Supplier User Guide

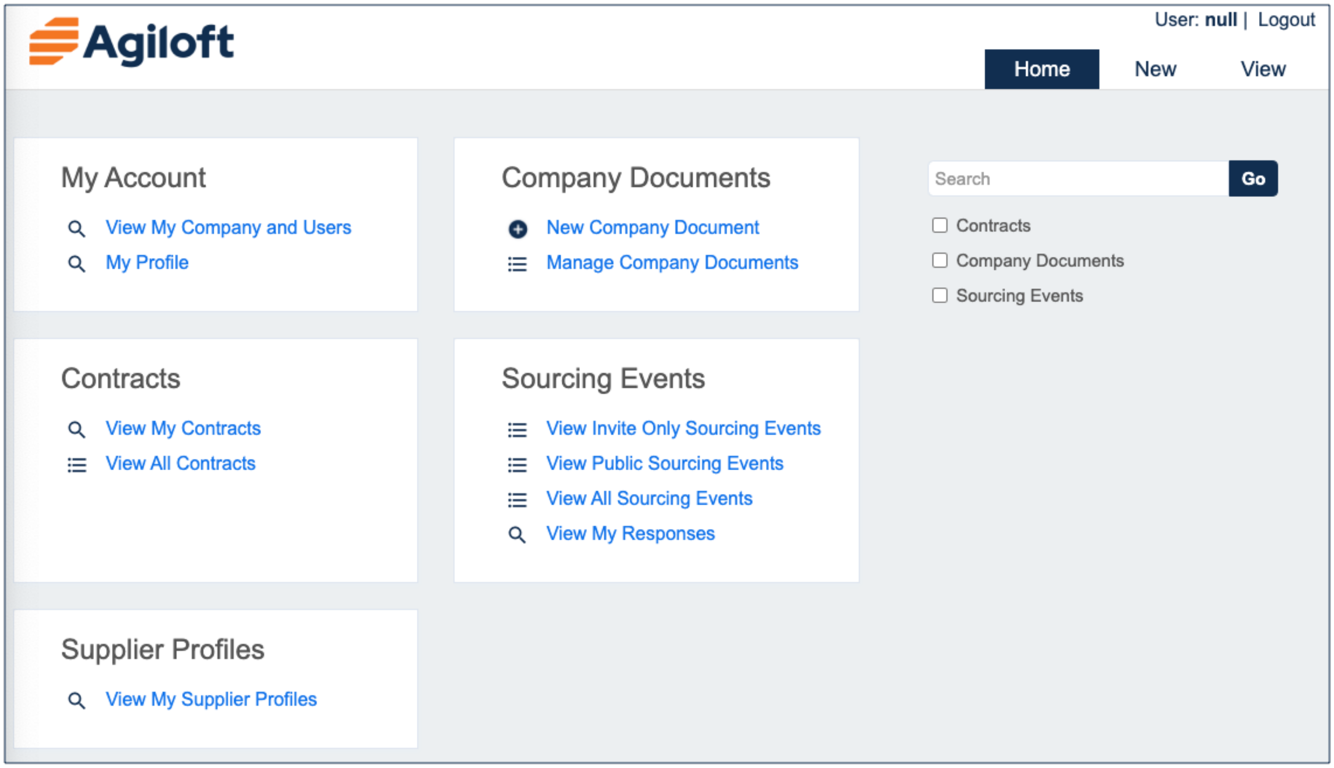
This article explains how to use the Supplier Portal End User Interface from an end user's perspective.

Use Case

The Supplier Portal is an out-of-the-box End User Interface that is highly customizable for different company needs. The Supplier Portal is accessed by inputting your login information for the Contract Management system that you likely received via email from sales@agiloft.com. This login is also used to upload documents.

The Supplier Portal allows end users to view and manage their own contact and company information. Additionally, the portal can be used to upload insurance certificates, performance bonds, performance reports, and your W-9. This guide provides you with some instructions on how to use the system:

When you login, you land on the Supplier Portal home page:



From here, click the relevant hyperlinks in order to upload or manage company documents, view your existing contracts, and view your company, personal profile, and other users.

- **My Account** section allows you to view and update company and user information, as well as create new users. You can also update your own user information in this section by clicking My Profile.
- **Company Documents** section allows you to create or manage Company Document records.
- **Contracts** section allows you to create or manage Contract records.
- **Sourcing Events** section allows you to view Sourcing Events, as well as responses to them.
- **Supplier Profiles** section allows you to view Supplier Profiles.
- **Search** allows you to search specifically for a Company Document or Contract without needing to click through multiple windows. You can also search for other field values using this search bar, such as Company Contacts or Company Names.
- The **Home** tab redirects you to the initial landing page that contains the four sections listed above: Company Documents, Contracts, My Account, and Search.
- The **New** tab allows you to create a new Company Document.
- The **View** tab allows you to view either your Contract records, the company's Contract records, or Company Document records. This is the same as clicking the similarly named hyperlinks to the right of the Search section.
- The **My Profile** tab redirects you to your own user record, just like clicking My Profile under My Account.

