SMART by GEP®
Unified Procurement Platform

SUPPLIERS ON-BOARDING USER MANUAL

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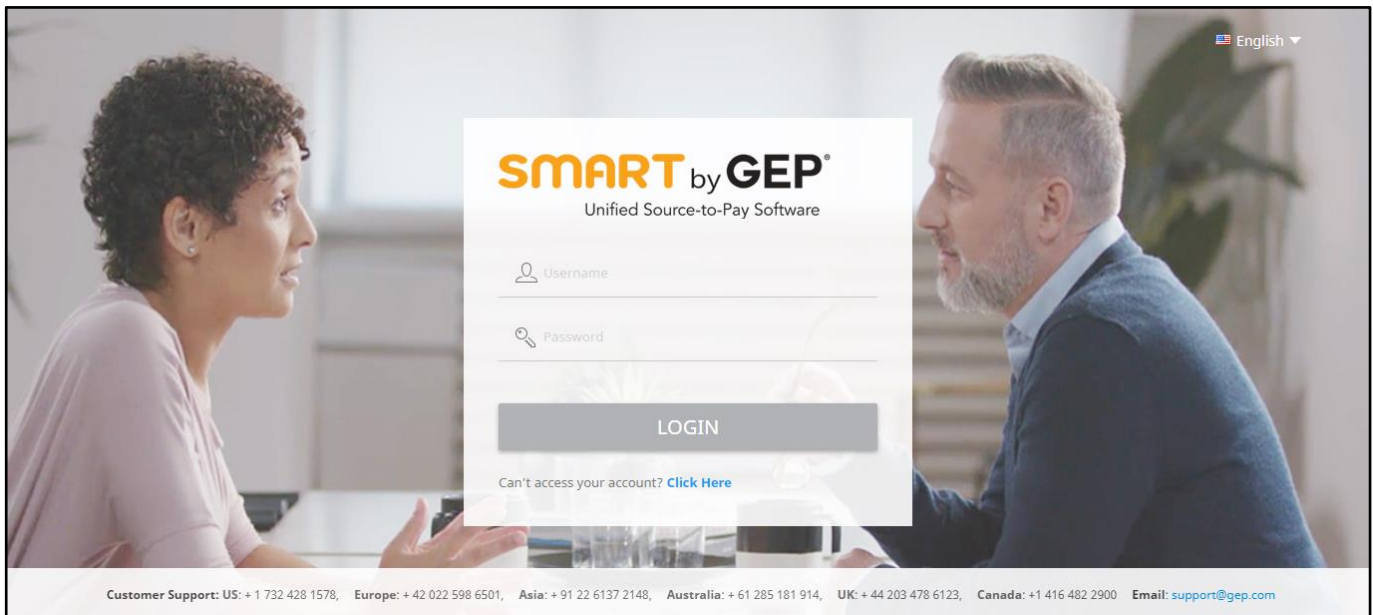
Chapter 1:   Getting Started

The SMART by GEP® e-procurement software platform enables you to automate and manage your sourcing and procurement tasks. You can access SMART by GEP® on any device such as a PC, laptop, tablet, or mobile phone.

