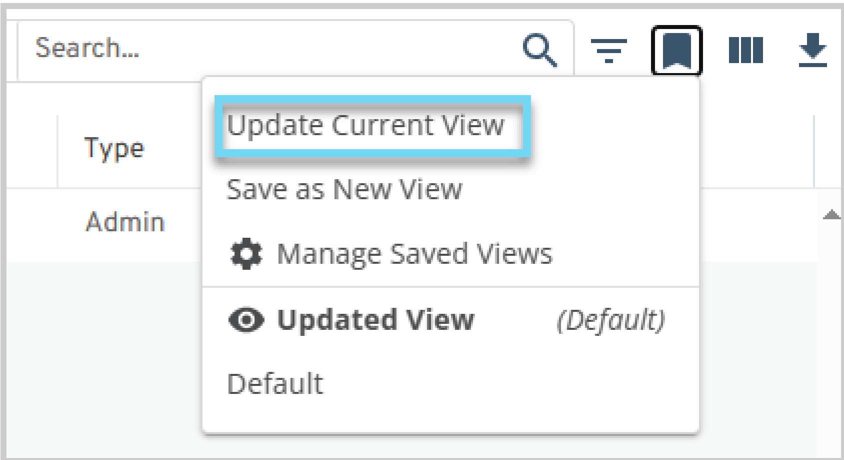
Perform the following steps to update the current view:

1. Click on the **Manage Views** functionality in the Grid Toolbar.
2. Select the required view.

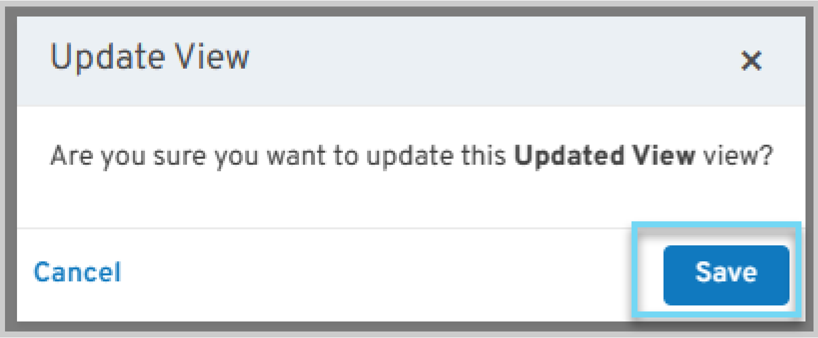


Note: In the above image **Updated View** is the name of sample view that is created.

3. Add or remove the required columns to or from the current view.
4. Click on **Manage Views**.
5. Click on **Update Current View** .



Click on the **Save** button.



3.3.2. Create a New View

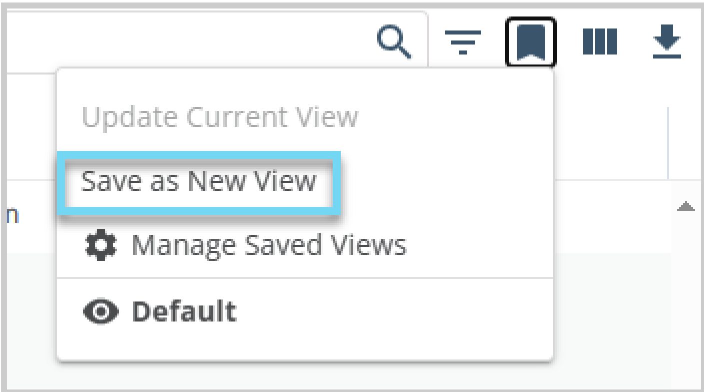
Perform the following steps to create a new view:

1. Add or remove the required columns to or from the current view.

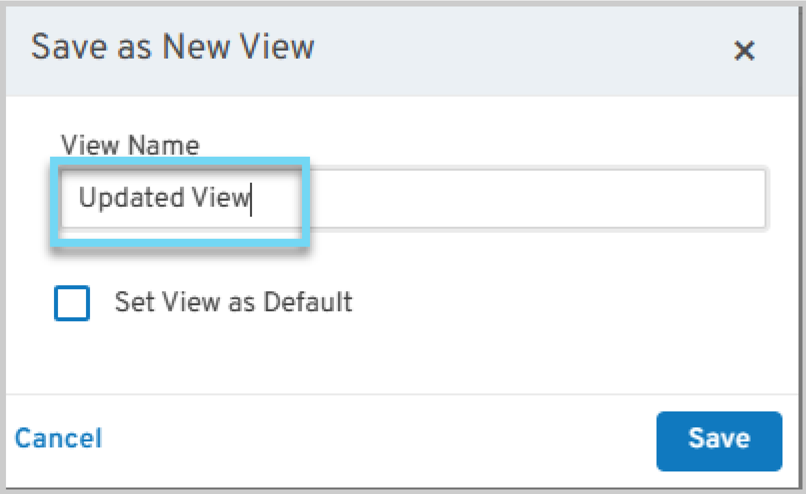
> **Note:** If required drag and drop columns left or right to reorder.

2. Click on the **Manage Views**.

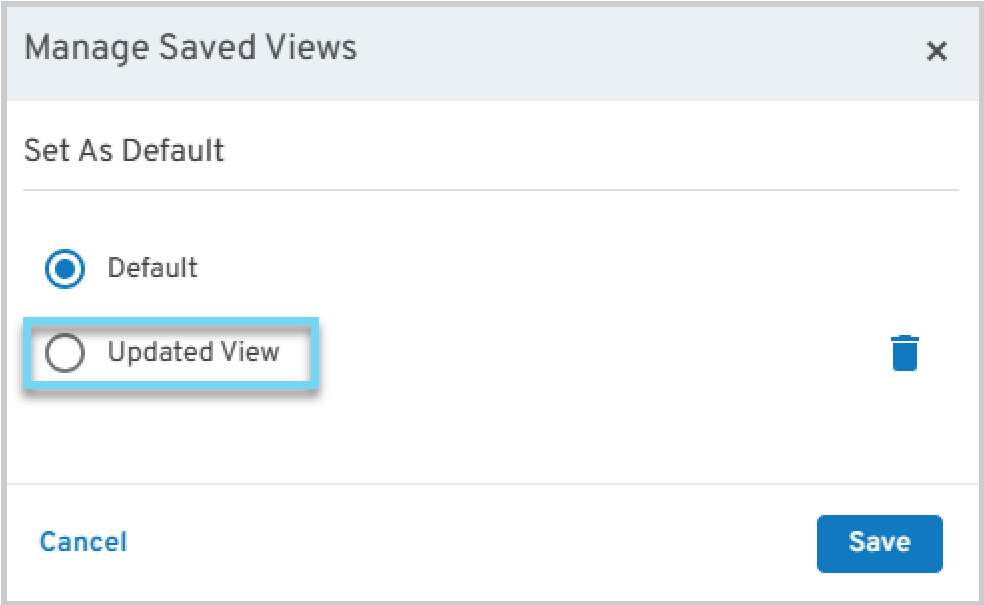
3. Click on the **Save as New Views** on the **Manage Views** pop-up window.



4. Enter the **View Name** on the **Save as New View** pop-up window.



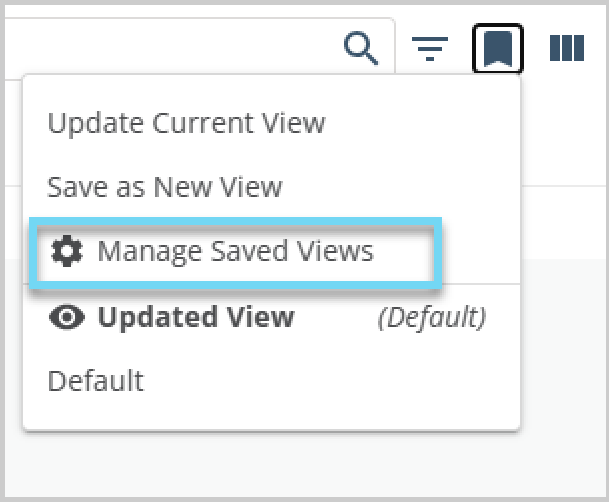
5. Click on the **Save** button.
   The added view is displayed on the **Manage Saved Views** pop-up window.



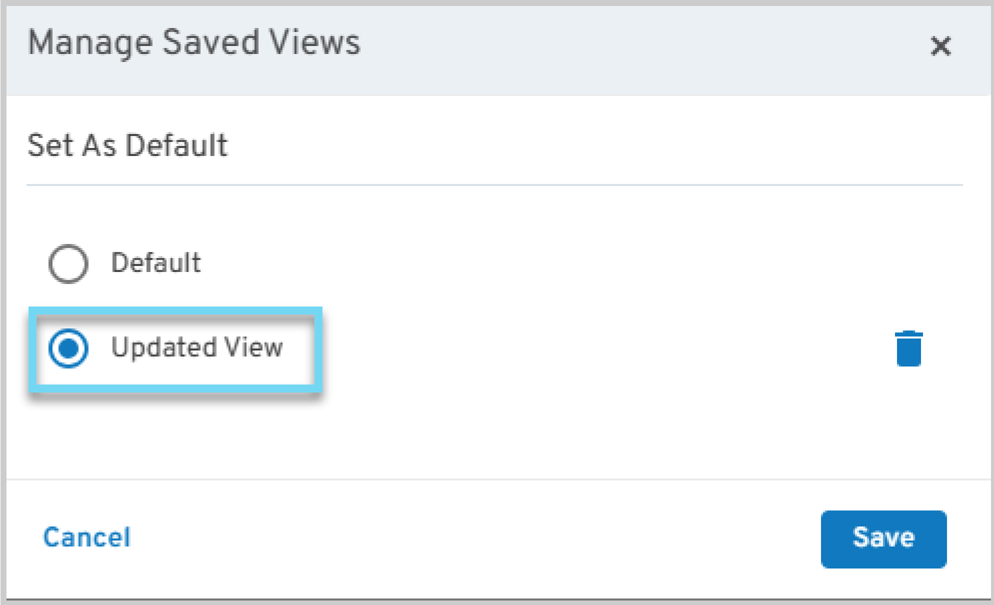
3.3.3. Managing the Saved Views

Perform the following steps to manage the saved views:

1. Click on the **Manage Views** icon.
2. Click on the **Manage Saved Views**.



3. Select the required view on the **Manage Saved Views** pop-up window.



4. Users can choose the following actions on the **Manage Saved Views** pop-up window.

Note:

