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Supplier Registration & Navigation Guide

Supplier Training

Presented By:

BravoSolution Education Services

Contents

In this guide, we will show you how to:

- ✓ Register as a Supplier on the Sourcing Portal
- ✓ Complete the Registration and Basic Profile
- ✓ Select Categories of Supply
- ✓ Benefits of Category Classification
- ✓ Login as a Supplier
- ✓ Access the Supplier Home Page and Dashboard
- ✓ Access User Management and Sourcing Events

Please keep in mind that this is a generic guide to assist in registering on the eSourcing platform powered by BravoSolution. It is not specific to any project, contract or buying organization!

Register as Supplier

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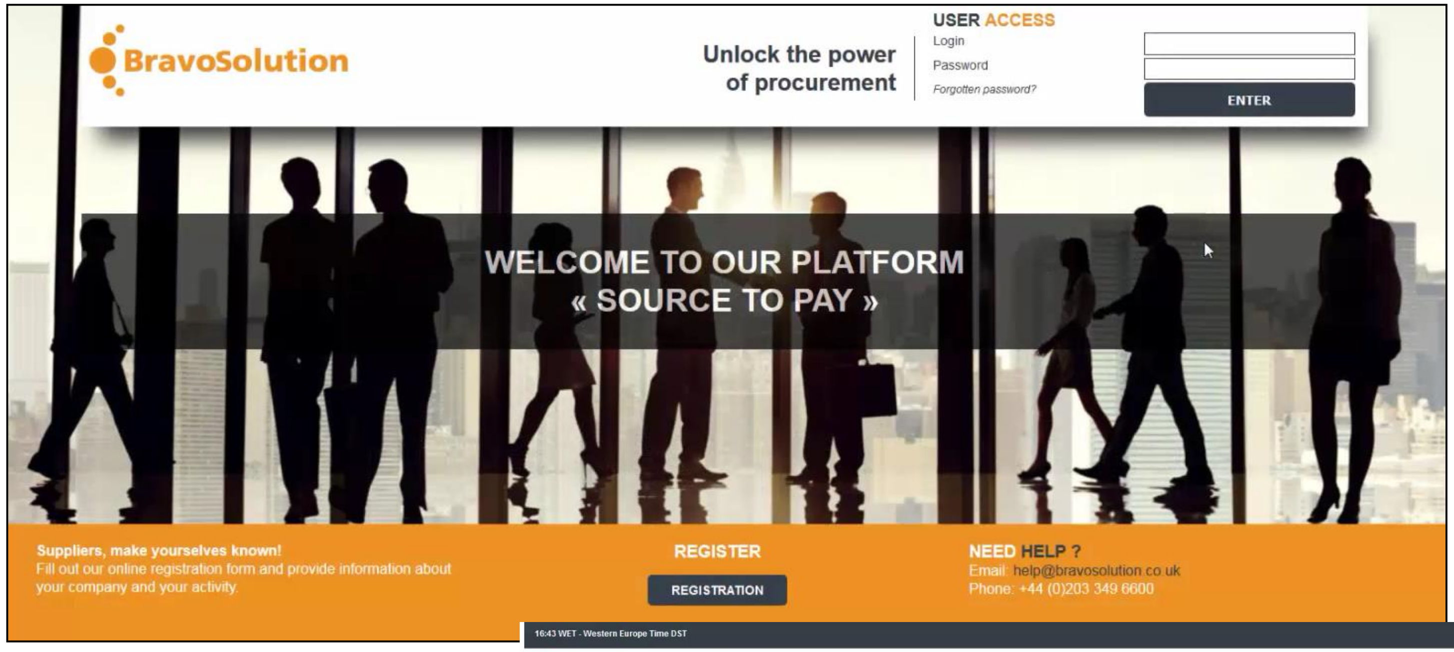

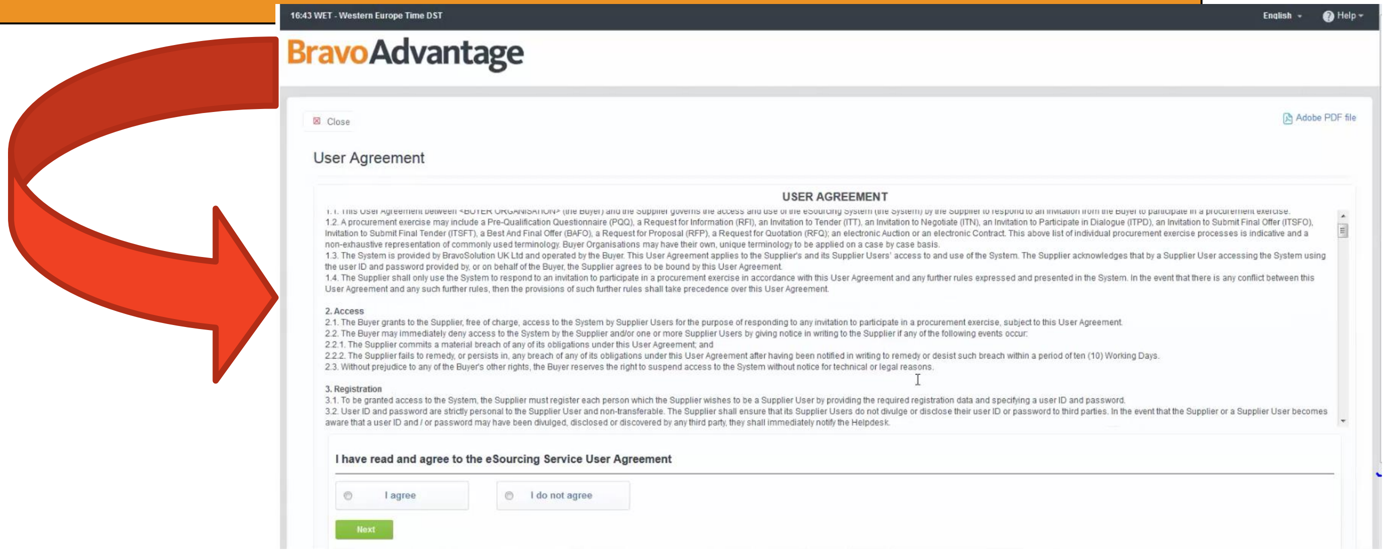

1. Access the Sourcing portal *.
2. Click **Register** on the Login page to create an account.
3. You may be directed to a User Agreement.
4. Read the User Agreement.
5. Tick **I agree** and click **Next** to access the Registration form.

Note: **Registration on the portal is free.**

* The Sourcing portal Login page can be customized to reflect the branding of the buyer organisation and may differ in appearance from what is shown here.

