

VENDOR PORTAL

User Guide

UNITED STATES
PATENT AND TRADEMARK OFFICE



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Part ONE

Introduction

Welcome to Vendor Portal

What is Vendor Portal?

The USPTO Vendor Portal is a secure web-based service to provide more efficient information flow between the USPTO and our vendor community. The Vendor Portal provides vendors with the ability to manage invoice and deliverable submission electronically as well as obtain status of payments and other pertinent information on your awards.

With Vendor Portal access, you can:

- **Submit Invoices:** Submit your invoices electronically and receive confirmation and status of payments
- **Submit Contract Deliverable(s):** Submit your contract deliverables electronically including contractor actuals deliverables and receive confirmation and status of receipt. For contractor actuals, there are additional system built in validations to ensure all errors are identified prior to submission
- **View Contract Information:** Provides vendor(s) access contract information with the USPTO

Getting Started with Vendor Portal

Request your Vendor Portal account

To access the Vendor Portal, vendors will need to follow the registration instructions detailed on the USPTO Vendor Information site to request an account. Vendors will be required to coordinate an account request that must be submitted by the Electronic Business POC established for their organization in SAM.gov. Vendor users may request various account types based on their expected roles from the organization's master admin if one has already been established in the system. A Vendor Portal account is established once a user confirms and activates their account via an email invitation.


1. Navigate to the uspto.gov 'Vendor Information' page: <https://www.uspto.gov/about-us/vendor-information>
2. On the [Vendor Information page](#), navigate to the 'Vendor Invoices' section and click the 'Vendor Portal Information'.
3. There are two ways vendor users may request a Vendor Portal account:
 1. *Vendors may coordinate establishing their first Vendor Portal account for the organization by following the registration instructions detailed on the USPTO Vendor Information Page < <https://www.uspto.gov/about-us/vendor-information/vendor-portal-information>>*

Once the Vendor's registration details are submitted by the company's Electronic Business POC registered in SAM, the help desk will review the request. Once the required details are validated, the Electronic Business POC will be administered the company's first master admin account. They will receive an email invitation to register and confirm their Vendor Portal account. (Refer to step 4 on registering your account via email invitation)

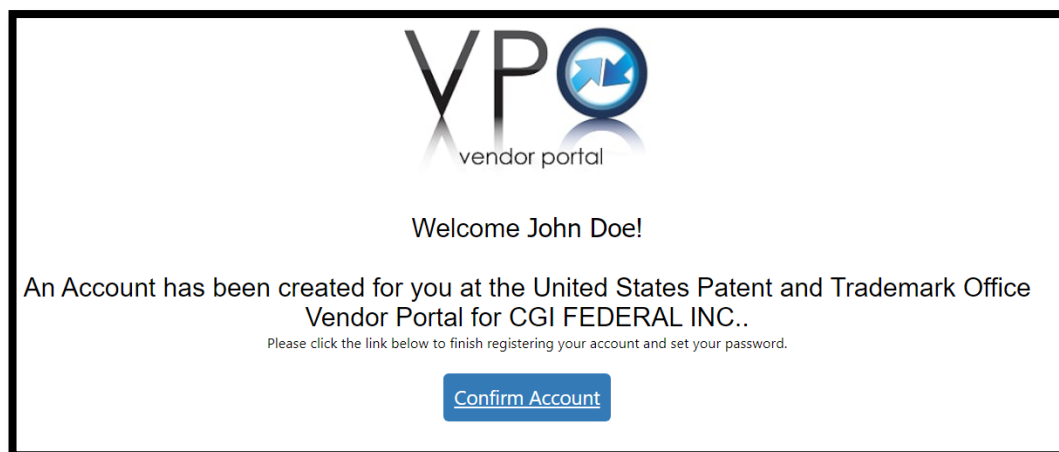
2. *Vendor users may request a Vendor Portal account through their organization's master admin established in the Vendor Portal*


If your organization has a master admin account established in the Vendor Portal and you have their contact, you may reach out to request an account to be provided. Once the master admin validates the user requesting an account, the master admin will login to the Vendor Portal to administer the account. The requesting user will receive an email invitation to register and confirm their Vendor Portal account. (Refer to step 4 on registering your account via email invitation)

If a vendor user is unsure whether their organization has a master admin established, they may follow the steps to have the organization's Electronic Business POC register for a master admin account. If it turns out that your organization has an established master admin once the registration is submitted, the Vendor Portal registration helpdesk will forward your account request to the established master admin in the system. The master admin will reach out to the requesting user to establish a user account. Please note that the Vendor Portal help desk will not directly provide the master admin's contact details to any requesting users due to security and privacy considerations. If the master admin is able to validate the user requesting an account, the master admin will administer the account through Vendor Portal. The requesting user will receive an email invitation to register and confirm their Vendor Portal account. (Refer to step 4 on registering your account via email invitation)

4. To complete the registration of a Vendor Portal user account, check your email for an account invitation. Click the 'Confirm Account'  button to complete the creation of your Vendor Portal account.

Below is a screenshot of the Vendor Portal welcome screen, displaying the 'Confirm Account' button.

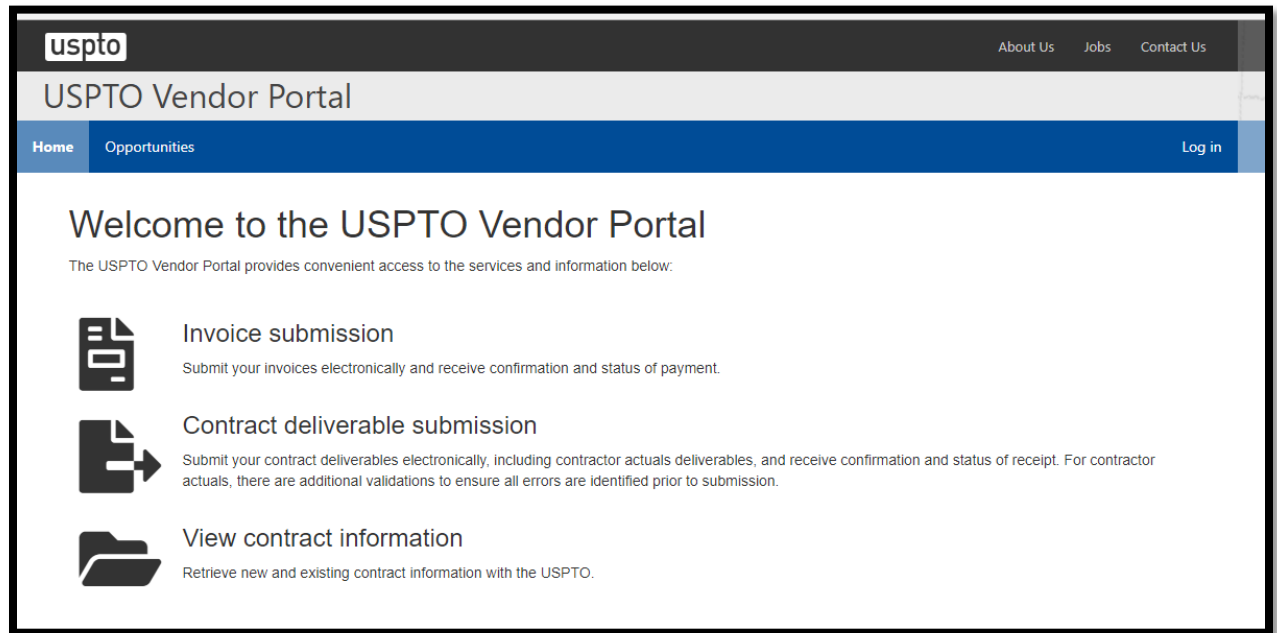



5. Complete the creation of your account by confirming a password and setting your security question and answer. Click the 'Set'  to finalize the account creation.

Sign in to Vendor Portal

1. Navigate to the Vendor Portal homepage using this link:
<https://vendors.uspto.gov/VendorPortal>

Below is an image of the USPTO Vendor Portal Homepage



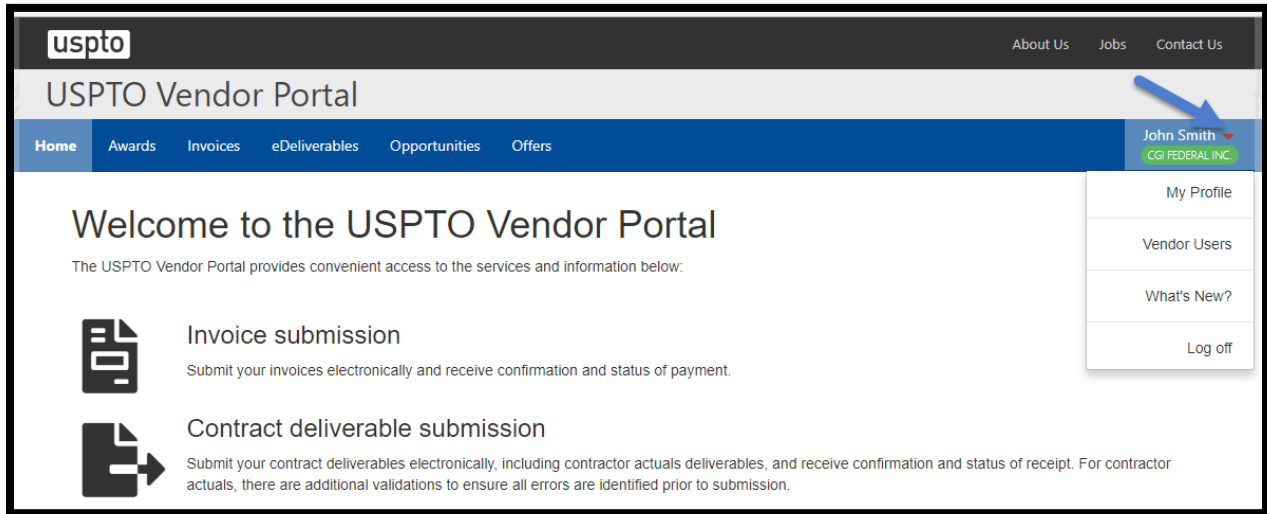
2. Click 'Log in' at the upper right hand corner, entering the email address and password associated with your Vendor account.
3. Select the 'Log in'  button at the upper right hand corner of the page. This will take you to the USPTO Vendor Portal, and default to 'Awards' that are owned by your vendor.

Vendor Portal Profile

The following steps can be used to view and modify your user profile:

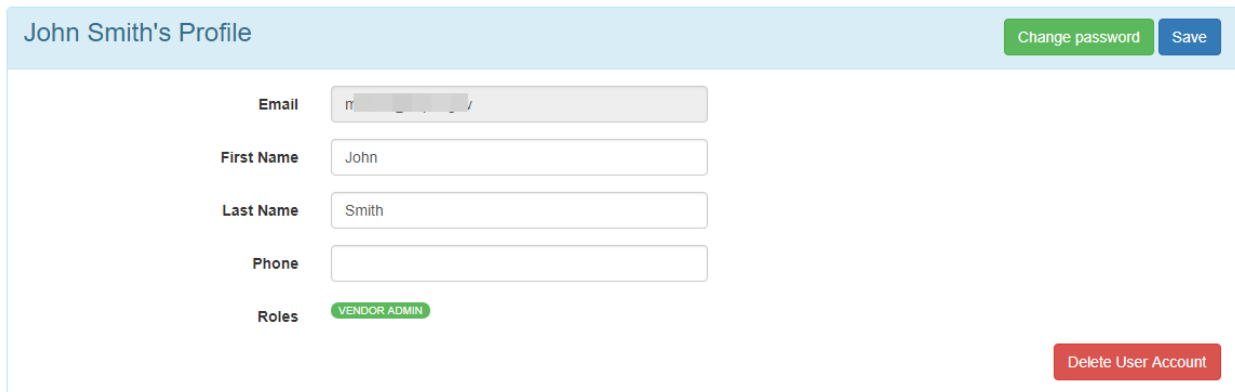
1. To view a user profile, click on the dropdown next to the user and vendor name and click on 'My Profile'.

Below is an image displaying the drop down arrow next to a user's name and all the options available under their account



2. The vendor user's contact information and system role will be displayed.

Below is an image displaying the user's profile and contact information



3. The 'Vendor Information' section will display information regarding the vendor organization (i.e. Business Name, DUNS, Address). The 'Address' fields listed will default to the vendor address as listed in SAM (System for Award Management). A user may edit this vendor information on their user profile, however it will not change the default vendor information.

