



# Supplier Portal

Oracle Procurement Cloud Job Aid  
Last Updated: May 2024



# BPMI

# Supplier Portal

Reference this job aid for instruction on how to perform key actions within the Oracle Cloud Supplier Portal.

**03** [Sign In & Explore](#)

**10** [Manage Supplier Profile](#)

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**58** [Invoice & Payments Work Area](#)

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# SIGN IN & EXPLORE

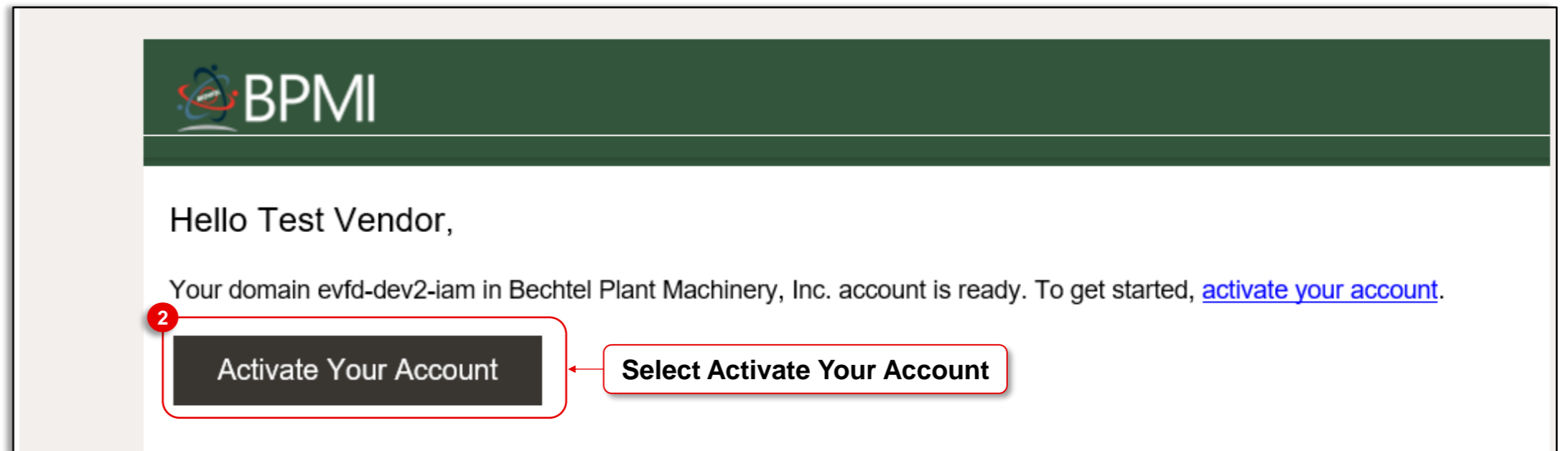
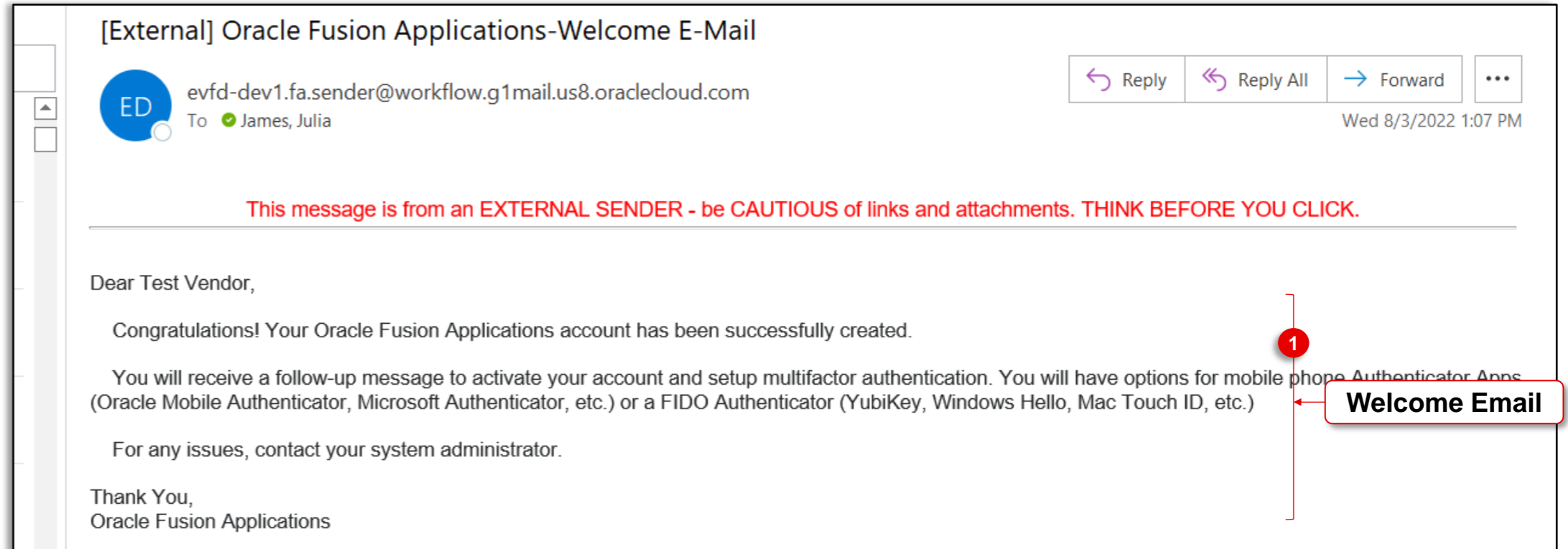
# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

After a supplier registration is approved by BPMI, contacts that requested access to the Supplier Portal will have accounts created for them. Supplier contacts will receive an email from Oracle with details on how to reset their password and set up Multi-factor Authentication.

1. Users will receive a welcome email from Oracle Fusions Applications to inform them that their account has been successfully created.
2. Locate the follow up email from Oracle Fusions Applications to activate the account. Select the **link** in the body of the email.

**Note:** The activation email is only valid for 7 days. Email [bpmi.bsahelp@unnpp.gov](mailto:bpmi.bsahelp@unnpp.gov) for help with an expired activation request.



# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

3. Create a password for the Supplier Portal account.
4. Select **Reset Password** when done.
5. A confirmation message will show, select **Continue to Sign In**.

**BPMI**  
Bechtel Plant Machinery, Inc.  
julia.james@afs.com  
Identity domain ⓘ  
evfd-dev2-iam

Reset your password  
Set a password for your user account.

New Password

Confirm New Password

**3** Create Password

**4** Reset Password Select Reset Password

**BPMI**  
Bechtel Plant Machinery, Inc.  
julia.james@afs.com  
Identity domain ⓘ  
evfd-dev2-iam

✔

Congratulations!  
Your password has been reset. Please login using your new password.

**5** Continue to Sign In Select Continue to Sign In

# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

6. Enter the user ID (email address) and password associated with the Supplier Portal account.
7. Select **Sign In**.
8. Users are required to setup Multi-factor Authentication upon first login. Select **Enable Secure Verification**.

**BPMI**  
Bechtel Plant Machinery, Inc.  
Oracle Cloud Account Sign In  
Identity domain ⓘ  
evfd-dev2-iam

User Name  
User name or email

Password  
Password

[Forgot Password?](#)

Sign In

6 Enter User ID & Password

7 Select Sign In

### Enable Secure Verification

Secure verification methods prove who you are. Two types of verification methods are passwordless and multi-factor authentication (MFA). Passwordless verification allows you to verify your identity without requiring you to remember a password. MFA is an extra security step to the authentication process. Your administrator might have set up one or both verification methods and require that you enroll in them before accessing your account.

Password + Proof = Secure Access

Click below to enable secure verification methods for your account.

Enable Secure Verification

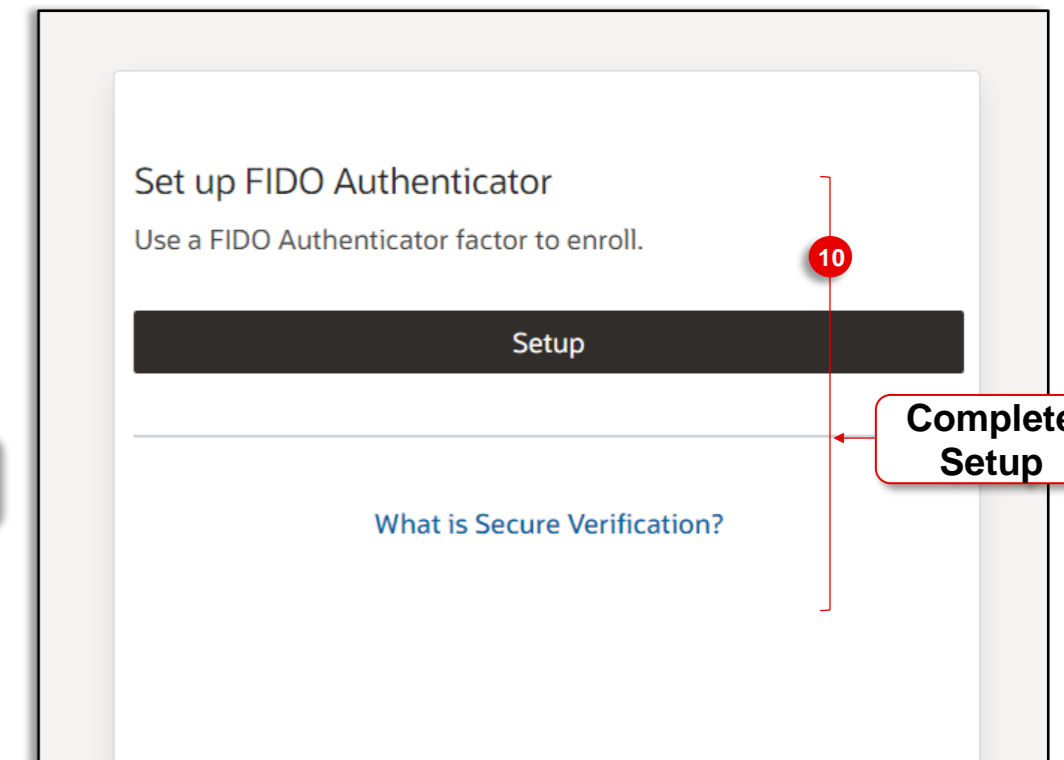
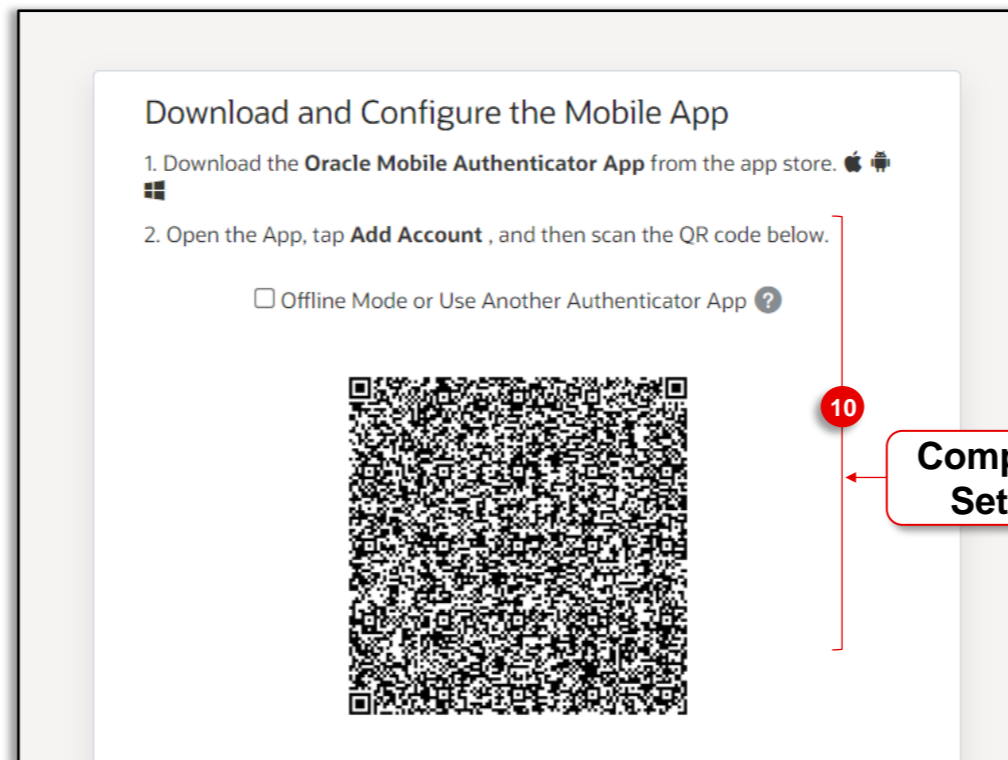
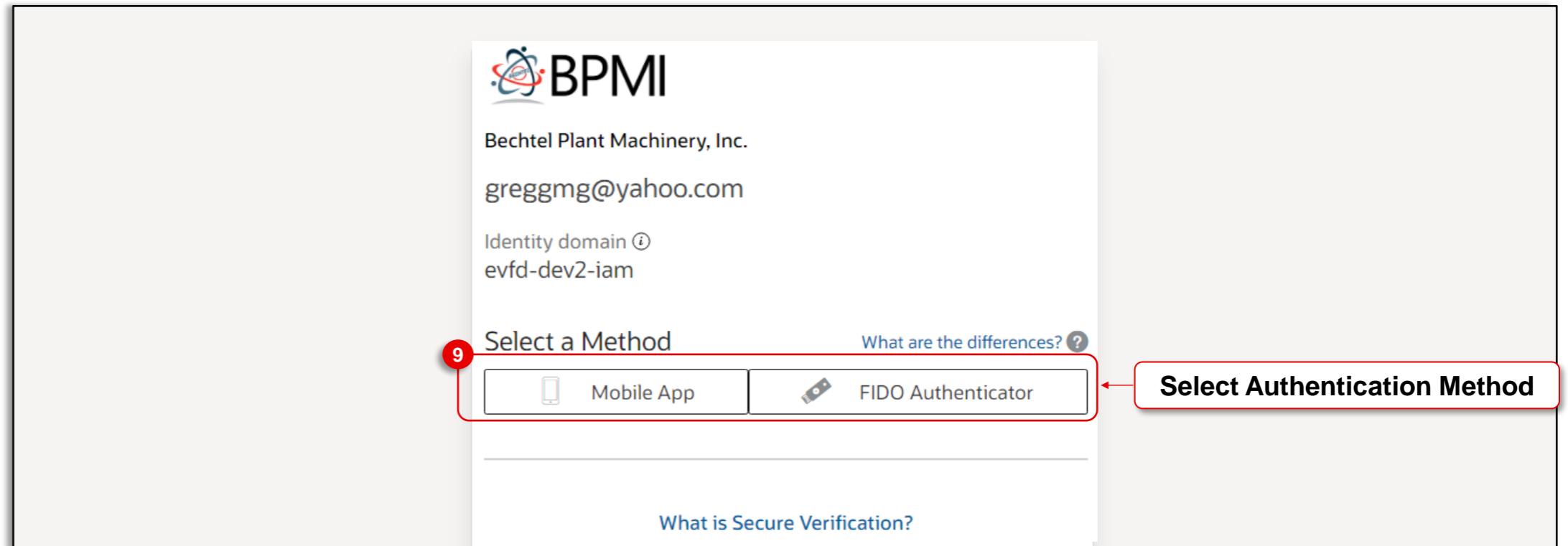
8 Select Enable Secure Verification

[What is Secure Verification?](#)

# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

9. Choose an authentication method. Select either **Mobile App** or **FIDO Authenticator**.
10. Follow the instructions provided on the screen for the chosen authentication method.



