

Apet®360Pro™ Procurement Portal User Guide 9



Creating Providers and Panels

Overview

This User Guide describes the steps involved to add Provider accounts and Panels into 360Pro™.

When Users want to set up a private Job (i.e. select/restricted) this means only certain Providers and Panel members are invited to bid on the Job. To create a private Job, Users need to add Providers and Panel members to the Job **before** publishing. Providers can have an existing account or they can be added by the User.

Providers

As a User of Apet® 360Pro™ you can create new Providers (Providers can also create their own account through the 360Pro™ Provider portal). The steps below show how a User can create a Provider account manually or via importation. Provider Names can include special characters and foreign languages.

We recommend **NOT** creating 'real' Provider accounts in your Sandpit/Testing account because those Providers will receive Job Publication emails if they're invited to any 'test' Select/Restricted/Private Jobs (along with any other email notifications triggered in 360Pro for that Job)

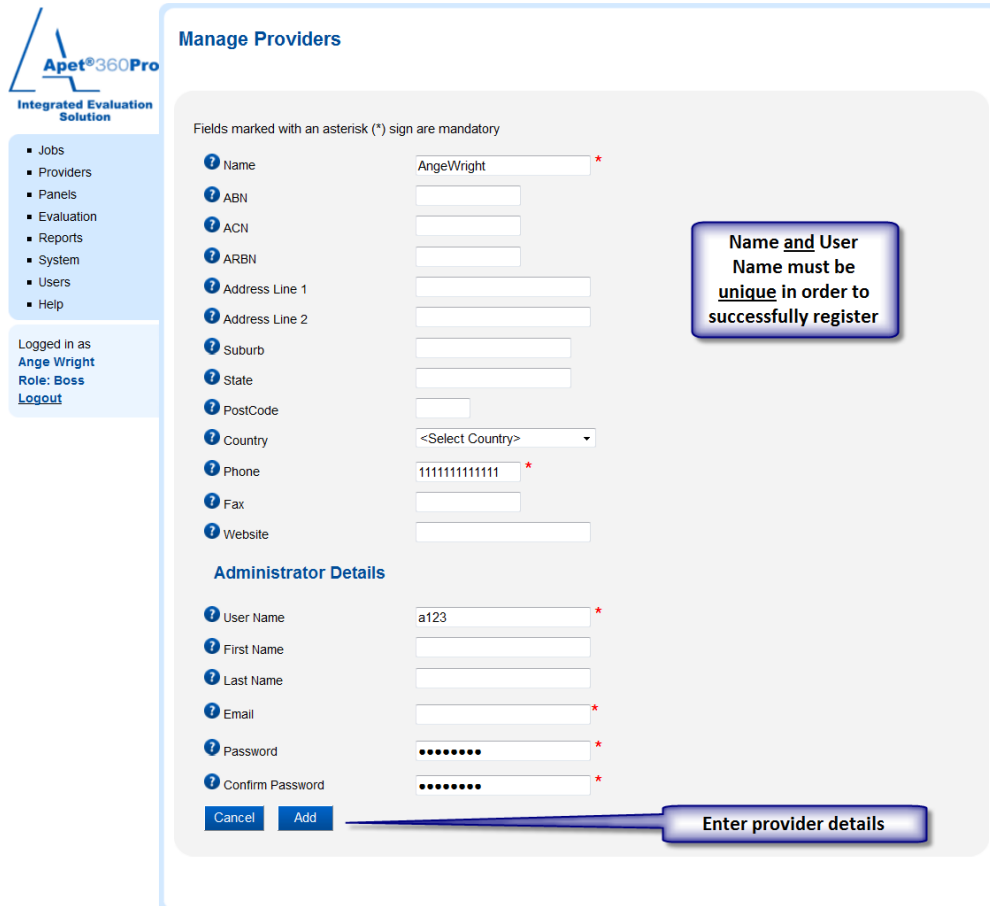
1. Create a Provider manually

Click on Providers from the main menu

If you are not sure whether an account already exists for a Provider in your account, do a quick search via the search function.

Click 'Add' to create a Provider account manually

Enter the Provider details.



