



USER MANUAL- VERSION-1

USETPA User Manual – Version-1

Roles:

1. Buyer
2. Vendor
3. Admin

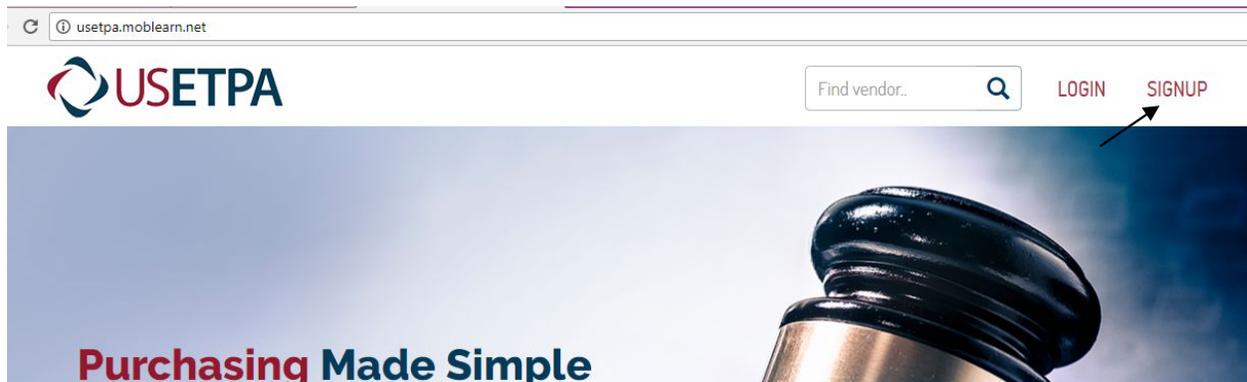
Functionalities and Flow of Buyer

1.1 **Buyer Sign up:** To become a buyer, user should register with the following mandatory details

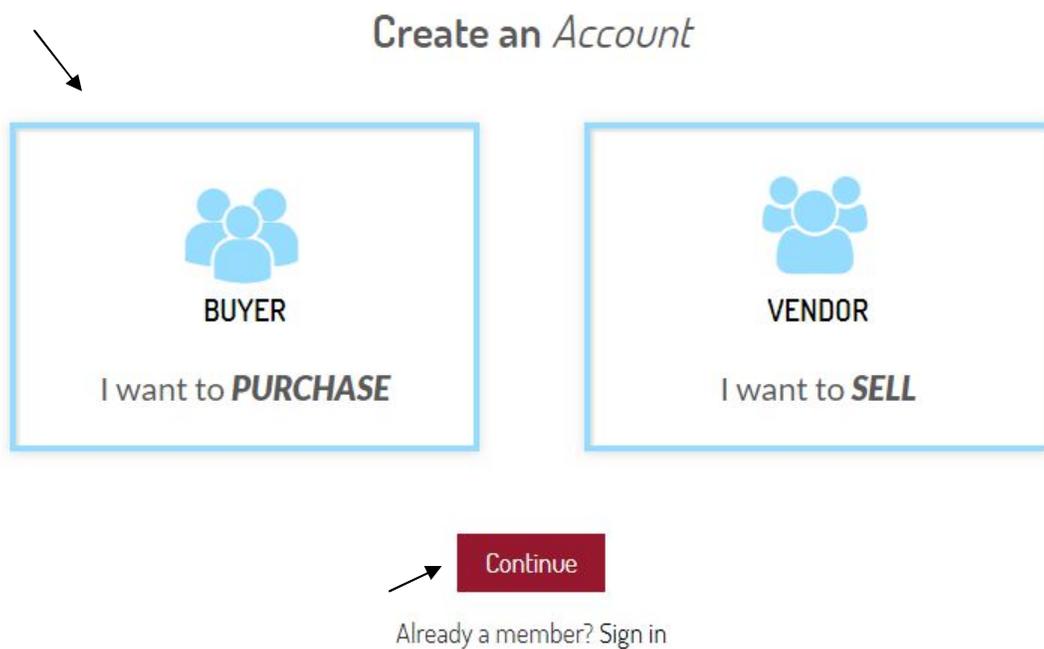
- a. Entity name
- b. Entity type drop down
- c. Entity address
- d. Tax id/EIN
- e. Contact Name
- f. Contact Title
- g. Telephone
- h. Contact Email

Click Submit button, once all the above fields are filled and completed.

