



# Vendor Portal User Manual

April 2024

# Table of Contents

WELCOME TO THE VENDOR PORTAL.....	1
<b>A Portal Just For You.....</b>	<b>1</b>
<b>Portal Users.....</b>	<b>1</b>
<b>How Do I Sign Up?.....</b>	<b>1</b>
I. New Vendor registration.....	2
II. Existing Vendor registration.....	9
<b>Using the Vendor Portal.....</b>	<b>9</b>
I. Purchase Orders and Purchase Agreements.....	10
II. Submit an Invoice Through the Vendor Portal.....	13
III. Maintain Vendor Information in Portal.....	18
IV. General Navigation and User Preferences.....	31
<b>Portal Security and Privacy.....</b>	<b>41</b>

# Welcome to the Vendor Portal

## A Portal Just For You

VPRA's system for financial transactions is Dynamics 365. We create and track budgets, requisitions, purchase orders, invoices, and payments in Dynamics. Now, our vendors can also access Dynamics to view and print purchase orders, to submit invoices, and to track approval and payment of invoices.

This Manual will provide you with instructions for setting up your vendor portal account, onboarding users, how to submit invoices, how to view and print purchase orders, how to track VPRA's review and payment of invoices, and how to set up alerts. You will also learn how to create contacts and addresses, and to upload insurance certifications and banking information. We will also provide helpful hints on how to customize your screen and views.

## Portal Users

Before you jump into registering for the Vendor Portal, let's talk about who might want to use the Portal. There are three security roles for vendor portal users. These roles control what your users can see and do:

- Role 1: Maintain vendor contact persons and vendor user requests
- Role 2: View and print purchase orders and purchase agreements in the vendor portal
- Role 3: Maintain invoices in the vendor portal

You need to have one, and only one, Primary User. The Primary User should be the individual who submits invoices on behalf of your company. This person should have all three of these security roles. For the most part, your other users will be provided only Role 2, the View and print POs role. Depending on your internal process, you may also choose to provide more than one person with the ability to maintain (i.e., submit) invoices. You likely want to limit only one or two users to Role 1. More on Portal Users later.

User Role	Purpose
1. Maintains vendor contact persons and vendor user requests	Allows a vendor user to provide access to their portal to other vendor staff members
2. View and print purchase orders and purchase agreements in the vendor portal	View-only access
3. Maintain invoices in the vendor portal	Allows a vendor user to submit invoices and to monitor status of payment

## How Do I Sign Up?

Some of you are brand new to VPRA, and some of you have been doing business with VPRA. If you are new, you will follow the Instructions just below. If you are already doing business with VPRA, your Vendor portal account already exists. Your instructions will be a little different. Jump to Section II Existing Vendor Registration.





**Important:** The person who submits the New Vendor Registration request must be the individual who will submit invoices. This person will also be the one and only Primary User for your Vendor Portal account.

## I. NEW VENDOR REGISTRATION

To get started, click this link, or copy and paste it into your web browser:

[Vendor Portal - VPRA \(vapassengerrailauthority.org\)](https://vapassengerrailauthority.org)

You have been directed to the VPRA website. Find and click the link that says, “**Vendor Form.**” A Registration Form will open. Follow the steps below to initiate the registration process. Remember, the person identified should be your Primary User.

**Step 1:** Within VPRA's vendor portal registration request, enter the following details:

- **Company Name:** Your legal name, not doing business as name
- **First Name**
- **Last Name**
- **Title**
- **Email Address**
- **Phone Number**
- **Business justification** – Enter “**New Vendor**” or “**Existing Vendor.**”

**Test Vendor Portal**  
To capture the Vendor information and it to the Vendor Portal in Dynamics.

\* Required

1. Company Name \*  
WSP USA Inc.

2. First Name \*  
Michael

3. Last Name \*  
Hopkins

4. Title \*  
Accounting Director

5. Email Address \*  
Michael.Hopkins@wspusa.com

**Step 2:** Click **Submit** to send the request to the VPRa Purchasing team for review.

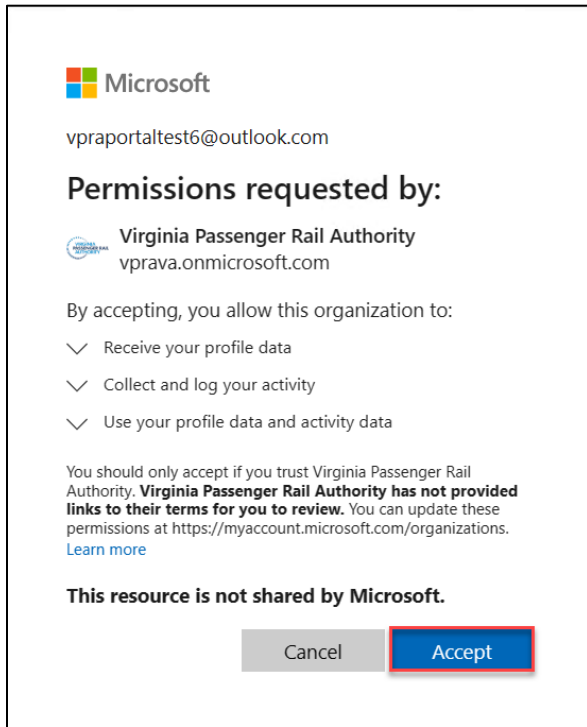


**Important:** The details entered on the VPRa registration form will be passed to Dynamics. VPRa's Procurement team will receive a notification, telling us to review the request. Please allow five (5) business days for VPRa to process your request.

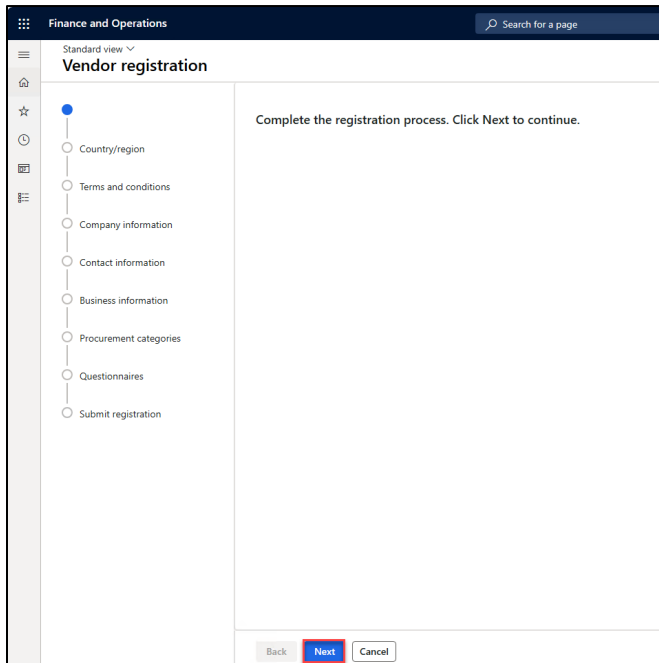
**Step 3:** You will receive an email to the email address you provided on the Registration request form after VPRa has reviewed and approved your request.

When you receive the email, click **Accept Invitation**.

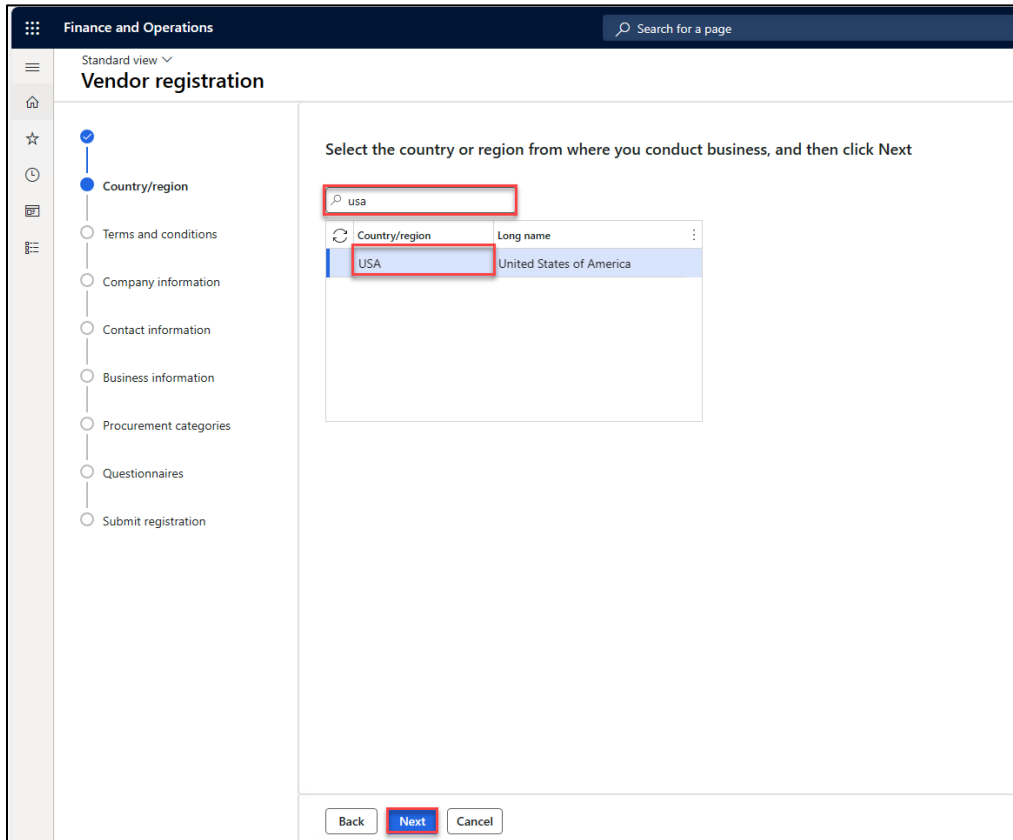
**Step 4: Accept** the request for permissions to proceed with the registration process.



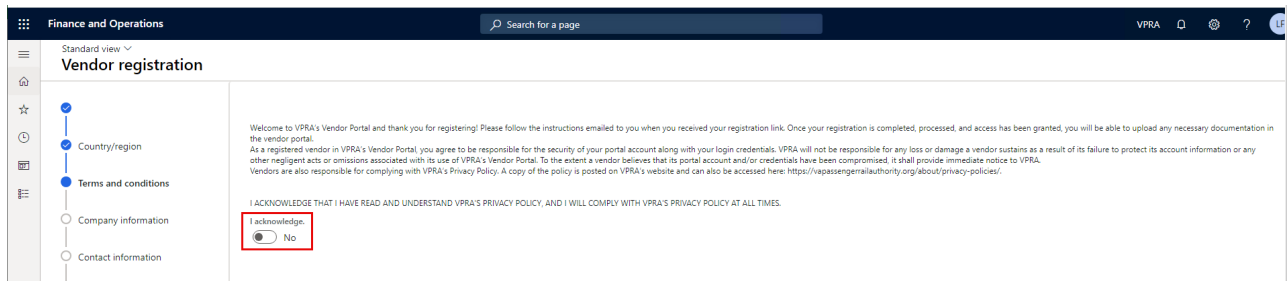
**Step 5:** Dynamics 365 will be launched to begin the registration process. Select **Next**.



**Step 6:** Select **USA** within the **Country/region** list, and then click **Next**. Note that the search bar can be used to filter results.



**Step 7:** Review the general text and acknowledge that it has been read and understood by toggling from No to **Yes**. Click **Next**.



**Step 8:** Enter general company and contact information as applicable. To add an address, use the **Add** button. To modify an existing address, use the **Edit** button. Once finished, click **Next**. This is where the **main office address** and **remit to address** should be entered.

**Note:** This screen is for general company contact information. The next step provides instructions for contact information for the individual who is registering for the vendor portal and other key vendor contacts.

The screenshot shows the 'Vendor registration' form in the 'Finance and Operations' system. The left sidebar lists various steps, with 'Company information' selected. The main form area is divided into two sections:

- GENERAL INFORMATION:** Contains input fields for Name (Jacobs Engineering), Doing business as (JE LLC), Organization type (Organization), Telephone (804-628-1791), Fax, Email (CThomas@wspportaltesting.com), and Website (JacobsEngineeringPortalTest.com).
- ADDRESS INFORMATION:** Includes '+ Add' and 'Edit' buttons. Below is a table with one entry:
 

Name or description	Address	Purpose	Primary
Jacobs Engineering	500 W. Cary St Richmond, VA 23219 USA	Business	Yes

At the bottom of the form are 'Back', 'Next', and 'Cancel' buttons.

**Step 9:** Enter your personal contact information and address details. Click **Next**.

The screenshot shows the 'Vendor registration' form with 'Contact information' selected in the sidebar. The main form area is divided into two sections:

- GENERAL INFORMATION:** Contains input fields for First name (Charles), Middle name, Last name (Jacobs), Email (VPRAPortalTest6@outlook.com), and Telephone (804-628-1554).
- ADDRESS INFORMATION:** Includes '+ Add' and 'Edit' buttons. Below is a table with one entry:
 

Name or description	Address	Purpose	Primary
Charles Jacobs	500 W. Cary St Suite 210 Richmond, VA 23219 USA	Business	Yes

At the bottom of the form are 'Back', 'Next', and 'Cancel' buttons.



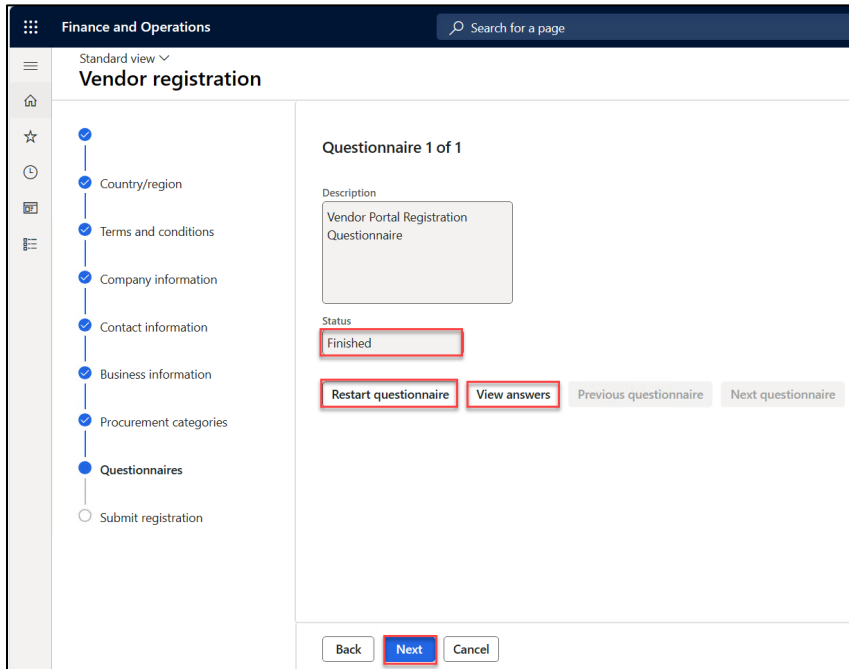
**Step 10:** Make appropriate selections within the **Ownership Profile**, **Business Profile** and **Terms of Payment** sections. Click **Next**. Continue with the selections in **Procurement categories**.

The screenshot shows the 'Vendor registration' form in the 'Finance and Operations' system. The form is divided into three main sections: **OWNERSHIP PROFILE**, **BUSINESS PROFILE**, and **TERMS OF PAYMENT**. The **OWNERSHIP PROFILE** section includes checkboxes for 'Minority owned', 'Woman owner', 'Small business', and 'Locally owned'. The **BUSINESS PROFILE** section includes fields for 'Number of employees', 'Tax exempt number', 'Federal tax ID type', 'Federal tax ID', 'Name to use on the 1099', '1099 box', 'State tax ID', and 'Tax state'. The **TERMS OF PAYMENT** section includes fields for 'Currency' and 'Terms of payment'. The 'Next' button is highlighted in red.

