Delegation Rule Management

The SAQ has reviewed, simplified and improved the delegation rule.

The advantages of the new procedures are:

- You can now have more than one delegation rule
  - There's no limit on the number of agents that can represent you.
- Each agent has access only to the products it represents.
- Each agent has access only to the offers for which it is registered.

This allows the agent delegated by the supplier to act as the supplier's representative on SAQ-B2B for the products the agent represents. Note that the agent has to have an active SAQ-B2B account under its name.

In designating an agent, the supplier agrees that the information about its business on SAQ-B2B can be securely and confidentially shared with the agent for the agent's benefit. A supplier can revoke the rights of any agent it has designated.

Designated agents are authorized to take the following actions on behalf of the supplier:

- submit a new product offer (AO/OS) as part of a product selection process or a renewal offer (RC);
- submit a private import request (DI) or renewal request (RP);
- submit a price change request;
- confirm, modify and/or refuse an order for products to be sold in the SAQ network
  - For private import orders, only the supplier is authorized to accept orders.

The agent will also be able to submit private import requests and renewals provided it has been authorized by the SAQ.

The rule does not authorize, at any time, an agent to submit products for a promotion.

A supplier that wants to authorize an agent to sign up products for a promotional program and make the related financial commitments has to complete the Power of Attorney for the Purchase of Promotions by an Agent form and submit it via the Contact Us module with the following category and subject:
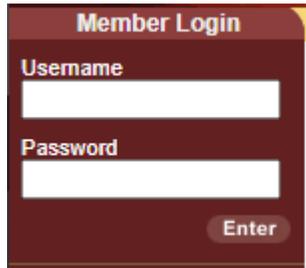
*Required Information

Category *	Form
Subject *	Power of Attorney

Any promotion submitted by an agent lacking such authorization may be refused and cancelled.

Create a delegation rule

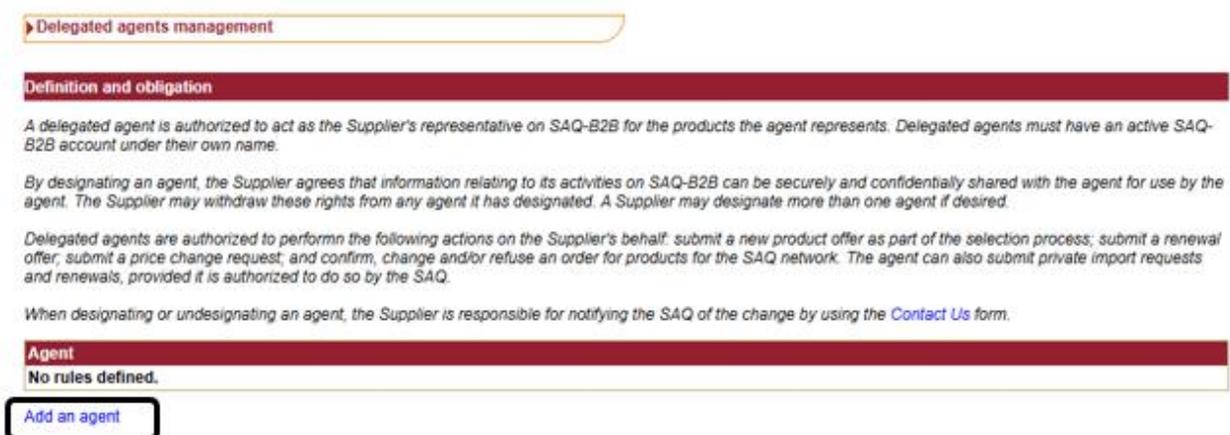Log into your SAQ-B2B.COM account by typing your username and password and clicking the Enter button.

Click the **Delegated Agent** tab.

On the **Delegated Agents Management** screen:

Select the Add an Agent link in order to define your delegation rule(s).

Define the delegation rule

▶ Delegated agent - add

Please define your delegation rule.

Delegate

Agent : [   ]   Select Agent

☐ I confirm that the selected agent is authorized to act as the supplier's representative on SAQ-B2B for the products it represents (hereinafter "the Products").

