London Borough of Havering Supplier Portal Guide

The purpose of this guide is to provide the Councils suppliers with an easy to use guide on how to manage purchase orders, create invoices and credit notes by using the supplier Portal.

The guide is in sections for ease of navigation

There is a separate guide for tendering and supplier management.

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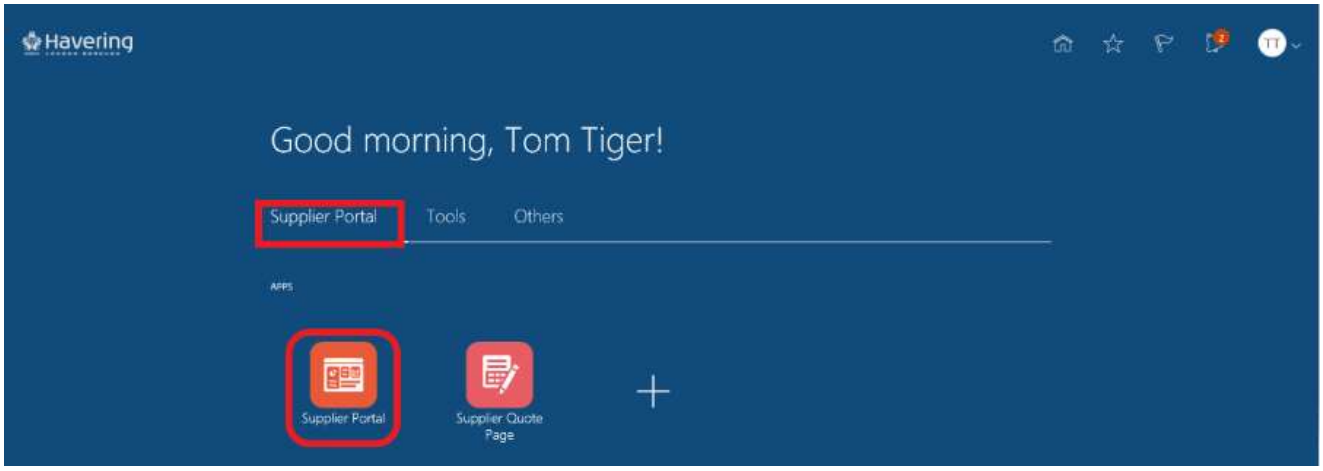
Section 1

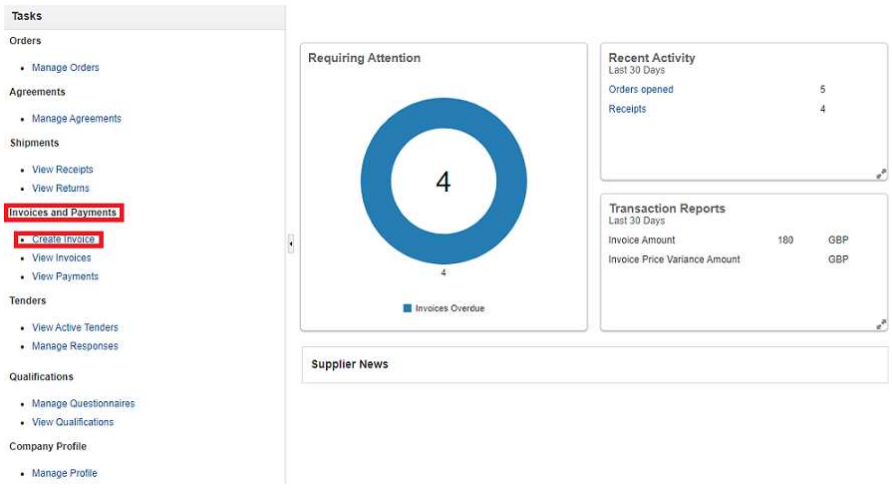
How to Submit an Invoice.

This section provides a step by step description on how to create and submit an invoice via the Supplier Portal.

From the landing page select Supplier Portal click the Supplier Portal App.

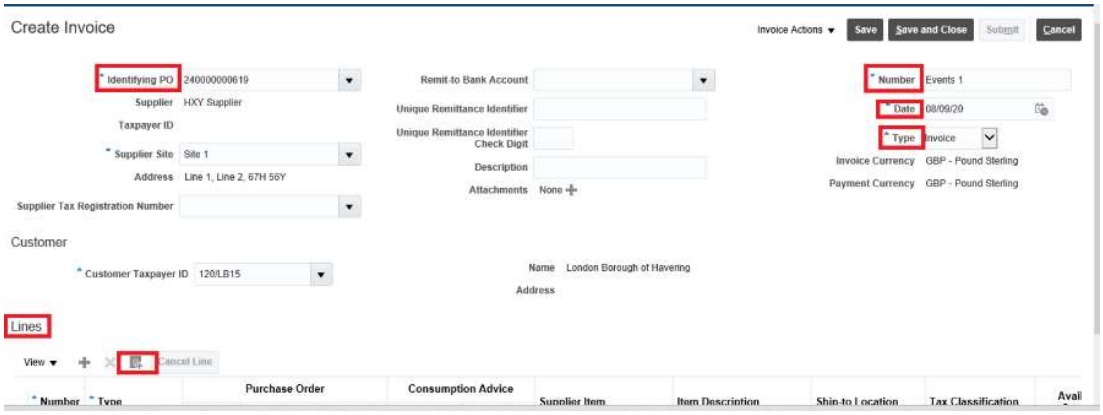


Under the task bar > Invoices and Payments > select Create Invoice.

