InnerWorkings

Bacardi VALO
PurchasingManager
User Guide

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Introduction to VALO PurchasingManager

The VALO PurchasingManager solution from InnerWorkings is an order aggregation tool which allows users to interact within Buy Groups to forecast quantities of a defined product catalog to specified locations.

VALO PurchasingManager offers an easy to navigate online interface with real time updates within Buy Groups.

Using VALO PurchasingManager

When working with VALO PurchasingManager, you can:

- Access your PurchasingManager site

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Access Your PurchasingManager Site

To access the Bacardi VALO PurchasingManager site, navigate to https://bacardi.inwk.com. Provide your username (your email address) and password to log in.
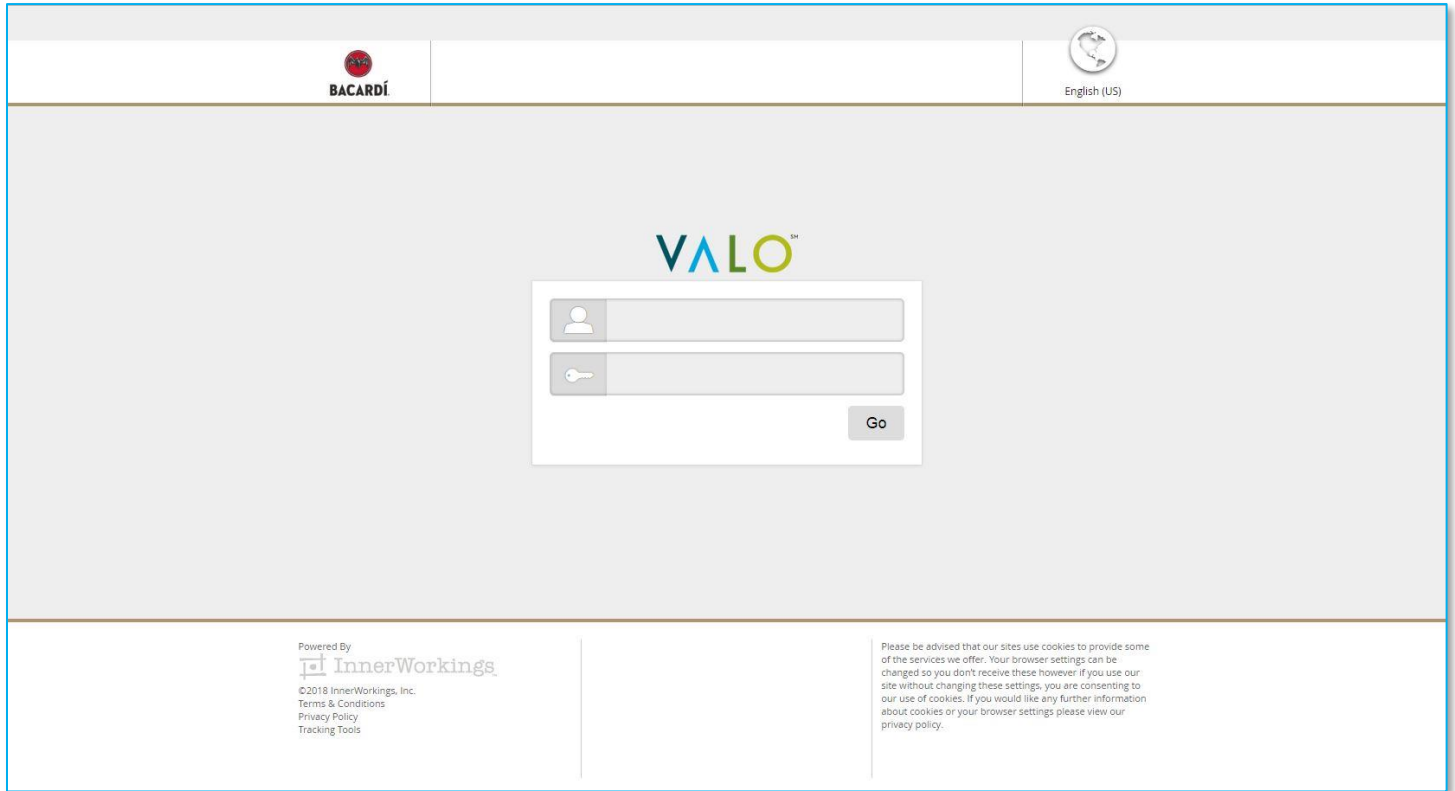
If this is your first time accessing VALO, please set your password by clicking the *Forgot your password?* link. You will be prompted to enter your username (your email address). Click *Go* to generate an email that will allow you to enter a custom password and access the site.

