

SUPPLIER

SUPPLIERS ON-BOARDING USER MANUAL

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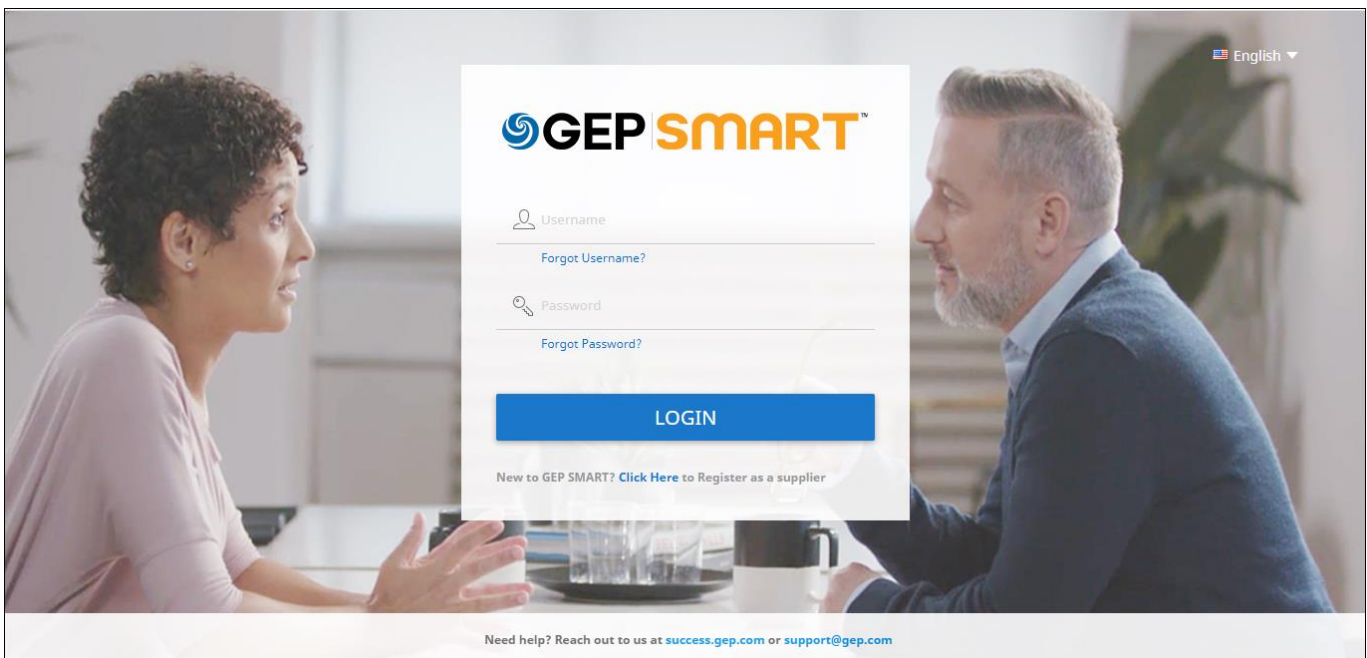
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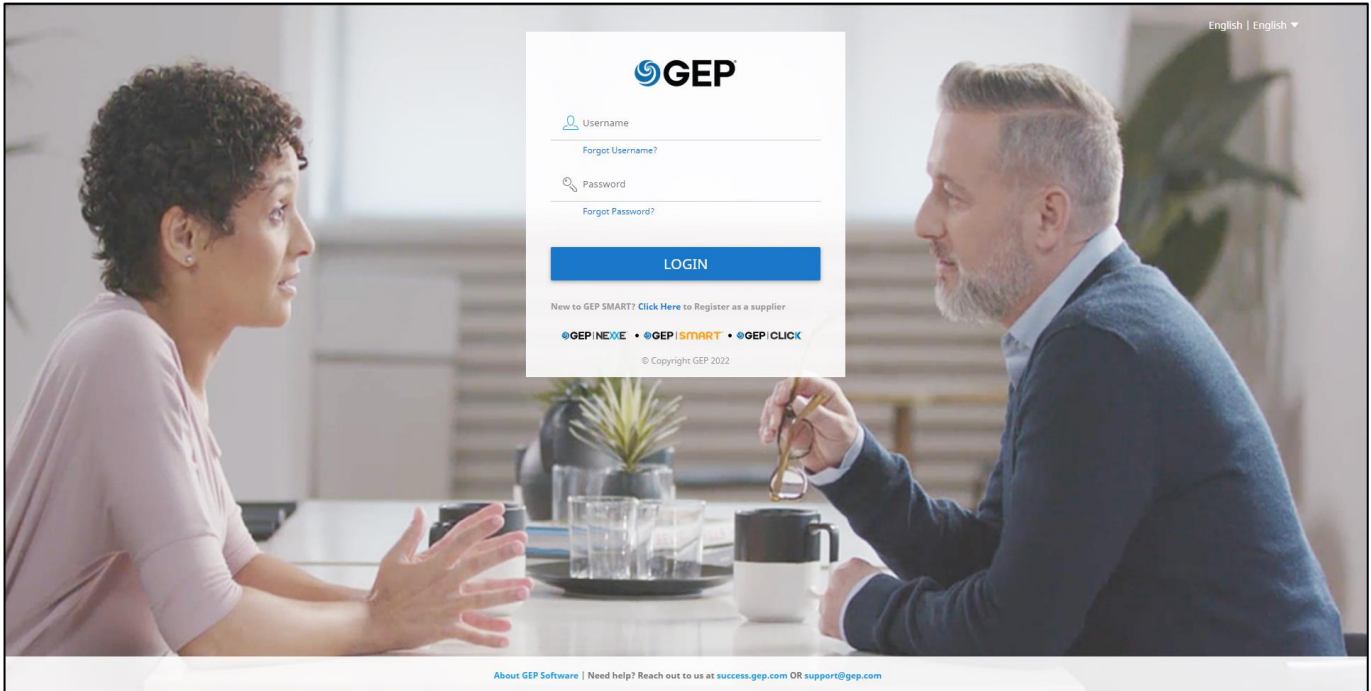
Chapter 1: Getting Started