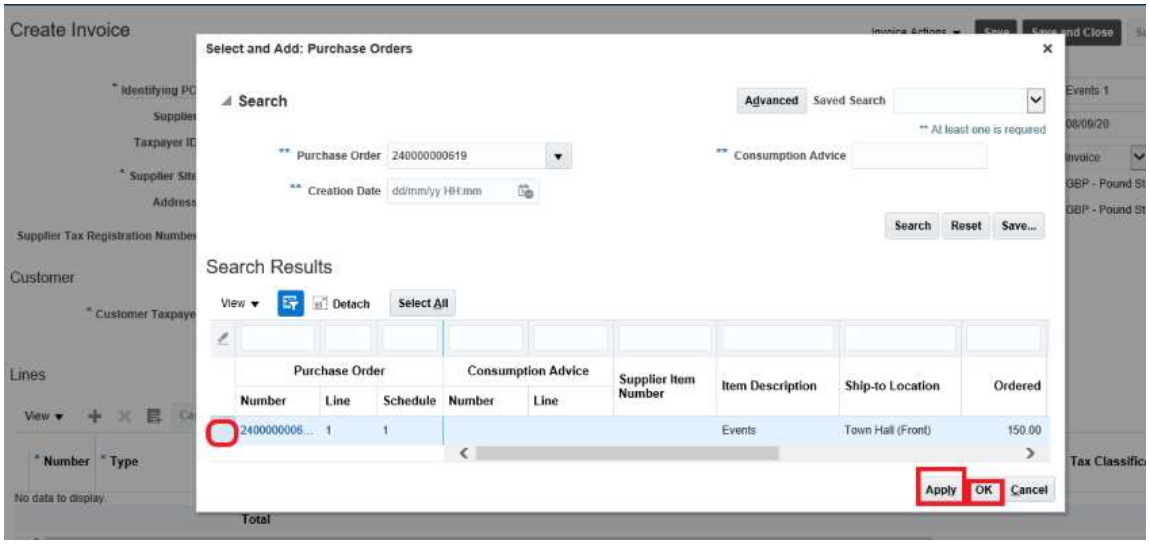


To create the invoice

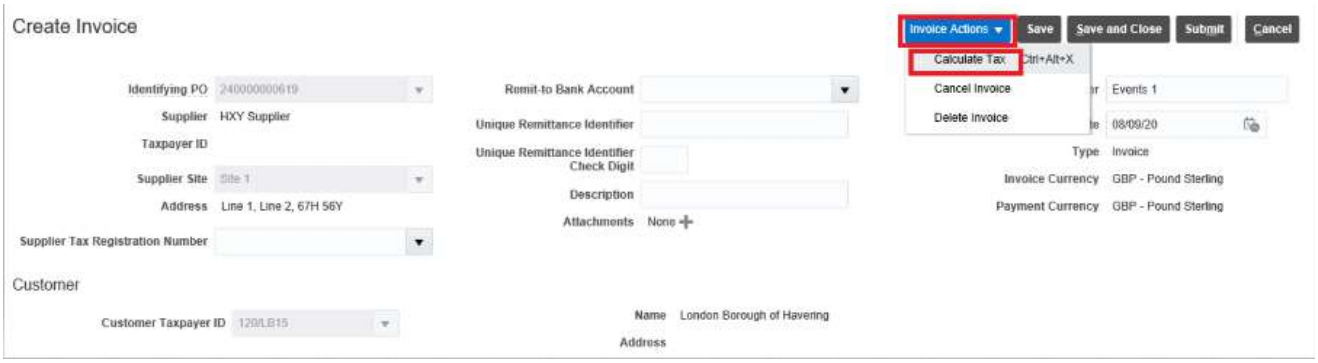
- Either add the PO number you wish to invoice or locate this via the drop down, please note that an invoice can only be submitted if the PO has not already been fully invoiced.
- Add your invoice number.
- Select the invoice date.
- Attach a copy of the invoice if requested, typically this will not be required.



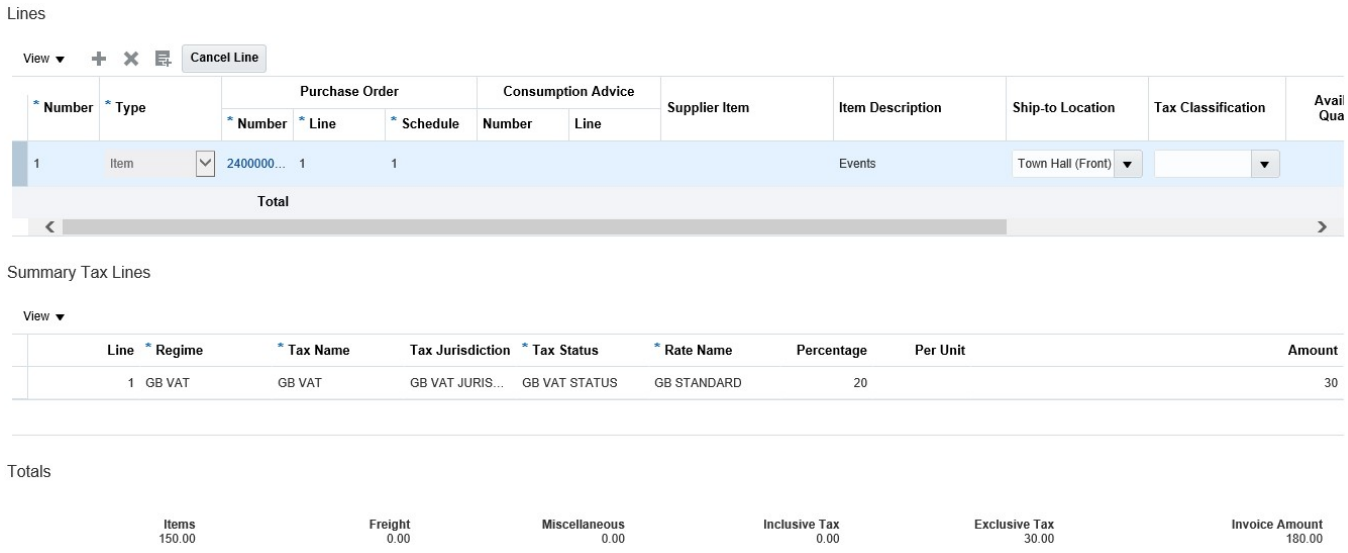
Under lines click on the select and add icon, this will retrieve the purchase order.



