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

CONTENTS

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 →
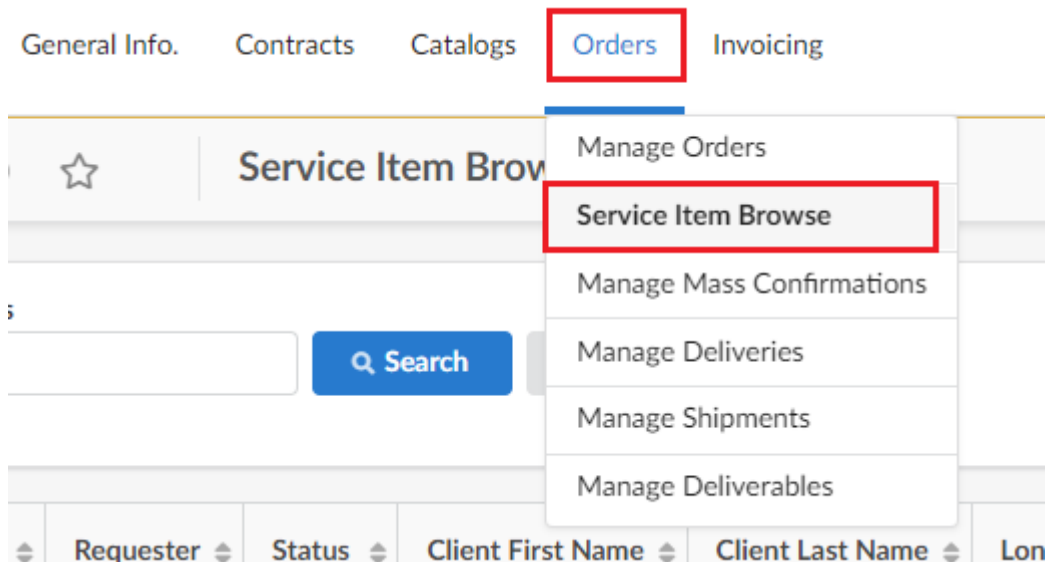
REVIEWING REQUESTED SERVICES AND BILLING DATES

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**.

General Info.   Contracts   Catalogs   Orders   Invoicing

☆   Service Item Brow

Manage Orders

Service Item Browse

Manage Mass Confirmations

Manage Deliveries

Q Search

Manage Shipments

Manage Deliverables

⇕ Requester ⇕   Status ⇕   Client First Name ⇕   Client Last Name ⇕   Lon

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

1 2 3 4 › 55 Record(s)
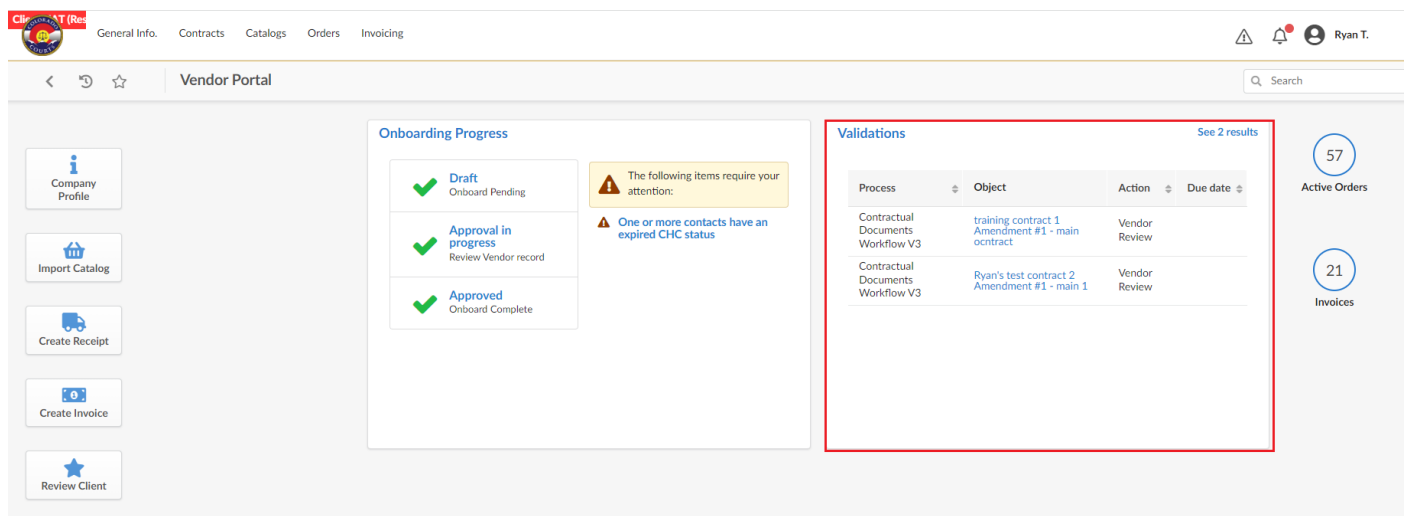
ORDER ACKNOWLEDGEMENT

