PowerAdvocate Sourcing Intelligence®

Suppliers' Frequently Asked Questions

August 2019

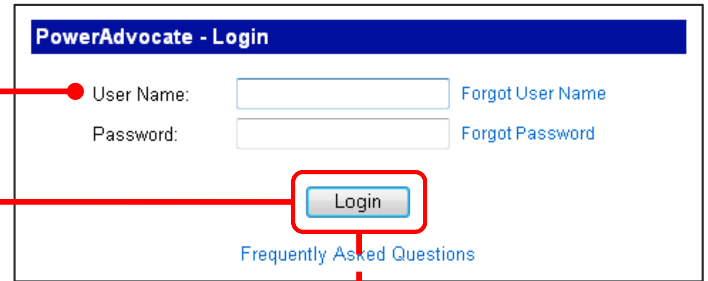
Power Advocate

How do I log in to Sourcing Intelligence?

1. Launch a web browser and go to www.poweradvocate.com, and then click the orange **Login** button.

2. Enter your account **User Name** and **Password** (both are case-sensitive).

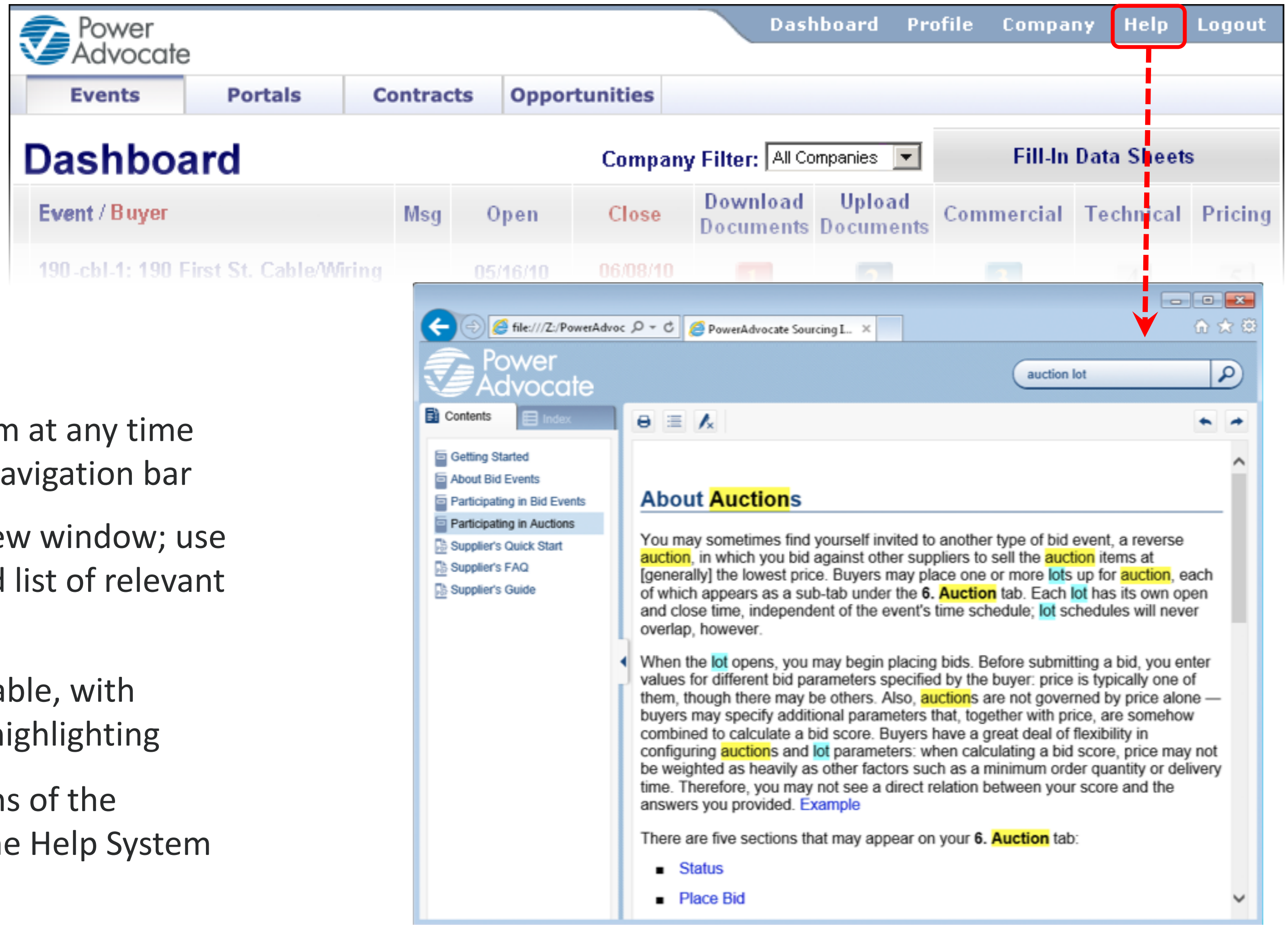
3. Click **Login**.