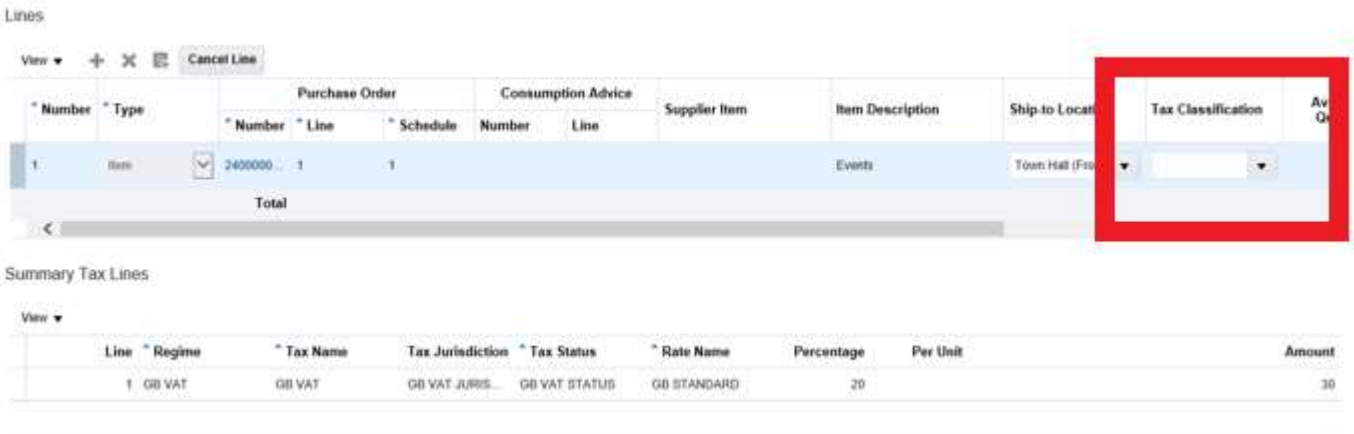
Highlight the line by clicking in the box on the left of the PO number, click Apply, click Ok, this will add the purchase order to the invoice, and you can vary the invoice amount but cannot exceed the value of the purchase order.



Click on invoice actions and select Calculate Tax, this will calculate the applicable tax to the invoice.



If you are VAT exempt, once you have added the line go along to Tax Classification and from the drop down box click GB Exempt, Save and Submit.



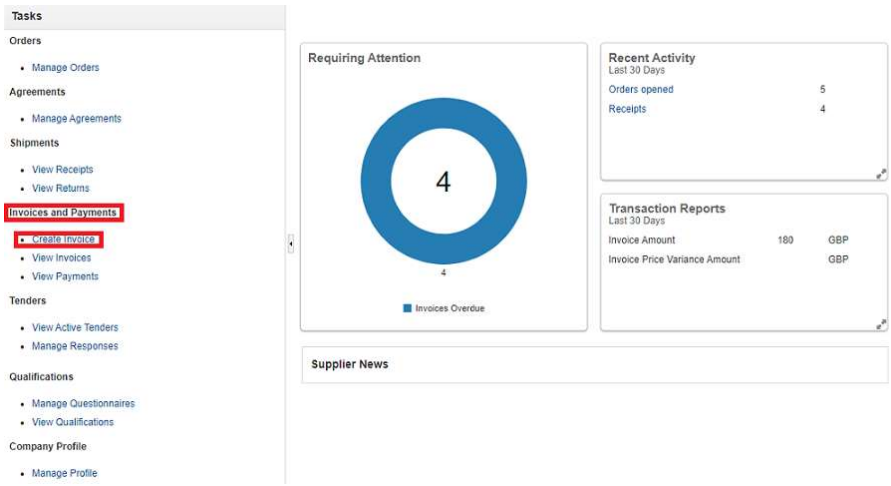
Click submit to submit the invoice.

