Training Webinars:
Initiating supplier collaboration through Supplier Portal

03 - 04 April 2024
Introduction
# Agenda

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<th>Presenter</th>
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<td>Ms. Natalia Giortz-Behrens</td>
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<td>Ms. Natalia Giortz-Behrens</td>
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<td>Ms. Natalia Giortz-Behrens</td>
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<td>Closing Remarks</td>
<td>Ms. Natalia Giortz-Behrens</td>
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### 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><strong>Phase I</strong>&lt;br&gt;view-only</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.&lt;br&gt;Piloting collaboration (Phase II) with one BPA supplier.&lt;br&gt;Go-live date: <strong>November 20, 2023</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Phase II</strong>&lt;br&gt;ongoing</td>
<td>Initiating supplier collaboration on UNFPA <strong>Purchase Orders, Shipments and Company Profile</strong>.&lt;br&gt;Go-live date: <strong>April 08, 2024</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Phase III</strong>&lt;br&gt;pending</td>
<td>Initiating supplier collaboration on the remaining sections of the portal.&lt;br&gt;Approx. by <strong>2024/2025</strong></td>
<td></td>
</tr>
</tbody>
</table>
Benefits of using the SP for collaboration
Quantum sister agencies are:
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)

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.
Accessing and Navigating the Portal
User Accounts requested by the UNFPA SCMU SST through Supplier Contact Form are created.
Logging in to the Supplier Portal

- The Supplier Portal can be accessed through http://supplier.quantum.partneragencies.org/

- It is optimized with the latests versions of Microsoft Edge or Chrome browsers.

- Your **User ID** is the email address used when you requested access to the portal (previous slide).

- If you are logging into the portal for the first time, please select “Forgot Password” and follow the prompts to create your unique password.
User Profile Preferences
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".
"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.
"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.
Company Profile
● 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.
Company Profile

- 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" and “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
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.
Demo Scenario: Supplier revises Company Profile (duration 16:14)
Management of POs:
After 08 April 2024
<table>
<thead>
<tr>
<th>Action</th>
<th>Before</th>
<th>Going forward</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>

**Demo Videos** outlining the above Steps and **Supplier user guide FAQs** can be consulted for additional guidance.
### Important columns to add under Manage Orders

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Order</td>
<td>Lets you know of any unapproved change order and the initiator, you can click on the change order to take action</td>
</tr>
<tr>
<td>Change Order Status</td>
<td>Lets you know if the change order is pending supplier acknowledgement, incomplete (a change order that has not been submitted for approval) or pending approval.</td>
</tr>
<tr>
<td>Acknowledgement</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td>Lets you know the due date of any PO pending Supplier Acknowledgement</td>
</tr>
</tbody>
</table>
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.

Definitions

**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
## PO fields that can be edited by the supplier

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory field on the header of the PO. The editor must provide a brief description of PO revision</td>
<td></td>
</tr>
<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. <em>force majeure</em> or <em>reaching the limits of the production capacity</em> or <em>delayed by the manufacturing source</em>, 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>
PO and PO Change Orders for Goods: Process Diagram including Scenarios
PO Goods Process Flow

1. **PO created**
   - Action by UNFPA
   - Action by Supplier

2. **PO approved**
   - PO sent through Supplier Portal
   - PO acknowledged & accepted by Supplier within 3 working days

3. **PO production phase**
   - Supplier shares shipping documents by email as per shipping instructions
   - Green light given by UNFPA to Supplier

4. **Supplier handover goods to UNFPA Freight Forwarder**
   - UNFPA notifies UNFPA Freight Forwarder by email, if applicable

5. **Shipping documents ready**
   - Supplier creates ASN from the "Create ASN" tab and uploads the documents

6. **visibility with RFG and/or PO lifecycle**
   - 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 terms
   - Payment

7. **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 BUL/ANB are not required

8. **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 terms
   - Payment

9. **Note:** The Cty and Shipping Documents cannot be adjusted. To revise this, the Supplier will need to cancel and recreate the ASN.
• Every time you initiate an amendment of a PO, Quantum will creates 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, **“pending supplier acknowledgement”** indicates that the change order is pending the supplier’s approval, **“pending approval”** indicates that the change order is pending UNFPA’s buyer 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.
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 (depending on the type of change)

PO Change Order approved or rejected?

- Supplier approves PO Change Order
  - PO Change Order implemented against PO. UNFPA notified.
- Supplier rejects PO Change Order
  - PO Change Order cancelled. UNFPA notified.

