transHUB

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

Table of Contents

1. Supplier Portal

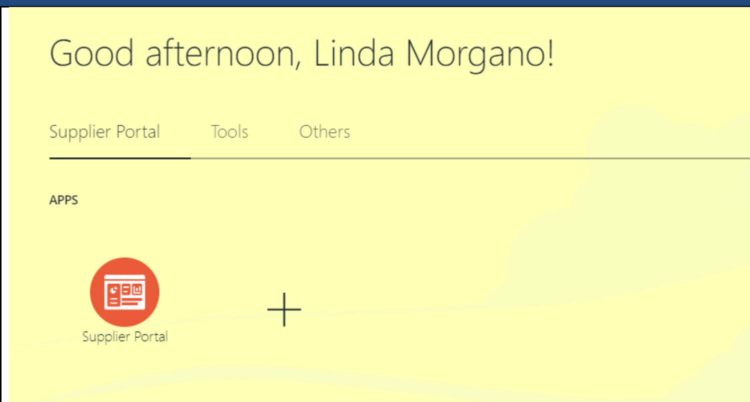
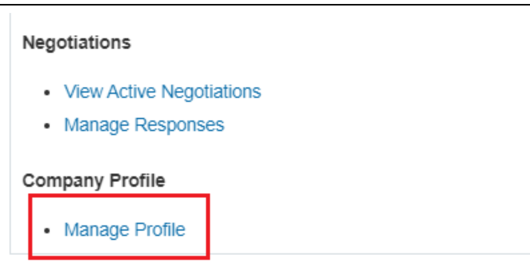
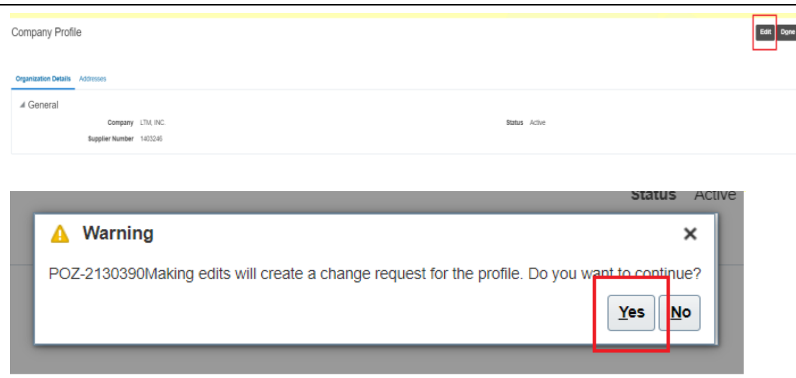
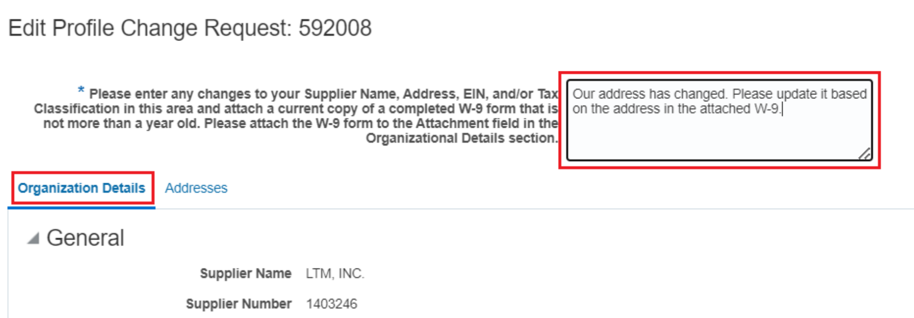
1.1 Weblink

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

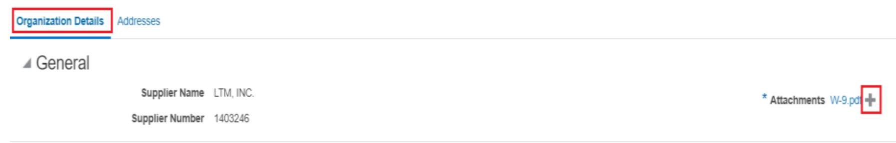
1.2 Tips

- 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)

1. Go to Home page click on Supplier Portal	
2. Go to Tasks on left side of the Supplier Portal page and click on the **Manage Profile** link.	
3. Click on **Edit**. A warning message will be displayed stating you will create a change request. Click on **Yes.**	
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.	

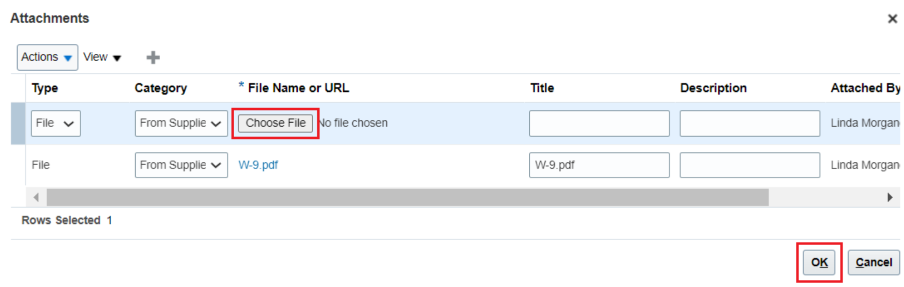
5. In the **Organizations Details** tab, attach a completed W-9 to the **Attachments** field by clicking on the "**+**" sign. NOTE: You may see previous versions of your W-9s stored in the Attachment field.

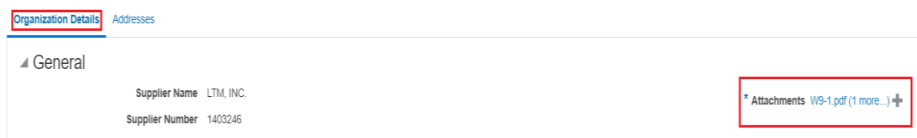


6. Click on **Choose File** and select the W-9 from your files. Click **OK** after the W-9 has been added.

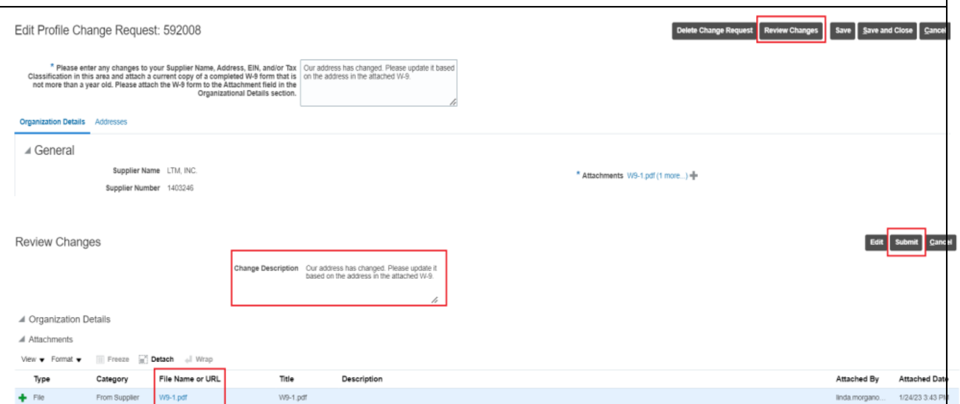
   NOTE: In this example, there was a previous W-9 stored in the Attachment field so it will be displayed along with the new W-9 that was attached.

