Registering as an admin

You can register yourself as an Admin on our Supplier relationship management portal through our Email.

Step 1

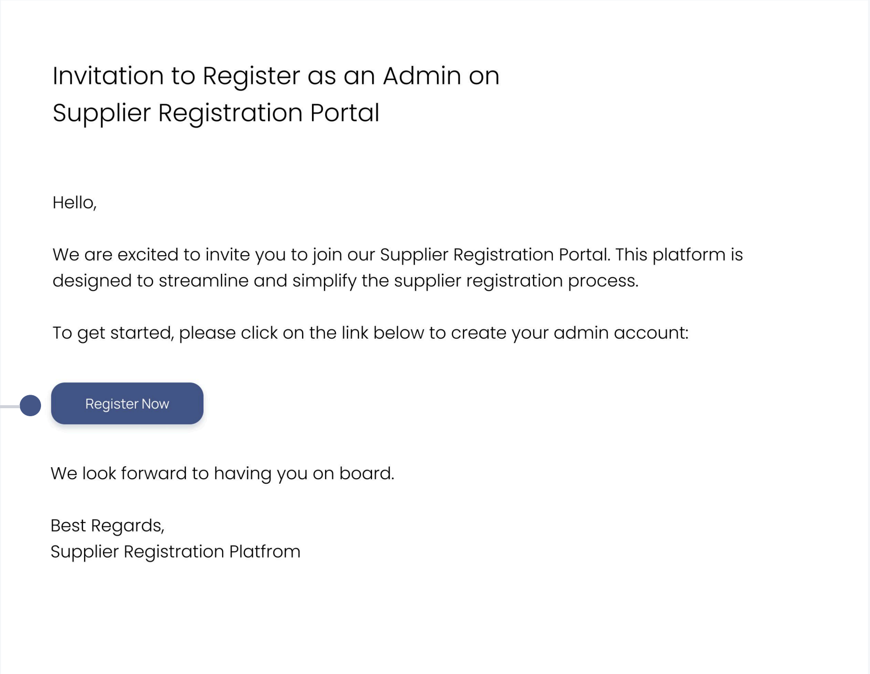
Open the Email that you have received from our Supplier registration portal.

Step 2

Click on the "Register Now" button to create your admin account.

Note :

Once you click on the Register now link, you'll see the confirmation message "Successfully verified your email, redirecting to the sign-up page".


Invitation to Register as an Admin on Supplier Registration Portal

Hello,

We are excited to invite you to join our Supplier Registration Portal. This platform is designed to streamline and simplify the supplier registration process.

To get started, please click on the link below to create your admin account:

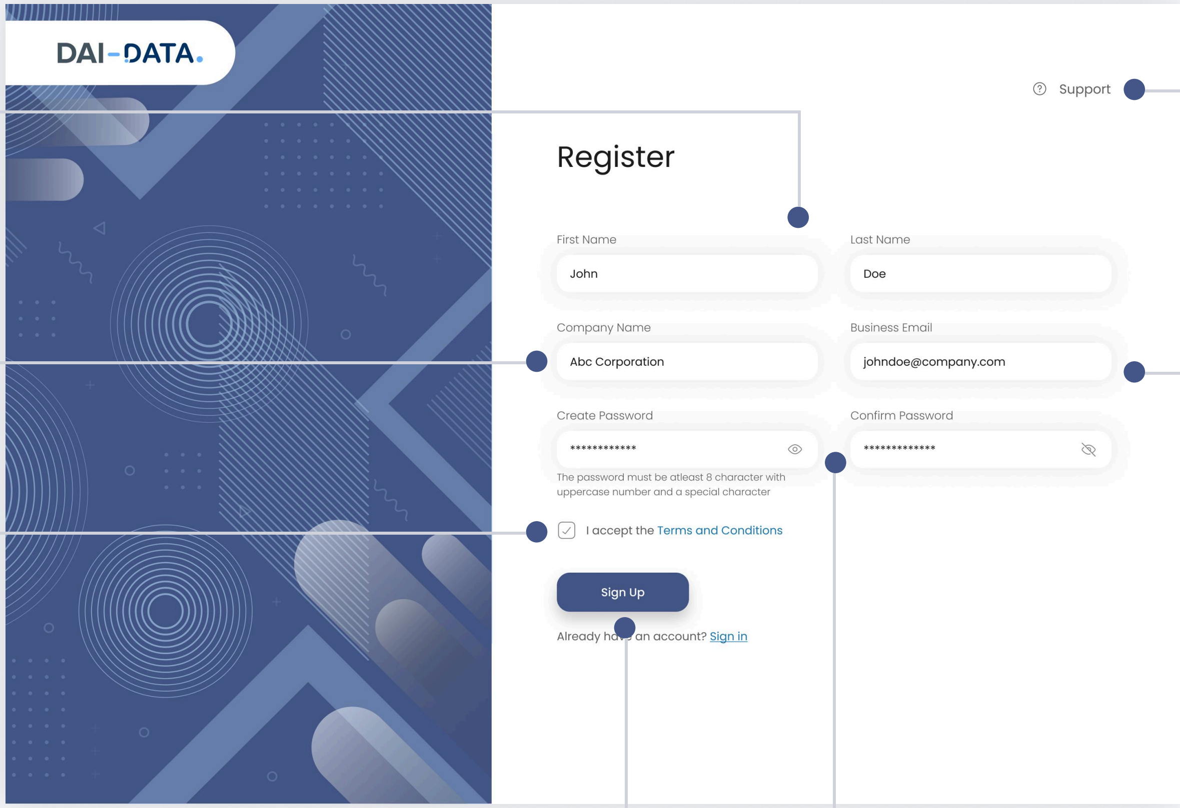
Register Now

We look forward to having you on board.

Best Regards,
Supplier Registration Platfrom

1 How to sign up?

Follow the steps



Step 1

Enter your first name and last name

Step 2

Enter your company's name

Step 4

Go through the Terms and Conditions and click in the checkbox.
It's a necessary step for legal compliance and to finalize the account creation.

Support

If you encounter any issues while Registration or sign in, click on the 'Support' option to get assistance reply from the Customer support team.

Note :

You can see that the business email field already has the email address that you have registered with.

Step 3

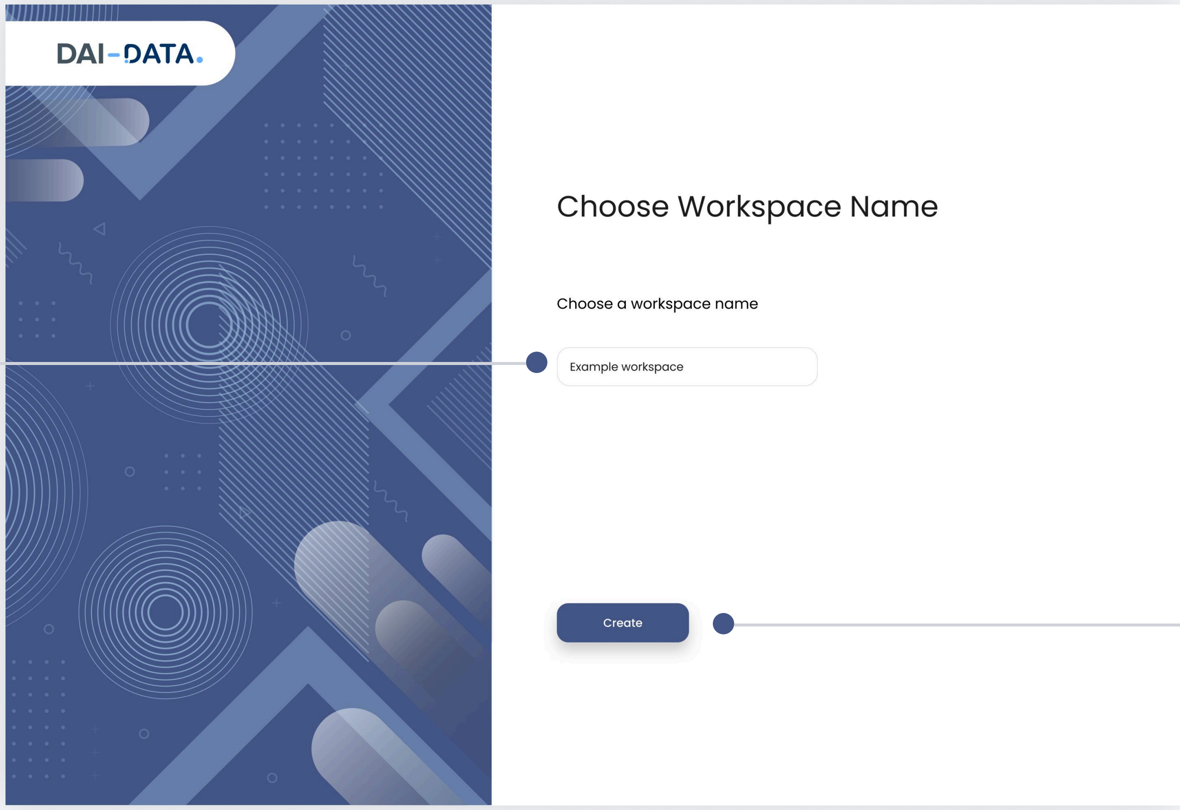
Type in a password that contain at least one special character, one uppercase letter, and one digit. Your password must be at least 8 characters long. Then confirm your password.

Step 5

Click on the 'Sign up' button

2 Workspace name selection

Follow the steps



Step 1

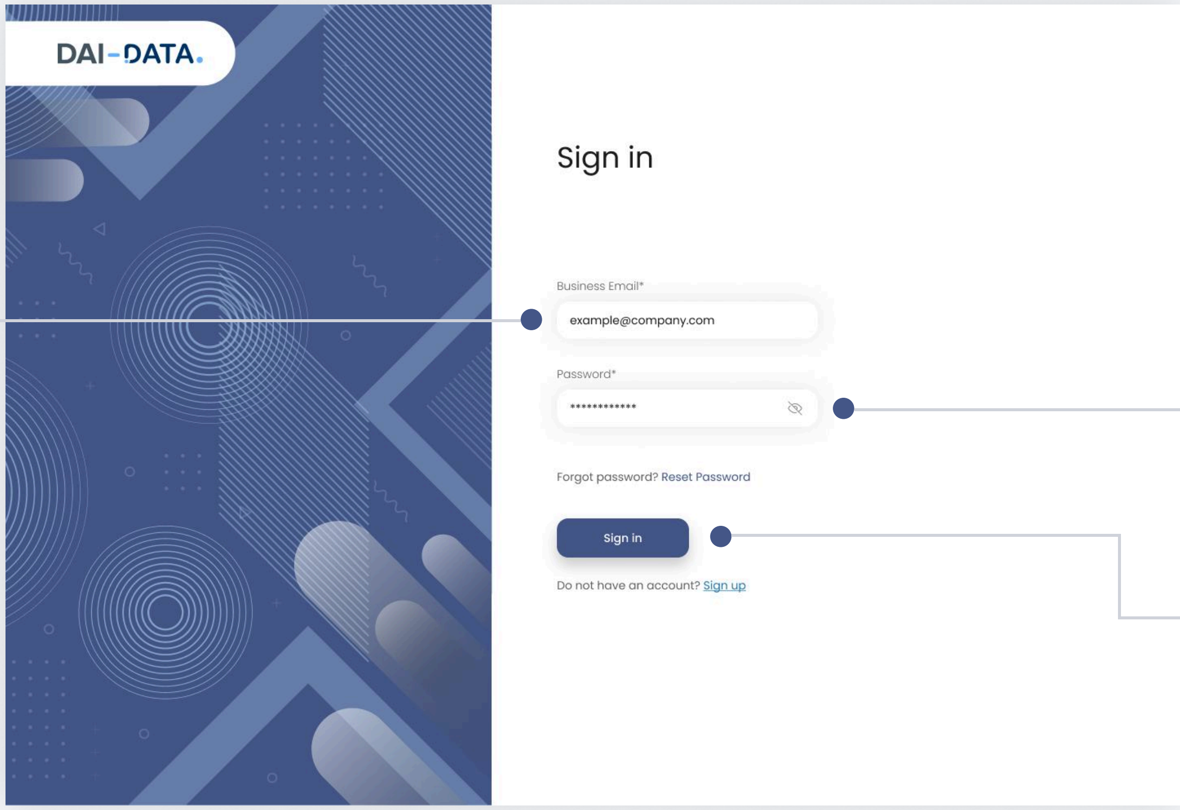
Choose a workspace name suitable for your company and enter it in the field provided.

Step 2

Click on the 'Create' button to create your workspace.

3 How to sign in?

Follow the steps



Step 1

Enter your business email address that you used to register.

Step 2

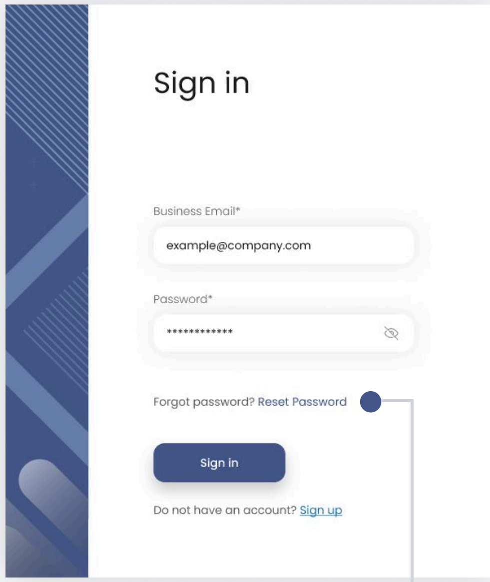
Enter your Password.

Step 3

Click on the 'Sign in' button.

