CONSULTANT/SUPPLIER USER GUIDE

October 2024

Contents

Consultant/Supplier User Guide

This guide is targeted to Consultants and Suppliers accessing the Cadmus Supplier Portal.
The Consultant/Supplier is responsible for:

1. Reviewing the submitted Purchase Orders (POs).
2. Attaching invoices to a Deltek record.
3. Entering invoice line items (including labor hours if applicable).
4. Submitting the invoice.

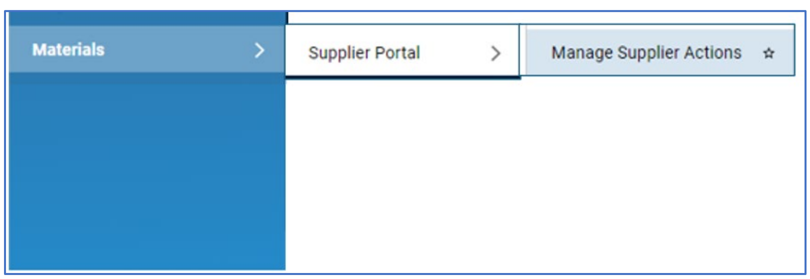
Introduction

As a Cadmus authorized Consultant/Supplier, you have been issued credentials to access the Cadmus ERP system (Deltek Costpoint) Supplier Portal. The Supplier Portal provides a centralized site to interact with Cadmus personnel responsible for issuing Purchase Orders (POs), reviewing issued POs, and submitting invoices to the Cadmus accounts payable team without the need to send multiple emails. This saves you time and expedites your invoice processing.
When a PO is issued to you, you receive an automated email from the Cadmus system describing the PO and a link to Cadmus Supplier portal where you can review the details of the issued PO.

View Issued Purchase Order(s)

Only use these instructions to view the assigned purchase orders and the remaining balance.
To review the issued PO(s) log-in to the Cadmus Supplier Portal using the credentials provided to you by the Cadmus IT team. Follow the steps below:

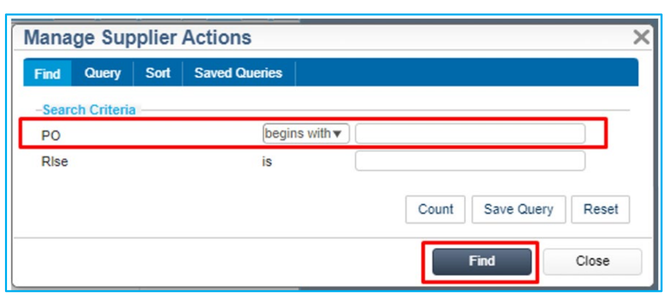
1. Navigate to https://costpoint.cadmusgroup.org/cpweb
2. Log in to the Cadmus Supplier Portal using credentials that were provided.
3. You are prompted to set up a new password after the first login.
4. Once logged in, click on the left panel, navigate to **Materials >> Supplier Portal >> Manage Supplier Actions**



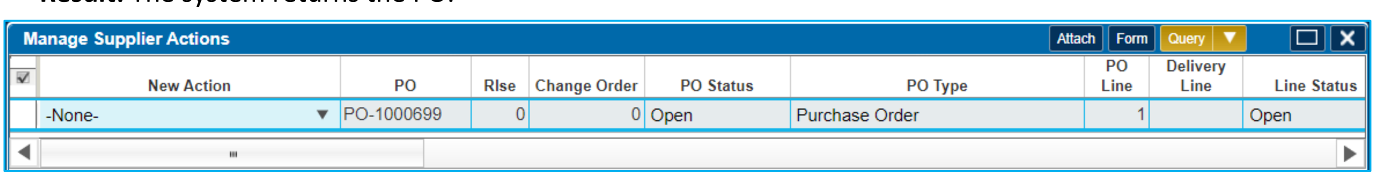
5. On the **Manage Supplier Actions Find** screen, in the field **PO**, enter the **PO #** provided to you via email.