To register as a Buyer, navigate and Click,



Once sign up is clicked, select the following role as Buyer



Click the Buyer and click continue button, the following page will appear with the fields

Register as a *Buyer*

<input type="text" value="Entity Name"/> 	<input type="text" value="Entity Type"/> 
<input type="text" value="Entity Address"/> 	<input type="text" value="TAX ID #/EIN"/> 
<input type="text" value="Contact Name"/> 	<input type="text" value="Contact Title"/> 
<input type="text" value="Telephone"/> 	<input type="text" value="Contact Email"/> 

Yes No

I wish to be notified of "Buy Now" opportunities

Yes No

Welcome mail will be sent to the user once they register as buyer by providing above details

1.2 **Welcome Email:** Welcome email will be triggered once the user submits the mandatory details to become a buyer

1.3 **Admin Approve the Buyer:** When the buyer registers into the site, admin will review his details and approve him for further project posting and buying products

1.4 **Buyer sign in:** Buyer requires "Email" and "Password" to login their account

Navigate to the link "Sign in" to get the sign in

Quick *Login*

[Forgot Your Password?](#)

[Remember Me](#)

Login

Cancel

Not a registered User Yet? [Sign UP](#)

1.5**Forgot Password:** User can recover their password by entering the email that used during sign up. Navigate to the “sign in”, by clicking the link “Forgot Password?” a screen appears to enter the email address.

Get a New *Password*

Enter the information below and we'll send you an email with the next steps to get a new password.

Submit

Once the user submits the form, password recovery email will be sent to their respective email address

The user needs to click the link that is sent as email to their inbox. It redirects to the password recovery page where the user needs to update with their new password

Create a New Password

*Password**

*Password confirmation**

[Change My Password](#)

2. On successful registration of Buyer, it takes the buyer to the dashboard page with all the tabs

My Projects Find Vendors My Account Specials Find Specials Inbox 0 Welcome, Buyer

Status: All [NEW QUOTE REQUEST](#) **70 COMPLETED** [Edit Profile](#)

Category: All Sort by: All Posted

NO PREVIEW

[Access points](#)
Project Status: Closed / Messages: 0 / Category: Networking /
Sub Category: Wireless (Access Points, Routers, and Controllers) /

Buyer will post the projects for bidding by clicking the above link “New Quote Request”

Project Title * Product Category

Project title Project category

Project Description *

Attach Files + Add More


 Drag and drop a file here or click

After entering all the details, project will be posted and it will be shown on the My projects tab as shown below

[My Projects](#)
[Find Vendors](#)
[My Account](#)
[Specials](#)
[Find Specials](#)
Inbox

Status: All Search My Project NEW QUOTE REQUEST

Category: All Sort by: All Posted

NO
PREVIEW
AVAILABLE

Test 00D:18H:20M:16S

Project Status: Opened / Messages: 0 /

Category: End User Devices / Sub Category: Servers /

Child Category: Avaya /

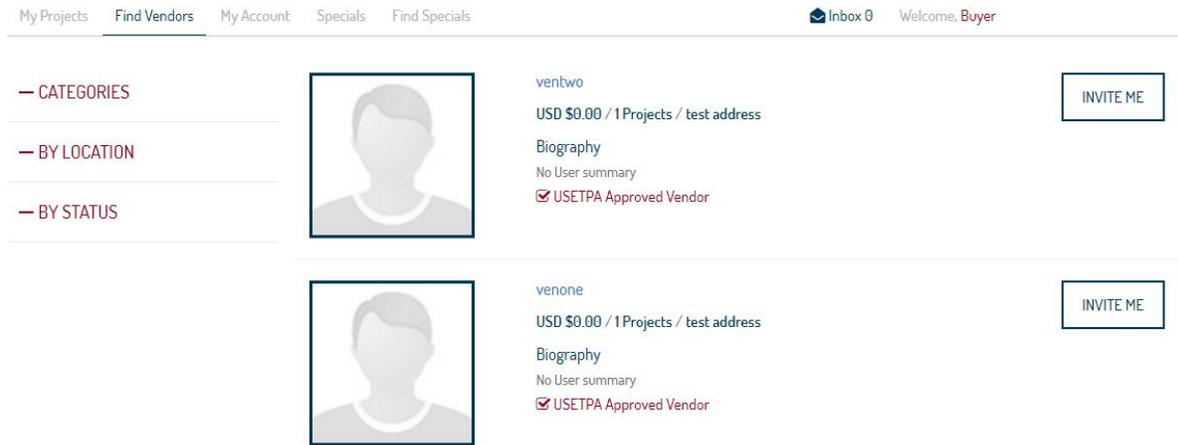
Project Completion/Delivery Date: 08/30/2017 14:30 pm /

