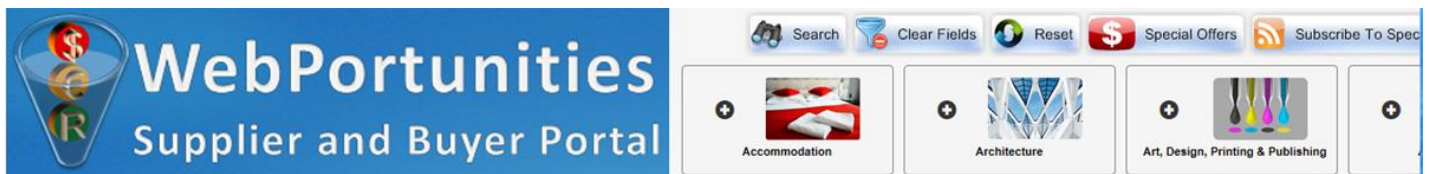# Managing Supplier Information on
www.webportunities.net

In most buyer organisations supplier's information and documents are managed manually. This is a very time consuming task and often documents have expired without the buyers' knowledge. And in these "manually managed" cases, the suppliers must submit the same documents repetitively. For example with the submission of every tender, a certain set of documents needs to be submitted by the suppliers. A huge filing activity is required.

In Tara Nawa this process is fully automated and the documents and other information are actually managed by the suppliers in the "clouds". When documents are due to expire, suppliers are notified. However in some cases supplies have not uploaded certain documents, or the documents have expired and not renewed. Fortunately Tara Nawa allows you to quickly find suppliers with missing documents after which you can seamlessly communicate (email or "Facebook" like Notification) with them without cluttering your own internal email server.
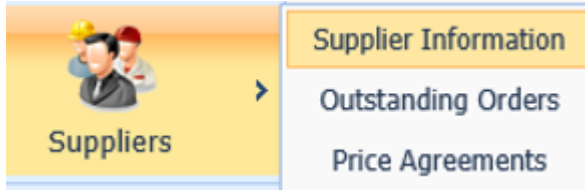
You can use the communication features for whatever purpose. This is especially useful when you want to send the same message to all suppliers.

Managing Supplier Information on www.webportunities.net

To manage Supplier Information, login and hover your mouse over the Suppliers Icon

and click Supplier Information to open the page as per the image below.

