

# FORUM FOR VENDORS – ACKNOWLEDGE AND INVOICE

Welcome to Forum, the Colorado Judicial Department’s online marketplace forming the center of judicial and public business.

This document covers the steps required to acknowledge orders received from Judicial and to invoice against those orders.

Recommended pre-requisites for this training include:

- 1 – Registering and Onboarding Forum for Vendors
- 2 - Navigating Forum for Vendors

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## PRE-RECORDED TRAINING VIDEO

The pre-recorded training videos [Order Review and Acknowledgement](#) and [Creating and Submitting an Invoice](#) can be found on the Colorado Judicial website which covers the topics in this document.

### Pre-recorded Vendor Training Sessions

[Registering and Onboarding for Vendors →](#)

[Reviewing and Approving Contracts →](#)

[Order Review and Acknowledgement →](#)

[Creating and Submitting an Invoice →](#)

### Forum Training Documents

[Registering and Onboarding in Forum →](#)

[Navigating Forum →](#)

[Orders and Invoices in Forum →](#)

[Reviewing and Approving Contracts in Forum →](#)

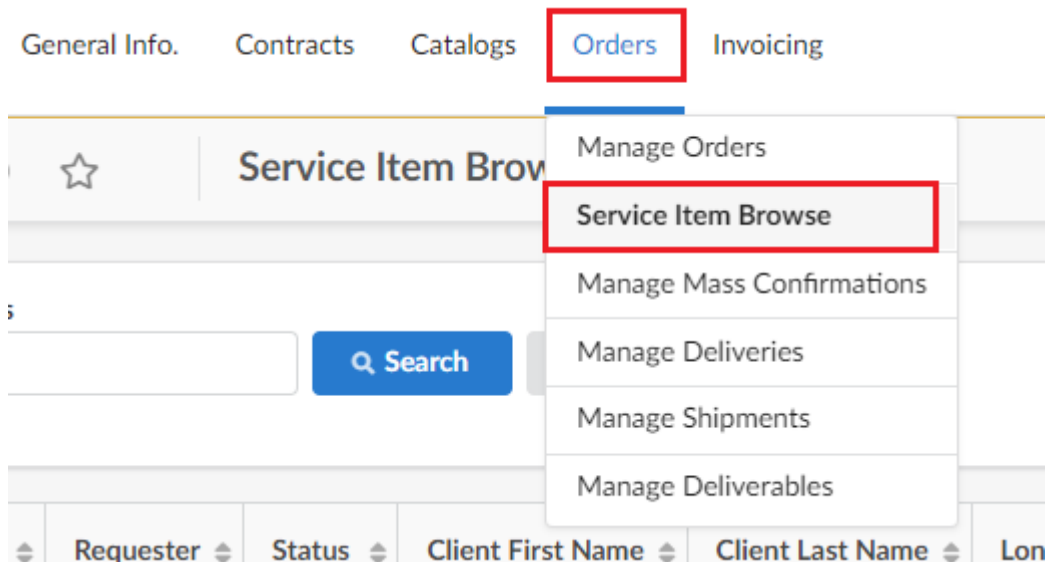
[FAQ →](#)

[Change Default Browser →](#)

## REVIEWING REQUESTED SERVICES AND BILLING DATES

The Service Item Browse page allow you to review service dates and billing expiration dates by client.

To access, click **Orders** then **Service Item Browse**.



The Service Item Browse page allows you to sort by PO#, Judicial contact, status, client, Judicial organizational unit, dates, and amounts.