Below is an image of the 'Vendor Information' screen that displays the address of the organization

The screenshot shows a 'Vendor Information' form with the following fields and values:

Field	Value
Business Name	CGI FEDERAL INC.
DUNS +4	145
Address 1	1234 Consulting Drive
Address 2	
City	Fairfax
State/Region	VA
Zip/Postal Code	22033
Country	

Buttons: Save (top right), Delete Vendor Account (bottom right)

Password Policy and Password Reset Process

Password policy

The password for the Vendor Portal account will need to be changed every 60 days. The password for Vendor Portal accounts must be at least 12 characters long and include: one uppercase letter, one lower case letter, one number and one special characters. The following special characters are accepted to use in passwords:

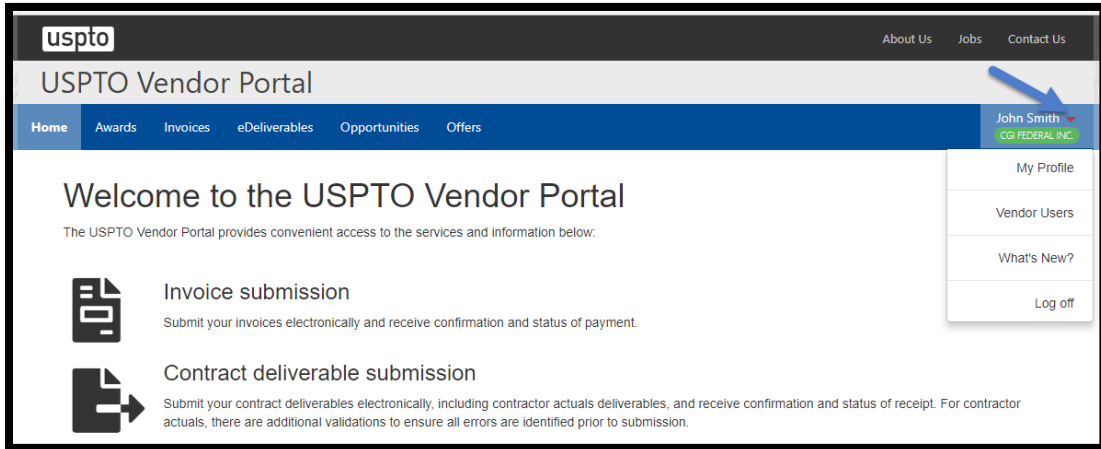
~`!@#\$\$%^&*()-_+={}\|v::<>.,/'?"

Changing your Password

To change the password for your account, you will need to log on to your account with the current password.

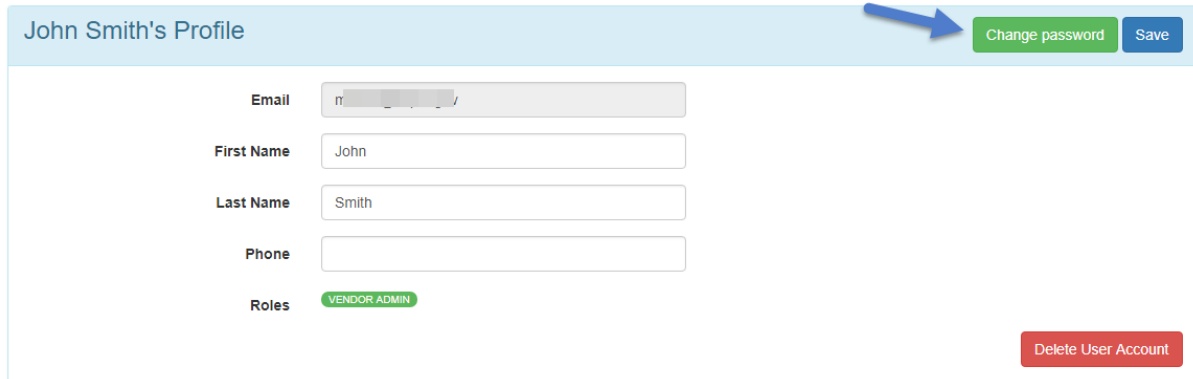
1. At the top of the navigation bar, you will see your name along with a carat icon next to it.
2. Select your name and you will be given a drop-down list of options.
3. One of the options is 'My Profile', please select the link in order to proceed.

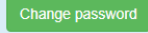
The image below displays the users name and shows the carat icon, the 'MyProfile' option is displayed.



4. Once selected, you will be taken to a page to change information about your profile.

The image below illustrates the 'Change Password' button



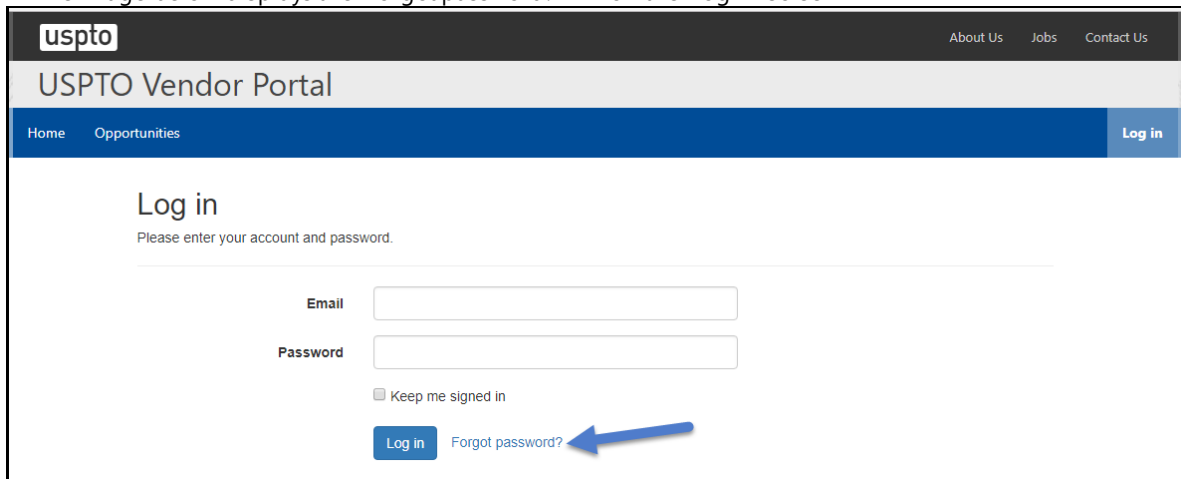
5. Click on the 'Change password'  button to initiate the process to change your password.

Forgot your Password?

If you forgot the password, you can reset the password for your account

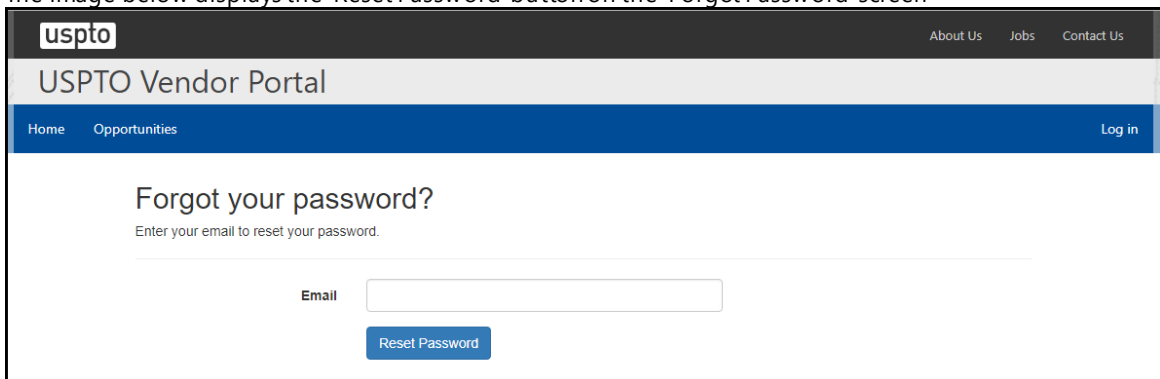
1. To start, click on the 'Forgot password?' link located on the 'Log in' page or visit the page: <https://vendors.uspto.gov/VendorPortal/Account/ForgotPassword>

The image below displays the 'Forgot password?' link on the 'Log In' screen



2. To keep your account secure, please enter your email address associated with your account and click on the 'Reset Password' [Reset Password](#) button.

The image below displays the 'Reset Password' button on the 'Forgot Password' screen



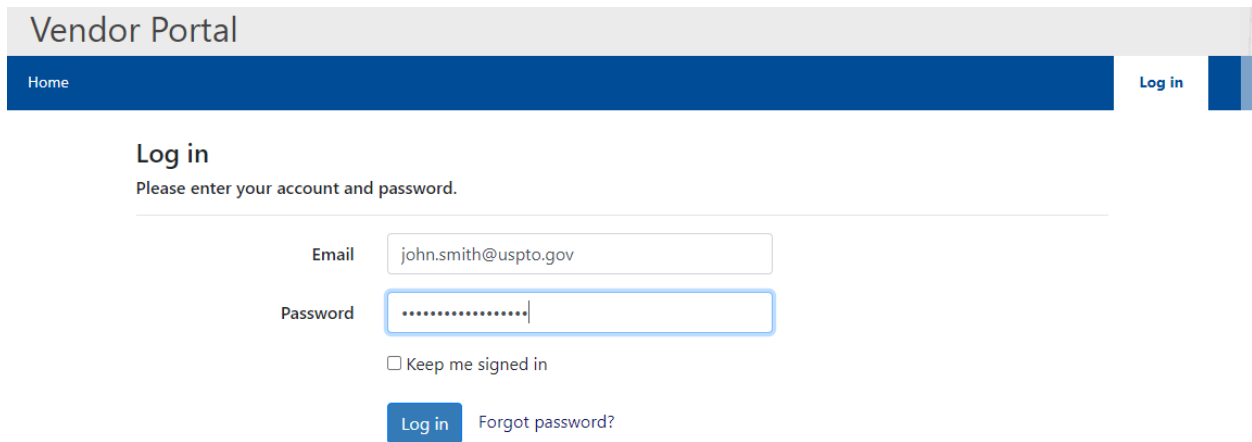
3. The page will then notify you that an email was sent to your registered email address. The email will provide you with a link to reset your password.

Multifactor Authentication

Multifactor Authentication Steps

The Vendor Portal requires a strong authentication process to enhance security when logging in to your account. Users are required to enter a 6-digit authentication code that is sent to your account email address, along with your Username and Password when logging in.

1. Navigate to Vendor Portal, enter your login credentials and select Log in

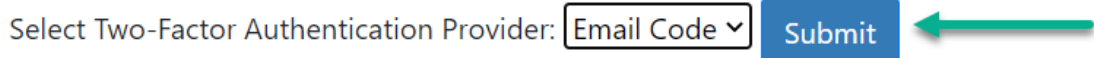


The screenshot shows the Vendor Portal login interface. At the top, there is a header with 'Vendor Portal' on the left and 'Home' on the right. Below the header is a navigation bar with 'Home' on the left and 'Log in' on the right. The main content area is titled 'Log in' and contains the instruction 'Please enter your account and password.' Below this are two input fields: 'Email' with the value 'john.smith@uspto.gov' and 'Password' with a masked password. There is a checkbox for 'Keep me signed in' and a 'Log in' button. A link for 'Forgot password?' is also present.

2. Next, you will be prompted to send a verification code to your email account on file

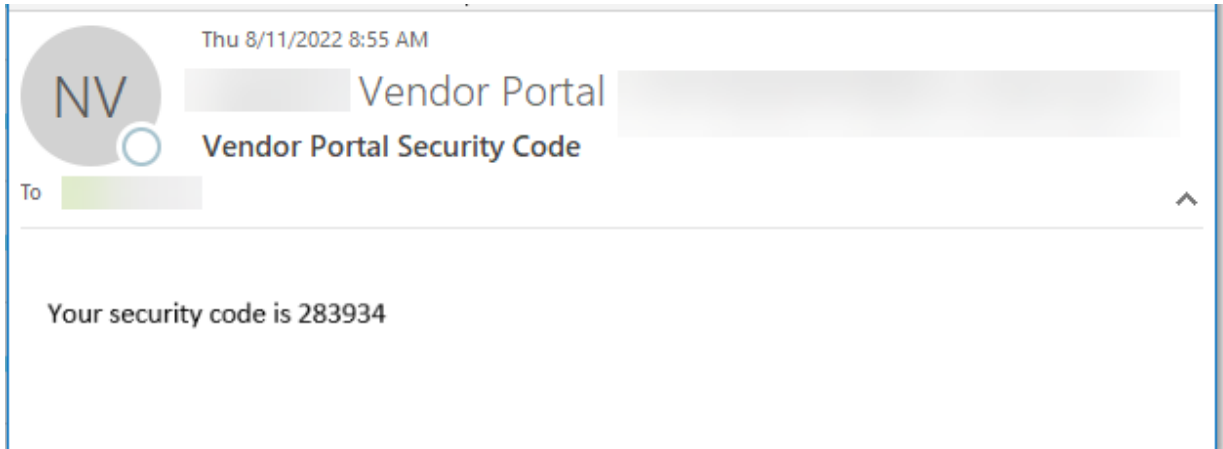
Send

Send verification code



The screenshot shows the 'Send verification code' step. It features a label 'Select Two-Factor Authentication Provider:' followed by a dropdown menu with 'Email Code' selected. To the right of the dropdown is a blue 'Submit' button. A green arrow points to the 'Submit' button.

3. After clicking Submit above, navigate to your email account and you will see an email notification from Vendor Portal with a six-digit security code



4. Enter the six-digit security code that was sent to your email into Vendor Portal

The Vendor Portal interface for verification. It features a header with 'Vendor Portal' and navigation tabs for 'Home' and 'Opportunities'. Below the header, the page title is 'Verify' with the instruction 'Enter verification code'. A text input field labeled 'Code' contains the number '283934', with a green arrow pointing to the right. Below the input field is a checkbox labeled 'Remember this browser?'. At the bottom is a dark blue 'Submit' button.