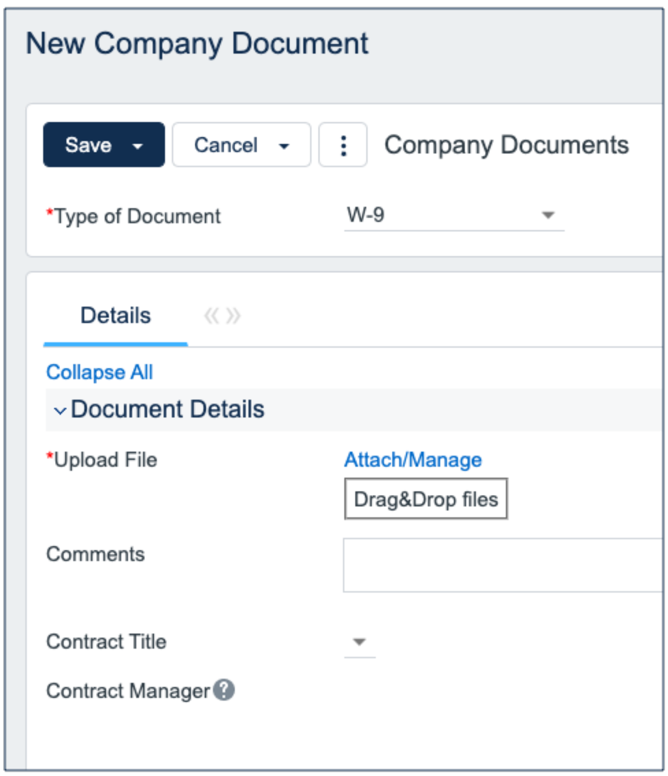
Company Documents

This section showcases the features that are included in the Company Documents section of the Supplier Portal.

Uploading a W-9 Form

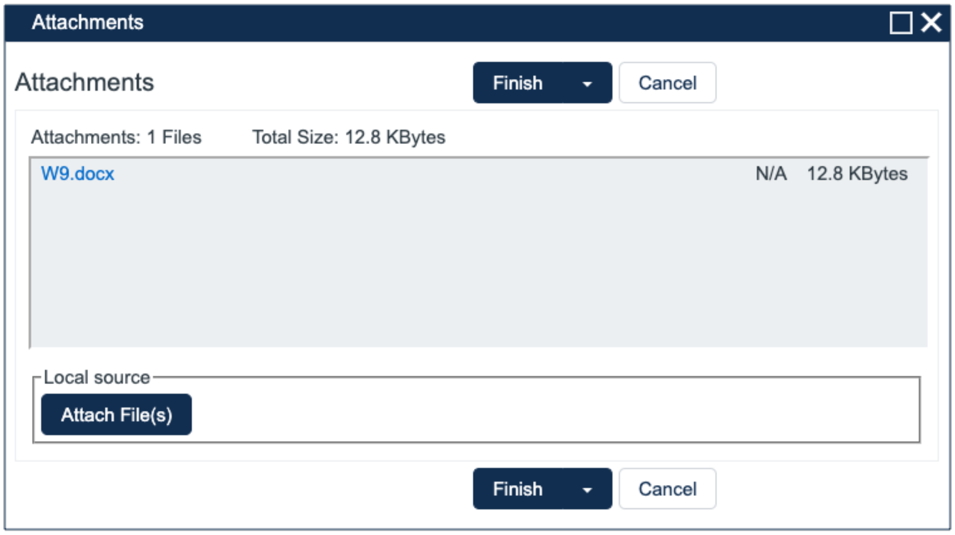
To upload a W-9 to the Supplier Portal, follow the steps provided below:

1. Click on the New Company Document link in the menu above.
2. From the Type of Document drop-down list, select W-9. Selecting W-9 in the Type of Document drop-down list causes the Contract Title and Contract Manager fields to appear. Contract Title contains a drop-down list that is pre-populated with all the existing Contract records for that specific Supplier company. The Contract Manager field automatically populates based on a linked field of the same name in the selected Contract record.