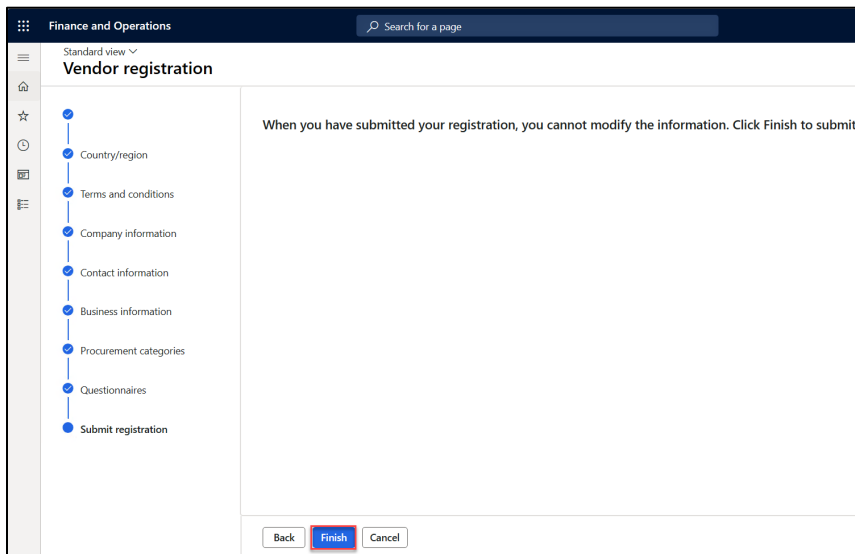
**Step 11:** Select **Complete questionnaire**. Enter a response for each question, and then use the **Forward** button to advance to the next question. After responding to the final question, click **End**.

The screenshot shows the 'Vendor registration' form in the 'Finance and Operations' system, specifically the 'Questionnaire 1 of 1' section. The 'Complete questionnaire' button is highlighted in red.

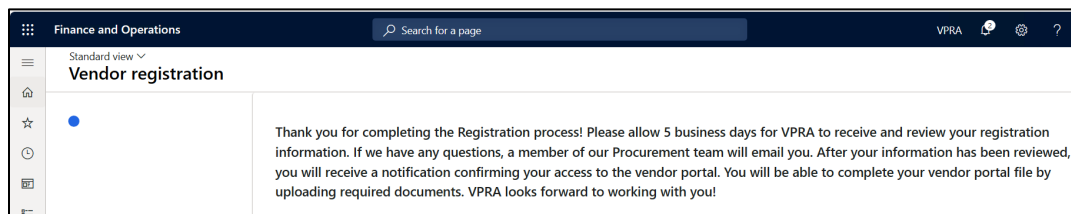
**Step 12:** Use the **Restart questionnaire** or **View answers** options, as needed. Once complete, the questionnaire **Status** will show as **Finished**. Click **Next**.





**Step 13:** When ready, click **Finish** to submit the registration request to VPRA for processing.



**Step 14:** A confirmation message will appear. VPRA's Procurement department will review the request within five business days and contact you with next steps.



 **Important:** Please allow 5 business days for VPRA to receive and review your registration information. If we have questions, we will email you. Once your information is reviewed and approved, your vendor portal account will be created. You will receive an email from VPRA Procurement. You will then be able to upload relevant documents, such as small business certification, certificates of insurance, banking details, and the like.

 **Important:** Your login credentials are your work email address and your work email address password. This is true for each user; i.e., each user will log in using their own work email address and the associated password to the email address.

**Step 15.** You will receive an email from VPRA confirming creation of your vendor portal account. We will provide an Electronic Funds Transfer form for you to complete so we can confirm your banking account information. You will also need to upload other relevant documents, such as a copy of your W9, evidence of small business certifications, if applicable, and certificates of insurance. Go to Using the **Vendor Portal > Uploading Documents** below.

VPRA will put your account on hold until the remaining information is uploaded. Once received, your account will become active.

## II. EXISTING VENDOR REGISTRATION

If you are an existing vendor, VPRA has already created a vendor portal file for you. Now, we just need to provide you with access. As an existing vendor, you can initiate your access to the vendor portal in one of two ways. You can use the link provided in Section 1, Step 1. When you complete the registration initiation form, select **Existing Vendor**. The other way to obtain access to your vendor portal is by invitation from VPRA. VPRA will send you an email inviting you to register to access your existing vendor portal account.

### Using the Vendor Portal

Congratulations! Now, you have access to your Vendor Portal account. In this section, we will teach you how to do the following:

- View and print purchase orders and purchase agreements
- Submit invoices and track review and payment
- Add users
- Upload documents
- Maintain information stored in your Vendor Portal
- Set alerts

## I. PURCHASE ORDERS AND PURCHASE AGREEMENTS

Before we get started, let's make sure we understand the function of a VPRA purchase order (PO) and the function of a VPRA Purchase Agreement (PA).

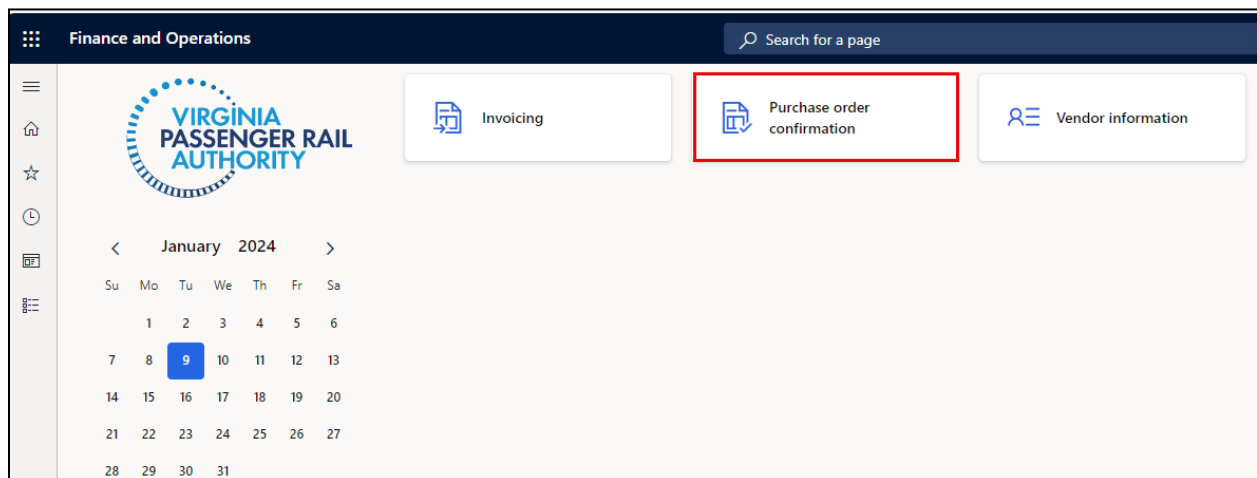
**Purchase Orders:** VPRA issues POs to confirm what we are purchasing, the quantity, and the cost. POs are also used to track project budgets and current project spend. For each open PO you have with VPRA, you should submit one corresponding invoice. For fastest review, approval, and payment, your invoice should reflect the VPRA PO number. VPRA often adds attachments to POs at the PO line level; for example, change orders, task orders, emails authorizing an expense, etc.

**Purchase Agreements:** PAs are a tool in Dynamics to track certain types of contracts. Not every contract is a PA. For clarity, a "Purchase Agreement" is a Dynamics 365-specific term. Do not panic if you have a written contract or agreement with VPRA, but don't have a PA in Dynamics.

VPRA uses Dynamics 365 PAs to track budgets for certain types of contracts: bench contracts and multi-year contracts that include Annual Work Plans (AWPs). For example, every firm on a bench contract has a fully executed contract. Each firm on a bench contract will be issued separate task orders for each task they perform for VPRA. To track and connect task order spend, VPRA creates a PA for the fully executed contract. Then, each time a task order is issued, VPRA issues one PO for the task order. Similarly, if your firm has an AWP with VPRA, VPRA creates a PA in Dynamics for the fully executed contract, and then issues an annual PO (or multiple POs) for the AWP, reflecting the total allowed spend for that fiscal year.

## Vendor Portal Homepage

Your homepage will look similar to the image below:



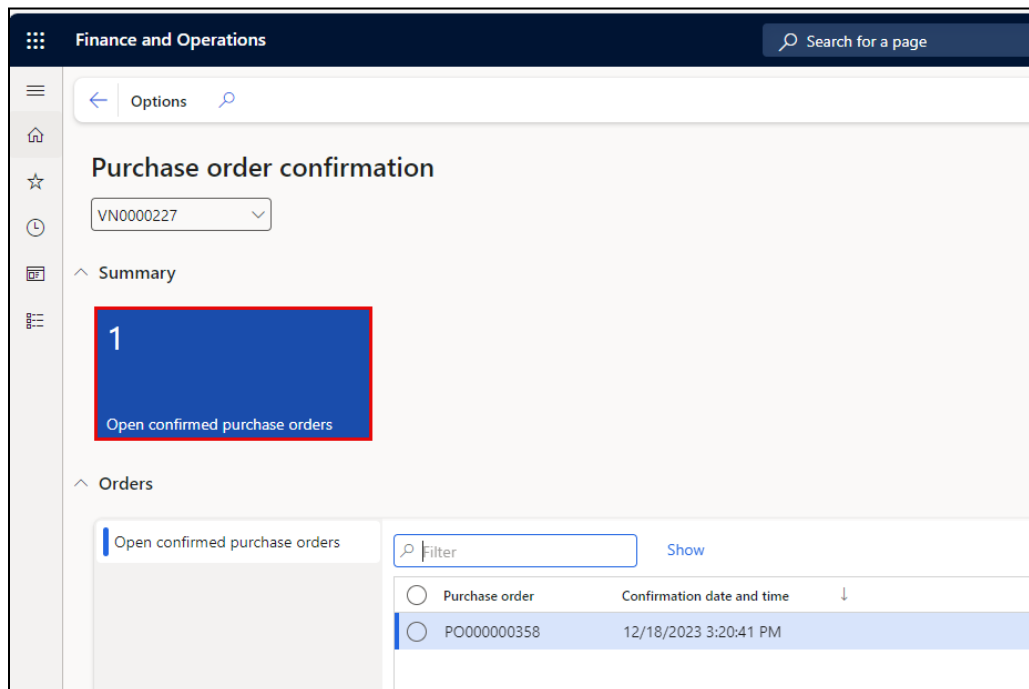
You will see tiles in your main workspace that provide shortcuts to your main portal views. For more on navigation within your portal, please see **the section below**.

## View and Print POs

**Access Menu Path:** Dynamics home page > Purchase order confirmation workspace

**Step 1:** Select the **Purchase order confirmation** workspace tile.

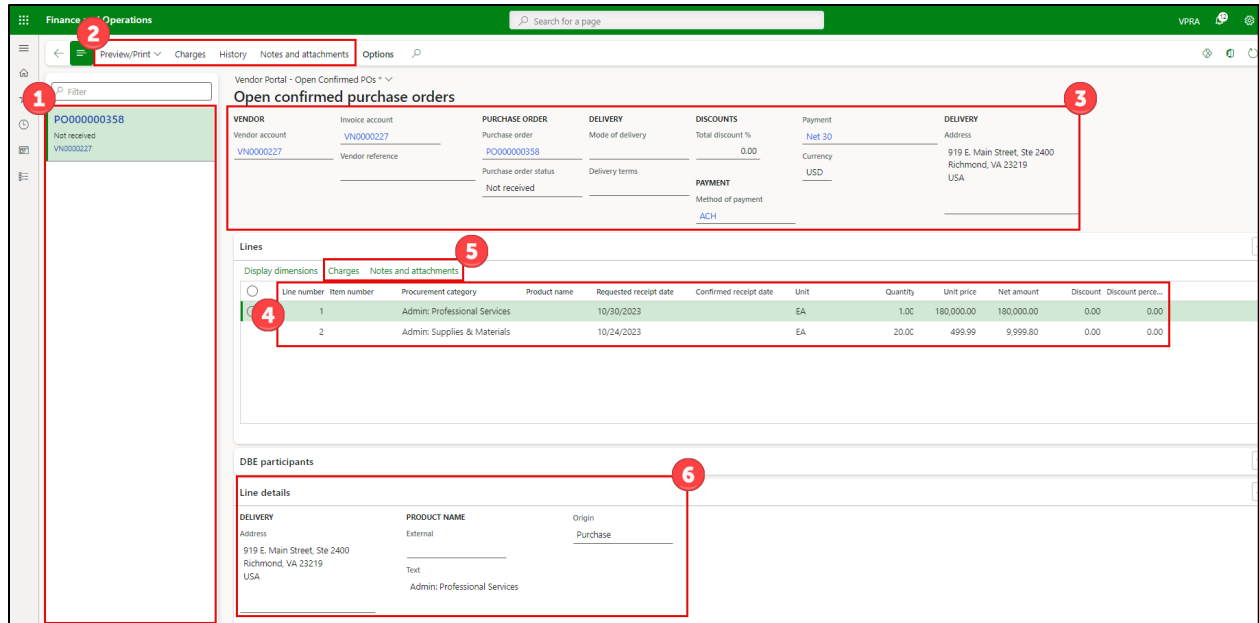
**Step 2:** Select the **Open confirmed purchase orders** tile.



**Step 3:** You will see a page of all open, confirmed purchase orders. This section focuses on open purchase orders, meaning the PO has not yet been delivered to VPRA, invoices are still expected, or both. From this list, you can do the following:

1. Select a specific PO in the left pane.
2. Click **Preview/Print** in the top ribbon to generate a copy of the PO, view header level **Charges**, and review **Notes and Attachments** that the VPRA Procurement team has added.
  - a. **Note:** If reviewing header level **Notes and attachments**, select the applicable note or attachment in the left pane of the subsequent screen, and then click **Open** to download a copy.
3. Review header level information for the selected PO.
4. Review line level information for the selected PO.
5. Review line level **Charges**, as well as **Notes and attachments**.
 

**Note:** If reviewing line level **Notes and attachments**, select the applicable note or attachment in the left pane of the subsequent screen, then click **Open** to download a copy.
6. Review **Line details** based on the line selected in section 4 above.

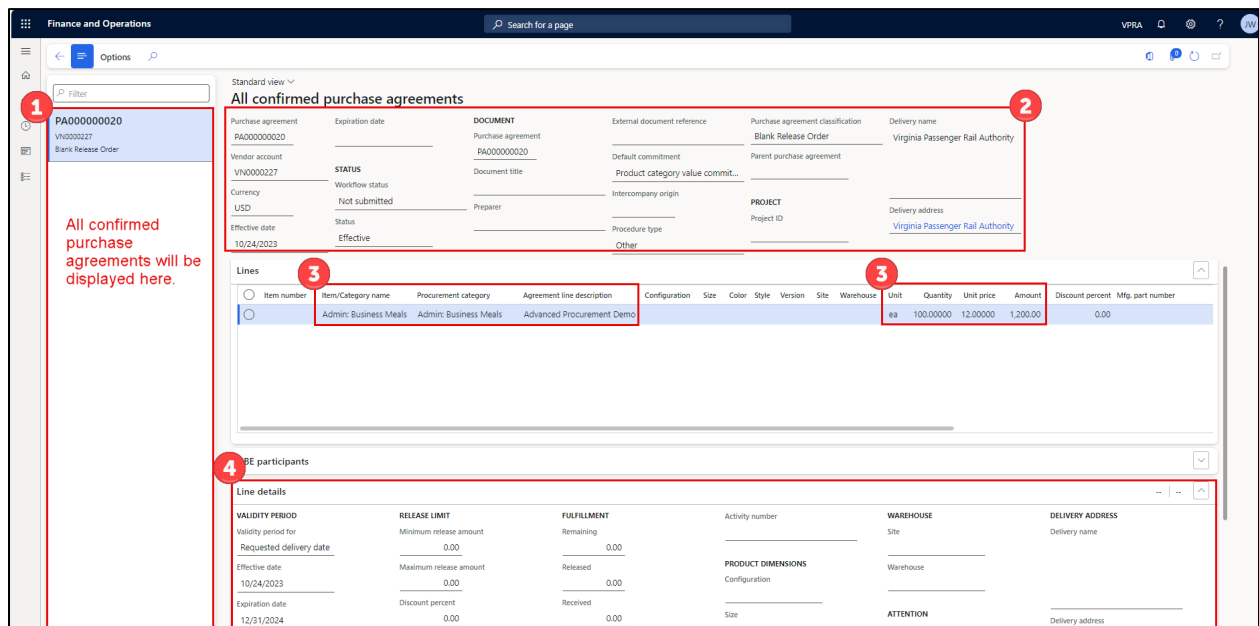


## View and Print PAs

**Access Menu Path:** Modules > Vendor Collaboration > Purchase Agreements > All Confirmed Purchase Agreements

**Step 1:** A page of all PAs will generate. Within this page, you can do the following:

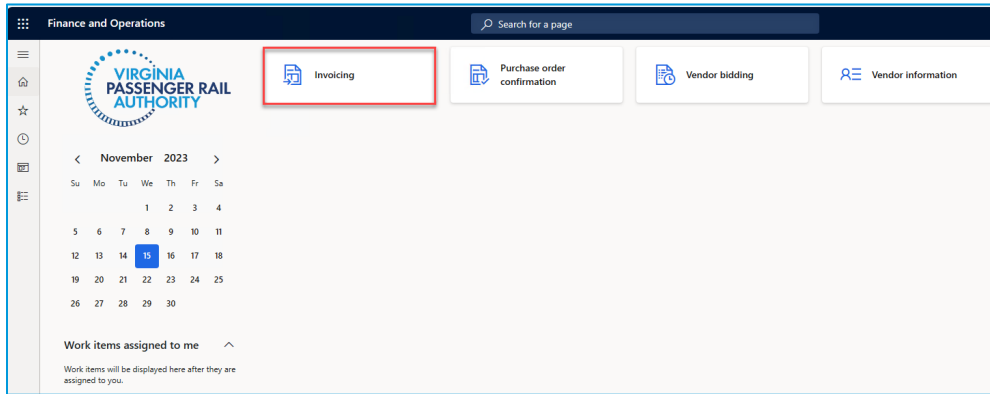
1. Select the specific PA in the left pane.
2. Review header level information.
3. Review line level information.
4. Review additional details based on the specific line selected.