   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**.

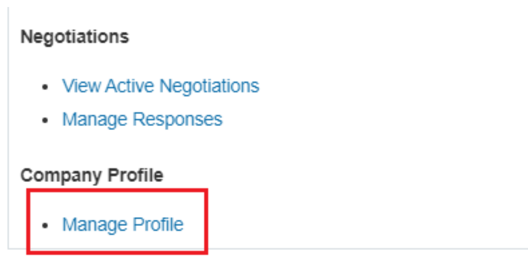


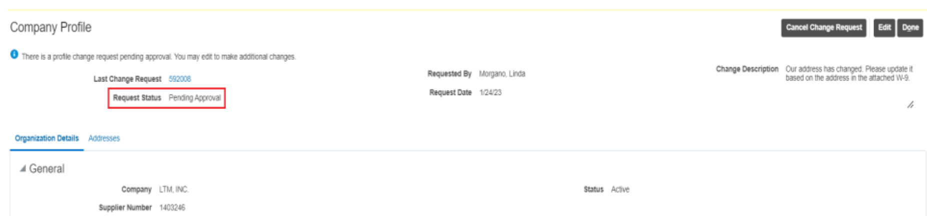
8. A confirmation window will pop up showing that your Change Request has been submitted for approval. Click on **Ok** and **Done** to exit.

9. To double check the Change Request that you submitted, click on **Manage Profile** link under **Tasks.**

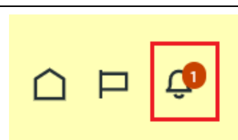
   If the Change Request has not been Processed by ETRN, it will still have a **Request Status** of **Pending Approval**.

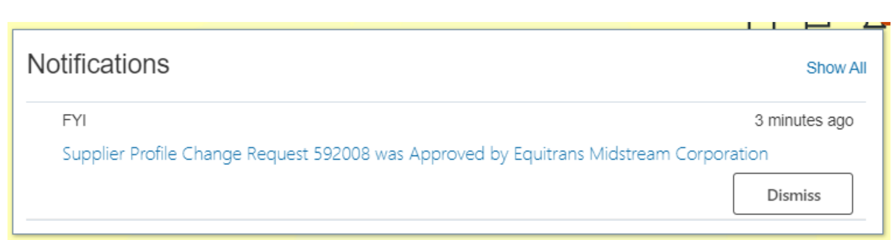
   NOTE: If you need to edit the pending Change Request, click on **Edit** and the system will prompt you to make your changes. If you need to cancel the pending Change Request, click on **Cancel Change Request** and the system will prompt you to cancel the request.





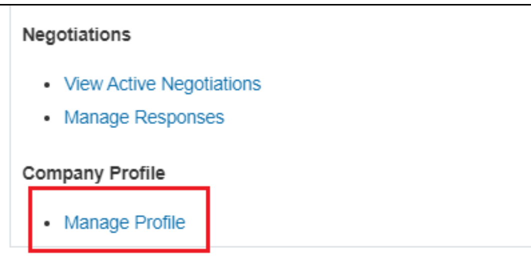
10. If the Change Request was approved or rejected by our company, you will see a Notification by clicking on the **Bell icon.** You will also receive an email.





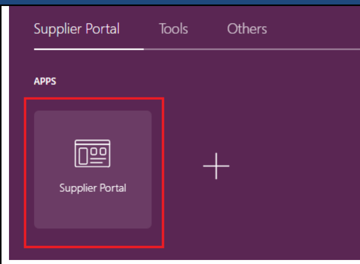
You can also see the status of the Change Request by clicking on **Manage Profile** Under **Tasks.** You will land on the **Company Profile** page and the **Request Status** will display as **Processed**.

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.



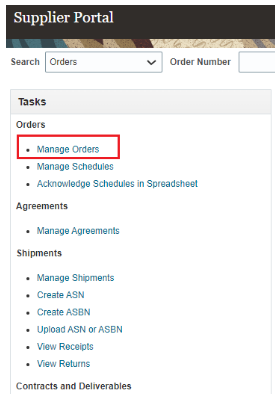
1.4 View Purchase Orders (POs)

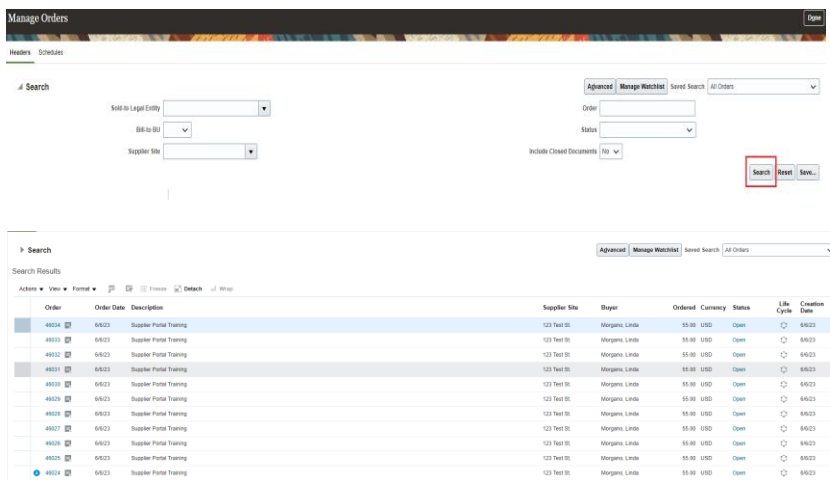
1. Go to Home page click on **Supplier Portal**



2. Under **Tasks**->**Orders**->Click on **Manage Orders**

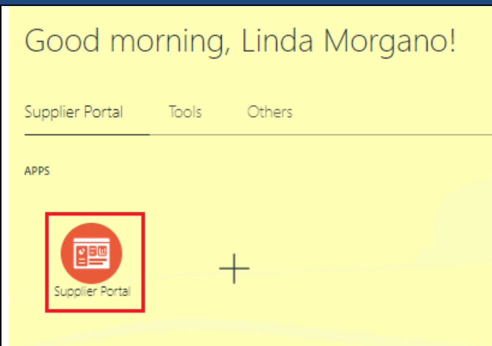
   On the **Manage Orders** screen, you can do a blind search and leave all the fields blank and click on **Search** and this will retrieve all your Open POs. To narrow down your results, you can enter information in any of the fields.



