Using Programmed Vendor Portal (Vendor Admin)– User Guide

D365 Project

14 December 2022

Prepared for:

Programmed`s Vendor

Prepared by:

D365 Training Team

VOB – Using Programmed Vendor Portal (Vendor Admin) – User Guide

PROGRAMMED

Purpose:	The purpose of this User Guide is to assist Vendor Administrators in logging into and using the Programmed Vendor Portal.
Overview:	Once a company's pre-qualification has been approved, the Vendor Portal can be used to update and view: • Company Details including any changes to bank details • Company Documents • Work Orders-Please refer to **Using Programmed Vendor Portal To Manage Work Orders - User guide** • Financial Documents which includes **submitting invoices** • Employee Information, including creating employee records and giving them access to the portal so that they can complete their Programmed induction and update any required qualifications or licenses • Subcontractor Handbook If you are a vendor employee or technician, then please refer to the user-guide **below** on: • Accessing the portal as a vendor employee and completing your induction- **Using Programmed Vendor Portal as a Vendor Employee/Technician**
Assistance:	For any assistance, • PMS.Procurement@programmed.com.au • VendorManagement@programmed.com.au – PFM WA Vendors

Contents

1 Accessing the Portal

You will have to log into the Programmed Vendor Portal as Vendor Admin to view and update Company details and documentation and add employees.

The steps below outline how to log into the Programmed Vendor Portal.

⚠ Please ensure that you use a **Google Chrome browser** to log into the portal. Other browsers may not display details/forms in the portal correctly.

1.1 Login for the first time

1. You will receive two (2) emails:

- ✓ **Email 1**: From Programmed with the information about the Programmed Vendor Portal. This email will be from: *pms.procurement@programmed.com.au*
- ✓ **Email 2:** From Microsoft Invitations on behalf of Programmed inviting you to authenticate your login. This email will also provide the link to the Vendor Portal. This email will be from: *invites@microsoft.com*

To create your login credentials, open up the email sent from Microsoft on behalf of Programmed:

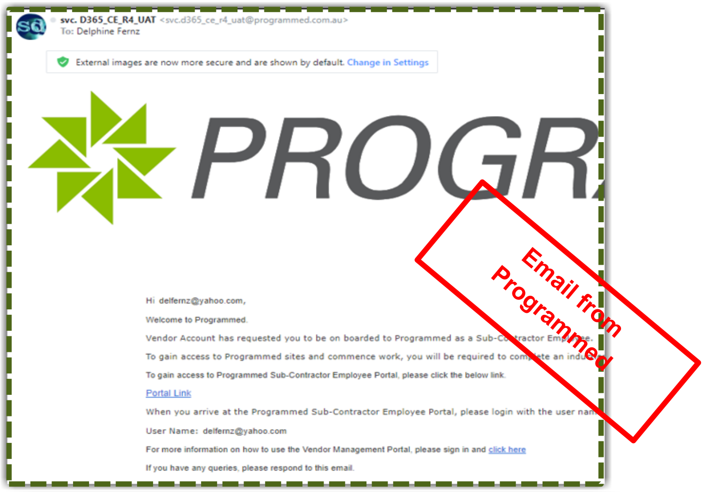
2. Click on **Accept invitation**

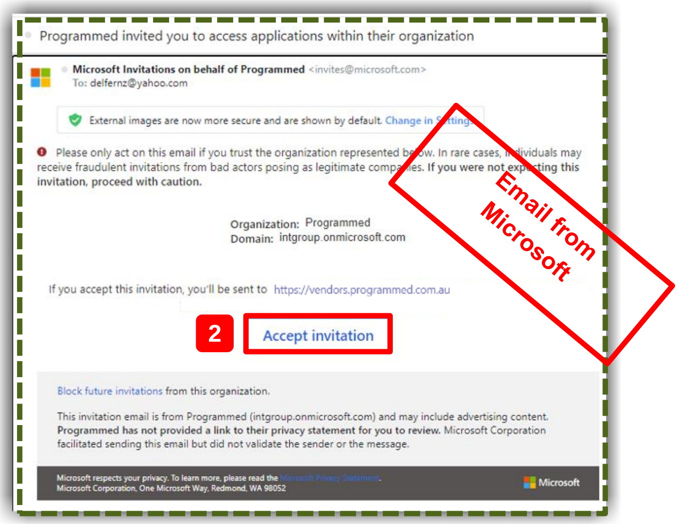
If your email account is associated with any of the following Microsoft accounts then go to section 1.1.2,

- ✓ @Hotmail.com
- ✓ @Live.com
- ✓ @Outlook.com
- ✓ @MSN.com
- ✓ @Microsoft.com

Note: This include all the other variations/domains such as .com.au or .com.nz etc

If not a Microsoft account, then go to section 1.1.1.
If using your organization domain related email account, go to section 1.1.3.



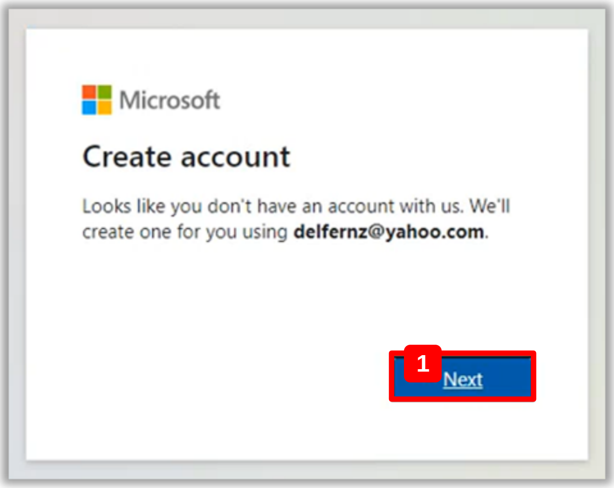


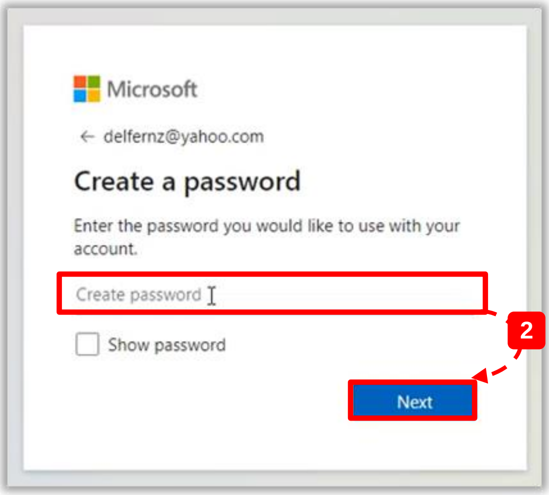
💡 If you haven't received the email, please check your **Junk/Spam** folder in your mailbox. If the issue persists, please contact Programmed to help you.

