



Vendor Web Interface for Registration & submitting Quotations

This section describes how a vendor can register as a vendor via ProjectVIEW. The entire process is completed through ProjectVIEW's web portal.

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User Interface

Throughout the web portal you will find screens like the one below comprising of a blue utility bar and a list of entries. Please find below how to use these effectively.

The screenshot shows the 'Requests for Quotation' interface. At the top, there is a blue utility bar with the ProjectVIEW logo, the current page title 'Requests for Quotation', the user's email 'Hello testgr1@danaos-projects.com!', and a 'Log out' link. Below the utility bar, there is a sub-header 'Requests for Quotation' with a close button (X) and a notification icon (1). The main content area is titled 'Quotations' and features a pencil icon with a red circle containing the number 2, indicating an edit function. Below this is a utility bar with a search function and a notification icon (3). The main table has the following columns: Ready For Bid (4), Bid Position, Quotation No, Requisition No, TDate, Due Date, Net Amount, and Total. The table contains three rows of data, with the first row selected. The first row has a bid position of 0, quotation number QUT/18/207, requisition number REQ/18/476, TDate of 18/12/2018, Due Date of 31/12/2018 00:00, and a Net Amount of 2. The second row has a bid position of 0, quotation number QUT/18/220, requisition number REQ/18/485, TDate of 19/12/2018, Due Date of 24/12/2018 00:00, and a Net Amount of 0. The third row has a bid position of 0, quotation number QUT/18/224, requisition number REQ/18/491, TDate of 19/12/2018, Due Date of 31/12/2018 00:00, and a Net Amount of 2. At the bottom left, there is a 'Count: 3' label. At the bottom right, there is a notification icon (7) and a save icon.





Ready For Bid	Bid Position	Quotation No	Requisition No	TDate	Due Date	Net Amount	Total
(All)	0	QUT/18/207	REQ/18/476	18/12/2018	31/12/2018 00:00	2	
	0	QUT/18/220	REQ/18/485	19/12/2018	24/12/2018 00:00	0	
	0	QUT/18/224	REQ/18/491	19/12/2018	31/12/2018 00:00	2	

Figure 1 –User Interface

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** an entry, the selected entry is displayed on screen.
3. Utility Bar. Contains a number of helpful options for managing the list of entries.
4. List Column Headers
5. List Column Filters
6. List of entries. Select row and press the Edit Button to display the selected quotation.
7. Save Column Configuration. Saves the list and state of visible columns.

1.1 Utility Bar

The utility bar contains the following buttons:

-  Refreshes the list of entries
-  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 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 list.

1.2 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 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 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).

1.3 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 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 list.

2 New User Registration

2.1 Step 1 – Initial Registration

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

Vendor Registration

Create a new account.

Basic	Other
Company Name *	Currency Select...
Supplier/SubContractor * Select...	Comments
Services * Select...	Contact Person
VAT Number *	Contact Name
VAT Registration Status * Select...	Contact Phone
Bank *	Contact Mobile
Bank Branch *	Contact Email
Bank Account Name *	Login Credentials
Bank Account *	Email *
IBAN *	Password *
Swift Code	Confirm password *
Company Info	REGISTER 1
Country * Select...	

Figure 2 - 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.

2.2 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 and you will be notified on the status of your application.