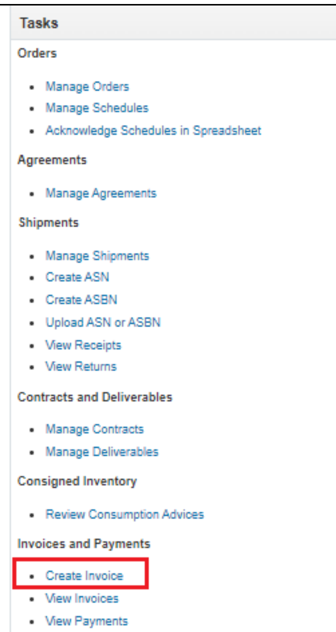


1.5 Create Invoice for a PO

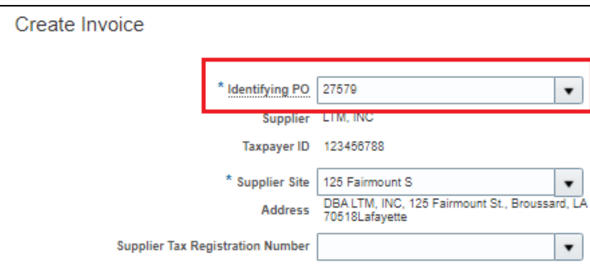
2. Click on **Supplier Portal** from the Supplier Portal Home page.



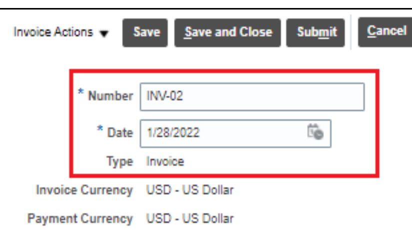
3. Select **Create Invoice** from the Supplier Portal Tasks list.

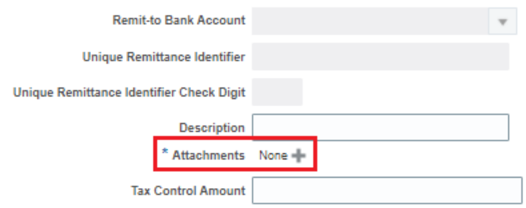
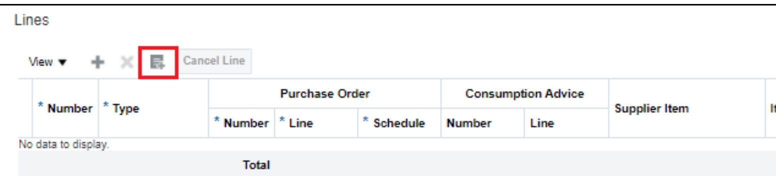
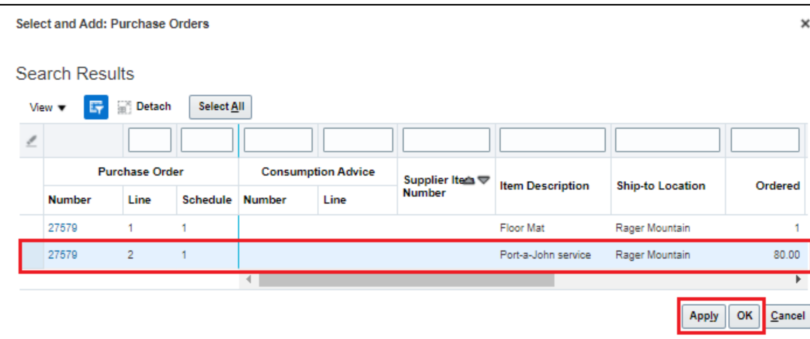
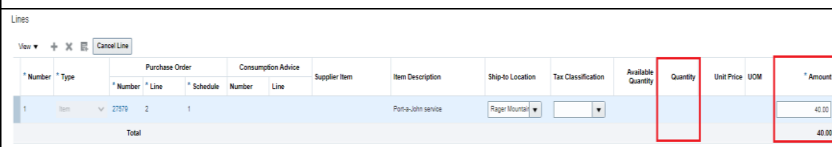
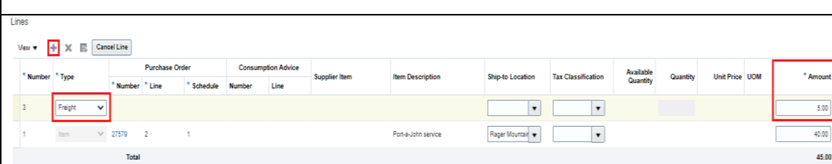


4. Enter PO number in the **Identifying PO** field. PO number will fetch supplier, supplier site, and other details from the PO.

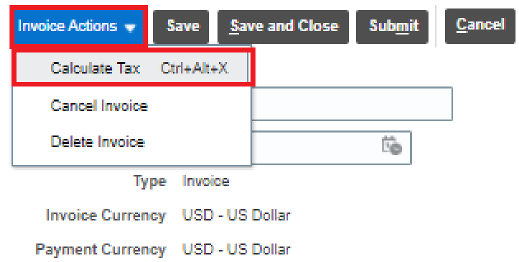


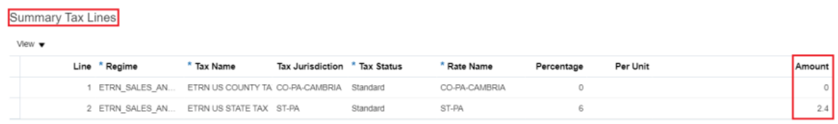
5. Enter the **Invoice Number** and **Date** (must be present or future date; cannot be a past date). **Type** must be **"Invoice."**



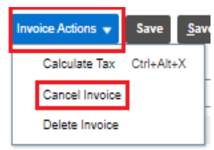
<table>
<tr>
<td>6. All invoices require an attachment of supporting documentation. Click on the “+” icon to add an attachment with Category of “Approver.” Verify the other details and proceed to the Lines section.</td>
<td>
</td>
</tr>
<tr>
<td>7. Click on the Tablet icon to retrieve the PO line details.</td>
<td>
</td>
</tr>
<tr>
<td>8. Highlight the line(s) that you want to invoice against; click Apply and Ok.</td>
<td>
</td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
</table>

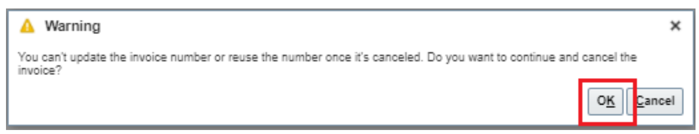
11. Before submitting the Invoice, you MUST click on **Calculate Tax** from the **Invoice Actions** menu to pull any tax amounts from the PO. If taxes are applied to the line item(s), they will appear in the **Summary Tax Lines** section.
    - **If you believe there is a discrepancy with the calculated 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.**