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:

straumanngroup UAT | Sourcing | Contract | Supplier | Search | [User Icon]

Documents

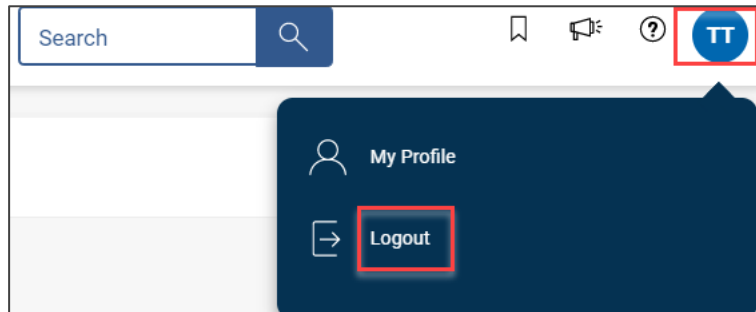
RFX | AUCTION | Manage Attributes | Filters

Event Name	Event Number	Created By	Created On	Last Modified On
Training 2410	[STMN]-[RFX]-000236	Elias De Ceuster	10/24/2022	10/26/2022
Training 2410	[STMN]-[RFX]-000233	Elias De Ceuster	10/24/2022	10/26/2022
[STMN]-[RFX]-000234	[STMN]-[RFX]-000234	Elias De Ceuster	10/24/2022	10/24/2022
test	000209-Oct2022	Elias De Ceuster	10/19/2022	10/24/2022
000205-Oct2022	000213-Oct2022	Elias De Ceuster	10/20/2022	10/21/2022
000205-Oct2022	000205-Oct2022	Elias De Ceuster	10/18/2022	10/20/2022
000205-Oct2022	000212-Oct2022	Elias De Ceuster	10/19/2022	10/19/2022
000205-Oct2022	000208-Oct2022	Elias De Ceuster	10/19/2022	10/19/2022

Rows Per Page: 10 | 1 - 8 Of 8

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.



