

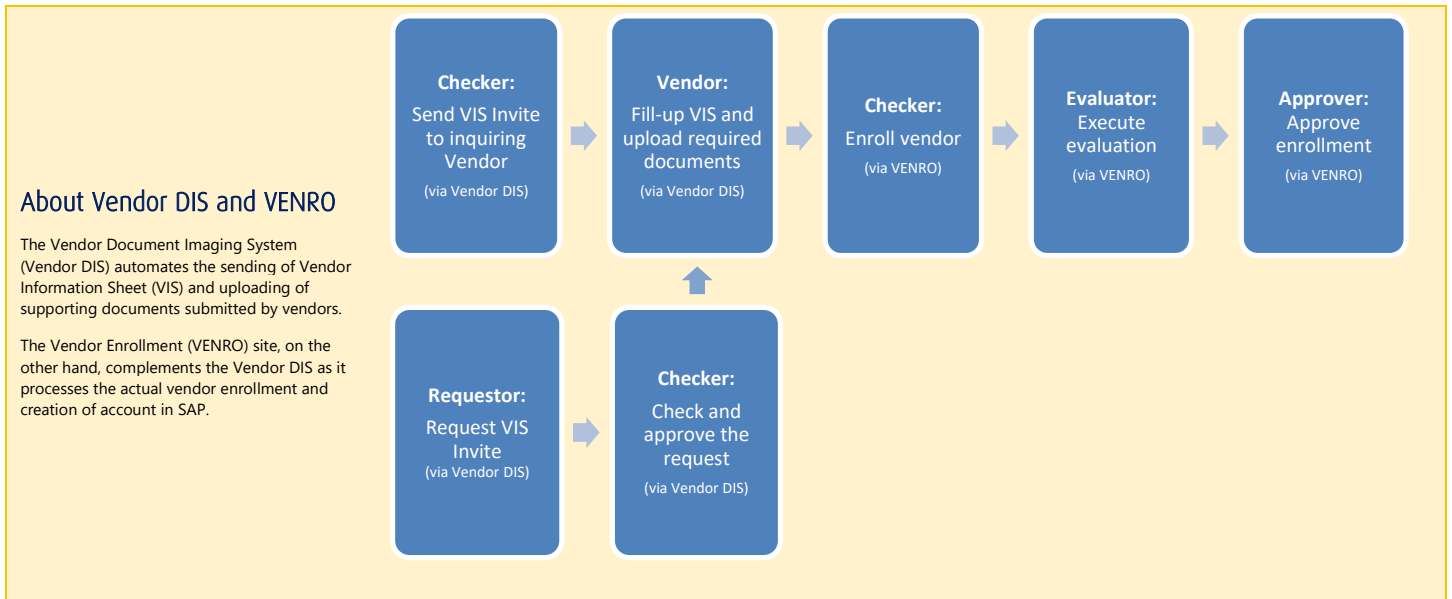


PRIME

Enrolling a Vendor using the Vendor DIS and VENRO site

Quick Reference Guide

This quick reference will show you the steps in submitting and processing requests filed through the Vendor DIS and VENRO site.



Click a link below to skip to the corresponding section of this Quick Reference Guide.

Requestor

- [Request VIS Invite](#)

Checker

- [Check and Approve Request for VIS Invite](#)
- [Send VIS Invite](#)
- [Check and verify submitted VIS](#)
- [Enroll vendor in VENRO](#)
- [Modify/cancel a request](#)

Vendor

- [Submit Vendor Information Sheet](#)

Evaluator

- [Execute evaluation](#)

Approver

- [Approve enrollment](#)

For Vendor enrollment-related concerns, you may contact the following:

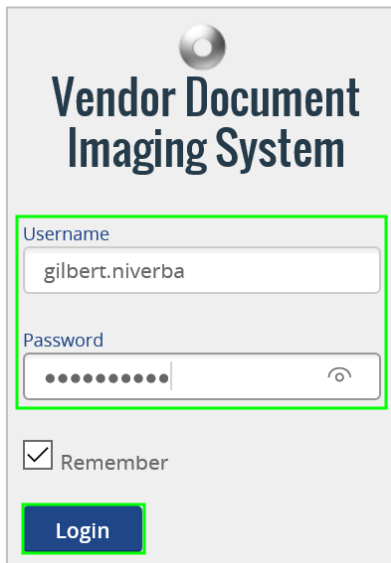
- **Mr. Daniel Joseph Dela Cruz**, Systems Analyst
daniel.delacruz@smsupermall.com
- **Ms. Cecile Faustino**, Assistant Vice President, Systems
cecile.faustino@smsupermall.com

Requestor:

Request for VIS Invite (*Optional*)

Perform the following to Request for VIS Invite.

