

Sourcing Overview

As a supplier, the Portal provides you with a central place to manage your business with the City of Mandurah. You can access your financial transactions, purchase orders, and contract summaries, update your contact and payment details, submit or update qualifications, respond to reviews, and track your quotes or tenders—all conveniently from one location.

Purpose

The purpose of this guide is to offer clear instructions on how to access financial transactions, purchase orders, and contract summaries; updating contact and payment information; submitting or revising qualifications.

My Supplier Details

Existing Suppliers who have a creditor account with the City of Mandurah.

Within My Accounts, you can update essential details like bank information and primary contacts, and view account balances, outstanding amounts, and transaction histories. The platform also lets you access payment summaries and review recent payments, giving you a clear overview of your organisation's financial details.

1. Expand the My Accounts function tile by clicking on the dropdown arrow. Information about each account you hold displays, so at a glance, you can determine what your account balances are, as well as total outstanding balance.
2. Once Account Details is showing, click on the account name to view details.
3. Click a bar on the graph to view transaction information. Here, you can view all the recent payments received, drilling down for further information.
5. Click Back Arrow to return to the payment summary.
6. Click on Payment Details, if any changes are required, click on the Request Change button. Simply fill out and then submit a form to ensure payment details are always correct and up to date.
7. Click Remittances. Click a remittance to open it. You can preview on screen and also reprint remittances from within My Accounts, which means you have access to these at any time from within the portal, without having to request them again.
8. Review the Contact Details, suppliers can update their contact information and manage who can access their portal.

 *At the completion of the steps below this will provide the recipient access to all transactions for the organisation.*

Click on My Accounts>Financial Accounts – *clear filter if filter is showing a red box with tick* 

Next, click on **View**>click on **Contact Details**>click on **Add Button** , choose the Address Type (i.e. General, Purchase Order, Cheques and Remittances, Recipient Invoices) – choose General for the Portal Invite>Enter the Description of the Address as Approach to Market, complete the remaining details and click save.

Notify the City of Mandurah accounts@mandurah.wa.gov.au that an additional email address has been added. A City representative will issue a portal invite to the email recipient.

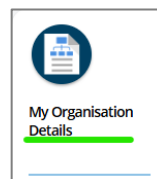
My Organisation Details

New Suppliers to the City of Mandurah.

Once you have completed your portal registration you can manage who has access to the portal in the “My Organisation Details”.

 *At the completion of the steps below this will provide the recipient access to all transactions for the organisation.*

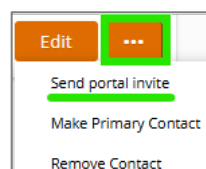
1. Click on My Organisation Details



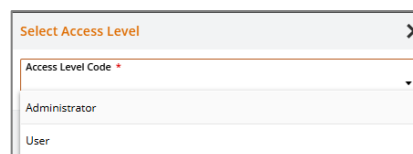
2. Click on Contacts>click on +Add Button, enter details of the person you are adding, click save.



3. Click on the 3 dots button and choose Send portal invite.



4. Choose the access level code from the drop-down list (i.e. Administrator or User)



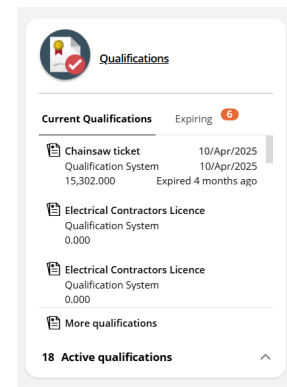
5. An email invitation with access link will be issued to the person you have added, they will need to activate their access, set a password etc, prior to accessing the account.

Add or Renew a Qualification

Suppliers can easily maintain and update their own qualifications to ensure they remain compliant with contract requirements.

1. Open up the Qualifications tile by clicking on the title.

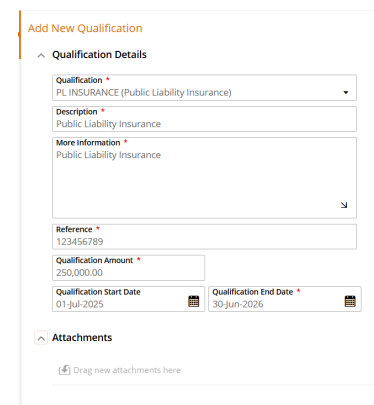
 *You can easily see which qualifications need reviewing by the number in red showing how many have expired.*



2. To add a new qualification, select “Add New Qualification.”
3. Use the drop down to select which qualification you wish to add.

If you cannot find the qualification in this list, please email tenders@mandurah.wa.gov.au for it to be added.

Fill in the required details, upload any attachments, and click “Save.”



4. If you want to renew a qualification you already have, find it in the list and click “Renew Qualification”
5. Enter any updated details, upload the new attachment and click “Save” to finish.