

# Reference Guide *Supplier Portal*

2025

BDO USA, P.C, a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

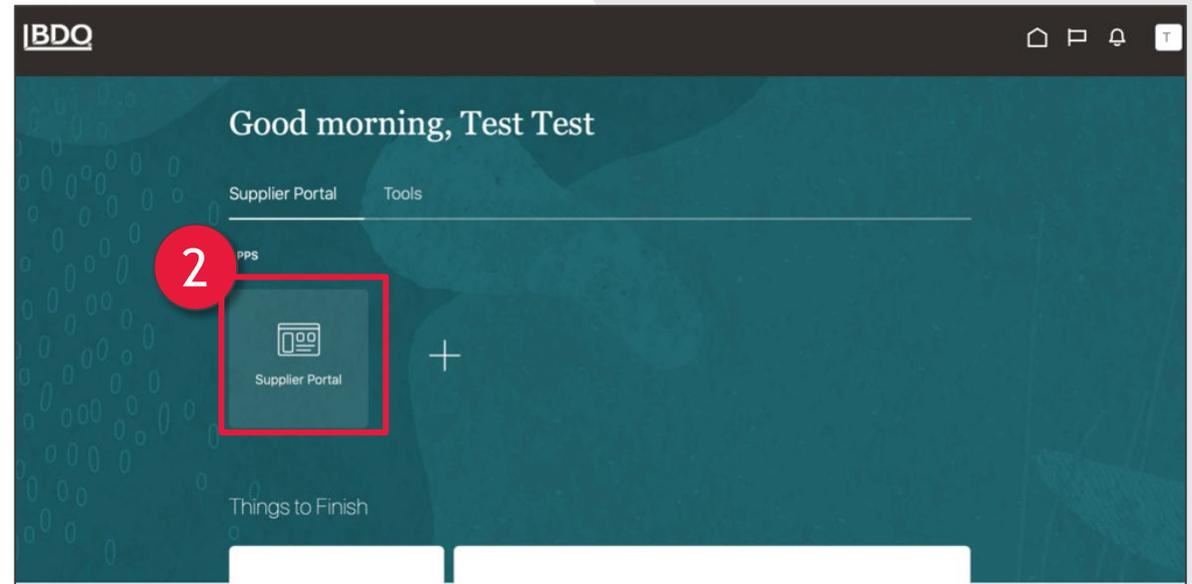
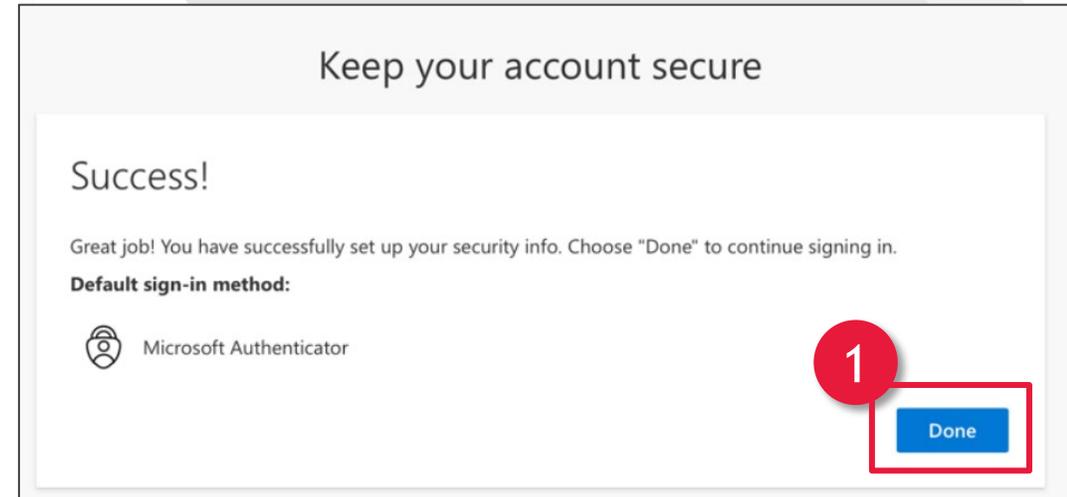


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# Navigation to Supplier Portal

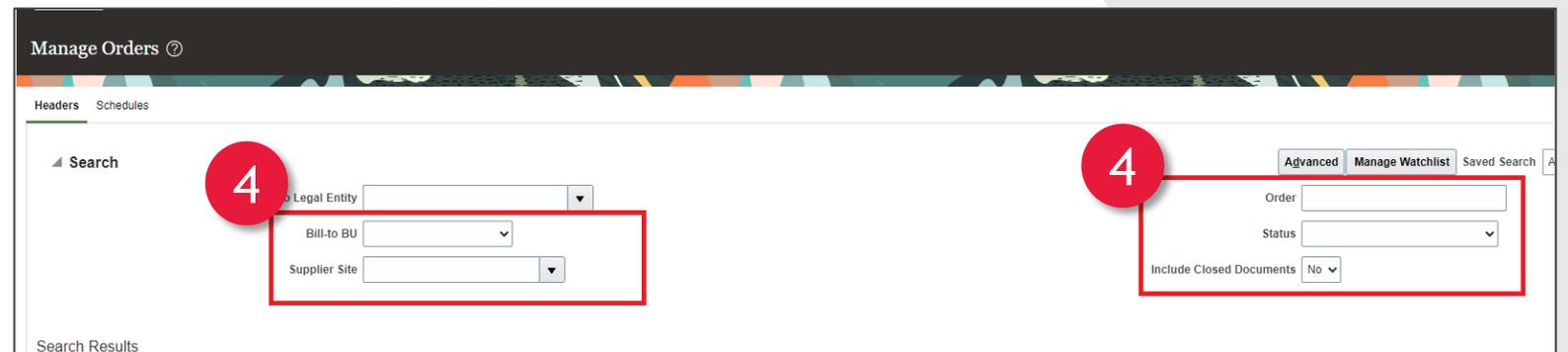
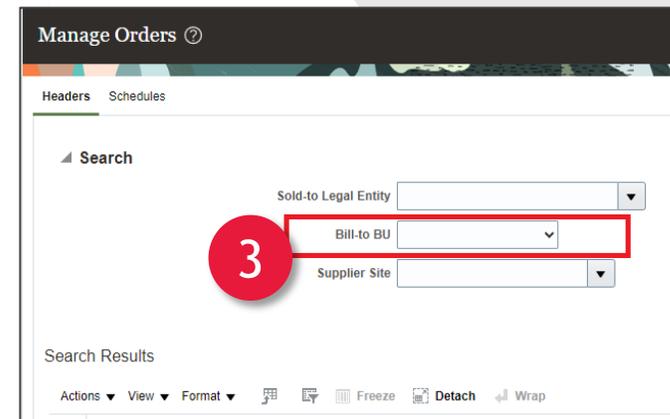
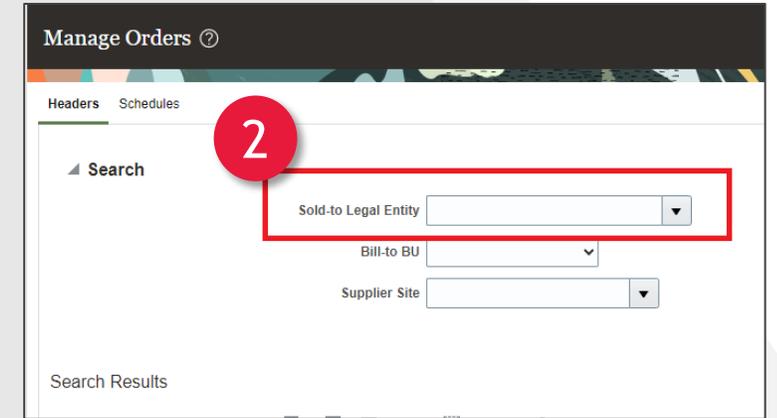
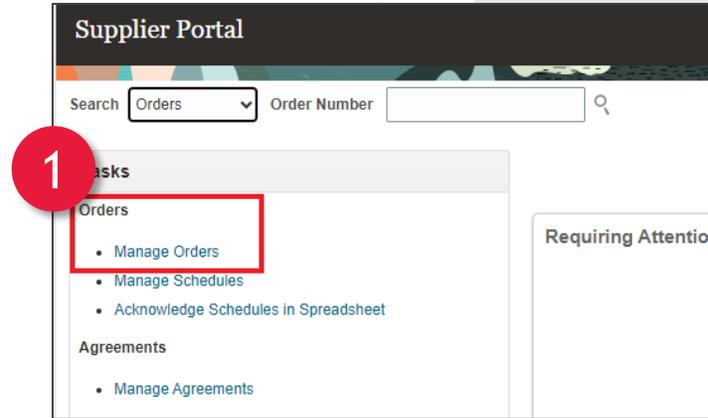
1. Complete the Microsoft Authenticator registration and select **Done**
2. On the Supplier Portal tab select the **Supplier Portal** tile