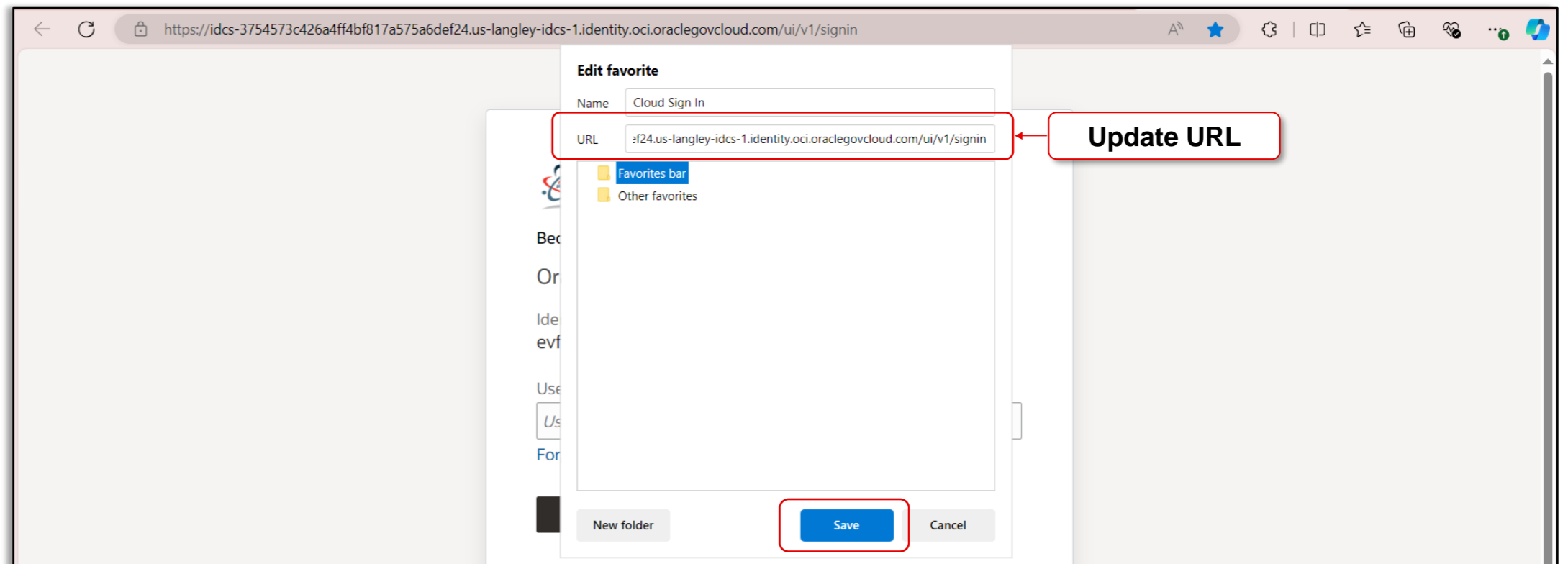
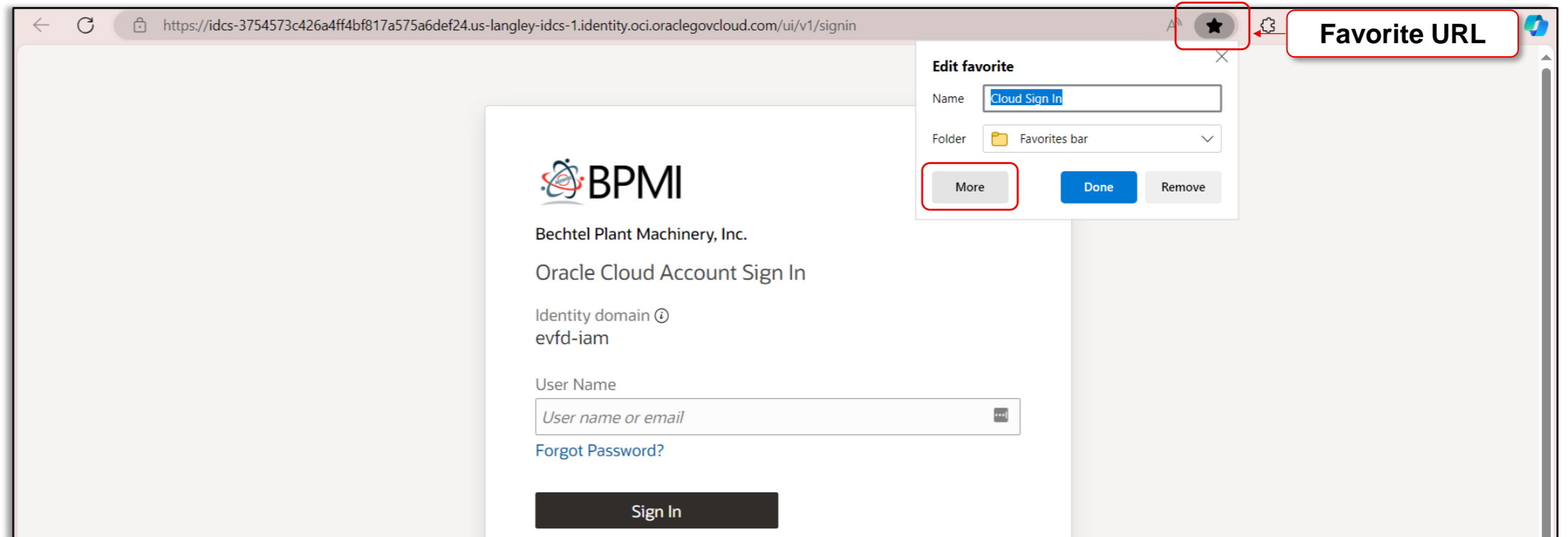
# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

11. Afterwards, use the following link to log in to the Portal:

<https://idcs-3754573c426a4ff4bf817a575a6def24.us-langley-idcs-1.identity.oci.oraclegovcloud.com/sso/v1/app/launcher/a6192f2b68c94cc896311be4c9cf8090?appName=OFC>

**Note:** The above URL can be favorited for easy access to the Supplier Portal. When completing the steps to favorite a link, select the **More** button on the **Edit Favorite** screen, replace the URL in the URL field with the above URL.





# Supplier Portal – Sign in & Explore

Login to the Supplier Portal.

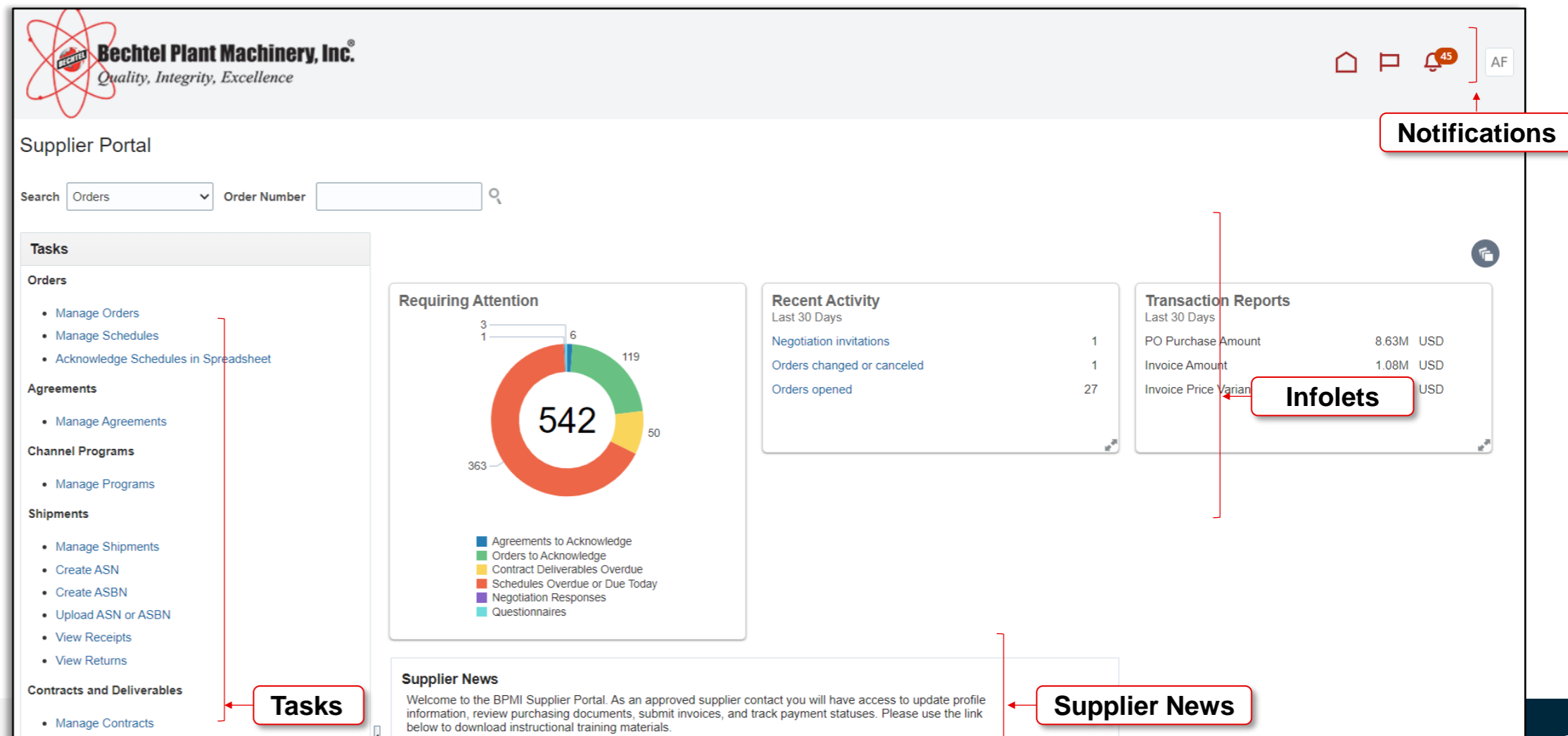
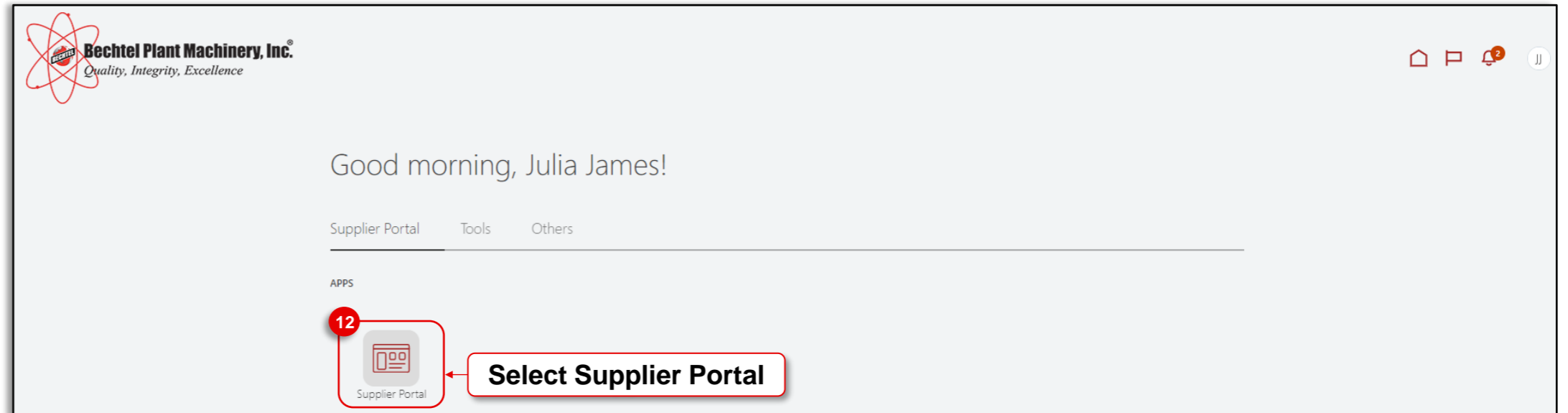
12. Once successfully logged in, the Oracle Cloud home page will show. Select the **Supplier Portal** tile.

13. Key features of the Supplier Portal home page are explained below.

## Home Page

- **Tasks:** Select the available tasks and activities that can be performed in the portal
- **Notifications:** View informational messages and tasks requiring attention (e.g., PO acknowledgement). Some actions requiring attention can be completed directly within the notification
- **Infolets:** Use the interactive widgets to get an overview of recent procurement activities, transaction reports and outstanding actions
- **Supplier News:** View announcements from BPMI and access training materials/additional support

**Note:** The tasks available to a user is dependent on the user's assigned role(s) within the Supplier Portal.



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# MANAGE SUPPLIER PROFILE

# Supplier Portal – Manage Supplier Profile

Review and update supplier profile information.

Within the Supplier Portal, suppliers are able to view and maintain their profile information. When required, suppliers can submit a change request to update their profile information to ensure data remains accurate and up to date. Please note that all profile change requests undergo the review and approval of BPMI.

1. Select **Manage Profile** under the **Company Profile** section of the Supplier Portal home page.
2. The **Company Profile** page opens, review profile details as needed. When required, select **Edit** to update the information.

The screenshot shows a navigation menu on the left side of the Supplier Portal. The menu items are categorized as follows:

- Manage Contracts
- Manage Deliverables
- Consigned Inventory**
  - Review Consumption Advices
  - Review Consigned Inventory
  - Review Consigned Inventory Transactions
- Invoices and Payments**
  - Create Invoice
  - Create Invoice Without PO
  - View Invoices
  - View Payments
- Negotiations**
  - View Active Negotiations
  - Manage Responses
- Qualifications**
  - Manage Questionnaires
  - View Qualifications
- Company Profile**
  - **Manage Profile**

A red box highlights the 'Manage Profile' link, with a red circle containing the number '1' next to it. A callout box labeled 'Select Manage Profile' points to this link. The main content area on the right contains text: 'below to download instructional training materials.', '<Add link to supplier training guide>', and 'For inquires, please contact Suppliers@BPMI.com'.

The screenshot shows the 'Company Profile' page. At the top right, there are 'Edit' and 'Done' buttons. A red box highlights the 'Edit' button, with a red circle containing the number '2' next to it. A callout box labeled 'Select Edit' points to this button. Below the buttons, there are tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Organization Details' tab is selected and expanded, showing the following information:

Company	Design Inc.	Tax Organization Type	Corporation
Supplier Number	10015	Status	Active
Supplier Type		Attachments	None

Below this, the 'Identification' section is partially visible.

# Supplier Portal – Manage Supplier Profile

Review and update supplier profile information.

3. A warning message will show. Select **Yes** to continue.
4. Update the supplier record. Navigate through the profile information using the tabs located at the top of the page:
  - **Organization Details**
  - **Tax Identifiers**
  - **Addresses**
  - **Contacts**
  - **Payments**
  - **Business Classifications**
  - **Products & Services**

**Note:** For specifics on updating contacts, please refer to pages 14-19 of this job aid.

5. Once edits are complete, locate the **Change Description** textbox. Enter a description of the changes made to the profile.
6. Select **Review Changes** to review the updated profile information.