Manage Providers

Fields marked with an asterisk (*) sign are mandatory

Name: AngeWright *

ABN: []

ACN: []

ARBN: []

Address Line 1: []

Address Line 2: []

Suburb: []

State: []

PostCode: []

Country: <Select Country>

Phone: 1111111111111111 *

Fax: []

Website: []

Administrator Details

User Name: a123 *

First Name: []

Last Name: []

Email: [] *

Password: [] *

Confirm Password: [] *

Cancel Add Enter provider details

Name and User Name must be unique in order to successfully register

Figure 1 Add Provider details

2. Create a Provider via import

Before importing Provider details, please check with simplylogical.net to ensure a Provider account(s) does not already exist. 360Pro will not allow duplicate Provider names or usernames.

- 1.1. Click on Providers from the main menu.
- 1.2. Click Import to add Provider accounts from an import Excel file.
- 1.3. Browse to the completed import template and click 'Import file'.
- 1.4. The list of Providers is now shown on the Manage Providers view.

3. Edit Provider details

After the Provider has been created (either manually or via import), details cannot be edited by the Boss User or Job Manager. Please contact support@simplylogical.net to request assistance with editing an existing Provider account; the 360Pro Super User will make the necessary changes.

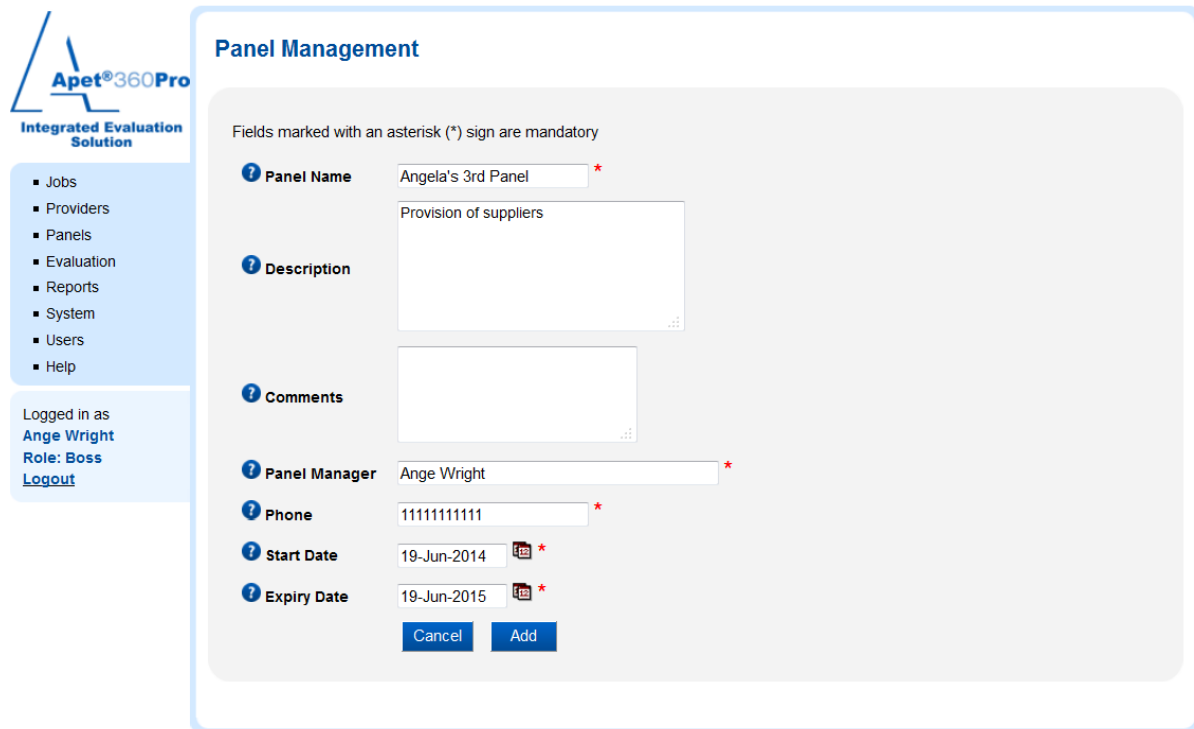
Panels

Panels usually comprise pre-approved Providers; (often standing offers).

To view existing Panels or set up a new Panel, click Panels from the main menu.

Click Add to create a new Panel.

Enter the Panel details and click Add.