# Manage Orders

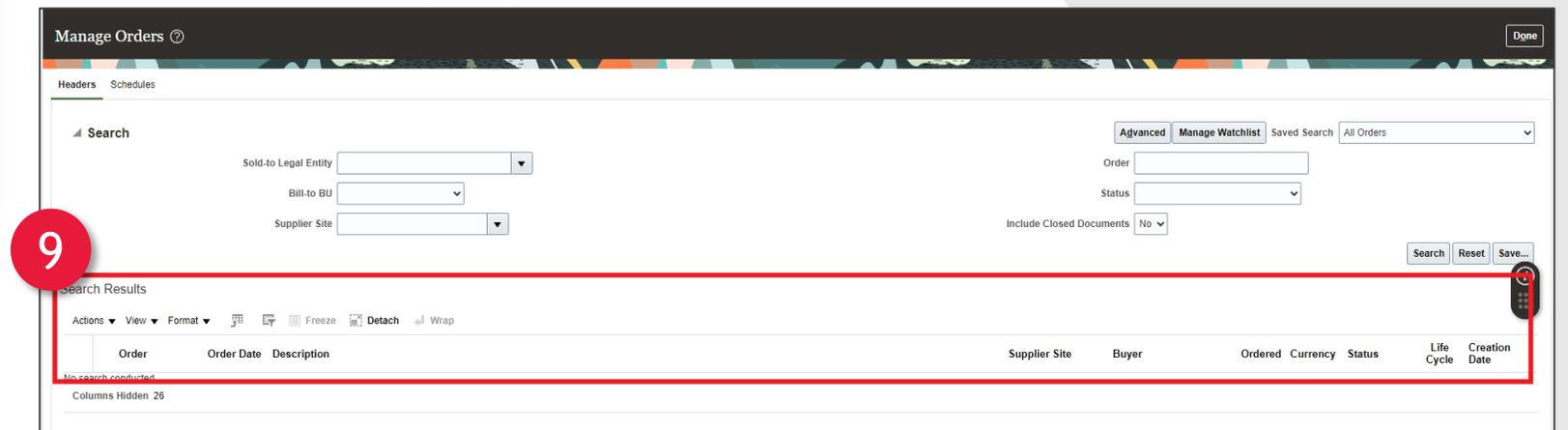
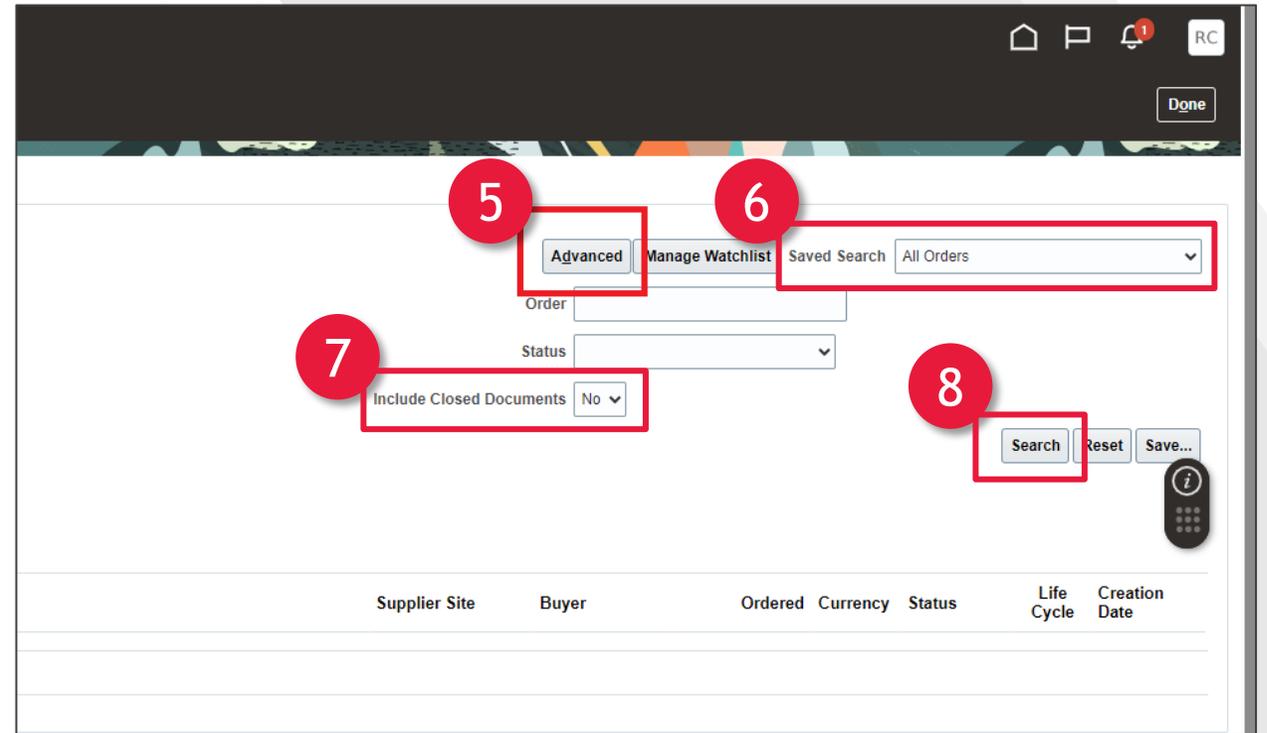
From the Supplier Portal:

1. Select **Manage Orders**
2. Select the **Entity** in the **Sold-to Legal Entity** dropdown
3. Select the **Business Unit** in the **Bill-to BU** dropdown
4. Select other fields as necessary



# Manage Orders Cont.

5. **Advanced Search** allows for more specific search criteria
6. **Saved Search** allows you to filter searches based on various saved searches
7. **Include Closed Documents** allows you to include or exclude closed orders
8. **Select Search**
9. Based on search fields completed, results will populate under **Search Results**



# Manage Orders Cont.

Add Columns to the Search Results:

1. Select View
2. Select Columns
3. Select Columns to add

To review Order Information in the Search Results:

4. Select Order Link

Manage Orders

Headers Schedules

Search

Sold-to Legal Entity

Bill-to BU

Supplier Site

1

2

3

View

Columns

Freeze

Detach

Sort

Reorder Columns...

Query By Example

Description

Show All

- Note to Supplier
- Reference Number
- Source Agreement
- Required Acknowledgment
- Procurement Card
- Document Style
- Pay on Receipt
- Freight Terms
- FOB
- Shipping Method
- Change Order Status
- Revision
- Revision Date
- Frozen
- Confirming Order
- Closed Date
- Bill-to Location
- Payment Terms

Manage Orders

Headers Schedules

Search

Search Results

4

Order

Order Date

Description

P001000052	4/25/24	Airline tickets
P001000022	4/22/24	Test Req for supplier SCM_SUP_VS_01