Location: Colorado

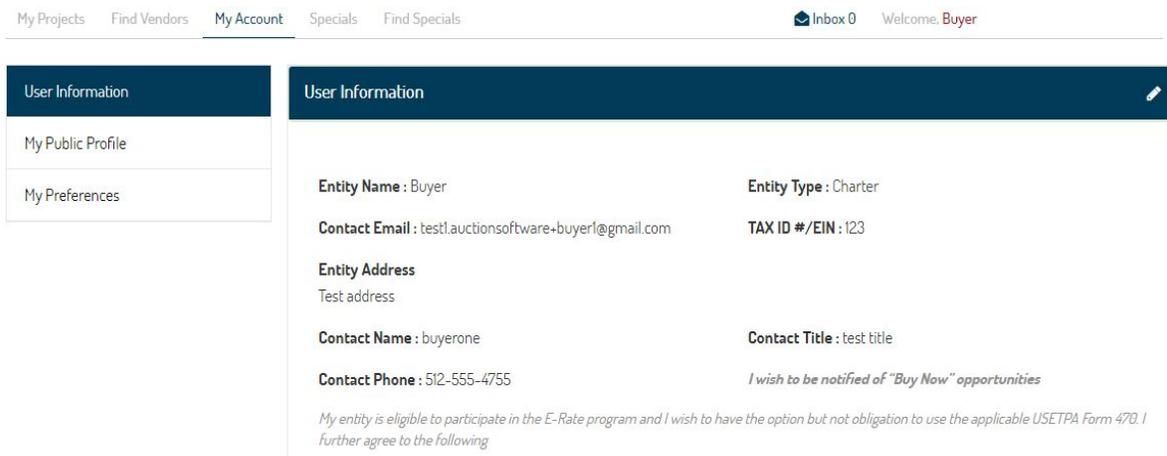
0 Proposals
Delete Request

Now, the vendor will submit his proposal on the above opened project

2.1 Buyer dashboard > Find Vendors : In buyer dashboard, find vendors tab will display the vendors who are registered and buyer can invite him for his posted projects by seeing the vendors category and location



2.2 Buyer dashboard > My Account: By clicking the My account tab, the page will display the user information and the user can edit and save his informations like public profile, Time zone management etc.,



2.3 Buyer Dashboard > Specials: In specials tab, it will display all the opened and closed products which we have sent the request.

2.4 Buyer Dashboard > Find Specials: In find specials tab, the user can able to see the products which are posted by the vendor for Buy now option.

Status

All ▼

Search My Project 🔍

Category

All ▼

Sort by

All Posted ▼



Third special

01D:02H:21M:
09S

Special Status: Opened / Category: Networking /

Sub Category : Network Security / Child Category : Acer /

Available Quantity: 4 / Price: US \$300.00

2 Requests

[View Request](#)

Find Specials tab will display the page like below :

