



PROACTIS: Supplier User Guide

Invoicing

- Introduction
- Why PROACTIS
- Invoice Management
 - Invoice Notification
 - Viewing an Invoice
 - Acknowledging invoices
 - Accepting invoices
 - Rejecting invoices.
 - Tabs: Acknowledgements and Invoices
- PROACTIS Supplier Manuals

This manual is intended for all existing Supplier Network users

Instructions are provided on how manage the invoice process within the Supplier Network

Please familiarise yourself with the manual prior to using invoices within the Supplier Network

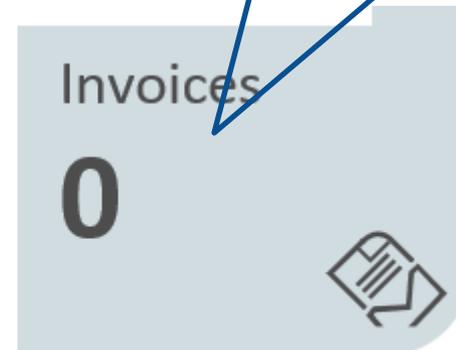
- The PROACTIS Supplier Network is very easy to use
- You can self register, maintain your own data and downloaded documents
- Submit tender responses electronically 24 hours a day, 7 days a week
- Tenders lodged electronically do not incur postage or courier costs
- You receive automatic confirmation that your response has been received
- You can search the database for awarded contracts as a means of identifying potential business leads

Invoice Management

Your supplier dashboard will allow you to manage proposed Invoices from your Customers, including acknowledging, accepting and rejecting invoices.



From the two options you can filter proposed invoice types presented. The views include Un invoiced , Part-Invoiced (Visible but Coillte do not use), Full invoiced, Deleted Orders and All Orders.



Invoice Notification

You will be notified by email that a new invoice has been created by Coillte.

The following steps explain the process of viewing, acknowledging, accepting or rejecting an invoice.

Viewing an invoice

Copy / type the link into your internet browser

<https://www.proactisplaza.com/SupplierPortal/?CID=coillte>

To enter the PROACTIS Supplier Portal

Feel free to
view Public
Opportunities



Sign In

Organisation ID

Login Name

Password

[Forgotten login details?](#)

[Sign In](#)

Don't have an account? [Sign up](#)

Have you been invited?

Access Code

[Go](#)

coillte

[View Opportunities](#)

Powered by **PROACTIS**
The Spend Control Company

[FAQs](#) | [Cookie Policy](#) | [Legal](#) | [Help](#) | [Contact Us](#)

Viewing an invoice

Step One: Sign In

Step One requires you to sign into the Supplier Portal



The screenshot shows the coillce website's sign-in interface. On the left, there is a 'Sign In' form with fields for 'Organisation ID', 'Login Name', and 'Password'. Below these fields is a blue 'Sign In' button and a link for 'Forgotten login details?'. Below the form, there are links for 'Don't have an account? Sign up' and 'Have you been invited? Access Code' with a 'Go' button. The main content area features the coillce logo, a 'View Opportunities' button, and a graphic of several colorful arrows pointing in various directions. At the bottom, there are links for 'FAQs', 'Cookie Policy', 'Legal', 'Help', and 'Contact Us', along with the text 'Powered by PROACTIS'.



This is a close-up view of the sign-in form. It includes the following elements:

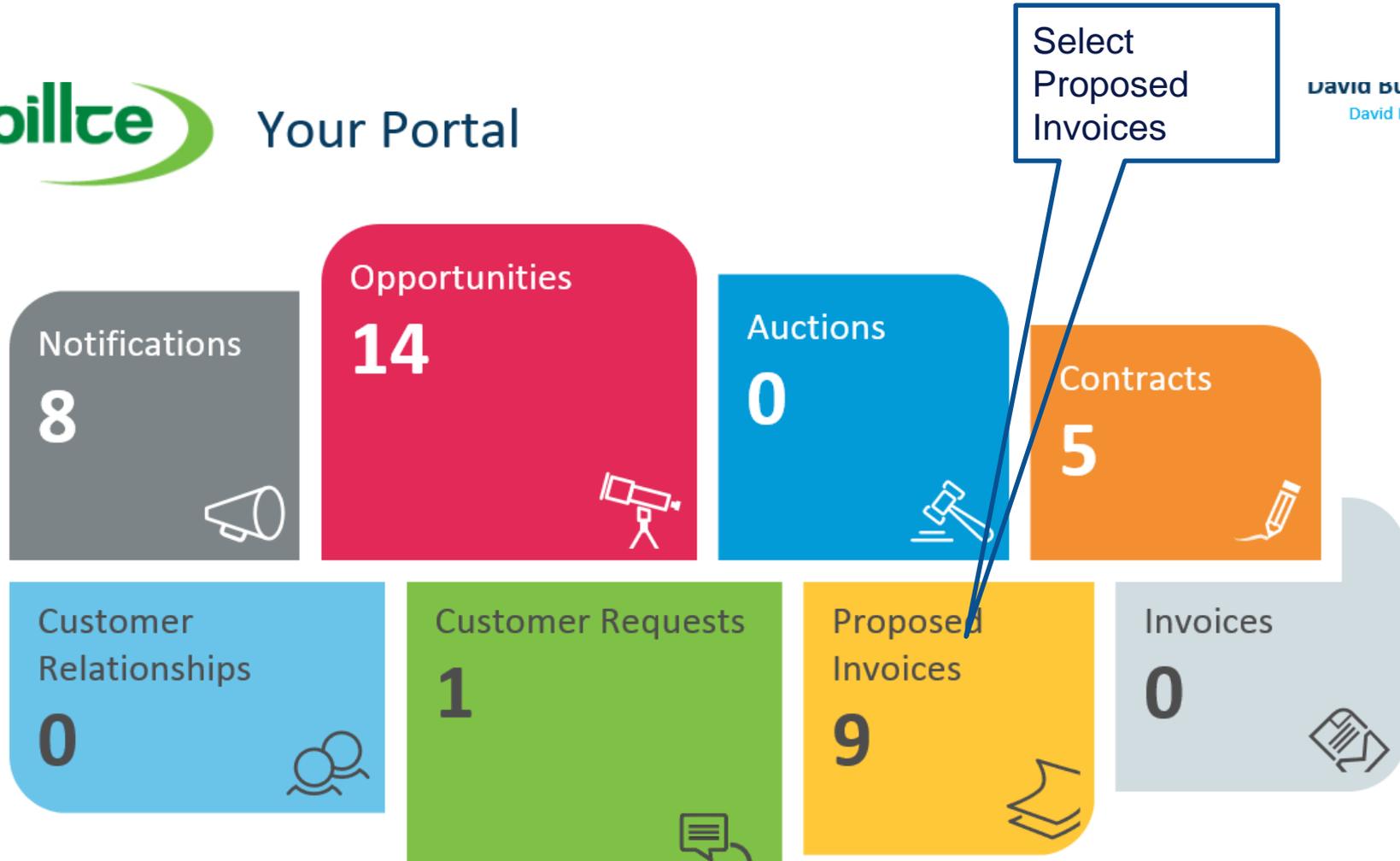
- Sign In** header
- Organisation ID** label above a text input field
- Login Name** label above a text input field
- Password** label above a text input field
- A blue button with a right-pointing arrow and the text **Sign In**
- A link for [Forgotten login details?](#)

Viewing an invoice

Step Two: View Proposed Invoices



Your Portal



David Bur
David Bu

Viewing an Invoice

Step Three: Find the invoices



Use the Filter and Search function to find the Proposed Invoices

David Burke
David Burke

From here you can view, acknowledge and invoice proposed invoices received from your customers.

Search by order number or customer name...

Order No	Order Date	Customer Name	Value	Status	Show Me
No items to display					

Filter by status or dates and / or enter key words

Start Date 18/11/2014 **End Date** 18/12/2014

Order Status
Uninvoiced
Uninvoiced
Part invoiced
Fully invoiced
Deleted
All proposed invoices

Order No	Order Date	Customer Name	Value	Status	Show Me
No items to display					

Viewing an Invoice

Step Four: Select the proposed Invoice

Select 'Show Me' to view the proposed invoice

Start Date 18/06/2014 	End Date 18/12/2014 	Order Status All proposed invoices ▼
---	---	--

Order No	Order Date	Customer Name	Value	Status	Show Me
6056905	03 August 2014	Coillte	1,200.00	Fully invoiced	

Viewing an Invoice

Step Five: View the Proposed invoice



Your Purchase Order | [6056905](#)

▼ Acknowledgement

📄 New Invoice

✕ Delete

🖨️ Print

David Burke ▼
David Burke

The proposed Invoice is displayed on screen

From here you can view the purchase order details below, or process it using the options above.

