



## USER MANUAL

# Vendor Management

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## Document Revisions

Date	Version Number	Changes Added by	Document Changes
14/06/2024	1	Surabhi Dobhal	

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## INTRODUCTION

Please refer to the Enova D365 ERP Vendor Training Manual. This guide is designed to help you navigate the new D365 ERP system effectively. As our valued partner, your success is our priority, and we aim to make the transition to this new system as smooth as possible.

### Objectives of D365 Implementation

The implementation of the D365 ERP system aims to:

- **Enhance Transparency:** Providing clear visibility into processes and transactions.
- **Ensure Compliance:** Meeting all regulatory and internal compliance requirements.
- **Improve Efficiency:** Streamlining processes for quicker turnaround times.
- **Foster Better Communication:** Facilitating smoother interactions between vendors and Enova.

Our goal is to build a more collaborative and efficient environment that benefits both Enova and our suppliers.

The guide will cover the below comprehensive scenarios:

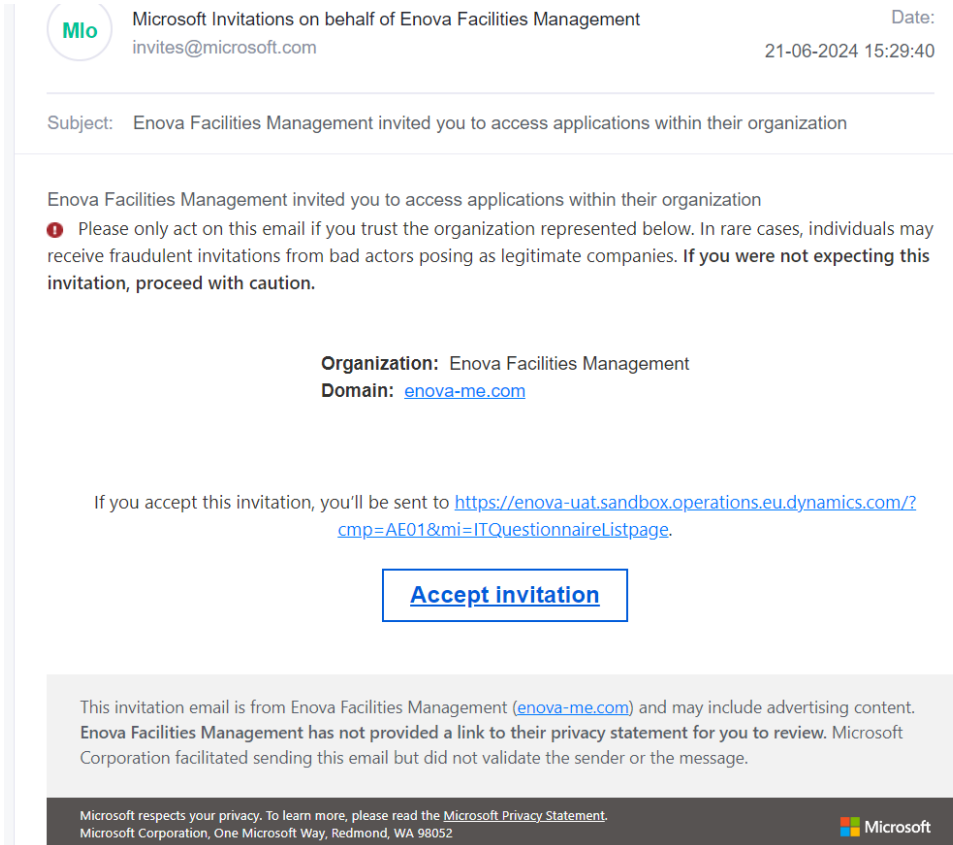
- a. Registering as a Supplier (If you are a prospective/New Vendor who has not registered with Enova earlier)
- b. Updating Your Profile as an Existing Supplier
- c. Get Invited to a Sourcing Tender and How to Submit Bids
- d. How to participate in Commercial Negotiation and provide Final Offer
- e. Asking Tender-Related Queries
- f. Periodically Updating Your Profile
- g. Frequently Asked Questions (FAQs)
- h. Contact Support

## 1 Vendor Registration

**Note:** Vendors already registered on our existing vendor portal (Ariba) will be registered by default in D365 Finance and Operations (D365 FO) and need not go through vendor registration again. For updates on your existing profile, please refer to sections **XXXX**.

## 1.1 Login to Dynamics 365 Enova ERP application

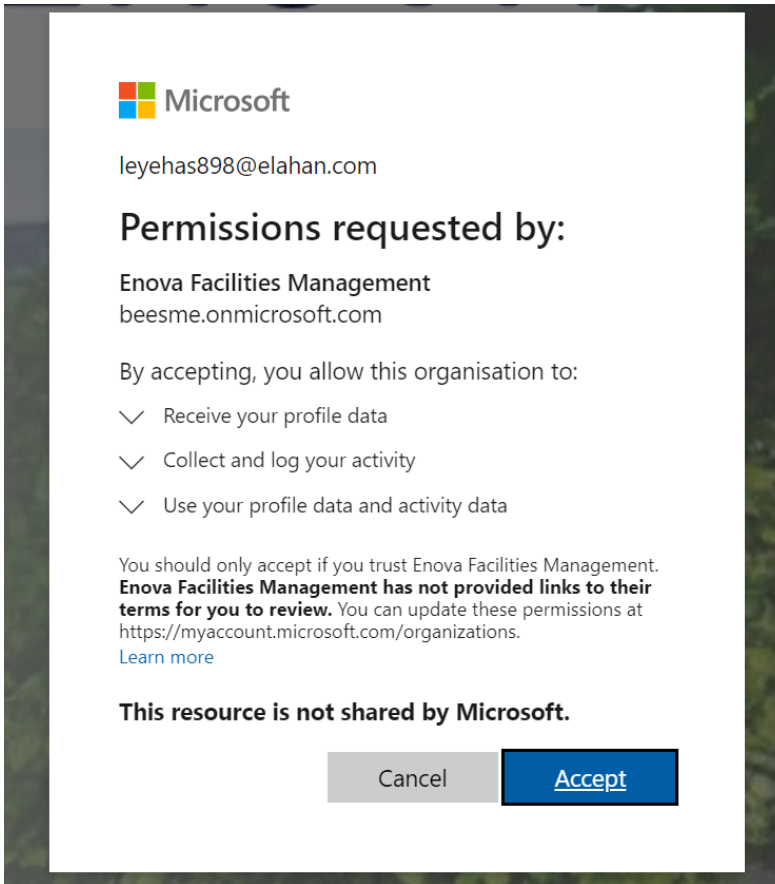
1. The vendor will receive an e-mail with an Invitation Link.



The screenshot shows an email interface. At the top left is a circular profile picture with the initials 'Mio'. To its right, the sender is identified as 'Microsoft Invitations on behalf of Enova Facilities Management' with the email address 'invites@microsoft.com'. The date and time are '21-06-2024 15:29:40'. Below this is the subject line: 'Subject: Enova Facilities Management invited you to access applications within their organization'. The main body of the email contains a warning: 'Enova Facilities Management invited you to access applications within their organization' followed by a red warning icon and text: 'Please only act on this email if you trust the organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.' Below this is the organization name 'Organization: Enova Facilities Management' and the domain 'Domain: [enova-me.com](https://enova-me.com)'. A link is provided: 'If you accept this invitation, you'll be sent to <https://enova-uat.sandbox.operations.eu.dynamics.com/?cmp=AE01&mi=ITQuestionnaireListpage>.' A blue button labeled 'Accept invitation' is centered below the link. At the bottom, a grey box contains a disclaimer: 'This invitation email is from Enova Facilities Management ([enova-me.com](https://enova-me.com)) and may include advertising content. Enova Facilities Management has not provided a link to their privacy statement for you to review. Microsoft Corporation facilitated sending this email but did not validate the sender or the message.' The footer of the email includes the Microsoft privacy statement and logo.

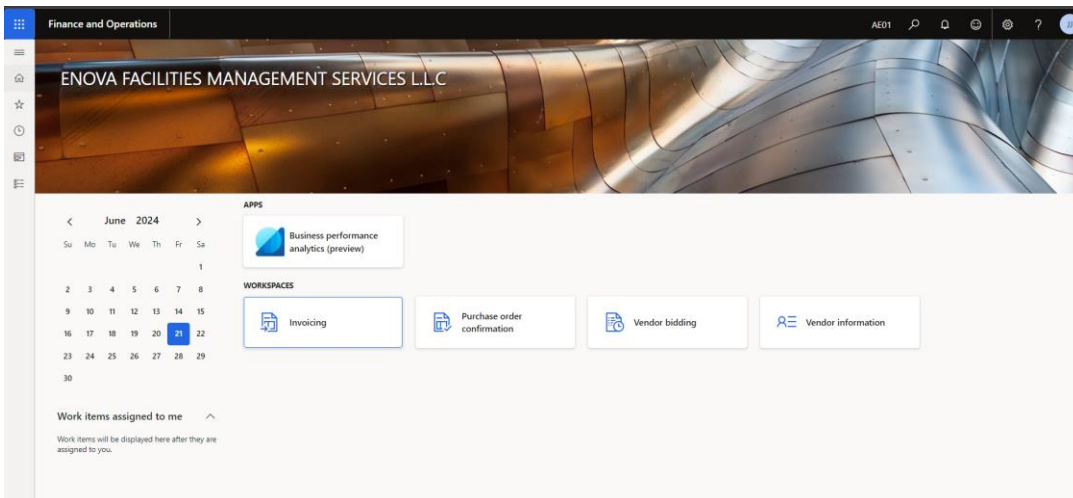
2. Click on Accept Invitation, then you will be directed to the Microsoft Login page
3. Login with your Email ID and password

4. Click Accept

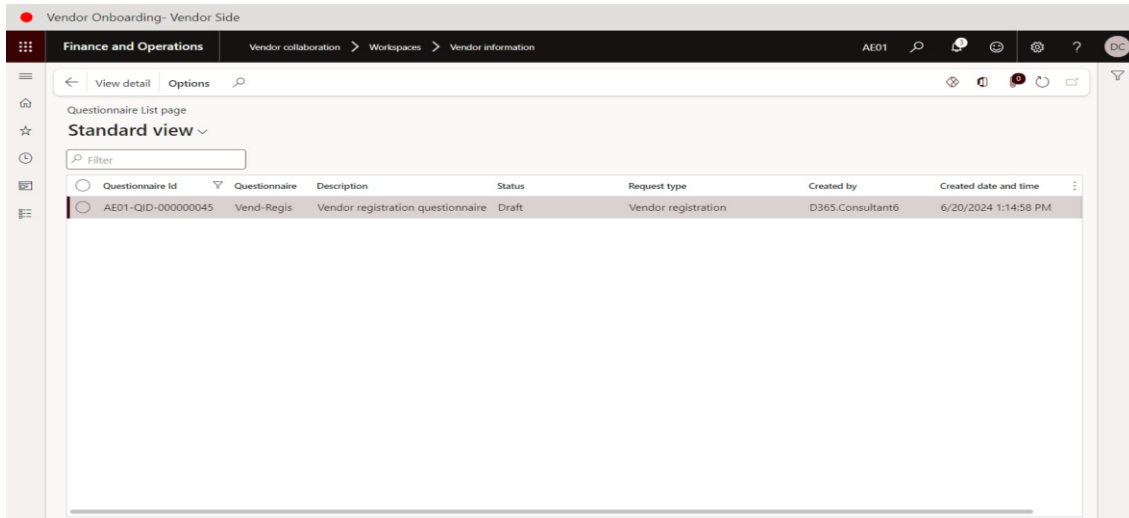


1.2 Questionnaire Setup

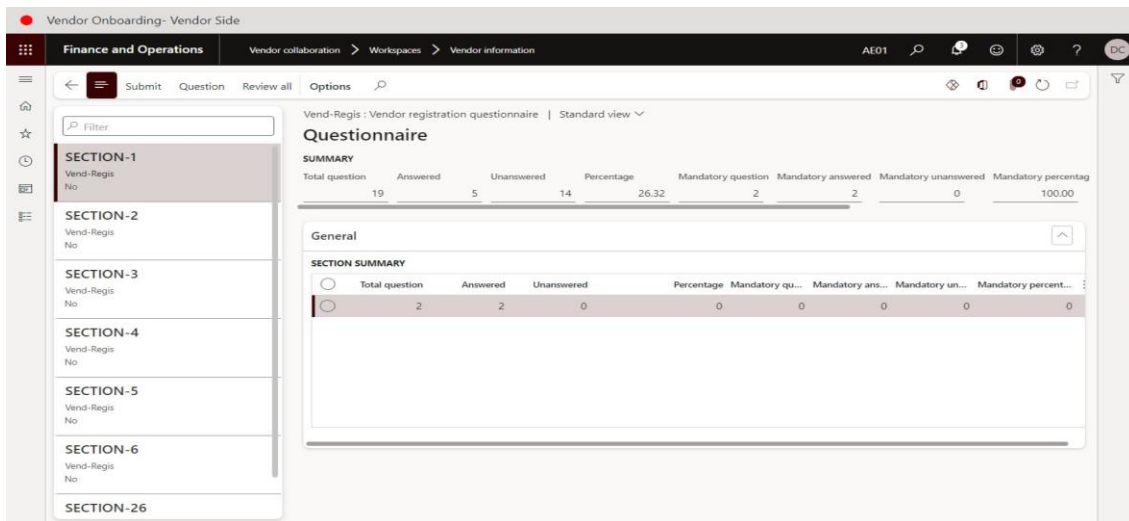
5. Go to **Vendor collaboration > Enova > Questionnaire**



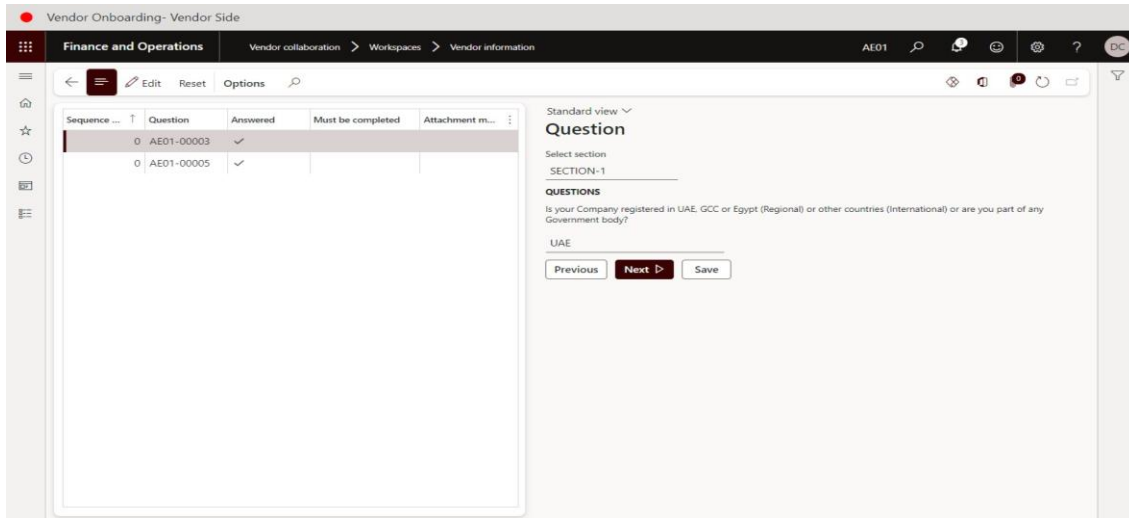
6. Click View detail.



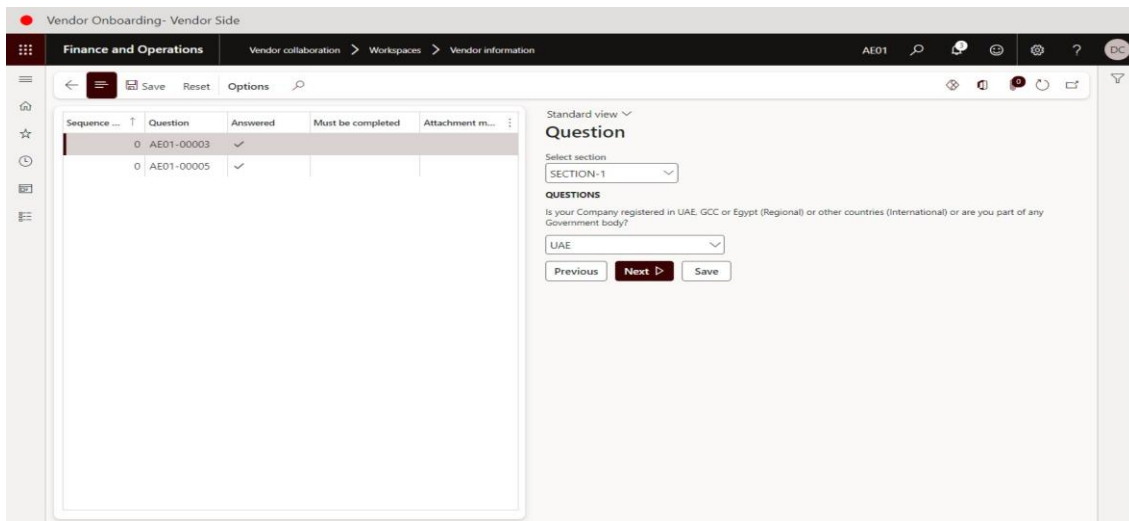
7. Click Question.



8. Use the shortcut for switching to View or Edit mode.

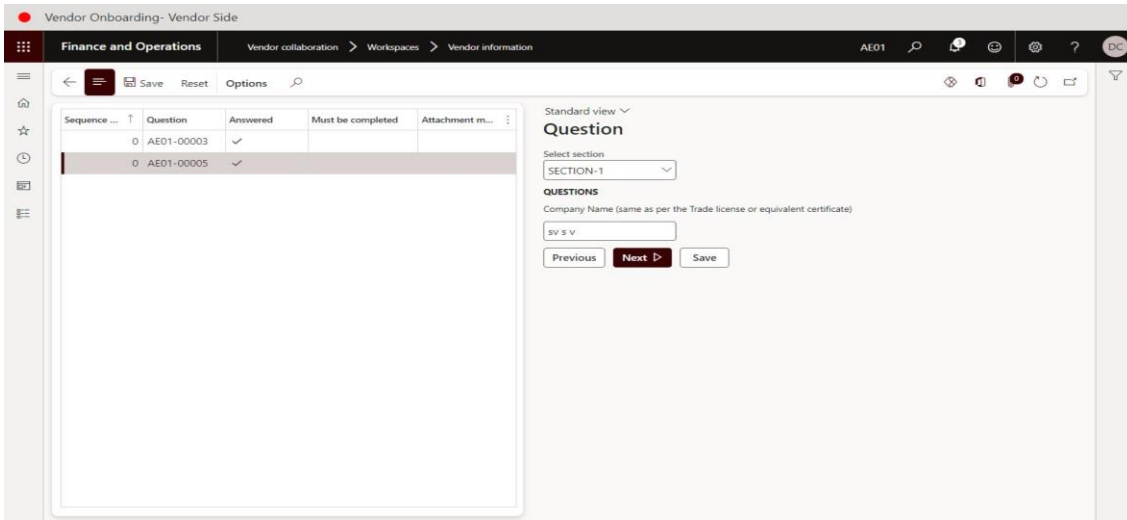


9. Click Next page records.

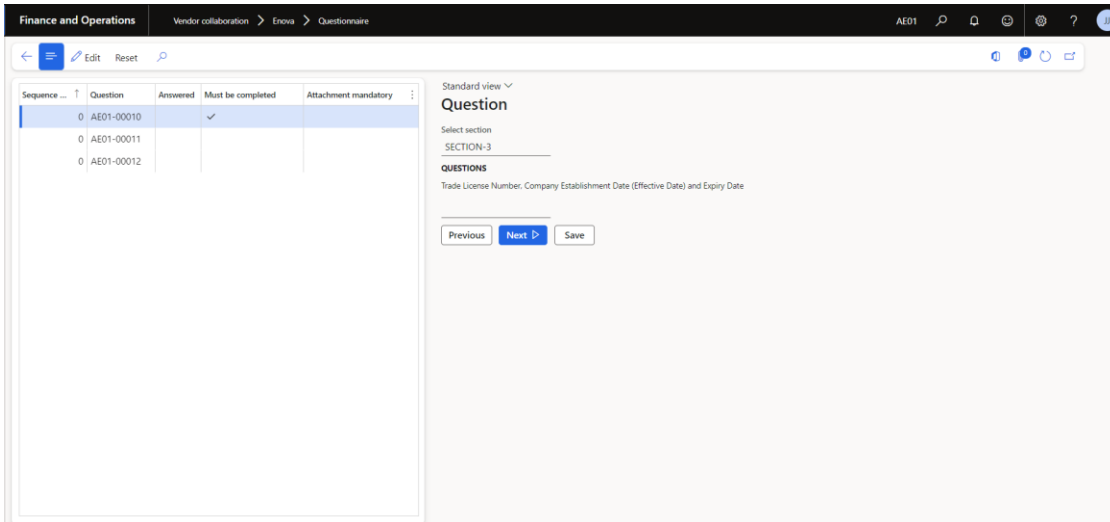




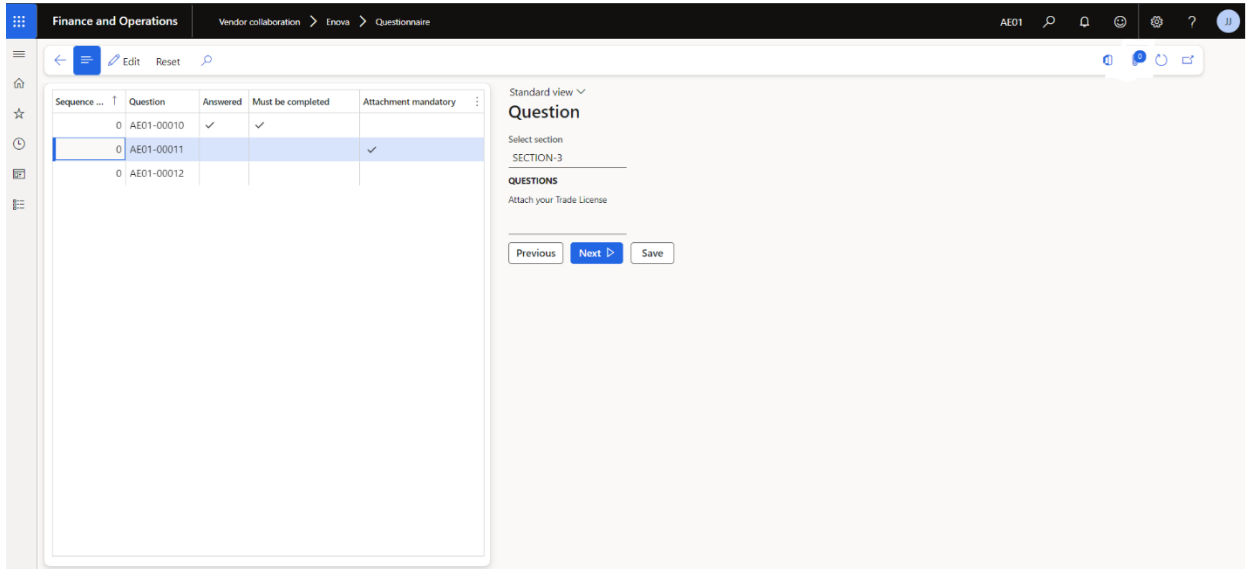
10. Click Save.



