



How to submit
a payment request



How to submit a payment request

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Payment Requests are setup with project delivery milestones aligned to the Payment Schedule as agreed within the work order.

For each milestone, you can submit a request for payment in line with the deliverables of the project.

Once the submission has been approved, a self billed Purchase Invoice will be generated, accessible via the Bloom Finance Portal.

The system will display two action types:

Payment Request Line: This is where you as the supplier submit a request for payment and highlight report

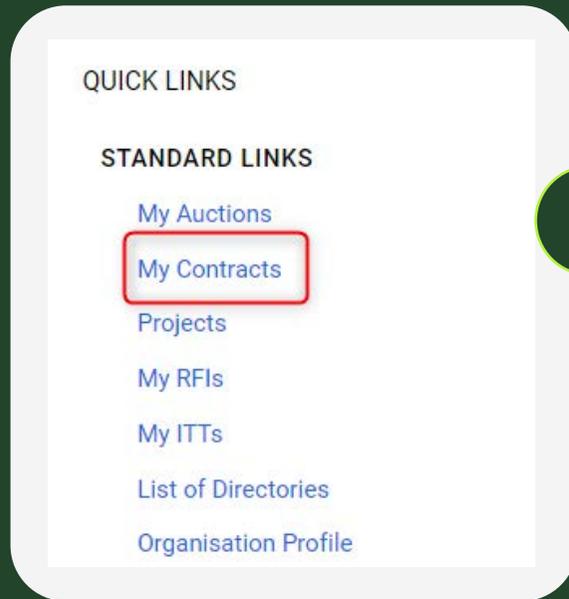
Approval Line: This is where the client will approve or reject the supplier Payment Request. Once approved, payment terms begin.

When both lines are In Progress nothing has yet been submitted. You can click into the line to submit.

	ACTION NAME	ACTION SCOPE	BUYER OWNER	SUPPLIER OWNER	ACTION OWNERSHIP	ALLOW OWNER START	ACTION STATUS	ACTION START DATE	ACTION END DATE
1	22.1 E2E Supplier Submission 1	Project Name and Milestone/Action Type	Liam	(Default)	Supplier	Yes	In Progress	10/03/2022	17/04/2022
2	22.1 E2E Customer Approval 1	Project Name and Milestone/Action Type	Liam	(Default)	Buyer	Yes	In Progress	18/03/2022	17/04/2022



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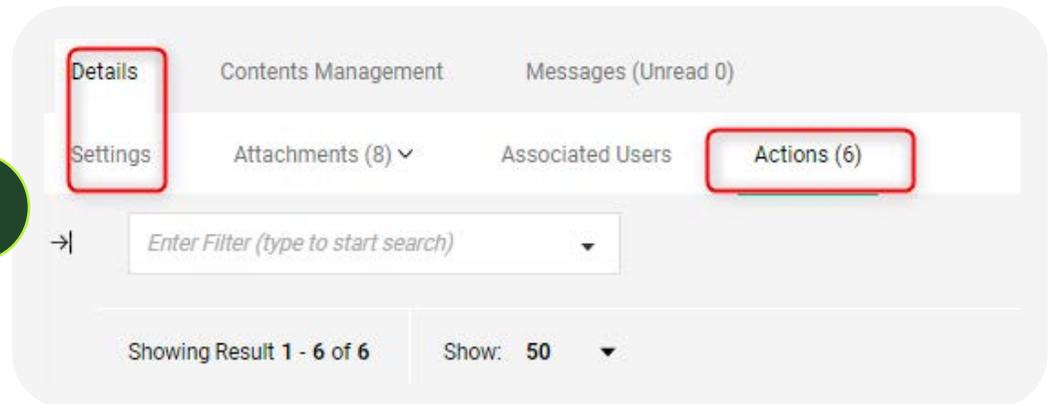
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To Submit your Payment Request action, you first need to go into your Work Order Contract. You can do this by clicking My Contracts under the quick links section on your Main Dashboard.