5. Click Submit and you will be successfully logged in

Key Terms

Award

A contract, open market simplified acquisition, or BPA.

Contractor Actuals Deliverables

Contractor Actuals are comprised of a number of different items. Templates are available for vendors that notate every FTE and how the resource is billed. Two deliverables are required for Contract Actuals, an A file and a B file, both of which are submitted each month to create a Receiver. The vendor will also submit an invoice that matches the A & B file submissions. The COR will validate and Finance will then be able to process the payments.

Other Contract Actual deliverables include acquisition plans, project deliverables, schedules, and other support documentation.

Contracting Officer Representative (COR)

Contracting officers have authority to enter into, administer, or terminate contracts and make related determinations and findings. Contracting officers may bind the Government only to the extent of the authority delegated to them. Contracting officers shall receive from the appointing authority (as described in FAR subpart 1.6 Career Development, Contracting Authority, and Responsibilities) clear instructions in writing regarding the limits of their authority. Information on the limits of the contracting officers' authority shall be readily available to the public and agency personnel. Contracting officers are responsible for ensuring performance of all necessary actions for effective contracting, ensuring compliance with the terms of the contract, and safeguarding the interests of the United States in its contractual relationships. In order to perform these responsibilities, contracting officers should be allowed wide latitude to exercise business judgment.

eDeliverables

Electronic deliverables that are required by the terms of the contract and can be submitted for review using Vendor Portal.

Invoice Template

An Excel file that is available to use an example that will help vendors format their invoices (a contractor's bill or written request for payment under the contract for supplies delivered or services performed).

Opportunities

The 'Opportunities' tab within Vendor Portal has not yet been operationalized, however once this functionality becomes available, this is where you will find opportunities within USPTO. Vendors can follow their individual opportunity link or public opportunity and respond directly to the request when logged in to Vendor Portal.

PPA Codes

PPA stands for 'Program, Project, and Activity'. They are a government wide cost accounting practice. Vendors working with PTO should be given a PPA code by their CO/COR. This PPA code is required in our systems as well as on the invoices.

Vendor Portal

The USPTO Vendor Portal is a secure web-based service to provide more efficient information flow between the USPTO and our vendor community. The Vendor Portal provides vendors with the ability to manage invoice and deliverable submission electronically as well as obtain status of payments and other pertinent information on your awards. Vendor Portal access provides the capability to electronically submit invoices, contract deliverable(s) and view up to date contract information.

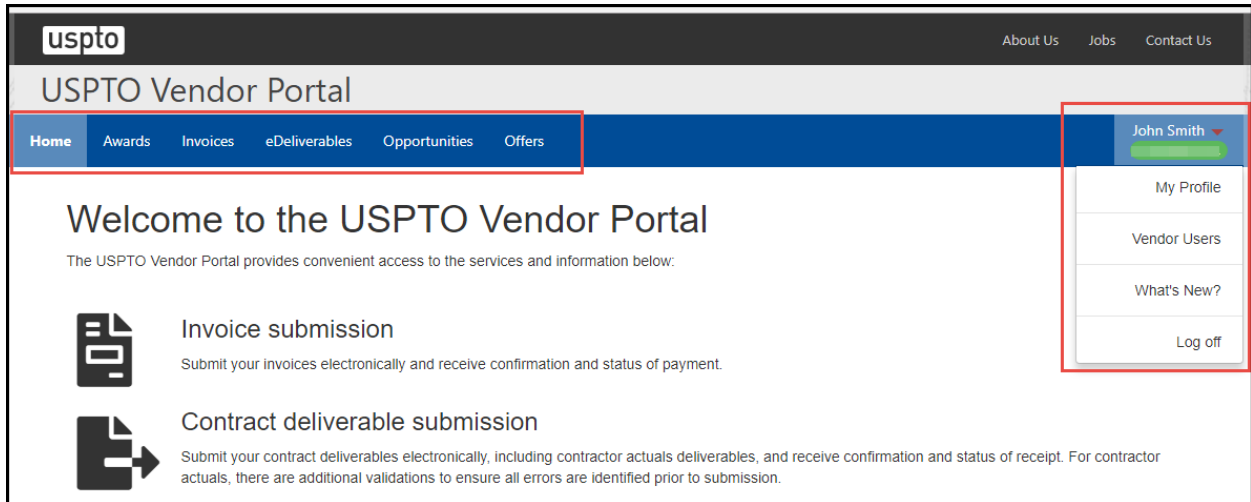
Navigating Vendor Portal

Navigation Tools

Navigating Vendor Portal

After log-in, the main navigation menu will be displayed in a grey bar towards the top of the page.

The below image illustrates the options available in the navigation menu as well as in the drop down carat for the user profiles



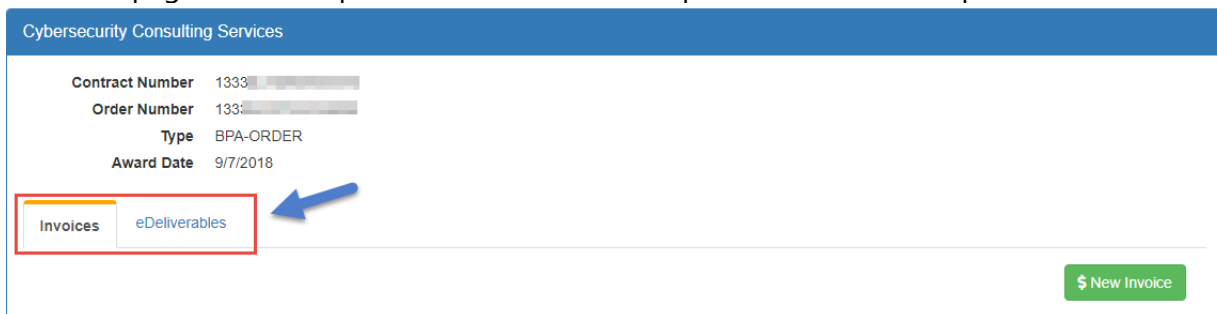
There are six primary navigation options:

1. Home
2. Awards
3. Invoices
4. eDeliverables
5. Opportunities
6. Offers

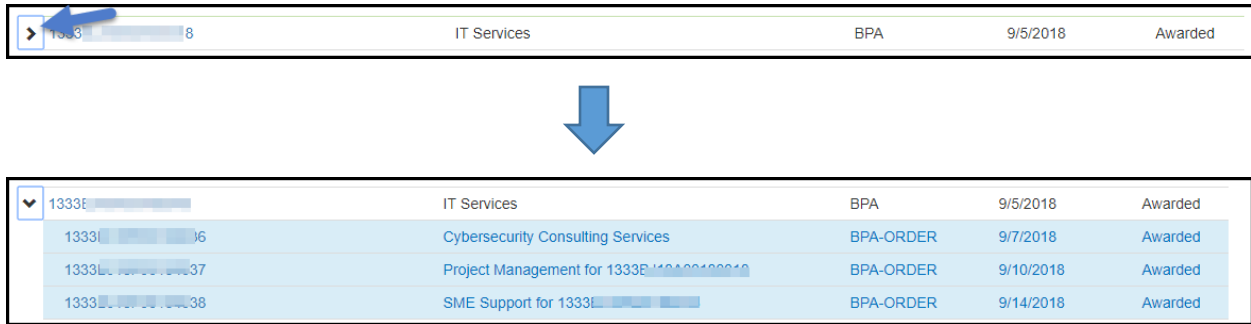
To the right, are three additional options:

1. My Profile
2. Vendor users
3. What's New?
4. Log off

On some pages, sub tabs provide additional menu options, as in the example below.



On the 'Award' page, expandable and collapsible arrows provide additional details related to the award, as in the example below.



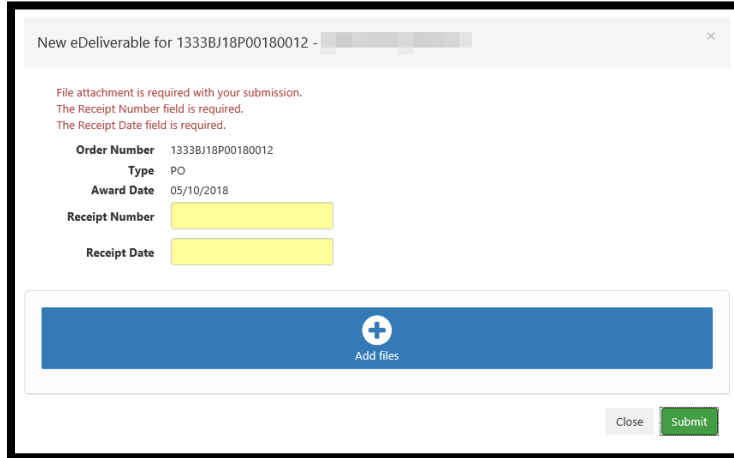
Order Number	Item Description	Order Type	Award Date	Status
1333E[redacted]8	IT Services	BPA	9/5/2018	Awarded
1333E[redacted]6	Cybersecurity Consulting Services	BPA-ORDER	9/7/2018	Awarded
1333E[redacted]37	Project Management for 1333E[redacted]	BPA-ORDER	9/10/2018	Awarded
1333E[redacted]38	SME Support for 1333E[redacted]	BPA-ORDER	9/14/2018	Awarded

Forms

Field/Validations

In Vendor Portal, some forms are not eligible for submission unless all of the required fields or attachments are provided. If required fields are not completed, the system will indicate the missing required fields in an error message. The user will be unable to proceed until the required information is completed.

The image below illustrates the error messages that will display when required fields are missing.



New eDeliverable for 1333BJ18P00180012 - [redacted]

File attachment is required with your submission.
The Receipt Number field is required.
The Receipt Date field is required.

Order Number 1333BJ18P00180012
Type PO
Award Date 05/10/2018

Receipt Number [yellow highlight]
Receipt Date [yellow highlight]

+ Add files

Close Submit

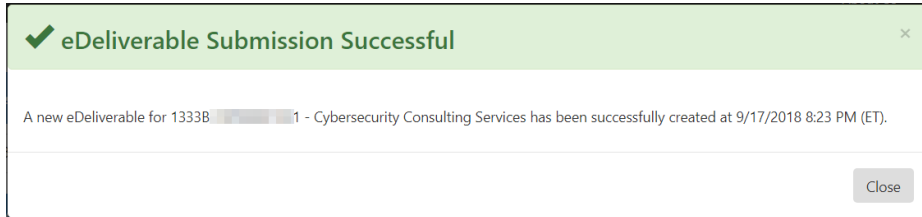
This form is missing information so the system will notify the user which required fields are needed before allowing submission

Success Messages

Vendor Portal will display a green success message at the top of the screen after each successful action, as in the example below. Success messages indicate that you've successfully completed the desired action; it may include important information such as the date and time that the process was completed. These messages are only visible to the user initiating the action and will disappear when you navigate to a different page or manually close the message.

Please note that a successful submission does not necessarily indicate that the submitted deliverable or invoice has passed system validations. For more information regarding eDeliverable for CA Deliverable Templates refer to section: Submit a Contract Actuals File. For more information regarding Invoice Validation for CA Invoice Templates refer to section: Submit a Contractor Actuals (CA) Invoice & Invoice Template.

The image below illustrates a successful eDeliverable submission message.



Tables

Vendor Portal displays information in table format. Each tab has several columns of relevant information that are capable of being sorted for user preference. Several lists display as tables in Vendor Portal.

Sorting Tables

In Vendor Portal, you can sort tables to help you quickly find the information you need. This will rearrange the table so that the column you've selected displays in alphabetical or numerical order.

1. Navigate to the header of the column you'd like to sort. Click on the header column to sort results by that column. An arrow pointing up or down will indicate whether results are sorted in ascending or descending order.

The image below illustrates a standard table in Vendor Portal

Award Number ▲	Title	Type	Award Date	State
133[redacted]02 1333[redacted]04	[redacted]	BPA-ORDER	7/27/2018	Awarded
133[redacted]03 1333[redacted]05	[redacted]	BPA-ORDER	7/27/2018	Awarded
▶ 1333[redacted]04	[redacted]	BPA	4/17/2018	Awarded
▶ 1333[redacted]05	[redacted]	BPA	4/17/2018	Awarded

When you select a sortable header, a small blue triangle will appear, indicating the ascending or descending direction of the sorted information. A right side up triangle (▲) means the information is ascending; a downward pointing triangle (▼) means the information is descending.

- You can click the header column again to reverse the way the information has been sorted. The small triangle will change direction to indicate whether the information is ascending or descending.
- You can select a header column to sort by another category in the table.

The image below illustrates the header column, in this case 'Title'


Award Number	Title ▲	Type	Award Date	State
GS-06F-000000001		GWAC-ORDER	5/2/2018	Awarded
1333000000005		CONTRACT	2/21/2018	Awarded
1333000000001		BPA-ORDER	9/12/2018	Awarded

Paginated Tables

Tables in Vendor Portal will only display a limited number of items on each page. The navigation bar at the bottom of the page will become active if the table spans multiple pages. The results will indicate what page you are currently on and by highlighting the current page number out of a total number of pages.

