

# Supplier Portal

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Enterprise Systems & Processes



# Document Reviews

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Changes	Date
Original document	22-Mar-2021
Update: accounted invoice notification, possibility of exporting invoices uploaded to a file	05-Oct-2021
Update: modification and deletion of invoices, password configuration details, explanation of decimals in tax base	30-Nov-2021
Update: new Help tab	12-Feb-2022

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# Target

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Web Portal utilities to perform:

1. Queries of orders placed and existing invoices
2. Communication of new invoices.

# User login

## Access and password recovery

How to access:

1. Access: <https://my.evolutio.com/>
2. Inform User/Password provided by Evolutio
3. Click en Acceder
4. Change password provided: **must have at least 8 characters, between them there must be an uppercase letter, a lowercase letter, a number and a non-alphanumeric character**



How to recover the password:

1. Click on “Forgot your password?”
2. Inform Username provided by Evolutio and your Email
3. Click on “Reset”
4. Reception of new password in Email



# Portal - description

## Main screen options

The screenshot shows the Evolutio portal interface. At the top right, there is a user profile 'admin admin' and a dropdown menu with options: 'Supplier Management', 'Change password', and 'Log out'. The main navigation bar includes 'evolutio' logo and 'Home > Orders/Invoices'. A left sidebar menu is expanded to show 'Orders/Invoices' with sub-items: 'Purchase orders', 'Invoices/Payments', 'Loaded invoices', 'Exchange area', 'Profile', and 'Terms and conditions'. The main content area is titled 'Solutions' and features a grid of six service cards: 'Dynamic networks', 'Cloud Enablement', 'Cybersecurity', 'Applications', 'Digital Experience', and 'IA and Big Data'. At the bottom, there is a privacy notice and a 'Cloud Service' logo.

**Order Display** (Callout pointing to 'Purchase orders')

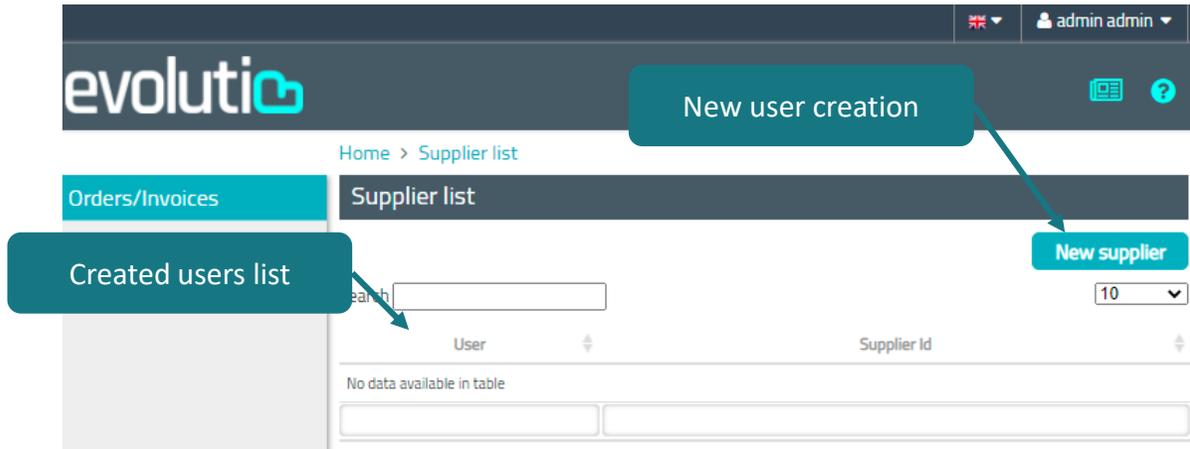
**Invoice Display** (Callout pointing to 'Invoices/Payments')

