



# Twitter Supplier Portal Overview

## Twitter's Supplier Portal allows you to:

- Manage changes to your account information (such as bank details, address, contact information)
- View all open and closed Purchase Orders (POs) issued by Twitter
- Create and submit Invoices for Twitter directly - no emails required
- Review upcoming and past payment dates
- Ask questions about POs, invoices and payments

This guide provides an overview of how to use these features within Supplier Portal.

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## Home Screen

After logging into Supplier Connect, the home screen will default to the **Purchase Orders** tab.

From the home screen, you can review the **FAQs (Frequently Asked Questions)** for additional information, ask us a question via **Q&A**, and switch languages.

PO#	Status	Approved Date	Currency	Amount	Rem. Amount	Contact	Operating Unit
12345678/0 Standard PO	Open	10/09/2018	USD	21,640.00	21,640.00	Larrybird@twitter.com	Twitter, Inc.
12345678/0 Standard PO	Open	10/05/2018	USD			Larrybird@twitter.com	Twitter, Inc.

**Q&A**

No comments yet!

Comment here...

**FAQs**

How can I update my company's account info?

Click on "COMPANY INFO" on the top row. You can update any part of your company's record in the sub-sections:

- Company Information (Company Name / Tax ID)
- Location Information (Corporate Address/ Remittance address)
- Contact Information (Update/ add email)
- Bank Information

## Purchase Orders

The **Purchase Orders (POs)** tab shows all POs issued to a company and allows you to create an Invoice.

Both open and closed POs will be listed. To view a specific PO, click on the **PO#**.

PO#	Status	Approved Date	Currency	Amount	Rem. Amount	Contact	Operating Unit
12345678/0 Standard PO	Open	10/09/2018	USD	21,640.00	21,640.00	Larrybird@twitter.com	Twitter, Inc.

## Viewing PO Details

The PO screen shows all information related to a given PO in three sections: **PO Details**, **Attachments**, and **Related Invoices, Unapproved Invoices and Related Cases**.



### PO Details:

- Twitter bill-to entity details
- PO status (open, closed)
- Line item information about the order (description, quantity, amount, currency)
- For open POs, open amounts remaining on the order

Download a PDF copy of the PO from the **Attachments** section by clicking on the file name.

PO List > 12345678/0 Create Case Create Invoice

Twitter  
Larry Bird

Bill To  
1355 Market Street, Suite  
900  
San Francisco, CA US

Ship To  
TWITTER, INC  
NEW YORK, NY US

Status Open  
PO Date 12345678/0

Item Description	Quantity	Unit ...	Curr...	Amount	Remainin...
Larry Bird Jump Festival	21,640	1	USD	21,640	21,640

<b>SUB TOTAL</b> USD 21,640	<b>TAX</b> USD 0	<b>TOTAL</b> USD 21,640
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For a given PO, scroll down to review **Related Invoices**, **Unapproved Invoices** and **Related Cases** (section below PO Attachments):

- **Related Invoices** shows all invoices successfully processed against the PO
- **Unapproved Invoices** shows invoices received but not yet approved or processed for payment against the PO
- **Related Cases** shows any questions raised about the PO via the Q&A tool

Related Invoices	Unapproved Invoices	Related Cases					
Invoice#	Payment Status	Invoice Date	Due Date	Paid Date	Currency	Invoice Amount	Paid Amount
12345	Fully Paid <span>Paid</span>	05/04/2018	06/18/2018	06/14/2018	USD	12,017.59	12,017.59

### Create an Invoice

Create an Invoice for Twitter for an Open PO from the details screen by clicking **Create Invoice**. The Invoice will be pre-populated with the PO details. An Invoice Number is required. Invoice



date can be updated to reflect new invoice by clicking **Invoice Date**. Lines can be removed by clicking the red X. An Attachment is required and must match the information provided.

PURCHASE ORDERS INVOICES PAYMENTS CASES CHANGE REQUESTS COMPANY INFO DOCUMENTS

PO List > 12345678/0 > Create Invoice Save Discard Submit

PO#: 12345678/0  
Freight Terms:  
Payment Term: 45 NET  
Due Date: 05/02/2019

Larry Bird LLC  
Larry Bird  
San Francisco, CA 94103

Bill To  
1355 Market Street, Suite 900  
San Francisco, CA US

Invoice#  
Invoice Date  
03/18/2019

Add Line

PO Line#	Item Description	Quantity	Unit Price	Currency	
1	Larry Bird Jump Festival	21,640	1	USD	X
	VAT/GST	1	0	USD	X
	Shipping	1	0	USD	X

SUB TOTAL	OTHER	TOTAL
USD 21,640	USD 0	USD 21,640

Attachments (Invoice and any supporting documents) New Attachment

Document Name	Uploaded On
 No Attachments No attachments added to this invoice	

Additional PO lines can be added by clicking **Add Line**. Additional line items can be added but only after the original line quantity is updated. Invoice lines items must match PO line items so no new items can be added.