The image below illustrates the numbered pages of information available in Vendor Portal



Use the arrow icon  button to navigate to the subsequent page. You can click on a page number to navigate to a specific page.

Searching

The main Vendor Portal header pages (ex. Awards) are searchable in order to reduce the results. In order to search for a specific result, enter a full or partial alphanumeric text in the upper right hand corner 'Search' box. If matching result(s) exists within the page, the page will be filtered down. Search results are not case sensitive.

The image below illustrates an example of 'Search' results in Vendor Portal

Award Number	Title	Type	Award Date ▼	State
1333000000004	8-Contract-0001	CONTRACT	2/21/2018	Awarded
1333000000004	Office Contract	PO	10/10/2017	Awarded

User Permissions

Introduction to User Permissions

The following roles are available to vendors when they request access to the system:

- **Vendor Administrator**: This is the Master Admin account for a vendor. This is the only account that USPTO will assist in creating when an organization is new to the agency. All subsequent roles (including additional Vendor Admin accounts for the vendor) will be assigned by this Vendor Admin account. This role has the ability to invite, manage, and delete users' within the vendor organization.
- **eDeliverable Manager**: This role has the ability to view, maintain, and submit eDeliverable actions on behalf of the vendor organization. It is assigned by the Vendor Admin role.
- **Invoice Manager**: This role has the ability to view, maintain, and submit Invoice actions on behalf of the vendor organization. Vendor Admin role.
- **Offer Manager**: This role has the ability to view posted opportunities and submit offers on behalf of the vendor organization. Vendor Admin role.

We suggest that you assign user permissions in a manner that aligns with your business processes. For example, if someone from your Finance department handles most of your invoice submission, consider granting them 'Invoice Manager' role. Your Vendor Administrators should routinely review the roles for all users within your organization and make updates as needed to ensure the security of the information shared within the Vendor Portal for your organization.

PART TWO

I'm an Administrator

What do I need to know?

I'm an Vendor Admin

The Administrator Role

In Vendor Portal, a user with the Vendor Admin role has the highest permission for a given vendor account and can perform the following:

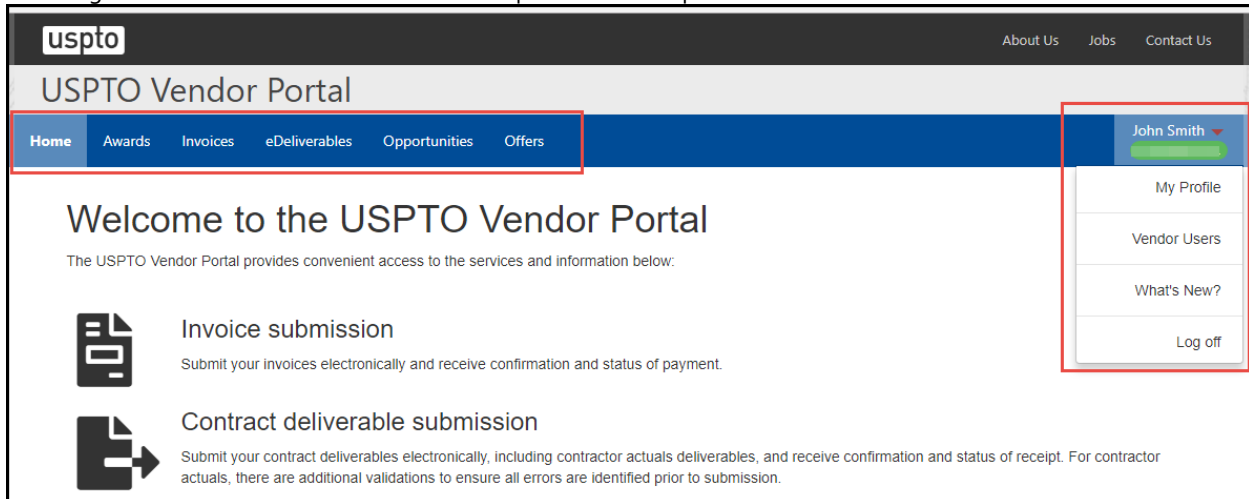
- Create and manage users for the vendor account
- View award information for all awards for the vendor
- View and submit invoices
- View and submit eDeliverables

Create and Manage Users

The 'Vendor Users' page allows the Vendor Admin to view, create, edit permissions and remove users for a vendor. Additional information on user permissions is located in the 'User Permissions' section.

1. To access the information, the Vendor Admin must log in to Vendor Portal.
2. At the top of the navigation bar, you will see your name along with a carat icon next to it.
3. Select your name and you will be given a drop down list of options.

The image below illustrates the 'What's New?' option in the drop down menu

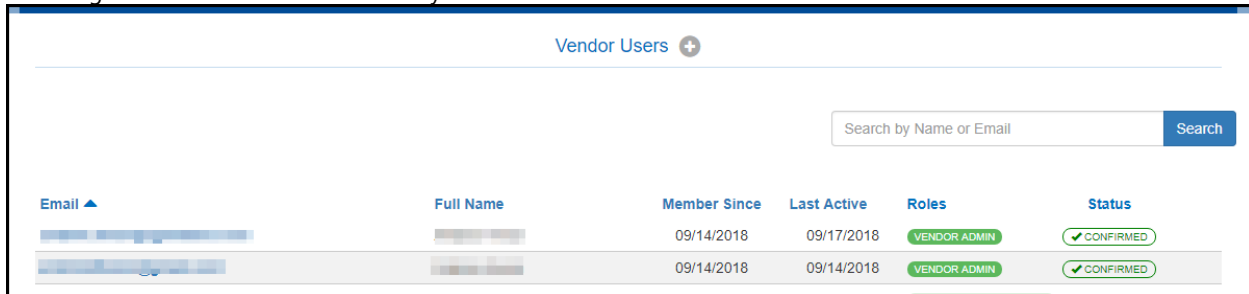


4. One of the options is 'Vendor Users', please select the link to display information for all users for the vendor account.

View User Permissions

The 'Vendor Users' page provides a summary of all users under the vendor account, including: each user's email address, full name, date the account was created, the date the account was last accessed, the roles for the user and the status of the user account.

The image below illustrates the summary screen for Vendor Users




A user account may have the below status:

Invited: This user has been invited, but has not confirmed the account.

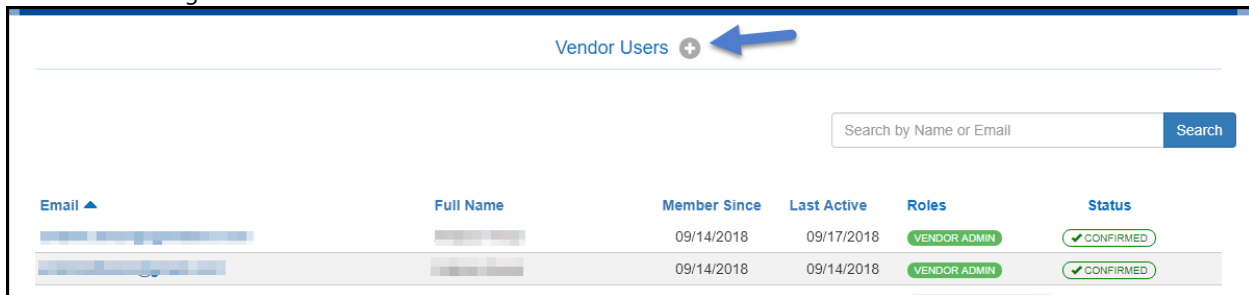
Confirmed: This user has been invited and has confirmed the account.

Disabled: This user account has been disabled, due to inactivity or by an administrator.

Create a User account

1. On the 'Vendor Users' page, click 'Vendor Users+'  button to access a form to create a new user account

The image below illustrates the 'Vendors Users +' button



2. Enter the information in the field for 'First Name', 'Last Name', 'Email' and 'Confirm Email'.
3. Select the appropriate 'User Roles' for the account.
4. Click the 'Create' button.

Once the account is created, the user will receive the invite email to confirm the account. There are no limits to the number of users you can create for a vendor account.

Modify a User account

1. On the 'Vendor Users' page, double click on a user account to modify.
2. The administrator can modify the information in the 'First Name', 'Last Name' and 'Phone' fields as well as changing the 'User Roles' for the user.

The image below illustrates how to add user roles to an account

The screenshot shows a window titled "User Profile - John Smith" with a "Disable Account" button at the top. Below the title bar, there are input fields for "Email", "First Name", "Last Name", and "Phone". The "Email" field contains "jc...", "First Name" contains "John", "Last Name" contains "Smith", and "Phone" contains "(555) 444-3333". Below these fields is a section titled "Select User Roles" with four role cards: "Vendor Admin", "Offer Manager", "Invoice Manager", and "eDeliverable Manager". The "Invoice Manager" and "eDeliverable Manager" cards are highlighted with green borders and green checkmarks. At the bottom right of the window are "Cancel" and "Save" buttons.

3. Click the 'Save' button to save changes.

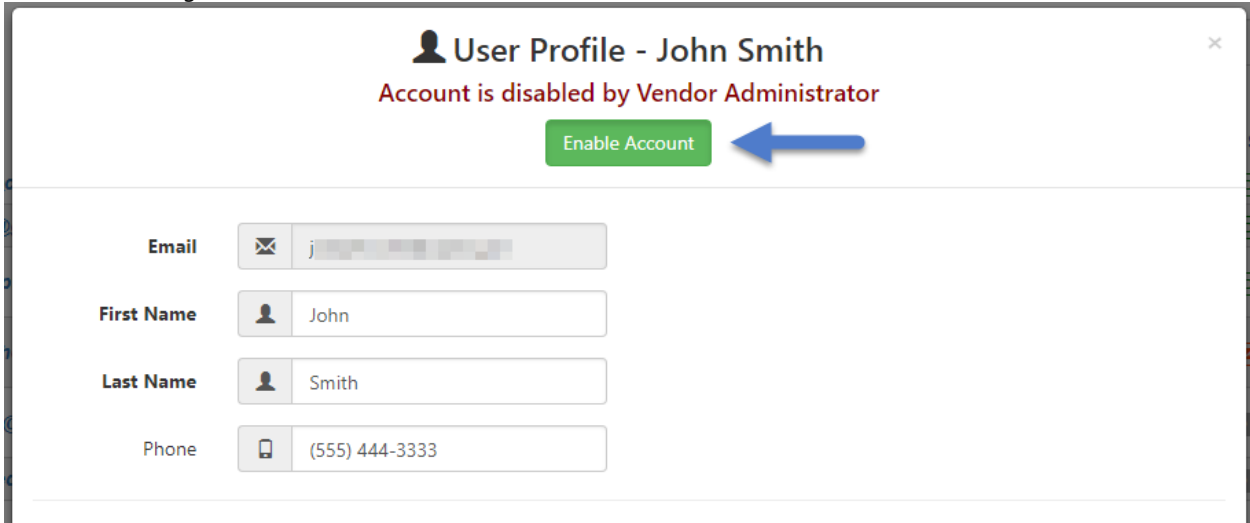
Disable/Enable a User account

1. On the 'Vendor Users' page, double click on a user account to modify.
2. At the top of the 'User Profile' window, the administrator can click the 'Disable Account' button to disable a user account if the account is currently active. Alternately, the administrator can click the 'Enable Account' button to enable a user account if the account is disabled.

The image below illustrates the location of the 'Disable Account' button

The screenshot shows the same "User Profile - John Smith" window as above. A blue arrow points to the "Disable Account" button, which is a green button located below the title bar and above the input fields.

The image below illustrates the 'Enable Account' button

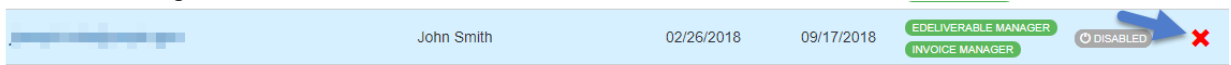


3. Click the 'Save' button to save changes.

Delete a User account

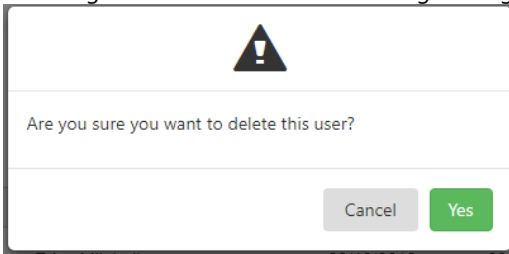
1. On the 'Vendor Users' page, locate the user account that needs to be removed
2. Hover to the right of the status to the user, the 'X' button will be presented to delete the account.

The image below illustrates the red 'X' icon needed to delete the account



3. A warning message will display to confirm the action to delete the user.

The image below illustrates the warning message that will display when you attempt to delete a user



4. Click 'Yes' to delete the user from the vendor account. Click 'Cancel' to abort the action.

View Award Information

1. Click on the 'Awards' tab on the navigation bar to access the award information. The 'Award' tab lists a table of all awards for the vendor account, including 'Award Number', 'Title', 'Award Type', 'Award Date' and 'State'.
2. Double click an award number of interest to access the information.