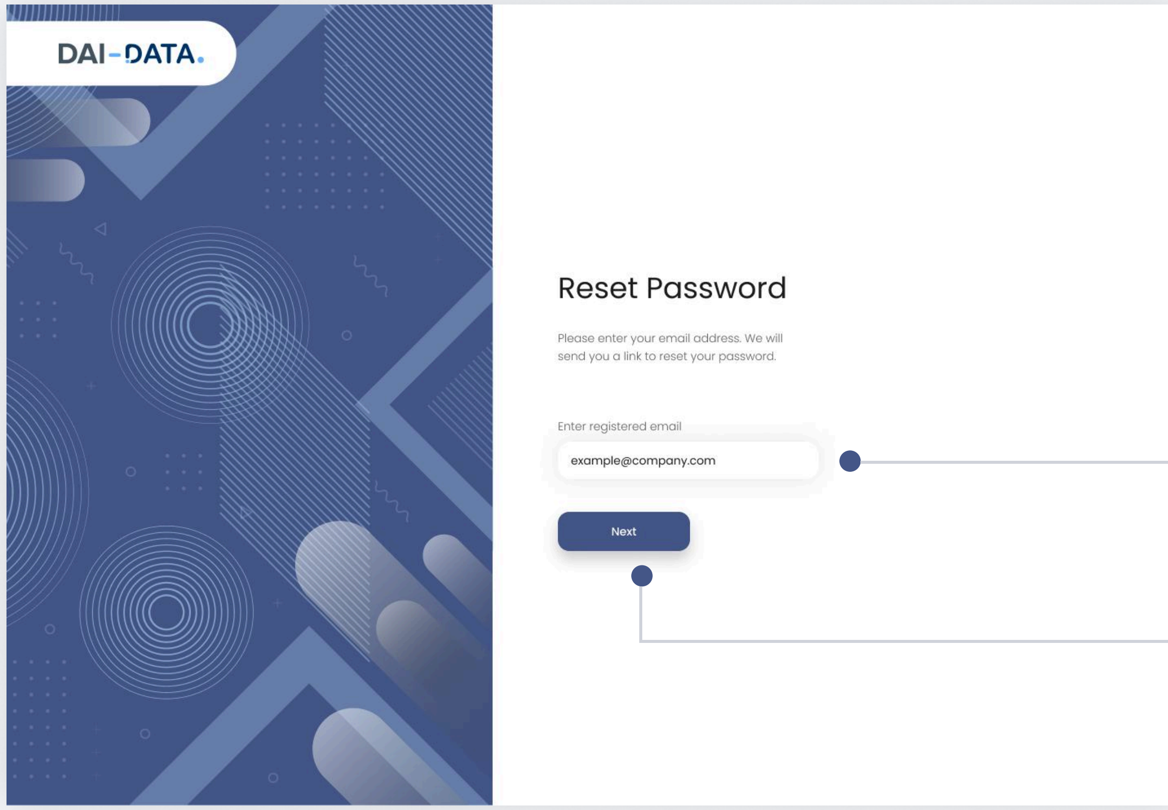
5 Reset password

Follow the steps In case you forgot your password.



Step 1

Click on the "Reset Password' to initiate a password reset process.



Step 2

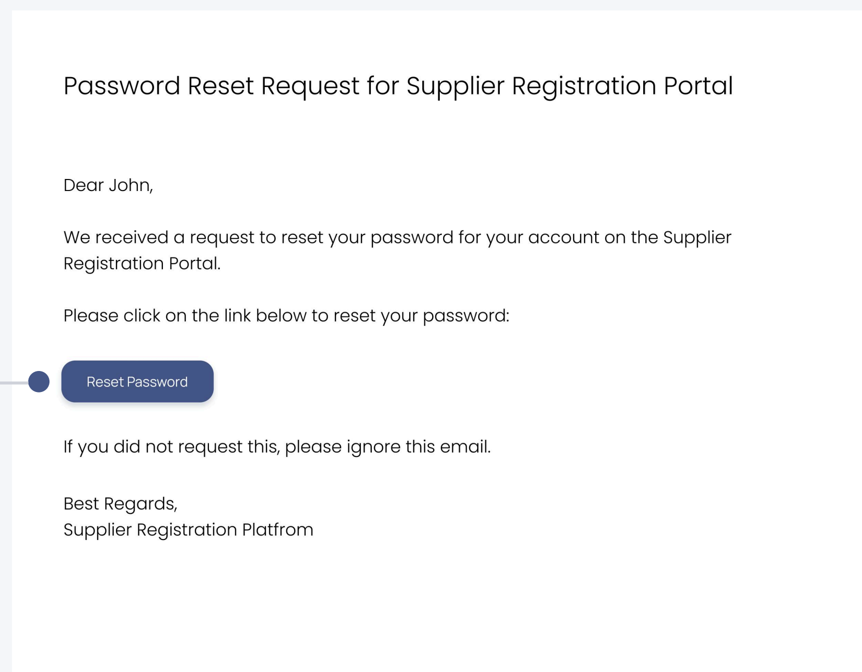
Enter your Registered Email ID.

Step 3

Click on the 'Next' button.

Step 4

Check your Email inbox. You would have received an Email to Reset your password in your registered Email ID.



Password Reset Request for Supplier Registration Portal

Dear John,

We received a request to reset your password for your account on the Supplier Registration Portal.

Please click on the link below to reset your password:

Reset Password

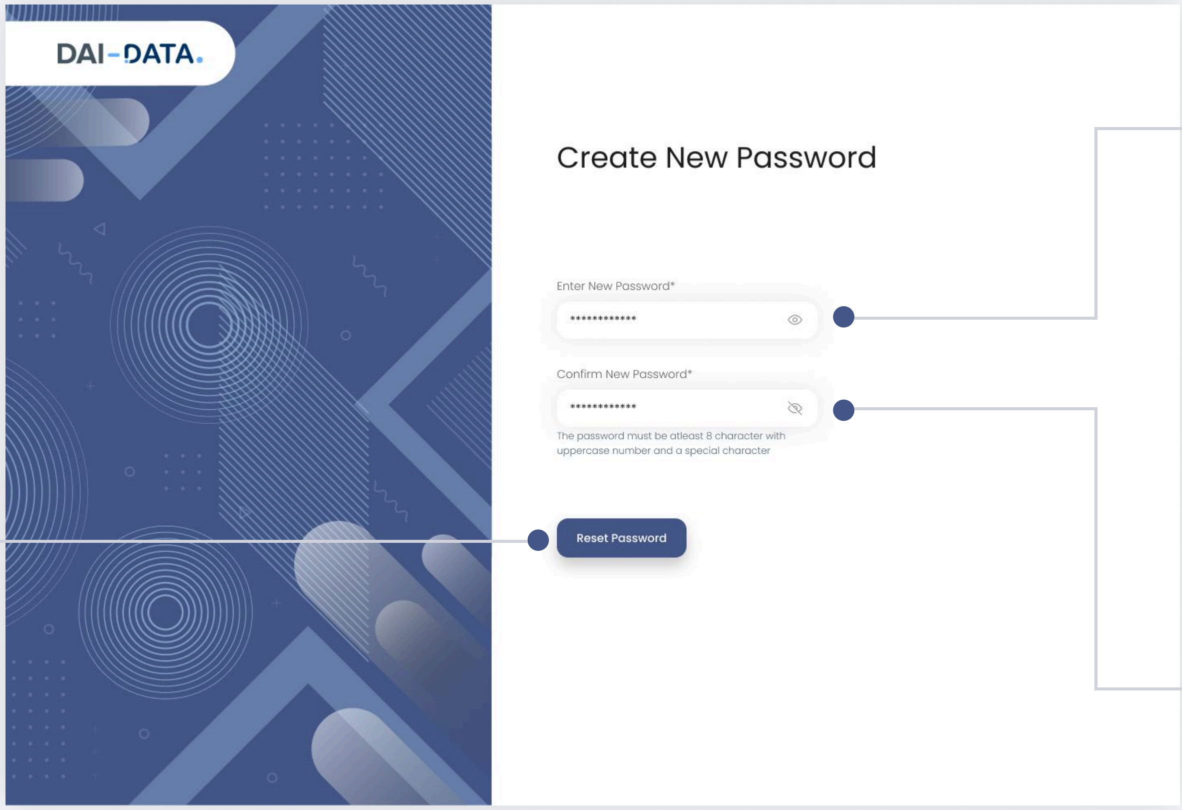
If you did not request this, please ignore this email.

Best Regards,
Supplier Registration Platfrom

Step 5

Click on the 'Reset Password' button.

You will be redirected to another screen where you can create new password.



Step 6

Enter your new password.

> **Note :**
>
> Make sure that the password is at least 8 character with uppercase, number and a special character in it.

Step 7

Confirm your new password.

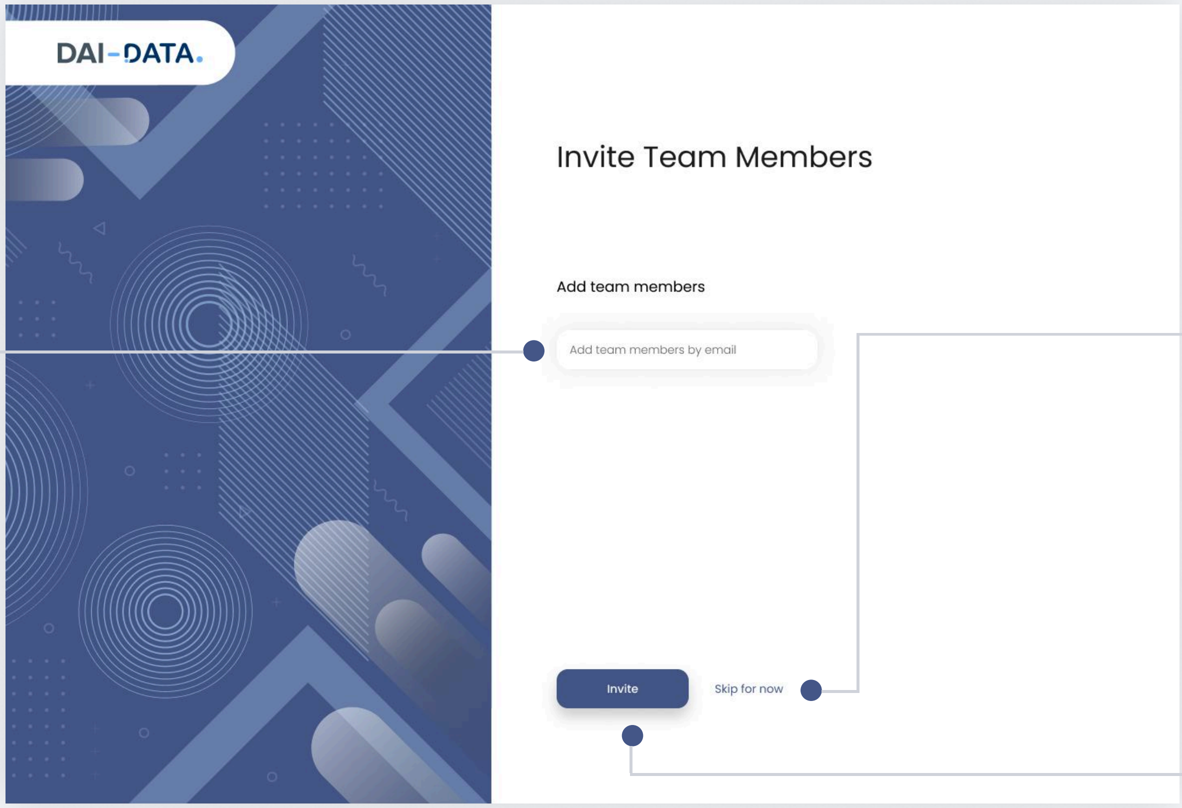
Step 8

Click on the '**Reset Password**' button.

You will be taken to the sign in page where you can sign in using the new password.

4 Inviting team members

As you sign in you will see a page where you can invite your Team Members.



Step 1

You can add your team members by entering their e-mail ID in the field provided.

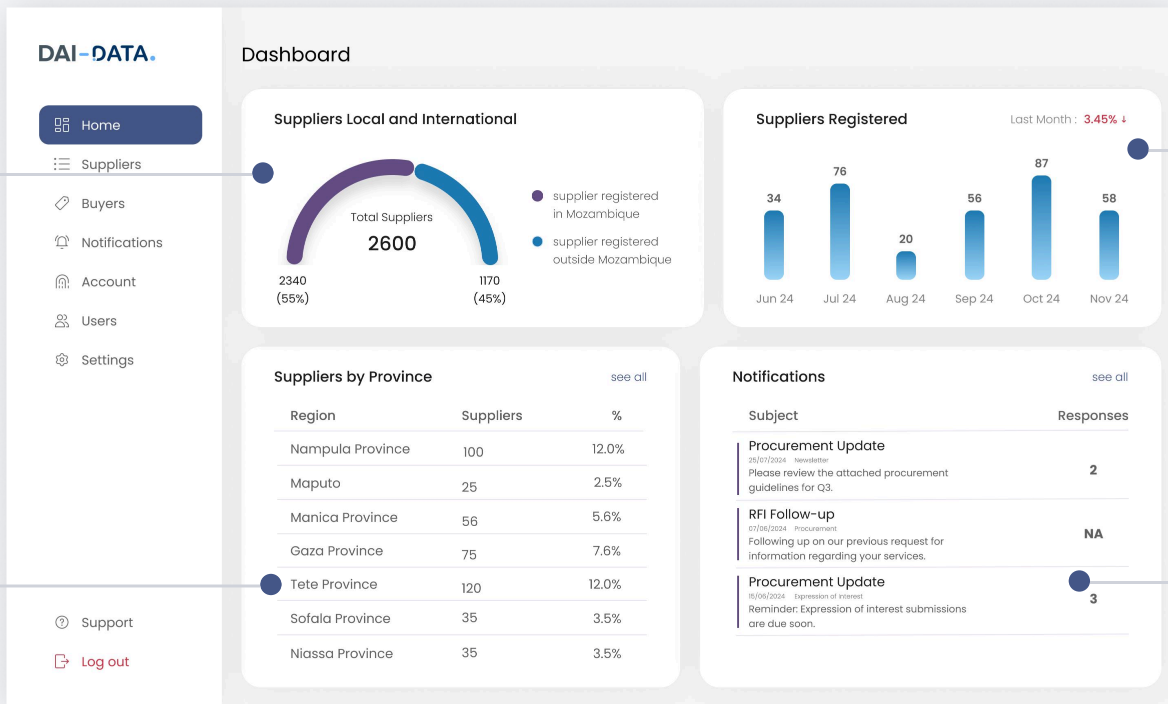
> **Note :**
>
> If you prefer not to invite team members immediately, click on the '**Skip for now**' to proceed without sending invitations.

Step 3

Click on the '**Invite**' button.

Home page

After sending the invite to team members or if you click skip for now, you will be directed to the Home Page, where you can see:



Suppliers Local and International

These metrics track the status of supplier profiles, showing the number of total suppliers based in Mozambique and outside Mozambique.

Suppliers by Provinces

This area is intended to show supplier distribution by each Province.

