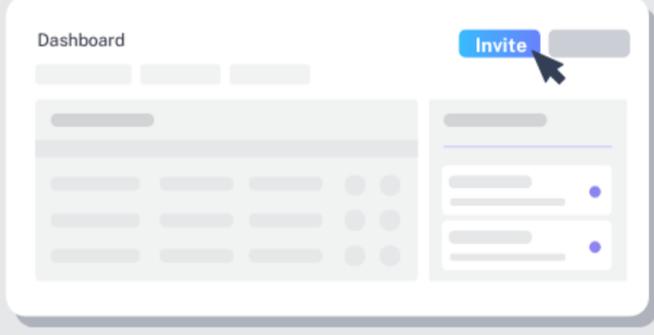# Invite a Supplier

❶ Inviting a supplier

Dashboard | Invite

You can invite suppliers to join TechPassport for the purposes of gathering information or sending them an NDA or POC contract.

From the dashboard, select the 'Invite Supplier' button on the top right.

This will open a pop-up box with two options. You do not have to complete both fields but can if you choose.

Supplier Email Address
If you would like to invite a specific contact from a vendor you already know, enter their email here. This sends an automatically generated email directly to the supplier letting them know that someone from your organisation has invited them to the platform. The TechPassport customer success team will follow up with the supplier to help them with their onboarding.

Supplier Website
If you have already done some research on a supplier but would like to invite them to the platform to capture the data we collect which is not generally publicly available, you can enter their website address. With this option, TechPassport will reach out individually to who we deem as the correct contact within the company and bring them on to the platform.

Following this, you can add a note to TechPassport about this supplier, such as a specific reason you would like to add them to the platform or details of a contact you may have had previous conversations with.
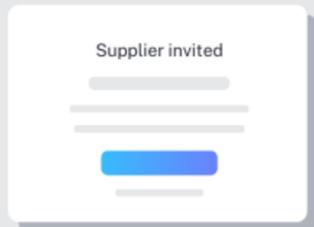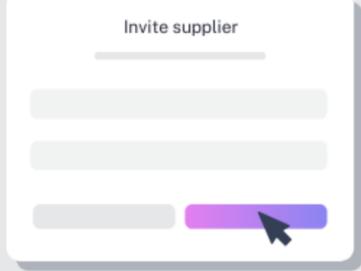
❷ Sending an NDA request

If inviting a vendor via email, you now have the opportunity to trigger an NDA as soon as they join the platform, eliminating the need to log back in and send the NDA once they have completed their onboarding.

After entering the supplier email, you will asked whether you would like to send them an NDA after onboarding. You can file this NDA under a company or individual project, or create a new project.
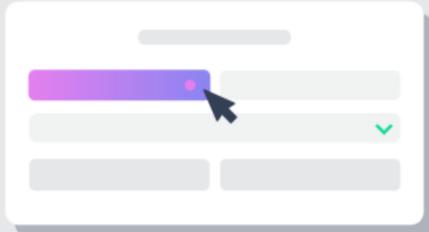
New projects

To create a new project fill in the following fields:
- Project name
  - Project ID – in this section you can create a project ID that aligns with your internal filing system in Salesforce or Ariba
- Tech MD sponsor (if applicable) - who from your organisation will be needed to approve this contract for signature? NB: this field is only shown for some organisations, depending on their setup preferences
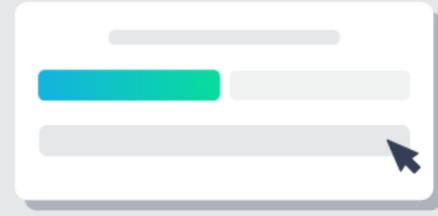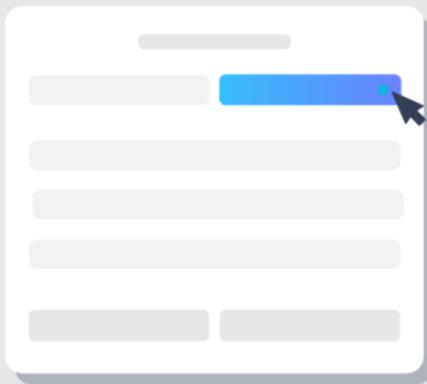
You can submit your NDA request on behalf of someone else from your company. Simply select 'yes' when prompted, and enter the name of who the request is on behalf of in the box that appears. If the request isn't on behalf of someone else, select 'no'.