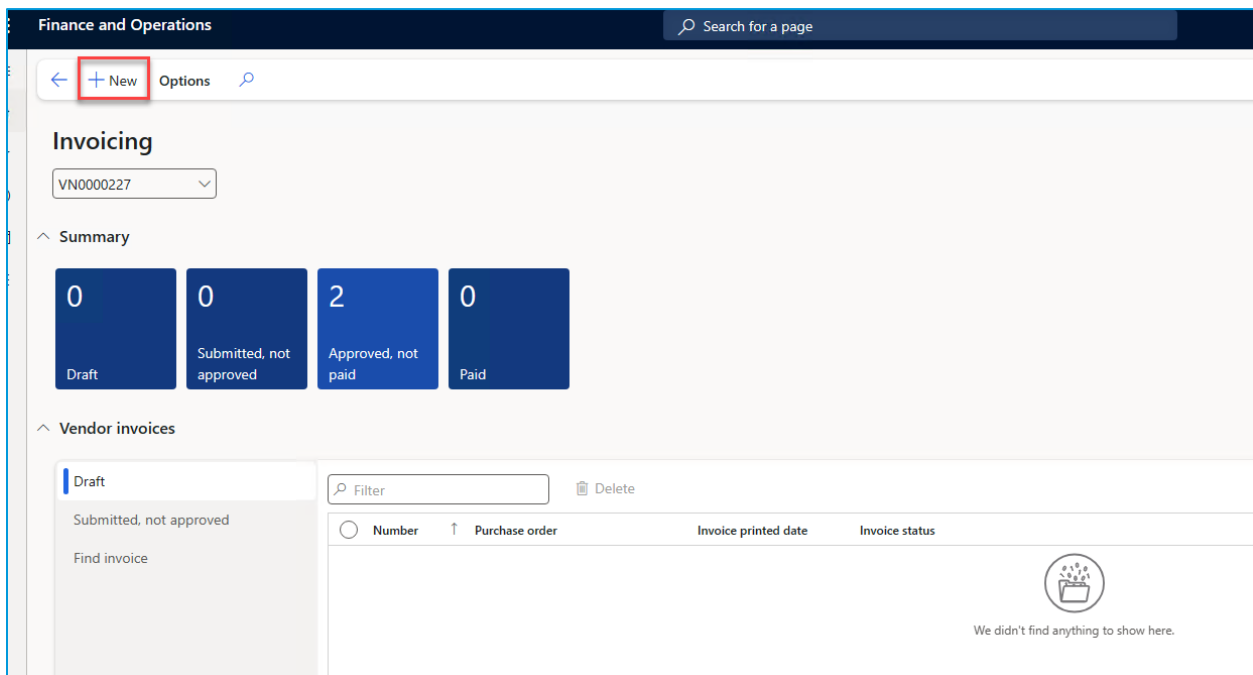
## II. SUBMIT AN INVOICE THROUGH THE VENDOR PORTAL

**Access Menu Path:** Home > Invoicing workspace

**Step 1:** From the Dynamics 365 home page, select the **Invoicing** workspace.



**Step 2:** Within the **Invoicing** workspace, select **New**. A pop-up window appears.



**Step 3:** Enter the following information, then click **Create invoice**:

- **Purchase order**
- **Invoice number**
- **Invoice printed date**
- **Invoice description**

Standard view ▼ ?

### Create new invoice

Purchase order

Invoice number

Invoice printed date

Invoice description

**Step 4:** Within the **Vendor invoice**, enter a **Quantity** and **Unit price**. Note that the remaining balance of the line will be automatically displayed.

Finance and Operations Search for a page VPRA

Personalize Page options Share

Always open for editing Security diagnostics Record info Create a custom alert  
 Personalize this page Advanced filter or sort Go to Manage my alerts

Vendor invoice | 9987987: WSP, Inc. | Vendor Portal Invoicing View ▼

### 9987987

Lines Header

Vendor invoice header 9987987 | USD | 2/24/2024

INVOICE IDENTIFICATION	Purchase order	DATES	APPROVAL	Invoice account	Remittance location
Number 9987987	PO00000358	Invoice printed date 1/25/2024	Workflow status Draft	VN0000227	WSP, Inc.
Invoice description Portal Invoice Test	Currency USD	Due date 2/24/2024	VENDOR Description WSP, Inc.		Address 600 Main St. West Palm Beach, FL 33412 USA
	Has notes and attachments <input checked="" type="radio"/> No				

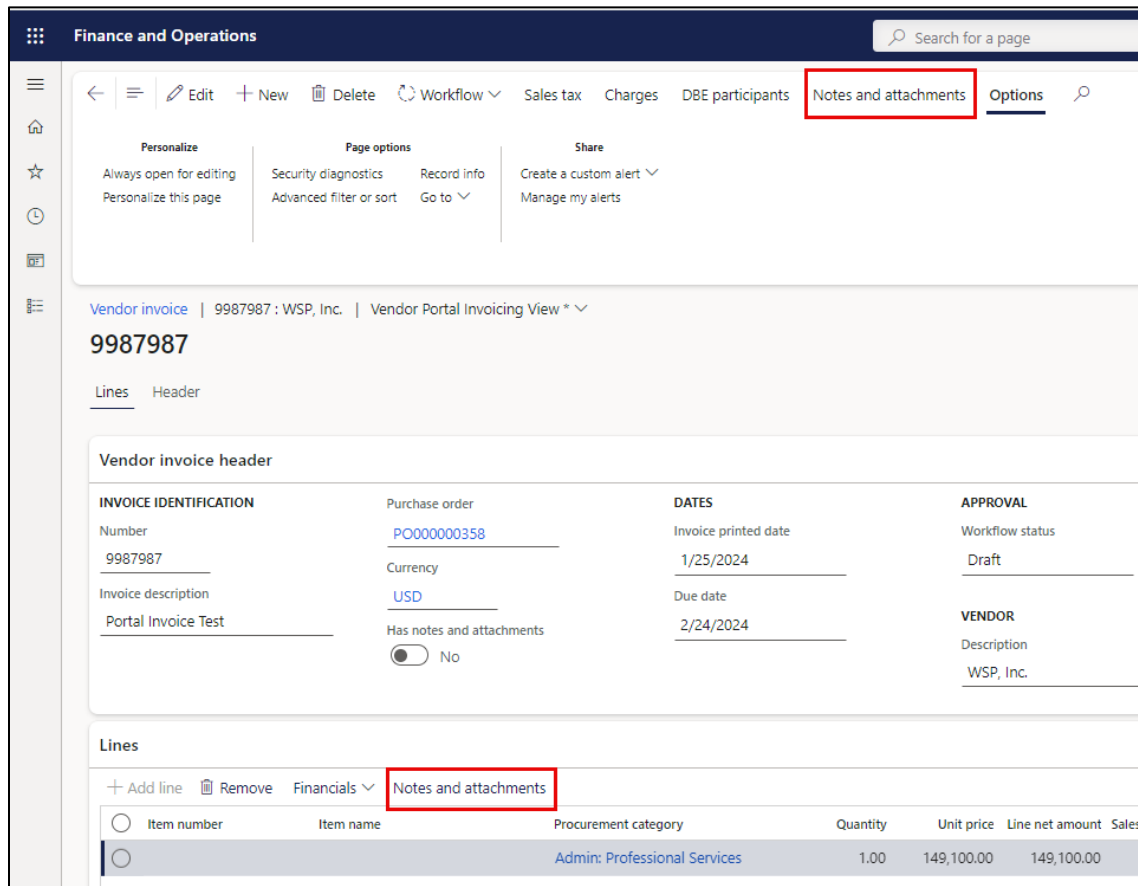
Lines

+ Add line Remove Financials Notes and attachments

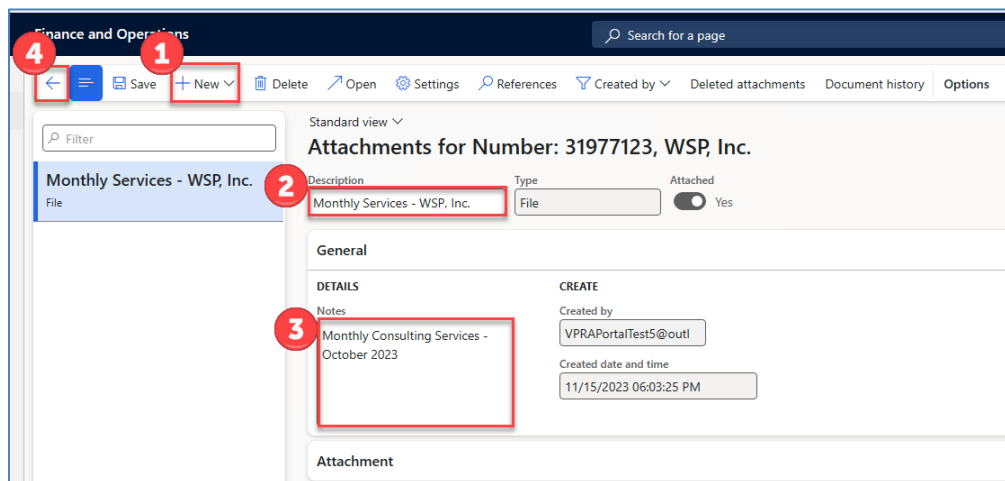
Item number	Item name	Procurement category	Quantity	Unit price	Line net amount	Sales tax group	Item sales tax group	Has notes and attachments
		Admin: Professional Services	1.00	149,100.00	149,100.00			



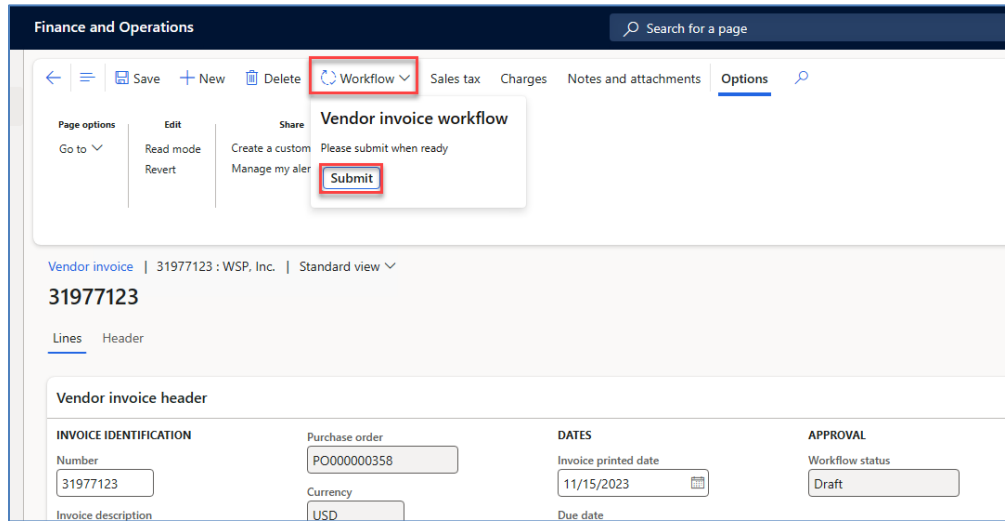
**Step 5:** Attach a copy of the invoice and any other supporting documentation by selecting the header or line level **Notes and attachments**.



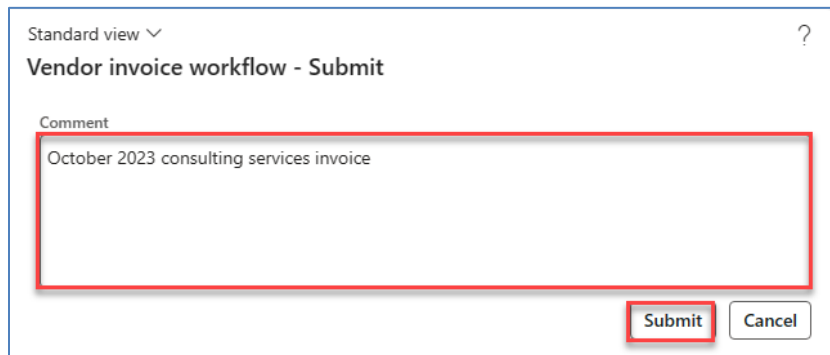
**Step 6:** Select the **New** dropdown, and then select an attachment type. Enter a **Description** and **Notes** to describe the content of the document. Click **Save**, and then click the **back arrow** to return to the invoice.



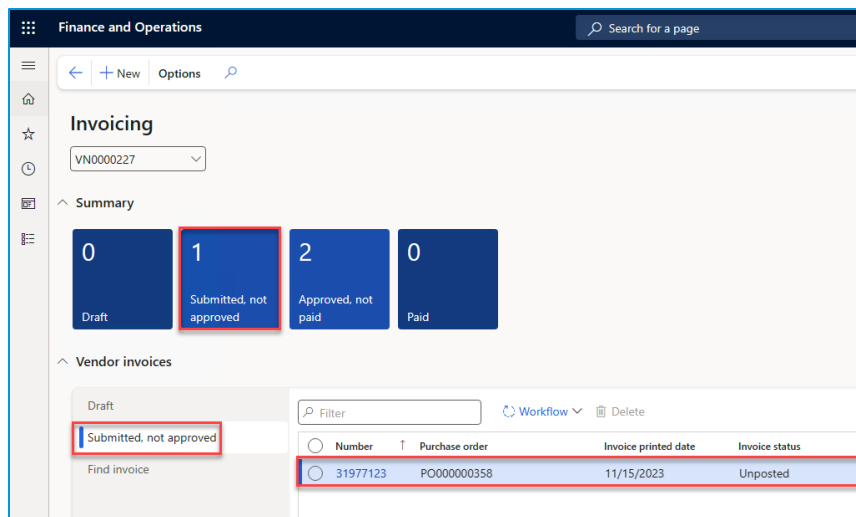
**Step 7:** When ready to submit the invoice to VPRA's Accounts Payable department, select the **Workflow** dropdown, and then **Submit**.



