onPhase Supplier Manual

Revision Date: 11/01/2025

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Purpose of This Document

This document is designed for use/reference by suppliers who have already signed up as an onPhase user. This document explains how to use onPhase to create and submit invoices to BWL. If you have not yet signed up with onPhase, please refer to the BWL's Supplier Resource Center Site: https://www.lbwl.com/about-bwl/supplier-resource-center for guidance.

As a reminder, all invoices require a valid Purchase Order (PO) number or Contract number for submission. This is the only way an invoice can be validated for payment. Entering an invoice, as described in this manual, is a quick, straight-forward process assuming you have your PO or Contract number.

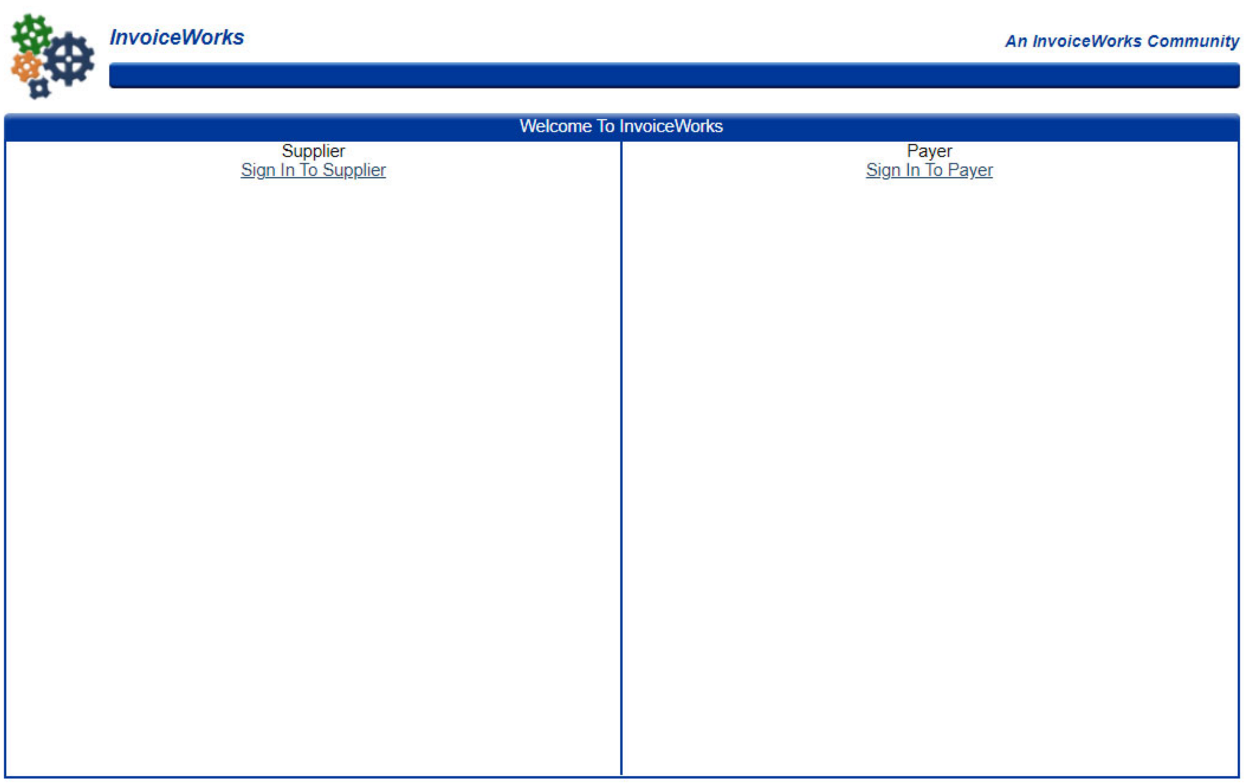
A BWL PO number is a 10-digit number that begins with "45". Invoices containing a PO number will be entered using the "PO Invoice Entry" method outlined in section 2 of this manual.

A BWL contract number is a 10-digit number that begins with "46". Invoices containing a contract number will be entered using the "Non-PO Invoice Entry" method outlined in section 3 of this manual.

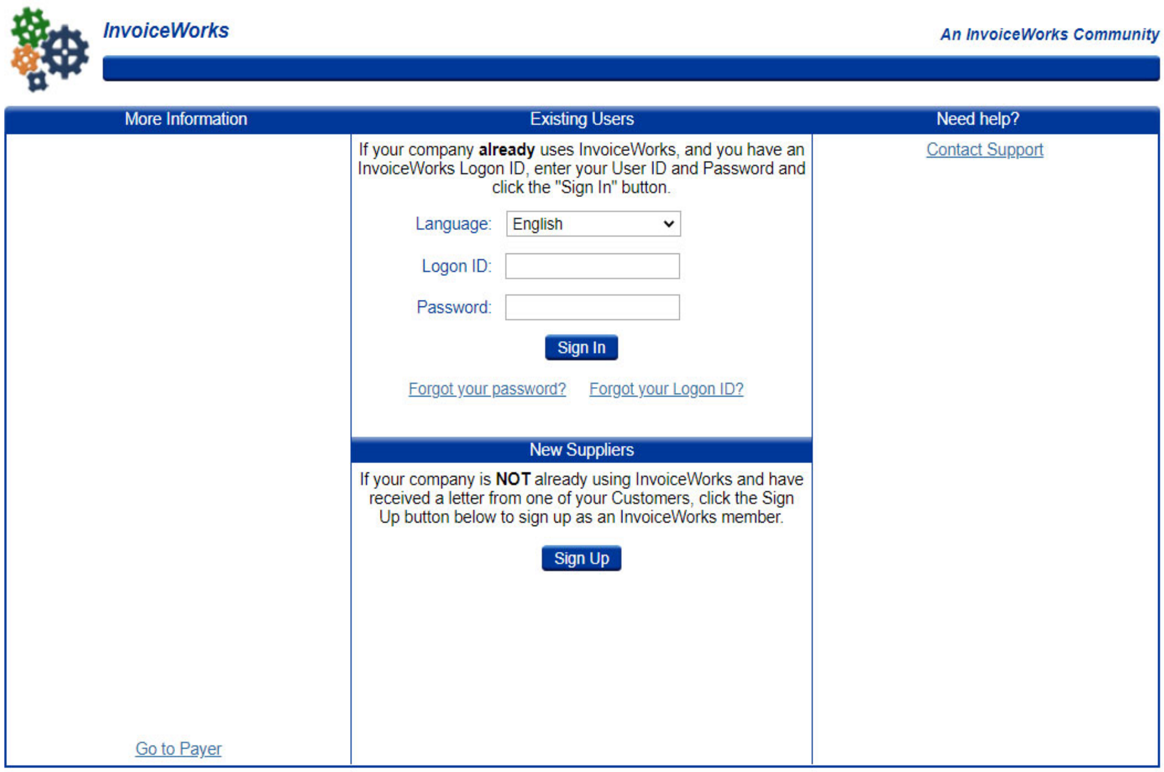
If you do not have a PO or Contract number, please reach out to the BWL contact who placed the order being invoiced. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.

