



# User Manual

December 2023

v1.0



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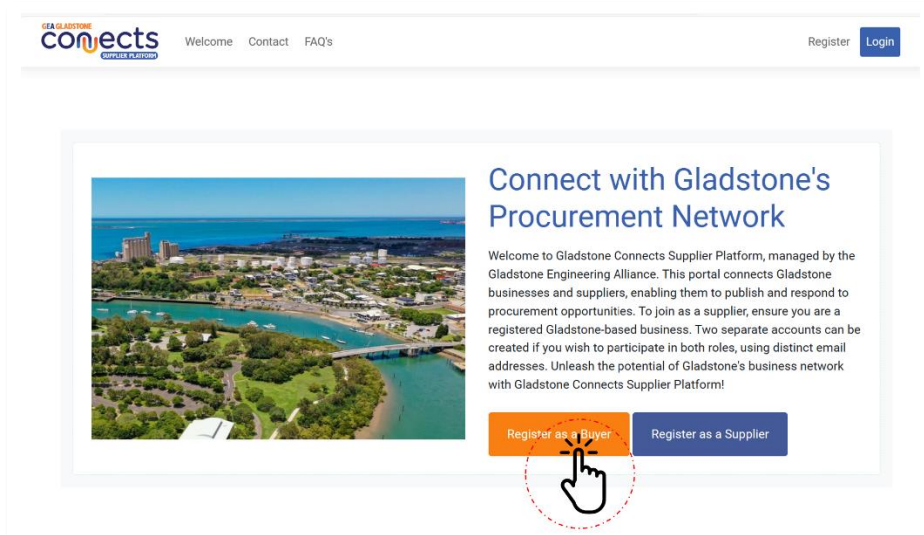
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## 2. Buyer Functionalities

### 2.1. Registration

New organisations looking to register in the platform as a **buyer** will need to follow a series of steps to become active in the system, as follows:

- i. Click on “Register as a Buyer” button in the Home Page:



- ii. Follow the instructions in the screen and fill in every mandatory field identified with an asterisk (\*).

Note that the person registering on behalf of an organisation will be responsible for completing and maintaining the organisation profile in the system.

Also, this person will be able to create multiple subaccounts for the same business which will be able to work in purchase requests and the interaction with potential suppliers.

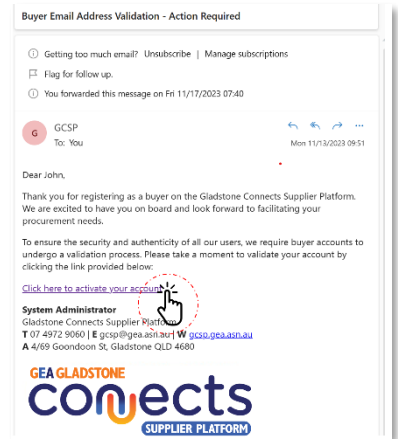
Submit the form and wait for an email to validate your account.

- iii. Check your email and find an email from us with the subject “Buyer Email Address Validation – Action Required”.

Click in the link provided to activate your account.

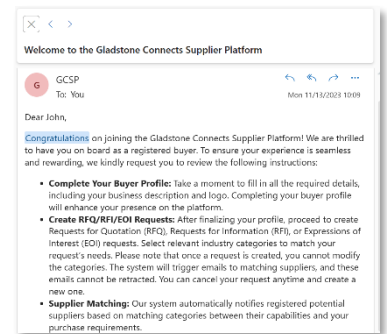
This will trigger a request for the Gladstone Engineering Alliance to review your request. Allow for a day or two for your request to be processed.

If you would like to follow up on the status of your registration request, please contact the GEA team.



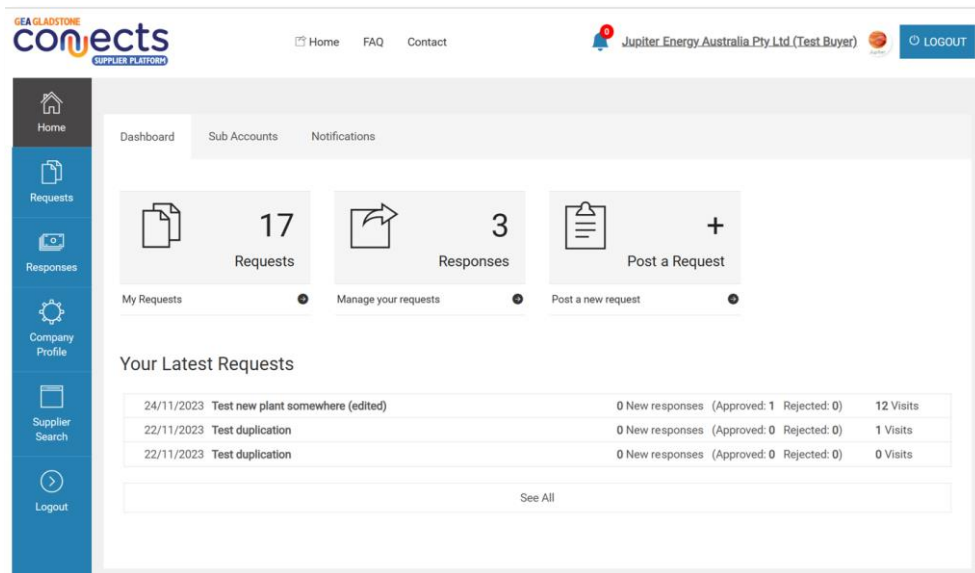
- iv. Once the GEA has reviewed your application, you will receive another email welcoming you to the platform with instructions of the different functions that you can perform as a buyer in the system.

From this moment onwards, you are fully onboard and can commence utilising the platform.



## 2.2. Dashboard and menu options navigation

After logging into the system with the email address you used to register and your password, you will be directed to your Dashboard which will summarise your organisation’s activity and from where you will be able to access the main system functions.



- i. In the page’s top section, you will find the links to the Home page, Frequently Asked Questions and Contact details. In the top right corner, you will also see an icon indicating the number of relevant alerts and notifications, the name of your organisation, your logo, and Logout button to close your session.
- ii. In the left section, you will also have the possibility to access the main system functions such as:
  - a. Management of new and existing requests

- b. Management of responses to existing requests
- c. Management of your company profile
- d. Supplier search engine

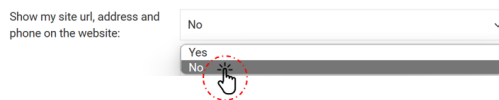
### 2.3. Manage your Buyer Company Profile

Building a comprehensive buyer profile will enhance your presence on the platform, attracting more relevant suppliers and promoting transparency and visibility of the present and vision of the organisation in the Gladstone Region.

