PTT Public Company Limited

PTT Vendor Management System

User Manual

For PTT Vendor Part 2

Version 1.3 / Dec 2024

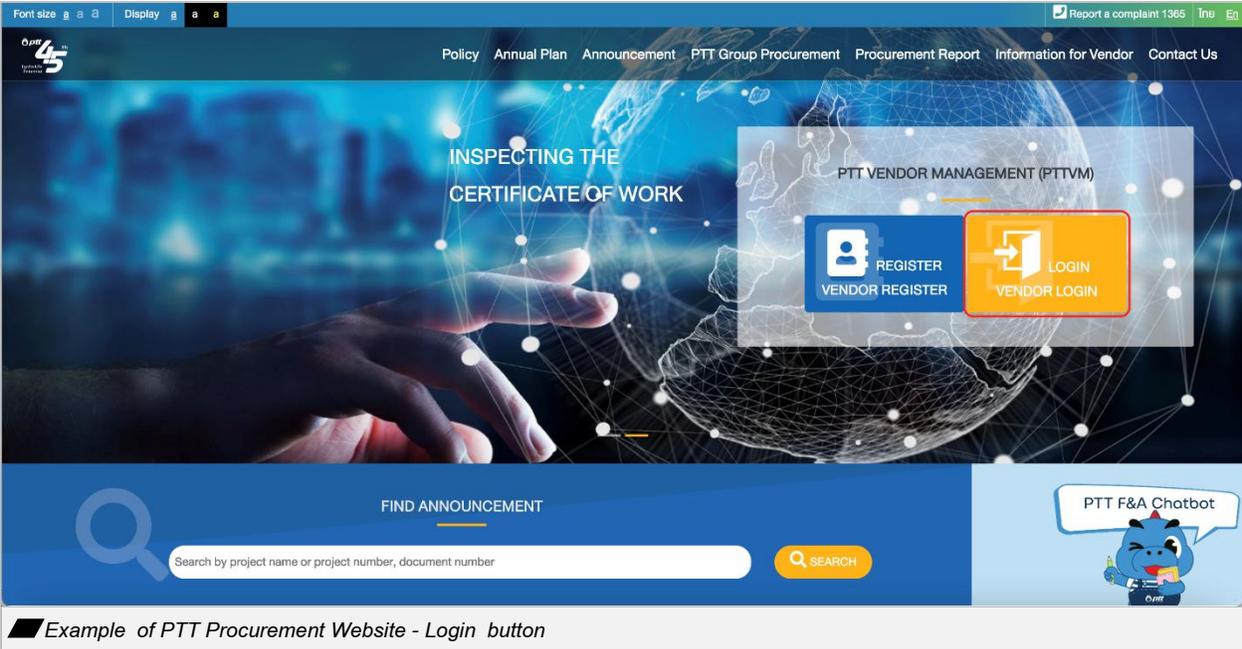## Table of Contents

PTT Vendor Management System

    PTT Vendor Management (PTTVM) is a system developed by PTT Public Company Limited (PTT) to assist and support vendors. It enhances communication channels and provides access to information regarding PTT's procurement processes for vendors who have or haven't previously transacted with PTT. This system allows companies that have conducted business with PTT to update their products, services, or company information. Additionally, it enables vendors to receive notifications for attending procurement events, track the status of contracts with PTT, proceed with contract formalities, and review performance assessment results.

    If you're a vendor from a subsidiary of the PTT Group, you can create an anonymous power of attorney document to submit bidder qualification documents online through the PTTVM system. For general vendors, registration is open to access the system, provide information on products and services, and promote their companies."

1. PTT Bid Submission

Vendors can act on online trading/filing envelopes using this interface. Vendors can log into the PTTVM system and view their online trading information or submit envelopes online. the next 2 channels:

1. If using the PTT Procurement Website, enter the URL and hit the button, to get to the login page.


◼ *Example of PTT Procurement Website - Login button*

- If you're accessing using PTT Vendor Management (PTTVM), enter the information at https://pttvm.pttplc.com/index.html#/app/signin. Specify the user type as vendor, then click the button, to log in.
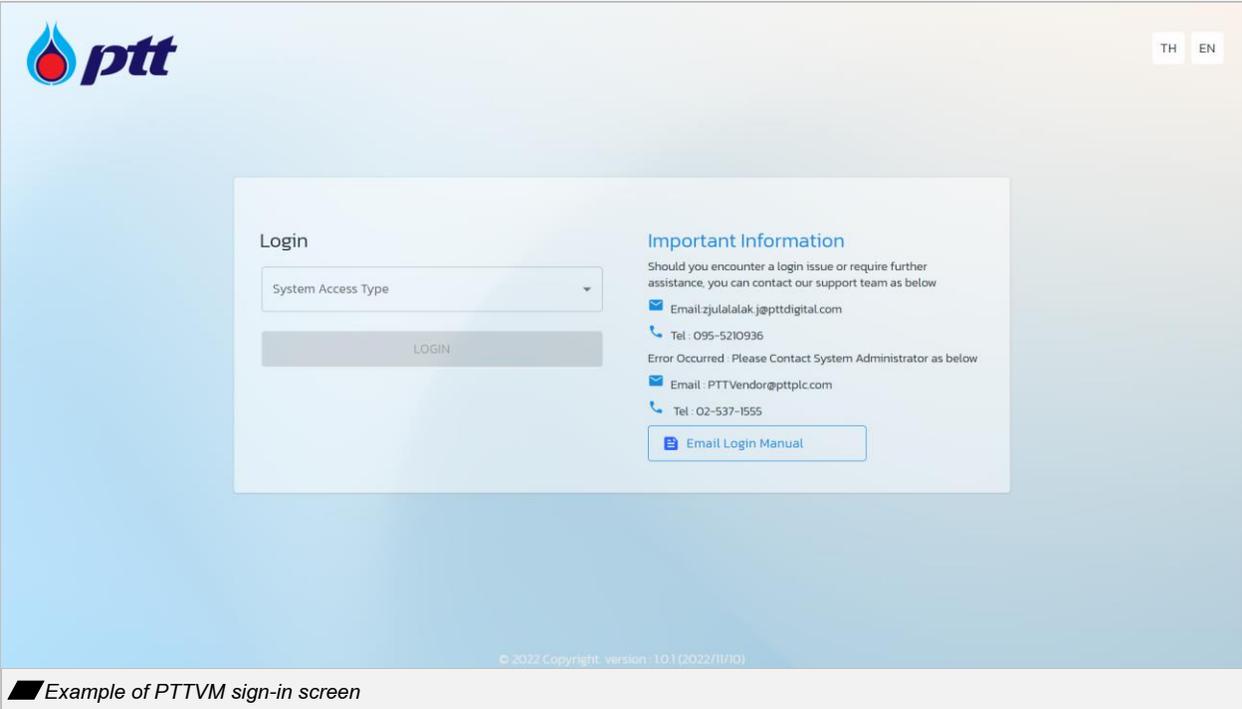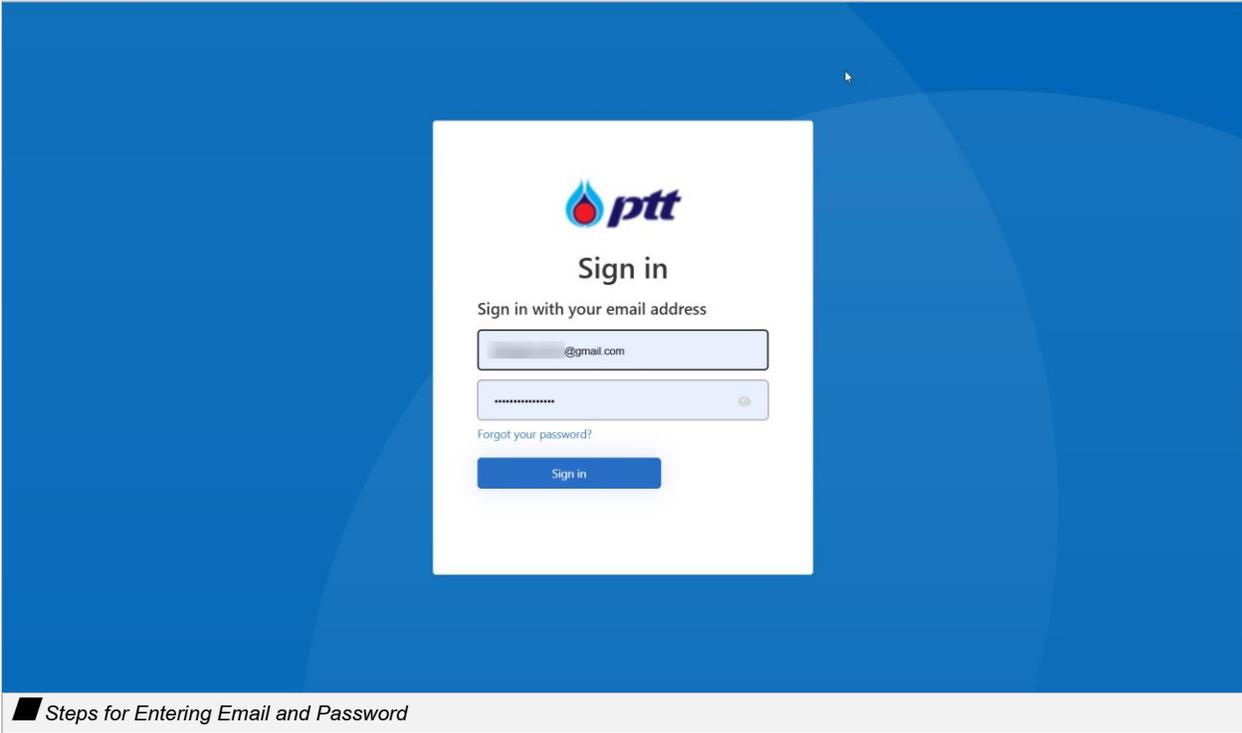
■ *Example of PTTVM sign-in screen*

