



Supplier Portal Management

Participant Guide

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Note: Contents may change without notice.



Topic Objectives

After completing this course, you should be familiar with the following processes:

- ◆ Log On/Log Off the Supplier Portal
- ◆ Register a Customer as a Supplier
- ◆ Update the Supplier Account
- ◆ Respond to Bid Opportunities
- ◆ Check Bid Status
- ◆ Create a Best and Final Offer
- ◆ Submit an Invoice
- ◆ View Invoice List

Supplier Portal Management

Using the Supplier Portal: Navigation and Registration



The Supplier Portal allows suppliers to access the RTA's Procurement system through a browser.

Suppliers can register themselves as a supplier, respond to events, update their supplier information, negotiate terms, maintain subcontractors, and look up information relating to their contracts.

This process covers the steps performed by a Supplier to log on or log off of the Supplier Portal.

Step-By-Step Procedure: Log On/Off Supplier Portal




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. To log off the supplier portal, click the  icon in the upper right corner of the screen and then select **Sign out** from the drop-down list.

Expected Results:

You have successfully logged in and logged out of the supplier portal.

Step-By-Step Procedure: Register as a Supplier in the Supplier Portal



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Register** from the drop-down list. You may also select **Register As A Supplier** from the **More** drop-down list in the menu bar.
3. Review the Terms and Conditions and select the **checkbox** to accept.
4. Click the **Next** button.
5. In the **Become A Supplier – Create an Account** section, complete the required fields:

Field	Value
User Name	Enter the user name. Note: Username is case sensitive.
Password	Enter the password.
Confirm Password	Reenter the password to be used.

6. In the **Enter Information About Yourself** section, complete the required fields:

Field	Value
First Name	Enter your first name.
Last Name	Enter your last name.
Phone Number	Enter the 10 digit phone number to be used.
Email Address	Enter the email address to be used to receive notifications.

7. Click the **Next** button.
8. In the **Company Information** section, complete the required fields:

Field	Value
Company Name	Enter the company name.
Doing Business As	Enter the doing business as information if applicable.
Dun and Bradstreet	Enter the company Dun and Bradstreet number.
Business Type	Select the business type from the drop-down list.
Tax ID Type	Select the tax id type from the drop-down list.
Tax ID	Enter the company tax id number.
Website	Enter the company website as www. Format.

Note: VAT Registration Country and VAT Registration Number are for non-U.S.A. based countries. Please leave blank if you do not have a VAT number.

9. In the **Address Information** section, complete the required fields:

Field	Value
Country	Select the country from the drop-down list.
Street Address	Enter the street address.
City	Enter the city.
State/Province	Select the state/province from the drop-down list.
Post Code	Enter the post code.
Remit to Information	Click the checkbox if the remit to address is the same as the mailing address. If not, completed the remit to information.

10. Click the **Next** button.

Note: For security purposes, please do not submit banking information. Banking information will be requested by the RTA Procurement and Contracting at time of award.

11. You will skip the **Bank Information** screen as you should not submit any banking information until requested by the RTA Procurement and Contracting.
12. Click the **Next** button.

13. On the **Diversity Codes** screen, click the **Create** button and complete the required fields:

Note: Registration on RTA Chicago’s Supplier Portal requires selecting a diversity code, gender, and/or ethnicity as part of supplier registration.

Field	Value
Diversity Code	Select the diversity, gender, or ethnicity from the drop-down list.
Effective Date	Enter the effective date.
Expiration Date	Enter the expiration date
Attachment	Select a file to attach.

14. Click the **OK** button.

Note: Repeat steps #13 – 14 for as many codes that apply to your organization.

15. Click the **Next** button.
16. On the **Questions** screen; answer any and all question(s) listed and attach document(s) as required.
17. Click the **Next** button.
18. Click the **Select Commodity Codes** button.
19. Select the appropriate **Commodity Code(s)**.

Note: Registration on RTA Chicago’s Supplier Portal requires selecting one or more commodity code(s) relevant to your business.

