



## **SUPPLIERS ON-BOARDING USER MANUAL**

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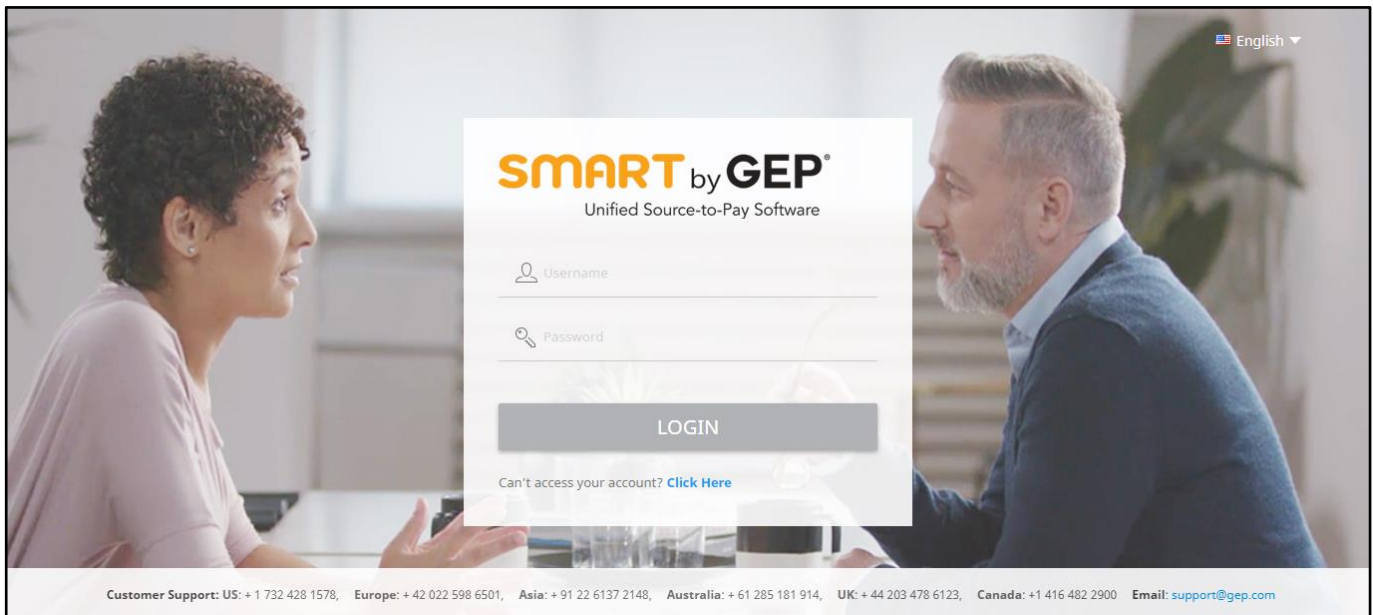
## Chapter 1: Getting Started

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

### 1.1 Logging into SMART by GEP<sup>®</sup>

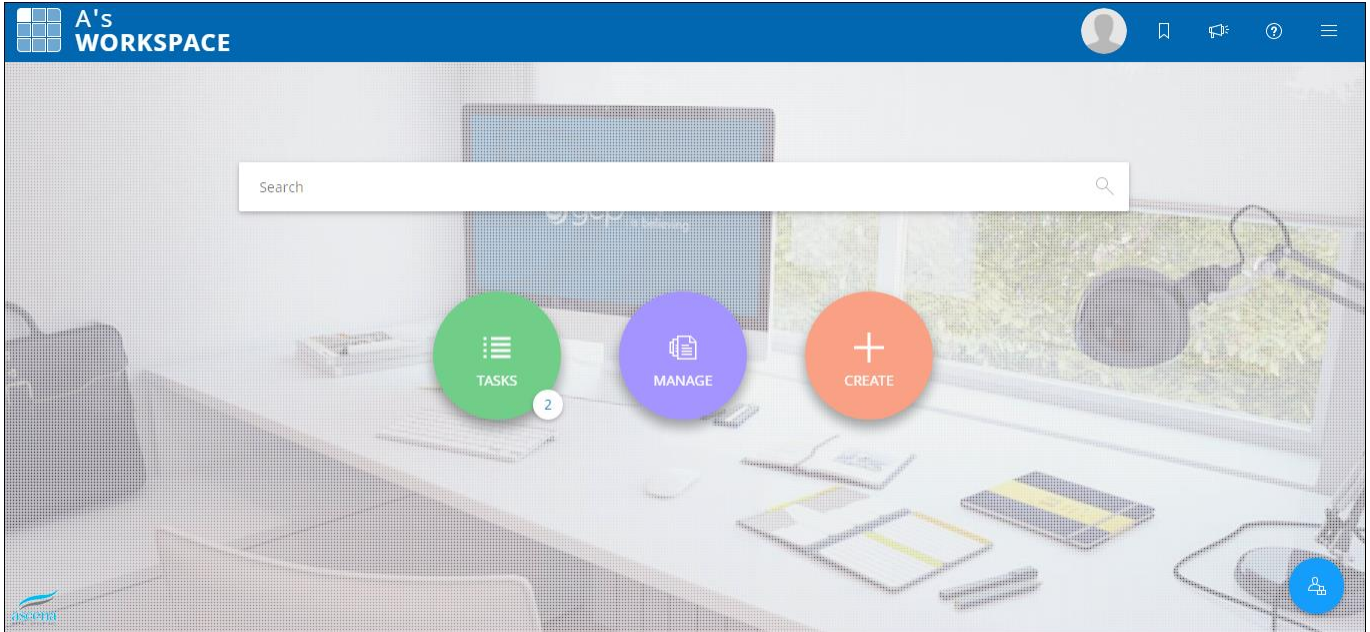
To log into SMART by GEP<sup>®</sup>, type your username and password, and click **Login**.





