SMART by GEP®

Unified Procurement Platform

RFx User Manual

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Chapter 1: Introduction

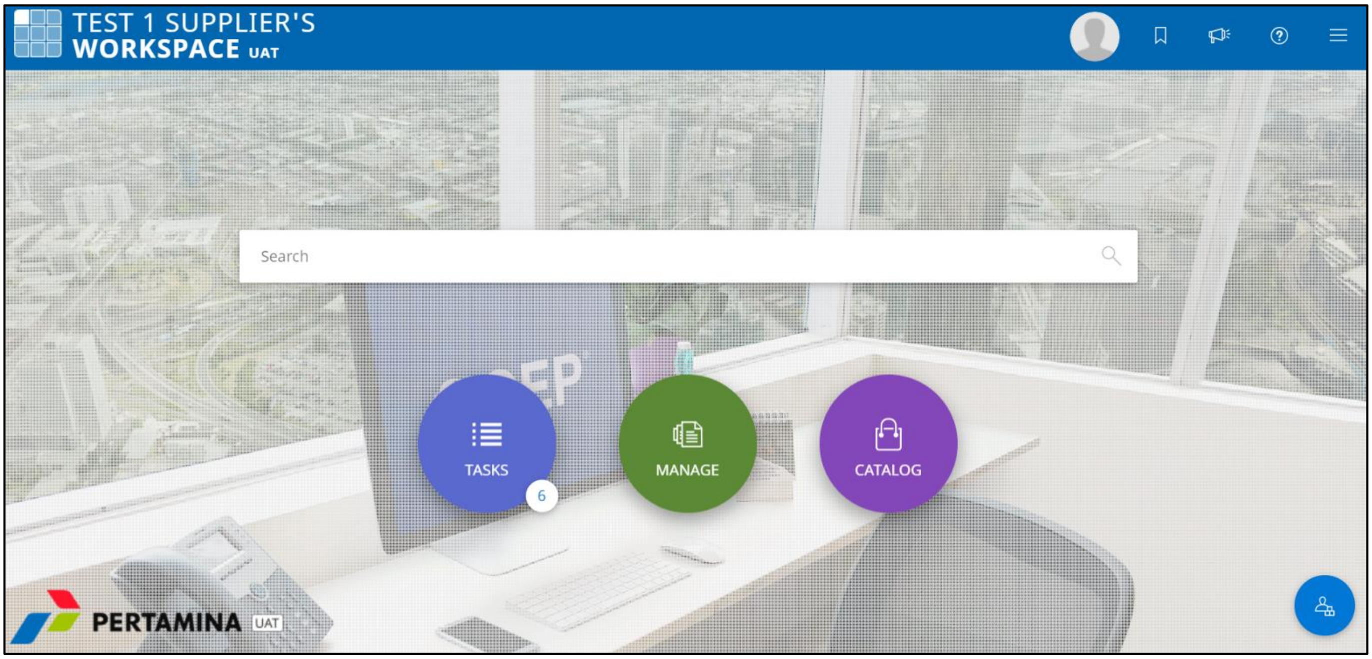
An RFx is a sourcing event that enables buyers to determine the suppliers' capability to supply a product or a service, and the price at which they can supply it.

The term RFx can refer to any of the following:

- Request for Information (RFI): An RFI is sent to new or current suppliers to confirm their ability or willingness to fulfill the organization's requirement.
- Request for Proposal (RFP): An RFP is sent to suppliers who are found capable of fulfilling the requirement. It asks for business proposals from the suppliers and may request for additional information regarding the product or service, or the processes followed by the supplier.
- Request for Quotation (RFQ): An RFQ invites qualifying suppliers to bid for the requirement and provide price quotes.

Chapter 2: Overview

On successful login, the Workspace home page is displayed as shown below:



On the Workspace home page, you can view all the RFx you have been invited for either under the Task section or the Manage section.

Under the Task section, the documents are categorized and displayed according to the status. You can search for and participate in the required RFx.

Under the Manage section, the documents are arranged according to the document types. Scroll through the list of cards to locate RFx, and on the RFx card, click the required RFx document.

Click Show All on the RFx card, to see a list of all the RFx that you have been invited for and the RFx that you have been a part of, earlier.

You can also search for an RFx using the search field on the Workspace home page.

Chapter 3: Viewing the RFx event

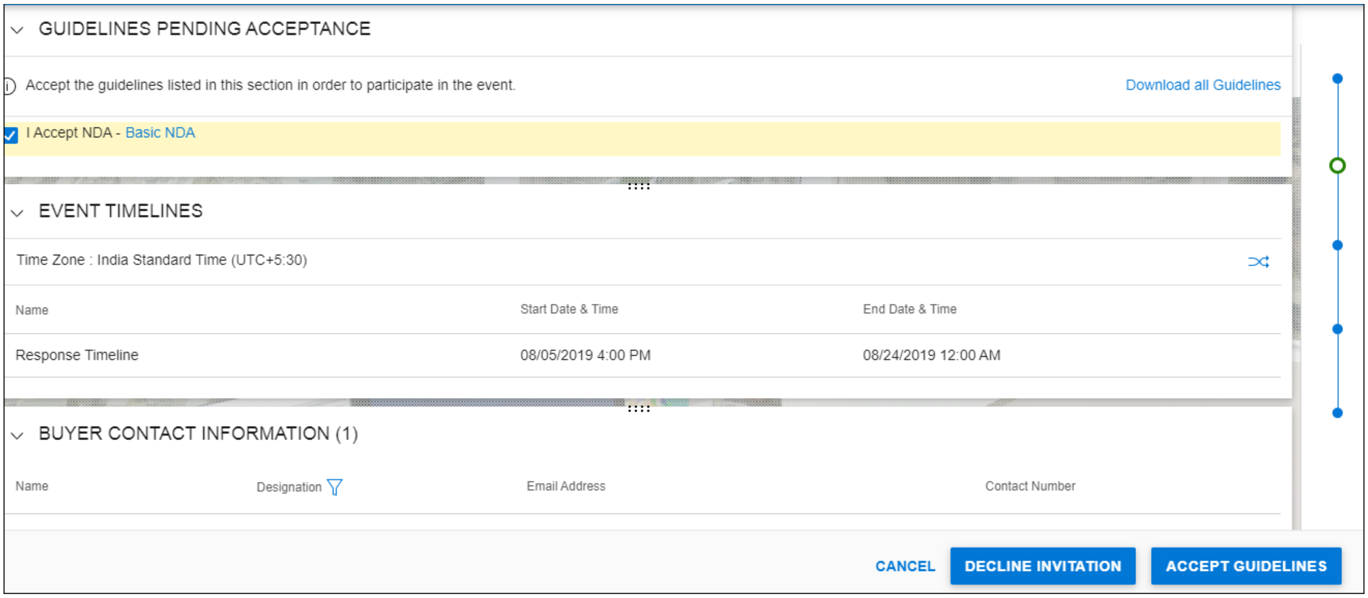
Once the buyer organization has published a sourcing RFx event and invited you to it, you can access a Sourcing RFx event from the Task or Manage section of the Workspace.

Following are the different statuses an RFx can have:

Status	Description
New	The event is yet to be accepted.
Guidelines Acknowledged	You have accepted the Guidelines.
Participation confirmed	You have accepted the invitation to participate in the event.
Response Submitted	You have submitted your responses for the event.
Event Closed	Response timeline has ended and the you have not submitted responses or taken any action from the menu.

3.1 Guideline Acknowledgement

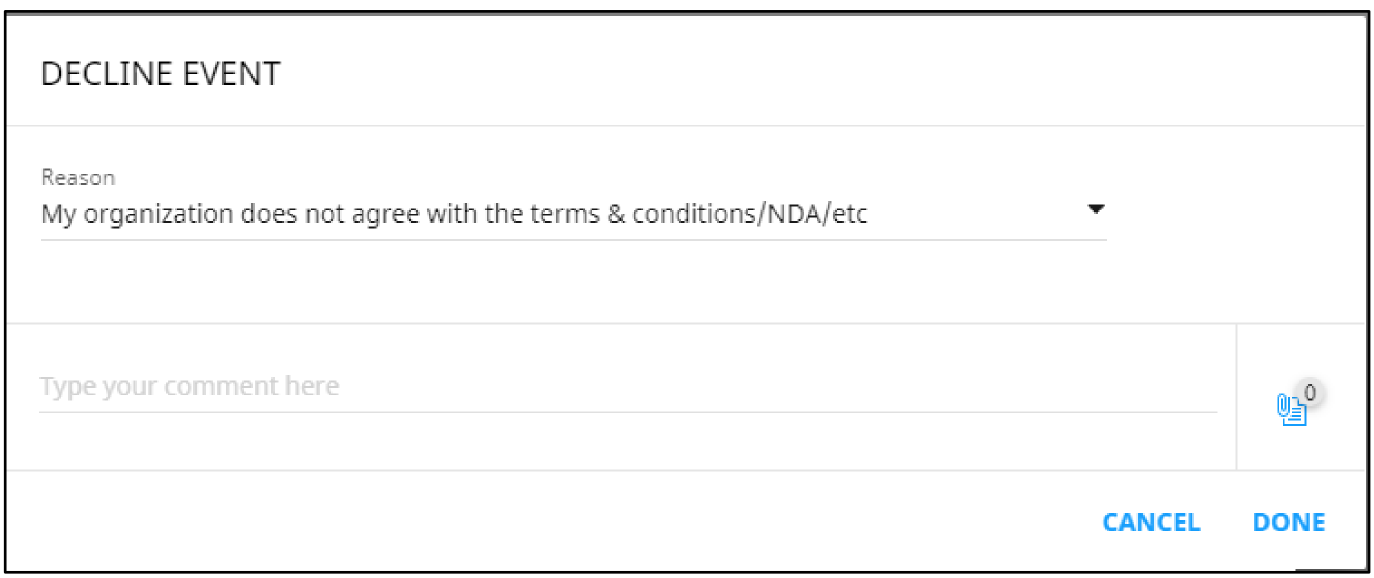
Once you follow the link provided in the email notification or after you click to open the event from the Workspace home page, the RFx page is displayed. Based on the configuration selected by the buyer, initially you can only see Guideline with an acknowledgement section. It is only after you accept the Guideline, that you can access the rest of the RFx event.

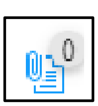


If you do not want to participate in the RFx event, you can decline invitation.

To decline invitation:

1) Click **Decline invitation**.
2) Click **Yes** on the following confirmation pop-up.
   The following Decline Event popup is displayed:



3) Select an appropriate reason from the drop-down. You can mention your comments in the respective comments field.
4) Click the  icon to upload any attachments.

5) Click **Done**.

6) Click **Ok** on the following success pop-up.

3.2 Viewing an RFx

Whenever there is a new invitation for an event from the buyer, that new event is displayed in **Tasks** section of Workspace with status New.

The Event disappears from **Tasks** section as soon as you submit the responses; event completes or decline participation.

On the RFx page, the timer section, on the upper right corner, depicts detailed information about event opening or closing, in days and time. On first access, an RFx page displayed is as shown below:

Note

On first access to the RFx page, you can see the Guidelines Acceptance section in the top. Only this section is active initially and you are required to read the guideline and other documents and accept it to gain access to the remaining sections in the RFx event.

Chapter 4: Responding to an RFx

An RFx page has the following sections:

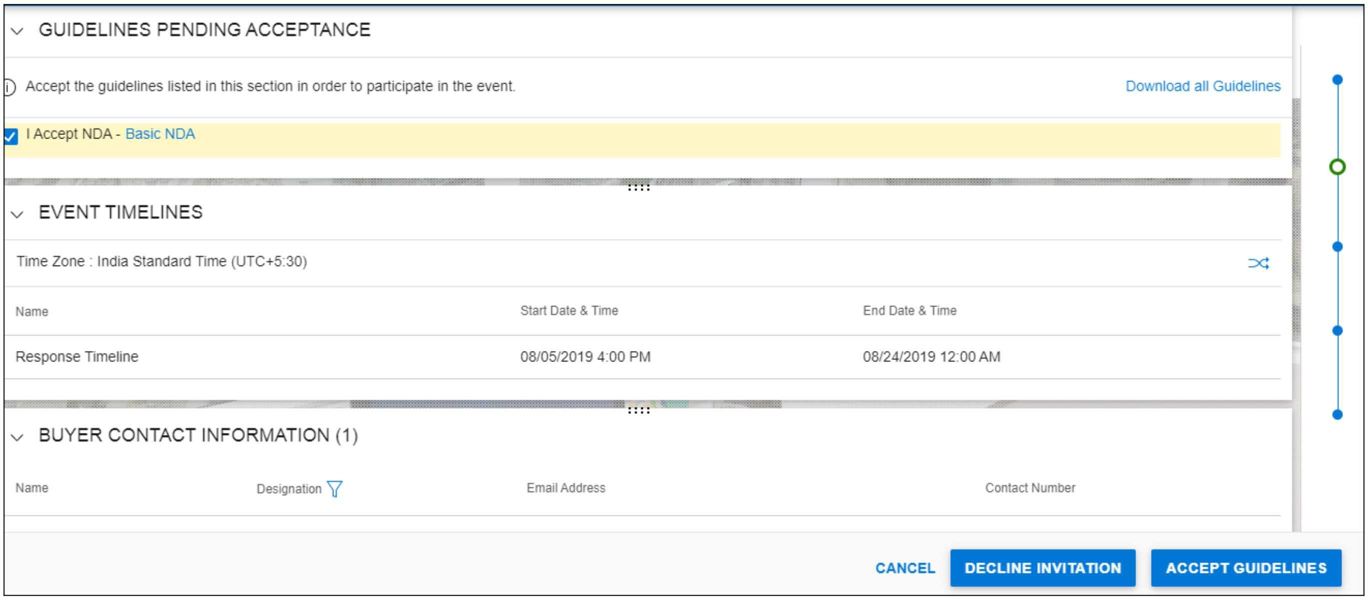
- Guidelines Pending Acceptance
- Basic Details
- Event Timelines
- Questionnaire
- Contract Terms
- Price sheet
- Attachments
- Team members

4.1 Accepting the Guidelines

Based on the configuration selected by the buyer, initially you can only see an Acceptance section. It is only after you accept the Guideline, that you can access the rest of the RFx event.

