



Cardea Supplier Portal Guide

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Dashboard Alerts

Dashboard alerts allow you to select areas requiring action and act as a navigational shortcut in the system.

The screenshot shows the Cardea eProcurement dashboard in Internet Explorer. The top navigation bar includes links for Favorites, Cardea Live, Cardea Internet, Wax Helpdesk, UAT, Report Manager, Report Builder, Aquire, Umbraco, Procurement - Internet, Procurement Intranet, LOL, EDC, NHSCat, NHSSC-Reports, sid4health, ESR-InfoGov, and Discoverer. The main header displays 'UAT Cardea eProcurement' and 'Durham and Tees Valley NHS'. The left sidebar has links for Home, Document Administration, Returns Process, Company Administration, Catalogue Data, Catalogue Management, and PPQ Requests. The dashboard itself has a 'Welcome back AIDAPT User.' message and a 'Quick Links' section with a 'Catalogue Data' button. A 'Supplier Alerts' box is highlighted with a red oval, containing the following text:
You have 1 overdue order
You have 5 new orders to acknowledge
You have 81 orders passed for payment
You have 5 orders ready for invoicing

Click on the relevant alert to navigate to the required area of the system.



Acknowledge Orders

Signal willingness to supply goods in quantities requested

Orders Awaiting Acknowledgement - Windows Internet Explorer provided by CDDFT NHS Trust

File Edit View Favorites Tools Help

★ Favorites

Cardea Orders Awaiting Ackno... Dashboard

Application Supplier Portal Home Sign Out

UAT Cardea eProcurement Durham and Tees Valley NHS

Home Document Administration

Raise Credit Note Credit Notes Credit Note Requests

Rejected Credit Note Requests My Invoices Orders Ready for Invoicing

Acknowledge Orders (circled in red)

Acknowledged Orders Payments Received Blanket Orders

Returns Process Company Administration Catalogue Data Catalogue Management PPO Requests

Page 1 of 1 of 5 records returned.

Search For: Date: All Items per page: 50

View	Order No.	Seller Inv.	Date	Type	Status	Requisitioner	Trust	Supplier	Net Value	Gross Value
Select <input type="button" value="View"/>	RXP0000756469		23 Nov 2011	Purchase Order	New	Dave Hindson	COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST	AIDAPT	420.00	504.00
Select <input type="button" value="View"/>	RXP0000756470		23 Nov 2011	Purchase Order	New	Dave Hindson	COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST	AIDAPT	143.00	171.60
Select <input type="button" value="View"/>	RXP0000756468		23 Nov 2011	Purchase Order	New	Dave Hindson	COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST	AIDAPT	539.90	647.88
Select <input type="button" value="View"/>	RXP0000756462		23 Nov 2011	Purchase Order	New	Dave Hindson	COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST	AIDAPT	121.00	145.20
Select <input type="button" value="View"/>	RXP0000756460		22 Nov 2011	Purchase Order	Viewed	Dave Hindson	COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST	AIDAPT	21.90	26.28

Version: 4.4.321.970

Internet | Protected Mode: Off 100% 10:30

An email is sent to inform the Supplier that there is an order ready to be acknowledged.

You can either click the dashboard alert "**You have X new orders to acknowledge**" or go to Acknowledge order menu within the Document Administration Folder on the left hand side menu.

Click the 'Select' link against the order that you wish to acknowledge.

Any comments can be added in the Supplier's Comments box.

Select **Acknowledge Order** to supply requested quantities.



Amend an Acknowledged Order

Amend the order quantities or Freight Charges and send back to Procurement for approval

Orders Awaiting Acknowledgement - Windows Internet Explorer provided by CDDFT NHS Trust

File Edit View Favorites Tools Help

Favorites Cardea Live Cardea Internet Wax Helpdesk UAT Report Manager Report Builder Aquire Umbraco Procurement - Internet Procurement Intranet LOL EDC NHSCat NHSSC-Reports sid4Health ESR-InfoGov Discoverer

Cardea Orders Awaiting Ackno... Dashboard

Orders Awaiting Acknowledgement

Vendor Details

AIDAPT
AIDAPT
8 VICKAN WAY
NEW ADDINGTON
SURREY
CR0 0JG
Account No. AID005
VAT No.
Phone No. 01689 800820

Delivery Address

COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST
RECEIPT & DISTRIBUTION
UNIVERSITY HOSPITAL OF NORTH DURHAM
NORTH ROAD
DURHAM
DH1 5TW