1. Go to the Vendor DIS site at <http://wf.sm.ph/vendoris>.
2. Log-in using your **Active Directory (AD) username and password**.

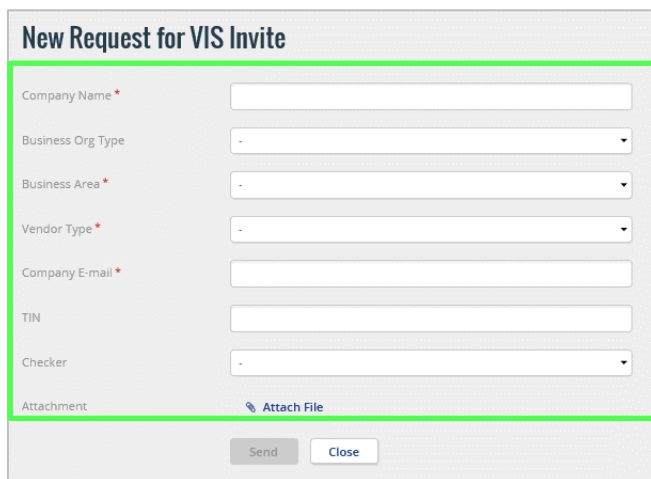


The login form for the Vendor Document Imaging System. It features a header with the system name and a circular logo. Below the header are two input fields: 'Username' with the text 'gilbert.niverba' and 'Password' with masked characters. A 'Remember' checkbox is located below the password field. At the bottom is a blue 'Login' button.

3. Fill out the **New Request for VIS Invite** form. Indicate the vendor **Company Name**, **Business Org Type**, **Business Area**, **Vendor Type**, **Company E-mail**, **TIN**, **Checker**, and other documents (via **Attachment**) in the corresponding boxes.

Note The **Attachment** field is not a required field.

4. Click **Send**



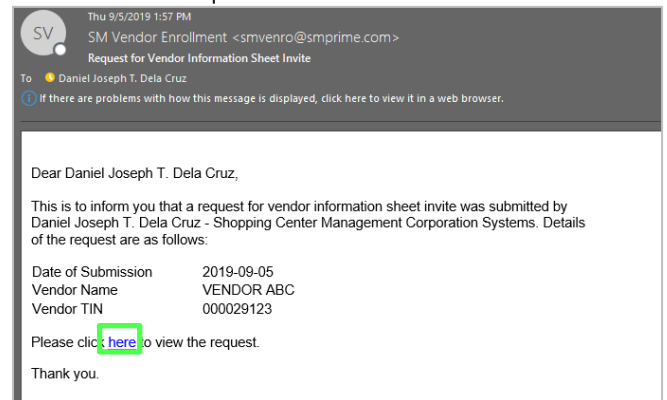
The 'New Request for VIS Invite' form. It contains several input fields and dropdown menus: 'Company Name', 'Business Org Type', 'Business Area', 'Vendor Type', 'Company E-mail', 'TIN', 'Checker', and 'Attachment' (with an 'Attach File' link). At the bottom are 'Send' and 'Close' buttons.

Checker:

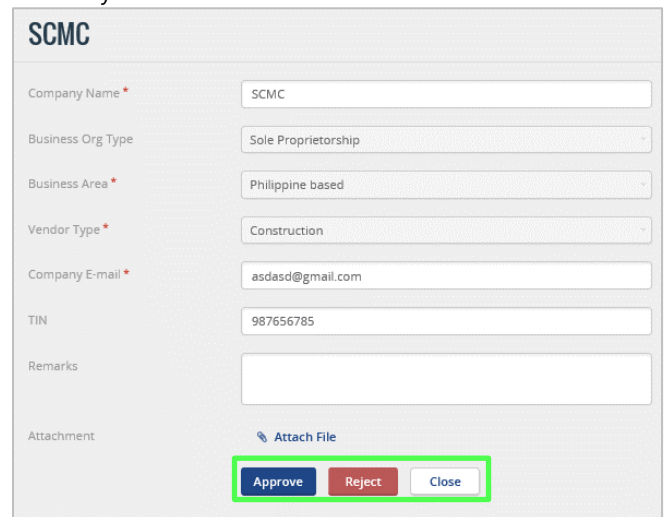
Check and approve request for VIS Invite

Perform the following to approve a VIS Invite request.

