Guide for UNDP suppliers using Quantum Portal

October 2022

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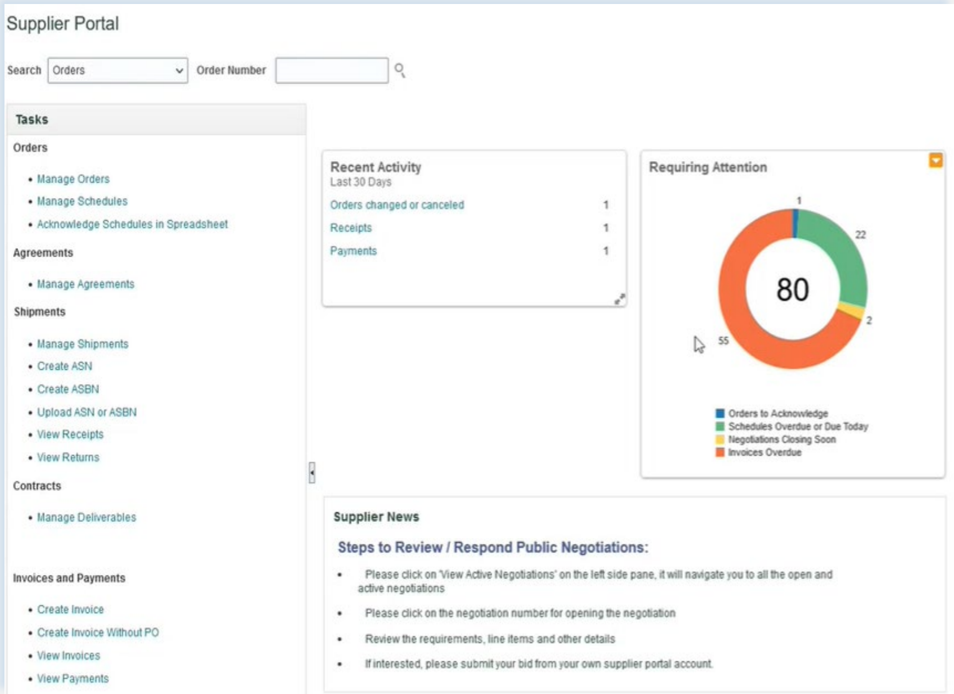
1. Introduction



Several of United Nations (UN) Agencies including United Nations Development Programme (UNDP), United Nations Population Fund (UNFPA), United Nations Entity for Gender Equality and Empowerment of Women (UN Women), United Nations Capital Development Fund (UNCDF), United Nations Volunteers (UNV), have partnered together to use a unified new ERP system from Oracle Cloud that includes a supplier portal that will manage interaction with suppliers for solicitation process and contract management. This document is intended for any supplier who wishes to do business with any of the aforementioned UN Agencies (Partner Agencies) and to serve as a guide on how to use the online portal system.

In the initial phase during 2022, the new portal will function in parallel with existing systems of Partner Agencies and will be utilized only for specific tender processes from select Offices. Therefore, suppliers need to register and use Oracle Portal only for the specific tender opportunities which are managed via the Oracle portal. During this initial period, the Partner Agencies will continue using existing online tendering systems, such as ATLAS eTendering, InTend, etc. Suppliers need to use profiles of those systems (or register one if needed) to participate in tenders managed in the other platforms.

Quick References to the Guide

The ***Supplier Portal guide*** is intended for individuals or companies who wish to participate in a tenders/negotiations managed through this portal or register as an authorized supplier to acknowledge and manage contract agreements via the portal.

For quick reference, you can navigate directly to a specific topic by clicking on the relevant hyperlink:

- To create a profile and register as a supplier in the portal, please refer to the section on how to **Register a Supplier Profile**.
- To search for Tenders and download tender documents with a registered user account please **click here.**
- If you already have an account and wish to participate in a tender, please refer to the section on **How to Submit a Bid**
- If you already are a Spend/authorized supplier and wish to create an Invoice or manage Purchase Orders, please click **here**.
- If you have an account, but have forgotten your password, please click **here**.
- If you are experiencing any technical difficulties with signing in, registration, or bid submission, please refer to the section on **Helpdesk Support** **.**

1.1 How to use the Guide

This guide is organized in several sections that correspond to different functions of the Supplier Portal such as registration, submitting bids, maintaining profile, etc.

The **Table of Contents** provides a detailed overview of all the topics covered in this User Guide. It contains hyperlinks to the exact page of the content in the document so the reader can navigate directly to the relevant section. Each section starts with a brief overview of the content of that section with hyperlinks.

Throughout the document, there are three types of hyperlinks:

- Hyperlink buttons that will take reader to the main TOC, found at the top right corner of each main chapter page, such as the one on this page.
- Hyperlinks that take readers to the beginning of the current section, usually found at the bottom left corner like in this page.
- Hyperlinked words that take reader directly to a location of the document related to the text. For example, by clicking on the hyperlinked TOC here, the reader can go directly to the TOC page of this document.

1.2 What is Supplier Portal?

The Supplier Portal module is designed to facilitate Supplier interactions during tender process and later for contract management. The system aims to enhance the integrity and transparency of the procurement process and enables the streamlining of the processes: Suppliers can use online portal to view solicitation documents, submit their bids, communicate with procurement office, etc.

The Supplier Portal system addresses UN's fundamental procurement values, such as **fairness**, **integrity**, **transparency** and **accountability**.

Some of the main benefits of the system are:

- ✓ ***No late submissions are accepted:*** The system will automatically not accept any bid after the deadline.
- ✓ ***Electronic sealed bids:*** The system encrypts the bids submitted in the system and does not allow anyone to view any information provided before the bidding deadline.
- ✓ ***Electronic stamping of the bids:*** The system stamps all information submitted by suppliers and prevents anyone from altering, deleting, or adding anything to the bid after the deadline for submission.
- ✓ ***Streamlines the bidding process:*** Suppliers can register in the system, retrieve all information and solicitation documents, submit their bid online, edit it directly in the system, and receive automatic notifications once the evaluation is finalized and the contract is awarded.
- ✓ ***Electronic submissions of Invoices :*** The system enables suppliers to submit their own invoices and view payments, receipts and orders electronically.
- ✓ ***Provides an audit trail:*** As the Supplier Portal system records all activity in the system, it keeps an audit trail for increased accountability and transparency.

Click to return to TOC

2 Register Supplier Profile

Suppliers using Quantum Supplier Portal for the first time must register for a Supplier User Account before participating in any online tender. This section provides a brief overview of the supplier registration process, how to log in to begin registration, and how to register your Supplier profile.

IMPORTANT

You should register for an account only once. If you have forgotten your password, use the option ***Need help signing in?***

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Overview of registration process

The first time a bidder enters the Quantum Supplier Portal, a one-time registration process is required. Bidders only register once, and thereafter enter the Portal with their own User ID and password.

Action 1
Compile the required information

Action 2
Click the link for Supplier registration

Action 3
Register Supplier Profile Details

Action 4
Create password and login the system

Mandatory:
- ✓ D-U-N-S number (if you have one) and taxpayer ID or Tax registration number.
- ✓ Company name as legally registered.
- ✓ Contact details for maintain the account. Read more details in the guide.
- ✓ Legal address of the company.
- ✓ Documentation required if your company falls under one of the categories as explained in the guide.
- ✓ Document about women ownership status of the company if relevant.
- ✓ Banking Proof for **Spend /Authorised** Suppliers

Recommended:
- ✓ Brief description of the company profile.
- ✓ Copies for company registration documents.
- ✓ Copies of following documents if you possess them:
  - ✓ ISO 9001, ISO 14001, ISO 14064, or equivalent;
  - ✓ Internal company policy documents relevant to these quality requirements;

IMPORTANT
- Have the necessary information and documentation ready before starting registration process.
- Companies with their own email domains need to make sure that undp.org and oracle.com is not in blocked by their email firewalls.

Click to return to **Register Profile** Main Page

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Action 2: Click on the link for Supplier Registration

To start the registration of your supplier profile please click on the registration link that is provided in the Procurement notice OR that would be provided directly in Negotiations.

IMPORTANT

If you are already registered in the system but do not remember your password, please **do not register again**.

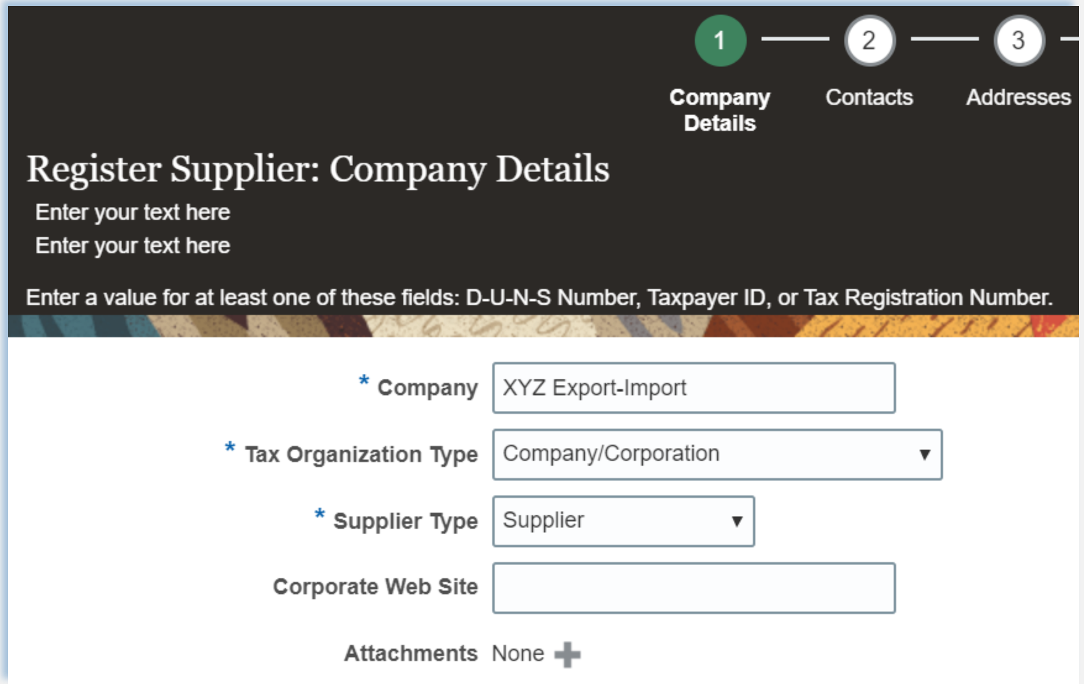
Please click here to login the system with your User ID (email address) and the password. If you have forgotten your password, you need to click on the "***Forgotten Password"*** link and create a new password. Please see instructions on how to generate a new password if you forget it.

Click to return to **Register Profile** Main Page

QUANTUM

Action 3: Register Supplier Company Details

Step 1: Enter the Company Details



In the first step of registration, the supplier must enter/select the following Company Details (all fields marked with * must be filled)

- **Company (name)**
  - ✓ Must correspond to the name recognized and registered in relevant registration office.
  - ✓ Only *Latin characters* are allowed for the Company name.
  - ✓ Special characters are not permitted in Company names.
  - ✓ If you create another profile for the name already registered, the system will allow for saving, however, you will not receive the registration emails.
  - ✓ In case you have already created a user profile and experienced issues with the registration, please reach out to the Procurement Focal Point.
- **Tax Organization Type** Select one of the options from the dropdown menu.
- **Supplier Type** Select one of the options from the dropdown menu. Companies should select the option Supplier. Individuals should select the option Individual – Contractor.

Optional:

- Enter the link for **Corporate Web Site.**
- Add relevant documents (if any) in the **Attachments**

Click to return to
Register Profile
Main Page

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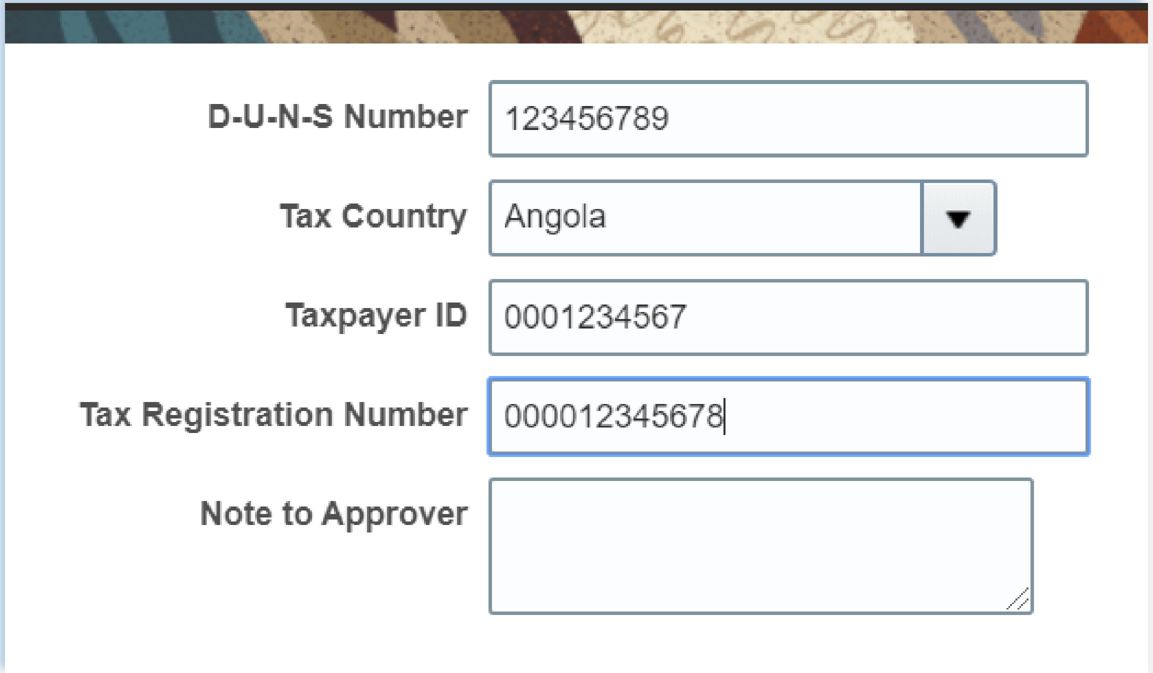
Action 3: Register Supplier Company Details

Step 1 (continued): Enter the Company Details

Enter a value for at least one of these fields:

- **D-U-N-S Number** (it should contain 9 or 12 digits)
- **Taxpayer ID**
- **Tax Registration Number**

The Taxpayer ID and the Tax Registration Number are greyed out by default. Please select the **Tax Country** first and the other fields will open for completion.



IMPORTANT

In case you do not have a D-U-N-S Number or Taxpayer ID or Tax Registration Number, insert unique identifier to your company/individual such as national id etc.

Click to return to **Register Profile** Main Page

Action 3: Register Supplier Profile Details

"Step 1 (continued): Enter the company details

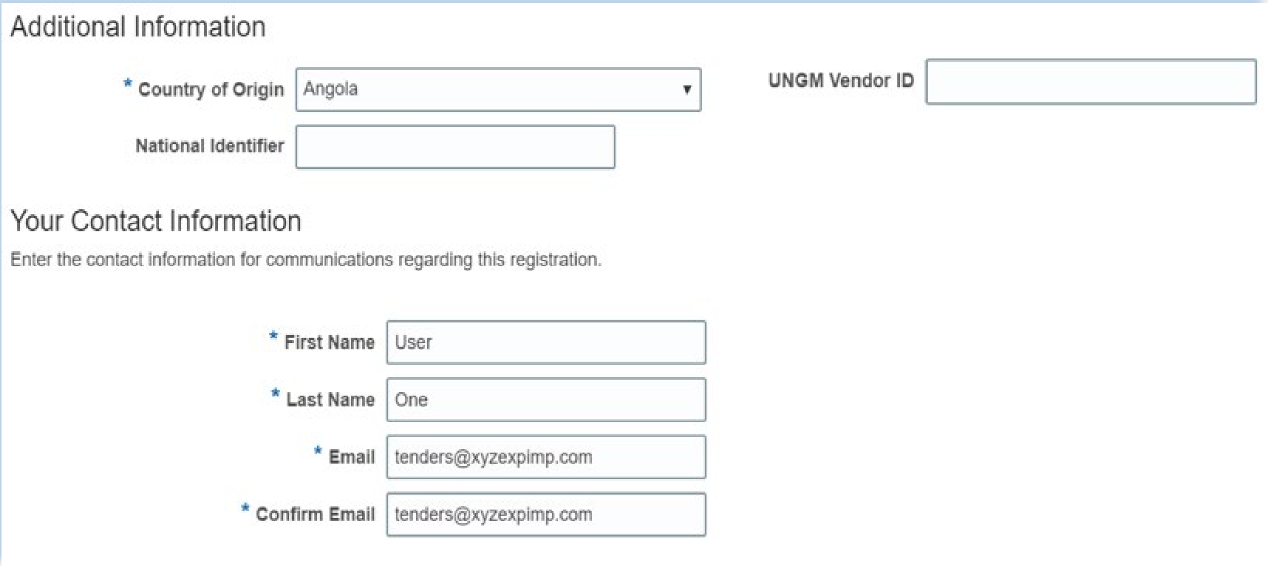
Country of Origin" Select a country from the dropdown menu.

"***First/Last name***" Name of the person authorized by your company to use the system and represent the company.

"***Email address"*** Must be a valid email address for your company. Please note that this e-mail address will be used as User ID to login the system and all future communication from the system will be sent to this address.

IMPORTANT

To avoid issues and keep control of your supplier profile in case the employee working on the bids submission leaves the company, please use a generic e-mail address that multiple employees of your company have access to.



"***UNGM Vendor ID"*** If you are already registered on the UNGM Website, enter your UNGM Vendor ID.

Once all the info is entered, click "***Next***" or "***Contacts***" to go to the next step.

Click to return to **Register Profile** Main Page

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Action 3: Register Supplier Profile Details

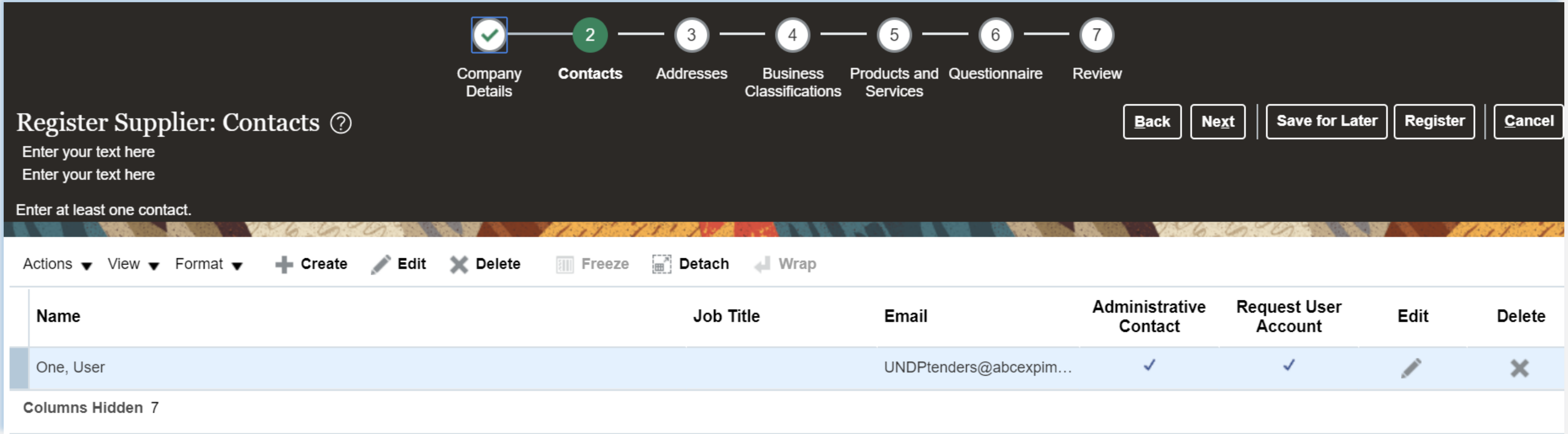
Step 2: Review the Contact(s)

On Step 1, you entered the contact details (first, last name and the e-mail address). On this page you can add more contacts, however we advise you to initially keep one contact only. More explanation is provided in the section - Manage supplier profile.
To go to the next step, please click "***Next***" or "***Addresses***".

Tip

The system times out after a certain time of inactivity and any unsaved changes will be lost. To save the data entered at any moment prior to completing the registration and to be able to continue working on the registration later, please click the "***Save for Later***" button.

The system will send an e-mail to the e-mail address entered at Step 1 of the registration, containing a link that you should click to continue the registration.



Click to return to **Register Profile** Main Page

QUANTUM

Action 3: Register Supplier Profile Details

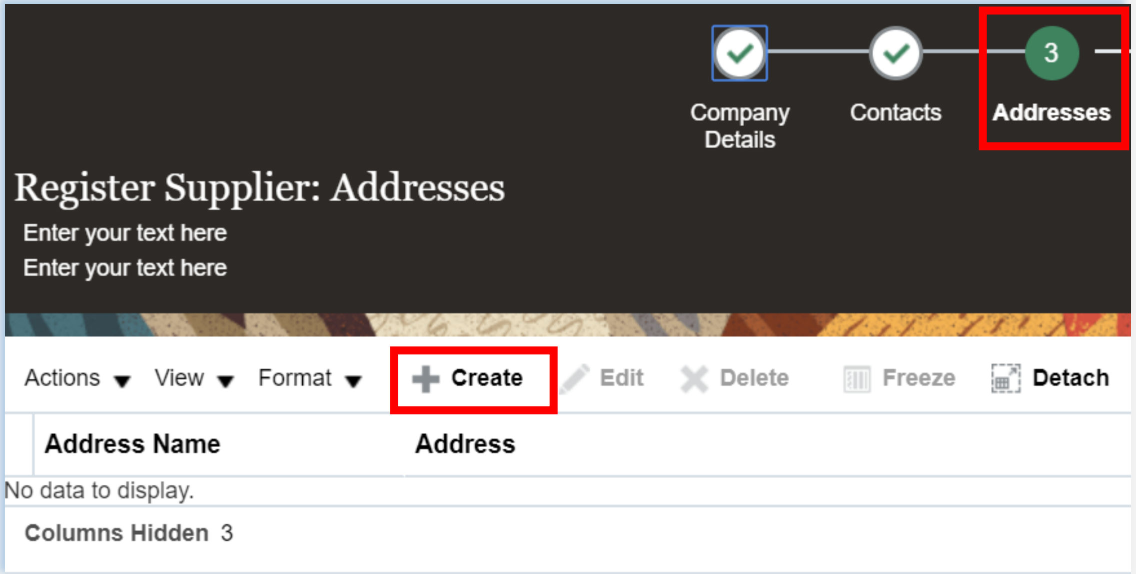
Step 3: Enter Company address

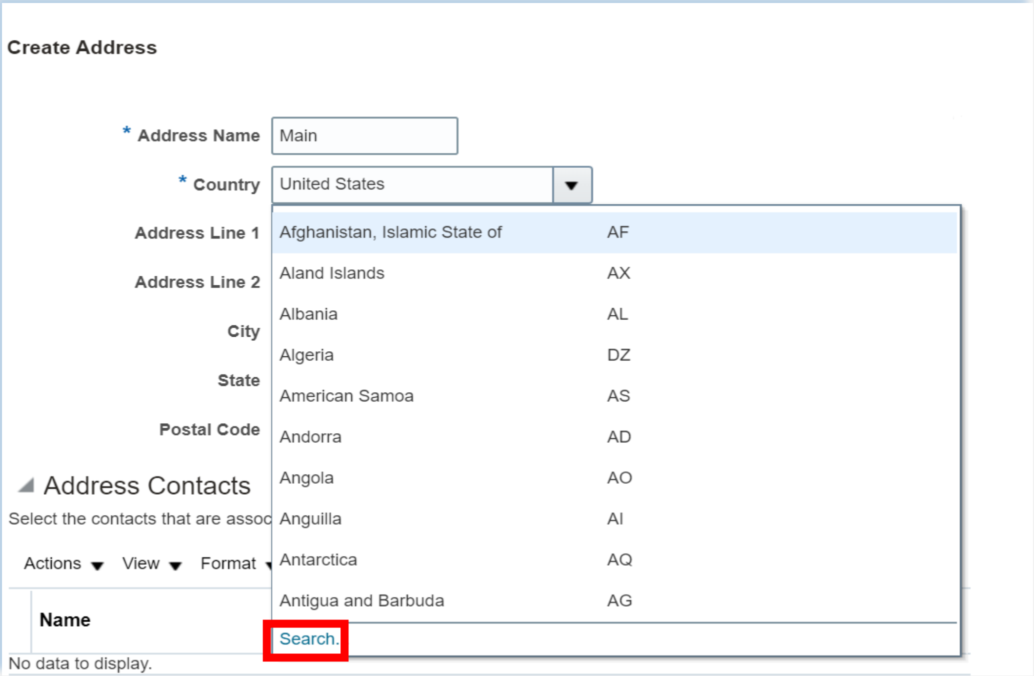
In Step 3, click "***Create***" to enter the supplier address.

IMPORTANT

Please pay special attention to the selected country

For all bidder profiles, please make sure to select the country of your address and if not appearing by default, change it by clicking on "***Search***" in the **Country** dropdown menu. Then, search and select the correct country from the drop-down menu.





Click to return to **Register Profile** Main Page

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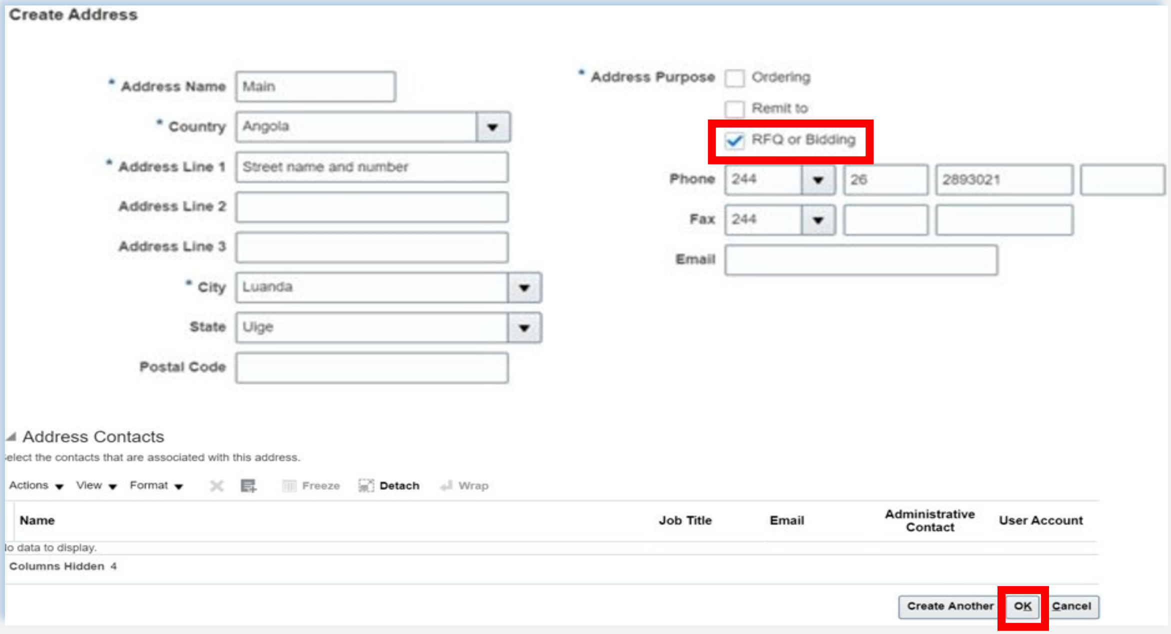
Action 3: Register Supplier Profile Details

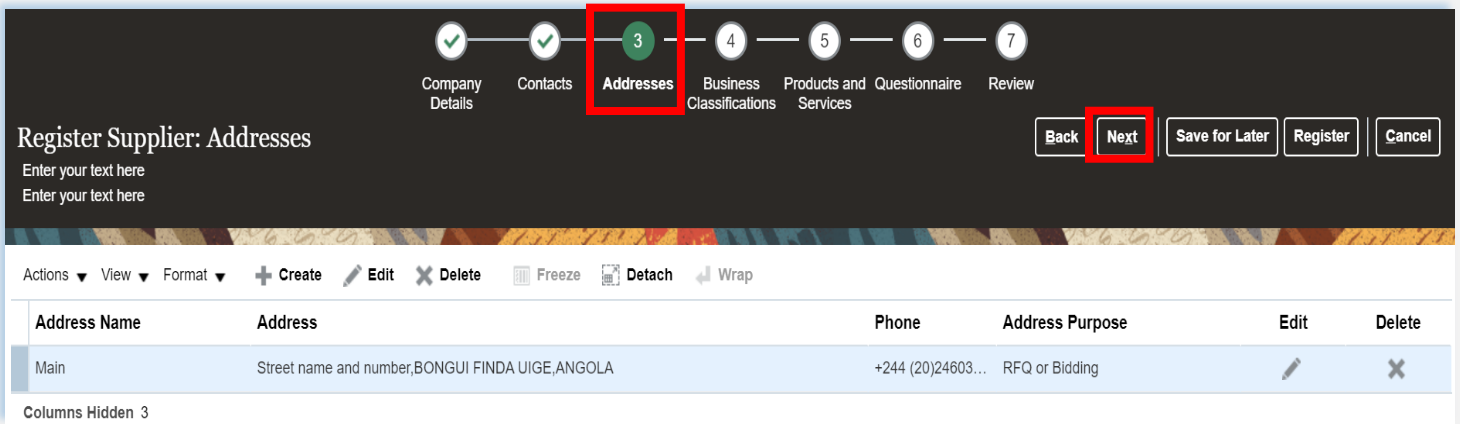


Step 3: Enter Company address - continued

Enter the info for all fields marked with *.

Enter the Address Name (e.g. Main, HQ. etc).

Check the box "**RFQ or Bidding**".



Once you complete the required info, click "***OK***". To go to the next step click ***"Next"*** or ***"Business Classifications"***.

Click to return to **Register Profile** Main Page

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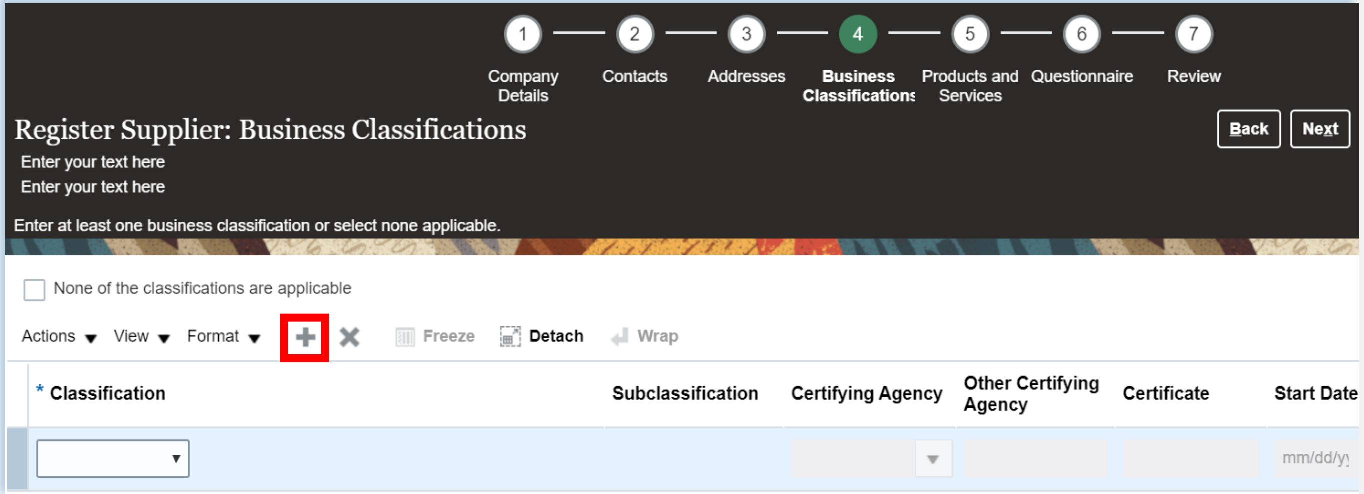
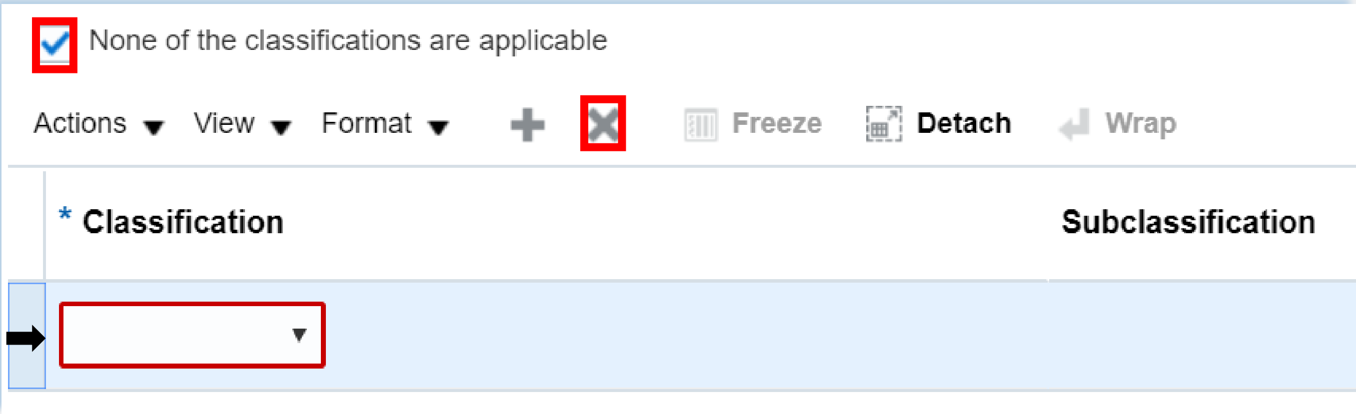
Action 3: Register Supplier Profile Details

Step 4: Select the Business classifications

Click the **+** button to add a Business Classification. Then, select one of the options from the dropdown menu in the ***"Classification"*** field.



If you cannot identify any option in the list which describes the classification of your company's business, select the row and click the **X** icon. Then, check the box "***None of these apply***".



Once you have completed this section, click on ***"Products and services"*** or ***"Next".***

Click to return to **Register Profile** Main Page

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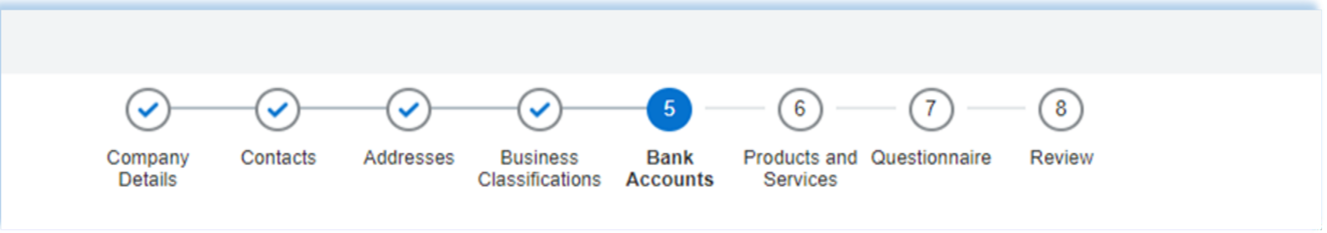
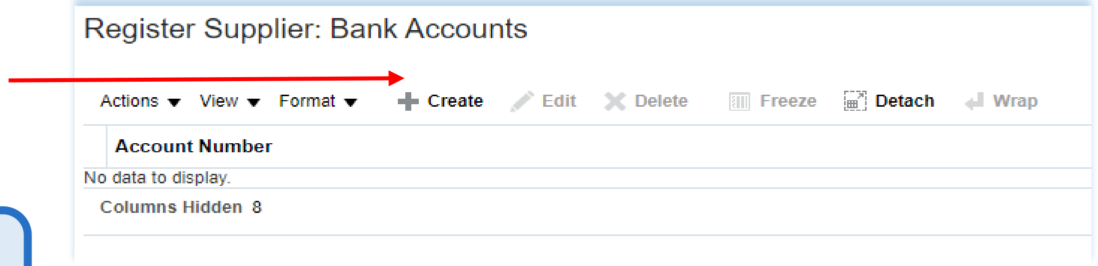
Action 3: Register Supplier Profile Details – Bank Accounts

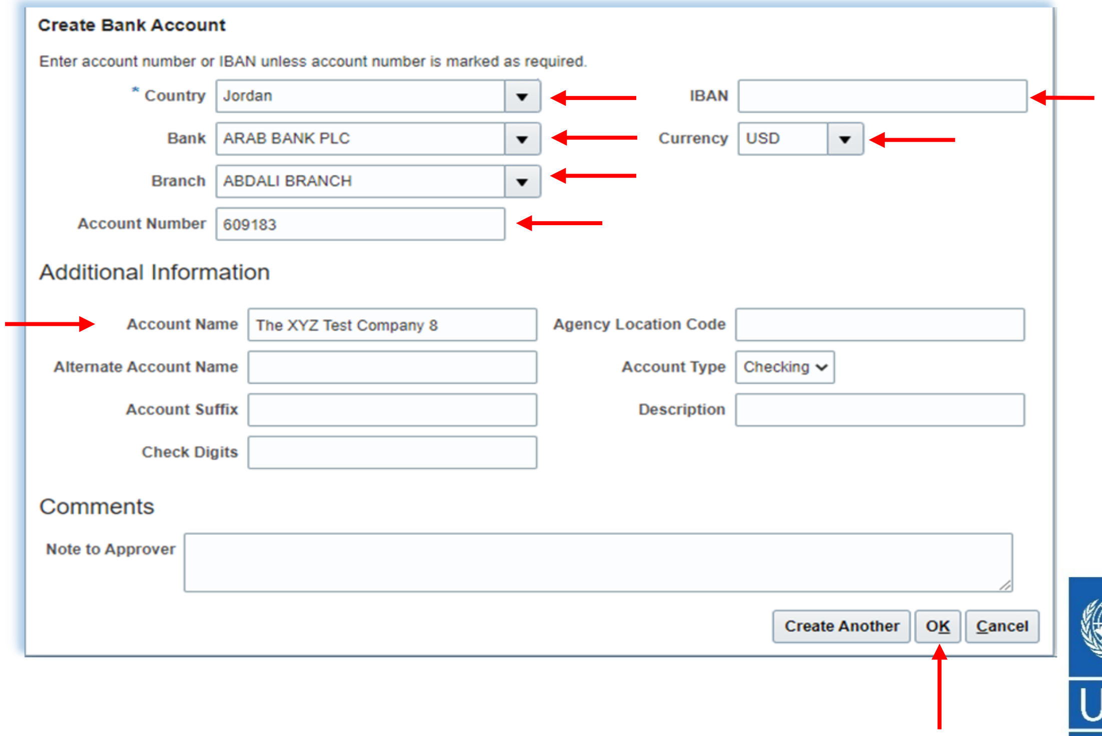


Step 5: Select the Bank Accounts, applicable for Spend/Authorised Suppliers.



IMPORTANT

If the Bank Accounts tab is not available, skip to the next page.



- Click "***+Create***" button to add a Bank Accounts.
- Enter the bank account details according to the requirements of the country .
- Select Country, Bank, Branch and Currency from the dropdown lists.
- Add Bank Account Number /IBAN
- Add the additional Information details, if applicable.
- Click "***Ok***" to save the Bank details
- Click ***"Products and services"*** tab or ***"Next".***

Click to return to **Register Profile** Main Page

Action 3: Register Supplier Profile Details

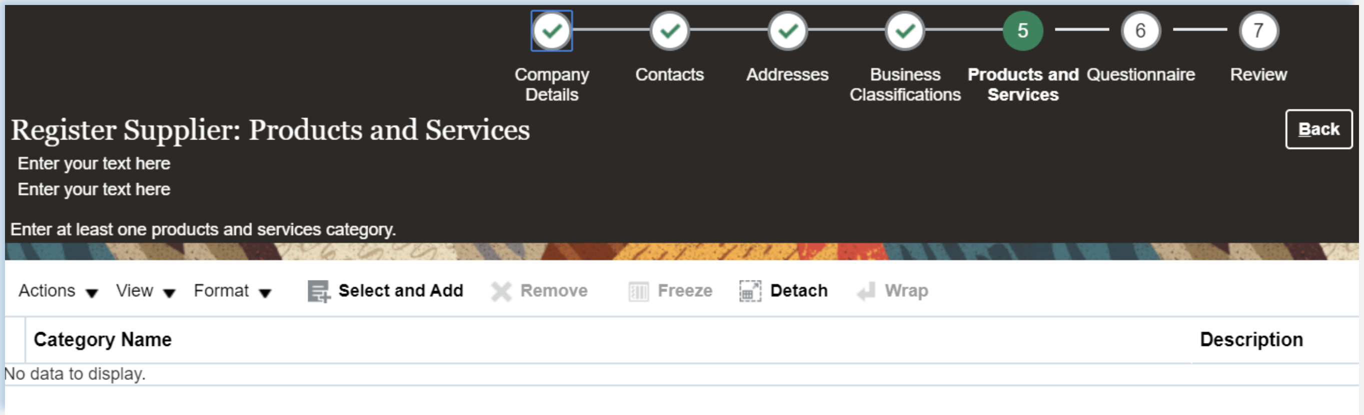
Step 5: Select Products and services

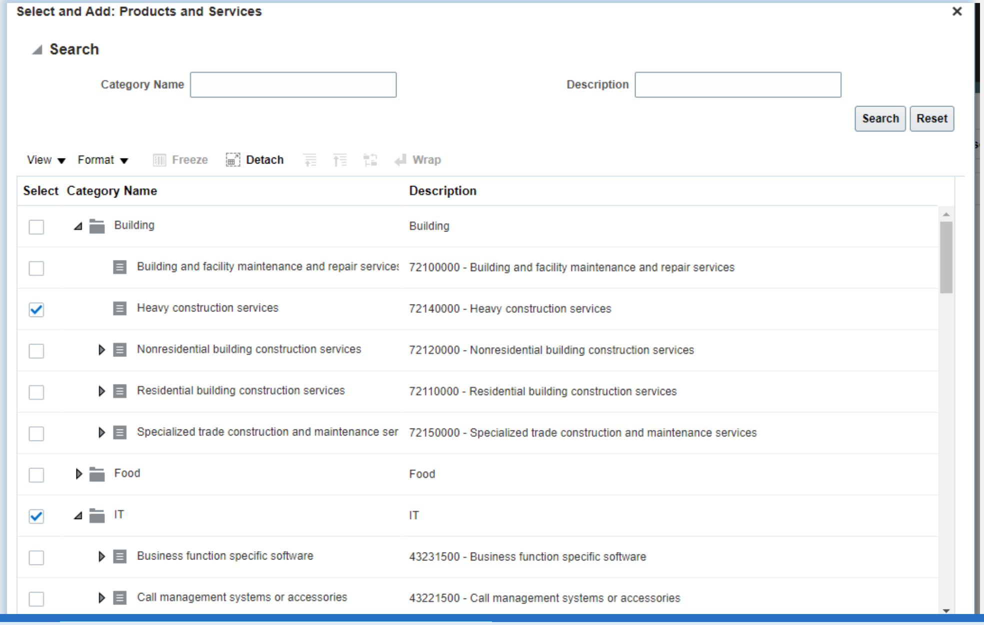
Click on ***"Select and Add"*** icon.
You can select a whole category by checking the box for the category you wish to add.