To accept the Guideline,

1) Click the **Guideline** name to read through the Guideline/NDA and then accept the Guideline. Select the **I Accept Guideline** checkbox.

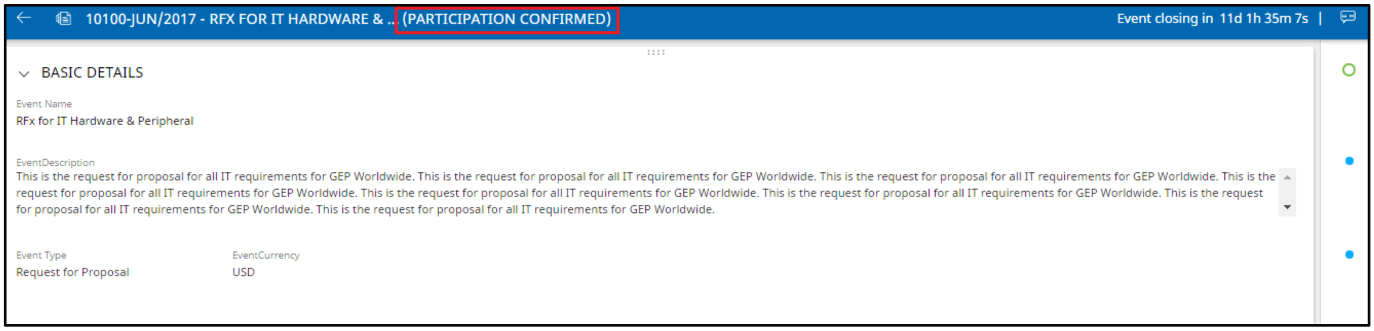


Once you accept the NDA/Guideline, the status of the event changes to **Guidelines Acknowledged.**

2) Then, click the **My organization wishes to participate in this event** checkbox at the bottom and then, click the **Submit** button at the bottom right corner.

3) Click **Ok** on the subsequent success pop-up.

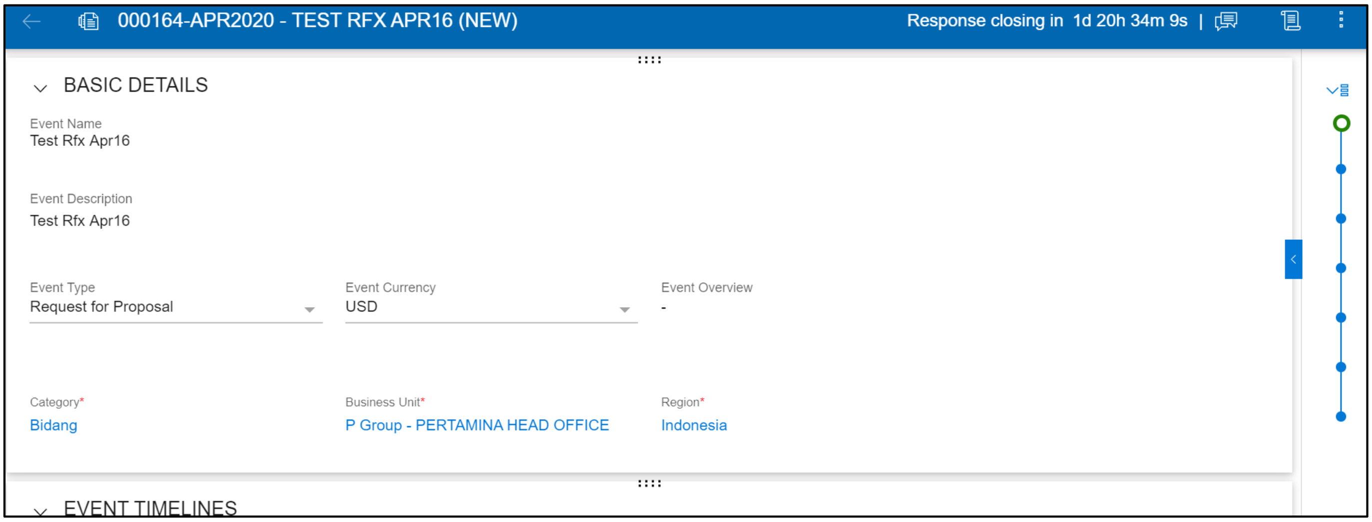
Once you submit the acceptance, the status of the event changes to **Participation confirmed** and the rest of the sections become active.



4.2 Basic details

The Basic Details section displays the basic information regarding the RFx event such as the event name, description, type, currency, category, business unit and region.

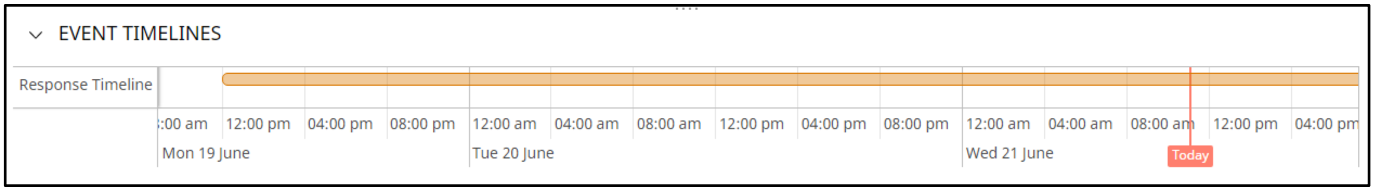
At the top-right corner, is the timer that indicates the time for the event to open and the closure time of response.



4.3 Event Timelines

The Event Timelines section displays the response timeline set by the buyer.

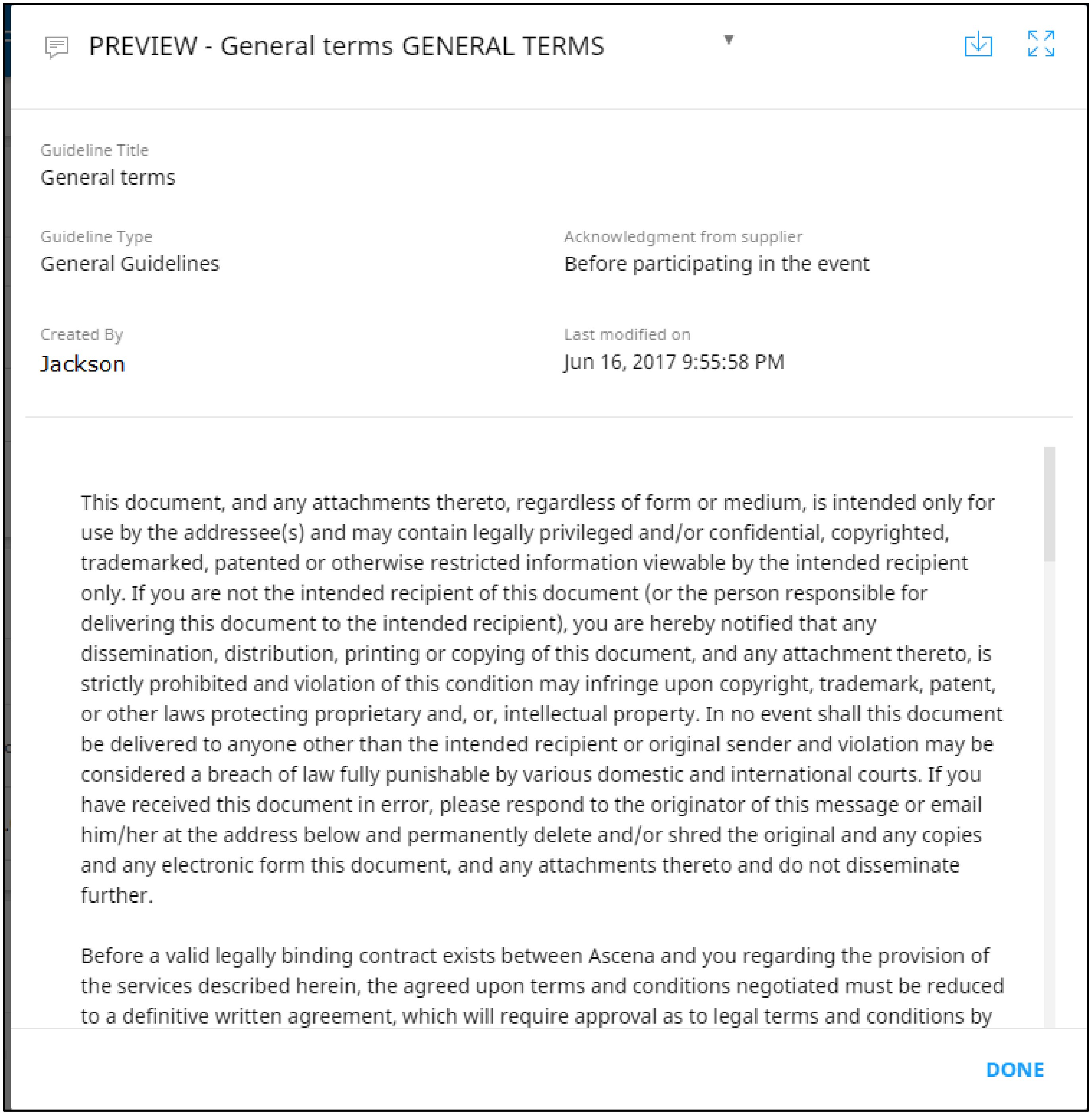
The Response timeline is the time frame within which you can respond to the buyer.



4.4 Guidelines

The Guidelines section includes the guidelines provided by the buyer that you need to follow while responding to an RFx.

Click the **Guideline name** to view the details of the guidelines.



4.5 Team Members

The Team Members section displays the team members that you have added. It enables you to respond to invited RFx event by collaborating with your team members.

Team members can be assigned below roles for any RFx event:

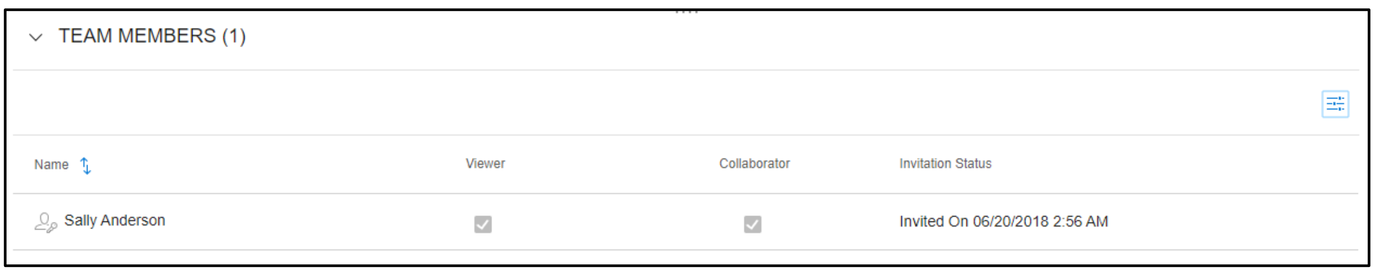
- **Primary Respondent**: The primary point of contact from Supplier Organization, ideally means the entire RFx response will be driven by this person. There can be only one Primary Respondent.
- **Collaborator:** Team member having rights equivalent to Primary Respondent. There can be multiple collaborators involved in an RFx event
- **Viewer:** Team member having only view access to event

Note

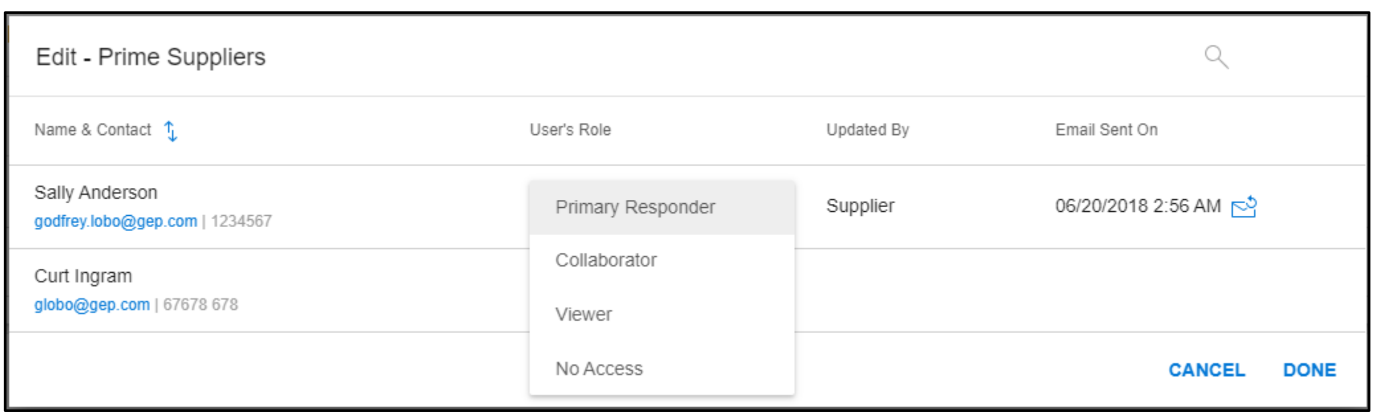
The above roles can be assigned or modified by the Event Author, Event Co-Author or by the Event Admin from the Buyer Organization or by existing primary Respondent or Collaborator from the Supplier Organization.

To configure team members:

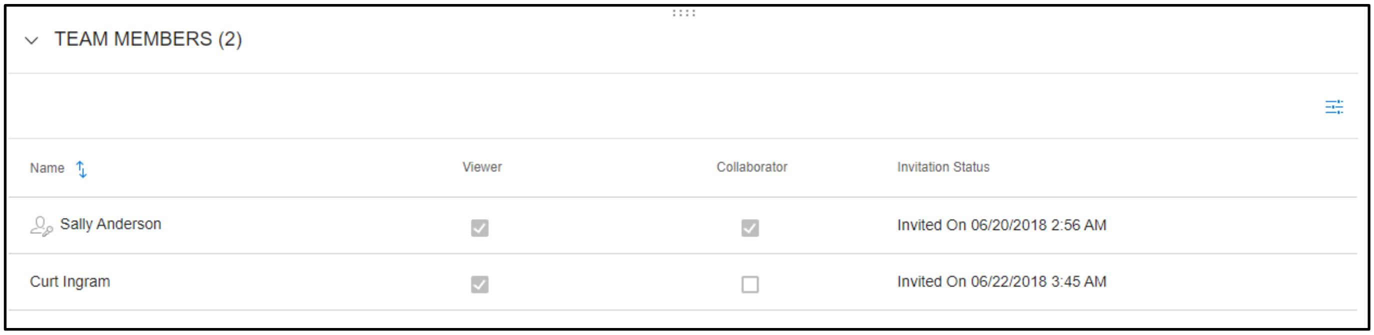
1) Click the **Configure** icon under the Team Members section.