   NOTE: The entry format is PO-10NNNNN

6. Click the button: **Find**



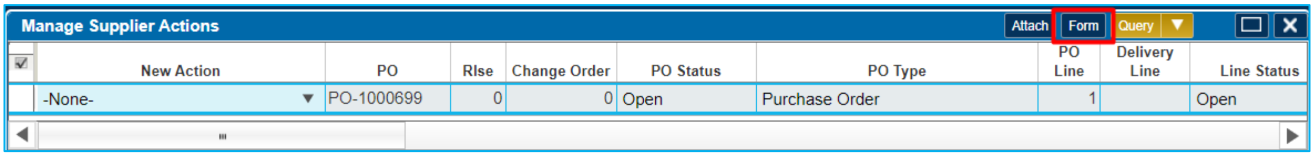
Result: The system returns the PO.



Manage Supplier Actions

	New Action	PO	Rlse	Change Order	PO Status	PO Type	PO Line	Delivery Line	Line Status
	-None-	PO-1000699	0	0	Open	Purchase Order	1		Open

7. To make the data easier to read, on the upper right of the toolbar, click on the button: **Form**



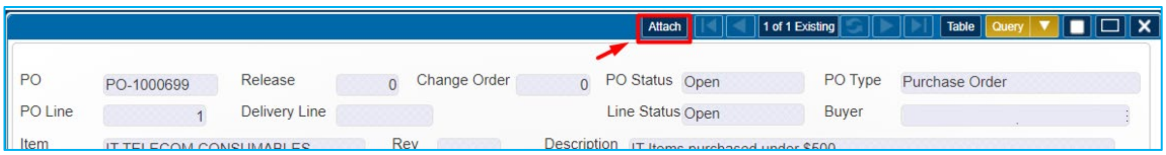
Result: The **Form** view displays. In the Form view, you can see the PO#, the total quantity ordered (Hrs.) and the total amount of the PO, along with the remaining balance on the PO (Open Amt).

Note: The balance displays after adding the total of all invoices against this PO.

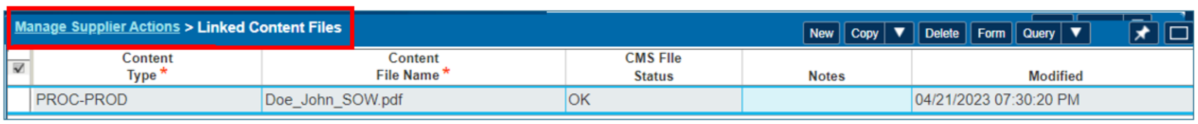
View Attachments to the PO

Only use the following to view attachments to a PO.

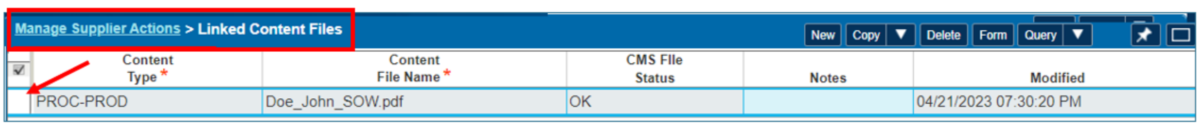
1. To view any attachment related to this record, at the top of the window, click: **Attach**.



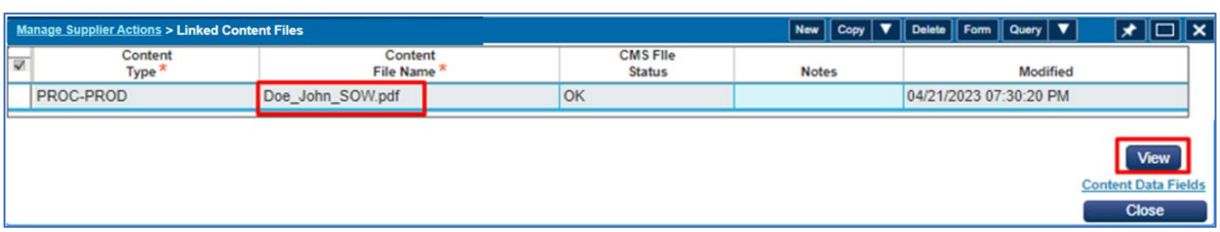
Result: If there any attachments related to this PO, they display in a new window near the bottom of the screen called **Manage Supplier Actions > Linked Content Files.** Note: The window will be blank if there are no attachments included in the PO.