| PO #       | Requester  | Status  | Client First Name | Client Last Name | Long Case # | Org Unit                   | Service Name | Product   | Service start date | Service Expiration Date | Billing Expiration Date | Total Amount | Total Co-pay amount | Invoice Amount |
|------------|------------|---------|-------------------|------------------|-------------|----------------------------|--------------|-----------|--------------------|-------------------------|-------------------------|--------------|---------------------|----------------|
| PO209107-2 | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/26/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     | 200.00         |
| PO209107-1 | Ziehr Ryan | Amended | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/26/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     |                |
| PO209107   | Ziehr Ryan | Amended | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     |                |
| PO209106   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 400.00       |                     | 200.00         |
| PO209105   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 300.00       |                     | 150.00         |
| PO209104   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 150.00       |                     | 100.00         |
| PO209103   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     | 100.00         |
| PO209102   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     | 200.00         |
| PO209101   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/20/2023          | 11/4/2023               | 12/4/2023               | 200.00       |                     | 100.00         |
| PO208096   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 2nd Denver Adult Probation | ryan PR 1    | ryan PR 1 | 9/7/2023           | 10/22/2023              | 11/21/2023              | 100.00       |                     | 520.00         |
| PO208089   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 1st Probation              | ryan PR 1    | ryan PR 1 | 8/30/2023          | 10/14/2023              | 11/13/2023              | 400.00       |                     | 100.00         |
| PO208088   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 1st Probation              | ryan PR 1    | ryan PR 1 | 8/14/2023          | 9/28/2023               | 10/28/2023              | 44.00        | 56.00               | 44.00          |
| PO208087   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 1st Probation              | ryan PR 1    | ryan PR 1 | 8/10/2023          | 9/24/2023               | 10/24/2023              | 100.00       |                     | 100.00         |
| PO208086   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 1st Probation              | ryan PR 1    | ryan PR 1 | 8/10/2023          | 9/24/2023               | 10/24/2023              | 100.00       |                     | 100.00         |
| PO208085   | Ziehr Ryan | Ordered | Probationer Name  | Case#            |             | 1st Probation              | ryan PR 1    | ryan PR 1 | 8/10/2023          | 9/24/2023               | 10/24/2023              | 100.00       |                     | 100.00         |



## ORDER ACKNOWLEDGEMENT

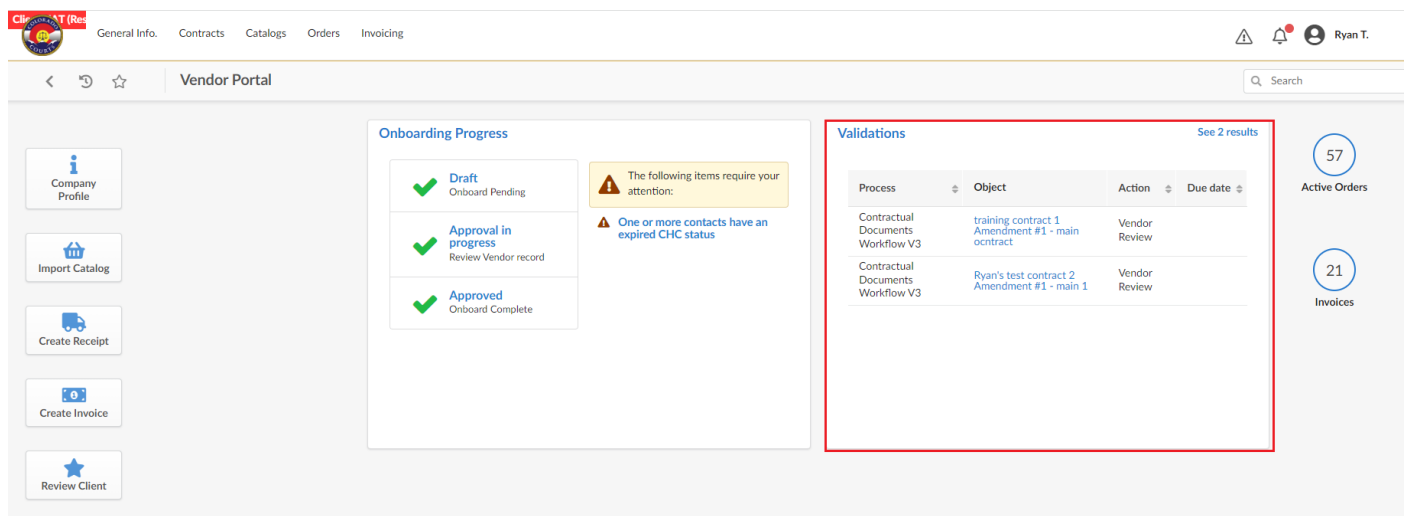
It is not required for your company to Acknowledge an order. You may invoice against any order that is within its service dates and billing period so long as the order hasn't been rejected. However, order acknowledgement is a nice feature that allows you to communicate quickly and easily with the person placing the order so that they know you will be working on the order.

To acknowledge an order, Logon to Forum and the system will bring you to the home page.