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The Buy Group List

When you first access the PurchasingManager module, if you are part of more than one buy group you will see a list of buy groups available for the regions you support. Each buy group consists of specific locations associated to that region where you will be able to allocate items. **If you belong to only 1 buy group, you will bypass the Buy Group List page.**

Buy Group List		
NAME	LAST CHANGE	USERS ONLINE
BUSA Q1FY20 BACARDI U.S.A., INC. (CORP)		0/1
BUSA Q1FY20 BACARDI U.S.A., INC. (MKTG)		0/8
BUSA Q1FY20 CANADA		0/2
BUSA Q1FY20 CONTROL CENTRAL - MICHIGAN		0/3

The Last Change column shows when a user last modified this buy group's information (for example, modified the amount of items they had expressed interest in ordering for a particular location). The Users Online column shows how many total users are currently accessing the site within a particular Buy group.

To View a buy group, click the link in the Buy Group Name column.

Navigating the Buy Group Screen

The buy group screen is arranged in a grid format. Each row represents one item in which a user can order (express interest) for any location. Each column represents an individual location the item can be ordered for.

To navigate left and right through the locations, use the arrow buttons.

Scroll up and down to view all the included items. The addresses will continue to display at the top of the screen as you scroll. After scrolling down, you can click the up arrow button in the lower left corner of the screen to return to the top of the list.

Filtering Items

You can narrow the list of items displayed using the checkbox filters on the left side of the screen. Note that when you select a particular filter option, other filter options that would not return any combined results are grayed out.

You can click the *Clear* link to clear selections for a particular filter (e.g., *Brand*) or click the *Clear All* link at the top of the list to clear all selections made and restore the full list of buy group items.

Click the pin icon to collapse the filter list so that you have more room on the screen for the item grid. This allows you to view more locations simultaneously.

You can then click the unpin icon to expand the filter list again.

You can also collapse a single filter by clicking the arrow to the left of the filter name. Click the arrow again to expand the list of filter selections.

Hiding Ship Point Locations

You can hide one or more locations on screen, making entering orders at a location level easier and allowing you to hide other distributors' locations during meetings if necessary.

If a location(s) is hidden, your totals & sub-totals will be updated to exclude the hidden location(s). One location must be visible at all times.

To hide a location, hover over the location and the hide icon will appear in the top-right corner. Clicking the icon will hide that specific location.

Once locations have been hidden, to show all locations again click the "Show All" button in the lower right corner of the screen. Clicking the Globe icon will display a list of all the locations.

To make only certain locations visible again, click the grayed out hide location icon next to the location you would like to display again.

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Full Screen Mode

Full screen mode expands to the width and height of your entire screen, utilizing all available space when allocating orders.

Clicking the ellipsis button next to the search bar will populate all filter options.
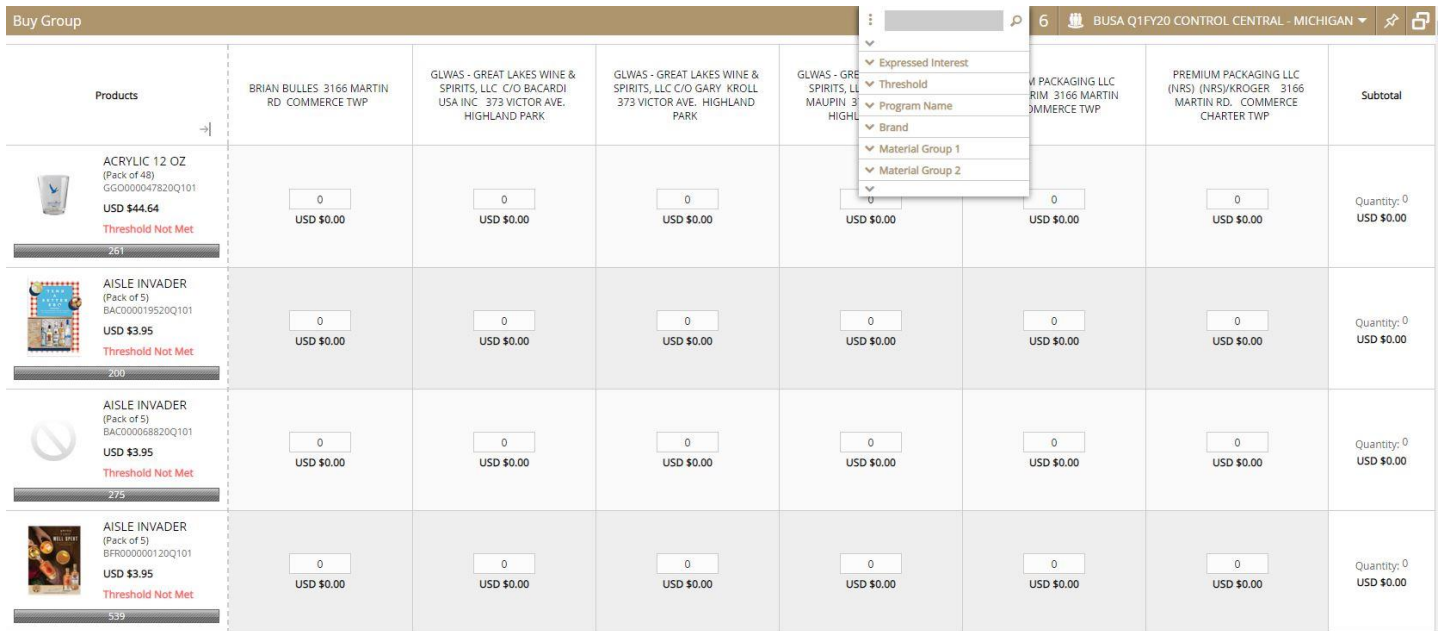
Viewing Buy Group Item Detail