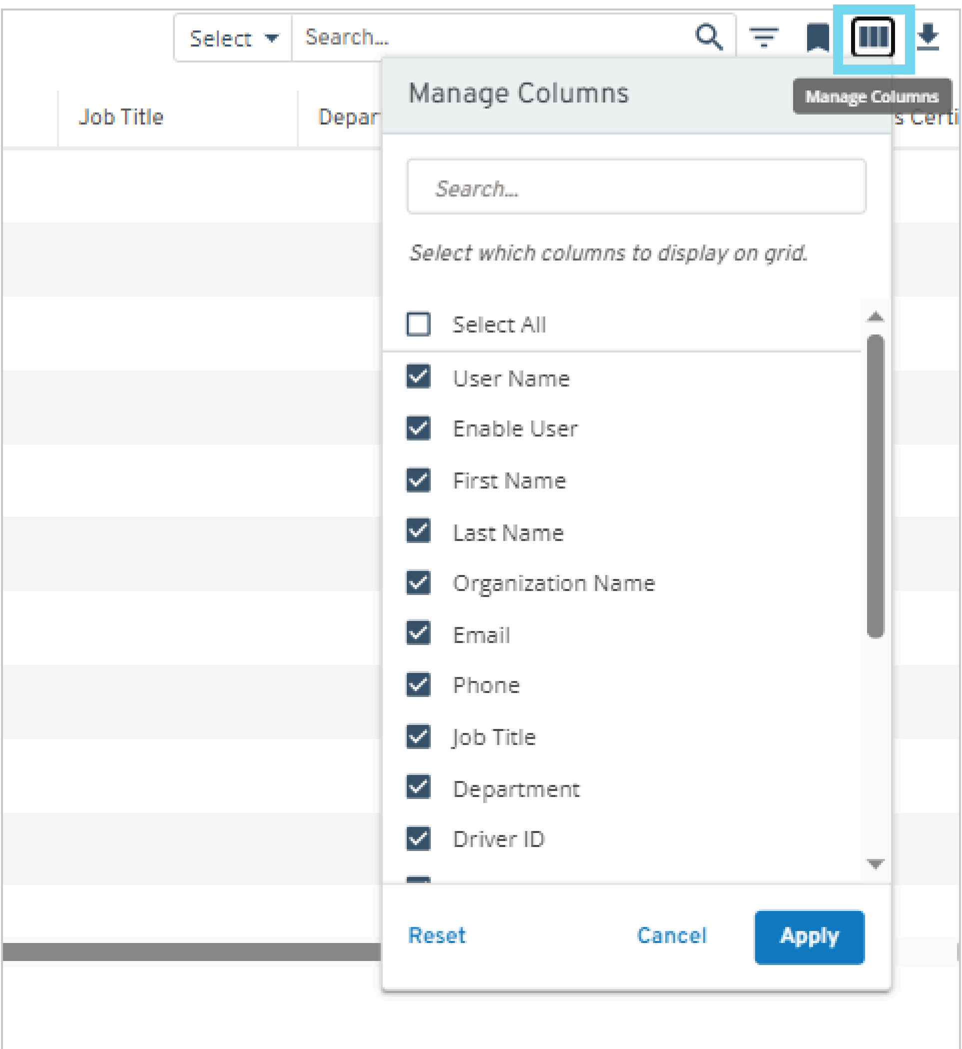
- **Deafult-** Choose the required view to set it as default view.
- Delete-Click on **Delete** icon to delete the view.

3.4. Navigating to Manage Columns

Users can use the **Manage Columns** to add or remove columns and look up information pertaining to the chosen criteria.

Perform the following steps to add/remove columns

1. Click on the **Manage Columns**.
2. The drop-down menu with respect to various columns is displayed.



3. Tick/untick the box of the respective column that needs to be displayed/removed.
4. Click on the **Apply** button.

The respective column is displayed/removed on the page.

Email	Created Date	Updated Date	Phone
varsha.nilelsp@yopmail.com	Fri Mar 24 2023	Fri Sep 01 2023	
maseeha.nileshipper@yo...	Fri Mar 24 2023	Fri Sep 01 2023	
ameya.nileshipper@yopm...	Fri Mar 24 2023	Fri Sep 01 2023	
malini.nileshipper@yopm...	Fri Mar 24 2023	Fri Sep 01 2023	
Supreeth.nileship@yopma...	Fri Mar 24 2023	Thu Aug 31 2023	
deepti.nileshipper@yopm...	Fri Mar 24 2023	Thu Aug 31 2023	
sowmya.shree@yopmail.c...	Mon Mar 27 2023	Wed Aug 30 2023	
geethashree.nileship@yo...	Fri Mar 24 2023	Wed Aug 30 2023	
ravikrishna.dhavalikar@y...	Mon Mar 27 2023	Wed Aug 30 2023	
gpqa@yopmail.com	Mon Aug 28 2023	Tue Aug 29 2023	

3.5. Downloading Information in the Excel format

Users can download the information available on the view in the Excel format.

Perform the following steps to download the information:

1. Tick the required box next to the **User Name** column.

0 Selected Archive Email Password Select Search...

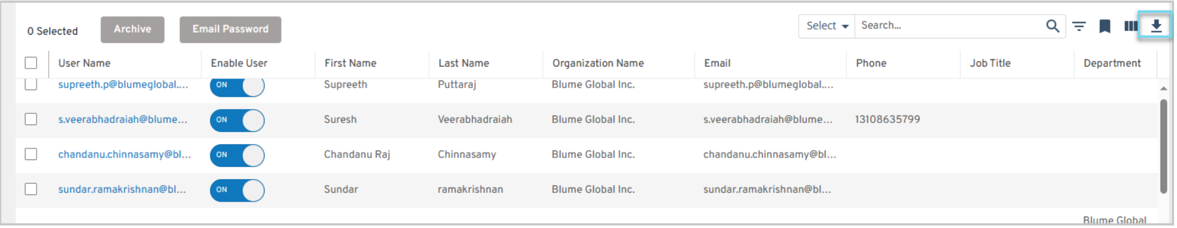
	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title
☐	supreeth.p@blumeglobal....	ON	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal....		
☐	s.veerabhadraiah@blume...	ON	Suresh	Veerabhadraiah	Blume Global Inc.	s.veerabhadraiah@blume...	13108635799	
☐	chandanu.chinnasamy@bl...	ON	Chandanu Raj	Chinnasamy	Blume Global Inc.	chandanu.chinnasamy@bl...		
☐	sundar.ramakrishnan@bl...	ON	Sundar	ramakrishnan	Blume Global Inc.	sundar.ramakrishnan@bl...		
☐	glenn.liza@blumeglobal.c...	ON	Glenn	Liza	Blume Global Inc.	glenn.liza@blumeglobal.c...	8374197270	System Administrator

BLUME global
WISETECH GLOBAL GROUP

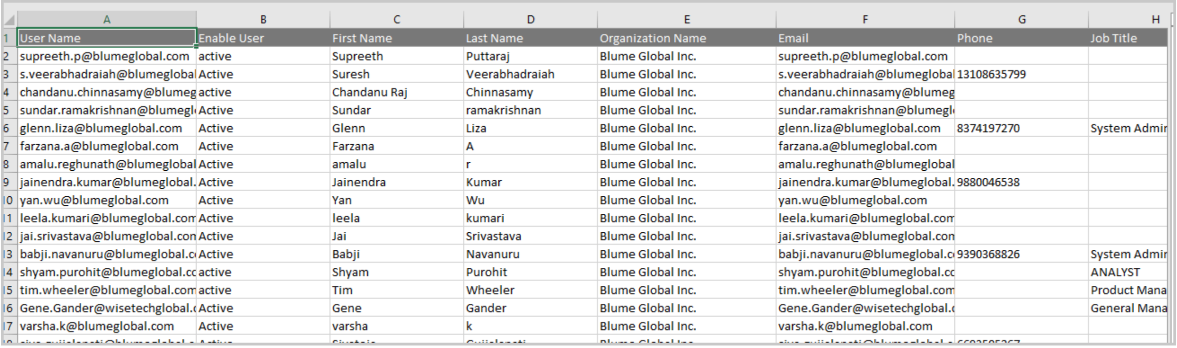
cargowise learning

Note: Users can select one or multiple items for downloading.

2. Click on the **Download** icon.



An excel file is downloaded in the respective user's device.



	A	B	C	D	E	F	G	H
1	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title
2	supreeth.p@blumeglobal.com	active	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal.com		
3	s.veerabhadraiah@blumeglobal	Active	Suresh	Veerabhadraiah	Blume Global Inc.	s.veerabhadraiah@blumeglobal	13108635799	
4	chandanu.chinnasamy@blumeg	active	Chandanu Raj	Chinnasamy	Blume Global Inc.	chandanu.chinnasamy@blumeg		
5	sundar.ramakrishnan@blumegl	Active	Sundar	ramakrishnan	Blume Global Inc.	sundar.ramakrishnan@blumegl		
6	glenn.liza@blumeglobal.com	Active	Glenn	Liza	Blume Global Inc.	glenn.liza@blumeglobal.com	8374197270	System Admir
7	farzana.a@blumeglobal.com	Active	Farzana	A	Blume Global Inc.	farzana.a@blumeglobal.com		
8	amalu.reghunath@blumeglobal	Active	amalu	r	Blume Global Inc.	amalu.reghunath@blumeglobal		
9	jainendra.kumar@blumeglobal.	Active	Jainendra	Kumar	Blume Global Inc.	jainendra.kumar@blumeglobal.	9880046538	
10	yan.wu@blumeglobal.com	Active	Yan	Wu	Blume Global Inc.	yan.wu@blumeglobal.com		
11	leela.kumari@blumeglobal.com	Active	leela	kumari	Blume Global Inc.	leela.kumari@blumeglobal.com		
12	jai.srivastava@blumeglobal.con	Active	Jai	Srivastava	Blume Global Inc.	jai.srivastava@blumeglobal.con		
13	babji.navanuru@blumeglobal.c	Active	Babji	Navanuru	Blume Global Inc.	babji.navanuru@blumeglobal.c	9390368826	System Admir
14	shyam.purohit@blumeglobal.cc	active	Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglobal.cc		ANALYST
15	tim.wheeler@blumeglobal.com	active	Tim	Wheeler	Blume Global Inc.	tim.wheeler@blumeglobal.com		Product Mana
16	Gene.Gander@wisetechglobal.c	Active	Gene	Gander	Blume Global Inc.	Gene.Gander@wisetechglobal.c		General Mana
17	varsha.k@blumeglobal.com	Active	varsha	k	Blume Global Inc.	varsha.k@blumeglobal.com		

4. Manage Divisions

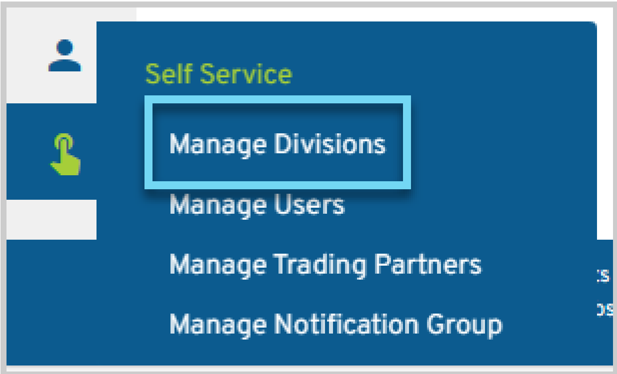
Manage Divisions is a pivotal feature within **Self Service**,designed to empower users with real-time access to crucial organizational information. Users actively navigate through a comprehensive interface, gaining visibility into key details such as organization name, division name, state, city, and specific codes that define each division.In the the **Self Service** solution, under **Manage Divisions** users can perform the task of **Viewing a Division**.

4.1. Viewing a Division

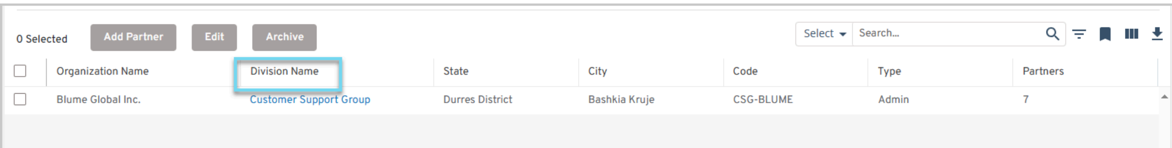
Users can view division details such as the **SCAC Code**, **Tax ID**, **Organization Type**, and other important details.