2) Select the desired role from the user role drop-down list and click **Done**.



You can then view the added team members with the assigned roles in the team members section

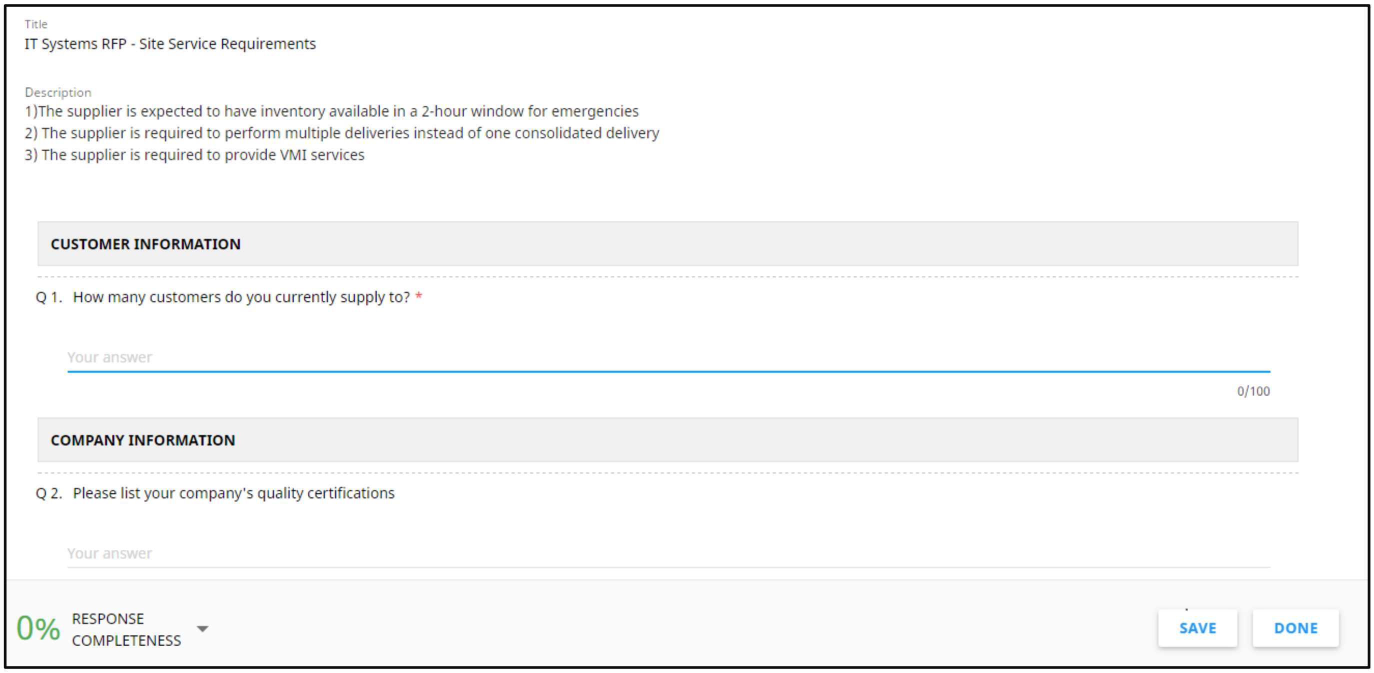


4.6 Questionnaire

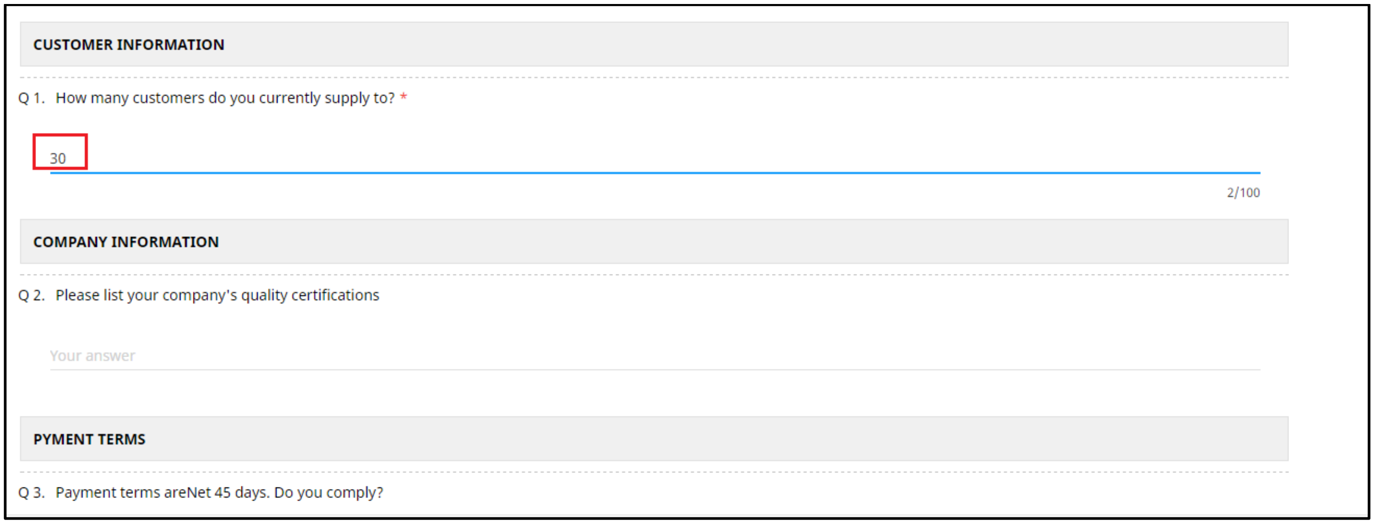
The Questionnaire section enables you to answer questions added by the buyer. Your response to the questions may determine your score when the RFx is evaluated.

To respond to the questions, under the **Questionnaire** section, click the edit icon against the respective question.

The following Questionnaire page is displayed:



You can respond to any questions added by the buyer, in the space provided for each respective question.



CUSTOMER INFORMATION

Q 1. How many customers do you currently supply to? *

30

2/100

COMPANY INFORMATION

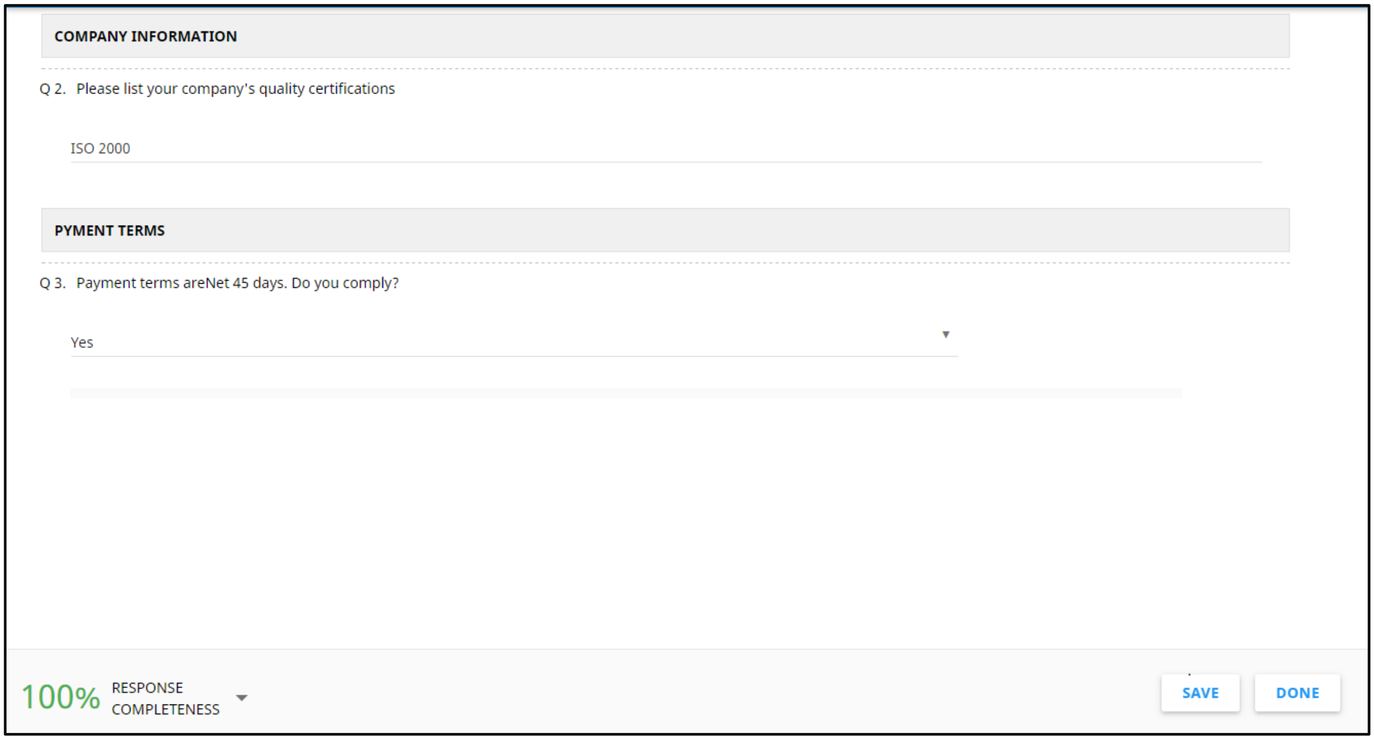
Q 2. Please list your company's quality certifications

Your answer

PYMENT TERMS

Q 3. Payment terms areNet 45 days. Do you comply?

The completion indicator on the bottom left corner of the page indicates the completion status of your response in percentage.



- Click the **Filters**  icon to apply filters on the list of questions.

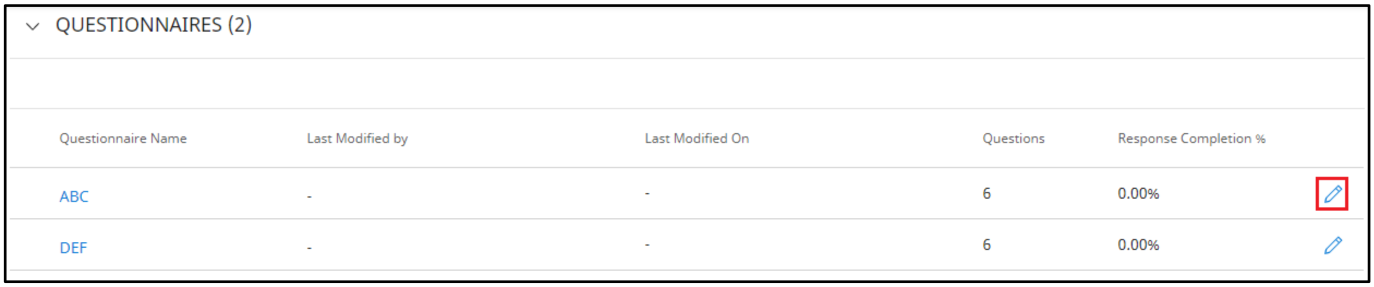
Select the desired option(s) from the list and click **Apply**.

Depending upon the type of questions configured by the buyer, the response type will vary.

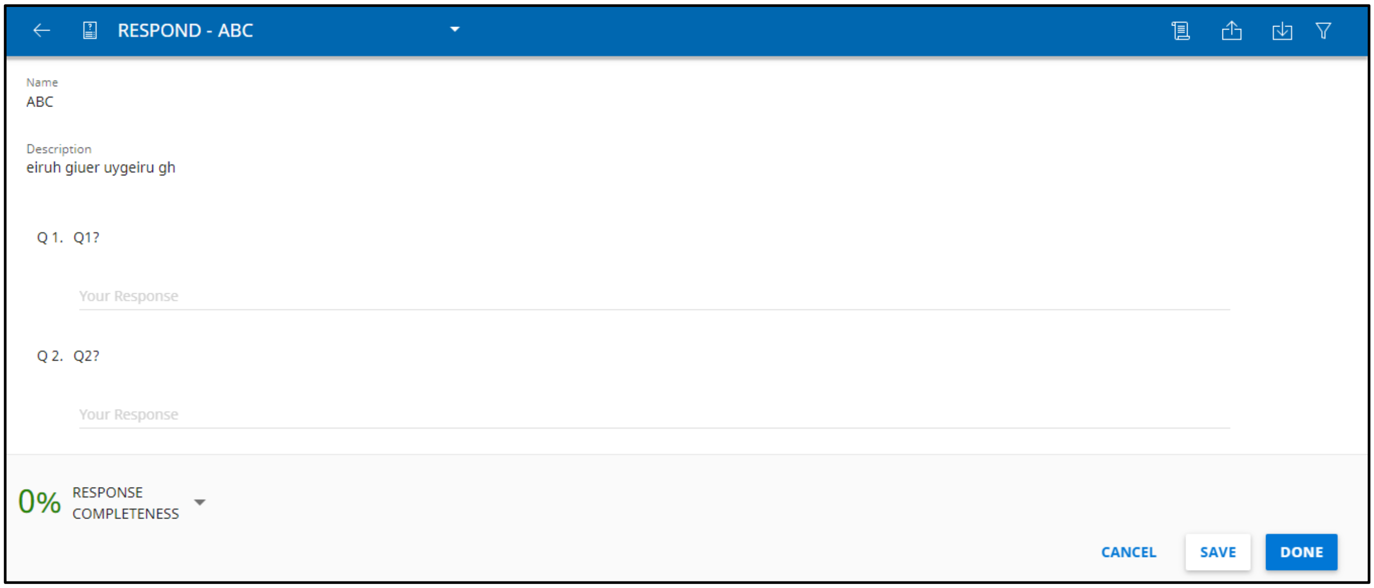
4.6.1 Responding to a Questionnaire Offline

To download a questionnaire:

1) From the Questionnaire section, open the desired questionnaire in edit mode.