**Step 8:** You may enter a **Comment**, and then click **Submit** for VPRA processing.



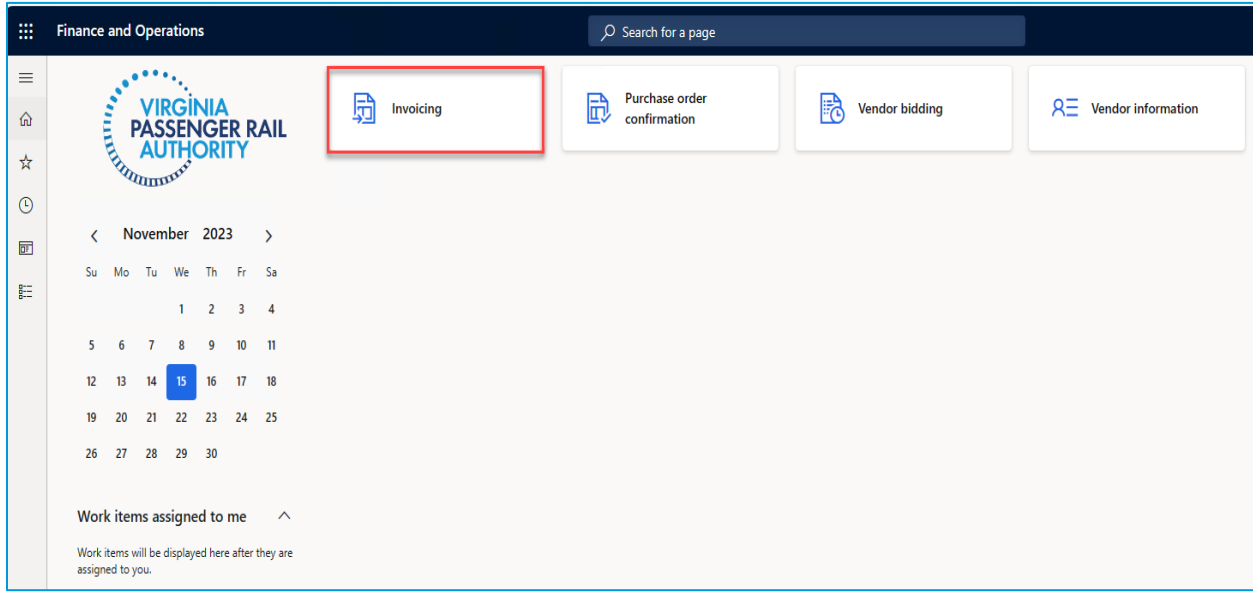
**Step 9:** The invoice will be visible within the **Submitted, not approved** file on your workspace. To review the detailed invoice, select the invoice **Number** hyperlink.



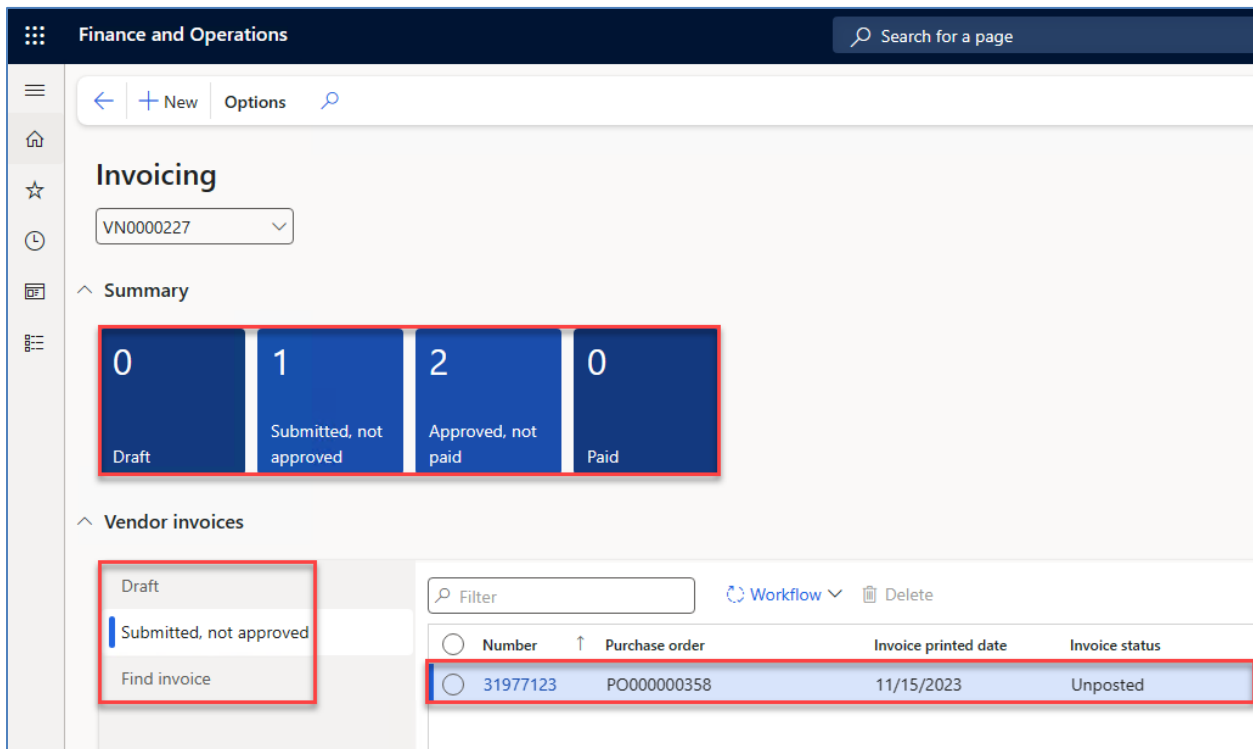
# Check the Status of a Pending Invoice

**Access Menu Path:** Home > Invoicing workspace

**Step 1:** Select the **Invoicing** tile in the Dynamics workspace.



**Step 2:** Use the tiles and tabs to review the status of invoices submitted to VPRA. The **invoice Number** hyperlink in the middle of the screen can be clicked to open the detailed view of the invoice. Notice that the **Summary** tiles tell you where the invoice is in the VPRA process.



<b>Draft</b>	Invoices that have been created, but not yet submitted to VPRA for processing.
<b>Submitted, not approved</b>	Invoices that have been submitted to VPRA for processing but are pending review by the Accounts Payable department.
<b>Approved, not paid</b>	Invoices that have been submitted to and approved by VPRA. A payment has not yet been issued for these invoices.
<b>Paid</b>	Invoices that have been submitted to, approved, and paid by VPRA.

Notice **Vendor Invoices** allows you to sort your invoices based on their status.

<b>Draft</b>	Invoices that have been created, but not yet submitted to VPRA for processing.
<b>Submitted, not approved</b>	Invoices that have been submitted to VPRA but are pending review by VPRA.
<b>Find Invoice</b>	Search for invoices in any status.



**Important:** If you have any questions or issues when submitting invoices, please contact VPRA Accounts Payable department at [accountspayable@vpra.virginia.gov](mailto:accountspayable@vpra.virginia.gov) or 804-546-1012.

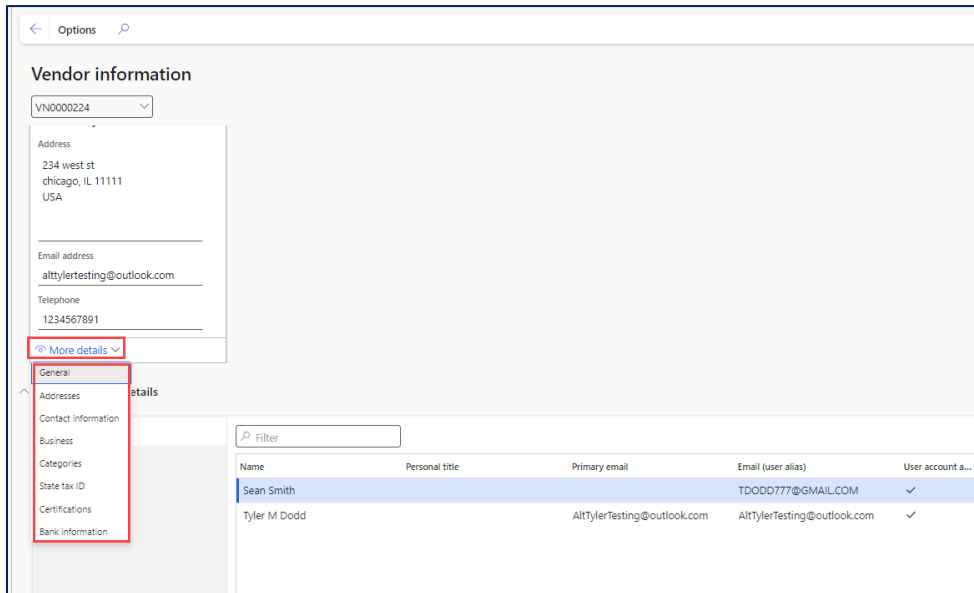
### III. MAINTAIN VENDOR INFORMATION IN PORTAL

Your vendor workspace provides a dashboard to view and maintain basic company and contact information. Depending on the level of access you have as a vendor user, you will either be able to view information, maintain/revise information, make requests to provision new users, modify existing users, or inactivate users from your portal.

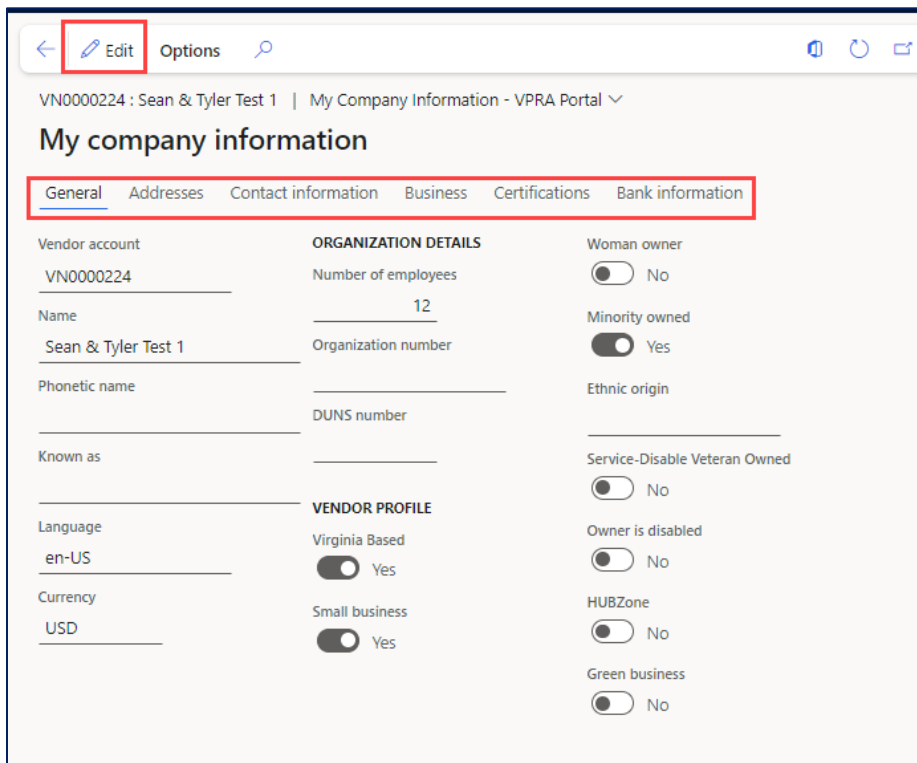
**Access Menu Path:** Modules > Vendor collaboration > Workspaces > Vendor information -OR- click the Vendor information tile

The screenshot displays the Virginia Passenger Rail Authority portal dashboard. At the top, there is a navigation bar with the text "Finance and Operations" and a search bar labeled "Search for a page". Below the navigation bar, the dashboard is divided into several sections. On the left, there is a sidebar with a menu icon and a calendar for March 2024. The calendar shows the date 14th highlighted. In the center, there is a section titled "APPS" with a tile for "Business performance analytics (preview)". Below this, there is a section titled "WORKSPACES" with three tiles: "Invoicing", "Purchase order confirmation", and "Vendor information". The "Vendor information" tile is highlighted with a blue border. At the bottom of the dashboard, there is a section titled "Work items assigned to me" with a sub-note: "Work items will be displayed here after they are assigned to you."

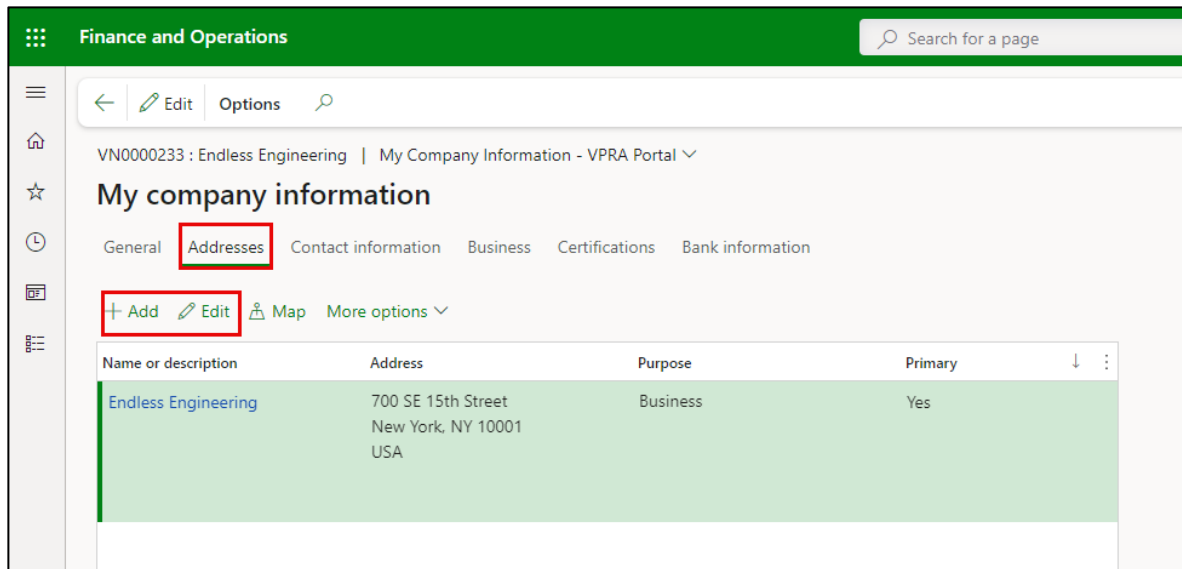
**Step 1:** Within the **Vendor information** workspace, you can find your Vendor account number on the top left-hand side of the form. Click the **More details** dropdown and select an option to view and/or edit your company's basic information. We selected **General**.



**Step 2:** The **My company information** page will open. Review the information in each tab for accuracy and completeness. Select **Edit** from the ribbon at the top to make changes. Note, some of the fields across each tab may be non-editable. If changes to non-editable fields are needed, you will need to request that your Portal primary user make the change, or contact VPRA to make the change. See Step 15 below.

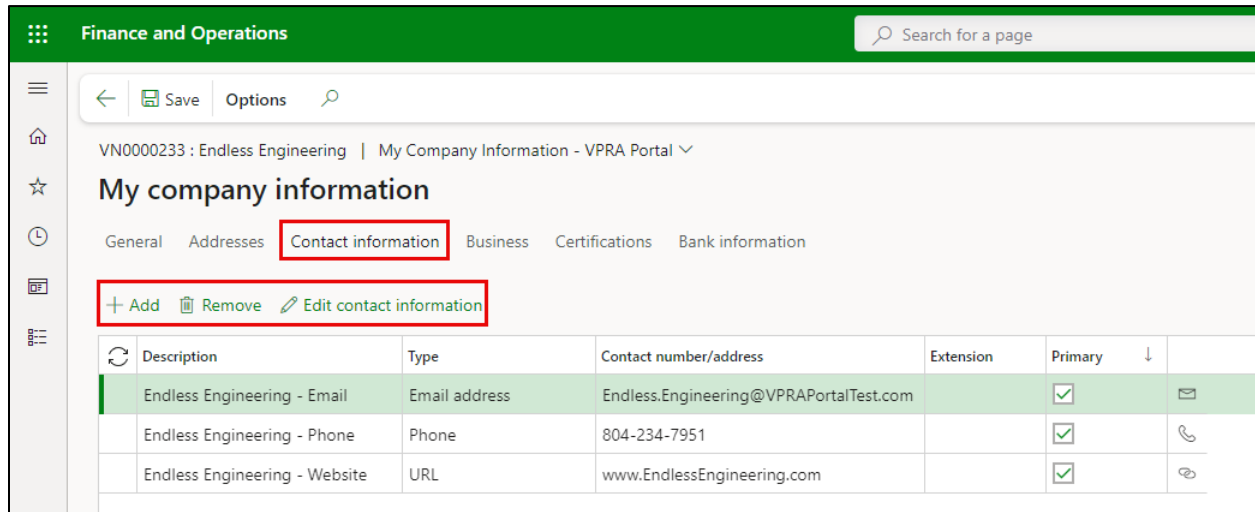


**Step 3:** Click the **Addresses** tab. View the information or click **Add** to create new addresses. Select **Edit** to edit existing address information.

