



Supplier Management System

User Guide for Contractors

July 2014

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Introduction

Coillte launched a new Supplier Management System (SMS) in 2013 to improve the way it Interacts with its Suppliers and Contractors and to provide a state of the art paperless online system which gives 24 hour access to companies who do business with Coillte . The purpose of this mini-guide is to some basic information and tips on how companies can get best use out of the system and detail how the latest enhancement of this system Contract Management will work.

Benefits of SMS

The SMS allows Suppliers online access to manage their business interactions with Coillte including :

- 24hr Self Service online access
- Register and Maintain their company details
- Upload key Documents
- Get notified automatically when Coillte tender work
- Accept and authorise Contracts electronically
- Generate electronic invoices from Contract work recorded
- Electronic Payment to your bank account

Accessing the system

You can access the Supplier Management System by clicking on the link below and full access can be found on the Coillte home page at www.coillte.ie

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

Once you log into Supplier Portal you are required to enter the following Information

- Organisation ID
- Login Name
- Password

If you have trouble accessing the system please contact the SMS Support desk in Coillte by ringing **(01) 2011171** or emailing smssupport@coillte.ie

Note there are detailed Guides available on different parts of the Supplier Management System and these can be accessed by from the Supplier Management System link on the Coillte web site

Maintaining your company details

You can update your company records by logging into your Supplier Portal and selecting the Administration tab which then gives you the Option to update your Organisation Records, user details etc.

The screenshot shows the PROACTIS Supplier Administration interface. At the top, there is a header with the date '16 May 2014', the user 'Mr Contractor, Cory Forest Harvesting Ltd', and a 'LOGOUT' link. Below the header is a navigation menu with 'Home', 'Opportunities', 'Contracts', 'Customers', 'Administration', and 'Help'. The 'Administration' section is active, showing a sidebar with 'Administration Home', 'Organisation Maintenance', 'User Maintenance', 'Document Library', 'e-Transactions', and 'Preferences'. The main content area is titled 'Supplier Administration' and contains the following text: 'Using this module you can maintain the details of your organisation and users, etc. From here you can do the following:'. Below this is a list of five links: 'Maintain your Organisation records on the Supplier Portal', 'Maintain your User records on the Supplier Portal', 'Maintain your Document Library on the Supplier Portal', 'Maintain your e-Transactions on the Supplier Portal', and 'Maintain your Preferences on how you use the Supplier Portal'. At the bottom, it says 'Use the links above or the menu options on the left to continue.'

For example if you wanted to amend your address you click on the " Maintain your Organisation Records on the Supplier Portal " option and select the Address Tab and using the Blue pencil Action key access the address details , make the necessary changes and save to update your records in both the Supplier System and the Coillte records

The screenshot shows the PROACTIS Amend Organisation Details page. At the top, there is a header with the date '16 May 2014', the user 'Mr Contractor, Cory Forest Harvesting Ltd', and a 'LOGOUT' link. Below the header is a navigation menu with 'Home', 'Opportunities', 'Contracts', 'Customers', 'Administration', and 'Help'. The 'Administration' section is active, showing a sidebar with 'Administration Home', 'Organisation Maintenance', 'User Maintenance', 'Document Library', 'e-Transactions', and 'Preferences'. The main content area is titled 'Amend Organisation Details' and contains the following text: 'This screen allows you to amend the details for your organisation.' Below this are 'Save' and 'Abandon Changes' buttons. There is a tabbed interface with 'General', 'Shop Window', 'Addresses', 'Business Info', 'What You Sell', and 'Customer Information'. The 'Addresses' tab is active, showing a table with the following data:

Address	Active	Action
Hazelwood Avenue, Daffodil Lane, Sneakerstown, Co Mayo, Eire, IRELAND	<input checked="" type="checkbox"/>	

Below the table is an 'Add Address' button. At the bottom, there are 'Save' and 'Abandon Changes' buttons.

Uploading Key Documents

The Supplier Portal contains an area for Suppliers to upload and maintain key documents including Tax Clearance Certificates, Insurance Declaration, Bank Details etc.