## FINDING ORDERS TO ACKNOWLEDGE

There are three ways to find existing orders that await your acknowledgement. Which you pick depends on how many and how old the orders are that you're acknowledging.

The first, is from the home page. Orders that your company has received will be shown under the Validations box. If you're acknowledging one recently received order, then this is the easiest place to start.

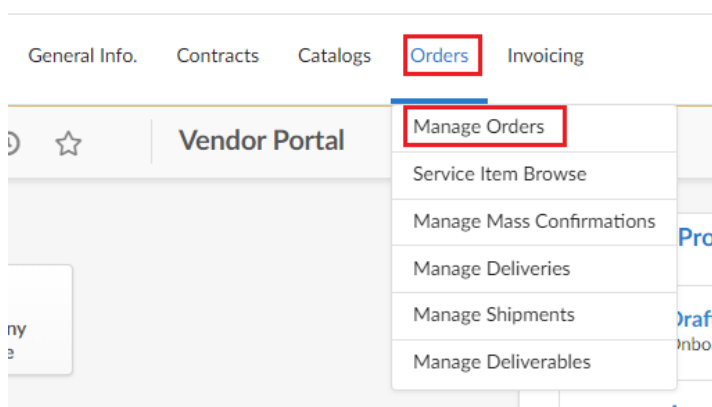


The screenshot shows the Vendor Portal interface. The top navigation bar includes 'General Info.', 'Contracts', 'Catalogs', 'Orders', and 'Invoicing'. The 'Orders' tab is highlighted. On the left sidebar, there are buttons for 'Company Profile', 'Import Catalog', 'Create Receipt', 'Create Invoice', and 'Review Client'. The main content area is divided into 'Onboarding Progress' and 'Validations'. The 'Validations' section is highlighted with a red box and contains a table with the following data:

| Process                           | Object  | Action        | Due date |
|-----------------------------------|---|---------------|----------|
| Contractual Documents Workflow V3 | training contract 1 Amendment #1 - main ocontract | Vendor Review |          |
| Contractual Documents Workflow V3 | Ryan's test contract 2 Amendment #1 - main 1      | Vendor Review |          |

On the right side of the page, there are two circular indicators: 'Active Orders' with the number 57 and 'Invoices' with the number 21.

The second, is to place your cursor over **Orders** at the top of the page and when a drop down appears click **Manage Orders**. If you would like to receive an order that is older or to get a quick update on the status of all of your orders that haven't been invoiced, but still want to Acknowledge orders one at a time, this is the best method.



The screenshot shows the 'Orders' dropdown menu in the Vendor Portal. The 'Orders' tab in the top navigation bar is highlighted with a red box. The dropdown menu is open, and the 'Manage Orders' option is highlighted with a red box. Other options in the menu include 'Service Item Browse', 'Manage Mass Confirmations', 'Manage Deliveries', 'Manage Shipments', and 'Manage Deliverables'.

## ACKNOWLEDGING A SINGLE ORDER

To acknowledge and order shown on the Validations box, simply click on the pencil to the left of the order, or on the linked text. The system will then take you to a page showing the order.

PO: PO360249 - JAYDON RAMOS -REQ2/3/2...

Reject Acknowledge Create Invoice

**Header**

Name

| Client Name | Requisition Number |
|-------------|--------------------|
|-------------|--------------------|

Vendor

Vendor Name

Organization

23rd Probation

Legal Company

Colorado Judicial

Order Date

2/3/2025

Order Expiration/Invoice Due Date ⓘ

4/17/2025

Requester

Requester Name

Vendor Contact

Vendor Contact

Payment Terms

Probationer

Probationer Name and Date of Birth

Probationer cases

Probationer Case

### KEY INFORMATION FOUND ON THE MANAGE ORDER PAGE

This page will show all the details of the order. Prior to acknowledging the order there are several items that you will want to pay special attention to. These include:

1. Dates:
  - a. Order date – No services may be billed for work done prior to the order date.
  - b. Service Expiration Date – No services may be billed for work done after the service expiration date.
  - c. Order Expiration/Invoice Due Date – All work performed must be invoiced by the Order Expiration/Invoice Due Date. If work performed is not billed by the date required, Judicial may not have the funds to pay for the services. Billing in a timely manner is critical to ensure receipt of funds.
2. Ship to – The ship to will show the location where work is to be performed.
3. Bill To – The ship to shows the District information that is placing the order.
4. Contact – Shows the person at Judicial who is the primary contact for your company.
5. Items
  - a. Label- Within the Items box the Label shows the description of services you're being asked to provide.
  - b. Quantity – Shows the quantity of services (Hours, classes, units) you're being request to perform.