This screenshot shows the 'General' tab of the supplier profile for 'Julia's Inc.'. A warning dialog box is displayed in the center, asking for confirmation to create a change request. The dialog box contains the text: 'Warning POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?'. There are 'Yes' and 'No' buttons. A red circle with the number '3' is placed over the 'Yes' button, with a callout box below it that says 'Select Yes'.

This screenshot shows the 'Edit Profile Change Request' page for request 8001. The page has several tabs: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Organization Details' tab is selected. A red circle with the number '4' is placed over the 'Organization Details' tab. A 'Change Description' text box is visible, with a red circle with the number '5' and a callout box that says 'Enter Change Description'. At the bottom right, there are buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. A red circle with the number '6' is placed over the 'Review Changes' button, with a callout box that says 'Select Review Changes'. In the middle of the page, there is a callout box that says 'Update Profile' with an arrow pointing to the 'Supplier Name' field.

# Supplier Portal – Manage Supplier Profile

Review and update supplier profile information.

7. Select **Edit** to continue making updates. Select **Submit** when done. A confirmation note will show. The profile change request is routed to BPMI for review and approval.

Review Changes

Change Description: Updating profile information to include customer identification number and a new contact.

Organization Details

Attribute	Changed From	Changed To
Supplier Type		Supplier
Customer Number		00112233

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
+ Doe, Jane		Jane.Doe@email.com				Active	

Columns Hidden: 7

Buttons: Edit, **7** Submit, Cancel

Callout: Select Submit

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# MANAGE SUPPLIER PROFILE – MANAGE CONTACTS

# Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

1. On the **Company Profile** page, select the **Contacts** tab.
2. The list of contacts display. A user can add new contacts by selecting the **Create** icon or update the details of existing contacts by selecting the **Edit** icon.

The following pages of this job aid will demonstrate how to edit an existing contact.

The screenshot shows the 'Company Profile' page with the 'Contacts' tab selected. A red circle with the number '1' highlights the 'Contacts' tab in the navigation bar. A red box labeled 'Select Contacts' is positioned over the 'Contacts' tab. The page displays various fields for the company profile, including 'Company', 'Supplier Number' (10015), 'Supplier Type', 'Tax Organization Type' (Corporation), 'Status' (Active), and 'Attachments' (None).

The screenshot shows the 'Edit Profile Change Request' page for request 6001. A red circle with the number '2' highlights the 'Create' (+) and 'Edit' (pencil) icons in the table's action column. Two red boxes labeled 'Create New Contacts' and 'Edit Existing Contacts' are positioned over these icons. The table below lists contacts with columns for Job Title, Email, Phone, Administrative Contact, User Account, and Status.

Job Title	Email	Phone	Administrative Contact	User Account	Status
	chuckgalliganiv@gmail.com		✓	✓	Active
Contracts	joseph.smith@test.com		✓	✓	Active
			✓		Active

# Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

## Edit an Existing Contact

1. To edit an existing contact, choose the appropriate contact and select the **Edit** icon on the tool bar.
2. On the Edit Contact screen, update the information as required, including email, phone number, etc.

**Note:** Select the **Administrative contact** checkbox to assign the supplier contact as an administrator. A supplier administrator serves the following purposes:

- Default point of contact for all supplier registration communications (email notifications, approval decisions, etc.)
- Default point of contact for supplier profile maintenance
- Default point of contact for supplier qualifications

Multiple administrative contacts can be created.

**Note:** Please consider that once a contact is created it cannot be deleted. However, a contact can be made “Inactive” by updating the **Status** field.

3. If the contact intends to use the Supplier Portal, select the **Request user account** checkbox to provision portal user access.

Organization Details Tax Identifiers Addresses **Contacts** Business Classifications Products and Services

Actions View Format **1** Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Smith, Chuck		chuckgalliganiv@gmail.com		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
Smith, Joseph	Contracts	joseph.smith@test.com		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
				<input checked="" type="checkbox"/>		Active

Columns Hidden 7

Warning! U-NNPI, UCNI, or Classified

Salutation [v]

\* First Name Julie

Middle Name

\* Last Name Smith

Job Title

Administrative contact

Phone [v]

Mobile [v]

Fax [v]

Email

Status Active [v]

**2** Update Profile Information

Contact Addresses

Address Name	Address	Phone	Address Purpose	Status
No data to display.				

Columns Hidden 5

User Account

Request user account

**3** Select Request user account checkbox

User Account	Status
<input checked="" type="checkbox"/>	Active
<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Active



# Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

## Edit an Existing Contact

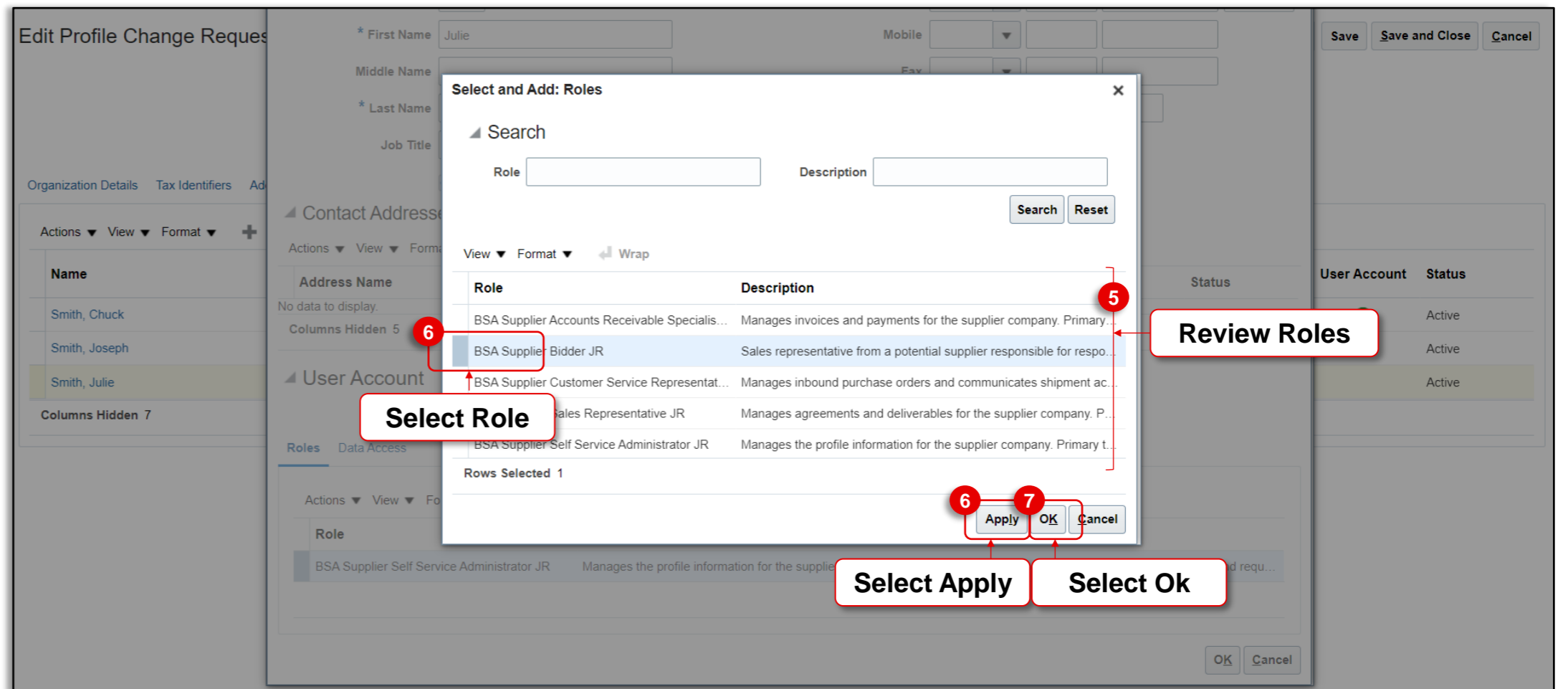
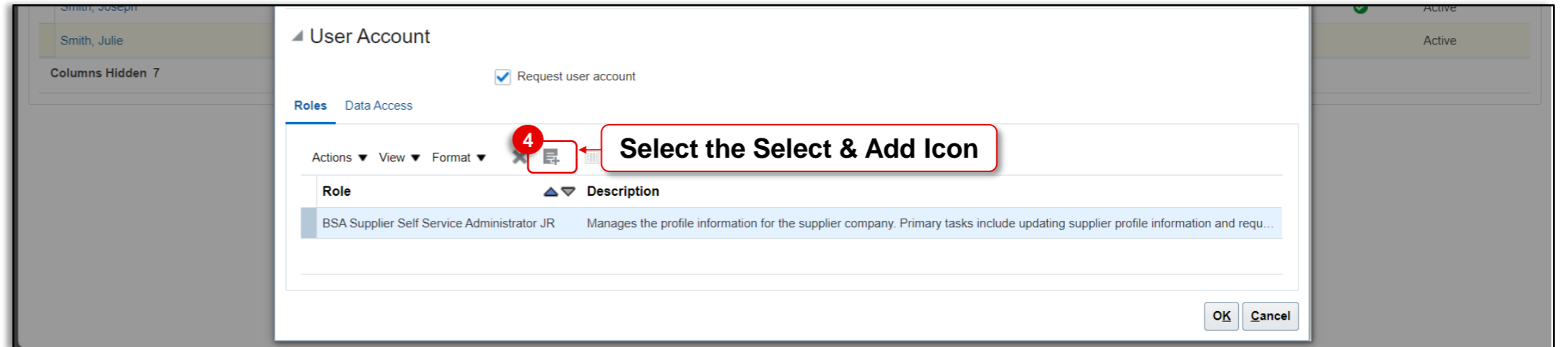
4. Under the Roles section, the default role assigned to Portal users display. Assign the contact additional roles by selecting the **Select and Add** icon.

5. The list of roles available to a supplier contact display. Read the description of each role.

**Note:** Select **Description** and click on the **Wrap** button to display the entirety of each role description.

6. Assign the contact the appropriate role(s) by selecting the role(s) and clicking on the **Apply** button.

7. When finished applying roles select **Ok**.



# Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

## Edit an Existing Contact

- When finished updating the contact information. Select **Ok**.

Organization Details Tax Identifiers Ad

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

Save Save and Close Cancel

Actions View Format +

Name
Smith, Chuck
Smith, Joseph
Smith, Julie

Columns Hidden 7

Actions View Format X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				

Columns Hidden 5

Actions View Format X Freeze Detach Wrap

Request user account

Roles Data Access

Role	Description
BSA Supplier Bidder JR	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, request...
BSA Supplier Self Service Administrator JR	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...

8 OK Cancel

Select Ok

# Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

## Edit an Existing Contact

9. Once edits are complete, locate the **Change Description** textbox. Enter a description of the changes made to the profile.
10. Select **Review Changes** to review the updated profile information.
11. Select **Edit** to continue making updates. Select **Submit** when done.

Once the profile change request is processed, contacts that requested Supplier Portal accounts will receive an email from Oracle with further instructions on setting up their account.

Edit Profile Change Request: 8001

Change Description

9 Enter Change Description

10 Select Review Changes

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

\* Supplier Name Julia's Inc.

Supplier Number 10044

Supplier Type

Tax Organization Type Corporation

Status Active

Attachments None +

Identification

D-U-N-S Number 145345612

National Insurance Number

Review Changes

Change Description Updating profile information to include customer identification number and a new contact.

11 Select Submit

Organization Details

View Format Freeze Detach Wrap

Attribute	Changed From	Changed To
Supplier Type		Supplier
Customer Number		00112233

Contacts

View Format Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
+ Doe, Jane		Jane.Doe@email.com				Active	

Columns Hidden 7

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# NEGOTIATIONS WORK AREA

# Supplier Portal – Negotiations Work Area

Access the negotiations work area.

Within the Negotiations Work Area, a supplier may:

- Acknowledge participation
- Create a response
- Manage active responses

See the following pages of this job aid for information on how to perform key tasks related to the negotiation process.

The screenshot displays the Supplier Portal interface with a left-hand navigation menu and a main content area. The navigation menu includes sections for Channel Programs, Shipments, Contracts and Deliverables, Consigned Inventory, Invoices and Payments, and Negotiations. The Negotiations section is highlighted with a red bracket and a callout box that says "Access the Negotiations Work Area". The main content area features a donut chart with a total count of 363, a Transaction Reports table for the last 30 days, and a Supplier News section.

**Channel Programs**

- Manage Programs

**Shipments**

- Manage Shipments
- Create ASN
- Create ASBN
- Upload ASN or ASBN
- View Receipts
- View Returns

**Contracts and Deliverables**

- Manage Contracts
- Manage Deliverables

**Consigned Inventory**

- Review Consumption Advices
- Review Consigned Inventory
- Review Consigned Inventory Transactions

**Invoices and Payments**

- Create Invoice
- Create Invoice Without PO
- View Invoices
- View Payments

**Negotiations**

- View Active Negotiations
- Manage Responses

**363**

- Agreements to Acknowledge
- Orders to Acknowledge
- Contract Deliverables Overdue
- Schedules Overdue or Due Today
- Negotiation Responses
- Questionnaires

**Transaction Reports**  
Last 30 Days

PO Purchase Amount	8.63M	USD
Invoice Amount	1.08M	USD
Invoice Price Variance Amount	0	USD

**Supplier News**

Welcome to the BPMI Supplier Portal. As an approved supplier contact you will have access to update profile information, review purchasing documents, submit invoices, and track payment statuses. Please use the link below to download instructional training materials.

<Add link to supplier training guide>

For inquires, please contact Suppliers@BPMI.com

**Access the Negotiations Work Area**

---

# NEGOTIATIONS – ACKNOWLEDGE PARTICIPATION

# Supplier Portal – Acknowledge Participation

Accept or decline an invitation to participate in an RFP with BPMI.

## View/Acknowledge Negotiation

After an RFP is published, invited suppliers are notified via email and the Supplier Portal. Within the Portal, suppliers can review the invitation and decide whether to participate.

1. Select the **View Active Negotiations** link on the Supplier Portal home page.

**Note:** A Supplier may also access RFPs requiring acknowledgement using the **Notification Bell** and the **Requiring Attention** Infolet on the Supplier Portal home page.

2. On the Active Negotiations page, a Supplier can view the general details (e.g., Time Remaining, Close Date, etc.) of all on-going (active) RFPs.

Prior to determining whether to participate in a new RFP, review the RFP details in full. Select the link to open the RFP.

**Note:** Search for a specific RFP by entering details in the search criteria fields. When finished, select **Search** to populate the appropriate RFP(s) in the Search Results section.

This screenshot shows the navigation menu of the Supplier Portal. The 'Negotiations' section is highlighted with a red box and a red circle containing the number '1'. A red callout box with the text 'Select View Active Negotiation' points to the 'View Active Negotiations' link within the 'Negotiations' section. Other sections visible include 'Create Invoice Without PO', 'View Invoices', 'View Payments', 'Qualifications', and 'Company Profile'.

This screenshot shows the 'Active Negotiations' page. The search criteria fields are visible, including 'Negotiation', 'Title', and 'Negotiation Close By'. The search results section shows a table with one row of results. A red box and a red circle containing the number '2' highlight the first row, with a red callout box pointing to it that says 'Select Negotiation'. The table columns include Negotiation ID, Title, Negotiation Type, Time Remaining, Close Date, Your Responses, Will Participate, Unread Messages, View PDF, and Response Spreadsheet.

