

# Birmingham City Council Supplier Portal Quick Reference Card - General

## Key Information

- In easy steps the Suppliers Portal can be used for uploading sales invoices directly against the purchase orders Birmingham City Council have issued you.
- You can view your account to confirm payment dates and also identify items included in payments already received by you.

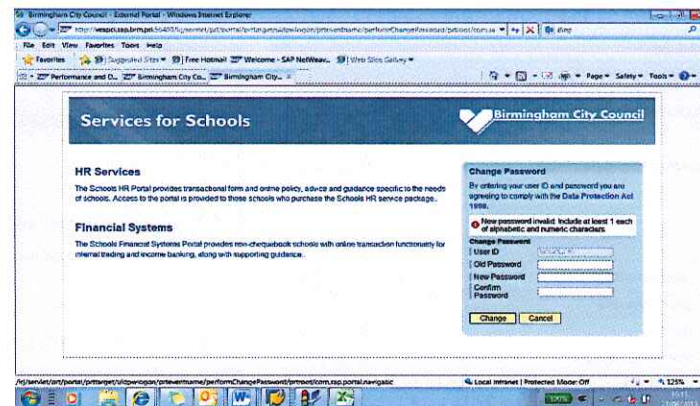
## How to Logon to portal

Simply enter your personal userid and password supplied as shown below and press  button.




## How to Change your password

When you first logon to the portal or if you ask for a password reset you will be directed to the screen below in order to change your password to ensure it is secure.



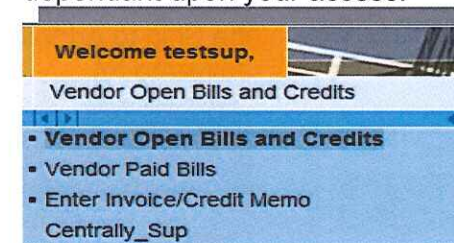
Your userid will be defaulted in and you will have to type in your initial/last password and also your new password in both the new password and confirm password box. Once you have done this select the

 button to save your new password.

 Please note for security purposes your password must include at least one alphabetic and 1 numeric character. Userid's must not be shared with other people in your organisation and you should keep your password secure.

## Getting Started

You will be presented with the following menu options dependant upon your access:-



Within Help and Support you can locate separate Quick Reference Cards on each menu option.

- Vendor Open Bills and Credits
- Vendor Paid Bills
- Enter Invoice/Credit Memo Centrally – Single lined purchase order
- Enter Invoice/Credit Memo Centrally – Multi lined purchase order

Please read and print off relevant Quick Reference Cards before selecting the option.

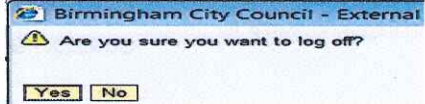
## Exiting Screens

There are different messages on different screens to help you navigate back to the original screen. These can be found in the top right hand side of screens

[Back to Invoice](#)

[Back to Initial Screen](#)

To ensure security of your records select the [Log off](#) message when you have finished using the portal – This message will

appear  - simply select [Yes](#).

## How to identify the requisitioner of a purchase order

The requisitioners name and phone number is shown on the Purchase Order. It is also possible to locate via the supplier portal.

From the menu select -

- Enter Invoice/Credit Memo Centrally\_Sup

Enter the purchase order number in the *Find Invoice/Credit Memo* display area and select **Start**

Display

To display or edit invoices, first find an invoice.

### Find Invoice/Credit Memo

Purchase Order Number Invoice Number (Internal)

4510013390

**Start** Extended Search

The system will generate a list of invoices already input against the purchase order – simply double click onto one of the underlined numbers (turning it orange)


Number	Name	Invoice Number
<u>10000000112</u>		TEST3 110613
<u>10000000116</u>		TEST2 110613
<u>10000000208</u>		TEST1 110613
<u>1000000370</u>		TEST 030613
<u>1000000172</u>	Cancelatn Inv. 1000000170	XTEST 030613



You will be taken to a view only item overview screen – If no invoices have been entered previously against the purchase order then the same screen can be accessed when entering invoices in create mode.

Select the **Header Data** tab which will display the following options

[Basic Data](#) | [Payment Data](#) | [Taxes](#) | [Partner](#) | [Documents](#) | [History](#) | [Versions](#) | [Approval](#)

Select **Partner** - This will display information such as Requester (i.e. person who requisitioned the item) or the Ship to Address (i.e. shows where the goods were delivered to).

Function	Number	Name	Action
Invoicing Party	1000064190	BHAT SINGH SABHA (HIGHGATE)	
Invoicing Party Employee			
Vendor	1000064190	BHAT SINGH SABHA (HIGHGATE)	
Ship-From Address			
Contact Person			
Service Agent			
Requester	108984	Mohammed Omar	
Goods Recipient	108984	Mohammed Omar	
Ship-To Address	100007	BCC	
Location	100001	Birmingham City Council	

By selecting the  you can view full details. The  can be used to email the requester (requisitioner) direct.

## Unusual Screen

As the Supplier Portal shares the same platform as our Schools Portal then occasionally you may find yourself presented with this screen.

### Services for Schools



Pre production Environment

#### HR Services

The Schools HR Portal provides transactional form and online policy, advice and guidance specific to the needs of schools. Access to the portal is provided to those schools who purchase the Schools HR service package.

#### Financial Systems

The Schools Financial Systems Portal provides non-checkbook schools with online transaction functionality for internal trading and income banking, along with supporting guidance.

Log in

By entering your user ID and password you are agreeing to comply with the Data Protection Act 1998.

Username

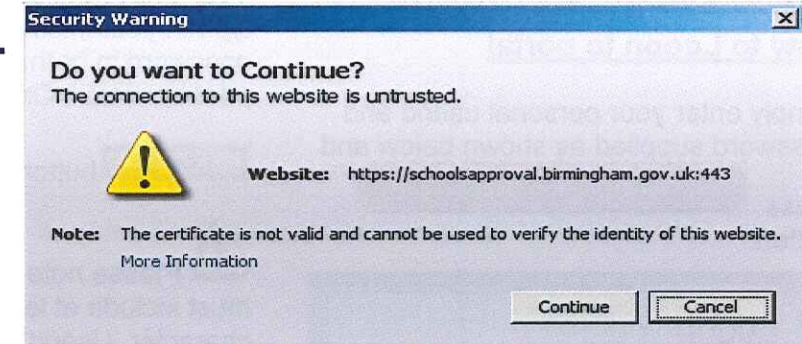
Password

## Security Warnings

Windows 7 users may see this warning message appear. Please select 'Always trust content from this publisher' and the warning message will not be displayed on subsequent logins.



Users with earlier versions of Windows such as XP may see this error message, please select continue. This message may be displayed on subsequent logins but is not a cause for concern.



If this happens you can try logging back in using your supplier portal id – selecting Log in to Finance Systems or alternatively simply exit your internet session and start again.