SUPPLIER

SUPPLIERS ON-BOARDING USER MANUAL

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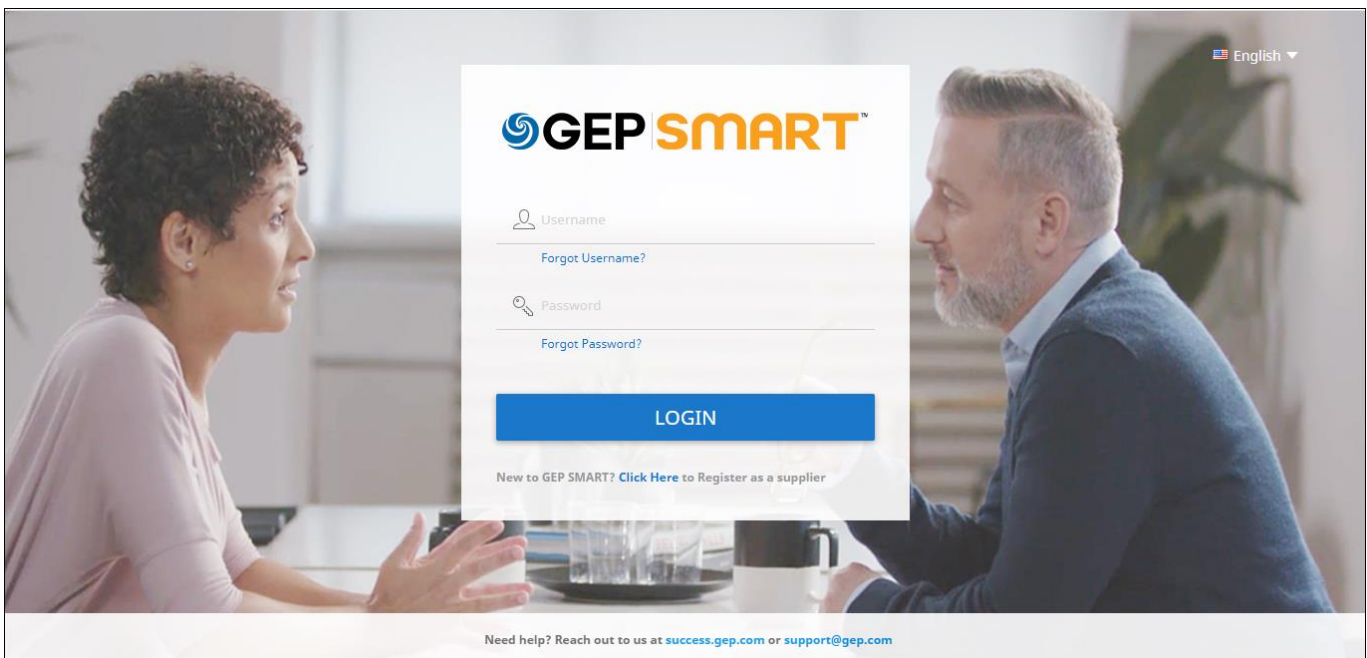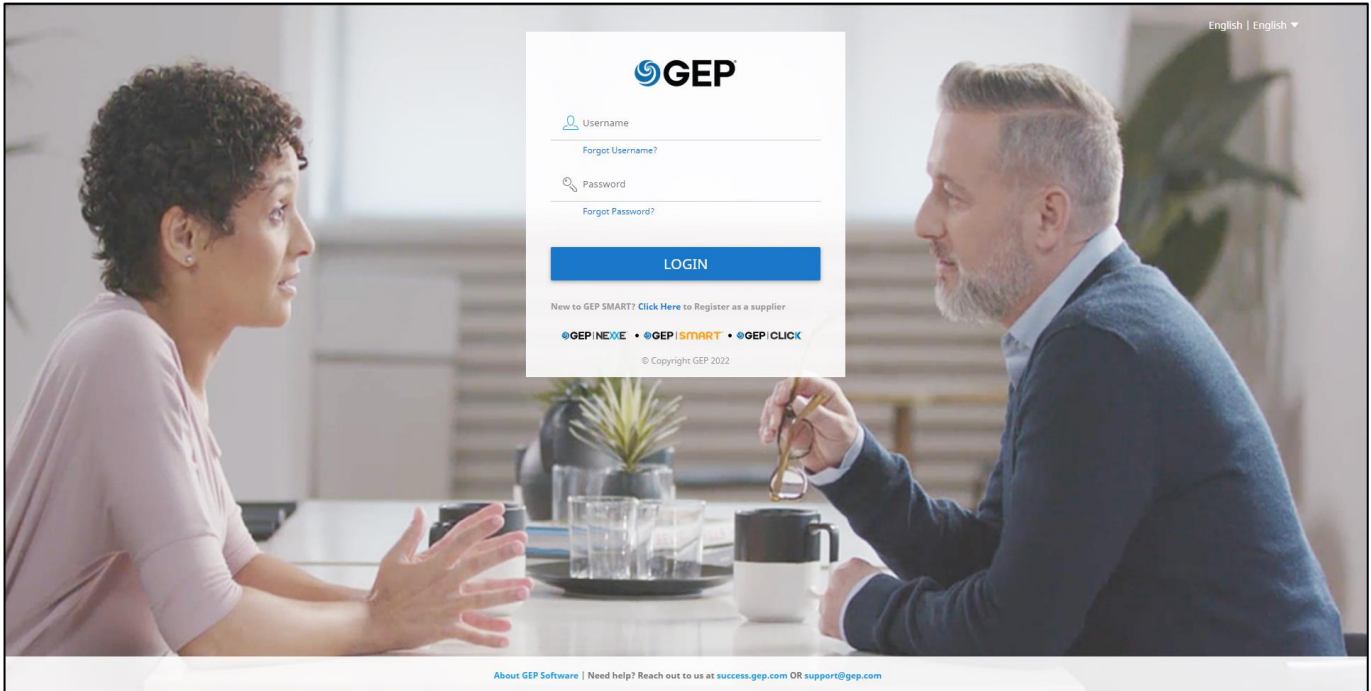
Chapter 1:   Getting Started

