



Supplier Finance Portal Accessing Sales Orders & Invoices

From the Finance Portal you can access all Sales Orders and Invoices for your Bloom projects. The portal requires a separate login to the project side of the system and once set up, you can create new user accounts for finance users and additional members of your team.

Your lead contact will receive an invite to the finance portal upon awarding of your first project with Bloom. If you do not setup an account at that time, Bloom can re-invite the lead contact at any time (it must be the same contact for security purposes).

Once set up, all invoices and sales orders prior to creation of your account will be accessible from the portal.

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CREATING A PORTAL ACCOUNT

Start Registration

- You will receive an invitation email to the Bloom contract lead – the user who setup the Bloom account.
- Click 'register now'.
- Once on the portal landing page, click 'Continue with Registration'

If you haven't received an invite, please contact suppliers@bloom.services

Supplier Invitation for Bloom

Dear Bloom Supplier 05,

Bloom has invited you to register on our Pro-vidé 2.0 order and invoice management system. Registering will allow you to view your organisations' purchase orders and invoices. You will also be able to add additional users to your account as required.

Register Now

Thank You,

Bloom

Register Details

- Complete your registration details.

! The phone number will require a country code +44 (then remove the first '0')

- Click Create an account

This will create you an Invoice Portal login. This is different to your Pro-Vide 2.0 Login.

The screenshot shows a registration form with the following sections:

- Your Contact Info:**
 - First Name: Jim
 - Last Name: Hilly
 - Title: Mr
 - Phone Number: +447951762123 (with an 'ext.' field)
 - Preferred Time Zone: BST/GMT - Greenwich Mean Time (Europe/London)
- Your Login:**
 - Email: bloomsupplier06@gmail.com
 - Password: [masked]
 - Re-Enter Password: [masked]
 - Account Recovery Question: What was the name of your elementary school?
 - Answer: [masked]
 - Confirm Answer: [masked]

A blue button labeled "CREATE ACCOUNT" is at the bottom.

Complete Registration

- Company Overview
- Business Details – can ignore
- Addresses
- Contacts
- Certify & Submit

! The phone number will require a country code +44 (then remove the first '0')

The screenshot shows the 'Company Overview' registration page for 'Bloom Supplier 10'. The page has a left-hand navigation menu with 'Company Overview' selected. The main content area contains a form with the following fields and options:

- Country of Origin: United Kingdom (dropdown)
- Does your business have a DUNS number?: Yes (radio), No (radio)
- Tax ID Number: Bloom Test Supplier 03 (text input)
- VAT Registration Number: (text input)
- VAT Exempt: Yes (radio), No (radio)
- Supplier Tax Representative ID: (text input)
- Commercial Registered Court: (text input)
- Supplier Registered Seat: (text input)
- Supplier Commercial Registration Number: (text input)

At the bottom right, there are buttons for '< Previous', 'Next >', and 'Save Changes'.

LOCATE INVOICES

Go to Orders

- From the left-hand navigation, go to the orders icon



- Select 'Sales Invoices' > 'Search for Sales Invoices'
- You can search on project or milestone name using the search function.

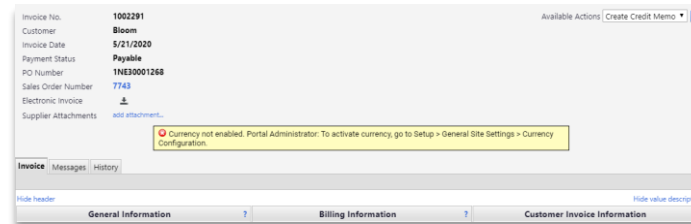
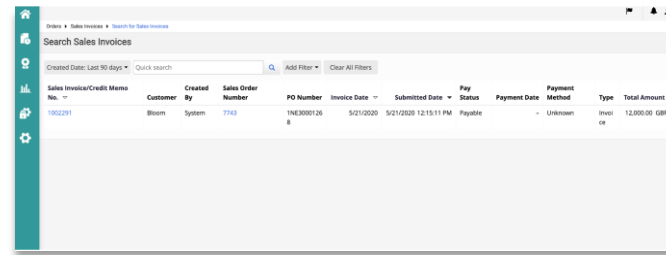
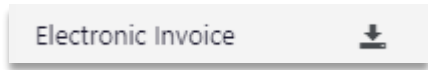
The screenshot shows the 'Orders' section of the portal. The left-hand navigation menu has 'Orders' selected. The main content area is divided into several sections:

- Orders**: A search bar with the text 'Type to Search Sales Orders...' and a search icon.
- Sales Orders And Shipments**: A dropdown menu with options 'View Draft Sales Invoices' and 'Create Sales Invoice'.
- Sales Invoices**: A dropdown menu with the option 'Search for Sales Invoices'.
- Common Tasks**: A section with a search bar and a 'Profile' link.
- Contracts**: A section with the text 'No Results' and a 'View All Contracts' link.
- Find Invoice**: A section with a search bar and a 'Find Invoice' button. Below the search bar, there is a note: 'To check payment status of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the "Search" button.' and 'Advanced Search'.

