Guide for UNFPA SCMU Suppliers using Supplier Portal Phase II

link

April 2024
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1. INTRODUCTION
Several United Nations Agencies, including:
1. United Nations Population Fund (UNFPA)
2. United Nations Development Programme (UNDP)
3. United Nations Entity for Gender Equality and Empowerment of Women (UNW)
4. United Nations Capital Development Fund (UNCDF)
5. United Nations University (UNU)
6. United Nations Volunteers (UNV)
7. United Nations Institute for Training and Research (UNITAR)
8. United Nations System Staff College (UNSSC)
9. World Meteorological Organization
10. International Civil Aviation Organization (ICAO)

have partnered together to implement the unified new ERP Oracle Cloud. This system includes a Supplier Portal designed to manage interactions with suppliers for orders, agreements and shipments management, providing more data visibility for suppliers. This document is intended for any supplier involved in procurement transactions with UNFPA and serves as a guide on how to use the online Supplier Portal.

IMPORTANT. In the initial phase, the new portal will be only introduced to suppliers holding Global BPA with UNFPA. Therefore, the Supplier Portal guide is intended specifically for these companies.

More UN Agencies are planning to join Quantum!
Benefits of Supplier Portal

- Communicate directly with buyers, reducing the need for intermediaries and facilitating faster response times.
- Easy sharing and management of documents such as purchase orders, invoices, and contracts, reducing paperwork and administrative burdens.
- Suppliers gain real-time visibility into the status of their orders, payments, and other transactions, enabling better planning and decision-making.
- Accurate and timely processing of orders, reducing errors and discrepancies that can lead to delays or disputes.
- Self-service tools and resources that empower suppliers to manage their accounts, update information, and resolve issues independently.
- Suppliers can track their compliance with contract terms enabling them to identify areas for improvement.
### 1. Phases of the Supplier Portal introduction

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>Go-live date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I</td>
<td>Introduction to Supplier Portal incl. ensuring access of International UNFPA suppliers holding valid Agreement with UNFPA SCMU (only) to the portal and full data visibility on transactions with UNFPA. Piloting collaboration (Phase II) with one BPA supplier.</td>
<td>November 20, 2023</td>
</tr>
<tr>
<td>Phase II</td>
<td>Initiating supplier collaboration on UNFPA Purchase Orders, Shipments and Company Profile.</td>
<td>April 08, 2024</td>
</tr>
<tr>
<td>Phase III</td>
<td>Initiating supplier collaboration on the remaining sections of the portal.</td>
<td>Approx. by 2024/2025</td>
</tr>
</tbody>
</table>
2. MAIN NAVIGATION PAGE
3. Main Navigation Page - structure

- Search by Category
- "Home" button
- Notifications
- Sections/Tasks
- Supplier News
2. Main Navigation Page - scope of release

Supplier Portal

**Tasks**
- **Orders**
  - Manage Orders
  - Manage Schedules
  - Acknowledge Schedules in Spreadsheet
- **Agreements**
  - Manage Agreements
- **Channel Programs**
  - Manage Programs
- **Shipments**
  - Manage Shipments
  - Create ASN
  - Create ASBN
  - Upload ASN or ASBN
  - View Receipts
  - View Refunds
- **Connects**
  - Manage Deliverables
- **Invoices and Payments**
  - Create Invoices
  - Create invoices without PO

**Order Management Section**
- Agreements changed or canceled

**Agreement Management Section**
- VIEW ONLY
- This section is not implemented by UNFPA

**Shipment Management Section**
- This section will be implemented by UNFPA during Release III

**Invoice and Payment Section**
- VIEW ONLY
2. Main Navigation Page - scope of release (continued)

- Invoices and Payments
  - Create invoice
  - Create Invoice Without PO
  - View Invoices
  - View Payments

- Negotiations
  - View Active Negotiations
  - Manage Responses

- Qualifications
  - Manage Questionnaires
  - View Qualifications

- Company Profile
  - Manage Profile

Invoice and Payment Section
- Implemented
- To be implemented
- On hold

This section will be implemented by UNFPA during Release III

This section is not implemented by UNFPA

Company Profile Section

UNFPA Quantum Supplier Portal Guide
2. Main Navigation Page - how to search

Step 1. Select the category (e.g., “Orders”, “Agreement”, etc.)

Step 2. In the search field please insert the identifier (e.g., for PO: 700035305 and BPA: UNFPA-HQ AGMT-10291)

Tip
If you need to get a quick overview within a category then simply choose the category and click on the magnifying loupe.
3. MANAGE PURCHASE ORDERS
This chapter applies exclusively to “Spend Authorized” suppliers with active user profiles at UNFPA.

It offers an overview of how to view and manage UNFPA Purchase Orders in the Supplier Portal, which can be accessed under the “Tasks”/ “Orders” section of the Supplier Portal Main Page.
3. PO and Change Order Status definitions

### Definitions

#### Purchase Order Statuses:

- **"Pending Supplier Acknowledgment"**: Supplier to acknowledge the PO for the status to change to “Open”
- **"Open"**: The Order is open for receiving and Invoicing
- **"Closed for Receiving"**: The Order is fully received
- **"Closed for Invoicing"**: The Order is fully invoiced
- **"Cancelled"**: The Order is cancelled
- **"Rejected"**: PO has been rejected by the PO Approver or the Supplier
- **"On Hold"**: The Order is on hold; no transactions can be created.

#### Change Order Statuses:

- **"Pending Supplier Acknowledgment"**: Supplier to acknowledge the Change Order
- **"Incomplete"**: The Change Order is created but not submitted for UNFPA buyer’s approval
- **"Pending Approval"**: The Change Order is pending approval by the buyer
- **"Rejected"**: Change Order has been rejected by Buyer
<table>
<thead>
<tr>
<th>Action</th>
<th>Before</th>
<th>From 08 April 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNFPA shares RFQ (or any other solicitation document)</td>
<td>Per email</td>
<td>Per email</td>
</tr>
<tr>
<td>Supplier receives PO, SIs and other documents</td>
<td>Per email</td>
<td>Through Supplier Portal</td>
</tr>
<tr>
<td>Supplier acknowledges and accepts PO</td>
<td>Per email</td>
<td>Through Supplier Portal</td>
</tr>
<tr>
<td>Goods Supplier requests change on Due Date / offers PO header discount / splits shipment</td>
<td>Per email</td>
<td>Through Supplier Portal</td>
</tr>
<tr>
<td>UNFPA requests changes to PO through a PO Change Order</td>
<td>Per email</td>
<td>Through Supplier Portal</td>
</tr>
<tr>
<td>Goods Supplier shares draft of shipping documents to obtain “green light” to ship</td>
<td>Per email</td>
<td>Per email</td>
</tr>
<tr>
<td>Goods Supplier shares FCR, invoice and other shipping documents after “greenlight” and requests payment</td>
<td>Per email</td>
<td>Through Supplier Portal</td>
</tr>
</tbody>
</table>
# 3. Purchase Order Dates

<table>
<thead>
<tr>
<th>Quantum PO Date</th>
<th>Line Type “Goods”</th>
<th>Line Type “Services”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Delivery Date (RDD)</td>
<td>RDD is a date when the goods are required to be delivered to the beneficiary by the Requisitioner and will be validated by the system on the PO</td>
<td>RDD shall be interpreted as the “Due Date” for the services to be rendered, as agreed between UNFPA and the Service Provider. *Specifically for Freight Forwarder Services, RDD shall be interpreted as the “Due Date”, the Goods Pick up Date from the Goods Supplier Requested Delivery Date = ‘Due Date’ in the PO PDF</td>
</tr>
<tr>
<td>Promised Delivery Date (PDD)</td>
<td>Not Applicable</td>
<td>PDD shall be interpreted as the Promised Date for the services to be rendered, as agreed between UNFPA and the Service Provider. *Specifically for Freight Forwarder Services, PDD shall be interpreted as the Promised Goods Pick-up Date from the Goods Supplier.</td>
</tr>
<tr>
<td>Requested Ship Date (RSD)</td>
<td>RSD shall be interpreted as the “Due Date” which is the estimated date of departure (ETD) into the custody of the first carrier for transportation to the named place of destination. Requested Ship Date = ‘Due Date’ in the PO PDF</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>Promised Ship Date (PSD)</td>
<td>PSD shall be interpreted as the Promised estimated date of departure (Promised ETD) into the custody of the first carrier for transportation to the named place of destination.</td>
<td>Not Applicable</td>
</tr>
</tbody>
</table>
3. Purchase Order Dates (continued)

