



## SRM Profile Creation

### Introduction

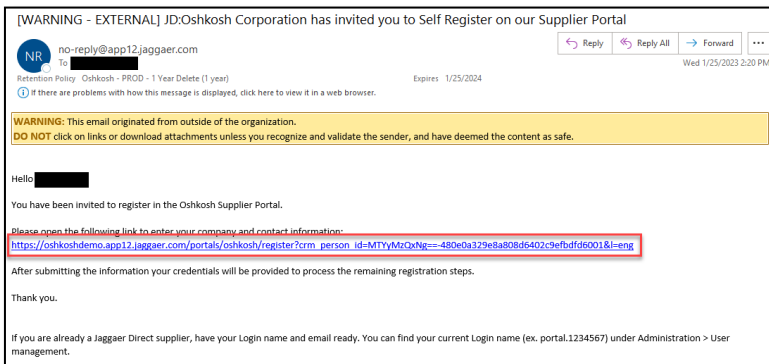
In 2022 Oshkosh Corporation went live with a new Supplier Portal, Jaggaer. All purchase orders are being sent through this portal so it is a requirement that every Oshkosh Corporation supplier onboard on to Jaggaer. Non-compliance will prevent Oshkosh from being able to conduct business with the supplier.

|                                      |             |
|--------------------------------------|-------------|
| Initial Supplier Setup               | Pages 1-11  |
| Adding, Editing, & Removing Contacts | Pages 11-12 |
| Roles & Responsibilities             | Page 13     |

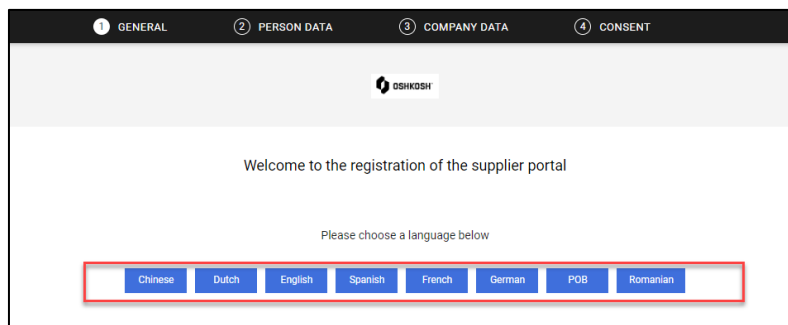
### On-boarding Process

This section will walk through the step-by-step process to getting the profile created within the JAGGAER Direct Supplier Portal.

1. You will be em an email link for registration, follow this link to do the initial profile set up



2. Select the Language you would prefer to use for the supplier portal.





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3. Complete and verify your **Contact Information**. Fields marked with an astericks (\*) are mandatory.
4. Click **Continue**.

CONTACT PERSON

Salutation

Mx.

First name\*

Last name\*

Department

...

Telephone\*

+ -- Area Number

Mobile

+ -- Area Number

E-Mail\*

kgrace@oshkoshcorp.com

Back Continue



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5. Complete the required company data indicated by astericks (\*) and then proceed by selecting continue

### COMPANY DATA

Company name\*

Company name 2

Street\* 

Street 2

City\*

Country\*

State / Province

Zip code\*

Telephone

|   |     |      |        |
|---|-----|------|--------|
| + | --- | Area | Number |
|---|-----|------|--------|

Homepage

Currency

D-U-N-S 

Back

Continue

6. Next window is a disclaimer noting Jaggaer's supplier access terms. Only the first box is required to move on.
- Note** – These terms state it is your responsibility to handle and manage the data as accurately as possible

To access and use JAGGAER as a supplier, you are required to accept the Supplier Access Terms.

☐ I agree and accept [Supplier Access Terms](#).

To make your profile visible in the JAGGAER Supplier Network for purposes of pursuing business transactions, please indicate your agreement below.

☐ I agree that JAGGAER will use the company and personal data entered in the course of the registration on the supplier portal of Oshkosh in order to allow all customers of JAGGAER to find your organization via the JAGGAER Supplier Network. You may revoke your agreement and discontinue visibility in the JAGGAER Supplier Network at any time by updating the visibility setting in your company profile.

