EPO procurement portal for suppliers

User guide

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Contents

1. Register using email invitation

You have been invited to log in and register on our procurement portal.

The invitation is valid for seven days. If your invitation has expired, contact supplier@epo.org for a new invitation.

Hello Joe BLOGGS

You have been invited to the European Patent Office's Procurement Portal. Your login is the following: Joe@bloggs.com

New user
You will need to first choose a password in order to access the application: Set new password.

Then you can access the application via the following link: Access the EPO Procurement Portal.

Password reset
In case you already have an account and have requested to reset your password, please follow the following link any time within the next seven days:

Click here

If you did not request a password reset, you can safely ignore this email and use your current credentials to connect to the application.

This is an automatically generated e-mail, please do not reply but contact supplier@epo.org if needed.

Kind regards
EPO Central Procurement

Perform the following steps to log in to our procurement portal.

Create a new password

1. Select the **Set new password** link in the invitation.

Your new password must be at least ten characters long and contain:

- at least one uppercase letter
- at least one lowercase letter
- at least one number
- at least one non-alphanumeric character, e.g. "%"

2. Enter your new password in the **New password** and **Confirm password** fields. Select **Save**.
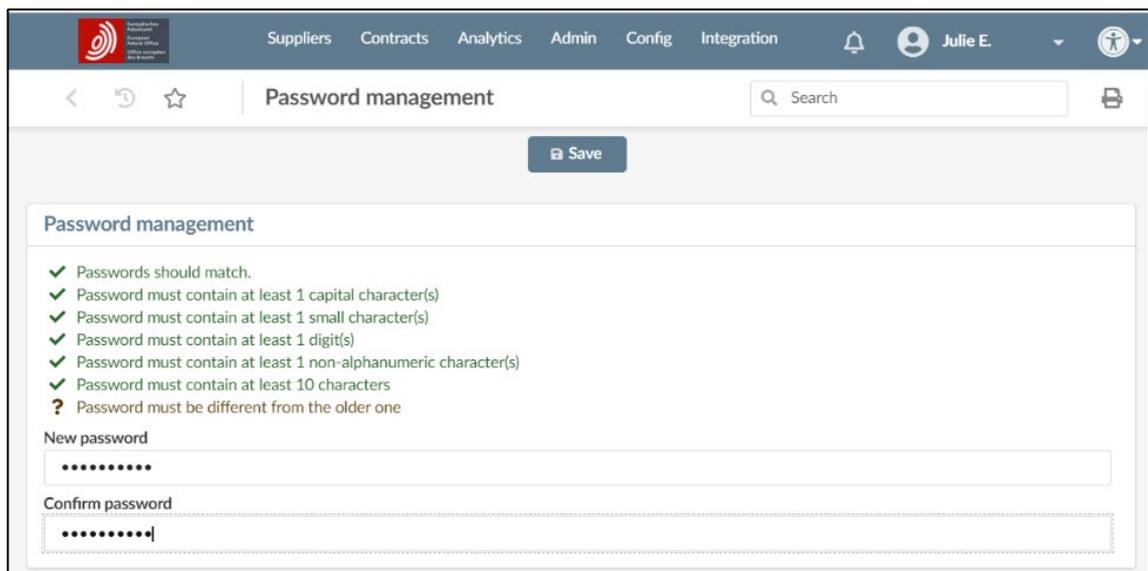
Log in to the EPO procurement portal

3. Select the **Access the EPO Procurement Portal** link in the invitation.

4. On the EPO procurement portal welcome page, enter the login ID provided in the invitation – this is usually your email address – and your newly set password.

5. Select **Login**.
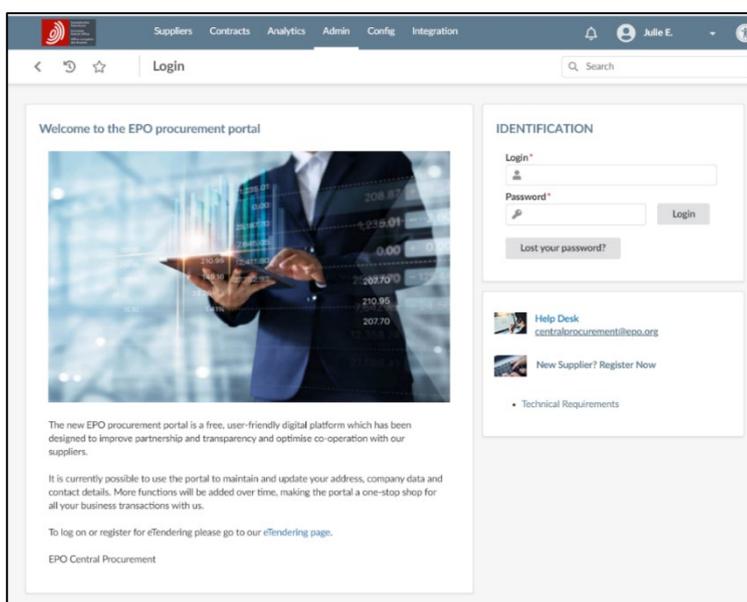
The first time you log in, you will be asked to read and accept our General Terms of Use and the EU General Data Protection Regulation before being able to access our procurement portal.

