Payment Gateway Training

Purpose

This work instruction guides users on navigating and using the Vendor Payment Gateway. This training covers the message centre, service entry sheets, creating invoices and managing invoices.

Audience

All Payment Gateway Users

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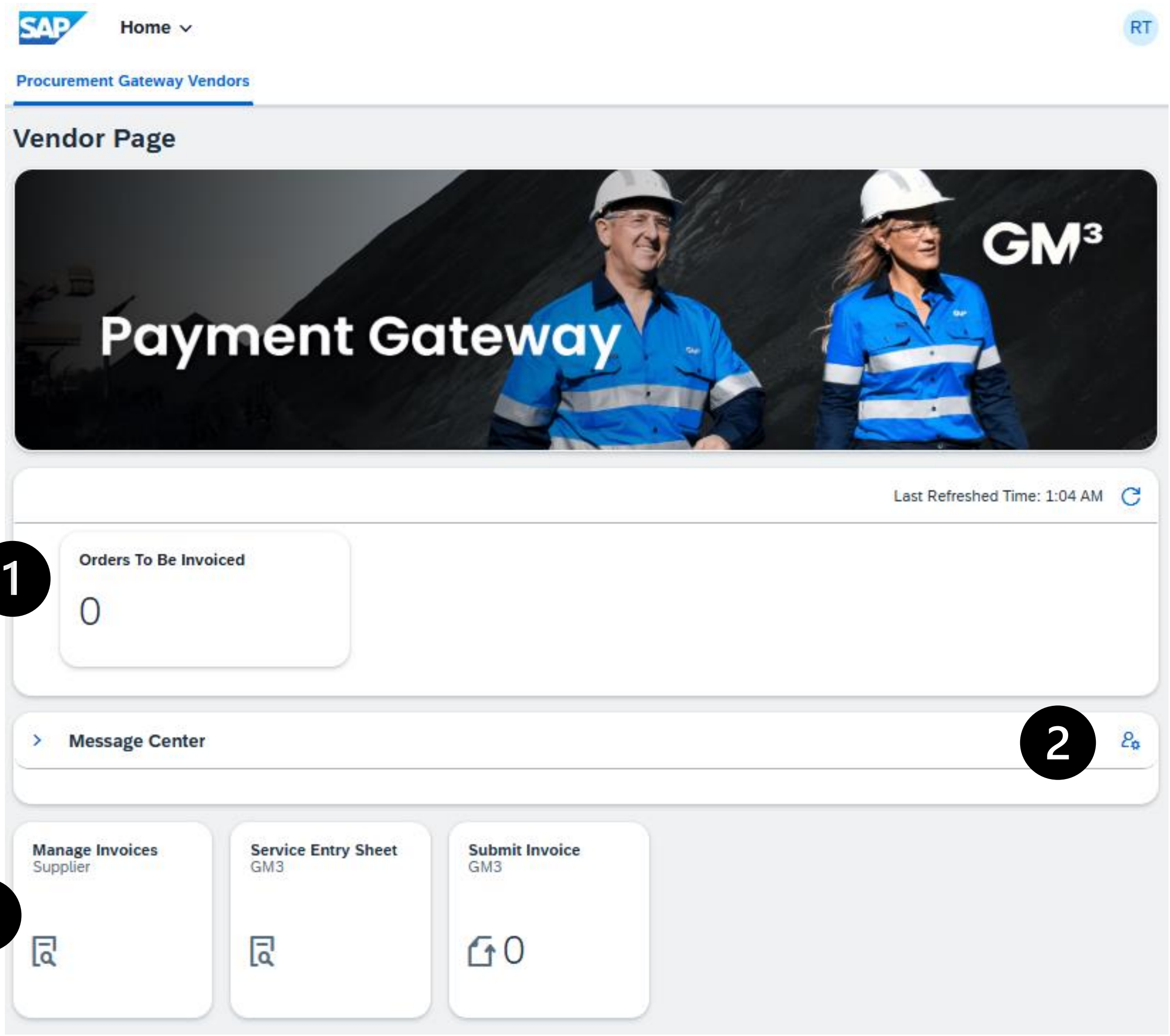
Contents

Payment Gateway Training

1. Home Page

Step	Instruction	Screenshot
1	**Action Centre** • Dynamic card that displays the number Purchase Orders that are ready to be invoiced. • Click the link to navigate to the Submit Invoice app.	
2	**Message Centre** • Click the User Settings button to subscribe to home page and email notifications.	
3	**Application Tiles** • Launch apps for Manage Invoices, Service Entry Sheets, and Submit Invoice • Submit Invoice is a dynamic tile showing the number of line items ready to invoice.	



