SUPPLIERS ON-BOARDING USER MANUAL

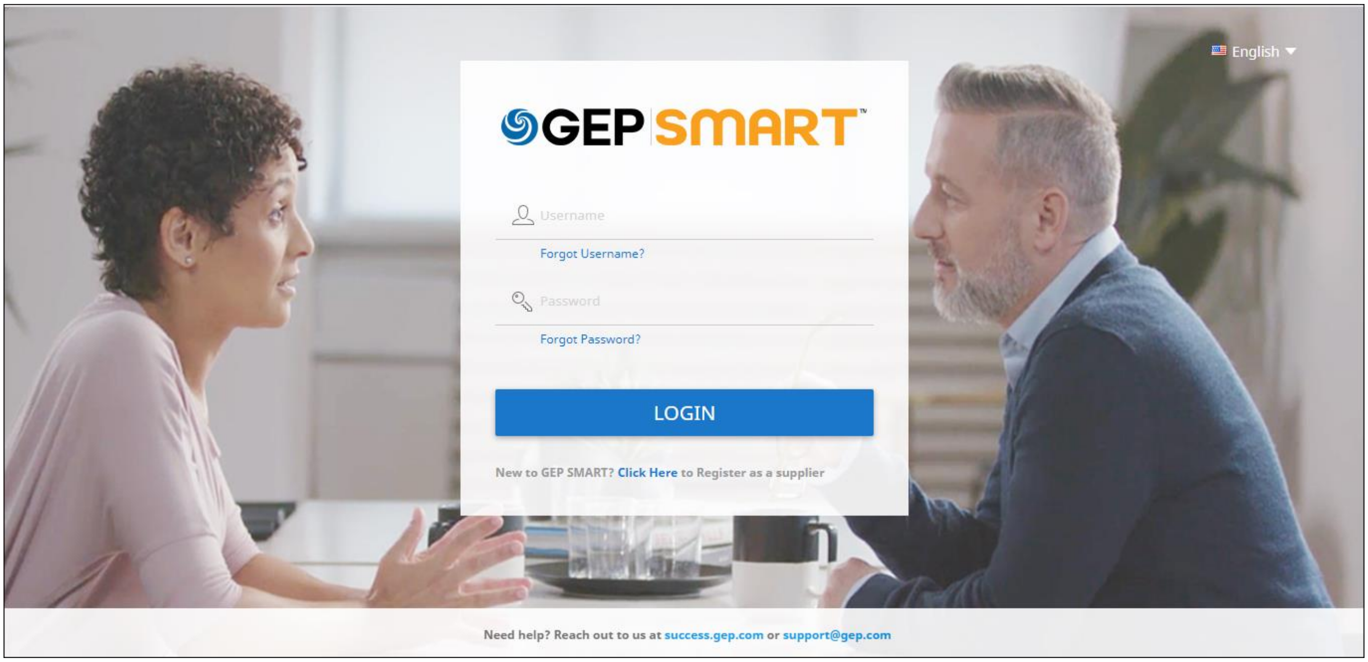
Table of Contents

Chapter 1: Getting Started

The GEP SMART® e-procurement software platform enables you to automate and manage your sourcing and procurement tasks. You can access GEP SMART® on any device such as a PC, laptop, tablet, or mobile phone.

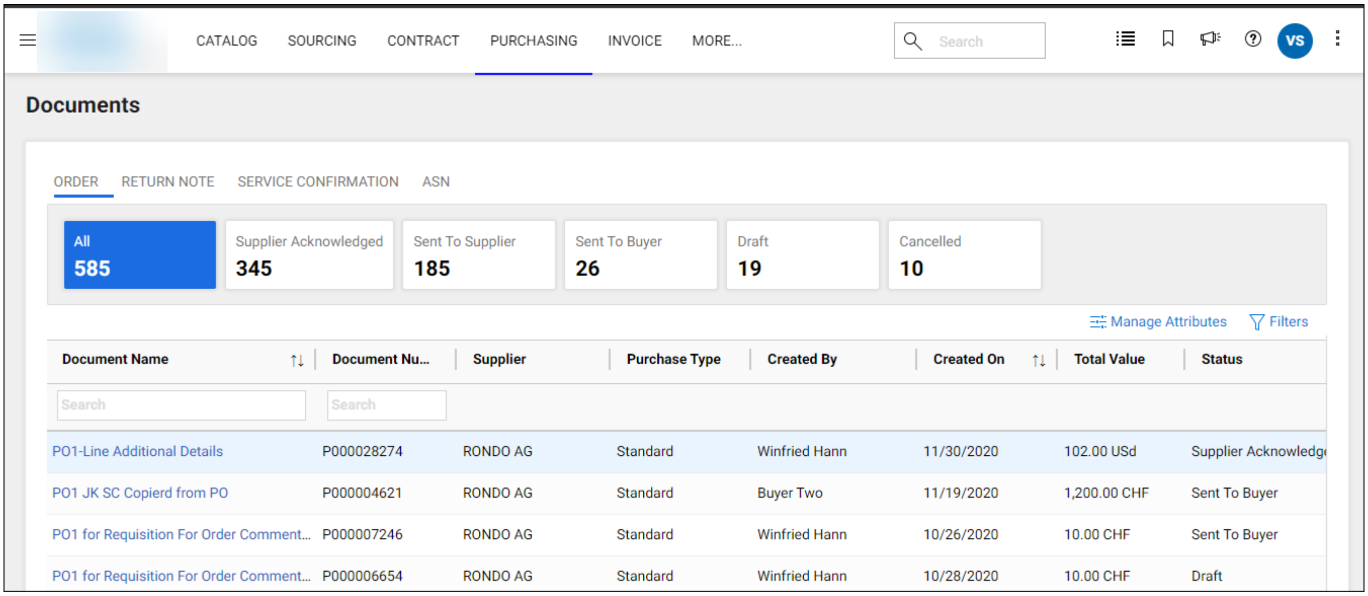
1.1 Logging into GEP SMART®

To log into GEP SMART®, type your username and password, and click **Login.**



After authentication of login details, the following profile page is displayed.

The home page is displayed as follows:



1.2 Logging out of GEP SMART®

On the Home page, in the upper-right corner of the page, click the Navigation icon and then click Logout icon.

Chapter 2: Supplier Registration

The Registration Information tab has relevant registration fields that are available upfront to you; you do not have to go into the registration form to view responses. However, you can update the information anytime.

Supplier management module also assists in:

- Profile management: Maintaining all supplier details at one place
- Self-evaluation of performance
- Participation in corrective action plans.

The following guide will help you navigate through the application and make effective use of its various features and capabilities.

You can register into GEP SMART using one of the following ways:

- The buyer organization may publish the registration link on its website from where you can access the Primary Registration Form.
- The buyer may invite you to fill the Primary Registration Form. In that case, you will receive the below email with the registration link:

Dear Robert Owen,

Gep has sent you its primary registration form. In order to start filling it, you just need to
Click Here
Please enter the responses and submit the form. The login credentials would be created on submission and you can then access the system.
Please note that the supplier manager(s) assigned to Edison Ltd is/are GEP Admin.

In case of any queries, please contact GEP Support at the following:

Phone:

USA: +1 732 428 1578

Asia: +91 22 61 372 148

Europe: +42 022 59 86 501

Email:

Support@gep.com

Regards,

GEP

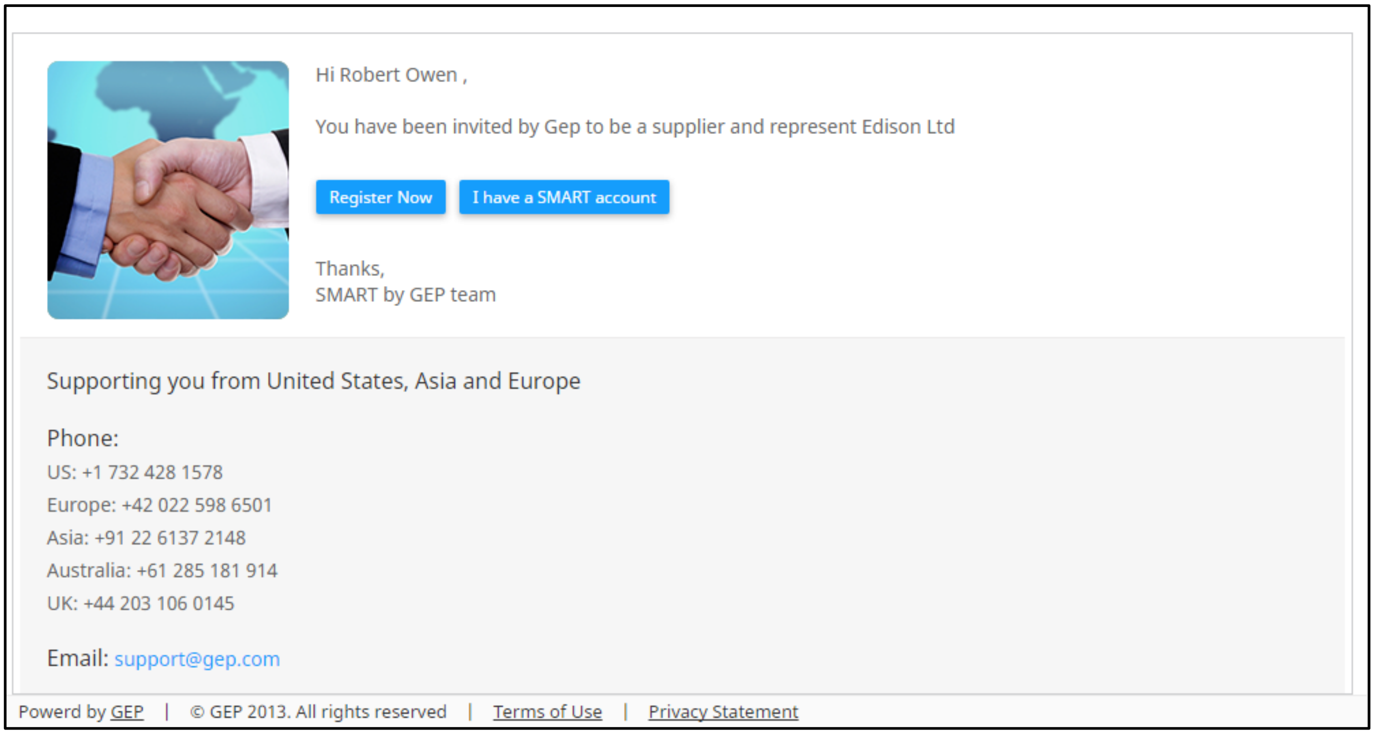
To Avoid emails going to spam or junk folders

To ensure you receive all emails from support@gep.com in your inbox, please mark this email address as safe. Sender email address can be marked safe by adding it in the safe senders list, contacts list or your address book.

To complete the registration:

1) Click **Click Here** to open the new account registration page.

You can view the options, Register Now and **I** have a SMART Account.



