

# **Step By Step Guide to Viewing Purchase Orders, Invoices and Payment Status through the BCP Council Supplier Portal**

# Introduction

This guide is to be used by suppliers to view Purchase orders, invoices, invoice payment status and your supplier information we hold through the Microsoft Dynamics BCP Council Supplier Collaboration Portal.

Microsoft Dynamics F&O is Bournemouth, Christchurch, and Poole's ERP system for managing transactions with suppliers from raising purchase orders, to receiving and managing invoices through to payment.

The 'Supplier Portal' is where suppliers can view all Purchase Orders that have been sent to them by BCP Council and view invoices processed against these Purchase Orders and the payment status of the invoices.

## Pre-requisites before using the Supplier Portal

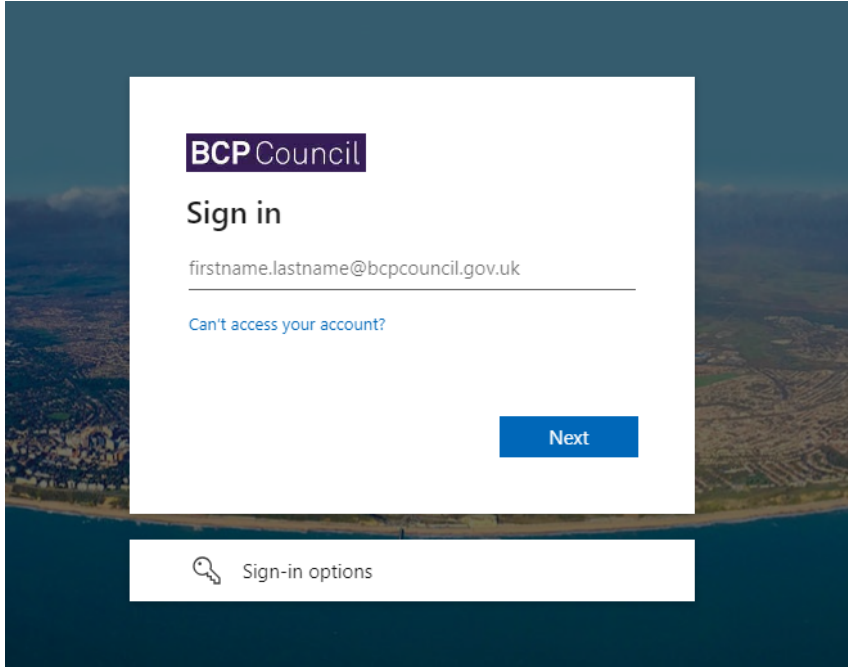
1. You will need to have supplied the Council with a contact name and email you wish to use to access the portal.  
Webmail email addresses with domains such as @hotmail.com or @gmail.com cannot be used to register a user.
2. The Council will register this email and allow access to the portal. You will receive an invitation email from BCP Council to the email selected for the user account. You must accept the invitation link within the email.
3. You will need to use the **Microsoft Authenticator** app to access the portal. If you do not currently use this, the app can be downloaded for free from the Google Play or Apple App stores.

## Contact Details

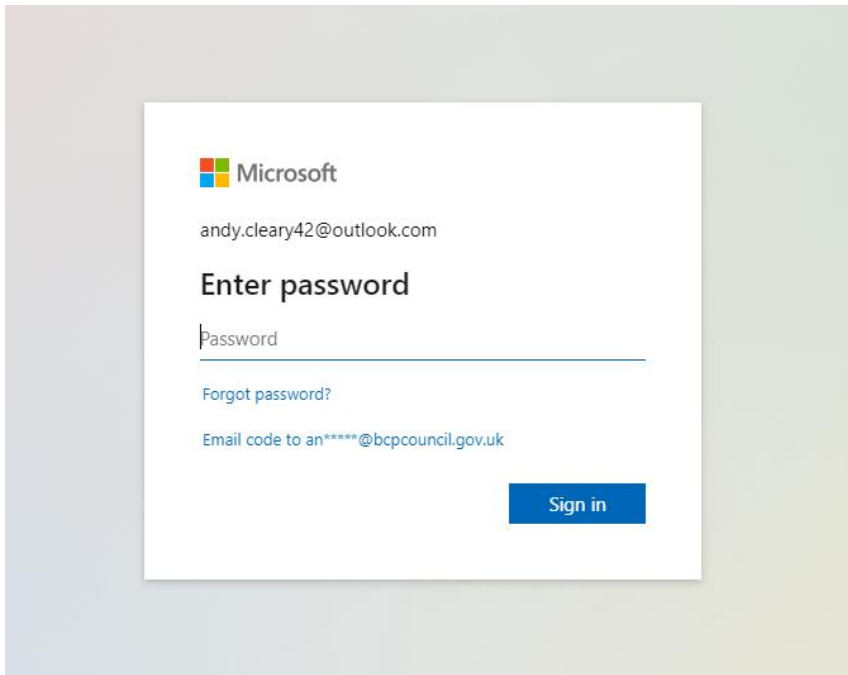
Telephone: 01202 128800

E-mail: [financial.systems.helpdesk@bournemouth.gov.uk](mailto:financial.systems.helpdesk@bournemouth.gov.uk)

