Supplier Portal

Oracle Procurement Cloud Job Aid

Last Updated: May 2024

Supplier Portal

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

SIGN IN & EXPLORE

Supplier Portal – Sign in & Explore

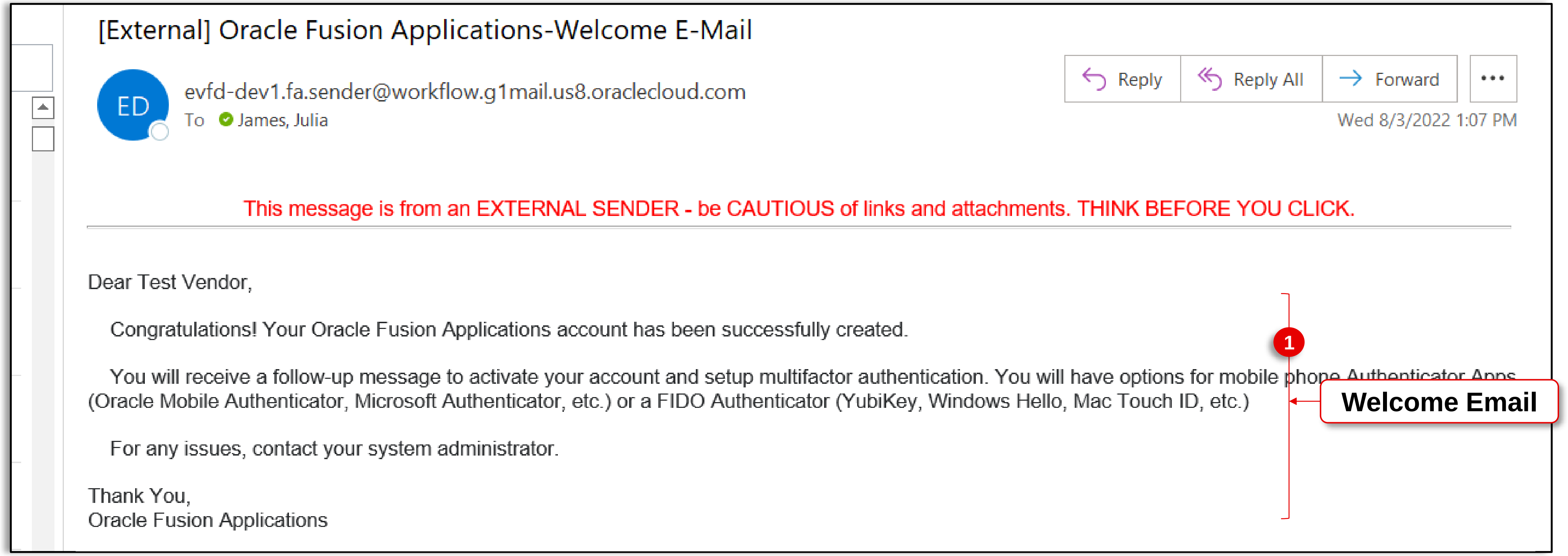
Login to the Supplier Portal.

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 for help with an expired activation request.*


[External] Oracle Fusion Applications-Welcome E-Mail

ED evfd-dev1.fa.sender@workflow.g1mail.us8.oraclecloud.com

To James, Julia

Reply Reply All Forward

Wed 8/3/2022 1:07 PM

This message is from an EXTERNAL SENDER - be CAUTIOUS of links and attachments. THINK BEFORE YOU CLICK.

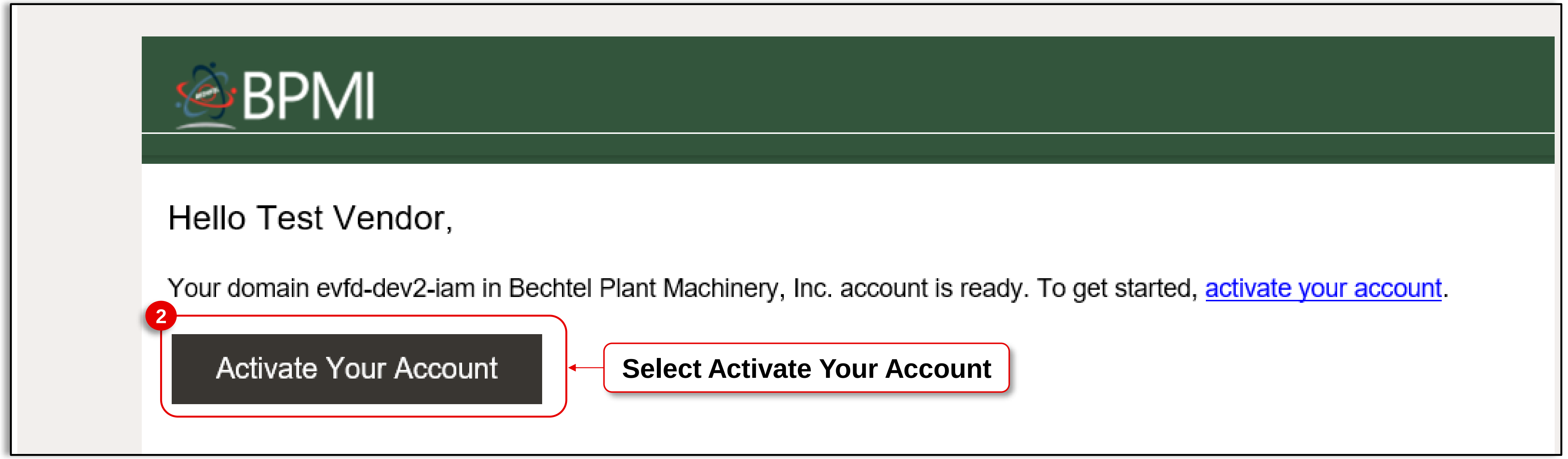
Dear Test Vendor,

Congratulations! Your Oracle Fusion Applications account has been successfully created.

You will receive a follow-up message to activate your account and setup multifactor authentication. You will have options for mobile phone Authenticator Apps (Oracle Mobile Authenticator, Microsoft Authenticator, etc.) or a FIDO Authenticator (YubiKey, Windows Hello, Mac Touch ID, etc.)

For any issues, contact your system administrator.

Thank You,
Oracle Fusion Applications


BPMI

Hello Test Vendor,

Your domain evfd-dev2-iam in Bechtel Plant Machinery, Inc. account is ready. To get started, activate your account.

Activate Your Account

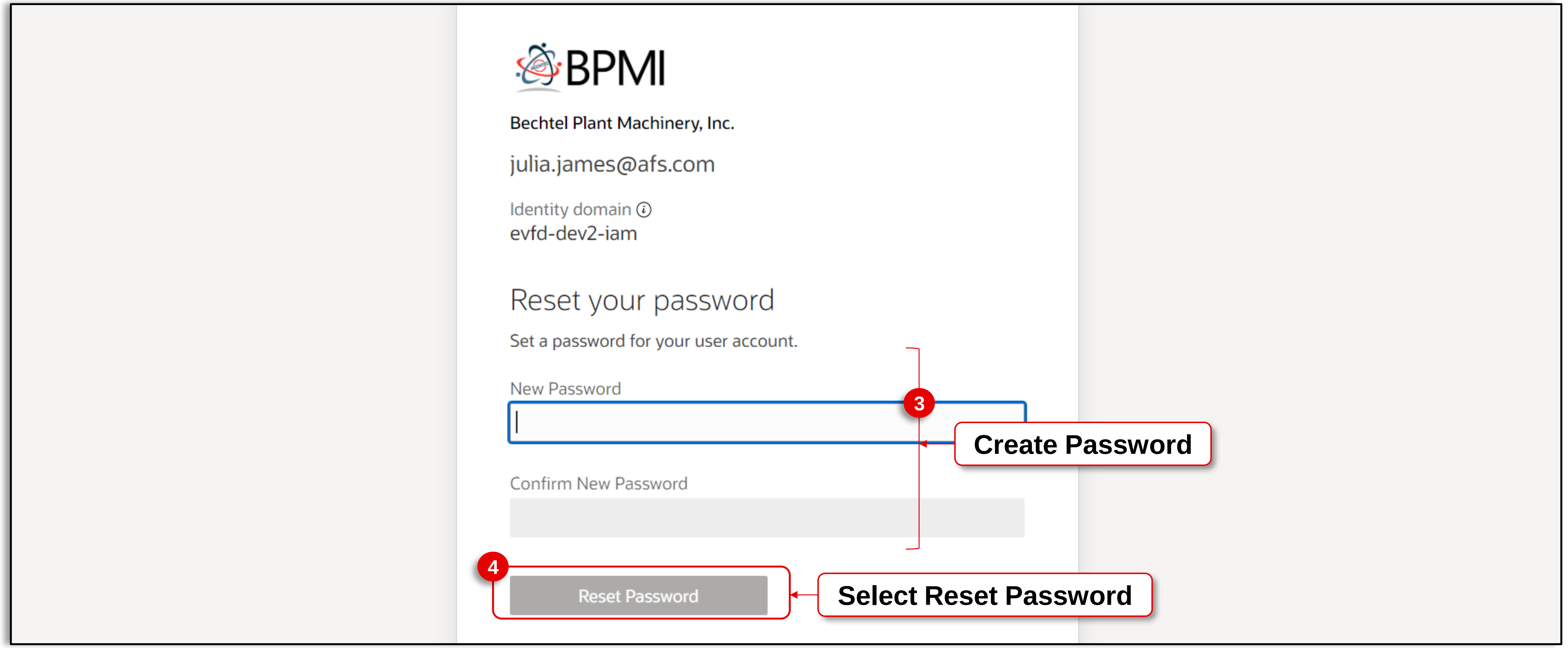
Supplier Portal – Sign in & Explore

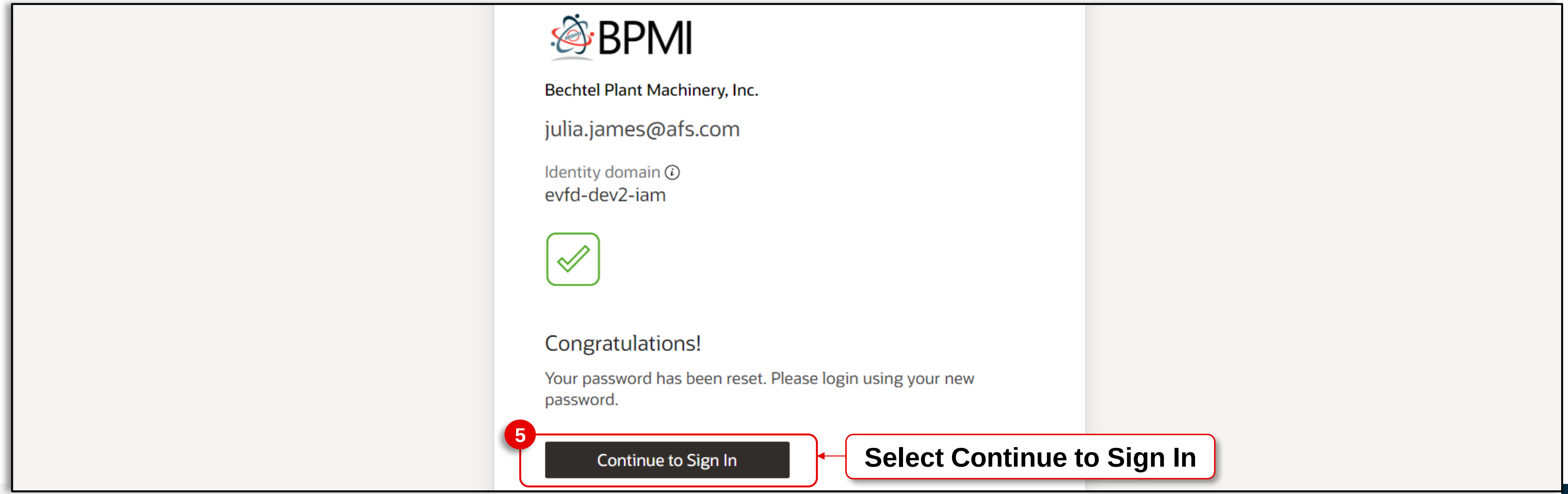
Login to the Supplier Portal.

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**.





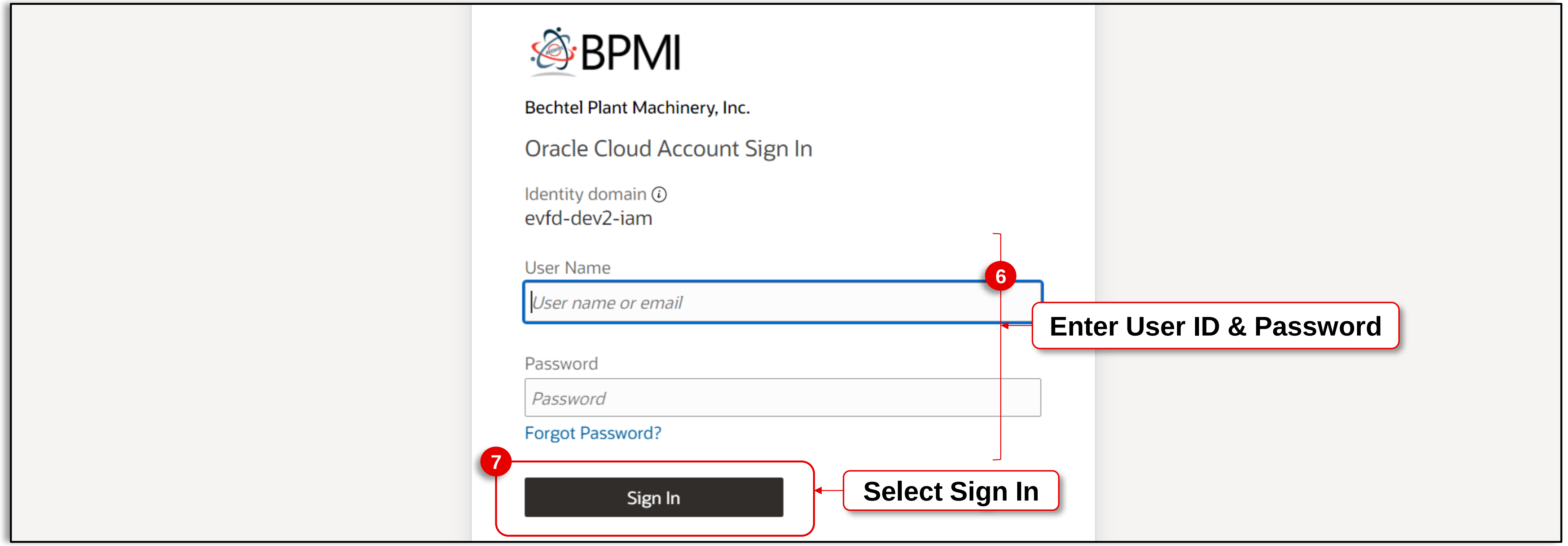
Supplier Portal – Sign in & Explore

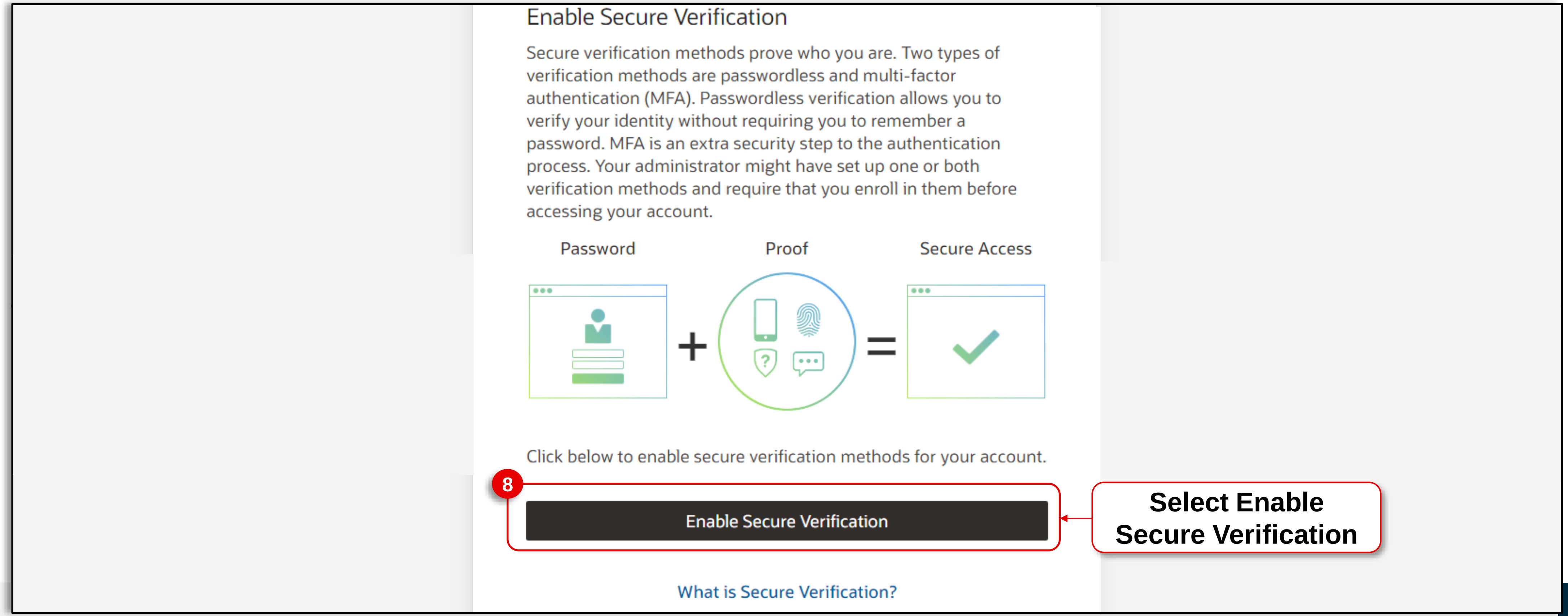
Login to the Supplier Portal.

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**.



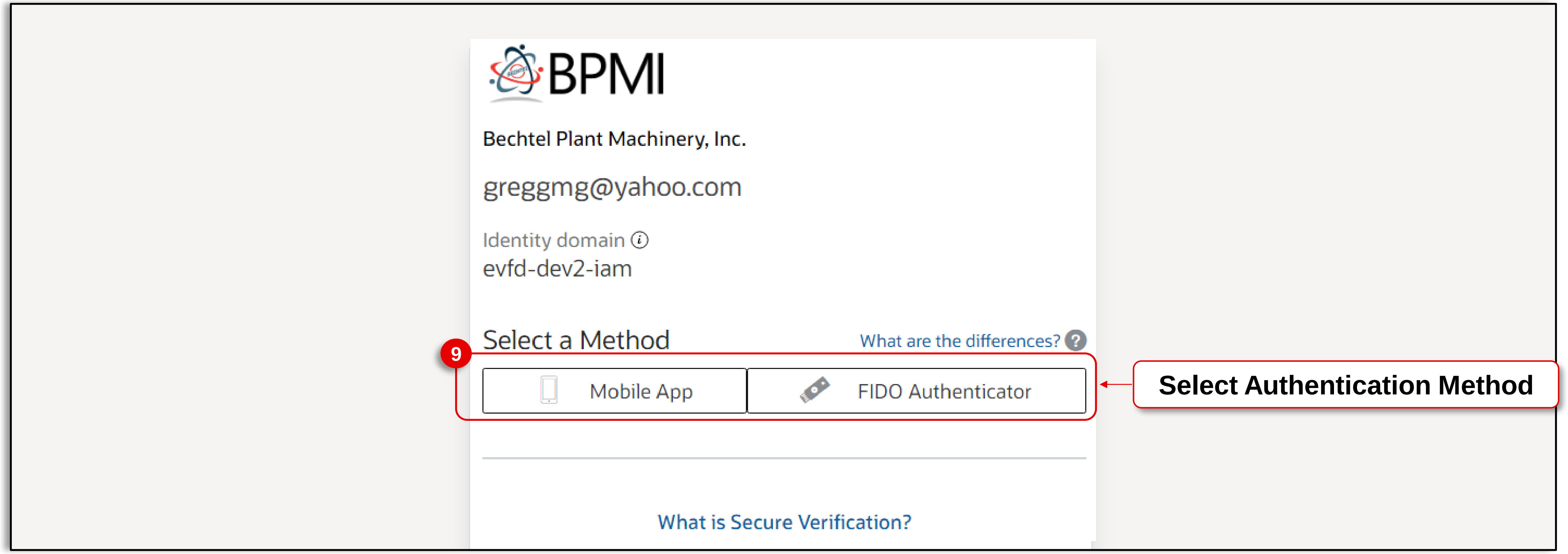


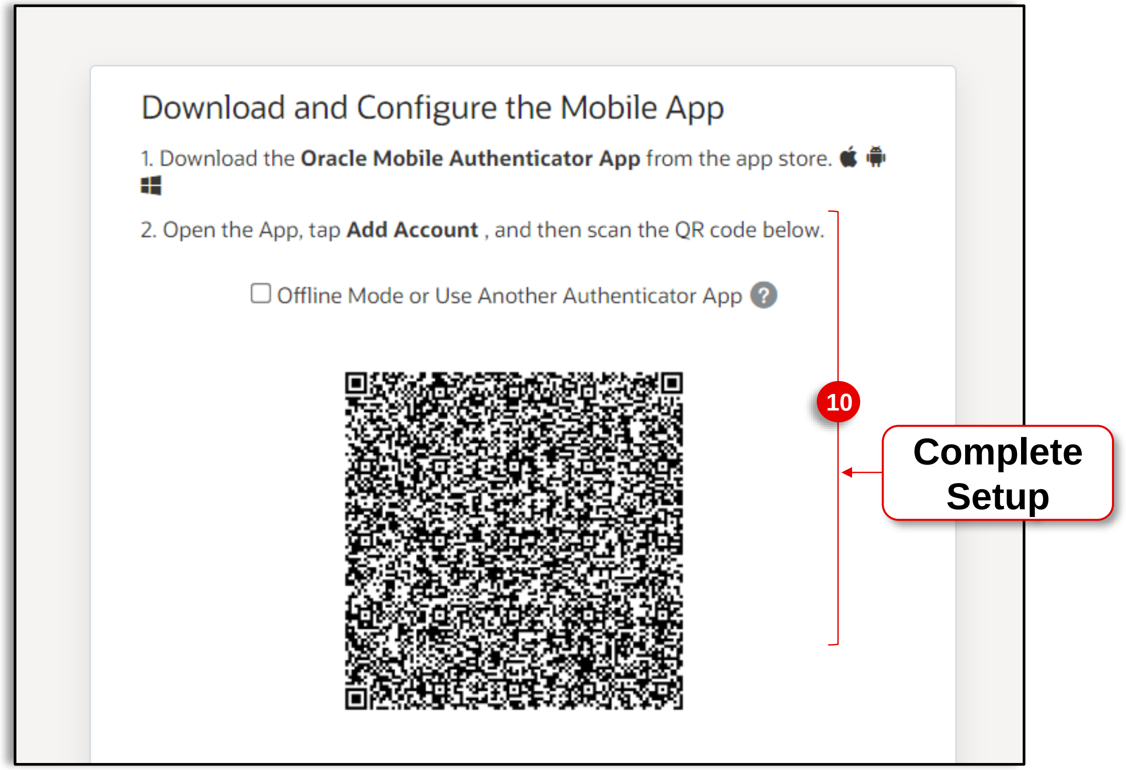
Supplier Portal – Sign in & Explore

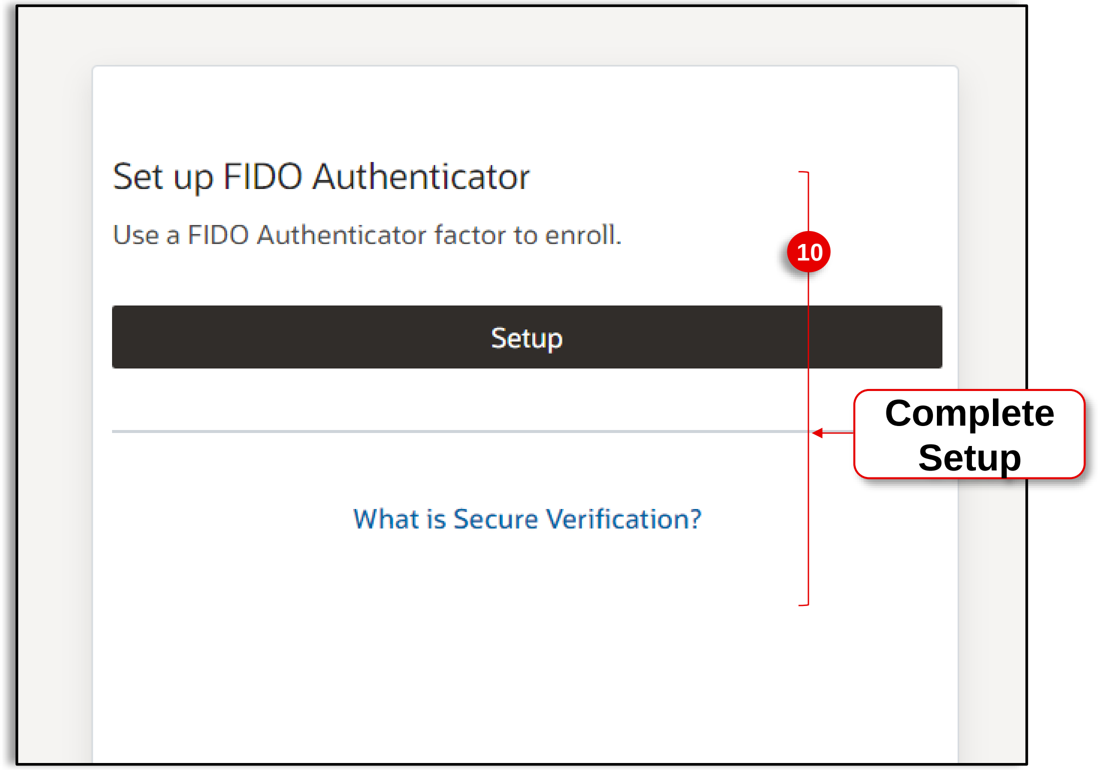
Login to the Supplier Portal.

