Supplier User Guide: Getting Started

Felix is the easiest way for you and your team to receive, manage, and respond to procurement requests from the South Burnett Regional Council.

This quick start guide will help you learn the basics of setting up and navigating your Felix account.

SOUTH BURNETT
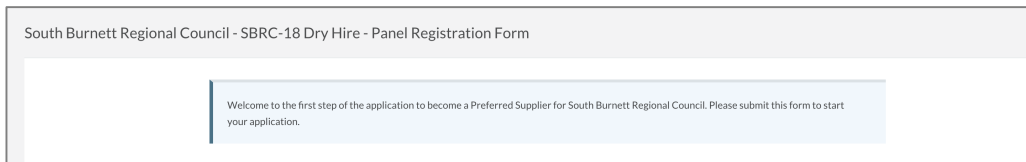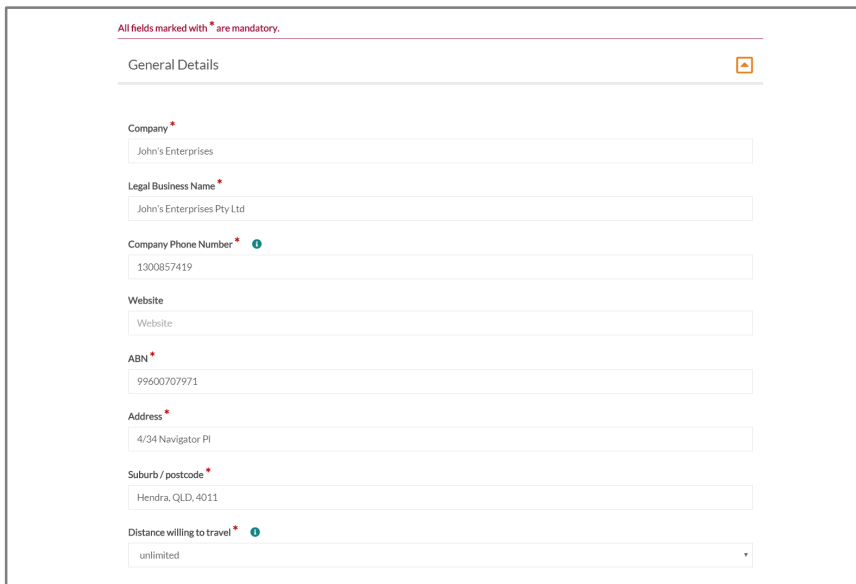REGIONAL COUNCIL

felix

Contents

1. Create A Felix Account

To respond to procurement opportunities from the South Burnett Regional Council, you must create a Felix account. Creating and using your Felix account is free.

1. Go to the LG tender box page which displays the details of the tender.

2. In the Description section, follow the prompts to the Felix public registration page.

3. You will be directed to the Panel Registration Form. The section at the top of the page will confirm the name of the client (South Burnett Regional Council) and the panel being tendered (for example, Dry Hire Arrangement).

South Burnett Regional Council - SBRC-18 Dry Hire - Panel Registration Form

Welcome to the first step of the application to become a Preferred Supplier for South Burnett Regional Council. Please submit this form to start your application.

4. Go to **General Details** and enter your company information.

All fields marked with * are mandatory.

General Details

Company *
John's Enterprises

Legal Business Name *
John's Enterprises Pty Ltd

Company Phone Number * ⓘ
1300857419

Website
Website

ABN *
99600707971

Address *
4/34 Navigator Pl

Suburb / postcode *
Hendra, QLD, 4011

Distance willing to travel * ⓘ
unlimited

5. Go to **Contact Details** and enter your contact information. This should be completed by the person who will be the primary contact for the Felix account as the email address provided will be used for login *and* ongoing platform communication.

Contact Details

Name *
John | Smith

Position
Office Manager

Mobile Number *
0400000000

Email *
john.smith@enterprises.com.au | john.smith@enterprises.com.au

6. Go to **Panel Documentation.** Download and review all relevant documents, then confirm you have read and agree to all documents by checking the tickboxes. You will not be able to proceed if any of these fields are left blank.