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

The Workspace home page is displayed as follows:

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## 1.2 Logging out of SMART by GEP<sup>®</sup>

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](mailto:Support@gep.com)

Regards,

GEP

*To Avoid emails going to spam or junk folders*

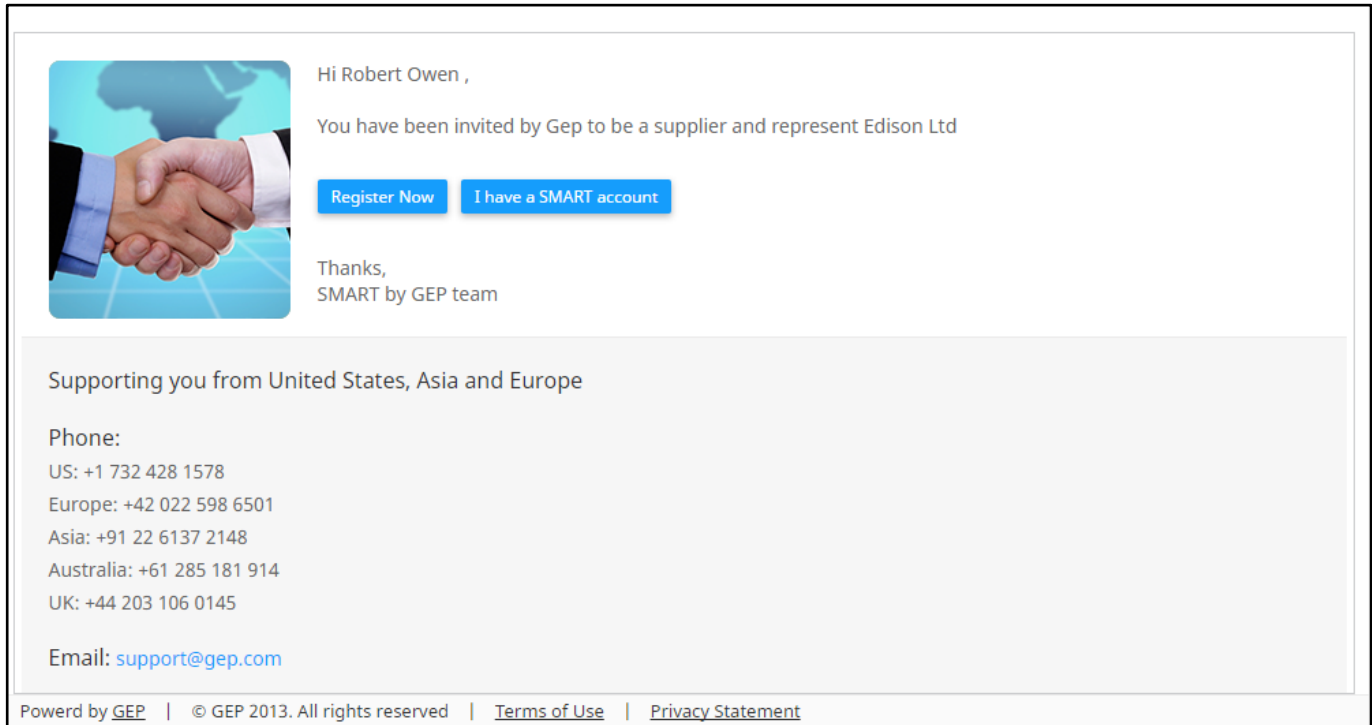
*To ensure you receive all emails from [support@gep.com](mailto:support@gep.com) in your inbox, please mark this email address as safe. Sender email address can be marked safe by adding it in the safe senders list, contacts list or your address book.*

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](mailto: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.

