



Register Guide

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Index

1 - What is efasst?.....	3
2 - Interface Features	4
3 - How do I access to efasst?	5
4 - How do I register on efasst?.....	6
4.1 - Pre-Registration	7
4.1.1 - Creating a User Name	7
4.1.2 - Completing the Pre-Registration Forms	8
4.2 - Sending the Validation Document	12
4.3 - Authentication of the “Validation Document”	14
4.4 - Second Phase of Registration.....	14
5 - Portfolio	15
5.1 - Update Data Registration (for Current Suppliers)	15
6 - Communicator	16

1 - What is efasst?

efasst is a software application that upholds the policy of Supplier Relationship Management (SRM) of the Efacec Group and is the preferred communication channel between the company and its supplier partners.

The goal of efasst is to streamline the processes of procurement, negotiation and purchase in order to develop and enhance strategic alliances between the various companies of the Efacec Group and its various supplier partners.

As a global enterprise application, efasst incorporates a set of features, the most notable of which is its multilingual capability, whose goal is to adjust to the different standards of each country.

Currently, efasst allows you to register in our database of potential suppliers, with other features being developed to be available soon.

NOTE

The use of efasst should be performed entirely in a web browser. We recommend using Internet Explorer 7.0, or a later version, at a resolution of 1024 * 768.

2 - Interface Features

The screenshot displays the efasst Pre-registration interface at Step 2.3, titled "Supply Scope". At the top, there is a header with the efasst logo, a welcome message "Welcome, Test Company", language options (Português, Español, English, Français), and links for Help, FAQ's, Contacts, and Logout. A progress bar indicates the current step (Step 2.3) and shows steps 1 through 10, with a note "10 * Required fields". The main content area asks "Which are the geographical areas where you wish to supply?" and lists three options: "Geography total", "America", "Asia and Pacific", and "Europe, Middle East and Africa". A search bar is located on the right. At the bottom, there are navigation arrows for "Step 2.2" and "Step 2.4", and a "Save" button. Numbered callouts 1 through 10 point to various interface elements: 1 points to the language bar, 2 to the Help/FAQ's/Contacts/Logout links, 3 to the progress bar, 4 to the "Supply Scope" title, 5 to the "Step 2.2" navigation arrow, 6 to the "Save" button, 7 to the "Select All" link, 8 to the "Clear selection" link, 9 to the search bar, and 10 to the "Required fields" note.

Fig. 1 - Example of registration in efasst

efasst has the following features in its interface:

1. **Multilingual Bar** - Here, you can select the desired language to be used throughout the application.
2. **Help Bar** - Through the links “**Help**” and “**FAQ’s**,” you can find answers to questions that may surface while using efasst. This is also where a user can consult this document. If questions are still unanswered, the contacts support for efasst can be found through “**Contacts**”.
3. **Exit** - You may exit efasst whenever it is desired via the “**Exit**” link, found in the upper right-hand corner of the window. Don’t forget to save your current work.
4. **Progress Bar** - The progress bar displays your current stage in the Pre-registration process, enabling you to view both completed steps and upcoming required steps to be fulfilled to complete the Pre-Registration process.
5. **Navigation Arrows** - Use the ➡ and ⬅ to navigate around the registration process.
6. **Save** - Use the 💾 button if you wish to save the entered information and to exit the application.
7. **“All Options” Button** - Allows you to select all available options in the form.
8. **“Clear Selection” Button** - Allows you to undo the previous selection.

9. **Search** – Allows you to search for a particular term in the form.

10. **Mandatory Information** – The symbol * indicates that the field is required in order to proceed with the registration process.

3 - How do I access to efasst?

Access to efasst may be done in two ways:

1. Directly via the link: <http://efalink.efacec.com/efasst>.

efacec

Site Map FAQ's

PT | EN | FR | ES

Welcome to Portal EFASST

Private Area

User:

Password:

Login

Forgot password?

Pre-Registration

1. The first step of the Pre-Registration process is the **Creation of the User Account**. Please fill out the required forms in the Secure Domain of this website.
2. After completing the pre-registration process, the Validation document must be sent, stamped and signed by a legal representative of the company.
3. After sending the Document of Validation, EFACEC will proceed with its authentication.
4. In the event of interest on the part of EFACEC, you will be asked to complete a second phase of registration, which is mandatory for the issuing of Purchase Orders.
5. For more detailed information, click [here](#) or contact us.

