

# PowerAdvocate Sourcing Intelligence<sup>®</sup>



Suppliers' Frequently Asked Questions  
May 2016

# How do I log in to Sourcing Intelligence?

- 1.) Launch a web browser and go to [www.poweradvocate.com](http://www.poweradvocate.com), and then click the orange **Login** button.
- 2.) Enter your account **User Name** and **Password** (both are case-sensitive).
- 3.) Click **Login**.

PowerAdvocate - Login

User Name:  [Forgot User Name](#)

Password:  [Forgot Password](#)

[Frequently Asked Questions](#)

PowerAdvocate

Dashboard Profile Company Help Logout

Events Portals Contracts

Dashboard

Company Filter: All Companies

Fill-In Data Sheets

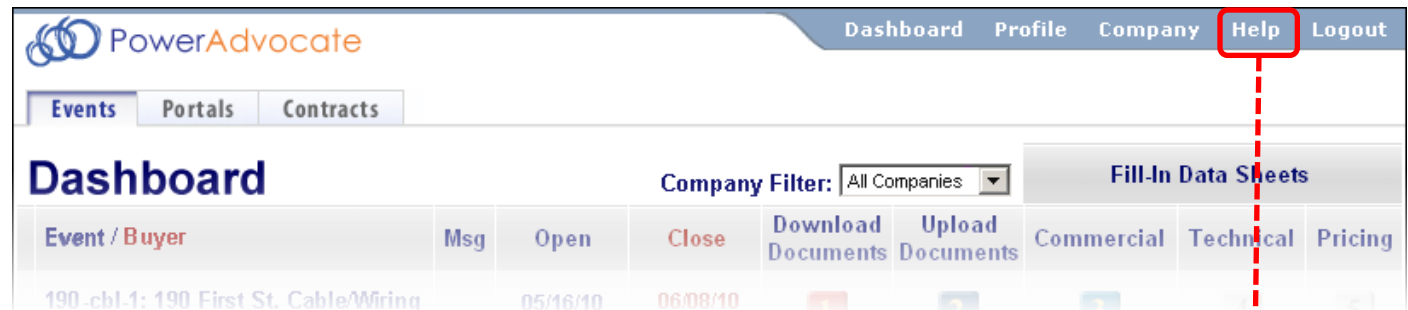
Event / Buyer	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
190-cbl-1: 190 First St. Cable/Wiring		05/16/10	06/08/10					

## Tips

- Participating in a Reverse Auction requires logging into PowerAdvocate using IE9 or higher.
- If you received an email from a Bid Event Coordinator inviting you to register, follow the instructions in the email to complete the registration process.
- **Portals** and **Contracts** tabs may appear if buyers also subscribe to Supplier Intelligence or Contract Intelligence, respectively. An **Opportunities** tab may also appear, which is described on page 5.

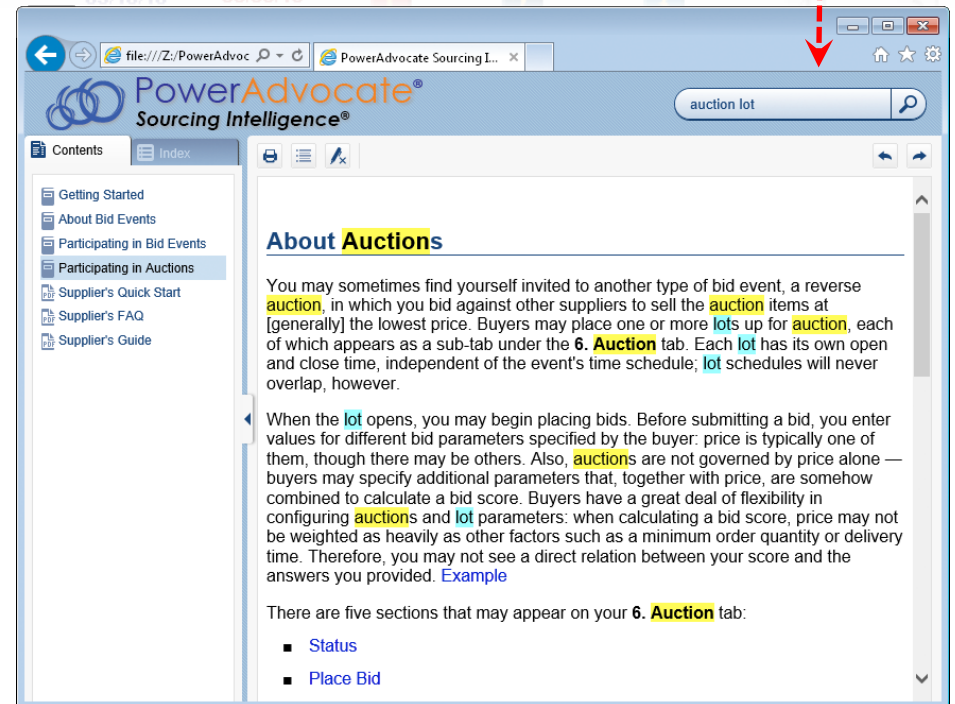
# How do I get more information if I need it?

