ASGC

ProjectVIEW ERP
Cost Monitoring Solution

Vendor Web Interface for Registration & submitting Quotations

This section describes how a vendor can register, review his received Requests for Quotation, derive Quotations from them and submit them to the contractor via ProjectVIEW. The entire process is completed through ProjectVIEW's web portal.

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Introduction

Each time a ***Request for Quotation*** is sent to a vendor, that particular vendor will receive an email advising that such a request has been received. The email will also contain a clickable link to ProjectVIEW's web portal.

The web portal can also be accessed using any browser using the following web address:

http://eprocurement.asgcgroup.com/

The web portal contains all the active Requests for Quotations sent to the vendor. The vendor can review them and submit his own Quotation back to the company.

Step 1: Log in screen

The first screen that will welcome a vendor to ProjectVIEW's web portal is the Log in screen:

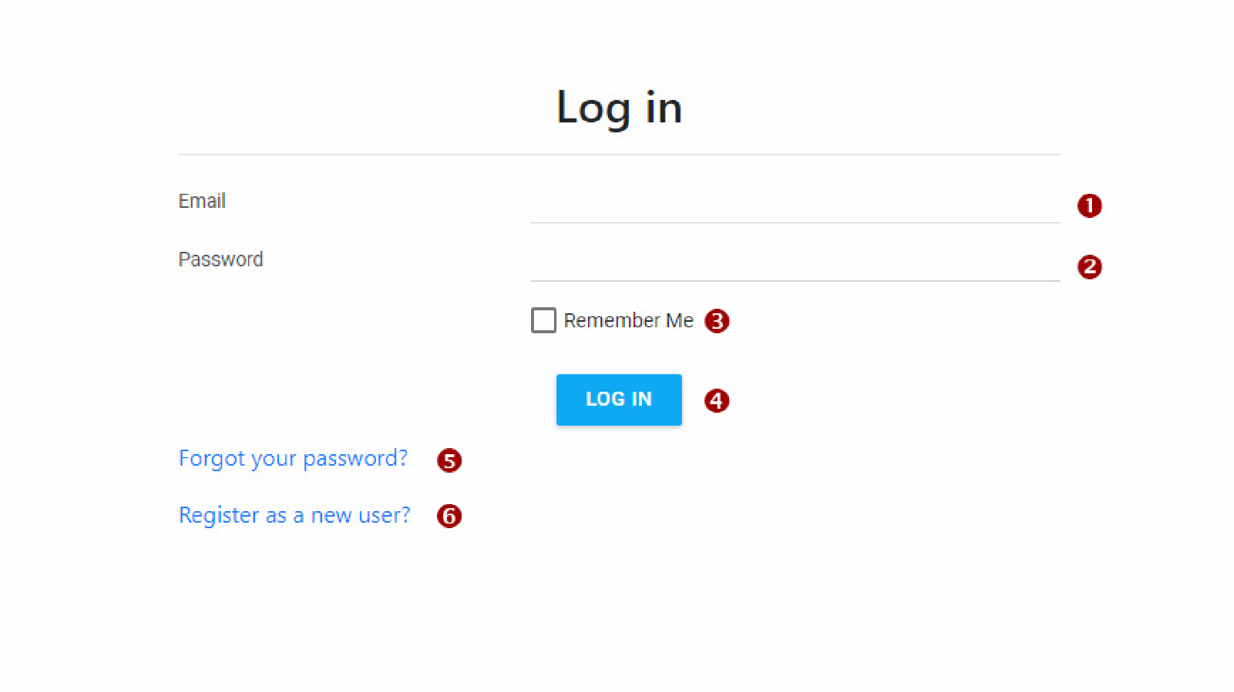

Figure 1 – Log in screen

To access his personalized area, the vendor has to:

1. Fill in his email (1)
2. Fill in his password (2)
3. Click the "LOG IN" button (4)

Note

- ✓ By clicking on the "Remember Me" check box (3), the vendor can toggle whether he would like his information to be stored on this particular computer for future use.
- ✓ By clicking on "Forgot your password?" (5), the vendor can request to reset his old password. In the next screen, his email will be requested in order for the system to begin the reset procedure for this account.
- ✓ By clicking on "Register as a new user?" (6), a new vendor can provide his information to become a registered vendor. See.New User Registration

Step 2: Main Screen

Having successfully logged in, the vendor will be now presented with the web portal's main screen:

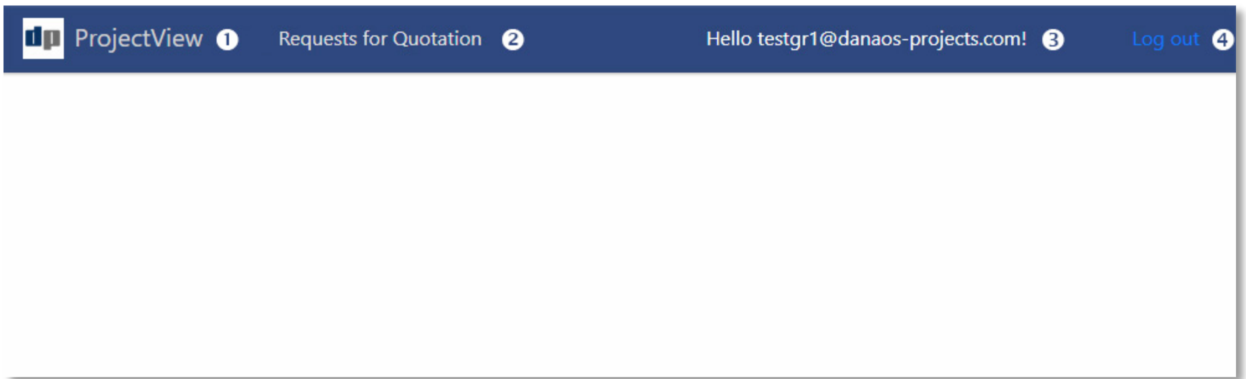

Figure 2 – Main Screen

- ✓ By clicking on "ProjectVIEW" (1) at any time and from any screen, the vendor can return to this screen.
- ✓ By clicking on "Requests for Quotation" (2), a list of Requests for Quotation will be loaded (see Step 3: Review Requests for Quotation).
- ✓ By clicking on "Hello …" (3), a vendor can manage his account (e.g. to change his password etc).
- ✓ By clicking on "Log out" (4), the vendor is logged out and returned to the Log in screen (see Step 1: Log in screen)

Step 3: Review Requests for Quotation

Having clicked on "Requests for Quotation" (**RFQ**) in the main screen, the vendor is presented with the following screen with a list of Requests for Quotation:

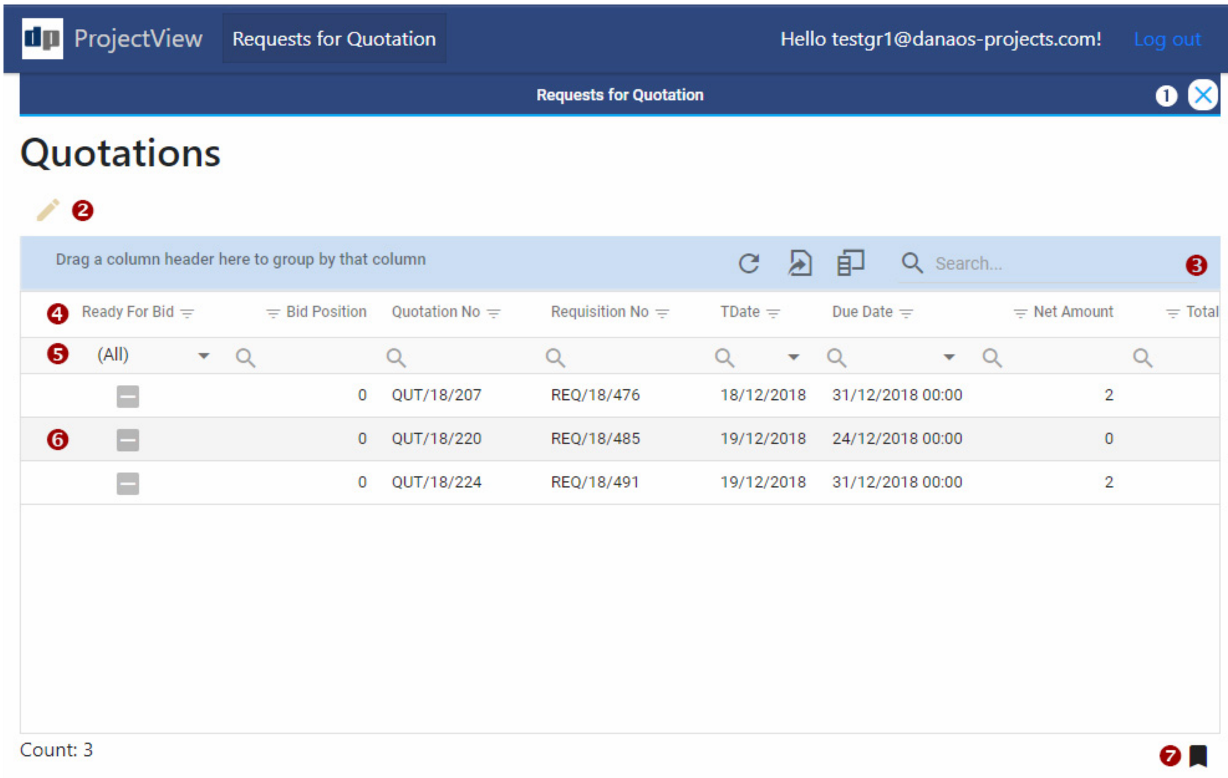

Figure 3 –Received Quotation Screen

1. Close button. By clicking the "X" in the upper right corner, the vendor can return to the main screen.
2. Edit Button. By clicking on the pencil **AFTER HAVING SELECTED** a quotation, the selected quotation is displayed on screen. Please see Step 4: Edit Quotation
3. Utility Bar. Contains a number of helpful options for managing the list of RFQs.
4. List Column Headers
5. List Column Filters
6. List of RFQs. Select row and press the Edit Button to display the selected quotation.
7. Save Column Configuration. Saves the list and state of visible columns.

Utility Bar

The utility bar contains the following buttons:

	Refreshes the list of RFQs
	Exports a single or multiple rows from the list
	Brings the “Column Chooser” widget which allows the vendor to select which columns will be visible in the list
	Searches the list for a specific value

Further to the aforementioned buttons, a vendor can drag and drop a header from the RFQ list to any location on the Utility Bar in order to group or filter the list by that column. To remove the grouping or filter, the user has to simply drag and drop the Header back to the RFQ list.

Column Headers

The Column Headers in this screen (as well as in any other screen in the web portal) are similar in functionality to those found in any datasheet management software. Specifically:

- ✓ Clicking on a Header sorts the RFQ list by that column in ascending or descending order. Please note that if a column is used for sorting, an arrow will be shown on its Header next to its text.
- ✓ Clicking on a Header’s filter symbol ( ) displays a new selection box which the vendor can use to filter the RFQ list. Please note that if a filter is applied in this fashion, the aforementioned symbol turns blue. To remove the filter, the vendor simply has to click on the symbol and remove the filter conditions.
- ✓ A vendor can drag and drop a Column Header before or after another Column Header to move that specific column.
- ✓ A vendor can also resize a column by placing the mouse pointer just between two consecutive Column Headers. The mouse pointer will turn into a double arrow allowing the resize of the column by dragging the mouse sideways.

Furthermore, as described in the previous section of this manual, a Header can be used to group or filter the RFQ list (See. Utility Bar).

Column Filters

Just below each column Header, a magnifying glass can be found. A vendor can click next to it to the filter icon and type some text in to filter the RFQ list. By clicking on the icon itself, a vendor can select a number of filtering options (Contains, Starts with, Equals etc.). These options are used in conjunction with the text a vendor enters next to the icon in order to filter the RFQ list.

Step 4: Edit Quotation

After selecting a RFQ from the list and pressing the Edit button, that particular RFQ will be displayed. Each RFQ screen comprises of the following tabs:

- ✓ Basic Data
- ✓ Quotation Detail
- ✓ Evaluation Criteria
- ✓ Contractor Documents
- ✓ Supplier Documents

Edit Basic Data

In this screen, the basic information for a RFQ are displayed including quotation dates etc.

