VENDOR COLLABORATION PORTAL USER GUIDE



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1. PURPOSE

The NMISA Vendor Collaboration interface exposes a limited set of information about purchase orders and invoices. From this interface, a vendor can also reply to requests for quotation (RFQs), and view and edit basic company information.

1.1 VENDOR REGISTRATION USING THE COLLABORATION PORTAL

On approval the Prospective Vendor will get an email with a link for Vendor Registration

• The Prospective Vendor will click 'Accept Invitation'

From: Microsoft Invitations on behalf of National Metrology Institute of South Africa <invites@microsoft.com> Sent: Monday, May 18, 2020 2:24 PM To: </invites@microsoft.com>
Block future invitations from this organization. This invitation email is from National Metrology Institute of South Africa (nmisa.org) and may include advertising content. National Metrology Institute of South Africa has not provided a link to their privacy statement for you to review. Microsoft Corporation facilitated sending this email but did not validate the sender or the message.

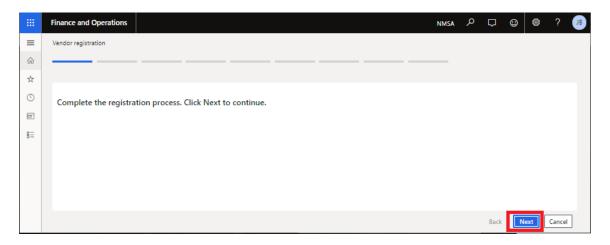
- Review the terms and conditions.
- Click on Accept.

thategopoultry@outlook.c	com
Review permissic	ons
N	
National Metrology Instit	tute of South Africa
This resource is not shar	ed by Microsoft.
The organization National South Africa would like to:	27
 Sign you in Read your name, ema 	il address, and photo
You should only accept if you tru of South Africa. By accepting, yo access and process your data to an account according to their po Institute of South Africa has ne privacy statement for you to re Institute of South Africa may log You can remove these permissio https://myapps.microsoft.com/n	u allow this organization to create, control, and administer licites. National Metrology ot provided a link to their eview. National Metrology information about your access. ns at
Cancel	Accept

After accepting, the Prospective vendor will be redirected to the NMISA ERP collaboration site.

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• Click Next.



- The user will select their country code.
- Click Next

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≡	Vendor registration									
(Ω) ☆	Country/region									
() E	Select the country or	r region from where you co	nduct business, and then click Next							
8:=	Country/region	Long name	7							
	ZAF	Republic of South Africa								
						Back	N	ext	Cancel	

- Enter company details on General Information
- Click Add on Address Information
- Enter Address
- Then click on **OK**
- Click Next

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Vendor registration											
Company information											
GENERAL INFORMATION					% of black youth ownershi	p % of militar		ownership			
Abcd FGHJ Telephone 0123456789	Fax Email abcd@gma	erging Micro Enterprise (E V	100.00	20.00	10.00		0.00		Level	1 contrib	iutor
ADDRESS INFORMATION + Add Ø Edit											
Name or description	Address	Purpose	Primary ↓								
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Vendor registration						New address	
Company information						Location ID 000110818	
company information						Name or description	
						Test Manual	
GENERAL INFORMATION							
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Abdc FGHJ	Organisation Emer	ging Micro Enterprise (E 🗸	100.00	20.00	10.00	ZIP/postcode	
Telephone Fax	Email	Website				0157 V	
0123456789	abc@gmail.c						
ADDRESS INFORMATION	abc@gman.c					Street 12 Test Manual	
+ Add 🖉 Edit Name or description	Address	Purpose	Primary ↓				
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						Celtisdal \checkmark	
						Primary	
						Yes	
						Primary for country/region	
						Yes	
						OK Cancel	

- Enter contact profile details on General Information
- Click Add on Address Information
- Enter Address
- Then click on **OK**
- Click Next

Finance and Operations			New address
Vendor registration			Location ID
Contact information ☆			000110819 Name or description
GENERAL INFORMATION First name Mic	lddle name Surname	Email	Telephone Purpose
Abcd	Fghj	abcd@gmail.com	Business V 0123456789 Country/region
ADDRESS INFORMATION + Add			ZAF ~ ZIP/postcode
Name or description	Address We didn't fin	Purpose Primary	y I D157 V Street 123 Test Manual City Centurion V Suburb Amberville V Primary Yes OK Cancel

- Enter business information.
- Click Next

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ŵ	(Alt+Shift+Home) Go to your default dashboard.									
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Ŀ	OWNERSHIP PROFILE	BUSINESS PROFILE	VAT number							
	Small business	Organisation number	123467/18/2020							
	Yes	1234/1805/2020	Tax state							
8	Locally owned	Line of business	South Afri \sim							
	Yes	\sim								
		Number of employees	TERMS OF PAYMENT							
		50	Currency							
			ZAR 🗸							
			Terms of payment							
			30 Days	~						
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						Back	N	ext	Cancel	

- Click on Add category to select the companies procurement catogories
- Click **OK**
- Then click Next

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Vendor registration						
Procurement categories						
Select procurement categories for the products or services that your company requests to provide						
+ Add category V 🔞 Remove						
Procurement categories						
₽ Filter						
Catering.Events and Meetings						
Chemical, Gas and Laboratory Consumables						
Consulting and Professional Fees						
Legal Expenses						
Professional Services - Consultancy and Contractors						
Recruitment Expenses Cruitier and Freinht Services						
OK Cancel						
		[Back	Nex	t Ca	ncel

• The vendor can now click **Finish** to finalize the registration.