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Accept and Submit



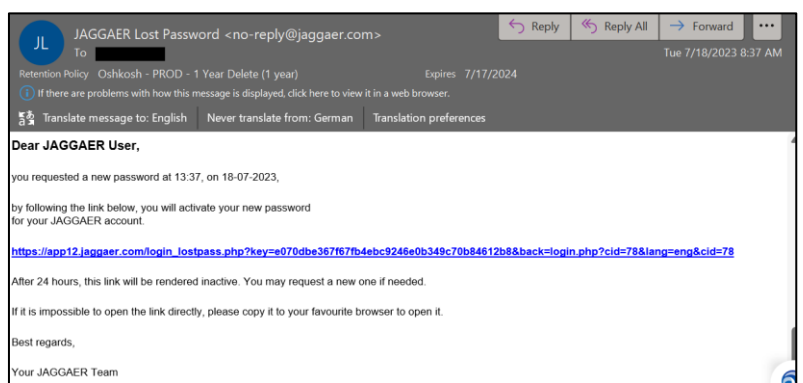
## SRM Profile Creation

|                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>7. Once you have accepted and submitted you will be greeted with this message.</p> <ul style="list-style-type: none"> <li>An email will also be sent with a link to the set password</li> <li>Note – Passwords are not sent via email and are managed by the supplier. In the event you forget the password you will need to work with Jaggaer directly.</li> </ul> | <div> <p><b>Congratulations!</b></p> <p>Thank you for registering your company. You will shortly receive two emails:</p> <ol style="list-style-type: none"> <li>1. An email from JAGGAER containing a link to define a new password. This more secure password is needed for your new JAGGAER Global Identity, which you can use to authenticate to this customer portal going forward. The link in this email expires in 24 hours.</li> <li>2. An email from your customer confirming your company registration and providing more information about your account.</li> </ol> <p>You may now close this window.</p> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <p>8. Check your inbox for an email providing you with your login name (email address) and follow the link</p> <ul style="list-style-type: none"> <li>You will receive two emails, either one will work</li> </ul>                                                                                                                                                     | <div> <p>From: <a href="mailto:no-reply@app12.jaggaer.com">no-reply@app12.jaggaer.com</a> &lt;<a href="mailto:no-reply@app12.jaggaer.com">no-reply@app12.jaggaer.com</a>&gt;<br/> Date: Wed, May 1, 2024 at 1:27 PM<br/> Subject: JD:DEMO: Oshkosh Corporation thanks you for registering on our Supplier Portal<br/> To: [REDACTED]</p> <p>Dear [REDACTED],</p> <p>Thank you for successfully registering with the Oshkosh Supplier Portal.<br/> We have no record of you registering another Jaggaer account with this email address and so you will need to set a password using the following link:<br/> <a href="https://demo.app12.jaggaer.com/modules/portal/jintlogin/createintSetPassword?reg_hash=69175d141e36d839e4d43aa30f5b9801f28c317e53ade06520c49657f47a095f1demo.app12.jaggaer.com">https://demo.app12.jaggaer.com/modules/portal/jintlogin/createintSetPassword?reg_hash=69175d141e36d839e4d43aa30f5b9801f28c317e53ade06520c49657f47a095f1demo.app12.jaggaer.com</a></p> <p>Please note, your email address is your user name.</p> <p>NOTE: If you did NOT request this email, please contact <a href="mailto:jdsupport@jaggaer.com">jdsupport@jaggaer.com</a></p> </div> |
| <p>9. You will be brought to a page to request a password. Select Continue.</p>                                                                                                                                                                                                                                                                                        | <div> <p><b>Your Account Has Been Upgraded To JAGGAER Global Identity</b></p> <p>English ▼</p> <p>Your account has been upgraded to JAGGAER Global Identity.</p> <p>You will receive an email containing a link to define a new password. This link will be valid for 24 hours.</p> <p>Going forward, you will be able to securely authenticate using your email address as the username and your newly defined password.</p> <p><a href="#">Continue</a></p> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |



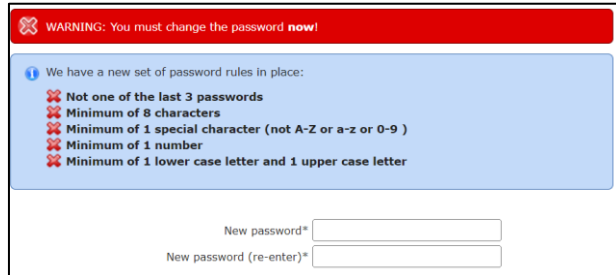
## SRM Profile Creation

10. Check your inbox for another email that will provide you with a link to set a password



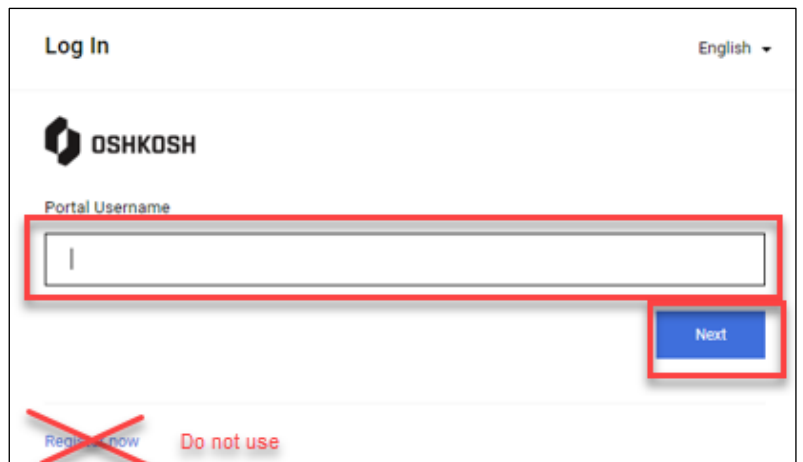
11. Password should meet the following criteria:

- Minimum of 8 characters
- Minimum of 1 of the following character: !@#\$\$%^&\*()?
- Minimum of one number
- Minimum of one alphabetic character



12. Login with your credentials (email address).

- Note – DO NOT USE “**REGISTER NOW**”





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13. If you have multiple accounts please select which one you are trying to log into.

**Select User** English ▾

Multiple JAGGAER Direct users were found to be associated with your Jaggaer Supplier Account. Please choose the user you would like to proceed with.

- Green Tree (footloose, United States of America)
- Green Tree (bellair, United States of America)
- Green Tree (Blair Waldorf Designs, United States of America)
- Green Tree (serenavdesigns, United States of America)
- Green Tree (Irving company, United States of America)
- Green Tree (OSHTEST, United States of America)
- Green Tree (Message test, United States of America)
- Green Tree (Test supplier 1, United States of America)
- Green Tree (JonesGJI, United States of America)
- Green Tree (Cert test, United States of America)
- Green Tree (Greentree, United States of America)

14. Click the  to the right of "Your registration has not been finished yet. Continue with the registration."

**OSHKOSH**

Supplier Portal Dashboard - Welcome, [redacted] from [redacted] | Partner no. [redacted]

 Your registration has not been finished yet. Continue with the registration.

Home

BLACKBOARD

| Title                    | Comment                                                                                             |
|--------------------------|-----------------------------------------------------------------------------------------------------|
| JLG Holiday Announcement | JLG Holiday Announcement<br><a href="https://osn.oshkoshcorp.com/">https://osn.oshkoshcorp.com/</a> |
| JLG Holiday Announcement | Valued JLG supplier,                                                                                |

As a result of strong demand and previous intermittent supply chain disruptions, JLG will be operating...

15. There will four sections, DATA, CONTACTS, CATEGORIES, and PROFILE
- DATA should be complete from initial registration but here you can verify it's accuracy
  - CONTACTS – See page 11, you can add and edit additional contacts, otherwise all roles default to user setting up account
  - CATEGORIES – Primary Category is mandatory, select best fitting options
  - PROFILE – See next step

Registration - Contacts

Assigned Roles: DATA CONTACTS CATEGORIES PROFILE

| Assigned Roles | Contacts                 |
|----------------|--------------------------|
| Sourcing       | Profile                  |
| Payment        | Defense Sourcing Contact |

Order Confirmation

Company President

Registration - Categories

Search for categories

Categories Overview

- Fabrications
- Castings
- Machining
- Composites/Plastics
- Wheels and Tires
- Electrical
- Hydraulics
- Climate
- Powertrain