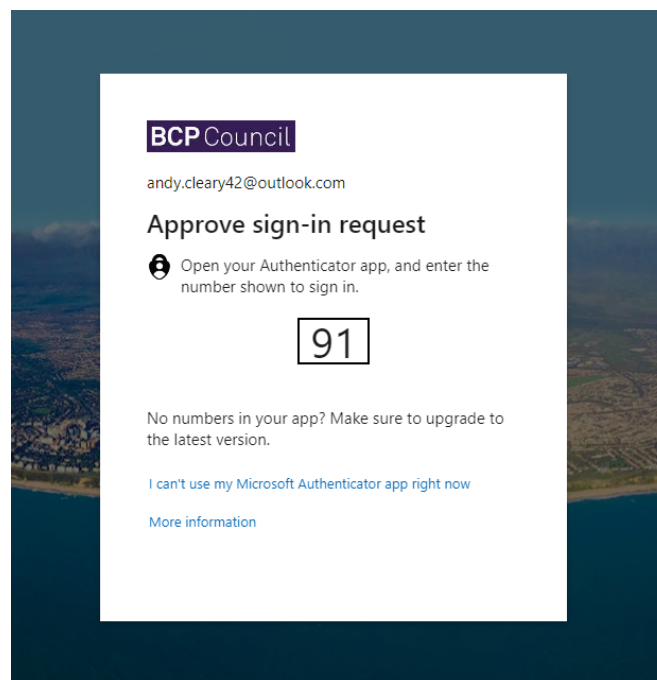
- a) Access the Supplier Portal through the URL: <https://bcpcouncil.operations.dynamics.com>
- b) Enter the email you registered with and click **Next**. If you are unsure of your login details, please contact the Council on the details at the start of this guide for your user ID (email you registered with). If you know your user ID and have forgotten your password, please use the 'Forgot Password' link on the next screen.

The image shows a web browser window displaying the BCP Council login page. The page has a dark blue header with the BCP Council logo. Below the logo, the text "Sign in" is displayed. A text input field contains the placeholder text "firstname.lastname@bcpcouncil.gov.uk". Below the input field, there is a link that says "Can't access your account?". A blue button labeled "Next" is positioned to the right of the input field. At the bottom of the page, there is a section titled "Sign-in options" with a magnifying glass icon.

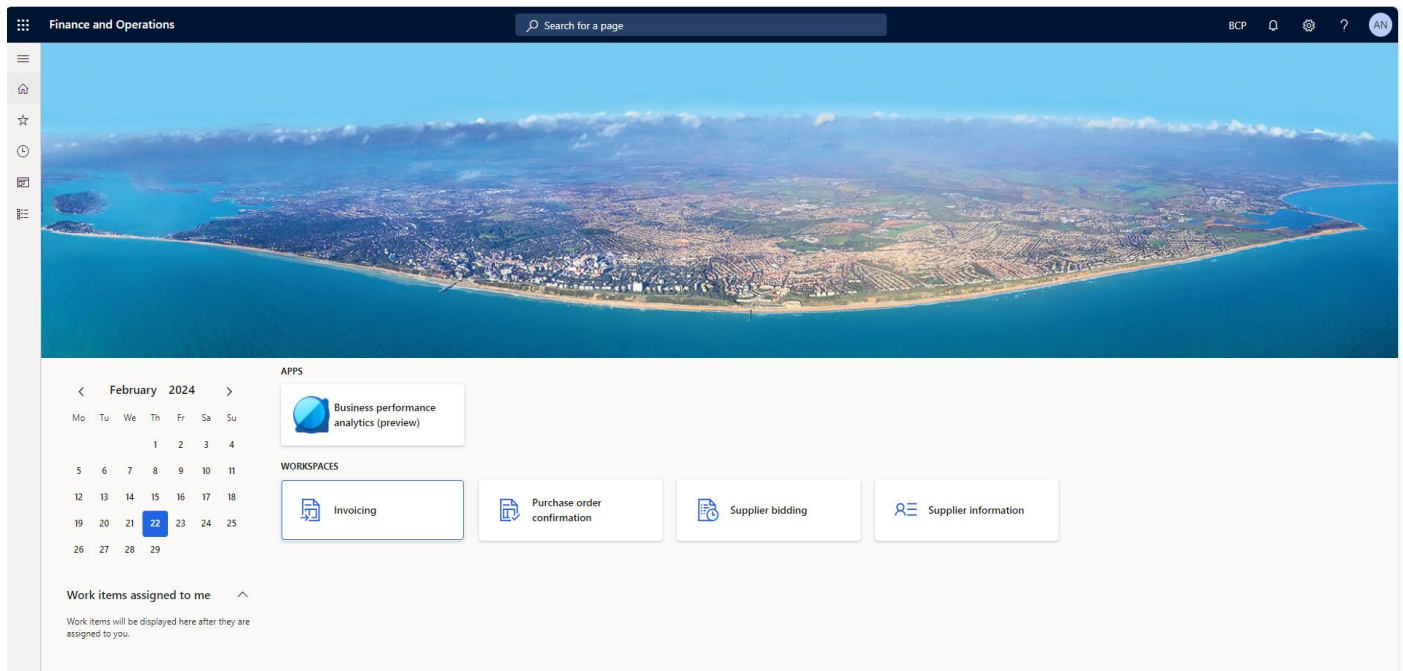
- c) Enter your password (this is your email account password) and click Sign in. Passwords are case sensitive.