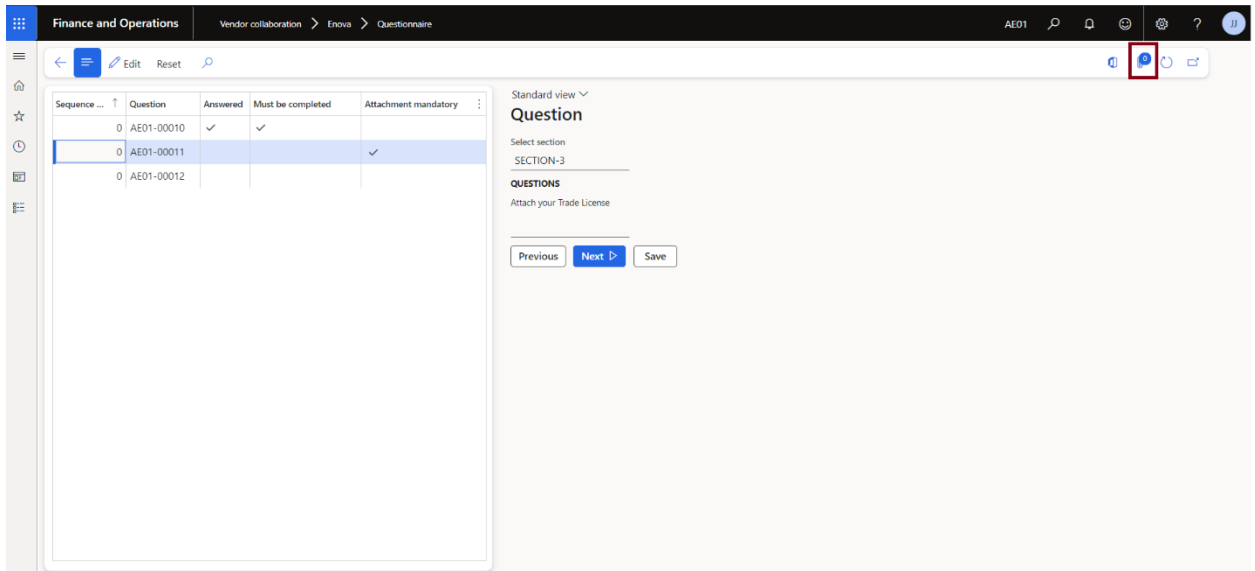
11. All the questions that have marked as “Must be completed” are Mandatory



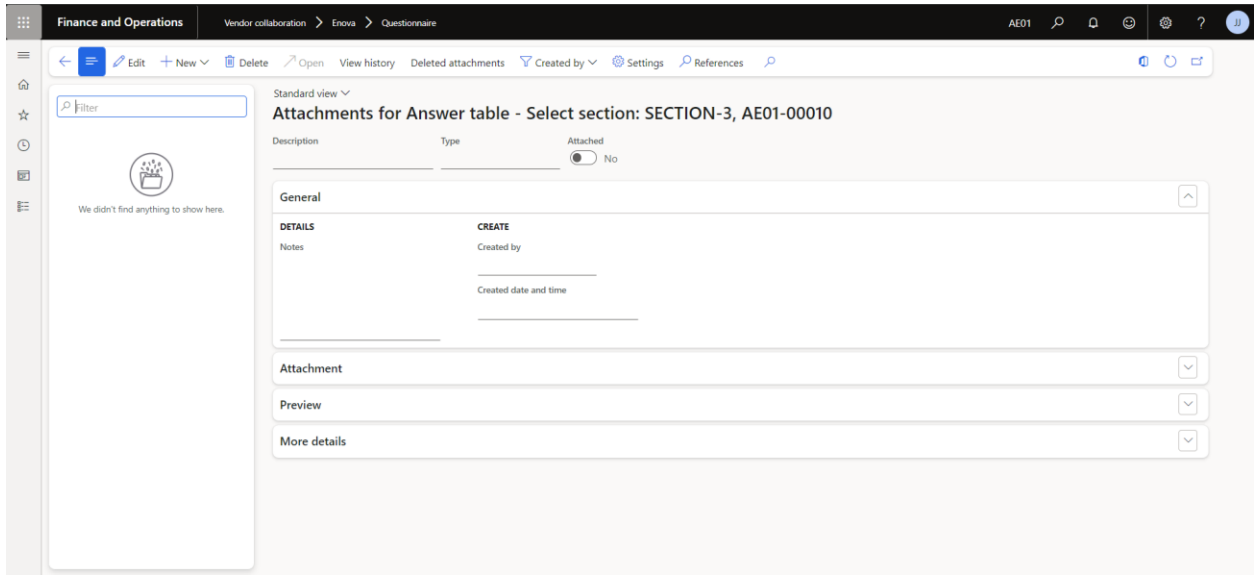
12. If there are any questions that have mark in “Attachment mandatory” column, An attachment is necessary for that question.



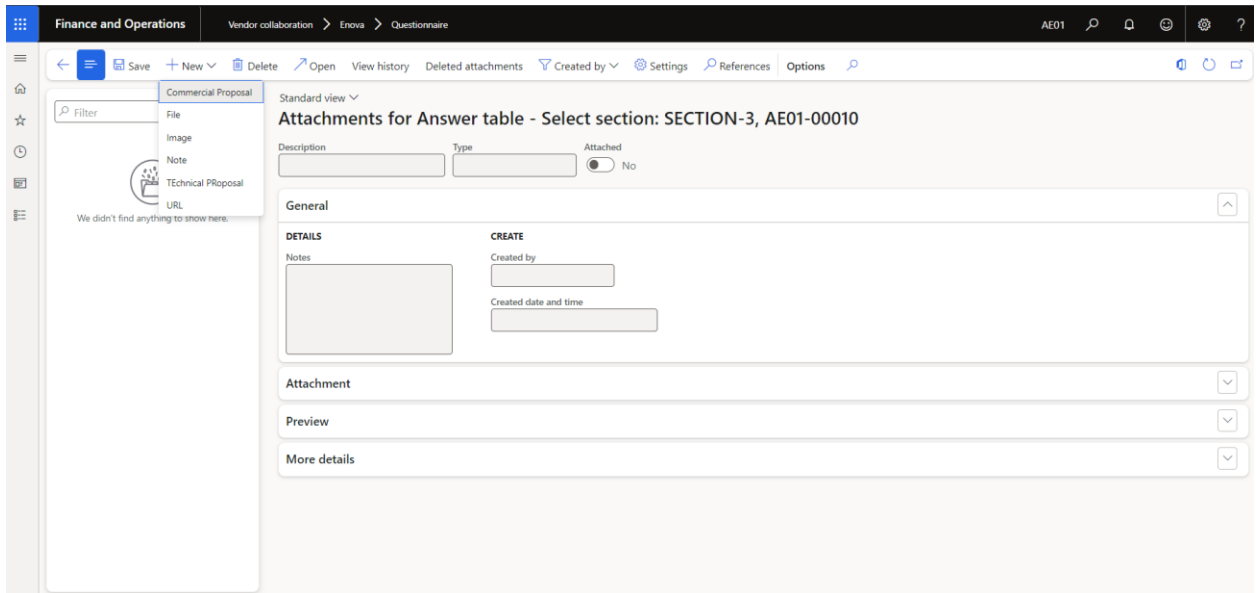
13. To attach a file Click on attachments



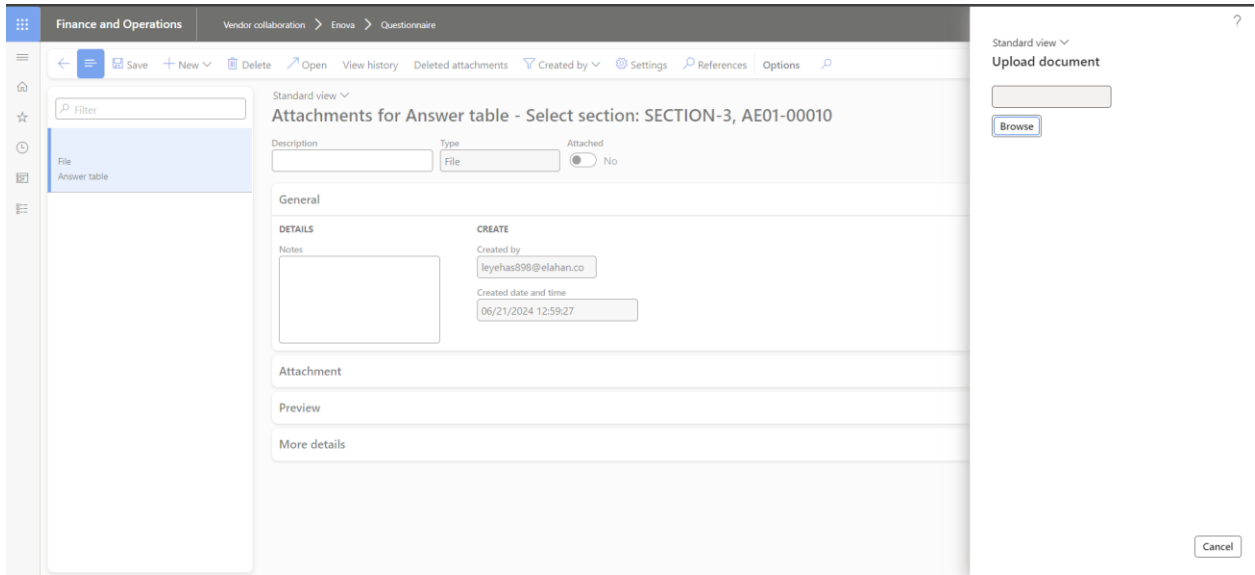
14. Click New



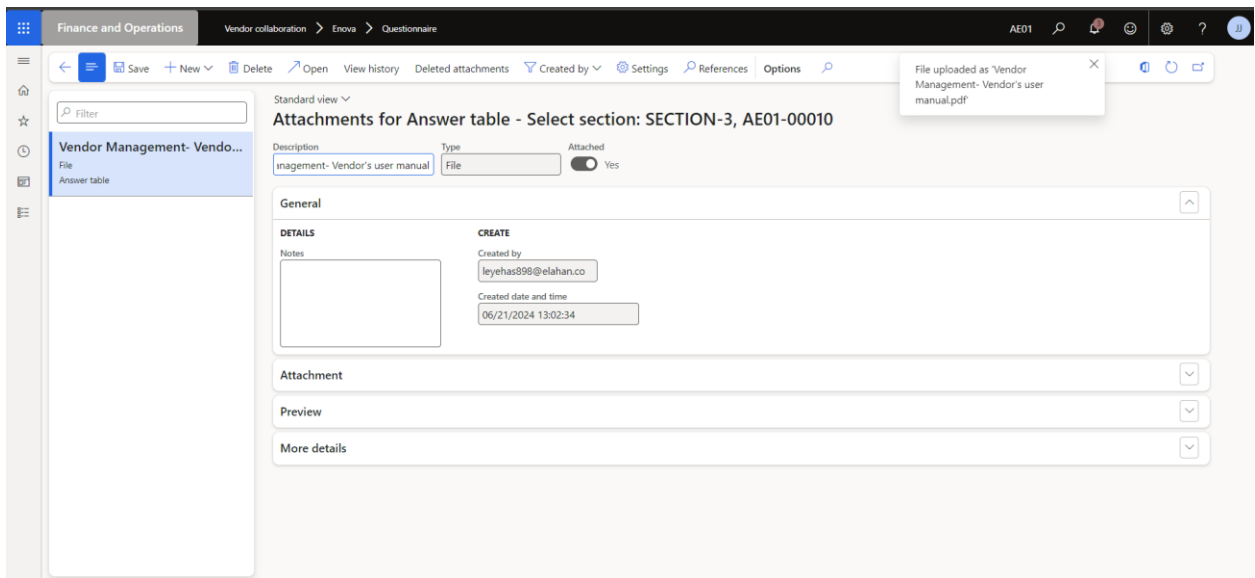
15. Select the type of file you want to upload



16. Click Browse and select the file you want to upload



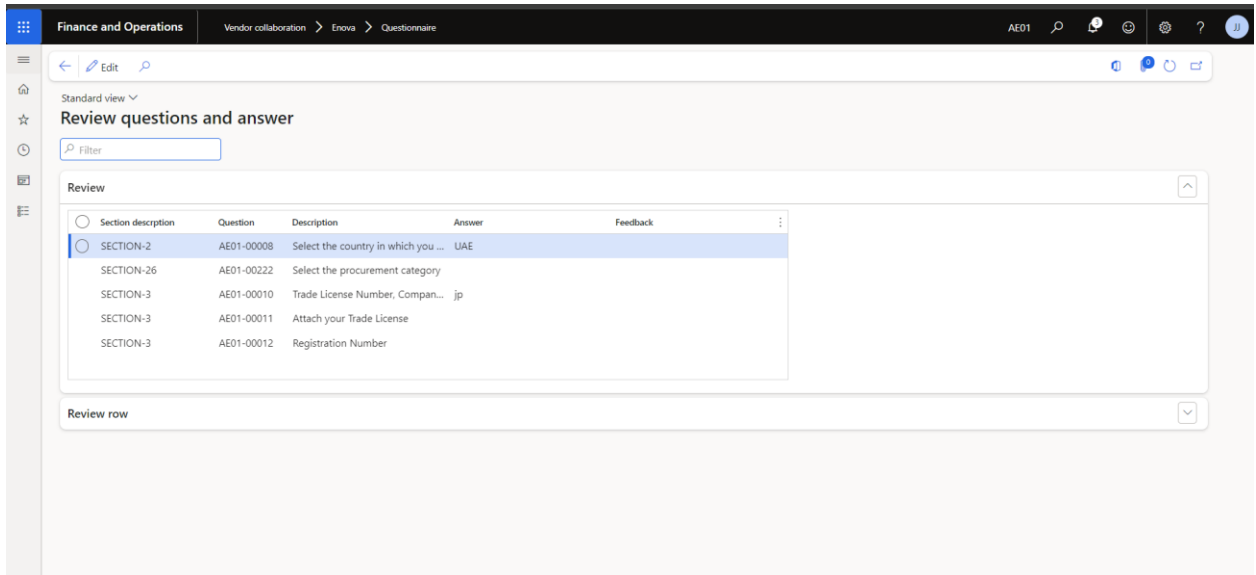
17. Click Save



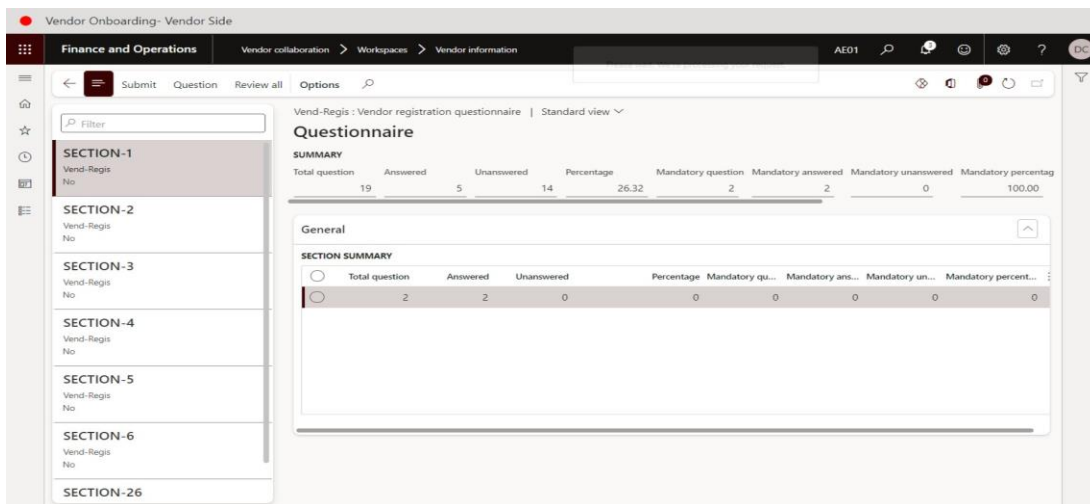
18. Click Back

19. Answer all the questions

20. The Vendor is able to review all his answers by clicking Review All.



21. Click Back and then Click **Submit**.



Once the vendor registration request has been evaluated by Enova, you will be notified by email and you will be able to access the Vendor Collaboration Portal.

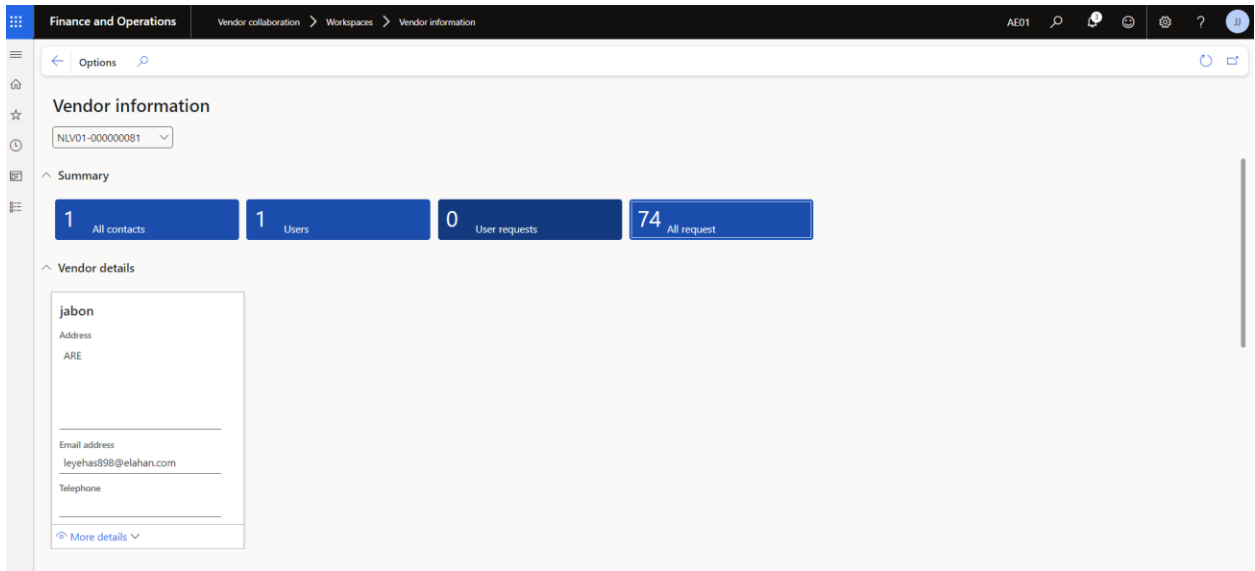
## 2 Vendor Requests

This is for you to request for new Bank Account, new Legal Entity, New Procurement category, New document request like Trade Licence, Public Liability Insurance, TRN no. etc or if you want to renew the Trade license.