Search My Project 🔍

Category

All ▼

Sort by

All Posted ▼



Third special

01D:02H:18M:52S

Project Status: Opened / Category: Networking /

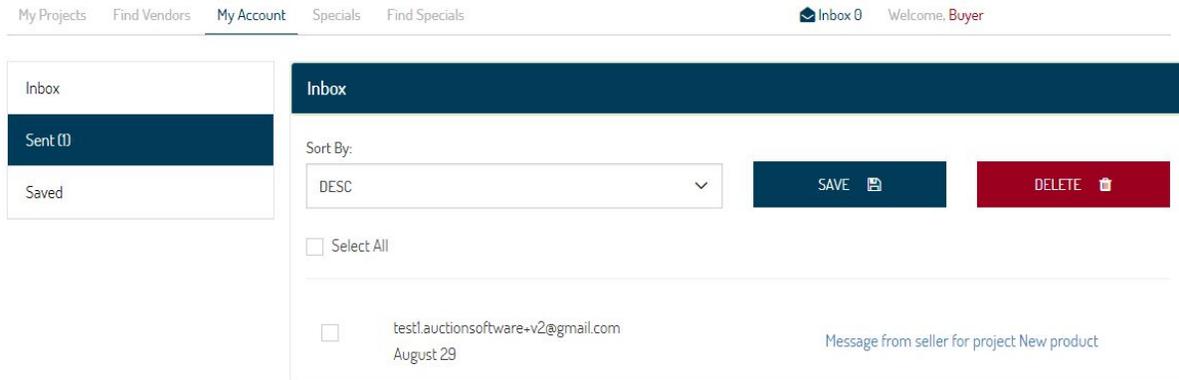
Sub Category : Network Security / Child Category : Acer /

Available Quantity: 4 / Price: US \$300.00

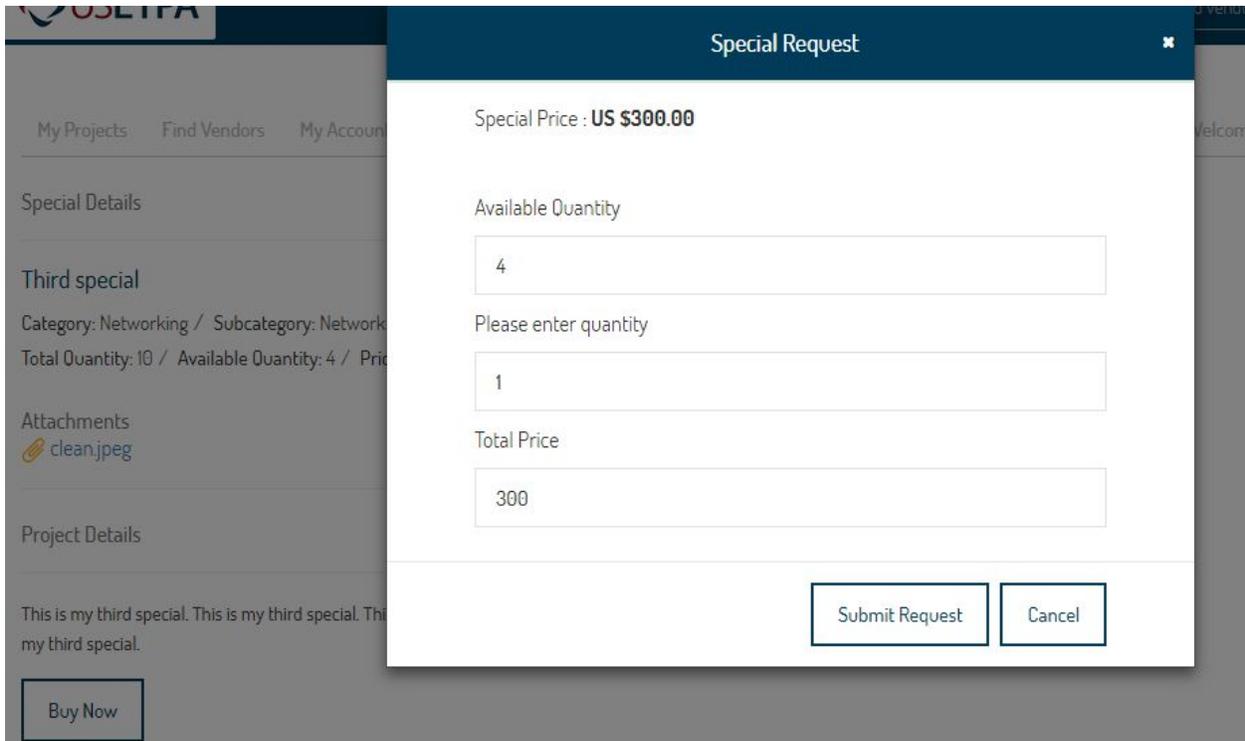
Requests 2

[Buy Now](#)

