



User Guide

Supplier Portal

v1.9

June 7, 2023

Version History

Date	Version	Revision Description	Author
4/1/2020	v1.0	Original copy from training	Inoapps
6/3/2020	v1.1	Added additional language to the “Create Invoice with PO” section around adjusting payment amounts and calculating taxes.	ETRN
11/4/2020	v1.2	Removed “Create PO w/o Invoice” section; modify language around tax calculation and invoice attachment.	ETRN
11/18/2020	v1.3	Clarified language around populating the Line Items of the invoice from the PO.	ETRN
1/19/2021	v1.4	Modified language around requiring attachments for invoice submission and tax calculation.	ETRN
1/28/2022	v1.5	Updated the “Create Invoice with PO section.”	ETRN
2/3/2022	v1.6	Updated the “Create Invoices with PO section” to include how to address tax issues. Added the following sections: Cancel an Invoice with an Incomplete Status	ETRN
8/2/2022	v1.7	Added the following section: Support Email Address for Issues. Reformatted the following sections: Respond to Negotiation; Manage Supplier Messages.	ETRN
2/13/2023	v1.8	Added the following section: Submit a Change Request to Your Profile to Update Supplier Name, Address, EIN, and/or Tax Classification (W-9 Related Changes)	ETRN
6/7/2023	v1.9	Updated the View Purchase orders section. Added the following sections: Supplier Portal Link & Tips; View Invoice Status; and View Payment Status	ETRN

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1. Supplier Portal

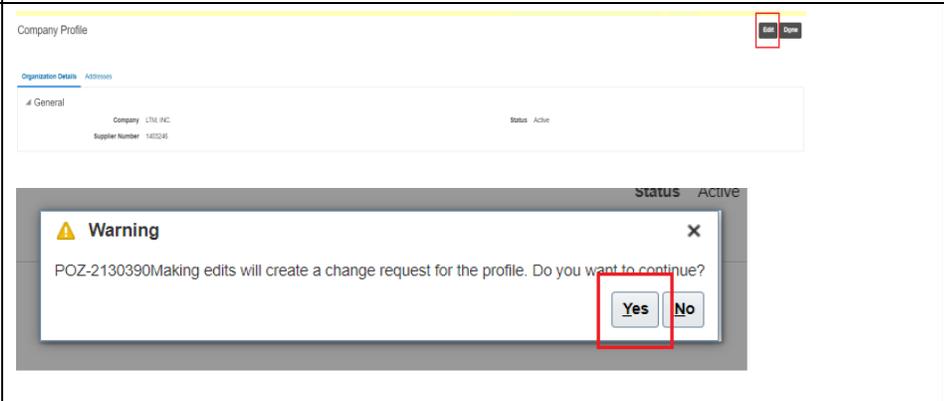
1.1 Weblink

<https://ejeo.login.us6.oraclecloud.com>

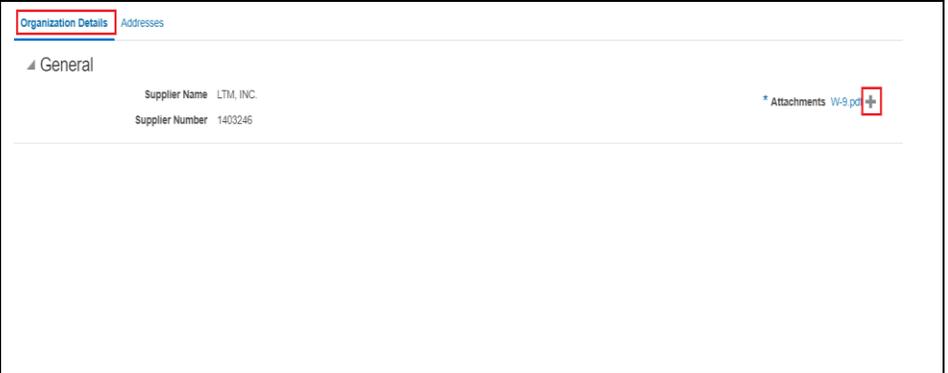
1.2 Tips

- Use Google Chrome or Firefox internet browsers. Using non-recommended browsers may result in a loss of links, icons, or functionality. Be sure to bookmark the link.
- Invoices cannot be edited once submitted but can be canceled by our AP Department. Email them at AP@equitransmidstream.com
- For general questions or technical issues, send an email to SupplierCommunication@equitransmidstream.com
- If you have an issue with a PO, such as with the calculated tax, contact the Sourcing Agent named on the PO.

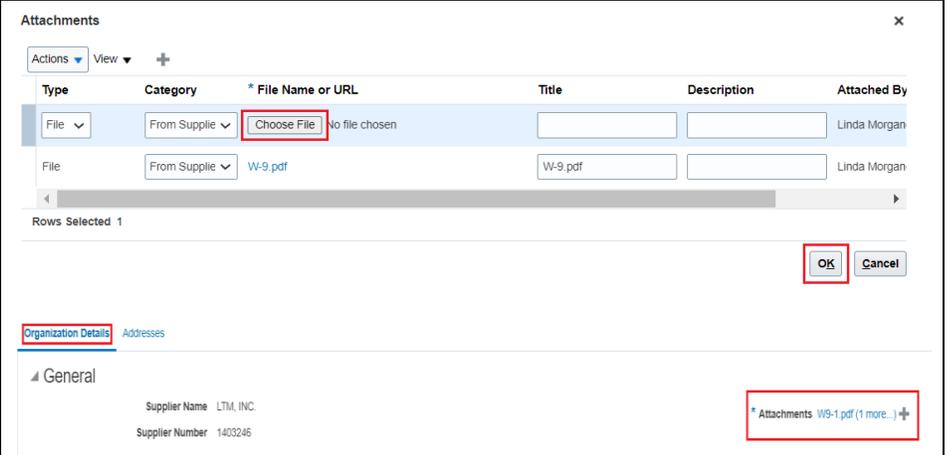
1.3 Submit a Change Request to Your Profile to Update Supplier Name, Address, EIN, and/or Tax Classification (W-9 Related Changes)

<p>1. Go to Home page click on Supplier Portal</p>	
<p>2. Go to Tasks on left side of the Supplier Portal page and click on the Manage Profile link.</p>	
<p>3. Click on Edit. A warning message will be displayed stating you will create a change request. Click on Yes.</p>	
<p>4. Click on the Organizations Details tab. In the text box, enter your change request for any changes to Supplier Name, Address, EIN, or Tax Classification.</p>	

5. In the **Organizations Details** tab, attach a completed W-9 to the **Attachments** field by clicking on the “+” sign.
 NOTE: You may see previous versions of your W-9s stored in the Attachment field.