You can expand each Product/Service category and see all the sub-categories by clicking the ***Expand*** icon. Then, you can select a more specific sub-category that best describes the product/service that your company offers by checking the appropriate box.

You can select multiple categories and/or subcategories). Then click ***"OK"***. To remove a selected category/subcategory from the list, select it in the list and click the **"*X-Remove*"** icon.

To move to the next step, click ***"Next"*** or ***"Questionnaire".***





⚠ **IMPORTANT**

If the Product and Services tab is not available, skip to the next page.

Click to return to
Register Profile
Main Page

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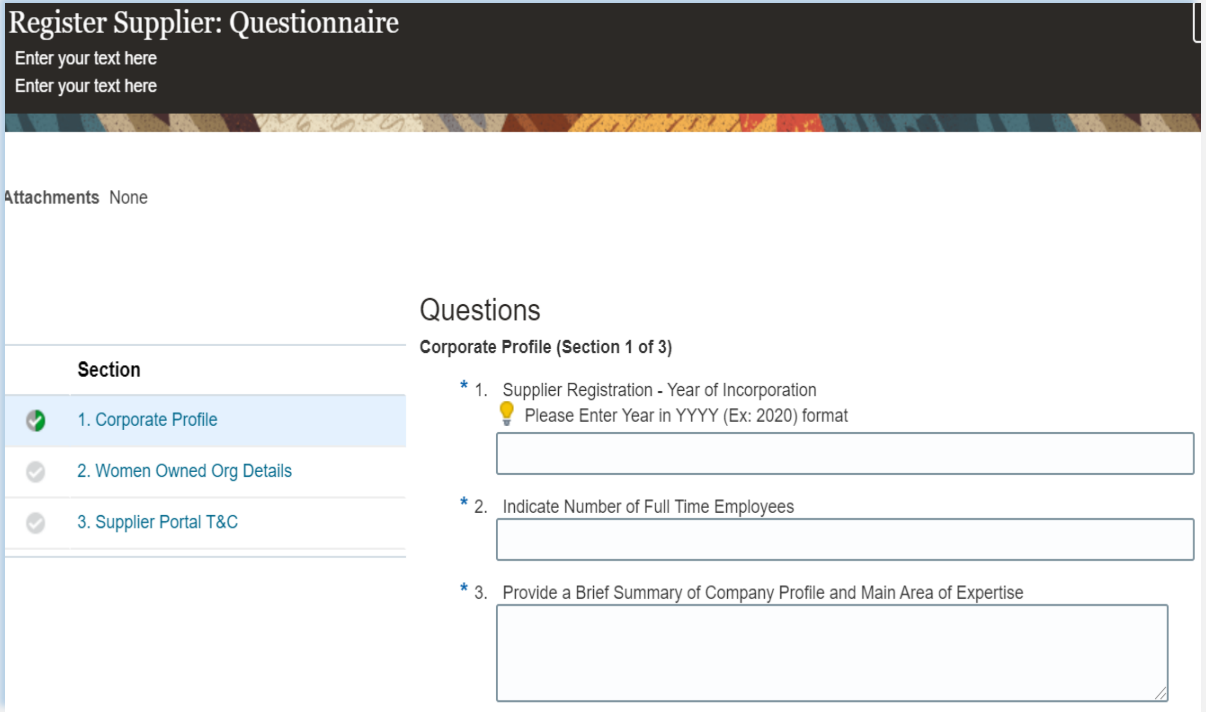
Action 3: Register Supplier Profile Details

Step 6: Complete the Questionnaire, review the data and finalize the registration



There are multiple sections with questions in the Questionnaire. Some of the questions require selecting one or multiple options from a list of answers. Other questions require a textual answer. Please provide as much possible a comprehensive answer to these questions. Most of them will be included in specific tenders and when you will prepare your bid responses the answers provided at the registration will automatically appear (you will not need to answer them again).

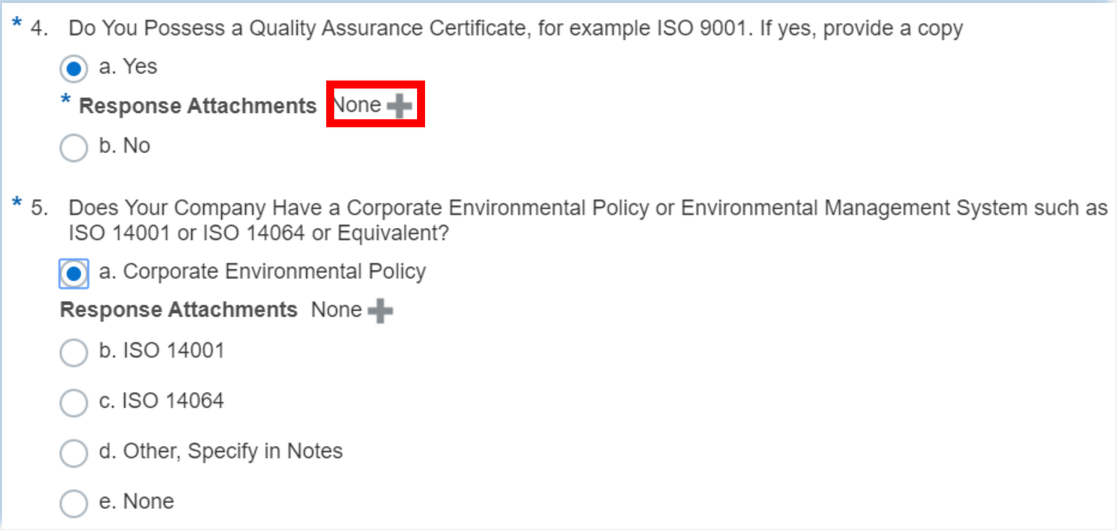
Some of the question that you will answer with the option "***Yes***" will require to upload a scan of the supporting document. Please follow the steps explained on the next page.

To move from one section to another, click on the corresponding section listed under "***Sections***" or the ***"Next Section"/"Previous Section"*** at the bottom of the page.

Click to return to **Register Profile** Main Page

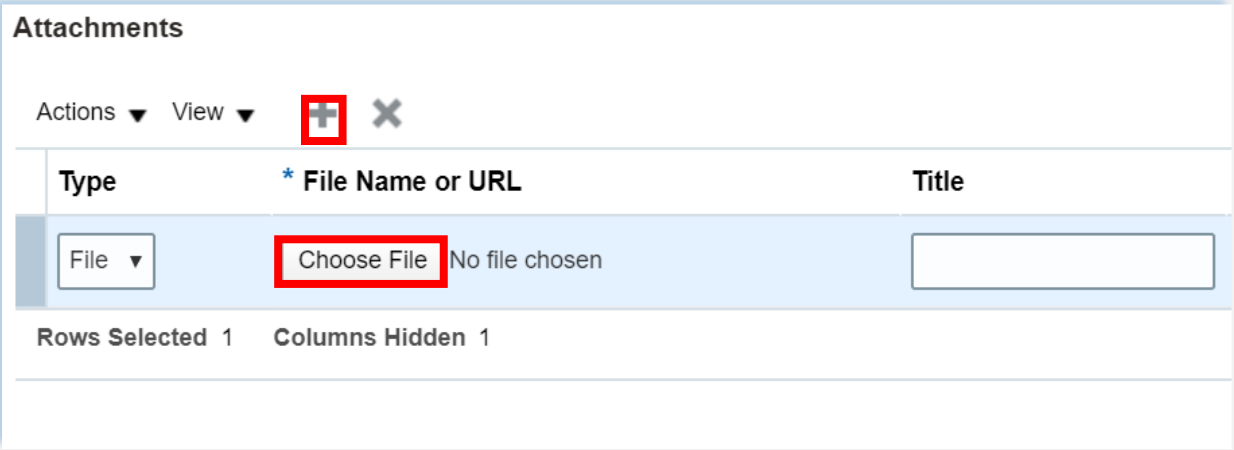
Action 3: Register Supplier Profile Details

Step 6: Complete the Questionnaire, review the data and finalize the registration - continued



Click on the **+** below the response "***Yes***" to add the required attachment.

Click again on the **+** and then the button "***Choose File***". Select the file you wish to attach, enter the description in the **Description** field and click "***OK".***



Repeat the same process for each question required a supporting document to be attached.

To move from one section to another, click on the corresponding section listed under "***Sections"*** or the ***"Next Section"/"Previous Section"*** at the bottom of the page.

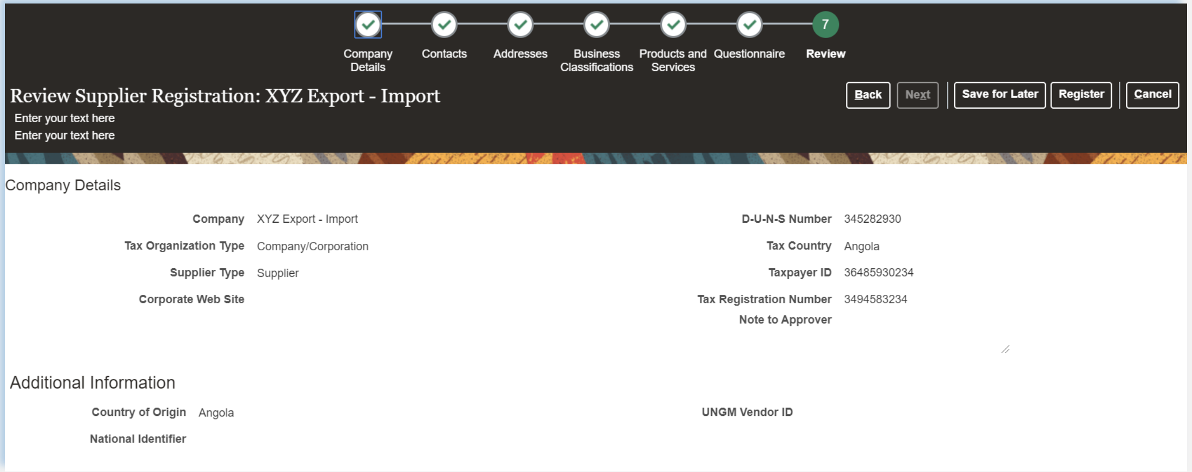
Click to return to **Register Profile** Main Page

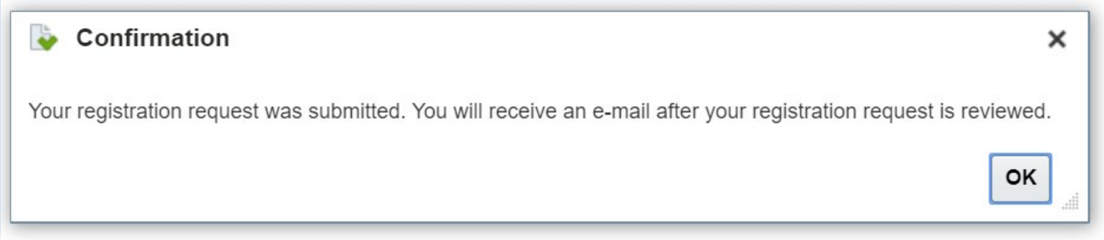
Action 3: Register Supplier Profile Details

Step 6: Complete the Questionnaire, review the data and finalize the registration - continued

To review the data entered at all registration steps, click on "***Review***".

To finish the registration, click the "***Register***" button. A confirmation message will pop-up on your screen confirming that the registration was submitted.





Click to return to **Register Profile** Main Page

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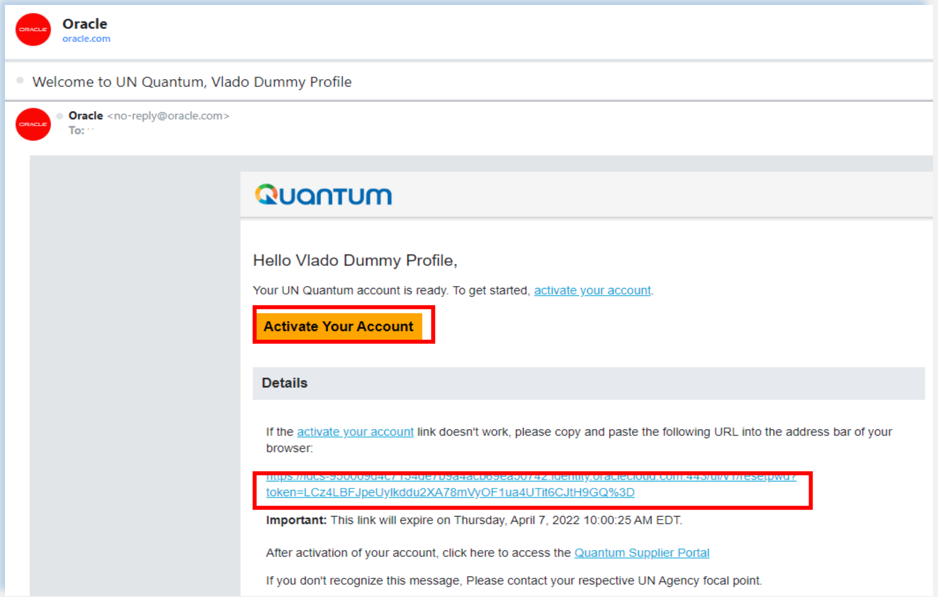
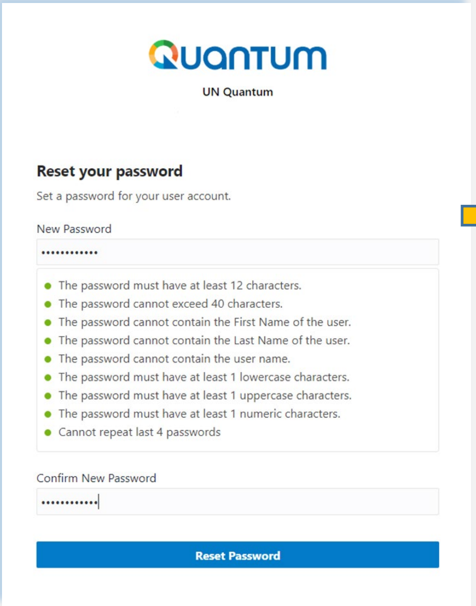
After completing the registration, you should receive three automatically generated e-mails. If the emails are not in the Inbox, verify the Spam/Junk mailbox of your email address.

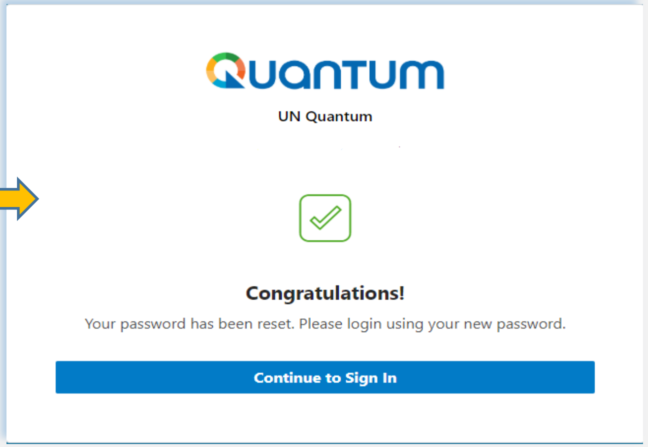
Action 4: Create password and login to the system (continued)

If the Supplier profile was successfully created, you should receive a second e-mail generated from the system. This e-mail contains a link to Activate Your Account, set your password and login the system. Click on "***Activate Your Account***" or copy/paste the URL from the email into the address bar of your browser.



The Password Setup page will open. Enter your password. Retype/Confirm your password.
Click the button ***"Reset Password"***.
If the setting up password was successful, a confirmation message will pop-up on your screen and a confirmation email will be sent to your email address.

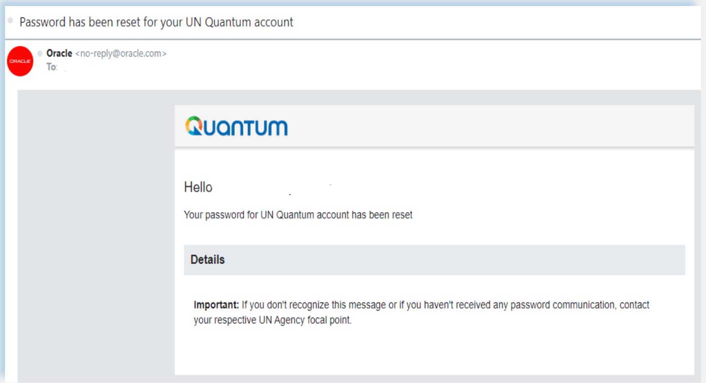


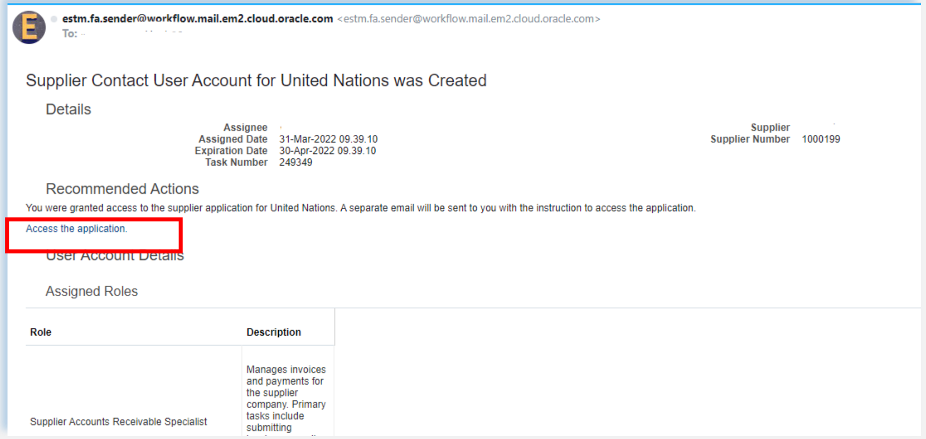


[Click to return to **Register Profile** Main Page]

Action 4: Create password and login to the system (continued)

Click on "***Continue to Sign In"*** to go to the Quantum Login page. Alternatively, one of the emails that you received contains a link to login to the system. Click on "***Access the application"***, enter your login credentials (your e-mail address as a User ID and the password you set) and click the "***Sign In***" button.

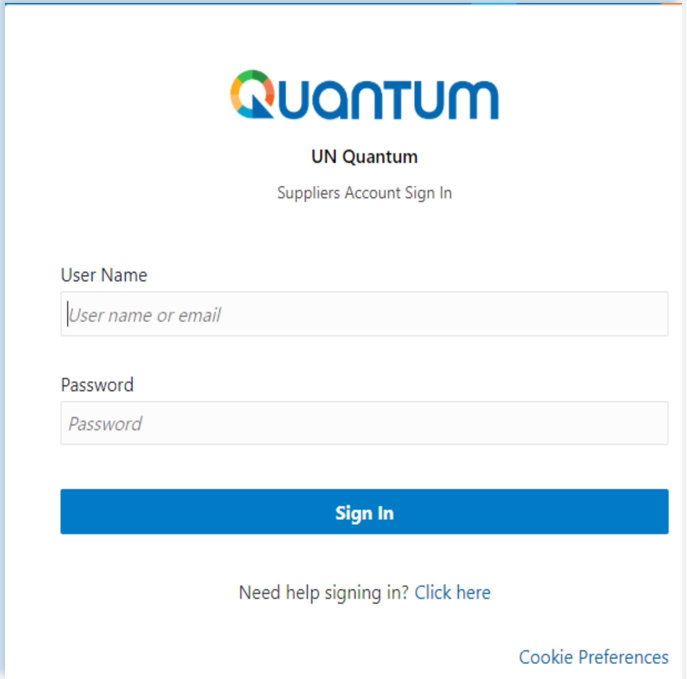




[Click to return to **Register Profile** Main Page]

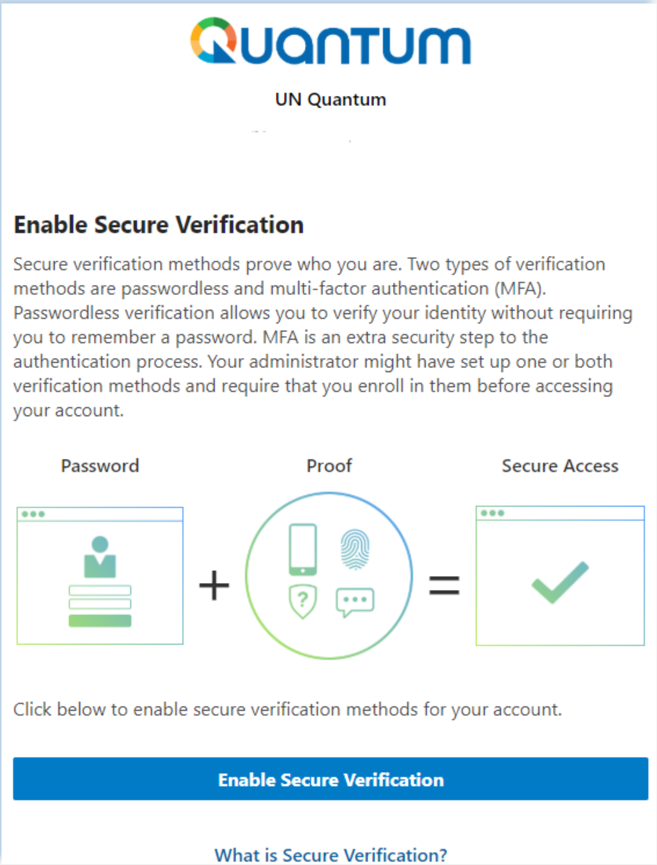
Action 4: Create password and login to the system (continued)

Enter your User Name (the email addressed registered with your profile) and the Password. Click on "***Sign In***".



The Quantum Supplier Portal contains a secure verification and gives you another layer of security for your Supplier Profile.

Click on "***Enable Secure Verification***".



Click to return to
Register Profile
Main Page

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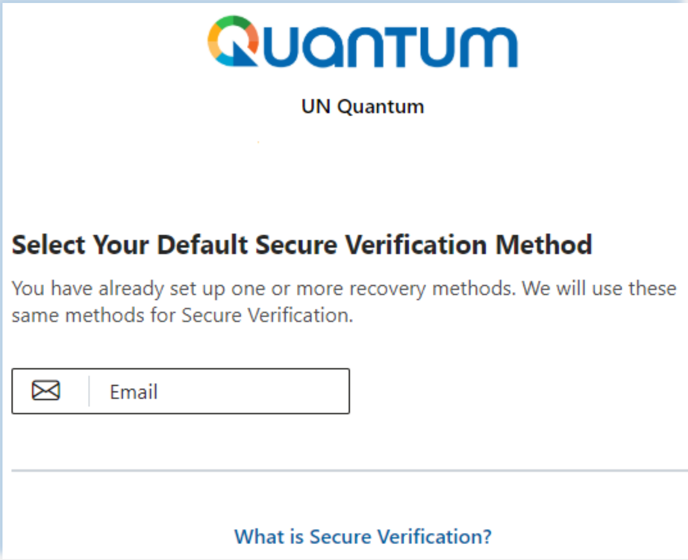
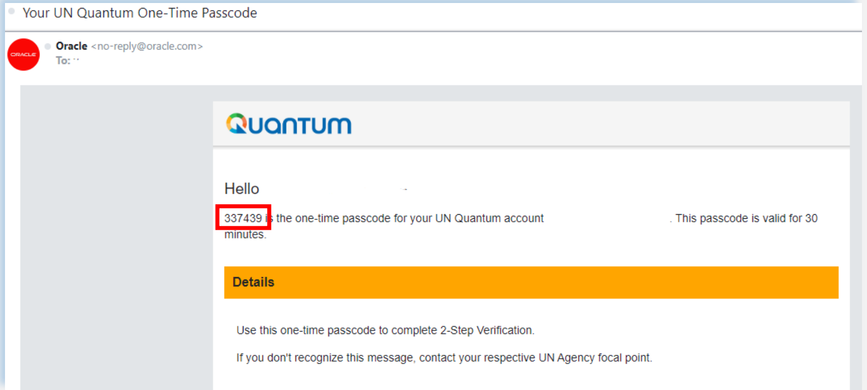
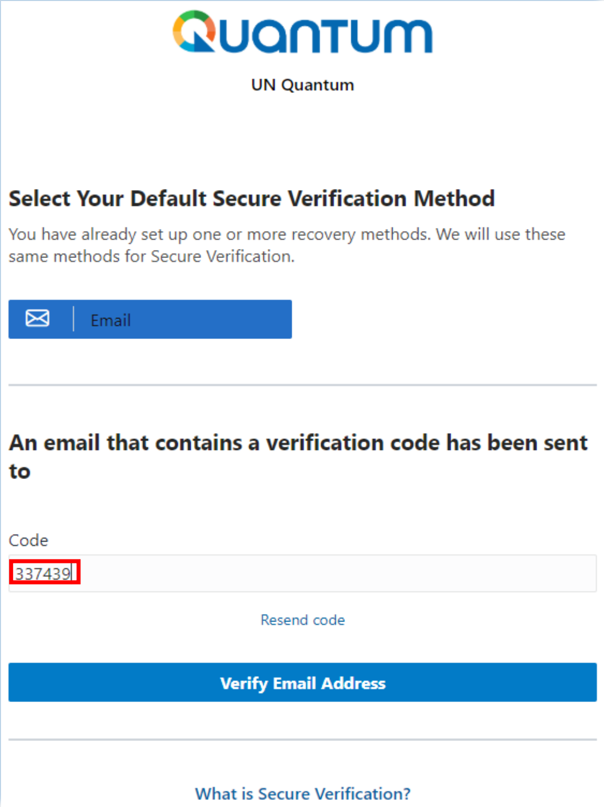
Action 4: Create password and login to the system (continued)

At this moment, the Quantum Supplier Portal offers the Secure Verification Method using the email address that you entered at the registration. Click on *Email.*



You will receive shortly an email to the email address registered with your profile a one-time passcode for your UN Quantum Supplier account. The passcode is valid for 30 minutes. Enter the conde and click on ***"Verify Email Address"***.

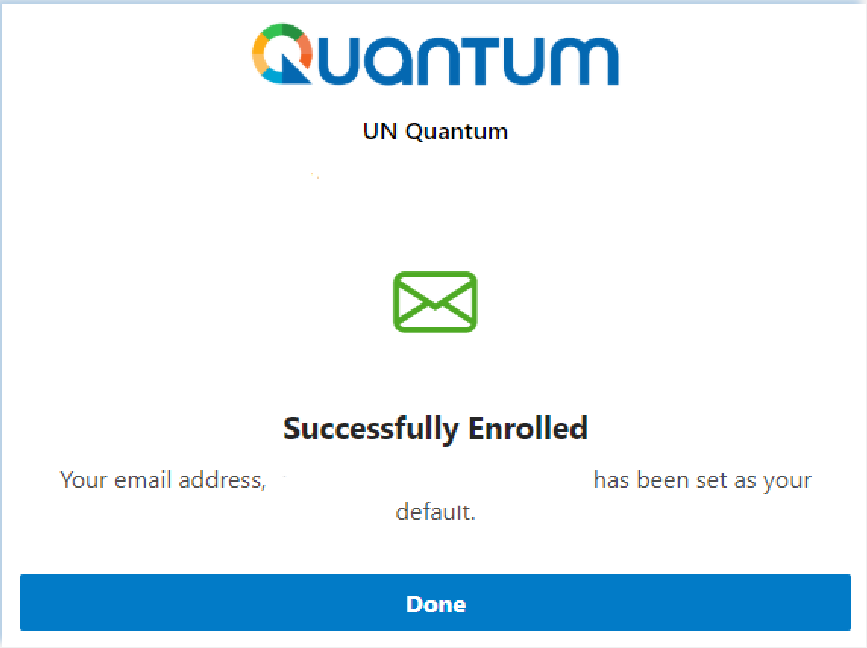




[Click to return to **Register Profile** Main Page]

Action 4: Create password and login to the system (continued)

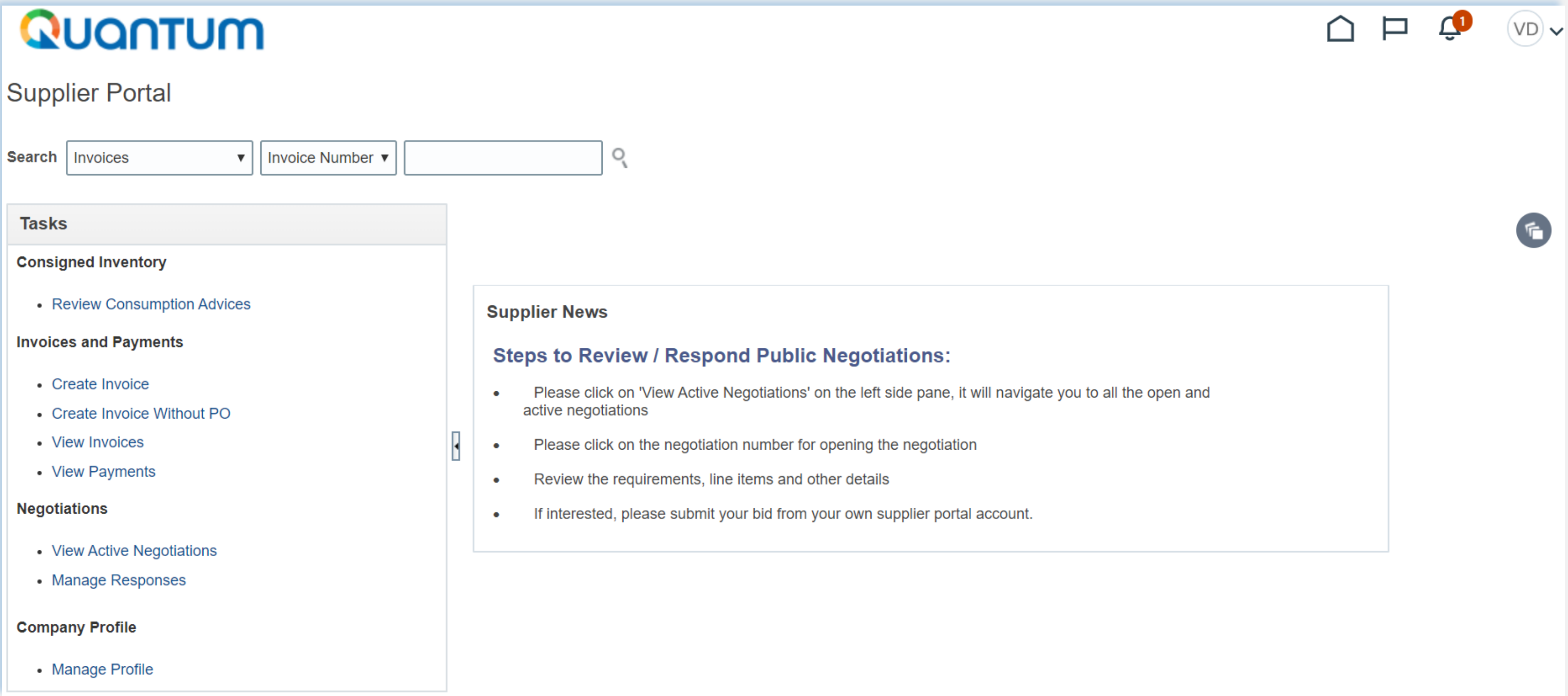
A confirmation message will pop-up on your screen. Click on "***Done***".



Click to return to **Register Profile** Main Page

Action 4: Create password and login to the system (continued)

You are now logged in to the Quantum Supplier Portal with your Supplier profile.



Click to return to **Register Profile** Main Page

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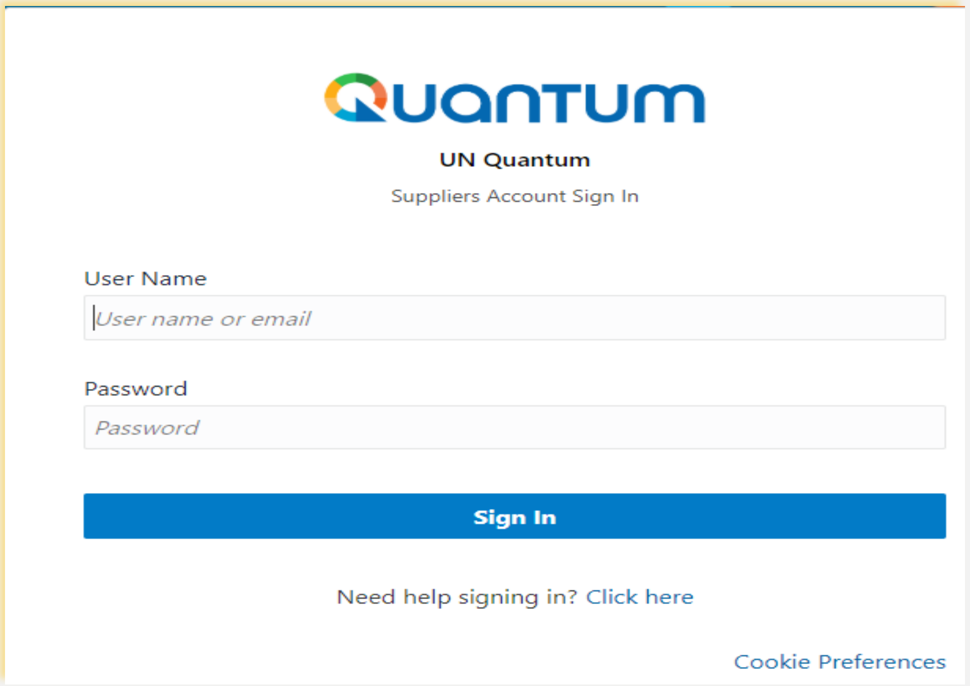
If you forget your password / How to generate new password

In case you forget the password of your profile on the Quantum Supplier Portal, please follow instructions provided here.



Click to return to
Register Profile
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3. Submit a Bid

Click to return to TOC

This section covers the bid submission process including how to search and view negotiations in the system, how to participate in a negotiation and prepare your bid response, and how to make the final bid submission and confirm that the bid has been submitted.

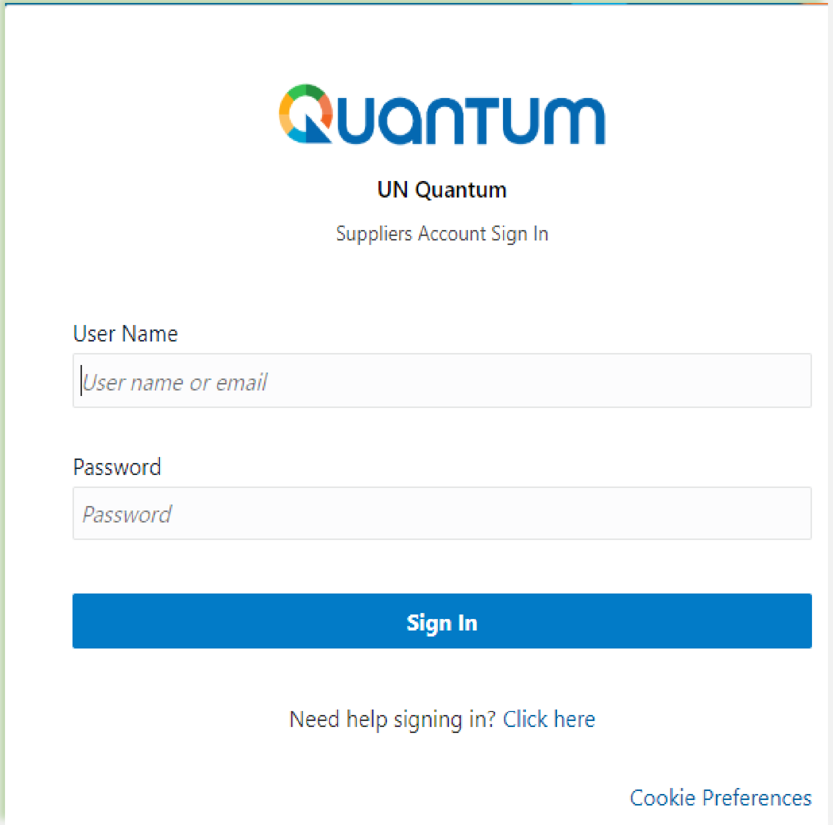
A Quick Guide to Submitting a Bid in Quantum

The main steps to submitting a bid in UNDP Quantum Supplier portal are as follows:

1. Search & view Negotiation
2. Accept Invitation/Subscribe to a tender/Create Response
3. Provide responses in the Requirements section
4. Upload documents
5. Insert price(s)
6. Review/Validate bid responses & submit bid

3.1 Search for Negotiations – Log in the system

To search for all UNDP Open Competition Tenders, please visit : UNGM, UNDP Procurement Notices
To start participating in a tender through the UNDP Quantum Supplier Portal, use the URL http://supplier.quantum.partneragencies.org and log in using your registered user ID (e-mail address) and password. Complete the steps for the MFA verification process.



IMPORTANT

If you are already registered in the system but do not remember your password, please do not register again.

If you have forgotten your password, use the option ***Need help signing in? Click here*** and complete the steps required for ***Forgot Password*** option.

Click to return to **Submit Bid** Main Page

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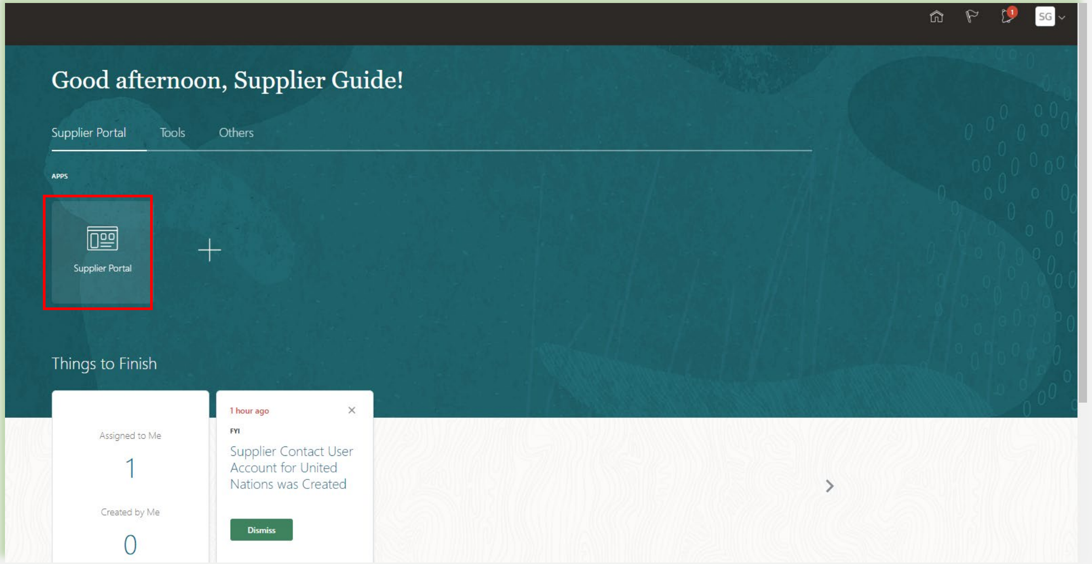
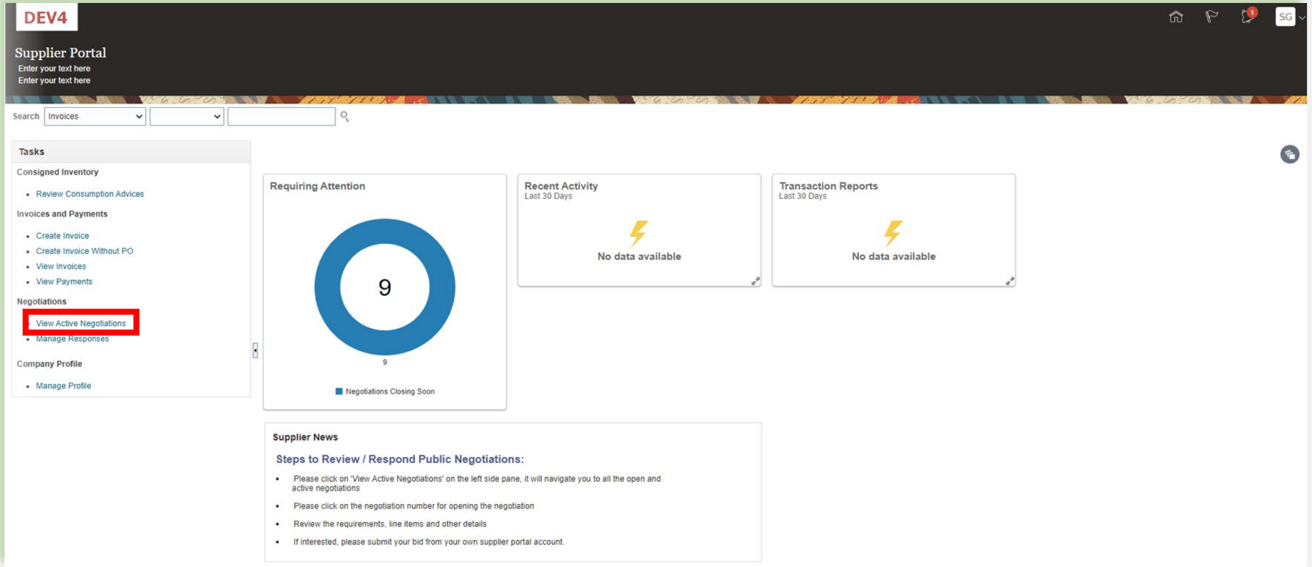
3.1 Search for Negotiations – Go to Search Page

Once you are logged in to your Supplier profile account, click on ***"Supplier Portal".***

Then, click the ***"View Active Negotiations"*** link.

Negotiation is a term used for a tender in the Oracle Cloud system.





Click to return to **Submit Bid** Main Page

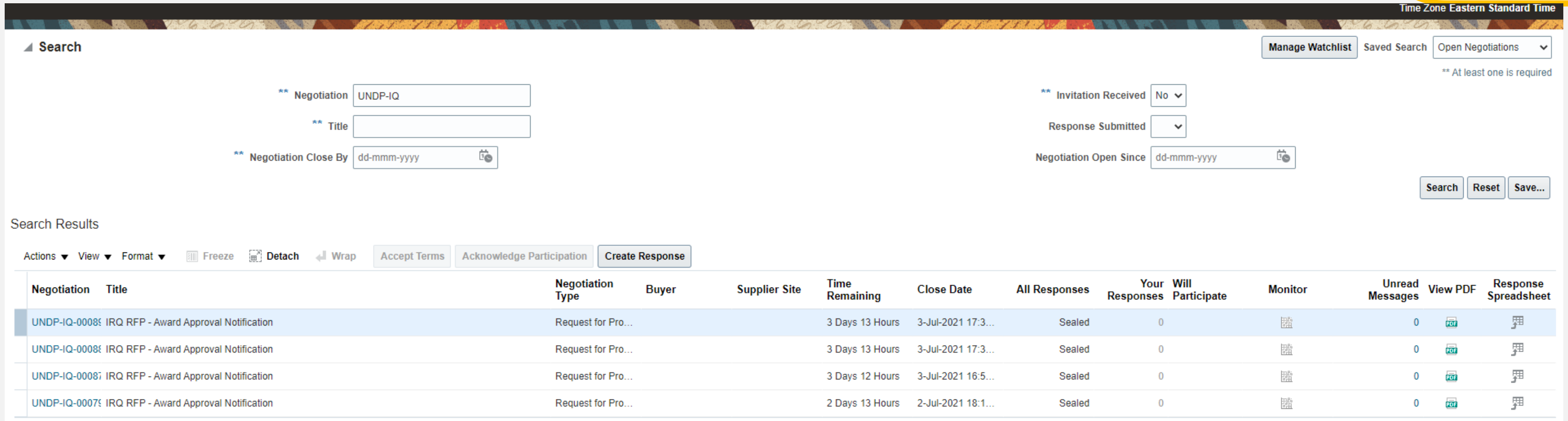
3.1 Search for Negotiations – Use search filters

All ongoing public tenders (negotiations) will be listed.
You can use the search engine to filter and view ongoing tenders by Negotiation ID, Title, Negotiation Open/Close dates or Invitation Received.

