

Supplier Registration & Navigation Guide



Supplier Training

Presented By:

BravoSolution Education Services



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

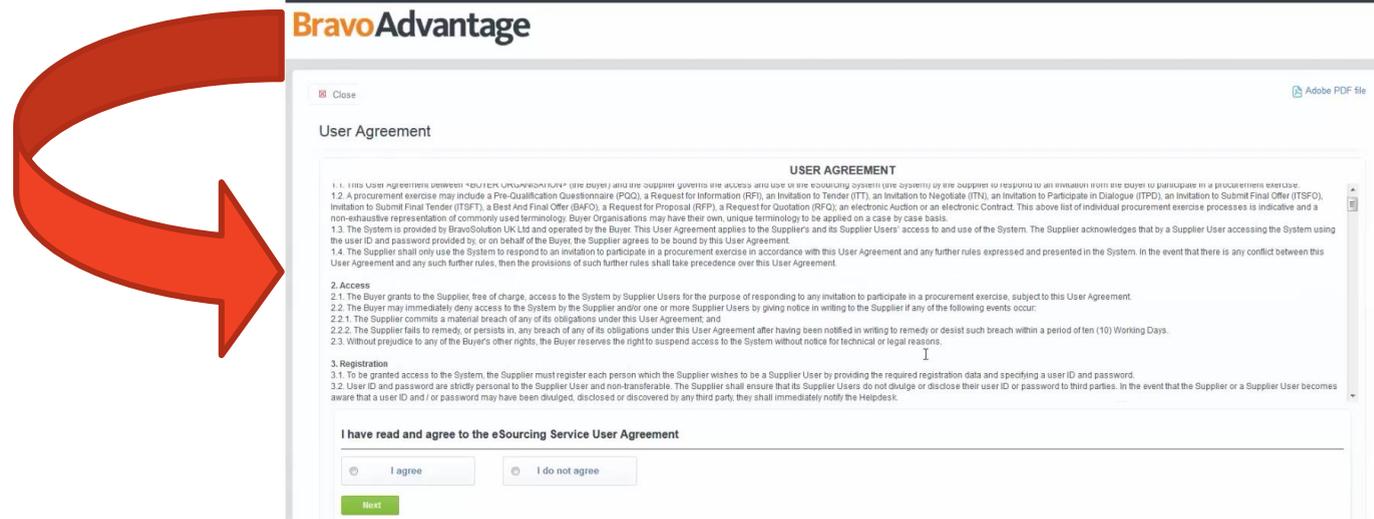
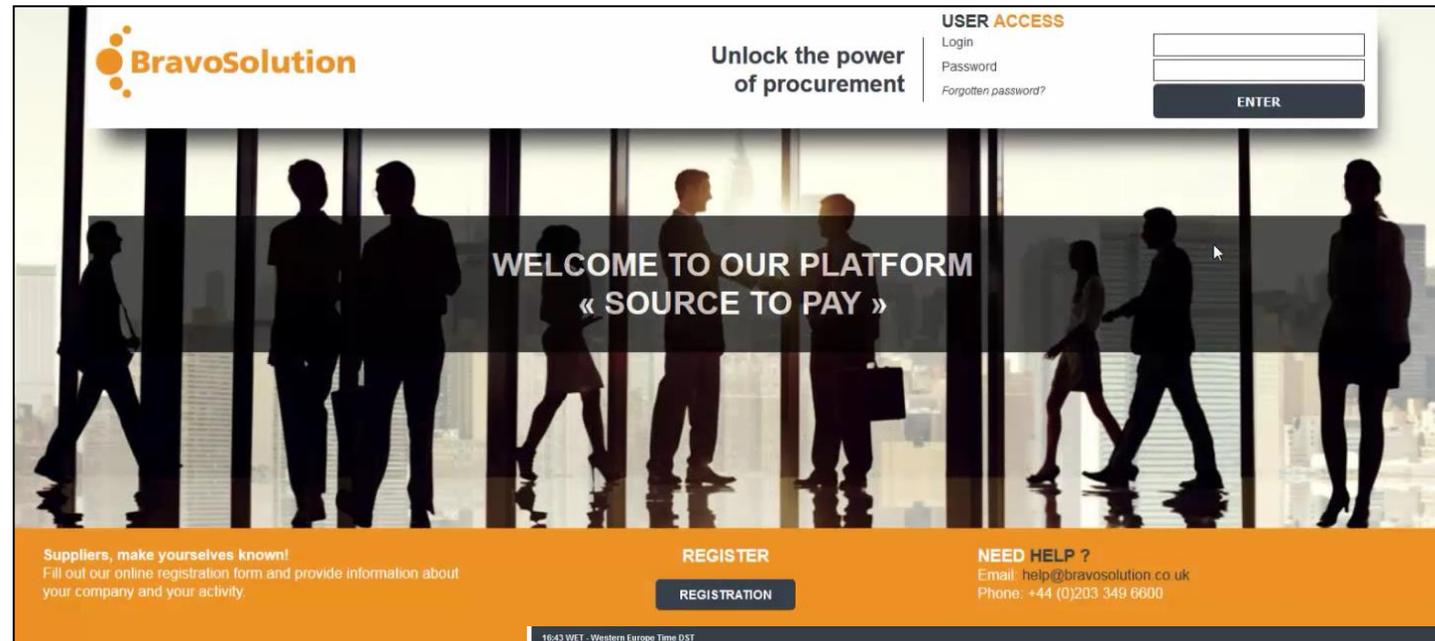
Please keep in mind that this is a generic guide to assist in registering on the eSourcing platform powered by BravoSolution. It is not specific to any project, contract or buying organization!

Register as Supplier



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



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**.

The screenshot displays a registration form with two main sections: 'Organisation Details' and 'User Details'. The 'Organisation Details' section includes fields for Organisation Name (filled with 'Primrose'), Address, City, State/Country (dropdown), Postal Code, Country (dropdown, filled with 'UNITED KINGDOM'), Dun & Bradstreet, and Main Organisation Phone Number. The 'User Details' section includes fields for First Name (filled with 'Jane'), Last Name (filled with 'Smith'), Email Address (filled with 'janesm'), Username, Preferred language for use in system interface (dropdown), and Time Zone (dropdown). A 'Save' button is visible at the top right of the form.

* 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.