For Vendors the login process to the PTT Vendor Management System can be done as follows:
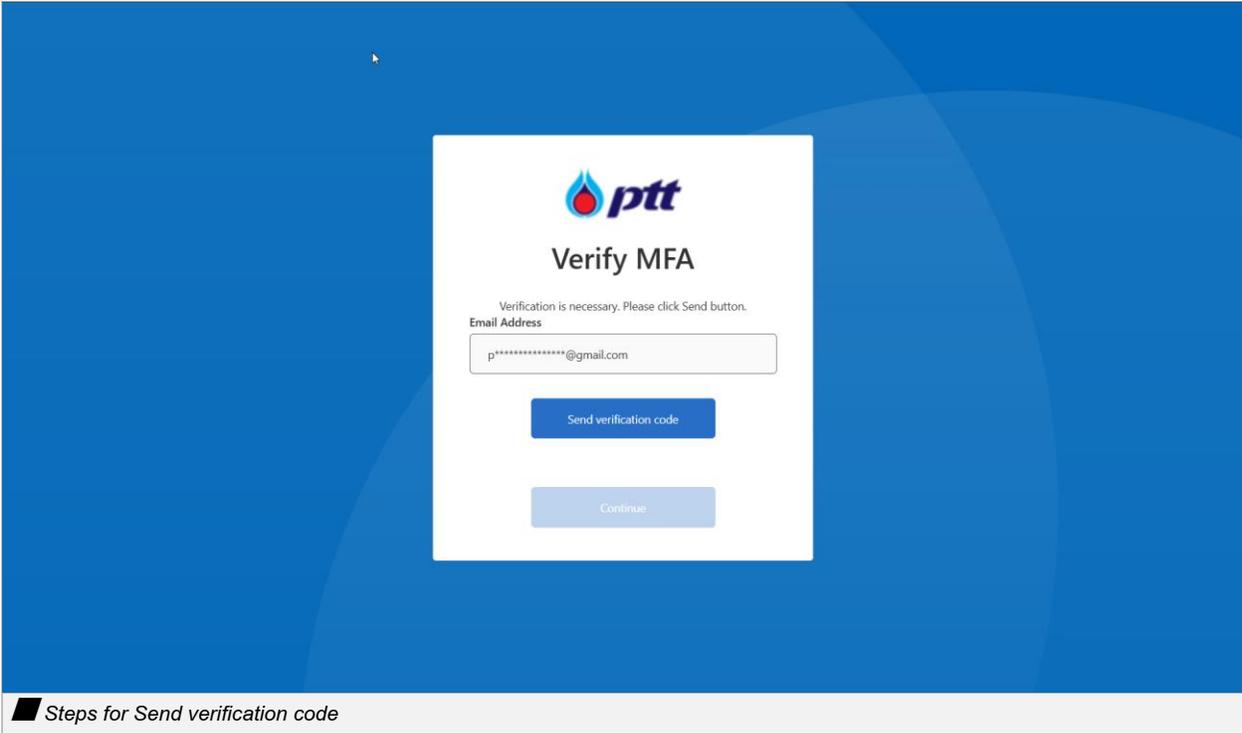
Select your user type and click "Login."
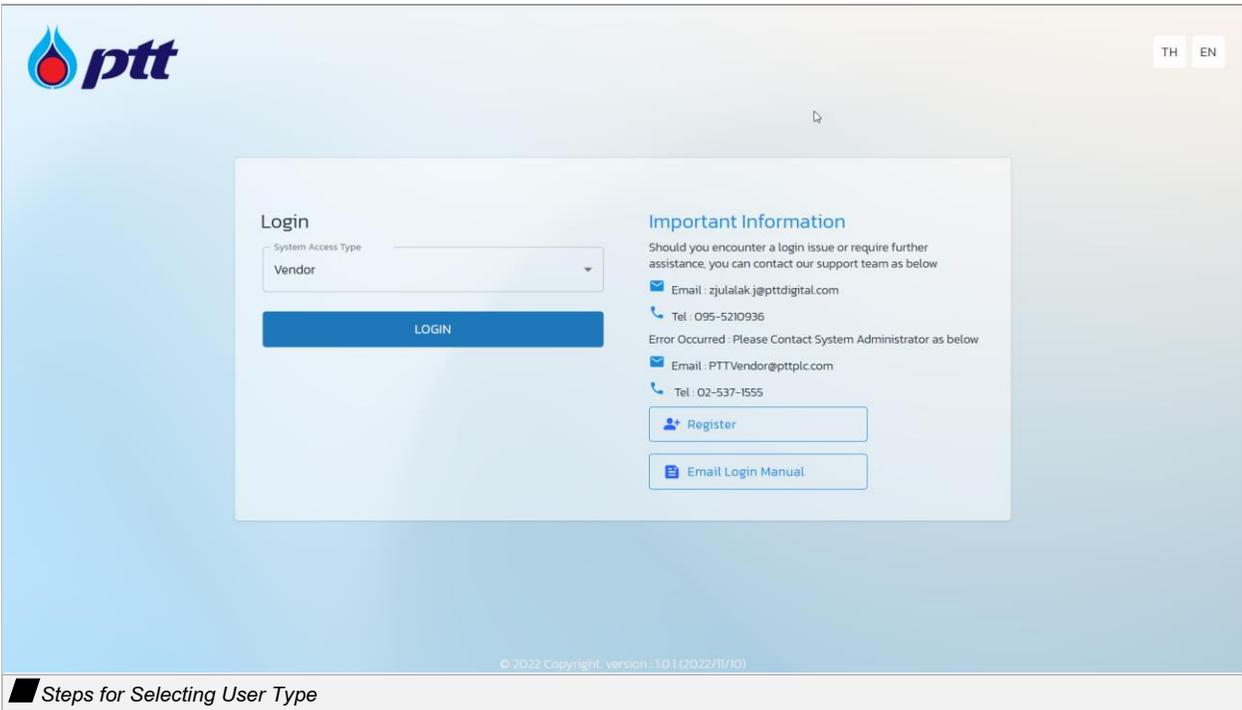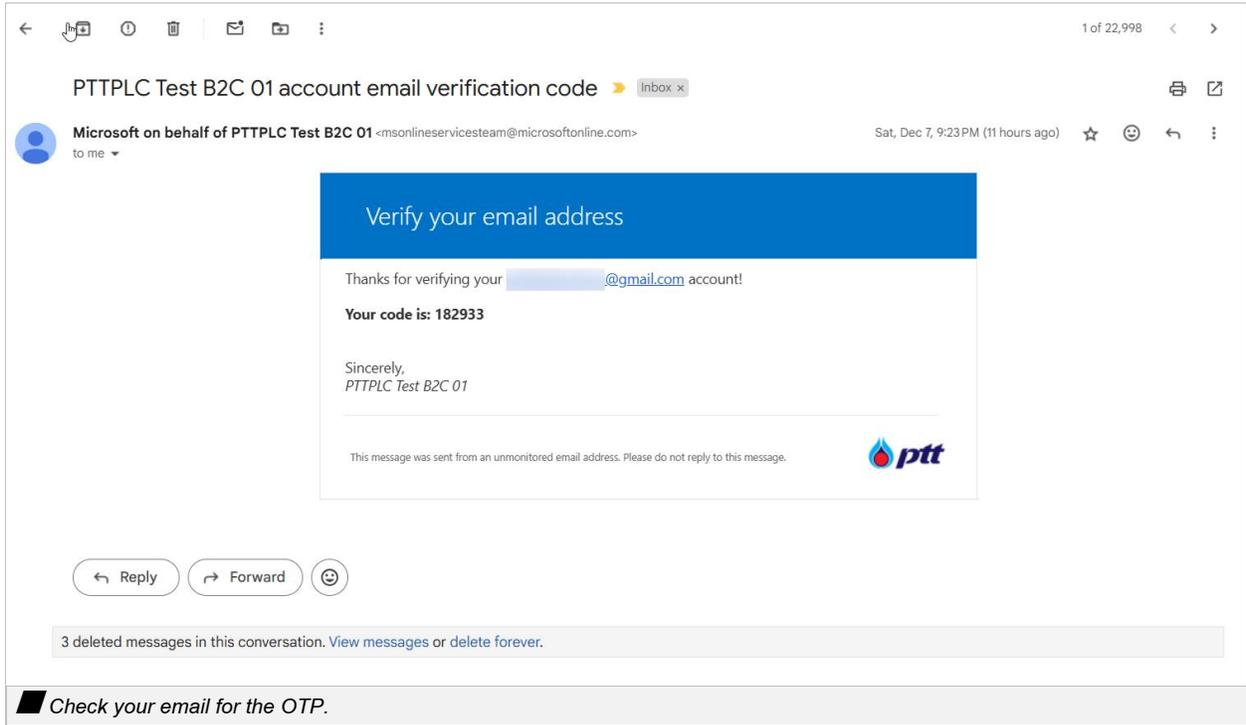

■ *Steps for Selecting User Type*

Enter your email and password, then click "Sign in."

■ Steps for Entering Email and Password

click "Send verification code"

■ Steps for Send verification code

Check your email for the OTP.

Check your email for the OTP.

Enter the OTP and click "Verify Code." (If you haven't received the OTP, click "Send New Code" to request a new one.)
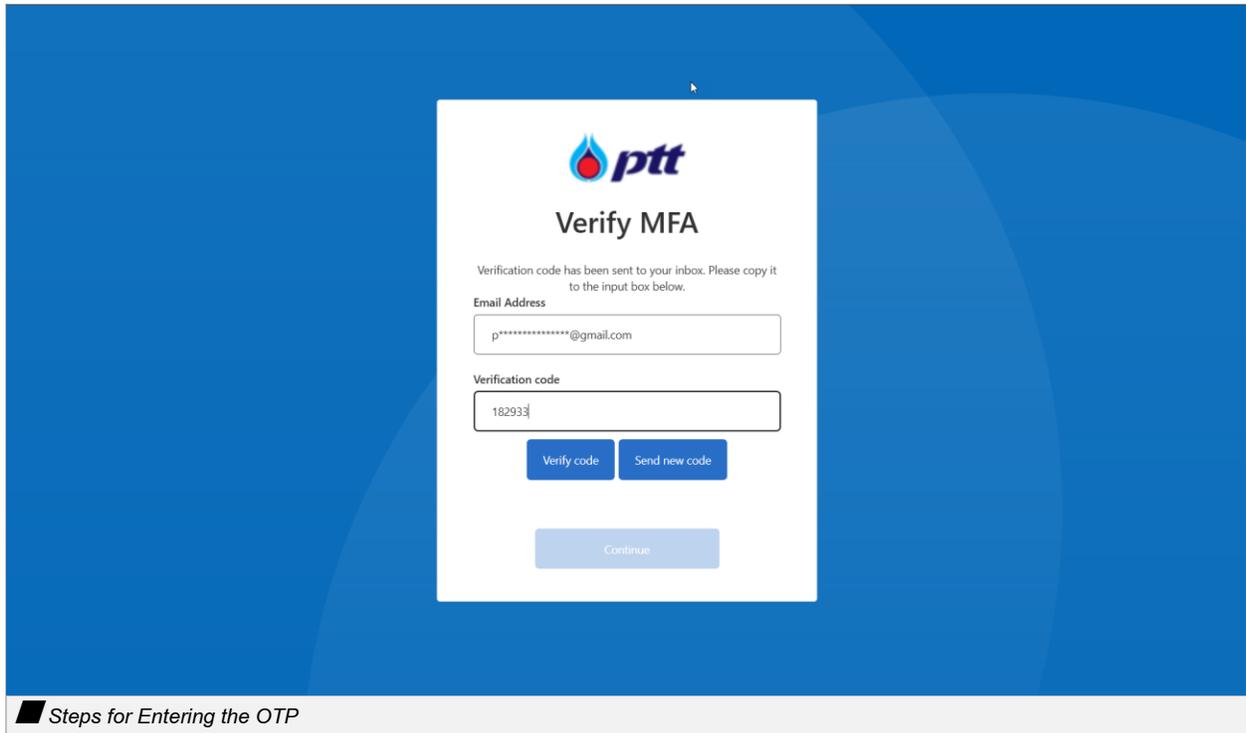
Steps for Entering the OTP

Once you have successfully logged in, you will be directed to Web Portal PTTVM screen as seen in the picture.
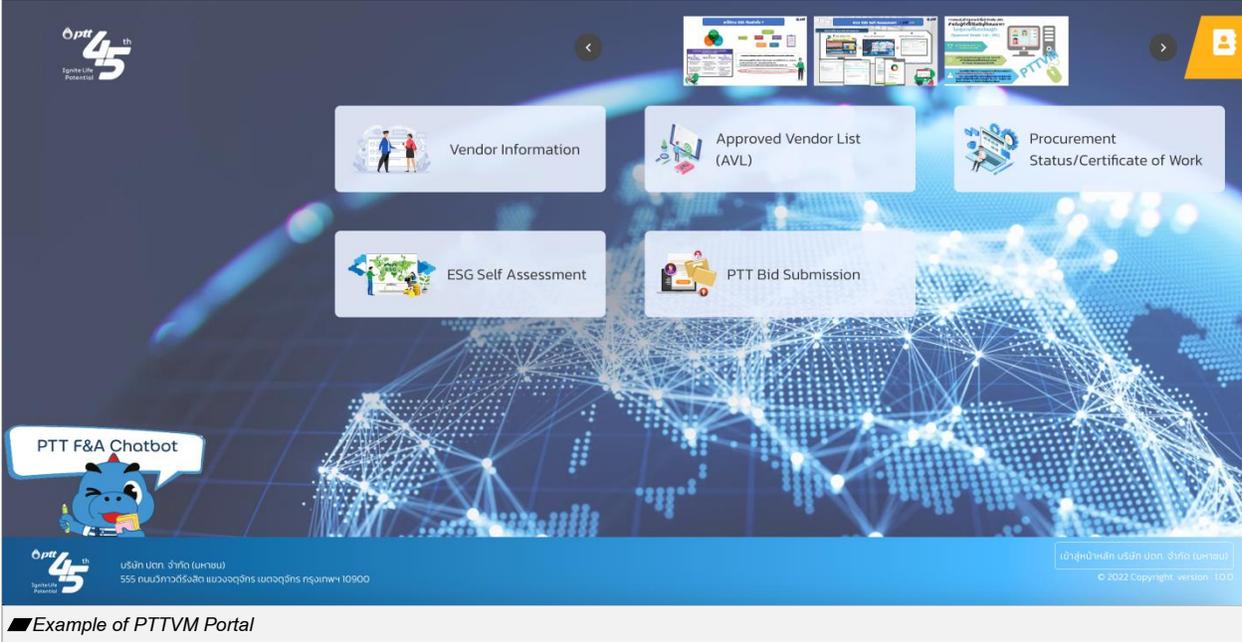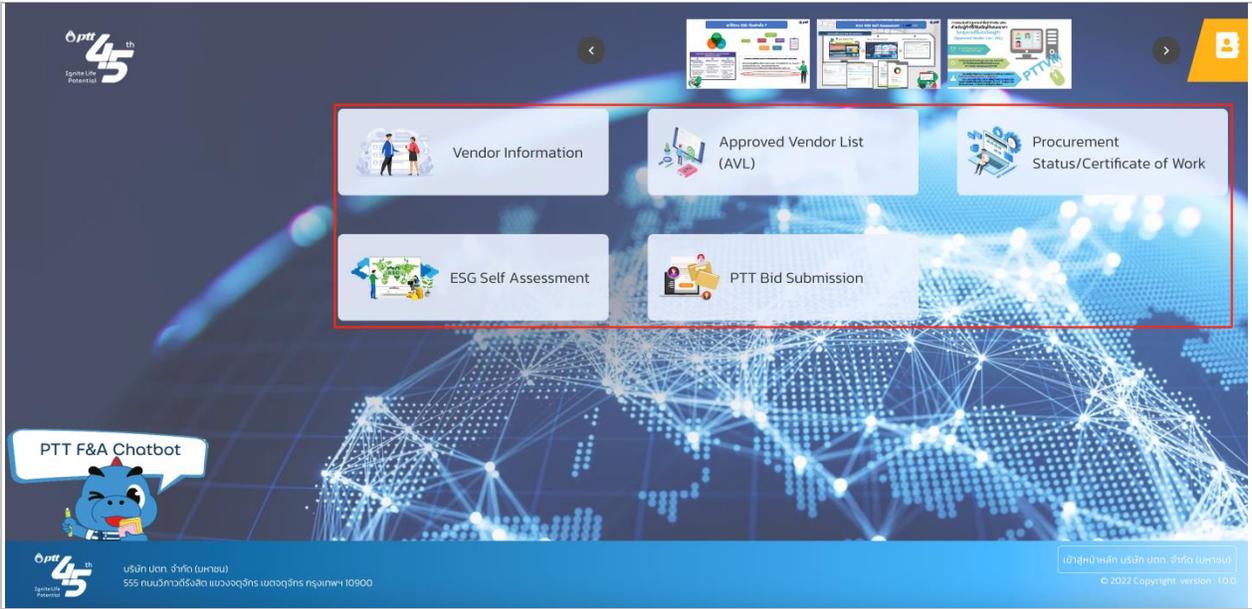

◼Example of PTTVM Portal

Vendors can access a variety of features by selecting them from the menu box on the Main Menu screen or the menu bar on the right, as seen in the picture.

