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Quick Start Guide

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emerio™

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Creating a Service Profile

To bid on projects that interest you, you must create a Service Profile in those project categories. You may create a different profile for each category that interests you.

To create a Service Profile:

1 Click My Emerio in the navigation bar.

2 Enter your username and password and click Login.

3 Click the Edit your Profile link.

Creating a different profile for each category allows you to promote a different marketing message and provide samples of your work that are tailored to the target category.

4 Click Create New Profile.

5 Select from the Category pull-down menu the main category for this profile, then click Continue.

6 Select the check boxes for the subcategories for this profile.

7 Enter the general information about your company.

You must enter the name of your company, number of employees in your company, the year your company was founded, and headquarters location.

You may also provide a company overview, other office locations and your D-U-N-S® number.

A D&B® D-U-N-S® Number is a unique nine-digit sequence recognized as the universal standard for identifying and keeping track of over 70 million businesses worldwide. Why should you have a D-U-N-S Number?

• It enhances the credibility of your business in the marketplace
• It enables potential customers, suppliers and lenders to easily identify and learn about your company
• The U.S. government and many major corporations require their suppliers and contractors to have a D-U-N-S Number
If you don't have one, you can get it free from www.dnb.com.

8 Enter a description of the services your company offers. You may also provide a list of clients and alliances, and your standard business terms.

9 Upload your logo; this image will be displayed on your profile. If you want, provide a caption for the logo such as your company name.

Your logo must be either jpg or gif image formats to be compatible with the emerio system. You logo size is limited to a physical size of 320 x 120 pixels and may not contain URLs, email addresses, or other contact information. Your thumbnail size is limited to a physical size of 40x50 pixels and must conform to the other conditions stated above.

You can also upload a thumbnail image of your logo to help your profile stand out in the Emerio directory. This thumbnail image is displayed next to your profile summary on the category pages for Select providers, search results and directory listings.

10 If you would like to enter professional references, click Go to References and enter your references.

11 Click Update Profile when you are finished.
You may provide additional information such as:
- Certifications
- Licenses
- Education
- and Employment

You may update or add information to your profile at any time by clicking Edit Profile from My Emerio.

Creating a Portfolio

Emerio recommends that you upload samples of your work to the Portfolio section of your Service Profile.

A comprehensive portfolio is especially important for service categories such as Graphic Design & Multimedia, Web Design & Development and Writing & Translation.

To create your portfolio:

1 Click Edit Your Profile in My Emerio.
2 Click the Portfolio link on the profile you want to create a portfolio for.
3 Click Upload.
4 In the *Upload* dialog box:

> A Click Browse to navigate your computer for the file you want to upload. Double click on the file icon to select it.
> B Once selected, the file name will appear in the Select a file area in the dialog box.
> C Click Attach File. After a few seconds, the filename will appear at the bottom of the dialog box.

5 When you are done, click Finish Uploading Close Window.

6 If you have a thumbnail image of the file or an icon to represent the file, click Upload next to Add a Thumbnail Image. This task is optional, the image is displayed when a buyer looks at your portfolio. If you do not upload your own thumbnail image, Emerio will display a default image.

7 Add a caption that describes the sample of work, for example "E-commerce website."

8 Click Add The Above Portfolio Item.

9 Repeat the steps 3-7 to upload additional files.

10 When you are finished adding files, click Save Portfolio Items and Quit. It may take up to an hour for your files to be displayed in your portfolio.

Getting Projects

After you have created your service profile, you can start bidding on projects.
Access projects by browsing the project marketplace or by receiving invitations from buyers to bid on projects.

To browse projects

1 Click **My Emerio,** then click the *View all Projects* link at the bottom of the page.
2 You can browse projects by:
3 Click the project name to view the project description.

Scrolling through the projects.
Browsing a category by clicking a category link.
Using filters to view projects that meet your criteria.