Hi Robert Owen ,

You have been invited by Gep to be a supplier and represent Edison Ltd

Register Now | I have a SMART account

Thanks,
SMART by GEP team

Supporting you from United States, Asia and Europe

Phone:
US: +1 732 428 1578
Europe: +42 022 598 6501
Asia: +91 22 6137 2148
Australia: +61 285 181 914
UK: +44 203 106 0145

Email: support@gep.com

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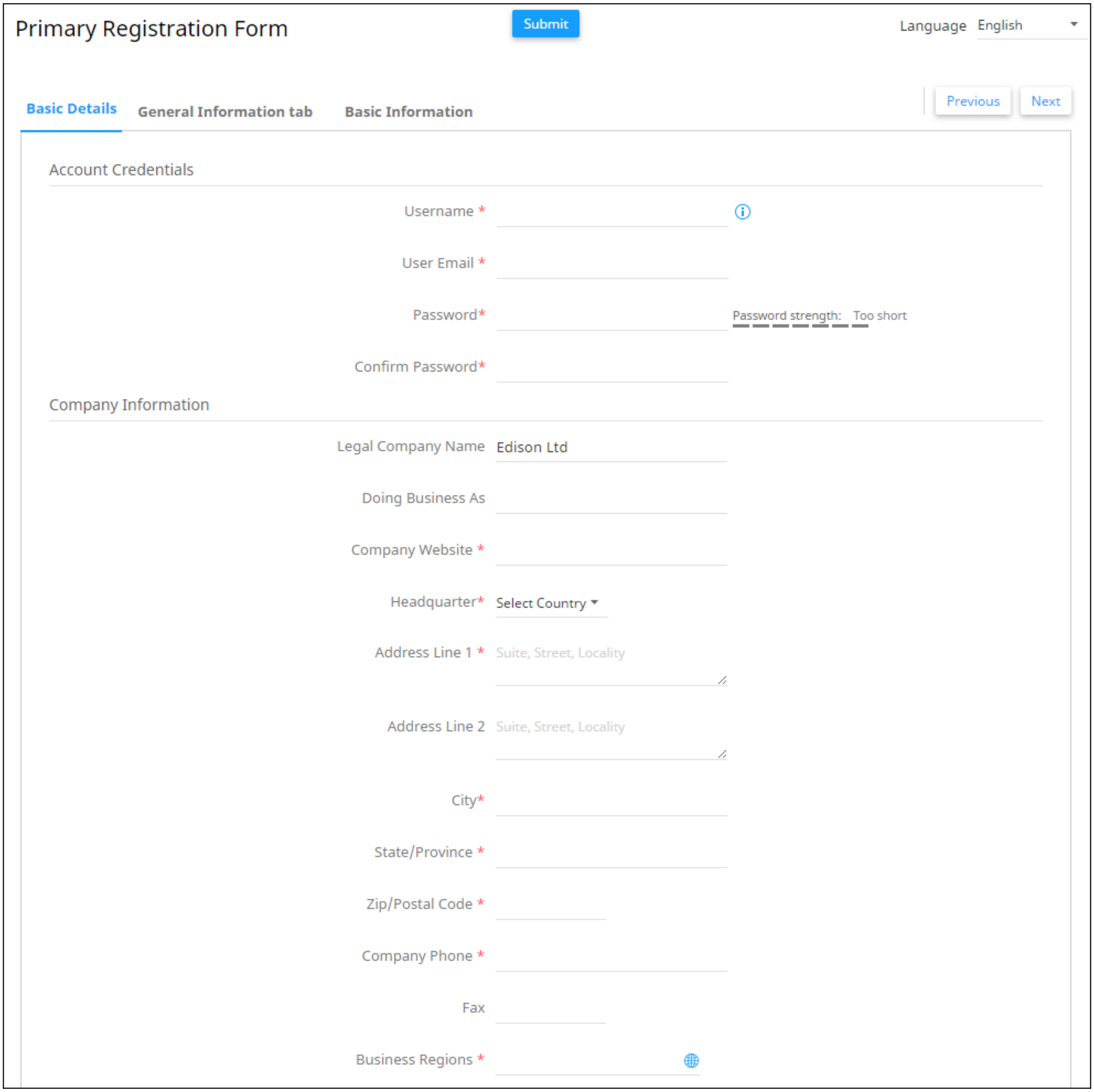
2) In case you already have a SMART account click **I have a SMART account** and enter your login credentials.

OR

Click on **Register Now** to open the Primary Registration Form (PRF). Enter the details in the form to complete the registration process.


Primary Registration Form

Submit

Language English

Basic Details | General Information tab | Basic Information

Previous | Next

Account Credentials

Username *

User Email *

Password* Password strength: Too short

Confirm Password*

Company Information

Legal Company Name Edison Ltd

Doing Business As

Company Website *

Headquarter* Select Country

Address Line 1 * Suite, Street, Locality

Address Line 2 Suite, Street, Locality

City*

State/Province *

Zip/Postal Code *

Company Phone *

Fax

Business Regions *

3) Fill out the details in the **Basic Details** tab. Based on buyer's organizational requirement, the buyer can add more tabs to this form and then click **Submit**.

The following page appears:

Congratulations!!!

A verification link has been sent to the registered email ID, please use the same to verify the account. If already done please ignore.

You have successfully submitted the registration form and can now access SMART by GEP.

Click Here to login

If you have any questions, please Click Here to find helpful information to get started.

Thanks,
SMART by GEP team

Supporting you from United States, Asia and Europe

Phone:
US: +1 732 428 1578
Europe: +42 022 598 6501
Asia: +91 22 6137 2148
Australia: +61 285 181 914
UK: +44 203 478 6123

Email: support@gep.com

4) Click on the verification link you received in your email. Only once the verification is completed, you can login to GEP SMART.

Congratulations!!!

You have successfully activated your account.
Now you can log on to SMART by GEP to get some great benefits which will help you grow your business further.
Click Here to login

Thanks,
SMART by GEP Team

Supporting you from United States, Asia and Europe

Phone:
US: +1 732 428 1578
Europe: +42 022 598 6501
Asia: +91 22 6137 2148
Australia: +61 285 181 914
UK: +44 203 478 6123

Email: support@gep.com

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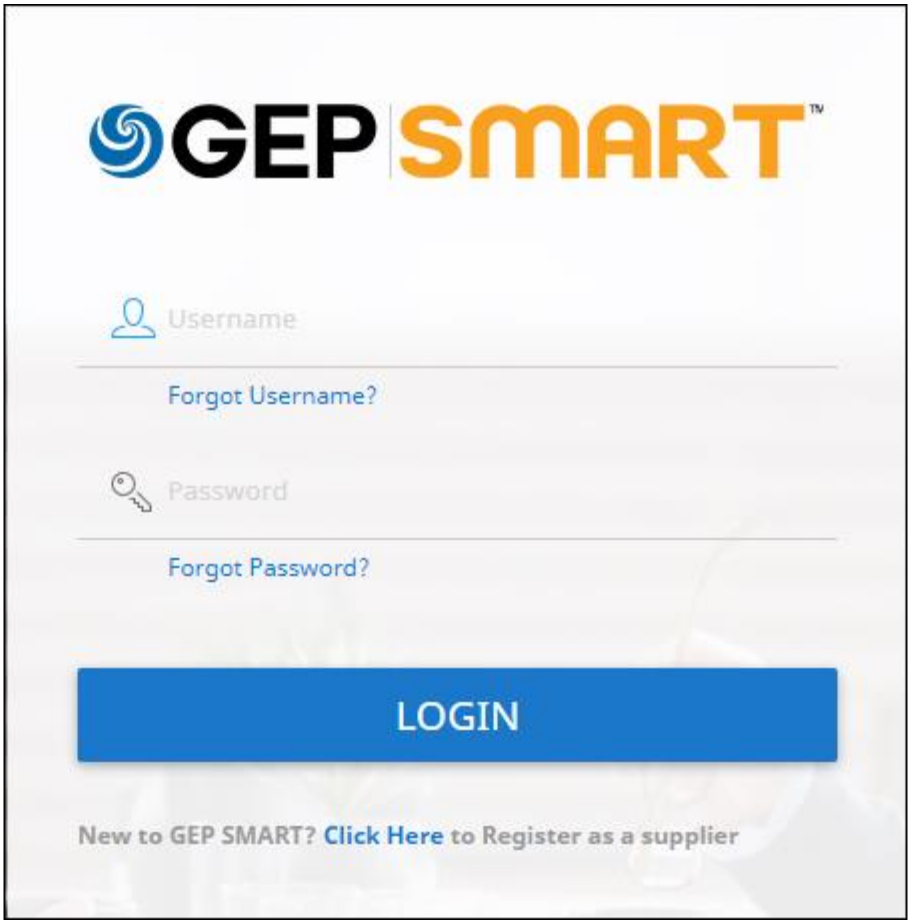
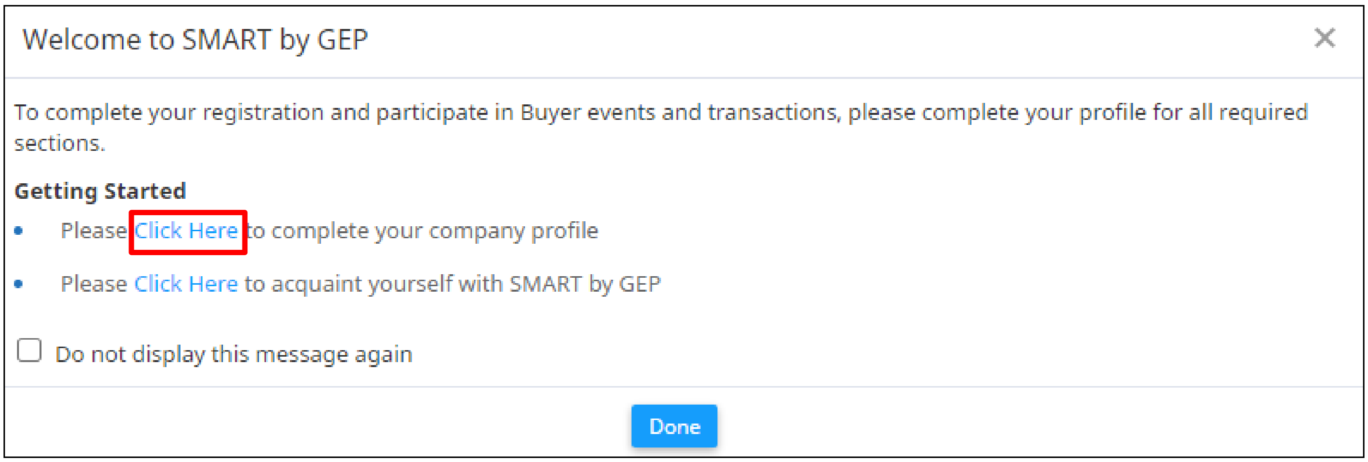
Once you verify your account the below screen appears:

5) Click **Click Here** to login to GEP SMART system and complete your profile.
You can login to the tool with the Username and Password created in the Primary Registration Form.