1.1   Logging into SMART by GEP®
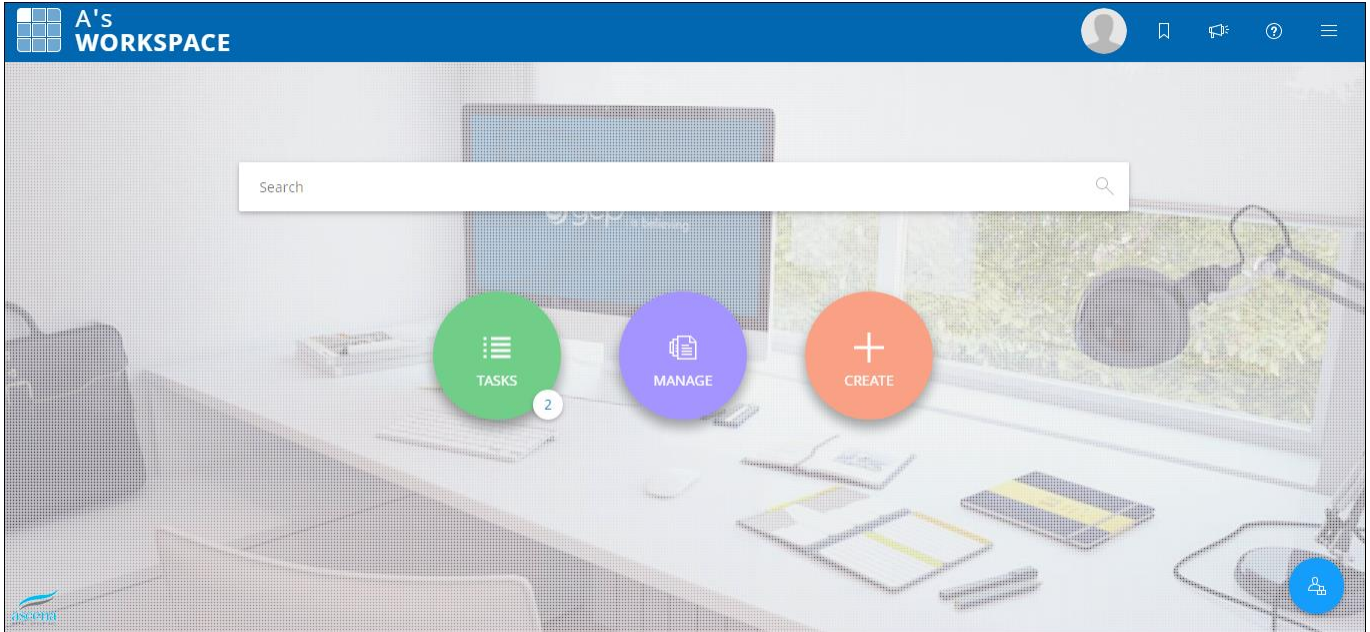
To log into SMART by GEP®, type your username and password, and click **Login.**

After authentication of login details, the following profile page is displayed.

The Workspace home page is displayed as follows:

1.2   Logging out of SMART by GEP®

On the Workspace home page, in the upper-right corner of the page, click the Navigation 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 SMART by GEP using one of the following ways:

- The buyer organization may publish the registration link on its website from where you can access the Primary Registration Form.
- The buyer may invite you to fill the Primary Registration Form. In that case, you will receive the below email with the registration link:

Dear Robert Owen,

Gep has sent you its primary registration form. In order to start filling it, you just need to
Click Here
Please enter the responses and submit the form. The login credentials would be created on submission and you can then access the system.
Please note that the supplier manager(s) assigned to Edison Ltd is/are GEP Admin.

In case of any queries, please contact GEP Support at the following:

Phone:

USA: +1 732 428 1578

Asia: +91 22 61 372 148

Europe: +42 022 59 86 501

Email:

Support@gep.com

Regards,

GEP

To Avoid emails going to spam or junk folders
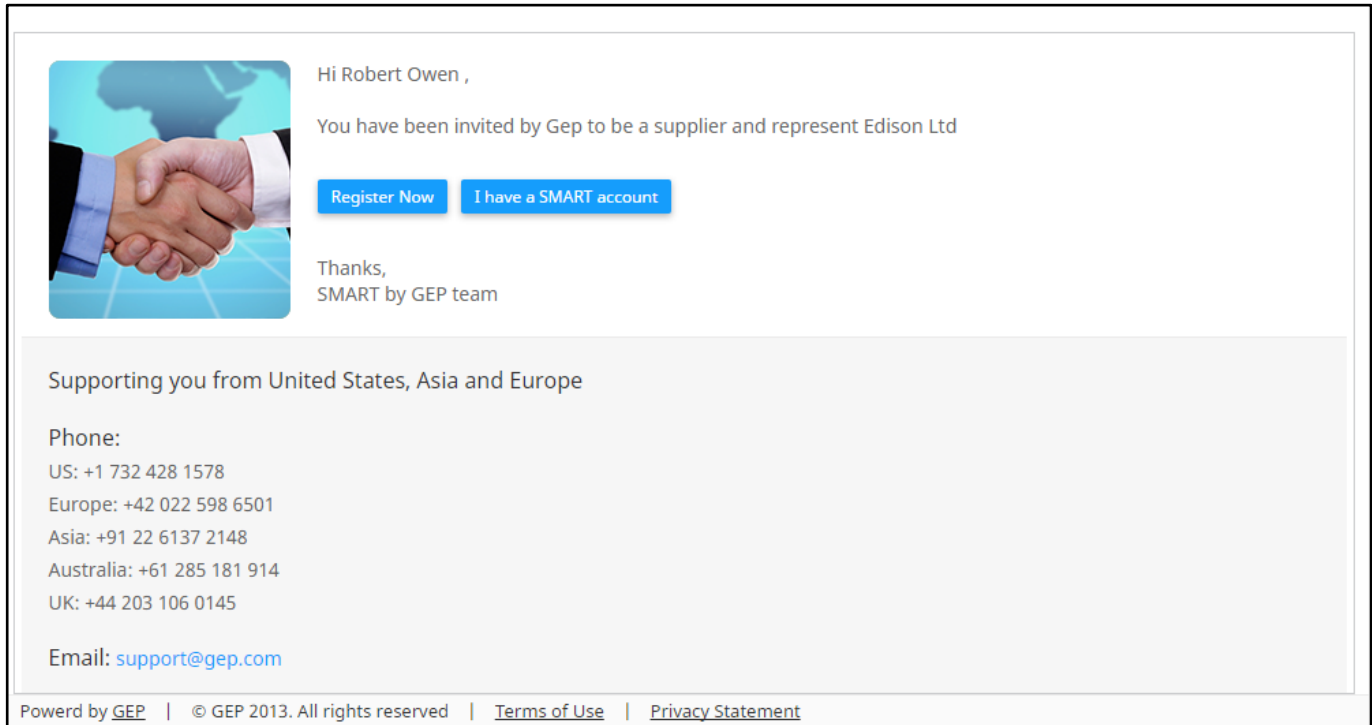
To ensure you receive all emails from support@gep.com in your inbox, please mark this email address as safe. Sender email address can be marked safe by adding it in the safe senders list, contacts list or your address book.

To complete the registration:

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

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

Hi Robert Owen ,

You have been invited by Gep to be a supplier and represent Edison Ltd

Register Now   I have a SMART account

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: +44 203 106 0145

Email: support@gep.com
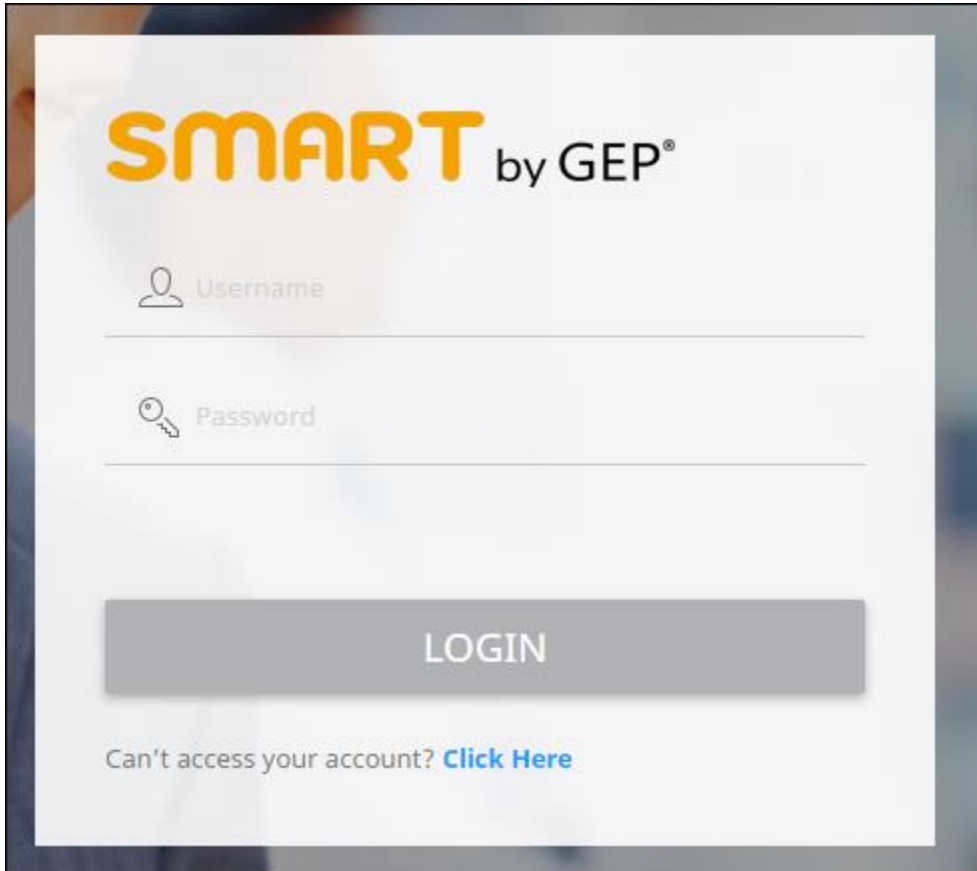
Powerd by GEP | © GEP 2013. All rights reserved | Terms of Use | Privacy Statement

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.

SMART by **GEP**®

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:

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

Once you verify your account the below screen appears:

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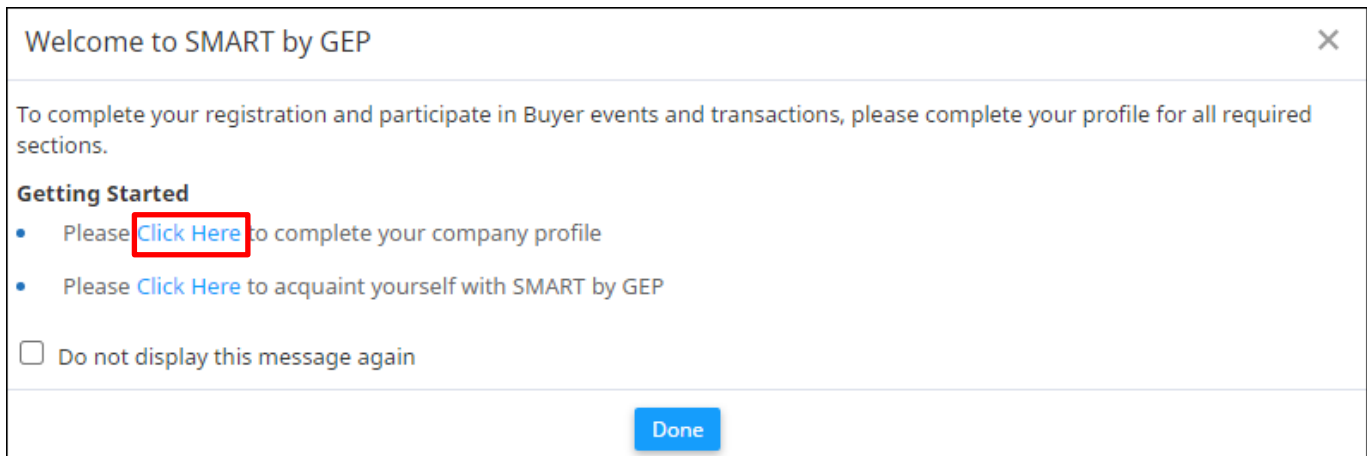
You can login to the tool with the Username and Password created in the Primary Registration Form.

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Chapter 3:   Profile Completion

On successful login, you can view the following Welcome to SMART by GEP pop-up:

Click **Click Here** to complete your company profile. The company profile page appears.