Example of PTTVM Portal

Example of Menu Bar display on PTTVM Portal Screen
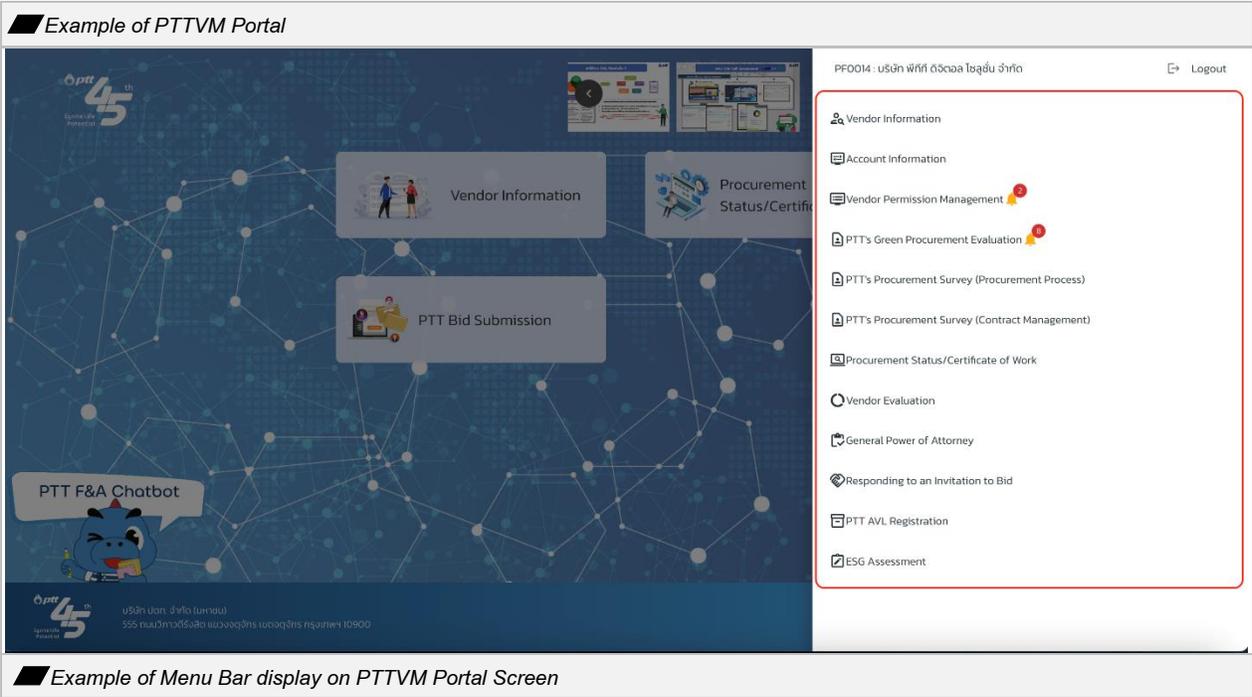
The PTT Bid Submission system page will be displayed when you select "PTT Bid Submission" from the menu. as seen in the picture. (Users can learn more about how to use it from Manual PTT Bid Submission)

Example of PTTVM Portal
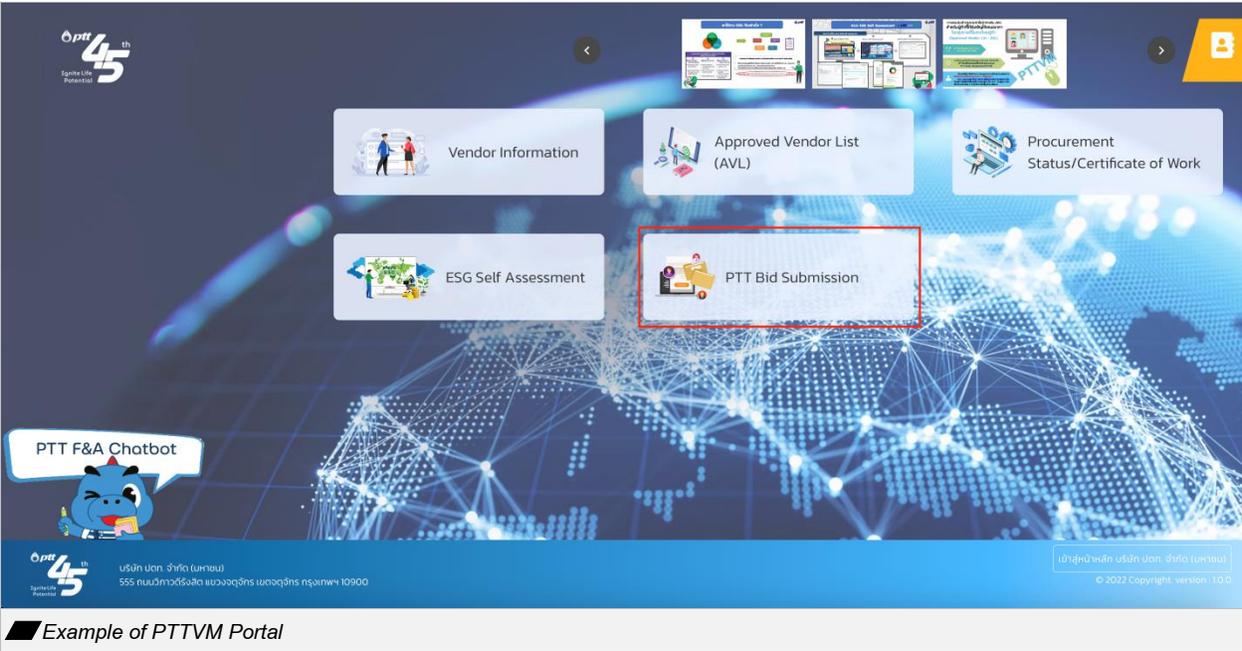
▰ *Example of PTT Bid Submission menu display*

2. PTT Electronic Bank Guarantee (e-BG)

The vendor who will access the screen must be 3 authorized to use the contract collateral system in order to take any necessary action about the contract collateral or Electronic Bank Guarantee. Vendors can access the PTTVM system's contract margin information by logging in. the next 2 channels:

- When using the PTT Procurement Website, enter the URL and click the button, [LOGIN VENDOR LOGIN]. Log in as seen in the image to access the Login page.

■ *Example of PTT Procurement Website - Login button*

- If you're accessing using PTT Vendor Management (PTTVM), enter the information at https://pttvm.pttplc.com/index.html#/app/signin. Enter your username and password, then click the button, [LOGIN] to log in.

▰ *Example of PTTVM sign-in screen*

When you press the button, LOGIN after entering your username and password, the system will display the Web Portal PTTVM screen as seen in the picture.
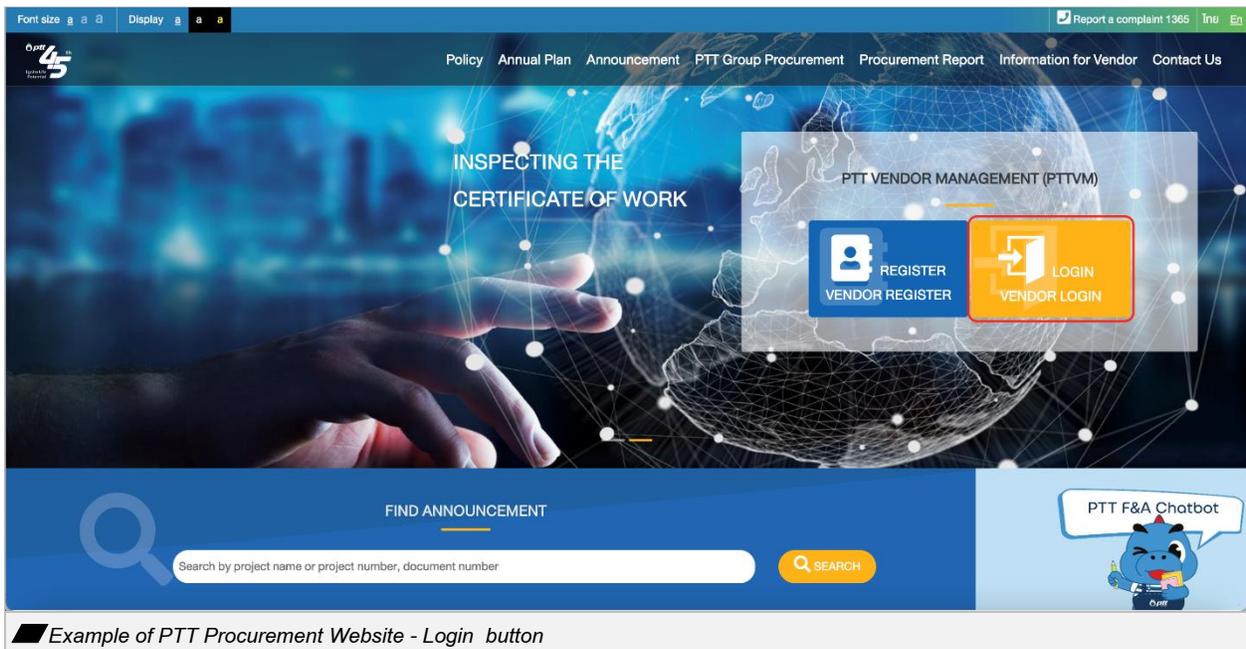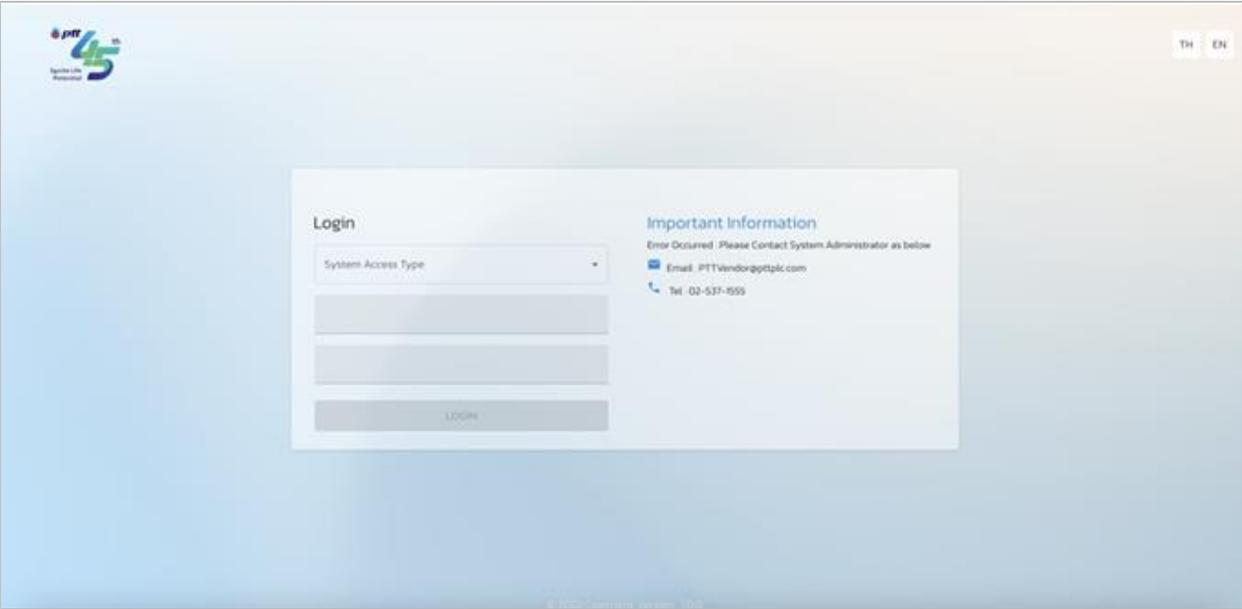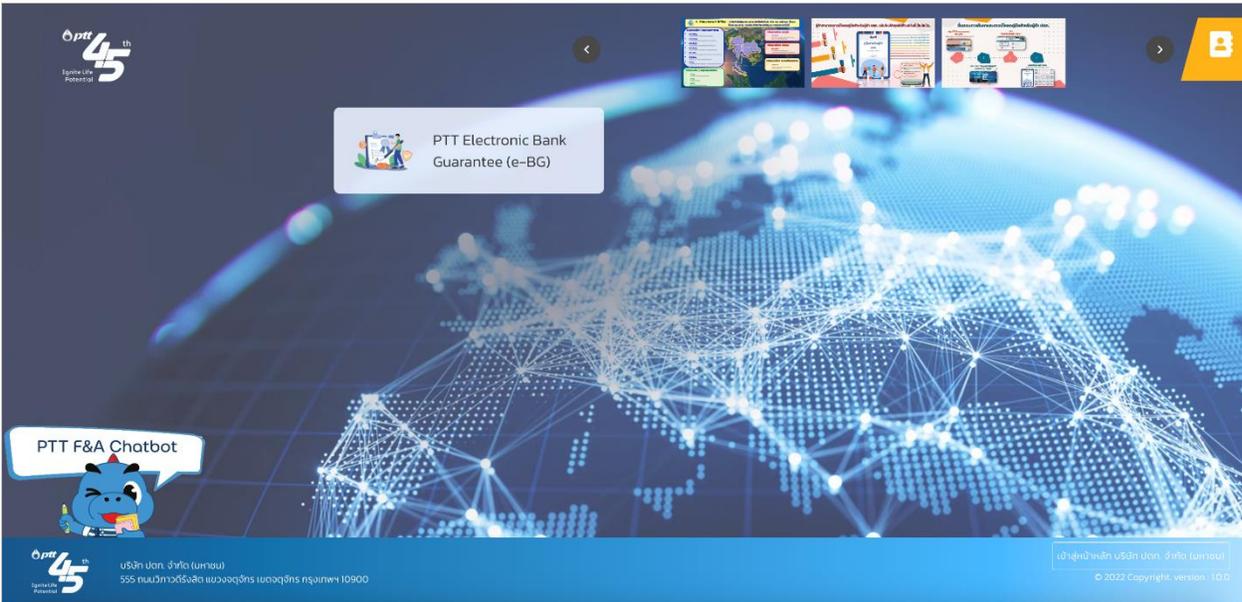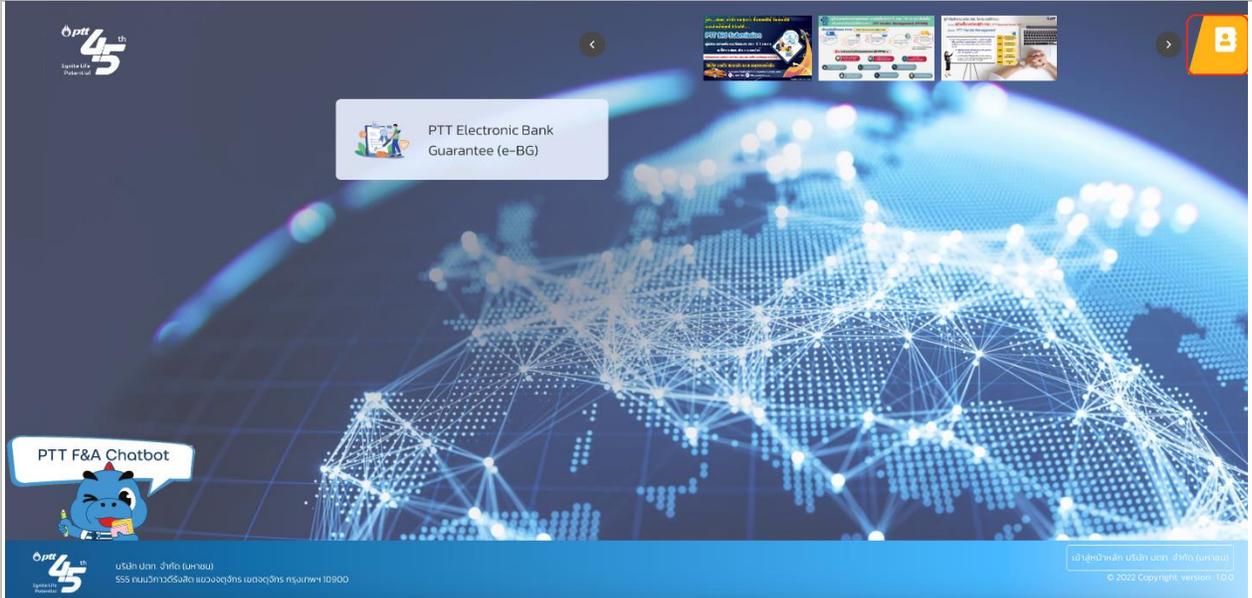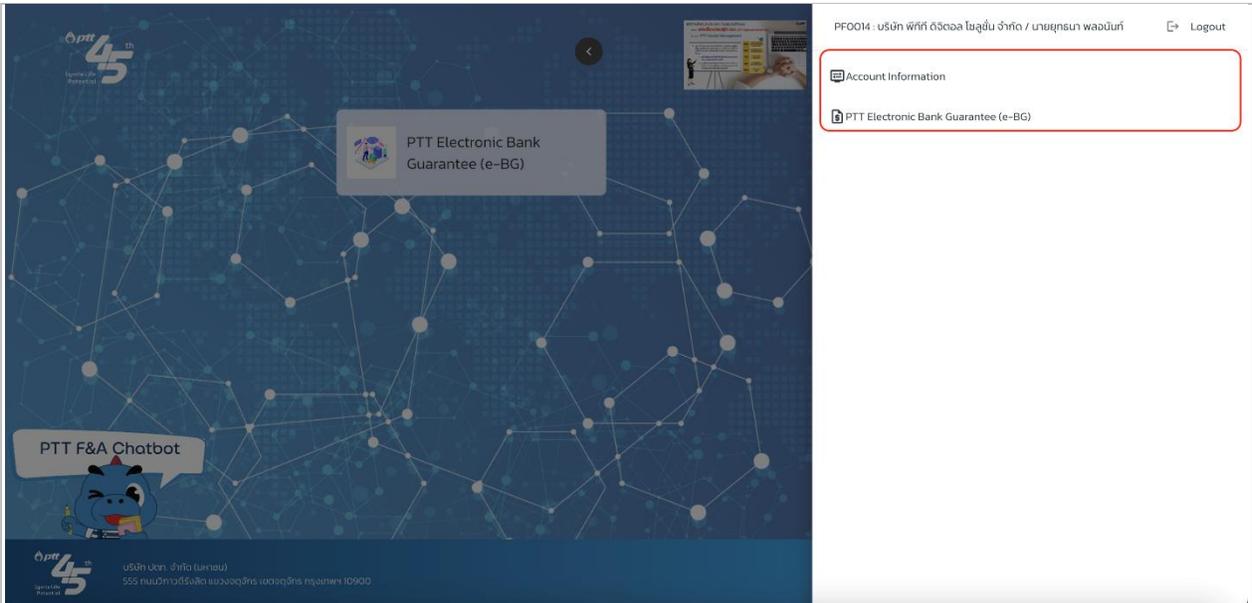