Suppliers Registered

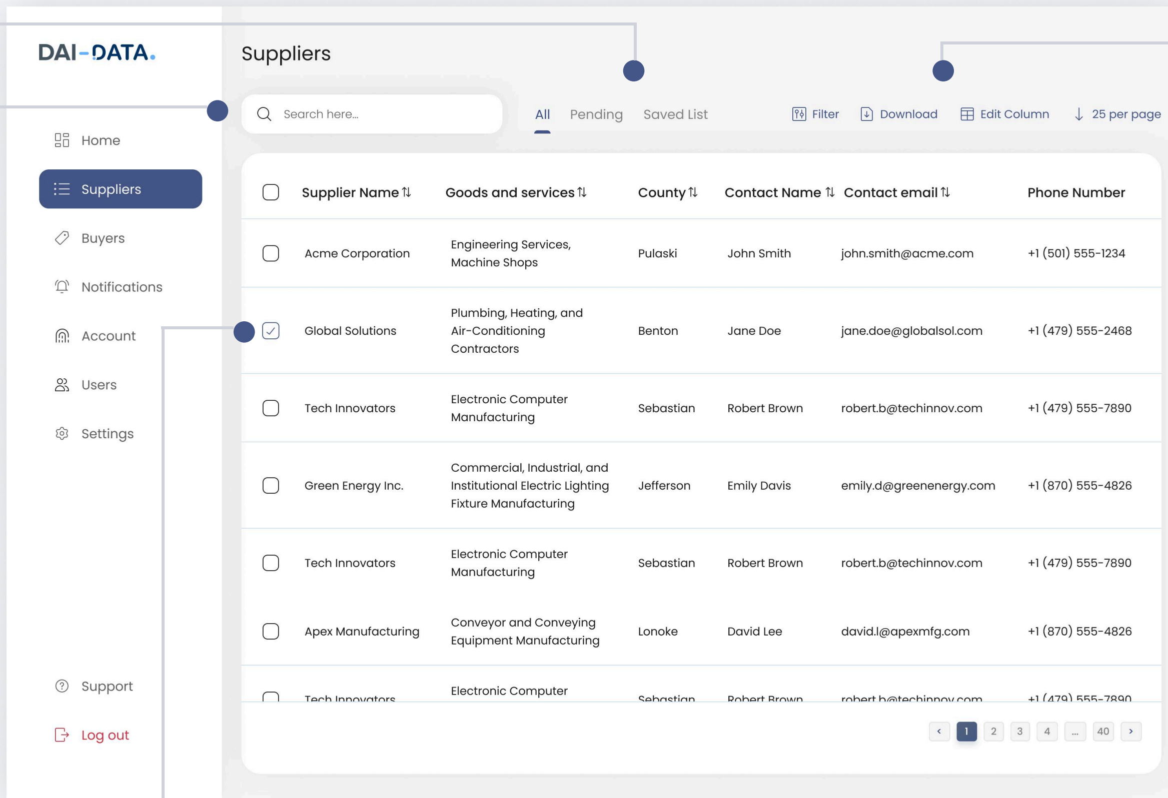
This section provides a detailed overview of the number of suppliers registered each month, over the past six months.

Notifications

Admin can check this section for any relevant notifications regarding suppliers.

Supplier management

Once you have onboarded your suppliers you can find their details in the columns. You can also see the number of suppliers registered.



All, Pending & Saved List

The Admin can choose to see the list of all suppliers registered with the company by clicking on the "**All**" option or "**Pending**" option to see the list of suppliers who are yet to be verified. The '**Saved List**' allows user to view personalized lists of suppliers.

Search supplier

Here admin can search for specific suppliers by entering keywords.

Download supplier data

You can also click on the check box and click on the download button to download the selected suppliers' details.

Supplier profile

You can click on each supplier to access more information

Filter

Here admin can search for specific suppliers by entering keywords and apply filters to narrow down their search results.

Download

This allows users to download the data of all the onboarded suppliers in a single click.

Edit column

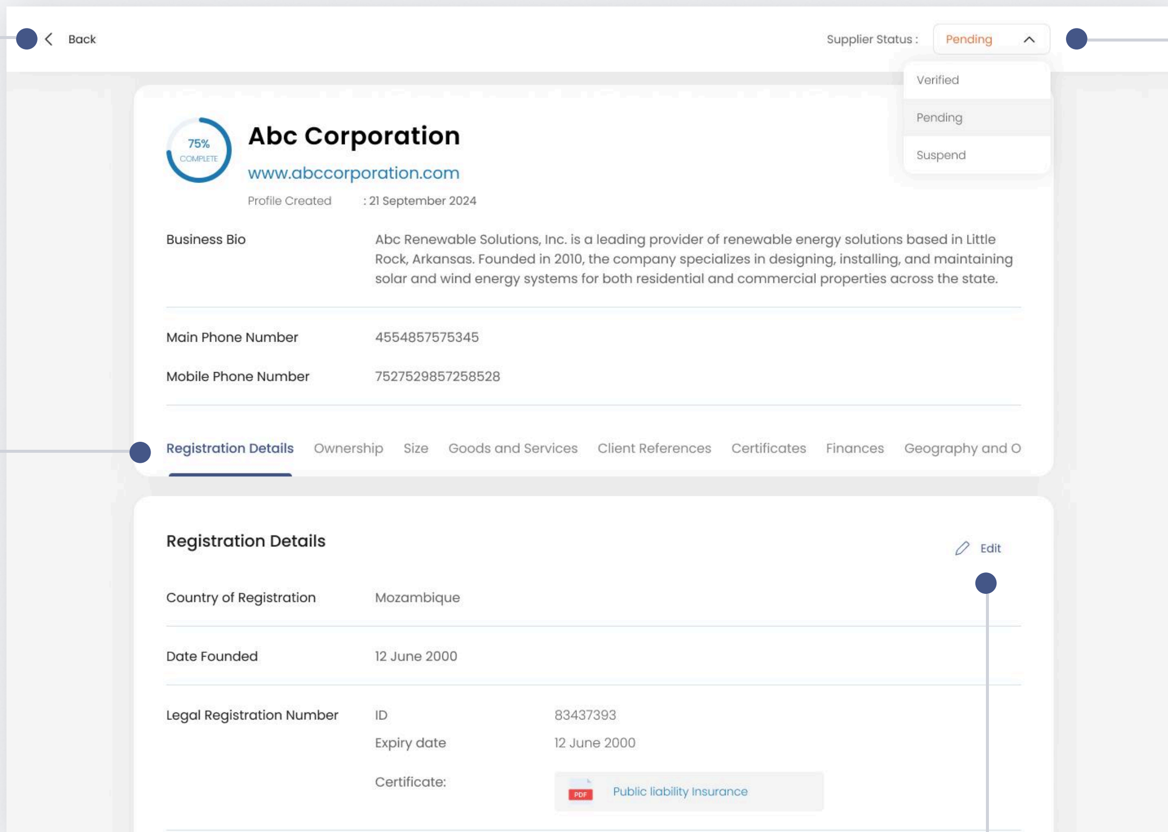
This allows users to customize the columns shown in the list.

Pagination

Admins can choose to display 25, 50 or 100 suppliers per page to manage the view of their supplier list.

Supplier profile

When you click on a specific supplier on the Supplier menu you can see the Supplier's profile with, Profile completion percentage and Supplier Status.



Click on the 'Back' button to go back to supplier menu.

In the supplier's profile you can see the sub menus such as Registration details, Ownership, Size, Goods and Services, Client References, Certificates, Finances, Geography & Others and Additional Documents.

Edit

You can add in or change the suppliers' details at any time by clicking on the **'edit'** button

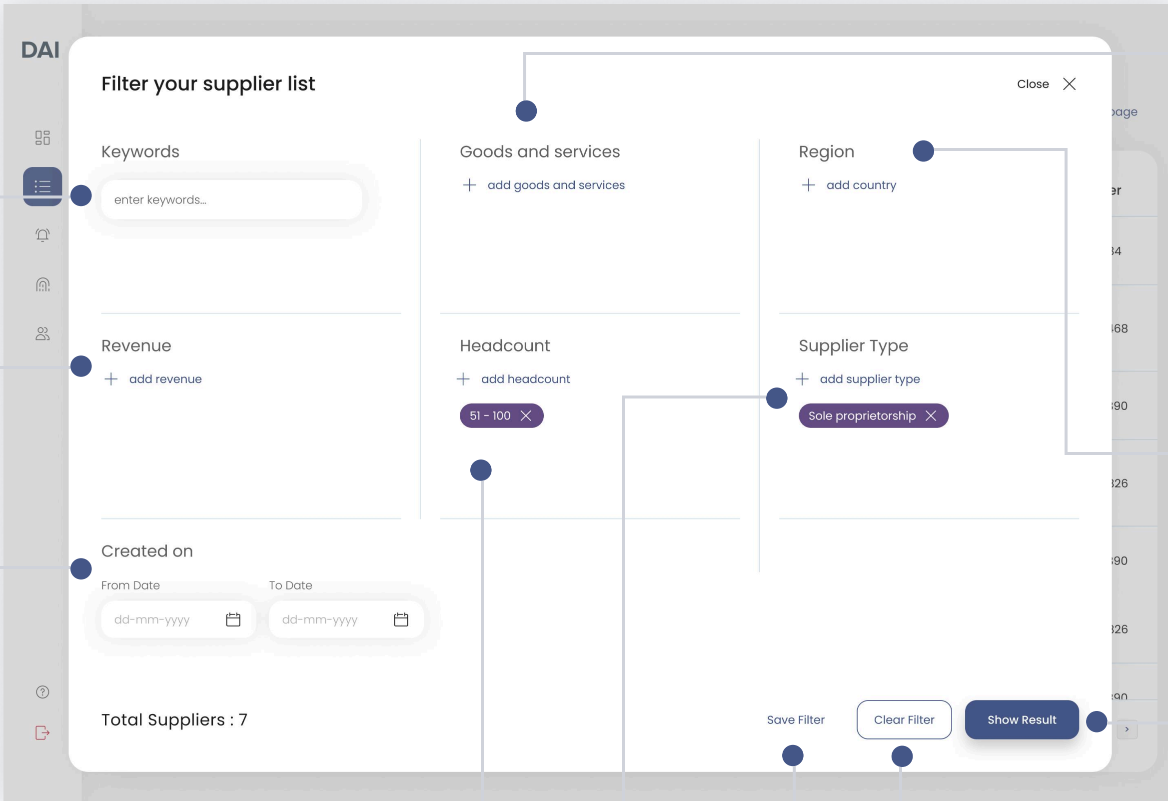
Supplier Status

You can change the Supplier Status by clicking on the drop-down option and selecting – Verified, Pending or Suspend option from it.

- If you are sure that all the provided information of the supplier is accurate and complete, select the 'Verified' option.
- If you think that the supplier profile needs further review or additional information is required, select the 'Pending' option.
- If you want to temporarily disable a Supplier, select the 'Suspend' option.

Filter your supplier list

You can filter your suppliers list in different ways. Applying these filters will help you to narrow down your search results which saves your time efficiently.



Keywords

Type specific keywords into the Keywords field to search for suppliers matching those terms.

Revenue

Click on the Revenue field to filter suppliers based on their financial size.

Created on

User can filter the suppliers based on the date their profiles were created by entering the date here.

Headcount

Click on the Headcount field to filter suppliers based on their number of employees.

Supplier type

Select the Supplier Type that best describes the kind of suppliers you are looking for.

Save filter

Click on the 'Save Filter' option to save the current filters applied for quick access to specific supplier list in future.

Goods and service

Click on the Goods and Services option to add or select the services or products provided by the suppliers, based on which your suppliers list will be filtered .

Region

Use the Region filter to select the geographical area relevant to your supplier search.

Show result

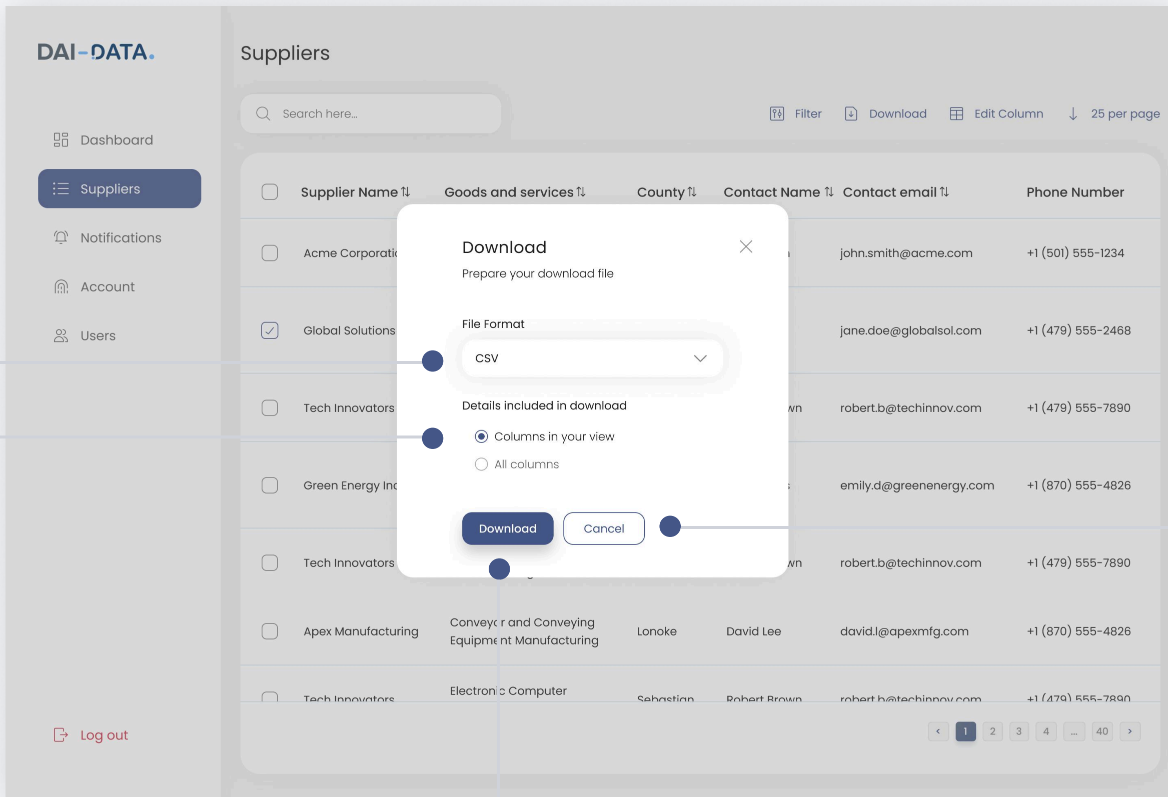
Once all the desired filters are set, click the 'Show Result' button to view the list of suppliers that match your criteria.

Clear filter

Click on the 'Clear Filter' button to clear all the filters that you have applied.

Exporting Suppliers

When the 'Download' option is clicked, a pop-up box appears which allows users to prepare their download file.