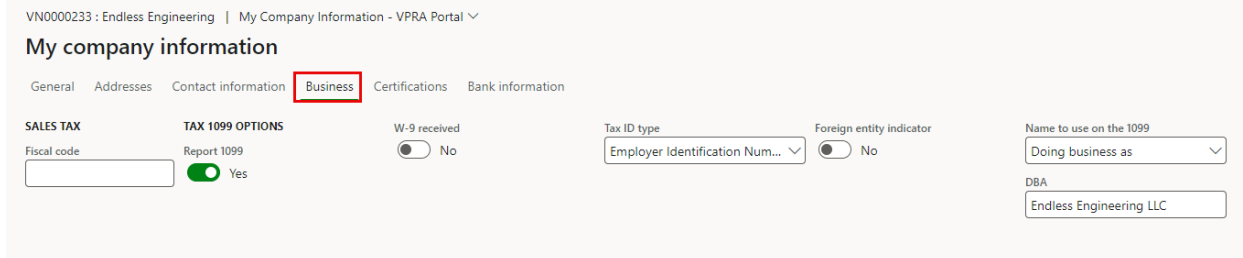


If creating a new address, populate the **Name or description**, **Purpose**, **Street**, and **ZIP/postal code** fields. Dynamics will automatically populate the related **Country/region**, **City**, **State** and **County**. If this will be your company's new primary address, toggle **Primary** to "Yes". Once finished, click **OK** and then click **Save**.

**Step 4:** Click the **Contact information** tab. Use the **Add, Remove** and **Edit contact information** buttons to add, remove, or edit company contact information. Please note that access to these buttons and their related functionality will be driven by user security roles.

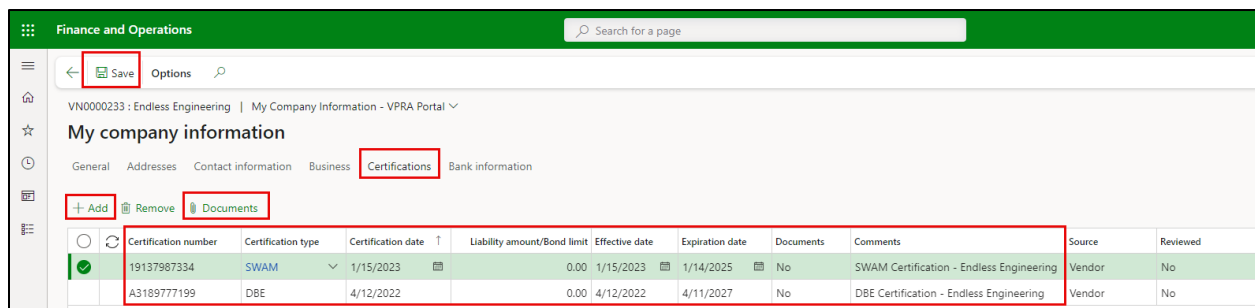


**Step 5:** Click the **Business** tab to view tax 1099 reporting information. Here, you can view or update the **Report 1099, W-9 received, Federal tax ID, Tax ID type, Foreign entity indicator, Name to use on the 1099,** and **DBA** fields.

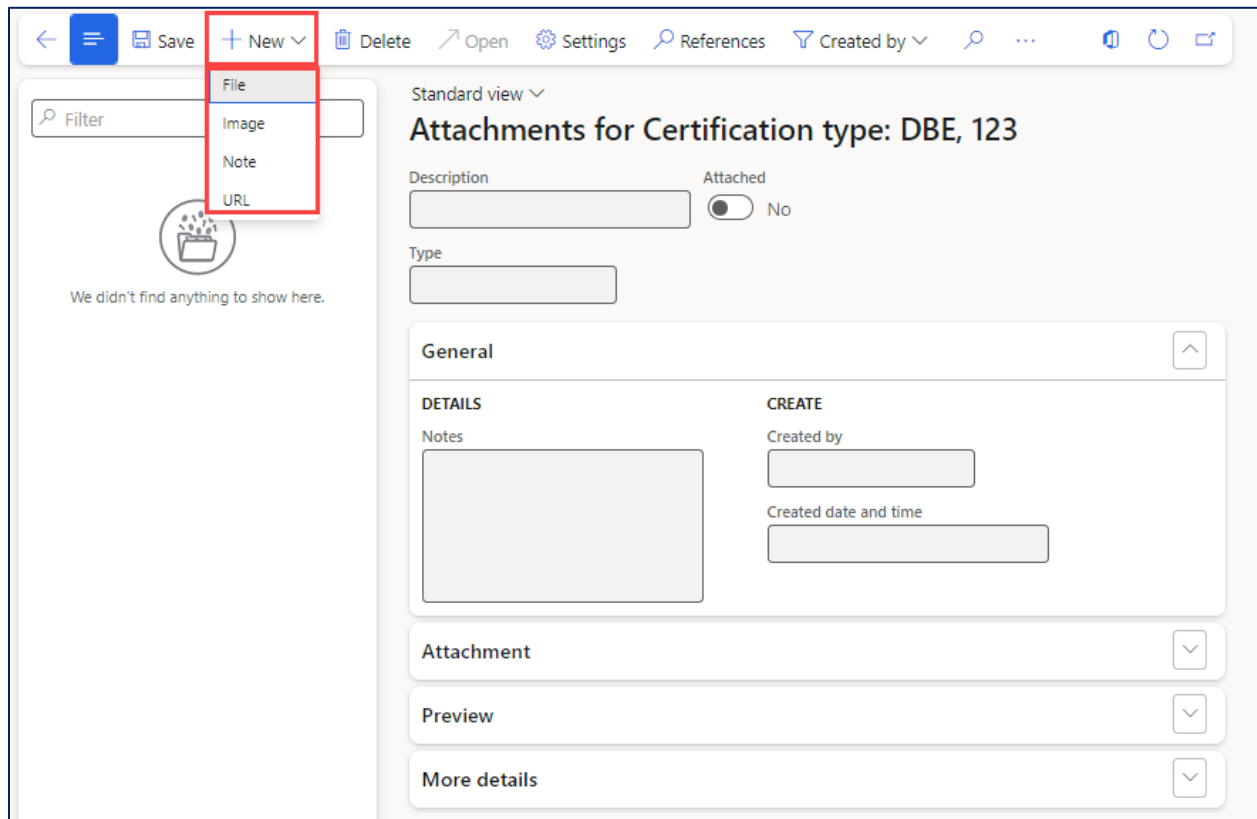


**Step 6:** Click the **Certifications** tab to view vendor certification information. Vendors can **Add** new certifications, **Edit** existing certifications, or attach **Documentation** related to certifications.

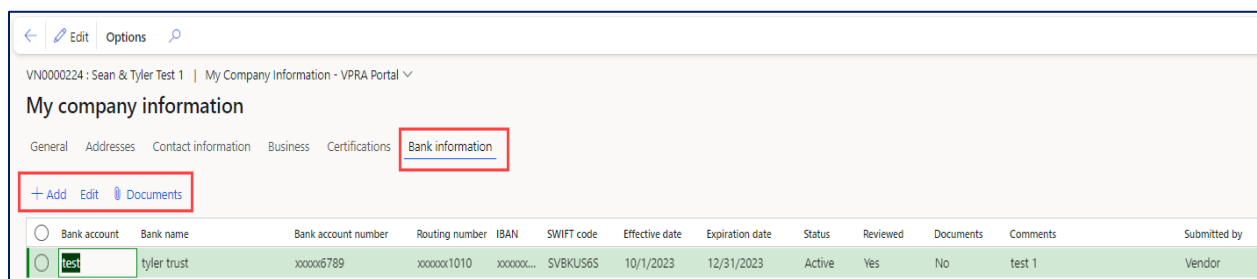
If adding a new certification, select **Add** and complete the **Certification number** and **Certification type**. If applicable, enter a **Certification date**, **Liability amount/bond limit**, **Effective date**, and **Expiration date**. Use the **Comments** field to further describe the Certification type. If providing documentation, **Save** the certification, and then click **Documents**.



Click **New** and select the document type. The system will prompt you to attach a file if selecting **File** or **Image**. Repeat these steps to add additional documentation, then save and close the form once complete. Add a **Description** and **Notes** to describe the document, and use the **Preview** function to see the document.



**Step 7:** Click the **Bank Information** tab. The screen will allow you to **Add** or **Edit** bank account information, as well as attach related **Documents**. Note, your user role may not allow you to change this information.



If adding a new bank account, click **Add** and complete the highlighted fields shown on the screenshot below. All remaining fields are optional. Add supporting documentation to the bank account, following the steps outlined in Step 6 above. Click **OK**.



Standard view ▾

**Bank information**

[Documents](#)

---

Bank account

Bank name  
 \*

Bank account number  
 \*

Routing number  
 \*

IBAN

SWIFT code

Effective date  
 \*

Expiration date

Comments

OK Cancel

**Step 8:** Click **Save** and exit the form to return to the Vendor information workspace.

**Step 9:** Within the **Vendor information** workspace, click the **All contacts** file under Summary level. The screen that opens allows you to view and maintain all contacts, as well as add new contacts.

< Options 🔍

**Vendor information**

VN0000224 ▾

^ Summary

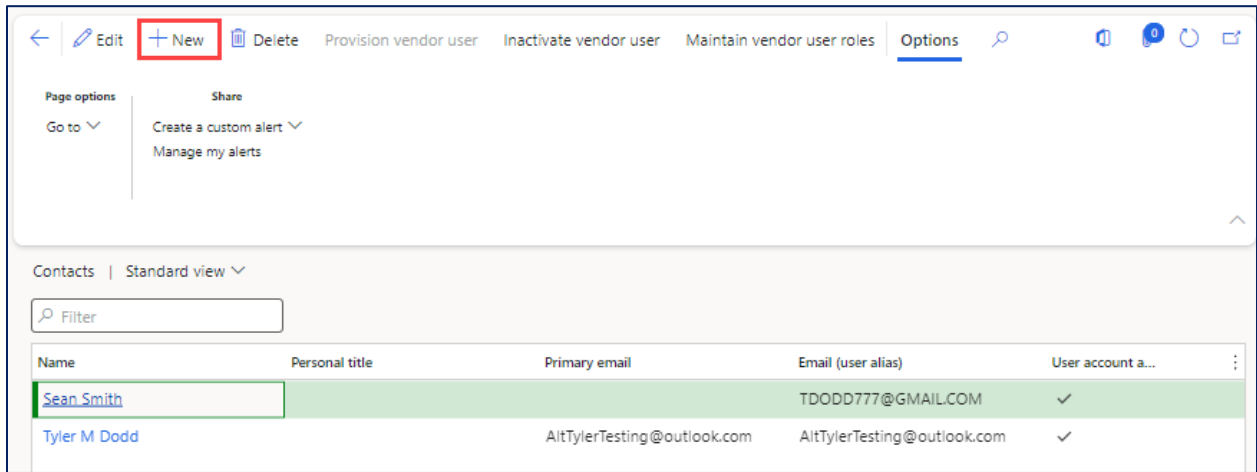
2 All contacts

2 Users

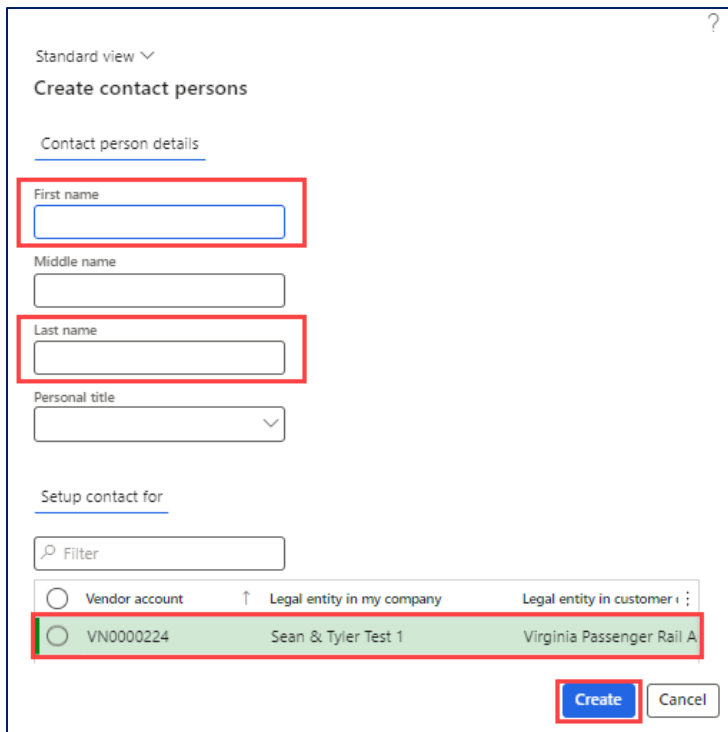
1 User requests

2 Category requests

**Step 10:** Use the **+ New** button to add new contacts and assign their Dynamics user role if you want this contact to have access to the vendor porta. Step 13 explains how to create the user role.

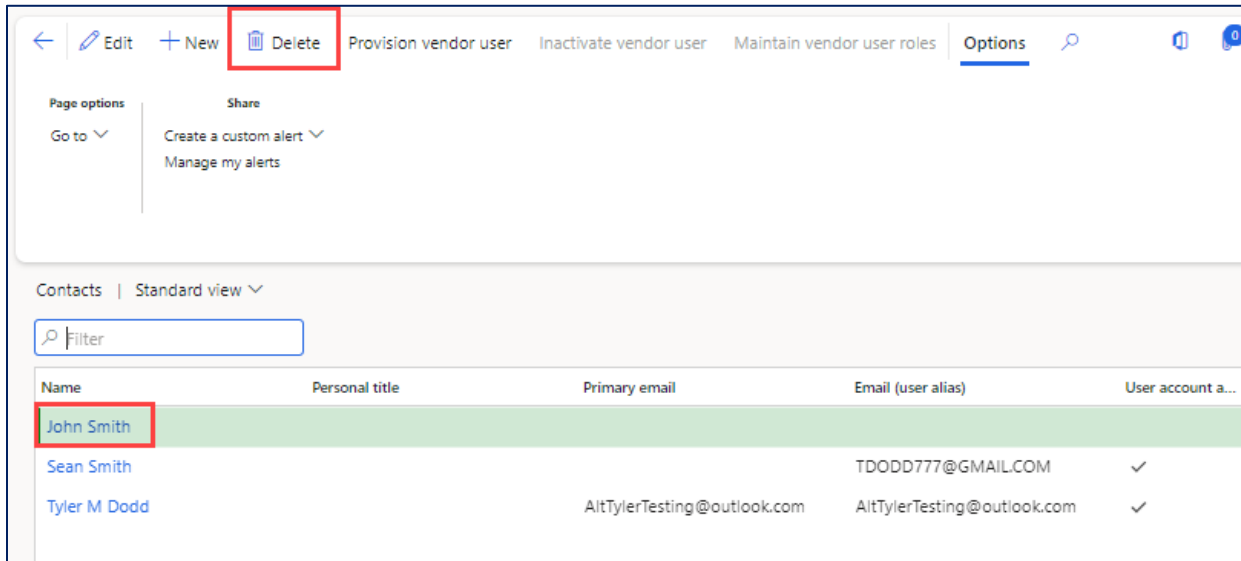


Within the **Create contact persons** screen, enter a **First name**, **Middle Name** (if desired), and **Last Name**. In the **Setup contact for** section at the bottom of the screen, select the legal entity for that contact. Once all of the required information has been entered, click **Create**.