The image shows a web browser window displaying the Microsoft login page. The page has a light gray background. The Microsoft logo is at the top left. Below the logo, the text "Enter password" is displayed. A text input field contains the placeholder text "Password". Below the input field, there is a link that says "Forgot password?". A blue button labeled "Sign in" is positioned to the right of the input field. At the bottom of the page, there is a link that says "Email code to an\*\*\*\*\*@bcpcouncil.gov.uk".

- d) Open your Microsoft Authenticator app and enter the number displayed to the complete sign in



- a) The supplier portal home page will be displayed
- b) Four workspaces are displayed. We will cover **Invoicing**, **Purchase Order Confirmation** and **Supplier Information**. Supplier Bidding is not currently undertaken by the Council through this system so is not covered.



## View Purchase Orders

- To view Purchase Orders sent to you by the Council, select '**Purchase Order Confirmation**'.
- Select the **Open confirmed purchase orders** tile to see all open purchase orders.

Standard view ▾

### Purchase order confirmation

201625 ▾

^ Summary

0  
Purchase orders for review

0  
Awaiting customer action

5  
Open confirmed purchase orders

- Your open purchase orders will be displayed.
- Select a purchase order from the left hand column to view the purchase order details.

Preview/Print ▾ History Notes and attachments Options

Filter

BCP310752  
Open order  
201625

BCP314861  
Open order  
201625

BCP314865  
Open order  
201625

BCP322615  
Open order  
201625

BCP322617  
Open order  
201625

BCP322619  
Open order  
201625

BCP322620  
Open order  
201625

BCP Standard View ▾

### Open confirmed purchase orders

SUPPLIER	PURCHASE ORDER	DELIVERY	PAYMENT	Payment	DELIVERY
Supplier account 201625	Purchase order BCP322620	Mode of delivery Open order	Method of payment BACS	Net 30	Address BCP Civic Centre Bourne Avenue Bournemouth EN Dorset
Invoice account 201625	Purchase order status Open order	Delivery terms	Currency GBP		

Lines

Display dimensions Notes and attachments

Line number	Line status	Item number	Procurement category	Product name	Requested receipt date	Confirmed receipt date	Quantity	Unit	Net amount
1	Open order		43503 - Conferences & Events		22/02/2024		1.00	ea	100.00

Line details

DELIVERY	PRODUCT NAME	Origin
Address BCP Civic Centre Bourne Avenue Bournemouth EN Dorset	External Text 1 attendee at Birmingham conference on 1st March	Purchase

- Any external notes and attachments added to the purchase order can be viewed by clicking on the header 'Notes and Attachments' link at the top of the screen.

Finance and Operations

Search for a page

← History Notes and attachments Options

Filter

BCP Standard View ▾

### Open confirmed purchase orders

- Click the back arrow at the top left of the screen to return to the previous screen

- g) To view ALL purchase orders including that fully invoiced click on the **All confirmed purchase orders** link at the footer of the screen

Options

Standard view

### Purchase order confirmation

201625

Purchase orders for review   Awaiting customer action   Open confirmed purchase orders


Orders

Purchase orders for review

Awaiting customer action

Open confirmed purchase orders

Filter

Purchase order	Date time received	Earliest requested receipt ...	Ed...
 <p>We didn't find anything to show here.</p>			

See more

Links

Purchase order supplier confirmation ...   **All confirmed purchase orders**

- h) You can filter to a specific order or order status by using the **Filter** field in the top left column. Enter the PO number and select your **Enter** key.