Action by Supplier

Action by FF
Supplier edits PO

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

1. **PO revised by Supplier**
2. **PO Change Order submitted by Supplier through Supplier Portal**
3. **UNFPA is notified about PO Change Order**
4. **UNFPA reviews PO Change Order**
5. **PO Change Order approved or rejected?**
   - **UNFPA approves PO Change Order**
     - **PO Change Order implemented against PO. Supplier notified.**
   - **UNFPA rejects PO Change Order**
     - **PO Change Order cancelled. Supplier notified.**
Management of Shipments incl. Advance Shipping Notice
**Advance Shipping Notice (ASN)**

**Tasks**
- Manage Orders
- Manage Schedules
- Acknowledge Schedules in Sp
- Manage Agreements
- Manage Programs
- Manage Programs

**Shipment**
- Manage Shipments
- Create ASN
- Create ASN
- Upload ASN or ASBN
- View Receipts
- View Returns

**Contracts**
- Manage Deliverables

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

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**IMPORTANT**

- **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.
- **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.
- 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 PO Lifecycle under in-transit shipment.
# Shipment - ASN Definitions

<table>
<thead>
<tr>
<th>ASN Fields</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipment Number</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>Shipped Date</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>Expected Receipt Date</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>Freight Terms / Shipping method</td>
<td>It should be added as agreed upon in the Purchase Order</td>
</tr>
<tr>
<td>BOL / WAYBILL number</td>
<td>It should be added if these documents/numbers are available for the supplier</td>
</tr>
<tr>
<td>Quantity</td>
<td>This field is mandatory under the shipped quantity section</td>
</tr>
<tr>
<td>Comments</td>
<td>Suppliers can use this field to share any relevant comments about the shipment</td>
</tr>
<tr>
<td>Attachments</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>
Handling of FCR

The FCR is now required document to be included in the ASN and facilitates the payment process.

Handling of FCR:
The FF collects the goods or takes custody of the consignment at an agreed place (if other than the supplier’s premises), in line with the supplier’s BPA.

Responsibilities of FF:
The FF shares a Freight Forwarder’s Certificate of Receipt (FCR) with the Commodity Supplier and the SCMU Focal Points (CFP & LFP) within 3 working days from handover, filling information of the template regarding the transit and the route.

Responsibilities of Goods Supplier:
Provide to the Freight Forwarder address, cargo details (through the shipping documents) and product, so the FCR of the FF is correct and up to date. This will enable the Commodity supplier to upload a full set of payment documents via the Supplier Portal.
Shipments - Manage Shipment 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 access 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)
Demo Scenario 1: Purchasing Process Flow with no PO revisions
(duration: 23:06)
Demo Scenario 2: Split shipment by Supplier after a 3-day window including the application of a PO header discount (duration 18:59)
Demo Scenario 3: Force Majeure, Supplier delays (after 3-day window) (duration 17:29)
Demo Scenario 4: UNFPA delays dispatch of Goods (duration 6:43)
Demo Scenario 5: Supplier adjusts ASN (duration 7:51)
PO for PSI incl. testing services: Process Diagram and Scenarios
PO PSI: Process Flow

Action by UNFPA  Action by Supplier  Action by PSI Agency
PO PSI revised by PSI Agency: Process Flow

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

2. **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**

3. **UNFPA approves PSI PO Change Order**
   - **PSI PO Change Order implemented against PSI PO. Supplier notified.**

4. **UNFPA rejects PSI PO Change Order**
   - **PSI PO Change Order cancelled. Supplier notified.**
PO for Freight: Process Diagram and Scenarios
PO Freight: Process Flow

1. Freight PO created
2. Freight PO approved
3. Freight PO sent through Supplier Portal
4. Freight PO acknowledged and accepted by Freight Forwarder
5. Authorization to Ship issued by CFP to LFP
6. Green Light to Ship issued by LFP to FF
7. Supplier and Freight Forwarder making handover arrangements
8. Freight Forwarder shares FCR based on the information provided by Supplier within 3 working days
9. Supplier documents shared per email
10. Please refer to the process flow prepared by the LSU
PO Freight revised by Freight Forwarder: Process Flow

1. Freight PO revised by Freight Forwarder
2. Freight PO Change Order submitted by Freight Forwarder through Supplier Portal
3. UNFPA is notified about Freight PO Change Order
4. UNFPA reviews Freight PO Change Order
5. UNFPA approves or rejects Freight PO Change Order
   - If approved: Freight PO Change Order implemented against Freight PO, Freight Forwarder notified
   - If rejected: Freight PO Change Order cancelled, Freight Forwarder notified

Action by UNFPA | Action by Supplier | Action by FF
PO Freight revised by UNFPA: Process Flow

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

1. **Freight PO revised by UNFPA**
2. **Freight PO Change Order submitted by UNFPA through Supplier Portal**
3. **Freight Forwarder is notified about Freight PO Change Order**
4. **Freight Forwarder reviews PO Change Order**
5. **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.
   - **Rejected:** **Freight Forwarder rejects Freight PO Change Order**
     - Freight PO Change Order cancelled. UNFPA notified.

**Freight PO Change Order approved (depending on the type of change)**
Training Resources and Support
The User Manual including recording of the webinar will be uploaded to www.unfpa.org
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
Q&A Session
Closing Remarks
for using 
Quantum Supplier Portal