Click on Administration ~ Document Library ~ New Document

The screenshot shows the PROACTIS Supplier Portal interface. At the top, there is a header with the date '16 May 2014', the user 'Mr Contractor, Corry Forest Harvesting Ltd', and a 'LOGOUT' link. Below the header is a navigation menu with options: Home, Opportunities, Contracts, Customers, Administration, and Help. The 'Administration' section is active, and a sidebar on the left lists options: Administration Home, Organisation Maintenance, User Maintenance, Document Library (highlighted), e-Transactions, and Preferences. The main content area is titled 'List of Documents' and contains the following text: 'From here you can view and amend the Documents held in your Document Library. By maintaining your documents centrally, it will be easier when you are responding to Buyers on Opportunities or Trading Relationships.' Below this text is a 'New Document' button and a 'View:' section with a dropdown menu set to 'All Documents', a 'Go' button, and an 'Advanced Search' button. A table lists the documents in the library:

Document Type	Title	Upload Date	Expiry Date	Visible To All Buyers	Action
Employers Liability Insurance Certificate	Insurance Declaration	16/05/2014 16:18	30/04/2015	Yes	
Generic Documents	Tax Clearance Certificate 2014/2015	16/05/2014 16:17	31/03/2015	Yes	

Browse your System to find where you have saved your document and select the document type you are saving, enter a brief description and the expiry date for that document and click on Visible to all buyers box

The screenshot shows the 'Add Document' dialog box with the 'Upload Document' tab selected. The instructions are: 'Locate and upload the appropriate document.' The form contains the following fields:

- Filename:** \\Filesvr1\users1\corry_s\My Documents\A scanned File\Hinch PH Insurance.pdf (with a 'Browse...' button)
- Document Type:** Employers Liability Insurance Certificate (dropdown menu)
- Description:** Insurance Declaration 2014 (text area)
- Expiry Date:** 31/12/2014 (calendar icon)
- Visible To All Buyers?

At the bottom right, there are 'OK' and 'Cancel' buttons.

This document is now saved in your document library and available for you and Coillte to view and update their records to avoid any delays in contract signing, payments etc.

Contract Authorisation

One of the big changes with the SMS in 2014 is the introduction of electronic authorisation of Contracts so that all new contracts entered into between Coillte and a contractor will be issued, signed and stored electronically . There are five steps in authorising and storing a contract :

- Coillte Contract Administrator/Category Manager issues Contract to Contractor
- Contractor views dialogue and attached contract detail
- Contractor authorises contract
- Coillte Manager authorises Contract
- Contract stored electronically

Step 1 : Coillte issues Contract to Contractor via SMS

Contract created in Supplier Management System and a scanned copy of Contract is attached . The Contract Administrator then issues the contract by email to the Contractor using the dialogue facility with the following Instructions

The screenshot shows an email client interface. At the top, there is a header bar with a 'View History' button on the left and the text 'Contract k1400318 - K1400318 Corry Forest Harvesting Ltd' on the right. Below this is a 'Post Details' section with two tabs: 'Details' and 'Attachments'. The 'Details' tab is active, showing the following information:

Posted By: Seamus Corry	Date/Time Posted: 18/05/2014 14:59:14
From: Coillte	To: Corry Forest Harvesting Ltd
Subject: k1400318	

Below the details is a text area containing the following message:

I attach Contract Number K1400318 for authorisation. If you are happy to accept this contract Please insert the following when replying to this dialogue

" I hereby declare and confirm that I have read and (have the legal capacity and authority to (accept the attached contract form for and behalf of the Supplier pursuant to the terms and conditions "

Thanks

Joe Logs
Contract Manager

Step 2 : Contractor views Dialogue and Contract

The Contractor opens his/her email to view Contract offer and attached contract and using the reply option authorises the contract and replies to Coillte

Once email is received the Contractor logs into their Portal and will see the offer to authorise contract in Notifications area of home screen see below . To view the contract offer they should click on magnifying glass next to notification.

This will allow Contractor to view the correspondence and attached Contract Document

The screenshot shows the Coillte Contractor Portal. At the top, there is a header with the Coillte logo, the date '19 May 2014', the user 'Mr Contractor, Corry Forest Harvesting Ltd', and a 'LOGOUT' link. Below the header is a navigation menu with options: Home, Opportunities, Contracts, Customers, Orders and Invoicing, Administration, and Help. The main content area is titled 'Supplier Home' and 'Welcome Mr Contractor'. It includes a list of menu options on the left and a list of tasks and notifications on the right. A red arrow points from the 'No records found' box to the notification box.

Supplier Home

Welcome Mr Contractor

From here you can do the following:

- [Opportunities](#) - view opportunities.
- [Contracts](#) - view my Customer Contracts.
- [Customers](#) - manage your Customers and Trading Relationships.
- [Orders and Invoicing](#) - view and acknowledge orders and create Invoices to submit to your Customers online.
- [Administration](#) - specify Portal preferences and maintain details of your Organisation.