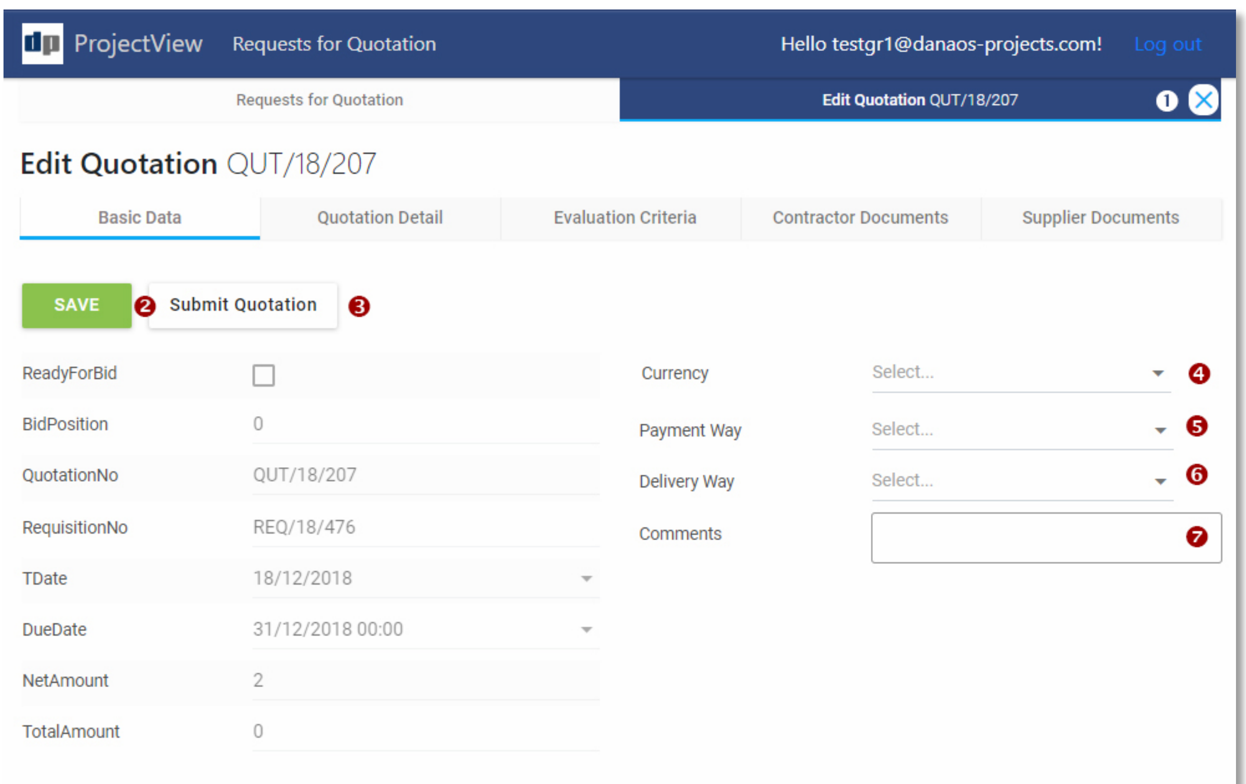

Figure 4 –Basic Data Tab

The following options are available to a vendor:

1. Close button. By clicking the “X” in the upper right corner, the vendor can return to the main screen.
2. Save button. Saves any changes made by a vendor.
3. Submit Quotation button. Sends all the information entered by a vendor in all screens relevant to this quotation.
4. Currency drop-down menu. Allows a vendor to change (not mandatory) the currency for this quotation.
5. Payment Way drop-down menu. Allows a vendor to select a payment method.
6. Delivery Way drop-sown menu. Allows a vendor to select a delivery method for the items quoted in this quotation.
7. Comments. Allows a vendor to add comments relevant to the entire quotation.

Note

- ✓ The “Submit Quotation” button should **ONLY** be pressed **AFTER** the vendor has finalized his quotation and filled in all prices, quantities, documents etc.
- ✓ The comments entered in this screen refer to the **ENTIRE** quotation. Comments regarding specific items within the quotation can be added later. Please see Step 5: Fill in Quotation Details

Fill in Quotation Details

In this screen, a vendor can find all the BOQ items contained in this quotation. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.

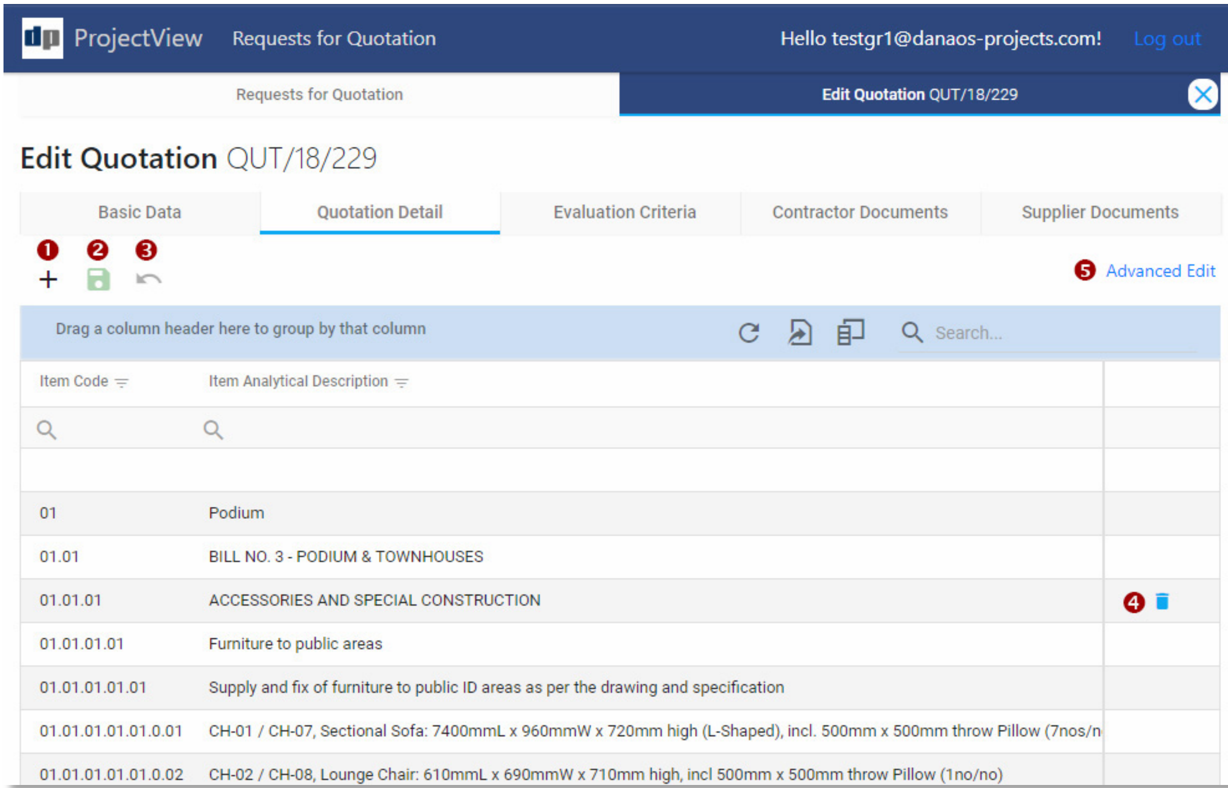

Figure 5 - Quotation Detail Tab

1. A vendor can also add additional items by clicking on the "+" button (1) on the top left corner of the list. A new first row will appear in the list where a vendor can add all necessary fields.
2. The save button (2) has to be clicked in order to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert **ALL** changes.
4. After an additional item has been saved, it can be deleted with this button (4).
5. To show further columns, the "Advanced Edit" (5) toggle can be enabled.

Note

✓ Most of the cells in the list can be edited and filled-in with values and prices. Please note that some cells are locked as they contain the contractor's original values.

Check Evaluation Criteria

In this screen, a vendor can find all the Evaluation Criteria set by the contractor for this quotation. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.