Register as Supplier

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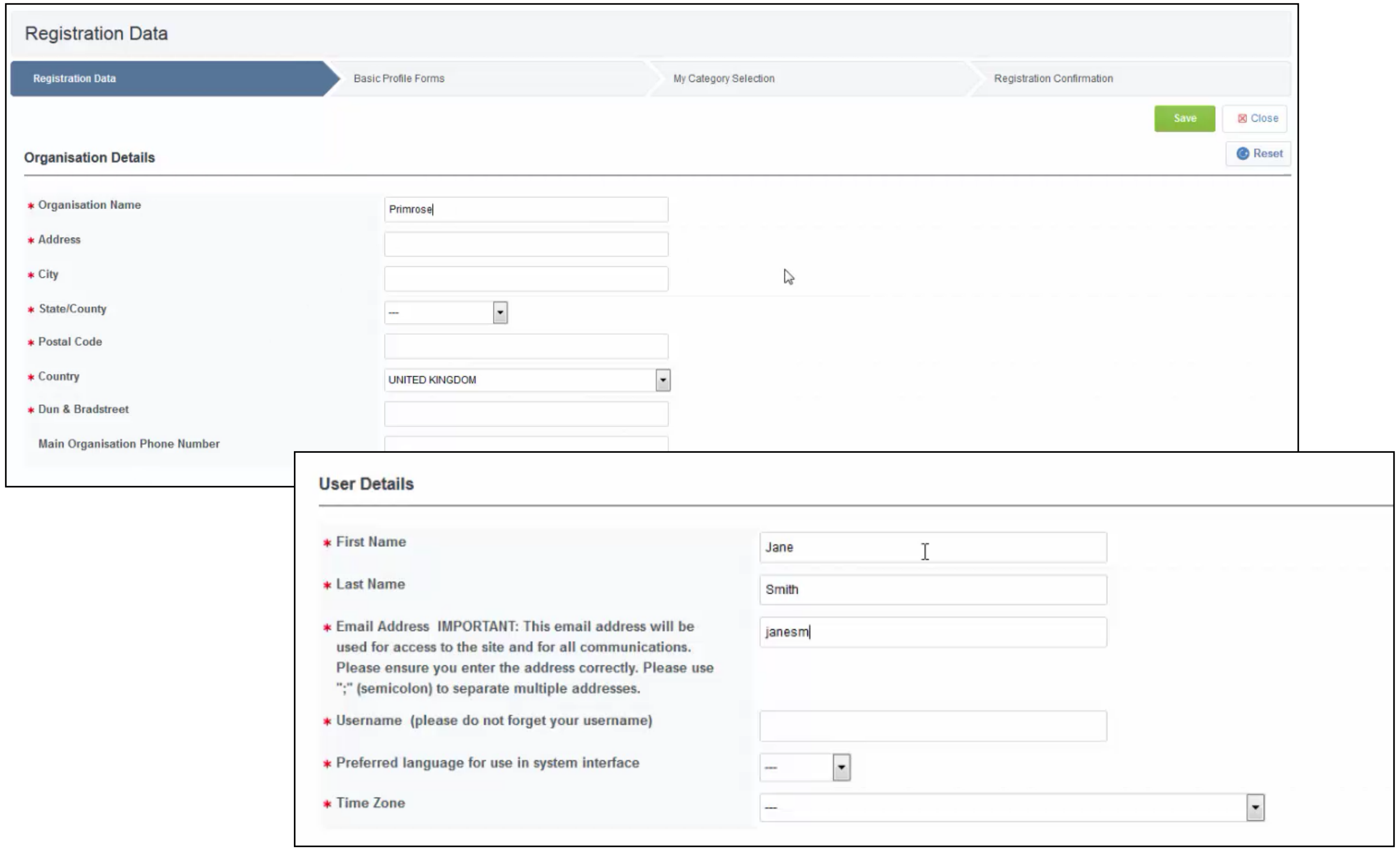
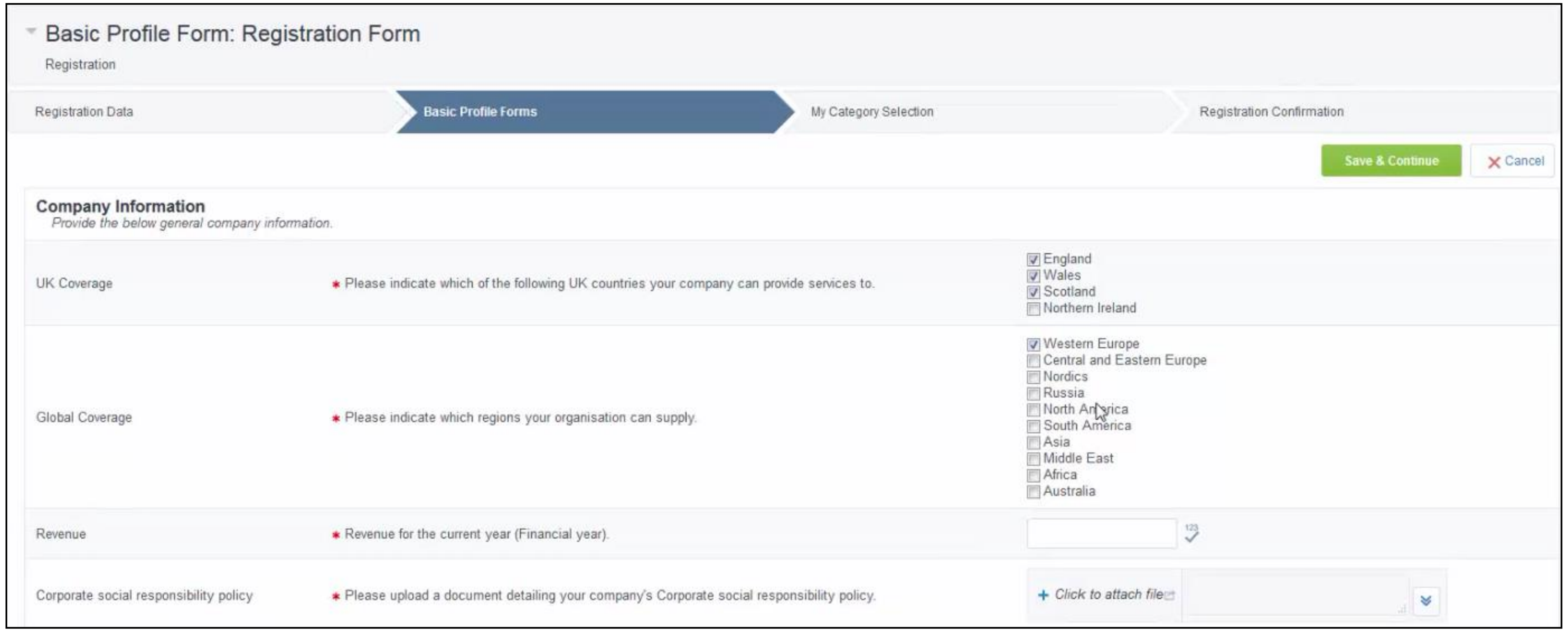


1. Fill out all mandatory fields, marked with a red asterisk(*).
2. The **Organisation Details** and **User Details** collect information for the individual within your organisation that will manage sourcing events on the portal.
   - Ensure the email address* is correct in order to receive the registration confirmation email with a temporary password for your supplier account.
   - To register multiple email addresses, use a semicolon to separate them.
   - Keep track of the Username entered, you will need this to login.
4. Once all mandatory fields are complete, click **Save**.

* There may be a user email address validation. If so, click Send Validation Code. Check the email address entered. It may take a few minutes for the code to be sent. Enter the code into the validation field to continue.