Use the links above or the menu options on the left to continue.

You have the following Outstanding Tasks:

No records found

You have the following Notifications:

Notification	Created Date	Actions
New Message Notification Contract 'PROACTIS Buyer Portal: https://PlazaUAT.ProactisP2P.com/ You have a new message from 'K1400318'.	18/05/2014	

The screenshot shows the Coillte contract details page. It includes a navigation menu with 'Overview' and 'Documents' tabs. The contract title is 'Coillte CONT1000522'. The page displays various contract details in a two-column layout.

Overview Documents

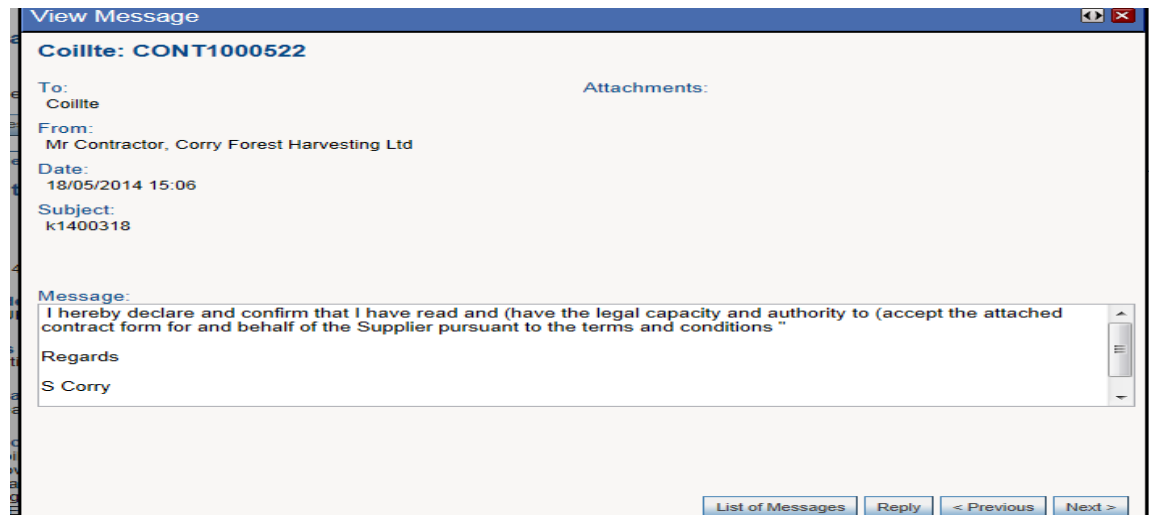
Coillte CONT1000522

Title: K1400318 Corry Forest Harvesting Ltd	Contract Start Date: 18/05/2014
Awarded Value: EUR 10,000.00	Contract End Date: 31/12/2014 00:00:00
Status: Active	Delivery Address: Hazelwood Avenue Daffodil Lane Sneakerstown Co Mayo Eire IRELAND
Purchasing Contact: Seamus Corry	
Contact Address: Coillte Government Buildings Cranmore Road Sligo IRELAND	

[View Messages](#)

Step 3 : Contractor responds to dialogue and authorises the contract

The contractor responds to the dialogue using the reply option and must use the legally acceptable wording to confirm authorisation of the Contract . Note the Contract is not fully authorised until it has been authorised by the Coillte Manager