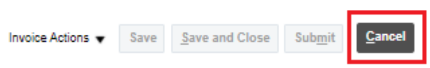




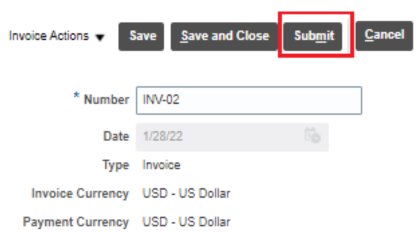
****IF THERE IS A TAX ISSUE****





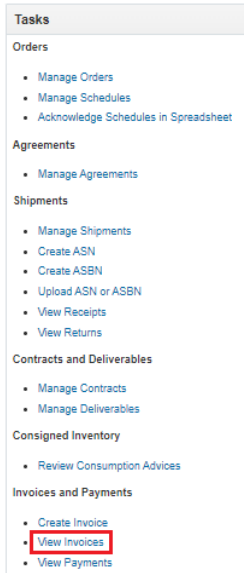


****IF THERE IS NOT A TAX ISSUE****

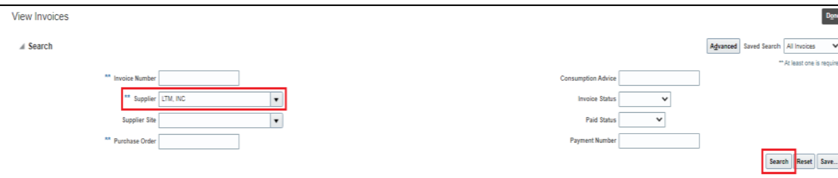


12. Confirm that the Invoice was submitted and has a status of "**In process**" by looking in the **View Invoices** section.

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

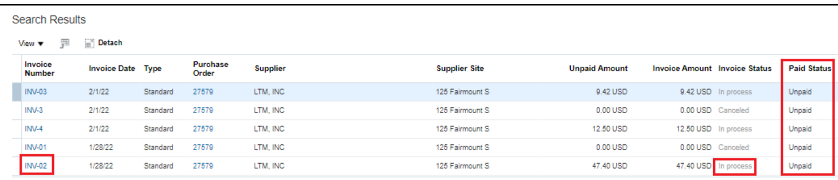


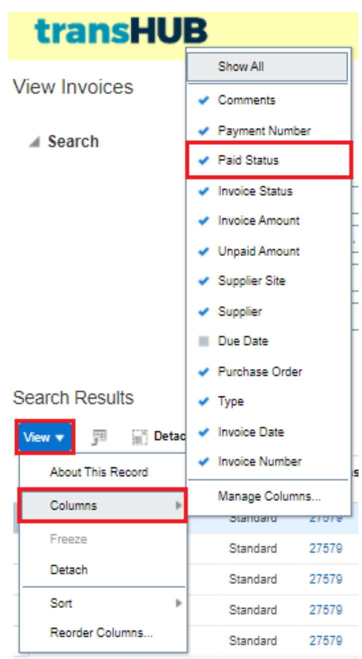
13. Enter, or pull up, your Supplier Name in the **Supplier** field and click on **Search**.



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.



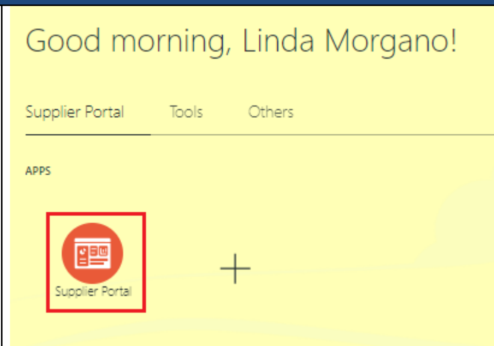


1.6 Cancel an Invoice with an "Incomplete" Status

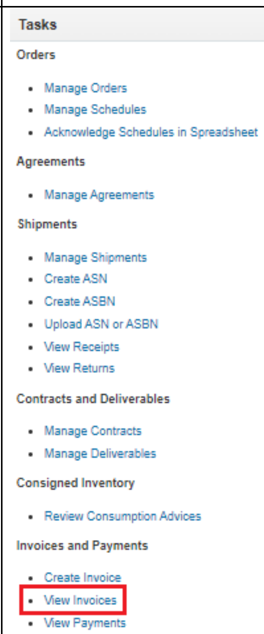
2. If you were in the process of creating an Invoice and you **Saved** or **Canceled** it due to an issue with the associated PO that needs to be resolved such as taxes, then the Invoice will have a status of **"Incomplete."**

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**."

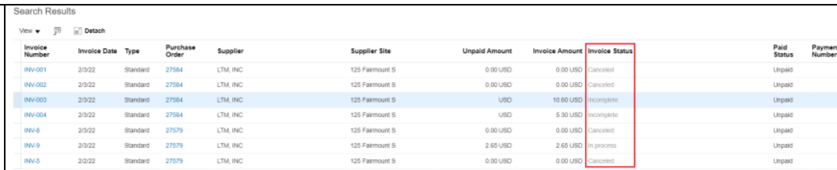
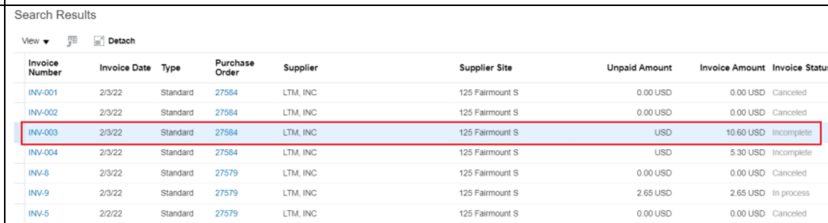
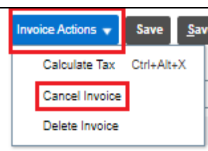
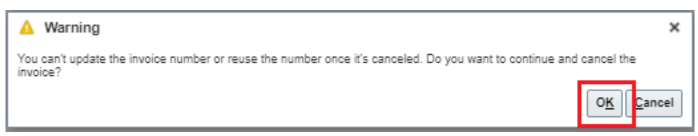
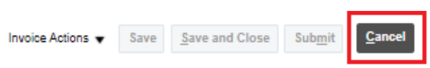
4. Click on **Supplier Portal** from the Supplier Portal Home page.



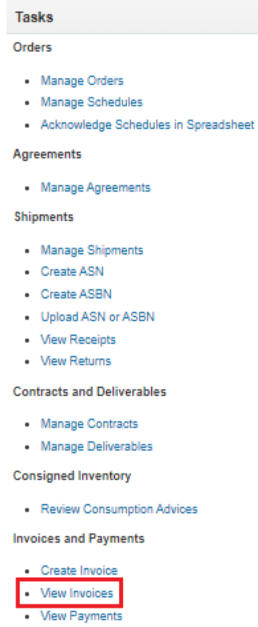
5. Select **View Invoices** from the Supplier Portal **Tasks** list.



