

USAID GLOBAL HEALTH SUPPLY CHAIN PROGRAM

Procurement and Supply Management

ACCESSING VENDOR PORTAL

PICKUP ADDRESS MANAGEMENT



November 20, 2022

This publication was produced for review by the U.S. Agency for International Development. It was prepared by Chemonics International Inc.

DISCLAIMER

The authors' views expressed in this publication do not necessarily reflect the views of the U.S. Agency for International Development or the U.S. government.

Table of Contents

Pickup Address Management.....	3
Overview.....	3
Features.....	3
Navigating to Pickup Locations in ARTMIS Supplier Portal	3
Search Pickup Locations:	5
Create Pickup Locations:	6
Edit Pickup Location Contact Details:	11
Delete Pickup Location	12

Pickup Address Management

Overview

The purpose of this guide is to outline the steps needed for Suppliers to successfully add and manage pickup location addresses in the Ivalua Supplier Portal module within the Chemonics ARTMIS platform. The form is a structured way of using the GS1/GLN format for suppliers to manage their pickup addresses in Ivalua to allow successful delivery of purchase orders.

As a Supplier, you will need to perform the following activities/steps as part of the creation of Supplier Pickup Locations. This is a multistep process that also requires a GHSC Quality Assurance process to validate the address via a system workflow. Failure to follow the process may delay the processing of purchase orders.

Validated addresses will be integrated in ARTMIS and allow procurement users to select the pre-approved pickup address during the purchase orders creation process.

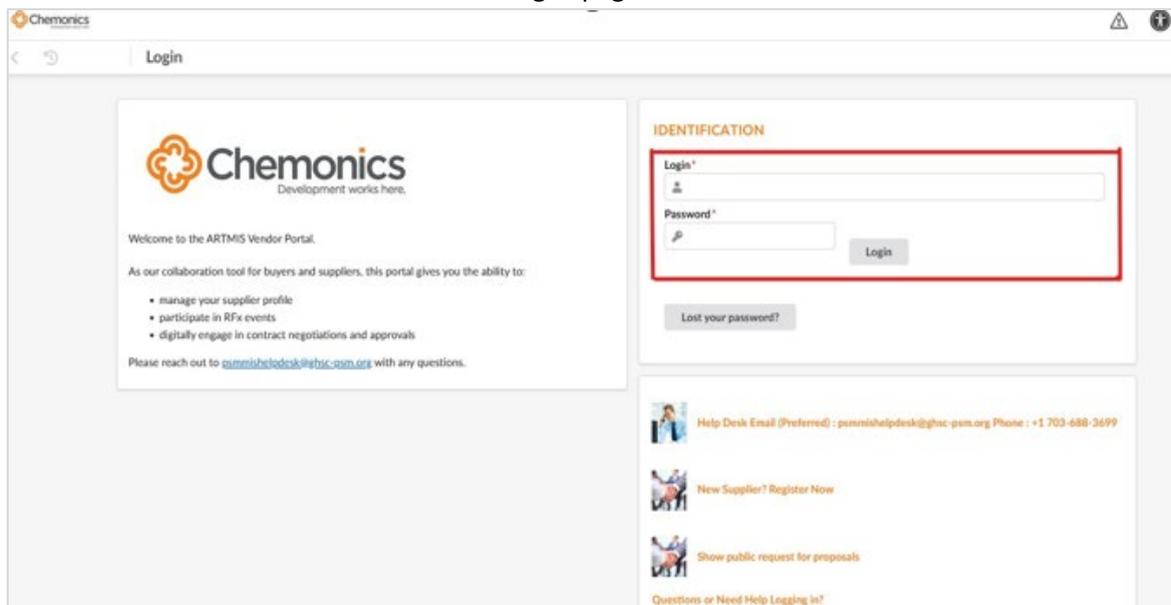
Please direct inquiries to your Supplier Relationship Manager and/or to the PSM MIS Help Desk at psmmishelpdesk@ghsc-psm.org.

Features

- Search Pickup Locations
- Create Pickup Locations
- Edit Pickup Location Contact Details
- Delete Pickup Locations