2.   Register without email invitation

Perform the following steps to register.

1.   On the [EPO procurement portal welcome page](#), select **New Supplier? Register Now**.

Complete all fields marked with a * and as many additional fields as possible. Use the ⓘ next to a field for additional help.

Company information

2.   Enter your company's name, preferred language and website address.

Address information

3. Enter your company address.
We use Google Maps address autocomplete, so as soon as you enter your **Address Line 1** information, the rest of the fields are filled in automatically.
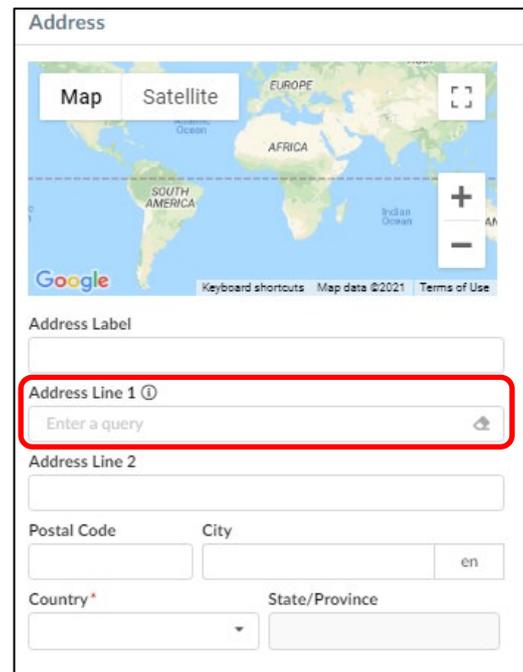
Contact information

4. Enter the details of the person who will act as your company's contact person and set a password.

The password must be at least ten characters long and contain:

- at least one uppercase letter
- at least one lowercase letter
- at least one number
- at least one non-alphanumeric character, e.g. "%"

Contact Information

First Name*

Last Name*

Position

en

Email*

Password*

Confirm password*

✔ Passwords should match.
✘ Password must contain at least 1 capital character(s)
✘ Password must contain at least 1 small character(s)
✘ Password must contain at least 1 digit(s)
✘ Password must contain at least 1 non-alphanumeric character(s)
✘ Password must contain at least 10 characters
? Password must be different from the older one

Company identification

5. To help us identify your company, complete at least one of the following fields:

Help us identify your company. Populate at least one of these fields

Tax Number

VAT ID ⓘ

DUNS ⓘ

Commercial register ID ⓘ

Company commodities

6. Select your company's service category from the Commodities dropdown list.

First time registration ? Please tell us more

Commodities

Please select

Comment

en

7. Enter the security code shown.

8. Once all mandatory fields have been completed, the **Register** button is activated. Select it or press Enter to submit your registration. You will receive an email confirming that you have registered successfully.

Log in

To log in, use your login ID (usually your email address) and the password you set during registration.

The first time you log in you will be asked to accept our General Terms of Use and the EU General Data Protection Regulation by checking the **I accept** box and then selecting **Acknowledge**.

1. To validate your company details, attach the following supporting documents:

   - bank details
   - commercial register details

   Additionally, you can also attach the following:

   - ISO certification
   - VAT validation

To attach a document, select the text highlighted in blue (*see screenshot*).
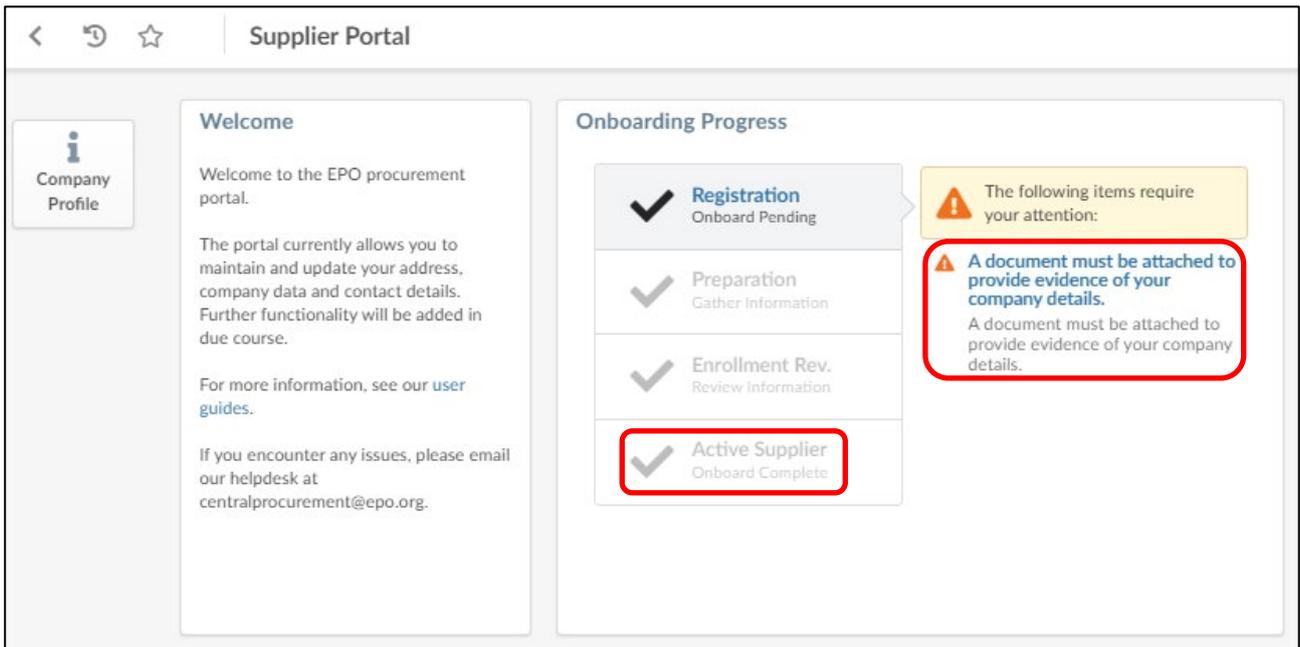
After you complete this step, you should see the following message:
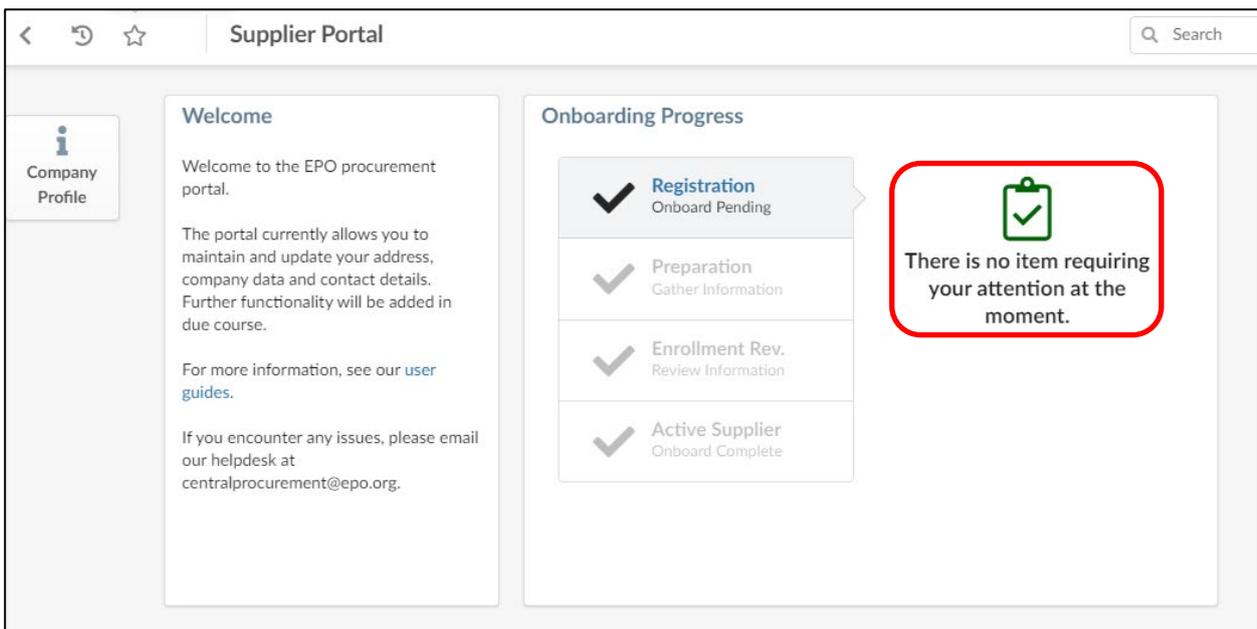
If you already have an active business relationship with us – we have awarded you contracts or placed purchase orders with you – and once we have checked that all your information is complete, you will see your status change to *Active Supplier*.

