GFT Synertrade: Supplier Guide

How to: modify your profile – answer a QRFP – confirm an order – register an invoice

Index

Introduction

Access the Portal

GFT – Synertrade Supplier Guide Introduction

This guide will show you how to access the GFT Synertrade supplier portal and go through the features and functionality.

- **What is the Syntertrade Supplier portal?**
  - The supplier portal allows you to go to a website, see a list of all your purchase orders from GFT and submit invoices for those Purchase orders.
  - You will also be able to update your company information, add your colleagues for access and take part in 'Quick RFPs'
  - You will receive an email with your login details and password.
  - Invoices submitted via the supplier portal will be processed electronically through the portal and you will have visibility of your invoice status as it moves through our approval process.
  - All invoices submitted via portal will also show the payment data once GFT pays the invoice. Both of these things will give you more visibility of your invoice and help ensure you are paid in a timely manner based on your payment terms with GFT

Access Synertrade Supplier Portal (1)

- Access the platform via your browser through: https://gft.synertrade.com
- You will reach the Access page of the Portal

GFT ■

WELCOME, please enter your credentials

👤 Login

🔑 Password

☐ Show password
☑ Keep me signed

SIGN IN

Forgot Password or Login?   QA

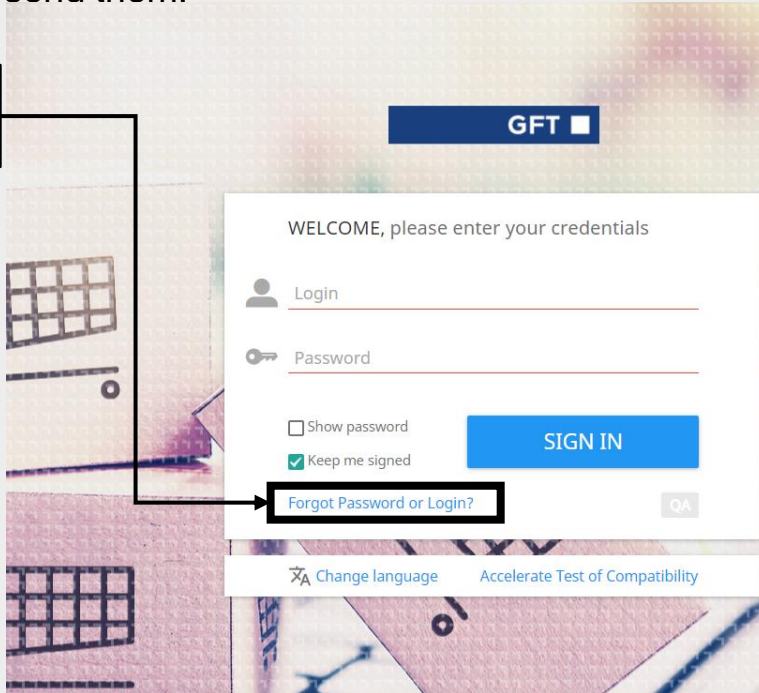🗛 Change language   Accelerate Test of Compatibility

1. Enter the:
 - Login
 - Password
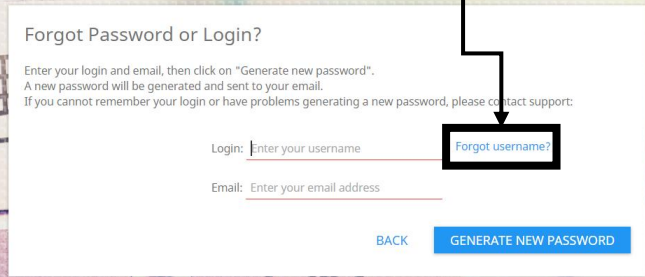That you have received by email

2. Click on button "Sign In" to enter

Access Synertrade Supplier Portal (2)

- When you do not have your credentials or if you have forgotten them, the portal can re-send them:

1. Click on "Forgot Password or Login"?

4. If you don't remember your login, click on "Forgot username?"

2. You will be re-directed to this page. Enter your login and email address
3. Click on button "Generate New Password"

Access Synertrade Supplier Portal (3)

- When you do not have your credentials, the portal can re-send them:

You will receive an email with a new password. Copy it without spaces and go back to the Access page.
Enter your login and received password.