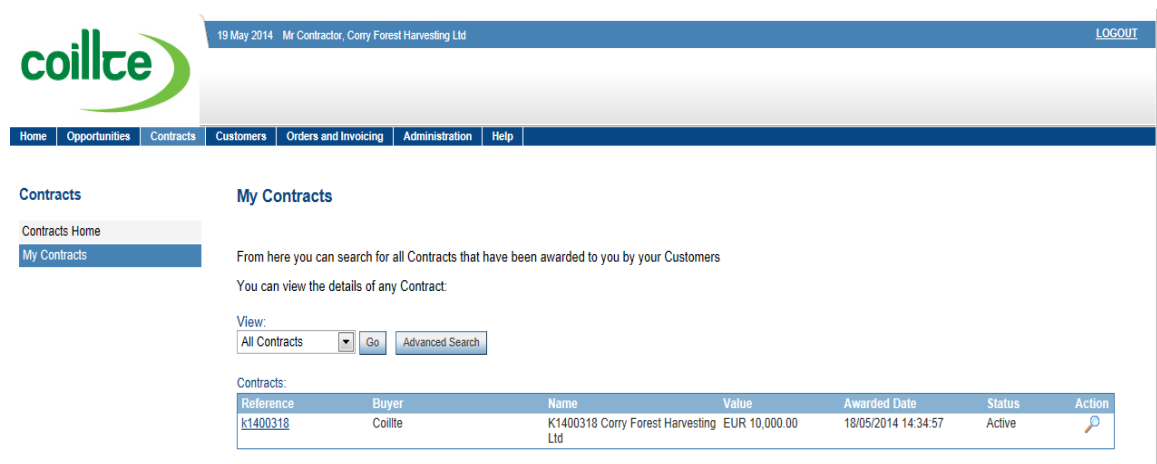
Tip : You can copy and paste the acceptable legal wording from the dialogue received from the Contract Manager

Step 4 : Coillte authorise Contract

Once the Contractor replies to the dialogue Coillte are notified by email and the contract is fully authorised by the relevant Coillte Manager . The contractor is notified that work can commence on the Contract

Step 5 : Viewing Contract in SMS

The Contract is electronically stored in the Supplier Management System in the Contracts Tab and you can access any copy of a contract by selecting the relevant Contract Number



Self-Invoicing

One of the most innovative functions in the Supplier Management System is the facility for all Contract work recording Information to be uploaded to the Supplier Portal so that the Contractor can generate an invoice automatically which gets processed for payment With no paper involved . There are four steps in the Process :

- Work is completed and the Contract Manager completed a GRN/CWR
- CWR is uploaded to Supplier Portal and Contractor notified by email
- Contractor reviews CWR and generates an Invoice
- Invoice gets automatically posted to Coillte accounts and paid by EFT

Contractor notified of new CWR

Once Contractor receives email they log into Supplier Portal and can see in their outstanding tasks details of the number of un-invoiced Orders they have in their task list

From: suppliersupport@proactis.com [mailto:suppliersupport@proactis.com]
Sent: 19 May 2014 14:46
To: Seamus Corry
Subject: Coillte has added order 6053087 to your portal

Dear Contractor Coillte have added a new CWR to your Supplier Portal. Please log on to your Supplier Portal to review the Order for Contract work done this month and generate an invoice to be included in the next payments run. Please remember to enter your Invoice number , invoice date which should be month end date in which contract work was completed and any additional information in the Comments Box Click on Submit Button to process invoice for payment on the 15th day of the month following invoice date.

Regards

Coillte SMS Support

19 May 2014 Mr Contractor, Corry Forest Harvesting Ltd LOGOUT

PROACTIS
The Spend Control Company

Home Opportunities Contracts Customers Orders and Invoicing Administration Help

Orders and Invoicing

Orders and Invoicing Home

Orders This module allows you to manage orders from your customers and raise invoices which will be sent electronically to your customers.

Acknowledgements From here you can do the following:

- [View and process Orders](#) - view and process orders which have been sent to you by your Customers.
- [Acknowledge Orders](#) - online Order Acknowledgement.
- [Create Invoices](#) - create Invoices for Orders and submit them to your Customers online.
- [View Acknowledgements](#) - view Acknowledgements which you have sent to your Customers.
- [View Sales Invoices](#) - view Sales Invoices which you have sent to your Customers.

Invoices Use the links above or the menu options on the left to continue.

You have the following Outstanding Tasks related to Orders and Invoicing:

Task	Actions
1 Uninvoiced Order(s)	

Contractor views CWR

The Contractor can view details of monies work tracked / certified for payment

Order Details



Click the buttons below to process this Order.

Purchase Order 6053087
Purchase Order

To: Corry Forest Harvesting Ltd
Daffodil Lane
Sneakerstown
Co Mayo
Ireland

Order Number: 6053087
Order Date: 16/02/2014
Raised By:

Delivery Address:

Special Instructions:
Contract Number: K1400318

#1:

Order Items:

#	Part Number	Description	UOM	Quantity	Price	Value	VAT Value
1	001 01 0301	Ind Cont Ind Cont	DAY	1	1,000.00	1,000.00	0.00
						Net Value	1,000.00
						VAT	0.00
						Total Value	1,000.00

Associated Documents:
No records found

If you are happy with Order certified for payment click on either **Accept Order** or **New Invoice** to create an Invoice . Note do not use acknowledge Order button as this will not create and Invoice

Contractor accepts CWR and generates Invoice

Create New Invoice

Fill in the details of the Invoice and submit to the Buyer electronically.