Section 2

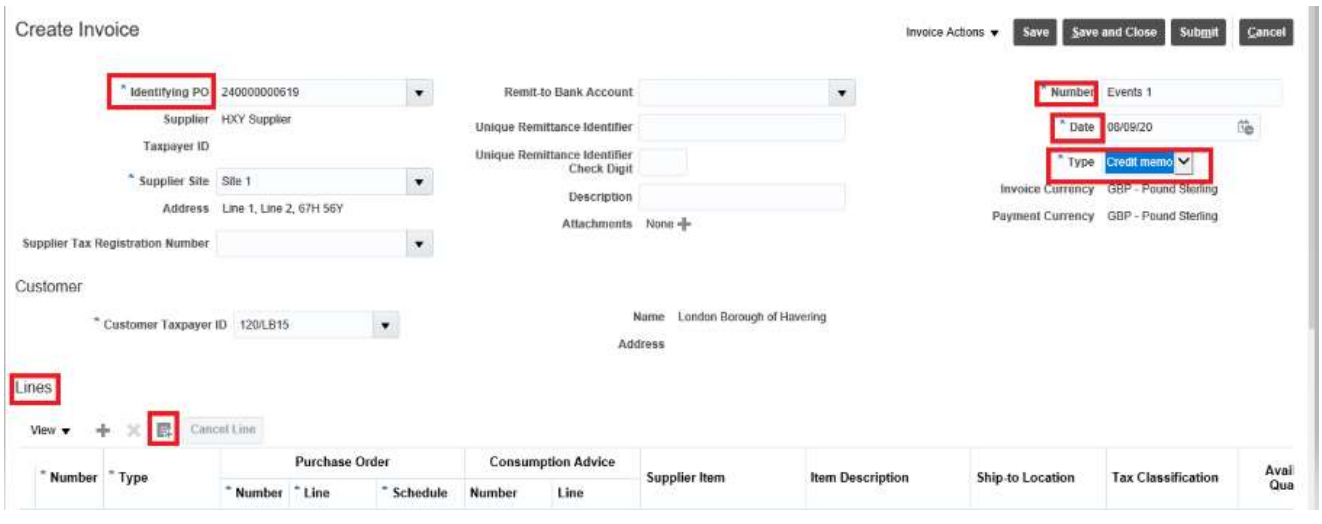
How to Submit a Credit Note

This section provides a step by step description on how to create and submit a credit note via the Supplier Portal.

From the landing page navigate to the supplier portal.



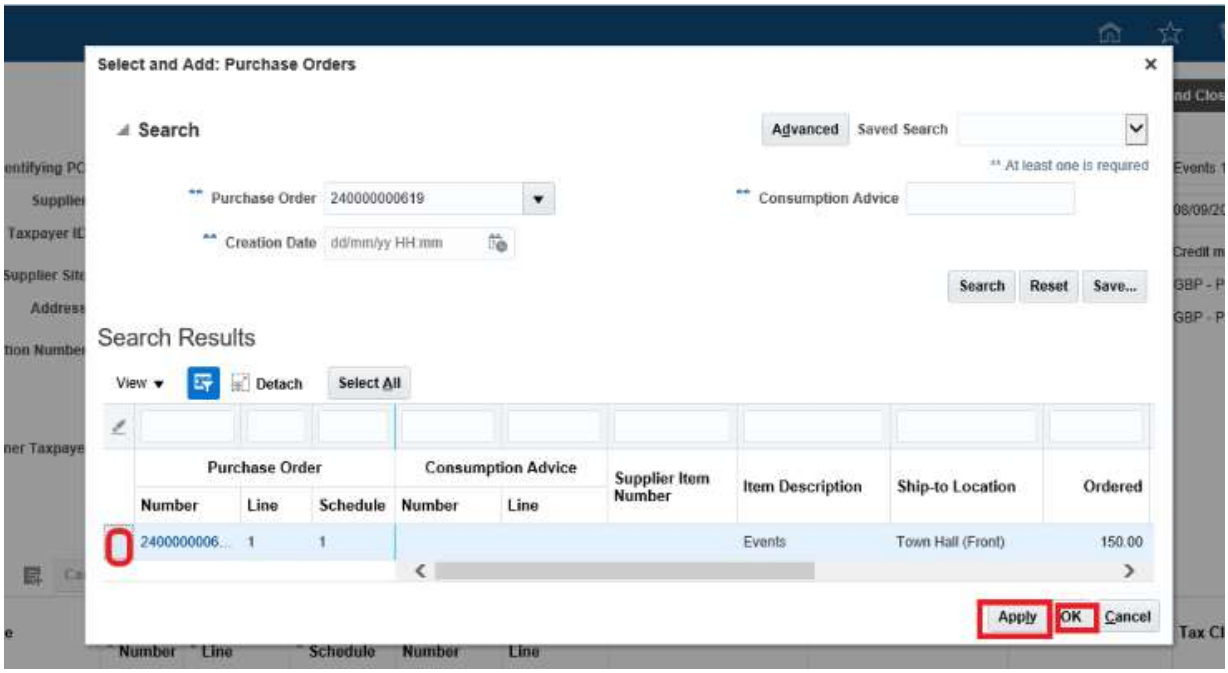
Under the task bar > Invoices and Payments > select Create an invoice.