PO Line#	Item Description	Quantity	Unit Price	Currency
1	Larry Bird Jump Festival	640	1	USD
	VAT/GST	1	0	USD
	Shipping	1	0	USD
1	Larry Bird Jump Festival	21,640	1	USD

SUB TOTAL	OTHER	TOTAL
USD 22,280	USD 0	USD 22,280



Click on **Save** to return to this Invoice later. Click on **Submit** to send this Invoice to Twitter. Click on **Discard** delete this Invoice

## Invoices

The **Invoices** tab shows all invoices received by Twitter. Invoices in pending status will appear at the top, followed by paid invoices. Each invoice listed will show:

- Invoice #
- Invoice date, received date and payment date
- Related Twitter PO number
- Currency of invoice payment
- Amount paid
- Twitter entity

To view a specific invoice, click on the **Invoice #**.

PURCHASE ORDERS	INVOICES	PAYMENTS	CASES	CHANGE REQUESTS	COMPANY INFO	DOCUMENTS		
Q Search Invoices... <span>↻</span>								
Invoice#	Type	Invoiced	Invoice Received	Paid Date	PO#	Currency	Amount	Operating Unit
123456 Paid	Standard	09/11/2018	09/11/2018	10/08/2018	12345678	USD	2,713.30	Twitter Australia Holdings Pty Limited

### Viewing invoice details

The invoice screen shows all information related to a given invoice. Click on the **Related Invoices** tab to view a PDF copy of the invoice Twitter processed.



PURCHASE ORDERS INVOICES PAYMENTS CASES CHANGE REQUESTS COMPANY INFO DOCUMENTS

Invoice List > Invoice # 123456 Create Case

Invoice Number: 123456  
PO Number: 45678901  
Bill To: Twitter Australia Holdings Pty Limited, Sydney, 2000 AU  
Ship To: Twitter Australia Holdings Pty Limited, Sydney, 2000 AU  
Operating Unit: Twitter Australia Holdings Pty Limited  
Invoice Date: 09/11/2018  
Due Date: 10/11/2018  
Payment Date: 10/08/2018

Item	Item Description	Quantity	Unit Price	Currency	Amount
Q3 APAC Swag Budget	Q3 APAC Swag Budget	2713	1	USD	2713
Q3 APAC Swag Budget	Q3 APAC Swag Budget	0.3	1	USD	0.3

**SUB TOTAL** USD 2,713.3      **TAX** USD 0      **TOTAL** USD 2,713.3

Attachments

File Name	Created on
larrybird.pdf	09/13/2018

Holds    Related Payments    Related Cases

For a given Invoice, scroll down to review **Holds**, **Related Payments** and **Related Cases** (section below Invoice Attachments):

- **Holds** shows any invoice related issues
- **Related Payments** information related to that particular invoice
- **Related Cases** shows any questions raised about the PO via the Q&A tool

## Payments

The **Payments** tab shows all payments made by Twitter. Click on the **Payment #** to view details about the payment.

Open Purchase Orders 59    PURCHASE ORDERS    INVOICES    PAYMENTS    CASES    CHANGE REQUESTS    COMPANY INFO    DOCUMENTS

Recent Payments 449    Q Saved Searches    Status is Paid    Search Payments...

Invoices Pending Review 1

Payment#	Payment Method	Payment Date	↓ Curre...	Cleared Amount	Vendor Site	Operating Unit
12345678901 Reconciled	Twitter Intl Wires	12/21/2016	USD	8,544.32	LOS ALTOS-CA	Twitter France SAS

Review payment details and related Invoices.