Locate your invoice


NB. Historical invoices (prior to account creation) are visible, however you may need to wait for a few moments

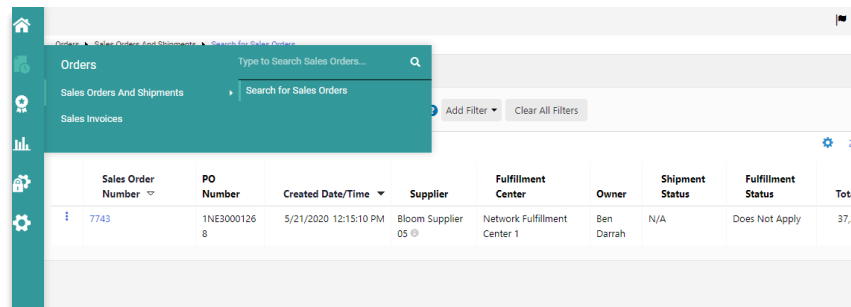
- To see invoice detail, click into the invoice number
- Here you can download a PDF copy of the invoice

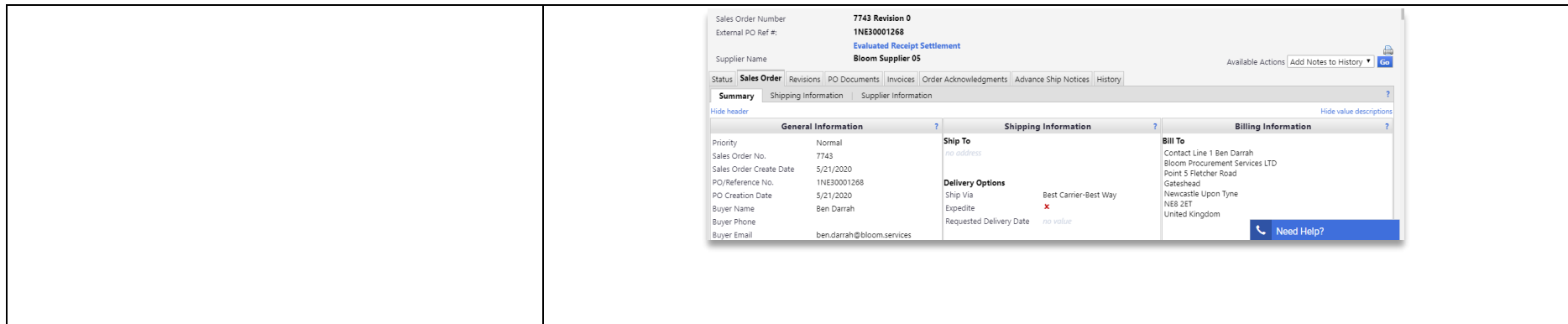


LOCAL SALES ORDER

Go to Sales Order Panel

- Go to the orders icon 
- Click 'Sales Orders and Shipments'
- 'Search for Sales Orders'





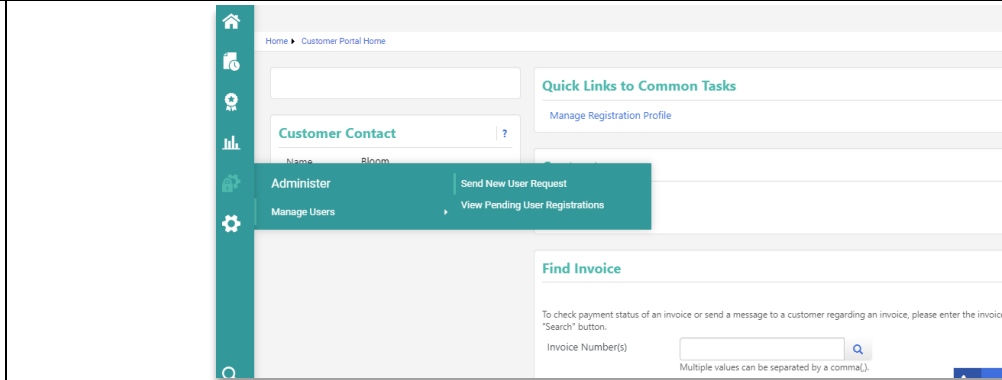
ADD USER

Create User Account

- Go to Administer via the left navigation



- Manage Users > Send New User Request



Complete user details and send

- Input the users details
- Send User Request

This will send an email to the user who can then set up their account.

