

Using Programmed Vendor Portal (Vendor Admin)– User Guide

D365 Project

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Prepared for:

Programmed`s
Vendor

Prepared by:

D365 Training Team

Purpose:	The purpose of this User Guide is to assist Vendor Administrators in logging into and using the Programmed Vendor Portal.
Overview:	<p>Once a company's pre-qualification has been approved, the Vendor Portal can be used to update and view:</p> <ul style="list-style-type: none">• 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 <p>If you are a vendor employee or technician, then please refer to the user-guide below on:</p> <ul style="list-style-type: none">• Accessing the portal as a vendor employee and completing your induction-Using Programmed Vendor Portal as a Vendor Employee/Technician
Assistance:	<p>For any assistance,</p> <ul style="list-style-type: none">• PMS.Procurement@programmed.com.au• pfnwavm@programmed.com.au- For PFM WA vendors

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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

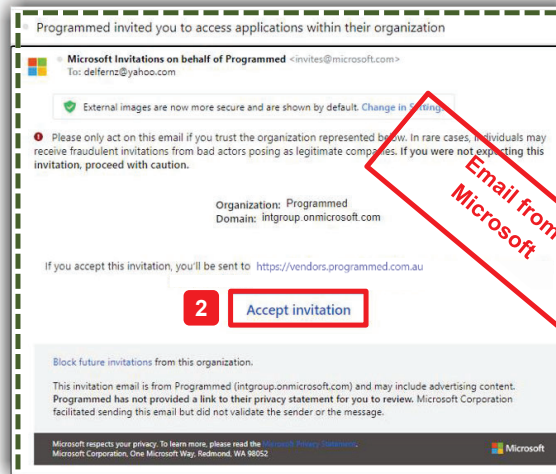
Note: This include all the other variations/domains such as .com.au or .com.nz etc

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.](#)



Email from
Programmed



Email from
Microsoft

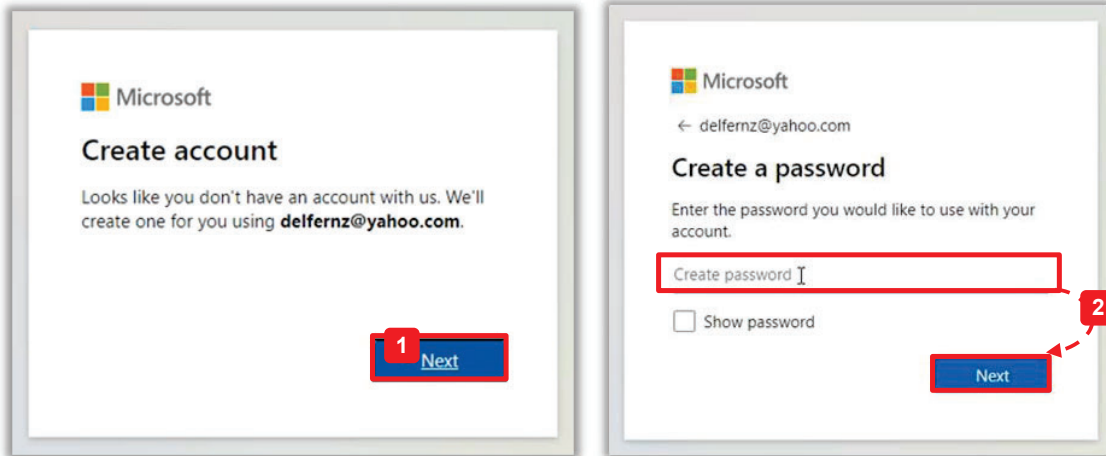


If you haven't received the email, please check your **Junk/Spam** folder in your mailbox. If the issue persists, please contact Programmed to help you.

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



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1 Verify your email address

Microsoft account team <account-security-noreply@accountprotection.microsoft.com>
To: delfernz@yahoo.com

Microsoft account

Verify your email address

To finish setting up your Microsoft account, we just need to make sure this email address is yours.

To verify your email address use this security code: **2044**

If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.

Thanks,
The Microsoft account team

2 Verify email

Microsoft

delfernz@yahoo.com

Enter the code we sent to **delfernz@yahoo.com**. If you didn't get the email, check your junk folder or try again.

Enter code

☒ I would like information, tips, and offers about Microsoft products and services.

Choosing **Next** means that you agree to the Microsoft Services Agreement and privacy and cookies statement.

4 Next

3 Create account

Microsoft

delfernz@yahoo.com

Before proceeding, we need to make sure a real person is creating this account.

5 Enter the characters you see

6 Next

4 Is your security info still accurate?

Microsoft

delfernz@yahoo.com

We just want to make sure this security info is up-to-date, so we can use it to verify your identity or alert you if there's ever a problem with your account.

- delfernz@yahoo.com

I don't have any of these

7 Update now Looks good!

5 Stay signed in?

Microsoft

delfernz@yahoo.com

Stay signed in so you don't have to sign in again next time.

☐ Don't show this again

8 No Yes

6 Review permissions

Microsoft

delfernz@yahoo.com

Programmed intgroup.onmicrosoft.com

This resource is not shared by Microsoft.