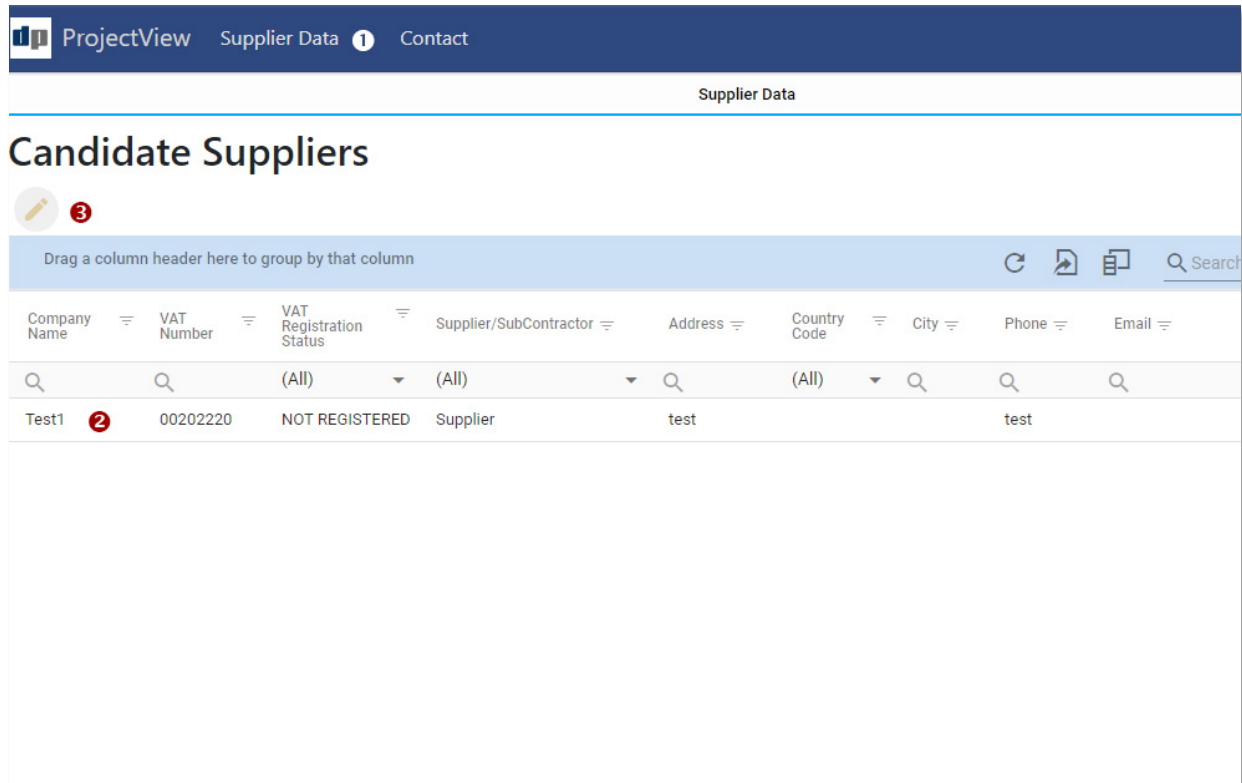


Figure 3 - Vendor Data

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

2.3 Step 2a – Basic Data

This tab displays all the information already entered during registration.

The screenshot shows the 'Edit Supplier Company' form in the ProjectVIEW ERP system. The form is divided into two main sections: 'Basic Data' and 'Company Info'. The 'Basic Data' section includes fields for Company Name (*), Supplier/SubContractor (*), VAT Number (*), VAT Registration Status (*), Bank (*), Bank Branch (*), Bank Account Name (*), Bank Account (*), and IBAN (*). The 'Company Info' section includes fields for Country Code (*), City, Address (*), PO Box (*), Phone (*), Fax, WebSite, and Year of Establishment. There are two buttons at the top: a green 'Save' button (1) and a 'Submit Application' button (2).

Basic Data		Company Info	
Company Name *	.Test1	Country Code *	
Supplier/SubContractor *	Supplier	City	
VAT Number *	00202220	Address *	test
VAT Registration Status *	NOT REGISTERED	PO Box *	test
Bank *	Test	Phone *	test
Bank Branch *	Test1	Fax	
Bank Account Name *		WebSite	
Bank Account *	000000	Year of Establishment	
IBAN *	00000000	Contact Person	

Figure 4 - 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, 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.

