GFT Synertrade: Supplier Guide

How to: modify your profile – answer a QRFP – confirm an order – register an invoice
1. Introduction
   - Navigation
   - My Account

2. Quick Request for Proposal
   - Answer a Price request

3. Orders
   - Confirm an order

4. Invoices
   - Register your invoice
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 Synertrade 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](https://gft.synertrade.com)
- You will reach the Access page of the Portal

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"?

2. You will be re-directed to this page. Enter your login and email address

3. Click on button "Generate New Password"

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

1. Language
   - English (UK)
   - Spanish
   - Polish
   - German
   - Italian

PERSONAL SETTINGS   CLOSE   APPLY

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

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)
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
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:
- Time Zone
- 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

1. Click on button “New” to add a 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
**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**

1. Click on button “New” to add a certificate

A 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
Review your Profile – Upload or view other documents

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

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

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"

<table>
<thead>
<tr>
<th>Bank key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank SWIFT code</td>
</tr>
<tr>
<td>Bank account number</td>
</tr>
<tr>
<td>IBAN</td>
</tr>
<tr>
<td>Payment currency</td>
</tr>
<tr>
<td>Bank name</td>
</tr>
<tr>
<td>Bank street</td>
</tr>
<tr>
<td>Bank city</td>
</tr>
<tr>
<td>Bank country Spain</td>
</tr>
<tr>
<td>Region Other</td>
</tr>
<tr>
<td>Bank branch</td>
</tr>
<tr>
<td>Bank account holder</td>
</tr>
</tbody>
</table>

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

Click Here

This e-mail as well as any attached files is confidential and may also contain information which is legally privileged. It is intended solely for the use of the individual or the entity to whom it is addressed. If you are not the intended recipient of this e-mail, you are hereby on notice of this status. Any disclosure, copying, distribution, dissemination or publication of the information contained therein is strictly prohibited, unless you have been permitted thereto by the sender. If you are not the intended recipient please return this e-mail immediately to the sender and then delete this message from your system. The sender is not liable for the proper transmission of this information nor for any delay in its receipt.
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)
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

4. Enter your Unit Price

5. Save

6. Enter any relevant comment to your 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

1. Enter your Unit Price
2. Save
3. Enter any relevant comment to your offer
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 address
- 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

<table>
<thead>
<tr>
<th>No.</th>
<th>DOC. NO.</th>
<th>SAP RECEIPT NO.</th>
<th>NAME</th>
<th>POSITION NO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LR0000461</td>
<td>test_pdf04</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>LR0000461</td>
<td>test_request_04-04-2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>LR0000461</td>
<td>test_no_order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>LR0000461</td>
<td>test.pdf.italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>LR0000461</td>
<td>test.pdf.italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>LR0000461</td>
<td>test.pdf.italy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery/Return notes to be billed</td>
<td>List of delivery/return notes to be invoiced</td>
</tr>
<tr>
<td>Orders to be billed</td>
<td>List of orders to be invoiced</td>
</tr>
<tr>
<td>Submitted billing request</td>
<td>List of invoices submitted</td>
</tr>
</tbody>
</table>
Delivery/Return notes to be billed

- This window 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.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Order ID</th>
<th>Order External Number</th>
<th>Document ID</th>
<th>External Document ID</th>
<th>Delivery Note ID</th>
<th>Date of Reception</th>
<th>Business Unit</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>ORD000363</td>
<td>DN000356</td>
<td></td>
<td></td>
<td>postin 01</td>
<td>26.04.2021 12:41</td>
<td>GFT IT Consulting S.L.U.</td>
<td>Delivered</td>
</tr>
<tr>
<td></td>
<td>ORD000395</td>
<td>DN000345</td>
<td></td>
<td></td>
<td></td>
<td>22.04.2021 11:45</td>
<td>GFT Italy S.r.l.</td>
<td>Delivered</td>
</tr>
</tbody>
</table>

Billing request without reference will be only allowed for Non-PO suppliers.
Orders to be billed

- This window 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 without reference will be only allowed for Non-PO suppliers
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.

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

Quantities and Unit Prices can be adjusted.

Document date and number are mandatory fields.

Billing document can be attached.
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.

Filters can be applied.

Clicking on any part of a submitted billing request, its details are shown.
Shaping the future of digital business

GFT Italia S.r.l.
GFT Experts GmbH
GFT Poland Sp. z o.o.
GFT Smart Technology Solutions GmbH