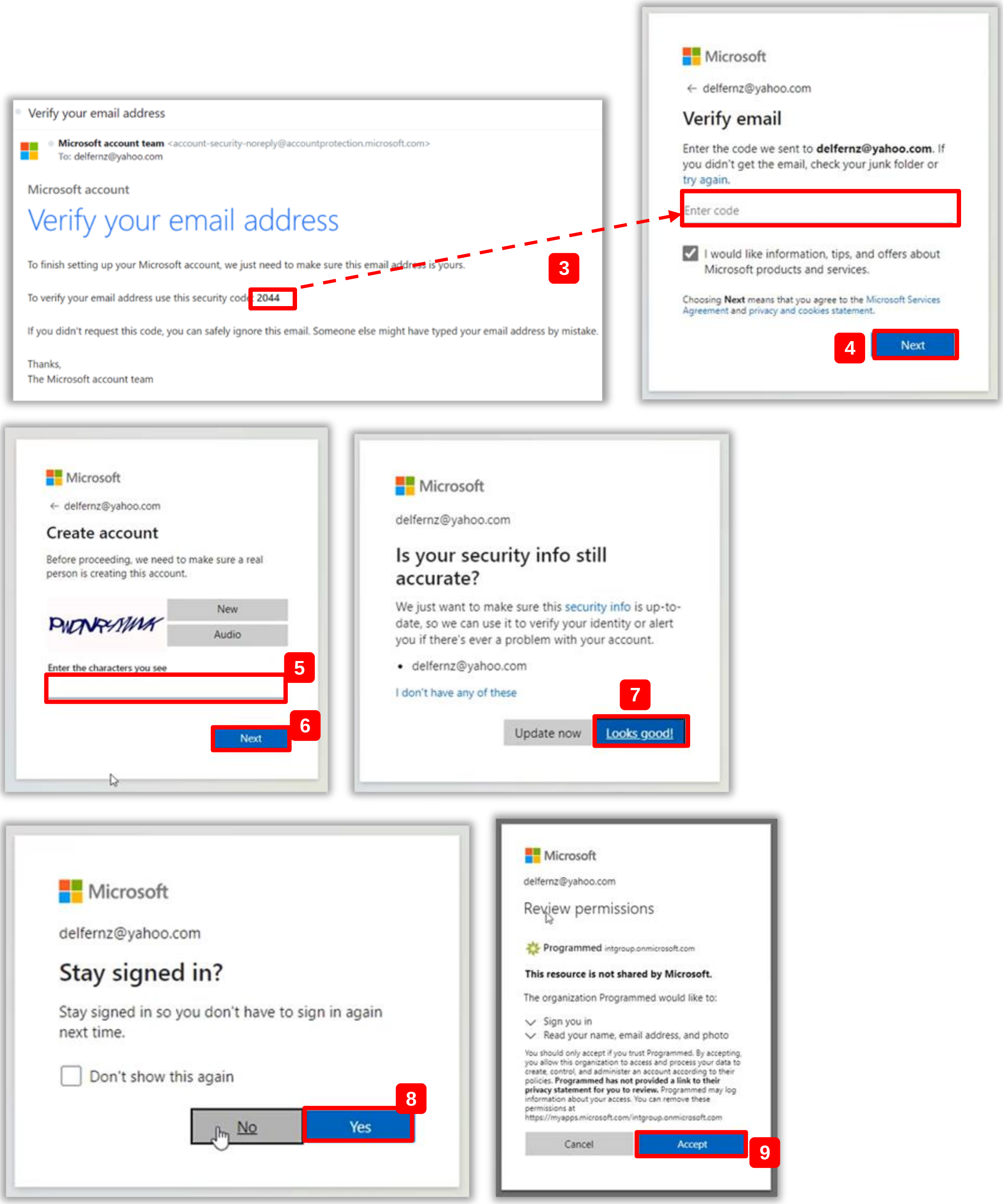
1.1.1 IF YOU HAVE A NON MICROSOFT ACCOUNT

To login to the Programmed Vendor Portal: Click on the Accept invitation button, you have received from Microsoft (*invites@microsoft.com*) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Click **Next** (screen shot 1)
2. Create a new password and click **Next**
3. Microsoft will send a **security code** to your email, that you are using to authenticate. Enter the **Code** to verify your email
4. Click **Next**
5. Enter the characters or follow instructions to complete puzzles as required.
6. Click **Next**
7. Click **Looks good!**
8. Select **Yes** to stay signed in
9. Review the permissions and click **Accept** to proceed





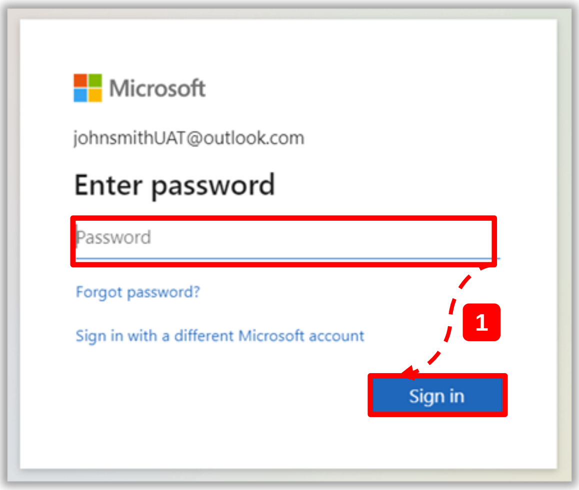


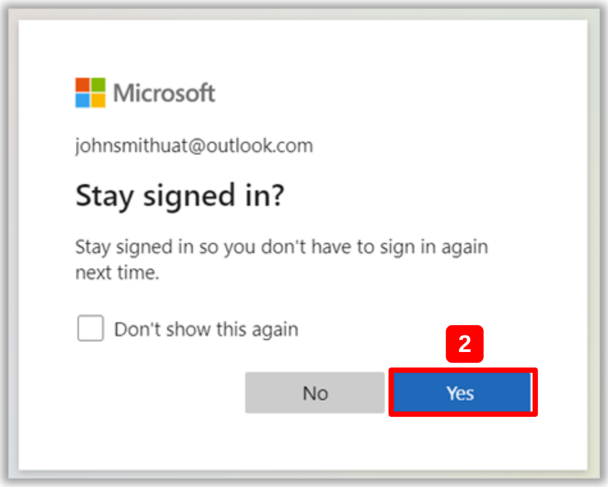
RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

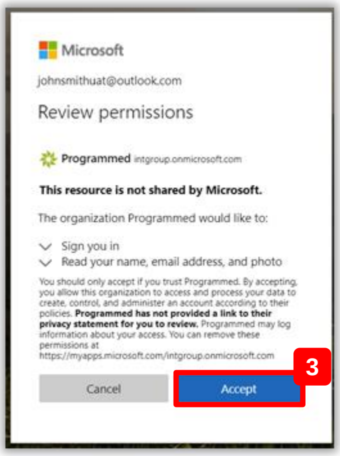
1.1.2 IF YOU HAVE A MICROSOFT ACCOUNT

To login to the Programmed Vendor Portal: Click on the **Accept invitation** button, you have received from Microsoft (*invites@microsoft.com*) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Enter the password relating to your email account and click **Sign in**
2. Click **Yes**
3. Review the permissions and click **Accept** to proceed





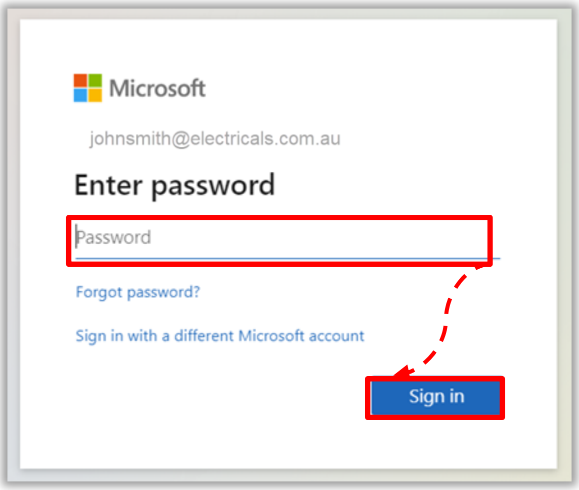


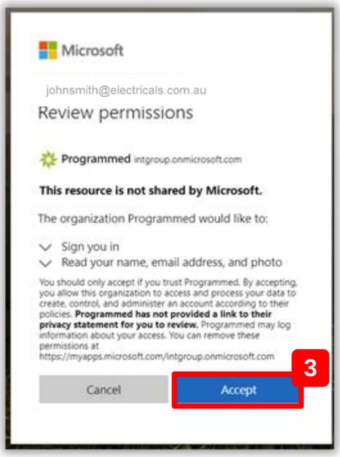
RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

1.1.3 IF YOU HAVE A ORGANISATION ACCOUNT

To login to the Programmed Vendor Portal: Click on the **Accept invitation** button, you have received from Microsoft (*invites@microsoft.com*) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Enter the password relating to your company email account and click **Sign in**
2. Click **Yes**
3. Review the permissions and click **Accept** to proceed.





RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome

1.2 Login After First Successful Attempt

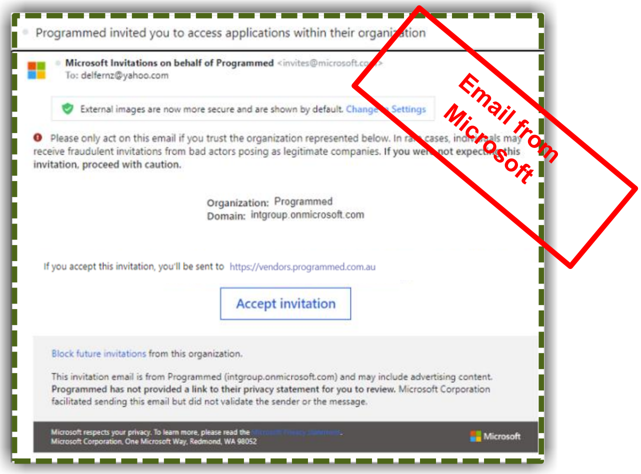
After you have completed the authentication setup process, you can then continue to log into the Programmed Vendor Portal when required:

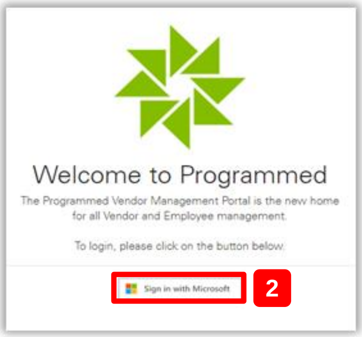
1. Click on the hyperlink: (*https://vendors.programmed.com.au*) you received from Microsoft Invitations in section 1.1
2. Click on **Sign in with Microsoft**
3. Enter **your email as the username** and click **Next**

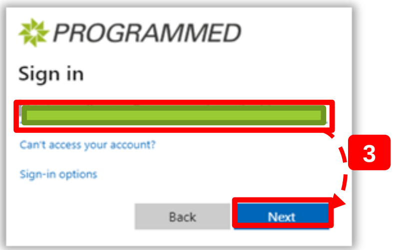
Note: This is the email you used in section 1.1(Login for the first time)

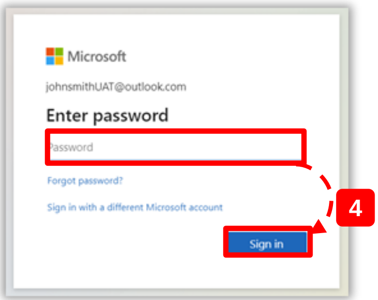
4. Enter the password relating to your email account and click **Sign in**

RESULT: You have now logged into the Programmed Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.









2 Update Company Details

You can update your organisation's bank details, address and contact details. Some changes which are made will need to be reviewed and approved by Programmed.

Note: The document should be an official document such as a bank slip which displays the BSB and account number, company name and address.

To update Company Details:

1. On the Vendor Portal home page, click on **Company Details**
2. Click on **Edit Information**
3. Enter/Edit the required information

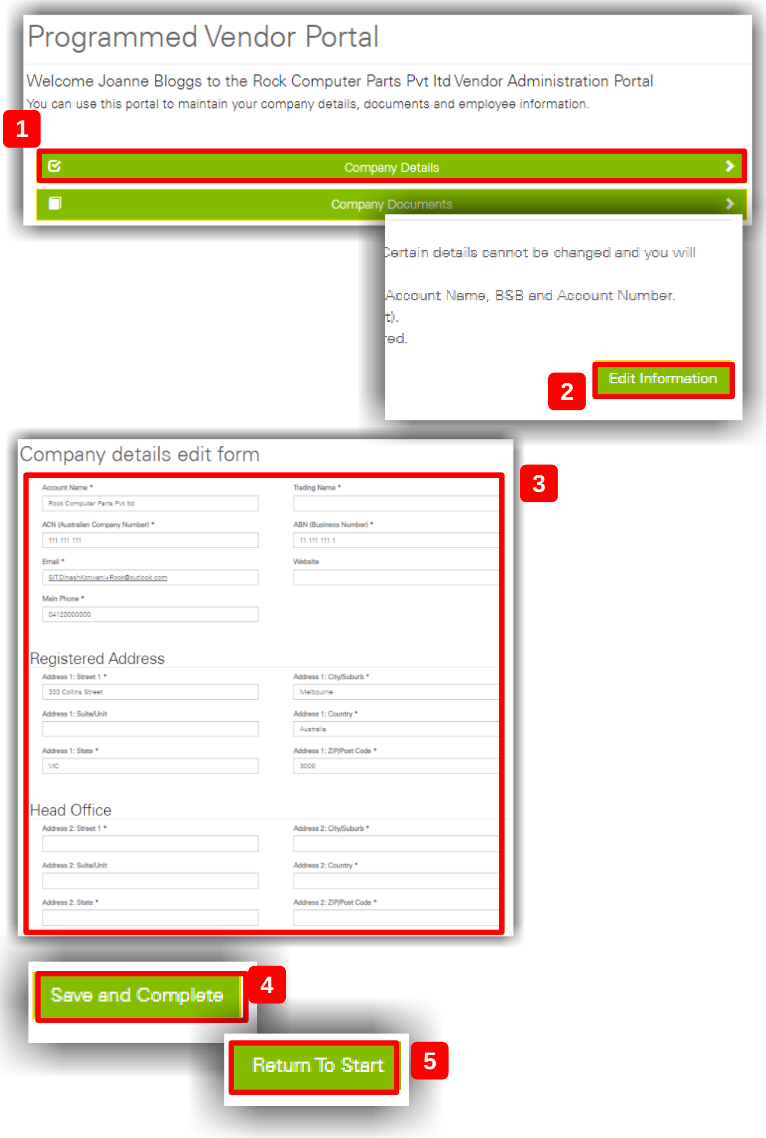
If you have updated the **Bank Details** then, please attach evidence (such a bank deposit slip) in the **Company Document** section, which clearly shows the Account Name, BSB and Account Number.

4. Click on **Save and Complete**
5. Click on **Return to Start**

RESULT: The relevant changes to **Company Details** have been saved and submitted.

To come back to the Vendor Portal home page, click on the **Home** button in the top menu.

If the bank details are being updated, the contact nominated as the Director in this account will be notified via email of the requested change.



3 Update Company Documents

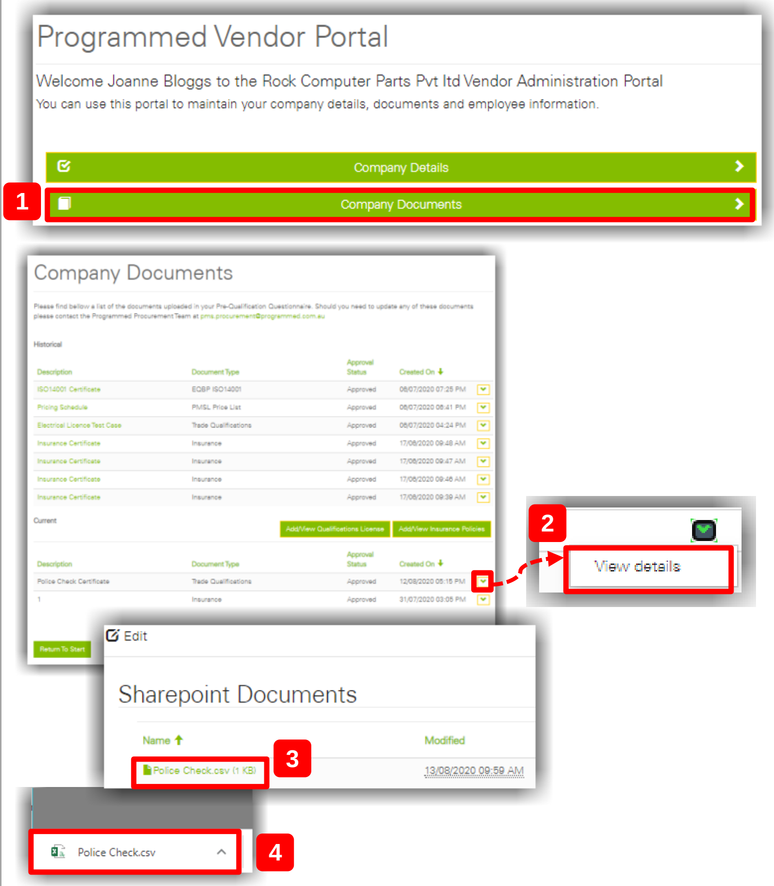
The documents submitted during and after the Pre-Qualification process are visible here. Your organisation can submit additional documents which may be required as evidence, such as new insurance certificates or documentary evidence for new bank details updated in the Company Details section.