▰ *Example of PTTVM Portal*

Vendors can access a variety of features by selecting them from the menu box on the Main Menu screen or the menu bar to the right, as seen in the picture.
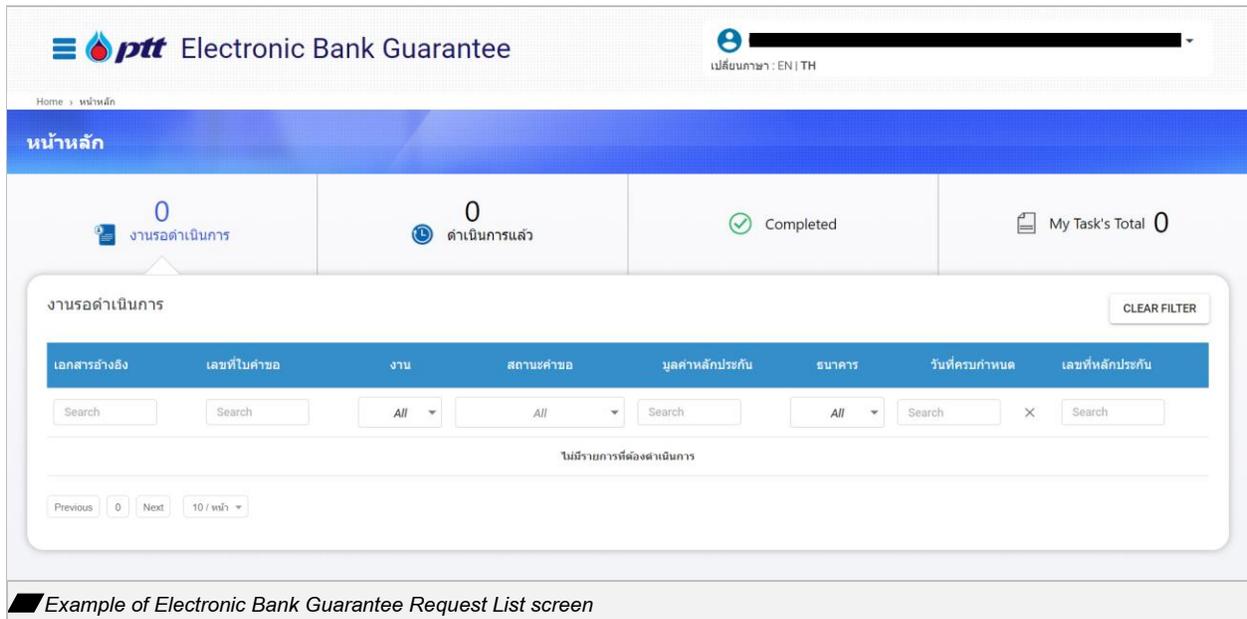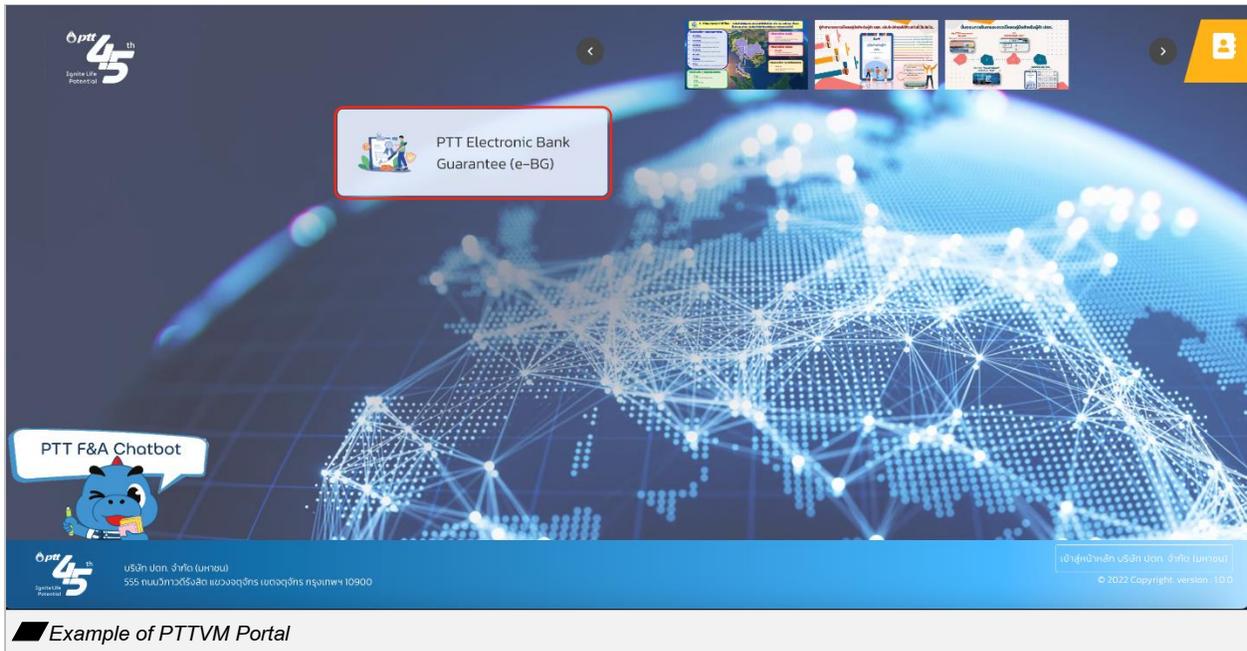

◼ *Example of PTTVM Portal*

◼ *Example of Menu Bar display on PTTVM Portal*

When you choose the "PTT Electronic Bank Guarantee (e-BG)" menu item, the page for the Contract Margin System that is seen in the image will open.

(Users can learn more about how to use it from Manual e-BG)

Example of PTTVM Portal

Example of Electronic Bank Guarantee Request List screen
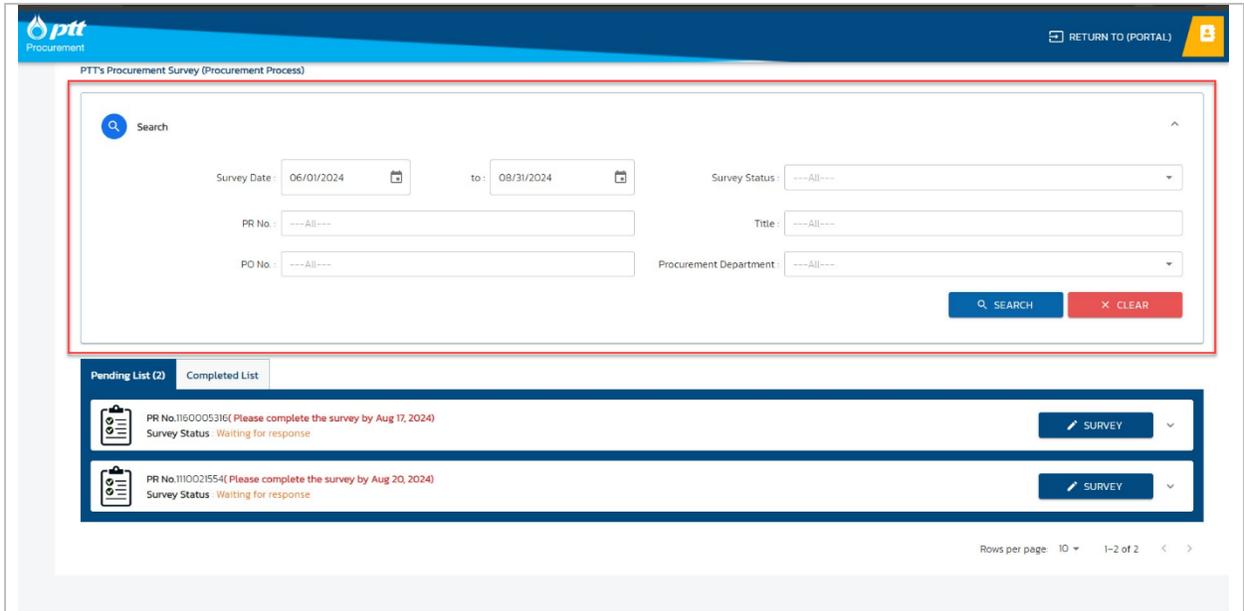
3. PTT's Procurement Survey (Procurement Process)

Vendors shall feedback PTT's procurement process satisfaction by clicking on the menu "PTT's Procurement Survey (Procurement Process)"