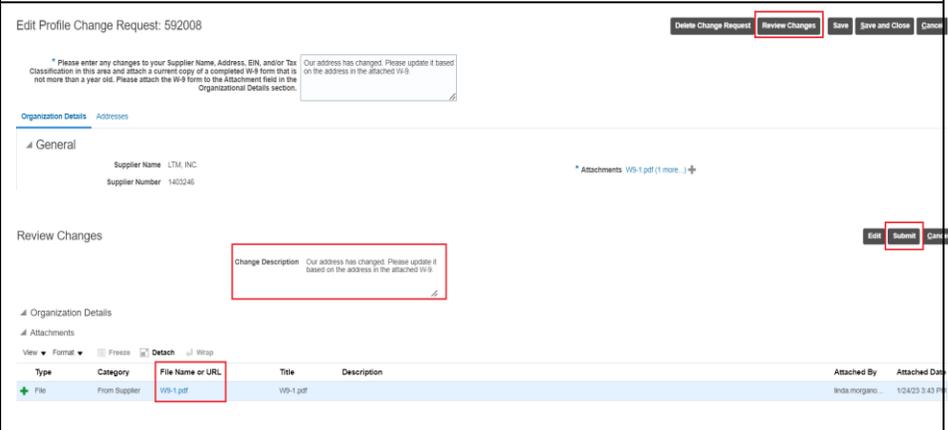


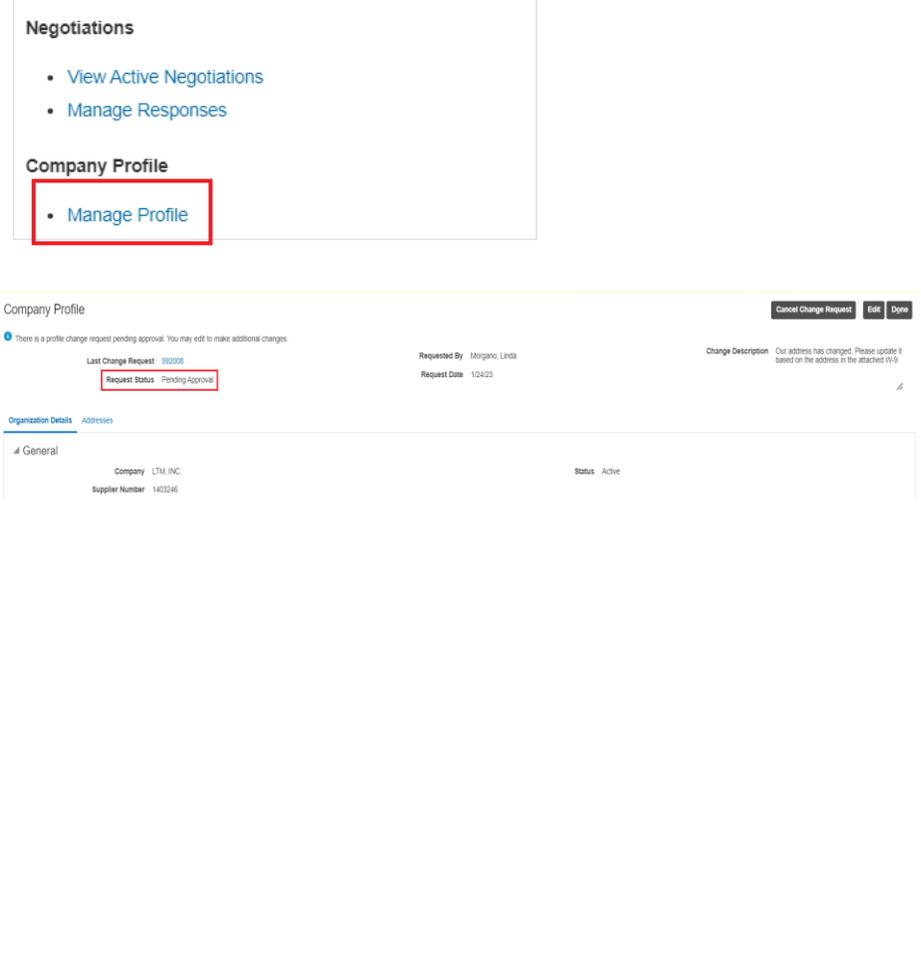
6. Click on **Choose File** and select the W-9 from your files. Click **OK** after the W-9 has been added.
 NOTE: In this example, there was a previous W-9 stored in the Attachment field so it will be displayed along with the new W-9 that was attached.



YOU MUST ATTACH A CURRENT W-9 OTHERWISE OUR COMPANY WILL SEND YOU AN EMAIL REJECTING THE CHANGE REQUEST AND ASK THAT YOU RESUBMIT A NEW CHANGE REQUEST WITH A W-9 ATTACHED.

7. After the W-9 has been attached, click on **Review Changes**. Ensure that your change description is correct, and your W-9 is attached. Click **Submit**.



<p>8. A confirmation window will pop up showing that your Change Request has been submitted for approval. Click on Ok and Done to exit.</p>	 <p>A confirmation dialog box with a green checkmark icon and the title "Confirmation". The text inside reads: "Your profile change request 592008 was submitted for approval." There is an "OK" button at the bottom right.</p>
<p>9. To double check the Change Request that you submitted, click on Manage Profile link under Tasks.</p> <p>If the Change Request has not been Processed by ETRN, it will still have a Request Status of Pending Approval.</p> <p>NOTE: If you need to edit the pending Change Request, click on Edit and the system will prompt you to make your changes. If you need to cancel the pending Change Request, click on Cancel Change Request and the system will prompt you to cancel the request.</p>	 <p>The screenshot shows the "Negotiations" section with links for "View Active Negotiations" and "Manage Responses". Below it is the "Company Profile" section with a "Manage Profile" link highlighted by a red box. The main content area shows a "Company Profile" card with a warning message: "There is a profile change request pending approval. You may edit to make additional changes." The "Request Status" is "Pending Approval", highlighted by a red box. Other details include "Requested By: Margaro, Linda" and "Request Date: 1/24/23". The "Organization Details" section shows "Company: LTM, INC." and "Supplier Number: 1433246".</p>
<p>10. If the Change Request was approved or rejected by our company, you will see a Notification by clicking on the Bell icon. You will also receive an email.</p>	 <p>The top part shows a navigation bar with a bell icon highlighted by a red box and a notification badge with the number "1". Below it is a "Notifications" card with a "Show All" link. The notification text reads: "FYI Supplier Profile Change Request 592008 was Approved by Equitrans Midstream Corporation" and "3 minutes ago". There is a "Dismiss" button at the bottom right.</p>

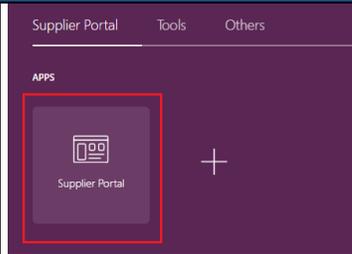
You can also see the status of the Change Request by clicking on **Manage Profile** Under **Tasks**. You will land on the **Company Profile** page and the **Request Status** will display as **Processed**.

NOTE: IF YOU FORGOT TO ATTACH THE W-9, THE CHANGE REQUEST WILL BE REJECTED AND YOU WILL RECEIVE AN EMAIL REQUESTING THAT YOU SUBMIT A NEW CHANGE REQUEST WITH AN ATTACHED W-9.

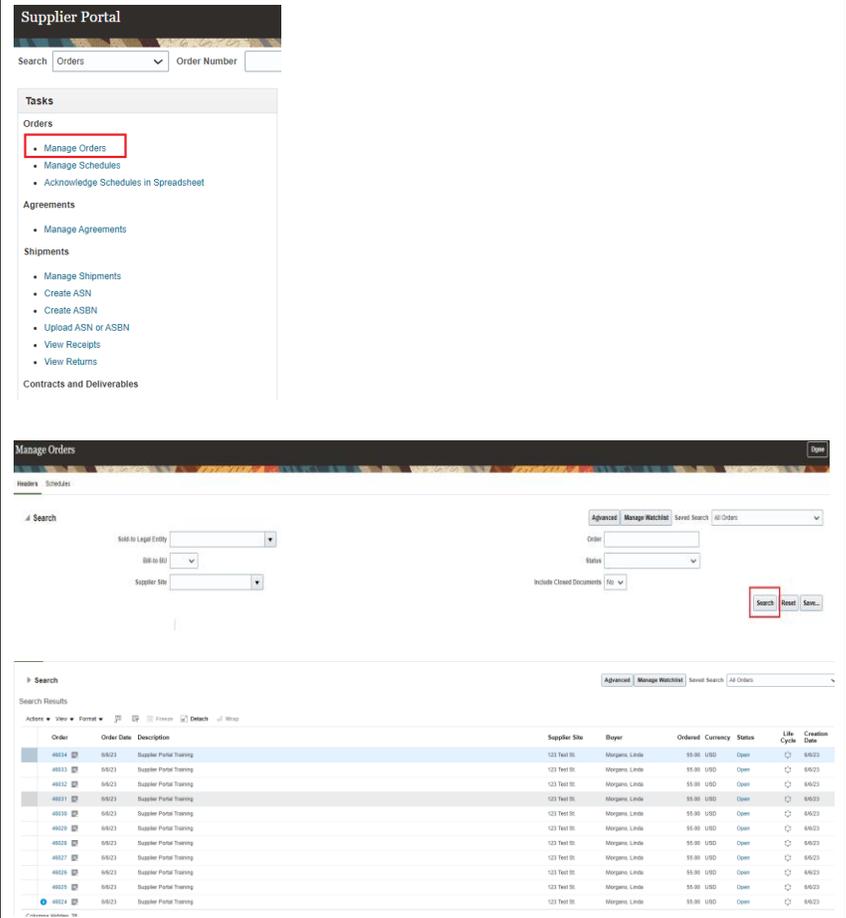
The screenshot displays the 'Company Profile' page in the Supplier Portal. At the top, there are two sections: 'Negotiations' with links for 'View Active Negotiations' and 'Manage Responses', and 'Company Profile' with a link for 'Manage Profile' which is highlighted with a red box. Below these is a 'Company Profile' header with 'Edit' and 'Done' buttons. The main content area shows 'Last Change Request' as 550006, 'Request Status' as 'Processed' (highlighted with a red box), 'Requested By' as 'Morgano, Linda', and 'Request Date' as '1/24/23'. A 'Change Description' note states: 'Our address has changed. Please update it based on the address in the attached W-9.' At the bottom, there are tabs for 'Organization Details' and 'Addresses'.