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 menu icon and then click Logout icon.

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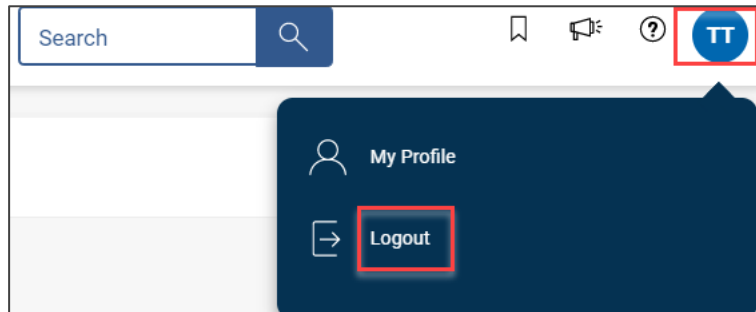
Chapter 2: Supplier Registration

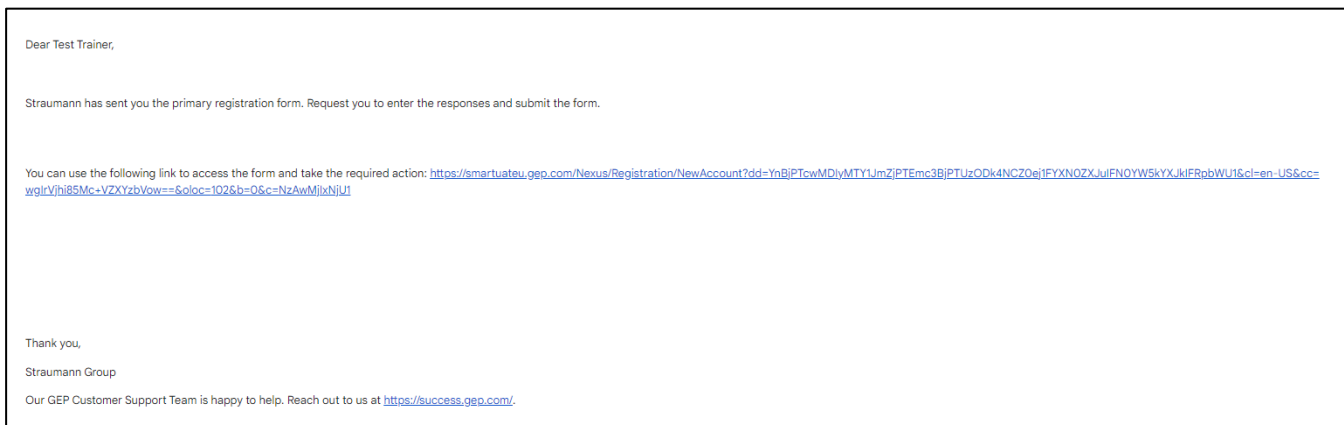The Registration Information tab has relevant registration fields that are available upfront to you; you do not have to go into the registration form to view responses. However, you can update the information anytime.