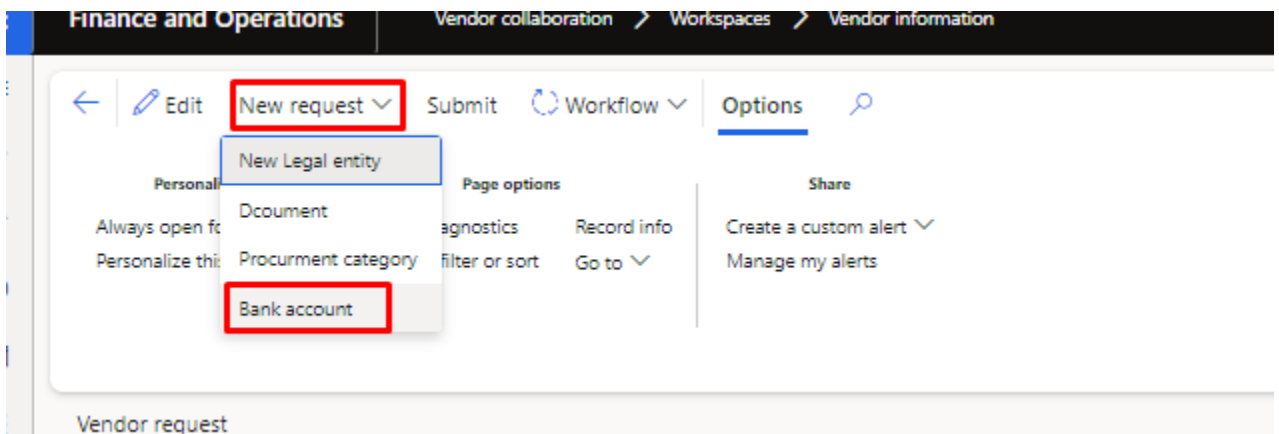
### 2.1 Bank Account Request

This is to request for new bank account to add to the client for payment process.

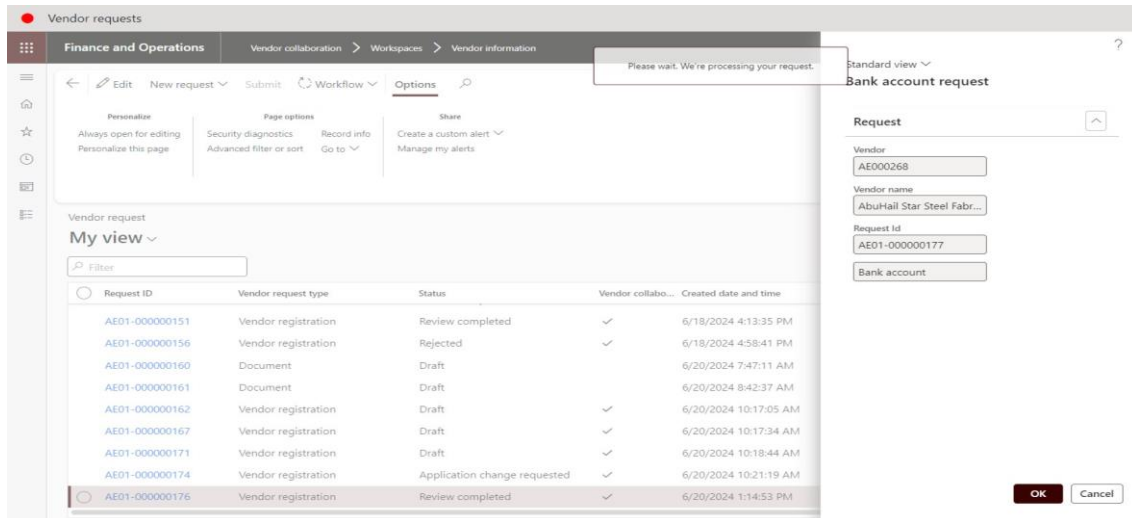
1. Go to **Vendor collaboration > Workspaces > Vendor information.**
2. Click All request.
3. Click New request.



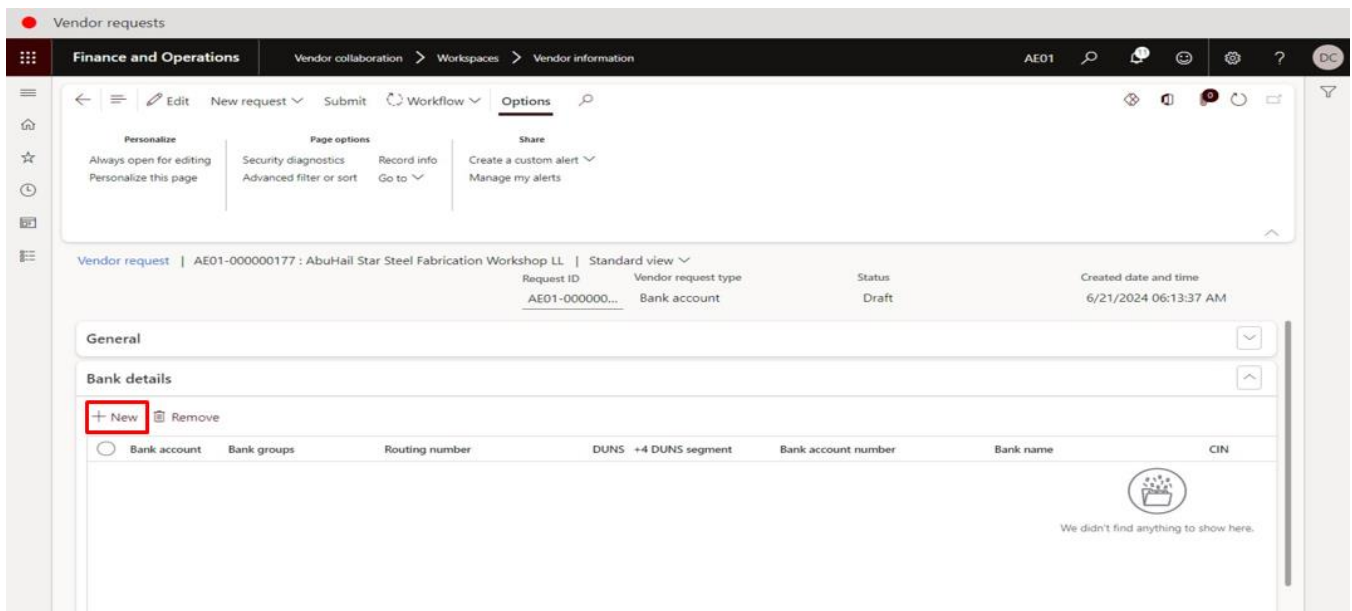
4. Click Bank account.



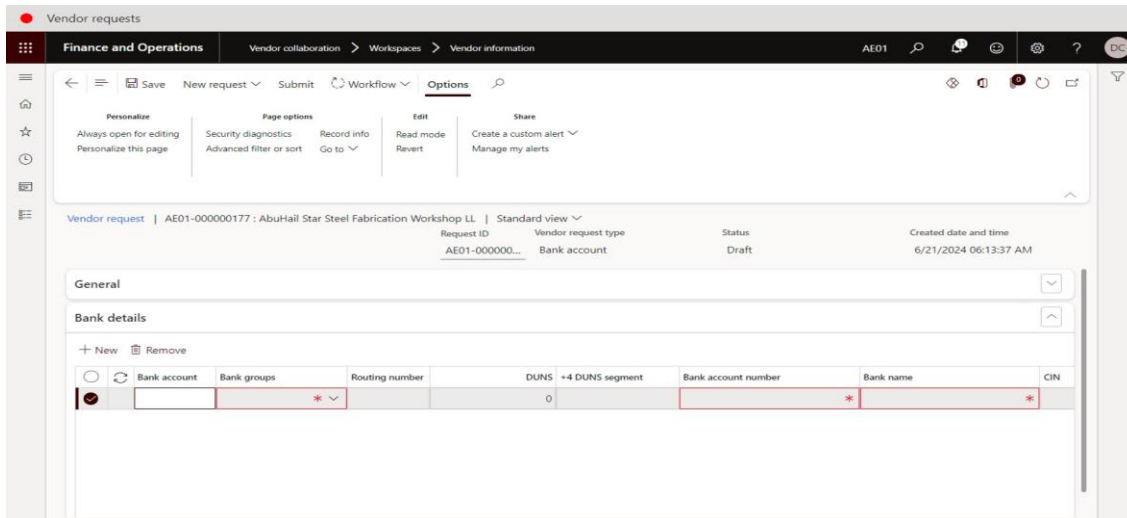
5. Click Fill details and click OK.



6. Click New under “Bank Details” fast Tab.



- Fill in all the details, the mandatory fields will be marked in red and the request cannot be saved unless they are filled.



Vendor request | AE01-00000177 : AbuHail Star Steel Fabrication Workshop LL | Standard view

Request ID	Vendor request type	Status	Created date and time
AE01-000000...	Bank account	Draft	6/21/2024 06:13:37 AM

**Bank details**

Bank account	Bank groups	Routing number	DUNS	+4 DUNS segment	Bank account number	Bank name	CIN
			0				

- Click Save.
- Click **Submit**, it will go for an approval.

## 2.2 Document Request

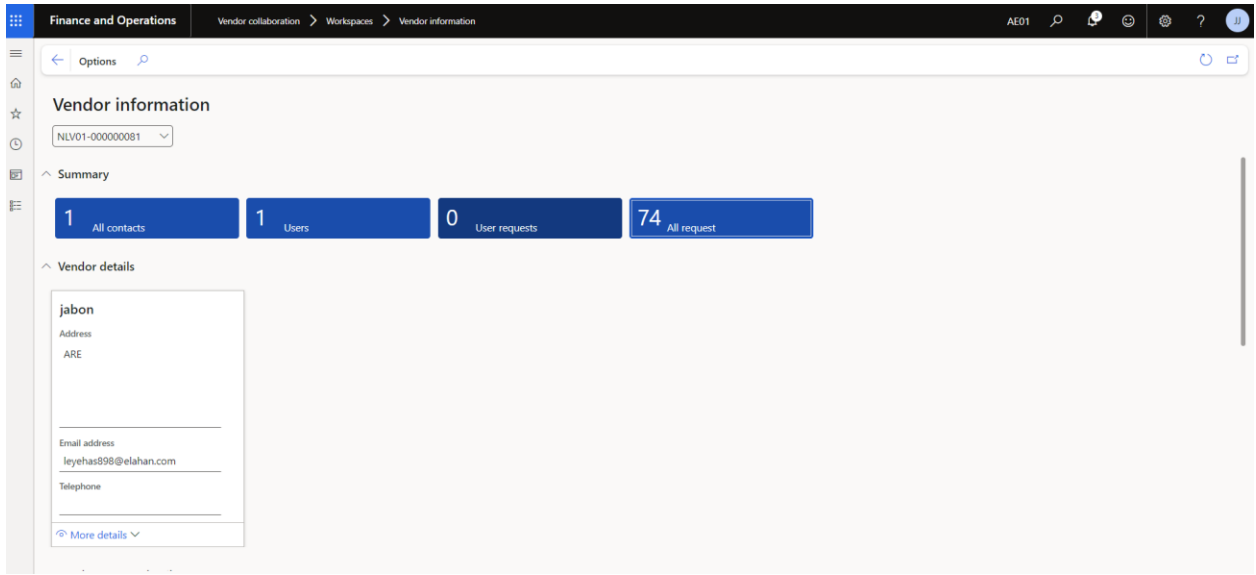
**For new Vendors:** Here you'll attach all mandatory documents which are required for example Trade license, Public Liability Insurance or VAT TRN number etc.

**For existing vendors:** If any document which are going to expire for example Trade License, Public Liability Insurance etc., you can attach as a new document and submit.

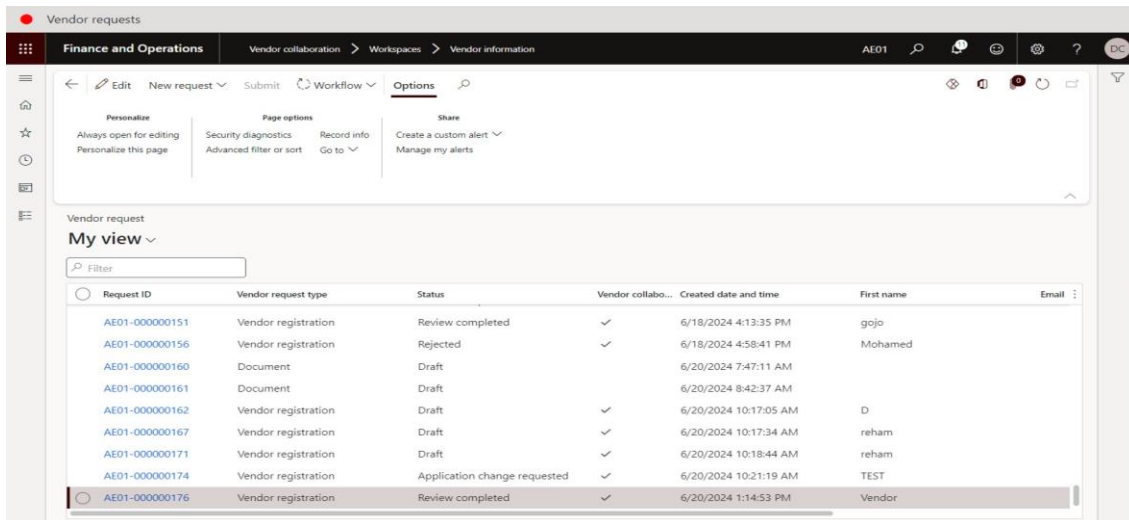
- Go to **Vendor collaboration > Workspaces > Vendor information**.



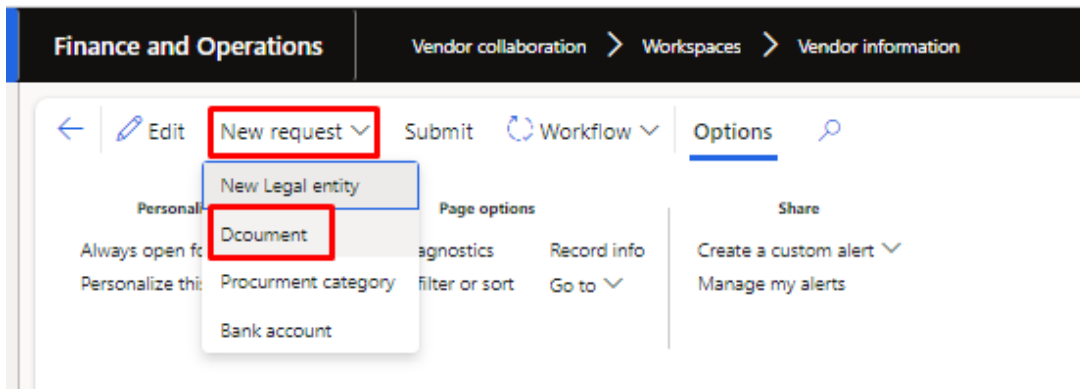
2. Click All request.



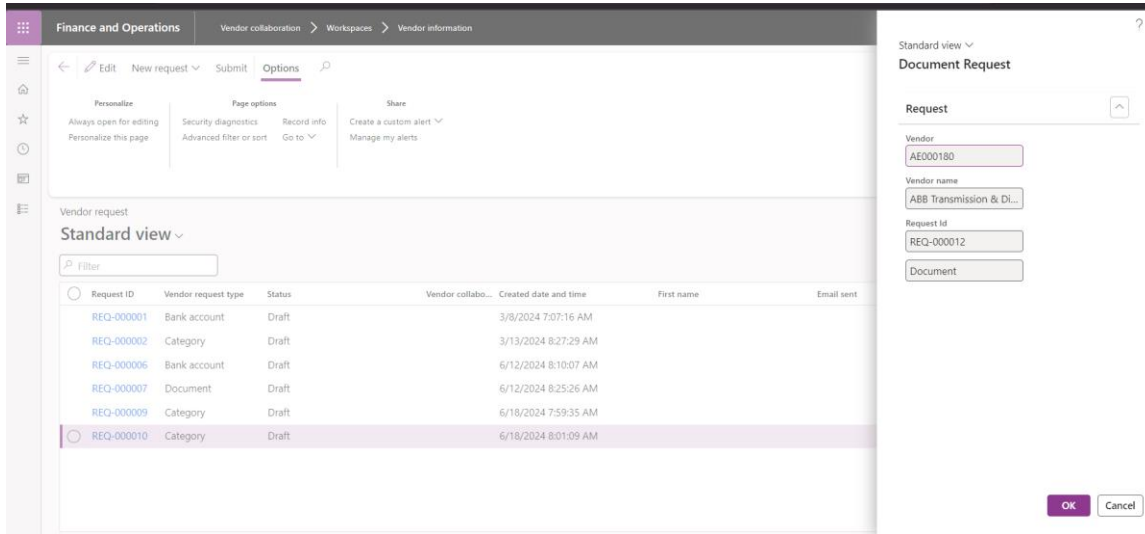
3. Click New request.



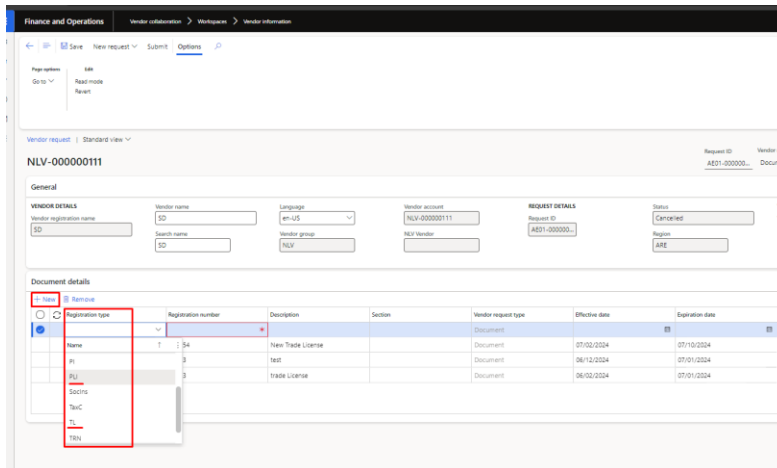
4. Click on Document.



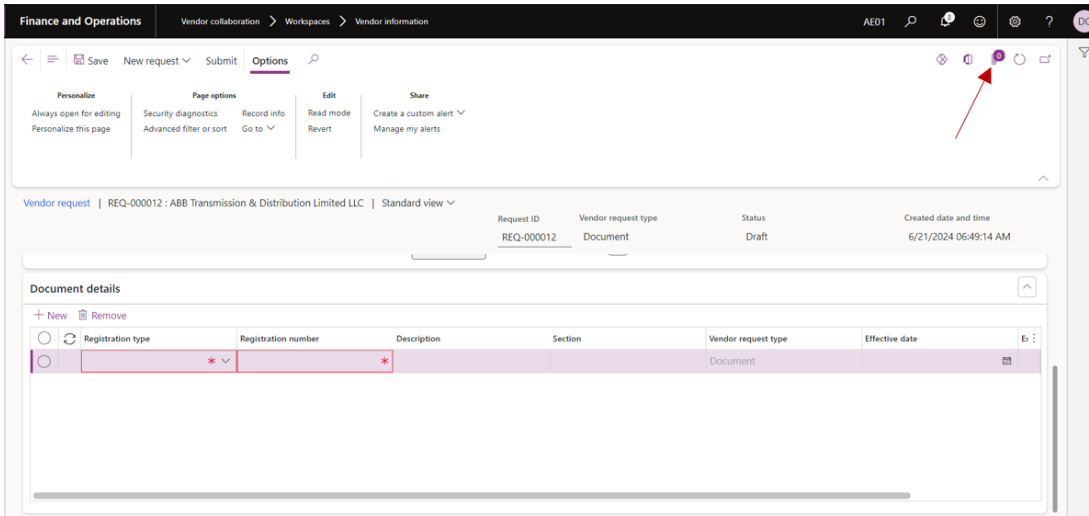
5. Click OK



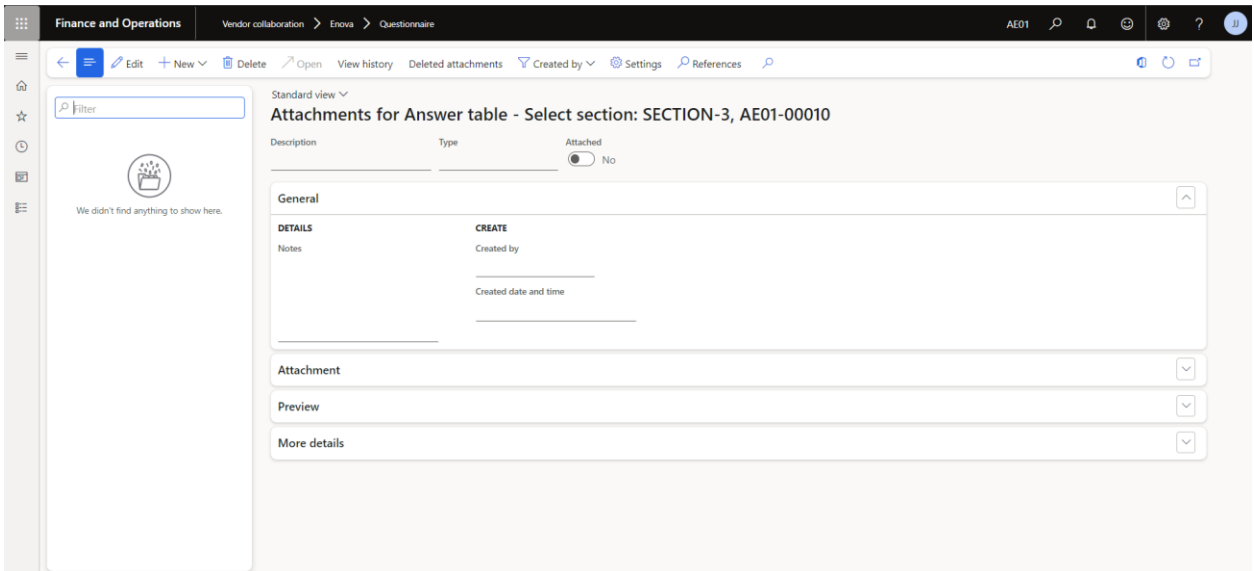
6. Fill in all the details like 'Registration type' (Trade License, PLI, PI, TRN etc), 'Registration Number', 'Effective Date', 'Expiration Date', the mandatory fields will be marked in red and the request cannot be Saved unless they're filled.