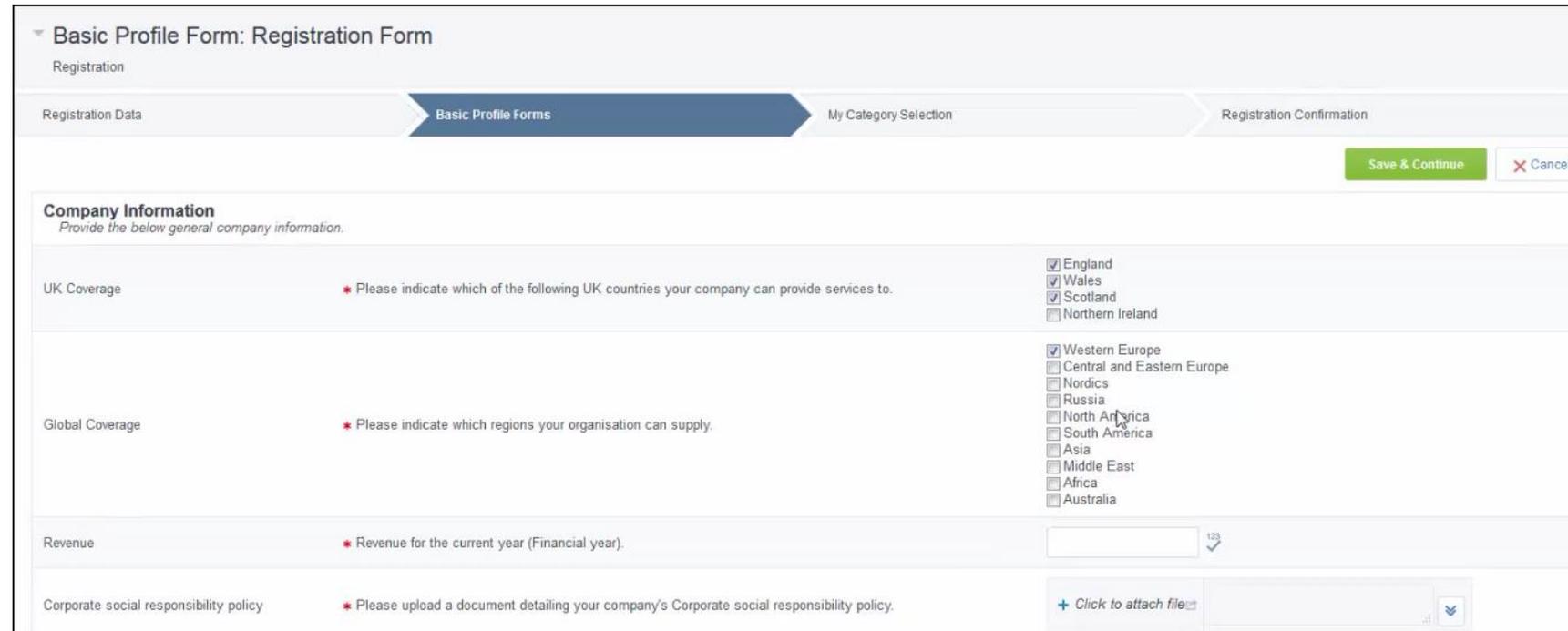
Complete Basic Profile Form

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**.

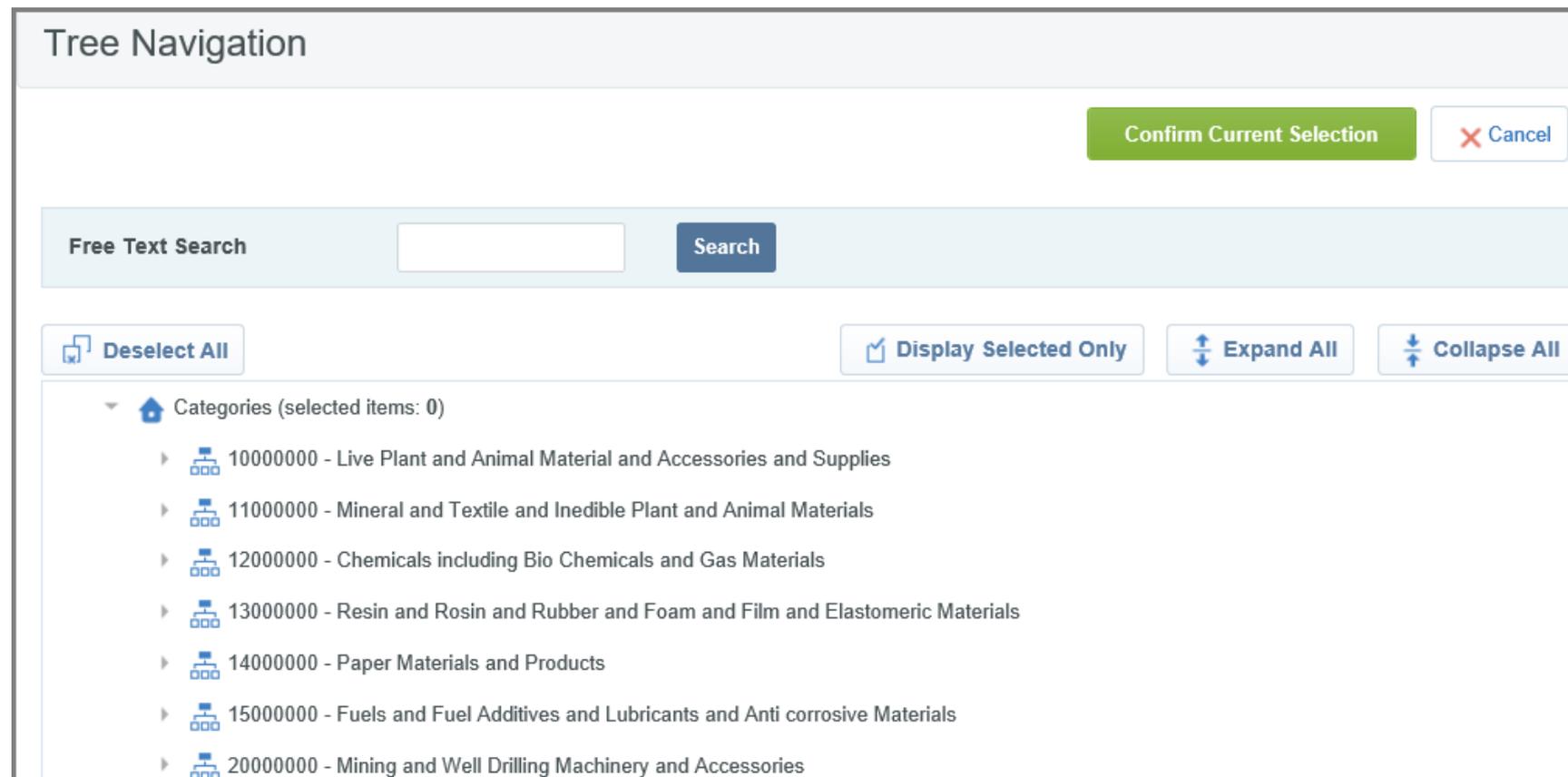
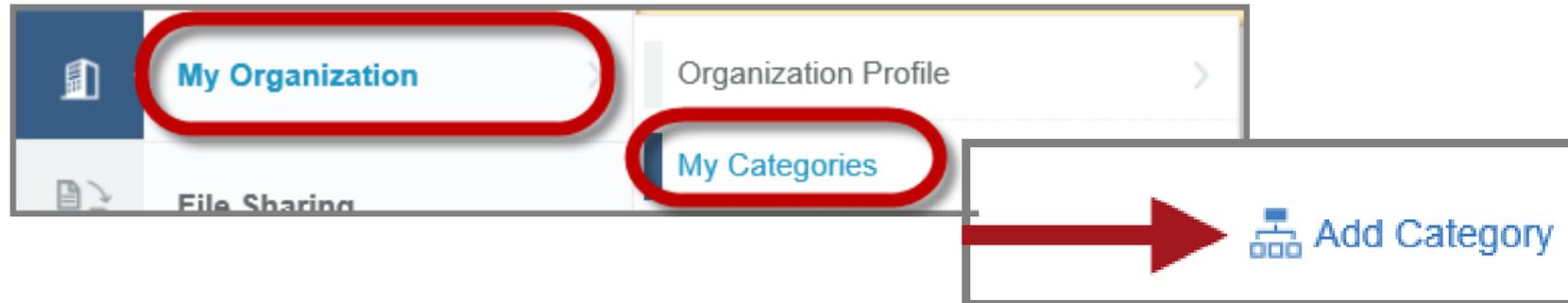


The screenshot shows a web form titled "Basic Profile Form: Registration Form". At the top, there is a progress bar with four steps: "Registration Data", "Basic Profile Forms" (which is the current step and highlighted in blue), "My Category Selection", and "Registration Confirmation". Below the progress bar, there are two buttons: "Save & Continue" (green) and "Cancel" (red with an X).