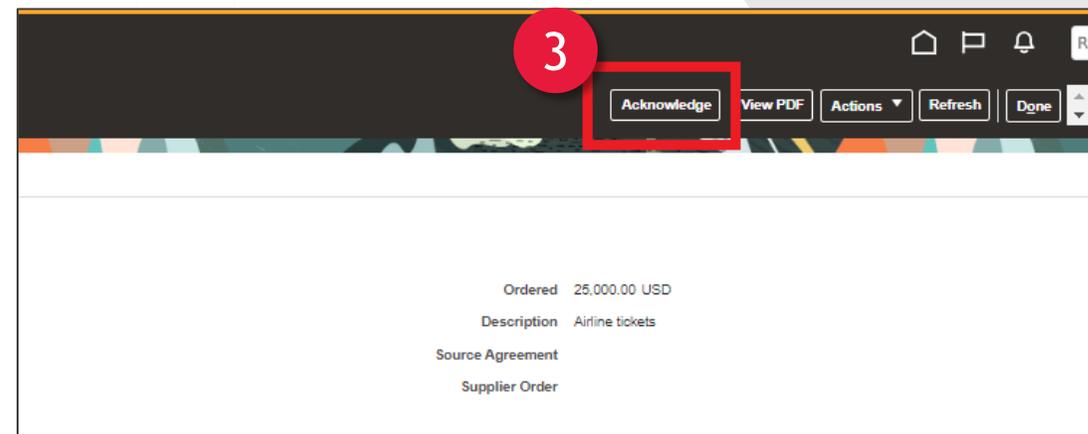
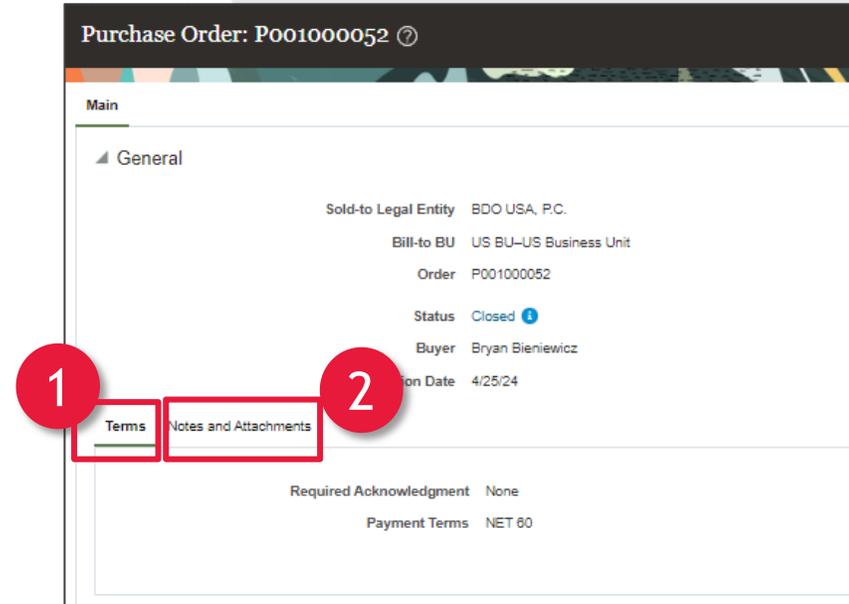
Columns Hidden: 26



# Manage Orders - Order Link

Details Available on the Order:

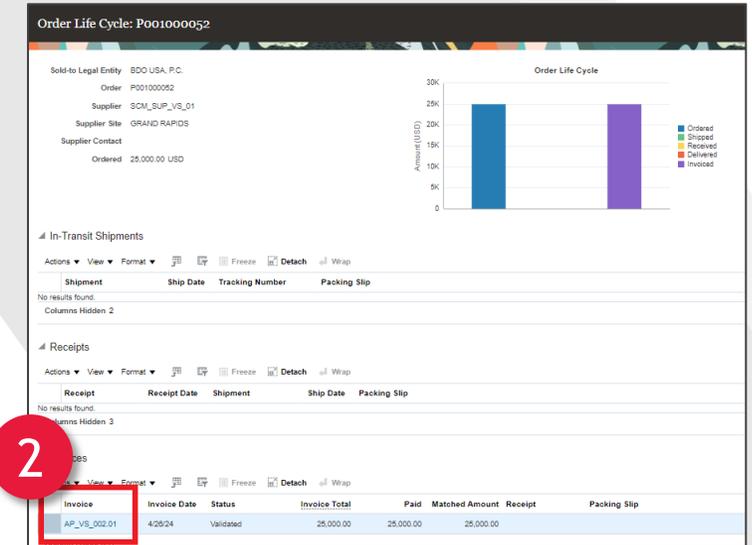
1. Terms
2. Notes and Attachments
3. Acknowledge



# Manage Orders - Life Cycle

1. Select the **Life Cycle** link to view the invoices
2. Select the **Invoice Number** link for payment details
3. Select **Payment**

Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
GRAND RAPIDS	Bieniewicz, Bryan	25,000.00	USD	Closed		4/25/24
GRAND RAPIDS	Williams, Macke...	5,000.00	USD	Closed		4/22/24



Invoice: AP\_VS\_002.01

Business Unit: US BU--US Business Unit  
Legal Entity Name: BDO USA, P.C.  
Supplier or Party: SCM\_SUP\_VS\_01  
Supplier Site: 01ACH  
Address: 5300 PATTERSON AVE, Grand Rapids, MI 49512, Kent  
Invoice Date: 4/25/24

Payments

Line	Amount	Description	Quantity	Unit Price	UOM Name	Purchase Order Number	Line	Schedule	Receipt Number	Line	Nur
1	25,000.00	Airline tickets	10	2,500	EA	P001000052	1	1			

Summary Tax Lines



# Invoice and Payments

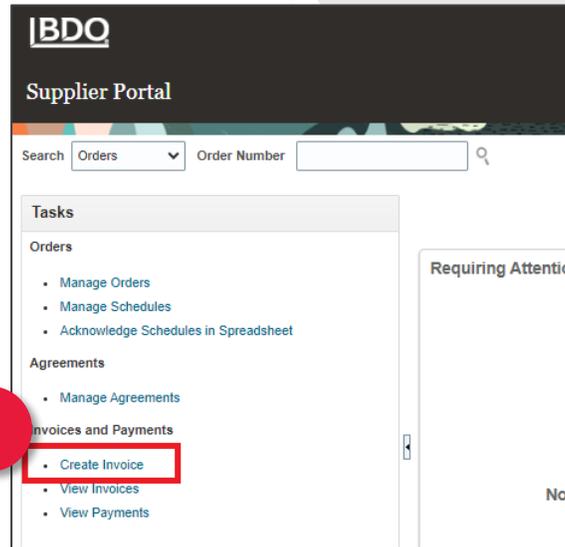
From the Supplier Portal:

1. Select **Create Invoice**
2. Enter or select **Identifying PO**

*Supplier, Taxpayer ID, Supplier Site, Address and Remit-to Bank Account will automatically populate*

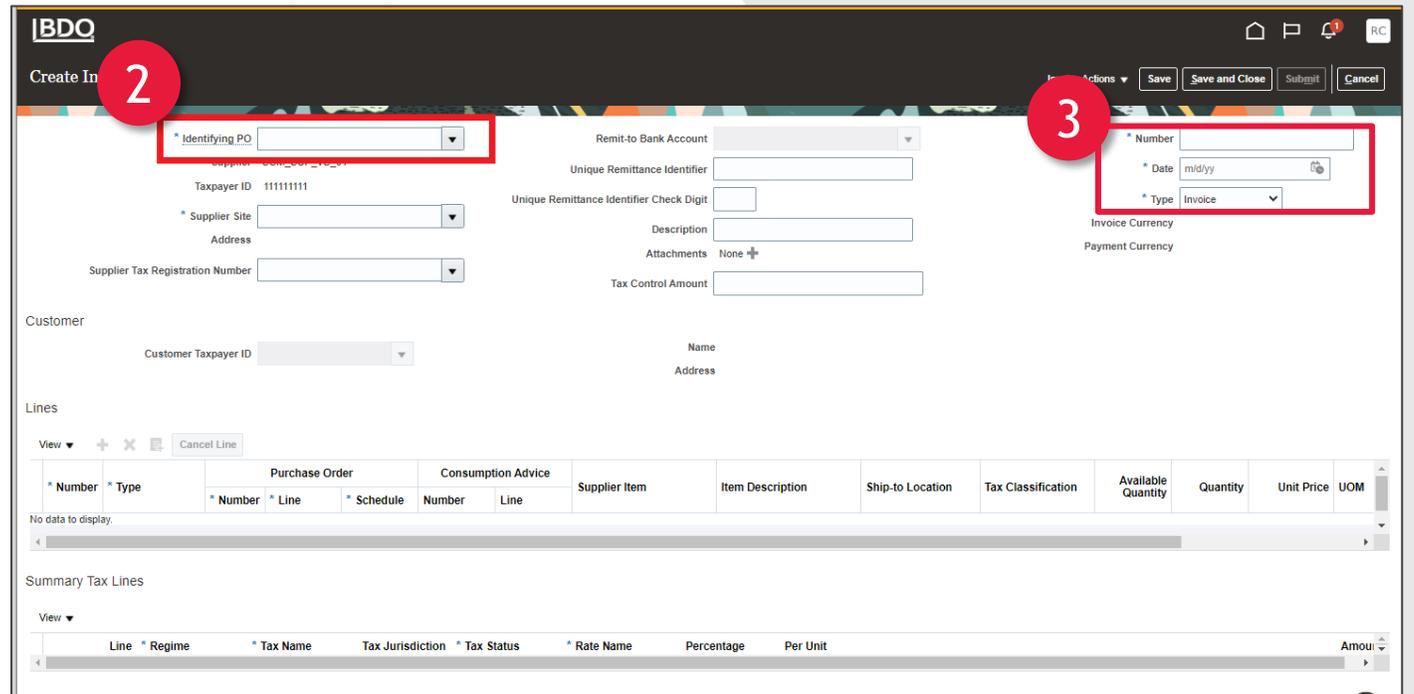
3. Enter **Number, Date and Type**

1



2

3



# Invoice and Payments Cont.

4. To add lines to the invoice, select 'Select and Add' symbol
5. Select the desired lines, then click Apply
6. To calculate tax, select Invoice Actions then Calculate Tax
7. Select Submit