Primary Registration Form
Submit
Language English ▾

Basic Details
General Information tab
Basic Information

Previous
Next

Account Credentials

Username \*  ⓘ

User Email \*

Password\*  Password strength: Too short

Confirm Password\*

Company Information

Legal Company Name

Doing Business As

Company Website \*

Headquarter\*  ▾

Address Line 1 \*

Address Line 2

City\*

State/Province \*

Zip/Postal Code \*

Company Phone \*

Fax

Business Regions \*  ⓘ

- 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:

## SUPPLIERS ON-BOARDING USER MANUAL



### Congratulations!!!

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 and can now access SMART by GEP.

[Click Here](#) to login

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:**

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](mailto:support@gep.com)

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



### 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](mailto:support@gep.com)

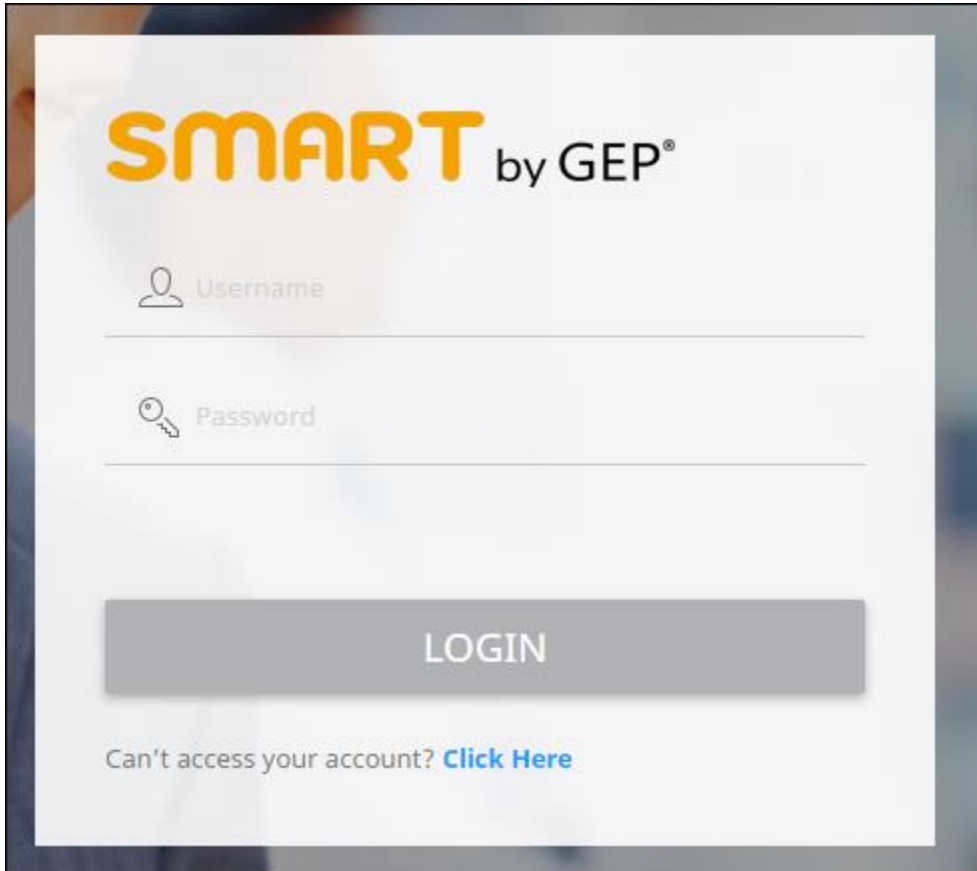
Powered by GEP | © GEP 2013. All rights reserved | [Terms of Use](#) | [Privacy Statement](#)

Once you verify your account the below screen appears:



 SUPPLIERS ON-BOARDING USER MANUAL

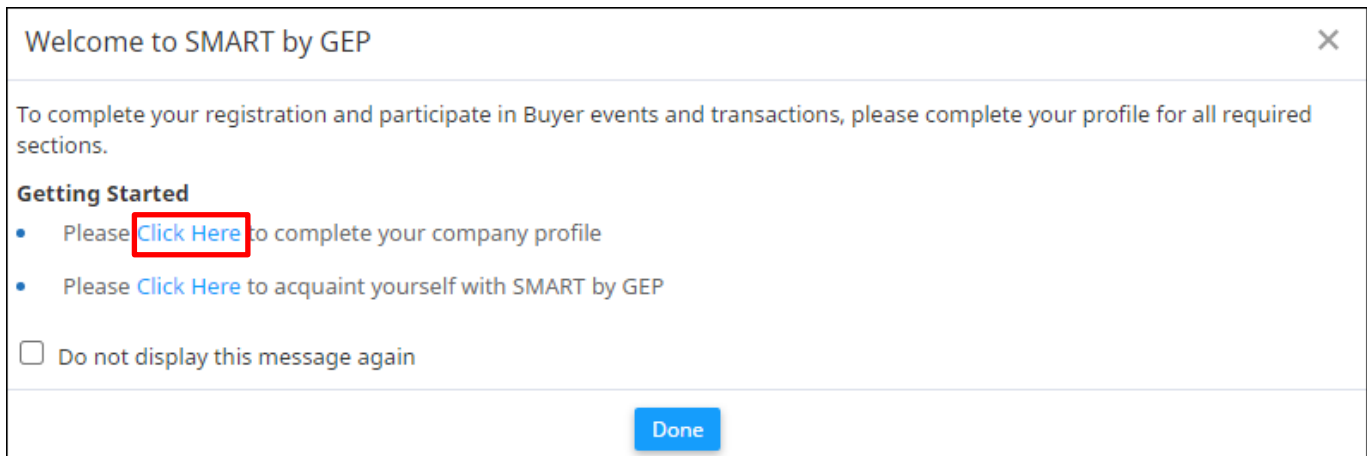
- 5) Click **Click Here** to login to GEP SMART system and complete your profile.  
You can login to the tool with the Username and Password created in the Primary Registration Form.



The screenshot shows the login interface for SMART by GEP. At the top, the logo "SMART by GEP" is displayed in orange and black. Below the logo are two input fields: "Username" with a person icon and "Password" with a key icon. A large grey button labeled "LOGIN" is positioned below the fields. At the bottom, there is a link that says "Can't access your account? [Click Here](#)".