The main content area is titled "Company Information" and includes the instruction "Provide the below general company information." It contains four sections:

- UK Coverage:** A mandatory field (indicated by a red asterisk) asking to indicate which of the following UK countries the company can provide services to. The options are: England, Wales, Scotland, and Northern Ireland.
- Global Coverage:** A mandatory field asking to indicate which regions the organisation can supply. The options are: Western Europe, Central and Eastern Europe, Nordics, Russia, North America, South America, Asia, Middle East, Africa, and Australia.
- Revenue:** A mandatory field asking for the revenue for the current year (Financial year). It features a text input box and a dropdown menu with "123" selected.
- Corporate social responsibility policy:** A mandatory field asking to upload a document detailing the company's CSR policy. It includes a "+ Click to attach file" button and a file upload area.

Select Categories of Supply



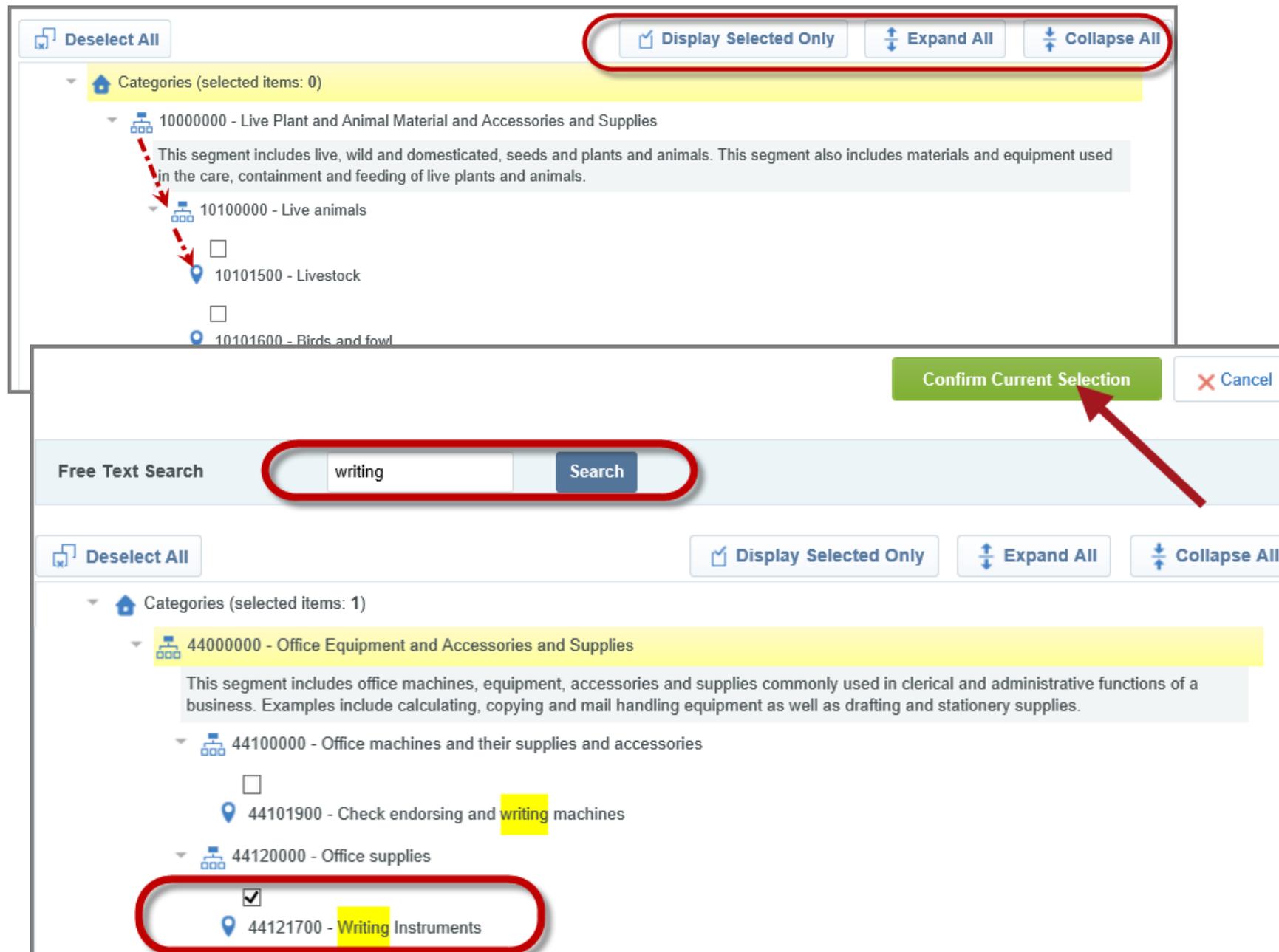
Categories

- 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.



The screenshot displays the BravoSolution Category Classification interface. At the top, there are buttons for 'Deselect All', 'Display Selected Only', 'Expand All', and 'Collapse All'. The main area shows a tree view of categories. The first category is '10000000 - Live Plant and Animal Material and Accessories and Supplies', which is expanded to show subcategories: '10100000 - Live animals', '10101500 - Livestock', and '10101600 - Birds and fowl'. A red dashed arrow points to the '10101500 - Livestock' category. Below this, there is a 'Free Text Search' field containing the text 'writing' and a 'Search' button. A red circle highlights the search field and button. To the right of the search field, there is a green button labeled 'Confirm Current Selection' and a white button labeled 'Cancel'. A red arrow points to the 'Confirm Current Selection' button. Below the search field, there are buttons for 'Deselect All', 'Display Selected Only', 'Expand All', and 'Collapse All'. The main area shows a tree view of categories. The first category is '44000000 - Office Equipment and Accessories and Supplies', which is expanded to show subcategories: '44100000 - Office machines and their supplies and accessories', '44101900 - Check endorsing and writing machines', and '44120000 - Office supplies'. The '44120000 - Office supplies' category is expanded to show the subcategory '44121700 - Writing Instruments', which is selected with a checkmark. A red circle highlights the '44121700 - Writing Instruments' category.