Project Services Panel Documentation

✓ Checking this box confirms you have received: TEN/0477 – TENDER PACK *

✓ Checking this box confirms you have received: FELIX HANDBOOK *

✓ Checking this box confirms you have read and agree to: FELIX TERMS AND CONDITIONS *

7. Go to **Terms & Conditions.** Download and review Felix's Terms & Conditions, then confirm you have read and agree to the document by checking the tickbox.

8. Select **Create Account**.

Terms & Conditions

✓ By checking this, you agree to our Felix Terms and Conditions *

Create Account

9. You will be automatically directed to the confirmation page for the Panel Registration Form. You have now created your Felix account. You will be sent an email from Felix (info@okfelix.com) to your nominated email address which provides the login information (username and password) for your account.
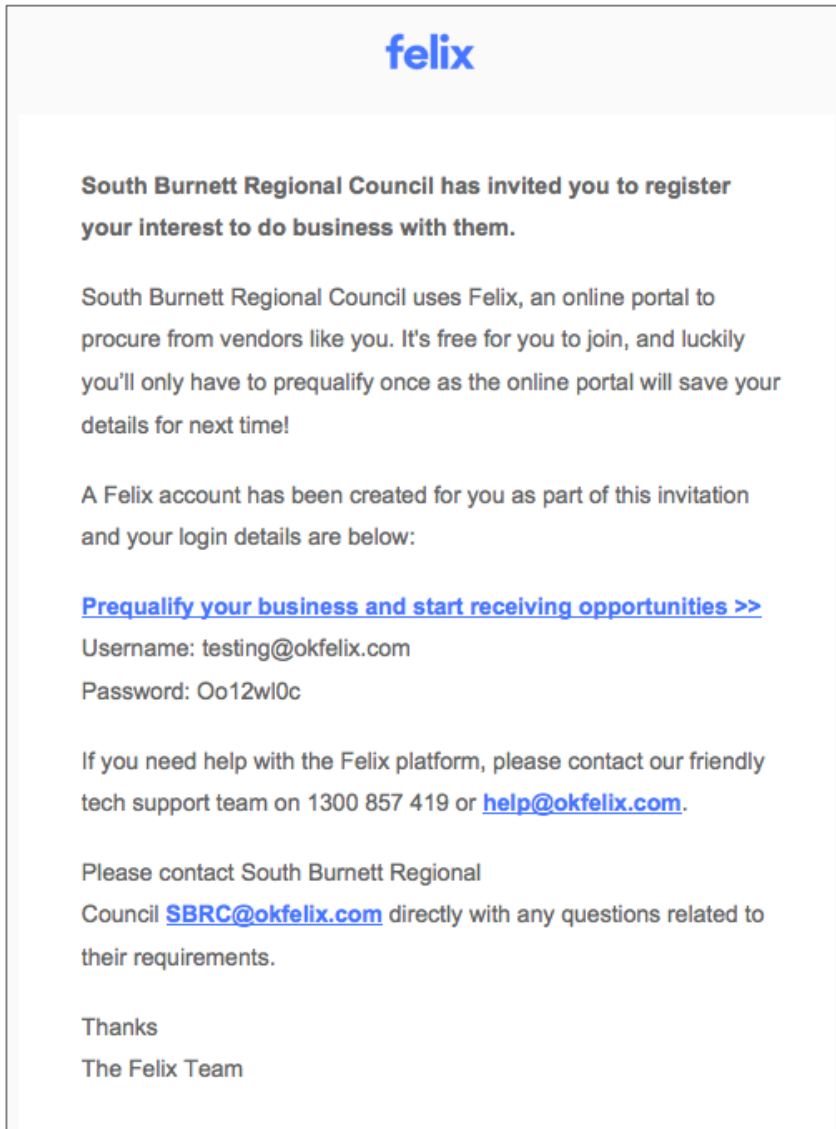
10. Now that you have created your account, you can login to Felix and submit your application for the panel. Please review the **Navigate your Account Dashboard**, **Supplier Details, Panel Selection, Compliance, Services, Standard Rates** and **Compliance Documents** instructions below.