Order No. RXP0000756469
Buyer's Ref Req.0000756466
Order Date 23 Nov 2011
Specific Type Normal
Status Viewed

Ordered By Dave Hindson
Contact Name Dave Hindson

Supplier's Comments

Delivery Date for all lines 24/11/2011

Reference	Line No	Line Status	Prod.	Desc.	Category	UOM	Qty	Remain.	Over.	Del.	Ret.	Inv.	Notes	Del. To	Del By	Unit Price	Currency	VAT%	Goods Total	Freight	Line Total
RXP0000756469	1	New	VR117_VR117_AID005	VR117 Bath Board	Equipment for Daily Living (GTB)	Each	10	0.00	0	0	0	0		DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	10.00	GBP	20.00	100.00	0.00	120.00
RXP0000756469	2	New	VR128_VR128_AID005	VR128 Bath Seat 8 Inch	Equipment for Daily Living (GTB)	Each	10	10.00	0	0	0	0		DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	13.00	GBP	20.00	130.00	0.00	156.00
RXP0000756469	3	New	VY438_VY439_AID005	VY438 Bed Grab Rail Contract Ref TA10/28	Equipment for Daily Living (GTB)	Each	10	10.00	0	0	0	0		DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	19.00	GBP	20.00	190.00	0.00	228.00

Net 420.00
VAT 84.00
Gross 504.00

Click the Select link against the order that you wish to acknowledge.

If you are unable to fill the complete order you can amend the qty you wish to despatch.

You can add Freight charge against each product line.

Please enter any amendment information in the Supplier's Comments box.

Select **Send Amendment** this will send the order back to the Procurement Dept for approval.



Price Amendment

Amend the Product Price and send back to the Procurement for approval

Screenshot of the 'Orders Awaiting Acknowledgement' page in Cardea eProcurement.

The page shows vendor details for AIDAPT and a delivery address for COUNTY DURHAM AND DARLINGTON NHS FOUNDATION TRUST. The order number is RXP0000756469, and the delivery date is 24/11/2011.

A red circle highlights the 'Supplier's Comments' text input field.

A red box highlights the 'Send Amendment' button in the top right corner.

The order details table shows three items:

Reference	Line No	Line Status	Prod.	Desc.	Category	UOM	Qty	Remain.	Over.	Del.	Ret.	Inv.	Notes	Del. To	Del By	Unit Price	Currency	VAT%	Goods Total	Freight	Line Total
RXP0000756469	1	New	VR117_VR117_AID005	VR117 Bath Board Contract Ref TA10/28	Equipment for Daily Living (GTB)	Each	10	10.00	0	0	0	0	0	DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	10.00	GBP	20.00	100.00	00.00	120.00
RXP0000756469	2	New	VR128_VR128_AID005	VR128 Bath Seat 8 Inch	Equipment for Daily Living (GTB)	Each	10	10.00	0	0	0	0	0	DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	13.00	GBP	20.00	130.00	00.00	156.00
RXP0000756469	3	New	VY438_VY439_AID005	VY438 Bed Grab Rail Contract Ref TA10/28	Equipment for Daily Living (GTB)	Each	10	10.00	0	0	0	0	0	DELIVERY LOCATION ONLY - R & D ~ UNIVERSITY HOSPITAL OF NORTH DURHAM	30/11/2011	19.00	GBP	20.00	190.00	00.00	228.00

Supplier's Comments:

Delivery Date for all lines:

Send Amendment

Click the Select option against the relevant order line.

Enter unit price in Supplier's Comments Box.

Select this will send the order back to Procurement for approval.

Once approved and updated by Procurement an invoice can be entered against the order.

Once the goods have been receipted on Cardea, the invoice is immediately available for payment.



Invoicing

Ability to manually enter an invoice against an order.

Invoice Builder - Windows Internet Explorer provided by CDDFT NHS Trust

File Edit View Favorites Tools Help

★ Favorites

Cardea Dashboard

Application Supplier Portal Home Sign Out

UAT Cardea eProcurement Durham and Tees Valley NHS

Document Administration

All Order Lines Fully Received Orders Partially Received Order Lines Acknowledged orders

Page 1 of 1 of 5 records returned.