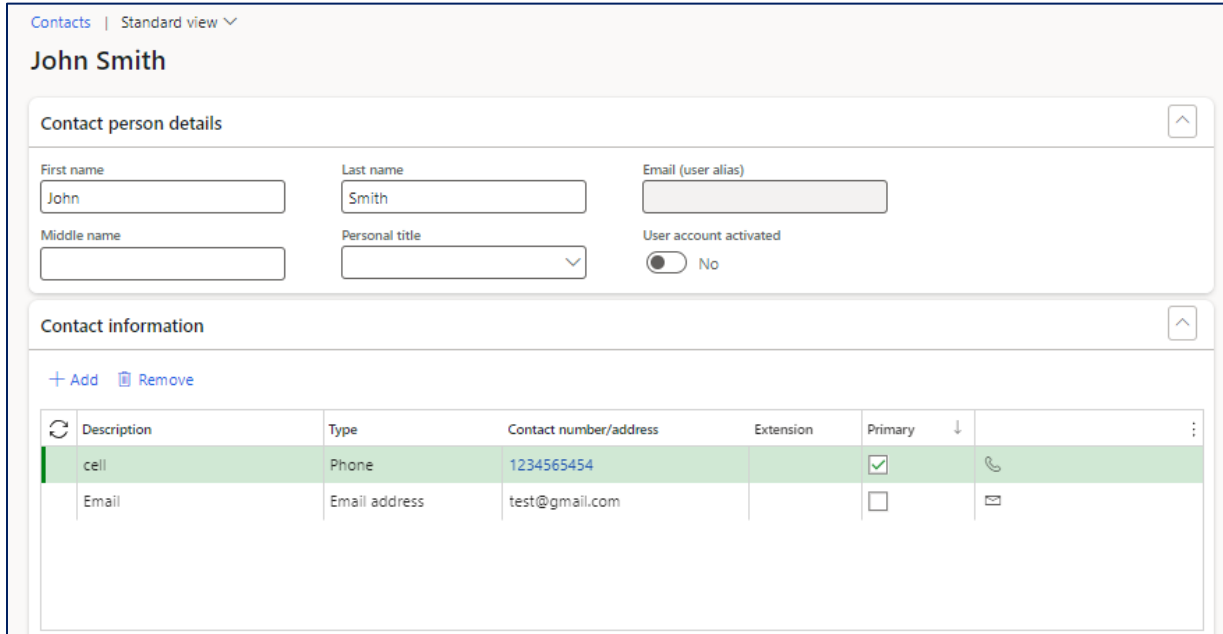


**Step 11:** You will be returned to the **Contacts** screen to see the list of contacts associated with your company. Use can use the **Delete** button to delete existing contacts. **Note**, (1) your primary user account cannot be deleted, and (2) only the primary user can delete contacts.

**Step 12:** To edit existing contact details, click the **Name** hyperlink.



The detailed version of the **Contacts** form will open. Within the **Contact person details** and **Contact information** tabs, you can edit existing information. To add new or remove existing contact information, use the **+ Add** or **Remove** buttons in the **Contact information** fast tab.



Contacts | Standard view

### John Smith

**Contact person details**

First name:  Last name:  Email (user alias):

Middle name:  Personal title:  User account activated:  No

**Contact information**

[+ Add](#) [Remove](#)

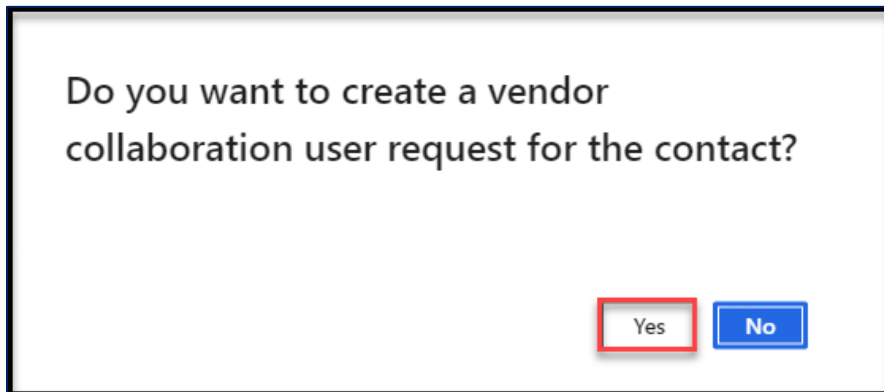
Description	Type	Contact number/address	Extension	Primary	
cell	Phone	1234565454		<input checked="" type="checkbox"/>	
Email	Email address	test@gmail.com		<input type="checkbox"/>	

**Step 13:** You can use the **Remove, Inactivate, Activate, Allow access to vendor collaboration** and **Remove access to vendor collaboration** buttons to perform various actions for that vendor contact from the **Legal entities the person is a contact for** fast tab. A description for each function follows:

<b>Remove</b>	Removes the link between that contact and your portal account. This deletes the individual contact altogether, i.e., the individual will not have access to the portal and will not be listed as a contact for your company.
<b>Inactivate</b>	Deletes the link between the contact and you. <i>Only available when Inactivate is set to "No" on the record.</i>
<b>Activate</b>	Creates a link between a contact and your company. <i>Only available when Inactivate is set to "Yes" on the record.</i>
<b>Allow access to vendor collaboration</b>	Provides user access to the vendor portal. <i>Only available when Vendor collaboration access allowed is "No." If the contact has not yet been provisioned as a portal user, a user request will need to be initiated and processed. See Step 13.</i>
<b>Remove access to vendor portal</b>	Removes contact's access to the vendor portal but keeps the person as a contact. <i>Only available when Vendor collaboration access allowed is "Yes."</i>

See screenshot below.

**Step 14 (Optional step for when “Allow access to vendor collaboration” button is selected in previous step):** The prompt in the screenshot below will pop up. Click **Yes** to provide access to the portal for the newly created contact.



**Step 15:** Select **Provision vendor user**.



**Step 16:** In the **Contact person details** tab, enter the contact's Email (user alias) and a Business justification. Within the **Legal entities the person is a contact for** tab, tick the **Vendor collaboration access allowed** box. In the **Assign user roles** tab, tick the box in the **Assign** column to assign the appropriate security role(s) for the contact. See below for a reminder of the permissions each role provides to a contact. Once all information has been specified, click **Submit**.

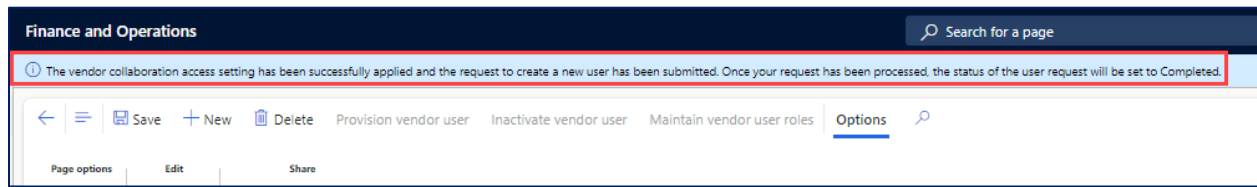
The screenshot shows the 'Provision vendor user' form with three main sections:

- Contact person details:** Includes fields for First name (Jason), Middle name, Last name (Murdoch), and Personal title. The USER SETUP section includes Email (user alias) (Jason.Murdoch@EndlessEngine...), Language (en-US), and Business justification (Onboarding colleague for vendor portal access).
- Legal entities the person is a contact for:** A table with columns: Legal entity in my company, Legal entity in customer company, Inactive, and Vendor collaboration access allowed. One row is highlighted: Endless Engineering, Virginia Passenger Rail Authority, No, and a checked checkbox.
- Assign user roles:** A table with columns: Role description and Assign. Three roles are listed: 'Maintains vendor contact persons and vendor user requests' (unchecked), 'View and print purchase orders and purchase agreements in the vendor portal (external security role)' (checked), and 'Maintains invoices in the vendor portal (external security role)' (checked).

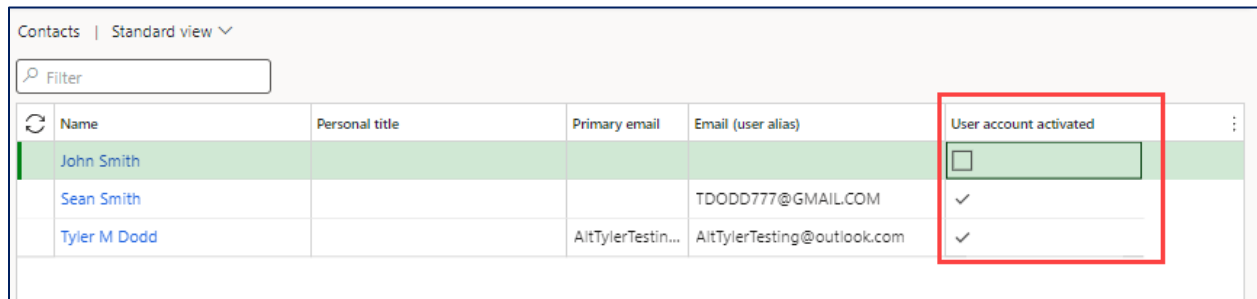
Buttons for 'Submit' and 'Cancel' are located at the bottom right of the form.

User Role	Purpose
1. Maintains vendor contact persons and vendor user requests	Allows a vendor user to provide access to their portal to other vendor staff members
2. View and print purchase orders and purchase agreements in the vendor portal	View-only access
3. Maintain invoices in the vendor portal	Allows a vendor user to submit invoices and to monitor status of payment

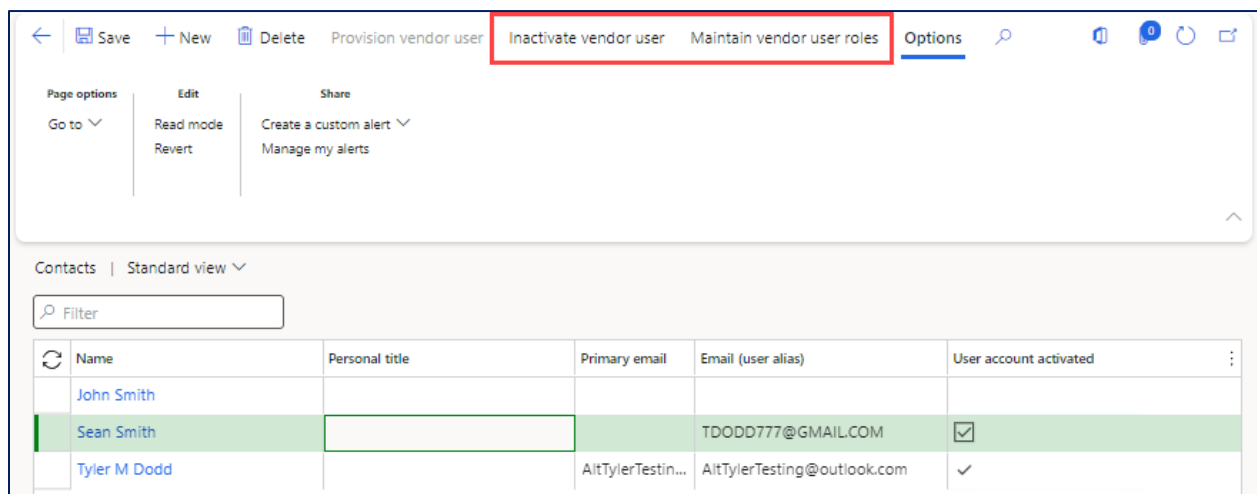
Dynamics will display the following confirmation message after you click Submit. Close the form.



Once the user account request has been processed, you will see that the **User account activated** boxes are ticked in the **Contacts** form.



**Step 17:** In the **Contacts** form, you can use the **Inactivate vendor user** and **Maintain vendor user roles** buttons to inactivate vendor users or to update security role assignments for each contact listed in the organization. *Note, certain fields on these forms will be non-editable because they are not relevant to the specific process.*



**Step 18:** Navigate back to the **Vendor information** workspace. Existing user information can be previewed in the **Users** tile. See screenshot below.

 **Important:** VPRA approves all of your requests to Add a User, but VPRA does not approve changes to an existing User.

**Vendor information**  
VN0000224

Summary

- All contacts: 3
- Users: 3**
- User requests: 2
- Category requests: 2

Vendor details

**Sean & Tyler Test 1**  
Address: 1234 main st, Melrose, NY 12121, USA  
Email address: altylertesting@outlook.com  
Telephone: 1234567891

Vendor contact details

All contacts

**Users**

Name	Email	Vendor account	Name
Tyler M Dodd	AltTylerTesting@outlook.com	VN0000224	Sean & Tyler Test 1
Sean Smith	TDODD777@GMAIL.COM	VN0000224	Sean & Tyler Test 1
John Smith	Test@gmail.com	VN0000224	Sean & Tyler Test 1

**Step 19:** In the **Vendor information** workspace, the **User requests** tile can be used to view and monitor your requests, such as the addition of a new user account or the modification of an existing user account (for example, user account inactivation, a change in security role assignment, etc.).

**Vendor information**  
VN0000224

Summary

- All contacts: 3
- Users: 3
- User requests: 2**
- Category requests: 2

Vendor details

**Sean & Tyler Test 1**  
Address: 1234 main st, Melrose, NY 12121, USA  
Email address: altylertesting@outlook.com  
Telephone: 1234567891

Vendor contact details

All contacts

Users

**User requests**

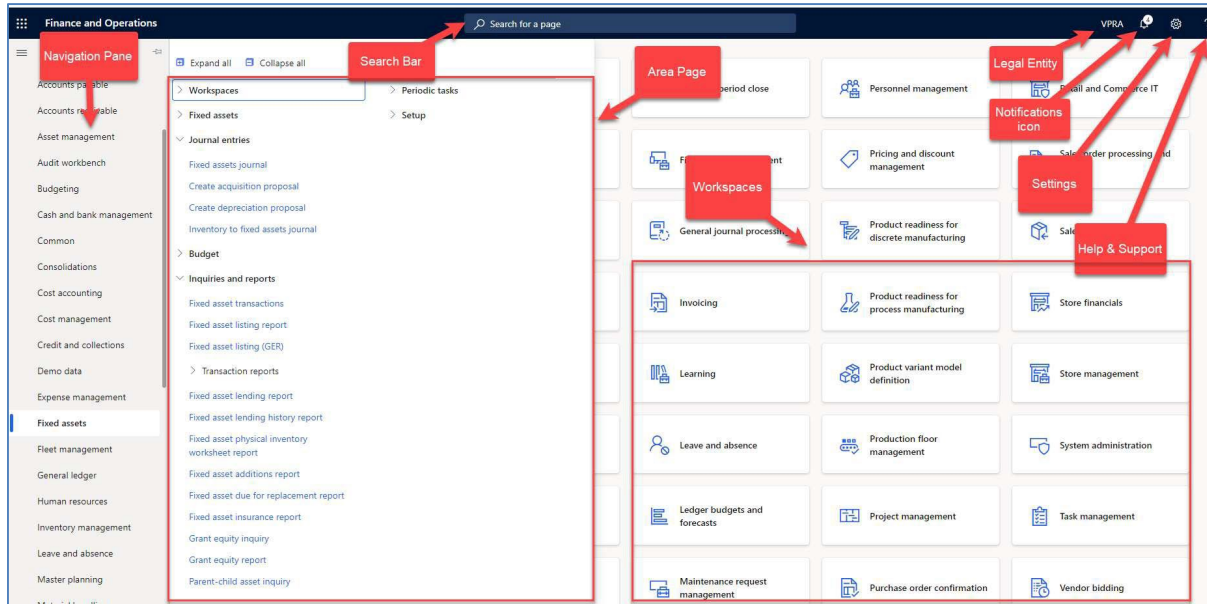
Request ID	Request action	Email	Name
000024	Add user	TDODD777@GMAIL.COM	Sean Smith
000025	Add user	Test@gmail.com	John Smith



## IV. GENERAL NAVIGATION AND USER PREFERENCES

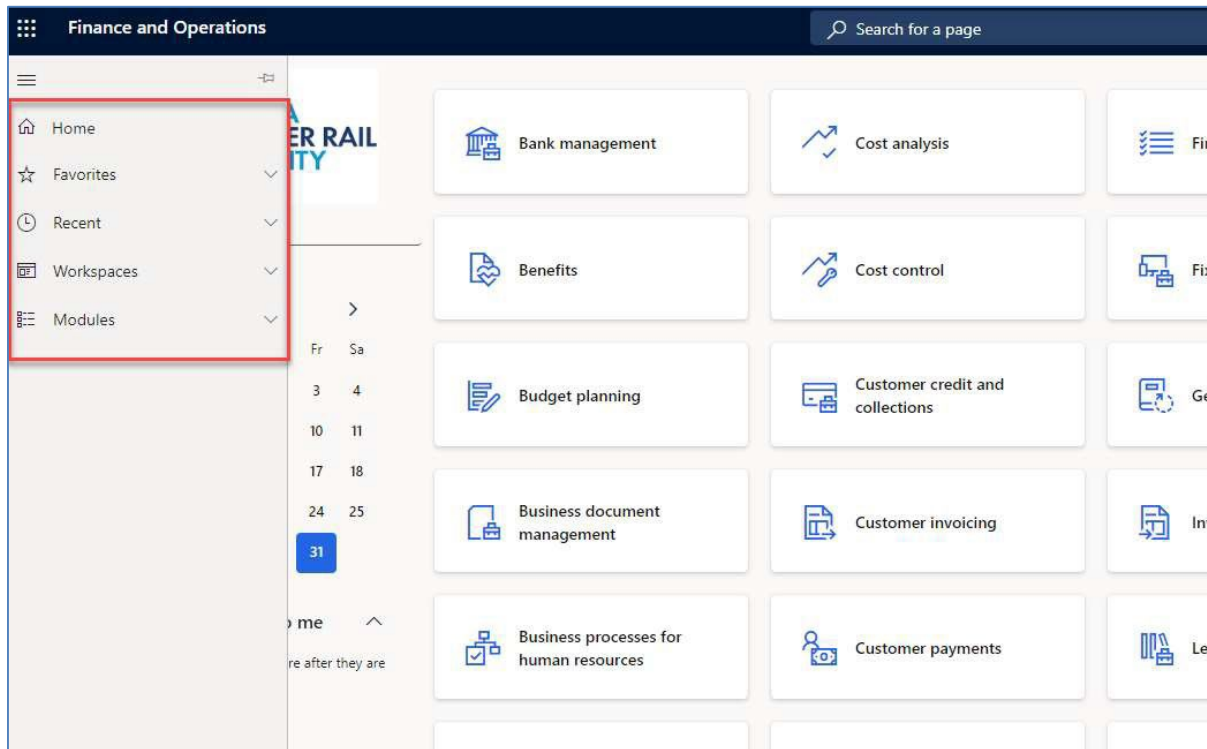
The following sections provide information on how to customize your views, how to navigate around Dynamics, and how to set alerts. These are optional functions that may enhance your user experience.

