



Submitting an SDP

Service delivery updates and invoicing

The Service Delivery Plan (SDP) is the framework through which the contract is managed. You will need to submit a service delivery update – including billable value- within the SDP for each of the agreed milestones as per the schedule agreed.

Once submitted, the contract manager will review and either approve – triggering the self-billed invoice – or reject, providing you with comments for further action.

As per our self-billing arrangement, you do not need to submit an invoice. The self-billed invoice will be generated following approval of your submission and will be available to view via the Finance Portal.




1. **SDP Milestones Overview** (Page 2)
2. **Completing a request for payment** (Page 4)
 - Find the service update actions
 - Select the contract milestone
 - Complete the request for payment
 - Confirm the invoice amount
 - Save and submit
3. **Approved updates** (Page 8)
 - Email notification
 - Confirm approval
4. **Rejected updates** (Page 9)
 - Email notification
 - Review and revise the update

SERVICE DELIVERY PLAN (SDP) MILESTONES

- Service Delivery Plans (SDPs) are setup with project delivery milestones aligned to the Payment Schedule as agreed within the work order.
- For each milestone, you can submit a request for payment in line with the deliverables of the project.
- Once the submission has been approved, a self-billed Purchase Invoice will be generated, accessible via the Bloom Finance Portal.
- The system will display two action types:
 - SDP Line: This is where you as the supplier submit a request for payment and highlight report
 - Approval Line: This is where the buyer will approve or reject the supplier SDP. Once approved, payment terms begin.

Submitting an update




- When both lines are 'In Progress' nothing has yet been submitted. You can click into the line to submit.

	Action Name	Supplier Action Owner	Action Status (Icon)	Action Status	Allow Owner Start	Action Start Date	Action End Date
1	BD E2E 20.3 - SDP Month 1	(Default) 		In Progress	Yes	23/10/2020	22/11/2020
2	BD E2E 20.3 - APPROVAL Month 1	(Default)		In Progress	Yes	23/10/2020	22/11/2020

Project Name	Action Type /Milestone	Milestone dates as per the Work Order
--------------	------------------------	---------------------------------------




Awaiting buyer approval

- When you have submitted your SDP update, it will change to 'Completed'. **It must show as completed to have been submitted.**
- The buyer approval line will display as 'In Progress' which means it is waiting for the buyer to action.

	Action Name	Supplier Action Owner	Action Status (Icon)	Action Status	Allow Owner Start	Action Start Date	▲ Action End Date
1	BD E2E 20.3 - SDP Month 1	(Default) 		Completed	Yes	23/10/2020	23/10/2020
2	BD E2E 20.3 - APPROVAL Month 1	(Default)		In Progress	Yes	23/10/2020	22/11/2020

Buyer approval

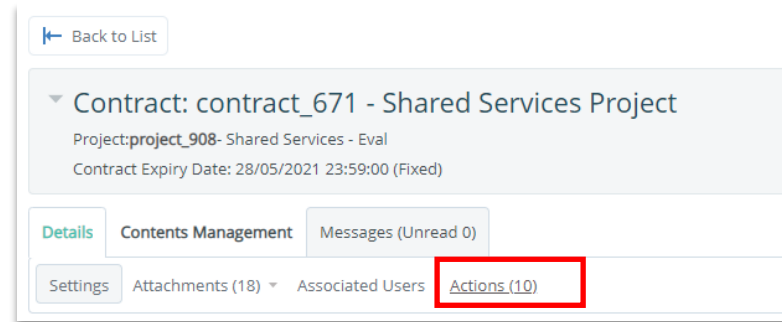
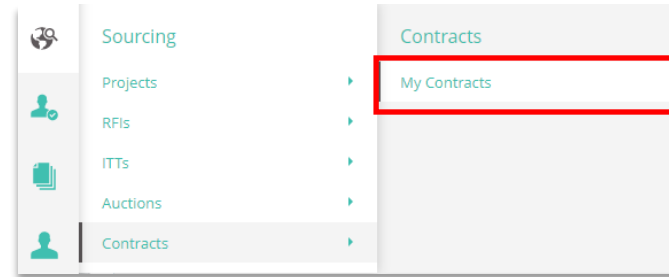
- When both lines are showing as 'Completed' your submission and has been approved. A self-billed invoice will be generated.