1. In the e-mail notification that you received, click the **Link** to view the request.



2. Check the details and **Approve** or **Reject** the request as necessary.



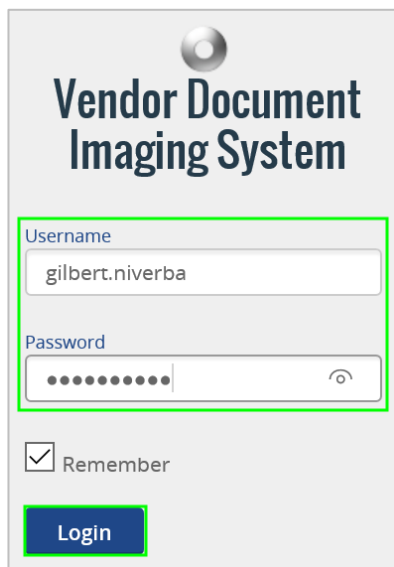
The 'SCMC' request details form. It displays the same information as the 'New Request for VIS Invite' form, including company name, business details, and contact information. At the bottom, there are 'Approve', 'Reject', and 'Close' buttons.

Note If you are rejecting the request, you are required to enter the reason why you are rejecting the request in the **Remarks** field.

Checker: Send VIS Invite

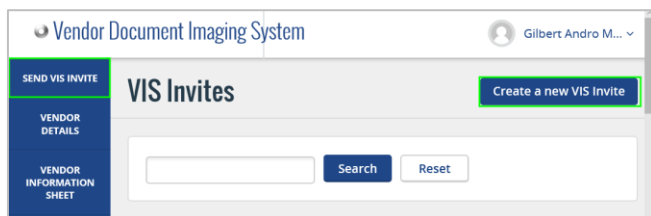
Perform the following to send a VIS Invite to an inquiring vendor of SM.

1. Go to the Vendor DIS site at <http://wf.sm.ph/vendordis>.
2. Log-in using your **Active Directory (AD) username and password**.



The login screen for the Vendor Document Imaging System. It features a header with the system name and a logo. Below the header, there are two input fields: 'Username' with the text 'gilbert.niverba' and 'Password' with a masked password '.....'. A 'Remember' checkbox is checked. At the bottom, there is a 'Login' button.

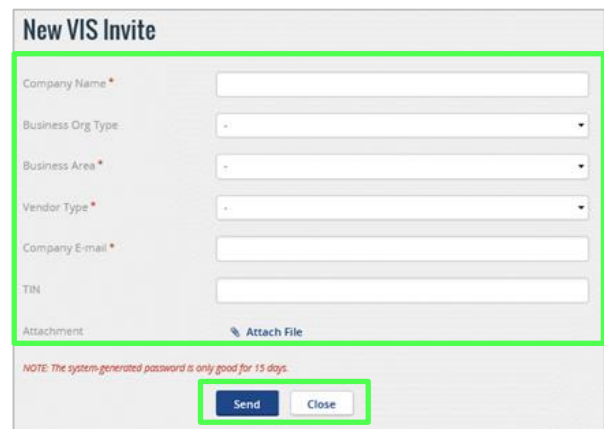
3. In the left navigation bar, click **Send VIS Invite**.
4. In the screen that appears, on the upper-right portion, click **Create a new VIS Invite**.



The main menu of the Vendor Document Imaging System. It shows the user's name 'Gilbert Andro M...' in the top right. The left navigation bar has three items: 'SEND VIS INVITE' (highlighted), 'VENDOR DETAILS', and 'VENDOR INFORMATION SHEET'. The main content area is titled 'VIS Invites' and contains a 'Create a new VIS Invite' button, a search bar, and 'Search' and 'Reset' buttons.

