



## Service Delivery Plan

### Responding to a service delivery updates and invoicing

The Service Delivery Plan (SDP) is the framework through which the contract is managed and milestones recorded. Suppliers will submit a service delivery update and invoice amount in line with agreed contract milestones. As the contract owner, you must then approve or reject the update.

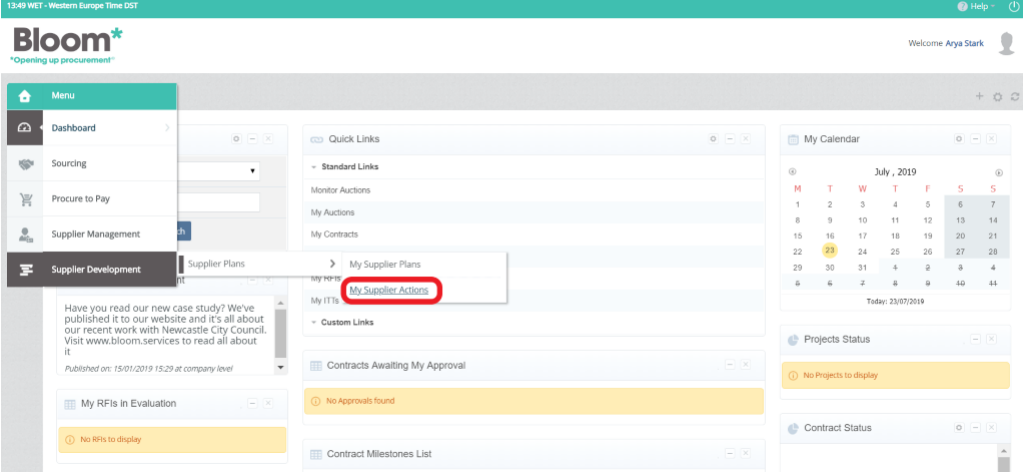
1. You should review the supplier submission (Page 2)  
This contains the suppliers update and requested invoicing amount for your review only.

2. You should complete the customer action step: (Page 5)  
This is a separate task you must complete to either approve the suppliers submission and trigger an invoice, or reject and request more information from the supplier.

If you reject....

3. You should reopen the supplier submission (Page 7)  
This is so the supplier can revise and resubmit the update for your review

## REVIEW SUPPLIER SUBMISSION – Reviewing the information submitted by the supplier

<p><b>Step 1:</b> Action the update notification</p> <p>When a supplier submits an update, you will receive an automated email from Pro-Vide 2.0</p> <ol style="list-style-type: none"><li>1. Review the information</li><li>2. Click the <b>action link</b></li><li>3. Login to Pro-Vide 2.0</li></ol> <p>The action link will take you directly to the supplier submission action line.</p>	<p><b>From:</b> auto-alert-pro-vide@bravosolution.com <b>Subject:</b> Action Supplier Submission SDP_xxx July 2020 Completed for Supplier xxx</p> <p>Dear xxx</p> <p>This is to inform you that the Action Supplier Submission SDP July 2020 for supplier xxx has been completed on Pro-Vide 2.0</p> <p>Action Scope: Action Start Date: xxx 2020 Action End Date: xxx 2020 Action Ownership: Supplier Buyer Action Owner: xxx Supplier Action Owner: xxx</p> <p>Buyer Organisation: Bloom Plan Code: sdp_xxx Plan Title: xxx</p> <p>To view the Action, click the following link and enter your Username and Password: <a href="https://pro-vide.bravosolution.com">https://pro-vide.bravosolution.com</a></p>
<p><b>NB:</b> You can also login to view actions at any time</p> <ol style="list-style-type: none"><li>1. Login to Pro-vid 2.0</li><li>2. Con the left hand menu go to: 'Supplier Development &gt; Supplier Plans &gt; My Supplier Actions</li></ol> <p>Here you will see all actions/SDPs that are assigned to you as contract manager.</p>	

You can then find the relevant supplier submission SDP line by searching the relevant project

e.g. PR00123 Supplier SDP March 2020

▶ Its status will show as 'Completed'

Action Name	Action Scope	SSS	Supplier Organisation	Buyer Owner	Supplier Owner	Action Status (Icon)	Action Status	Action Start Date	Action End Date	Collaboration Status
1 TEST SDP_554 Customer Approval 03/02/20			Test Supplier 2020	Test Terry	(Default)	🟢	In Progress	26/02/2020	28/02/2020	Never Started
2 TEST SDP_554 Supplier SDP 03/02/20			Test Supplier 2020	Test Terry	(Default)	🟡	Completed	14/02/2020	25/02/2020	Not Applicable
3 TEST SDP_554 Customer Approval 05/02/20			Test Supplier 2020	Test Terry	(Default)	🟡	Completed	13/02/2020	25/02/2020	Never Started

### Step 3: Review the submission

Here you can review the completed milestone update sent by the supplier.