Chapter 2: Supplier Registration

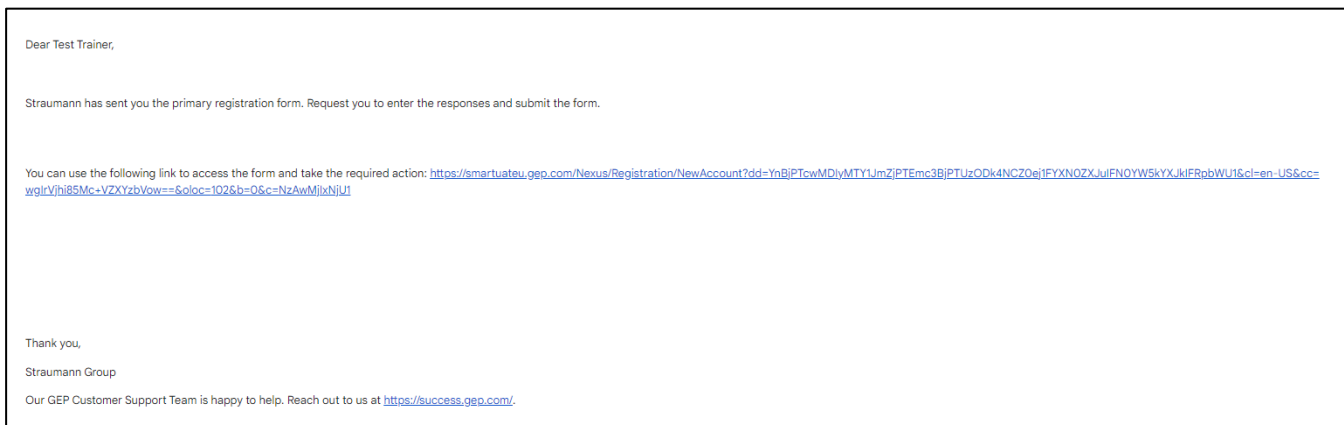
The Registration Information tab has relevant registration fields that are available upfront to you; you do not have to go into the registration form to view responses. However, you can update the information anytime.

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:




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.

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UAT



Hi Test Trainer ,

You have been invited by Straumann to be a supplier and represent TestTrainer10

[Register Now](#) [I have a SMART by GEP account](#)

Register Now - Click on "Register Now" If you do not have an existing account with SMART by GEP and want to create fresh login Credentials or If you want to have separate set of Credentials apart from your existing account with SMART by GEP.

I have a SMART by GEP account - Click on "I have a SMART by GEP account" If you have an existing set of Credentials and want to link this new profile.

Thanks,
SMART by GEP Team

Supporting you from United States, Asia and Europe

Phone:
USA:+1 732 428 1578
Europe:+42 022 59 86 501
Asia:+91 22 61 372 148
Australia:+61 285 181 914
UK:+44 203 478 6123
Brazil:+55 113 181 5451

Email: Support@gep.com

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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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 ⓘ

- 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

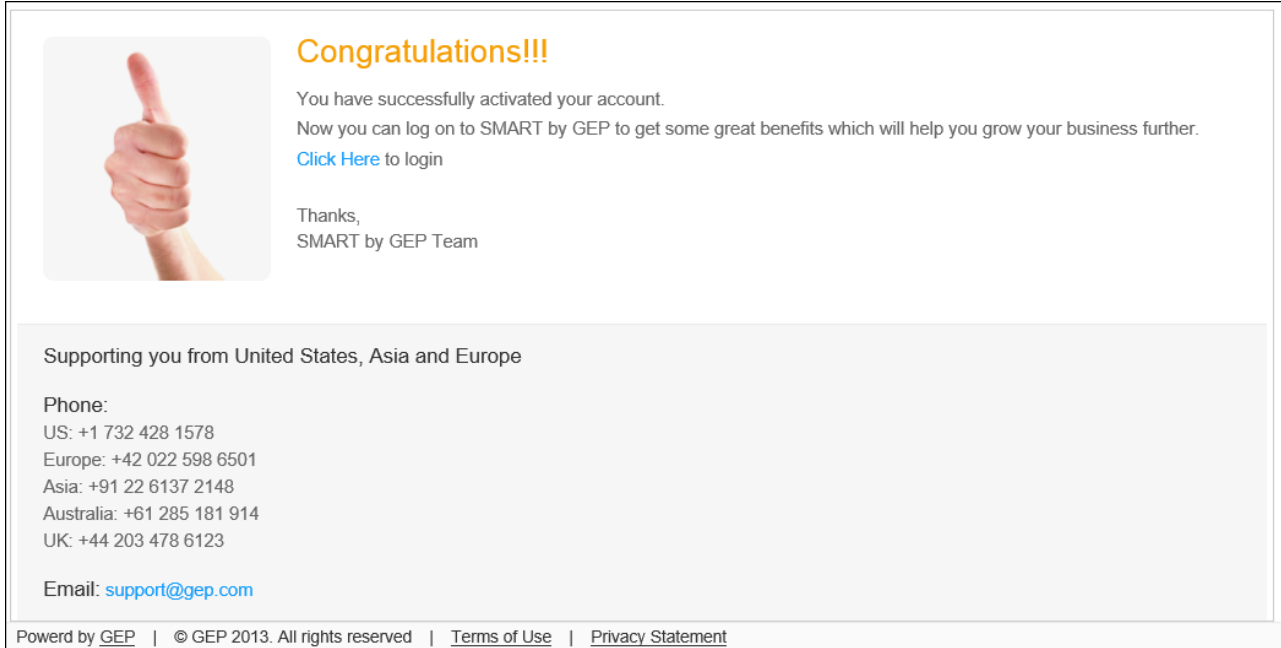
Phone:

USA:+1 732 428 1578
Europe:+42 022 59 86 501
Asia:+91 22 61 372 148
Australia:+61 285 181 914
UK:+44 203 478 6123
Brazil:+55 113 181 5451

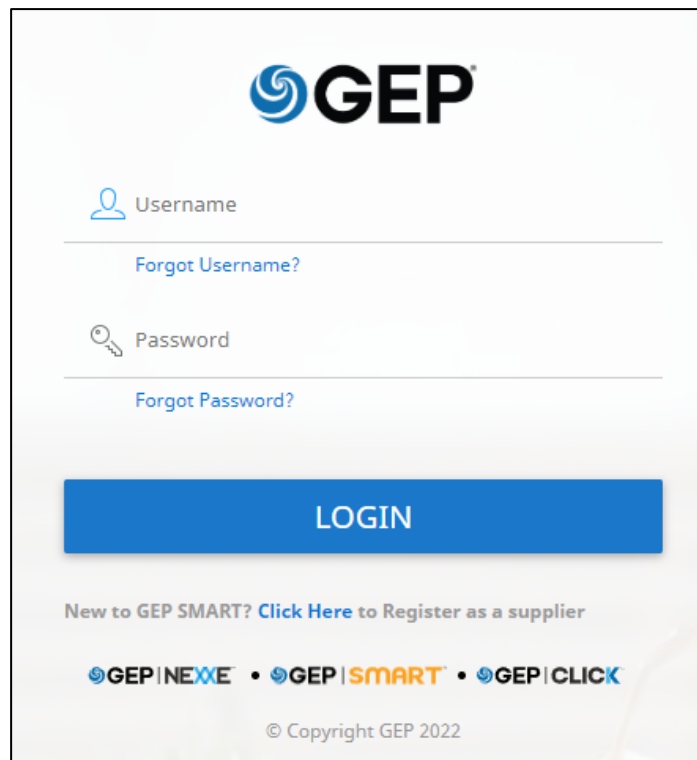
Email: Support@gep.com

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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.



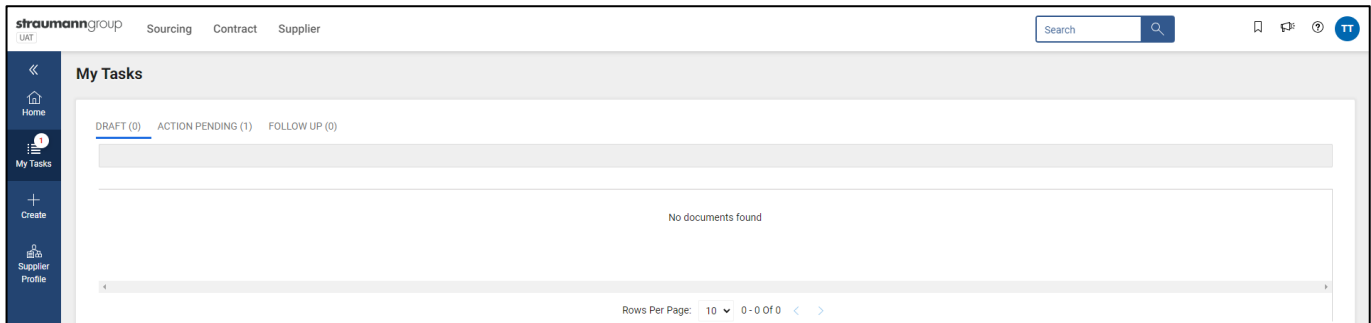
- 5) Click **Click Here** to login to GEP SMART system and complete your profile. You can login to the tool with the Username and Password created in the Primary Registration Form.



