

# Supplier Portal Invoice Submission and Subcontractor Payment Reporting Participant Guide

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**Note:** Contents may change without notice.



# Outline of Topics

This guide will help you become familiar with the following processes:

- Contractor Submitting an Invoice
- Contractor Reporting Subcontractor Payment - only applicable for Service Contracts and not purchase orders.



# Supplier Portal Management


## Using the Supplier Portal: Contractor Submit an Invoice

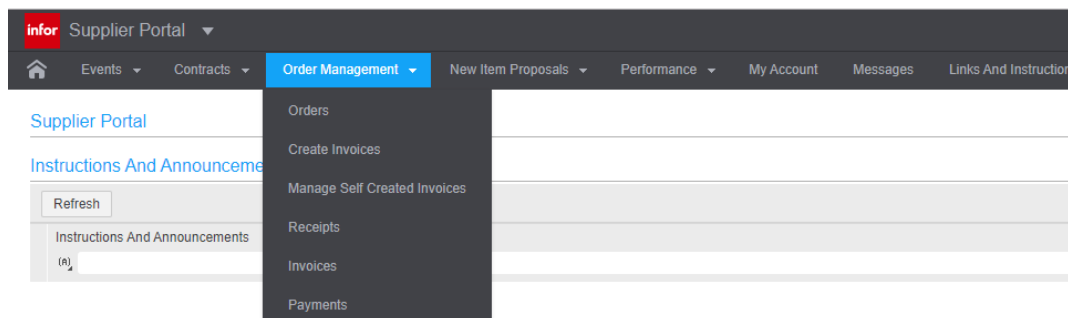
The Supplier Portal allows suppliers to access the RTA's procurement system through a browser. It is recommended that Suppliers use Google Chrome.

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

This process covers the steps performed by a Supplier to submit an invoice and report subcontractor payment using the RTA Supplier Portal.

### Step by Step Guide for Submitting Invoice for Contractor

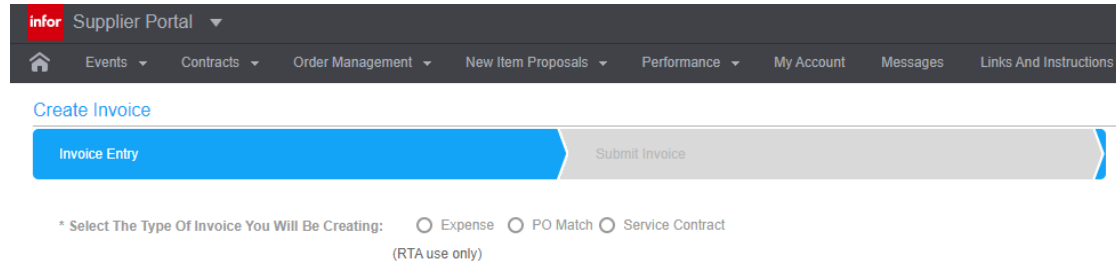
1. Click the Supplier Portal Link to access the system <http://rtachicago.org/supplierportal>
2. From the **Supplier Portal** home page, click on the following icon  found in the upper-right corner of the screen and then select **Sign In** from the dropdown list.
3. Enter the username in the **Username** field.  
**Note:** Username 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 Invoices screen, select one of the two invoice options:

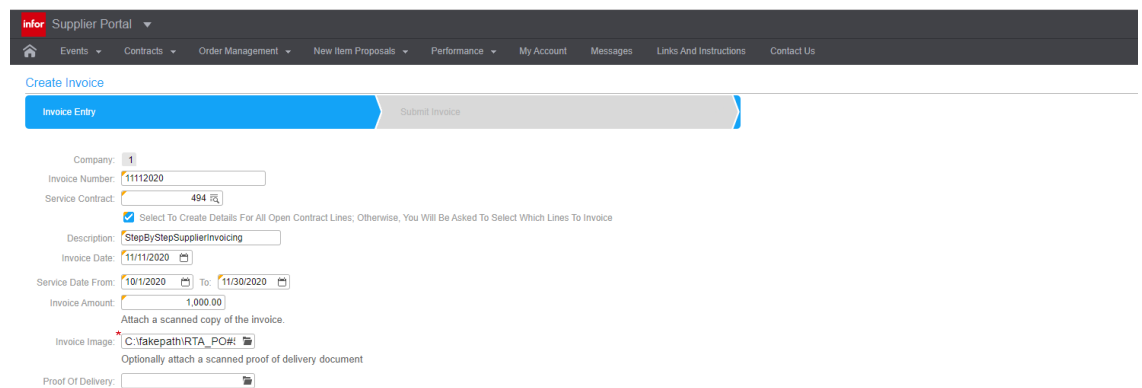
- a. **PO Match**
- b. **Service Contract – Service Contract is Selected for Purposes of this Guide**

**Note:** The Expense option is for RTA internal use only.



8. The **Create Invoice** screen displays. Provide information in the following fields:

- a. **Company:** This field will auto-default.
- b. **Invoice Number:** Enter in the name or number of the invoice being submitted.
- c. **Service Contract:** Click on the magnifying glass and select the Service Contract (or Purchase Order) number being invoiced against.
  - i. *You may click on the checkbox for “Select To Create Details For All Open Contract Lines; Otherwise, You Will Be Asked To Select Which Lines To Invoice” button if you wish to invoice against all lines of a Service Contract or Purchase Order.*
- d. **Description:** Enter in a brief description of the invoice.
- e. **Invoice Date:** Enter in or select the date the invoice is being submitted on.
- f. **Service Date From:** Enter in or select the beginning date the invoice is covering.
- g. **To:** Enter in or select the final date the invoice is covering.
- h. **Invoice Amount:** Enter in the monetary amount of the invoice.
- i. **Invoice Image:** Attach a scanned copy of the invoice.
- j. **Proof of Delivery:** Optionally attach a scanned proof of delivery document.