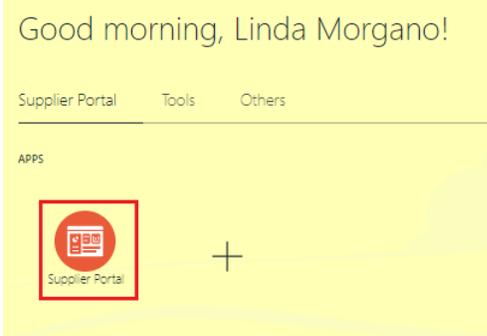
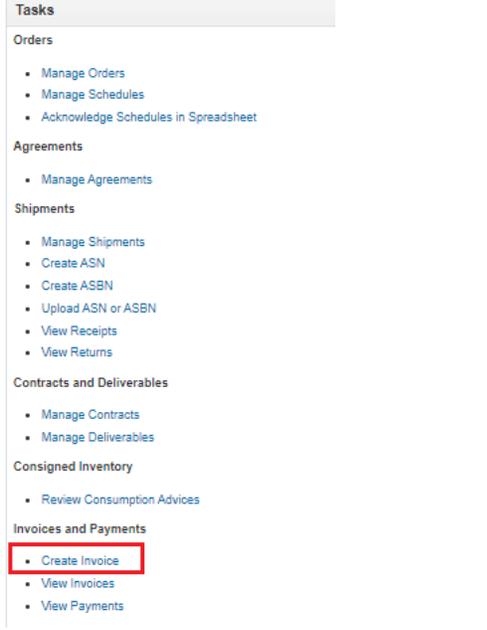
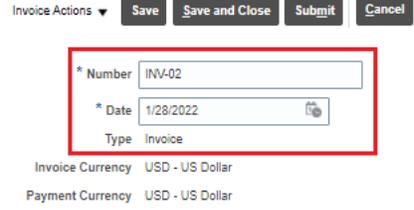
1.4 View Purchase Orders (POs)

- Go to Home page click on **Supplier Portal**



- Under **Tasks->Orders->Click on Manage Orders**
On the **Manage Orders** screen, you can do a blind search and leave all the fields blank and click on **Search** and this will retrieve all your Open POs. To narrow down your results, you can enter information in any of the fields.



1.5 Create Invoice for a PO	
<p>2. Click on Supplier Portal from the Supplier Portal Home page.</p>	
<p>3. Select Create Invoice from the Supplier Portal Tasks list.</p>	
<p>4. Enter PO number in the Identifying PO field. PO number will fetch supplier, supplier site, and other details from the PO.</p>	
<p>5. Enter the Invoice Number and Date (must be present or future date; cannot be a past date). Type must be “Invoice.”</p>	

<p>6. All invoices require an attachment of supporting documentation. Click on the “+” icon to add an attachment with Category of “Approver.” Verify the other details and proceed to the Lines section.</p>																																																				
<p>7. Click on the Tablet icon to retrieve the PO line details.</p>	<table border="1"> <thead> <tr> <th colspan="2">Purchase Order</th> <th colspan="2">Consumption Advice</th> <th>Supplier Item</th> <th>It</th> </tr> <tr> <th>* Number</th> <th>* Type</th> <th>* Number</th> <th>* Line</th> <th>* Schedule</th> <th>Number</th> <th>Line</th> </tr> </thead> <tbody> <tr> <td colspan="7">No data to display.</td> </tr> <tr> <td colspan="7" style="text-align: center;">Total</td> </tr> </tbody> </table>	Purchase Order		Consumption Advice		Supplier Item	It	* Number	* Type	* Number	* Line	* Schedule	Number	Line	No data to display.							Total																														
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<p>8. Highlight the line(s) that you want to invoice against; click Apply and Ok.</p>																																																				
<p>9. Scroll to the right to see the amount on the line(s) that you want to invoice against. You can adjust the quantity or amount you are invoicing to allow for partial or full payment, however you can NOT enter a quantity or amount that exceeds the ordered or balance line amount.</p>	<table border="1"> <thead> <tr> <th>* Number</th> <th>Type</th> <th>Purchase Order</th> <th>Consumption Advice</th> <th>Supplier Item</th> <th>Item Description</th> <th>Ship-to Location</th> <th>Tax Classification</th> <th>Available Quantity</th> <th>Quantity</th> <th>Unit Price</th> <th>UOM</th> <th>* Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Item</td> <td>27579</td> <td>2</td> <td>1</td> <td>Port-a-John service</td> <td>Rager Mountain</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>40.00</td> </tr> <tr> <td colspan="12" style="text-align: center;">Total</td> </tr> </tbody> </table>	* Number	Type	Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	1	Item	27579	2	1	Port-a-John service	Rager Mountain						40.00	Total																								
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<p>10. To add Freight, click on the “+” icon in the Lines section. Select “Freight” from the drop-down menu; add freight amount in the Amount field.</p>	<table border="1"> <thead> <tr> <th>* Number</th> <th>Type</th> <th>Purchase Order</th> <th>Consumption Advice</th> <th>Supplier Item</th> <th>Item Description</th> <th>Ship-to Location</th> <th>Tax Classification</th> <th>Available Quantity</th> <th>Quantity</th> <th>Unit Price</th> <th>UOM</th> <th>* Amount</th> </tr> </thead> <tbody> <tr> <td>3</td> <td>Freight</td> <td></td> <td>5.00</td> </tr> <tr> <td>1</td> <td>Item</td> <td>27579</td> <td>2</td> <td>1</td> <td>Port-a-John service</td> <td>Rager Mountain</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>40.00</td> </tr> <tr> <td colspan="12" style="text-align: center;">Total</td> </tr> </tbody> </table>	* Number	Type	Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	3	Freight											5.00	1	Item	27579	2	1	Port-a-John service	Rager Mountain						40.00	Total											
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11. Before submitting the Invoice, you MUST click on **Calculate Tax** from the **Invoice Actions** menu to pull any tax amounts from the PO. If taxes are applied to the line item(s), they will appear in the **Summary Tax Lines** section.

- **If you believe there is a discrepancy with the calculated tax amount or the taxability status, please Cancel the Invoice and contact the Sourcing Agent. To Cancel the Invoice, click on Invoice Actions, Cancel Invoice, OK, and Cancel. This will give your Invoice a status of "Canceled" thus allowing the Sourcing Agent to make changes to the PO.**

- **If there is not a tax issue, click on the **Submit** button to submit the Invoice. Click on **Done**.**

Invoice Actions ▾ Save Save and Close Submit Cancel

Calculate Tax Ctrl+Alt+X

Cancel Invoice

Delete Invoice

Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

Summary Tax Lines

Line	Regime	Tax Name	Tax Jurisdiction	Tax Status	Rate Name	Percentage	Per Unit	Amount
1	ETRN_SALES_AN...	ETRN US COUNTY TA	CO-PA-CAMBRIA	Standard	CO-PA-CAMBRIA	0		0
2	ETRN_SALES_AN...	ETRN US STATE TAX	ST-PA	Standard	ST-PA	6		2.4

*****IF THERE IS A TAX ISSUE*****

Invoice Actions ▾ Save Save

Calculate Tax Ctrl+Alt+X

Cancel Invoice

Delete Invoice

Warning

You can't update the invoice number or reuse the number once it's canceled. Do you want to continue and cancel the invoice?