1. How to Access the onPhase Supplier Website and Sign In

Using your internet browser, go to the following address https://www.ipayables.net/new. The onPhase™ Welcome screen will open. Select Sign In To Supplier on the left side of the screen.



The Sign In screen will open. Under Existing Users, enter the onPhase User ID and Password that you chose when you signed up and click on the ‘Sign In’ button.

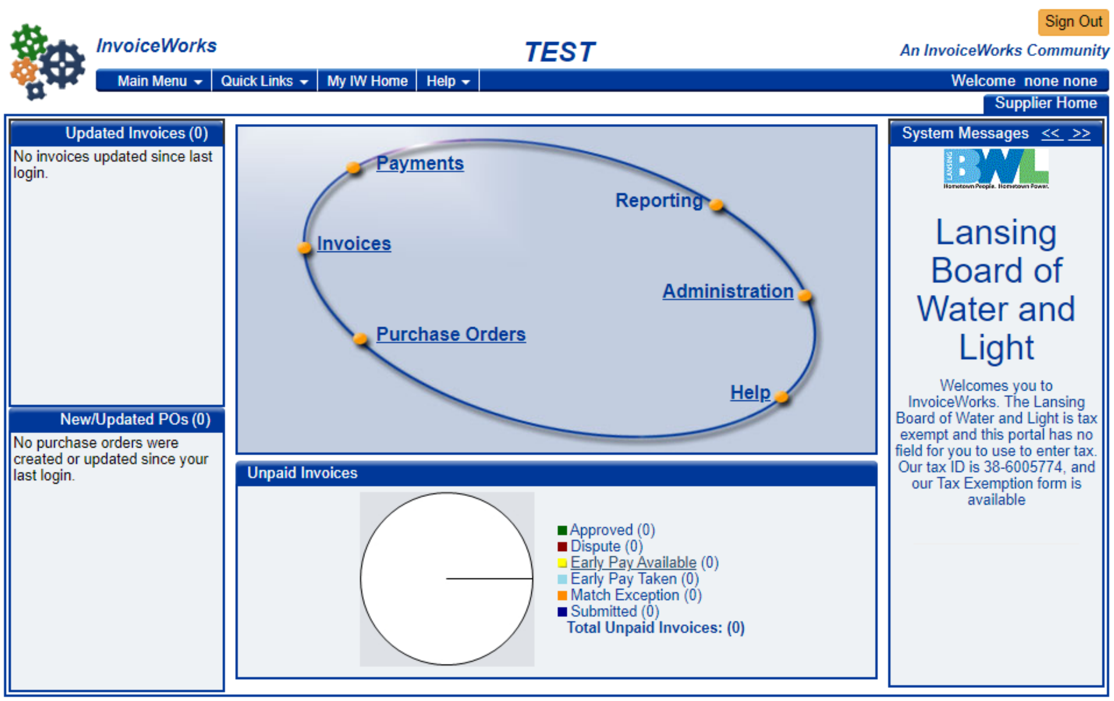


Once you have signed into onPhase Supplier, you will be directed to your home page on onPhase Supplier.

- The left-hand column lists invoices with updated statuses since you last signed into onPhase and draft invoices that have not been submitted.
- The right-hand column contains messages and news about onPhase.

There are two ways to access the different features of onPhase:

- Main Menu: By clicking on the Main Menu item at the top of the screen, a list of features available to you in onPhase will be listed. Simply click on the desired activity.
- Graphical Features: Click on a feature in the circular graphic in the middle of the screen and a list of activities will appear. Simply click on the desired activity.



2. Creating PO Based Invoices

This section applies to invoices when you have a valid BWL Purchase Order (PO) number. A BWL PO number is a 10-digit number that begins with “45”. If you have been given a 10-digit number that begins with “46”, please skip ahead to section 3.

If you know the PO number for your invoice and do not want to view the PO line-item details, you may skip to section 2.2. We strongly encourage you to view the PO line-item details first, however, by using section 2.1 below.

If a PO number has been created for this invoice, but you’re unsure what the PO number is, start at section 2.1 below. Likewise, if you know the PO number and would like to view the PO line-item details, start at section 2.1 below.

If you do not have a PO number or are unsure if one has been created for this invoice, please reach out to the BWL contact who placed the order being invoiced. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.

2.1 PO Search for Invoice Entry

Navigate to “Purchase Order Search” by using the “Main Menu” dropdown at the top of the screen or by using the “Purchase Order” visual on the home page.