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 after the buyer has invited you to fill the Primary Registration Form. In that case, you will receive an email with the registration link:

Dear Test Trainer,

Straumann has sent you the primary registration form. Request you to enter the responses and submit the form.

You can use the following link to access the form and take the required action: https://smartuateu.gep.com/Nexus/Registration/NewAccount?dd=YnBjPTcwMDIyMTY1JmZjPTEmc3BjPTUzODk4NCZOej1FYXN0ZXJubFN0YW5kYXJkIFRpbWU1&cl=en-US&cc=wgIrVjhi85Mc+VZXYzbVow==&oloc=1O2&b=0&c=NzAwMjIxNjU1

Thank you,

Straumann Group

Our GEP Customer Support Team is happy to help. Reach out to us at https://success.gep.com/.

To complete the registration:

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

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

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.

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`UAT`

Primary Registration Form

Basic Details

All fields marked with * are required.

Account Credentials

Username *	_____ ⓘ
User Email *	_____
Password*	_____ ⓘ
Confirm Password*	_____ ⓘ
Mobile Number	▼ _____

Company Information

Legal Company Name	_____ ⓘ
Doing Business As	_____ ⓘ
Company Website	_____ ⓘ
Headquarter	▼ ⓘ
Address Line 1	Suite, Street, Locality ⓘ
Address Line 2	Suite, Street, Locality ⓘ

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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:

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UAT

1 more step

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. 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

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Australia:+61 285 181 914
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Brazil:+55 113 181 5451

Email: Support@gep.com

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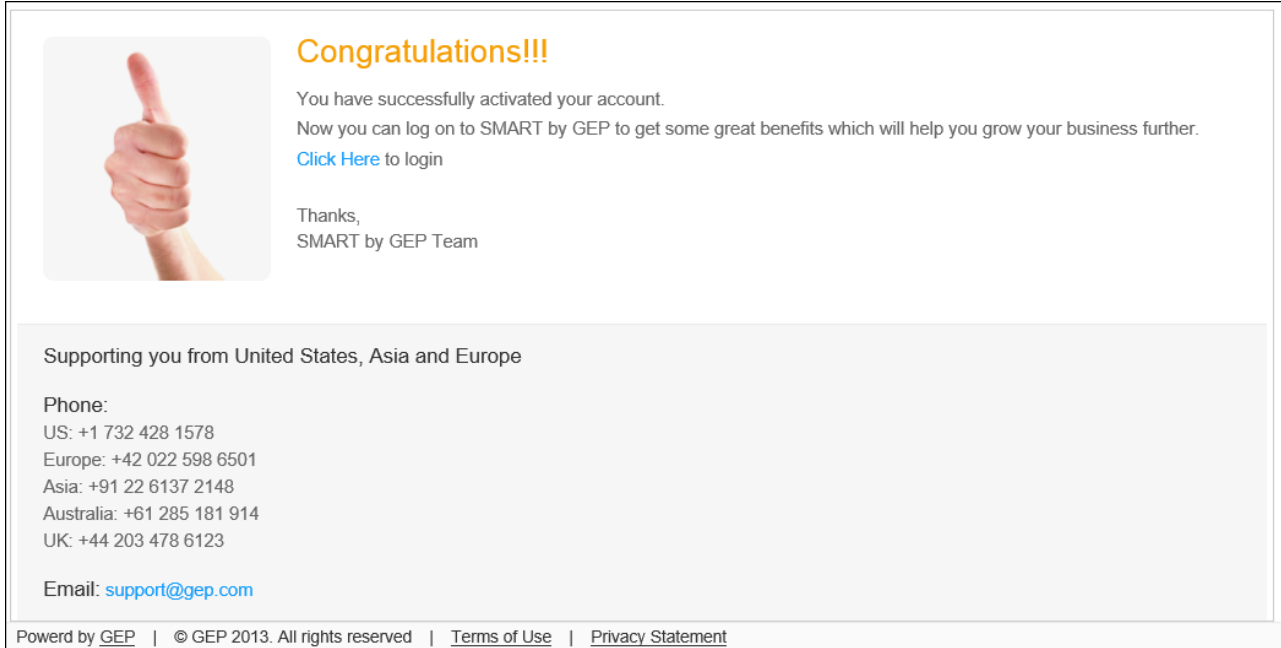

5) Click **Click Here** to login to GEP SMART system and complete your profile.

