1 Ground rules

- Maximum three employees per Vendor can hold the Administrator access.
- List off all internal users with name, roles, accesses shall be sent quarterly to Equinor.
  - Send via email to vendorportal@equinor.com
- Leavers must be removed immediately and updated in the quarterly list to Equinor.
  - Send via email to vendorportal@equinor.com
- Equinor can do verifications two weeks hereafter.

2 Introduction and practical information

This guide is for suppliers using Equinor's Vendor Portal (VP) at https://vendorportal.statoil.com (will be updated to @equinor domain during fall 2018). A supplier that wants to use the portal must request this from a Equinor contract manager.

Suppliers can do the following in the portal:

- Receive and confirm Purchase orders for materials and services
  - Materials: You can update quantity and delivery date for goods
  - Services: You can confirm the order without changes
- Submit Service Entry for approval by Equinor customer representative
- Submit invoices for materials and services

Questions and problems may be directed via email to vendorportal@equinor.com or on the phone to +47 51 99 92 22, press 1 for General IT, press 6 for Procurement support (includes Vendor Portal usage), press 7 for Financial master data, invoicing and general accounting.

Reset of password can be done via: https://resetpassword.statoil.com/. (will be updated to @equinor domain during fall 2018)
3   How to handle Materials Purchase orders

3.1   How to Confirm Purchase Order

Equinor-side: Purchase order (PO) is created automatically or by a purchaser in Equinor. When saved it’s sent to Vendor Portal.

Supplier-side: To confirm the PO
Click on New to open list of New purchase orders.

NOTE: Purchase orders changed by Equinor purchaser will be listed under In Process

Click on the PO number you want to open.

Click on Process to start confirming PO

Attachments

Complete PO as pdf attachment
Scroll down on page to **Item overview** and click on **Confirm All Items** to confirm entire PO.

![Item overview]

**NOTE:** You can change volume and delivery date.

Under **General Information** you can enter data as illustrated. **NOTE:** You can use this info to sort or search for POs later.

![General Information]

Click **Send** to send PO confirmation:

![Send]

PO is confirmed and is now open for invoicing.

- Start Page > List of Purchase Orders > Display Purchase Order
- Info: Your changes have been adopted successfully

![Create Invoice]

Security Classification: Open - Status: Final
3.2 How to display the PO PDF in Vendor Portal

There are two ways to display PO PDF in the Vendor Portal.

The preferred way to view the PO PDF is to open the link under Attachments in the Vendor portal PO.

If the attachment is missing it is possible to open the PO PDF – mark the PO and press Print. You will get a different layout because this PDF is generated by the Vendor portal.

3.3 How to update delivery date on confirmed PO

Find your PO in list of Confirmed Purchaser orders or by searching for it.
Click **Change Order Confirmation**

Enter new delivery dates, click on **Confirm All Items**.

**TIP:** Expand the **Confirmed For** column to show the calendar button.

Click **Send** and delivery date is changed.
3.4 Phased Delivery – Delivery Times

Press New Row
Now you can divide the delivery
Choose and enter Delivery Date and Confirmed Quantity

Go back on the top of the Purchase Order
Scroll down on page to Item Overview and click on Confirm All Items to confirm entire PO and press Send.

You will now see the symbol for Phased Delivery

If you press the symbol you will see the Delivery Times which are Confirmed
3.5 How to create Invoice

Click on Create.

**Tip:** You can also create invoice directly from PO screen if the Create Invoice button is displayed.

Click on For a Purchase Order

Select correct PO and click on Create Invoice

Enter supplier invoice Number, select Tax code for all invoice items and press Send.

**NOTE:** You can invoice for parts of the delivery by changing Quantity or deleting one or more invoice lines.

**TIP:** Enter tax code on first invoice line and click Copy Tax Code to mass-update remaining invoice lines.

**OBS:** Check that you have the same Tax amount on the Vendorportal invoice as on the invoice in your own billing system.
**Important:** For invoices using foreign currencies you need to specify the tax amount in local currency. Specify the amount and write the currency code (NOK) as shown below. If this is not done the invoice will be returned from Equinor.

![Invoice Example]

3.6 **Phased Delivery - Invoice**

To be able to make an invoice for Phased Delivery the **delivery date** has to be passed at least for the first delivery.
3.7   Status: Creation Completed

When a Purchase Order has changed the status to Creation Completed is not possible to create invoice.