Invoice To: Coilte

Invoice Number:

Order Number: 6053087

Comments: Forest consultant S Corry 1 day 23rd May 2014

Invoice Date:

Order Date: 16/02/2014

Invoice Items:

Part Number	Description	Price	UOM	Quantity Ordered	Previously Invoiced (Qty)	Previously Invoiced (Value)	Quantity	Net Value	VAT Value	Order Line Complete?
001 01 0301	Ind Cont Ind Cont	1000	DAY	1.00	0.00	0.00	<input type="text" value="1.00"/>	<input type="text" value="1,000.00"/>	<input type="text" value="0.00"/>	<input checked="" type="checkbox"/>
								Net Value	1,000.00	
								VAT	0.00	
								Total Value	1,000.00	

Invoice Creation continued

Once the Contractor accepts the Order (CWR) it flips the Order into an Invoice
And allows the contractor to edit three fields as follows:

- Enter own Invoice Number or accept automatically generated Invoice No
- Amend Invoice date note last day of month in which contract work was done
Should be entered to calculate correct due date in Agresso
- Enter comments or additional information on Invoice

Contractor cannot edit any other field when creating invoice

Coillte: 6053087

Supplier: Corry Forest Harvesting Ltd	Invoice Date: 30/04/2014	Comments: Forest consultant S Corry 1 day 23rd May 2014
Invoice Number: 2427	VAT Registration Number: IE4558235K	
Supplier Address: Hazelwood Avenue Daffodil Lane Sneakerstown Co Mayo Eire IRELAND	Currency Code:	

Items:

Part Number	Description	UOM	Quantity	Price	Value	VAT Value
001 01 0301	Ind Cont Ind Cont	DAY	1.00	1,000.00	1,000.00	0.00
					Net Value	1,000.00
					VAT	0.00
					Total Value	1,000.00

Associated Documents:

ID	Date	Type	Value	Action
6053087	16/02/2014	Order	1,000.00	

Once invoice is Submitted it gets posted to Coillte Accounts and is paid by Electronic Funds Transfer (EFT) on the 15th day of the following month . For example April 2014 work will be paid on 15th May 2014

Supplier Invoices Review and Print

Suppliers can view all their invoices by clicking on the Orders and invoicing menu
And selecting the relevant invoice . They can also Print a copy of the Invoice for their records if required

Frequently Asked Questions

Q. What do I do if I forget my password or cannot access the system ?

A. Contact the SMS Support desk at Coillte by ringing (01) 2011171 or email smssupport@coillte.ie or contact any of the Accounts Payable team at accountspayable@coillte.ie who will reset your password or help you with any other access issues

Q. Who is responsible for sending me contract via SMS to authorise ?

A. If the contract is awarded following a tender competition it is the responsibility of the Coillte Category Manager to issue the contract and where the contract is created outside a tender competition it is the Contract Administrator Martina Conway who will issue the contract on behalf of the Contract Manager

Q. When will I be paid for my contract work ?

A. Coillte has payment terms for contract work of 15 days net which means that for example work completed in April will be paid on 15th May provided the Contractor has generated and submitted their invoice within two working days of Payment date. Invoices not submitted on time will be paid the following month

Q. Do I require an Insurance declaration for every contract I have with Coillte ?

A. No you will be required to get your broker to complete an insurance Declaration Form only once per annum and this will be stored in SMS to cover all contracts Up to expiry date when new form should be submitted

Q. What do I as a contractor have to do to authorise a Contract ?

A. Once you receive an email from Coillte indicating you have a contract to authorise Log into Supplier Portal , click on relevant notification on home page, view the Message and contract and using the reply option respond to dialogue making sure To use the correct legal response as indicated on page 6 of Guide

Q. Do I need to print a copy of my contract to store ?

A. No your Contract is always available for you to view, print etc. by clicking on Contracts tab in SMS menu

Q. What documents should I upload to Supplier Management System ?

A. One of the benefits of the Supplier Management System is that you can upload Key documents which Coillte Require to do business and these are available for all Contracts until they expire and the system will issue a reminder to upload a new Document. The key documents which Coillte require include Tax Clearance Cert, Insurance Declaration, Bank Details and Terms and Conditions acceptance