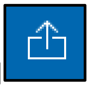
2) Click the Download  icon on the top-right corner of the questionnaire.

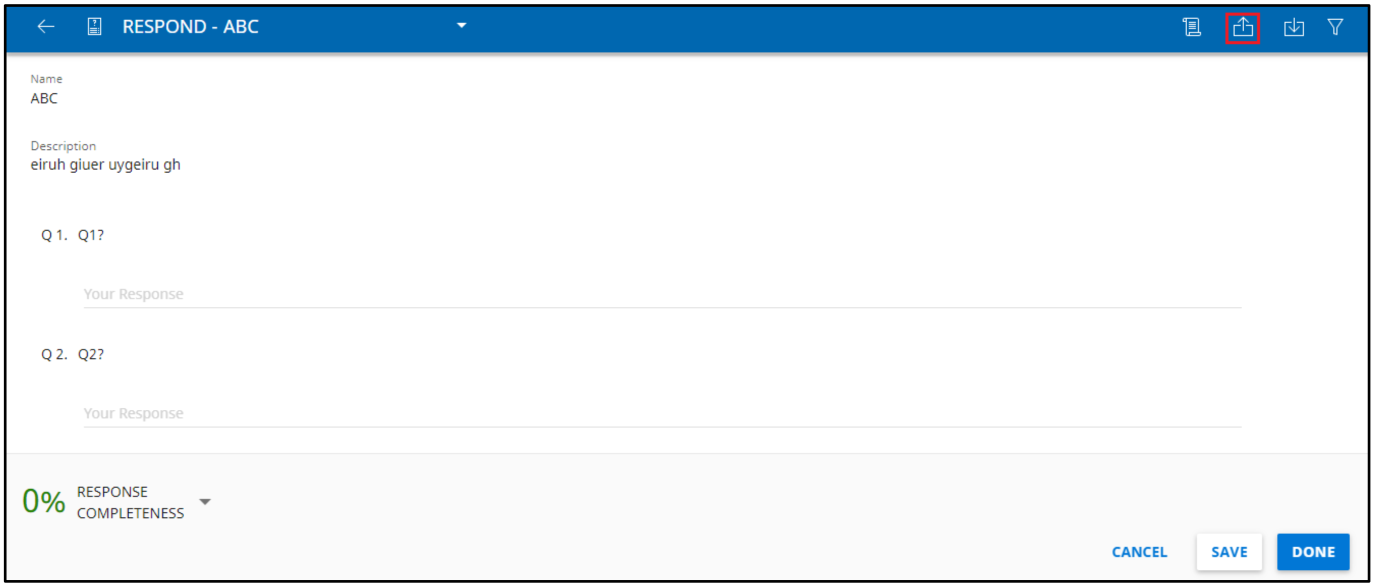


The questionnaire is downloaded in the form of MS Excel.

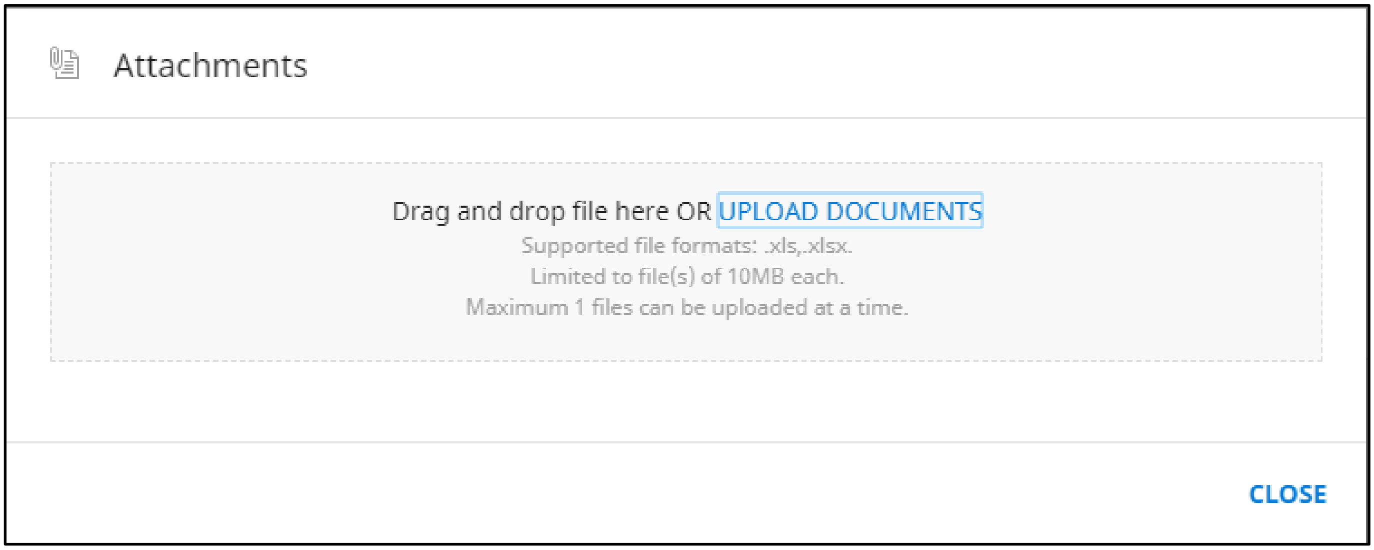
3) You can then go ahead and respond to the questions in the MS Excel itself.

4.6.2 Uploading the Questionnaire Response

1) Once you have responded to the Questionnaire in the MS Excel, click the **Upload**  icon on the top-right corner.



2) Drag and drop or upload the MS Excel file on the subsequent pop-up and click **Close**.

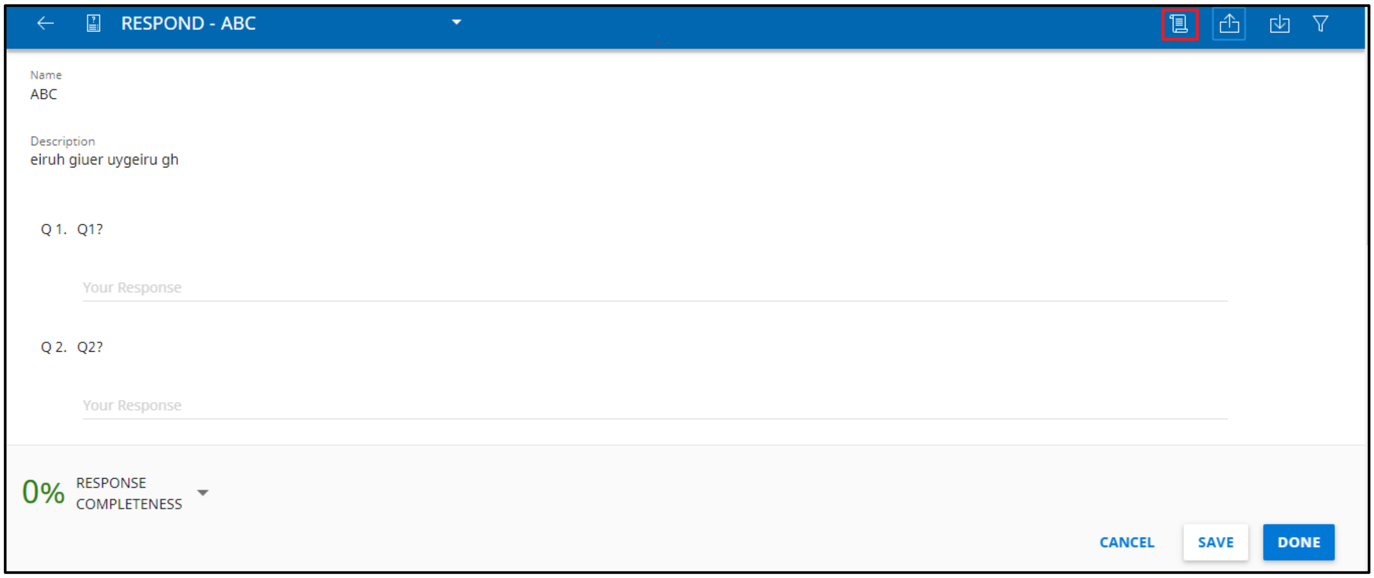


You can view the uploaded file in the Upload/Download Log. Also, the response is updated on the UI.

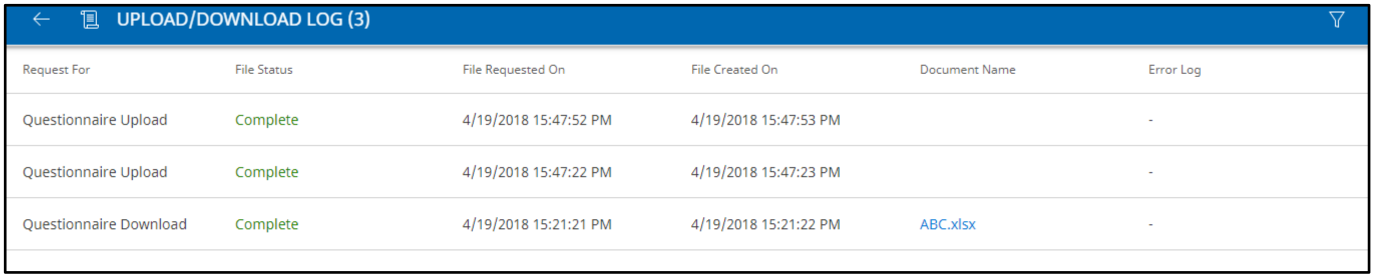
You need to refresh the page once, to view the response on the UI .

Note

3) Click the **Upload/Download log** icon to view the list of uploaded or downloaded Questionnaires.



The Upload/Download Log page is displayed as below:


UPLOAD/DOWNLOAD LOG (3)

Request For	File Status	File Requested On	File Created On	Document Name	Error Log
Questionnaire Upload	Complete	4/19/2018 15:47:52 PM	4/19/2018 15:47:53 PM		-
Questionnaire Upload	Complete	4/19/2018 15:47:22 PM	4/19/2018 15:47:23 PM		-
Questionnaire Download	Complete	4/19/2018 15:21:21 PM	4/19/2018 15:21:22 PM	ABC.xlsx	-

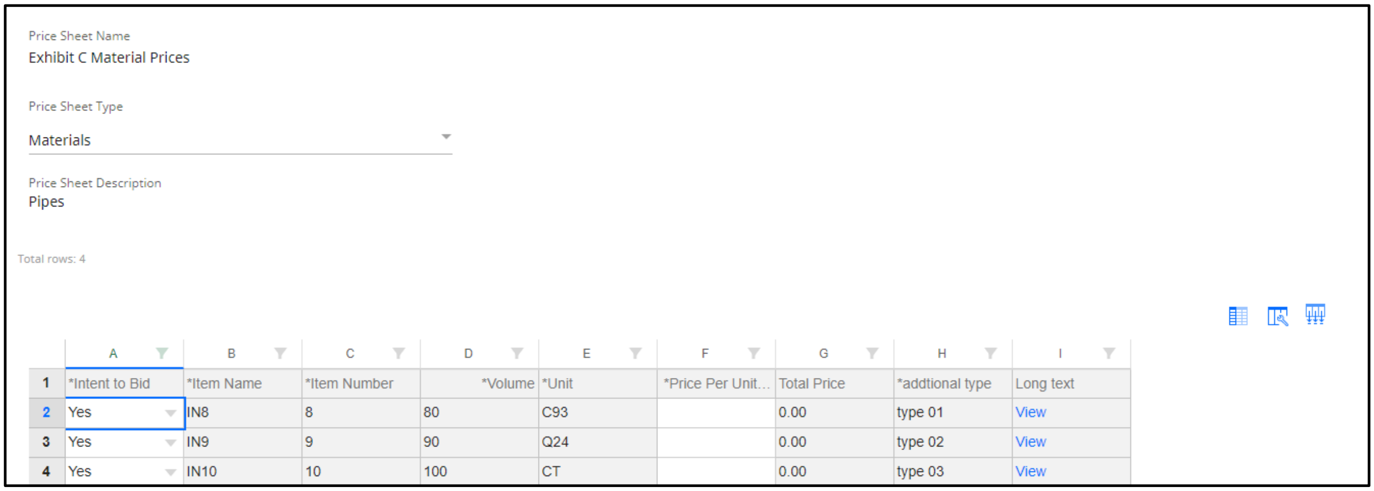
The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any.

Similarly, you can go ahead and respond offline to other questionnaires as well.

4.7 Price Sheets

A price sheet includes a list of items specified by the buyer. As a supplier, you can provide a quotation for the required items.

To view the price sheets, under the **Price Sheets** section, click the Price sheet name.



Price Sheet Name
Exhibit C Material Prices

Price Sheet Type
Materials

Price Sheet Description
Pipes

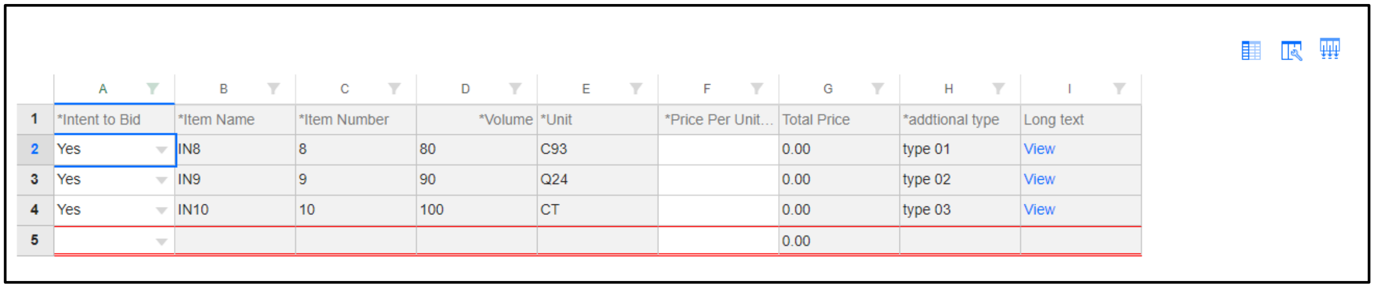
Total rows: 4

	A	B	C	D	E	F	G	H	I
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price	*addtional type	Long text
2	Yes	IN8	8	80	C93		0.00	type 01	View
3	Yes	IN9	9	90	Q24		0.00	type 02	View
4	Yes	IN10	10	100	CT		0.00	type 03	View

The columns and rows in the price sheet are non-editable.