- **Managed by UNFPA**
  - Requested Ship Date (fka PO Due Date)
  - Requested Delivery Date (please disregard)

- **Managed by Supplier**
  - Promised Ship Date (fka PO ETD)
  - Promised Delivery Date (fka PO ETD)

- **Stamped by Quantum - not visible in the Supplier Portal**
  - Original Promised Ship Date
  - Original Promised Delivery Date

PO Line Type:
- "Goods"
- "Services"
3. Purchase Order Dates: PO creation stage (continued)

**PO Dates at the time of PO creation**

- **RSD = PSD** (Goods PO Line)
- **RDD = PDD** (Services PO Line)
- **RSD = PSD = RDD = PDD** (Goods and Freight Services PO)

**IMPORTANT**
For Goods PO Lines, please disregard RDD until further notice

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**UNFPA Quantum Supplier Portal Guide**

Click to return to TOC
“Requested” and ‘Promised’ Dates shall be adjusted

Examples when suppliers are not responsible for the delay:
1. Force majeure
2. Delay caused by SCMU or a third party contracted by SCMU
3. Purchase Order Dates: Revision of Dates when Supplier is responsible for the delay (continued)

"Requested" Dates shall **not** be adjusted

"Promised" Dates must be adjusted

**GOODS LINE**

<table>
<thead>
<tr>
<th>RSD</th>
<th>PSD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Ship Date</td>
<td>Promised Ship Date</td>
</tr>
</tbody>
</table>

**SERVICES LINE**

<table>
<thead>
<tr>
<th>RDD</th>
<th>PDD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Delivery Date</td>
<td>Promised Delivery Date</td>
</tr>
</tbody>
</table>

**Suppliers are responsible for delays** when the RSD/RDD will not be met and the delay is announced **after** acceptance of the purchase order (except in cases of force majeure or delay caused by a third party contracted by UNFPA).
3. How to search by Line Description or Supplier Item

Tip
To include “Closed” POs in your Search, select “Yes” in field “Include Closed Documents”.

Search by PO header details

“Supplier Item” is equivalent to a “Manufacturer Product Code” as per your BPA with UNFPA.

Search by PO schedule to see the overview on PO line level

Search by PO line description
3. How to search Purchase Order by UN Agency and Status

UNFPA Quantum Supplier Portal Guide
3. How to search by Order Number

Step 1. Enter PO number

Step 2. Click on “Search”

Step 3. Click on the hyperlinked text to open a PO
3. How to tailor your menu: Actions Bar

Manage Orders

Search
- Sold-to Legal Entity
- Bill-to BU
- Supplier Site

Actions Bar

**ACTIONS**
- Edit
- Export to Excel
- Acknowledge
- View PDF

**View**
- About This Record
- Columns: Please select and deselect the columns you would like to have present in your menu
- Freeze
- Detach
- Sort
- Reorder Columns
- Query by Example

**Format**
- Resize
- Wrap

UNFPA Quantum Supplier Portal Guide
3. How to tailor your menu: Actions Bar - adding 3 essential columns (continued)

The essential columns to include are:

- **Change Order** - indicates any unapproved change order and the sequence, you can click on the change order to see the initiator and take action.

- **Change Order Status** - indicates if change order is pending supplier acknowledgement, incomplete (a change order that has not been submitted for approval of UNFPA Procurement Authority).

- **Acknowledgement Due Date** - indicates the due date of when PO needs to be acknowledged and accepted by Supplier.
3. How to tailor your menu: Actions Bar - adding 3 essential columns (continued)

| Order   | Order Date   | Description          | Supplier Site | Buyer         | Ordered | Currency | Status   | Life Cycle | Change Order | Creation Date | Acknowledgement | Change Order |
|---------|--------------|----------------------|               |               |         |          |         |           |             |               |                |              |
| 70039110 | 22/01/2024   |                      | NLD           | GORTZ-BEHR... | 1.00    | USD      | Pending  | Su...      |              | 22/01/2024     | 24/01/2024     |              |
| 70039110 | 19/01/2024   | supplier portal test | NLD           | WANAJUK, T... | 10.00   | USD      | Open     |            | 16/01/2024    | 16/01/2024     |                |
| 70039117 | 19/01/2024   | TEST                 | NLD           | Subbaya, Sara| 0.00    | USD      | Open     |            | 16/01/2024    | 16/01/2024     |                |
| 70039118 | 19/01/2024   | TEST                 | NLD           | GORTZ-BEHR... | 0.00    | USD      | Open     |            | 16/01/2024    | 16/01/2024     |                |
| 70039119 | 18/01/2024   |                      | NLD           | Shah, Sikander | 1.00   | USD      | Open     | 1          | 18/01/2024    | Pending Supplier |                |
| 70039120 | 17/01/2024   |                      | NLD           | Chandiaule, Nain | 1.00 | USD      | Open     | 1          | 17/01/2024    |                |
| 70039120 | 21/12/2023   |                      | NLD           | WANAJUK, T... | 10.00   | USD      | Open     |            | 21/12/2023    |                |
| 70039120 | 10/12/2023   |                      | NLD           | Shah, Sikander | 1.00   | USD      | Open     |            | 10/12/2023    |                |
| 70039120 | 10/12/2023   |                      | NLD           | Shah, Sikander | 1.00   | USD      | Open     |            | 10/12/2023    | Incomplete     |

- This PO is pending supplier acknowledgment and the Due date is 24/01/2024
- This PO has a change order that is pending supplier acknowledgment
- This PO has a change order that is incomplete
- This PO is in its first change order sequence
3. How to find POs Pending Acknowledgment

2. For POs 70039245 and 70039242 with status “Open” and Change Order Status “Pending Supplier Acknowledgment” there is a Change Order created which needs to be accepted by Supplier (blue dot = Change Order).

For PO 70039243 with status “Pending Supplier Acknowledgment”: This is a “fresh” PO created by UNFPA. The PO needs to be accepted by the Supplier by 05/Apr/2024 (please refer to column “Acknowledge Due Date”).

Tp: if you are unable to see the above stated columns, please go to View/Columns to tailor your menu.

1. On the Main Navigation page go to “Required Attention” and click on the hyperlink.
3. How to Acknowledge (and Accept/Reject) a PO

Manage Orders

Search

- Sold-to Legal Entity
- Bill-to BU
- Supplier Site

Search Results

- Order
- Order Date
- Description
- Supplier Site
- Supplier Contact
- Buyer
- Ordered
- Currency
- Status
- Life Cycle
- Change Order
- Change Order Date
- Create Date

Actions:
- Acknowledge
- Export to Excel
- Edit
- View
- Format
- Freeze
- Detach
- Wrap

UNFPA Quantum Supplier Portal Guide
3. How to Acknowledge (and Accept/Reject) a PO (continued)

**Acknowledge Document (Purchase Order):** 70003505

**STEPS:**
1. Acknowledge Receipt of PO (refer to the previous slide)
2. Add “Acknowledgment Note”
3. Insert “Supplier Order” ID if applicable
4. Review PO details including attachments (Shipping Instructions, product artwork, etc.)
5. Accept / Reject PO. If rejected please provide detailed explanation
6. If required, you can also “Edit” PO after accepting it
3. How to Edit a PO

● Every time you initiate an amendment of a PO, Quantum will generate a **Change Order**.