You can contact PowerAdvocate Support at support@poweradvocate.com or by calling **857-453-5800**, Monday through Friday (excluding U.S. Federal Holidays) from 8:00 AM to 8:00 PM Eastern Time



## Online Help

- You can access the Help System at any time by clicking **Help** on the main navigation bar
- The Help System opens in a new window; use full-text search to get a ranked list of relevant help topics
- The Help System is fully navigable, with features such as search term highlighting
- You can download PDF versions of the documentation from within the Help System



# What information is displayed on my Dashboard?

Your Dashboard displays all bid events to which you have been invited. )

**Dashboard** Company Filter: All Companies

Event / Buyer	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
190 -cbl-1: 190 First St. Cable/Wiring Electric Power Utility		05/16/10 8:00 AM EDT	06/08/10 4:00 PM EDT	1	2	3	4	5
T42g: Colorado River Sluice Gates Great Western Utilities	1/1	04/04/10 10:00 AM EDT	06/30/10 4:00 PM EDT	1	2	3	4	5
1998-01: Grid Expansion Electric Power Utility		09/01/10 8:00 AM EDT	12/29/10 4:00 PM EST	1	2	3	4	5

Open and Pending Pre-Bid events

Pending (not Pre-Bid) and Closed events

Buying entity

Event name/number

Number of unread/total messages; click to access the **Messaging** tab.

The numbers on the Dashboard represent a general workflow, though you can work in any order:

- 1 Download the bid package.
- 2 Upload bid documents, proposals, etc.
- 3 4 5 Fill in online datasheets if present.

## Tips

- If an event is missing a type of datasheet, that number & its corresponding tab are grayed out (e.g., 3).
- Events with links in the **Msg** column use PowerAdvocate Messaging; others use standard email.
- Supplier contacts are invited individually by the buyer

# How do I find other supplier opportunities?

Buyer companies have the option to make their bid events visible to all PowerAdvocate-registered suppliers.

When these opportunities exist, your **Opportunities** tab displays some high-level event information for you to evaluate.

Events		Opportunities				
Opportunities Dashboard						
	Event Title	Company	Products / Services	Open Date	Close Date	Accessible
+	Actuators	Acme Electric	Controls	08/18/2015 8:00 AM EDT	08/31/2015 4:30 PM EDT	
-	Next-Gen Boiler Upgrade	Universal Energy	Boiler Components	08/15/2015 8:00 AM EST	12/31/2015 4:00 PM EST	
<b>Description:</b> Looking for a cutting-edge implementation for a green building in the planning stages.						
+	Project Simulator	Solar Arrays LLC	Construction Services	08/01/2015 8:00 AM EDT	09/07/2015 4:00 PM EDT	Pending
+	Site 101 Rough-out	Sheridan Builders	Piping	07/01/2015 9:00 AM EDT	12/31/2015 6:00 PM EST	

To request access to a posted event:

1. Click .

A pop-up appears asking you to verify your qualifications. You may also enter Optional Comments to the buyer, if you have something to add.