2. To view an attachment, on the left, click the line box. This highlights/selects the row.



3. You may need to scroll down to view and click the button: **View** Note: In this case it is the Statement of Work.

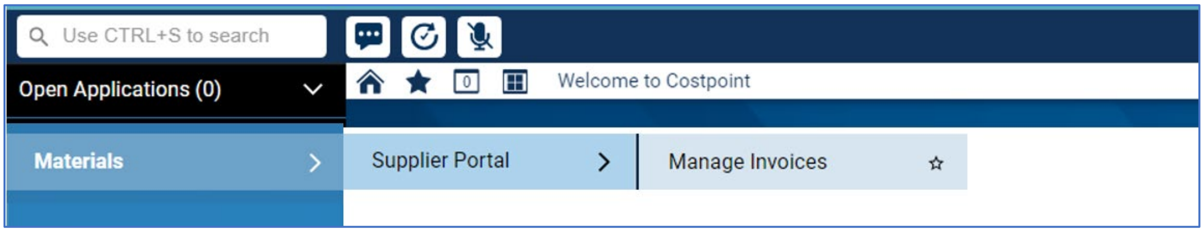


Result: Your web browser prompts you to download/open the file.

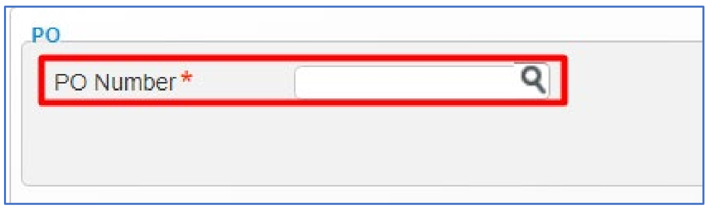
Submit an Invoice

Follow the steps below to submit an invoice to Cadmus for review, approval, and payment.

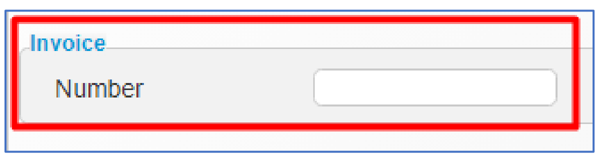
1. Use the credentials provided to you and log-in to the Cadmus Supplier Portal.
2. Navigate to: **Materials >> Supplier Portal >> Manage Invoices**



3. On the **Manage Invoices** screen, hover over the **PO Number** field and **click on the magnifying glass**.



4. On the left, **click the box to highlight/select** the desired PO you are billing to.
5. Click the button: **Select**
6. Under the **PO** field, in the **Invoice Number** field, **enter your invoice number.**



7. In the **Date** field, use the calendar icon to **select a date <u>in the previous month</u>**.
8. To populate all the line items associated with the PO to Invoice lines window, to the right, click the button: **Autoload**
   Result: At the bottom of the screen, the **Invoices Lines** screen populates.
9. With invoice lines populated, at the bottom of the table, in the field **Invoice Quantity (Inv Qty)** field, enter the hours to be invoiced.

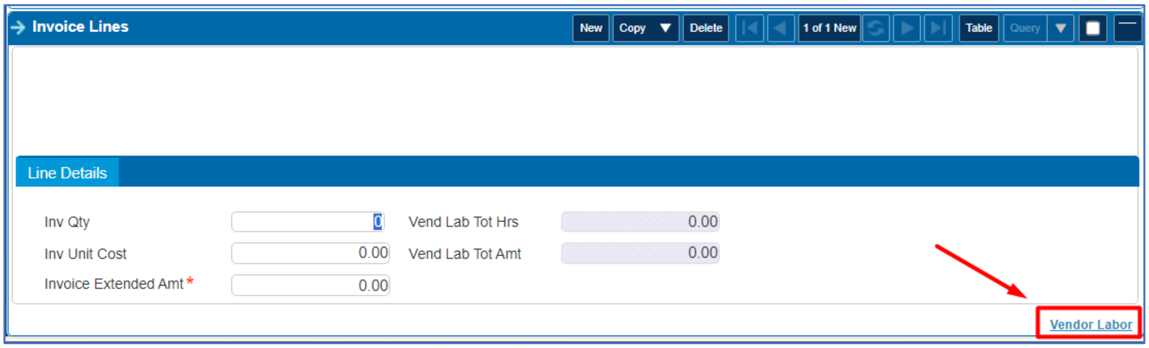
   Note: You can also click the button **Form** view to enter data.