20. Click the **Attach to Contact** button.
21. Click the **Close** button.
22. Click the **Next** button.
23. On the **Certifications** screen, click the **Create** button and complete the required fields:

Note: Registration on RTA Chicago’s Supplier Portal requires selecting certification(s) as a part of supplier registration.

Field	Value
Contact	Select the contact.
Commodity Code	IF certification is for a commodity code, then select the commodity code. If not, leave blank.
Certification Code	Select the certification you would like to register from the drop-down list.
Effective Date	Enter the effective date.
Expiration Date	Enter the expiration date
Attachment	Select the file to attach.

24. Click the **OK** button.



Note: Repeat steps #23 – 24 for as many certifications that apply to your organization.

25. Click the **Next** button.
26. On the **Proxy Notifications** screen, click the **Create** button and complete the required fields:

Field	Value
First Name	Enter the first name of proxy
Last Name	Enter the last name of proxy.
Email Address	Enter the email address of proxy.
Receive Notification	Select Yes or No from the drop-down list.

27. Click the **Next** button.
28. On the **Status** screen, the Supplier Number is assigned and a message of Registration Status: Complete displays.

Note: The next (3) steps will allow you to finalize your account and enable the reset password feature.

29. To log off the supplier portal, click the  icon in the upper right corner of the screen and then select **Sign out** from the drop-down list.
30. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list. Enter your **User Name** and **Password** to sign in.


31. Please answer the security question that appears. Then hit the Tab button on your keyboard, then finally click the **Save** button.

Expected Results:

You have successfully completed the supplier registration and a supplier number has been assigned.

Step-By-Step Procedure: Navigate Supplier Portal




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. On the **Supplier Portal** screen, click the tabs in the Navigation bar. Each tab may or may not display a drop-down list. However, the various links corresponds to an array of transactions that can be taken by the supplier.
7. For example, select **Events** in the Navigation bar, then select **Browse Open Events** from the drop-down list to view open events.

Expected Results:

You have successfully navigated the Supplier Portal.

Step-By-Step Procedure: Supplier Updates Account in Supplier Portal




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Click **My Account** in the Navigation bar.
7. On the **Account Information** screen, update the necessary changes to the Supplier account. You may also scroll down and update information on the various tabs found on the left hand side of the screen.
8. Click the **Save** button.

Expected Results:

You have successfully updated the supplier account.

Step-By-Step Procedure: Supplier Changes Password using Security Question




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Click the **Forgot your password?** Link.
4. Enter your User Name in the **User Name** field.
NOTE: User name is case-sensitive.
5. Click the **Reset** button.
6. Answer your security question(s).
7. Click the **Reset** button.
8. On the **Reset Password** screen, enter the new password in the **New Password** field.
9. Retype the new password in the **Confirm New Password** field.
10. Click the **Save** icon.

Expected Results:

You have successfully reset the supplier portal password.

Step-By-Step Procedure: Add a Subcontractor in the Supplier Portal



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Contracts** in the Navigation bar, then select **Subcontractors** from the drop-down list.
7. Click the **Subcontractors** tab.
8. Click the **Create** button.
9. On the **Company Information** tab, complete the required fields:

Field	Value
Company Name	Enter the company name.
Doing Business As	Enter the doing business as information if applicable.
Dun and Bradstreet	Enter the company Dun and Bradstreet number.
Business Type	Select the business type from the drop-down list.
Tax ID Type	Select the tax id type from the drop-down list.
Tax ID	Enter the company tax id number.

Note: VAT Registration Country and VAT Registration Number are for non-U.S.A. based countries. Please leave blank if you do not have a VAT number.

10. In the **Address Information** section, complete the required fields:

Field	Value
Country	Select the country from the drop-down list.
Street Address	Enter the street address.
City	Enter the city.
State/Province	Select the state/province from the drop-down list.
Post Code	Enter the post code.
Active	Select the checkbox.