Once you have entered the received password, you will be asked to set a new password.
You will need to:
- Repeat your new chosen password twice
- Respect the characters restrictions that show in the box to the right

NEW PASSWORD GENERATED

Dear Anais Delgado,

A new password has been generated. Please enter this new temporary password together with your login:

https://

Password: aLLBn7tR%s

After first log-in, please follow the 2 steps:
1. You will be required to enter a new personal password (please ensure you follow the password rules set).
2. Once logged in, click on your user name link in top right corner; check and save your personal settings for your profile (language, time zone etc.).

In case of questions regarding the platform usage please contact support +33 (0)975184485 or email support@synertrade.com.

This is an automated generated message; please do not reply to this email.

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Change password

Enter a new password:

Enter new password: 👁   ● Length: min. **8** - max.**10**
                                              ● Number of numeric characters: min. **1** - max.**5**
                                              ● Number of special characters: min. **1** - max.**5**
Re-enter new password: 👁   ● Number of capital letters: min. **1**
                                              ● Password not matching

CANCEL   SAVE

Change your Language

- Once you have accessed the Portal, you will reach the "Synerspace"
- The language in which you navigate in the application can be changed here

1. Hover on your name with the pointer
2. A menu appears, click on the "Language" option

2. The languages options box appears, select your language
3. Click on "Apply" to save your language

My Account

Review your company information

Review your Profile – Contact Information

- Check that GFT has your right contact information
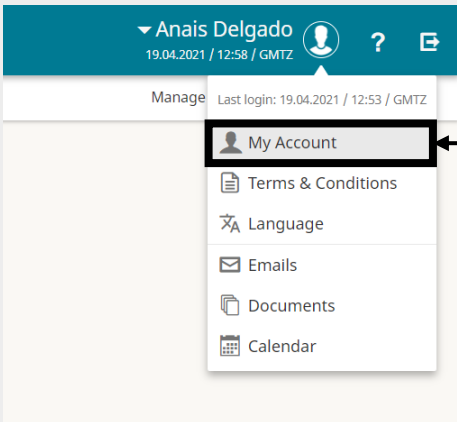
1. Hover on your name with the pointer
2. A menu appears, click on the "My Account" option

Anais Delgado
19.04.2021 / 12:58 / GMTZ

Last login: 19.04.2021 / 12:53 / GMTZ

- My Account
- Terms & Conditions
- Language
- Emails
- Documents
- Calendar

Contact information

CONTACT INFORMATION | PROFILE | PERSONAL SETTINGS | CERTIFICATES | MATERIAL GROUPS | DOCUMENTS | COMPANY CONTACTS | COMPANY BANK ACCOUNTS

Save | Cancel

**CONTACT INFORMATION** | **ADDRESS**

Contact type: Commercial contact / Invoicing contact
Company: SYNERTRADE IBERIA, SL

First name: Anais
Last name: Delgado
Login: anais.delgado

Password: ****************
Country: Spain

User enabled: ☑

SIGNATURE | **CONTACT DATA**

Email address: anais.perez@synertrade.com
Phone: 0123456

HISTORY

415 QA

When you reach your contact information.
You can review & update your:
- Contact type – these are the areas where GFT might contact you
- Your country
- Your phone number

After making your changes, do not forget to click on "Save"

Review your Profile – Company Profile (1)

- Review your company information: address and contact

Go to the "Profile" tab to see your company information

In this tab you should check that the following information is correct:
- The legal address
- The general contact information (phones, fax, email address)

gft.com

16/07/2021

Review your Profile – Company Profile (2)

- Review your company information: Tax Code

When you scroll down check:

- Regional Tax Code: this is the tax code assigned to your company
- VAT number: only complete if your company has a European Union VAT number – this should not contain the country code

NOTE: the rest of the information is non-editable completed by GFT and you will need to contact them to amend if incorrect

Business type	Reseller
Valid from	
Valid to	
Currency	EUR - Euro
Incoterms	Free on Board 2010
Payment terms	Within 30 days Due net

Regional tax code B88093877

Local ERP No. 1009834

VAT Number B88093877

Witholding tax GN - (-15%) - Ret. IRPF profesi

VAT Type	No tax
Comment	

HISTORY

Review your Profile – Define your preferences

- Define your preferences to see the timezone and dates in your preferred format.

Go to the "Personal Settings" tab to review your preferences

Review your:
- TimeZone
- Date format
- Numeric format
- Currency in which you work

Review your Profile – Upload your certificates

▪ Add or update your certificates to increase your chances to work with GFT

Go to the "Certificates" tab to view or add certificates

CERTIFICATES · MATERIAL GROUPS · DOCUMENTS · COMPANY CONTACTS · COMPANY BANK ACCOUNTS

Personal Settings / Supplier name SYNERTRADE IBERIA, SL   Contact

CONTACT INFORMATION · PROFILE · PERSONAL SETTINGS · **CERTIFICATES** · MATE

1. Click on button "New" to add a certificate

NEW   Configure

NO.	☐ ▾	↔	CERTIFICATE CODE ▲	CERTIFICATE NAME ↕	ALT
1	☐	⋮	DIN ISO 9001:2018	DIN ISO 9001:2018	

Select Certificate   others

Alternative name

Status   ● Enabled

Valid from

Valid until

Certificate To Be Returned Before

Certificate Documents   Upload additional documents (e.g. scanned certificate).

Certification authority

Remind me prior to certificate expiration (x days before expiration) ☑ 90

Remind me as certificate expires. ☑

Language for email   English (UK)

Another page opens, here fill the details of your certificate:
- **Select certificate**: select from the list the certificate you will upload. If it is not listed, select "others"
- **Alternative name**: write your certificate name if it is not listed
- **Valid from / Valid to**: select the dates of validity of this certificate
- **Certificate Documents**: click on this icon to upload the certificate

Review your Profile – Upload your certificates

▪ Add or update your certificates to increase your chances to work with GFT

Go to the "Certificates" tab to view or add certificates

CERTIFICATES | MATERIAL GROUPS | DOCUMENTS | COMPANY CONTACTS | COMPANY BANK ACCOUNTS

GFT

Personal Settings / Supplier name SYNERTRADE IBERIA, SL | Contact

CONTACT INFORMATION | PROFILE | PERSONAL SETTINGS | CERTIFICATES | MATE

1. Click on button "New" to add a certificate

Search

NEW | Configure

NO.	☐▾	↔	CERTIFICATE CODE ▲	CERTIFICATE NAME ⇕	ALT
1	☐	⋮	DIN ISO 9001:2018	DIN ISO 9001:2018	

Select Certificate: others

Alternative name:

Status: ● Enabled

Valid from:

Valid until:

Certificate To Be Returned Before

Certificate Documents: 📑 Upload additional documents (e.g. scanned certificate).

Another page opens, here fill the details of your certificate:
- **Select certificate**: select from the list the certificate you will upload. If it is not listed, select "others"
- **Alternative name**: write your certificate name if it is not listed
- **Valid from / Valid to**: select the dates of validity of this certificate
- **Certificate Documents**: click on this icon to upload the certificate

Do not forget to click on "**Save**" to keep your changes

Certification authority

Remind me prior to certificate expiration (x days before expiration) ☑ 90

Remind me as certificate expires. ☑

Language for email: English (UK)

> gft.com

16/07/2021

15

Review your Profile – Upload or view other documents

▪ If you want to share other documents (non-certificates) with GFT you can upload these.