2.4 Step 2b – Services/Categories

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

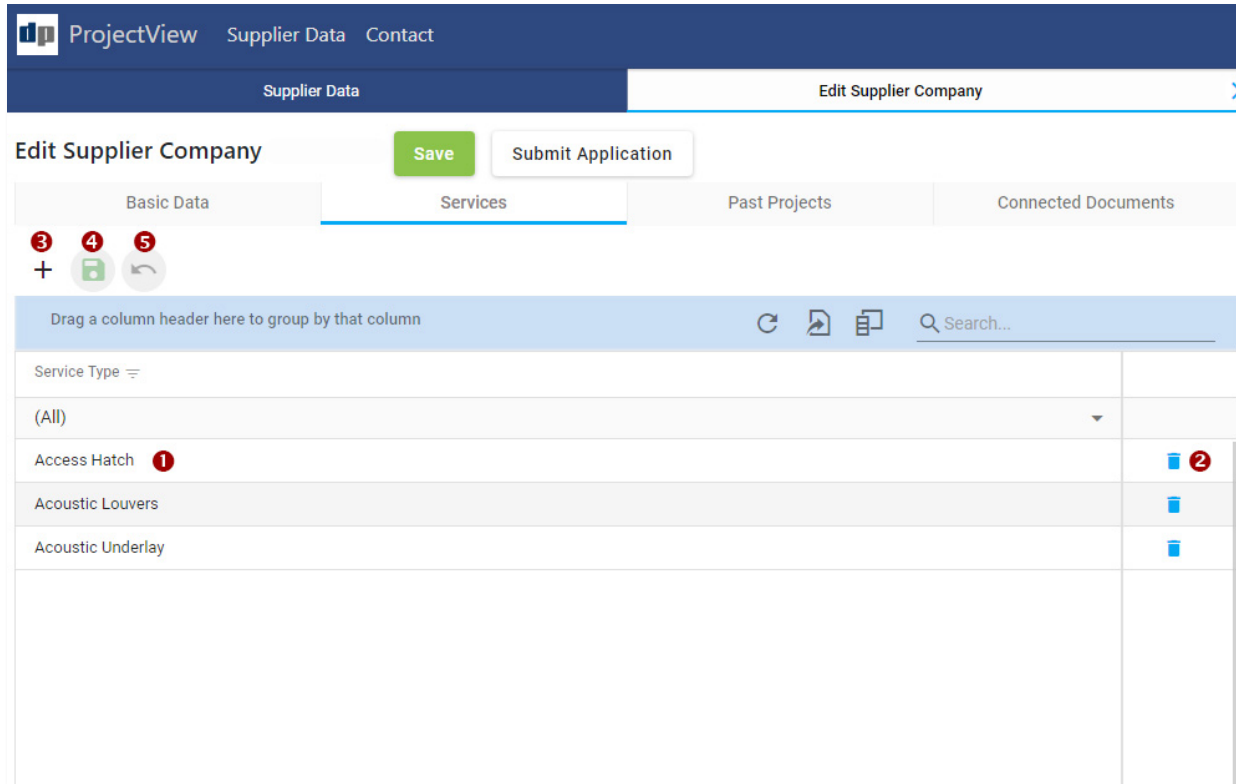


Figure 5 - Vendor Services/Categories

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

2.5 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. A minimum number of 4 projects is mandatory.

The screenshot shows the 'Edit Supplier Company' interface in ProjectVIEW ERP. The 'Past Projects' tab is selected, displaying a table with the following columns: Customer Name, Project Name, Consultant, Main Contractor, Year of Project, Scope of Work, Value of Work, Area of Project, and Contract Amount. Each column has a search icon. Above the table is a search bar and a group-by instruction: 'Drag a column header here to group by that column'. The interface also includes a 'Save' button and a 'Submit Application' button.

Figure 6 - 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

Note

All the fields are mandatory.

