



How to review and respond to a payment request

Your guide to help with payment requests.



How to review and respond to a payment request

Subject: Action Supplier Submission SDP_xxx July 2020 Completed for Supplier xxx

Dear xxx

This is to inform you that the Action Supplier Submission SDP July 2020 for supplier xxx has been completed on Pro-Vide 2.0

Action Scope:

Action Start Date: xxx 2020

Action End Date: xxx 2020

Action Ownership: Supplier

Buyer Action Owner: xxx

Supplier Action Owner: xxx

Buyer Organisation: Bloom

Plan Code: sdp_xxx

Plan Title: xxx

To view the Action, click the following link and enter your Username and Password: <https://pro-vidе.bravosolution.com>

When a Supplier creates a submission from approval, the Buyer Action Owner will receive a notification via email.

The email will include the Action description, the Supplier that has submitted and also a link to the Plan Action.

You can either click the link within the email, or go into Pro-Vide 2.0 and find the action from the Main Dashboard.



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The screenshot shows the Bloom Main Dashboard with three navigation paths highlighted by red boxes and callouts:

- Option 1:** Supplier Development > Supplier Plans > My Supplier Plans
- Option 2:** Supplier ACTIONS GRID > IN PROGRESS
- Option 3:** Supplier Development > My Supplier Plans

The Supplier ACTIONS GRID table is as follows:

ASSOCIATED OBJECT/ACTION STATUS	IN PROGRESS	COMPLETED	TOTAL
Buyer	7	1	8
Supplier	8	1	9

The Supplier PLANS GRID table is as follows:

ASSOCIATED OBJECT/PLAN STATUS	NOT STARTED	RUNNING	COMPLETED	CANCELLED	TOTAL
Contract	0	2	0	0	2

When you get into the payment request, you will notice there are twice as many lines as on the Payment Schedule. This is because there are 2 sets of lines for each Payment Schedule Line.

One is for the Supplier to submit against, the second is for the Buyer to approve. The ODD lines are for SUPPLIER submission and the EVEN lines are for BUYER approval.

1

Option 1:
Click into Supplier PLANS Grid, under the Running section. This will give you a list of all running payment requests. Within each, will have the Action Lines.

2

Option 2:
Click into Supplier ACTIONS Grid, under the "in Progress Section. The Supplier lines can be found under Supplier which will include any submissions from the Supplier. The Buyer actions can be found under Buyer which will include any approvals. Please note, this method doesn't filter by each plan, it gives a list of ALL payment request actions.

3

Option 3:
Click into the Supplier Development section from the menu on the left and select My Supplier Plans. Similar to option 1, this will give you a list of all payment requests.



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	ACTION NAME	ACTION SCOPE	BUYER OWNER	SUPPLIER OWNER	ACTION OWNERSHIP	ALLOW OWNER START	ACTION STATUS	ACTION START DATE	ACTION END DATE
1	Contract_xx SDP - Month 1		Officer Senior Responsible	(Default)	Supplier	Yes	Not Started		
2	Contract_xx Approval - Month 1		Officer Senior Responsible	(Default)	Buyer	Yes	Not Started		
3	Contract_xx SDP - Month 2		Officer Senior Responsible	(Default)	Supplier	Yes	Not Started		
4	Contract_xx Approval - Month 2		Officer Senior Responsible	(Default)	Buyer	Yes	Not Started		
5	Contract_xx SDP - Month 3		Officer Senior Responsible	(Default)	Supplier	Yes	Not Started		
6	Contract_xx Approval - Month 3		Officer Senior Responsible	(Default)	Buyer	Yes	Not Started		

Supplier Submission - Payment Schedule Line 1

Customer Approval - Payment Schedule Line 1

Supplier Submission - Payment Schedule Line 2

Customer Approval - Payment Schedule Line 2

Supplier Submission - Payment Schedule Line 3

Customer Approval - Payment Schedule Line 3

When you get into the payment request, you will notice there are twice as many lines as on the Payment Schedule.

This is because there are 2 sets of lines for each Payment Schedule Line. One is for the Supplier to submit against, the second is for the Buyer to approve.

The ODD lines are for SUPPLIER submission and the EVEN lines are for BUYER approval.

You should see a pair of lines like below. Take note of the Action Status. The Completed line is the Suppliers Submission for your review. The In Progress line is awaiting your approval.

22.1 E2E Supplier Submission 1

Review Supplier Submission

Supplier

Yes

Completed

22.1 E2E Customer Approval 1

Customer Approval

Buyer

Yes

In Progress

FINANCIAL INFORMATION

QUESTION	DESCRIPTION	RESPONSE
PO Line Description	Relevant PO line description linked to this action item	Payment Schedule 1
Total Agreed Payment Schedule Value	The value shown here is the total value of this payment schedule which matches your Purchase Order.	25000.00
Remaining Value Available	The value shown here is the remaining balance available for you to submit for approval in your Service Delivery Plan. This matches your Purchase Order. If you have partially invoiced against this line previously, the figure displayed will be updated to show the maximum remaining available value for this payment schedule. Please note that you cannot submit your Service Delivery Plan requesting a payment for more than the value shown here. Requests for additional payment need to go through change control.	24,999

Firstly, click into the SUPPLIER line. Scroll down to the Collaboration Form.

The top section titled Financial Information relates to how much has been agreed for this milestone and also how much value is remaining. If the Supplier has previously billed against the line, the value will be deducted of that invoiced.