Getting Alerted

Receiving New Project Email Alerts

In addition to actively browsing Emerio Online for projects, you can also sign up to receive daily email notification of projects in your categories of interest.
To sign up for New Project Alerts:

1 Click My Emerio Preferences Email Notifications Project Notices.

2 Select the categories in which you want to bid. You will receive a daily email containing links to projects posted in the categories that you select. Hold down the CTRL key to select multiple categories. If you select a category by mistake, while still holding the CTRL key, click on it again to remove the highlighting and deselect it.

3 Click Continue.

Receiving Invitations to Bid
Buyers may also invite you to bid on their projects. When this happens, the following will occur:

- You will receive an email notification that you have been invited to bid
- The project will appear in the Invited to Bid tab within My Emerio Selling Activity

To review and bid on projects to which you are invited:

1 Click My Emerio Selling Activity Invited to Bid.

2 Click the project name to view the project description and any uploads related to the project.

Screening Projects

When you find a project that interests you, Emerio recommends that you review the buyer's Emerio buying history. Emerio also recommends that you try to clarify the project requirements before you bid by posting questions for the buyer to the Project Clarification Board.

To review the buyer's Emerio buying history:

1 On the Project Description page, you can:

View the buyer's history.
View the buyer's feedback.
View the buyer's feedback for others.

2 Review the number of Emerio projects posted by the buyer and the number awarded.

For a buyer to use Emerio's Billing & Payment system to pay you, they must first authenticate their credit card. You will know if a buyer has done this if the Billing and Payment System confirmed icon appears near their username.

Be wary of buyers who have posted many projects but have never awarded them on Emerio. They may not be serious about hiring a service provider.

Getting More Information

After reviewing the project description and the buyer's history on Emerio, you may have questions about the project requirements. You can ask these questions by posting messages to the Project Clarification Board. The Project Clarification Board is a public forum for service providers to ask questions about a project. Buyers may respond here to the questions as well.
To post a question on the Project Clarification Board:

1 On the Project Description, click the View link in the Project Clarification Board box.

2 In the Project Clarification Board dialog box, enter your question and click Post Message. Post only questions about the project requirements.

The buyer is notified of your question and can post a response on the board or update the project description.

Placing Bids

After you have reviewed the project, you are ready to bid:

To place a bid:

1 Click Place Your Bid on the Project Description page.
2 Complete the bidding form, including your bid amount. In your bid proposal summary describe your relevant experience, qualifications, and what value you will bring to the project.
3 Click File Upload to upload a more detailed proposal.
4 Indicate the amount of time you need to deliver the project.
5 Click Preview My Bid.
6 Review your bid, then click Submit.

Once you submit your bid, the project will move into the Bidding Open tab in My Emerio Selling Activity. You can view your bid at any time by clicking Selling Activity Bidding Open, then click the project name link.

Getting More Information

Emerio does not permit direct communication with the buyer while the bidding is open. Instead, the buyer may communicate with you via the Private Message Board (PMB). After you submit your bid, the buyer may decide to open a Private Message Board with you to discuss the project in more detail.

When this happens, the following will occur:

• You will receive an email notification
• A message board icon will appear next to your bid
To respond to the buyer's Private Message Board questions, you can:
• Reply to the email notification you receive from Emerio. Simply follow the instructions in the email to reply. Your response will automatically be posted to the Private Message Board on Emerio
• Post your message directly on Emerio.

To post your message on Emerio

1 Click My Emerio Selling Activity Bidding Open.
2 Click the Message Board icon in the far right column, labeled Message.
3 In the message dialog box, enter your reply and click Post Message.

Winning the Bid

Agreeing on the Terms

If the buyer selects your bid, the following will occur:

• You will receive an email notification about being selected
• The project will move to the Bidding Closed tab in Selling Activity
• The project's status in Selling Activity will change to "You're Selected!"

You must then accept the project on Emerio before you can begin work. Before you accept the project, you have the opportunity to clarify project requirements, define key milestones and confirm your bid amount by using the Business Terms process.

Accepting the Project

To accept the project:

1 Click My Emerio Selling Activity Bidding Closed Accept Project.

2 Review the Emerio Terms and Conditions, which require that you send all invoices through Emerio and pay the Emerio transaction fee.