● A Change Order is a **separate document** from the PO that outlines all the amendments or modifications to be applied to an existing PO.

● Quantum will assign a designated **numeric identifier** to the Change Order.

● When a Change Order is created by UNFPA, it prevents the Supplier from creating a new Change Order and vice versa.

● **The status “Incomplete”** indicates that the Change Order is in draft and has not been “submitted” by the creator for approval.

● The terms “**Initiating Party**, “**Initiator**, and “**Type**” specify who initiated this specific Change Order and will be saved by Quantum for auditing and historical tracking purposes.

● Changes introduced through a Change Order will be implemented into the PO **only after** approval from both parties.
3. How to Edit a PO (continued)

To initiate the revision of a PO:
- Mark the PO line and click on the editing pen to revise
- Go to Actions/Edit
3. How to Edit a PO (continued)

Click “Yes” to confirm creation of a Change Order

A Change Order is now created.

Click “Submit” when the revision of the PO is completed.

Enter a description of the changes. This information will be visible to UNFPA and saved in the “Document History”

The fields marked with an asterisk “*” are mandatory and will need to be filled

Please submit your Change Order to UNFPA as soon as possible, as an unsubmitted Change Order will prevent UNFPA from revising a PO
3. How to Edit a PO: fields editable by the supplier (continued)

<table>
<thead>
<tr>
<th>Description</th>
<th>Mandatory field on the header of the PO. The editor must provide a brief description of PO revision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>The supplier is able to revise the sequence of the planned delivery schedules</td>
</tr>
<tr>
<td>Split Shipments</td>
<td>The supplier is able to propose the split of the shipment</td>
</tr>
<tr>
<td>Promised Delivery Date (PDD)</td>
<td>Only applicable to “Services”</td>
</tr>
<tr>
<td>Promised Ship Date (PSD)</td>
<td>Only applicable to “Goods”</td>
</tr>
<tr>
<td>Change Reason</td>
<td>The field is activated on the line of the PO when the supplier begins the revision. The supplier may provide the reason for altering the order, e.g. “force majeure or reaching the limits of the production capacity or delayed by the manufacturing source, etc.</td>
</tr>
<tr>
<td>Discount Type</td>
<td>The supplier has the possibility to grant a discount for a product/service. Available discount types are: “Amount” and “Percent”</td>
</tr>
<tr>
<td>Discount</td>
<td>The field is activated, when the supplier selects the value against “Discount Type”</td>
</tr>
<tr>
<td>Discount Reason</td>
<td>The field is activated, when the supplier selects the value against “Discount Type”</td>
</tr>
<tr>
<td>Supplier Order Line</td>
<td>Supplier identifier for the PO line</td>
</tr>
<tr>
<td>Ordered</td>
<td>Only applicable to “Services”</td>
</tr>
</tbody>
</table>
3. How to Edit a PO: Promised Dates & Discount (continued)

- Insert the reason for editing your PO
- Adjust the Promised Ship Date, if required
- "Detach" to open PO lines in a separate window
- "Discount" and "Discount reason" fields are activated when "Discount Type" is selected
- Note. It is not allowed to change the Product Code unless the Product Code is covered by a BPA/LTA

BPA/LTA number and Agreement line number are visible
If splitting PO schedule into multiple schedules, then adjust:
- Qty
- Promised Ship Date (for goods) / Promised Requested Date (for services) (= Promised Due Date)

Any changes to a PO will create a Change Order that will require an approval by UNFPA Focal Point before it is implemented on the PO.
3. How to Delete an Unanticipated PO Change Order

If by coincidence, the user selects “Edit”, a pop-up window will appear warning that a Change Order for the Purchase Order will be created.

Click “No” to prevent the Change Order’s creation.
3. How to Delete an Unanticipated PO Change Order (continued)

If by accident, the user selects “Yes” - a Change Order will be automatically created preventing UNFPA to edit the PO.

You can delete the Change Order by following the below instructions:

1. Click on: “Actions” and “Delete”
2. In the pop-up window click “Yes”.

The Change Order is now deleted.
3. How to view PO PDF and History of a Purchase Order

To see the history of the order please go to “Actions”

To download the PO PDF, click on the download button labeled "download PO PDF".
3. How to view PO PDF and History of a Purchase Order (continued)
3. How to view Purchase Order Life Cycle

Purchase Order Life Cycle details:
- Order Number
- Supplier Name
- Supplier Site
- Supplier Contact
- Ordered Amount
- Received Amount (UNFPA created Receipt)
- Invoiced Amount (UNFPA created AP Invoice)
- In-Transit Shipments (ASN created by Supplier)
- Bar-Chart for PO transactions
3. PO Goods Process Flow

Upload PO documents (e.g., artwork) including SI, and FDR as required documentation when the freight is arranged by UNFPA.

PO created

PO approved

PO sent through Supplier Portal

PO acknowledged & accepted by Supplier within 3 working days

PO production phase

Supplier shares shipping documents by email as per shipping instructions

Green light given by UNFPA to Supplier

Supplier handover goods to UNFPA/Freight Forwarder

UNFPA notifies UNFPA Freight Forwarder by email, if applicable

If goods shipped with FF:

Shipping documents ready
Supplier creates ASN from the “Create ASN” tab and uploads the documents

UNFPA CFP receives auto notification about ASN creation

Supplier adjusts ASN from the “Manage Shipment” tab (only for C and D terms)

UNFPA CFP creates Financial Receipt as per Incoterm

Payment

UNFPA Freight Forwarder shares FCR based on the information provided by Supplier within 3 working days

Supplier documents including FCR ready, Supplier creates ASN from the “Create ASN” tab and uploads documents including FCR. The B/L/AWB are not required

UNFPA CFP receives auto notification about ASN creation

If required, Supplier can adjust the ASN from the “Manage Shipment” tab

UNFPA CFP creates Financial Receipt as per Incoterm

Payment

Note: The B/L and Shipping Documents cannot be adjusted. To revise that the Supplier will need to cancel and recreate the ASN.
3. UNFPA edits Goods PO

- **Action by UNFPA**
  - PO revised by UNFPA CFP
  - PO Change Order submitted by UNFPA through Supplier Portal
  - Supplier is notified about PO Change Order
  - Supplier reviews PO Change Order
  - PO Change Order approved or rejected?
    - Approved: Supplier approves PO Change Order
      - PO Change Order implemented against PO. UNFPA notified.
    - Rejected: Supplier rejects PO Change Order
      - PO Change Order cancelled. UNFPA notified.

- **Action by Supplier**

- **Action by FF**

- **PO Change Order approved (depending on the type of change)**
3. Supplier edits Goods PO

**Action by UNFPA**

**Action by Supplier**

**Action by FF**

- PO revised by Supplier
- PO Change Order submitted by Supplier through Supplier Portal
- UNFPA is notified about PO Change Order
- UNFPA reviews PO Change Order

**PO Change Order approved or rejected?**

- Approved:
  - UNFPA approves PO Change Order
  - PO Change Order implemented against PO. Supplier notified.
- Rejected:
  - UNFPA rejects PO Change Order
  - PO Change Order cancelled. Supplier notified.
3. PO PSI: Process Flow

- **Action by UNFPA**
- **Action by Supplier**
- **Action by PSI Agency**

- PSI PO created
- PSI PO approved
- PSI PO sent through Supplier Portal
- PSI PO acknowledged and accepted by PSI Agency
- PSI Agency informs Supplier per email
- Goods PO production phase
- Goods produced and ready for PSI
- Supplier requests PSI and shares shopping documents with PSI Agency
- PSI Agency performs PSI
- PSI Agency shares PSI Report
- No discrepancies pending
  (Green light given by UNFPA to Supplier)
- PSI Agency shares Invoice
- UNFPA CFP creates Financial Receipt
- Payment

PSI PO and the uploaded documents shared with recipients
3. PO PSI revised by PSI Agency: Process Flow

- Action by UNFPA
- Action by Supplier
- Action by PSI Agency

PSI PO revised by PSI Agency

PSI PO Change Order submitted by PSI Agency

UNFPA CFP is notified about PSI PO Change Order

UNFPA CFP reviews PSI PO Change Order

PSI PO Change Order approved or rejected?