Negotiation	Title	Negotiation Type	Time Remaining	Close Date	Your Responses	Will Participate	Unread Messages	View PDF	Response Spreadsheet
214	Test Negotiation	RFP	10 Hours 56 Min...	7/27/23 1:30 PM	0	0	0		

# Supplier Portal – Acknowledge Participation

Accept or decline an invitation to participate in an RFP with BPMI.

## View/Acknowledge Negotiation

- The RFP details display. Navigate through the RFP using the Table of Contents links on the left of the page (e.g., Cover Page, Overview, Requirements, etc.).

**Note:** Be sure to review any documents included with the RFP. Select the **Actions** dropdown. Choose **View** from the list and select **View Attachments**.

- After the specifics of the RFP have been reviewed, acknowledge participation. Select the **Actions** dropdown. Choose **Respond** from the list and select **Acknowledge Participation**.

RFP: 251

Currency = US Dollar

Title Test Negotiation 1.30

Status Active (Locked)

Time Remaining 335 Days 5 Hours

Open Date 1/30/24 9:39 PM

Close Date 12/31/24 3:29 AM

Time Zone Coordinated Universal Time

Table of Contents

- Cover Page
- Overview
- Requirements
- Lines
- Contract Terms

**3** Review RFP Details

Faxed or emailed proposals will not be accepted. Any method of transmittal other than through the mail must have BPMI's written approval prior to transmittal of the proposal.

BPMI reserves the right to reject all proposals or to award an order on the basis of the proposal, which after evaluation of all pertinent factors, including the supplier standards established in Federal Acquisition Regulations (FAR) Subpart 9.1, is considered to be advantageous to BPMI and/or the Government.

Documents which may be required in the preparation of your proposal, such as Terms and Conditions (TAC), Requirements for Contract Administration (RCA), and PINN and certain forms, are available upon request to the undersigned or may be available on BPMI's E-Commerce site (password required – discuss access with the undersigned). It is suggested that you promptly check the contents of this package and immediately determine if additional information is required to support submission of a responsive proposal.

BPMI requests that the submittal of the proposal be sent in a format which consists of the following data:

Proposal Cover Letter, addressed to the undersigned, including the following information as applicable:

RFP: 251

Currency = US Dollar

Title Test Negotiation 1.30

Status Active (Locked)

Time Remaining 335 Days 5 Hours

Open Date 1/30/24 9:39 PM

Close Date 12/31/24 3:29 AM

Time Zone Coordinated Universal Time

Table of Contents

- Cover Page
- Overview
- Requirements
- Lines
- Contract Terms

**4** Select Acknowledge Participation

Messages Create Response **4** Actions **4** Done

Acknowledge Participation Respond Analyze View

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BPMI requests that the submittal of the proposal be sent in a format which consists of the following data:



# Supplier Portal – Acknowledge Participation

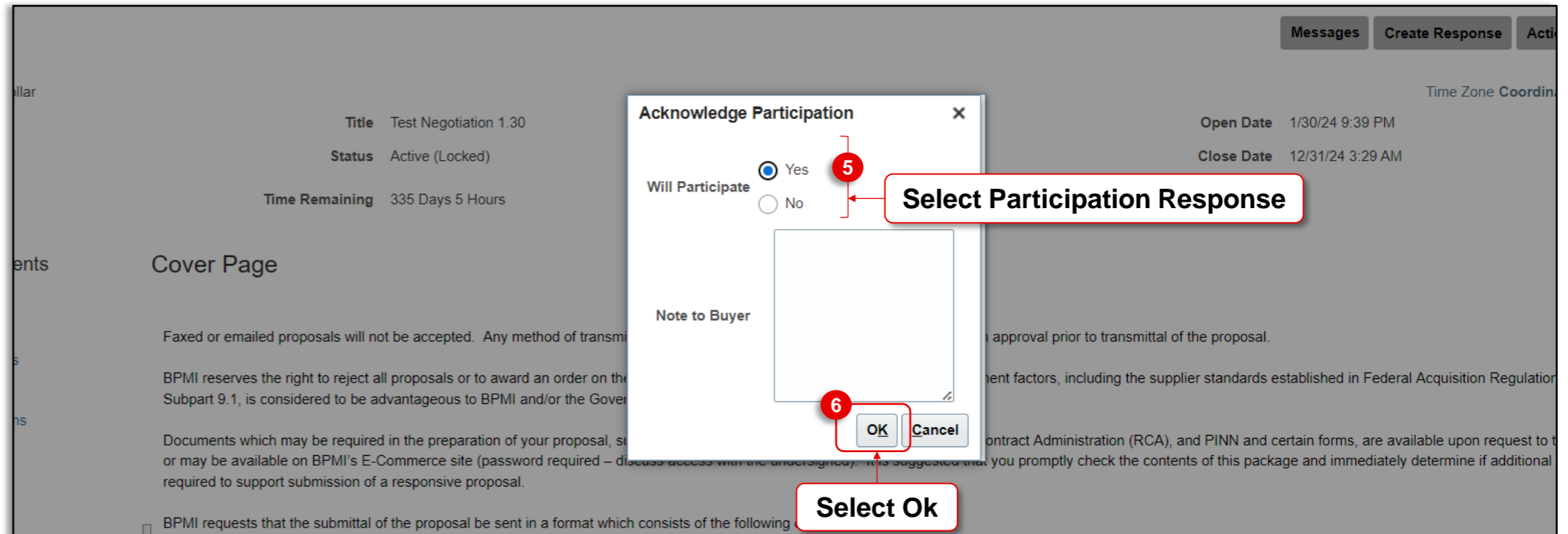
Accept or decline an invitation to participate in an RFP with BPMI.

## View/Acknowledge Negotiation

5. The Acknowledge Participation screen opens. Select a participation response (**Yes** or **No**).
6. Enter a **Note to Buyer**. If **No** is selected, please enter a note with the reason. Select **Ok**.

If the invitation was accepted, begin proposal creation. Review the Create Proposal section of this job aid for instruction on how to do this.

**Note:** Please keep in mind the close date of an accepted RFP. After the close date is reached, a supplier will be unable to submit a response to an RFP within the Portal.



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# NEGOTIATIONS – CREATE PROPOSAL

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – General

1. Once a supplier has Acknowledged Participation, select the **Create Response** button on the RFP page to begin drafting the response.

**Note:** Reference the Cover Page for the BPMI requested validity date, as applicable.

2. The Create Response (Proposal) page opens on to the Overview tab. Define general details of the response. Complete the following fields, as applicable:

- **Response Valid Until**
- **Reference Number** (i.e., supplier's internal reference number)
- **Note to Buyer**
- **Attachments**

3. Select **Next** to continue.

**Note:** A supplier can choose to respond to an RFP via spreadsheet. This option allows users to download a template to complete and then upload into the Supplier Portal as the response. For step-by-step instruction on how to respond to an RFP by spreadsheet, refer to the **Negotiations - Respond by Spreadsheet** section of this job aid.

RFP: 251

Currency = US Dollar

Title Test Negotiation 1.30

Status Active (Locked)

Time Remaining 335 Days 5 Hours

Close Date 12/31/24 3:29 AM

Messages **Create Response** Actions Done

**Select Create Response**

Table of Contents

- Cover Page
- Overview
- Requirements
- Lines
- Contract Terms

Cover Page

Faxed or emailed proposals will not be accepted. Any method of transmittal other than through the mail must have BPMI's written approval prior to transmittal of the proposal.

BPMI reserves the right to reject all proposals or to award an order on the basis of the proposal, which after evaluation of all pertinent factors, including the supplier standards established in Federal Acquisition Regulations (FAR) Subpart 9.1, is considered to be advantageous to BPMI and/or the Government.

Documents which may be required in the preparation of your proposal, such as Terms and Conditions (TAC), Requirements for Contract Administration (RCA), and PINN and certain forms, are available upon request to the undersigned or may be available on BPMI's E-Commerce site (password required – discuss access with the undersigned). It is suggested that you promptly check the contents of this package and immediately determine if additional information is required to support submission of a responsive proposal.

BPMI requests that the submittal of the proposal be sent in a format which consists of the following data:

- Proposal Cover Letter, addressed to the undersigned, including the following information as applicable:

1 2 3 4

Overview Requirements Lines Review

Messages Respond by Spreadsheet Actions Back **Next** Save Submit Cancel

**Select Next**

Create Response (Proposal 25006): Overview

Title Test Negotiation

Close Date 7/27/23 1:30 PM

Time Remaining 0 Seconds

General

Supplier Julia's Inc.

Negotiation Currency USD

Response Currency USD

Price Precision 2 Decimals Maximum

Response Valid Until m/d/yy h:mm a

Reference Number

Note to Buyer

Attachments None +

**Complete Fields**

Contract Terms

Variables ?

Deliverables

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – Requirements

- On the Requirements page, answer the negotiation questions. Read through each question carefully and provide a response.

Some questions may require supporting documents. When required, upload the document by selecting the **Manage Attachments** icon next to the **Response Attachments** field.

- The Attachments screen displays, select the **Add** icon.
- Select the **Choose File** button to upload the appropriate document. Enter a title and description for the attachment.

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – Requirements

- If multiple documents are required for the question, repeat steps 5 & 6. When finished, select **Ok**.
- After all requirements are answered, select **Next** to continue.

**Note:** There may be more than one Section to complete on the Requirements page. When applicable, click on the arrow at the bottom of the page to scroll through different Sections and to answer the questions in those Sections.

**Note:** Be sure to periodically save the draft proposal. Select the **Save/Save & Close** button located at the top right of the page.

Time Remaining 335 Days 2 Hours Close Date 12/31/24 3:29 AM

on 1. Business

\* 1. Supplier to submit Estimating Format (Form NN-P21) one time per calendar year.

a. Yes, the NN-P21 was submitted to the Lead BPMI Contract Professional for the calendar year.

Response Attachments

b. No, the NN-P21 was not previously submitted and is attached.

Comments

\* 1.a.1. The NN-P21 is attached to the proposal.

1/23/23

\* 2. Supplier to submit Representations and Certifications (Form NN-P29) one time per calendar year to the Lead BPMI Contract

Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	Choose File No file chosen			Austin Flynn

Rows Selected 1

OK Cancel

Select Ok

Create Response (Proposal 25006): Requirements ?

Overview Requirements Lines Review

Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel

Time Remaining 0 Seconds Close Date 7/27/23 1:37 PM Last Saved 7/27/23 1:37 PM Coordinated Universal Time

Section 1. Business

\* 1. Supplier to submit Estimating Format (Form NN-P21) one time per calendar year.

a. Yes, the NN-P21 was submitted to the Lead BPMI Contract Professional for the calendar year.

Response Attachments None +

b. No, the NN-P21 was not previously submitted and is attached.

Select Next

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – Lines

- Once requirements are complete, enter line information. On the Lines page, respond to each line item with a **Response Price**.

A **Promise Delivery Date** (i.e., Contract Delivery Date) can be entered for each line item also, if applicable.

**Note:** If the Contract Delivery Date is proposed in “Weeks After Receipt of Order” (WARO) provide this information in the Notes field.

**Note:** If Government Property is applicable to the action, it can be found in the attachments section of the RFP.

**Note:** Click on a **Line Item** and select the **Edit Line Details** (pencil) icon on the tool bar to view additional information about a line. On the Edit Line page, a supplier can include applicable attachments and add notes to the buyer.

- Select **Next** when done.

Create Response (Proposal 36007): Lines ?

Currency = US Dollar

Time Remaining 335 Days 1 Hour

Close Date 12/24/2024

Last Saved 1/31/24 1:53 AM Coordinated Universal Time

Line	Description	Category Name	Location	Start Price	Response Price	Target Quantity	Response Quantity	UOM	Line Amount	Promised Delivery Date
1	Test Item 1	Direct Material - M&S	BPMI Headquarters			20	20	EA		m/d/yy
2	Test Item 2	Direct Material - M&S	BPMI Headquarters							m/d/yy
3	Test Item 3	Direct Material - M&S	BPMI Headquarters			12	12	EA		m/d/yy

Rows Selected 1 Columns Hidden 7

Grand Totals

All response lines are included.

Response Amount 0.00

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – Review & Submit

11. On the Review Response (Proposal) page, review the information entered. Ensure all details are accurate. Select the different sections (Overview, Requirements, Lines) to view the entered information.

12. After its confirmed that all proposal details are entered appropriately, select the **Actions** dropdown and choose **Validate** to check for any errors.

Make any necessary adjustments and rerun the validation check until no errors or warnings are found.

Review Response: Proposal 25006 ?

Currency = US Dollar

Title Test Negotiation  
Close Date 7/27/23 1:30 PM

11 Overview Requirements Lines Review

12 Select Actions

12 Select Validate

View Negotiation  
View Response PDF  
Validate

Back Next Save Submit Cancel

Last Saved 7/27/23 12:39 PM  
Time Zone Coordinated Universal Time

General

Supplier Julia's Inc.  
Supplier Site Main  
Negotiation Currency USD  
Response Currency USD  
Price Precision 2 Decimals Maximum  
Response Valid Until

Reference Number  
Note to Buyer

Attachments None

Contract Terms

# Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

## Create Proposal – Review & Submit

13. When finished, select **Submit** to submit the proposal to BPMI. A confirmation note will show.

**Note:** If BPMI initiates an amendment on an active RFP, suppliers are notified and must acknowledge the amendment. If a supplier submitted their proposal prior to the amendment being issued, the proposal must be reviewed and resubmitted to remain valid.

**Note:** After an RFP has closed, BPMI may initiate a new round of responding. Participating suppliers are notified of the new round and are able to submit a new response to the RFP.

Review Response: Proposal 25006 ?