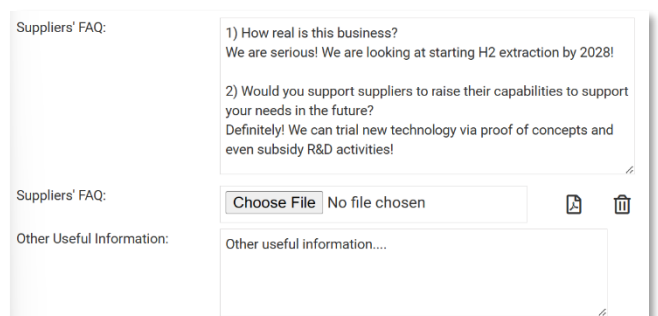
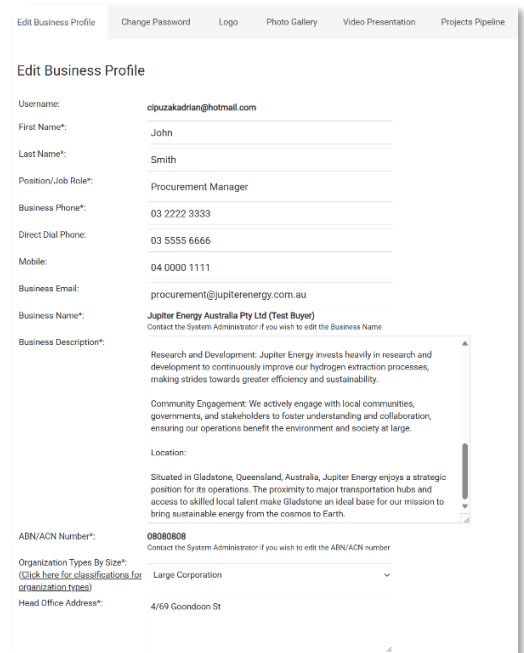
Take your time to populate the information required in a way that highlights your business strengths, commitment to local buy and other values, share your project pipeline and encourage local suppliers to connect and respond to your organisation’s future purchase requests.

- i. In the top section of the page, you will be able to select which piece of information you want to modify business profile, password, logo, photo gallery, video presentation and projects pipeline.
- ii. By clicking on **Edit Business Profile**, you can modify:

- Your personal and business contact information (first and last name, position/role, business phone, direct dial phone, mobile phone).
  - ▲ **IMPORTANT:** Please note that the information you provide here will be visible and public by default. You can change this setting by selecting the option to show these contact details down the form.



- Your business data such as name and its description, ABN, organisation size, addresses, website, and social networks URLs, etc. You will also be able to select the checkboxes that describe if the business is Women owned, indigenous owned or non-for-profit.
- You can optionally include those FAQ by suppliers, either as a simple series of Q&A in the form field provided or by uploading a PDF document containing that information.
- To give you flexibility, it is also possible to enter any Other Useful Information you would like to share with others in your company profile.

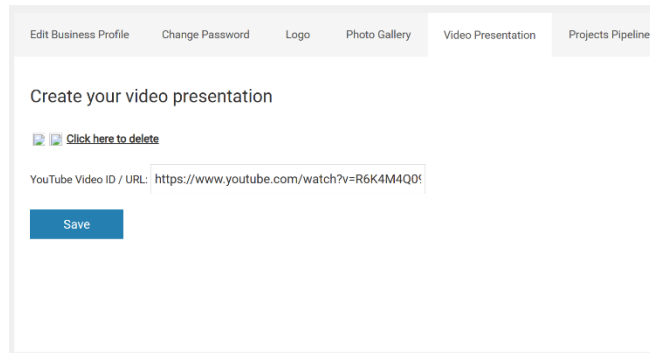


- iii. By clicking on **Change Password**, you can modify your current login details:

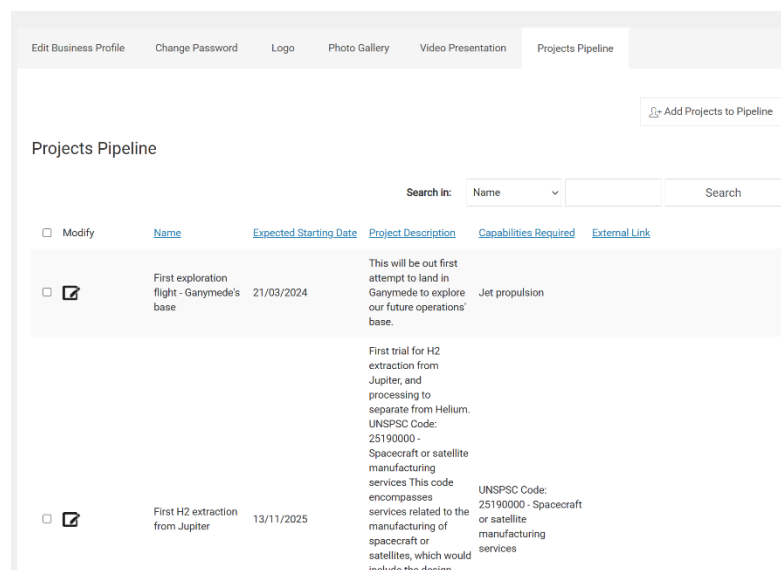
iv. By clicking on **Logo**, you can upload and change your company’s logo:

v. By clicking on **Photo Gallery**, you can upload photos that depict your organisation and its activities:

vi. By clicking on **Video Presentation**, you can include a link to a YouTube video that describe your organisation and/or projects:



- i. By clicking on **Projects Pipeline**, you can add multiply projects in your organisation’s pipeline that you would like to provide visibility of, to potential suppliers. Each project has a name, ETA, Description, Capabilities that will require from suppliers and a link to an external website providing more details of each:




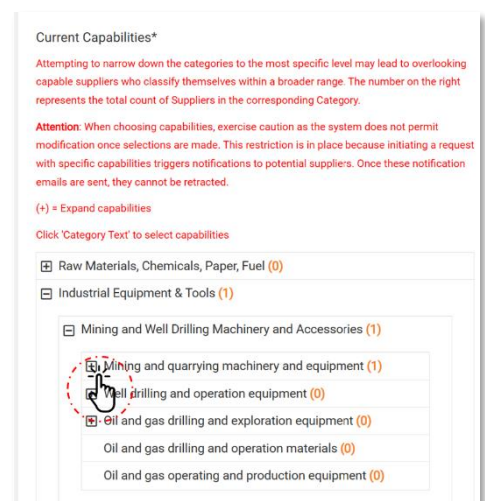
## 2.4. Request management – Post a new Request.

The system allows the creation and management of three type of purchase requests:

- Requests for Quotation (RFQ)
- Requests for Information (RFI)
- Expressions of Interest (EOI)

By selecting relevant industry categories to match your request’s needs, the system will automatically match and notify potential suppliers with matching capabilities to your request.

- i. Select the Type of request, the Title, and the capabilities that this request requires the suppliers to currently have. Click on the  icon to expand the categories and access the subcategories that best represent the products or services required. Note that next to each category, you can see in brackets the number of suppliers with that capability.