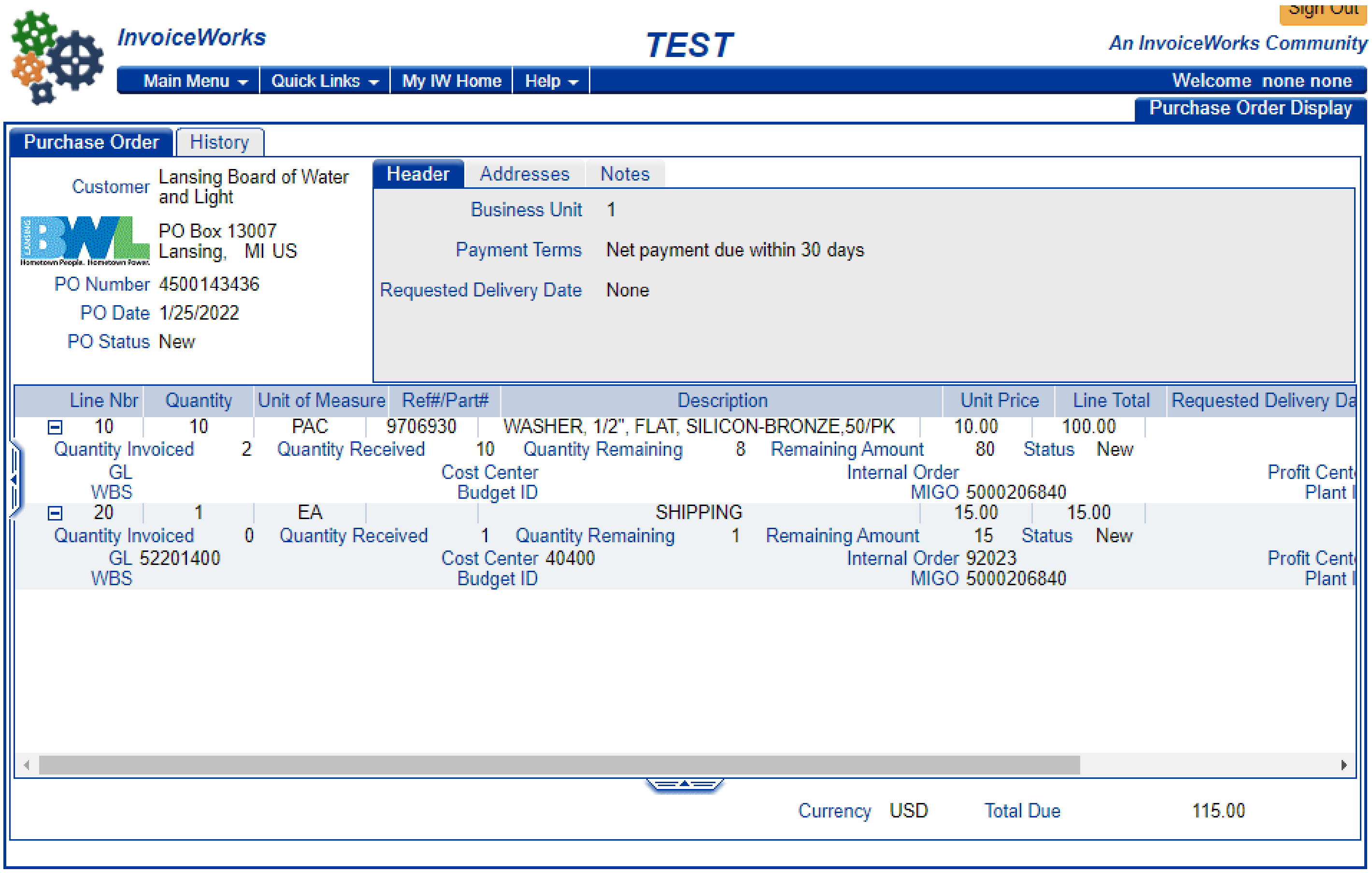
You will then be presented with the “Purchase Order Search” tab as seen below:

Use this search tab to find the PO. If you leave the search criteria blank and click “Search”, it will return all

POs associated with your vendor account.

**Please note: Although there are different status options to select from the dropdown, all POs are currently listed as “New”. This will be addressed with a system update in the future, and this documentation will be updated accordingly.

Click on the hyperlinked “PO Nbr” to open a PO. The PO screen will open as shown below:



Use the PO information to determine if this is the appropriate PO for your invoice. Additionally, click on the “Notes” tab at the top to review any notes made by your BWL contact pertaining to this PO.

If you are unable to determine the correct PO or have other questions related to the PO, please reach out to your BWL contact who placed the order being invoiced. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.

Please take note of the PO attributes listed below while viewing the PO. They will be important when entering and submitting an invoice.

- Line Nbr – This field represents different lines set up within the PO. Different lines are typically set up for different categories of goods and/or services that are being provided.
- Quantity – This field represents the quantity of goods or services for the PO line.

- Unit Price – This field represents the unit price of the goods or services for the PO line.
- Line Total – This field represents the total dollar amount associated with the PO line. It is the product of the Quantity multiplied by the Unit Price.

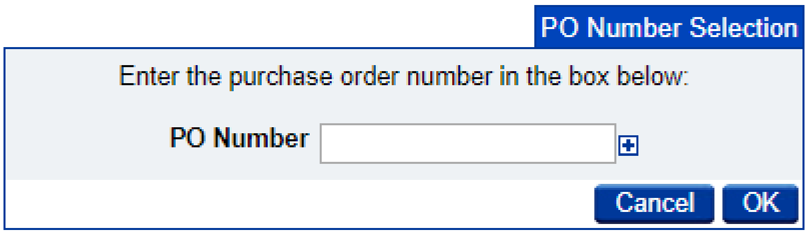
**Please note: Due to system limitations, in some cases the unit price may be set to 1 and the quantity may be set to the total dollar amount associated with the PO line. This most commonly occurs when a PO line is set up to be invoiced against multiple times (a PO line set up for multiple, progress-based invoices is the most common example).

Once you have reviewed the PO and are ready to enter an invoice against the PO, click on the slider icon  on the left side of the screen. Then click “Create PO Invoice”.

Proceed to section 2.3 to continue.