OK Cancel

Invoice Actions ▾ Save Save and Close Submit Cancel

*****IF THERE IS NOT A TAX ISSUE*****

Invoice Actions ▾ Save Save and Close Submit Cancel

* Number INV-02

Date 1/28/22

Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

Printable Page Done

12. Confirm that the Invoice was submitted and has a status of **“In process”** by looking in the **View Invoices** section.

Go back to the **Tasks** list and click on **View Invoices**.

Tasks

- Orders
 - Manage Orders
 - Manage Schedules
 - Acknowledge Schedules in Spreadsheet
- Agreements
 - Manage Agreements
- Shipments
 - Manage Shipments
 - Create ASN
 - Create ASBN
 - Upload ASN or ASBN
 - View Receipts
 - View Returns
- Contracts and Deliverables
 - Manage Contracts
 - Manage Deliverables
- Consigned Inventory
 - Review Consumption Advises
- Invoices and Payments
 - Create Invoice
 - View Invoices**
 - View Payments

13. Enter, or pull up, your Supplier Name in the **Supplier** field and click on **Search**.

View Invoices

Search

Supplier: LTM, INC

Supplier Site

Consumption Advice

Invoice Status

Paid Status

Payment Number

Search Reset Done

14. All invoices you submitted will show in the **Search Results** section with details such as **Invoice Status, Paid Status**, etc.

If you do not see the **Paid Status** column, click on **View, Columns**, and the **Paid Status** checkbox to add it to the **Search Results** table.

Search Results

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Paid Status
INV03	2/1/22	Standard	27579	LTM, INC	125 Fairmount S	9.42 USD	9.42 USD	In process	Unpaid
INV3	2/1/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Cancelled	Unpaid
INV4	2/1/22	Standard	27579	LTM, INC	125 Fairmount S	12.50 USD	12.50 USD	In process	Unpaid
INV01	1/28/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Cancelled	Unpaid
INV02	1/28/22	Standard	27579	LTM, INC	125 Fairmount S	47.40 USD	47.40 USD	In process	Unpaid

transHUB

View Invoices

Search

View

Columns

- Show All
- Comments
- Payment Number
- Paid Status**
- Invoice Status
- Invoice Amount
- Unpaid Amount
- Supplier Site
- Supplier
- Due Date
- Purchase Order
- Type
- Invoice Date
- Invoice Number
- Manage Columns...

Search Results

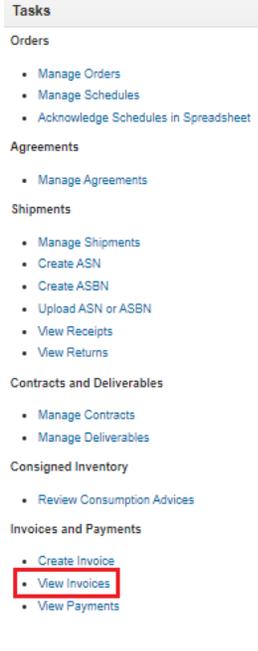
Supplier	Invoice Number	Type
Standard	27579	Standard

1.6 Cancel an Invoice with an "Incomplete" Status

2. If you were in the process of creating an Invoice and you **Saved** or **Canceled** it due to an issue with the associated PO that needs to be resolved such as taxes, then the Invoice will have a status of **"Incomplete."**
3. When an Invoice has an **"Incomplete"** status, Equitrans Midstream cannot edit the associated PO so Suppliers will need to take additional steps to change the **Invoice** status from **"Incomplete"** to **"Canceled."**
4. Click on **Supplier Portal** from the Supplier Portal Home page.



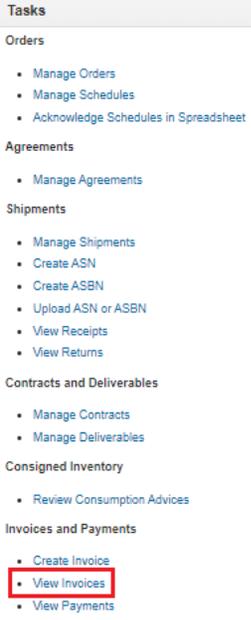
5. Select **View Invoices** from the Supplier Portal **Tasks** list.



6. Enter, or pull up, your Supplier Name in the **Supplier** field and click on **Search**.



<p>7. All Invoices you submitted will show in the Search Results section with details such as Invoice Status, Paid Status, etc.</p>	<p>Search Results</p> <table border="1"> <thead> <tr> <th>Invoice Number</th> <th>Invoice Date</th> <th>Type</th> <th>Purchase Order</th> <th>Supplier</th> <th>Supplier Site</th> <th>Unpaid Amount</th> <th>Invoice Amount</th> <th>Invoice Status</th> <th>Paid Status</th> <th>Payment Number</th> </tr> </thead> <tbody> <tr><td>INV-001</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td><td>Unpaid</td><td></td></tr> <tr><td>INV-002</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td><td>Unpaid</td><td></td></tr> <tr><td>INV-003</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>USD</td><td>10.60 USD</td><td>Incomplete</td><td>Unpaid</td><td></td></tr> <tr><td>INV-004</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>USD</td><td>5.30 USD</td><td>Incomplete</td><td>Unpaid</td><td></td></tr> <tr><td>INV-8</td><td>2/3/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td><td>Unpaid</td><td></td></tr> <tr><td>INV-9</td><td>2/3/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>2.65 USD</td><td>2.65 USD</td><td>In process</td><td>Unpaid</td><td></td></tr> <tr><td>INV-5</td><td>2/2/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td><td>Unpaid</td><td></td></tr> </tbody> </table>	Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Paid Status	Payment Number	INV-001	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	Unpaid		INV-002	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	Unpaid		INV-003	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	USD	10.60 USD	Incomplete	Unpaid		INV-004	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	USD	5.30 USD	Incomplete	Unpaid		INV-8	2/3/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	Unpaid		INV-9	2/3/22	Standard	27579	LTM, INC	125 Fairmount S	2.65 USD	2.65 USD	In process	Unpaid		INV-5	2/2/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	Unpaid	
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<p>8. Click on the Invoice number that has an Invoice Status of "Incomplete."</p>	<p>Search Results</p> <table border="1"> <thead> <tr> <th>Invoice Number</th> <th>Invoice Date</th> <th>Type</th> <th>Purchase Order</th> <th>Supplier</th> <th>Supplier Site</th> <th>Unpaid Amount</th> <th>Invoice Amount</th> <th>Invoice Status</th> </tr> </thead> <tbody> <tr><td>INV-001</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td></tr> <tr><td>INV-002</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td></tr> <tr><td>INV-003</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>USD</td><td>10.60 USD</td><td>Incomplete</td></tr> <tr><td>INV-004</td><td>2/3/22</td><td>Standard</td><td>27584</td><td>LTM, INC</td><td>125 Fairmount S</td><td>USD</td><td>5.30 USD</td><td>Incomplete</td></tr> <tr><td>INV-8</td><td>2/3/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td></tr> <tr><td>INV-9</td><td>2/3/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>2.65 USD</td><td>2.65 USD</td><td>In process</td></tr> <tr><td>INV-5</td><td>2/2/22</td><td>Standard</td><td>27579</td><td>LTM, INC</td><td>125 Fairmount S</td><td>0.00 USD</td><td>0.00 USD</td><td>Canceled</td></tr> </tbody> </table>	Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	INV-001	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	INV-002	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	INV-003	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	USD	10.60 USD	Incomplete	INV-004	2/3/22	Standard	27584	LTM, INC	125 Fairmount S	USD	5.30 USD	Incomplete	INV-8	2/3/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled	INV-9	2/3/22	Standard	27579	LTM, INC	125 Fairmount S	2.65 USD	2.65 USD	In process	INV-5	2/2/22	Standard	27579	LTM, INC	125 Fairmount S	0.00 USD	0.00 USD	Canceled																
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<p>9. Highlight the line item that was pulled into the Invoice from the associated PO; click on Cancel Line. The Amount will change to zero. You must do this for each line pulled in from the PO.</p>	<p>Lines</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Type</th> <th>Purchase Order</th> <th>Consumption Advice</th> <th>Supplier Item</th> <th>Item Description</th> <th>Ship to Location</th> <th>Tax Classification</th> <th>Available Quantity</th> <th>Quantity</th> <th>Unit Price</th> <th>UOM</th> <th>* Amount</th> </tr> </thead> <tbody> <tr><td>1</td><td>INV</td><td>27584</td><td>2</td><td>1</td><td>Port-a-John service</td><td>Upper Merion</td><td></td><td></td><td></td><td></td><td></td><td>10.60</td></tr> <tr><td colspan="12">Total</td><td>10.60</td></tr> </tbody> </table> <p>Lines</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Type</th> <th>Purchase Order</th> <th>Consumption Advice</th> <th>Supplier Item</th> <th>Item Description</th> <th>Ship to Location</th> <th>Tax Classification</th> <th>Available Quantity</th> <th>Quantity</th> <th>Unit Price</th> <th>UOM</th> <th>* Amount</th> </tr> </thead> <tbody> <tr><td>1</td><td>INV</td><td>27584</td><td>2</td><td>1</td><td>Port-a-John service</td><td>Upper Merion</td><td></td><td></td><td></td><td></td><td></td><td>0.00</td></tr> <tr><td colspan="12">Total</td><td>0.00</td></tr> </tbody> </table>	Number	Type	Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	1	INV	27584	2	1	Port-a-John service	Upper Merion						10.60	Total												10.60	Number	Type	Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	1	INV	27584	2	1	Port-a-John service	Upper Merion						0.00	Total												0.00										
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<p>10. Click on Invoice Actions, Cancel Invoice, Ok, and Cancel.</p>	<p>Invoice Actions ▾ Save Save</p> <ul style="list-style-type: none"> Calculate Tax Ctrl+Alt+X Cancel Invoice Delete Invoice <p>Warning</p> <p>You can't update the invoice number or reuse the number once it's canceled. Do you want to continue and cancel the invoice?</p> <p>OK Cancel</p> <p>Invoice Actions ▾ Save Save and Close Submit Cancel</p>																																																																																								