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.
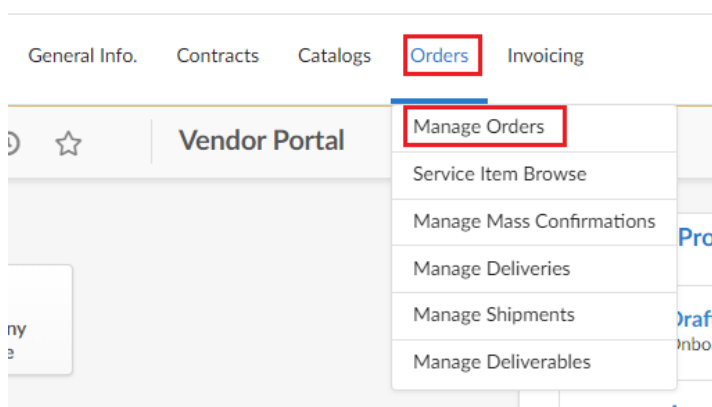

The second, is to place your cursor over **Orders** at the top of the page and when a drop down appears click **Manage Orders**. If you would like to receive an order that is older or to get a quick update on the status of all of your orders that haven't been invoiced, but still want to Acknowledge orders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

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.

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.
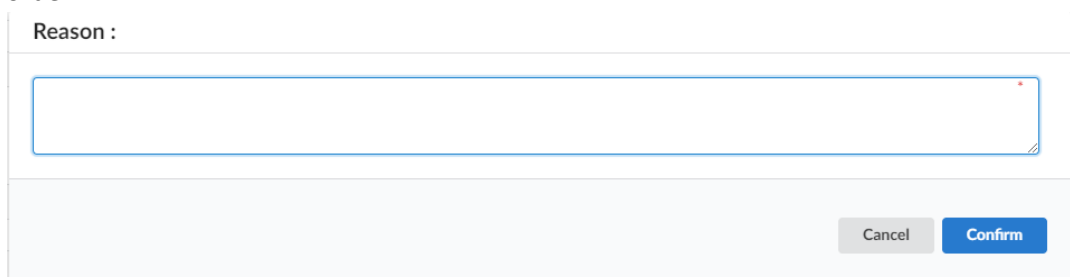

ACKNOWLEDGING THE ORDER

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.
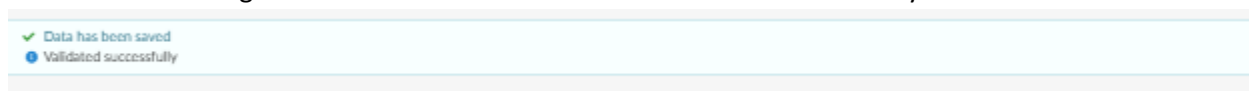

2. Rejecting an Order

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

      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.
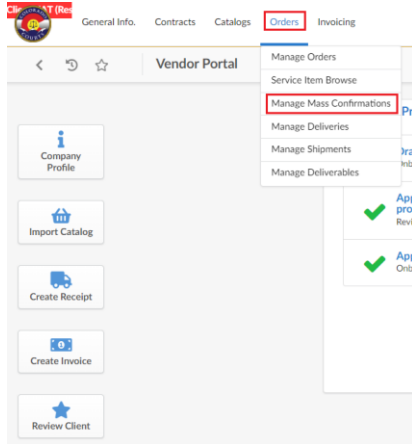
ACKNOWLEDGING MULTIPLE ORDERS

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.