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

7. All Invoices you submitted will show in the Search Results section with details such as **Invoice Status**, **Paid Status**, etc.	
8. Click on the Invoice number that has an **Invoice Status** of **“Incomplete.”**	
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.	 
10. Click on **Invoice Actions, Cancel Invoice, Ok, and Cancel.**	  

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**.

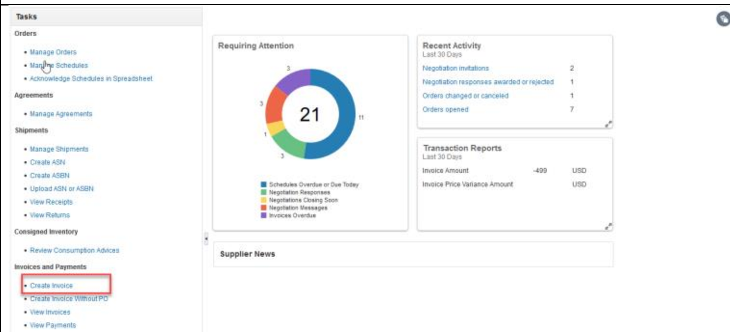
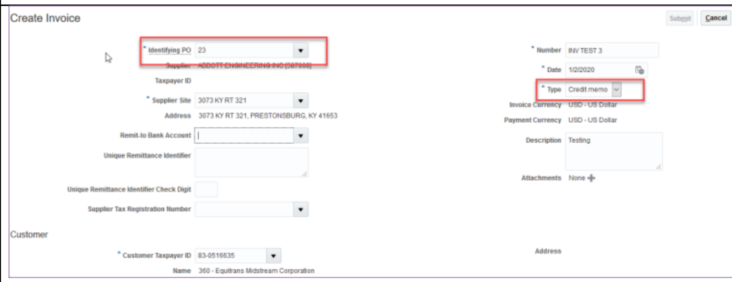
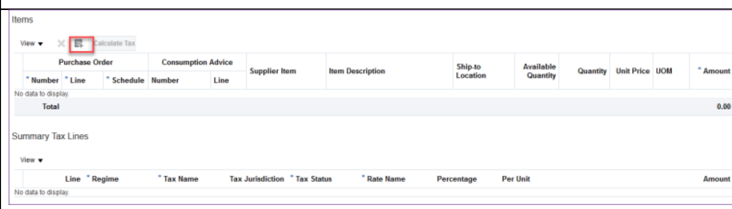


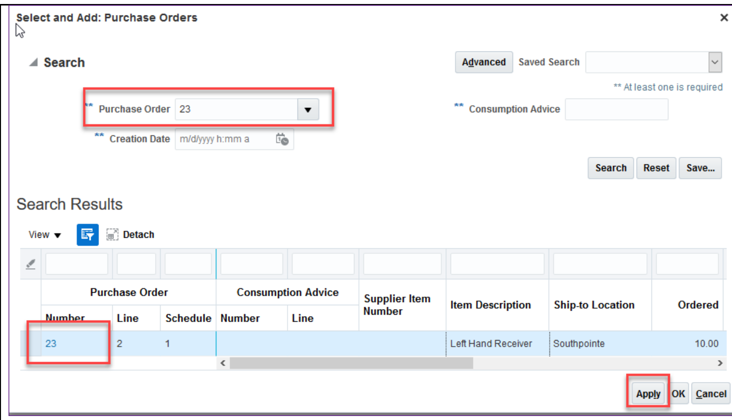
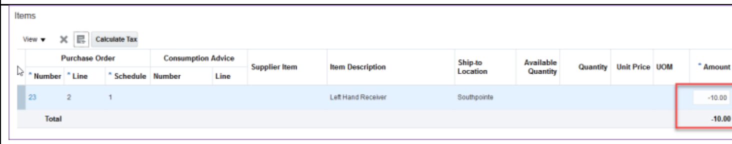
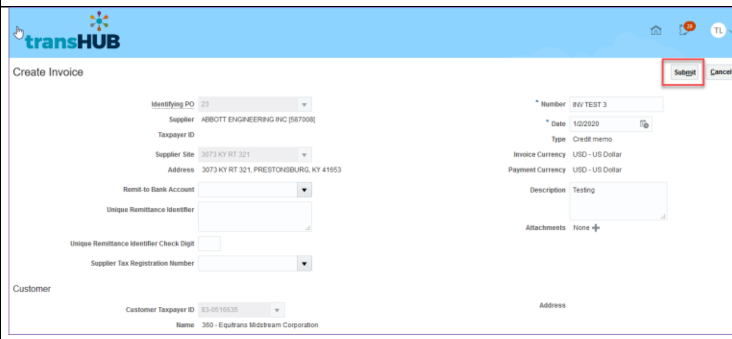
12. Enter, or pull up, your Supplier Name in the **Supplier** field and click on **Search**.

13. The **Invoice status** has changed from **“Incomplete”** to **“Canceled.”** Notify Equitrans Midstream that the Invoice has been Canceled and the PO is available for editing.

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	0.00 USD	0.00 USD	Canceled
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

1.7 Create Credit Memo

2. From Supplier Poral 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	

<table>
<tr>
<td>6. Search for the line to be added to the Invoice</td>
<td>
</td>
</tr>
<tr>
<td>7. Observe that the line amount added as credit</td>
<td>
</td>
</tr>
<tr>
<td>8. Verify and submit the Credit Memo</td>
<td>
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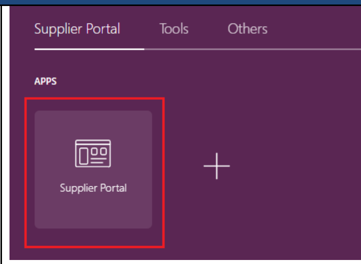
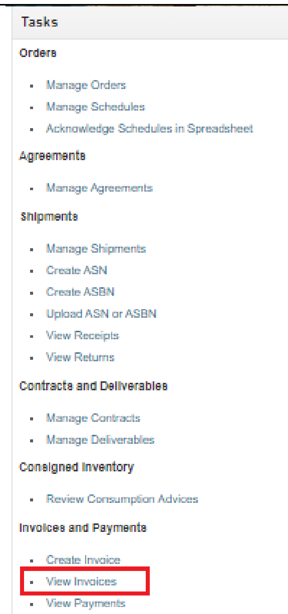
</tr>
</table>

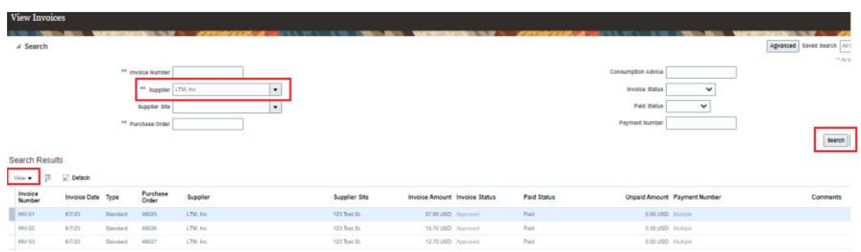
1.8 View Invoice Status

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



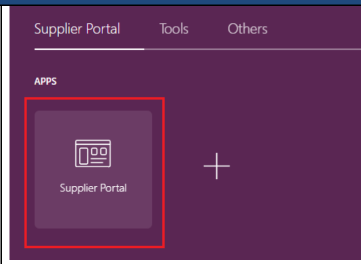
2. Under **Tasks**->**Invoices and Payments** ->Click on **View Invoices**
   On the **View Invoices** screen, enter your Supplier Name in the **Supplier** field, click **Search.** This will retrieve all Invoices (submitted, canceled, incomplete). To narrow down your results, you can enter information 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.