Complete Basic Profile Form



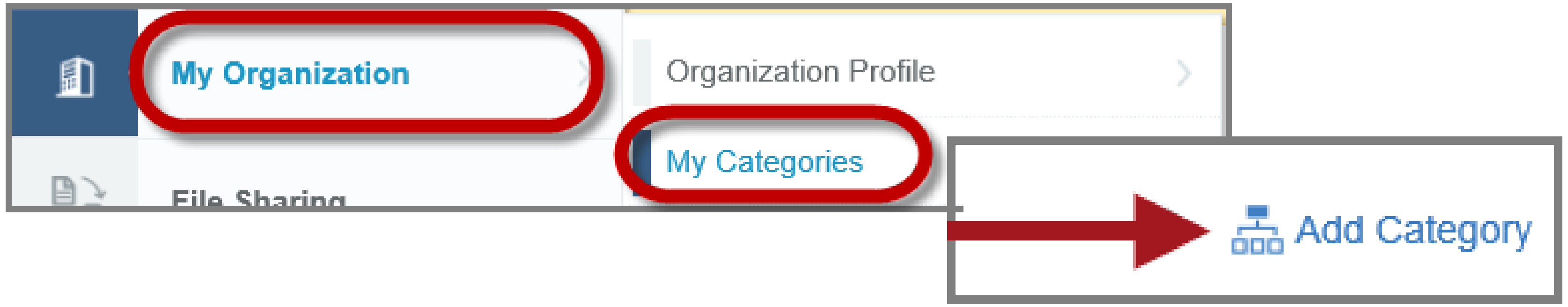
Basic Profile Form

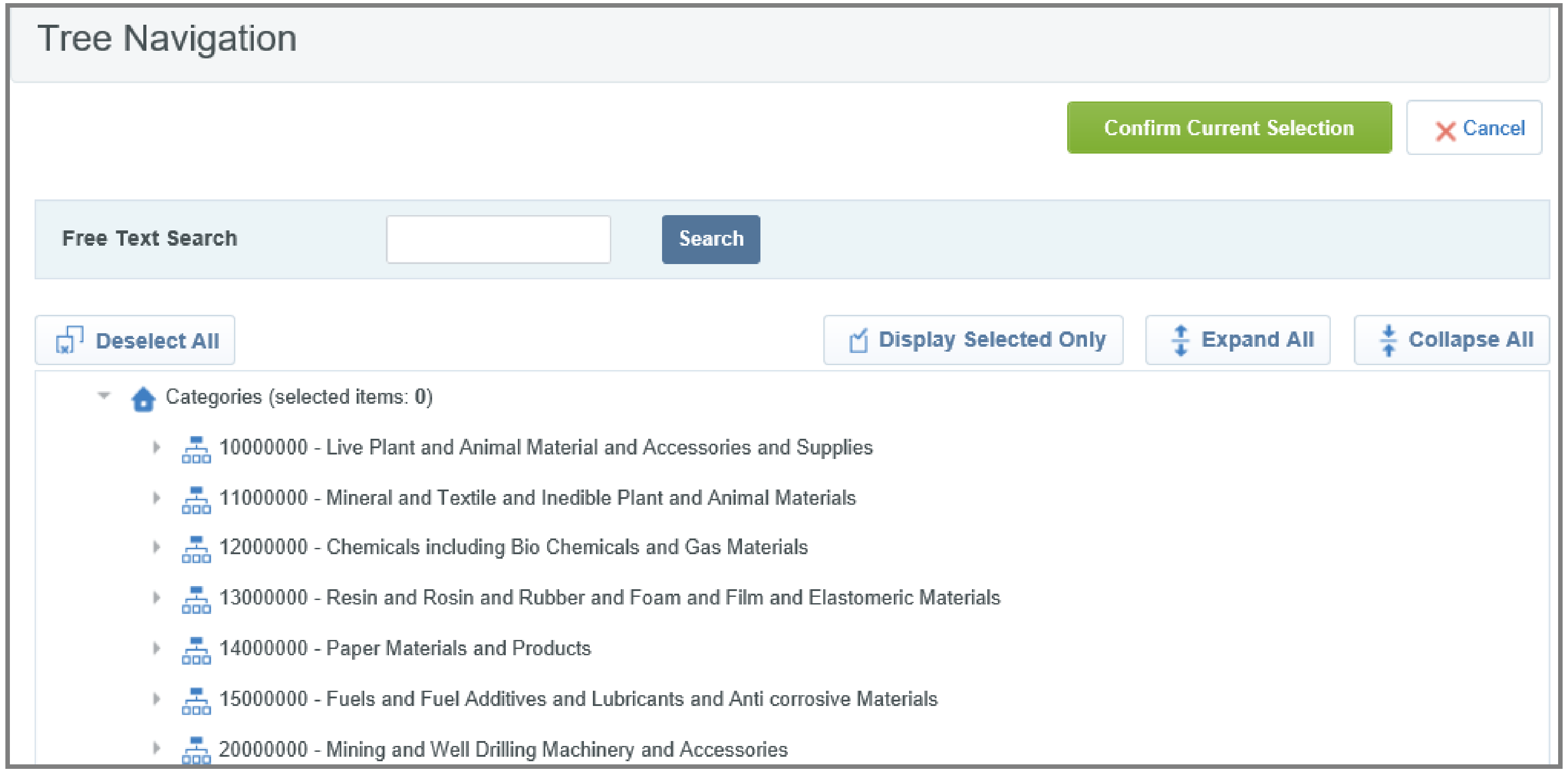
- You may be directed to a Basic Supplier Profile Form to provide additional organisation information.
- **You must complete this information to be considered for sourcing events**.
- This information will be used to auto-populate sourcing events.
- You may update your profile at anytime following registration.

Complete the Form

- Complete all mandatory fields.
- **Click to Attach Files** allows you to upload files to the system.
- Once all mandatory fields are complete, click **Save & Continue**.

Select Categories of Supply





Categories

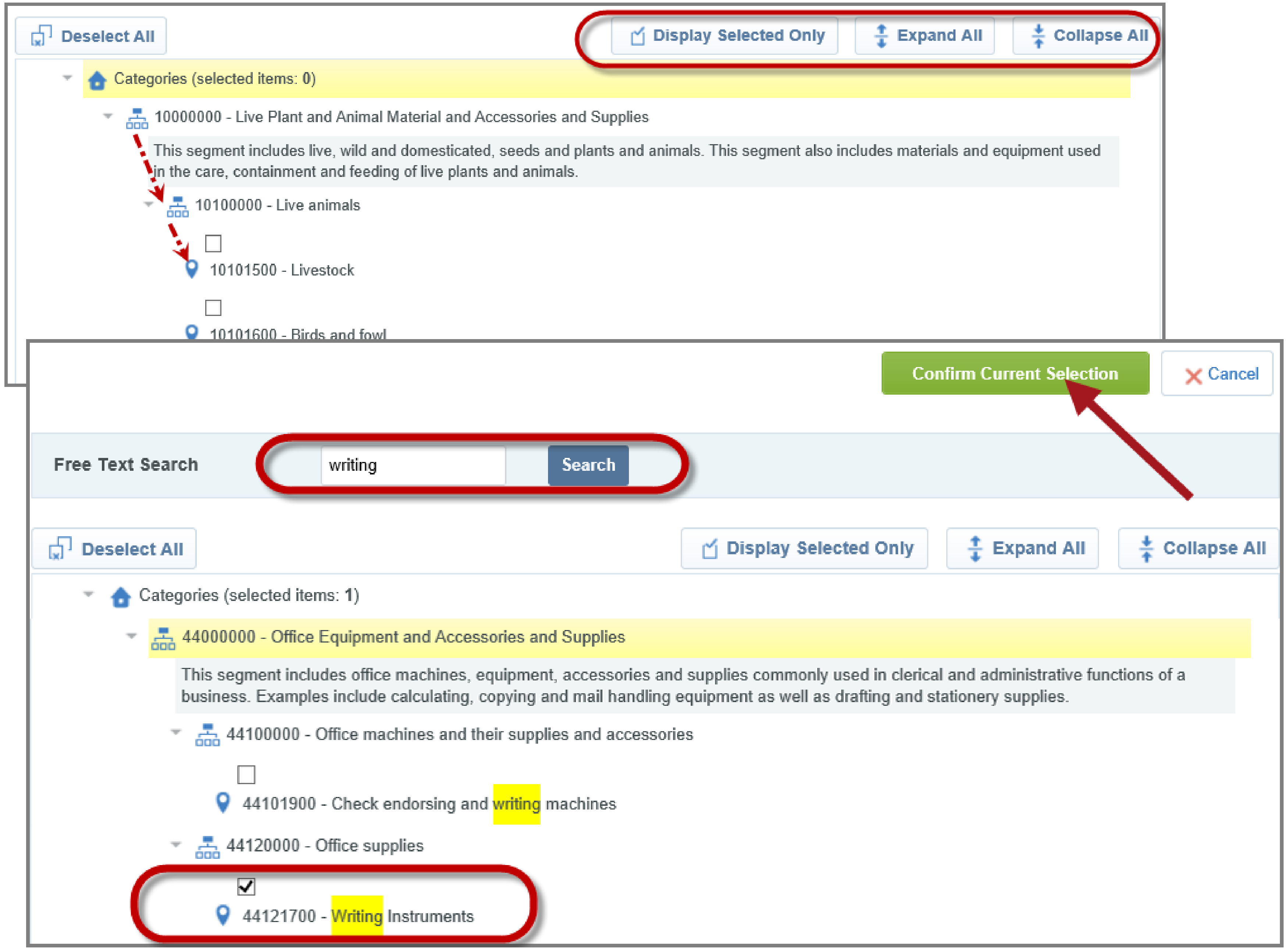
- You should classify your organization against the Category Tree, to indicate the categories of supply your organization provides.
- Your Classification may be used as the basis for a formal Supplier Qualification called Category Assessment.

Access Category Tree

Category classification may be completed during or after the Registration process.

1. To access the Category Tree post registration, browse to **My Organization,** then click **My Categories**.
2. Click **Add Category** to view the Category Tree.