11. Click the **Save** button.
12. Click the **Diversity** tab.
13. Click the **Create** button.
14. On the **Subcontractor Diversity** screen, complete the required fields:

Note: Registration on RTA Chicago’s Supplier Portal requires selecting a diversity code, gender, and/or ethnicity as a Diversity Code as a part of supplier registration.

Field	Value
Diversity Code	Select the diversity, gender, or ethnicity from the drop-down list.
Effective Date	Enter the effective date.
Expiration Date	Enter the expiration date
Attachment	Select a file to attach.

15. Click the **Save** button.
16. Click the **Browser Back** button.

Note: Please repeat steps #13 – 16 for as many Diversity Codes that apply to the subcontractor.

17. Click the **Contacts** tab.
18. Click the **Create** button.
19. On the **Subcontractor Contact** screen, complete the required fields:

Field	Value
First Name	Enter the first name of the primary contact on the account.
Last Name	Check the last name of the primary contact on the account.
Contact Title	Enter the primary contacts title.
Phone Country Code	Enter the phone number to be used.
Phone Number	Enter the phone number of the business/contact including are code.
Extension	Enter the extension for this contact
Fax Country Code	Enter the fax country code for international dialing.
Phone Number	Enter the fax number for this contact.
Extension	Enter the extension for this contact
Email Address	Enter the email address for this contact.

20. In the **Mailing Address** section, enter the mailing address information in the following fields:

Field	Value
Country	Select the country code, and the address format will appear.
Street Address	Enter the street address for the supplier.
City	Enter the city for this supplier's address.
State/Province	Enter or select the state/province for the address.
Post Code	Enter the zip code.

21. Click the **Save** button.
22. Click the **Browser Back** button.
- Note:** Please repeat steps #18 – 22 for as many contacts that apply to the subcontractor.
23. Click the **Comments** tab to attach documents related to the subcontractor.
24. Click the **Create** button.
25. On the **Subcontractor Comment** screen, complete the required fields:

Field	Value
Title	Enter the title for the comment.
Comment	Enter the comment.
Attachment Title	Enter an attachment title.
Attachment	Select the file to attach.

26. Click the **Save** button.
27. Click the **Browser Back** button.

Note: Please repeat steps #24 – 27 for as many comments that apply to the subcontractor.

28. Click the **Certifications** tab.
29. Click the **Create** button.
30. On the **Subcontractor Certification** screen, complete the required fields:

Note: Registration on RTA Chicago’s Supplier Portal requires selecting certification(s) as a part of supplier registration.

Field	Value
Certification Code	Select the certification code from the drop-down list.
Effective Date	Enter the effective date.
Expiration Date	Enter the expiration date.
Attachment Title	Enter the attachment title.
Attachment	Select the file to attach.

31. Click the **Save** button.
 32. Click the **Browser Back** button.
- Note:** Please repeat steps #29 – 32 for as many certifications that apply to the subcontractor.
33. Click the **Commodity Codes** tab.
 34. Click the **Attach Commodity Code** button.
 35. On the **Commodity Codes** screen, select the checkbox to the left of any Commodity Code(s) associated with the company.
 36. Click the **Attach to Subcontractor** button.

37. Click the **Close** button.

Expected Results:

You have successfully added a subcontractor in the Supplier Portal.


Managing Opportunities and Bids

Suppliers can respond to events that are flagged to show on the portal as long as they are registered. Unregistered suppliers are prompted to sign in or required to register in order to respond to an event.

This process covers the steps performed by a Supplier to manage opportunities and bids in the Supplier Portal.

Step-by-Step Procedure: Review Open Events in the Supplier Portal




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **Browse Open Events** from the drop-down list.
7. On the **Open Events** screen, enter the desired search criteria *if applicable*.
8. Click the **Search** button.
9. Highlight the open event to be viewed.
10. Click the **View Event** button.
11. Review the **Event Summary** screen and print the event summary if desired, by clicking the **Print** button.

Expected Results:

You have successfully reviewed the Event Summary screen and printed, if desired.