The icon [bell icon with 4] displaying a number indicates pending surveys awaiting your feedback.
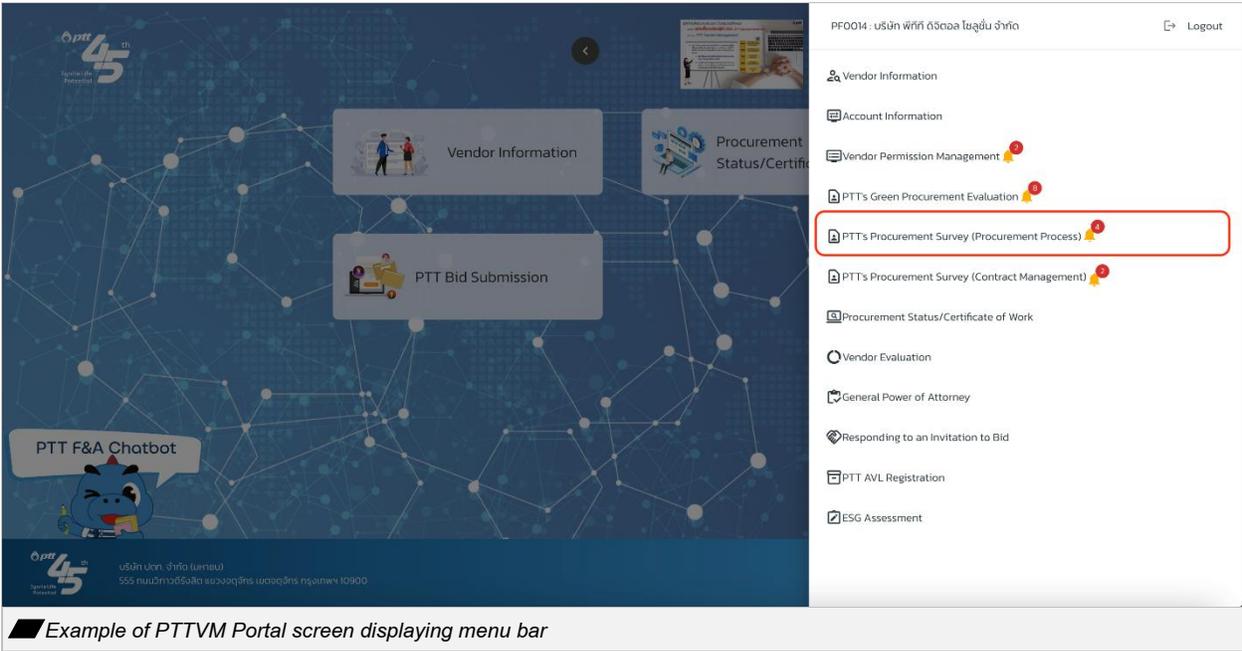
◼ *Example of PTTVM Portal screen displaying menu bar*

Vendors can fill in certain information to search for pending and completed PTT's Procurement Surveys (Procurement Process). The system will display your survey by default, with the date set to the past 3 months.

Example of a search screen for PTT's Procurement Surveys (Procurement Process)

Show search details

Field	Description
Survey Date	Enter th period date
Survey Status	There are 3 assessment statuses: 1. Waiting for response 2. Complete 3. Survey time's up
PR No.	Enter PR number
Title	Enter Job title
PO No.	Enter PO number
Procurement Department	Select a procurement department
SEARCH	Press the search button, the system will display information according to the conditions specified on the screen.
CLEAR	Press the Clear Options button, the system will clear the conditions indicated on the screen.

Vendor shall complete the survey showing on the pending list. After the vendor completes the survey, the system will display them on the completed list
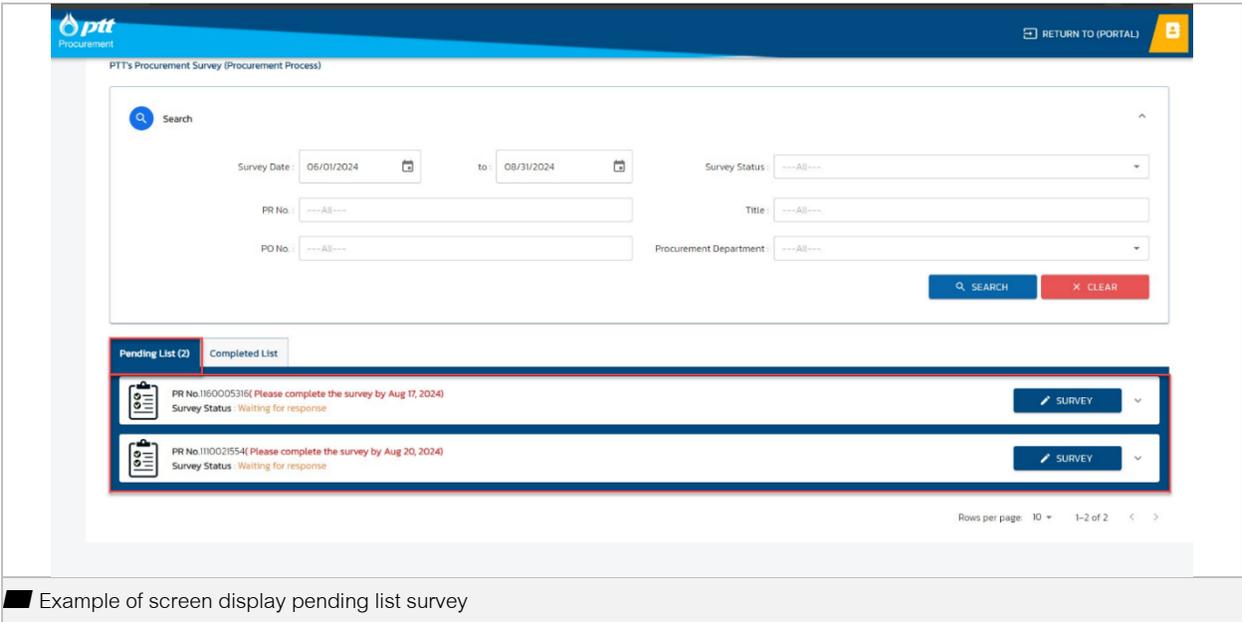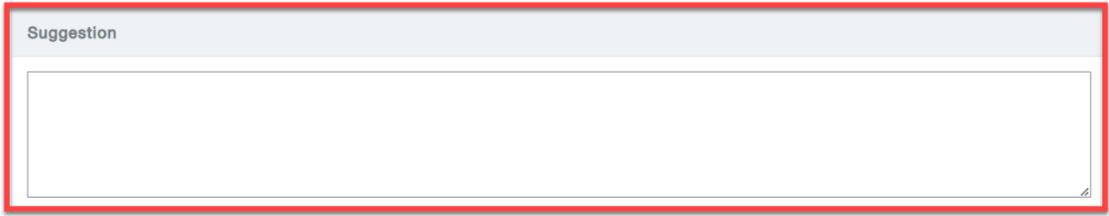
Example of screen display pending list survey

When the vendor clicks the button, [SURVEY] to finish the evaluation, the system displays the PTT's Procurement Surveys (Procurement Process)
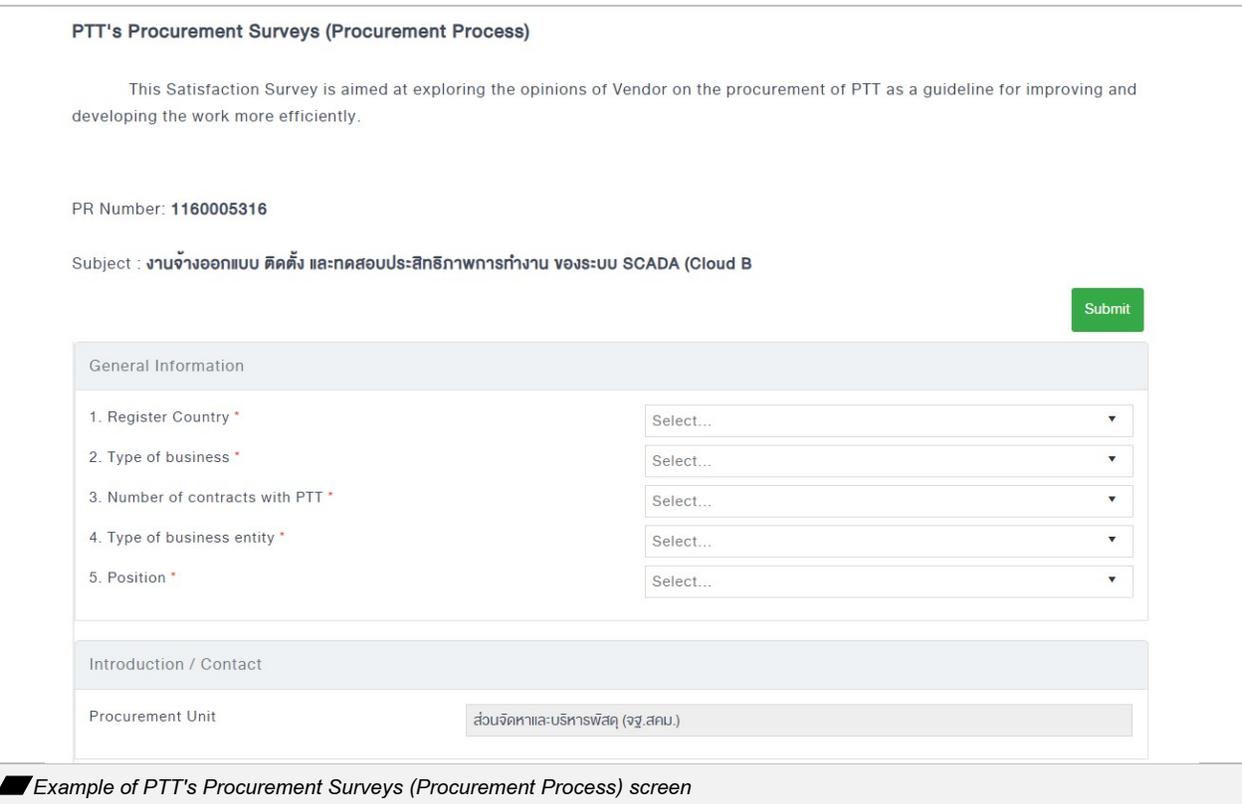
Example of PTT's Procurement Surveys (Procurement Process) screen

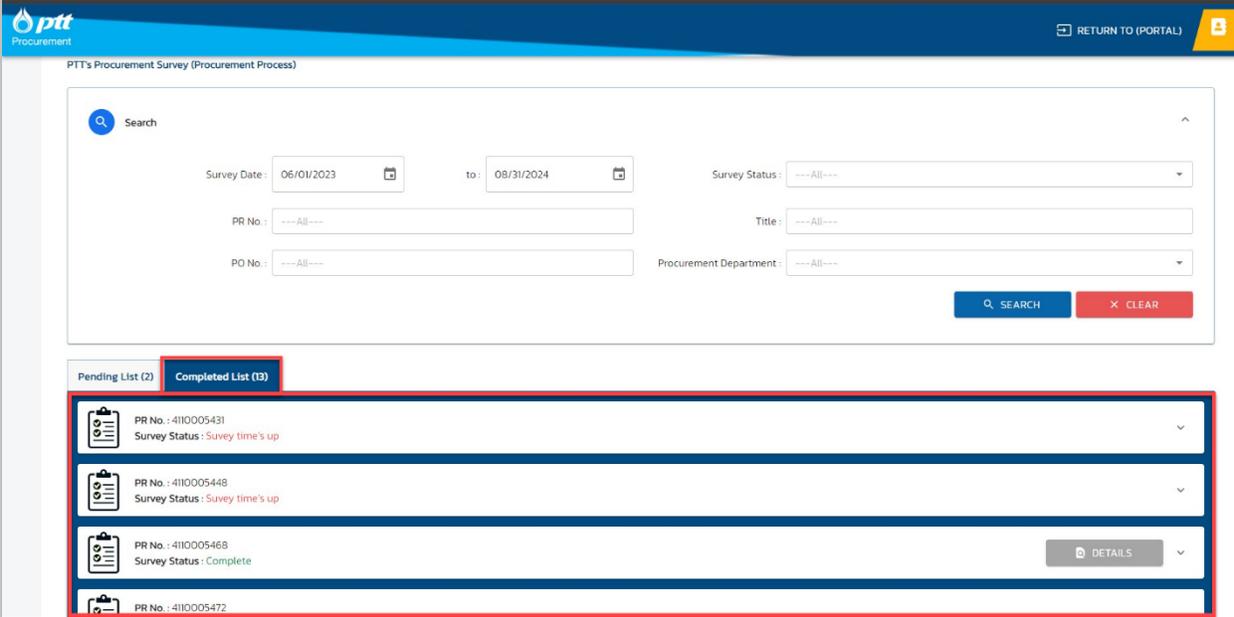If you have any more recommendations As seen in the picture, more feedback fields can be supplied.

▰*Example of PTT's Procurement Surveys (Procurement Process)*

Note: The language shown by vendors can be changed in the top right corner of the screen

The completed assessment form will appear on the Completed Items page with the statuses "Complete" and "Survey time's up," as shown in the picture.