- approved
- rejected

UNFPA approves PSI PO Change Order

PSI PO Change Order implemented against PSI PO. Supplier notified.

UNFPA rejects PSI PO Change Order

PSI PO Change Order cancelled. Supplier notified.
3. PO PSI revised by UNFPA: Process Flow

- Action by UNFPA
- Action by Supplier
- Action by PSI Agency

PSI PO revised by UNFPA CFP

PSI PO Change Order submitted by UNFPA through Supplier Portal

PSI Agency is notified about PSI PO Change Order

PSI Agency reviews PO Change Order

- approved
- rejected

PSI PO Change Order approved or rejected?

PSI Agency approves PSI PO Change Order

PSI PO Change Order implemented against PO. UNFPA notified.

PSI Agency rejects PSI PO Change Order

PSI PO Change Order cancelled. UNFPA notified.
3. PO Freight: Process Flow

- Freight PO created
- Freight PO approved
- Freight PO sent through Supplier Portal
- Freight PO acknowledged and accepted by Freight Forwarder
- Authorization to Ship issued by CFP to LFP
- Green Light to Ship issued by LFP to FF
- Supplier and Freight Forwarder making handover arrangements
- Freight Forwarder shares FCR based on the information provided by Supplier within 3 working days
- Please refer to the process flow prepared by the LSU

Supplier documents shared per email
3. PO Freight revised by Freight Forwarder

- **Action by UNFPA**
- **Action by Supplier**
- **Action by FF**
3. PO Freight revised by UNFPA

- Action by UNFPA
- Action by Supplier
- Action by FF

Freight PO revised by UNFPA

 Freight PO Change Order submitted by UNFPA through Supplier Portal

Freight Forwarder is notified about Freight PO Change Order

Freight Forwarder reviews PO Change Order

Freight PO Change Order approved or rejected?

- approved
  - Freight Forwarder approves Freight PO Change Order
    - Freight PO Change Order implemented against Freight PO. UNFPA notified.
  - Freight Forwarder rejects Freight PO Change Order
    - Freight PO Change Order cancelled. UNFPA notified.

- rejected

Freight PO Change Order approved (depending on the type of change)
4. AGREEMENTS
This chapter is applicable only to “Spend Authorized” suppliers who have active agreements with UNFPA.

It provides an overview on how to view agreement information in the Supplier Portal.

**IMPORTANT**
Agreements shall not be revised by the supplier until further notice. Any revisions initiated by the supplier will be rejected and canceled by UNFPA.

This section can be found under the “Tasks” segment of the Supplier Portal page.
4. Access Agreements from Main Navigation Page

**Definitions**

**Agreement Statuses:**

“Open”: The Agreement is active and open for sourcing.

“Canceled”: The Agreement is cancelled and no longer valid.

“On Hold”: The Agreement is temporarily suspended or put on hold for some reason.

“Freeze”: The Agreement is frozen and prevented from any further changes being made. Note that the status of the agreement will remain “Open”.

“Finally Closed”: The Agreement is no longer active or open for further processing.
4. Agreement Types

Type 1: Blanket Purchase Agreement (abbreviated as BPA and equivalent to LTA)

BPAs are added to Quantum based on specified and itemized products and services.

Type 2: Contract Purchase Agreement (abbreviated as CPA)

CPAs added to Quantum as a result of the piggybacking process and based on the signed Memorandum of Agreements with unspecified products and services.
4. Agreement Numbering

Format: **UNFPA-BU-AGMT-1xxxx**

Agreement numbers are assigned by Quantum automatically. The numbering convention is a combination of the following elements:

- **Legal Entity Identifier**: UNFPA
- **Business Unit Identifier**: HQ, AFG, MOZ, etc.
- **Agreement abbreviation**: AGMT
- **A five-digit sequential number** starting with 1: 10000.

Both BPAs and CPAs will share the same numbering system across the modules and Business Units.

For example: if UNFPA-HQ is creating a BPA with the following number: **UNFPA-HQ-AGMT-10001**, the subsequent BPA added to Quantum under UNFPA-AFG will inherit the number: **UNFPA-AFG-AGMT-10002**.
4. Detailed Search of Agreements

When search by status, you may include closed and expired agreements in your Search, select “Yes” in the field “Include Closed and Expired Documents”.

Select “UNFPA-HQ” to view your Agreement with UNFPA SCMU.

Search by specific agreement number.

Search by Agreement Header or Line details.

Search by status of agreement as per previous page.
4. How to tailor your menu: Actions Bar

Please do NOT use the “Edit” action type until further notice. If you accidentally initiated a revision of the agreement, please follow instructions on the next page.

- **Actions Bar**
  - Click on the hyperlinked number to open and view Agreement
  - Click on the paper clip logo to view attachments
  - “View”/“Columns” allows user to customize the visibility of the agreement information on “Manage Agreement” page

- **Actions**
  - Edit
  - Export to Excel
  - Acknowledge
  - View PDF

- **View**
  - About This Record
  - Columns
  - Freeze
  - Detach
  - Sort
  - Reorder Columns
  - Query by Example

- **Format**
  - Freeze
  - Detach
  - Wrap
4. Agreements: Please do not edit!

- Amendment of an agreement occurs through a **Change Order**
- Supplier *can* create an amendment to an agreement by mistake
- Please **refrain from editing agreements** during Phase I
- All Change Orders created by Suppliers will be deleted by UNFPA

- A Change Order is a **separate document** from Agreement that will have a designated numeric identifier assigned by Quantum and outlines all the amendments or modifications to be applied to an existing Agreement.

- **The status “Incomplete”** indicates that the Change Order is in the draft and has not been “submitted” by UNFPA for approval.

- Please contact your agreement contact point at UNFPA to request revisions to your agreement. Thank you.
4. How to Delete an Unanticipated Agreement Change Order

If by coincidence, the user selects “Edit”, a pop-up window will appear warning that a Change Order for the agreement will be created. Click “No” to prevent the Change Order’s creation.
4. How to Delete an Unanticipated Agreement Change Order (continued)

If by accident, the user selects “Yes” - a Change Order will be automatically created preventing UNFPA to edit the agreement. Please immediately delete the Change Order by following the below instructions:

Click on “Actions”/“Delete”/“Yes” to delete the Change Order.

Warning: This action will create a change order on the document. Do you want to continue? (PO:2055113)

Warning: The selected change order will be permanently deleted. This action can't be undone. Do you want to continue? (PO:2055218)
Any Agreement Change Order initiated by the supplier will be deleted by UNFPA Category Manager. Please contact your agreement contact point at UNFPA to request revisions to your agreement.

Thank you.
### 4. Header of Agreement

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement Amount</td>
<td>The agreed estimated purchasing budget, if applicable.</td>
</tr>
<tr>
<td>Minimum Release Amount</td>
<td>The minimum amount that can be released against the agreement.</td>
</tr>
<tr>
<td>Released Amount</td>
<td>The aggregated amount purchased by UNFPA under the agreement.</td>
</tr>
</tbody>
</table>

**Definitions**

- **Agreement Amount**: The agreed estimated purchasing budget, if applicable.
- **Minimum Release Amount**: The minimum amount that can be released against the agreement.
- **Released Amount**: The aggregated amount purchased by UNFPA under the agreement.