The image below illustrates the award information screen

The screenshot shows the award information screen for contract 1333E. It includes a breadcrumb 'Awards / 1333E', a 'Download Documents' button, and a list of documents: '1333E...docx' and 'BPC_1333...Processed.pdf'. Below this, there are tabs for 'Invoices' and 'eDeliverables', a 'New Invoice' button, and a table of invoices.

Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status
II INV 0005	8/21/2018	\$332.00	\$0.00		Submitted

View and Submit Invoices

1. Click on the 'Awards' tab on the navigation bar to access the award information.

The image below illustrates the 'Awards' tab

The screenshot shows the 'Awards' tab in the navigation bar. It includes a search bar with the text 'Search... i.e., 'construction'' and a 'Search' button. Below the search bar is a table of awards.

Award Number	Title	Type	Award Date	State
1333E...01		BPA	9/14/2018	Awarded
1333E...01		PO	9/12/2018	Awarded
1333E...4001		BPA-ORDER	9/12/2018	Awarded
1333E...3	IT Services	BPA	9/5/2018	Awarded

2. Double click an award number of interest to access the information. The 'Invoices' tab displays a table of all the invoices submitted for the award, including 'Invoice Number', 'Invoice Date', 'Invoice Amount', 'Amount Paid', 'Paid Date' and the 'Status'.

The image below illustrates the 'Invoices' tab and the '\$ New Invoice' button


Cybersecurity Consulting Services

Order Number 1333
Type PO
Award Date 11/2/2017

Invoices eDeliverables

Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status
INV12345	6/28/2018	\$4,500.00	\$0.00		Submitted
		Total: \$4,500.00	Total: \$0.00		

\$ New Invoice

3. To submit a new invoice, click the '\$ New Invoice'  button.

For more information about submitting invoices, visit [Submit an Invoice](#)

View and Submit eDeliverables

1. Click on the 'Awards' tab on the navigation bar to access the award information.
2. Double click an award number of interest to access the information. The 'eDeliverables' tab displays a table of all the invoices submitted for the award, including eDeliverable Number, eDeliverable Date and Status.

The image below illustrates the 'New eDeliverable' button


Cybersecurity Consulting Services

Order Number 1333
Type PO
Award Date 11/2/2017

Invoices eDeliverables

eDeliverable Number	eDeliverable Date	Status
	09/17/2018	Submitted

New eDeliverable

3. To submit a new eDeliverable, click the 'New eDeliverable'  button.

For more information about submitting eDeliverables, visit [Submit an eDeliverable](#)

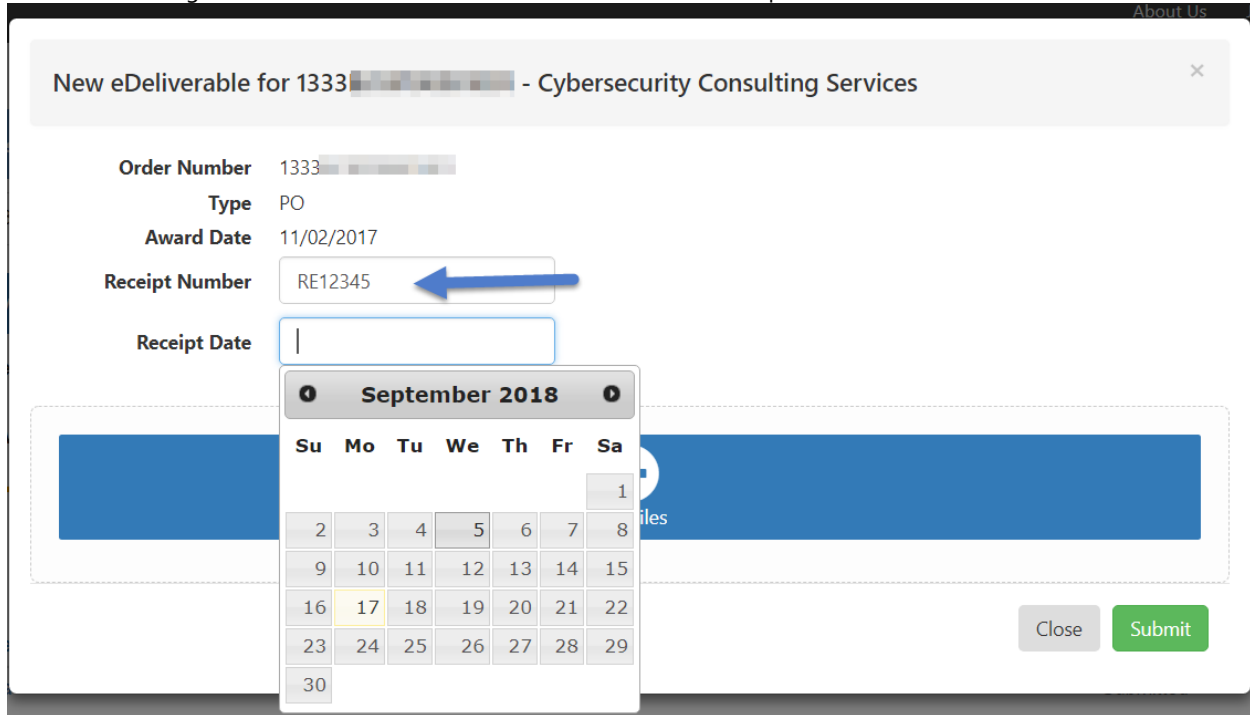
PART THREE


I'm an eDeliverable Manager.

What do I need to know?

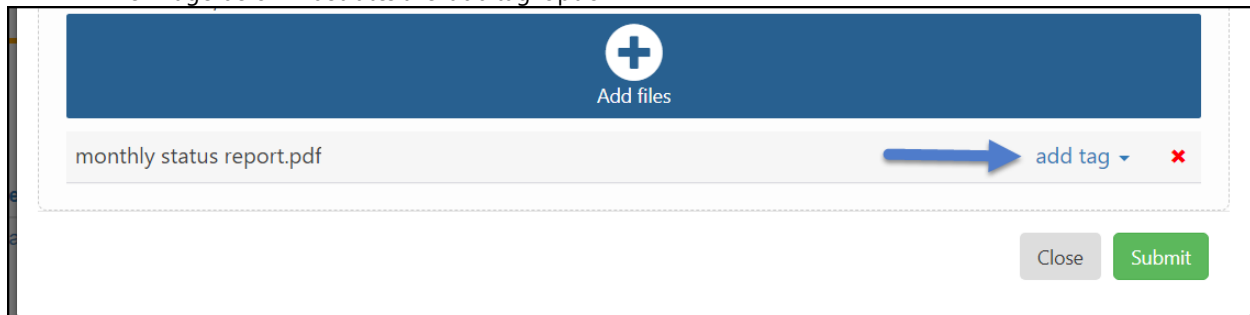
- In the eDeliverable creation screen, the vendor must enter a 'Receipt Number' and a 'Receipt Date'. The 'Receipt Number' is a free from text field that accepts alphanumeric values and is a reference identification that the vendor organization can use to communicate with USPTO. Please note the Receipt Number field has a character limit of 20 characters.

The image below illustrates the calendar available in the 'Receipt Date' section



- Click the 'Add Files' icon  to upload any attachments. Select the appropriate file for upload from your computer. Once the file has been uploaded, click the 'add tag' link to open the dropdown containing a list of meta data tags.

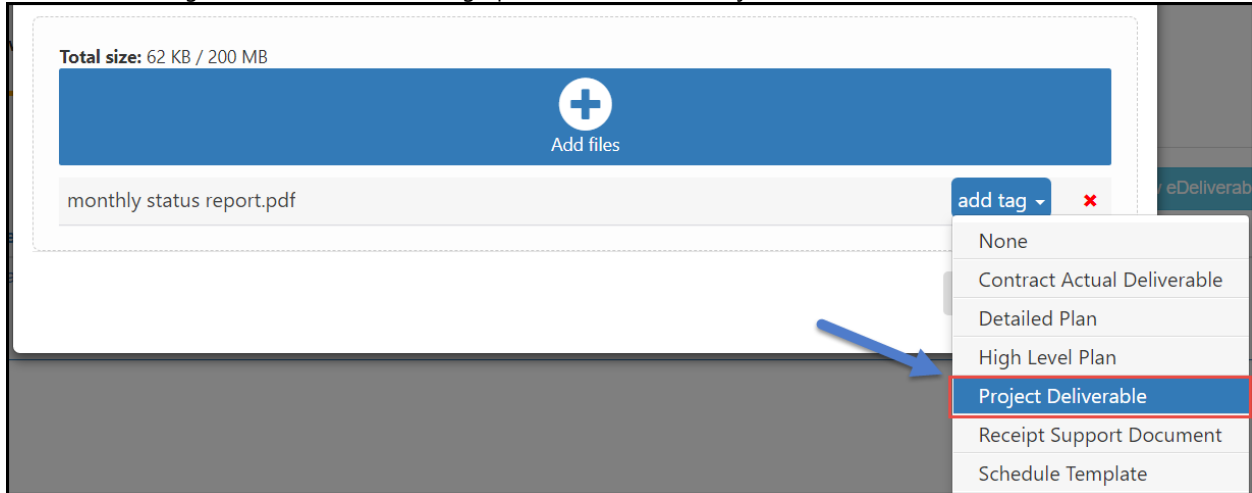
The image below illustrates the 'add tag' option



- The appropriate tag should be selected from the dropdown list. **Note:** The 'Contract Actual Deliverable', 'Detailed Plan', 'High Level Plan' and 'Schedule Template' tags should only be used for files that will go through the USPTO Contractor Actuals validation

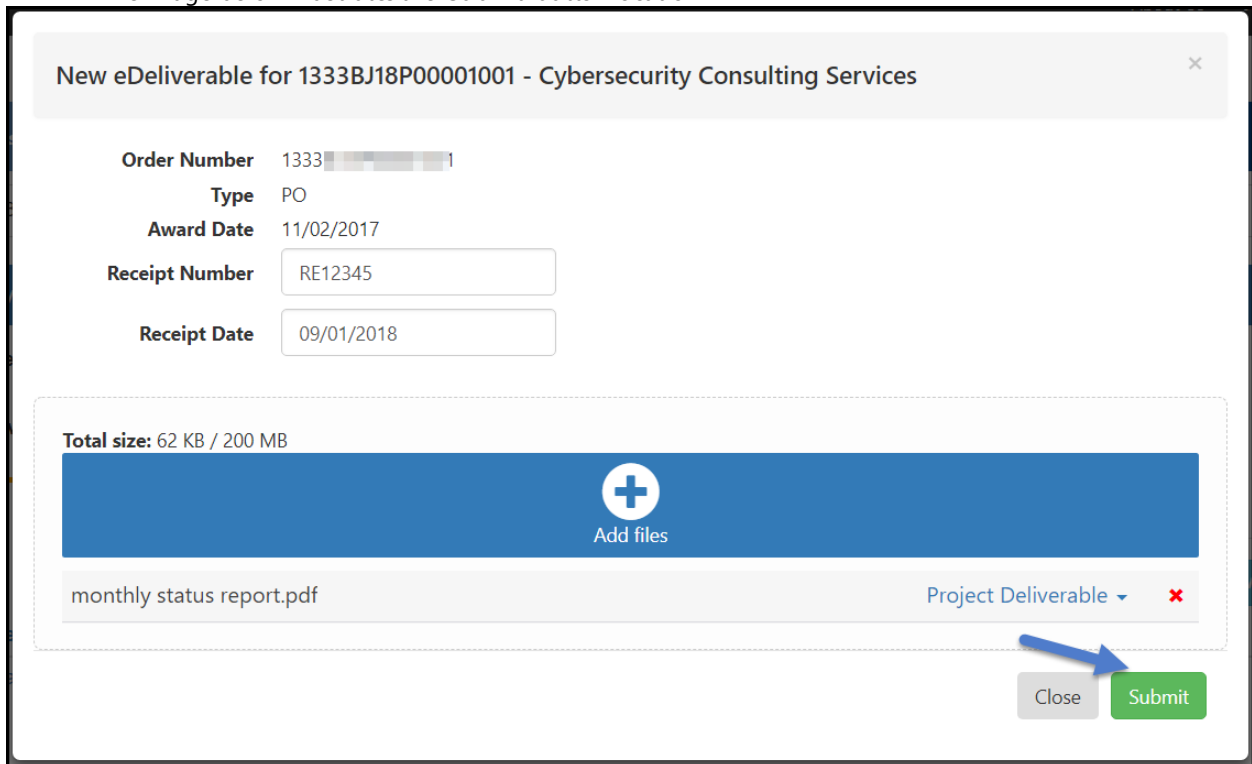
process (see 'Contract Actual Deliverable' section for more information). The image below has an example of a monthly status report being delivered to USPTO. The attachment is tagged with the 'Project Deliverable' tag.