3.1 View All Company Documents

To view submitted Company Document:

3. On the Vendor Portal home page, click on **Company Documents**
4. Click on **View Details**
5. Click on the document **Name,** to download the file
6. At the bottom left of your Chrome browser, click on the file to open.

RESULT: The document is now downloaded and viewable.

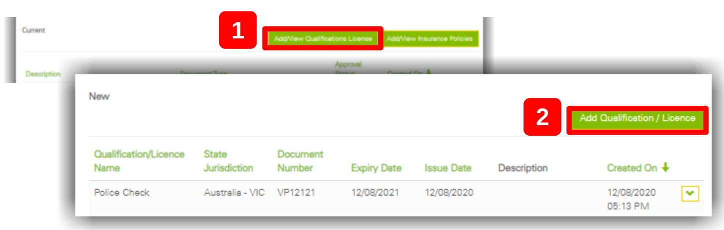


3.2 Update Qualifications/License

To update Qualifications and License:

1. In the Company Documents page, click on **Add/View Qualifications License**
2. Click on **Add Qualification/License**

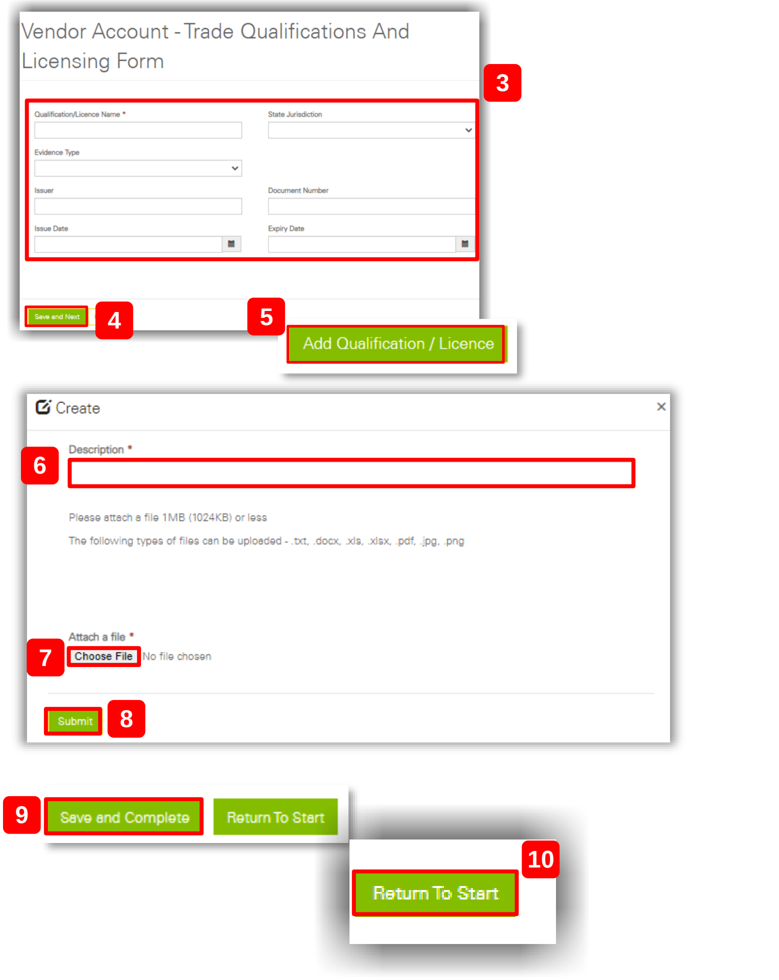
RESULT: The **Vendor Account- Trade Qualifications And Licensing Form** will appear.



3. Complete the following fields: **Qualifications Name, Evidence Type, Issuer, Issue Date, State Jurisdiction, Document Number and Expiry Date**
4. Click on **Save and Next**
5. Click on **Add Qualification / License**
6. Enter a **Description**
7. Click **Choose File**, and select the file you want to upload on your computer and click Open (.txt,.docx, .xls, .xlsx, .pdf, .jpg, .png).
8. Click on **Submit**
9. Click on **Save and Complete**
10. Click on **Return to Start**

RESULT: The **Qualification/License** has been uploaded and will be reviewed and approved by Programmed.

When the company licence is due to expire, it will send an automatic email to the vendor administrator requesting the updated information.



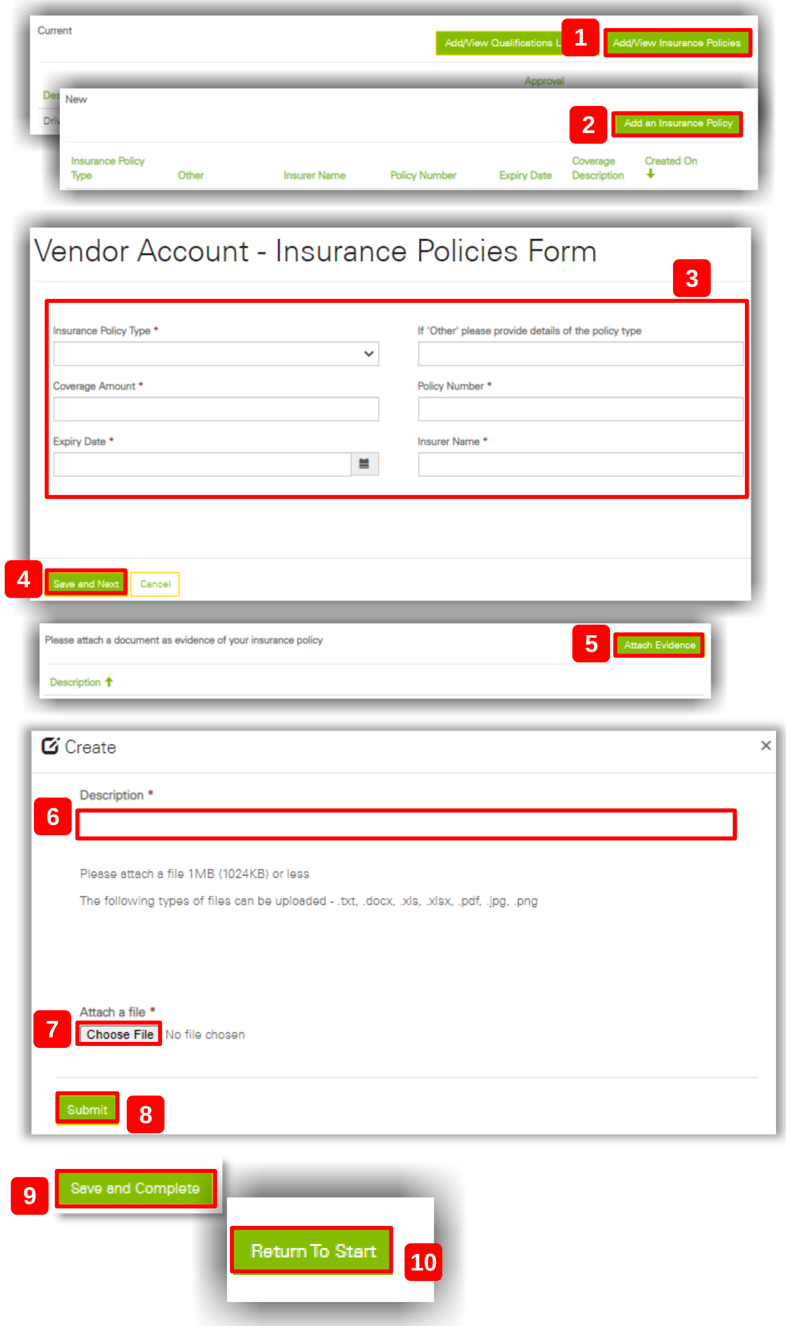
3.3 Update Insurance Policies

To update Insurance Policies:

1. In the Company Documents page, click on **Add/View Insurance Policies**
2. Click on **Add an Insurance Policy**
3. Complete the following fields: **Insurance Policy Type, Coverage Amount, Policy Number, Expiry Date, Insurer Name**
4. Click on **Save and Next**
5. Click on **Attach Evidence**
6. Enter a **Description**
7. Click **Choose File** and select the file you want to upload on your computer and click Open (.txt, .docx, .xls, .xlsx, .pdf, .jpg, .png).
8. Click on **Submit**
9. Click on **Save and Complete**
10. Click on **Return to Start**

RESULT: The **Insurance Policy** has been uploaded and will be reviewed and approved by Programmed.