To review any hidden field information, mouse hover over the field.
### 4. Lines of Blanket Purchase Agreement

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Description</th>
<th>Category Name</th>
<th>UOM</th>
<th>Price</th>
<th>Released Amount</th>
<th>Expiration Date</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000720</td>
<td>Lamivudine 300mg + Tenofovir Disoproxil Fumarate 300mg Tablets</td>
<td>Dolutegravir/Abacavir/Lamivudine</td>
<td>Pack of 30</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1000519</td>
<td>Lamivudine 30mg + Zidovudine 80mg Tablets</td>
<td>Dolutegravir/Abacavir/Lamivudine</td>
<td>Pack of 60</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1000354</td>
<td>Amniocentesis hooks</td>
<td>Amniocentesis hooks</td>
<td>Pack of 1</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1000821</td>
<td>Amoxicillin trihydrate 250mg capsule</td>
<td>Amoxicillin trihydrate</td>
<td>Pack of 1000</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1000559</td>
<td>Amoxicillin trihydrate 500mg capsule</td>
<td>Amoxicillin trihydrate</td>
<td>Pack of 1000</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1000635</td>
<td>Amoxicillin, powder, oral suspension, 125mg/5ml, 100 ml bottle</td>
<td>Amoxicillin</td>
<td>Bottle</td>
<td>0.00</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note that lines are only created for Blanket Purchase Agreements.**

**Click on the icon to see more details on item (next slide).**
### 4. Lines of Agreement (continued)

To see detailed line information, click on the logo to open Item Page. On the item page you will view the BPA information as volume discounts, MoQ, shelf life, shipping information, Country of registration, etc.

Click on “Next” to view the detailed information of the next item or “Back” to go to the previous item.

Do not use “Actions”.

Click on “Done” to close the Item Page.

#### UNFPA Quantum Supplier Portal Guide
## 4. History of Agreement

### Blanket Purchase Agreement: UNFPA-HQ-AGMT-10019

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement BU</td>
<td>UNFPA-HQ</td>
</tr>
<tr>
<td>Agreement</td>
<td>UNFPA-HQ-AGMT-10019</td>
</tr>
<tr>
<td>Status</td>
<td>Open</td>
</tr>
<tr>
<td>Buyer</td>
<td>Luis Roberto MENA</td>
</tr>
<tr>
<td>Creation Date</td>
<td>11-Jul-2022</td>
</tr>
</tbody>
</table>

To see the history of the agreement please go to “Actions”.

- View Document History
- View Change History
- View Revision History

Click on “Done” to close the window.
4. History of Agreement - “Document History” (continued)

**Document History: UNFPA-HQ-AGMT-10205**

- **Buyer:** Natalia GIORTZ-BEHRENS
- **Agreement:** UNFPA-HQ-AGMT-10205
- **Description:** Procurement of male condoms. TEST NGB

<table>
<thead>
<tr>
<th>Action</th>
<th>Performed By</th>
<th>Action Date</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order 2</td>
<td>Natalia GIORTZ-BEHRENS</td>
<td>12-Dec-2022 09:00:09</td>
<td>test</td>
</tr>
<tr>
<td>Implement Revision 1</td>
<td></td>
<td>12-Dec-2022 09:03:47</td>
<td>test</td>
</tr>
<tr>
<td>Communicate</td>
<td></td>
<td>12-Dec-2022 09:04:38</td>
<td>Email: <a href="mailto:ngbtest22@gmail.com">ngbtest22@gmail.com</a></td>
</tr>
<tr>
<td>Change Order 1</td>
<td>Thinlay Wangchuk</td>
<td>18-Oct-2022 05:21:32</td>
<td>test 2</td>
</tr>
<tr>
<td>Original Document</td>
<td>Natalia GIORTZ-BEHRENS</td>
<td>18-Oct-2022 05:05:07</td>
<td></td>
</tr>
</tbody>
</table>

“Document History” refers to a chronological record of all activities related to the agreement, including when it was created, who approved it, and any other actions taken, such as viewing, printing, or downloading the document.

Document history provides a comprehensive log of document-related activities without specific details about changes or revisions to the content.
4. History of Agreement - “Change History” (continued)

“Change History” specifically tracks modifications made to agreements. This is particularly useful for understanding how the document’s content has evolved over time, including edits, additions, or deletions.

Click on the hyperlink to obtain more details.
"Revision History" is closely related to change history but focuses on versions or revisions of the document.

It helps to track the document's evolution for auditing purposes.

---

### Revision History: UNFPA-HQ-AGMT-10205

<table>
<thead>
<tr>
<th>Revision</th>
<th>Change Order</th>
<th>Description</th>
<th>Creation Date</th>
<th>Initiating Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>test</td>
<td>12-Dec-2022</td>
<td>Buyer</td>
</tr>
<tr>
<td>0</td>
<td></td>
<td>Procurement of male condoms. TEST NGB</td>
<td>18-Oct-2022</td>
<td>Buyer</td>
</tr>
</tbody>
</table>

Click on the hyperlink to obtain more details.
Please note that product pictures and vendor-specific technical specifications are maintained outside of Quantum.

UNFPA is in the process of developing a new External Catalog to handle this information.
5. SHIPMENTS
5. Advance Shipping Notice (ASN)

- This chapter is applicable only for the “Spend Authorized” suppliers who have active Agreements with UNFPA.
- It provides an overview on how to create, view and edit ASNs in the Supplier Portal.
- **ASN is only applicable to POs for goods** and will not show the lines related to services i.e. freight services, PSI, packaging services, etc.

**IMPORTANT**

- The ASN shall be created by Supplier after green light to ship the goods is granted by UNFPA and final set of shipping documents is approved by the consignee.
- The ASN is created on the date of the shipment pick up by the freight forwarder. However, the Supplier can backdate the date of the shipment. It is not possible to insert future dates.
- When the ASN is submitted, the date or uploaded shipping documents **cannot be revised**. To correct or update the ASN information, the ASN has to be canceled using Manage Shipment tab.

Enter the shipment information with “Create ASN” tab
5. Advance Shipping Notice (ASN) (continued)

1. Enter PO number and click “Search”

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Description</th>
<th>Supplier Item</th>
<th>Manufacturer</th>
<th>Purchase Order</th>
<th>Purchase Order Line</th>
<th>Purchase Order Schedule</th>
<th>Due Date</th>
<th>Ordered Quantity</th>
<th>UOM Name</th>
<th>Received Quantity</th>
<th>Ship-to Location</th>
<th>Organization</th>
<th>Sold-to Legal Entity</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000746</td>
<td>Tube, suction, C...</td>
<td></td>
<td>N.</td>
<td>70006937</td>
<td>1</td>
<td>1</td>
<td>01/12/2023</td>
<td>50 Each</td>
<td></td>
<td>0</td>
<td>MINISTRY OF F...</td>
<td>Unibud Nations...</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>1000746</td>
<td>Tube, suction, C...</td>
<td></td>
<td>N.</td>
<td>70006937</td>
<td>1</td>
<td>2</td>
<td>01/11/2023</td>
<td>50 Each</td>
<td></td>
<td>0</td>
<td>MINISTRY OF F...</td>
<td>Unibud Nations...</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

2. Select lines you are creating ASN for and click on “Create ASN”
5. Advance Shipping Notice (ASN) (continued)

- Enter “Shipment number” which is a unique number assigned by the Freight forwarder
- Enter the “Shipped date”, which can only be today’s date or a past date (system will not accept a future date). Please review next slide for more information

- Enter the Incoterm and Shipping method
- Enter the BOL or AWB number only for POs where the supplier also manages the freight services

Upload shipping documents under attachment by clicking on “+” (the instructions are provided in the following slides)

Enter quantity that is going to be shipped
5. ASN Dates Definition: Shipped Date

Definitions

**Shipped date** should be interpreted as the Actual Time of Departure (ATD) or Estimated Time Arrival (ETA) depending on the agreed Incoterm:

When freight is not arranged by the supplier:

- **E-terms:** ATD = when goods are made available for pick-up at supplier’s premises = goods ready for pick up
- **F-terms:** ATD = when goods are loaded on vessel/carrier or made available at supplier’s premises = goods ready for pick up (or the pick up place is agreed in the BPA)

When freight is arranged by the supplier:

- **C-terms:** ATD = when goods are loaded on vessel/carrier or made available at supplier’s premises (or the pick up place is agreed in the BPA)
- **D-terms:** ETA = when the goods are delivered at a named place of destination
5. Adding PO Lines to Shipment

Under 'Search results,' navigate to the left to find the cursor and drag down to mark as many PO lines as required according to your PO shipping schedule.