5. Enter necessary vendor information into the form.

a

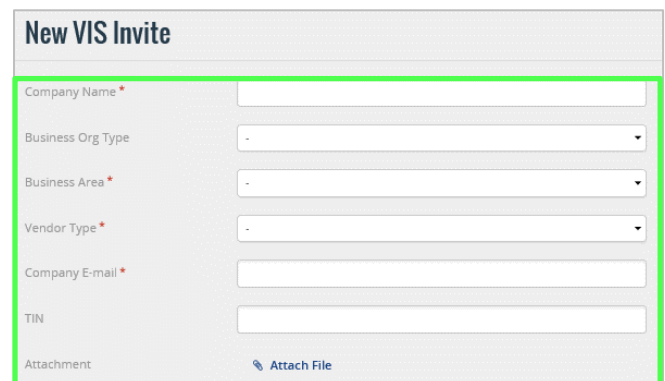


The 'New VIS Invite' form. It contains several fields: 'Company Name' (text input), 'Business Org Type' (dropdown), 'Business Area' (dropdown), 'Vendor Type' (dropdown), 'Company E-mail' (text input), 'TIN' (text input), and 'Attachment' (with an 'Attach File' button). A note at the bottom states: 'NOTE: The system-generated password is only good for 15 days.' Below the note are 'Send' and 'Close' buttons.

b

a Fill out the New VIS Invite form

Indicate the vendor **Company Name**, **Business Org Type**, **Business Area**, **Vendor Type**, **Company E-mail**, **TIN**, and **Attachment** in the corresponding boxes.



The 'New VIS Invite' form, identical to the one in the previous block, showing the fields for vendor information.

b Click Send

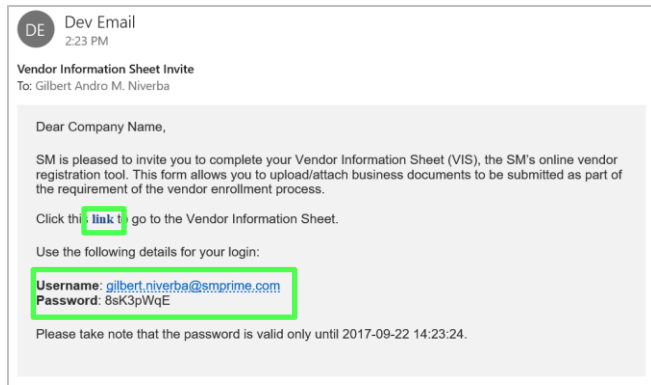


A close-up of the 'Send' and 'Cancel' buttons at the bottom of the form.

Vendor: Submit Vendor Information Sheet

Perform the following if you received a Vendor DIS e-mail notification with Subject **Vendor Information Sheet Invite**.

1. In the e-mail notification that you received, click the **Link** for going to the Vendor Information Sheet.



2. Log-in to the Vendor DIS site using the **Username** and **Password** indicated in the email that you received.

Note The system-generated password is only valid for 15 days.

The corresponding form for submission appears (shown on the right).

3. Fill-out the necessary sections of the form.

a Fill-out the Vendor Information section

Indicate necessary vendor information in the corresponding boxes.

VENDOR INFORMATION

Date: 2017-09-19

Business Area *: Philippine based Business Org Type *: Sole Proprietorship

Vendor Type *: Non-Construction

Company Name *: My Company Name

Company Address *: 123 A St., Malate

City *: Manila

Country *: Philippines

Nature Of Business / Industry *: Retail Goods / Service: Goods and Services

TIN *: 987654321

E-mail Address *: gilbert.niverba@smprime.com

E-mail Address 2 *: annie.publico@smprime.com

c Fill-out the Contact Person section

Indicate necessary Contact Person information in the corresponding boxes.

CONTACT PERSON

Position *: President

Name *: Gilbert Niverba

Contact Number *: (+63) 2 1234567

NOTE: Should contain Country Code and Area Code. (Example Format: (+63) 2 862-XXXX)

Payment Terms *: 30 Days

Bank Name *: BDO

Bank Account *: 123456789

Account Holder's Name *: Gilbert Niverba

b Fill-out the Company Contact Information section

Indicate necessary Company Contact information in the corresponding boxes.

COMPANY CONTACT INFORMATION

Landline Number *: (+63) 2 1234567

NOTE: Should contain Country Code and Area Code. (Example Format: (+63) 2 862-XXXX)

Mobile Number *: (+63) 2 1234567

NOTE: Should contain Country Code and Area Code. (Example Format: (+63) 2 862-XXXX)

Fax Number: (+63) 2 1234567

NOTE: Should contain Country Code and Area Code. (Example Format: (+63) 2 862-XXXX)

Note Numbers should contain Country Code and Area Code (e.g., (+63) 2 (862-xxxx))

d Upload required business documents

Attach required business documents onto the form by clicking **Attach File** beside the corresponding form.

REQUIRED BUSINESS DOCUMENTS

NOTE: Documents to be uploaded should be in PDF format only.