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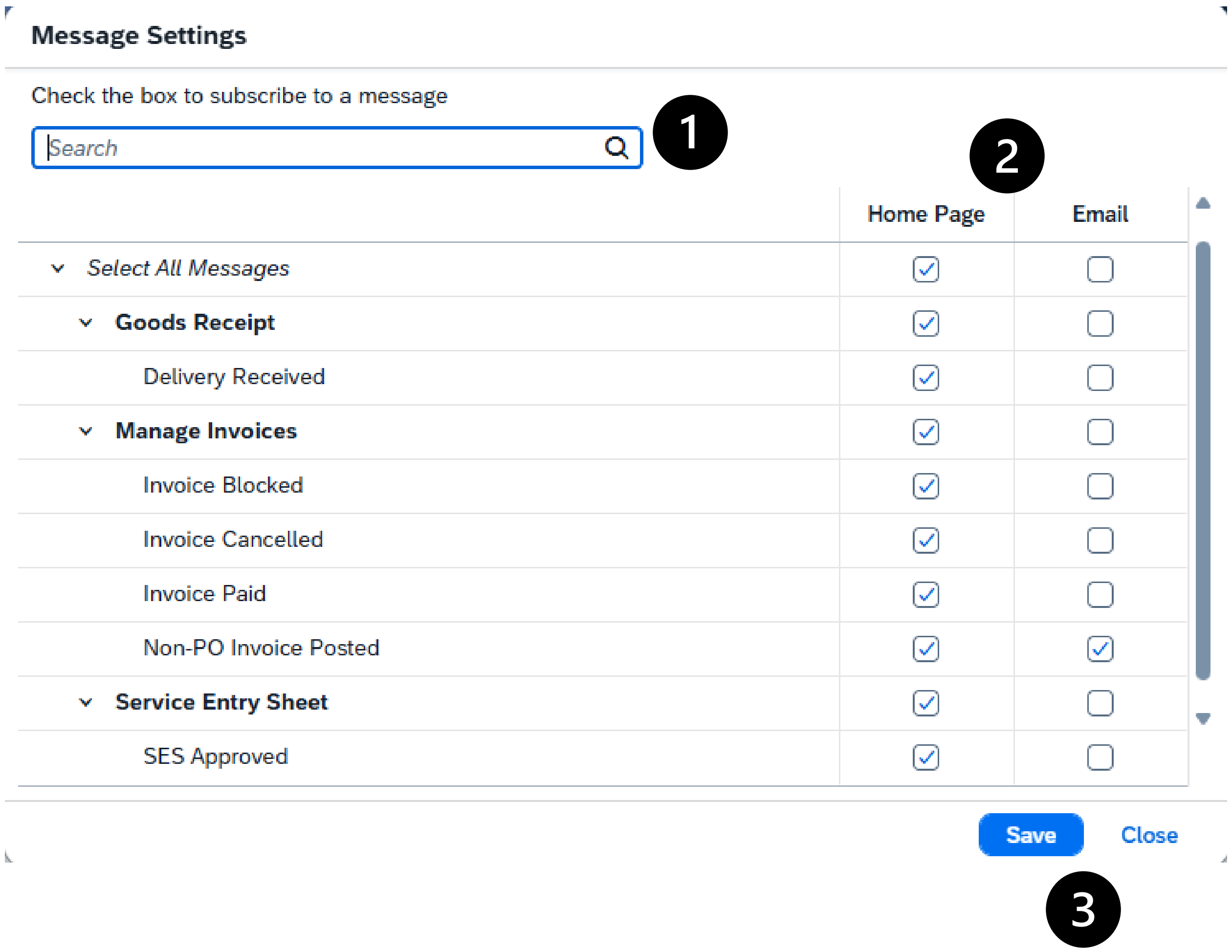
2. User Settings

Step	Instruction	Screenshot
1	**Filter to find messages** • Notifications are available for events associated with the Payment Gateway processes.	
2	**Subscribe to notification messages** • Choose to receive messages on the Home Page, via Email, or both.	
3	**Action buttons** • Save and close. • Close without saving.	

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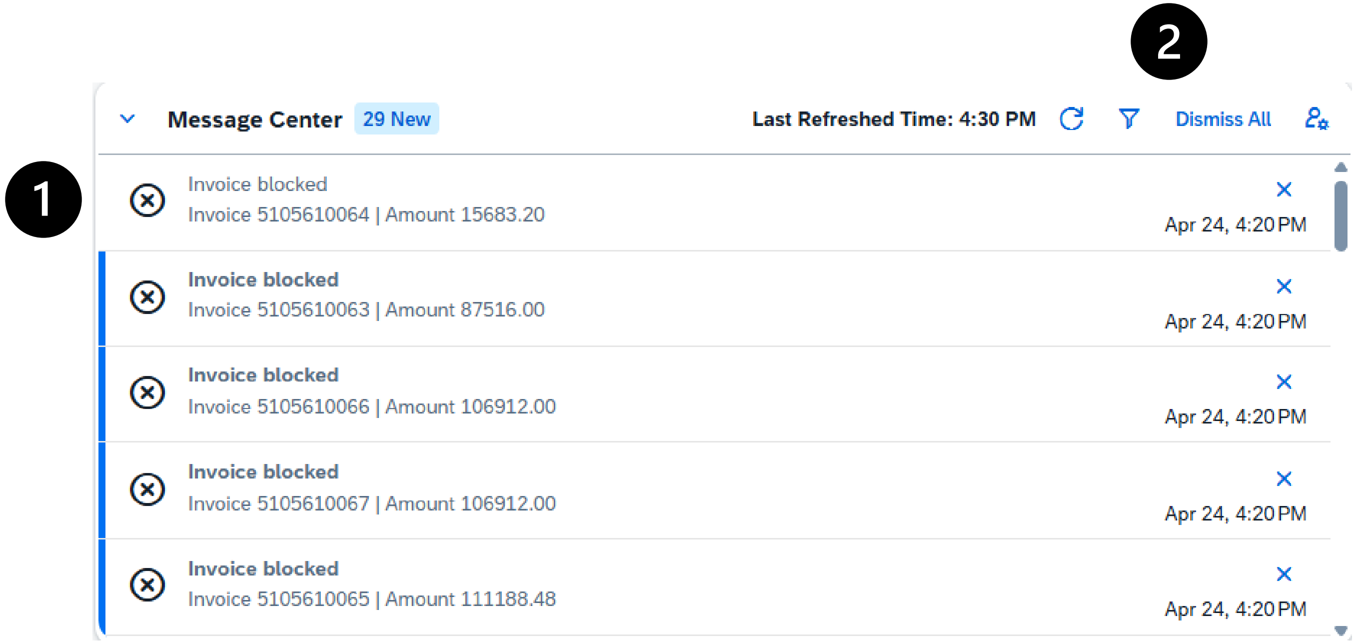
3. Notifications