2.6 Step 2d – Connected Documents

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

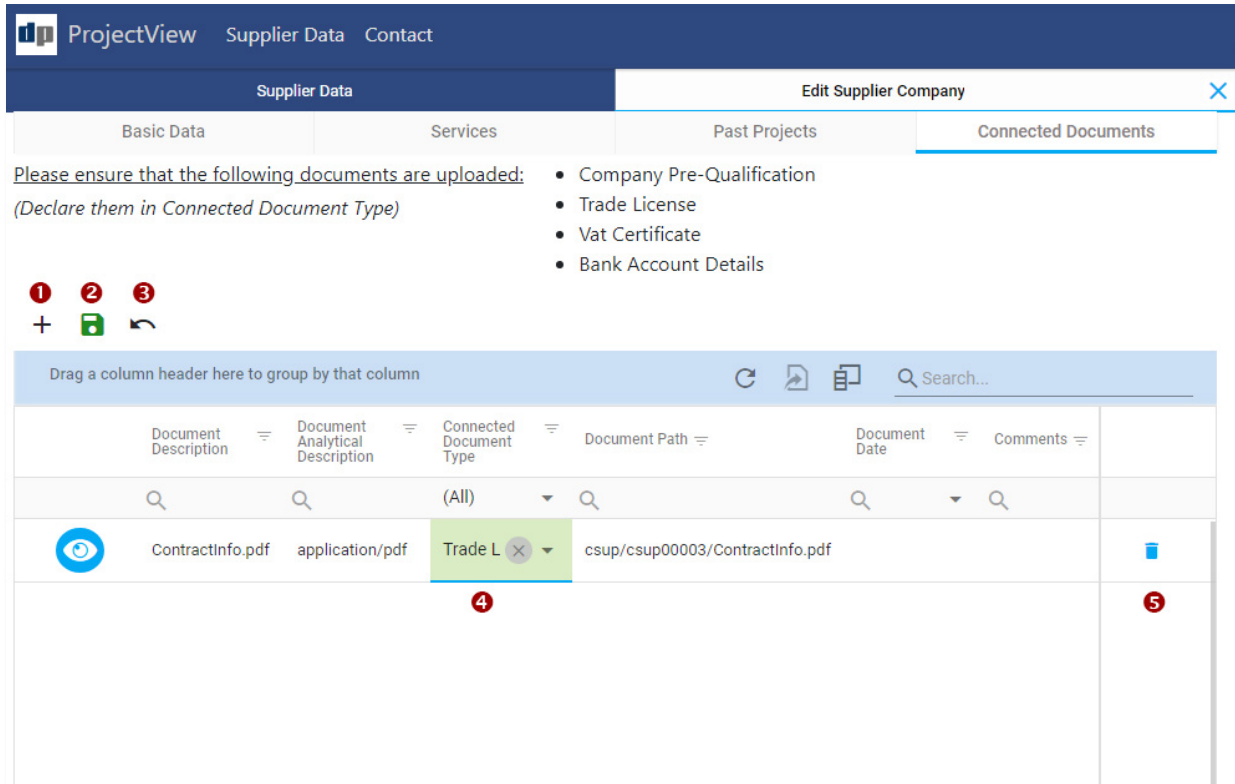


Figure 7 - Vendor documents

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.

2.7 Step 3 – Data Submission

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

The screenshot shows the 'Edit Supplier Company' form in the ProjectVIEW ERP system. The form is divided into several sections: 'Basic Data', 'Services', 'Past Projects', and 'Company Info'. The 'Basic Data' section contains the following fields:

Field	Value
Company Name *	.Test1
Supplier/SubContractor *	Supplier
VAT Number *	00202220
VAT Registration Status *	NOT REGISTERED
Bank *	Test
Bank Branch *	Test1
Bank Account Name *	
Bank Account *	000000
IBAN *	0000000

The 'Company Info' section contains the following fields:

Field	Value
Country Code *	
City	
Address *	test
PO Box *	test
Phone *	test
Fax	
WebSite	
Year of Establishment	

The form also includes a 'Contact Person' section. At the top of the form, there are two buttons: 'Save' (1) and 'Submit Application' (2).

Figure 8 - 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, the vendor can click on the “Submit Application” button (2).



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