Below each item displayed, you will see a list price as well as a tolerance gauge. The tolerance gauge is for internal use only and can be ignored. This will not affect your pricing.

You will see the gauge change color but as above this does not affect your pricing and is just for internal tracking only.

Click on the item image to view the item detail screen. This screen lists all the item's attributes and also includes a section that shows the estimated tolerance defined for this item as well as the interest expressed so far and the interest remaining. NOTE: the expressed interest is just for information and does not affect your pricing so please ignore.

Click the X in the upper right corner of the item detail screen to return to the list of items. Any filters you applied to the list will be retained.

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Express Interest for an Item

To express interest for a particular item for one of the listed locations during a buy cycle, enter the quantity you plan on ordering in the grid. The Subtotal column on the far right side of the screen will update, as will the

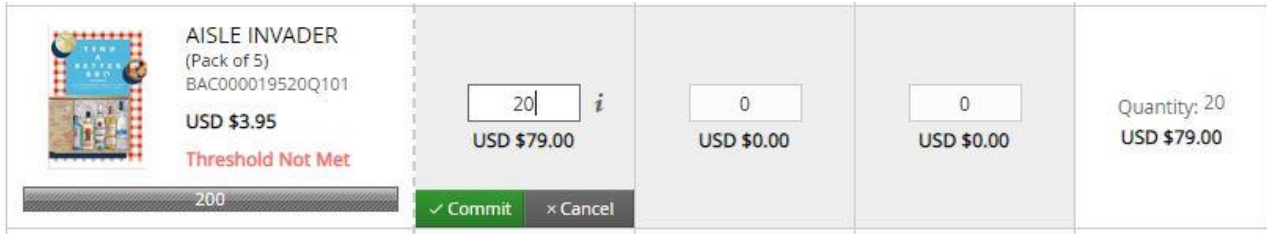tolerance gauge for the item. **Click the "Commit" button** ✓ Commit **or hit Enter to save your interest.**

If another user in your Buy Group is editing the quantity for the same item/location, the cell will be highlighted to show that it is currently being modified. When the other user is finished modifying, you will be able to update.

To view the list of users currently accessing the site, click the arrow next to the buy group name in the upper

right corner of the screen. Similar to the filters list, you can click the pin icon 📌 to pin the user list to the right

side of the screen and click the unpin icon ✖ to expand it.

At the bottom of the product list, you can view the subtotal amount for each location as well as the total of all items users have expressed interest in within this buy group. Note that these totals reflect only the items currently displayed, so any items that are hidden based on filter selections are not taken into consideration.

Viewing Past Buy Groups

Each buy group is active only for a specific Buy period. Once a buy group closes, you can view information, including the total interest expressed per item/location, by hovering over your user icon and selecting the *History* option.

You can search the list of previous buy groups by entering a date range or a portion of the buy group name and clicking *Search*.
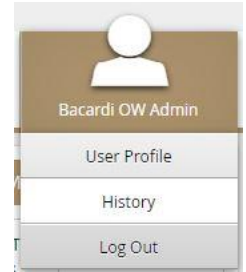
Click the *View Details* link to access the buy group grid in read-only mode. At the bottom of the screen, you will see an *Export* button that allows you to generate an Excel file with the buy group information.

Viewing Your User Profile

To access your profile, hover over your user icon and select the *User Profile* option.

If you wish you can upload a profile picture by clicking the *Edit* button.

You will then be able to click the *Choose File* button to upload a profile picture. This is the picture that other users will see next to your name when viewing the list of logged-in users.

Please do not change the Email listed in your User Profile as it will affect your access to the site and your buy groups.

Contact Support

For update or addition to your list of distributor locations, technical questions or issues, please reach out to Support.IWBacardi@inwk.com or 800-922-2389.