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



Categories

- 14000000 - Paper Materials and Products
 - This segment includes paper used for commercial printing, forms, envelopes, reprographics, and tablets as well as value-added papers which feature special surface treatments, color, chemicals, or fiber content that meet specific needs.
 - 14110000 - Paper products
 - 14111500 - Printing and writing paper
 - 14111600 - Novelty paper
 - 14111700 - Personal paper products
 - 14111800 - Business use papers

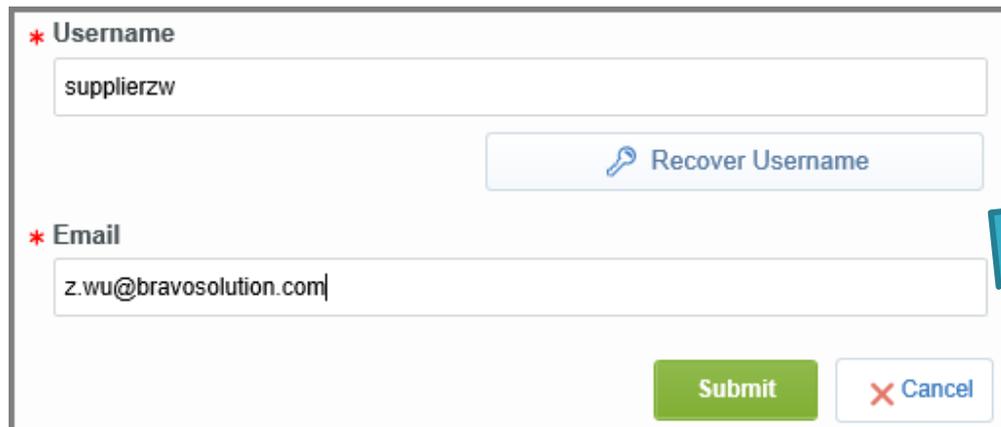
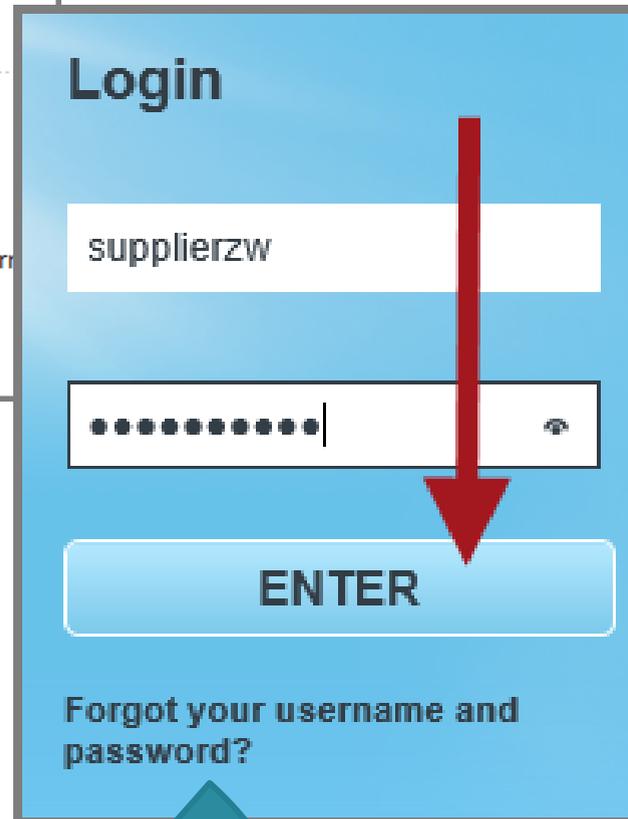
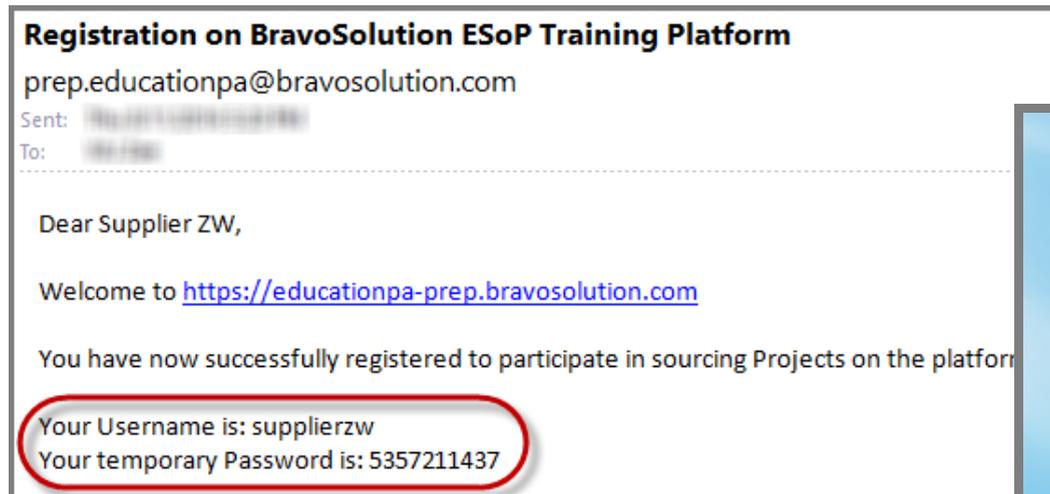
Published Opportunity

Project Details

Project Code tender_4224	Project Title Supply and Delivery of Plain Paper
Project Reference	Project with Multiple Lots No
Project Type Goods	Project Categories 14111500 - Printing and writing paper 14111800 - Business use papers 14122200 - Specialty industrial use papers

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

- 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.

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>

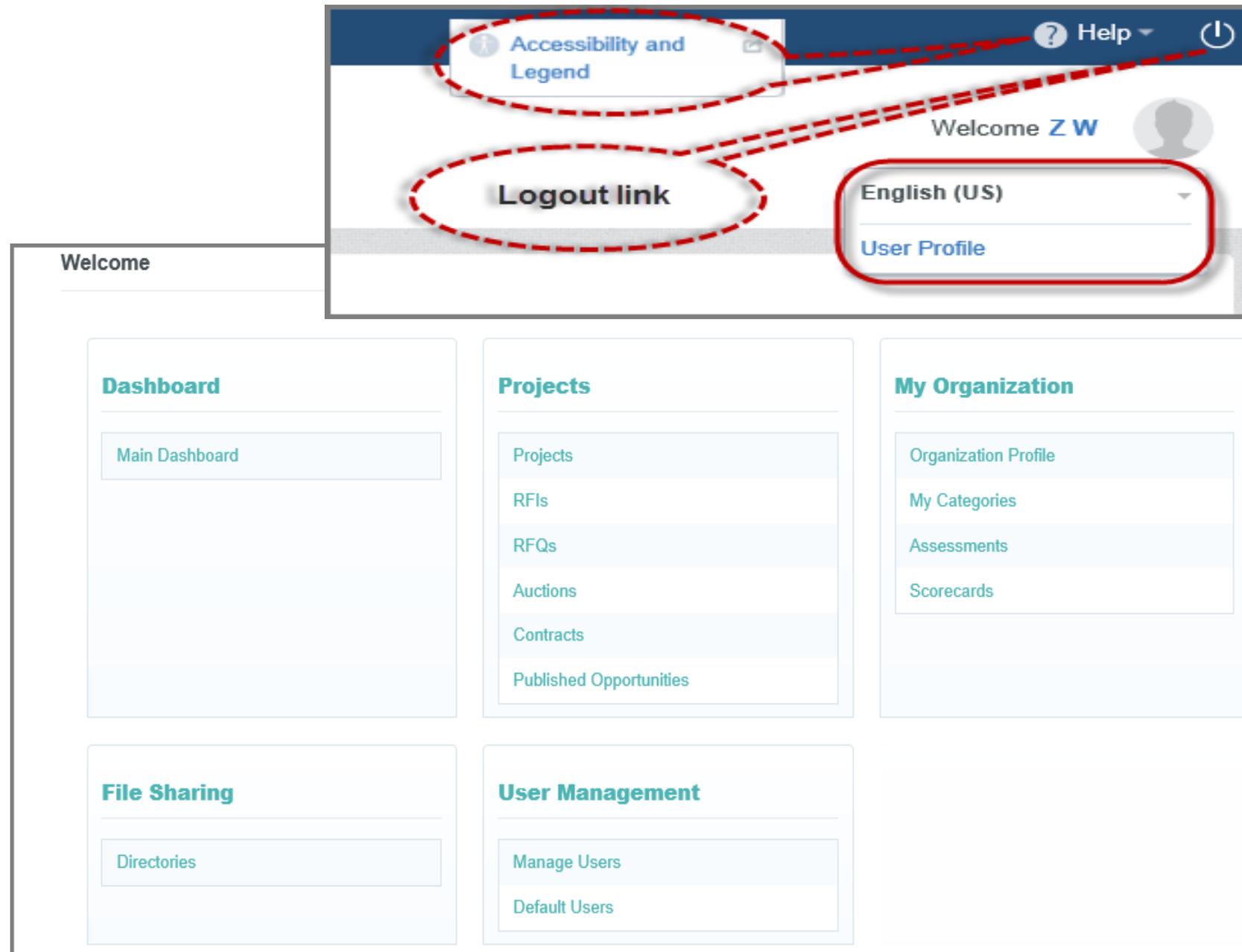
After you have used this link you can delete this email as the link can be used only once.

