

# Claim for Payment

## Supplier Portal - Quick Reference Sheet

### Overview

This Quick Reference Sheet (QRS) demonstrates how to submit a Claim for Payment through the Supplier Portal.

### Things You Need To Know

Users are required to be registered as a Supplier and have a logon User ID for the Supplier Portal. Users also require a valid purchase order from which to claim.

Progress claims are also entered from this transaction but work slightly differently.

### Features Covered

- Entering Claim Details and Claim Documentation
- Add Items
- View Claim History
- Claim against a Miscellaneous Line Item
- Progress Claim

### Entering Claim Details and Claim Documentation

1. From the **Supplier Transactions** menu click **Claim for Payment**.



2. The **Claim for Payment** screen displays.  
Either:
  - Enter purchase order number in **PO Number** field, if known;
  - Click **Get Order**.Or
  - Click **Search** button to view a list of open purchase orders;
  - Click on **Purchase Order** number that relates to your claim.

A screenshot of the 'Claim for Payment' web form. The form has a header with a title and a brief instruction. Below the header, there are two informational messages: one stating the claim will be submitted to the contact person for approval, and another instructing the user to enter their purchase order number and press 'Get Order'. There are two buttons: 'Get Order' and 'Search'. The form is divided into sections: 'Purchase Order Details' with fields for Number, Name, Version, Issued, Contact Person, Email, and Phone; 'Claim Details' with fields for Claim No., Description, Delivery/Performance Date, and Your Reference. At the bottom, there are tabs for 'Claim Details' and 'Claim Documents'. A table is present with columns for PO Details, Approved Claims, Remaining To Claim, and This Claim (EX GST), with sub-columns for Quantity and Amount. At the bottom right, there is a 'Claim in Full' button and a total amount field showing 0.00. At the very bottom, there are 'Check', 'Save', 'Submit', and 'Claim History' buttons.

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The **Claim for Payment** screen will populate with purchase order details and related claim information.

**Note:** Goods items which have been fully claimed on this purchase order are not displayed.

- In **Description** field, enter a short description of the goods or service provided, plus any relevant sales order number, delivery docket number, etc.
- In **Your Reference** field, enter your invoice or claim number. When payment is made, this number will appear on your bank statement.

**Note:** Enter the invoice number exactly as it appears on the actual invoice. E.g. invoice number 0000123 should be entered as such, complete with leading zeros and not as 123 or INV 123.

- On the **Claim Details** tab, either:
  - Claim the full amount, click the **Claim in Full** button;
  - Claim a partial amount/s, add the **Quantity** to be claimed in the orange quantity field for each item;
  - Select **Enter** on your keyboard to view the **Amount** (ex GST) claimed for the item.

**Note:** GST will be calculated and displayed directly underneath.

The **Claim Documents** tab is where you can add comments and attach documentation.

- To add comments, directly enter into the **Supplier Remarks** field.
- To add documents, click the **Browse** button.
- Locate** and **Select** the document on your computer, then click **Attach**.
- Click **Save** and submit at a later time; or
- Click **Submit** to register the claim.

The **Submit Claim** window opens stating that your claim has been successfully submitted.

- Click **OK**.  
An email will be sent to the Contact Person on the purchase order for approval.

No	Description	Quantity	Unit	EA	Amount	Quantity	Amount	Quantity	Rate	Amount
1	CORING - 3X180MM DIA 1X12...	8,000	EA	8,000	1,170.00	2,000	390.00	2,000	195.00	390.00
2	CORING-2 X125MM CORED...	2,000	EA	0,000	0.00	2,000	390.00	2,000	195.00	390.00

Document Name	File	Type	Size(Kb)	Entered On	Action

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### Add Items

You have the ability to add items to your claim. This may be for incidental expenses incurred that were not on the original purchase order.