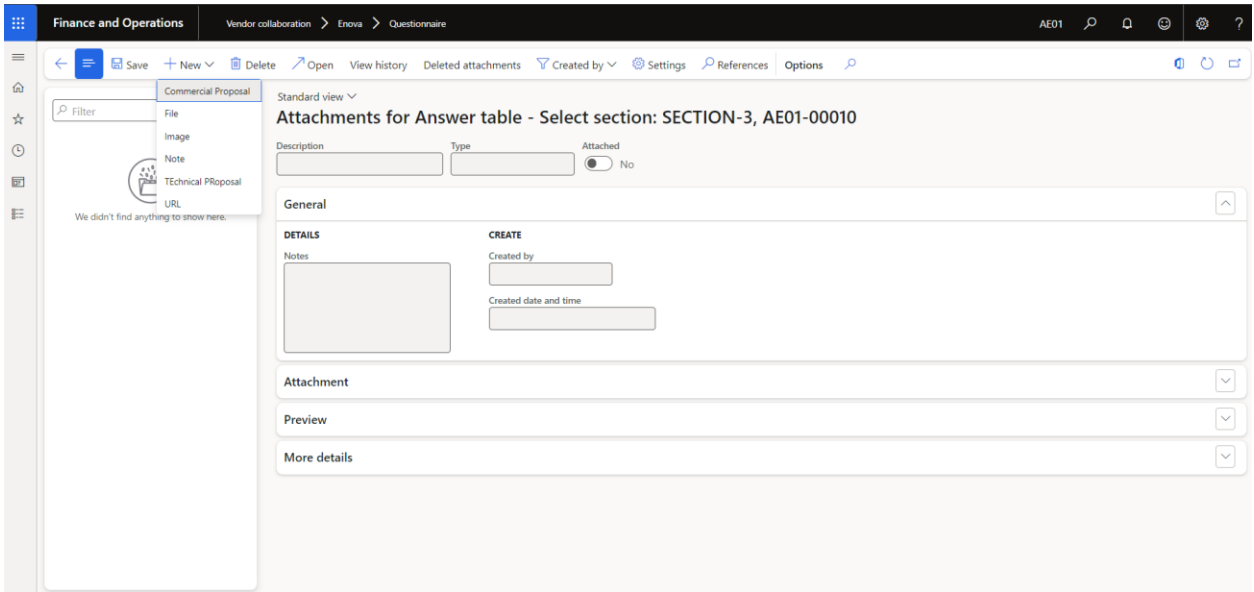
7. If any Attachment is to be added, Click on attachments



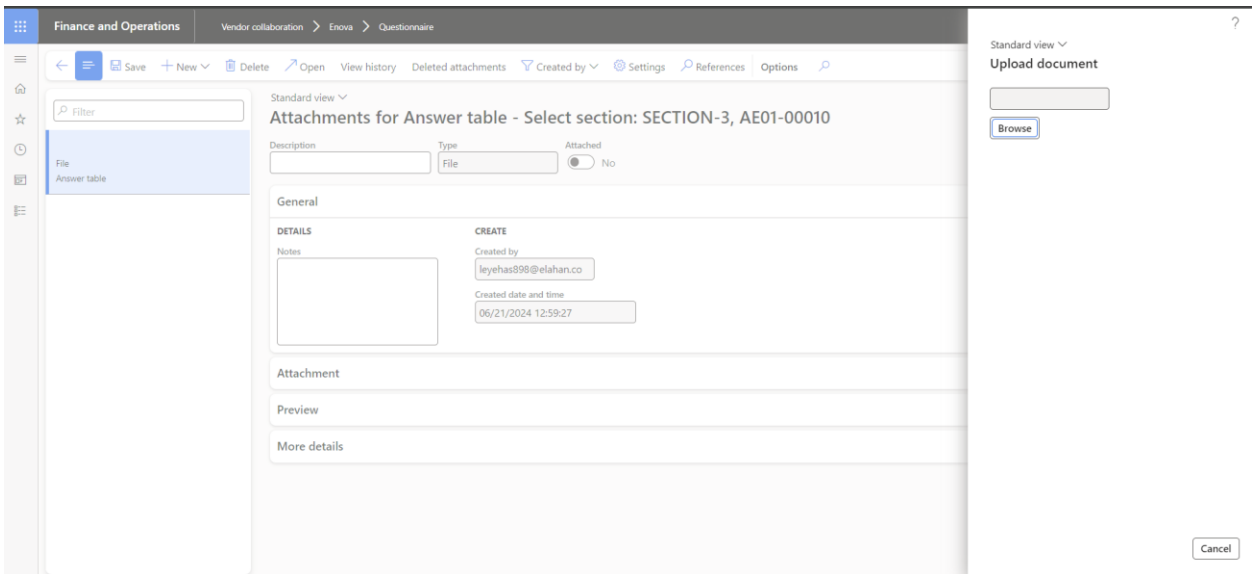
8. Click New



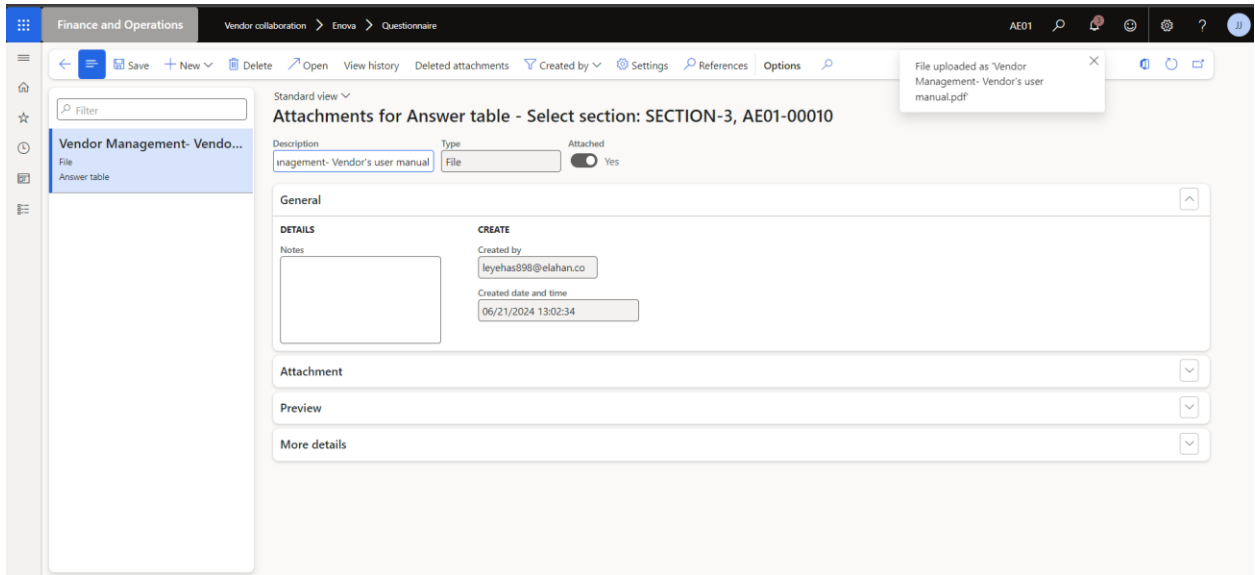
10. Select the type of file you want to upload



11. Click Browse and select the file you want to upload



12. Click Save

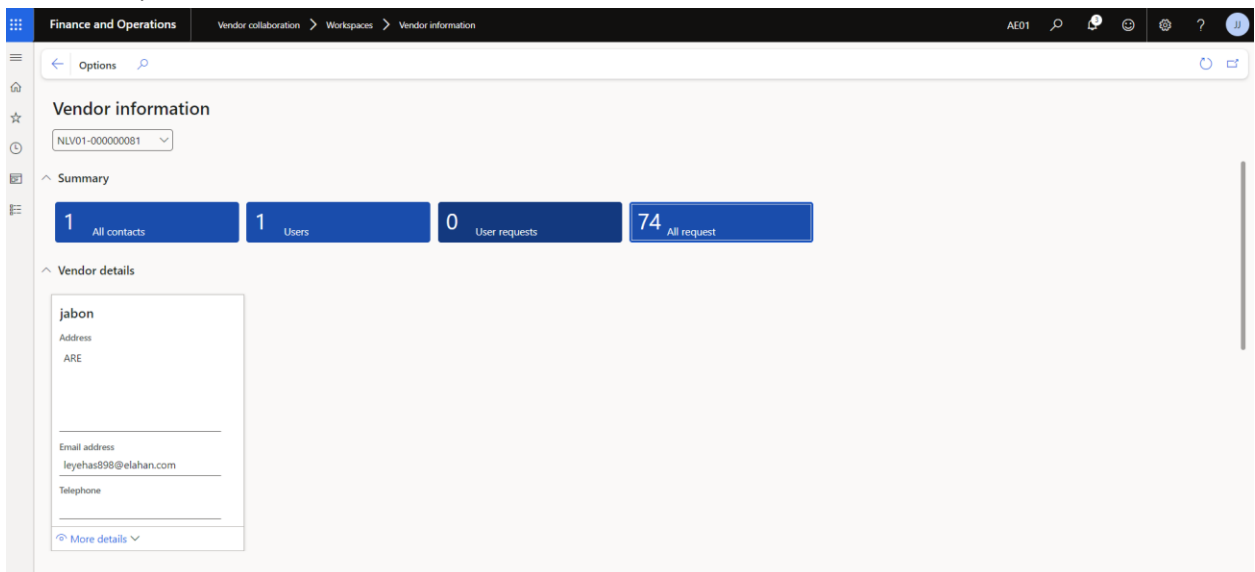


13. Click Back, then 'Save' and 'Submit'.

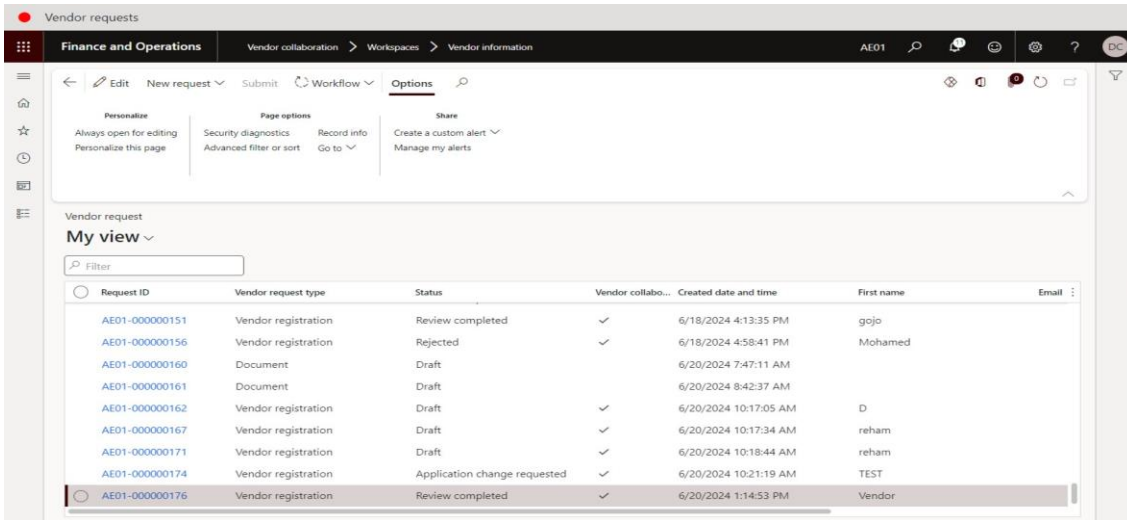
### 2.3 New Legal Entity Request

This is for the **existing vendors** to request to do the business in other legal entity under Enova Group as well. For example, currently you're doing business in UAE, later you want to expand your business to Abu Dhabi, Bahrain, Oman etc., you can create new legal entity request.

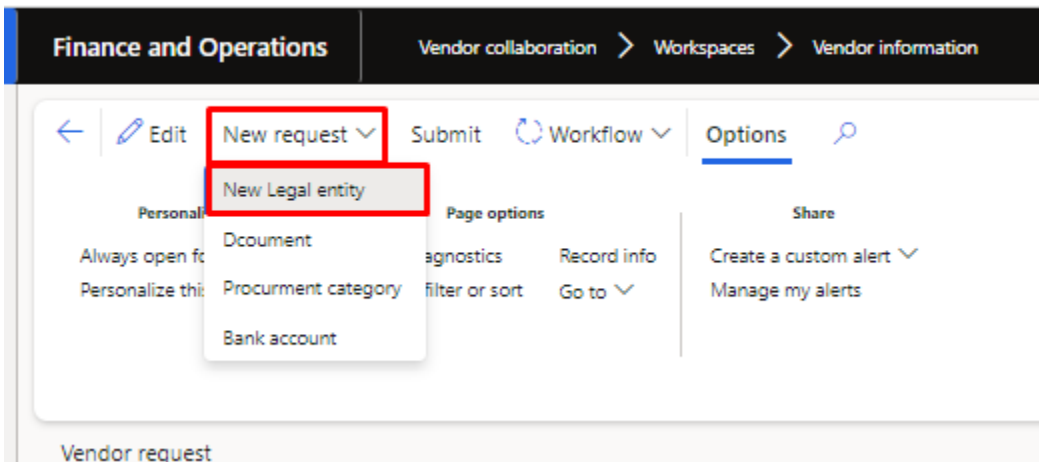
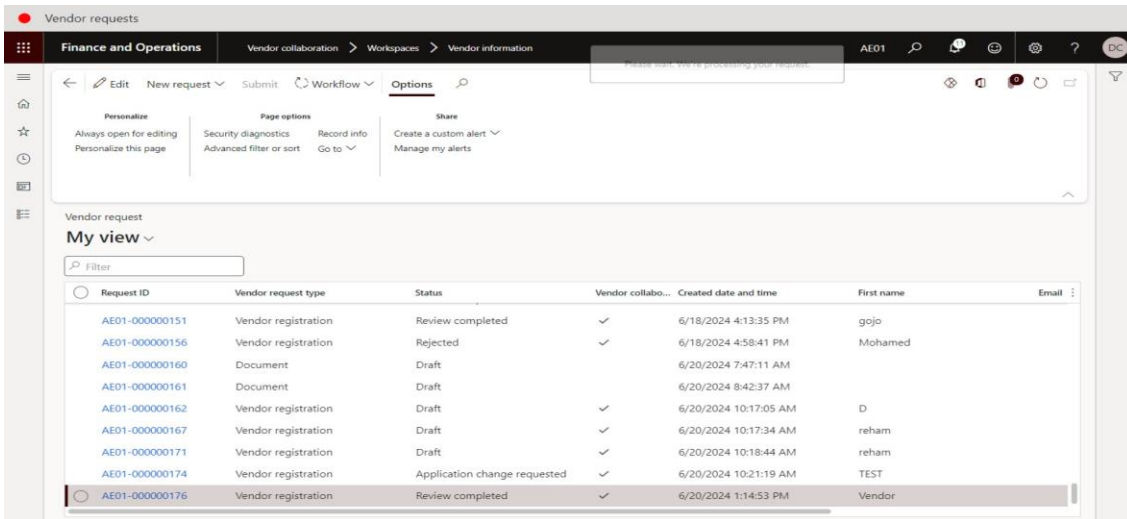
1. Go to **Vendor collaboration > Workspaces > Vendor information.**
2. Click All request.



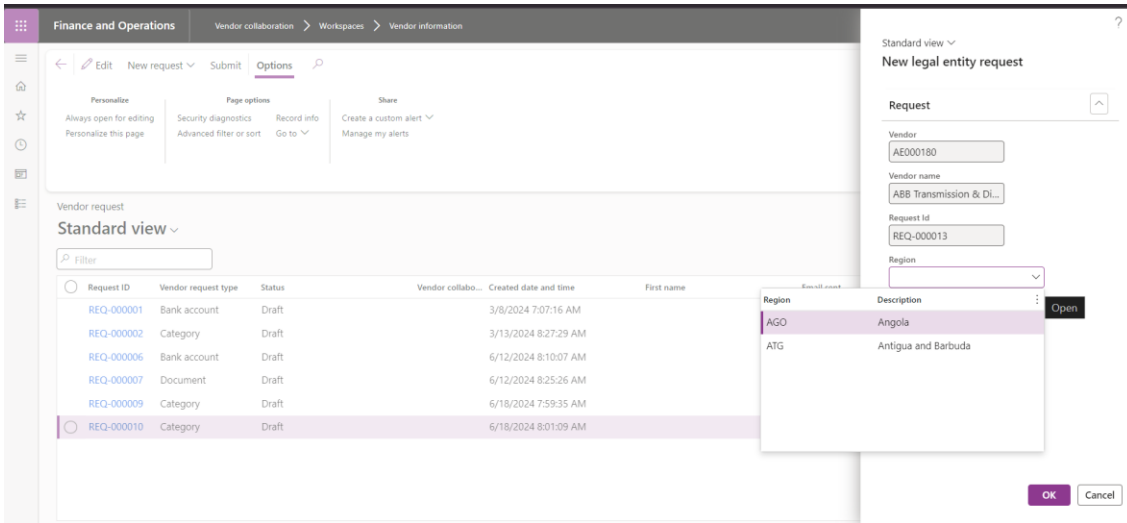
3. Click New request.



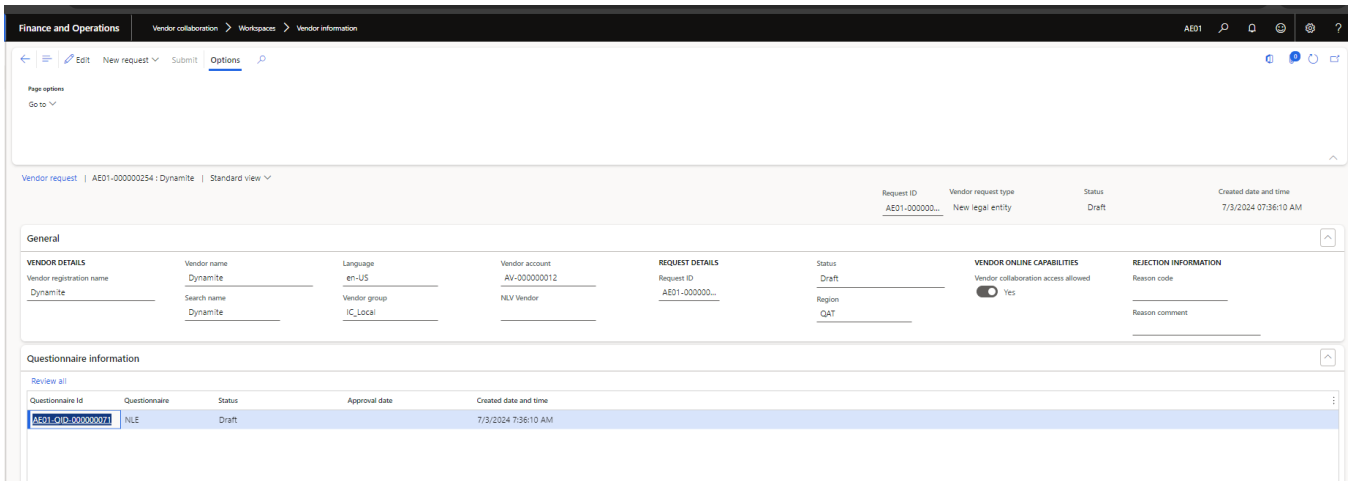
4. Click on New Legal Entity.