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Vendor registration							
Submit registration							
When you have submitted your registration, you cannot modify the information. Click Finish to submit.							
		[Back	Fir	nish	Cancel	

• Registration confirmation page

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Vendor registration							
Your registration has been submitted and you can close the page.							

Once the NMISA internal approval process is complete. The view will be similar to the below. This will allow the Vendor to have information to:

- Invoicing
- Purchase orders confirmation
- Request for quotation

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1.2 VENDOR BIDDING

To view RFQs, the Vendor will click on Vendor bidding

- This will show New bid invitations, Returened bid, Bids in progress, Awarded bids and Lost bids
- Click on the Request for quotation number

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Ħ	1 0	New bid invitations	P Filter								
		-	Request for qu Document title	Reply progress	Solicitation type	Bid type	Requested delivery date	Expiration date and	time 🖓		
	New bid invitations	Returned bids	FRQ000000056 Test Vendor collab - RFQ	Not started	Normal	Open	5/18/2020	6/17/2020 12:00:	00 AM		
	0	Bids in progress									
	Returned bids	Submitted bids									
	0										
	Bids in progress										
	O O Awarded bids Lost bids										

• Click on **Bid**

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Bid Decline RFQ attachments Bid att	tachments Options P					(00
Page options Share Change view ∨ Get a link ∨							
Request for quotation bid FRQ0 Test Vendor collab - General						Bid progress Not started	~
Request for quotation FRQ0000000	Requestor Raja Faisal Masood	Address Meiring Naudé Road, Brummeria,	Bid type Open	Bid submitter	Vendor name Training Test Co		
	Document title Requesting department Test Vendor collab - RFQ	Pretoria ZAF	Requested delivery date	Submission date and time	Prices include VAT		
		ZAF	5/18/2020		No		

- Enter bid amount
- Click Save
- Click Submit

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		Amend	ments											- ~	
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		Lines													
		Reset from RFQ. Add alternate: Remove alternate: RFQ line attachments. Bid line attachments.													
		\checkmark	Line number	Line type	Procuremen	nt category	Product name	Product number	Item number	Quantity Unit	Unit price	Net amount C	omment		
			1	Item			VICAM fluted filter paper (24c) (056	056	2.00 ea 🗸 🗸	300.0¢	600.00			

• Confirmation of bid sent

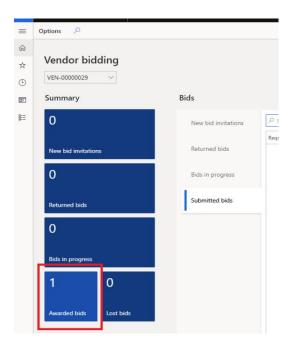
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OF.	(i) Ope	eration completed	
0		Request for quotation bid FRQ000000056 : TRAINING TEST CO	You have successfully submitted your bid.
	=	Test Vendor collab - RFQ	Do not tell me again
		Amendments	
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		Delivery and payment terms	

The Bid will now appear under Submitted bids

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	0	Bids in progress								
	Returned bids	Submitted bids								

After a quotation is accepted by NMISA it will show under Awarded bids.

• Click on **Awarded bids** to view the bids.



• Click on the Request for quotation number to go into the detail.

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	Awarded bids P Filter	
	✓ Request for ↑ Repuest for quotation case Requesting department Document title Solicitation type Bid type Requested delivery date Expiration date and time V Vendor	or accou
	FR0000000056 Submitted by vendor RFQC-0000203 Test Vendor collab - RFQ Normal Open 5/18/2020 6/17/2020 12:00:00 AM VEN-0	00000

• Awarded bids detail page.

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RFQ at	ttachments Bid attachments Options	م							000
=	Awarded bids Test Vendor collab - RF	Q						Bid progr Submitt	ess ted by vendor
	Regunst for quotation FR0000000 Document tills Test Vendor collab - RFQ Status Accepted: No action required Reguest for quotation case RFQC-00000	Repustor Raja Faisal Masood Repusting department Delivery name National Metrology Institute of Delivery address National Metrology Institute of	Address Merining Naudié Road, Brummeria Pretoria ZAF Solicitation type Normal	Bid type Open Requested delivery date 5/18/2020 Expiration date and time 6/17/2020 12:00:00 AM Currency ZAR		Bid submitter John Black Submission date and time 5/18/2020 05:11 PM Allow alternates on response lines Wendor account VEN-00000029	Vendor name Training Test Co Prices include VAT No Document No		
	RFQ description Bidding guidance items								~
	Amendments								- ~
	Questionnaire								- ~
	Delivery and payment terms								30 Days 🗸 🗸
	Lines								
	RFQ line attachments Bid line attach	hments							
	✓ Line number Line type	Procurement category	Product name	Product number	Item number	Quantity Unit	Unit price	Net amount Commer	ıt

1.3 PURCHASE ORDER CONFIRMATION

After a purchase order is confirmed by NMISA it will show under **Open confirmed purchase orders**.

