

Supplier Portal User Guide

v1.1

1. Supplier Portal Registration

Suppliers can register at Supplier Portal registration page.


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Supplier Registration

Select registration type (*) New Supplier New portal user for existing supplier

Existing Supplier ID

Company (*)

Registration type option „New Supplier“ will create a new user on the portal and also create a new Supplier record at Procuman software. New registrations will send email notifications to desired destinations. Registration type option „New portal user for existing supplier“ requires to enter an existing supplier portal ID.

The screenshot displays the Procuman Supplier Portal interface. The top navigation bar includes 'SUPPLIERS', 'PURCHASING', 'ACTIVITIES', 'MASTER DATA', and 'ALL'. A 'CREATE' dropdown menu and a search bar are also visible. The main content area shows the 'OVERVIEW' page for a supplier with Vendor ID VEN0009. The supplier's name is 'edeka' and the website is 'http://aldi.com'. The email address is 'e@e.com (Primary)'. The address is 'Berliner strasse 12, Bonn BX 12356, Germany'. The credit limit is 10,001.50 and the trade license expiry date is not specified. The portal ID is SPL20171209105222. The description field is empty. There is a 'COPY...' button next to the address field. The 'Prequalification Approved' checkbox is unchecked. The 'Prequalification Answer' section contains a table with attachments:

| Attachments | |
|--------------------------|-------------------------------------|
| Question | File |
| Prequalification Answers | Download Attachment |
| Upload audited accounts | Download Attachment |
| Certificates | Download Attachment |

Supplier can maintain their contact and bank information in the „Supplier Info“ page. Information updates are automatically saved to Procuman software.



Supplier Portal

Prequalification

Open Tenders

Catalogs

Invoices

Claims

Supplier Info

Supplier Information

| | |
|---------------------|--|
| Company | <input type="text" value="edeka"/> |
| Contact Person Name | <input type="text" value="Holger Baumann"/> |
| Business Email | <input type="text" value="e@e.com"/> |
| Phone Number | <input type="text" value="987654322"/> |
| Street Address | <input type="text" value="Berliner strasse 12"/> |

2. Prequalification Questionnaire

Suppliers can submit answers for the Prequalification Questionnaire at „Prequalification“ page. Submission will send email notifications to desired destinations. Answers will be saved as PDF files and the link to download the PDF is saved at Procuman Software Suppliers module.



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Supplier Prequalification Application

Apply to become supplier of goods and services by submitting complete answers to the questionnaire below.

Sections:

1. Company name, contact and address
2. Company financial details
3. Company references

| | |
|-----------------------------|----------------------|
| Company registered name (*) | <input type="text"/> |
| Contact person name (*) | <input type="text"/> |
| E-mail (*) | <input type="text"/> |
| Phone number (*) | <input type="text"/> |

3. Prequalification Scoring

A specific portal user with scoring rights is made available to enter the scoring for the prequalification answers. A menu item „Supplier Rating“ will list all the supplier submissions.



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Supplier Rating

Search

| Company registered name | Contact person name | Date Submitted | Submitter's Username | City | Country |
|-------------------------|---------------------|---------------------|----------------------|--------|---------|
| Edeka | Walter Walt | 2018-01-11 13:42:47 | e@e.com | Berlin | Germany |
| Edeka | Johan Helmut | 2018-01-04 12:11:49 | e@e.com | Berlin | Germany |

Selected entry details are displayed and score for each answer is entered by clicking the „Enter Score“ button.



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Supplier Rating

| | |
|-------------------------------|--|
| Contact person name | Walter Walt |
| Company registered name | Edeka |
| E-mail | w@w.com |
| Upload audited accounts | 5a5769d7b949a-Procuman_Supplier_Portal.pdf |
| Audited Accounts Score | 122 <input type="button" value="Enter Score"/> |
| Date Submitted | 2018-01-11 13:42:47 |
| Submitter's Username | e@e.com |
| Certificates | 5a5769d7bb260-Procuman_Supplier_Portal.pdf |
| Certificates Score | 8 <input type="button" value="Enter Score"/> |

Suppliers that qualify to be an approver vendor are to be marked as „Prequalification Approved“ in Procuman Suppliers module. Only after supplier has been approved in Procuman it can view the Open Tenders page.



