Sourcing Intelligence® Quick Start

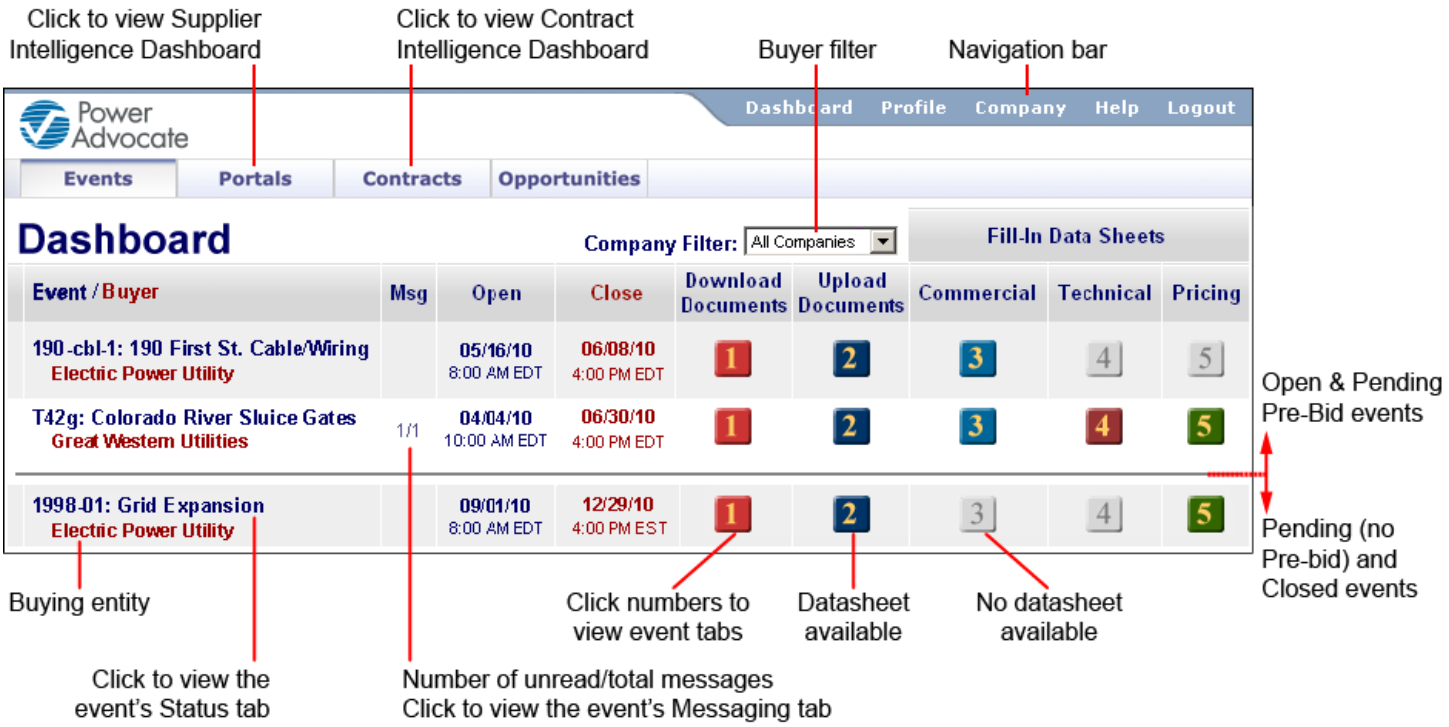
PowerAdvocate Sourcing Intelligence enables suppliers to access buyer documents and submit documents over a web-based sourcing platform.

Logging In

1. Launch a web browser and go to www.poweradvocate.com.
2. Click the orange **Login** button.
3. Enter your account **User Name** and **Password** (both are case-sensitive) and click **Login**.
4. Click the **Events** tab if it is not already displayed.

Dashboard

Your Dashboard lists the events you have been invited to. A line divides currently accessible events from others.