Delivery Information

Delivery Address	Delivery Contact	Customer Name	Order Date	Status
-	-	Coillte	03 August 2014	Fully Invoiced

Item Information

Part #	Description	Quantity	UOM	Price	Net Value	VAT
613 00 WX09	Dry/Reps (VAT ON THIS SUPPLY TO BE ACCOUNTED FOR BY THE PRINCIPAL CONTRACTOR)	1,000.00	1JOB	1.20	1,200.00	0.00

1 - 1 of 1 Items

Payment Information

Invoice Address	Value	1200.00
	VAT	0.00
	Order Total	1200.00

Columns can be dragged for ease of view

Invoice descriptions can be viewed

Invoice values are displayed

Acknowledging an Invoice

The Acknowledge Invoice functionality allows you to send an email to Coillte should you have any comments regarding the Invoice.



NOTE: Acknowledging the invoice does not mean that you are accepting or rejecting the invoice.

Acknowledging an Invoice

Step One: Select to Acknowledge

Select
'Acknowledgement'



Your Purchase Order | **6056905**

 Acknowledgement  New Invoice  Delete  Print

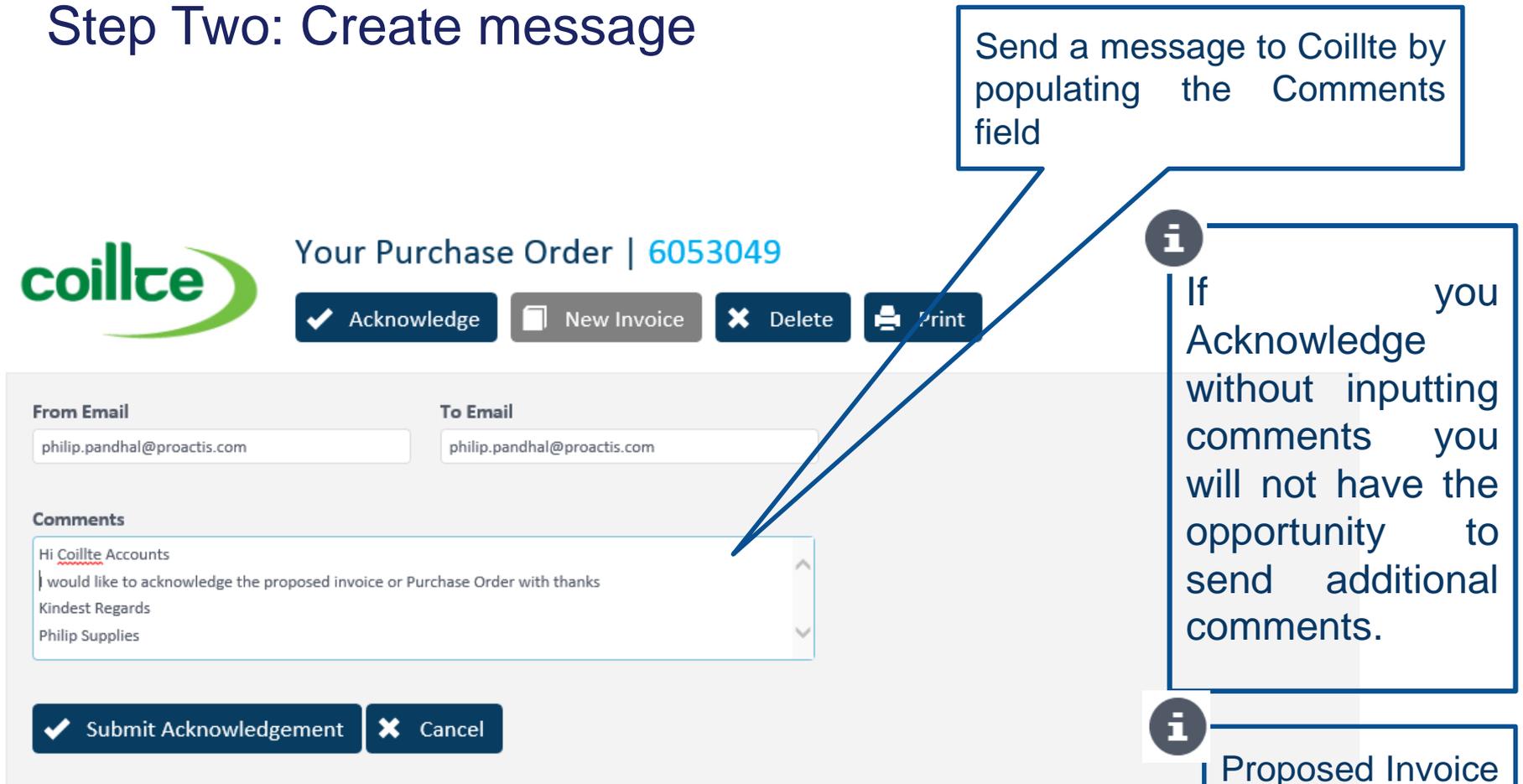
From here you can view the purchase order details below, or process it using the options above.