Step-by-Step Procedure: Supplier Bids/Responds to an Event in Supplier Portal



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **Browse Open Events** from the drop-down list.
7. On the **Open Events** screen, enter the desired search criteria *if applicable*.
8. Click the **Search** button.
9. Highlight the open event to be viewed.
10. Click the **View Event** button.

The *Event Summary* screen appears.
11. Click on the various tabs to view event information.
 - **Summary Tab:** Brief overview of the event.
 - **Meetings Tab:** Lists meeting(s) for the event.
 - **Contacts Tab:** Key personnel for the event.
 - **Attachments Tab:** Important documents for the event.
 - **Questions Tab:** Lists required question(s) for the event.
 - **Lines Tab:** Displays the line(s) of the event that is to be bid on.
 - **Q And A Forum:** List of questions from bidders and responses from the RTA.
 - **Amendments Tab:** If applicable, list amendments for the event.
12. Click the **Respond Now** button.

13. On the **Event Response** tab, select the checkbox to the left of:

- Select **I confirm that I am authorized to submit bids for my company** to bid on the event.

-OR-

- In the **No Bid Selection** section, select **I do not want to bid on this event** to not bid on the event. If this option is selected a **Reason** is required.

Note: If **I do not want to bid on this event** was selected, select a **Reason** from the drop-down list. Then click the **Next** button. Finally, click the **Submit** button.

14. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

15. On the **Line Responses** tab, click the **Maintain Line Response Details** button.

16. On the **Line Response** tab, enter the line response information.

Field	Value
Vendor Item	Enter the vendor item.
Vendor Item Description	Enter the vendor item description if you see the column listed on the highlighted line. If not, please skip this step.
Quantity	Enter the quantity.
Unit Price	Enter the unit price.
Delivery Date	Enter or select the delivery date.

Note: If you desire to make no bid, click the **Maintain Line Response Detail** button. Under **Enter Line Response Information**, check the **no bid** checkbox, select a **Reason** from the drop-down list, and then click the **Next** button. Review the **Line Response Summary** page and then click the **Finish** button.

17. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

18. On the **Question Responses** tab, enter your response(s) in the answer field to any question(s). Similarly, attach any required document(s) for any question(s).
19. Click the **Next** button.
20. On the **Response Attachments** tab, click the **Create** button to add an attachment.

Field	Value
Title	Enter the attachment title.
File	Select the file to attach.

21. Click the **OK** button.

Note: Please repeat steps #19 - 20 for as many response attachments that apply to your bid. These may include any proposal(s), item specification sheet(s), resume(s), etc. that are relevant for your bid.


22. Click the **Next** button.
23. On the **Submit Response** tab, click the **Submit** button.
24. Click the **Print My Response** button to print your response.

Expected Results:

You have successfully bid on an event.

Step-by-Step Procedure: Supplier Edits a Response to an Event in Supplier Portal




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **My Responses** from the drop-down list.
7. Click the **Responses Open for Award** tab.
8. On the **Responses Open for Award** screen, enter the desired search criteria *if applicable*.
9. Click the **Search** button to view responses where the status in **Event Status** column is **Open**.
10. Double-click to open the response to be modified.
11. Click the **Modify Response** button.
Note: This may also display as **Reinstate Response** button if you previously withdrew your bid.
12. A confirmation message displays, click the **Yes** button to confirm modification of the response.
13. Review the **Event Response**, **Event Line Responses**, **Event Questions**, and **Attachments** tabs and modify as necessary. Click the **Save** button to ensure that all edits are saved.
14. Once you are ready to submit your response, click the **Submit** button.

Expected Results:

You have successfully modified and resubmitted a response.

Step-by-Step Procedure: Supplier Asks Questions on an Open Event in Supplier Portal



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.

NOTE: User name is case-sensitive.


4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **Browse Open Events** from the drop-down list.
7. On the **Open Events** screen, enter the desired search criteria.
8. Click the **Search** button.
9. Highlight the open event to be viewed.
10. Click the **View Event** button.
11. Click the **Ask A Question** button.
12. On the **Ask a Question** screen, enter text in the **Question** field.
13. Click the **Save** button.