**New Invoices** (Callout pointing to 'Loaded invoices')

**User Administration** (Callout pointing to the user dropdown menu)

# User Administration

## User management



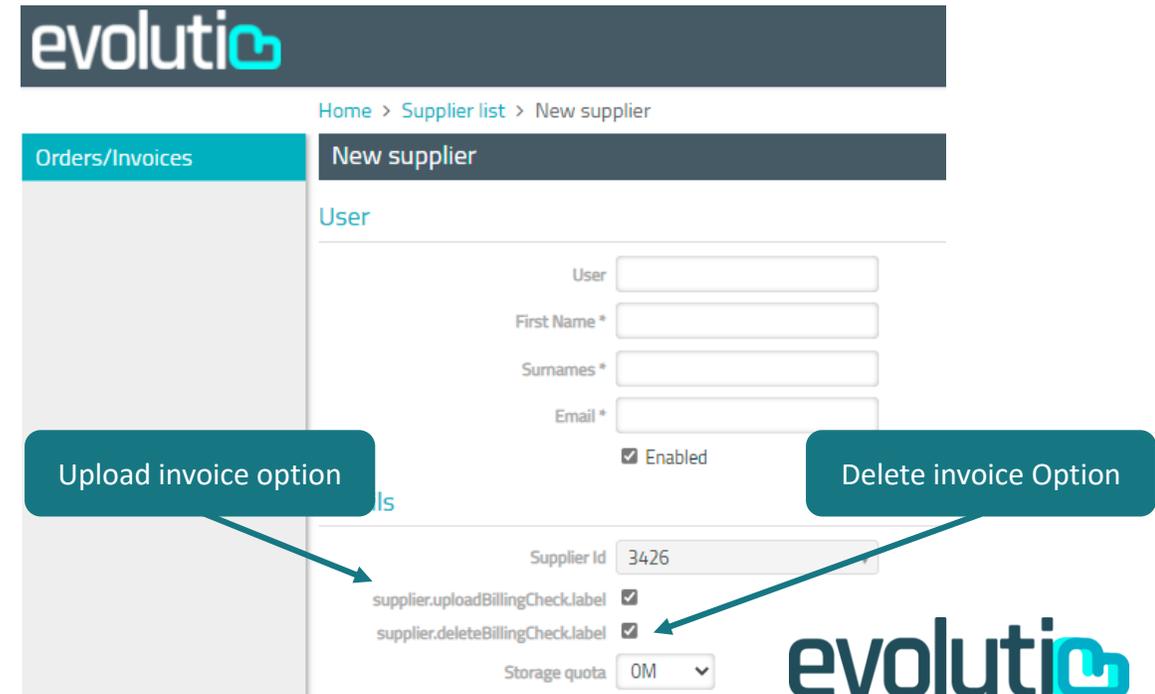
To create a new user it will be necessary to inform a user login, name, surname and contact email.

The “Enabled” option must be checked for the user to be active.

If we want the user to only be able to view, we must uncheck the option “Upload invoice” and “Delete invoice”. If we want you to be able to load and delete invoices, these options must be checked.

The administrator user will have the ability to create new users within their organization with 2 permission levels:

1. Only display and modification of invoice fields (except invoice number field and pdf file)
2. Permission to view, upload new invoices and delete uploaded invoices as long as they have not been accounted



# User Administration

## Password

New password must have **at least 8 characters**, between them there must be **an uppercase letter, a lowercase letter, a number and a non-alphanumeric character**

Old Password

New Password

Change password

User  
admin3426

Current password

New password

Confirm new password

< Back Update



# Order Display

Invoices related to a purchase order

The screenshot displays the Evoluti web application interface for viewing purchase orders. At the top, there is a navigation bar with the Evoluti logo and a breadcrumb trail: Home > Orders/Invoices > Purchase orders. Below this, there are three tabs: Purchase orders (active), Invoices and payments, and Loaded invoices. A 'Purchase order:' section contains a row of buttons for field customization: Order, Position, Order date, Material, Order description, Quantity, Amount, Received quantity, Billed quantity, Billed amount, and Evolutio customer. Below this is a table with columns corresponding to these fields. A callout box labeled 'Exporting information to a file' points to an 'Export' button on the right. Another callout box labeled 'Field Customization' points to the row of buttons. A third callout box labeled 'Person in charge of receiving purchase orders' points to the 'Evolutio manager' column in the table. A fourth callout box labeled 'Purchase Orders List' points to the table area, which currently shows 'No data available in table'.

Purchase Order Information available: number, positions, date, description, quantity, amount, etc.).

Responsible Evolutio: contact in charge of receiving purchase orders

Possibility of customizing the columns to show in the view, activating or deactivating fields.

Possibility of exporting information to a file.