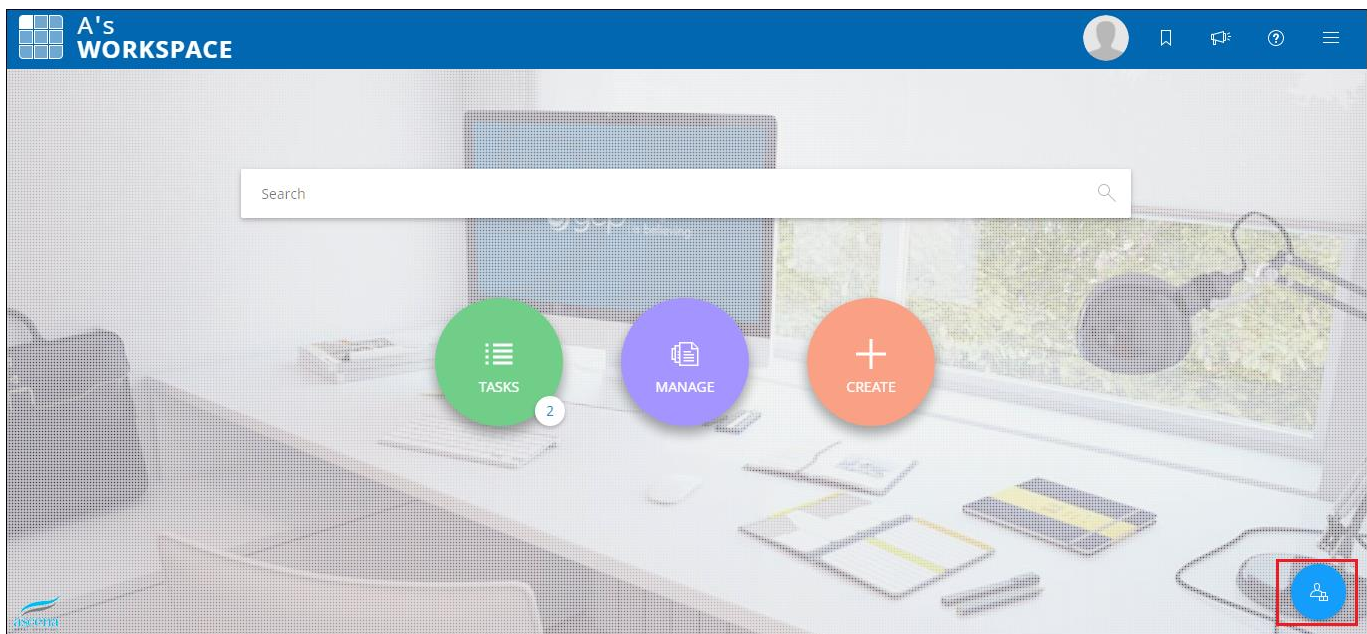
## Chapter 3: Profile Completion

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](#)

# SUPPLIERS ON-BOARDING USER MANUAL

- [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:

▼ BASIC DETAILS ●

	<p>Supplier's Legal Name supplier invited</p> <p>Doing Business As Supplier</p> <p>Supplier Managers Retail Admin</p>	<p>Parent Company's Identification type Parent Company Name</p> <p>Category Construction &amp; R&amp;M +3 More</p> <p>Status Registered</p>	<p>Parent Company Name --</p> <p>Region UNITED STATES OF AMERICA +1 More</p>
---	---	---	--


#### 3.1.1.1 Viewing the Parent Child Hierarchy

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

# SUPPLIERS ON-BOARDING USER MANUAL



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

Click ICARD  icon to view the supplier iCard.

The image shows a supplier iCard for Acme Inc. It features a red header with a white box containing the letter 'A'. Below the header, the company name 'Acme Inc' is displayed with a group of people icon, followed by 'New Jersey, United States', 'Status: Invited', 'Ph: 7323826565 | Fax: 7323826565', and 'https://https://acmeinc.com'. The main body of the card is white and contains the following information:

Owned By JOE Assets	Doing Business As Acme Industries
Supplier Code 1256445689	DUNS Number 987654321
Primary Contact Name first	Contact Email ID <a href="mailto:user@gsalkjsa.com">user@gsalkjsa.com</a>
Region	Category Corpora...
Diversity Status	

At the bottom, there are three boxes with blue circles and the numbers '0': 'Contract', 'Purchase Order', and 'Scorecard'. A 'CLOSE' button is located at the bottom right, and a chat icon is at the bottom left.

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.

# SUPPLIERS ON-BOARDING USER MANUAL

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 Certifications section displays all your certificates. The information is displayed on the Certifications section is as shown below:

▼ CERTIFICATES (5)

**Business Continuity Plan**

Type  
DIVERSITY

**INACTIVE**

Compliance  
Non Mandatory

**FBI Identification Certificatio..**

Type  
ISO - INTERNATIONAL STANDAR...

**INACTIVE**

Compliance  
Non Mandatory

**Audited Financials**

Type  
COI - CERTIFICATE OF INSURANCE

**INACTIVE**

Compliance  
Non Mandatory

**Dun & Bradstreet**

Type  
COI - CERTIFICATE OF INSURANCE

**INACTIVE**

Compliance  
Non Mandatory

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

EDIT CERTIFICATE

---

**Details**   Attachments

---

Certificate Name	Certificate Type
Audited Financials	COI - CERTIFICATE OF INSURANCE
Certificate Number	Issuing Authority
123123	ABC