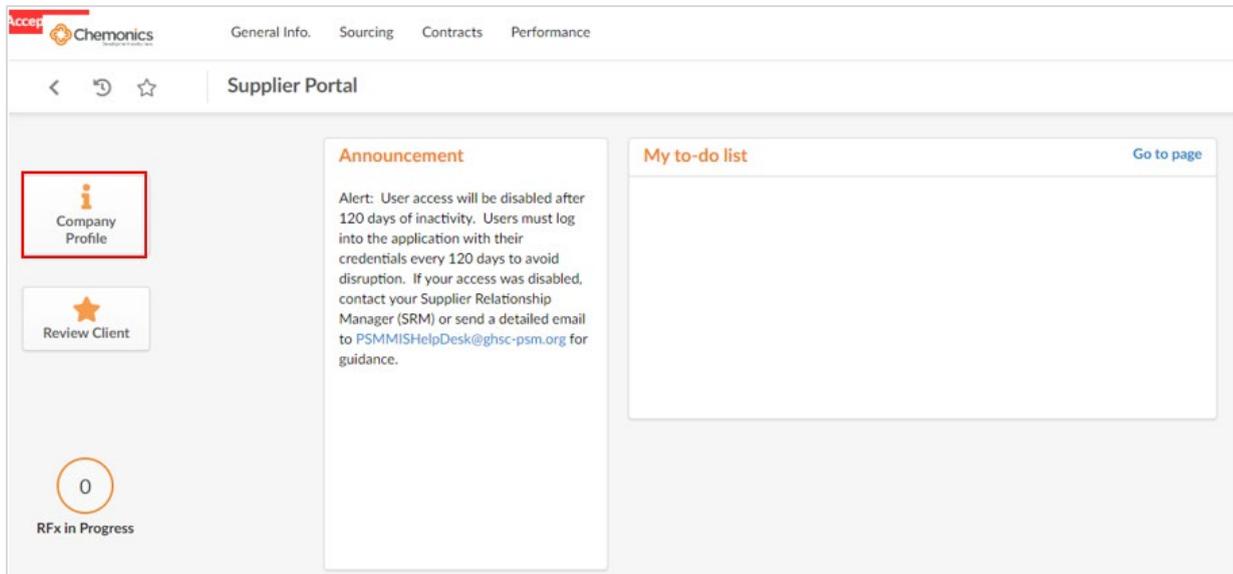
Navigating to Pickup Locations in ARTMIS Supplier Portal

- Access the Web browser and enter <https://chemonics.ivalua.app/page.aspx/en/usr/login>. The user will be taken to Chemonics User Interface log in page.

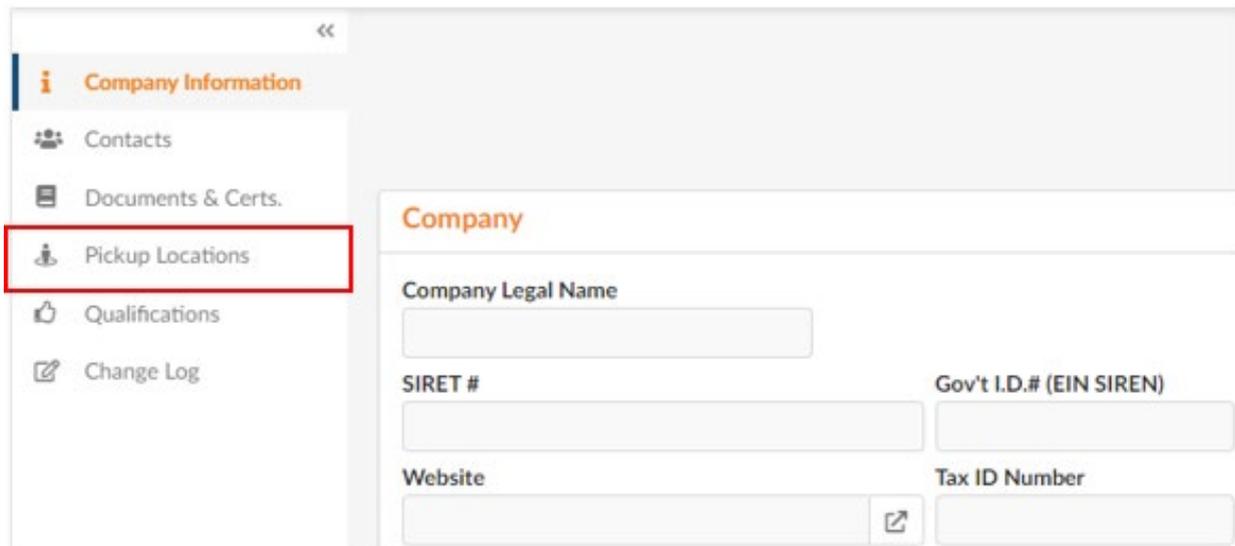


Accessing Vendor Portal – Pickup Address Management

- After successfully entering your credentials, you will be taken to the home page of the Supplier Portal. Select the **Company Profile** button to navigate to the General Info Page.



- On the **General Info Page**, select the **Pickup Locations** link on the left navigation bar.



Accessing Vendor Portal – Pickup Address Management

Search Pickup Locations:

Pickup Location has been part of ARTMIS for some time, you may have provided those details to Procurement Specialists for purchase order processing. We've taken those Pickup Location Addresses and loaded that data to ARTMIS. Prior to creating new Pickup Locations, Suppliers are requested to search for Pickup Locations listed under their supplier profile.