DOCUMENT	FILENAME
BIR COR	Attach File
Photocopy of latest version of Official Receipt and/or Sales Invoice	Attach File
Business Permit	Attach File
DTI Certificate of Registration	Attach File
Certification from Regulatory Body, if applicable	Attach File

In the dialog box that appears, click **Choose File** to browse for the file that you want to upload from your computer, and then click **Upload**.

You may also be required to provide additional documents that are not in the Standard List of Requirements. You may attach this onto the form by selecting **Add Other Document** under **Other Documents**.

OTHER DOCUMENTS

Add Other Document

DOCUMENT	ATTACHMENTS
No other documents to show...	

e Answer the Questionnaire section

f Save the form

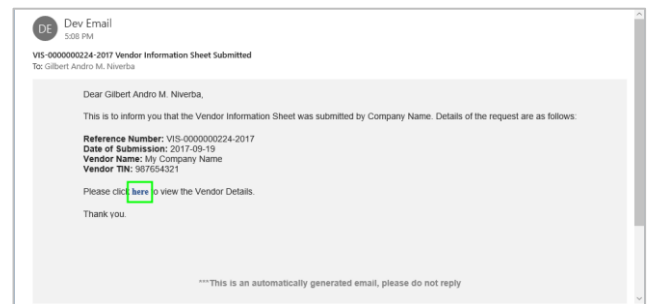
Select the **Agree** checkbox to signify that you agree to the listed Terms and Conditions, and then click **Submit**.

- The confirmation page appears. You will also receive an email notification after successful submissions of the VIS.

Checker: Check and verify submitted VIS

Perform the following if you received a Vendor DIS e-mail notification with Subject **Vendor Information Sheet Submitted**.

- In the e-mail notification that you received, click the **Link** for viewing the vendor details.



The corresponding Vendor Information Sheet appears (shown on right).

- If the Vendor Information is complete and correct, click **Approve** and proceed to the next section: **Enroll Vendor in VENRO**.

* Take note of the VIS Reference Number

Otherwise, continue to step 3.

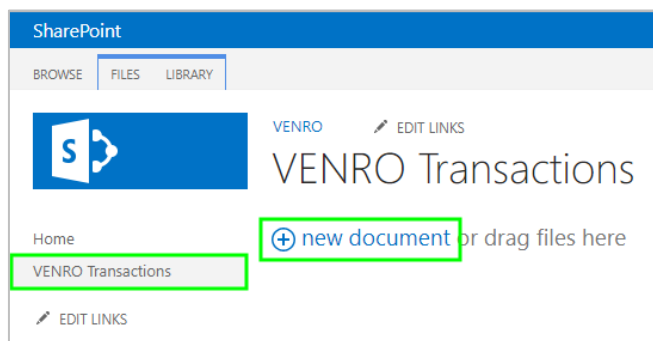
- Inform the vendor to submit additional documents via email. Return the VIS to Vendor by clicking **Return to Vendor**.

Note: Indicate in the remarks field the reason for Vendor's modification of VIS.

Checker: Enroll vendor in VENRO

Perform the following after all vendor requirements are completed in the Vendor DIS.

1. Go to the VENRO site at <http://wf.sm.ph/venro>.
2. In the left navigation bar, click **VENRO Transactions**.
3. Click **New Document**. A VENRO form appears.



4. Enter necessary information into the form (shown on the right).

a Type the VIS Reference Number

Type the **VIS Reference Number** in the corresponding box (from Step 2 of **Check and verify submitted VIS** section), and then click **Query Details**. Vendor details are automatically displayed in the corresponding boxes.

REGISTRATION OF APPLICATION		
VIS Reference Number :	VIS-00000025-2017	Query Details
		Clear Details

b Indicate details about the vendor

Fill-out necessary boxes in the Vendor Data, Vendor Bank Details, Vendor Category, and Vendor Document Imaging System sections of the form.

GENERAL DATA	
Search Term :	
Title :	
Vendor Name :	MY COMPANY NAME
Vendor Class :	Sole Proprietorship
Vendor Type :	
Tax Identification Number :	987654321