▰*Example of screen display completed list survey*

You can click the button **DETAILS** to view a survey that has already been completed as shown in the picture

■ *Example of a screen display detailing PTT's Procurement Surveys (Procurement Process)*

Note: The language shown by vendors can be changed in the top right corner of the screen **EN** **TH**

4. PTT's Procurement Survey (Contract Management)

Vendors shall feedback PTT's procurement process satisfaction by clicking on the menu "PTT's Procurement Survey (Contract Management)"

The icon 🔔 displaying a number indicates pending surveys awaiting your feedback.
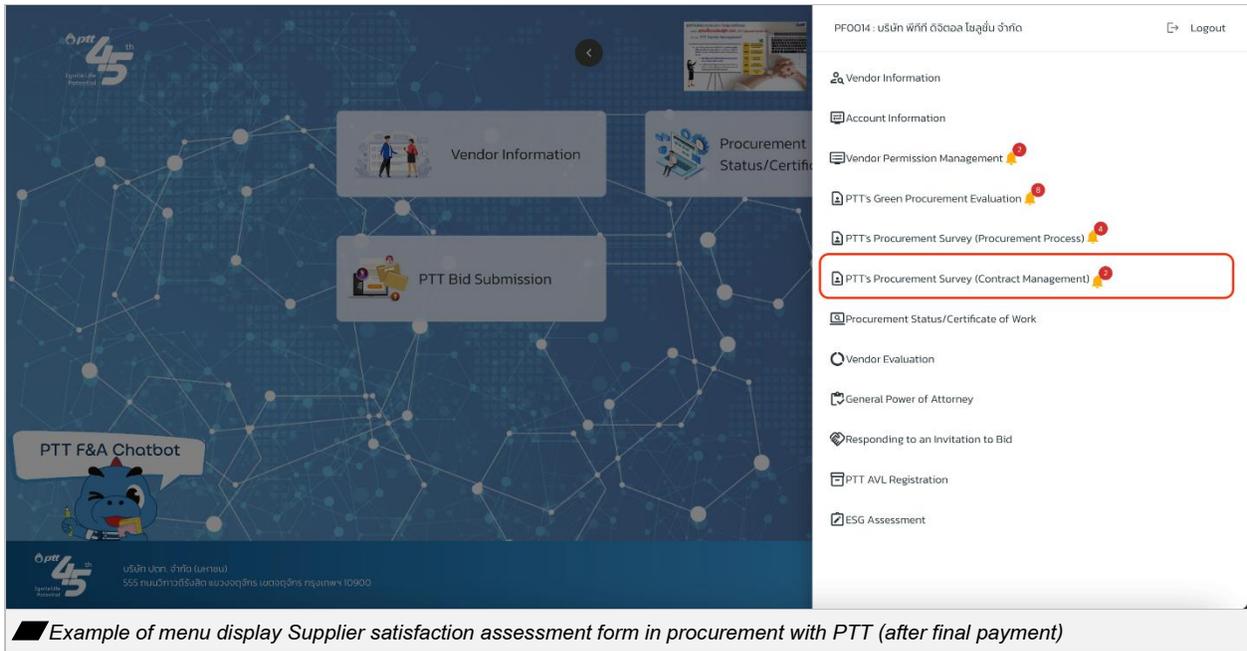
Example of menu display Supplier satisfaction assessment form in procurement with PTT (after final payment)

Vendors can fill in certain information to search for pending and completed PTT's Procurement Survey (Contract Management). The system will display your survey by default, with the date set to the past 3 month
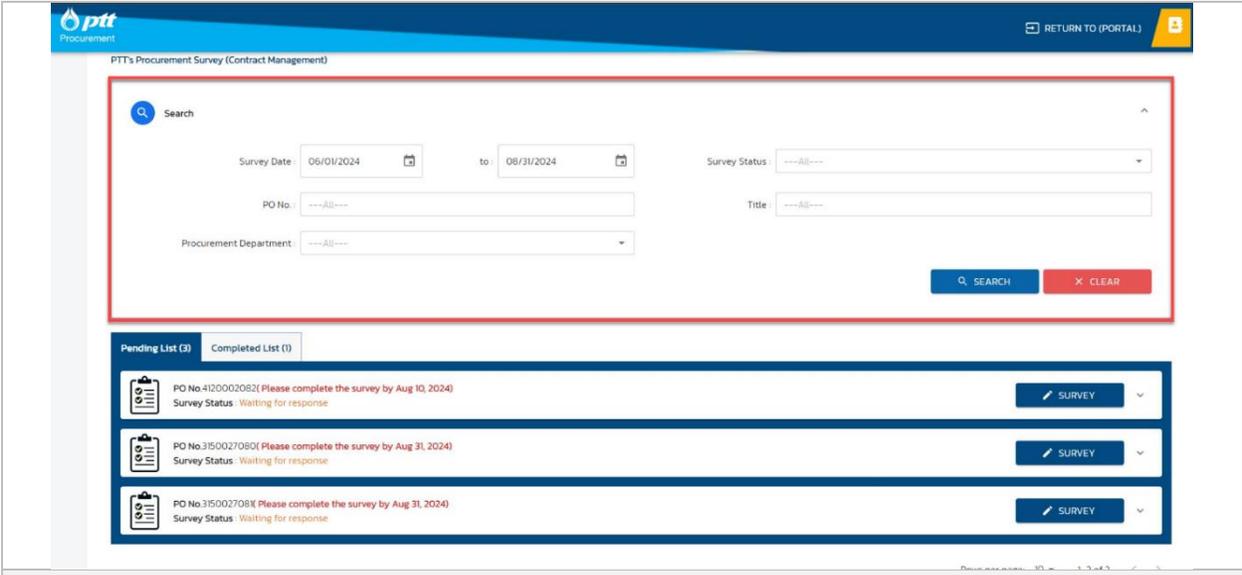
■ *Example of a search screen for PTT's Procurement Surveys (Contract Management)*

Show search details

Field	Description
Survey Date	Enter th period date
Survey Status	There are 3 survey statuses: 1. waiting for response 2. Complete 3. Survey time's up
PO No.	Enter PR number
Title	Enter Project Name
Procurement Department	Enter PO number
Q SEARCH	Select a procurement department
× CLEAR	Press the search button, the system will display information according to the conditions specified on the screen.

Vendor shall complete the survey showing on the pending list. After the vendor completes the survey, the system will display them on the completed list.

Example of assessment display screen at Pending List tab

When the vendor presses the button, **SURVEY** to finish the evaluation, the system displays the PTT's Procurement Survey (Contract Management)

Example of procurement satisfaction questionnaire screen with PTT

If you have any more recommendations As seen in the picture, more feedback fields can be provided.

Example of procurement satisfaction questionnaire screen with PTT

Note: The language shown by vendors can be changed in the top right corner of the screen.

The completed assessment form will appear on the Completed Items page with the statuses "Complete" and "Survey time's up," as shown in the picture.

Example of screen display completed list survey

You can click the button, **DETAILS** to view a survey that has already been completed as shown in the completed, as shown in the picture.

Example of a screen showing completed assessments

Note: The language shown by vendors can be changed in the top right corner of the screen.

5. PTT's Green Procurement Evaluation

PTT Green Procurement form will display an icon notice, the number of assessments waiting to be reviewed by Vendor, as shown in the picture,
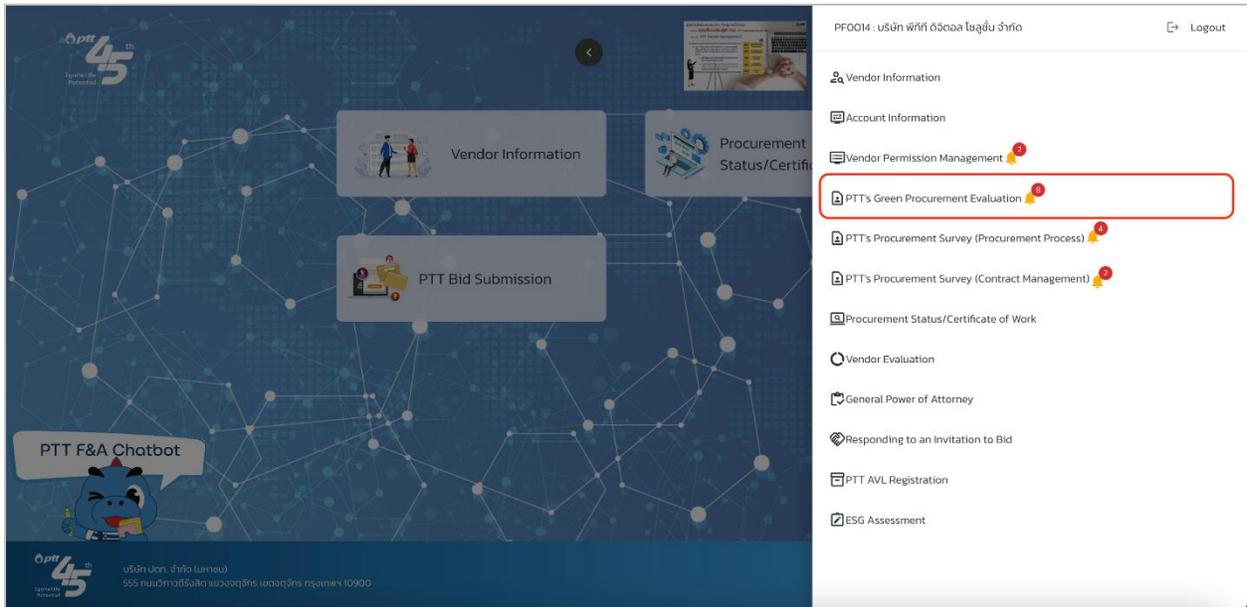
■ *Example of menu display PTT Green Procurement form*

The display is shown pending list that waiting to be reviewed and evaluated by Vendor
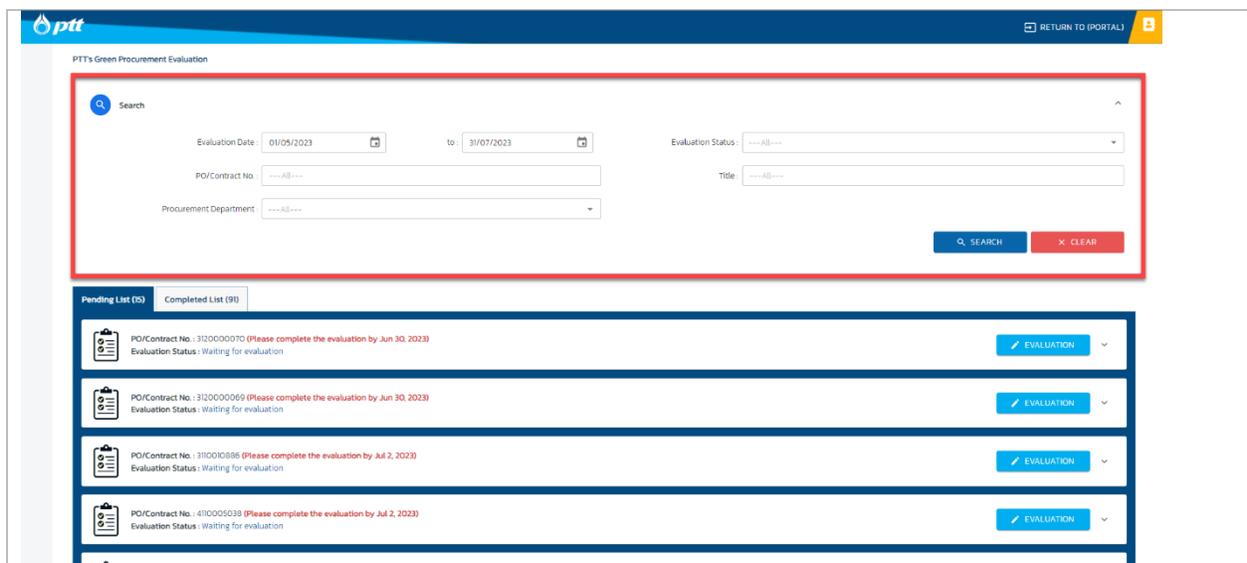
■ *Example of menu display PTT Green Procurement form*

Show search details

Field	Description
Evaluation Date	Specify the start date for submitting the assessment. The system will default the assessment submission date for 3 months, including the current month.
To	Specify the end date to submit the assessment. The system will default the date of submission of the assessment form for 3 months, including the current month.
Evaluation Status	There are 4 assessment statuses: • Wait for the vendor to answer the assessment. • The vendor has answered the assessment. • End of assessment time • vendors do not have E-mail
PO/Contract No.	Enter PO number
Title	Enter Job title
Procurement Department	Select Procurement Department
Q SEARCH	Press the search button, the system will display information according to the conditions specified on the screen.
× CLEAR	Press the clear button, the system will reset the above information.
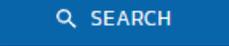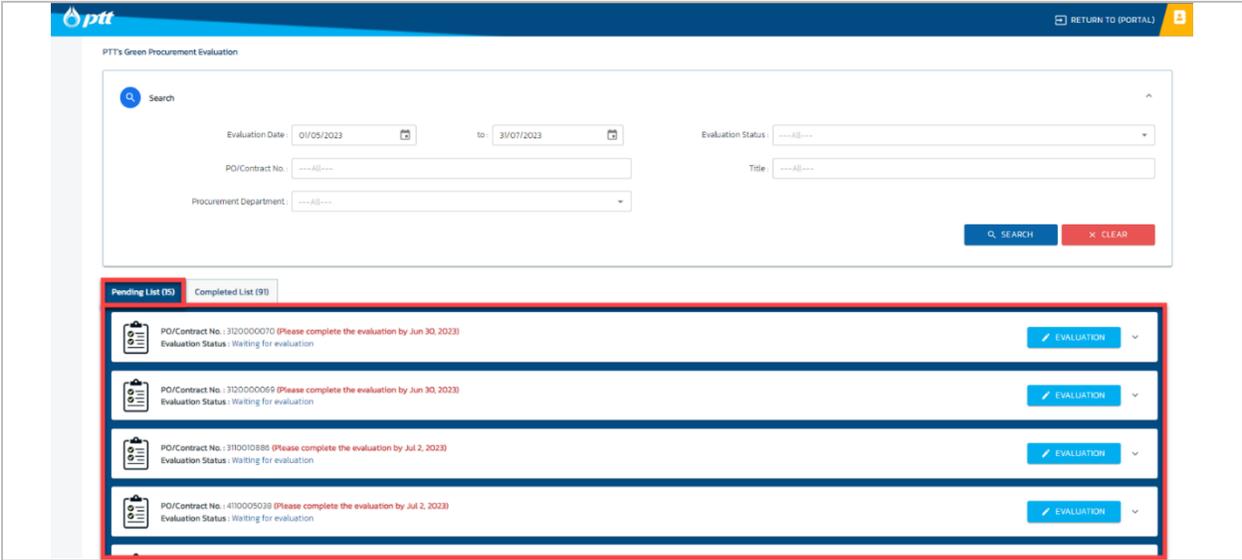
◣*Example of assessment display screen at Pending List tab*

Vendor can evaluate by clicks the button ✏ EVALUATION . Then system will display the questionnaire. Here, vendor can fill up the questionnaire completely and attach any supporting documentation by button 📄 Answer the assessment , as picture below.