2.2 PO Invoice Entry Without PO Search

If you know the PO number for your invoice and do not want to view the PO details before entering the invoice, navigate to "Create a PO Invoice" by using the "Main Menu" dropdown at the top of the screen or by using the "Invoices" visual on the home page. You will then be asked to enter your PO number as seen below:

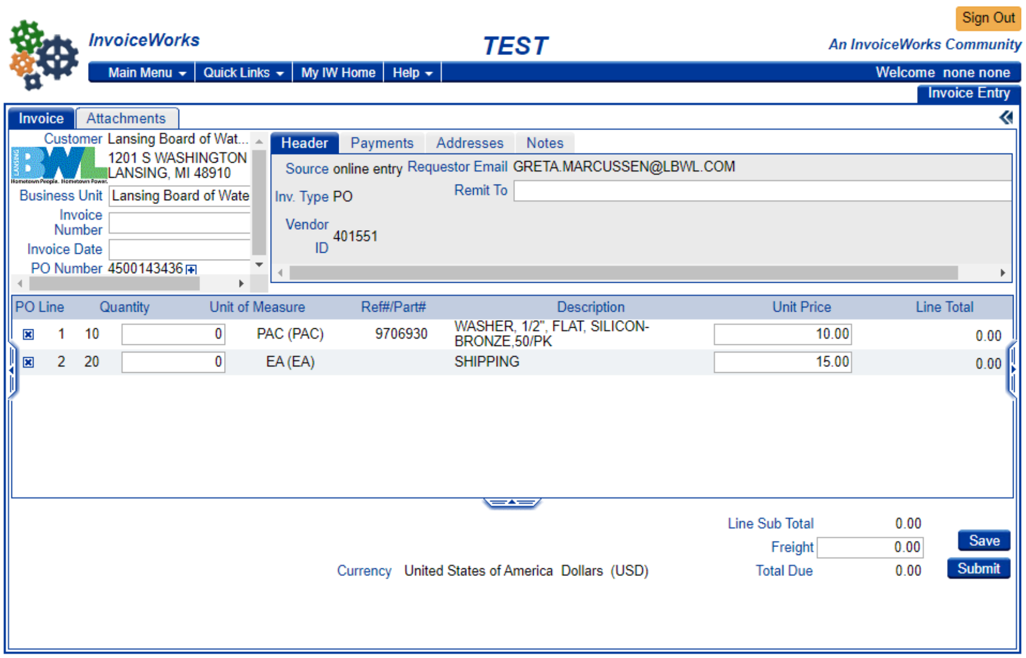


Clicking the "+" rather than entering PO number will allow you to select the PO from a list.

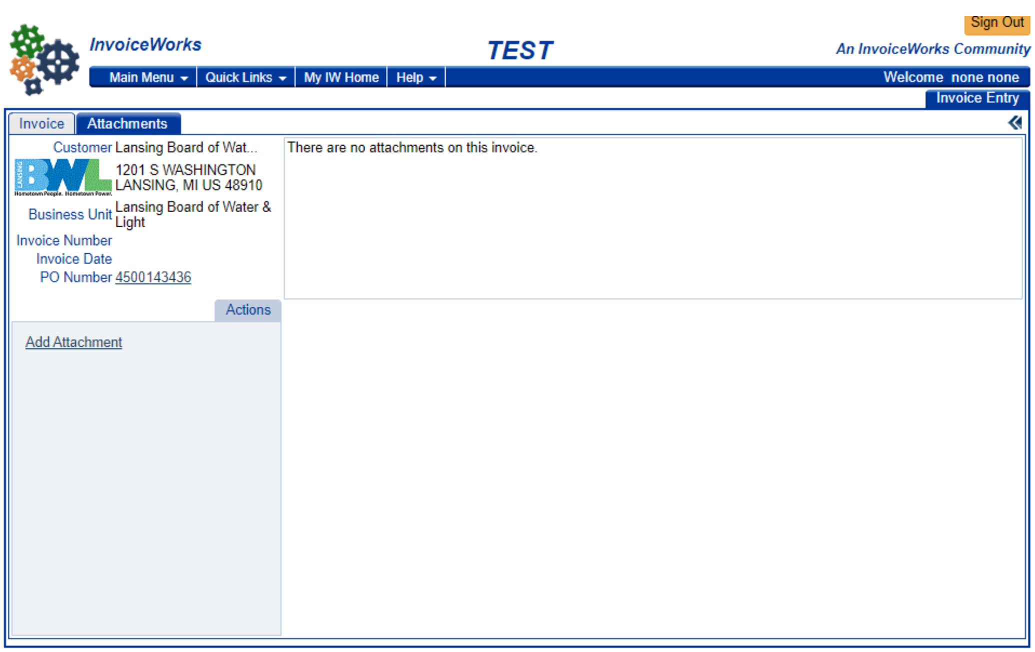
Click "OK" and proceed to section 2.3 to continue.

2.3 Entering a PO Invoice

Once you have selected the PO to enter an invoice against, you will see the invoice entry screen as shown below:



To begin, click the "Attachments" tab in the top left of the invoice entry screen. An attachment is required to submit an invoice. This will take you to the attachments screen as seen below:



Click “Add Attachment” on the left side of the screen. An attachment window will appear for you to attach a PDF copy of the invoice. Be sure to also fill in the “Description” field. You will receive confirmation if the attachment is loaded successfully. Once you’ve completed this step, click on the “Invoice” tab in the top left to return to the invoice entry screen.

Enter the “Invoice Number” and “Invoice Date” in the top left section.

If the “Remit To” box is blank in the top right section, this means we have multiple remit to addresses on file for your vendor account. Click in the box to select the correct remit to address.

In the middle section, input the Quantity being invoiced for each applicable PO line. The Line Total field will update accordingly. If a PO line is present that you are not invoicing against with this invoice, click the “x” on the left side of the PO line to remove the line from the invoice.

If there is no PO line specifically set up for shipping costs, but the invoice consists of shipping costs, enter the amount in the “Freight” field in the bottom right.

Once all the fields have been entered, click on the slider icon  on the left side of the screen to access invoice actions.