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.





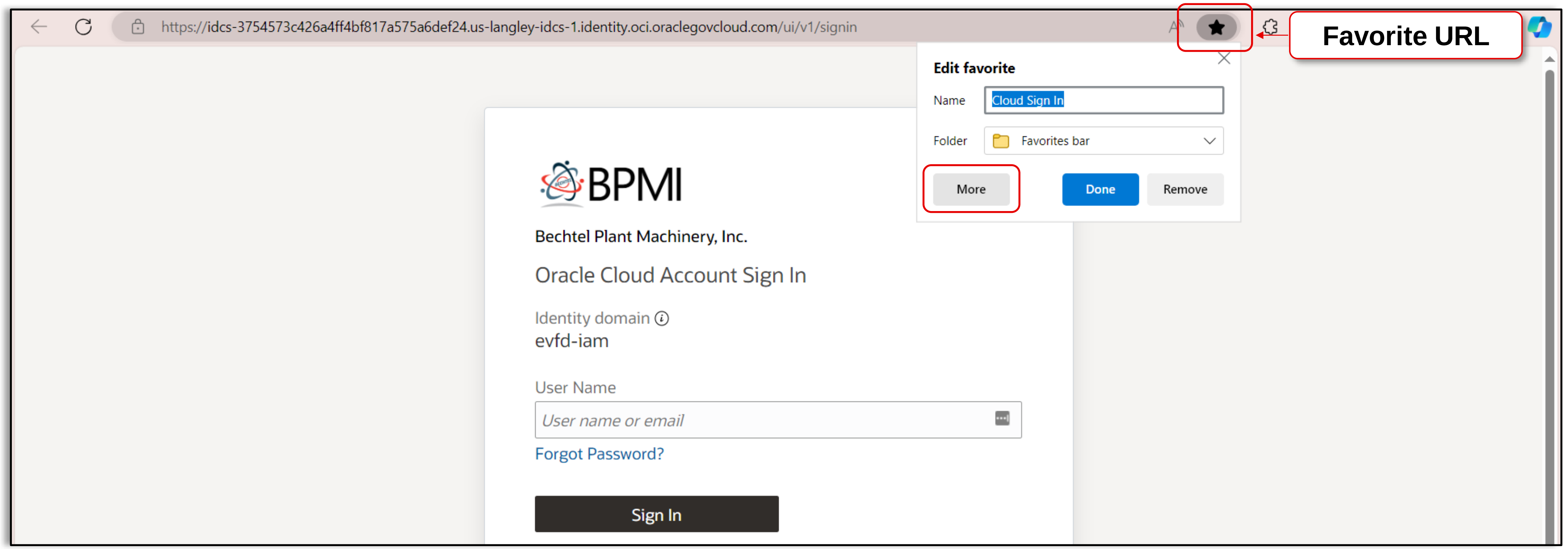


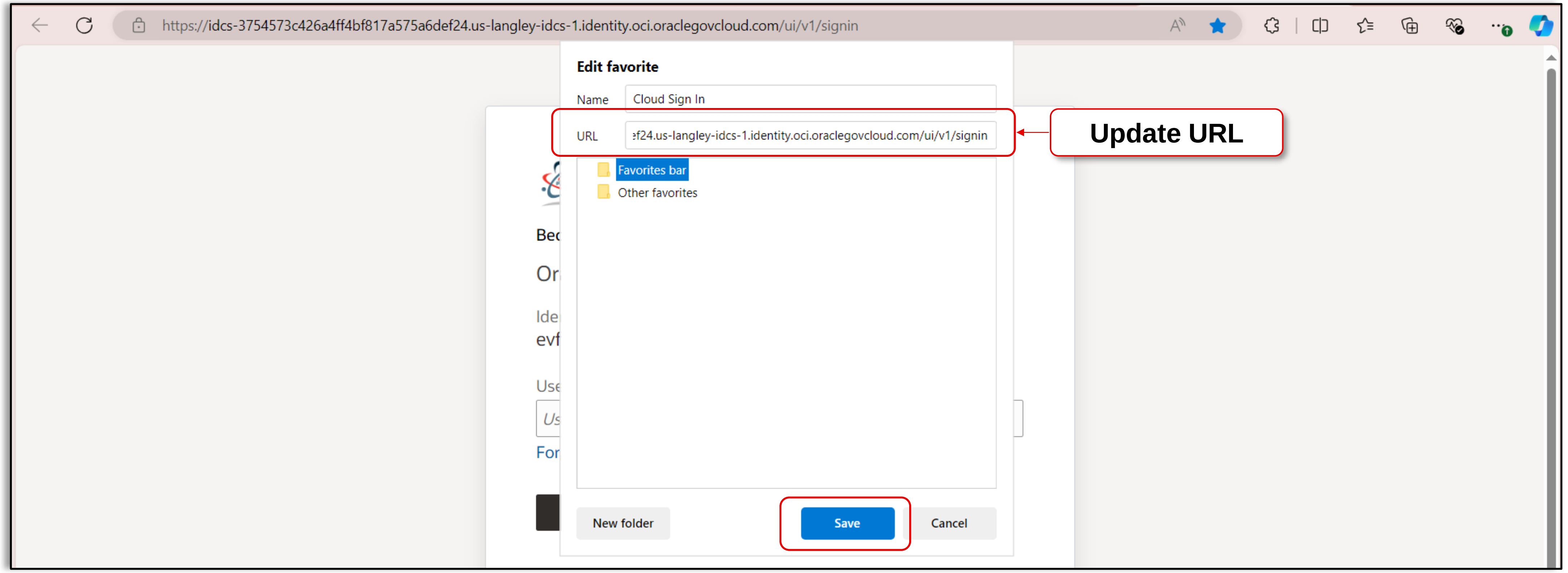
Supplier Portal – Sign in & Explore

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.

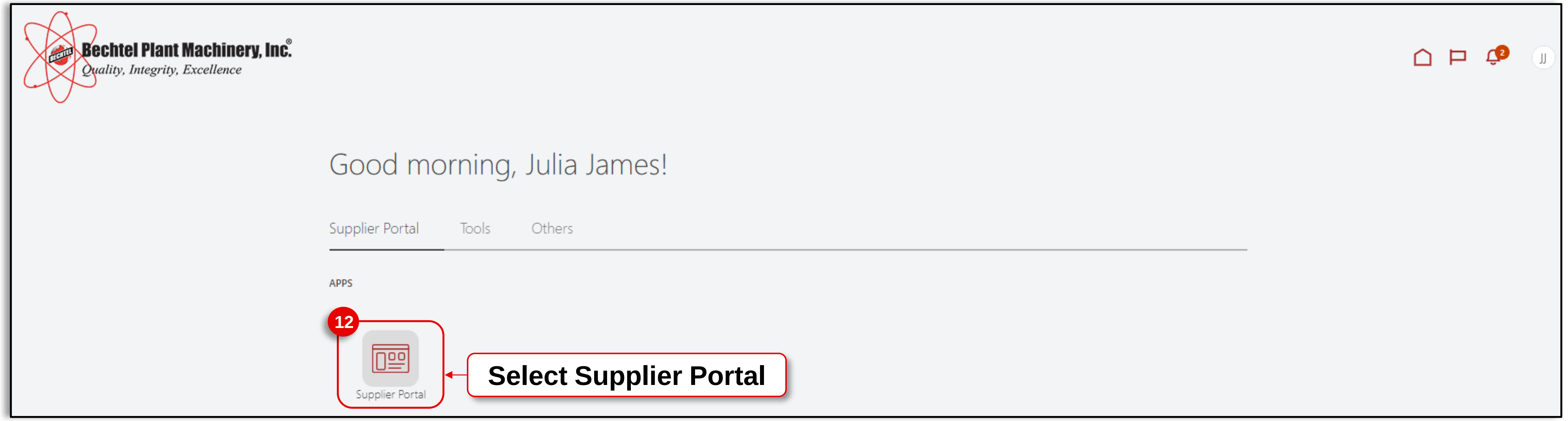
12. Once successfully logged in, the Oracle Cloud home page will show. Select the **Supplier Portal** tile.

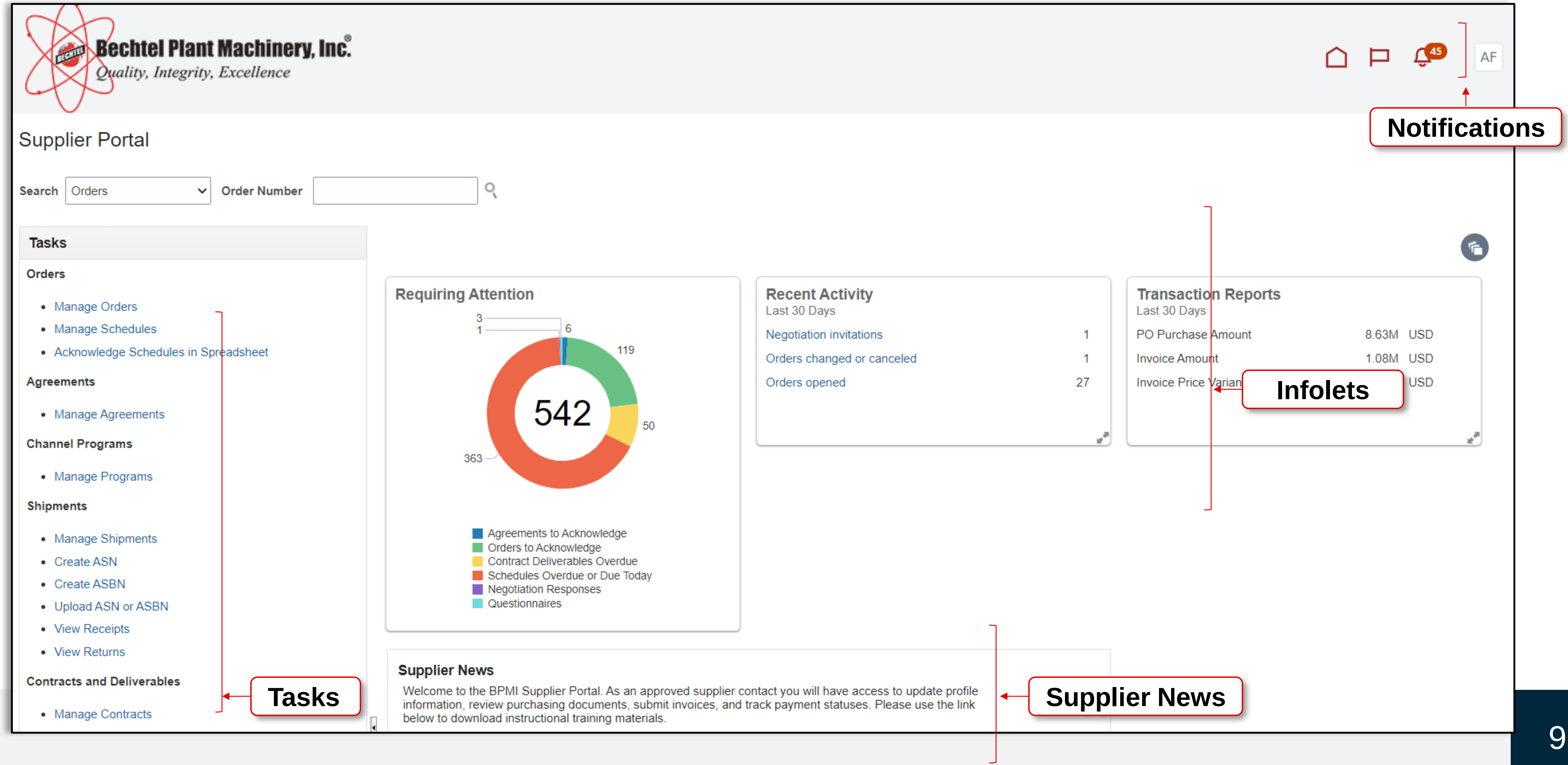
13. Key features of the Supplier Portal home page are explained below.

    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.*





MANAGE SUPPLIER PROFILE

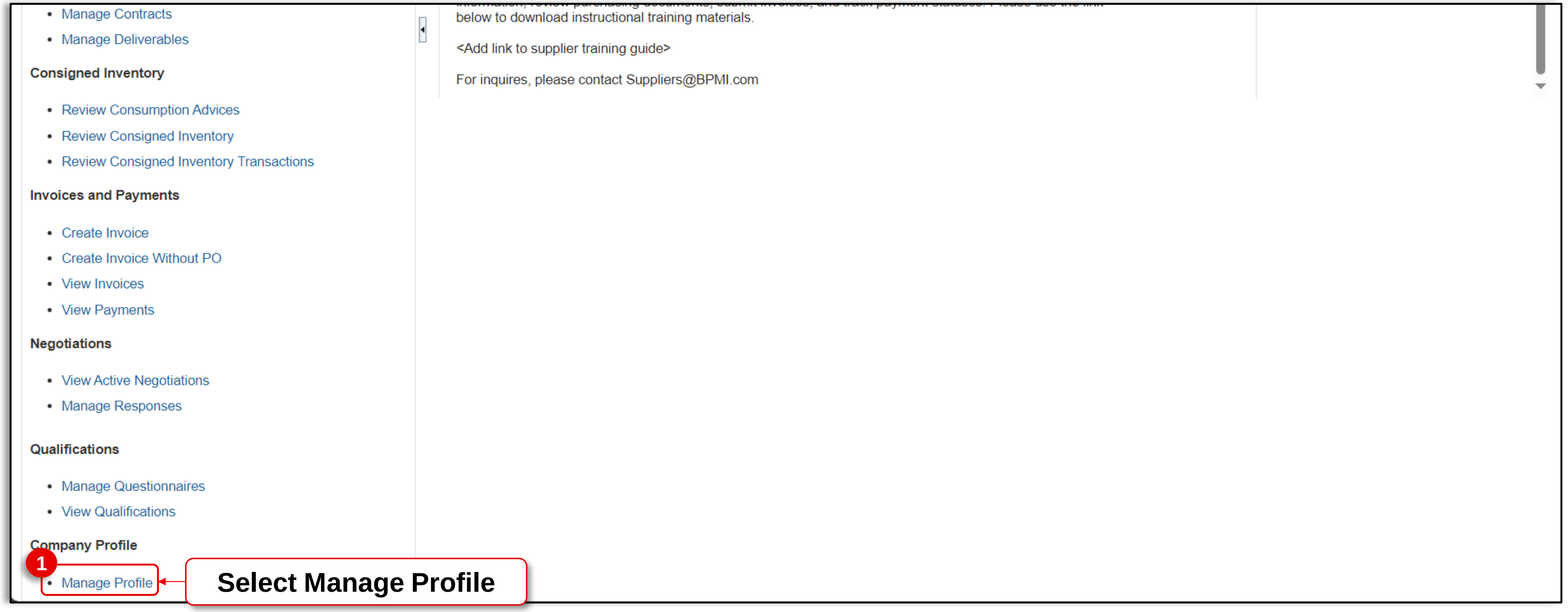
Supplier Portal – Manage Supplier Profile

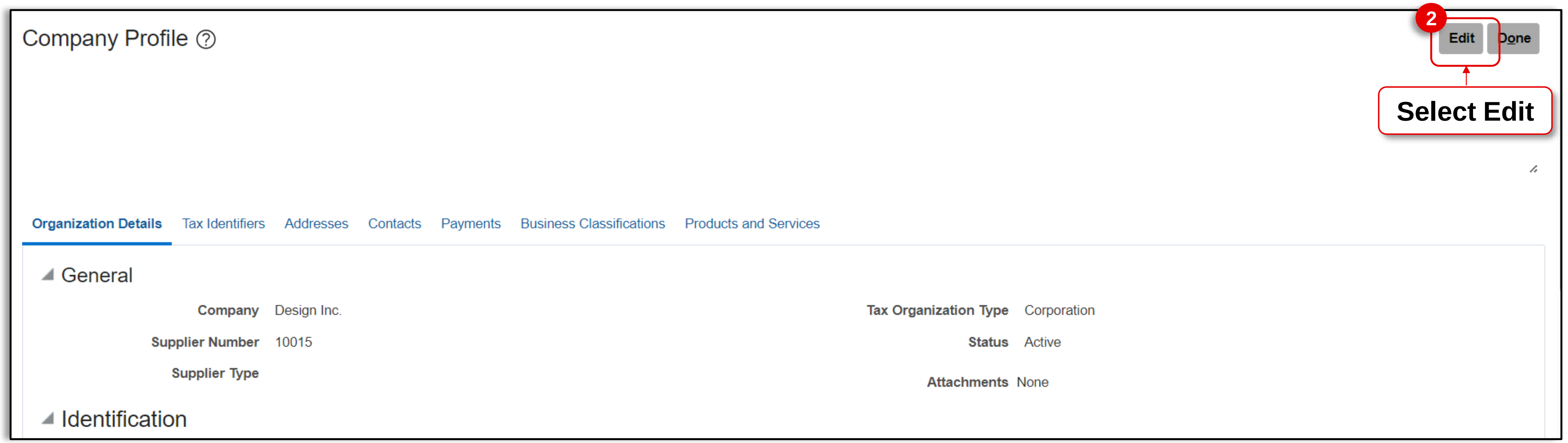
Review and update supplier profile information.

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.





Supplier Portal – Manage Supplier Profile

Review and update supplier profile information.

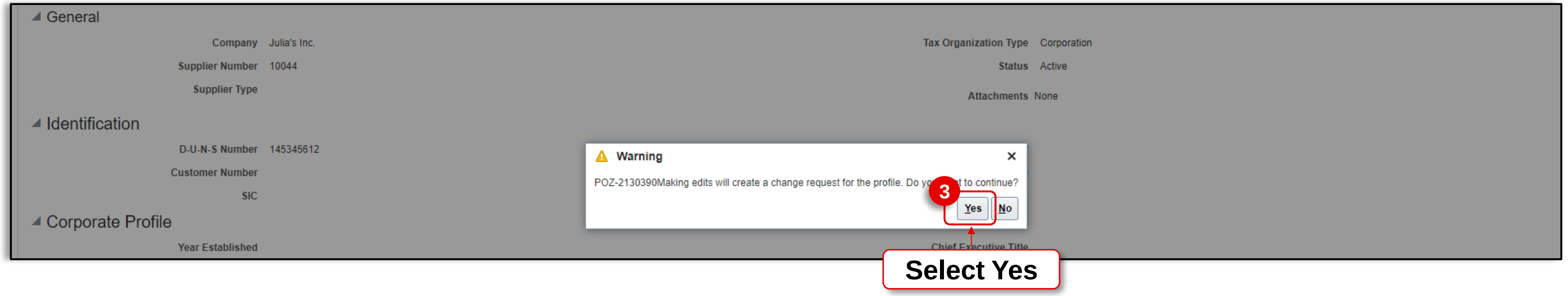
3. A warning message will show. Select **Yes** to continue.

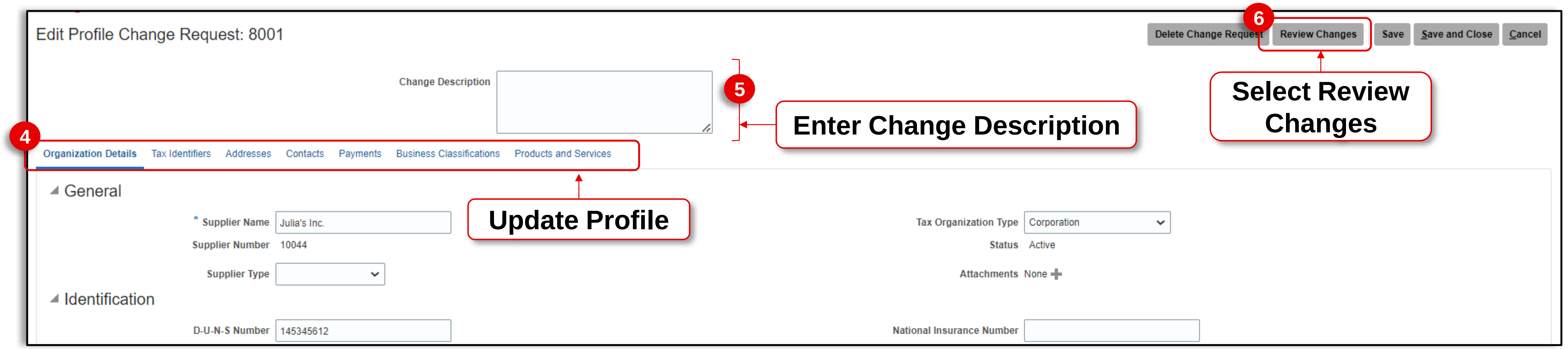
4. Update the supplier record. Navigate through the profile information using the tabs located at the top of the page:
   - **Organization Details**
   - **Tax Identifiers**
   - **Addresses**
   - **Contacts**
   - **Payments**
   - **Business Classifications**
   - **Products & Services**

> ***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**.**





Supplier Portal – Manage Supplier Profile

Review and update supplier profile information.

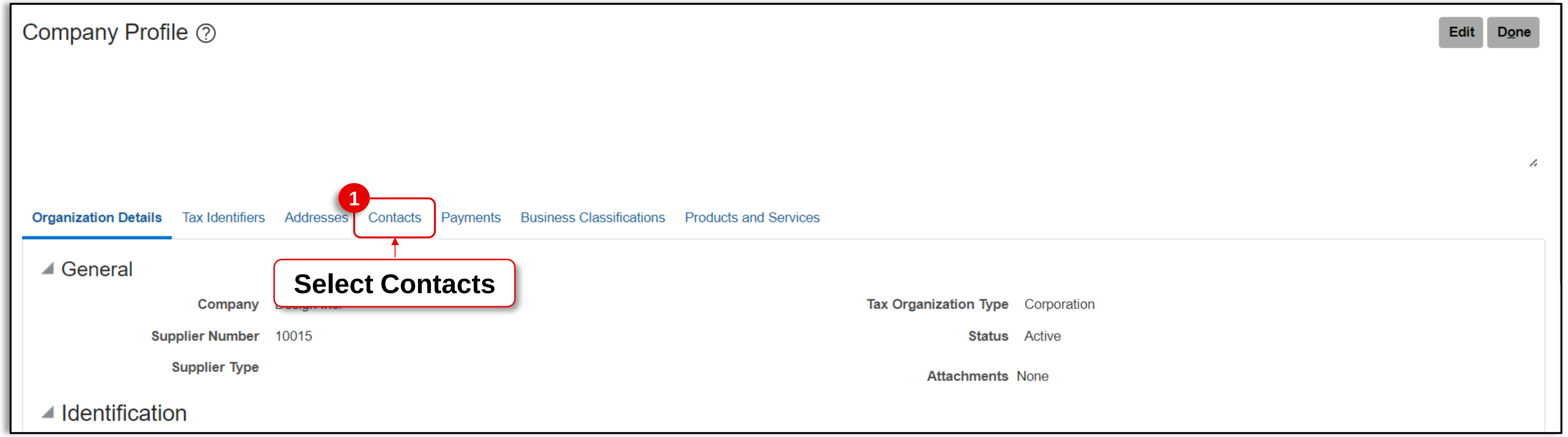
7. Select **Edit** to continue making updates. Select **Submit** when done. A confirmation note will show. The profile change request is routed to BPMI for review and approval.

MANAGE SUPPLIER PROFILE – MANAGE CONTACTS

Supplier Portal – Manage Supplier Contacts

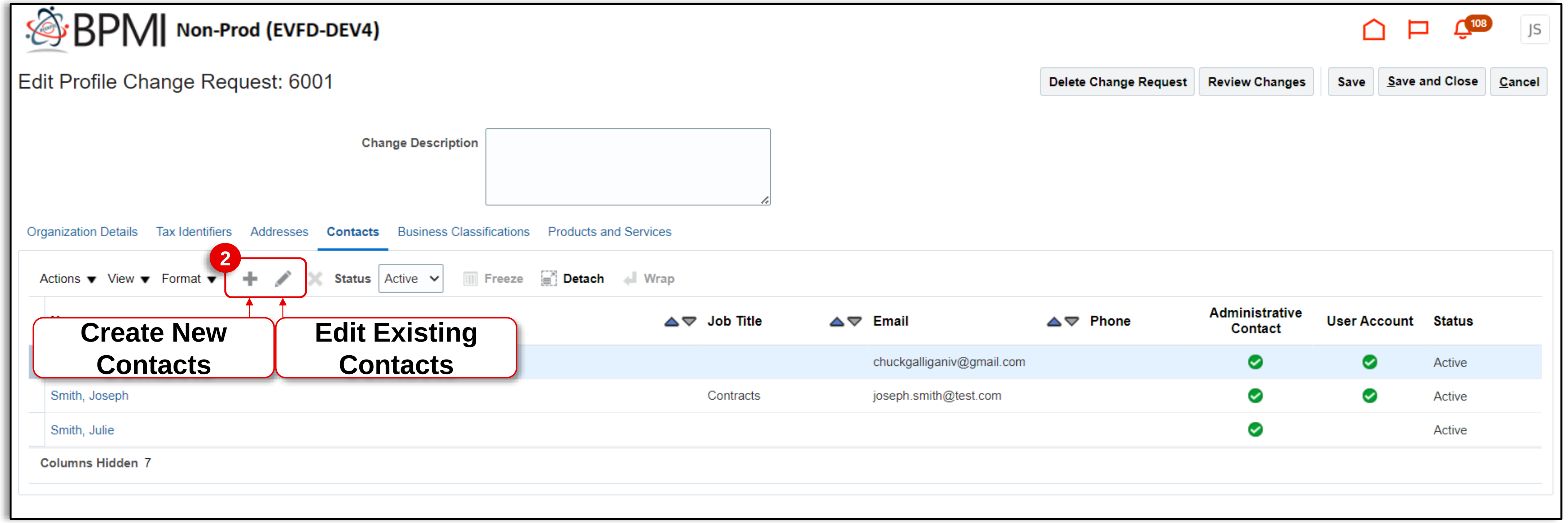
Review and update supplier profile information.