**Create Invoice**

\* Identifying PO: [Dropdown]  
Supplier: SCM\_SUP\_VS\_01  
Taxpayer ID: 111111111  
\* Supplier Site: [Dropdown]  
Address: [Text Field]  
Supplier Tax Registration Number: [Dropdown]

Customer  
Customer Taxpayer ID: [Dropdown]

Lines

View [Dropdown] + [Icon] [Icon] [Icon] Cancel Line

* Number	* Type	Purchase Order			Consumption Advice	
		* Number	* Line	* Schedule	Number	Line
No data to display						

**Select and Add: Purchase Orders**

Search [Advanced] Saved Search [Dropdown] \*\* At least one is required

\*\* Purchase Order: P001000052  
\*\* Consumption Advice: [Text Field]  
\*\* Creation Date: m/d/yy h:mm a [Calendar Icon]

Search [Button] Reset [Button] Save... [Button]

Search Results

View [Dropdown] [Icon] [Icon] [Icon] Detach [Icon] Select All [Button]

Purchase Order		Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Order
Number	Line	Schedule	Number	Line			
No results found.							

Apply [Button] OK [Button] Cancel [Button]

**Create Invoice**

Invoice Actions [Dropdown] Save [Button] Save and Close [Button] Submit [Button] Cancel [Button]

Calculate Tax [Button] Ctrl+Alt+X  
Cancel Invoice [Button]  
Delete Invoice [Button]

\* Type: Invoice [Dropdown]  
Invoice Currency: USD - US Dollar  
Payment Currency: USD - US Dollar

**Create Invoice**

Invoice Actions [Dropdown] Save [Button] Save and Close [Button] Submit [Button] Cancel [Button]

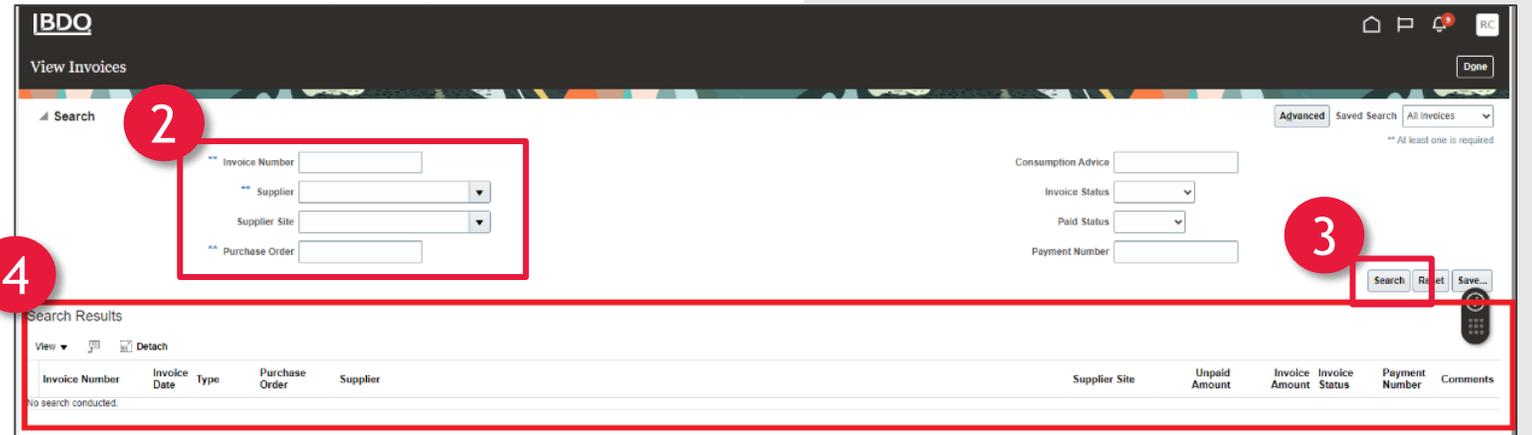
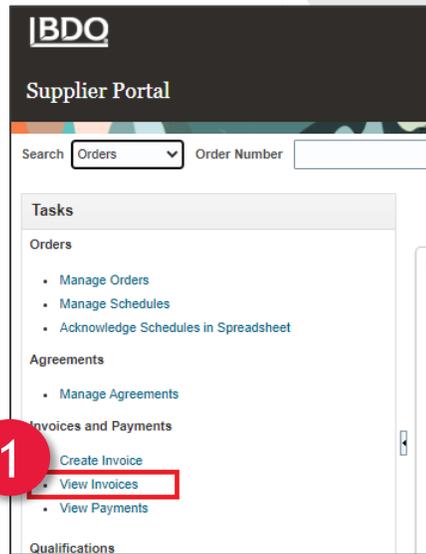
\* Number: TEST  
\* Date: 5/1/24 [Calendar Icon]  
\* Type: Invoice [Dropdown]  
Invoice Currency: USD - US Dollar  
Payment Currency: USD - US Dollar



# View Invoices

From the Supplier Portal:

1. Select **View Invoice**
2. Enter one of the search fields: **Invoice Number, Supplier or Purchase Order Number**
3. Select **Search**
4. Search results will display **Invoice Number, Invoice Date, Type, Purchase Order Number, Supplier Name, Supplier Site, Unpaid Amount, Invoice Amount, Invoice Status, payment Number and Comments**
5. Select **Invoice Number, Purchase Order or Payment Number** link to view more details



The screenshot shows the search results table. The first row of data is highlighted with a red box. Within this row, the 'Invoice Number' and 'Purchase Order' cells are highlighted with red boxes and red circles containing the number '5'.

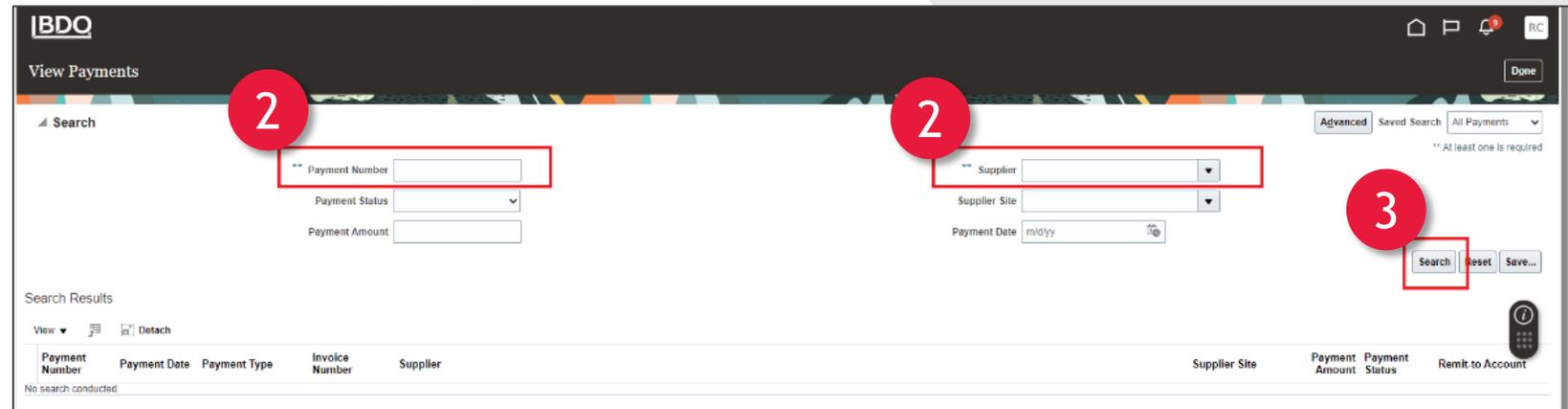
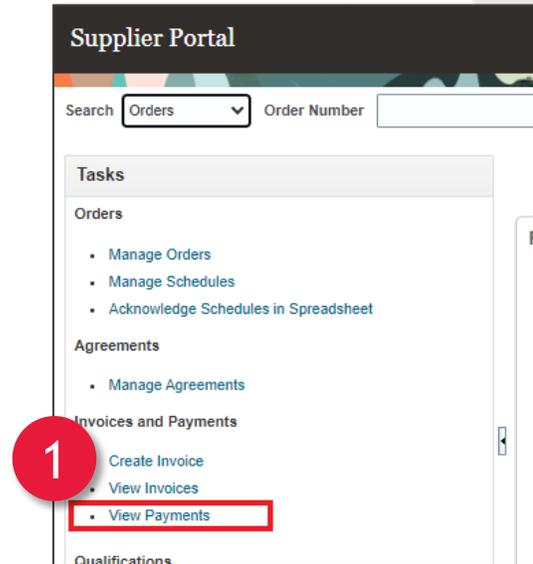
Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number	Comments
AP_VS_002.01	4/26/24	Standard	P001000052	SCM_SUP_VS_01	01ACH	0.00 USD	25,000.00 USD	Approved	5	