1. Click the **Add Items** button.

Claims Details (Inv)

Claim No: 8000422444 Description: \*CORING UNITS DIN 574321  
Claim Date: 14.04.2016 Your Reference: \*123456 This will appear on your bank statement

Claim Details Claim Documents

No	Description	PO Details		Approved Claims		Remaining To Claim		This Claim (EX GST)		
		Quantity	Unit	Quantity	Amount	Quantity	Amount	Quantity	Rate	Amount
1	CORING - 3X180MM DIA 1X12...	8,000	EA	8,000	1,170.00	2,000	390.00	2,000	195.00	390.00
2	CORING- 2 X125MM CORED ...	2,000	EA	0.000	0.00	2,000	390.00	2,000	195.00	390.00

Add Item(s) Claim in Full (Prices are exclusive of GST) Total: 780.00  
GST: 78.00  
Total + GST: 858.00

Cancel Check Save Submit Claim History

The **Claim Details** window opens.

2. Add the **Unit, Quantity** and (ex GST) **Rate** for the item/s.
3. Click **OK**.

Claim Details

Add Items

In this screen you are able to claim for additional items you have supplied that have not been included in your purchase order. These extra items will require approval before payment can be made.

Description*	Unit*	Quantity*	Rate*	Amount	Taxable	Action
Extra Fittings for CORING	Box	2	50.00	100.00	<input checked="" type="checkbox"/>	Delete
		0.000	0.00	0.00	<input checked="" type="checkbox"/>	Delete
		0.000	0.00	0.00	<input checked="" type="checkbox"/>	Delete
		0.000	0.00	0.00	<input checked="" type="checkbox"/>	Delete
		0.000	0.00	0.00	<input checked="" type="checkbox"/>	Delete

Cancel OK

The **Claim Documents** tab is where you can add comments and attach documentation.

4. To add comments, directly enter into the **Supplier Remarks** field.
5. To add documents, click the **Browse** button.
6. **Locate** and **Select** the document on your computer, then click **Attach**.
7. Click the **Check** button to verify the amount being claimed. This will also provide you with a list of messages of missing or incorrect information.
8. Click **Save** and submit at a later time, or
9. Click **Submit** to register the claim for payment.

Claim Details Claim Documents

Supporting Information (e.g. timesheets, declarations, invoices)

Supplier Remarks: Add Comments (250 chars max.):

Document Name: Path: Browse

Attach

Document Name	File	Type	Size(Kb)	Entered On	Action
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The **Submit Claim** window opens stating that your claim has been successfully submitted.

10. Click **OK**.  
An email will be sent to the Contact Person on the purchase order for approval.

Your claim will be submitted to the Contact Person for approval

Enter your Purchase Order number and press 'Get Order' to start the claim process

PO Number: 4200297783 Get Order Don't know your PO Number? Search

Purchase Order Details

Number: 4200297783 Name: PRECAST CONCRETE Version: 4 Issued: 06.05.2015  
Contact Person: Liana Giuffre Email: LIANA.GIUFFRE@WATERCORPORATION.COM Phone: (08) 9489 9253

Claims Details (Inv)

Claim No: 8000422444 Description: \*CORING UNITS  
Claim Date: 14.04.2016 Your Reference: \*123456 This will appear on your bank statement

Claim Details Claim Documents

No	Description	PO Details		Approved Claims		Remaining To Claim		This Claim (EX GST)		
		Quantity	Unit	Quantity	Amount	Quantity	Amount	Quantity	Rate	Amount
1	CORING - 3X180MM DIA 1X12...	8,000	EA	8,000	1,170.00	2,000	390.00	2,000	195.00	390.00
2	CORING- 2 X125MM CORED ...	2,000	EA	0.000	0.00	2,000	390.00	2,000	195.00	390.00
3	Extra Fittings for CORING	0.000	BOX	0.000	0.00	0.000	0.00	2,000	50.00	100.00

Add Item(s) Claim in Full (Prices are exclusive of GST) Total: 880.00  
GST: 88.00  
Total + GST: 968.00

Cancel Check Save Submit Claim History

Claim contains additional items not included on PO. Your claim can still be submitted.