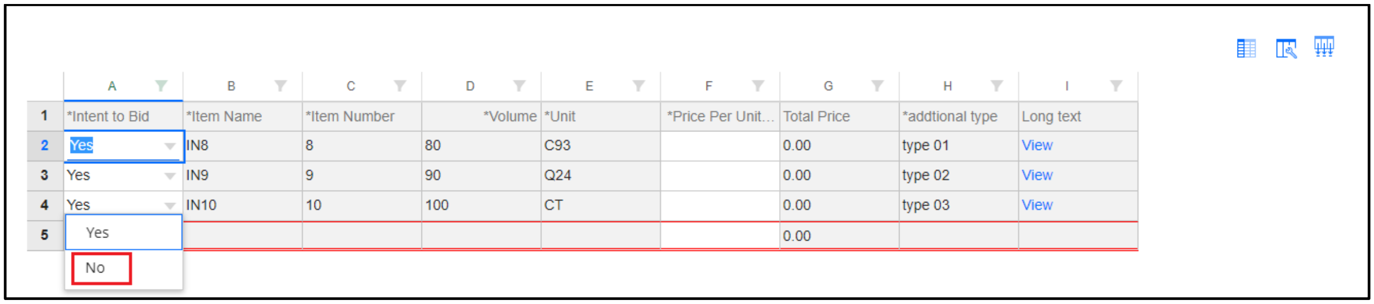
By default, the **Intent to Bid** field for each line item is set to Yes. This means you want to bid for the line item.

Fill in your quotation/details in the Price per unit column.



	A	B	C	D	E	F	G	H	I
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price	*addtional type	Long text
2	Yes	IN8	8	80	C93		0.00	type 01	View
3	Yes	IN9	9	90	Q24		0.00	type 02	View
4	Yes	IN10	10	100	CT		0.00	type 03	View
5							0.00		

In case you do not want to bid for the item, select **No** from the dropdown under the Intent to Bid column.



	A	B	C	D	E	F	G	H	I
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price	*addtional type	Long text
2	Yes	IN8	8	80	C93		0.00	type 01	View
3	Yes	IN9	9	90	Q24		0.00	type 02	View
4	Yes	IN10	10	100	CT		0.00	type 03	View
5	Yes						0.00		
	No								

4.7.1 Actions

You can perform the following actions on the price sheet that are available on the top-right corner of the Price sheet:

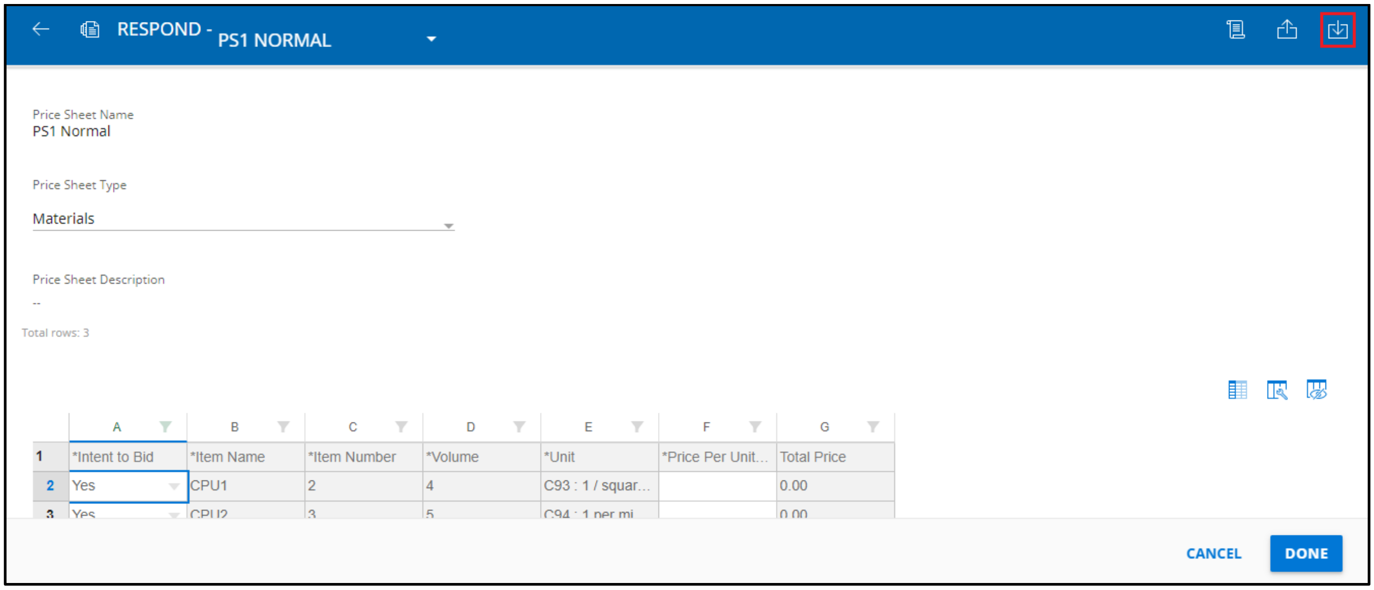
Action	Description
Freeze/Unfreeze	Freeze/Unfreeze rows/columns.
Show/Hide columns	Filter the required data.

4.7.2 Downloading a Price Sheet

You can download a Price sheet in the MS Excel format.

To download a Price sheet:

1) In the Price sheet section, open the required Price sheet in Edit mode.
2) Click the Download icon on the top-right corner of the Price sheet.



3) An MS Excel version of the price sheet is downloaded.

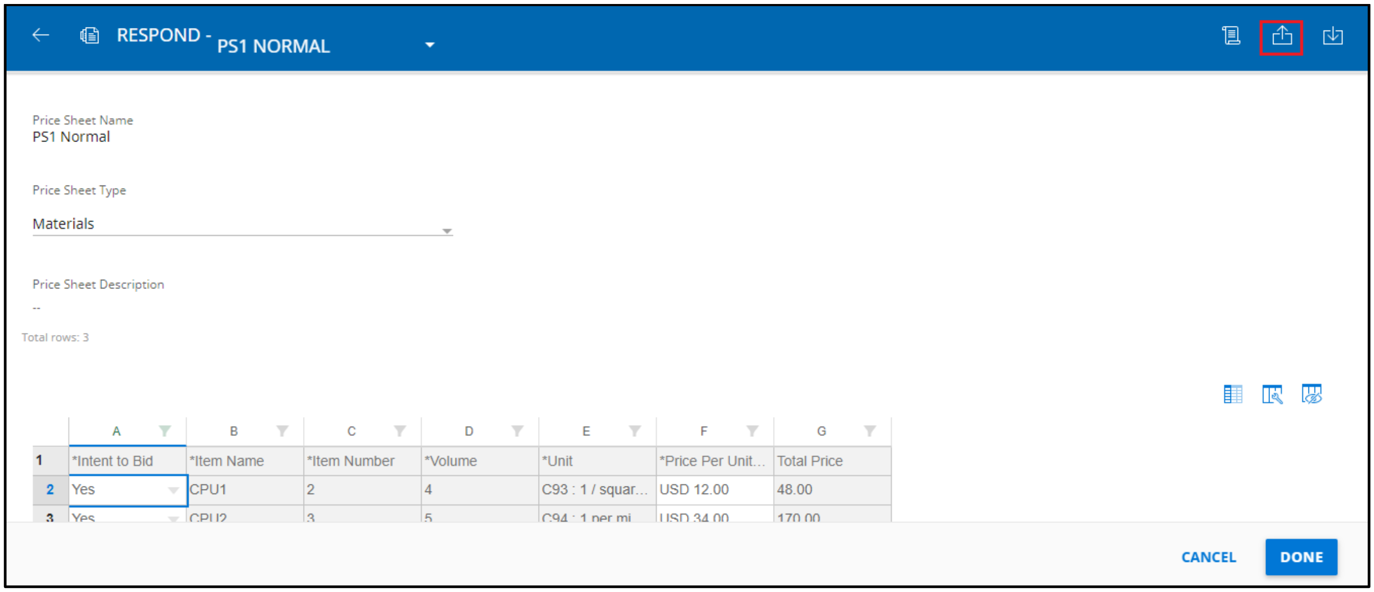
4) You can then go ahead and respond to the line items in the MS Excel.

Note

You need to first create a Price Sheet on the UI. You cannot add, edit or delete columns in the downloaded MS Excel Price Sheet.

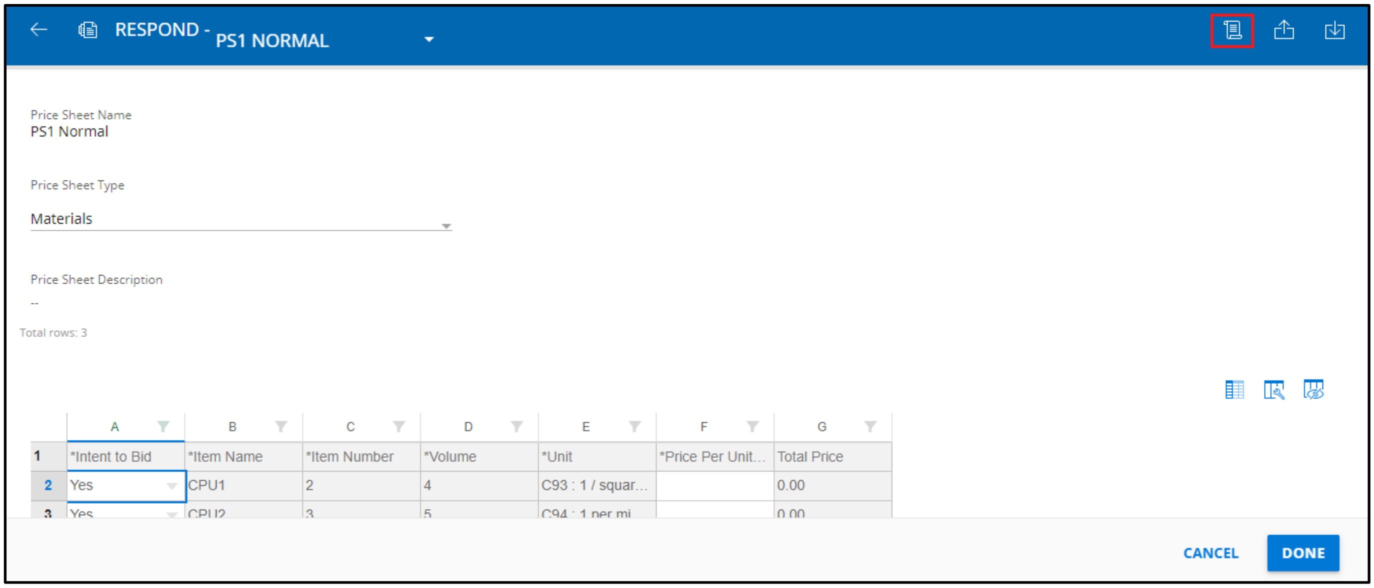
4.7.3 Uploading a Price Sheet

1) Once you have responded to the Price Sheets in the MS Excel, click the **Upload** icon on the top-right corner of the Price Sheet to upload your response.

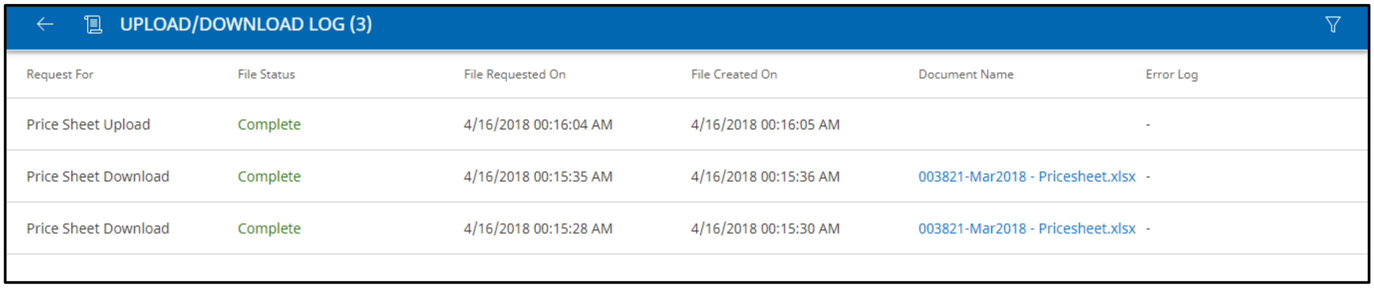


You can view the uploaded file in the Upload/Download Log.

2) Click the **Upload/Download log** icon to view the list of uploaded or downloaded Price Sheets.



The uploaded and downloaded files are displayed on the subsequent upload/download log page as shown below:


UPLOAD/DOWNLOAD LOG (3)

Request For	File Status	File Requested On	File Created On	Document Name	Error Log
Price Sheet Upload	Complete	4/16/2018 00:16:04 AM	4/16/2018 00:16:05 AM		-
Price Sheet Download	Complete	4/16/2018 00:15:35 AM	4/16/2018 00:15:36 AM	003821-Mar2018 - Pricesheet.xlsx	-
Price Sheet Download	Complete	4/16/2018 00:15:28 AM	4/16/2018 00:15:30 AM	003821-Mar2018 - Pricesheet.xlsx	-

The response is also updated on the UI.

Note

You need to refresh the page once, to view the response on the UI .