3.   Changing your company information

After logging in select **Company Profile** to update your company information, contacts, documents and certificates, P2P information and qualifications.

Some entries can be changed at any time, while others require an information change request (*see screenshot*). You will need to provide justification for the change request, enter the required change and submit for approval.

Company information categories

Use the icons on the left to navigate to the different information categories (*see screenshot*).
To change information in the category selected below, you will need to submit an information change request.

You can change the details of an existing contact person or add a new one.
Our contract partners must add a technical contact and a signing authority in
addition to the supplier admin.
Remember to save your changes.
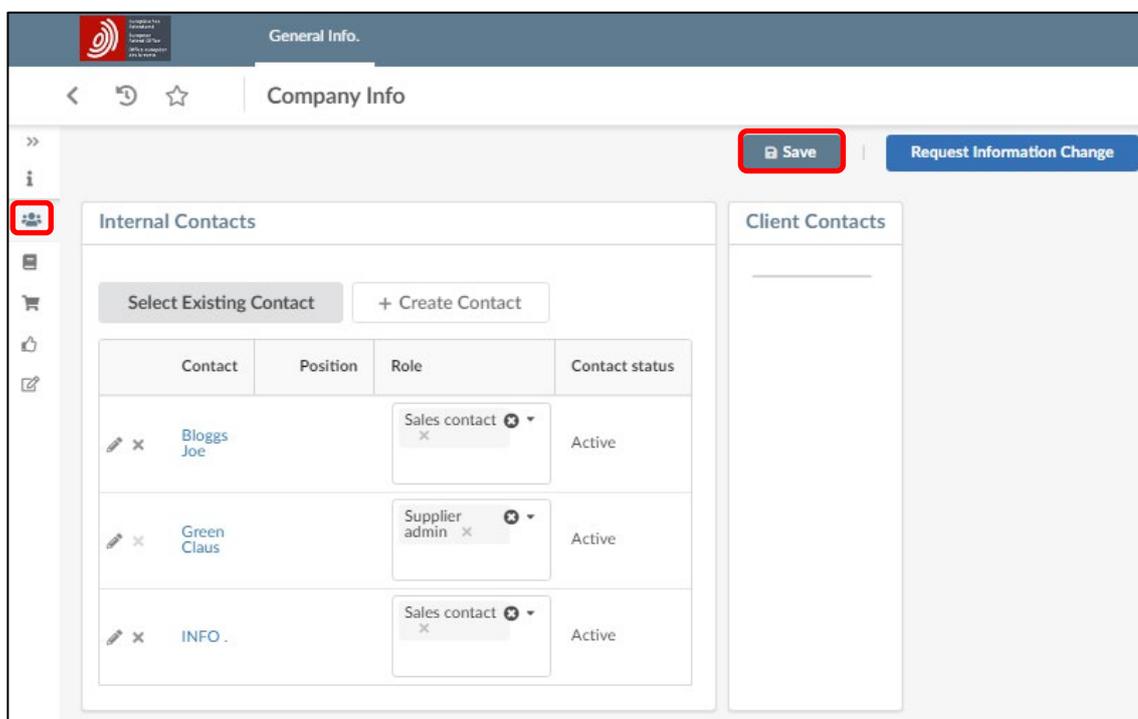
Documents and certificates

Select **Add Supporting Documents** and add any of the following documents to enable us to validate
your company details:

- bank details (also when notifying us of any changes to your bank details)
- commercial register details
- ISO certification
- VAT validation
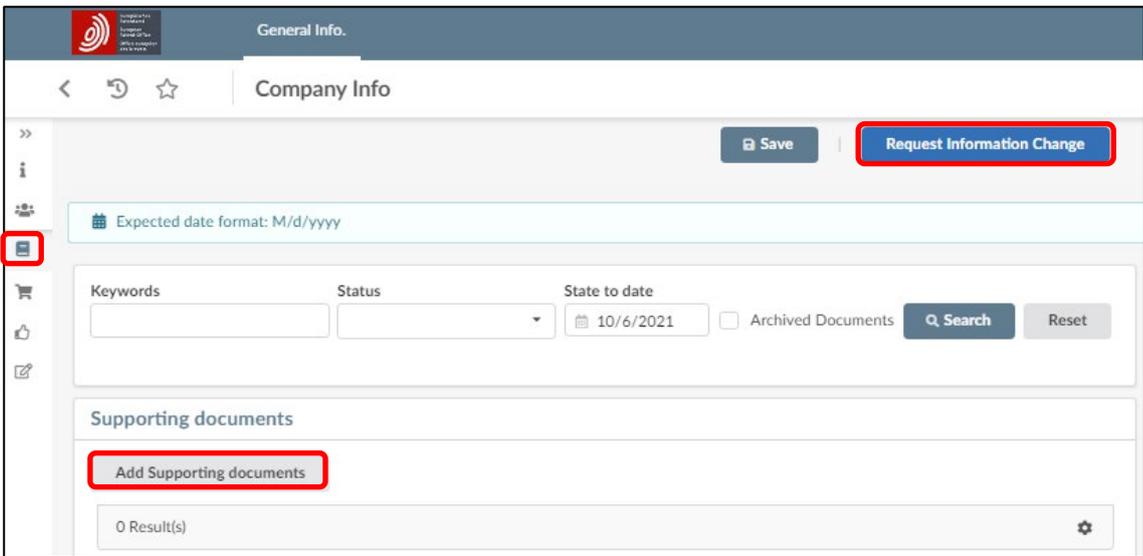
P2P information

Clear the checkboxes to make changes to your order and payment addresses.
Here, you will again need to submit an information change request.

Any change to banking information also requires an information change request.
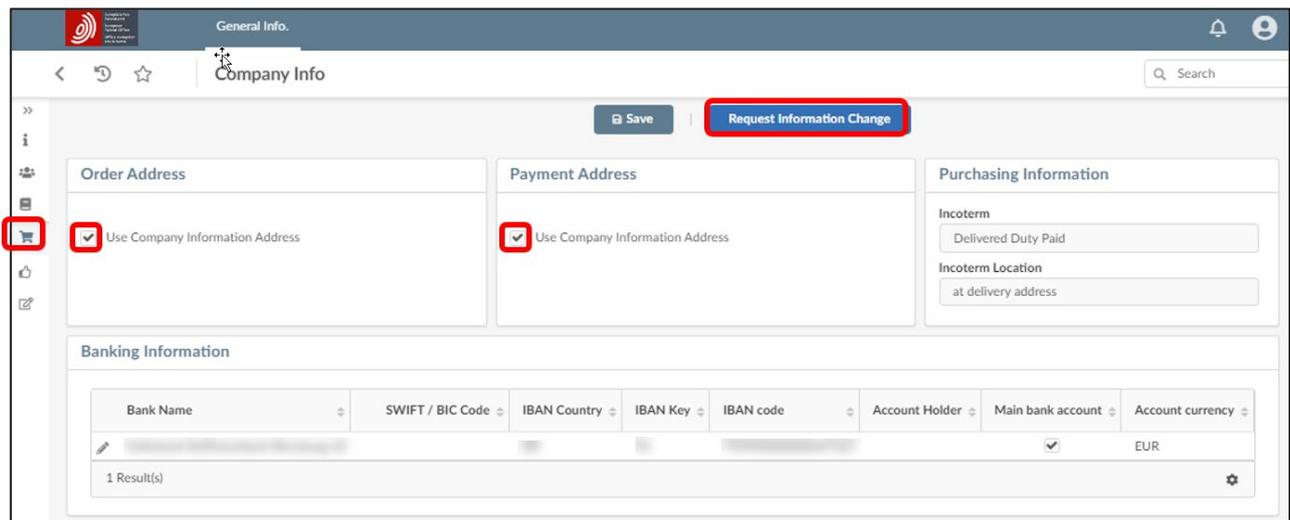
Qualifications

Use this section to change your commodity details and add any comments.

Change log

Here, you can check the status of your information change requests. You will not be able to edit requests once they have been submitted for approval.

4. My to-do list

There are two ways to access the outstanding tasks in your **My to-do list**.