Delivery Information

Delivery Address	Delivery Contact	Customer Name	Order Date
-	-	Coillte	03 August 2014

Acknowledging an Invoice

Step Two: Create message



The screenshot shows the 'Acknowledge' interface for a purchase order. At the top left is the Coillte logo. The main heading is 'Your Purchase Order | 6053049'. Below this are four buttons: 'Acknowledge' (checked), 'New Invoice', 'Delete', and 'Print'. The 'From Email' and 'To Email' fields both contain 'philip.pandhal@proactis.com'. The 'Comments' field contains a pre-filled message: 'Hi Coillte Accounts', 'I would like to acknowledge the proposed invoice or Purchase Order with thanks', 'Kindest Regards', and 'Philip Supplies'. At the bottom are 'Submit Acknowledgement' and 'Cancel' buttons. Three callout boxes provide instructions: 1) 'Send a message to Coillte by populating the Comments field' points to the comments text area. 2) 'If you Acknowledge without inputting comments you will not have the opportunity to send additional comments.' points to the 'Acknowledge' button. 3) 'Proposed Invoice is displayed below' points to the table at the bottom of the page.

From here you can view the purchase order details below, or process it using the options above.

Delivery Information				
Delivery Address	Delivery Contact	Customer Name	Order Date	Status
-	-	Coillte	23 February 2014	Fully invoiced

Acknowledging an Invoice

Step Three: Submit Acknowledgement

From Email
philip.pandhal@proactis.com

To Email
philip.pandhal@proactis.com

Comments

Hi Coillte Accounts
I would like to acknowledge the proposed invoice or Purchase Order with thanks
Kindest Regards
Philip Supplies

Select 'Submit Acknowledgement'

i Please note: You can only acknowledge the invoice once.

Acknowledging an Invoice

Step Four: Order Acknowledgement

Order Acknowledgement is displayed on screen



Your Purchase Order | 6056905

▼ Acknowledgement

📄 New Invoice

✕ Delete

🖨️ Print

From here you can view the purchase order details below, or process it using the options above.



David Burke 
David Burke
Order acknowledged successfully



Coillte will then be able to respond to the acknowledgement with clarification, this will be via email.

Accepting an Invoice

Once you have Acknowledged an Invoice you are then in a position to either Accept or Reject an invoice

To Accept please select 'New Invoice'



Your Purchase Order | [6053047](#)

David Burke 
David Burke

-  Acknowledgement
-  New Invoice
-  Delete
-  Print

From here you can view the purchase order details below, or process it using the options above.

Delivery Information				
Delivery Address	Delivery Contact	Customer Name	Order Date	Status
	-	Coillte	23 February 2014	Uninvoiced

Item Information							
Part #	Description	Quantity	UOM	Price	Net Value	VAT	
682 00 K23B	M&M 3+ General	10.00	Hours	2.00	20.00	2.70	
							1 - 1 of 1 Items

Payment Information		
Invoice Address	Value	20.00
	VAT	2.70
	Order Total	22.70

Accepting an Invoice



Your Invoice for Order | **6053047**

Submit Submit & Print Cancel

David Burke
David Burke

Add an invoice number

From here you can create an invoice for one or many of the purchase order lines below.