When the insurance policies is due to expire, it will send an automatic email to the vendor administrator requesting the updated information.



4 Upload Financial Documents

In the Vendor Portal, you can upload financial documents such as Invoices and Credit Notes. This feature will only be available for Programmed Entities connected to Dynamics 365 FinOps.

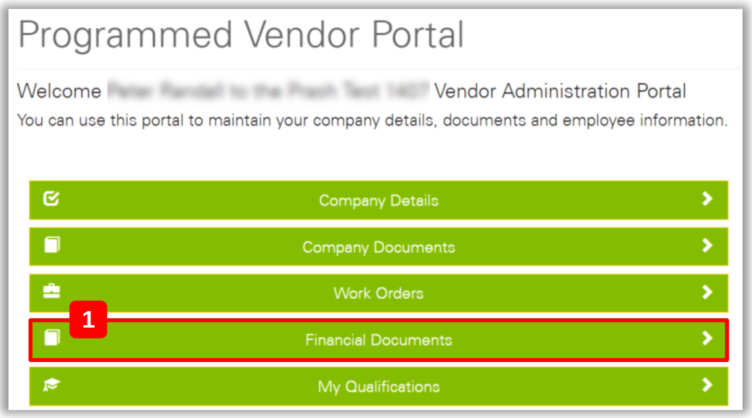
To upload financial documents in the Vendor Portal:

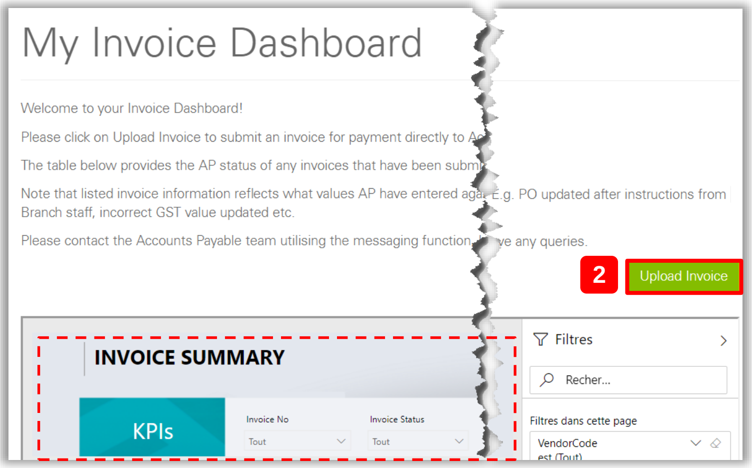
1. On the Vendor Portal home page, click **Financial Documents**

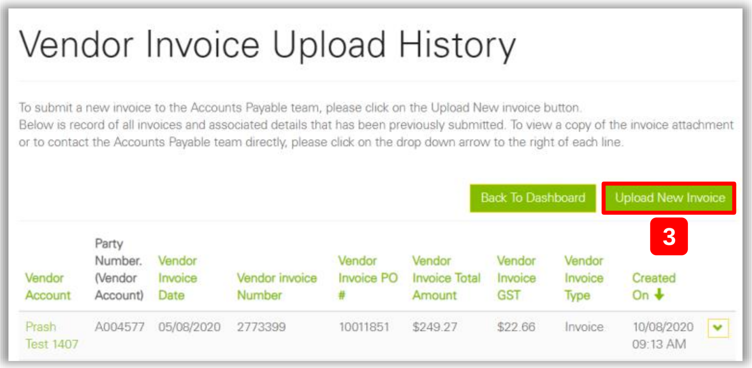
RESULT: Your My Invoice Dashboard displays. You will be able to see the AP status of any invoices ever submitted.

> This data is refreshed periodically throughout the working day.
>
> The information displayed reflects what values AP have entered against your invoice. It **could be different** to the information that was included at invoice submission (e.g.: PO updated after instructions from Branch staff, incorrect GST value updated etc.).

2. Click **Upload Invoice**
3. Click **Upload New Invoice**

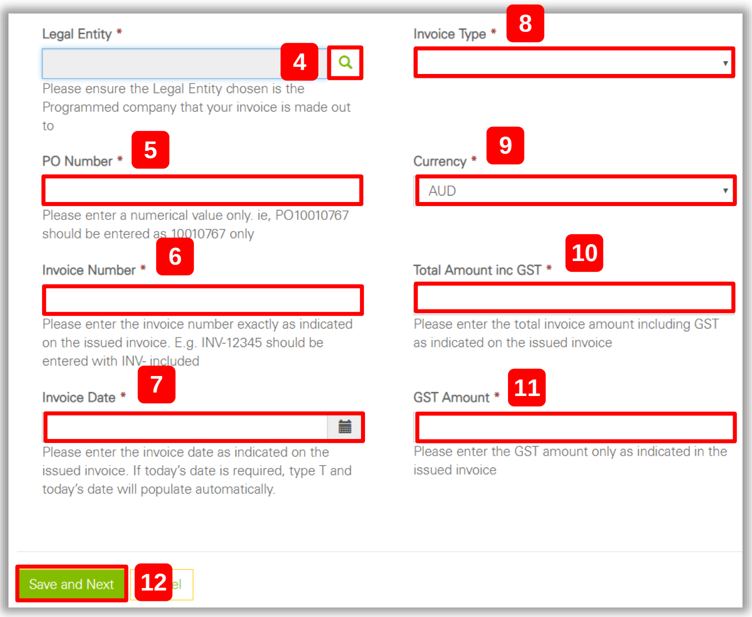






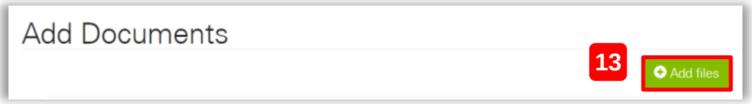
4. Use the **Magnifying glass** to select the **Legal Entity** (make sure to pick the correct one)
5. Input the **PO Number** **(<u>only numbers, no letters</u>)**
6. Input the **Invoice Number,** exactly as per the issued invoice
7. Select the **Invoice Date**, as per the issued invoice
8. Select the **Invoice Type** (Invoice or Credit Note)
9. Check the **Currency** is correct and update if required
10. Input the **Total Amount, including GST**, as per the issued invoice
11. Input the **GST Amount**, as per the issued invoice
12. Click **Save and Next**

RESULT: The Vendor Invoice record is created, now you must attach the invoice to complete the process.



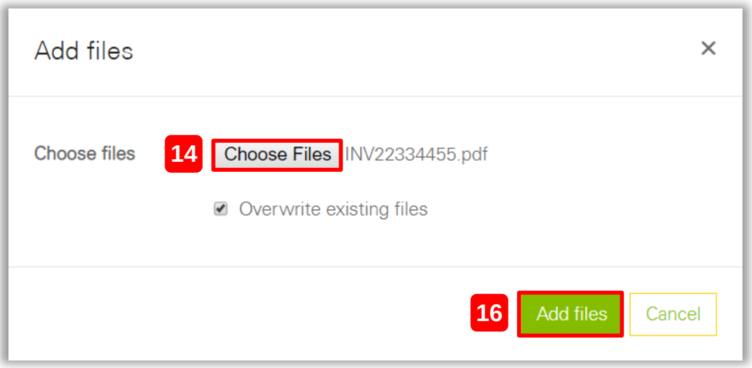
<u>Only one attachment can be submitted per invoice submission</u> with maximum file size of 10MB.