Start Pre-Registration

(+351) 22 956 29 10

efasst.support@efacec.com

Fig. 2 - Efacec Supplier Portal

2. Through the official Efacec website, on the “Suppliers” domain

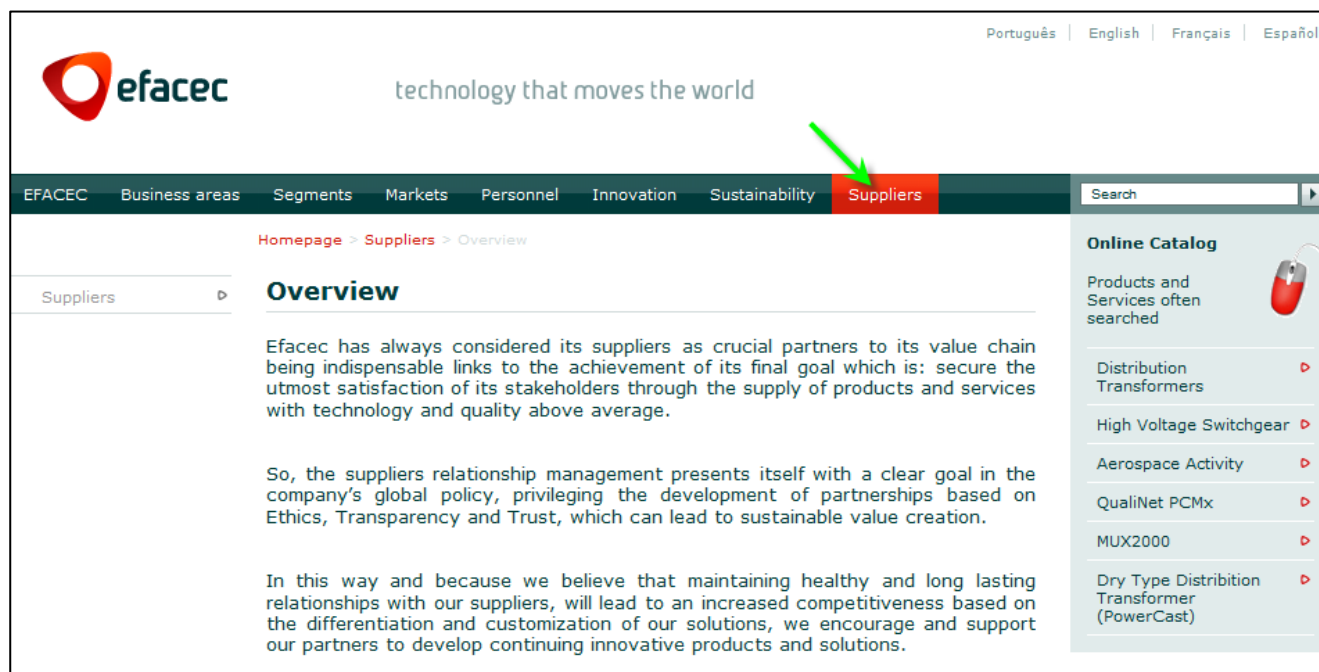


Fig. 3 - Official Efacec Website (Suppliers Domain)

4 - How do I register on efasst?

In order to register on efasst, you must complete the following steps:

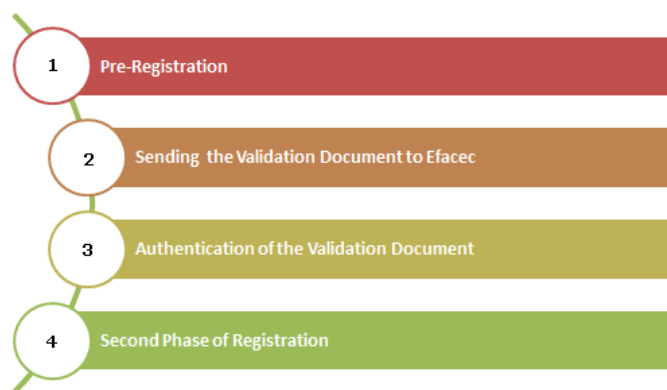


Fig. 4 - Steps to register on efasst

Completing all of the above mentioned steps to register on efasst do not imply any contractual relationship with Efacec, and therefore does not confer any exclusive right to consultations, negotiations or awards.