# View Payments

From the Supplier Portal:

1. Select **View Payments**
2. Enter **Payment Number** or **Supplier**
3. Select **Search**



# View Payments

Search results will display:

- Payment Number, Payment Date, Payment Type
  - Invoice Number
  - Supplier Name, Supplier Site
  - Payment Amount, Payment Status
  - Remit-to-Account Number
1. Select Payment Number or Invoice Number link to view more details

**BDO** View Payments

Search filters: Payment Number, Payment Status, Payment Amount, Supplier (SCM\_SUP\_VS\_01), Supplier Site, Payment Date (m/d/yy).

Search Results

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
5	4/26/24	Payment Process Re...	AP_VS_002.01	SCM_SUP_VS_01	01ACH	25,000.00 USD	Negotiable	11

**BDO** View Payments

Search filters: Payment Number, Payment Status, Payment Amount, Supplier (SCM\_SUP\_VS\_01), Supplier Site, Payment Date (m/d/yy).

Search Results

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
5	4/26/24	Payment Process Re...	AP_VS_002.01	SCM_SUP_VS_01	01ACH	25,000.00 USD	Negotiable	11

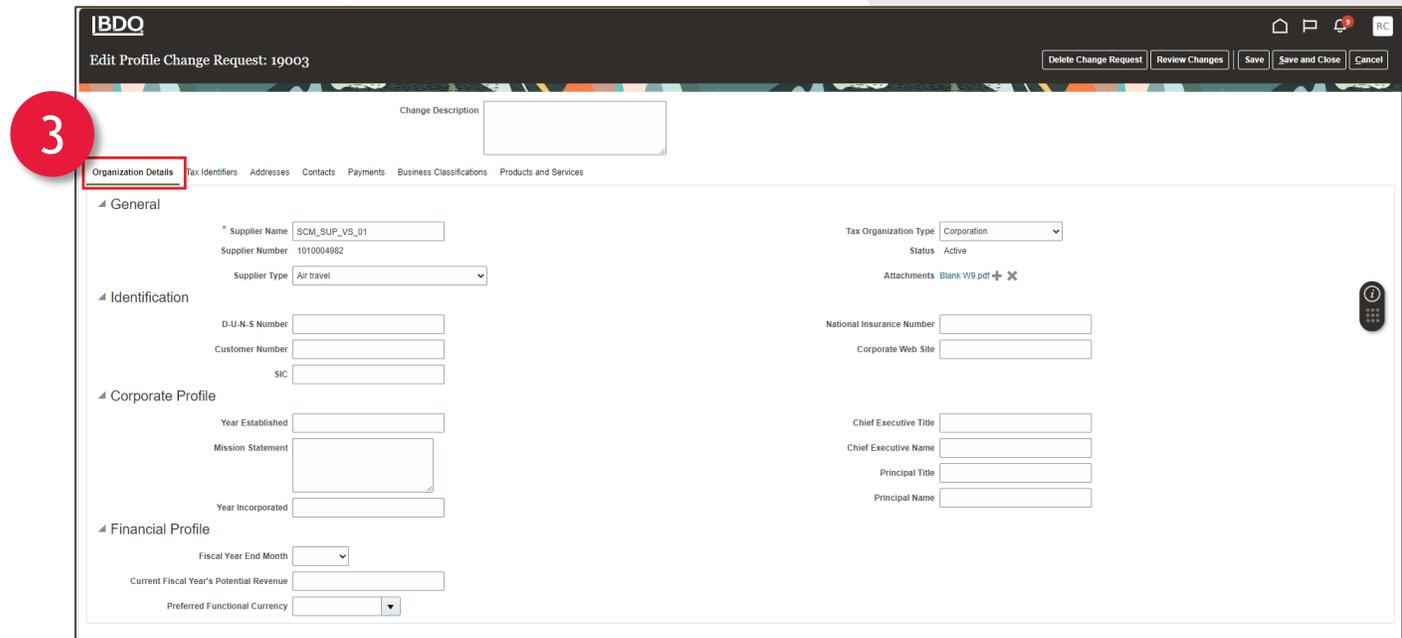
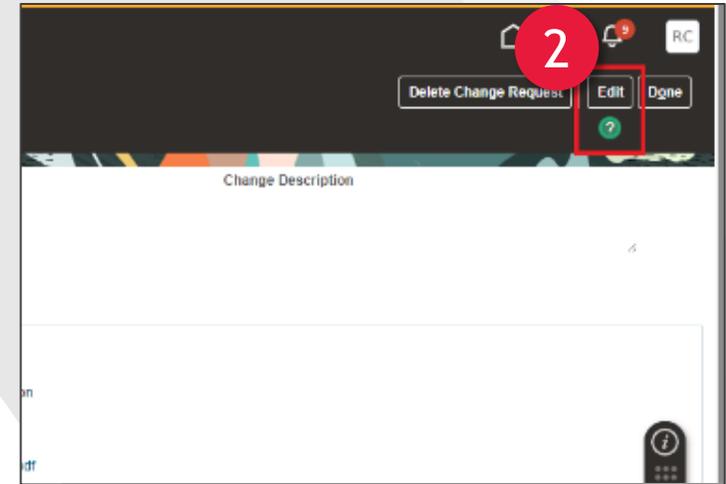
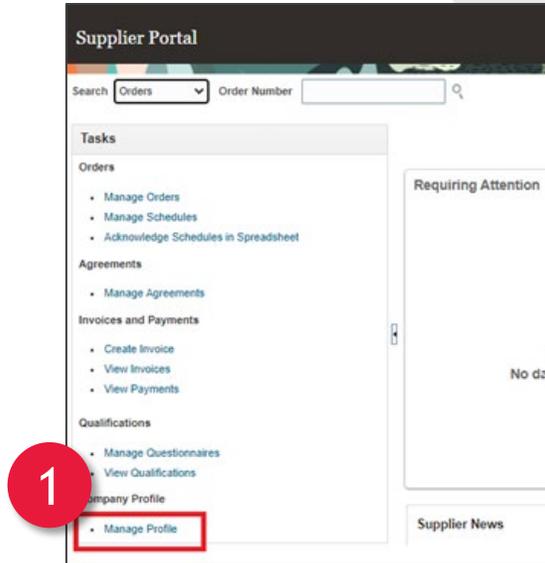


# Manage Profile

From the Supplier Portal:

1. Select **Manage Profile**
2. Select **Edit** to make any changes
3. Edit **Organization Details**

*A change to the Supplier Name field will require an updated W9 under Attachments*



# Manage Profile - Tax Identifiers

## 1. Select Tax Identifiers

*Any changes made to these fields requires an updated W9 to be attached on the Organization Details tab*

*If your Taxpayer ID number has changed this will require a new supplier profile to be completed*

**BDO**  
Edit Profile Change Request: 19003 Delete Change Request

Change Description

Organization Details **Tax Identifiers** Addresses Contacts Payments Business Classifications Products and Services

**Income Tax**

Taxpayer Country

Taxpayer ID

Federal reportable

\* Federal Income Tax Type

State reportable

Tax Reporting Name

Name Control

Verification Date

Use withholding tax

Withholding Tax Group

**Transaction Tax**

Tax Country

Tax Registration Number

Tax Registration Type



# Manage Profile - Addresses

1. Select **Addresses** to **Add, Edit** or **Inactivate** an address
2. To Edit select the **Pencil icon**
3. To add an address, select the **+ icon**

The screenshot shows the BDO 'Edit Profile Change Request: 19003' interface. At the top, there is a 'Change Description' text area. Below it is a navigation bar with tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Service'. The 'Addresses' tab is selected and highlighted with a red box and a red circle containing the number '1'. Below the navigation bar is a toolbar with 'Actions', 'View', and 'Format' dropdown menus, followed by a red box containing a red circle with the number '3' over a '+' icon, a red box containing a red circle with the number '2' over a pencil icon, and a 'Status' dropdown menu set to 'Active'. Below the toolbar is a table with a header row containing 'Address Name' and 'Address'.