- Negotiation - The ID of the tender is indicated in the related procurement notice.
- Title – It is also indicated in the related procurement notice.
- Negotiation publishing dates and closure deadlines.
- Invitation Received – always leave it blank.

Example

To filter and view public tenders launched by UNDP in a specific Country, search by the three-digit country code (ISO country codes) e.g. Iraq, type UNDP-IRQ in the *"Negotiation"* field and leave blank in the field *"Invitation Received"*. Click on ***"Search"***. All results for ongoing tenders from Iraq will be displayed on the screen. The code for tenders issued y HQ units is UNDP-HQ

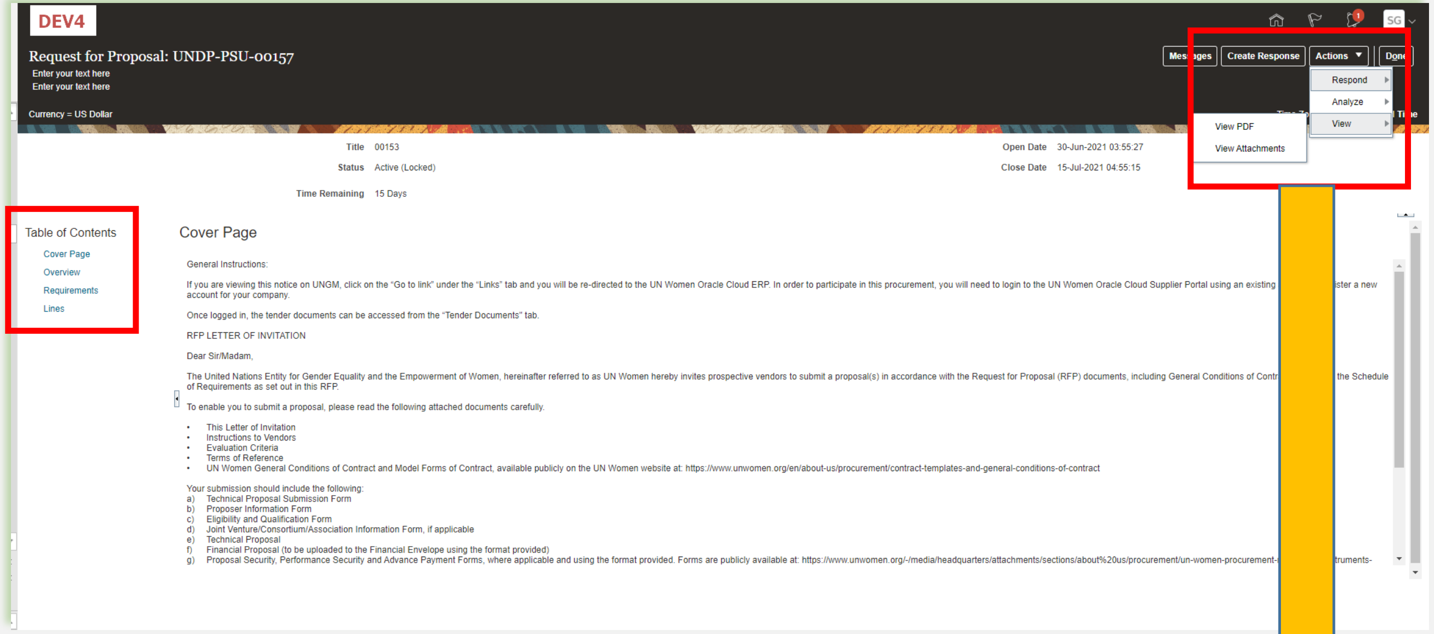


[Click to return to **Submit Bid** Main Page](Click to return to Submit Bid Main Page)

3.1 Search for Negotiations - View/Download attachments

Each negotiation in the system has multiple sections. To view each section, click on the corresponding link in the "*Table of Contents*".

Once you open the "*Overview section*", click on "*Expand All* "to see all the details.

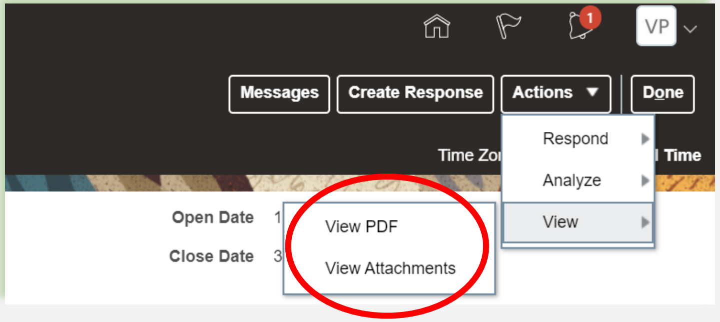


IMPORTANT

On each page the ***Open*** and ***Close*** date is presented. These dates are indicating the beginning of the solicitation period and the ***deadline for the bid submission.***

To view PDF version of the Negotiation, select the "***View PDF option"***.

To download the files attached to the Negotiation, click on the "***Actions"*** button. Then select "***View" >> "View Attachments".***



Click to return to **Submit Bid** Main Page

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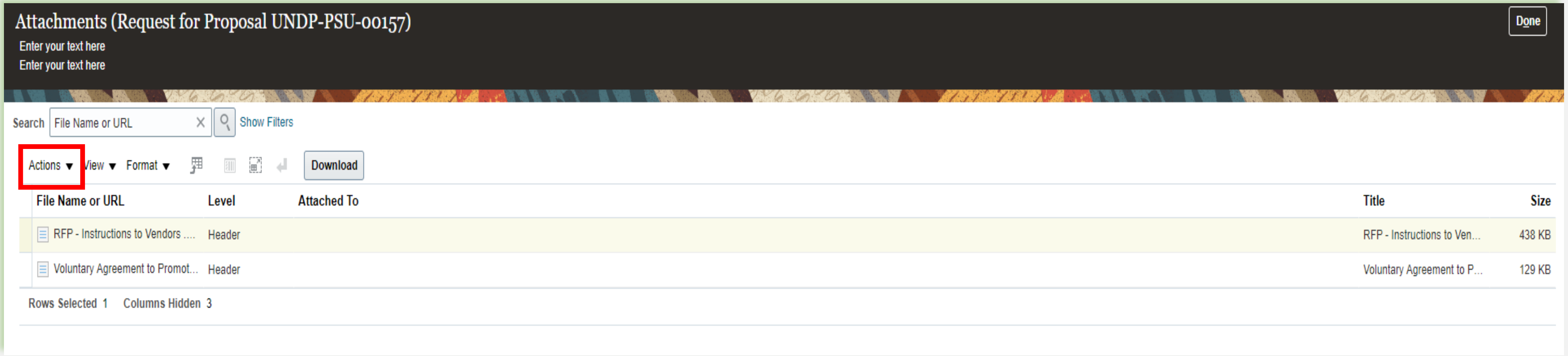
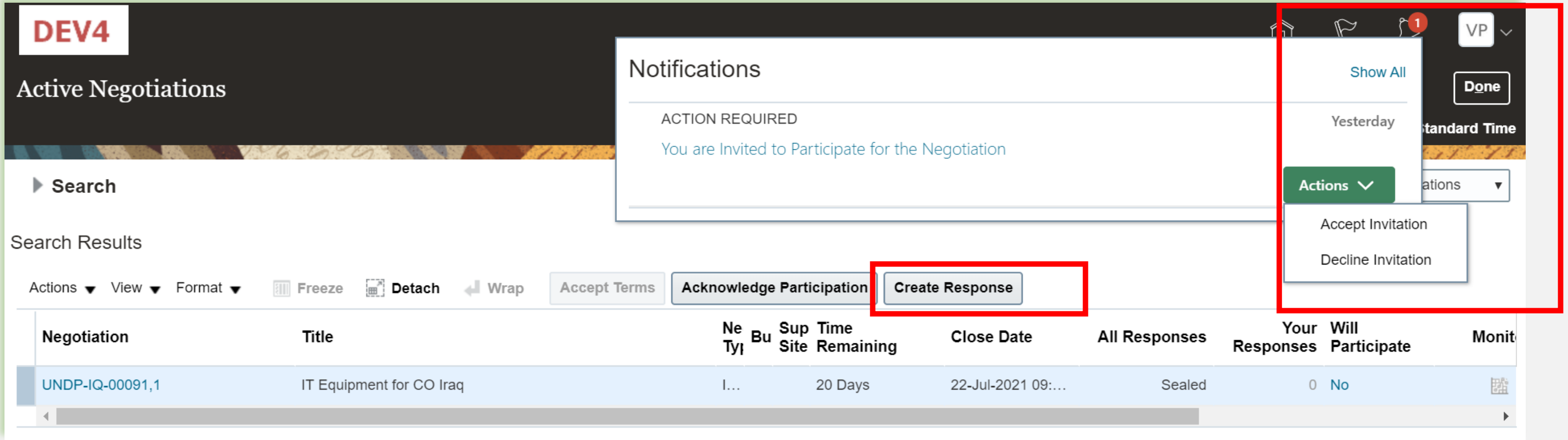
3.1 Search for Negotiations- View negotiation/Download attachments



All files attached to the negotiation are listed on the “***Attachments”*** page. To download all attachments, click the “***Actions”*** button and then select the option ***“Download All”.*** The attachments will be downloaded in a zip folder, which may contain several sub-folder with attachments. Open the zip folder with an appropriate application and unzip (unpack) the folder(s).

Click to return to **Submit Bid** Main Page

3.2 Accept invitation for a closed competition negotiation



TIP

It is very important to subscribe to an ongoing negotiation that you are interested to participate. This is the only way to receive automatic e-mail notifications with the information on any changes related to that tender.

After you login the system, there are two ways **to accept the invitation**:

1) On the "***Search"*** page, select the option "***Yes"*** in the "***Invitation Received"*** field and click the "***Search"*** button. Identify/Select the Negotiation for the tender in question and click the button "***Acknowledge Participation"***.

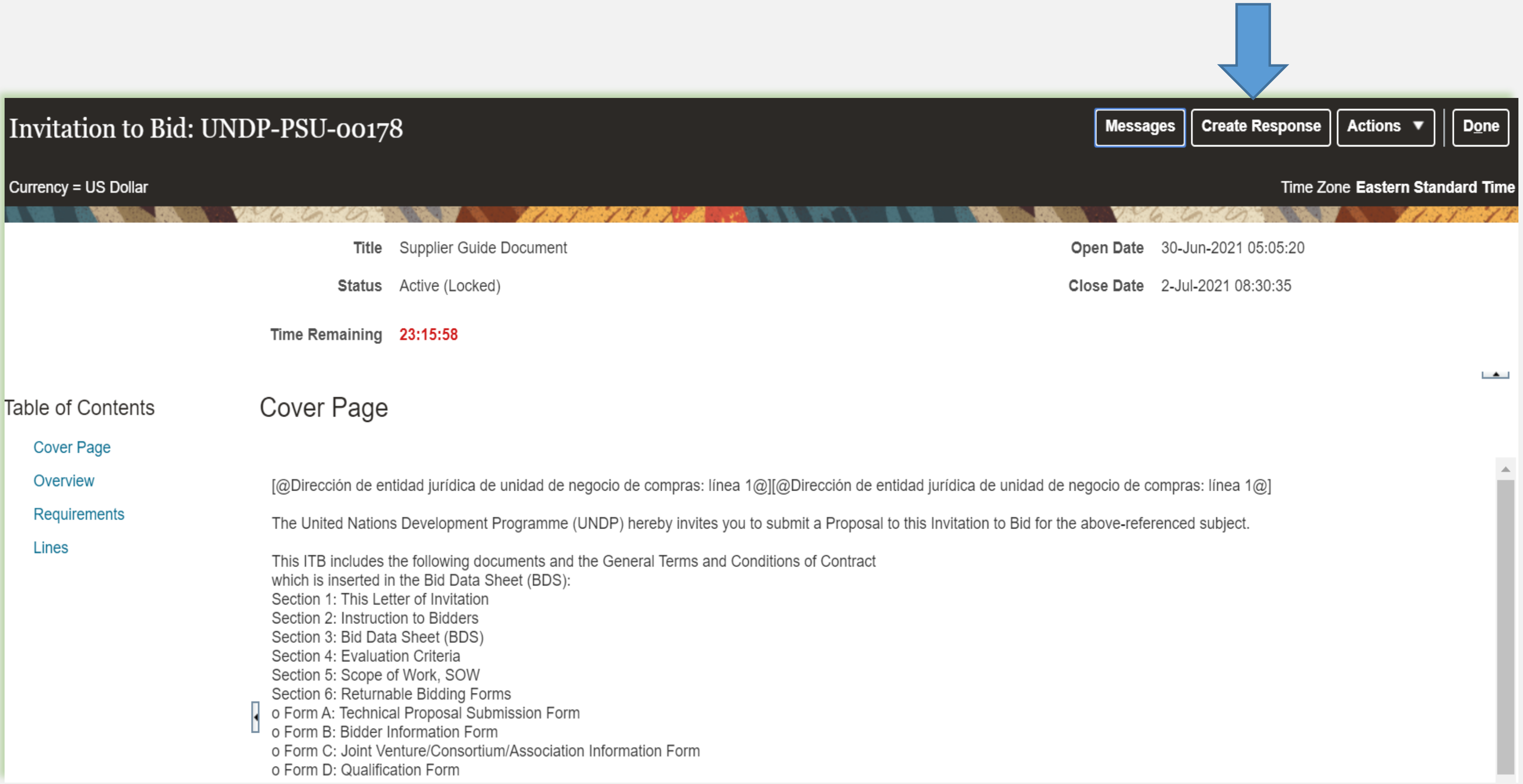
2) Click the "***Notifications"*** icon, identify the corresponding notification, click on the "***Actions"*** button and select the option "Accept Invitation" form the dropdown menu.

To decline the invitation**,** select the option "***Decline Invitation***" in the same dropdown menu.

Click to return to **Submit Bid** Main Page

3.2 Subscribe to a Public Negotiation

To subscribe to a negotiation, please click on "***Create Response***" button. Then, click the button "***Save***" and the draft bid response will be created/saved. You can continue working on the draft response at any moment during the solicitation period



Click to return to **Submit Bid** Main Page

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3.2 Participate in Negotiations –Key Components of an online Bid

In order to submit a bid in the supplier portal, suppliers are usually required to complete the following 3 key processes:

- Answer the questions in the ***Requirements*** section and upload supporting documents
- Insert unit prices for the items required.
- Validate and submit the bid response

Follow the instructions in the guide to complete your bid.

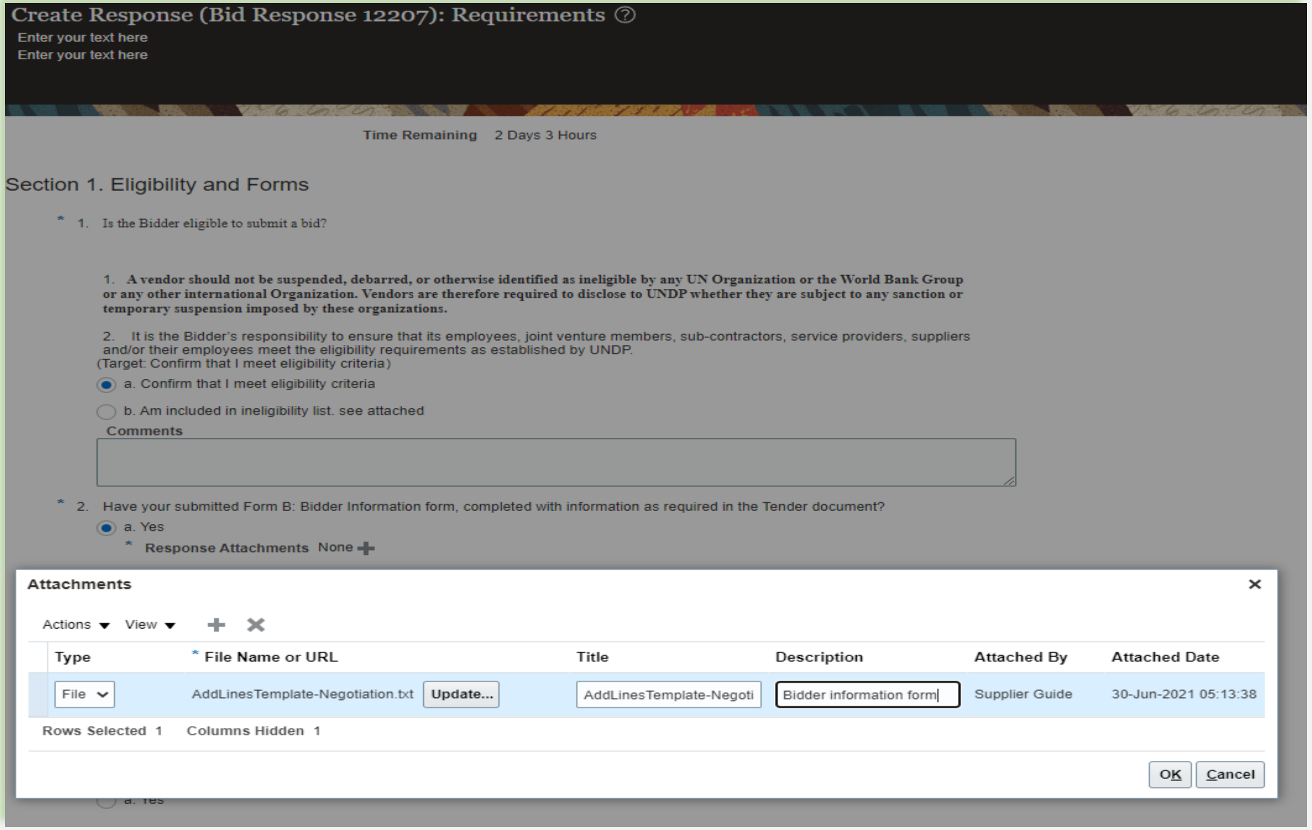
Tip

Use the **Save/Save and close** function to save the progress of your bid response. After some time of inactivity, the system times out and you may lose any unsaved changed to your bid. Therefore, use frequently the Save function.

Click to return to **Submit Bid** Main Page

3.2 Prepare Bid Response – Provide responses in the Requirements section

Suppliers will be prompted to answer negotiation questions (Requirements) that will be used in the final evaluation and awarding of the tender. The questions may vary by the type of response that is required. Some will require a "**yes/no**" response, others may require typed/textual answers, or numerical input. Please read each question carefully before submitting your response



IMPORTANT

Response Required: When a question is marked by a star, it means that answering the question is mandatory to submit a bid response.

Tip

Some questions may already be answered. These questions were part of the registration process and the answers that you provided automatically appear in your bid response. You may revise your answers if necessary to update the information.

Click to return to **Submit Bid** Main Page

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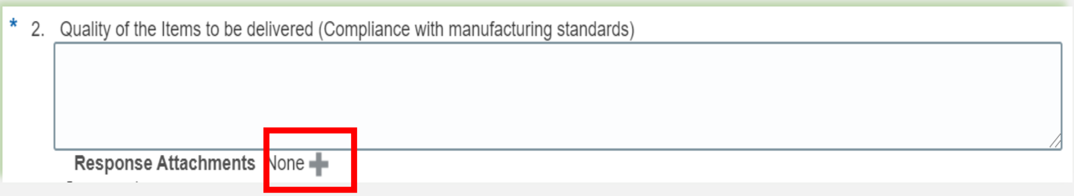
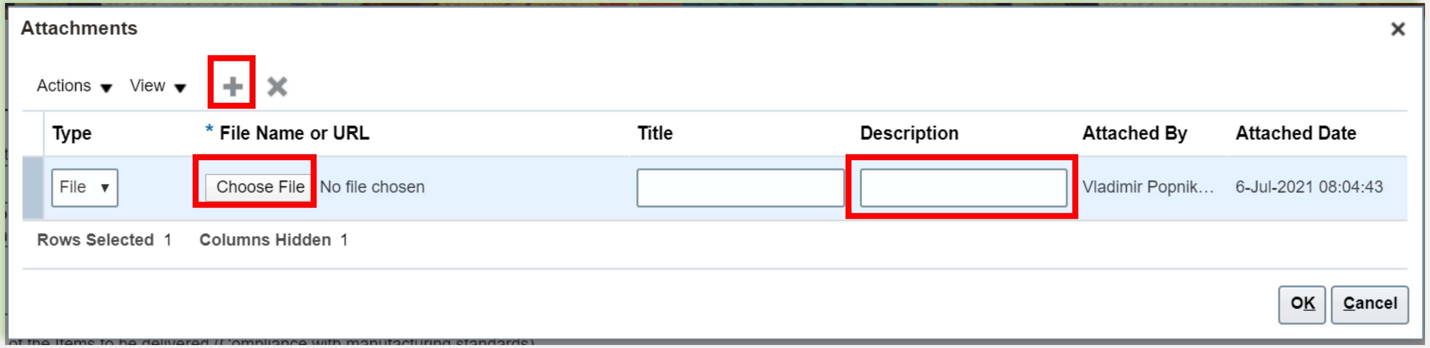
QUANTUM

3.2 Prepare Bid Response – Upload supporting documents

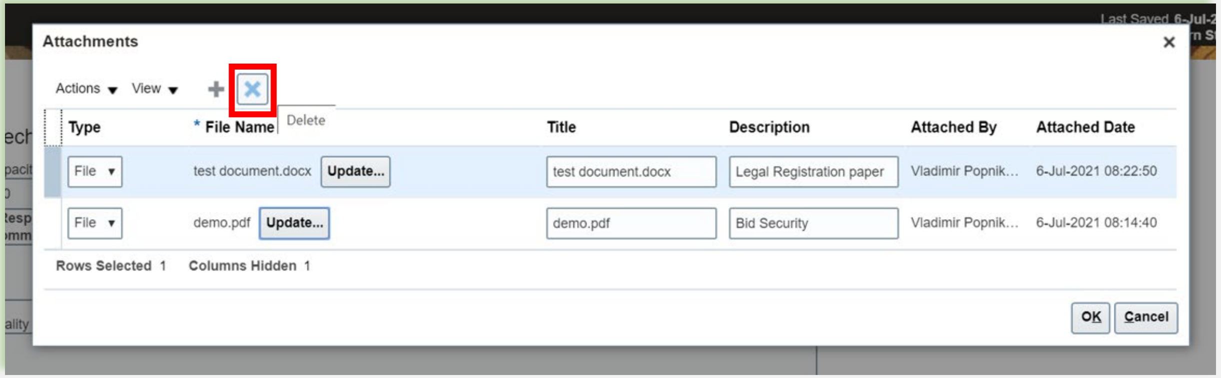


For some of the questions in the Requirements Section you may be asked to upload supporting documents in addition to your response. To upload the files, click on the **+** icon.



Click the **+** button to add an attachment. Then, click the **"Choose File"** button and select the file on your computer that you wish to upload/attach. Once the file is uploaded, enter the description.

To add more attachments, click the **+** button and repeat the same process for each file.



To delete an uploaded file, first select the file by clicking on the appropriate row. The selected row becomes highlighted (in light blue). Then, click the **X** icon.

To go back to the previous screen, click OK.

Click to return to **Submit Bid** Main Page

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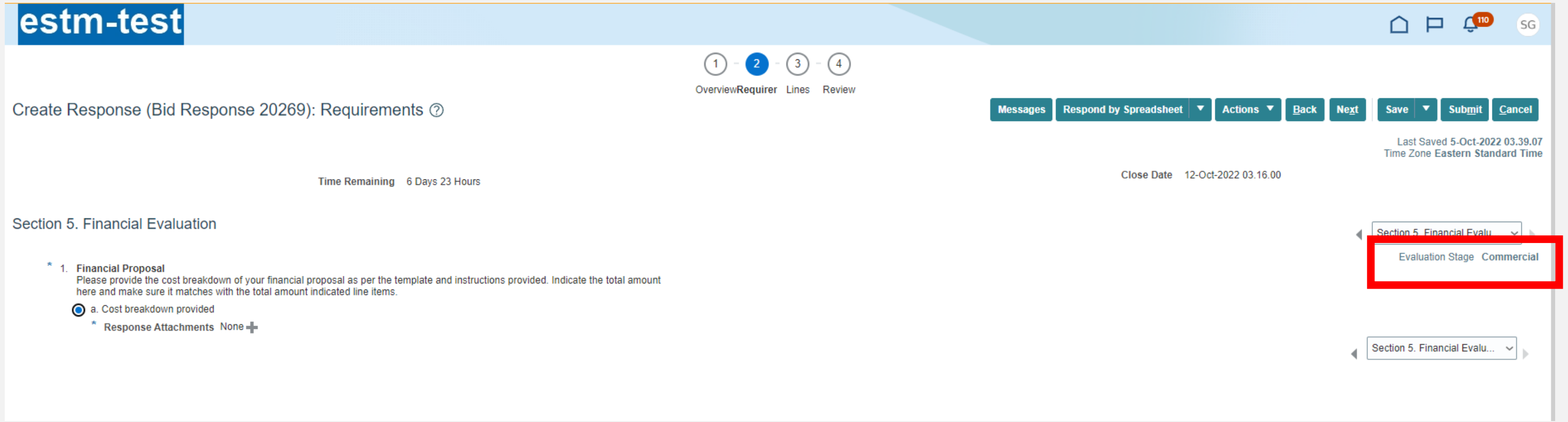
3.2 Prepare Bid Response – Financial information for Request for Proposals

For Negotiations that are Request for Proposals (Two envelop procurement method), there will be two evaluation stages – Technical and Commercial.
The portal maintains two envelops through these stages. Information posted in the stage marked as “Commercial” is not disclosed until technical evaluation is completed and financial are opened for only those suppliers that pass the technical evaluation.

IMPORTANT

Do not enter any information/ attachment related to financial proposal or total cost/value of the proposal in evaluation stage marked as “Technical”.



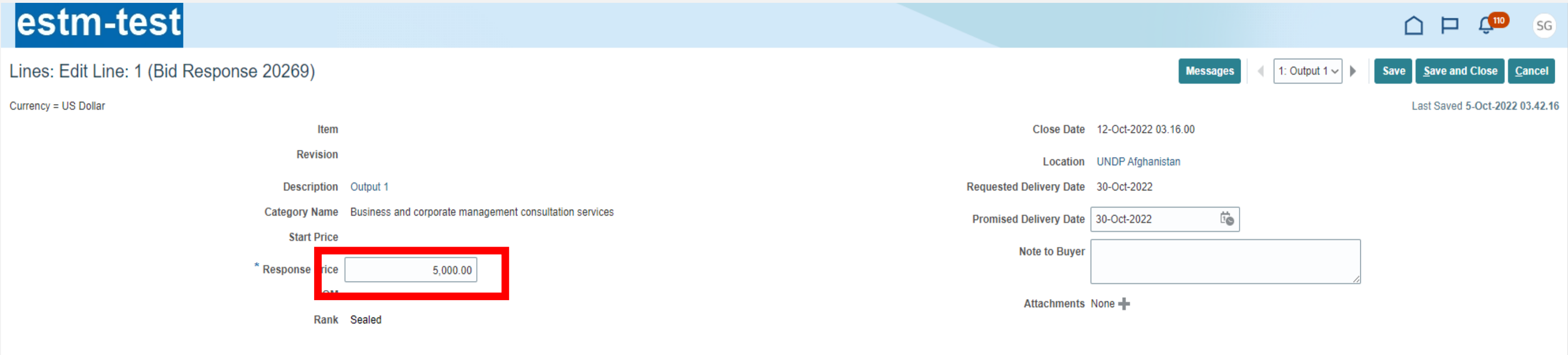
Click to return to **Submit Bid** Main Page

3.2 Prepare Bid Response – Financial information for Request for Proposals

Never put **1** for the "**Response Value**" but enter the total value of your proposal OR as instructed in the Negotiation. Please see below two examples:

1. Breakdown of outputs

2. Total bid price



Click to return to **Submit Bid** Main Page

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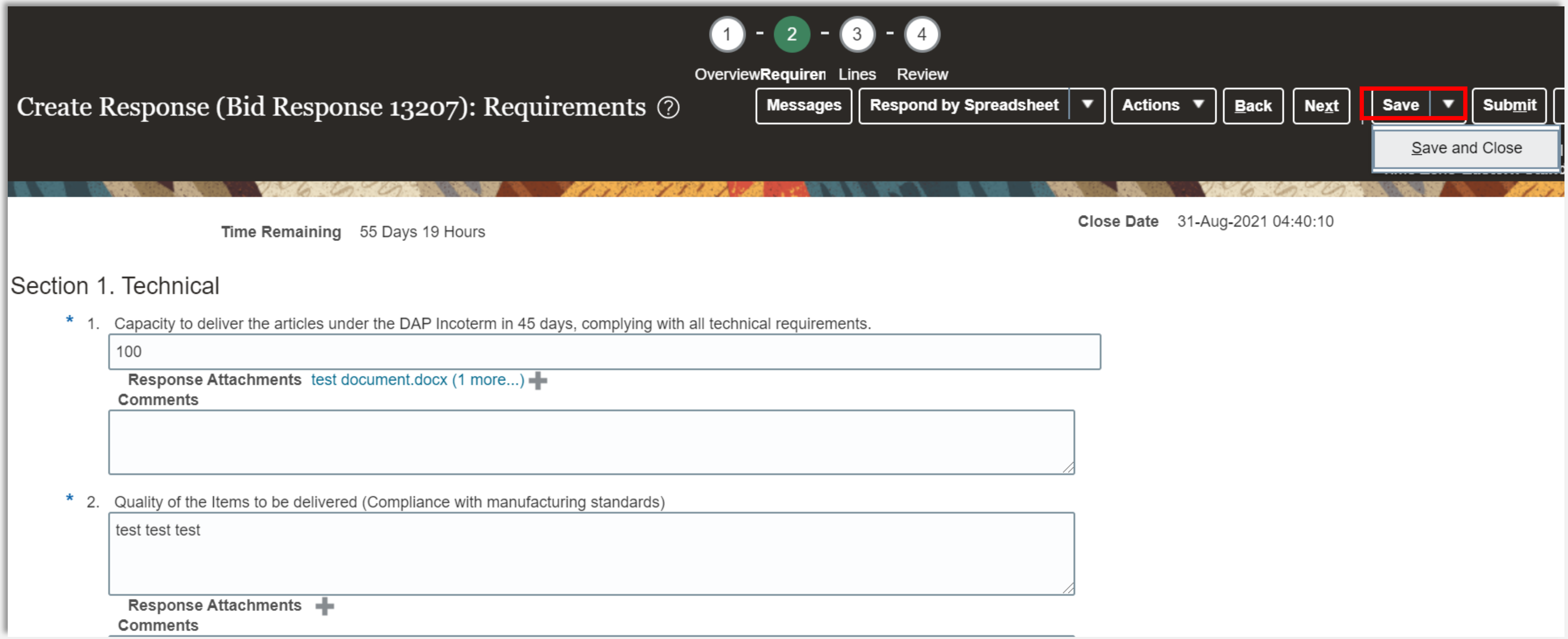
3.2 Prepare Bid Response – Save for later

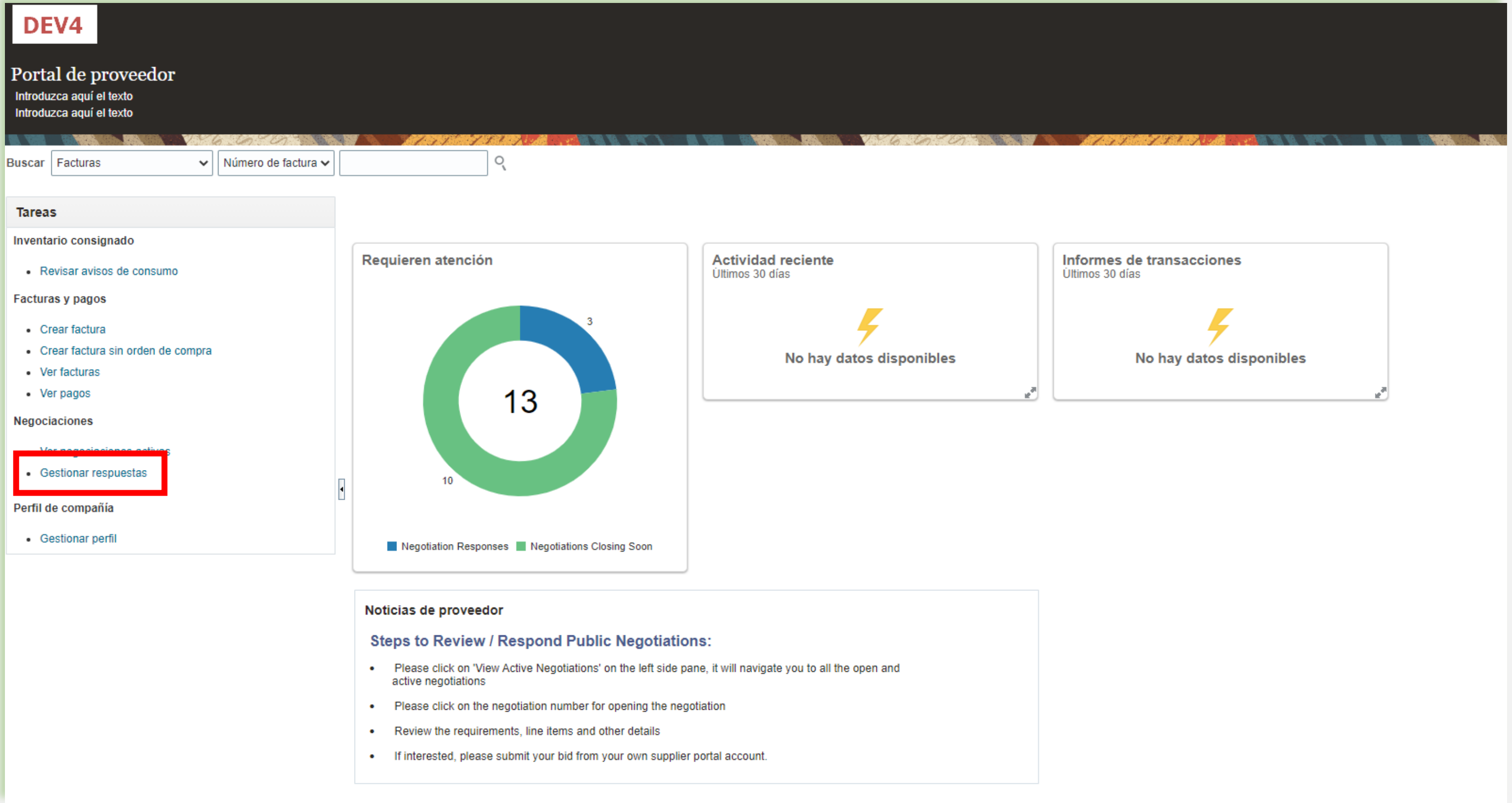
You can save your bid response and come back later to add additional information. Click on “***Save or Save and close”.***



Click to return to **Submit Bid** Main Page

3.2 Prepare Bid Response – Save for later

To open a saved draft bid response and continue with the completion of the bid, click on ***Manage Responses.***



IMPORTANT

Be aware that saving your bid for later does not submit it in the system. To submit your bid, you must click on ***"Submit Bid"***.

Click to return to **Submit Bid** Main Page

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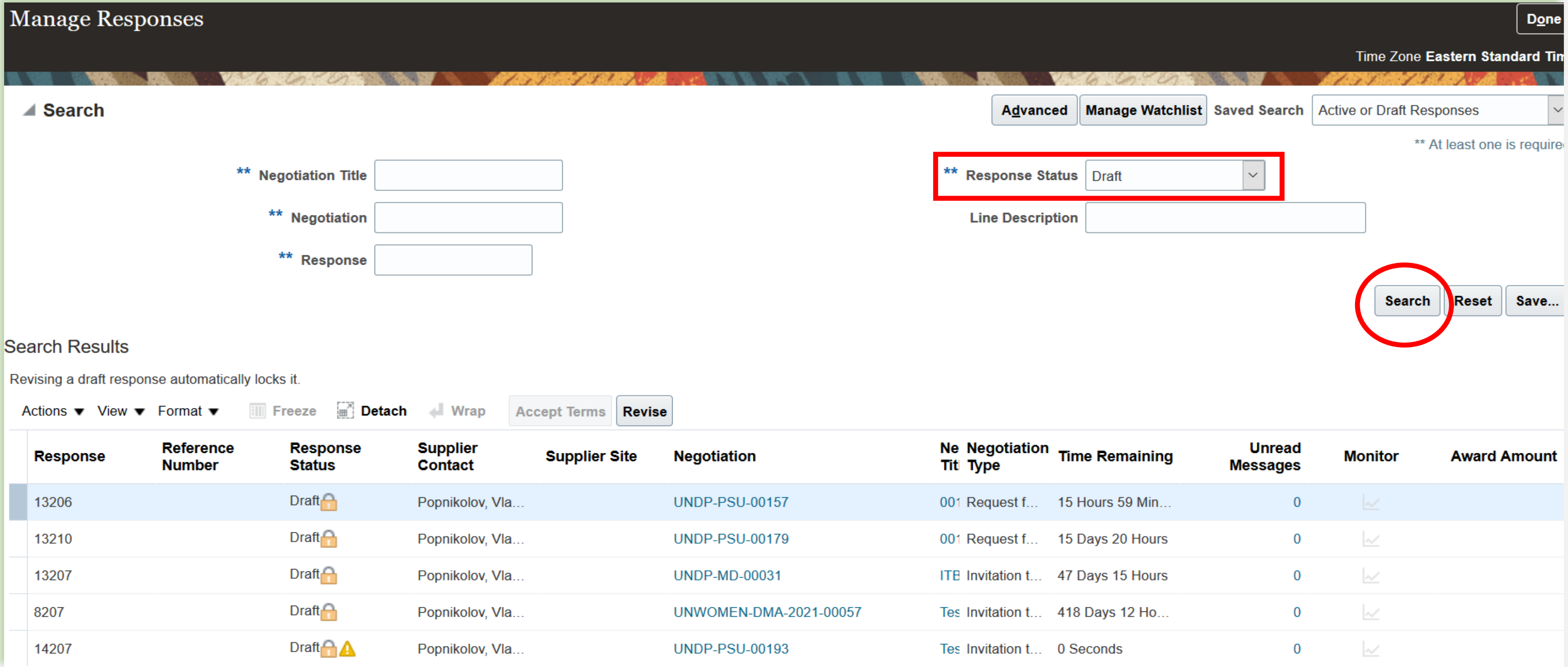
3.2 Prepare Bid Response – Save for later

Select the option ***Draft*** in the field "***Response status***" and click the button ***"Search".*** All bid responses which are saved but not submitted will be listed. In the column ***Negotiation*** the ID of the negotiation is displayed. This will help you to identify the tender/draft bid response that you wish to complete.



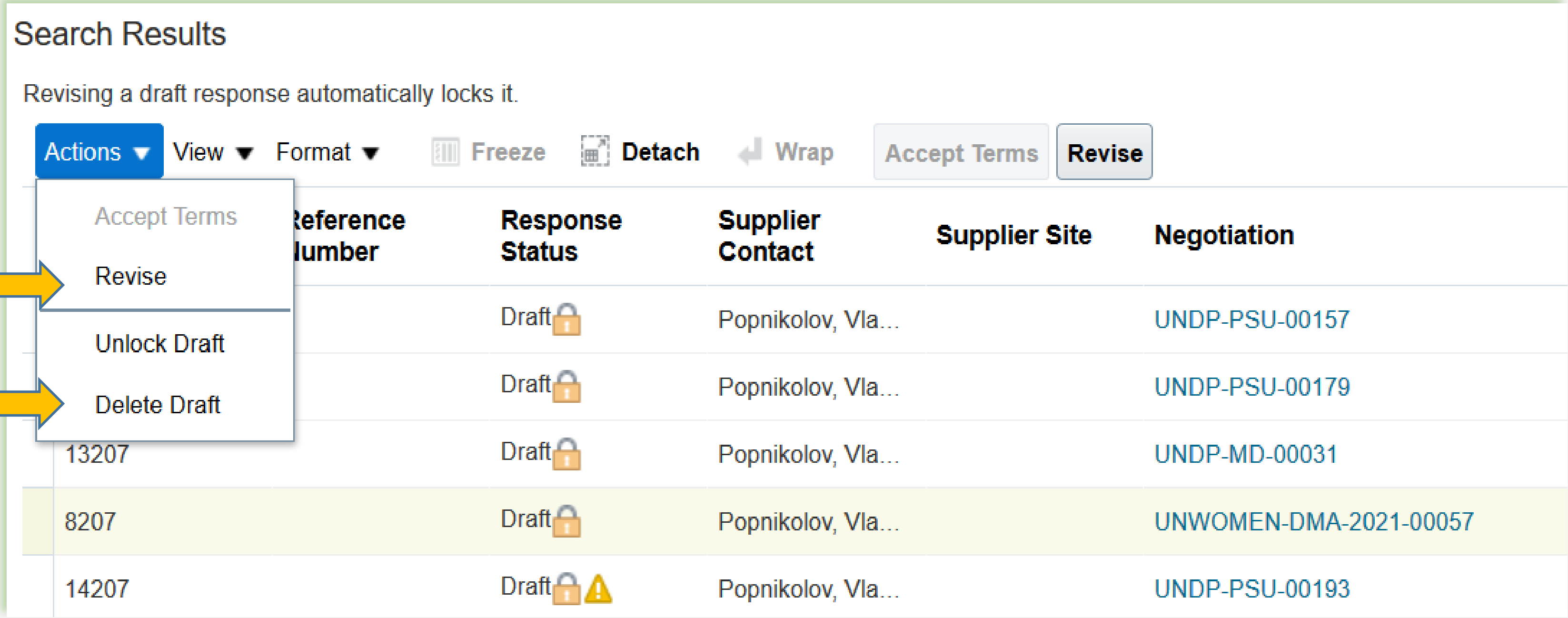
Click to return to **Submit Bid** Main Page

3.2 Prepare Bid Response – Save for later

Identify the bid response that you wish to continue to work on and select it.
Click ***Actions.***

To continue working on your draft bid response and complete it, click the option “***Revise”.***

To delete the draft response and create new draft bid response from scratch, click the option ***Delete Draft***.



