



## Supplier finance portal

Your guide to accessing sales orders & invoices

# From the Finance Portal you can access all Sales Orders and Invoices for your Bloom projects.

The portal requires a separate login to the project side of the system and once set up, you can create new user accounts for finance users and additional members of your team.

Your lead contact will receive an invite to the finance portal upon awarding of your first project with Bloom. If you do not setup an account at that time, Bloom can re-invite the lead contact at any time (it must be the same contact for security purposes).

Once set up, all invoices and sales orders prior to creation of your account will be accessible from the portal.



Creating a portal account



Locating sales orders



Locating sales invoices



Adding a new user

# Creating a portal account





# Creating a portal account

## Start Registration

You will receive an invitation email to the Bloom contract lead – the user who setup the Bloom account.

- Click 'register now'.
- Once on the portal landing page, click **Continue with Registration**

If you haven't received an invite, please click below:



**Your Contact info**

First Name \*  Last Name \*

Title

Phone Number \*

international phone numbers must begin with +

Preferred Time Zone \*

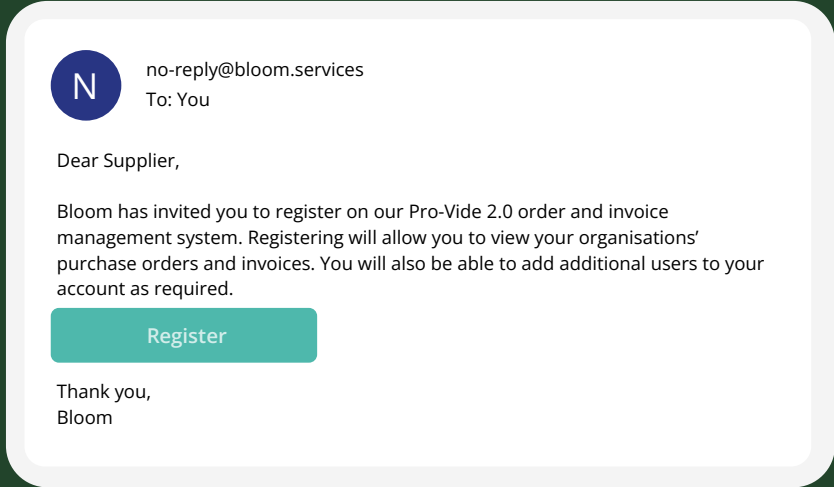
**Your Login**

Email

Password \*  Re-Enter Password \*

Account Recovery Question \*

Answer \*   Confirm Answer \*



## Register Details

Complete your registration details.

**NOTE** - The phone number will require a country code +44 (then remove the first '0')

Click Create an account



This will create you an Invoice Portal login. This is different to your Pro-Vide 2.0 Login.



# Creating a portal account

### Bloom Supplier 10

Supplier Number: JA\_204020

Registration Invited for:  
Bloom

**1 of 4** Steps Complete

- Welcome
- Company Overview**
- Business Details
- Addresses
- Contacts
- Certify & Submit

[Registration FAQ](#) | [View History](#)

### Company Overview

To save changes, you must first click **Get Started** on the [Welcome](#) page to accept the terms and conditions.

The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.

Country of Origin

Does your business have a DUNS number?  Yes  No

Tax ID Number

VAT Registration Number

VAT Exempt  Yes  No

Supplier Tax Representative ID

Commercial Registered Court

Supplier Registered Seat

Supplier Commercial Registration Number

[Previous](#) [Next](#) [Save Changes](#)