### Navigation Components



Component	Purpose
<b>Navigation Pane</b>	Menu used to navigate to desired area of Dynamics 365.
<b>Search bar</b>	Search for an item within Dynamics 365.
<b>Area Page</b>	Menu that opens once desired item is selected in Navigation Pane. Reveals areas available within that selection.
<b>Workspaces</b>	Tile listing of Workspaces available to the user.
<b>Legal Entity</b>	Displays your company name.
<b>Notifications Icon</b>	Displays any notifications of which the user should be aware and work items assigned to you.
<b>Settings</b>	Allows you to adjust preferences and settings within Dynamics 365.
<b>Help &amp; Support</b>	Provides general help guides related to the page you are on.

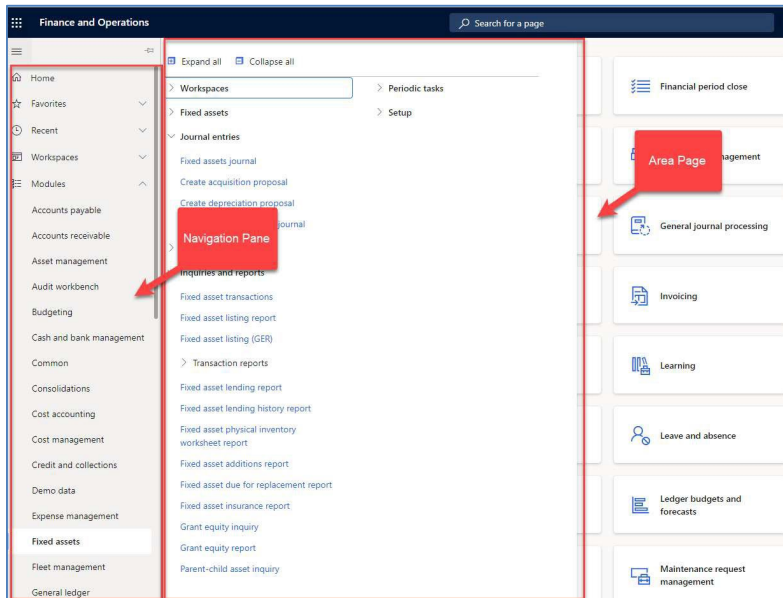
## Navigation Pane Features



Component	Purpose
Home	Brings you back to the general landing page.
Favorites	Allows you to save shortcuts to specific modules, forms, or workspaces for easy access. Favorites can be added by selecting the star next to any menu item in the Area Page.
Recent	Displays most recently accessed forms, pages, or workspaces.
Workspaces	Shows a comprehensive list of all workspaces.
Modules	Shows the comprehensive list of all modules, and displays their corresponding menu items.

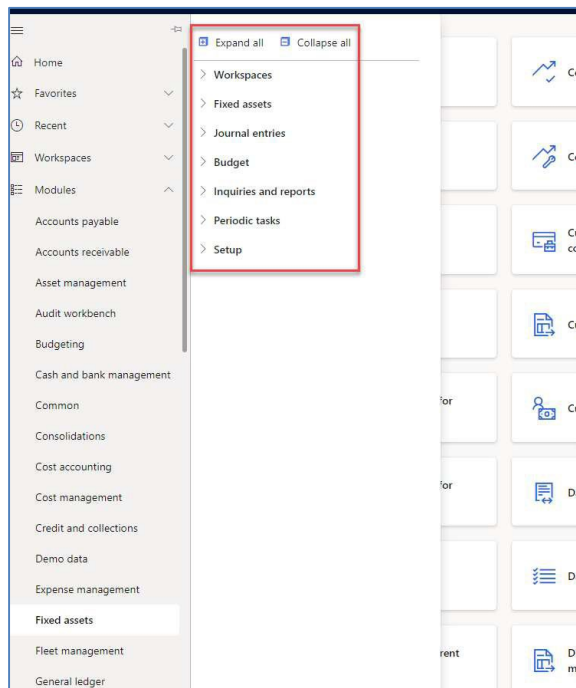
### Switching Modules

The **Navigation pane** (left side of screen) lets the user navigate between modules. Once a module is selected, you are able to navigate within the module using the **Area page**.



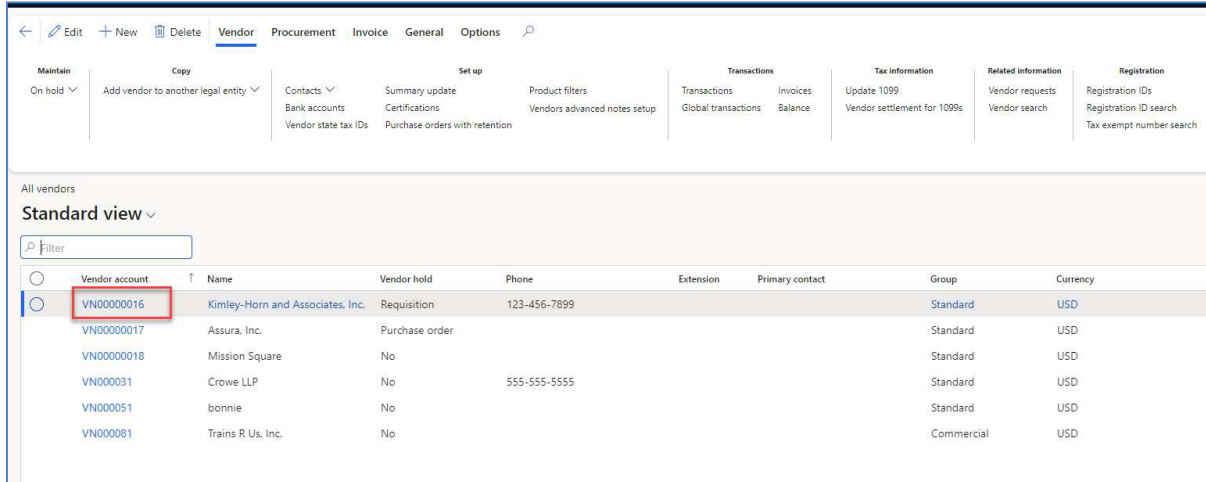
### Area Page Menu Items

The Area page is displayed once a specific module is selected from the navigation pane. It shows all menu items relevant to that module. They are grouped logically to make it easier for users to find what they need. Users can expand or collapse groups by clicking the arrow next to the name.

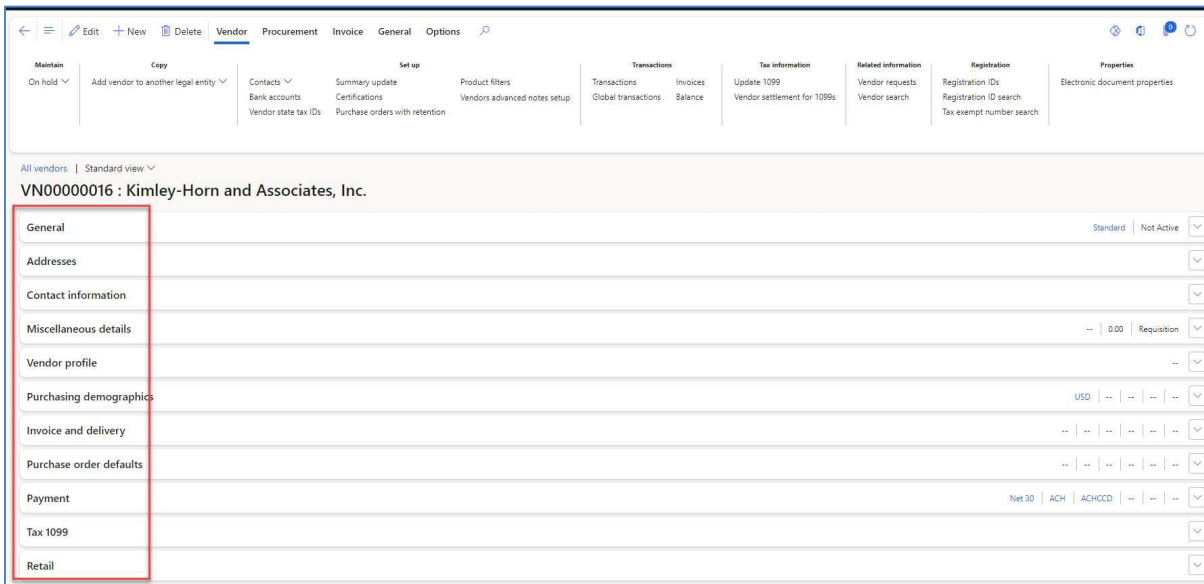


## Form Navigation

All Dynamics 365 forms, regardless of module, operate in a similar fashion. Records can be added by pressing the **New** icon in the toolbar. Highlight a record and double click to drill-down into additional information and/or related tables.



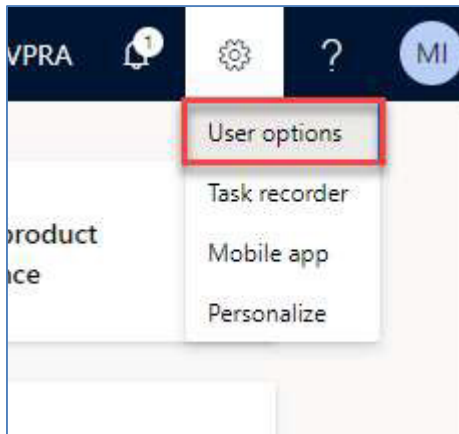
After drilling down into the record, additional tabs allow for further data to be accessed.



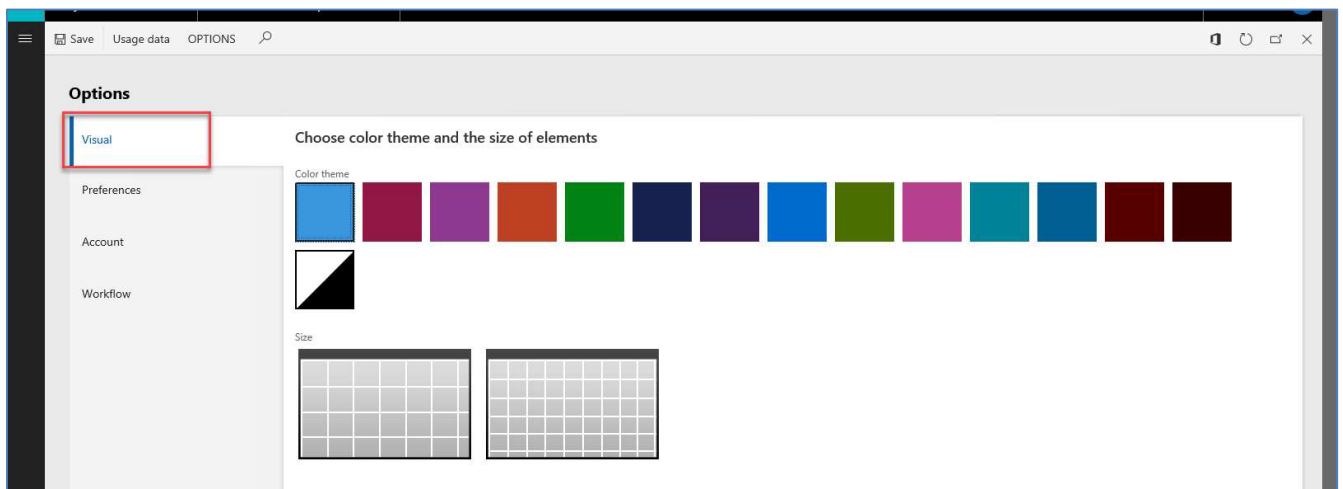
## Environment and User Settings

**Access Menu Path:** Any page within Dynamics

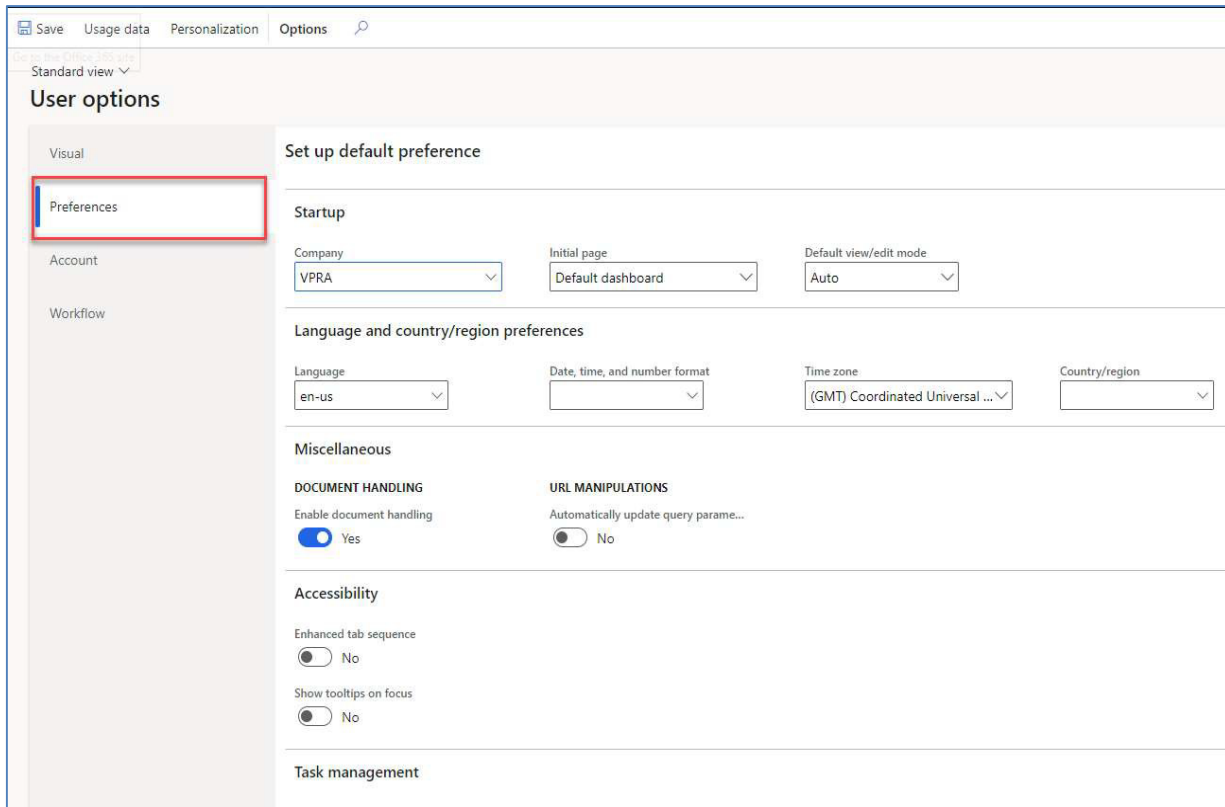
**Step 1:** Click the **Settings** icon (picture of a gear) in the top right corner of the form. Select **User options** from the dropdown.