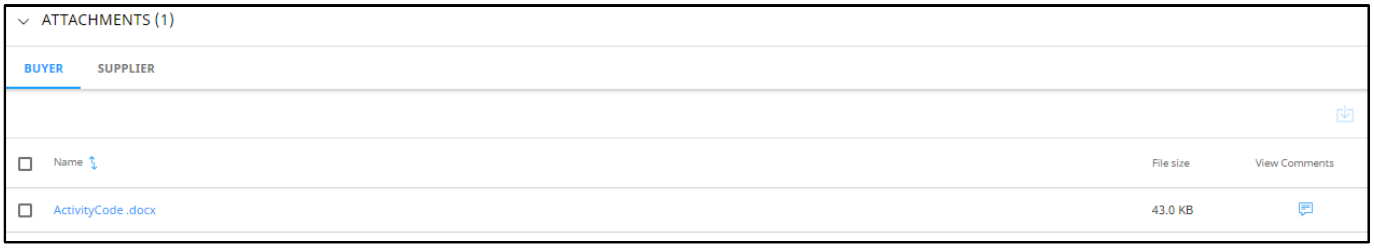
The log displays the file requested for, File status, File requested on, File created on, the document name and error log if any.

4.8 Attachments

The Attachments section displays all the attachments and support documents added by the buyer. The attachments added by the buyer are displayed under the Buyer tab. You can also add your own attachments. The attachments added by you are displayed under the Suppler tab.

Perform the following steps to view the attachments:

1) In the Attachments section, under the Buyer tab, click the attachment name to view the attachment provided by the buyer.



2) For each attachment, click the **Comments**  icon to view the comments provided by the buyer.

Chapter 5: Group Discussion

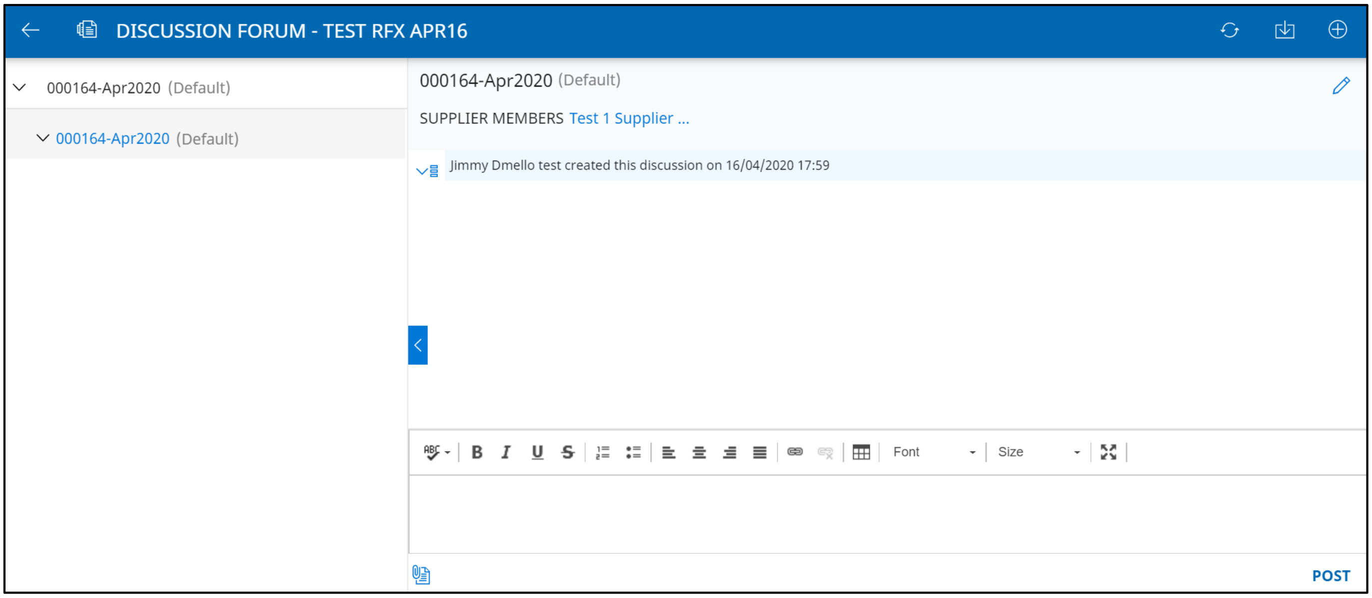
Using the group discussion forum, you can view and take part in various discussion topics that are created by the buyer, as well as create your own topics.

Note

Any topics that you create are visible only to the buyer.

The group discussion forum becomes active only after the event is published and you have confirmed participation.

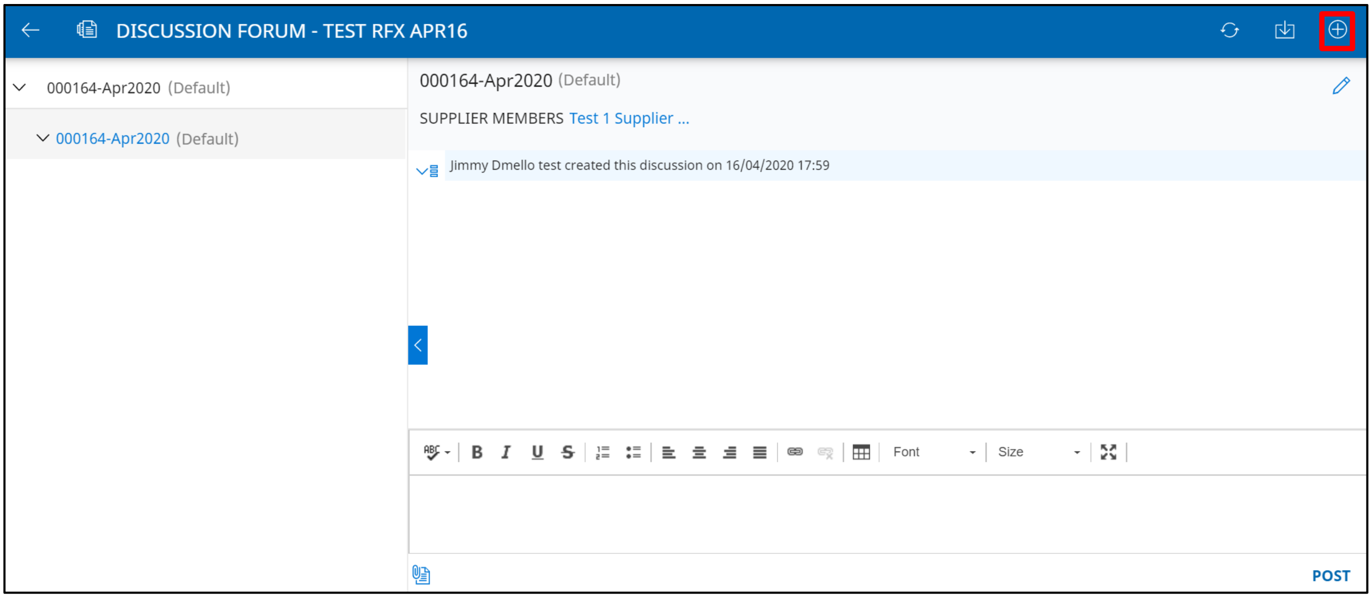
To open the discussion forum, click the **Discussion Forum** icon, displayed next to the event timer.



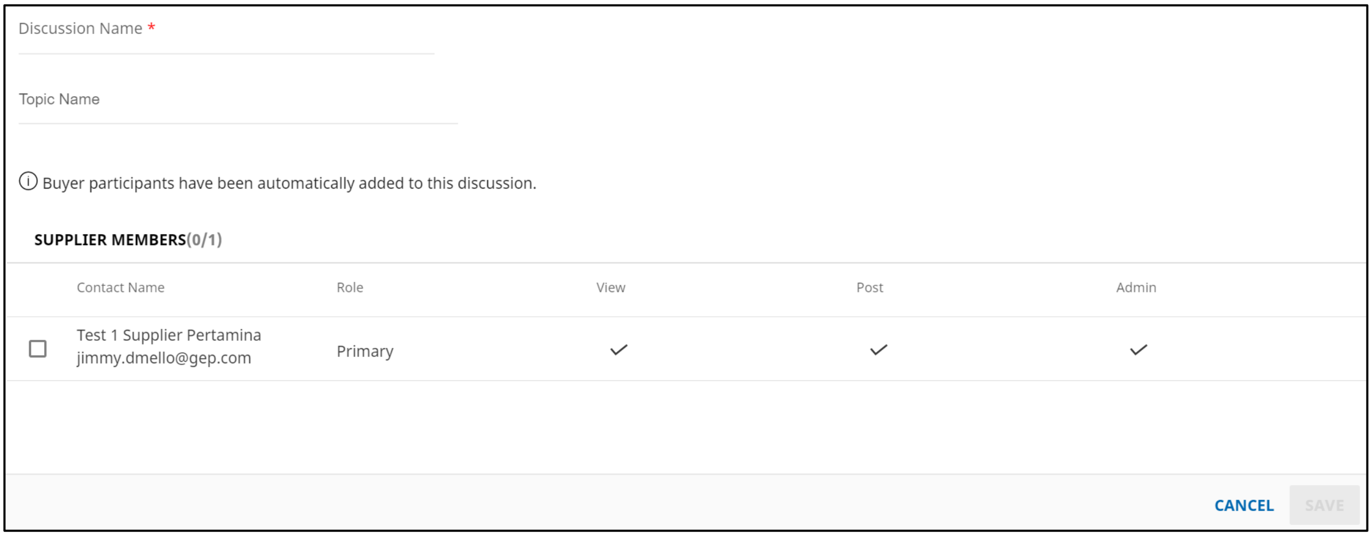
You can view and respond to the discussions that the buyer may have initiated in the discussion forum. You can start a discussion once the event is published.

To view and create your own topic:

3) Click the icon, next to the timer, on the RFx page.
4) To add a new discussion:
   a) Click the **Add New Discussion** icon.


DISCUSSION FORUM - TEST RFX APR16
000164-Apr2020 (Default)
000164-Apr2020 (Default)
000164-Apr2020 (Default)
SUPPLIER MEMBERS Test 1 Supplier ...
Jimmy Dmello test created this discussion on 16/04/2020 17:59
Font
Size
POST

b) Provide a title and description for the discussion, in the respective fields. Select members.



c) Click **Save.**

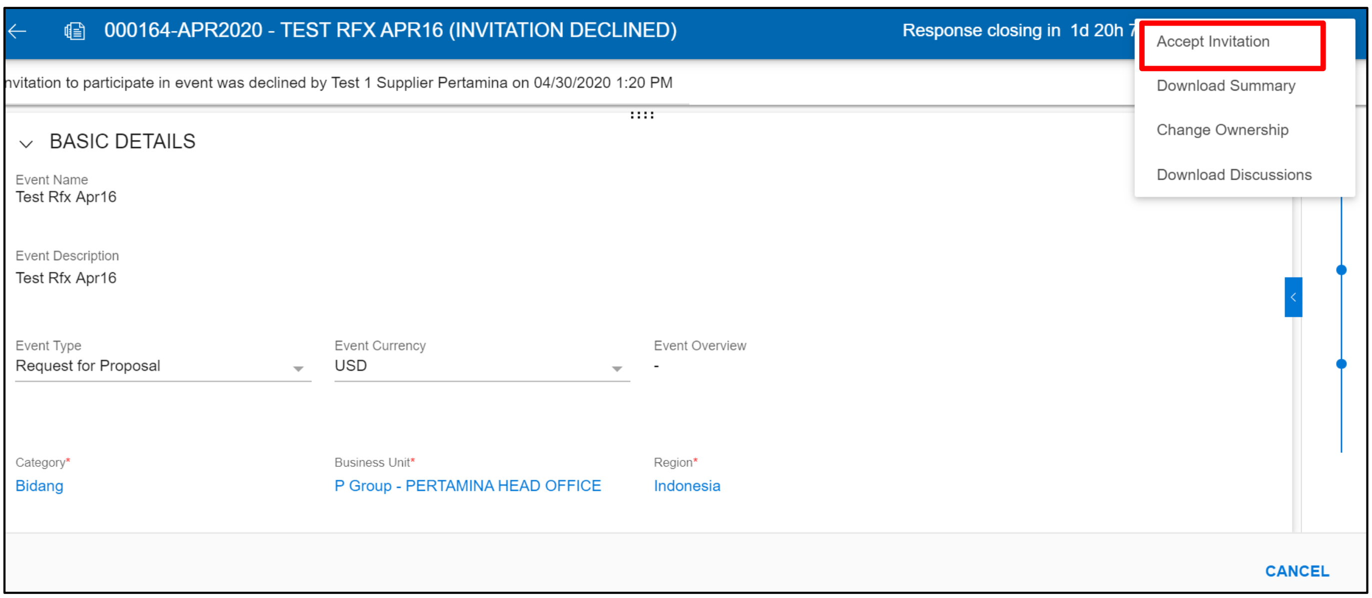
Chapter 6: Performing Actions

In this section, you will learn about the different actions that you can perform to an existing RFx.

6.1.1 Accepting Event Participation

Even though you have declined to participate in an RFx event, you still have a chance to participate again until the response timeline is open.

1) Click the **Actions** icon on the top-right corner of the RFx event and then click **Accept Invitation**.



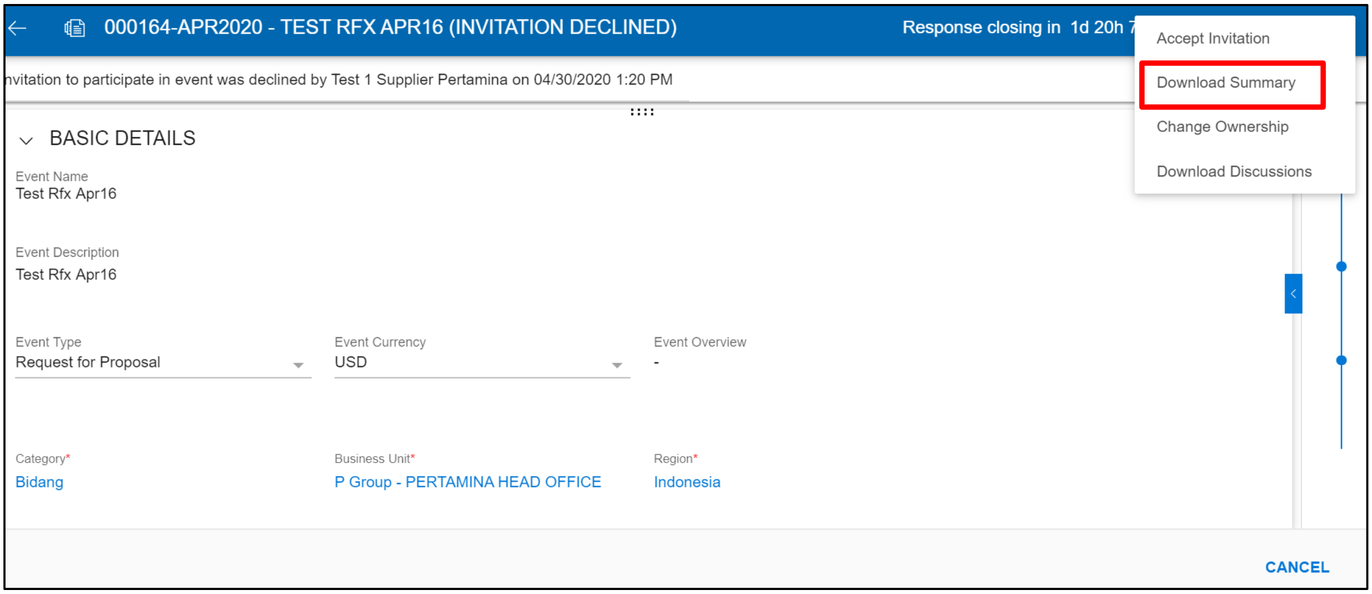
2) Click **Yes** on the following confirmation pop-up.
3) Click **Ok** on the Success pop-up.

