

# PowerAdvocate Sourcing Intelligence<sup>®</sup>

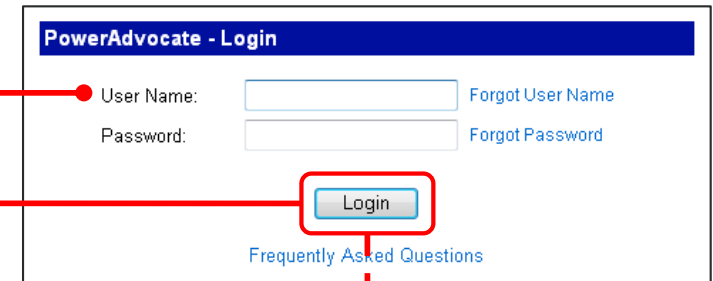
*Suppliers' Frequently Asked Questions*

August 2019



# How do I log in to Sourcing Intelligence?

1. Launch a web browser and go to [www.poweradvocate.com](http://www.poweradvocate.com), and then click the orange **Login** button.
2. Enter your account **User Name** and **Password** (both are case-sensitive).
3. Click **Login**.

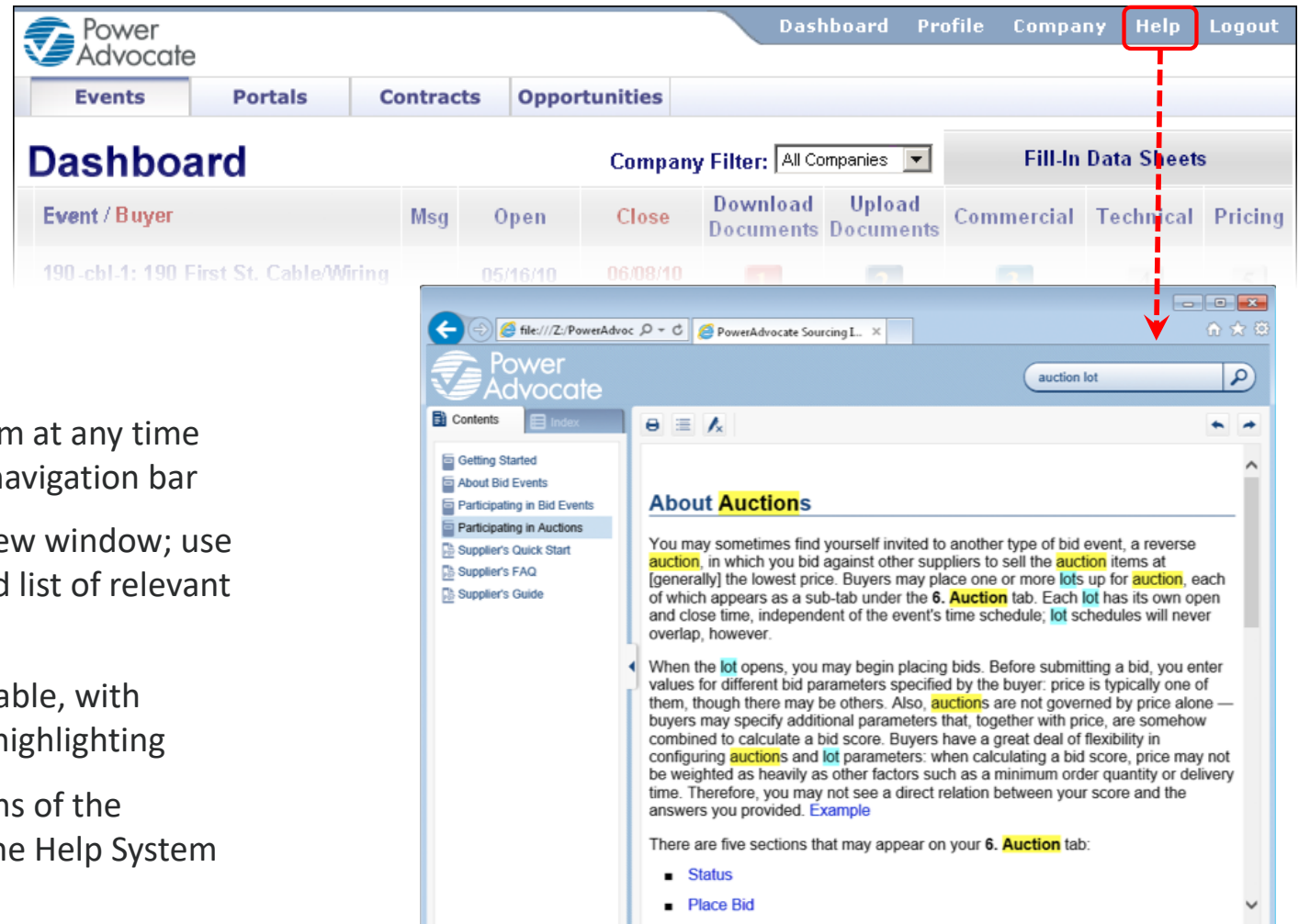


## Tips

- PowerAdvocate functions in most web browsers; however, using browsers other than Internet Explorer 11+, Edge, or Chrome may cause certain functionality to work unexpectedly.
- If you received an email from a Bid Event Coordinator inviting you to register, follow the instructions in the email to complete the registration process.
- **Portals** and **Contracts** tabs may appear if buyers also subscribe to Supplier Intelligence or Contract Intelligence, respectively. An **Opportunities** tab may also appear, which is described on page 5.

# How do I get more information if I need it?

You can contact PowerAdvocate Support at support@poweradvocate.com or by calling **857-453-5800**, Monday through Friday (excluding U.S. Federal Holidays) from 8:00 AM to 8:00 PM Eastern Time



The image shows two screenshots. The top screenshot is a screenshot of the Power Advocate dashboard. The 'Help' button in the top navigation bar is highlighted with a red box. A red dashed arrow points from this button down to a second screenshot. The second screenshot shows a browser window displaying the 'About Auctions' help page. The page title is 'About Auctions' and the content discusses the auction process, including terms like 'lot', 'bid', and 'score'. The page is fully navigable and includes a search bar and a table of contents.

## Online Help

- You can access the Help System at any time by clicking **Help** on the main navigation bar
- The Help System opens in a new window; use full-text search to get a ranked list of relevant help topics
- The Help System is fully navigable, with features such as search term highlighting
- You can download PDF versions of the documentation from within the Help System

# What information is displayed on my Dashboard?

Your Dashboard displays all bid events to which you have been invited.