The screenshot shows the 'Pickup Locations' tab in the vendor portal. At the top, there are four search criteria fields: 'Keywords', 'Location GLN', 'Company Name', and 'Location Status'. A red box highlights these fields. To the right of these fields are 'Search' and 'Reset' buttons. Below the search bar is a green 'Add Pick-up Locations' button. Underneath is a table with the following columns: 'Location GLN', 'GS1 Location Type', 'Location Role', 'Company Name', 'Location Status', and 'Pick-up Address'. The table currently displays '0 Record(s)'.

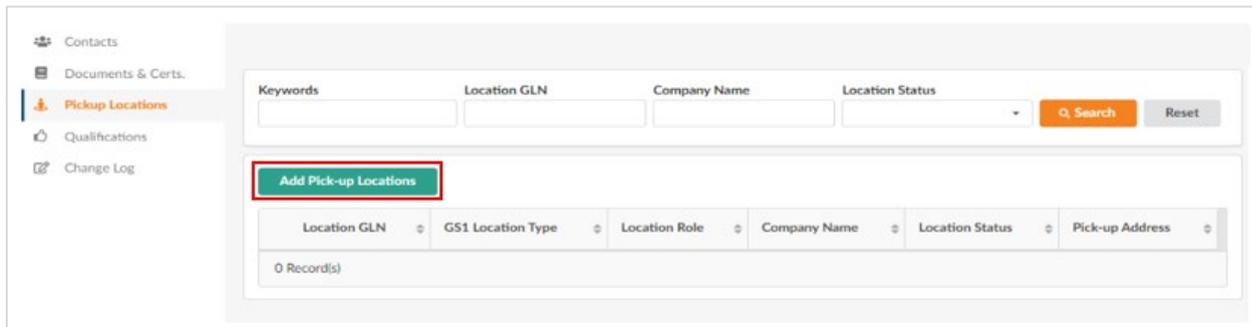
- Users can search for the Pickup Location using the search criteria fields available on the Pickup locations tab. Those fields are Keywords, Location GLN, Company Name and Location Status.
 - **Keywords:** You may search by adding key words contained in a Pickup Location address. This search functionality completes a “wild card” search on all records based on the key word and may not yield correct results.
 - **Location GLN:** Specify the GLN of the Pickup Location Address to retrieve the record.
 - **Company Name:** Specify the company name of the Pickup Location to retrieve the record.
 - **Location Status:** Search by the status of the Pickup Location. The following statuses are listed in the drop down - Draft, Validation in Progress, Validated and Approved.
- You may also export the Pickup Location Addresses under your profile to complete an offline search. To download Pickup Locations, select the small gear icon and select the **Download Table** option. *Note: The file will be downloaded in Excel format.*

The screenshot shows the 'Pickup Locations' search interface with a data table. The search criteria fields are visible at the top. Below them is an 'Add Pick-up Locations' button. The table has the following columns: 'Location GLN', 'GS1 Location Type', 'Location Role', 'Company Name', 'Location Status', and 'Pick-up Address'. The table contains 8 records. A settings menu is open on the right side of the table, showing 'Grid settings' and 'Grid column settings'. Under 'Grid Actions', the 'Download table' option is highlighted with a red box. The text next to it reads: 'Download table "Pickup Locations for Company Info ****TEST SUPPLIER- DO NOT USE ****(UNITED STATES / Virginia)" in Excel format'. A red arrow points to the gear icon at the bottom right of the table.

- If an address listed is not correct and/or not valid, contact the PSM MIS Help Desk with the correct details. The PSM MIS Help Desk will escalate and provide this information to the appropriate team to remove the address. You will be provided with an update once the task has been completed.
Note: PSM MIS Help Desk – psmmishelpdesk@gpsc-psm.org