4.1 - Pre-Registration

Pre-registration involves two steps:

1. Creating a User Name
2. Completing pre-registration forms

4.1.1 - Creating a User Name

The first step in the pre-registration process is the creation of a User Name, and a Password, to access efasst. To do this, click **“Start Pre-Registration”** (1) on the Efacec Supplier Portal, as shown in the figure below.



Fig. 5 - Beginning of the pre-registration process

Upon clicking **“Start Pre-Registration”** the following screen appears:

The image shows a screenshot of the 'Register New User' form in the efasst system. The form is titled 'efasst Strategic Sourcing Tools' and 'efacec'. It has a heading 'Register New User' with a red circle icon. Below the heading are five input fields: 'User *', 'E-mail *', 'Legal Company Name *', 'Country *', and 'Taxpayer Identification Number *'. The 'User' and 'Taxpayer Identification Number' fields have small icons (BP and PT respectively) to their left. Below the fields is a red asterisk icon with the text '* Required Fields'. At the bottom right of the form is a red button labeled 'Registrar'.

Fig. 6 - Creating a User Name

Upon submitting the information, you will be notified via e-mail, which will include your User Name and Password to access the Secure Domain of efasst.

4.1.2 - Completing the Pre-Registration Forms

After the creation of the User Name, you may continue with the Pre-registration process. To do this, you must perform the following actions (as shown in the figure below):

1. Access the efasst website (link: <http://efalink.efacec.com/efasst>)
2. Enter your User Name and Password in the Secure Domain of efasst
3. Click “Enter”



Fig. 7 - Accessing the Secure Domain of efasst

NOTE:

The field “User” is not case sensitive. However, this is not the case for the Password, so please exercise care in entering it correctly. If your credentials are entered incorrectly, an error message will appear and you will have to try again.

If you have forgotten your password, you may retrieve it via the “**Forgot Password**” link (see Fig. 7), filling in all the required information.

After authentication of your User name in the Secure Domain, please complete the available forms:

1. General Company Information;
2. Information on the Scope of Supply;
3. General Information on Quality, Environment and Safety;
4. Information on the Main Contacts with Efacec (see example below).

For a better understanding of how pre-registration data should be completed it is presented the following example:

Example of completing Pre-registration for efasc:

“I wish to register a company that specializes in the installation and maintenance of air conditioning systems, whose market is Switzerland and I intend to supply to all areas of Efacec.”

In this example, the user should:

1. Fill out the General Company Information form (which should include information on the Identification of your company, General Contacts and Address).
2. Indicate the position(s) in which it is located in the supply chain.

The screenshot shows the 'Pre-registration - Step 2.1' form. The 'Supply Scope' section asks the user to indicate their predominant position in the supply chain as a provider. The options are: Manufacturer, Systems supplier/Integrator, Subcontractor, Installer, Service provider, Distributor, and Retailer. The 'Installer' and 'Distributor' options are highlighted in green and have their checkboxes checked. The 'Required fields' label is present in the top right. Navigation buttons for 'Step 1', 'Step 2.2', and 'Save' are at the bottom.

Position	Selected
Manufacturer	☐
Systems supplier/Integrator	☐
Subcontractor	☒
Installer	☒
Service provider	☐
Distributor	☒
Retailer	☐

This is selected because the user is an installer and makes the project of air conditioning systems (manufactured by other companies)

Fig. 8 - Supply Chain Position (Example)

3. Indicate what products with which you want to supply Efacec.

The screenshot shows the 'Pre-registration - Step 2.2' form. The 'Supply Scope' section asks the user to indicate what they wish to supply Efacec Companies. The product selection is shown in a tree view under 'Total Corp.Purch.Item Groups'. The 'Systems' category is expanded, and the 'Air Treatment Systems' category is highlighted in yellow. Within 'Air Treatment Systems', the 'HVAC Syst.' category is expanded, and the 'Air Conditioning Syst.' and 'Air Conditioning Syst.' sub-items are highlighted in green and checked. The 'Required fields' label is present in the top right. Navigation buttons for 'Step 2.1', 'Step 2.3', and 'Save' are at the bottom.