The image below illustrates the tag options, in this case 'Project Deliverable' is selected



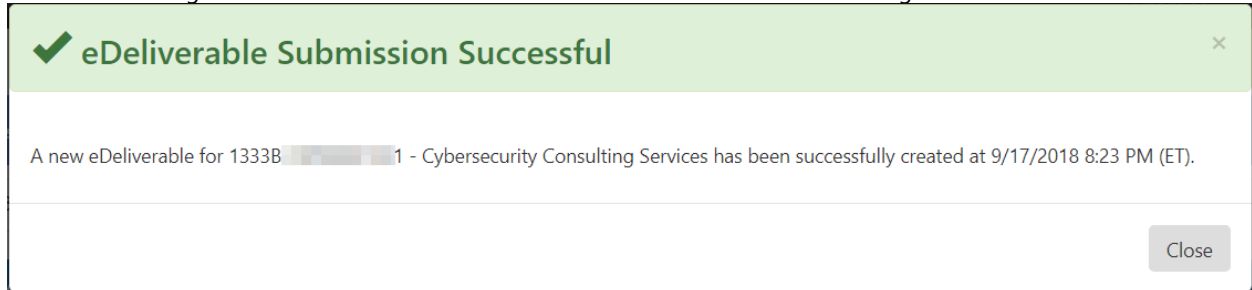
8. When the appropriate tag has been selected, click the 'Submit' button.

The image below illustrates the 'Submit' button location



9. The below message will be returned upon successful submission.

The image below illustrates the 'eDeliverable Submission Successful' message




10. The 'eDeliverables' tab under the contract/order action will display all eDeliverable actions submitted for that contract/order.

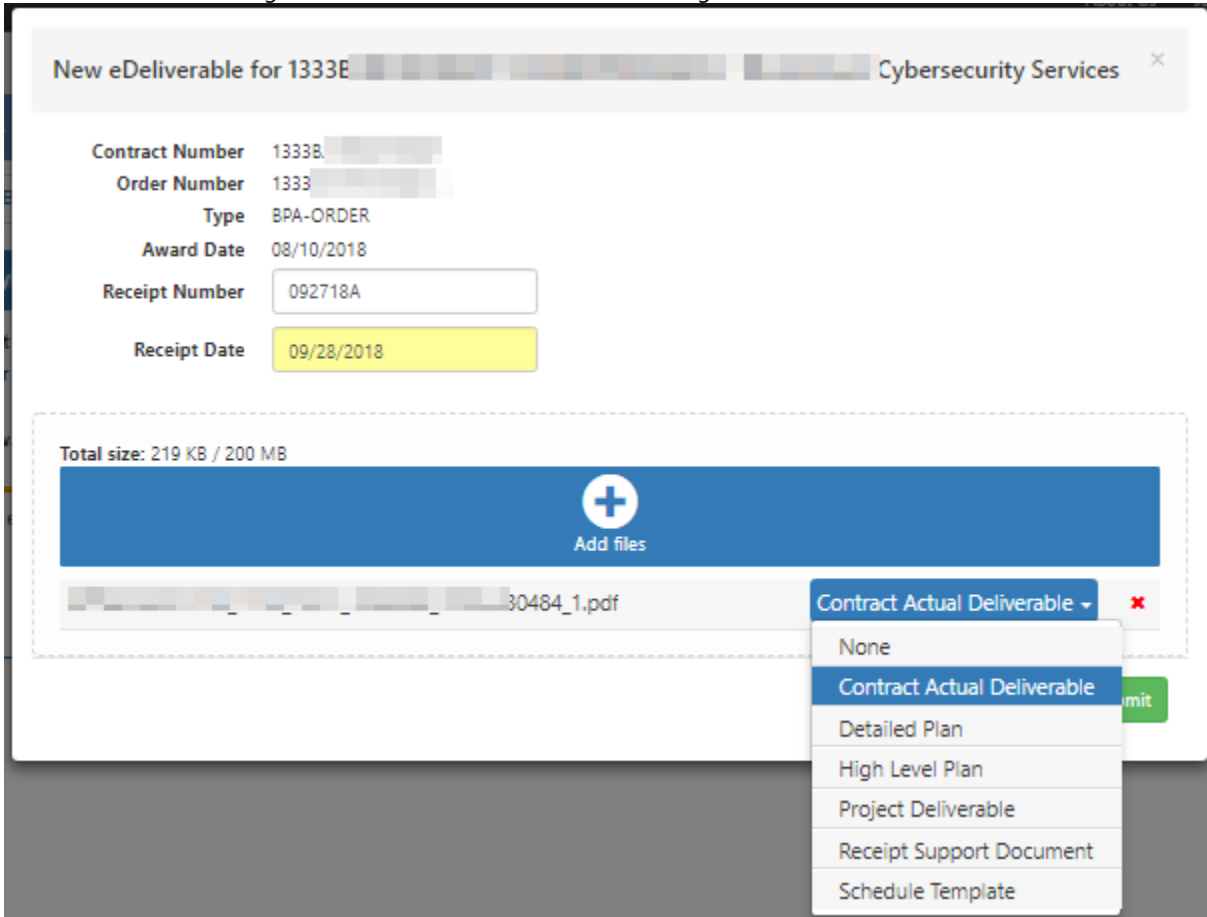
Submit a Contract Actuals File

To submit a Contractor Actuals (CA) deliverable through the Vendor Portal, follow the below steps.

Note: It is important to locate the **correct order** in which the Contract Actuals file should be submitted against. The existing USPTO Contractor Actuals (CA) template should be used to populate the appropriate data.

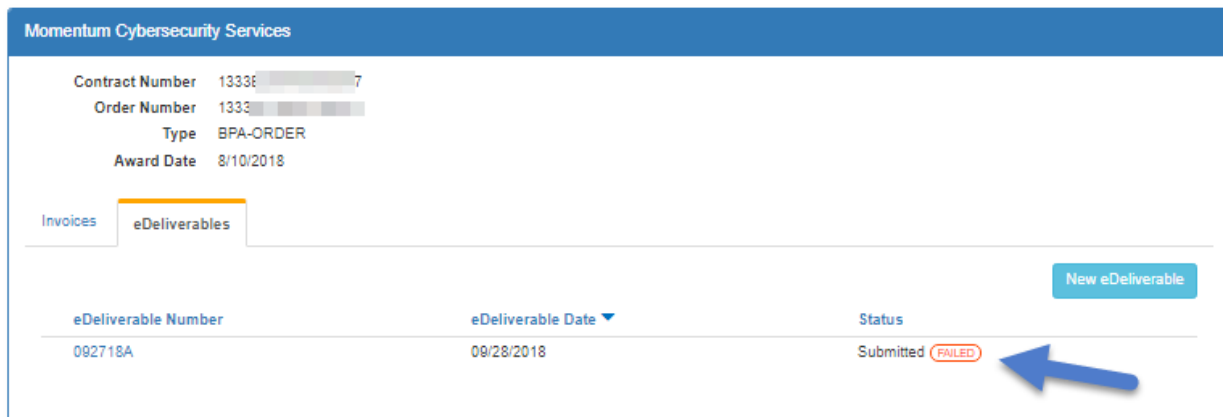
1. Complete the Contractor Actuals (CA) Template.
2. Locate the correct order in which the CA file(s) should be submitted against.
3. Navigate to the 'eDeliverables' tab within the order action.
4. Click the 'New eDeliverable' button.
5. Enter a 'Receipt Number' and select a 'Receipt Date'.
6. Click the 'Add Files'  button.
7. Upload the Contractor Actuals (CA) Template file.
8. Select the 'Contract Actual Deliverable' tag as show in the image below. **Note:** If this tag is not selected the file will not be routed through the validation process.

Below is an image of the 'Contract Actual Deliverable' tag



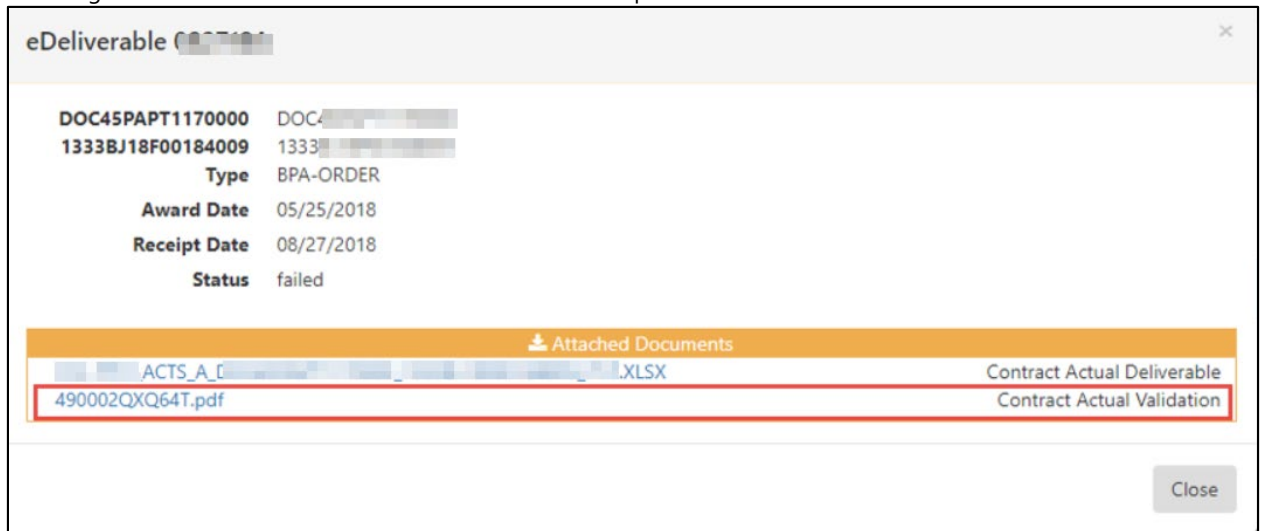
9. Click the 'Submit' button.
10. Upon submission, the vendor user will be routed to the 'eDeliverable' tab of the order action.
11. The validation status of 'Passed' or 'Failed' will be visible after submission.

The image below illustrates the validation status, in this case it was 'Failed'



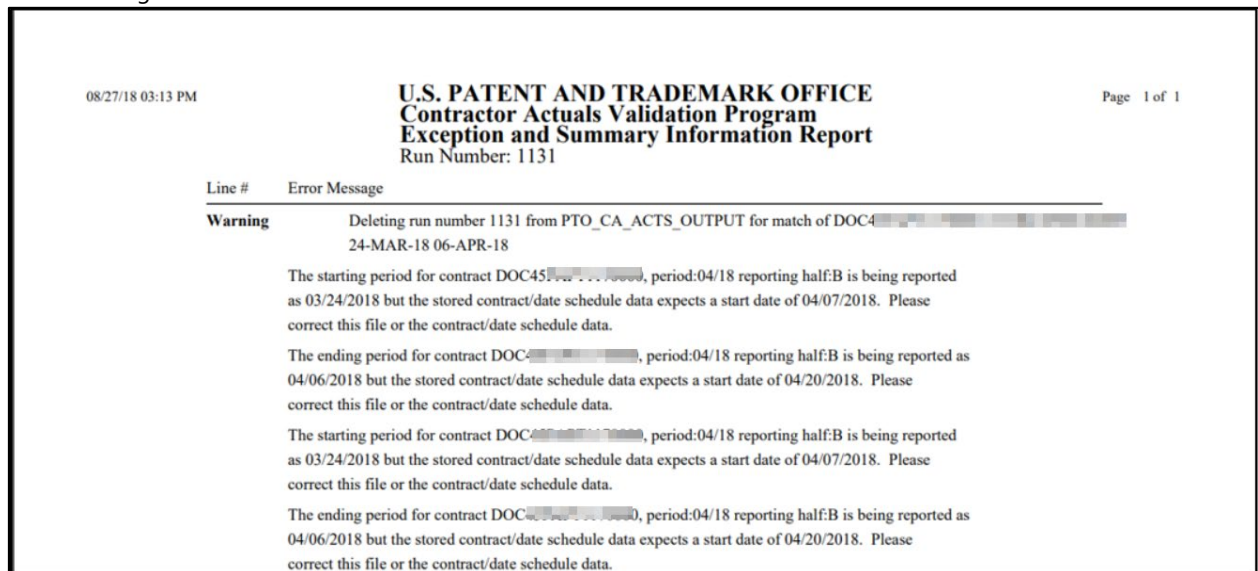
12. Click into the eDeliverable action to view the 'Contract Actual Validation .pdf'

The image below illustrates the 'Contract Actual Validation.pdf' file



13. If the validation status is 'Failed', open the 'Contract Actual Validation' file to review the errors.

The image below illustrates the PDF file with the errors described



14. If the validation status is 'Failed', the Contract Actuals (CA) file will need to be corrected and resubmitted (repeat steps 1-10).

Note: The Contract Actuals A and B files must be submitted monthly and pass validation upon submission. Please reach out to the MomentumHelpdesk@uspto.gov for validation or submission errors.

PART FOUR

I'm an Invoice Manager

What do I need to know?

Submit an Invoice

To initiate the invoicing process, it is important to locate the order (task order, deliver order, or BPA Call) that the invoice should be submitted against. **Note:** An invoice should not be submitted against a base award or modification action.