Invoice Details

Order No
6053047

Invoice Number

Customer Name
Coillte

Order Date
23 February 2014

Invoice Date

Add/Amend the invoice date

Invoice Items

Part #	Description	UOM	Order Price	Order Qty	Quantity	Net Value	VAT	Action
682 00 K23B	M&M 3+ General	Hours	2.00	10.00	10.00	20.00	2.70	

1 - 1 of 1 items

Totals

Comments

Add Comments

Net Value	20.00
VAT	2.70
Total	22.70

Accepting an Invoice

Either 'Submit' or 'Submit and Print' the invoice



Your Invoice for Order | [6053047](#)

Submit Submit & Print Cancel

Order No
6053047

Order Date
23 February 2014

Invoice Number

123344

Invoice Date

18/12/2014



Invoice Items

Part #	Description	U
682 00 K23B	M&M 3+ General	H

Navigation: [Previous] [1] [Next]

Totals

Comments

Thank you please pay asap

Regards

Philip Suppliers

Select 'Submit' New Invoice' or 'Submit & print'

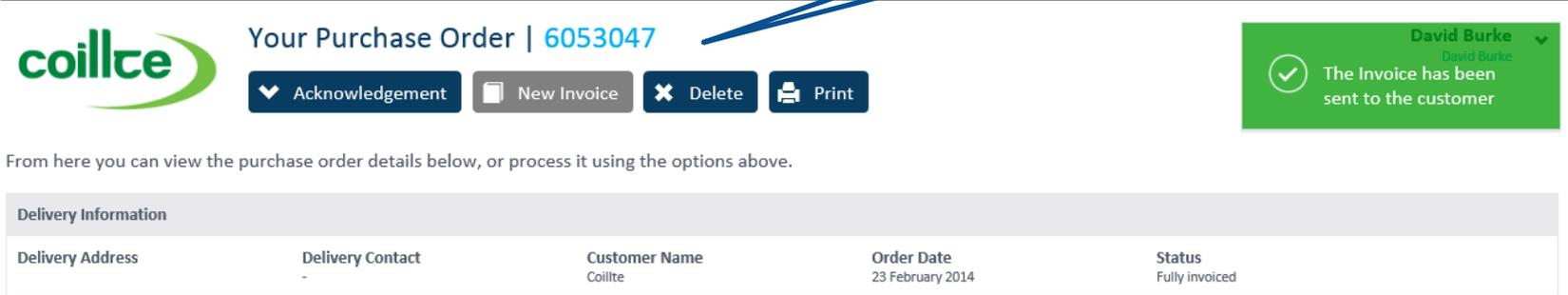
i

Please note: You cannot change any of the values on the invoice. If the values are incorrect please use the reject invoice functionality discussed later.

Accepting an Invoice

Confirmation is received

Confirmation is displayed on screen



The screenshot shows a web interface for a purchase order. At the top left is the 'coillte' logo. To its right is the text 'Your Purchase Order | 6053047'. Below this are four buttons: 'Acknowledgement' (with a dropdown arrow), 'New Invoice' (with a document icon), 'Delete' (with an 'x' icon), and 'Print' (with a printer icon). On the right side, there is a green notification box with a white checkmark icon and the text 'The Invoice has been sent to the customer'. Above this box is the name 'David Burke' with a dropdown arrow. Below the buttons, there is a line of text: 'From here you can view the purchase order details below, or process it using the options above.' At the bottom, there is a table with the following data:

Delivery Information				
Delivery Address	Delivery Contact	Customer Name	Order Date	Status
-	-	Coillte	23 February 2014	Fully invoiced

Your invoice has been accepted

Rejecting a Proposed Invoice

You may wish to reject the Invoice if the details or values are incorrect.

To delete please select 'Delete'



Your Purchase Order | [6053047](#)

David Burke 
David Burke

-  Acknowledgement
-  New Invoice
-  Delete
-  Print

From here you can view the purchase order details below, or process it using the options above.

Delivery Information				
Delivery Address	Delivery Contact	Customer Name	Order Date	Status
-	-	Coillte	23 February 2014	Uninvoiced