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.



Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

Edit an Existing Contact

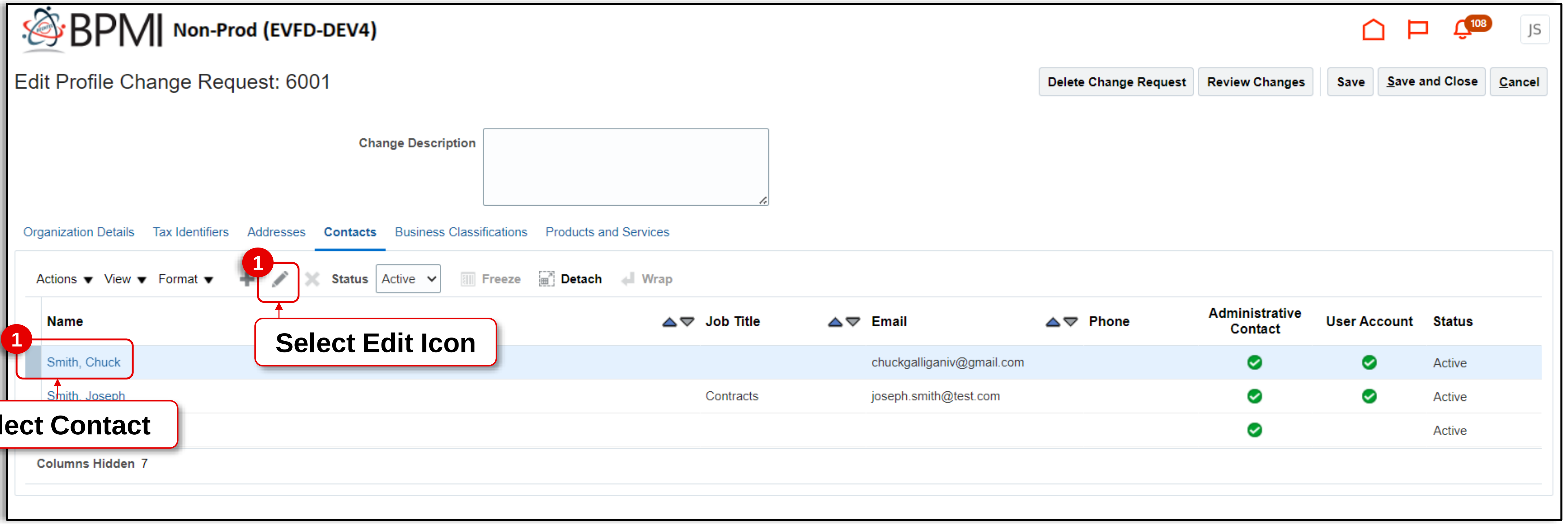
1. To edit an existing contact, choose the appropriate contact and select the **Edit** icon on the tool bar.

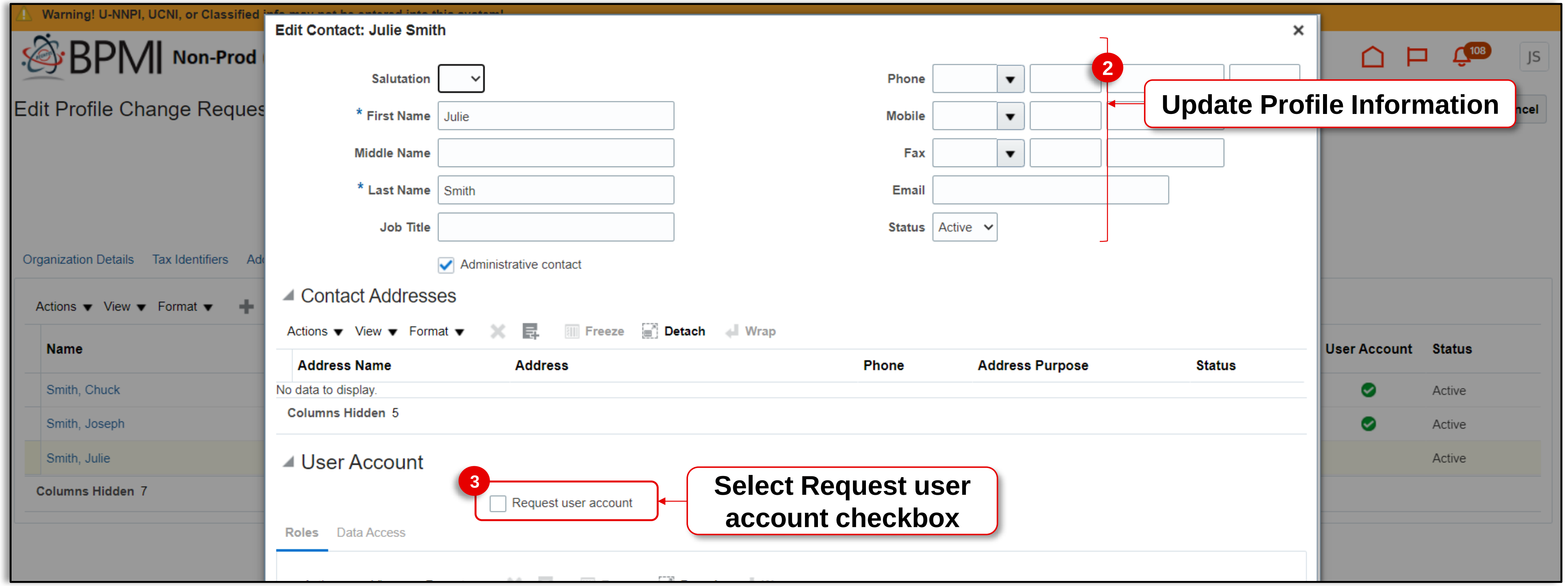
2. On the Edit Contact screen, update the information as required, including email, phone number, etc.

> ***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.





Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

Edit an Existing Contact

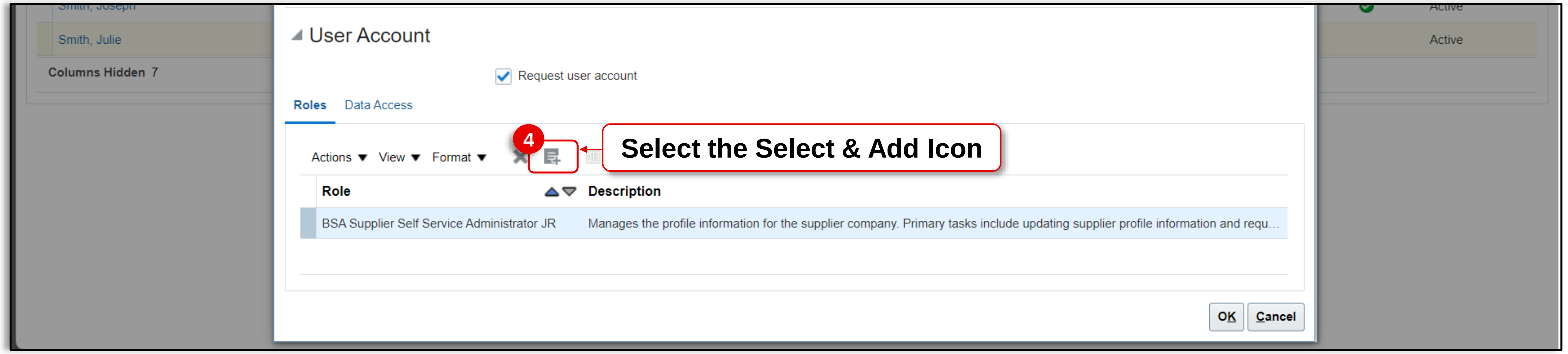
4. Under the Roles section, the default role assigned to Portal users display. Assign the contact additional roles by selecting the **Select and Add** icon.

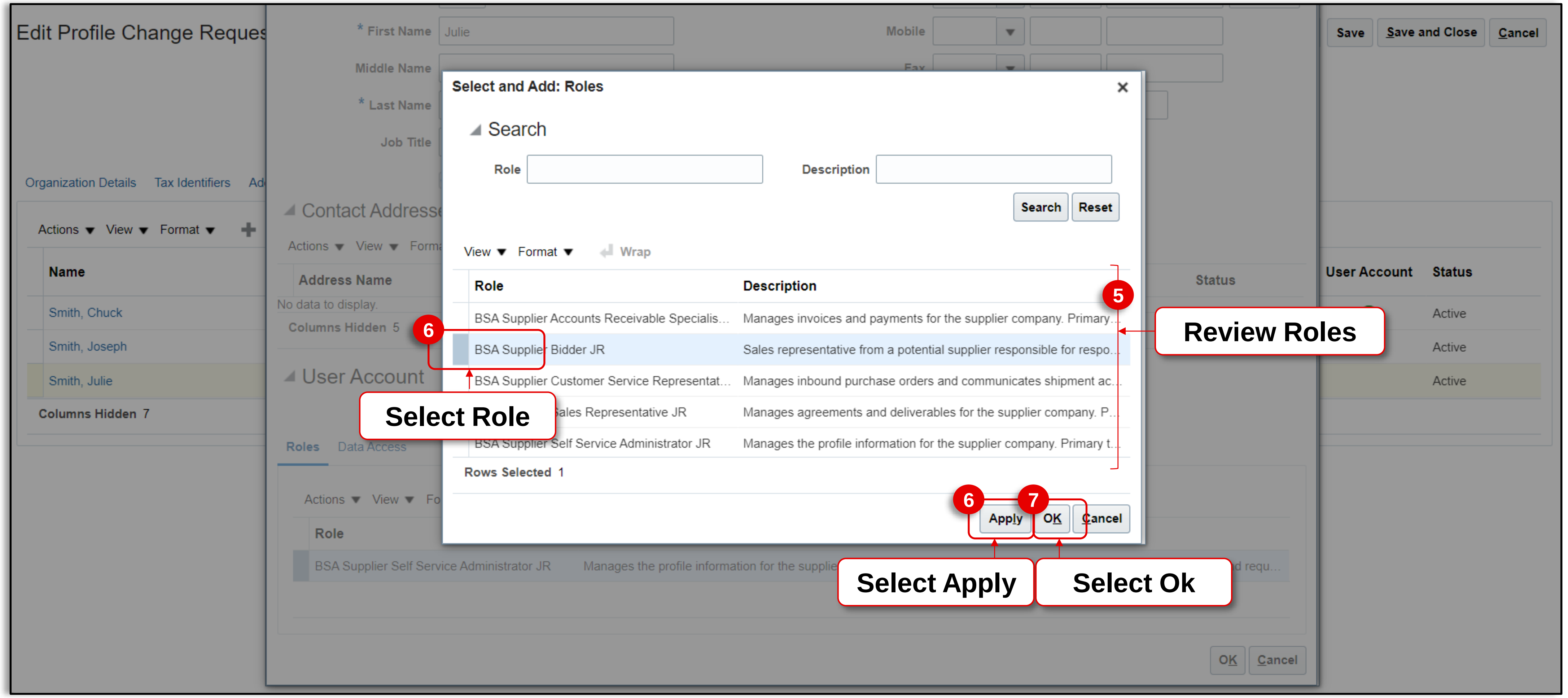
5. The list of roles available to a supplier contact display. Read the description of each role.

> ***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**.



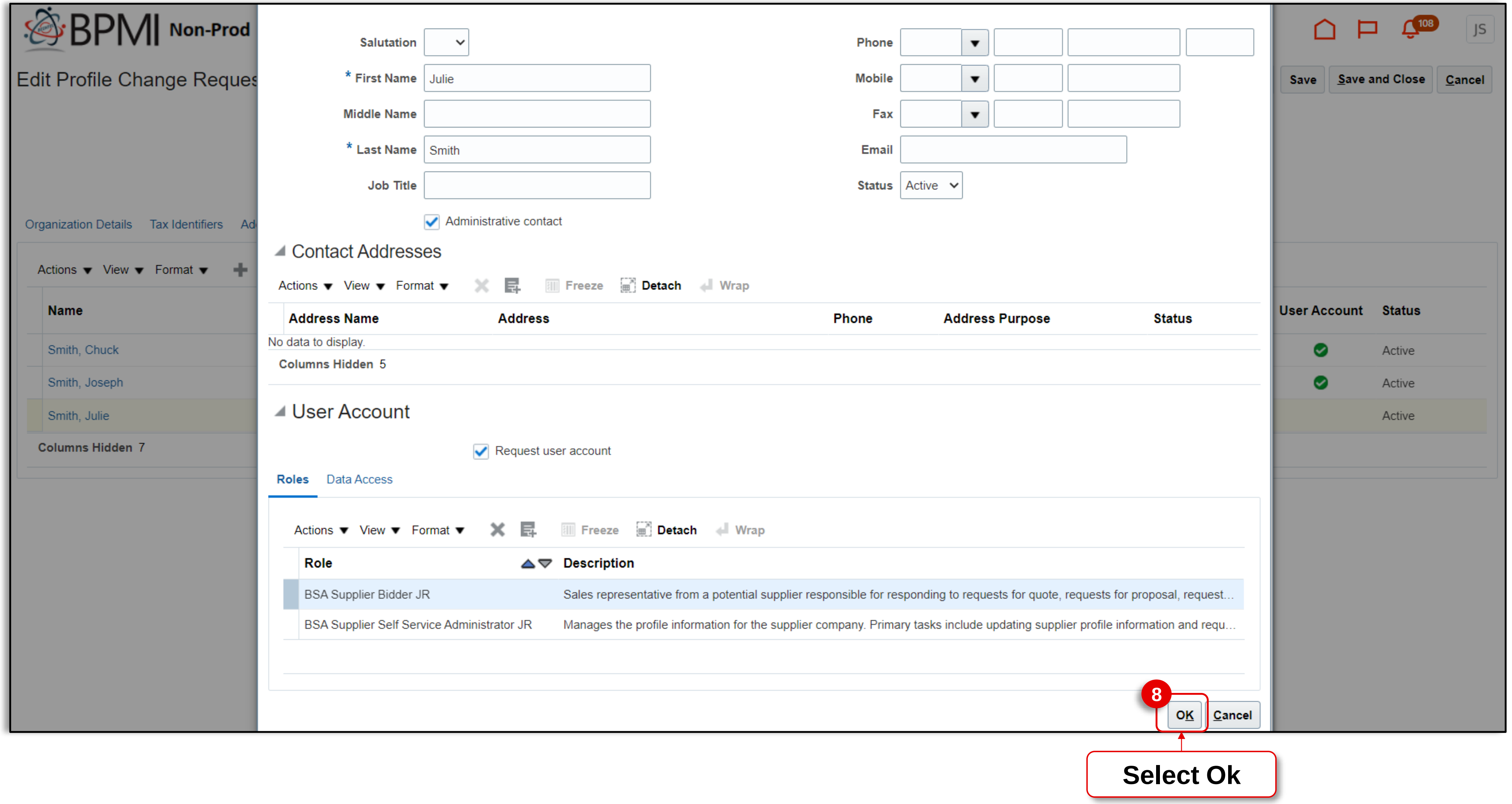


Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

Edit an Existing Contact

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



Supplier Portal – Manage Supplier Contacts

Review and update supplier profile information.

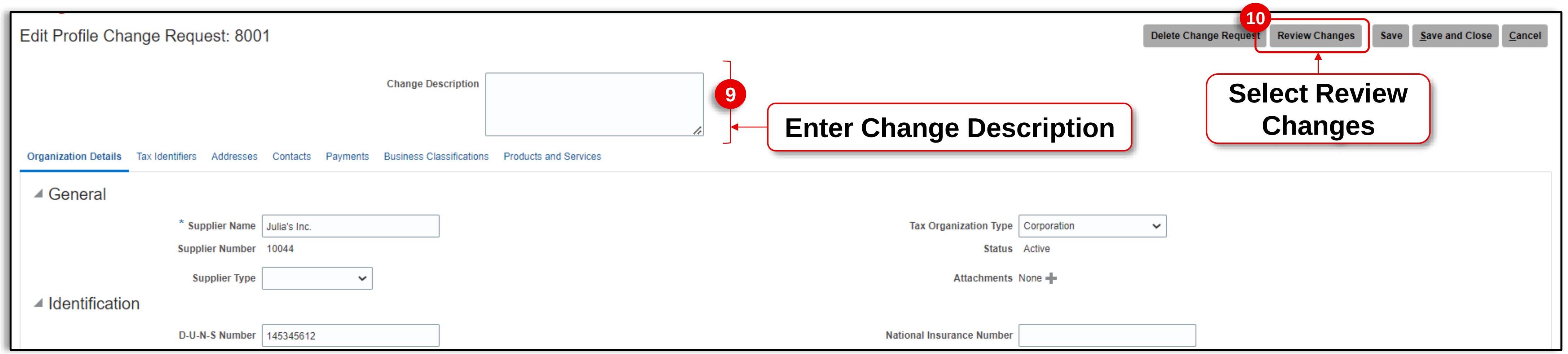
Edit an Existing Contact

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.



NEGOTIATIONS WORK AREA

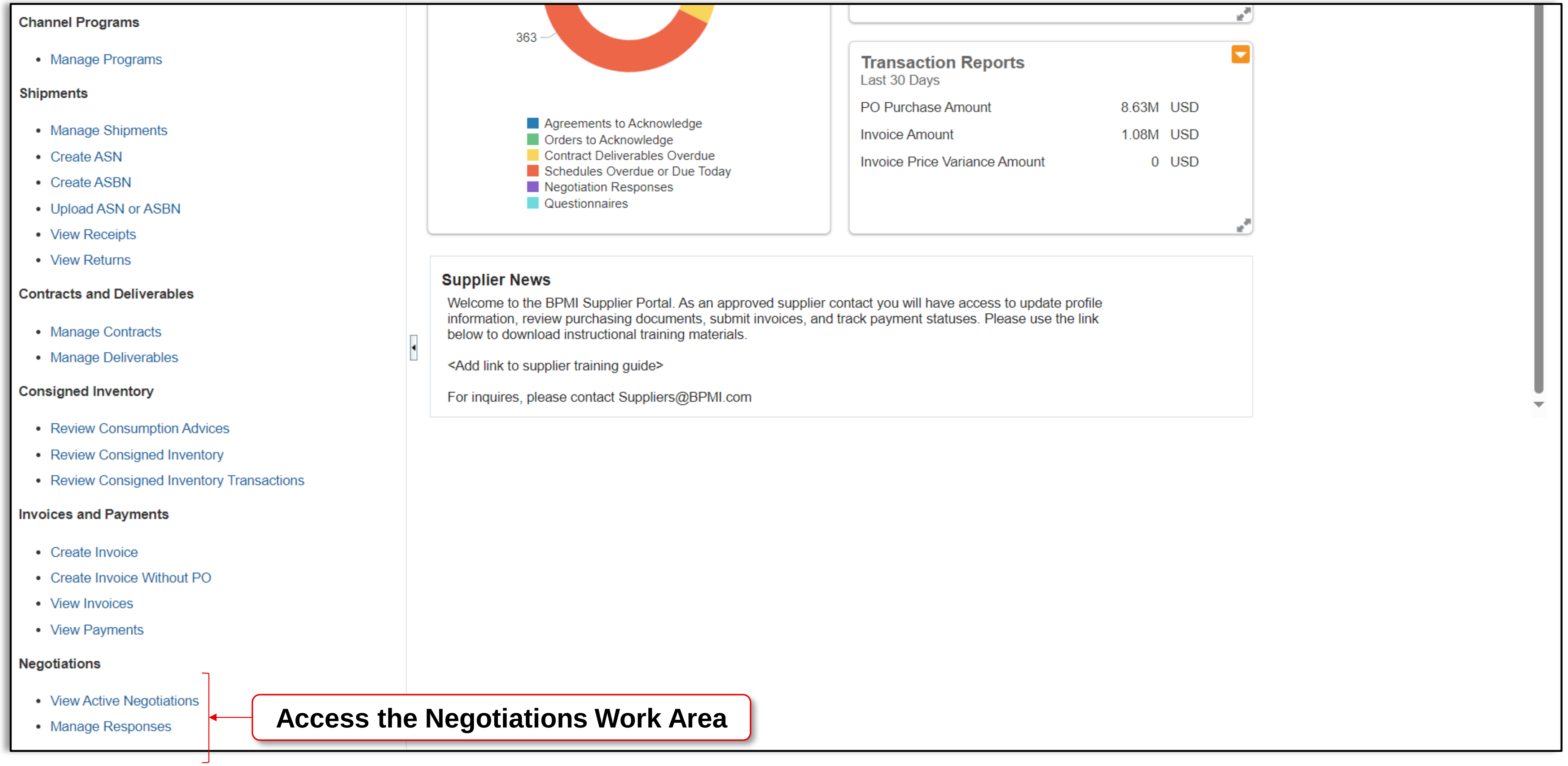
Supplier Portal – Negotiations Work Area

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.



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.

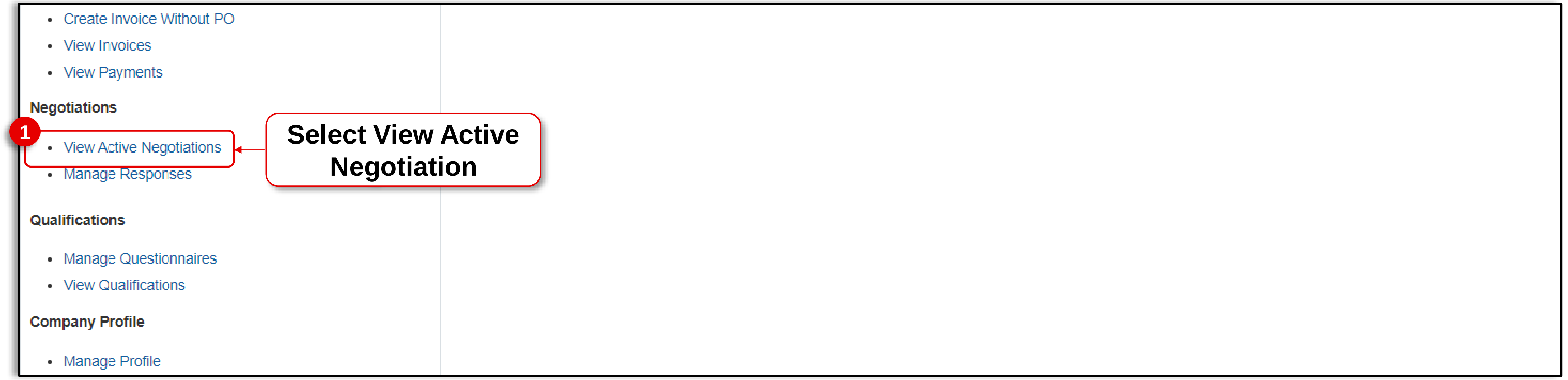
1. Select the **View Active Negotiations** link on the Supplier Portal home page.

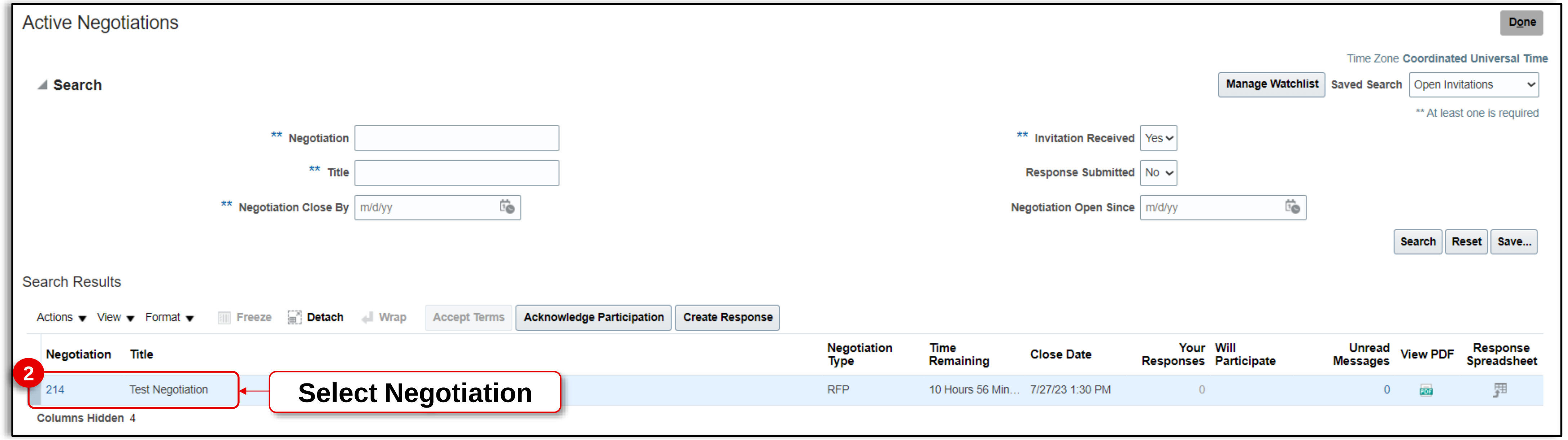
> ***Note:*** *A Supplier may also access RFPs requiring acknowledgement using the* ***Notification Bell*** *and the* ***Requiring Attention*** *Infolet on the Supplier Portal home page.*

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.*





BPMI | ORACLE

Supplier Portal – Acknowledge Participation

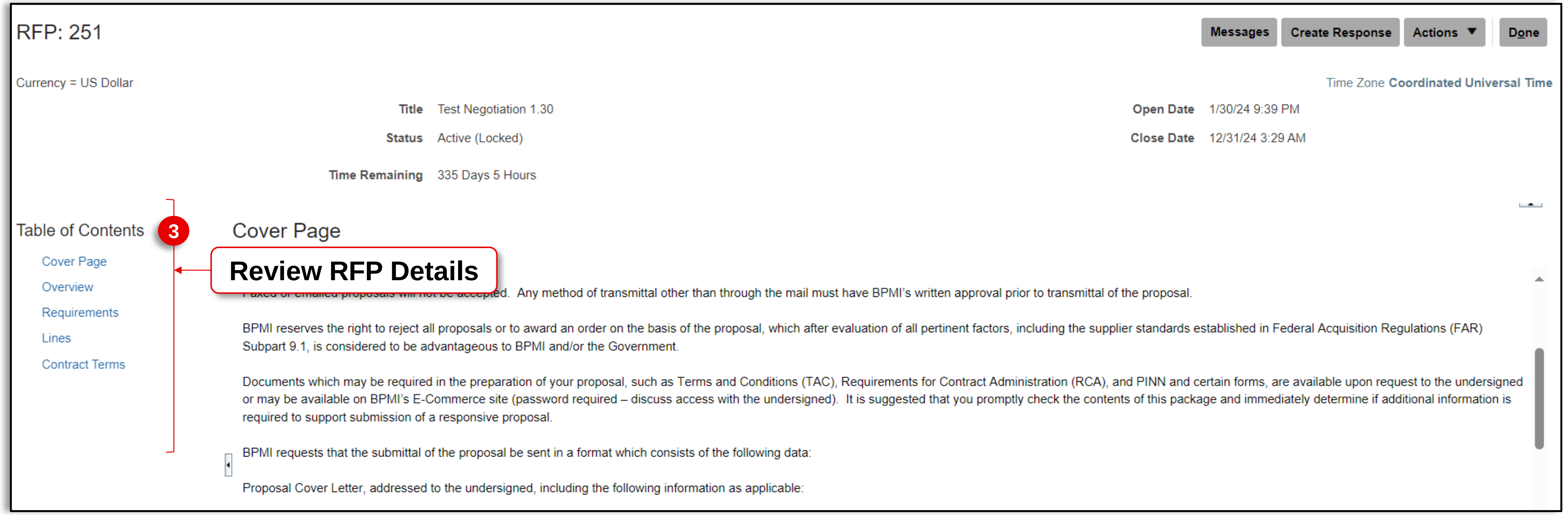
Accept or decline an invitation to participate in an RFP with BPMI.