1.9 View Payment Status

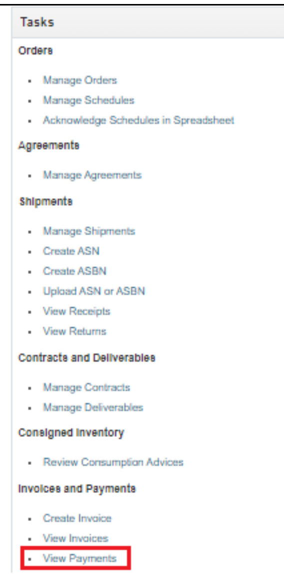
1. Go to Home page click on **Supplier Portal**.

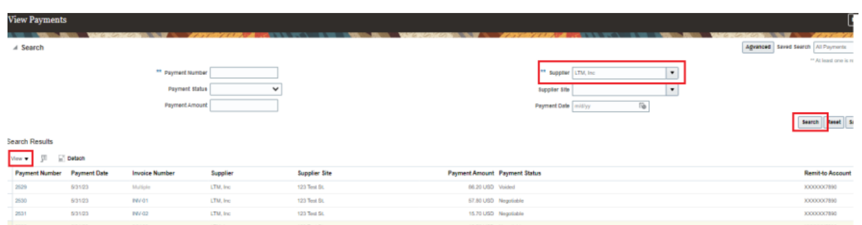


2. Under **Tasks**->**Invoices and Payments** ->Click on **View Payments**

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.





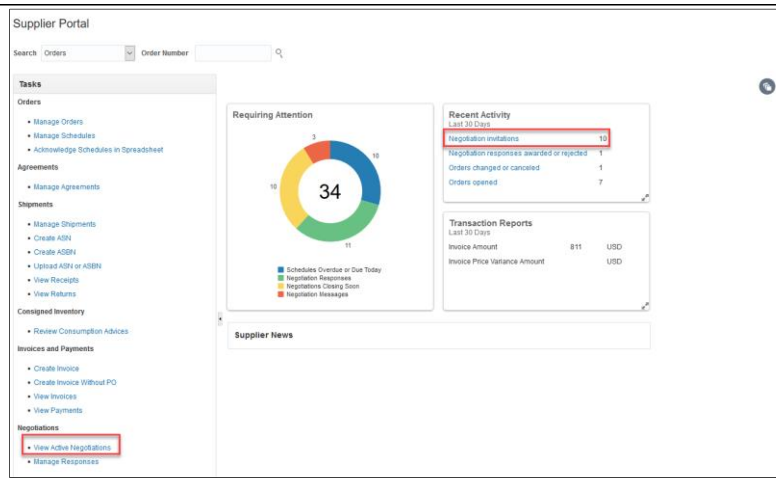
1.10 Respond to Negotiation

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

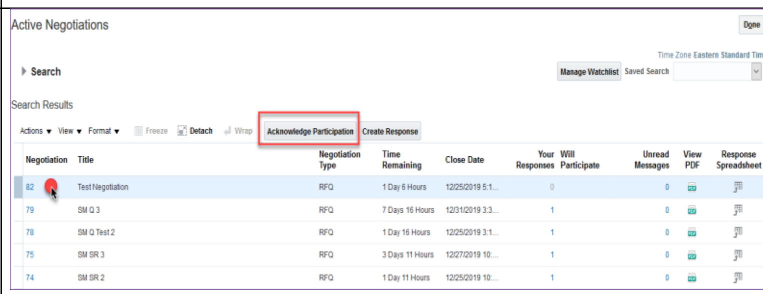
   Tasks > Negotiations > View Active Negotiations.



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

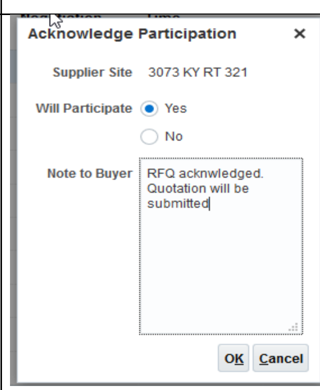
   Choose a Negotiation to acknowledge as an Initial step.

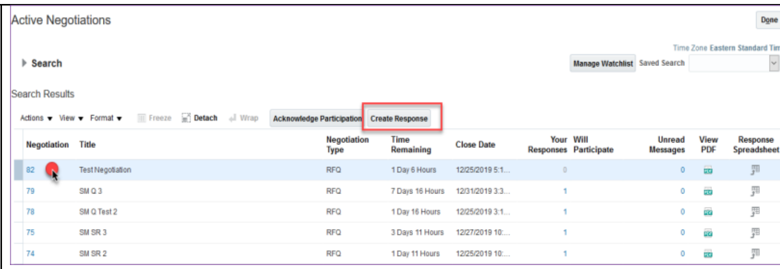
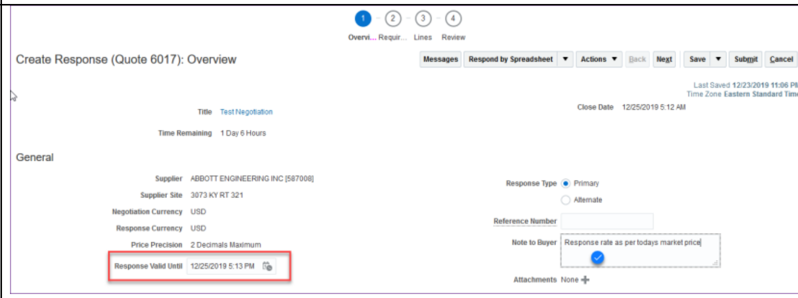
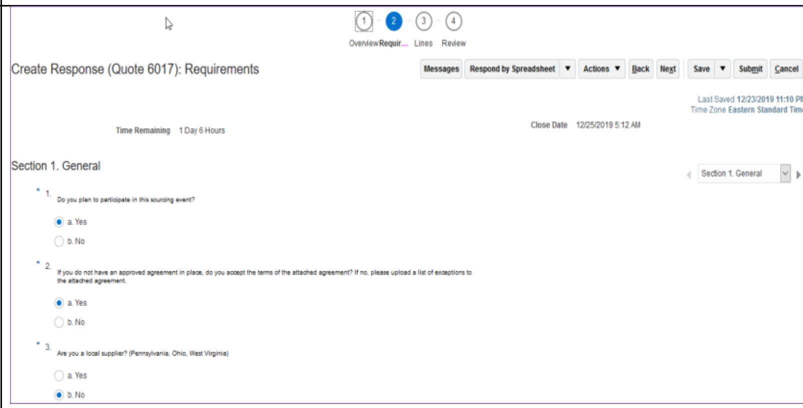
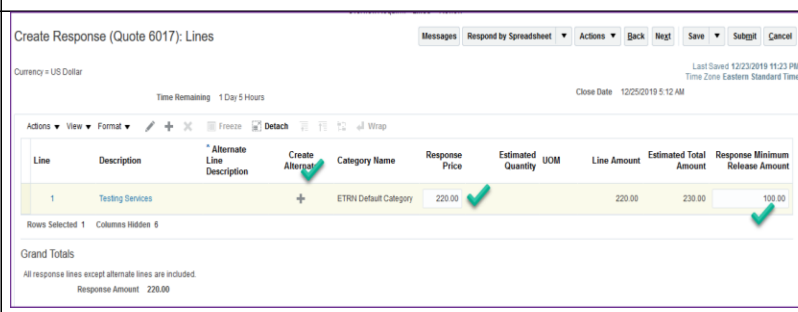
   Click on **Acknowledge Participation.**