<p>11. Confirm that the Invoice has a status of “Canceled” by looking in the View Invoices section. Go back to the Tasks list and click on View Invoices.</p>	 <p>Tasks</p> <p>Orders</p> <ul style="list-style-type: none"> Manage Orders Manage Schedules Acknowledge Schedules in Spreadsheet <p>Agreements</p> <ul style="list-style-type: none"> Manage Agreements <p>Shipments</p> <ul style="list-style-type: none"> Manage Shipments Create ASN Create ASBN Upload ASN or ASBN View Receipts View Returns <p>Contracts and Deliverables</p> <ul style="list-style-type: none"> Manage Contracts Manage Deliverables <p>Consigned Inventory</p> <ul style="list-style-type: none"> Review Consumption Advices <p>Invoices and Payments</p> <ul style="list-style-type: none"> Create Invoice View Invoices View Payments 																																																																								
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1.7 Create Credit Memo

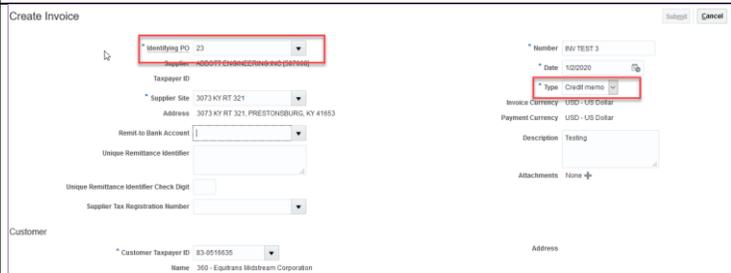
2. From Supplier Portal click on the supplier portal.



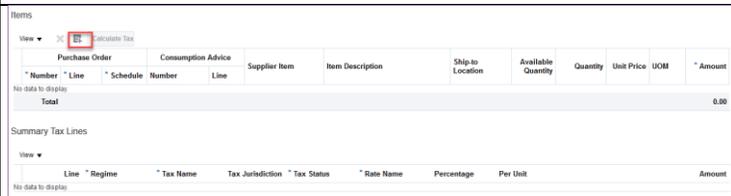
3. Select "Create Invoice"



4. Enter the PO, verify that the Supplier & Supplier site details are defaulted



5. Click on the Tablet icon to add the Line items from the PO to which Credit memo is to be raised



6. Search for the line to be added to the Invoice

Select and Add: Purchase Orders

Search Advanced Saved Search

** Purchase Order 23 ** At least one is required

** Creation Date m/d/yyyy h:mm a ** Consumption Advice

Search Reset Save...

Search Results

View Detach

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Ordered
Number	Line	Schedule	Number	Line	Number			
23	2	1				Left Hand Receiver	Southpointe	10.00

Apply OK Cancel

7. Observe that the line amount added as credit

Items Calculate Tax

Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship-to Location	Available Quantity	Quantity	Unit Price	UOM	* Amount
Number	Line	Schedule	Number	Line					
23	2	1							-10.00
Total									-10.00

8. Verify and submit the Credit Memo

transHUB Submit Cancel

Create Invoice

Identifying PO 23 * Number INV TEST 3

Supplier ABBOTT ENGINEERING INC (587008) * Date 1/22/2020

Taxpayer ID Type Credit memo

Supplier Site 3073 KY RT 321 Invoice Currency USD - US Dollar

Address 3073 KY RT 321 PRESTONSBURG, KY 41653 Payment Currency USD - US Dollar

Remit to Bank Account Description Testing

Unique Remittance Identifier Attachments None

Unique Remittance Identifier Check Digit

Supplier Tax Registration Number

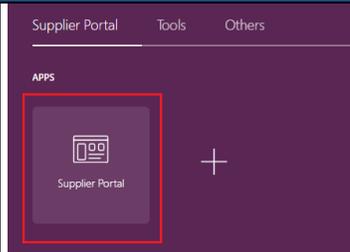
Customer

Customer Taxpayer ID 83-0519630 Address

Name 360 - Equitrans Midstream Corporation

1.8 View Invoice Status

1. Go to Home page click on **Supplier Portal**.



2. Under **Tasks->Invoices and Payments**
->Click on **View Invoices**

On the **View Invoices** screen, enter your Supplier Name in the **Supplier** field, click **Search**. This will retrieve all Invoices (submitted, canceled, incomplete). To narrow down your results, you can enter information in any of the fields.

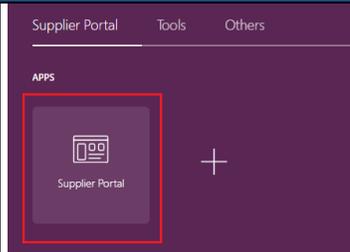
If you would like to see additional details in the **Search Results** section, click on **View->Columns** and check any field you want to add to the table.

The screenshot displays the 'View Invoices' application. On the left, a 'Tasks' sidebar lists various functions, with 'View Invoices' highlighted by a red box. The main content area is titled 'View Invoices' and contains a search form with fields for Invoice Number, Supplier (with a dropdown menu), Supplier Site, and Purchase Order. To the right are fields for Consumption Address, Invoice Status, Paid Status, and Payment Number. A 'Search' button is located at the bottom right of the search form. Below the search form, the 'Search Results' section shows a table with the following data:

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Invoice Amount	Invoice Status	Paid Status	Unpaid Amount	Payment Number	Comments
881-01	8/1/23	Standard	48233	L763 Inc	123 Test St	57.80 USD	Approved	Paid	0.00 USD	Multiple	
881-02	8/1/23	Standard	48233	L763 Inc	123 Test St	16.50 USD	Approved	Paid	0.00 USD	Multiple	
881-03	8/1/23	Standard	48237	L763 Inc	123 Test St	12.70 USD	Approved	Paid	0.00 USD	Multiple	
881-04	8/1/23	Standard	48238	L763 Inc	123 Test St	24.40 USD	In process	Unpaid	24.40 USD		

1.9 View Payment Status

- Go to Home page click on **Supplier Portal**.