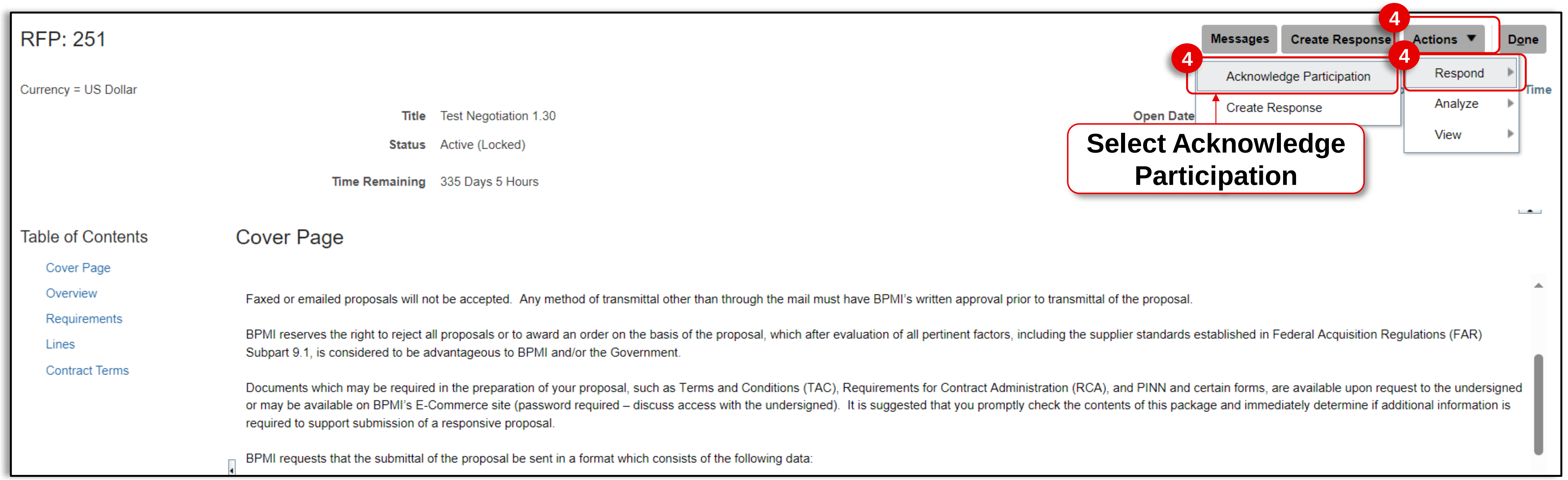
View/Acknowledge Negotiation

3. 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**.*

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





Supplier Portal – Acknowledge Participation

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

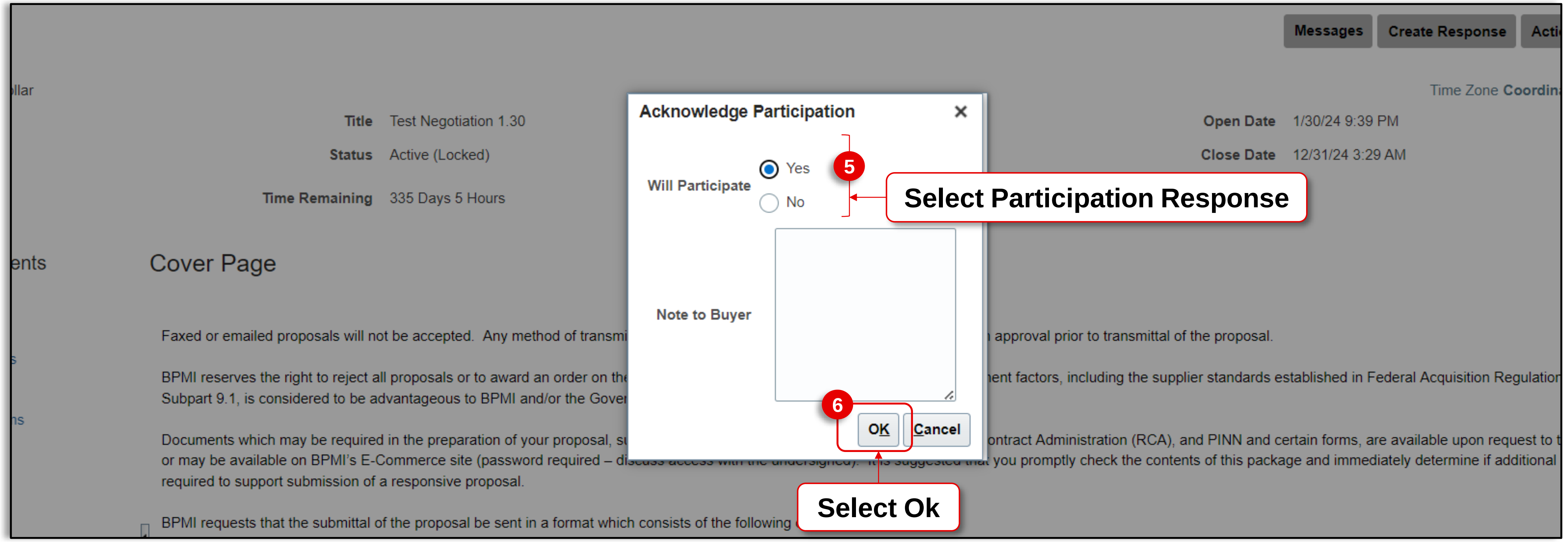
View/Acknowledge Negotiation

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.*



NEGOTIATIONS – CREATE PROPOSAL

Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

Create Proposal – General

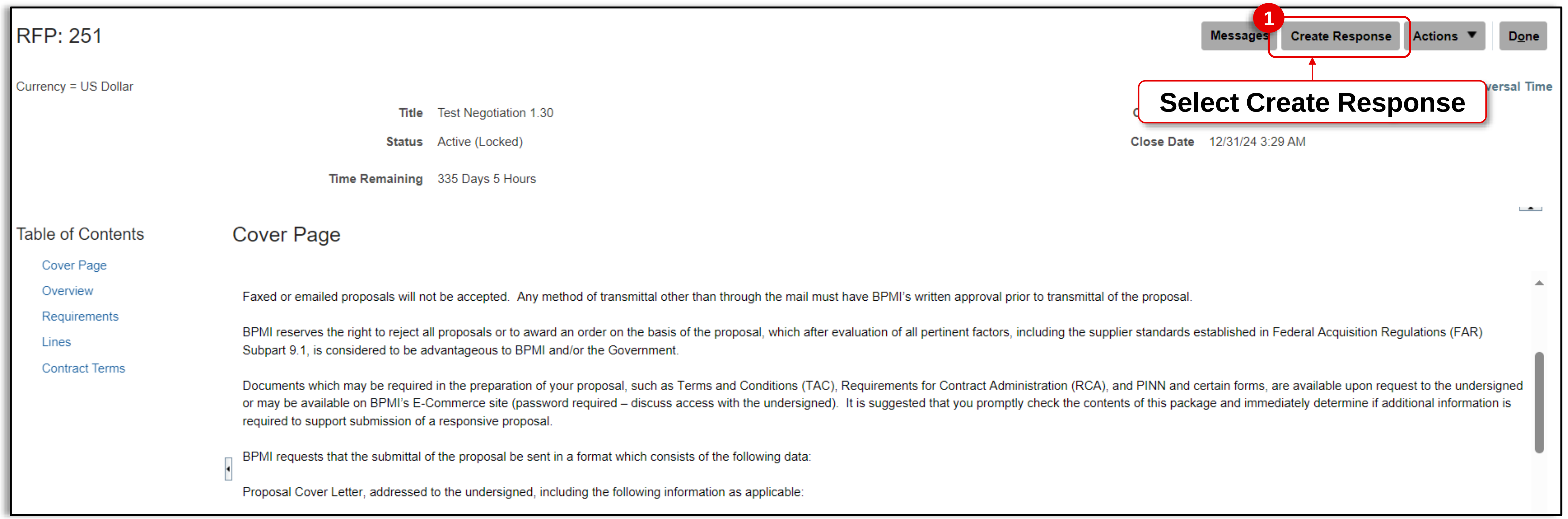
1. Once a supplier has Acknowledged Participation, select the **Create Response** button on the RFP page to begin drafting the response.

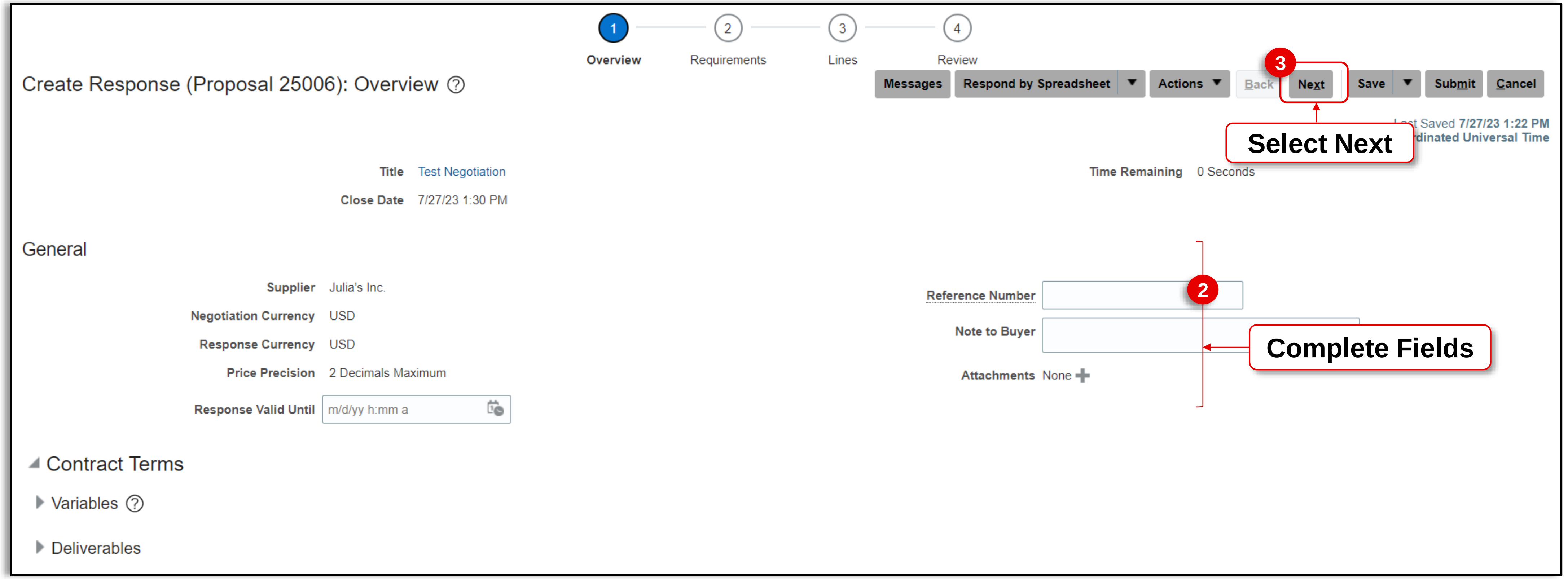
> ***Note:*** *Reference the Cover Page for the BPMI requested validity date, as applicable.*

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.*





Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

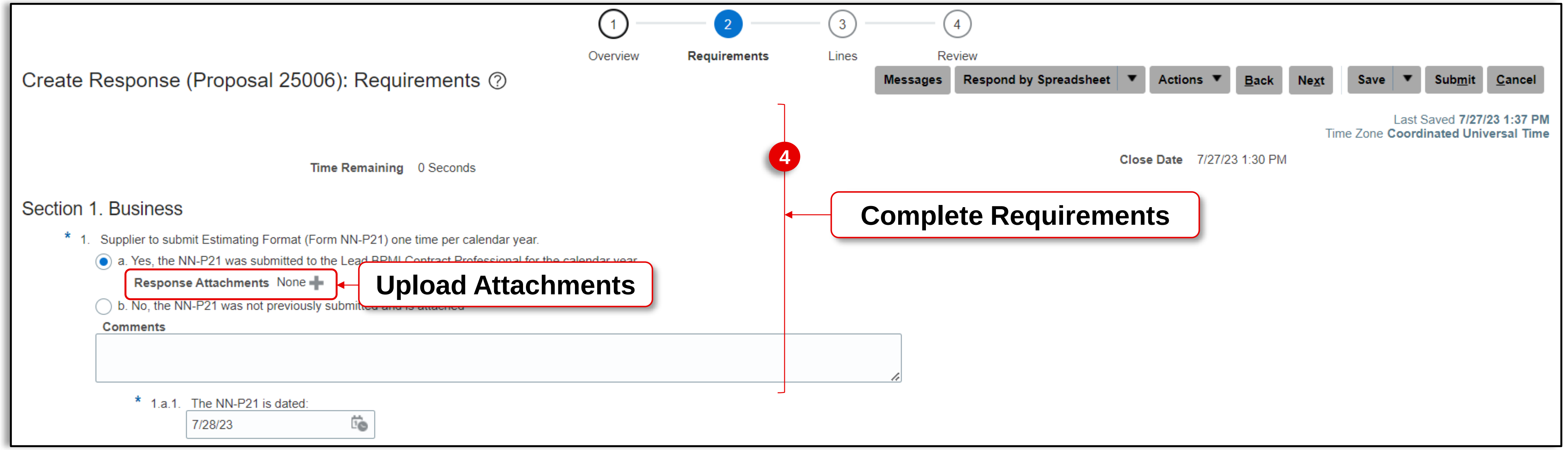
Create Proposal – Requirements

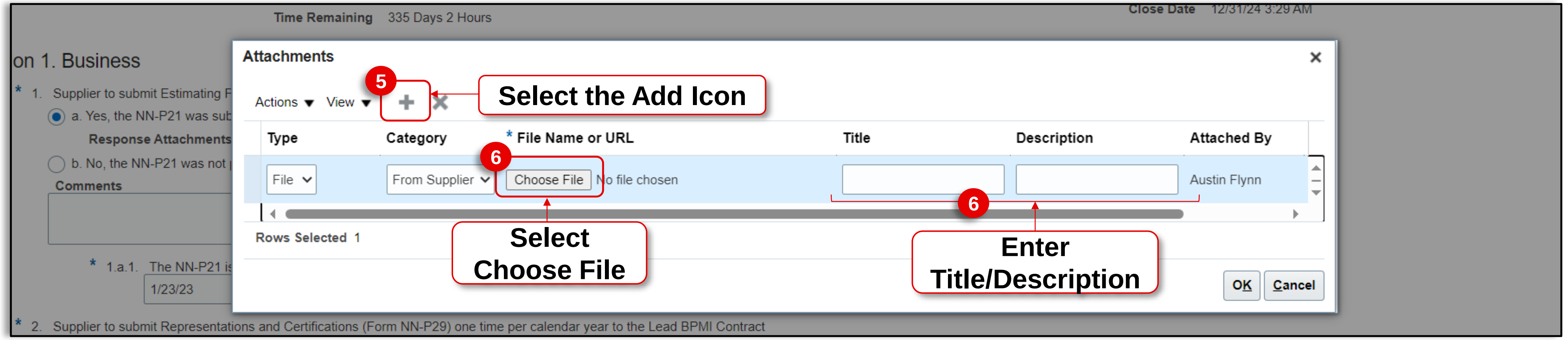
4. On the Requirements page, answer the negotiation questions. Read through each question carefully and provide a response.

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

5. The Attachments screen displays, select the **Add** icon.

6. 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.

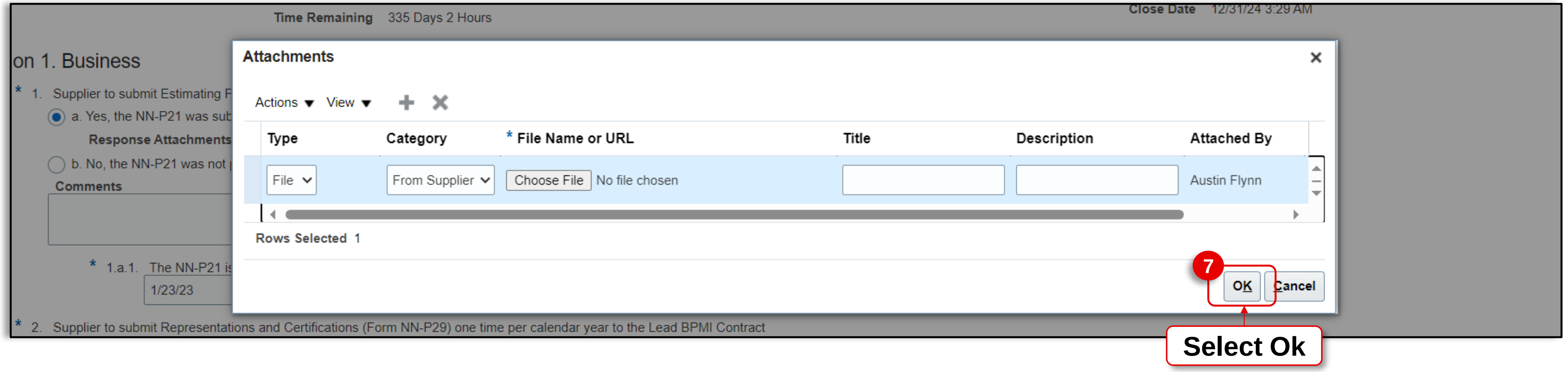
Create Proposal – Requirements

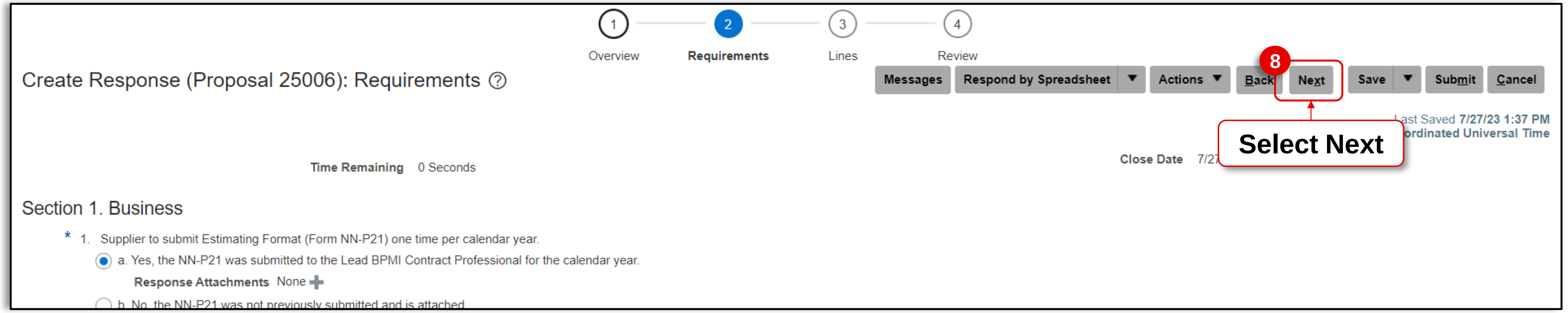
7. If multiple documents are required for the question, repeat steps 5 & 6. When finished, select **Ok**.

8. 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.*





Supplier Portal – Create Proposal

Create & submit a proposal to an RFP.

Create Proposal – Lines

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

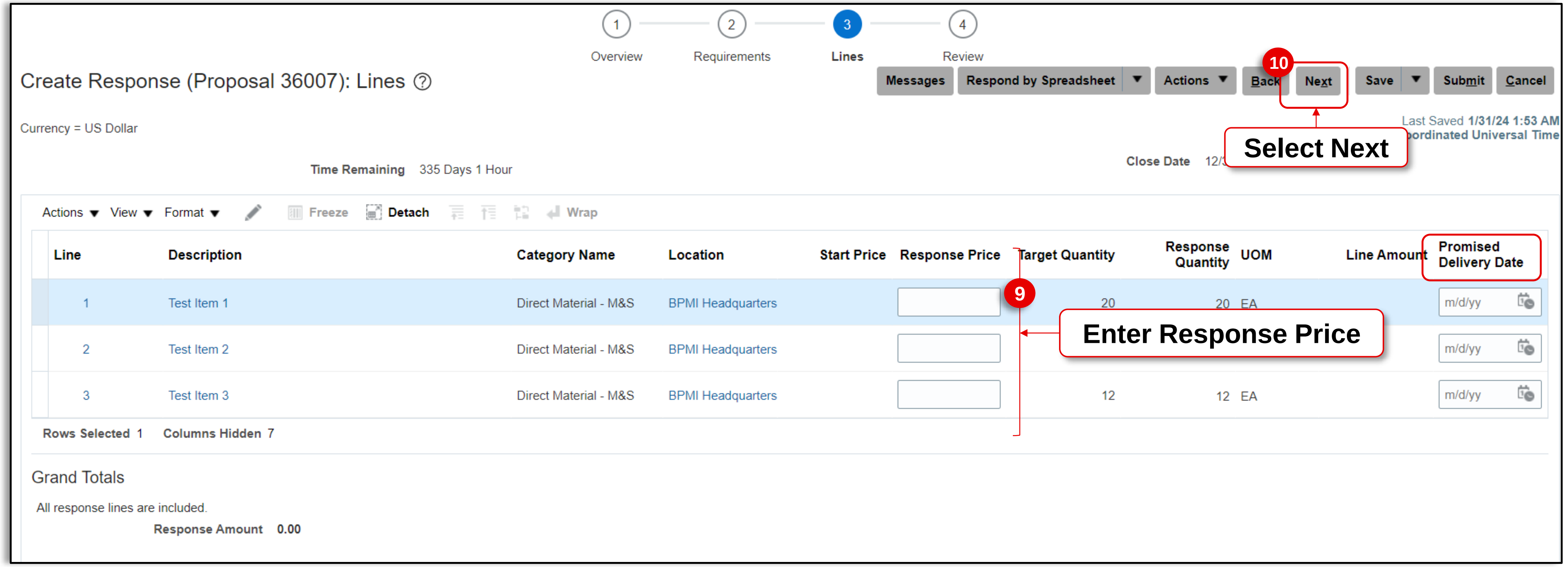
   A **Promise Delivery Date** (i.e., Contract Delivery Date) can be entered for each line item also, if applicable.