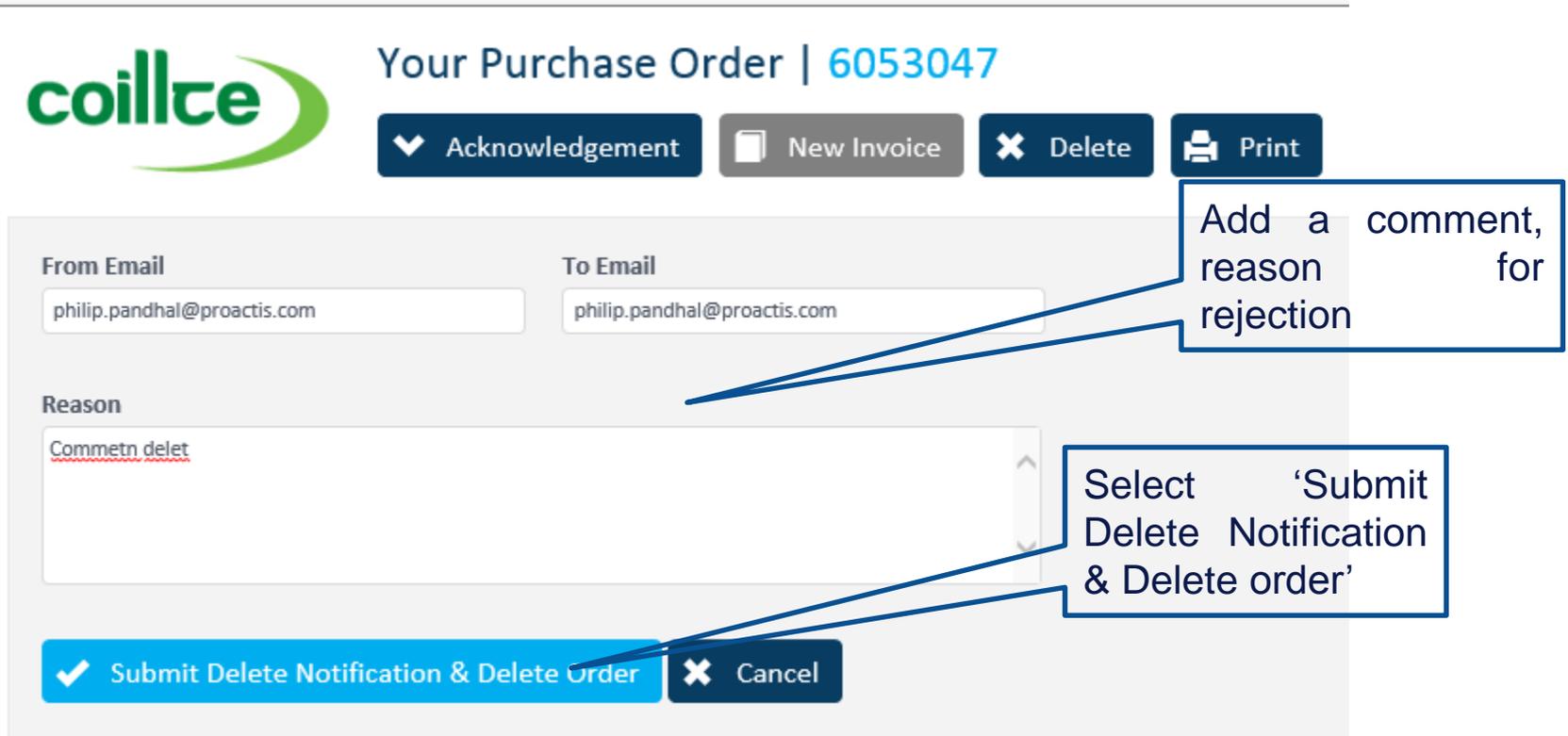
Item Information							
Part #	Description	Quantity	UOM	Price	Net Value	VAT	
682 00 K23B	M&M 3+ General	10.00	Hours	2.00	20.00	2.70	

 1 - 1 of 1 Items

Payment Information		
Invoice Address	Value	
	20.00	
	VAT	2.70
	Order Total	22.70

Rejecting a Proposed Invoice

Add a comment and Delete



coilte Your Purchase Order | 6053047

▼ Acknowledgement 📄 New Invoice ✕ Delete 🖨️ Print

From Email: philip.pandhal@proactis.com To Email: philip.pandhal@proactis.com

Reason: Commetn delet

✓ Submit Delete Notification & Delete Order ✕ Cancel

Add a comment, reason for rejection

Select 'Submit Delete Notification & Delete order'

Rejecting a Proposed Invoice

Confirmation is received



From here you can view, acknowledge and invoice proposed invoices received from your customers.

