

Daily Amber Road procedure for clearing re-screen potential matches

Every day, Amber Road re-screens all partners, and there are “potential matches” generated from this re-screen. We need to have these reviewed and cleared (or escalated) ASAP.

Log into Amber Road (make sure Org is set to “University of Pittsburgh” first)

The screenshot shows the Amber Road web application interface. The top navigation bar includes 'EXPORT ON-DEMAND' and 'Partners Trade Content Admin Content Manager Engine Configurations'. The main content area is titled 'My Dashboard' and contains a 'Work Queue Status' section. This section displays a table with the following data:

Work Queue Name	Status	Work Queue	Summary Work Queue
RPS Work Queue			
Aging Queue	0 of 166		
Decision Pending Queue	0 of 0		
RPL Update Impact Queue	2 of 2		
Standard Queue	0 of 168		

A red arrow points to the 'RPL Update Impact Queue' row, which has a status of '2 of 2'. Another red arrow points to the top right corner of the dashboard area.

Review RPL Update query. If the number under the status column is anything other than 0 of 0, click on the report.

Review each match as you would any Amber Road match and clear it if you can (obvious things like different name). If you can't clear it, review the screening history to determine the email of the person who originally entered the partner.

The screenshot shows the Amber Road RPS Work Queue interface. The 'Screening History' button is circled in red. The interface displays partner information and a table of name match details.

Partner Decision

Buttons: Save & Next, Save Screening Decision, Set Skip New RPL, Generate Report, Generate Audit Report, Name Configuration, Go, **Screening History**

Status: Potential Match
Match Score: 100%
Export Embargo: No
Escalation: [Dropdown]
Import Embargo: No
Add Note: (0)
Gray List Embargo: No
Screened By: RPLUPDATE
Screened Date: 16-Aug-2017 18:21:42

Partner Information

RPS Partner ID	PTR_2150957283	Address 1
Name	KARL STORZ GmbH & Co. KG	Address 2
Contact Name		Address 3
Secondary Contact Name		City
Organization	PITT_RESEARCH	State / Province
		Country
		Zip / Postal

Name Match Details (2)

Buttons: Show Non Matches, Group By, No-Grouping, Go

Entity ID	RPL Type	Status Flag	Name	Match Score	Match
ENTITY207451694	IDB-SANCTIONS-LIST	[Flag]	Karl Storz GmbH & Co. KG	100%	Maybe
ENTITY201777596	WORLD-DEBR	[Flag]	KARL STORZ GMBH & CO. KG	100%	Maybe

Send that user an email asking them to review the match (include the PartnerID#) and clear it in the system). There is a step by step guide for clearing matches that you can send to them if they need it.

The screenshot shows the Amber Road Export On-Demand system interface. The main content area displays a table of search results for screening history. The table has the following columns: Partner ID, Partner Name, Screening ID, Screened Date, Screened By, Engine Decision, Notes, and Escalation. The data rows are as follows:

Partner ID	Partner Name	Screening ID	Screened Date	Screened By	Engine Decision	Notes	Escalation
PTR_2150957283	KARL STORZ GmbH & Co. KG	BPS2290540469	16-Aug-2017 18:21:42	RPLUPDATE	Potential Match	(0)	
PTR_2150957283	KARL STORZ GmbH & Co. KG	BPS2212452123	23-Jun-2017 07:05:57	RPLUPDATE	Potential Match	(0)	
PTR_2150957283	KARL STORZ GmbH & Co. KG	BPS2150957304	28-Apr-2017 19:21:34	srh75@pitt.edu	Approved	(0)	

The email address 'srh75@pitt.edu' in the 'Screened By' column of the third row is circled in red. The interface also includes a left-hand navigation menu with 'Quick Links' and 'Screening History' sections, and a top navigation bar with 'Partners', 'Trade Content', 'Admin', 'Content Manager', and 'Engine Configurations' tabs.

Continue this process until the report reads 0 of 0 in the status column.

TIPS

Consult the AR replacement spreadsheet (prior to sending the emails to users, as some personnel changes may have occurred).

Send the email from the TradeCompliance box, making sure to change the "From" line and removing your signature from the body of the email.

Suggested Subject line: **Amber Road E2Open Potential Matches**

Suggested wording of email body:

A partner entered by you has hit as a potential match upon re-screen. Would you kindly review and mark it in the system?

[Partner IDs here]

Thank you