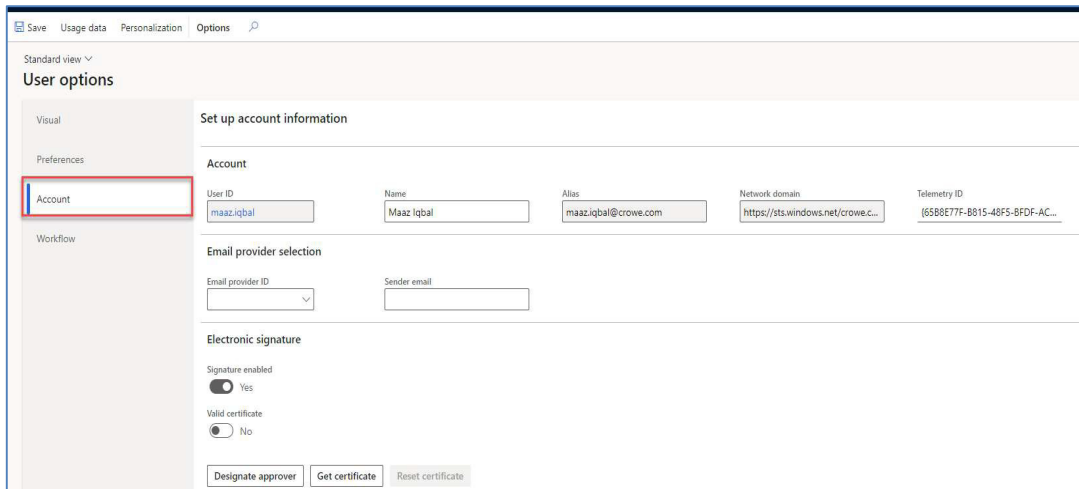
**Visual tab:** Select **Visual** under Options. This tab will allow users to change the **Color theme** and **Size** of icons on their user interface.



**Preferences:** Select **Preferences** under Options. This tab allows you to set your user default preferences within Dynamics. Dynamics defaults to GMT. You can adjust this here for your time zone.



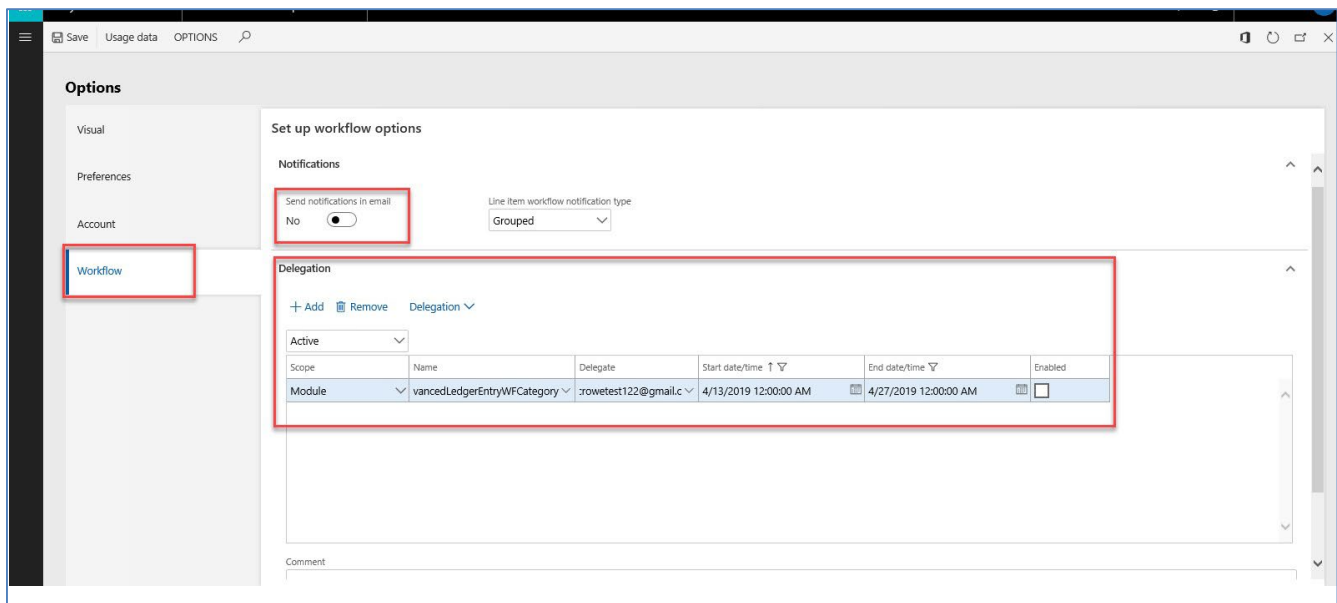
**Account:** Select **Account** under Options. This tab details basic account information for the user.



**Workflow:** Select **Workflow** under Options. Here, you can do the following:

- Enable **Send notifications in email**. If this is enabled, all workflow notifications will be sent as email notifications, as well as notifications within Dynamics.
- Delegation:
  - Users can setup workflow delegation if they are out of the office.
  - Users can setup workflow delegation by the following:
    - Workflow: For a specific workflow
    - Module: For workflows within a module
    - All: For all workflows

**Note:** The three options above are going to be unique per user per situation. For example, to delegate all workflow approvals to 1 user, select **All**. To delegate different workflow approvals to multiple users, choose workflow or module and select the applicable user to whom you want to delegate.



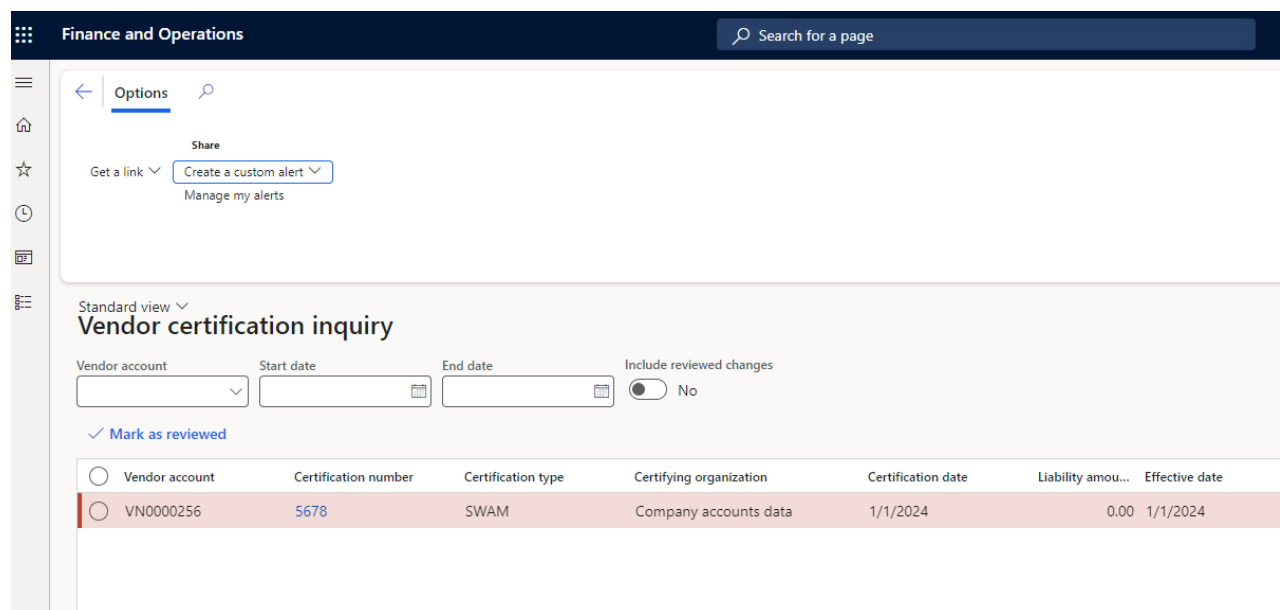
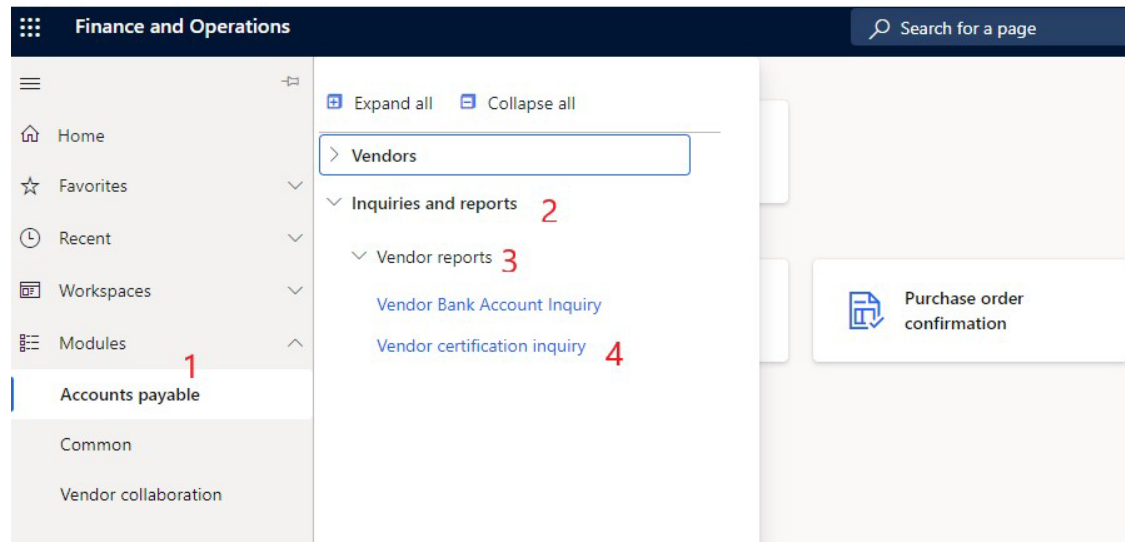
## Setting and Maintaining Custom Alerts

This section explains how to set alerts. You might want to set an alert to tell you when a certification is about to expire, when your company's banking information is changed, or when a new user is added to your vendor portal.

### Vendor Certification Notifications

**Access Menu Path:** Modules > Accounts Payable > Inquiries and Reports > Vendor Reports > Vendor Certification Inquiry

**Step 1:** Following the Access Menu Path above, navigate to Vendor Certification Inquiry.



**Step 2:** Click **Create a custom alert** under **Options**. In the example above, you see that this vendor has a SWAM certification.

**Step 3:** To create an alert so you are warned prior to a certification expiring, select **Set up certifications** under **Table name**. The selection within the **Table name** dropdown will drive the options available under the **Field** dropdown. Choose **Expiration date**. Then, under **Event**, select **Is Due In**. Last, select **a time frame** when you would like to be notified of the upcoming date. In the example below, an alert will be provided when a certification is set to expire in 3 months.



**Step 4:** Within the **Alert me for** tab, you can choose to receive the notification for **All records In Setup of Certifications** (i.e., all certifications) or just for the **Current record** (i.e., specific certification) selected.

**NOTE:** The Organization-wide toggle does not need to be changed. It does not have functionality in VPRA's system.

**Step 5:** Under the **Alert me until** tab, select an **End date** or select **no date** to create an open-ended alert. For alerts regarding expiration dates, it is recommended to set the **End date** to the same date that the alert will be triggered. For example, if a certification expires on 3/31/24 and the alert will be triggered 3 months prior to the expiration date, the **End date** should be 12/31/23.

**Step 6:** Under the **Alert me with** tab, add a **Subject**, **Message**, and **User ID** for the alert.

**Note:** Only users with system administration access can assign alerts to other users. The **User ID** field will not be available for most users.

**Alert me with**

Subject  
Field Expiration date in table Se...

User ID  
Tyler.Dodd

Message  
This certification expiration date is approaching.

Send email  
 No

Send externally  
 No

Email recipients  
Tyler.Dodd@crowe.com

**Step 7 (Optional):** Toggle **Send Email** to **Yes** to also receive the notification via email. More than one **Email recipient** can be added by using a **semicolon** to separate the email addresses. Once all information is entered, click **OK**.

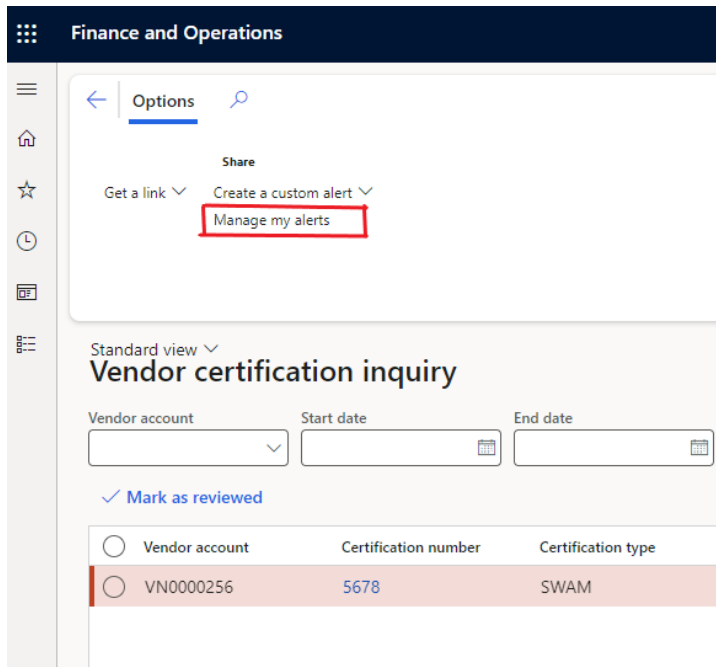
Send email  
 Yes

Send externally  
 No

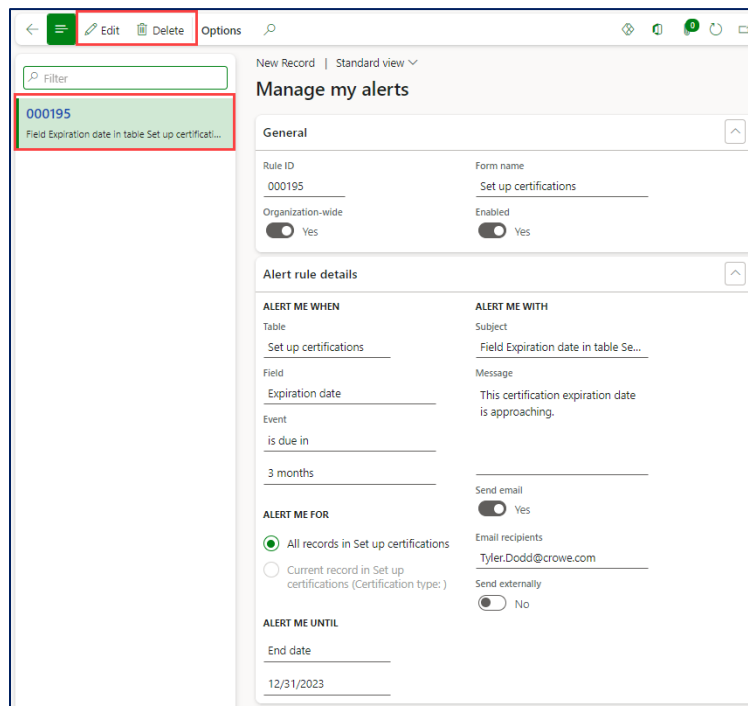
Email recipients  
Tyler.Dodd@crowe.com

OK Cancel

**Step 8:** Once the alert has been created, view the alert by clicking **Manage my alerts** within the **Options** tab in the ribbon.



**Step 9:** Use the **Edit** and **Delete** buttons in the ribbon to edit or remove the alert.



## Portal Security and Privacy

As a registered vendor in VPRA's Vendor Portal, you are responsible for the security of your portal account along with your login credentials. You and your users need to protect your account

information and your login credentials. You will be responsible for any loss or damage you sustain as a result of your failure to protect your account information and your use of VPRA's Vendor Portal. If you believe or know your portal account and/or credentials have been compromised, please let VPRA know immediately.

Vendor Users are also responsible for complying with VPRA's Privacy Policy. A copy of the policy is posted on VPRA's website and can also be accessed here: <https://vapassengerrailauthority.org/about/privacy-policies/>.