Sending the request

At the end of the process, click 'finish' to send the NDA request. If you have requestor permissions on your profile a super user will have to approve the NDA before it is sent to the supplier.

The supplier will be sent a notification to let them know they have a contract to review. Once a super user has signed the NDA on the platform using our Docusign API, you will receive a notification to confirm it is complete.

See the 'request an NDA' user guide for more information about what happens once the NDA is signed by the vendor

❸ View sent invitations

Dashboard | View

You can view the invitations you have sent by clicking the 'view invitations' button on the dashboard.

The window shows the details of who you've invited, including the date the invitation was sent. It also shows the status of the invite:
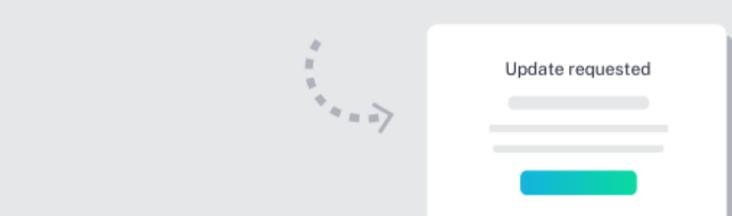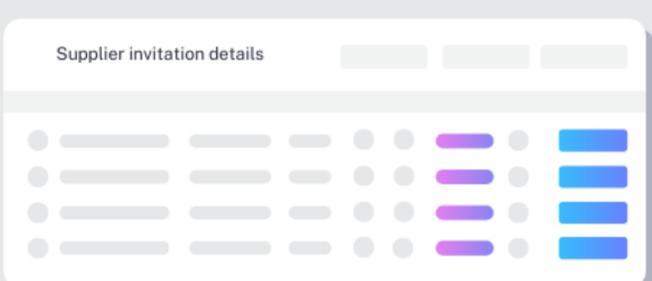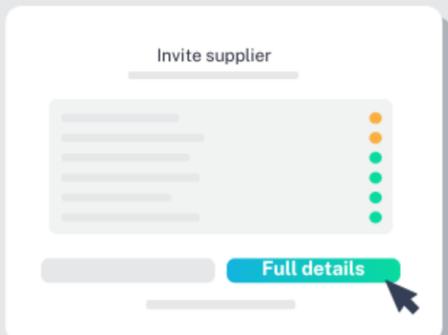
- 🟠 **Invited**
- 🟢 **Onboarded**
- 🔴 **Rejected**

The supplier invitation details page shows an in-depth view of sent invitations and can be filtered by status, type and date.

Regular TechPassport users will be able to see their own invitations, however users with higher permission levels will be able to see the invitations sent by everyone in their wider organisation.

The 'note from user' column shows the original comment you added when inviting the supplier. If you left this blank, the field will be blank too.

The TechPassport Supplier Liaison Team can leave a note in response to any sent invitations, and you can see those in the column here.

Updates

If an invited supplier has not yet joined or been rejected from the platform, and you'd like an update from TechPassport about the status of the invitation, you can click 'request update' and this will alert the TechPassport team. Once an update is requested, the button will be disabled for a set period of time to allow us to get back to you.

Next steps

The time it takes suppliers to join the platform after being invited can vary depending on a number of factors, but the average time to join is currently around one week.

When a supplier you have invited to TechPassport has successfully onboarded, you will receive a notification in the alerts panel. This includes a link to the new supplier product so you can easily view its details and request an NDA or POC directly in the platform.

If you would like an update on invited suppliers at any time, email teresa@techpassport.io