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Waiting for supplier approval to display open tenders.

4. Open Tenders and Submitting Quotes

Menu item „Open Tenders“ lists all open tenders that have either been marked as „visible for all suppliers“ or Supplier has been added in RFX’s Supplier subpanel as invited supplier.

The screenshot shows the 'BASIC' tab of an RFX Request form. The form contains the following fields and values:

- RFX Title:** REQ0086
- RFX Type:** RFQ
- RFX Deadline:** 19-01-2018
- Request Sent Date:** (empty)
- Scouting:** (empty)
- Tender Description:** We need 5 new PCs
- Delivery Terms:** FOB Buyer Location
- Delivery Destination:** (empty)
- Assigned to:** (empty)
- Responsible Branch:** Procuman Luxembourg
- Required Delivery:** 30-11-2017
- Prepaid Freight:**
- Ship Carrier:** (empty)
- Project:** (empty)
- Visible for all suppliers:**
- Line Items:** (empty)

Supplier can view a list of all open e-tenders at „Open Tenders“ page.

The screenshot shows the 'Open Tenders' page in the Procuman Supplier Portal. The page displays a list of RFX requests with the following columns: RFX ID, Type, RFX Deadline, Required Delivery Date, and Description. Each RFX request is expanded to show a table of line items with columns: Line Number, Catalog Item, Product Name, Qty, Description, and eTender Link.

| RFX ID | Type | RFX Deadline | Required Delivery Date | Description | | | | | | | | | | | | | | | | | | |
|--|---------------|----------------------|------------------------|-------------------|--------------|--------------|--------------|-----|-------------|--------------|---|---------------|----------------------|------|--|-----------|---|--|----------------------|-------|-----------------|-----------|
| RFX000038 | RFQ | 2018-11-04 | 2018-10-31 | Chipboard panels | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Line Number</th> <th>Catalog Item</th> <th>Product Name</th> <th>Qty</th> <th>Description</th> <th>eTender Link</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Installation service</td> <td>1.00</td> <td></td> <td>Enter Bid</td> </tr> <tr> <td>2</td> <td></td> <td>Chipboard</td> <td>20.00</td> <td></td> <td>Enter Bid</td> </tr> </tbody> </table> | | | | | Line Number | Catalog Item | Product Name | Qty | Description | eTender Link | 1 | | Installation service | 1.00 | | Enter Bid | 2 | | Chipboard | 20.00 | | Enter Bid |
| Line Number | Catalog Item | Product Name | Qty | Description | eTender Link | | | | | | | | | | | | | | | | | |
| 1 | | Installation service | 1.00 | | Enter Bid | | | | | | | | | | | | | | | | | |
| 2 | | Chipboard | 20.00 | | Enter Bid | | | | | | | | | | | | | | | | | |
| RFX000039 | RFQ | 2018-11-26 | 2018-10-31 | New Laptop | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Line Number</th> <th>Catalog Item</th> <th>Product Name</th> <th>Qty</th> <th>Description</th> <th>eTender Link</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Thinkpad X230</td> <td>Thinkpad X230</td> <td>1.00</td> <td></td> <td>Enter Bid</td> </tr> <tr> <td>2</td> <td></td> <td>Installation service</td> <td>1.00</td> <td>PC installation</td> <td>Enter Bid</td> </tr> </tbody> </table> | | | | | Line Number | Catalog Item | Product Name | Qty | Description | eTender Link | 1 | Thinkpad X230 | Thinkpad X230 | 1.00 | | Enter Bid | 2 | | Installation service | 1.00 | PC installation | Enter Bid |
| Line Number | Catalog Item | Product Name | Qty | Description | eTender Link | | | | | | | | | | | | | | | | | |
| 1 | Thinkpad X230 | Thinkpad X230 | 1.00 | | Enter Bid | | | | | | | | | | | | | | | | | |
| 2 | | Installation service | 1.00 | PC installation | Enter Bid | | | | | | | | | | | | | | | | | |
| RFX000019 | RFQ | 2019-09-30 | 2017-11-30 | We need 5 new PCs | | | | | | | | | | | | | | | | | | |