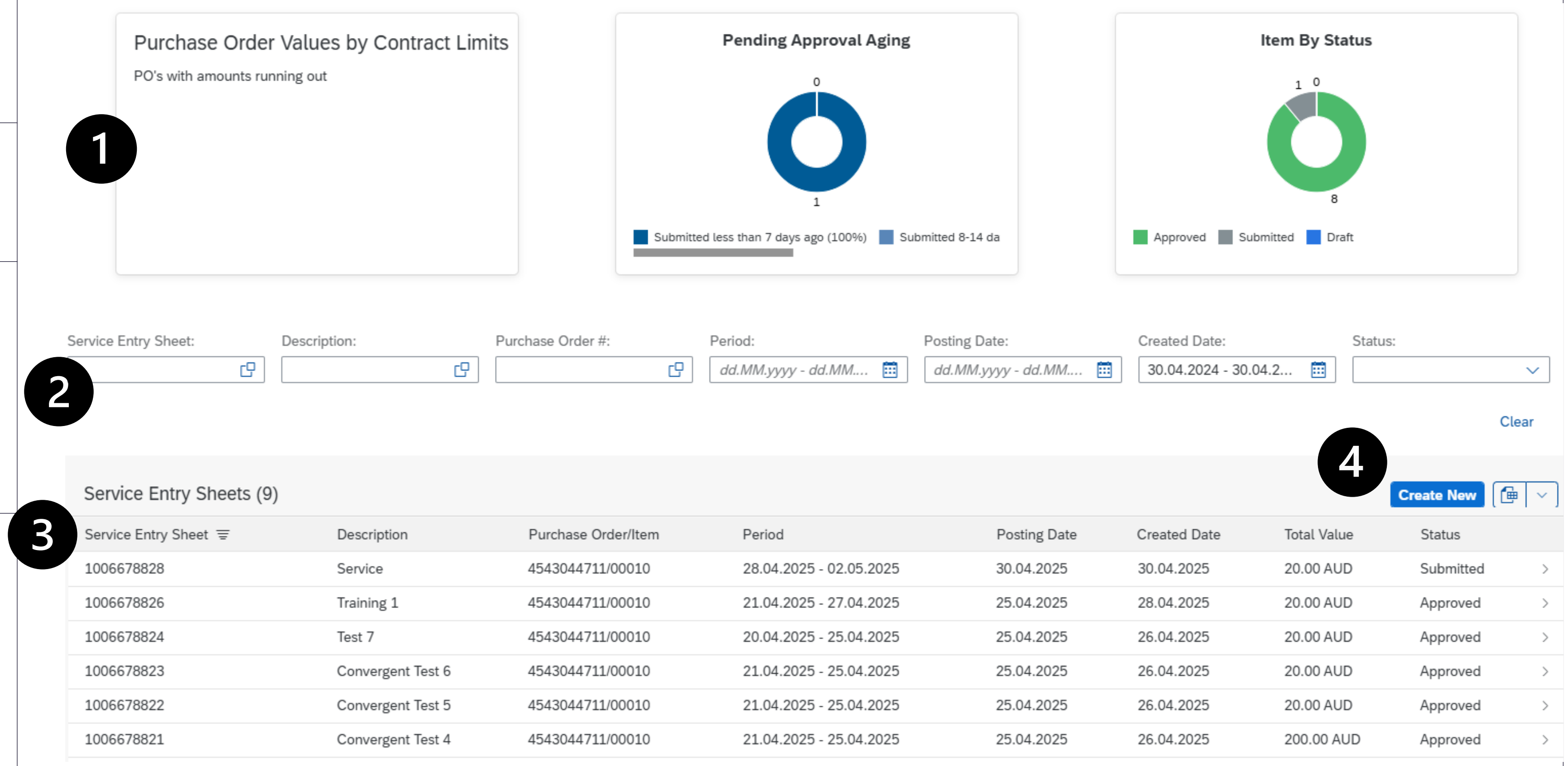
Step	Instruction	Screenshot
1	**List of subscribed messages** • Blue bar indicates an unread message. • Click a message to link to the associated app. • Dismiss messages by clicking the X on the right.	
2	**Action buttons** • Refresh the messages table. • Filter message list. • Dismiss all messages. • Open the user settings.	

Payment Gateway Training

4. Service Entry Sheets – Landing Page

Step	Instruction
1	**Summary charts reflecting current filter selection criteria**
2	**Filter options for modifying the list of existing Service Entry Sheets**
3	**List table of existing Service Entry Sheets showing header-level information** • Click a line item to view the SES detail screen
4	**Create a new Service Entry Sheet**

Screenshot



Service Entry Sheet	Description	Purchase Order/Item	Period	Posting Date	Created Date	Total Value	Status
1006678828	Service	4543044711/00010	28.04.2025 - 02.05.2025	30.04.2025	30.04.2025	20.00 AUD	Submitted
1006678826	Training 1	4543044711/00010	21.04.2025 - 27.04.2025	25.04.2025	28.04.2025	20.00 AUD	Approved
1006678824	Test 7	4543044711/00010	20.04.2025 - 25.04.2025	25.04.2025	26.04.2025	20.00 AUD	Approved
1006678823	Convergent Test 6	4543044711/00010	21.04.2025 - 25.04.2025	25.04.2025	26.04.2025	20.00 AUD	Approved
1006678822	Convergent Test 5	4543044711/00010	21.04.2025 - 25.04.2025	25.04.2025	26.04.2025	20.00 AUD	Approved
1006678821	Convergent Test 4	4543044711/00010	21.04.2025 - 25.04.2025	25.04.2025	26.04.2025	200.00 AUD	Approved