The organization Programmed would like to:

- Sign you in
- Read your name, email address, and photo

You should only accept if you trust Programmed. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. Programmed has not provided a link to their privacy statement for you to review. Programmed may log information about your access. You can remove these permissions at: <https://myapps.microsoft.com/intgroup.onmicrosoft.com>

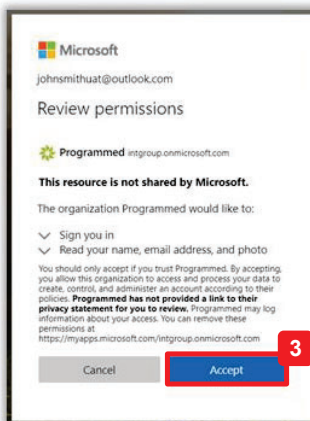
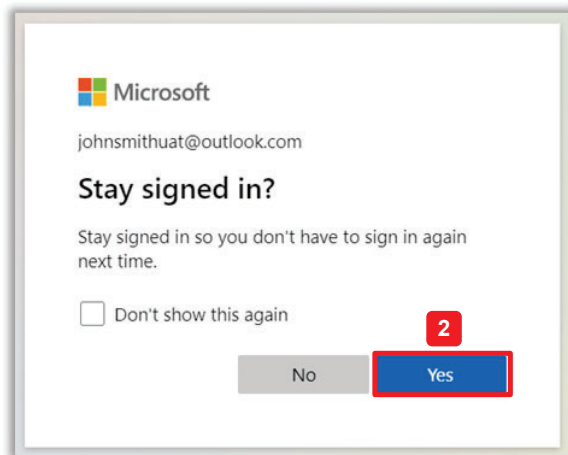
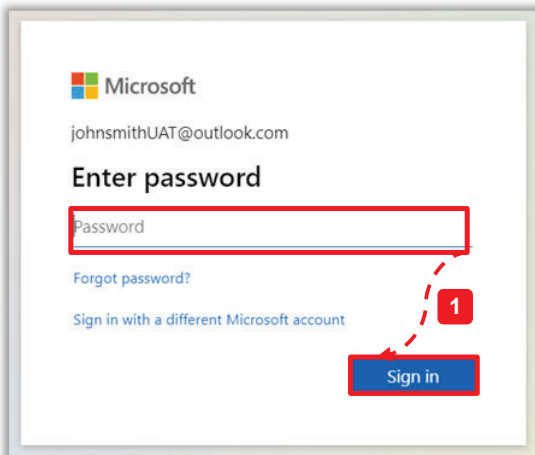
9 Cancel Accept

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

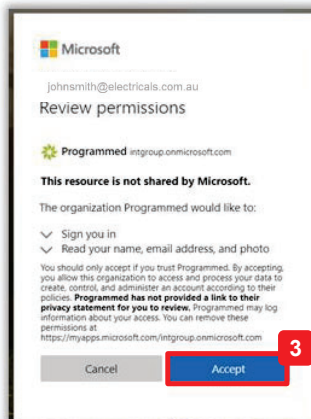
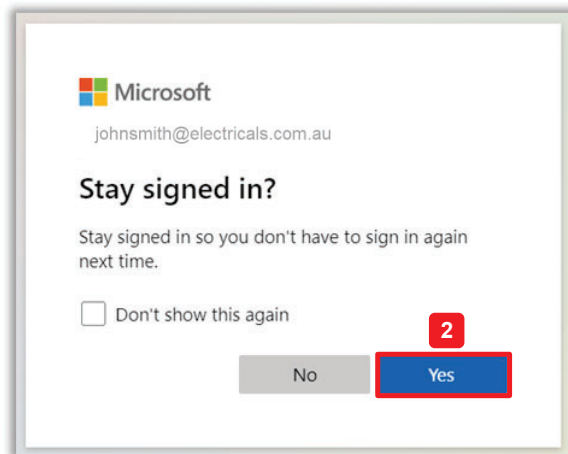
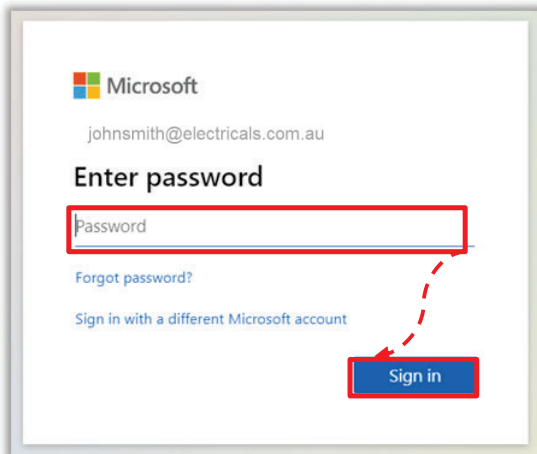


RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

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

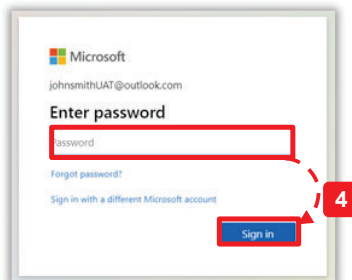
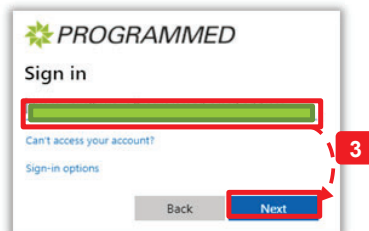
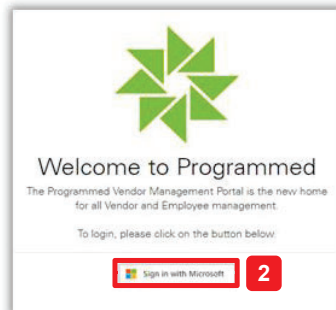
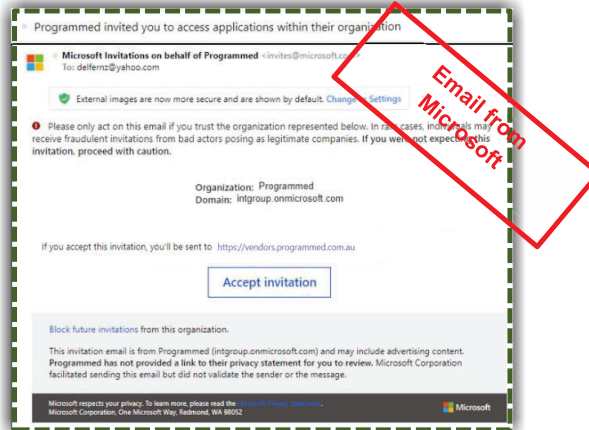
After you have completed the authentication setup process, you can then continue to log into the Programmed Vendor Portal when required:

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

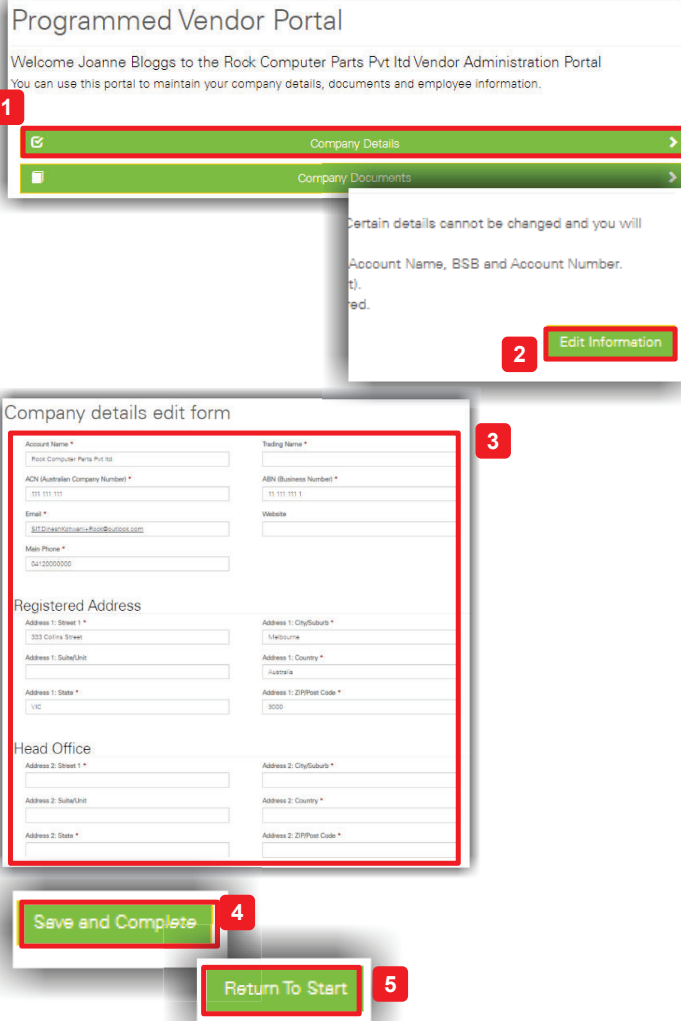
 If you have updated the **Bank Details** then, please attach evidence (such a bank deposit slip) in the **Company Document** section, which clearly shows the Account Name, BSB and Account Number.

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.



The screenshot illustrates the process of updating company details in the Programmed Vendor Portal. It shows the following steps:

- Step 1:** The user is on the 'Programmed Vendor Portal' home page. A red box highlights the 'Company Details' link in the top navigation bar.
- Step 2:** A modal window titled 'Edit Information' is displayed, showing a warning that certain details cannot be changed and a list of fields to be updated: Account Name, BSB, and Account Number. A red box highlights the 'Edit Information' button.
- Step 3:** The 'Company details edit form' is shown. It contains fields for Account Name, Trading Name, ACN, ABN, Email, Website, Main Phone, Registered Address (Street, City/Suburb, State, ZIP/Post Code), and Head Office (Street, City/Suburb, State, ZIP/Post Code). A red box highlights the form fields.
- Step 4:** A red box highlights the 'Save and Complete' button.
- Step 5:** A red box highlights the 'Return To Start' button.