Category	Sub-category	Item	Selected	
Total Corp.Purch.Item Groups	Goods	Automation and Control Syst.	☐	
		Communication Syst.	☐	
		Power Supply Syst.	☐	
	Logistics Systems		☐	
Air Treatment Systems	HVAC Syst.	Ventilation Syst.	☐	
		Heating Syst.	☐	
		Air Conditioning Syst.	☒	
		Air Conditioning Syst.	☒	
	Deodorizing Syst.		☐	
	Hospital Systems		☐	
	Safety Systems		☐	

These are selected because one of the user's marketing activities is that of Air Conditioning systems (turnkey project)

Fig. 9 - With what do you want to supply Efacec? (Example)

Pre-registration - Step 2.2 Step 2.2

Supply Scope * Required fields

What do you wish to supply Efaced Companies? *

Search

- Services 1
 - Utilities
 - Insurances
 - Travel and Accommodation
 - Spec. Scient./Tech. Serv.
 - Temporary Labor
 - Equipment Rental
 - Transportation Services
 - Repair and Maint. Serv.
 - Build./Infrastr. Maint. Serv.
 - Equipment Maint. and Rep.
 - Maint. & Rep. of Electric. Eq.
 - Maint. and Rep. Electronic Eq.
 - Maint. and Rep. Electromec Eq.
 - Maint. and Rep. Mech./Hydr Eq.
 - Maint. and Rep. of HVAC Eq. 2
 - Maint. and Rep. of Heating Eq.
 - Maint. and Rep. of Air Cond Eq. 3
 - M. & R. of Indust. Ventil. Eq.
 - Maint. and Rep. of Hospital Eq.
 - Maint. Rep. of Hand Load. Eq.
 - Man. and Rep. of Other Eq.

Clear selection

Step 2.1 Step 2.3

Save

(These are selected because the user performs maintenance and repair on Air Conditioning systems)

Fig. 10 - With what do you want to supply Efaced 2? (Example)

4. Indicate to which countries you can provide.

Pre-registration - Step 2.3 Step 2.3

Supply Scope * Required fields

Which are the geographical areas where you wish to supply? *

Search

- Geography total
 - America
 - Asia and Pacific
 - Europe, Middle East and Africa 1
 - Africa
 - Europe 2
 - Åland Islands
 - Albania
 - Andorra
 - Armenia
 - Austria
 - Belgium
 - Bulgaria
 - Bosnia and Herzegovina
 - Switzerland 3
 - Cyprus
 - Czech Republic
 - Germany
 - Denmark
 - Spain
 - Estonia
 - Finland

Select All | Clear selection

Step 2.2 Step 2.4

Save

(This is selected because the user's main market is Switzerland)

Fig. 11 - In which geographical areas do you want to provide? (Example)

5. Indicate for which market segments you can provide.

Pre-registration - Step 2.4 Step 2.4

Supply Scope

Which are the market segments your products / services are intended for? *

Search

- Market segments total
 - Agriculture and Fishing
 - Electric Power
 - Power-Production
 - Power-Hydroelectric Plant
 - Power-Thermoelectric Plant
 - Power-Fossil Fuel Elect Plant
 - Power-Gas Fuel Electric Plant
 - Power-Geothermal Elect Plant
 - Power-Cogeneration Elect Plant
 - Power-Nuclear Electric Plant
 - Power-Renewable/New Tech Plant
 - Power-Other Types of Plants
 - Power-Transmission/Distribut.
 - Natural Gas
 - Environment
 - Industry
 - Construction
 - Transport
 - Telecommunications
 - Services
 - Trade

Select All | Clear selection

Step 2.3 Step 2.5

Save

(These are selected because the company designs and installs specific systems for the market segment of thermal power stations, excluding Nuclear Power Plants)

Fig. 12 - For which market segments are their products/services intended? (Example)

6. Indicate for which Efacec Business Units you want to provide.

Pre-registration - Step 2.5 Step 2.5

Supply Scope

Which Efacec areas do you wish to supply?