Go to the "Documents" tab to view or add documents
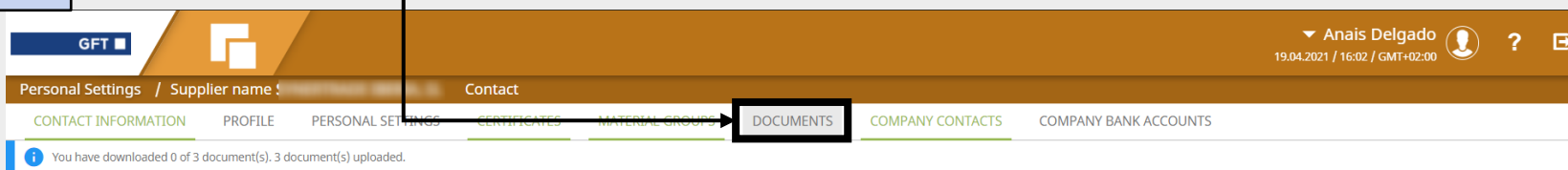
1. Click on button "Upload" to add a document
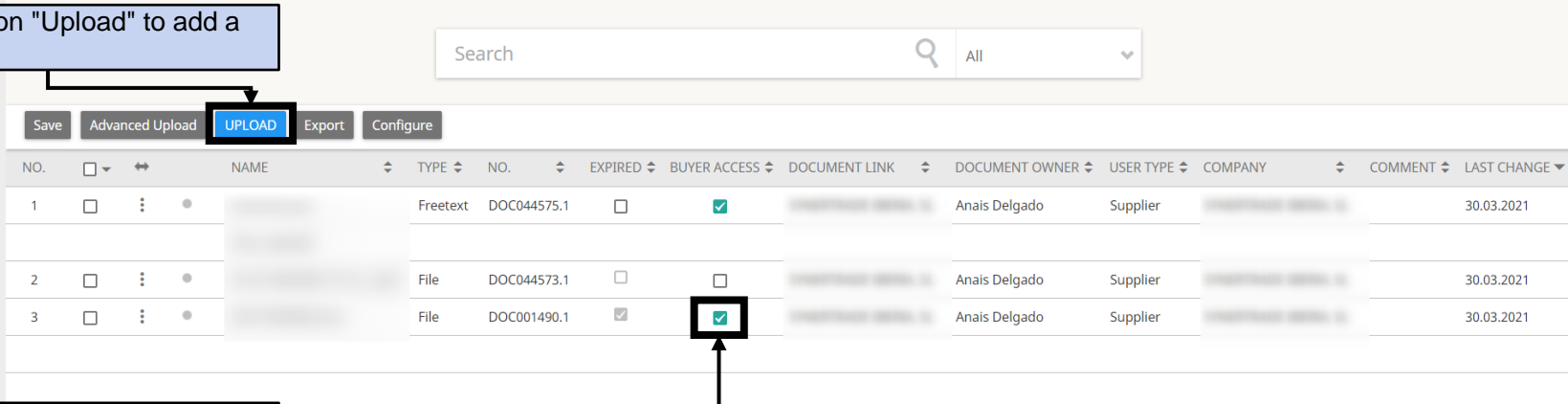
2. Mark the "Buyer Access" to share this document with GFT

Review your Profile – View your registered colleagues

- See if some of your colleagues are also registered in the portal

Go to the "Company Contacts" tab to view who is registered in the portal

Contact GFT support if you need a colleague to be added to the portal

Review your Profile – Add your company bank account (1)

- Register or update your Company Bank Account information
- All bank account changes will be checked and verified by GFT Finance team