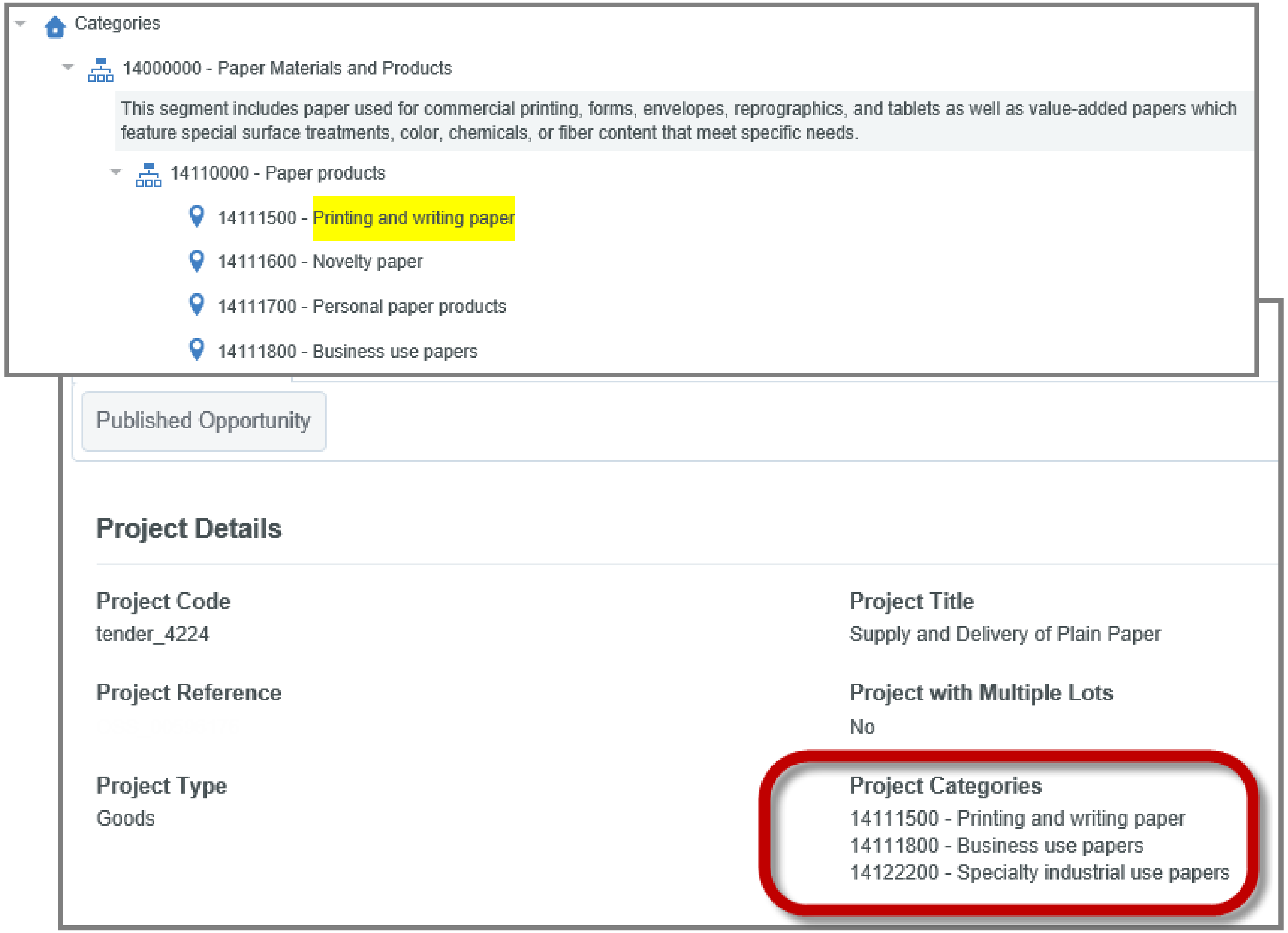
Category Classification continued



Search and Select Categories

1. Use the **Free Text Search** feature and enter a keyword or Category code, then click '**Search**'.
2. The tree will refresh and display all matching Categories.
3. Each Category has levels of subcategories. You can use the '**Display Selected Only**', '**Expand All**' and '**Collapse All**' buttons to control the display of subcategories in the tree.
4. Tick the box to select your Category, then click '**Confirm Current Selection**'
5. Depending on the category selected you may be required to complete additional category specific forms.

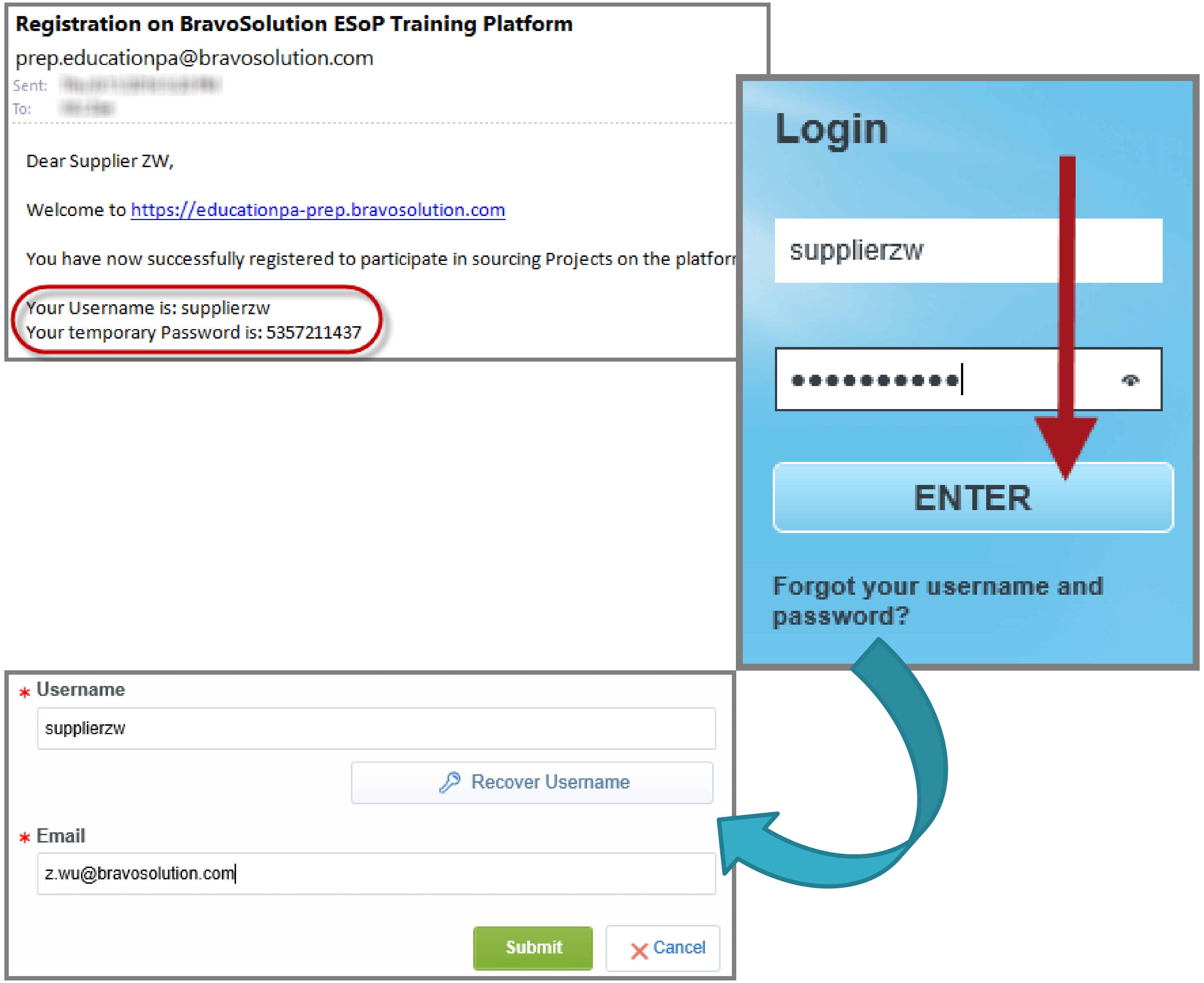
Benefits of Category Classification



Opportunity Listings are used by the Buying organizations to advertise future public sourcing events for specific categories of supply.

It's very important to classify your organization in the most relevant categories and in as many categories as possible, to ensure that you get all related opportunity listing alerts and never miss a chance to participate in sourcing events!

Login as Supplier



Login

- Click the link in the Registration Confirmation email to access the Login page.
- Log in with the Username and Temporary password, found in the email.
- As a security measure, you will be required to enter and confirm a new password.

Forgot your Password?

- Click on the “**Forgot your username and password?**” link (text may be different on your platform)
- Fill in your username and email address.
- You will receive a temporary password via email.

Login as Supplier – Forgot Username

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Dear User,

This email contains a link to be used if you have forgotten your username to access the site BravoSolution ESoP Training Platform at URL https://educationpa.bravosolution.com

The link is temporary and will expire after a few hours, if still required after that time you will need to request a new Username reminder link.

Click the following link to access your Username:
https://educationpa.bravosolution.com/esop/guest/login.do?qvu=256981120156A39D1C12

After you have used this link you can delete this email as the link can be used only once.

NOTE: If you did not request this Username reminder, please disregard this message. Nothing will happen to your account and you will be able to log in using your login details as usual.

Forgot your Username?

- On the Login page, click **Forgot your username and password?** (text may vary)
- Click **Recover Username**.
- Fill in your email address and a validation value.
- You will receive an email with a link to access your Username.
- Please use the second link in the email to access your Username.
- The Username reminder link will expire after a few hours and can only be used once.