Selected Categories

Choose Primary Category\*

Top level is mandatory

Facilities/Office and Operations Support

- Industrial Supplies
- MRO Supplies
- Tool and Power Tools
- Safety Supplies
- Office Supplies



## SRM Profile Creation

16. First Section is "General." Each section indicated with an astericks is mandatory to answer Yes or No.

- Oshkosh Supplier Expectations
  - i. Supplier Code of Conduct – **Mandatory**
  - ii. Supplier Standards Guide – **Mandatory**
  - iii. FRDM – **Preferred**, not mandatory

### Oshkosh Supplier Expectations

I have read, understand and agree to follow the Oshkosh Corporation Supplier Code of Conduct?\*

[Supplier Code of Conduct](#)

[Código de Conducta del proveedor](#)

??????

☒ Yes

I have read and understand the Oshkosh Corporation Supplier Standards Guide \*

<https://osn.oshkoshcorp.com/en/supplier-resources/standards-guide>

☒ Yes

To join forces with Oshkosh Corporation to help combat the reality of modern-day slavery, I have created a profile and completed the supplier questionnaire within FRDM.\*

<https://app.frdm.co/assessments/49>

☒ Yes

- General Profile Questions
  - i. All sections are mandatory except the comments section and the "Remit To" address question

### General Profile Questions

Supplier Type\*

☒ Manufacturing

Is your company public or privately owned?\*

☒ Private

Total Annual Sales\*

☒ 1) \$0-\$10 million

How many total employees do you have?\*

☒ 2) 100-999

Do you have a Parent Company?\*

☒ No

Are you a U.S. based company?\*

☒ Yes

Do you have the ability to perform business to business (b2b) or EDI integrations to support order management processes with your customers?\*

☒ Yes

Does your company provide cost breakdowns if requested (i.e. labor and material)?\*

☒ Yes

Comments

Do you have a Cage Code Number?\*

☒ No

<https://cage.dla.mil/>

Is the Remit To address different than base address provided?

☒ No

- Production Calendar
  - i. Preferred but not required

### Production Calendar

Please upload completed production calendar

[Production Calendar](#)

No file chosen



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- Quality
  - i. Selecting “I have read the Supplier Quality Manual” is required
  - ii. Supplier Quality Audit is required for suppliers of direct manufactured products; it is not required for indirect products and services
  - iii. CDAAS is only required if you are providing Electronic Components

**Quality**

Please read the Supplier Quality Manual [here](#)

☒ I have read the Supplier Quality Manual

Please complete the quality self-audit and attach below a copy of the completed form.

[Global Supplier Quality Manual \(For Reference\)](#)  
[Supplier Quality Audit Form \(Download and Complete\)](#)

Choose File | No file chosen

Please select  
 Not applicable (I am a provider of indirect services to Oshkosh Corporation) ▼

Does your organization provide electronic parts (i.e. internal components) as defined in DFARS 252.246-7007. Also Referenced in Section F, Attachment 2 in the [Supplier Standards Guide](#)\*

[Attach CDAAS / Counterfeit Detection Audit Template](#)

Please select\* Not applicable (I am not a provider of electronic parts) ▼

- Tax Information
  - i. All fields mandatory, you will need to attach a copy of your W9 for the last section

**Tax Information**

Sales Tax Exemption Status\*  
 Yes ▼

Tax organization Type\*  
 Individual ▼

Please select your Tax Country/Region\*  
 US ▼

Taxpayer ID\*

1099 Reportable?\*  
 Yes ▼

W9 attachment\*

- Accounts Payable Information
  - i. Mandatory – you will set up contacts in a later step, if there will only be one contact you are the default payment contact

**Accounts Payable Information**

Did you confirm that your Payment contact information is correct? \*

[Link to update payment contact](#)

Yes ▼



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- Once complete select "Save" from the top-right corner
  - If you missed any fields you will be notified via a warning message. If you completed the section incorrectly it will show up in the list.

17. Second section is "Products;" this section is geared specifically to direct suppliers, please complete as much of this section as you can. This section goes into further analysis of quality specifications and engineering capabilities.

- If you are not supplying components/assemblies for our final products you can move on to the next step

18. Third section is "Certifications;" this section is also geared specifically to direct suppliers but require answers for each question

- If indirect or a question is not applicable to your company select "No" or "Not Applicable" from the drop-down option



## SRM Profile Creation

19. Fourth section is only informational, it provides our location codes; these are referenced on Purchase Orders and Forecasts.