Select file format

Choose the format to download supplier data - csv or as excel format.

Details included in download

Choose the suppliers' details to be downloaded- Current view or all details of the supplier.

Cancel

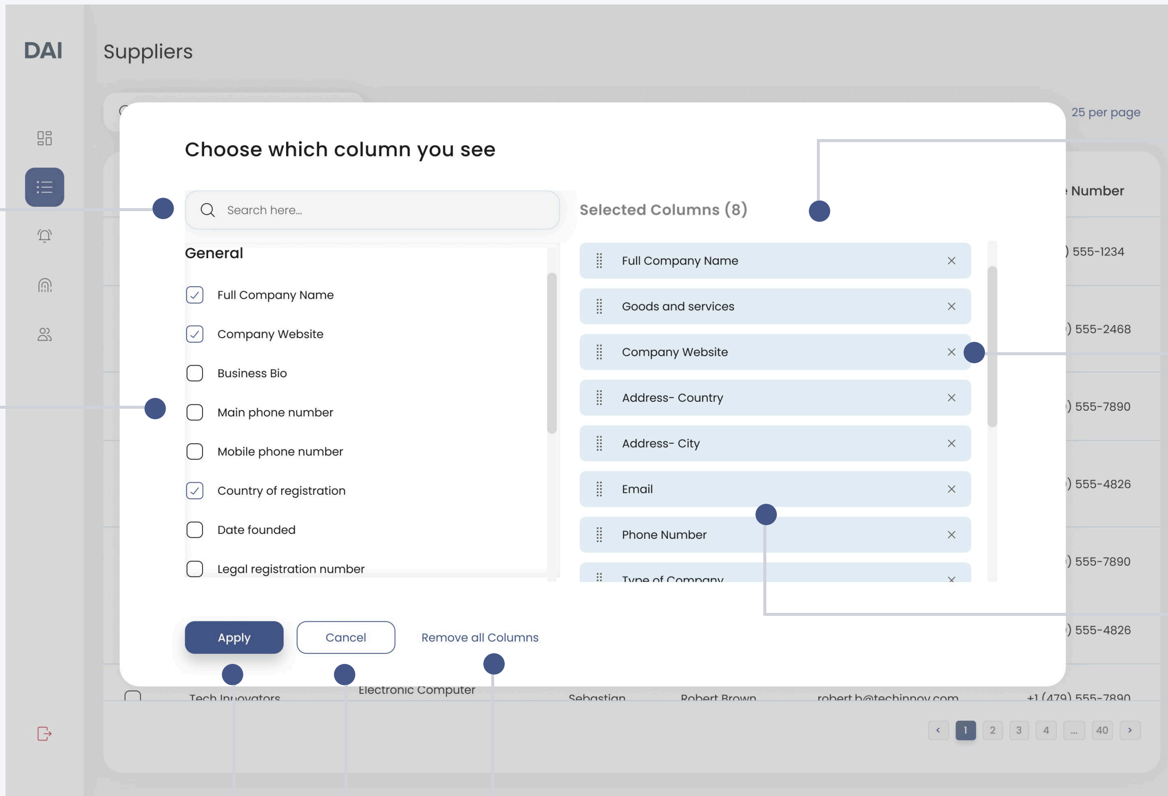
Click on the Cancel button to cancel the download process.

Download

Click on the Download button to download the supplier details in the preferred format.

How to edit columns?

Follow the steps.



Note:

Use the Search Properties field to quickly find specific columns you want to add.

Step 1

Choose the columns you wish to see from the available options: General, Registration details, Ownership, Size, Services, Client References, Certificates, Finances and Geography.

Step 2

Review the Selected Columns list

Note:

Click the "X" to remove individual columns you no longer want to display.

Step 3

Drag and drop to change the order in which the columns will appear.

Step 4

Once you've selected, removed, or rearranged the columns to your preference, click the 'Apply' button to update your view.

Cancel

If you decide not to make any changes, click the Cancel button to exit without saving.

Remove all columns

Click Remove All Columns to remove all selected columns at once.

Buyers Management

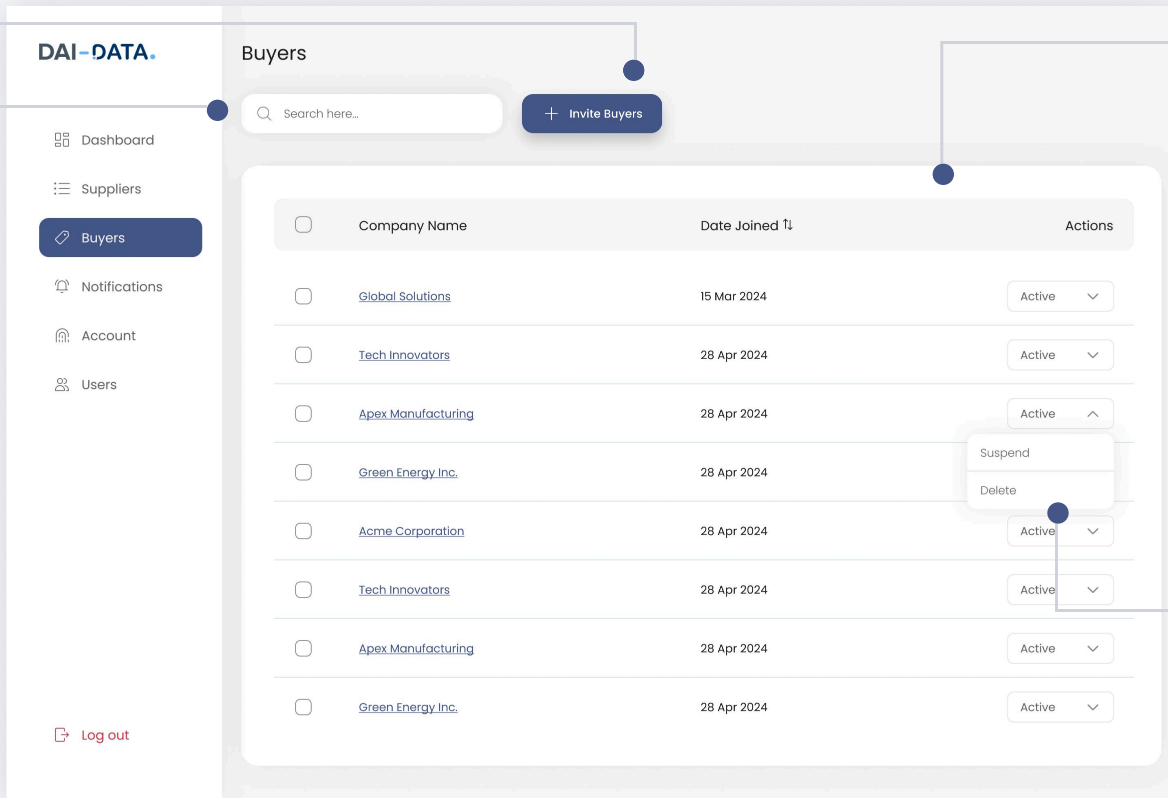
Once you have onboarded your buyer companies you can view them on this page by clicking on the buyers menu.

Invite Buyer

The 'Invite Buyer' button starts the process of adding a new buyers to the system.

Search Buyer

This field allows admins to search for specific users by entering relevant keywords, helping to quickly locate buyers registered in the system.



Once you have onboarded your buyers you can find their details in the columns.

Note :

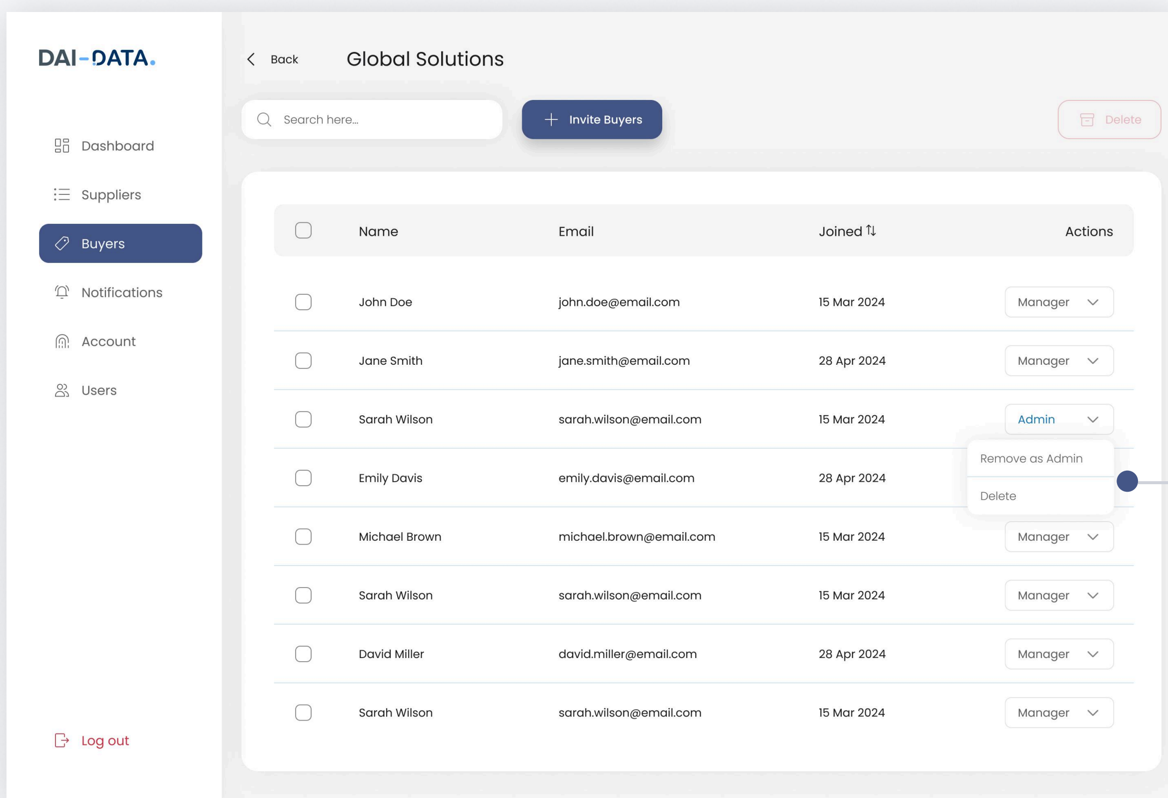
You can click on each buyer to access more information about them.

Actions

You can Enable, Suspend or Delete a buyer by clicking on the drop-down option

Buyer Managers

When you click on a specific buyer on the Buyers menu you can see the list of their buyer managers.



Delete

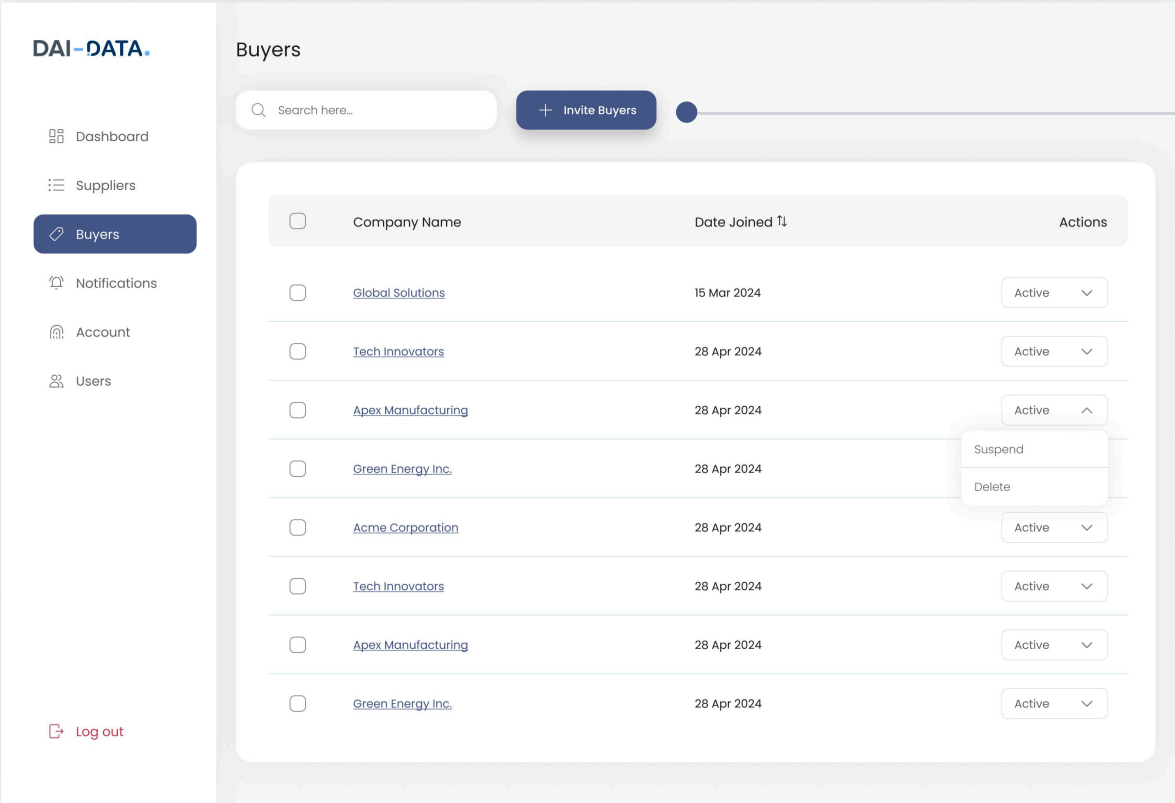
This button allows the admin to remove one or more users from the system by clicking on the check box.

Actions

The tenant admin can change the user's role to Manager or Admin and delete the user under the action tab, providing elevated access and permissions.

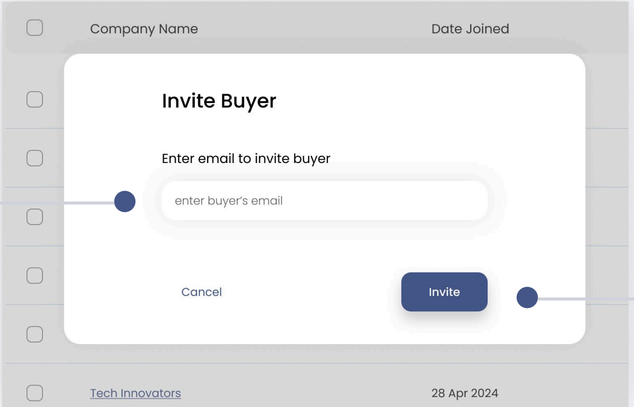
Invite Buyers

Follow the steps to invite buyers



Step 1

Click on the 'Invite Buyers' button.