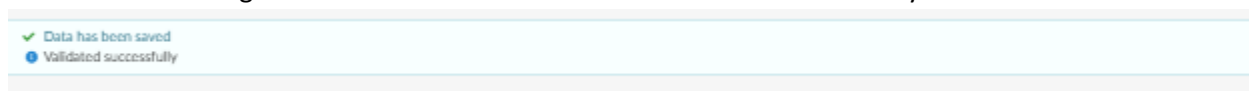
- c. Price – Shows the unit cost for the item or service.
  - d. Co-Pay amount – Shows the amount that the probation client is required to pay. Depending on the district you work with the co-pay may be required to be collected by you or by the District. Please consult your district if you're not certain of their process.
6. Attachments – Attached to the order will be the purchase order document. You may view this is you like, but this is not required. Other attachments provided by the ordering District will also appear here.

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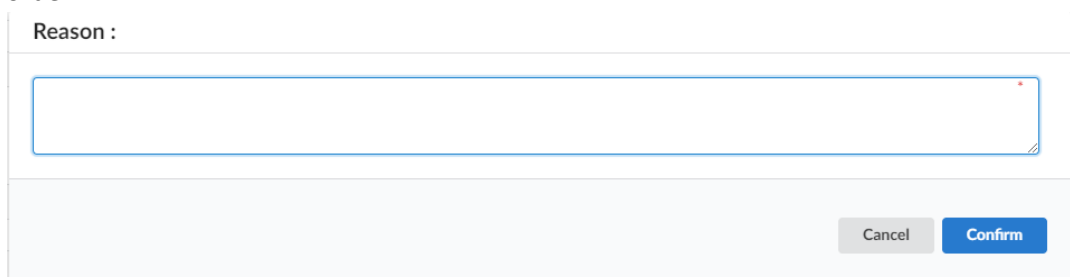
## ACKNOWLEDGING THE ORDER

Once you have read through the document you can click Acknowledge to accept the order or Reject to reject the order.

1. Clicking Acknowledge will send a receipt back to the requestor letting them know that you have received the order and plan to start performing work. When you click acknowledge a small ribbon appears at the top of your window showing that the data has been saved and validated successfully.



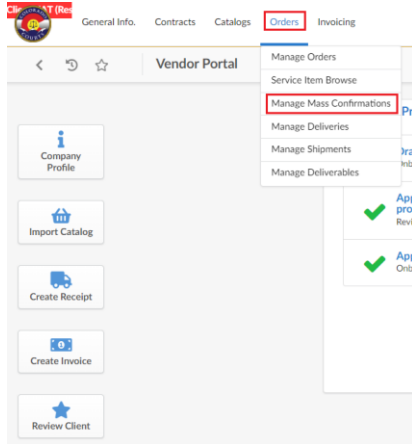
2. Rejecting an Order
  - a. When you click on reject a pop-up window appears where you may explain why you are rejecting the order.

A screenshot of a pop-up window titled 'Reason :'. It features a large text input field with a blue border and a small red 'x' icon in the top right corner. Below the input field, there are two buttons: a grey 'Cancel' button and a blue 'Confirm' button.

- b. Once you input a reason and click confirm, the order is sent back to the Judicial Requestor and lets them know that you do not intend to perform the work. If you click Reject the order will be removed from your list of orders and is considered cancelled. Don't perform any work unless a new order arrives to replace the original.

## ACKNOWLEDGING MULTIPLE ORDERS AT ONCE

To acknowledge multiple orders at the same time, start from the home page, click on orders and then on Manage Mass Confirmations.



## ACKNOWLEDGING MULTIPLE ORDERS

Once on the Manage Mass Confirmation page a list of orders that have not yet been acknowledged or invoiced will appear. Important information provided on this page includes the order number, item description, unit price and comments.

| Duplicate | Processed                | Code     | #        | Order Item Reference | Substitute Item Description | Order Qty | Order Delivery Date | Su |
|-----------|--------------------------|----------|----------|----------------------|-----------------------------|-----------|---------------------|----|
|           | <input type="checkbox"/> | PO209110 | 230348-1 |                      | ryan PR 1                   | 1.00      |                     |    |

To acknowledge multiple orders at the same time select the orders you'd like to acknowledge by checking the box under the processed column and then click the green acknowledge button near the top of the page.