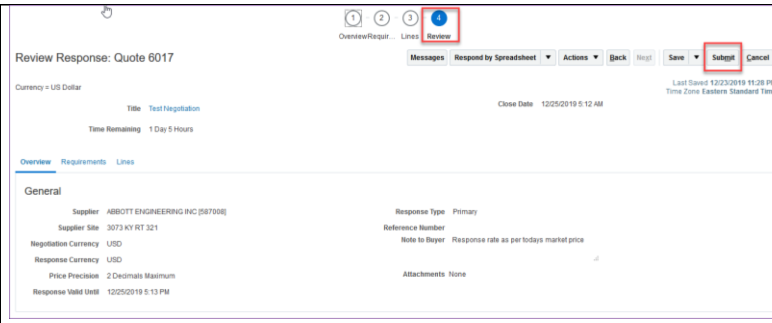
4. Verify the Supplier Site and choose a value for **Will participate** (Yes/No).

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



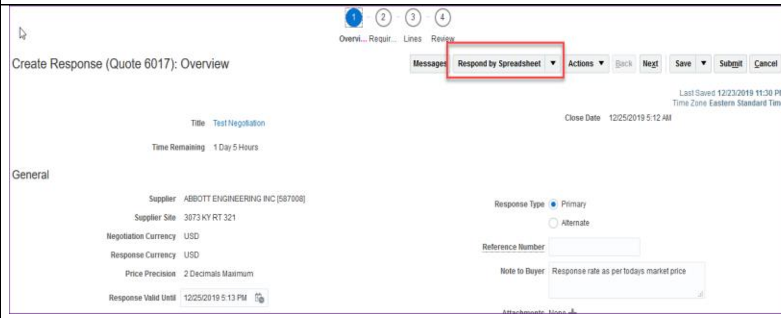
5. Click on **Create Response.**	
6. **Create Response** (Overview) page will open. **(If you want to Respond by Spreadsheet, skip to step 10)** Enter the date in **Response Valid Until.** Enter any notes in **Note to Buyer.**	
7. Click **Next** to move the Requirements section. Requirement questions with the “Supplier Required” will be displayed for suppliers to enter value as an option or as a Text field. Choose the values or enter the answers required. Enter answers if the Requirements are split into multiple sections.	
8. Click **Next** to move to the Lines section where actual Item price can be entered. Enter the **Response Price.** Enter **Minimum Release Amount.**	

9. Click **Next to Review** and submit the **Response**.

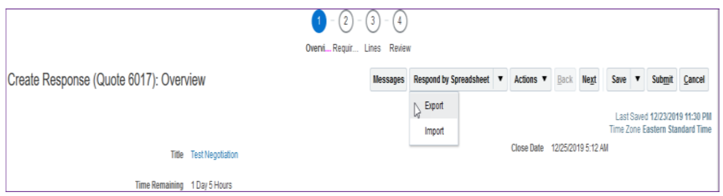


10. You may submit your response by spreadsheet if there are lots of lines/requirements.

    Click on **Respond by Spreadsheet > Export** from the Create Response (Overview Page).



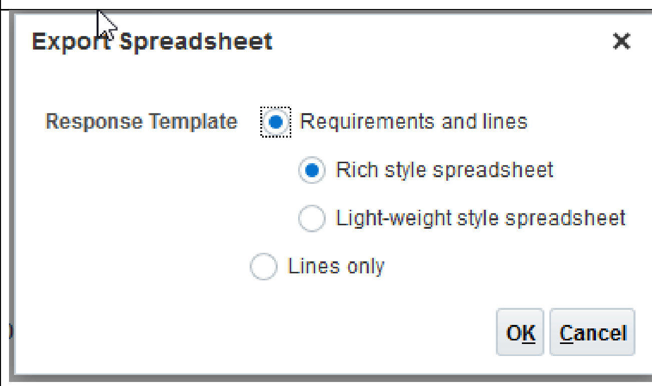
11. Click on **Respond by Spreadsheet > Export** from the Create Response (Overview Page).



12. Choose the **Response Template** options before the document generates in excel.

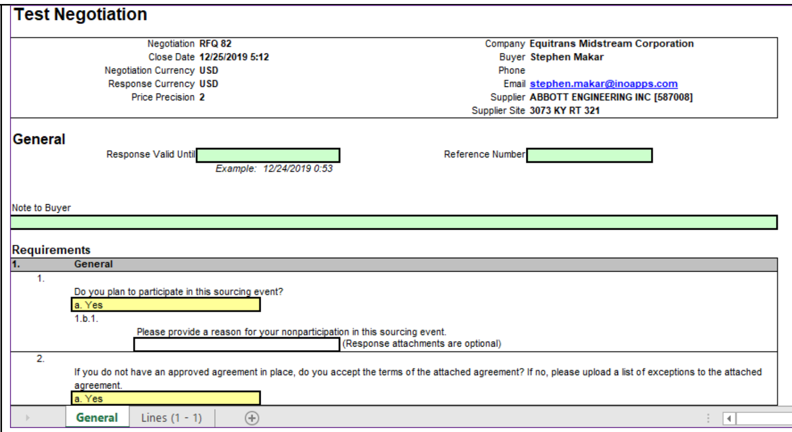
    For this example, **Requirements and Lines** have been selected.