- Select the next section (BSC) to continue on

| Location Code | Description                        | Address Line 1              | Address Line 2     | Address Line 3 | City     |
|---------------|------------------------------------|-----------------------------|--------------------|----------------|----------|
| CAL599989     | OSHKOSH CORPORATION CALIFORNIA RLC | 27731 DIAZ ROAD             |                    |                | TEMECULA |
| CB8603654     | DFAS - COLUMBUS CENTER             | DFAS - Columbus Center      | West Entitlement   | PO Box 182381  | Columbus |
| DCMA1010950   | OSHKOSH DEFENSE AFTERMARKET-DCMA   | South Plant DCMA            | 2815 Oregon Street |                | Oshkosh  |
| DEF599877     | OSHKOSH DEFENSE KSA WAREHOUSE      | 3rd Industrial Area Exit 12 |                    |                | Riyadh   |

20. Fifth section is the Business Status Certification portion and the following fields are required:

- Address
- City
- State
- Zip Code (9-digit format, no dash)
- Country
- Principal Products/Service
- NAICS Code (North American Classification System, six-digit code describing principal products/service provided, multiple codes can be provided)

- The second portion on this section is declaration of business size, foreign-owned status, as well as other various concern options that may apply
  - Only the sections with asterisks (\*) are required
  - Foreign-owned suppliers will need to further indicate if any subcontract performance occurs within the United States
  - For the most part, size standards are based on the average annual receipts or the average employment of a supplier
  - For more information on these size standards, please visit <https://www.sba.gov/federal-contracting/contracting-guide/size-standards>

Please indicate below if business concern is a Small Disadvantaged Business Concern, Women-Owned Business Concern, Minority-Owned Business Concern, HUBZone Small Business Concern, Veteran-Owned or Service-Disabled Veteran-Owned Business Concern (Check all that apply).

You may wish to review the definitions for the categories listed below in the FAR 19.7 or 52.219-8 at: <https://www.acquisition.gov/q-q-browsefar>

Of the following, check all that apply:

- ☐ Small Disadvantaged Business Concern
- ☐ Native American/Alaskan/Hawaiian Owned
- ☐ Women-Owned Business Concern
- ☐ HUBZone Small Business Concern-(must be certified with the SBA)
- ☐ Service-Disabled Veteran-Owned Small Business Concern
- ☐ Veteran-Owned Small Business Concern
- ☐ Minority-Owned Business Concern



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- Final requirement of this section is at the bottom which is to sign and certify accuracy

The offeror represents and certifies that the information provided is true and understands that Under 15 U.S.C., any person who misrepresents a firm's status as a business concern that is small, HUBZone small, small disadvantaged, service-disabled veteran-owned small, economically disadvantaged woman-owned small, or women-owned small eligible under the WOSB Program in order to obtain a contract to be awarded under the preference programs established pursuant to section 8, 9, or 15, 31, and 36 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall:

(i) Be punished by imposition of fine, imprisonment, or both;

(ii) Be subject to administrative remedies, including suspension and debarment; and

(iii) Be ineligible for participation in programs conducted under the authority of the Small Business Act.

Authorized Signature of Contact Certifying the Above Information\*  Title\*

Phone\*  Date\* m/d/y

I certify that the above information is accurate.\*

### 21. The Sixth and final section is the FFATA (Federal Funding Accountability and Transparency Act) tab.

- The first question is required for everyone:
  - If **Yes**; you will need to complete the rest of this section
  - If **No**; you are complete and select save from the top-right corner. If all mandatory fields are complete you can also select Publish from the top-right corner.

DATA CONTACTS CATEGORIES PROFILE

General Products Certifications Informational - OSK Location Codes BSC **FFATA**

✓ Please fill ALL mandatory fields in ALL categories before clicking 'Publish'  
Mandatory fields filling progress: 100%

**FAR 52.204-10 Requirement**

Are you or will you be a supplier to Oshkosh Defense?