3 Update Company Documents

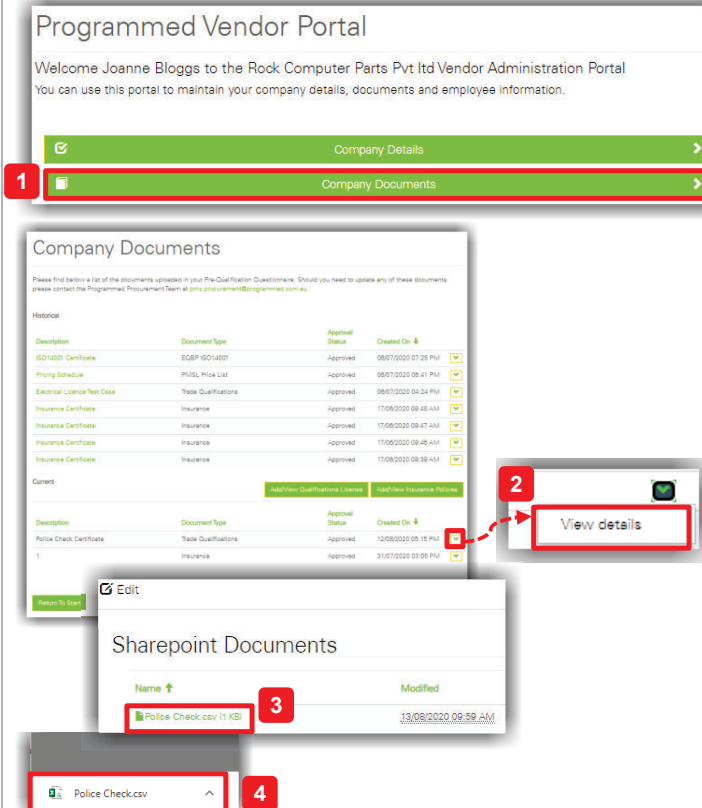
The documents submitted during and after the Pre-Qualification process are visible here. Your organisation can submit additional documents which may be required as evidence, such as new insurance certificates or documentary evidence for new bank details updated in the Company Details section.

3.1 View All Company Documents

To view submitted Company Document:

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

RESULT: The document is now downloaded and viewable.



Programmed Vendor Portal

Welcome Joanne Bloggs to the Rock Computer Parts Pvt Ltd Vendor Administration Portal
You can use this portal to maintain your company details, documents and employee information.

Company Documents

Please find below a list of the documents updated in your Pre-Qualification Questionnaire. Should you need to update any of these documents, please contact the Programmed Procurement Team at pms.programmed@programmed.com.au.

Description	Document Type	Approval Status	Created On
ISO14001 Certificate	ESBP ISO14001	Approved	08/07/2020 07:05 PM
Pricing Schedule	PVSL Price List	Approved	08/07/2020 08:41 PM
Electronic Licence Test Case	Trade Qualifications	Approved	08/07/2020 04:24 PM
Insurance Certificate	Insurance	Approved	17/08/2020 09:48 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:47 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:48 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:39 AM

Current

Description	Document Type	Approval Status	Created On
Police Check Certificate	Trade Qualifications	Approved	12/08/2020 09:18 PM
1	Insurance	Approved	01/07/2020 03:08 PM

Sharepoint Documents

Name	Modified
Police Check.csv (1 KB)	13/08/2020 09:59 AM

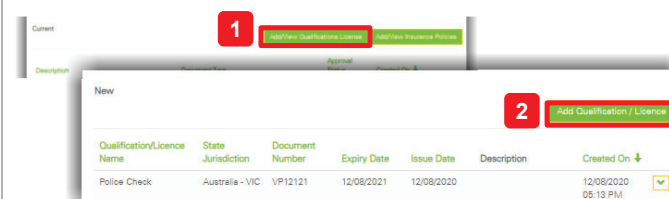
Police Check.csv

3.2 Update Qualifications/License

To update Qualifications and License:

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

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

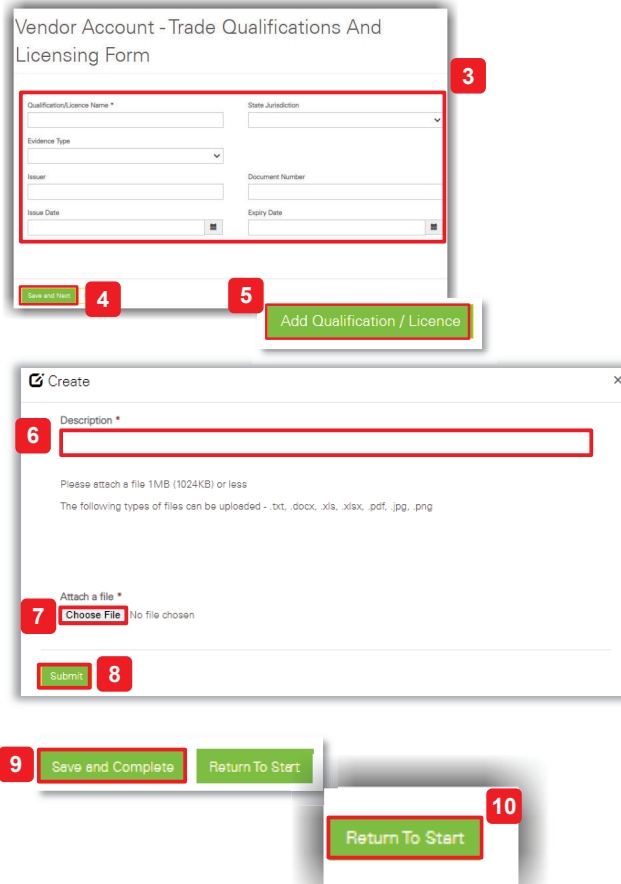


Add/View Qualifications License

Qualification/License Name	State Jurisdiction	Document Number	Expiry Date	Issue Date	Description	Created On
Police Check	Australia - VIC	VP12121	12/08/2021	12/08/2020		12/08/2020 09:13 PM

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.