**⚠ IMPORTANT:** When choosing capabilities, exercise caution as the system does not permit modification once the request has been created. This restriction is in place because initiating a request with specific capabilities triggers notifications to potential suppliers. Once these notification emails are sent, they cannot be retracted.

- ii. Select the Service Areas where you require the products or services to be delivered. Note that options are mutually exclusive, therefore make sure that you select all applicable boxes. For example, if you are looking for a supplier that can meet your needs in Gladstone and Rockhampton, select both Gladstone and the Central QLD options.

Describe the request in the Request Summary field to provide a brief overview of the and include as many attachments as you want with additional information that you consider descriptive of the Request.

You can also include a template that you want suppliers to use when responding to your requests, while you can indicate if you are open to receiving responses without the template being used or not. Be able to optionally show the budget available for the job.

- iii. Define the key dates for the new request:
  - Query cut-off date: last day where questions will be accepted from suppliers.
  - Expected completion date: ETA for the finalisation of the supplier responses' evaluation.
  - Closing date: deadline to accept responses for this request.

Optionally, include a link to a parent project that triggers this request (this can be an external link or a link to a request within our platform).

Finally, optionally add as many mandatory questions that you would like the supplier to respond to, in relation with the current request.

For each question, you can include multiple possible answers (one response per line) within the corresponding textbox. The system will make the supplier choose among those when responding to your request. Alternatively, you can leave the Possible Answers blank, which will then prompt the supplier to provide a free text answer when submitting a response to the request.

Click on "Add Another Question" to add more.

Finally, click on Submit to save the request and automatically notify any matching suppliers.

Preferred Supplier Service Areas\*

If you are open to receiving responses from providers who offer services throughout the entire Gladstone region, please ensure that all checkboxes are ticked.

Gladstone  
 Central QLD  
 Queensland  
 Australia  
 International

Request Summary\*  
(maximum 20000 characters)

Supplier Response Template  
(MS Word, Excel or PDF only. Maximum allowed size is 10MB)

No file chosen

Are you Open to Receiving Responses that do not use the Template?

Attachments to your Request

Name of document   No file chosen

[Add Another Attachment](#)

Show Maximum Budget

Supplier Query Cut-Off Date\*

Expected Completion Date for Supplier Identification and Evaluation

Closing Date\*

Link to Parent Project

Add Mandatory Questions

- Type your question in the "Question" field.
- If you want to provide a drop-down selection for the supplier to choose from, type the available selections in the "Possible Answers" field. Type one answer per line to make it appear as a selection drop-down.
- If you leave the "Possible Answers" field empty, it will display a text field for the supplier to type their answer.
- Please note that these questions will appear as mandatory fields on the supplier response screen.

Question 1  
  
 Possible Answers

[Add Another Question](#)



Question 2  
  
 Possible Answers

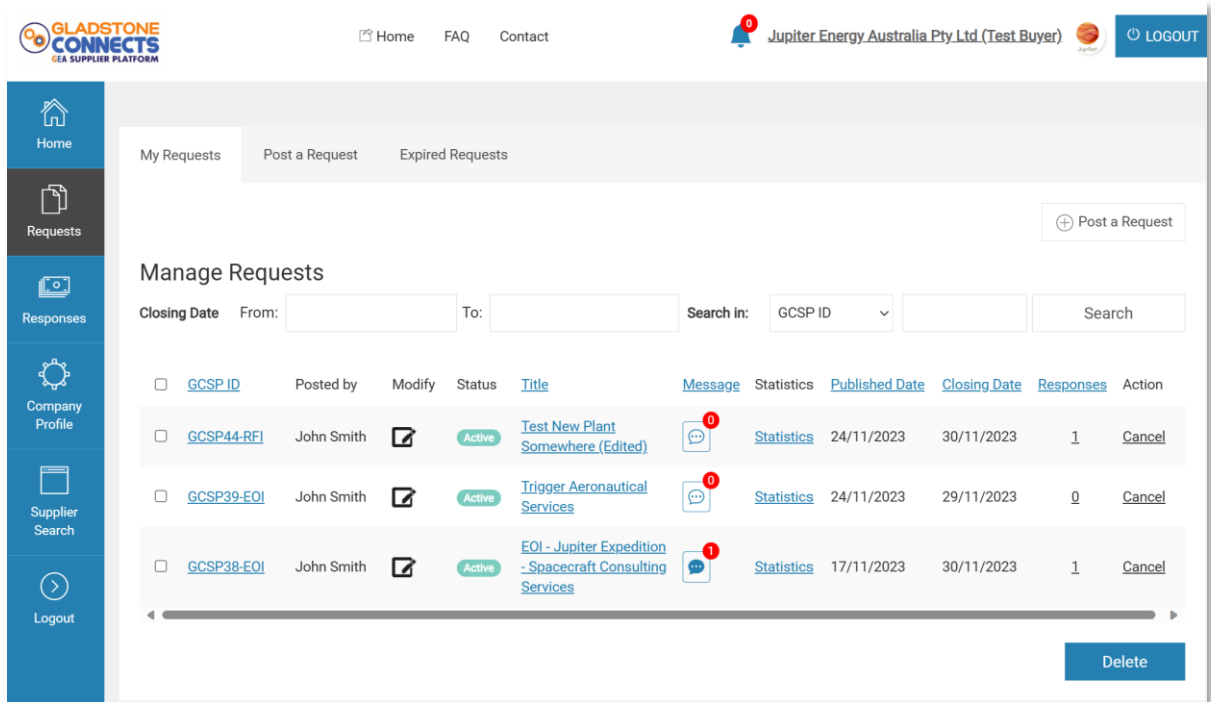
[Add Another Question](#)



## 2.5. Request management – Managing existing requests.

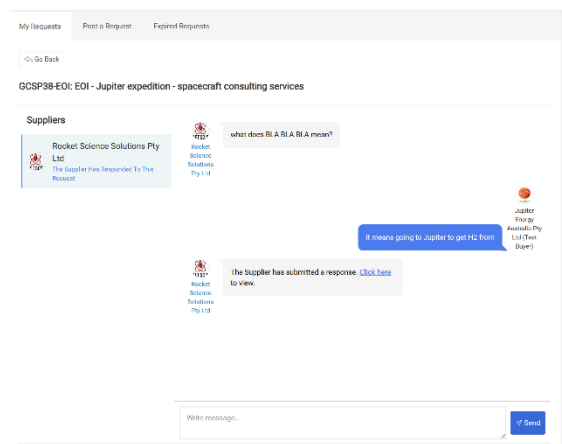
The system allows the buyer to manage previously created requests.

- i. When clicking on the main menu option **Requests**, the system will present a list of existing requests which are not yet expired. From this list, the buyer will be able to view the details by clicking on the Request ID or its Title, modify it by clicking on the  icon. By clicking on the  icon under the “Message” column, the buyer will be able to interact with suppliers via the Q&A messaging service. Finally, the Action column will allow to cancel the request should it become no longer valid.



