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**S R M**

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EPROCUREMENT

# **BUYER GUIDE**



# Content

## Key Processes:

- ◆ Create a user account
- ◆ Add Business Details
- ◆ Your Dashboard
- ◆ Create bid online
- ◆ Publish your bid





# Create User Account

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Welcome, Let's get you started

Full Name	Email Address
Fullname	Franklin Njeru
Phone number	
Phone number	
Password	Confirm Password
.....	Confirm password
<input type="checkbox"/> I Agree the <a href="#">terms and conditions.</a>	
<a href="#">I have account, take me to login</a>	<a href="#">Create Account</a>

The user whether a buyer or a supplier will create secure credentials for interacting with SRM including:

Create user profile

Add contact information

Set user password

Accept terms

# Add Business Information

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The user is prompted to create business details including logo, products categories, Business contacts info

## Tell us about your business

Business Name:

Easy SRM

VatNumber:

0000

Physical Address:

Nairobi Road, NBI House, First floor

Postal Address:

PO Box 0000 - 0000 Nairobi

Country:

Kenya

Phone number:

0722123456

Email:

supplier3@srmhub.com

Save Changes & Continue

# Dashboard - Confirm Email

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The User needs to confirm email by clicking on link sent to their account.  
User can also request SRM team to verify their business and documents