In accordance with Federal Acquisition Regulation clause 52.204-10 (Reporting Executive Compensation and First-Tier Sub-Contract Awards), Prime Contractors awarded a federal contract or order are required to file a FFATA sub-award report. To be compliant with this FAR clause you will be required to complete information fields and answer questions below. The following information may be made public regarding Oshkosh Corporations first tier subcontracts/purchase orders, in accordance with FAR 52.204-10.

Back Save Publish

- If you are supplying Oshkosh Defense; Section one will be to meet the FAR 52.204-10 requirement
  - All sections (excluding Parent Vendor Name & Parent Unique Entity ID) are required
    - Note: Zip code is 9-digit, no dash, space, or special characters
  - There is a link to instructions on obtaining a Unique Entity ID from SAM.gov below that field
    - Note: UEI is 12 alphanumeric characters

**FAR 52.204-10 Requirement**

Are you or will you be a supplier to Oshkosh Defense?

In accordance with Federal Acquisition Regulation clause 52.204-10 (Reporting Executive Compensation and First-Tier Sub-Contract Awards), Prime Contractors awarded a federal contract or order are required to file a FFATA sub-award report. To be compliant with this FAR clause you will be required to complete information fields and answer questions below. The following information may be made public regarding Oshkosh Corporations first tier subcontracts/purchase orders, in accordance with FAR 52.204-10.

Unique Entity ID (SAM)

Instructions: Sam.gov - <https://sam.gov/content/duns-uei>

Supplier Name

Parent Vendor Name

Parent Unique Entity ID (SAM) (if applicable enter number if not N/A)

**Place of Performance**

Street Address

City

State

Zip Code + 4

Country



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- Second section will be to satisfy the FFATA Information; use the drop down option next to each applicable option to select yes or no.
  - The final question will require the names, titles, and compensation of the highest compensated executives if not reported through SEC

### FFATA Information

In your organization's preceding completed fiscal year, did the organization (the legal entity to which the DUNS number belongs) have gross income, from all sources, under \$300,000? No

In your organization's preceding completed fiscal year, did your company receive 80% or more of your annual gross revenues from U.S. Federal contracts (and subcontracts), loans, grants (subgrants), cooperative agreements, and other forms of U.S. Federal financial assistance, with those annual gross revenues being \$25M or greater? Yes

Total Compensation and names of top five executives is available through reporting to the SEC Yes

Provide the following information for the five (5) most highly compensated executives in your business or organization for the previously completed fiscal year

|   | Name                 | Position Title       | Total Compensation Amount for the Entity's last completed fiscal year |
|---|----------------------|----------------------|-----------------------------------------------------------------------|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/>                                                  |
| 2 | <input type="text"/> | <input type="text"/> | <input type="text"/>                                                  |
| 3 | <input type="text"/> | <input type="text"/> | <input type="text"/>                                                  |
| 4 | <input type="text"/> | <input type="text"/> | <input type="text"/>                                                  |
| 5 | <input type="text"/> | <input type="text"/> | <input type="text"/>                                                  |

- Final step will be to Sign, Certify, Save, and Publish
  - All Fields are required
  - Save & Publish are at the top of the screen

The supplier certifies that the above information provided in this request is accurate and complete:

Authorized Signature of Contact Certifying the Above Information  Title

Email   Date

I certify that the above information is accurate. ...

Back

Save

Publish

This section is complete; after hitting publish the profile submission will go to an internal gate keeper for review. You will get a notification email once completed and approved.



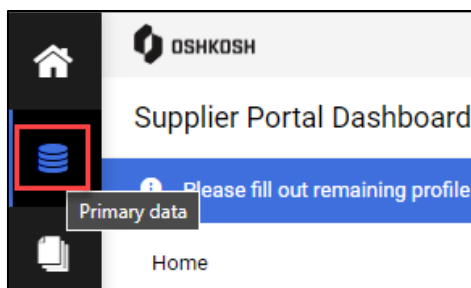
## SRM Profile Creation

### Adding, Editing, and Removing

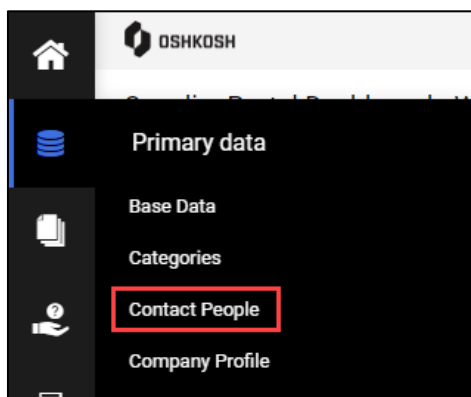
The purpose of this job aid is to walk through the steps of adding additional contacts, removing no-longer valid contacts, as well as a description of the different roles and responsibilities within the Jaggaer portal.