Similarly, you can also update your profile from the Workspace home page.
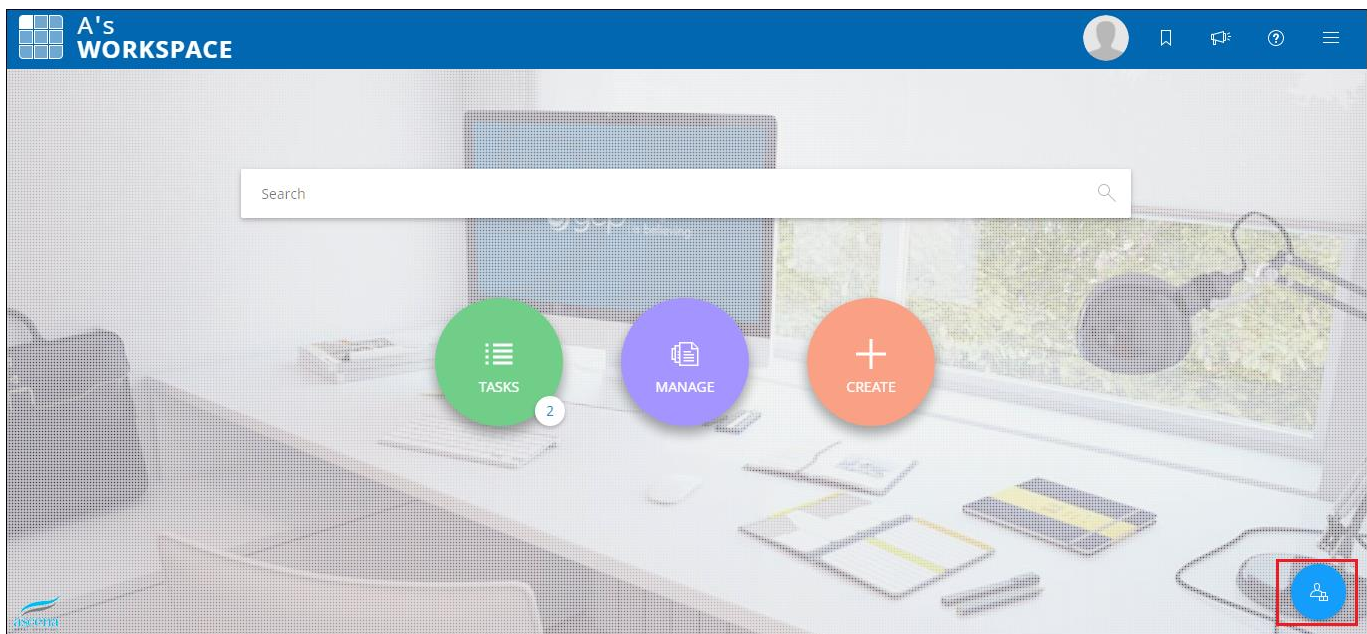
Click the Profile icon to update the details.

You can add or update the details on this page. This page contains the following tabs.

- Basic Details

- Identification Information

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- **Supplier Source Information**

- **Certifications**

- **Diversity Status**

- **Registration Information**

- **Location Information**

- **Contact Information**

- **Business Information**

- **Transaction Type**

- **Marketing Information**

- **Payment Terms**

- **Documents**

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.

Supplier management in SMART by GEP follows a parent-child hierarchy system. To know about the parent child hierarchy tree control implemented, see Viewing the Parent Child Hierarchy.

The information on the Basic Details section is displayed as shown below:

3.1.1.1   *Viewing the Parent Child Hierarchy*

Each supplier profile has the provision to capture the parent company. Click the [icon] icon to view the parent child hierarchy tree control, as shown below:

The parent child hierarchy shows a list of parents, grandparents, siblings, and children suppliers.

Click ICARD ⊞ icon to view the supplier iCard.

The supplier iCard displays the basic information of the supplier profile. Also, based on the configuration, the supplier contacts may can view the iCards of their parent and children organizations.