- Under **Tasks->Invoices and Payments**
 ->Click on **View Payments**
 On the **View Payments** screen, enter your Supplier Name in the **Supplier** field, click **Search**. This will retrieve the payment status for submitted Invoices. To narrow down your results, you can enter information in any of the fields. If you would like to see additional details in the **Search Results** section, click on **View->Columns** and check any field you want to add to the table.

Tasks

Orders

- Manage Orders
- Manage Schedules
- Acknowledge Schedules in Spreadsheet

Agreements

- Manage Agreements

Shipments

- Manage Shipments
- Create ASN
- Create ASBN
- Upload ASN or ASBN
- View Receipts
- View Returns

Contracts and Deliverables

- Manage Contracts
- Manage Deliverables

Consigned Inventory

- Review Consumption Advices

Invoices and Payments

- Create Invoice
- View Invoices
- **View Payments**

View Payments

Search

Payment Number:

Payment Status:

Payment Amount:

Supplier:

Supplier Site:

Payment Date:

Search Results

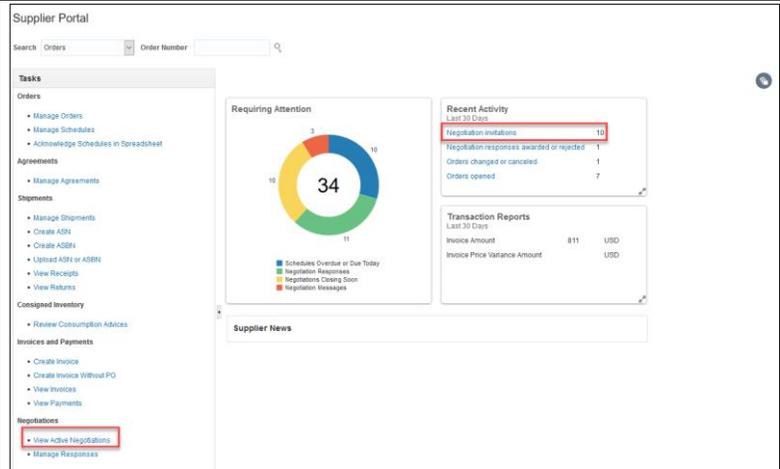
Payment Number	Payment Date	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Search to Account
2020	01/03	INV-01	LTM, Inc	103 Truck St.	66,20 USD	Voided	X000007890
2020	01/03	INV-01	LTM, Inc	103 Truck St.	67,80 USD	Notpaid	X000007890
2020	01/03	INV-02	LTM, Inc	103 Truck St.	16,70 USD	Notpaid	X000007890
2020	01/03	INV-03	LTM, Inc	103 Truck St.	12,70 USD	Notpaid	X000007890

1.10 Respond to Negotiation

1. Login as Supplier to respond to the RFQ document published by the Buyer. Click on **Supplier Portal**.



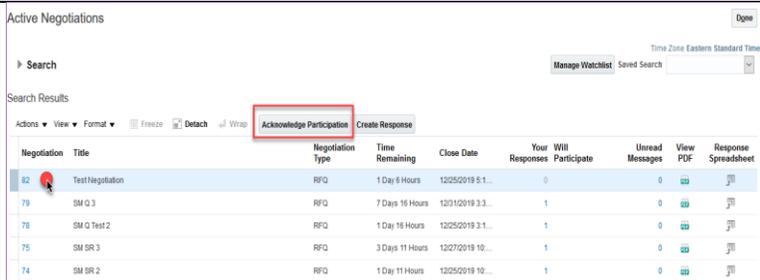
2. Click on **Recent Activity > Invitations.**
OR
Tasks > Negotiations > View Active Negotiations.



3. Active negotiations waiting for response will be listed as shown in the screen shot.

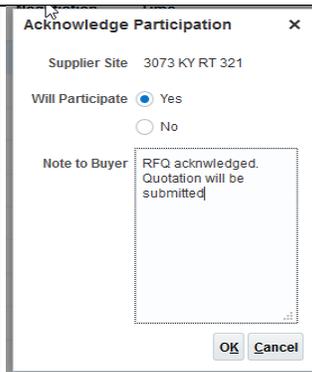
Choose a Negotiation to acknowledge as an Initial step.

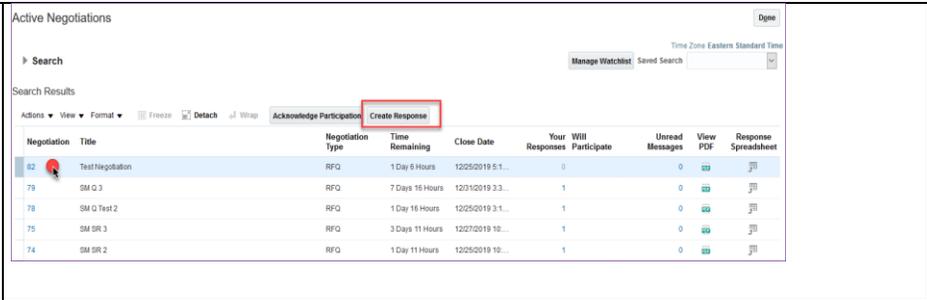
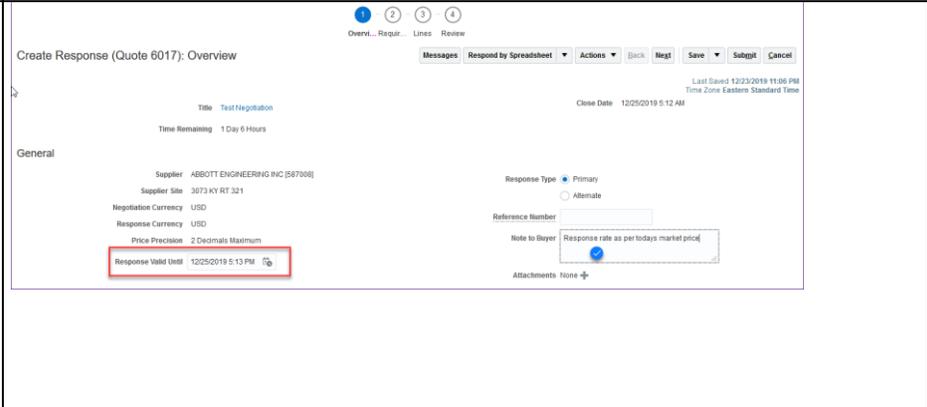
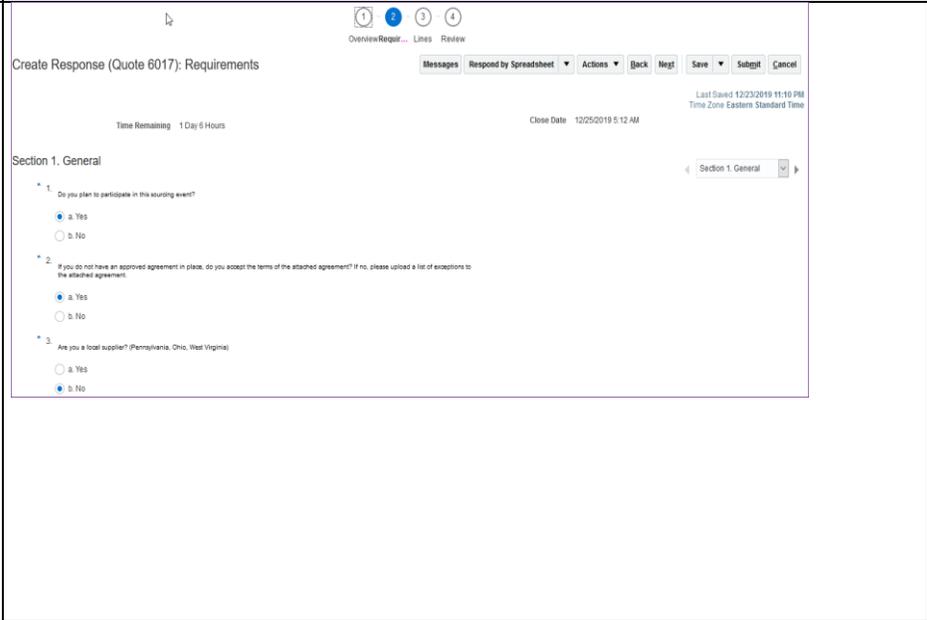
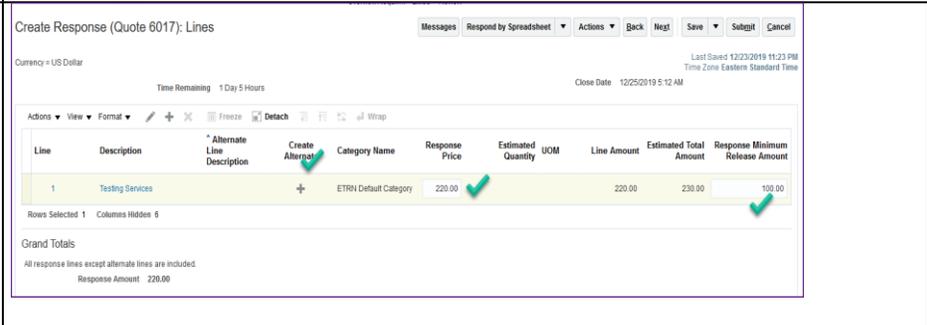
Click on **Acknowledge Participation.**