## ORDER INVOICE

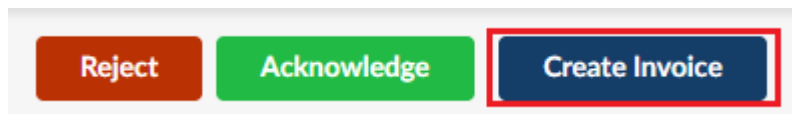
In this section, we will cover how to submit invoices. You may invoice against any order that is within its service dates and billing period so long as the order hasn't been rejected by you or cancelled by Judicial.

## INVOICE ORDERS

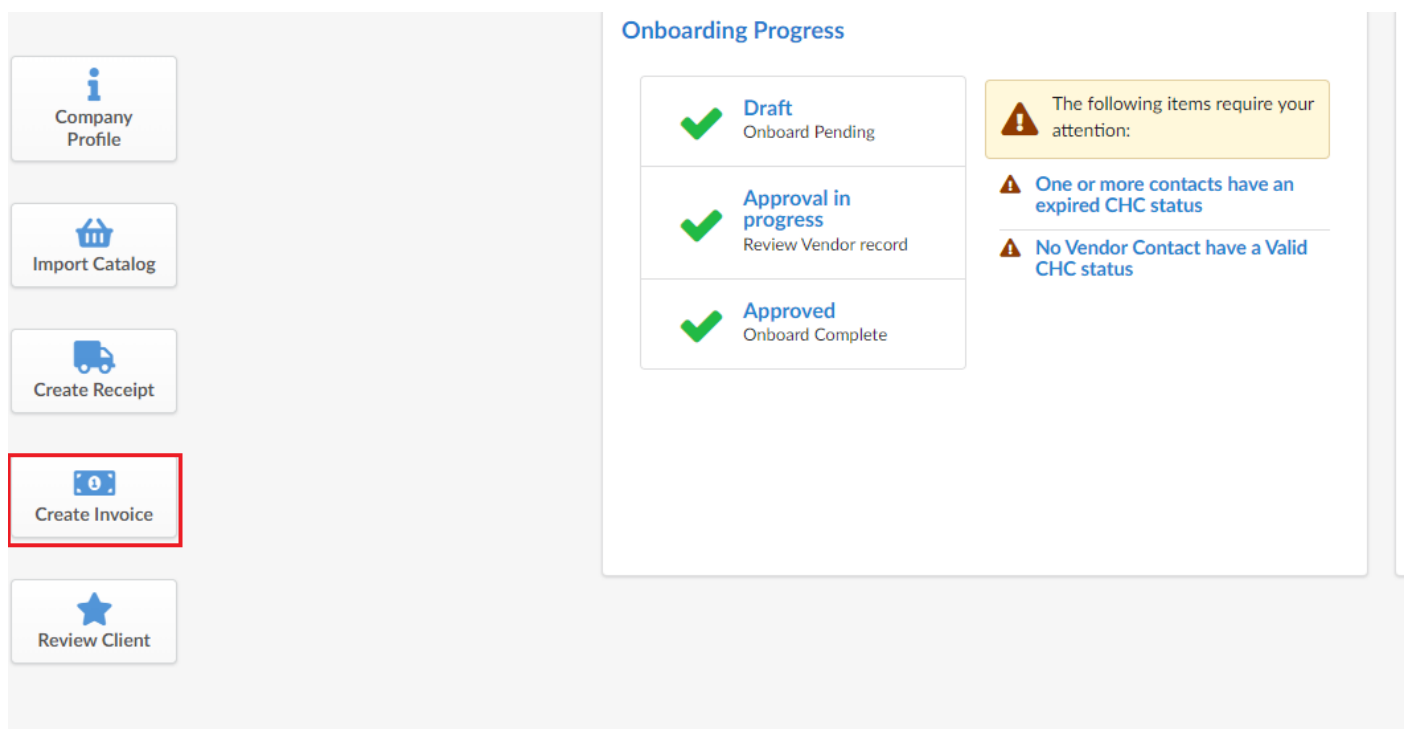
### SELECTING AN ORDER TO INVOICE

There are three methods you can use to start to create an invoice.