Perform the following steps to view a division:

1. Navigate to **Self Service > Manage Divisions**.



2. Click on the required **Division Name** in the **Manage Divisions** page.



3. Users can view the following information in the **Divisions Details** page:

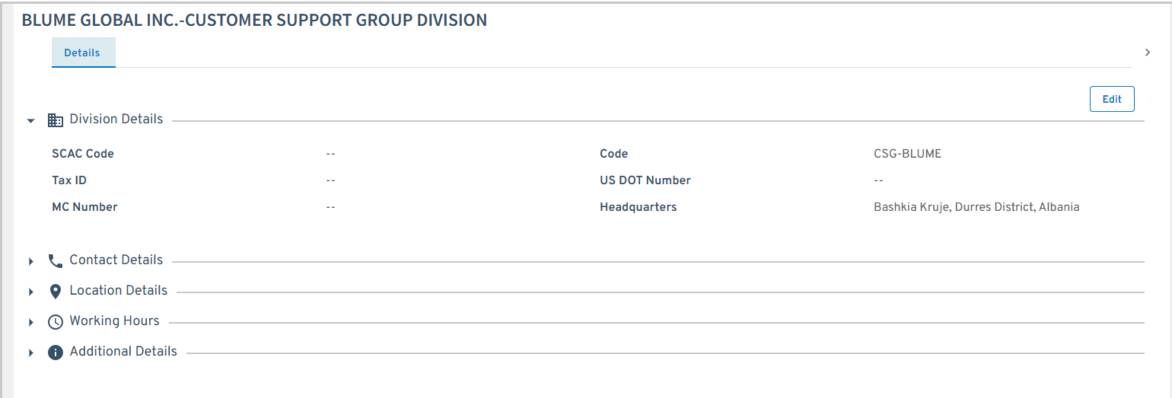


Table 1. Division Details Field and Description Table

Fields	Description
SCAC Code	The Standard Carrier Alpha Code that is associated with the division.
Code	The code associated with the division.
Headquarters	The headquarters of the division.
# of Partners	The number of trading partners that are associated with the division.
Organization Type	The type of organization that the division is associated.
Tax ID	The tax ID of the division.
Time Zone	The time zone of the division.
Self-Leased Chassis	The division's self-leased chassis status

5. Manage Users

On the **Self Service** solution, Manage Users involves the following tasks:

- Adding a Person *(on page 26)*
- Viewing or Updating User Details *(on page 30)*
- Deleting a User *(on page 32)*
- Emailing the Password *(on page 33)*

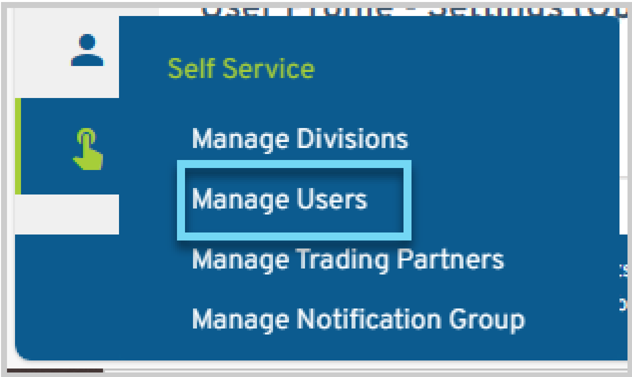
Note: For additional details on Creating Users and Working on common Administrative Tasks view the Video Tutorials *(on page 34)*.

5.1. Adding a Person

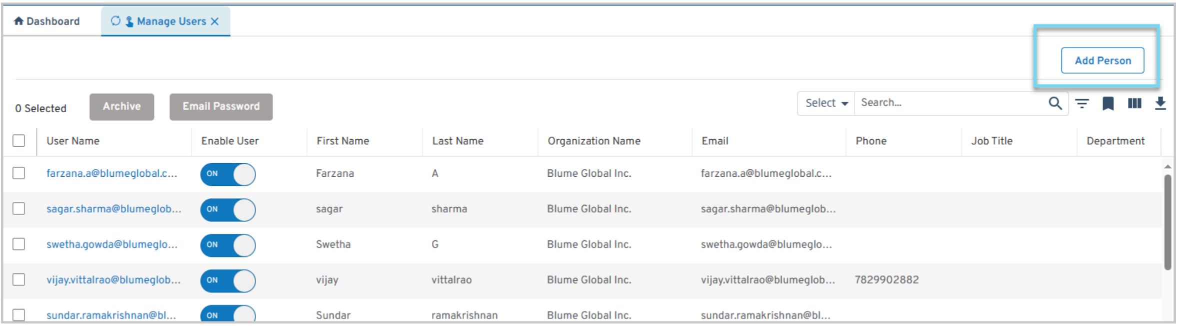
Users can add a person by navigating to the **Manage Users** tab.

Perform the following steps to add a person:

1. Navigate to **Self Service** solution in the left navigation menu.
2. Click on **Manage Users**.



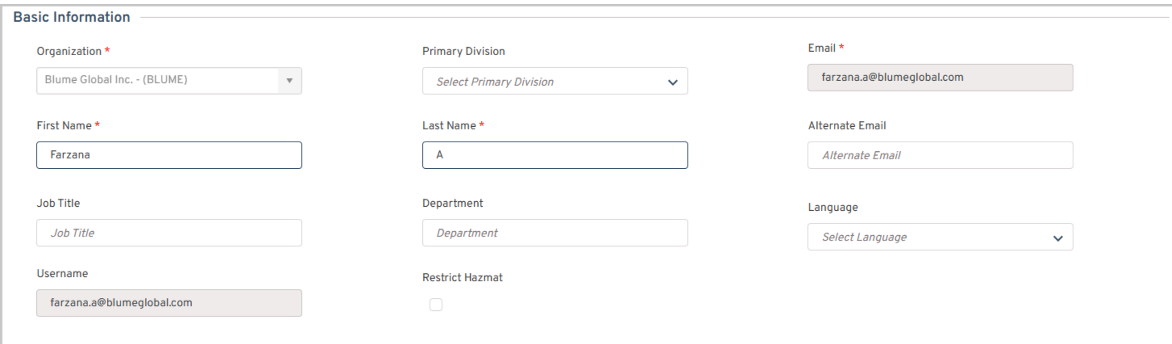
3. Click on the **Add Person** button in the **Manage Users**.



4. Enter the required information for the following attributes in the **Basic Information** section.

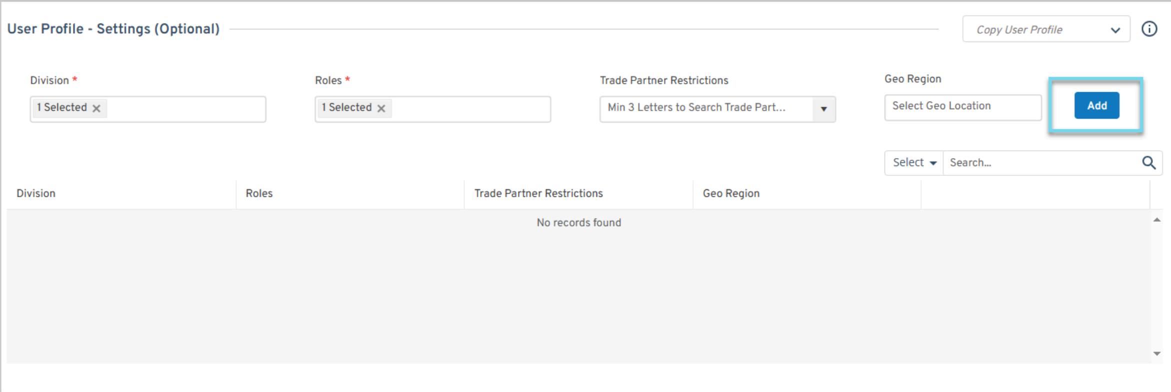
Table 2. Basic Information Field and Description Table

Fields	Description
First Name	The first name of the user.
Last Name	The last name of the user.
Email Address	The email address of the user.
Job Title	The job title of the user.
Department	The department of the user.
Alternate Email Address	The alternate email address of the user.
Primary Division	The primary division of the user.
Language	The language of the user.



Note: Fields that are marked with a red "*" are mandatory.

5. Click on the **Add** button on the expanded **User Profile – Settings** section.



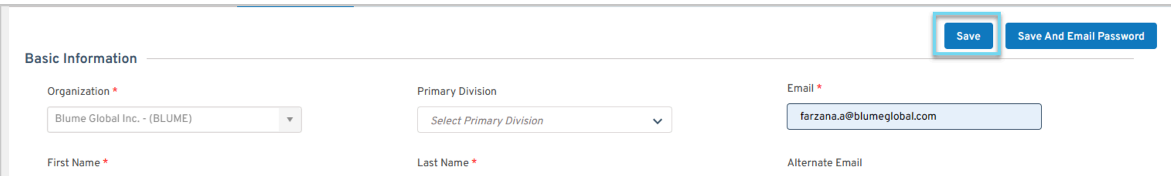
6. Enter the required information for the following fields in the **Add User Profile** pop-up window:

Table 3. Add User Profile Fields and Descriptions Table

Field	Description
Division	The division with which the user is to be associated.
Roles	The roles to be added to the user profile.
Trade Partner Restrictions	The required trading partners to be restricted for the user.
Geo Region	The geographical region to which the user belongs.

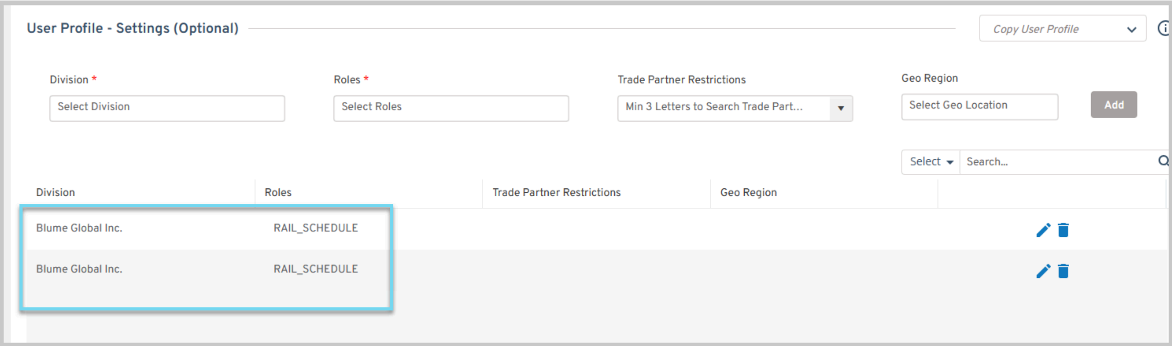
Note: Users can tick multiple divisions at once without having to make separate searches or selections.

7. Click on the **Save** button.



Note: Users can also click on the **Save and Email Password** to receive a password via email.

The user profile details is added under the **User Profile – Settings (Optional)** section.



8. Scroll down to enter the following information for the required fields in the **Additional Information (Optional)** section.

