USING THE SUBCONTRACTOR PORTAL

End User’s Navigation Guide – PO Assignments and Vendor Invoicing

Subcontractors using the portal will need to adhere with the company’s reporting practices established in Unanet. Subcontractors, with the Unanet role of Purchase Order Assigner, can assign time and expense users to labor and expense detail lines associated with an open Purchase Order (PO). These assignments allow the VI User role to create Vendor Invoices in the portal from a PO with matched project transactions.

# Subcontractor Portal - Purchase Orders (PO)

**Navigate: Portal > Dashboard > Purchase Orders (left side menu)**

The Purchase Orders screen provides access to see the list of Purchase Orders created in Unanet for a given Vendor Organization and any Assignments made for labor and expense users.

# Create PO Assignments in Subcontractor Portal

**Navigate: Portal > Dashboard > Purchase Orders (left side menu) > Select specific PO**

To Add a Purchase Order Assignment, Select the PO row to open the DETAILS tab. From the PO DETAILS tab, Click the Assign icon on the PO line to create a PO Assignment. The ASSIGN USERS pop up window is displayed:

* Select People and Date range
* Click +ADD to preview Assignment (use “x” to remove if necessary)
* Check box to Notify Project Manager and Resource Assigner that PO assignments are ready for review
* SAVE CHANGES and confirm the user is now included on the ASSIGNMENTS tab

# Subcontractor Portal - Vendor Invoice

**Navigate: Portal > Dashboard > Vendor Invoice (left side menu)**

The Subcontractor Portal Vendor Invoice (VI) screen allows the role of the VI User to view, edit, add, delete, and submit Vendor Invoices for a given Vendor that matches the VI User’s Person Organization. Once an invoice is paid, by Accounts Payable in Unanet, the Amount Paid will be included with the invoice listed.

# Create Vendor Invoice IN SUBCONTRACTOR PORTAL

**Navigate: Portal > Dashboard > Vendor Invoice (left side menu) > +Add Invoice**

Vendor Invoices are only able to be generated in the Subcontractor Portal by selecting a Purchase Order that has matched labor or expense transactions. To create a Vendor Invoice, from the Vendor Invoices list, Press +Add Invoice. The ADD INVOICE popup window will be displayed to include a list of Vendor’s Purchase Orders with any amounts for the Labor (timesheets) and Expenses (expense reports) with dates on or before the current day.

* Select one or more available PO lines
* Press the Generate Invoices button
* Invoice date (document/post dates in Unanet) will default to the current date

VI Users can Submit an invoice with an INUSE status and select an Accounts Payable Approval Group. Once the Vendor Invoice is SUBMITTED in the Subcontractor Portal, Unanet Users can review, approve, edit, and post the resulting Vendor Invoice via the standard Accounts Payable Vendor Invoice functionality within Unanet.