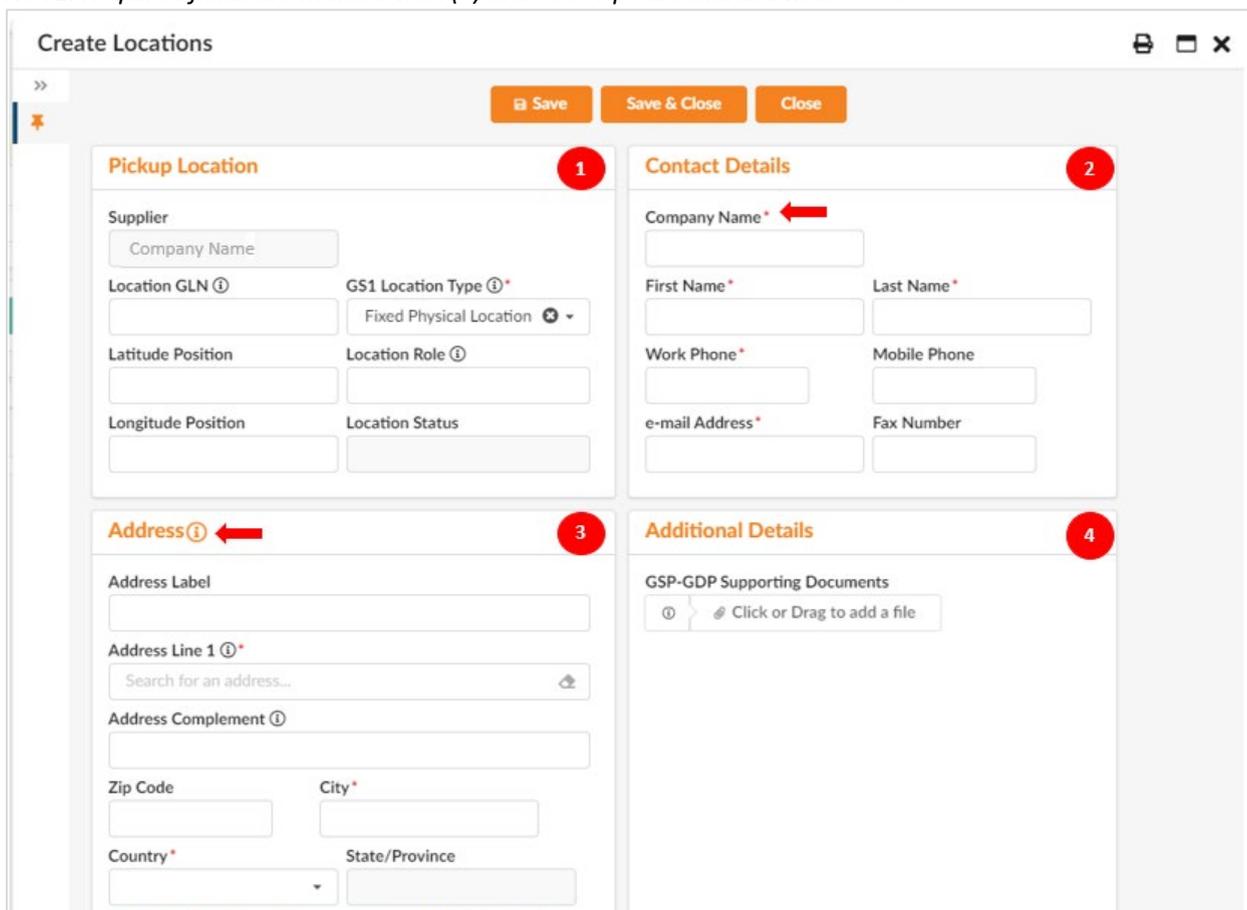
Create Pickup Locations:

- To create a Pickup Address Location, select the **Add Pick-up Locations** button.



- On the **Create Locations** Page, you will need to complete details within the four sections shown in the below screenshot. Within each section there are mandatory fields and Tool Tips for referencing.

NOTE: Required fields are marked with (*) and Tool Tips are marked with ⓘ .



1. **Pickup Location Details:**

Within this section, enter the detailed information related to the pickup location as per the recommended GS1/GLN format. Sharing the details of the fields.

- Supplier:** This field will auto-populate with your company name and cannot be updated.

- b. **Location GLN:** As per the GS1 data model, specify the 13-digit GLN code obtained for this location as part of the GS1/GLN Standards. Error will be shown in case the GLN number format incorrectly entered (less or more than 13 digit or alphanumeric code entered).
 - c. **GS1 Location Type*:** By default, this field will be auto populated with the value as “Fixed Physical Location” This field can be updated by selecting the location type values in the dropdown menu.
 - i. **Legal Entity:** A legal entity is any business, government body, department, charity, individual, or institution that has standing in the eyes of the law and has the capacity to enter into agreements or contracts.
e.g., Corporation, Subsidiary, Government body etc.,
 - ii. **Fixed/Mobile Physical Location:** A fixed physical location is expected to main in the same location for its entire lifecycle while a mobile physical location is expected to change its place.
e.g., Corporate Headquarters (Fixed), Warehouse/Distribution (Fixed), Mobile van (Mobile)
 - iii. **Function:** A function is an organizational subdivision or department that is most commonly segmented based on the specific tasks being performed, as defined by the organization.
e.g., Accounting department, HR department etc.,
 - iv. **Digital Location:** A digital location is an electronic (non-physical) address that is used for communication between computer systems.
e.g., API Entry
 - d. **Location Role:** Enter the role of that location type defined. Please refer to the above location type section for examples of location roles given for each location type.
 - e. **Latitude:** Latitude information of the location (*if available*).
 - f. **Longitude:** Longitude information of the location (*if available*).
2. **Contact Details:**
- a. **Company Name*:** In this field, provide the company name of the pickup of the location for identification.
 - b. **First Name*:** First name of the point of contact for that pickup location.
 - c. **Last Name*:** Last name of the point of contact for that pickup location.
 - d. **Work Phone*:** Work phone information of the point of contact.
 - e. **Mobile Phone:** Mobile phone information of the point of contact.
 - f. **Email Address*:** email address of the point of contact.
 - g. **Fax Number:** Fax Number details.
3. **Address Details:**
- a. **Address Label:** Please enter the label for the address to where it points to.
 - b. **Address Line 1*:** In this field, enter the address manually or search for the address if linked to google maps. *NOTE: Please refer to the tool tip for details.* ⓘ
 - c. **Address Complement:** This field is an additional address line field. This field has a character limit of