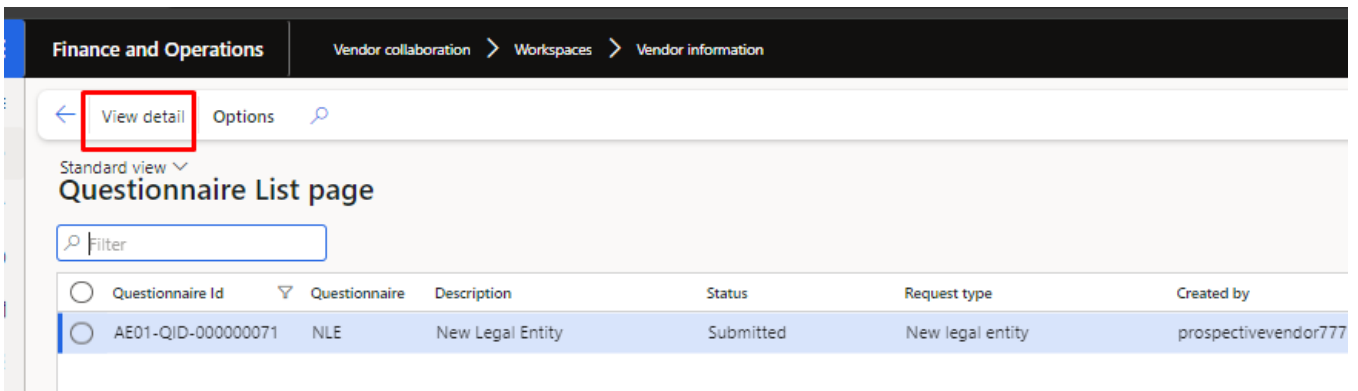
5. Select the region in which the vendor wants to operate and then click OK



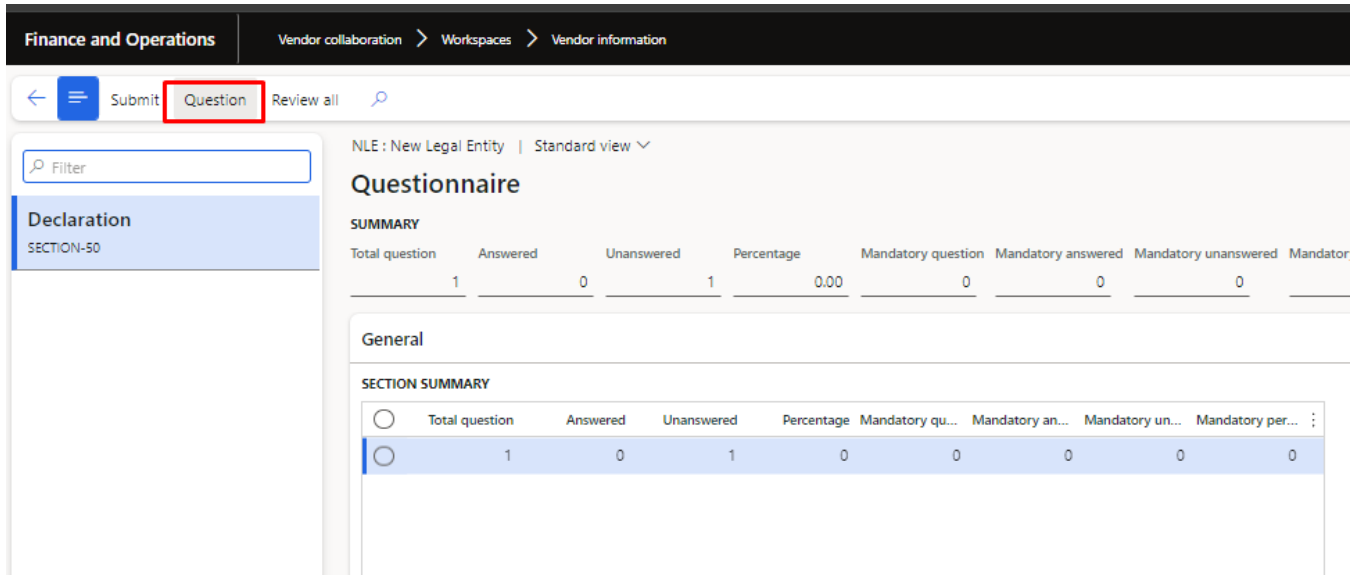
6. Once page opened, you can see the 'Questionnaire Information' fast tab, click on selected 'Questionnaire ID'.



7. Click on 'View Detail'



8. There is a declaration Questionnaire which we need to submit, for that we need to click on 'Question'.



Finance and Operations | Vendor collaboration > Workspaces > Vendor information

Submit Question Review all

Filter

Declaration  
SECTION-50

NLE: New Legal Entity | Standard view

### Questionnaire

SUMMARY

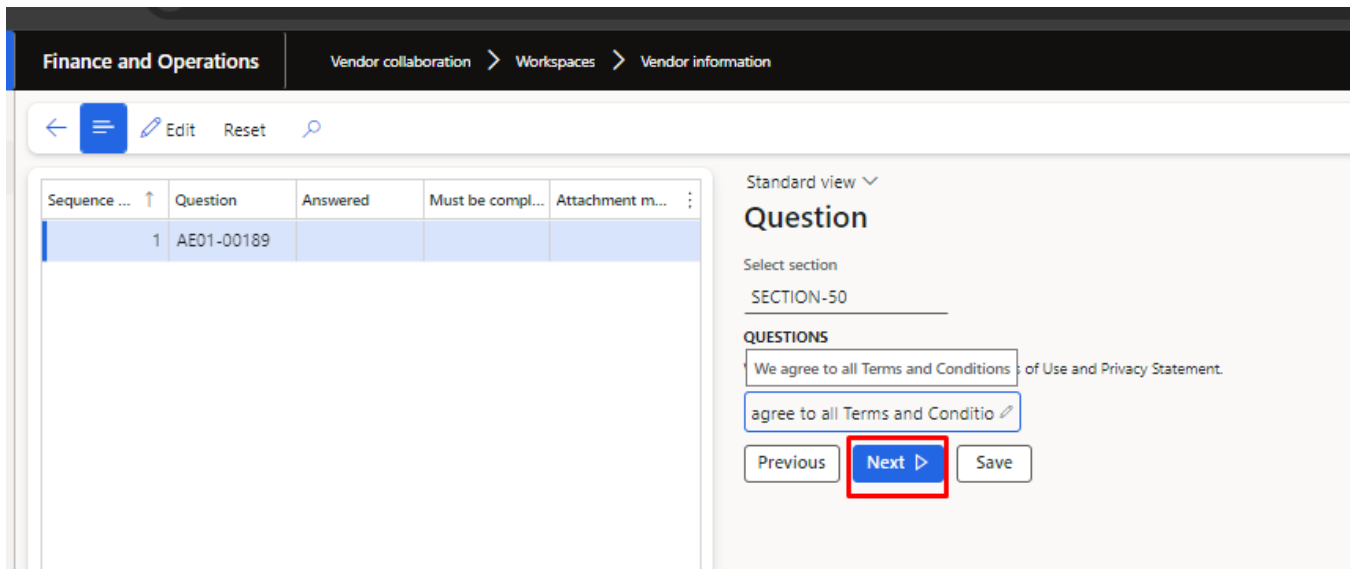
Total question	Answered	Unanswered	Percentage	Mandatory question	Mandatory answered	Mandatory unanswered	Mandator
1	0	1	0.00	0	0	0	

General

SECTION SUMMARY

Total question	Answered	Unanswered	Percentage	Mandatory qu...	Mandatory an...	Mandatory un...	Mandatory per...
1	0	1	0	0	0	0	

9. Fill all the Questionnaire one by one and click 'next', Once all Questionnaire filled then click 'Save'.



Finance and Operations | Vendor collaboration > Workspaces > Vendor information

Edit Reset

Sequence ...	Question	Answered	Must be compl...	Attachment m...
1	AE01-00189			

Standard view

### Question

Select section  
SECTION-50

QUESTIONS

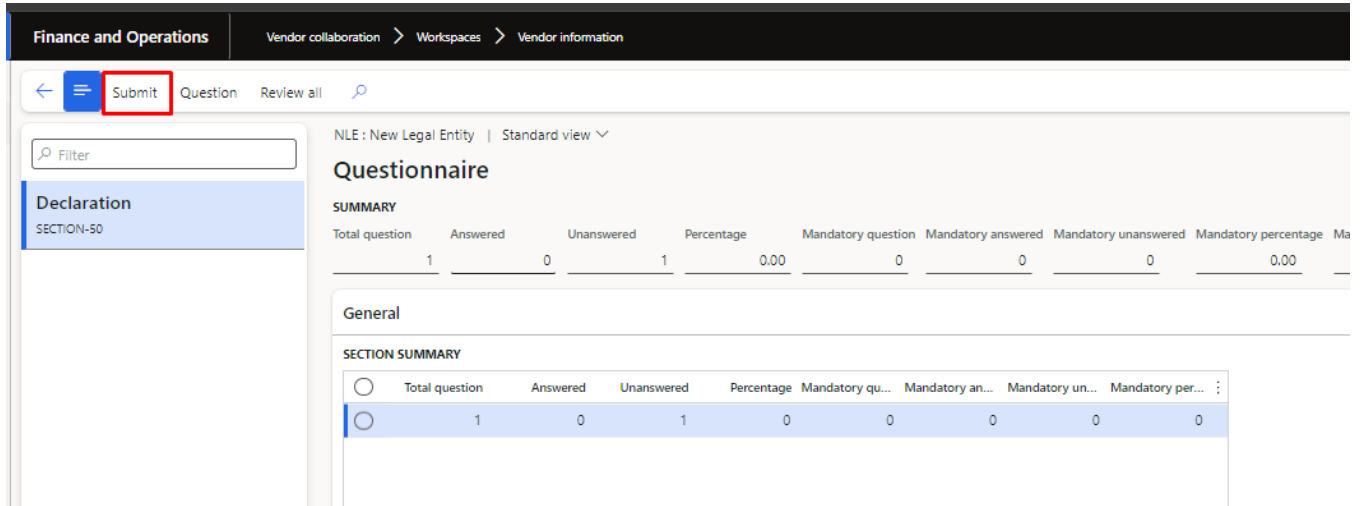
We agree to all Terms and Conditions of Use and Privacy Statement.

agree to all Terms and Conditio

Previous Next Save



10. Once Saved, it will automatically go back to that Questionnaire screen from where you can click 'Submit'.



**Finance and Operations** | Vendor collaboration > Workspaces > Vendor information

← **Submit** Question Review all

NLE: New Legal Entity | Standard view

### Questionnaire

**SUMMARY**

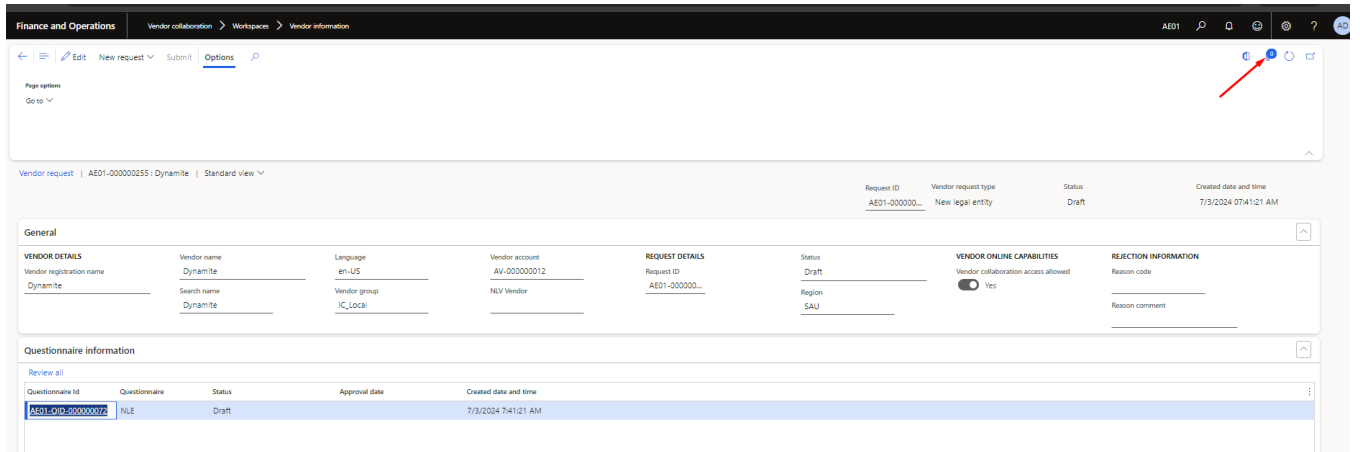
Total question	Answered	Unanswered	Percentage	Mandatory question	Mandatory answered	Mandatory unanswered	Mandatory percentage
1	0	1	0.00	0	0	0	0.00

**General**

**SECTION SUMMARY**

Total question	Answered	Unanswered	Percentage	Mandatory qu...	Mandatory an...	Mandatory un...	Mandatory per...
1	0	1	0	0	0	0	0

11. The go back to the main screen where you're requesting for new Legal entity request, attach the required documents (if any) from the attachment symbol.



**Finance and Operations** | Vendor collaboration > Workspaces > Vendor information

← Edit New request Submit Options

Page options  
Go to

Vendor request | AE01-00000255 | Dynamite | Standard view

Request ID: AE01-00000... | Vendor request type: New legal entity | Status: Draft | Created date and time: 7/3/2024 7:41:21 AM

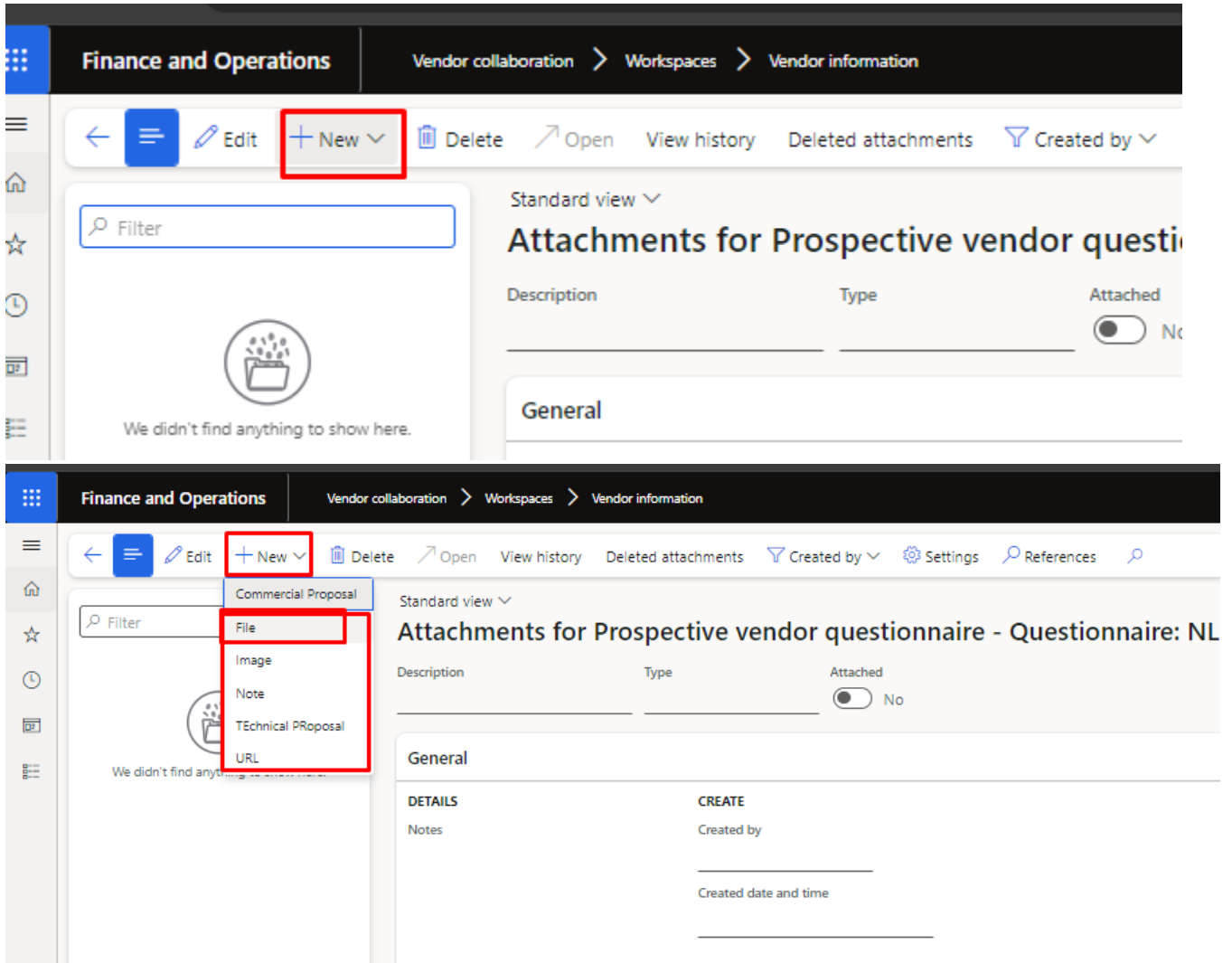
**General**

VENDOR DETAILS	Language	Vendor account	REQUEST DETAILS	Status	VENDOR ONLINE CAPABILITIES	REJECTION INFORMATION
Vendor registration name: Dynamite Vendor name: Dynamite Search name: Dynamite	en-US Vendor group: IC_Local	AV-00000012 NEV Vendor	Request ID: AE01-00000...	Draft Region: SAU	Vendor collaboration access allowed: Yes	Reason code Reason comment

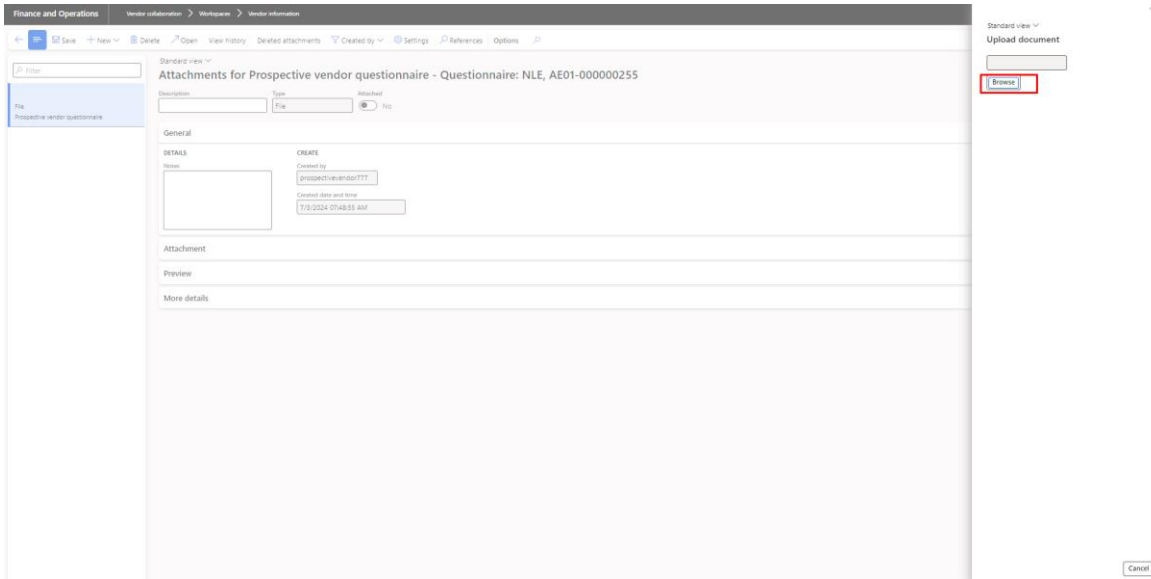
**Questionnaire information**

Questionnaire Id	Questionnaire	Status	Approval date	Created date and time
AE01-010-00000072	NLE	Draft		7/3/2024 7:41:21 AM