Search For: Date: All Items per page: 50

Update Invoice Basket

View	Reference	Supplier	Description	Part No.	Total	Line No.	Date	Delivery Date	Type	Status	Line Status	Requisitioner	Trust	Buyer Location	Quantity	Quantity Delivered	Quantity Pending
	View SJ90000716880 AIDAPT	VR161 Static Commode Contract Ref T...	VR161_VR161_AID005	1,188.00	1	31 Mar 2011	06 Apr 2011	Purchase Order	Acknowledged	Acknowledged	Kevin Lincoln	COUNTY DURHAM AND DARLING...	RRR HELS STOCK EQUIPMENT PURCHASE DURHAM & CLS PCT	60.00	0.00	0	
	View SJ90000713586 AIDAPT	VG837 Parching Stool Contract Ref T...	VG837_VG837_AID005	1,080.00	1	29 Mar 2011	05 Apr 2011	Purchase Order	Received	Received	Kevin Lincoln	COUNTY DURHAM AND DARLING...	RRR HELS STOCK EQUIPMENT PURCHASE DURHAM & CLS PCT	60.00	60.00	0	
	View SJ90000704619 AIDAPT	VR117 Bath Board Contract Ref TA10/...	VR117_VR117_AID005	600.00	2	21 Mar 2011	25 Mar 2011	Purchase Order	Received	Received	Kevin Lincoln	COUNTY DURHAM AND DARLING...	RRR HELS STOCK EQUIPMENT PURCHASE DURHAM & CLS PCT	50.00	50.00	0	
	View SJ90000704619 AIDAPT	VG837 Parching Stool Contract Ref T...	VG837_VG837_AID005	900.00	1	21 Mar 2011	25 Mar 2011	Purchase Order	Received	Received	Kevin Lincoln	COUNTY DURHAM AND DARLING...	RRR HELS STOCK EQUIPMENT PURCHASE DURHAM & CLS PCT	50.00	50.00	0	
	View SJ90000705157 AIDAPT	VR222 Raised Toilet Seat 2 Inch Con...	VR222_VR222_AID005	297.00	2	21 Mar 2011	28 Mar 2011	Purchase Order	Received	Received	Kevin Lincoln	COUNTY DURHAM AND DARLING...	RRR HELS STOCK EQUIPMENT PURCHASE DURHAM & CLS PCT	50.00	50.00	0	

1

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Internet Protected Mode: Off 100% 10:50

An email is sent to the Supplier stating there is an order ready for Invoicing.

You can either select the dashboard alert "**You have X new orders ready for Invoicing**" or go to 'Orders ready for Invoicing' link located within the Document Administration Folder on the left hand side menu.

Place a tick against the order lines that you wish to create an invoice for.

Click .

Click Tab.



Invoicing Cont.

Invoice Address
COUNTY DURHAM AND DARLINGTON
COMMUNITY HEALTH SERVICES
FINANCE DEPT - SHARED SERVICES
HENSON CLOSE
SURFORD CHURCH ENTERPRISE PARK
BISHOP AUCKLAND
DL14 6WA

Vendor Details
AIDAN
VULCAN HOUSE
5 VULCAN WAY
NEW ADDINGTON
SURREY
CR0 9UG
Account No.: AID005
VAT No.:
Phone No.: 01603 800820

PO Number:	5390000716880	Net Total:	990.00	To be invoiced:	1188.00
Invoice No.		990.00			
Invoice Date	24/11/2011	198.00			
Net Total.		1188.00			
VAT Total.					
Gross Total.					

Enter your company Invoice Number and Invoice date.

A note can be added in the Vendor Notes Box.

Select **Proceed to Invoice**.



Invoicing Cont.

Invoice Builder - Windows Internet Explorer provided by CDDFT NHS Trust

File Edit View Favorites Tools Help

Star Favorites Cardea Live Cardea Internet Wax Helpdesk UAT Report Manager Report Builder Acquire Umbraco Procurement -Internet Procurement Intranet LOL EDC NHSCat NHSSC-Reports sid4health ESR-InfoGov Discoverer

Cardea Invoice Builder Dashboard

Application Supplier Portal Home Sign Out

UAT Cardea eProcurement Durham and Tees Valley NHS

Home Document Administration Returns Process Company Administration Catalogue Data Catalogue Management PPQ Requests

Invoice Builder

All Order Lines Fully Received Orders Partially Received Order Lines Acknowledged orders Invoice Basket (1) Invoice

Hide/Unhide

Vendor Details

VULCAN HOUSE
5 VULCAN WAY
NEWCASTLE UPON
Tyneside
SURREY
CR0 9UG
Account No. AID005
VAT No.
Phone No. 01689 800820