Go to the "Company Bank Accounts" tab
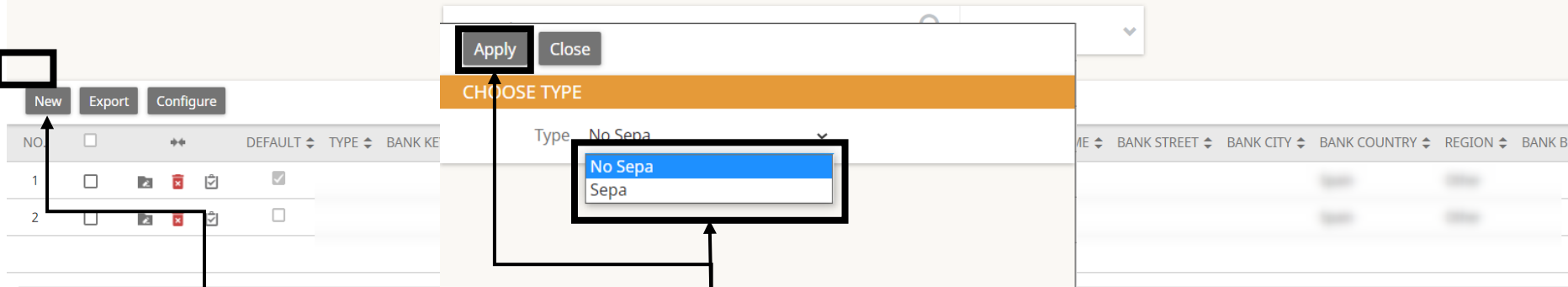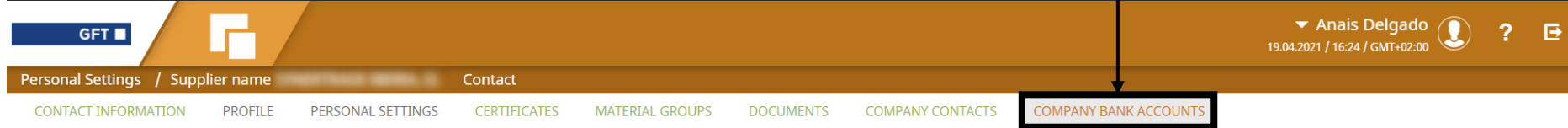
1. Click on "New"

2. Select if you are adding a Sepa or No Sepa Bank Account
3. Click "Apply"

Review your Profile – Add your company bank account (2)

- Register or update your Company Bank Account information

Stay in the "Company Bank Accounts" tab

1. Fill the Company Bank Account Information – in the Attachment, add the bank account certificate
2. Click on "Save"

Personal Settings / Supplier name   Contact

CONTACT INFORMATION   PROFILE   PERSONAL SETTINGS   CERTIFICATES   MATERIAL GROUPS   DOCUMENTS   COMPANY CONTACTS   COMPANY BANK ACCOUNTS

COPY OF COMPANY BANK ACCOUNT DETAILS (NON SEPA)

Save   Back to Overview

Bank key

Bank SWIFT code

Bank account number

IBAN

Payment currency

Bank name

Bank street

Bank city

Bank country   Spain

Region   Other

Bank branch

Bank account holder

Attachment File

Quick Request for Proposal

Answer to a Request for Proposal

Invitation of a Request for Proposal

- A quick RFP (Request for Price) is a feature in Synertrade that allows GFT to request a price for a product or service from selected suppliers. If selected for a quick RFP, you will receive an email with details of the RFP and how to respond.

QUICK RFP INVITATION

Dear VS VEREINI .,

You are invited to participate to the following Quick RFP: **RFP0000124** : **DE06_TC9.02** by Rica Scherzinger (rica.scherzinger@gft.com)

The deadline for the Quick RFP event has been set to: 02.07.2021 15:55

Please check the QRFP here **CLICK HERE**
This is an automatically generated email. Please do not respond to it.