|             |                                               |
|-------------|-----------------------------------------------|
| Pages 11-12 | Adding, editing, and deleting contacts        |
| Page 13     | Assigning/Changing Roles and Responsibilities |

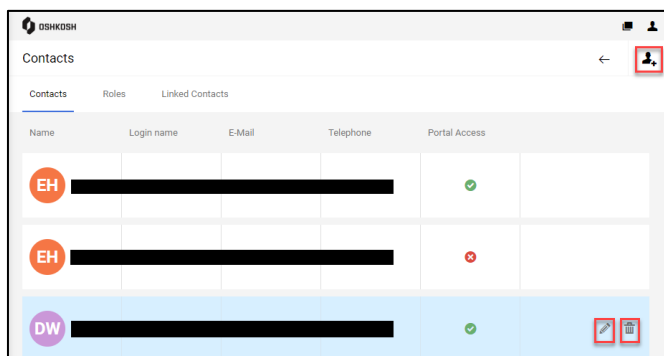
1. Once logged into Jaggaer; select the  icon from the left menu to access Primary data



2. When you click on "Primary Data" four options will appear. Select the third option "Contact People"



3. You will be brought to the contacts home where you can view, edit, and delete contacts.
  - a. If you want to add a contact, select the  icon in the top right
  - b. If you want to edit a contact (update name, phone, or email) select the  icon on the far right side when hovering over a specific contact
  - c. If you would like to delete a contact, select the  icon on the far right side when hovering over a specific contact





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4. If Adding contacts; after selecting “add” with the  icon, fill in all of the required fields (marked with \*) and click “save”
  - a. If you intend for the contact to be able to access Jaggaer for any reason you must toggle the **Portal Access** button, it will appear blue and below a loginname field will appear
    - i. Usernames are unique and as general rule of thumb we recommend using the first part of your email  
(joe.smith@example.com = joe.smith)

Cancel Save

CONTACT PERSON

Salutation  
Mr. ▼

First name\*

Last name\*

Department  
... ▼

Telephone\*  
- - - Area Number

Mobile  
+ - - Area Number

E-Mail\*

☐ Portal Access ⓘ

Main Site  
Jaggaer Test Company

Additional Sites  
... ▼

☒ Portal Access ⓘ

Loginname\*

5. If deleting a contact, after selecting “delete” with the  icon, you will be prompted with a warning message

Information ⓘ

Are you sure to delete this account?

Close Yes

**Note:** Editing a contact in this section is limited to name, email, and phone numbers. Roles is covered in next section.



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### Roles and Responsibilities

- After you have all of your contacts added, you can assign roles by selecting the second tab from the top menu, below are description of each option
  - **Sourcing** – Answer and respond to any electronic RFQs regardless of segment (*multiple contacts*)
  - **Profile** – Maintain and adjust supplier profile for your company (*one contact*)
  - **Order Confirmation** – Contact will confirm and change PO's (*multiple contacts*)
  - **Company President** – Name of company president (*one contact*)
  - **Payment** – View payments, receipts, & invoices (*multiple contacts*)
  - **Defense Sourcing Contact** – Answer and respond to any electronic RFQs for Defense only. Can only be one person but if they are not available will move to main sourcing list of names (*one contact*)
  - **Cyber Security Contact** (*multiple contacts*)
  - **Access SIOP** - Attend quarterly Access Segment leadership meetings to review SIOP outlook and participate in discussions that help shape expectations of performance and ongoing initiatives. (*two contacts preferred*)
  - **Compliance Manager** (*one contact*)

- To edit the roles, select the edit icon next to anyone of the roles

- After selecting the icon, an “assign company roles” window will pop up
  - You are able to pick any role and assign from this window
  - Some roles you can assign to multiple while some are restricted to a single user as noted above in *blue*

- To assign a person, select the icon

- If its a role that can be multiple, select add another responsibility to add additional contact

- End Job Aid