Amend the type to credit memo, note the system will always default to invoice

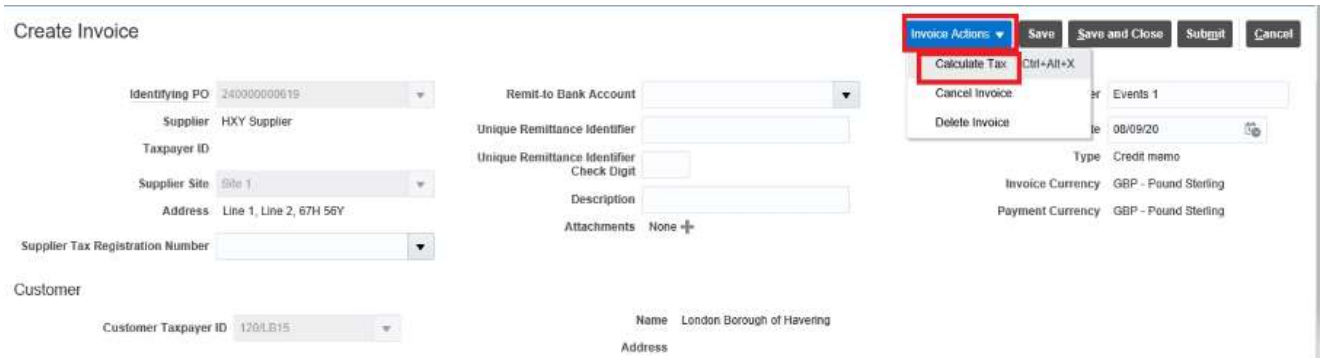
- Either add the PO number you wish to credit or locate this via the drop down.
- Add your credit note number.
- Select the date for the credit note, typically the date created.
- Attach a copy of the credit note if requested, typically this will not be required.

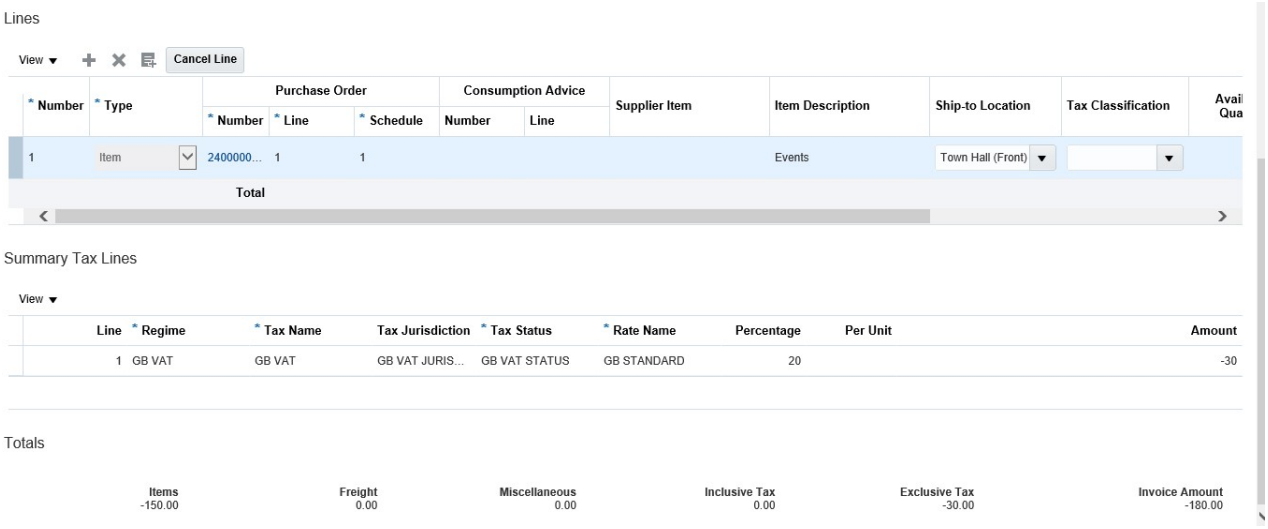
Under lines click on the select and add icon, this will retrieve the purchase order.



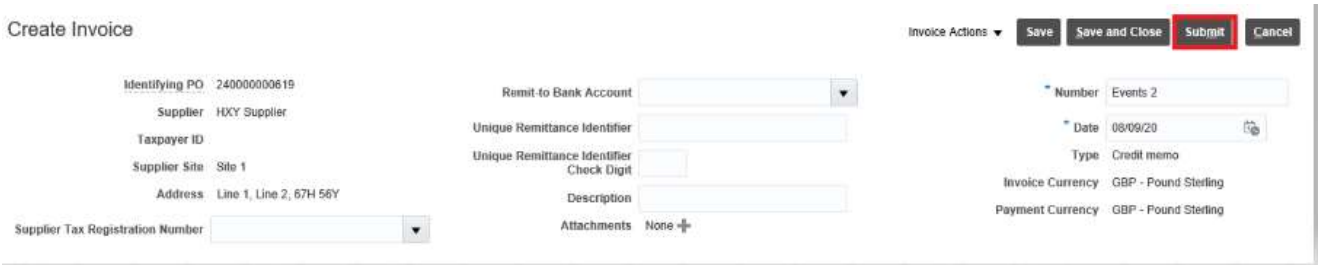
Highlight the line by clicking in the box on the left of the PO number, click Apply and then Ok.

The Purchase order line will be added to the credit note, *note* - you can update the value of the credit note but this cannot be greater the value of the PO.





The applicable tax is added to the invoice.