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 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

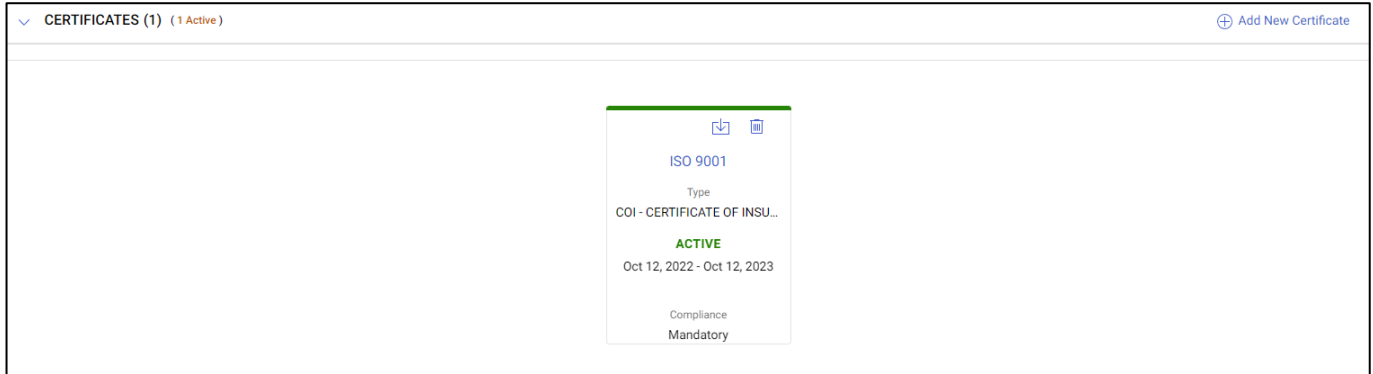
The Identification Information section holds your tax identification information such as the identification type and number.