# Manage Profile - Addresses Cont.

To add an address:

4. When entering the **Address Name** use the name of the city which you are located. Ensure to use all uppercase letters. (e.g., DETROIT)
5. Complete all address required fields
6. Enter the **Address Purpose**

This screenshot shows the 'Create Address' form with a red box around the 'Address Name' field, which is highlighted with a red circle containing the number 4. The 'Country' dropdown is set to 'United States'. The 'Address Line 1' and 'Address Line 2' fields are empty.

This screenshot shows the 'Create Address' form with multiple red boxes and a red circle containing the number 6. The 'Address Name' field is empty. The 'Country' dropdown is set to 'United States'. The 'Address Line 1' and 'Address Line 2' fields are empty. The 'City', 'State', and 'Postal Code' dropdowns are empty. The 'County' dropdown is empty. The 'Address Purpose' section has three checkboxes: 'Ordering', 'Remit to', and 'RFQ or Bidding', all of which are unchecked. The 'Phone' and 'Fax' fields are empty. The 'Email' field is empty. The 'Inactive Date' field is set to 'm/d/yy'. The 'Status' is set to 'Active'. The 'Create Another', 'OK', and 'Cancel' buttons are visible at the bottom right.



# Manage Profile - Inactivate Addresses

To inactivate an address:

1. Select the address you want inactive
2. Enter the date you want the address to become inactive
3. Press **OK**

The screenshot shows a 'Create Address' dialog box with the following fields and options:

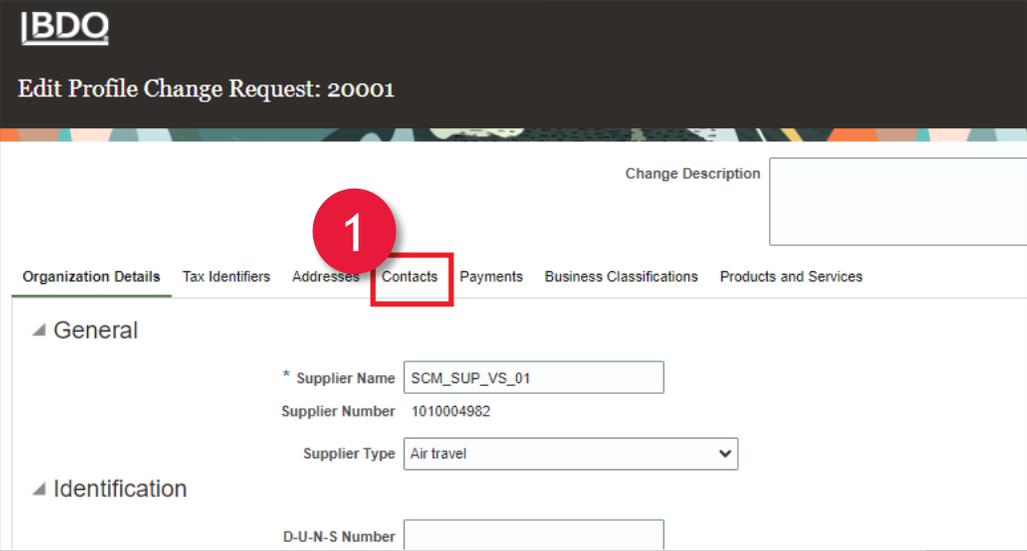
- \* Address Name: [Text Input]
- \* Country: [Dropdown: United States]
- \* Address Line 1: [Text Input]
- Address Line 2: [Text Input]
- \* City: [Dropdown]
- \* State: [Dropdown]
- \* Postal Code: [Dropdown]
- Postal Code Extension: [Text Input]
- \* County: [Dropdown]
- Language: [Dropdown]
- \* Address:  Ordering
- Purpose:  Remit to,  RFQ or Bidding
- Phone: [Dropdown: 1] [Text Input]
- Fax: [Dropdown: 1] [Text Input]
- Email: [Text Input]
- Inactive Date: [Text Input: m/d/yy] (highlighted in red)
- Status: Active

Buttons at the bottom right: Create Another, OK, Cancel.



# Manage Profile - Contacts

1. Select **Contacts** to add, edit or inactivate a contact
2. Select the + symbol to add a contact



The screenshot shows the BDO web interface for "Edit Profile Change Request: 20001". The "Contacts" tab is highlighted with a red box and a red circle containing the number "1". The interface includes a "Change Description" field, a navigation menu with tabs for "Organization Details", "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services", and a form with sections for "General" and "Identification".

**BDO**  
Edit Profile Change Request: 20001

Change Description

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

General

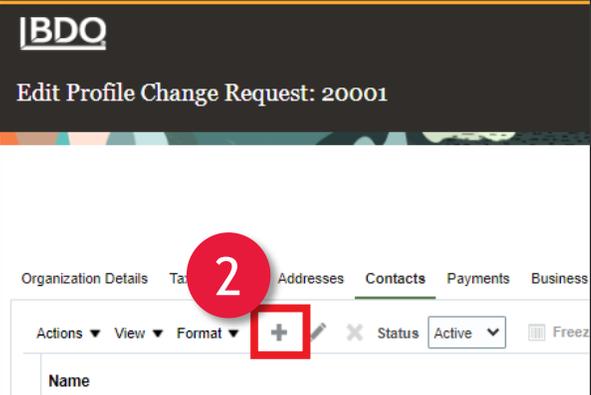
\* Supplier Name SCM\_SUP\_VS\_01

Supplier Number 1010004982

Supplier Type Air travel

Identification

D-U-N-S Number



The screenshot shows the BDO web interface for "Edit Profile Change Request: 20001". The "Contacts" tab is highlighted with a red box and a red circle containing the number "2". Below the navigation menu, there is a table with a plus sign (+) in a red box, indicating the option to add a new contact. The table has columns for "Name", "Status", and "Freeze".

**BDO**  
Edit Profile Change Request: 20001

Organization Details Tax Identifiers Addresses **Contacts** Payments Business

Actions View Format **+** Status Active Freeze

Name



# Manage Profile - Add Contacts

1. Enter the Name, Job Title, Phone Number, Email and Administrative Contact box if applicable
2. Enter User Account role if applicable
3. Select OK

The screenshot shows the 'Create Contact' dialog box with several red annotations. A red circle with the number '1' is placed over the 'Salutation' dropdown and the 'First Name', 'Middle Name', 'Last Name', and 'Job Title' text boxes. A red box highlights the 'Phone', 'Mobile', and 'Fax' fields, the 'Email' field, and the 'Administrative contact' checkbox. A red circle with the number '2' is placed over the 'User Account' section, which includes the 'Request user account' checkbox, the 'Roles' and 'Data Access' tabs, and a table with columns 'Role' and 'Description'. A red circle with the number '3' is placed over the 'OK' button at the bottom right of the dialog box.

**Create Contact**

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status Active

Contact Addresses

Address Name Address Phone Address Purpose Status

No data to display.