Order No	Order Date	Customer Name	Value	Status	Show Me
No items to display					

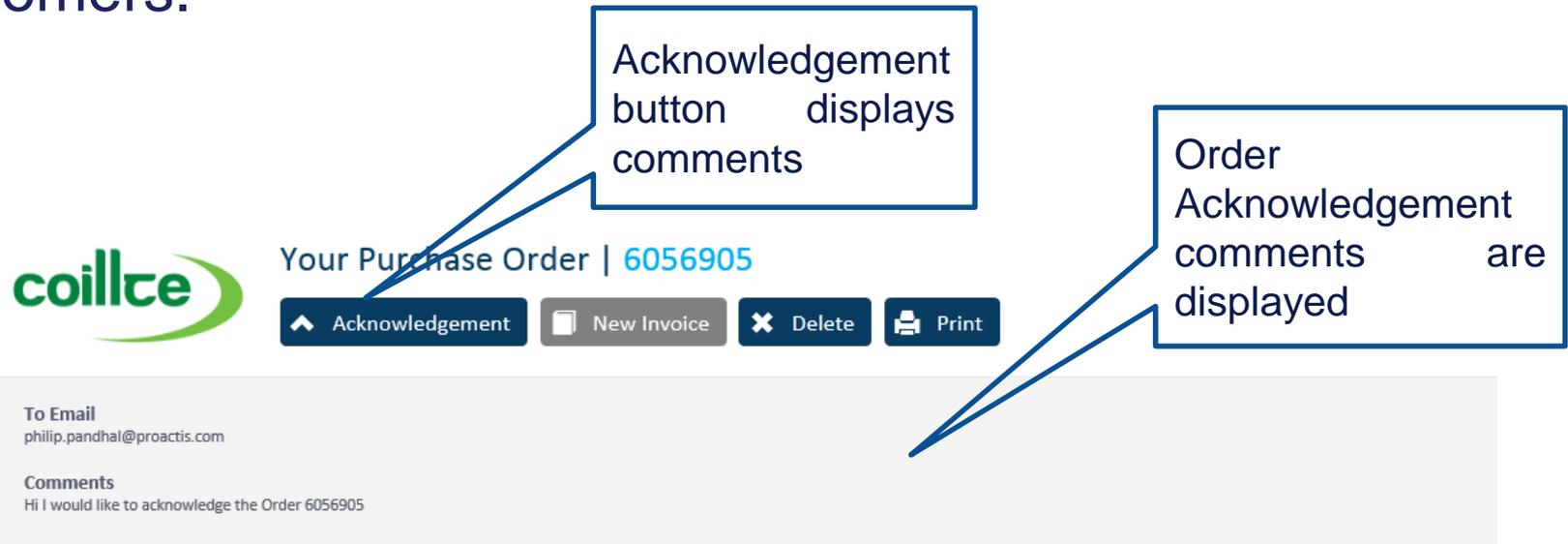
Confirmation is displayed on screen

David Burke 
✓ The order was successfully deleted

Your invoice has been rejected

Acknowledgements Button

By clicking on the acknowledgements button you will be able to view Order specific acknowledgements sent to your customers.



The screenshot shows a purchase order interface for 'coillte'. The header includes the company logo and the text 'Your Purchase Order | 6056905'. Below this are four buttons: 'Acknowledgement', 'New Invoice', 'Delete', and 'Print'. A callout box points to the 'Acknowledgement' button, stating 'Acknowledgement button displays comments'. Another callout box points to the 'Comments' section below, stating 'Order Acknowledgement comments are displayed'. The 'Comments' section contains the text: 'Hi I would like to acknowledge the Order 6056905'.

From here you can view the purchase order details below, or process it using the options above.

Delivery Information				
Delivery Address	Delivery Contact	Customer Name	Order Date	Status
-	-	Coillte	03 August 2014	Fully invoiced