1. Select **Collaboration Area** heading
2. Scroll down to the **collaboration form**
3. Review the question answers input by the supplier

Back to List Reopen Action Save as New Action

**Action: TEST SDP\_554 Supplier SDP 05/02/20** Completed

Supplier Organisation: Test Supplier 2020  
 Action Start Date: 13/02/2020 - Expected End Date: 25/02/2020  
 Action Ownership: Supplier  
 Plan: sdp\_554 - TEST - E2E Runthrough

Details **Collaboration Area** Messages (Unread 0)

---

**Overview**

**Action Description**  
 Please confirm the current status of delivery against plan and the percentage of planned invoice value you propose to submit for approval and receipt prior to your submission of the approved value



**Action Instructions**

**Instructional Attachment** (no file attached) **Buyer Attachments Visible to Supplier** Yes

**Collaboration Form**

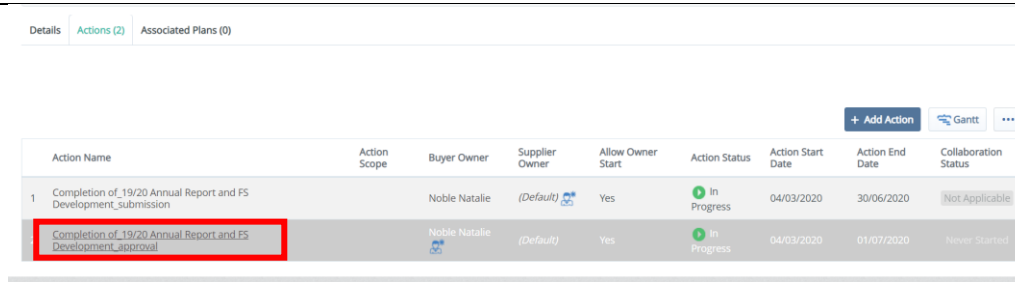
Question	Description	Response
What is the current status of delivery for this project?	Please select from the 3 options, what is the current status of delivery for this project: On track / Minor Delay / Major Delay	On track
What is the trend in status of delivery since last report?	Please select from the 3 options, what is the trend in status of delivery since last report: No change / Better / Worse	No change
Key deliverables / activities in this period	Please enter key deliverables / activities in this period	This is where the Supplier will document the deliverables/activities that they have completed this month for you to review.
Key deliverables / activities planned next period	Please enter key deliverables / activities planned next period	This is where the Supplier will enter their planned deliverables/activities that are planned for the next reporting period.
Delays and Remedial Action	Please detail any delays and remedial actions to be taken to ensure on time delivery of this project	This is where the Supplier will provide details of any slippage and planned remedial action required.
<b>Confirmation</b>		
Custom Delivery	Do you confirm that you have delivered all outcomes detailed in the work order as expected for this reporting period?	Yes
If 'No' to Custom Delivery	If No - What deliverables are outstanding and when do you expect them to be delivered?	
Invoice Value	Do you confirm that you will invoice the value detailed in the work order as expected for this reporting period?	Yes
If 'No' to Invoice Value	If No - What is the value to be invoiced. Please note if higher than the agreed schedule it is subject to change control.	

System Use Only

<p><b>IMPORTANT:</b></p> <p>You must review the invoice amount within the <b>Confirmation</b> section.</p> <p><i>When you accept the update, this is the amount that will be paid to the supplier.</i></p> <ol style="list-style-type: none"> <li>1. Review the answer to the question</li> </ol> <p>Do you want to invoice for the full value agreed for this reporting period /payment schedule?</p> 	<p>If <u>'Yes'</u>...</p> <p>The full amount for that payment schedule will be invoiced.</p> <p>You can find it in the <b>'Remaining Value Available'</b> heading sat just below the response.</p> <hr/> <p>If <u>'No'</u> ...</p> <p>The supplier will specify the Invoice Value within the "If 'No' to Invoice Value" question.</p>
<p><b>Step 4:</b> Open the supplier submission action line</p> <ol style="list-style-type: none"> <li>1. Scroll to the top of the page</li> <li>2. Click 'Back to List'</li> </ol>	

3. Find the approval line and select

*e.g. PR00123 SDP Approval - March 2020*



Action Name	Action Scope	Buyer Owner	Supplier Owner	Allow Owner Start	Action Status	Action Start Date	Action End Date	Collaboration Status
1 Completion of 19/20 Annual Report and FS Development Submission		Noble Natalie	(Default)	Yes	In Progress	04/03/2020	30/06/2020	Not Applicable
Completion of 19/20 Annual Report and FS Development Approval		Noble Natalie	(Default)	Yes	In Progress	04/03/2020	01/07/2020	Never Started