Access the Supplier Home Page

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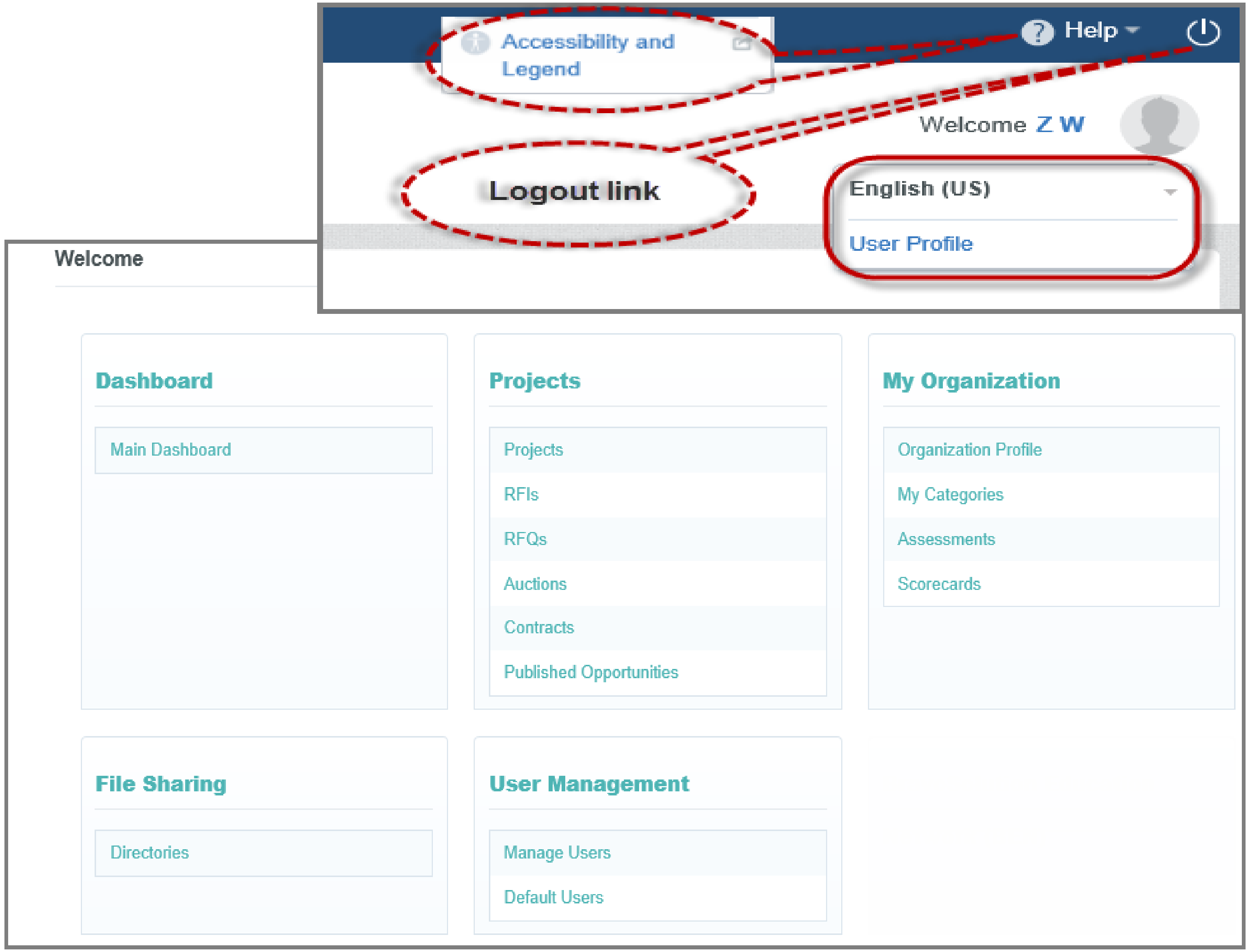


The Supplier Home Page is usually the default page displayed after successful login.*

Universal Links

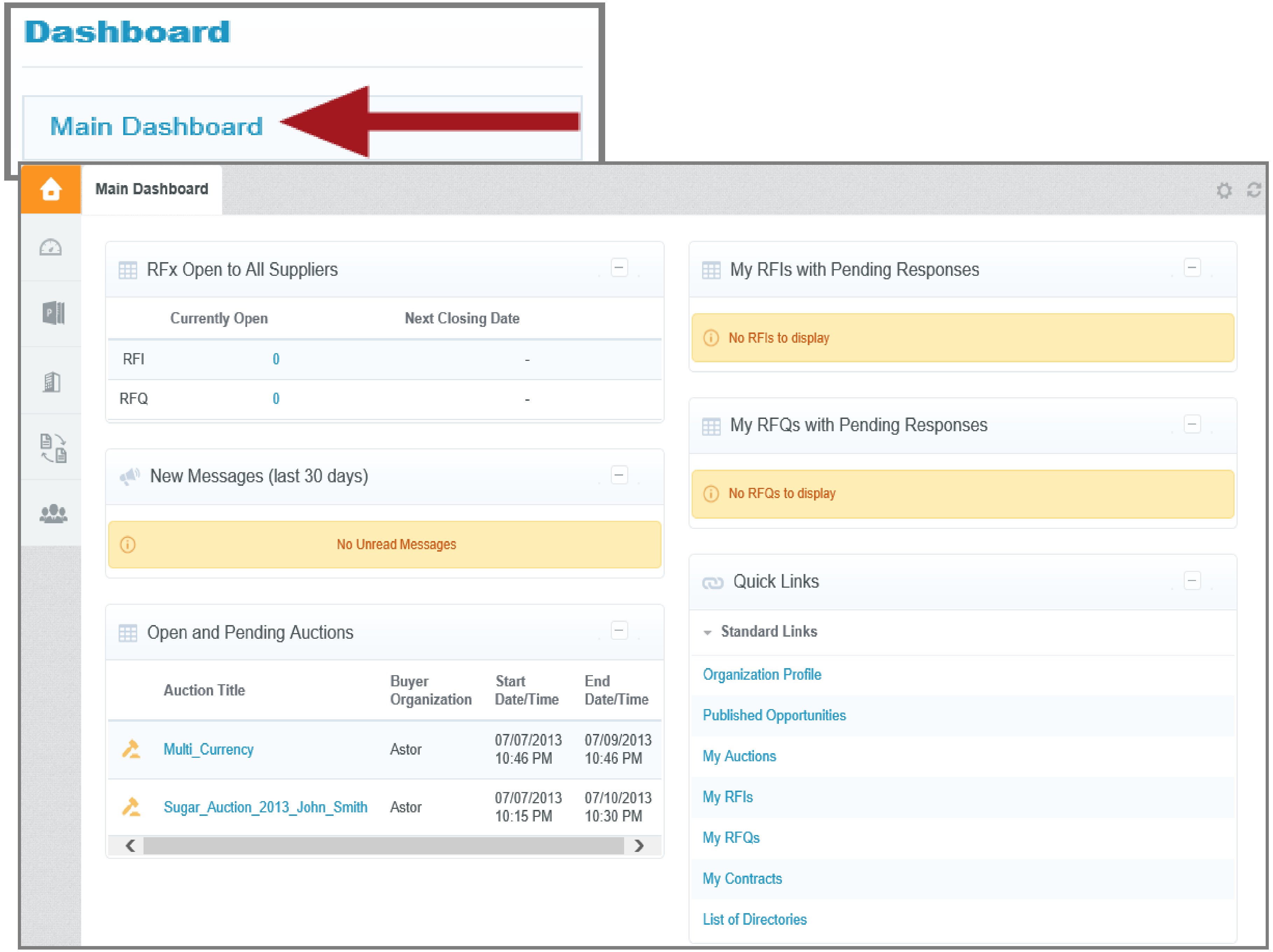
- On the upper right corner of the page, you can find links to Logout, and to view Accessibility guidance.
- You can also find links to access your User Profile to change your language, user details and/or password.

Modules & Links

- The main area of the page displays links to the available modules, so you can use this page to reach any part of the platform.

*On some platforms, the Dashboard may be the default page that is displayed after you login.