The email gives you:
- The contact of the person inviting you
- The deadline you have to answer
- A link to Access the Request for Proposal – click on it

Access the Request for Proposal

▪ Once you clicked on the email link you will be redirected to the Request

1. Read the NDA / Terms and Conditions
2. Either Accept or Reject these (note that access is only granted if these are accepted)

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Answer to the RFP

▪ Add your price, documentation and comments

1. Read the description of the Request for Proposal and click on the contact name if you have questions regarding the Request

2. Check if the Buyer has left documents you need to review on the "Received documents"
3. Click on "Add/View" to download the documents added by the buyer or upload your offer relevant documents

GFT ■   ≡🖩 Quick RFP

19.04.2021 / 16:56 / GMT+02:00

Quick RFP / Supplier Quotation / Project **IT hardware 2022**   Project ID **RFP0000065**   Project status **Online**   User role **Supplier**

REQUEST DETAILS
Name: IT hardware 2022
Description: computer, mouse, keyboard
End Date: **29.04.2021**
Contact:

6. Enter any relevant comment to your offer

YOUR QUOTATION SUMMARY
ID:
Total: **EUR 0,00**
Date:
Comment:

ADD COMMENT

DOCUMENTS
Your documents: **0**
Received documents: **1**

ADD/VIEW

Back to overview   Configure

☑ ▾	ID	⤢	NAME	DESCRIPTION	UNIT	TOTAL	QUANTITY	YOUR OFFER
☑	010	🗀	Laptops 17'		Each		30,0000	

You have selected 1 record(s)

4. Enter your Unit Price

5. Save

Reject   Save   SUBMIT OFFER

7. Once your offer is ready, send it to the buyer clicking on "Submit Offer"

Change your offer

- While the Request for Proposal has not reached its deadline, you can modify and send again your quotation

3. Enter any relevant comment to your offer

1. Enter your Unit Price

2. Save

4. Once your offer is ready, send it to the buyer clicking on "Submit Offer"

Reject Participation

▪ If you are not going to quote for this Request of Proposal you can reject it.

1. Click on "Reject button"

Winning a Quick RFP

- If you are successful in your bid, it will be accepted by GFT and you will receive an email with details confirming your bid. You will then be contacted by a Procurement manager.

!!!QUICK RFP AWARDED

!!!Quick RFP ID: **RFP0000116**

Quick RFP Name: **QRFP PL01_TC09**

Dear Ms/Mr MDD SP. Z . ,

The project (or parts of it) has been awarded to you. The respective procurement manager will contact you soon.

Congratulations, your offer has been awarded

This is an automatically generated email. Please do not respond to it.

Orders

Review of received orders

Order received

▪ You will receive an email when an order has been placed

The email shows:
- The Order Number to which the invoice should be referred to
- The delivery address
- The invoice adddress
- The list of positions / number of PO lines
- An attachment with the order details in .pdf and/or .xml format

Order received
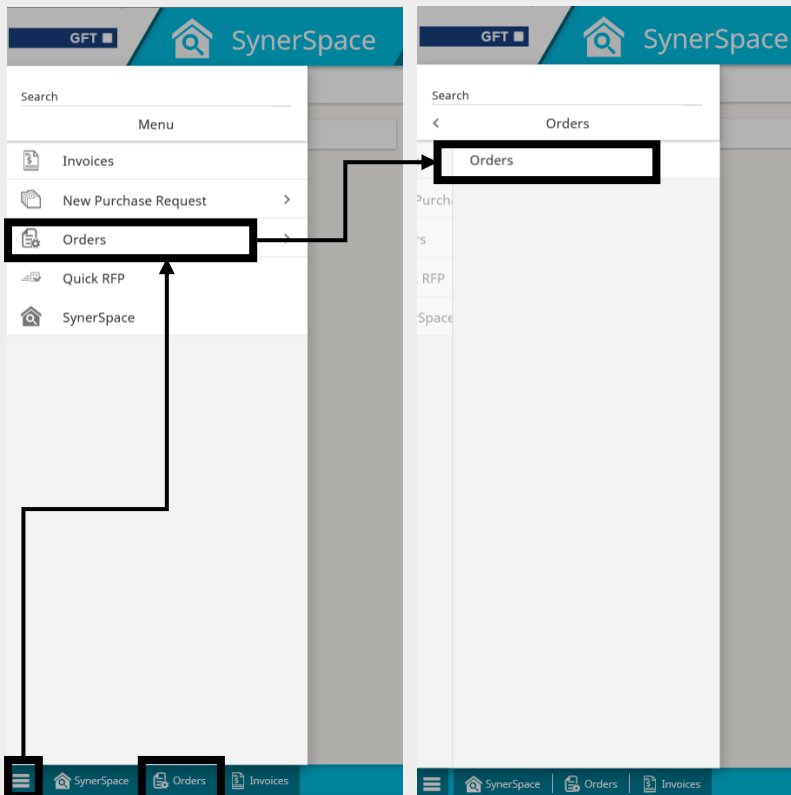
- Received orders can be reviewed in the portal from the main menu by selecting Orders or access via quick access on the bottom of the screen.