To activate the purchase order you have to contact the purchaser and ask for following changes:

- Update the delivery date (ex. to dato today)
- Remove the mark in Deliv. Compl (section Delivery)

The change of the purchase order will then be sent to the Vendorportal and get the status “In Process”. You need to confirm the PO.

After confirming the purchase order the “Create Invoice” button will show.
4 How to handle Service Purchase orders

4.1 How to confirm services Purchase Order

Equinor-side: Purchase order (PO) is created automatically or by a purchaser in Equinor. When saved it’s sent to Vendor Portal.

Supplier-side: To confirm the PO
Click on New to open list of New purchase orders. NOTE: Purchase orders changed by Equinor purchaser will be listed under In Process.

Click on the PO number you want to open.
Click on **Process** to start confirming PO

Click **Confirm All Items**, enter **Name** (optional reference field for supplier for filtering and search) and click **Send**.

Click **Confirm All Items**, enter **Number** (optional supplier's order reference number) and **Name** (optional reference field for supplier for filtering and search) and click **Send**.
4.2 How to Create Service Entry

Service Entry is submitted to Equinor approver before invoice for approval of services delivered, and ensure correct invoice data. Clarifications and adjustments are then done before submission of invoice, and when invoice is sent it will be paid on due date with no further discussion.

Click Create to display list of POs open for Service Entry.

Select correct PO

Click Create Service Entry Sheet
Enter **Name, Add Attachment**, OPTIONAL: enter **Message to Customer**.

For PO with several items click on the black arrow to open the one you want to create Service Entry against. **Note:** You can only create Service Entry against one PO item at the time (multiple services lines is ok).

Enter **Quantity** per service line. Click **Update Prices** to display **Net value**.
Some POs may have the section **Account Assignment**. If this is the case you need Equinor accounts to specify where costs should be allocated. Contact Customer contact on PO if you don't have this information.

![Account Assignment](image)

**NOTE:** Click **Add Line** to split cost between several accounts. Click **Check Accounting** to verify that the account entered is valid.

Go back to top of screen and click **Confirm** to submit Service Entry for approval.

![Service Entry Sheet](image)

**NOTE:** If approval of service entry is not received within reasonable time contact [vendorportal@equinor.com](mailto:vendorportal@equinor.com)

### 4.3 How to create service invoice

Once a Service Entry is approved by Equinor customer then it is possible to create an invoice for it. Invoice baseline date is the date the Service Entry was created.

Click **Create**

Click **For a Service Entry Sheet**

Select one or more Service Entries as shown, then click on **Create Invoice**.

![List of Service Entry Sheets](image)

**NOTE:** You can only create Invoice against Service entries from a single PO.

**TIP:** Left-click on column header (e.g. **Purchase Order**) to filter list.

**TIP:** Click button under **Create Invoice** to select all Service Entries on list. Click again to deselect all.
Enter supplier invoice **Number**, select **Tax code** (check that you have the same Tax amount on the Vendorportal invoice as on the invoice in your own billing system) and press **Send**.

**Important:** For invoices using foreign currencies you need to specify the tax amount in local currency. Specify the amount and write the currency code (NOK) as shown below. If this is not done the invoice will be returned from Equinor.

**4.4 How to Create invoice against invoice certificate**

Invoice certificates are generally issued for hours recorded in Equinor's time writing system (CATS). Certificates are to some extent also issued for other areas such as waste handling. Certificates are issued by resource coordinators in Equinor.
Click **Create**

Click **For an Invoice certificate**

Select certificate and click **Create Invoice**

<table>
<thead>
<tr>
<th>Inv. Cert No.</th>
<th>Purchase Order</th>
<th>Created on</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>32091</td>
<td>4502984857</td>
<td>14 05 2014</td>
<td>Issued to Vendor Portal</td>
</tr>
<tr>
<td>32092</td>
<td>4502984857</td>
<td>14 05 2014</td>
<td>Issued to Vendor Portal</td>
</tr>
<tr>
<td>32093</td>
<td>4502984857</td>
<td>14 05 2014</td>
<td>Issued to Vendor Portal</td>
</tr>
</tbody>
</table>

**TIP:** Click on number to open and display certificate content.

### 4.5 How to create Credit Memo

Open the relevant invoice

Click **Create Credit Memo**

![Credit Memo](image)

**General Information**

- **Number:** 1214545487
- **Date:** 23 06 2016
- **Name:** ses_23062015_fase1
- **Status:** Document Set
- **Payment due Date:** 23 07 2015
- **Purchase Order No.:** 4503200475
- **Payment Reference:** 82200212759
- **Tax amount in local currency:** 0.00
- **Bank account:** 82200212759
Type the original invoice number and postfix (ex. INVOICENO_"CRE")

Click **Update Prices**

Click **Send**

Go to the PO and click **Create Invoice**
4.6 Status: Creation Completed

When a Purchase Order has changed the status to Creation Completed it is not possible to create Service Entry.