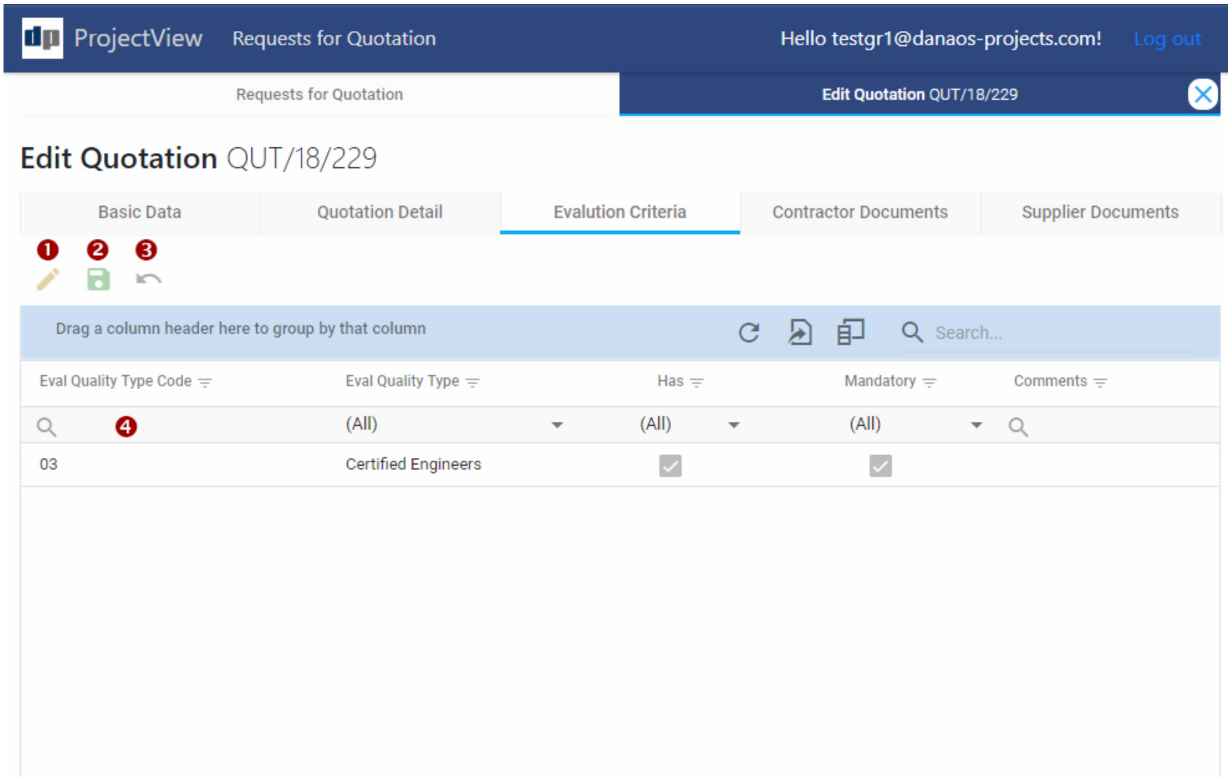

Figure 6 - Evaluation Criteria Tab

1. In order for a vendor to edit (check/uncheck) an evaluation criteria, the vendor has to first select the evaluation criteria in question, and to consequently click on the edit button (1) on the top left corner of the list.
2. Having finished editing the evaluation criterion, the save button (2) has to be clicked in order to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert changes.

Access Contractor Documents

In this screen, a vendor can find links to all the documents attached by the contractor for review by the vendor. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.

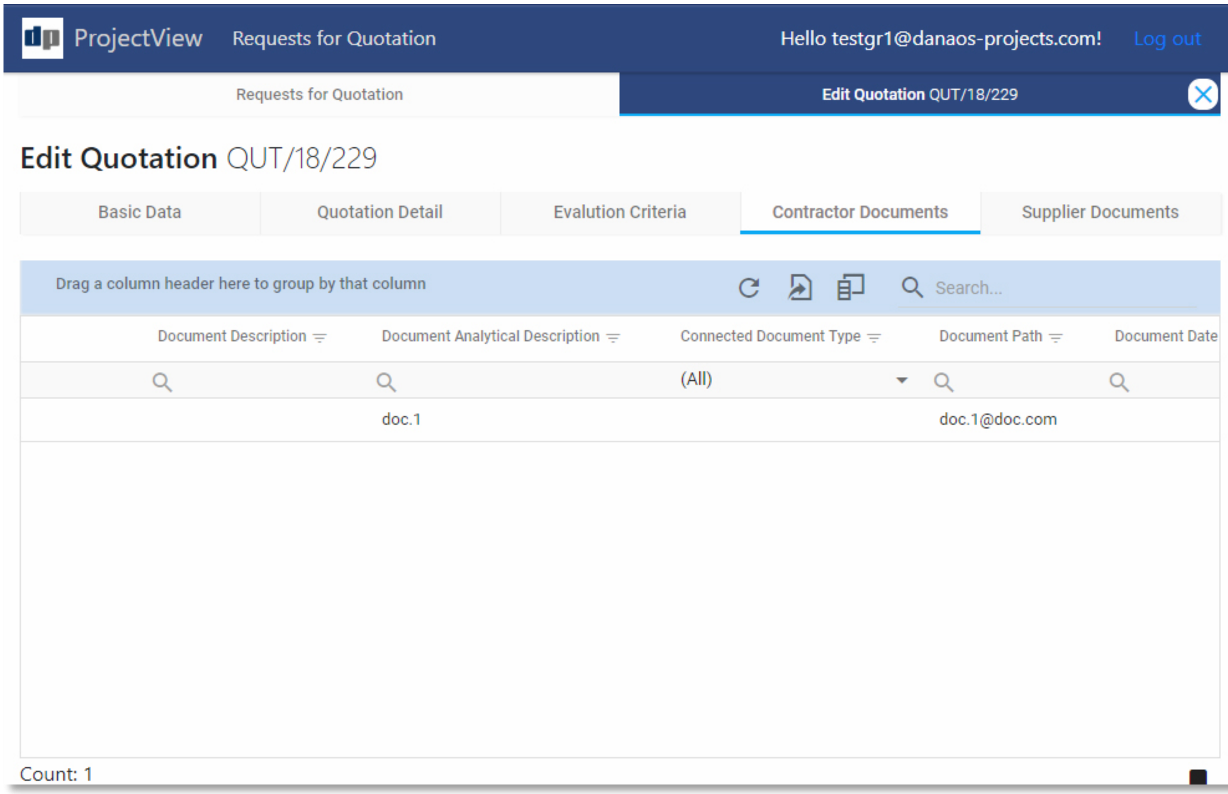

Figure 7 - Contractor Documents Tab

Provide Additional Documentation

In this screen, a vendor can attach one or more documents which he deemed necessary for review by the contractor. The list's functionality is the same as the one found in the main screen. Please refer to Step 3: Review Requests for Quotation, Utility Bar, Column Headers and Column Filters for further information.