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



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

Universal Links

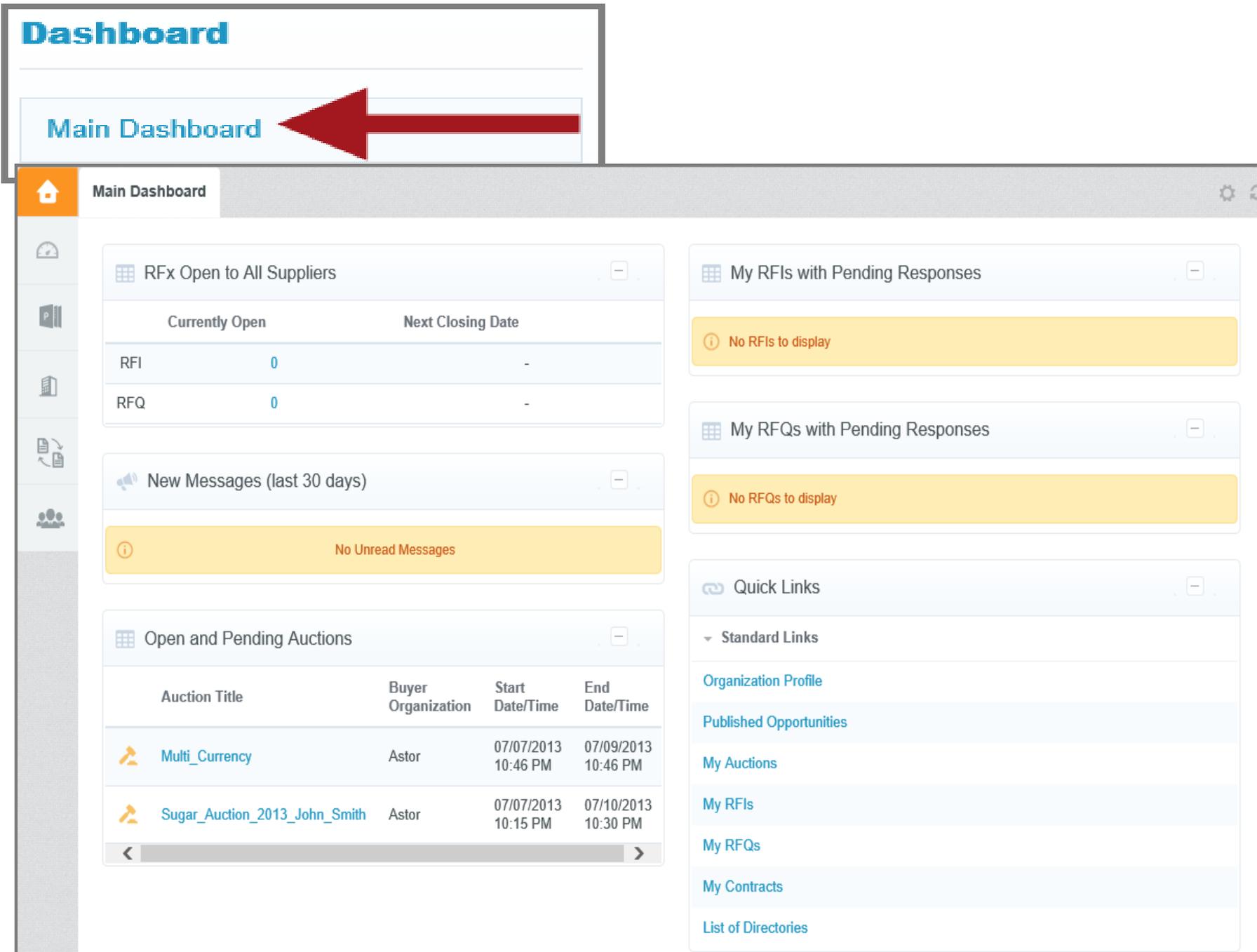
- On the upper right corner of the page, you can find links to Logout, and to view Accessibility guidance.
- You can also find links to access your User Profile to change your language, user details and/or password.

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

Main Dashboard ←

Main Dashboard

RFX Open to All Suppliers

	Currently Open	Next Closing Date
RFI	0	-
RFQ	0	-

My RFIs with Pending Responses

No RFIs to display

My RFQs with Pending Responses

No RFQs to display

New Messages (last 30 days)

No Unread Messages

Open and Pending Auctions

Auction Title	Buyer Organization	Start Date/Time	End Date/Time
Multi_Currency	Astor	07/07/2013 10:46 PM	07/09/2013 10:46 PM
Sugar_Auction_2013_John_Smith	Astor	07/07/2013 10:15 PM	07/10/2013 10:30 PM