Submit Claim

Your claim has been successfully submitted

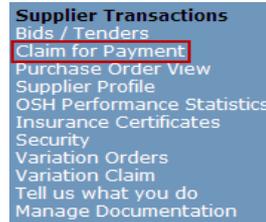
OK

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### View Claim History

1. Click **Claim for Payment**.



The **Claim for Payment** screen displays.

2. **Either:**

- Enter purchase order number in the **PO Number** field, is known;
- Click **Get Order**.

Or

- Click **Search** button to view a list of open purchase orders;
- Click on **Purchase Order** number that relates to your claim.

PO Number:  **Get Order** Don't know your PO Number? **Search**

**Purchase Order Details**  
Number:  Name:  Version:  Issued:   
Contact Person:   Email  Phone:

**Claim Details**  
Claim No:  Description: \*   
Delivery / Performance Date: \*  Your Reference: \*  This will appear on your bank statement

**Claim Details** | Claim Documents

		PO Details		Approved Claims		Remaining To Claim		This Claim (EX GST)		
No	Description	Quantity	Unit	Quantity	Amount	Quantity	Amount	Quantity	Rate	Amount

**Claim In Full** (Prices are exclusive of GST) Total:  0.00

**Check** **Save** **Submit** **Claim History**

The **Claim for Payment** screen will populate with the purchase order details and related claim information.

3. Click **Claim History**.

PO Number: 4200267783 **Get Order** Don't know your PO Number? **Search**

**Purchase Order Details**  
Number: 4200267783 Name: PRECAST CONCRETE Version: 4 Issued: 06.05.2015  
Contact Person: Liana Giuffre  Email  Email LIANA.GIUFFRE@WATERCORPORATION.COM Phone: (08) 9489 5283

**Claims Details (Inv)**  
Claim No: 6000422409 Description: \*   
Claim Date: 13.04.2016 Your Reference: \*  This will appear on your bank statement

**Claim Details** | Claim Documents

		PO Details		Approved Claims		Remaining To Claim		This Claim (EX GST)		
No	Description	Quantity	Unit	Quantity	Amount	Quantity	Amount	Quantity	Rate	Amount
1	CORING - 3X180MM DIA 1X12...	8.000	EA	8.000	1,170.00	2.000	390.00	0.000	195.00	0.00
2	CORING-2 X125MM CORED ...	2.000	EA	0.000	0.00	2.000	390.00	0.000	195.00	0.00

**Add Item(s)** **Claim In Full** (Prices are exclusive of GST) Total:  0.00  
GST:  0.00  
Total + GST:  0.00

**Cancel** **Check** **Save** **Submit** **Claim History**

Goods items which have been fully claimed on this purchase order are not displayed

The **Claim History** screen appears and displays all submitted claims and their status.

**Note:** Click on the claim name to display the details.

4. Click **Cancel** to return to the claim screen.

Use the search functionality to find a purchase order or claim number not on the initial list

Click on the claim number to view details

Claim No	Description	Your Reference	Status	Claim Date	PO No
6000422441	CORING UNITS D1N 474321	123456	Awaiting Approval	13.04.2016	4200267783
6000285238	ROCLA PIPELINE PRODUCTS - Oct 2014	852089	Approved	06.10.2014	4200267783

Enter search details if the Claim you want is not shown in the list above

Claim Number	Claim Description	Your Reference	Claim Status
Purchase Order No.	Purchase Order Name	Claim Date From	Claim Date To
4200267783			

**Cancel** **Search**

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### Claim against a Miscellaneous Line Item

Some purchase orders have been created with a miscellaneous line item to allow for incidental expenses. The quantity is set to the total value allowed for the purchase order and the rate is set to \$1.

To claim against a miscellaneous line:

1. Enter the amount (ex GST) to be claimed into the orange **Quantity** field.
2. Select **Enter** on your keyboard.
3. Review the **Amount** column.