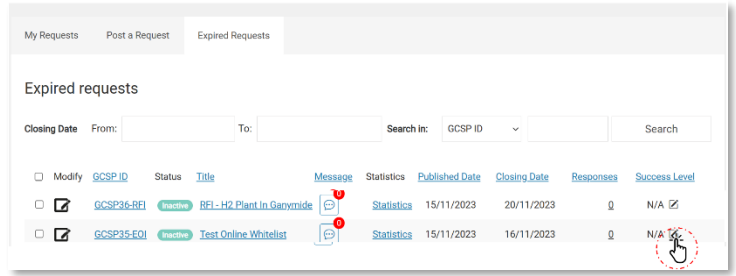
Note that you can order the results by clicking on any of the following columns: GCSP\_ID, Title, Message, Published Date, Closing Date and Responses.


- ii. By clicking on the Message icon associated to any request, the system will show on the left the name of the supplier that has submitting a query, and, on the right, the historic sequence of messages being exchanged between the buyer and that supplier. At the bottom, there is a possibility to send a new message to the supplier.

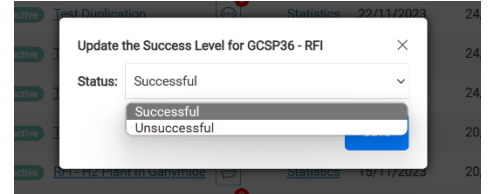


- iii. By clicking on the “Expired Requests” tab at the top menu, the system will present a list of the request whose Close Date has passed. As with active requests, it is possible to access any of it details. By

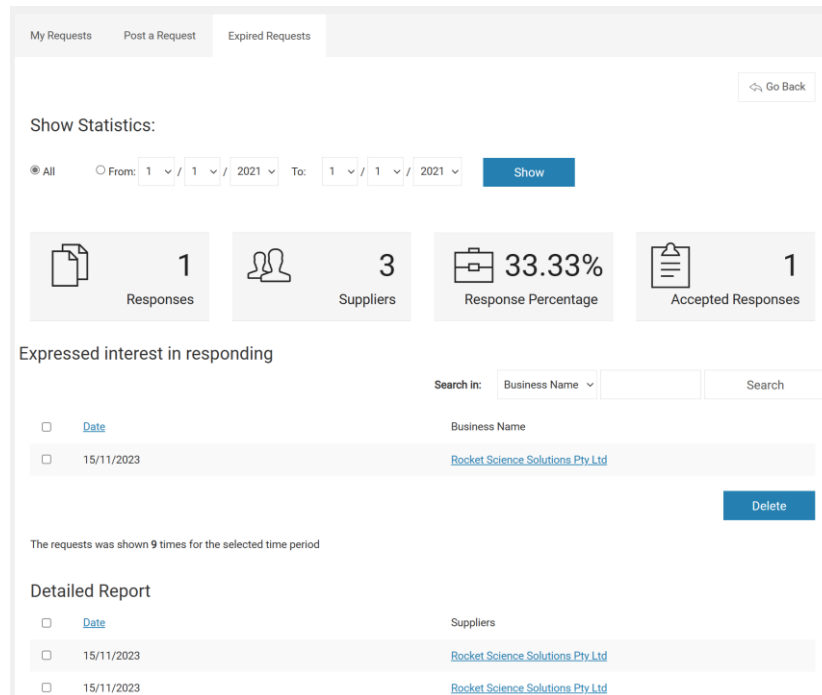
modifying one expired request, it is possible to extend the close date by entering a future day, allowing the matching suppliers to respond to the request.



iv. Also, by clicking on the  icon under the rightmost column "Success Level", the buyer can indicate if the objective of connecting with potential suppliers was successful or not. The main reason for this is to track the success rate of the platform to engaging with relevant suppliers.

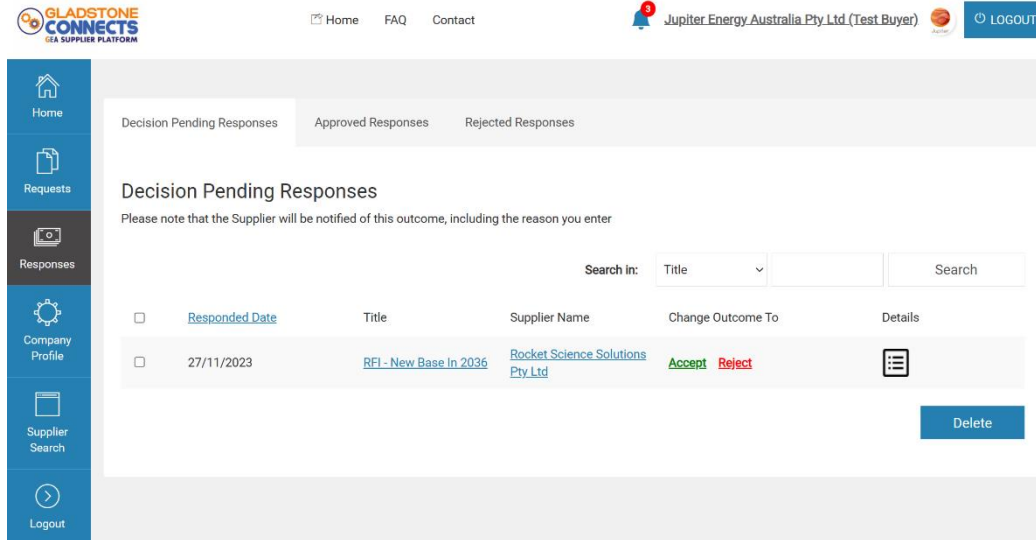


v. By clicking on the "Statistics" option for each request, the system will show the performance of the request in terms of engagement of suppliers, responses submitted and accepted.



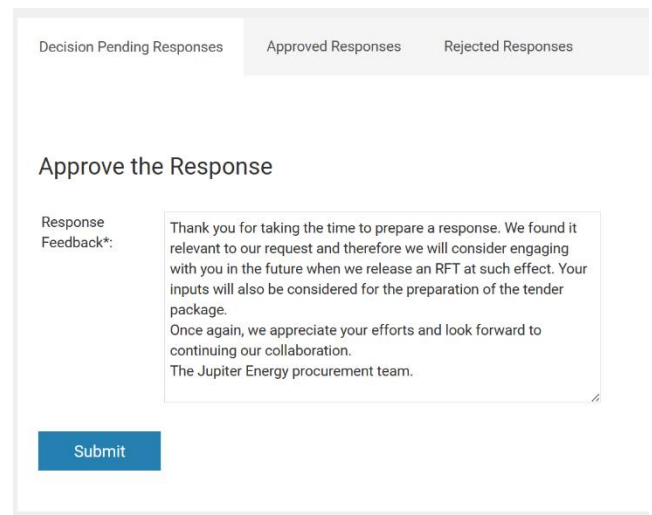
## 2.6. Responses by suppliers

By clicking on the **Responses** main menu option, you can access the list of responses to requests received by suppliers. Each response can be in one of the following three states: decision pending, approved or rejected.