Currency = US Dollar

Title Test Negotiation  
Close Date 7/27/23 1:30 PM

Overview Requirements Lines Review

Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel

Last Saved 7/27/23 12:39 PM  
Time Zone Coordinated Universal Time

View Negotiation  
View Response PDF  
Validate

Overview Requirements Lines

General

Supplier	Julia's Inc.	Reference Number	
Supplier Site	Main	Note to Buyer	
Negotiation Currency	USD	Attachments	None
Response Currency	USD		
Price Precision	2 Decimals Maximum		
Response Valid Until			

▶ Contract Terms



---

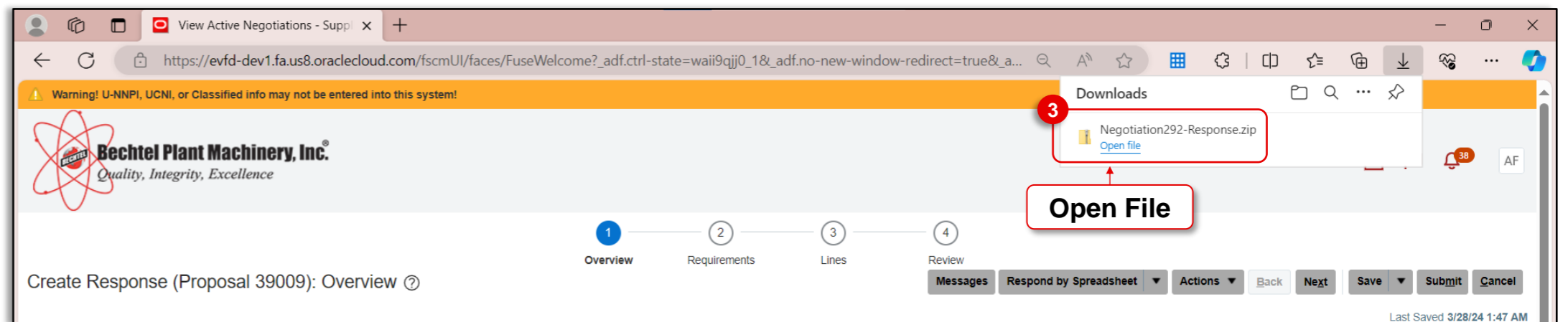
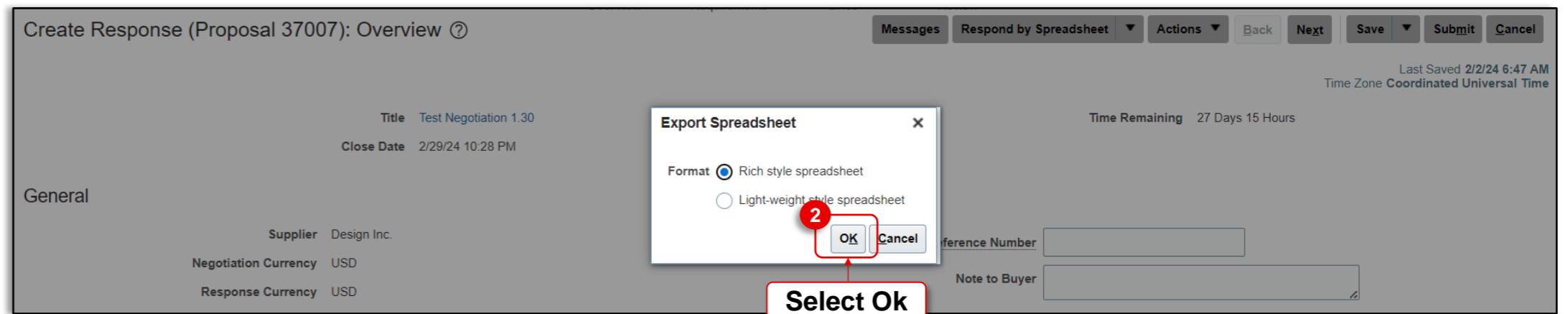
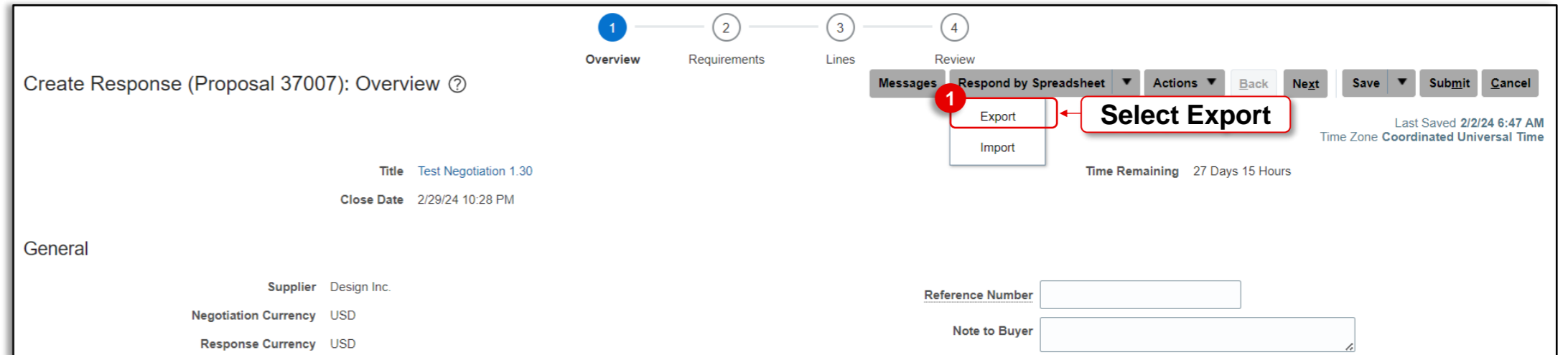
# NEGOTIATIONS – CREATE PROPOSAL VIA SPREADSHEET

# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet

1. On The Create Response (Proposal) page, select the dropdown next to the **Respond by Spreadsheet** button and choose **Export**.
2. The Export Spreadsheet screen opens. Leave the template format as Rich style spreadsheet and select **Ok**.
3. The Negotiation – Response template is downloaded onto the user's computer as a .zip file. Select **Open File** to view the downloaded template.

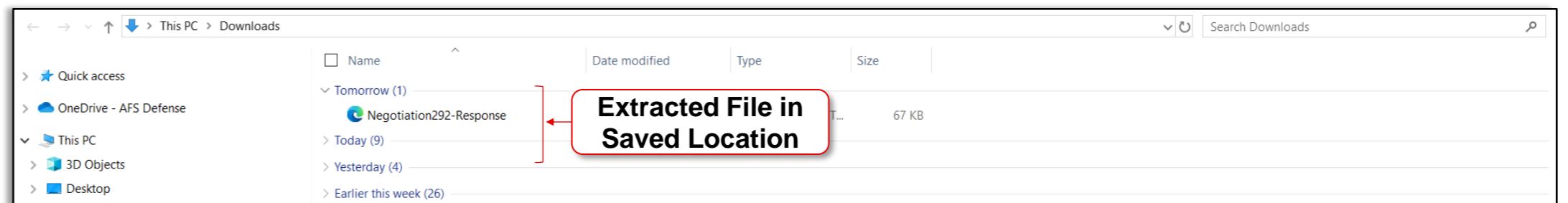
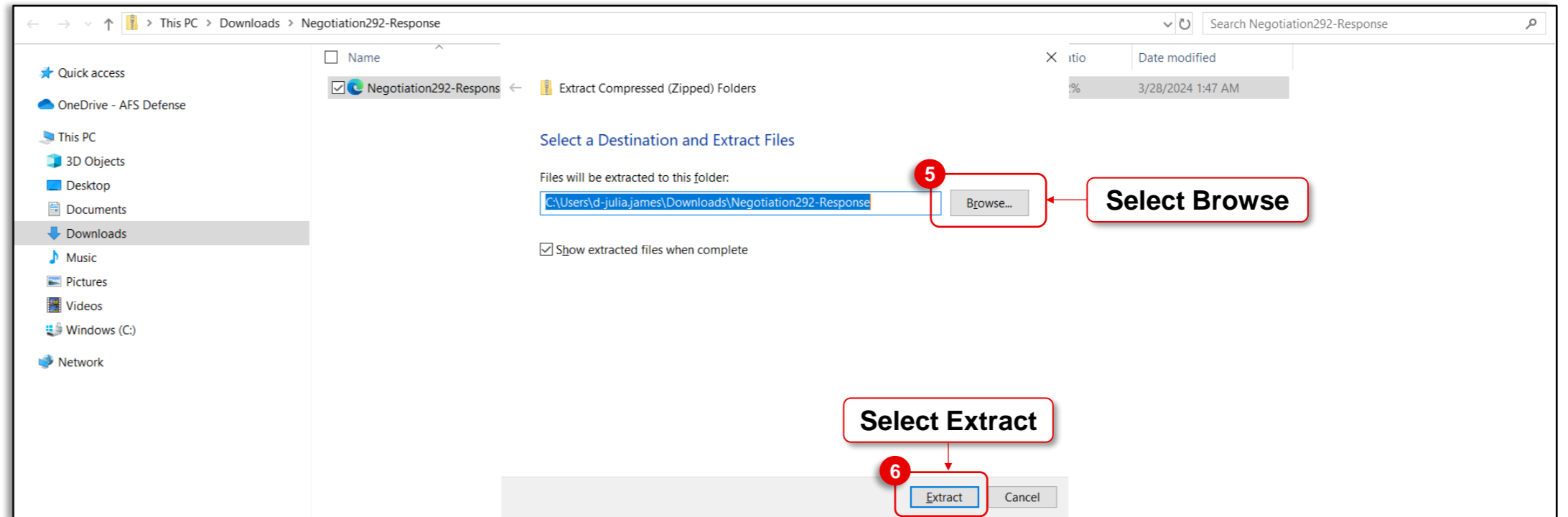
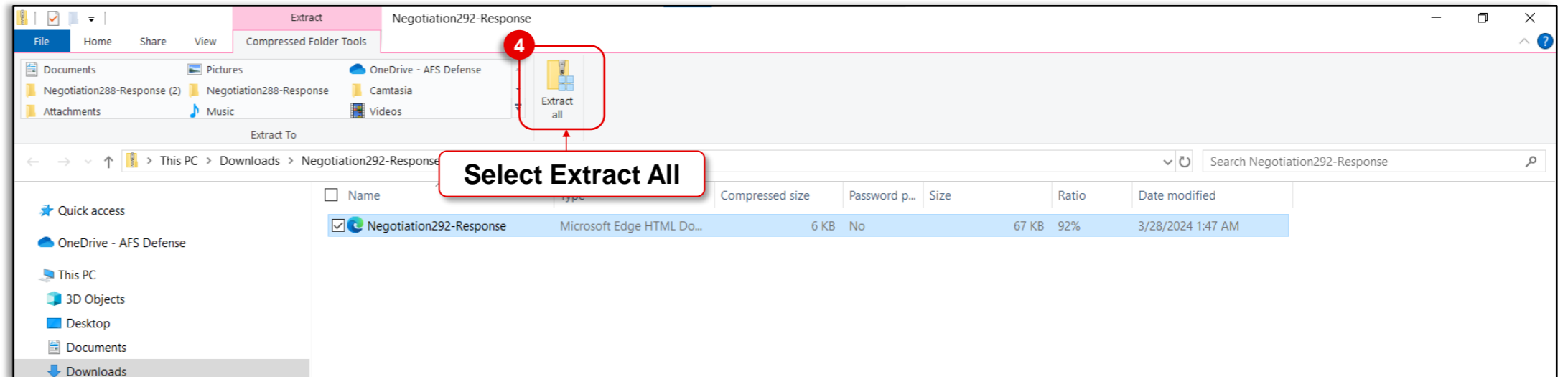


# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet

4. Prior to being able to open the file in excel, the file must be extracted. Select **Extract all**.
5. On the Extract Compressed (Zipped) Folders screen, select **Browse** and choose where to house the extracted file (e.g., Downloads, Documents, etc.).
6. After a location is chosen, select **Extract**. The saved file will show in the chosen location.

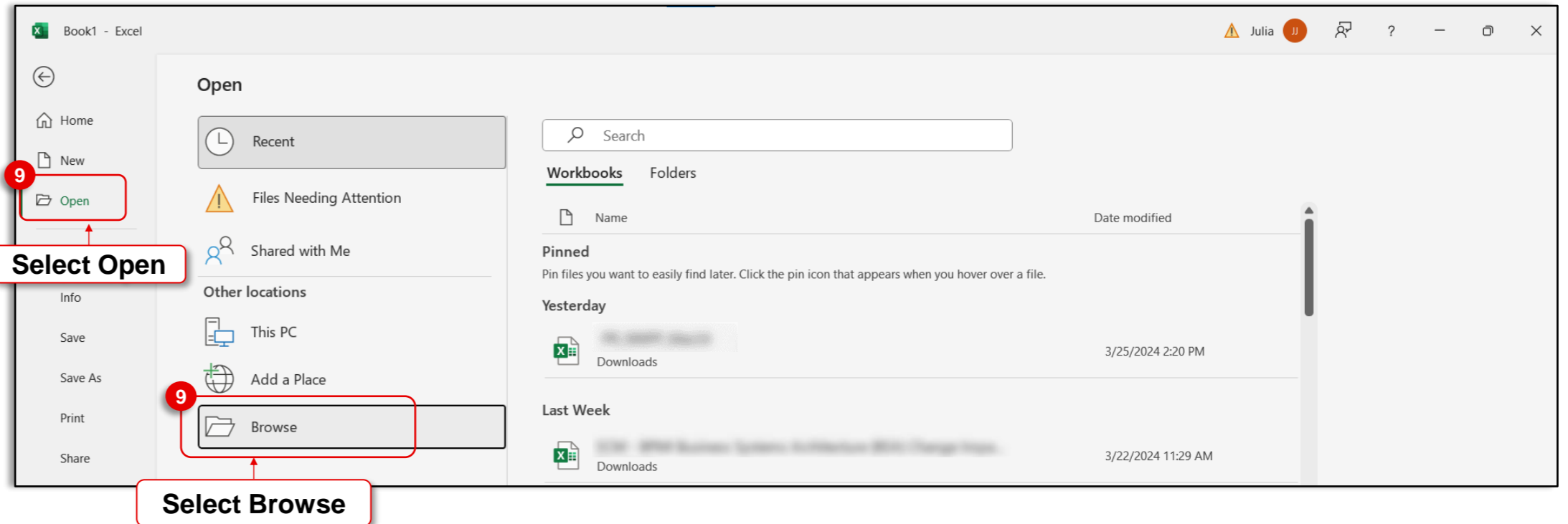
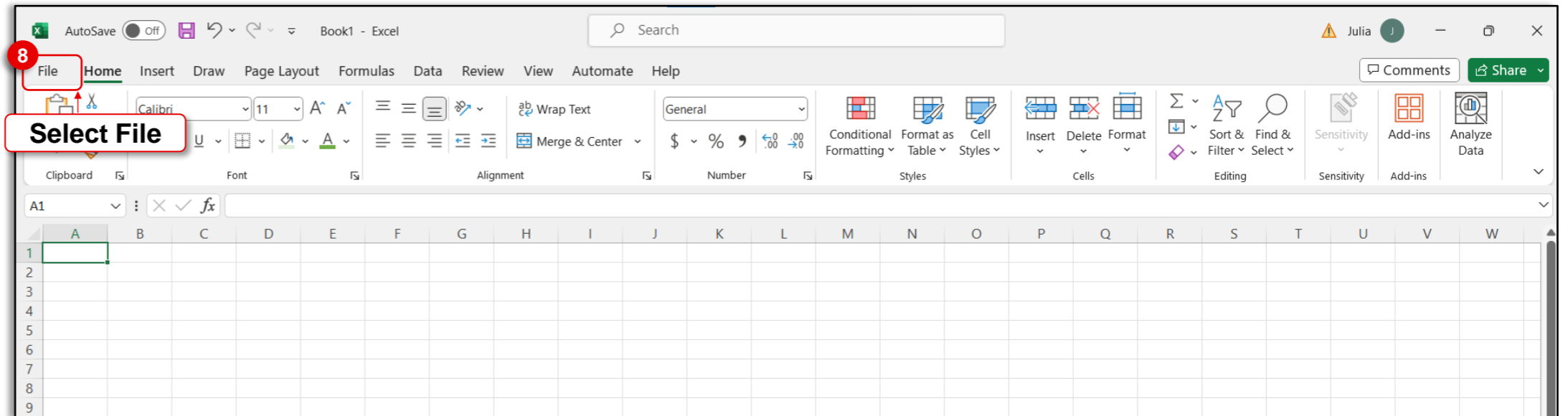


# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet

7. Once the file is extracted, users can begin using the template. To do this, open a blank excel spreadsheet.
8. Within the spreadsheet, select **File** in the top left corner.
9. Select **Open** and choose **Browse** from the list of locations.