Panel Management

Fields marked with an asterisk (*) sign are mandatory

Panel Name *

Description

Comments

Panel Manager *

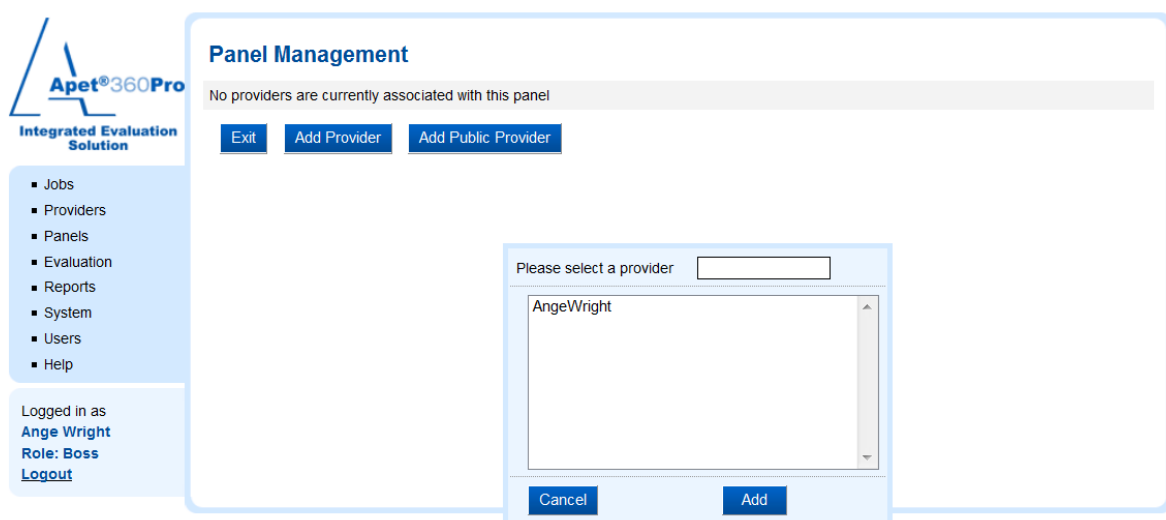
Phone *

Start Date *

Expiry Date *

Figure 2 Add Panel details

Return to the Panel Management page and click Add Provider to add Providers to the Panel



Panel Management

No providers are currently associated with this panel

Please select a provider

AngeWright

Figure 3 Select Providers to become members of that Panel

Issuing a Private/Select Job - Adding Providers or Panels to a Job

To make Jobs Private (Select/Restricted), you can add Providers/Panels to a specific Job via the Globe icon **BEFORE** the job is published.

Adding Providers to the job before it is published is what makes the job Private. If no providers are added to the job before it is published, it is a 'public' job.