Columns Hidden 5

User Account

Request user account

Roles Data Access

Role Description

Create Another OK Cancel



# Manage Profile - Edit Contacts

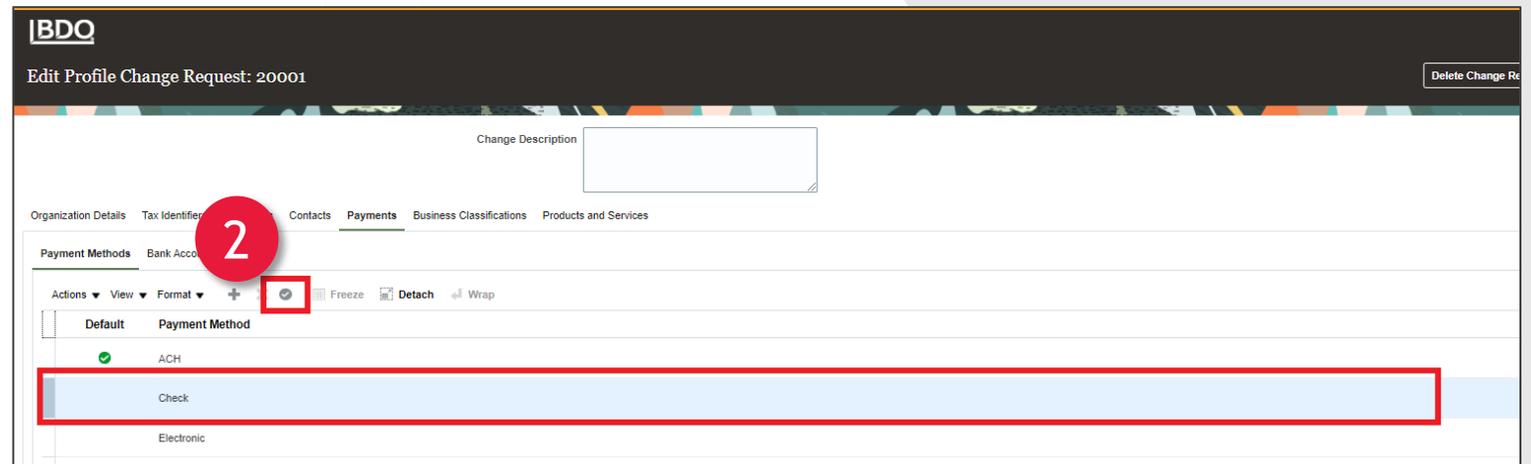
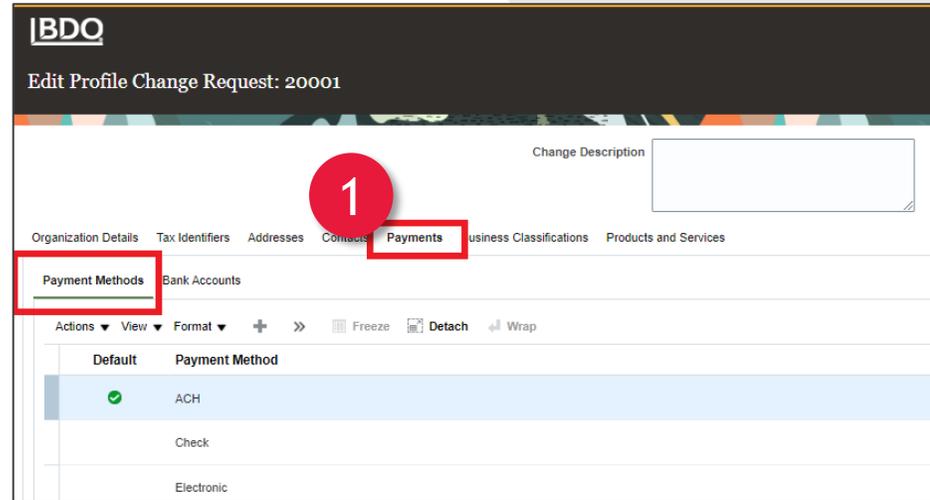
1. Select the **Contact** then select the **Pencil** icon
2. Edit Contact window will appear. Changes to all fields can be made
3. Update the **Account Status** and view the username

The screenshot displays the 'Edit Profile Change Request: 20001' interface. At the top, there is a 'Change Description' text area. Below it, a navigation bar includes tabs for 'Organization Details', 'Tax', 'Assets', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Contacts' tab is active, and a red circle with the number '1' highlights the pencil icon in the 'Actions' menu. Below the navigation bar, a table lists contact information with columns for 'Name', 'Job Title', and 'Email'. A red box highlights the row for 'NEW USER, TEST' with email 'Test@bdo.com'. Below this is a form for editing the contact, with fields for 'Salutation', 'First Name' (TEST), 'Middle Name', 'Last Name' (NEW USER), 'Job Title', 'Phone', 'Mobile', 'Fax', 'Email' (Test@bdo.com), and 'Status' (Active). A red circle with the number '2' highlights the 'Account Status' dropdown menu, which is currently set to 'Active'. Below the form is a table for 'Contact Addresses' with columns for 'Address Name', 'Address', 'Phone', 'Address Purpose', and 'Status'. Below that is a 'User Account' section with a red box around the 'User Name' field (971920) and a red circle with the number '3' next to it. At the bottom, there is a 'Roles' section with a table listing roles and their descriptions. A red box is also present in the bottom right corner of the slide.



# Manage Profile - Payments

1. Select **Payments** to manage your method of payment and update banking information
2. To change the payment method, select the **New Payment Method** then select **Set default icon**



# Manage Profile - Payments

To update the bank account, the old bank account must be inactivated

1. To inactive the bank account select the bank account and select the **Pencil** icon
2. Enter an inactive date in the **Inactivate On** field
3. Select **OK**

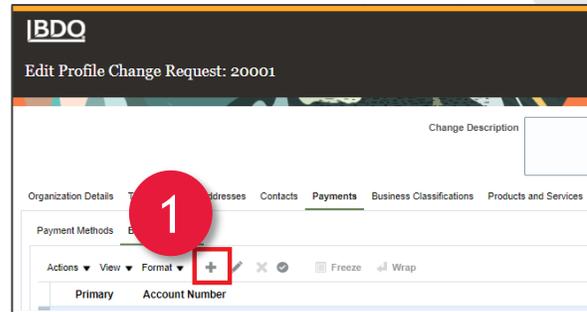
The screenshot shows the BDO 'Edit Profile Change Request' interface. At the top, there's a 'Change Description' field. Below it are navigation tabs: Organization Details, Tax Ids, Payments (selected), Business Classifications, and Products and Services. Under the 'Payments' tab, there's a table with columns 'Primary', 'Account Number', and 'IBAN'. A row with account number '11' is highlighted, and a red box around the pencil icon in the 'Actions' column is labeled with a red circle '1'.

The screenshot shows the 'Edit Bank Account 11' form. It includes fields for Country (United States), Account Number (TEST), Bank Name (US BANK NA), and Bank Branch (TEST). There's an 'Inactivate On' field with a date picker set to 4/17/24, highlighted with a red box and a red circle '2'. Below these are 'Additional Information' fields for Account Name, Alternate Account Name, Account Suffix, Check Digits, Account Type, and Description. At the bottom right, the 'OK' button is highlighted with a red box and a red circle '3'.



# Manage Profile - Payments

1. To add a Bank Account, select the + symbol
2. For Domestic ACH or Wire Payments complete the **Country, Account Number Bank Name and Bank Branch Fields**
3. For Foreign Wires complete **Country, Account Number, Bank Name, Bank Branch** fields, **IBAN** if applicable and check the **Allow International Payments** box



**Create Bank Account**

Enter account number or IBAN unless account number is marked as required.

\* Country

Account Number

Bank Name

Bank Branch

Allow international payments

Additional Information

Account Name

Alternate Account Name

Account Suffix

Check Digits

Account Type

Description

Create Another OK Cancel



# Manage Profile - Business Classifications

1. Select **Business Classifications** to update all applicable business classification status
2. If no classifications apply select the **None of the classifications are applicable** box
3. To add a classification, select the **+** icon
4. Choose the **Classification** and the **Certifying Agency**

BDO  
Edit Profile Change Request: 20001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** Products and Services

None of the classifications are applicable

Actions View Format + X Freeze Detach Wrap

Classification	Subclassification	Status
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BDO  
Edit Profile Change Request: 20001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** Products and Services