Click on the “Check Edits” action on the Slider screen to verify that all required items on the invoice are correct. When you click on the “Check Edits” action and certain required fields are blank or incorrect, the invoice will not pass edits and the fields that are missing or incorrect will be highlighted.

At the same time the “Edit Errors” slider will appear on the right side of the screen and provide details about each of the fields that did not pass edits. **You will not be able to submit your invoice for payment until the invoice has passed all required edits.**

Once the invoice fields that have issues are corrected, click the “Recheck” 

button. If all edit errors have been corrected, a message will appear on the screen that indicates the invoice passes edits.

You will also notice a few additional tabs at the top of the invoice entry screen. You will likely not need to use these tabs, but descriptions of each are below:

- The “Payments” tab shows the terms that were agreed to in the PO, and the due date is calculated by applying those terms to the invoice date. If you try to adjust the terms, your invoice will not pass edits.
- The “Addresses” tab lists the addresses associated with the invoice. These fields are not editable.
- The “Notes” tab allows the vendor to input notes that will be transmitted back to BWL with the invoice.

Once an invoice is complete and passes edits, you can submit the invoice by doing one of the following:

- Clicking on the ‘Submit’ button  in the lower right corner of the invoice entry screen
- Clicking on the ‘Submit Invoice’ action on the Slider screen

The invoice will now be routed to BWL for approval and payment. A message will appear on the screen indicating that your invoice was successfully submitted.

2.4 Save an Invoice as a Draft

If you are not ready to submit the invoice you can save the invoice as a draft by clicking on the “Save Draft” action on the slider screen or you can click on the save button  in the lower right corner of the screen. A message will appear on the screen that indicates that the invoice has been saved as a draft.

To view your saved, draft invoices navigate to “Saved Invoices” by using the “Main Menu” dropdown at the top of the screen or by using the “Invoices” visual on the home page. You will be taken to the Draft Invoice Screen.

Draft invoices can be sorted by clicking on the title of any of the columns. For example, clicking on “Invoice Number” or “Total Due” will sort all draft invoices by that column.

Draft invoices that have passed edits will have a “Pass” in the “Pass Edits” column. Draft invoices that have not passed edits will have a “Fail” in the “Pass Edits” column.

To make changes to draft Invoices or to complete and submit the draft Invoices, click on the Invoice Number link for the invoice.

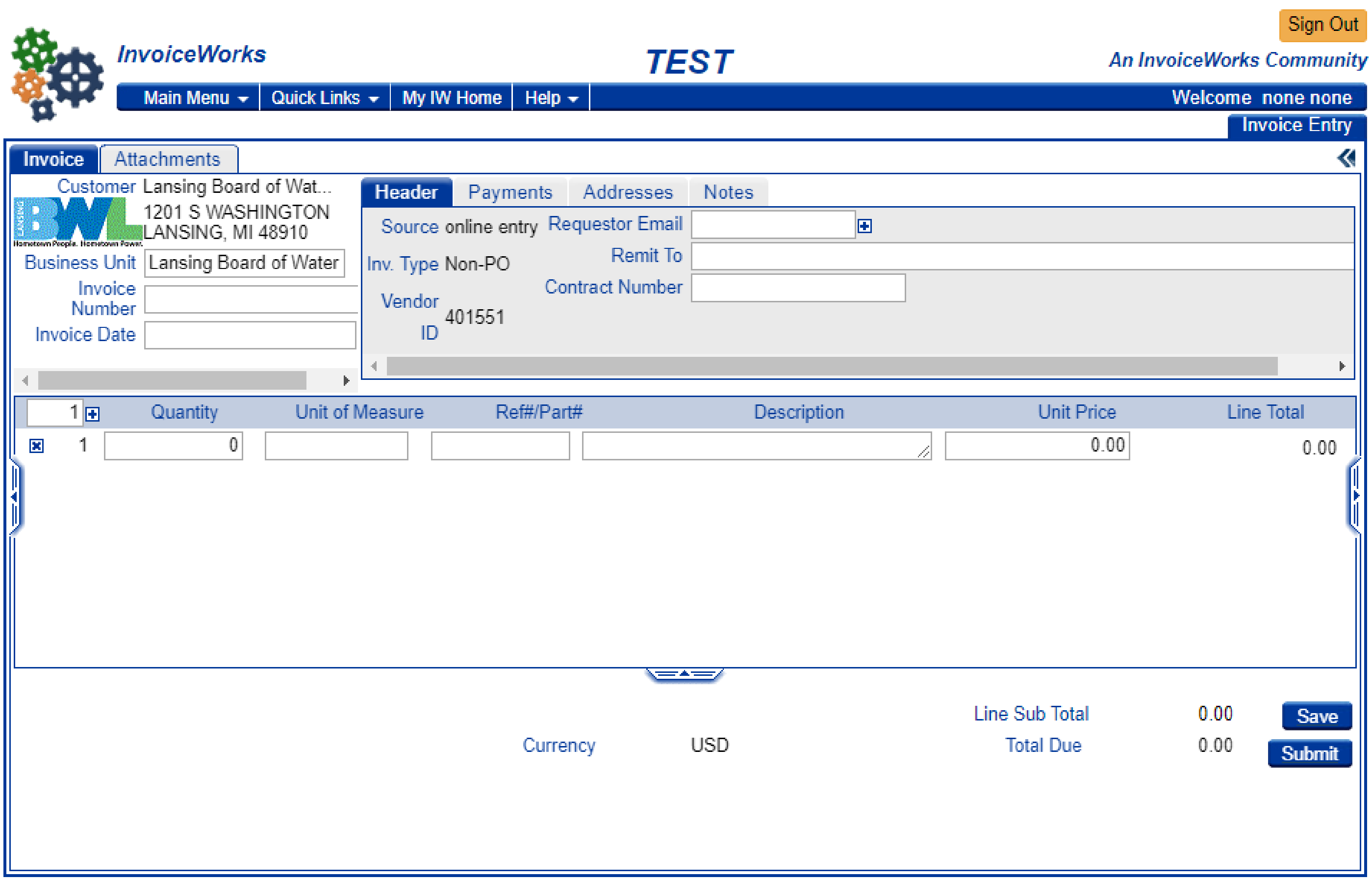
3. Creating Non-PO (Contract) Based Invoices

This section applies to invoices when you have a valid BWL contract number. A BWL contract number is a 10-digit number that begins with “46”. If you have been given a 10-digit number that begins with “45”, please refer back to section 2.