The „Enter Bid“ link will open a new page where supplier can enter their quote for the requested line item product or service. All submitted quotes are saved at Procuman RFX Answer module’s subpanel.

RFX ID: RFX000039 RFX Type: RFQ
 Line Item NO: 1 Product Name: Thinkpad X230 Thinkpad X230
 Quantity: 1.00 Description:

Name File: Category Status Publish Date
No Tender Files

RFQ Bidding Form

| | | | |
|-----------------------|---------------------------------------|--------------------|---|
| Quote Description (*) | <input type="text"/> | Supplier Reference | <input type="text"/> |
| Product Name | <input type="text"/> | Expiration Date | <input type="text"/> |
| Product Description | <input type="text"/> | Product Code | <input type="text"/> |
| Offered Quantity | <input type="text"/> | Product URL | <input type="text"/> |
| Total Cost | <input type="text"/> | Unit Price | <input type="text"/> |
| Submit | <input type="submit" value="Submit"/> | Min Order Qty | <input type="text"/> |
| | | Offer Documents | <input type="button" value="Choose File"/> No file chosen |

5. Supplier Catalogs

Suppliers can submit their product catalogs in „Catalogs“ menu.



Product Catalog Upload

Catalog Name

Catalog Version No.

Select Product Catalog (*) No file chosen

Upload overwrites existing catalog !

Latest uploaded catalog is available at Procuman Suppliers-module in „Portal Catalog“ section.

6. Supplier Invoices

Supplier can submit their PDF invoices in the „Invoices“ menu.

Submitted invoices will automatically create a new „Invoices received“ record in Procuman. Submitted PDF invoice can be downloaded in invoice’s detail view.

PRTL20180116015119 ☆


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[DUPLICATE](#)
[DELETE](#)
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BASIC

| | | | |
|---------------------------|---|---------------------------|------------|
| Purchase Order: | | PO number: | 91 |
| Invoice ID: | PRTL20180116015119 | Invoice Received Date: | 16-01-2018 |
| Currency: | UAE Dirham | Invoice Due Date: | 30-01-2018 |
| Invoice Value Before Tax: | | Total Tax: | |
| Total Discounts: | | Total Shipping Cost: | |
| Invoice Status: | | Total Invoiced Amount: | 678.90 |
| Supplier Invoice No.: | 23 | Terms: | |
| GL Account: | | Invoice Paid Date: | |
| Cost Center: | | Assigned Approver: | |
| Description: | | Supplier Sales Order No.: | SO789 |
| Portal Invoice: | Download Portal Invoice | | |

7. Supplier questions and answers

Supplier can ask clarification questions for RFQs in the „Create Question“-page.

 **PROCUMAN**

Supplier Portal Prequalification Open Tenders **Questions** Catalogs Orders Invoices Supplier Info