Search

- Business organization total
 - EFACEC
 - Engineering Services Solutions
 - Environment
 - Air Conditioned
 - Water
 - Dedusting
 - Solid Waste
 - Automation
 - Energy Systems Automation
 - Engineering
 - Energy Production
 - Substations
 - Maintenance
 - Energy Maintenance
 - Hospitals Maintenance
 - Industrial Maintenance
 - Roads Maintenance

Select All | Clear selection

Step 2.4 Step 2.6

Save

(These are selected because the company intends to provide for all Business Areas of Efacec)

Fig. 13 - For what areas of Efacec do you want to provide? (Example)

7. Indicate Associated Companies, if there are any companies in your group that are already providing goods and/or services to Efacec. You may also indicate any Clients of reference and include attachments in permissible formats (e.g. catalogs, corporate presentation, etc.).

Step 2.6

Pre-registration - Step 2.6

Supply Scope

Do you have any affiliated company already registered as Efaced supplier?

Country	Legal Company Name	Taxpayer identification number	!
Portugal	Test Company 2		
			+

If there are any companies in your group that are already providing goods and/or services to EFACETEC, you must fill: Country; Legal Company Name and Taxpayer identification number (if applicable to the selected country)

Please indicate some of your Client references

References

Client 1

Client 2

Client 3

You may also indicate any Clients of reference

Attachment

Description	File	[?]	Browse...	Upload
Catalog + Corporate Presentation +				

You may include any attachments in permissible formats

← Step 2.5
Step 3 →

8. Fill in general information on Quality, Environment and Security (it is recommended that you attach all relevant certificates that you possess).
9. Indicate the Main Contact (as well as Alternatives Contacts) of your company with the areas of Purchasing and Procurement of Efacec.
10. Finalize the Pre-registration by accepting the Terms of Use.

After filling out this information, you may always view and revise it through the “**Portfolio**” link (See section 5).

4.2 - Sending the Validation Document

Upon completion of the Pre-Registration, a model of a Validation Document containing the collected information will be created and made available on efasst.

1. From the efasst agenda, click on “Insert Validation Document”

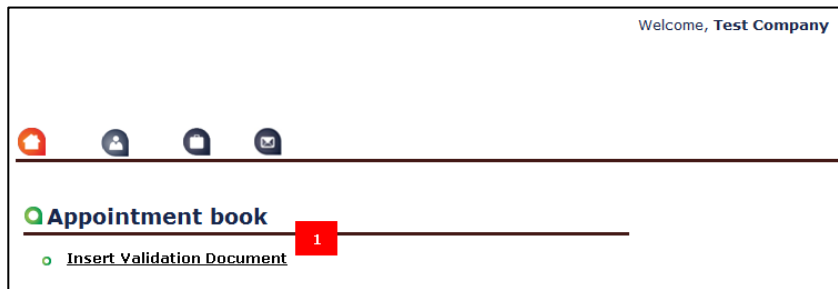


Fig. 15 - Insert Validation Document”

2. Open and download the Validation Document Template.

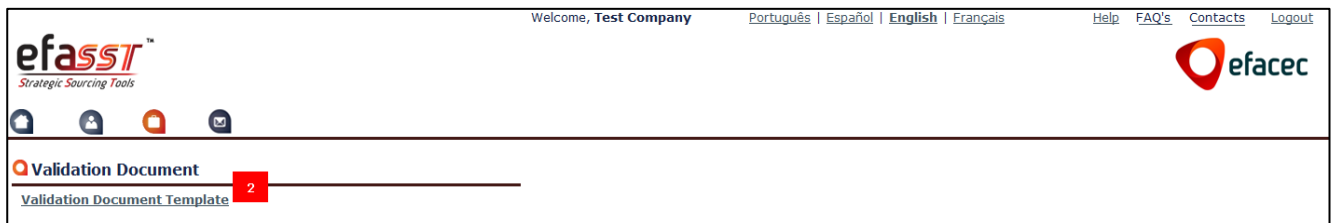


Fig. 16 - Link to “Validation Document Template”

At this stage, please download the Validation Document Template that you will later send to Efacec, stamped and signed by a legal representative of the company.

The Validation Document may be sent to Efacec via mail, fax or in an e-mail to Contacts listed on the document.

