LBMX / Sphere 1 Guide for Invoice Retrieval

- ## Timeline

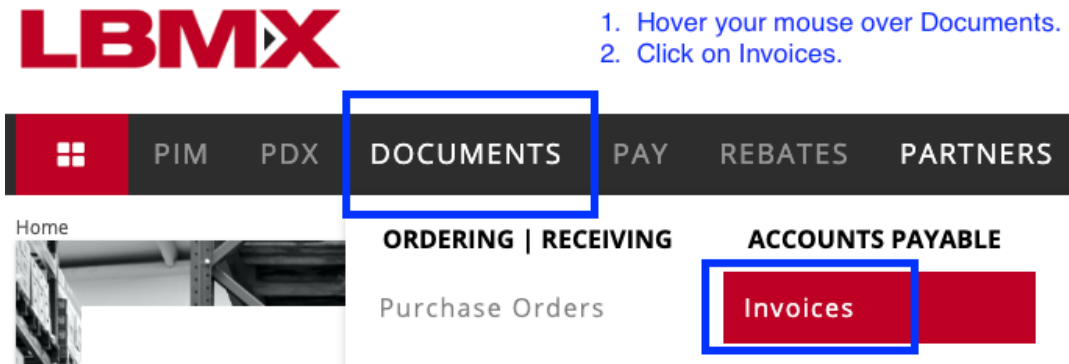| July 12 - 26	6 Webinars on How to Retrieve Invoices
Aug 5 - 6	Login credentials emailed out to Sphere 1 Primary Contacts
Aug 6 - Sept 4	Beta Testing with select group of Sphere 1 Suppliers
Sept 4	Go Live with all connected Sphere 1 Suppliers. The Go Live Date is subject to change.

- ## Login Credentials

  - Log in to LBMX's Sphere 1 Marketplace: https://lbmxmarketplace.com

  - All Sphere 1 Primary contacts will have access to LBMX and can add on additional users.

  - Do NOT share logins and passwords. Please create individual users. Multiple users can all be logged in at the same time.

  - Add User(s) - click on the Settings icon top right corner > click on User Administration > click on New on the left > complete User Information on the first tab > click on Permissions and choose what level of access you wish to allow:

    - To retrieve invoices only = Find Marketplace, click on right arrow to expand, Received invoice will pop up, then click on right arrow again to expand. Make sure to checkmark Marketplace and Received Invoice

    - To make as an Admin with all access = make sure to click on to right arrows for drop downs and checkmark all of them.

- ## KPI (Key Performance Indicator)

  - If you would like to set up some KPIs, like when your invoices are due, click on the 3 dots on the top right corner of the box, a pop-up box will appear:
    1. Select KPI Category = Accounts Payable
    2. Select KPI = Select applicable KPI
    3. Click Save

Should you have any questions, please email
support@lbmx.com with a CC' to LBMXHelp@sphere1net.com

- **Invoices**

  - Invoice Page - hover over the Documents header > Accounts Payables > Invoices

  1. Hover your mouse over Documents.
  2. Click on Invoices.

  - Open an invoice - find the column "Invoice Number," then click on an invoice # below.

  - Download or print invoice

    - Option 1 – Checkmark row > click Print.
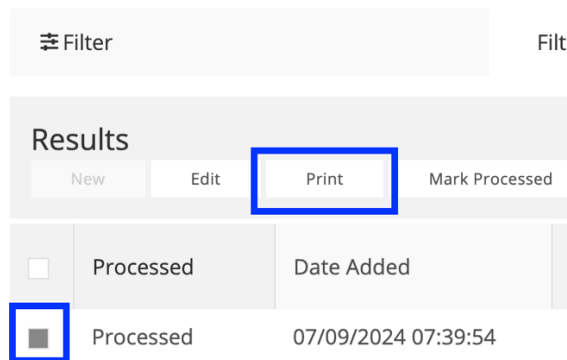
    - Option 2 – Click on Invoice # > click printer icon.
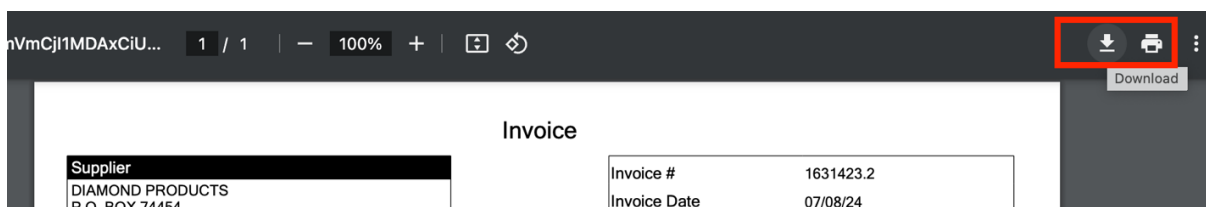
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- **Can't find an Invoice?**

  - Option 1 - Search Bar – Under the KPIs, type in the PO # or Invoice # in the Search Bar > click Search.

  - Option 2 – Use Filter – on the left side, click on Filter > click on Supplier Name > scroll and checkmark the Supplier you're looking for > scroll up back up to click on the Apply button.

  - Option 3 – Email Sphere 1 and LBMX - support@lbmx.com and CC' LBMXHelp@sphere1net.com

  We need your help by asking the vendor to send all invoices through LMBX's Sphere 1 Portal, as all your rebate dollars will be calculated through each invoice.

  If LBMX is missing invoices, your rebates will also be missed.

  o Here is a template to help track your invoices.