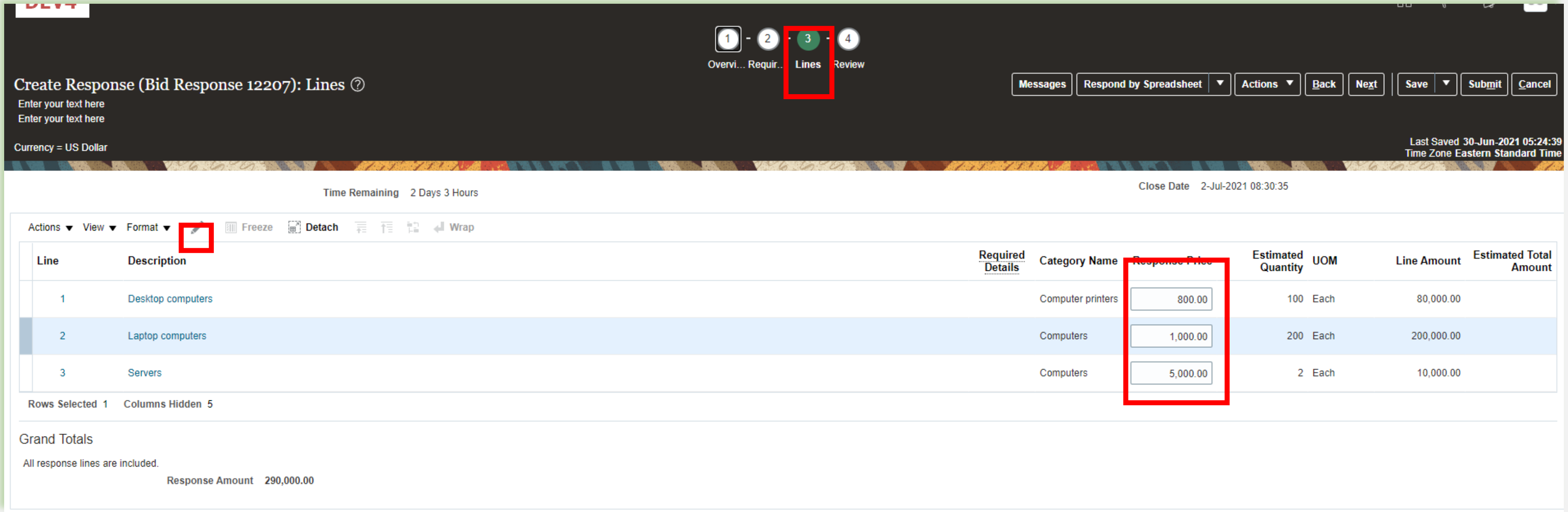
[Click to return to **Submit Bid** Main Page]

3.2 Prepare Bid Response – Insert price(s)

To enter your price offer on the Line Item(s), click on the ***Lines*** step of the bid response.

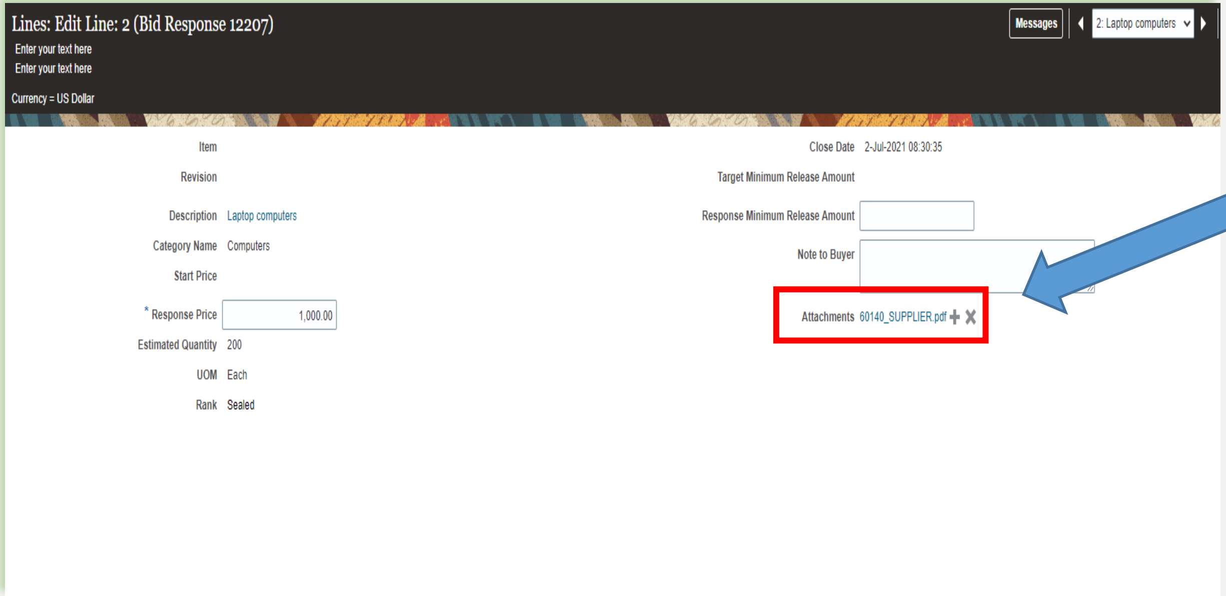
Enter your price offer in the "***Response Price***" field for each Line Item that you wish to bid.

You can add attachments on the Line Item level. Select the Line Item (it should become highlighted in light blue) and click the **Edit** icon.

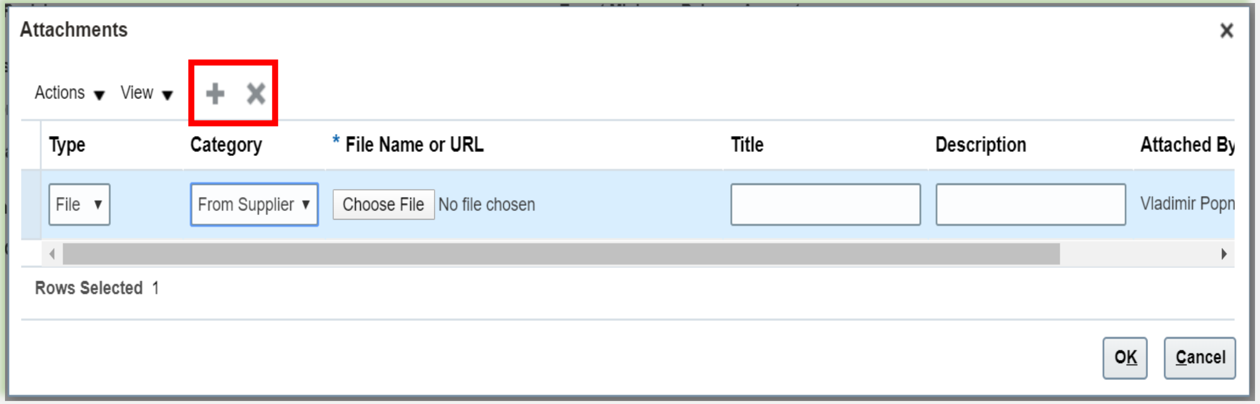


Click to return to **Submit Bid** Main Page

3.2 Prepare Bid Response – Insert price(s)



To add attachments on the Line Items level click the **+** icon on the Attachment field.



Click the **+** button to add an attachment. Then, click the "Choose File" button and select the file on your computer that you wish to upload/attach. Once the file is uploaded, enter the description.

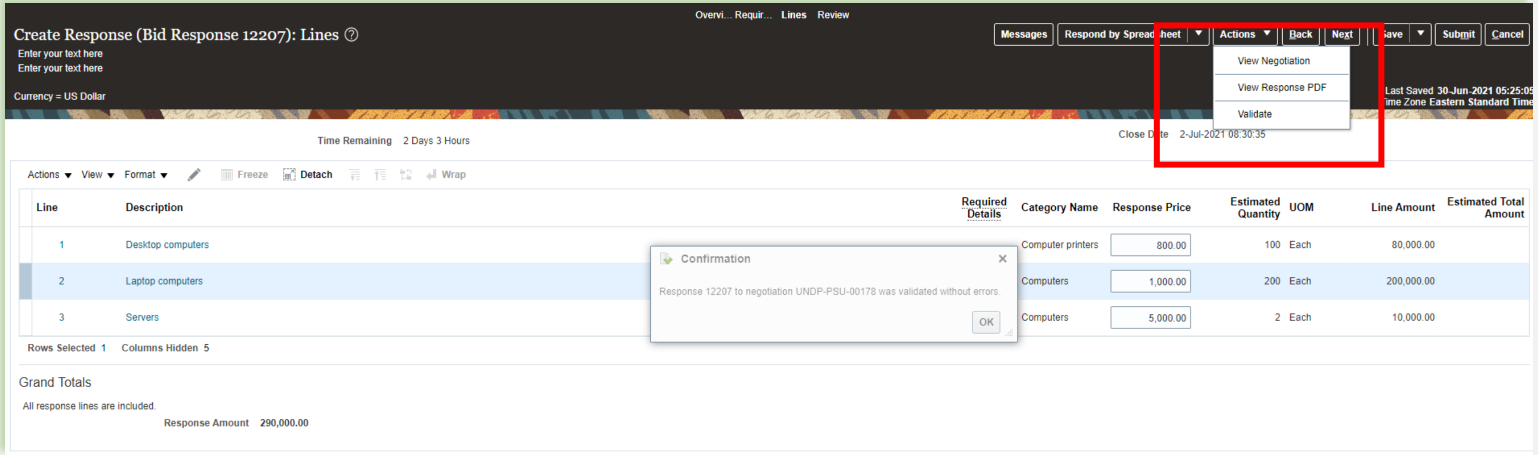
To **add more attachments**, click the **+** button and repeat the same process for each file.

To **delete an uploaded file**, first select the file by clicking on the appropriate row. The selected row becomes highlighted (in light blue). Then, click the X icon.

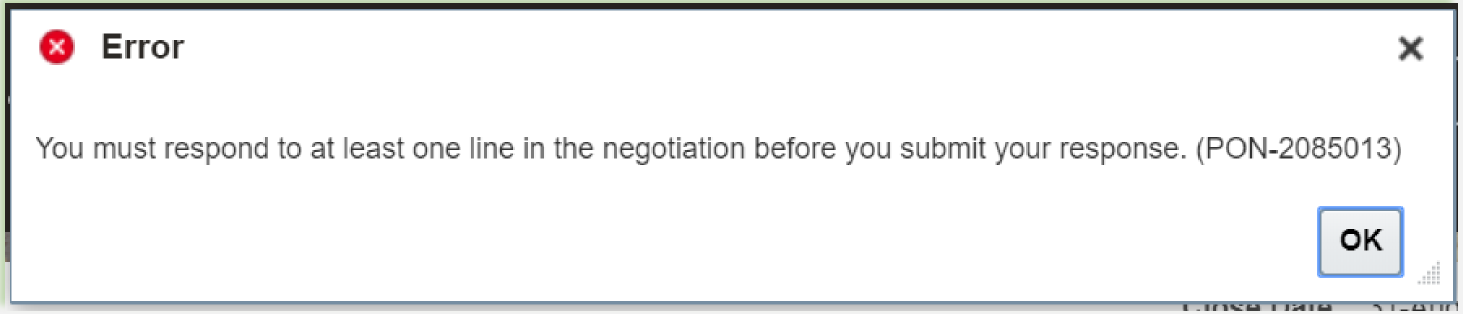
To go back to the previous screen, click ***"OK"***.

Click to return to **Submit Bid** Main Page

3.3 Submit Bid – Validate the bid response



You can validate the bid response prior to the submission. Click the "***Actions***" button and select the option Validate from the dropdown list.
The system will perform a validation of the bid response.
If no errors are identified, you can proceed with the submission.



If the validation process identified an issue with the bid response (e.g., missing mandatory data), an error message will pop up and inform you what exactly is not correct on the bid response (e.g., which data is missing).

Click to return to **Submit Bid** Main Page

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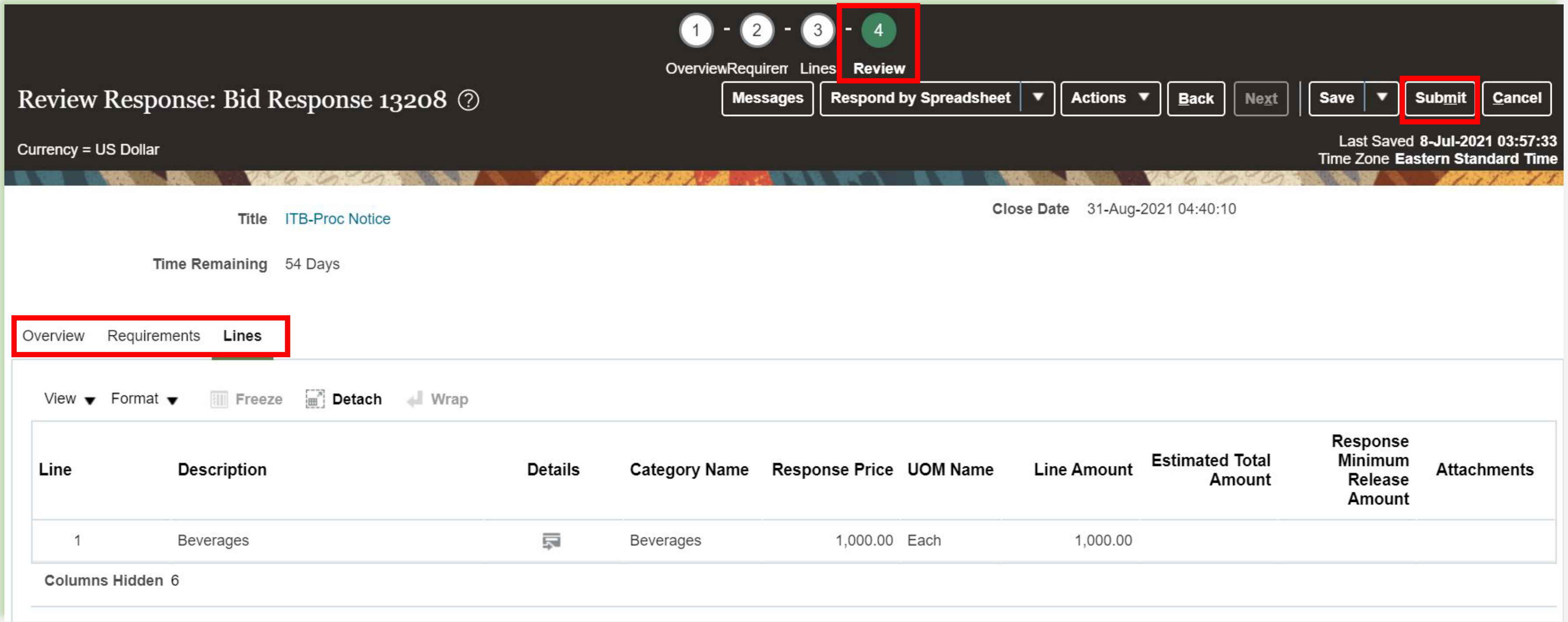
3.3 Submit Bid – Review and Submit Bid Response

You can review your bid response by clicking "Review". Then click on different Sections to view the entered info. Once your bid is complete and your responses have been validated, click on “***Submit”*** to post it in the system.

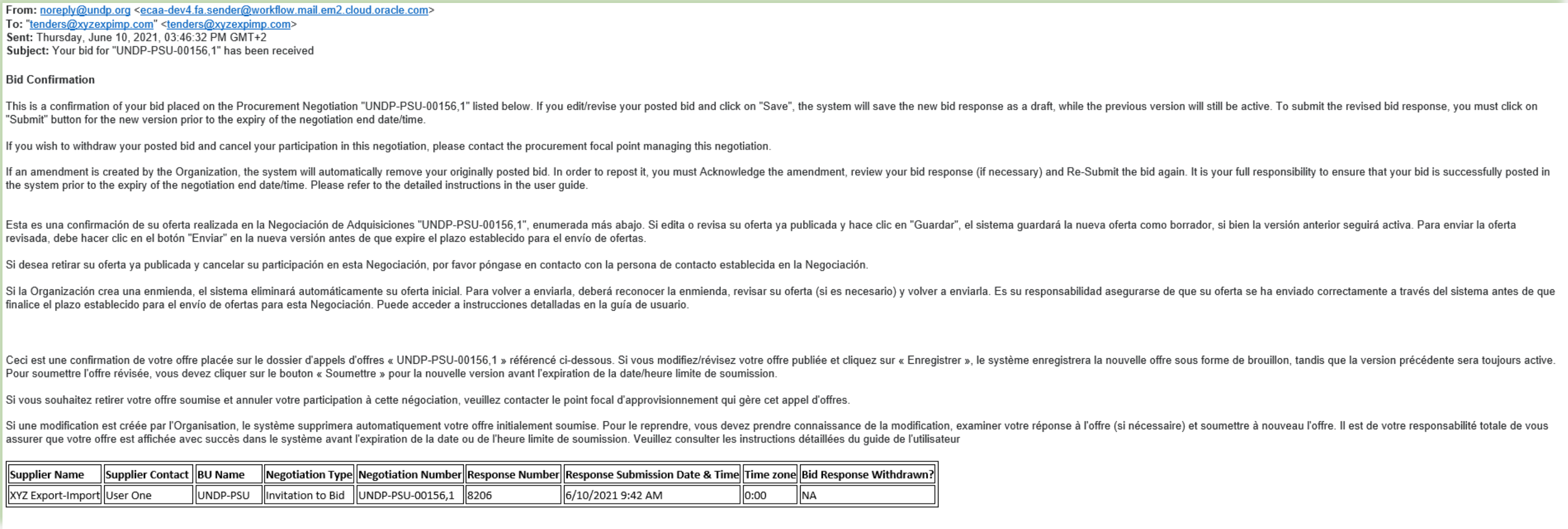


Click to return to **Submit Bid** Main Page

3.3 Submit Bid – Submit Bid Response

A confirmation message will pop up on your screen informing you that the bid response was submitted.

You will also receive an automatically generated e-mail notification confirming that the bid response was submitted.



From: noreply@undp.org <ecaa-dev4.fa.sender@workflow.mail.em2.cloud.oracle.com>
To: "tenders@xyzexpimp.com" <tenders@xyzexpimp.com>
Sent: Thursday, June 10, 2021, 03:46:32 PM GMT+2
Subject: Your bid for "UNDP-PSU-00156,1" has been received

Bid Confirmation

This is a confirmation of your bid placed on the Procurement Negotiation "UNDP-PSU-00156,1" listed below. If you edit/revise your posted bid and click on "Save", the system will save the new bid response as a draft, while the previous version will still be active. To submit the revised bid response, you must click on "Submit" button for the new version prior to the expiry of the negotiation end date/time.

If you wish to withdraw your posted bid and cancel your participation in this negotiation, please contact the procurement focal point managing this negotiation.

If an amendment is created by the Organization, the system will automatically remove your originally posted bid. In order to repost it, you must Acknowledge the amendment, review your bid response (if necessary) and Re-Submit the bid again. It is your full responsibility to ensure that your bid is successfully posted in the system prior to the expiry of the negotiation end date/time. Please refer to the detailed instructions in the user guide.

Esta es una confirmación de su oferta realizada en la Negociación de Adquisiciones "UNDP-PSU-00156,1", enumerada más abajo. Si edita o revisa su oferta ya publicada y hace clic en "Guardar", el sistema guardará la nueva oferta como borrador, si bien la versión anterior seguirá activa. Para enviar la oferta revisada, debe hacer clic en el botón "Enviar" en la nueva versión antes de que expire el plazo establecido para el envío de ofertas.

Si desea retirar su oferta ya publicada y cancelar su participación en esta Negociación, por favor póngase en contacto con la persona de contacto establecida en la Negociación.

Si la Organización crea una enmienda, el sistema eliminará automáticamente su oferta inicial. Para volver a enviarla, deberá reconocer la enmienda, revisar su oferta (si es necesario) y volver a enviarla. Es su responsabilidad asegurarse de que su oferta se ha enviado correctamente a través del sistema antes de que finalice el plazo establecido para el envío de ofertas para esta Negociación. Puede acceder a instrucciones detalladas en la guía de usuario.

Ceci est une confirmation de votre offre placée sur le dossier d'appels d'offres « UNDP-PSU-00156,1 » référencé ci-dessous. Si vous modifiez/révisez votre offre publiée et cliquez sur « Enregistrer », le système enregistrera la nouvelle offre sous forme de brouillon, tandis que la version précédente sera toujours active. Pour soumettre l'offre révisée, vous devez cliquer sur le bouton « Soumettre » pour la nouvelle version avant l'expiration de la date/heure limite de soumission.

Si vous souhaitez retirer votre offre soumise et annuler votre participation à cette négociation, veuillez contacter le point focal d'approvisionnement qui gère cet appel d'offres.

Si une modification est créée par l'Organisation, le système supprimera automatiquement votre offre initialement soumise. Pour le reprendre, vous devez prendre connaissance de la modification, examiner votre réponse à l'offre (si nécessaire) et soumettre à nouveau l'offre. Il est de votre responsabilité totale de vous assurer que votre offre est affichée avec succès dans le système avant l'expiration de la date ou de l'heure limite de soumission. Veuillez consulter les instructions détaillées du guide de l'utilisateur

Supplier Name	Supplier Contact	BU Name	Negotiation Type	Negotiation Number	Response Number	Response Submission Date & Time	Time zone	Bid Response Withdrawn?
XYZ Export-Import	User One	UNDP-PSU	Invitation to Bid	UNDP-PSU-00156,1	8206	6/10/2021 9:42 AM	0:00	NA

Click to return to **Submit Bid** Main Page

QUANTUM

3.4 Prepare a Bid Submission Offline – Submit Bid in .XML

Suppliers have the option to prepare their bid responses offline by downloading the entire negotiation package to their computer in .XML file format.

The .XML file negotiation package will contain all the questions from the Requirements Section and the Line items that must be completed by the suppliers before submitting their bid online.

To do this, the Supplier must download the .XML file, save it as an excel file to their computer, complete required fields, and then upload their bid response to the negotiation in the system.

Please note that if you choose this optional method of submitting your bid, you must also ensure that you have also uploaded all the necessary supporting documents directly to the system before submitting your bid.

Click to return to **Submit Bid** Main Page

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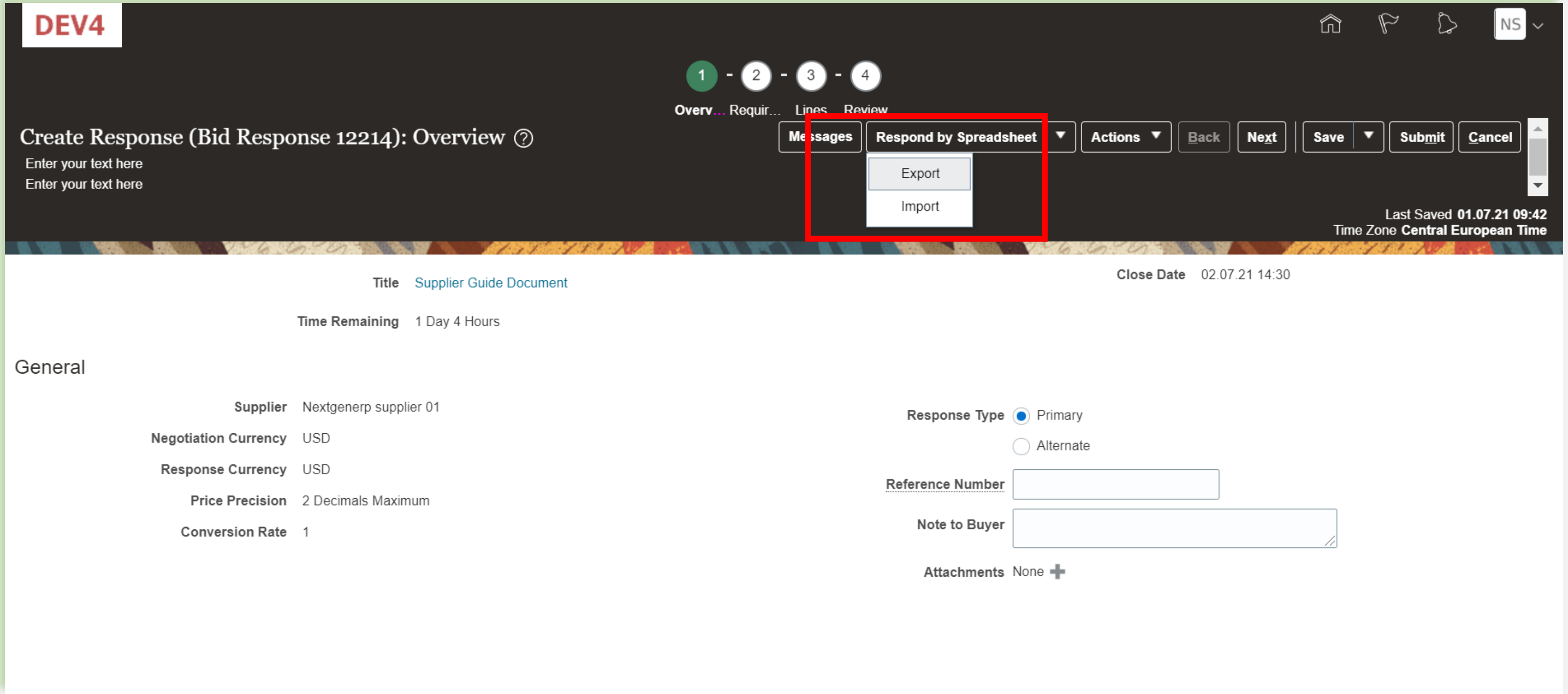
3.4 Prepare Bid Response Offline - Export/Download XML file

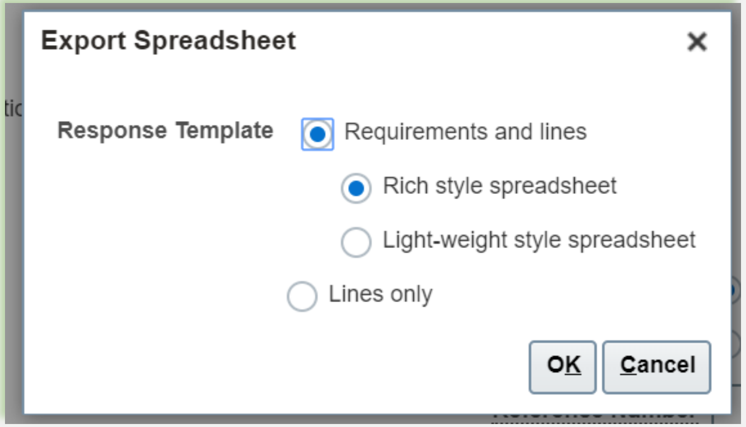
To begin preparing your bid response offline, you must first export/download the .XML file to your computer. To export the .XML file, open the negotiation in question, click the **"Create Response"** button and click "Save". Then, click the button **"Response by Spreadsheet"** and from the dropdown list select the option **"Export"**.



Click to return to **Submit Bid** Main Page

3.4 Prepare Bid Response Offline – Download XML file and open in Excel

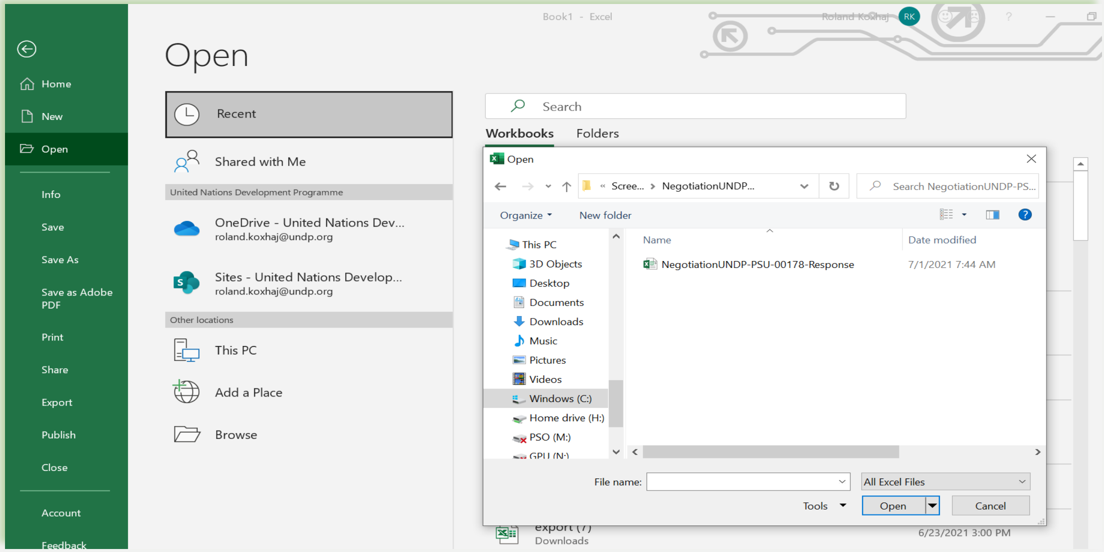
Select the options "Requirements and lines" and "Rich style spreadsheet" and click OK. The system will export and download the .XML file in a ZIP folder on your computer. Use an appropriate application to extract the file .XML file from the ZIP folder.



IMPORTANT

Please note that the system generates a new .XML file every time a negotiation is amended. Make sure you are using the latest .XML file when submitting your bid.

Open the saved .xml-file in **Excel** by going to the **“Excel”** application, clicking on **“Open”** □ **“Browse”** and then browsing the file location.



[Click to return to **Submit Bid** Main Page]

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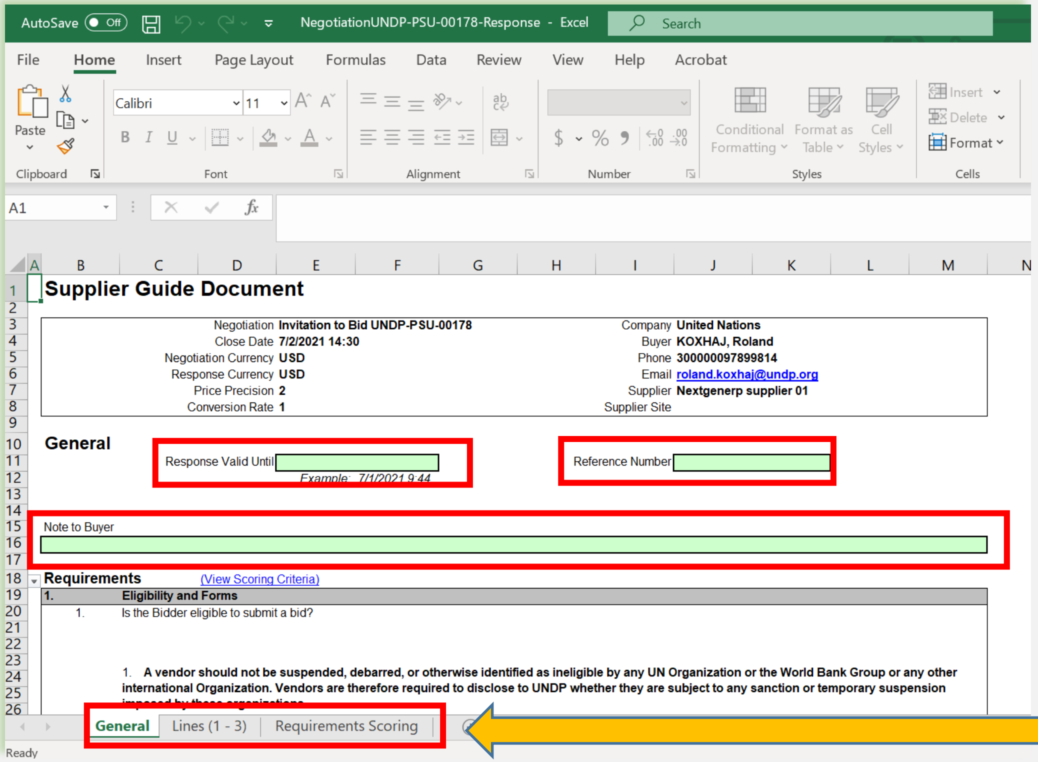
3.4 Prepare Bid Response Offline – Complete bid responses in Excel

Once you have opened the file in Excel, complete all the required info/data on each sheet tab of the .XML document.



IMPORTANT

Please make sure not to change any details of other cells than the ones in which you should enter the required answers and price offers.

IMPORTANT

Please check all the sheet tabs at the bottom of the excel file and make sure that you have answered all required fields.

Click to return to **Submit Bid** Main Page

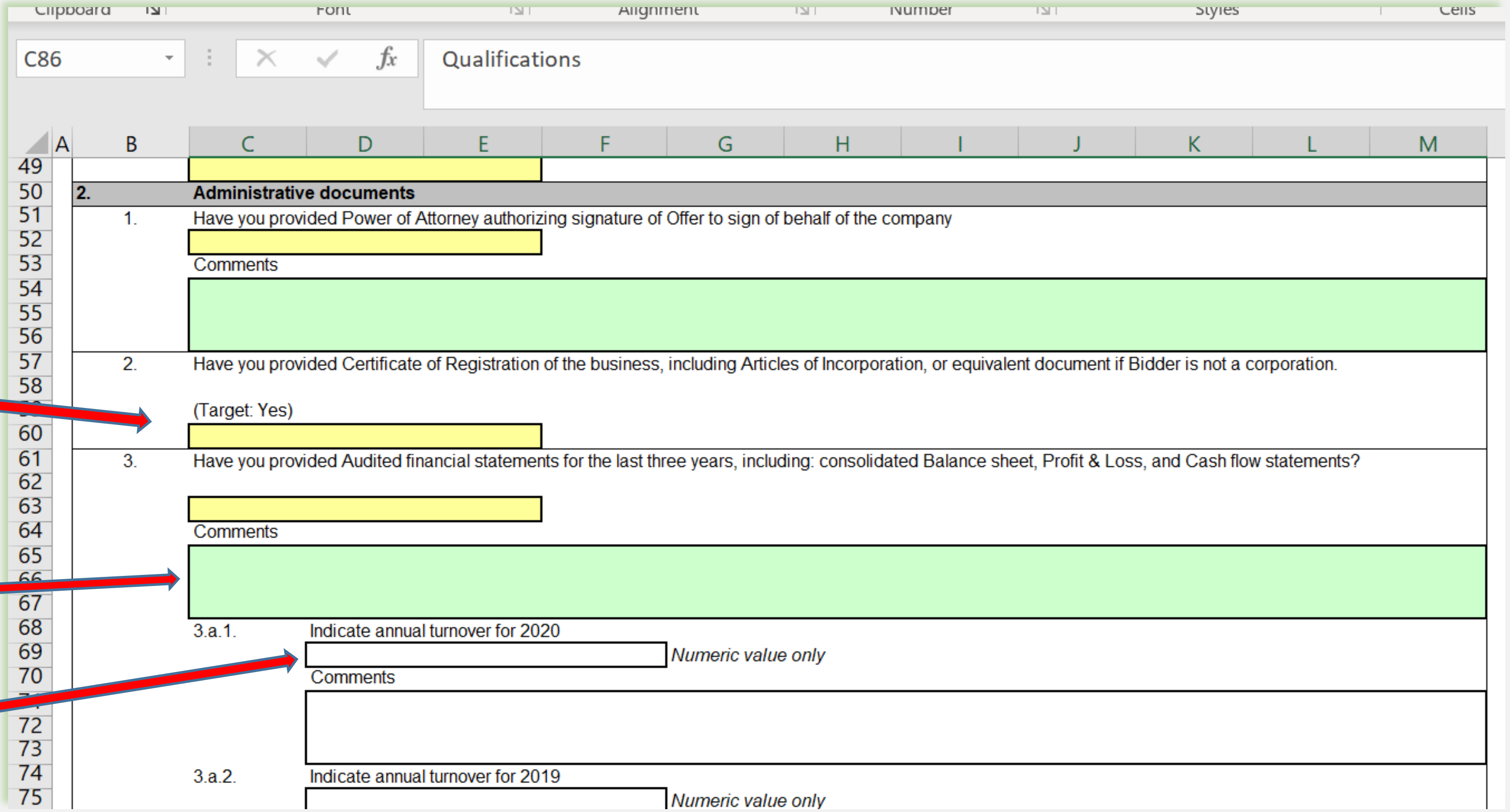
3.4 Prepare Bid Response Offline – Complete bid responses in Excel

Follow the instructions next to the cells that should be completed.

If the instruction says "**Target: Yes**" it means you can answer that question only with "Yes", thus type "**Yes**" in the answer cell.

In the "**Comments**" cells you can type any textual comment related to the answer that you provided in the answer cell.

If the instruction says "**Numeric value only**", type only a number in the answer cell.

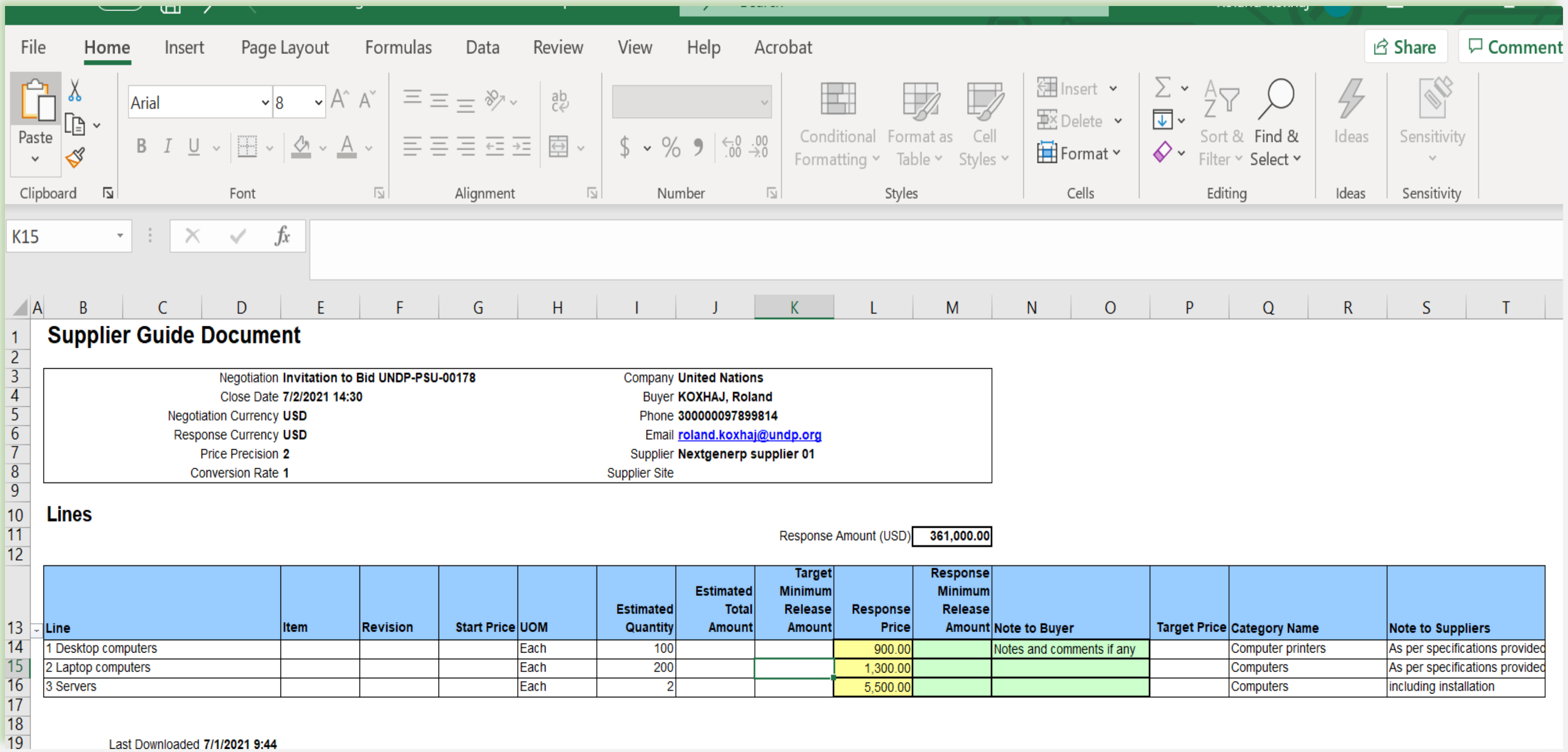


[Click to return to **Submit Bid** Main Page]

3.4 Prepare Bid Response Offline – Complete bid responses in Excel

Enter the price offer in the "**Response Price**" field for each line item that you wish to bid. If the negotiation requires bidding for all line items, enter the price offer in the "**Response Price**" filed for each line item listed.

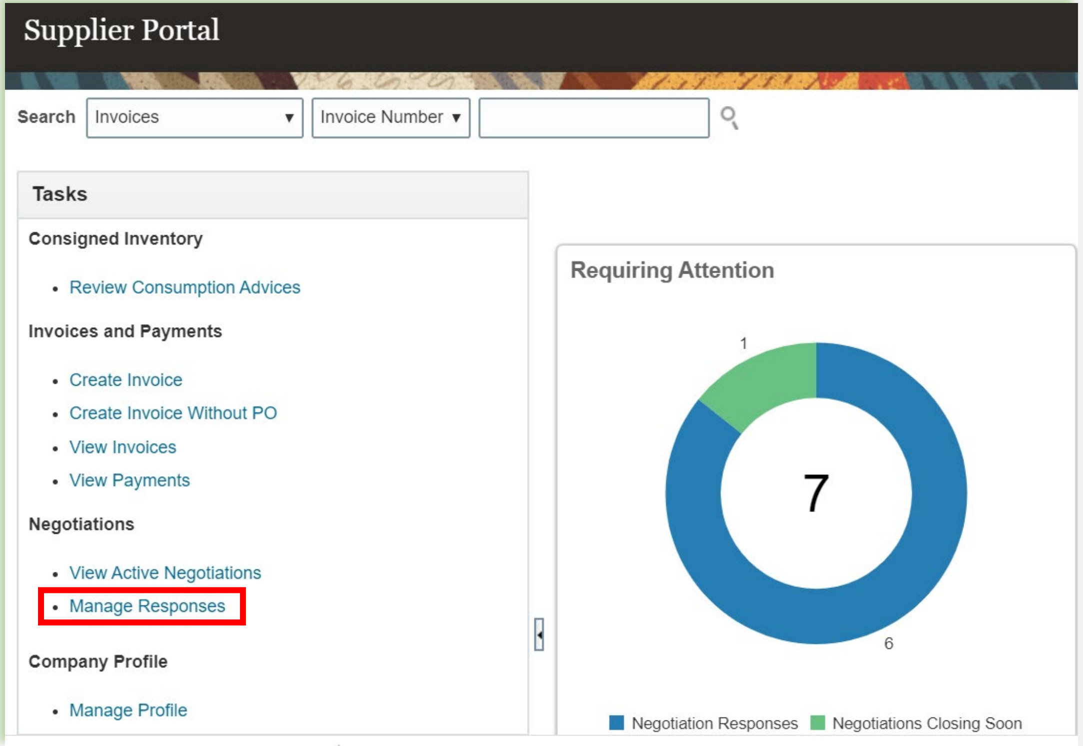
If you have any note/comments related to the line items, type them in the field "**Note to Buyer**" of the corresponding line item.