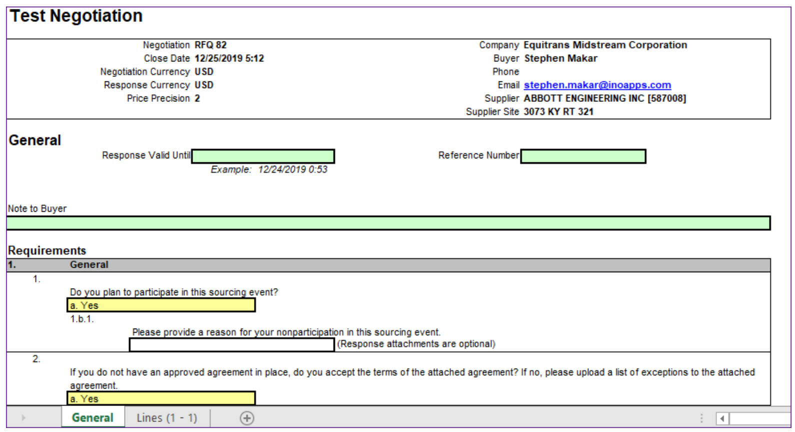
    Click **OK** to export the template in a zip file.



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

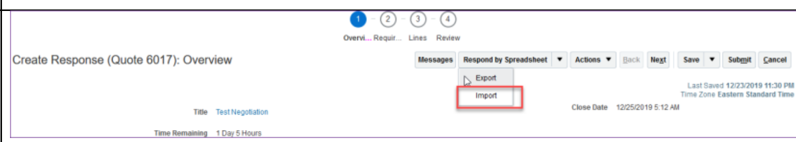
    Open the XML file and enter the needed details and save it.

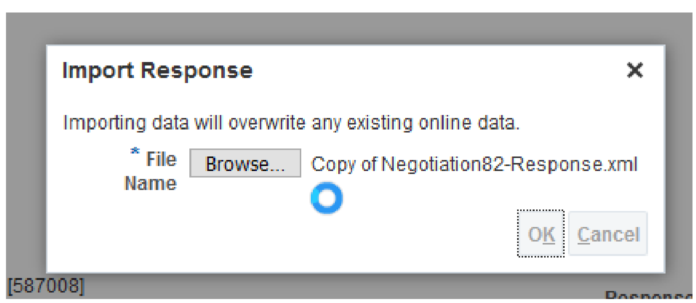




14. Go to the Supplier Portal and Import the file.

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

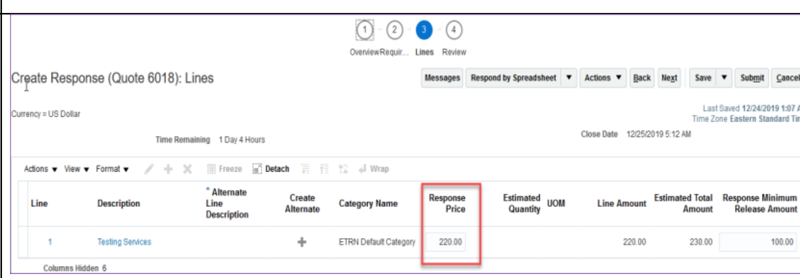




15. Once the file is uploaded, verify the Requirements and Lines.

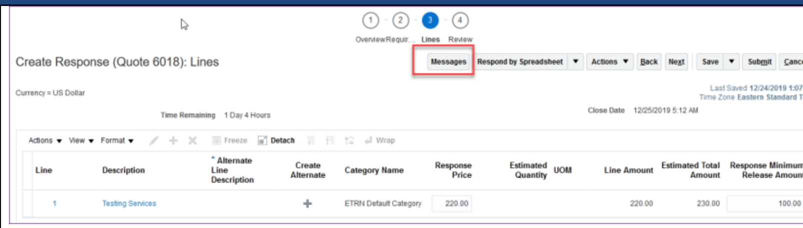
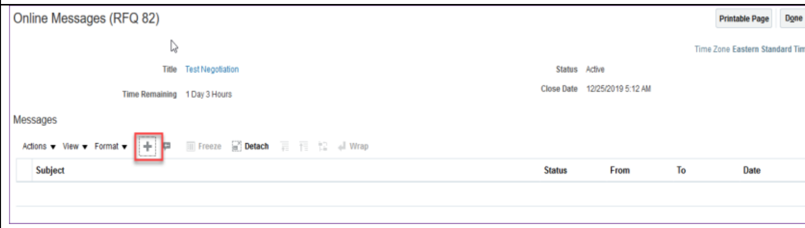
    In the screen shot, the line details are ok.

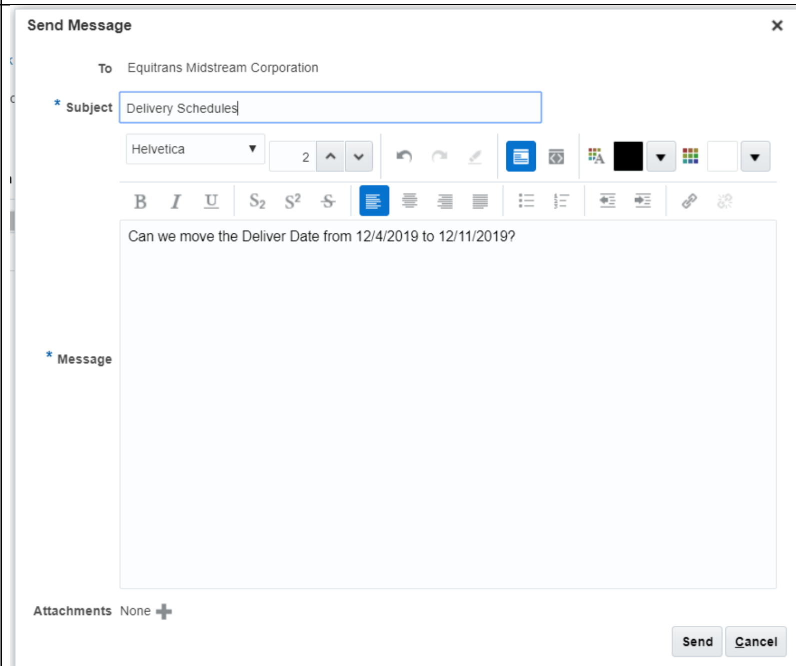
    Click **Submit.**



1.11 Manage Supplier Messages

<table>
<tr><td>2. Suppliers can communicate with Buyers using message functionality within the Supplier Portal.

Go to an active Negotiation to see the **Messages** button.</td><td>
</td></tr>
<tr><td>3. Click on the **+** icon to enter new messages.</td><td>
</td></tr>
<tr><td>4. Enter new message to Buyer. Text can be formatted as needed and attachments can me added.

Click **Send** to confirm the message.</td><td>
</td></tr>
</table>