<u>PDF</u> is Programmed's **<u>preferred</u>** file type for all invoices.



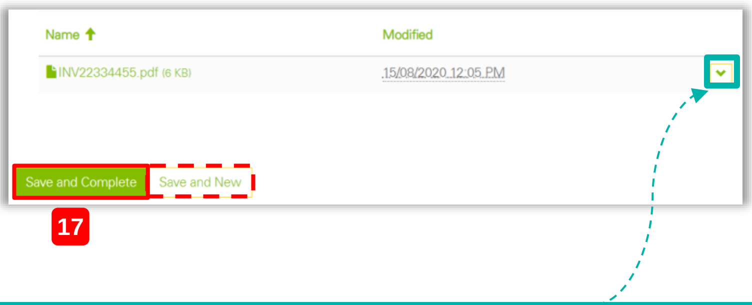
13. In the **Add Documents** section, click **+Add files**
14. Click **Choose Files**
15. Select the relevant document on your computer and click **Open**

If you keep **Overwrite existing files** ticked, the file will replace any document with the same name.



16. Click **Add files**

RESULT: The File displays in the Add Documents section.



17. Click **Save and Complete** to submit the invoice to the AP team or click **Save and New** if you want

If you uploaded the wrong file, you can delete it: click on the **drop-down icon** next to the file and select **Delete**. Then, follow **steps 13 – 17** to upload the correct document.

<table>
<tr>
<td>
to add an additional invoice / credit note.

RESULT: Once submitted, a confirmation will be sent to your registered email address.
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<td></td>
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<tr>
<td>
If you want to see the details of any invoice you submitted, you can use the View Details tab in the Vendor Invoice Upload History screen:

1. Next to the invoice you want to see the details for, click the drop-down arrow at the right of the line
2. Select View details

RESULT: You will be able to see more details of the invoice and a preview of the document previously uploaded.
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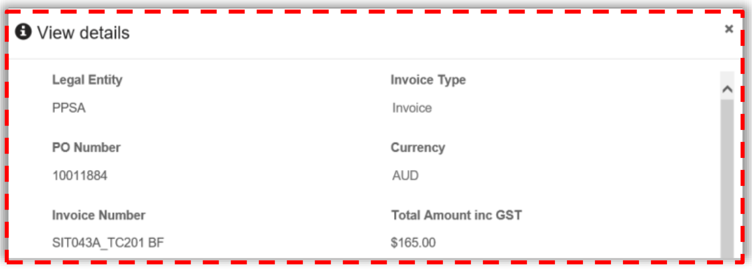

</td>
</tr>
<tr>
<td>
If you need to contact the AP team, you can use the messaging tab in the Vendor Invoice Upload History screen:

1. Next to the invoice you have a query for, click the drop-down arrow at the right of the line
2. Select Send Message
3. Verify the Legal Entity you want to contact is correct
4. Enter a message with your contact details
5. Click on Send Message

RESULT: The message will be sent to the relevant AP team.
</td>
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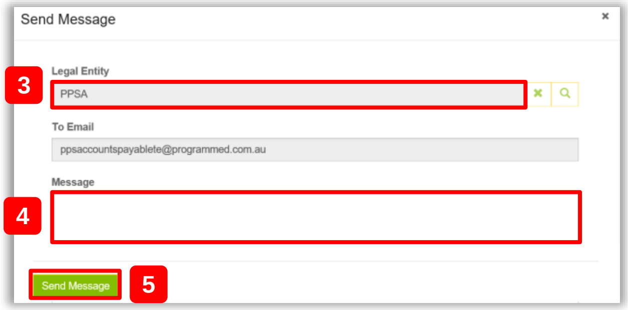


</td>
</tr>
</table>

5 Manage Relevant Employee Information and Access

5.1 Add Relevant Employee and Enable Portal Access

1. On the Vendor Portal home page, click on **Employee/ 3rd Party Subcontractor Information**
2. Click on **Add New Employee**
3. Fill in the mandatory fields (indicated with a *)
4. Select the relevant portal access level

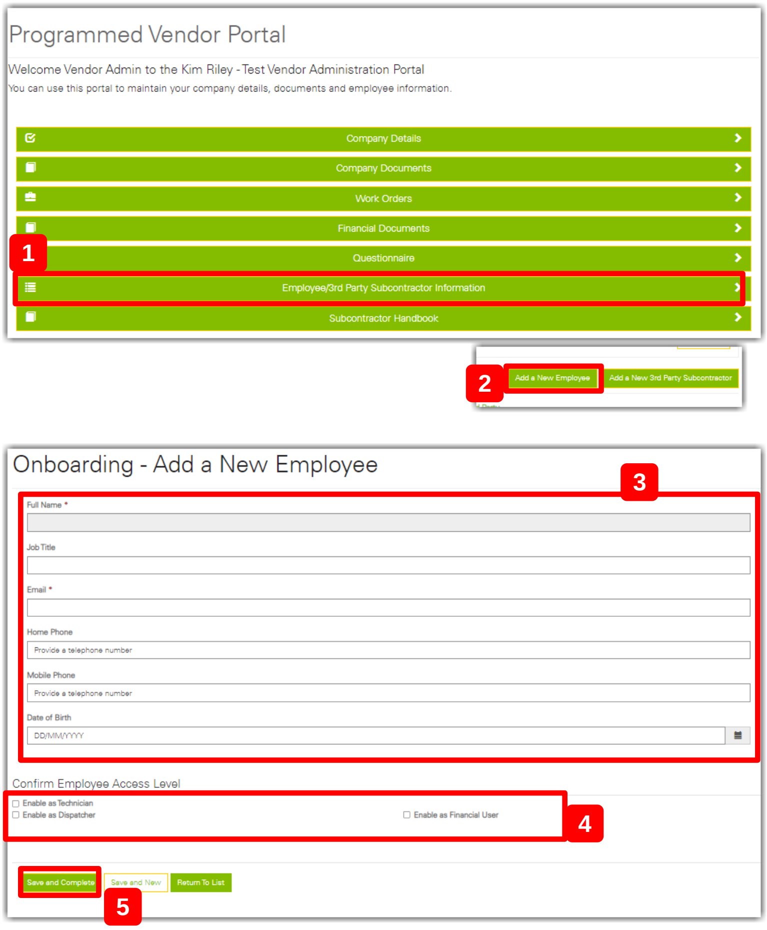
The access options available here can be used as the following:

- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

RESULT: The employee will be created and displayed on the Employee Summary page.

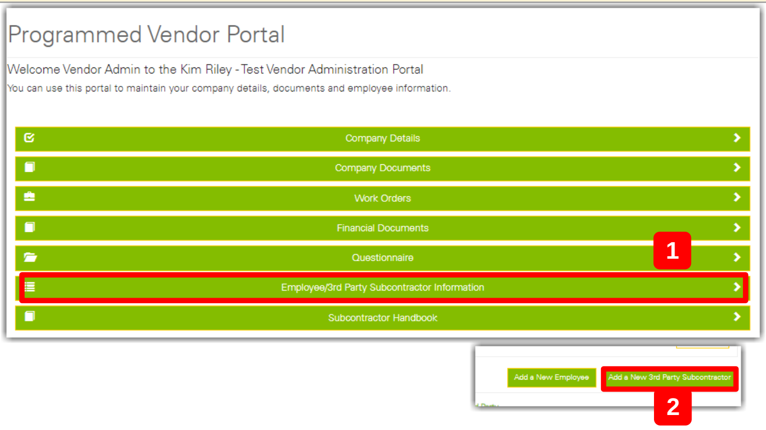
6. Repeat the steps according to the number of employees you want to add.