Quick Links

Standard Links

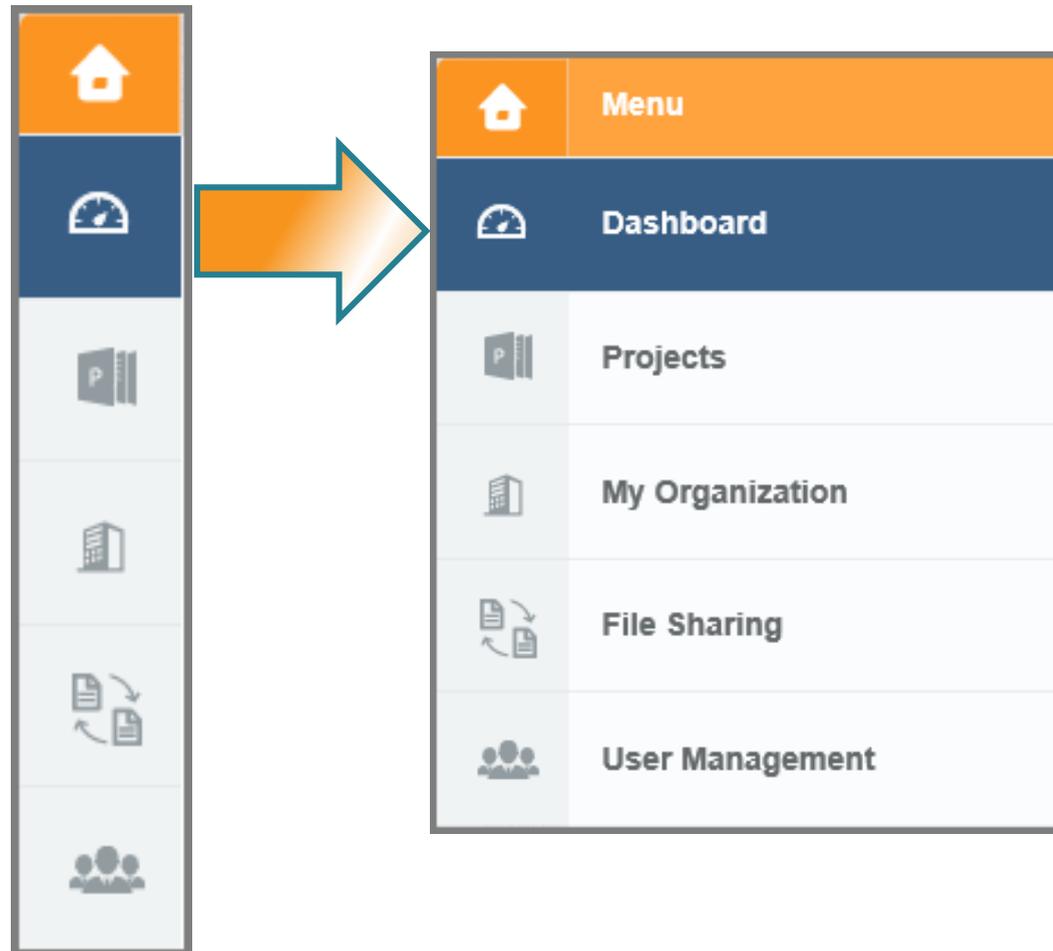
- [Organization Profile](#)
- [Published Opportunities](#)
- [My Auctions](#)
- [My RFIs](#)
- [My RFQs](#)
- [My Contracts](#)
- [List of Directories](#)

Dashboard Module

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

Access Dashboard

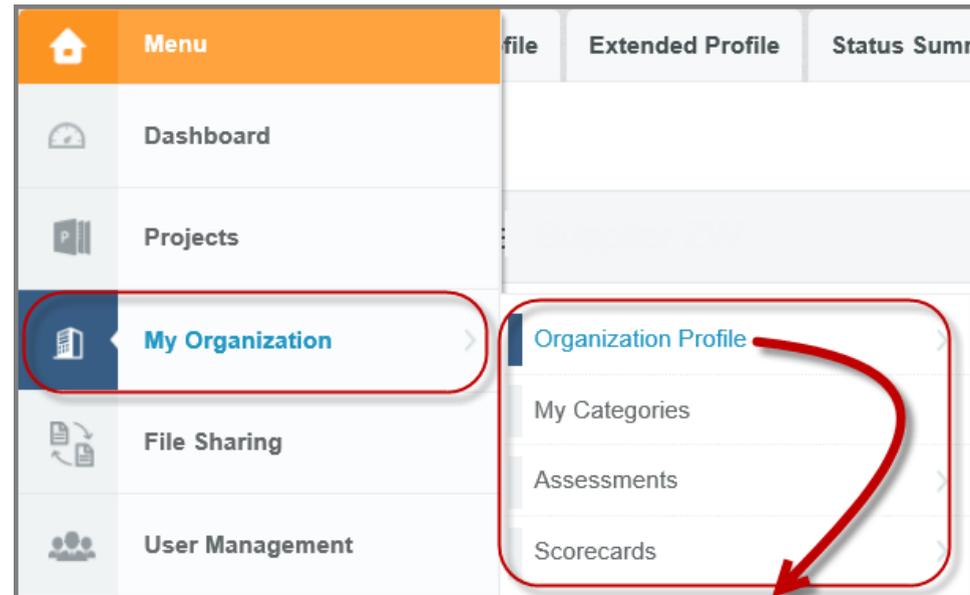
The Dashboard module can be accessed from the Supplier Home page, or by clicking the **Home** icon on the Navigation Menu.



Access the Navigation Menu

- 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



My Organization Module

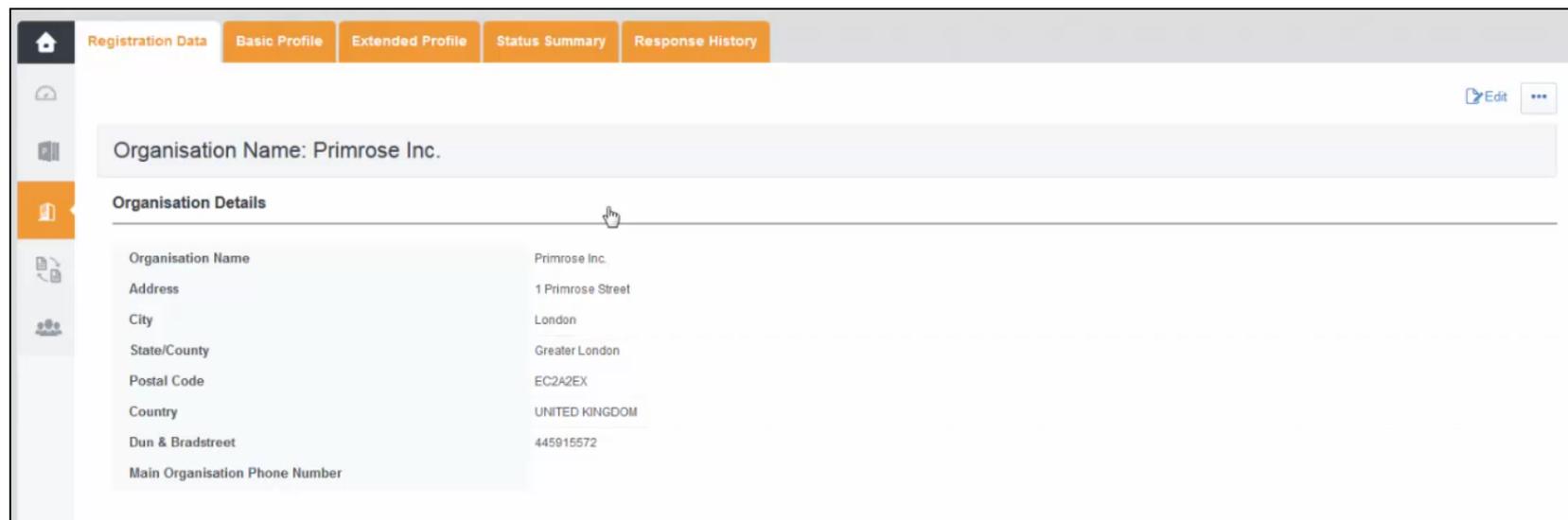
In this module, you can view and manage your Registration data, Profile Forms, Category Classifications, Assessments and Scorecards.

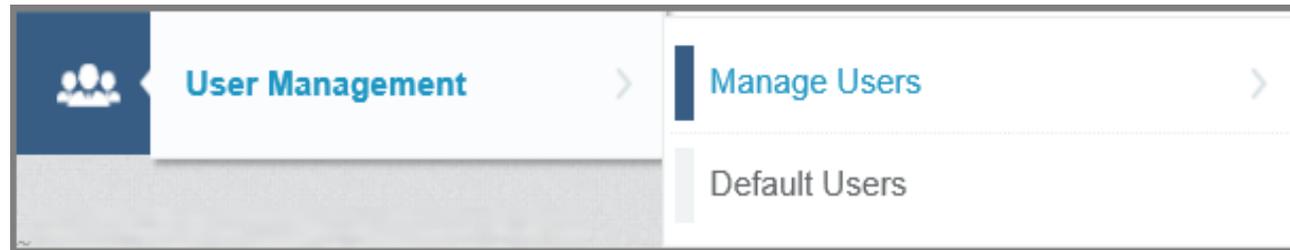
Access My Organization

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.