You can login to the tool with the Username and Password created in the Primary Registration Form.

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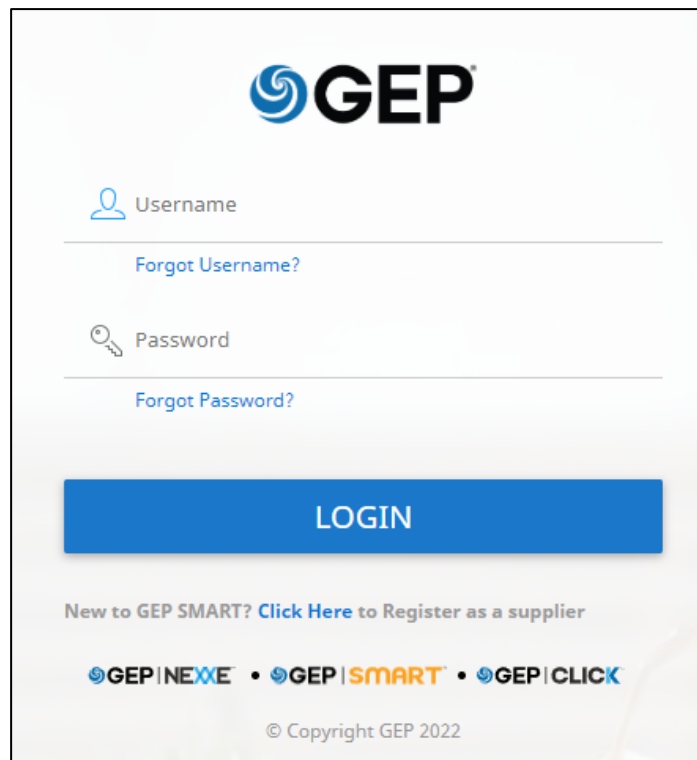
Chapter 3:   Profile Completion

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] icon and then click Supplier Profile, to update the details.
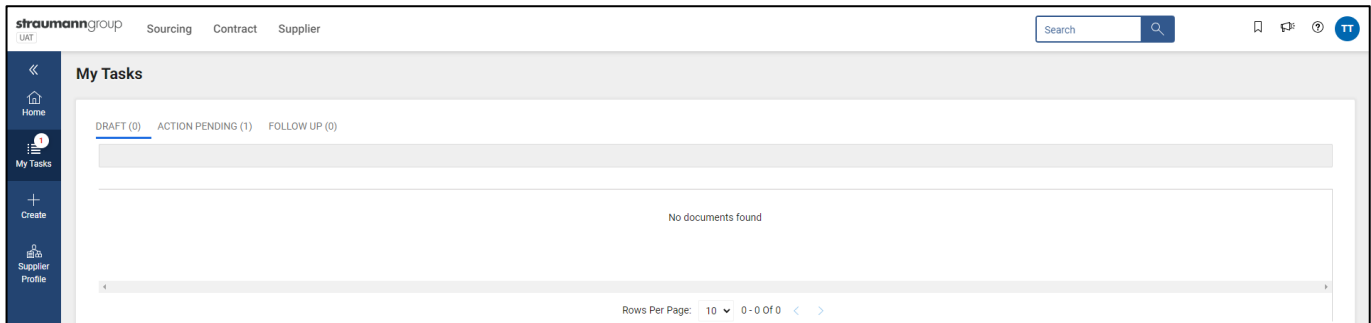
You can add or update the details on this page. This page contains the following tabs.