2. Navigate Your Account Dashboard

1. Visit the login page: https://www.okfelix.com/login

2. Enter your email address and password, then click Sign In.

3. You will be directed to your Felix dashboard. This will display the progress of your Felix application for the South Burnett Regional Council. To submit your application, you must complete six sections:

   - **Supplier Details:** This section includes business and contact information.
   - **Panel Selection**: This section concerns the panel you are trying to join.
   - **Compliance**: This section includes the compliance questionnaire required to complete for the panel.
   - **Services:** This section allows you to add your services to the panel.
   - **Standard Rates:** This section allows you to add standard rates for your services.
   - **Compliance Documents:** This section allows you to upload any required licenses and insurances.
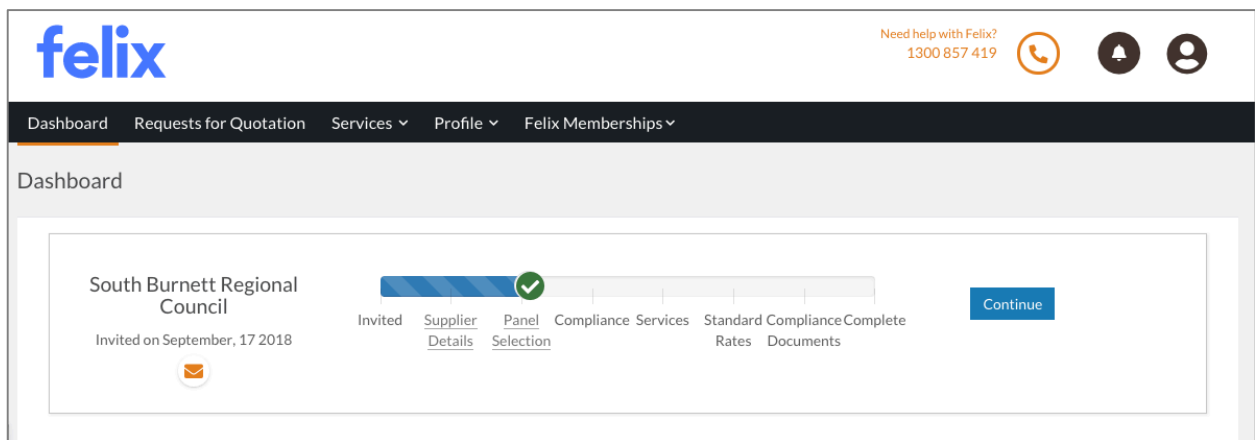
4. Once your application is successfully submitted, the South Burnett Regional Council overview in your Felix dashboard will show your **Complete** status.

3. Supplier Details

1. Go to the **Supplier Details** section of your application. The information that you provided in creating your account will be automatically populated in the Supplier Details section.

2. Review all tabs in this section and update any necessary information. This includes:

   - **Profile Details**: This section includes general business information (for example, ABN)
   - **Contact information:** This section includes the contact information of the account holder (for example, email address).
   - **Additional Contacts:** This section allows you to add other contacts to your account. An Additional Contact will receive every Request for Quotation notification via email and can submit your quote.
   - **Profile Description:** This section allows you to add a brief description about your company.
   - **Panel Documentation:** This section includes the documents related to the panel.

3. Select **Save** to save this information and return to it later.

4. Select **Proceed** to save this information and proceed to the next step of your application.

5. Click **Okay** to confirm

4. Panel Selection

1. Select the **Continue** button in your Felix dashboard to go to **Panel Selection** section of your application.

2. This screen will display which panel(s) that you are a member of.


3. If you are eligible to become a supplier for another panel(s), you can select **Join** to add this panel to your application.