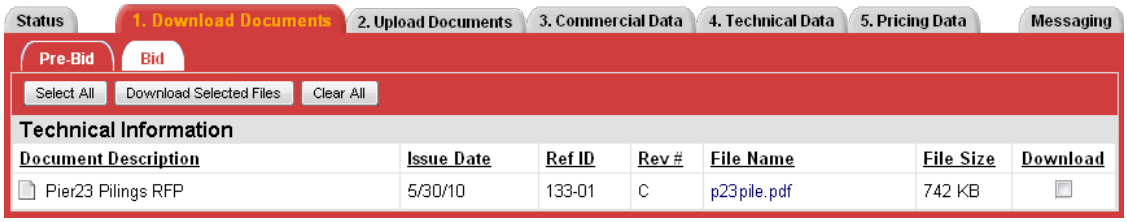
- Click an event name to view its **Status** tab, which displays a summary of the event activity and key dates. To view specific details of an event, click the buttons 1 2 3 4 5 to view the corresponding tab.
- To return to the Dashboard, click **Dashboard** in the navigation bar at the top of the window.
- An event will not appear on your Dashboard until the Bid Event Coordinator has added you as a participant.

In addition to the Events tab, you may also see:

- An **Opportunities** tab, if a buyer opens an event to all PowerAdvocate suppliers; you can review a high-level event description, and may request full access to the event.
- A **Portals** tab, if a buyer subscribes to PowerAdvocate Supplier Intelligence
- A **Contracts** tab, if a buyer subscribes to PowerAdvocate Contract Intelligence.

Downloading Bid Packages

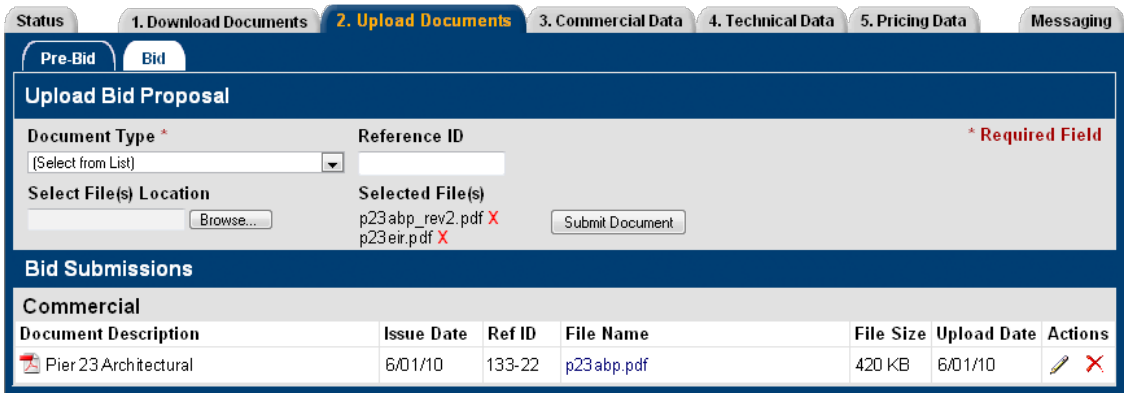
All of the buyer's bid package documents, including specifications and engineering drawings, are centrally stored on the PowerAdvocate platform. To view bid documents, click 1 on your Dashboard or on the **1. Download Documents** tab from within the event.



- You can access the **Bid** sub-tab after the bid opens. You can access Buyer documents before the event from a **Pre-Bid** sub-tab if the buyer requires a Pre-Bid submittal; the buyer must approve your submittal before you can access the **Bid** sub-tab. Likewise, you will see a **Post Bid** sub-tab if the buyer invites you to participate in post-bid negotiations.
- To view or download a document, click the file name; you may be prompted to open or save the file.
- To download multiple documents:
  1. Select the checkbox in the **Download** column for each document you wish to download, or click **Select All**.
  2. Click **Download Selected Files**.
  3. Click **Start** to download a .zip file containing the selected documents.

Uploading Documents

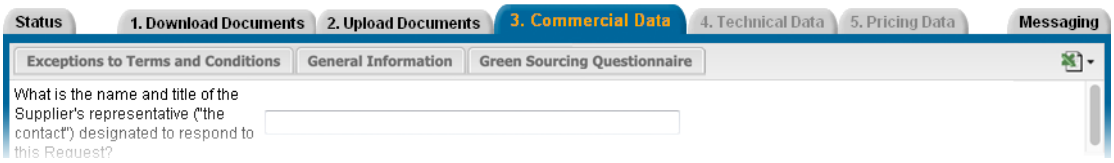
To upload your documents, click 2 on your Dashboard, or on the **2. Upload Documents** tab from within the event.