Vendor Enrollment			
Reference Number :			
Process Status :			
Request Date :		9/20/2017	
REGISTRATION			
REGISTRATION OF APPLICATION			
VIS Reference Number :	VIS-00000025-2017	Query Details	Clear Details
GENERAL DATA			
VENDOR DATA			
Search Term :			
Title :			
Vendor Name :	MY COMPANY NAME		
Vendor Class :	Sole Proprietorship		
Vendor Type :			
Tax Identification Number :	987654321		
Nature of Business/Industry :	RETAIL		
Address :	123 A ST., MALATE		
City :	MANILA		
Country :	PHILIPPINES		
Telephone Number :	(+63) 2 1234567		
Fax Number :	(+63) 2 1234567		
Email 1 :	gilbert.niverba@smprime.com		
Email 2 :	annie.publico@smprime.com		
Contact Person :	GILBERT NIVERBA		
Position :	PRESIDENT		
Contact Number :	(+63) 2 1234567		
VENDOR BANK DETAILS			
Bank Account :	123456789		
Account Holder's Name :	GILBERT NIVERBA		
Payment Term :	30 Days		
VENDOR CATEGORY			
Company Code :			
Account Group :			
Purchasing Organization :			
VENDOR DOCUMENT IMAGING SYSTEM			
Link to Vendor Document Imaging System (VIS) :	https://smadev.smgph.com/VendorInformationSheet/VendorInformationSheetData.aspx?VendorInformationSheetId=10118		
Remarks/Notes :			
CHECKER			
Name :	Gilbert Andro M. Niverba		
Department :	Information Technology	Position Title :	Manager - IT
Mall/Branch :	Head Office	Company :	SM Prime Holdings, Inc.
REQUESTER			
Name :			
Department :		Position Title :	
Mall/Branch :		Company :	
EVALUATOR 1			
Name :			
Department :		Position Title :	
Mall/Branch :		Company :	
EVALUATOR 2			
Name :			
Department :		Position Title :	
Mall/Branch :		Company :	
APPROVER			
Name :			
Department :		Position Title :	
Mall/Branch :		Company :	
		Submit	Cancel

c Fill-out the Requester/Evaluator/ Approver sections

Type the **Active Directory (AD) names** of the necessary people for the request, and then click the **Check Names** icon to extract their details in Active Directory.

REQUESTER			
Name :	<input type="text" value="gilbert.niverba"/> 		
Department :	<input type="text" value="Information Technology"/>	Position Title :	<input type="text" value="Manager - IT"/>
Mall/Branch :	<input type="text" value="Head Office"/>	Company :	<input type="text" value="SM Prime Holdings, Inc."/>

Alternative Click the **People Picker (Address Book)** icon.
In the **Select People** dialog box that appears, search for the **Name** of the Approver, select the correct display name, and then click **OK**.

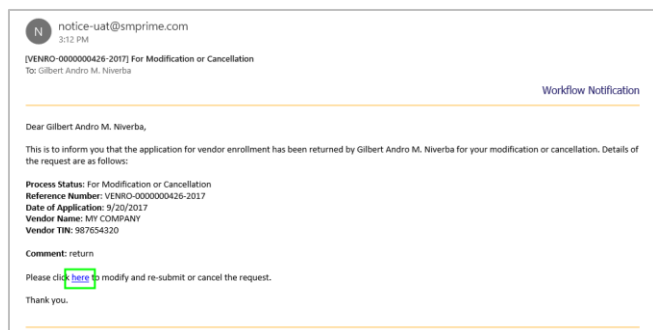
d Click Submit

<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>
---------------------------------------	---------------------------------------

Checker: Modify/cancel a request

If you received a VENRO email notification with the Subject **For Modification or Cancellation**, follow these steps:

1. In the e-mail notification that you received, click the **link** for responding to your task.



The corresponding Registration form appears (shown on the right).

a

a Modify the request

If you wish to modify the request, **modify the form** as necessary. Otherwise, click **Cancel** at the bottom of the form and proceed to step 2.

b Click Submit

When done modifying the form, click **Re-Submit**.

Re-Submit	Cancel
------------------	---------------

2. In the Task page that appears, select the desired **Outcome**, type a **Comment** as necessary in the corresponding box, and then click **OK**.

Outcome *

Select an outcome for this task.

☒ Re-Submit Application
☐ Cancel Request

Or you can [delegate](#) this task to another person.

Comment

Use this field to enter any comments regarding this task.