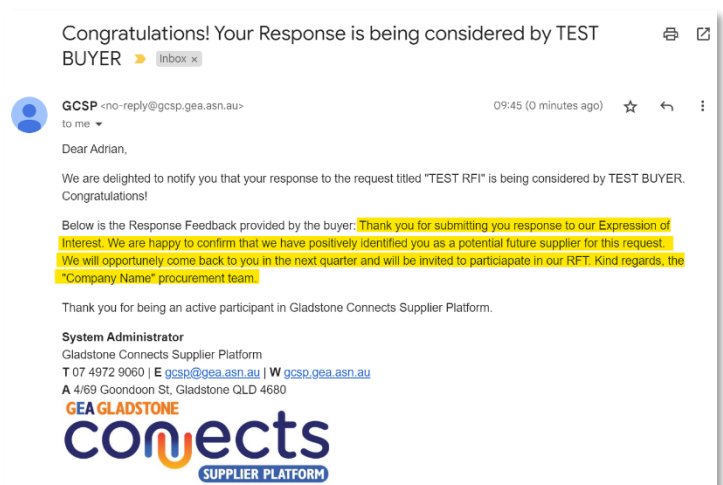
Each buyer organisation shall define what “Approved” or “Rejected” means, and the definition can change across organisations. The definition is ambiguous on purpose to give every organisation the flexibility they need to use the platform to review and connect with potential suppliers that have provided a relevant response, or to shortlist suppliers based on their response.

It is important to mention though, that when **Accepting** or **Rejecting** a response, a popup box will appear requiring an explanation from the buyer to be sent to the supplier with regards to that decision.

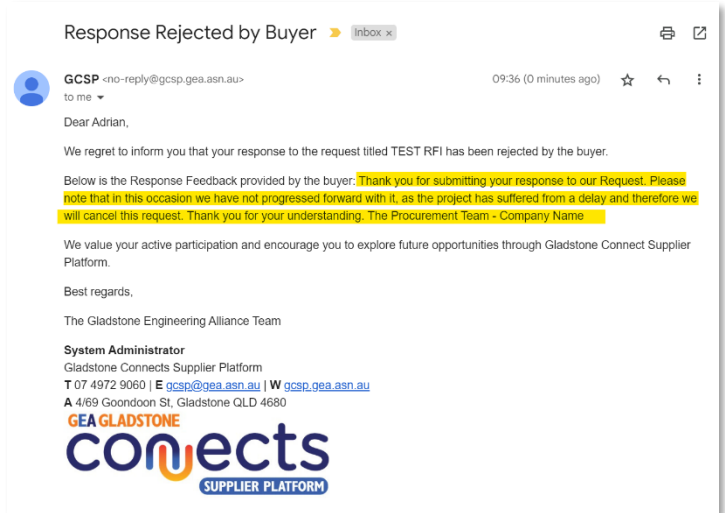


**▲ IMPORTANT:** if the buyer does not want to inform the supplier at all, then the Accept or Reject functionality shall not be used by the buyer. Alternatively, please ensure the message includes any disclaimer or clarification with regards to what the acceptance or rejection means in agreement with your internal processes.

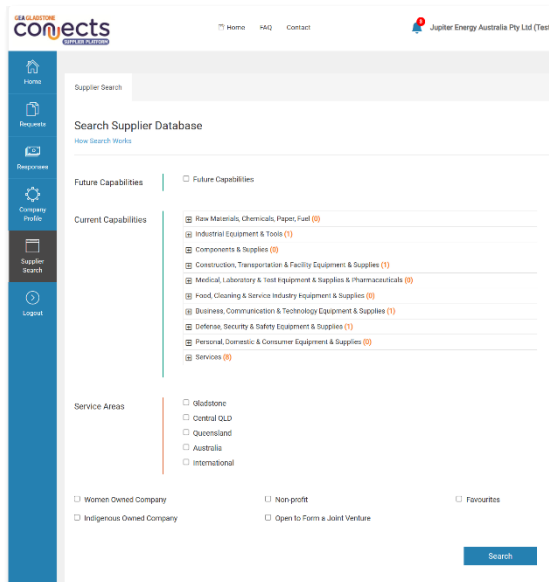
As a result, the supplier that submitted such response will be notified via email and in the platform. Please note **the reason you indicate** in the platform when you accept it will be included in an automatic email sent to the supplier as follows:



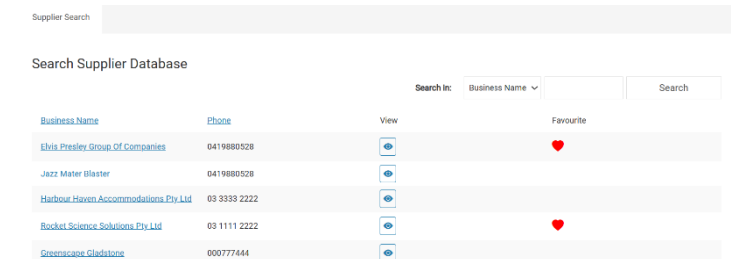
Alternatively, if you reject the response, **the reason you indicate** in the platform will be shown as follows:



## 2.7. Supplier Search



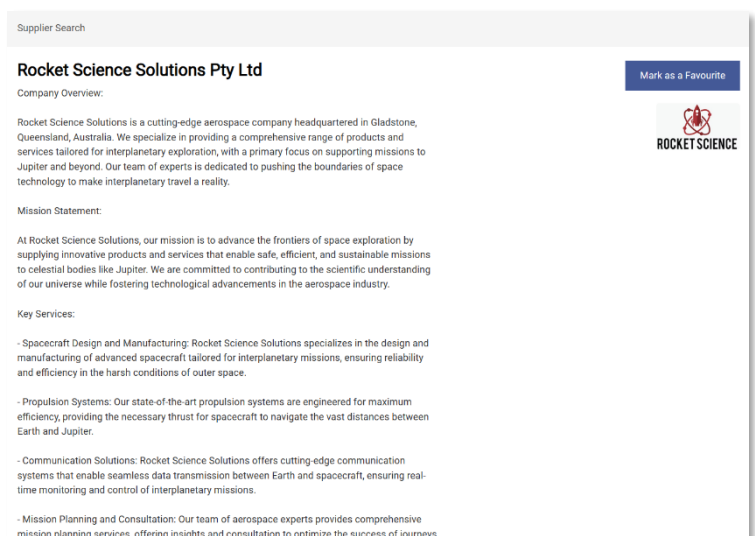
You can search among the local supplier's directory by filtering their capabilities, either Current or Future, their Service Areas and company classification. You can also filter by those that you have categorised as favourite.



The system will bring a list of suppliers from the database which you can further review by clicking on their name. This will take you to their company profile.