3. Click the Attach/Manage link and then the Attach File(s) button to open up a browse window.

4. Locate the W-9, double-click to attach it, and then click Finish. Alternatively, you can also drag and drop the file containing the W-9 into the box labeled 'Drag&Drop files' to the right of Upload File.



5. Save the record by clicking Save. The document appears below Attach/Manage in the Upload File field.

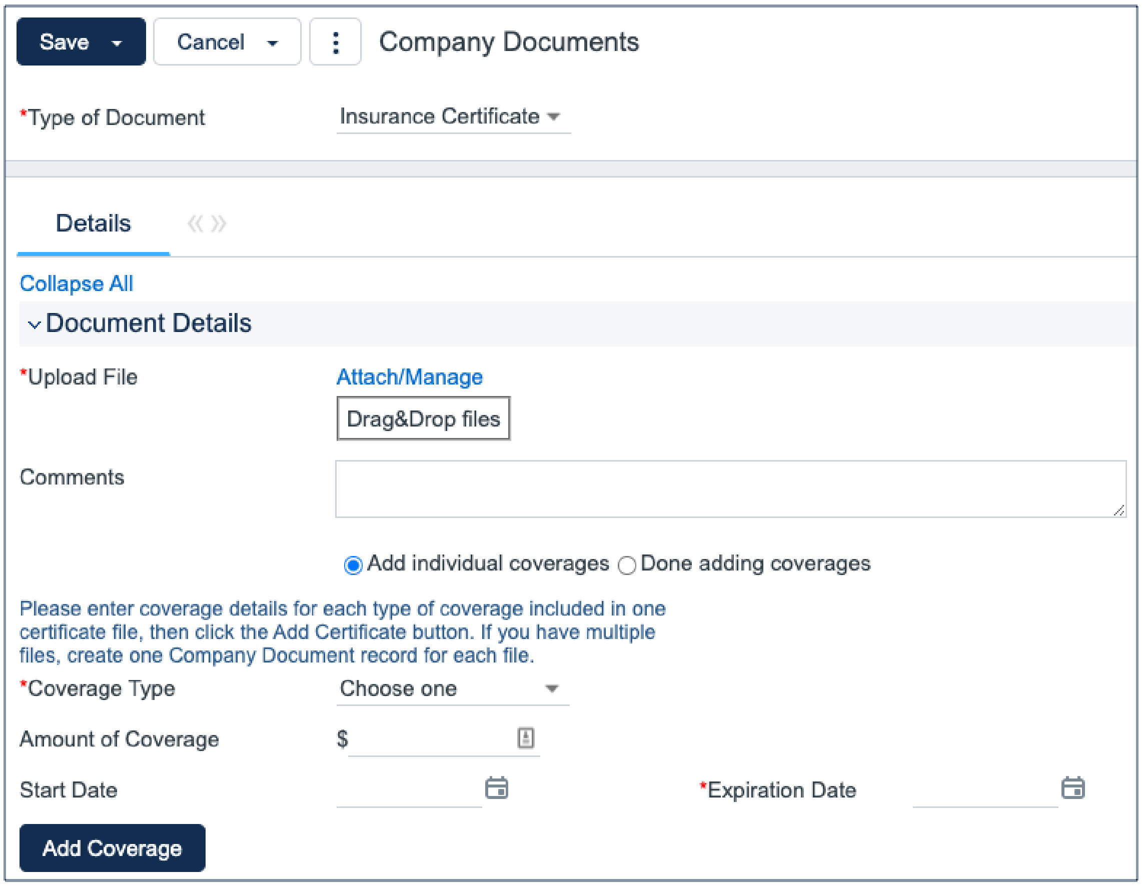
Uploading Insurance Certificates

The Supplier Portal can also be used to upload insurance certificates and to identify their expiration date, coverage types, and so on. You can also upload new insurance certificates when the old ones expire.

To upload an Insurance Certificate to the Supplier Portal, follow the steps provided below:

1. Click on the New Company Document link in the menu above.

2. From the drop-down list, select Insurance Certificate. Selecting Insurance Certificate in the Type of Document drop-down list causes multiple new fields to appear, such as Coverage Type, Amount of Coverage, Start Date, and Expiration Date. Coverage Type contains a drop-down list that contains the same choice list from the Type of Coverage drop-down list in the Insurance Coverages Table. Every option in the drop-down list adds the Aggregate Amount field to the right of Amount of Coverage, except for Worker's Comp, which adds the Meets Statutory Limits radio button.