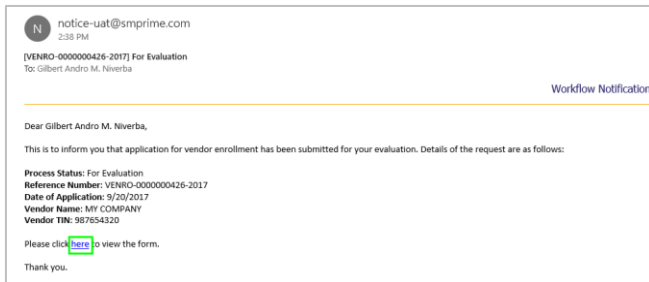
Vendor Enrollment		Reference Number : VENRO-000000426-2017
		Process Status : For Modification or Cancellation
		Request Date : 9/20/2017
REGISTRATION	WORKFLOW HISTORY	
REGISTRATION OF APPLICATION		
VIS Reference Number :	V/S-000000029-2017	Query Details Clear Details
GENERAL DATA		
VENDOR DATA		
Search Term :	MY COMPANY	
Title :	COMPANY	
Vendor Name :	MY COMPANY	
Vendor Class :	Sole Proprietorship	
Vendor Type :	Corporate FAS	
Tax Identification Number :	987654320	
Nature of Business/Industry :	RETAIL	
Address :	123 A ST., MALATE	
City :	MANILA	
Country :	PHILIPPINES	
Telephone Number :	(+63) 2 1234567	
Fax Number :	(+63) 2 1234567	
Email 1 :	gilbert.niverba@smprime.com	
Email 2 :	annie.publico@smprime.com	
Contact Person :	GILBERT NIVERBA	
Position :	PRESIDENT	
Contact Number :	(+63) 2 1234567	
VENDOR BANK DETAILS		
Bank Account :	123456789	
Account Holder's Name :	GILBERT NIVERBA	
Payment Term :	30 Days	
VENDOR CATEGORY		
Company Code :	1000 - SM INVESTMENTS CORP	
Account Group :	ZLOC - LOCAL VENDORS	
Purchasing Organization :	P200 - FAS-SCMC	
VENDOR DOCUMENT IMAGING SYSTEM		
Link to Vendor Document Imaging System (VIS) :	https://zmadex.smprime.com/VendorInformationSheet/VendorInformationSheetDetail.aspx?VendorInformationSheetId=10119	
Remarks/Notes :		
CHECKER		
Name :	Gilbert Andro M. Niverba	
Department :	Information Technology	Position Title : Manager - IT
Mall/Branch :	Head Office	Company : SM Prime Holdings, Inc.
REQUESTER		
Name :	Gilbert Andro M. Niverba	
Department :	Information Technology	Position Title : Manager - IT
Mall/Branch :	Head Office	Company : SM Prime Holdings, Inc.
EVALUATOR 1		
Name :	Gilbert Andro M. Niverba	
Department :	Information Technology	Position Title : Manager - IT
Mall/Branch :	Head Office	Company : SM Prime Holdings, Inc.
EVALUATOR 2		
Name :	Gilbert Andro M. Niverba	
Department :	Information Technology	Position Title : Manager - IT
Mall/Branch :	Head Office	Company : SM Prime Holdings, Inc.
APPROVER		
Name :	Gilbert Andro M. Niverba	
Department :	Information Technology	Position Title : Manager - IT
Mall/Branch :	Head Office	Company : SM Prime Holdings, Inc.
<input type="button" value="Re-Submit"/> <input type="button" value="Cancel"/>		

b

Evaluator: Execute Evaluation

If you received a VENRO email notification with the Subject **For Evaluation**, follow these steps:

1. In the e-mail notification that you received, click the **link** for viewing the form.



The corresponding Evaluation form appears.

Vendor Enrollment

Reference Number : VENRO-0000000426-2017
Process Status : For Evaluation
Request Date : 9/20/2017

REGISTRATION **EVALUATION** **WORKFLOW HISTORY**

INSTRUCTIONS:

1. For Financial Viability Criteria, the equivalent rates will be based on the computed ratio.
2. For Capability, Strategy, Innovation and Commercial Terms Criteria, each Criteria should be graded from 1 to 5. Equivalent rates are as follows:
 - 5 - Outstanding
 - 4 - Above Average
 - 3 - Fair
 - 2 - Below Average
 - 1 - Poor
3. Grade is computed as the product of Rate and the prescribed Weight.
4. Total Weighted Grade is the Total Grade per criteria.
5. For more than one Evaluator, Grade will be computed based on the average of the Total Weighted Grade by the Evaluators.

