



supplierportal.biz

SUPPLIER USER GUIDE

This documentation may only be used in accordance of the Terms of Use of the Supplierportal.biz Portal. Any other use, including but not limited to modification, publication and/or public dissemination is forbidden.

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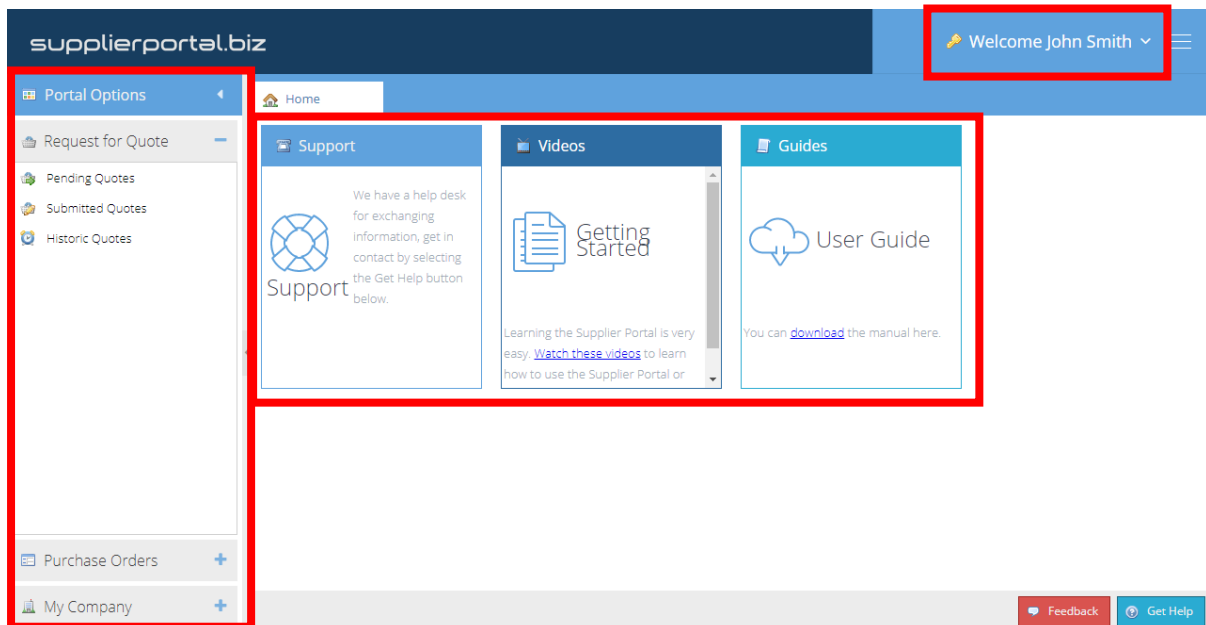
About this Guide

This guide provides detailed instructions for using the Supplierportal.biz Portal from a Supplier's perspective. Please note that some of the functionality described in this guide might not be available as they are defined by your Customer.

Introduction to Supplierportal.biz

Supplierportal.biz is an Internet-based service that supports the exchange of information and transactions between Suppliers and Customers.

Once you log on you will be presented with the following Landing Page.



In the top right-hand corner if you click on the drop-down arrow and click on **My Credentials** you can maintain your personal profile and change your password if necessary.

You can access our training videos and user guides by clicking on the windows in the centre area of the screen.

On the left-hand side of the screen there is a pane which shows all Portal Options. These will be explained in more detail below.

Support and feedback

Product guides and video tutorials are available on the Homepage of the portal. Please explore these areas to familiarise yourself with the tools and functions available for use. For assistance and feedback on using the portal follow the links available at the bottom of the home page as illustrated below.



For support related queries, Supplierportal.biz features a Support Ticking solution which allows feedback to be exchanged between yourself and our Support Team.

To access the Support page. Select the **My Company > Support** link from the left navigation menu.

Creating a ticket

1. Select the **Add Ticket** button, located on the top of the page.
2. Enter a detailed description, describing the related issue.
3. A ticket number will be generated, and our Support Team will attend to your query.

Feedback on Support

You will be notified by email once feedback on your query is posted. This will also be available on the Support page, by selecting your Ticket.

 The screenshot shows the 'Add Ticket' button at the top left. Below it is a table with two columns: 'Ticket Id' and 'Date'. A single row is highlighted in yellow, showing '5' and '2017-08-20 10:03'. Below the table is a pagination bar with 'Page 1 of 1' and 'Displaying 1 - 1 of 1'. The 'Detail' view for the selected ticket is shown below, featuring 'Add Feedback' and 'Close Ticket' buttons. A table below these buttons shows the user 'JOHN@SAM...', the date '2017-08-20 10:03', and the comment 'How do I add additional users from my organisation to respond to RFQ's'.