70 characters. *NOTE: Please refer to the tool tip for details.* ⓘ

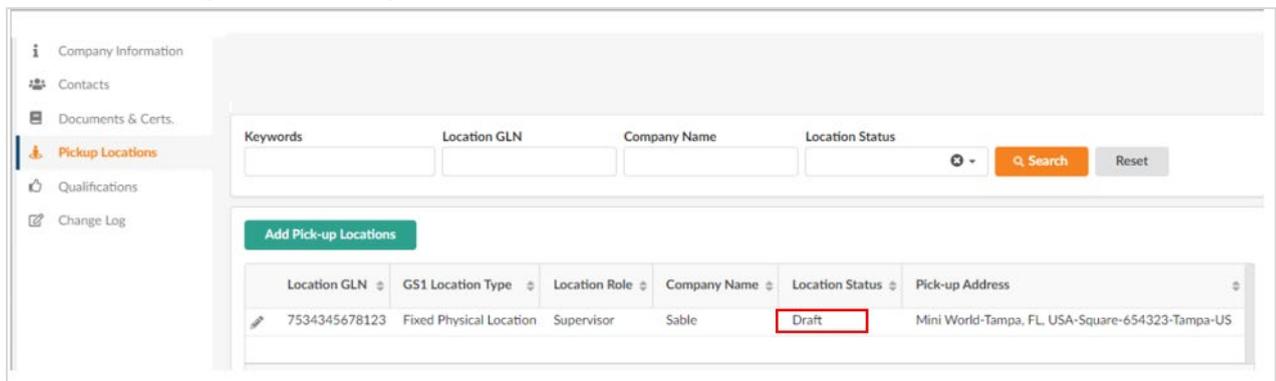
- d. **Zip code:** Zip code details.
- e. **City*:** City details.
- f. **Country*:** Country can be chosen from the drop-down values.
- g. **State/Province*:** Once country information has been selected, this field will become editable and provide the list of State/province relevant for that country.

4. Additional Details:

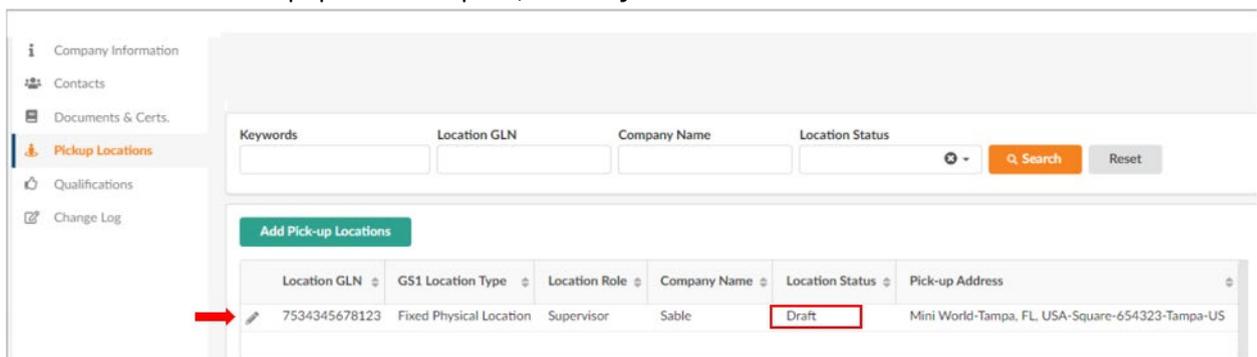
In this section, Good Storage Practice (GSP) or Good Distribution Practice (GDP) documentation can be attached as a supporting document for the pickup location being added. This will be useful to validate the pickup location internally.

NOTE: There is a file size limit of 66560 kb. Please refer to the tool tip for details. ⓘ

- Once all details are entered, select the **Save** or **Save & Close** button. The pickup location will be in **Draft** status. When using the **Save & Close** button, the draft record is saved and the pop-up window closes. This option can be used to save the draft record and add additional information to the pickup location details at a later point in time. Once the Pop-up window closes, the details of the pickup location are in a grid view in **Draft** status.



- To edit the details of the pickup location in **Draft** Status, select the **Pencil** icon to the left of the draft location record. Once selected a pop-window opens, the **Draft** record can be edited.



- Select the **Submit** button to send the pickup location information for GHSC PSM internal approval.