---

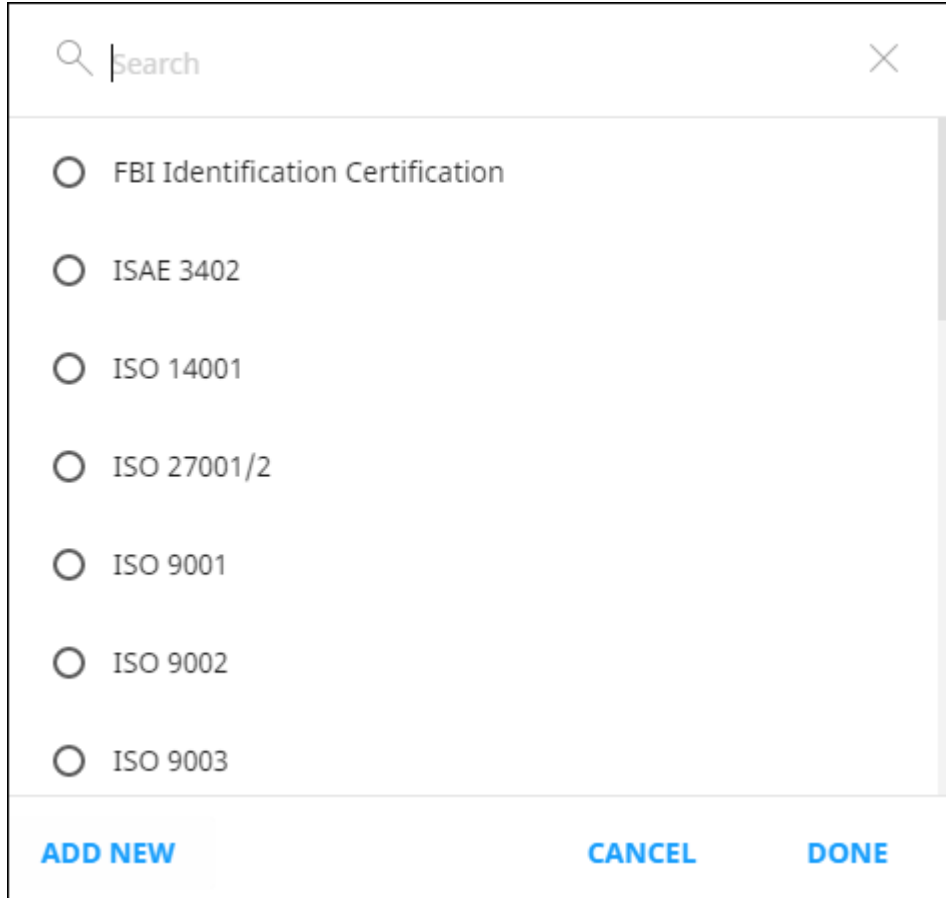
**CANCEL**   **SAVE**

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**.



NEW CERTIFICATE

Details
Attachments

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.



**Note**

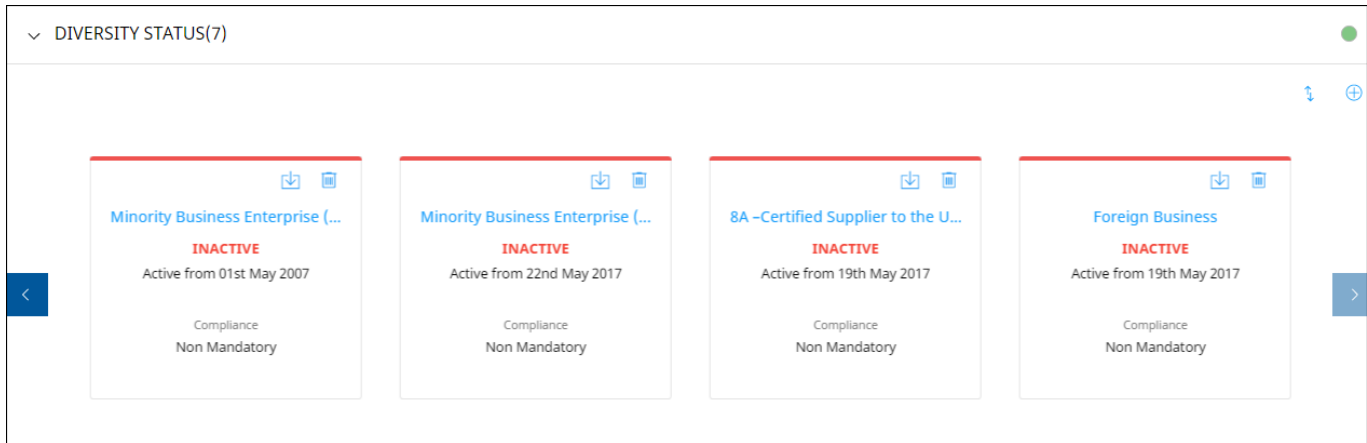
*Certificates can be configured to be mandatory for compliance. In such cases, once a certificate expires, your status changes to non-compliant and will only change back to the original status after a new certificate is uploaded.*