Access the Dashboard



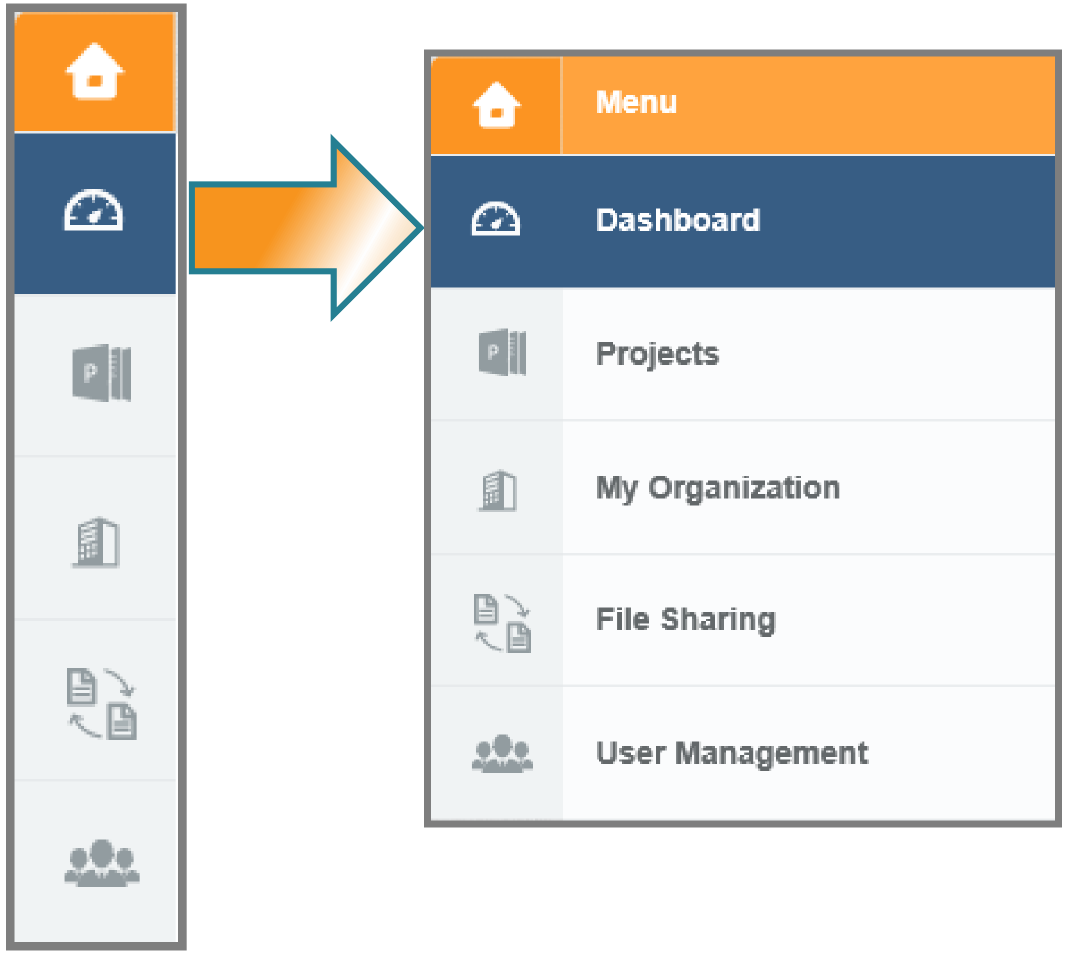
Dashboard Module

The Dashboard contains portlets that provide an overview of your sourcing activities and gives you access to them.

Access Dashboard

The Dashboard module can be accessed from the Supplier Home page, or by clicking the **Home** icon on the Navigation Menu.

Access the Navigation Menu



Access the Navigation Menu

- The navigation menu is located on the left side of each page.
- It allows you to move quickly from one module to another.
- To do so, click on a module to expand the menu and then select a link, to be directed to the section you want to access.

Access My Organization

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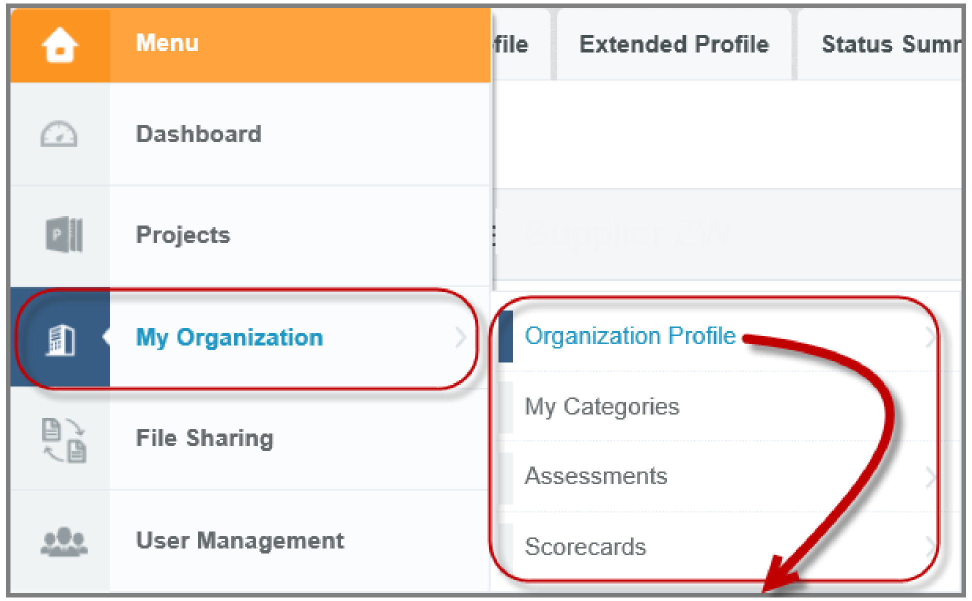
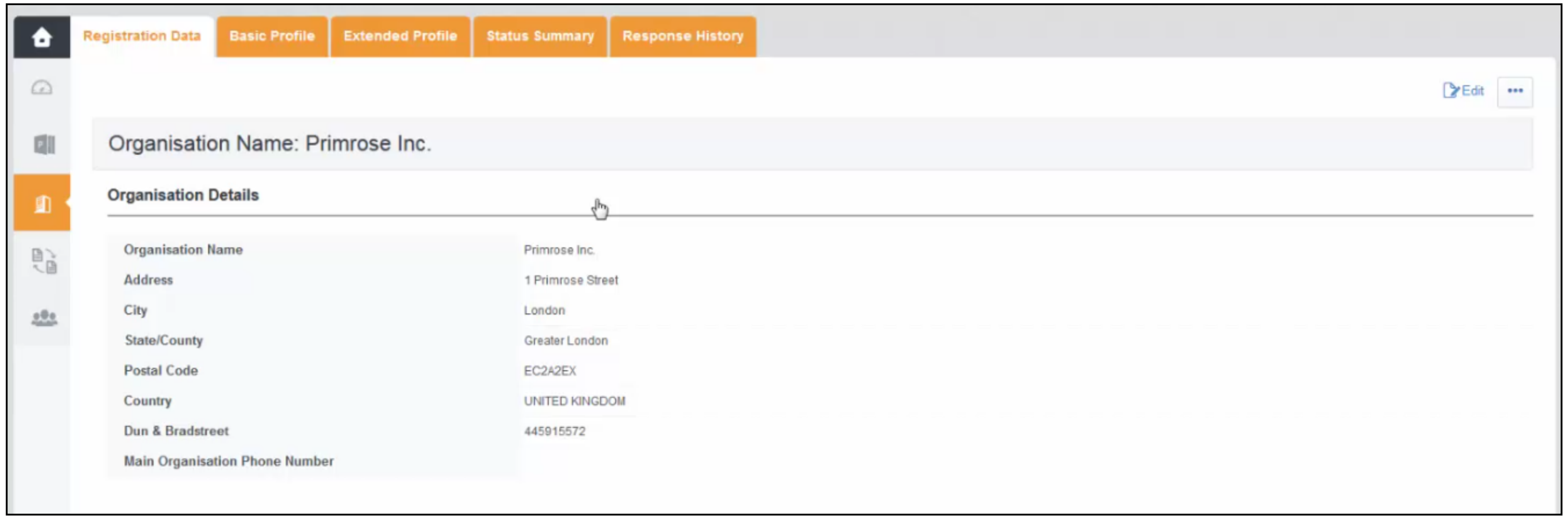




My Organization Module

In this module, you can view and manage your Registration data, Profile Forms, Category Classifications, Assessments and Scorecards.

