



# Vendor Onboarding

Felix User Guide

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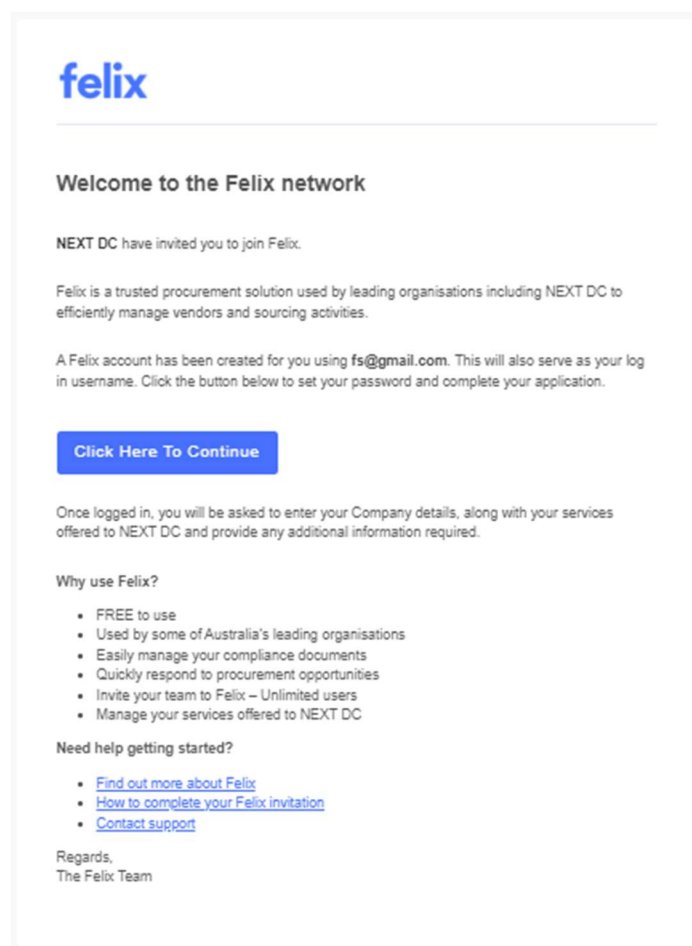
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## INTRODUCTION

This user guide provides an understanding about the onboarding process for vendors. It also explains the step-by-step process on how to complete each section on the onboarding application in Felix.

## VENDOR INVITE EMAIL

Organisations can invite vendors directly to Felix via email. Once they have sent the invite, the account will be automatically created and you will receive a welcome email asking you to log in.



**Note:** If you have an existing Felix vendor account and you have received a "rogue invite", please reach out to the organisation you've been invited by to request they send a new invite to your preferred email.

## CREATING A PASSWORD

It is important to set a strong password to protect the information in your Felix account. It is recommended to:

- Use a combination of uppercase and lowercase letters
- Use one or more special characters
- Do not use any personal information in your password

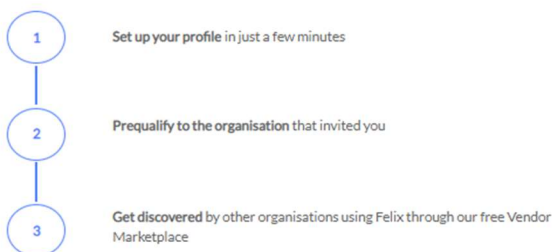
## ACCEPTING TERMS AND CONDITIONS

Before using Felix, you need to accept the Vendor Terms and Conditions. Accepting the terms and conditions means you have understood the agreement you are entering into and that it suits you as well as the organization.

Once you have clicked the link from the vendor invite email, it will take you to this page where it briefly explains how Felix works and where you can accept the terms and conditions which will allow you to set up your account password and gets started on the platform.