BCP Standard View

### All confirmed purchase orders

BCP322620

Purchase order: "BCP322620"

Purchase order status: "BCP322620"

Supplier account: "BCP322620"

SUPPLIER	PURCHASE ORDER	DELIVERY	PAYMENT	Payment	DELIVERY
Supplier account	Purchase order	Mode of delivery	Method of payment	Net 30	Address
201625	BCP322620		BACS	Currency	BCP Civic Centre
Invoice account	Purchase order status	Delivery terms		GBP	Bourne Avenue
201625	Open order				Bournemouth
					EN
					Dorset

Lines

Display dimensions   Notes and attachments

Line number	Line status	Item number	Procurement category	Product name	Requested receipt date	Confirmed receipt date	Quantity	Unit	Net amount
1	Open order		43503 - Conferences & Events		22/02/2024		1.00	ea	100.00

Line details

DELIVERY	PRODUCT NAME
Address	External
Bourne Avenue	
Bournemouth	
EN	
Dorset	
BH2 6DY	
	Text
	1 attendee at Birmingham
	conference on 1st March

BCP315375  
Cancelled  
201625

BCP322620  
Open order  
201625

BCP322614  
Invoiced  
201625

BCP322615  
Open order  
201625

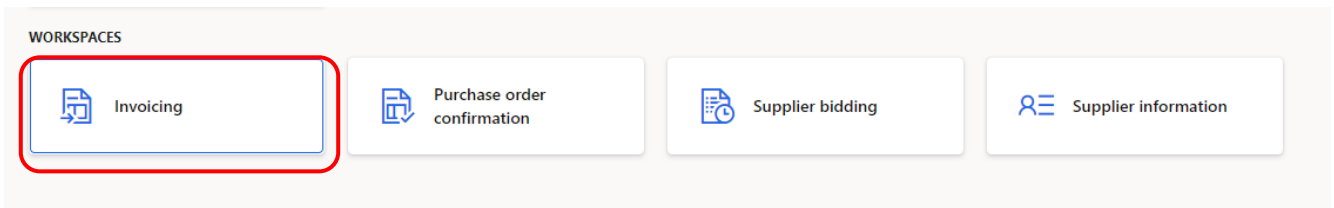
BCP322616  
Received  
201625

BCP322617  
Open order  
201625

BCP322618  
Invoiced  
201625

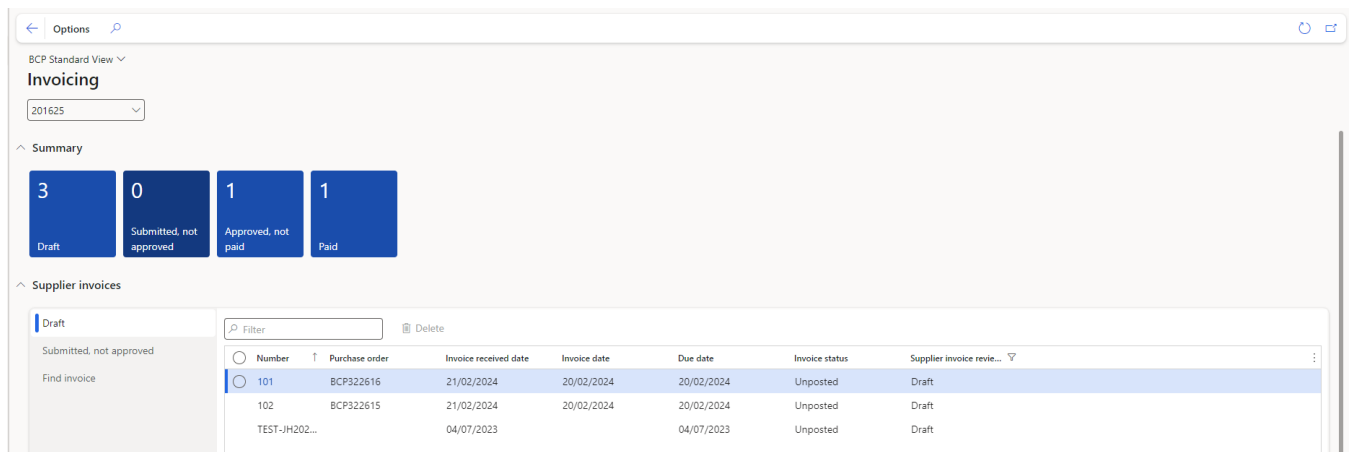
BCP322619  
Open order  
201625

a) From the supplier portal home page click the **Invoicing** workspace to view invoices.