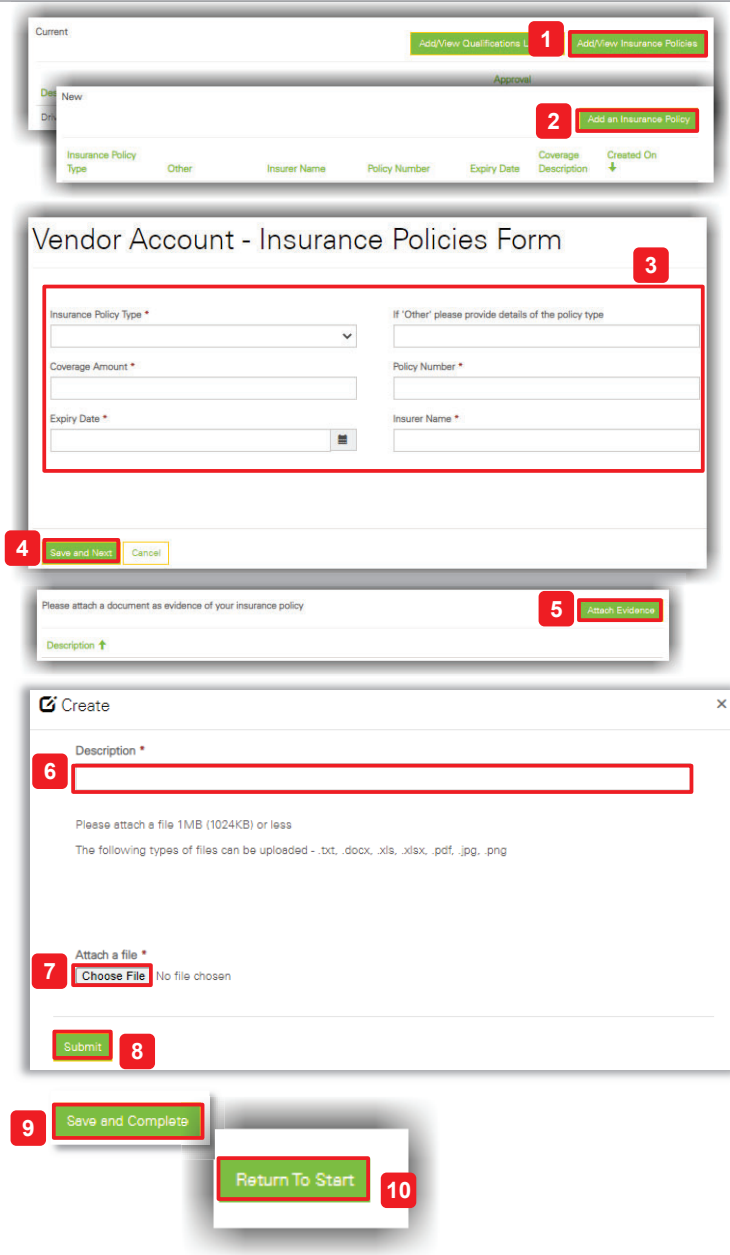
The screenshot displays the 'Vendor Account - Trade Qualifications And Licensing Form'. It includes fields for Qualification/License Name, State Jurisdiction, Evidence Type, Issuer, Document Number, Issue Date, and Expiry Date. A red box highlights these fields, with a red circle '3' next to it. Below the form are buttons for 'Save and Next' (labeled '4'), 'Add Qualification / License' (labeled '5'), and 'Submit' (labeled '8'). A 'Create' dialog box is shown with a 'Description' field (labeled '6'), a file upload section with a 'Choose File' button (labeled '7'), and a 'Submit' button (labeled '8'). At the bottom, there are buttons for 'Save and Complete' (labeled '9') and 'Return To Start' (labeled '10').

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.



The screenshot displays the 'Vendor Account - Insurance Policies Form' with the following steps highlighted:

- Step 1:** 'Add/View Insurance Policies' button in the top right corner.
- Step 2:** 'Add an Insurance Policy' button in the top right corner of the form.
- Step 3:** The form fields: 'Insurance Policy Type', 'Coverage Amount', 'Policy Number', 'Expiry Date', and 'Insurer Name'.
- Step 4:** 'Save and Next' button.
- Step 5:** 'Attach Evidence' button.
- Step 6:** 'Description' text input field.
- Step 7:** 'Choose File' button under the 'Attach a file' section.
- Step 8:** 'Submit' button.
- Step 9:** 'Save and Complete' button.
- Step 10:** 'Return To Start' button.

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**

Programmed Vendor Portal

Welcome *Prash Prash to the Prash Test 1407* Vendor Administration Portal
You can use this portal to maintain your company details, documents and employee information.



My Invoice Dashboard

Welcome to your Invoice Dashboard!

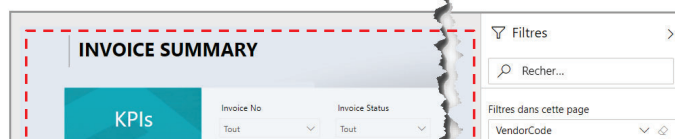
Please click on Upload Invoice to submit an invoice for payment directly to AP.

The table below provides the AP status of any invoices that have been submitted.

Note that listed invoice information reflects what values AP have entered against your invoice. E.g. PO updated after instructions from Branch staff, incorrect GST value updated etc.

Please contact the Accounts Payable team utilising the messaging function to raise any queries.

2 Upload Invoice



Vendor Invoice Upload History

To submit a new invoice to the Accounts Payable team, please click on the Upload New invoice button.

Below is record of all invoices and associated details that has been previously submitted. To view a copy of the invoice attachment or to contact the Accounts Payable team directly, please click on the drop down arrow to the right of each line.