4. Select **Save** to save this information and return to it later.

5. Select **Proceed** to save this information and proceed to the next step of your application.

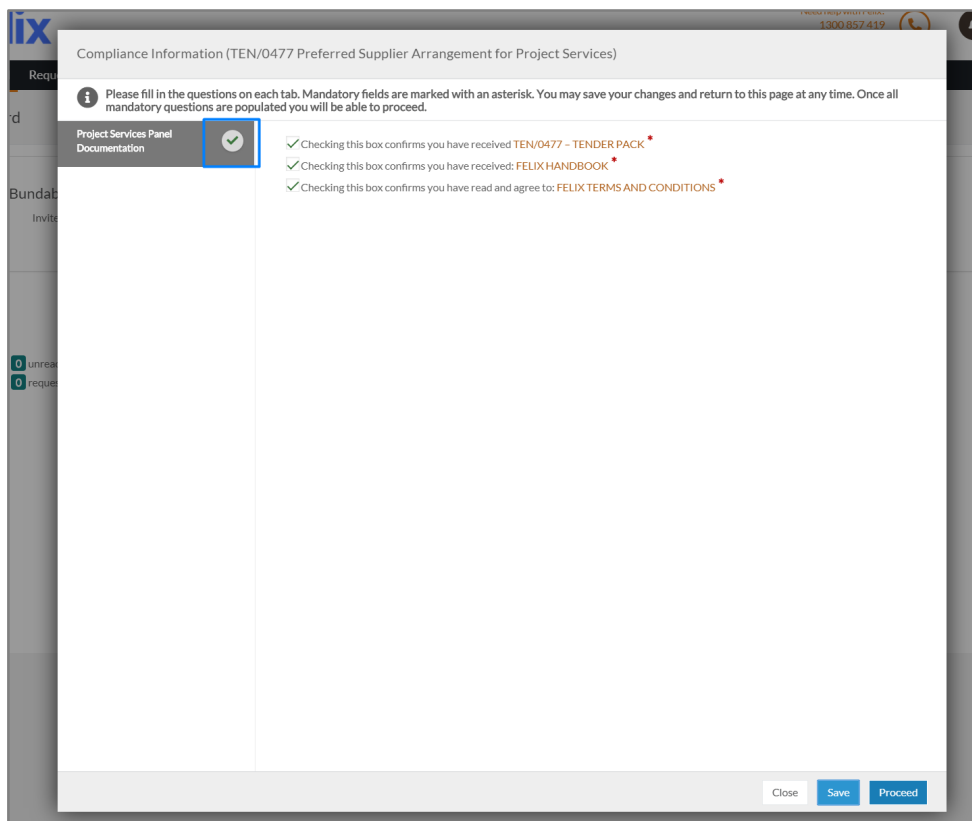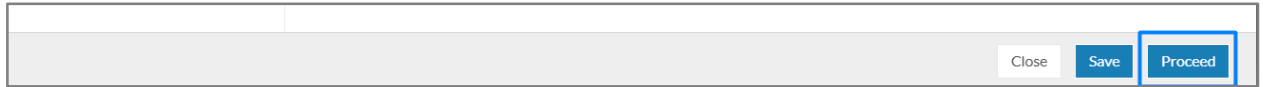
6. Click **Okay** to confirm.

5. Compliance

1. Select the **Continue** button in your Felix dashboard to go to the **Compliance** section of your application**.** The information that you provided in creating your account will be automatically populated in the applicable fields of this section.

2. Review all tabs and enter or update any necessary information. If you select "Yes" for a question, you may be asked to supply supporting information (for example, attach a copy of your WH&S policy).
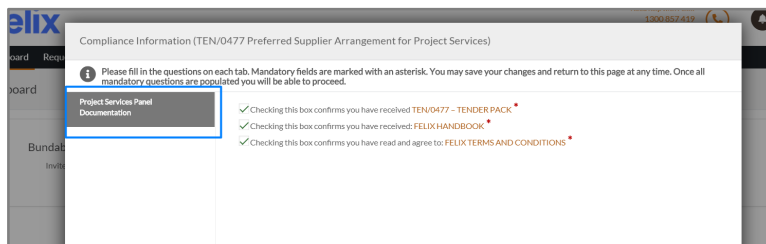
3. Click **Save** as you complete each tab. A green tick will appear next to the section heading if you have met all necessary requirements for that section.