New Question

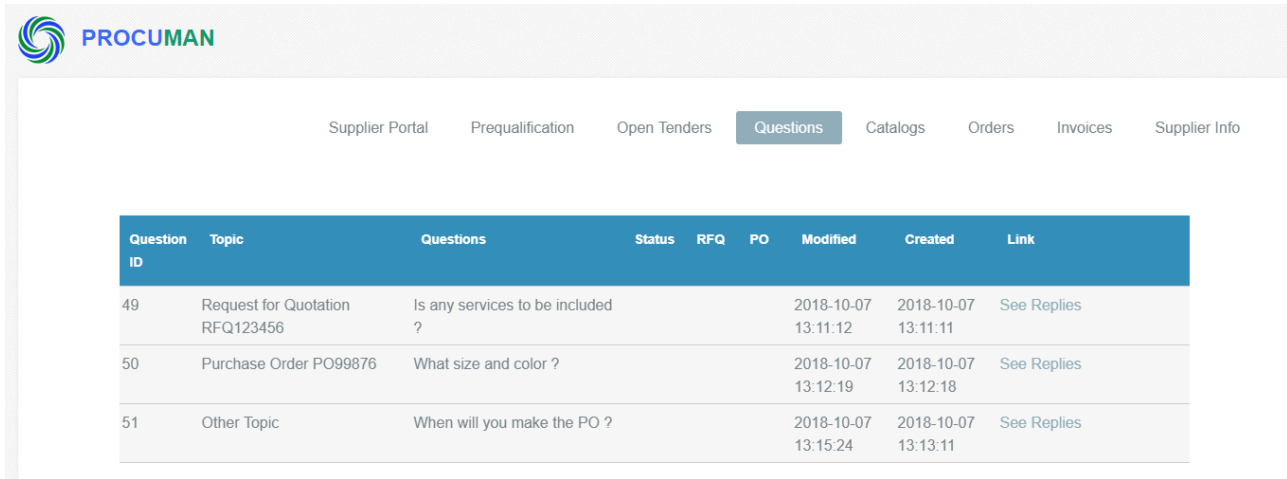
Question Topic (*)

RFQ or PO Number

Question (*)

[Create](#)

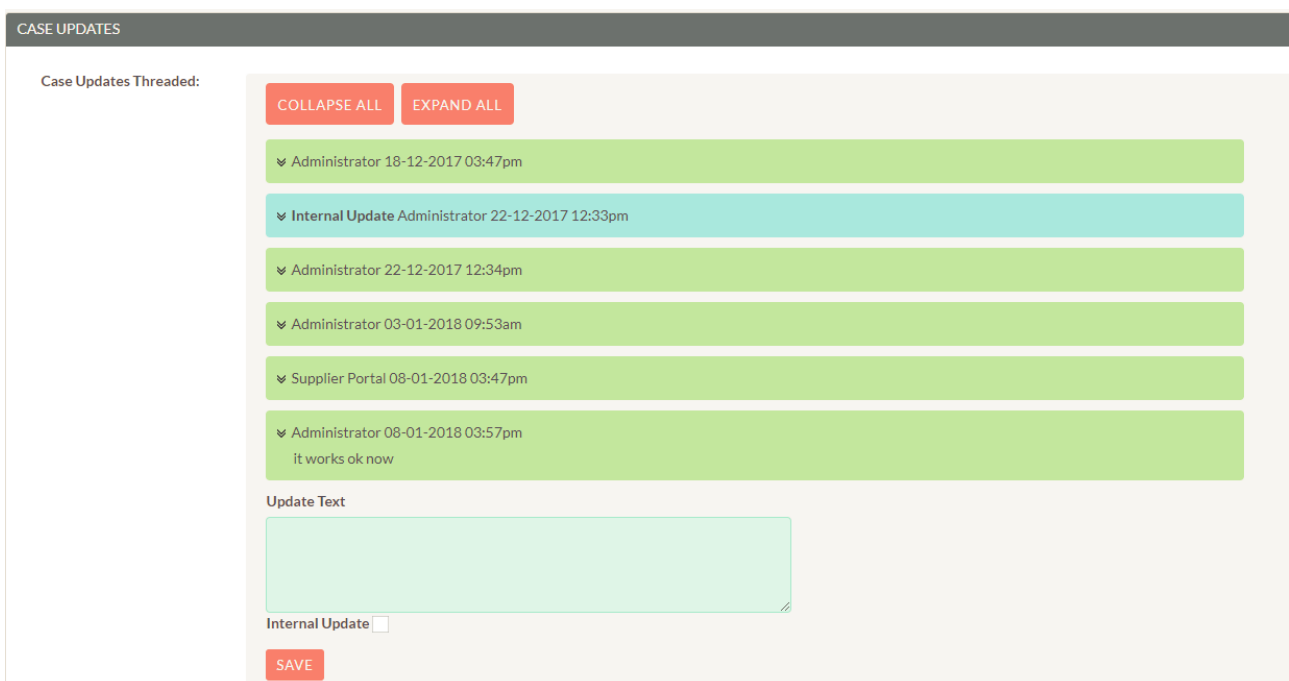
Open Question are listed in Questions-page.