The screenshot shows the 'Create Locations' form with two main sections: 'Pickup Location' and 'Contact Details'. The 'Submit' button is highlighted with a red arrow. The 'Pickup Location' section includes fields for Supplier (Company Name), Location GLN (1234567896547), GS1 Location Type (Fixed Physical Location), Latitude Position, Longitude Position, Location Role (Pickup Location), and Location Status (Draft). The 'Contact Details' section includes fields for Company Name, First Name, Last Name, Work Phone (5551212), Mobile Phone (5551212), e-mail Address (firstlast@company.com), and Fax Number.

- Once submitted, the status of the pickup location will be in **Validation in Progress** status.
Note: Editing is NOT possible once the pickup location is submitted for validation.

The screenshot shows the 'Create Locations' form after submission. A success message at the top reads 'Data has been saved' and 'Validated successfully'. The 'Location Status' field in the 'Pickup Location' section is now 'Validation in Progress', highlighted with a red box. The 'Contact Details' section is populated with test data: Company Name (Test Company Limited), First Name (First Name), Last Name (Last Name), Work Phone (+1234567895), Mobile Phone (+9876543214), e-mail Address (first@last.com), and Fax Number (+5464741655).

- Select the **Close** button to close the pop-window. The details of the pickup location are in a grid view and in **Validation in Progress** status.

The screenshot shows a table with the following columns: Location GLN, GS1 Location Type, Location Role, Company Name, Location Status, and Pick-up Address. The 'Location Status' column for the first row is highlighted with a red box and contains the text 'Validation in Progress'.

Location GLN	GS1 Location Type	Location Role	Company Name	Location Status	Pick-up Address
	Fixed Physical Location		Test 1	Validation in Progress	Test One-Council Bluffs, IA, USA- Council Bluffs-US

- The Pickup Location status transition is as follows: Draft > Validation in Progress > Validated > Approved. Once the Pickup Location moves from **Validated** to **Approved**, you will receive an approval notification.

Accessing Vendor Portal – Pickup Address Management

- Note: The screenshot below displays the grid view of the pickup location in **Validated** status.

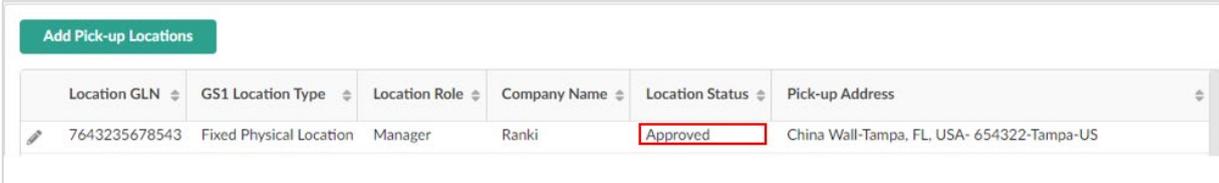


The screenshot shows a table with the following columns: Location GLN, GS1 Location Type, Location Role, Company Name, Location Status, and Pick-up Address. A single record is displayed with the status 'Validated' highlighted in a red box.

Location GLN	GS1 Location Type	Location Role	Company Name	Location Status	Pick-up Address
	Fixed Physical Location		Test	Validated	Tampa, FL, USA- 631602-Tampa-US

1 Record(s)

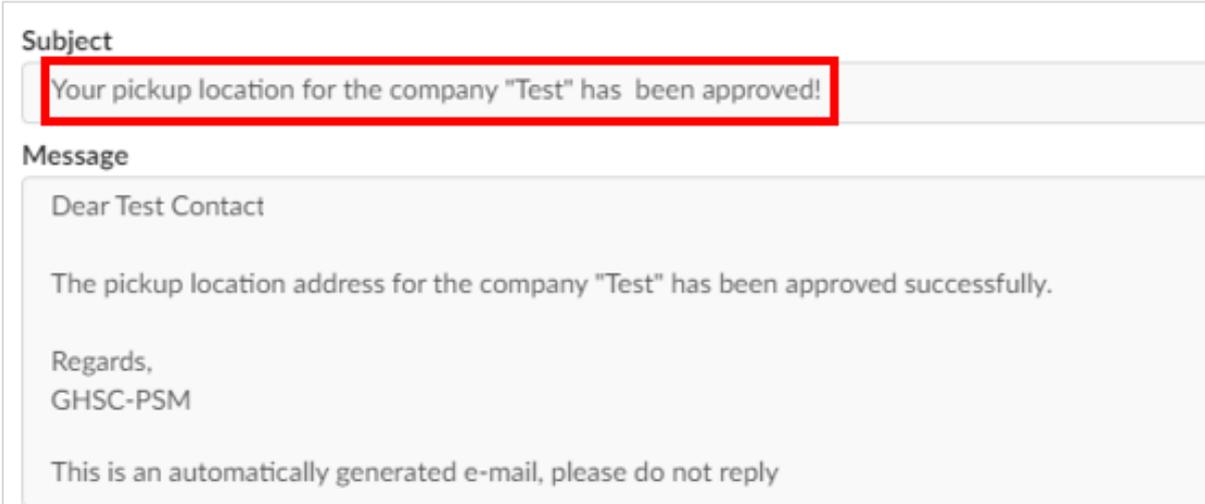
- Note: The screenshot below displays the grid view of the pickup location in **Approved** status.