6.1.2 Downloading Event Summary

The Download Summary option under the Actions menu helps you download the Event summary in the MS Word format.

To download the event summary:

1) Click the **Actions** icon on the top-right corner of the event page and then click **Download Summary** from the options.



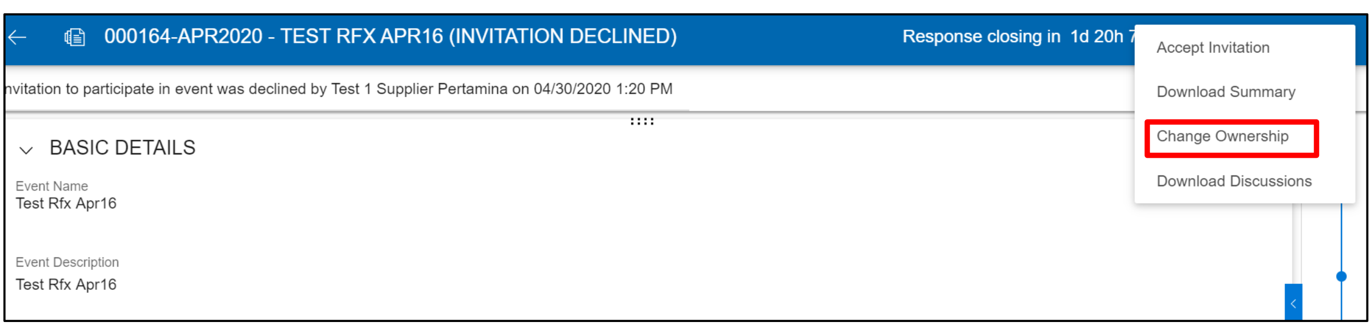
The event then gets downloaded in the MS Word format.

6.1.3 Changing Ownership

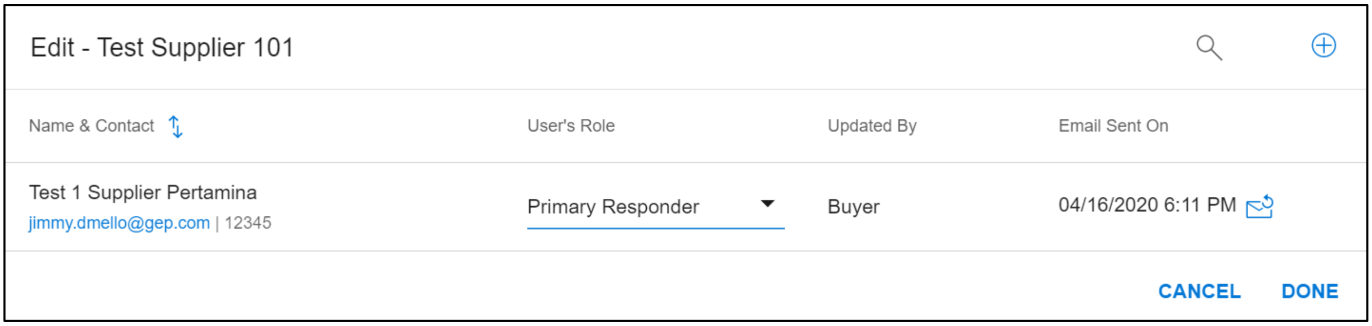
The Change Ownership option allows you to assign other contact from your organization as a Primary responder. So, the team-member can then respond to the Price Sheets and Questionnaires.

To change ownership:

1) Click the **Actions** icon on the top-right corner of the RFx event and then click **Change Ownership.**



2) On the subsequent pop-up, select the contact you wish to make as a Primary Responder and click **Done**.



3) Click **Yes** on the confirmation pop-up.

The new contact that you selected now becomes the Primary Responder who now has access and can respond to the RFx event.

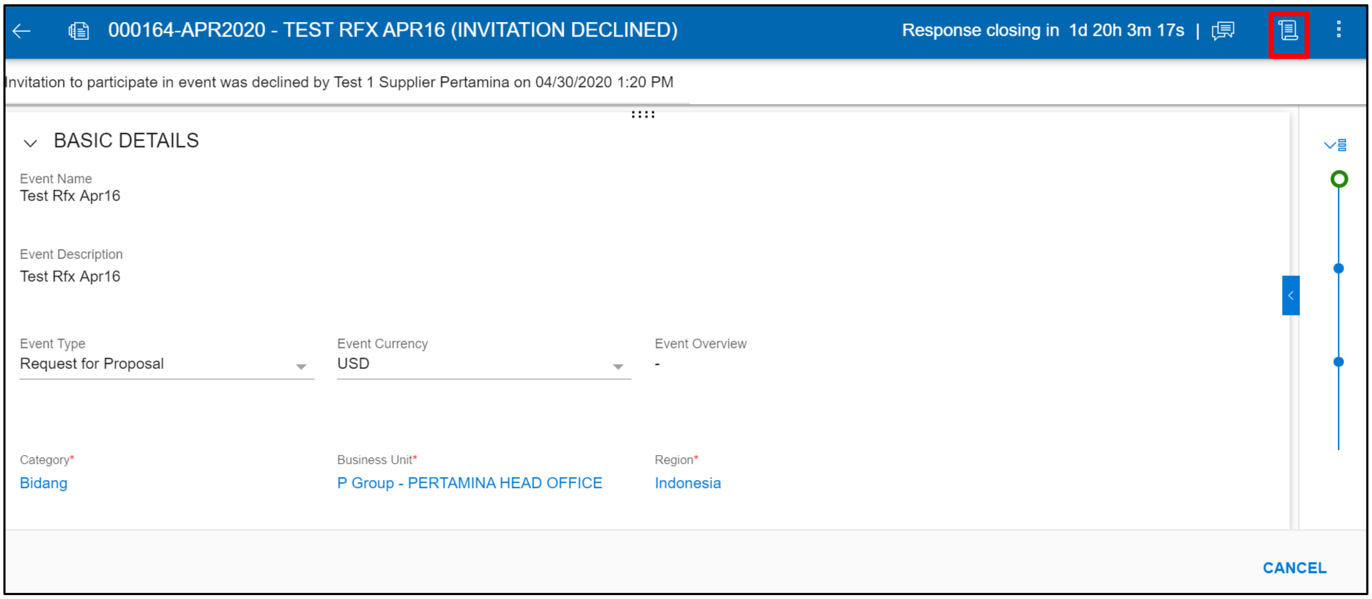
An Email notification will be sent to the previous responder and to the New Primary Responder. Also, the buyer will be notified about the change through Email.

6.1.4 Viewing Upload/Download Logs

You can view logs of all the uploaded/downloaded files. All the files that you upload/download from the Questionnaires or Price sheet section, for the RFx event are displayed, thus saving your time to navigate to various section to fetch the file.

To view the log:

1) Click the **Upload/Download Log** icon on the upper-right corner of the RFx event page.

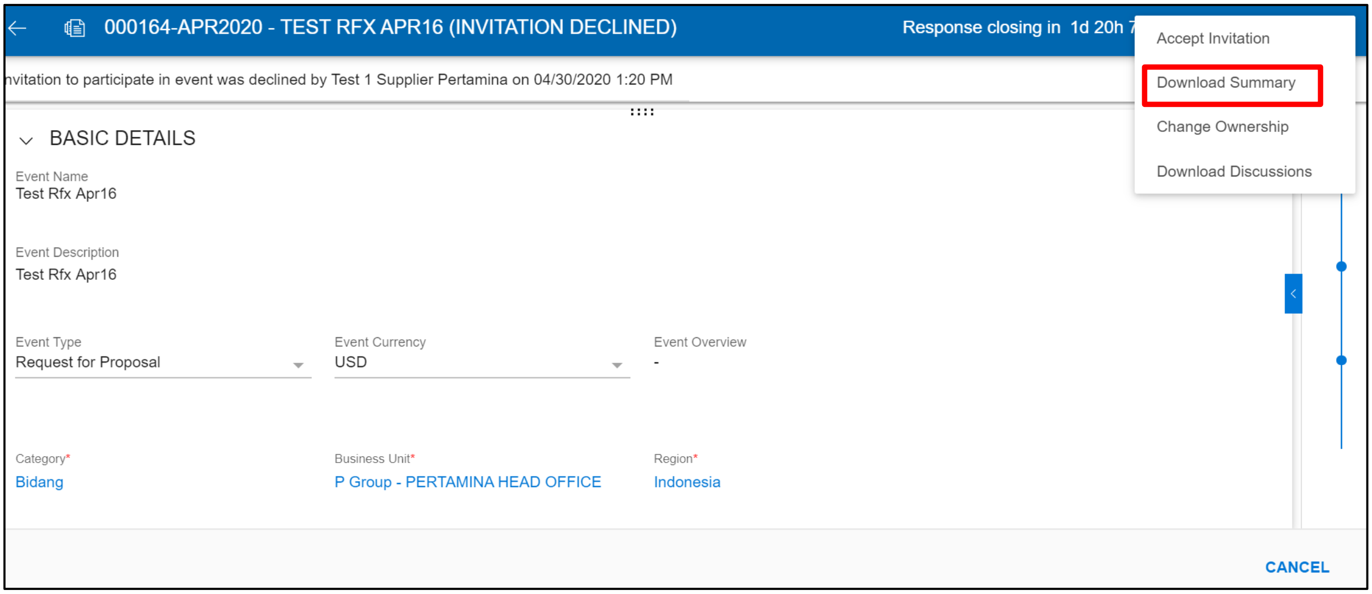


6.1.5 Downloading Event Summary

The Download Summary option under the Actions menu helps you download a consolidated zip file containing the summary of the event, guidelines, price sheets, and questionnaires.

To download the event summary:

1) Click the **Actions** icon on the top-right corner of the event page and then click **Download Summary** from the options.

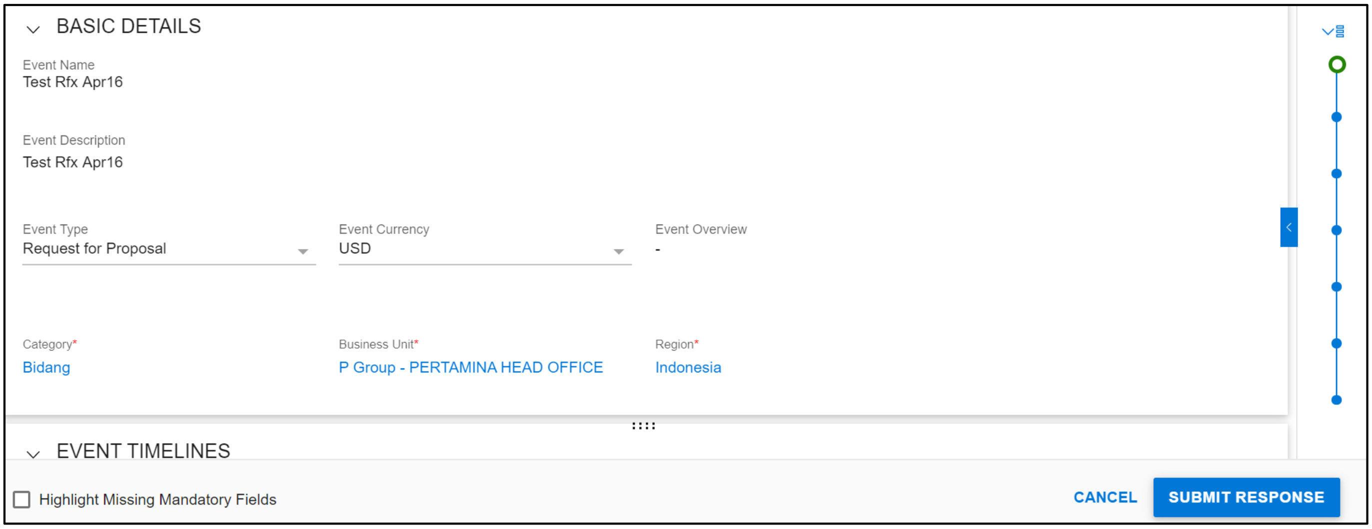


The event then gets downloaded in the zip file that contains the guidelines, price sheets, questionnaires and the event summary.

Chapter 7: Submitting a Response

After viewing all the required details on the RFx and responding to the questionnaires and price sheets, as applicable, you can submit your responses to the buyer.

Click the **Submit Response** button on the bottom right corner of the RFx page to submit your response.