2. Click **Submit Request**.

The Accessible column will display Pending until the buyer approves your request. Once approved, the event will appear on your Events tab. If the buyer does not approve your request, the event will be removed from your Opportunities tab.

## How do I access the buyer's bid package?

Once a buyer invites you to participate in a bid event, that event appears on your Dashboard. You can begin downloading the buyer's bid documents after the event opens. From the Dashboard, click **1** to access the **1. Download Documents > Bid** tab, where you can download the buyer's entire bid package, download selected documents, or view individual documents online.

If the buyer invites you to Pre-Bid, you can access documents from the **1. Download Documents > Pre-Bid** tab before the event opens; the buyer must approve your Pre-Bid submittal before you can access the **Bid** sub-tab. Likewise, a **1. Download Documents > Post Bid** sub-tab indicates an invitation to post-bid negotiations.

Click **Download Selected Files** to download the selected documents.

Click **Select All** to select all files in the bid package.

The screenshot shows a red header bar with the text '1. Download Documents'. Below it are two tabs: 'Pre-Bid' and 'Bid'. Under the 'Bid' tab, there are three buttons: 'Select All', 'Download Selected Files', and 'Clear All'. Below the buttons is a table titled 'Technical Information' with columns: Document Description, Issue Date, Ref ID, Rev #, File Name, File Size, and Download. The first row of the table contains: Pier23 Pilings RFP, 5/30/10, 133-01, C, p23pile.pdf, 742 KB, and a checkbox.

Document Description	Issue Date	Ref ID	Rev #	File Name	File Size	Download
Pier23 Pilings RFP	5/30/10	133-01	C	p23pile.pdf	742 KB	<input type="checkbox"/>

Click a document **File Name** to open and view it online

If there are multiple documents, you can selectively download them )

### Tip

- Selected documents are saved in a .zip file named **BidPackage-nnnn-n.zip** (nnnn-n is a unique ID).

# How do I submit documents to the buyer?

1. Go to the **2. Upload Documents** tab and select the appropriate sub-tab.

2. Select a **Document Type** and enter a brief **Doc Description**.

3. Click **Browse**, navigate to your document, and click **Open**.

4. Click **Submit Document**.

**2. Upload Documents**

Pre-Bid Bid

### Upload Bid Proposal

Document Type \* (Select from List) Issue Date 01/06/2011 Reference ID \* Required Field

Select File(s) Location Browse... Selected File(s) p23 abp\_rev2.pdf X p23 eir.pdf X Submit Document

### Bid Submissions

Commercial

Document Description	Issue Date	Ref ID	File Name	File Size	Upload Date	Actions
Pier 23 Architectural	6/01/10	133-22	p23 abp.pdf	420 KB	6/01/10	

## Tips

- **Issue Date** and **Reference ID** are optional, though they are helpful for tracking documents.
- You can add, modify () , or delete () documents at any time before the event closes.
- There is no limit on the number or size of documents that you can upload; multiple files can also be compressed into a .zip archive for upload.
- Late documents, if the buyer opts to accept them, are flagged in red text.

# How do datasheets work?

In addition to your proposal, buyers often request that you complete datasheets as part of your bid package. Datasheets are online forms that allow buyers to collect specific data to tabulate and compare across suppliers.

1. Click one of the datasheet tabs.

2. Fill out the required information in the online form.

The screenshot shows a web application interface with a navigation bar. The navigation bar has several tabs: 'Status', '1. Download Documents', '2. Upload Documents', '3. Commercial Data', '4. Technical Data', '5. Pricing Data', and 'Messaging'. The '3. Commercial Data' tab is highlighted. Below the navigation bar, there are four sub-tabs: '1. Supplier Info ...', '2. M&WBE Rep ...', '3. Company - 27 ...', and '4. Commercial'. The '4. Commercial' sub-tab is active. Below the sub-tabs, there is a 'Save Data' button and a text input field. A red line points from the 'Save Data' button to the instruction '3. Click Save Data.'