Step 2

you can see a pop-up box where you can enter buyers' email ID.

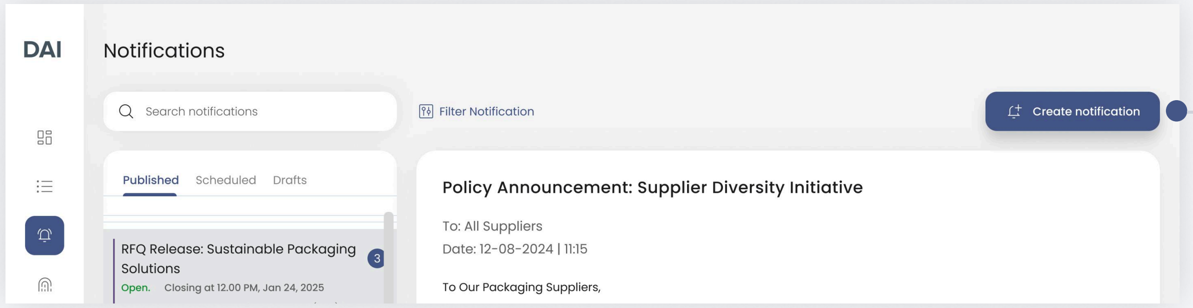
Step 3

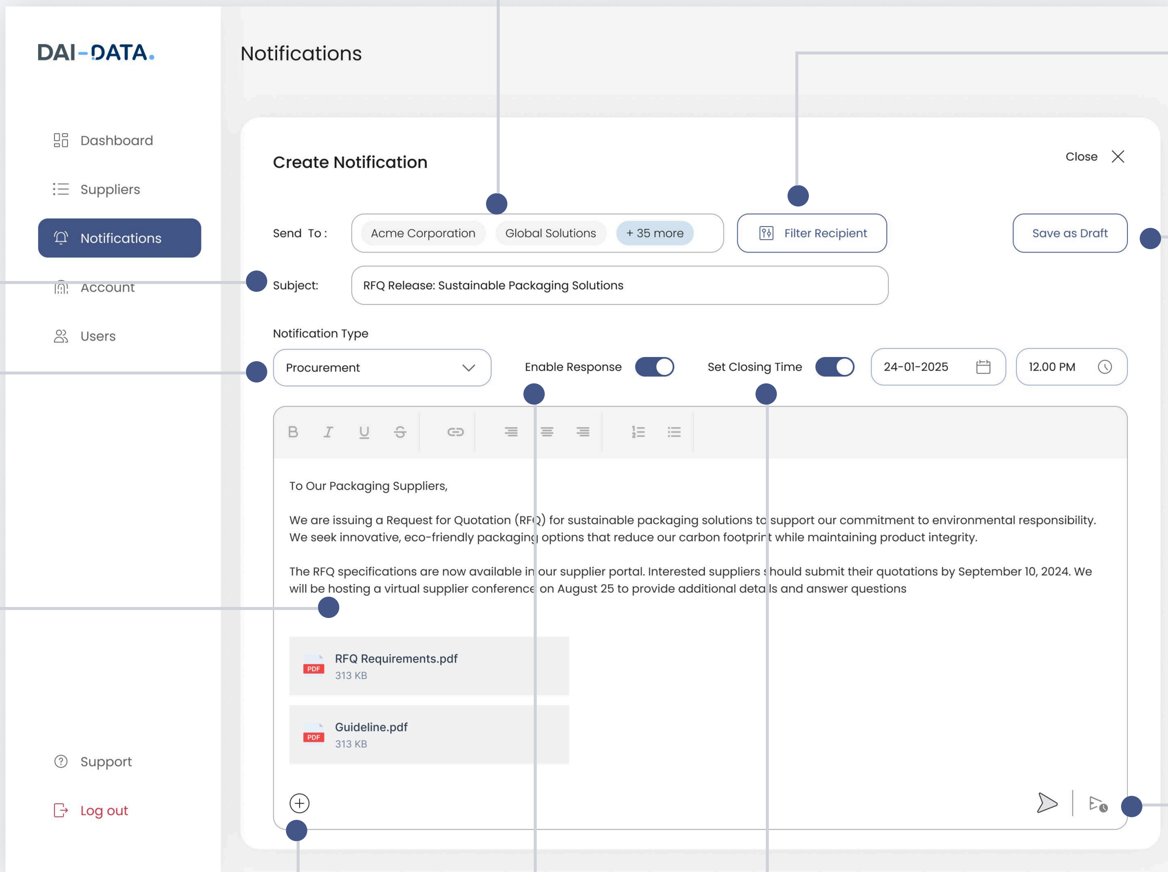
Click on the 'Invite' button.

It sends out the invitations to the specified buyers email, prompting them to join the system.

How to create notifications?

Follow the steps.





Step 1

Click on the '**Create notification**' button on notification menu.

A page appears, where you can create notification.

Step 2

Admins can specify recipients by typing @ for all members or selecting specific company names. This ensures the notification reaches the intended audience.

Step 3

In the subject field, enter the title or main topic of the notification.

Step 4

Select notification type from the list.

Step 5

In this field, write the content of the notification, detailing the message you want to convey.

Step 6

Attach relevant files or documents to provide additional information along with the notification.

Filter Recipients

This feature allows admins to filter recipients based on various criteria, providing more control over who receives the notification.

Save as Draft

Admins can save notifications as drafts by clicking the '**Save as Draft**' button, allowing them to return and edit them later.

Step 7

Admins can choose to '**Send Now**' for immediate delivery or '**Send Later**' to schedule the notification for a future time.

Enable/Disable Response

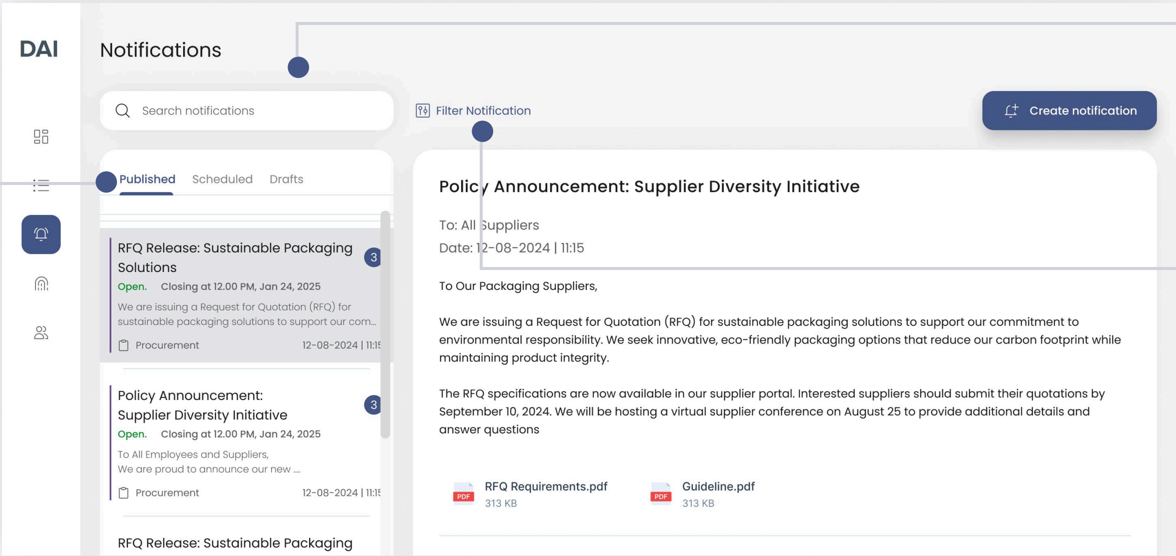
Admins can choose to enable or disable responses from recipients, depending on whether feedback is desired.

Set Closing Time

Admins can set a closing time by selecting a date and time. After the closing time, recipients will no longer be able to send responses.

Notification Category

Notifications are categorized into 'Published' and 'Scheduled' and 'Drafts' to distinguish between those that are active, those set for future release and those that you need to save for further editing or review, ensuring you can refine your content before it goes live.



Search

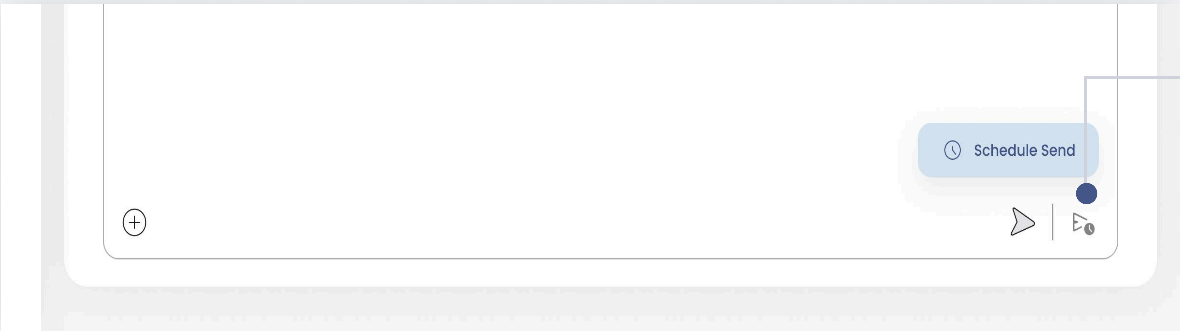
This field allows admins to search for specific notifications by entering relevant keywords.

Filter Notification

You can filter notifications by selecting the desired type and status.

How to schedule notification?

Follow the steps.



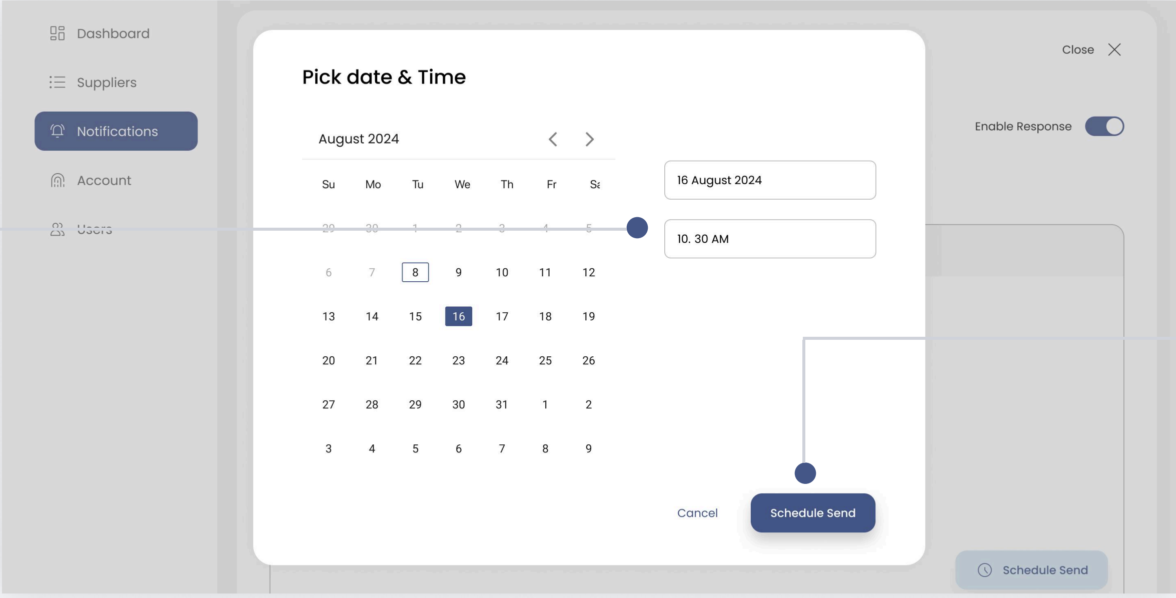
Step 1

Click on the 'Schedule send' icon to schedule a notification.

A pop-up appears, where you can select or enter the time and date.

Step 2

Select or enter date and time



Step 3

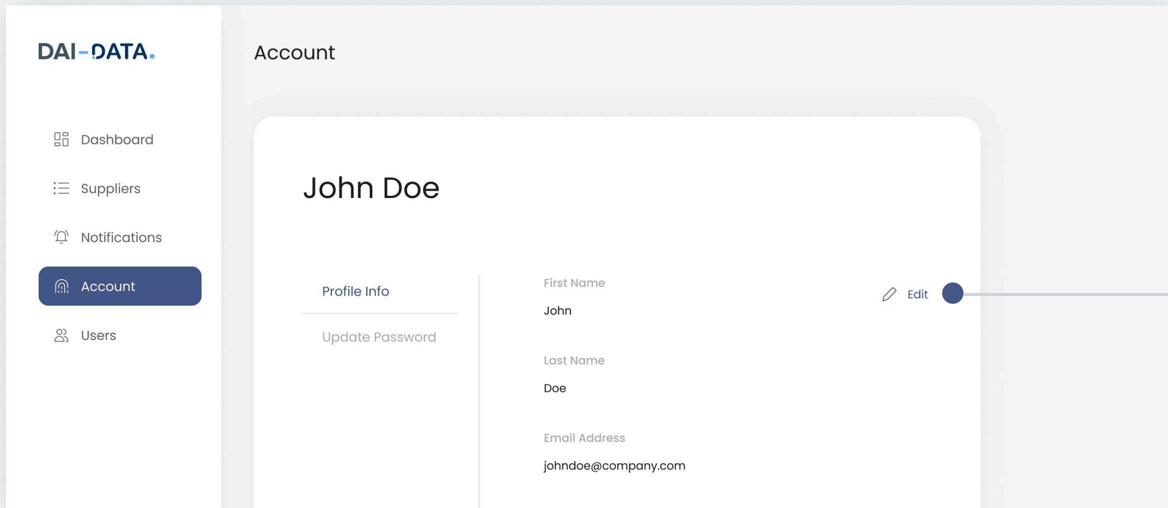
Click on the 'Schedule Send' button

Manage account details

In the Account menu you can view or change your profile information like your first name, last name and email address and you can also update your password.