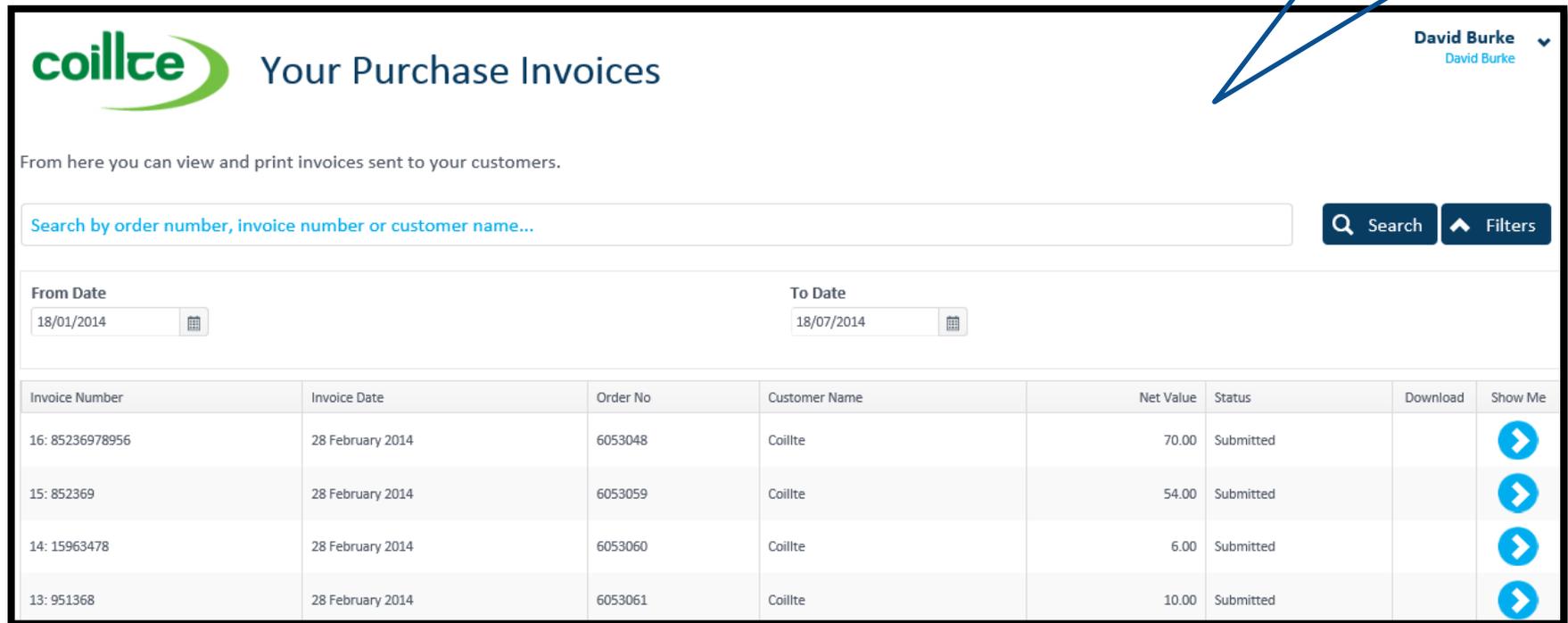
Invoices Tab

Within the Invoice tab you can view, print and resend invoices sent to your customers.

Invoices
0



Search and Filter allows for either key word search's or date searches



coillte Your Purchase Invoices

From here you can view and print invoices sent to your customers.

Search by order number, invoice number or customer name...

Search Filters

From Date: 18/01/2014 To Date: 18/07/2014

Invoice Number	Invoice Date	Order No	Customer Name	Net Value	Status	Download	Show Me
16: 85236978956	28 February 2014	6053048	Coillte	70.00	Submitted		
15: 852369	28 February 2014	6053059	Coillte	54.00	Submitted		
14: 15963478	28 February 2014	6053060	Coillte	6.00	Submitted		
13: 951368	28 February 2014	6053061	Coillte	10.00	Submitted		

David Burke
David Burke

Invoices Tab



Your Purchase Invoice | [85236978956](#)

Resend Print

Invoices can be printed

David Burke
David Burke

From here you can view details of the invoice, resend it, or print it.

Invoice Details

Order No 6053048	Invoice Number 85236978956	Customer Name Coilte
Order Date 23 February 2014	Invoice Date 28 February 2014	Currency Code
Company Registration Number -	VAT Registration Number IE5345915U	

Invoice Items

Part #	Description	UOM	Quantity	Price	Net Value	VAT
682 00 K23B	M&M 3+ General	Hours	35.00	2.00	70.00	9.45

1 - 1 of 1 Items

Invoice details are displayed

Invoices can be Resent



Your Purchase Invoice | [85236978956](#)

Resend Print

This will re-send the invoice to your customer. This may result in the invoice being received more than once by your customer. Are you sure you wish to re-send this invoice?

Resend Cancel

From here you can view details of the invoice, resend it, or print it.

Invoice Details



- Registering on the Supplier Portal (Invited by Customer)
- Registering on the Supplier Portal (Self Registration)
- Changing my Organisation details
- Registering an interest in a tender opportunity
- Responding to a tender opportunity
- Locating / Amending a tender opportunity response
- Invoice Management
- Contract Management
- Password Management (Forgot or Amend)
- Frequently Asked Questions (FAQs)