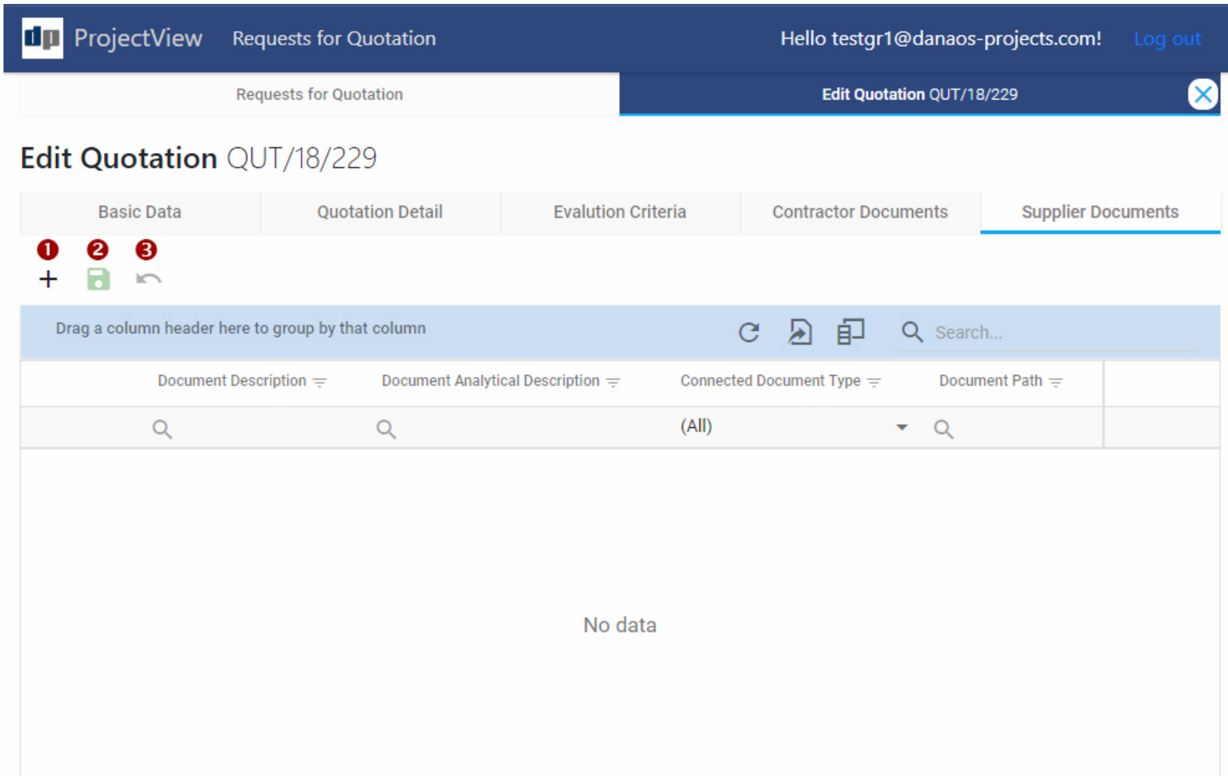

Figure 8 - Supplier Documents Tab

1. In order for a vendor to add a document, the vendor has to first add a new row in the list by clicking on the "+" button (1) on the top left corner of the list.
2. Having finished adding the document, the vendor has to click on the save button (2) to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert changes.

Note

✓ Any document added by a vendor have to be on a cloud location (e.g. Google Drive, Dropbox etc.). The vendor can copy and paste the document's location in the column "Document Path" inside the list.

New User Registration

Step 1 – Initial Registration

To register as a new vendor, please fill in all the necessary information and press the “Register Button” (1).

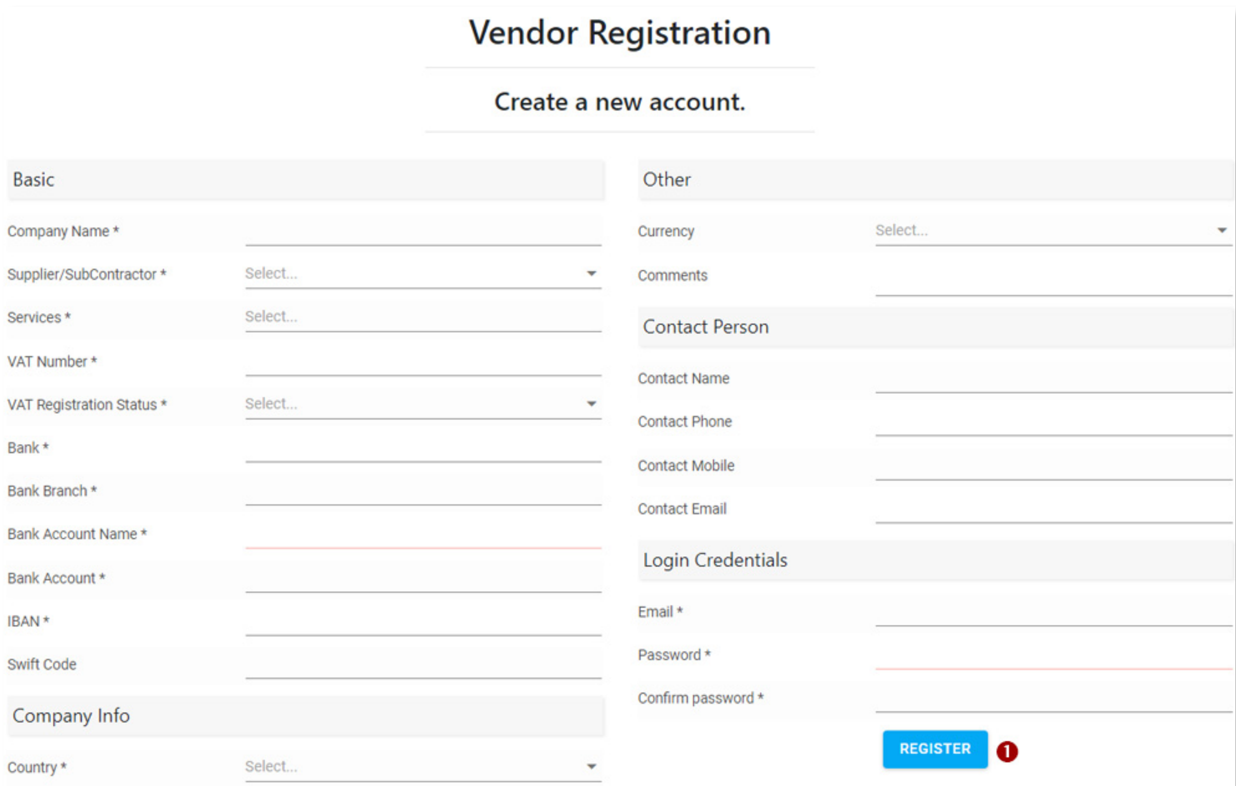

Figure 9 - New Vendor Registration

Having completed the registration process, you will be transferred to your personal area within the web portal. Please see. Step 2 – Additional details for further details. You will also receive an email requesting you to verify your email address.

Note

Some of the fields are mandatory. These fields are denoted by an “*”. If you do not fill in the information required in these fields you will not be able to register as a new vendor.

Step 2 – Additional details

Following your successful initial registration, you will become a “Candidate Vendor”. Your registration can only be completed once you provide the additional information described in this section. Once this information is submitted, your application will be reviewed from ASGC and you will be notified on the status of your application.