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INVOICING

QUESTION	DESCRIPTION	RESPONSE
Invoice Value	Please input the amount you would like to invoice. (EXCLUDING VAT But INCLUDE the Management Fee) Ensure the amount you are invoicing for does not exceed the amount available on this payment schedule line, as stated within the "Remaining Value Available" section.	1,000
Are there any expenses to be included in this invoicing period?	* Are there any expenses to be included in this invoicing period?	Yes
If yes - What is the value of the expenses to be charged?	If yes - What is the value of the expenses to be charged?	200
If yes - Please attach copy of receipts	If yes - Please attach copy of receipts	(no file attached)

Now scroll down to the section titled Invoicing. This is the section the Supplier has completed to request payment for the works carried out.

This will include the value of the submission, and also if they have requested expenses. The Supplier has the option to submit any receipts for expenses in this section also. You will need to check this value, to ensure you are happy to approve the invoice.

The next section titled Project Status relates to the current status of the Project.

It is here that you will be able to identify the status of the project, including if the Supplier is on track or delayed. It will also include any key deliverables that have been completed, and what they plan to do next.

Take this into consideration also, when approving/rejecting the submission request.

PROJECT STATUS

QUESTION	DESCRIPTION	RESPONSE
Outcome Delivery	* Do you confirm that you have delivered all outcomes detailed in the work order as expected for this reporting period?	Yes
What is the current status of delivery for this project?	* Please select from the 3 options, what is the current status of delivery for this project: On track / Minor Delays / Major Delays	On track
What is the trend in status of delivery since last report	* Please select from the 3 options, what is the trend in status of delivery since last report: No change / Better / Worse	No change
Key deliverables / activities in this period	* Please enter key deliverables / activities in this period	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut velit.
Key deliverables / activities planned next period	* Please enter key deliverables / activities planned next period	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut velit.



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Action: 22.1 E2E Supplier Submission 1

Completed

Now that you have reviewed the Submission, its time to either Approve or Reject the request. Click the back arrow at the top left of the page.

Actions

	ACTION NAME	ACTION SCOPE	BUYER OWNER
1	22.1 E2E Supplier Submission 1		Burt Liam
2	22.1 E2E Customer Approval 1		Burt Liam
3	22.1 E2E Supplier Submission 2		Burt Liam

This will take you back to the payment request actions list.

Click into the Buyer approval line. For the purposes of this guide its line number 2 "22.1 E2E Buyer Approval"

Collaboration Form

SERVICE DELIVERY PLAN APPROVAL

QUESTION	DESCRIPTION	RESPONSE	EDITABLE BY
Confirmation of response	* By selecting yes, you confirm that you understand your response to the previous question. If you have approved the supplier Service Delivery Plan, this will trigger the invoicing process. If you reject the Service Delivery Plan the supplier will be prompted to amend and resubmit.	Yes	Buyer
Service Delivery Plan Response	* Please respond using the dropdowns to confirm whether or not you agree with the Supplier's Service Delivery Plan.	Approved	Buyer
Confirmation of information	* Do you confirm that you accept the delivery and associated costs reported by the supplier in the progress update this reporting period?	Yes	Buyer



Scroll down to the "Collaboration Form" section, about halfway down the page.

Click the Pencil Icon on the right hand side to enter edit mode.



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If you are happy with the Supplier Submission, including the deliverables met and the value submitted, and wish to APPROVE please skip this step.

Rejecting a payment request

If you are not happy with the Submission and wish to REJECT:

Select NO to question 1.

Select REJECTED to question 2.

Select NO to question 3.

Your response should look like this:

QUESTION	DESCRIPTION	RESPONSE
Confirmation of response	* By selecting yes, you confirm that you understand your response to the previous question. If you have approved the supplier Service Delivery Plan, this will trigger the invoicing process. If you reject the Service Delivery Plan the supplier will be prompted to amend and resubmit.	No
Service Delivery Plan Response	* Please respond using the dropdowns to confirm whether or not you agree with the Supplier's Service Delivery Plan.	Rejected
Confirmation of Information	* Do you confirm that you accept the delivery and associated costs reported by the supplier in the progress update this reporting period?	No

Finally we ask NPS questions regarding how the Supplier has delivered in this step of the project. Answer the questions as honestly as you can.

Cancel Save

Once completed, press Save in the top right corner. The next page will give you a chance to review your responses. Once you are happy and have checked the responses, press "Close Action" in the top right corner.

BLOOM will then be in touch, to find out what the issue is so that we can help to resolve this. Once resolved, we can repeat the above steps to get a submission approved.



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If you are happy with the Supplier Submission, including the deliverables met and the value submitted, and wish to APPROVE

Approving a payment request

Select YES to question 1.

Select APPROVED to question 2.

Select YES to question 3.

Your response should look like this:

✓ SERVICE DELIVERY PLAN APPROVAL

QUESTION	DESCRIPTION	RESPONSE
Confirmation of response	* By selecting yes, you confirm that you understand your response to the previous question. If you have approved the supplier Service Delivery Plan, this will trigger the invoicing process. If you reject the Service Delivery Plan the supplier will be prompted to amend and resubmit.	Yes
Service Delivery Plan Response	* Please respond using the dropdowns to confirm whether or not you agree with the Supplier's Service Delivery Plan.	Approved
Confirmation of Information	* Do you confirm that you accept the delivery and associated costs reported by the supplier in the progress update this reporting period?	Yes

Finally we ask NPS questions regarding how the Supplier has delivered in this step of the project. Answer the questions as honestly as you can.

Cancel Save

Once completed, press Save in the top right corner. The next page will give you a chance to review your responses. Once you are happy and have checked the responses, press "Close Action" in the top right corner.

This will trigger an invoice to generate for the Supplier and send the information to our accounts team.

If the full value of the line has been invoiced against, the line will remain closed. If there is value remaining after the invoice, BLOOM will reopen both lines, to allow the Supplier to resubmit for the next value in the future.



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