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Description</th>
<th>Supplier Item</th>
<th>Purchase Order</th>
<th>Purchase Order Line</th>
<th>Purchase Order Schedule</th>
<th>Due Date</th>
<th>Ordered Quantity</th>
<th>UOM Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000735</td>
<td>Mifepristone 20...</td>
<td></td>
<td>70039240</td>
<td>1</td>
<td>1</td>
<td>15/07/2023</td>
<td>4</td>
<td>Pack of 5</td>
</tr>
<tr>
<td>1000615</td>
<td>Tube, suction, Y...</td>
<td></td>
<td>70039240</td>
<td>2</td>
<td>1</td>
<td>10/06/2024</td>
<td>4</td>
<td>Each</td>
</tr>
</tbody>
</table>
5. ASN and Shipping Documents

Enter shipping documents under the attachment, the documents can be added as bundle (zip-folder) or separately. If documents are attached separately please enter the title for each document e.g. Invoice, Packing List, COO etc.

Only when all the required information is added incl. final set of shipping documents, you can click on “Submit” the ASN by clicking at the top-right corner.

Now the ASN cannot be edited.

Once the documents are attached, Click “OK” to come back to the main page.
Quantum will create an automatic confirmation message that ASN was created. Click “OK”.

The UNFPA Buyer will be automatically notified about the ASN creation on their Quantum notification workbench.
## 5. ASN Field Definitions

<table>
<thead>
<tr>
<th>ASN Fields</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shipment Number</strong></td>
<td>A unique number assigned by the freight forwarder and shared with the supplier before shipping the goods optionally if shipment number is not available supplier can insert PO number starting with S-xxxxx (in case more than one shipment is schedule against same PO, the shipment lot should be indicated e.g. 1/3, 2/3, 3/3).</td>
</tr>
<tr>
<td><strong>Shipped Date</strong></td>
<td>The “Shipped date” should be interpreted as the ATD or ETA, depending on the agreed Incoterm and which party is arranging the freight services: supplier or freight forwarder</td>
</tr>
<tr>
<td><strong>Expected Receipt Date</strong></td>
<td>This date is only relevant for suppliers who manage freight services directly. It represents the date when the item is expected to arrive at the agreed Place of Destination known as Estimated Time of Arrival (ETA). It can be amended via the “Manage Shipments” section</td>
</tr>
<tr>
<td><strong>Freight Terms / Shipping method</strong></td>
<td>It should be added as agreed upon in the Purchase Order</td>
</tr>
<tr>
<td><strong>BOL / WAYBILL number</strong></td>
<td>It should be added if these documents/numbers are available for the supplier</td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>This field is mandatory under the shipped quantity section</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Suppliers can use this field to share any relevant comments about the shipment</td>
</tr>
<tr>
<td><strong>Attachments</strong></td>
<td>This refers to the final version of the shipping documents, which must be approved by CFP and the consignee.</td>
</tr>
</tbody>
</table>
5. ASN Key information

➔ The ASN can only be created by the suppliers for the PO line type “Goods”.
➔ The ASN cannot be created for PO line type “Services” (e.g. Freight services or PSI services).
➔ The ASN is created on the date of the shipment pick up = handover to the first carrier. After UNFPA CFP has granted the supplier green light for shipment and consignee has approved shipping documents.
➔ The Supplier can backdate the ASN date. It is not possible to create ASN with the future dates.
➔ When the ASN is submitted, to correct or update the ASN information, the ASN has to be canceled using Manage Shipment tab.
➔ UNFPA CFP will be notified about the ASN submission via automatically generated system notification.
➔ The ASN information and attachment with Shipping documents will be visible in REQ Lifecycle for Requisitioners, PO lifecycle for CFP and in My Receipts for Receivers.
➔ The shipment number will be the PO number starting with the letter S e.g. S70006936 and if the shipment is splitted into multiple shipments the supplier will add the shipment number as follow e.g S70006936 1/3
This chapter is applicable only for the “Spend Authorized” suppliers who have active Agreements with UNFPA.

It provides an overview on how to view and edit Shipments in the Supplier Portal.

This section can be found under the **Tasks** segment of the Supplier Portal page.

Manage shipment allows for review of the ASN information, small modifications to ASN and for the **cancellation of ASN**.

Enter the shipment information into “Manage shipments” section.
5. Manage Shipments (continued)

To Edit or review information click on the shipment hyperlink

Enter the Shipment number or PO number and click “Search”

<table>
<thead>
<tr>
<th>Shipment Number</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>S7006937 1/2</td>
<td>UNFPATEST2023</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplier Organization</th>
<th>Expected Receipt Date</th>
<th>Shipped Date</th>
<th>Ship to Location</th>
<th>Waybill</th>
<th>Bill of Lading</th>
<th>Shipping Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>28/09/2023 06:34</td>
<td>18/09/2023 06:13</td>
<td></td>
<td></td>
<td></td>
<td>Ocean</td>
</tr>
</tbody>
</table>

---

Click to return to TOC
5. Manage Shipments Amendment and Cancellation

To change quantity or add/change document attachments, the Shipment Line or entire Shipment will need be cancelled, and a new ASN must be created.
To cancel the entire shipment click on “Cancel Shipment” on the main page of the Manage shipment tab.

Kindly note that when you recreate the ASN for the new Shipment Identifier, you will need to add rev. X number. E.g. S70006936 ⅓ rev1
5. Shipments Dates Definition: Expected Receipt Date

Note: this is only relevant to suppliers who manage freight services directly!

**Definitions**

*Expected Receipt date:* This is the date when the item is expected to arrive at the agreed Place of Destination, also known as Estimated Time of Arrival (ETA).

- **The date is defaulted by Quantum** when the ASN is created.
- Suppliers can adjust the date only when reopening the ASN from “Manage Shipments”.
- The date is visible with the REQ and PO lifecycle.
- For suppliers who provide the **goods on EXW or FCA terms** without arranging the freight, this date will be automatically populated from ASN and should equal the “Shipped Date” entered in the ASN.
- For suppliers who provide the **goods on C & D - terms** and arrange the freight, this date will be automatically populated from ASN and should be amended via Manage Shipment section to reflect Estimated Time of Arrival (ETA).
5. Manage Shipments Key Information

➔ **Cancellations of ASN:** The supplier can cancel the entire ASN or the ASN lines using cancellation option in the Manage shipment section.

➔ **Viewing Shipment Details:** The shipments information created via the ASN can be accessed via Manage shipment tab. This includes details such as shipment dates, tracking numbers, BOL/AWB information, and quantity and the items included in each shipment schedule.

➔ **Shipping Documentation:** The attachment with shipping documents earlier uploaded via ASN are not visible in this section hence any amendments to the shipping docs will need to be introduced via new ASN creation.