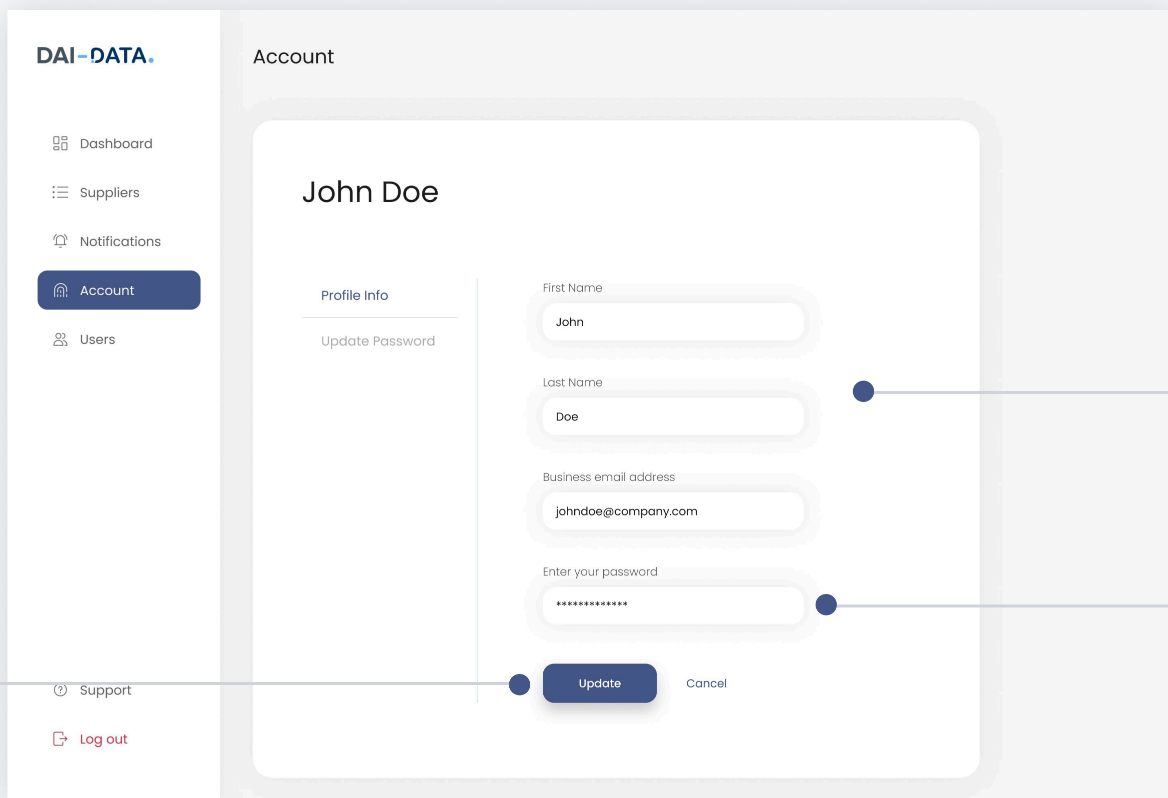
1 How to update personal profile information?

Follow the steps



Step 1

To make changes to your account information click on the 'Edit' button.



Step 2

Edit your details.

Step 3

Enter your password.

Step 4

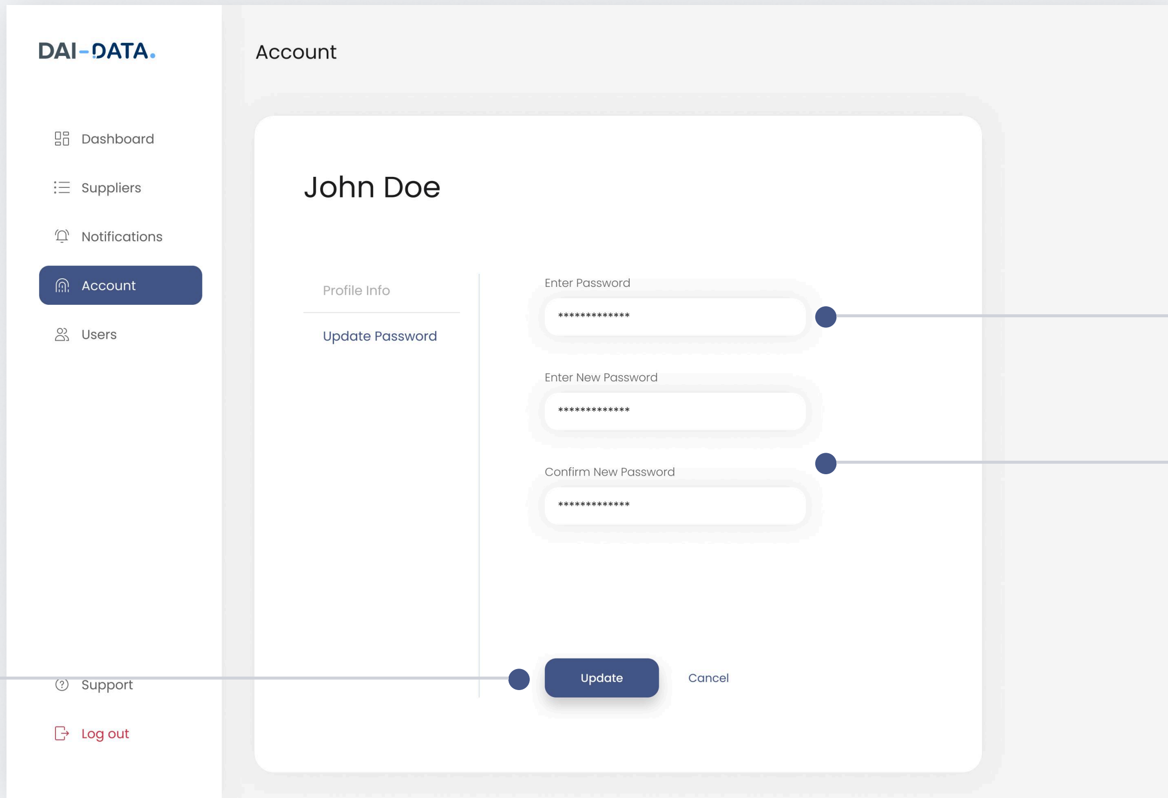
After making the changes click on the 'Update' button.

2 How to change password?

Follow the steps

Note:

Make sure that the password is at least 8 character with uppercase, number and a special character in it.



Step 1

Enter your current password.

Step 2

Type in your new password and retype it in the confirm the new password column.

Step 3

Click on the 'Update' button.

Manage team members

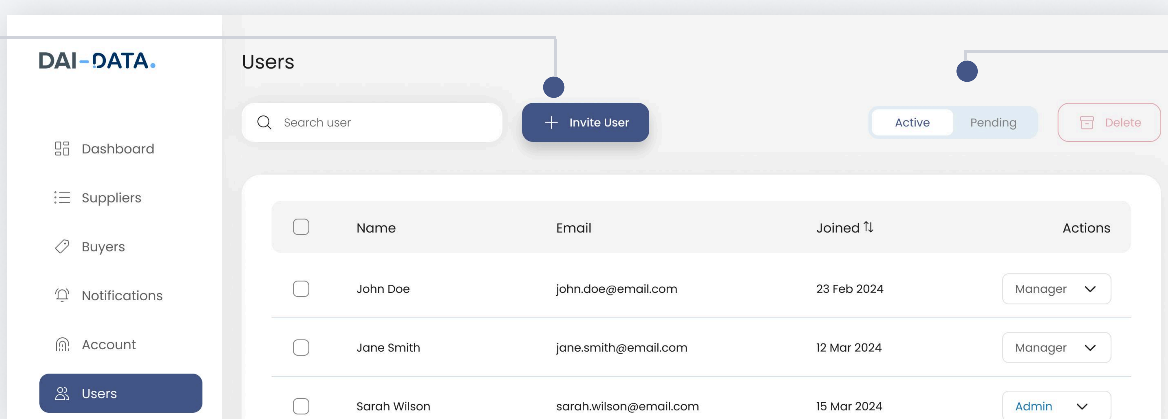
In user tab you can view or add your team members. **This feature is available only if you are an admin on the platform.**

1 How to invite team members?

Follow the steps

Step 1

Click on the 'Invite user' button.

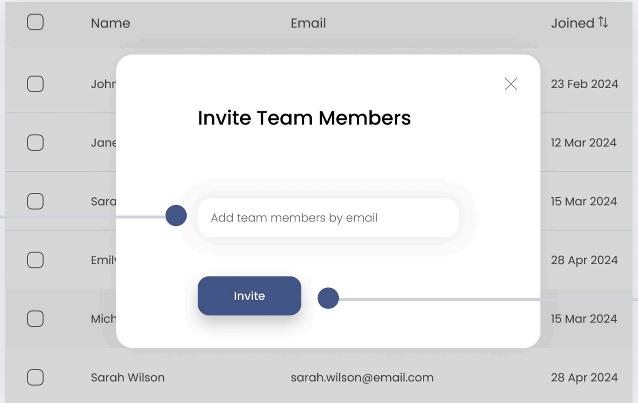


Active & Pending Users:

Active Users: Users who have successfully registered on the portal.
Pending Users: Users who have received an invitation but have not yet completed their registration.

Step 2

you can see a pop-up box where you can enter your team members' email ID.



Step 3

Click on the 'Invite' button.

It sends out the invitations to the specified team Members email, prompting them to join the system.

2 How can a team member register on this portal?

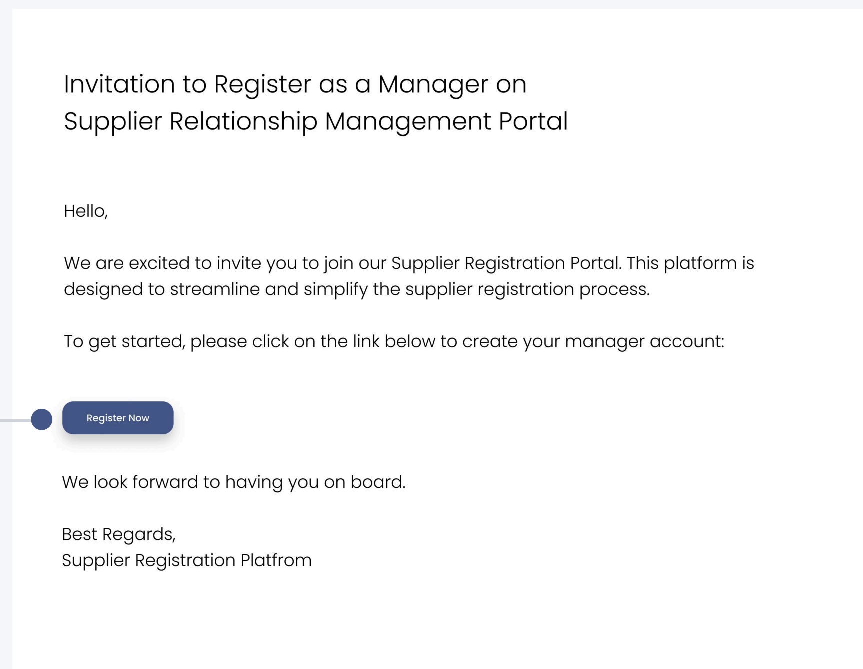
Your Team members would receive an invitation email like this.

Step 1

Check the email for the invitation

Step 2

Click on the 'Register Now' button on the email. They will be directed to the Registration page.

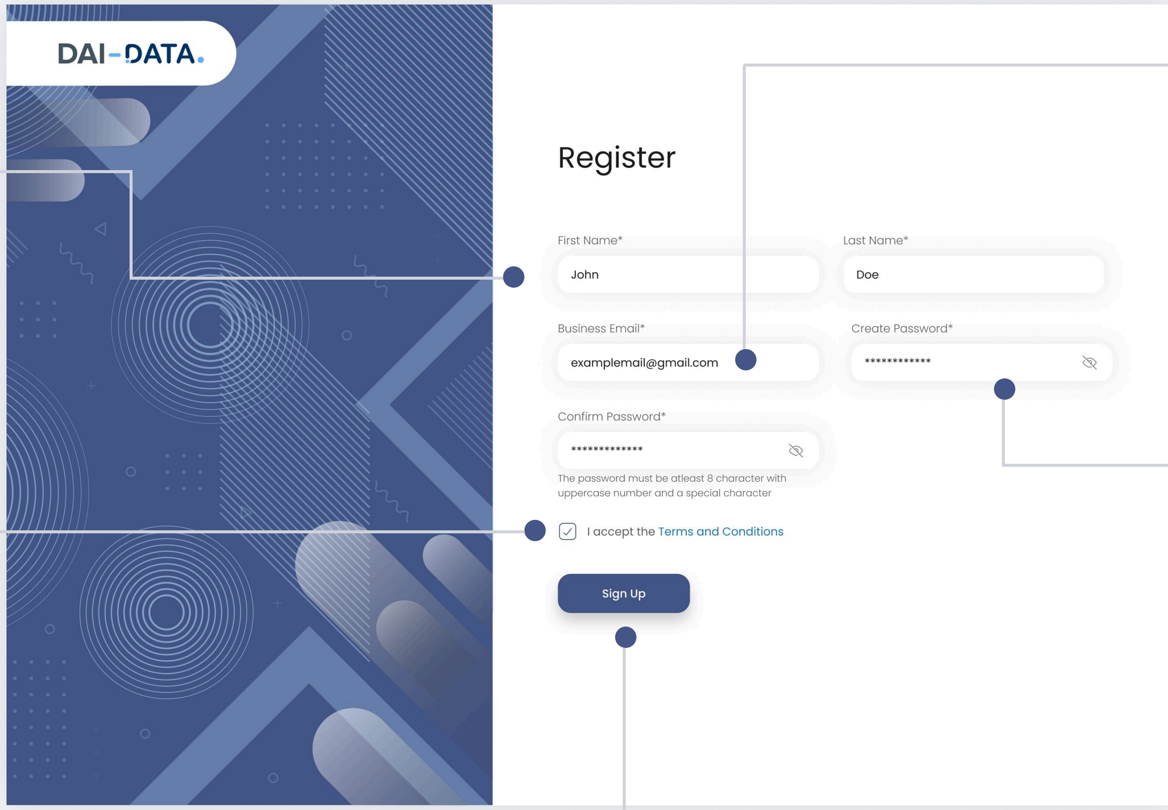


Step 3 : First Name and Last Name

These fields require the team member's first and last names. Both fields are mandatory, indicated by the asterisks.

Step 6

Go through the Terms and Conditions and click in the checkbox. The user must check this box to indicate that they accept the Terms and Conditions before completing the registration. It's a necessary step for legal compliance and to finalize the account creation.



Step 4 : Business Email

The business email address is used for account identification and communication. Users registered email ID can be seen in this field.