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.

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



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.

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.

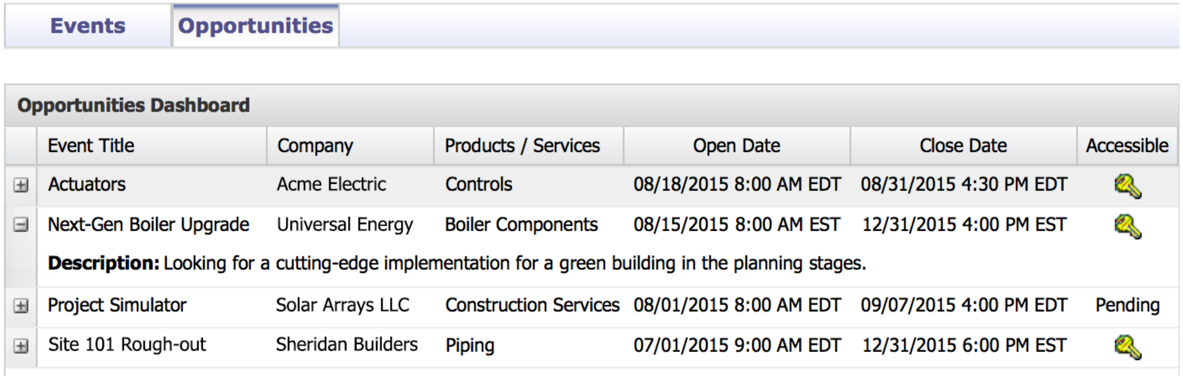
Tips

- 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 an **Opportunities** tab displays some high-level event information for you to evaluate.



Opportunities Dashboard

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	
Description: 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.

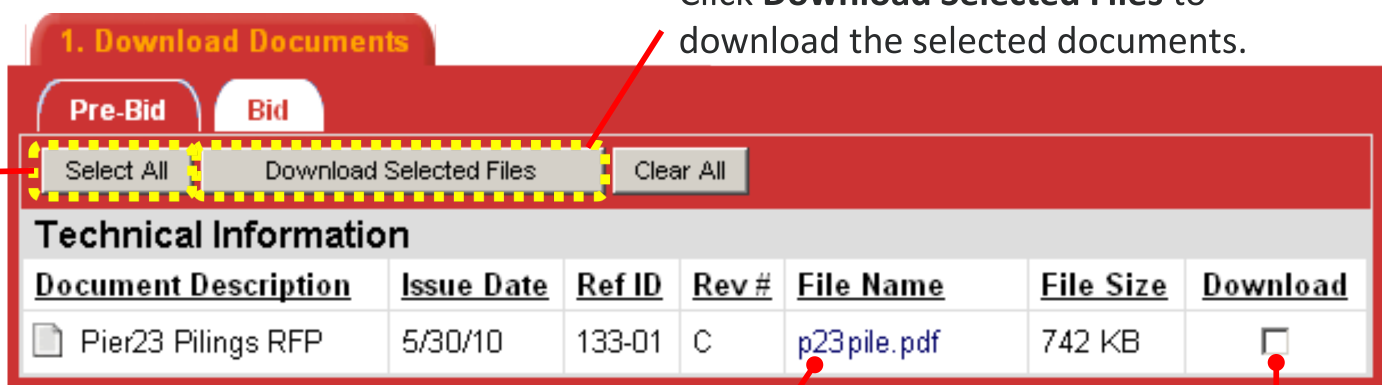
How do I access the buyer’s bid package?