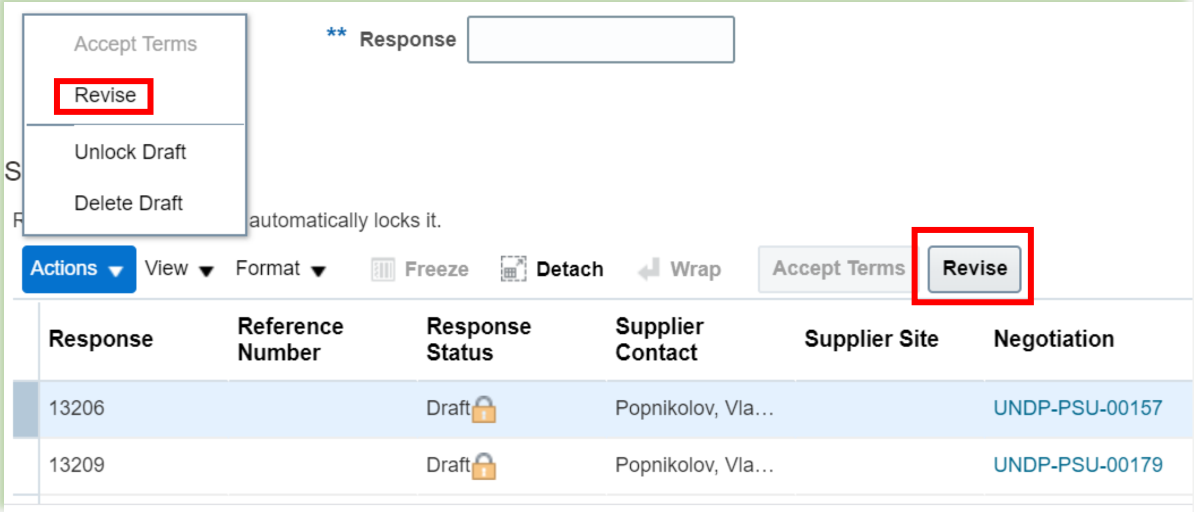
[Click to return to **Submit Bid** Main Page]

3.4 Prepare Bid Response Offline – Upload responses and submit

When you have completed all fields, save the document as an XML. Spreadsheet. Login to the system, click on the "Supplier Portal" icon and click the link ***"Manage Responses".***



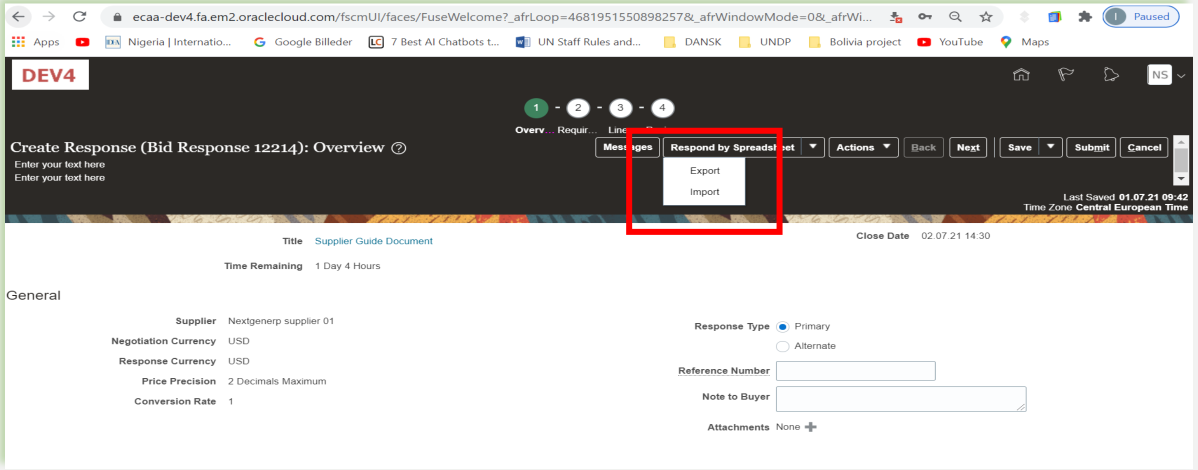
Select the draft response that you created for the negotiation in question and click the **"Revise"** button. You can also click the **"Action"** icon and select the **"Revise"** option. Your draft bid response will open.



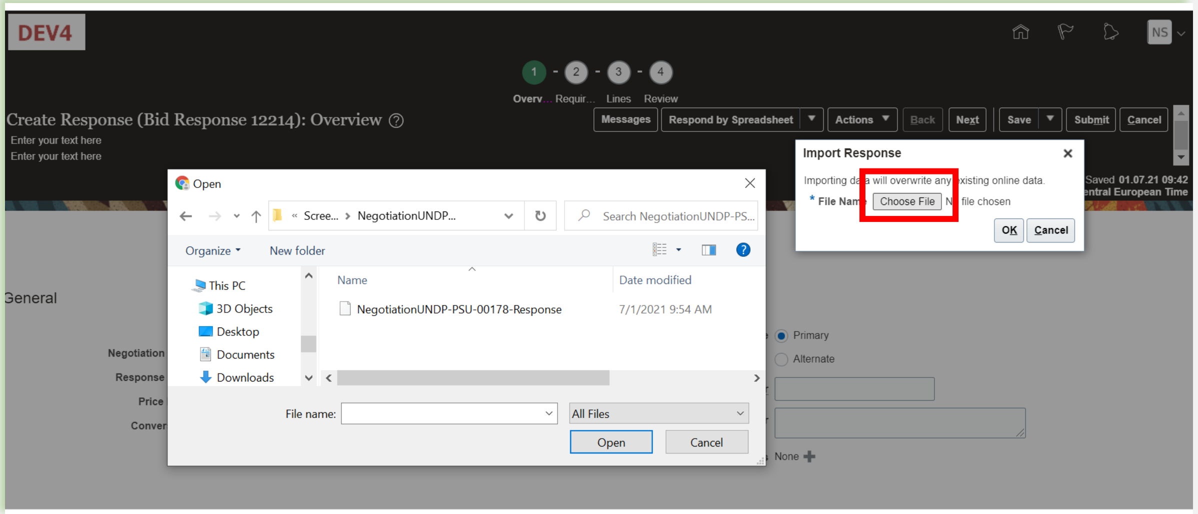
Click to return to **Submit Bid** Main Page

3.4 Prepare Bid Response Offline – Upload responses and submit

To upload the completed .XML file in the negotiation, click the button **"Respond by Spreadsheet"** and select the option **"Import"**.



Click on "Choose File" button and select the completed .XML file on your computer. Click **"OK"**. When the .xml-file is imported/uploaded, your answers will be automatically populated in each section of the Negotiation. Please review the answers to make sure everything is correct and add any attachments before validating your entries and submitting your Negotiation.

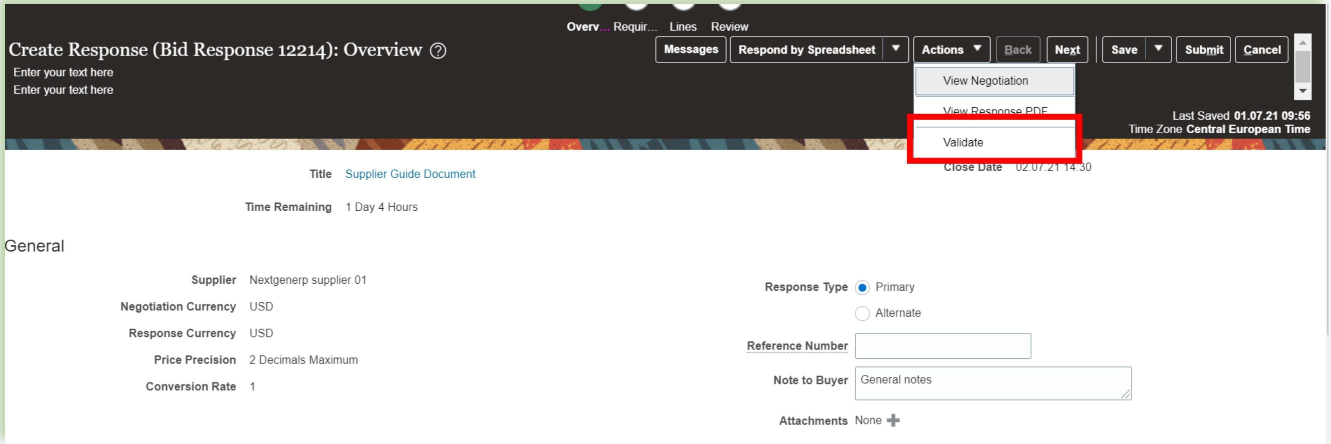


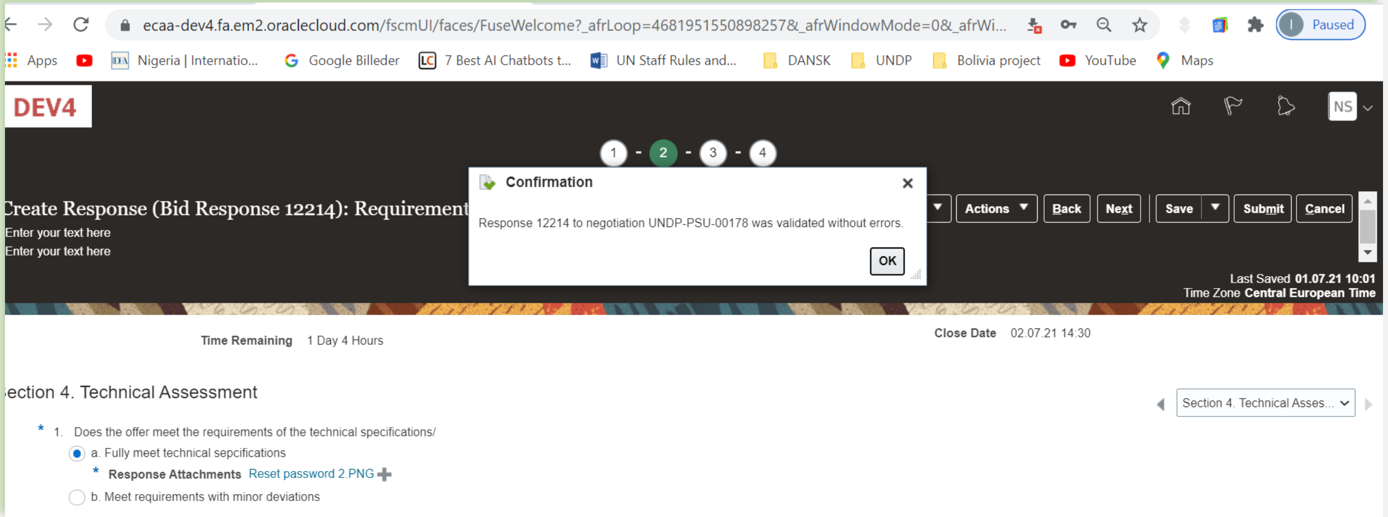
[Click to return to **Submit Bid** Main Page]

3.4 Prepare Bid Response Offline – Validate bid response and submit

You can validate the bid response prior to the submission. Click the "***Actions***" button and select the option Validate from the dropdown list.
The system will perform a validation of the bid response.
If no errors are identified,
you can proceed with the submission.

If the validation process identified an issue with the bid response (e.g., missing mandatory data), an error message will pop up and inform you what exactly is not correct on the bid response (e.g., which data is missing).

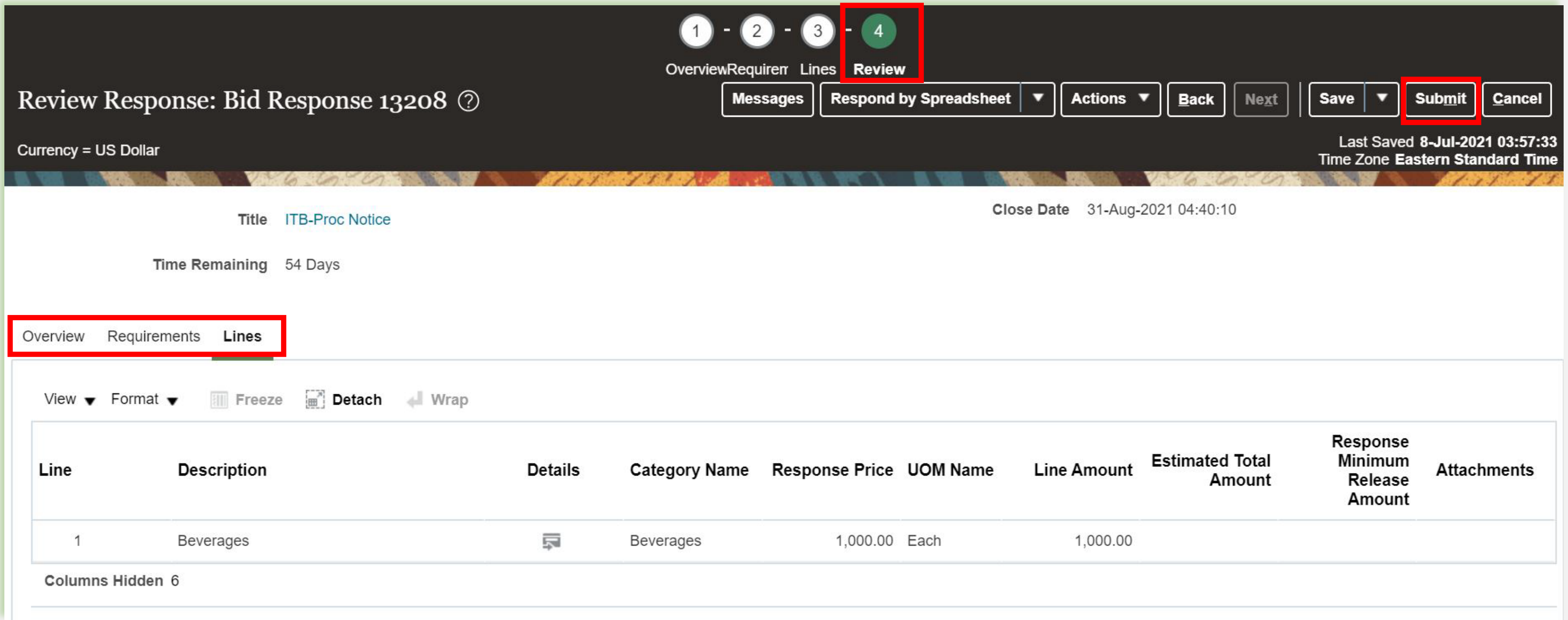




[Click to return to **Submit Bid** Main Page](#)

3.4 Prepare Bid Response Offline – Review bid response and submit

You can review your bid response by clicking ***"Review***". Then click on different Sections to view the entered info.   Once your bid is complete and your responses have been validated, click on “***Submit”*** to post it in the system.



Click to return to **Submit Bid** Main Page

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3.4 Prepare Bid Response Offline – Submit Bid Response

A confirmation message will pop up on your screen informing you that the bid response was submitted.

You will also receive an automatically generated e-mail notification confirming that the bid response was submitted.

From: noreply@undp.org <ecaa-dev4.fa.sender@workflow.mail.em2.cloud.oracle.com>
To: "tenders@xyzexpimp.com" <tenders@xyzexpimp.com>
Sent: Thursday, June 10, 2021, 03:46:32 PM GMT+2
Subject: Your bid for "UNDP-PSU-00156,1" has been received

Bid Confirmation

This is a confirmation of your bid placed on the Procurement Negotiation "UNDP-PSU-00156,1" listed below. If you edit/revise your posted bid and click on "Save", the system will save the new bid response as a draft, while the previous version will still be active. To submit the revised bid response, you must click on "Submit" button for the new version prior to the expiry of the negotiation end date/time.

If you wish to withdraw your posted bid and cancel your participation in this negotiation, please contact the procurement focal point managing this negotiation.

If an amendment is created by the Organization, the system will automatically remove your originally posted bid. In order to repost it, you must Acknowledge the amendment, review your bid response (if necessary) and Re-Submit the bid again. It is your full responsibility to ensure that your bid is successfully posted in the system prior to the expiry of the negotiation end date/time. Please refer to the detailed instructions in the user guide.

Esta es una confirmación de su oferta realizada en la Negociación de Adquisiciones "UNDP-PSU-00156,1", enumerada más abajo. Si edita o revisa su oferta ya publicada y hace clic en "Guardar", el sistema guardará la nueva oferta como borrador, si bien la versión anterior seguirá activa. Para enviar la oferta revisada, debe hacer clic en el botón "Enviar" en la nueva versión antes de que expire el plazo establecido para el envío de ofertas.

Si desea retirar su oferta ya publicada y cancelar su participación en esta Negociación, por favor póngase en contacto con la persona de contacto establecida en la Negociación.

Si la Organización crea una enmienda, el sistema eliminará automáticamente su oferta inicial. Para volver a enviarla, deberá reconocer la enmienda, revisar su oferta (si es necesario) y volver a enviarla. Es su responsabilidad asegurarse de que su oferta se ha enviado correctamente a través del sistema antes de que finalice el plazo establecido para el envío de ofertas para esta Negociación. Puede acceder a instrucciones detalladas en la guía de usuario.

Ceci est une confirmation de votre offre placée sur le dossier d'appels d'offres « UNDP-PSU-00156,1 » référencé ci-dessous. Si vous modifiez/révisez votre offre publiée et cliquez sur « Enregistrer », le système enregistrera la nouvelle offre sous forme de brouillon, tandis que la version précédente sera toujours active. Pour soumettre l'offre révisée, vous devez cliquer sur le bouton « Soumettre » pour la nouvelle version avant l'expiration de la date/heure limite de soumission.

Si vous souhaitez retirer votre offre soumise et annuler votre participation à cette négociation, veuillez contacter le point focal d'approvisionnement qui gère cet appel d'offres.

Si une modification est créée par l'Organisation, le système supprimera automatiquement votre offre initialement soumise. Pour le reprendre, vous devez prendre connaissance de la modification, examiner votre réponse à l'offre (si nécessaire) et soumettre à nouveau l'offre. Il est de votre responsabilité totale de vous assurer que votre offre est affichée avec succès dans le système avant l'expiration de la date ou de l'heure limite de soumission. Veuillez consulter les instructions détaillées du guide de l'utilisateur

Supplier Name	Supplier Contact	BU Name	Negotiation Type	Negotiation Number	Response Number	Response Submission Date & Time	Time zone	Bid Response Withdrawn?
XYZ Export-Import	User One	UNDP-PSU	Invitation to Bid	UNDP-PSU-00156,1	8206	6/10/2021 9:42 AM	0:00	NA

Click to return to **Submit Bid** Main Page

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4. Manage Bids

Click to return to TOC

This section guides the Supplier on how to view, edit, cancel a bid that is already saved in the system or submitted. The section also explains how Suppliers can resubmit a bid when a negotiation is modified.

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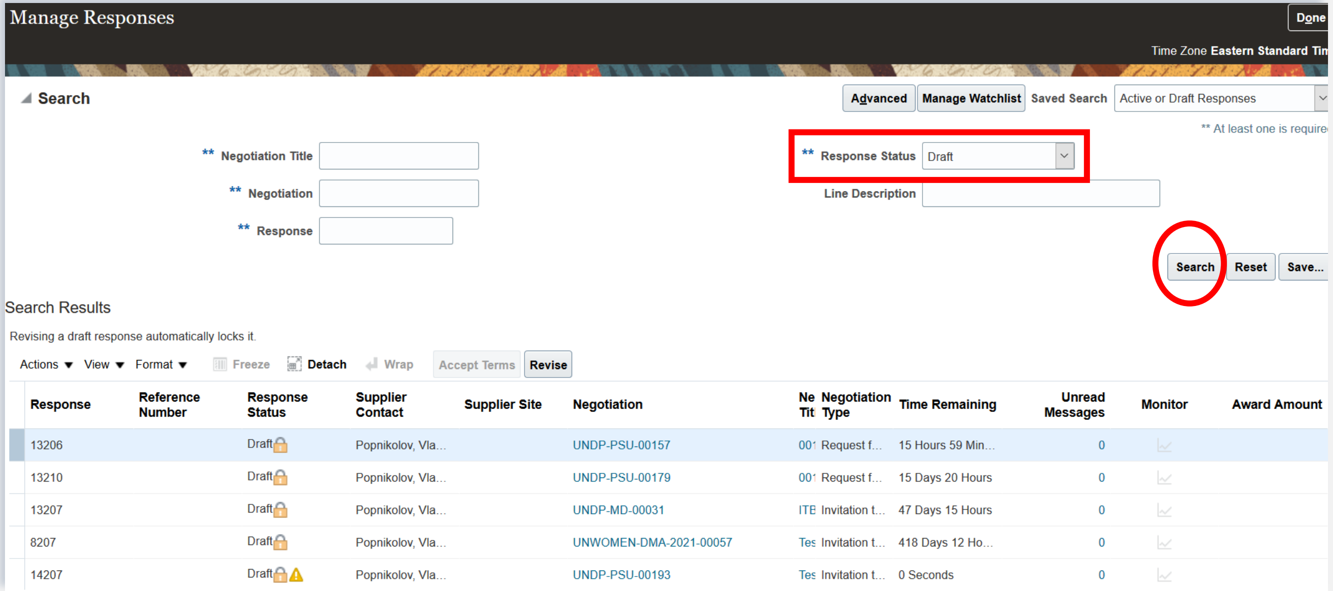
QUANTUM

4.1 Manage Bids – View Bid Response(s)

To view your bid responses for the negotiations that you participated, login to your Supplier profile and go to *"**Supplier Portal**"*. Click on "***Manage Bid Responses*".**

You can use different Search criteria. If you know the ID of the negotiation, enter it in the **"Negotiation"** field and click the *"**Search**"* button. Your bid response for that negotiation will be displayed in the Search Results.

You can also search your bid responses by selecting one of the values in the dropdown list for the **"Response Status"**:



Click the button ***"Search"*** and all bid responses with that status will be listed.

Active – to see bid responses submitted for ongoing negotiations;

Active or draft – to see both the submitted and draft responses for ongoing negotiations;

Awarded – to see your awarded bid responses;

Disqualified – to see your bid responses which were disqualified during the evaluation process;

Draft – to see the bid responses which were saved as draft (not submitted);

Pending Award – to see your bid responses which are awaiting an award decision;

Rejected – to see your bid responses that were not awarded;

Resubmission required – to see your bid responses which have to be resubmitted because the negotiations were amended.

[Click to return to **Manage Bid** Main page]

U N D P
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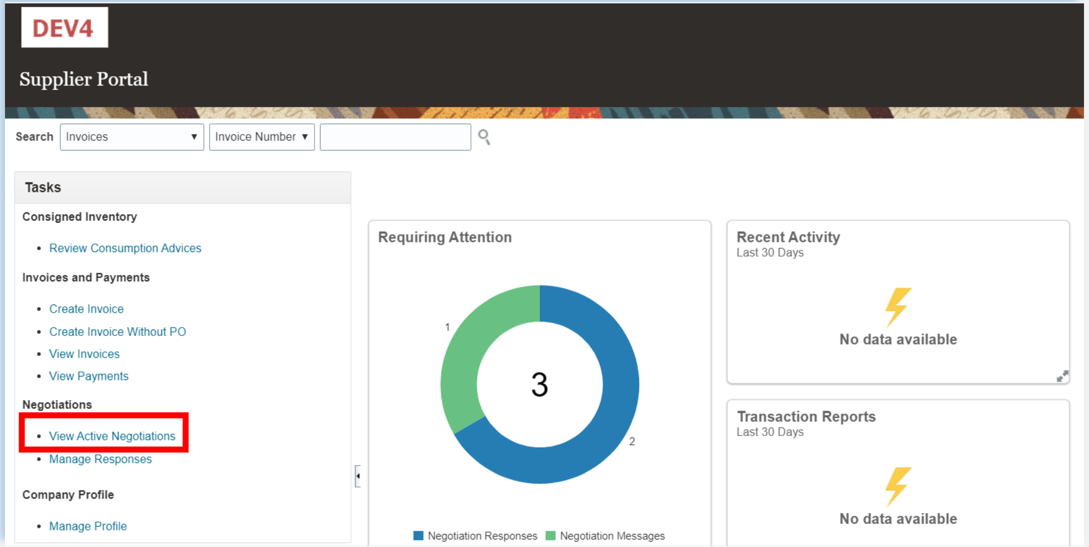
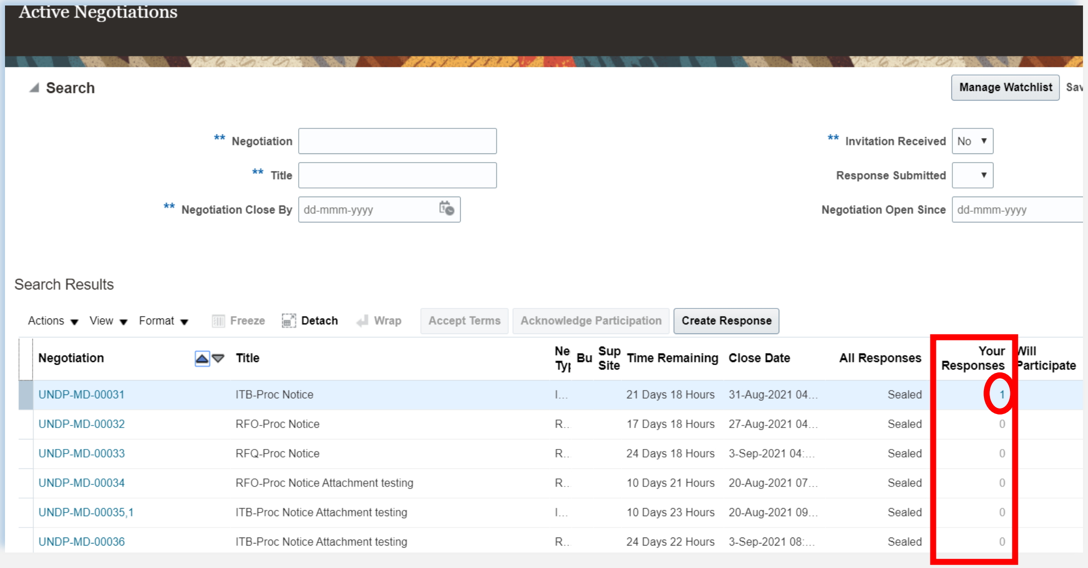
4.1 Manage Bids – View Bid Response(s) for ongoing negotiations

To view your bid response(s) for the on-going (Active) negotiations, login to the system, click on the "***Supplier Portal***" icon and then "***View Active Negotiations***" link. All on-going negotiations will be listed.

The negotiations for which you have not created a bid response will have value **0** in the column ***Your Responses.***

The negotiations for which you created a draft or submitted a bid response will have the value **1** in the column ***Your Responses.*** To open the bid response, click the number **1.**

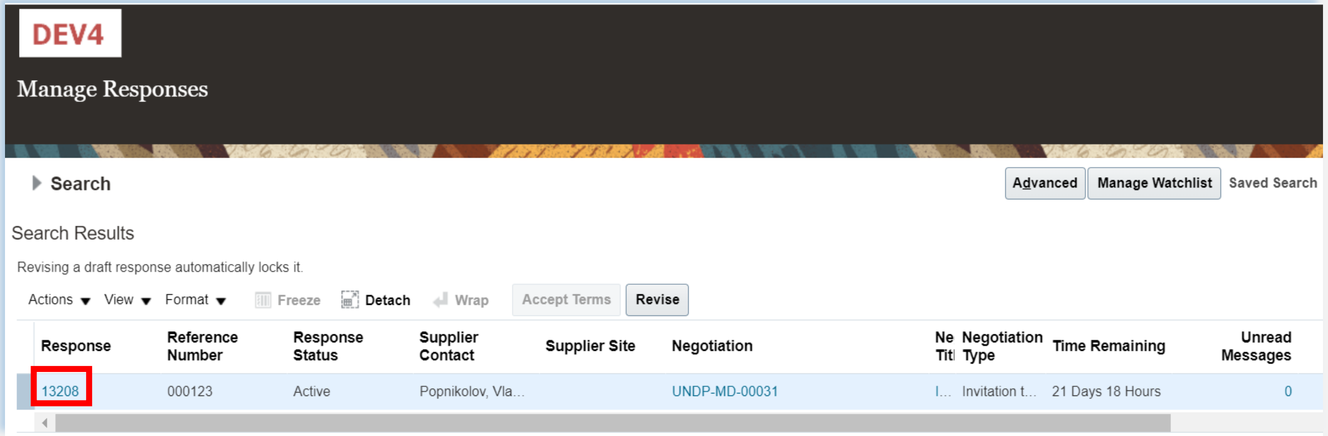




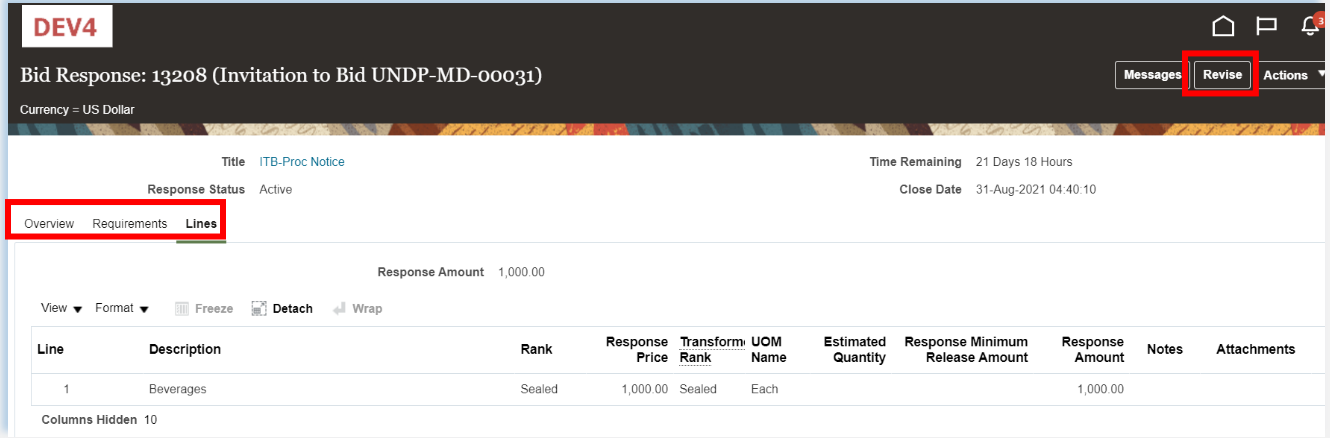
Click to return to **Manage Bid** Main page

4.2 Manage Bids – View and Edit/Revise your Bid Responses

In the column ***“Response Status”*** you will see the status of your bid. For a bid to be successfully submitted, the status must show as ***“Active”.*** Then, click on the number displayed in the column ***“Response”*** and the system will open your submitted bid.



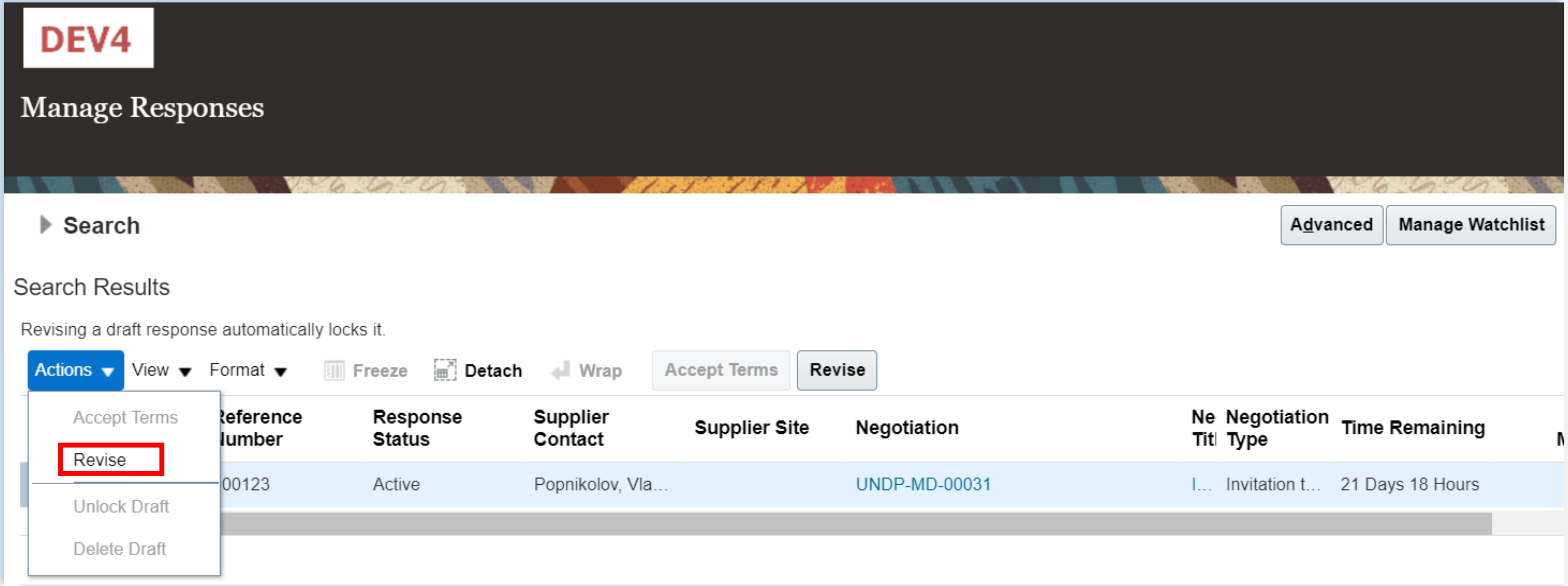
Click on different ***Sections*** to view the entered info. To revise the bid response, click the “***Revise”*** button. The bid response will be open for editing.



[Click to return to **Manage Bid** Main page]

4.2 Manage Bids – View and Edit/Revise Your Bid Response (2)

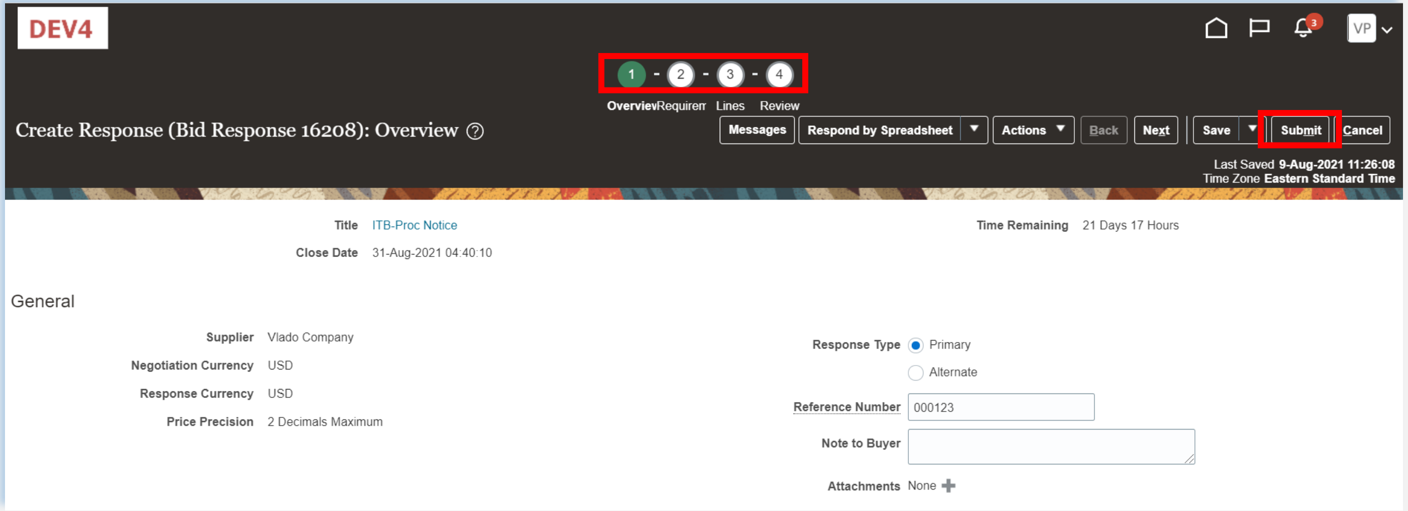
You can also edit a bid response by clicking on “***Actions”*** and then “***Revise”***.



[Click to return to **Manage Bid** Main page]

4.2 Manage Bids – View and Edit/Revise Your Bid Responses (3)

To view and edit the data entered in different sections of your bid response (Overview, Requirements or Lines), click on the appropriate step of the response. Once you implemented the changes, click the "***Submit"*** button to post your revised bid response.



IMPORTANT

Make sure that you submit your bid after you edit/revise it.

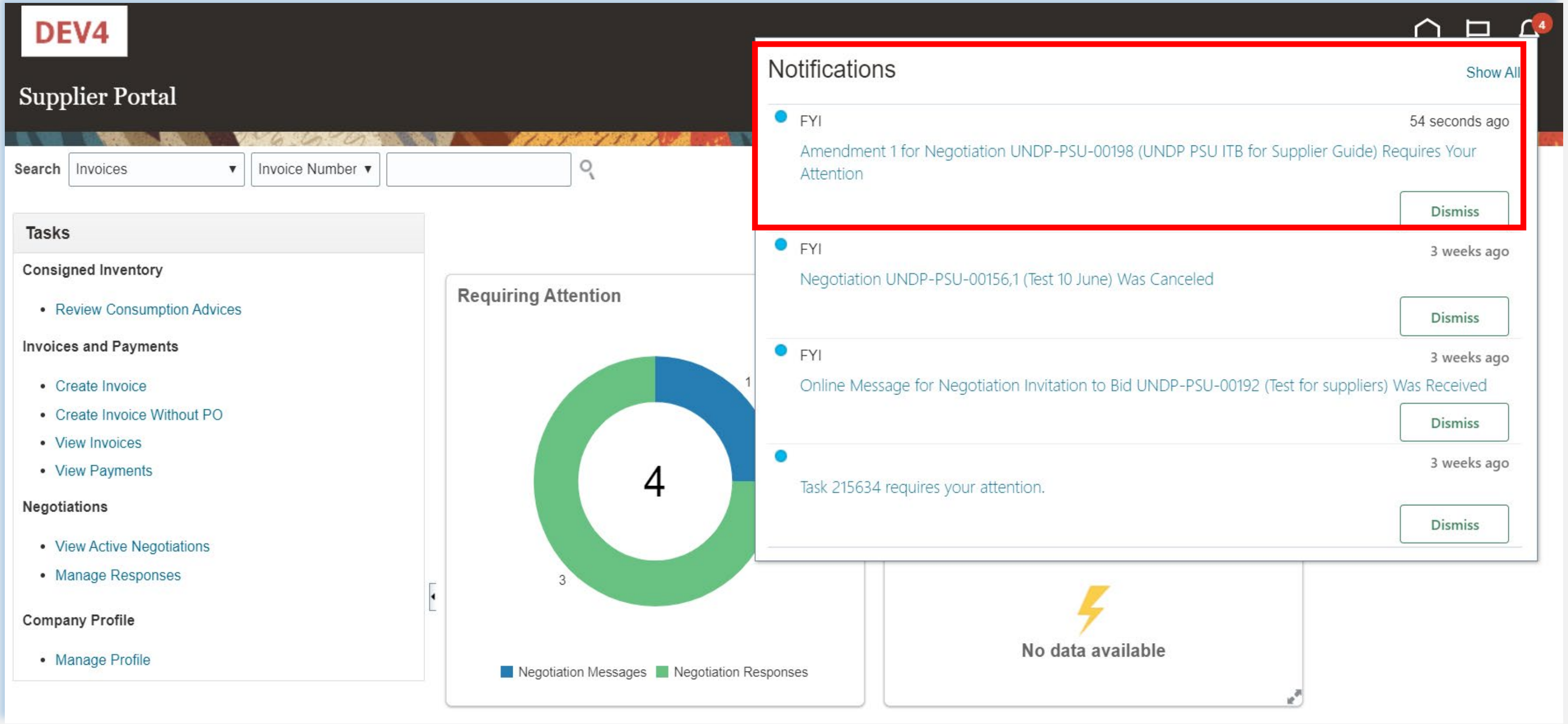
Click to return to **Manage Bid** Main page

4.3 Manage Bids – Manage a bid after negotiation is amended

If the negotiation for which you submitted a bid response is amended, your bid response will not be valid anymore and its status will change for ***Active*** to ***Resubmission Required***. You will receive a notification e-mail generated by the system with this information. You can also find a notification in your Supplier profile once you login to the system.

IMPORTANT

Please note that whenever a negotiation is amended, bids posted prior to the amendment are automatically withdrawn and must be resubmitted.

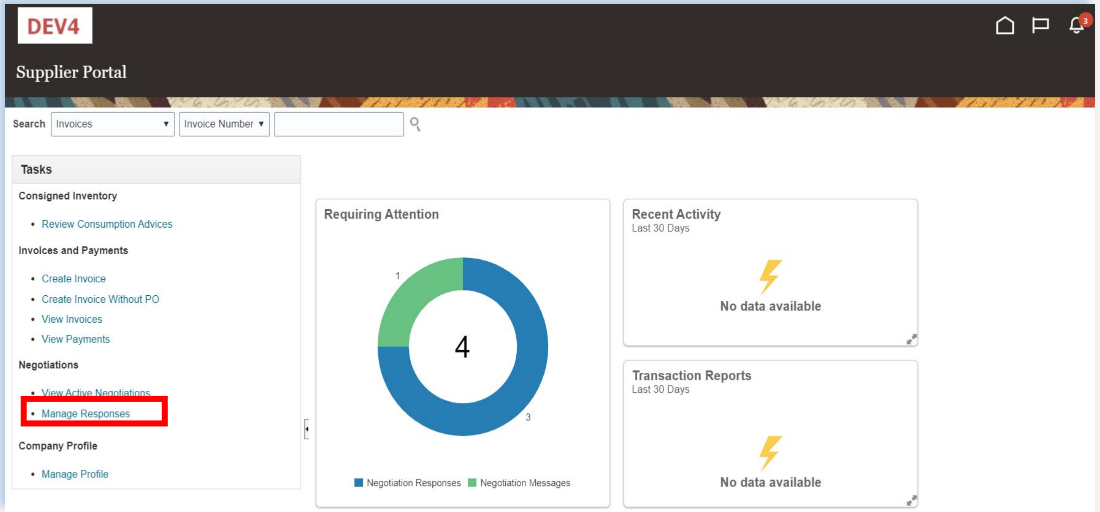


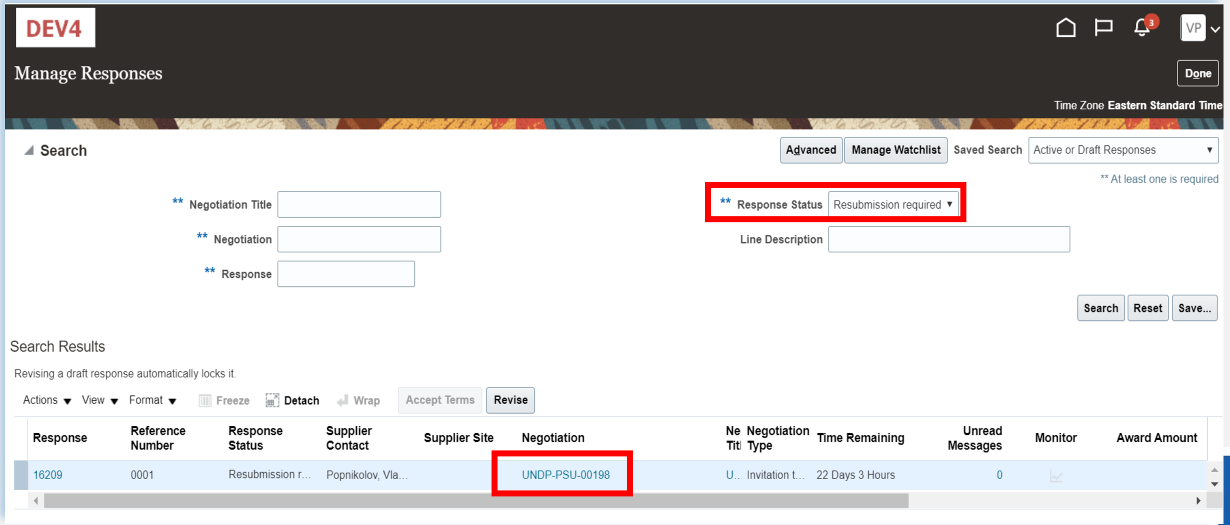
Click to return to **Manage Bid** Main page

4.3 Manage Bids – Manage a bid after negotiation is amended

You have to acknowledge the amendment first and then you will be able to resubmit your bid response.
Click on the "***Supplier Portal"*** icon and then click on "***Manage Reponses".***

In the Search Criteria, select the option ***Resubmission required*** in the field ***Response Status.*** Your bid responses that have to be resubmitted for amended negotiations will be listed in the ***Search Results***. Click the negotiation for which you wish to acknowledge the amendment and resubmit your bid response.