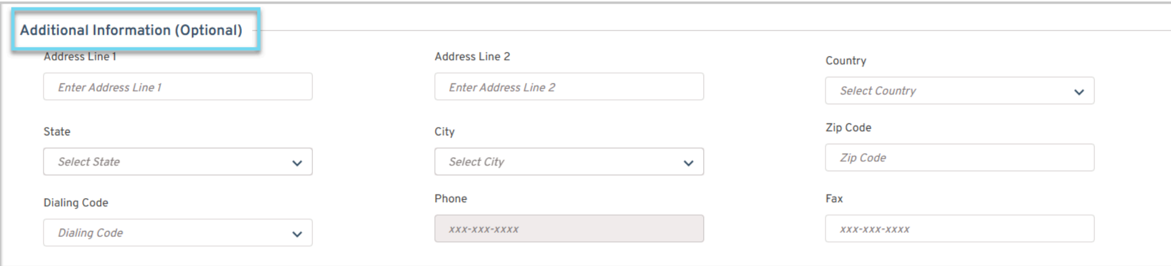
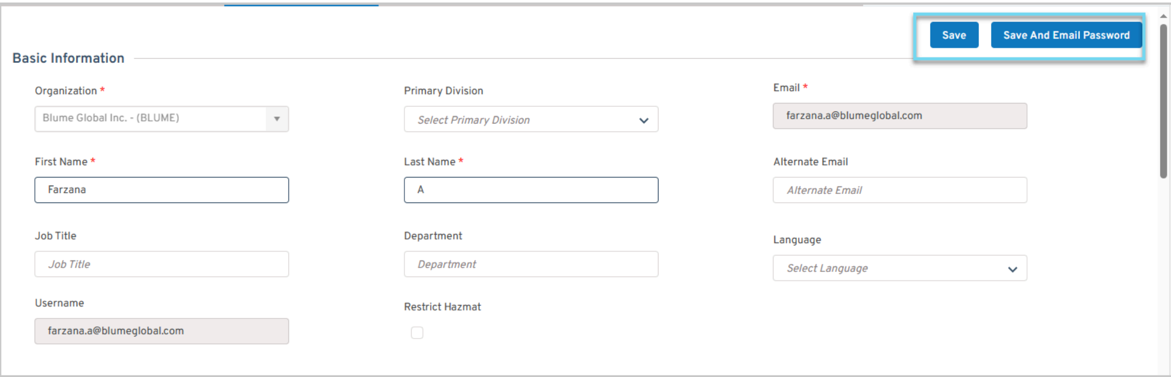


Table 4. Additional Information (Optional) Fields and Descriptions Table

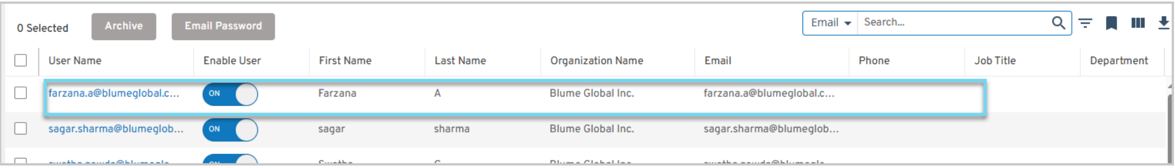
Field	Description
Address Line 1	Line one of the address of the user.
Address Line 2	Line two of the address of the user.
Country	The country the user is situated.
State	The state the user is situated.
City	The city the user is situated.
Zip Code	The zip code the user is situated.
Dialing Code	The telephone dialing code of the country the user is situated.
Phone #	The telephone number of the user.
Fax	The fax number of the user.

9. Click on the **Save** button.

> **Note:** Click on the **Save And Email Password** button to save the updates and email the password to the user.



The user is created and listed.

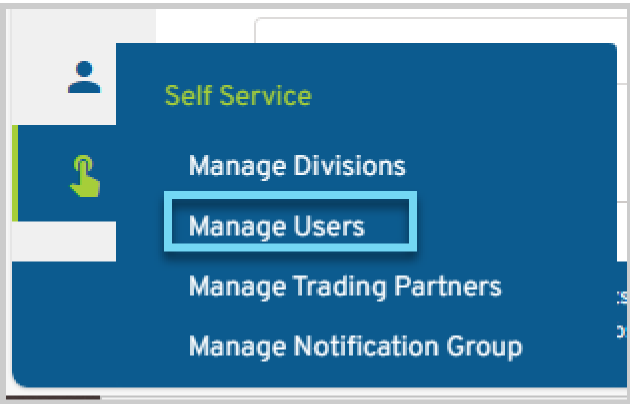


5.2. Viewing or Updating User Details

Users can view or update user details such as the **Basic Information**, **User Profile – Settings (Optional)** and **Additional Information (Optional)** sections from the **Update User Details** page.

Perform the following steps to view or update user details:

1. Navigate to **Self Service > Manage Users**.

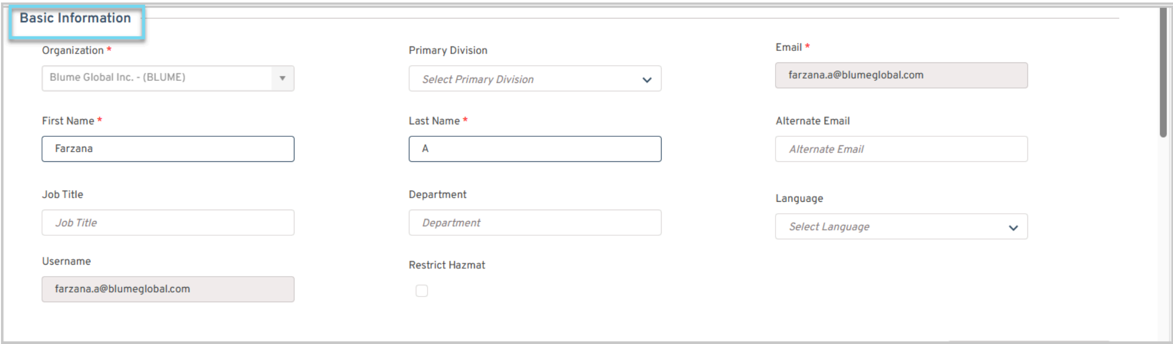


2. Click on the **Username** button in **Manage Users** .

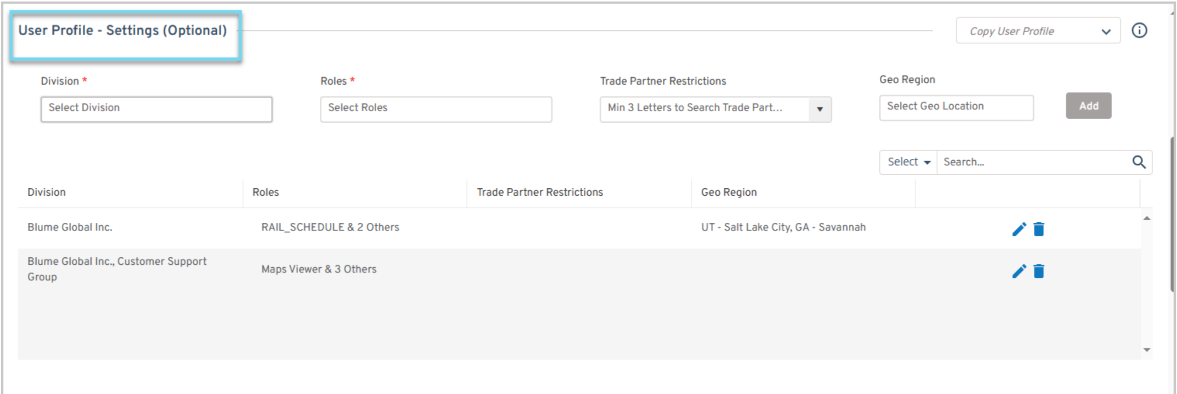
> **Note:** Click on Table 2: Basic Information Field and Description Table *(on page 27)* for further details related to **Basic Information** section.

The user details can be viewed across the following sections:

Basic Information

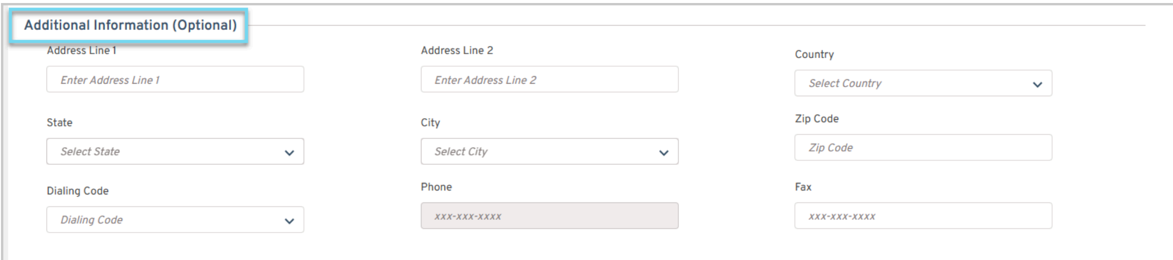


User Profile – Settings (Optional)

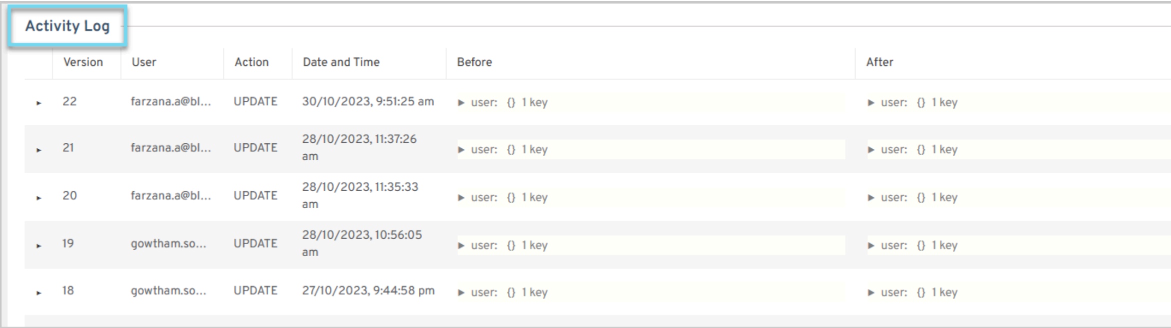


Click on Table 4: Additional Information (Optional) Fields and Descriptions Table *(on page 29)* for further details related to **Additional Information (Optional)** section.

Additional Information (Optional)

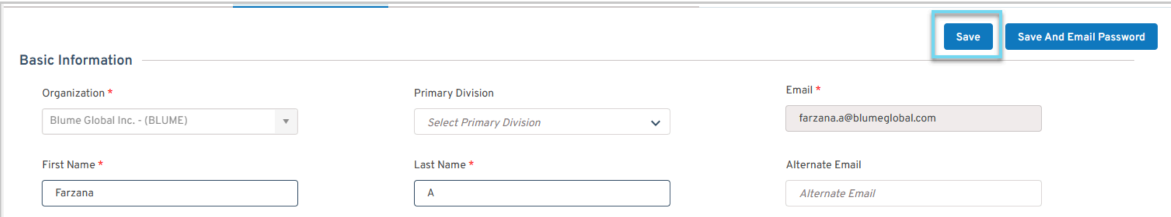


Note: Users can also view the **Activity Log**.



3. Proceed to update the required sections across the **Basic Information**, **User Profile – Settings (Optional)** and **Additional Information (Optional)** section.

4. Click on the **Save** button.

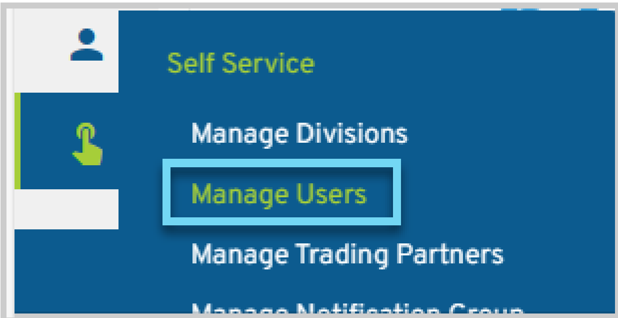


5.3. Deleting a User

Users can delete user profiles that are no longer active in a division from **Manage Users**.