One way is to select any entry in the **My to-do list** on the main Supplier Portal page.
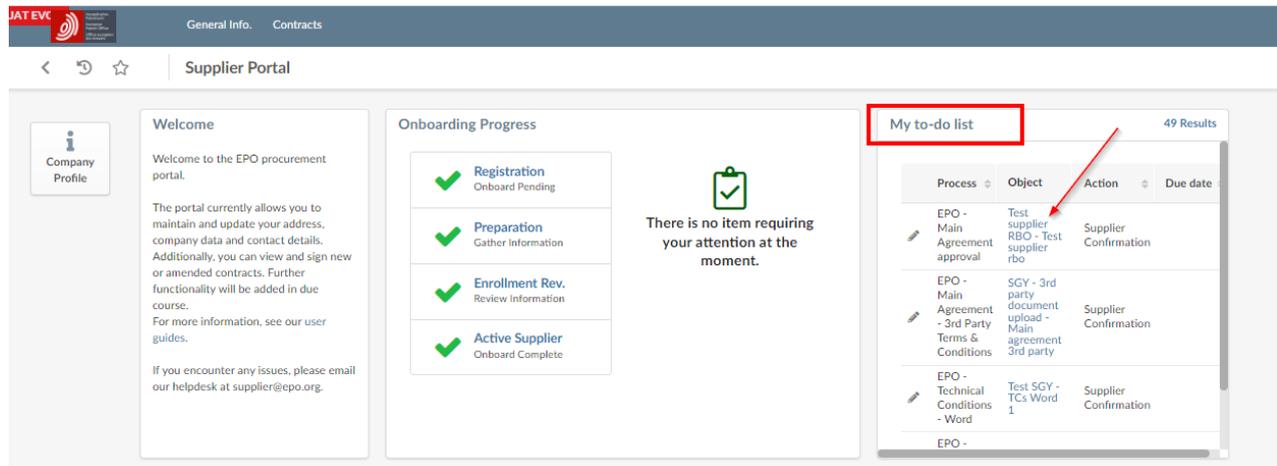
Alternatively, select your username then **My to-do list**.
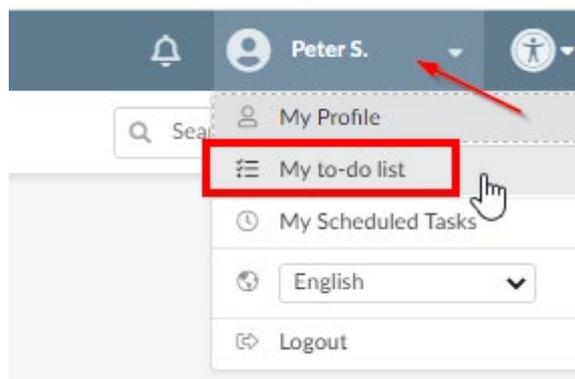
5. Contract management

You may see contract documents for approval or comments in your **My to-do list**. You will receive a notification if there is a contract-related task for you. This notification will also contain a link to the task.

Selecting **Contracts** then **Manage Contracts** provides a more comprehensive view of your contracts.

Search by keyword, contract type and status. Use the [pencil] symbol for more details.

Under **Documents** you will find all the documents associated with the contract – main agreement, general conditions, technical conditions, data processing agreement and other. Except for "other", only one document per type is permitted. Not all document types are required for every contract. Each document must be approved individually.

Document changes

You are not permitted to change documents directly. Use comments to propose changes.

To add a comment, select the speech bubble symbol to the right of the document clause.
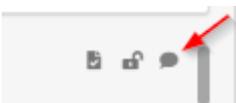
In the pop-up window you can add new comments or files and see comments from others.
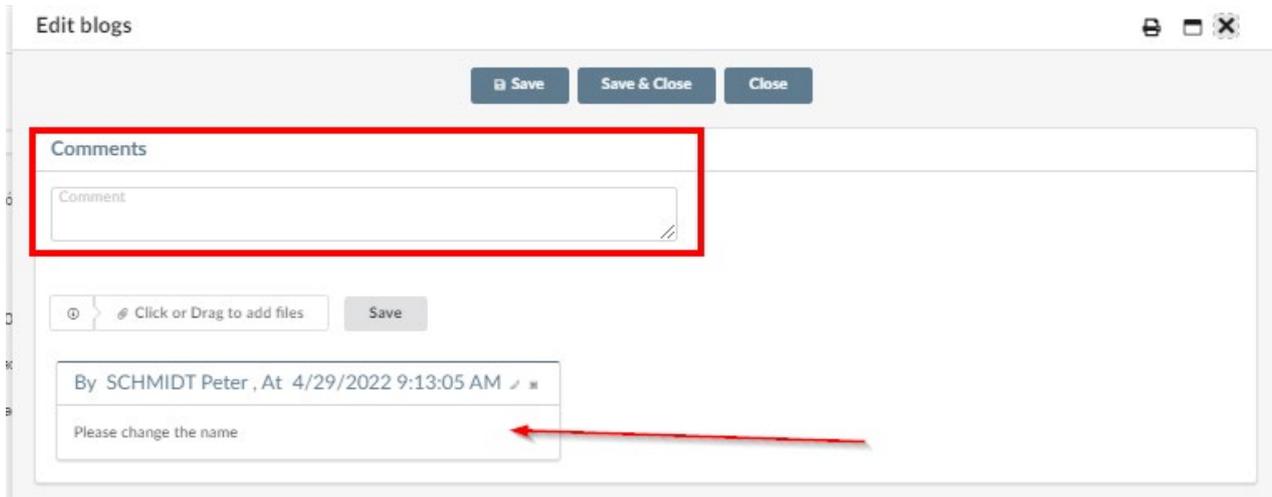
After adding your comments, select **Save** then **Close**. Once your comments have been saved, they will be visible to the EPO buyer responsible for the contract.