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

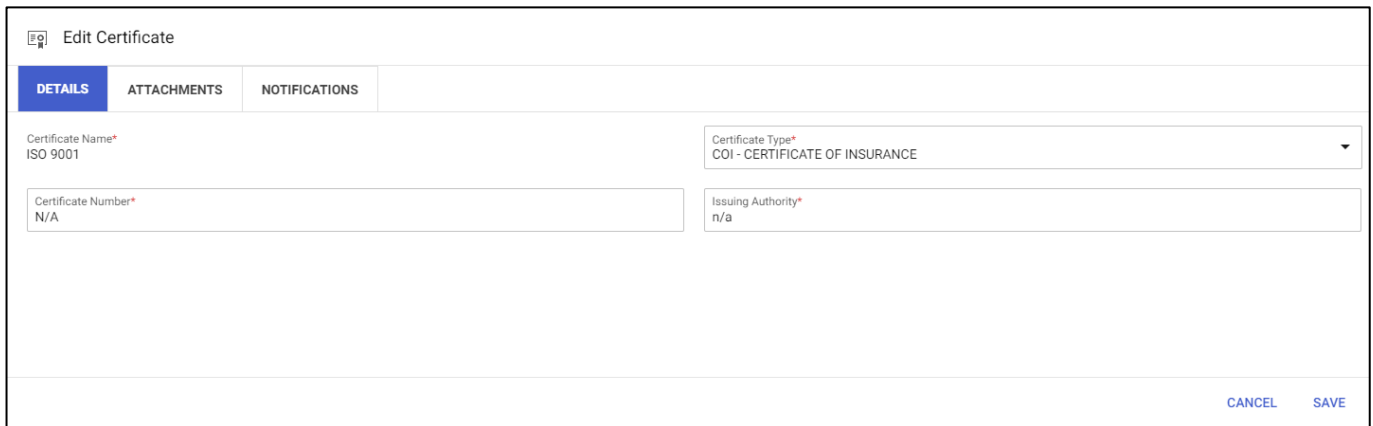
3.1.3 Certificates

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

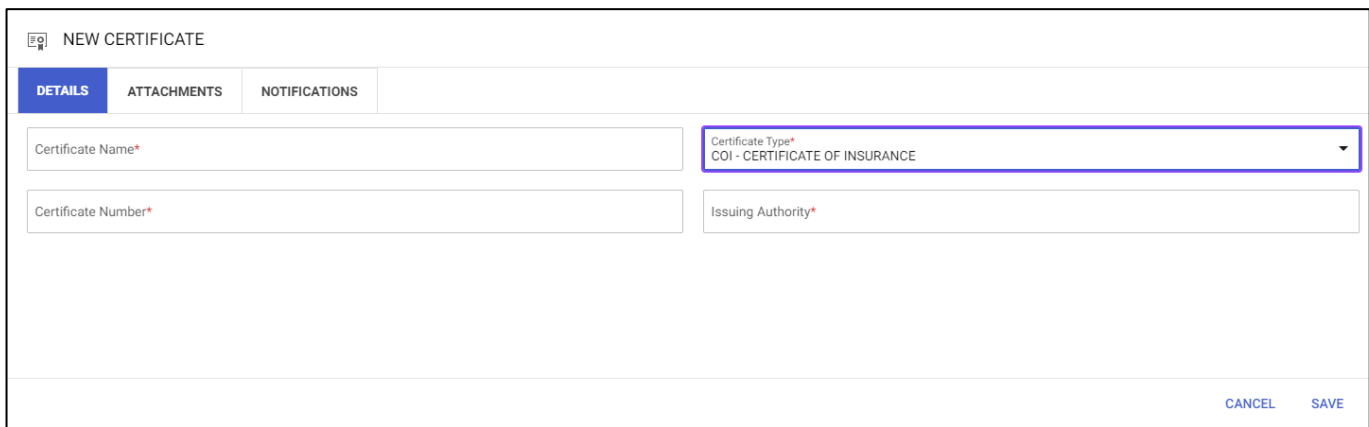


CHOOSE CERTIFICATE (23)

- ISO 9001
- ISO 9002
- ISO 9003
- ISO 14001
- ISO 27001/2
- TL 9000
- TS 16949

ADD NEW CANCEL DONE

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



NEW CERTIFICATE

DETAILS ATTACHMENTS NOTIFICATIONS

Certificate Name*

Certificate Type*
COI - CERTIFICATE OF INSURANCE

Certificate Number*

Issuing Authority*

CANCEL SAVE

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.

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.

▼ DIVERSITY STATUS (MAINTAIN A STATUS, IF CERTIFIED AS A DIVERSE BUSINESS)(7) + Add New Diversity Status

Search ↕

LGBTQ Owned

ACTIVE

Oct 29, 2020 - Oct 29, 2021

Compliance
Non Mandatory

Black/African American ...

ACTIVE

Oct 19, 2020 - Oct 19, 2021

Compliance
Non Mandatory

Owners with Disabilities

ACTIVE

Oct 19, 2020 - Oct 19, 2021

Compliance
Non Mandatory

Asian American Owned

● ○ ○ ○

▼ DIVERSITY STATUS

ⓘ Please ensure you click on save icon in Action column for saving all changes.

Diversity Type*	Issuing Authority	Certificate Number	Compli...	Mandatory for Compliance	Attachment	Notifications	Action
<input type="checkbox"/> Small Business (SB)	<input type="text"/>	<input type="text"/>		<input checked="" type="checkbox"/>	Contract-service.pdf	View Details	
<input type="checkbox"/> Woman Business Enterprise (WBE)	<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	Dummie.pdf	View Details	

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:



REGISTRATION INFORMATION		
*indicates required fields		
Additional Information - S...	QUESTIONNAIRE(1)	
Titles	Total Questions	Pending Mandatory Questions
Additional Information	15	0 / 3
		Rows per page: 5

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.


LOCATION INFORMATION (9 Locations: 1 Headquarter , 8 Remit To Location, 7 Ordering Location)				+ Add New Location
*indicates required fields				
<input type="checkbox"/>	Location Name	Type	Phone Nos.	Roles & Contacts
<input type="checkbox"/>	test	Headquarter	Pri : 9039852554 Sec :	
<input type="checkbox"/>	Austria	Ordering Location + 1 More	Pri : 987372655 Sec : 97766552	
<input type="checkbox"/>	BankingInfo	Remit To Location	Pri : Sec :	
<input type="checkbox"/>	Bankinginfo1	Remit To Location + 1 More	Pri : Sec :	
<input type="checkbox"/>	Bankinginfo2	Remit To Location + 1 More	Pri : Sec :	
<input type="checkbox"/>	Czech Republic	Remit To Location + 1 More	Pri : 434516 Sec : 6756789	










- 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


3.1.6.1 Adding a Location

To add a location:

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

LOCATION INFORMATION  (1 Location: 1 Headquarter)				 Add New Location
*indicates required fields				
<p> To complete the section at least one location of any type is required apart from the Head Quarter location</p>				
<input type="checkbox"/>	Location Name	Type	Phone Nos.	Roles & Contacts
<input type="checkbox"/>		Headquarter	Pri : 04875438 Sec :	 
<input checked="" type="checkbox"/>	Brussels	Ordering Location	Pri : 1234567 Sec :	 
<input type="checkbox"/>	Testoffice	Manufacturing Loc...	Pri : 87654321 Sec :	 

- 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.

 Add New Location

INFO IDENTIFICATION INFO

Location Name* Location Code(Leave blank to auto generate)

PPC_LocationID Address Line 1*

Address Line 2 (Optional) City*

County (Optional) Country*

State* Zip Code*

Choose Location Type Primary Business Phone (Optional) Extn

This is required field.

Sec. Business Phone (Optional) Extn

Fax No. (Optional)

CANCEL SAVE

- d) 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.