	Action Name	Supplier Action Owner	Action Status (Icon)	Action Status	Allow Owner Start	Action Start Date	▲ Action End Date
1	BD E2E 20.3 - SDP Month 1	(Default) 		Completed	Yes	23/10/2020	23/10/2020
2	BD E2E 20.3 - APPROVAL Month 1	(Default)		Completed	Yes	23/10/2020	26/10/2020

COMPLETING A REQUEST FOR PAYMENT

Find the service update actions

- Go to sourcing > Contracts
- Find the project and click to access
- Click details > Actions to see all the project milestone actions



Select the contract milestone you are submitting against.

- Click to access the submission/SDP line for the milestone you wish to submit against

5	Design SDP	(Default)			In Progress	Yes	28/01/2021	12/03/2021
6	Design Approval	(Default)			In Progress	Yes	28/01/2021	16/03/2021

Complete the service update

➤ Scroll down and click 'Edit Values'

Section 1 is **Financial Information**

- Payment schedule line number
- Milestone name
- Total milestone value agreed in the WO
- The remaining value on the line (total minus any part payments)

The screenshot shows a 'Collaboration Form' with a table of financial information. The table has three columns: Question, Description, and Response. The 'Response' column contains numerical values and text. A blue 'Edit Values' button is located in the top right corner.

Question	Description	Response
PO Line Description	Relevant PO line description linked to this action item	Payment Schedule 2
Total Agreed Payment Schedule Value	The value shown here is the total value of this payment schedule which matches your Purchase Order.	12000.00
Remaining Value Available	The value shown here is the remaining balance available for you to submit for approval in your Service Delivery Plan. This matches your Purchase Order. If you have partially invoiced against this line previously, the figure displayed will be updated to show the maximum remaining available value for this payment schedule. Please note that you cannot submit your Service Delivery Plan requesting a payment for more than the value shown here. Requests for additional payment need to go through change control.	12,000

Section 2 relates to **Invoicing**

Invoice Value is the amount you must approve for invoicing and payment.

➤ Input you invoice value

It must be Net of VAT and be equal to or less than the remaining value displayed above.

The screenshot shows a table with three columns: Question, Description, and Response. The 'Response' column contains an input field with a currency symbol (€) and a dropdown arrow.

Question	Description	Response
Invoice Value	Please input the amount you would like to invoice. (EXCLUDING VAT - But INCLUDE the Management Fee) Ensure the amount you are invoicing for does not exceed the amount available on this payment schedule line, as stated within the "Remaining Value Available" section.	<input type="text"/> €

Expenses may be included with the submission

- Select 'Yes' if you wish to include expenses
- Input Expenses value
- Attach receipts if required

Section 3 relates to a **project status** update

- Confirm delivery of outcomes as expected
- Status of delivery
- Trend in delivery
- Overview of key deliverables for the milestone
- Overview of key deliverables for the next milestone

Question	Description	Response
Outcome Delivery	Do you confirm that you have delivered all outcomes detailed in the work order as expected for this reporting period?	Yes
What is the current status of delivery for this project	Please select from the 3 options, what is the current status of delivery for this project: On track / Minor Delays / Major Delays	On track
What is the trend in status of delivery since last report	Please select from the 3 options, what is the trend in status of delivery since last report: No change / Better / Worse	No change
Key deliverables / activities in this period	Please enter key deliverables / activities in this period	Discovery <small>Characters available 1990</small>
Key deliverables / activities planned next period	Please enter key deliverables / activities planned next period	Implementation <small>Characters available 1985</small>

Save the submission

- Once all questions are answered, scroll to the top of the page.
- Click 'Save'
- You can now review your answers and check everything is accurate

The screenshot shows a 'Collaboration Form' with a table of questions and responses. The 'Save' button is highlighted with a red box. The table contains the following information:

Question	Description	Response
What is the current status of delivery for this project?	Please select from the 3 options, what is the current status of delivery for this project: On track / Minor Delays / Major Delays	On track
What is the trend in status of delivery since last report?	Please select from the 3 options, what is the trend in status of delivery since last report: No change / Better / Worse	No change
Key deliverables / activities in this period	Please enter key deliverables / activities in this period	Design document
Key deliverables / activities planned next period	Please enter key deliverables / activities planned next period	Development of system and test plan

Submit the SDP update

- At the top of the page, click "complete action"
- You must then click 'Complete Action' for a second time
- Only when the line has changed to a status **completed** has the request for payment been sent to the buyer

This has now sent the update to the contract owner for review.

The screenshot shows the 'Action: Project_700 Professional Services Supplier Submission - March 2020' page. The 'Complete Action' button is highlighted with a red box. The page includes a 'Back to List' link, a 'Cancel Action' link, and a 'Messages (Unread 0)' link. The 'Collaboration Overview' section contains an 'Action Description' and a 'Buyer Attachments' section with 'No Attachments'.