Expected Results:

You have successfully submitted a question on an event.

Step-by-Step Procedure: Check Bid Status




1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **My Responses** from the drop-down list.
7. Click the various tab(s) in the Navigation bar to view the current status of your bid(s).

Expected Results:

You have successfully reviewed the bid status on events.

Step-by-Step Procedure: Create a Best and Final Offer



1. The Procurement Team will reach out to the Supplier to submit a best and final offer on an event.
2. Click the [Supplier Portal](#) link to access the system.
3. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
4. Enter the user name in the **User Name** field.

NOTE: User name is case-sensitive.

5. Enter the password in the **Password** field.
6. Click the **Login** button.
7. Select **Events** in the Navigation bar and then select **My Responses** from the drop-down list.
8. Click the **Unsubmitted Best and Final** tab.
9. Highlight the event to be viewed and updated as necessary.
10. Click the **Enter All Best and Final Information** button.

Note: The bid information may be pre-populated. You can edit this information as desired.

11. On the **Event Response** tab, select the checkbox to the left of:
 - Select **I accept the terms and conditions for this event and confirm that I am authorized to accept these terms and conditions and submit bids for my company** if you want to bid on the event. Additional information will be required.

-OR-

 - Select **I do not want to bid on this event** if you do NOT want to bid on the event. If this option is selected a **Reason** is required.
12. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

13. On the **Best and Final Line Responses** tab, click the **Maintain Line Response Details** button.

14. On the **Event Line Response** screen, review and update the information as desired.

15. Click the **OK** button.

16. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

17. On the **Response Attachments** tab, review and update the attachment as desired.

18. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

19. On the **Submit Response** tab, click the **Submit** button.

20. Click the **Print My Response** button to print your response.

Expected Results:


You have successfully submitted a best and final offer on an event.

Step-by-Step Procedure: Create a Two-Step Bidding Offer – Technical and Pricing Separately



The RTA may request a two-step bidding event. There are two categories: one where technical and pricing are submitted at the same time and the second is where technical and pricing are submitted at separate times.

This section should be used if technical and pricing are to be separate. Submitting a proposal section covers how to enter a bid if technical and pricing are to be submitted at the same time.

1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Events** in the Navigation bar and then select **Browse Open Events** from the drop-down list.
7. On the **Open Events** screen, enter the desired search criteria *if applicable*.
8. Click the **Search** button.
9. Highlight the open event to be viewed.
10. Click the **View Event** button.
11. Review the **Event Summary** screen click the **Respond Now** button.
12. On the **Event Response** tab, select the checkbox to the left of:
 - Select **I accept the terms and conditions for this event and confirm that I am authorized to accept these terms and conditions and submit bids for my company** if you want to bid on the event. Additional information will be required.

-OR-

- Select **I do not want to bid on this event** if you do NOT want to bid on the event. If this option is selected a **Reason** is required.

Note: If you do not want to submit a bid then select the **I do not want to bid on this event** checkbox on the **Event Response** tab. Select a **Reason** from the drop-down list. Then click the **Next** button. Click the **Submit** button.

13. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

14. On the **Question Responses** tab, enter your response(s) in the answer field to any question(s). Similarly, attach any required document(s) for any question(s).

15. Click the **Next** button.

16. On the **Response Attachments** tab, click the **Create** button to add an attachment.

Field	Value
Title	Enter the attachment title.
File	Select the file to attach.

17. Click the **OK** button.

Note: Please repeat steps #16 - 17 for as many response attachments that apply to your bid. These may include any proposal(s), item specification sheet(s), resume(s), etc. that are relevant for your bid.


18. Click the **Next** button.

19. On the **Submit Response** tab, click the **Submit** button to submit your bid for strictly the technical proposal section.