Contact your EPO buyer

You can also use the speech bubble to contact your EPO buyer.

Accept/reject a document

In the document view you have the option to accept or reject the document version.
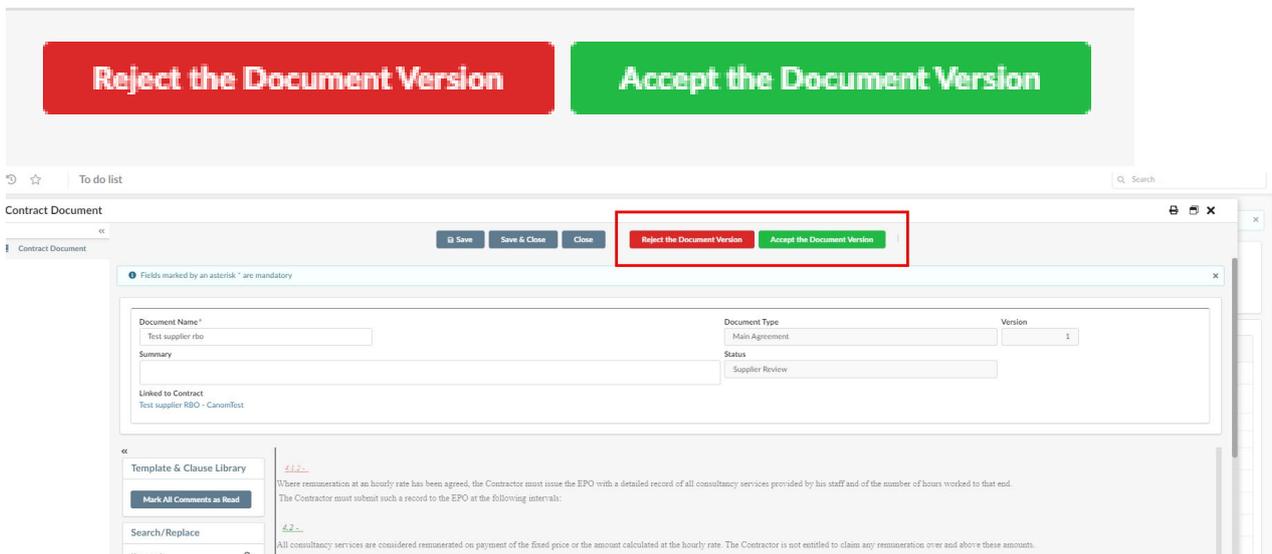
Select **Accept the Document Version** if you agree with the content of the document. Once all documents have been accepted, the buyer will trigger the electronic signature process.

Select **Reject the Document Version** if you do not agree with the content of the document and/or if you have added comments.

6.   Useful tips

6.1.   Multiple suppliers

If your profile or username is linked to several suppliers, switch between them by using the dropdown menu in the upper right corner.
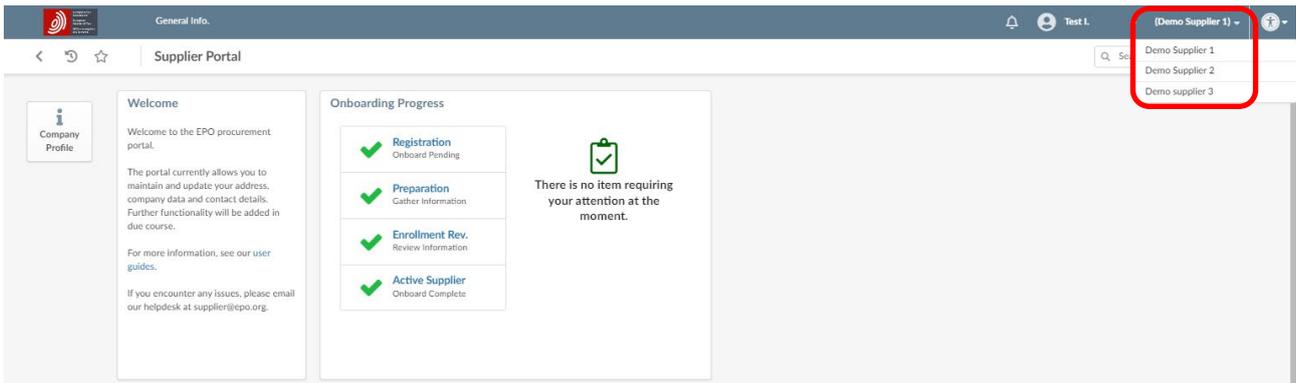
6.2.   Column settings and Excel downloads

