Your new homepage

- Enterprise account users have a number of menu bar options. Standard account users have most menu bar selections disabled. See what’s new Video

Make the Overview work for you

- You can use up to 25 overview tiles to highlight key tasks to complete and when clicked open a detailed overview of documents below. BHP have some suggestions to make this easier.
  ➤ Create customised filters for tiles based on what details different users need. For example only show orders for BHP Petroleum purchasing address. Click on tile you want to change then click the Edit Filter in the Workbench view. A set of available fields that can be used appears below. Select all field changes then Apply. Create a new name for the tile.
- BHP requires all orders to be confirmed before invoice. But there are 3 different tiles: Orders has all orders for all buyers, New Orders shows last 31 days of orders from all buyers and Change Orders shows any new versions of orders previously received.
  ➤ Create a new BHP to Confirm tile that includes all new & changed orders for BHP.
- Add new tiles to see key documents. Recommended tiles are Rejected Invoices, Service Sheets, Invoice Pending Approval and Scheduled Payments. To add new tiles click Customise above the Overview tiles then use the + to add and to remove tile click on the tile and then select the – to remove them from your list. You can change the list at any time.

Enterprise Users – from Order to Invoice

- Confirm Orders Login and check the BHP to Confirm tile you created (or the generic New Orders & Change Orders tiles). Click on the tile to see the Workbench area below where a list of orders that are not confirmed will appear. You can select each order and then go to Actions and Create confirmation. Update the details item quantity, price, delivery date, part number etc
- Edit & Resubmit Invoices Check the Rejected Invoices tile. Click on the tile to see the Workbench area below where a list of rejected invoices will appear. Click the invoice number to see the reasons. Use the Edit & Resubmit button to make changes.
- Create Service Sheet Select the Orders tile. Select the correct order from the workbench below then use the Create Service Sheet option from the action list on the right side. You can also go to the Create button at the top of the page Create Service Sheet. Remember 1-step invoice & SES is still available.
- Create Invoice Select the Orders tile. Select the correct order from the workbench below then use the Create Invoice option from the action list on the right side. You can also go to the Create button at the top of the page Create PO Invoice. Remember 1-step invoice & SES is still available.

Standard Account – Use the homepage

- Standard account users can login directly to their account and send an email of the PO when needed rather than trying to find their stored emails. Login and send a copy of the most recent version of the PO before commencing and other document.
- Send me an email Standard account users must still use the Process Order button on the email but can now check that they have the newest version of each Purchase Order before they commence. See up to 365 days of orders (after you change the filters on the Order tile).
- Check orders to confirm Check the BHP to Confirm tile (or the generic New Orders & Change Orders tiles). Click to see the Workbench area and select each order that needs to be confirmed. Go to Actions against each order and select Send me an Email. Use the email Process Order button to action the Create confirmation and update the item quantity, price, delivery date, part number etc
- Check orders to create Service Entry Sheet Check the Orders tile then select the order where a invoice is needed then go to Actions and Send me an Email. Use the email Process Order button to action the Create PO Invoice (use for 1-step service invoicing) and complete the details.
- Check Invoice Status and Scheduled Payments Use the tiles to see the Invoice Status – acknowledged, approved, rejected- and once the invoice is approved see date of payment in Scheduled Payments.