To start an invoice from the PO screen, click **Create Invoice** at the top of the screen.



The second is to start at the home screen and then click on **Create Invoice** on the left-hand side of the screen.



The system will take you to the invoice screen. Select the Order(s) you would like to invoice for and enter your invoice number.



### Invoice Header

**Supplier Invoice Number\***  
DO NOT USE CLIENT NAME-IN

**Invoice Date\***  
10/25/2023

Probationer

Probationer cases

**Currency\***  
USD

### Supplier Information

**Vendor**  
Ryan's test vendor

**Contact**

**Order\***

**Linked Invoice (credit)**

**Contract**

Click **Save**.

Click on the blue **Add Lines** button on the left part of the screen. In the dropdown click **Add PR/Order Items** to select the items you would like to invoice for or click **Add All Ordered Items** to invoice for all items that are on the orders that were previously selected.

**Add Lines** ▾

- + Add Non-PO Line
- + Add PR/Order Items
- + Add All Ordered Items

| Name | Due | QTY | UOM | UP Excl. Tax | Amount (Excl. Tax) | Gap | Type | Final Invoice | Commodity ID |
|------|-----|-----|-----|--------------|--------------------|-----|------|---------------|--------------|
|      |     |     |     |              |                    |     |      |               |              |

Total Amount

 USD **C**

If you clicked **Add PR/Order Items** this will open a window where you can select any orders you'd like to invoice against. Once you have selected the order(s), click **Add Selected Items**. Clicking **Add All** will have the same affect as clicking **Add All Ordered Items** as described above.

### Invoiceable order items / terms

Close
Add Selected Items
Add All

Keywords  
 Search Reset

PO:  Currency:

Show items partially or fully invoiced  View subscription's terms already invoiced

Only delivered items / terms

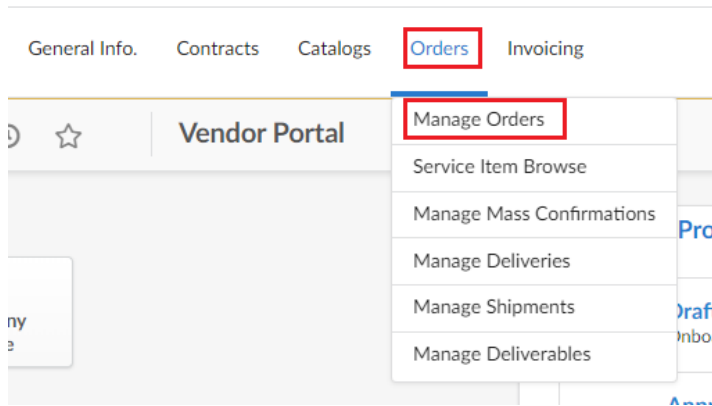
Filters PO: ORDER Currency: USD

| Code                     | Sequence | Service Name | Label     | Quantity | Unit Price | Delivered Qty | Invoiced quantity | Invoiced | Qty to be invoiced |
|--------------------------|----------|--------------|-----------|----------|------------|---------------|-------------------|----------|--------------------|
| <input type="checkbox"/> | PO209110 | 1            | ryan PR 1 | 1.00     | 50.00      | 0.00          | 0.00              | 0.00     | 1.00               |

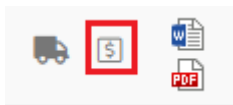
1 Record(s)

Note that you can select one or multiple orders to invoice against. You may invoice **multiple orders from the same district** under one invoice.

The third method to select an order to invoice against is to click on **Orders** and then **Manage Orders** at the top of the screen.



Once you're in the Manage Orders screen click on the dollar symbol to the right of the order that you would like to invoice.



This will automatically bring that invoice over to the invoice page.

## INVOICING ONE OR MORE SELECTED ORDER(S)

Once you've selected the order(s) you'd like to invoice for the screen below will appear.