### Welcome to Felix

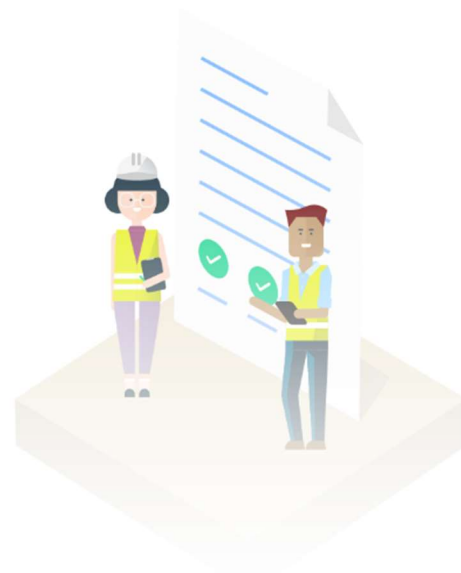
You have been invited to engage with an organisation using Felix.  
Here's how it works:



Felix is free to use for vendors who have been invited to join our Vendor Marketplace by an organisation using Felix to manage and source from their vendors.

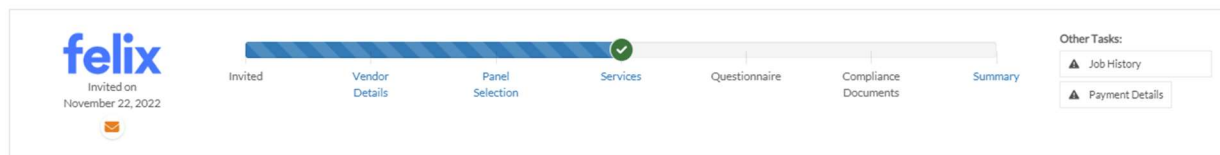
- ☐ I have read and agree to Felix [Vendor Terms and Conditions](#)
- ☒ Make me discoverable to other organisations using Felix

Let's get started



## VENDOR DASHBOARD

The vendor dashboard shows the progress of your onboarding application for each organisation. You can access each section of your onboarding application via the **application stepper**.



The name of the organisation is displayed in the left-hand side of the application stepper. Underneath the organisation's name is the status of your application, along with the date that the status was last updated.

The progress of your application is indicated by the blue progress bar. The progress bar indicated which step of the application you are currently working on. You can access each step of your application by clicking the section name under the progress bar. Alternatively, you can click the **Continue** button to automatically take you to the next step.

Depending on an organisation's onboarding requirements, your application stepper may show a different number of sections that need to be completed. Organisations may also request you to provide further information such as **Job History** and **Payment Details**. These can be seen to the right-hand side of the application stepper. If the organisation has set these tasks as mandatory, you will need to complete them before you are able to submit your application.

**Note:** The onboarding process is sequential. You will not be able to access a section if you have not already completed the previous section. However, you can return to a previous section at any time prior to submitting your application to review or update details.

## ONBOARDING PROCESS

### Vendor Details

Vendor Details is the first section you'll complete when onboarding as a new vendor on Felix. It has three sections namely:

#### Profile Details

This section contains the name, address, phone number, ABN, and website of your company as well as additional details. Required and non-required fields are listed below.

- (Required) **Registered Business Name**
- (Required) **Legal Entity Name**

- (Required) **Country/Territory of Origin/Headquarters**
- (Required) **ABN**
- (Required) **Company Phone Number**
- **Website**
- (Required) **Address**
- (Required) **Distance willing to travel**

### Key Contact

This section contains the key contact information. Required and non-required fields are listed below.

- (Required) **Contact First Name**
- (Required) **Contact Last Name**
- **Contact Job Title**
- (Required) **Contact Mobile**
- **Contact Phone**
- (Required) **Contact Email** - This field is prepopulated based on the email you were invited with.

**Note:** Key Contact information can be changed in User Management Settings.

### Branch Locations

This section allows you to add branches of your business if there are available. Fields listed below are required.