4. When you have completed all sections, select **Proceed** to save this information and proceed to the next step of your application. This button will not appear if there is information still required in any tab.

5. Click **Okay** to confirm.

6. Services

1. Select the **Continue** button in your Felix dashboard to go to the **Services** section of your application**.**

2. There are three service categories: Hire Equipment, Trades or Products. Click the category related to your service. For example, select **Hire Equipment** if you would like to add an Excavator. Select **Trades** if you would like to add Security Services.
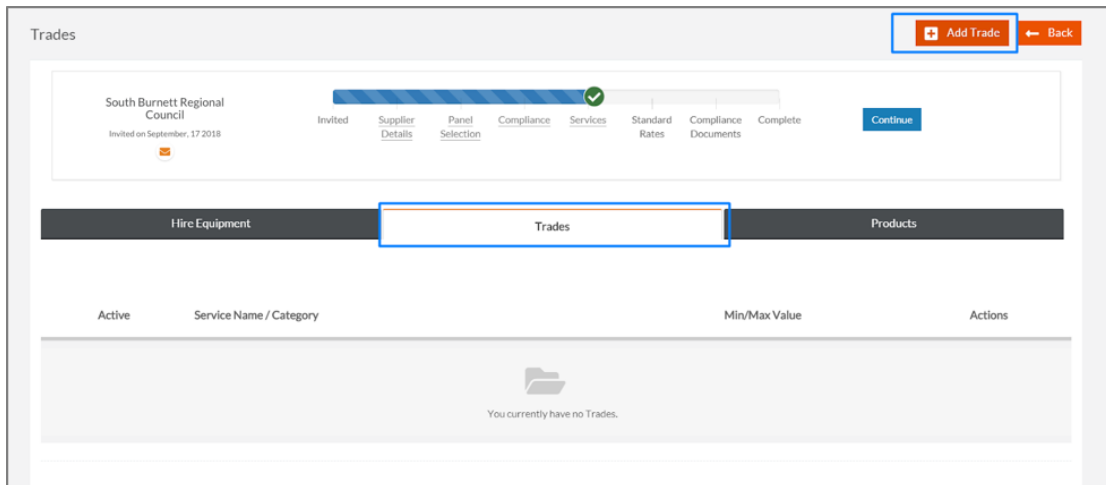
3. Select the **Add** button for your service.

4. Go to **Select Panel**. Confirm that you are adding the service to the relevant panel.

5. Go to **Filter**. You can use this section to select from a list of services, or you can type to find your own. Please note that you will only be able to add services that are relevant to the panel.

   1. Click the service type, then select the specific service. For example, select Crane and then tick Tower Crane.

2. Scroll to the bottom of the screen and indicate the Minimum Quantity, Hire Term or Value for the service. This setting is used to filter procurement requests. For example, if you have added Hire Equipment > Crane > Tower Crane and set the minimum hire term as seven (7) days, you will only match with procurement requests that have a hire term of at least seven (7) days.

3. Select **Add.**

6. You will be automatically directed to your list of services for that service category. You can edit each service item by selecting the **More > Edit** button under the Actions column.

7. Repeat step 2 - 5 for all services that you would like to add.

7. Standard Rates

1. If you have added Hire Equipment services or Products to your application, you will be asked to complete the Standard Rates section. Entering standard rates will give you the ability to specify set rates that are tailored to particular regions. The Standard Rates section is excluded from applications that only include Trades.

2. Select the **Continue** button in your Felix dashboard to go to the **Standard Rates** section of your application**.**

3. You can filter your list by Region (if applicable) or by Service Items.

4. Select the item and scroll to the **Edit** button in the last column of the table.

5. Enter your prices for all relevant fields.

6. Select **Save.**

7. There may be multiple regions included. If you would like to submit rates for all available regions, choose **All Regions** in the dropdown. To submit rates for a particular region only, choose the region from the dropdown list.

8. If you have selected All Regions, you can apply the same rate for service in all regions. Click **Update price for all regions**. Enter your default price in the popup box. Click **Submit** to save.