### CUSTOMER ACTION – Sending your response to the supplier submission

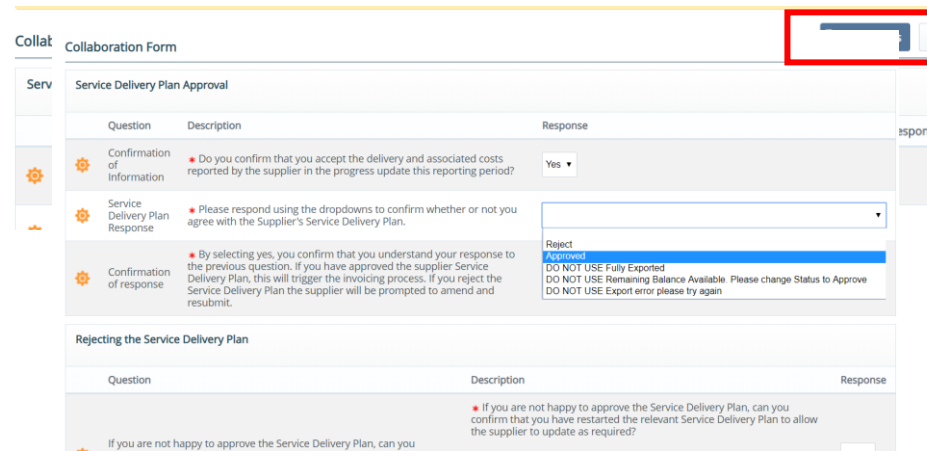
#### Step 5: Submitting your response

1. In the **Collaboration Area** scroll down to **collaboration form**
2. Click **'Edit Values'**
3. Submit appropriate responses to the questions

**NB.** It will ask you three approval questions

The 'Service delivery plan response' question will ask you to **Approve** or **Reject** the submission.

If you approve, the invoice amount within the supplier submission (Step 3) will be paid.



Collat Collaboration Form

Serv Service Delivery Plan Approval

Question	Description	Response
Confirmation of Information	Do you confirm that you accept the delivery and associated costs reported by the supplier in the progress update this reporting period?	Yes
Service Delivery Plan Response	Please respond using the dropdowns to confirm whether or not you agree with the Supplier's Service Delivery Plan.	
Confirmation of response	By selecting yes, you confirm that you understand your response to the previous question. If you have approved the supplier Service Delivery Plan, this will trigger the invoicing process. If you reject the Service Delivery Plan the supplier will be prompted to amend and resubmit.	Reject Approved DO NOT USE Fully Exported DO NOT USE Remaining Balance Available. Please change Status to Approve DO NOT USE Export error please try again

Rejecting the Service Delivery Plan

Question	Description	Response
	If you are not happy to approve the Service Delivery Plan, can you confirm that you have restarted the relevant Service Delivery Plan to allow the supplier to update as required?	

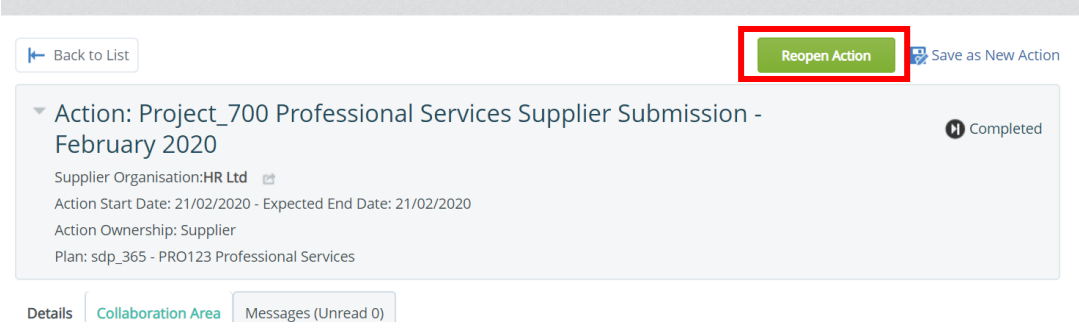
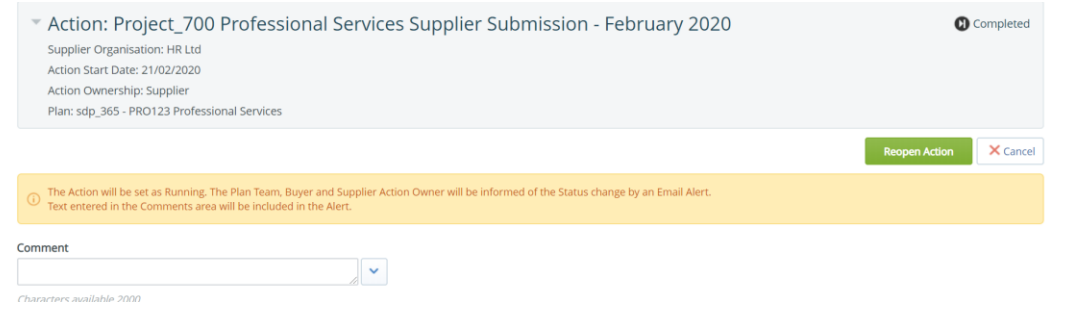
**Step 6:** Save and approve

