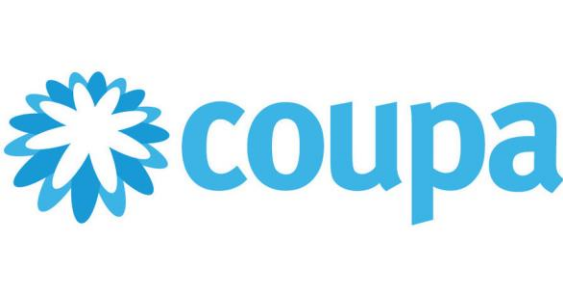




# Supplier Portal - Dealing with Orders



On the Landing page select "Orders" to go to your list of received orders


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









Select Customer FirstPort ▼

[Configure PO Delivery](#)

**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

View All <input type="text" value="Search"/>									
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions	
1012593	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - Service Description Nam...	No	160.00 GBP		 	
1012592	13/01/2021	Issued	None	PM-WO-DRYRUNXW686 E2E - Service Description fir... PM-WO-DRYRUNXW686 E2E - Service Description Nam...	No	195.00 GBP		 	
1012542	19/11/2020	Issued	None	Test WO	No	100.00 GBP		 	
1012539	18/11/2020	Issued	None	internal door broken - has been kicked open - h...	No	60.00 GBP		 	
1012532	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00			

 Send a support request

# Step Two

## Selecting the order

Select Customer

FirstPort ▾









Configure PO Delivery


On the Orders page select any blue PO Number to open it up

### 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="#">1012593</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - Service Description Nam...	No	160.00 GBP		 
<a href="#">1012592</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW686 E2E - Service Description fir... PM-WO-DRYRUNXW686 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="#">1012532</a>	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		

 Send a support request

# Step Three The Order Page

Select Customer FirstPort  
Configure PO Delivery

Purchase Order #1012592 | Revision 2 (Current) 13 Jan

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

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  
Acknowledged

## 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



1	Type	Item	Price	Total	Invoiced
		PM-WO-DRYRUNXW899 E2E - Service	80.00	80.00	80.00

## Step Four

### Find the Order Line information

Commodity

#### Status Update

#### Next Visit Date

#### Status Comments

Updates YPO

Scroll to mid page to find the order line information

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

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

Total GBP 160.00

## Step Five

Find the function tabs and order history

Price

Edit Change

Save

Print View

0 Comments

Enter Comment

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

Add Comment

History

Total GBP 160.00

## Step Six Adding Comments

oice

Edit Change

Save

Print View

### 1 Comment

#### Enter Comment

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

To post a comment,  
type in what you  
want to say and click  
"Add Comment"

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

## Invoicing if you agree with the PO cost


Select Customer











FirstPort

Configure PO Delivery

### 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
1012593	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E -	No	160.00		 
1012592	13/01/2021	Issued	None		No	195.00 GBP		 
1012542	19/11/2020	Issued	None		No	100.00 GBP		 
1012539	18/11/2020	Issued	None	Internal door broken - has been replaced	No	60.00 GBP		 
1012532	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		 

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

Send a support request



# Step Eight


## Invoicing if you need to amend the PO cost









Select Customer

[Configure PO Delivery](#)

### 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="#">1012593</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E -	No	160.00 GBP		 
<a href="#">1012592</a>	13/01/2021	Issued	None		No	195.00 GBP		 
<a href="#">1012542</a>	19/11/2020	Issued	None		No	100.00 GBP		 
<a href="#">1012539</a>	18/11/2020	Issued	None	Internal door broken - has been replaced	No	60.00 GBP		 
<a href="#">1012532</a>	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		

If you need to amend the PO cost click on the PO number to begin the "Submit Change Request" process

Do you need to modify the invoice price? You will not be able to send an invoice that is higher than the PO price. You will need to submit a change request to the PO and await the approval for the increased price before you can submit your invoice

 Send a support request

# Step nine

## Finding pending changes to the order

The yellow information bar will tell you what outstanding actions are pending on your order