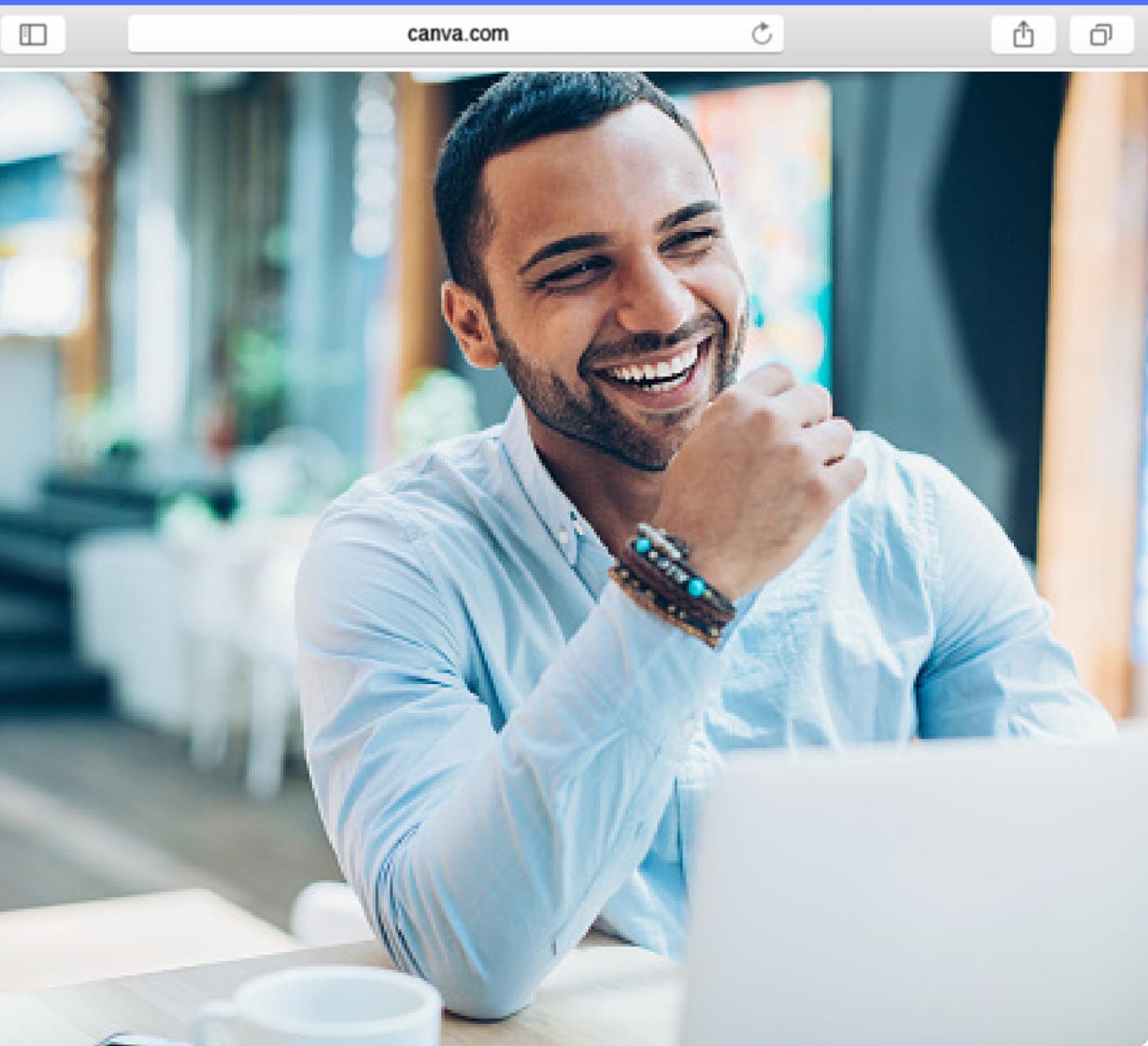
## Confirm Your email

We sent a confirmation link to [supplier3@srmhub.com](mailto:supplier3@srmhub.com), [Change Email](#) or [Resend Link](#)

## Verify your account

Buyer-supplier verification

Request Verification



# Givers gain!

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**Once you are in SRM community, you gain business by participating in bids.**

**You too can save time and money down by publishing and processing bids via SRM's large network of suppliers**

- Dashboard
- SUPPLIER
  - My Applications
  - Make Applications
- BUYER
  - Publish Tender
  - View My Tenders
  - Tender Category
- SETTINGS
  - Business >

# Your Dashboard

## My Applications :

Lists all draft and submitted applications

## Make Applications :

Supplier views all open RFX and can participate

## Publish Tender:

Buyer can create a tender, quotation or prequalification

## View my tenders :

Buyer can review all tenders they have created in SRM

## Tender Category

Buyer can review all product categories for his business

# Request Verification

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The User can request SRM team to verify documents uploaded in SRM. This labels supplier /buyer as VERIFIED and can access RFX marked for [Verified Accounts Only](#)

## Request Account Verification

### Required documents for verification

Name	Description	File	
Business Permit	Statutory	(Not uploaded)	<a href="#">Upload</a>
Business Registration Certificate	Statutory	(Not uploaded)	<a href="#">Upload</a>
CVs or Resume	Employees	(Not uploaded)	<a href="#">Upload</a>
AGPO Certificate	Statutory	(Not uploaded)	<a href="#">Upload</a>
Audited Financial Reports	Business documents	(Not uploaded)	<a href="#">Upload</a>
Bankers Letter	Business documents	(Not uploaded)	<a href="#">Upload</a>
Certificates of Good Conduct	Employees	(Not uploaded)	<a href="#">Upload</a>



**Work from  
anywhere,  
anytime**

# Create Tender Project

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## Project Detail Setup

Tender ref:

SRM2021-2023

Name:

Provision of Guarding Security Services

Closing date:

29/11/2021

Closing time:

15:34

Description:

Provision of Guarding Security Services

Behaviour:

Blind

Supplier access:

Open to all

Create bid details that will assist in managing your project including bid name, reference, deadline date and time

Behaviour can be sealed, open or blind

Access can be open to all or invite your own vendors

# Create Tender Project

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Behaviour:

Blind

Supplier access:

Open to all

Event currency:

Kes

Fee per category:

2500

Instructions:

Review vendor guide provided

Save Changes

If you the suppliers are going to pay a tender fee, it is included at this stage including how to pay and currency

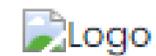
Detailed instructions can be provided via documents provided to suppliers to download and review. Other documents are to stamp and sign then upload

# Create Bid Stages

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Project Advanced setting

Publish



## SRM2021-2023 - Provision of Guarding Security Services

Easy SRM **Request Verification**

Due Date

Status

NOV. 29, 2021 3:34 P.M.

DRAFT

Overview

Categories (0)

Tender Envelopes (0)

Supporting Documents (0)

Attachments (0)

Provision of Guarding Security Services in SRM offices

Supplier Access

Open to all

Behaviour

Blind

Fee Per category

Kes 2500.0

### Supplier Instructions

Review vendor guide provided for more details

This dashboard guides on the steps to create a bid.

i.e

- Supplier categories
- Create questionnaires
- Ask for documents
- Provide guiding documents

# Create Categories

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You choose a supplier category from your existing list or create a new one relevant to the bid

Overview

Categories (0)

Tender Envelopes (0)

Supporting Documents (0)

Attachments (0)

Add category

#	Code	Name
<input type="checkbox"/>	SRM/098	Provision of Guarding Security Services

Save

# Select envelopes

Select envelopes to use based on information you need to gather from suppliers. Under each envelop, you will create sections and questions