It can also be uploaded on efasst following these steps:

1. Access to “Validation Document” Domain

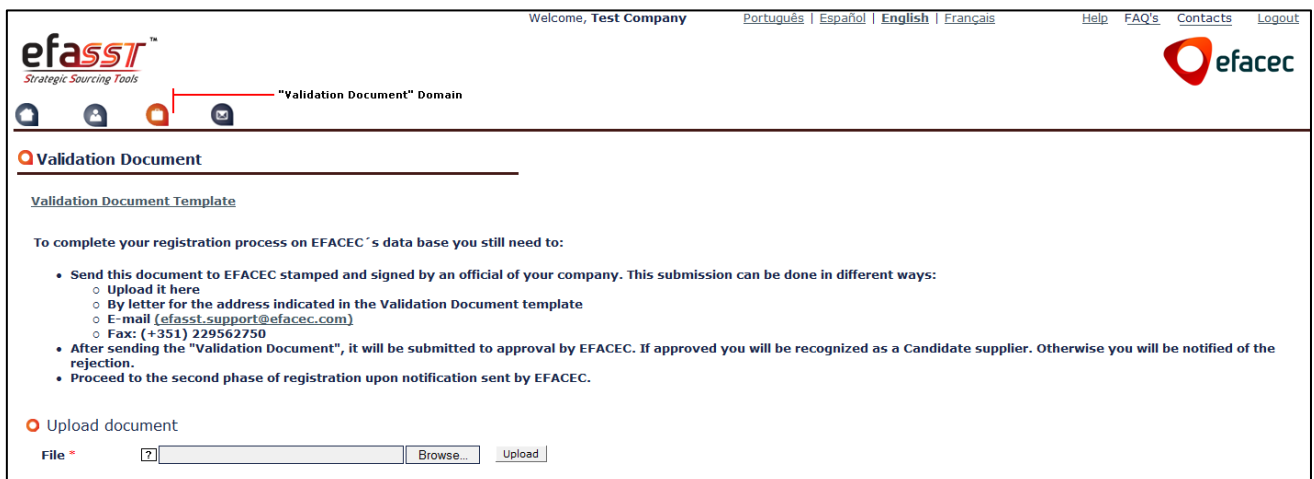


Fig. 17 - “Validation Document” Domain

2. Browse and upload the document on the following area

File *

1 2

Fig. 18 - File Upload

4.3 - Authentication of the “Validation Document”

After the Validation Document has been received, Efacec will proceed to its authentication. If the document is in accordance with the requirements, your status in our database of potential suppliers will be changed.

4.4 - Second Phase of Registration

If there is interest from Efacec, you will be prompted to complete the second phase of registration. This phase is required for the issuing of Purchase Orders and to gather specific and private information of your company.

In the Second Phase of Registration, you will be asked to fill out:

1. Specific Information of Supply
2. Financial data
3. A more detailed questionnaire regarding Quality, Environment and Safety

efasST™ Strategic Sourcing Tools

Welcome, Test Company

Português | Español | English | Français

Help | FAQ's | Contacts | Logout

2nd Phase of Registration

General Company Data | Supply Scope | Quality, Safety, and Environment Data | Contacts | **Addresses** | Financial Data | QSE questionnaire

Portfolio - Step 5.1

Step 5.1

* Required fields

Addresses

Your address to send the Purchase Order is the same as the address where your company is based?

Yes * ☐ No * ☐

Step 4.2

Step 5.2 →

Save

Fig. 19 - Second Phase of Registration (Addresses Form)

5 - Portfolio

After the registration, you will be able to view all of the entered information via the “Portfolio” link. The information is in a tabbed format that is easy to use and intuitive.

The screenshot displays the efasST web application interface. At the top, there is a header with the efasST logo, a welcome message for 'Test Company', language options (Português, Español, English, Français), and links for Help, FAQ's, Contacts, and Logout. Below the header, a navigation bar shows icons for Home, Profile, Portfolio, and Mail. The main content area is titled 'Portfolio - Step 1' and includes an 'Edit' button. A progress bar indicates the current step. The 'General Company Data' tab is active, showing various input fields for company information. The fields are organized into sections: Identification (BPTSTENG), Country (United States), Company information (Legal Company Name: Test Company, Commercial Name: TEST COMPANY, Taxpayer identification number, Commercial Language: Inglês, Currency: USD - US Dollar), Company Address (Postcode: 6666-666, State: Maine, City: Auburn, Address: test), Company Contacts (Phone (+1): 1111111111111111, Phone 2 (+1), Fax (+1), E-Mail: ttteste@efa.com, Email 2, Web Site).