3. Click the Attach/Manage link and then the Attach File(s) button to open up a browse window.
4. Locate the Insurance Certificate, double-click to attach it, and then click Finish. Alternatively, you can also drag and drop the file containing the Insurance Certificate into the box labeled 'Drag&Drop files' to the right of Upload File:
5. Fill in the newly visible fields in the Document Details section using details from the Insurance Certificate, one at a time. Click the Add Coverage button to add Insurance Coverage records to the Uploaded Insurance Coverages table, which appears below Document Details. A section for Submitter Info also appears below Uploaded Insurance Coverages that shows the default Company Contact. Remember, you can include Insurance Coverages that have different expiration dates.
6. Once you have added all the Insurance Coverage records, click 'Done adding coverages' to hide the data entry fields.
7. Click Save to complete the Company Document record.

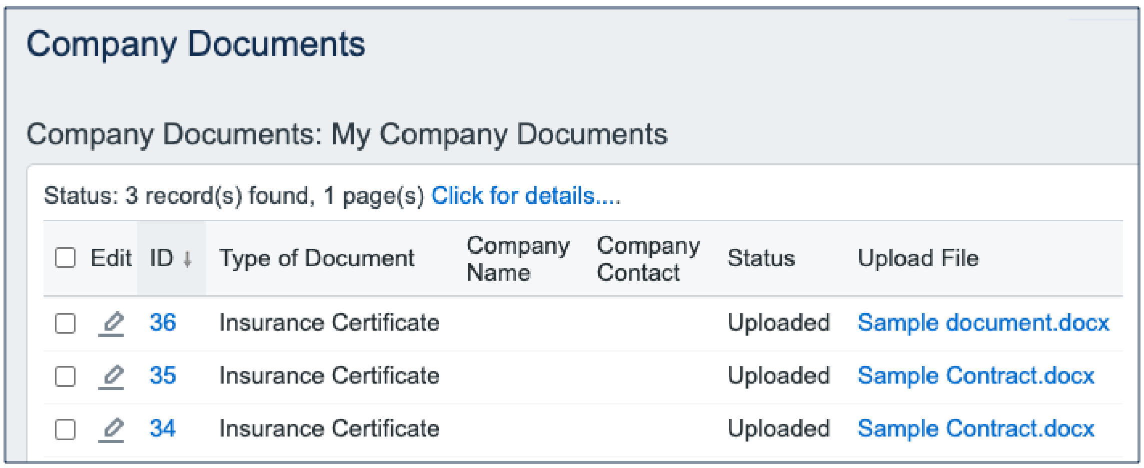
If you have multiple Attached Certificate documents to upload, you need to create a separate Company Document record for each of them by repeating steps 1-7.

Updating Expired Certificates

When Insurance Certificate records with a Status of Valid are nearing the the expiration date, you might receive an email reminding you to update the certificates. When you receive new certificates from your insurer, treat them like a new Company Document record and follow the same process as described above to upload the new file and add the coverage types.

Viewing Your Company Documents

Click Manage Company Documents to view a table of the files that have been uploaded. You can edit these records from this page directly, and can search through records using either a pre-configured saved search or text querying in the upper right-hand corner.


Company Documents

Company Documents: My Company Documents

Status: 3 record(s) found, 1 page(s) Click for details....

Edit	ID	Type of Document	Company Name	Company Contact	Status	Upload File
	36	Insurance Certificate			Uploaded	Sample document.docx
	35	Insurance Certificate			Uploaded	Sample Contract.docx
	34	Insurance Certificate			Uploaded	Sample Contract.docx

My Account

This section showcases the features that are included in the My Account section of the Supplier Portal.

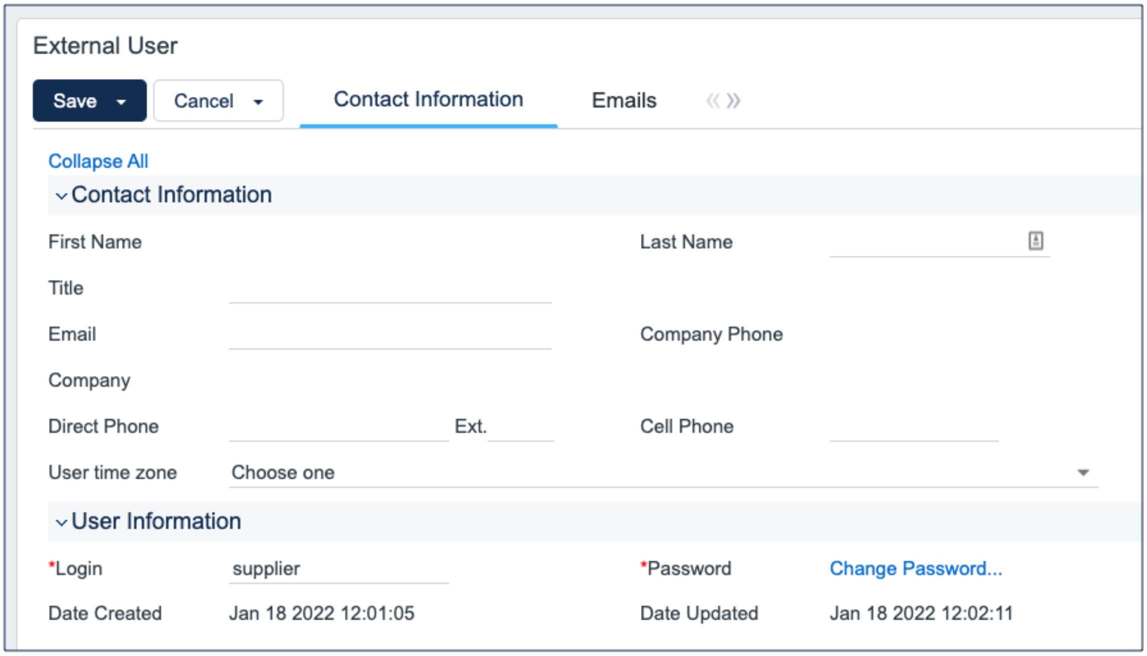
Updating Your Company Information and Adding Users