3 If you do not need to modify your Business Terms, click Accept Project. Once you've accepted the project, the following will occur:

• The buyer will be notified that you accepted the project.
• The project will move into the Accepted Projects tab in Selling Activity.
• The buyer's email address will appear next to the project name in Selling Activity Accepted Projects.

4 If you would like to modify your Business Terms before you accept the project, click Modify Business Terms.

5 Review the original Project and Bid Details.

6 If you would like to upload a detailed Statement of Work that specifies the project requirements and end deliverables, click Browse to find the file on your computer and upload it.

7 Define key milestones, their deadlines, and the payment amount due at each milestone.
• The Final Amount field will automatically be calculated based on the sum of the milestone amounts you enter.

The new Final Amount cannot be less than the original bid amount. If your bid amount decreases, you will need to fill out a Transaction Fee and Bid Adjustment Form, available on your Emerio Account page.

• If you want to update your total bid amount, but do not have multiple milestones for the project, just enter a "New bid amount" in the first milestone field and the new amount in the Amount field. The Final Amount will then reflect only that one amount.

8 Click Preview to review your changes, then click Submit on the Preview page to submit your changes to the buyer.

Once you submit the modified Business Terms, the buyer will be notified and will either modify the Terms again or accept your changes. You can communicate via the Private Message Board to discuss the changes. If the buyer modifies the Business Terms again, you will be notified and can also either accept the buyer's changes or make further modifications. Once both parties accept the modified Business Terms, the project will move to the Accepted Projects tab in My Emerio Selling Activity, and you can begin work.

Communicating with the Buyer

Communicating with the Buyer privately (after project acceptance)

Once you have accepted the project, you can contact the buyer directly to discuss the project and begin work. You can communicate in any of the following ways:

• Via Emerio, through the Emerio Private Message Board (recommended in order to keep a written record of communication)

• Directly, via email, phone, Instant Messenger, etc.
Emerio recommends that you request full contact information upon project acceptance.

Delivering Your Work

When you have completed the project, you may deliver your files or work product via the Emerio Private Message Board.
To access the Private Message Board:

1 Click My Emerio Selling Activity Accepted Projects
2 Click the Private Message Board icon next to the appropriate project
3 Click the Click to Upload Attachments button. Follow the steps in the dialog box to upload your completed work.

Emerio recommends that you request the buyer to state satisfactory completion after every milestone on the Private Message Board.
This standard business practice ensures that the service is being delivered to both parties expectations and prevents miscommunication.

Invoicing the Buyer

Agreeing on the Terms

At key milestones or when you have completed the project, you will need to invoice the buyer through Emerio to receive payment. Once the buyer receives your invoice, they will send payment via Emerio's Billing & Payment system.
To invoice the buyer:

1 Click My Emerio Selling Activity Accepted Projects.
2 Click the Send Invoice icon in the Invoice column.
3 Enter the amount due, then click Continue.

Emerio recommends that you request a signed copy of the invoice from the buyer, especially for larger dollar value projects. This is your proof that you have delivered work that is received by the buyer. It is good business practice and protects you from disputes and payment charge-backs

To request a signed copy of the invoice, ask the buyer to print a copy of the Emerio invoice, annotate with "For services rendered", date and sign at the bottom. Ensure that the buyer either faxes or mails you a copy of the document for your records.

Receiving Payment

Once the buyer submits payment, the invoice icon will change next to your project in Selling Activity Accepted Projects.

1 Click the New Payment icon to see payment date, payment amount, and any notes from the buyer.
2 Click Account to go to your Emerio Account and view your transaction history or withdraw funds.

Withdrawing Funds

You can withdraw funds from your Emerio Account at any time. If you are in the United States (including Hawaii and Alaska), you can withdraw by Automated Clearing House (ACH) or check. If you are outside the United States, you can withdraw by wire transfer.
To withdraw funds:

1 Click My Emerio Account Withdraw Funds.
2 Enter the amount you want to withdraw.
3 Select a withdrawal method, then click Continue.
Please carefully read the instructions for requesting a wire transfer, check or ACH withdrawal. These instructions are located in the Help Index > Emerio Account section.