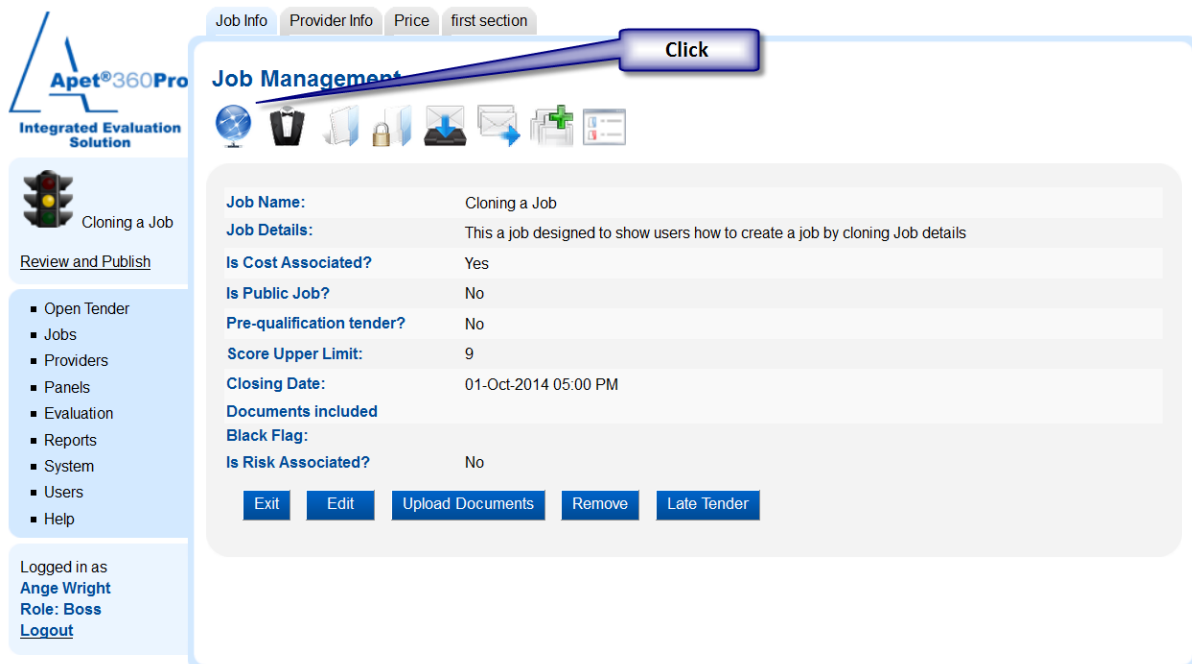


Figure 4 Adding Providers or Panels to a Job

To Add Provider(s) or Panel(s) to a job, click on the globe icon for that job. By selecting 'Add Provider' (Providers already listed in your 360Pro account), 'Add Public Provider' (select a Provider from all publically listed Provider accounts), or 'Add from Panel' (Select from a pre-existing Panel) you can choose who gets invited to bid on the job.

When the Job is published, the selected Providers will be advised of the Job by automatic email from 360Pro (refer to User Guide 14 for more information on the 'Job Published' email template).

If, after publishing the select/restricted job, you have forgotten to invite a specific Provider to the job, you can invite them by clicking on the 'Include Live Provider' button via the Globe icon. The Provider account must already be in your account to do this. After you add this Provider, they will receive the same Job Published email as the initial providers who were invited to the Job.

Removing Manager's rights to edit Panels & Providers

Boss Users have the option in System Settings (see User Guide 1 – Configuration of a 360Pro Account) to remove Manager's rights to edit Panels & Providers. The reasoning is to place control of

editing Provider and Panel details with the Bosses' area of responsibility; especially in situations where a client may have numerous Manager users.

If *Managers can Edit Panels and Providers* is ALLOWED (checkbox is ticked by default): Managers continue to have full edit access to Panels and Providers.

If *Managers can Edit Panels and Providers* is NOT ALLOWED (box is unchecked):

1. Managers will no longer see and access the Panels and Providers menu options on the left-hand side menu or on Apet 360Pro™ main menu.
2. Managers will not be able to Add or Edit Providers details.
3. Managers will not be able to Add Panels.
4. Managers will not be able to Add or Edit Providers (panel members) to a Panel.
5. Managers will still be able to assign Providers and Panels to a Job via the Globe icon within a Job (i.e. making a restricted Job).
6. Managers will still be able to evaluate and run reports on restricted Jobs.

Removing Manager's rights to pick and choose Provider's from a Panel when inviting them to a select tender

Boss Users have the option in their System Settings (see User Guide 1 – Configuration of a 360Pro Account) to remove Managers' ability to pick Providers from a Panel.

If Managers are ALLOWED to pick and choose Providers from a Panel (checkbox is ticked by default): Managers continue to have full edit access to Panels and Providers.

If *Managers can pick and choose Providers from a Panel* is NOT ALLOWED (box is unchecked):

1. Managers will still be able to assign Panels to a Job via the Globe icon within a Job (i.e. making a restricted Job).
2. Managers will still be able to Select Providers from a Panel (Figure 6).
3. Managers will not be able to uncheck the 'Select' box beside a Provider's name (Figure 7). Managers will have to add all panel members.
4. Managers will still be able to evaluate and run reports on restricted Jobs.