Dashboard		Company Filter: All Companies		Fill-In Data Sheets				
Event / Buyer	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
190-cbl-1: 190 First St. Cable/Wiring Electric Power Utility		05/16/10 8:00 AM EDT	06/08/10 4:00 PM EDT	1	2	3	4	5
T42g: Colorado River Sluice Gates Great Western Utilities	1/1	04/04/10 10:00 AM EDT	06/30/10 4:00 PM EDT	1	2	3	4	5
1998-01: Grid Expansion Electric Power Utility		09/01/10 8:00 AM EDT	12/29/10 4:00 PM EST	1	2	3	4	5

Open and Pending Pre-Bid events

Pending (not Pre-Bid) and Closed events

Buying entity

Event name/number

Number of unread/total messages; click to access the **Messaging** tab.

The numbers on the Dashboard represent a general workflow, though you can work in any order:

- 1** Download the bid package.
- 2** Upload bid documents, proposals, etc.
- 3 4 5** Fill in online datasheets if present.




## Tips

- If an event is missing a type of datasheet, that number & its corresponding tab are grayed out (e.g., **3**).
- Events with links in the **Msg** column use PowerAdvocate Messaging; others use standard email.
- Supplier contacts are invited individually by the buyer

# How do I find other supplier opportunities?

Buyer companies have the option to make their bid events visible to all PowerAdvocate-registered suppliers.

When these opportunities exist, your **Opportunities** tab displays some high-level event information for you to evaluate.

Events		Opportunities				
<b>Opportunities Dashboard</b>						
Event Title	Company	Products / Services	Open Date	Close Date	Accessible	
Actuators	Acme Electric	Controls	08/18/2015 8:00 AM EDT	08/31/2015 4:30 PM EDT		
Next-Gen Boiler Upgrade	Universal Energy	Boiler Components	08/15/2015 8:00 AM EST	12/31/2015 4:00 PM EST		
<b>Description:</b> Looking for a cutting-edge implementation for a green building in the planning stages.						
Project Simulator	Solar Arrays LLC	Construction Services	08/01/2015 8:00 AM EDT	09/07/2015 4:00 PM EDT	Pending	
Site 101 Rough-out	Sheridan Builders	Piping	07/01/2015 9:00 AM EDT	12/31/2015 6:00 PM EST		

To request access to a posted event:

1. Click 

A pop-up appears asking you to verify your qualifications. You may also enter Optional Comments to the buyer, if you have something to add.