- Basic Details
- Identification Information
- Certificates
- Diversity Status
- Registration Information
- Location Information
- Contact Information
- Business Information
- Marketing Information
- Payment Terms
- Documents
- Notes and attachments

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 tax 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 Certificates

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:
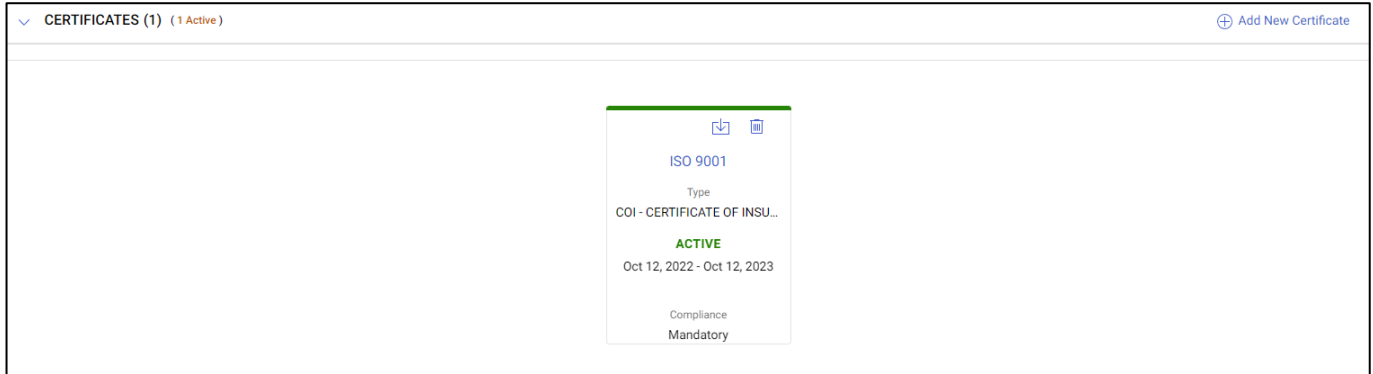
To update an existing certificate, click the certificate name, the Edit Certificate pop-up appears.
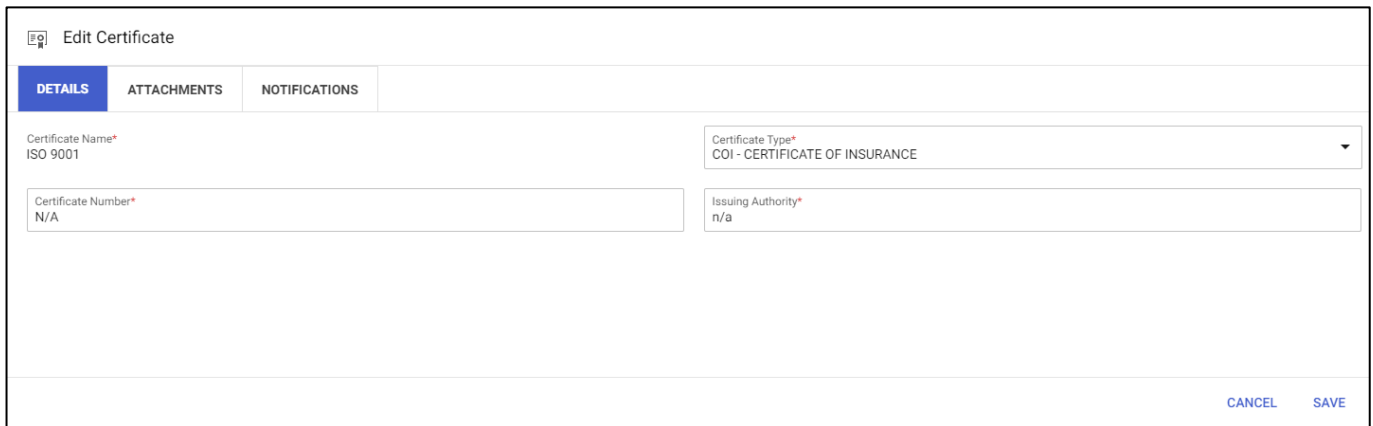
For information on how to edit the certificate refer Adding a Certificate

3.1.3.1 Adding a Certificate

To add a certificate:

1) In the Certificate section, click the Add New Certificate ⊕ Add New Certificate icon and select the required certificate from the list of standard certificates provided and then click **Done**.
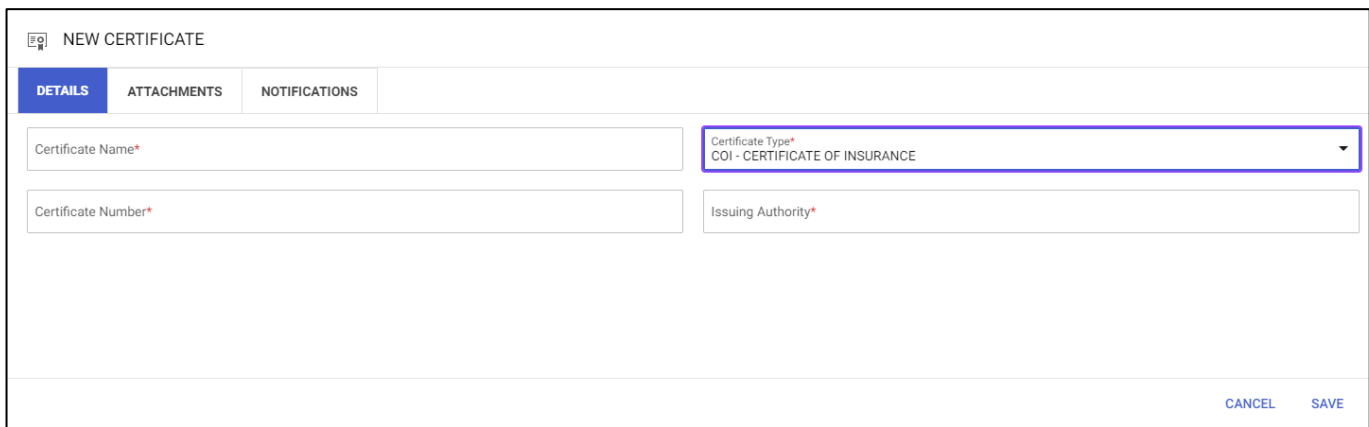
2) In case you want to add a new certificate other than the standard ones, click **Add New.**

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

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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**.

🖊️ **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.*

3.1.4   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 text boxes. You can then update the information.

3.1.5   Registration Information

The Registration Information section holds your response to the primary registration form.

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

3.1.6   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

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- 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

3.1.6.1 Adding a Location

To add a location:

a) On the Location Information section, click the Add New Location ⊕ Add New Location icon.

b) Based on the Country field selected, the data in this section is populated.

c) Select the location type you want to add information. For example, select any location type.

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

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	▪	*Based on configuration of your product, you may have more options available at the location level such as Identification Details.*
Note	▪	*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.

3.1.7   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] icon.

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

- ▪ To Edit a contact, refer <u>Adding Contacts</u>.

3.1.7.1   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] icon next to the required contact to identify the primary contact.*

3.1.8   Business Information

The Business Information section captures various business details including business locations, revenue, profit, etc. as shown below:0

3.1.9   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:

3.1.10   Payment Terms

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

3.1.11   Documents

The Documents section displays all the documents associated with you such as forms, scorecards, RFx's, auctions, contracts. 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 option:

- [View Change History](#)
- [Discussion Forum](#)

3.2.1   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**.

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

3.2.2   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] icon. The following screen appears.

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

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

The newly created topic will appear in the left pane.
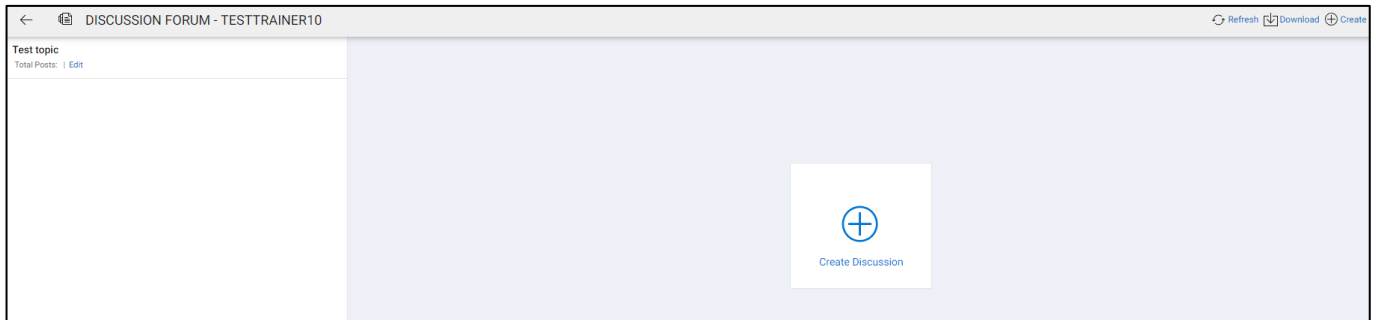
4) Similarly, to create a discussion, click the **Create** or **Create Discussion**.
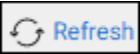
5) Type the discussion name and select the topic to associate with the discussion.

6) Select the suppliers who can access the topic.

7) Click Save.