Payment List > Payment # 98765432101 Create Case

**Payment Information**

Payment Date December 21, 2016	Status Reconciled	Bank Account TFR_BOFA_US_USD_1234
Due Date December 22, 2016	Payment Method Twitter Intl Wires	Amount 8,544.32 USD

**Supplier Information**

Supplier Larry Bird	Remit to Supplier Larry Bird LLC	Address 1355 Market Street San Francisco, CA 94103
Supplier Site LOS ALTOS-CA	Remit to Supplier Site LOS ALTOS-CA	

**Related Invoices**

Invoice#	Invoice Amount	Invoice Currency	Invoice Date	Description
12345	8,544.32	USD	10/24/2016	Cust ID: Twitter - Larry Bird

## Cases

The **Cases** tab shows a history of questions asked within Supplier Portal about POs, Invoices and other queries. Click on **New Case** to ask a new question.

PURCHASE ORDERS INVOICES PAYMENTS **CASES** CHANGE REQUESTS COMPANY INFO DOCUMENTS

Q Search Cases... New Case

Case#	Category	Related To	Status	Open Date	Subject
CS141	PO Related Update PO	65000231	Open MEDIUM	02/01/2019	test case

If **Create Case** is selected while reviewing a specific area (PO, Invoice, General, etc.), those details will be pre-populated in the case.



Invoice List > Invoice# 123456 Create Case

Invoice Number: 123456  
Bill To: .  
Ship To: .  
Operating Unit: Twitter, Inc.  
PO Number: .  
Invoice Date: 10/04/2018  
Due Date: 11/18/2018  
Payment Date: .

Item	Item Description	Quantity	Unit Price	Currency	Amount
Larry Birds Jump Festival - Birds Nest Beanies	Larry Birds Jump Festival - Birds Nest Beanies March 5...	0	1	USD	0
Larry Birds Jump Festival - Birds Nest Beanies	Larry Birds Jump Festival - Birds Nest Beanies March 5...	7600	1	USD	7600
Shipping				USD	496.43

**SUB TOTAL** USD 8,096.43      **TAX** USD 0      **TOTAL** USD 8,096.43

Fill out all relevant information to allow Twitter to answer questions quickly. Emails will be sent to related contacts when Twitter has responded. Click on **Submit** to send your question to Twitter.

Invoice List > Invoice# 123456 > Create Case Submit

Category: Invoice Related \*

Sub Category: Select... \*

Invoice Number: 123456 \*

Title: Summarize the issue \*

Description: Describe the issue in details \*

Attachments New Attachment

Name	Created on



## Change Request

Any changes or updates made under **Company Info** will be logged here. Changes with a Status of “Pending” are under review by Twitter. Changes approved by Twitter will have an “Approved” Status, whereas rejected changes will have a “Rejected” Status.

Changes cannot be made to any Pending Change Requests. Instead, select **Cancel** and edit the desired information from the **Company Info** tab again. The original Request will have a status of “Cancelled.”

PURCHASE ORDERS	INVOICES	PAYMENTS	CASES	CHANGE REQUESTS	COMPANY INFO	DOCUMENTS
Q Search Change Requests... <span>↻</span>						
CR#	Type	Requested By	Requested Date	Status		
CR881	Contact <b>New</b>	Larry Bird	03/08/2019	Pending	Cancel	
CR880	Location <b>Update</b>	Larry Bird	03/08/2019	Pending	Cancel	
CR879	Location <b>New</b>	Larry Bird	03/07/2019	Cancelled		
CR878	Contact <b>New</b>	Larry Bird	03/07/2019	Pending	Cancel	

## Company Info

The **Company Info** tabs displays the details shared with Twitter during Onboarding. Selecting a sub-tab allows you to review these details, and add or make any necessary changes to Company Information, Locations, Contacts, Banks and Attachments.

### Editing Company Information

After any changes are made to the detail on the **Company Information** tab, click on **Save** for Twitter to review and acknowledge these changes in our records, or discard changes by clicking on **Reset**.



PURCHASE ORDERS INVOICES PAYMENTS CASES CHANGE REQUESTS COMPANY INFO DOCUMENTS

Company Information Locations Contacts Banks Attachments

Company Information Save

Supplier Name Larry Bird LLC *	Alternate Name
Supplier Type Supplier	Tax Identification No 12-34567890
Industrial Classification Select...	

## Adding and Editing new Locations

Click on **New** to add a Location and enter all required fields (marked with an \*). Click on **Save**. A Success pop up bubble will be displayed to confirm Twitter's receipt of the request.

The details that were requested will show a "Pending" status while our team reviews this change and can be tracked on the **Change Request** tab. Once Twitter has reviewed and approved the Status will show as "Active."