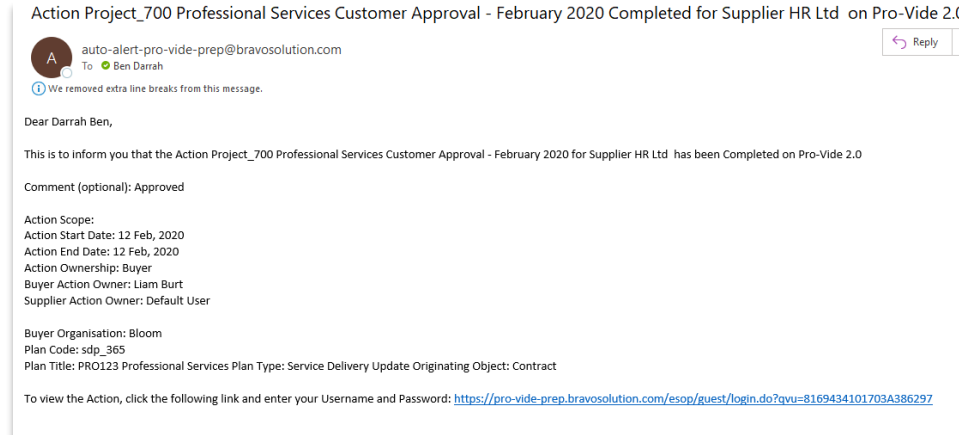
APPROVED UPDATES- Updates approved by the buyer, initiating the invoicing process

You will receive an approval email

Once confirmed, the invoicing process will begin.

Bloom are committed to paying within 30 days of approval.

Your purchase invoice will be available within the finance portal within 24 hrs



To confirm the approval, review the buyer actions

- Click into Sourcing > Contracts > My Contracts
- Find you project > Click Actions
- The Approval line will be at status **Completed**

1	Review - SDP	(Default)			Completed	Yes	28/01/2021	16/02/2021
2	Review - Approval	(Default)			Completed	Yes	28/01/2021	16/02/2021

REJECTED UPDATES - Updates rejected by the contract owner, initiating a request for further information

You will receive a notification email from Pro-Vide 2

- The comment will detail the reasons for the rejection that will need responding to
- Click into the link to take you to the action

Dear Darrah Ben,

This is to inform you that the Action Project_700 Professional Services Supplier Submission - February 2020 for Supplier HR Ltd has been Started or Reopened on Pro-Vide 2.0

1 Comment (optional): Rejected, invoice amount is too high

Action Scope:
 Action Start Date: 12 Feb, 2020
 Action End Date: 13 Mar, 2020
 Action Ownership: Supplier
 Buyer Action Owner: Liam Burt
 Supplier Action Owner: Default User

Buyer Organisation: Bloom
 Plan Code: sdp_365
 Plan Title: PRO123 Professional Services Plan Type: Service Delivery Update Originating Object: Contract

To view the Action, click the following link and enter your Username and Password: **2** <https://pro-vide-prep.bravosolution.com/esop/guest/login.do?quu=3184205701703A1A932D>

Please do not reply to this message. This is an automated email alert and replies to this message are routed to an unmonitored mailbox.

You can also find the action within your contract actions.

Note: The action status will be **green** and in progress

Enter Filter (type to start search)

Filter Details ▶

Action Name	Supplier Action Owner	Action Status (Icon)	Action Status	Allow Owner Start
1 Project_700 Professional Services Supplier Submission - February 2020	(Default)		In Progress	Yes
2 Project_700 Professional Services Supplier Submission - April 2020	(Default)		In Progress	Yes
3 Contract_xx SDP - Month 4	(Default)		In Progress	Yes
4 Contract_xx SDP - Month 3	(Default)		In Progress	Yes
5 Contract_xx SDP - Month 2	(Default)		In Progress	Yes
6 Contract_xx SDP - Month 3	(Default)		In Progress	Yes

Review and revise the service update

1. Click 'edit' in the update action
2. Review and revise the update as required .

Question	Description	Response
What is the current status of delivery for this project	Please select from the 3 options, what is the current status of delivery for this project: On track / Minor Delays / Major Delays	On track
What is the trend in status of delivery since last report	Please select from the 3 options, what is the trend in status of delivery since last report: No change / Better / Worse	No change
Key deliverables / activities in this period	Please enter key deliverables / activities in this period	x
Key deliverables / activities planned next period	Please enter key deliverables / activities planned next period	s

Save and complete the action

1. Click 'save'
2. Click 'complete action' twice at the top of the page

This will resubmit the update to the contract owner for review.

Complete Action