Invoice Address

COUNTY DURHAM AND DARLINGTON COMMUNITY HEALTH SERVICES
FINANCE DEPT - SHARED SERVICES
HENSON CLOSE
SOUTH BURNCHURCH ENTERPRISE PARK
BISHOP AUCKLAND
DL14 6WA

Invoice No.: 123554
Invoice Date: 24 Nov 2011
VAT No.:

Customise

Reference	PO.	Line No.	Line Status	View Matching Details	Prod.	Desc.	Qty	Remain	Value Invoiced	Over.	Del.	Credits	Cred Rqs.	Creds	Ret.	Ret Rqs.	Inv.	Invoicable	Notes	Unit Price	Currency	VAT%	Goods Total	Line Total
123554	5J90000716880	1	New	View	VR161_VR161_AID005	VR161_Static Command Contract Ref TA10/28	60	60	0.00	0	0	0	0	0	0	0	0.00	0	16.50	GBP	20.00	990.00	1,188.00	

Net 990.00
VAT 198.00
Gross 1,188.00

[Confirm Invoice](#) [Amend Invoice](#)

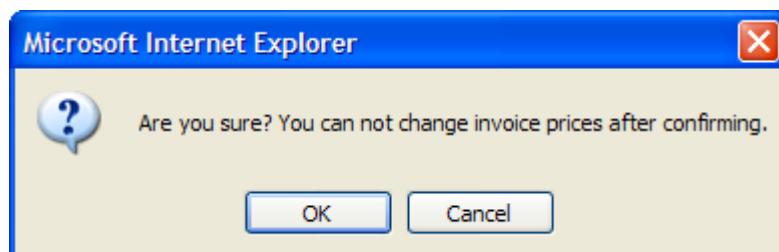
Version: 4.4.321.970

Done Internet | Protected Mode: Off 10:55

Select [Confirm Invoice](#) if the quantity you wish to invoice is correct, otherwise select [Amend Invoice](#) and change the quantity.

Select [Recalculate Invoice](#).

Select [Confirm Invoice](#).





Raise a Credit Note

Raise Credits - Windows Internet Explorer provided by CDDFT NHS Trust

File Edit View Favorites Tools Help

★ Favorites

Cardea Raise Credits

Raise Credits

Vendor Details

AIDAN'S
VULCAN HOUSE
5 VULCAN WAY
NEW ADDINGTON
SURREY
CR0 1LG
Account No.: AID005
VAT No.:
Phone No. 01689 800820

Invoice Address

COUNTY DURHAM AND DARLINGTON COMMUNITY HEALTH SERVICES
FINANCIAL & SHARED SERVICES
HENSON CLOSE
SOUTH CHURCH ENTERPRISE PARK
BISHOP AUCKLAND
DL14 6WA

Credit Note No. (Red circle)

Credit Note Date: 24/11/2011 (Red circle)

Invoice No.: 7895644

VAT No.:

Internal Comments:
purchase for social service | SJ9KLINCOLN (21/03/2011 09:27)

External Comments:

Items Table

Reference	PO.	Line No.	Line Status	Prod.	Desc.	Qty	Remain.	Value Invoiced	Del.	Credits	Cred Rqs.	Creds	Ret.	Ret Rqs.	Inv.	Credit	Notes	Unit Price	Currency	VAT Code.	VAT Desc.	VAT%	Goods Total	Credit Reason	Credit Value
Inv317431	5J90000705157	1	Ready_For_Payment	VB638W_VB638W_AID005	VB638W Basic Shower Stool Contract Ref TA10/28	10	0	500.00	10	0	0	View	0	0	10.00	(Red circle)	50.00	GBP	S	STANDARD RATE	20.00	500.00	** Select Reason **	(Red circle)	
Inv317431	5J90000705157	2	Ready_For_Payment	VR223_VR223_AID005	VR223 Raised Toilet Seat 4 Inch Contract Ref TA10/28	50	0	247.50	50	0	0	View	0	0	50.00		4.95	GBP	S	STANDARD RATE	20.00	247.50	** Select Reason **		

Net
VA
Gross

Submit (Red circle)

Windows Internet Explorer 4.4.321.070

Internet | Protected Mode: Off

100% 11:03

Click the 'Raise Credit Note' link within the Document Administration Menu.

Select against the invoice you wish to raise the credit against.

Enter Credit Note Number and date.

Enter the Quantity you are returning in the Credit box.

Or enter a monetary value in the Credit Value box.

Click the drop down arrow to select the reason for the Credit.

Select