- (Required) **Branch Name**
- (Required) **Branch Contact First Name**
- (Required) **Branch Contact Last Name**
- (Required) **Branch Email Address**
- (Required) **Country/Territory of Branch**
- (Required) **Address**
- (Required) **Branch Phone Number**

### Panel Selection

Panels are used to arrange vendors into groups based on the rules and requirements set by an organisation. Your membership in a panel can affect what kind of services you are able to add, along with the information and documents that are requested as you proceed with onboarding.

An organisation can set rules for their panels. For example, they may have a panel that is set up to only allow cranes. If you are a member of the crane panel and no others, you will not be able to list any services other than cranes.

Panel rules may also apply to compliance documents and questionnaires. An organisation may set up a panel for which the vendors are required to provide a specific set of documents, whereas vendors on a separate panel may only be required to provide Workers Compensations documents.

In the Panel Selection section, you don't have to select which panel to register as this has already been done by the organisation upon sending the email invitation. Just click the **Proceed** button to continue.

**Tip:** If you believe that you have been placed in the incorrect panel, it is best to reach out to the organisation directly. If you are unsure who to contact, you can reach out to the Support team at [help@felix.net](mailto:help@felix.net).

## Services

Felix allows you to list the services that you provide to an organisation and can quote on. The services that are listed on an account allow organisations to match relevant vendors depending on their needs.

During onboarding, you will need to add at least one service per organisation. An organisation may limit the services you are able to choose from depending on your membership to certain panels.

**Tip:** Having an accurate and up to date listing of your services will better help organisations to match with your business when searching for specific services or issuing an RFQ.

## Service Types

Felix splits services into three types:

- **Hire Equipment** (Wet & Dry)
- **Trades**
- **Products**

**Note:** **Wet Hire** refers to the hire of equipment with an operator. **Dry Hire** is the hire of equipment without an operator.

## Adding a service

To add a new service:

1. Click on the **Add Service** button in the upper-right corner of the page.
2. Click the dropdown to select which panel to add a service to.
3. (Optional) Use the **Filter** dropdown menu to filter by **Service Type**.
4. Select the relevant services you would like to add to your account by checking the box beside the service category.

**Add Service** Back

Select Panel Service Provider

Filter Any Type Filter Services

Scaffolding 3 selected

- ☒ Self-Supporting Scaffold
- ☒ Specialty Scaffolding

Static Scaffolding

- ☒ Steel Scaffolding
- ☒ Suspension Scaffold

Traffic & Crowd Control Equipment

Traffic Controller

Traffic Management Services

**Add Services**

- (Optional) Use the dropdown menu provided (if there is available) if you wish to also add the service to another panel.
- Click the **Add Services** button at the bottom of the page.
- Click the **Manually set terms** button if you wish to manually enter the service terms of the hire equipment. Otherwise, click the **Continue** button to automatically use the maximum availability and/or contract value.

**Service Terms** ×

We will automatically configure your services for maximum availability when you continue from this screen.

Alternatively, you can configure this yourself by clicking below.

Manually set terms Continue

**Tips:**

- The Also add to: dropdown menu will only appear if the selected service has also been allowed on another panel you are registered against.
- You will only be allowed to add one service from the same sub-category unless it is a hire equipment service. Hire equipment services can be **duplicated** to allow multiple entries from the same sub-category.



## Duplicating a service

To duplicate a hire equipment service:

1. Locate the relevant service you wish to duplicate.
2. Hover over the **ellipsis icon** and select **Duplicate** from the options.
3. Edit the service details as required.
4. Click the **Save** button.

**Note:** You will only be able to duplicate services belonging to the hire equipment service type.

## Service Terms

Felix allows you to specify the service terms for services that you have added to your account. You can only add service terms for **Hire Equipment** service types where you can specify the **minimum** and **maximum hire terms**.