Select Customer

FirstPort

Configure PO 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

**Payment Term** END1M

**\* Type** Planned

## 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 o

# Step Ten

## Finding the invoice for the order

Price	Total	Invoiced
80.00	80.00	80.00

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

Status Update

Next Visit Date

Status Comments

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

Type	Item	Price	Total	Invoiced
	PM-WO-DRYRUNXW901 E2E - Service Description Name Example	80.00	80.00	80.00

**Step Eleven**  
Checking the invoice for the order

Select Customer  ▼

# Invoices

Create Invoices i

The invoices linked to this PO will be itemised here

Export to ▼ View  ▼

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		

# Step Twelve

## Acknowledging orders

Select Customer


FirstPort









Configure PO Delivery

On the Orders page select any blue PO Number to open it up

**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="#">1012593</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - Service Description Nam...	No	160.00 GBP		 
<a href="#">1012592</a>	13/01/2021	Issued	None	PM-WO-DRYRUNXW686 E2E - Service Description fir... PM-WO-DRYRUNXW686 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="#">1012532</a>	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		

 Send a support request

# Step Thirteen Acknowledging an order

Select Customer

FirstPort

Configure PO Delivery

Status Closed - Sent via Email

Order Date 02/02/2021

Revision Date 02/02/2021

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

Acknowledged

Assigned to

## 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:  
any likelihood that the works being carried out will  
disturb asbestos on site then the asbestos must be sent to the contractor before  
commence.

Compliance Surveys 63099

Acknowledge the order to show you have accepted it

# Step Fourteen

## Updating actions on orders

Select Customer


FirstPort ▾









Configure PO Delivery

On the Orders page select any blue PO Number to open it up

**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
1012593	13/01/2021	Issued	None	PM-WO-DRYRUNXW687 E2E - Service Description fir... PM-WO-DRYRUNXW687 E2E - Service Description Nam...	No	160.00 GBP		 
1012592	13/01/2021	Issued	None	PM-WO-DRYRUNXW686 E2E - Service Description fir... PM-WO-DRYRUNXW686 E2E - Service Description Nam...	No	195.00 GBP		 
1012542	19/11/2020	Issued	None	Test WO	No	100.00 GBP		 
1012539	18/11/2020	Issued	None	internal door broken - has been kicked open - h...	No	60.00 GBP		 
1012532	18/11/2020	Cancelled	None	floor on 1st floor needs cleaning - some	No	500.00		

 Send a support request

Acknowledged

Assigned to

Select

Lines

Advanced

Search



Sort by

Line Number: 0 → 9



# Step Fifteen

## Confirm Job status and adding in upcoming actions

Click the dropdown arrow and update the job status here

Add in next visit date and any comments here

24/09/2020 None None None No

### Status Update

- Job Accepted
- Job Delayed: Awaiting contact from resident
- Job Delayed: Parts Required
- Job Delayed: Progress Update
- Job Delayed: Staff Availability
- Job Delayed: Weather Conditions
- Reactive Job Completed
- Planned Contract Completed
- Job Rejected

### Next Visit Date

dd/mm/yyyy

### Status Comments

Price	Total	Invoiced
80.00	80.00	80.00

PM-WO-DRYRUNXW901 E2E - Service  
Description Name Example

Need By	Part Number	Manufacturer Name	Manufacturer Part Number	CIS Commodity
24/09/2020	None	None	None	M-

### Status Update

Updates YPO

### Next Visit Date

dd/mm/yyyy

### Status Comments



24/09/2020 None None None No

**Status Update**

Job Delayed: Parts Required

**Next Visit Date**

26/03/2021

**Status Comments**

Part coming from Germany

Updates YPO

# Step Twelve

## Confirming upcoming actions

Invoiced

80.00

FWO-DKTRONXW90TEZE - Service

Description Name Example

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

**Status Update**

Job Delayed: Weather Conditions

**Next Visit Date**

26/03/2021

**Status Comments**

Not able to access roof due to wind

Updates YPO

Updates show here

Confirm updates by selecting "Save"

Per page 15 | 45 | 90

Total GBP **160.00**