None of the classifications are applicable

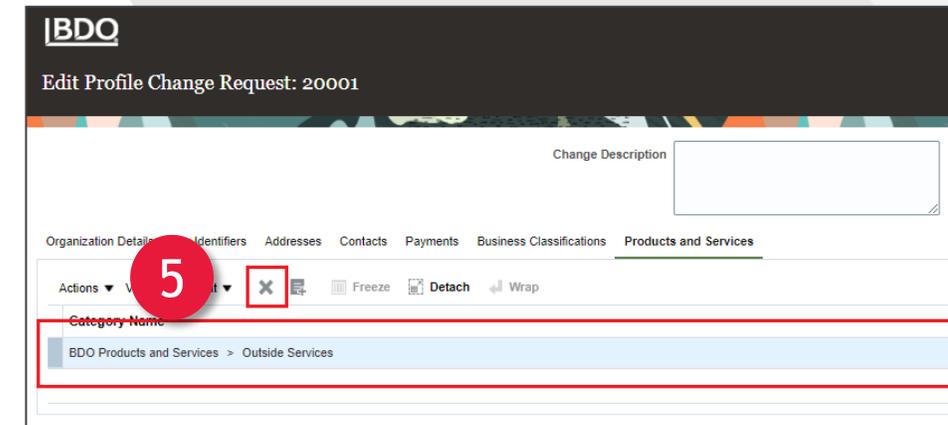
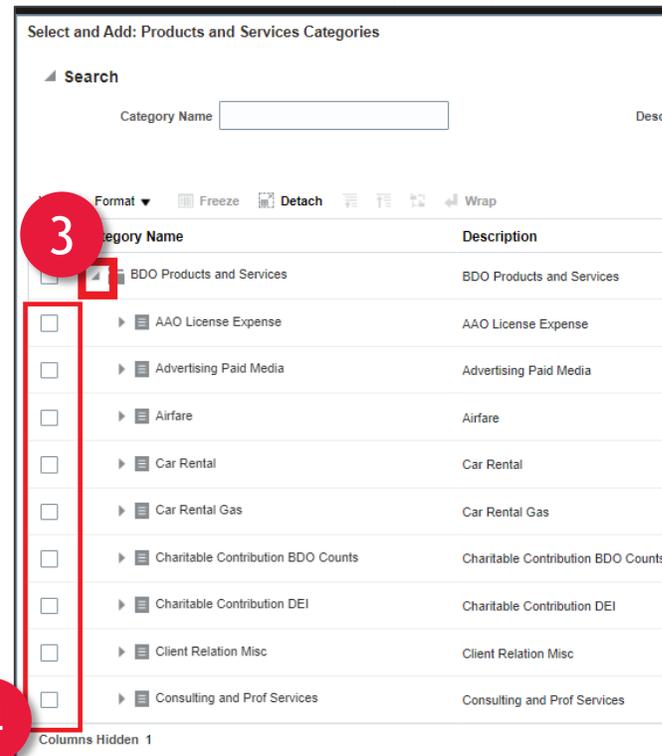
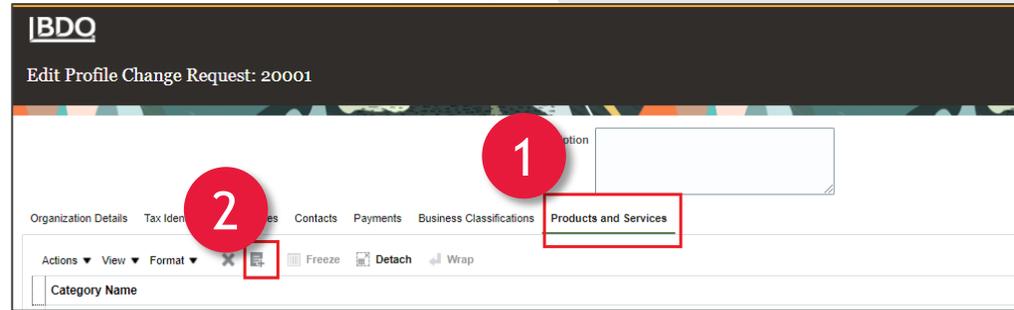
Actions View Format + X Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency



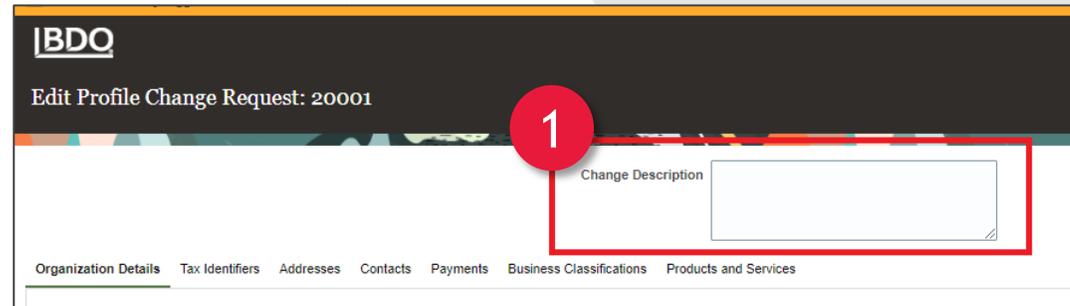
# Manage Profile - Products and Services

1. Select **Products and Services** to add or remove products or services
2. To add select the + icon
3. Select the **Arrow** to expand the categories
4. Select all applicable boxes
5. To delete an existing category, **highlight** the line and select the **X** icon



# Manage Profile - Notes

1. Input notes to the **Change Description Box** based on changes made to the profile for the approver to see



**BDO**  
Edit Profile Change Request: 20001

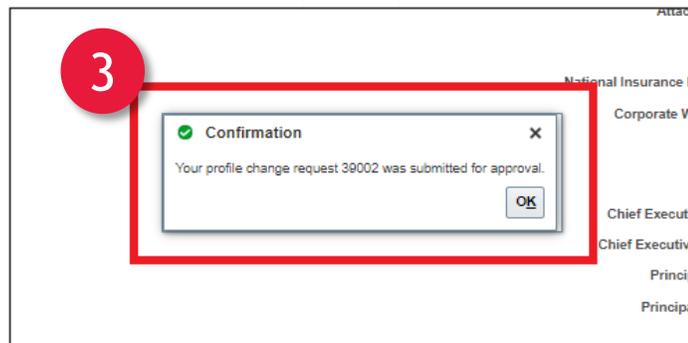
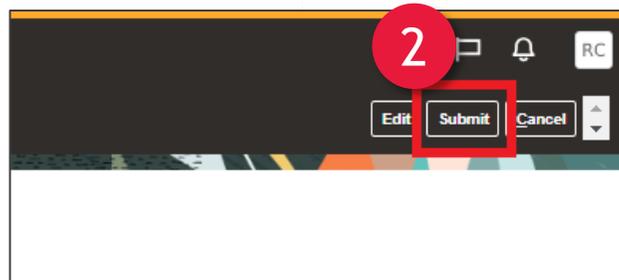
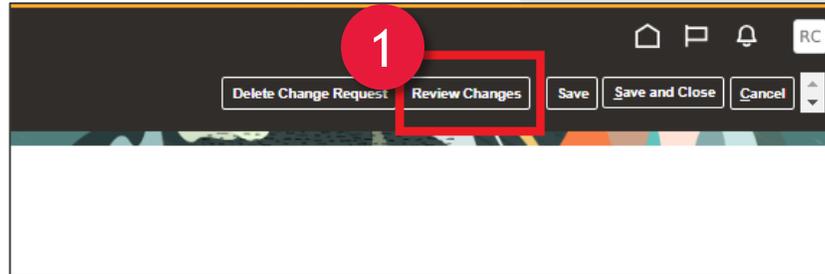
Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services



# Manage Profile - Review and Submit

1. To review all changes, select the **Review Changes** button
2. Select **Submit**
3. Select **OK** on the confirmation window



# Manage Profile - View Pending Change Requests

1. View pending change requests at the top of the **Manage Profile** page
2. Select the Change Request Number Link to see more information

The screenshot displays the BDO Company Profile interface. At the top, the BDO logo and 'Company Profile' are visible. A red box highlights the 'Last Change Request' section, which includes the request number '18001', the status 'Canceled', the requester 'Curley, Rachel', and the date '4/26/24'. A red circle with the number '1' is placed over this highlighted area. Below this, a navigation bar lists various tabs: Organization Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, and Products and Services. The main content area is divided into sections: General (Company: SCM\_SUP\_VS\_01, Supplier Number: 1010004982, Supplier Type: Air travel, Tax Organization Type: Corporation, Status: Active, Attachments: Blank W9.pdf), Identification (D-U-N-S Number, Customer Number, SIC, National Insurance Number, Corporate Web Site), and Corporate Profile (Year Established, Mission Statement, Chief Executive Title).



# Appendix





## About BDO USA

At BDO, our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes – for our people, our clients and our communities. Across the U.S., and in over 160 countries through our global organization, BDO professionals provide assurance, tax and advisory services for a diverse range of clients.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.C, a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

[www.bdo.com](http://www.bdo.com)

Material discussed is meant to provide general information and should not be acted on without professional advice tailored to your needs.

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