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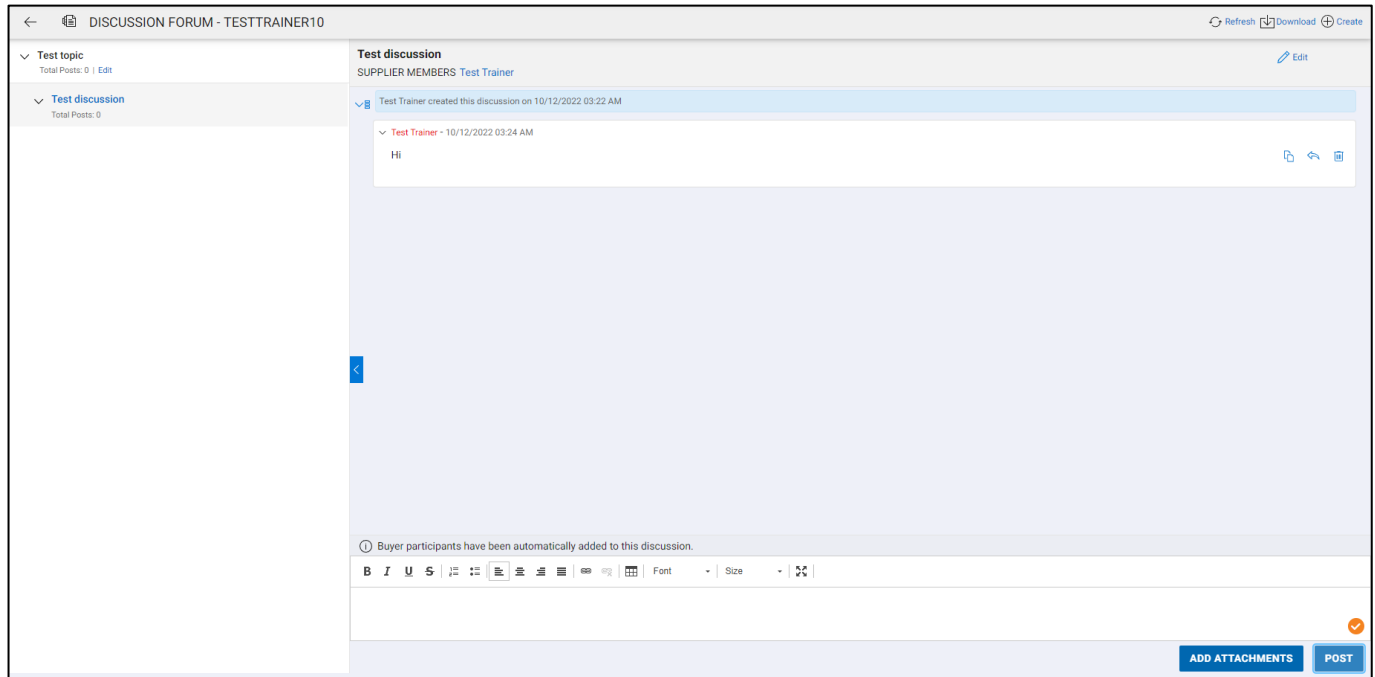8) Click Add Attachments 📑 to attach documents, if any.

9) 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.

About SMART by GEP

GEP helps global enterprises operate more efficiently and effectively, gain competitive advantage, boost profitability, and maximize business and shareholder value.

Fresh thinking, innovative products, unrivalled domain and subject expertise, and smart, passionate people – this is how GEP creates and delivers unified business solutions of unprecedented scale, power, and effectiveness.

With 14 offices and operations centres in Europe, Asia and the Americas, Clark, New Jersey-based GEP helps enterprises worldwide realize their strategic, operational, and financial objectives.

Recently named Best Supplier at the EPIC Procurement Excellence Awards, GEP is frequently honoured as an innovator and leading provider of source-to-pay procurement software by top industry and technology analysts, such as Forrester, Gartner, Spend Matters, Pay stream and Ardent Partners. GEP also earns top honours in consulting and managed services from the industry's leading research firms, professional associations and journals, including Everest Group on its PEAK Matrices of Procurement Services Providers and Supply Chain Services Providers; Nelson Hall on its NEAT Matrix of Global Procurement BPO Service Providers; HfS in its Blueprint Report on Procurement-as-a-Service; and ALM Intelligence in its Vanguard Reports on both Procurement Consulting and Supply Chain Consulting.

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