Once you have the list of your Work Order Contracts, click into the Contract/Project you wish to raise a payment request for.

From the headers click Details > Settings > Actions. The number after the word actions, relates to how many lines are in the Payment Schedule. There will be twice as many as in the Work Order Contract, as each ODD line is the Supplier Submission and each EVEN line is the CUSTOMER approval.

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Showing Result 1 - 6 of 6 Show: 50

ACTION NAME	SUPPLIER ACTION OWNER	ACTION OWNERSHIP ↓	ACTION STATUS
22.1 E2E Supplier Submission 1	(Default)	Supplier	In Progress
22.1 E2E Supplier Submission 2	(Default)	Supplier	In Progress
22.1 E2E Supplier Submission 3	(Default)	Supplier	In Progress
22.1 E2E Customer Approval 2	(Default)	Buyer	In Progress
22.1 E2E Customer Approval 3	(Default)	Buyer	In Progress
22.1 E2E Customer Approval 1	(Default)	Buyer	In Progress

1 22.1 E2E Supplier Submission 1

2 22.1 E2E Supplier Submission 2

3 22.1 E2E Supplier Submission 3

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If you look at the Action Ownership column, you can see who owns the action (Supplier or Client.) If you click the header, you can filter the line actions by owner, so you can see all of your Supplier Actions at the top.

Once you have your list of actions, click into the action you would like to submit against. For the purposes of this guide we are going to submit against line 1 of the plan.



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Bloom 12:14 WET - Western Europe Time

Welcome Sally HR

Action: 22.1 E2E Supplier Submission 1 In Progress

Cancel Action Complete Action

Details Collaboration Area Messages (Unread 0)

Collaboration Overview

Action Description
Please confirm the current status of delivery against plan and the percentage of planned invoice value you propose to submit for approval and receipt prior to your submission of the approved value.

Buyer Attachments
No Attachments

Supplier Attachments
No Attachments

Collaboration Form

FINANCIAL INFORMATION

QUESTION	DESCRIPTION	RESPONSE	EDITABLE BY
PO Line Description	Relevant PO line description linked to this action item	Payment Schedule 1	External System
Total Agreed Payment Schedule Value	The value shown here is the total value of this payment schedule which matches your Purchase Order.	25000.00	External System
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.	24998	External System

Edit Values

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Click Edit Values under the collaboration form, this should be halfway down the page.





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The next section titled Project Status will ask you to complete 5 questions relating to the Project. This includes if you are on track or off track and what key deliverables you have completed and plan to complete. This helps the Customer to further understand the status of the Project and also helps them to approve the payment submission.

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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.

The final section titled **Payment Request Status** is to be used by Bloom only, so no further action is required.

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Once you have completed your submissions, click **Save** in the top right corner of the page. This will take you to an overview of the form, where you can check all information is correct.

Finally click **Complete Action** in the top right corner of the page.

This will close the Submission line, and the Customer will be notified by email to review and approve your submission.

Once the Customer has approved the submission an invoice will automatically generate, and you will be able to view this within the Supplier Invoicing Portal.



You can login here:



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Whilst awaiting approval from the Customer, if you go back into your contract and plan actions, you can review the status here. You will see on the screenshot below that Submission 1 is completed, but Approval 1 is In Progress this means we are still awaiting Customer approval.

ACTION NAME	SUPPLIER ACTION OWNER	ACTION OWNERSHIP ↓	ACTION STATUS
22.1 E2E Supplier Submission 1	(Default)	Supplier	Completed
22.1 E2E Supplier Submission 2	(Default)	Supplier	In Progress
22.1 E2E Supplier Submission 3	(Default)	Supplier	In Progress
22.1 E2E Customer Approval 2	(Default)	Buyer	In Progress
22.1 E2E Customer Approval 3	(Default)	Buyer	In Progress
22.1 E2E Customer Approval 1	(Default)	Buyer	In Progress

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Once the Customer has approved, you will see both lines are in completed meaning they have approved and your invoice will be available. You will be notified by email once the line has been approved.