The screenshot shows the Procuman interface with the 'Questions' tab selected. Below the navigation menu is a table listing questions with columns for Question ID, Topic, Questions, Status, RFQ, PO, Modified, Created, and Link.

| Question ID | Topic | Questions | Status | RFQ | PO | Modified | Created | Link |
|-------------|---------------------------------|----------------------------------|--------|-----|----|---------------------|---------------------|-------------|
| 49 | Request for Quotation RFQ123456 | Is any services to be included ? | | | | 2018-10-07 13:11:12 | 2018-10-07 13:11:11 | See Replies |
| 50 | Purchase Order PO99876 | What size and color ? | | | | 2018-10-07 13:12:19 | 2018-10-07 13:12:18 | See Replies |
| 51 | Other Topic | When will you make the PO ? | | | | 2018-10-07 13:15:24 | 2018-10-07 13:13:11 | See Replies |

Supplier questions are saved in Procuman „Supplier Questions“-module.



The screenshot shows the 'CASE UPDATES' module. It features a 'Case Updates Threaded:' section with two buttons: 'COLLAPSE ALL' and 'EXPAND ALL'. Below these are several update entries, each with a dropdown arrow and a timestamp. The last entry is expanded, showing the text 'it works ok now'. Below the list is a form to add a new update, including a text area for 'Update Text', an 'Internal Update' checkbox, and a 'SAVE' button.

8. Purchase Orders

Purchase order sent for the supplier are listed in Ordeps-page.

| PO Number | PO Ref. | Date Required | Delivery to Branch | Notes for Supplier | Required Documents | RFQ Offer | Total Incl Tax | Currency | |
|-----------|------------------|----------------------|---------------------|--------------------|-------------------------------------|-----------------|-------------------|--------------|--------------------|
| 102 | PO-REQ0108 | | Procuman Luxembourg | New forklift truck | | | 127,056.00 | AED | |
| | Line | Product | Description | Part Number | Note | Quantity | Sale Price | Total | Update Link |
| | 1 | Forklift truck | | | | 1 | 34,000.00 | 34,000.00 | Update Status |
| | 2 | extra battery pack - | | | | 2 | 45,678.00 | 91,356.00 | Update Status |
| PO Number | PO Ref. | Date Required | Delivery to Branch | Notes for Supplier | Required Documents | RFQ Offer | Total Incl Tax | Currency | |
| 112 | PO112 Milk Order | 2018-10-25 | | | Packing_List Quality_Certificate | RFXA000062 | 322.15 | AED | |

Supplier can update the PO status by entering to the „Update Status“ link.

Supplier Portal Prequalification Open Tenders Questions Catalogs Orders Invoices Supplier Info

Description: normal milk
 Service Name: Coffee Milk
 Part Number: 123
 Note: must be cold
 Qty: 2
 Sale Price: 11.00
 Total: 22.00

Old Values
 Status: Shipped
 Delivery Date: 2018-10-23
 Remarks: milk is shipped

PO Line Update

Status:

Delivery Date: ...

Remarks:

Submit:

Supplier's PO status updates are visible in Procuman PO detail view page.