Using Filters

A filter can be applied on almost every column and there are various ways of applying a filter. Here are some examples. Click the Company dropdown. Then make your choices and click OK or Cancel.
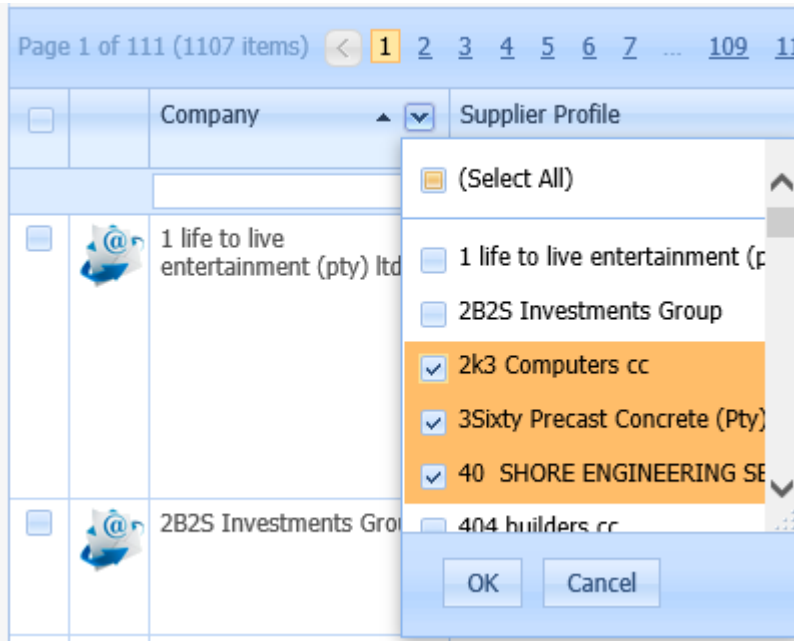
Click the small filter icon to the right of the filter window. "Contains" is selected by default, but the choice is yours. Then insert the text to search for in the filter window – see image below, and press enter.
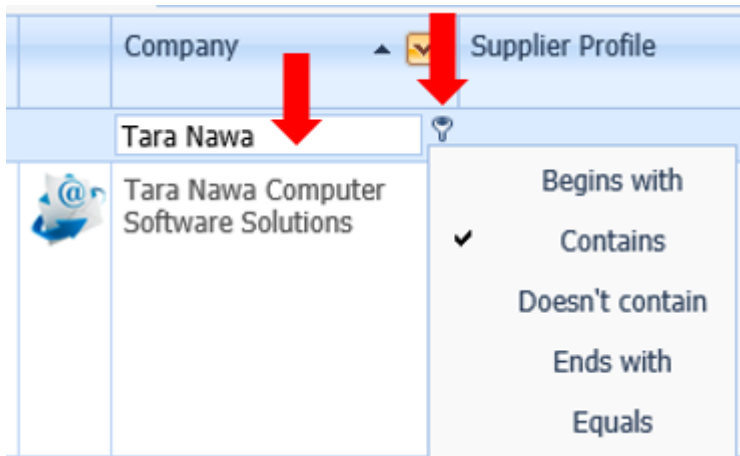
To remove a filter temporarily, uncheck the checkbox or check it to filter again. To remove all filters permanently, click "Clear" – see image below.
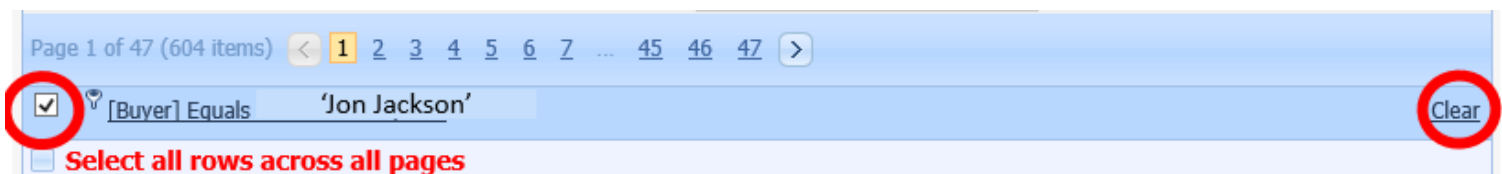
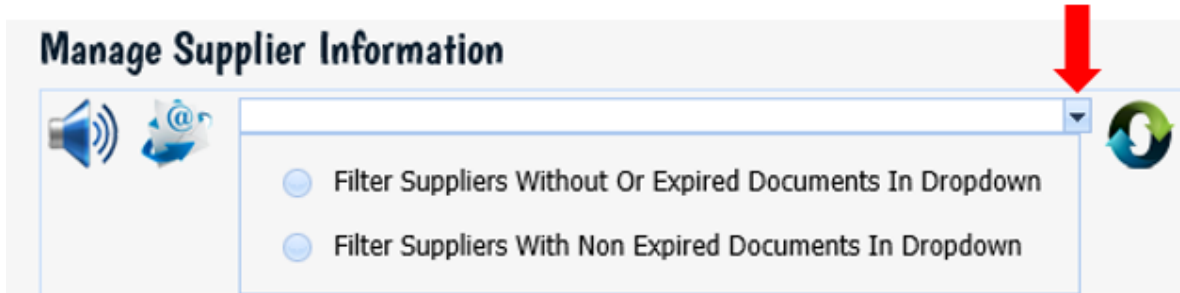You can also filter to find suppliers with or without non-expired documents. To do this click the dropdown as per image below and select the type(s) of documents to filter for. Once done, you can

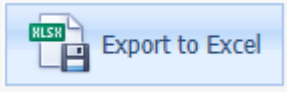remove this type of filter by clicking the reset icon .

Sorting

Simply click a column header to sort it in ascending or descending order.

Column size and position

Columns can be resized by simply dragging the column left or right border. Click and hold/drag a column to a new position if needed.

Exporting to Excel

Clicking will export all filtered records to MS Excel.

Updating your Supplier/Vendor Code on the website

Suppliers sign up on the website after which they can register with any Buyer. Upon registration with a Buyer, the Main Contact (administrator) in that Buyer Company will receive an email notification of the registration. The purpose of the email is to enable you to capture your own supplier/vendor code on the website for that supplier. That creates a cross reference between your own supplier code and the portal supplier code.

See image below. In the Action column, click on Edit, after which you'll be able to capture or change the Code. Once done, click on Update. The relevant supplier will receive an email notification of the change that you have made.

The system will keep track of all suppliers registered with a Buyer company, but for which a supplier/vendor code has not yet been assigned. A daily list is emailed to the Main Contact (administrator) for the Buyer Company.

During the evaluation of RFQ and Tender responses, the system will indicate whether or not a particular supplier is approved or non-approved. If the Buyer's supplier/vendor code is absent, the supplier will be flagged as non-approved and vice versa. In the case of a non-approved supplier, the system will not allow "business award" (purchase orders or contracts).

That cross reference between your supplier code and the website code (Supplier ID) is also important to ensure that the correct data from the Buyer's ERP system is displayed for a logged in supplier. For example downloading of Performance Profiles and Purchase Orders.

Because of the above, it is very important that the notifications about unassigned supplier codes are checked on a regular updates and action is taken where needed.