**IMPORTANT:** new orders will appear 24-48 hours after their creation. So we must wait this time to be able to load an invoice linked to a new order.

# Invoice Display

## Invoice related/not related to a purchase order

- Information available on accounted invoices (reference, type, date, amount, payment conditions etc.).
- Possibility of customizing the columns to show in the view, activating or deactivating fields.
- Possibility of exporting information to a file.

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Home > Orders/Invoices > Invoices/Payments

Purchase orders Invoices and payments Loaded invoices

Invoices and payments

Export

Reference Invoice type Document date Amount Collection condition Expiration date Paid from Payment date Order Reason Invoice Invoice description

10

Reference Invoice type Document date Amount Collection condition Expiration date Paid from Payment date Order Reason Invoice Invoice description

No data available in table

Exporting information to a file

Field Customization

List of invoices

# New Invoices (I)

## Loaded Invoices

Exclusive window for registering the invoices that have been communicated from the portal, it does not show those that have been sent by an alternative method (email invoiceproveedores@evolutio.com). Includes button to communicate new invoices (users with corresponding permission).

List of invoices uploaded to the portal with their status (Not accounted, Accounted and Incorrect). When an invoice goes to accounted status, you will be notified by mail.

Home > Orders/Invoices > Loaded invoices

Purchase orders Invoices and payments **Loaded invoices**

Loaded invoices

Export Upload Invoice

Supplier ID Name Request code Document Type Invoice Date Invoice Number Tax Base Tax Type VAT/IGIC % VAT/IGIC Import IRPF Type IRPF % IRPF Import Status Description Purchase Order Ref. Month of Use File

No data available in table

Invoice ID portal

Invoice Number

Status of Invoice

# New Invoices (II)

## Invoice Form (related to a Purchase Order)

The screenshot shows the 'Nueva factura' form in the Evolutio system. The form is divided into two columns of input fields. The left column includes: 'Id Proveedor' (text input), 'Tipo Documento \*' (dropdown menu), 'N° Factura \*' (text input), 'Tipo de Impuesto \*' (dropdown menu), 'Importe IVA/IGIC \*' (text input), and 'Pedido \*' (checkbox list). The right column includes: 'Nombre' (text input), 'Fecha Factura \*' (text input), 'Base Imponible \*' (text input), '% IVA/IGIC \*' (dropdown menu), 'Tipo IRPF' (dropdown menu), 'Importe IRPF' (text input), and 'Comentarios' (text area). At the bottom, there is a table header with columns: 'Tipo', 'Path', 'Descripción', 'Fecha', and 'Propietario'. Below the header is a table with one empty row. A 'Crear' button is located at the bottom right. Annotations include a teal box labeled 'Purchase Orders' pointing to the 'Pedido \*' dropdown, a teal box labeled 'File in pdf format' pointing to the 'Añadir adjunto' button, and a teal box labeled 'Añadir adjunto' pointing to the 'Añadir adjunto' button.

**Purchase Orders**

**File in pdf format**

**Añadir adjunto**

**Crear**

Data to inform:

- Document type: invoice or payment
- Invoice date
- Invoice number
- Tax basis. **Important, decimals are indicated with a point, not a comma, and you do not have to use a thousands separator.**
- Tax type: VAT or IGIC
- % VAT/IGIC
- IRP type and % IRPF (if applicable)
- Order: order number associated with the invoice to be communicated, orders that have been received are shown in green, and those that are not are shown in red. For it to change from red to green, contact the Evolutio Manager to confirm the receipt of goods. **The status of purchase orders takes 24-48 hours to update on this list.**
- Comments
- Attach invoice file in pdf format

When all the fields are filled in and the invoice is attached, by clicking on the create button, the invoice is registered in the initial status "Not accounted". When the uploaded invoice appears in the "Invoices and Payments" tab, its status will change to "Accounted". If it is decided to delete because the pdf or the invoice number is not correct, the status will be "Incorrect".