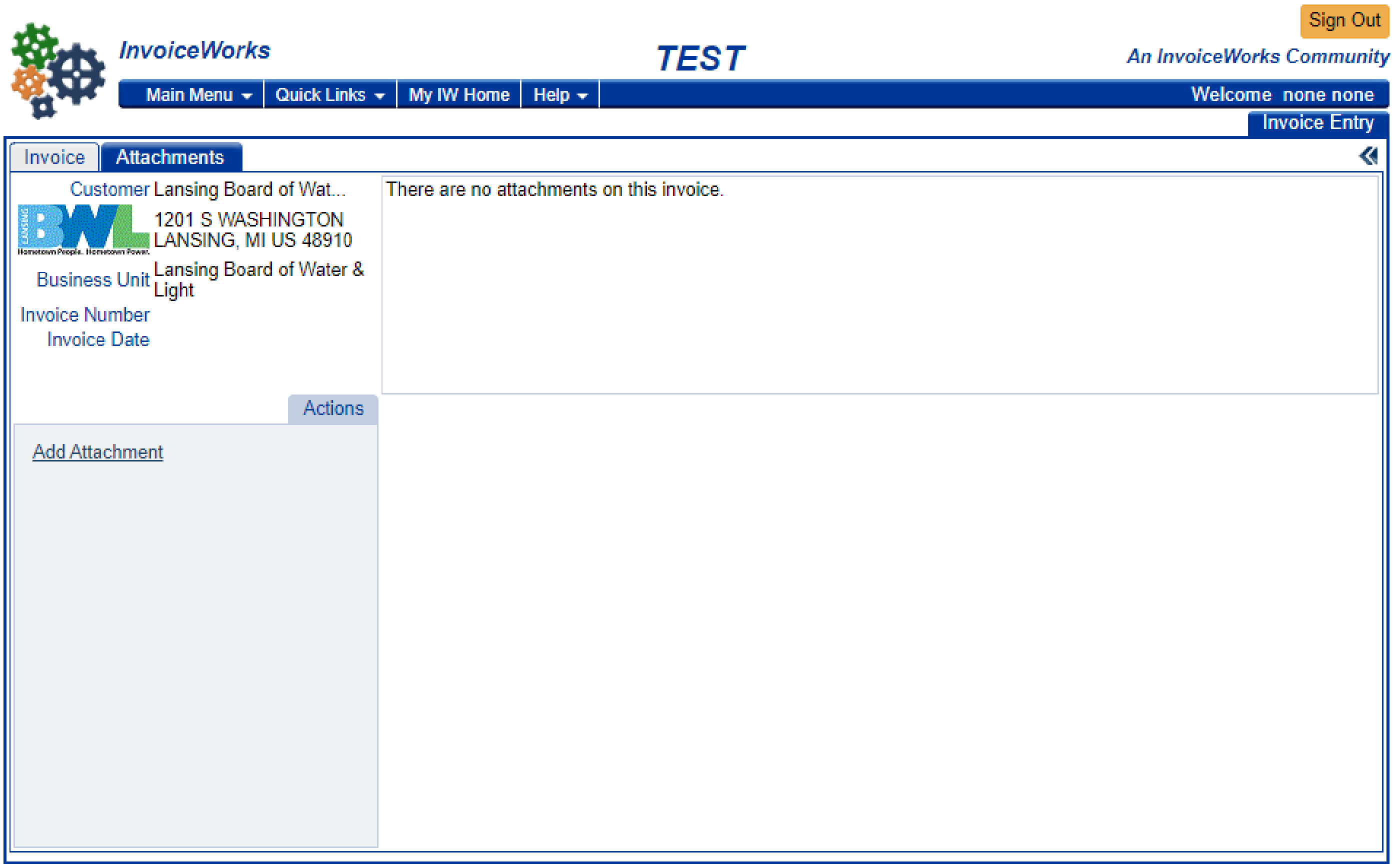
If you do not have a contract number or are unsure if one has been created, please reach out to the BWL contact who placed the order being invoiced. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.

3.1 Entering a Non-PO Invoice

Navigate to “Create a Non-PO Invoice” by using the “Main Menu” dropdown at the top of the screen or by using the “Invoices” visual on the home page. You will be taken to the Non-PO invoice entry screen as shown below:



To begin, click the “Attachments” tab in the top left of the invoice entry screen. An attachment is required to submit an invoice. This will take you to the attachments screen as seen below:



Click “Add Attachment” on the left side of the screen. An attachment window will appear for you to attach a PDF copy of the invoice. Be sure to also fill in the “Description” field. You will receive confirmation if the attachment is loaded successfully. Once you’ve completed this step, click on the “Invoice” tab in the top left to return to the invoice entry screen.

Enter the “Invoice Number” and “Invoice Date” in the top left section.

The “Requestor Email” field must be populated with the email of your BWL invoicing contact for this invoice. Unless provided otherwise, this should be the BWL contact who placed the order being invoiced. You have two options for populating this field. You can directly type the BWL contact’s email address, or you can click the “+” next to the field to search by BWL employee names.

If the “Remit To” box is blank in the top right section, this means we have multiple remit to addresses on file for your vendor account. Click in the box to select the correct remit to address.

Enter the BWL contract number you were provided in the “Contract Number” field.

In the middle section, input the appropriate invoice lines according to your PDF invoice. If your PDF invoice contains 3 separate lines, you will enter 3 separate invoice lines in this section. By default, 1 line is present. To add lines, click the "+" icon to the left of the "Quantity" header. Enter the appropriate "Quantity", "Unit of Measure", "Description", and "Unit Price" for each invoice line. The "Ref#/Part#" field is optional and not required, but you may use it for additional detail when necessary.