- As with the **1. Download Documents** tab, you may be able to access and upload documents to **Pre-Bid**, **Bid**, and **Post Bid** sub-tabs as appropriate.
- To upload a document:
  1. Specify a **Document Type**, and edit the Reference ID if necessary.
  2. Click **Browse**, navigate to and select the document, and then click **Open**; multiple files can also be compressed into one .zip file for upload.
  3. Click **Submit Document**.
- Late documents are accepted at the Buyer's option, but are flagged in red text.

Completing Datasheets

To view the event datasheets, click 3 4 5 on your Dashboard or on the **3. Commercial**, **4. Technical**, or **5. Pricing** tabs from within the event. Buttons/tabs are grayed out (e.g., 3) if the buyer did not create a particular type of datasheet.



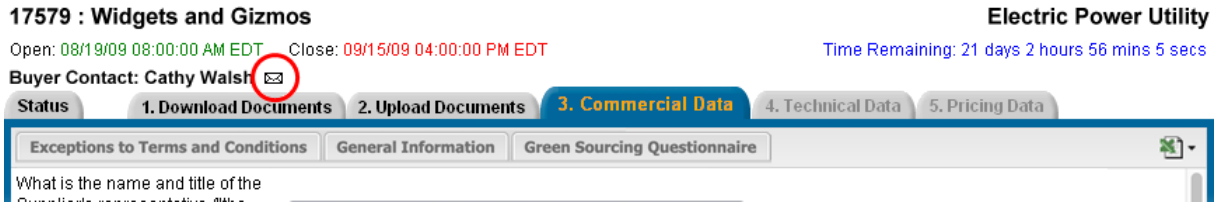
- Complete the datasheets over the course of the Bid Open period; datasheets may have multiple sub-tabs.
- Click **Save Data** often to avoid data loss. Once the bid closes, saved data is automatically submitted to the buyer.
- Once the bid closes, you are normally unable to modify datasheets. However, at the buyer's option, you may upload additional documents on the **2. Upload Documents** tab (which are flagged as being late).
- To export the datasheets to an Excel workbook, click .

Communicating with the Bid Event Coordinator

Buyer companies use one of two communication options in Sourcing Intelligence: Email or PowerAdvocate Messaging.

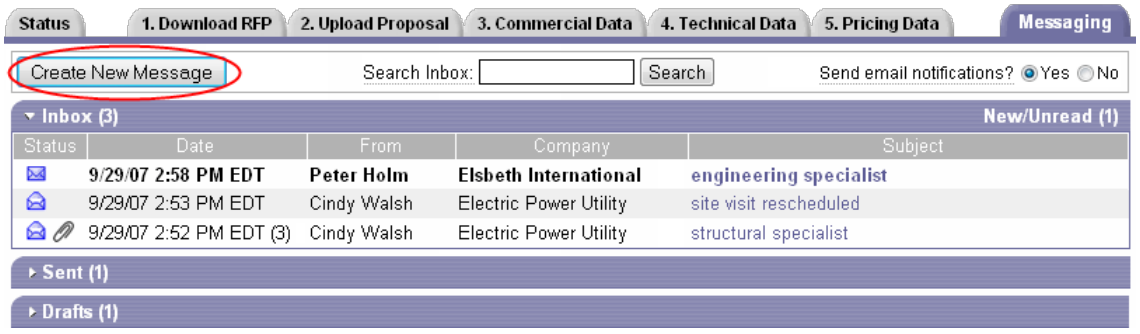
Email

Click the ✉ icon next to the Buyer Contact's name to contact them through your default email application (e.g., Outlook).



PowerAdvocate Messaging

To send a message to the Bid Event Coordinator (BEC), go to the **Messaging** tab and click **Create New Message**. To read or reply to a message from the BEC, click the message subject.



- You can send messages to the BEC and Buyer Team; replies are sent your Supplier Team and the Buyer Team.
- BECs can message the Buyer Team and all Supplier Teams at once; Supplier Teams can respond but not see other Supplier Teams' responses.
- Supplier Teams cannot message each other, or see other Supplier Teams' correspondence with the Buyer Team.
- You can receive external email notification of new PowerAdvocate messages.

Getting More Information

- Click **Help** on the navigation bar to display the online help.

- Supplier documentation can be downloaded from the online help system.
- Call PowerAdvocate support at 857-453-5800 (Mon-Fri, 8 a.m. to 8 p.m. Eastern Time) or email support@poweradvocate.com.

August 2019

PowerAdvocate
179 Lincoln Street
Boston, MA 02111 USA

Support: 857.453.5800
Fax: 857.453.5656
Email: support@poweradvocate.com