The screenshot shows a table with the following columns: Location GLN, GS1 Location Type, Location Role, Company Name, Location Status, and Pick-up Address. A single record is displayed with the status 'Approved' highlighted in a red box.

Location GLN	GS1 Location Type	Location Role	Company Name	Location Status	Pick-up Address
7643235678543	Fixed Physical Location	Manager	Ranki	Approved	China Wall-Tampa, FL, USA- 654322-Tampa-US

- Note: The screenshot below displays the Approval Notification you will receive once the Pickup Location has been approved.



Subject
Your pickup location for the company "Test" has been approved!

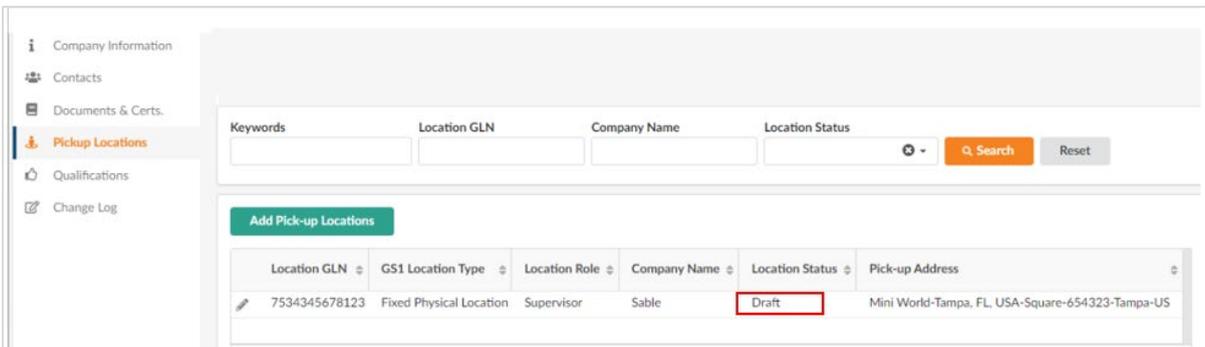
Message
Dear Test Contact

The pickup location address for the company "Test" has been approved successfully.

Regards,
GHSC-PSM

This is an automatically generated e-mail, please do not reply

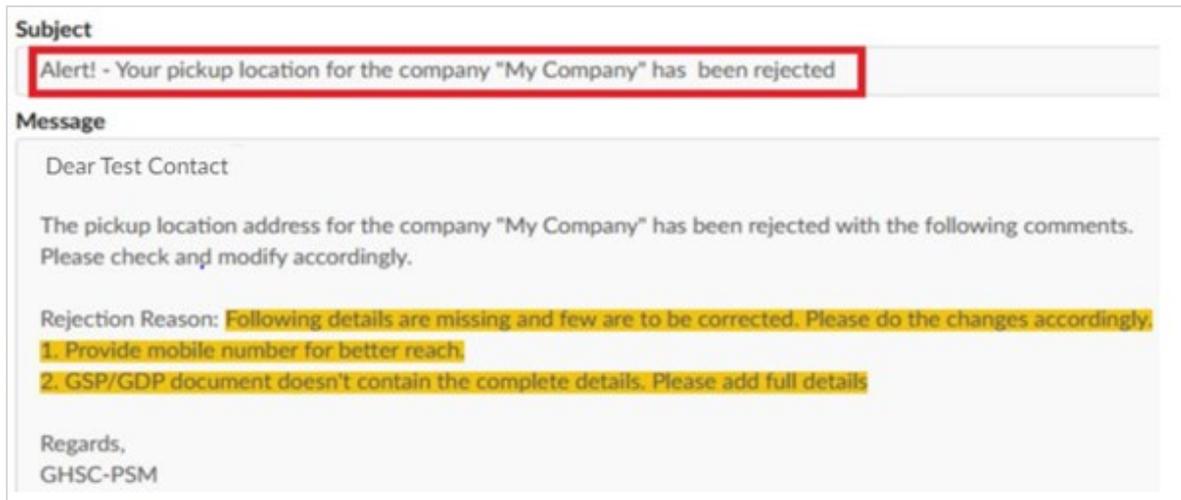
- If the Pickup location has been **rejected**, the status of the pickup location will again show in **Draft** status, and you will receive a Rejection Notification with the rejection reason. Based on that notification, make the necessary edits to the Pickup Location at the request of the PSM team.
- Note: The screenshot below displays the grid view of the pickup location in **Draft** status.



The screenshot shows a search interface with a sidebar on the left containing 'Pickup Locations' and a search bar with fields for Keywords, Location GLN, Company Name, and Location Status. Below the search bar is a table with the following columns: Location GLN, GS1 Location Type, Location Role, Company Name, Location Status, and Pick-up Address. A single record is displayed with the status 'Draft' highlighted in a red box.