> ***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.*

10. Select **Next** when done.



Supplier Portal – Create Proposal

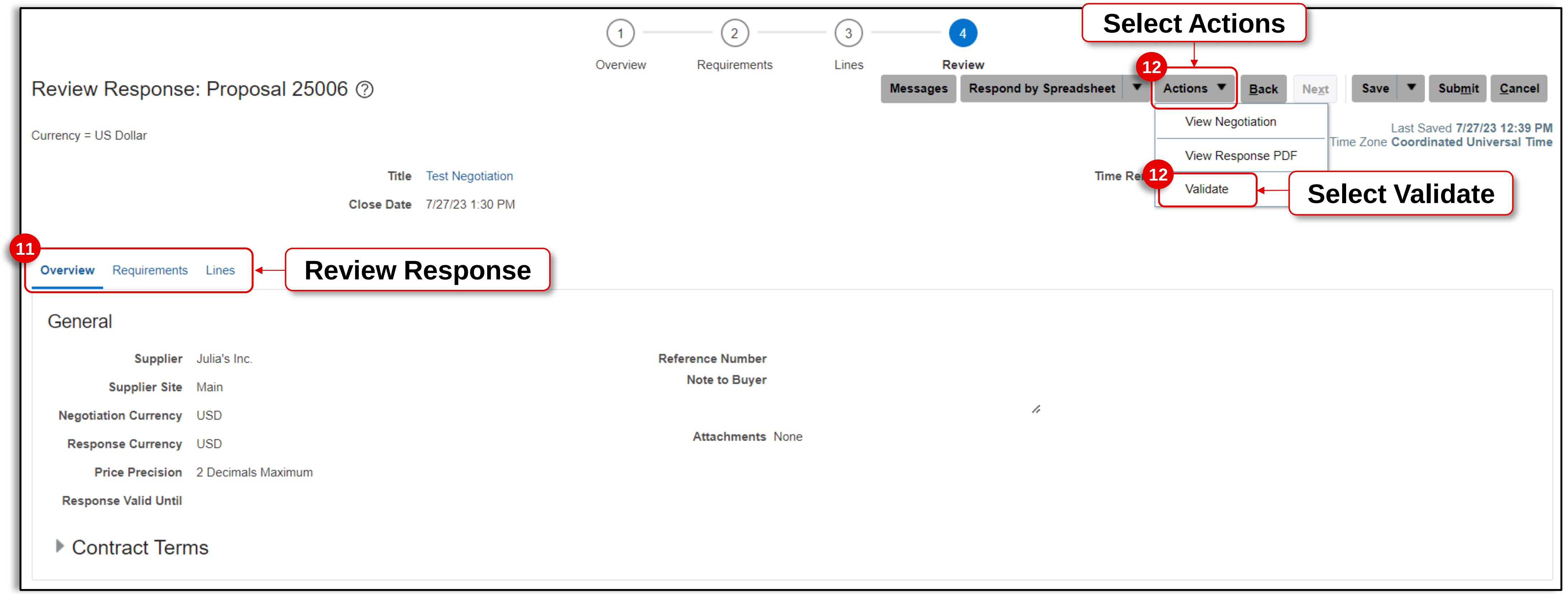
Create & submit a proposal to an RFP.

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.



Supplier Portal – Create Proposal

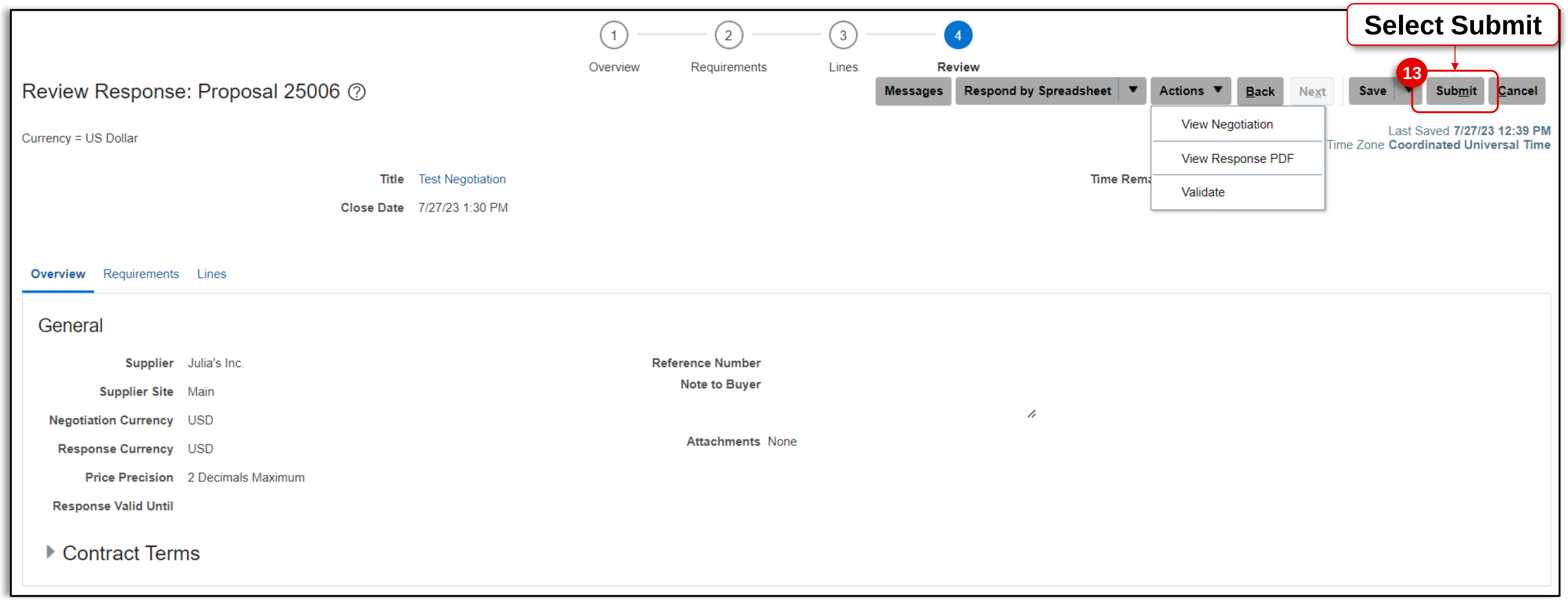
Create & submit a proposal to an RFP.

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 of responding. Participating suppliers are notified of the new round and are able to submit a new response to the RFP.*



NEGOTIATIONS – CREATE PROPOSAL VIA SPREADSHEET

Supplier Portal – Create Proposal via Spreadsheet

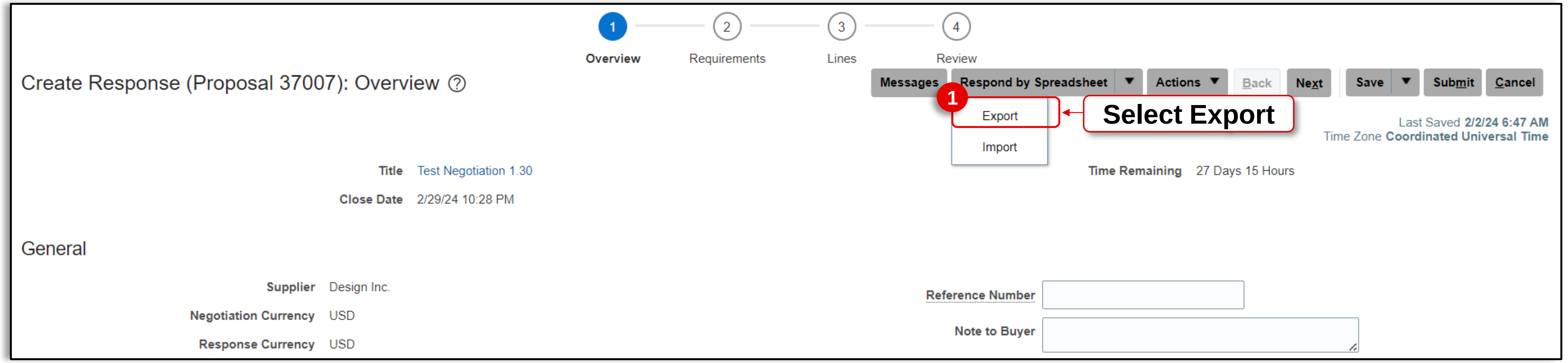
Create & submit a proposal to an RFP via spreadsheet.

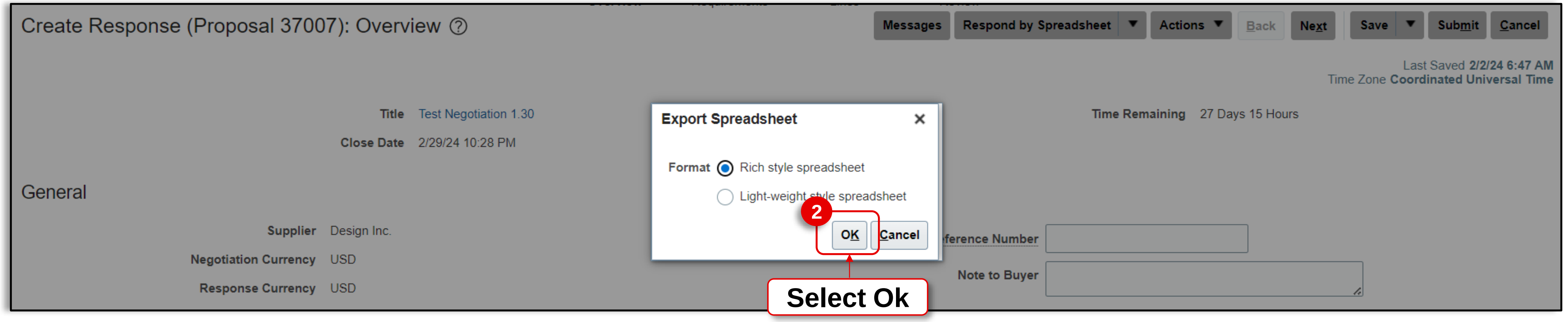
Create Proposal via Spreadsheet

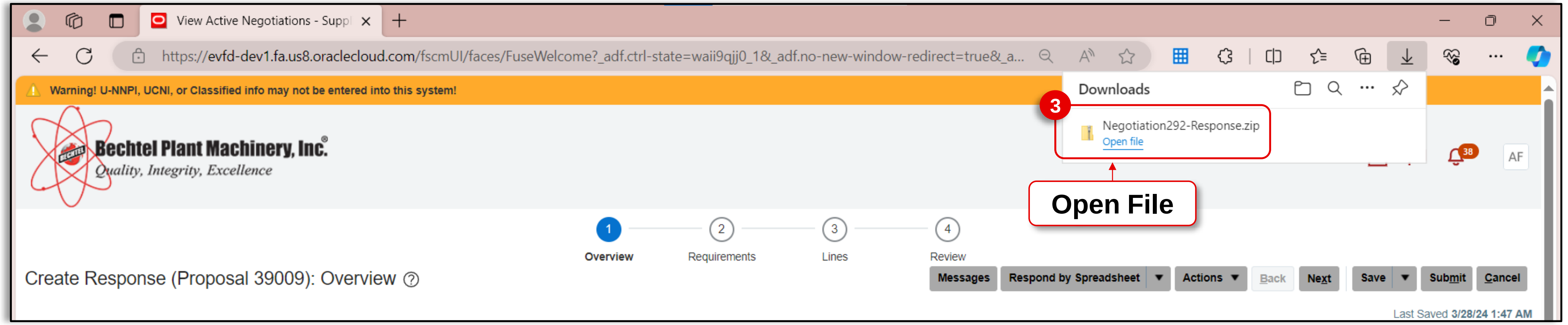
1. On The Create Response (Proposal) page, select the dropdown next to the **Respond by Spreadsheet** button and choose **Export**.

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

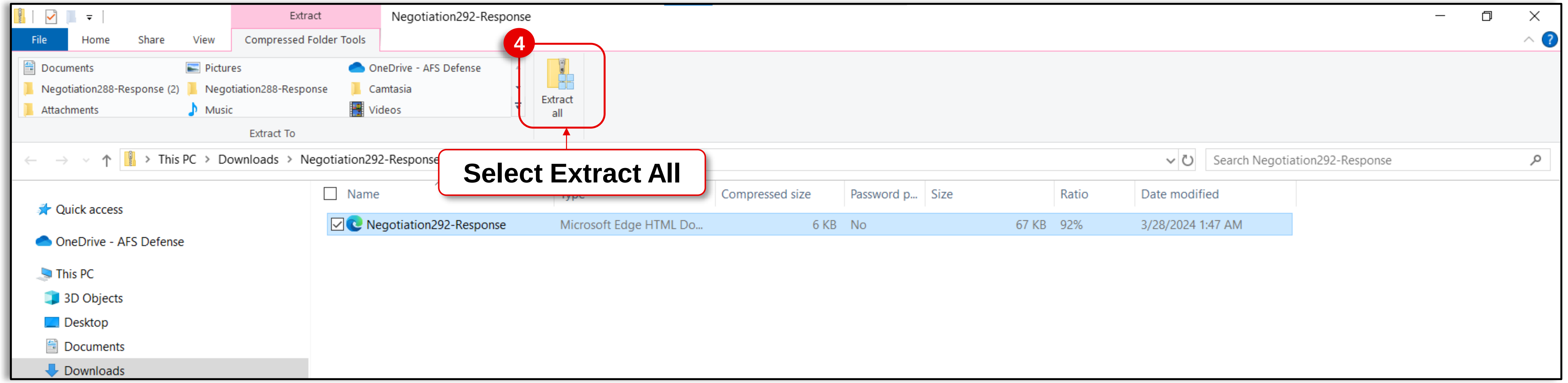
Create & submit a proposal to an RFP via spreadsheet.

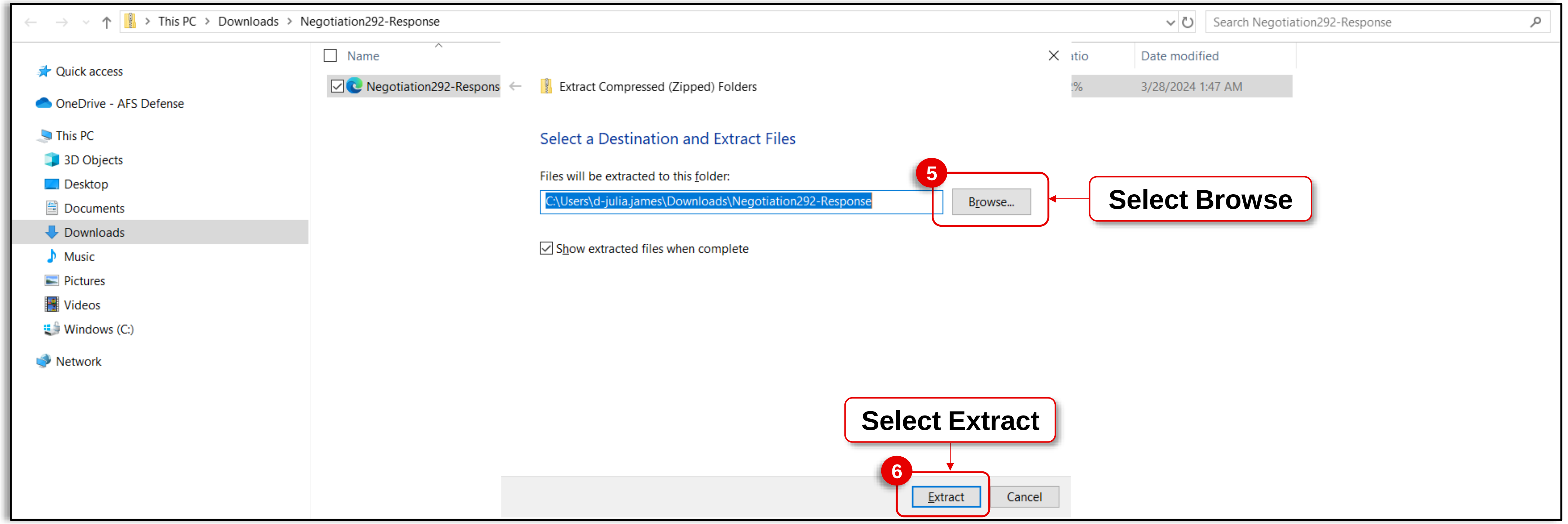
Create Proposal via Spreadsheet

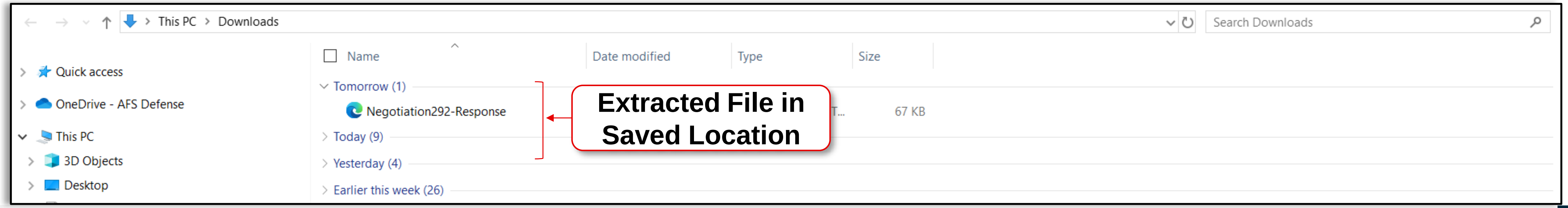
4. Prior to being able to open the file in excel, the file must be extracted. Select **Extract all**.

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

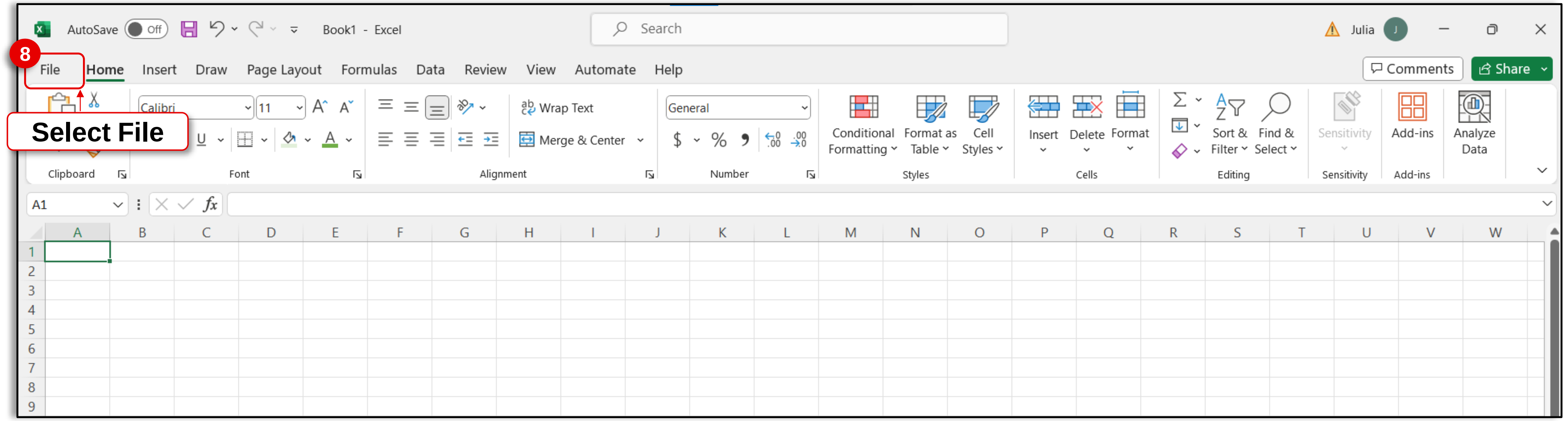
Create & submit a proposal to an RFP via spreadsheet.

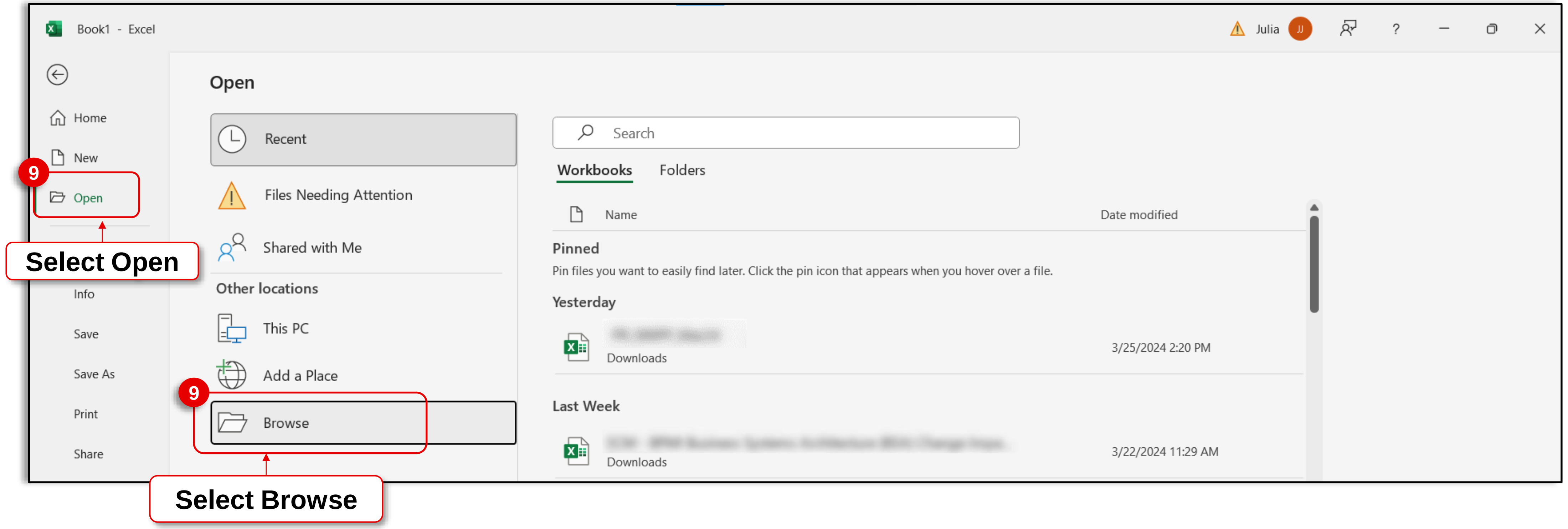
Create Proposal via Spreadsheet

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

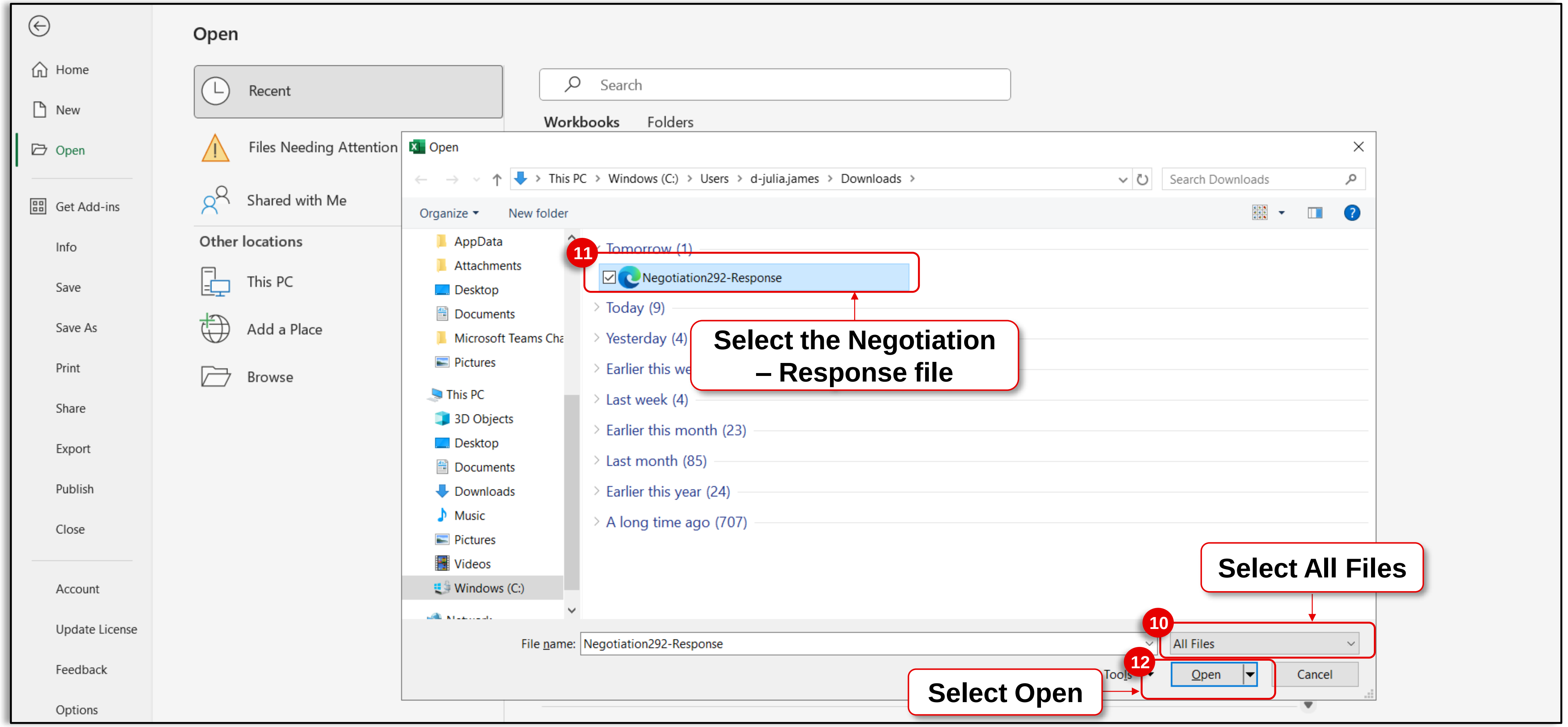
Create & submit a proposal to an RFP via spreadsheet.

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**.