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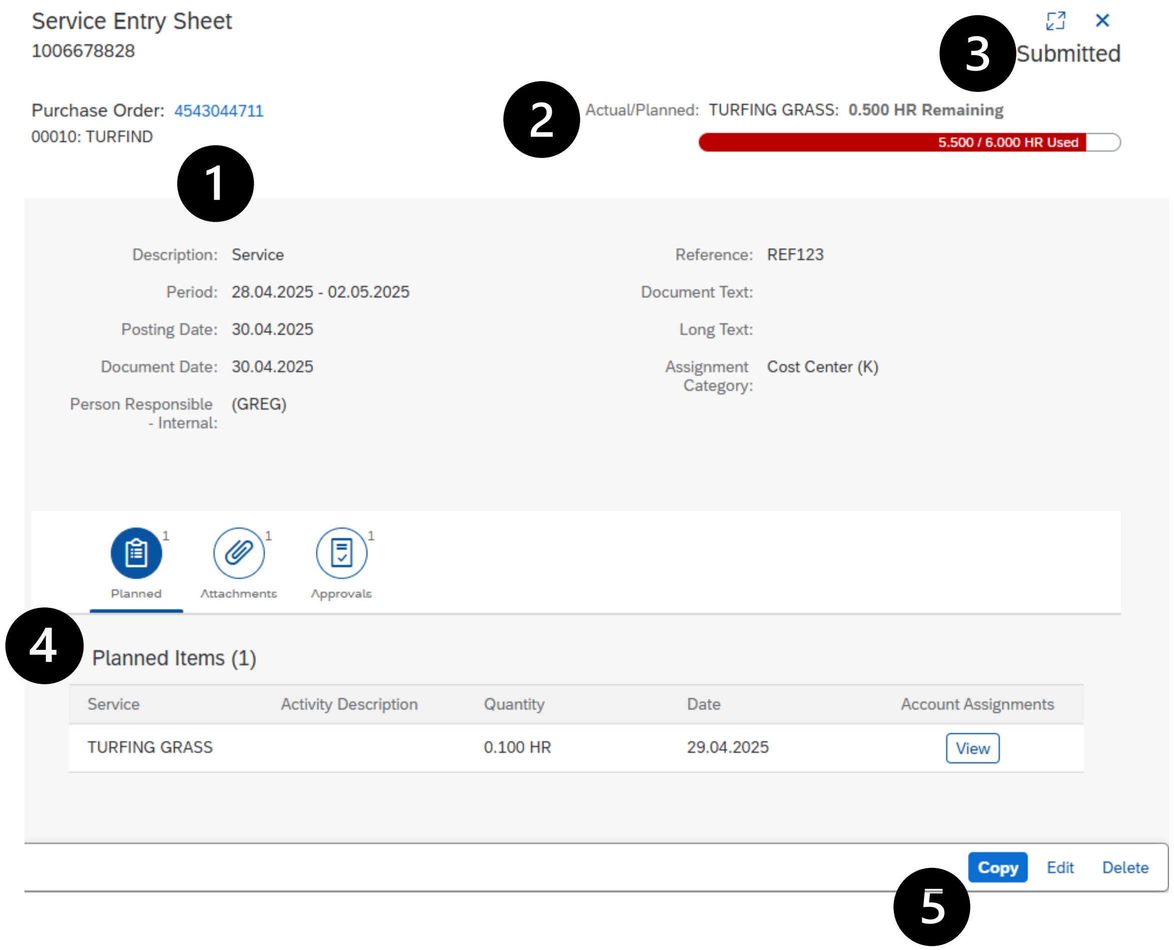
5. Service Entry Sheets – Detail Page

Step	Instruction	Screenshot
1	**Header level information**	
2	**Progress bar of available services on the PO line**	
3	**SES status**	
4	**Detail of selected tab** • Planned, Unplanned, or Contract depending on PO line setup • Attachments • Approval process flow • Create a new Service Entry Sheet	
5	**Action buttons** • Copy the existing document to create a new SES • Edit the current SES (*if in an editable state) • Delete the current SES (*if in an editable state)	