## Setting service terms

To set the service terms for a service:

1. Click the **Manually set terms** button in the popup that appears when adding the service to your account.
2. In the **Hire Terms** section, use the slider to select the minimum and/or maximum hire terms for your equipment.
3. In the **Hire Type** section, click the checkboxes provided to indicate if the service is available for **Dry Hire** and/or **Wet Hire**.
4. Click the **Add Services** button.

Add Service Terms

*i*
Use the settings below to set default hire terms for all your services. These can be updated later as required

Equipment
2 Person Crew - Day Rate

Hire Terms
Select the minimum hire terms for your equipment

5 hour(s)

Hire Type
Set the hire type of your equipment. Note: These settings will only be applied to relevant categories

☒ Dry Hire
☒ Wet Hire

Back
Add Services

## Service Availability

The service availability setting allows you to indicate which organisations and panels a particular service should be made available to. You can make a service available to multiple panels and organisations at the same time.

### Adding an existing service to a new panel

To make an existing service available to a new panel:

1. Locate the service you wish to make available to a new panel.
2. Hover over the **ellipsis icon** and select **Edit** from the options.
3. Go to the **Service Availability** section.
4. Click the checkbox beside the panel/s that you wish to make the service available to.
5. Click the **Save** button.

### Notes:

- If you are unable to check the box beside a panel it means that the organisation has not allowed this service to be added to the panel. You will be required to **add a new service** for the panel and select from the categories that have been allowed by the organisation. This must be repeated for each existing service you wish to add to a new panel. Services that haven't been associated with a panel will not display for organisations or standard rates submission.
- Organisations have the ability to configure which service categories can be made available to a panel. Some of your services may not be able to be made available to every panel you are registered against.

### Questionnaire

The onboarding process includes a custom questionnaire provided by the organisation to assist in their evaluation of vendors seeking to become approved. The questionnaire may be short or extensive depending on the specific requirements of the organisation.

It can have a mix of mandatory and optional questions that have been set by the organisation. You should work through each section of the questionnaire, ensuring that you have completed all mandatory fields.

You may be required to download, sign and/or upload documentation to support the relevant questions. Documentation that has been provided by the organisation can be downloaded by using the **orange** highlighted links in the question summary text.

**Tip:** You can save your questionnaire responses and come back to them at any time using the **Save** button at the bottom of the questionnaire.

The questionnaire is broken up into several different sections and may change based on the panel you are registered against or the services that you have made available. The sections can be viewed in the panel to the left-hand side of the questionnaire. You can click on a section title to view the relevant section.

Once you have completed all mandatory questions, you can submit the questionnaire and proceed with your onboarding.

To submit the questionnaire:

1. Review the questionnaire and ensure you have completed all mandatory questions.

2. Click the **Save** button then the **Complete questionnaire** button.

### Tips:

- If you are unable to proceed to the next section of your application, you may still have mandatory questions to complete. Check that no sections are incomplete and that all mandatory fields have been filled in.
- If you are unsure how to respond to a question, or if you have concerns about providing such information, it would be best to reach out to the organisation directly for discussion.

## Compliance Documents

When completing a prequalification for an organization, you may be required to provide compliance documents. These documents are used by an organisation to verify that certain requirements have been met such as evidence that you hold certain insurances and/or licenses.

An organisation will set their own requirements for which compliance documents are mandatory and which documents can be optionally provided. The documents you are asked to provide may be affected by the panel/s you are registered against, the services you have added and/or your responses to the questionnaire. The compliance documents that an organisation indicates as mandatory are itemised in the **Compliance Documents** section of your prequalification, accessible through the application stepper.

Based on your business profile, you are required to supply the following Compliance Documents before progressing.