[Back To Dashboard](#) [Upload New Invoice](#)

3


Vendor Account	Party Number (Vendor Account)	Vendor Invoice Date	Vendor Invoice Number	Vendor Invoice PO #	Vendor Invoice Total Amount	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	05/08/2020	2773399	10011851	\$249.27	\$22.66	Invoice	10/08/2020 09:13 AM

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4. Use the **Magnifying glass** to select the **Legal Entity** (make sure to pick the correct one)
5. Input the **PO Number** (only numbers, no letters)
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.

 **Only one attachment can be submitted per invoice submission** with maximum file size of 10MB.

PDF is Programmed's **preferred** file type for all invoices.

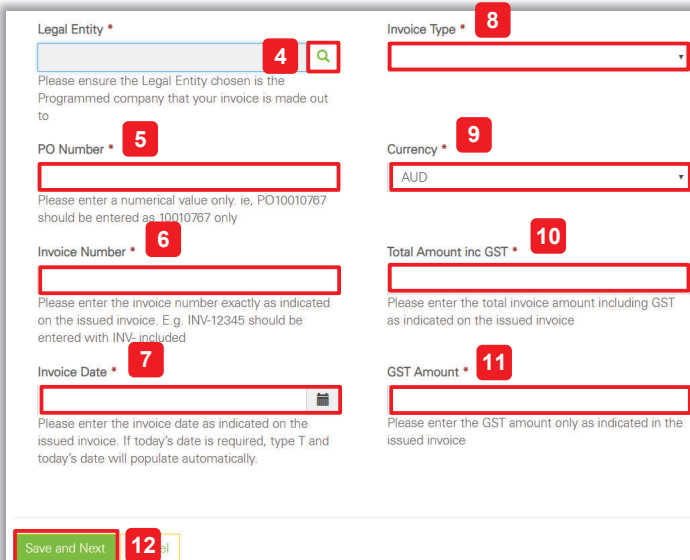
13. In the **Add Documents** section, click **+Add files**
14. Click **Choose Files**
15. Select the relevant document on your computer and click **Open**

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.

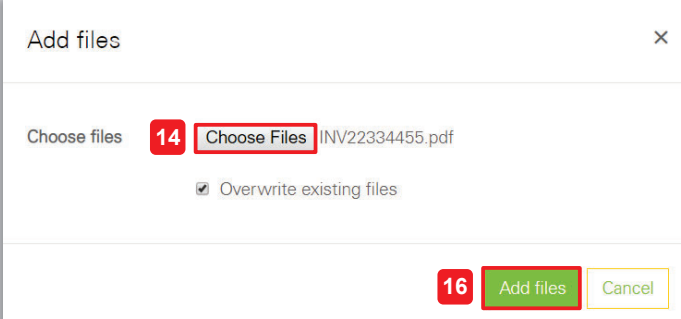
17. Click **Save and Complete** to submit the invoice to the AP team or click **Save and New** if you want



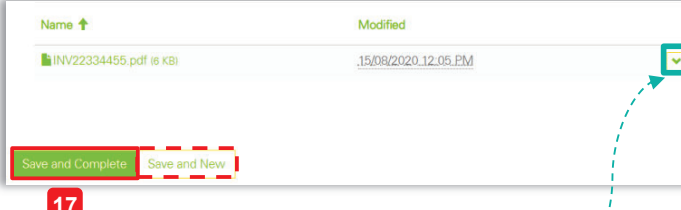
The screenshot shows the 'Legal Entity' form with the following fields and callouts: 4. Legal Entity (with a magnifying glass icon), 5. PO Number, 6. Invoice Number, 7. Invoice Date (with a calendar icon), 8. Invoice Type, 9. Currency (set to AUD), 10. Total Amount inc GST, and 11. GST Amount. A 'Save and Next' button is at the bottom with callout 12.

Add Documents

13 



The 'Add files' dialog box shows a 'Choose files' button with callout 14, a file named 'INV22334455.pdf', and a checked 'Overwrite existing files' option. At the bottom, there is an 'Add files' button with callout 16 and a 'Cancel' button.



The screenshot shows a table with columns 'Name' and 'Modified'. A single row contains the file 'INV22334455.pdf (6 KB)' and the modification time '15/08/2020 12:05 PM'. A drop-down icon is visible next to the file name. Below the table are 'Save and Complete' and 'Save and New' buttons. Callout 17 points to the drop-down icon.



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.

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to add an additional invoice / credit note.

RESULT: Once submitted, a confirmation will be sent to your registered email address.

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.

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.

Vendor Account	Party Number. (Vendor Account)	Vendor Invoice Date	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	03/08/2020	\$15.00	Invoice	19/08/2020
Prash Test 1407	A004577	02/08/2020	\$30.00	Invoice	

View details

Legal Entity	Invoice Type
PPSA	Invoice
PO Number	Currency
10011884	AUD
Invoice Number	Total Amount inc GST
SIT043A_TC201 BF	\$165.00

Vendor Account	Party Number. (Vendor Account)	Vendor Invoice Date	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	03/08/2020	\$15.00	Invoice	19/08/2020
Prash Test 1407	A004577	02/08/2020	\$30.00	Invoice	

Send Message

Legal Entity
PPSA

To Email
ppsaccounts payable@programmed.com.au


Message

Send Message

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 Information**
2. Click on **Add Employee**
3. Fill in the mandatory fields (indicated with a *)
4. Click on **Enable Portal Access**

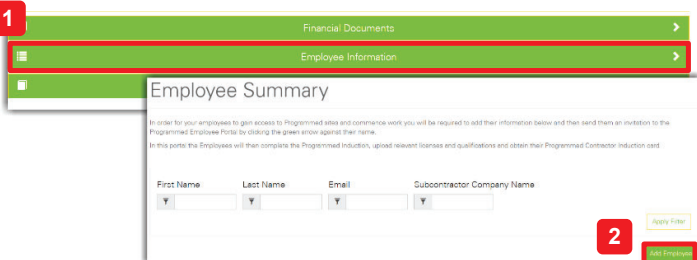
 Employees who will be working with Programmed need to undertake the Programmed Induction through the portal and will require you to **Enable Portal Access**. Once access has been granted to an employee it cannot be removed from here. For steps on how to remove them, please refer to subsequent sections.