9. If you would like to apply the same price for all services, click the heading of the column. Enter this default price in the popup box. Click **Submit** to save.

8. Compliance Documents

1. Select the **Continue** button in your Felix dashboard to go to the **Compliance Document** section of your application**.**

2. Click the **Add** button.
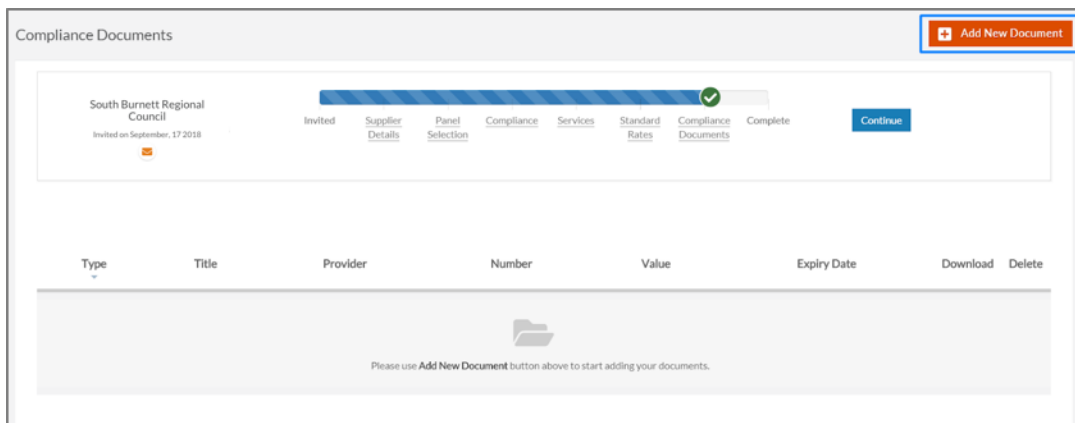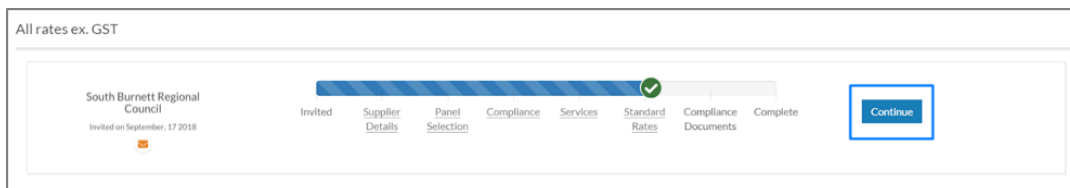
3. Select the **Compliance Document Type**. The types of documents required may differ depending on the panel. For example, it may include Licenses, Insurances, WorkCover Qld.
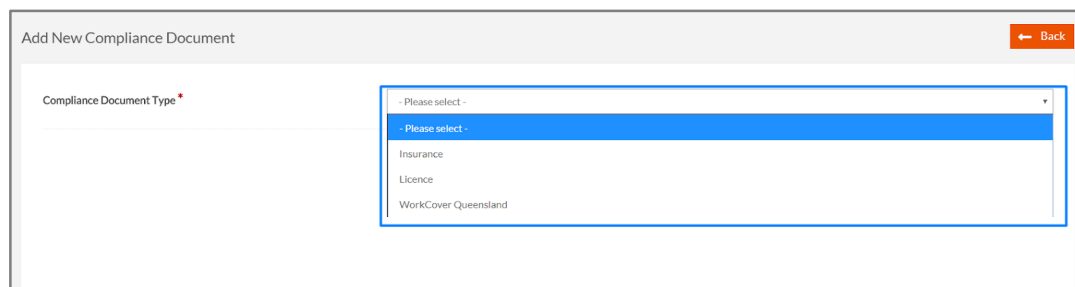
4. Enter all requested information for the document.

5. Select the **Save** button.

6. Repeat steps 2 - 5 for all relevant documents.

9. Submitting Your Application

1. Once you have completed and reviewed all stages of your application, select the **Submit Application** button in your Felix dashboard. It is important that your application includes all required information, as expired documents or missing details can affect your application.