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

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



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

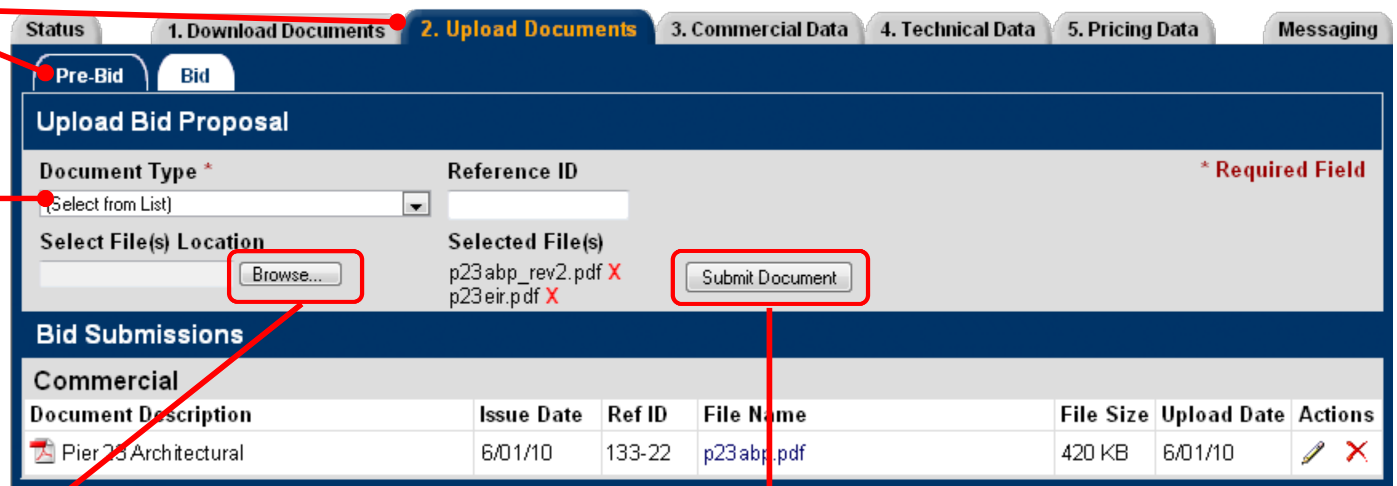
If there are multiple documents, you can selectively download them

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**.



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

Tips

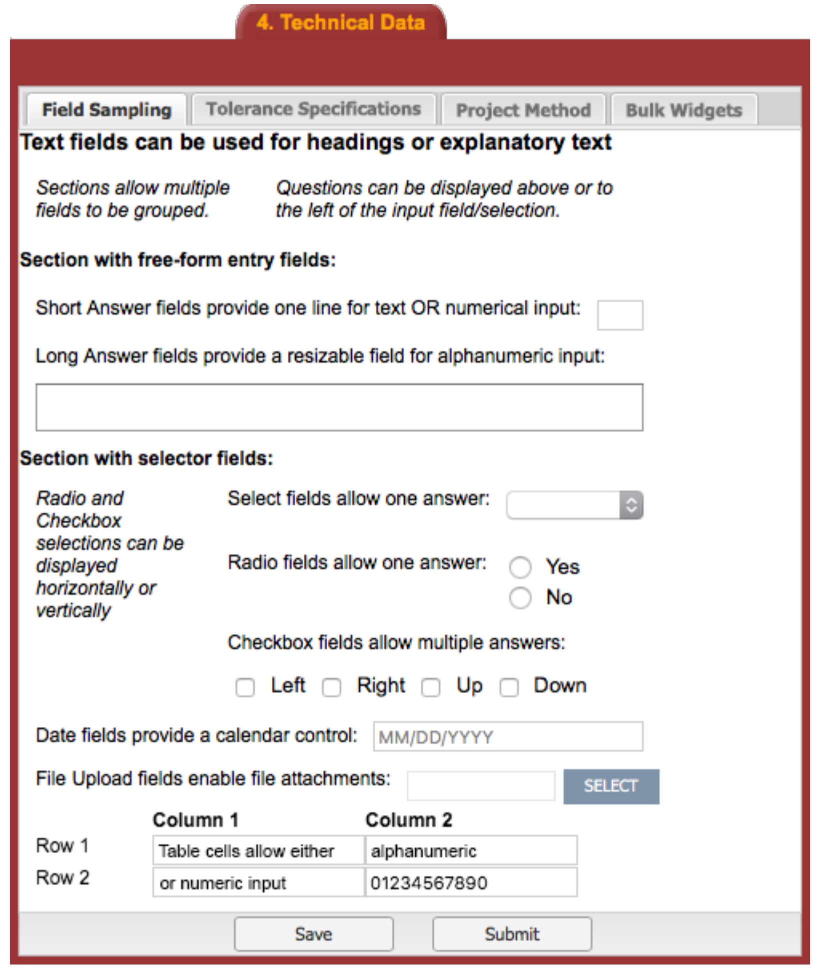
- **Reference ID** is optional, though it may be helpful for tracking documents.
- You can add, modify (), or delete () documents at any time before the event closes.
- There is no limit on the number or size of documents that you can upload; multiple files can also be compressed into a .zip archive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