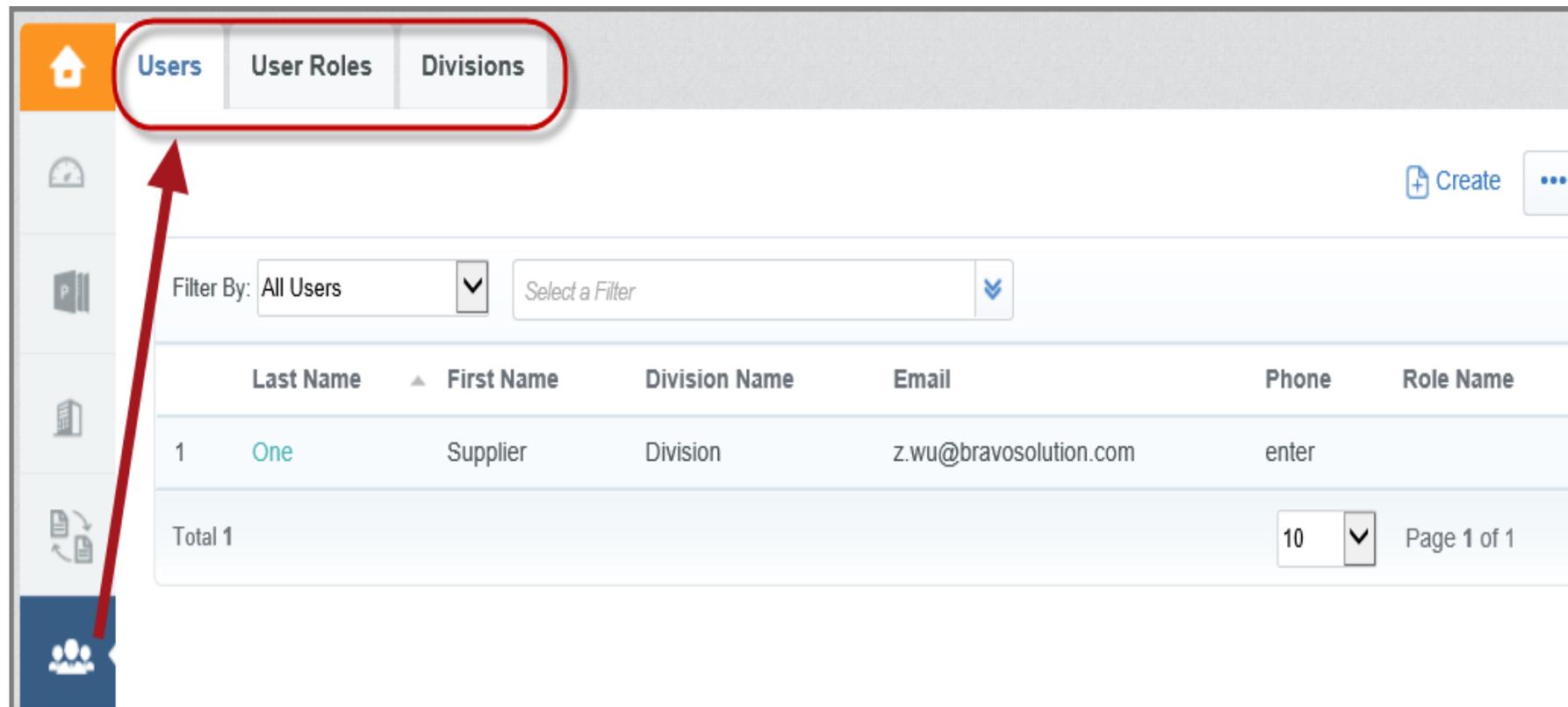


User Management Module

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

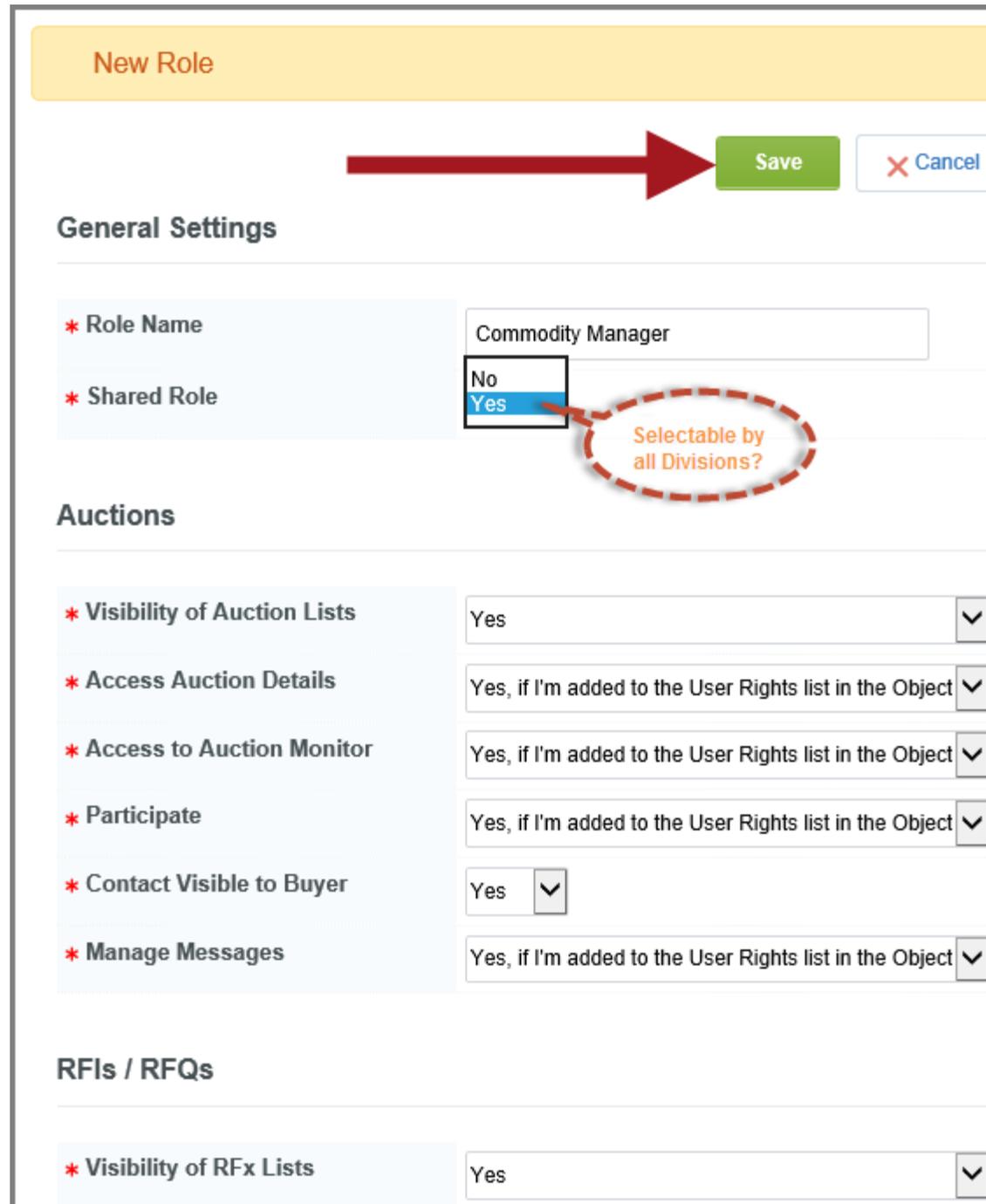
Access User Organization

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



A screenshot of the User Management interface. At the top, there are three tabs: "Users", "User Roles", and "Divisions". The "Users" tab is selected and highlighted with a red circle. A red arrow points from the "Users" tab to the main content area. The main content area includes a "Filter By:" dropdown menu set to "All Users", a "Create" button, and a table with columns: "Last Name", "First Name", "Division Name", "Email", "Phone", and "Role Name". The table contains one row with the following data: "1", "One", "Supplier", "Division", "z.wu@bravosolution.com", "enter". Below the table, it shows "Total 1", a page size dropdown set to "10", and "Page 1 of 1".