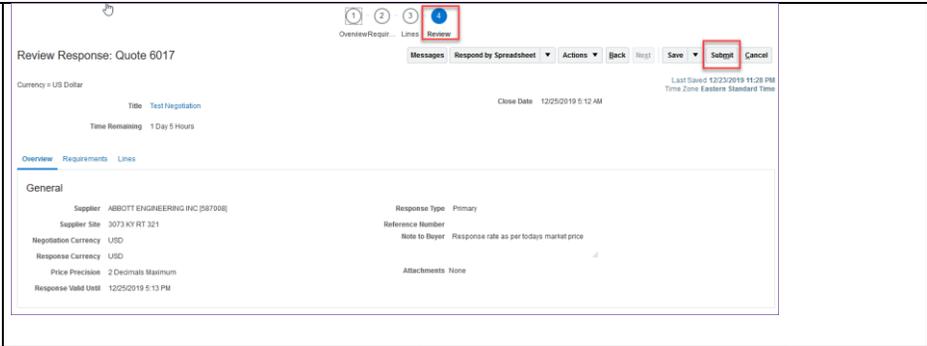
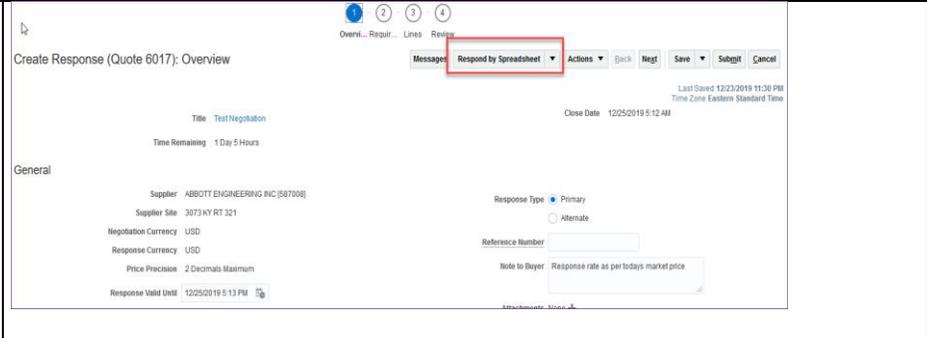
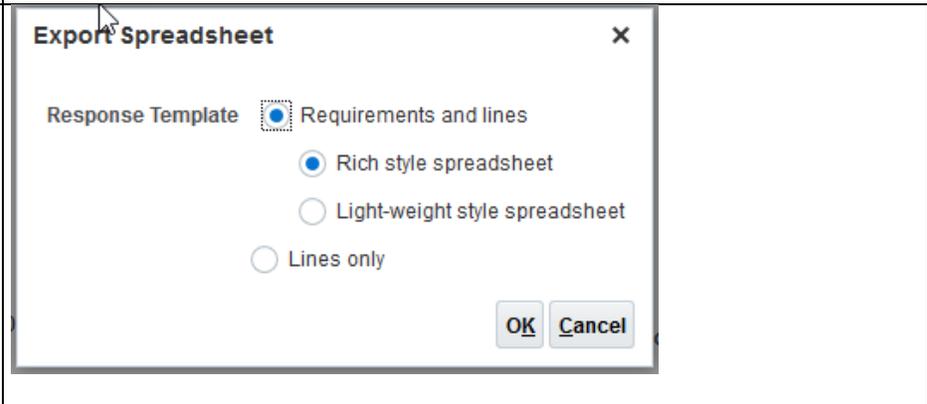