◢◣ *Example of procurement questionnaire screen*

Note: The language shown can change in the top right corner of the screen TH EN

The completed questionnaire will appear on the Completed Items page as shown in the picture.
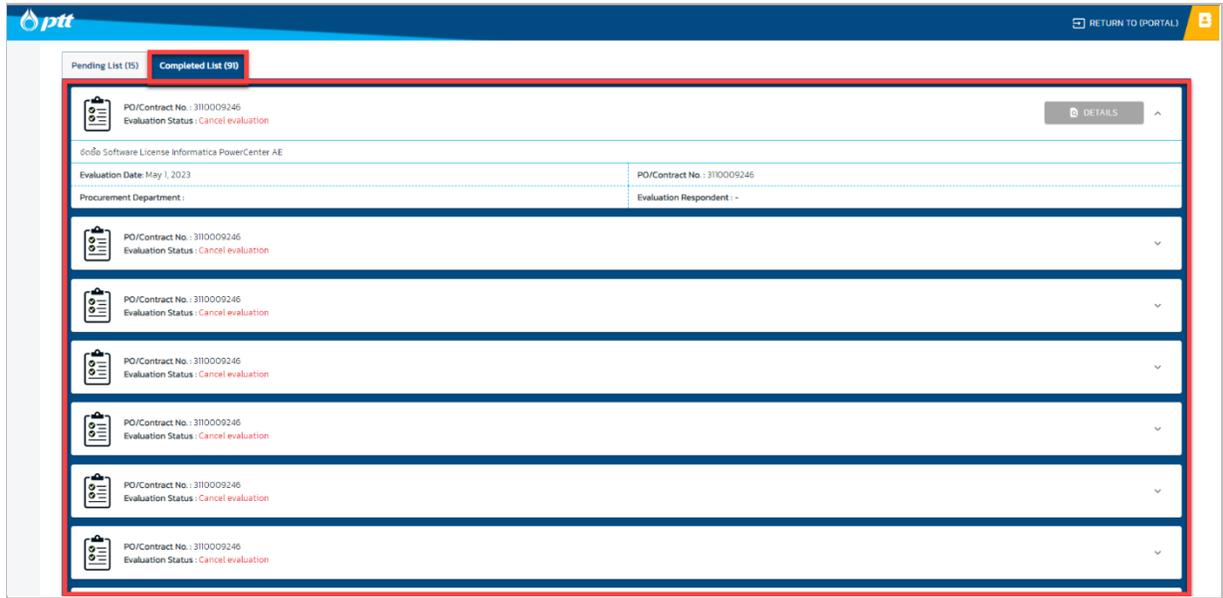
Example of assessment display screen Completed Items tab

Vendor can click the button, [🗄 DETAILS] to review a completely questionnaire.
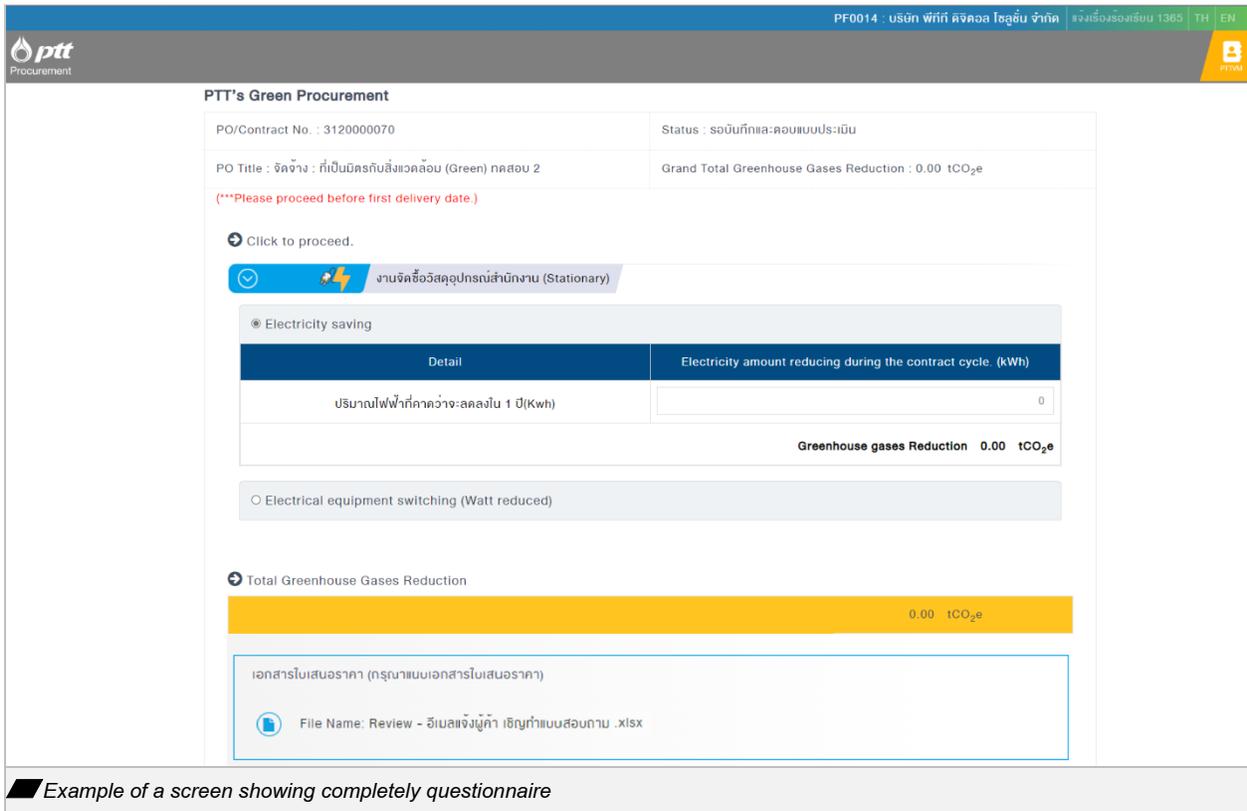
Example of a screen showing completely questionnaire

Note: The language shown can change in the top right corner of the screen [TH EN]

6. Procurement Status

Vendors may review the procurement status within the PTTVM system to validate the contract management process once they have completed their deliverables and submitted an invoice to PTTPLC.

Please click on the 'Procurement Status/Certificate of Work' box to access the system when the main menu boxes of the PTTVM web portal appear on the screen.

◢◣ *Example of PTTVM Web Portal*

The page will display three tab options in this menu. To view further information, select the "History of Certificate of Work Requests" tab.

◼ Example of the screen showing the History of Certificate of Work Requests menu
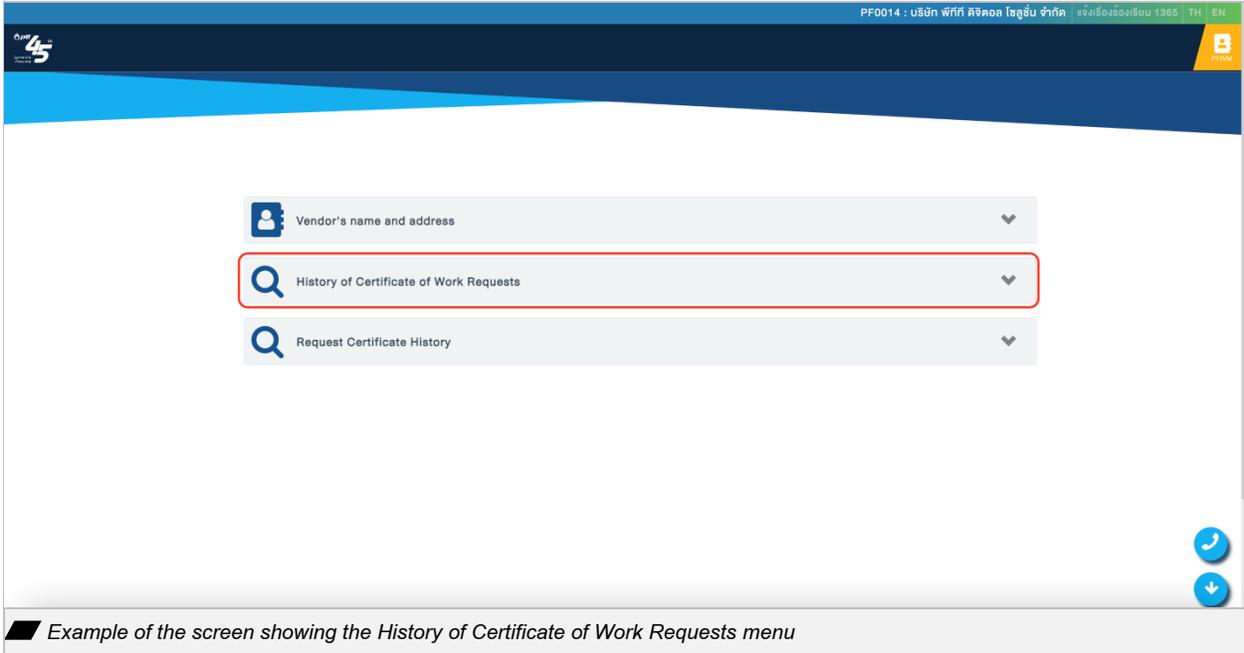
To view the contract details, click the dropdown ⌄ on the History of Certificate of Work Requests tab and fill out the required field and press the button Q Search .

◼ Search details screen
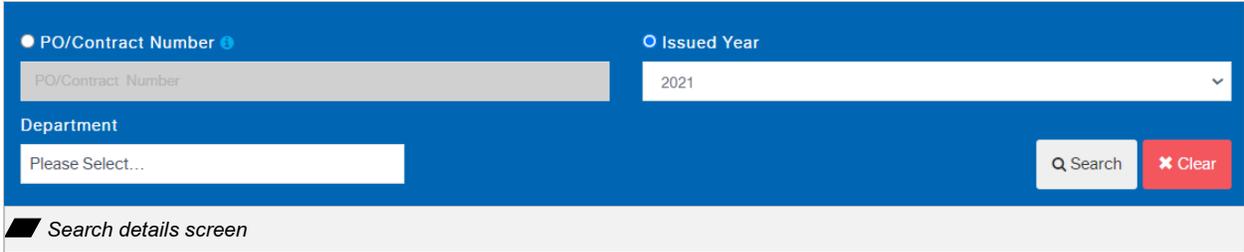
Field	Description
PO/Contract Number	Specify a PO number, contract number, or Letter of Intent beginning with 31, 41, and 51.
Issued Year	Spicify the year of PO, Contract, or Letter of Intent was signed.
Department	Specify the procurement department, which can include one or more departments

The tab will expand to display a summary of PO/Contract information. Vendors can access additional details and view the current status by clicking the button Q Check Payment associated with each PO/Contract.

PO/Contract information details
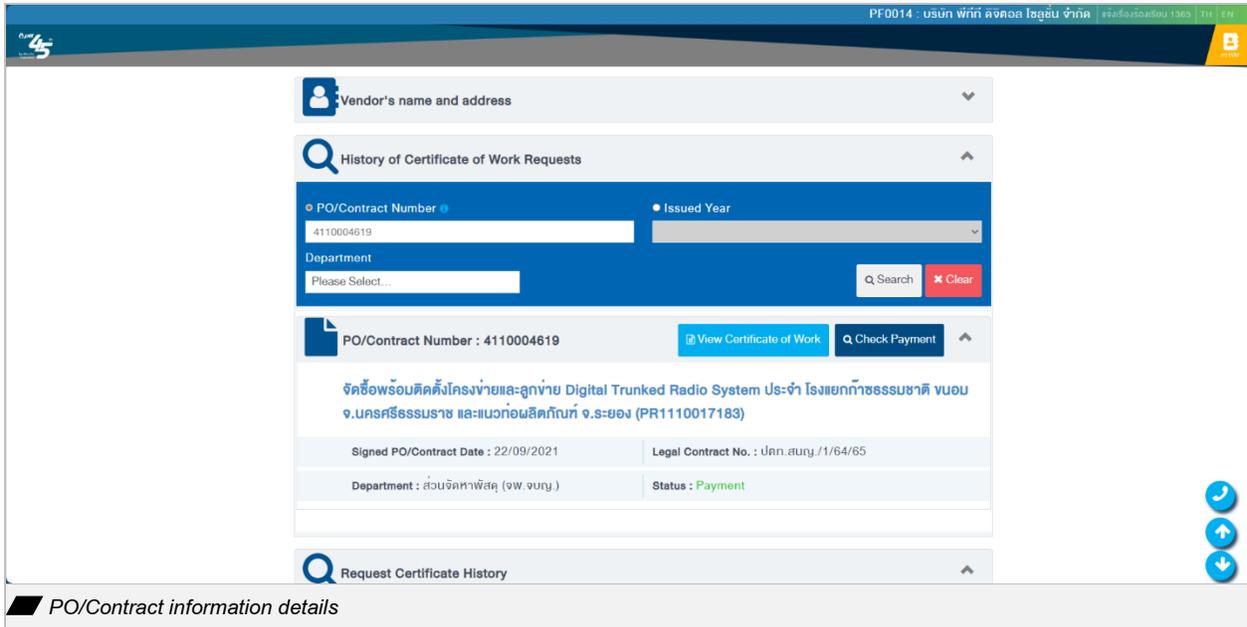
When the popup window appears on the screen, click the dropdown ⌄ to access further details regarding each delivery note and invoice. The information will then present the five steps of the procurement process as follows:

- Contract Management

- Goods Receipt

- Invoice Verification

- Payment Approval

- Payment Details

Example : PO/Contract Details screen

Field	Description
Document Date	Shows the date issued on delivery note/invoice document
Status	Shows the status of invoice verification in the procurement process: 1. Contract Management = This status indicates that the vendor has signed the PO/Contract and is currently in the working process. 2. Goods Receipt = This status signifies that the vendor has fulfilled their deliverables and submitted an invoice to PTTPLC. The committee is conducting an inspection. 3. Invoice Verification = This status indicates that the invoice is currently in the process of verification. 4. Payment Approval = This status indicates that the financial staff is presently in the process of approving the invoice payment. 5. Payment Completed = This status indicates that PTTPLC has already made the payment.