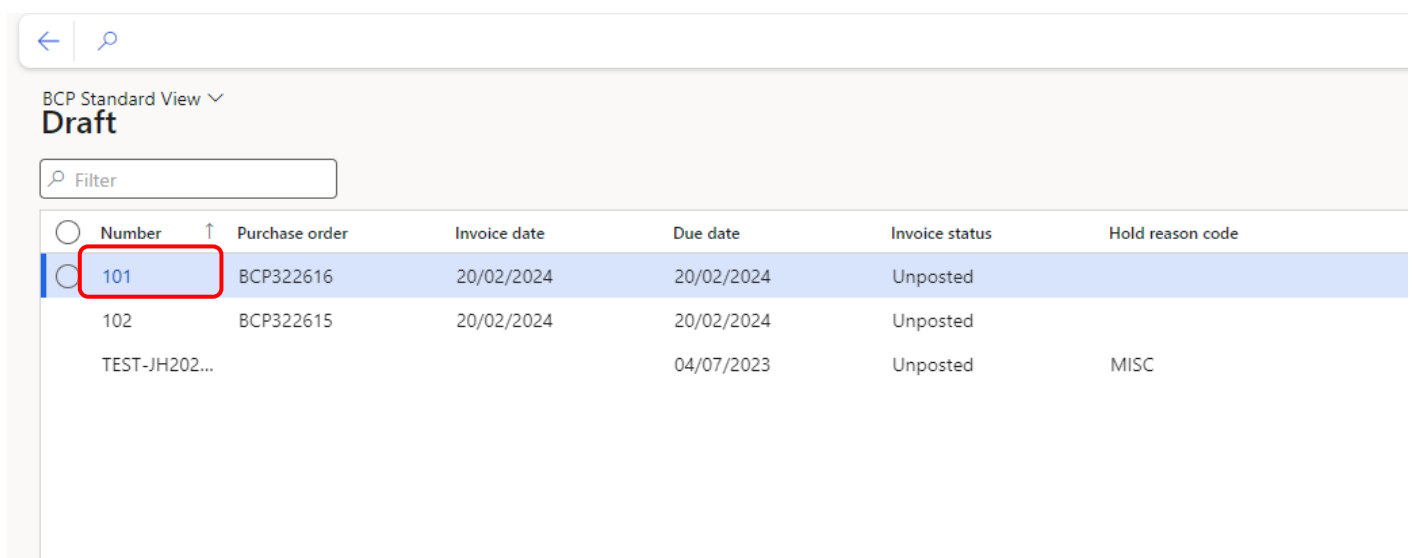
b) The 4 summary tiles display the 4 different possible status of the invoices you have submitted to the Council.

- Draft – awaiting further verification by the Creditors team
- Submitted, not approved – awaiting approval (receipting) by the Service
- Approved not paid – approved (matched to order and receipt) and awaiting payment according to terms
- Paid – paid as per payment terms



c) Click on each tile to see the invoices with that current status.

d) Click on the invoice number link to open the invoice.





e) The invoice information is displayed.

Finance and Operations

Search for a page

BCP

Page options  
Go to

Supplier invoice | 101: TEST SUPPLIER BCP PROCUREMENT (TEST ONLY) | Standard view

101

Lines Header

Supplier invoice header

101 | GBP | 20/02/2024

INVOICE IDENTIFICATION		Purchase order	DATES	APPROVAL	Invoice account	Remittance location
Number	101	BCP322616	Invoice date 20/02/2024	Workflow status Draft	201625	TEST SUPPLIER BCP PROCUREM...
Invoice description		Currency GBP	Due date 20/02/2024	SUPPLIER Name TEST SUPPLIER BCP PROCUREM...		Address Town Hall Bourne Avenue BOURNEMOUTH BH10 4NN
		Has notes and attachments <input checked="" type="radio"/> No				

Lines

+ Add line Remove Financials Notes and attachments

Item number	Item name	Procurement category	Quantity	Unit price	Line net amount	VAT group	Item VAT group	Has notes and ...
100		19001 - Agency Staff	100.00	1.00	100.00	P-DOM	_STD20	

f) The **Approved Not Paid** tile will show you the Due date of your invoice.

BCP Standard View

Approved, not paid

Filter

Invoice	Invoice amo...	Purchase order	Invoice date	Due date	Invoice status	Hold reason code	Payment Issued
100	120.00	BCP322614	20/02/2024	20/02/2024	Unpaid		

g) The **Paid** tile will show you invoices paid and date payment was issued. Payment will reach your bank account 1 working day after the 'Payment Issued' date.

BCP Standard View

Paid

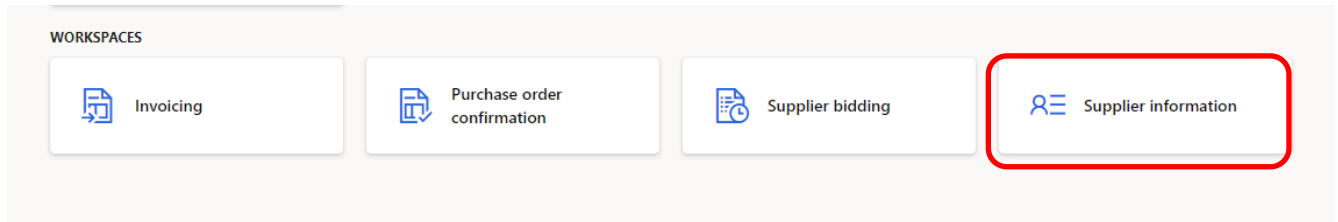
Filter

Invoice	Invoice amo...	Purchase order	Invoice date	Due date	Invoice status	Payment Issued
104	120.00	BCP322618	31/03/2024	31/03/2024	Paid	01/04/2024