Chapter 3: Profile Completion

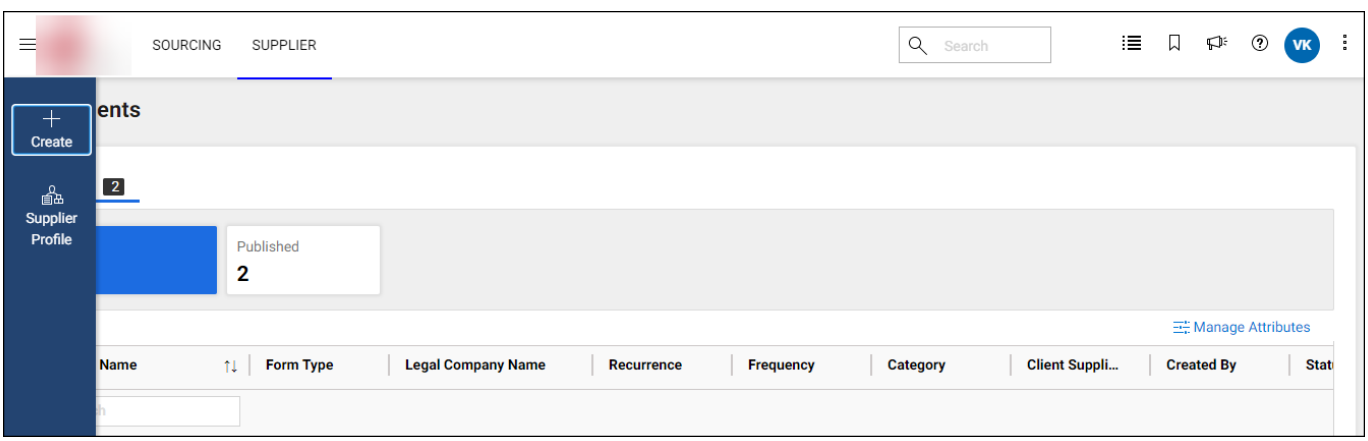
On successful login, you can view the following Welcome to GEP SMART pop-up:



Click **Click Here** to complete your company profile. The company profile page appears.

After you login to GEP SMART, you land on the home page. You can access your supplier profile from the home page as shown below:

Click the icon and then click Supplier Profile, to update the details.



You can add or update the details on this page. This page contains the following tabs.

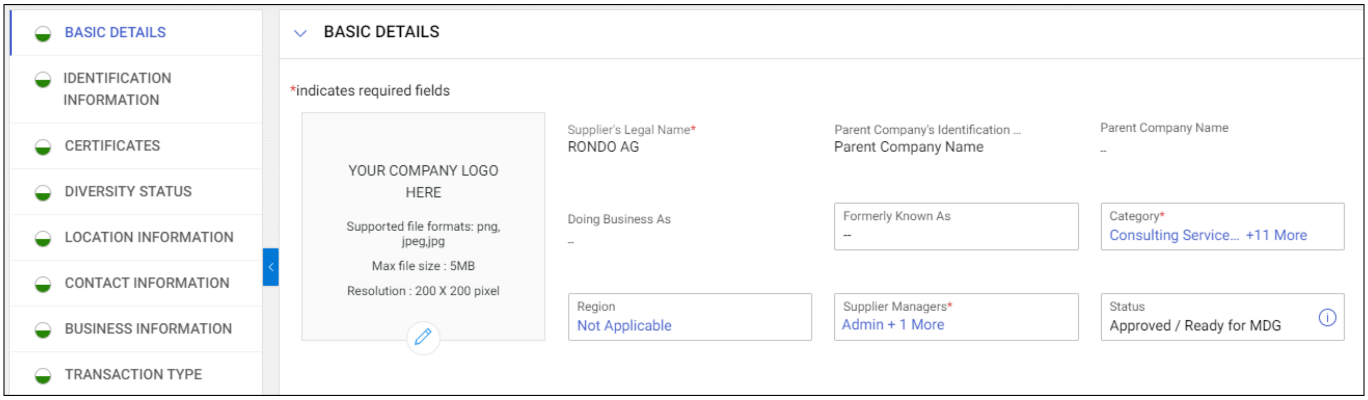
- Basic Details
- Identification Information
- Supplier Source Information
- Certifications
- Diversity Status

- [Registration Information]
- [Location Information]
- [Contact Information]
- [Business Information]
- [Transaction Type]
- [Marketing Information]
- [Payment Terms]
- [Documents]

3.1.1 Basic Details

The Basic Details section on a supplier's profile consists of basic information like the name, parent supplier company, and category/region the supplier caters to.

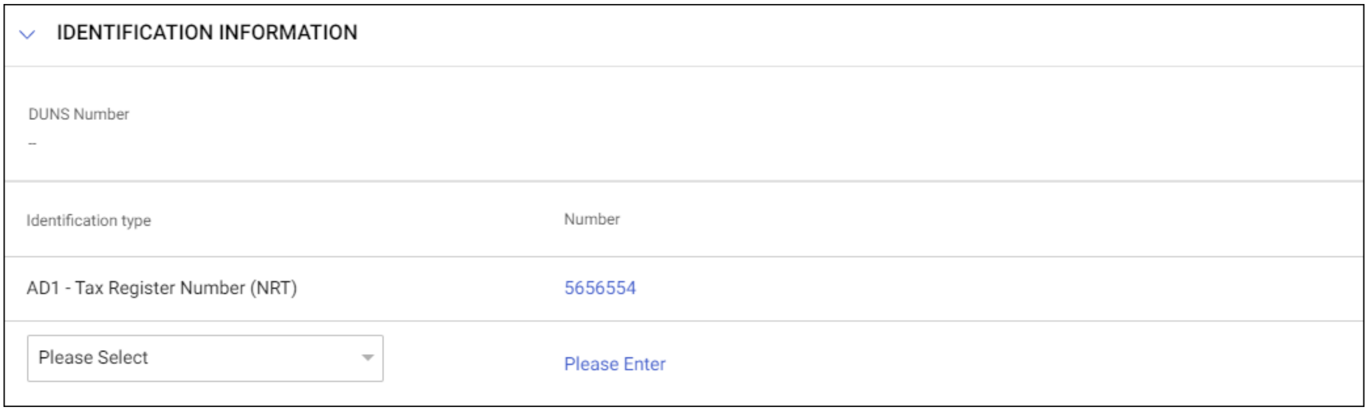
The information on the Basic Details section is displayed as shown below:



3.1.2 Identification Information

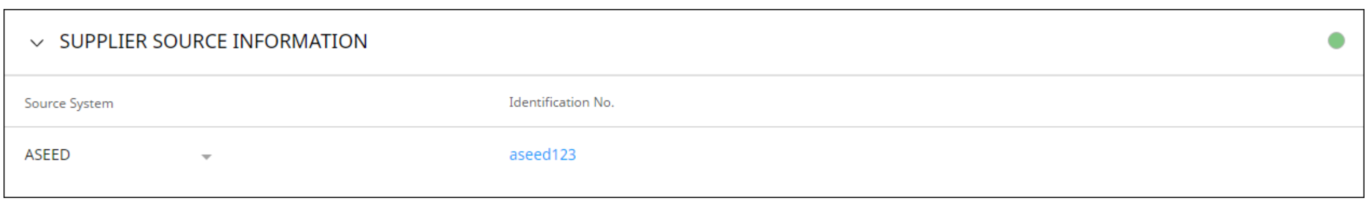
The Identification Information section holds your identification information such as the identification type and number.

Click the add and delete the identification information click the icon and the icon.



3.1.3 Supplier Source Information

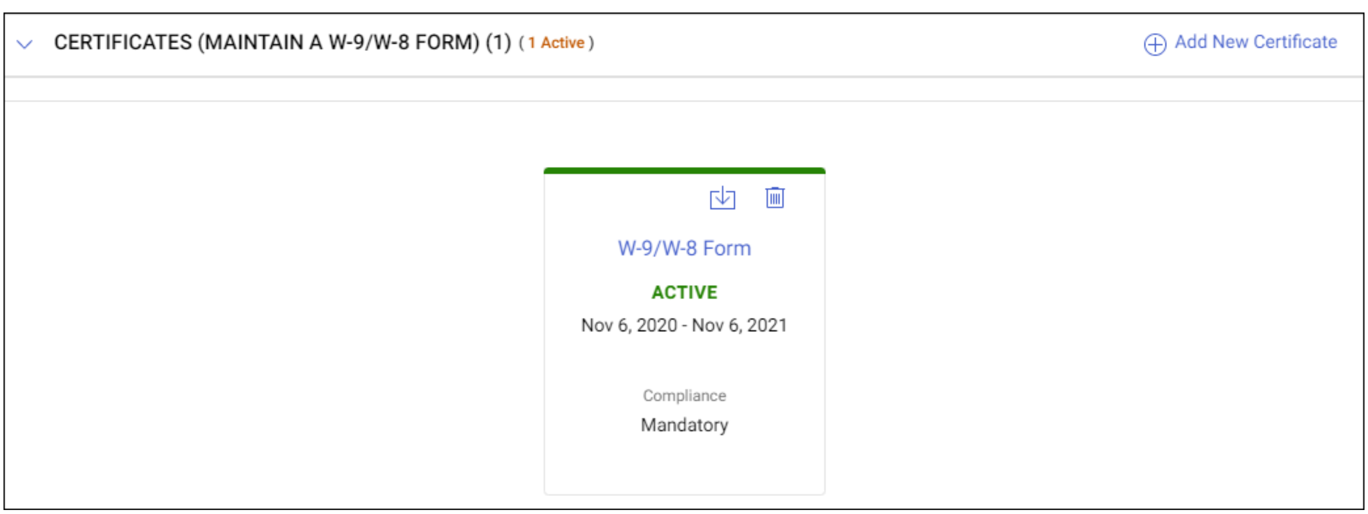
The Supplier Source Information section holds your source type and the identification information for the supplier. You can only view the information in this section.



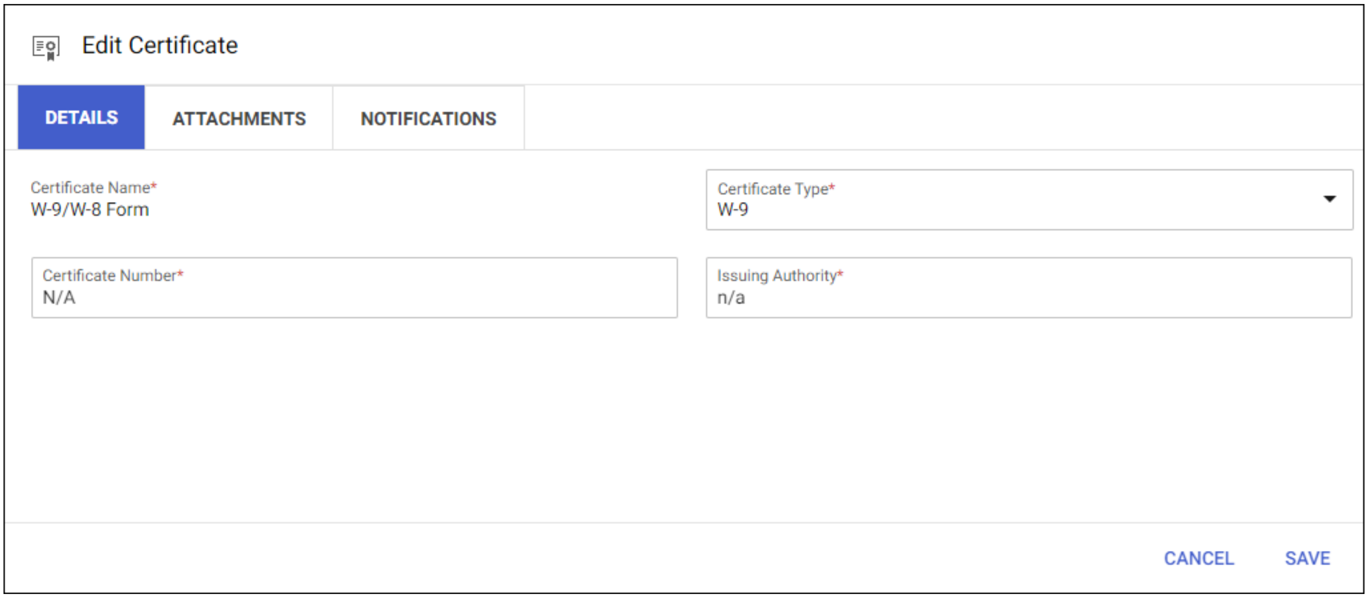
3.1.4 Certifications

Certificates are useful for compliance and for sourcing events. The Certificates section displays all your certificates.

