

4 Steps to Start Collaborating with Trading Partners Using Enable's Collaborator Feature



Given the disrupted state of today's supply chain, collaboration between trading partners is more important than ever. That's why Enable created Collaborator, a feature which gives trading partners and their collaborators the ability to work together on a single system even when only one trading partner is an Enable customer.

4 Steps for Customers

If you're an Enable customer, you should absolutely invite your trading partners onto the Collaborator portal. When you do, you'll both be able to easily:

- View and interact with all eligible trading programs
- Share insights obtained from Progress Tracker via Partner Dashboard
- Provide standardized information accessible via one central location
- Sign off on new or recurring deal plans
- Negotiate terms for deals about to expire

So, let's walk through how to get started with Collaborator.

Choose the supplier or customer with whom you want to collaborate

This happens offline. You and your key stakeholders should start by creating a shortlist of key business accounts for collaboration. These could be your most complex accounts and the ones that most need a streamlined, rebate management program—or they could be the accounts that are easiest to set up online. Either option, or any in between, is fine.

Next, go into the system and select the suppliers or customers you've chosen.

Manage permissions for collaborators

Determine what kind of access your collaborators will have. You can choose from:

- Sign-off access, meaning your collaborators can sign off on deals through the portal
- View access, meaning your collaborators can only view deals through the portal

Once you've chosen the type of access your partner will have, the supplier or customer will receive an invite from you to join them on the platform. You'll be able to see at a glance which invitations are still pending and which invitations are accepted.

Wait for your trading partner to create an account

After accepting your invitation, your trading partner creates an account. Once the supplier or customer has created their account, you become collaborators!

If you haven't already, be sure to let them know you're sending them this invitation, otherwise they may not know what to do with it when they receive it.

Collaborate!

Start working with your trading partner to achieve your goals. Don't forget: you can use Partner Dashboard to share your progress tracker with your Collaborator, giving them a view filtered just to their data.

Get in touch with your Customer Success Manager to get started with Collaborator.