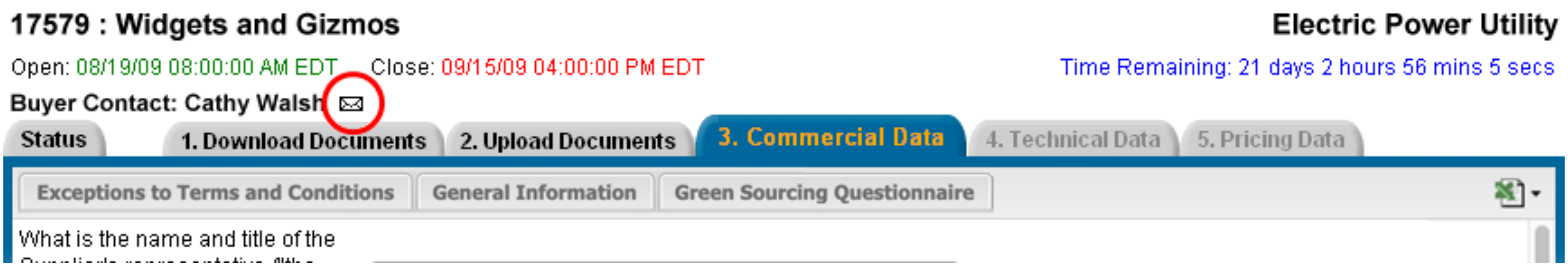
Cautions

- ➢ 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.



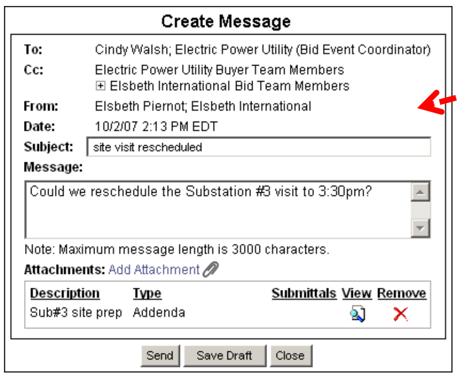
- **PowerAdvocate Messaging** – See the following slide.

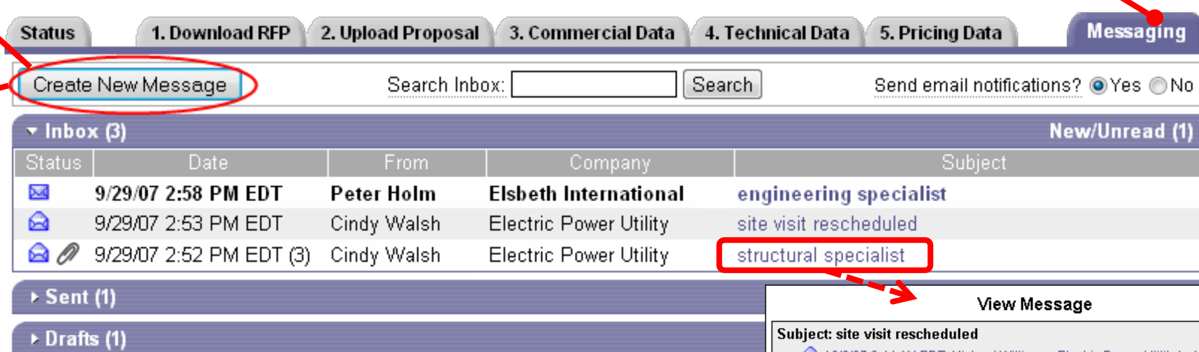
How do I communicate with the buyer? (2 of 2)

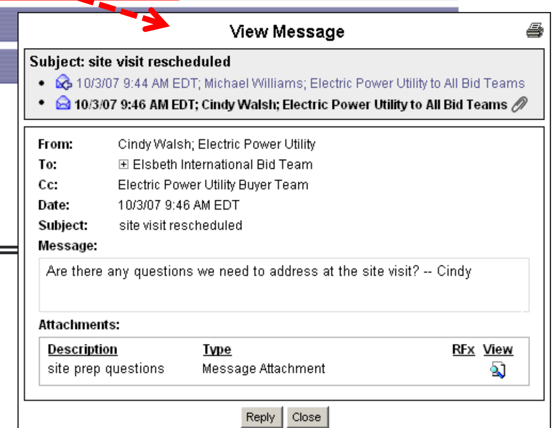
To create a message in PA Messaging:

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

2. Click **Create New Message**.







To view a message:

- Click the message subject or status icon (/)

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.