The information is displayed on the Certifications section is as shown below:



To update an existing certificate, click the certificate name, the Edit Certificate pop-up apperas.



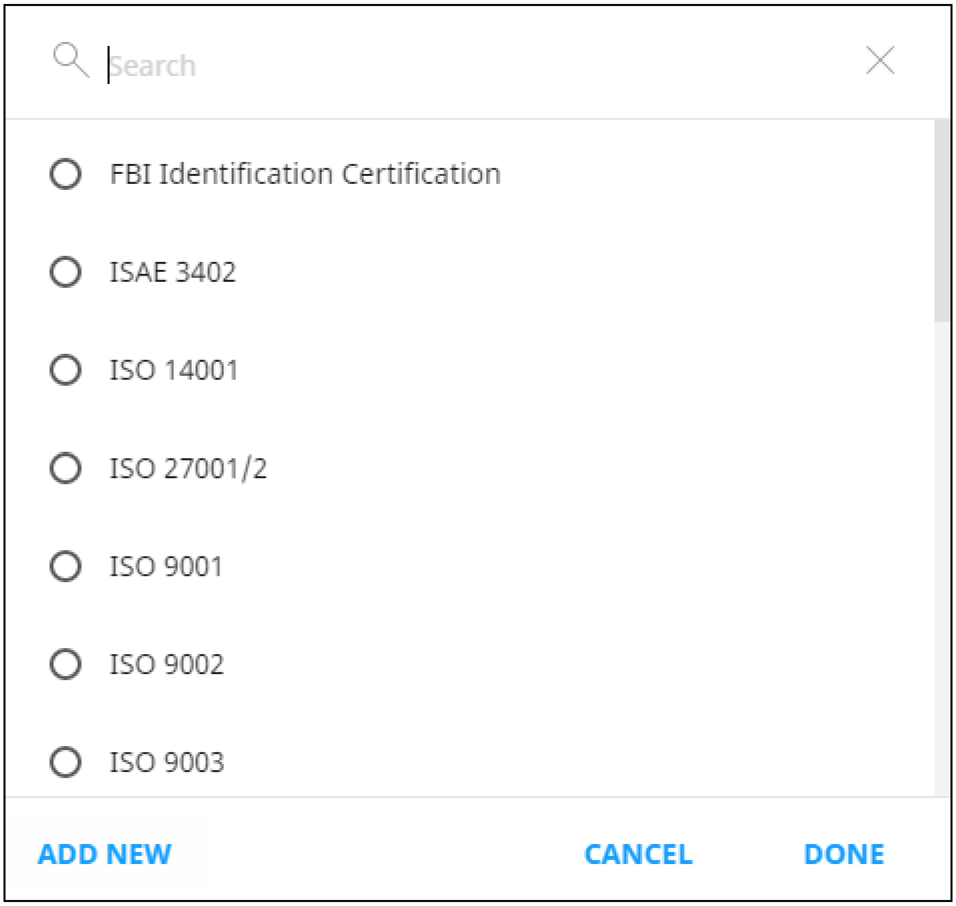
For information on how to edit the certificate refer [Adding a Certificate]

3.1.4.1 *Adding a Certificate*

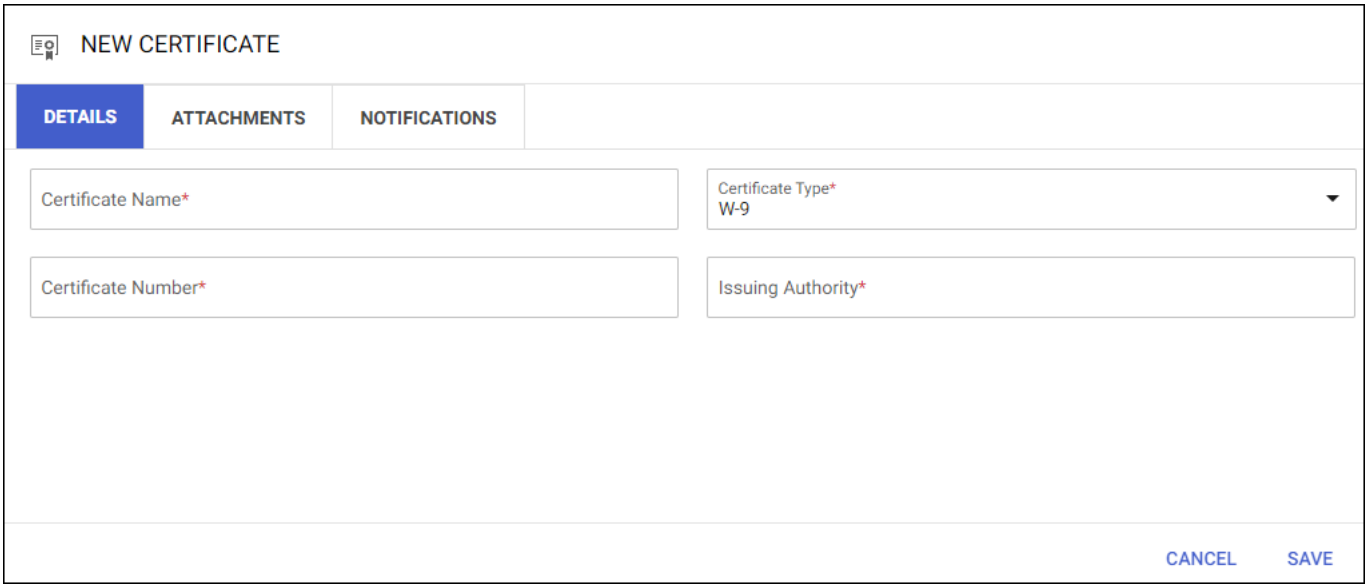
To add a certificate:

1) In the Certificate section, click the Add New Certificate 

icon and select the required certificate from the list of standard certificates provided and then click **Done**.



2) In case you want to add a new certificate other than the standard ones, click **Add New.**



On the New Certificate dialog, enter your details in the Details tab.

On the Attachments tab, click the **Add Attachment** link to attach the certificate to Suppliers Management. Set the effective duration of the certificate and click the **Upload Document(s)** button to upload a copy of the certificate.

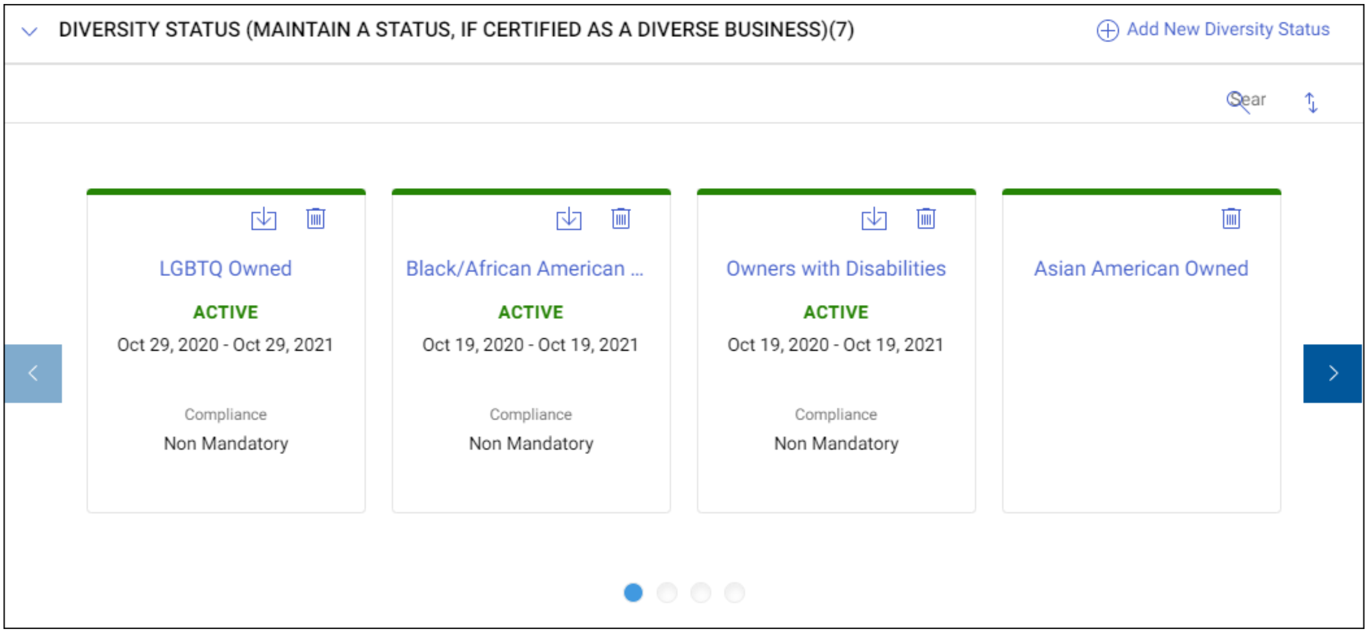
Note

Certificates can be configured to be mandatory for compliance. In such cases, once a certificate expires, your status changes to non-compliant and will only change back to the original status after a new certificate is uploaded.