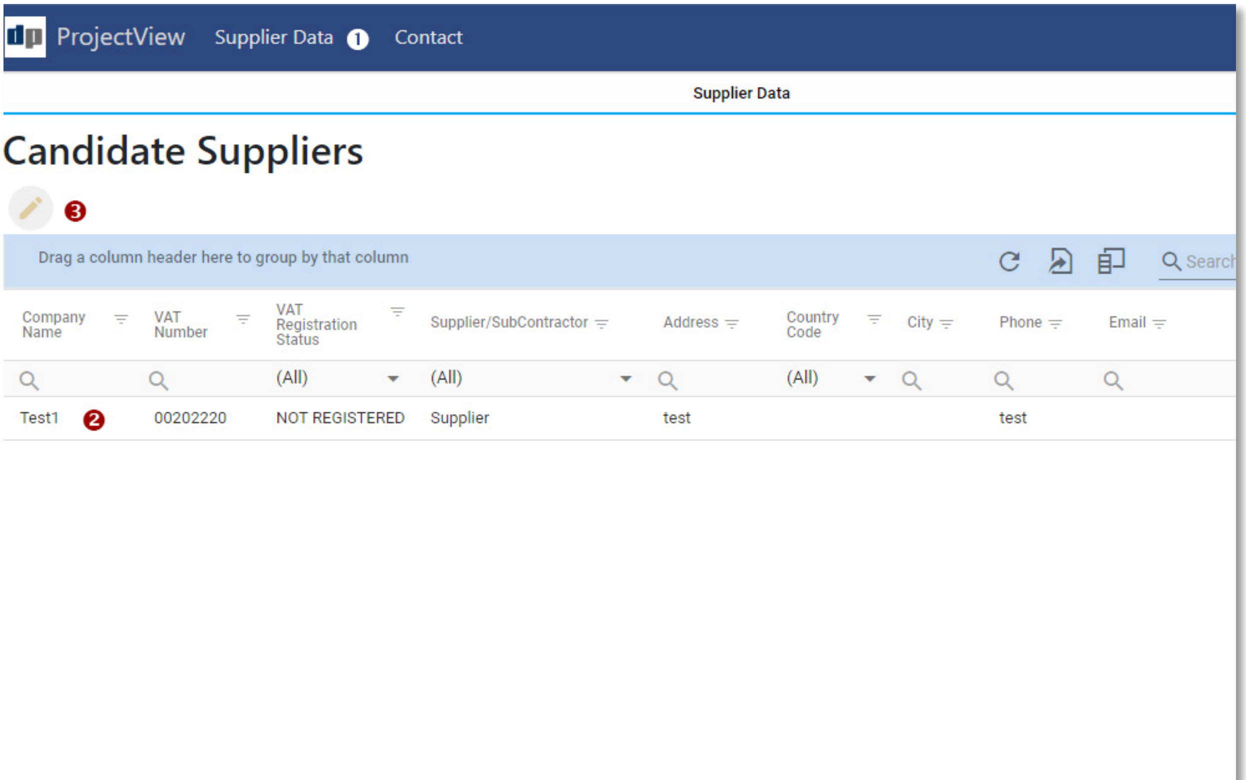

Figure 10 - Vendor Data

To enter the additional data:

1. Click on the “Supplier Data” (1) button which will display your saved data.
2. Select your data by clicking on it (2).
3. Click on the “Edit” button (3).

A new screen will be displayed, composed of 4 new tabs:

1. Basic Data
2. Services or Categories
3. Past Projects
4. Connected Documents

Step 2a – Basic Data

This tab displays all the information already entered during registration.

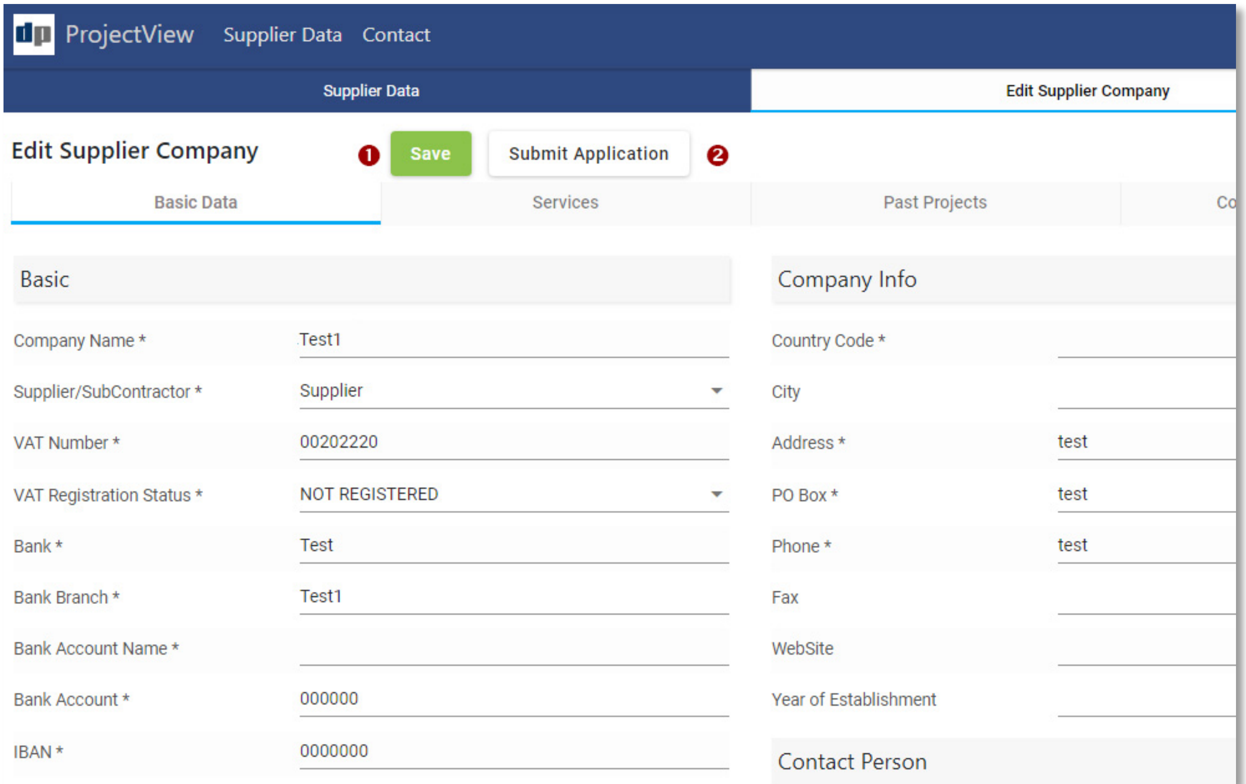

Figure 11 - Vendor Basic Data

1. To save any changes, the vendor can click on the "Save" button (1) at any time.
2. To submit the changes and begin the process of evaluation of the application by ASGC, the vendor can click on the "Submit Application" button (2).

Note

If any of the mandatory fields from this or any other tab are missing, a message will be displayed. The submission of the application cannot proceed if these fields are not complete.

Step 2b – Services/Categories

This tab displays the services a subcontractor can provide or the categories of materials a supplier can provide.