### Complete Your Registration

- Company Overview
- Business Details
- Addresses
- Contacts
- Certify & Submit

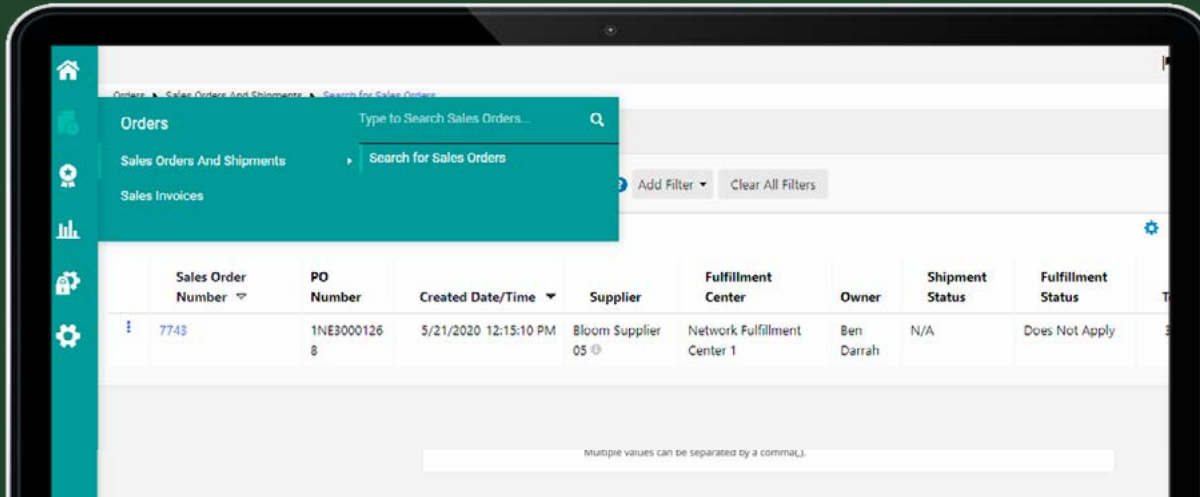
**NOTE** - The phone number will require a country code +44 (then remove the first '0')

# Locating sales orders





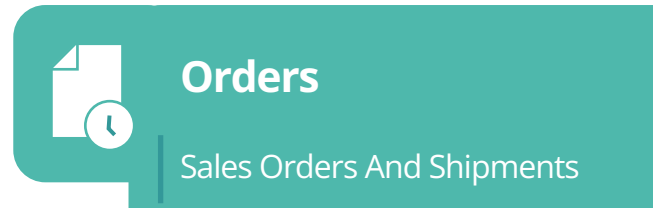
# Locating sales orders



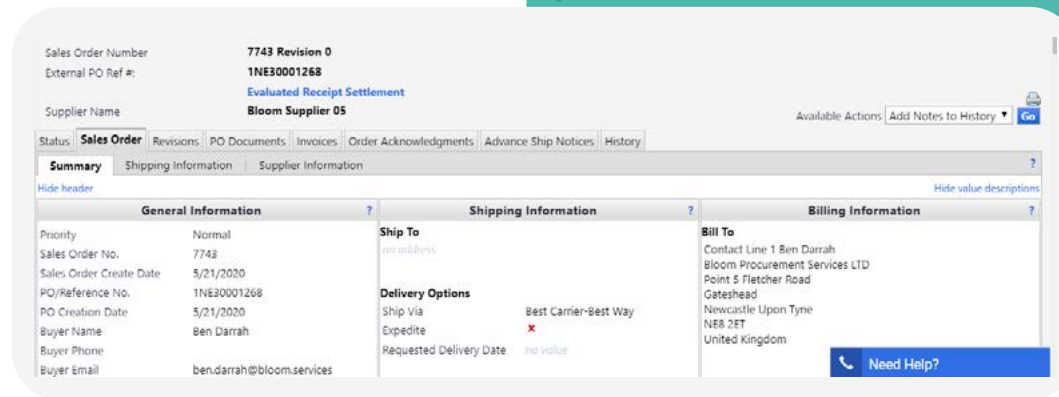
From the left-hand navigation, go to the **orders icon**.