3.1.2   Identification Information

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

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

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IDENTIFICATION INFORMATION

Identification type		Number	
VAT Registration Number	▼	VAT123456	🗑
VAT Registration Number	▼	VAT23456	🗑
GST/QST/HST	▼	12312355	🗑
TIN Number	▼	TIN12345	🗑
Choose your option	▼	Please Enter	🗑 ⊕

3.1.3   Supplier Source Information

The Supplier Source Information section holds your source type and the identification information for the supplier. You can only view the information in this section.

SUPPLIER SOURCE INFORMATION

Source System		Identification No.
ASEED	▼	aseed123

3.1.4   Certifications

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:

CERTIFICATES (5)

Business Continuity Plan	FBI Identification Certificatio..	Audited Financials	Dun & Bradstreet
Type	Type	Type	Type
DIVERSITY	ISO - INTERNATIONAL STANDAR...	COI - CERTIFICATE OF INSURANCE	COI - CERTIFICATE OF INSURANCE
INACTIVE	**INACTIVE**	**INACTIVE**	**INACTIVE**
Compliance	Compliance	Compliance	Compliance
Non Mandatory	Non Mandatory	Non Mandatory	Non Mandatory

To update an existing certificate, click the certificate name, the Edit Certificate pop-up apperas.

For information on how to edit the certificate refer Adding a Certificate

3.1.4.1   *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**.
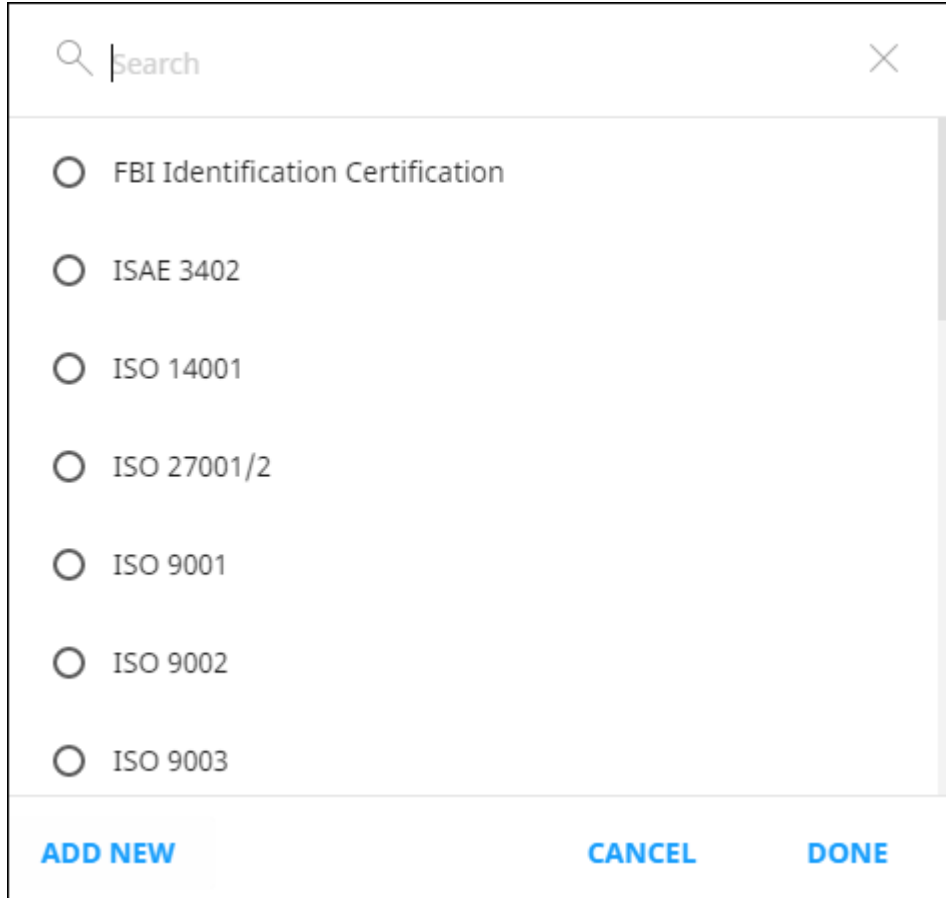
2) In case you want to add a new certificate other than the standard ones, click **Add New.**

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

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.