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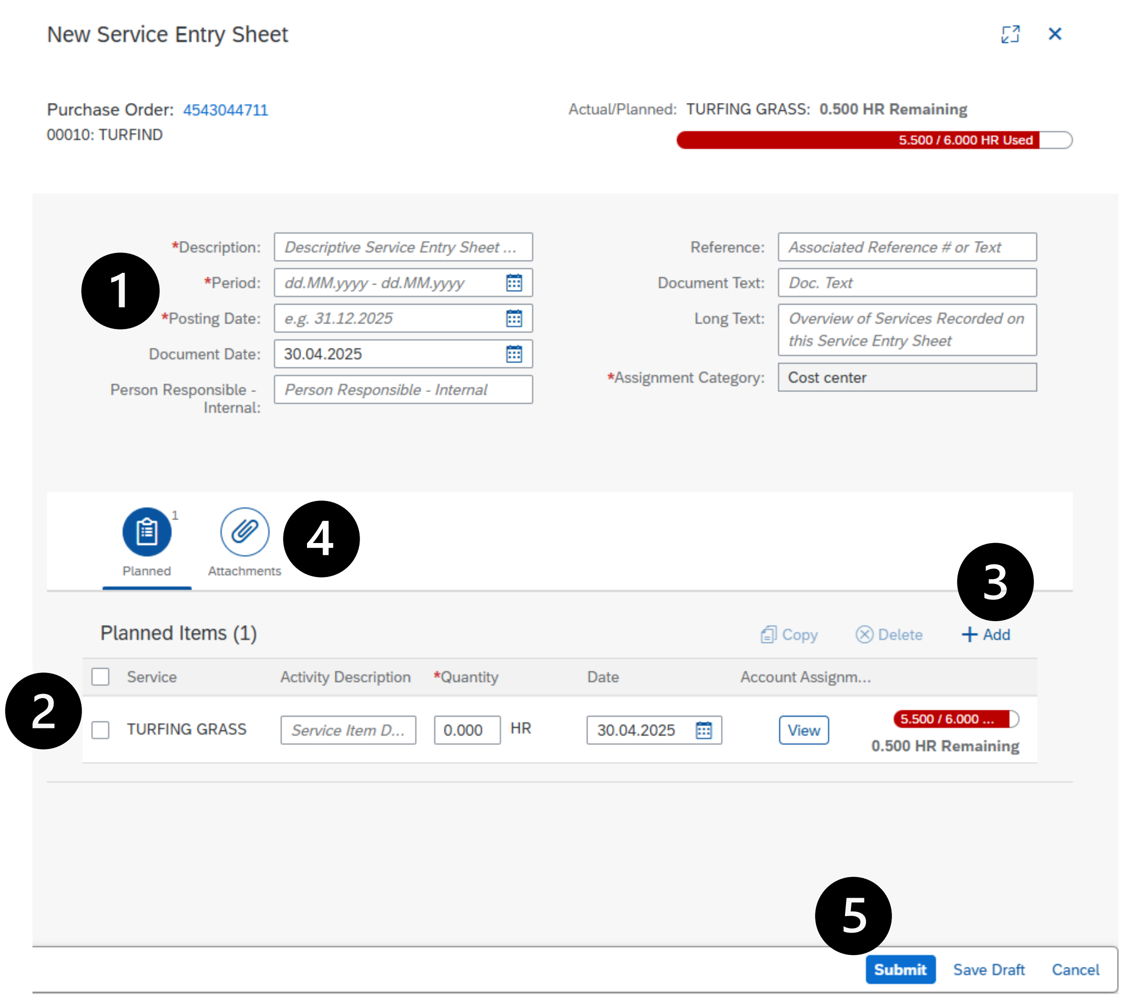
6. Service Entry Sheets – Create/Edit Page

Step	Instruction	Screenshot
1	**Header level fields** • Mandatory fields are marked with a red *	
2	**Service line details**	
3	**Add new service lines**	
4	**Attachments** • At least one attachment is required	
5	**Action buttons** • Submit the SES for approval • Save the SES as a draft for later submission • Cancel the new SES and return to the landing page	