Click **Sales Orders and Shipments**  
Search for **Sales Orders**



Type to Search Sales Orders...  
Search for Sales Orders



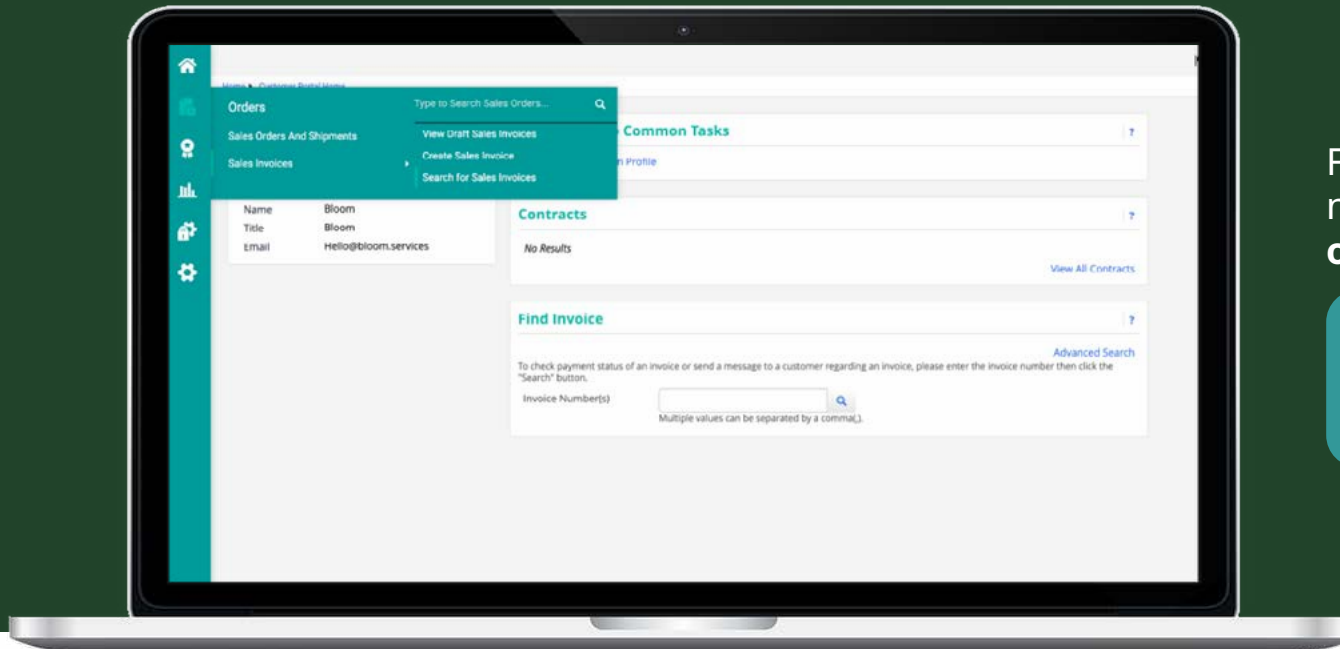
# Locating sales invoices







# Locating sales invoices



From the left-hand navigation, go to the **orders icon**.



Select **'Sales Invoices' > 'Search for Sales Invoices'**

You can search on project or milestone name using the search function.



## Orders

- Sales Orders And Shipments
- Sales Invoices

Type to Search Sales Orders...


- View Draft Sales Invoices
- Create Sales Invoices
- Search for Sales Invoices



# Locating sales invoices

NB. Historical invoices (prior to account creation) are visible, however you may need to wait for a few moments

- To see invoice detail, click into the invoice number
- Here you can download a PDF copy of the invoice

Electronic Invoice 



Orders > Sales Invoices > Search for Sales Invoices

### Search Sales Invoices

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Sales Invoice/Credit Memo No.	Customer	Created By	Sales Order Number	PO Number	Invoice Date	Submitted Date	Pay Status	Payment Date	Payment Method	Type	Total Amount
1002291	Bloom	System	7743	1NE30001268	5/21/2020	5/21/2020 12:15:11 PM	Payable	-	Unknown	Invoice	12,000.00 GBP

Invoice No. **1002291** Available Actions: Create Credit Memo [Go](#)

Customer: **Bloom**

Invoice Date: **5/21/2020**

Payment Status: **Payable**

PO Number: **1NE30001268**

Sales Order Number: **7743**

Electronic Invoice: [Download](#)

Supplier Attachments: [add attachment...](#)

**Warning:** Currency not enabled. Portal Administrator: To activate currency, go to Setup > General Site Settings > Currency Configuration.