Communication - Sending emails - record level

On record level click this icon. An email form as below will open. You have the following options:

- Change the email address of the main recipient (To Email Address).
- All other contacts for the relevant supplier are CC'd. You can uncheck here if needed.
- The Subject contains nothing; you need to insert that.
- The Message Body contains a default message with the logged in user's name at the bottom. This message can be changed if needed. It is recommended not to remove the sentence "Don't reply to this system generated email."
- A document in PDF or ZIP format can be attached.

- When done, click on Send email. Alternatively just close the window by clicking .
- Note that you can also send an email to suppliers not registered on www.webportunities.net.

Fields with * indicates required field.

* To Email Address:	elmo@taranawa.com
CC Email Address:	☑ Christian Erasmus (christian@taranawa.com)
	☑ Elmo Erasmus (elmo@taranawa.com)
	☑ Elmo Jr Erasmus (elmoj@taranawa.com)
* Subject:	Uploading Documents
Attachment:	Browse...

Click to Upload on server

Allowed types: pdf, zip
Maximum file size: 1Mb

* Message Body:

Don't reply to this system generated email.

Regards

Alta Bezuidenhout

Send eMail

Communication - Sending emails - header level

If you want to send the same email to multiple suppliers, you can apply filters of choice. Once done you can select suppliers by clicking the checkboxes in the records. Alternatively you can select/unselect the checkbox in the Header (see image below) which will select/unselect all records on the current page. If you want to select all suppliers on all pages, check/uncheck the checkbox to the left of "Select all rows across all pages".

Once you are done with your selections, click this icon [icon] in the Header. Make changes in the Subject and Message body if needed. A file of PDF or ZIP format can be attached. Then click Send Email or Cancel, or just close the form. The email will be sent to all selected suppliers (even those who are not registered on www.webportunities) and all addiontal contacts on the database.

Send Email

Send To:	All selected suppliers
Subject:	Foskor Phalaborwa - Feedback required for open purchase orders
Message Body:	Please provide feedback on all open purchase orders on our website at www.webportunities.net . Don't reply to this system generated email. Regards Ami Hugo

Send Email   Cancel

Communication - Sending notifications - header level

An alternative to email is sending a notification by clicking this icon 🔊 in the Header. But before you do that, filter and select your suppliers as described above and then click that icon. The form below will appear. You'll get a message at the top about how many recipients are due to receive your notification.

You need to insert your message. Once done, click OK or Cancel.

Send Notification

The notification below will be posted to 10Supplier(s). Click OK to continue else Cancel.

OK   Cancel

Each supplier selected will receive:

1. An email warning him about the existence of a Notification on www.webportunities.net with a hyperlink to take him to the website.

2. When the supplier logs in on the website, he'll see this . And when clicking that icon, he will see his notification(s) as below.

3. Notifications will only work for suppliers who are registered with the buyer on the website.
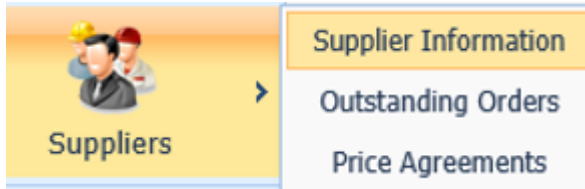
Notifications

Attention: Elmo Erasmus
Please provide feedback on all your open purchase orders on this website!
Posted: 29 Aug 2015, 15H14

Mark as read ○

See All

Supplier Profile

We have aimed to make us much as possible information available about suppliers. A lot of information is available on the "Manage Supplier Information" page which opens when you click on "Supplier Information.

However, clicking on the links in the "Supplier Profile" column, the page below will open will plenty of other information, including Ownership and Financial Information. See image below.

Similar information is available in the Business Directory of the website. But "Banking Details, Ownership and Financial Information and Performance Profiles are only available to a logged in buyer with whom a supplier is registered.

Tshwane Cables PTY Ltd

| Company Profile | Contact Details | Branches | Documents | Material Groups/Services | Brand Names | Banking Details | **Ownership and Financial Info** | Performance Profile |

Company Is Registered For VAT:	**True**
VAT Registration Number:	**4790222444**
Tax Reference Number:	**9822049145**
Number Of Full Time Employed Staff:	**29**
Annual Turnover:	**1000000**
Asset Value (excluding fixed property):	**3500000**
Percent Owned Black Male:	**20**
Percent Owned Black Female:	**10**
Percent Owned Black Youth:	**10**
Percent Owned White Female:	**0**
Percent Owned Disabled Persons:	**0**
BBBEE or TESEF Rating (or similar):	**1**
BBBEE or TESEF (or similar) Certificate Number:	**FX5786-010415**
BBBEE or TESEF (or similar) Rating Company:	**FINXBEE**

End…