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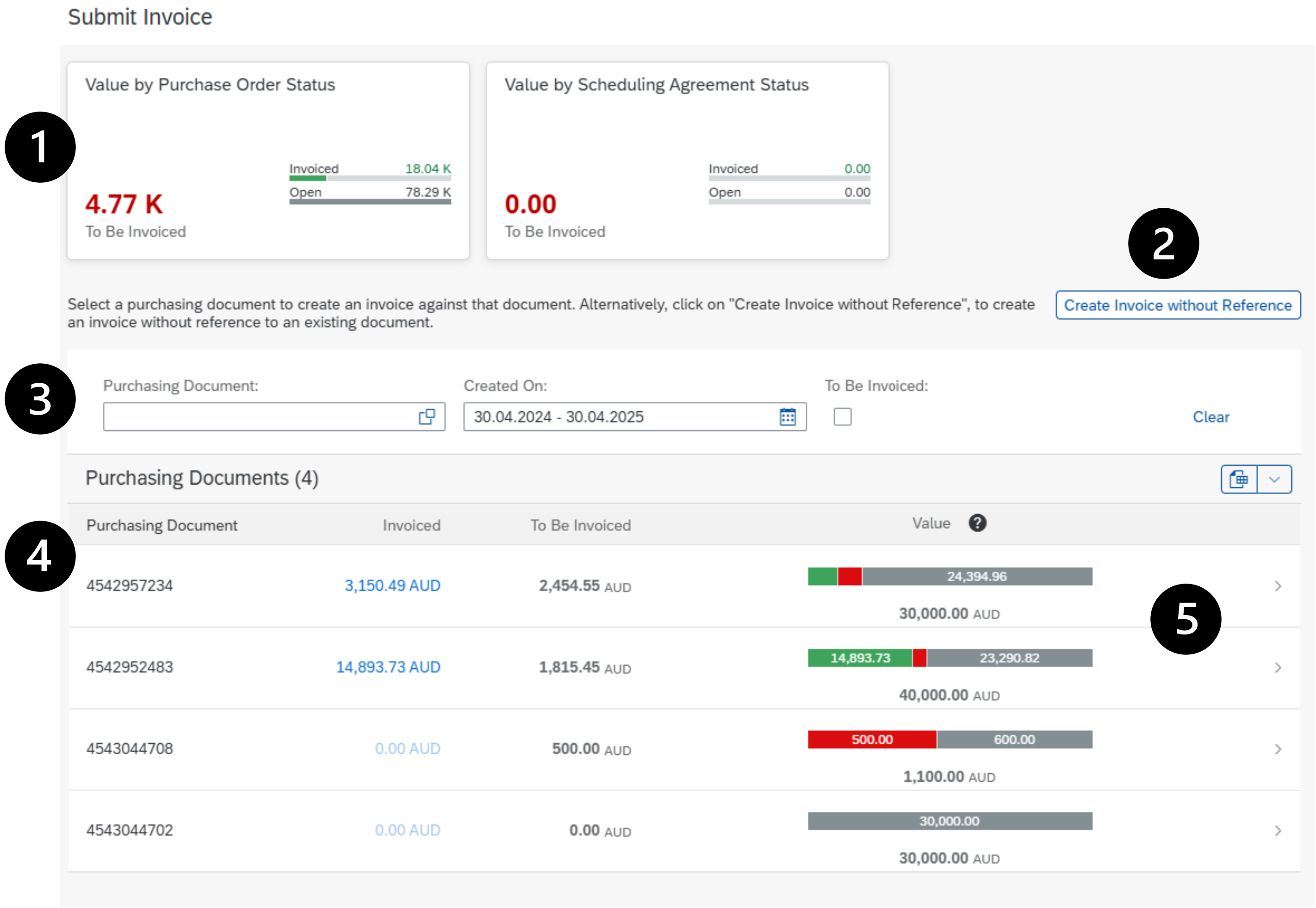
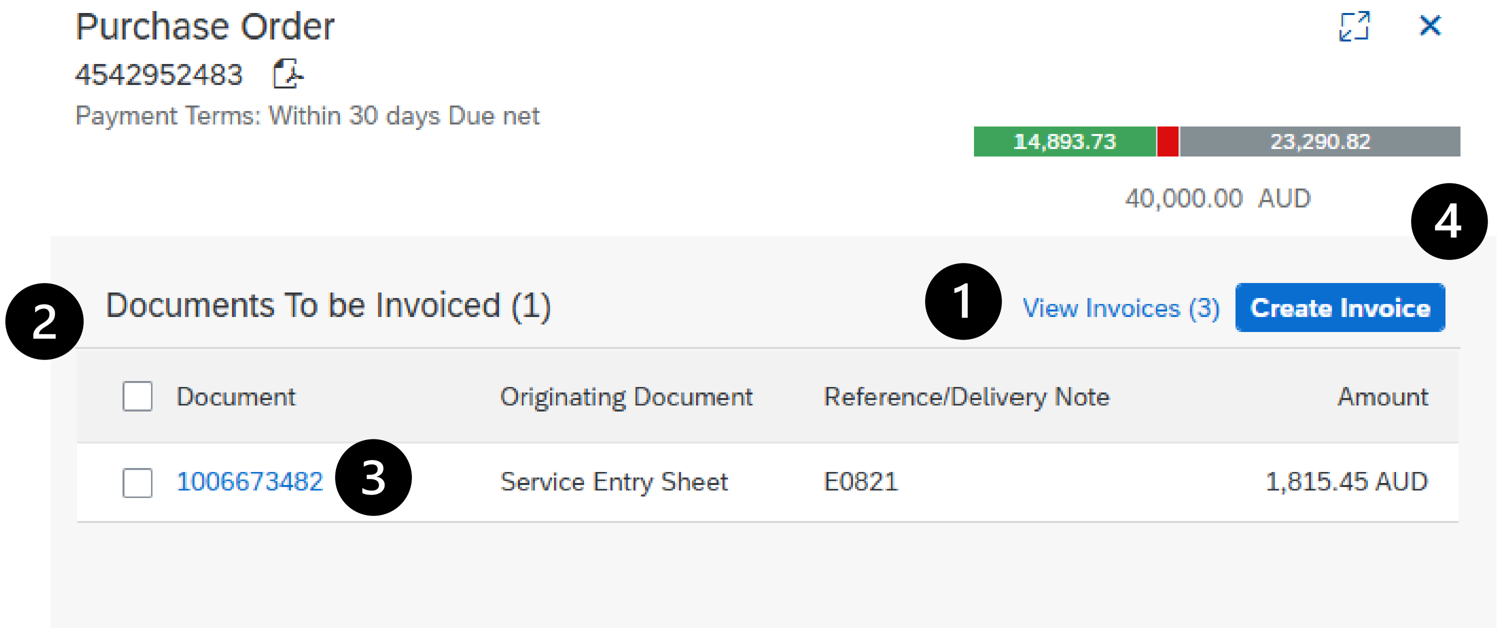
7. Submit Invoice – Landing Page

Step	Instruction	Screenshot
1	**Summary charts reflecting current filter selection criteria**	
2	**Create non-PO invoice**	
3	**Filter options for modifying the list of available purchasing documents**	
4	**List of available purchasing documents showing** • Amount already invoiced • Amount available to be invoiced • Amount still awaiting receipt	
5	**Select a line with an amount to be invoiced to open the detail page**	