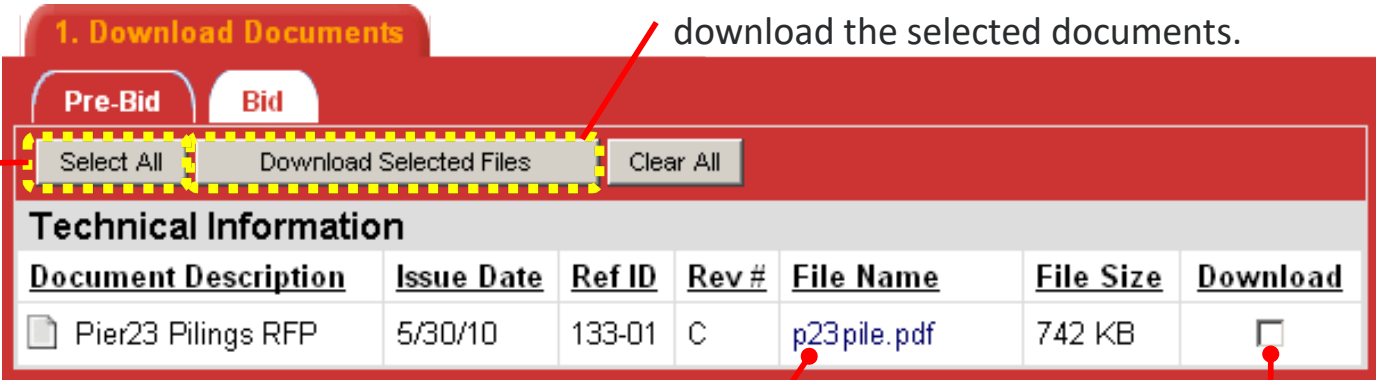
2. Click **Submit Request**.

The Accessible column will display Pending until the buyer approves your request. Once approved, the event will appear on your Events tab. If the buyer does not approve your request, the event will be removed from your Opportunities tab.

# How do I access the buyer's bid package?

Once a buyer invites you to participate in a bid event, that event appears on your Dashboard. You can begin downloading the buyer's bid documents after the event opens. From the Dashboard, click **1** to access the **1. Download Documents > Bid** tab, where you can download the buyer's entire bid package, download selected documents, or view individual documents online.

If the buyer invites you to Pre-Bid, you can access documents from the **1. Download Documents > Pre-Bid** tab before the event opens; the buyer must approve your Pre-Bid submittal before you can access the **Bid** sub-tab. Likewise, a **1. Download Documents > Post Bid** sub-tab indicates an invitation to post-bid negotiations.




Click **1. Download Documents** to access the bid package.

Click **Select All** to select all files in the bid package.

Click **Download Selected Files** to download the selected documents.

Click a document **File Name** to open and view it online

If there are multiple documents, you can selectively download them

Document Description	Issue Date	Ref ID	Rev #	File Name	File Size	Download
 Pier23 Pilings RFP	5/30/10	133-01	C	<a href="#">p23pile.pdf</a>	742 KB	<input type="checkbox"/>