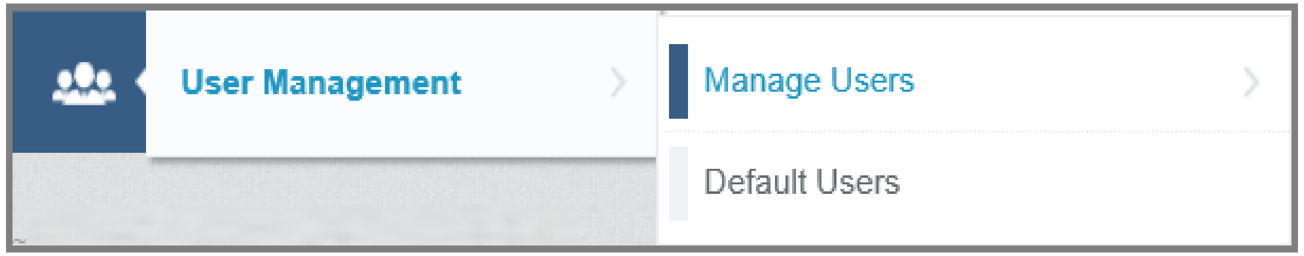
Access My Organization

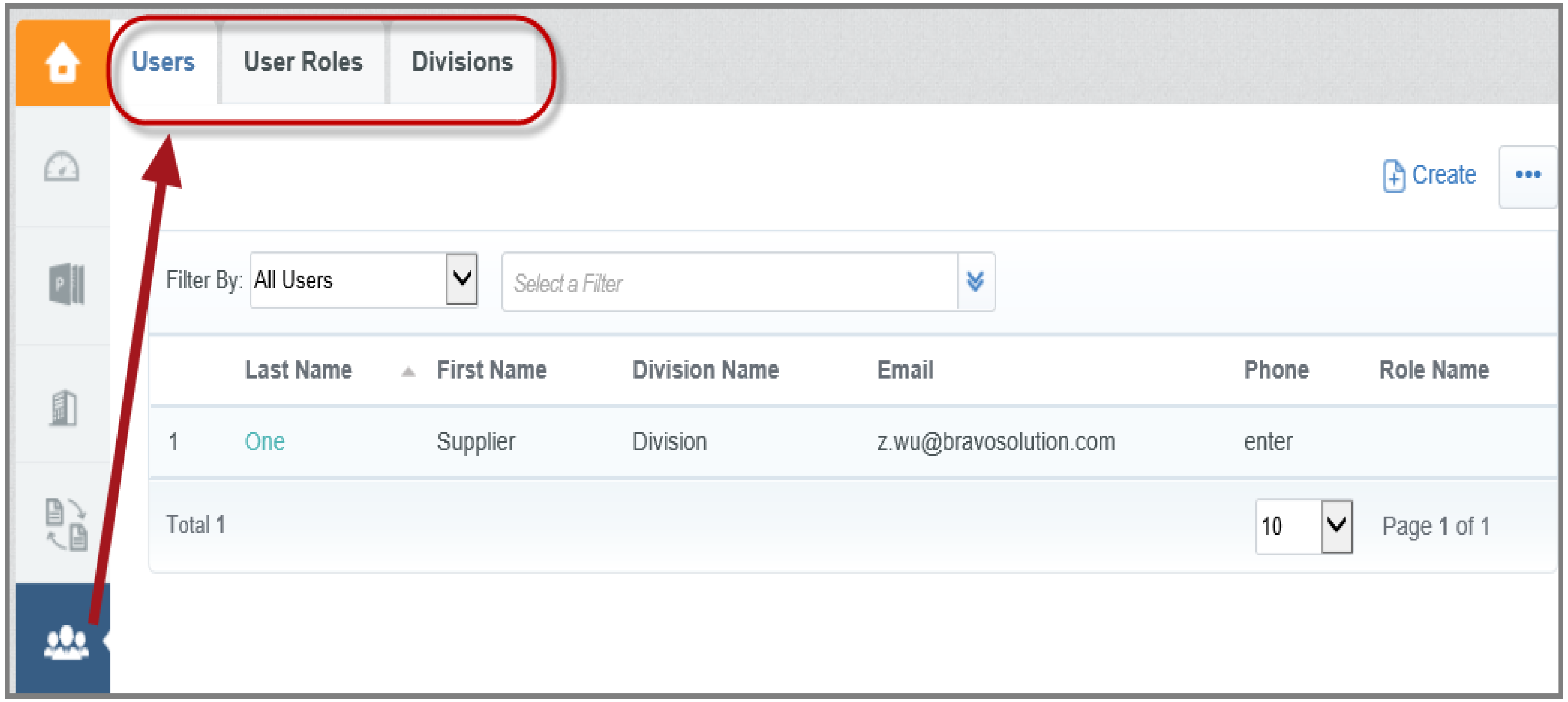
The module can be accessed from the Navigation Menu or the Supplier Home page.

1. Click **Edit** to update information.
2. Once the information is complete, click **Save**.

Note: Some Sourcing portals will not contain Extended Profile forms, Assessments or Scorecards.

Access User Management





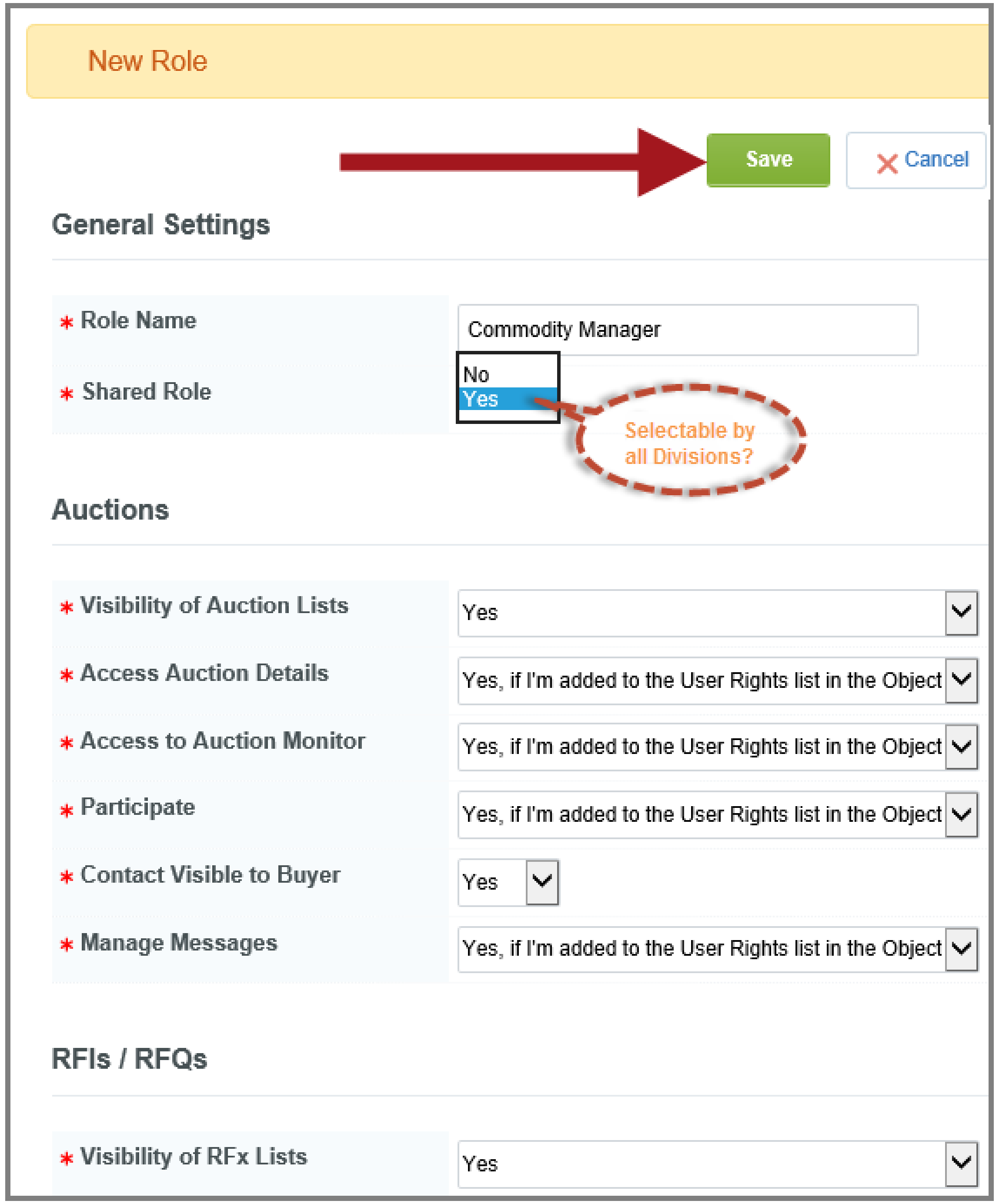
User Management Module

This module is available to users who are given the rights to manage users, roles and divisions within your organization.

Access User Organization

You can access the module from the Supplier Home page, or the Navigation Menu.

Create User Roles



User Roles

Allow you to define a specific set of user rights to assign to users in your organisation. The rights for each user account can still be manually revised after the role assignment.

Create User Role

1. Select **User Management, Manage Users, User Roles** from the Navigation Menu.
2. Click '**Create**' to turn the page into edit mode.
3. Give the User Role a name. It has be unique. Decide whether if it's a shared role that is visible and selectable by all divisions.
4. Amend user rights.
5. Once complete, click '**Save**' to create the new User Role.