Further, I acknowledge that the agent is authorized to take, on the supplier's behalf, the following actions regarding the Products: submit a new product offer as part of a selection process or renewal offer; submit private import requests; submit price change requests; and/or refuse an order for any of the Products intended for the SAQ network.

[Save] [Reset]

- Click the Select Agent link.

- In the Delegated Agent – Agent Search section, search for the account of the agent you want to create a delegation rule for.

You have two options:

1. Type all or part of the agent's name, then click Search.

▶ Delegated agent - agent search

Agent Name [Agent name]   Member Since [   ] / [   ] / [   ] (YYYY/MM/DD)

[Search] [Clear]

- The agent's name is displayed.

▶ Delegated agent - agent search

Agent Name [/Agent name]   Member Since [   ] / [   ] / [   ] (YYYY/MM/DD)

[Search] [Clear]

1 result(s) found
Page: 1 of 1

Company Name ▲	Member Since
🔘 Agent name	AAAA/MM/JJ

[Select] [Cancel]

1 result(s) found
Page: 1 of 1

- Click the Select button.

2. From the complete list of agents with SAQ-B2B accounts:

- Leave the Agent Name field blank and click the Search button.

▶Delegated agent - agent search

Agent Name [   ]   Member Since [   ] / [   ] / [   ] (YYYY/MM/DD)

[Search] [Clear]

- The list of all agents is displayed.

▶Delegated agent - agent search

Agent Name [   ]   Member Since [   ] / [   ] / [   ] (YYYY/MM/DD)

[Search] [Clear]

1 2 3 4 5 6 7 8 9 10 **Next Page** >>   818 result(s) found
                                                    Page: 1 of 33

Company Name ▲	Member Since

- Search for the name manually.

▶Delegated agent - agent search

Agent Name [   ]   Member Since [   ] / [   ] / [   ] (YYYY/MM/DD)

[Search] [Clear]

1 2 3 4 5 6 7 8 9 10 **Next Page** >>   818 result(s) found
                                                    Page: 1 of 33

Company Name ▲	Member Since
◉ Agent name	AAAA/MM/JJ

- When you find the agent, tick it and click the Select button at the bottom of the screen.
- Confirm your agent selection.

When the Delegated Agent – Add screen is displayed, the name of the selected agent is entered in the Agent box.

Delegated agent - add

Please define your delegation rule.

Delegate

Agent :   [Agent name]   Select Agent

☐ I confirm that the selected agent is authorized to act as the supplier's representative on SAQ-B2B for the products it represents (hereinafter "the Products").

Further, I acknowledge that the agent is authorized to take, on the supplier's behalf, the following actions regarding the Products: submit a new product offer as part of a selection process or renewal offer; submit private import requests; submit price change requests; and/or refuse an order for any of the Products intended for the SAQ network.

[Save] [Reset]

- Tick the box to the left of the confirmation statement.

☑ I confirm that the selected agent is authorized to act as the supplier's representative on SAQ-B2B for the products it represents (hereinafter "the Products").

Further, I acknowledge that the agent is authorized to take, on the supplier's behalf, the following actions regarding the Products: submit a new product offer as part of a selection process or renewal offer; submit private import requests; submit price change requests; and/or refuse an order for any of the Products intended for the SAQ network.

[Save] [Reset]

The Save button changes colour. Click it to confirm.

The agent is added to your delegated agent list.

Agent

Agent name   Delete

Add an agent

Assigning an agent

When you decide to assign an agent to one or more of your products, you have to add a delegation rule for the agent using the procedure provided above.

To assign the right products to the right agents, you have to fill out the Excel list made available to you.

To avoid your having to copy all the information, there is an easy way for you to obtain the list of all your products.

Obtain your product list

The list of all your products can be found in your SAQ-B2B.COM account under the My Products tab, in the Product Sheets section. After going there, click the View My Product Sheets button.

The following screen appears.