# New Invoices (III)

Invoice Form (not related to a Purchase Order)



New invoice

Supplier ID	Name
<input type="text"/>	<input type="text"/>
Document Type *	Invoice Date *
<input type="text" value="Select one..."/>	<input type="text"/>
Invoice Number *	Tax Base *
<input type="text"/>	<input type="text"/>
Tax Type *	VAT/IGIC % *
<input type="text" value="Select one..."/>	<input type="text" value="Select one..."/>
VAT/IGIC Import *	IRPF Type
<input type="text"/>	<input type="text" value="Select one..."/>
IRPF %	IRPF Import
<input type="text" value="Select one..."/>	<input type="text"/>
Description	
<input type="text"/>	

File in pdf format

Attachments

Type	Path	Description	Date	Owner
<input type="button" value="Add attachment"/>				
<input type="button" value="Create"/>				

Data to inform:

- Document type: invoice or payment
- Invoice date
- Invoice number
- Tax basis. **Important, decimals are indicated with a point, not a comma, and you do not have to use a thousands separator.**
- Tax type: VAT or IGIC
- % VAT/IGIC
- IRP type and % IRPF (if applicable)
- Comments (if applicable)
- Attach invoice in pdf format

When all the fields are filled in and the invoice is attached, by clicking on the create button, the invoice is registered in the initial status "Not accounted". When the uploaded invoice appears in the "Invoices and Payments" tab, its status will change to "Accounted". If it is decided to delete because the pdf or the invoice number is not correct, the status will be "Incorrect".



# New Invoices (IV)

## Pay Per Use Invoice Form



### New invoice

Supplier ID	Name
<input type="text"/>	<input type="text"/>
Document Type *	Invoice Date *
Select one... ▼	<input type="text"/>
Invoice Number *	Tax Base *
<input type="text"/>	<input type="text"/>
Tax Type *	VAT/IGIC % *
Select one... ▼	Select one... ▼
VAT/IGIC Import *	IRPF Type
<input type="text"/>	Select one... ▼
IRPF %	IRPF Import
Select one... ▼	<input type="text"/>
invoice reference month 10/2021	Description
<input type="text"/>	<input type="text"/>

Month to which the invoice refers

### Attachments

Type	Path	Description	Date	Owner

File in pdf format

Data to inform:

- Document type: invoice or payment
- Invoice date
- Invoice number
- Tax base: **Important, decimals are indicated with a point, not a comma, and thousands separators must not be used.**
- Tax type: VAT or IGIC
- % VAT/IGIC
- IRP type and % IRPF (if applicable)
- Invoice reference month
- Comments (if applicable)
- Attach invoice in pdf format

When all the fields are filled in and the invoice is attached, by clicking on the create button, the invoice is registered in the initial status "Not Accounted". When the uploaded invoice appears in the "Invoices and Payments" tab, its status will change to "Accounted". If it is decided to delete because the pdf or the invoice number is not correct, the status will be "Incorrect".



# Changes in Loaded Invoices

## Invoice record fields edition

The screenshot shows a web interface for managing 'Loaded invoices'. At the top, there are buttons for 'Export' and 'Upload Invoice'. Below these are several filter buttons for various fields: Tipo Documento, Fecha Factura, N° Factura, Base imponible, Tipo de Impuesto, % IVA/IGIC, Importe IVA/IGIC, Tipo IRPF, Descripción, Pedido, Mes referencia uso, and Fichero. A dropdown menu is set to '10'. The main table has columns: Fecha, N° Factura, Base, Tipo de, %, Importe, Tipo, %, Importe, Estado, Descripción, Pedido, Mes, Fichero, and Acciones. The 'Estado' column contains values like 'Contabilizada' and 'No contabilizada'. The 'Acciones' column contains a pencil icon for editing. Two callouts are present: one pointing to the 'No contabilizada' status in the 'Estado' column, and another pointing to the pencil icon in the 'Acciones' column.

Fecha	N° Factura	Base	Tipo de	%	Importe	Tipo	%	Importe	Estado	Descripción	Pedido	Mes	Fichero	Acciones
Factura		imponible	Impuesto	IVA/IGIC	IVA/IGIC	IRPF	IRPF	IRPF			referencia	referencia		
20/09/2021	20083,199	IVA							No contabilizada				10.pdf	
20/09/2021	3947,2	IVA	21	828,912		0			Contabilizada		4500124018		12.pdf	
21/10/2021	6094,4	IVA	21	1279,824		0			Contabilizada		4500123810		34.pdf	
21/10/2021	3587,2	IVA	21	753,312		0			Contabilizada		4500124405		35.pdf	
26/11/2021	1210,2	IVA	21	254,142		0			No contabilizada		4500124554		33.pdf	
26/11/2021	12015,2	IVA	21	2523,192		0			No contabilizada		4500124389		34.pdf	
26/11/2021	9508	IVA	21	1996,68		0			No contabilizada		4500124519		85.pdf	

It is only possible to modify certain fields of the uploaded invoices if they have not yet been accounted (Status = Not Accounted).