5. Click on **Add Employee**

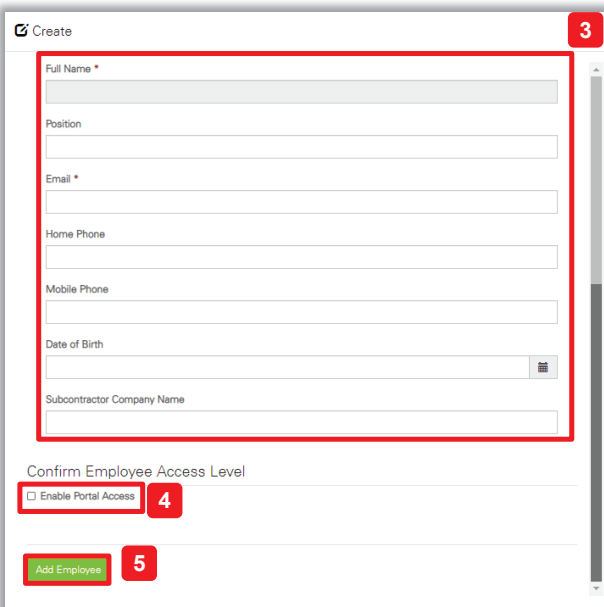
RESULT: The employee will be created and displayed on the Employee Summary page.

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

 Once you click on **Add 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.



The screenshot shows the Vendor Portal interface. A red box labeled '1' highlights the 'Employee Information' menu item in the top navigation bar. Below it, the 'Employee Summary' page is displayed. A red box labeled '2' highlights the 'Add Employee' button in the bottom right corner of the Employee Summary page.



The screenshot shows the 'Create' employee form. A red box labeled '3' highlights the form fields, which include: Full Name *, Position, Email *, Home Phone, Mobile Phone, Date of Birth, and Subcontractor Company Name. Below the form, a red box labeled '4' highlights the 'Enable Portal Access' checkbox. At the bottom, a red box labeled '5' highlights the 'Add Employee' button.

5.2 Upload Qualification Evidences for your Employee

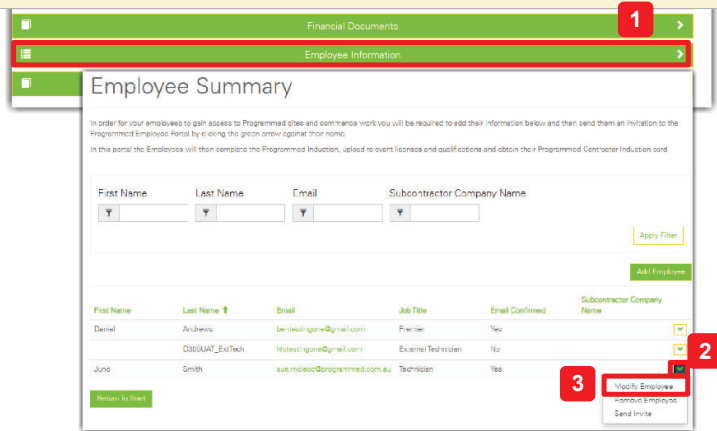
As a Vendor Administrator, you can upload qualification evidences on behalf of your employees:

1. On the Vendor Portal home page, click on **Employee 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. Click on **Add Qualification**
5. Fill in the **mandatory fields**
6. Click on **Choose file**
7. Select the document you would like to upload from your computer
8. Click on **Open**
9. Click on **Add Qualification**

RESULT: The document displays on the page.

10. Click on **Save Changes**

RESULT: The documents will be uploaded on the **Vendor Portal** and will be available to the employee when they log into the portal, under **My Qualifications** section.



Financial Documents

Employee Information

Employee Summary

In order for your employees to gain access to Programmed sites and commence work you will be required to add their information below and then send them an invitation to the Programmed Employee Portal by clicking the green arrow (signature) icon below. In this portal the Employees will then complete the Programmed Induction, upload relevant license and qualifications and obtain the Programmed Competence Induction card.