Invoice

Save Save & Close Validate Cancel Invoice

Legal Invoice

**Invoice Header**

Supplier Invoice Number\* Invoice Date\*  
DO NOT USE CLIENT NAME-... 10/25/2023

Probationer  
Probationer cases  
Case  
Currency  
USD

**Supplier Information**

Vendor Ryan's test vendor Contact test ryan  
Order Order Linked Invoice (credit)  
Contract Ryan's test contract 2 Amendment #1

**Buyer Information**

Organization 2nd Denver Adult Probation Requisitioner Ziehr Ryan  
Ship to 1300 Broadway 80203 Denver  
Bill to 303 W Colfax Ave Dept 501

| Order | Item Name | Due | QTY  | UOM | UP Excl. Tax | Amount (Excl. Tax) | Gap | Type | Final Invoice | Commodity ID                            |
|-------|-----------|-----|------|-----|--------------|--------------------|-----|------|---------------|---|
| Order | ryan PR 1 |     | 1.00 | ea. | 50.00        | 50.00              |     |      |               | PR01 - PR01 Administrative Expenditures |

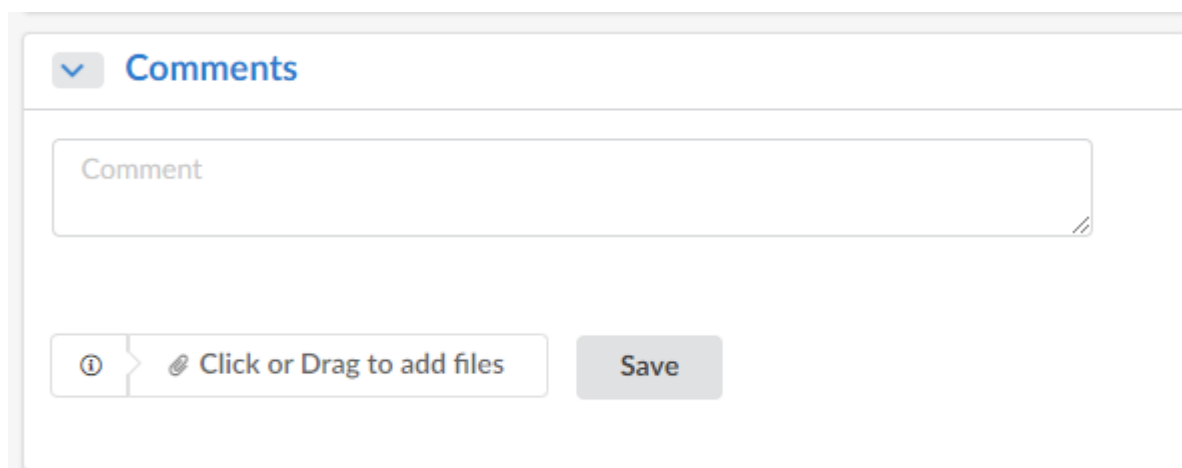
0 Record(s)

Total Amount 50.00 USD

Payment Information

To complete the invoice process, enter your unique invoice number under Supplier Invoice Number and enter the quantity you're billing for under the QTY column for the order that you're billing against. If you have a copy of an invoice that you would like to attach to the system you may drag and drop this to the Scanned Invoice box on the right-hand side of the screen. Finally, you can modify the price of the service. However, the service price may only be decreased when a contract exists, not increased.

Judicial does require some back up documentation showing that a client received services. This back up documentation can be added under the comments section near the bottom of the page. By clicking on the arrow to the left of the word Comment you can type in comments or notes you'd like to send to Judicial and drag and drop documents that confirm the client received the service.