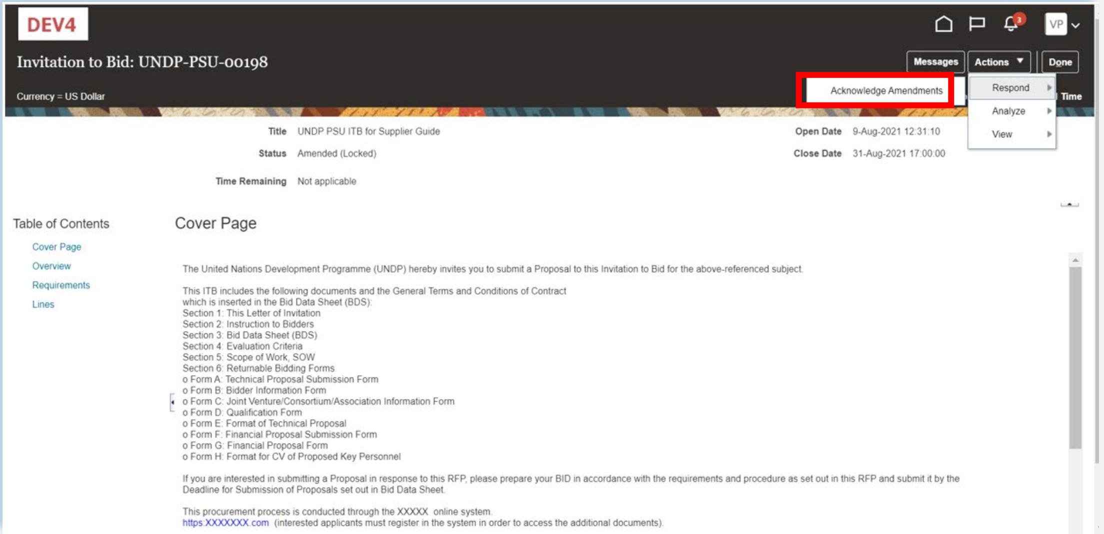




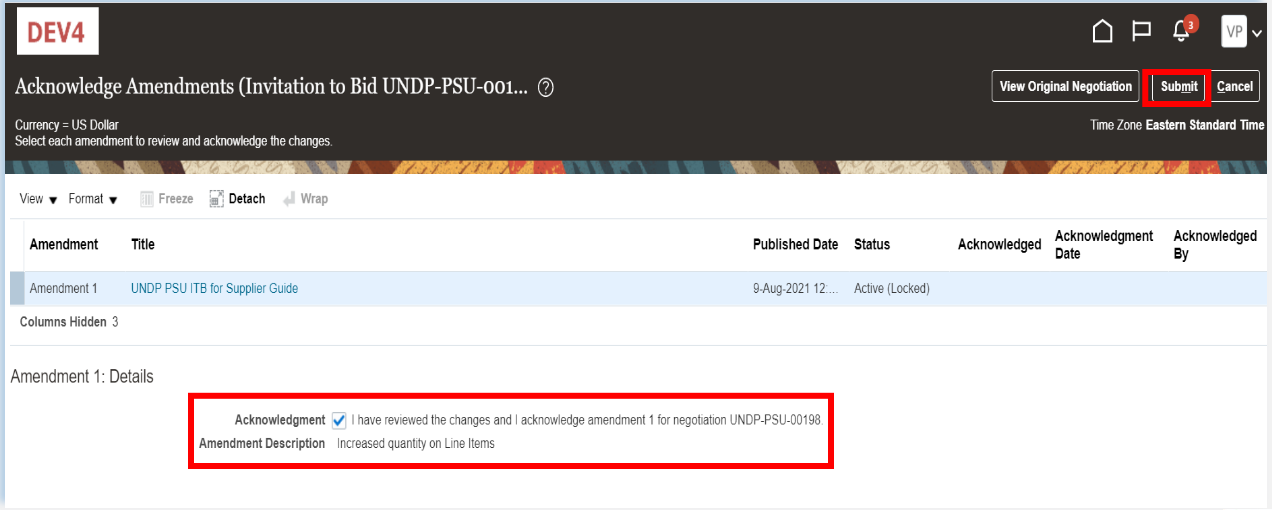
Click to return to **Manage Bid** Main page

4.3 Manage Bids – Manage a bid after negotiation is amended

The amended negotiation will open. Click the button "***Actions***", then select the option "***Respond***" and click on "***Acknowledge Amendments***".



A short description of the changes in the amended negotiation will be displayed in the ***Amendment Description*** part. Scroll up and down to see more details of the amended negotiation.
To acknowledge the amendment, check the box in front of the text "I have reviewed the changes and I acknowledge amendment 1 for negotiation XXXXX" and click the button "***Submit***".



Click to return to **Manage Bid** Main page

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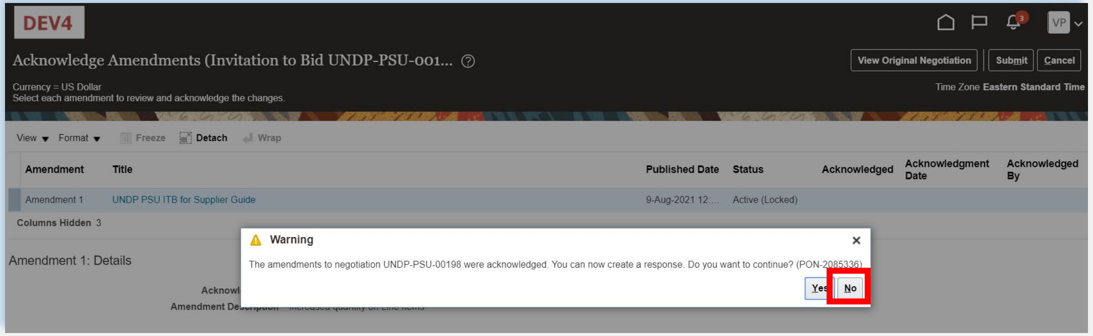
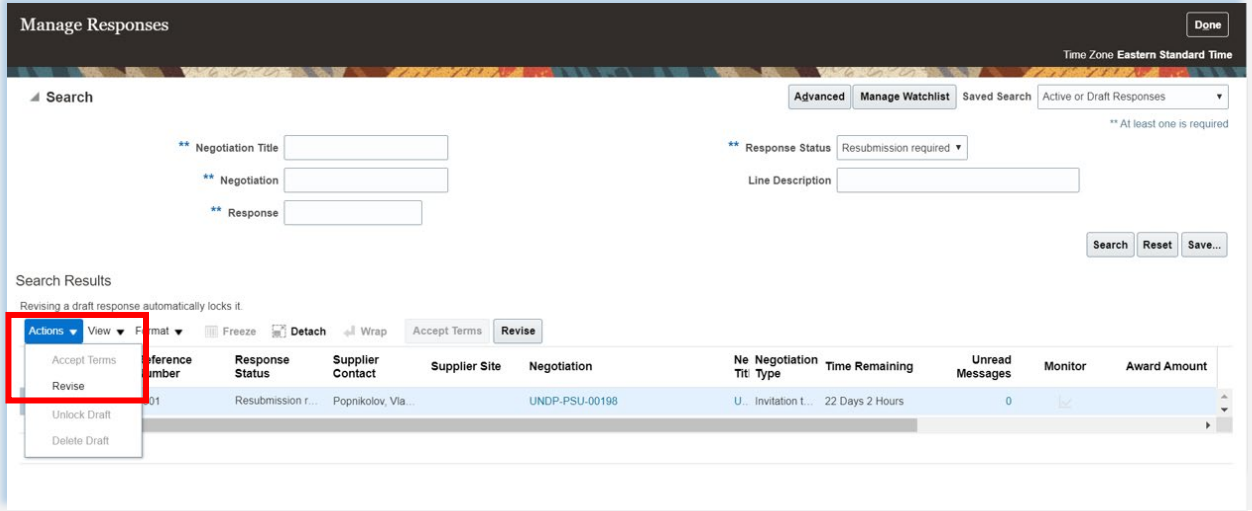
4.3 Manage Bids – Manage a bid after negotiation is amended

A warning message informing you that you acknowledged the amended version of the negotiation and new bid response will be created will popup. Select the option "***No"***, as you are not going to create new bid response but revise the existing one.

Click the option "***Actions"*** and select the option Revise.



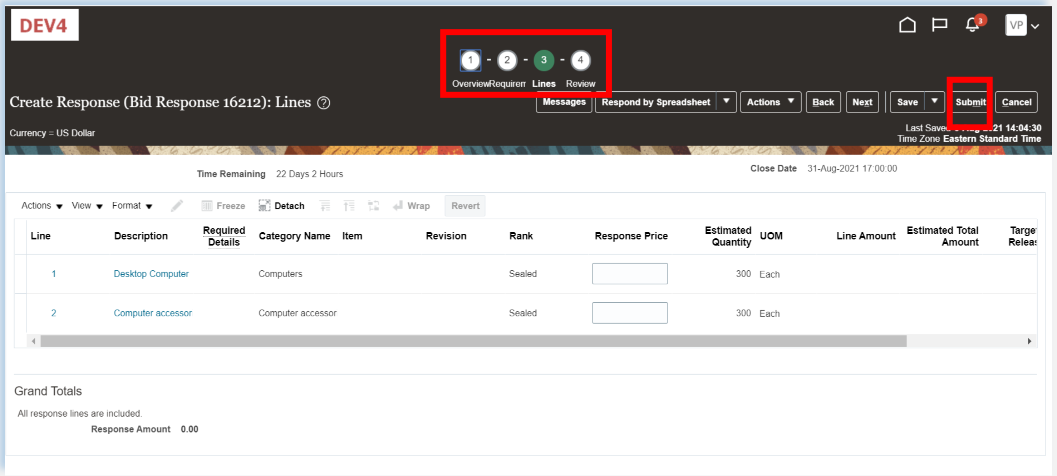


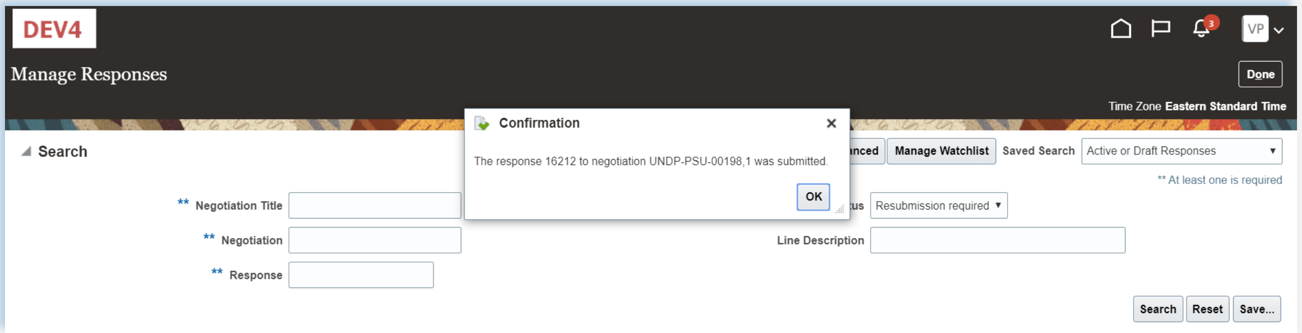
[Click to return to **Manage Bid** Main page]

4.3 Manage Bids – Manage a bid after negotiation is amended

All answers submitted in the bid response for the previous version of the negotiation will be displayed and all the fields will be open for editing. Click on each section of the bid response and you will be able to edit the info/data.
Once your revised bid response is complete, click the *“**Submit**”* button.

A confirmation message that your bid response is submitted will be displayed on your screen.





Click to return to **Manage Bid** Main page

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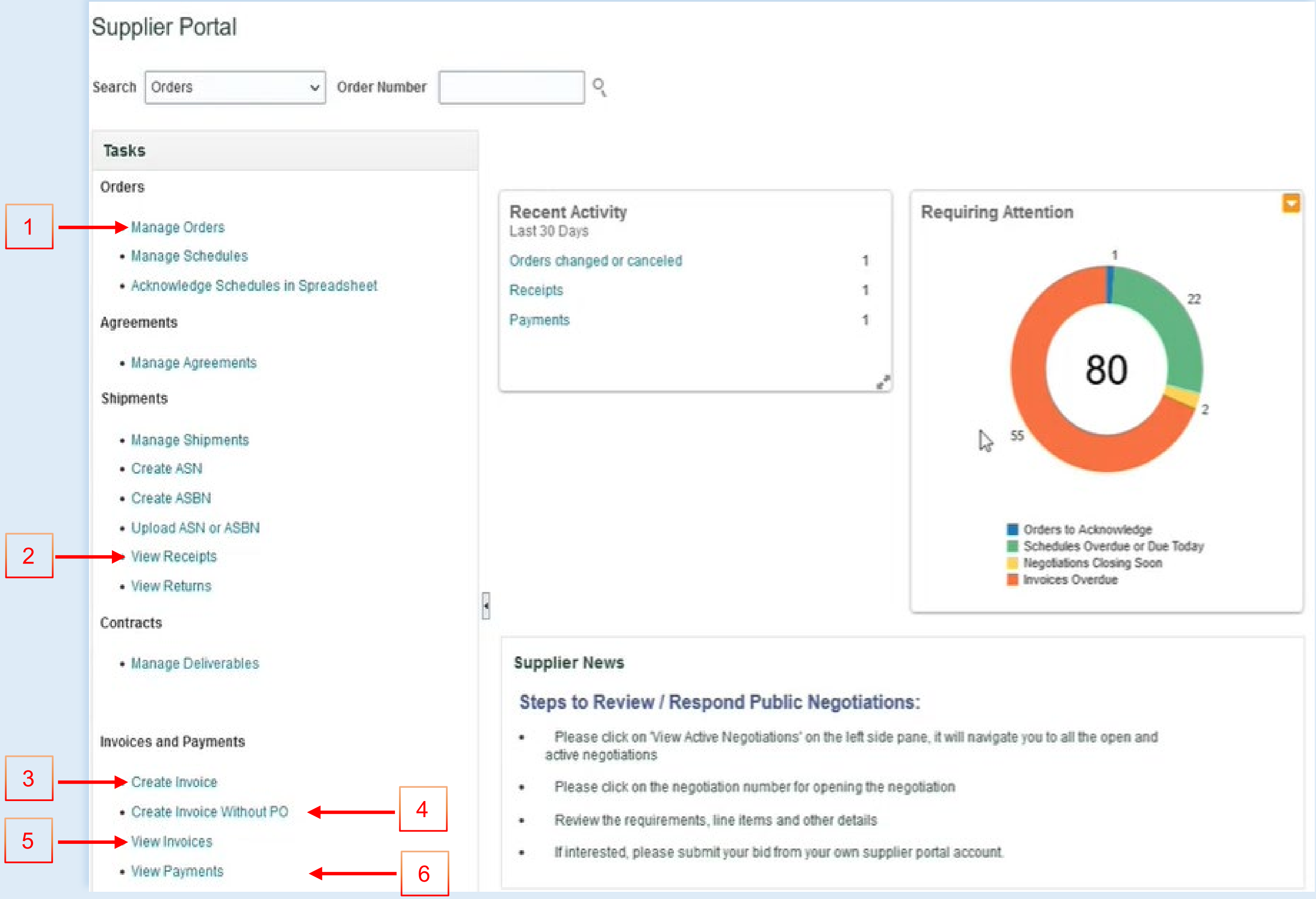
4.4 Withdraw your bid response

For instructions on how to withdraw your submitted bid response, please contact the procurement focal point managing the tender/negotiation.

Click to return to **Manage Bid** Main page

5. Manage Orders and Invoices



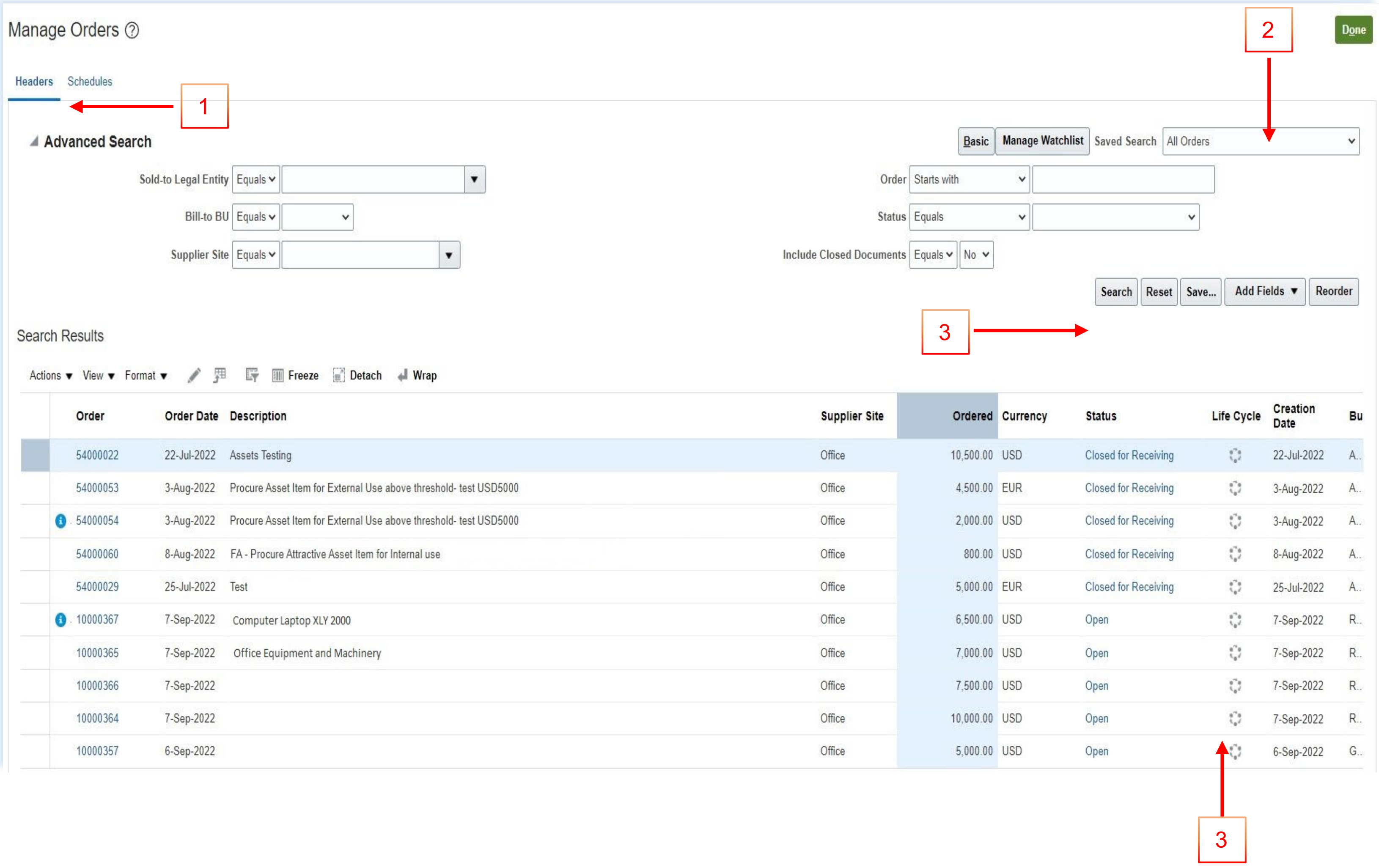
This Chapter is applicable only for “Spend Authorized” suppliers who have active contracts with UNDP. It provides an overview on how to Create Invoice(s), view Purchase Orders, Invoices, Payments and Remittances in the supplier portal. These options are found under the **Task**s segment of the Supplier Portal page.

1. Manage Order
2. View Receipts
3. Create Invoice
4. Create Invoice without PO
5. View Invoices
6. View Payments

5.1 Manage Orders

Navigate the Tasks on the Supplier Portal page in the previous slide and follow the steps below :

1. Click ***"Manage Orders"*** Headers/Schedules
2. Enter the purchase order in the ***"Order"*** field or chose ***"All Orders"***.
3. Click ***"Search"***: The purchase order(s) details are listed in the such as Order Number, Order Date, Description, Amounts, Currency, Buyer , PO Status and Schedules.
4. Click ***"Life Cycle"*** for PO dashboard
5. Click on "***PO number***" to preview the PO



Tip

Status

- **On Hold:** The Order is on hold; no transactions can be created.
- **Closed for Receiving:** The Order is fully received
- **Closed for Invoicing**: The Order is fully invoiced
- **Open:** The Order is Open for receiving and Invoicing
- **Cancelled:** The Order is cancelled but not deleted
- **Pending Change Approval**: The Order has a change request that is sent for approval

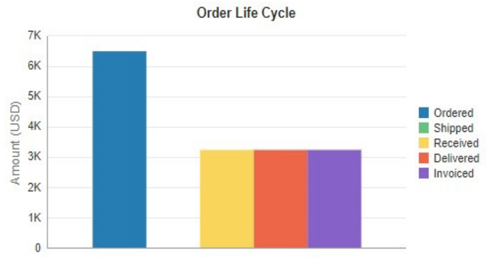
Click to return to Manage Orders and Invoices Main Page

5.1 Manage Orders – Life Cycle

Order Life Cycle: 10000367

Done

Sold-to Legal Entity	United Nations Development Programme
Order	10000367
Supplier	XYZ Company Test
Supplier Site	Office
Supplier Contact	
Ordered	6,500.00 USD



Ordered	6,500.00 USD
Shipped	0.00 USD
Received	3,250.00 USD
Delivered	3,250.00 USD
Invoiced	3,250.00 USD

In-Transit Shipments

Actions View Format Freeze Detach Wrap

Shipment	Ship Date	Tracking Number	Packing Slip	Expected Receipt Date	Shipped	Carrier	Bill of Lading

No results found.

Columns Hidden 2

Receipts

Actions View Format Freeze Detach Wrap

Receipt	Receipt Date	Shipment	Ship Date	Packing Slip	Returned	Received	Delivered	Invoiced	Open to Invoice
98	8-Sep-2022 0...				0.00	3,250.00	3,250.00	0.00	0.00

Columns Hidden 3

Invoices

Actions View Format Freeze Detach Wrap

Invoice	Invoice Date	Status	Invoice Total	Paid	Matched Amount	Receipt	Packing Slip
INV-2022-1789	8-Sep-2022	Validated	3,445.00	0.00	3,250.00		

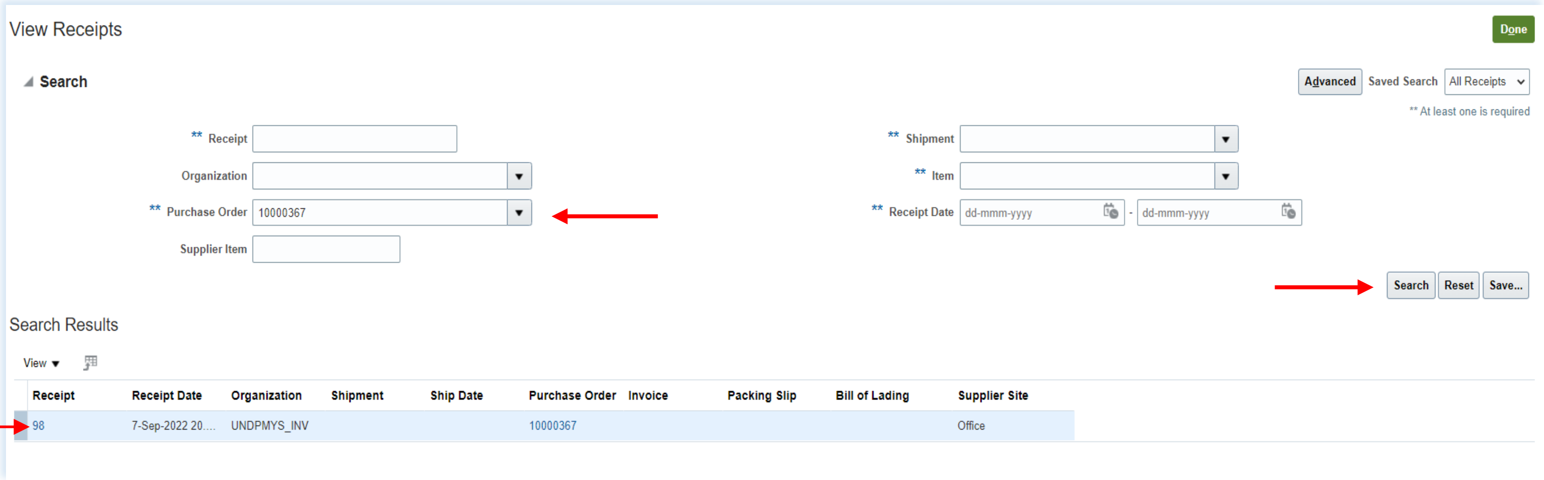
Columns Hidden 3

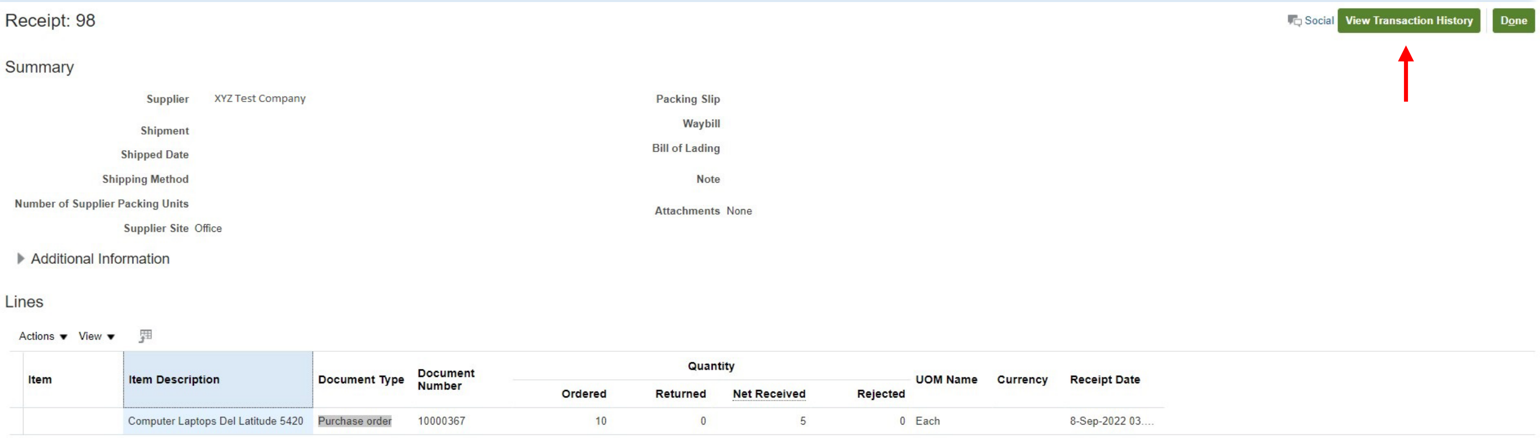
Order **Life Cycle** details:

- Order Number
- Supplier Name
- Supplier Site
- Supplier Contact
- Ordered Amount
- Shipped Amounts
- Received Amount
- Invoiced Amount
- Receipts Details
- Invoices Details
- In-Transit Shipments
- Bar-Chart for PO transactions

Click to return to Manage Orders and Invoices Main Page

5.2 View Receipts



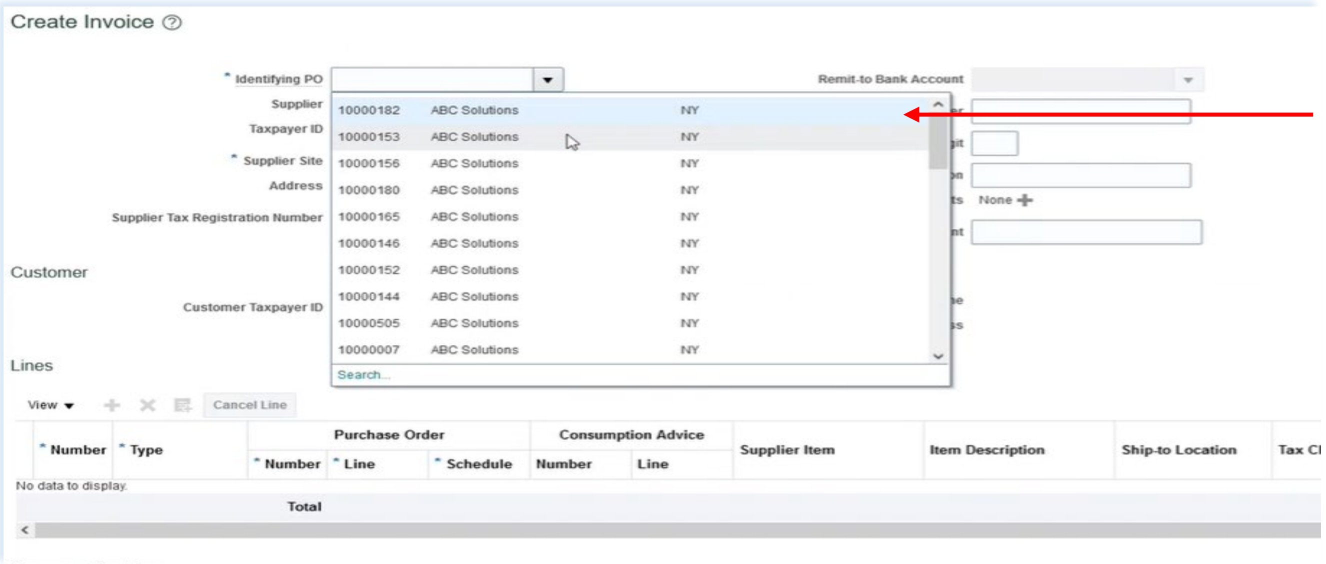


Navigate the Tasks on the Supplier Portal page and follow the steps below:

1. Click ***"View Receipts"***
2. Chose **All Orders** saved search
3. Enter/Select one or more of the following parameters: Receipt Number, Purchase Order Number, Shipment, Item or Receipt Date range .
4. Click **"Search".**
5. Select **Receipt** form the table.
6. Click on the "***Receipt"*** number to view the receipt's details (Header and Lines)
7. **Click "View Transaction History"**

Click to return to **Manage Orders** and **Invoices** Main Page

5.3 Create Invoice



Step 1

Click *"**Create Invoice**"* option from the main Supplier Portal page

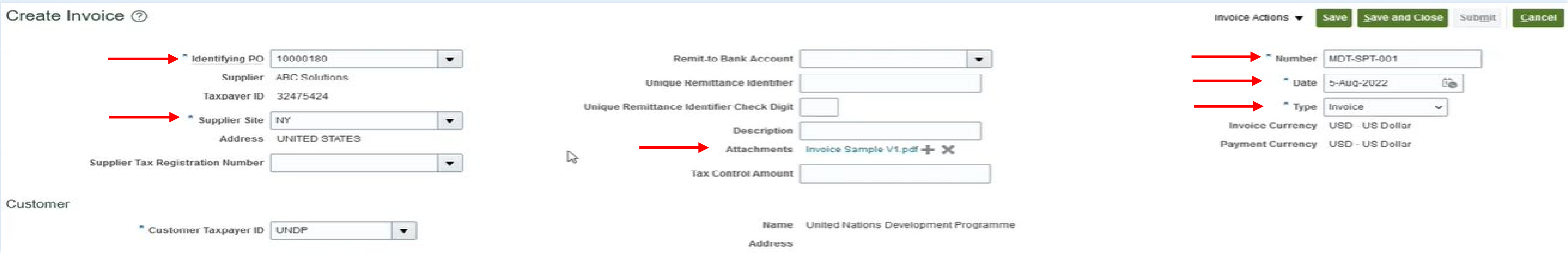
Step 2

Enter Purchase Order Number/Select from the dropdown list.

Step 3

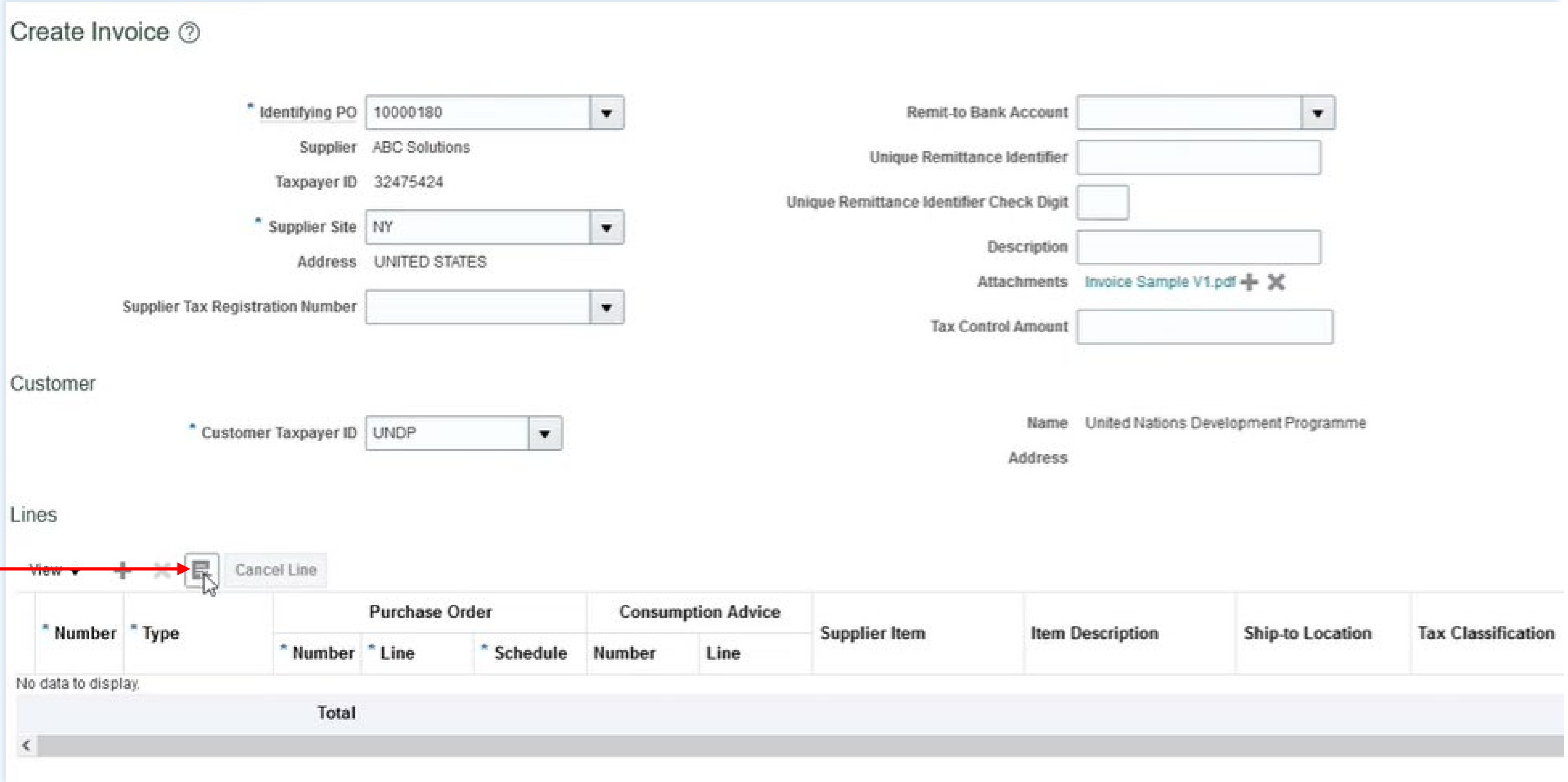
Add the Invoice header, including all the mandatory fields below:

- Identifying PO
- Invoice Number
- Invoice Date
- Invoice Type
- Supplier Site
- Attachments



[Click to return to Manage Orders and Invoices Main Page]

5.3 Create Invoice

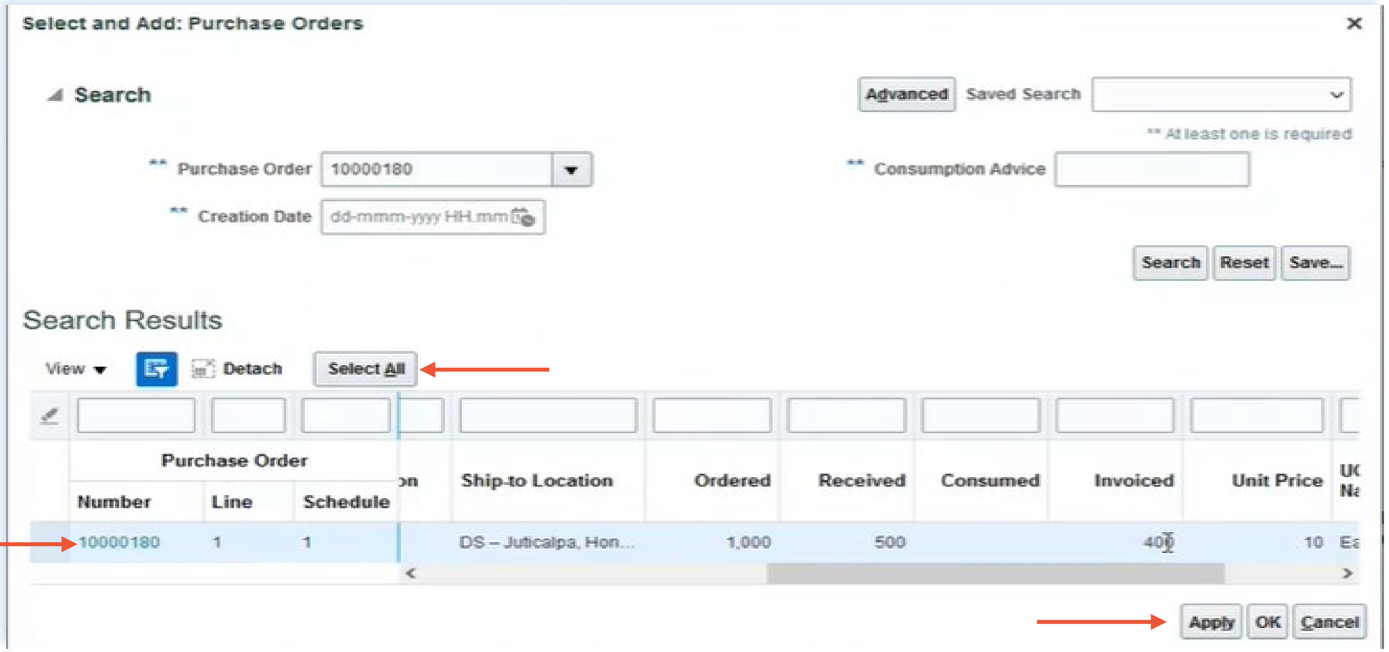


Step 4

Go to the ***"Select and Add"*** to view the lines pending to be invoiced

Click to return to **Manage Orders** and **Invoices** Main Page

5.3 Create Invoice



Step 5

- Select Purchase Order line(s)
- To select all purchase order lines use *"**Select All**"* button
- Click "***Apply***" + "***OK***"

Step 6

- Scroll right to view the other columns

  Example:

  ✓ Ordered Qty = 1000 Units

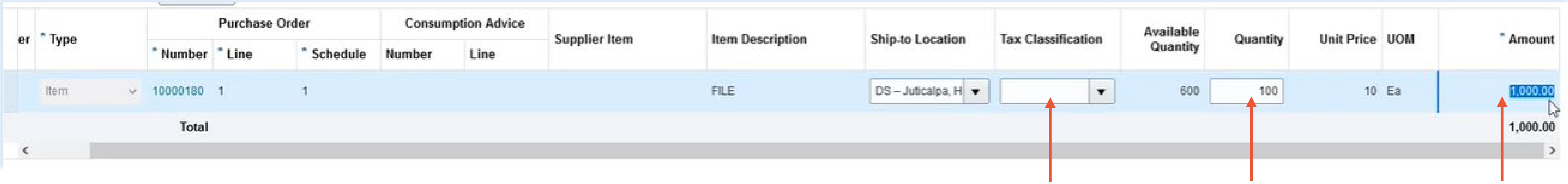
  ✓ Received Qty = 500 Units

  ✓ Invoiced Qty = 400 Units

  ✓ Qty to be Invoiced = 100 Units
- Enter the Invoice Quantity / Amount
- Select Tax Classifications, if Any.