### 3.1.5 Diversity Status

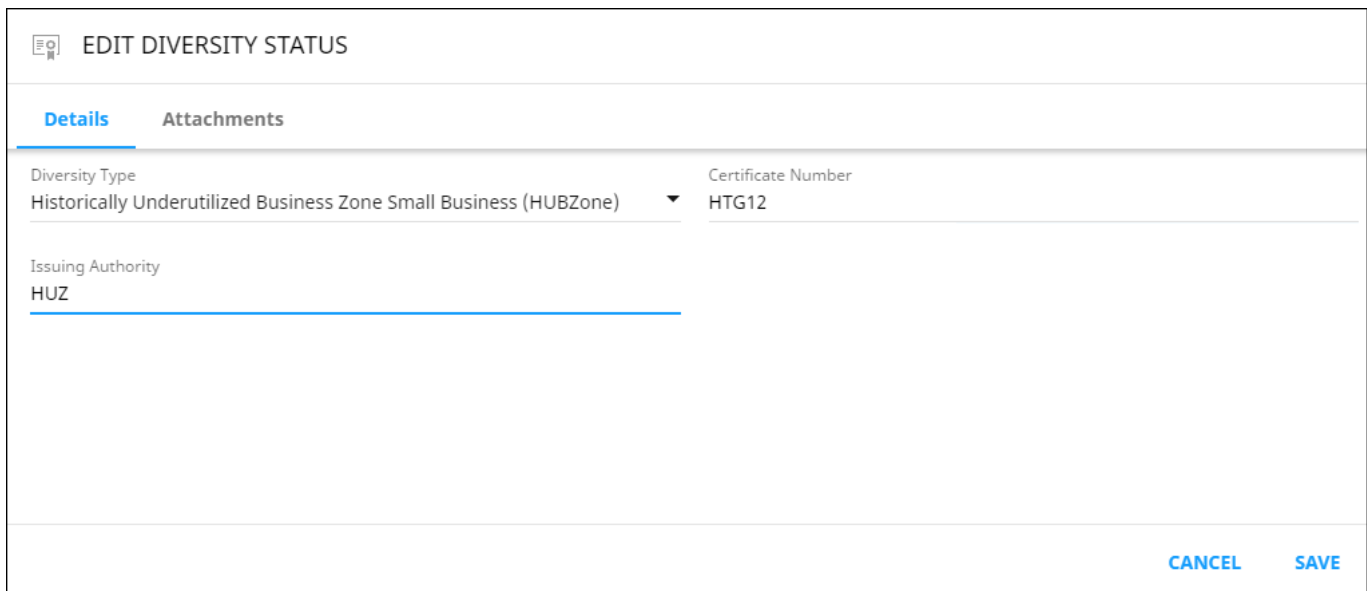
The Diversity Status section offers several benefits of working with diverse suppliers. The Diversity Status area helps you the buyer mark suppliers for their diversity.

To assign diversity status, on the Diversity Status section, locate and select the required diversity status.

# SUPPLIERS ON-BOARDING USER MANUAL



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:

# SUPPLIERS ON-BOARDING USER MANUAL

✓ REGISTRATION INFORMATION <span style="float: right;">●</span>
Common KPIs <span style="float: right;">🔍</span>
<a href="#">Questions</a> 1 Questions   Created by AscenaRetail Admin on Apr 06,2017
1-1 of 1

## 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 <span style="float: right;">🗑️ + ●</span>																																			
<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Location Name</th> <th>Type</th> <th>Phone Nos.</th> <th>Roles &amp; Contacts</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>100 Walnut Ave</td> <td>Headquarter</td> <td>Pri : 7323826565 Sec :</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Clark</td> <td>Ordering Location</td> <td>Pri : 7323826565 Sec : 7323826565</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Clark</td> <td>Invoicing Location</td> <td>Pri : 7323826565 Sec : 7323826565</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Clark</td> <td>Other</td> <td>Pri : 7323826565 Sec : 7323826565</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Mumbai Spend</td> <td>Remit To Location</td> <td>Pri : 2 Sec : 2</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>Mumbai Tech</td> <td>Ordering Location</td> <td>Pri : 1 Sec : 1</td> <td> </td> </tr> </tbody> </table>	<input type="checkbox"/>	Location Name	Type	Phone Nos.	Roles & Contacts	<input type="checkbox"/>	100 Walnut Ave	Headquarter	Pri : 7323826565 Sec :		<input type="checkbox"/>	Clark	Ordering Location	Pri : 7323826565 Sec : 7323826565		<input type="checkbox"/>	Clark	Invoicing Location	Pri : 7323826565 Sec : 7323826565		<input type="checkbox"/>	Clark	Other	Pri : 7323826565 Sec : 7323826565		<input type="checkbox"/>	Mumbai Spend	Remit To Location	Pri : 2 Sec : 2		<input type="checkbox"/>	Mumbai Tech	Ordering Location	Pri : 1 Sec : 1	
<input type="checkbox"/>	Location Name	Type	Phone Nos.	Roles & Contacts																															
<input type="checkbox"/>	100 Walnut Ave	Headquarter	Pri : 7323826565 Sec :																																
<input type="checkbox"/>	Clark	Ordering Location	Pri : 7323826565 Sec : 7323826565																																
<input type="checkbox"/>	Clark	Invoicing Location	Pri : 7323826565 Sec : 7323826565																																
<input type="checkbox"/>	Clark	Other	Pri : 7323826565 Sec : 7323826565																																
<input type="checkbox"/>	Mumbai Spend	Remit To Location	Pri : 2 Sec : 2																																
<input type="checkbox"/>	Mumbai Tech	Ordering Location	Pri : 1 Sec : 1																																