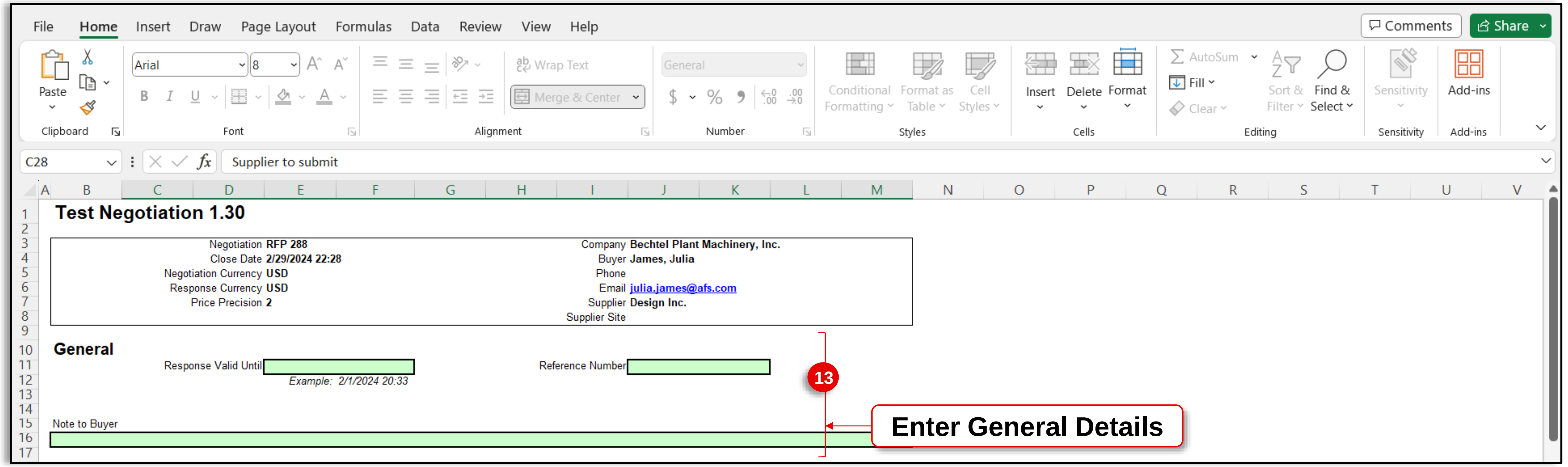


Supplier Portal – Create Proposal via Spreadsheet

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**



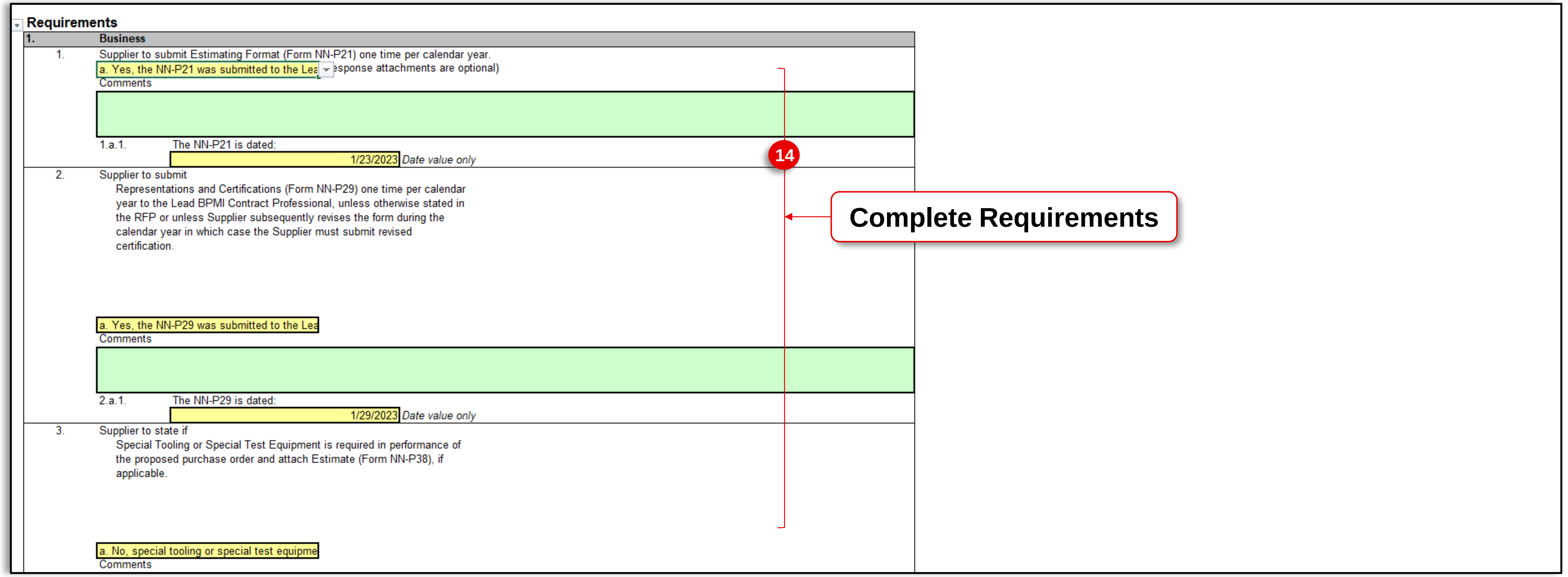
Supplier Portal – Create Proposal via Spreadsheet

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).



Supplier Portal – Create Proposal via Spreadsheet

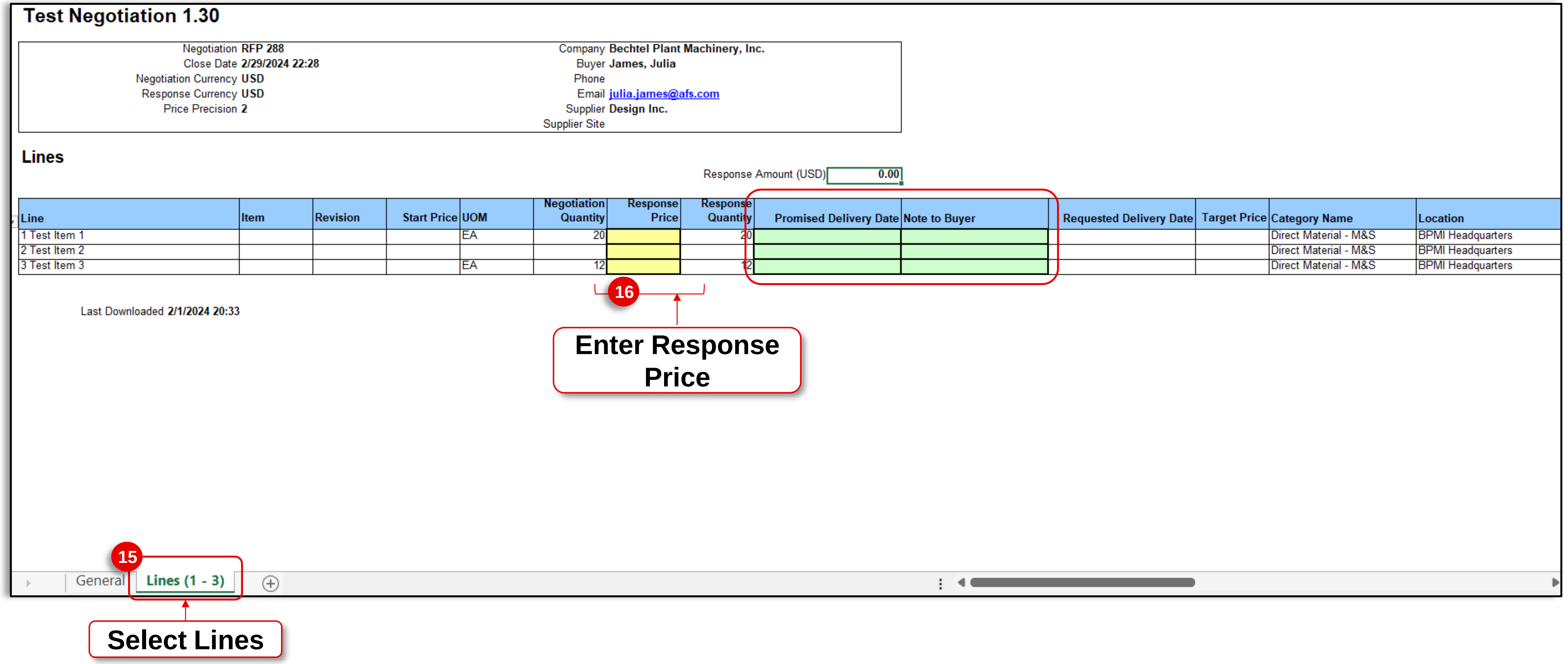
Create & submit a proposal to an RFP via spreadsheet.

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.



Supplier Portal – Create Proposal via Spreadsheet

Create & submit a proposal to an RFP via spreadsheet.

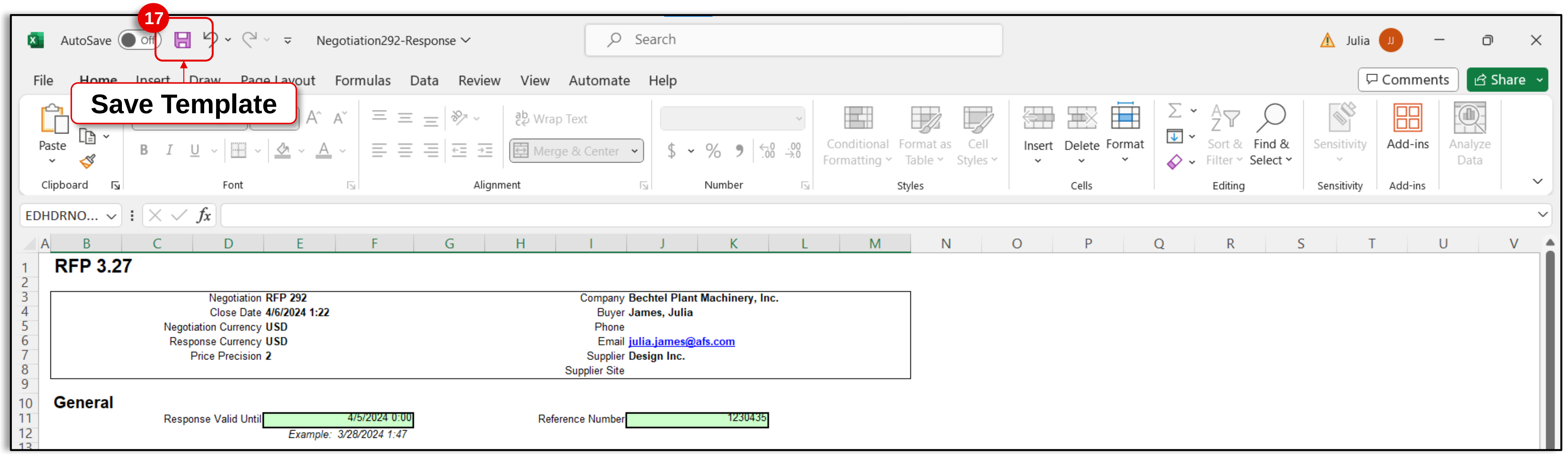
Create Proposal via Spreadsheet – Import

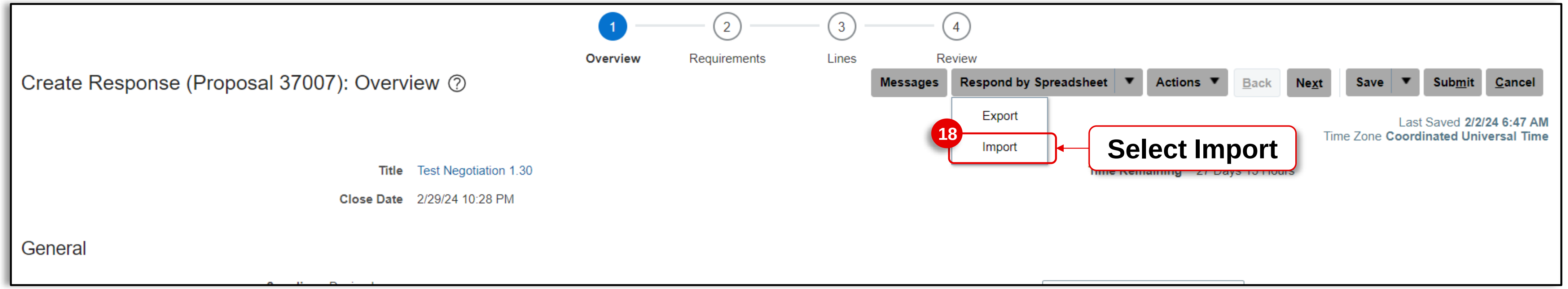
17. After the template is complete, be sure to save the file to ensure the most updated version is being imported into the Supplier Portal.

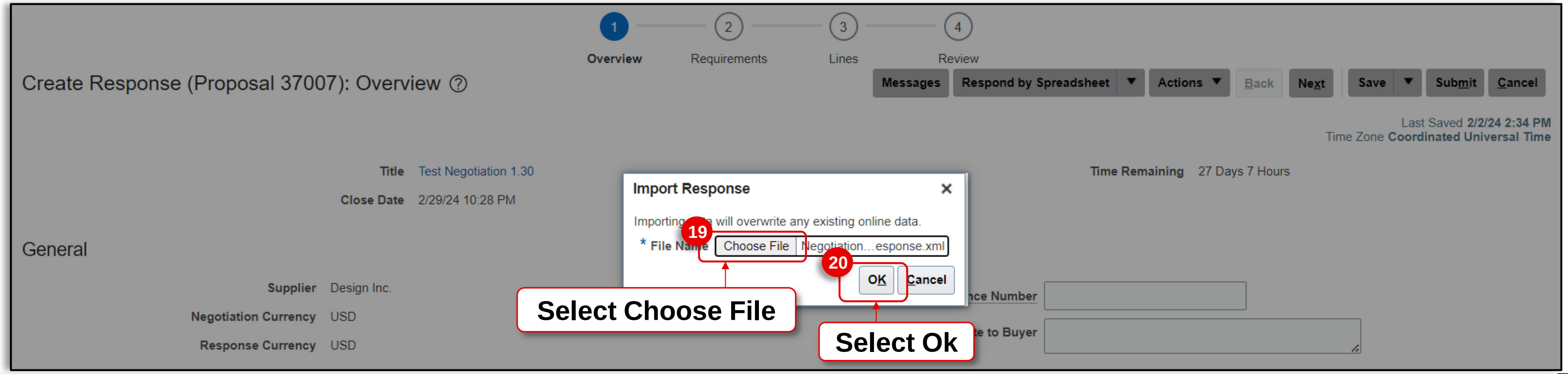
18. To import the file, return to the Supplier Portal and select **Import** on the Create Response page.

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.







NEGOTIATIONS – MANAGE RESPONSES

Supplier Portal – Manage Responses

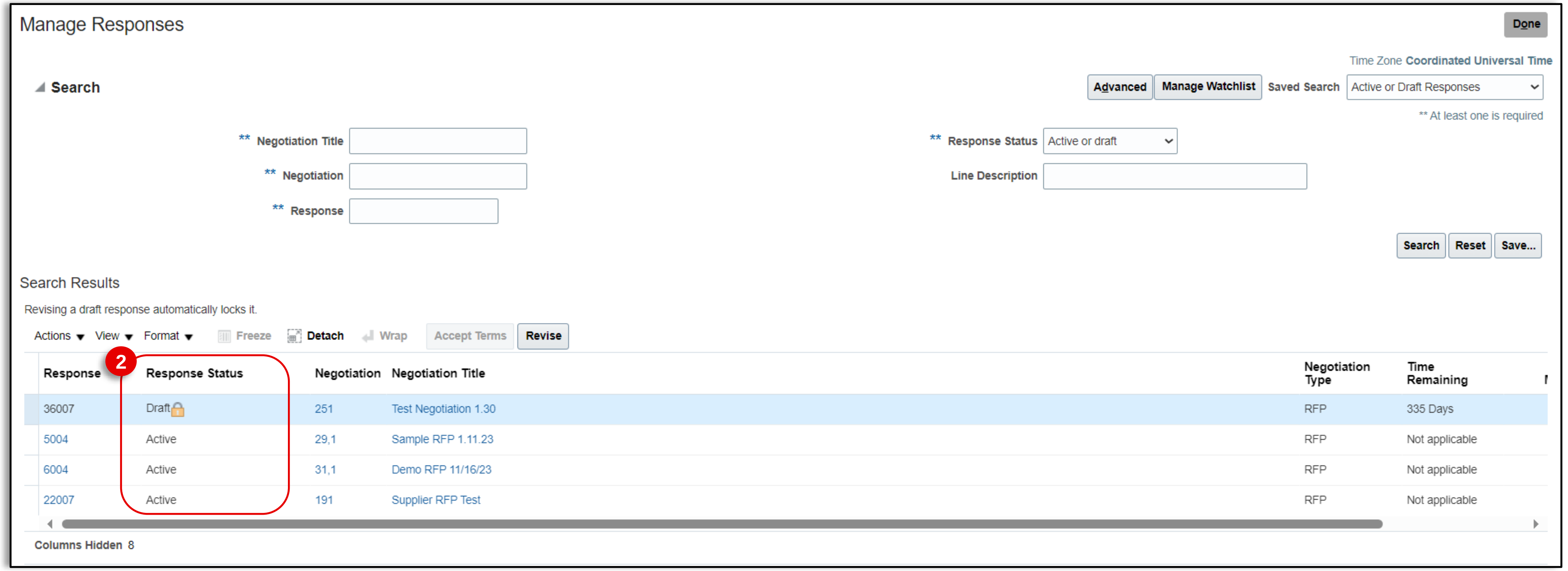
View and manage proposals.

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



Supplier Portal – Manage Responses

View and manage proposals.

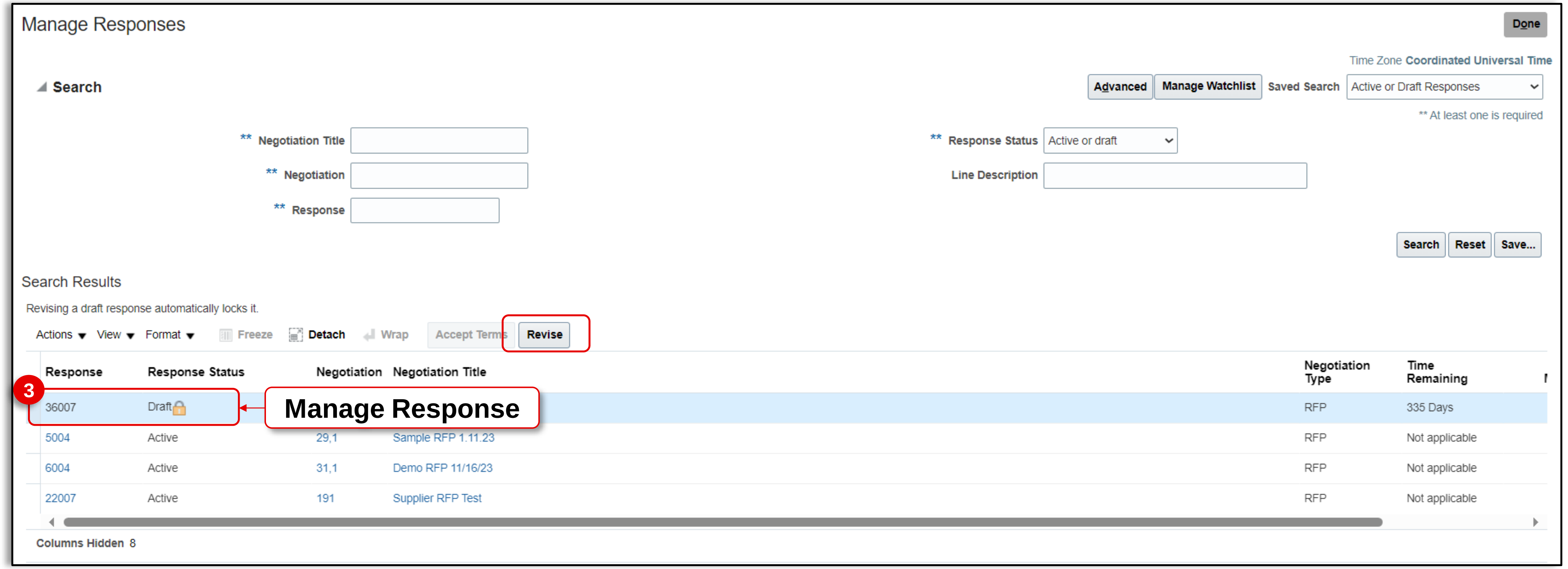
Manage Responses

- **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.



PURCHASE ORDERS WORK AREA

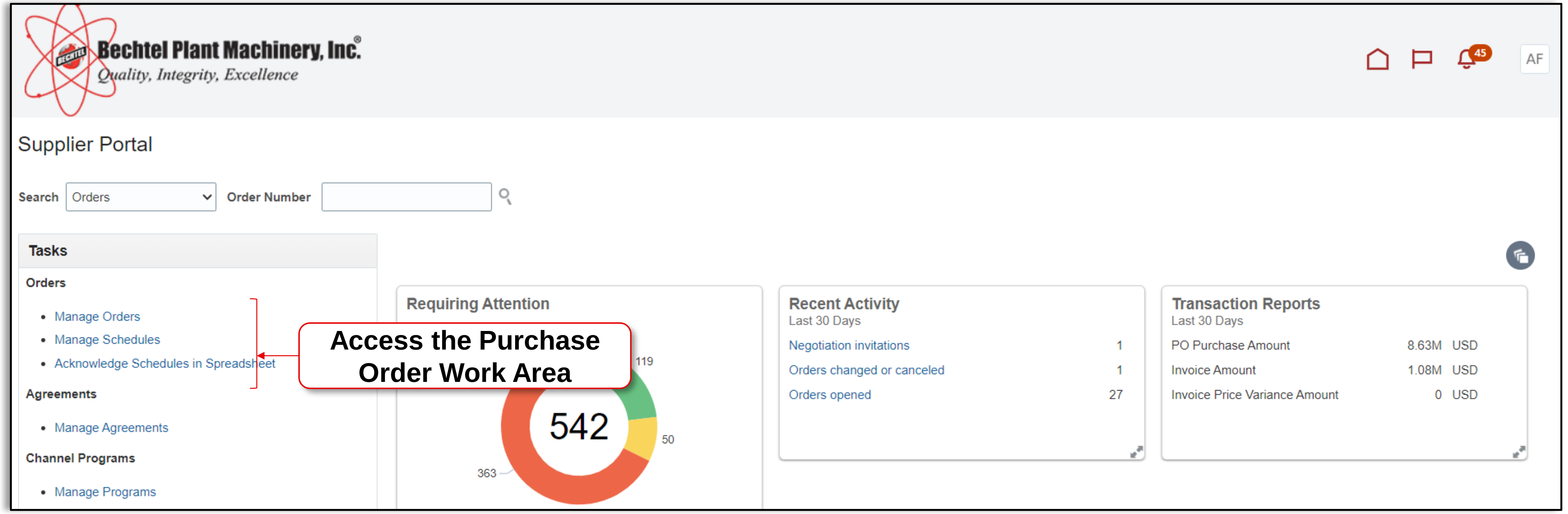
Supplier Portal – Purchase Order Work Area

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.



PURCHASE ORDERS – ACKNOWLEDGE PO

Supplier Portal – Acknowledge Purchase Order

Acknowledge and accept a purchase order.

View/Acknowledge Purchase Order

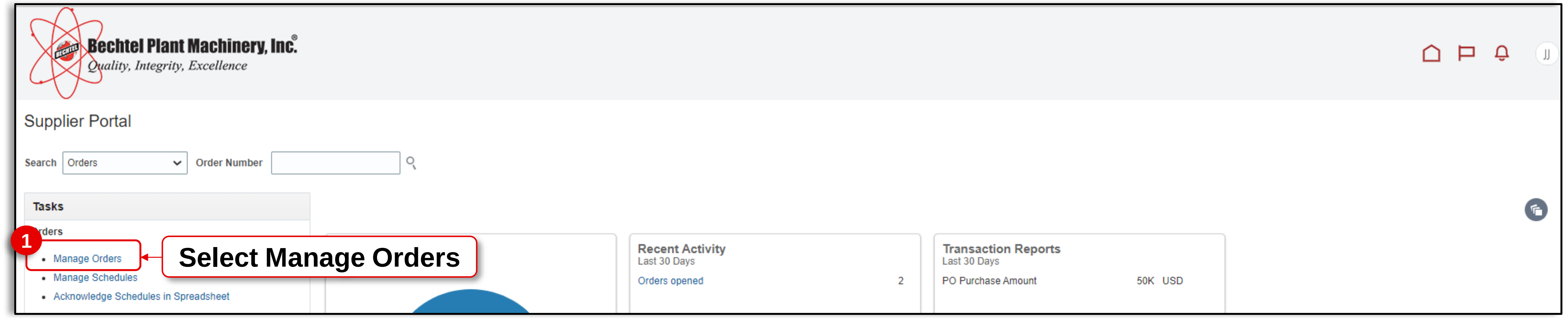
Within the Supplier Portal, a supplier can acknowledge and respond to purchasing documents and amendments.
All purchase orders requiring confirmation should be acknowledged within time frame specified on the PO.

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.

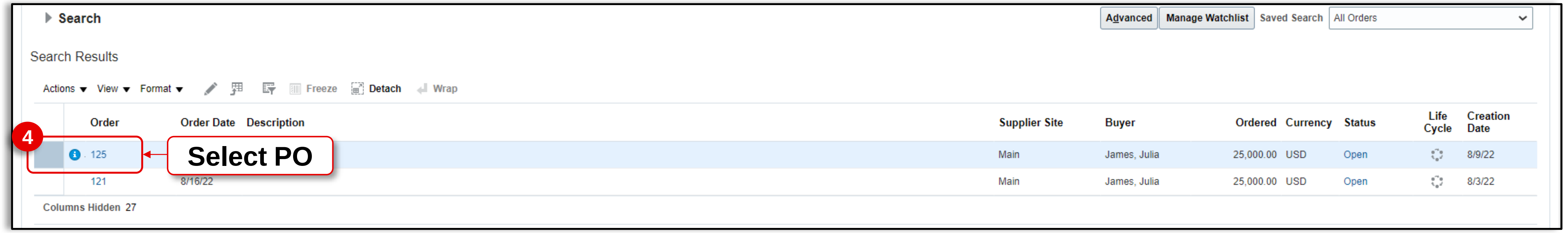
View/Acknowledge Purchase Order

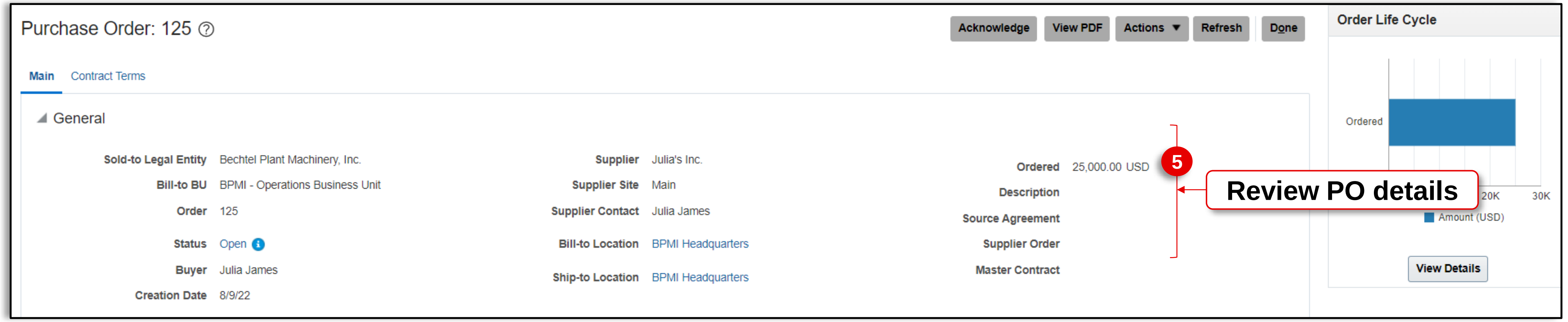
4. The results of the search populates in the search results section. Select the **purchase order** to acknowledge.