Create New Users

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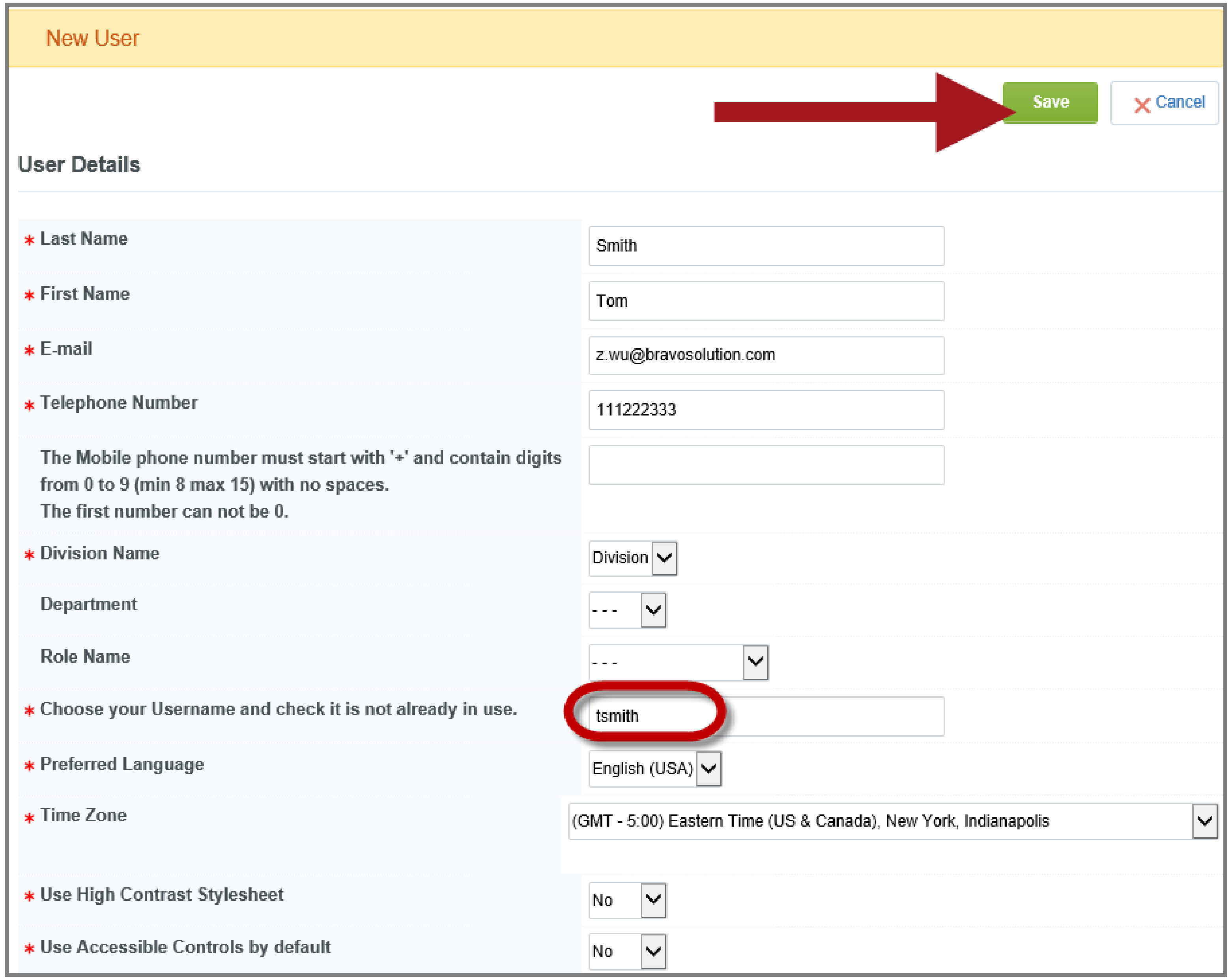

Create New User Accounts

1. Select **User Management, Manage Users, Users** from the Navigation menu.
2. Click ‘**Create**’ and enter the details for the new account.
3. Complete all mandatory fields and choose a username that will be memorable to the new user, e.g. a combo of first initial and last name.
4. It is recommended that you use a similar naming convention for all usernames.
5. Click **Save** to create the new user account.

Note:

If User Roles were not created, you will need to assign user rights.

By default, new users are not assigned any rights.

Access Projects and Sourcing Activities

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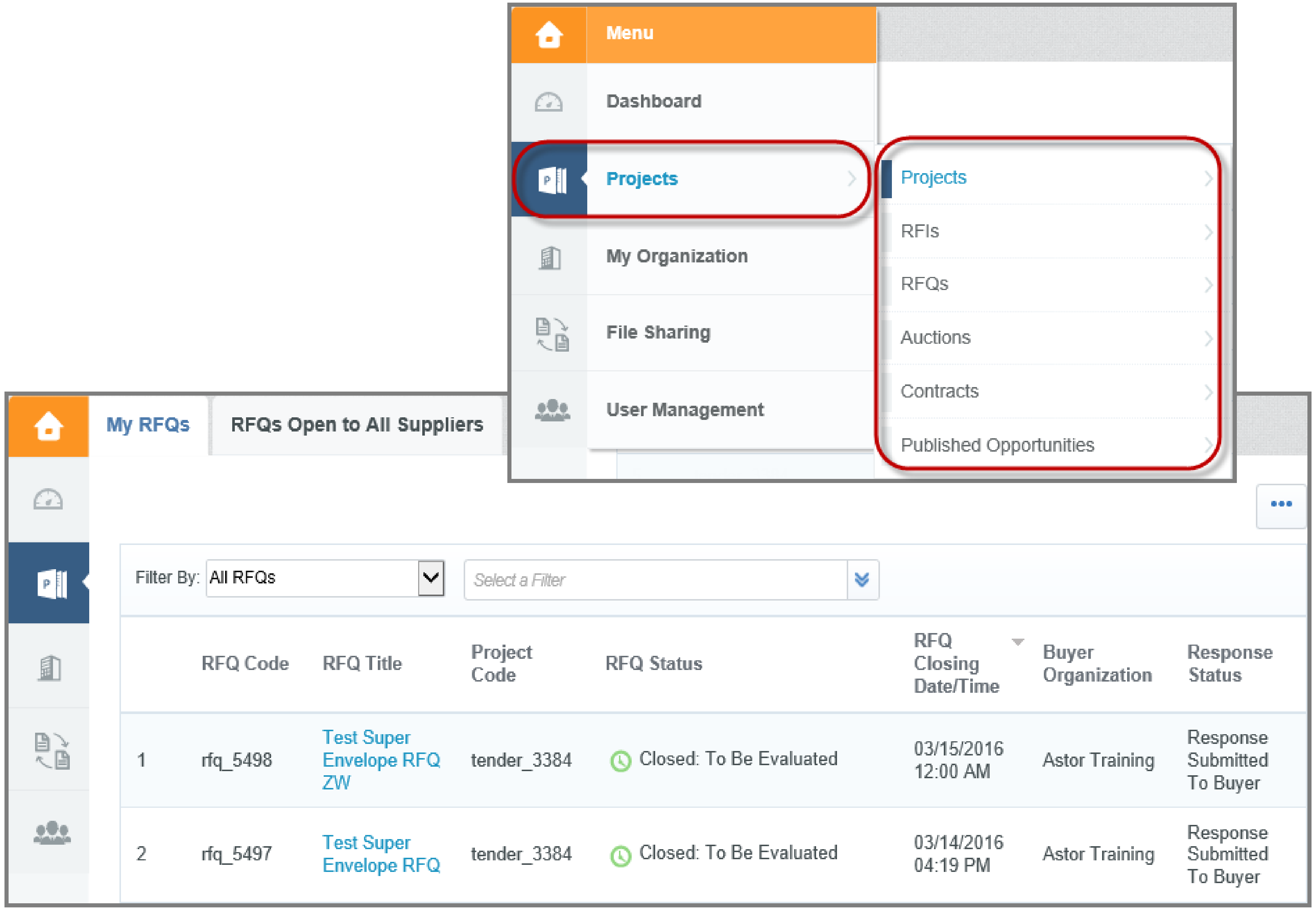

Projects Module

Projects are containers for sourcing events such as RFIs/RFQs, Auctions and Contracts.

Access Projects

You can access Projects and sourcing events via the Navigation Menu, Supplier Home page, or the Quick Links on the Dashboard.

Get Help – Global Customer Care

Need help with registration, navigation, or technical issues?

Please send an email to the BravoSolution Helpdesk at:

Help@bravosolution.co.uk

+44 203 3496600