### What type of Project do you want to publish

Check applicable

Envelope	About	Setup
<input checked="" type="checkbox"/> Prequalification <input type="checkbox"/> Enforce reverse auction	New supplier registration	<a href="#">Manage Questions</a>
<input checked="" type="checkbox"/> Request for Quotation <input type="checkbox"/> Enforce reverse auction	Ask suppliers to submit quotation	<a href="#">Manage Questions</a>
<input checked="" type="checkbox"/> Technical envelope	Ask technical questions concerning a particular issue	<a href="#">Manage Questions</a>

[Save](#)

# Create Sections

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Each envelope will have sections (e.g General, Experience, CBQ) and then questions

## Prequalification Envelope

[← Back to project setup](#)

### Sections

Create your first section e.g CBQ - Confidential Questionnaire

Add Section

## No section selected yet

Select section from left or create new one to add questions

Add your First Section

# Create Questions

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## Questionnaire

Question Description \*

Does your company pay taxes to National Government

Hint or help text

Add extra information to help supplier

Make mandatory

Response Type \*

Single select

Add at least 2 options

Yes

No

Add Another Option

Min Score

Max Score

How to score this question

Save Question

Ask supplier questions aimed at earning them a score or gathering requisite information

Response format for questions should be either numeric, text, single select, multiple select or date

# Add Products to financial envelope

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## Add Product

Product item description

Unit of measurement

Quantity

Mandatory or Optional

Optional

Save Changes

The buyer creates:

- Product name
- Unit of measure e.g Ton, Kg, Pax, lot
- Quantity required
- Whether it is a mandatory product
- Tax rate column

# Financial Envelope - Product Table

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The buyer can preview product table once created and edit items

Add Product

#	Item	Units	Quantity	Option	
1	Guards	Pax	4.0	Optional	<a href="#">Edit</a> 
2	Supervisor	Pax	1.0	Optional	<a href="#">Edit</a> 
3	Alarm response	units	1.0	Optional	<a href="#">Edit</a> 

# Request Documents

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## Request supporting documents

Select Document

Business Permit - Statutory

Max Files Upload

1

Scoring Mode

Pass or Fail

Full Mark

Legs Distributed

What to check for

Expiry date, name of company

The buyer selects the following:

- Document name
- How many files a supplier can upload - e.g 4 CVs, 1 trade licence
- Will the document be scored
- How document will be scored
- Information evaluation team will look for

# Documents Scores

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Add Document

Name	Score Mode	Marks	Criteria	Max Files	
<b>1 Business documents</b>					
1. Bankers Letter	FULL_MARK	5	Letter signed by a bank	1	<a href="#">Edit</a>
<b>2 Employees</b>					
1. CVs or Resume	DISTRIBUTED	<a href="#">+ Add Distribution</a>	CVs expeience and qualification	3	<a href="#">Edit</a>
		1 CV - 1 marks <input type="checkbox"/>			
		2CV - 3 marks <input type="checkbox"/>			
		3CV - 5 marks <input type="checkbox"/>			
<b>3 Statutory</b>					
1. Business Permit	PASS_OR_FAIL		Expiry date, name of company	1	<a href="#">Edit</a>

The buyer allocates marks for each document.  
For districuted marks, they create a criteria for awarding

# Provide Documents

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The buyer provides documents to guide supplier i.e scoring matrix, instructions, templates to sign like self declaration, form of tender and acceptance letter.

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Upload Attachment to supplier

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Upload

Name of attachment

Select PDF File

Choose file No file chosen

# Download and Review Bid

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## E-TENDER APPLICATION - PRINT OUT

Interest Expressed on [www.srmhub.com](http://www.srmhub.com) at Nov. 29, 2021, 2:28 p.m. by Supplier

Date: 29th November 2021 14:45

### 1. GENERAL TENDER DETAILS

Project Name/ID	Provision of Guarding Security Services
Current Status	<b>Running</b>
Publish Date	Nov. 29, 2021
Closing Date	<b>Nov. 29, 2021 at 3:34 p.m.</b>
Supplier Access	Open to all
Behaviour	Blind
Behaviour	Blind

The buyer can download and review detailed set up before, submit for approval publishing.

SRM too reviews all bids before releasing them to public or invited suppliers.

**Publish  
your  
bid.**

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# Contact Us

We'd love to talk about all things procurement automation

## Phone Number

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## Email Address

admin@srmhub.com

## Website

[www.srmhub.com](http://www.srmhub.com)