To activate the purchase order you have to contact the purchaser and ask for following changes:

- Update the delivery date (ex. to dato today)
- Remove the mark in Deliv. Compl (section Delivery)

The change of the purchase order will then be sent to the Vendorportal and get the status "In Process". You need to confirm the PO.
After confirming the purchase order the “Create Service Entry Sheet” button will show
5 User and company administration

5.1 Maintain your own user

In Vendor Portal you can change your own name and phone number. If you are missing access to confirm Purchase orders, submit Service Entries or submit invoices then you are missing one or more roles. You can get this from the person in your company with administrator access to the portal. If you need to change your email address then your administrator must delete your user and create a new one with the new email address. This is because email is your user ID.

Click Own Data

Click Process

Update name and/or phone number.
Scroll down to the end of the page and check boxes if you want to receive email notifications for new POs and/or Service Entry approvals.

5.2 Receive Alerts – email notification settings

At the bottom of the screen you can also change email notification settings. Each user has to do that themselves.

Click **Save** on top of the screen to save changes. Press **Cancel** to cancel changes.
5.3  Create new user

User with administrator role can create new users.

Click **Create Users**

Enter data in the following fields: **E-Mail Address**, **FormOfAddr**, **First Name**, **Last Name**, **Mobile Phone**, **Roles**.

Click **Save** to create user. Note: English is the only language supported.
5.4 Maintain user

Users with administrator role can maintain data for a user in own company.

Click Find User

Enter data to search for a specific user or enter * in **First Name** field to display complete list of users from your company.

Click on the pencil icon to change user. **NOTE:** You can also click on the trash can to delete a user, click on the closed padlock to lock the user, and then the open padlock to unlock the user.

Make changes are required. You can change name and phone number.
5.5 Set default tax code for invoice creation

Users with administration role can set default tax code for supplier so that it appears when an invoice is created. By doing so, user saves time changing tax code if the same code is used most of the time. Supplier is responsible for setting correct tax code so this is a function to simplify the task.

Click **Company Data**

Click **Change**
Select correct VAT (moms) code from drop-down menu. Click **Save** to save changes.
6  Statuses in Vendor portal

6.1  PO status in VP

<table>
<thead>
<tr>
<th>PO Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>This status is set automatically in SUS (Vendorportal) when a purchase order is received from the procurement system.</td>
</tr>
<tr>
<td>In Process</td>
<td>This status is set by the supplier when the supplier saves a PO that is being processed. Note that the PO confirmation has not been sent but only saved.</td>
</tr>
<tr>
<td>In Process</td>
<td>This status (in bold) is set automatically in SUS (Vendorportal) when a purchase order update/change is received from the procurement system</td>
</tr>
<tr>
<td>Confirmed</td>
<td>This status is set automatically when supplier confirms all of the items in a purchase order.</td>
</tr>
<tr>
<td>Partially Confirmed</td>
<td>This status is set automatically when supplier confirms some, but not all, of the items in a purchase order.</td>
</tr>
<tr>
<td>Rejected</td>
<td>This status is set automatically when supplier rejects all of the items in a purchase order.</td>
</tr>
<tr>
<td>Canceled by Customer</td>
<td>This status is set automatically if the purchaser deletes all the items in a purchase order</td>
</tr>
<tr>
<td>Creation Completed</td>
<td>Purchaser changed status on PO to Delivery Completed</td>
</tr>
</tbody>
</table>

6.2  SES status in VP

<table>
<thead>
<tr>
<th>Service Entry Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Process</td>
<td>This status is set automatically set when a confirmation is created and then saved. Note that the Service Entry has not been sent but only saved. The service items will also have status In Process.</td>
</tr>
<tr>
<td>Completion Reported</td>
<td>This status is set automatically after the Service entry has been confirmed. The service items will have status Sent</td>
</tr>
<tr>
<td>Rejected by Customer</td>
<td>This status is set automatically when the requisitioner or task manager rejects a service entry. The service items will have status Cancelled</td>
</tr>
<tr>
<td>Accepted by Customer</td>
<td>This status is set automatically when the requisitioner or task manager accepts a Service Entry. The service items will have status Accepted</td>
</tr>
</tbody>
</table>