Order received

- Open Orders tab shows the Orders that have not been fully booked
- On each PO, the actions menu is accessible by the 3-dots icon
- Clicking on any part of the PO, their positions are shown

The actions menu allows:
- To **Open** and download the order in pdf format
- To review the attached **Documents**
- To **Confirm** the order
- **Open positions to view the PO Lines**

Order received

- Documents attached to the PO can be reviewed in Documents tab
- From Open positions, more detailed information of the Order positions is shown

Order received

- Closed Orders tab shows the Orders that have been totally fulfilled, cancelled or closed
- On each PO, the actions menu is accessible by the 3-dots icon
- Clicking on any part of the PO, their positions are shown

Invoices

Registration of an invoice

Access to Invoicing

- Orders and Delivery Notes to be billed as well as already submitted billing request (invoices) can be reviewed in the platform from Invoices module
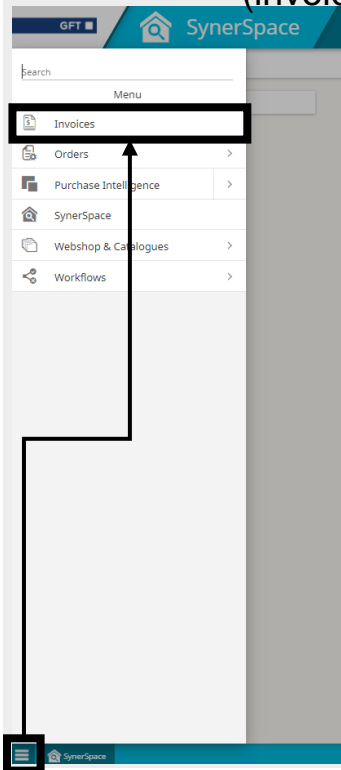
- In invoices module from the menu on the top the relevant options are shown

Invoice menu options

Delivery/Return notes to be billed   List of delivery/return notes to be invoiced

Orders to be billed   List of orders to be invoiced

Submitted billing request   List of invoices submitted

Delivery/Return notes to be billed

- This windows shows all the delivery and return notes that have not been billed yet
- Multiple selection is possible, as long as the same legal entity is respected
- Selected notes can also be exported to an Excel sheet to be completed and imported

Billing request without reference will be only allowed for Non-PO suppliers

Orders to be billed

- This windows shows all the orders that have not been billed/invoiced yet
- Multiple selection is possible, as long as the same legal entity is respected
- Selected orders can also be exported to an Excel sheet to be completed and imported

Billing Request creation

- When creating the billing request, if references were assigned, the related info will be retrieved from the order/delivery note

- From partial billing request, the correct delivery notes to be linked can be selected

Document date and number are mandatory fields

Billing document can be attached

New positions can be added as well as delete existing ones.

Quantities and Unit Prices can be adjusted

Billing Request creation

- For referenced billing requests, in Partial billing request option, the correct delivery notes to be linked to the billing request can be selected

- The order can also be marked as partially/completely billed/invoiced

Submitted billing requests

▪ This window shows all the billing requests that have been submitted and their status

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