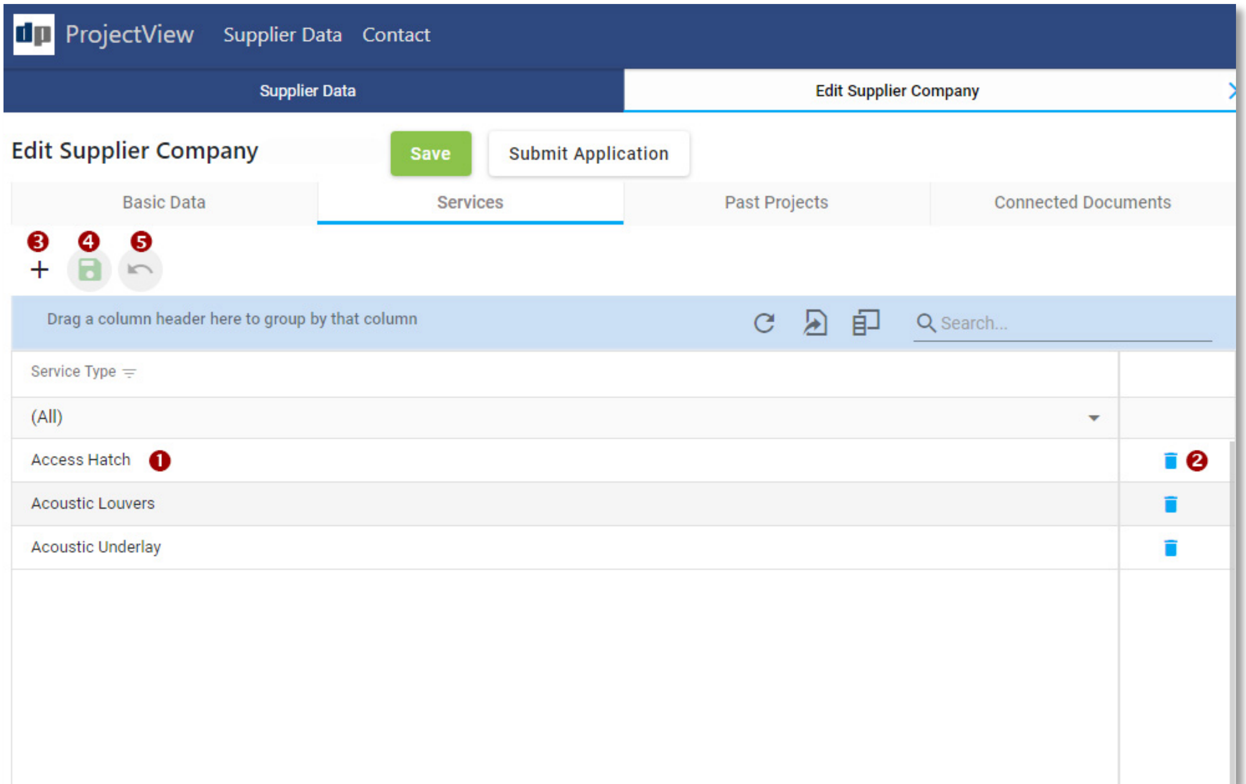

Figure 12 - Vendor Services/Categories

The vendor can:

1. Edit a service/category (1)
2. Delete a service/category (2)
3. Add a new service/category (3)
4. Save any changes (4)
5. Undo any changes (5)

Note

If a vendor is both a supplier and a subcontractor, 2 tabs will appear instead of 1; one for the services and one for the categories

Step 2c – Past Projects

This tab allows the addition of any projects completed by the vendor in the past. These are provided as a reference and are extremely important for the evaluation process

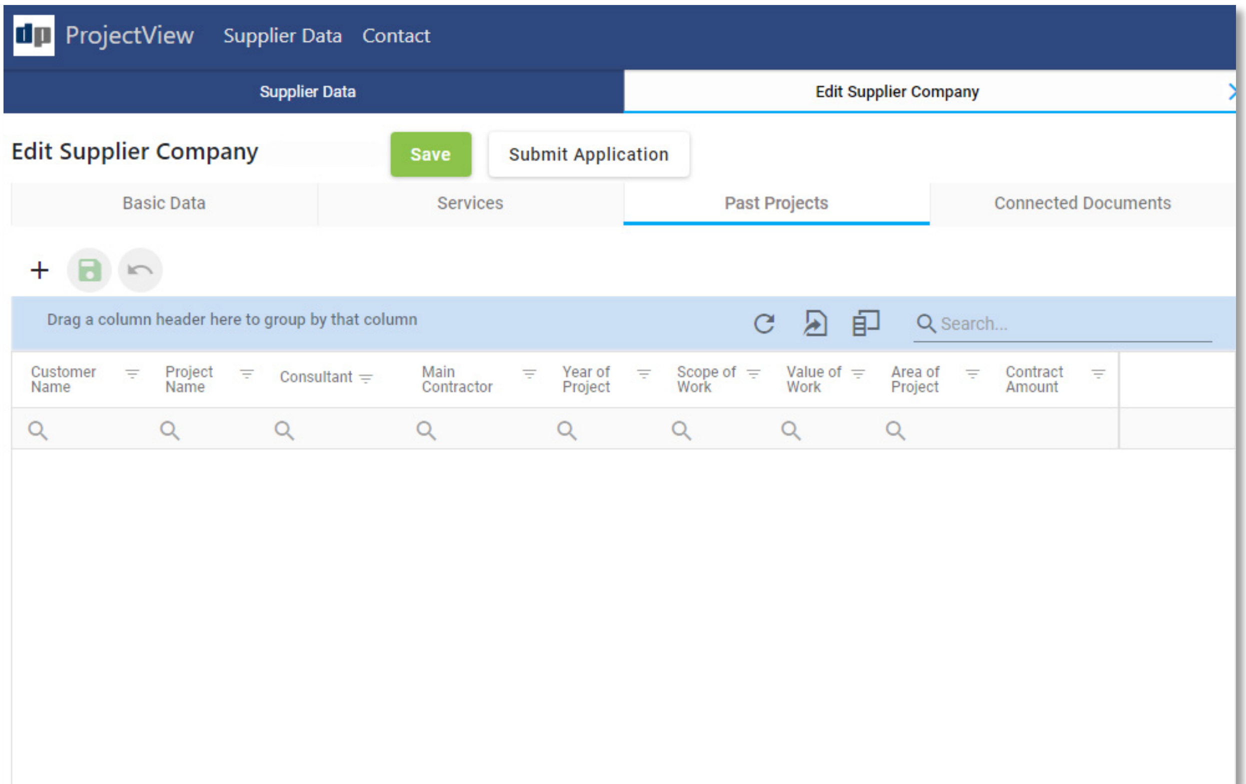

Figure 13 - Vendor past projects

Similarly to the Services/Categories tab, the vendor can:

1. Edit a project
2. Delete a project
3. Add a new project
4. Save any changes
5. Undo any changes

Step 2d – Connected Documents

This tab allows upload of the documents required for the successful completion of the registration progress.