3. Click **Save Data**.


## Tips

- Multiple users from the same company cannot simultaneously fill out a datasheet — when one user saves, others' work will be lost.
- Be sure to click **Save Data** before navigating elsewhere, or data may be lost. Save your work often.
- There is no **Submit** button. Data is automatically submitted when the bid closes.
- The buyer may block access to datasheets once the bid closes.



## How do I communicate with the buyer? (1 of 2)

The buyer uses one of the following messaging options in Sourcing Intelligence:

- **Standard email** – Click an  icon to create a message to the buyer contact in your default email application.



The screenshot displays a user interface for a sourcing event. At the top left, the event ID is "17579 : Widgets and Gizmos" and the buyer is "Electric Power Utility". The event is open from "08/19/09 08:00:00 AM EDT" to "09/15/09 04:00:00 PM EDT", with "21 days 2 hours 56 mins 5 secs" remaining. The buyer contact is "Cathy Walsh", with an envelope icon circled in red. Below this are several tabs: "Status", "1. Download Documents", "2. Upload Documents", "3. Commercial Data" (highlighted in orange), "4. Technical Data", and "5. Pricing Data". A secondary row of tabs includes "1. Supplier Info ...", "2. M&WBE Rep ...", "3. Company - 27 ...", and "4. Commercial". A "Printable" icon is visible on the right. At the bottom, a "Save Data" button is next to a warning: "Your information can be changed after it is saved. If you leave this page without saving it first, you will lose all unsaved data."

- **PowerAdvocate Messaging** – See the following slide. )

# How do I communicate with the buyer? (2 of 2)

## To create a message in PA Messaging:

1. Click the event's **Messaging** tab or the link in the **Msg** column on your Dashboard.
2. Click **Create New Message**.

The screenshot shows the PA Messaging interface. At the top, there are tabs for 'Status', '1. Download RFP', '2. Upload Proposal', '3. Commercial Data', '4. Technical Data', '5. Pricing Data', and 'Messaging'. The 'Messaging' tab is selected. Below the tabs, there is a 'Create New Message' button circled in red. To the right of this button is a search box labeled 'Search Inbox:' and a 'Send email notifications?' checkbox with 'Yes' selected. Below the search box is an 'Inbox (3)' section with a table of messages. The table has columns for 'Status', 'Date', 'From', 'Company', and 'Subject'. The messages are:

Status	Date	From	Company	Subject
✉	9/29/07 2:58 PM EDT	Peter Holm	Elsbeth International	engineering specialist
✉	9/29/07 2:53 PM EDT	Cindy Walsh	Electric Power Utility	site visit rescheduled
✉	9/29/07 2:52 PM EDT (3)	Cindy Walsh	Electric Power Utility	structural specialist

Below the inbox are sections for 'Sent (1)' and 'Drafts (1)'. To the left of the inbox is a 'Create Message' form with fields for 'To:', 'Cc:', 'From:', 'Date:', 'Subject:', and 'Message:'. The 'Message:' field contains the text 'Could we reschedule the Substation #3 visit to 3:30pm?'. Below the form are buttons for 'Send', 'Save Draft', and 'Close'. To the right of the inbox is a 'View Message' window showing details for the selected message. The subject is 'site visit rescheduled'. The 'Message:' field contains the text 'Are there any questions we need to address at the site visit? -- Cindy'. Below the message are 'Attachments:' and a table of attachments:

Description	Type	Date	RFX	View
site prep questions	Message Attachment	10/3/07		📄

At the bottom of the 'View Message' window are buttons for 'Reply' and 'Close'.

## To view a message:

- Click the message subject or status icon (✉ / ✉)

## Tips

- New messages are sent to the Bid Event Coordinator and copied to the Buyer and Supplier Teams.
- Messages/file attachments are embedded within an event, and cannot be viewed outside of that event.
- Messages are sent to entire teams; one-to-one messaging is not allowed.
- You can choose to receive [external] email notifications of new event-related messages.