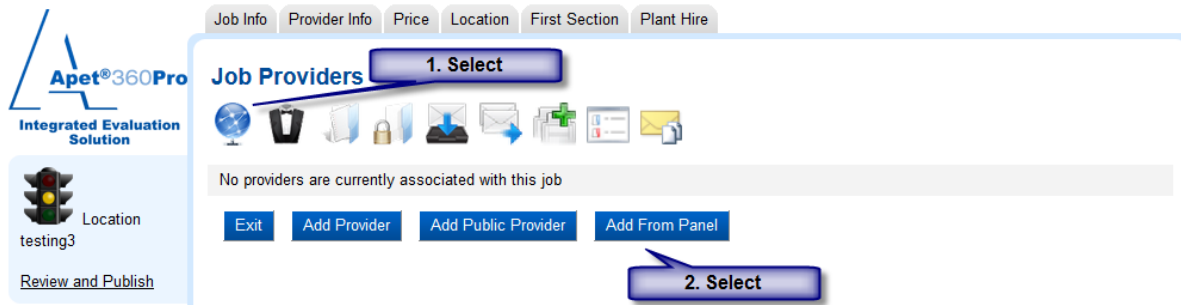


Figure 5 Adding a Panel of Providers to a Job

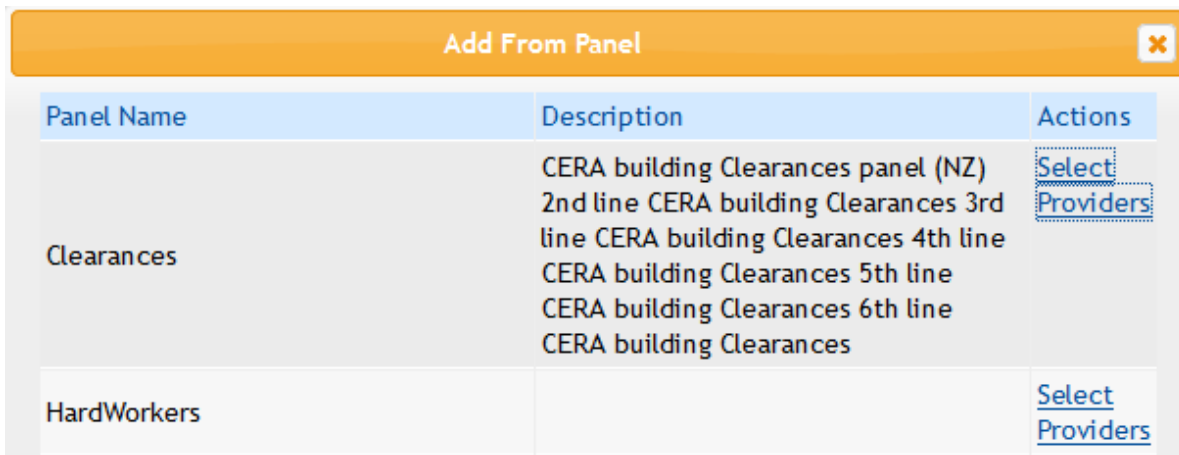


Figure 6 Panel description and option to Select Providers

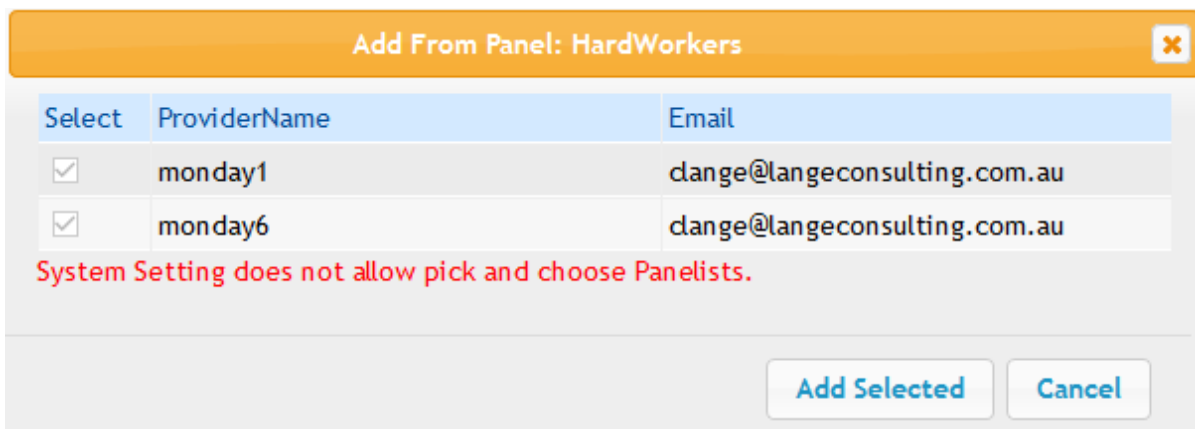


Figure 7 Providers listed on the Panel (Managers unable to de-select Providers)