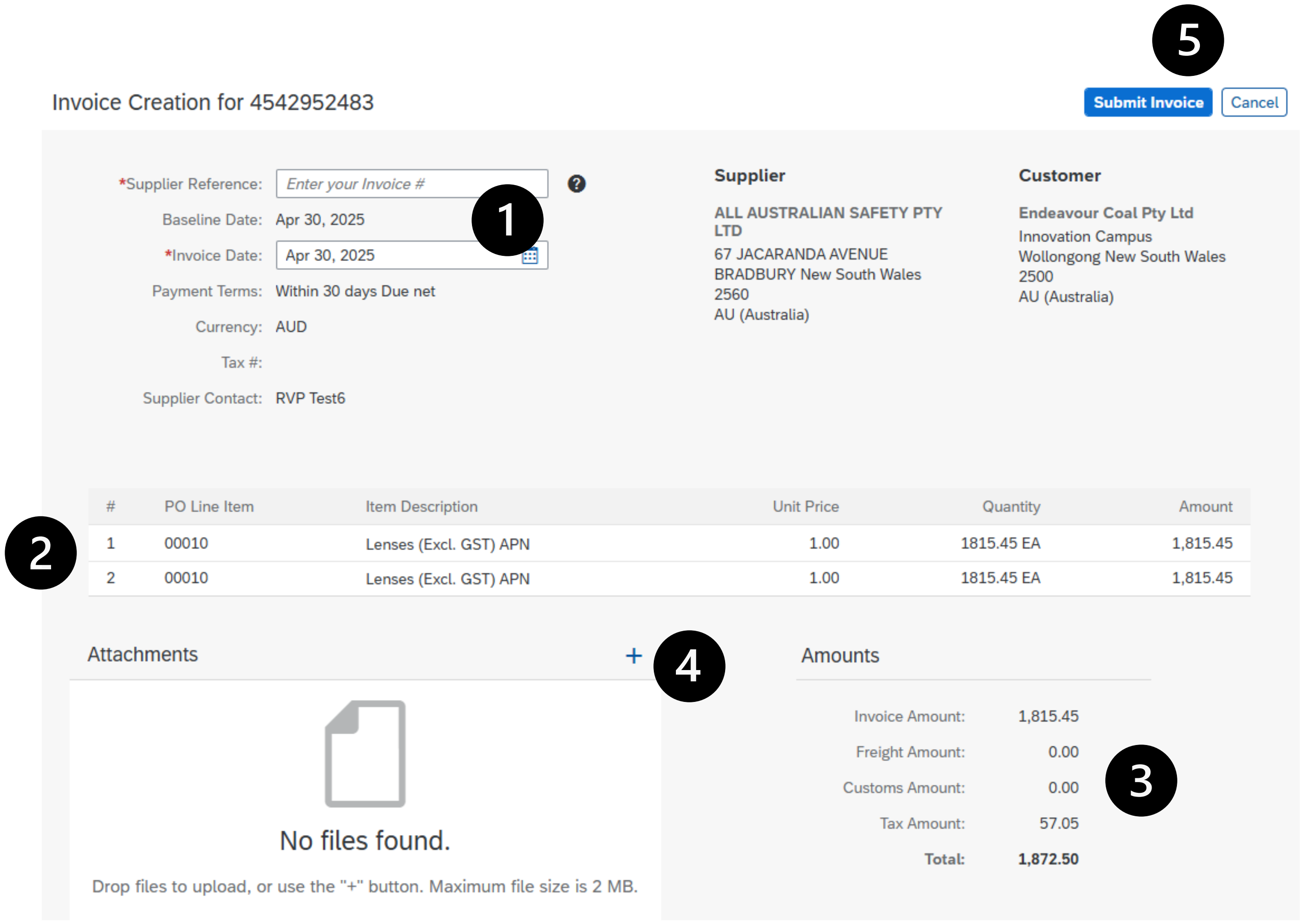


8. Submit Invoice – Detail Page

Step	Instruction	Screenshot
1	**Link to existing invoices for the selected purchase order**	
2	**List of documents to be invoiced** • Approved service entry sheets • Posted goods receipts	
3	**Click the link to see details of the document**	
4	**Select one or more documents and click Create Invoice**	

9. Submit Invoice – Create Page

Step	Instruction	Screenshot
1	**Header fields** • Supplier Reference (mandatory) • Invoice Date (mandatory, default to today)	
2	**Details of goods/services received from the GR/SES**	
3	**Summary of amounts**	
4	**Attachments** • One attachment is required • Click the + button or drag and drop files to attach	
5	**Action buttons** • Submit Invoice – this needs to be a text-based pdf • Cancel and return to detail page	



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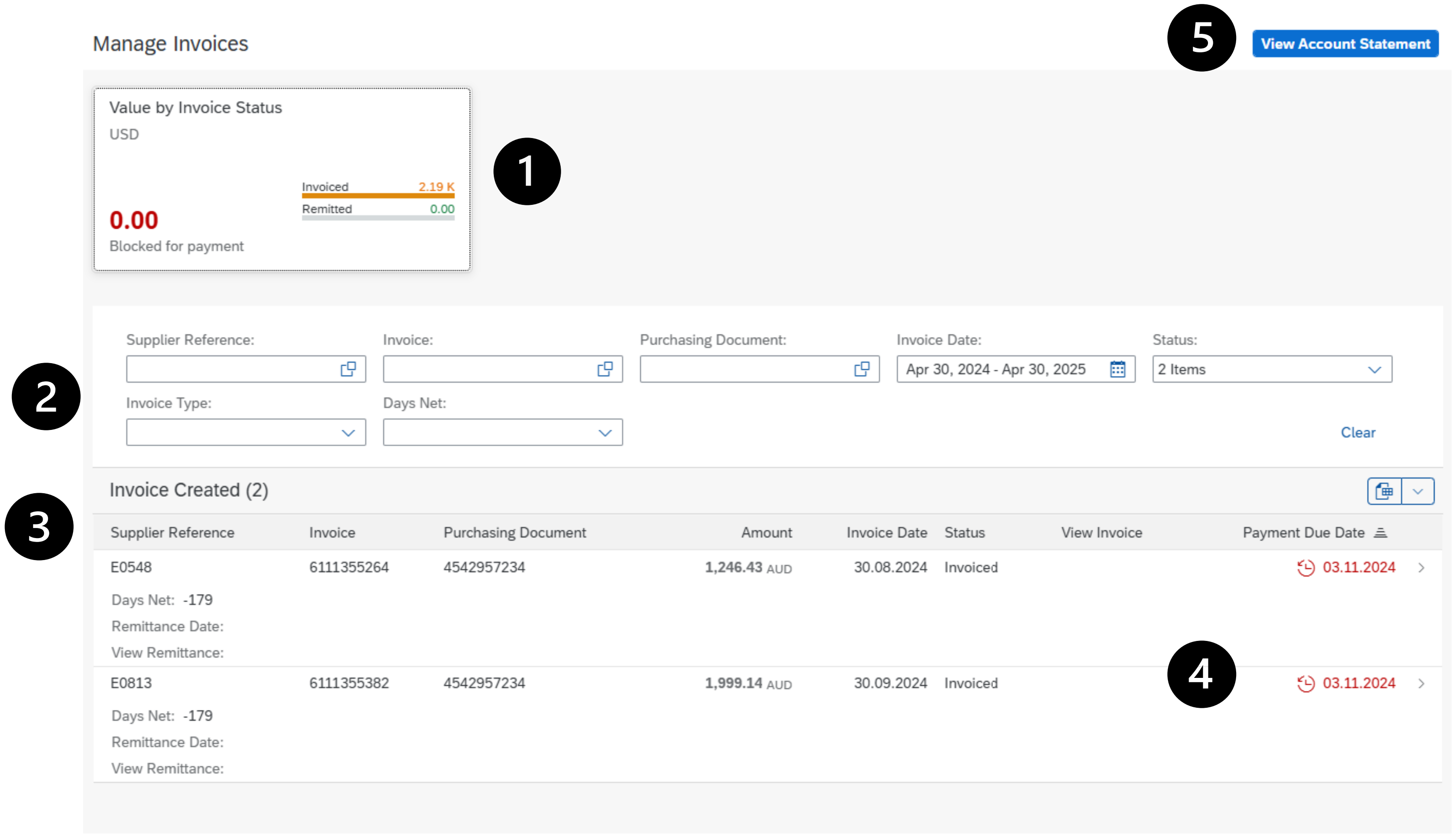
11. Manage Invoices – Landing Page