2. Click **Yes** to confirm.

3. You will be directed to your Felix dashboard. This will display your **Complete** progress and **Pending Approval** status for your Felix application for the South Burnett Regional Council.

4. Your application will be reviewed by the South Burnett Regional Council procurement team. You will be notified via email, or by the Status bar in your Felix Dashboard, of the outcome of your application.

- **Approved:** You are now a preferred supplier for this panel.
- **Declined:** You may be declined if the information provided with your submission is insufficient. Please log into your account and hover over the Decline symbol to find out why. The notice will usually contain instructions on what steps you should take to rectify this. Follow the steps in the instructions and click Submit Application when your submission is ready for review by South Burnett Regional Council.
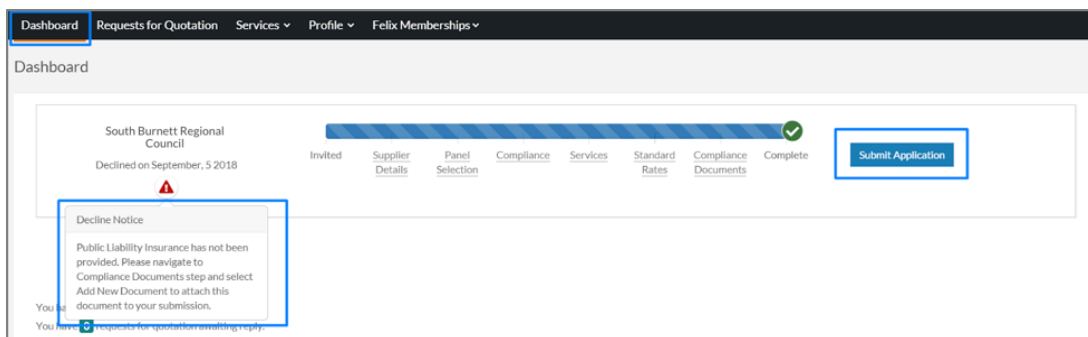
10. Frequently Asked Questions

Which browsers are supported by Felix?

To take advantage of all of Felix's features, you'll need to use one of the following supported web browsers when working in the Felix platform.

Windows-supported browsers
- Google Chrome (latest version)
- Mozilla Firefox (latest version)
- Microsoft Edge (latest version)
- Internet Explorer (latest version)

Mac-supported browsers
- Google Chrome (latest version)
- Safari (latest version)
- Mozilla Firefox (latest version)

Update your web browsers

It is best practice to keep your web browsers updated to the latest version to ensure that Felix pages and features render properly. To update Felix's supported browsers, take the steps in the following links:

- Google Chrome
- Mozilla Firefox
- Apple Safari
- Microsoft Edge

Why is the page not loading or producing an error page?

If page performance is slow or unresponsive, here are some possible fixes:

1. Ensure that are using the latest version of your web browser (see above).
2. Try refreshing the page in your web browser.
3. Try using a different web browser.

If the issue persists, contact the Felix support team with any screenshots and supporting details about the page, web browser, action you are trying to take.

Why am I not able to login to my account?

If you're unable to log into Felix, please try the following steps:

- Manually visit the login page https://www.okfelix.com/login and try to log in.
- Make sure that your browser is supported by Felix (see above).
- Check that there are no spaces before or after your email address in the login field.
- Ensure that you're using the email address associated with your Felix account.
- Reset your password.
- Clear the cache and cookies in your browser and retry.
- Try logging in from another network (e.g. from the mobile network on your smart phone) to see if the issue is network-related. If you are able to log in from another network, contact your IT department or network administrator.

How do I clear my browser cache?

When you experience an issue that is isolated to your computer and the browser you are using, you may need to clear your browser cache.

The process for clearing your cache is different in every browser. You can check to make sure your browser is supported by Felix above.