First Name	Last Name	Email	Subcontractor Company Name
▼	▼	▼	▼

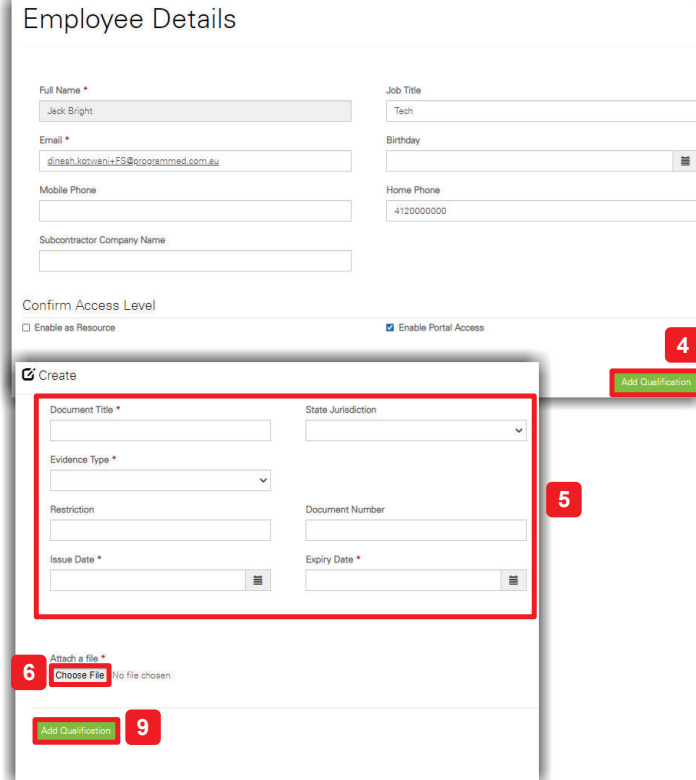
Apply Filter

Add Employee

First Name	Last Name	Email	Job Title	Email Confirmed	Subcontractor Company Name
Daniel	Andrews	daniel@programmed.com.au	Printer	Yes	▼
DANIEL	Andrews	daniel@programmed.com.au	Printer	Yes	▼
June	Smith	june.smith@programmed.com.au	Technician	Yes	▼

Modify Employee

Send Invite



Employee Details

Full Name *

Jack Bright

Job Title

Tech

Email *

daniel@programmed.com.au

Birthday

4/12/2000

Mobile Phone

4120000000

Home Phone

4120000000

Subcontractor Company Name

Confirm Access Level

☐ Enable as Resource ☒ Enable Portal Access

Create

Document Title *

State Jurisdiction

Evidence Type *

Restriction

Document Number

Issue Date *

Expiry Date *

Attach a file *

Choose File

No file chosen

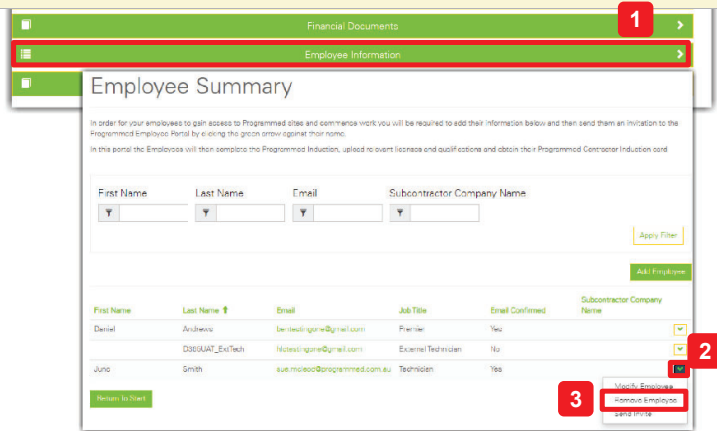
Add Qualification

5.3 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 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.



The screenshot shows the 'Employee Summary' page. At the top, there are tabs for 'Financial Documents' and 'Employee Information'. The 'Employee Information' tab is selected. Below the tabs, there is a section for 'Employee Summary' with a form to add new employees. Below the form is a table of existing employees. The table has columns: First Name, Last Name, Email, Job Title, Email Confirmed, and Subcontractor Company Name. The table contains two rows of data. The first row is for 'Daniel Andrews' with email 'daniel.andrews@programmed.com.au' and job title 'Premier'. The second row is for 'Juno Smith' with email 'juno.smith@programmed.com.au' and job title 'Technician'. A dropdown menu is open next to the 'Daniel Andrews' row, showing options: 'Verify Employee', 'Remove Employee', and 'Send Invite'. A red box highlights the 'Remove Employee' option. Red numbers 1, 2, and 3 are placed on the screenshot to indicate the steps: 1 points to the 'Employee Information' tab, 2 points to the dropdown arrow next to 'Daniel Andrews', and 3 points to the 'Remove Employee' option in the dropdown menu.

First Name	Last Name	Email	Job Title	Email Confirmed	Subcontractor Company Name
Daniel	Andrews	daniel.andrews@programmed.com.au	Premier	Yes	
Juno	Smith	juno.smith@programmed.com.au	Technician	Yes	

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

- PMS.Procurement@programmed.com.au
- pfmwvm@programmed.com.au- For PFM WA vendors

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?

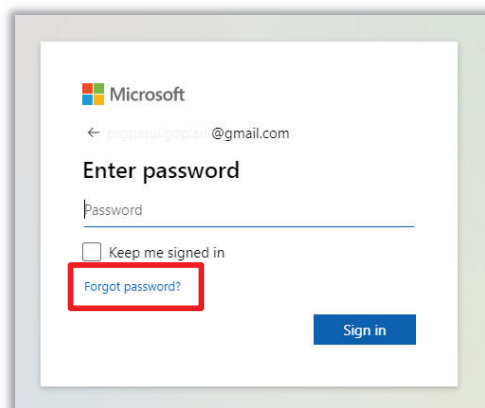
Sometimes, the previously used websites leave a trail that blocks new websites from being opened. This may need to be cleared so that the Vendor Portal displays. It is also recommended to close all the open websites on the device when completing this process of clearing history and cache.

- 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.