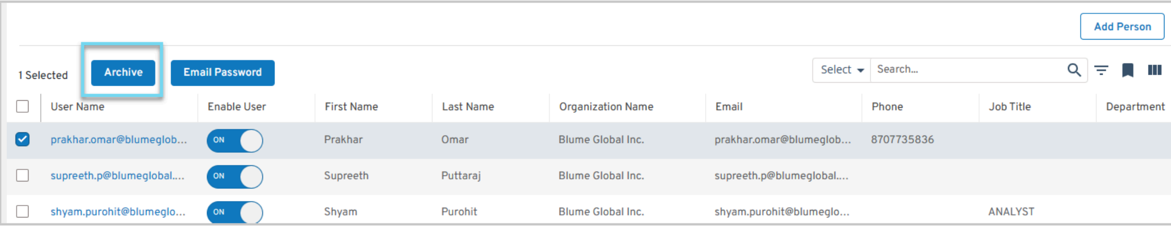
Perform the following steps to delete a user:

1. Navigate to **Self Service > Manage Users** .

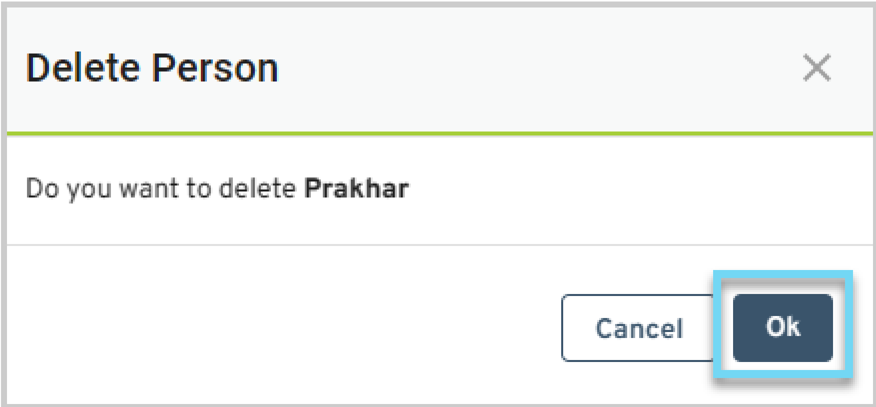


2. Tick the required box next to the **User Name** column.

3. Click on the **Archive** button.

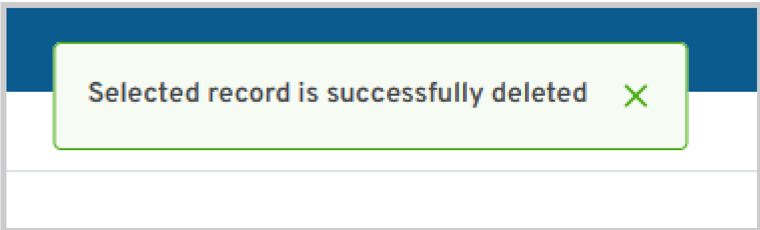


4. Click on the **OK** button on the **Delete Person** pop-up window.



Note: Click on the **Cancel** button to go back to the **Manage Users** page.

The selected user profile is deleted.



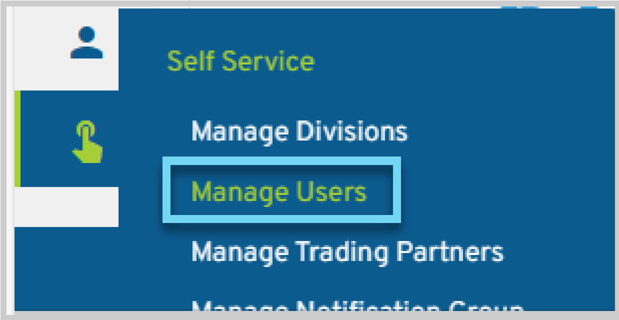
Note: Users with fewer divisions in their access permissions are restricted from deleting or editing other users who have access to a greater number of divisions than they do.

5.4. Emailing the Password

When users have forgotten the password user administrators can leverage the **Self Service** solution to email the password to the user.

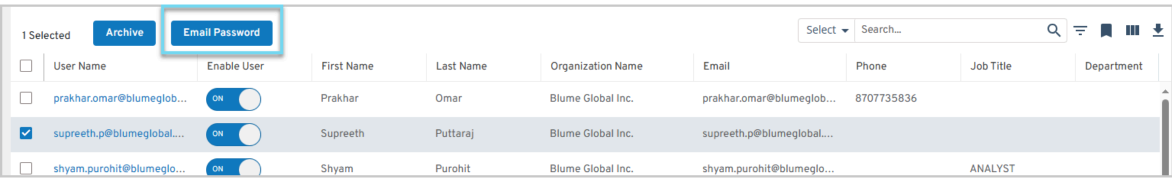
Perform the following steps to email the password to a user:

1. Navigate to **Self Service > Manage Users**.

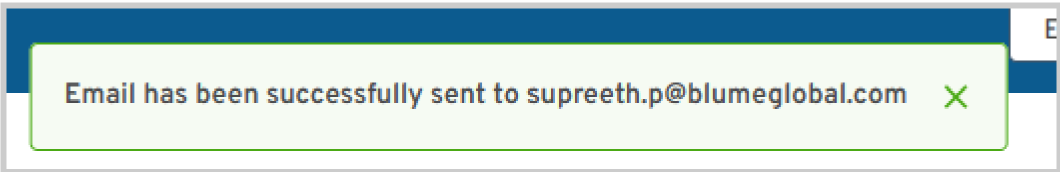


2. Tick the required box next to the **User Name** column.

3. Click on the **Email Password** button.



An email is sent to the selected user profile.



5.5. Video Tutorials

This section contains video tutorials for the **Digital Operating Platform** solution.

Table 5.

Topic	Description	Video Link
Creating Users	This video tutorial provides step by step procedure for Creating Users	Link
Working on common Administrative Tasks	This video tutorial provides step by step procedure	Link

Table 5. (continued)

Topic	Description	Video Link
	regarding the common administrative tasks.	

6. Manage Trading Partners

The following tasks can be viewed in the **Manage Trading Partners** section in the **Self Service** solution:

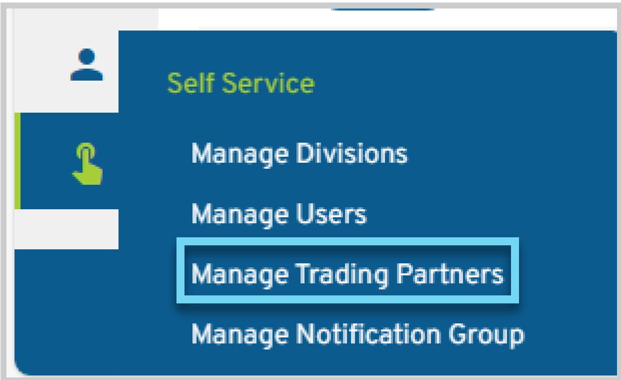
- Viewing Trading Partners *(on page 36)*
- Requesting/Inviting a Partner *(on page 37)*
- Adding users to Customer Portal *(on page 40)*
- Viewing Request or Invites *(on page 41)*
- Bulk Upload for Inviting/Sending Partnership Requests *(on page 43)*

6.1. Viewing Trading Partners

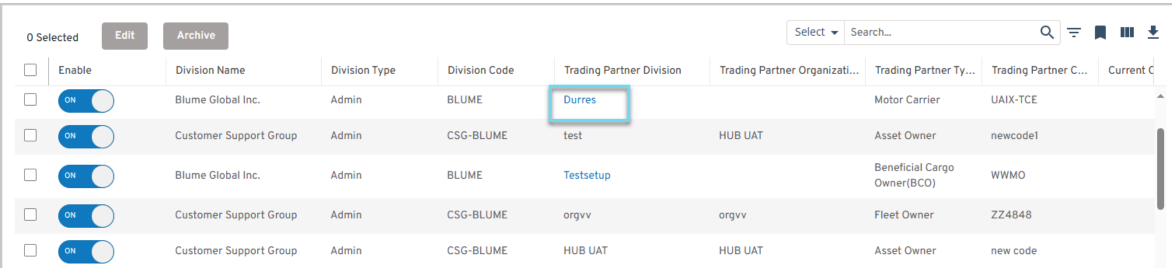
Users can view trading partner details such as the insurance details, contact information and other important details from the **Partner Details** page.

Perform the following steps to view trading partner details:

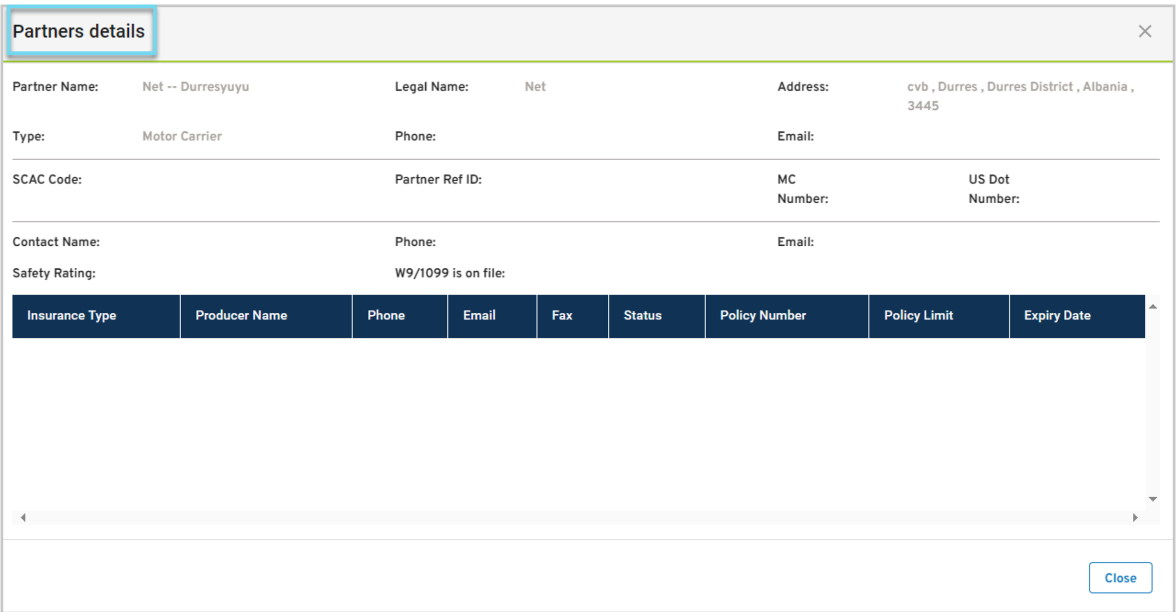
1. Navigate to **Self Service** > **Manage Trading Partners**.