PURCHASE ORDERS INVOICES PAYMENTS CASES CHANGE REQUESTS COMPANY INFO DOCUMENTS

Company Information **Locations** Contacts Banks Attachments

Locations  3 Locations Refresh New

Address Name	Address	Country	Status	Purpose	Communication
San Francisco, CA	1355 Market Street San Francisco, CA 94103	United States	PENDING	<span>Purchasing</span> <span>Payment</span>	@larrybird@twitter.com
San Francisco, CA	1355 Market Street San Francisco, CA 94103	United States	Active	<span>Purchasing</span>	 @larrybird@twitter.com
San Francisco, CA	1355 Market Street San Francisco, CA 94103	United States	Active	<span>Purchasing</span> <span>Payment</span>	 @larrybird@twitter.com

After any changes are made to Location details, click on **Save** for Twitter to review and acknowledge these changes in our records (tracked on the **Change Request** tab).

Need to remove a location? Open a Case and request the end date of a location.



## Adding and Editing New Contacts

On the **Contacts** tab, click on **New** to add a Contact and complete all details (First and Last Name and Email are required).

The screenshot shows a navigation bar with tabs: PURCHASE ORDERS, INVOICES, PAYMENTS, CASES, CHANGE REQUESTS, COMPANY INFO, and DOCUMENTS. Below this is a sub-menu with icons for Company Information, Locations, Contacts (selected), Banks, and Attachments. The main content area is titled 'Contacts' and features a search bar labeled 'Filter Contacts...', a refresh icon, and a 'New' button. A table below lists contacts with columns: Name, Department, Title, Status, Email, and Phone. One contact is visible: Larry Bird, with Status 'Active' and Email 'Larrybird@twitter.com'.

On the Contact Details, selecting the **Required Portal Access** will allow the Contact to access the Supplier Portal. Those Contacts with the **Required Portal Access** checkbox not checked will only serve as helpful information for Twitter.

A company with multiple locations can associate a **Contact** with one of their locations; click on **New** and select a location from the dropdown menu.

The screenshot shows the 'Contact Details' form. At the top, there are navigation tabs: Company Information, Locations, Contacts (selected), Banks, and Attachments. The form has a 'Save' button and a 'Back to Contacts' link. The form fields are: First Name (LARRY), Last Name (BIRD), Email (LARRYBIRD@TWITTER.COM), Telephone, Require Portal Access (checked), and End Date (12/31/2024). Below the form is a section for 'Associated Locations' with a 'New' button and a table with columns: Address Name, Status, and End Date.

Update **Contacts** and provide access to the Supplier Portal by selecting the **Required Portal Access**.



After any changes are made to **Contacts**, click on **Save** for Twitter to review and acknowledge these changes in our records (tracked on the **Change Request** tab). Only after Twitter has approved new Contacts with the **Required Portal Access** checkbox checked will they receive their login credentials; their Status will show as “Active.”

Need to remove a contact? Add an **End Date** on their Contact Details.

## Adding and Editing Banks

Add or update **Banks**. After any changes are made to the detail within Banks, click on **Save** for Twitter to review and acknowledge these changes in our records (tracked on the **Change Request** tab).

When entering in New bank information, once routing number is entered it will auto populate Bank Name, Branch Name, Address, City, State and Zip Code.

Need to remove bank info? Open a Case and request an end date of a bank.

Bank Name	Branch Name	Account	IBAN	Currency	Status	Account Name
Bank of America	BANK OF AMER...	XXXXXX1234		USD	Active	Larry Bird

Require Intermediary Bank Details <input type="checkbox"/>	Are International Payments Allowed? <input checked="" type="checkbox"/>	Payment Method Select...	Account Type CHECKING x
Country United States x	Accepted Currency USD x	Routing Number 123456789 *	SWIFT Code ABCD1234
Bank Name BANK OF AMERICA, N.A. *	Branch Name	Account Number 1234567890 *	Beneficiary Name LARRY BIRD *
Address1 1355 MARKET STREET	City SAN FRANCISCO	State CA	Zip Code 94103



## Adding Attachments

Click **New** to add any **Attachments**, for example any legal or tax documents. Select a Category, **From Supplier** - a company sharing documents with Twitter or **To Supplier** - Twitter sharing documents with a company and add a **Title**. Drag or Upload file and click on **Save**. Once attached, the file can be downloaded.

All **Attachments** will also be available under the **Documents** tab.