**Note:** GST will be calculated and displayed directly underneath.

4. Click **Claim Documents** tab.
5. To add comments, directly enter into the **Supplier Remarks** field.
6. To add documents, click the **Browse** button.
7. **Locate** and **Select** the document on your computer, then click **Attach**.
8. Click **Save** and submit at a later time; or
9. Click **Submit** to register the claim.

The **Submit Claim** window opens stating that your claim has been successfully submitted.

10. Click **OK**.

An email will be sent to the Contact Person on the purchase order for approval.

No	Description	Quantity	Unit	Amount	Quantity	Amount	Quantity	Rate	Amount	
1	CORING - 3X180MM DIA. 1X12...	8.000	EA	0.000	1,170.00	2.000	390.00	2.000	195.00	390.00
2	CORING- 2 X125MM CORED ...	2.000	EA	0.000	0.00	2.000	390.00	2.000	195.00	390.00
3	Misc Items	200,000.00	EA	0.000	0.00	200.000	200.00	50,000.00	1.00	50.00

Document Name	File	Type	Size(Kb)	Entered On	Action

**Submit Claim**

Your claim has been successfully submitted

OK

### Progress Claim

Submitting a progress claims works slightly differently and the screens are different in the following areas:

- GST is not applicable when submitting your progress claim.
- You are able to change or delete the progress claim up until it has been approved.
- You are able to enter the delivery / performance date for the progress claim.

1. **Description** - enter a description that easily identifies the claim e.g. Progress Claim No/month/year.
2. **Your Reference** - progress claim month and year. (This will show on your bank statement).

No	Description	Quantity	Unit	Amount	Quantity	Amount	Quantity	Rate	Amount	
1.1	Contractor's preliminaries	192,993.000	PU	192,993.00	0.000	0.00	80,000.000	1.00	80,000.00	
2	1.2 Commissioning	3,975.000	PU	3,975.00	0.000	0.00	80,000.000	1.00	80,000.00	
3	2.2 Provisional quantities	19,271.250	PU	14,298.320	14,298.32	4,972.930	4,972.93	0.000	1.00	0.00
4	2.3 DN450-S25 SEWER P...	414,740.700	PU	414,740.700	0.000	0.00	0.000	1.00	0.00	
5	CTF levy	0.010	PU	0.010	0.01	0.000	0.00	0.000	1.00	0.00

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3. Click **Claim Documents** tab.
4. To add comments, directly enter into the **Supplier Remarks** field.
5. To add documents, click the **Browse** button.
6. **Locate** and **Select** the document on your computer, then click **Attach**.

Document Name	File	Type	Size(Kb)	Entered On	Action
APRIL 2016 Statutory Declaration	APRIL 2016 Statutory Declaration.docx	docx	19	14.04.2016	Remove

7. **Either:**
  - Click **Save** and submit at a later time (The claim status will change to Held);
  - or
  - Click **Submit** to register the claim.

The **Submit Claim** window opens stating that your claim has been successfully submitted.

8. Click **OK**.

Claim No	Description	Your Reference	Status	Claim Date	PO No
800067246	PROGRESS CLAIM APRIL 2016	APRIL 2016	Held	14.04.2016	4200286932
8000638316	Progress Claim No. 1 - July	800/2102 CL1	Approved	31.07.2015	4200286932
8000641476	Progress Claim No. 2 - August	800/2102 CL2	Rejected	28.08.2015	4200286932

The claim status will change to **Awaiting Approval**.

Claim No	Description	Your Reference	Status	Claim Date	PO No
800067246	PROGRESS CLAIM APRIL 2016	APRIL 2016	Awaiting Approval	14.04.2016	4200286932
8000638316	Progress Claim No. 1 - July	800/2102 CL1	Approved	31.07.2015	4200286932
8000641476	Progress Claim No. 2 - August	800/2102 CL2	Rejected	28.08.2015	4200286932