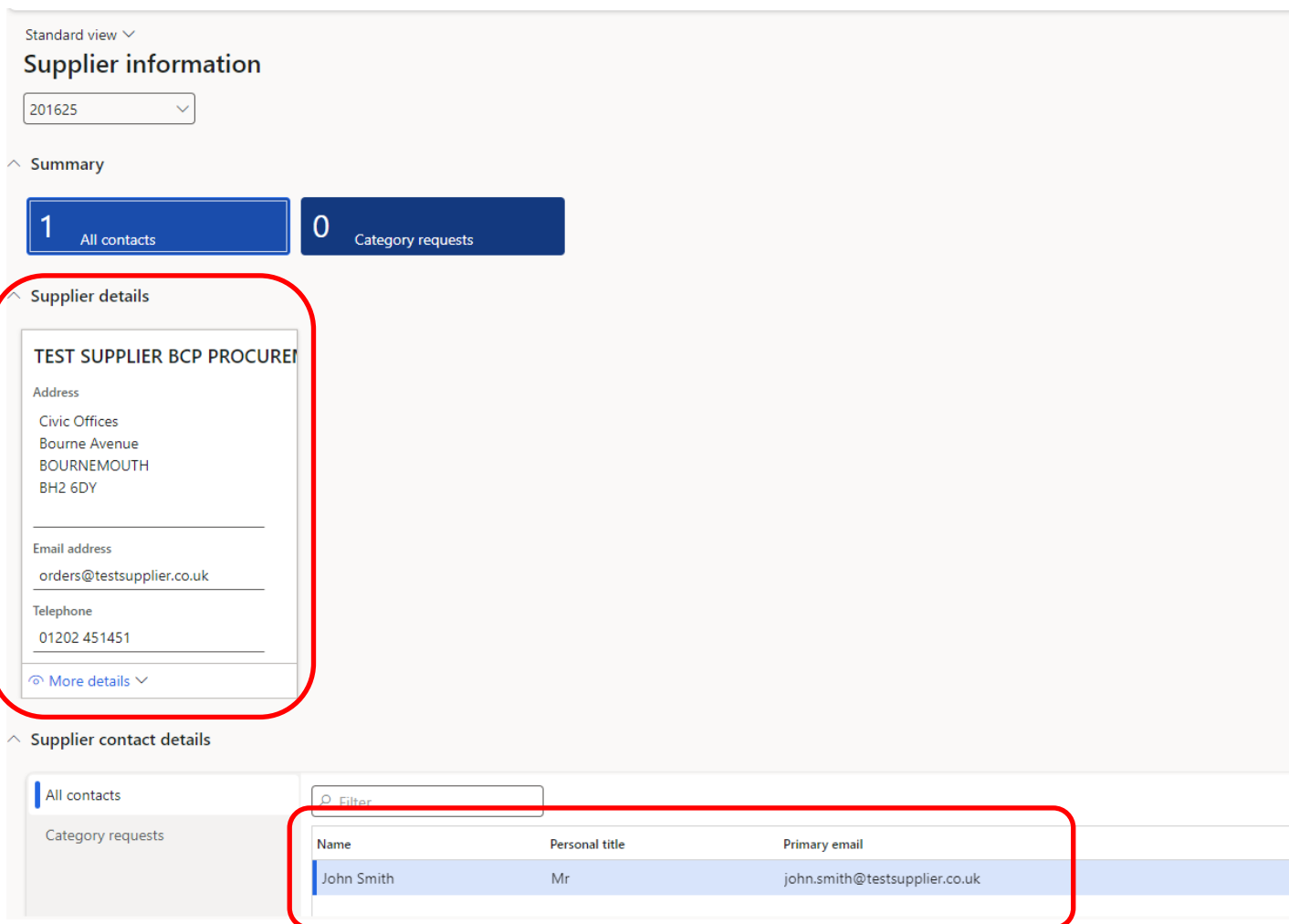
- h) You can search for a particular invoice by using the **Find invoice** option from the left-hand column.
- i) You can search for the invoice by invoice number, purchase order number, invoice date or invoice status. Enter your search term in the search field and select your **Enter** key.

The screenshot displays the 'Invoicing' section of a software interface. At the top, there is a navigation bar with a back arrow, 'Options', and a search icon. Below this, the 'BCP Standard View' is selected, and the 'Invoicing' title is shown. A dropdown menu currently displays '201625'. Under the 'Summary' section, four blue boxes represent different invoice statuses: 'Draft' (3), 'Submitted, not approved' (0), 'Approved, not paid' (1), and 'Paid' (1). The 'Supplier invoices' section is expanded, showing a list of filters: 'Draft', 'Submitted, not approved', and 'Find invoice' (which is highlighted with a red box). To the right of the 'Find invoice' button, a search dropdown menu is open, showing a search bar with '101' and a list of search criteria: 'Number: "101"', 'Purchase order: "101"', 'Invoice date: "101"', and 'Invoice status: "101"'. The entire search dropdown menu is also highlighted with a red box.