Invoice | Messages | History

Hide header | Hide value description

General Information | Billing Information | Customer Invoice Information

# Adding a new user

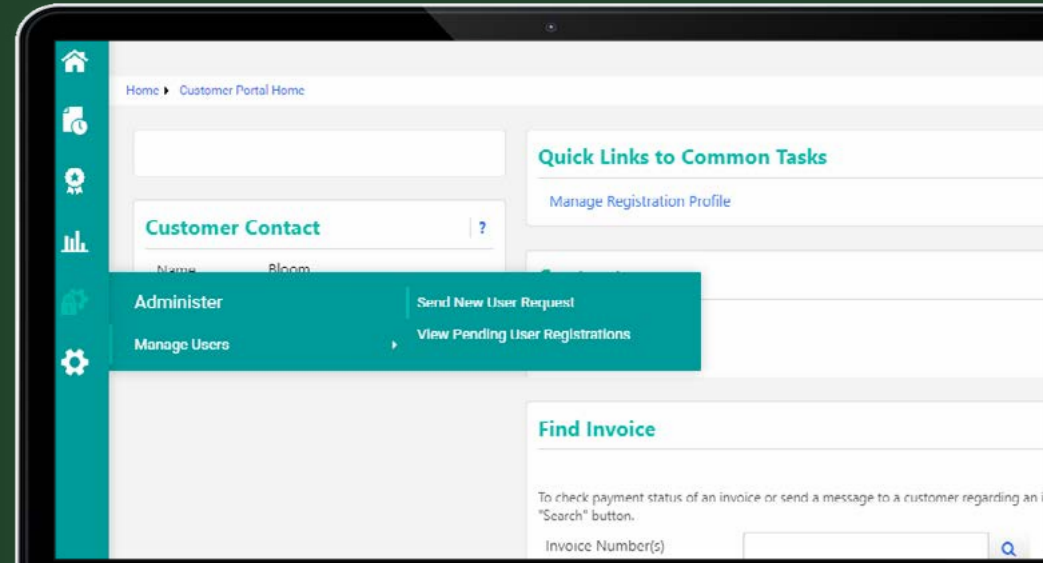




# Adding a new user

Go to **Administer** via the left navigation.

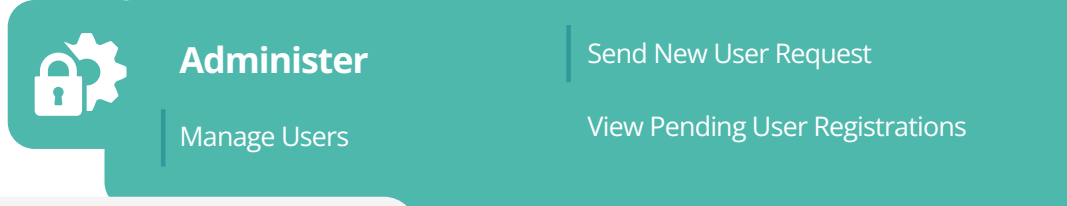
Click **Manage Users > Send New User Request**



Complete user details and send

- Input the users details
- Send User Request

This will send an email to the user who can then set up their account.



Administer > Manage Users > Send New User Request

First Name *	<input type="text" value="Joy"/>
Last Name *	<input type="text" value="Davison"/>
Title	<input type="text" value="Mrs"/>
Phone Number *	<input type="text" value="+441 191456456"/> <small>ext.</small> <input type="text"/>
Mobile Phone Number	<input type="text"/>
E-mail Address *	<input type="text" value="Joydavison@bloomsupplier05.com"/>
Role	<input type="text" value="Manage All Portal Activities"/>