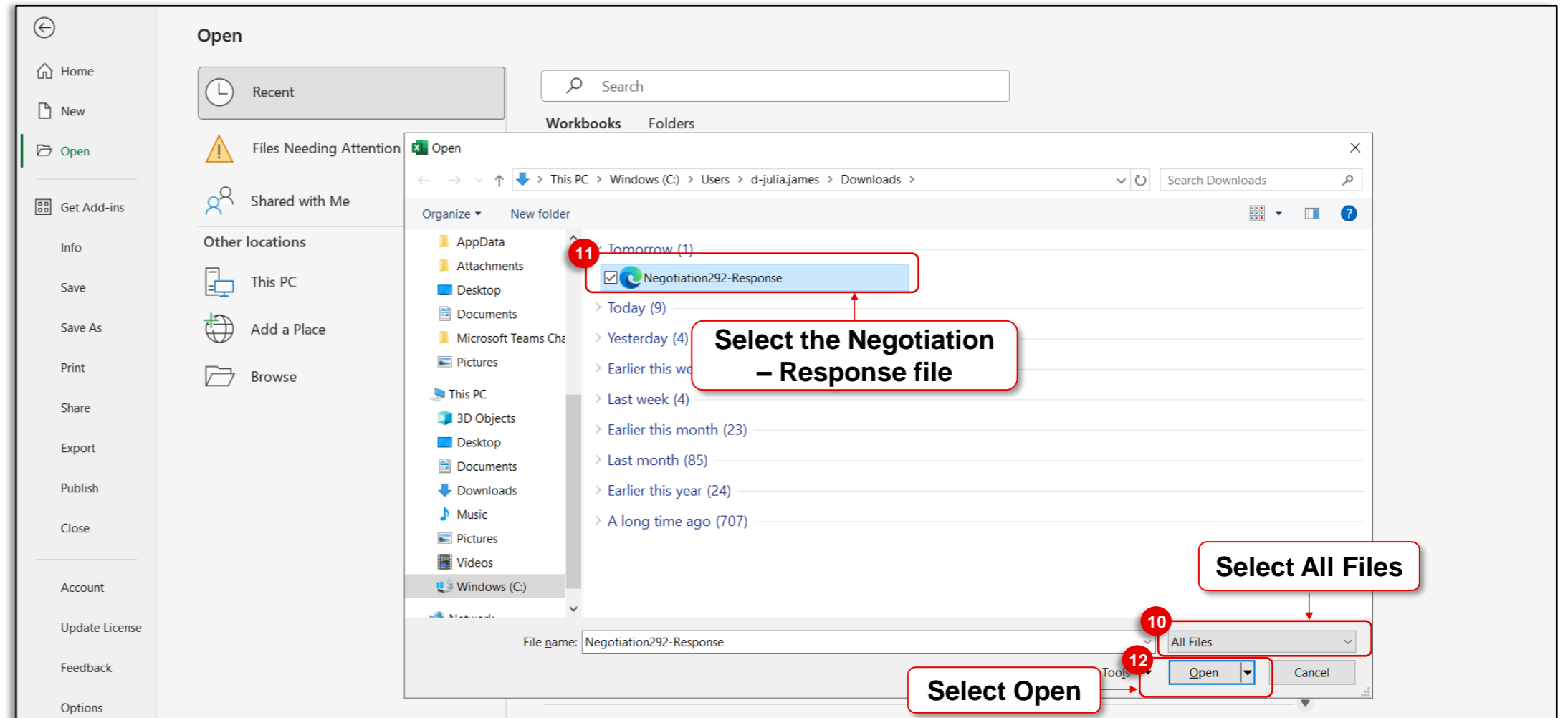


# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet

10. Ensure **All Files** is selected.
11. Locate the template from the saved location.  
Select the **Negotiation – Response** file.
12. Select **Open**.



# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet – General

13. To begin, define general details of the response. Enter values for the below items in their applicable green shaded cell:

- **Response Valid Until**
- **Reference Number** (i.e., supplier's internal reference number)
- **Note to Buyer**

The screenshot shows an Excel spreadsheet with the following content:

Test Negotiation 1.30	
Negotiation RFP 288	Company Bechtel Plant Machinery, Inc.
Close Date 2/29/2024 22:28	Buyer James, Julia
Negotiation Currency USD	Phone
Response Currency USD	Email <a href="mailto:julia.james@afs.com">julia.james@afs.com</a>
Price Precision 2	Supplier Design Inc.
	Supplier Site
<b>General</b>	
Response Valid Until <input type="text"/>	Reference Number <input type="text"/>
<small>Example: 2/1/2024 20:33</small>	
Note to Buyer	
<input type="text"/>	

A red circle with the number '13' and a red box labeled 'Enter General Details' are positioned over the 'Response Valid Until' and 'Reference Number' input fields.

# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet – Requirements

14. After response details are defined, answer the negotiation questions (requirements). Read through each question carefully and provide responses in the yellow shaded cells.

Please note that some questions may require supporting documents. After the response spreadsheet is completed and been imported into Oracle, a Supplier must access the Requirements page within the Supplier Portal and attach the required documentation (refer to page 20).

**Requirements**

1. Business

1. Supplier to submit Estimating Format (Form NN-P21) one time per calendar year.  
a. Yes, the NN-P21 was submitted to the Lead BPMI Contract Professional. (Response attachments are optional)  
Comments

1.a.1. The NN-P21 is dated: 1/23/2023 Date value only

2. Supplier to submit Representations and Certifications (Form NN-P29) one time per calendar year to the Lead BPMI Contract Professional, unless otherwise stated in the RFP or unless Supplier subsequently revises the form during the calendar year in which case the Supplier must submit revised certification.  
a. Yes, the NN-P29 was submitted to the Lead BPMI Contract Professional.  
Comments

2.a.1. The NN-P29 is dated: 1/29/2023 Date value only

3. Supplier to state if Special Tooling or Special Test Equipment is required in performance of the proposed purchase order and attach Estimate (Form NN-P38), if applicable.  
a. No, special tooling or special test equipment is not required.  
Comments

**14**

**Complete Requirements**

# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet – Lines

15. Once requirements are complete, enter line information. Select the **Lines tab**.

16. On the Lines tab, respond to each line item with a **Response Price**.

A **Promise Delivery Date** (i.e., Contract Delivery Date) and **Note to Buyer** can be entered for each line item also, if applicable.

Test Negotiation 1.30

Negotiation RFP 288  
Close Date 2/29/2024 22:28  
Negotiation Currency USD  
Response Currency USD  
Price Precision 2

Company Bechtel Plant Machinery, Inc.  
Buyer James, Julia  
Phone  
Email [julia.james@afs.com](mailto:julia.james@afs.com)  
Supplier Design Inc.  
Supplier Site

Lines

Response Amount (USD) 0.00

Line	Item	Revision	Start Price	UOM	Negotiation Quantity	Response Price	Response Quantity	Promised Delivery Date	Note to Buyer	Requested Delivery Date	Target Price	Category Name	Location
1	Test Item 1			EA	20		20					Direct Material - M&S	BPMI Headquarters
2	Test Item 2											Direct Material - M&S	BPMI Headquarters
3	Test Item 3			EA	12		12					Direct Material - M&S	BPMI Headquarters

Last Downloaded 2/1/2024 20:33

General | **Lines (1 - 3)**

Select Lines

Enter Response Price

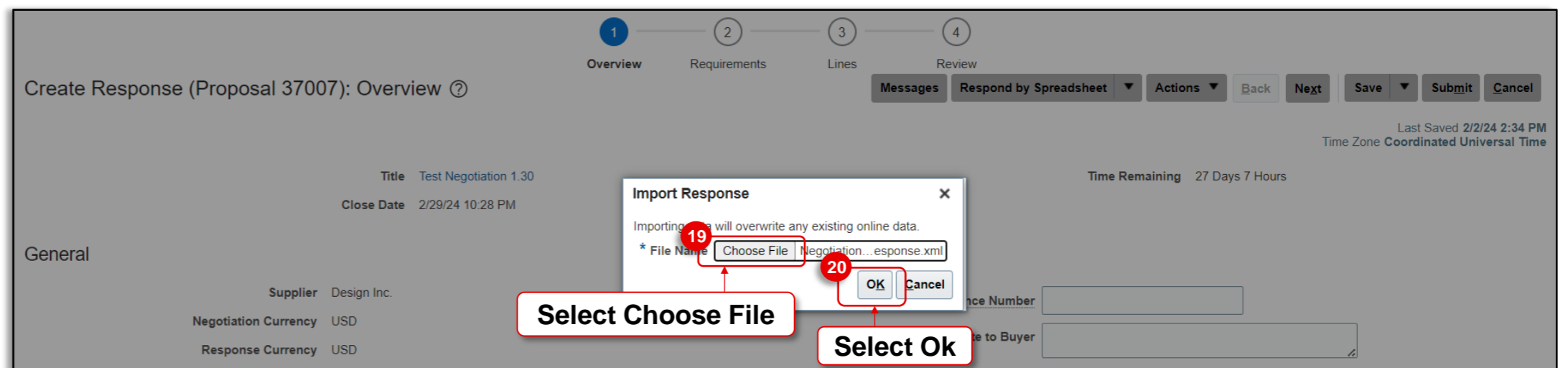
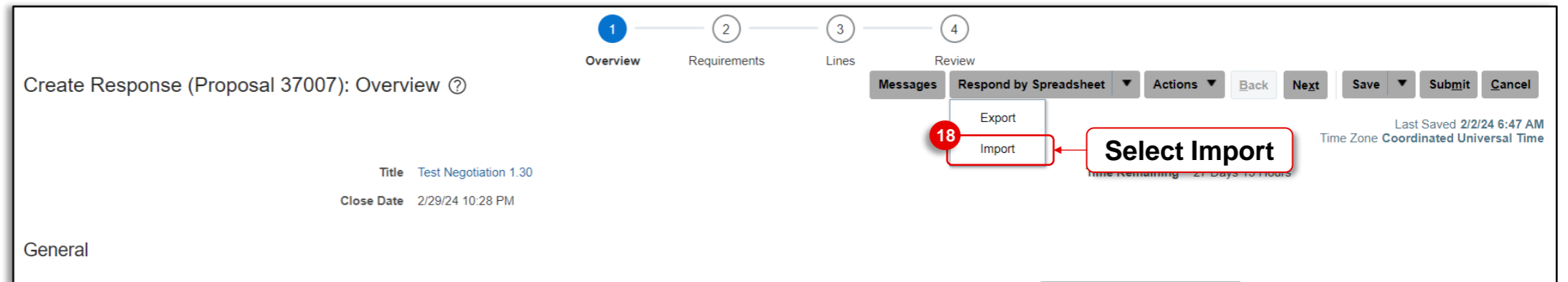
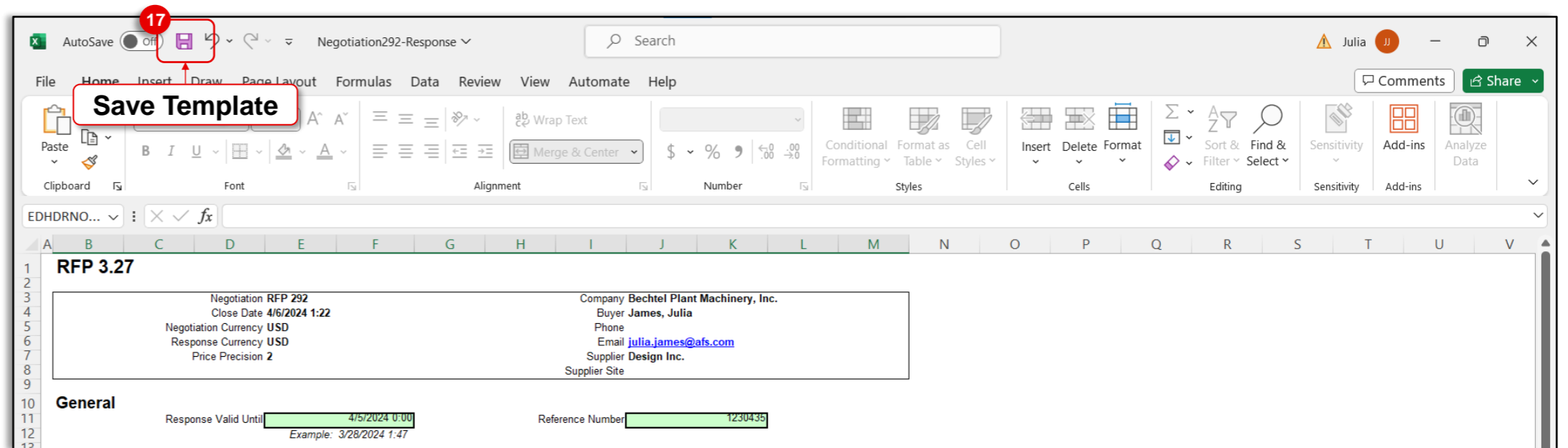


# Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

## Create Proposal via Spreadsheet – Import

17. After the template is complete, be sure to save the file to ensure the most updated version is being imported into the Supplier Portal.
18. To import the file, return to the Supplier Portal and select **Import** on the Create Response page.
19. The Import Response screen opens. Select **Choose File** and upload the document from the saved location.
20. Select **Ok** when finished. Fields completed on the spreadsheet are populated in the negotiation response. Review the response and upload any attachments prior to submission. Please refer to pages 20 and 22 of this training for information on how to do this.



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# NEGOTIATIONS – MANAGE RESPONSES

# Supplier Portal – Manage Responses

View and manage proposals.

## Manage Responses

1. Select the **Manage Responses** link on the Supplier Portal home page.
2. From the Manage Responses work area, a supplier is able to view all proposals submitted to BPMI by status. The following are the list of statuses that can be assigned to a response:
  - **Active:** Responses for ongoing (active) RFPs
  - **Active or Draft:** Submitted and draft responses for ongoing (active) RFPs
  - **Awarded:** Responses that were awarded
  - **Disqualified:** Responses that were disqualified in the evaluation process
  - **Draft:** Responses that are saved as draft (not submitted)
  - **Pending Award:** Submitted responses awaiting an award decision
  - **Rejected:** Responses that were not awarded

List continues on the next page

• Create Invoice Without PO  
• View Invoices  
• View Payments

**Negotiations**

- View Active Negotiations
- **Manage Responses**

**Qualifications**

- Manage Questionnaires
- View Qualifications

**Company Profile**

- Manage Profile

Manage Responses

Time Zone Coordinated Universal Time

Advanced Manage Watchlist Saved Search Active or Draft Responses

\*\* At least one is required

\*\* Negotiation Title  
\*\* Negotiation  
\*\* Response

Response Status Active or draft

Line Description

Search Reset Save...

Search Results

Revising a draft response automatically locks it.

Actions View Format Freeze Detach Wrap Accept Terms Revise

Response	Response Status	Negotiation	Negotiation Title	Negotiation Type	Time Remaining
36007	Draft	251	Test Negotiation 1.30	RFP	335 Days
5004	Active	29,1	Sample RFP 1.11.23	RFP	Not applicable
6004	Active	31,1	Demo RFP 11/16/23	RFP	Not applicable
22007	Active	191	Supplier RFP Test	RFP	Not applicable

Columns Hidden 8

# Supplier Portal – Manage Responses

View and manage proposals.

## Manage Responses

- **Resubmission Required:** Responses that must be updated and resubmitted because the RFP has been amended

**Note:** Please note the status “Awarded” does not mean that the action has been awarded in a purchase order to a supplier, but that BPMI has ended the RFP process and future communications will be provided by BPMI about the potential award decision.

3. Only responses in a Draft status can be edited. To edit a draft response, choose the appropriate response and select **Revise**.