It is not possible to modify the Invoice No. field or change the pdf file of the invoice if we use this option, the rest of the fields can.

When the fields are modified and the record is saved, a notification of the change is sent to the Evolutio team in charge of managing the invoices.

# Deletion of Loaded Invoices

## Errors in file or invoice number

Loaded invoices

Export Upload Invoice

Documento Fecha Factura N° Factura Base imponible Tipo de Impuesto % IVA/IGIC Importe IVA/IGIC Tipo IRPF % IRPF

Mes referencia uso Fichero

Before  
Status = Not Accounted  
After:  
Status = Incorrect

N° Factura	Base imponible	Tipo de Impuesto	% IRPF	Estado	Descripción	Pedido	Mes referencia	Fichero uso	Acciones
445	IVA 10 44,5	IRPF Profesional 15	80,25	Contabilizada		4500107503		is2.pdf	
567	IVA 10 56,7	IRPF Profesional 15	85,05	Contabilizada					
3000	IVA 10 300	IRPF Alquileres 19	570	Incorrecta					
123123	IVA 4 4924,92	IRPF Profesional 15	18468,449	Incorrecta		4500108985		is.pdf	
456776	IVA 10 45677,602		0	Incorrecta		4500109054			
1234,02	IVA 10 123,402		0	No contabilizada		4500113609		if	
1112223	IGIC 7 77855,609	IRPF Profesional 15	166833,453	No contabilizada		4500112996		if	
234	IVA 21 49,14		0	Incorrecta	qqqqqqqqqqqqqqqqqqqqqqqqqqqqqq	4500113588		2.pdf	

Delete Icon

It is only possible to delete uploaded invoices if they are not yet accounted (Status = Not Accounted).

It is used when the file is wrong or the invoice number is incorrect

When the uploaded invoice is deleted from the delete icon and the record is saved, a notification is sent to the Evolutio team in charge of managing the invoices and the status of the invoice changes to "Incorrect".

# Help Tab

## Guides, FAQs, Inquiries

Home > Operations > Suppliers > Help

Purchase orders

Invoices and payments

Loaded invoices

Help

### User guide

- Spanish User Guide
- English User Guide

Download to consult the manuals of the portal in Spanish and English

### FAQ

#### Password locked?

Before entering the portal, click on "Forgot your password?" Inform Username provided by Evolutio and its a not to include spaces or other characters.

#### Problems creating the new password?

It must have at least 8 characters, between them there must be an uppercase letter, a lowercase letter, a nu

#### They just created the order and I can't find it to associate an invoice

New orders will appear 24-48 hours after their creation. That is, we must wait this time to be able to load an

#### They just received my order but it still appears in red in the dropdown

The update on the portal will take place 24-48 hours after receipt.

#### The order associated with the invoice is in red in the dropdown, can I still upload the invoice?

Yes, it does not limit the load of the invoice. The notice indicates that you need to contact the person in charg disappears 24-48 hours after receiving the order.

#### I have informed an amount in Taxable base but it is not calculating the corresponding tax.

Decimals are indicated with a point, not a comma, and thousands separators must not be used.

#### I need to modify some data of the loaded invoice.

Invoice data can only be modified in the portal (except the invoice reference and the pdf file itself) if the invoic the changes and a notification will be sent to the responsible team.

#### I have uploaded an invoice with an incorrect reference or pdf file

An invoice can only be deleted in the portal if the invoice is not accounted for (indicated in the Status field of t

Answers to the most common questions about the portal

### Send Inquiries

Inquiry Type

Select one... ▼

Indicate Order/Invoice

Inquiry Description

Sending inquiries about orders, invoices, problems

Help:

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Contact: [consultaproveedores@evolutio.com](mailto:consultaproveedores@evolutio.com)



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