- a) Select the Supplier Information tile on the home page to view the details we hold for your company such as bank details, address, and contact information.



- b) The landing page will show the contact emails we have set up as your user accounts to access the portal and the summary information of the address and primary contact email and phone numbers we hold for you.



- c) To view further information that we hold click on the **More details** link and select the section you wish to view.

The screenshot shows the 'Supplier information' page for supplier 201625. Under the 'Summary' section, there are two buttons: '1 All contacts' and '0 Category requests'. The 'Supplier details' section is expanded, showing a dropdown menu with options: General, Addresses, Contact information, Business, Categories, State tax ID, Certifications, and Bank information. A red circle highlights the 'Supplier details' section and its dropdown menu.


- d) To view the bank details we hold for you, select **Bank information**. You will then see the last 4 digits of the bank account and sort code we hold for you.

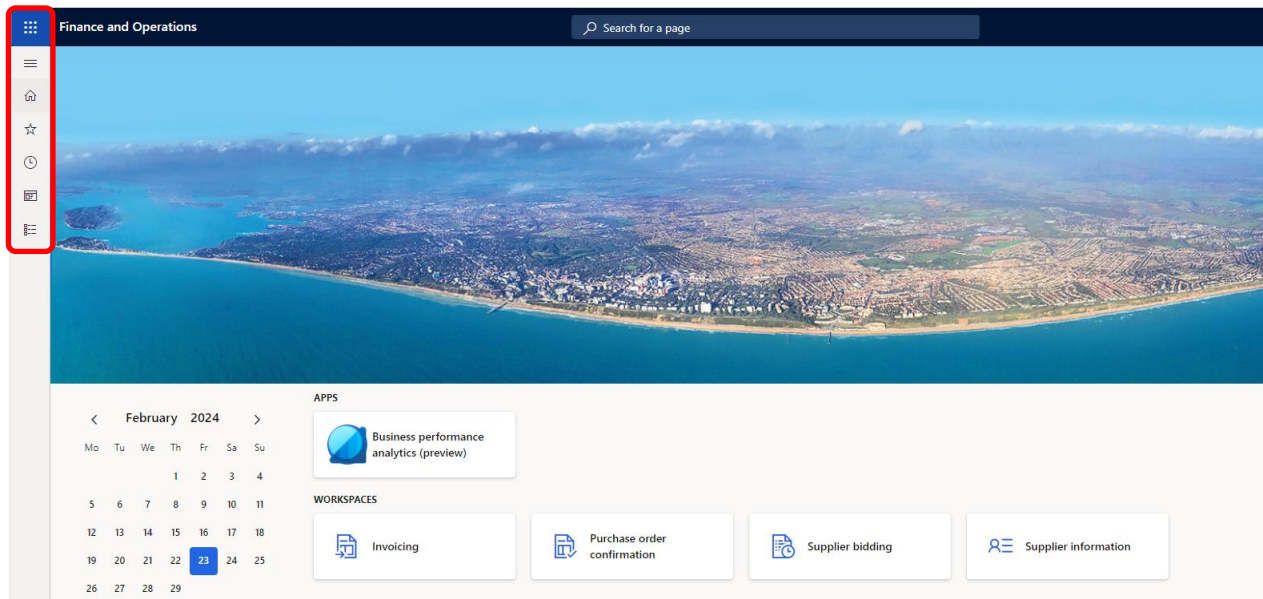
The screenshot shows the 'My company information' page for supplier 201625. The 'Bank information' tab is selected. The page displays a table with bank account details. A red circle highlights the 'Bank account number' and 'Sort Code' columns.

Bank account	Bank name	Bank account number	Sort Code	Expiration date	Status
<input type="radio"/> MAIN		xxxx6622	xx1307		Active

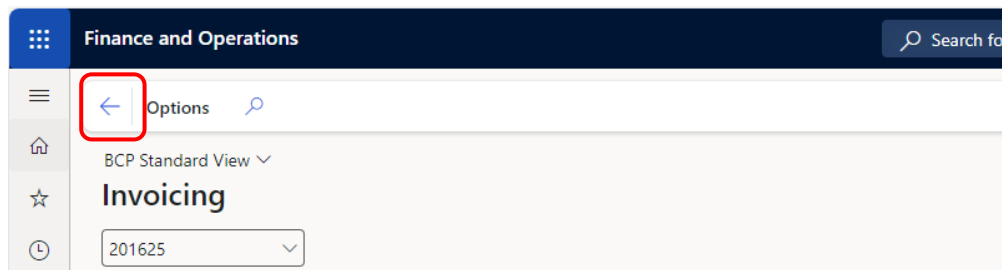
### Note

If any of the information we hold for your company is incorrect or changes, please email [financial.systems.helpdesk@bcpcouncil.gov.uk](mailto:financial.systems.helpdesk@bcpcouncil.gov.uk) to advise the correct information so this can be updated