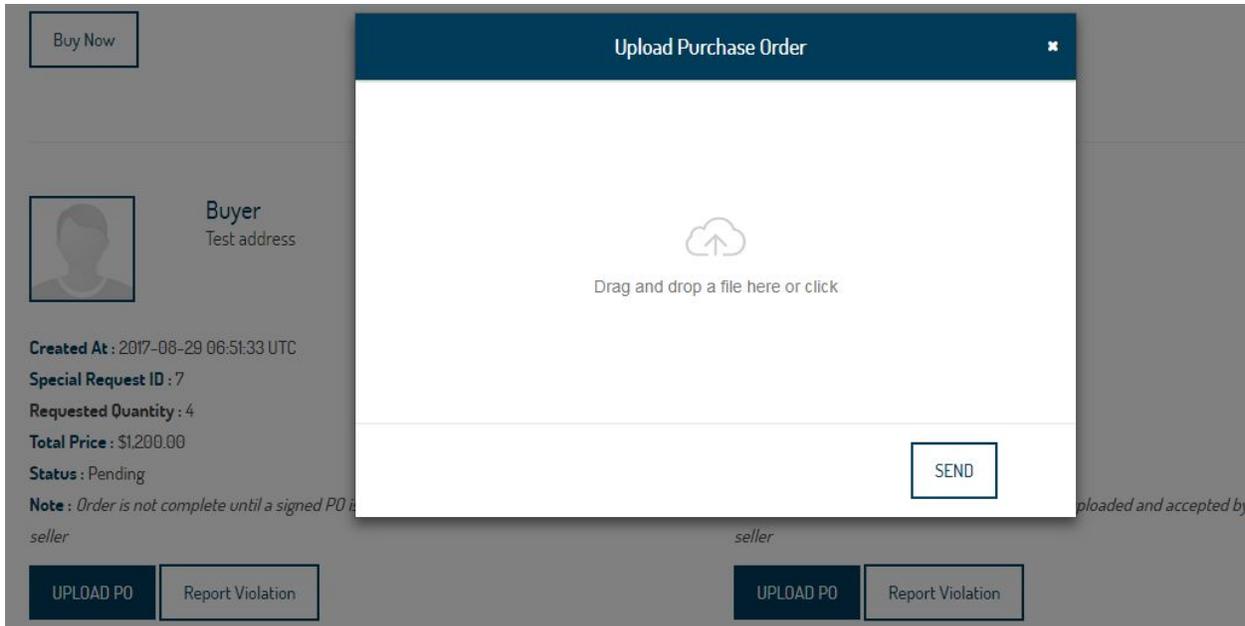
Buyer Dashboard >Inbox Tab: In inbox, the buyer and vendor will receive the messages, and the user can send the reply for particular vendor.



Buyer Dashboard>Specials Functionality : Once the vendor post the specials from his account, buyer will find the special in Find specials tab and after clicking Buy now button the view page will shown like below



As per the above screenshot, the buyer will click the buy now option and the popup will appear to enter the quantity of the product, and click Submit button. After submitting the request, buyer will have the Upload PO Button on his view page.



Once PO is uploaded, the vendor will contact the buyer and make the payment in offline.