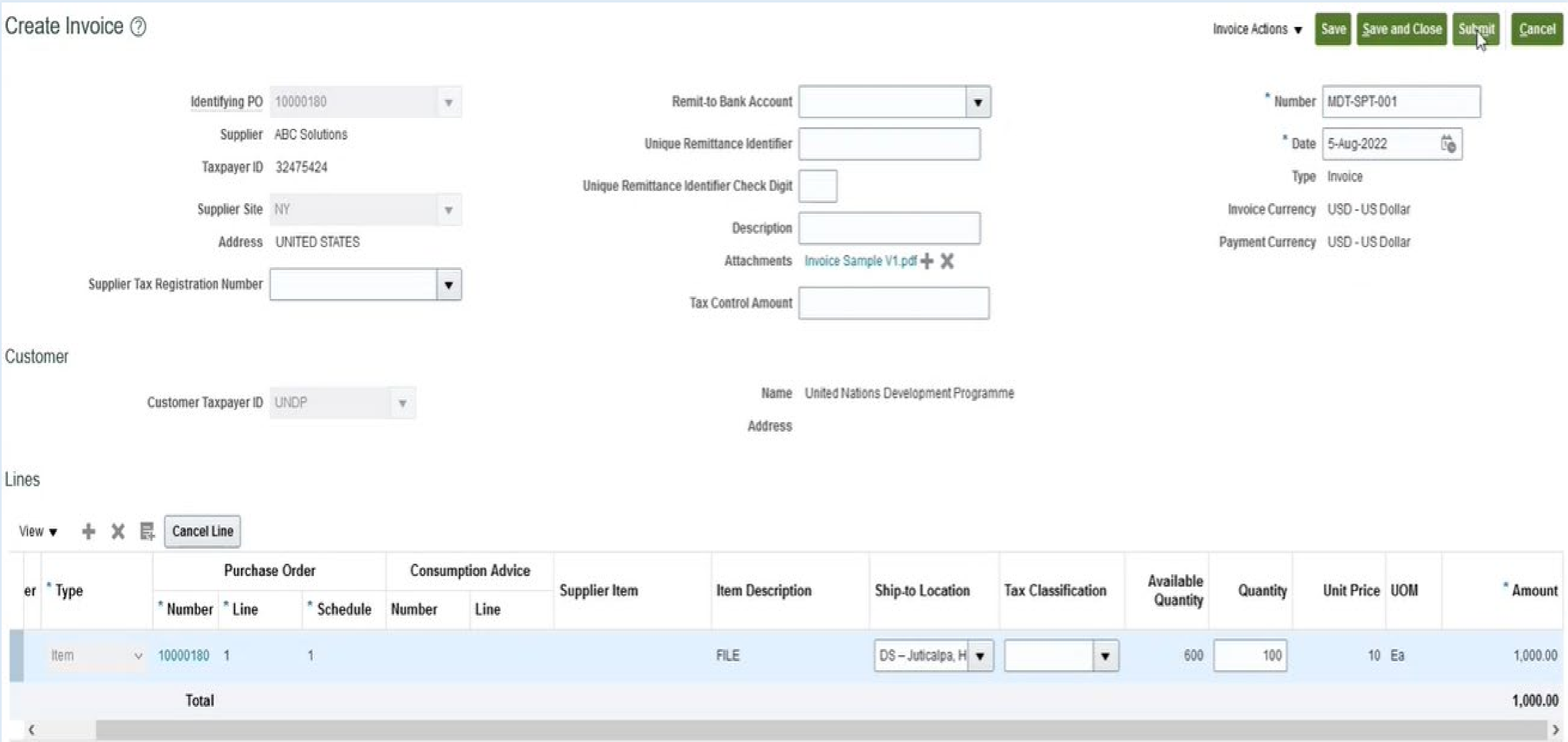
Step 7

- Repeat for the next Line.



Click to return to Manage Orders and Invoices Main Page

5.3 Create Invoice



Save:

Click *"**Save**"* to create a draft Invoice. Once saved the Invoice number cannot be reused.

Save and Close

Save draft invoice and exist the screen

Submit

Click ***"Submit"*** to send invoice directly to UNDP Accounts Payable for processing.
Once Submitted Invoice cannot be changed

Click to return to **Manage Orders** and **Invoices** Main Page

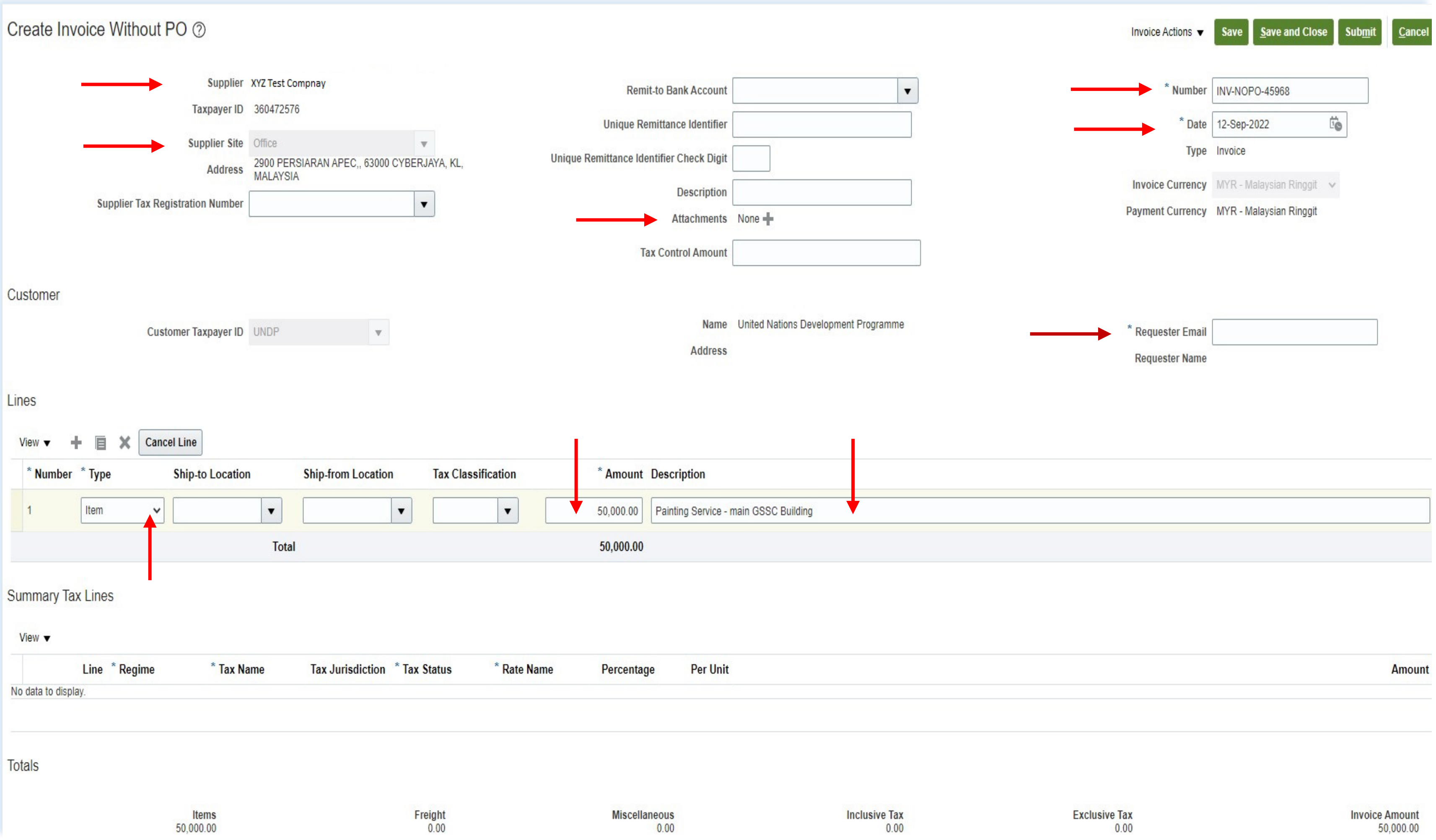
5.4 Create Invoice Without PO

After navigating to the Tasks segment on the Supplier Portal page shown above:

1. Click **Create Invoice without PO**
2. Enter all the mandatory fields:

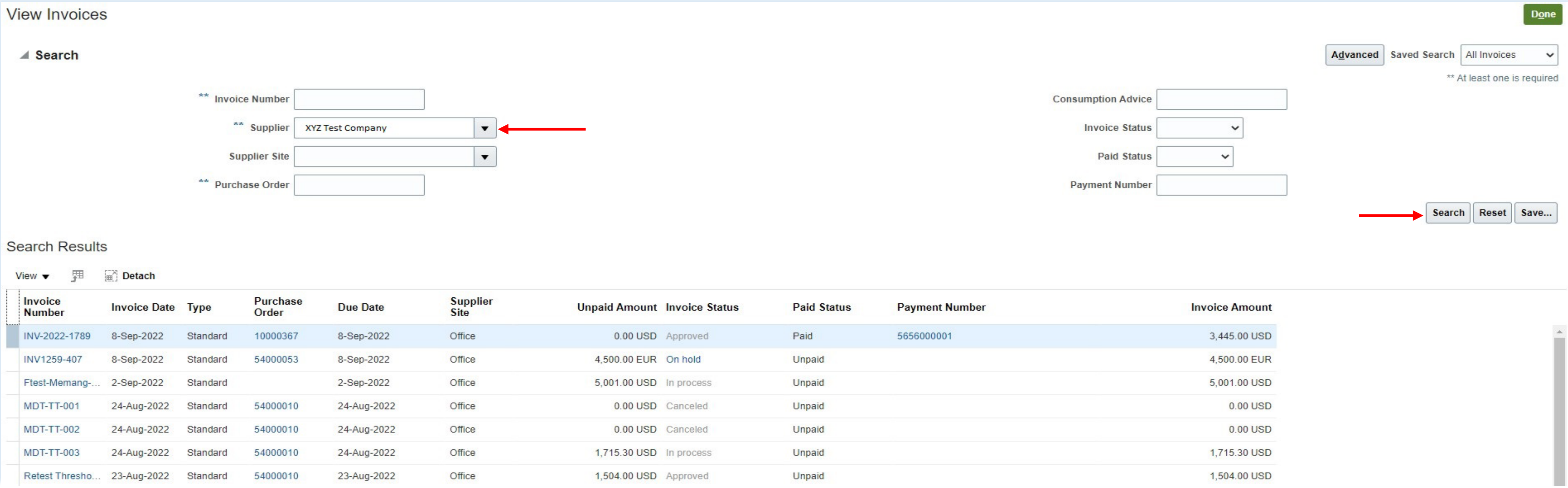
   Header:
   - Invoice Number
   - Invoice Date
   - Invoice Type
   - Supplier Site
   - Attachments
   - Currency
   - Requester email (UNDP Contact Person)

   Lines
   - Type
   - Amount
   - Description
3. Click "***Save***" / "***Save and Close***"
4. Submit the Invoice.
5. Click "***Done***" to exit screen
6. To downland an invoice copy click "***Printable page***"



Click to return to Manage Orders and Invoices Main Page

5.5 View Invoices

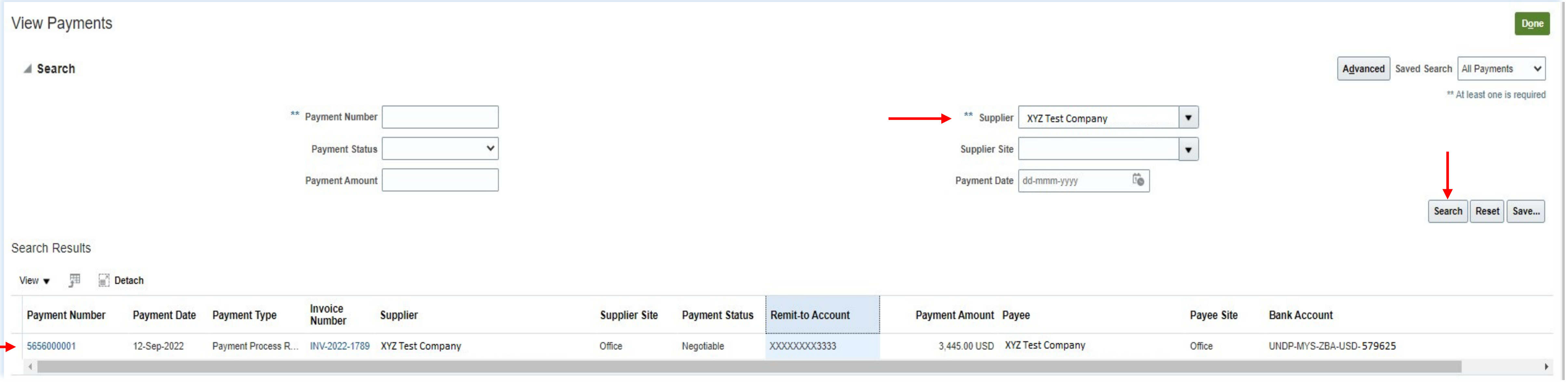


Invoice Number	Invoice Date	Type	Purchase Order	Due Date	Supplier Site	Unpaid Amount	Invoice Status	Paid Status	Payment Number	Invoice Amount
INV-2022-1789	8-Sep-2022	Standard	10000367	8-Sep-2022	Office	0.00 USD	Approved	Paid	5656000001	3,445.00 USD
INV1259-407	8-Sep-2022	Standard	54000053	8-Sep-2022	Office	4,500.00 EUR	On hold	Unpaid		4,500.00 EUR
Ftest-Memang-...	2-Sep-2022	Standard		2-Sep-2022	Office	5,001.00 USD	In process	Unpaid		5,001.00 USD
MDT-TT-001	24-Aug-2022	Standard	54000010	24-Aug-2022	Office	0.00 USD	Canceled	Unpaid		0.00 USD
MDT-TT-002	24-Aug-2022	Standard	54000010	24-Aug-2022	Office	0.00 USD	Canceled	Unpaid		0.00 USD
MDT-TT-003	24-Aug-2022	Standard	54000010	24-Aug-2022	Office	1,715.30 USD	In process	Unpaid		1,715.30 USD
Retest Thresho...	23-Aug-2022	Standard	54000010	23-Aug-2022	Office	1,504.00 USD	Approved	Unpaid		1,504.00 USD

1. Click "***View Invoices"*** on the supplier portal main page
2. Use any of the following search options to retrieve the exiting Invoices: Invoice Number, Supplier, Supplier Site , Purchase Order , Invoice / Paid Status.
3. Click on "***Search"***
4. The Invoice details will be retrieved in the results table including Invoice Date, Type , Order , Due Date, Payment Number, Invoice and Unpaid Amounts

Click to return to **Manage Orders** and **Invoices** Main Page

5.6 View Payments



1. Click ***"View Invoices"*** on the supplier portal main page
2. Use any of the following search options to retrieve the exiting Invoices: Payment Number, Payment Status , Supplier, Supplier Site , Payment Date and Amount.
3. Click on ***"Search"***
4. The payments list will be retrieved in the results table including Payment Number , Date, Type , Invoice Number , Remit-to Account, Payment Amount, Payee, Bank Account, etc.
5. Click on the ***"Payment Number"*** to view the details

Click to return to **Manage Orders** and **Invoices** Main Page

Click to return to TOC

6. Manage Supplier Profile

This section describes some additional Quantum Supplier Portal features that enable the bidders to view their bidding activity and update the information in their Supplier profile.

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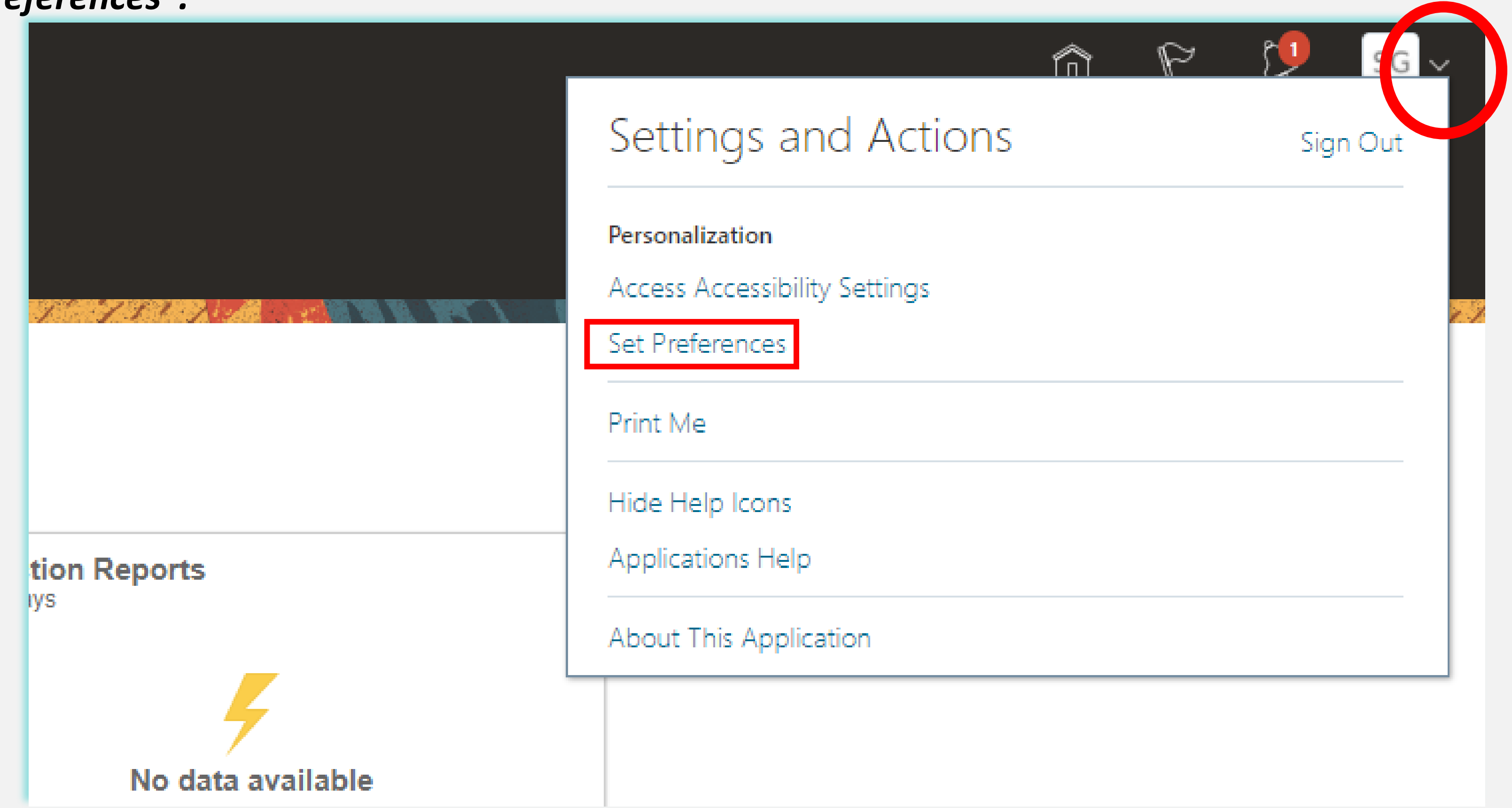
6.1 Setting your profile preferences

The Portal gives the possibility each supplier to set the preferences of their own supplier profile. This relates only to system interface and not solicitation documents.

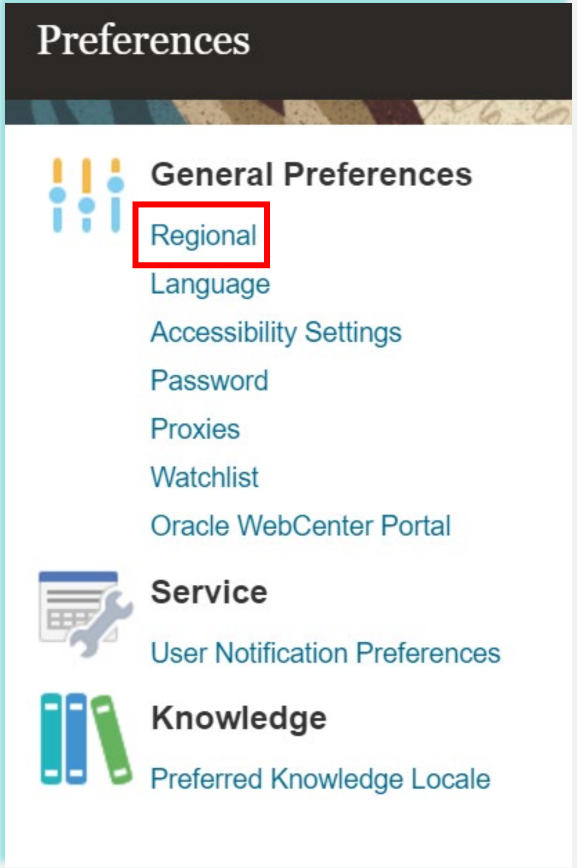
Once you login the system, click on the **"*Setting and Actions*"** icon in the right upper corner of your screen and select the option **"*Set Preferences*".**



Click to return to
Manage Profile
Main Page

6.1 Setting your profile preferences - Regional Preferences

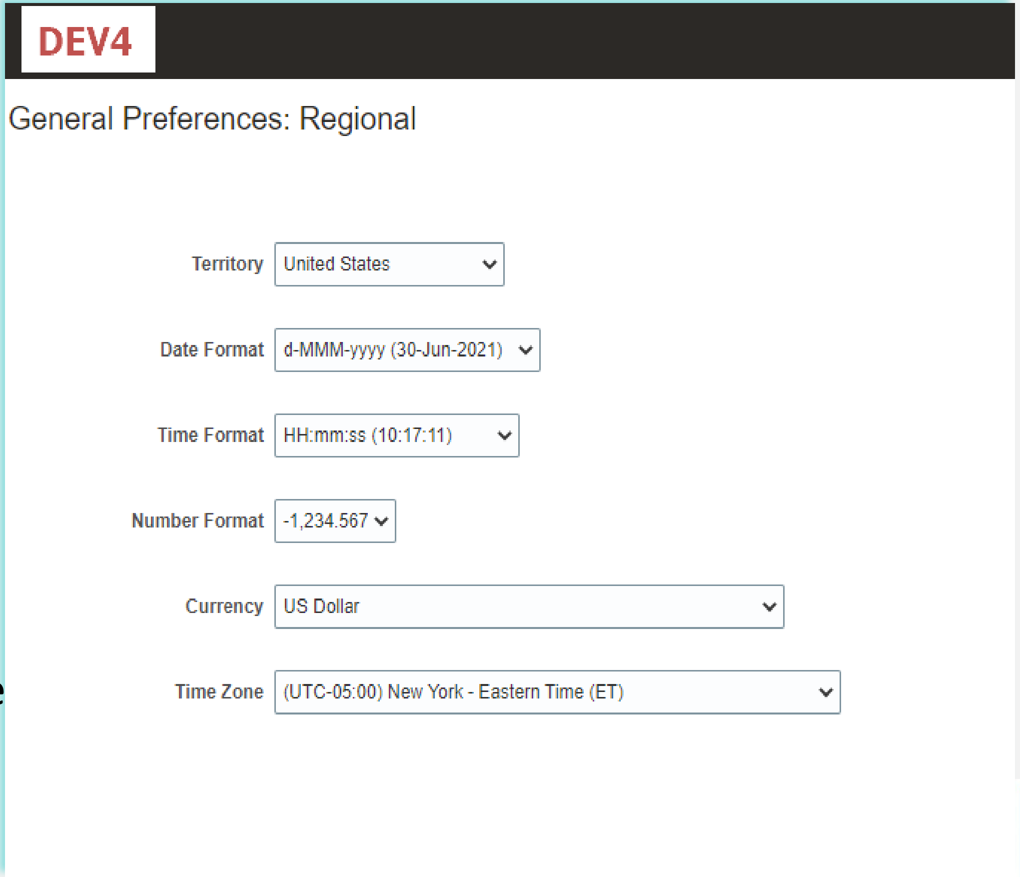
To set your Regional preferences, click the option "***Regional***". Then you can set several different preferences:



"***Territory***" Select your country.

"***Date and time format***" Select the format in which you wish the date/time to be presented.

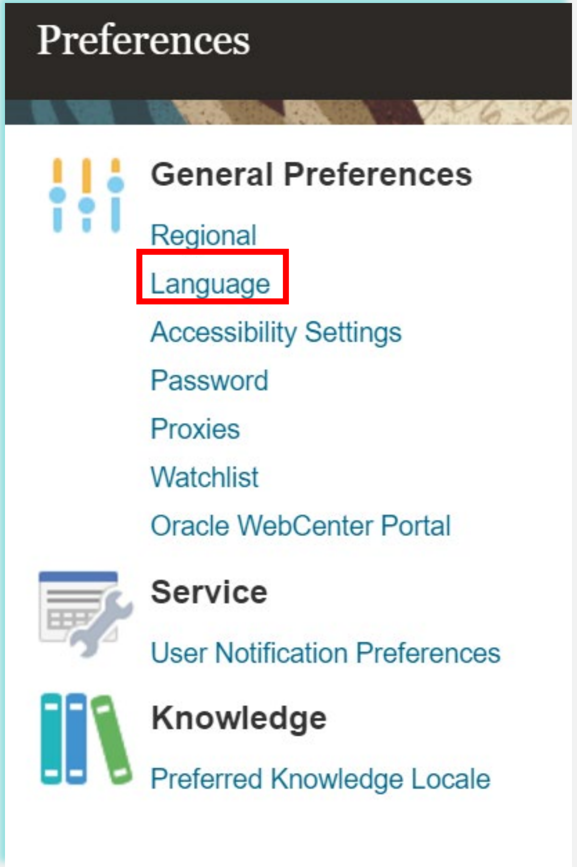
"***Time Zone***" Select the time zone in which you operate. This will convert the tender deadline to the exact time as per your chosen setting.



Click to return to
Manage Profile
Main Page

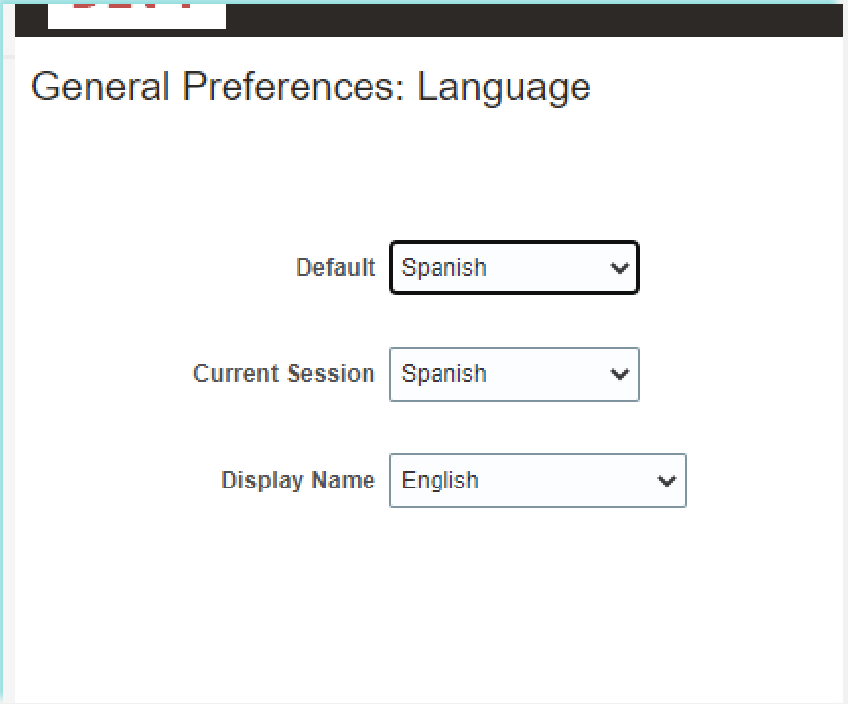
6.1 Setting your profile preferences – Language Preferences

The default language of the system is English. To set the language preferences, click the option "***Language***"



"Default" Select the default system language for your profile.

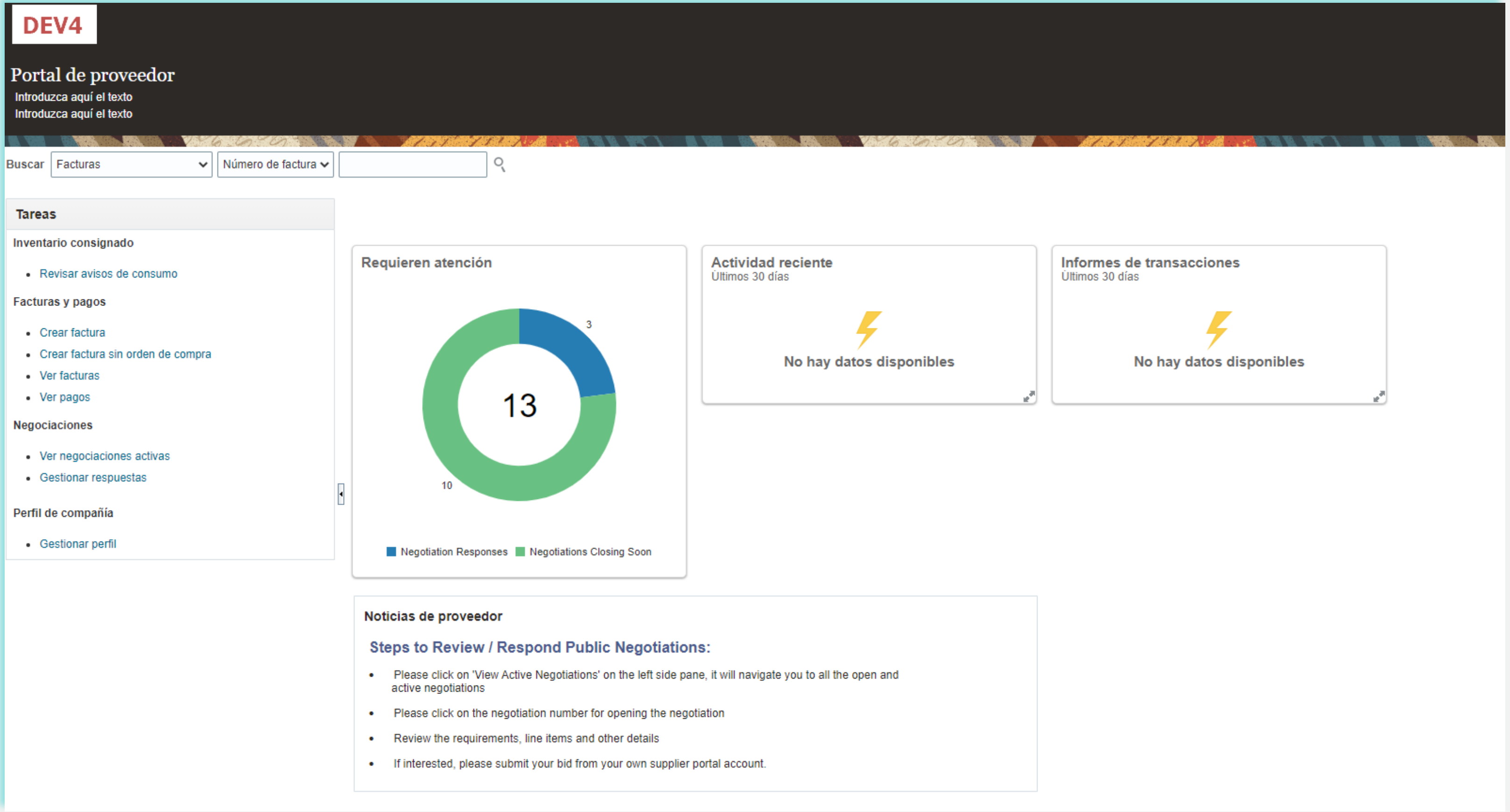
"***Current Session***" Select the system language for the current session. The system language will go back to the default one at the next login.



Click to return to
Manage Profile
Main Page

6.1 Setting your profile preferences – Language Preferences

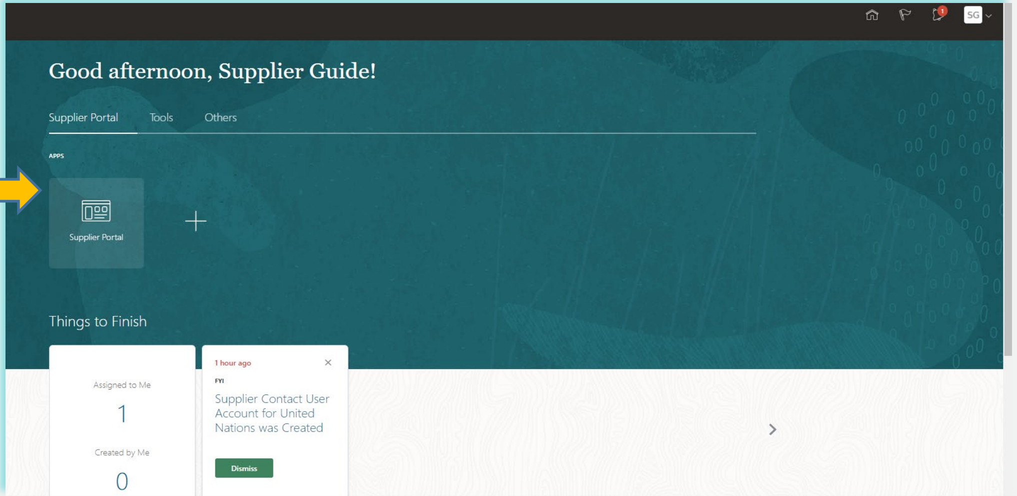
After selecting the preferred language, the system will display the menu as per your chosen setting.



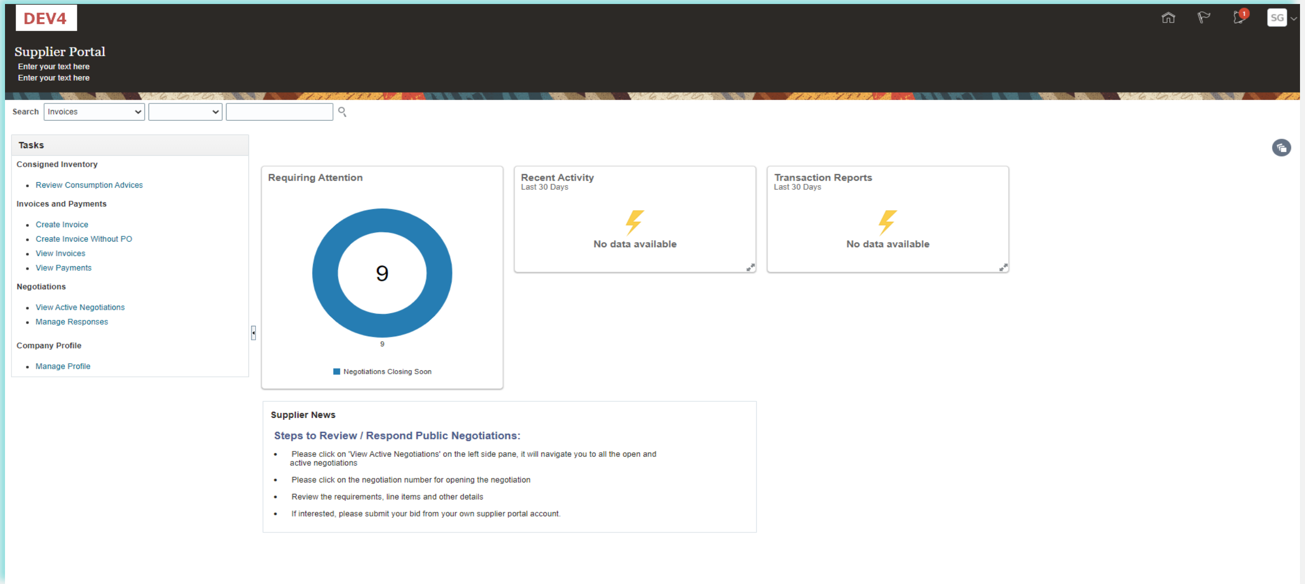
Click to return to **Manage Profile** Main Page

6.2 Update/Edit Supplier Profiles

To update your bidder profile, login to the system and click the "***Supplier Portal***" icon.



To view or manage/edit the data/info of your supplier profile, click the link "***Manage Profile***".



[Click to return to **Manage Profile** Main Page]

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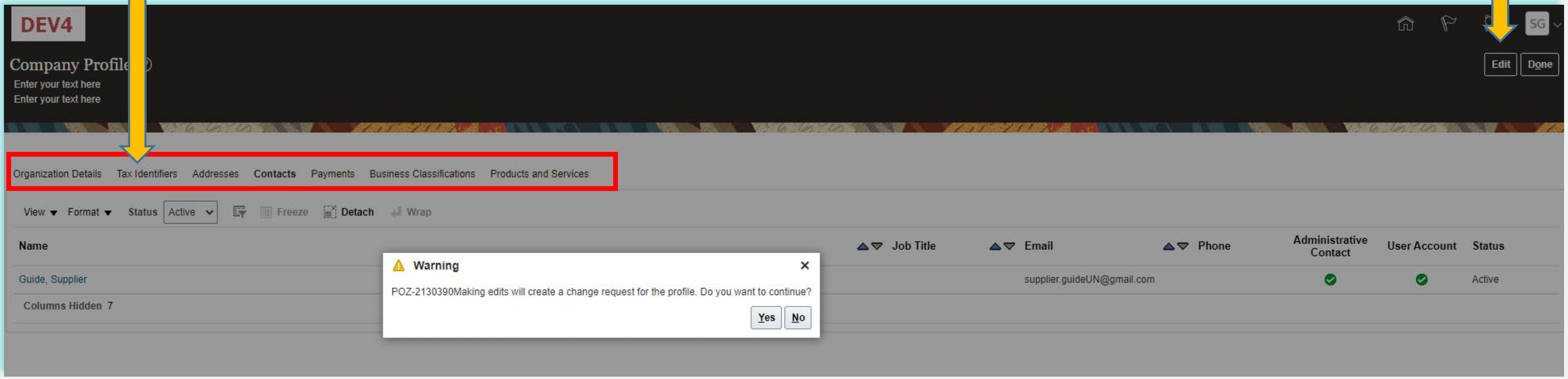
6.2 Update/Edit Supplier Profiles

Click on each tab to see different info of your Supplier profile. To open the profile for editing, click the ***"Edit"*** button and then "***Yes***"



Click to add text

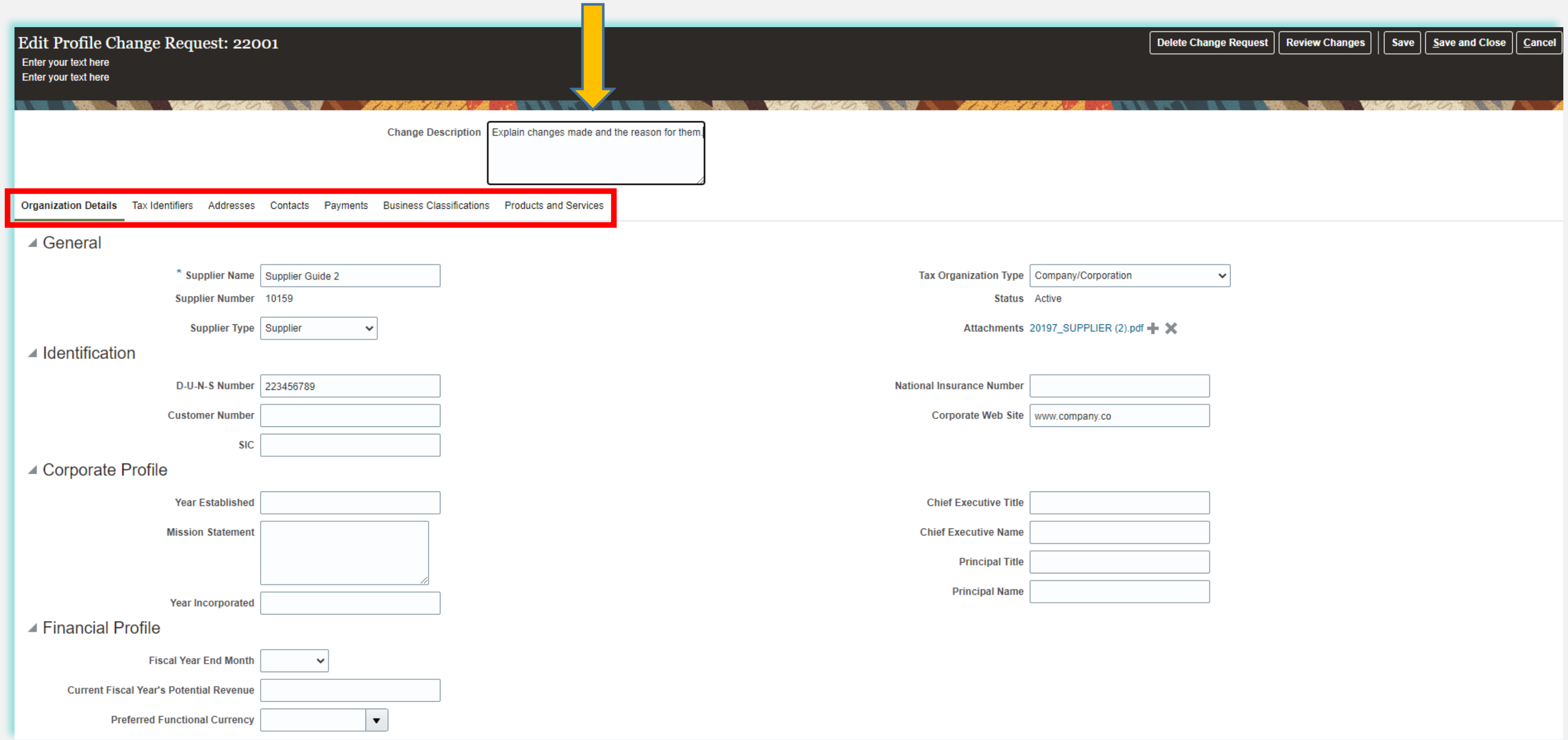
Click to return to **Manage Profile** Main Page

6.2 Update/Edit Supplier Profiles

Enter the short description of the implemented change in the "***Change Description***" field.

Click on different sections of your supplier profile to update the required details/information.

To modify, add or remove contact(s) - user(s) from your company with access to login the system- click the "***Contacts"*** section.



[Click to return to **Manage Profile** Main Page]

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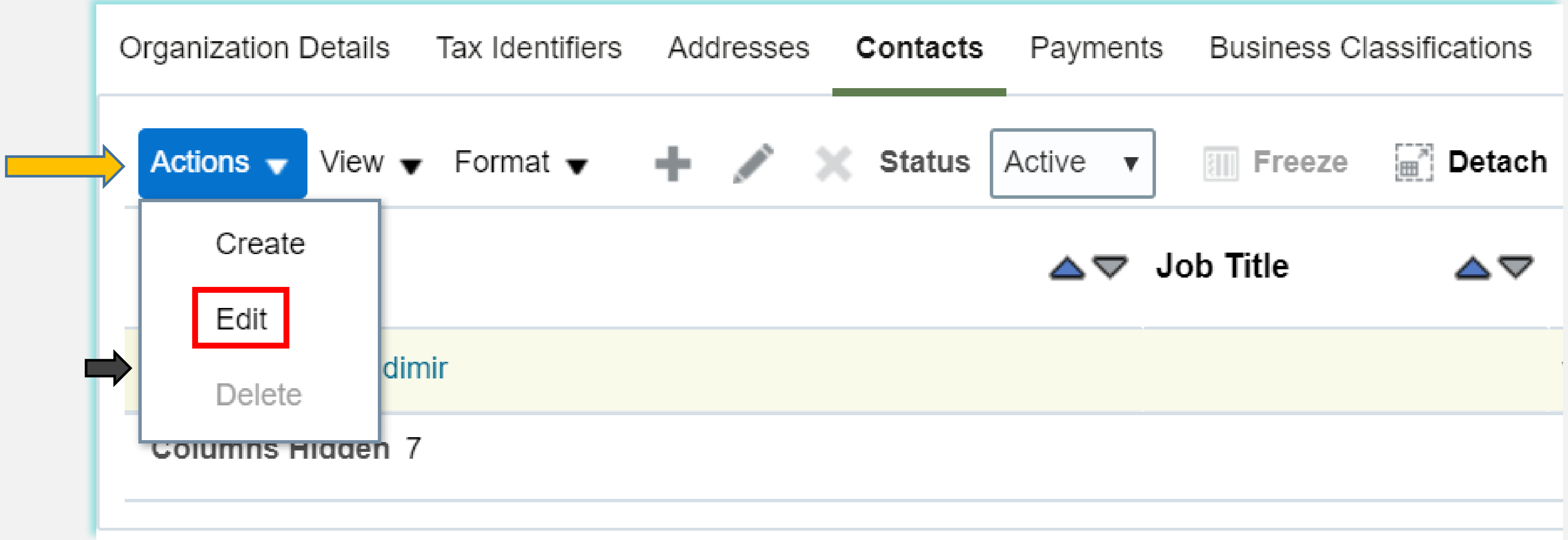
6.3 Manage Contacts (User Access) - Edit existing contact

Click the "***Contacts"*** page of your supplier profile details. Select the contact that you wish to edit by clicking on the corresponding row (the row will become highlighted). Then click "***Actions"*** and select the ***"Edit"*** option.