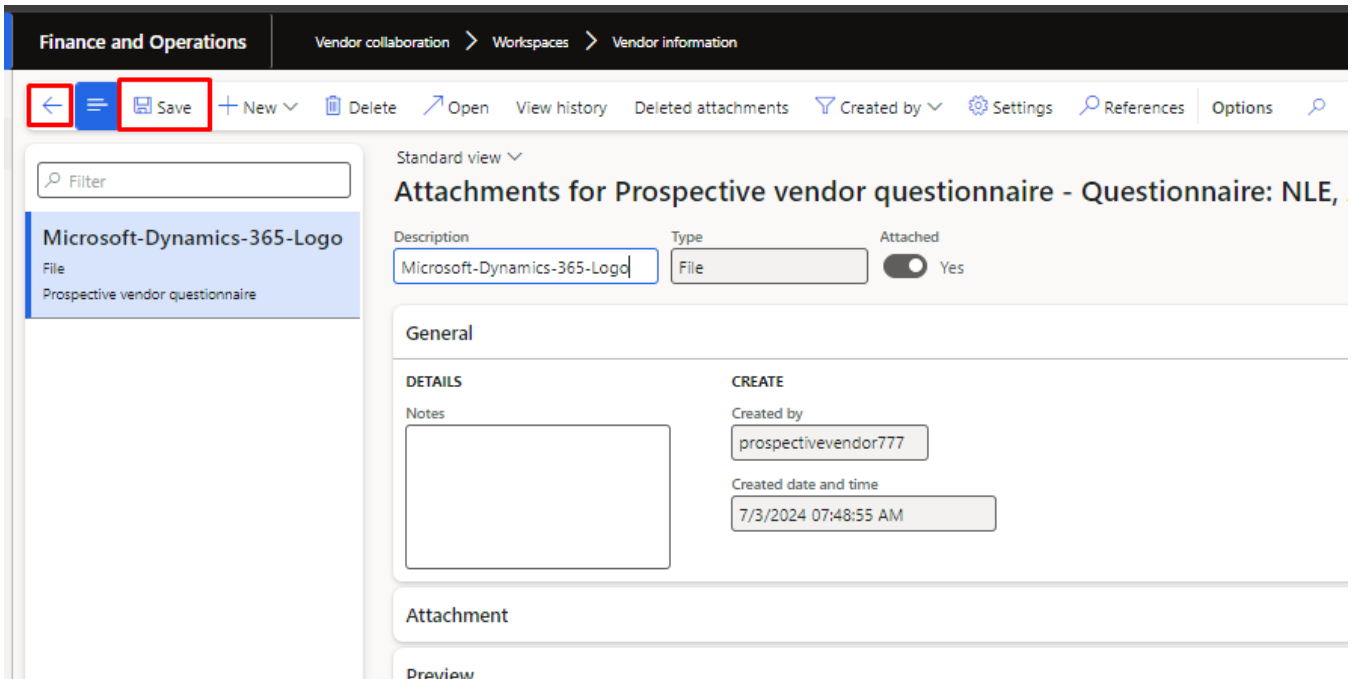
12. Click 'New' to attach new document. List of documents are also reflecting here



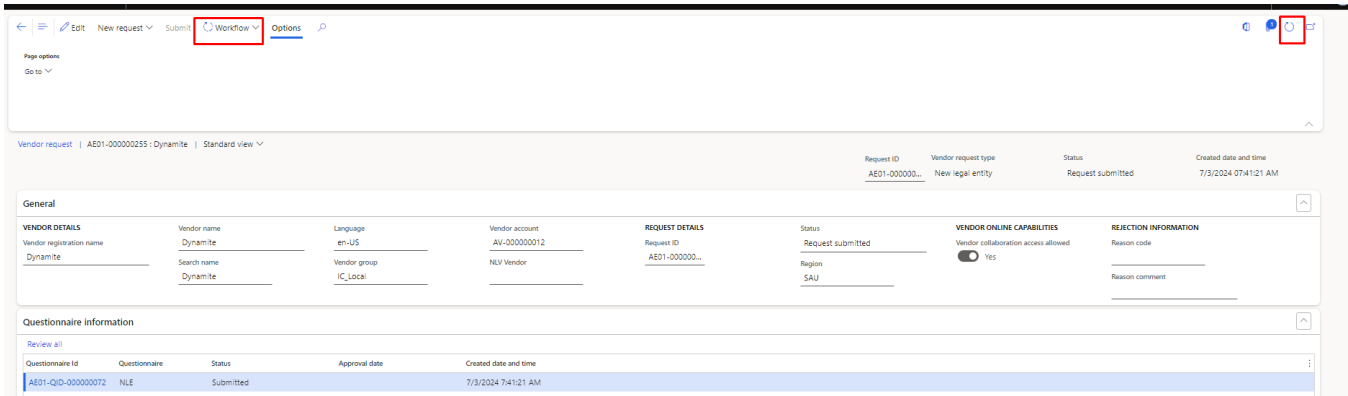
13. Click Browse and select the document.



14. Click Save and go back



15. Then 'Refresh' the Page (see top-right) then you can see the 'workflow' button which got enabled.

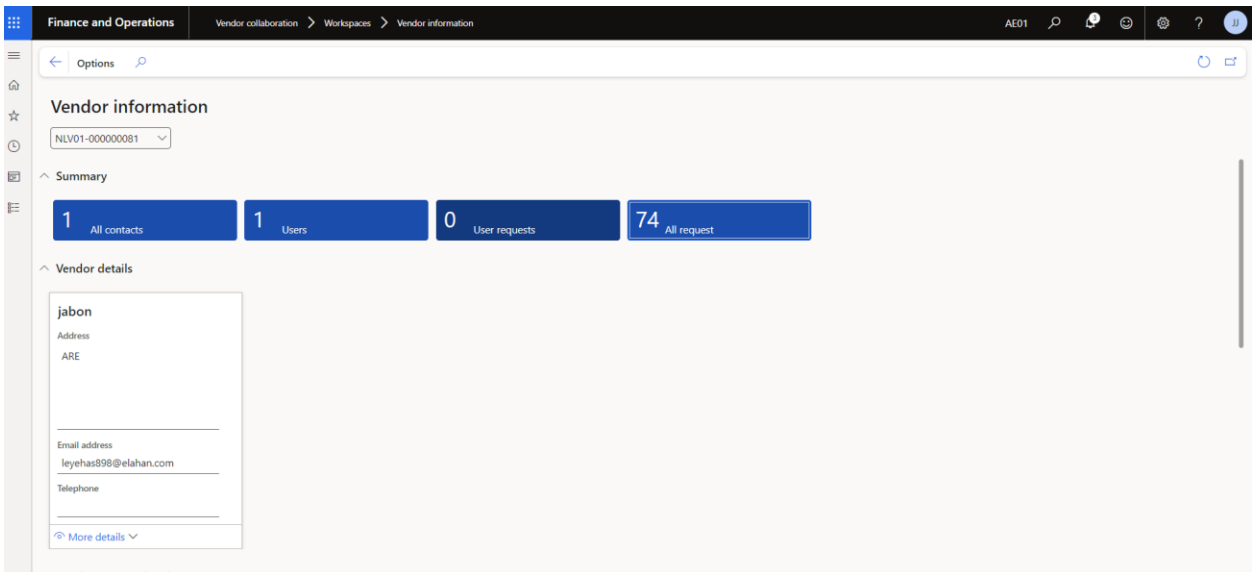


Once it will be approved by the client. Then you will be released as a vendor for requested Legal Entity.

## 2.4 Additional Procurement Category Request

Procurement categories help classify vendor items and services. They also help control which vendors and products are available to employees when they make business-related purchases.

1. Go to **Vendor collaboration > Workspaces > Vendor information.**
2. Click All Requests



3. Click New request.

The screenshot shows the 'Vendor requests' interface. At the top, there are navigation tabs: 'Finance and Operations', 'Vendor collaboration', 'Workspaces', and 'Vendor information'. Below the navigation, there are action buttons: 'Edit', 'New request', 'Submit', and 'Workflow'. A 'Personalize' section is visible with options like 'Always open for editing' and 'Personalize this page'. A 'Page options' section includes 'Security diagnostics', 'Record info', and 'Go to'. A 'Share' section includes 'Create a custom alert' and 'Manage my alerts'. Below these sections, there is a 'Vendor request' section with a 'My view' dropdown and a search filter. The main content is a table of requests:

Request ID	Vendor request type	Status	Vendor collabo...	Created date and time	First name	Email
AE01-000000151	Vendor registration	Review completed	✓	6/18/2024 4:13:35 PM	gojo	
AE01-000000156	Vendor registration	Rejected	✓	6/18/2024 4:58:41 PM	Mohamed	
AE01-000000160	Document	Draft		6/20/2024 7:47:11 AM		
AE01-000000161	Document	Draft		6/20/2024 8:42:37 AM		
AE01-000000162	Vendor registration	Draft	✓	6/20/2024 10:17:05 AM	D	
AE01-000000167	Vendor registration	Draft	✓	6/20/2024 10:17:34 AM	reham	
AE01-000000171	Vendor registration	Draft	✓	6/20/2024 10:18:44 AM	reham	
AE01-000000174	Vendor registration	Application change requested	✓	6/20/2024 10:21:19 AM	TEST	
AE01-000000176	Vendor registration	Review completed	✓	6/20/2024 1:14:53 PM	Vendor	

4. Click on procurement category.

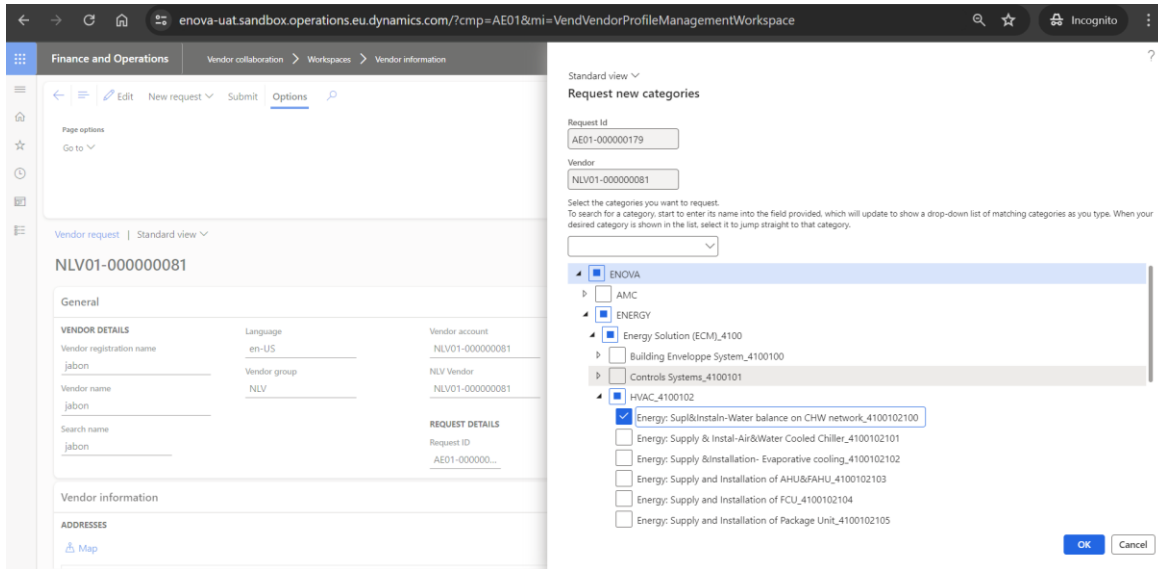
The screenshot shows the 'Vendor requests' interface with a 'Please wait, we're processing your request.' message at the top. The 'New request' dropdown menu is open, showing the following options:

- New Legal entity
- Document
- Procurement category
- Bank account

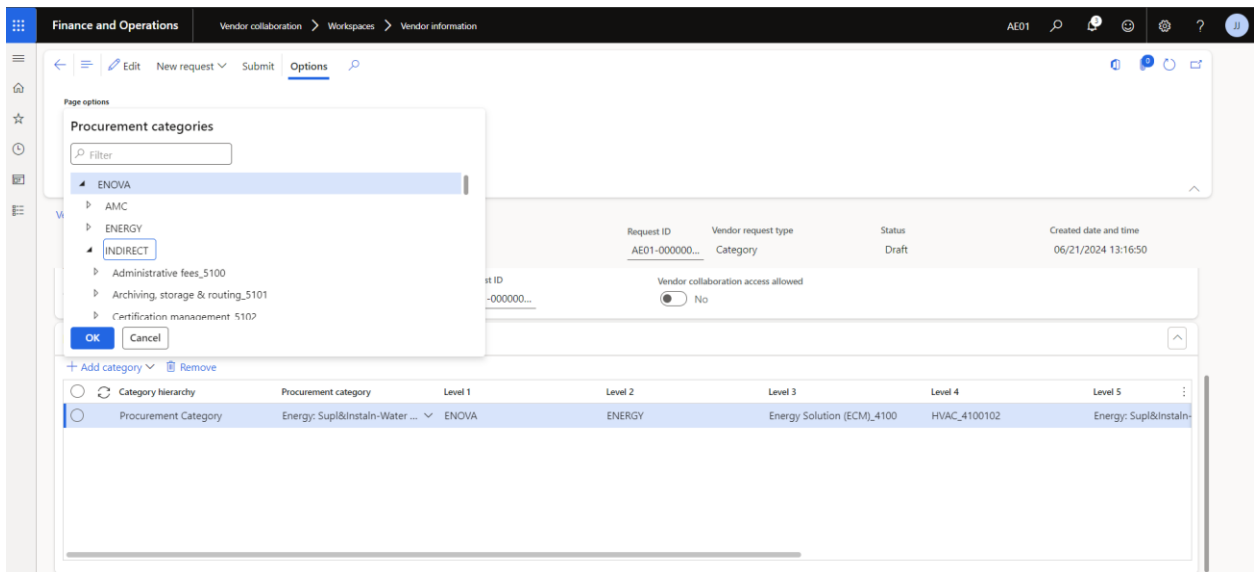
The 'Procurement category' option is highlighted with a red box. Below the dropdown, the 'Personalize' section is visible with options like 'Always open for editing' and 'Personalize this page'. The 'Page options' section includes 'Security diagnostics', 'Record info', and 'Go to'. The 'Share' section includes 'Create a custom alert' and 'Manage my alerts'. Below these sections, there is a 'Vendor request' section with a 'My view' dropdown and a search filter. The main content is a table of requests:

Request ID	Vendor request type	Status	Vendor collabo...	Created date and time	First name	Email
AE01-000000151	Vendor registration	Review completed	✓	6/18/2024 4:13:35 PM	gojo	
AE01-000000156	Vendor registration	Rejected	✓	6/18/2024 4:58:41 PM	Mohamed	
AE01-000000160	Document	Draft		6/20/2024 7:47:11 AM		
AE01-000000161	Document	Draft		6/20/2024 8:42:37 AM		
AE01-000000162	Vendor registration	Draft	✓	6/20/2024 10:17:05 AM	D	
AE01-000000167	Vendor registration	Draft	✓	6/20/2024 10:17:34 AM	reham	
AE01-000000171	Vendor registration	Draft	✓	6/20/2024 10:18:44 AM	reham	
AE01-000000174	Vendor registration	Application change requested	✓	6/20/2024 10:21:19 AM	TEST	
AE01-000000176	Vendor registration	Review completed	✓	6/20/2024 1:14:53 PM	Vendor	

5. Select the Category that is to be requested and click OK



6. In case more categories are to be added, click on add category and select the category to be added

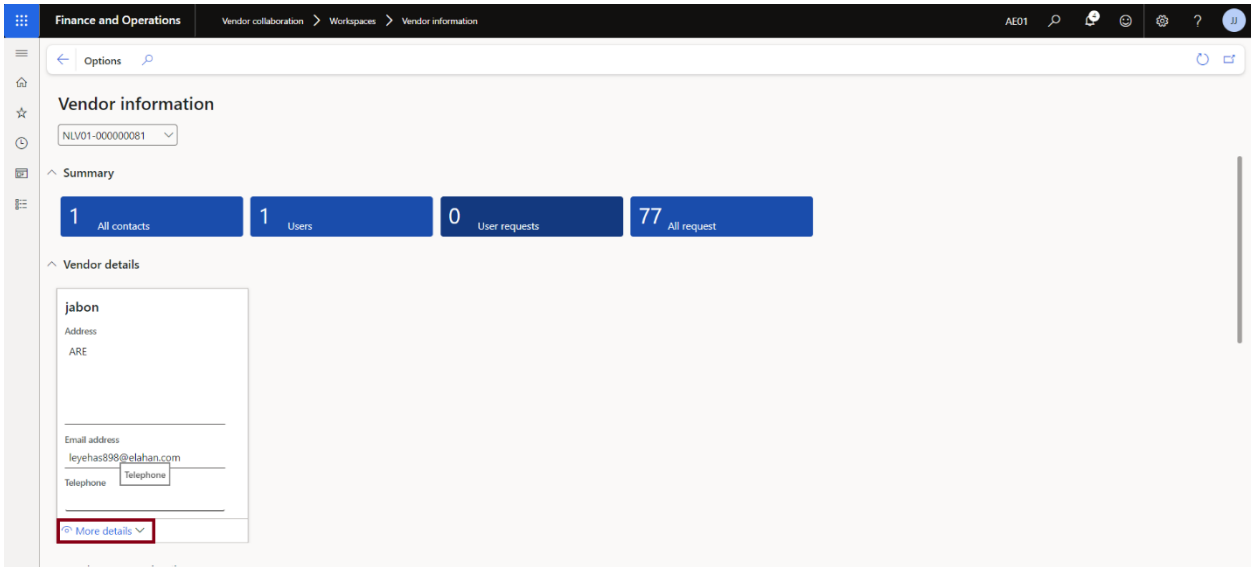


7. Click Submit.

The vendor can see all his details under:

1. **Vendor collaboration > Workspaces > Vendor information.**

2. Click on More details and selecting the information that he wants to see

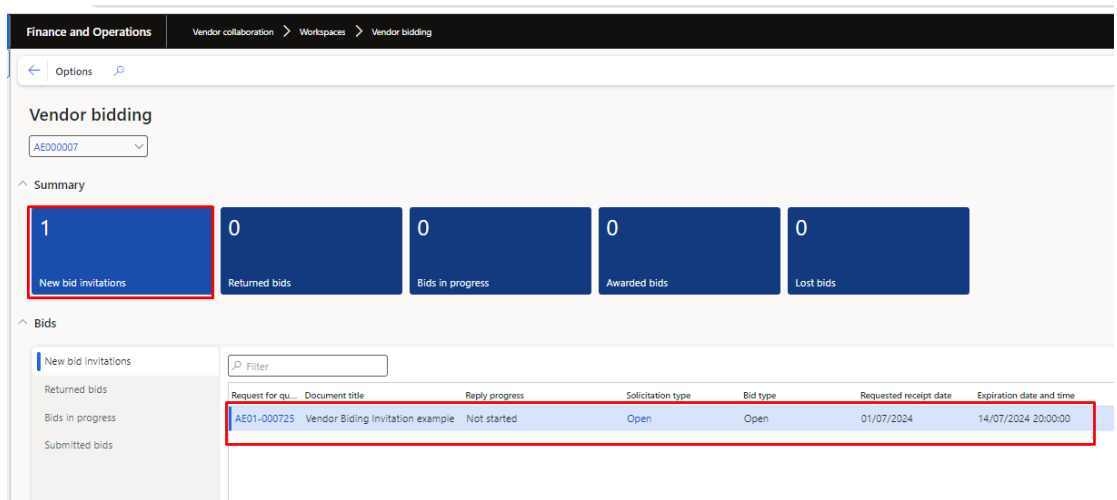


### 3 Bidding Invitation and Tender Submission

#### 3.1 Tender proposal submission

Please follow the below steps to respond to Enova Tenders.

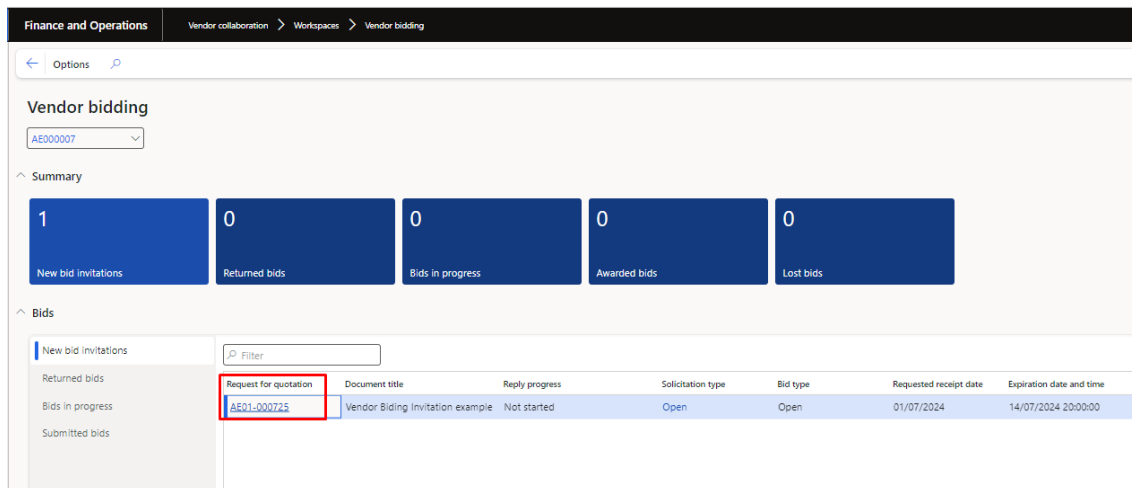
1. Go to **Vendor collaboration > Workspaces > Vendor Bidding**.
2. You can see the **'New Bid invitation'** in your workspace under "Summary" tab.



The screenshot shows the 'Vendor bidding' summary page. The 'Summary' section contains five blue cards with the following values: 'New bid invitations' (1), 'Returned bids' (0), 'Bids in progress' (0), 'Awarded bids' (0), and 'Lost bids' (0). The 'New bid invitations' card is highlighted with a red box. Below the summary is a 'Bids' section with a table of bid invitations. The first row is highlighted with a red box.