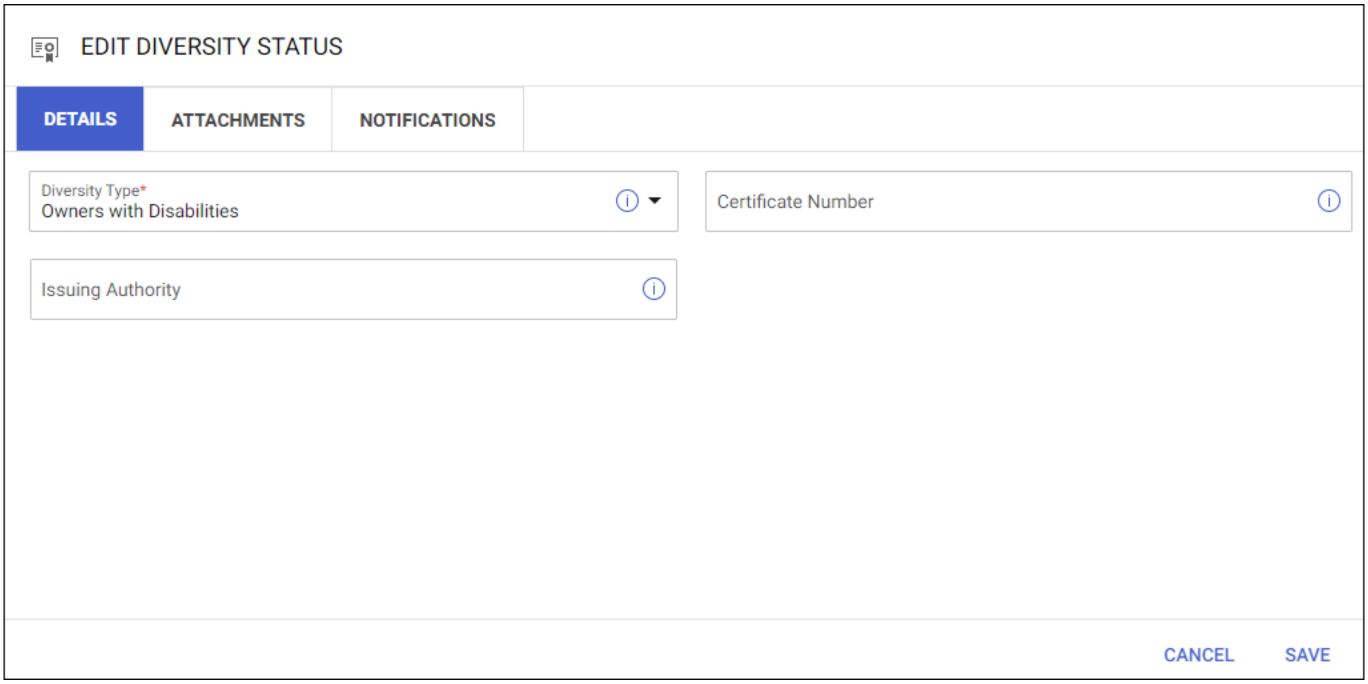
3.1.5 Diversity Status

The Diversity Status section offers several benefits of working with diverse suppliers. The Diversity Status area helps you the buyer mark suppliers for their diversity.

To assign diversity status, on the Diversity Status section, locate and select the required diversity status.



To update an existing diversity status, click the diversity status name, the Edit Diversity Status pop-up apperas.



On the Edit Diversity Status dialog, enter your details in the Details tab.

On the Attachments tab, click the **Add Attachment** link to attach the certificate to Suppliers Management. Set the effective duration of the certificate and click the **Upload Document(s)** button to upload a copy of the certificate.

3) Specify the required details and click **Save**.

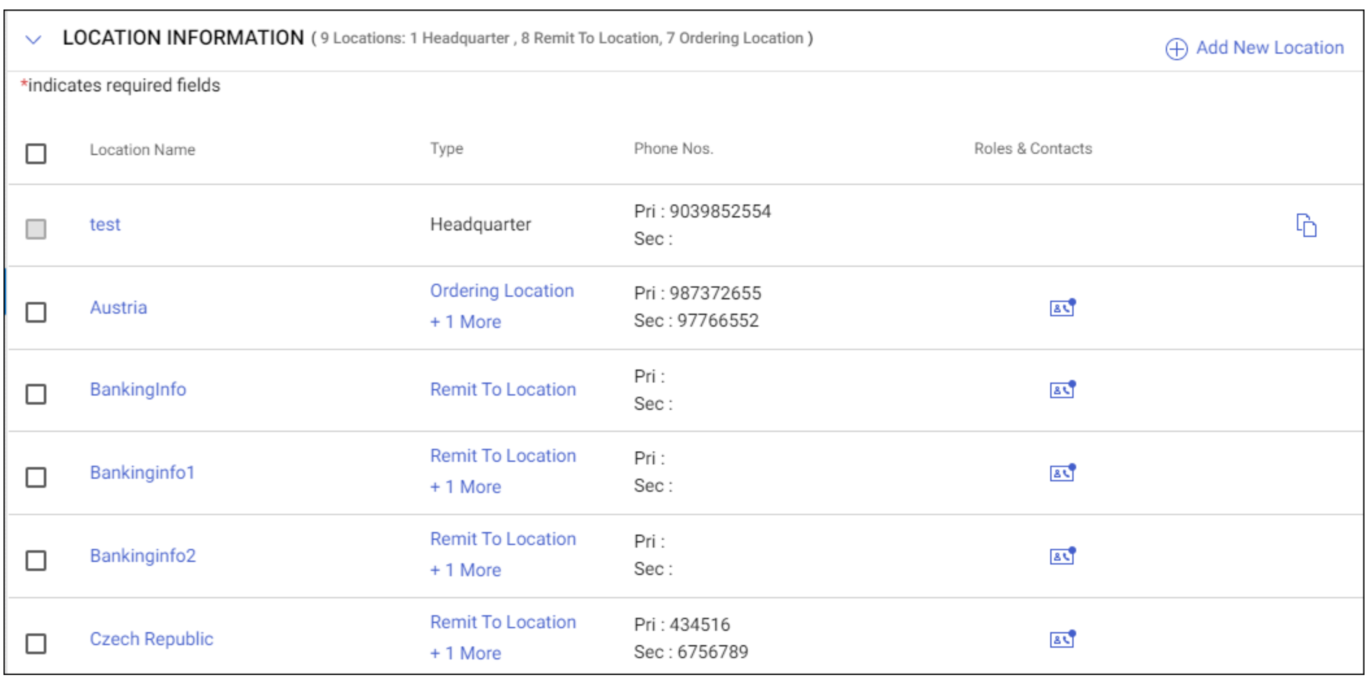
3.1.6 Registration Information

The Registration Information section holds your response to the primary registration form. This is client configurable.

The information on Registration Information tab is displayed as shown below:

3.1.7 Location Information

On the Location Information section, the Location area holds all the locations that you operate from. You can use this section to capture and maintain the location database. Additionally, you can also manage your default location.



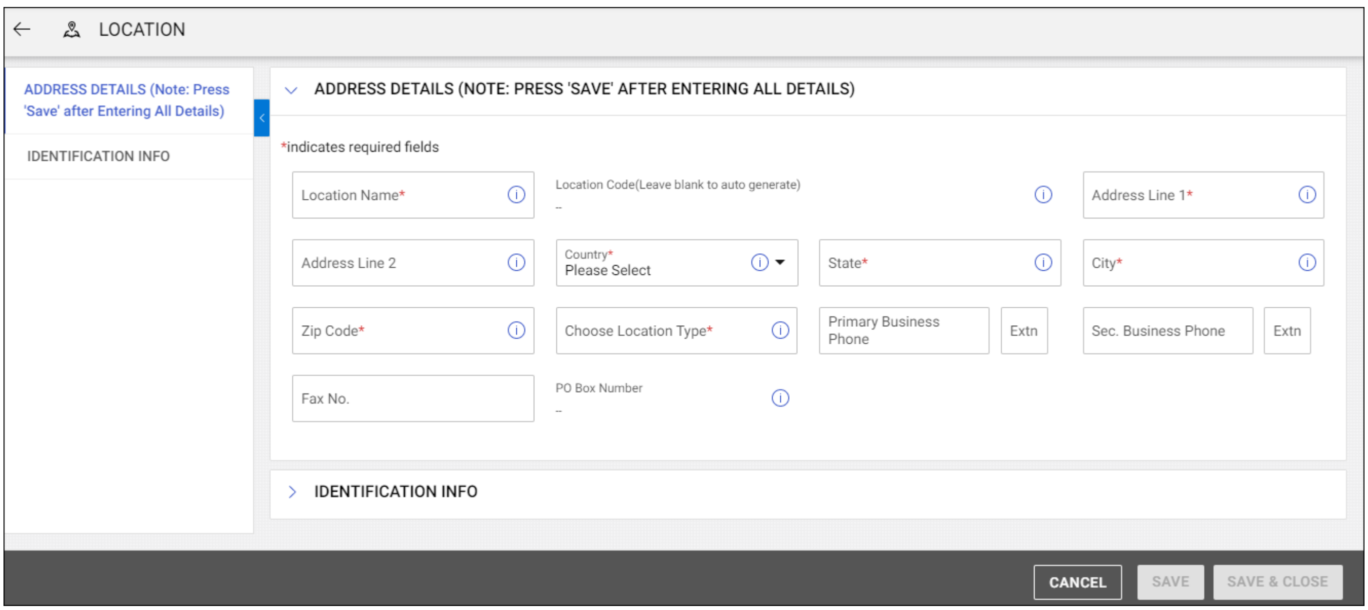
- To delete the location details, select the location details and click Delete icon.

- To edit the location details, select the location details and click Edit icon. For more information refer Adding a Location
- To copy the location info, click Copy As icon, and select the location type to which you want to copy this information.
- To apply a role to the user, click Role & Contacts icon to update the role and contact information.

3.1.7.1 *Adding a Location*

To add a location:

a) On the Location Information section, click the Add New Location Add New Location icon.
b) Select the location type you want to add information. For example, select any location type.



c) On the Location pop-up, specify the required details on the Address Details tabs and click **Save**.

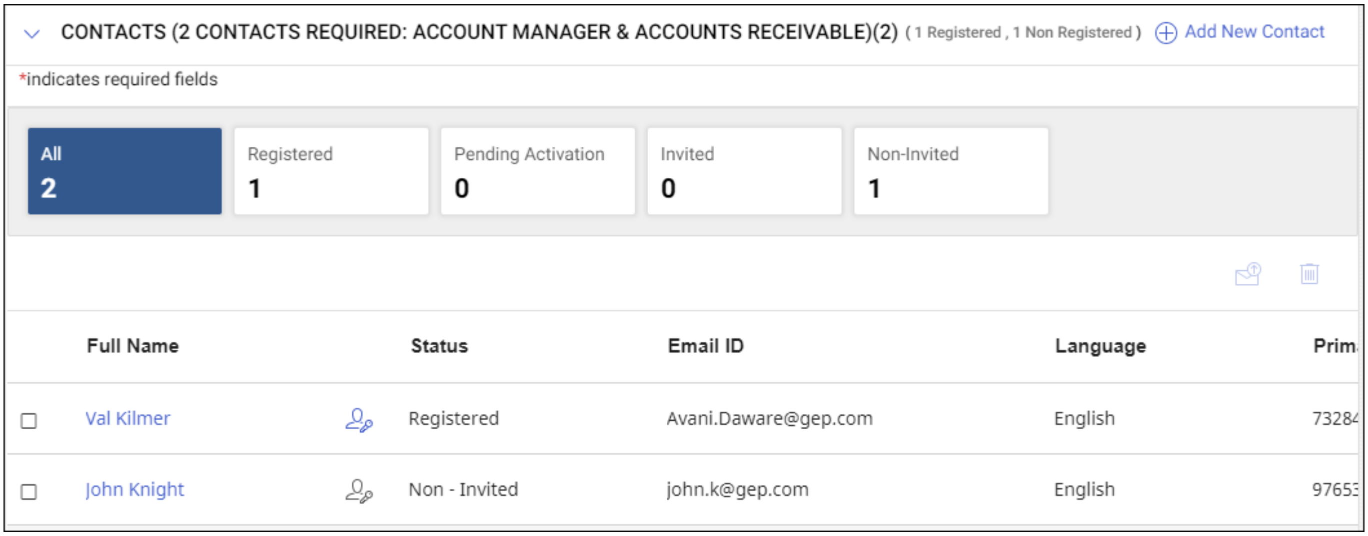
Note

- *Based on configuration of your product, you may have more options available at the location level such as Identification Details.*
- *Based on configuration of your product, you may have more options available for location type at location level. Location type could be for remittance, order, solicitation, etc.*

Select **Default to Remit to Location,** if you wish to make this location as default remit to location.