In the browse (list) view, for example in **Manage Contracts**, you can change column settings and download results to Excel.
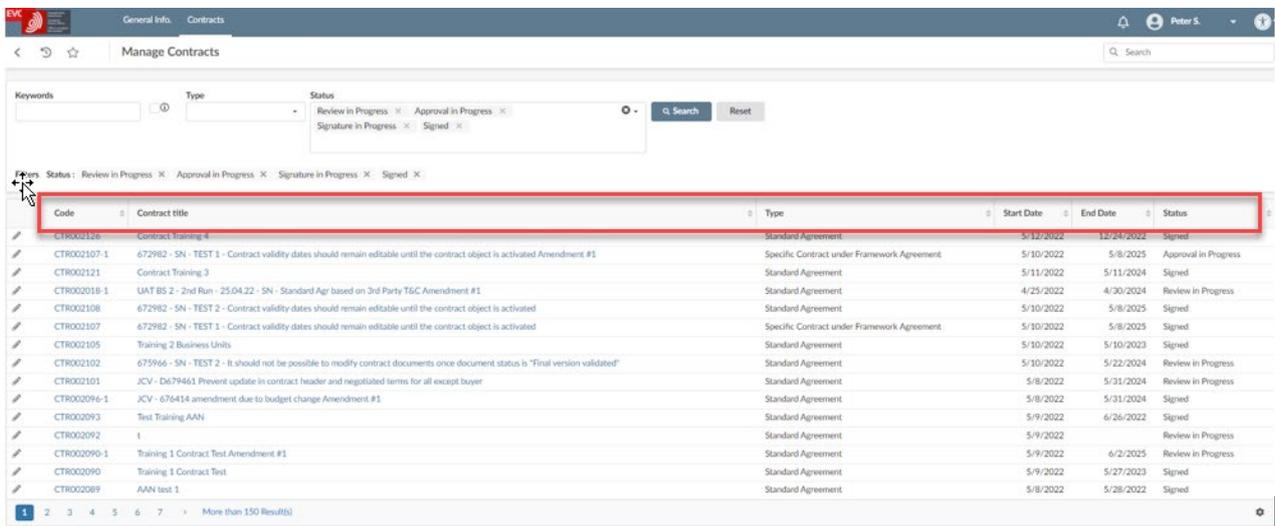
Select and hold (or right-click) any of the column headers or select the ⚙ symbol in the list footer to change the following settings:

Grid settings		
Freeze grid header		
Grid column settings		
Editing column		
Deleting column		
Code		
Contract title		
Type		
Start Date		
End Date		
Status		
Grid Actions		

Download table "Manage Contracts" in Excel format

Reset to default parameters
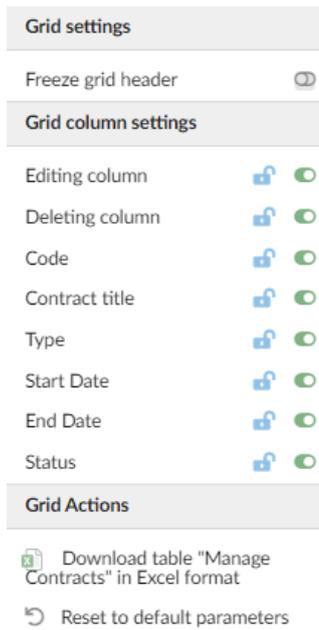
Freeze grid header – Freeze the column headers so that they are always displayed when scrolling down long lists of items.

Show/hide columns – use the column label toggles to show or hide columns in the results list.

Column sorting – move column labels to change sort columns.

Select **Reset to default parameters** to go back to the default settings.

There is also an option to download the displayed list in Excel format.

7. Contact us

If you need more help or have any questions about the procurement portal, contact supplier@epo.org.