1. Scroll to the top of the page and click **'Save'**
2. Once saved, click **'Complete Action'**
3. You will be asked to add any comments – if you have rejected the updated, add reasons here
4. Then click **'Complete Action'** for a second time

**NB** If you have approved the update the auto-invoicing and payment process will now have been triggered.

The screenshot displays a software interface with two action items. The top item is titled "Action: Completion of\_19/20 Annual Report and FS Development\_approval" and is marked as "In Progress". It includes details such as "Supplier Organisation: Orchard Media and Events Group", "Action Start Date: 04/03/2020 - Expected End Date: 01/07/2020", "Action Ownership: Buyer", and "Plan: sdp\_967 - Contract\_964 19/20 Annual Report and FS Development". A "Save" button is highlighted with a red box. Below this is a "Collaboration Form" section. The bottom item is titled "Action: Invoice Test Approval - 003" and is also marked as "In Progress". It includes details such as "Supplier Organisation: HR Ltd", "Action Start Date: 04/03/2020 - Expected End Date: 03/04/2020", "Action Ownership: Buyer", and "Plan: sdp\_366 - Invoice Test". A "Complete Action" button is highlighted with a red box. A "Back to List" button is visible on the left, and a "Cancel Action" button is on the right.

## REOPEN SUPPLIER SUBMISSION – You have rejected the information provided by the supplier

<p><b>Step 7:</b> Reopen the Supplier SDP line</p> <p>To allow the supplier to update their submission, you must reopen the SDP line.</p> <ol style="list-style-type: none"><li>1. Find the SDP line <i>e.g. PR00123 Supplier SDP March 2020</i></li><li>2. Click '<b>Reopen Action</b>'</li></ol>	 <p>The screenshot shows a user interface for a supplier submission. At the top right, there is a green button labeled 'Reopen Action' which is highlighted with a red rectangle. To its left is a 'Back to List' button and to its right is a 'Save as New Action' button. Below these buttons is a card for 'Action: Project_700 Professional Services Supplier Submission - February 2020'. The card includes details such as 'Supplier Organisation: HR Ltd', 'Action Start Date: 21/02/2020 - Expected End Date: 21/02/2020', 'Action Ownership: Supplier', and 'Plan: sdp_365 - PRO123 Professional Services'. At the bottom of the card, there are tabs for 'Details', 'Collaboration Area', and 'Messages (Unread 0)'. The status of the action is shown as 'Completed'.</p>
<p><b>Step 8:</b> Add a reason for rejection</p> <ol style="list-style-type: none"><li>1. Add a reject note into the comment field</li></ol> <p>e.g. Over-invoicing should be £xxxx</p>	 <p>The screenshot shows the same interface as above, but with the 'Reopen Action' button highlighted in green and a 'Cancel' button next to it. Below the action card, there is a yellow alert box with a warning icon and the text: 'The Action will be set as Running. The Plan Team, Buyer and Supplier Action Owner will be informed of the Status change by an Email Alert. Text entered in the Comments area will be included in the Alert.' Below the alert box is a 'Comment' field with a dropdown arrow and a character count 'Characters available 2000'.</p>

**Step 9:** Confirm reopen action

1. Click '**Reopen Action**' for a second time

The supplier will now be able to review and resubmit their update.

You must then repeat the process from **Step 1**

▼ Action: Project\_700 Professional Services Supplier Submission - February 2020 Completed

Supplier Organisation: HR Ltd  
Action Start Date: 21/02/2020  
Action Ownership: Supplier  
Plan: sdp\_365 - PRO123 Professional Services

**Reopen Action** Cancel

*The Action will be set as Running. The Plan Team, Buyer and Supplier Action Owner will be informed of the Status change by an Email Alert. Text entered in the Comments area will be included in the Alert.*

Comment  
Over invoicing, the actual amount was £1500

Characters available 1957

Action Start Date (Today)      Action End Date 03/04/2020