Once all the fields have been entered, click on the slider icon on the left side of the screen to access invoice actions.

Click on the "Check Edits" action on the Slider screen to verify that all required items on the invoice are correct. When you click on the "Check Edits" action and certain required fields are blank or incorrect, the invoice will not pass edits and the fields that are missing or incorrect will be highlighted.

At the same time the "Edit Errors" slider will appear on the right side of the screen and provide details about each of the fields that did not pass edits. **You will not be able to submit your invoice for payment until the invoice has passed all required edits.**

Once the invoice fields that have issues are corrected, click the "Recheck" button. If all edit errors have been corrected, a message will appear on the screen that indicates the invoice passes edits.

You will also notice a few additional tabs at the top of the invoice entry screen. You will likely not need to use these tabs, but descriptions of each are below:

- The "Payments" tab shows the terms that were agreed to in the PO, and the due date is calculated by applying those terms to the invoice date. If you try to adjust the terms, your invoice will not pass edits.
- The "Addresses" tab lists the addresses associated with the invoice. These fields are not editable.
- The "Notes" tab allows the vendor to input notes that will be transmitted back to BWL with the invoice.

Once an invoice is complete and passes edits, you can submit the invoice by doing one of the following:

- Clicking on the 'Submit' button in the lower right corner of the invoice entry screen
- Clicking on the 'Submit Invoice' action on the Slider screen

The invoice will now be routed to BWL for approval and payment. A message will appear on the screen indicating that your invoice was successfully submitted.

3.2 Save an Invoice as a Draft

If you are not ready to submit the invoice you can save the invoice as a draft by clicking on the “Save Draft” action on the slider screen or you can click on the save button 

in the lower right corner of the screen. A message will appear on the screen that indicates that the invoice has been saved as a draft.

To view your saved, draft invoices navigate to “Saved Invoices” by using the “Main Menu” dropdown at the top of the screen or by using the “Invoices” visual on the home page. You will be taken to the Draft Invoice Screen.

Draft invoices can be sorted by clicking on the title of any of the columns. For example, clicking on “Invoice Number” or “Total Due” will sort all draft invoices by that column.

Draft invoices that have passed edits will have a “Pass” in the “Pass Edits” column. Draft invoices that have not passed edits will have a “Fail” in the “Pass Edits” column.

To make changes to draft Invoices or to complete and submit the draft Invoices, click on the Invoice Number link for the invoice.

4. Additional System Functionality

In addition to invoice entry, the onPhase vendor platform offers other useful features, such as the ability to view Purchase Orders and Invoices while tracking the progress toward payment.

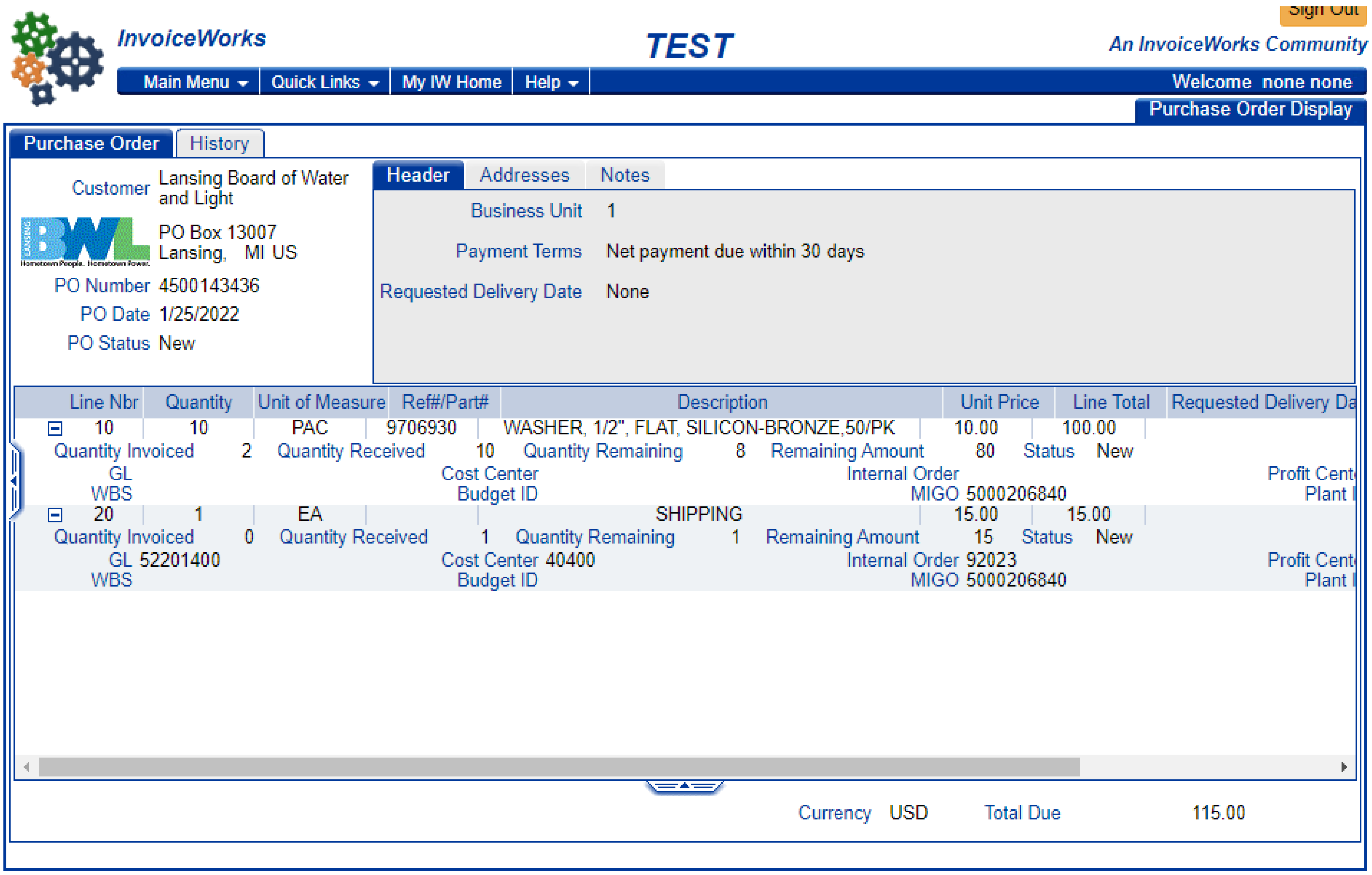
4.1 Searching for and Viewing Purchase Orders

Navigate to “Purchase Order Search” by using the “Main Menu” dropdown at the top of the screen or by using the “Purchase Order” visual on the home page.