Request for qu...	Document title	Reply progress	Solicitation type	Bid type	Requested receipt date	Expiration date and time
AE01-000725	Vendor Biding Invitation example	Not started	Open	Open	01/07/2024	14/07/2024 20:00:00

3. You can click on document which you've received under 'Request for quotation'.

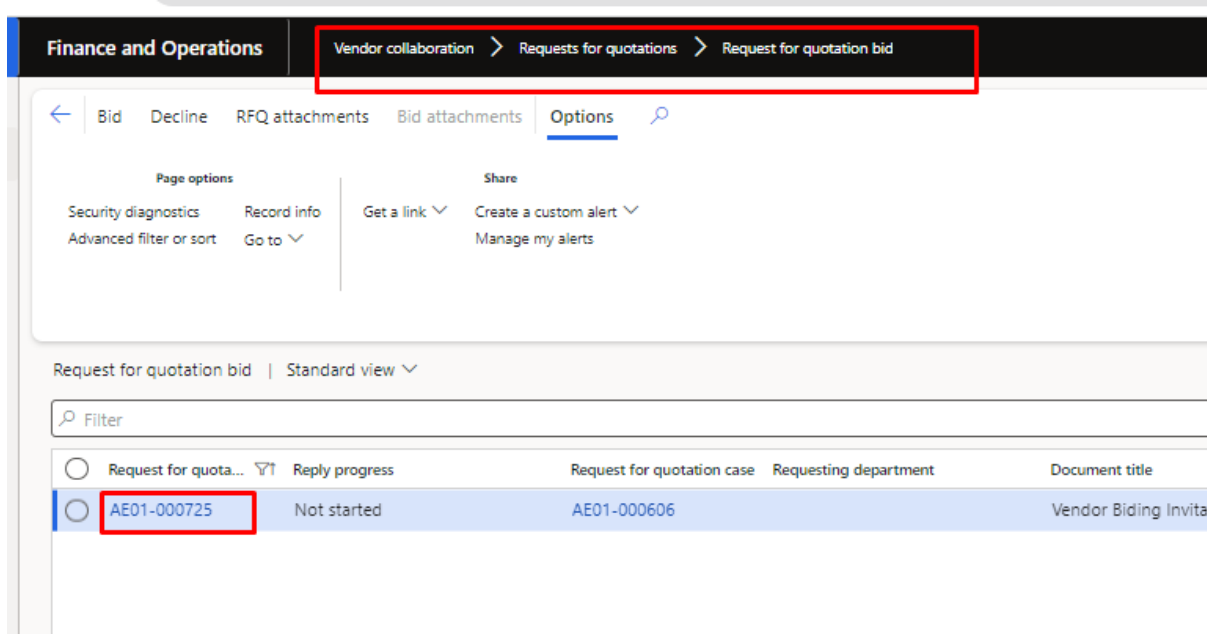


The screenshot shows the 'Vendor bidding' summary page. The 'Summary' section contains five blue cards with the following values: 'New bid invitations' (1), 'Returned bids' (0), 'Bids in progress' (0), 'Awarded bids' (0), and 'Lost bids' (0). The 'New bid invitations' card is highlighted with a red box. Below the summary is a 'Bids' section with a table of bid invitations. The first row is highlighted with a red box, and the 'Request for quotation' link is also highlighted with a red box.

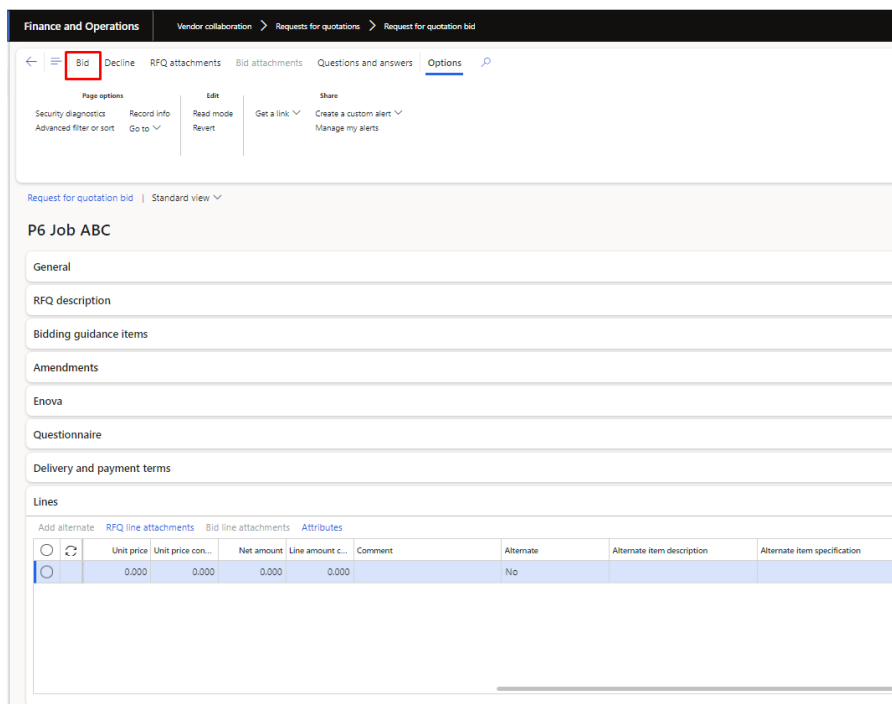
Request for quotation	Document title	Reply progress	Solicitation type	Bid type	Requested receipt date	Expiration date and time
AE01-000725	Vendor Biding Invitation example	Not started	Open	Open	01/07/2024	14/07/2024 20:00:00

4. Or, you can go to **Vendor collaboration > Requests for quotations > Request for quotation bid**
5. Open the document which you received for bidding.



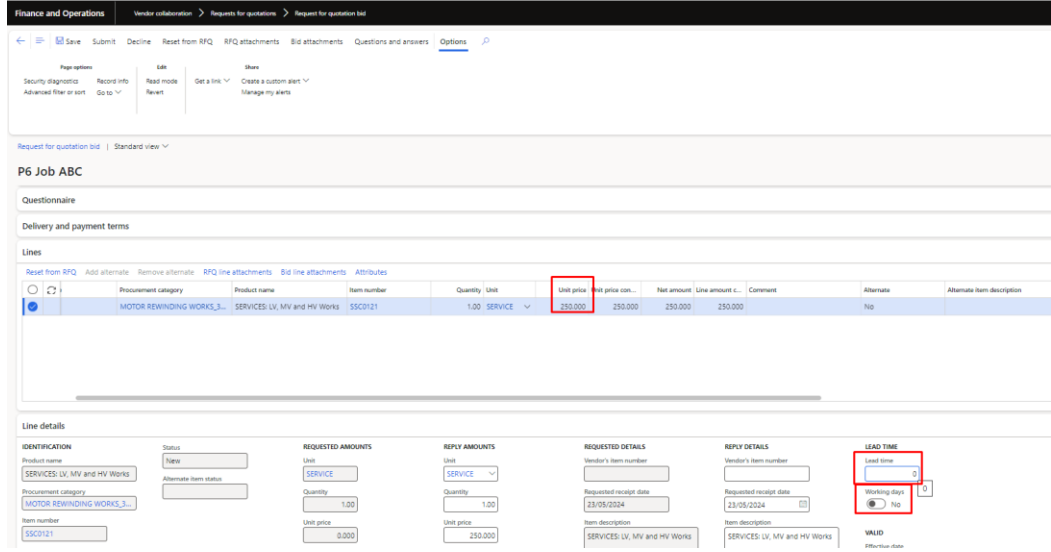


6. Open the document and click on “Bid” to do the bidding.



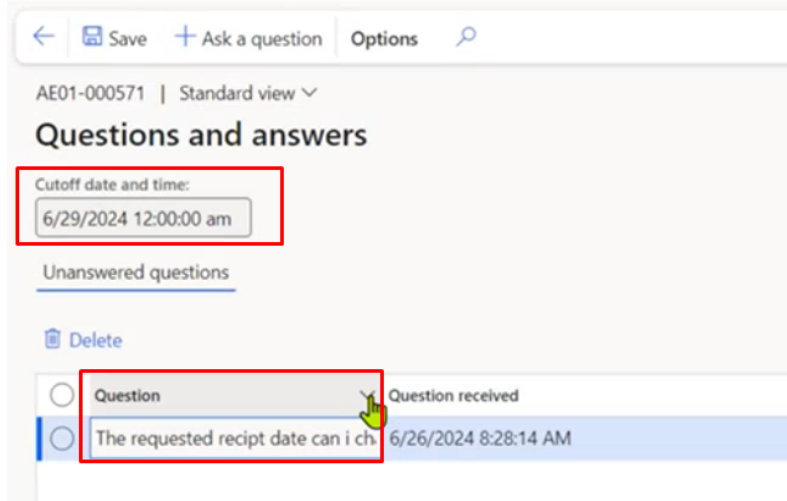
7. Page will be in editable mode. Now you can update the unit price for selected item under “Lines”. Also you can update the “Lead time” like ‘by when you can deliver the

item'. Also you can enable or disable the "Working days" with respect to the lead time.



The screenshot shows the 'Request for quotation bid' interface for 'P6 Job ABC'. A table lists items with columns for 'Unit price', 'Net amount', and 'Line amount'. The 'Unit price' for 'MOTOR REWINDING WORKS,3...' is highlighted with a red box. Below the table, the 'Line details' section includes a 'LEAD TIME' sub-section where the 'Working days' checkbox is checked and highlighted with a red box.

8. Please make sure that you're doing this activity before the Cutoff date.



The screenshot shows the 'Questions and answers' interface for 'AE01-000571'. A 'Cutoff date and time' field is highlighted with a red box, showing '6/29/2024 12:00:00 am'. Below this, there is a list of 'Unanswered questions'. One question is highlighted with a red box and a green cursor: 'The requested receipt date can i ch'. The question received timestamp is '6/26/2024 8:28:14 AM'.

9. Then go back to the bidding page and click **'Submit'**.

14. If you don't have the item and want to suggest an alternate item, then click on the **"Add alternate"** button. A new alternate line will be added.
15. Enter the **Product name**, **Unit price**, **Item description** and **Item specification** for the suggested alternate item and click **'Submit'** on the action pane.

Finance and Operations | Procurement and sourcing > Requests for quotations > All requests for quotations

Request for quotation bid | AE01-RFQ-000000392 : FLOORWORLD LLC | Standard view

**Material process**  
Delivery and payment terms

Lines

Product name	Item number	Quantity	Unit	Unit price	Net amount	Comment	Alternate	Alternate item description	Alternate item specification	Start d
PQ & Energy Analyzer	EPC00001	5.00	SERVICE	0.000	0.000		No			
Analyzer	EPC00001	5.00	SERVICE	0.000	0.000		Yes			

Line details

IDENTIFICATION	REQUESTED AMOUNTS	REPLY AMOUNTS	REQUESTED DETAILS	REPLY DETAILS	LEAD TIME
Product name	Unit	Unit	Vendor's item number	Vendor's item number	Lead time

16. To check if any document is attached by the client for reference or for any other requirement, click 'RFQ attachment'.

Finance and Operations | Vendor collaboration > Requests for quotations > Request for quotation bid

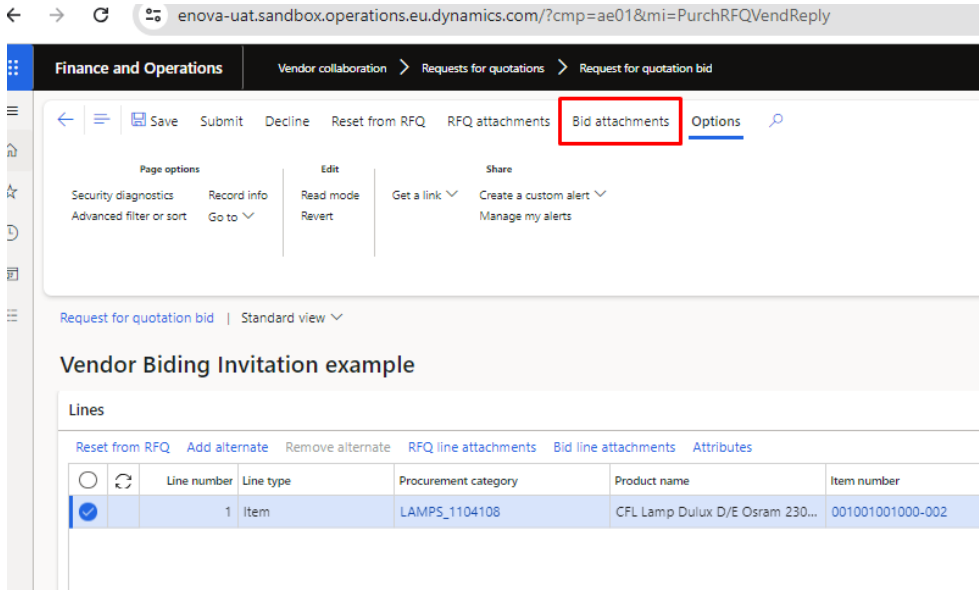
Request for quotation bid | Standard view

**Vendor Biding Invitation example**

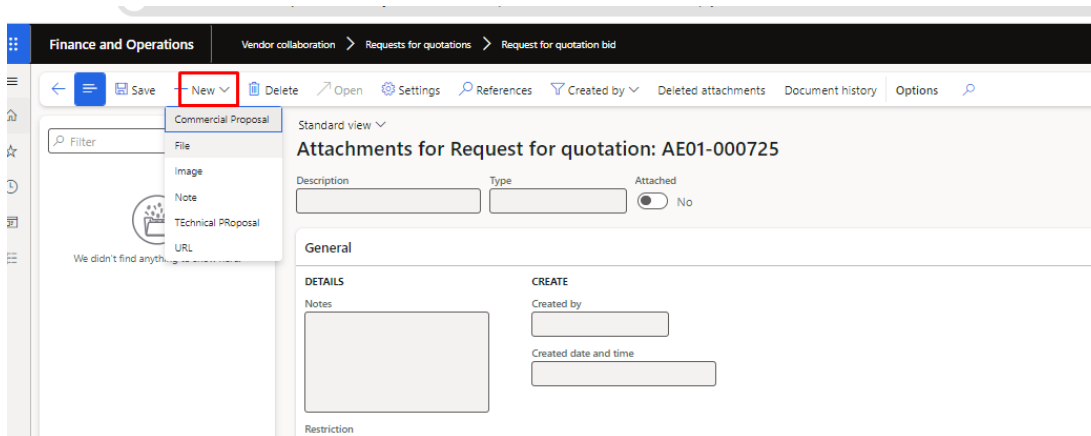
Lines

Line number	Line type	Procurement category	Product name	Item number
1	Item	LAMPS_1104108	CFL Lamp Dulux D/E Osram 230...	001001001000-002

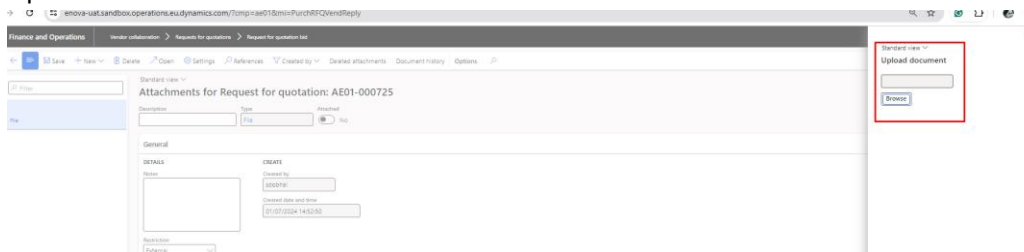
17. Now do the 'Bid attachment' which is required by the client for Technical or Commercial proposal.



18. Click 'New' to attach any file you want to give to the client or required by the client.



19. Upload the document



20. Click Save and Back symbol.

21. Now go back and check under 'Delivery and Payment terms' and 'Line details'. Marked in 'RED' is requested by Enova and marked in 'GREEN' which you can propose to Enova if you want to change any.

Line number	Line type	Procurement category	Product name	Item number	Quantity	Unit	Unit price	Unit price con...	Net amount	Line amount c...	Comment	Alternate
1	Item	LAMPS_1104108	CFL Lamp Dulux D/E Osram 230...	001001001000-002	1.00	EACH	500.000	500.000	500.000	500.000	test	No

22. Check the expiration date before submitting just for your reference.

Operation completed

Request for quotation bid | Standard view

### Vendor Bidding Invitation example

**General**

Request for quotation AE01-000725	Request for quotation case AE01-000606	Delivery name ENOVA FACILITIES MANAGEME...	Address 2nd floor City Centre Offices Port Saeed Dubai ARE	Bid type Open	Currency AED
Document title Vendor Biding Invitation example	Requestor Surabhi Dobhal Joshi	Delivery address ENOVA FACILITIES MANAGEME...	Solicitation type Open	Requested receipt date 01/07/2024	Bid submitter Surabhi Dobhal Joshi
Status Submitted: No action required	Requesting department			Expiration date and time 14/07/2024 20:00:00	Submission date and time 01/07/2024 15:23

23. Click 'Submit'.

enova-dat.sandbox.operations.ed.dynamics.com/?cmp=ae01&cm=Purchase+Vendor+Reply

Finance and Operations | Vendor collaboration > Requests for quotations > Request for quotation bid

Save **Submit** Decline Reset from RFQ RFQ attachments Bid attachments Options

Page options: Go to, Edit (Read mode, Revert), Share (Get a link)

Request for quotation bid | AE01-000727 : SD | Standard view

### Vendor Bidding Invitation example

REQUESTED PAYMENT      REQUESTED DELIVERY      REPLY DELIVERY      REPLY VALIDITY

24. One Popup will come that will tell you that you can submit the bid until the expiration date, you can click yes or no accordingly. You can recall or make any changes only before expiration date.

Finance and Operations | Vendor collaboration > Requests for quotations > Request for quotation bid

Save Submit Decline Reset from RFQ RFQ attachments Bid attachments Options

Page options: Go to, Edit (Read mode, Revert), Share (Get a link)

Request for quotation bid | AE01-000727 : SD | Standard view

### Vendor Bidding Invitation example

Bidding guidance items

Amendments

Enova

Questionnaire

Delivery and payment terms

REQUESTED PAYMENT Terms of payment	REQUESTED DELIVERY Requested receipt date 07/01/2024	REPLY DELIVERY Requested receipt date 07/01/2024	REPLY VALIDITY Reply effective date
REPLY PAYMENT	Delivery terms	Delivery terms	Reply expiration date

Do you want to submit your bid? Until the expiration date, you can use the Recall action to update the bid that you submit. Click Yes to submit the bid.

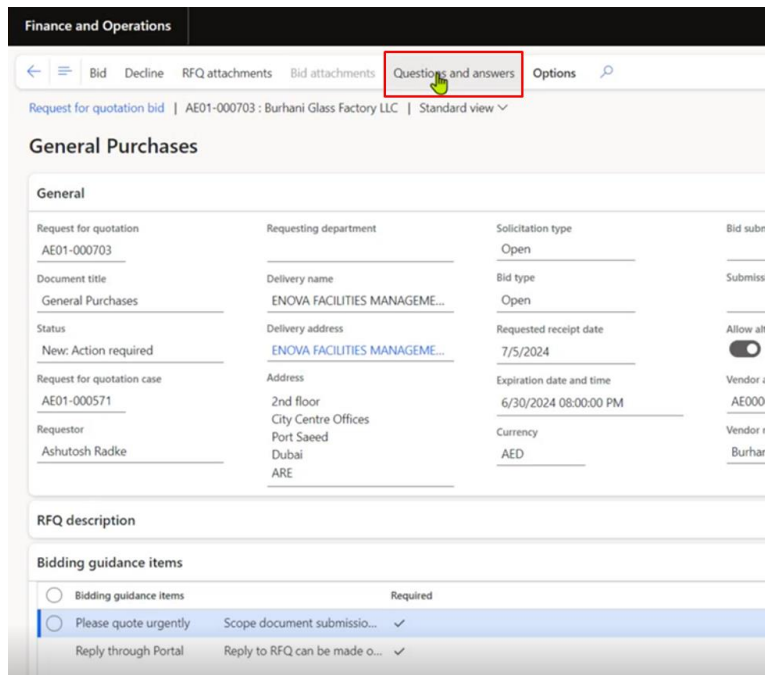
Yes No

25. Once the bids are submitted, purchaser can accept or reject the alternate item suggestion given by you.

- Depending on the price and number of days you've defined, customer may negotiate and request you to submit your bidding again or reduce the 'Lead time' (Number of days to deliver the material/service).

### 3.2 Submit Queries/Clarifications to Tenders

- If you have any question to be asked from your client then you can click on the top 'Questions and answers'.