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.
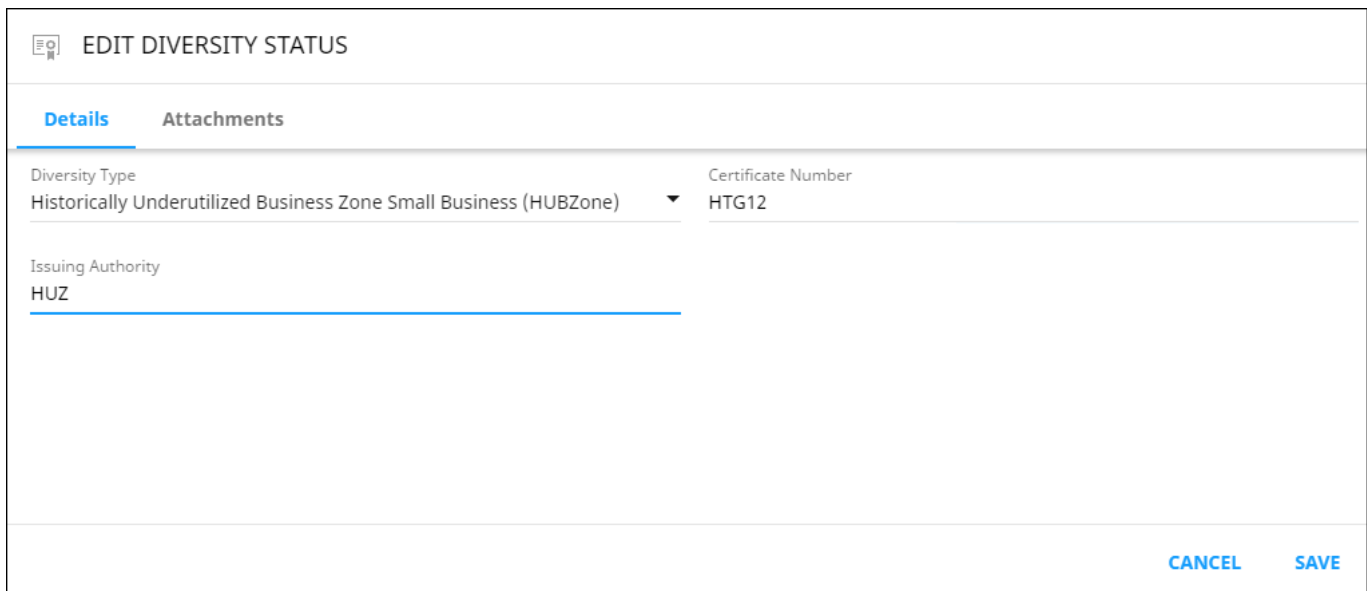

3.1.5 Diversity Status

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.