3.1.8 Contact Information

The Contact Information section holds all your contact details. The information on the Contacts section is displayed as shown below:



- To invite a contact, click Invite icon, the invitation is sent to the supplier contact. The supplier will receive an email notification with the link to register to GEP SMART.
- To delete a contact, click Delete icon.

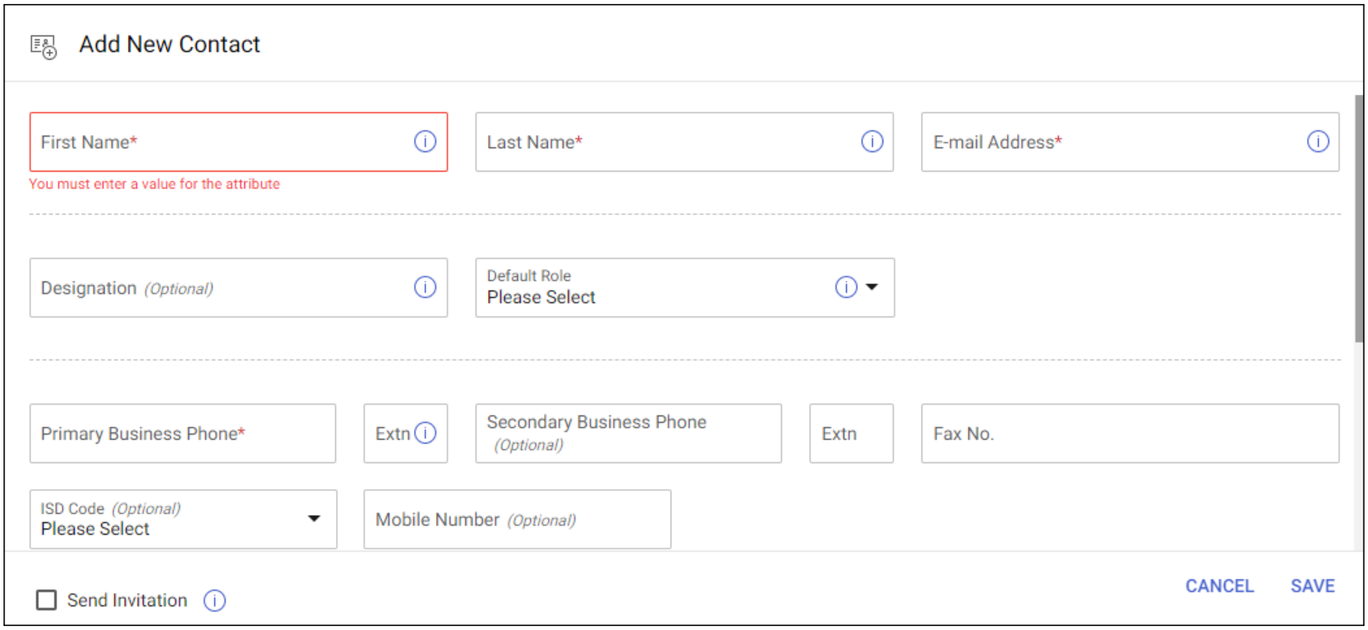
By default, the primary contact is listed as a contact. See Adding Contacts for information on how to add new contacts.

- To Edit a contact, refer Adding Contacts.

3.1.8.1 *Adding Contacts*

To add a new contact:

1) Click the **Add Contact** Add New Contact icon.



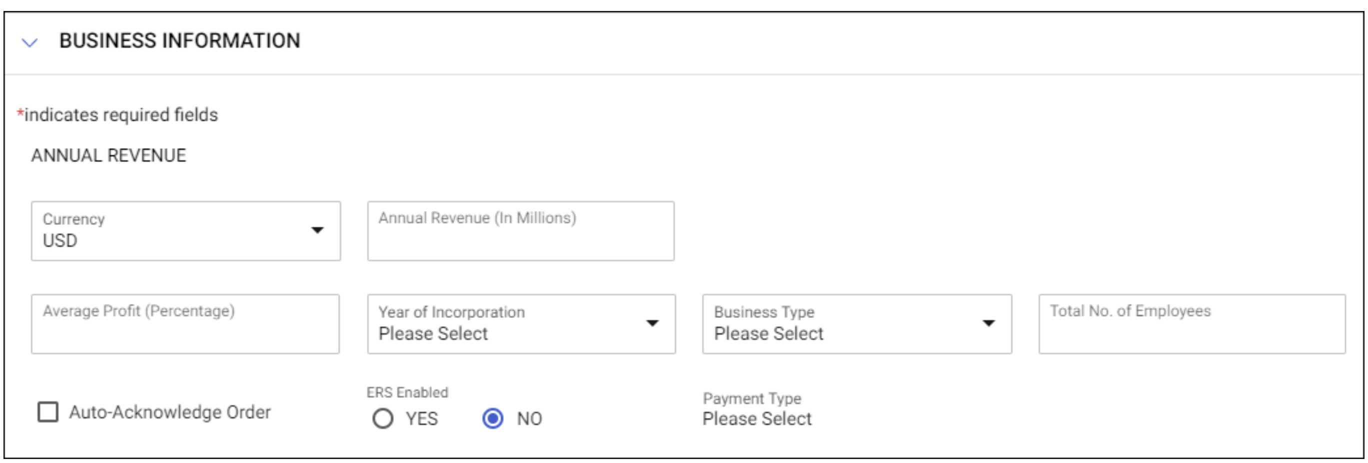
2) Specify the required details and click **Save.**

Note

From the list of contacts, click the icon next to the required contact to identify the primary contact.

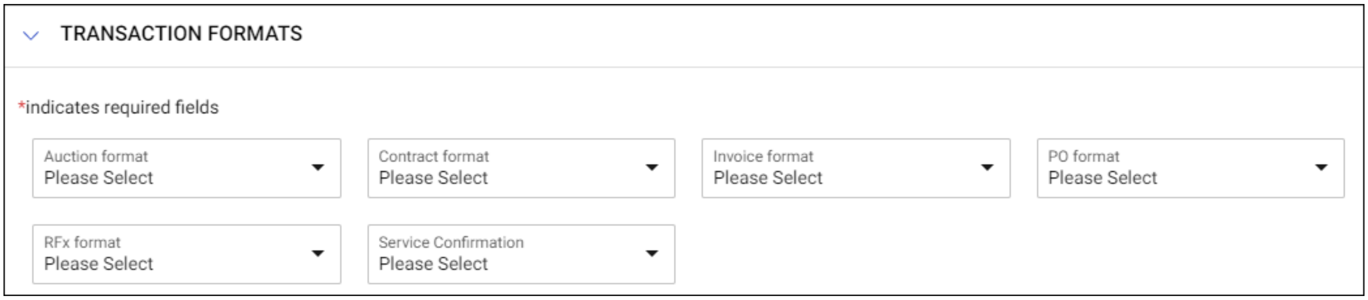
3.1.9 Business Information

The Business Information section captures various business details including business locations, revenue, profit, etc. as shown below:



3.1.10 Transaction Type

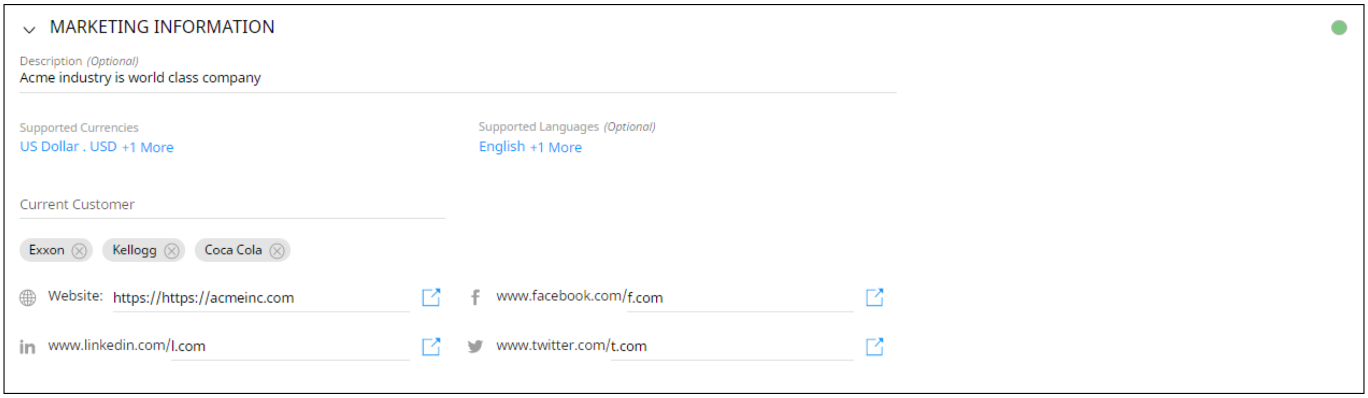
The Transaction Type section holds all the formats suppliers support for different transactions.



3.1.11 Marketing Information

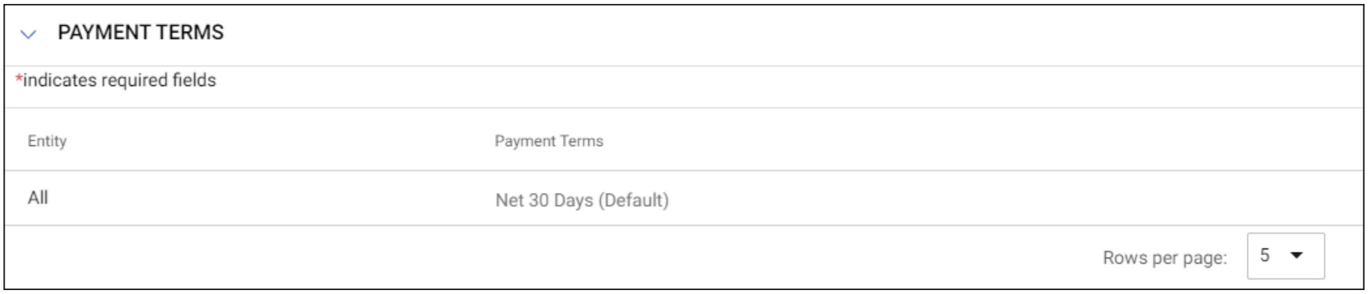
The Marketing section holds the marketing information like their existing customers, the currencies they support, and languages they support. It also captures the supplier's presence on social media.