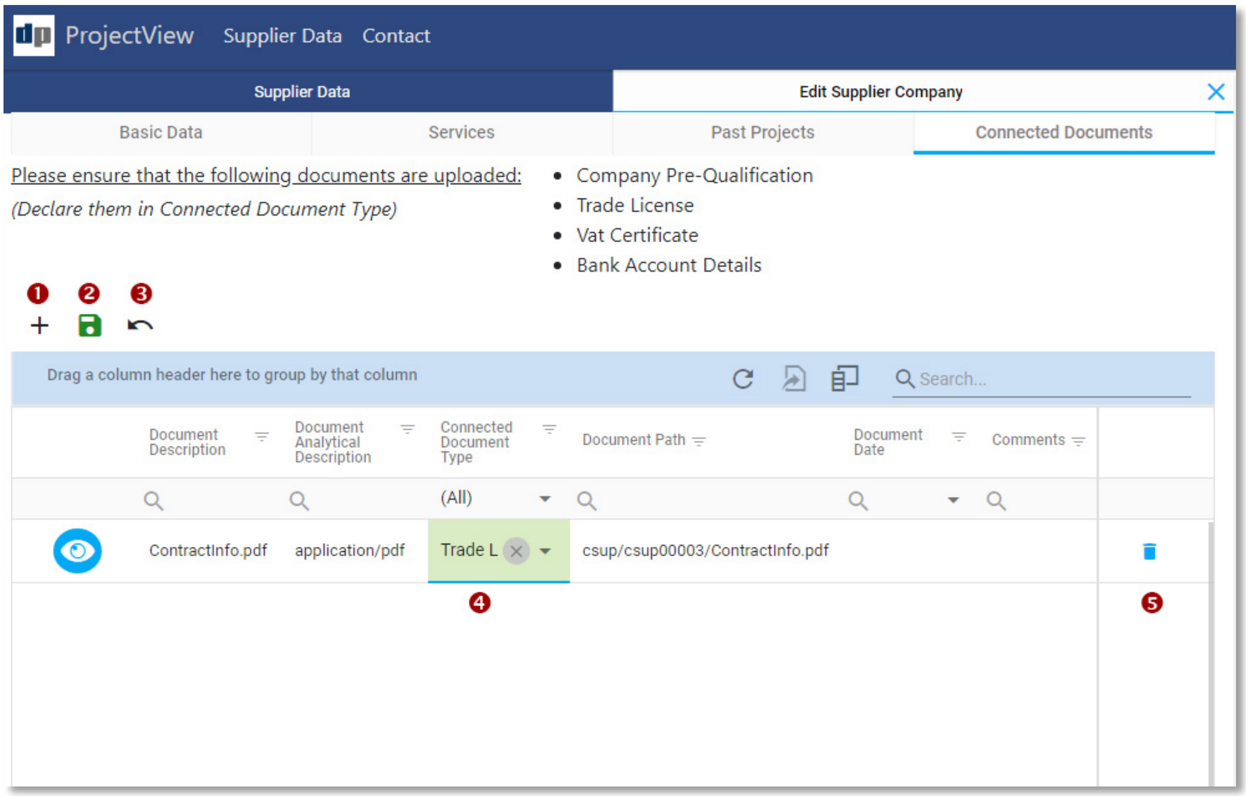

Figure 14 - Vendor documents

1. In order for a vendor to add a document, the vendor has to first add a new row in the list by clicking on the "+" button (1) on the top left corner of the list.
2. Having finished adding the document, the vendor has to click on the save button (2) to save **ANY** changes made to the list.
3. In case of an error, the undo button (3) can be clicked to revert changes.
4. **VERY IMPORTANT!** After uploading a document, the vendor must select a "Document Type"
5. The vendor can delete the uploaded document by clicking on the bin (5).

Note

- ✓ Any document added by a vendor have to be on a cloud location (e.g. Google Drive, Dropbox etc.). The vendor can copy and paste the document's location in the column "Document Path" inside the list.
- ✓ At least 1 document of each document type has to be submitted.

Step 3 – Data Submission

Having filled all necessary information in and uploaded all necessary documents, the vendor must submit his application.

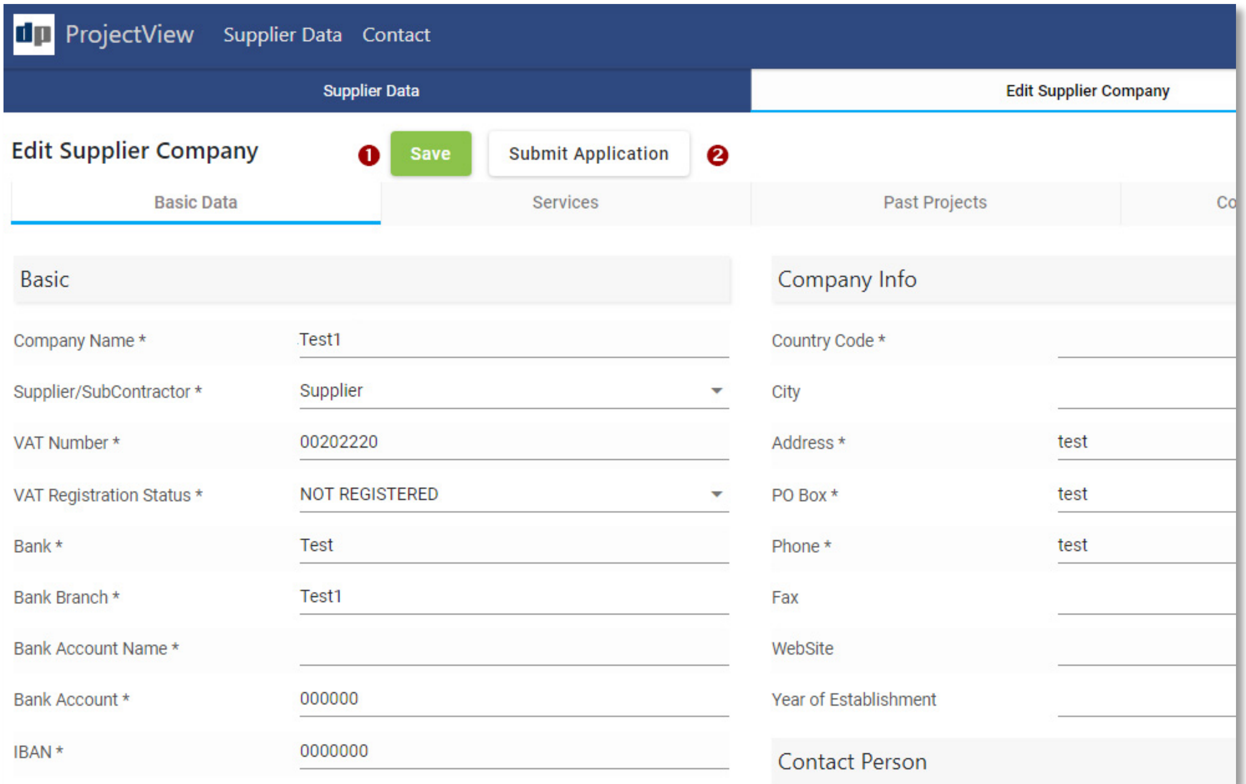

Figure 15 - Vendor Basic Data

1. To save any changes, the vendor can click on the “Save” button (1) at any time.
2. To submit the changes and begin the process of evaluation of the application by ASGC, the vendor can click on the “Submit Application” button (2).

In case of any queries or support issues, please contact us:

eprocurement.support@asgcgroup.com