Need to delete attachment? Open a Case

Title	Description	Category	Creation Date	Created By	Attachment Name
TESTING		From Supplier	March 08, 2019	Larry Bird	1.pdf
TESTING		To Supplier	March 08, 2019	Larry Bird	1.pdf

## Documents

View and download documents attached by Twitter or a company. Click **New** to add any attachments. Select a Category, choose **From Supplier** - a company sharing documents with Twitter or **To Supplier** - Twitter sharing documents with a company and add a **Title**. Drag or Upload file and click on **Save**.

Any documents attached on the **Documents** tab will not show on the **Attachments** tab under **Company Info**.



### Add Attachment ✕

Category \*  
Select... ▼

Title \*

Description

 **Drag/Upload File**

PURCHASE ORDERS   INVOICES   PAYMENTS   CASES   CHANGE REQUESTS   COMPANY INFO   DOCUMENTS					
Search...					<input type="button" value="New"/>
Title	Description	Category	Creation Date	Created By	Attachment Name
1056318.pdf	PDF Invoice Image	Invoice Internal	10/11/2018	MARKVIEW	 1056318.pdf
1055160.pdf	PDF Invoice Image	Invoice Internal	10/10/2018	MARKVIEW	 1055160.pdf
PO_81_10120631...		Documents	10/09/2018	AUTOINSTALL	 PO_81_10120631_0_US.pdf
1051387.pdf	PDF Invoice Image	Invoice Internal	10/09/2018	MARKVIEW	 1051387.pdf

## Customizing Views

### Customizing the Purchase Orders View

Use the **Search** box to find specific for POs and, filter your POs based on any PO criteria:

- PO Number
- Status (Open, Closed)
- Approved Date
- Amount
- Requestor (the Twitter business owner of the PO)
- Buyer
- Type



**PRO TIP:.** Use **Any Of** as an “OR” search criteria operator, and or **None Of** as a “DOES NOT CONTAIN” search criteria operator.

The screenshot shows a search results table for 'Open Purchase Orders'. A dropdown menu is open over the search bar, listing options: Public Views, Open Purchase Orders, My Views, None, Hide Search, Update View, Reset to Default, and Create New View. The table below has columns: PO#, Status, Approved Date, Currency, Amount, Rem. Amount, Contact, and Operating Unit. It contains three rows of data.

PO#	Status	Approved Date	Currency	Amount	Rem. Amount	Contact	Operating Unit
10	Open	10/09/2018	USD	21,640.00	21,640.00	Bird, Larry Larrybird@twitter.com	Twitter, Inc.
10	Open	10/05/2018	USD			Bird, Larry Larrybird@twitter.com	Twitter, Inc.
45	Open	10/05/2018	USD	19,000.00	19,000.00	Bird, Larry Larrybird@twitter.com	Twitter France SAS

The screenshot shows a search results table with a filter 'PO Number contains 620' applied. The search bar contains 'TESTING'. The table has columns: PO#, Status, Approved Date, Currency, Amount, Rem. Amount, Contact, and Operating Unit. It contains one row of data.

PO#	Status	Approved Date	Currency	Amount	Rem. Amount	Contact	Operating Unit
12345678/0 Standard PO	Open	10/05/2018	USD	8,390.20	0	Bird, Larry	Twitter, Inc.

## Saving a search

Save a search by selecting “**Create New View**” under the Search drop down box.

The screenshot shows a search results table with a filter 'Status is Open' applied. The search bar contains 'Saved Searches'. A dropdown menu is open over the search bar, listing options: Public Views, None, My Views, None, View Search, Update View, Reset to Default, and Create New View. The 'Create New View' option is highlighted with a red box. The table below has columns: Status, Approved Date, Currency, Amount, Rem. Amount, Contact, and Operating Unit. It is currently empty, showing a 'Purchase Orders' icon and the text 'No Purchased Orders yet.'

Status	Approved Date	Currency	Amount	Rem. Amount	Contact	Operating Unit
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Name the New View, and decide if this View should be:

- Public (shared with others in your Company that also have access to the Portal)
- Default (displayed on login)

Save the View.



Create New View ✕

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Name  
Open Purchase Orders \*

Slide below to make this view private  
 Public  Private

Slide below to make this view your default view  
 Default  Default

Search Criteria

Status is Open

Supplier Connect offers the ability to search and create new views from any tab (Invoice, Payments, etc.).