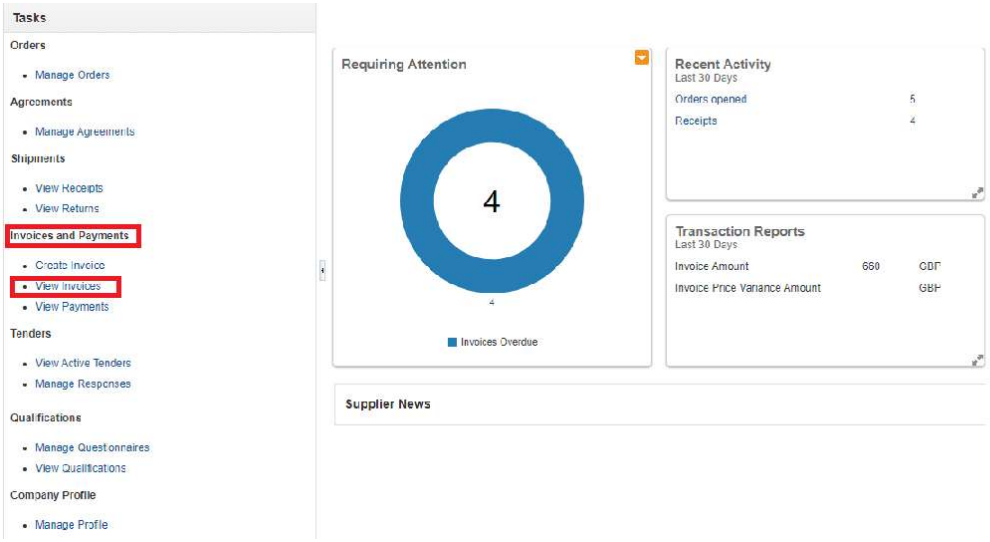
Click submit to submit the invoice.

Section 3

How to View Supplier Invoices

This section describes how a supplier can view invoices submitted to the Council.

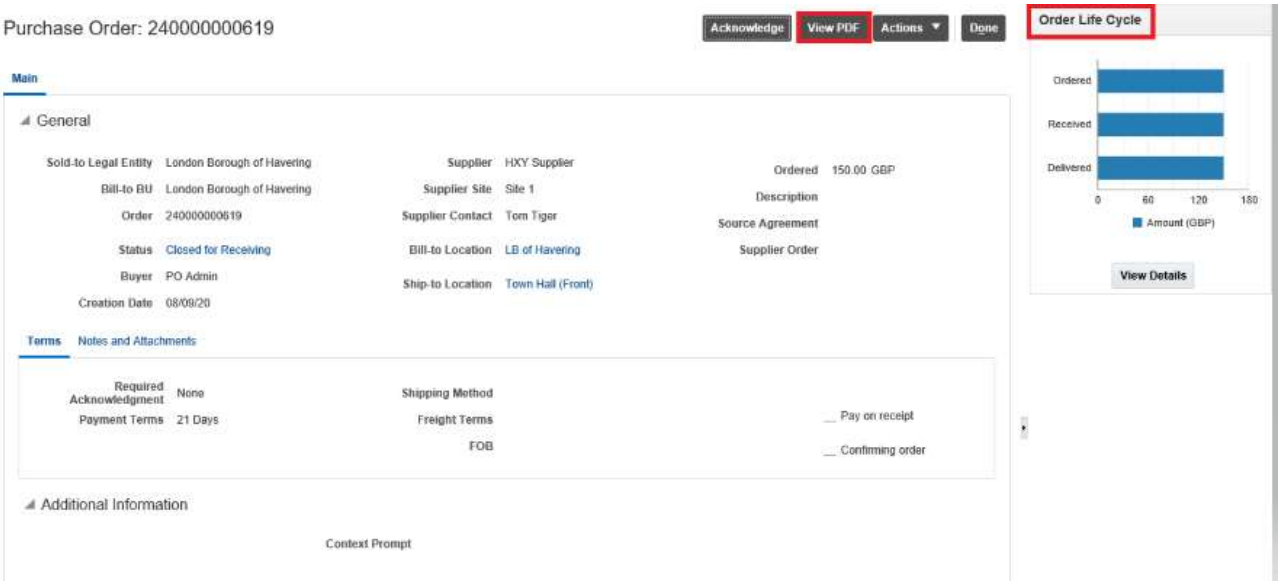
From the landing page navigate to the supplier portal.



Under the task bar > Invoices and Payments > select View Invoices.

Click on the supplier drop down to locate the suppliers and search, this will open details on all invoices submitted by the supplier to the Council.

By clicking on the PO number suppliers can review details of the PO.



Suppliers can view a copy of the PO by clicking on the view PDF icon.

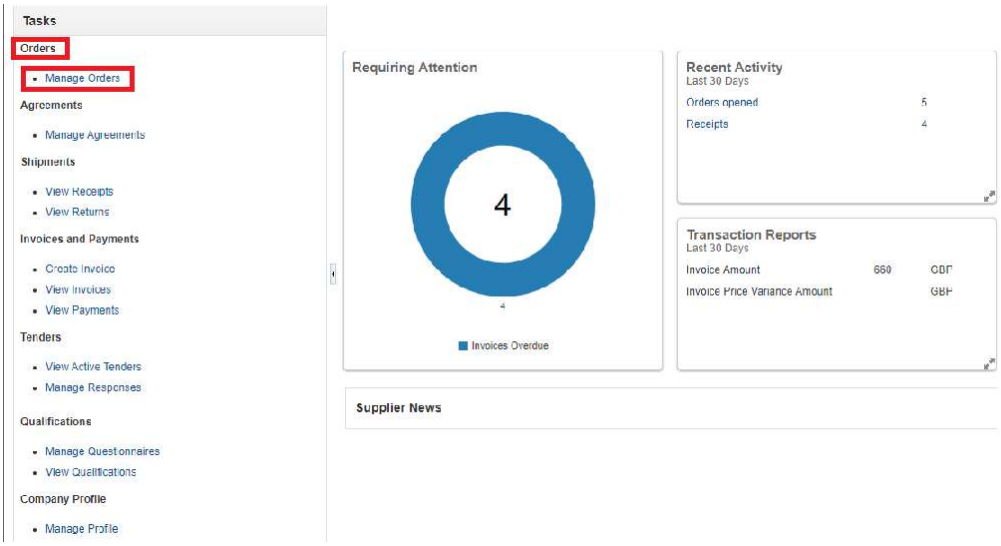
Order Life Cycle shows the status of the PO (the example shown shows that the PO has been receipted and invoice paid).