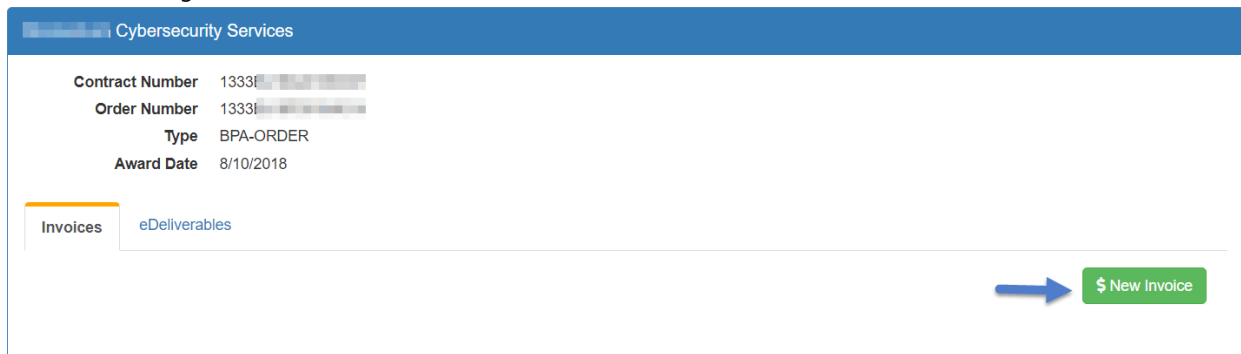
The image below illustrates the difference between a Base Award and an Order



1333BJ18A00180007	Base Award	BPA Setup	BPA	7/31/2018	Awarded
P18001		BPA Setup	BPA-MOD	8/7/2018	Awarded
1333BJ [redacted] 11	Orders	HD/Ops and Maintenance	BPA-ORDER	7/31/2018	Awarded
1333BJ [redacted] 12		Software Licenses	BPA-ORDER	8/7/2018	Awarded
1333BJ [redacted] 13		Project Management-	BPA-ORDER	8/7/2018	Awarded
1333BJ [redacted] 14		Cybersecurity Services	BPA-ORDER	8/10/2018	Awarded

1. To access the order, click into the action. Once accessed, the 'Invoices' tab will be displayed.

The image below illustrates the 'Invoices' tab and the '\$ New Invoice' button



Cybersecurity Services

Contract Number 1333[redacted]
Order Number 1333[redacted]
Type BPA-ORDER
Award Date 8/10/2018

Invoices eDeliverables

\$ New Invoice

2. Click the 'New Invoice' button to initiate the invoice creation.
3. On the 'Invoice Creation' screen, enter an 'Invoice Number', 'Invoice Date', 'Performance Start', and 'Performance End'. **Note:** Please enter the applicable billing 'Performance Start' and 'Performance End' dates as covered by the invoice. Invoice data entered in Vendor Portal should correspond with all supporting documentation attached in Vendor Portal (i.e. company invoice; CA Invoice Template). Additionally, the Invoice Number field has a character limit of 20 characters.

The image below illustrates a 'New Invoice' screen

New Invoice for 13331 [redacted] - [redacted] Cybersecurity Services ✕

Contract Number 13331 [redacted]
 Order Number 13331 [redacted]
 Type BPA-ORDER
 Award Date 08/10/2018


Invoice Number	INV082118
Invoice Date	08/21/2018
Performance Start	07/01/2018
Performance End	07/31/2018

Information matching with supporting attachments

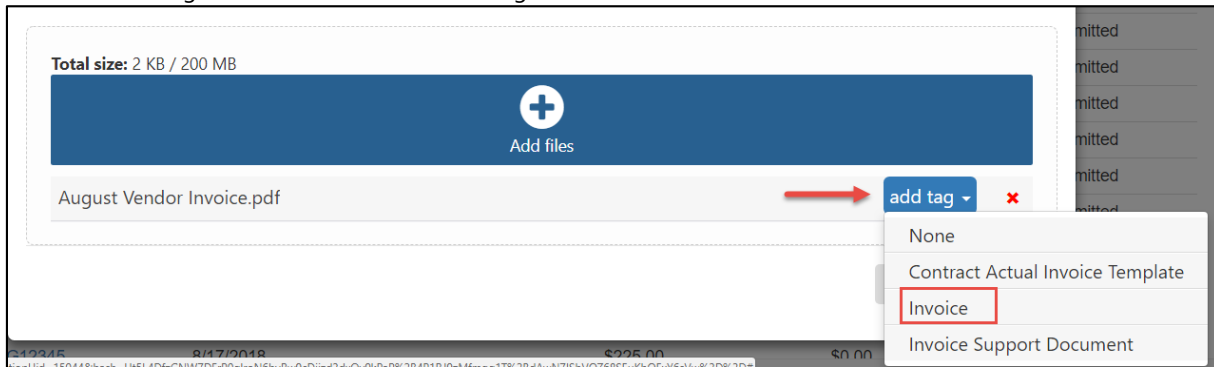
4. In the 'Items' section, the PPA data can be entered by clicking the 'Plus' button + next to the item number. **Note:** If submitting a Contractor Actuals (CA) Invoice template, PPA information should **not** be entered directly in the Vendor Portal.
5. The 'PPA Description', 'PPA Code', and 'Amount' should be populated. **Note:** Multiple PPA code entries can be entered under a single line item. For questions regarding PPA code information and what to use on the invoice, please reach out to the Contracting Officer's Representative (COR).

The image below illustrates the 'PPA Description', 'PPA Code', and 'Amount' values

Item Number	Description	Invoice Amount
0001	[redacted]	\$ 1,000.00 +
O&M	# SMOMFN-0000-S80000	\$ 1,000.00 +
0002	[redacted]	\$ 1,000.00 +
Proj. Mgmt	# SMOMFN-0000-S80000	\$ 1,000.00 +
0003	[redacted]	\$ Amount +
0004	[redacted]	\$ Amount +
Total Invoice Amount		\$ 2,000.00

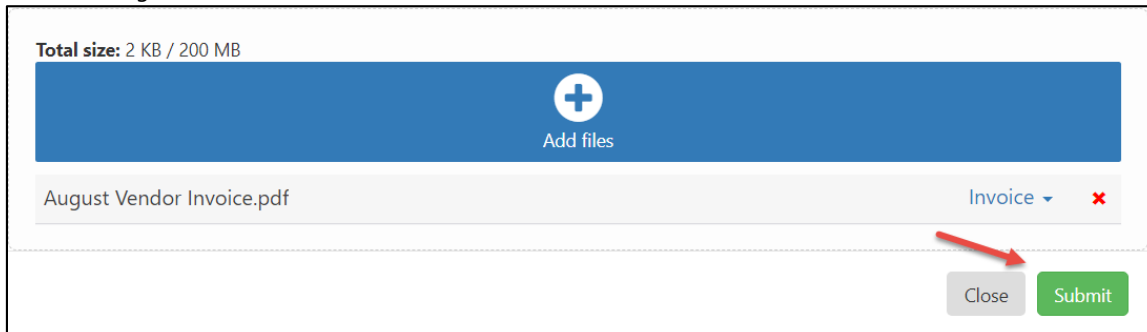
6. Click on the 'Add Files' button  to upload the invoice document (.pdf, .xlsx, .docx) and select the file from your computer. When the file is uploaded, click the 'add tag' dropdown and select the 'Invoice' tag. Proper tagging will ensure that the invoice is transmitted to USPTO in a timely and efficient manner.

The image below illustrates the 'add tag' button



7. When all information has been entered accurately, click the 'Submit' button at the bottom right of the screen.

The image below illustrates the 'Submit' button at the bottom of the screen



Submit a Contractor Actuals (CA) Invoice & Invoice Template

The Vendor Portal supports submission of the Contractor Actuals Invoice Template by any user with the 'Invoice Manager' role or the 'Master Admin' role. Once submitted, the template will be validated for accuracy and the results of the validation will be displayed for the vendor.

To submit a 'Contractor Invoice Template', please follow the below guidance.

1. Complete the 'Contractor Actuals Invoice Template' prior to submission in Vendor Portal.

The image below illustrates an example of the 'Contractor Invoice Template'

Naming Convention:											
Submission Time:										Submit with monthly invoice submission, in a separate file.	
Submission Location:											
Template Definition:										Contractor Invoice	

CONTRACTOR INVOICE TEMPLATE

REQUIRED	REQUIRED (If "DOC56PAPT" is issued)	REQUIRED	Applicable	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
USPTO CONTRACT / ORDER NUMBER * <i>(Official Obligation Number)</i>	TASK ORDER NUMBER <i>(Official Obligation Number)</i>	ITEM NUMBER <i>(See Obligation)</i>	SUBTASK NUMBER	REPORTING PERIOD <i>(MM/YY)</i>	INVOICE PERIOD OF PERFORMANCE START DATE <i>(MM/DD/YY)</i>	INVOICE PERIOD OF PERFORMANCE END DATE <i>(MM/DD/YY)</i>	PROGRAM	PROJECT	ACTIVITY	INVOICED AMOUNT	INVOICE NUMBER	INVOICE DATE

2. Locate the order action in Vendor Portal (task order, delivery order, BPA call) that the 'Contractor Invoice Template' should be submitted against. The PIID can be used as the identifier.
3. Click the 'New Invoice' button to create the new invoice action.
4. On the 'Invoice Creation' screen, enter the 'Invoice Number', 'Invoice Date', 'Performance Start', and 'Performance End' dates. **Note:** These values should match the information entered in the 'Contractor Invoice Template'. Additionally, the Invoice Number field has a character limit of 20 characters.

The image below illustrates the 'New Invoice' screen

New Invoice for DOC5 [redacted] Training 3 ✕


Contract Number	DOC [redacted]
Order Number	1333 [redacted]
Type	DO-TO
Award Date	03/26/2018
Invoice Number	<input type="text" value="NV08281824"/>
Invoice Date	<input type="text" value="11/25/2017"/>
Performance Start	<input type="text" value="11/25/2017"/>
Performance End	<input type="text" value="12/22/2017"/>

Information matching with the CA Invoice Template

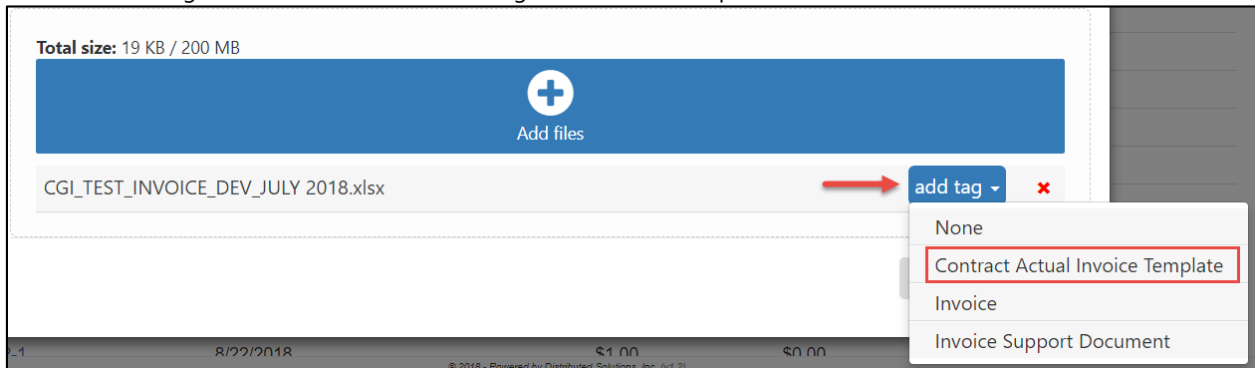
5. In the 'Items' section, enter the 'Invoice Amount' next to each applicable item number. **Note:** PPA code information should **not** be entered directly in Vendor Portal if the 'Contractor Invoice Template' is being submitted.


The image below illustrates the fields available for 'Invoice Amount'

Item Number	Description	Invoice Amount
0001		\$ 10.00 +
0002		\$ 10.00 +
0003		\$ 16.00 +
0004		\$ 20.00 +
0005		\$ 10.00 +
0006		\$ 20.00 +
0007		\$ 20.00 +
Total Invoice Amount		\$ 106.00

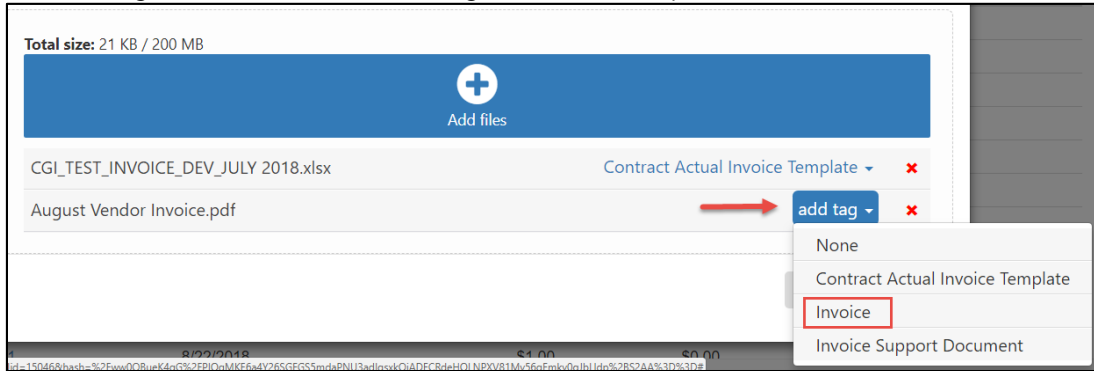
- To upload the 'Contractor Invoice Template', click the 'Add Files'  button. Once uploaded, click the 'add tag' dropdown and select 'Contract Actual Invoice Template'. **Note:** The file will need to be tagged correctly to ensure it goes through the validation process.