Public Liability Insurance	 Added
Workers Compensation Insurance	 Add Now

### Adding a new compliance document

To add a new compliance document:

1. Navigate to the **Compliance Documents** section from the application stepper.
2. Click the **Add New Document** button in the top right corner. (If you are a new vendor and you can see the **Add Now** button below the application stepper, clicking it will automatically choose the required type of document you are to add but you can still upload new documents using the **Add New Document** button depending on your preference.)
3. Update the following fields:
  - **Compliance Document Type** - Click the dropdown to select the type of document from the options.
  - **Issuer** - Enter who issued the document. (For insurance documents)
  - **Name of Document** - Enter the name of the document. (For supporting documents)
  - **Provider** - Enter who provided the document.
  - **Policy Number** - Enter the policy number of the document. (For insurance documents)


- **Document Number** - Enter the document number of the document. (For supporting documents)
  - **Cover Amount** or **Dollar Value** - Enter the amount covered or the amount of the insurance. (For insurance documents)
  - **Document** - Upload the relevant file in the dropzone.
  - **Commencement Date** - Enter the date the document started.
  - **Expiry Date** - Enter the date the document expires. (For certificate and insurance documents)
  - **Employees Covered** - Enter the names of employees covered in the insurance. (For Workers Compensation Insurance document)
  - **Coverage Per Person** - Enter the amount covered in the insurance per person. (For Workers Compensation Insurance document)
  - **Relates to** - Select from the radio buttons if the document relates to your **Company** or to an **Item**.
4. Click the **Save** button.



**Tip:** If your insurance doesn't have a policy amount, (e.g. Workers Compensation Insurance) it is recommended to enter "0" (zero) in the **Dollar Value** field.

### Updating a compliance document

Expired compliance documents may cause your account to become suspended or fall into non-compliance. To keep you on top of all your documents, Felix will highlight any documents that are **expiring within 30 days** in **gold**. Documents that have already expired will be highlighted in **red**.

These compliance documents that need to be updated are itemized as well in the **Compliance Documents** section, accessible through the application stepper.

 You have documents below which need to be actioned. Please do so as soon as possible to remain compliant.

Product Liability Insurance	Expired	 Update Now
Workers Compensation Insurance	Expired	 Update Now

To update an existing compliance document:

1. Navigate to the **Compliance Documents** section from the application stepper.
2. Locate the document that requires updating. You can see the documents that need updating are itemised below the application stepper and are also highlighted in **red** in the compliance documents list.
3. Click the Update Now button or hover over the **ellipsis icon** and select **Update** from the options.
4. There are two options:
  - Click **Yes** if you want to copy the details of the previous version of the document. The details that will be copied from the previous version of the document are **Compliance Document Type, Title, Provider, Number, and Dollar Value**.
  - Click **No** if you do not want to copy the details of the previous version of the document.
5. Update the details of the compliance document as required.
6. Click the **Save** button.

## Archiving a compliance document

To archive an existing compliance document:

1. Navigate to the **Compliance Documents** section from the application stepper.
2. Locate the compliance document that requires archiving.
3. Hover over the **ellipsis icon** and select **Archive** from the options.
4. Click the **Yes** button to confirm.

**Tip:** If you are unable to select the relevant type of document from the dropdown menu when updating a compliance document, you should instead **archive** the document.

**Note:** Account suspensions due to expired compliance documents are normally lifted overnight once the relevant document has been **updated** or **archived**.

## Summary

This section shows the summary list of each section of your onboarding as well as their statuses. A **green check mark** indicates that you have completed the section and a **red x icon** indicates that the section is still incomplete. You can still edit or complete a specific section by clicking the **pencil icon**. Upon completing the required sections, click the **Submit Application** button.

Please review the steps below to ensure you have completed each of the required steps prior to submitting.

Vendor Details	
Panel Selection	
Services	
Questionnaire	
Compliance Documents	
Job History (Optional)	
Payment Details (Optional)	

Submit Application

## Job History

The Job History section allows you to share your job experiences with organisations you are onboarding for to present yourself as an experienced vendor.