Fig. 20 - Portfolio

It is important that you update the data in the portfolio, in the event of a change in the information entered during registration. This is so that your portfolio is as up-to-date as possible.

After registration, the information will become static. To edit the contents of a particular form, select the desired tab and click on the button.

5.1 - Update Data Registration (for Current Suppliers)

If you are already an Efacec Supplier, your data were pre-filled, taking into account the information currently available. In this case, you should complete the existing data via the "Portfolio" link, according the next steps:

1. Enter your User Name and Password in the Secure Domain of efasst
 - 1.1. In the User field you should insert your Efacec Partner Code (started by PXXXXXXX)
 - 1.2. If you don't have any password to access Efacec systems (within Suppliers scope), you should use the "Forgot Password" option
 - 1.2.1. Fill the required information
 - 1.2.2. Upon submitting the information, you will be notified via e-mail, which will include your Password to access the Secure Domain of efasst.
2. Complete/Update your data via the “Portfolio” link. The data will be static and to edit the contents of a particular form, select the desired tab and click on the button.

6 - Communicator

efasst includes a feature called “Communicator,” which enables users to exchange messages and enables Efacec to record all communication.

Through this menu, you can:

1. View all posts on efasst

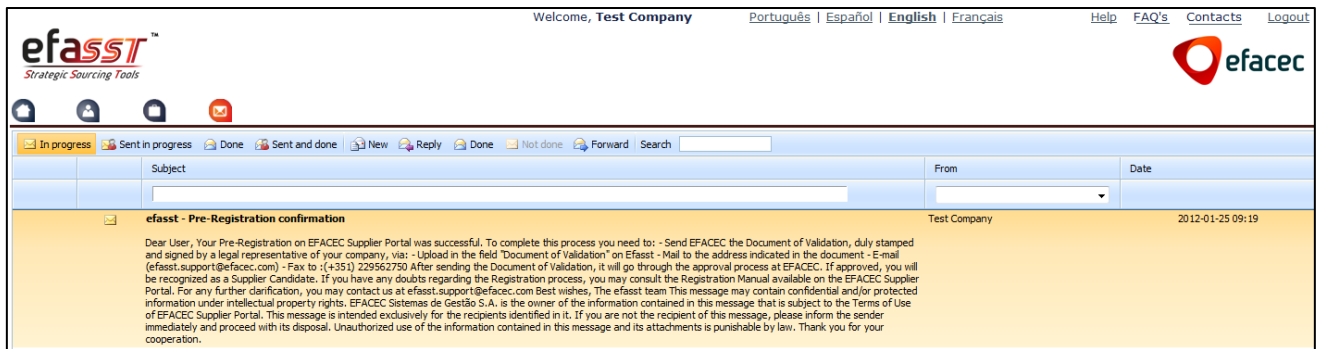


Fig. 21 - Posts in Progress

By double-clicking the message, it will be presented the detail of the selected message (as shown in the Picture below).