20. Click the **Print My Response** button to print your response.

21. You will receive a notification from the RTA regarding submitting the pricing portion for the two-step bid.

22. Click the [Supplier Portal](#) link to access the system.

23. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
24. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
25. Enter the password in the **Password** field.
26. Click the **Login** button.
27. Select **Events** in the Navigation bar and then select **My Responses** from the drop-down list.
28. Click the **Unsubmitted Pricing** tab.
29. Highlight the event to be viewed and updated as necessary.
30. Click the **Enter Pricing** button.
31. On the **Line Responses** tab, enter the line response information.

Field	Value
Item	Enter the item <i>if applicable</i> .
Vendor Item	Enter the vendor item.
Vendor Item Description	Enter the vendor item description if you see the column listed on the highlighted line. If not, please skip this step.
Response Quantity	Enter the quantity.
Unit Price	Enter the unit price.
Delivery Date	Enter or select the delivery date <i>if applicable</i> .

Note: If you desire to make no bid, click the **Maintain Line Response Detail** button. Under **Enter Line Response Information**, check the **no bid** checkbox, select a **Reason** from the drop-down list, and then click the **Next** button. Review the **Line Response Summary** page and then click the **Finish** button.

32. Click the **Next** button.

Note: Clicking the **Next** button saves the information on the screen when navigating between displayed tabs.

33. On the **Submit Response** tab, click the **Submit** button.

34. Click the **Print My Response** button to print your response.

Expected Results:

You have successfully submitted a two-step bidding offer for an event.

Managing Invoices


Using Invoices, suppliers can view open, paid, and overdue invoices. Suppliers can also view any invoices with errors and submit their own invoices directly from the portal.

Invoices cannot be submitted against any PO or Service Contract that has not been released, is not active, or in amendment status.

This process covers the steps performed by a Supplier to submit and view an invoice.

Step-by-Step Procedure: Supplier Submits an Invoice via the Supplier Portal



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Create Invoices** from the **Order Management** drop-down list in the Navigation bar.
7. On the **Create Invoice** screen, select one of the two invoice options:
 - **PO Match**
 - **Service Contract**

Note: The **Expense** option should never be selected. This is for RTA internal use only.

8. The **Create Invoice** screen displays. Complete the following fields:

Field	Value
Company	Field will default.
Invoice Number	Enter the invoice number.
Service Contract or Purchase Order	Enter or select the service contract or purchase order.
Select To Create Details For All Open Contract or Purchase Order Lines	Select the checkbox.
Description	Enter the description.
Invoice Date	Enter or select the invoice date.
Due Date	Enter or select the due date.
Invoice Amount	Enter the invoice amount.
Invoice Image	Attach a scanned copy of the invoice.
Proof of Delivery	Attach a scanned proof of delivery document.


9. Click the **Next** button.
10. The **Purchase Order Line Information** or **Service Contract Line Information** tab displays. Ensure the **Total Functional Amount** is equal to your invoice amount. This may require you to edit unit cost.
11. Click the **Next** button.
12. Click the **Submit** button.

Expected Results:

You have successfully submitted an invoice via the supplier portal.

Step-by-Step Procedure: View Invoice List



1. Click the [Supplier Portal](#) link to access the system.
2. From the **Supplier Portal** landing page, click the  icon in the upper right corner of the screen and then select **Sign in** from the drop-down list.
3. Enter the user name in the **User Name** field.
NOTE: User name is case-sensitive.
4. Enter the password in the **Password** field.
5. Click the **Login** button.
6. Select **Invoices** from the **Order Management** drop-down list in the Navigation bar.
7. The **All Invoices** screen displays.
8. Click the **All**, **Open**, **Paid**, **Exceptions**, and **Overdue** tabs to view various invoices.

Expected Results:

You have successfully viewed the invoice list.

Topic Recap



Having completed this course, you should be familiar with the following processes:

- ◆ Log On/Log Off the Supplier Portal
- ◆ Register a Customer as a Supplier
- ◆ Update the Supplier Account
- ◆ Respond to Bid Opportunities
- ◆ Check Bid Status
- ◆ Create a Best and Final Offer
- ◆ Submit an Invoice
- ◆ View Invoice List