Ticket Id	Date
5	2017-08-20 10:03

User	Date ↓	Comment
JOHN@SAM...	2017-08-20 10:03	How do I add additional users from my organisation to respond to RFQ's

To add additional feedback, select the **Add Feedback** button above the Ticket Detail. Alternatively select the **Close Ticket** button to indicate that the issue has been resolved.

My Company

The **My Company** Section allows you to maintain offerings your organisation provides, log support tickets and maintain additional users within your organisation.

Settings

The settings section allows you to manage and maintain your company profile settings. Fill in the relevant information and select the **Save** Option.

The screenshot shows a web interface with two tabs: 'Company Details' (active) and 'Attachments'. Below the tabs is a 'Save' button. The 'Company Details' section contains the following fields:

- Company: Code (input field) and Company Name (input field)
- Currency: Currency (input field)
- Email Address: (input field)
- Phone: xxx-xxx-xxxx (input field) and Fax: xxx-xxx-xxxx (input field)
- Inco: Select Inco... (dropdown menu)

The 'Address' section contains the following fields:

- Street Address: (input field)
- City: (input field) and State: (input field)
- Postal Code: (input field)
- Country: Select Country... (dropdown menu)

Attach any necessary Statutory Documentation on the **Attachments** Tab.



Click on the Paperclip icon to attach a File. Click on the File icon to view an attached file.



When attaching a file, specify an expiry date, provide a comment and click on **'Browse'** to attach your file.

Then click on **'Save'**.

The screenshot shows a dialog box titled 'Attach' with a close button (X) in the top right corner. The dialog box contains the following fields and buttons:

- Expiry Date: (input field with a calendar icon)
- Comment: (input field)
- File: (input field with a paperclip icon) and a blue 'Select' button
- A blue 'Save' button at the bottom right of the dialog box

Commodities

If the **Commodities** section is available to your customer, you will be allowed to specify commodities related to your customer that you provide.

To specify these commodities:

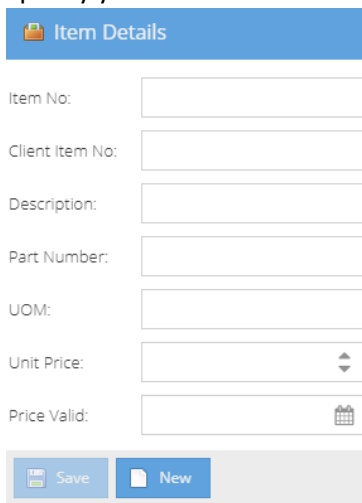
1. Select your **Customer** from the dropdown
2. Select one of your **Companies**, if more than one is available from the Dropdown
3. A list of related commodities for your selected customer will be presented. Tick box all related commodities.
4. Select the **Save** button.

My Catalogue

The **Catalogue** section allows you to upload your product listing to the portal to be explored by your customers.

To Add a Product

1. Select a **Customer**
2. Select one of your **Companies**, if more than one is available from the Dropdown
3. Select **New Item**
4. Specify your Item Details on the left pane within this page



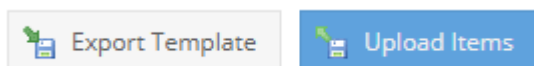
The **Client Item No** will represent your Customers Internal number. This is not a mandatory field.

5. Select **Save**

To Remove a Product

1. Locate the item on the listing and select the **Delete Selected** Button located on the top toolbar

If you would like to do a bulk upload of your catalogue click on the **Export Template** button shown below. Populate the required information on the template and import it back on to the portal using the **Upload Items** button shown below.



Users

Supplierportal.biz allows you to maintain additional users within your organisation who can provide feedback and update transactions. This is only available to the primary users of an organisation.

To Maintain Users, select the **Users** Menu located under the My Company Section

Adding a User

1. Select the **Add User** button located on the top toolbar
2. A pane will appear on the righthand side of the page allowing you to enter the **User** details. Specify the **User** details and contact information.
3. Select **Save**
4. The newly created user will be notified by email as a new user with password details as defined within this view.

User

User Details

Email:

First Name: Last Name:

Disabled?:

Contact Details

Job Title:

Office:

Office Phone:

Mobile Phone:

Fax Number:

Street Address:

City:

State: Postal Code:

Country:

Password

Auto-generate password?: Let me create the password:

Make this user change their password when they first sign in?:

Maintaining Users

To maintain a user, select a user from the user listing. Update related information on the right pane and select **Save**.