All other submitted responses are view only within the Portal. When required, select the link in the Response field to view the details of the submitted proposal.

Search Results

Revising a draft response automatically locks it.

Actions View Format Freeze Detach Wrap Accept Terms Revise

Response	Response Status	Negotiation	Negotiation Title	Negotiation Type	Time Remaining
36007	Draft	251	Test Negotiation 1.30	RFP	335 Days
5004	Active	29,1	Sample RFP 1.11.23	RFP	Not applicable
6004	Active	31,1	Demo RFP 11/16/23	RFP	Not applicable
22007	Active	191	Supplier RFP Test	RFP	Not applicable

Columns Hidden 8

Manage Responses

Done

Time Zone Coordinated Universal Time

Advanced Manage Watchlist Saved Search Active or Draft Responses

\*\* At least one is required

\*\* Negotiation Title

\*\* Negotiation

\*\* Response

\*\* Response Status Active or draft

Line Description

Search Reset Save...

Search Results

Revising a draft response automatically locks it.

Actions View Format Freeze Detach Wrap Accept Terms Revise

Response	Response Status	Negotiation	Negotiation Title	Negotiation Type	Time Remaining
36007	Draft			RFP	335 Days
5004	Active	29,1	Sample RFP 1.11.23	RFP	Not applicable
6004	Active	31,1	Demo RFP 11/16/23	RFP	Not applicable
22007	Active	191	Supplier RFP Test	RFP	Not applicable

Columns Hidden 8

---

# PURCHASE ORDERS WORK AREA

# Supplier Portal – Purchase Order Work Area

Access the purchase order work area.

Within the Purchase Order Work Area, a supplier may:

- Acknowledge a Purchase Order
- Manage PO Lifecycle

See the following pages of this job aid for information on how to perform key tasks related to the purchase order.

The screenshot displays the Bechtel Plant Machinery, Inc. Supplier Portal. The header includes the company logo and tagline 'Quality, Integrity, Excellence'. The main content area is titled 'Supplier Portal' and features a search bar with a dropdown menu set to 'Orders' and an 'Order Number' input field. A navigation menu on the left lists tasks under 'Orders', 'Agreements', and 'Channel Programs'. The 'Acknowledge Schedules in Spreadsheet' link is highlighted with a red box and a callout that says 'Access the Purchase Order Work Area'. A central donut chart shows a total of 542 items, with segments for 363, 119, and 50. To the right, there are sections for 'Recent Activity' (Last 30 Days) and 'Transaction Reports' (Last 30 Days).

Recent Activity	
Last 30 Days	
Negotiation invitations	1
Orders changed or canceled	1
Orders opened	27

Transaction Reports	
Last 30 Days	
PO Purchase Amount	8.63M USD
Invoice Amount	1.08M USD
Invoice Price Variance Amount	0 USD

---

# **PURCHASE ORDERS – ACKNOWLEDGE PO**

# Supplier Portal – Acknowledge Purchase Order

Acknowledge and accept a purchase order.

## View/Acknowledge Purchase Order

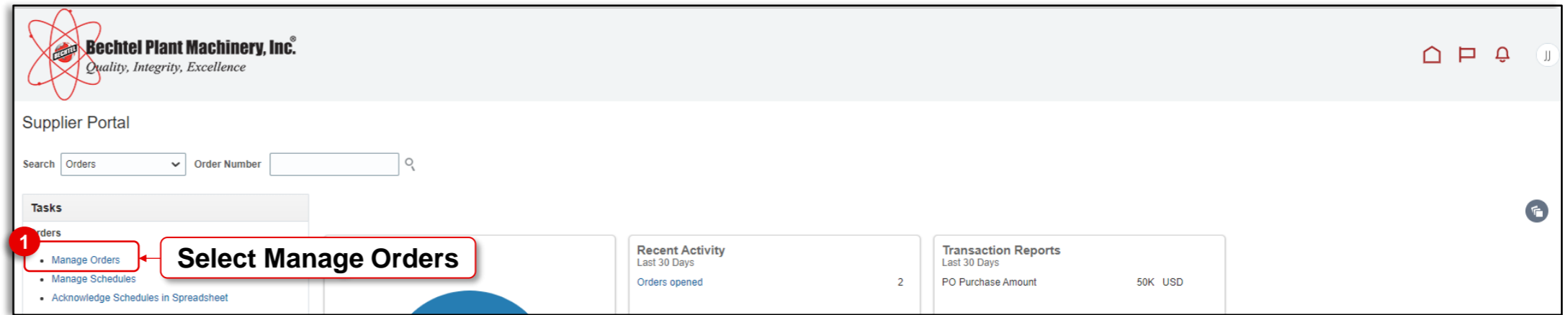
Within the Supplier Portal, a supplier can acknowledge and respond to purchasing documents and amendments.

All purchase orders requiring confirmation should be acknowledged within time frame specified on the PO.

1. Select the **Manage Orders** link on the Supplier Portal home page.

**Note:** A Supplier may also access purchase orders requiring acknowledgement using the **Notification Bell** and the **Requiring Attention** Infolet on the Supplier Portal home page.

2. On the **Manage Orders** page, search for the purchase order that requires acknowledgement. Complete at least one field required to perform the search.
3. Select **Search**.





# Supplier Portal – Acknowledge Purchase Order

Acknowledge and accept a purchase order.

## View/Acknowledge Purchase Order

- The results of the search populates in the search results section. Select the **purchase order** to acknowledge.
- The purchase order details display. Review the purchase order in its entirety. Navigate through the various sections of the PO (e.g., Header, Notes & Attachments, Lines, etc.)
- Once the review is complete, select **Acknowledge**.
- Enter a Supplier Order Number and an Acknowledgement Note, if applicable. Select **Accept**.

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
125			Main	James, Julia	25,000.00	USD	Open		8/9/22
121	8/16/22		Main	James, Julia	25,000.00	USD	Open		8/3/22

Purchase Order: 125

**General**

Sold-to Legal Entity: Bechtel Plant Machinery, Inc.  
Supplier: Julia's Inc.  
Ordered: 25,000.00 USD

Bill-to BU: BPMI - Operations Business Unit  
Supplier Site: Main  
Description: [Redacted]

Order: 125  
Supplier Contact: Julia James  
Source Agreement: [Redacted]

Status: Open  
Buyer: Julia James  
Bill-to Location: BPMI Headquarters  
Supplier Order: [Redacted]

Creation Date: 8/9/22  
Ship-to Location: BPMI Headquarters  
Master Contract: [Redacted]

Purchase Order: 125

**General**

Sold-to Legal Entity: Bechtel Plant Machinery, Inc.  
Supplier: Julia's Inc.  
Ordered: 25,000.00 USD

Acknowledge Revision 0

Supplier Order: [Input Field]

Acknowledgment Note: [Input Field]

**Accept** Cancel

---

# **PURCHASE ORDERS – MANAGE PO LIFECYCLE**

# Supplier Portal – Manage PO Lifecycle

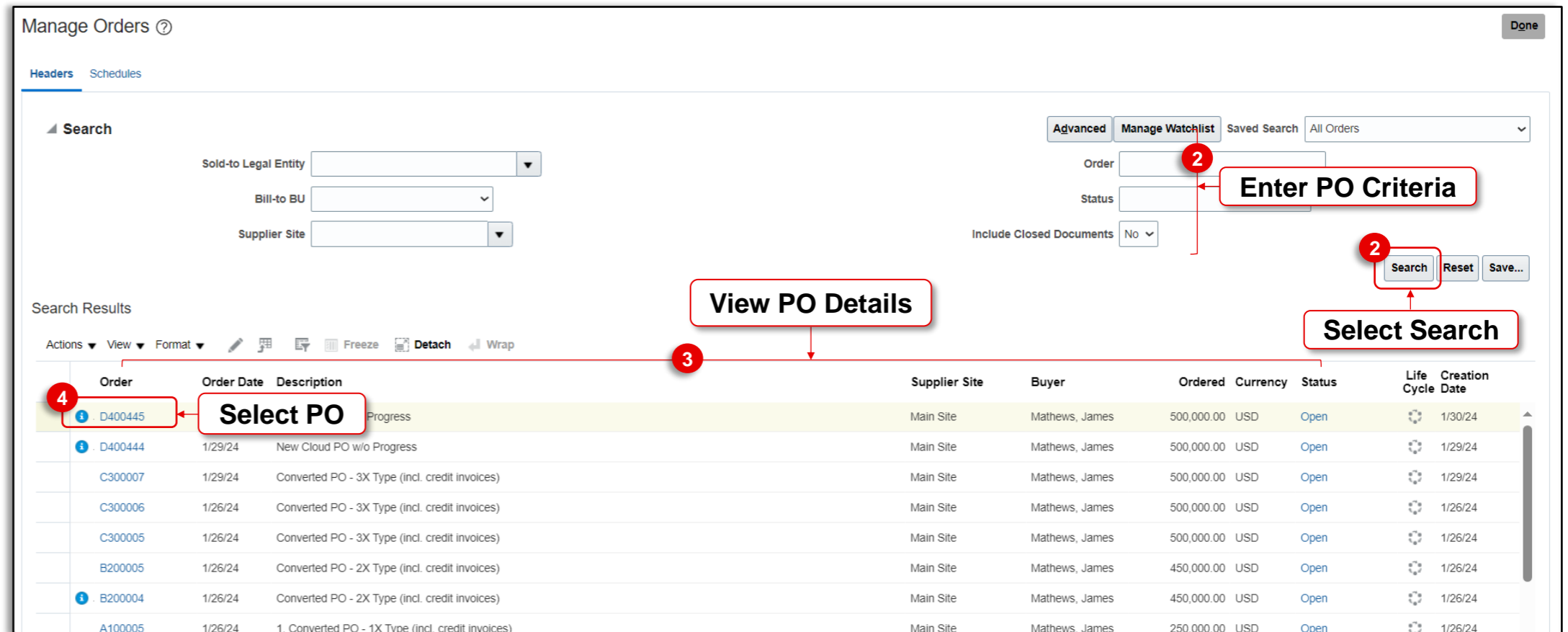
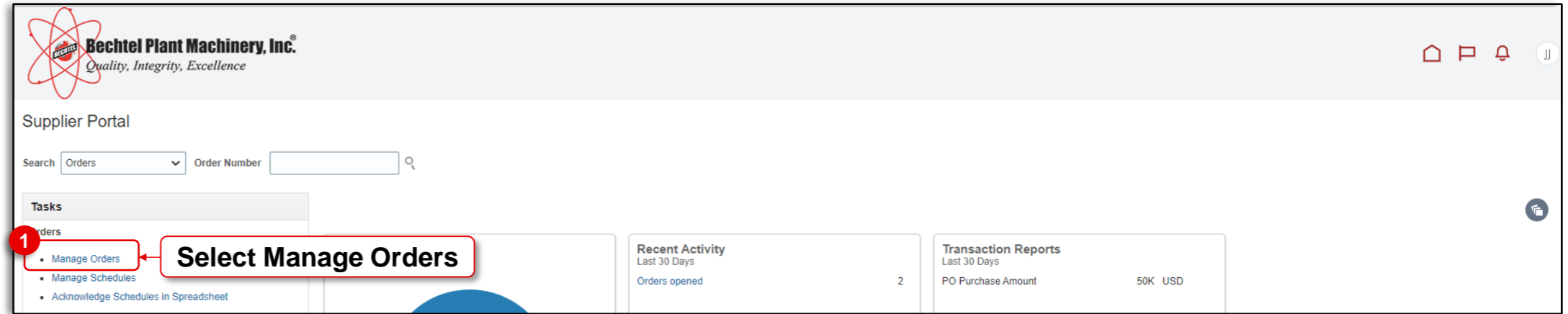
View and manage active purchase orders.

## Manage PO Life Cycle

1. Select the **Manage Orders** link on the Supplier Portal home page.
2. On the Manage Orders page, select **Search** to view all orders. Alternatively, search for a specific PO by entering details in the search criteria fields. When finished, select **Search** to populate the appropriate PO(s) in the Search Results section.
3. From the Search Results area, a supplier is able to view various details about the orders placed with BPMI. Details such as Order Number, Order Date, Buyer, Ordered Amount, Status, etc.

**Note:** By selecting **View** and clicking **Columns**, additional fields (e.g., Change Order Status, Revision, etc.) can be added to the Search Results section for viewing without having to open a particular order.

4. View details of a specific purchase order by selecting the appropriate link in the **Order** field.



# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

5. On the purchase order details page, in addition to viewing the details of the order, a supplier can do the following:
- **View Document History** (pg. 46)
  - **View Change History** (pg. 47 - 48)
  - **View Revision History** (pg. 49)
  - **View Order Lifecycle** (pg. 50)

The following pages of this job aid show how to do each of these actions.

BPMI Prime PO: D400273

Acknowledge Actions Refresh Done

Order Life Cycle

Ordered 44,002,510.00 USD

Review PO

View Details

Amount (USD)

0 10M 20M 30M 40M

General

Sold-to Legal Entity: Bechtel Plant Machinery, Inc. Supplier: Design Inc. Ordered: 44,002,510.00 USD

Bill-to BU: BPMI - Operations Business Unit Supplier Site: Main Address Description: Initial PO

Order: D400273 Supplier Contact: Austin Flynn Source Agreement: 106

Revision: 2 Bill-to Location: BPMI Headquarters Negotiation: Supplier Order

Status: Open Ship-to Location: BPMI Headquarters Master Contract

Buyer: Michael Fisher Creation Date: 11/21/23

Terms: Notes and Attachments

Note to Supplier Attachments

Lines Schedules

Line	Type	Item	Description	Quantity	UOM	Base Price	Discount Type	Discount	Discount Reason	Price	Ordered	Status	Loc: Reque Deliver
1	Government Inf...		Sample Item 1	5,100,...	EA	1.00				1.00	5,100,00...	Open	B...
2	Government Inf...		Sample Item 2	2,000	EA	13,000.00				13,000.00	26,000,0...	Open	B...
3	Government Inf...		Sample Item 3	12,200...	EA	1.00				1.00	12,200,0...	Open	B...

# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

### Document History

6. To access an order's document history, select the **Actions** button and choose **View Document History** from the list.
7. On the Document History page, review the sequential list of all actions taken against the order. Details on this page include, Action, Performed By, Action Date, etc.
8. When finished, select **Done** to return to the Purchase Order Details page.

BPMI Prime PO: D400273

Acknowledge Actions Refresh Done

Edit  
Cancel Document  
View Document History  
View Change History  
View Revision History

**Select View Document History**

Order Life Cycle

View Details

Amount (USD)

0 10M 20M 30M 40M

View Details

Note to Supplier

Attachments

Document History: D400273

Buyer Michael Fisher  
Sold-to Legal Entity Bechtel Plant Machinery, Inc.  
Order D400273  
Description Initial PO

Supplier Design Inc.  
Supplier Site Main Address  
Status Open

View Format Freeze Detach Wrap

Action	Performed By	Action Date	Additional Information
Change Order 2	Michael Fisher	11/21/23 4:22 PM	Update
Implement Revision 2		11/21/23 4:29 PM	Update
Change Order 1	Michael Fisher	11/21/23 4:01 PM	Update
Original Document	Michael Fisher	11/21/23 3:41 PM	

**Select Done**

**Review Document History**

# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

### Change History

- To access an order's change history (i.e., Amendments), select the **Actions** button and choose **View Change History** from the list.
- On the Change History page, review change history. Details on this page include, Change Order Number, Description, Initiating Party, etc.
- To see the specifics of a change order, select the **link** in the Description field.
- On the Review Changes page, review the changes made to the purchase order. Each changed attribute is listed to display both the original value and the changed value. Note that the blue circles indicate the areas within the order where a change was made.