2. Click on the required **Trading Partner Division** of your requirement.



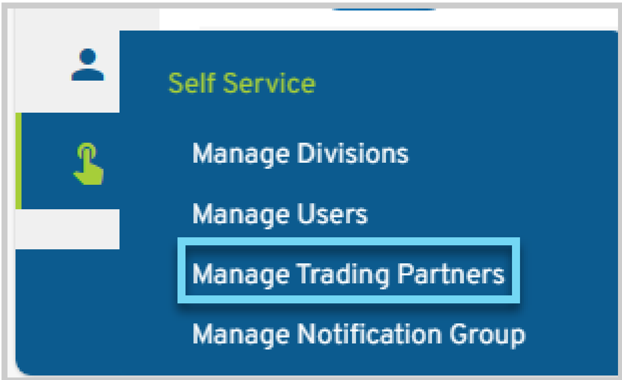
The trading partner details are available on the **Partners Details** pop-up window:



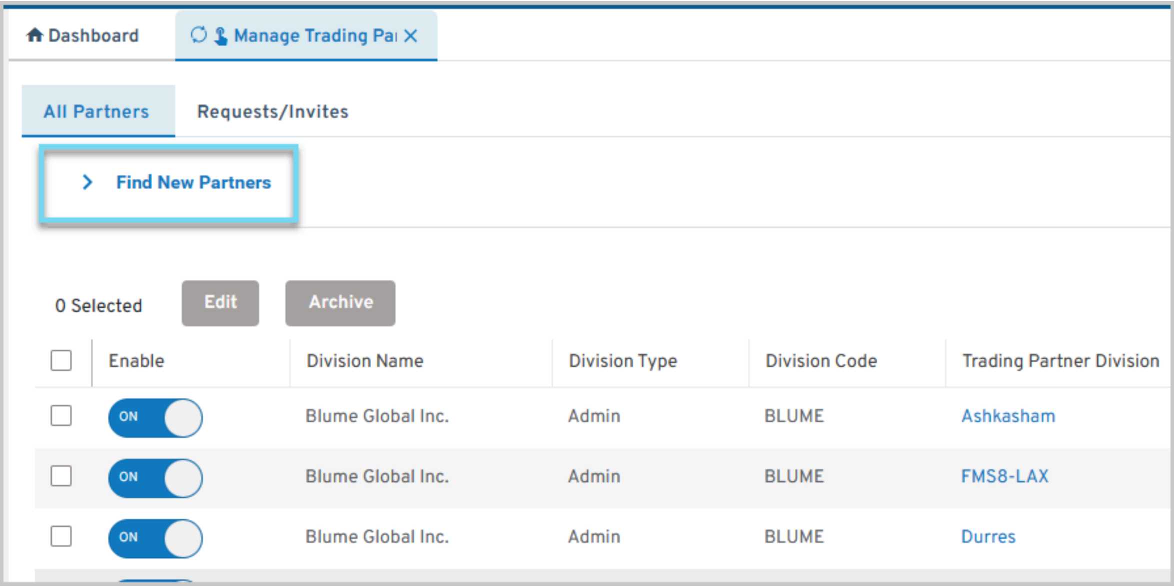
6.2. Requesting/Inviting a Partner

Users can Invite or Request a partner in the **Manage Trading Partners** section. Users can invite a partner by navigating to the **Find New Partners** panel under **Manage Trading Partners.**

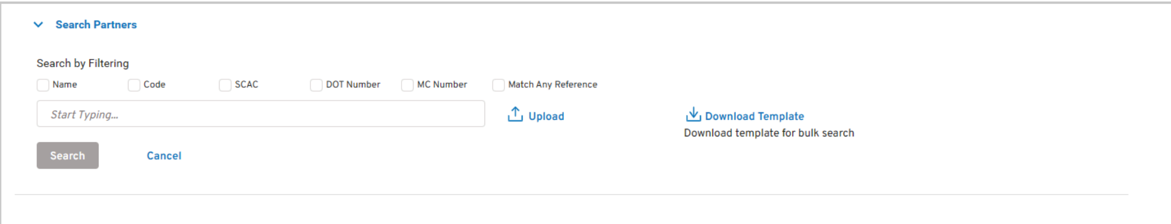
1. Navigate to **Self Service > Manage Trading Partners**.



2. Click on the **Find New Partners** panel in the **Manage Trading Partners** page.

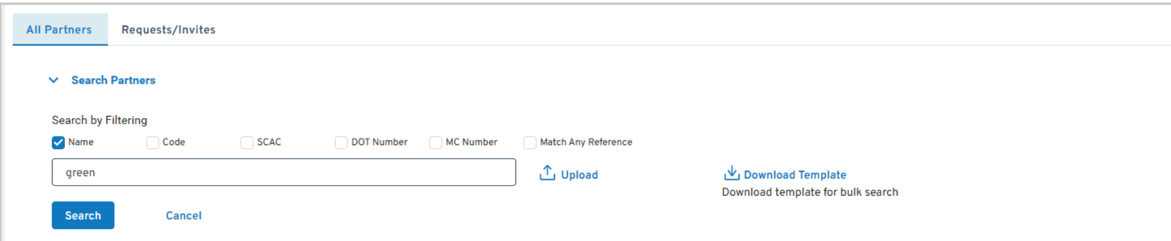


3. Tick the required box to filter and view a specific partner.



4. Enter the required information in the search field.

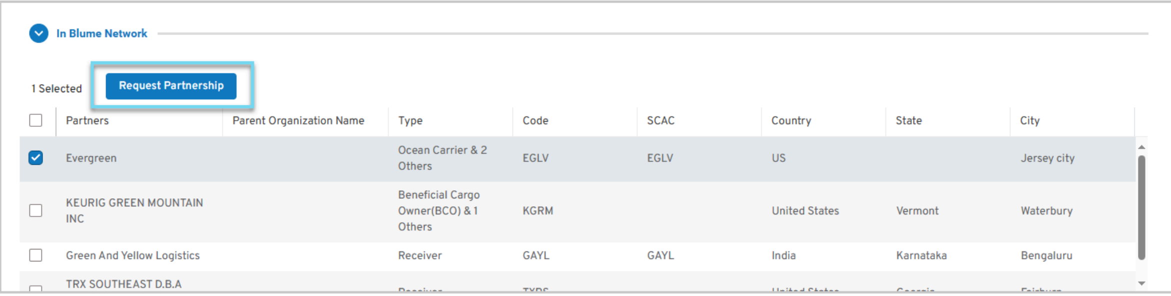
5. Click on the **Search** button.



Note: Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

6. Tick the required box next to the **Partners** column.

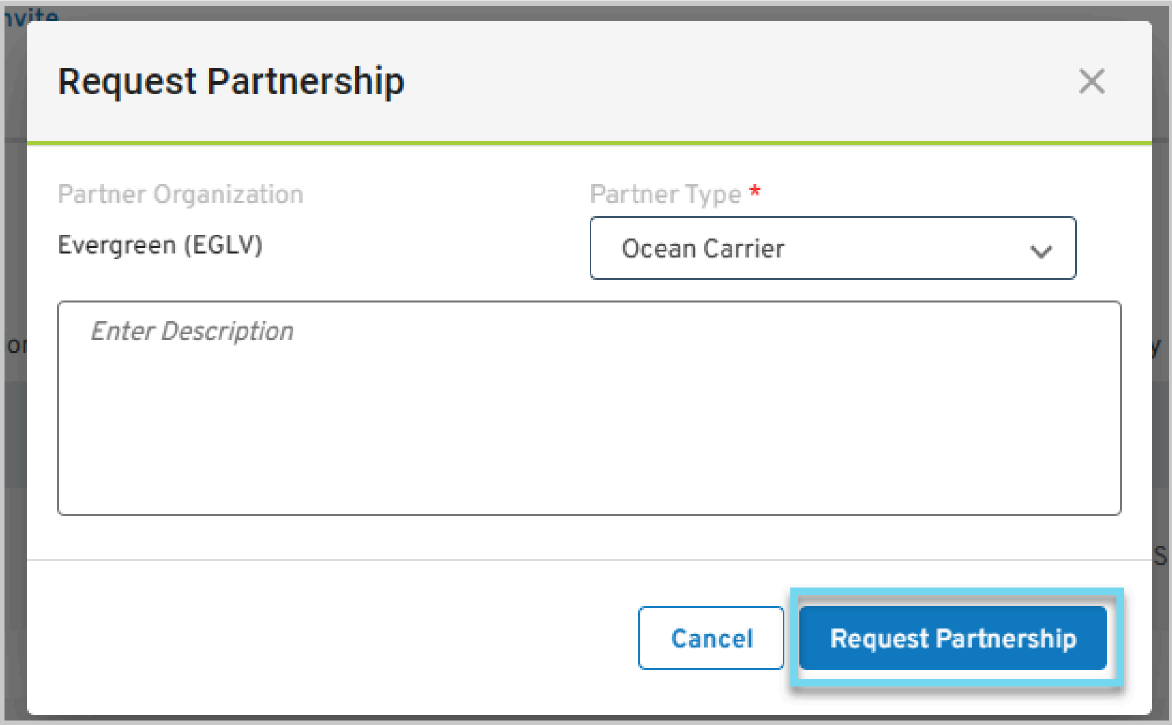
7. Click on the **Request Partnership** button.



8. Click on the **Partner Type**.

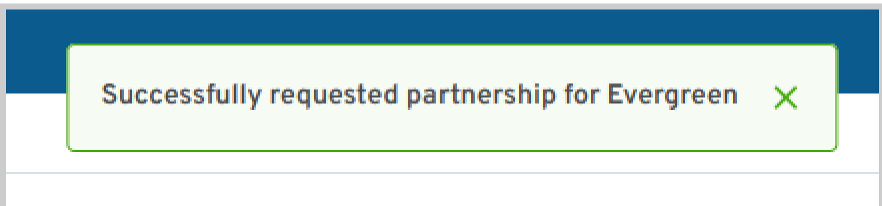
9. Enter the **Description** in the description field.

10. Click on **Request Partnership** button .

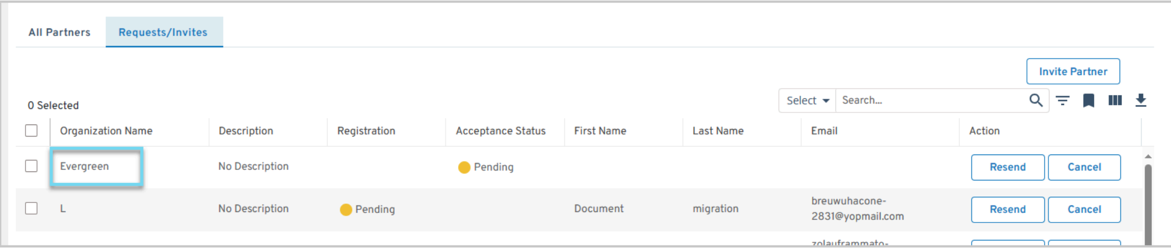


Note: Fields marked in * are mandatory. Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

A request for partnership is sent.



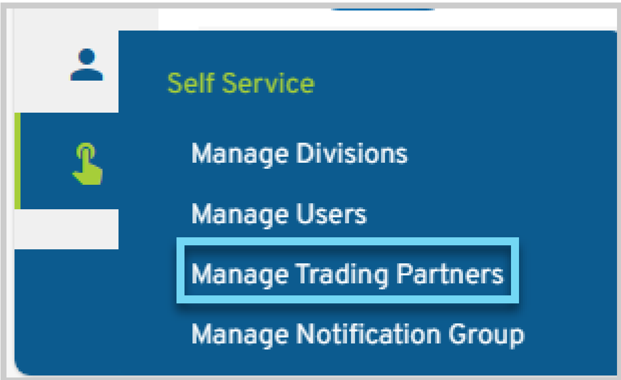
Navigate to **Requests/Invites** tab. The selected organization is displayed in the **Requests/Invites** tab.