You can update company information or add new users by clicking View My Company and Users. From there, click **Edit** to:

- Update the fields for company Telephone, Fax, and Website URL in the Key Info tab.
- Update or add new Company Locations and Company Contacts in the Locations and Contacts tab.
- Update or add new Subsidiary or Affiliate Companies, related Contracts, and Company Documents in the Related Records tab.

Updating your User Profile

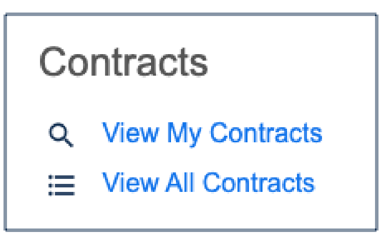
You can access information about your own password and contact information by clicking the My Profile link under My Account or the My Profile tab above the Search section. Either way, this brings up your user record:



You can change nearly everything included in your User record, such title, email, password, and phone information. However, you cannot change your first name. If your company has multiple locations, you can select your own location from the User time zone drop-down list.

Contracts

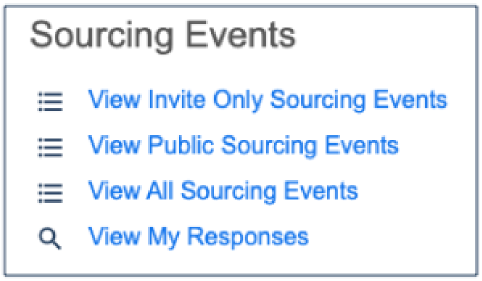
View contracts related to your company by using the links under the Contracts section of the home page.



There are two defined filters, one showing only contracts for which you are the main contact (View My Contracts) and another for all the contracts in your company that you have permission to view. Click one of these options to view a table of Contract records that have been uploaded. You can edit these records from this page directly, and can search through records using either a pre-configured saved search or text querying in the upper right-hand corner.

Sourcing Events

When the organization posts a Sourcing Event such as an RFP, RFI or RFQ, these records can be made available to some or all of the organization's suppliers. Using the credentials provided by the organization, a supplier can log in and see Invite Only events, Public Events, or All Sourcing Events, which shows both lists together.



Suppliers can find more information about a Sourcing Event record by clicking the magnifying glass icon in the View column, which shows information including the Scope, Additional Requirements, Status, and the relevant dates. Suppliers can communicate their interest by clicking the "I Am Interested" button.

After expressing interest by clicking the button, the Supplier Response is shown in the View My Responses link from the homepage.

From here, a Supplier can retract their interest or enter more information such as attached documents or costs. If the Bidding Type is Open, you can also see the Competitor Bids tab which will show other responses for the Sourcing Event.

You can also create questions about the Sourcing Event which will be sent back to the organization and see responses to existing questions. This allows you to have a communication channel with the event requested from inside the Supplier Portal.

Once you've filled in your response by entering the required price information and attaching relevant supporting documents, click Submit to return it to the organization to be reviewed. It's common for the organization to take a few days in order to review, score and award a recommendation for the sourcing event.

Once this process is completed by the organization for your Supplier Response, you'll receive a notification and the status changes to Award Recommended. The organization is then able to view the contract which can be found in the Supplier Portal.

Search

If you know exactly what you are looking for in, use the search block to search through your company documents or contracts to find a record of interest. Check the relevant box for the item(s) you wish to search, and then input your text query.