➔ **Communication:** Suppliers can use the comments section to communicate with UNFPA buyers regarding shipment issues, delays, or other concerns.

➔ **Delivery Scheduling:** Suppliers can adjust Expected Receipt date (ETA depending on the incoterm that is chosen for this shipment).
6. RECEIPTS, INVOICE AND PAYMENTS
This chapter is applicable only for the “Spend Authorized” suppliers who have active Agreements with UNFPA.

It provides an overview on how to Create Invoice(s), view Purchase Orders, Invoices, Payments and Remittances in the Supplier Portal.

These sections can be found under the Tasks segment of the Supplier Portal page.

1. **View Receipts (Phase I)**
2. **Create Invoice (Phase III)**
3. **Create Invoice without PO (NA)**
4. **View Invoices (Phase I)**
5. **View Payments (Phase I)**
Navigate the Tasks on the Supplier Portal page and follow the steps below:

1. Click “View Receipts”
2. Choose 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 details (Header and Lines)
7. Click “View Transaction History”
6. View Receipts

Enter PO number to find specific PO Receipt or Receipt date to find POs receipt issued within specific time frame

To get more information click on the hyperlink for the specific Receipt line
6. View Receipts

The Receipt date for services equals the date when services are considered as ‘delivered’ to UNFPA upon verification that the services were of acceptable quality and in conformity with the service contracts.

The Receipt date for goods equals the date when the ownership of the goods is transferred to UNFPA which is determined by the Incoterm agreed on the PO.

The Receipt date does not equal payment date. The payment is scheduled based on the Net 30 day payment period calculated from the Receipt date.
6. View Invoices

1. Click “View Invoices” on the supplier portal main page
2. Use any of the following search options to retrieve the existing 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
6. View Payments

1. Click “View Payments” on the supplier portal main page
2. Use any of the following search options to retrieve the existing 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
7. COMPANY PROFILE
This chapter describes some additional Quantum Supplier Portal features that enable the users to view and edit their Company Profile.
7. Key Information

- All Quantum UN Agencies are sharing the same supplier database (mergers pending)

- Changes proposed by Supplier can be processed by any UN Agency associated with the supplier

- Company’s profile information shall be kept up to date

- Please do not change your company name

- Supporting documents might be requested

- Please ensure all fields marked with * are completed.
7. Key Information

- Generic User Accounts are strongly discouraged to enable visibility and transparency of revisions

- Tab “Address”.
  - For the supplier profile to be visible for Site creation while being promoted to the Spend Authorized status, the Site Purposes "Ordering", "Remit to", “RFQ or Bidding” must be ticked.

- Tab “Bank Account” is for review only. Please contact your focal point at UNFPA for any revisions

- Tab “Products and Services”: Please select applicable to enable future invitations to bid
7. How to Edit Company Profile

Click "Edit" to proceed with editing the company profile. A warning message will appear, stating that making edits will create a change request for the profile. You will be asked if you want to continue. Click "Yes" if you wish to proceed or "No" to cancel the changes.
7. Edit Sections

Click on each section to edit respective fields of the company profile

Add which changes are requested to be implemented in this field

Please note that all information fields marked with an asterisk "*" are mandatory to complete
### 7. Edit Organization Details

#### General

- **Supplier Name**: Supplier
- **Supplier Number**: 1071530
- **Supplier Type**: Supplier

#### Identification

- **D-U-N-S Number**
- **Customer Number**
- **SIC**

#### Corporate Profile

- **Year Established**: 1990
- **Mission Statement**
- **Year Incorporated**

#### Financial Profile

- **Fiscal Year End Month**
- **Current Fiscal Year’s Potential Revenue**
- **Preferred Functional Currency**

---

**Do not edit “Supplier Name”, “Supplier Type” or “Tax Organization Type”**

**Leave “Identification” blank, if not applicable**

**Attach supporting documents**

**“Corporate Profile” and “Financial Profile” are optional to complete**
7. Edit Tax Identifiers

For any changes on this tab, please provide supporting documentation by uploading documents under tab “Organization Details”
7. Edit Addresses

Click on Address Name to update the address

Click on “+” to add new address

For any changes on this tab, please provide supporting documentation by uploading documents under tab “Organization Details”

For the supplier profile to be visible for Site creation while being promoted to the Spend Authorized status, the Site Purposes "Ordering" and "Remit to" must be ticked.

Tick off the “RFQ or Bidding” as well
7. Add New User Account and Roles

1. Click “Contacts” on the supplier portal main page
2. Click on “+”
7. Add New User Account and Roles (continued)

1. Please ensure all fields marked with * are completed.
2. Email address must be filled in.
3. If the new contact will be granted as Administrative contact role, click on the checkbox of “Administrative contact”
4. Click on the checkbox of “Request user account”
5. Click on “OK”
6. Generic User Accounts are strongly discouraged to enable visibility and transparency of revisions
There are two user types: **Administrative Contact and User Account**.

- The Administrator user role: enables addition, inactivation and reactivation of other users within your organization.

- User Account provides access to view and collaborate on different sections, e.g. purchase order.

- Multiple individuals can be set up with these profiles as required.
### 7. Add New User Account and Roles (continued)

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UN Supplier Sales Representative</strong></td>
<td>Manages agreements and deliverables for the supplier company.</td>
</tr>
<tr>
<td><strong>UN Supplier Customer Service Representative</strong></td>
<td>Manages inbound purchase orders and communicates shipment activities for the supplier company.</td>
</tr>
<tr>
<td><strong>Supplier Self Service Administrator</strong></td>
<td>Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.</td>
</tr>
<tr>
<td><strong>Supplier Accounts Receivable Specialist</strong></td>
<td>Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status</td>
</tr>
<tr>
<td><strong>Supplier Bidder</strong></td>
<td>Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information or any other types of solicitations</td>
</tr>
<tr>
<td>Role Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
</tbody>
</table>
7. Change User Account Status to Inactive

Click on Contact Name

Change Status “Inactive”

Account Status “Inactive”
7. Payments Methods - view only

Review only, for adding new bank account or updating bank account, please contact your focal point at Contracting Team.
7. Edit Business Classifications

<table>
<thead>
<tr>
<th>Classification</th>
<th>Subclassification</th>
<th>Status</th>
<th>Certifying Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISO Certifications</td>
<td></td>
<td>Current</td>
<td>ISO9001</td>
</tr>
<tr>
<td>Other Certifications</td>
<td></td>
<td>Current</td>
<td>CE</td>
</tr>
</tbody>
</table>

**Click on “+” to add new Certification**
Click on "+" to add new Category of products/services if applicable.
7. Review Changes and Submit for Approval

Step 1. Click on “Review Changes”

Note: The “Submit” icon will only be available after you click on “Review Changes”

---

**Organization Details**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Changed From</th>
<th>Changed To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Incorporated</td>
<td></td>
<td>2000</td>
</tr>
</tbody>
</table>

---

**Contacts**

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Email</th>
<th>Phone</th>
<th>Administrative Contact</th>
<th>User Account</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier2, Supplier2</td>
<td>test</td>
<td><a href="mailto:supplier2@unfpa.org">supplier2@unfpa.org</a></td>
<td></td>
<td></td>
<td></td>
<td>Inactive</td>
<td></td>
</tr>
<tr>
<td>Test, Supplier</td>
<td>Account manager</td>
<td><a href="mailto:supplier@test.com">supplier@test.com</a></td>
<td></td>
<td></td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

---

Step 2. Once you have reviewed the changes that were applied and no further updates are required, select “Submit”
7. Review Changes and Submit for Approval (continued)

A Confirmation that the Change Request was submitted for approval and a Change Request number was created. Click on “OK”
7. Approval of Change Request

From: NoReply@UN.org <estm.fa.sender@workflow.mail.em2.cloud.oracle.com>
Sent: Tuesday, 12 March 2024 15:43
To: Supplier2 <supplier2@unfpa.org>
Subject: FYI: Supplier Profile Change Request 1447293 was Approved by United Nations

A email notification will be received when the Change Request is approved.