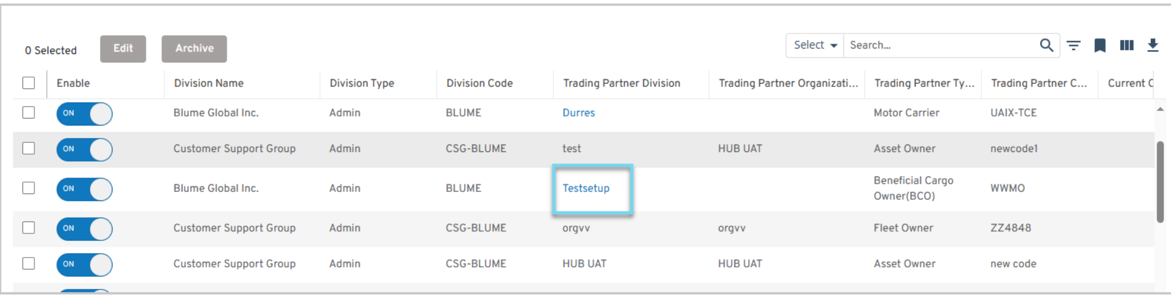
6.3. Adding users to Customer Portal

Users can invite other users when clicking on the **Trading Partner Division**. Perform the following steps to add an user to the customer portal:

1. Navigate to **Self Service > Manage Trading Partners**.

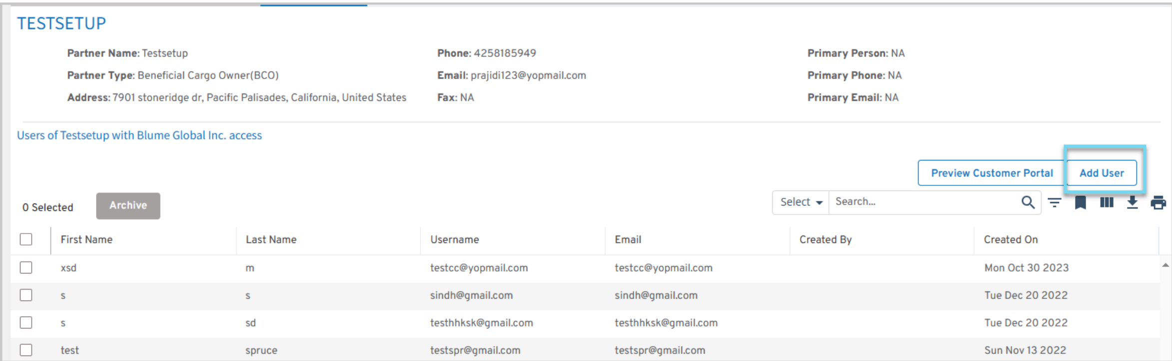


2. Click on the **Trading Partner Division** in the **Manage Trading Partners** page.



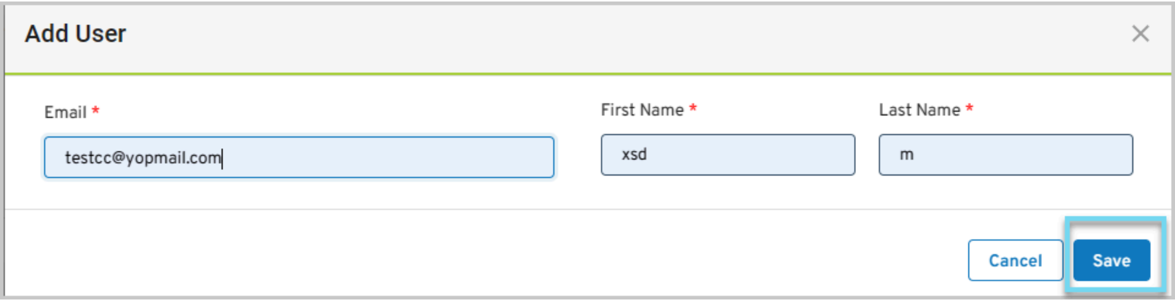
Note: Benefical Cargo Owners (BCO) can only be added as users.

3. Click on the **Add User** button.



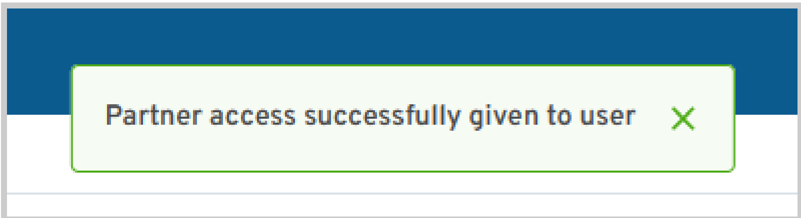
4. Enter the required information on the **Add User** pop-up window.

5. Click on the **Save** button.



Note: Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

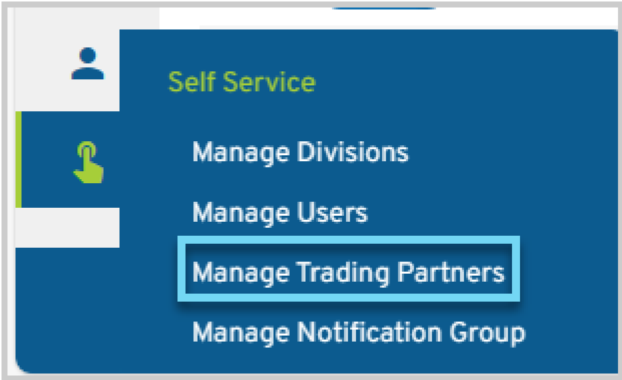
The user is provided with the partner access.



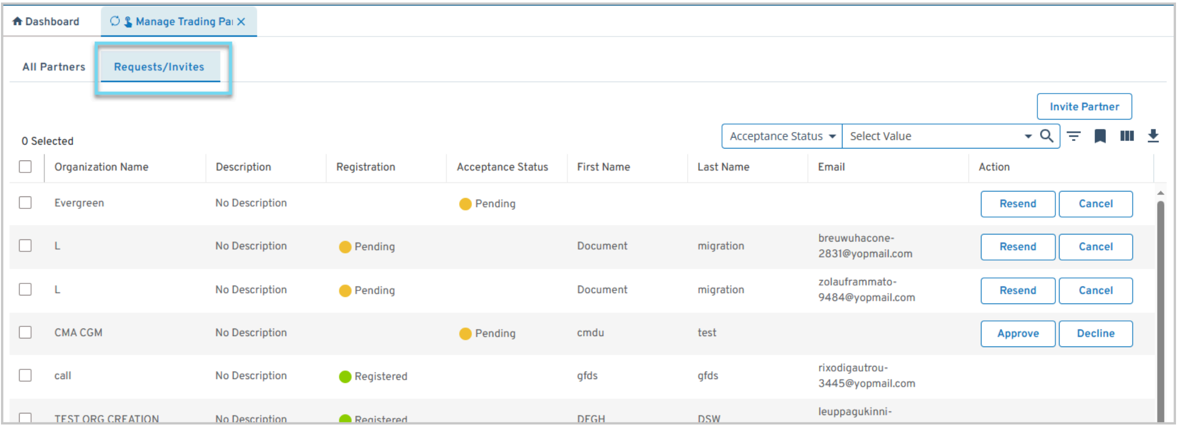
6.4. Viewing Request or Invites

Users can view the list of request and invites when filtering the option as per their choice.

1. Navigate to **Self Service > Manage Trading Partners**.



2. Click on the **Requests/Invites** tab.



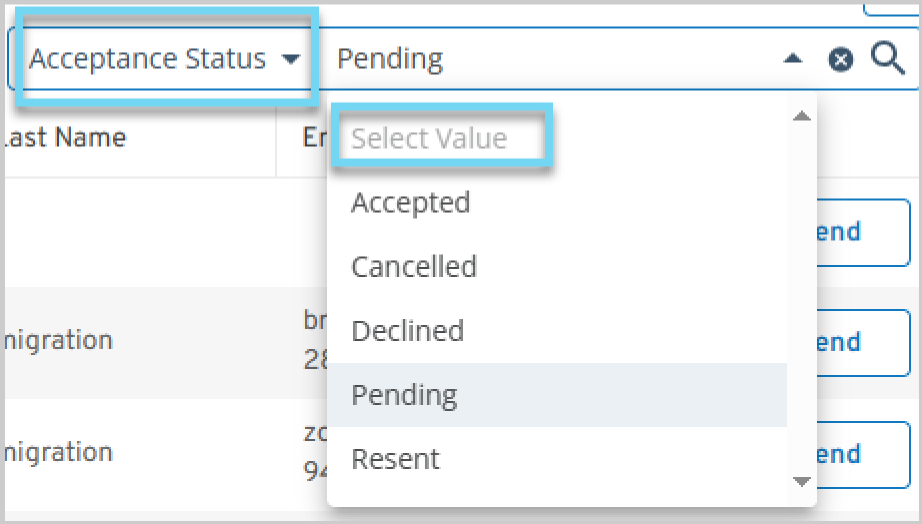
Note: The **Requests/Invites** tab contains a list of requests and invites sent along with their status.

3. Navigate to the Grid Toolbar.

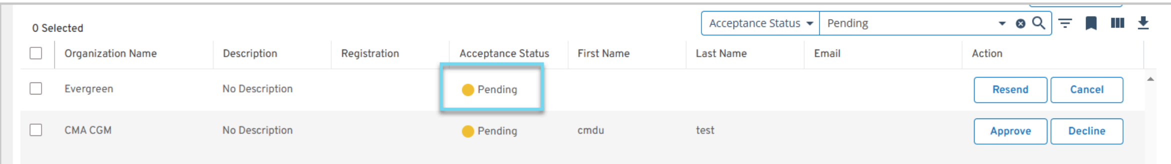
4. Click on the **Select** value drop-down list and select the required option.

5. Click on the **Acceptance Status**.

Note: The following options are available in the drop-down list.



6. Click on the **Search** icon.
   Users can view the status of the request sent.



6.5. Bulk Upload for Inviting/Sending Partnership Requests

Users can bulk upload the list of partners in the **Manage Trading Partners** page in the **All Partners** tab.

1. Navigate to **Self Service > Manage Trading Partners > Find New Partners**.

2. Click on the **Download Template** tab.

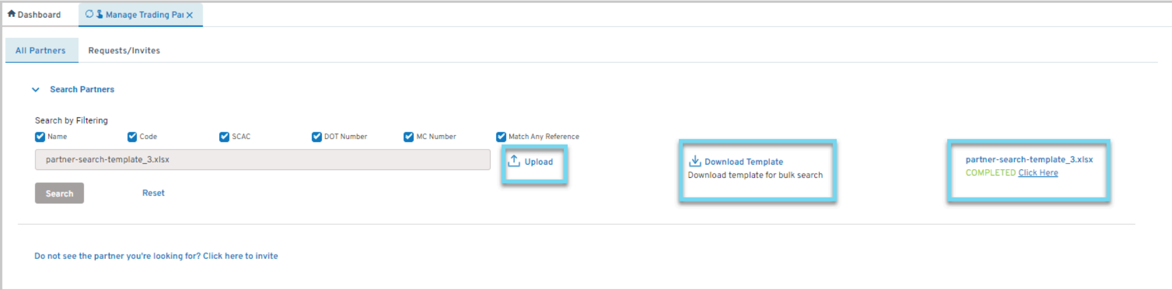
> **Note:** The data needs to be filled in the requirement format as per the template.

3. Click on the **Upload** tab.

4. Drag and drop the file or click on the blank space in the **Upload Partner Search Template** pop-up window.

5. Click on the **Upload** button.

Click on **Click Here** link and all entered data is displayed accordingly.