10. On the keyboard, press the **Tab** key.
    Result: The **Invoice Amount** fields auto populated based on the agreed amount in the PO.
11. Proceed to the next section.

Consultant: Vendor Labor Enter Hours Worked

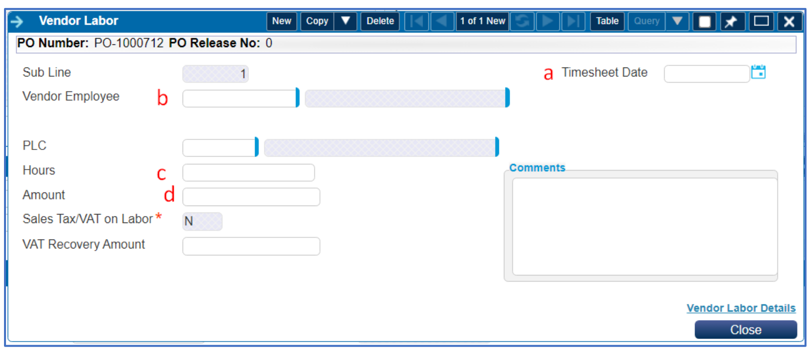
If you are a consultant, you must enter your hours into the system, follow these steps:

1. After completing the steps above, **Scroll down.**
2. On the screen **Invoice Lines**, **Line Details** in the lower right click the link: **Vendor Labor**



3. Click the button: **Form** view

4. Populate the following fields:
5.



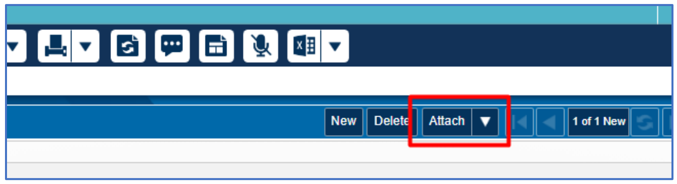
   a. **Timesheet Date** – use the calendar to select the end date of the service provided
   b. **Vendor Employee** – hover over the field and click the magnifying glass to **select your Vendor ID**
   c. **Hours** – enter the number of hours to match the number of hours on the invoice, on the keyboard, press: **Tab**
   Result: The field **Amount** auto calculates entering the **<u>total amount being billed</u>**
   NOTE: Make sure the total amount in the field is equal to the total invoice amount.

6. Click: **Close**
7. Proceed to the next section.

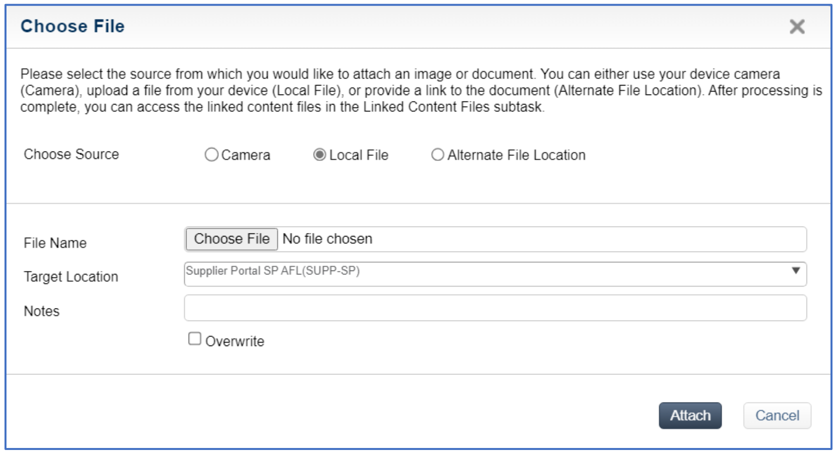
Attach a Document (invoice) to a Costpoint Record

Follow the steps below to attach an invoice to your invoice record.