**IMPORTANT:** note that when accessing their company profile, the buyers will be able to know that your organisation has view their profile, how many times and when that happened.

Privately, you can mark the supplier as “favourite” to easily find it later in subsequent searches.

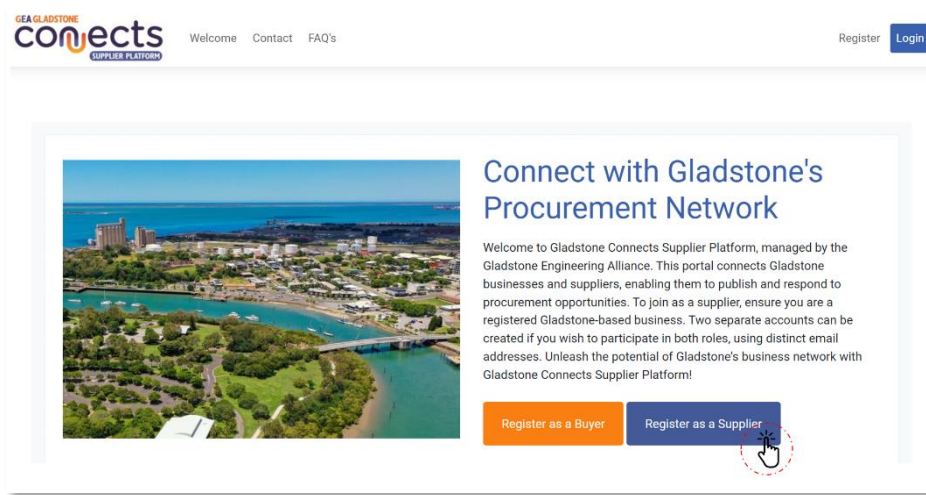


### 3. Supplier Functionalities

#### 3.1. Registration

New organisations looking to register in the platform as a supplier will need to follow a series of steps to become active in the system, as follows:

- v. Click on “Register as a Supplier” button in the Home Page:



- vi. Follow the instructions in the screen and fill in every mandatory field identified with an asterisk (\*).

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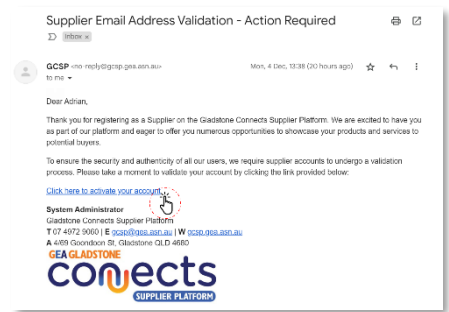
Submit the form and wait for an email to validate your account.

- vii. Check your email and find an email from us with the subject “Supplier Email Address Validation – Action Required”.

Click in the link provided to activate your account.

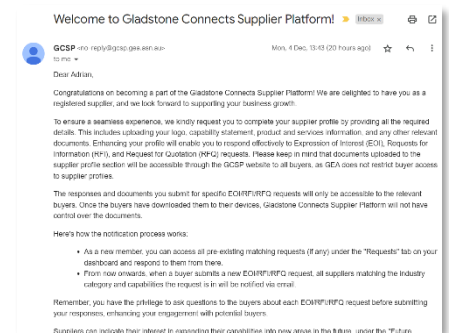
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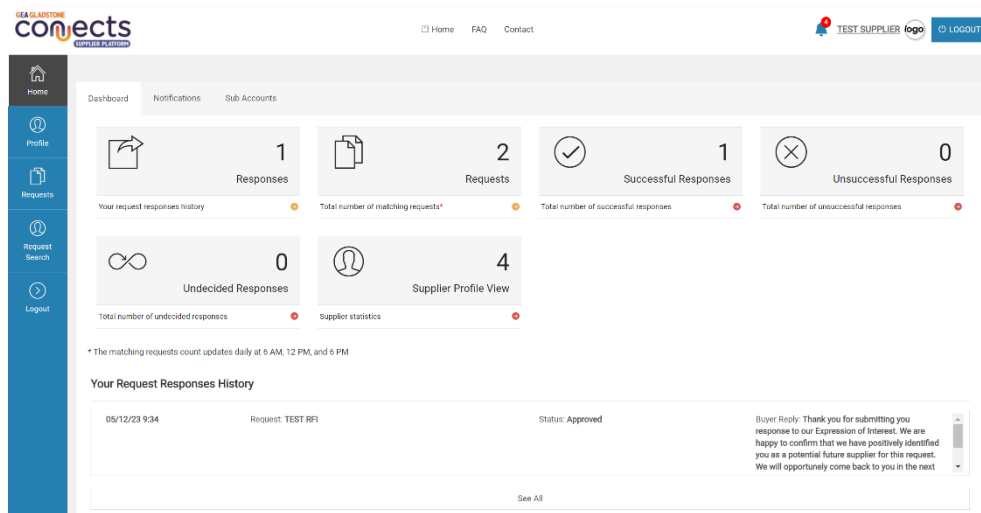
- viii. Once the GEA has reviewed your application, you will receive another email welcoming you to the platform with instructions of the different functions that you can perform as a buyer in the system.

From this moment onwards, you are fully onboard and can commence utilising the platform.



### 3.2. Dashboard and menu options navigation

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- iii. In the page’s top section, you will find the links to the Home page, Frequently Asked Questions and Contact details. In the top right corner, you will also see an icon indicating the number of relevant alerts and notifications, the name of your organisation, your logo, and Logout button to close your session.
- iv. In the left section, you will also have the possibility to access the main system functions such as:
  - a. Management of your company profile
  - b. Management of requests

c. Requests search engine

3.3. Manage your Supplier Company Profile

Building a comprehensive supplier profile will enhance your presence on the platform, attracting more relevant buyers and promoting transparency and visibility of the present and vision of the organisation in the Gladstone Region.

Take your time to populate the information required in a way that highlights your business strengths, your local presence and other values and encourage buyers to connect and interact in relation to purchase requests they publish.

i. In the top section of the page, you will be able to select which piece of information you want to view or modify business profile, password, your current capabilities, review statistics, Logo, photo gallery and future capabilities.

ii. By clicking on **Edit Business Profile**, you can modify:

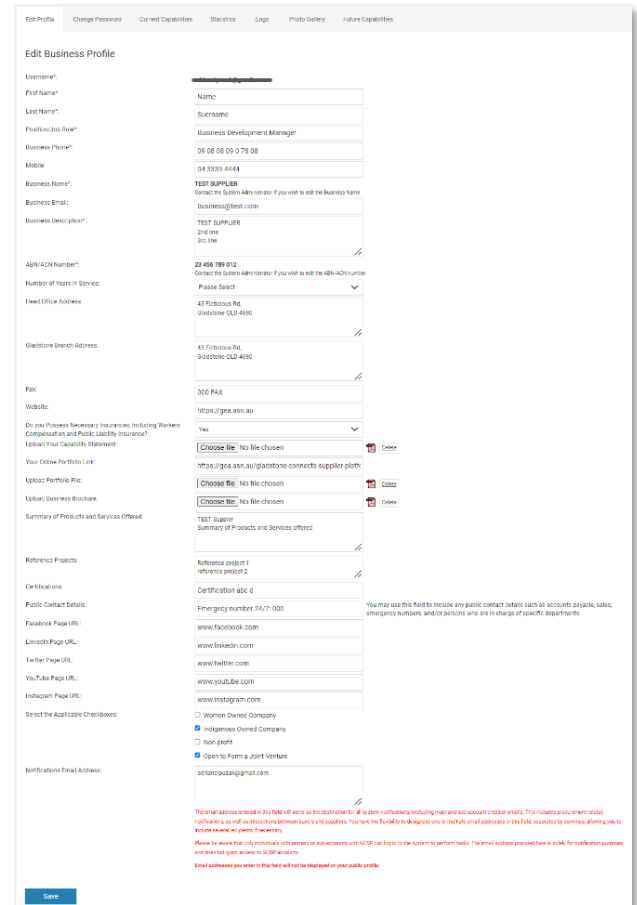
- Your personal and business contact information (first and last name, position/role, business phone, direct dial phone, mobile phone).

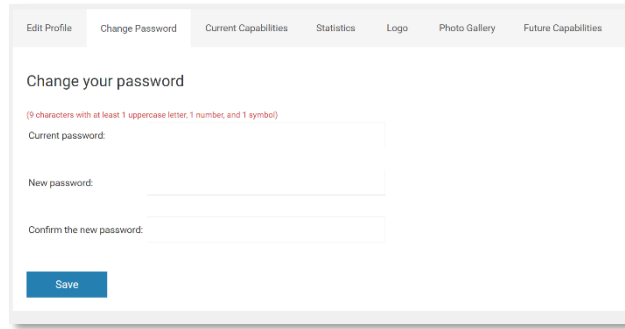
**▲ IMPORTANT:** Please note that the information you provide here will be visible and public by default.


- Your business data such as name and its description, ABN, organisation size, addresses, website, and social networks URLs, etc. You will also be able to select the checkboxes that describe if the business is Women owned, indigenous owned or non-for-profit.

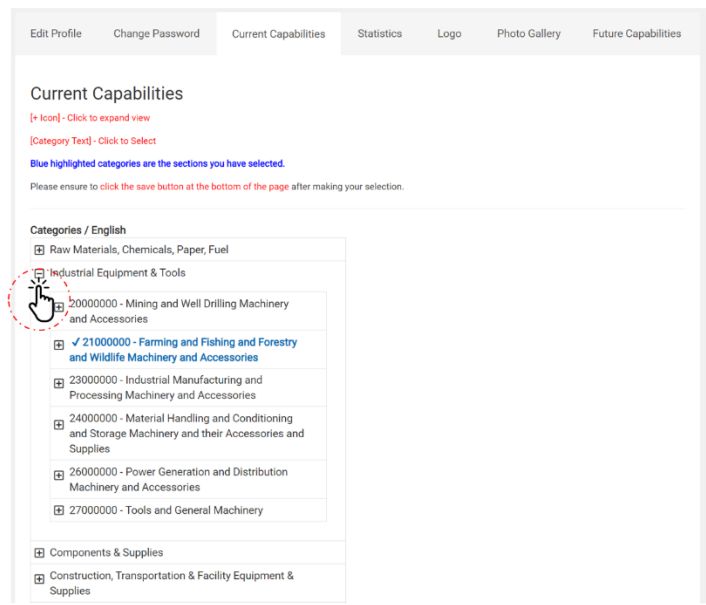
- Please make sure you upload the multiple PDF documents that describe what you do such as your company profile, brochure, and portfolio file if you have. You don't need to provide all this information but the best you describe your business the higher changes to be contacted by prospect clients in your area of expertise.

iii. By clicking on **Change Password**, you can modify your current login details:



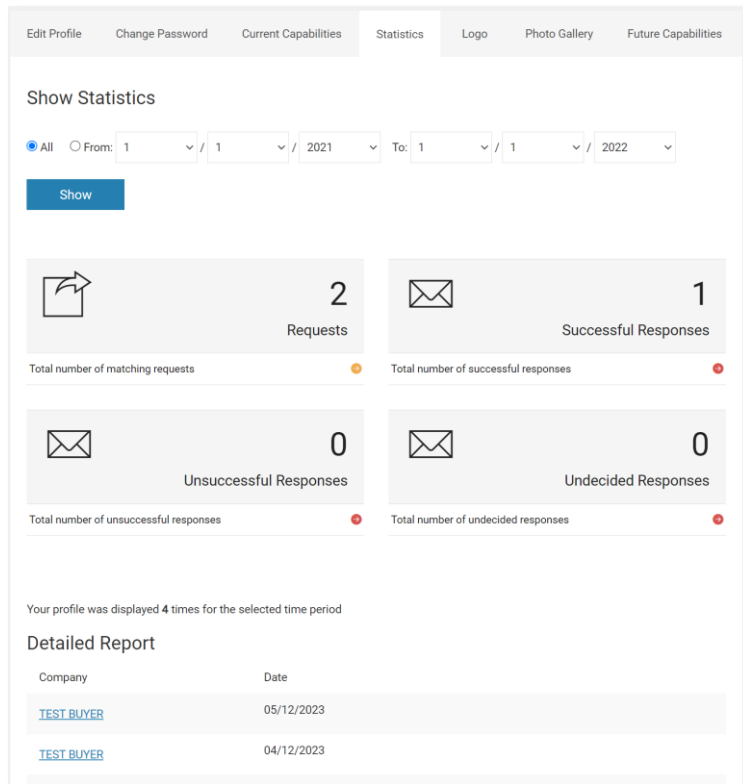


- iv. By clicking on **Current Capabilities**, you can define your business’ current capabilities and areas of expertise. You will need to select as many as possible and as precise as possible, to make sure that you receive the most relevant notifications from buyers creating purchase requests that match these capabilities you selected. Also, ensure you don’t omit any key capability you have to avoid missing out on relevant opportunities to be published by buyers. Your selection of multiple capabilities will also make you appear in the searches done by potential buyers when they browse the suppliers’ directory. To be able to select the relevant capabilities, click on the  icon to expand the categories and access the subcategory that best represents the products or services you offer. Do this multiple times to select multiple subcategories to best describe your business’ current capabilities.