Section 4

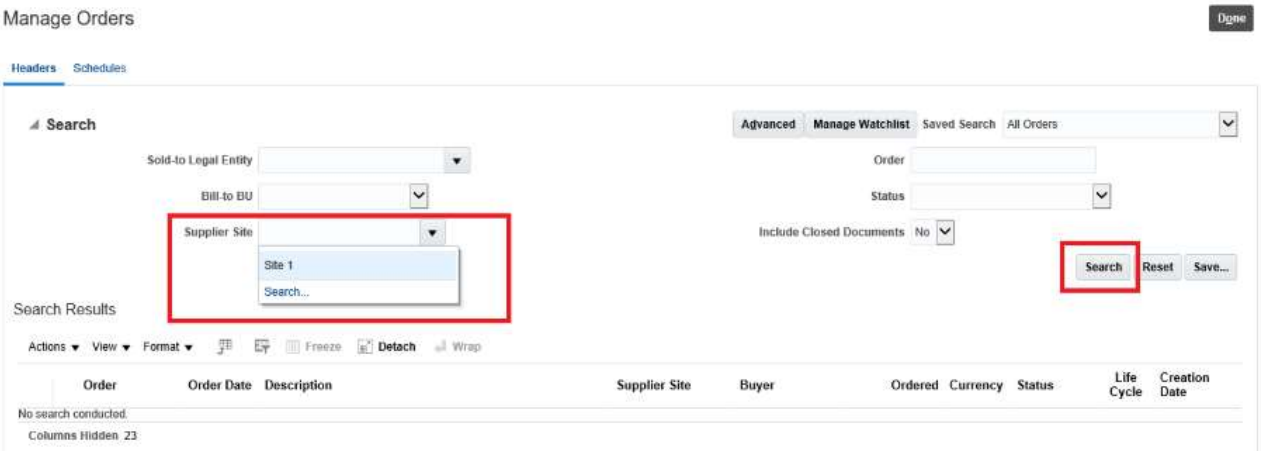
How to view and Manage Orders

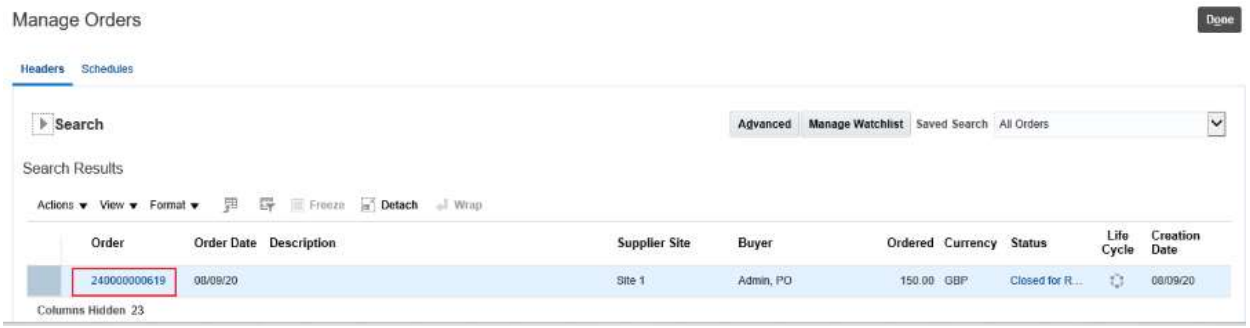
This section describes how a supplier can view invoices submitted to the Council.

From the landing page navigate to the supplier portal

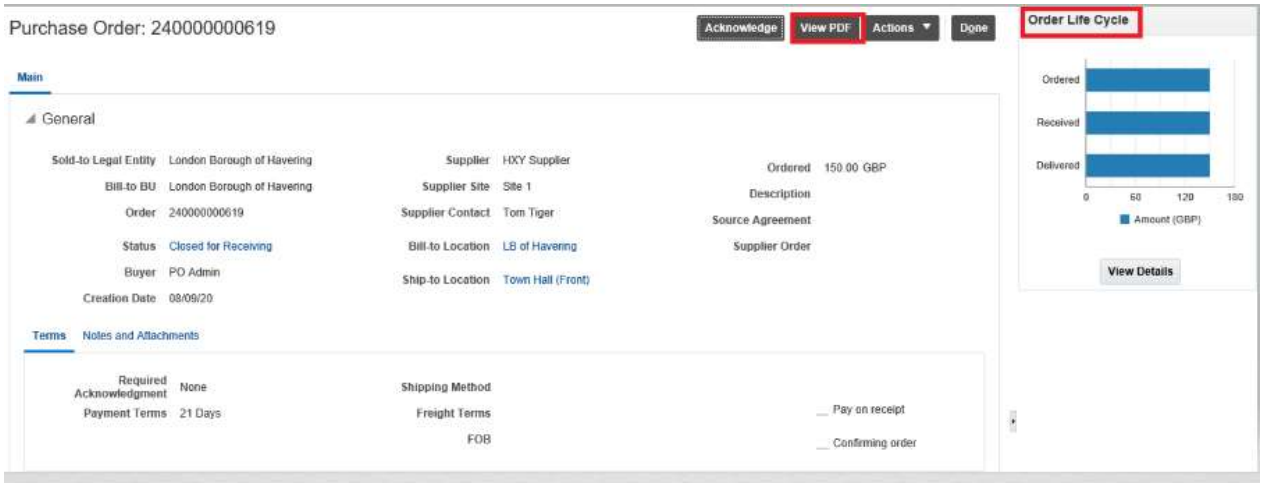


Under the task bar > Orders > select Manage Orders, on the next screen identify the supplier via the drop down and click search, this will open all details of all open orders