Organisations can set the job history requirement as mandatory or optional. If an organisation has indicated that it is mandatory to provide a job history, the task will be highlighted in **yellow** on your application stepper. You will not be able to submit your application until this task has been completed.

## Adding a job history

To add a new job history:

1. On the application stepper under **Other Tasks**, click the **Job History** link or if you are in the **Summary** section, click the **pencil icon**.
2. Click the **Add New** button in the top right corner.
3. In **Project Details** section, update the following fields:
  - **Project Name** - Enter the name of a project you have previously worked on.
  - **Client** - Enter the name of the client you were contracted by.
  - **Project Country** - Select the relevant country from the dropdown.
  - **Project Location** - Enter the relevant location and select from the list that pops up as you enter the location.
  - **Sector / Industry** - Select the appropriate sector from the dropdown.
  - **Job Completion** - Enter the percentage value to represent the progress of the project.
  - **Contract Value** - Enter the total value of your engagement with the client on the project in dollar value.
  - **Total Project Value (if known)** - Enter the total value of the entire project for all vendors (including you).
  - **Start Date** - Enter when the project started.
  - **End Date** - Enter when the project ended.
  - **Summary** - Enter a description of the project.
4. In **Referee** section, enter the contact details of a referee from the project. Update the following fields:
  - **First name**
  - **Last name**
  - **Position**
  - **Email address**
  - **Phone number**
5. In **Share your experience** section, click the checkbox to select which organisations you want to share your experience with on the project.
6. Click the **Save** button.

**Tip:** Entering “0” (zero) in the **Job Completion** field will indicate that the project has not yet started. Entering “100” (one hundred) will indicate that the project has been completed.

## Editing a job history

To edit a job history:

1. Navigate to **Felix Memberships > Job History** from the main menu.
2. Locate the job history entry that you would like to edit.
3. Hover over the **ellipsis icon** and select **Edit** from the options.
4. Update the details of your experience as required.
5. Click the **Save** button.

### Removing a job history

To remove a job history:

1. Navigate to **Felix Memberships > Job History** from the main menu.
2. Locate the job history entry that you would like to remove.
3. Hover over the **ellipsis icon** and select **Delete** from the options.
4. Click the **Delete** button to confirm the deletion.

### Payment Details

Payment Details section allows you to provide your bank account details. Once provided, each organisation will validate the set of payment details made available to them on Felix.

When onboarding for the first time as a new vendor to an organisation, you'll need to create a new set of details. If you're an international vendor, you'll be asked to provide an IBAN and Swift code.

### Adding payment details

To add new payment details:

1. On the application stepper under **Other Tasks**, click the **Payment Details** link or if you are in the **Summary** section, click the **pencil icon**.
2. Click the **Add New Payment Details** in the top right corner.
3. Complete the mandatory fields in each section.
4. Click the **Save Payment Details** button.

Once you have submitted a set of payment details and they've been reviewed, you'll receive notification as to whether they've been approved or declined by the organisation.

### Notes:

- Payment details are created against an individual organisation and can't be shared between organisations.
- Supporting Document requirements are set by each individual organization. If you're unsure what to provide it's best to reach out to the organisation for assistance.

### Deactivating payment details

Deactivating your payment details will notify customers to no longer use your payment details when engaging with your business.

To deactivate payment details:

1. Navigate to **Felix Memberships > Payment Details** from the main menu.
2. Locate the relevant set of payment details.
3. Hove over the **ellipsis icon** and select **Deactivate** from the options.
4. Click the **Yes** button to confirm.