From the Nature of Product drop-down list, choose:

- Wine
- Spirits
- Beer

OR

- Other

To obtain **list of your products** of the selected nature, whatever their status, leave the Status field blank.

Copy the displayed product lines and paste them into the Excel worksheet in columns B to J. If your product list has more than one page, repeat the operation.

In the Information to Provide section (columns L to P), enter the requested information for each line.

Information à compléter *Information to provide*				
Numéro SAQ du fournisseur SAQ supplier number	Numéro d'offre (AO/OS/DI) s'il s'agit d'un produit sans code Offer number (AO/OS/DI) if no code	Réseau de distribution (SAQ / Importations privées) Distribution network (SAQ / Private Imports)	Numéro SAQ de l'agent SAQ agent number	Nom de l'agent Agent name

- You can find your SAQ supplier number on a product offer.*
- If it is for an offer, enter the offer number, which will be found in the SAQ Catalog of Offers and Private Import Requests module.
- Choose the distribution network.
- The agent should be able to send you its SAQ agent number and officially registered name.

Copy the information onto all required lines.

Note: at any time, you can contact the Business Relations Assistance Service (SARA) to check your SAQ supplier number.

Important!

If you retain the services of more than one agent, be sure to enter the right agent number for each product.

Sending the list

When the list is completed, you should:

- submit it via the Contact Us module with the following category and subject:

*Required Information

Category *	Form
Subject *	Power of Attorney

- Fill out all required fields.
- In the body of the message, enter:

Message *

Bonjour !

SAQ' supplier number and name
SAQ' agent number and name

Please, treated the enclose document

(Your signature)

- Choose the document and attach it.

Attachment(s)
(Maximum of 10 Mo for the set)   [Select attachment(s)]

- Click [Submit] to send the request.

The list will be forwarded to the Fournisseur.amm team for processing.

Revoking a delegation rule

When you change agents or stop doing business with an agent you delegated, you should delete the agent's delegation rule.

Here are the steps to follow.

- [Log into your SAQ-B2B account](#)
- [Access the Delegated Agent section](#).

▸Delegated agents management

Definition and obligation

A delegated agent is authorized to act as the Supplier's representative on SAQ-B2B for the products the agent represents. Delegated agents must have an active SAQ-B2B account under their own name.

By designating an agent, the Supplier agrees that information relating to its activities on SAQ-B2B can be securely and confidentially shared with the agent for use by the agent. The Supplier may withdraw these rights from any agent it has designated. A Supplier may designate more than one agent if desired.

Delegated agents are authorized to performn the following actions on the Supplier's behalf: submit a new product offer as part of the selection process; submit a renewal offer; submit a price change request; and confirm, change and/or refuse an order for products for the SAQ network. The agent can also submit private import requests and renewals, provided it is authorized to do so by the SAQ.

When designating or undesignating an agent, the Supplier is responsible for notifying the SAQ of the change by using the Contact Us form.

Agent

Agent name   Delete

- Click the Delete button.

The Confirm Rule Deletion screen is displayed:

▸Delegation Rules - confirm rule deletion

Are you sure you want to delete the delegation rule?

Yes   No

- If you want to delete the rule, click **Yes**

  - The Delegated Agents Management screen is displayed. The agent's name no longer appears on it.

▸Delegated agents management

Definition and obligation

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By designating an agent, the Supplier agrees that information relating to its activities on SAQ-B2B can be securely and confidentially shared with the agent for use by the agent. The Supplier may withdraw these rights from any agent it has designated. A Supplier may designate more than one agent if desired.

Delegated agents are authorized to performn the following actions on the Supplier's behalf: submit a new product offer as part of the selection process; submit a renewal offer; submit a price change request; and confirm, change and/or refuse an order for products for the SAQ network. The agent can also submit private import requests and renewals, provided it is authorized to do so by the SAQ.

When designating or undesignating an agent, the Supplier is responsible for notifying the SAQ of the change by using the Contact Us form.

Agent

No rules defined.

Add an agent

- If you clicked the Delete button by mistake, click **No**

- When the Delegated Agents Management screen is displayed, the agent's name continues to appear on it.