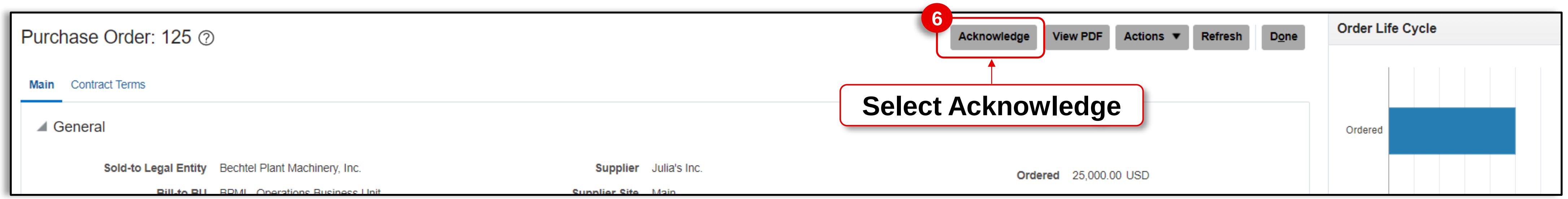
5. The purchase order details display. Review the purchase order in its entirety. Navigate through the various sections of the PO (e.g., Header, Notes & Attachments, Lines, etc.)

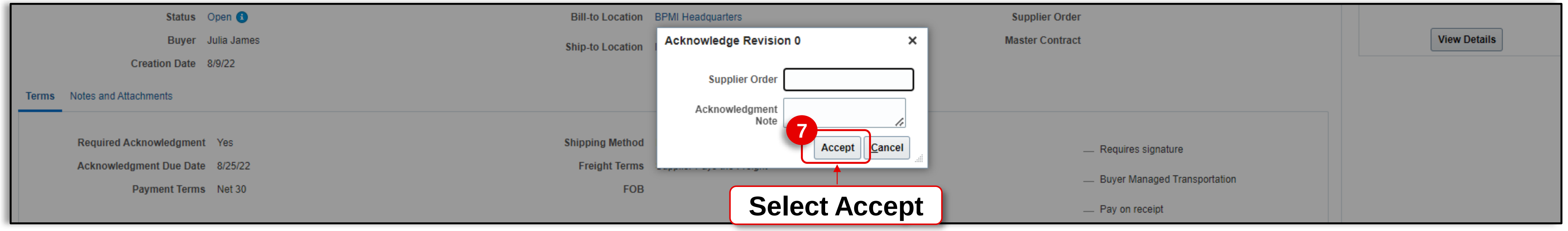
6. Once the review is complete, select **Acknowledge**.

7. Enter a Supplier Order Number and an Acknowledgement Note, if applicable. Select **Accept**.









PURCHASE ORDERS – MANAGE PO LIFECYCLE

Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

Manage PO Life Cycle

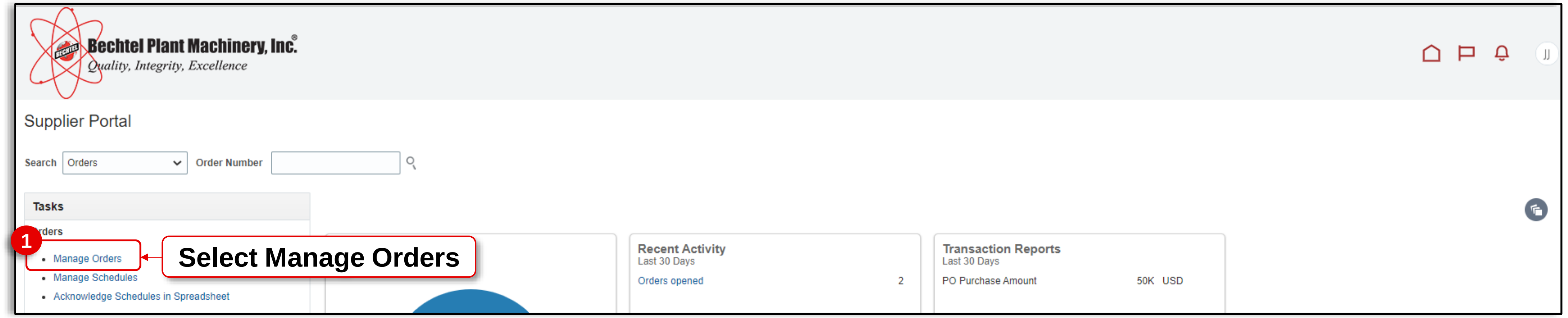
1. Select the **Manage Orders** link on the Supplier Portal home page.

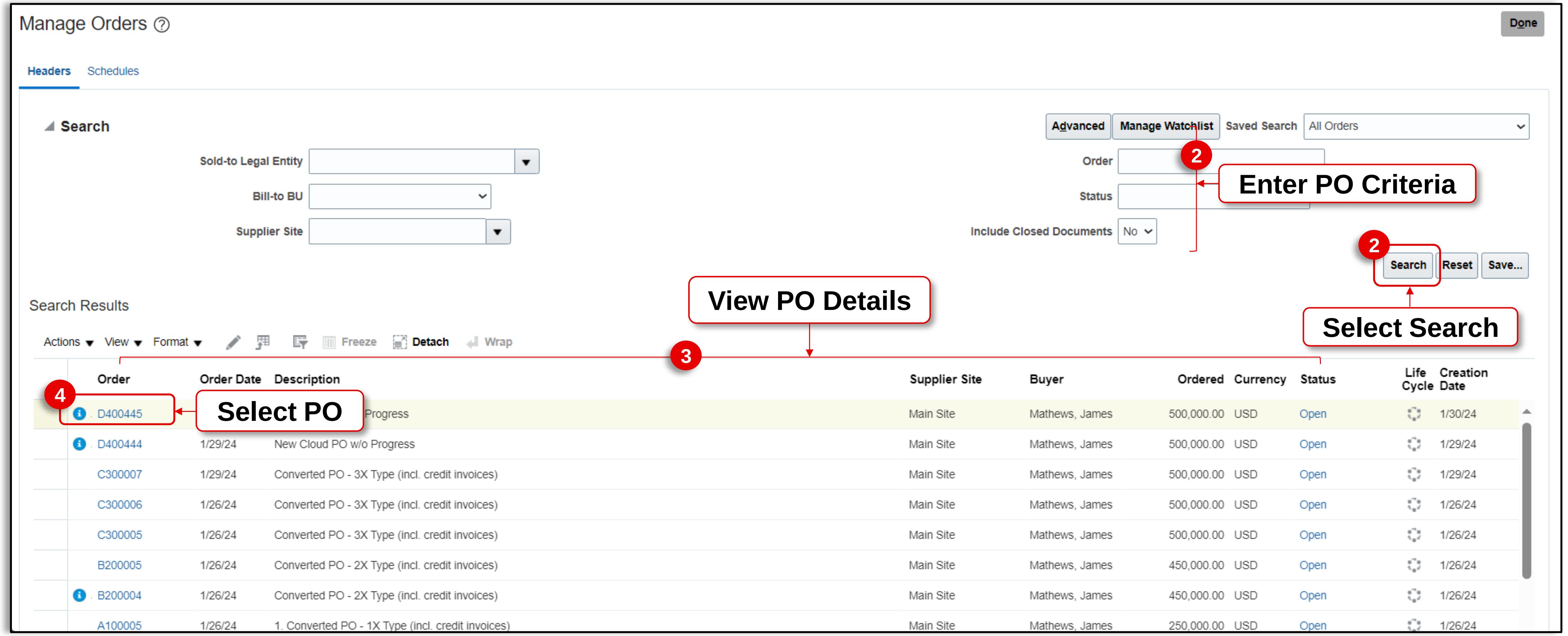
2. On the Manage Orders page, select **Search** to view all orders. Alternatively, search for a specific PO by entering details in the search criteria fields. When finished, select **Search** to populate the appropriate PO(s) in the Search Results section.

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.





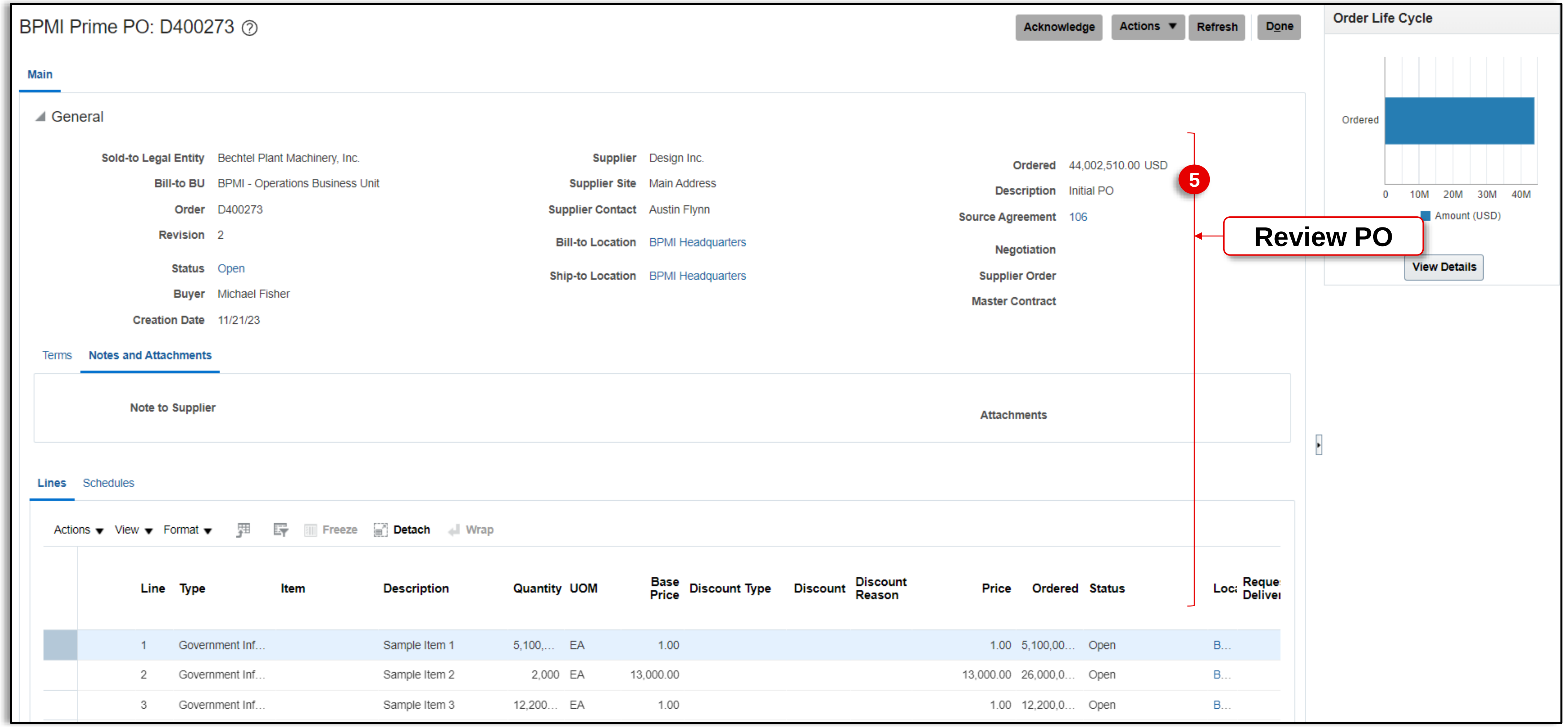
Supplier Portal – Manage PO Lifecycle

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.



Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

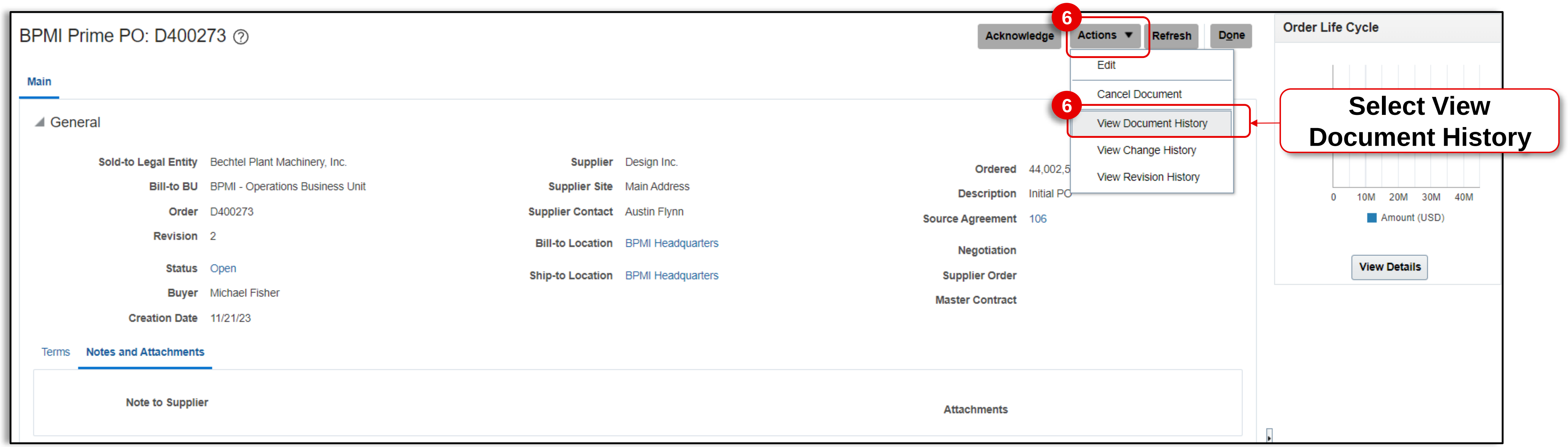
Manage PO Life Cycle

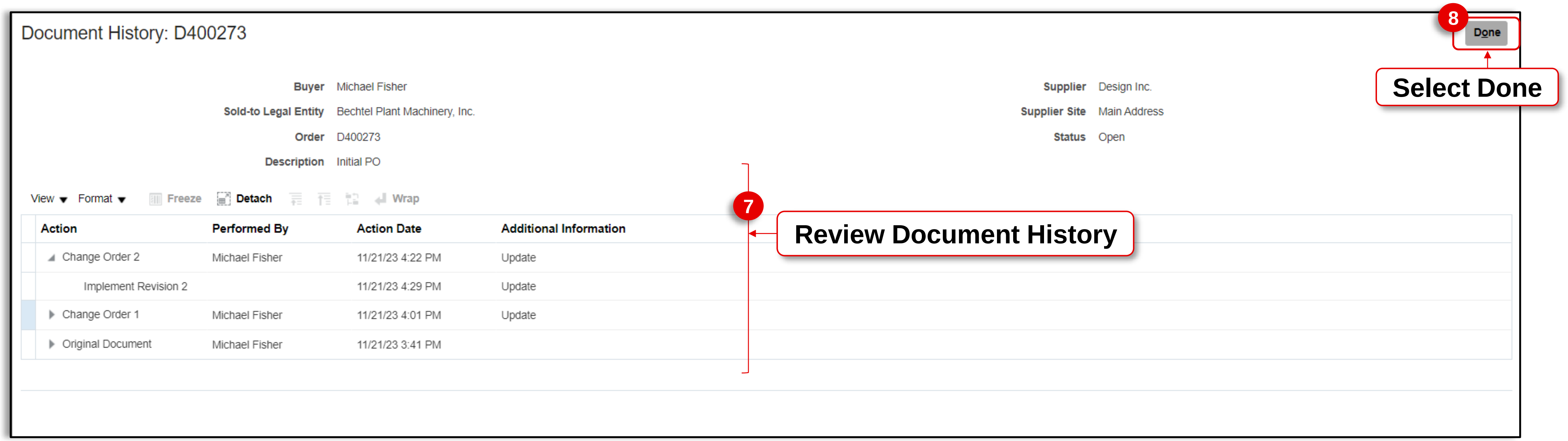
Document History

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, Preformed By, Action Date, etc.

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





Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

Manage PO Life Cycle

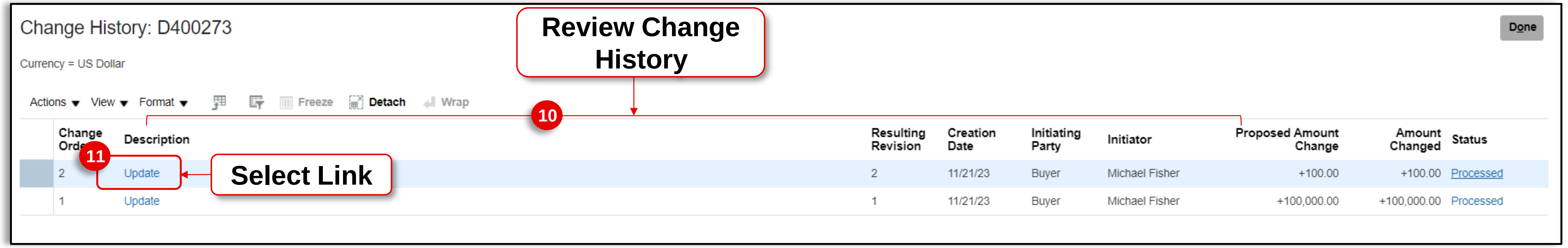
Change History

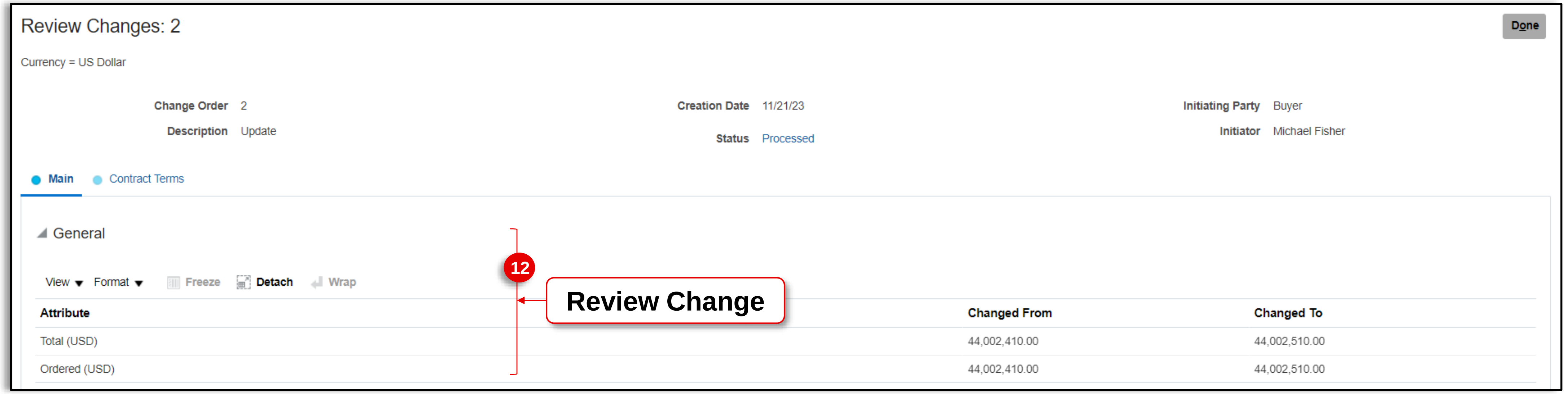
9. To access an order's change history (i.e., Amendments), select the **Actions** button and choose **View Change History** from the list.

10. On the Change History page, review change history. Details on this page include, Change Order Number, Description, Initiating Party, etc.

11. To see the specifics of a change order, select the **link** in the Description field.

12. 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.





Supplier Portal – Manage PO Lifecycle

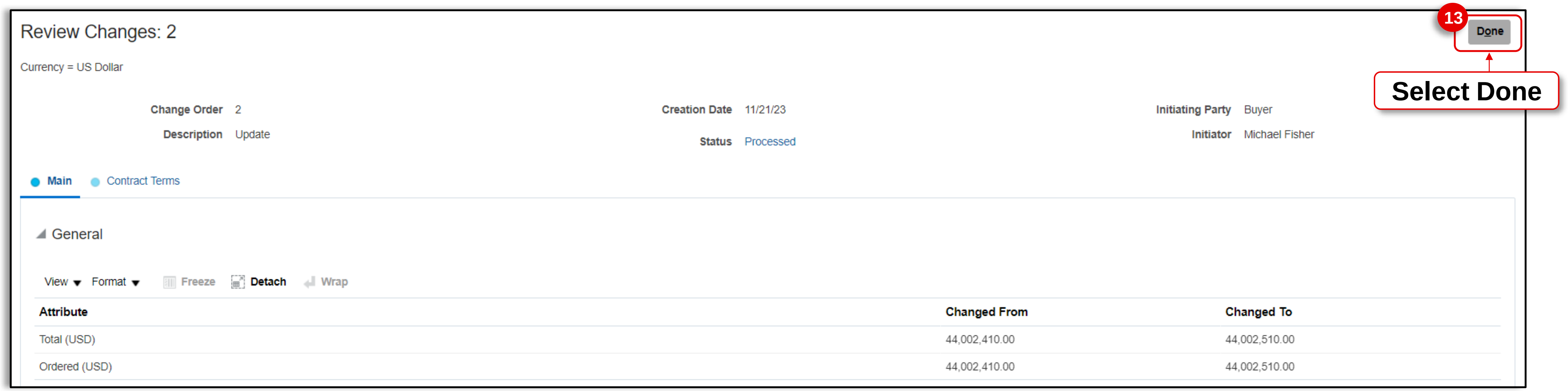
View and manage active purchase orders.

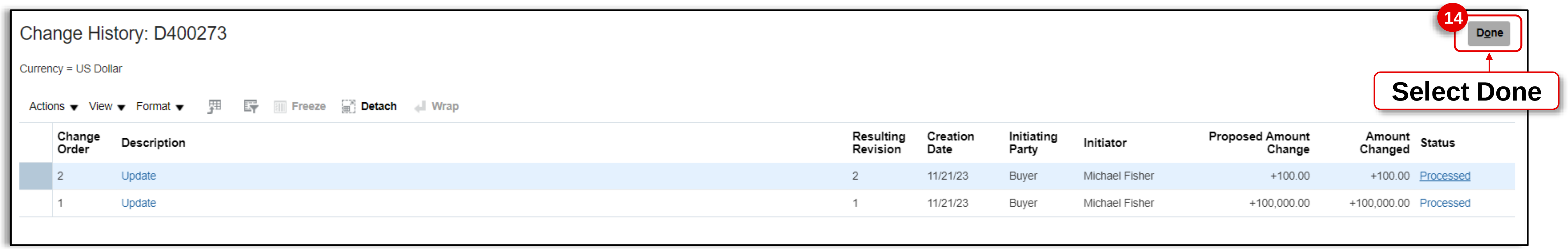
Manage PO Life Cycle

Change History

13. When finished, select **Done** to return to the Change History page.

14. Select **Done** to return to the Purchase Order Details page.





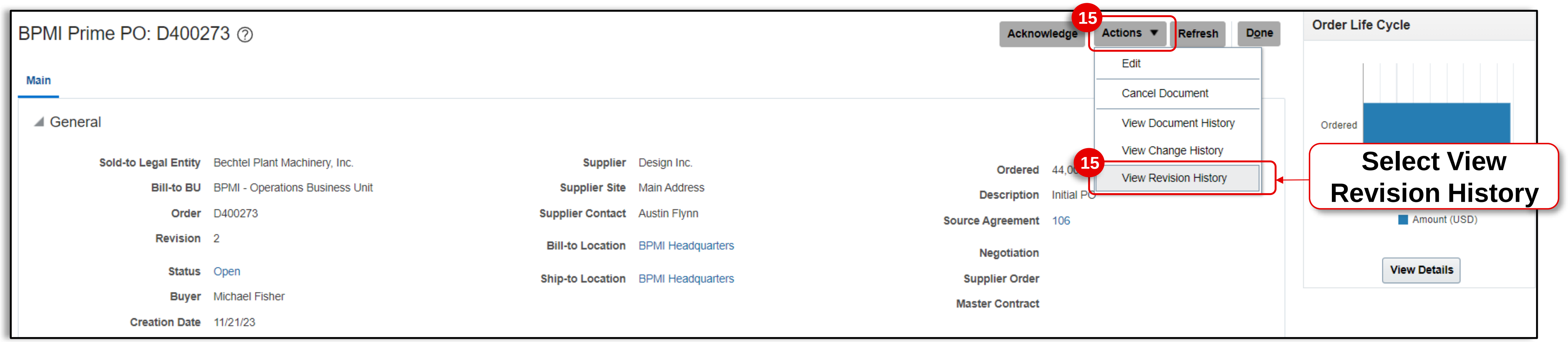
Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

Manage PO Life Cycle

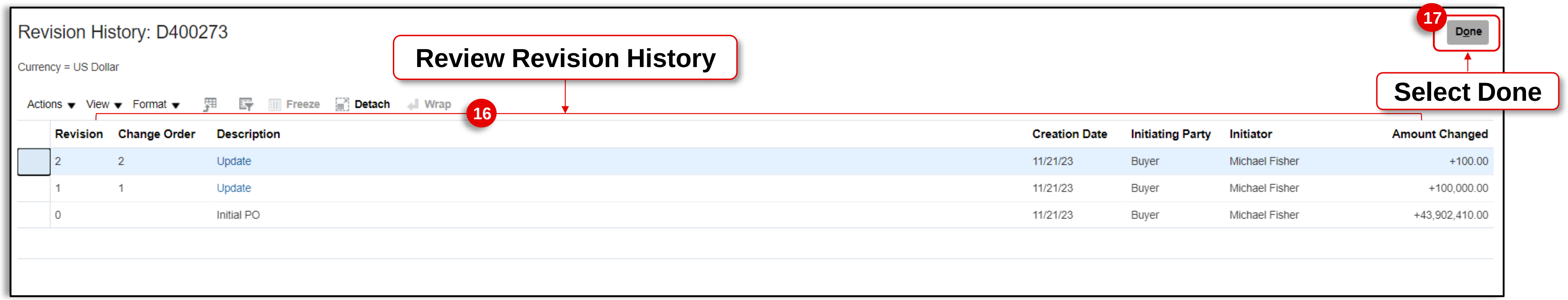
Revision History

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.