See links below to resources about how to clear your cache for all the major browsers. Please note that some variations to the tutorials below may apply

depending on your current version of the browser:

- [Google Chrome](#)
- [Safari](#)
- [Mozilla Firefox](#)
- [Internet Explorer](#)

After you have cleared your cache, be sure to completely restart your browser. This step ensures that the cache is completely cleared.

How do I reset my password when I am not logged in?

- Navigate to https://www.okfelix.com/forgot-password.
- Confirm your email address and then **Submit**.
- You will receive an email with a *Forgotten Password Verification* subject line. Open this email and click **Reset Your Password.**
- Enter your new password and click Save.
- You'll see a message that your password was set successfully. Now try to login at https://www.okfelix.com/login
- If you are unable to login, try the troubleshooting steps above.

How can I add users to my account?

If you are the primary contact in your Felix account, you can add and remove other contacts to your account.

Additional Contacts receive every RFQ notification via email and can submit your quote.

1. Navigate to **Profile > Edit Profile** from your Felix dashboard.
2. Click **Additional Contacts**.
3. Click **+ Add Contact.**
4. Complete the form.
5. Click **Add Contact** to send your user a welcome email and give them access to your account.

RFQ-Only Contacts can be forwarded RFQs from your account and submit your quote. They will receive the RFQ notification via email.

1. Navigate to **Profile > Edit Profile** from your Felix dashboard.
2. Click **Request for Quotation Contacts.**
3. Click **+ Add Contact.**
4. Complete the form.
5. Click **Add Contact** to send your user a welcome email and give them access to your account.

What steps can I take to ensure Felix emails get delivered to my inbox?

If Felix emails sent to you are resulting in bounces or ending up in the junk folder, please try the following steps:

- Navigate to **Profile > Edit Profile** from your Felix dashboard. Go to **Contact Details** and make sure that the email address you're using is the same as the one associated with your Felix account.
- Check your spam or junk folder. To help prevent future emails from Felix ending up in these folders, add info@okfelix.com to your Address Book or as a Contact in your email.
  - Please note that all platform emails are automatically sent from info@okfelix.com, however you should not reply to this address as it is not monitored. If you require help, please contact help@okfelix.com.
- Adjust your spam filter settings to improve deliverability. Most spam filters allow you to whitelist Felix as a sender by adding our domain. You can work with your IT team to make changes to your whitelist or "safe sender" list. If you're using a free email provider such as Gmail, you can find whitelisting instructions in their user documentation. To whitelist Felix as a sender, here is a complete list of addresses we use for internal email notifications such as RFQ notifications, messages, product updates:
  - info@okfelix.com
  - help@okfelix.com
  - updates@okfelix.com

When is the close date?

The close date will differ for each panel. Please read the tender documents for more information and contact BRC for more information.

Will signing up guarantee me any work?

No. The signup and approval process is only to pre-qualify your business. Work will still be awarded through standard competitive quoting.

I have all the requested information collated in one large document/folder. Where can I upload it?

You must upload individual documents into the separate fields. Leaving any mandatory fields blank will prevent you from being able to submit your application.

I have additional information I think you might be interested in. Where can I upload it?

South Burnett Regional Council will only assess requested information. Additional/irrelevant documents and data will be deleted. ZIP folders containing a collection of documents cannot be uploaded.

What type of files can I upload?

You can upload PDF, .docx, .doc, .xlsx, .xls, and .jpg.

Will other suppliers see what I submit?

No, your submission remains private.

Will any employee of the South Burnett Regional Council be able to see my submission?

No. Only selected and authorised users will have access to view your details.

I'm concerned that I won't be able to get my submission completed properly or on time.

Contact the Felix support team on 1300 857 419.

11. Get in Touch

Felix
1300 857 419
help@okfelix.com
4/34 Navigator Place
Hendra QLD 4011

Felix has a dedicated support team based in Brisbane that will help ensure that your issue is resolved efficiently. If any questions or technical issues come up while you're using Felix, you can get help or support via the **Need Help** button in your account. You can also contact Felix support directly on **1300 857 419** during 8AM - 5PM Monday - Friday or email **help@okfelix.com** with an overview of your problem and a longer description of the issue you're experiencing.

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