1. On the **Manage Invoices** toolbar, On the right, click the button: **Attach**



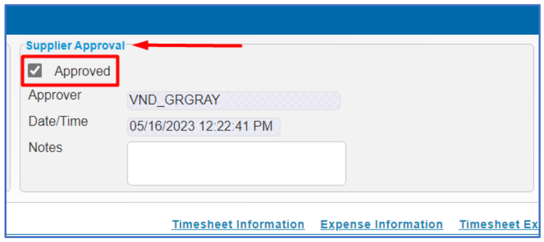
Result: The **Choose File** dialog box displays.



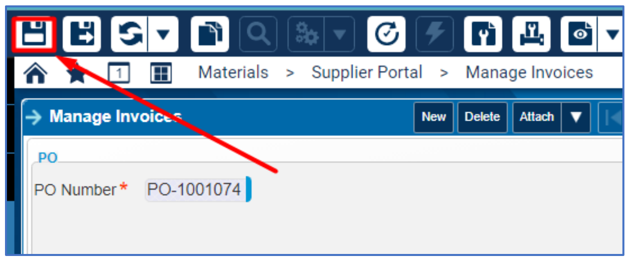
2. On the **Choose File** screen, if necessary, click on the radio button: **Local File**
3. Click the button: **Choose File**
4. Navigate to where your PDF invoice is located
5. Select the PDF invoice file.
6. Click: **Open**
7. In the lower right of the **Choose File** dialog box, click the button: **Attach**
   Result: At the bottom of the screen a notification displays once the selected file successfully uploads.
8. Proceed to the next section.

Submitting the Invoice

1. When you are ready to submit your invoice, in the **Supplier Approval** area, click the checkbox: **Approved**



2. In the **Notes** field, add any desired notes.
3. In the upper left of the window, click the button: **Save**



Result: You have successfully submitted your invoice.

4. Log out of the system, in the upper right, click the icon: 

With your invoice submitted, the Cadmus team is notified to review, approve, and process the invoice.

If you have any questions or run into any issues accessing the Supplier Portal, please contact the Cadmus Support Team at Support@cadmusgroup.com

Quick Checklist: Once you are familiar with the steps, use this checklist as a reference.

If you wish to View Purchase Orders

1. Log in.
2. Click: **Materials >> Suppler Portal >> Manager Supplier Actions**
3. In the **PO field**, **enter the issued PO number** (PO-10NNNN).
4. Click: **Find**
5. If necessary to easily view the PO info., click the button: **Form**

If you wish to View Attachments

1. After accessing the PO, click the button: **Attach**
2. In the area **Linked Content Files**, on the left, **click the row to highlight**
3. Scroll down, click: **View**
4. To view the attachment, open the file downloaded to your browser.

Submit an Invoice

1. Log in.
2. Navigate to **Materials >> Supplier Portal >> Manage Invoices**
3. Hover over the field **PO** and **click the magnifying glass**, **highlight/select the PO.**
4. In the field, **Invoice Number**, enter your invoice information.
5. In the **Date** field, use the dropdown to **select the date of the Invoice**.
6. Click: **Autoload**
7. At the bottom in the **Line Details** area**,** in the field, **Inv Qty**, enter the **Hours value**.
8. Press: **Tab**

Enter Vendor Labor Hours Worked

1. On the screen **Invoice Lines**, in the lower right select: **Vendor Labor**
2. Click: **Form view**
3. Enter: **Timesheet Date, Vendor Employee, Hours** (this is the Total Amount)
4. Click: **Close**

Attach an Invoice

1. On the **Manage Invoices** menu, click: **Attach**
2. On the **Choose File** screen, if necessary, click the radio button: **Local File**
3. Click: **Choose File**
4. Select the file, enter a description.
5. In the **Alternative File Location** field, verify the location is: **Supplier Portal SP AFL(SUPP-SP)**
6. Click: **Attach**

Submitting the Invoice and Log Out

1. In the **Supplier Approval** area, **click the checkbox: Approved**
2. Enter any desired **Notes** (optional).
3. In the most upper left of the screen click the button: **Save**
4. Log out of the system.