9. Click Next



10. Under the **Service Contract Information Tab** enter the amount you are requesting to be invoiced in the **Enter Invoice Detail** Field and click **Save**.

**Note #1:** There may be multiple lines, so please ensure amounts are entered correctly against the various lines.

**Note #2:** The “Invoice Amount” on the *Invoice Entry* tab must be equal to the bolded “Total Distribution Amount” found on this tab.

Create Invoice

Invoice Entry  Service Contract Information  Submit Invoice

Contract Lines

Save Delete Open Search

Contract Line	Item Number	Description	UOM	Service Code	Amount Remaining	Quantity Remaining	Quantity	Enter Invoice Detail	Limit Cost	Total
1		Line 1	EA	Amount	2,000.00		1,000		500.00	
<b>Total</b>										

11. Click **Next**

12. Under the **Submit Invoice** tab, review the information to ensure that it is correct. After reviewing, click **Submit**. **Note #1:** The “Invoice Amount” on the *Invoice Entry* tab must be equal to the bolded “Total Distribution Amount” found on this tab.

Create Invoice

Invoice Entry  Service Contract Information  Submit Invoice

Submit Invoice

Company: 1 RTA Payables Company

Invoice Number: 111112020

Invoice Amount: 1,000.00

Total Detail Amount: 1,000.00

Click the Submit button to submit this Invoice immediately.

Click the link below to view the invoice

[View Invoice](#)

The invoice can also be viewed any time in manage self created invoices



## Using the Supplier Portal: Contractor Reports Subcontractor Payment

**THIS NEXT SECTION IS FOR REPORTING SUBCONTRACTOR PAYMENTS** only applicable for Service Contracts and not purchase orders.

13. Click the Contracts Drop Down Box and select My Contracts.

The screenshot shows the Infor Supplier Portal interface. The 'Contracts' dropdown menu is open, displaying options: My Contracts, My Terms Negotiation, Create A Proposed Contract, My Proposed Contracts, All Contracts For My Supplier, and Subcontractors. The 'My Contracts' option is highlighted. Below the menu, a progress bar indicates the current step is 'Service Contract Information', with a green checkmark. A 'Submit Invoice' button is visible on the right.

14. Select **View Subcontractors**

The screenshot shows the 'My Active Contracts (1)' screen. It includes search fields for Contract, Working Contract ID, Name, Primary Contact, Effective Date, and Expiration Date. Below the search fields are buttons for 'View Details', 'Print Contract No Lines', 'Print Contract With Lines', 'Attachments', 'Email Primary Contact', and 'View Subcontractors'. The 'View Subcontractors' button is highlighted in yellow. A table below shows one active contract:

Contract	Name	Primary Contact
494	SBS Invoice 11/10/2020	Ademola Faleti

15. Under the **Subcontractors for Contracts** screen select **Update**

The screenshot shows the 'Subcontractors For Contract 494' screen. It includes a 'Refresh' button and contract details: Contract Name: SBS Invoice 11/10/2020, Proposed Total Amount: 8,000.00. Below this is a table of subcontractors with columns: Name, Commodity Code, Committed Amount, Committed Percent, Total Amount Paid, and Total. The 'Update' button is highlighted in blue.

Name	Commodity Code	Committed Amount	Committed Percent	Total Amount Paid	Total
SBSSubContractor		2,400.00	30.000 %	100.00	
<b>Total</b>		<b>2,400.00</b>	<b>30.000 %</b>	<b>100.00</b>	

16. In the **Contract Subcontractor** screen select **Add**

Contract Subcontractor

Save

Contract: 494 SBS Invoice 11/10/2020  
Subcontractor: SBSSubContractor  
Proposed Total Contract Amount: 8,000.00  
Commodity Code:   
 Lien Release Required  Lien Release Completed  
Enter Committed Amount:  - Or - Committed Percent:  30.000 %  
Committed Amount: 2,400.00 Committed Percent: 30.000 % Total Paid: 100.00 4.167 % Remaining: 2,300.00 95.833 %

Subcontractor Payments

Payment Number	Payment Date
11112020	11/11/2020

Records Per Page: 10

17. On the **Contract Subcontractor Payment** screen complete the following fields to report payment to subcontractor. Then Click **Save**.

- Payment Number:** Must match the invoice number that was submitted for Contractor payment.
- Payment Date:** Enter the date of invoice.
- Payment Amount:** Enter amount paid to subcontractor.
- File:** Select and attach the proof of payment to subcontractor.

infor Supplier Portal

Events Contracts Order Management New Item Proposals Performance My Account Messages Links And Instructions Contact Us

Contract Subcontractor Payment

Save

Contract: 494 SBS Invoice 11/10/2020  
Subcontractor: SBSSubContractor  
Payment Number: 11112020  
Payment Date: 11/11/2020  
Payment Amount: 100.00

Proof Of Payment Attachment

Title: RTA\_PO#521\_20200527v3.pdf  
File: C:\fakepath\RTA\_PO#

18. Click the Back-browser button. Your invoice should appear in the **Contract Subcontractor** screen. This completes your subcontractor payment reporting.