CRITERIA FOR EVALUATION

Vendor Type : Corporate FAS
Consultant

CONSULTANT

Criteria/Parameters	Evaluator 1				Weight	Grade (Rate x Weight)
	Assets	Liabilities	Ratio	Rate		
Financial Viability (10%)	Healthy Debt Level (Debt to Asset Ratio)	1	1	1.00	5%	0.10
	Liquidity Ratio (Current Ratio of the Asset and Liability)	1	1	1.00	5%	0.20
Capability, Strategy and Innovation (90%)	Corporate Structure (Basic management set up includes Human Resources (HR), Engineering, Contract Management, Safety and Admin)				20%	1.00
	Competitive and Experienced Key Personnel				25%	0.63
	Expertise in the Industry thru current client reference				25%	1.25
	Completed Projects				20%	1.00
TOTAL WEIGHTED GRADE :						4.80
EVALUATION RESULT :						Passed

Submit **Cancel**

a Select the Vendor Type *For Evaluator 1 only

Indicate if the vendor is a **Consultant**, **Agency Contractor**, or **Other Supplier**.

CRITERIA FOR EVALUATION

Vendor Type : Corporate FAS
Consultant
Consultant
Agency Contractor
Other Supplier

b Evaluate the Vendor based on the indicated criteria

Note The list of criteria for evaluation changes depending on the Vendor Type selected in Step a above.

CONSULTANT

Criteria/Parameters	Evaluator 1				Weight	Grade (Rate x Weight)
	Assets	Liabilities	Ratio	Rate		
Financial Viability (10%)	Healthy Debt Level (Debt to Asset Ratio)	1	1	1.00	5%	0.10
	Liquidity Ratio (Current Ratio of the Asset and Liability)	1	1	1.00	5%	0.20
Capability, Strategy and Innovation (90%)	Corporate Structure (Basic management set up includes Human Resources (HR), Engineering, Contract Management, Safety and Admin)				20%	1.00
	Competitive and Experienced Key Personnel				25%	0.63
	Expertise in the Industry thru current client reference				25%	1.25
	Completed Projects				20%	1.00
TOTAL WEIGHTED GRADE :						4.80
EVALUATION RESULT :						Passed

c Click Submit

Submit **Cancel**

2. In the Task page that appears, select the desired **Outcome**, type a **Comment** as necessary in the corresponding box, and then click **OK**.

Outcome *

Select an outcome for this task.

☒ Evaluation Completed
☐ Return Request

Or you can [delegate](#) this task to another person.

Comment

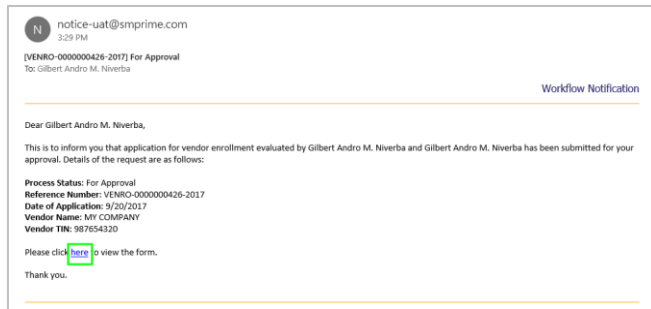
Use this field to enter any comments regarding this task.

OK **Cancel**

Approver: Approve Enrollment

If you received a VENRO email notification with the Subject **For Approval**, follow these steps:

1. In the e-mail notification that you received, click the **link** for viewing the form.



The corresponding Approval form appears.

a

b

The screenshot shows the "Vendor Enrollment" form with tabs for REGISTRATION, EVALUATION, APPROVAL, and WORKFLOW HISTORY. The APPROVAL tab is selected. The form contains a "Comments" section, an "Approval Link" section with a "Click here to insert a hyperlink" button, and a "Submit" button. The form is titled "APPROVAL OF ENROLLMENT".

- a Type a Comment or attach supporting file regarding approval

Type **Comments** as necessary in the corresponding box, or insert the direct URL to supporting documents by clicking **Click here to insert a hyperlink**.

The screenshot shows the "APPROVAL OF ENROLLMENT" form. The "Comments" section contains the word "Approved". The "Approval Link" section contains a "Click here to insert a hyperlink" button.

- b Click Submit

The screenshot shows two buttons: "Submit" and "Cancel".

2. In the Task page that appears, select the desired **Outcome**, type a **Comment** as necessary in the corresponding box, and then click **OK**.

The screenshot shows the "Task" page. The "Outcome" section has three radio buttons: "Enrollment Approved", "Enrollment Disapproved", and "Return Request". The "Enrollment Approved" option is selected. Below the "Outcome" section is a "Comment" section with a text area for entering comments. At the bottom right are "OK" and "Cancel" buttons.