Location GLN	GS1 Location Type	Location Role	Company Name	Location Status	Pick-up Address
7534345678123	Fixed Physical Location	Supervisor	Sable	Draft	Mini World-Tampa, FL, USA-Square-654323-Tampa-US

- Note: The screenshot below displays the Rejection Notification with Rejection Reason.

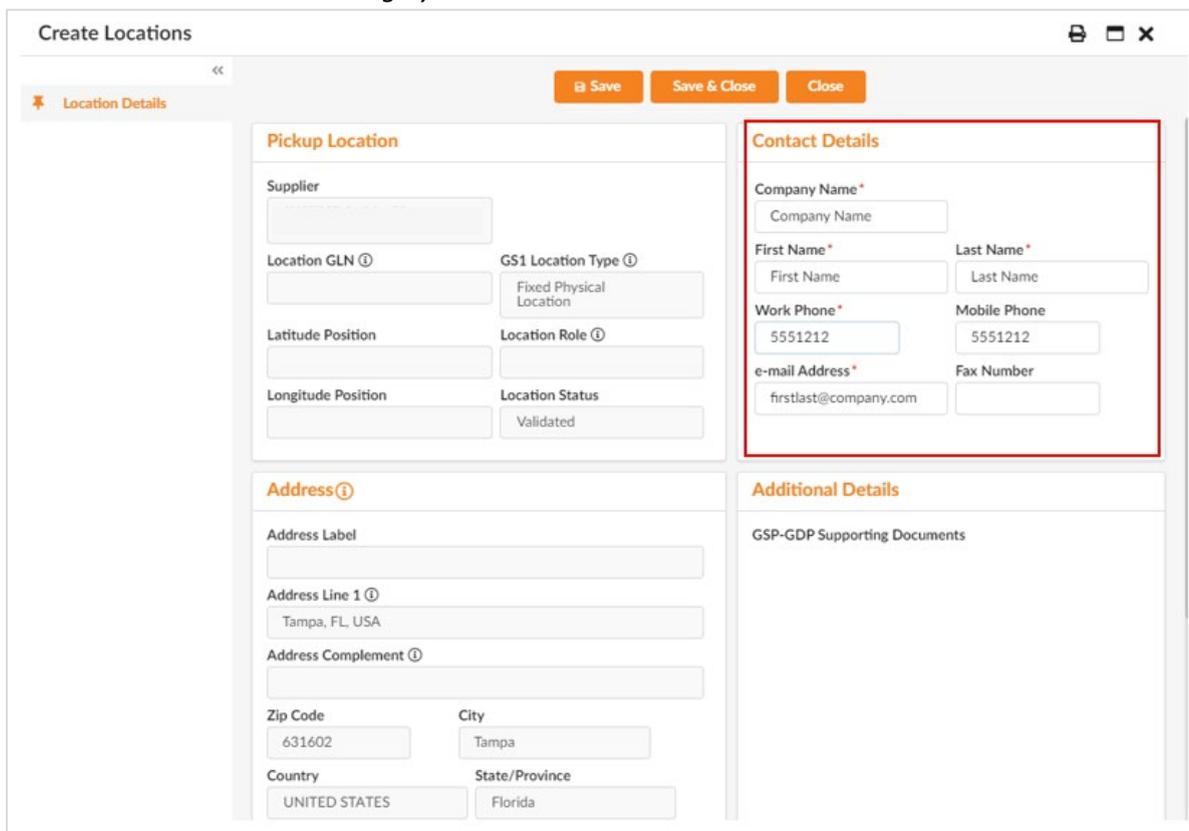


Edit Pickup Location Contact Details:

Once a Pickup Location is in a Valid status, only the Contact Details section is editable. This is due to the possible change to the Point of Contact with a valid Pickup Location.

Note: The Pickup Location, Address and Additional Details sections of the Pickup Location are NOT editable.

- To edit the Contact Details, select the **Pencil** icon to the left of the Pickup Location record.
 - Once selected, a pop-window opens, the **Contact Details** of the Pickup Location record can be edited.
- Note: Fields not editable will be greyed out and text cannot be entered.*



Note: To modify fields other than contact details, please create a new pickup location and submit a request for deletion of the existing pickup location.

Delete Pickup Location

If a pickup location is no longer valid, or there is a change in the address of the pickup location, please contact the PSM MIS Help Desk at psmmishelpdesk@ghsc-psm.org to submit a request for deletion of the existing pickup location. The PSM MIS Help Desk will update you once the request has been completed. While your request is pending, you can proceed with creating a new pickup location.

**USAID GLOBAL
HEALTH SUPPLY
CHAIN PROGRAM**

Procurement and Supply Management

1275 New Jersey Avenue SE, Suite 200
Washington DC 20003
United States