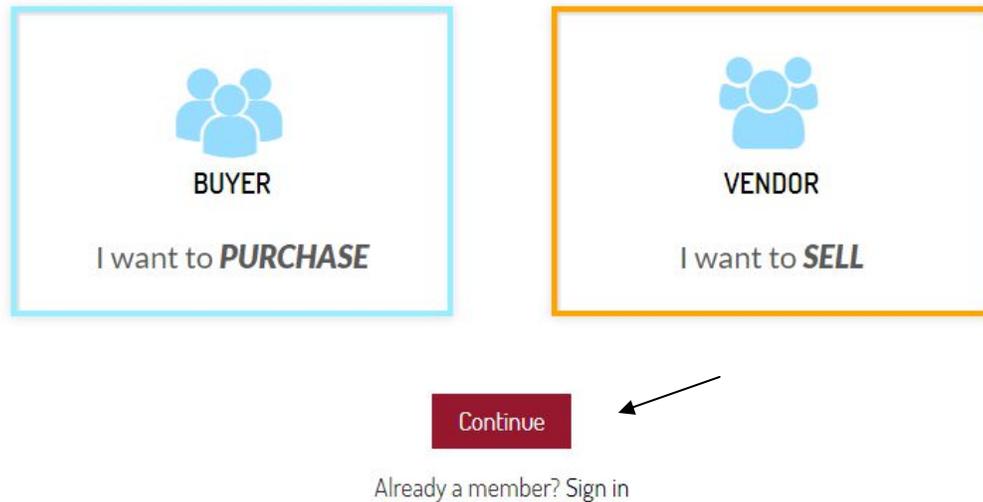
Functionalities and Flow of Vendor

3. **Vendor Sign up:** To become a vendor, user should register with the following mandatory details

- a. Vendor name
- b. Contact name
- c. Title
- d. Telephone
- e. Email
- f. Address
- g. Tax ID
- h. E rate SPIN

To register as a Vendor navigate and click Sign Up button and select the Vendor tab and click on Continue

Create an *Account*



Now after clicking the continue , vendor signup page will display like below.

3. Vendor sign up and admin approve: Once the vendor filled all the details and click join, he will receive an email that the user has been successfully registered and admin needs to approve his application. Once admin approve, he will receive an email and password for the login

<input type="text" value="Vendor Name"/> 	<input type="text" value="Contact Name"/> 
<input type="text" value="Title"/> 	<input type="text" value="Telephone"/> 
<input type="text" value="Email"/> 	<input type="text" value="Address"/> 
<input type="text" value="TAX ID"/> 	<input type="text" value="E-Rate SPIN"/> 

Disclaimer

In order to be eligible to participate in auction process, interested Vendors must formally respond to USETPA RFPs and be awarded a USETPA contract in order to be eligible to participate in auction process. For information on open RFPs, please click [here](#) or contact info@usetpa.com. A USETPA representative will contact you shortly upon completion of registration form.

<input type="button" value="Join"/>	<input type="button" value="Cancel"/>
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3.1 Vendor Sign in and Dashboard page: Once the vendor sign in with the email and password generated by admin, he will be redirected to his dashboard like below

Status

All ▼

Search My Project 🔍

Category

All ▼

Sort by

All Posted ▼



Access points

Project Status: Closed / Category: Networking /

Sub Category : Wireless (Access Points, Routers, and Controllers) /

Child Category : Brocade /

Project Completion/Delivery Date : 08/31/2017 14:30 pm /

Location: Texas

2 Proposals

Closed

3.2 Vendor dashboard > My proposals: In my proposals tab, vendor can able to see his projects in which he sent the request to the buyer and also closed, awarded projects will be shown.

3.3 Vendor dashboard > Bids Lost: In bids lost tab, the vendor will have the projects in which it is declined or not accepted by the buyer for his proposal request

Category

All

Sort by

All Posted



New product

Project Status: Awarded / Vendor: ventwo /
Awarded On: 2017-08-29 / Category: End User Devices /
Sub Category: Servers / Child Category: Brocade /
Project Completion/Delivery Date : 08/30/2017 09:19 am /
Location: Tennessee

1 Proposals

View Project

3.4 Vendor Dashboard > Find Projects: In find projects tab, the vendor will have the projects posted by buyer for submitting his quote based on his needs. The vendor will receive the request only if the particular category is selected and updated from admin

Category

All

Sort by

All Posted



Test

000:07H:22M:45S

Project Status: Opened / Category: End User Devices /
Sub Category: Servers / Child Category: Avaya /
Project Completion/Delivery Date : 08/30/2017 14:30 pm /
Location: Colorado