Supplier Portal – Manage PO Lifecycle

View and manage active purchase orders.

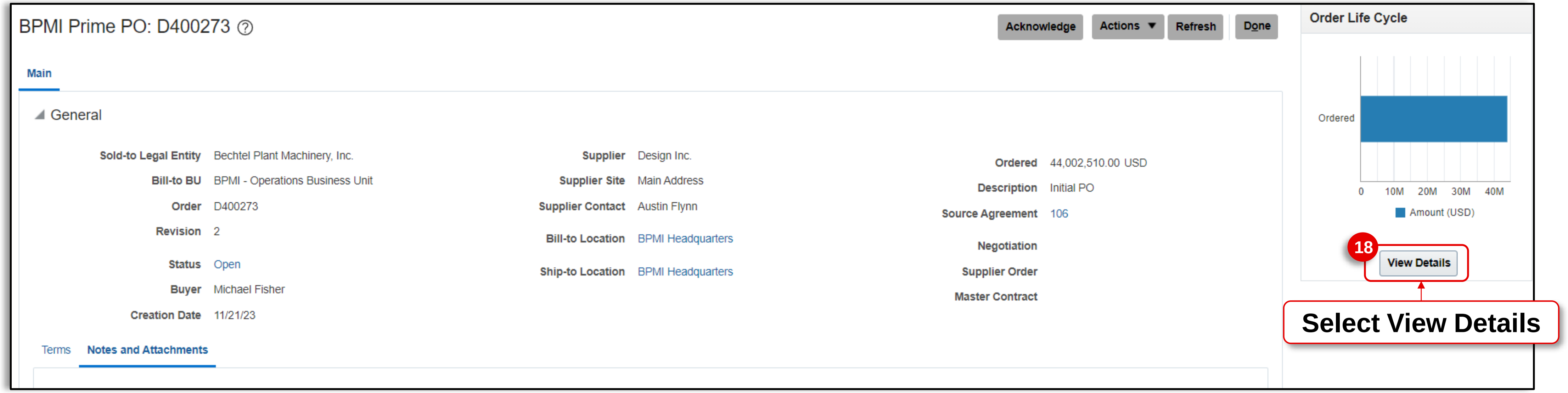
Manage PO Life Cycle

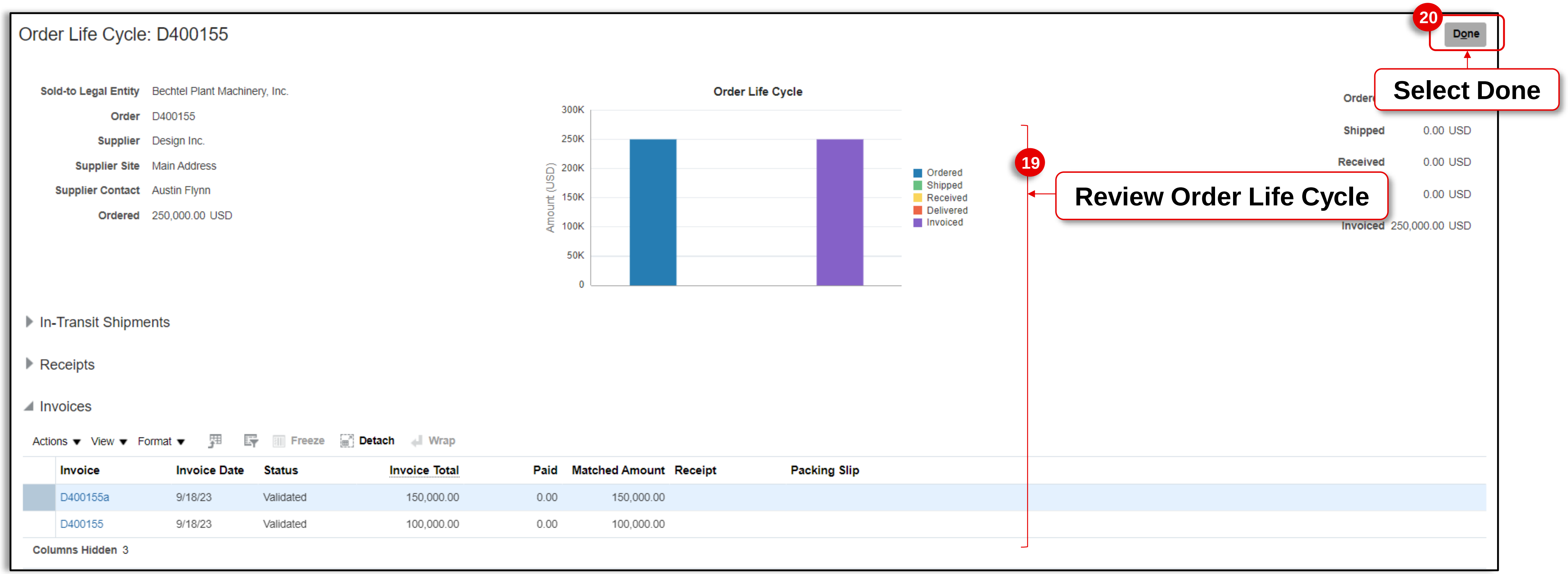
Order Life Cycle

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.





INVOICE & PAYMENTS WORK AREA

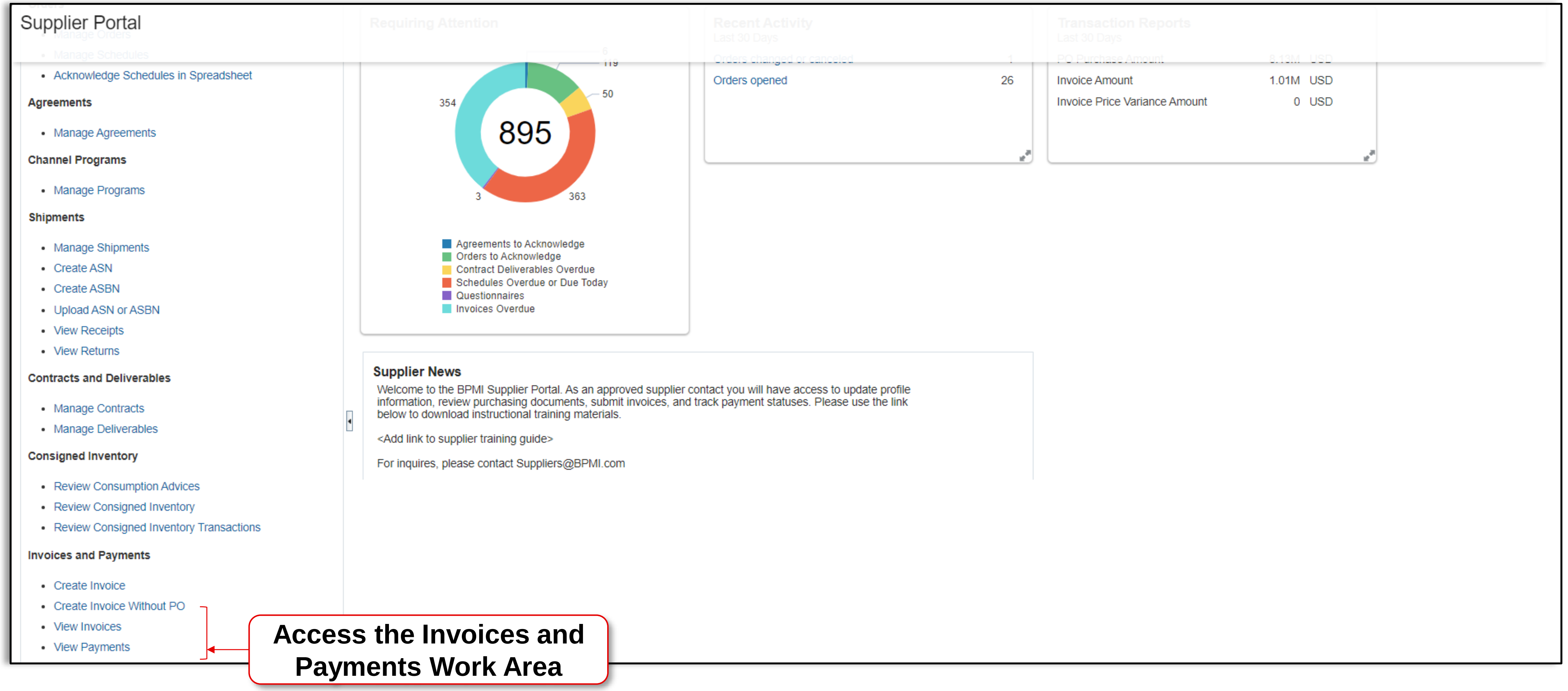
Supplier Portal – Invoices & Payments Work Area

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.



VIEW INVOICES

Supplier Portal – View Invoices

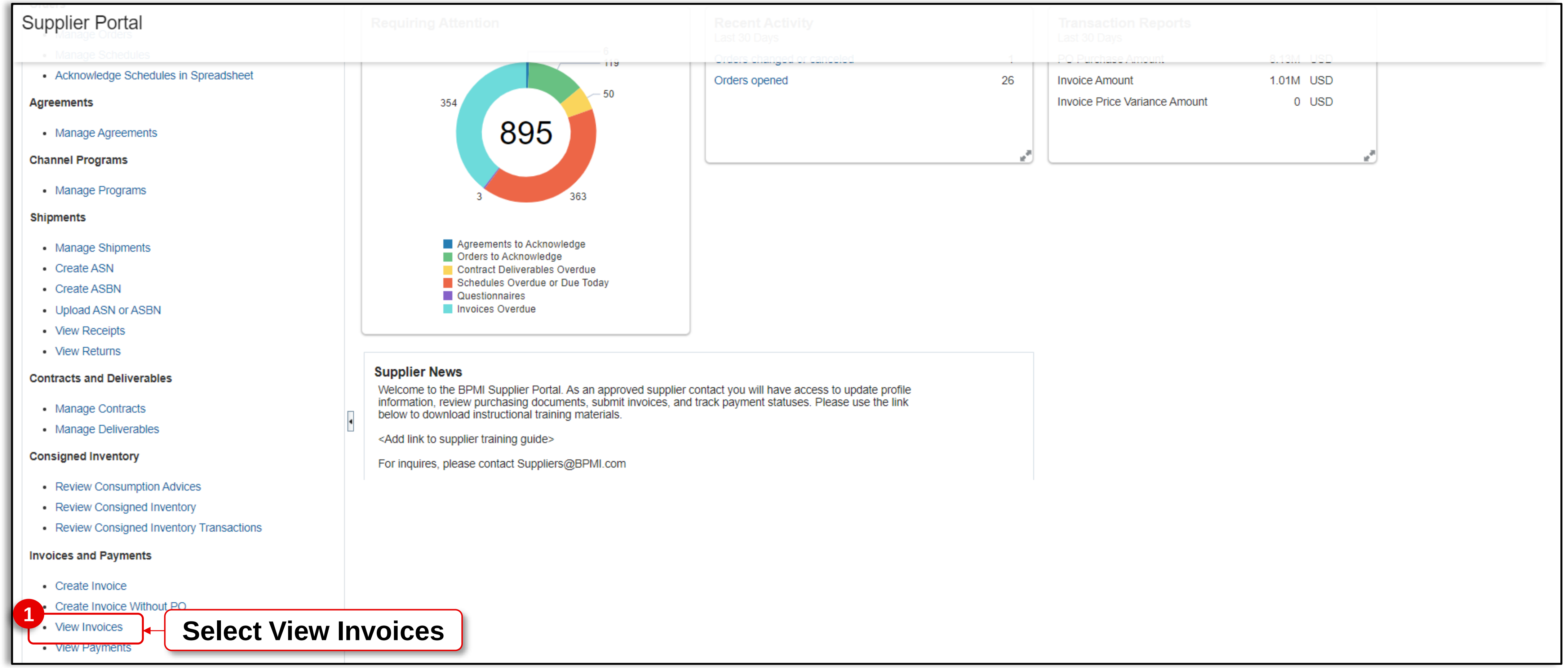
Track the status of submitted invoices.

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 preforming the search.

3. Select **Search**.



Supplier Portal – View Invoices

Track the status of submitted invoices.

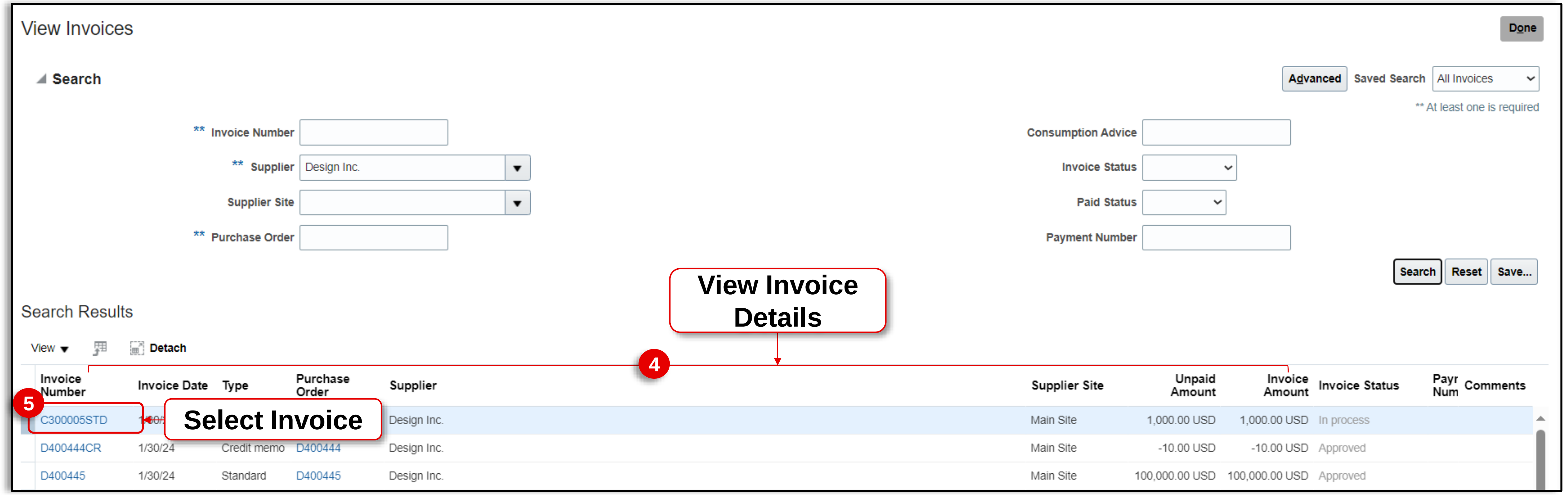
View Invoices

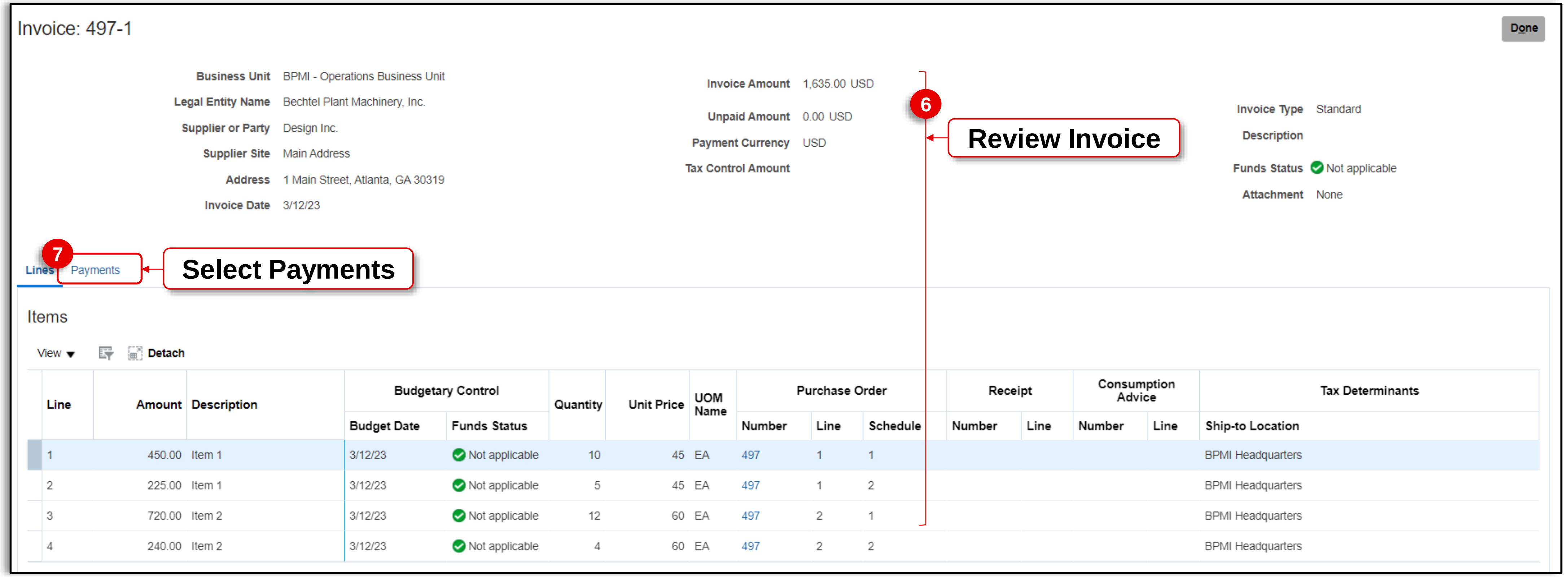
4. The results of the search populates in the Search Results section. There, a supplier is able to view various details about the invoice. Details such as Invoice Number, Invoice Date, Type, Purchase Order, Invoice Amount, etc.

5. View details of a specific invoice by selecting the link in the **Invoice Number** field.

6. 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.

7. Select the **Payments** tab to view details of the payments for the invoice.





Supplier Portal – View Invoices

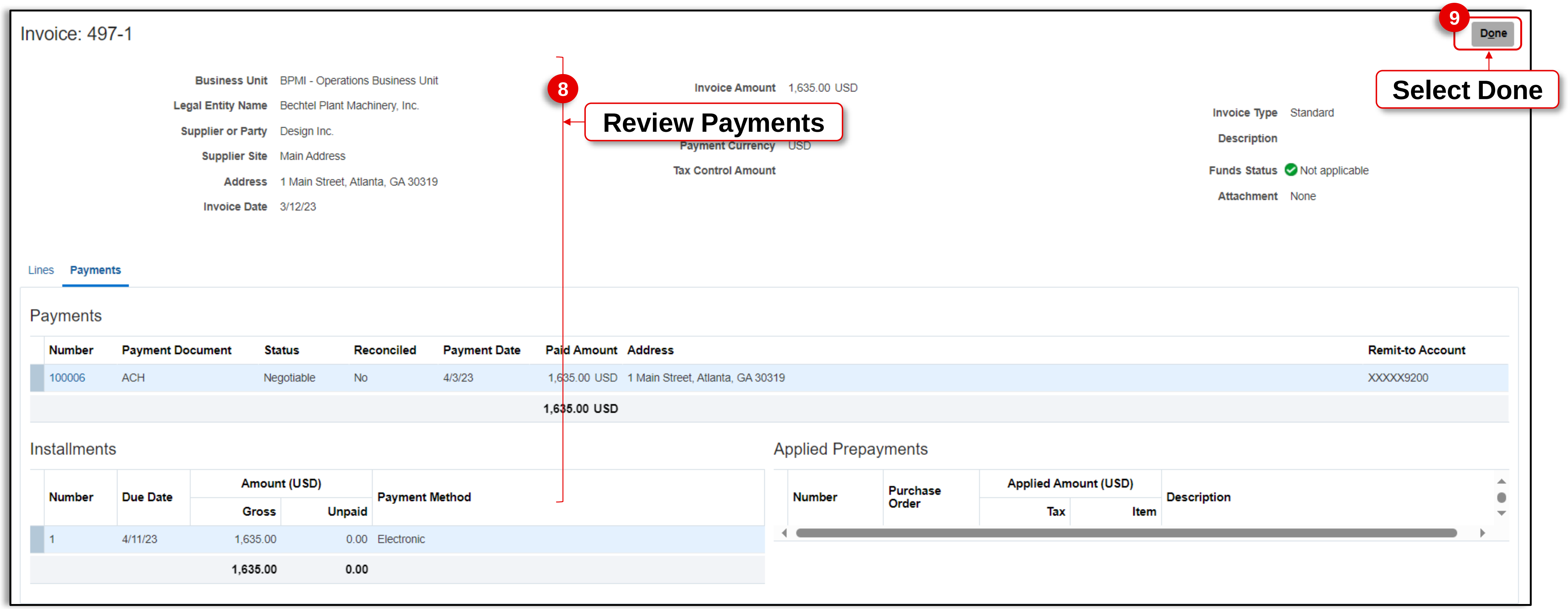
Track the status of submitted invoices.

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**.



VIEW PAYMENTS

Supplier Portal – View Payments

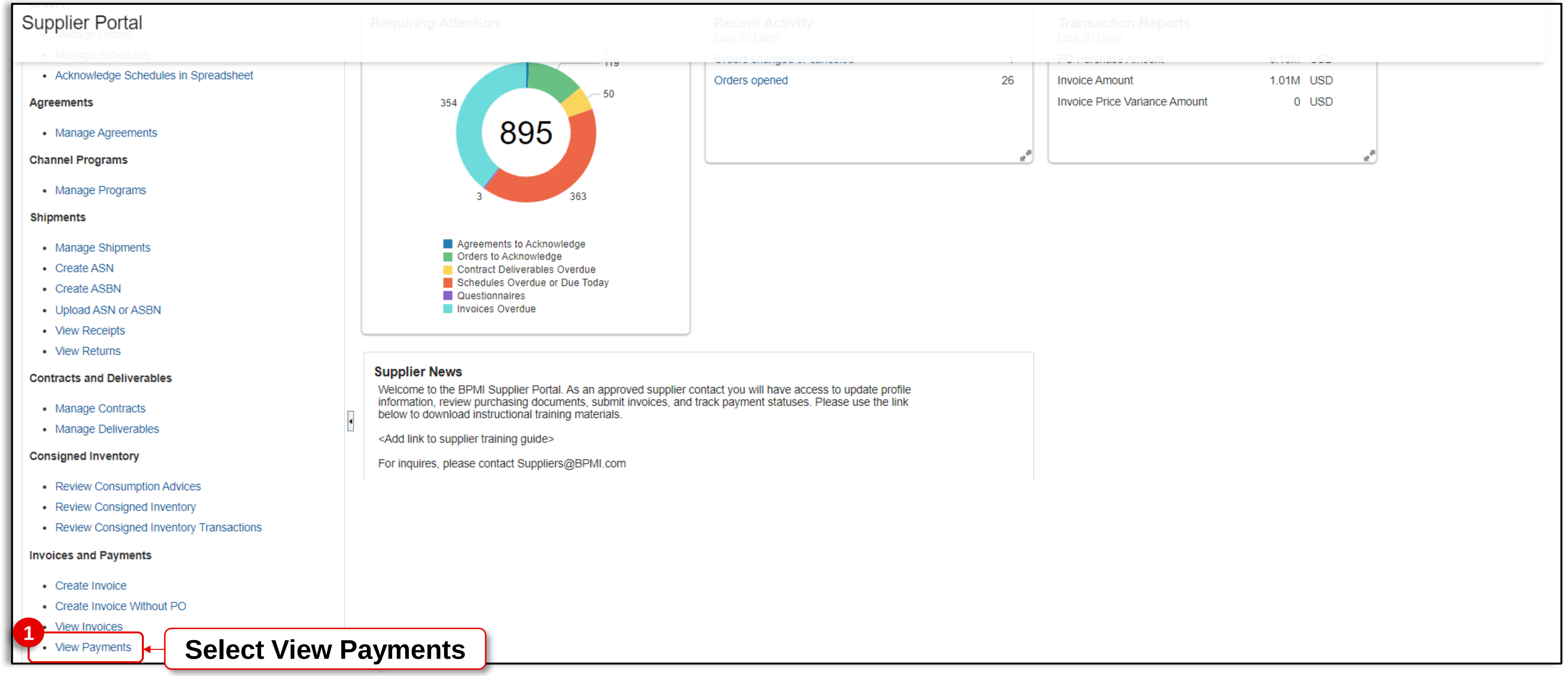
Track the status of payments.

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 preforming the search.

3. Select **Search**.



Supplier Portal – View Payments

Track the status of payments.

View Payments

4. 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.

5. View details of a specific payment by selecting the link in the **Payment Number** field.

6. 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.

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

7. When finished reviewing the payment, select **Done**.