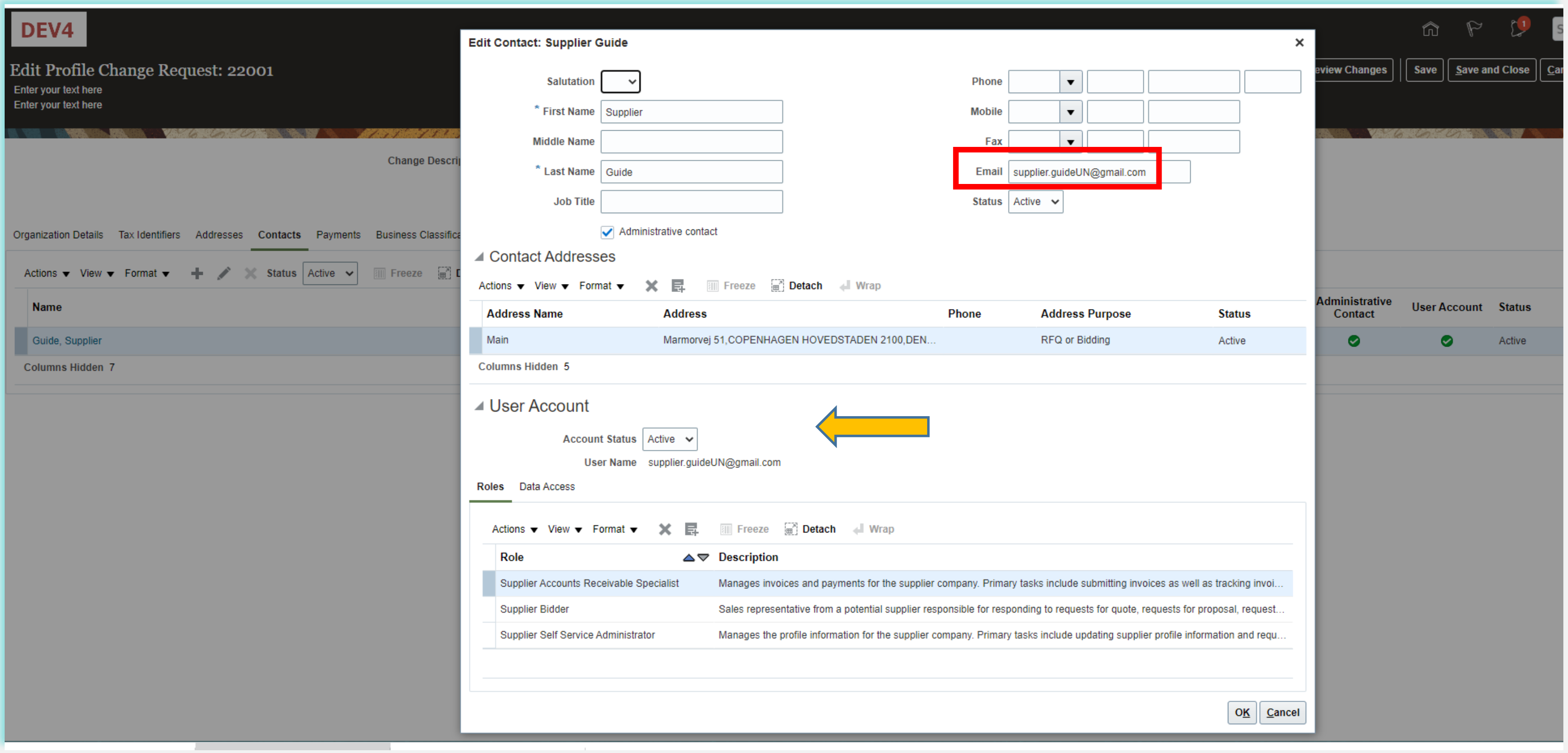
Click to return to **Manage Profile** Main Page

6.3 Manage Contacts (User Access) - Edit existing contact

You can modify different info of an existing contact, including the e-mail address. If you change the e-mail address, the automatically generated system notifications will be delivered to the new e-mail address.

IMPORTANT

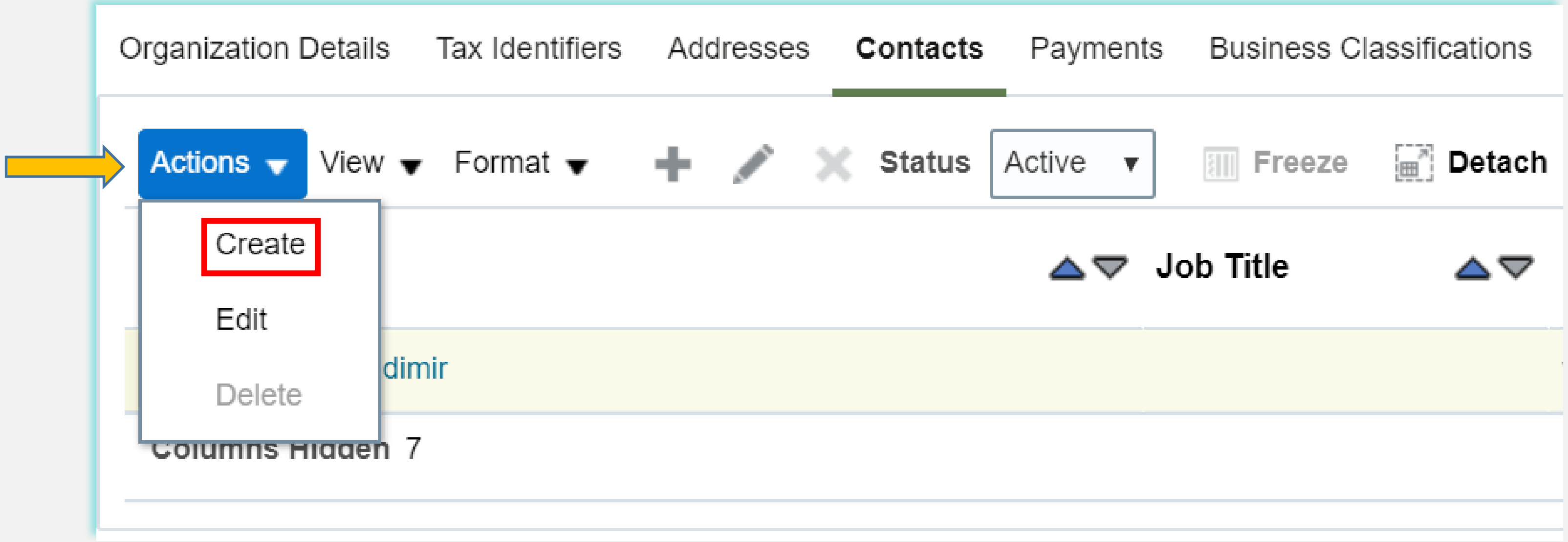
To login the system after the change, you will still need to enter your initially registered e-mail address as a User ID.



[Click to return to **Manage Profile** Main Page]

6.3 Manage Contacts (User Access) - Create new contact

To add new contact to your supplier profile, click "***Actions"*** and select the option **"Create".**



Click to return to
Manage Profile
Main Page

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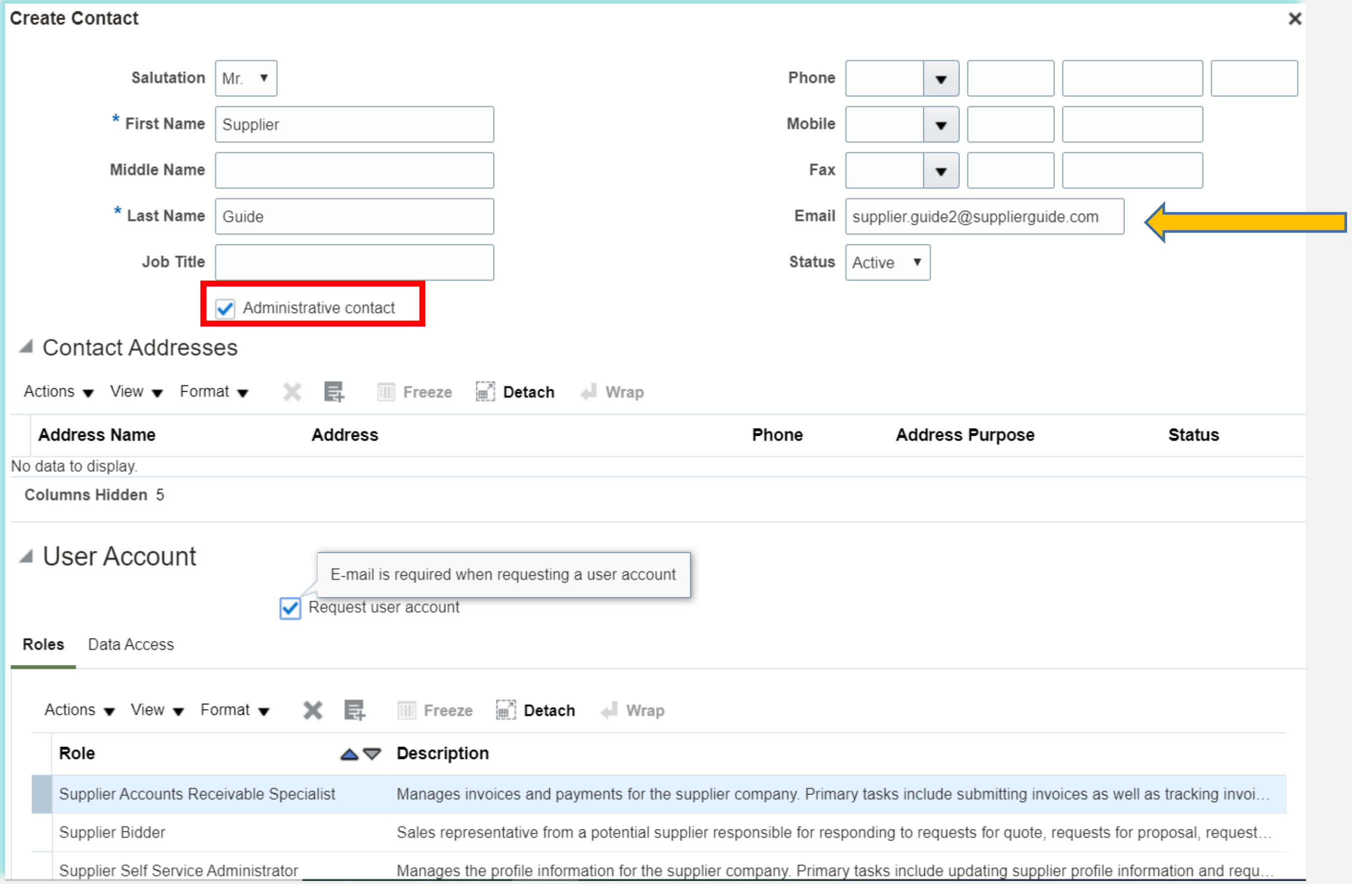
6.3 Manage Contacts (User Access) - Create new contact

Complete the required contact details. The field marked with * are mandatory.

Once the required contact details are entered, check the box "***Administrative contact***". This will give full access to the new contact and the person will be able to **prepare/submit bid responses** and to **manage the supplier profile,** including **add/remove contacts**.



The entered e-mail address will be used as a User ID at the login page for the new contact.

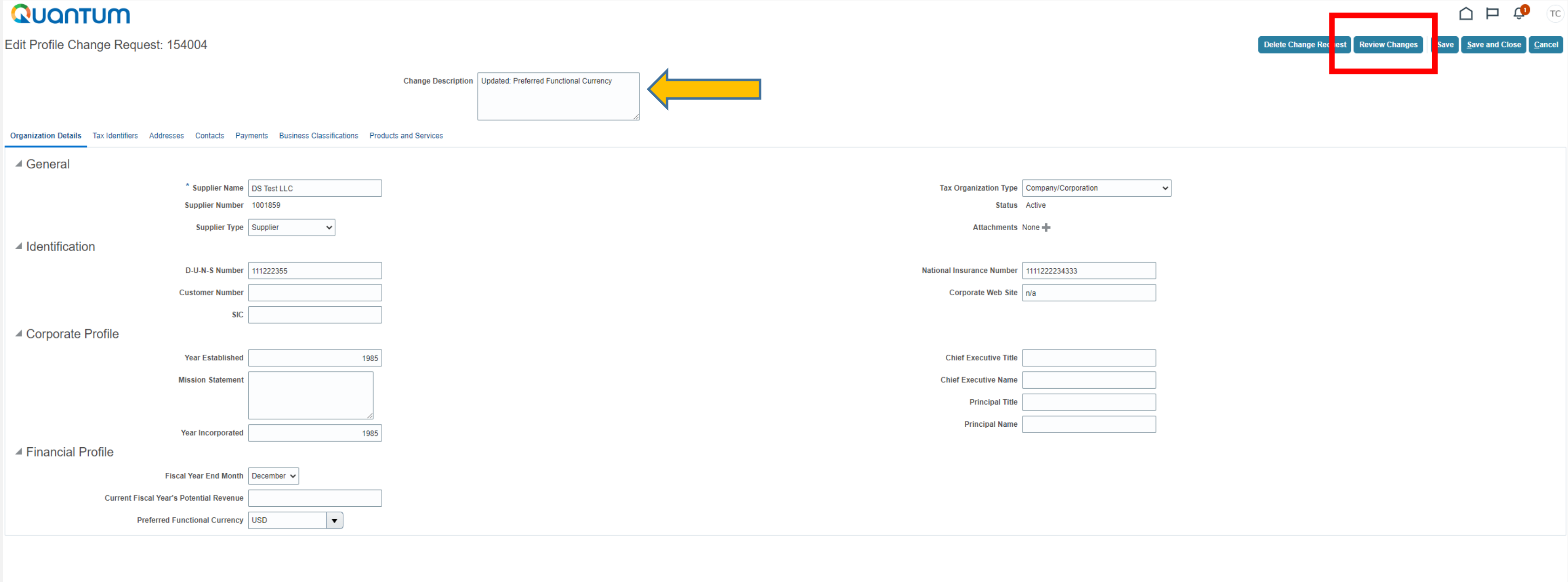
Check the box "***Request user account***" and click "***OK"*** at the bottom of the screen.

Click to return to **Manage Profile** Main Page

6.3 Manage Contacts (User Access) - Create new contact

Enter short summary of the implemented changes in the "***Change Description***" text box.

To save the changes, click on "***Save and Close***".



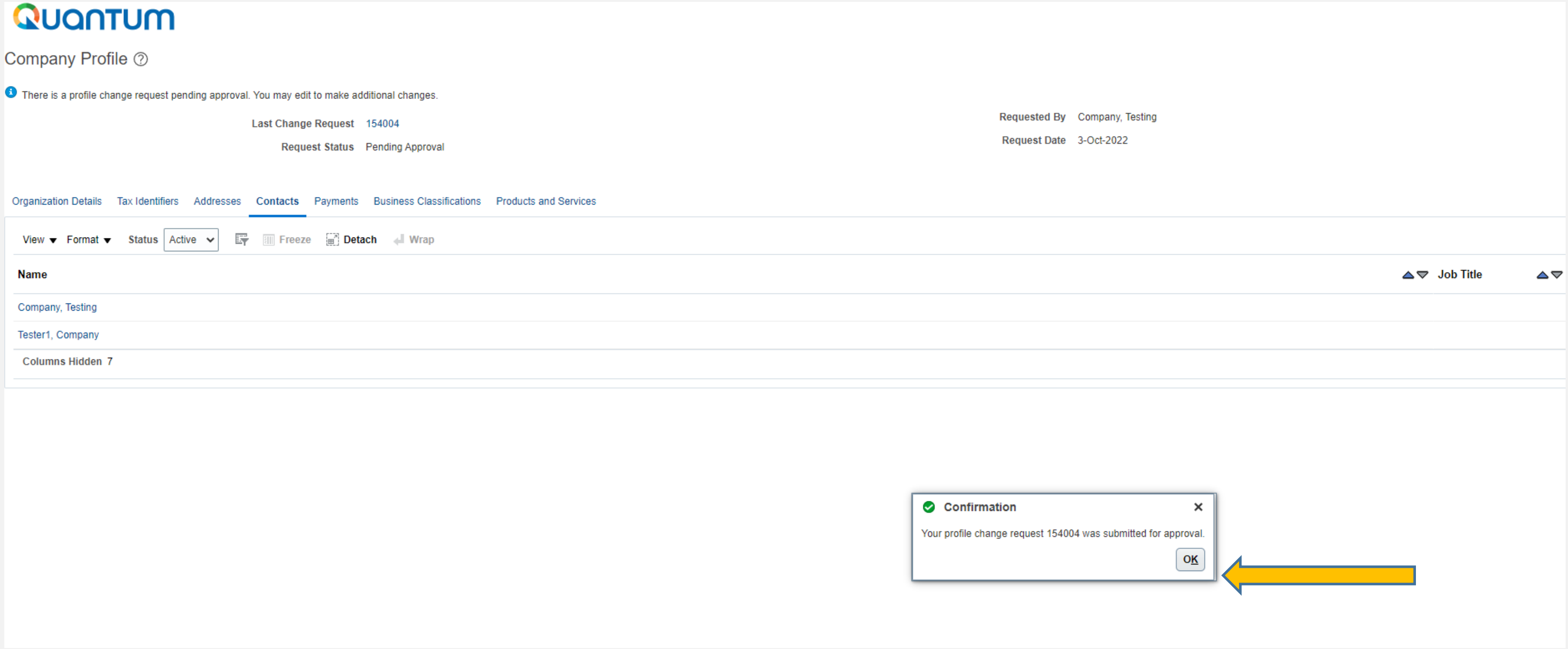
Click to return to **Manage Profile** Main Page

6.3 Manage Contacts (User Access) - Create new contact

A message will appear – “Your Profile change request was submitted for approval”

Please note that this will not require any further approval; Changes will be saved once the process is complet.

Click ***"OK"*** on the message.



[Click to return to **Manage Profile** Main Page]

Click to return to TOC

7. Helpdesk Support

This section provides details on who to contact for technical assistance, how to address some commonly asked questions and where to find additional resources on Quantum Supplier Portal.

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7.1 Technical Assistance

If you experience technical issues with the bid submission process, please contact the **focal point of the procurement office** as indicated in the solicitation document of the tender you wish to bid on.

To ensure your case is resolved as quickly as possible, when requesting helpdesk support, it is always recommended to share the following details:

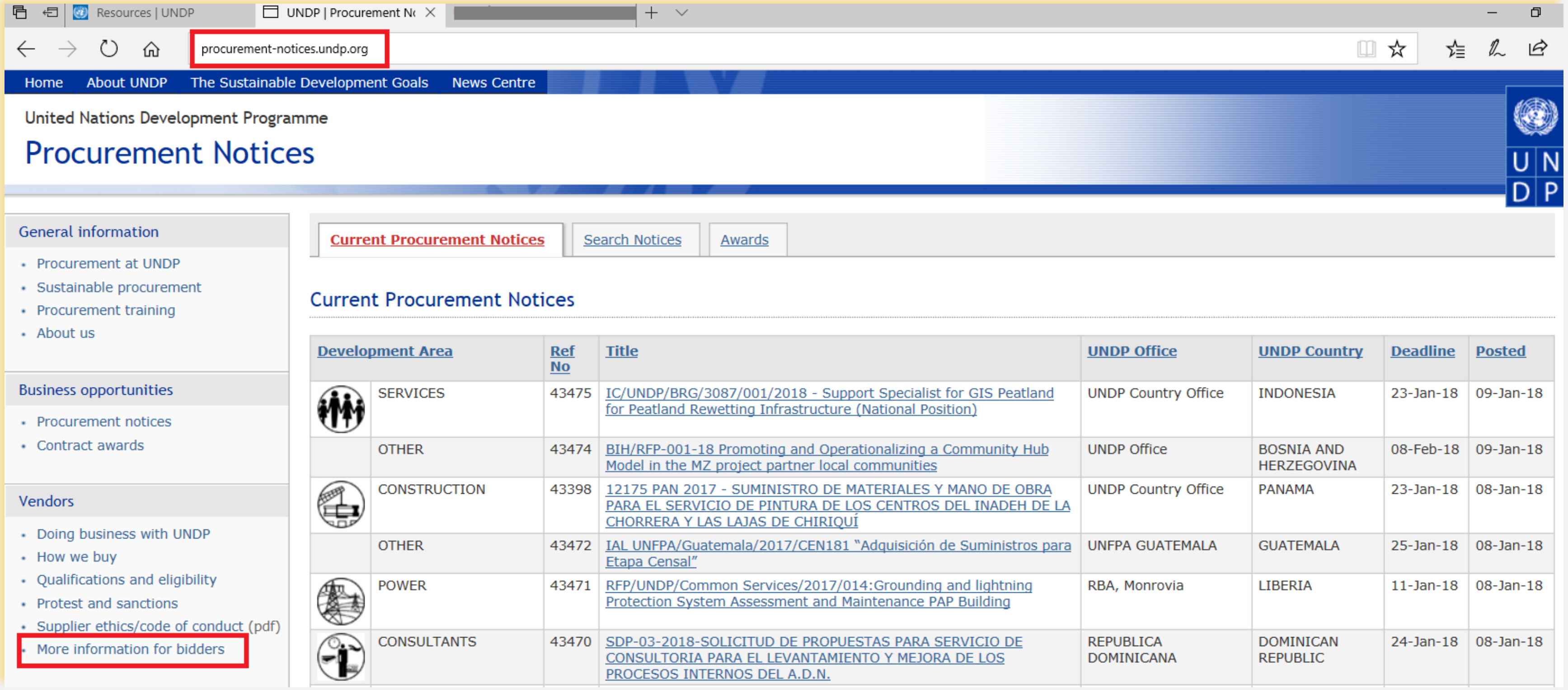
- Your User ID and Company name
- The Negotiation ID you are participating in (if applicable)
- Screenshots of any error or warning messages
- A brief description of the steps you took before encountering any errors or issues

Please always prepare and submit your bid well in advance of the deadline of the negotiation so that any issues can be addressed in time.

Click to return to **Helpdesk Support** Main Page

7.2 Additional Resources

To view additional resources on Quantum Supplier Portal, including video user guides and translated versions of this user guide (French, Spanish, Chinese, Arabic and Russian), go to the UNDP Procurement Notice Page http://procurement-notices.undp.org/ and click on ***"More Information for Bidders"*** at the bottom left-hand side of the page.



[Click to return to **Helpdesk Support** Main Page]

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7.3 Frequently Asked Questions

During Registration:

I was able to register, however I did not receive the second email. What should I do?

If you did not receive the second and the third e-mail with the link to reset the password and login the system, the registration of your Supplier profile was **not successful.** The reason could be one of the following:

- a Supplier Profile is already registered in the system with the same company name;

- a Supplier profile is already registered in the system with the same user/contact e-mail address or same Tax-id or DUNS number

For assistance,

1. ***Try forgotten password, if that does not work -***
2. ***please contact the procurement focal point managing the tender you are interested to participate.***

I was able to register and reset the password, however I did not receive the verification code. What should I do?

Check with your IT department and confirm that the domain oracle.com and undp.org are not blocked by your email firewalls.

Click to return to **Helpdesk Support** Main Page

7.3 Frequently Asked Questions

Log In Issues:

I cannot remember my password.

To reset your password, please go to the section on **Forgotten Passwords**.

I cannot remember my user name.

If you cannot remember your user name please contact the focal point of the procurement office as indicated in the solicitation document of the tender you wish to bid on.

During Bid submission

I cannot find any open tenders or the tender I am interested in.
Please ensure you have '***invited***' removed (should be blank), see the instructions here.

I cannot download tender documents.
Please ensure that your internet browser has enabled pop-ups. For more information on how to view and download solicitation documents, please go **here.**

7.3 Frequently Asked Questions

I submitted my bid but did not receive a bid confirmation email.
If you do not receive a confirmation email, you can confirm the status of your bid and check if it has been posted directly on the system. Please click **here** for further information on viewing your bid.

Managing your Account

I am trying to change my preferences but could not find my country.
Please select the nearest country in your time-zone.

Can I update the contact details in my bidder profile?

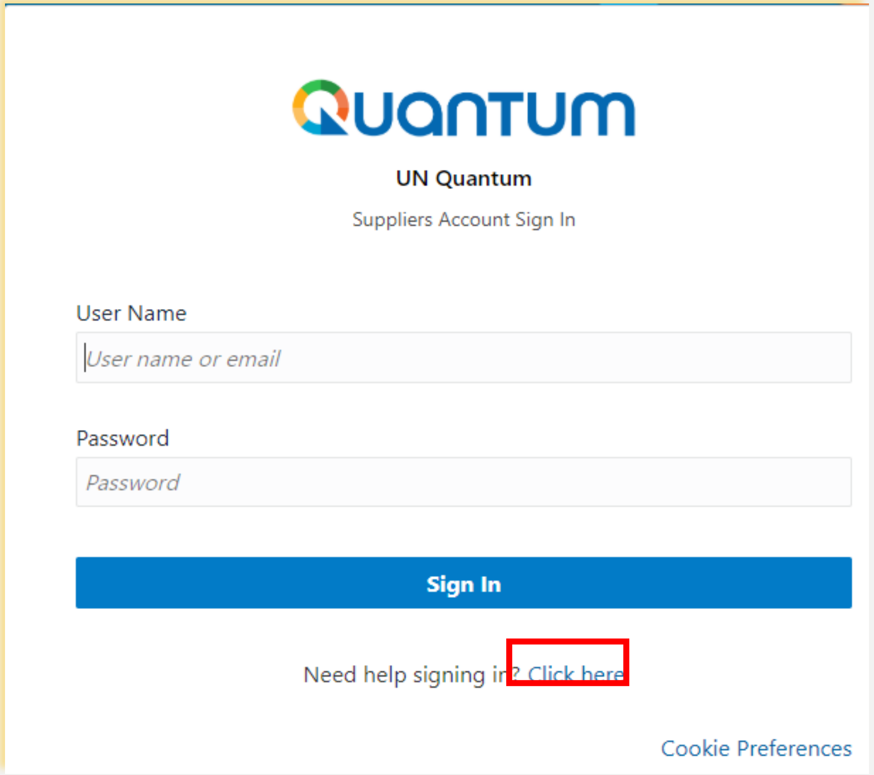
Yes. To update your bidder profile and other users registered under your profile, go to "***Manage Events and Place Bids***" → "***My Bidder Profile***" and update information as needed. See **Manage Bidder Profile** for more information.

Click to return to **Helpdesk Support** Main Page

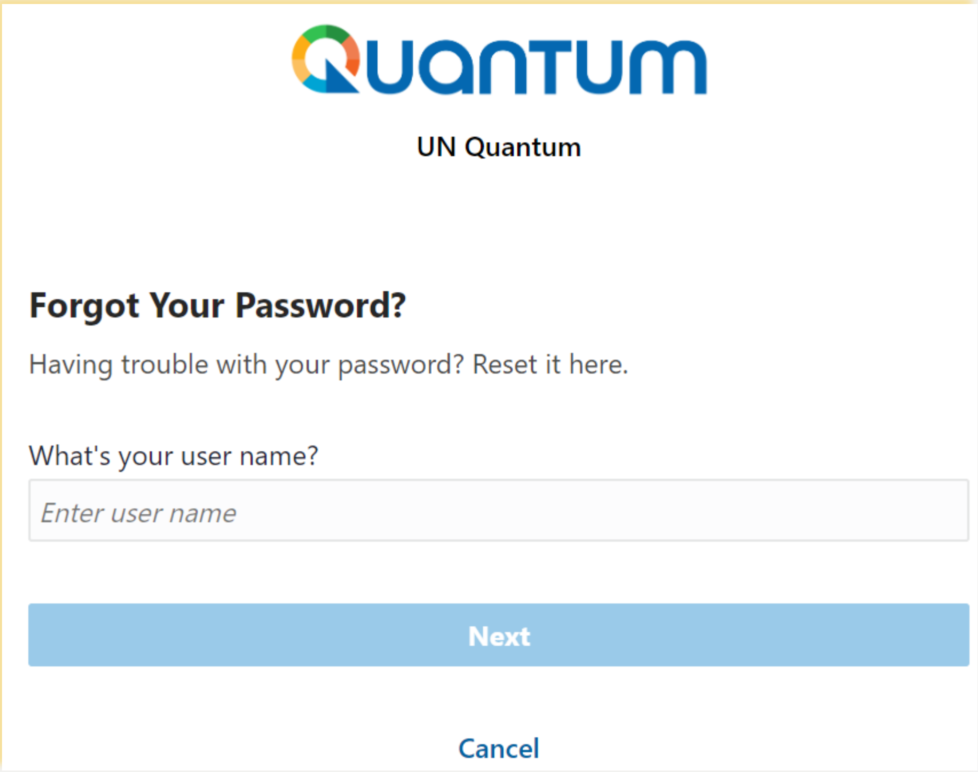
7.4 Forgot Password

If you have forgotten your password, please take the following steps:

1. To reset your password, click on *Need help signing in? Click Here*.



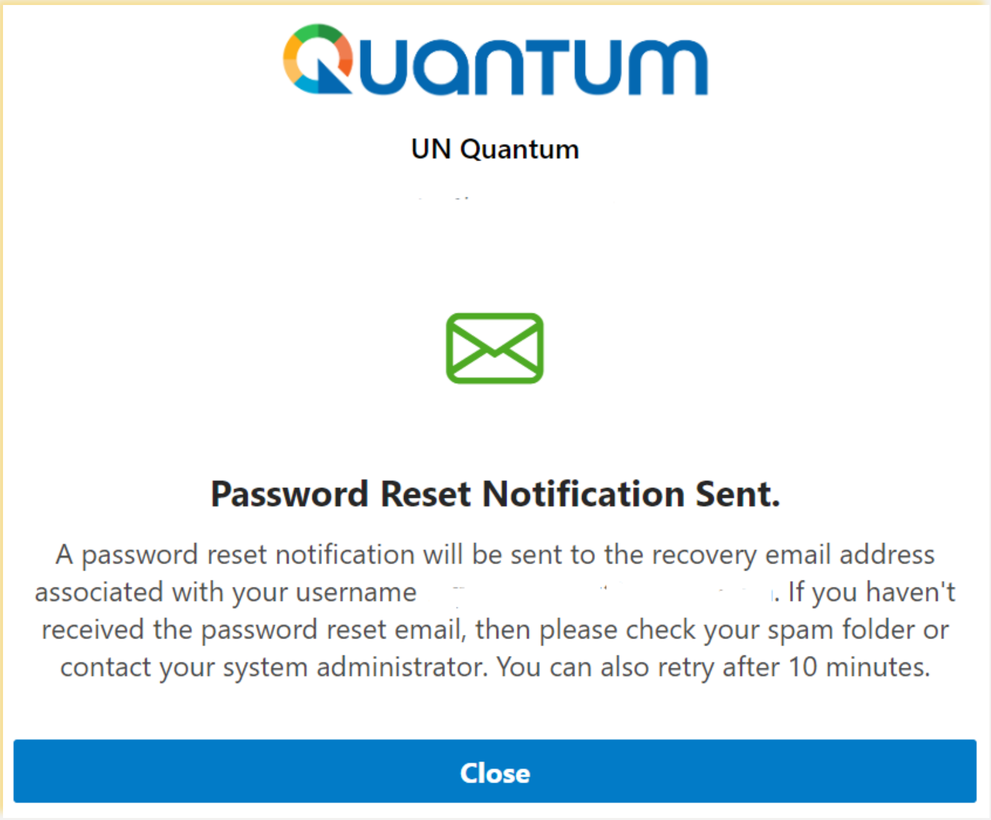
2. You will be prompted to enter your e-mail address, which is the User ID you entered during registration and click *Next*.



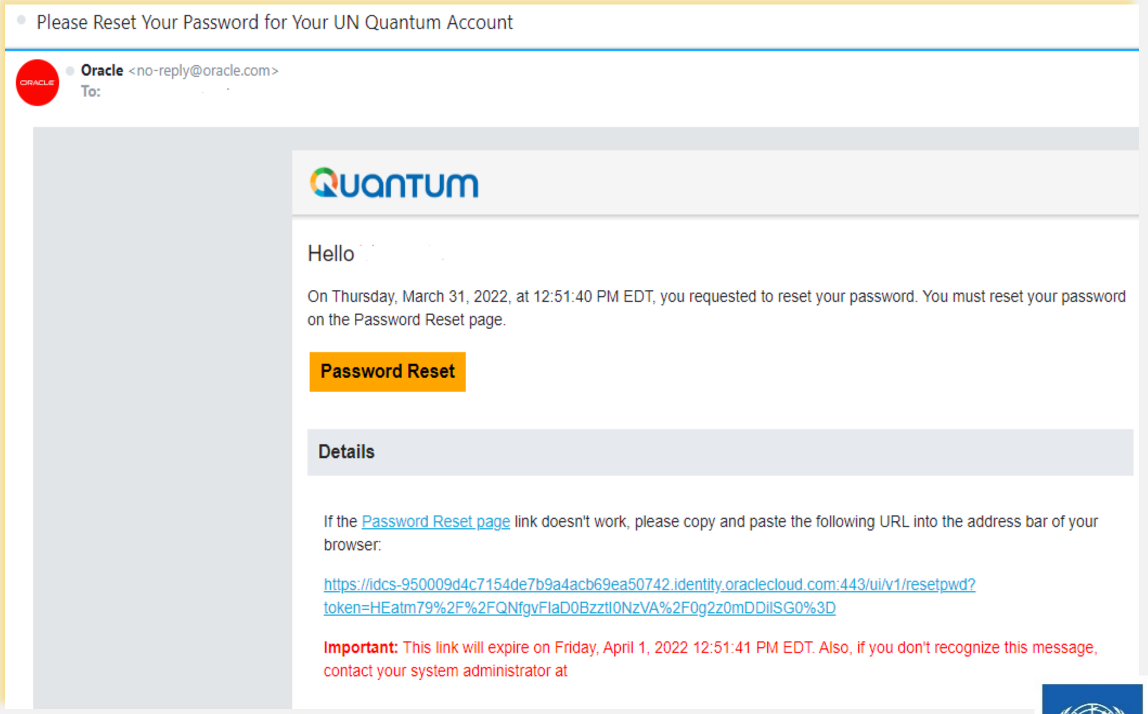
Click to return to **Helpdesk Support** Main Page

7.4 Forgot Password (continued)

3 A password reset notification email was sent to the email address associated with your Supplier Profile. Click Close and verify your Inbox/Spam (Junk) mailbox.



4 Verify the Inbox and/or the Spam/Junk mailbox of your email address and identify the email with the Password Reset link. Click on *Password Reset* or copy/paste the URL from the email into the address bar of your browser.



Click to return to
Helpdesk Support
Main Page

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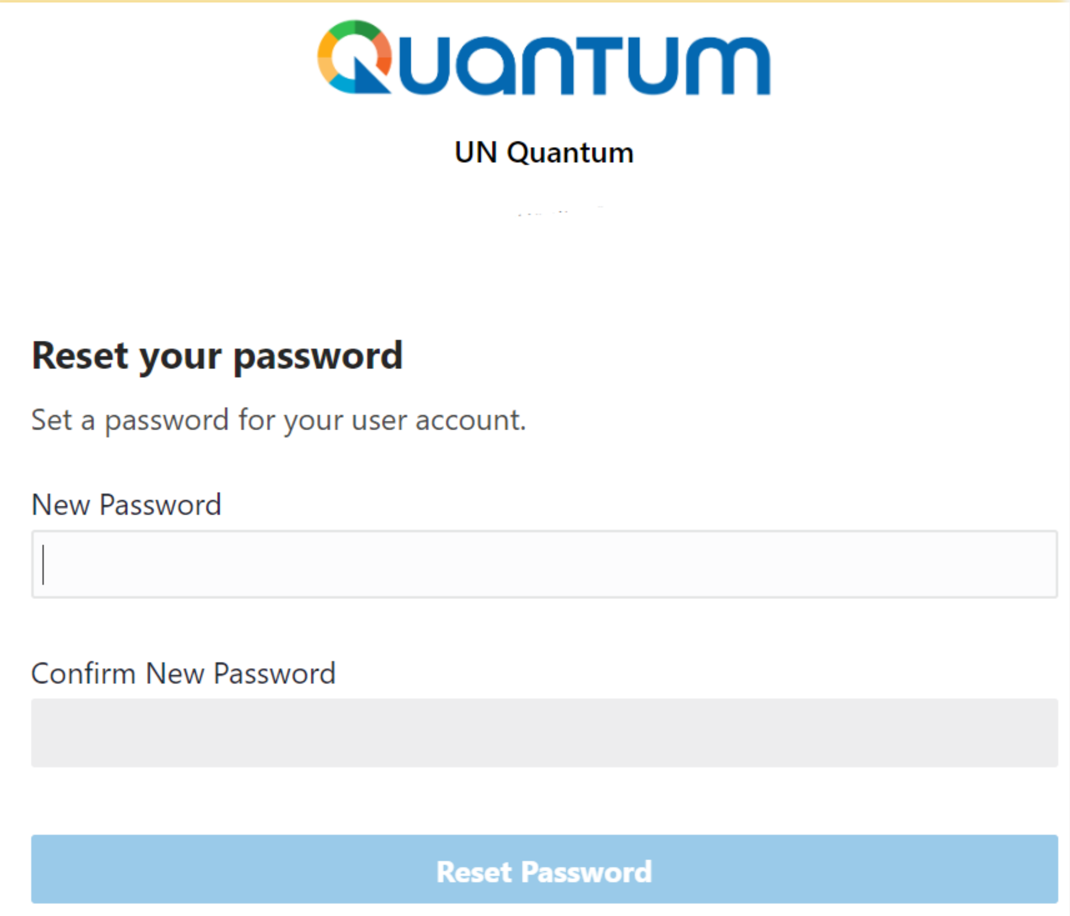
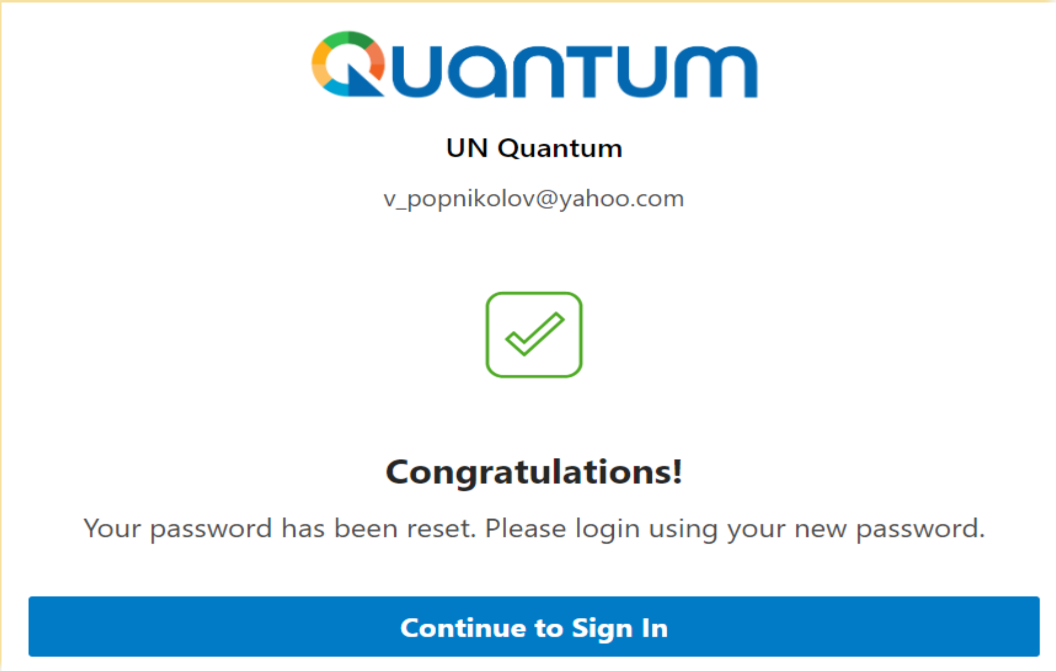
7.4 Forgot Password (continued)

5 Enter the new password. Confirm the new password. Click on *Reset Password.*



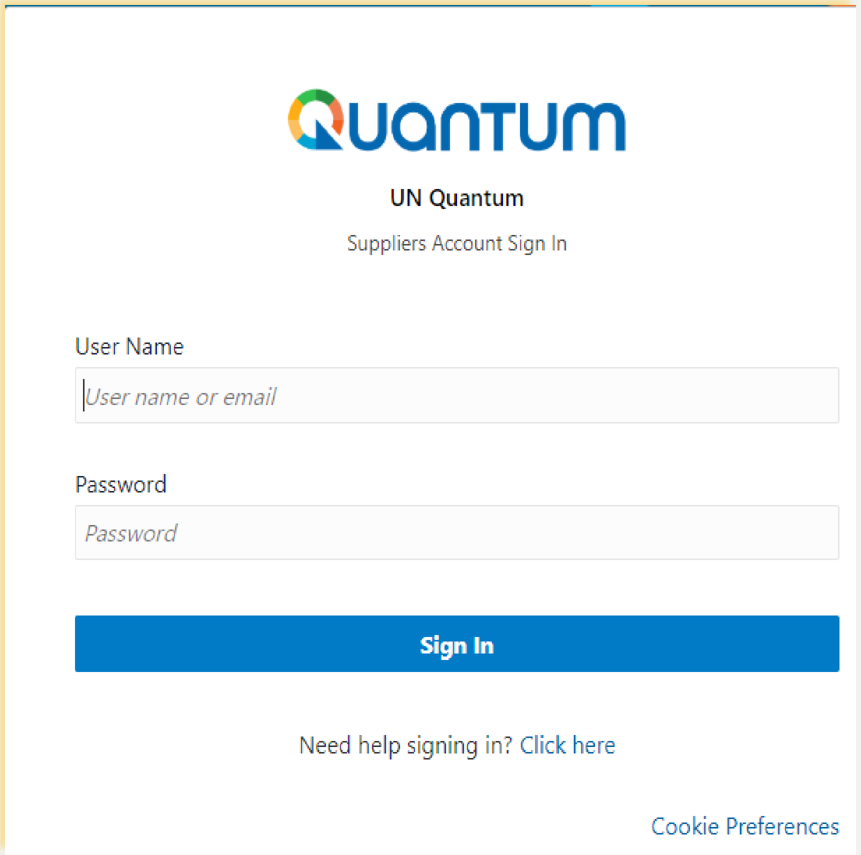
6 A message will pop-up on your screen and confirming that you that your password has been reset. Click on *Continue to Sign In* to go to the Login Page.
You will also receive an email confirming that your password has been changed.



Click to return to **Helpdesk Support** Main Page

7.4 Forgot Password (continued)

Enter your User-Name (the email address) and the Password, click on *Sign In* and complete the steps for the MFA email verification..



Click to return to
Helpdesk Support
Main Page

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Thank you for using UNDP Quantum Supplier Portal!

To view additional resources such as instructional videos for bidders and this user guide in other languages, please click here.

Click to return to TOC