7. Manage Notification Group

In the **Self Service** solution, **Manage Notification Group** involves the following tasks:

- Adding a Notification Group *(on page 45)*

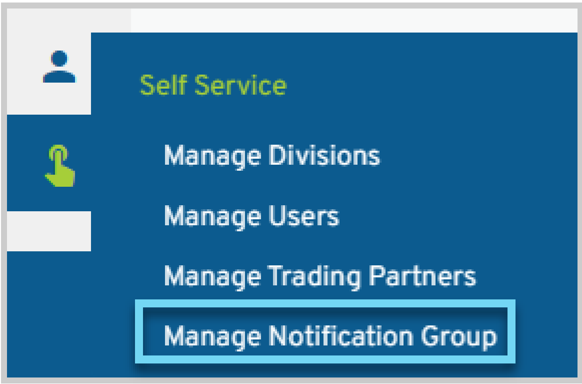
- Viewing and Editing Notification Groups *(on page 47)*

7.1. Adding a Notification Group

Users can create a notification group by navigating to the **Manage Notification Group** tab.

Perform the following steps to add a notification group:

1. Navigate to **Self Service > Manage Notification Group**.

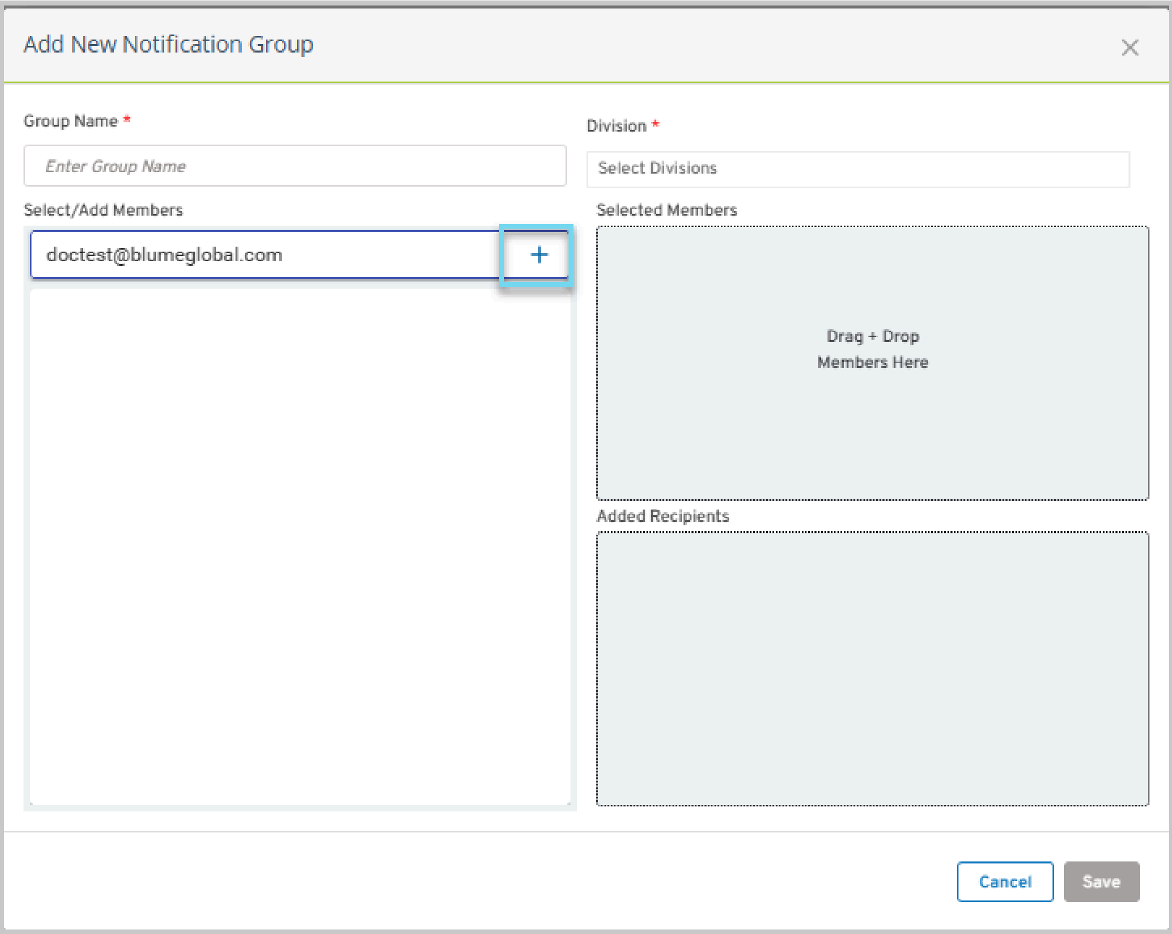


2. Enter the required **Group Name** in the **Add New Notification Group** page.

3. Enter the required **Division**.

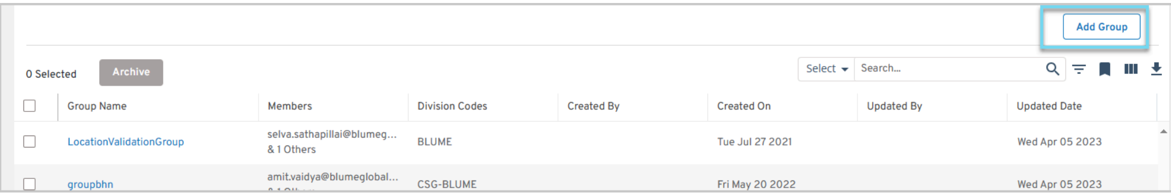
4. **Note:** Users can also add new members who are not part of the members list by entering the e-mail address in the Select/Add Members field and clicking on the + icon.

   Drag and drop the required members to the **Selected Members** list.



Note: Fields marked with * are mandatory.

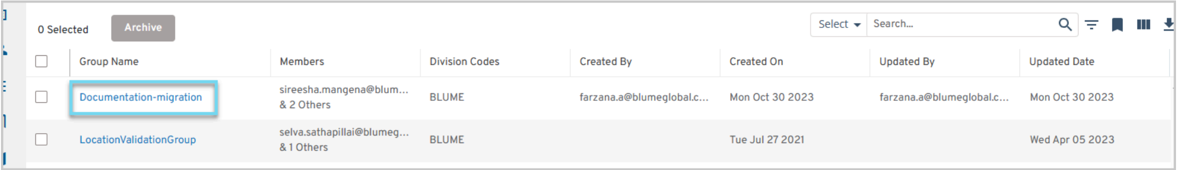
5. Click on the **Add Group** button in the **Manage Notification Group** page.



6. Click on the **Save** button.

Note: Click on the **Cancel** button to go back to the **Manage Notification Group** page

The notification group is created and is now listed on the **Manage Notification Groups**.

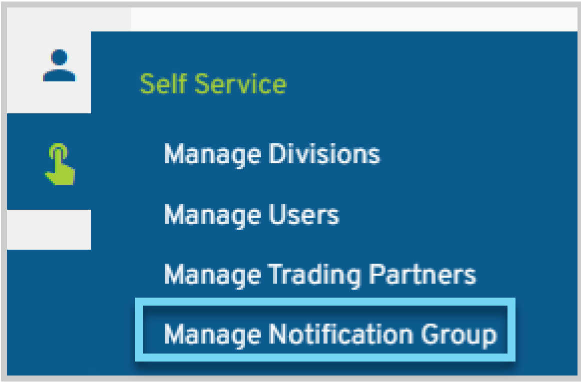


7.2. Viewing and Editing Notification Groups

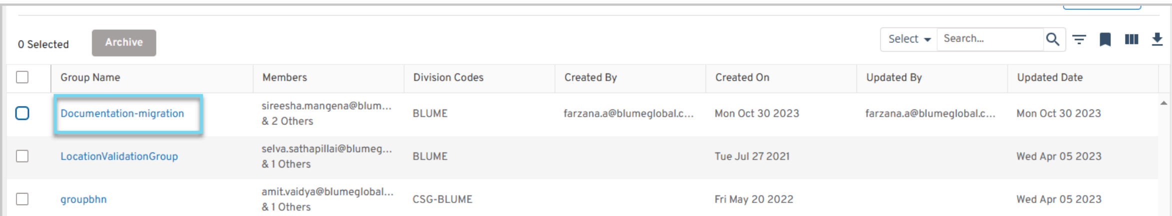
Users can view and edit notification group details such as the division, group members and other important details.

Perform the following steps to view and edit the notification groups:

1. Navigate to **Self Service > Manage Notification Group**.



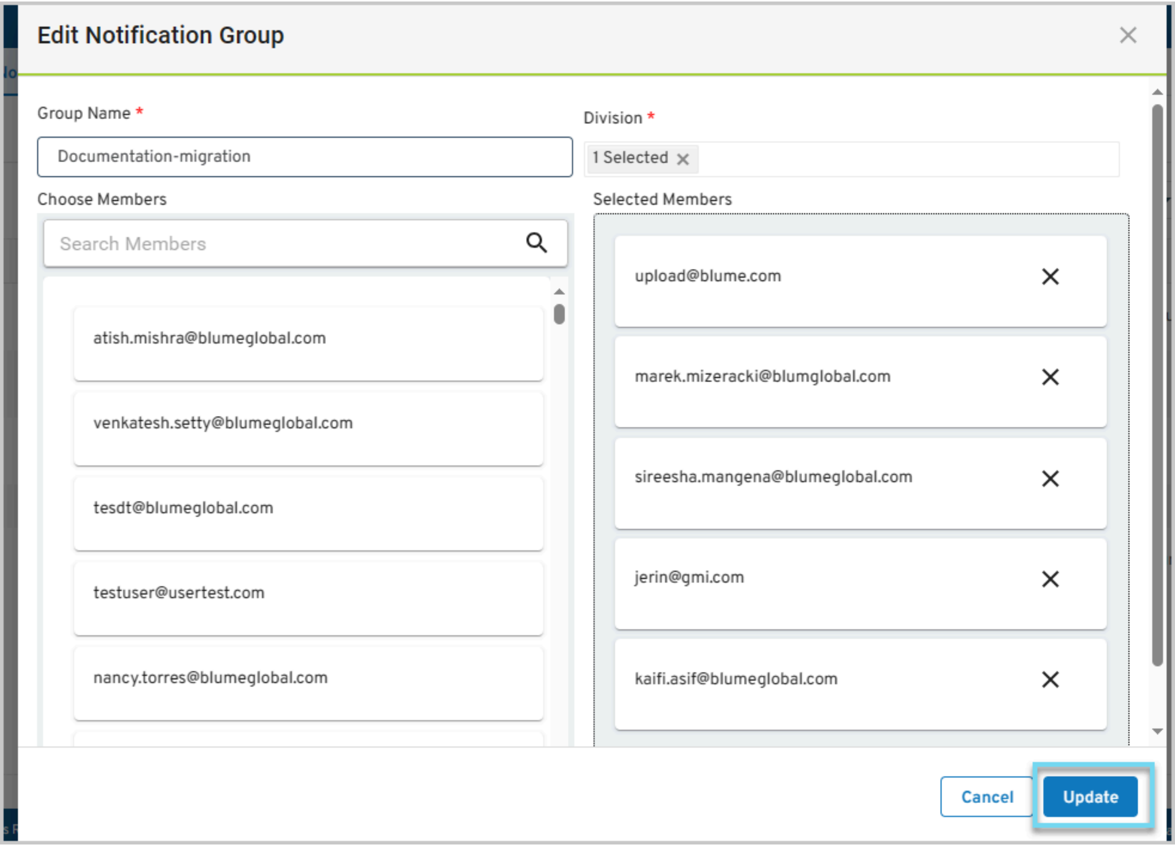
2. Click on the **Group Name** tab in the **Manage Notification Group** .



3. Enter the required details in the **Edit Notification Group** pop-up window.

> **Note:** All the fields marked with a red * are mandatory.

4. Click on the **Update** button.



Note: Click on the **Cancel** button to go back to the **Manage Notification Group** page.

A confirmation pop-up message displays on the page.