Once add the employee, an invitation will be sent to the employee automatically. The invited employees will be able to edit their contact details, complete the Programmed Induction, get their Programmed Induction Card, update their Qualifications and review the Programmed Handbook and Policies Procedures.



5.2 Add a New 3rd Party Subcontractor and Enable Portal Access

1. On the Vendor Portal home page, click on **Employee/ 3rd Party Subcontractor Information**
2. Click on **Add a New 3rd Party Subcontractor**
3. If this is subcontractor which has been onboarded with Programmed already then you can search and select it from the drop down **ELSE** enter the:
   - **Subcontractor Company Name**
   - **Subcontractor Registered Name**
   - **Subcontractor ABN**

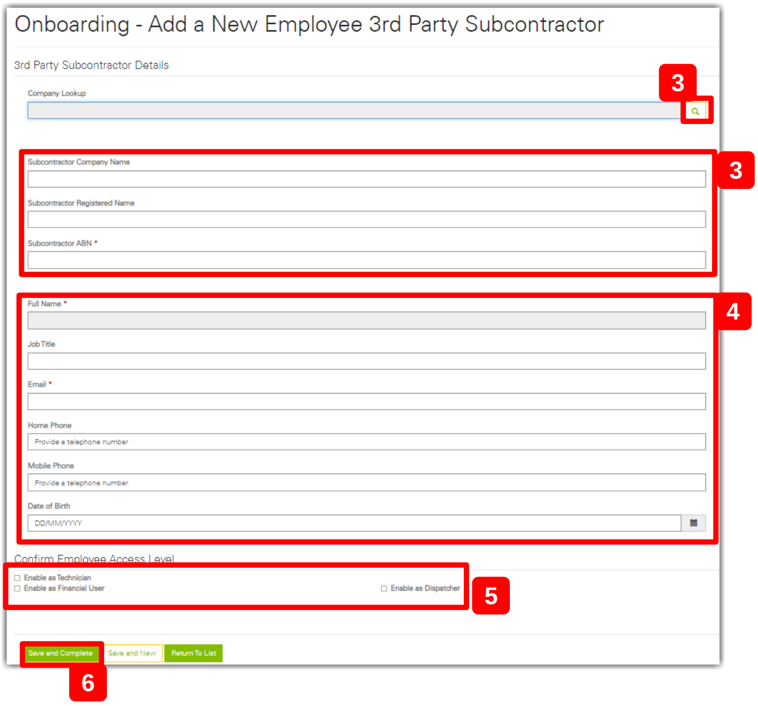


4. Fill in the mandatory fields (indicated with a *)
5. Select the relevant portal access level

The access options available here can be used as the following:

- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

6. Click on **Save and Complete**



RESULT: The 3rd party subcontractor will be created and displayed on the Employee Summary page.

5.3 Confirm Employee Access Type and Upload Their Qualification Evidences

As a Vendor Administrator, you can upload qualification evidences on behalf of your employees:

1. On the Vendor Portal home page, click on **Employee/ 3rd Party Subcontractor Information**
2. Click on the **drop-down arrow** next to the employee you would like to upload the qualification evidence for.
3. Click on **Modify Employee**
4. Provide the employee with the appropriate access in the **Confirm Access Level** options

The access options available here can be used as the following:

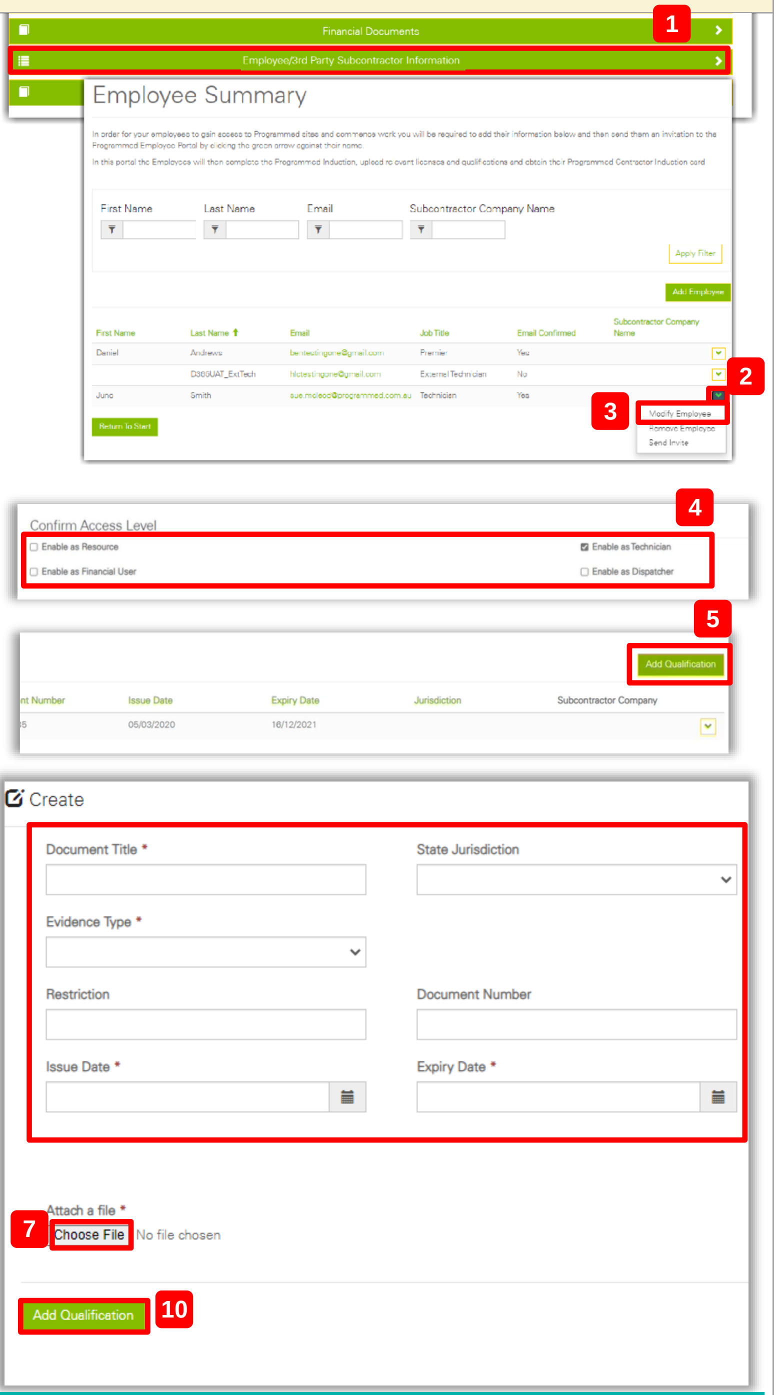
- **Enable as Resource:** Is selected automatically once the employee is created
- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

5. Click on **Add Qualification**
6. Fill in the **mandatory fields**
7. Click on **Choose file**
8. Select the document you would like to upload from your computer
9. Click on **Open**
10. Click on **Add Qualification**

RESULT: The document displays on the page.

11. Click on **Save Changes**

RESULT: The documents will be uploaded on the **Vendor Portal** and will be available to the employee when they



When the employee's certificate is due to expire, it will send an automatic email to the employee requesting the updated information, as well as a Microsoft sign on link if they have not logged into the portal before.

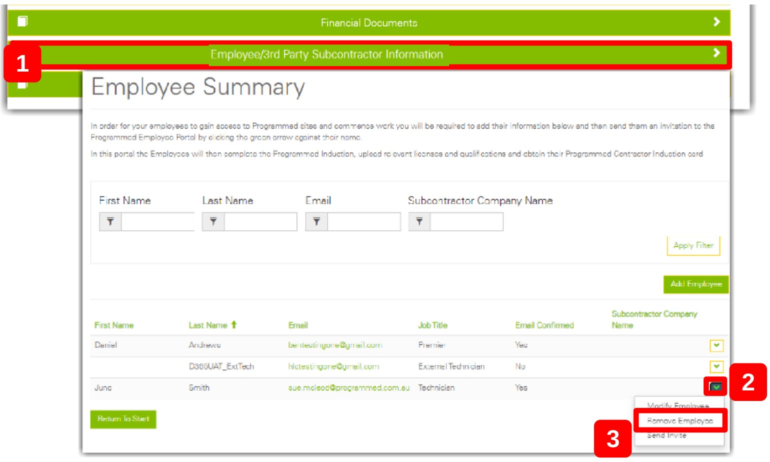
log into the portal, under **My Qualifications** section.