The image below illustrates the 'add tag' button and the options available



- To upload an additional file(s), such as the 'Invoice .pdf', click the 'Add Files'  button. Once uploaded, click the 'add tag' dropdown and select 'Invoice'.

The image below illustrates the 'add tag' button and the options available



8. Click the 'Submit'  button when all information has been entered and all files have been uploaded.
9. When the validation is complete, a status of 'Passed' or 'Failed' is returned.

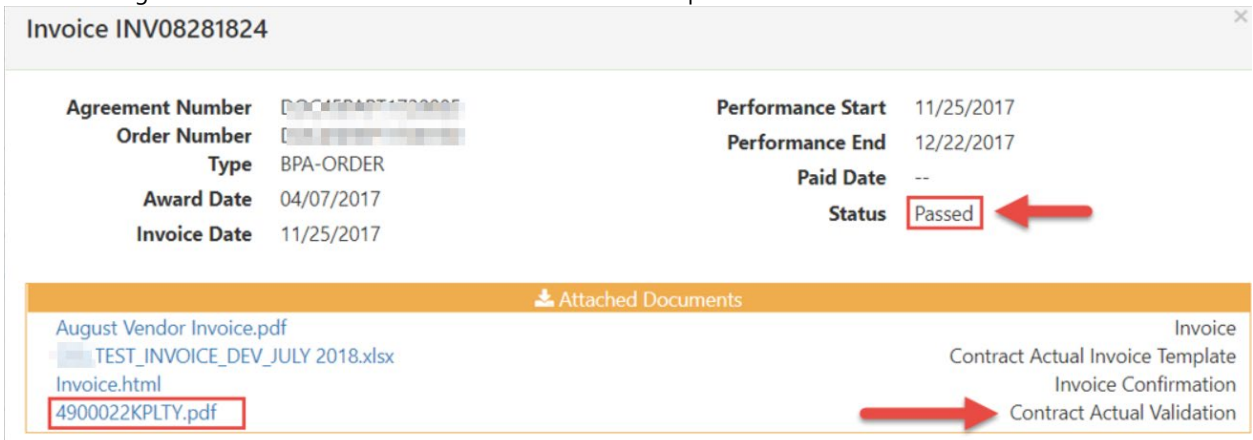
The image below illustrates the validation status, in this example it has 'PASSED'



10. To view a summary of the submission, click into the invoice action that was created (i.e. INV08281824) by clicking on the invoice number.

The 'Contract Actual Validation' file should be viewed to confirm results of the validation. If a status of 'Failed' is returned, the file will list all errors that caused the validation to fail. The errors will need to be corrected and the file will need to be resubmitted by repeating Steps 1-8.

The image below illustrates the 'Contract Actual Validation .pdf' file



The 'Invoice Confirmation' file provides an outline of the invoice submission that includes 'Invoice Date', 'Performance Start', 'Performance End' and 'Amount Invoiced' against specific line items. This file is generated in .html and can be saved for your records.

The image below illustrates an example of the 'Invoice Confirmation' file

Invoice INV08281824		
Agreement Number	[REDACTED]	
Order Number	[REDACTED]	
Type	BPA-ORDER	
Award Date	04/07/2017	
Invoice Date	11/25/2017	
Performance Start	11/25/2017	
Performance End	12/22/2017	
Attached Documents		
August Vendor Invoice.pdf	INVOICE	
[REDACTED]_INVOICE_DEV_JULY 2018.xlsx	CA INVOICE	
Item Number	Description	Invoice Amount
0001	[REDACTED]	\$10.00
0002	[REDACTED]	\$10.00
0003	[REDACTED]	\$16.00
0004	[REDACTED]	\$20.00
0005	[REDACTED]	\$10.00
0006	[REDACTED]	\$20.00
0007	[REDACTED]	\$20.00
Total Invoice Amount:		\$106.00

View & Search for previously Submitted Invoices

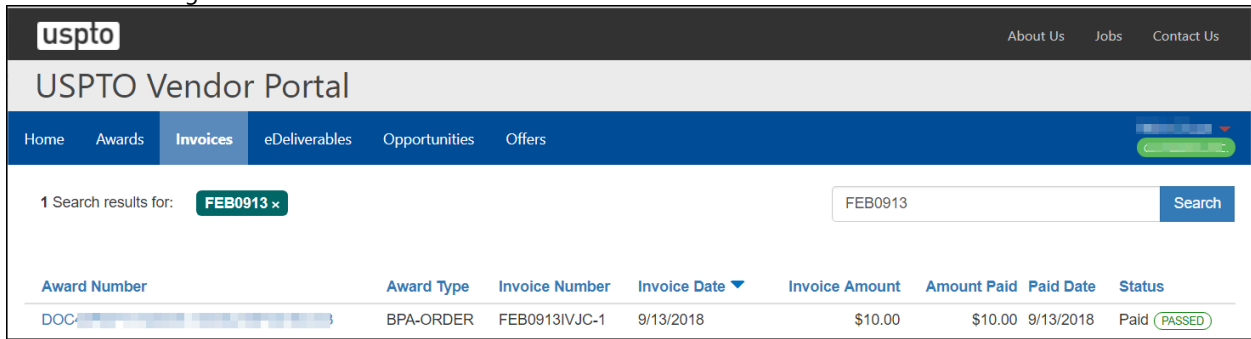
Invoices that have been submitted via the Vendor Portal will be permanently archived for easy lookup and reference. The 'Invoices' tab contains a detailed view of all invoices submitted by the vendor, including the 'Invoice Number', 'Amount', 'Status', and associated payment information.

The image below illustrates the 'Invoices' tab

uspto								About Us	Jobs	Contact Us
USPTO Vendor Portal										
Home	Awards	Invoices	eDeliverables	Opportunities	Offers					
Search... i.e., 'construction'										Search
Award Number	Award Type	Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status			
DOC [REDACTED]	BPA-ORDER	FEB0913IVJC-1	9/13/2018	\$10.00	\$10.00	9/13/2018	Paid PASSED			
DOC [REDACTED]	BPA-ORDER	IIJCINV0913-1	9/13/2018	\$1.00	\$1.00	9/13/2018	Paid			
DOC [REDACTED]	BPA-ORDER	INV091318III01	9/13/2018	\$100.00	\$100.00	9/13/2018	Paid			
DOC [REDACTED]	BPA-ORDER	INV091318III02	9/13/2018	\$50.00	\$50.00	9/13/2018	Paid			
DOC [REDACTED]	BPA-ORDER	INV091318III03	9/13/2018	\$75.00	\$75.00	9/13/2018	Paid			

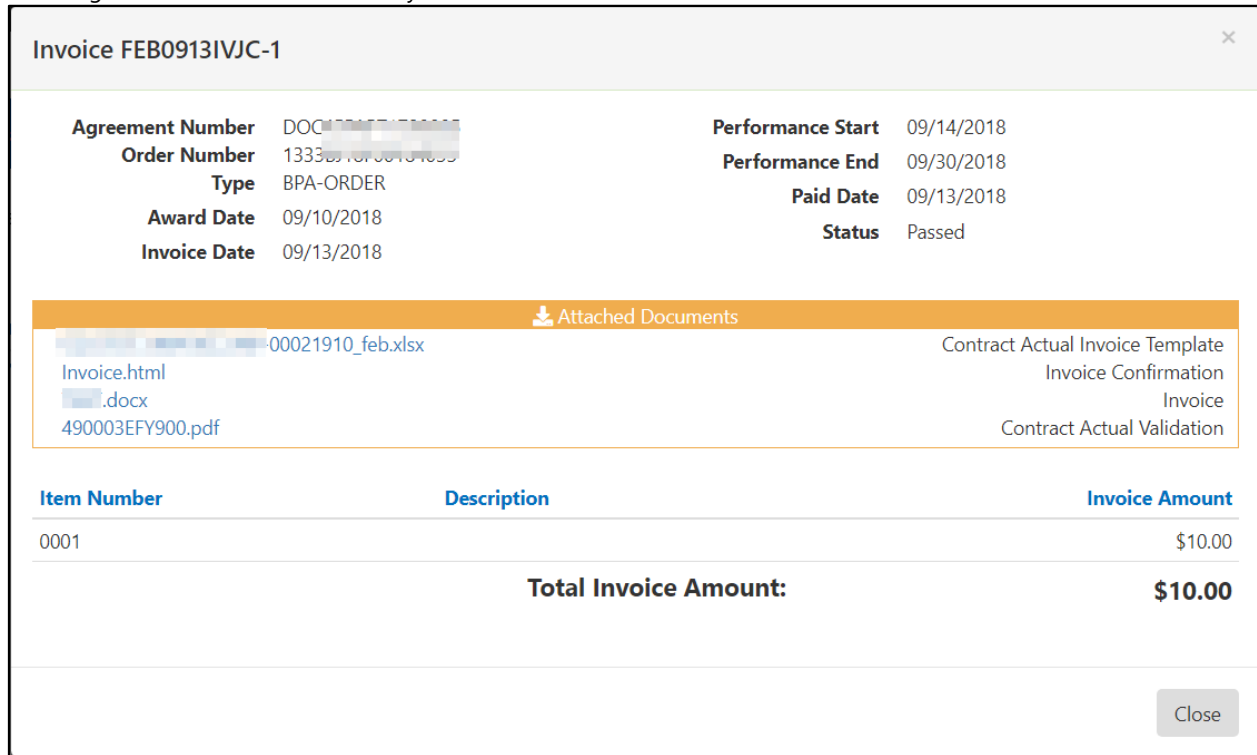
A specific invoice action can be located by entering the invoice number in the search box.

The image below illustrates an invoice number in the search box



Click on the returned result. This will display a summary of the invoice submission, including attached documents.

The image below illustrates a summary of the invoice submission



View Payment status

When a payment is made on the invoice, the status will update to 'Paid'. The 'Amount Paid' and 'Paid Date' will also be reflected.

The image below illustrates the 'Invoices' tab and applicable values for each invoice

The screenshot shows the USPTO Vendor Portal interface. The 'Invoices' tab is selected. A search bar contains the text 'I.e., 'construction''. Below the search bar is a table with the following columns: Award Number, Award Type, Invoice Number, Invoice Date, Invoice Amount, Amount Paid, Paid Date, and Status. The 'Status' column for the first row is highlighted with a red box and contains the text 'Paid (PASSED)'.

Award Number	Award Type	Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status
DOC [REDACTED]	BPA-ORDER	FEB0913IVJC-1	9/13/2018	\$10.00	\$10.00	9/13/2018	Paid (PASSED)
DOC [REDACTED]	BPA-ORDER	IJCINV0913-1	9/13/2018	\$1.00	\$1.00	9/13/2018	Paid
DOC [REDACTED]	BPA-ORDER	INV091318II01	9/13/2018	\$100.00	\$100.00	9/13/2018	Paid
DOC [REDACTED]	BPA-ORDER	INV091318II02	9/13/2018	\$50.00	\$50.00	9/13/2018	Paid

Cancelling Invoices

After submitting an Invoice either Contractor Actuals or standard, a Vendor Portal Invoice Manager has the ability to cancel this invoice (assuming it has not been processed by a USPTO employee). As a Vendor you can choose to make the decision to cancel for a number of reasons, some of these reasons are listed below:

- The amount of the Invoice is incorrect.
- The Period of Performance for the Invoice was entered incorrectly.
- The wrong type of invoice was created (Non-Contractor Actuals when Contractor Actuals was required)

If the Invoice Manager decides that a cancellation is necessary, they can highlight the record for the Invoice they wish to cancel and a red X will appear on the right side of the line.

The screenshot shows the 'IT Consulting Services' vendor portal. The 'Invoices' tab is selected. A table displays invoice records. The second row is highlighted in blue and has a red X in the status column. The 'Status' column for this row contains the text 'Submitted (PASSED)'.

Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	03/05/2021	\$10.00	\$0.00	[REDACTED]	Submitted (PASSED) X
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Total Invoiced: [REDACTED]

Once the red X has been clicked the system will automatically zero down and process the invoice in the financial system so nothing will be paid out. This will take a few moments, but

once this was successfully completed in the financial system, the Vendor Portal will update the status of the Invoice to Canceled and a red X will appear on the left side of the line indicating that the Invoice was successfully canceled.

IT Consulting Services

Order Number: [REDACTED]
Type: PO
Award Date: 12/11/2020

Invoices | eDeliverables

\$ New Invoice

Invoice Number	Invoice Date	Invoice Amount	Amount Paid	Paid Date	Status
[REDACTED]	05/10/2021	\$10.00	\$0.00		Canceled PASSED
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Total Invoiced: \$10.00

Contact Us

We'd love to hear from you! Your questions and comments about Vendor Portal help us make improvements that enhance user experience.

- For **more information** on Vendor Portal, visit us online at <https://www.uspto.gov/about-us/vendor-information/vendor-portal-information>
- For **technical support or questions** about Vendor, give us a call or send us an email.
 - VendorPortalHelp@USPTO.gov
- For questions related to Invoices, eDeliverables and Awards; please contact the USPTO Contracting Office personnel or the Contracting Officer Representative (COR) named on the award