Step 5 : Create & Confirm Password

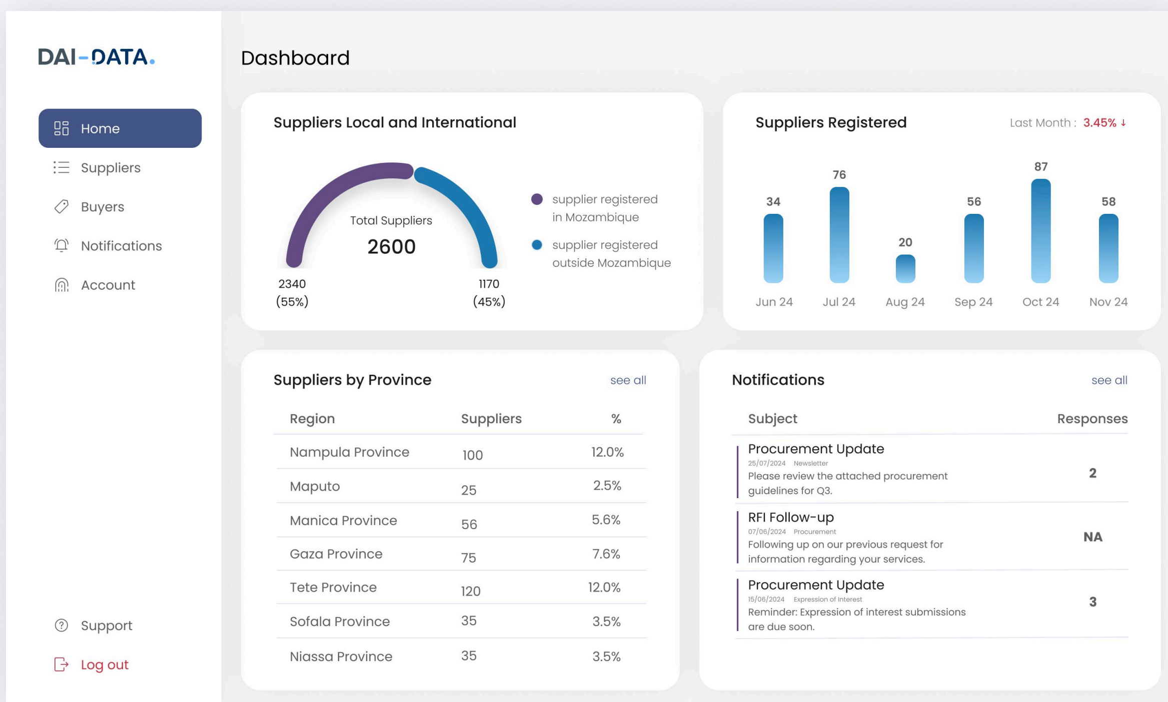
Users must enter a password and confirm it by entering it again. Make sure that the password is at least 8 character with uppercase number and a special character in it.

Step 7: Sign Up

Clicking 'Sign Up' submits the registration form and creates the account for the new team member.

Team member (Manager Access)

As managers, team members can only view and manage the Home, Suppliers, Buyers, Notification and their account page.



3 Delete active team member(s)

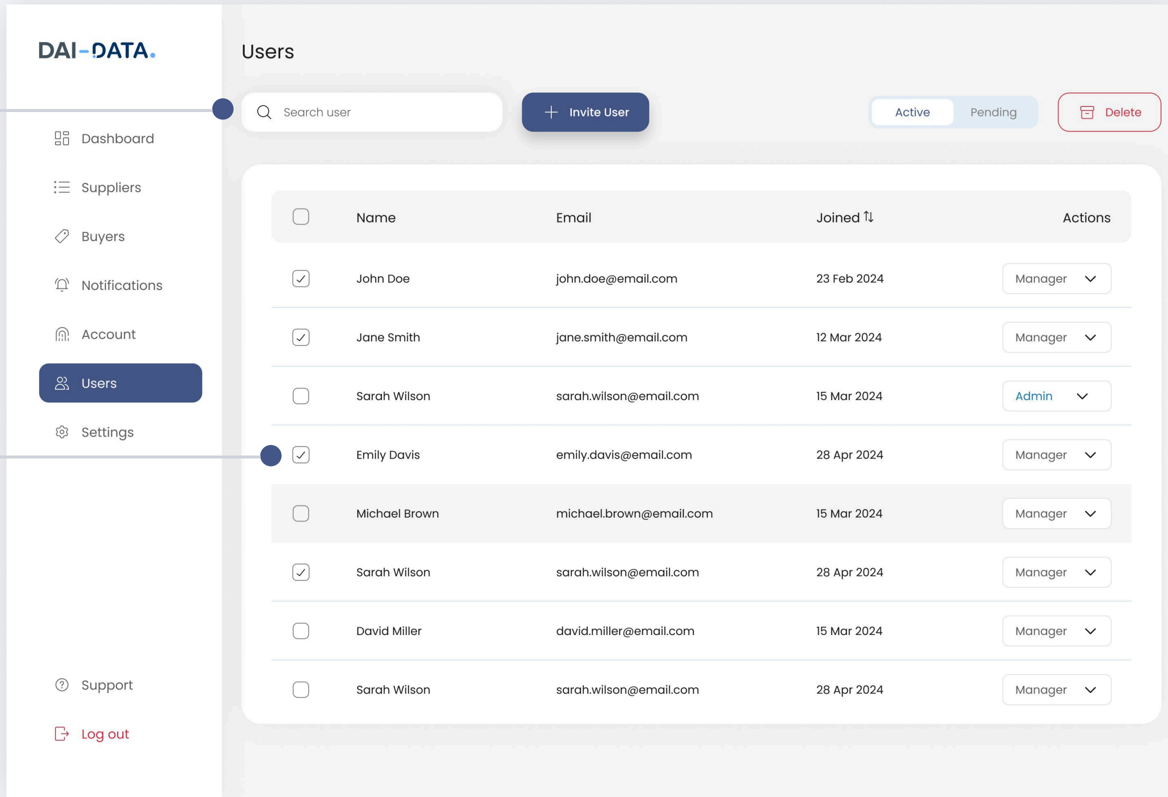
Follow the steps

Search

You can search your team member by entering their name or email address.

Step 1

Select the team member(s) that you wish to delete from your portal

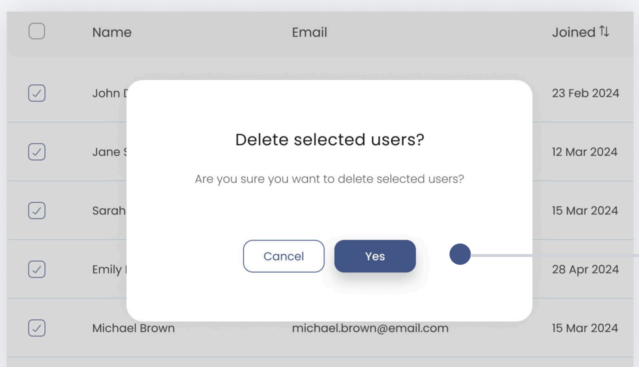


Step 2

Click on the '**Delete**' button

Note:

You can also delete a member by clicking on the drop down menu next to their detail and selecting the delete option.

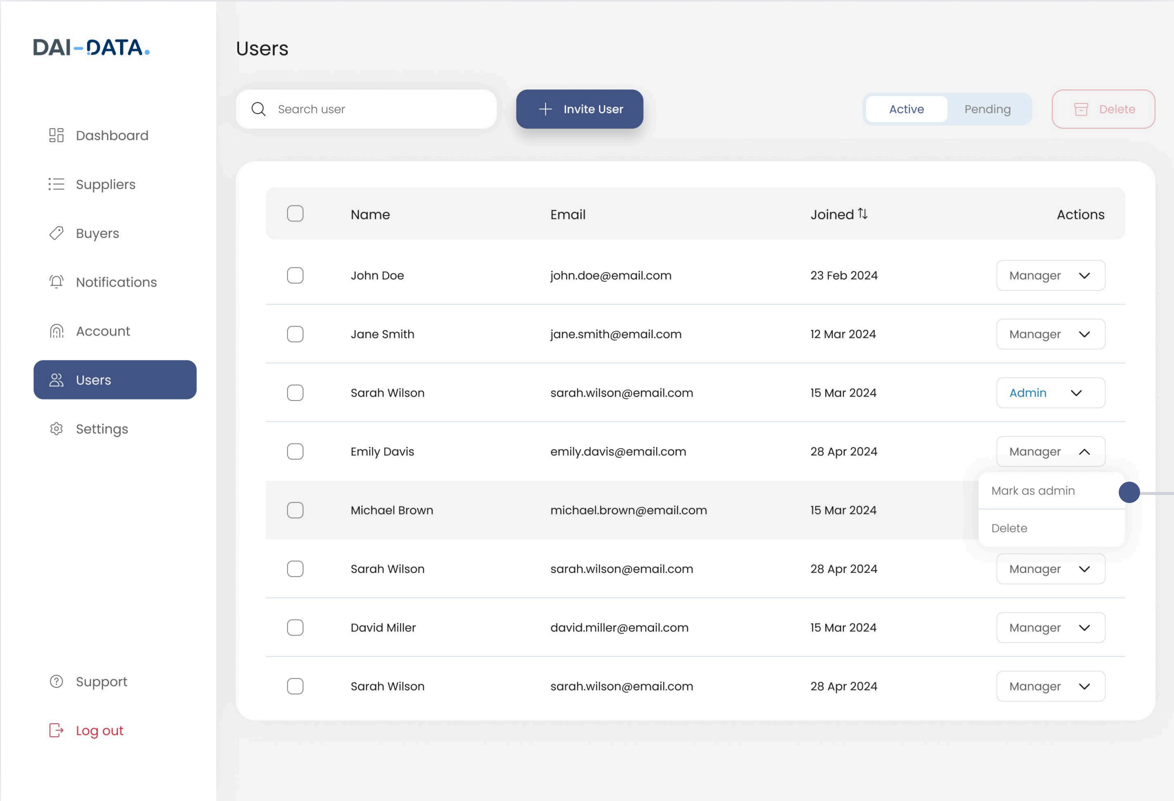


Step 3

In the pop up box that appears, confirm the deletion of the selected account(s) by clicking the '**Yes**' button.

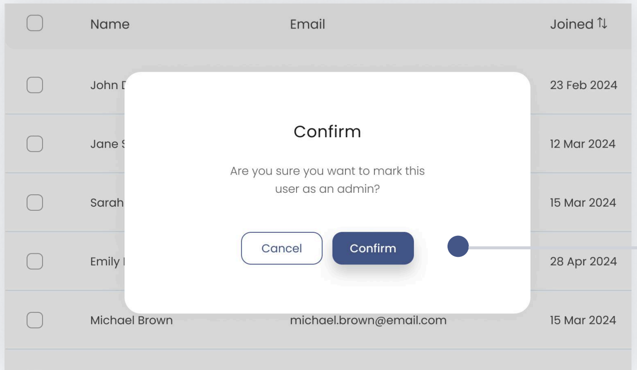
4 How do I make a team member an admin?

You can choose any of your team member and appoint them as the admin of this page by clicking on the drop-down menu.



Step 1

Click on the drop-down menu and select 'Mark as Admin' option.



Step 2

In the pop up box that appears, confirm the role change of the selected user by clicking the 'Confirm' button.

Note:

The tenant admin can also change the role of admin to manager.

5 Resend invitation to team member(s)

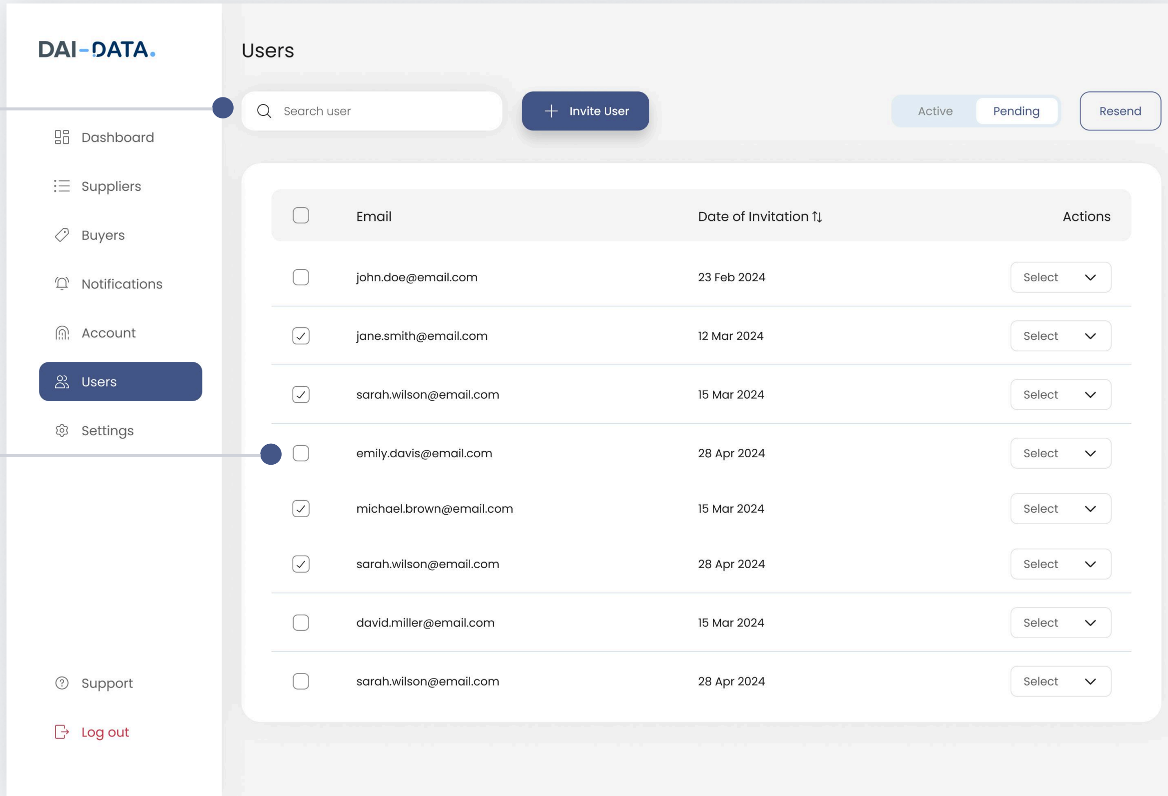
Follow these steps to resend an invitation to a team member who has not yet registered on the portal.

Search

You can search your team member by entering their name or email address.

Step 1

Select the team member(s) that you wish to Resend invitation.