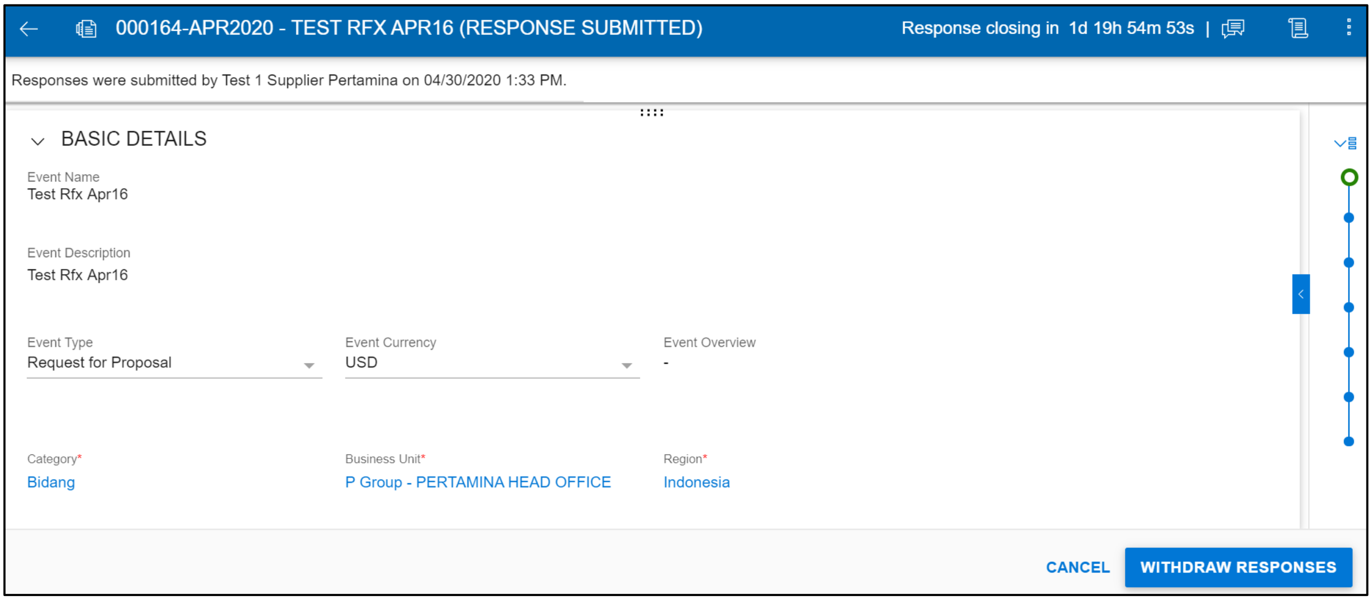
Once the response is submitted, the status of event changes to Response Submitted.

Chapter 8: Withdrawing Response

You can withdraw your submitted responses in a sourcing event, for revision or correction. The revised responses can then be resubmitted until the Response timeline is active.

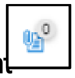
To withdraw responses:

1) Click the **Withdraw Responses** button at the bottom-right corner of the desired RFx event.



2) Click Yes on the subsequent pop-up.
3) Mention the reason or comments of withdrawing your response in the field provided.

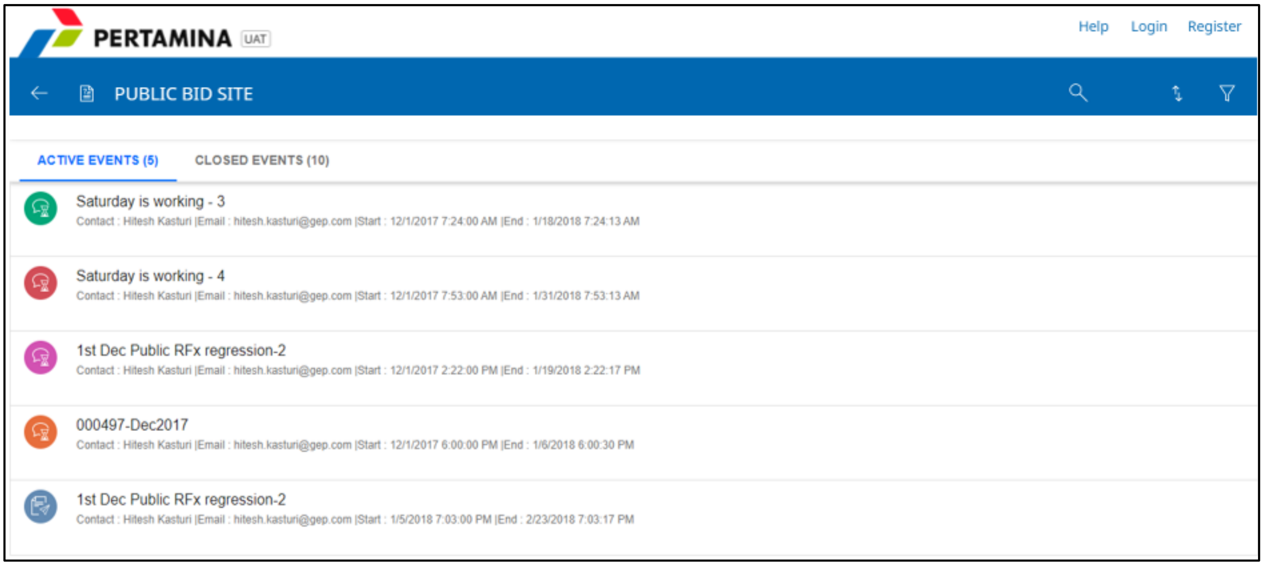
4) Click **Post**.

You can also upload an attachment by clicking the **Attachment**  icon.

Chapter 9: Participating in a Public RFx

Public RFx is an RFx event that can be accessed by Suppliers on a publicly available website. All Suppliers can participate in this event. For suppliers who already have a SMART by GEP account, can directly login and participate in the event. The suppliers who do not have a SMART by GEP account need to first register to participate in the public RFx event.

You, as a supplier can view the Public RFx event on a public website page as shown below:



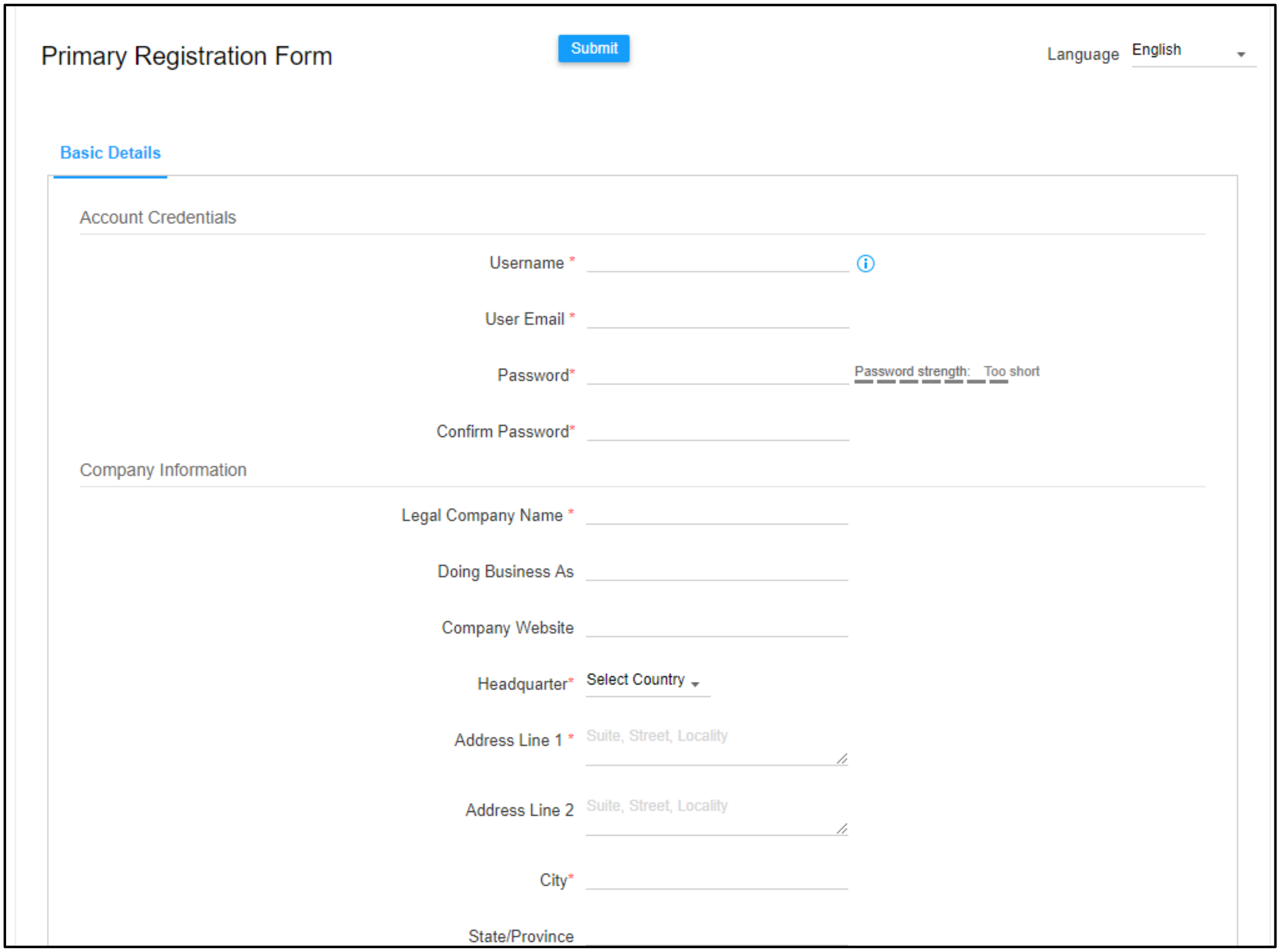
The Public RFx page displays a list of Active and closed RFx events. The RFx events whose Response time is about to start or is already started is listed under the Active RFx events. The RFx events whose Response time is already closed are listed under the closed RFx events.

9.1 Creating a SMART by GEP account and participating

If you do not have a SMART by GEP account, you need to first register and create an account.

1) Click **Register** on the Public website page.

You can then see a Primary Registration Form.



2) Enter all the details in the Primary Registration Form and click **Submit**.

3) You will then receive an email notification to activate your account.

Dear John jackson,

Thank you for filling the Registration form. Before we can activate your account one last step must be taken to start using GEP Smart.
In order to activate your account, please visit this URL:

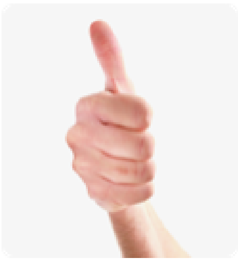
Click here

Please note-you must complete this last step in order to use the GEP Smart account. You will only need to visit this URL once.

Regards,

GEP

4) Click on the link provided in the Email to activate your account.
   You can then view the following success page.



Congratulations!!!

You have successfully activated your account.
Now you can log on to SMART by GEP to get some great benefits which will help you grow your business further.
Click Here to login

Thanks,
SMART by GEP Team

Supporting you from United States, Asia and Europe

Phone:
US: +1 732 428 1578
Europe: +42 022 598 6501
Asia: +91 22 6137 2148
Australia: +61 285 181 914
UK: +44 203 478 6123

Email: support@gep.com

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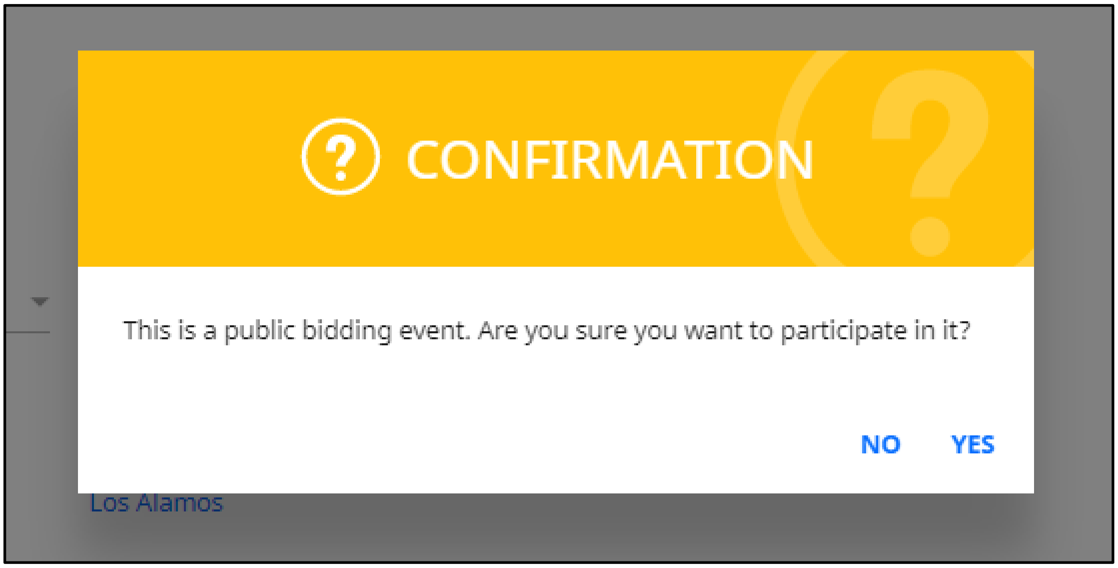
5) Click the **Click Here** link to login and participate in the event.
6) Once you have logged in, Click **Manage**.

7) Scroll to find the RFx card and click the **Show All** button at the bottom of the card

On the subsequent Manage-RFx page you can see a list of RFx events.

8) Click the event in which you wish to participate.
You can then see a Confirmation pop-up, click **Yes**.



9) You can then go ahead and respond to the RFx like a Regular RFx as explained in the earlier chapters

Note

The public RFx will be accessible to all contacts from your organization, once they log into their Smart by GEP account. This means any contact from your organization can participate in the public RFx by answering the confirmation question shown above.

9.2 Using an existing SMART by GEP account

1) If you have a SMART by GEP account, click **Login** on the public website page.
2) Enter your id and password and click **Login**.
3) Click **Manage**.
4) Scroll to find the RFx card and click the **Show All** button at the bottom of the card.

On the subsequent Manage-RFx page you can see a list of RFx events.

5) Click the event in which you wish to participate.
6) You can then view and respond to the RFx like a regular RFx as explained in the earlier chapters.

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, unrivaled 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 centers 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 honored as an innovator and leading provider of source-to-pay procurement software by top industry and technology analysts, such as Forrester, Gartner, Spend Matters, Paystream and Ardent Partners. GEP also earns top honors 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; NelsonHall 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.

To learn more about our comprehensive range of strategic and managed services, please visit www.gep.com. For more about SMART by GEP, our cloud-native, unified source-to-pay platform, please visit www.smartbygep.com.