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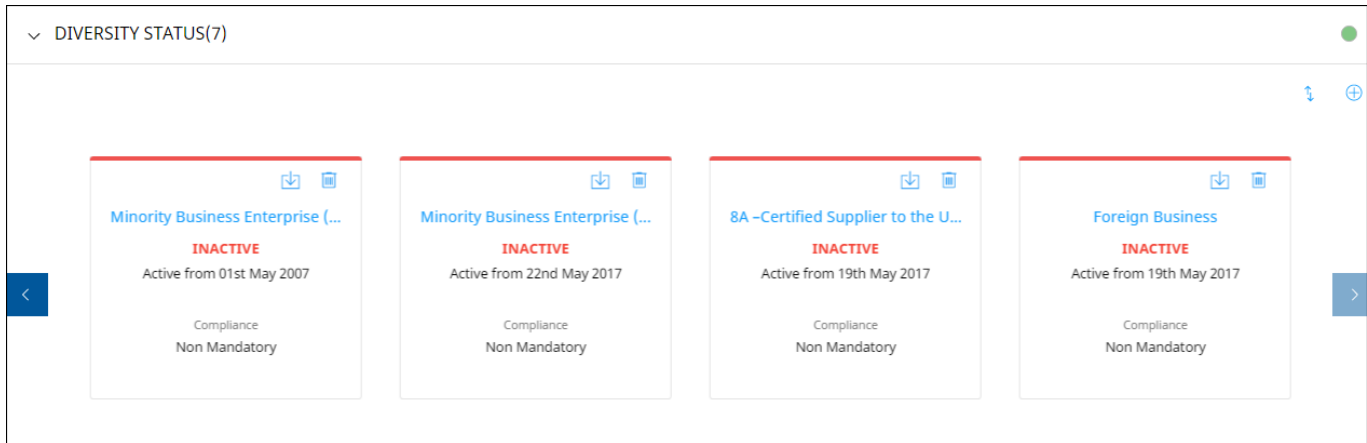
To update an existing diversity status, click the diversity status name, the Edit Diversity Status pop-up apperas.

On the Edit Diversity Status 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**.

3.1.6   Registration Information

The Registration Information section holds your response to the primary registration form. This is client configurable.

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

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REGISTRATION INFORMATION

Common KPIs

Questions

1 Questions | Created by AscenaRetail Admin on Apr 06,2017

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3.1.7 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 (6) - Table View

	Location Name	Type	Phone Nos.	Roles & Contacts		
☐	100 Walnut Ave	Headquarter	Pri : 7323826565 Sec :		📋	✏️
☐	Clark	Ordering Location	Pri : 7323826565 Sec : 7323826565	👥	📋	✏️
☐	Clark	Invoicing Location	Pri : 7323826565 Sec : 7323826565	👥	📋	✏️
☐	Clark	Other	Pri : 7323826565 Sec : 7323826565	👥	📋	✏️
☐	Mumbai Spend	Remit To Location	Pri : 2 Sec : 2	👥	📋	✏️
☐	Mumbai Tech	Ordering Location	Pri : 1 Sec : 1	👥	📋	✏️

Click [icon] *icon to change the view from table to map for vice versa.*

Note

▪ To delete the location details, select the location details and click Delete [icon] icon.

▪ To edit the location details, select the location details and click Edit [icon] icon. For more information refer Adding a Location

▪ To copy the location info, click Copy As [icon] 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] icon to update the role and contact information.

3.1.7.1 *Adding a Location*

To add a location:

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

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

c) On the Location pop-up, specify the required details on the Info and Identification Info 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.

3.1.8 Contact Information

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

CONTACT INFORMATION (2)

Full Name	Designation	Primary Phone No.	Region	Code
Paul Smith		1 - 1	UNITED STATES OF AMERICA + 50 more	CC-2017.000120
user name		12234 - 123	UNITED STATES OF AMERICA	CC-2017.000128

- 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 SMART by GEP.

- 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.

3.1.8.1   Adding Contacts

To add a new contact:

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

ADD NEW CONTACT

First Name

Last Name

E-mail Address

Designation (Optional)

Default Role

Primary Business Phone   Extn   Sec. Business Phone (Optional)   Extn   Mobile Number

Fax No.

CANCEL   SAVE

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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.*

3.1.9 Business Information

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

> **Note**
>
> ▪ The fields with cross [icon]icon are the optional fields and can be hidden if not required.
>
> ▪ Click on the Additional Fields [icon] icon on the top-right corner of each section to see a list of additional fields that you can add. Additionally, you can click the required additional field to toggle its display on each section.

3.1.10 Transaction Type

The Transaction Type section holds all the formats suppliers support for different transactions.

3.1.11 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:

3.1.12   Payment Terms

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

3.1.13   Documents

The Documents section displays all the documents associated with you such as contracts, scorecards, requisitions, and invoices. This provides details of all transactions associated to you. Use the filter to view documents of a type.

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