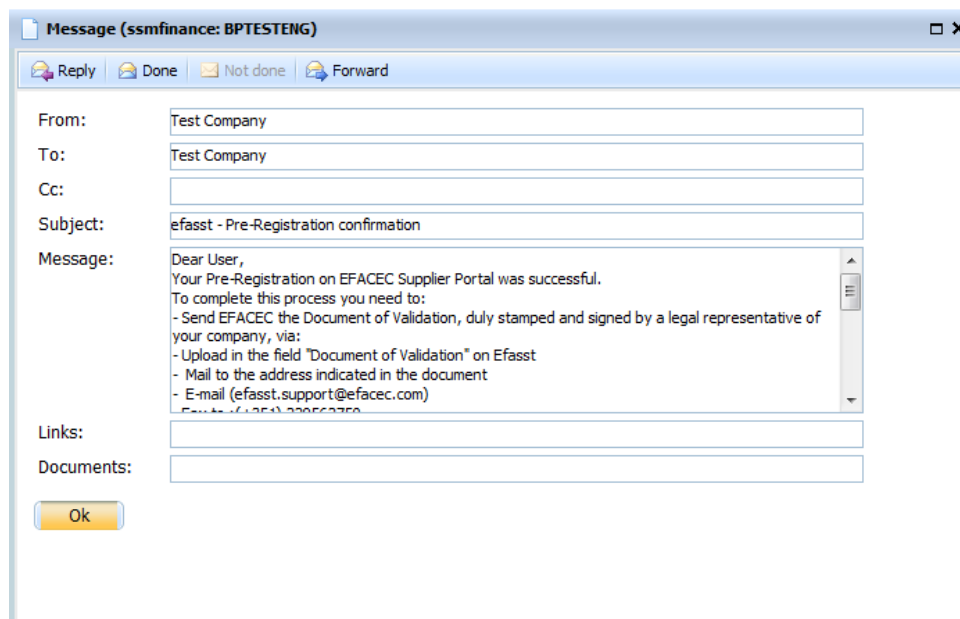


Fig. 22 - Message Detail

2. Create a new message

The screenshot shows the 'New Message' form in the EFACEC Supplier Portal. The form is titled 'Message (ssmfinance: BPTTESTENG)'. It includes fields for From (Test Company), To, Cc, Subject, and Message. There are also fields for Links and Documents, with a note '(Input document identifiers separated by \';\')'. Buttons for 'Send' and 'Cancel' are at the bottom. A red arrow points to the 'New' button in the top toolbar.

Fig. 23 - New Message Form

3. Reply to messages

The screenshot shows the 'Reply to Message' form in the EFACEC Supplier Portal. The form is titled 'Message (ssmfinance: BPTTESTENG)'. It includes fields for From (Test Company), To, Cc, Subject (RE: efasst - Pre-Registration confirmation), and Message. There are also fields for Links and Documents, with a note '(Input document identifiers separated by \';\')'. Buttons for 'Send' and 'Cancel' are at the bottom. A red arrow points to the 'Reply' button in the top toolbar.

Fig. 24 - Reply to Message

4. Mark Messages as done

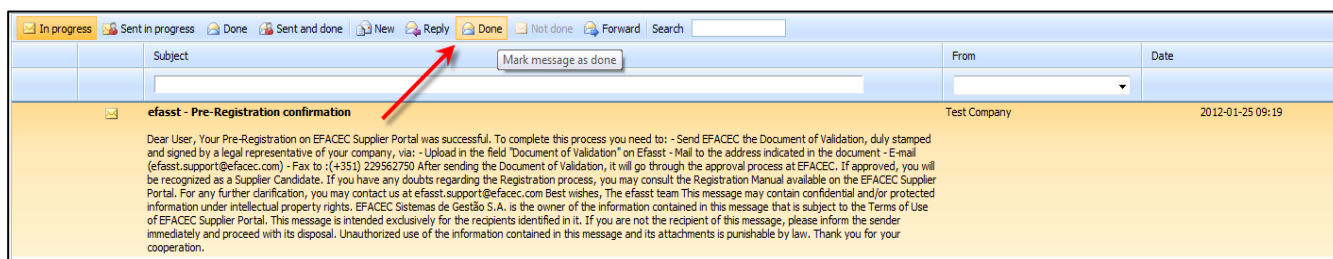


Fig. 25 - Mark Messages as done

5. Forward the Message

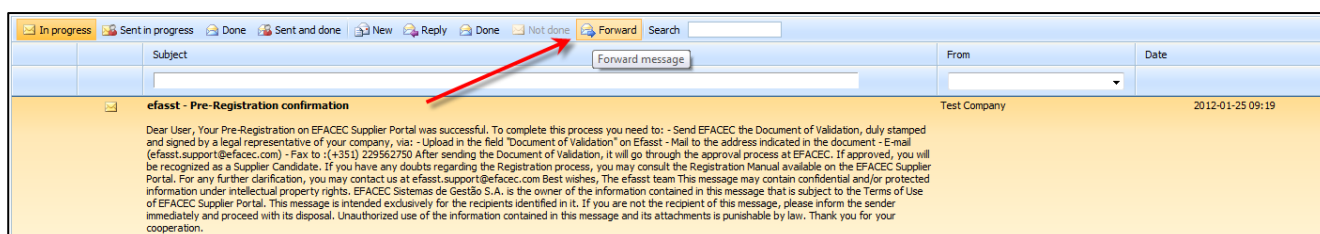


Fig. 26 - Forward the Message

Support

For questions, please contact us:

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