CAUTION: Message from External Sender. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Supplier Profile Change Request 1447293 was Approved by United Nations

Details

<table>
<thead>
<tr>
<th>Assignee</th>
<th>Supplier2</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td></td>
</tr>
<tr>
<td>Assigned Date</td>
<td>12/03/2024 09:42</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>12/04/2024 10:42</td>
</tr>
<tr>
<td>Task Number</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request 1447293</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Date</td>
</tr>
<tr>
<td>Requested By</td>
</tr>
<tr>
<td>Change Description</td>
</tr>
</tbody>
</table>

Supplier2

Supplier Number

Action Details

Action: Approved
Action Date: 12/03/2024 09:42
7. Rejected or Request more information for Change Request

Supplier Profile Change Request 1447293 was Canceled by United Nations

Details

Assignee: Supplier2
From: estm фа. sender@workflow.mail.em2.cloud.oracle.com
Request: 1447293
Request Date: 12/03/2024
Requested By: Supplier2
Change Description: Add new user account

Action Details

Action: Canceled
Action Date: 04/03/2024 06:41
Canceled Reason: Please resubmit
Canceled By:

- Cancellations are automatic by the system, when there is an issue such as a duplicate bank account number, or some kind of a technical issue (such as the example in the slide)

- Rejections are done manually for a specific reason which should be listed in the notification.
8. USER PROFILE SETTINGS
8. Setting your profile preferences

The Portal gives the possibility each supplier to set the preferences of their own supplier profile.

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".
8. Setting your profile preferences - regional 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 all the dates incl. tender deadlines to the exact time as per your chosen setting.
8. Setting your profile preferences - language preferences

"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.
8. 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 process.

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".
To set your Regional preferences, click the option "Regional" where 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 all the dates incl. tender deadlines to the exact time as per your chosen setting.
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.
9. Frequently Asked Questions (FAQs)
9. Frequently Asked Questions (FAQs)

**How to login to activate my user account?**

**How to reset my password?**

**I have incorrectly inserted the password three times, and unable to login. What should I do?**

**I'm unable to recall my username. What should I do?**

**How can I customize my screen/menu by adding essential columns?**

**How can I see all the UNFPA POs or find a specific PO based on different attributes?**

**How can I find all the POs “Pending Acknowledgement” or pending Change Orders?**

**I did not receive email requesting to process PO, even UNFPA added my email with the Communication Method Email. What should I do?**

**Will UNFA share PO attachments including Shipping Instructions through the Supplier Portal, as well?**

**How can I delete an PO Change Order created by mistake?**

**How can I delete an Agreement Change Order created by mistake?**

**Can I create ASN for several PO lines?**

**Why am I unable to find UNFPA solicitations in the Supplier Portal?**
9. Log in to Supplier Portal: How to activate your user account

Welcome to UN Quantum, Supplier2 Supplier2

Step 1. Check your email box incl. spam folder

Activate Your Account

Step 2. Click on the hyperlink to access Quantum

Hello Supplier2 Supplier2,
Your UN Quantum account is ready. To get started, activate your account.

Activate your account

Details

If the activate your account link doesn’t work, please copy and paste the following URL into the address bar of your browser:


Important: This link will expire on Wednesday, October 4, 2023 10:32:28 AM EDT.

After activation of your account, click here to access the Quantum Supplier Portal

If you don’t recognize this message, please contact your respective UN Agency focal point.
9. Log in to Supplier Portal: How to activate your user account (continued)

- Click "Reset Password"
- Create your password
- Retype your password
- Confirm your new password
- Congratulations! Your password has been reset. Please login using your new password.

UNFPA Quantum Supplier Portal Guide
9. Log in to Supplier Portal: How to activate your user account (continued)

Password has been reset for your UNFPA Quantum account

Hello,

Your password for UNFPA Quantum account has been reset.

Details:

Important: If you don’t recognize this message or if you haven’t requested a password reset, contact your respective UN agency’s help point.

Supplier Contact User Account for United Nations was Created

Details:

Recommended Actions:

You were granted access to the supplier application for United Nations. A separate email will be sent to you with the instructions to access the application.

User Account Details:

Assigned Roles:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Administration</td>
<td>Manage invoices and payments for company, Primary correspondence, etc.</td>
</tr>
</tbody>
</table>

Supplier Accounts Receivable Specialist:

Click to return to TOC
9. Log in to Supplier Portal: How to activate your user account (continued)
9. Log in to Supplier Portal: How to activate your user account (continued)

1. Select Your Default Secure Verification Method
   You have already set up one or more recovery methods. We will use these same methods for Secure Verification.

2. What is Secure Verification?

3. Select Your Default Secure Verification Method
   You have already set up one or more recovery methods. We will use these same methods for Secure Verification.

4. An email that contains a verification code has been sent to
   Enter a verification code
   Resend code

UNFPA Quantum Supplier Portal Guide
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.
9. Unable to find Username

*I cannot remember my username.*

The username is your company email that was used at the time of user account creation.
9. 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.
9. 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.
9. 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.
9. Forgot Password (continued)

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

If you have incorrectly inserted the password three times, the system will prevent you from any further entries. Therefore, please try to reset your password again following the instructions above. Please follow the relevant link to Quantum Supplier Portal and click on “Need help signing in? Click Here”.

![Quantum Supplier Portal login page](image)
9. How to check the spam folder for the PO Pending Acknowledgement email

As per the slide titled “Main Navigation Page - scope of release”, the Solicitation/Negotiation module will be released by UNFPA in the next phase of the Supplier Portal.

For International Solicitation Processes, please follow UNGM.

Regular/BPA/LTA/low-value RFQs will continue be shared via email for now.
9. Why I am not able to find UNFPA solicitations in the Supplier Portal?

The Quantum notification emails may initially go to your spam and the subject will start with Document and include the PO number. It is important to select not Spam so future emails go directly to your inbox.

As all communications come from estm.fa.sender@workflow.mail.em2.cloud.oracle.com, it will be important to inform your IT service to whitelist this address.
10. Video Demonstrations

1. Supplier revises “Company Profile” Section

2. Basic Process Flow for Goods PO with no PO revisions
   Stages: PO created by UNFPA, PO reviewed and accepted by Supplier, ASN created, ASN adjusted and PO life cycle.

3. Supplier splits shipment after a 3-day window, including the application of a PO header discount

4. Force Majeure: Supplier unable to meet Promised Ship Date (after the 3-day PO confirmation window)

5. UNFPA delays dispatch of Goods

6. Supplier adjusts ASN
10. Demo: Supplier revises “Company Profile” Section

Duration 16:14
10. Demo: Basic Process Flow for Goods PO with no PO revisions
Stages: PO created by UNFPA, PO reviewed and accepted by Supplier, ASN created, ASN adjusted and PO life cycle

Duration: 23:06
10. Demo: Supplier splits shipment after a 3-day window, including the application of a PO header discount

Duration 18:59
10. Demo Force Majeure: Supplier unable to meet Promised Ship Date (after the 3-day PO confirmation window)

Duration 17:29
### 10. Demo: UNFPA delays dispatch of Goods

Duration 6:43

**UNFPA Quantum Supplier Portal Guide**
10. Demo: Supplier adjusts ASN

Duration 7:51
In case of any technical issues with the Supplier Portal, please submit your request to:

supplier-portal@unfpa.org

**Important**

To ensure your case is resolved as quickly as possible, when requesting the support, please share the following details:

- Your Supplier ID and Company name
- User Account email address
- Screenshots of any error or warning messages
- A brief description of the steps you took before encountering any errors or issues
for using Quantum Supplier Portal