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.
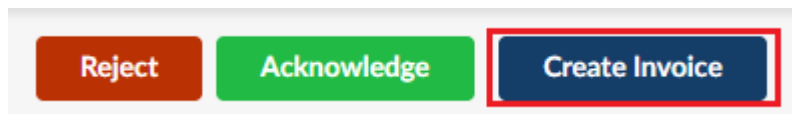
ORDER INVOICE

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.
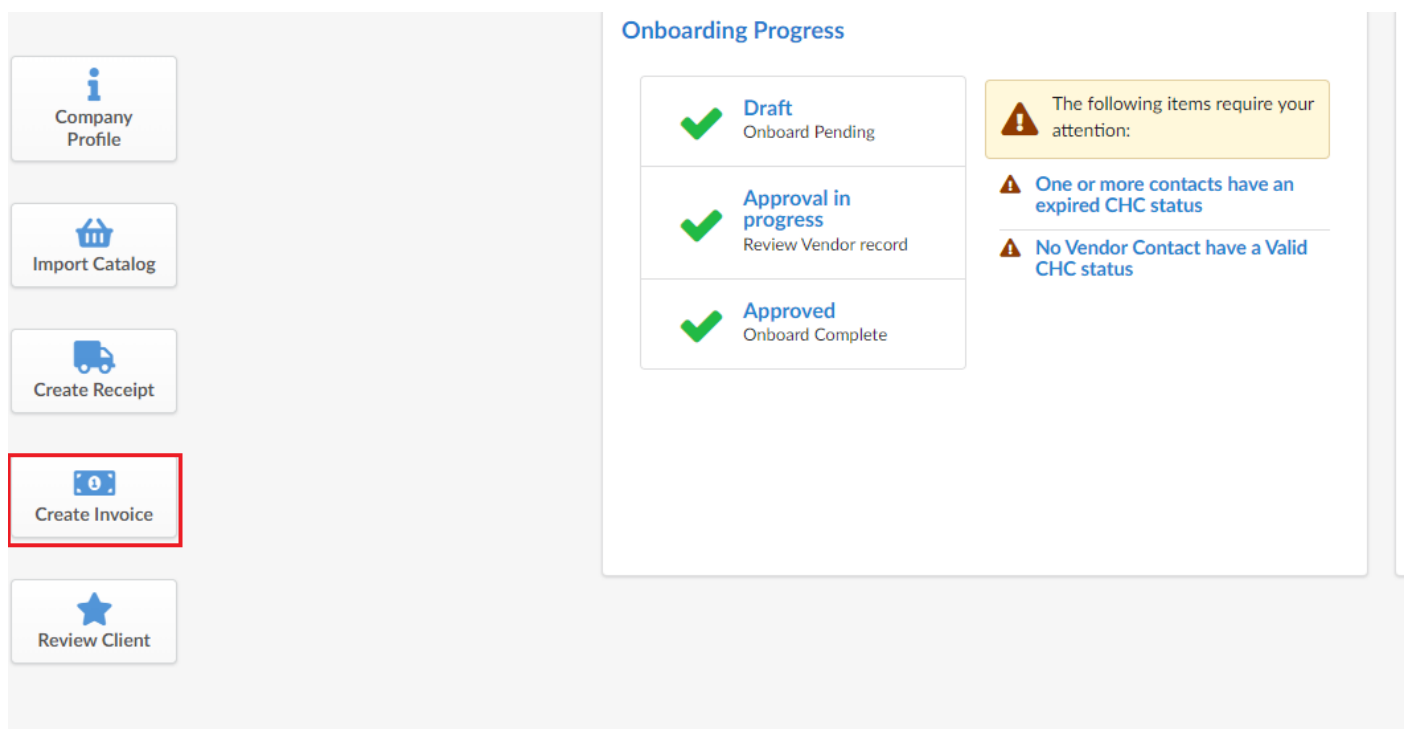
INVOICE ORDERS

SELECTING AN ORDER TO INVOICE

There are thee 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.

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.

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.