3.1.7 Contact Information

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

CONTACT INFORMATION (1) (1 Registered)							+ Add New Contact
*Indicates required fields							
All 1	Registered 1	Pending Activation 0	Invited 0	Non-Invited 0			
Full Name	Status	Email ID	Language	Primary Phone No.	Mobile Number	Ro	
<input type="checkbox"/> Test Trainer Last Login : Wednesday, October 12, 2022 2:08 AM	Registered	testtrainerkpmg10@gmail.com	English American	09877898			

- 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](#).

3.1.7.1 Adding Contacts

To add a new contact:

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

 Add New Contact

**indicates required fields*

First Name*	Last Name*	E-mail Address*		


Designation <i>(Optional)</i>	Default Role Please Select ▼			

Primary Business Phone*	Extn	Secondary Business Phone <i>(Optional)</i>	Extn	Fax No.
ISD Code <i>(Optional)</i> Please Select ▼	Mobile Number <i>(Optional)</i>			
<input type="checkbox"/> Send Invitation				CANCEL SAVE

- 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.

3.1.8 Business Information

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

▼ BUSINESS INFORMATION

**indicates required fields*

Currency Please Select ▼	Annual Revenue (In Millions)	Average Profit (Percentage)	Year of Incorporation Please Select ▼	Business Type Please Select	Total Employees
<input type="checkbox"/> Auto-Acknowledge Order					
ERS Enabled <input type="radio"/> Yes <input checked="" type="radio"/> No					
Payment Type Please Select					

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:

✓ **MARKETING INFORMATION**

*indicates required fields

Description (Optional)

Supported Currencies
Euro Member Countries

Supported Languages
English

Current Customer

Website:

www.facebook.com/

www.linkedin.com/

www.twitter.com/

3.1.10 Payment Terms

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

✓ **PAYMENT TERMS**

*indicates required fields

Entity	Payment Terms
All	6000 - Within 60 days Due net (D...

Rows per page:

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.

DOCUMENTS

*indicates required fields

Form	No Records Found
Scorecard	
RFX	
Auction	
Contract	

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**.



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

Note

← CHANGE HISTORY (RONDO.AG)

Version 28 ▾

Status : Approved

Created by : Winfried Hann

Created on : 08/04/2020

<p>LOCATION INFORMATION</p>	444 CHANGES
<p>CONTACT INFORMATION</p>	4 CHANGES

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.

The screenshot shows the profile page for Rondo AG (ID: 1000071), which is 'APPROVED / READY FOR MDG'. The left sidebar lists sections: BASIC DETAILS, IDENTIFICATION INFORMATION, CERTIFICATES, DIVERSITY STATUS, LOCATION INFORMATION, CONTACT INFORMATION, BUSINESS INFORMATION, TRANSACTION TYPE, MARKETING INFORMATION, PAYMENT TERMS, and DOCUMENTS. The main content area includes:

- YOUR COMPANY LOGO HERE**: A placeholder for a logo with supported formats (png, jpeg, jpg), a 5MB limit, and a 200x200 pixel resolution.
- Supplier's Legal Name***: RONDO AG
- Parent Company's Identification ...**: Parent Company Name
- Parent Company Name**: --
- Doing Business As**: --
- Formerly Known As**: --
- Category***: Consulting Service... +11 More
- Region**: Not Applicable
- Supplier Managers***: Admin + 1 More
- Status**: Approved / Ready for MDG

 Below these are expandable sections for IDENTIFICATION INFORMATION, CERTIFICATES, DIVERSITY STATUS, and LOCATION INFORMATION (9 Locations: 1 Headquarter, 8 Remit To Location, 7 Ordering Location). At the bottom, a progress bar shows 0% profile completeness, with buttons for CLOSE, SAVE, and CREATE CHANGE REQUEST.

To initiate a discussion: in the RFx event:

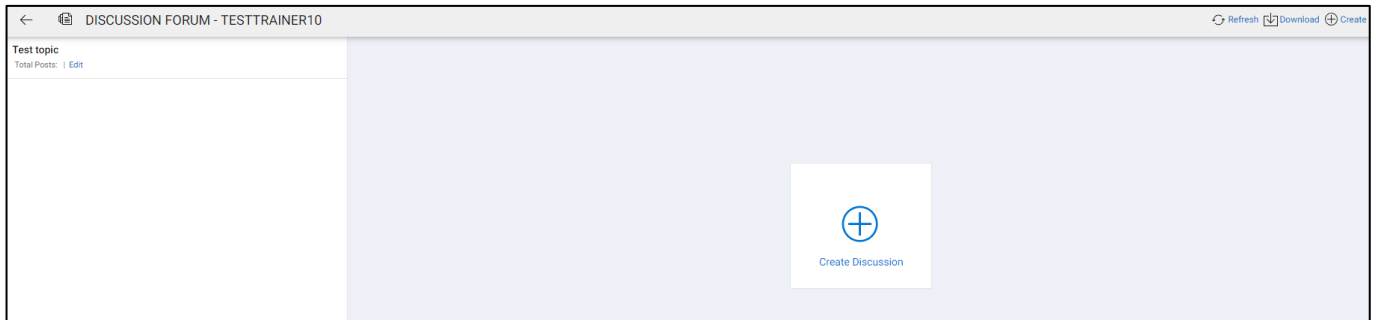
- 1) Click the **Discussion Form**  icon. The following screen appears.

The screenshot shows the 'DISCUSSION FORUM - TESTTRAINER10' page. It features a header with 'Refresh', 'Download', and 'Create' icons. The main content area displays 'No topics available' on the left and a large blue button with a plus sign and the text 'Create Discussion' in the center.

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

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

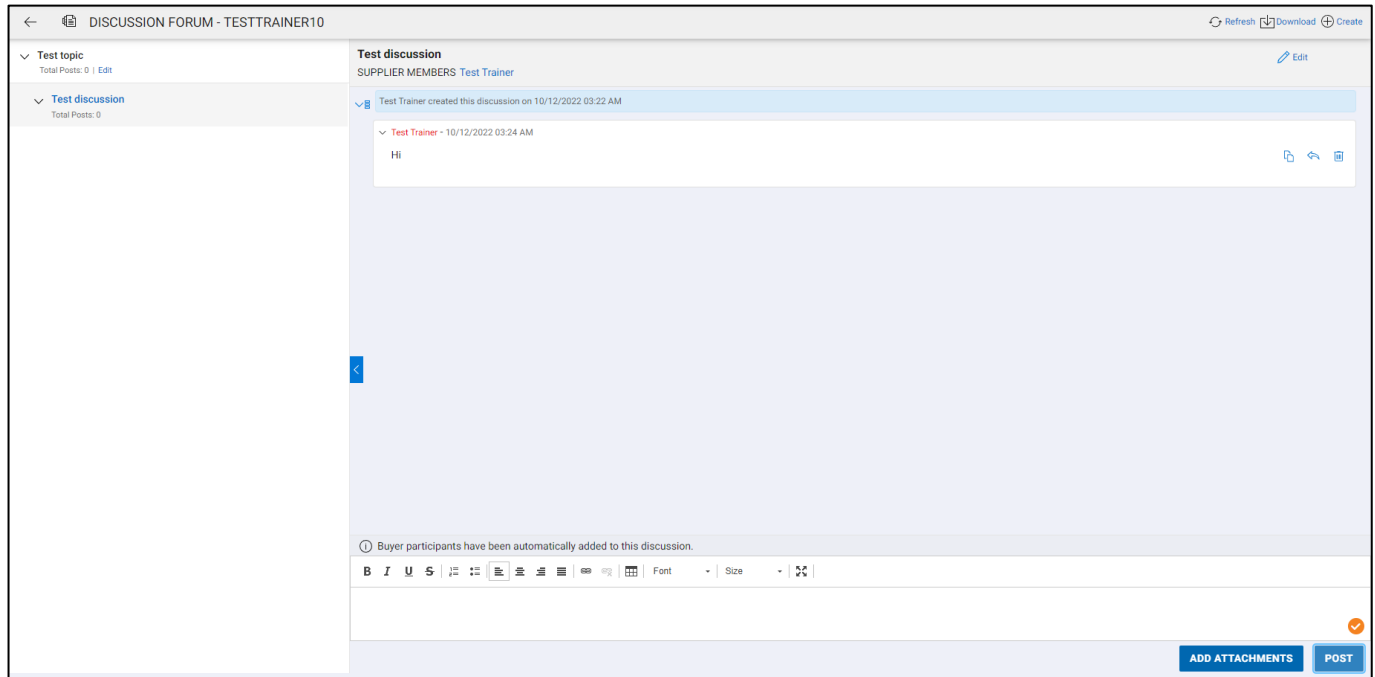
The newly created topic will appear in the left pane.




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


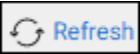

Select	Contact Name	Role	View	Post	Admin
<input checked="" type="checkbox"/>	Test Trainer testtrainerkpmg10@gmail.com	Supplier User - Primary Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 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.



- 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 the name of the discussion.
	Refresh the page.
	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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