**Note**


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


- 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.

# SUPPLIERS ON-BOARDING USER MANUAL

## 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.

 ADD REMIT TO LOCATION

---

**INFO**    IDENTIFICATION INFO

---

Location Name Location Code *(Optional)*

Address Line 1 Address Line 2 *(Optional)*

City Country ▼

State Zip Code

Primary Business Phone *(Optional)*    Extn    Sec. Business Phone *(Optional)*    Extn

Default for Remit To Location **CANCEL**    **SAVE**

- 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:

# SUPPLIERS ON-BOARDING USER MANUAL

CONTACT INFORMATION (2)				
Full Name	Designation	Primary Phone No.	Region	Code
<input type="checkbox"/> Paul Smith		1 - 1	UNITED STATES OF AMERICA + 50 more	CC-2017.000120
<input type="checkbox"/> 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**

# SUPPLIERS ON-BOARDING USER MANUAL

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.

## 3.1.9 Business Information

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

▼ BUSINESS INFORMATION ☰ | ●



ANNUAL REVENUE

Currency: USD ▼      Annual Revenue (In Millions): 90

Average Profit (Percentage): 22 <span>✕</span>	Year of incorporation: 2017 <span>✕</span>	Business Type: Private Agency <span>▼</span> <span>✕</span>	Total No. of Employees: 1900 <span>✕</span>
<input checked="" type="checkbox"/> Supports P Card <span>✕</span>	<input checked="" type="checkbox"/> Auto-acknowledge Order <span>✕</span>	ERS Enabled: <input type="radio"/> Yes <input checked="" type="radio"/> No <span>✕</span>	



Note

- The fields with cross  icon are the optional fields and can be hidden if not required.
- Click on the Additional Fields  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.

▼ TRANSACTION TYPE ●

Auction format: cXML ▼      Contract format: Web ▼      Invoice format: EDI ▼      PO format: Web ▼      Rfx format: Web ▼

## 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.

# SUPPLIERS ON-BOARDING USER MANUAL

The information on the Marketing tab is displayed as shown below:

▼ **MARKETING INFORMATION** ●

Description *(Optional)*  
Acme industry is world class company

---

Supported Currencies Supported Languages *(Optional)*  
[US Dollar . USD +1 More](#) [English +1 More](#)

Current Customer

Exxon Kellogg Coca Cola

Website: <https://https://acmeinc.com> ↗
Facebook: [www.facebook.com/f.com](http://www.facebook.com/f.com) ↗

LinkedIn: [www.linkedin.com/l.com](http://www.linkedin.com/l.com) ↗
Twitter: [www.twitter.com/t.com](http://www.twitter.com/t.com) ↗

### 3.1.12 Payment Terms

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

▼ PAYMENT TERMS <span style="float: right;">●</span>	
Entity	Payment Terms
OU_DBN_US_The Dress Barn Inc	<a href="#">8%, NET 10 (Default) +2 More</a>
OU_DBN_US_The Dress Barn Inc	<a href="#">Standard Merchan... +1 More</a>
Corp	Standard Merchandise Term, 5,...

### 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.

▼ **DOCUMENTS** ●

Form ▼

---

Primary Registration Form  
PUBLISHED  
Created by: AscenaRetail Admin | Created on: Jun 29 2015

---

formvee  
PUBLISHED  
Created by: Emily Ross | Created on: May 03 2017