5.4 Remove an Employee from the Vendor Portal

As a Vendor Administrator, you can remove an employee from the list that appears in employee summary:

1. On the Vendor Portal home page, click on **Employee/ 3rd Party Subcontractor Information**
2. Click on the **drop-down arrow** next to the employee you would like to remove
3. Click on **Remove Employee**

RESULT: The employee's status for Invited to Portal will change from Yes to No.



If you have any questions about this process or need help, please reach out:

- PMS.Procurement@programmed.com.au
- VendorManagement@programmed.com.au

6 Troubleshooting

Below are some troubleshooting guides which may assist in logging into the Programmed Vendor Portal in case of errors.

6.1 When having issues with logging into the portal:

When accessing the Programmed Vendor Portal, there are some common errors that may occur upon login. Please refer to the below to first clear up these potential errors whilst logging in.

6.1.1 DO YOU HAVE MULTI-FACTOR AUTHENTICATION? (SINGLE SIGN-ON)

If a multi-factor authentication has been set, an authentication process will need to be followed. It requires a unique email address set up against a Microsoft account. This authentication can be completed by setting up the Microsoft Multi-Factor Authentication App on your mobile device and can be downloaded from the Apple Store or Google Play.

More information on the Multi-Factor Authentication can be found here:

- What is Multi-Factor Authentication
- How does Single Sign-On Work
- Reasons why the Authentication doesn't work

6.1.2 HAVE YOU REFERRED TO THE GUIDES AVAILABLE TO YOU?

Some of the guides available to you include:

- Using Programmed Vendor Portal as a Vendor Admin (current guide)
- Using Programmed Vendor Portal as a Vendor Employee or Technician
- Accessing the Programmed Vendor Portal
- Manage Knowledge Articles

6.1.3 IF USING A DESKTOP, ARE YOU USING THE RECOMMENDED BROWSER?

There are some recommended applications that can be used for the Programmed Vendor Portal for desktop devices. These are Google Chrome and Microsoft Edge. Speak to your organisational IT representative to assist you in downloading these applications on your device.

Using Private / Incognito mode:

By using private or incognito mode on your web browser, it is easier to over-ride your existing passwords and access the Programmed Vendor Portal.

- These are the instructions on how to access the Google Chrome Incognito Mode
- These are the instructions on how to open a InPrivate Window in Microsoft Edge

6.1.4 IS A PHONE BEING USED?

As a general rule of thumb, it is not recommended to use mobile phones to complete or access information in the Programmed Vendor Portal. This is because the compatibility for the screens displays a lot better on desktop, laptop and tablet devices.

Having said that, an iPhone can also be used to access the Programmed Vendor Portal, as long as the Safari web browser is used.

6.1.5 IS IT A SHARED DEVICE OR A PERSONALISED DEVICE?

Although using a shared device to access the Vendor Portal is possible, it is important to use individual credentials to log into the portal and access the on-boarding and induction information. If a previous user has remained logged into the Microsoft account on the device, or the portal is defaulted to their name, refer to the next step on clearing the browser history.

6.1.6 IS THE BROWSER HISTORY AND CACHE CLEARED?

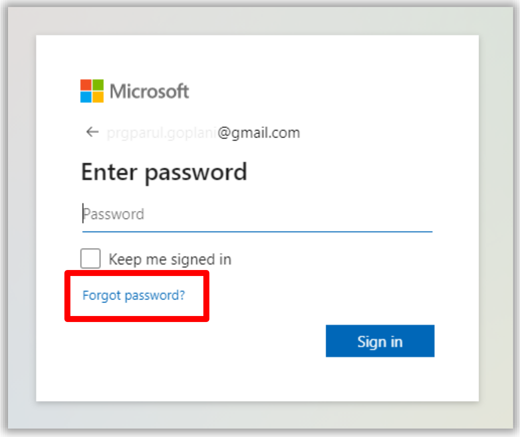
Sometimes, the previously used websites leave a trail that blocks new websites from being opened. This may need to be cleared so that the Vendor Portal displays. It is also recommended to close all the open websites on the device when completing this process of clearing history and cache.

- Google describes how to clear this browser history and cache here
- Microsoft Edge describes how to clear this browser history and cache here

6.1.7 IS THE CORRECT PASSWORD BEING USED FOR THE MICROSOFT ACCOUNT?

When logging into the Programmed Vendor Portal, there is a requirement to have a Microsoft Account set up. The password for this account may be different to the organisational account passwords and does not update if the organisational account is updated.

If the Microsoft password has been forgotten, this can be reset following the Forgotten Password link on the Microsoft login page.



6.1.8 ARE ORGANISATIONAL SECURITY PERMISSIONS RESTRICTING THE PORTAL?

Some organisations build in restrictions to the devices supplied by them to restrict unfamiliar websites from being accessed in the system. If there are security restrictions, that are not permitting the login for the system, it is led by the organization.

Options to permit the use of the Programmed Vendor Portal include:

- Add Programmed and Microsoft Accounts to the whitelist of organizational systems
- Provide another email id that accepts invitations from Programmed and Microsoft

6.1.9 INITIAL LOGIN ISSUES NOT RESOLVED BY THE ABOVE?

If the above tips have not ended in a successful login, it is suggested to do the following:

- Contact your internal IT department to see if there are any restrictions on the device that may be blocking access
- Create a new Outlook account as a different credential to use for logging into the portal.

6.1.10 LOG IN AFTER THE FIRST SUCCESSFUL LOGIN?

When logging into the Programmed Vendor Portal the first time, an access link is sent to vendors for access into the portal. Once the initial login process is complete, the access link is no longer a valid method of accessing the portal.

Please use the following website to log into the system: *https://vendors.programmed.com.au*

It is recommended to have this website saved as one of your favourites on the web browser being used.

6.2 For Vendor Admins

Vendor Admins are responsible for maintaining the records of their organizational employees, providing them with access and updating the vendor portal as required. As such, there are some troubleshooting tips specific to them.

6.2.1 WHEN MANAGING EMPLOYEE PROFILES WITH REPEATED EMAIL IDS.

If a new contact is being created in the Programmed Vendor Portal, it is a requirement of the system to use a unique email address for each contact. Therefore, create a new unique email address for the employee so they can access the portal and be set up as a new contact.

If this is not something that is possible, contact Programmed for a resolution.

6.2.2 WHEN MANAGING EMPLOYEE PROFILES WITH ISSUES ACCESSING INDUCTIONS.

If you, or one of the employees you are supporting, are unable to access the on-boarding induction, contact Programmed to confirm.

6.2.3 ERRORS UPDATING CERTIFICATES OF CURRENCY OR BUSINESS DETAILS

Please refer to page 12 of this document to review how to update these details. If errors persist, contact Programmed for support with updating the information.

6.3 For Vendor Employees (Including Administrators):

Vendor employees, including vendor administrators, may have errors when accessing the Programmed Vendor Portal.

6.3.1 PROGRAMMED INDUCTION HAS EXPIRED

When the on-boarding and site inductions required by Programmed are close to expiring, a reminder email to complete them is sent to the employee email ID. These reminders are sent from the system 1 month prior to the actual induction expiry date and alerts vendor employees of the requirement to update.

For most qualifications and licenses, they can be updated prior to the expiry date.

However, for the Sub-Contractor Induction Card, there is a requirement that the induction can only be updated after the expiry is complete. To update the Sub-contractor induction before the expiry date, navigate to the Programmed Vendor Portal instead and complete the induction from there. If this induction is not completed prior to the expiry date, the system will automatically place all the work orders on hold until this is completed.