You will then be presented with the “Purchase Order Search” tab as seen below:

Use this search tab to find the PO. If you leave the search criteria blank and click “Search”, it will return all POs associated with your vendor account.

Click on the hyperlinked “PO Nbr” to open a PO. The PO screen will open as shown below:



Use this screen to view PO information. Additionally, you can click on the “Notes” tab at the top to review any notes made by your BWL contact pertaining to this PO.

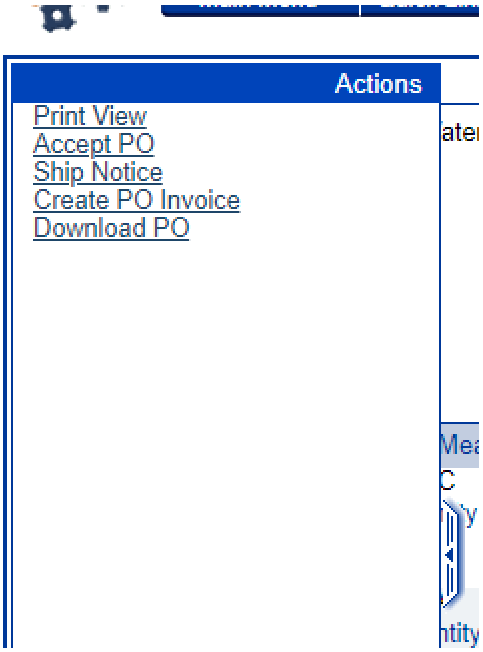
If you are unable to find the PO you are searching for or have other questions related to the PO, please reach out to your BWL contact. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.

Below are some key PO attributes and explanations.

- Line Nbr – This field represents different lines set up within the PO. Different lines are typically set up for different categories of goods and/or services that are being provided.
- Quantity – This field represents the quantity of goods or services for the PO line.
- Unit Price – This field represents the unit price of the goods or services for the PO line.
- Line Total – This field represents the total dollar amount associated with the PO line. It is the product of the Quantity multiplied by the Unit Price.

**Please note: Due to system limitations, in some cases the unit price may be set to 1 and the quantity may be set to the total dollar amount associated with the PO line. This most commonly occurs when a PO line is set up to be invoiced against multiple times (a PO line set up for multiple, progress-based invoices is the most common example).

You can also click on the slider icon  on the left side of the screen to access additional PO actions as seen below:



While the “Accept PO” and “Ship Notice” options are selectable, they are currently not used in BWL’s implementation of onPhase. If they are activated for use in the future, you will be notified, and this documentation will be updated accordingly.

Selecting “Print View” generates a pop-up window that can be printed or saved as a PDF.

Selecting “Download PO” generates a text file containing the PO details.

Selecting “Create PO Invoice” will allow you to enter an invoice against this PO. Directions for this can be found in section 2.1 of this manual.

4.2 Searching for Invoices and Checking Payment Status

Once an invoice has been submitted, it is available for review. Navigate to “Invoice Search” by using the “Main Menu” dropdown at the top of the screen or by using the “Invoices” visual on the home page.

The “Invoice Search” screen will appear as shown below:

Use this search tab to find invoices. If you leave the search criteria blank and click “Search”, it will return all invoices associated with your vendor account. One or more invoices will be displayed that match your criteria with summary information about the invoice. The list of invoices can be sorted by clicking on the title of the column. Click once to sort in ascending order and again to sort in descending order. Wildcards (*) are acceptable in the “Customer Name”, “Invoice Number”, and “PO Nbr” fields.

Below is a description of the typical “Invoice Status” values you will see:

- Submitted – The invoice has been created and is preparing for transmission to BWL.
- Match Exception – The invoice has been submitted, but it is not ready to be transmitted to BWL for various reasons. When an invoice is in Match Exception status, a BWL employee has received an automated notification from the onPhase system that the invoice needs attention.
- Transmitted – The invoice has been transmitted to BWL and is in the process of being posted.
- Received – The invoice has been received and posted by BWL. It is preparing for payment.
- Paid – The invoice has been paid.
- Denied – The invoice has been denied by either the vendor or BWL. If you have questions about a denied invoice, please contact BWL Accounts Payable at 517-702-6200.

Clicking on the linked Invoice Number will generate a pop up “Invoice Display” window. This will allow you to see more invoice details.

4.3 Administrative Functions

Certain administrative functions are accessible through the portal as well. You can manage your profile by navigating to “My User Profile” using the “Main Menu” dropdown at the top of the screen or by using the “Administration” visual on the home page.

You can also add additional users within your company by navigating to “Manage Users” using the “Main Menu” dropdown at the top of the screen or by using the “Administration” visual on the home page.

5. Support Information

Questions regarding the portal and invoice entry can be addressed by either sending an email to the onPhase Support Desk at *invoiceworks.support@ipayables.com* or by calling onPhase support at 801-224-8300.

Questions regarding POs, PO lines, or other non-portal items should be directed to BWL. Please reach out to the BWL contact you worked with to provide the invoiced goods and/or services. If you do not know your BWL contact, please call BWL Accounts Payable at 517-702-6200.