	Last Name	First Name	Division Name	Email	Phone	Role Name
1	One	Supplier	Division	z.wu@bravosolution.com	enter	



New Role

Save **Cancel**

General Settings

* Role Name: Commodity Manager

* Shared Role: **Yes** (Selectable by all Divisions?)

Auctions

* Visibility of Auction Lists: Yes

* Access Auction Details: Yes, if I'm added to the User Rights list in the Object

* Access to Auction Monitor: Yes, if I'm added to the User Rights list in the Object

* Participate: Yes, if I'm added to the User Rights list in the Object

* Contact Visible to Buyer: Yes

* Manage Messages: Yes, if I'm added to the User Rights list in the Object

RFIs / RFQs

* Visibility of RFx Lists: Yes

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.

New User



User Details

* Last Name

* First Name

* E-mail

* Telephone Number

The Mobile phone number must start with '+' and contain digits from 0 to 9 (min 8 max 15) with no spaces. The first number can not be 0.

* Division Name

Department

Role Name

* Choose your Username and check it is not already in use.

* Preferred Language

* Time Zone

* Use High Contrast Stylesheet

* Use Accessible Controls by default

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.

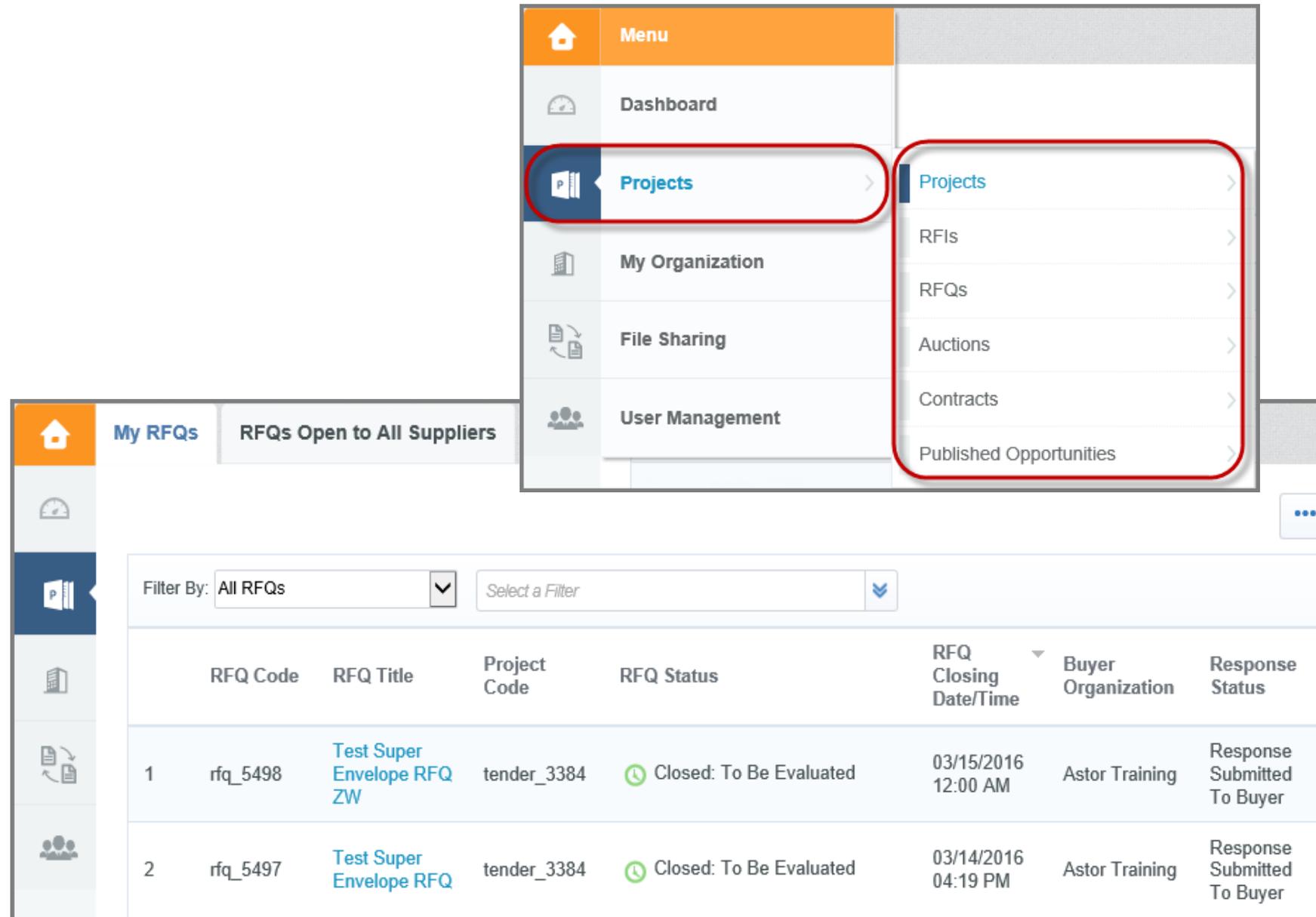
By default, new users are not assigned any rights.

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.



The screenshot displays the BravoSolution interface. At the top, a navigation menu is shown with a red circle around the 'Projects' item. A dropdown menu is open from 'Projects', listing 'Projects', 'RFIs', 'RFQs', 'Auctions', 'Contracts', and 'Published Opportunities'. Below the menu, the main content area shows a table of RFQs. The table has columns for RFQ Code, RFQ Title, Project Code, RFQ Status, RFQ Closing Date/Time, Buyer Organization, and Response Status. Two rows of data are visible, both for 'Test Super Envelope RFQ ZW' with status 'Closed: To Be Evaluated'.

	RFQ Code	RFQ Title	Project Code	RFQ Status	RFQ Closing Date/Time	Buyer Organization	Response Status
1	rfq_5498	Test Super Envelope RFQ ZW	tender_3384	Closed: To Be Evaluated	03/15/2016 12:00 AM	Astor Training	Response Submitted To Buyer
2	rfq_5497	Test Super Envelope RFQ	tender_3384	Closed: To Be Evaluated	03/14/2016 04:19 PM	Astor Training	Response Submitted To Buyer



**Need help with registration,
navigation, or technical issues?**

Please send an email to the
BravoSolution Helpdesk at:

Help@bravosolution.co.uk

+44 203 3496600