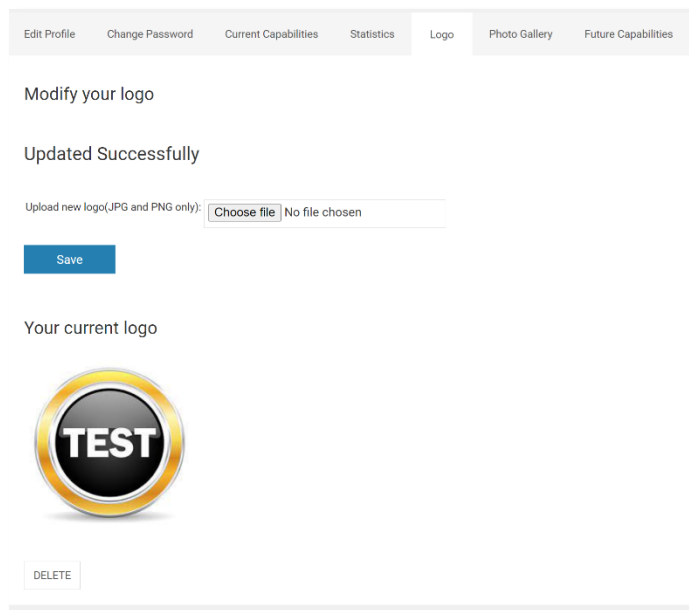


- v. By clicking on **Statistics**, you can find out (for any period) how many requests from buyers have matched your capabilities, how many of your responses to buyer requests have been successful or unsuccessful and how many responses are still undecided, waiting for a buyer’s decision. Additionally, you can see how many times your profile has been displayed, to which buyers, and when.

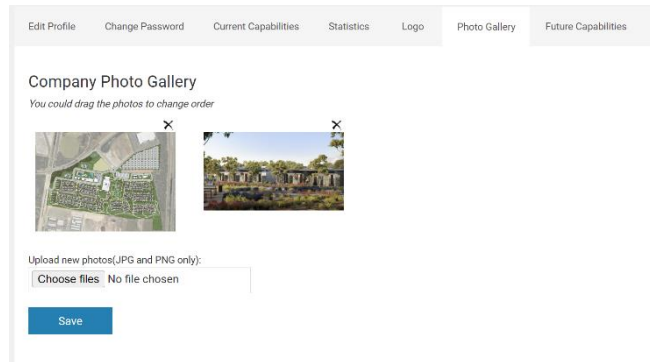




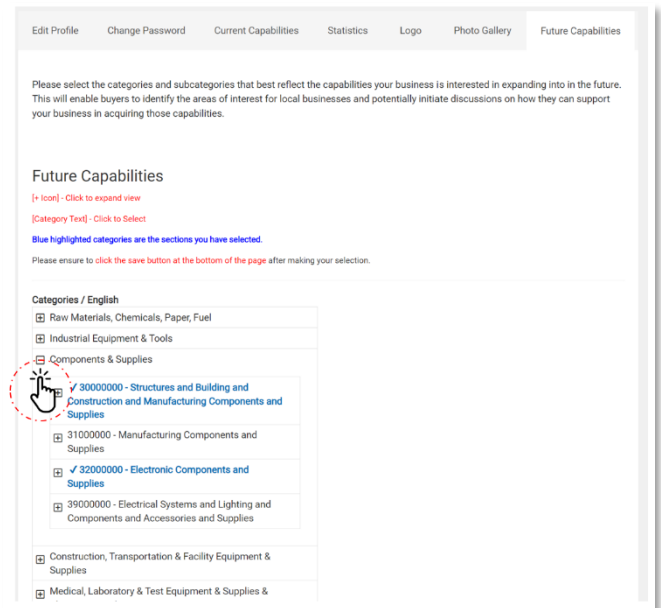
vi. By clicking on **Logo**, you can upload and change your company's logo:



vii. By clicking on **Photo Gallery**, you can upload photos that depict your organisation and its activities:



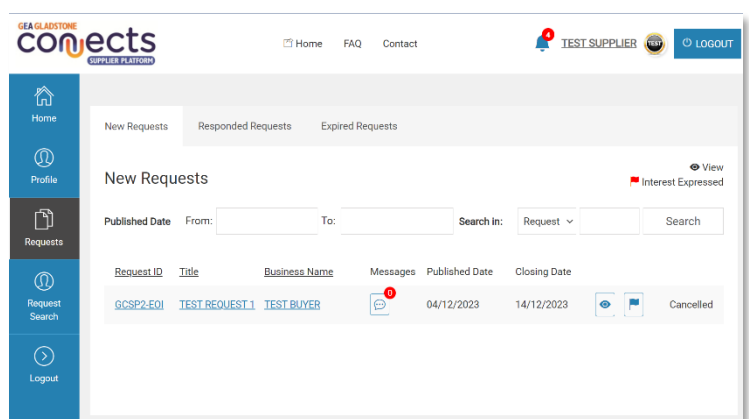
- viii. By clicking on **Future Capabilities**, please select the categories and subcategories that best reflect the capabilities your business is interested in expanding into in the future. This will enable buyers to identify the areas of interest for local businesses and potentially initiate discussions on how they can support your business in acquiring those capabilities.



### 3.4. Requests Management

By clicking on the left menu option **“Requests”**, you will be able to access the list of New, Responded and Expired Requests from buyers. You can also search within a particular time frame and access any of the requests listed in the screen by clicking on its ID, Title of **“view”** icon.

You can also access the buyer’s company profile by clicking on its Business Name.



Finally, you can access the messaging thread of Q&A between you and the buyer via the **“messages”** icon, which indicates the number of unread messages per request.

- i. By clicking on the any of the requests in the list, you will list access the details associated with it, from where you will be able to:

- **Notify the Buyer of your intention to respond:** click in this button if you want the buyer to be automatically notified that you intend to respond to this request. Providing feedback and improving the communication between the parties will help to establish better relationships.
  - **Download the request and all attachments:** if you want to work offline on your response until it is ready, you can download all the information provided by the buyer in a single zip file to your local computer.
  - **Ask a Question:** write to the buyer via the platform to ask any queries that might help you responding. Please note there is a deadline to ask questions for every request. You will be then able to go backwards and forwards with the buyer through the platform via this channel.
  - **Create a Response:** use this function to be able to upload your response documents and submit a final response to the buyer prior to the request submission deadline.
- ▲ **IMPORTANT:** Note that once a response to a buyer's request has been submitted, it cannot be modified as the buyer would have received a notification.

### 3.5. Request Search

By clicking on the left menu option “**Request Search**” it is possible to search among all open buyer request, with the possibility to filter by request type (EOI, RFI, RFQ), capabilities required, organisation type and service areas.

This function will let you be aware of the current needs by buyers at any point in time. Note that you would be able to work on those requests if you meet the matching criteria based upon your company profile settings. For those requests where you don't meet these criteria, you will be able to only read the requests but not interact with them.

▲ **IMPORTANT:** This function can prove valuable in identifying opportunities you may be missing out on. This could result from a mismatch between the capabilities you've outlined in your business profile and those sought by potential buyers. Consider acquiring new capabilities that will provide you with access to additional opportunities actively sought by buyers in the region, or review your profile to ensure all your capabilities are properly represented in your profile.

## 4. More information

### 4.1. Contact details