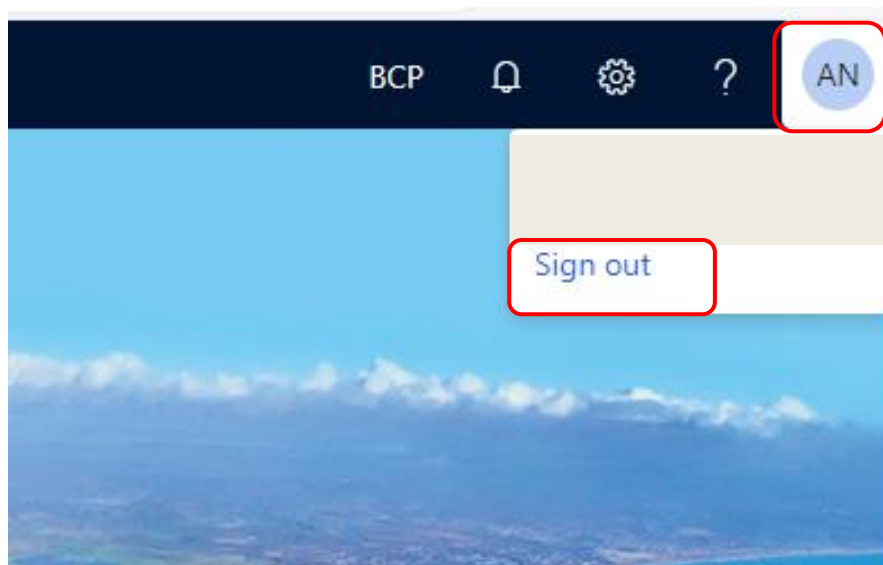
- a) From any page in the portal, you can click on the Home  icon on the left hand toolbar to return to the portal home page.




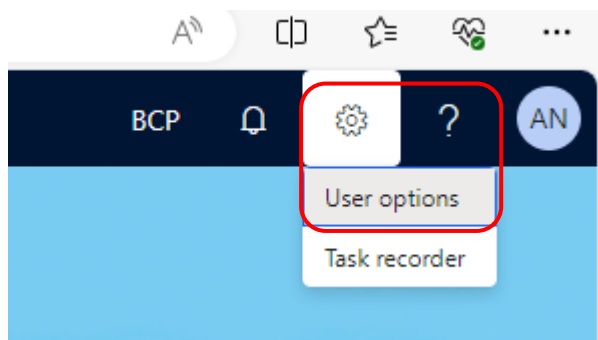
- b) Click the **back arrow** at the top left of the screen to return to the previous screen.



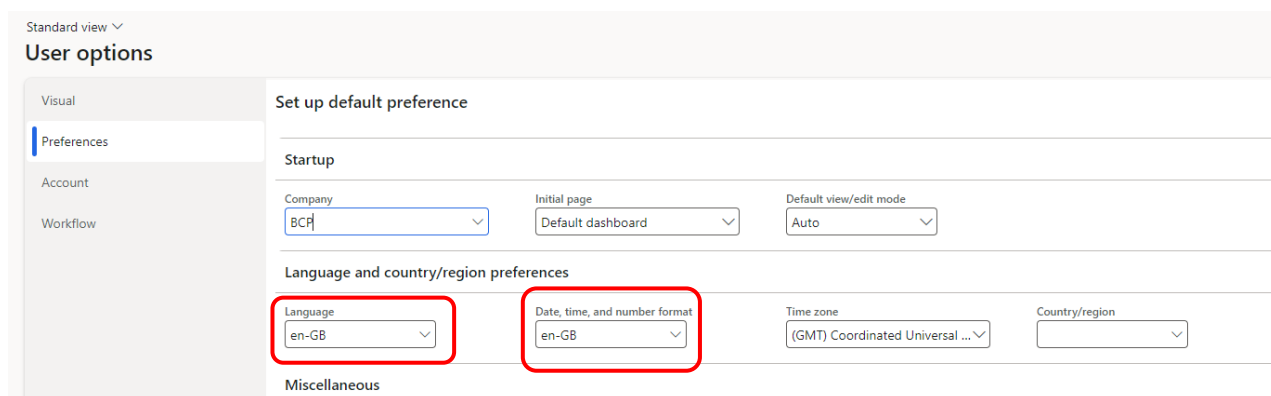
- c) Select the user account email profile icon in the top right-hand corner to select **Sign out** option.



- d) We recommend system preferences are set as English GB settings to ensure date formats are in UK DD/MM/YYYY format. To check and amend this select the settings icon  from the top right-hand toolbar then select **User Options**.



- e) Then select **Preferences** and ensure the **Language** and **Date, time and number format** are both set as **en-GB** format.



- f) If you need to update these click the dropdown arrow in the field and select **en-GB** format then click **Save** from the top left hand menu.