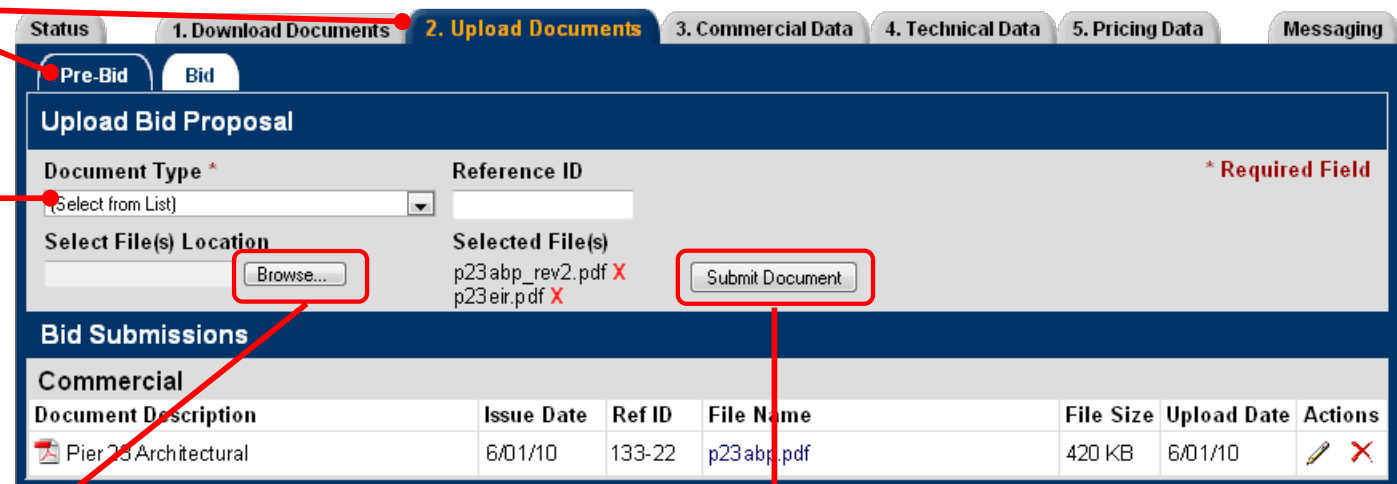
## Tip

➤ Selected documents are saved in a .zip file named **BidPackage-nnnn-n.zip** (nnnn-n is a unique ID).

# How do I submit documents to the buyer?

1. Go to the **2. Upload Documents** tab and select the appropriate sub-tab.

2. Select a **Document Type**.



**Upload Bid Proposal**

Document Type \* (Select from List) Reference ID \* Required Field




Select File(s) Location Selected File(s)

Browse... Submit Document

p23 abp\_rev2.pdf X  
p23 eir.pdf X

**Bid Submissions**



Commercial

Document Description	Issue Date	Ref ID	File Name	File Size	Upload Date	Actions
 Pier 23 Architectural	6/01/10	133-22	p23 abp.pdf	420 KB	6/01/10	 

3. Click **Browse**, navigate to your document, and click **Open**.

4. Click **Submit Document**.

## Tips

- **Reference ID** is optional, though it may be helpful for tracking documents.
- You can add, modify () , or delete () documents at any time before the event closes.
- There is no limit on the number or size of documents that you can upload; multiple files can also be compressed into a .zip archive for upload.
- Late documents, if the buyer opts to accept them, are flagged in red text.

# How do datasheets work?

Buyers often request that you complete datasheets as part of your bid package, in addition to your proposal and other event-related documents. Datasheets allow buyers to collect specific data that can be tabulated and compared across suppliers. If datasheets exist for an event, you access them from your Dashboard using the numbered buttons, or from the corresponding datasheet tab. If a buyer has not created a particular type of datasheet for the event, that button and its associated tab are disabled (grayed out).

There are three types of datasheets:

- Commercial: Collects information about your company and its policies, warranties, etc.
- Technical: Collects specific information about the products and services being procured.
- Pricing: Collects pricing data relevant to the event — item prices, service and shipping fees, etc.

**4. Technical Data**

Field Sampling | Tolerance Specifications | Project Method | Bulk Widgets

**Text fields can be used for headings or explanatory text**

Sections allow multiple fields to be grouped. Questions can be displayed above or to the left of the input field/selection.

**Section with free-form entry fields:**

Short Answer fields provide one line for text OR numerical input:

Long Answer fields provide a resizable field for alphanumeric input:

**Section with selector fields:**

Radio and Checkbox selections can be displayed horizontally or vertically

Select fields allow one answer:

Radio fields allow one answer:  Yes  No

Checkbox fields allow multiple answers:  Left  Right  Up  Down

Date fields provide a calendar control:

File Upload fields enable file attachments:  **SELECT**

	Column 1	Column 2
Row 1	Table cells allow either	alphanumeric
Row 2	or numeric input	01234567890

Save Submit


## Cautions

- Be sure to click **Save** before navigating elsewhere, or your data may be lost. Save your work often.
- Answer text fields are limited to 4,000 characters
- Multiple users from the same company cannot simultaneously fill out a datasheet — when one user saves, the work of others will be lost



# How do I communicate with the buyer? (1 of 2)

The buyer uses one of the following messaging options in Sourcing Intelligence:


- **Standard email** – Click an  icon to create a message to the buyer contact in your default email application.