0 Proposals

Submit Bid

3.5 Vendor > Bid submit functionality: Once the project is shown in the Find projects tab for the vendor, he will look into the project description and send his quote as shown below

Describe Your proposal

Add Attachment



Drag and drop a file here or click

Cost & Timing

Estimated Delivery Date

SUBMIT

By entering the details, quote amount and files attachment, he can successfully submit his proposal and buyer will be notified as Accept or Decline the proposal

3.6 Buyer > Decision matrix table: Once the vendor submits the proposal, the buyer will have the decision matrix table and he can see the performance of all the vendors who send quote based on his quality, past experience etc.,

VENDOR NAME	SELECTION CRITERIA				Overall Ranking
	Price of Products/Services	Product Quality(does solution meet needs)	Geographic Location/Customer Service	References/Past experience with Vendor	
WEIGHT	40	30	15	15	100
VENONE	1	1	1	1	1
	0.4	0.3	0.15	0.15	

Make decision matrix public to all vendors

3.7 Vendor dashboard > After awarded: If the buyer award the vendor for his quote, the vendor will have the option as accept and decline his approval as shown below



venone
test address



Proposals: 2017-08-29 18:13:55 UTC

Bid ID: 15

Bid Details:

fsfsd

Attachments: None

USD \$33.00 / Delivery Date : 31 Aug 2017, 06:30 AM

Accept

Decline

If the vendor accepts the approval, the project workroom will be created for both buyer and vendor and they can share files, leave feedback and complete the project.

My Proposals | Bids Lost | Find Projects | My Account | Specials | Inbox 0 | Welcome, **venone**

Messages

Files

Upload bid acceptance or PO

Proposals

Leave Feedback

Mark as Complete

Dispute

Upload bid acceptance or PO

test

Project Start Date	Amount	Status	Vendor	Project End Date
29 Aug 2017, 06:13 PM	US \$33.00	Awarded	venone	30 Aug 2017, 12:30 PM

Bid acceptance or PO not uploaded Yet!!

3.8Buyer>Upload bid acceptance or PO : Once project is awarded to vendor and after approval, buyer will download and upload the PO and the vendor can see that PO

My Projects | Find Vendors | My Account | Specials | Find Specials | Inbox 0 | Welcome, **Buyer**

Messages

Files

Upload bid acceptance or PO

Proposals

Leave Feedback

Mark as Complete

Dispute

Upload bid acceptance or PO

test

Project Start Date	Amount	Status	Vendor	Project End Date
29 Aug 2017, 06:13 PM	US \$33.00	Awarded	venone	30 Aug 2017, 12:30 PM

[Download bid acceptance or PO](#)
[Upload bid acceptance or PO](#)

3.9Vendor>Bid acceptance or PO: After buyer upload the PO from his side, the vendor will receive the following uploaded PO

My Proposals | Bids Lost | Find Projects | My Account | Specials | Inbox 0 | Welcome, **venone**

Messages

Files

Upload bid acceptance or PO

Proposals

Leave Feedback

Mark as Complete

Dispute

Upload bid acceptance or PO

test

Project Start Date	Amount	Status	Vendor	Project End Date
29 Aug 2017, 06:13 PM	US \$33.00	Awarded	venone	30 Aug 2017, 12:30 PM

View Bid accept form or PO

3.10 Buyer and Vendor Workroom: After approval, buyer and vendor both will be able to communicate by sharing files, dispute, and only buyer can make the project as complete.

3.11 Vendor>Specials: In specials tab, vendor can able to post the special for the buyer for buy now option by filling the below fields

My Proposals Bids Lost Find Projects My Account Specials Inbox 0

Status
All Search My Project

Category
All Sort by
All Posted

NO PREVIEW AVAILABLE

Product
Special Status: Closed / Category: End User Devices /
Sub Category: Printers / Available Quantity: 99 / Price: US \$100.00
1 Requests Closed

By filling the below fields, the user can able to post a special.

Special Title *	Special Category
<input type="text" value="Special title"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="Special category"/>
Special Description (Optional)	
<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	
Price *	Available Quantity *
<input type="text" value="Special price"/>	<input type="text" value="Special Quantity"/>
Attach Files	+ Add More