Disabling Users

To disable a user, tick box the **Disabled** field for the user as described in Maintaining Users or alternatively select the Disabled icon within the Users listing view.

Please note that one cannot remove users and can only disable them.

Request for Quote

Request for Quote is available with the following 3 menu options:

1. **Request For Quote**, Requests received but not submitted
2. **Submitted Quotes**, Quotes submitted but still available as the closing date and time has not yet lapsed
3. **Historic Quotes**, Listing of all requests

Adobe Flash might be required for this function. If not available, you will receive a notification. To install Adobe Flash, visit: <https://get.adobe.com/flashplayer/>

Responding to a Request for Quote

You will be notified by email once a new request has been published by your customer. Navigate to the **Request For Quote section** under the Request for Quote area.

This view will display all documents that are currently awaiting quotes.

Please note the expiry date and time information that is displayed for each document. When the closing date and time is reached, you will no longer be able to respond to the RFQ.

Reference	Publish Date	Expiry Date ↓
Customer: Test Company (1 Item)		
PR000003	2017-08-12	2019-12-12 12:00
<i>Shaft Rehabilitation</i> Thu Dec 12 2019 00:00:00 GMT+0200 (South Africa Standard Time)		

For a Quote, there might be different options available for entry, these might include:

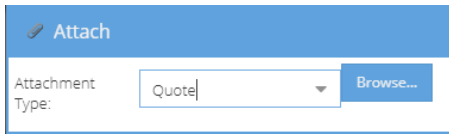
1. Quote Detail, listing of the items on the request allowing you to enter pricing etc.
2. Attachments, a list of attachments for this request, either from the customer buyer or uploaded by you.
3. Checklist, represents compliance checklists to be completed.
4. Buyer Chat, allowing you to exchange messages with the Customer Buyer.

To Enter a Quote

1. Select a Request from the list.
2. You might be required to accept the Terms and Conditions for this Quote.
3. Enter Inco Term, location and Comment if applicable
4. Enter your Leadtime, Discount and Unit Price per line item by clicking on the relevant field.

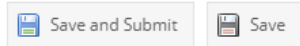
UOM	Quantity	Leadtime	Discoun...	Unit Price	Total
EA	1	15	10	200.00	180.00

5. Add attachments. In some instances, attaching a quote or other required files might be required. Select the Add Attachment Button, select an attachment type from the dropdown and browse for your file.



Please note that only PDF file types are allowed.

6. Compliance Checklist might be required, select the relevant item and enter an optional comment.
7. When saving your Quote, there are 2 options available. "Save" and "Save and Submit".



The "Save" option allows you to save your entered details without submission which can be reviewed later. The "Save and Submit" option will save and submit your response.

Please note that the document will still be available under Submitted quotes until the Closing Date and Time has been reached for modification.

Once the Closing time has been reached, the request will be available under Historic Quotes

Sending Messages to the Buyer

You can send messages to a customer buyer from a selected Request. Within this view sent and received messages are displayed.

To send a message:

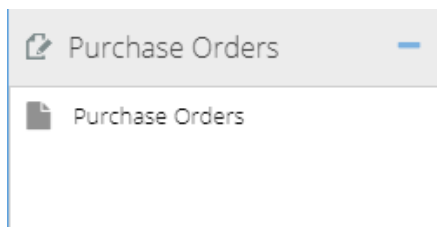
1. Open a Request from Request for Quote
2. Select the Buyer Chat tab
3. At the bottom of this view, enter a message and select Send



4. The Customer Buyer will receive a notification with your message
5. If the Buyer sends a message, you will be notified by email and this message will also appear in the Buyer Chat view.

Purchase Orders

Some Purchase Orders might be published to the portal. These can be viewed by selecting the Purchase Order menu.



Within this view a listing of Purchase Orders, with an indicator of acceptance will be presented.

Purchase Orders			
Customer	PO Number	Accepted	Date ↓

On selection of a Purchase Order, you might be required to accept the Purchase Order Terms and Conditions.

- **Accepting a Purchase Order**

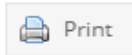
1. Select a Purchase Order from the list
2. Tick box Accepted Purchase Order and Click Accept

Accepted Purchase Order?:

Accept

- **View Purchase Order**

1. Select a Purchase Order from the list
2. Click the Print Button



Please note that some Purchase Orders might not reflect recent changes, consult your customer directly for these details.