



# Supplier Portal - Dealing with Orders



**Step One**  
Select the Orders tab on the landing page


Click here for  
'Orders' tab



Configure PO Delivery

# Purchase Orders

## Instructions From Customer

For More information and Quick Tutorial videos please go to <http://www.firstport.co.uk/about-us/contractors-and-suppliers/purchase-to-pay>

Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
<a href="#">1012680</a>	02/02/2021	Issued	None	PM-WO-DRYRUNXW901 E2E - Service Description fir... PM-WO-DRYRUNXW901 E2E - Service	No	160.00 GBP		 

# Step Two

Select the correct PO number

from a Purchase Order

View All Search									
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions	
<a href="#">1012593</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - description Nam...	No	160.00 GBP			
<a href="#">1012592</a>	13/01/2021	Issued		RYRUNXW686 E2E - scription fir... RYRUNXW686 E2E - Service Description Nam...	No	195.00 GBP			
<a href="#">1012542</a>	19/11/2020	Issued	None	Test WO	No	100.00 GBP			
<a href="#">1012539</a>	18/11/2020	Issued	None	internal door broken - has been kicked open - h...	No	60.00 GBP			
<a href="#">1012533</a>	18/11/2020	Cancelled	None	Access 1st floor needs cleaning	No	500.00			

Click your chosen PO number

# Step Three The Order Page

Select Customer  ▾  
[Configure PO Delivery](#)

Purchase Order #1012592 | Revision  ▾

**Status** Issued - Sent via Email  
**Order Date** 13/01/2021  
**Revision Date** 13/01/2021  
**Requester** Mike Davies  
**Email** mike.davies@firstport.co.uk  
**Payment Term** END1M  
**\* Type** Planned  
**\* Urgency** n/a - Planned Order  
**Start Date** None  
**End Date** None  
**In Progress?** No  
**Asbestos** No  
**Attachments** None

## Shipping

**Ship-To Address** 12591 Upgrade street  
12591 Upgrade street2  
San Mateo, CA 11111  
United States  
Attn: Mike Davies

**Tax Registration** VAT1111

**Hazard** THERE IS ASBESTOS ON THIS SITE: If there is any likelihood that the works being carried out will disturb asbestos on site then the asbestos survey must be sent to the contractor before the works commence.

**Compliance Surveys** [63099\\_-\\_Asbestos\\_Reinspection\\_-\\_13.06.2017.pdf](#)

**Terms** DDP

At the top of the page you will find the general order information



1	Type	Item	Price	Total	Invoiced
		PM-WO-DRYRUNXW899 E2E - Service Description first hour reactive Plumbing	80.00	80.00	80.00

## Step Four

### Find the Order Line information

Commodity

#### Status Update

Updates YPO

#### Next Visit Date

#### Status Comments

Scroll to mid page to find the order line information

2	Type	Item	Price	Total	Invoiced
		PM-WO-DRYRUNXW899 E2E - Service Description Name Example	80.00	80.00	80.00

Need By	Part Number	Manufacturer Name	Manufacturer Part Number	CIS Commodity
24/09/2020	None	None	None	No

# Step Five

Find the function tabs and order history

Total GBP **160.00**

Create Invoice

Edit Change

Save

 Print View

 Comments ▼

Enter Comment

Scroll to the bottom of the page to find the Function tabs, posted comments and order history

Add Comment

 History >

# Step Six

## Adding Comments


Total GBP **160.00**

Create Invoice

Edit Change

Save

 Print View

 Comment

Enter Comment

Can you confirm the door that needs fixing on floor 2?

Comments are free-text fields. Click 'Add Comment' when complete

Add Comment

Participants:: Supplier User



Supplier User

test comment

Previous comments and replies will be listed below

On 27/02/2021 at 06:39

 Send a support request

**Step Seven**  
Check PO cost &, if you agree, Select Gold Coins to raise invoice

Purchase Orders


Select Customer







FirstPort ▾

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Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Acknowledged	Description	Unanswered Comments	Total	Assigned To	Actions
1012593	13/01/2021	Issued	None		No	160.00 GBP		 
1012592	13/01/2021	Issued	None	PM-WO-DRYPLINXW686.E2E Service De PM-WO-D Service De	No	195.00 GBP		 
1012542	19/11/2020	Issued	None	Test WO		100.00 GBP		 

If you agree with the PO cost, click the gold coins to begin the invoicing process

If numbers don't agree go to Step Seven (a)



# Step Seven (a)

## Click PO number to begin Submit Change Request process


Select Customer





FirstPort ▾

Configure PO Delivery

### Instructions From Customer

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Click the  Action to Invoice from a Purchase Order

PO Number	Order Date	Status	Comments	Service Description Name	Unanswered Comments	Total	Assigned To	Actions
<a href="#">1012593</a>	13/01/2021	Issued		W687 E2E - fir...	No	160.00 GBP		 
<a href="#">1012592</a>	13/01/2021	Issued	None	PM-WO-DRYR Service Descr PM-WO-DRYF Service Descr				 
<a href="#">1012542</a>	19/11/2020	Issued	None	Test WO				
<a href="#">1012539</a>	18/11/2020	Issued	None	internal door b open - h...				
<a href="#">1012532</a>	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		

To amend the PO cost click on the PO number to begin the process

You will not be able to send an invoice higher than the PO price. You need to submit a change request to the PO and await approval before submitting your invoice

Please see the 'Submit a Change Request' process guide for more information

# Step Eight

## Check pending changes to the order

Catalogues

Business Performance

Sourcing

Orders

Order lines

Returns

Order Changes

Order Line Changes

Deliveries

Select Custom

The yellow information bar at the top of the page will show outstanding actions

Delivery

## Purchase Order #1012680

There is a pending change request on this purchase order. [Click to view pending change](#)

**Status** Issued - Sent via Email

**Order Date** 02/02/2021

**Revision Date** 02/02/2021

**Requester** Mike Davies

**Email** mike.davies@firstport.co.uk

### Shipping

**Ship-To Address** 12591 Upgrade street  
12591 Upgrade street2  
San Mateo, CA 11111  
United States  
Attn: Mike Davies

# Step Nine

Find the Invoice for the order

Search  Sort by Line Number: 0 → 9

Price	Total	Invoiced
80.00	80.00	<a href="#">80.00</a>

PM-WO-DRYRUNXW901 E2E - Service  
Description first hour reactive Plumbing

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Need By	Part Number	Manufacturer Name	Manufacturer Part Number	CIS Commodity
24/09/2020	None	None	None	No

Status Update:  Updates YPO

Next Visit Date:  dd/mm/yyyy

Status Comments:

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Type	Item	Price	Total	Invoiced
	PM-WO-DRYRUNXW901 E2E - Service Description Name Example	80.00	80.00	<a href="#">80.00</a>

To find the invoice that applies to each item click on the blue hyperlink

**Step Ten**  
Check the invoice for the order

Select Customer

FirstPort ▾

Configure PO Delivery

## Invoices

Create Invoices i

Create Invoice from PO

Create Blank Invoice

Create Credit Note

The invoices linked to this PO will be itemised here

Export to ▾ View All ▾

Invoice #	Created Date	Status	PO #	Gross Total	Unanswered Comments	Dispute reason	Actions
<a href="#">MD12345</a>	26/02/2021	Pending Approval	<a href="#">1012680</a>	192.00 GBP	No		
<a href="#">MD 200</a>	11/02/2021	Pending Approval	<a href="#">1012680</a>	160.00 GBP	No		