4. Verify the Supplier Site and choose a value for **Will participate** (Yes/No).

Enter any notes in **Note to Buyer.**



<p>5. Click on Create Response.</p>	 <p>Active Negotiations</p> <p>Search</p> <p>Search Results</p> <p>Actions View Format Freeze Detach Wrap Acknowledge Participation Create Response</p> <table border="1"> <thead> <tr> <th>Negotiation</th> <th>Title</th> <th>Negotiation Type</th> <th>Time Remaining</th> <th>Close Date</th> <th>Your Will Participate</th> <th>Unread Messages</th> <th>View PDF</th> <th>Response Spreadsheet</th> </tr> </thead> <tbody> <tr> <td>82</td> <td>Test Negotiation</td> <td>RFQ</td> <td>1 Day 6 Hours</td> <td>12/25/2019 5:12 AM</td> <td>0</td> <td>0</td> <td></td> <td></td> </tr> <tr> <td>79</td> <td>SM Q 3</td> <td>RFQ</td> <td>7 Days 16 Hours</td> <td>12/21/2019 3:30 PM</td> <td>1</td> <td>0</td> <td></td> <td></td> </tr> <tr> <td>78</td> <td>SM Q Test 2</td> <td>RFQ</td> <td>1 Day 16 Hours</td> <td>12/25/2019 3:11 PM</td> <td>1</td> <td>0</td> <td></td> <td></td> </tr> <tr> <td>75</td> <td>SM SR 3</td> <td>RFQ</td> <td>3 Days 11 Hours</td> <td>12/27/2019 10:00 AM</td> <td>1</td> <td>0</td> <td></td> <td></td> </tr> <tr> <td>74</td> <td>SM SR 2</td> <td>RFQ</td> <td>1 Day 11 Hours</td> <td>12/25/2019 10:00 AM</td> <td>1</td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table>	Negotiation	Title	Negotiation Type	Time Remaining	Close Date	Your Will Participate	Unread Messages	View PDF	Response Spreadsheet	82	Test Negotiation	RFQ	1 Day 6 Hours	12/25/2019 5:12 AM	0	0			79	SM Q 3	RFQ	7 Days 16 Hours	12/21/2019 3:30 PM	1	0			78	SM Q Test 2	RFQ	1 Day 16 Hours	12/25/2019 3:11 PM	1	0			75	SM SR 3	RFQ	3 Days 11 Hours	12/27/2019 10:00 AM	1	0			74	SM SR 2	RFQ	1 Day 11 Hours	12/25/2019 10:00 AM	1	0		
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79	SM Q 3	RFQ	7 Days 16 Hours	12/21/2019 3:30 PM	1	0																																																	
78	SM Q Test 2	RFQ	1 Day 16 Hours	12/25/2019 3:11 PM	1	0																																																	
75	SM SR 3	RFQ	3 Days 11 Hours	12/27/2019 10:00 AM	1	0																																																	
74	SM SR 2	RFQ	1 Day 11 Hours	12/25/2019 10:00 AM	1	0																																																	
<p>6. Create Response (Overview) page will open.</p> <p>(If you want to Respond by Spreadsheet, skip to step 10)</p> <p>Enter the date in Response Valid Until.</p> <p>Enter any notes in Note to Buyer.</p>	 <p>Create Response (Quote 6017): Overview</p> <p>Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel</p> <p>Overview Requir... Lines Review</p> <p>Title Test Negotiation</p> <p>Time Remaining 1 Day 6 Hours</p> <p>Close Date 12/25/2019 5:12 AM</p> <p>General</p> <p>Supplier ABBOTT ENGINEERING INC [587908]</p> <p>Supplier Site 3073 KY RT 321</p> <p>Negotiation Currency USD</p> <p>Response Currency USD</p> <p>Price Precision 2 Decimals Maximum</p> <p>Response Type Primary Alternate</p> <p>Reference Number</p> <p>Note to Buyer Response rate as per todays market price</p> <p>Response Valid Until 12/25/2019 5:13 PM</p> <p>Attachments None</p>																																																						
<p>7. Click Next to move the Requirements section.</p> <p>Requirement questions with the “Supplier Required” will be displayed for suppliers to enter value as an option or as a Text field.</p> <p>Choose the values or enter the answers required.</p> <p>Enter answers if the Requirements are split into multiple sections.</p>	 <p>Create Response (Quote 6017): Requirements</p> <p>Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel</p> <p>Overview Requir... Lines Review</p> <p>Time Remaining 1 Day 6 Hours</p> <p>Close Date 12/25/2019 5:12 AM</p> <p>Section 1. General</p> <p>1. Do you plan to participate in this sourcing event?</p> <p>a. Yes <input checked="" type="radio"/> b. No <input type="radio"/></p> <p>2. If you do not have an approved agreement in place, do you accept the terms of the attached agreement? If no, please upload a list of exceptions to the attached agreement.</p> <p>a. Yes <input checked="" type="radio"/> b. No <input type="radio"/></p> <p>3. Are you a local supplier? (Pennsylvania, Ohio, West Virginia)</p> <p>a. Yes <input type="radio"/> b. No <input checked="" type="radio"/></p>																																																						
<p>8. Click Next to move to the Lines section where actual Item price can be entered.</p> <p>Enter the Response Price.</p> <p>Enter Minimum Release Amount.</p>	 <p>Create Response (Quote 6017): Lines</p> <p>Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel</p> <p>Currency = US Dollar</p> <p>Time Remaining 1 Day 5 Hours</p> <p>Close Date 12/25/2019 5:12 AM</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Alternate Line Description</th> <th>Create Alternate</th> <th>Category Name</th> <th>Response Price</th> <th>Estimated Quantity</th> <th>UOM</th> <th>Line Amount</th> <th>Estimated Total Amount</th> <th>Response Minimum Release Amount</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Testing Services</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>ETRN Default Category</td> <td>220.00</td> <td></td> <td></td> <td>220.00</td> <td>220.00</td> <td>100.00</td> </tr> </tbody> </table> <p>Rows Selected 1 Columns Hidden 6</p> <p>Grand Totals</p> <p>All response lines except alternate lines are included.</p> <p>Response Amount 220.00</p>	Line	Description	Alternate Line Description	Create Alternate	Category Name	Response Price	Estimated Quantity	UOM	Line Amount	Estimated Total Amount	Response Minimum Release Amount	1	Testing Services		<input checked="" type="checkbox"/>	ETRN Default Category	220.00			220.00	220.00	100.00																																
Line	Description	Alternate Line Description	Create Alternate	Category Name	Response Price	Estimated Quantity	UOM	Line Amount	Estimated Total Amount	Response Minimum Release Amount																																													
1	Testing Services		<input checked="" type="checkbox"/>	ETRN Default Category	220.00			220.00	220.00	100.00																																													

<p>9. Click Next to Review and submit the Response.</p>	
<p>10. You may submit your response by spreadsheet if there are lots of lines/requirements. Click on Respond by Spreadsheet > Export from the Create Response (Overview Page).</p>	
<p>11. Click on Respond by Spreadsheet > Export from the Create Response (Overview Page).</p>	
<p>12. Choose the Response Template options before the document generates in excel. For this example, Requirements and Lines have been selected. Click OK to export the template in a zip file.</p>	

13. Download and unzip the XML file and save on the local drive.

Open the XML file and enter the needed details and save it.

Test Negotiation

Negotiation RFQ 82
Close Date 12/25/2019 5:12
Negotiation Currency USD
Response Currency USD
Price Precision 2

Company Equitrans Midstream Corporation
Buyer Stephen Makar
Phone
Email stephen.makar@moapps.com
Supplier ABBOTT ENGINEERING INC (587008)
Supplier Site 3073 KY RT 321

General

Response Valid Until Example: 12/24/2019 0:53
Reference Number

Note to Buyer

Requirements

1. **General**

1. Do you plan to participate in this sourcing event?
a. Yes
1.b.1. Please provide a reason for your nonparticipation in this sourcing event. (Response attachments are optional)

2. If you do not have an approved agreement in place, do you accept the terms of the attached agreement? If no, please upload a list of exceptions to the attached agreement.
a. Yes
b. Yes

General Lines (1 - 1)

14. Go to the Supplier Portal and Import the file.

Choose the file on the local drive to upload and click **OK**.

Create Response (Quote 6017): Overview

Messages Respond by Spreadsheet Actions Back Next Save Submit Cancel

Export Import

Title Test Negotiation
Time Remaining 1 Day 5 Hours
Close Date 12/25/2019 5:12 AM
Last Saved 12/23/2019 9:30 PM
Time Zone Eastern Standard Time

Import Response

Importing data will overwrite any existing online data.

* File Name Browse... Copy of Negotiation82-Response.xml

OK Cancel

[587008]

15. Once the file is uploaded, verify the Requirements and Lines.

In the screen shot, the line details are ok.

Click **Submit**.

Create Response (Quote 6018): Lines

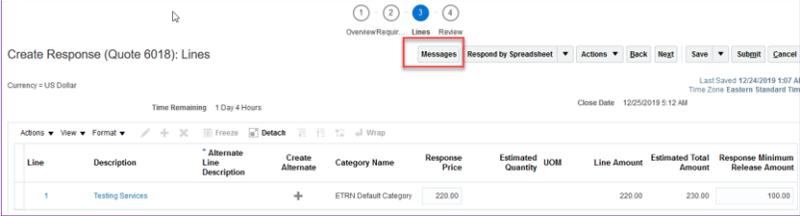
Currency = US Dollar
Time Remaining 1 Day 4 Hours
Close Date 12/25/2019 5:12 AM
Last Saved 12/24/2019 1:07 AM
Time Zone Eastern Standard Time

Line	Description	* Alternate Line Description	Create Alternate	Category Name	Response Price	Estimated Quantity	UOM	Line Amount	Estimated Total Amount	Response Minimum Release Amount
1	Testing Services		+	ETRN Default Category	220.00			220.00	230.00	100.00

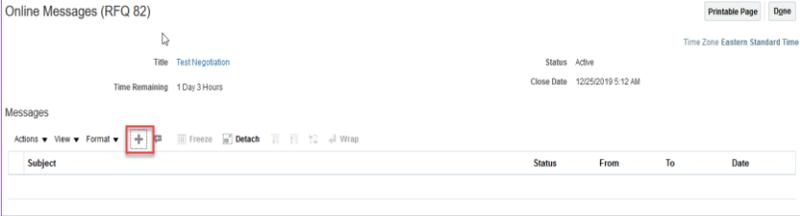
Columns Hidden: 6

1.11 Manage Supplier Messages

2. Suppliers can communicate with Buyers using message functionality within the Supplier Portal. Go to an active Negotiation to see the **Messages** button.



3. Click on the + icon to enter new messages.



4. Enter new message to Buyer. Text can be formatted as needed and attachments can be added. Click **Send** to confirm the message.