Click on the order number to view details of the order



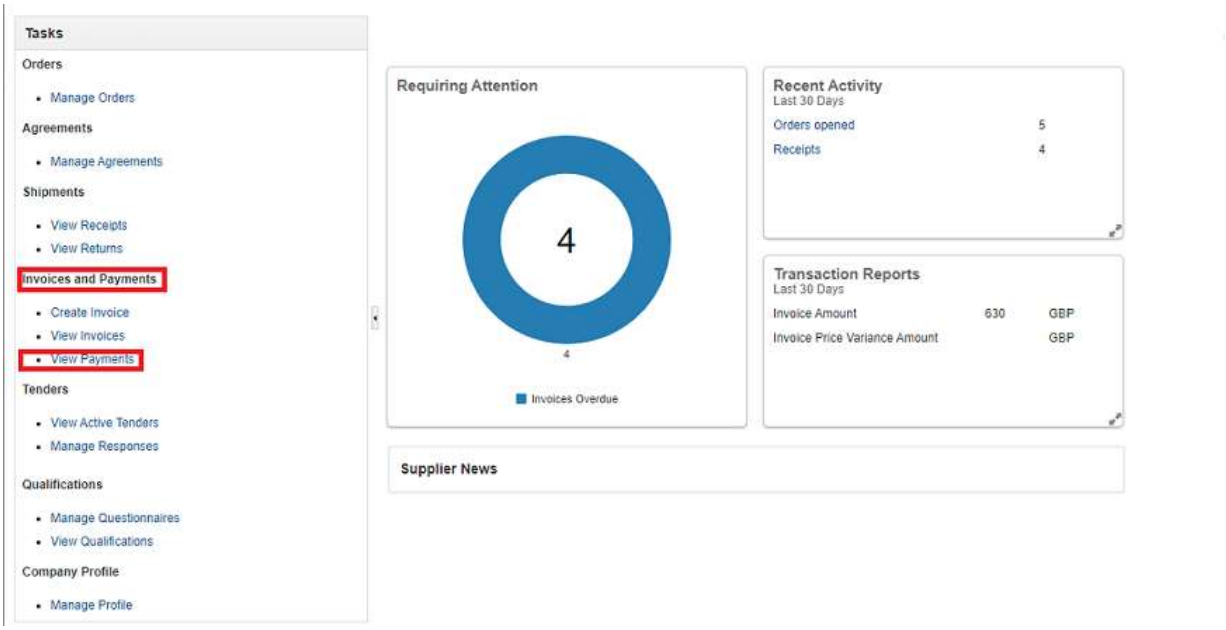
Suppliers can view a copy of the PO by clicking on the view PDF icon.

Section 5

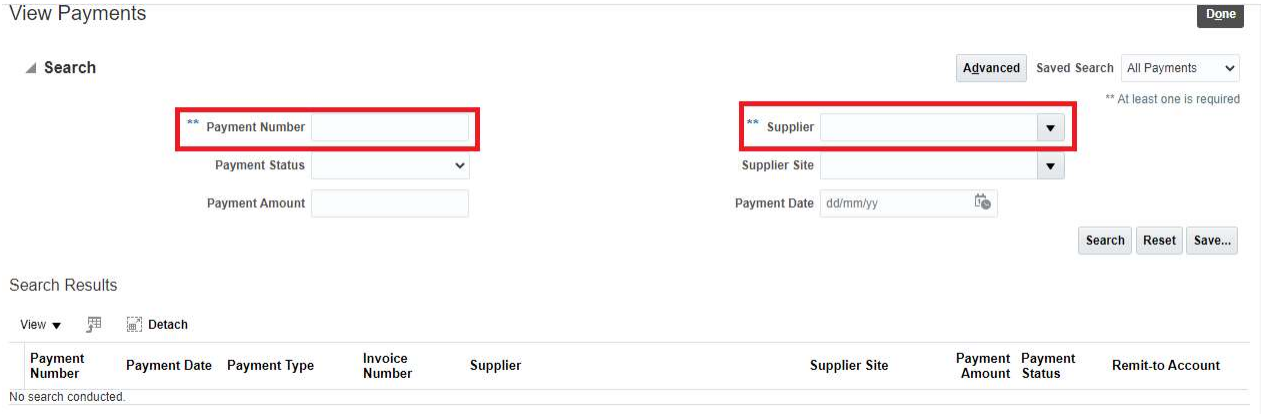
How to View Payments made by the Council

This section describes how to view payments made by the Council.

From the landing page navigate to the supplier portal.



Under task bar > Invoices and Payments > select View Payments



From this page you can search payments made to the supplier by clicking the drop-down

option and selecting the supplier or by adding the payment number.

By selecting one off these options you can view details of the payment, including payment method, payment date and details of invoices paid.