BPMI Prime PO: D400273

Actions

- Edit
- Cancel Document
- View Document History
- View Change History
- View Revision History

Select View Change History

Change History: D400273

Currency = US Dollar

Change Order	Description	Resulting Revision	Creation Date	Initiating Party	Initiator	Proposed Amount Change	Amount Changed	Status
2	Update	2	11/21/23	Buyer	Michael Fisher	+100.00	+100.00	Processed
1	Update	1	11/21/23	Buyer	Michael Fisher	+100,000.00	+100,000.00	Processed

Review Change History

Select Link

Review Changes: 2

Currency = US Dollar

Change Order 2

Creation Date 11/21/23

Initiating Party Buyer

Description Update

Status Processed

Initiator Michael Fisher

Attribute	Changed From	Changed To
Total (USD)	44,002,410.00	44,002,510.00
Ordered (USD)	44,002,410.00	44,002,510.00

Review Change

# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

### Change History

- When finished, select **Done** to return to the Change History page.
- Select **Done** to return to the Purchase Order Details page.

Review Changes: 2

Currency = US Dollar

Change Order 2      Creation Date 11/21/23      Initiating Party Buyer

Description Update      Status Processed      Initiator Michael Fisher

● Main ● Contract Terms

General

View Format Freeze Detach Wrap

Attribute	Changed From	Changed To
Total (USD)	44,002,410.00	44,002,510.00
Ordered (USD)	44,002,410.00	44,002,510.00

Change History: D400273

Currency = US Dollar

Actions View Format Freeze Detach Wrap

Change Order	Description	Resulting Revision	Creation Date	Initiating Party	Initiator	Proposed Amount Change	Amount Changed	Status
2	Update	2	11/21/23	Buyer	Michael Fisher	+100.00	+100.00	Processed
1	Update	1	11/21/23	Buyer	Michael Fisher	+100,000.00	+100,000.00	Processed

# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

### Revision History

15. To access an order's revision history, select the **Actions** button and choose **View Revision History** from the list.

16. On the Revision History page, review revision details. Details on this page include, Revision Number, Change Order Number, Description, Initiating Party, etc.

**Note:** To see specifics of a change order, select the link in the Description field to access the Review Changes page.

17. When finished, select **Done** to return to the Purchase Order Details page.

BPMI Prime PO: D400273

Acknowledge Actions Refresh Done

Edit  
Cancel Document  
View Document History  
View Change History  
View Revision History

Order Life Cycle

Ordered

Amount (USD)

View Details

Sold-to Legal Entity: Bechtel Plant Machinery, Inc. Supplier: Design Inc.  
Bill-to BU: BPMI - Operations Business Unit Supplier Site: Main Address  
Order: D400273 Supplier Contact: Austin Flynn  
Revision: 2 Bill-to Location: BPMI Headquarters  
Status: Open Ship-to Location: BPMI Headquarters  
Buyer: Michael Fisher  
Creation Date: 11/21/23

Ordered: 44,000.00  
Description: Initial PO  
Source Agreement: 106  
Negotiation  
Supplier Order  
Master Contract

Revision History: D400273

Currency = US Dollar

Review Revision History

Actions View Format Freeze Detach Wrap Done

Revision	Change Order	Description	Creation Date	Initiating Party	Initiator	Amount Changed
2	2	Update	11/21/23	Buyer	Michael Fisher	+100.00
1	1	Update	11/21/23	Buyer	Michael Fisher	+100,000.00
0		Initial PO	11/21/23	Buyer	Michael Fisher	+43,902,410.00

Select Done



# Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

## Manage PO Life Cycle

### Order Life Cycle

18. To access an order's lifecycle, select the **View Details** button on the Order Lifecycle Infolet.

19. On the Order Life Cycle page, track the fulfillment status of the purchase order. Review in-transit shipments, shipped amounts, receipts and invoices. Specific details of the transactions can be viewed by selecting the applicable hyperlinks on the page.

20. When finished, select **Done** to return to the Purchase Order Details page.

The screenshot shows the 'BPMI Prime PO: D400273' page. On the right side, there is an 'Order Life Cycle' infolet. It contains a bar chart with a single blue bar representing the 'Ordered' amount of 44,002,510.00 USD. Below the chart is a 'View Details' button, which is highlighted with a red circle and a callout box labeled '18' containing the text 'Select View Details'. The main content area shows general information for the purchase order, including 'Sold-to Legal Entity' (Bechtel Plant Machinery, Inc.), 'Supplier' (Design Inc.), 'Order' (D400273), and 'Status' (Open).

The screenshot shows the 'Order Life Cycle: D400155' page. It features a bar chart titled 'Order Life Cycle' with two bars: a blue bar for 'Ordered' (250,000.00 USD) and a purple bar for 'Invoiced' (250,000.00 USD). To the right of the chart is a 'Done' button, highlighted with a red circle and a callout box labeled '20' containing the text 'Select Done'. Below the chart is a table of invoices. A red line with a callout box labeled '19' containing the text 'Review Order Life Cycle' points to the 'Invoices' section.

Invoice	Invoice Date	Status	Invoice Total	Paid	Matched Amount	Receipt	Packing Slip
D400155a	9/18/23	Validated	150,000.00	0.00	150,000.00		
D400155	9/18/23	Validated	100,000.00	0.00	100,000.00		

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# INVOICE & PAYMENTS WORK AREA

# Supplier Portal – Invoices & Payments Work Area

Access the invoice and payments work area.

Within the Invoice and Payments work area, a supplier may:

- View Invoices
- View Payments

See the following pages of this job aid for information on how to perform key tasks related to invoices.

The screenshot displays the Supplier Portal interface. On the left is a navigation menu with sections: Agreements, Channel Programs, Shipments, Contracts and Deliverables, Consigned Inventory, and Invoices and Payments. The 'Invoices and Payments' section includes links for 'Create Invoice', 'Create Invoice Without PO', 'View Invoices', and 'View Payments'. A red callout box with the text 'Access the Invoices and Payments Work Area' points to the 'View Invoices' link.

The main dashboard area features a 'Requiring Attention' donut chart with a total of 895 items. The chart is divided into five categories: Agreements to Acknowledge (354), Orders to Acknowledge (50), Contract Deliverables Overdue (3), Schedules Overdue or Due Today (363), and Questionnaires (3). To the right of the chart are two summary boxes: 'Recent Activity Last 30 Days' showing 26 'Orders opened', and 'Transaction Reports Last 30 Days' showing an 'Invoice Amount' of 1.01M USD and an 'Invoice Price Variance Amount' of 0 USD.

At the bottom of the dashboard is a 'Supplier News' section with a welcome message and a link to supplier training materials.

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# VIEW INVOICES

# Supplier Portal – View Invoices

Track the status of submitted invoices.

## View Invoices

1. Select the **View Invoices** link on the Supplier Portal home page.
2. Search for invoices by entering details in the search criteria fields. At least one of the fields marked with blue asterisks must be complete prior to performing the search.
3. Select **Search**.

Supplier Portal

Requiring Attention

Recent Activity Last 30 Days

Transaction Reports Last 30 Days

895

354 50 363 3

Agreements to Acknowledge  
Orders to Acknowledge  
Contract Deliverables Overdue  
Schedules Overdue or Due Today  
Questionnaires  
Invoices Overdue

Supplier News

Welcome to the BPMI Supplier Portal. As an approved supplier contact you will have access to update profile information, review purchasing documents, submit invoices, and track payment statuses. Please use the link below to download instructional training materials.

<Add link to supplier training guide>

For inquires, please contact Suppliers@BPMI.com

1 Select View Invoices

View Invoices

Advanced Saved Search All Invoices

\*\* At least one is required

\*\* Invoice Number

\*\* Supplier

Supplier Site

\*\* Purchase Order

Consumption Advice

Invoice Status

Paid Status

Payment Number

Search Reset Save...

3 Select Search

2 Enter Invoice Criteria

Search Results

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number	Comment
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# Supplier Portal – View Invoices

Track the status of submitted invoices.

## View Invoices

- The results of the search populates in the Search Results section. There, a supplier is able to view various details about the invoice. Details such as Invoice Number, Invoice Date, Type, Purchase Order, Invoice Amount, etc.
- View details of a specific invoice by selecting the link in the **Invoice Number** field.
- Invoice information displays. Header details display at the top of the page. The **Lines** tab display the PO lines matched to the invoice (if applicable to the invoice). The **Totals** section display the total breakdown of the invoice.
- Select the **Payments** tab to view details of the payments for the invoice.

**View Invoices**

Search filters: \*\* Invoice Number, \*\* Supplier (Design Inc.), Supplier Site, \*\* Purchase Order, Consumption Advice, Invoice Status, Paid Status, Payment Number.

Search Results Table:

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payr Num	Comments
C300005STD				Design Inc.	Main Site	1,000.00 USD	1,000.00 USD	In process		
D400444CR	1/30/24	Credit memo	D400444	Design Inc.	Main Site	-10.00 USD	-10.00 USD	Approved		
D400445	1/30/24	Standard	D400445	Design Inc.	Main Site	100,000.00 USD	100,000.00 USD	Approved		

**Invoice: 497-1**

Header Details: Business Unit (BPMI - Operations Business Unit), Legal Entity Name (Bechtel Plant Machinery, Inc.), Supplier (Design Inc.), Invoice Amount (1,635.00 USD), Unpaid Amount (0.00 USD), Payment Currency (USD), Tax Control Amount.

**Review Invoice**

Invoice Type: Standard, Description, Funds Status: Not applicable, Attachment: None.

**Select Payments**

Items Table:

Line	Amount	Description	Budgetary Control		Quantity	Unit Price	UOM Name	Purchase Order			Receipt		Consumption Advice		Tax Determinants
			Budget Date	Funds Status				Number	Line	Schedule	Number	Line	Number	Line	
1	450.00	Item 1	3/12/23	Not applicable	10	45	EA	497	1	1					BPMI Headquarters
2	225.00	Item 1	3/12/23	Not applicable	5	45	EA	497	1	2					BPMI Headquarters
3	720.00	Item 2	3/12/23	Not applicable	12	60	EA	497	2	1					BPMI Headquarters
4	240.00	Item 2	3/12/23	Not applicable	4	60	EA	497	2	2					BPMI Headquarters

# Supplier Portal – View Invoices

Track the status of submitted invoices.

## View Invoices

8. If an invoice has been paid, payment information can be viewed in this section. Review details such as Payment Number, Payment Date, Paid Amount, etc.

**Note:** Select the link in the **Number** column to access specific payment made to the invoice.

9. When finished reviewing the invoice, select **Done**.

Invoice: 497-1

Business Unit: BPMI - Operations Business Unit  
Legal Entity Name: Bechtel Plant Machinery, Inc.  
Supplier or Party: Design Inc.  
Supplier Site: Main Address  
Address: 1 Main Street, Atlanta, GA 30319  
Invoice Date: 3/12/23

Invoice Amount: 1,635.00 USD  
Payment Currency: USD  
Tax Control Amount

Invoice Type: Standard  
Description:  
Funds Status:  Not applicable  
Attachment: None

Done

Select Done

Review Payments

Lines: Payments

Number	Payment Document	Status	Reconciled	Payment Date	Paid Amount	Address	Remit-to Account
100006	ACH	Negotiable	No	4/3/23	1,635.00 USD	1 Main Street, Atlanta, GA 30319	XXXXX9200
					1,635.00 USD		

Number	Due Date	Amount (USD)		Payment Method
		Gross	Unpaid	
1	4/11/23	1,635.00	0.00	Electronic
		1,635.00	0.00	

Number	Purchase Order	Applied Amount (USD)		Description
		Tax	Item	

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# VIEW PAYMENTS



# Supplier Portal – View Payments

Track the status of payments.

## View Payments

1. Select the **View Payments** link on the Supplier Portal home page.
2. Search for payments by entering details in the search criteria fields. At least one of the fields marked with blue asterisks must be complete prior to performing the search.
3. Select **Search**.

The screenshot shows the Supplier Portal home page. On the left is a navigation menu with sections: Agreements, Channel Programs, Shipments, Contracts and Deliverables, Consigned Inventory, and Invoices and Payments. The 'View Payments' link under 'Invoices and Payments' is circled in red with a '1' and a callout box that says 'Select View Payments'. The main content area features a 'Requiring Attention' donut chart with a total of 895, a 'Recent Activity' table showing 26 'Orders opened', and 'Transaction Reports' for the last 30 days. A 'Supplier News' section is also visible.

The screenshot shows the 'View Payments' search interface. It includes a search bar with a 'Done' button, a 'Search' section with fields for Payment Number, Payment Status, Payment Amount, Supplier, Supplier Site, and Payment Date. The search criteria fields are highlighted with a red box and a callout labeled 'Enter Payment Criteria'. The 'Search' button is highlighted with a red box and a callout labeled 'Select Search'. Below the search criteria is a 'Search Results' section with a table header: Payment Number, Payment Date, Payment Type, Invoice Number, Supplier, Supplier Site, Payment Amount, Payment Status, and Remit-to Account.

# Supplier Portal – View Payments

Track the status of payments.

## View Payments

- The results of the search populates in the Search Results section. There, a supplier is able to view various details about the payment. Details such as Payment Number, Payment Date, Payment Type, Invoice Number, Payment Amount, etc.
- View details of a specific payment by selecting the link in the **Payment Number** field.
- Payment details display. General payment details display in the header. The Paid Invoices section display the list of invoices paid for the payment number selected.
- When finished reviewing the payment, select **Done**.

**Note:** Select the link in the **Number** column to access invoice details specific to the payment.

View Payments

Search

Advanced Saved Search All Payments

\*\* At least one is required

\*\* Payment Number

Payment Status

Payment Amount

\*\* Supplier Design Inc.

Supplier Site

Payment Date m/d/yy

Search Reset Save...

Search Results

View Detach

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
1005	12/15/23	Manual	INV-1215-006	Design Inc.	Main Site	100.00 USD	Negotiable	
1010	12/15/23	Manual	INV-1215-006	Design Inc.	Main Site	100.00 USD	Negotiable	
9922	8/29/23	Quick	test111522-1	Design Inc.	Main Site	1.00 USD	Voided	
9923	8/29/23	Quick	test111522-1	Design Inc.	Main Site	1.00 USD	Negotiable	
100010	4/27/23	Payment Process Re...	042423-1	Design Inc.	Main Site	0.26 USD	Negotiable	XXXXXX3112
100011	4/27/23	Payment Process Re...	042423-27	Design Inc.	Main Site	0.02 USD	Negotiable	XXXXXX3112

Payment: 100009

Business Unit BPMI - Operations Business Unit

Payee Design Inc.

Payee Site Main Site

Address 1 Main Street, Atlanta, GA 30319

Payment Status Negotiable

Payment Amount 540.00 USD

Payment Date 4/20/23

Payment Type Payment Process Request

Remit-to Account XXXXXX3112

Payment Document ACH

Paid Invoices

Number	Invoice Date	Type	Purchase Order	Receipt	Consumption Advice	Paid Amount	Invoice Amount	Invoice Status	Due Date	Paid Status
110322	2/20/23	Standard				540.00 USD	540.00 USD	Manually a...	2/28/23	Fully paid