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- **Columns**

  - Processed / Unprocessed = Means read or unread.

  - Display Log = Shows all actions performed and by who (i.e. who viewed the invoice, who deleted the invoices, mark unprocessed, edit etc.)

  - More Columns Options = You can add or remove columns.

  - Adjust column width – Hover over the boundary on the right side of column header > click and move to the width that you want.

  - Print batches = You can print multiple invoices at once by check marking multiple rows, or you can click the very top left square, and that will check mark all of the invoices.

- ## Beta Testing

  - Testing Date - Aug 6 - Sept 4

  - You will only see invoices from these Sphere 1 Suppliers during our beta testing period.

  - If you receive an invoice directly but can't find the same invoice in LBMX, please track this and let us know by emailing Sphere 1 at support@lbmx.com, with a CC' to LBMXHelp@sphere1net.com.

  - We need your help by asking the vendor to send all invoices through LMBX's Sphere 1 Portal, as all your rebate dollars will be calculated through each invoice. If LBMX is missing invoices, your rebates will also be missed.

  - Here is a template to help track your invoices.

Beta Suppliers

Abbott Rubber Company Inc	Mi-T-M Corporation
ADA Solutions (SureWerx USA Inc.)	Neuvokas Corp - GatorBar (April Invoice)
Advantage Sales & Supply Company Inc (Ascent Lifting)	Norseman Drill & Tool
Aerosmith Fastening Systems	OCM Inc
Champion Cutting Tool	PIP - Protective Industrial Products
ClarkDietrich Building Systems	PrimeSource Building Products
Coilhose Pneumatics	Pro Line Products Inc
DAP Inc	Radians
Diamond Products	Reed Manufacturing
DRILTEC	ROLAIR Compressors
Durajoint Waterstop	Senco Industrial Tools
Enerco Group Inc	Shurtape Technologies LLC
Erin Rope Corporation	Soudal USA
FallTech	STI - Specified Technologies
ICP Building Solutions Group	Suncast Commercial Waste Management Solutions
Magnolia Brush	The Fountainhead Group
Majestic Glove	WinFab
MBW Inc	Wyco Tool
Metaltech-Omega Inc	

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FAQ

Order same way, pay the same way, and it does not affect your ERP system.

- Placing Orders - Please continue to order the same way you do now.

- Purchase orders, order confirmations, payment confirmations and statements will be sent directly from Supplier. Only invoices will now go through LBMX / Sphere 1.

- Payment – Please continue to pay the Suppliers directly, or the current way you do now.

- ERP – LBMX Invoice Retrieval does not affect or change your ERP system.

Will this affect our terms?

- No.

Will we receive invoices both from the vendor and through LBMX?

- For the beta testing period of August 6 – September 4, yes, you will receive invoices both ways to make sure that your invoices are received through LBMX.

- Please track and let us know if you are not receiving invoices from LBMX. You can email support@lbmx.com with a CC' to LBMXHelp@sphere1net.com.

- Once we do Go Live, Suppliers that are already connected with LBMX / Sphere 1 will only send invoices through the LBMX / Sphere 1 portal, and no longer the directly from the vendor.

I am only receiving invoices directly from the Supplier and NOT through LBMX.

- First, please make sure that specific Supplier is connected with LBMX. Please see above the beta Suppliers. Once we go live, we will provide you with a current list of connected Suppliers.

- If the Supplier is connected, please ask the vendor to send invoices through LMBX, as all your rebate dollars will be calculated through each invoice. If LBMX is missing invoices, your rebates will also be missed.

- Note: Suppliers who are not connected with LBMX will be sending you invoices the way they currently do now. Sphere 1 is working with those Suppliers to establish a connection and will notify Members once invoices are running through LBMX.

What happens when the quantity, pricing or info on the invoice is incorrect?

- Please email the Supplier directly to make that correction, with a CC' to Sphere 1 (LBMXHelp@sphere1net.com). Sphere 1 would like to track the correct invoice coming in, but the communication to make any corrections will be between the Member and Supplier.

Should you have any questions, please email
support@lbmx.com with a CC' to LBMXHelp@sphere1net.com

Do I need to download anything to use LBMX?

- No. LBMX is web-based. Please click on the link to login: https://lbmxmarketplace.com

Can I get an email to notify of new invoices?

- Click on Profile icon (top right) > Notifications > checkmark "Invoices Received Remind Me After"> type in # of Hours

Can I connect to my ERP system?

- Yes! Please email Matt Walsh at LBMX for more info: mwalsh@LBMX.com

Why can't I see my purchases and rebates?

- The analytics side of LBMX will be part of phase 2, which will be completed in the next 2-3 quarters. For now, we are in phase 1 of invoice retrieval where all your invoices are now housed in one place through the LBMX portal. If you would like your quarterly rebate report, please email AndreaO@sphere1net.com

Can I get non-Sphere 1 Suppliers on LBMX?

- No, this LBMX integration is for Sphere 1 Suppliers and Sphere 1 Members only.

What happens when a vendor leaves Sphere 1?

- There will be a notification from Sphere 1 so Members are aware. Please make sure you retrieve invoices directly from that Supplier moving forward.

What is LBMX?

- LBMX is an EDI provider for Sphere 1, where they will help transmit invoices from Sphere 1 Suppliers to the Members' LBMX portal. In 2025, they will help us take each invoice, calculate all the rebatable purchases and get you real-time information on how much rebate you are currently accruing with each Sphere 1 Supplier.

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