The information on the Marketing tab is displayed as shown below:



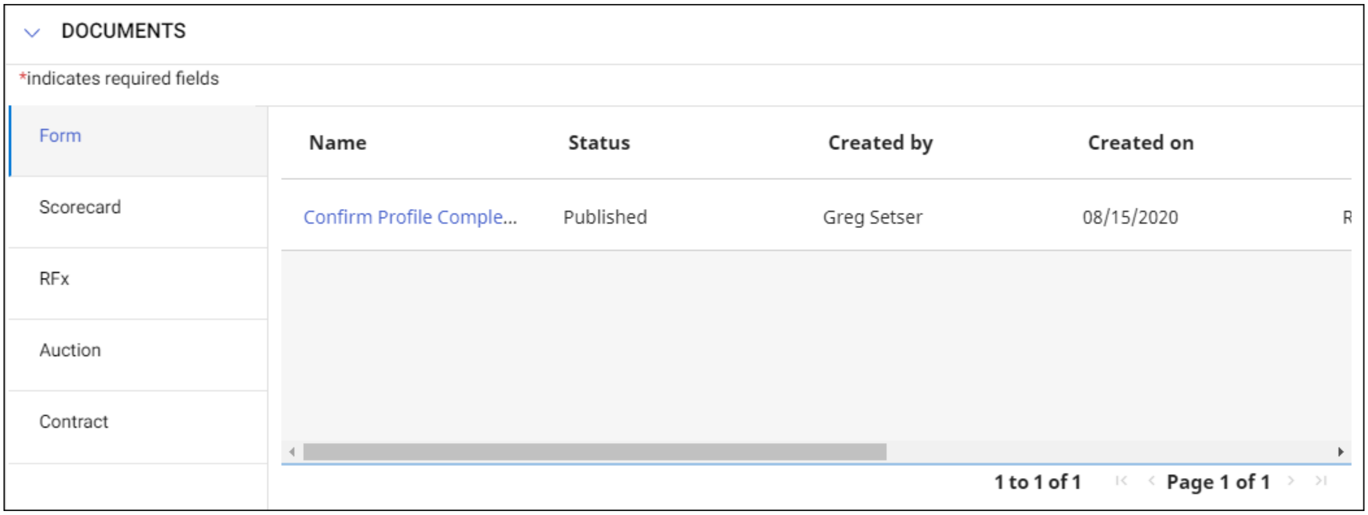
3.1.12 Payment Terms

The Payment Terms section displays the payment terms associated with the Organizational Entity.



3.1.13 Documents

The Documents section displays all the documents associated with you such as contracts, scorecards, requisitions, and invoices. This provides details of all transactions associated to you. Use the filter to view documents of a type.



3.2 Performing Other Actions

The Actions icon on the upper-right corner of the event page provides the following options:

- Change Request
- Discussion Forum

3.2.1 Change Request

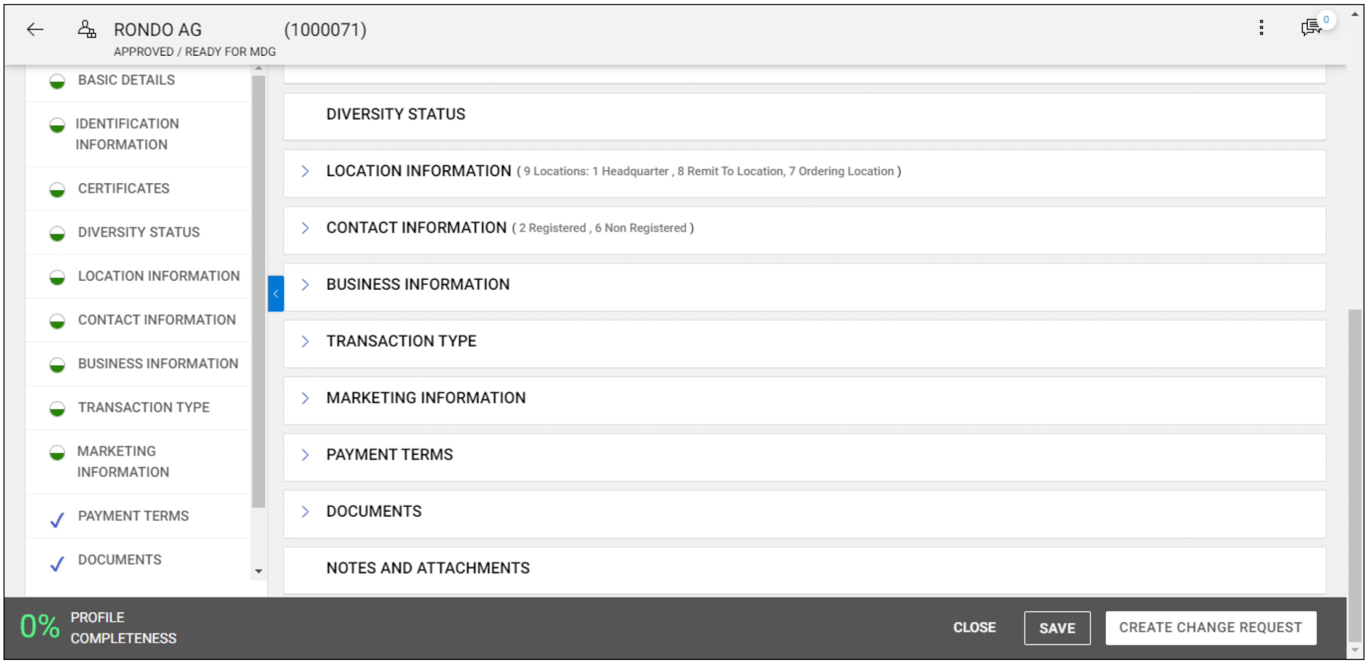
If the change request configuration for your product is enabled, then to make any changes to an approved supplier profile, you need to submit a Change Request. The changes that you request need to be approved for them to take effect. The approval flow can be configured, manually or based on rules when any attribute from an approved supplier profile is updated.

3.2.1.1 *Creating a Change Request*

Depending on the configuration of your product, to make any changes to a supplier profile, you may need to create a Change Request.

To create a Change Request:

1) From the Supplier Profile, click **Create Change Request.**



2) Make the required changes in the required sections and click **Submit for Approval**.

The supplier is notified through Email about the change request process.

Note

For information on how to view the status of your request and other options, see Viewing Change History.

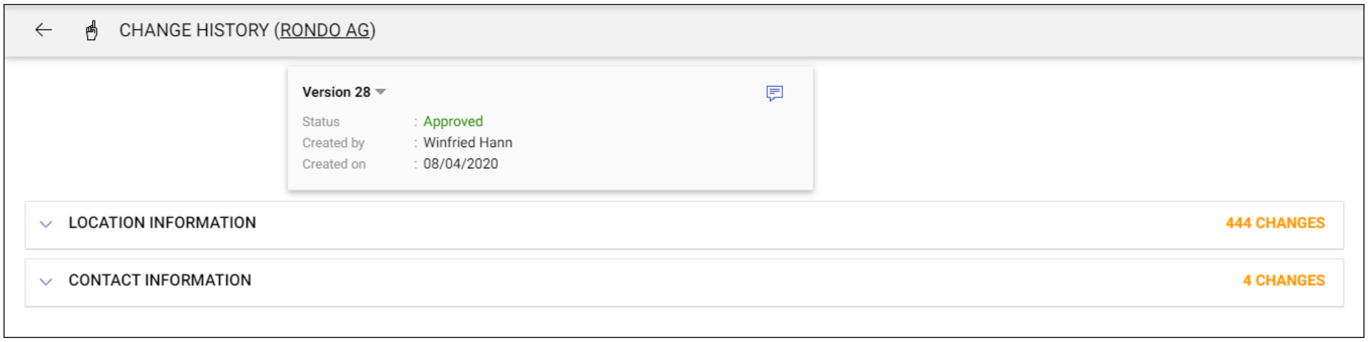
3.2.2 Viewing Change History

Suppliers Management keeps track of changes made to supplier information. This information is helpful for auditing purposes and is also available for reporting.

To view changes made to a supplier profile, from the Supplier Profile page, click the action menu icon and click **View Change History**.

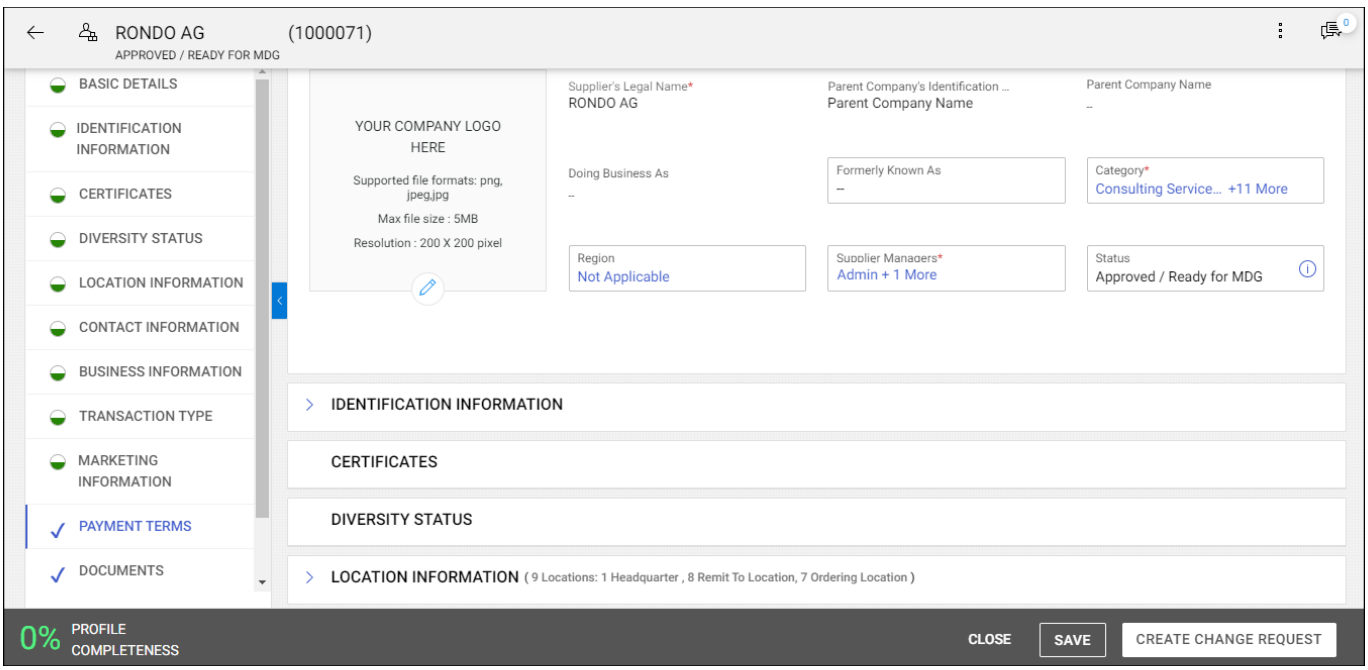
This page will show only those changes that are done through the change request process.