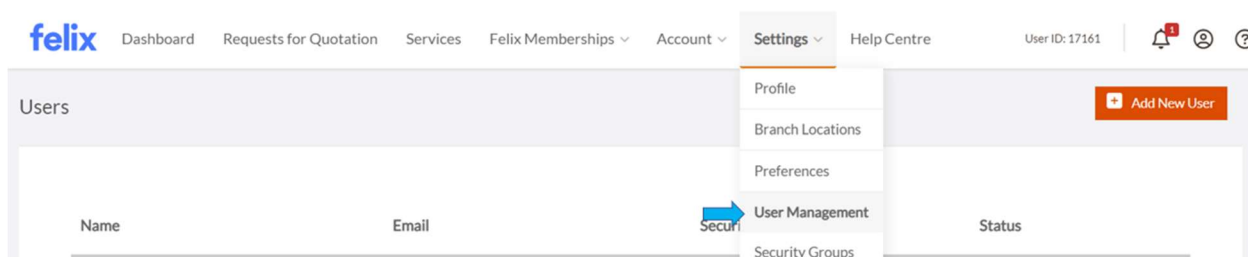
**Note:** Once you have deactivated a set of payment details, it isn't possible to reactivate them.

## ADDING ADDITIONAL USERS

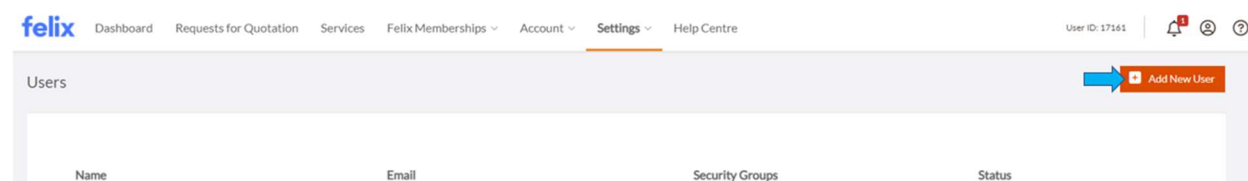
New users can be created at any time, allowing you to invite your whole team onto Felix if it's necessary so you can collaborate on registrations, prequalifications, and RFQ responses.

To add additional users:

1. Navigate to **Settings > User Management** from your Felix dashboard.



2. Click the **Add New User** button at the top right corner.



3. Fill out the required fields.
  - **First Name**
  - **Last Name**
  - **Email**
  - **Security Groups** - Select an option from the dropdown menu.
  - **Status** - This is grayed out and already set to Approved as default.
4. Click the **Save** button. The new user will receive a notification to the nominated email address which will contain their username and a link to create a password.



#### User Details

All fields marked with \* are mandatory.

First Name*	<input type="text" value="Juan"/>
Last Name*	<input type="text" value="Nathan"/>
Email*	<input type="text" value="jnathan@felix.net"/>
Phone	<input type="text" value="+61"/>
Mobile	<input type="text" value="+61"/>
Job Title	<input type="text"/>
Security Groups*	<input type="text" value="Vendor Admin"/> <span>X</span> <span> </span> <span>▼</span>
Status*	<input type="text" value="Approved"/> <span>▼</span>



**Note:** If you receive an "Email already taken" error, this means the user you're wishing to add already has an existing Felix account. In these instances, it's best for the user in question to reach out to the Support team to either delete his Felix account or you can request to merge the accounts.

## HELP & SUPPORT

Felix Support Services are provided as described in your contract. Felix Support provides assistance through committed staff operating our customer Help Desk. Upon contacting the Help Desk, customers will be issued with a ticket identification number which will be used for the life of that specific case and connected with a Support team member best equipped to assist with their issue.

### Operating Hours

The Felix Support team operates 7:00am to 7:00pm (AEST UTC+10:00) Monday to Friday. The Help Desk closes for Australian public holidays, Queensland state public holidays, and Brisbane area public holidays.

Tickets sent through on these days will be responded to as soon as possible the next business day.

## Channels

Email	help@felix.net
Phone	<b>Australia:</b> +61 7 3062 8260 <b>New Zealand:</b> +64 9-888-0797
Online Chat	Available in-platform when authenticated.

## Help Centre

Customers can access online documentation and resources via the Felix Help Centre at <https://help.felix.net/s/>.