Step 2

Click on the 'Resend' button

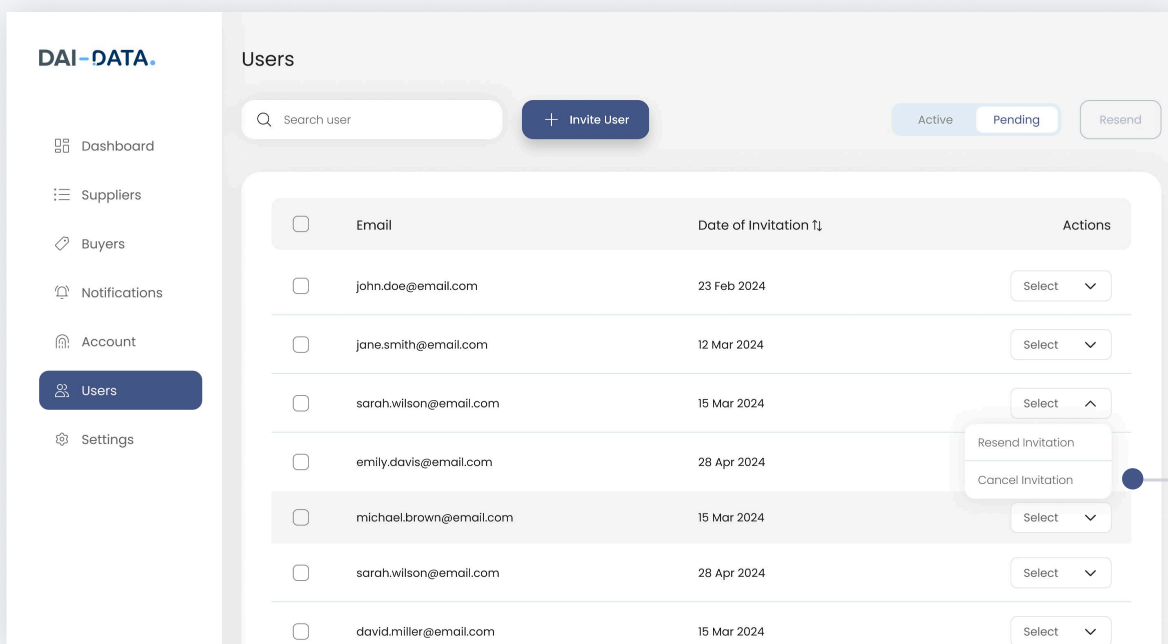
On the confirmation popup, click the 'Yes' button to resend the invitation to the selected team members.

Note:

You can also resend invitation by clicking the dropdown menu next to the member's details and selecting the Resend Invitation option.

6 Cancel invitation

Follow the instructions to cancel an invitation sent to a team member who has not yet registered on the portal.

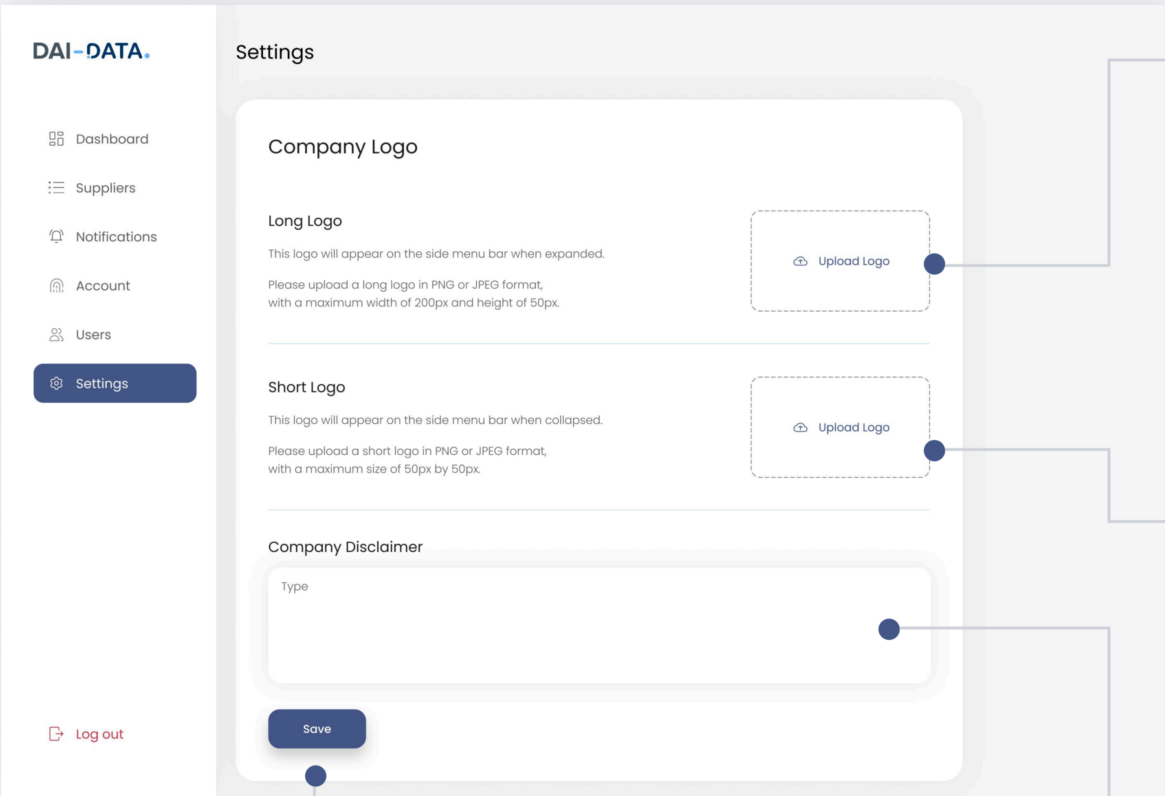


Cancel Invitation

You can cancel an invitation by clicking the dropdown menu next to the member's details and selecting the "Cancel Invitation" option.

Upload company logo and disclaimer

On the settings page you can upload company logo and add disclaimer.



Upload long logo

Admin can upload a long version of the company logo by clicking on the Upload Logo link. This logo will be visible when the side menu is expanded. The logo should be in PNG or JPEG format and fit within the specified dimensions with a maximum width of 200px and height of 50px.

Upload short logo

This section is for uploading a short version of the company logo, visible when the side menu is collapsed. Admin can upload a short version of the company logo by clicking on the Upload Logo link. The logo should be in PNG or JPEG format and adhere to the size limit with a maximum dimension of 50px by 50px.

Company disclaimer

This field allows you to add or update the company's disclaimer, ensuring that important legal or informational text is displayed as needed.

Click on 'Save' button

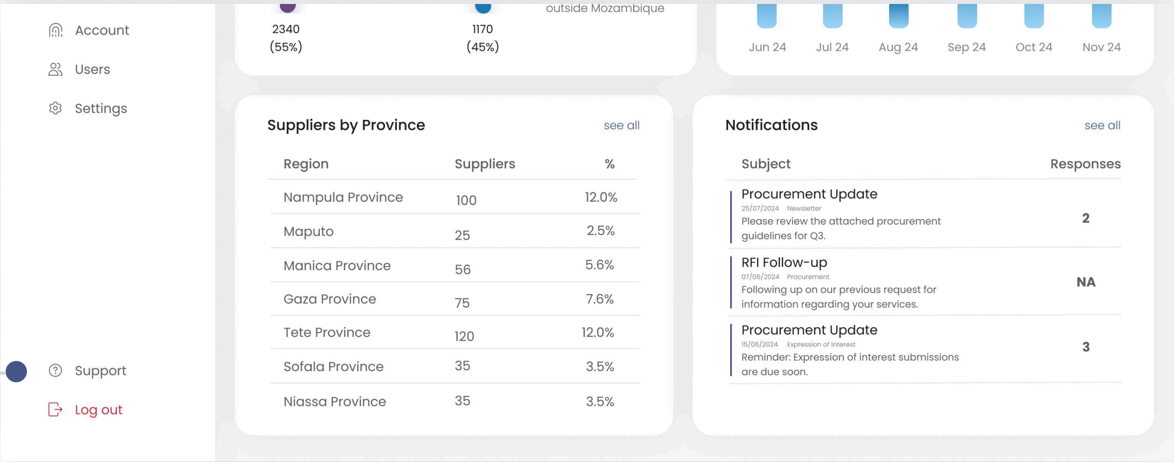
Clicking the 'Save' button applies and saves the uploaded logos and any changes made to the company disclaimer.

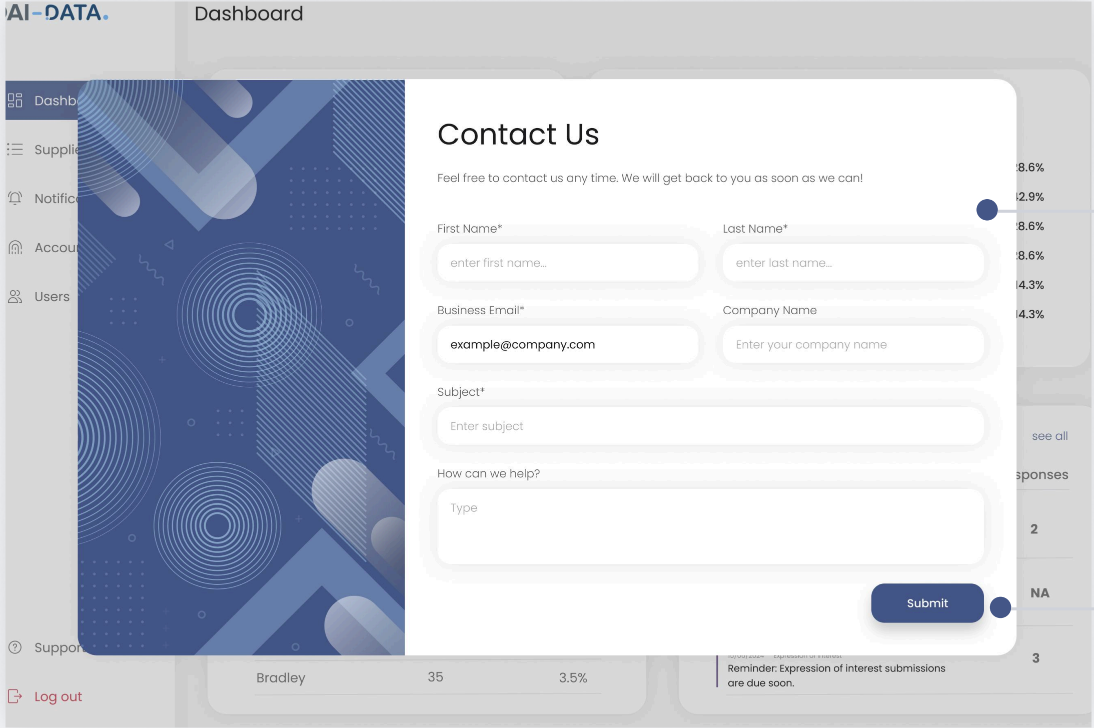
Support Option

Users can click on the support option to get assistance with issues, inquiries, or guidance related to the platform.

Step 1

Click on the Support option.





Step 2

In the pop-up box that appears, enter your details and issue or query you need assistance with.

Step 3

Click on the 'Submit' button.

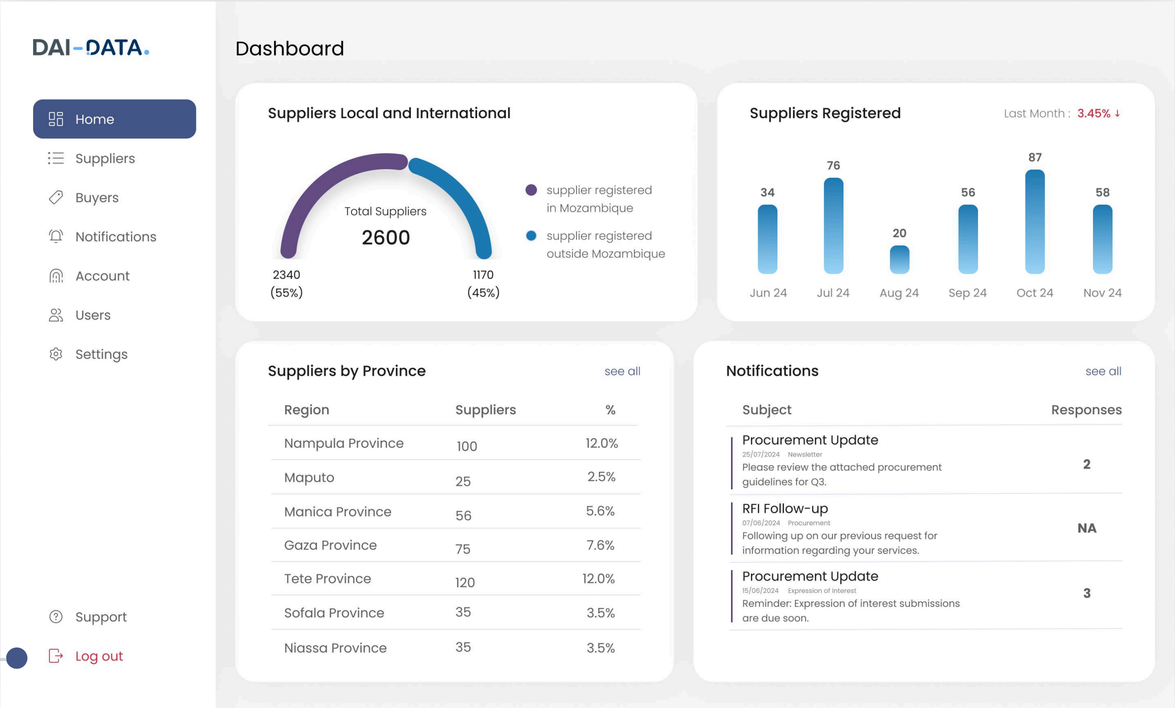
You will receive the assistance reply from the Customer support team.

How to log out of this portal?

Admin can click on the Logout button to securely exit their accounts or sessions.

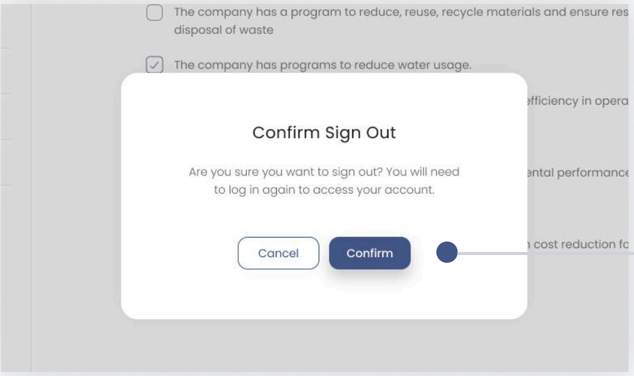
Note:

After you log out of this portal, you will need to log in again to access your account.



Step 1

Click on the 'Log out' button



Step 2

Confirm the sign out by clicking the 'Confirm' button.