Note

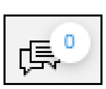


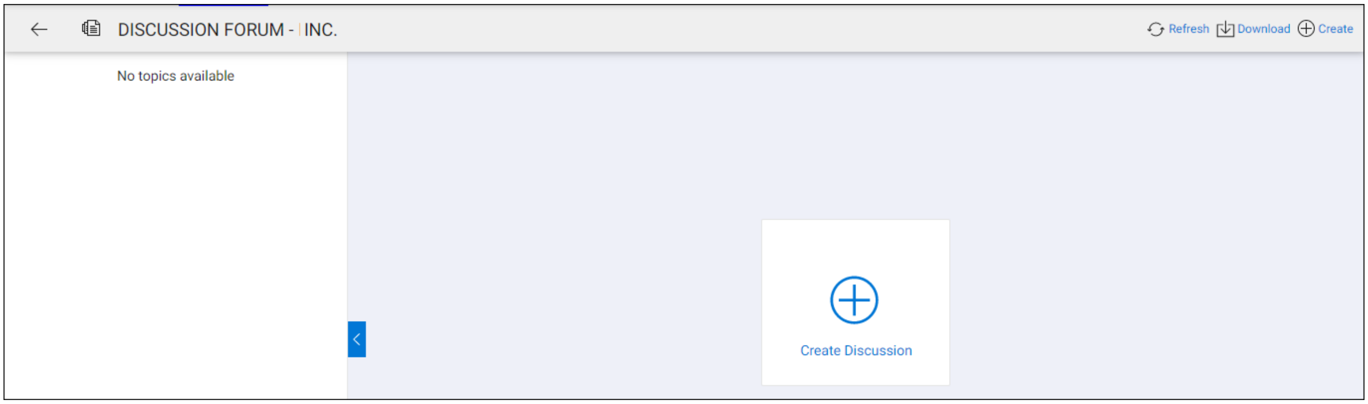
3.2.3 Discussion Forum

Using the forum, you can initiate a group discussion with team members. However, you can communicate with the buyer. A discussion forum consists of topics, which in turn contains the actual discussions where the stakeholders interact with each other as illustrated below.

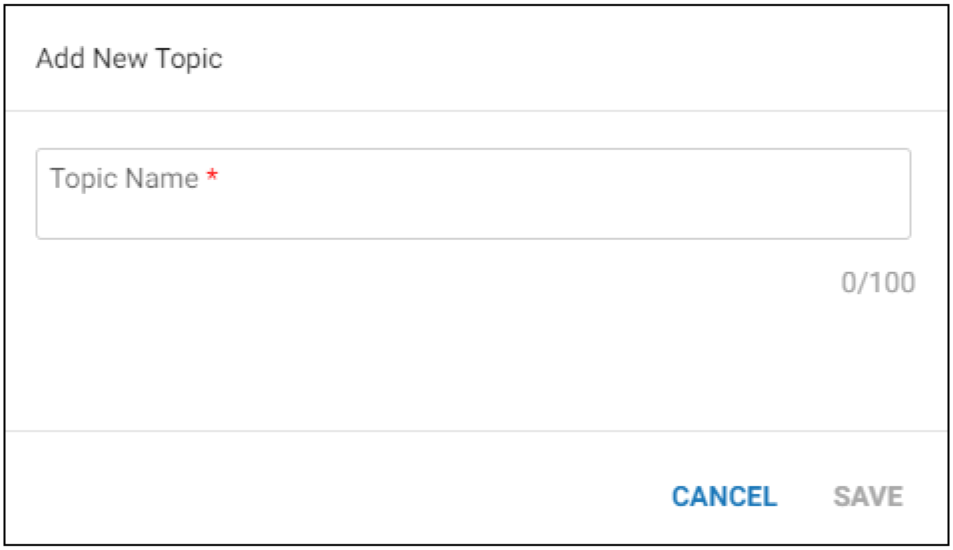


To initiate a discussion: in the RFx event:

1) Click the **Discussion Form**  icon. The following screen appears.

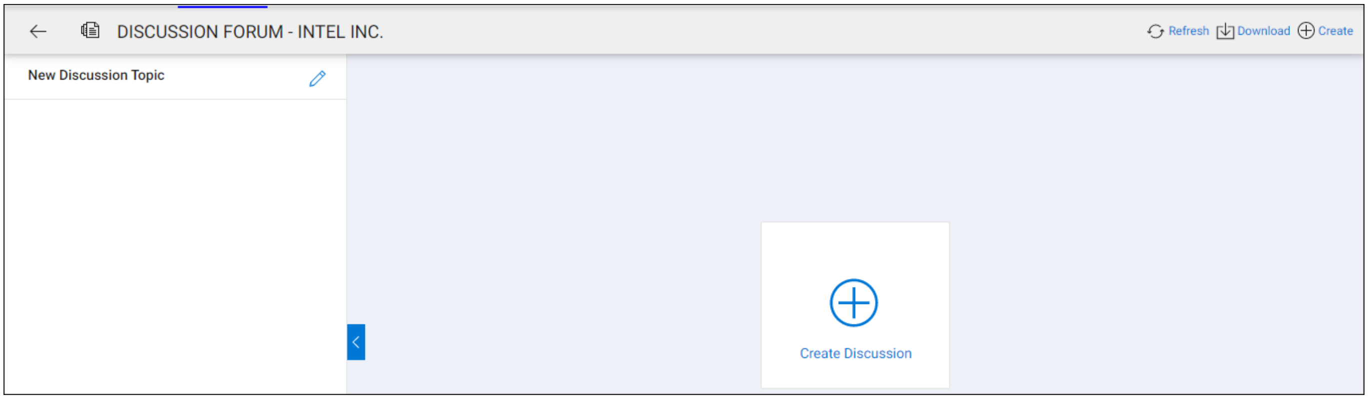


3) On the top-right corner, click **Create**, to create a topic/Discussion.

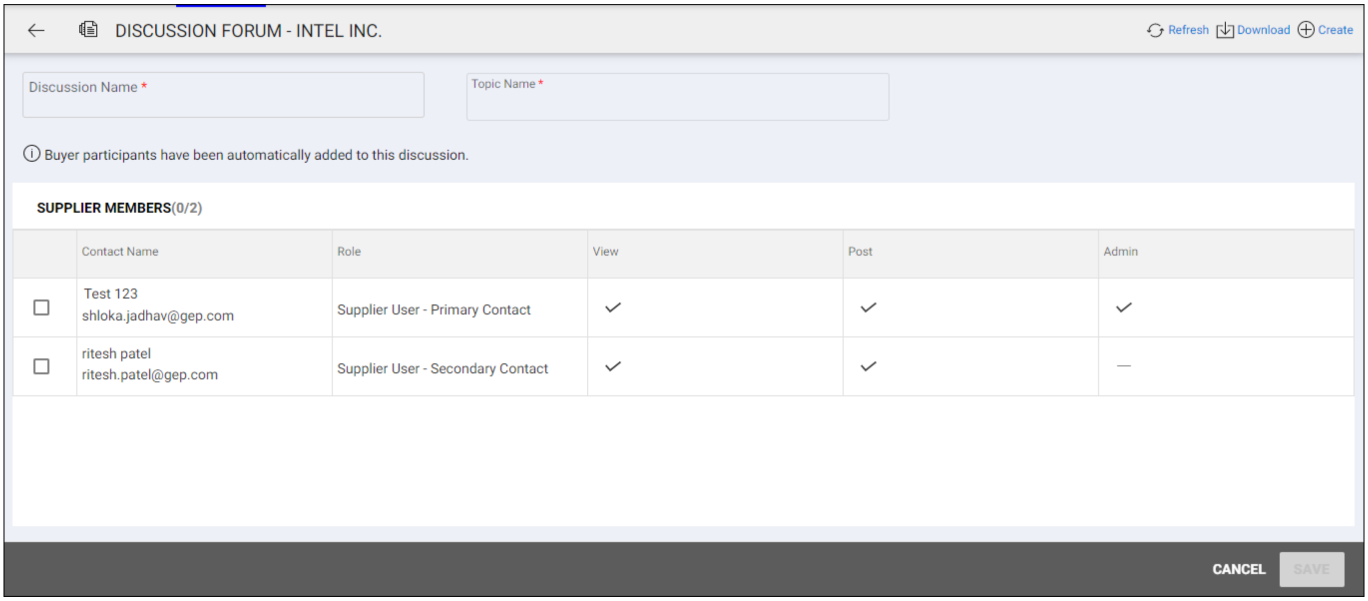


4) Enter the Topic Name and click **Save**.

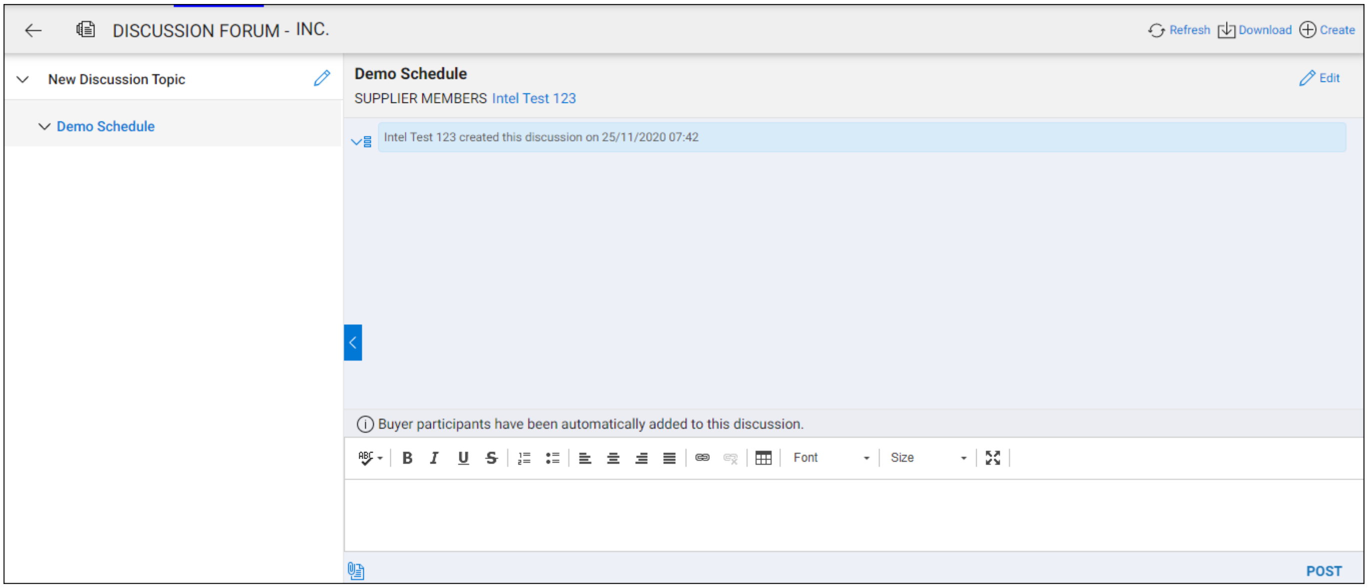
The newly created topic will appear in the left pane.



2) Similarly, to create a discussion, click the **Create** or **Create Discussion**.



3) Type the discussion name and select the topic to associate with the discussion.
4) Select the suppliers who can access the topic.
5) Click **Save.**



6) Click the **Add Attachment**  icon to attach documents, if any.
7) To post your messages or replies in the discussion, in the right pane of the page, click the discussion title.

When a buyer replies to your message, only you and your team members can view the reply. Others cannot view it. In an internal discussion, all the team members can view a posted message.

In a group discussion, you can also take the following actions.

Field	Description
Edit	Edit the name of the discussion.
Refresh	Refresh the page.
Download	Download the group discussion.