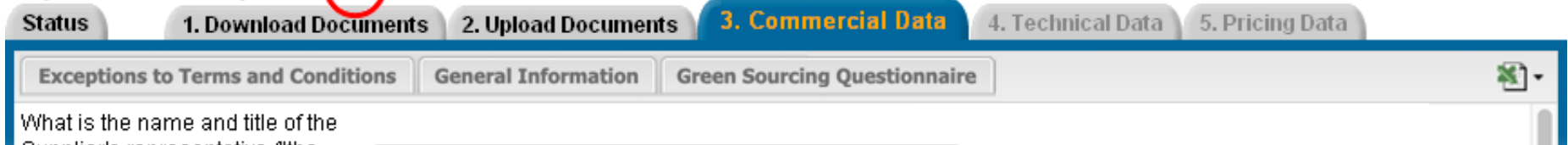
## 17579 : Widgets and Gizmos

## Electric Power Utility

Open: 08/19/09 08:00:00 AM EDT Close: 09/15/09 04:00:00 PM EDT

Time Remaining: 21 days 2 hours 56 mins 5 secs

Buyer Contact: Cathy Walsh 



The screenshot shows a software interface for a sourcing event. At the top, there are tabs for 'Status', '1. Download Documents', '2. Upload Documents', '3. Commercial Data' (which is highlighted in blue), '4. Technical Data', and '5. Pricing Data'. Below these tabs is a sub-menu with 'Exceptions to Terms and Conditions', 'General Information', and 'Green Sourcing Questionnaire'. A text input field is visible with the prompt 'What is the name and title of the'.

- **PowerAdvocate Messaging** – See the following slide.

## To create a message in PA Messaging:

1. Click the event's **Messaging** tab or the link in the **Msg** column on your Dashboard.
2. Click **Create New Message**.

**Create Message**

To: Cindy Walsh; Electric Power Utility (Bid Event Coordinator)  
Cc: Electric Power Utility Buyer Team Members  
Elsbeth International Bid Team Members  
From: Elsbeth Piernot; Elsbeth International  
Date: 10/2/07 2:13 PM EDT  
Subject: site visit rescheduled

Message:  
Could we reschedule the Substation #3 visit to 3:30pm?

Note: Maximum message length is 3000 characters.  
Attachments: Add Attachment

Description	Type	Submittals	View	Remove
Sub#3 site prep	Addenda			

Send Save Draft Close

Status 1. Download RFP 2. Upload Proposal 3. Commercial Data 4. Technical Data 5. Pricing Data **Messaging**

Create New Message Search Inbox: Search Send email notifications?  Yes  No

**Inbox (3)** New/Unread (1)

Status	Date	From	Company	Subject
	9/29/07 2:58 PM EDT	Peter Holm	Elsbeth International	engineering specialist
	9/29/07 2:53 PM EDT	Cindy Walsh	Electric Power Utility	site visit rescheduled
	9/29/07 2:52 PM EDT (3)	Cindy Walsh	Electric Power Utility	structural specialist

Sent (1) Drafts (1)

## To view a message:

- Click the message subject or status icon (/

**View Message**

Subject: site visit rescheduled

- 10/3/07 9:44 AM EDT; Michael Williams; Electric Power Utility to All Bid Teams
- 10/3/07 9:46 AM EDT; Cindy Walsh; Electric Power Utility to All Bid Teams

From: Cindy Walsh; Electric Power Utility  
To: Elsbeth International Bid Team  
Cc: Electric Power Utility Buyer Team  
Date: 10/3/07 9:46 AM EDT  
Subject: site visit rescheduled

Message:  
Are there any questions we need to address at the site visit? -- Cindy

Attachments:

Description	Type	RFx	View
site prep questions	Message Attachment		

Reply Close

## Tips

- New messages are sent to the Bid Event Coordinator and copied to the Buyer and Supplier Teams.
- Messages/file attachments are embedded within an event, and cannot be viewed outside of that event.
- Messages are sent to entire teams; one-to-one messaging is not allowed.
- You can choose to receive [external] email notifications of new event-related messages.