Step	Instruction	Screenshot
1	**Summary chart reflecting current filter selection criteria**	
2	**Filter options for modifying the list of existing invoices**	
3	**List of invoices meeting the filter criteria**	
4	**Click a line item to open the invoice detail page**	
5	**View account statement** • Must be configured in SAP (outside of the Manage Invoices app)	



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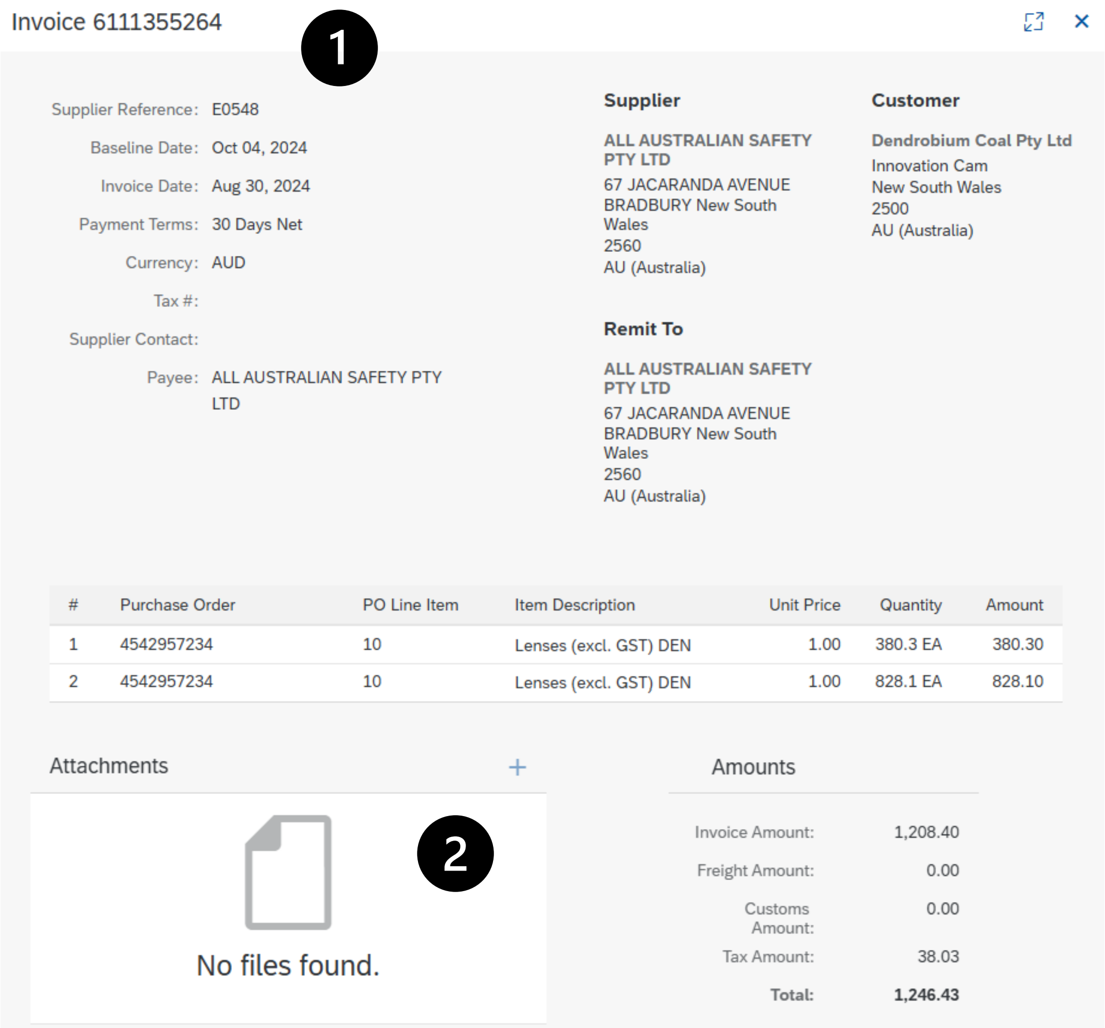
12. Manage Invoices – Invoice Detail Page

<table>
<tr><th>Step</th><th>Instruction</th><th>Screenshot</th></tr>
<tr><td>1</td><td>Details of the selected invoice</td><td rowspan="2">
</td></tr>
<tr><td>2</td><td>List of attachments
• Click the link to download and open an attached document</td></tr>
</table>