- Click on **Open confirmed purchase orders** to view the confirmed orders.
- Click on Show

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\$	Purchase order confirmat	ion			
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			V Purchase order	Confirmation date and time ↓	All confirmed purchase orders
	Purchase orders for review	Awaiting customer action	PO-000000140	5/19/2020 10:11:10 AM	
	0	Open confirmed purchase orders			
	Awaiting customer action				
	O Open confirmed purchase orders				

• To preview or print the purchase order click on Preview/Print

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= Previ	lan/Print ∨ Charges History Notes a	nd attachments Options	P											
ŵ	P Filter	All confirmed purchas	se orders											
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н —	PO-000000140	Vendor account	Purchase order	Mode of delivery	Total discount %	30 Days	Address							
0	Open order	VEN-00000029	PO-00000140		0.00	Currency	Meiring Naudé Road, B	irummeria,						
	VEN-00000029	Invoice account	Purchase order status	Delivery terms		ZAR	Pretoria ZAF							
E		VEN-00000029	Open order		PAYMENT		24-							
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• Preview/Print page

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	MeiringNaudéRoad	Institute of South Africa Brummeria,		Training Test C 36 Jean ave	0							
	Pretoria ZAF			Centurion Pretoria								
	Phone: + (2 Fax:	7) 12 841 4152		0001 ZAF								
	Reference	De	scription		Ve	ndor Nr.	Exp Arrival Date					
					VEN	00000029	18/05/2020					
							Net Amount	7				
	Item number	Description		Qty. Ord	Unit	Unit Cost	ZAR					
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1.4 INVOICING

• The vendor will click on **Invoicing.**

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E	< May 2020	> 🗊 Invoicing	R Vendor bidding
	Su Mo Tu We Th Fr	Sa Sa	
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	3 4 5 6 7 8	9 Purchase order confirmation	RE Vendor information
	10 11 12 13 14 15	16	
	17 18 19 20 21 22	23	
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- Click on New
- Enter Purchase Order
- Enter Invoice number

- Enter Invoice date
- Click on Create invoice

	Finance and Op	perations			?
≡	+New Options	, , Р			New invoice from purchase order
ெ	Invoicing				Purchase order PD-000000140
☆	VEN-0000029	\sim			Invoice number
•	Summary		Vendor invoices		Invoice date
0	0	0	Draft	P Filter	Invoice description Test - Invoice
	Draft	Submitted, not approved	Submitted, not approved	✓ Number ↑ Purchase order	
	0	0	Find invoice	We didn't find	
	Approved, not paid	Paid			
				See more	
	4				Create invoice Cancel

NMISA will receive the invoice for review. Once reviewed the invoice on the;

- Click on **Save** to save the invoice.
- Click on Workflow.
- Click on Submit.

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		Vendor inv	oice heade	r								1234	ZAR 6/1	8/2020 ^		Related information
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		Number		ZAR		Workflow status			Con	Computer software and hard ∨						ation
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		Invoice descrip			No DATES Invoice date 5/19/2020		VENDOR Name Training Test Co Invoice account VEN-00000029			36 Jean ave Centurion Pretoria 0001 ZAF						
		Test - Invoid	ce													
		Purchase orde	r	DATES												
		PO-000000	140													
				5/19/												
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	6/18/2020															
	Lines															
Remove Financials Notes and attachments								-11								
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		056		VICAM fluted filte	er paper (24c) (2	00 300.0	600.00						

- Enter comment.
- Click on Submit.

 C Edit	nce and Operations	orkflow ∽ VAT Charges Notes and att	achments Options 🔎			? Supplier invoice workflow - Submit Comment Invoice submitted
=	Vendor Invoice PO-000001 12345678 Vendor Invoice header INVOICE IDENTIFICATION Number	40 : TRAINING TEST CO Currency ZAR	DATES Invoice date		APPROVAL Workflow status	[]
	12345678 Invoice description Test - Invoice Purchase order PO-000000140	Has notes and attachments	5/19/2020 Due date 6/18/2020		Draft VENDOR Name Training Test Co	
	Lines Remove Financials > (Intermode the second s		sent category	Quantity 2.00	Unit price Line net amount 300.00 600.00	Submit

- The invoice will now appear under **Submitted**, not approved.
- Click on the invoice **Number** to get the detail.

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• Submitted invoice, not approved page.

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		Lines						
		I Remove Financials ~	Notes and attachments					
		V Item number 056	Item name VICAM fluted filter paper (24c) (Procurement category	Quantity 2.00	Unit price Line net amount VAT group 300.00 600.00	item VAT group	Has notes and

- After approval, the invoice workflow status will change to approved.
- After payment it will change to Paid

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