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.
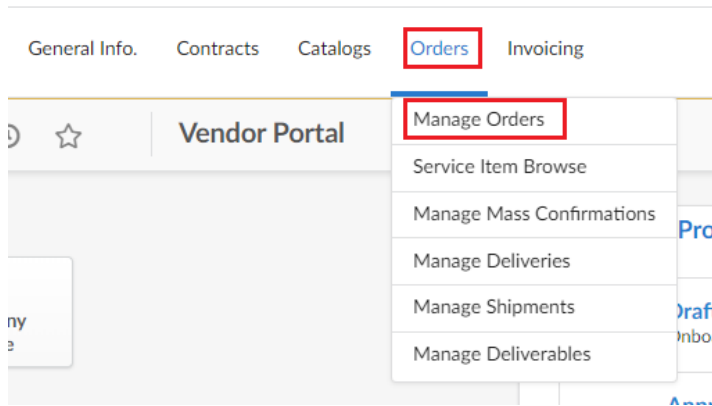
Once you're in the Manage Orders screen click on the dollar symbol to the right of the order that you would like to invoice.
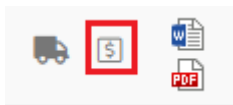
This will automatically bring that invoice over to the invoice page.

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.

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.
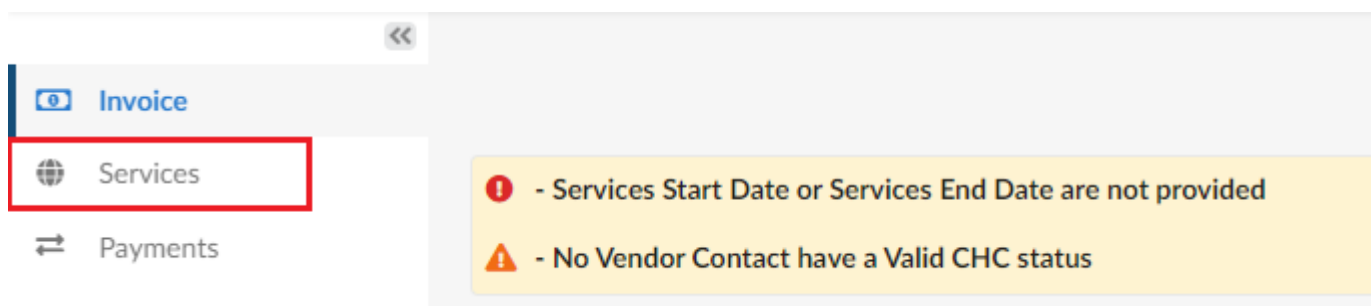

Once you have entered any required information above click on the **Save** button at the top of the screen.

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.

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

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.
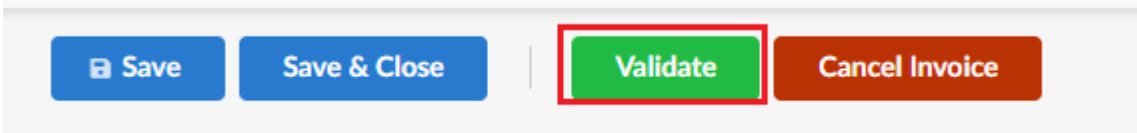
CANCELLING AN INVOICE

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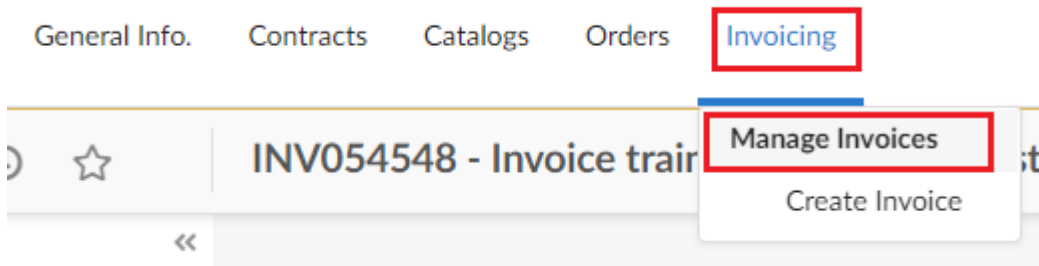
Make the necessary updates the invoice as instructed by Judicial, and re-send the invoice.

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.