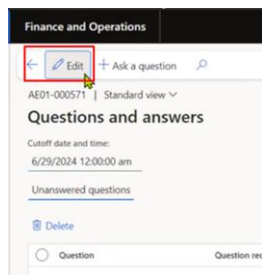
The screenshot shows the 'Finance and Operations' portal interface. The navigation bar at the top includes 'Bid', 'Decline', 'RFQ attachments', 'Bid attachments', 'Questions and answers' (highlighted with a red box and a mouse cursor), and 'Options'. Below the navigation bar, the page title is 'Request for quotation bid | AE01-000703 : Burhani Glass Factory LLC | Standard view'. The main content area is titled 'General Purchases' and contains a 'General' section with a table of details:

General	Requesting department	Solicitation type	Bid submit
Request for quotation AE01-000703		Open	
Document title General Purchases	Delivery name ENOVA FACILITIES MANAGEME...	Bid type Open	Submission
Status New: Action required	Delivery address ENOVA FACILITIES MANAGEME...	Requested receipt date 7/5/2024	Allow alter <input checked="" type="checkbox"/>
Request for quotation case AE01-000571	Address 2nd floor City Centre Offices Port Saeed Dubai ARE	Expiration date and time 6/30/2024 08:00:00 PM	Vendor ac AE00001
Requestor Ashutosh Radke		Currency AED	Vendor na Burhani

Below the table, there is an 'RFQ description' section and a 'Bidding guidance items' section with a table of items:

Bidding guidance items	Required
<input type="radio"/> Bidding guidance items	Required
<input checked="" type="radio"/> Please quote urgently	Scope document submissio... ✓
<input type="radio"/> Reply through Portal	Reply to RFQ can be made o... ✓

- Click 'Edit' and it will give an option to click 'Ask a question' then type your question and click 'Submit'.

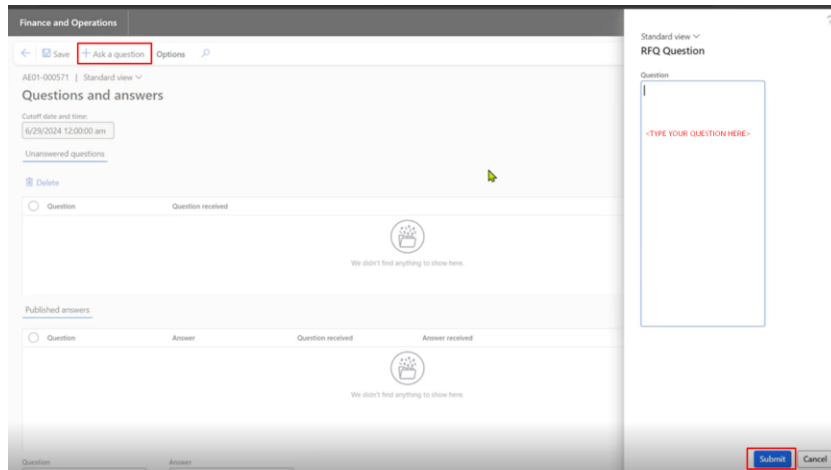


The screenshot shows the 'Finance and Operations' portal interface. The navigation bar at the top includes 'Bid', 'Decline', 'RFQ attachments', 'Bid attachments', 'Questions and answers' (highlighted with a red box and a mouse cursor), and 'Options'. Below the navigation bar, the page title is 'Request for quotation bid | AE01-000571 | Standard view'. The main content area is titled 'Questions and answers' and contains a 'Cutoff date and time' section with a table of details:

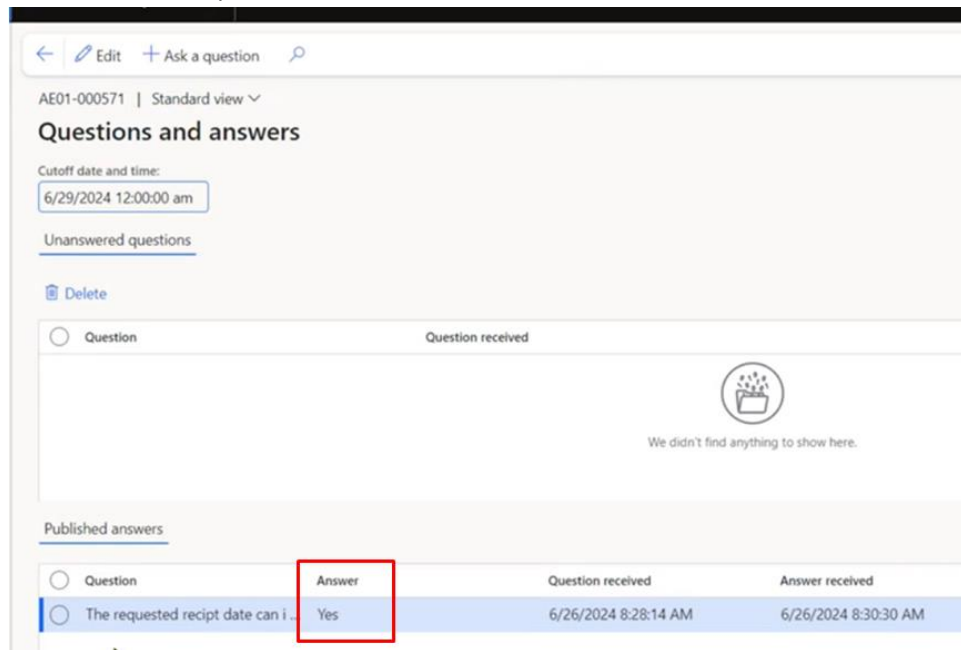
Cutoff date and time:
6/29/2024 12:00:00 am

Below the table, there is an 'Unanswered questions' section with a 'Delete' button and a 'Question' section with a 'Question rec' button.





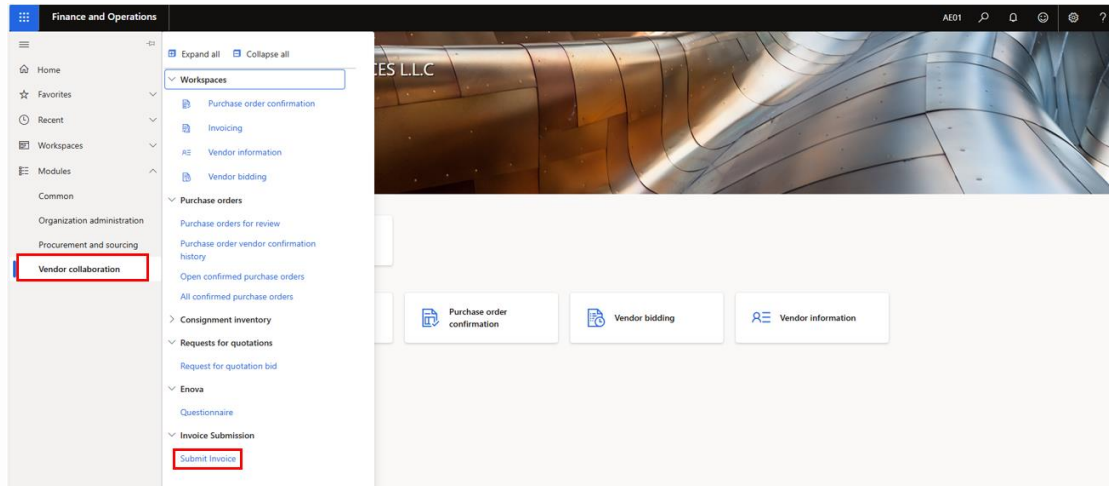
- Once submitted, Enova will review and answer that question. Which you can review under same tab 'question and answer'.



## 4 Managing Invoicing

This is to submit the invoices, advance invoice, credit note, Retention Claim invoice thru Dynamics 365 application.

- Go to **Vendor collaboration > Invoice Submission > Submit Invoice**.



2. You can see in your portal, whatever Invoices or advance invoice has been submitted with status.

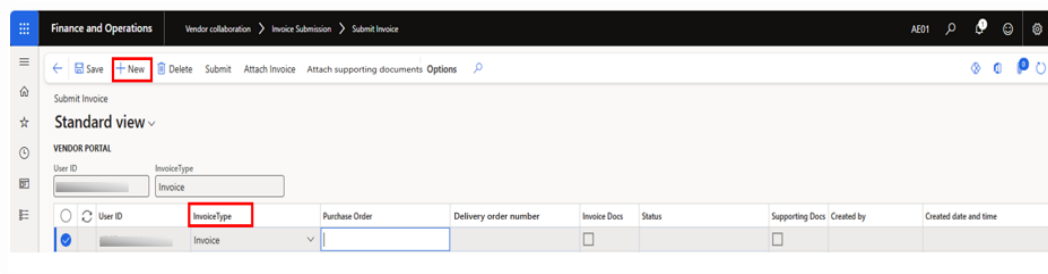
Submit Invoice

Standard view ▾

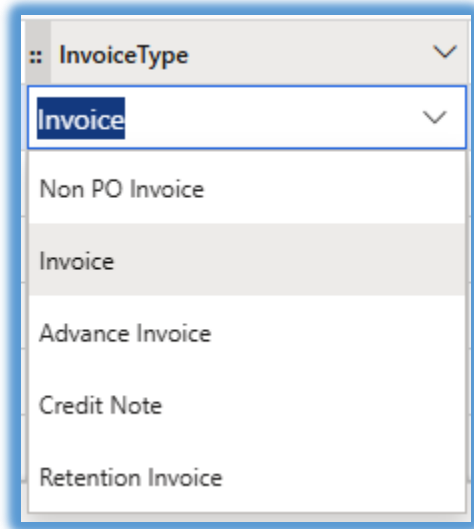
VENDOR PORTAL

User ID	InvoiceType	Invoice	InvoiceType	Purchase Order	Delivery order num	Invoice Docs	Status	Support
	Invoice		Invoice	POC104553	23-3038	✓	Sent to ERP	✓
	Invoice		Invoice	POC104553		✓	Need To Review	✓
	Invoice		Invoice	POG58513	UBC-SI7UQ4020561050	✓	Document Rejected	✓
	Invoice		Invoice	POG58513	UBC-SI7UQ4020561050	✓	Document Rejected	✓
	Invoice		Invoice	POG58513	UBC-SI7UQ4020561050	✓	Sent to ERP	✓

3. To Submit the new Invoice, click 'NEW'.



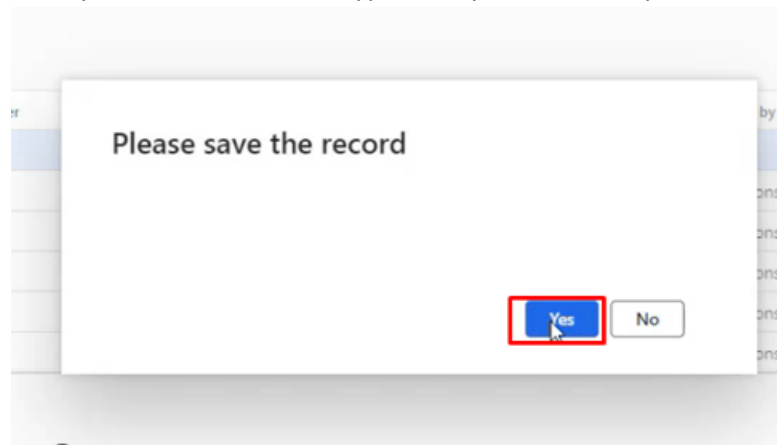
4. Once clicked 'New', one new record line will be created.
5. Select the 'Invoice Type' based on the type of document you want to submit.



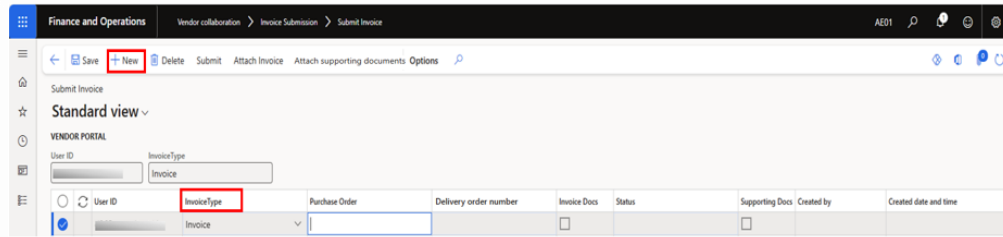
6. The Invoice Type dropdown offers several options for users to select, based on the type of invoice being submitted:
- i. Invoice (Purchase Order Invoice)
  - ii. Advance Invoice
  - iii. Credit Note
  - iv. Retention
  - v. Non-PO Invoice.

Note: Please ensure that the user selects the correct invoice type when uploading an invoice. Failure to do so may lead to invoice rejection.

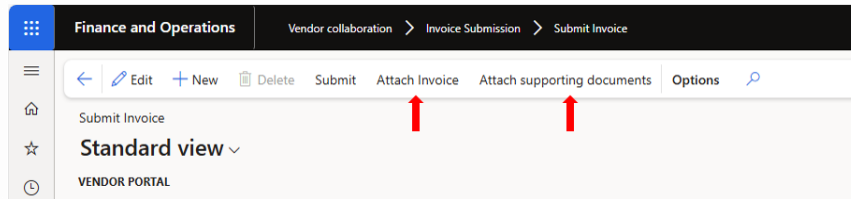
7. Once you select the Invoice type, the system will ask you to save the record.

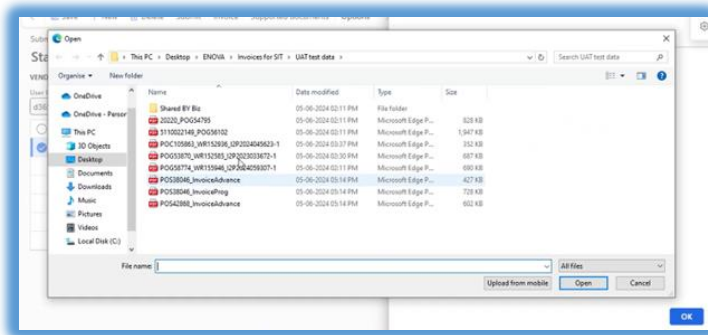
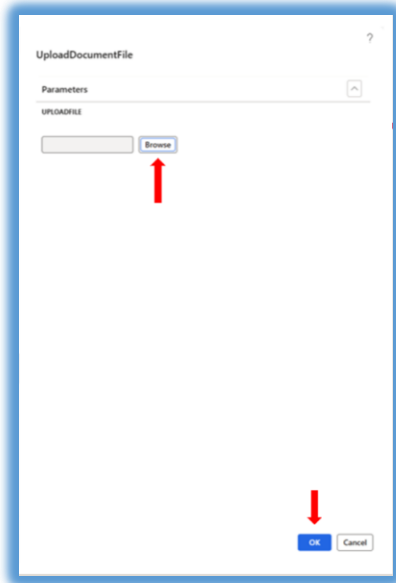


8. Enter 'Purchase Order' for which you want to submit the invoice.

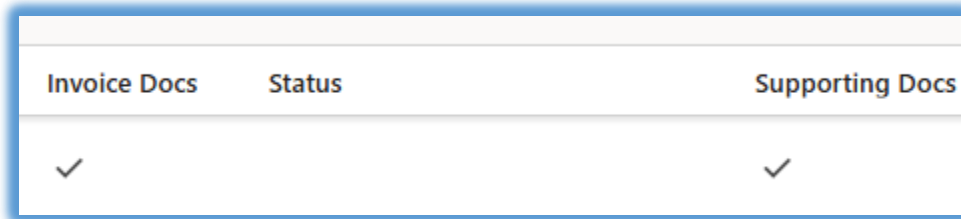


9. To attach the documents of Invoice and supporting documents, click 'Attach Invoice' and 'Attach supporting documents' button respectively.

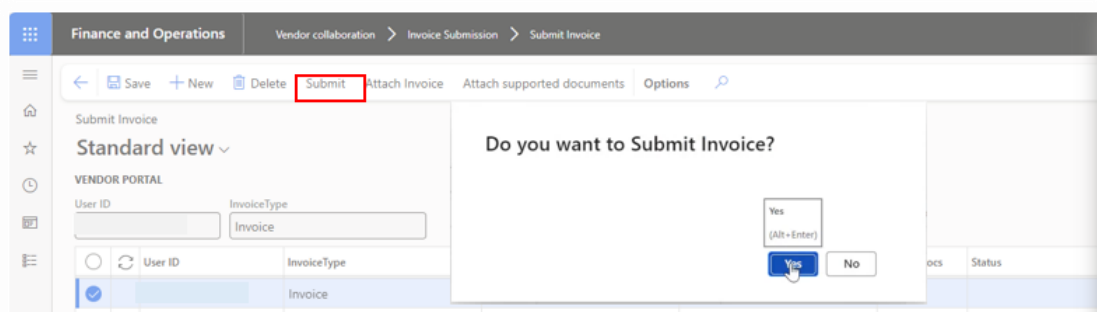




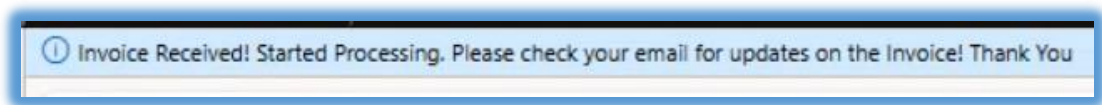
10. Once the documents are attached, you can see that check boxes enabled.



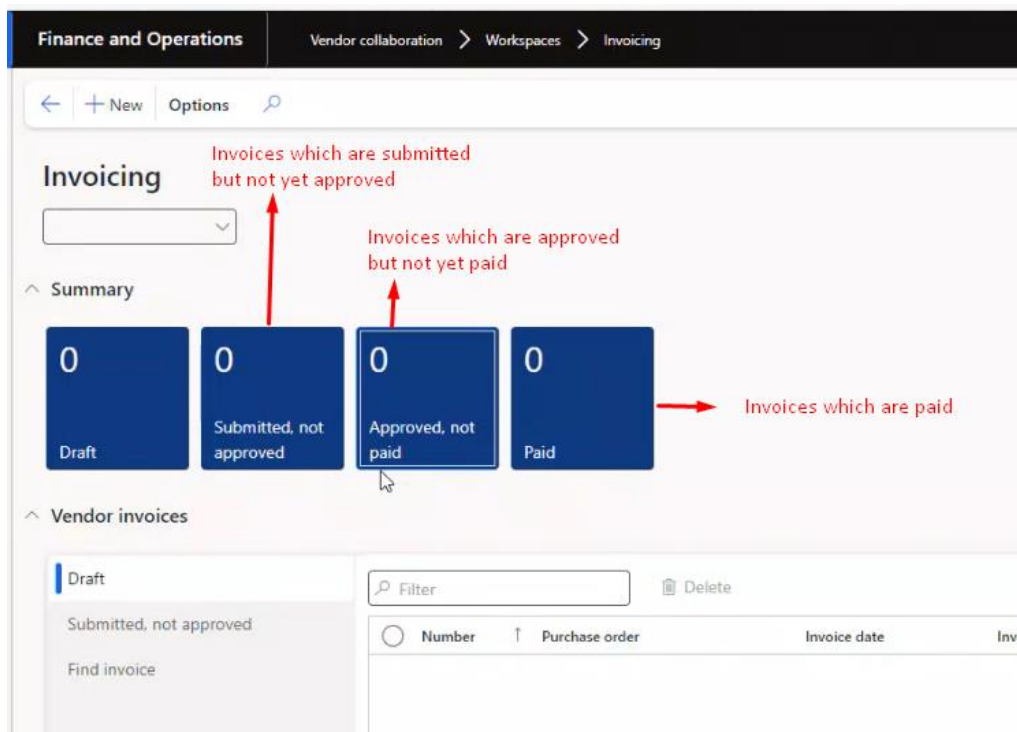
11. Once all documents attached then click 'Save' and 'Submit' and click 'Yes'.



12. Once submitted the user will see a notification saying “Invoice Received! Started Processing. Please check your email for updates on the Invoice! Thank you”.



13. The users will also get email notifications once the invoice has been processed successfully or if it is rejected.
14. Once submitted, in parallel our Finance Team will receive the notification for the invoices you’ve attached. Finance will verify all the attachments and perform the 3-way matching with PO, GRN (service receipt) and Invoice.
15. To check the status of approval of your invoice, go to **Vendor collaboration > Workspaces > Invoicing**.
16. You’ll have a complete view of your submitted invoice’s status like which are all invoices which are submitted and not approved, which are all invoices are approved, which are all paid.



17. Once you click any of the above tile, you can see the list of invoices based on the status.
18. Alternatively, the vendor will be able to check the status of the invoices that they submitted through the vendor portal. There are different statuses like:
  - i. Need to Review: The invoice detected with issues/errors needs to be reviewed by Enova AP team.
  - ii. Approval Pending: The invoice is in the process of approval by the Enova AP team.
  - iii. Sent to ERP: The invoice has been approved and sent to ERP.

- iv. Document Rejected: Invoice is rejected due to a mismatch or any other issues.
- v. Posted In ERP: The invoice has been successfully posted in ERP.

Submit Invoice

Standard view ∨

VENDOR PORTAL

User ID InvoiceType

Invoice		InvoiceType	Purchase Order	Delivery order num	Invoice Docs	Status	Support
	Invoice		POC104553	23-3038	✓	Sent to ERP	✓
	Invoice		POC104553		✓	Need To Review	✓
	Invoice		POG58513	UBC-SI7UQ4020561050	✓	Document Rejected	✓
	Invoice		POG58513	UBC-SI7UQ4020561050	✓	Document Rejected	✓
	Invoice		POG58513	UBC-SI7UQ4020561050	✓	Sent to ERP	✓

## 5 Help & Support

If you face any technical issues or have any queries (related to vendor management, Tender participation, Purchase Orders, Invoice Management etc.) please reach out to [vendor@enova-me.com](mailto:vendor@enova-me.com).