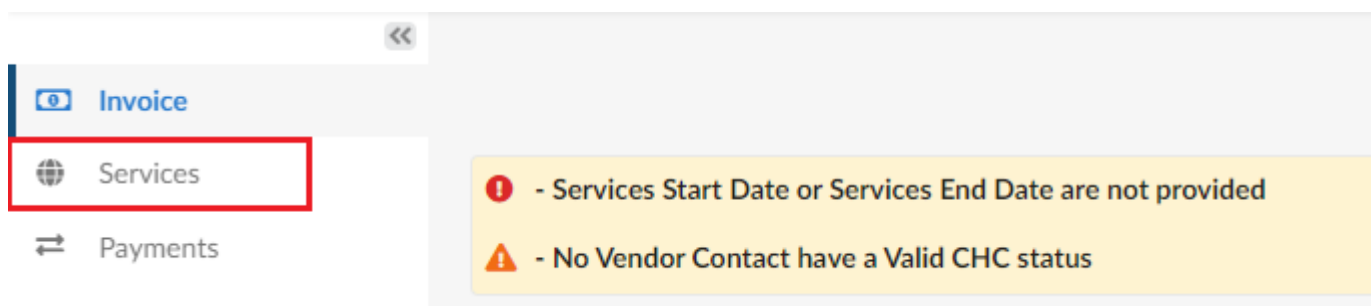


The screenshot shows a 'Comments' section with a dropdown arrow and the word 'Comments' in blue. Below this is a text input field with the placeholder text 'Comment'. At the bottom of the section, there is a button with an information icon and the text 'Click or Drag to add files', and a 'Save' button.

Once you have entered any required information above click on the **Save** button at the top of the screen.

When you click **Save**, the system creates a unique invoice number just for Forum and will also give you a warning error indicating that the services start date and services end date are the same or not provided. Judicial requires you to enter the dates when the services were delivered.

To add this information, click on the Services Icon on the left of the page.



The screenshot shows the 'Invoice' page with a sidebar on the left containing 'Invoice', 'Services', and 'Payments'. The 'Services' icon is highlighted with a red box. On the right, there are two warning messages in a yellow box: '- Services Start Date or Services End Date are not provided' and '- No Vendor Contact have a Valid CHC status'.

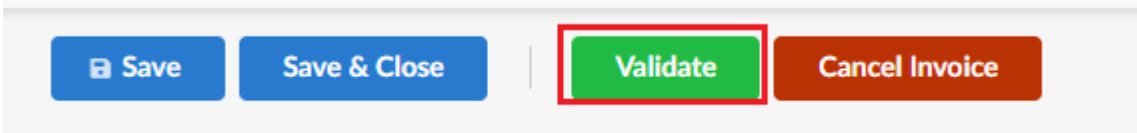
Enter the service dates for the services provided, and any comments needed.

- Services Start Date or Services End Date are not provided  
 - No Vendor Contact have a Valid CHC status

| Item Label | Product   | PO #     | Probationer ID | Actual Service Start Date | Actual Service End Date | Service start date | Service Expiration Date | Probationer First Name | Probationer Last Name | Comments |
|------------|-----------|----------|----------------|---------------------------|-------------------------|--------------------|-------------------------|------------------------|-----------------------|----------|
| ryan PR 1  | ryan PR 1 | PO209110 |                |                           |                         | 10/25/2023         | 12/9/2023               | Probationer Name       |                       |          |

1 Record(s)

Once the service dates are filled in, the invoice can be sent to Judicial. Click Validate to send the invoice.

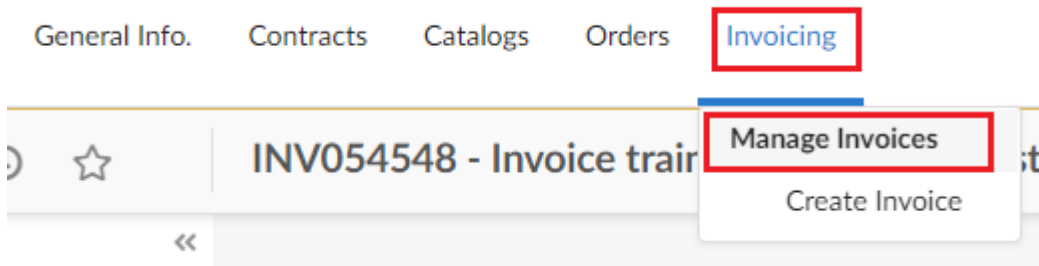


### CANCELLING AN INVOICE

If you wish to cancel an invoice, open the invoice and click **Cancel Invoice** from the top of the screen. If you wish to re-create the invoice, find the order from the *Manage Orders* menu and create a new invoice.

### IF YOUR INVOICE IS REJECTED

Invoices are approved for payment or rejected as a whole, Judicial cannot partially approve an invoice. If your invoice is rejected, you will receive an email with the reason for rejection. Your invoice will return to draft status. To re-submit a previously rejected invoice, open it from the Manage Invoices screen.



Make the necessary updates the invoice as instructed by Judicial, and re-send the invoice.

If your invoice has been sent back for corrections by Judicial the Validate button will be named Submit. After making the required corrections you can click Submit to send the invoice back to Judicial for review.