Field	Description
	The status icon shows the process in three colors representing different stages of completion: 🟢 Green = Completed 🟡 Yellow = In progress ⚪ Grey = Incomplete
Vendor Evaluation	Shows the results of vendor evaluation for each installment. Additionally, it might show the assessor's comments/feedback for improvement. • Overall Score: A (Excellent), B (Good), C (Fair), D (Poor) • SSHE Score: A (Excellent), B (Good), C (Fair), D (Poor)

Payment Methods

1) Payment method: Transfer

➲ General Information

Payment Details	
Good Receipt Date	05/08/2022
Payment Date	24/08/2022
Payment Method	Bank Transfer : ธ.ยูโอบี, สาขา Bank Account No. : XXX-X-XX001-0 Transfer Date : 24/08/2022 Amount 17,636,584.00 Baht. Contract / PO / Invoice No. : • Contract No. 4110004619;PO 3210015115;07100001 • Contract No. 4110004619;PO 3210015115;07100002 • Contract No. 4110004619;PO 3210015115;07100003 • Contract No. 4110004619;PO 3210015115;07100004 *Should you have queries, please do not hesitate to contact us F&A Service Center Tel. 0-2537-3700
Fine / Penalty / Others	-

◤ *A screen example shows transfer payment method information*

Vendors can access more information depending on the payment methods by clicking on the status icons: **'Invoice Verification'** and **'Payment Approval'**.

• Status : **Invoice Verification**

- Invoice documents are verifying.

- Incorrect or incomplete invoice documents have been returned to the procurement department/the vendor for correction.

- Waiting for additional documents from the procurement department/the vendor.

Invoice Verification details screen

- Status : **Payment Approval**
  - Payment approval is in progress.
  - Payment is approved.

Payment Approval details screen

2) <u>Payment Method : Cheque</u>

➲ General Information

Payment Details	
Good Receipt Date	22/06/2022
Payment Date	22/07/2022
Payment Method	Accepting cheque at the bank : ธ.ไทยพาณิชย์, อาคารชินทาวเวอร์ ถ.วิภาวดี Cheque No. : 12875093 Cheque Date : 22/07/2022 Amount 6,032,000.00 Baht. Contract / PO / Invoice No. • Contract No. 4110004940;PO 3210014753;INHQ22040002 *Should you have queries, please do not hesitate to contact us F&A Service Center Tel. 0-2537-3700
Fine / Penalty / Others	–

Example of a screen shows cheque payment method information

Vendors can access more information depending on the payment methods by clicking on the status icons: 'Invoice Verification', 'Payment Approval' and 'Patment Completed'.

- Status : Invoice Verification

    - Invoice documents are verifying.

    - Incorrect or incomplete invoice documents have been returned to the procurement department/the vendor for correction.

    - Waiting for additional documents from the procurement department/the vendor.

Invoice Verification details screen
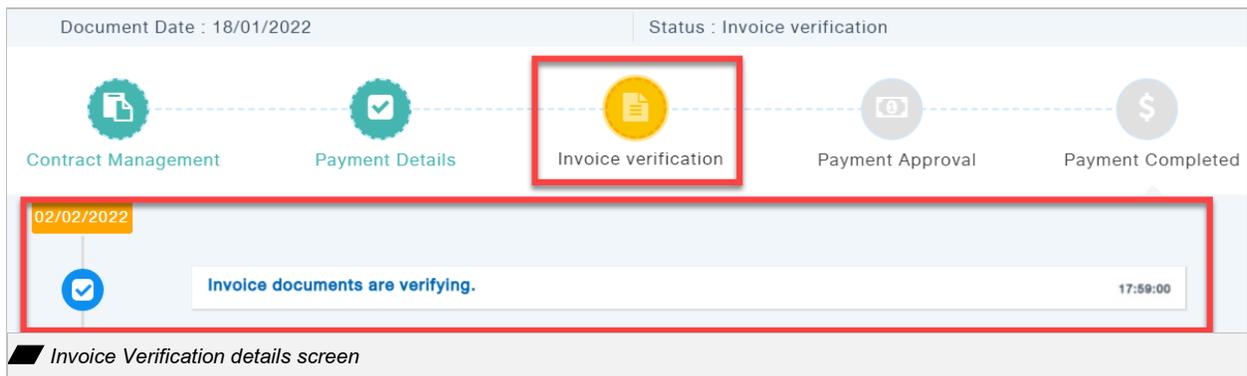
- Status : Payment Approval

    - Payment approval is in progress.

    - Payment is approved.

    - Payment has been successfully completed

Payment Approval details screen
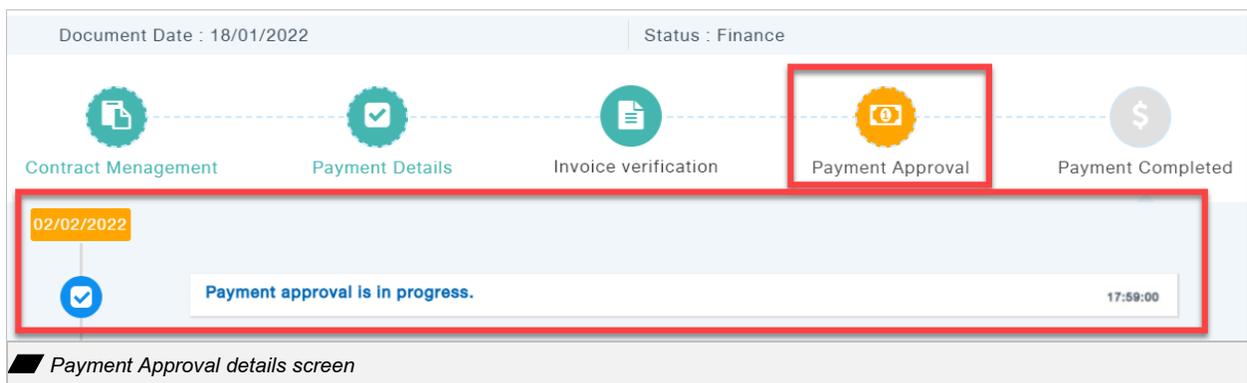
- Status : Payment Completed

    - The cheque has been issued and is ready for pickup.

- The cheque has been deposited into the bank account and is awaiting clearance.

- The cheque has been fully cleared and payment has been made.

Completed Payment details screen

7. PTT F&A Chatbot

Vendors can use PTT F&A Chatbot to check about the process of invoice verification and payment details, specifying information according to the conditions set by the F&A Chatbot.

The PTT F&A Chatbot Function appears in the lower left corner of the screen on the PTTVM web portal; click on it to access the function. See the manual at this link: Manual F&A Chatbot for more information.

▰ *PTTVM web portal scrren and PTT F&A Chatbot Function*

▰ *PTT F&A Chatbot*
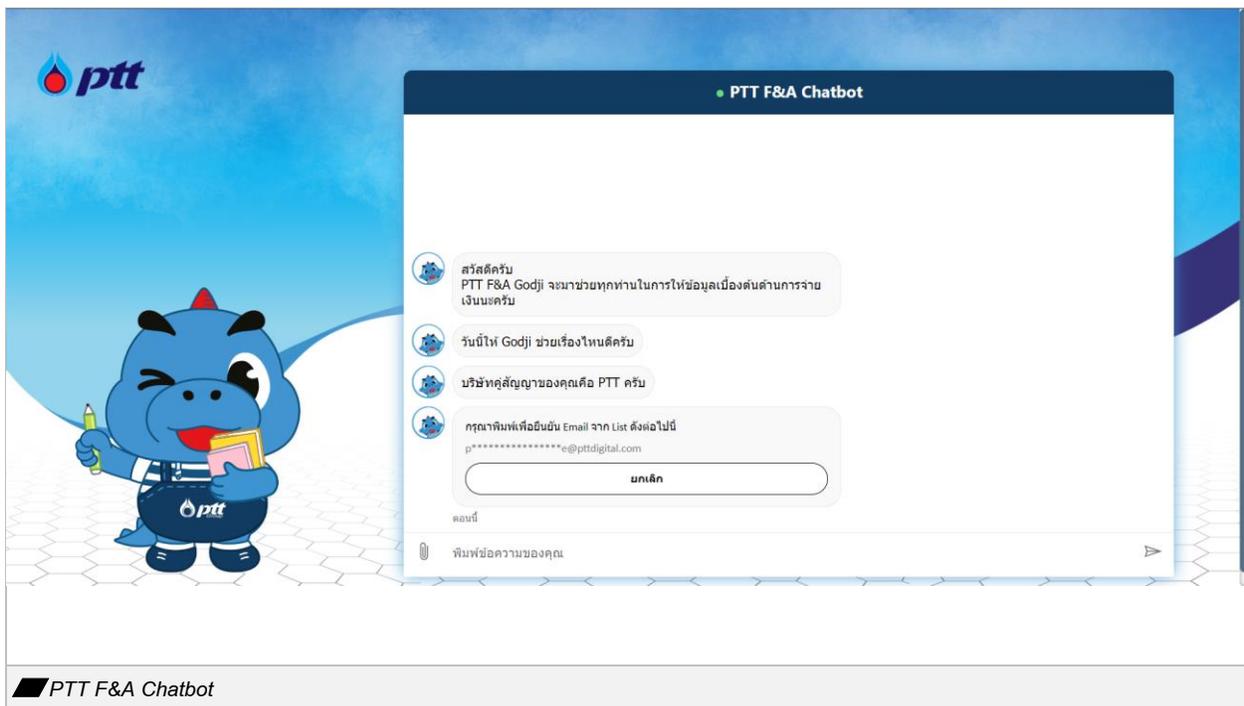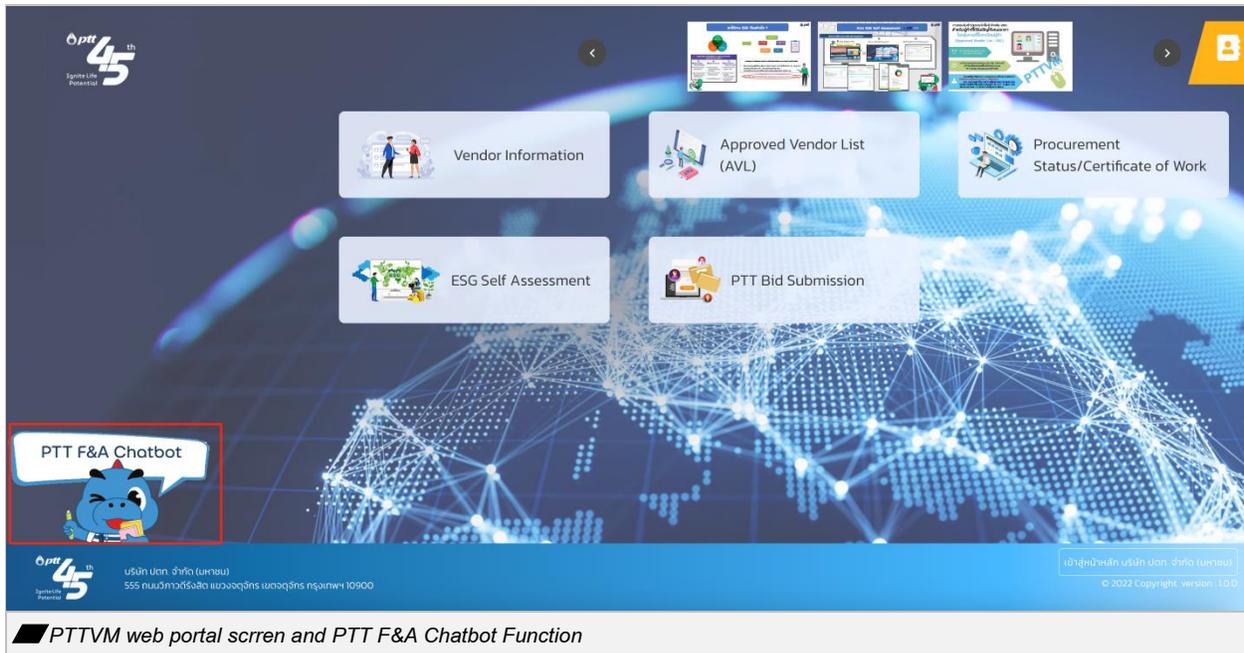
8. Vendor Evaluation

      Vendors can use the PTTVM system to review their performance and feedback.To get started, go PTTVM and select the 'Vendor Evaluation' menu.

◣ *PTTVM Web Portal and PTTVM Menu*
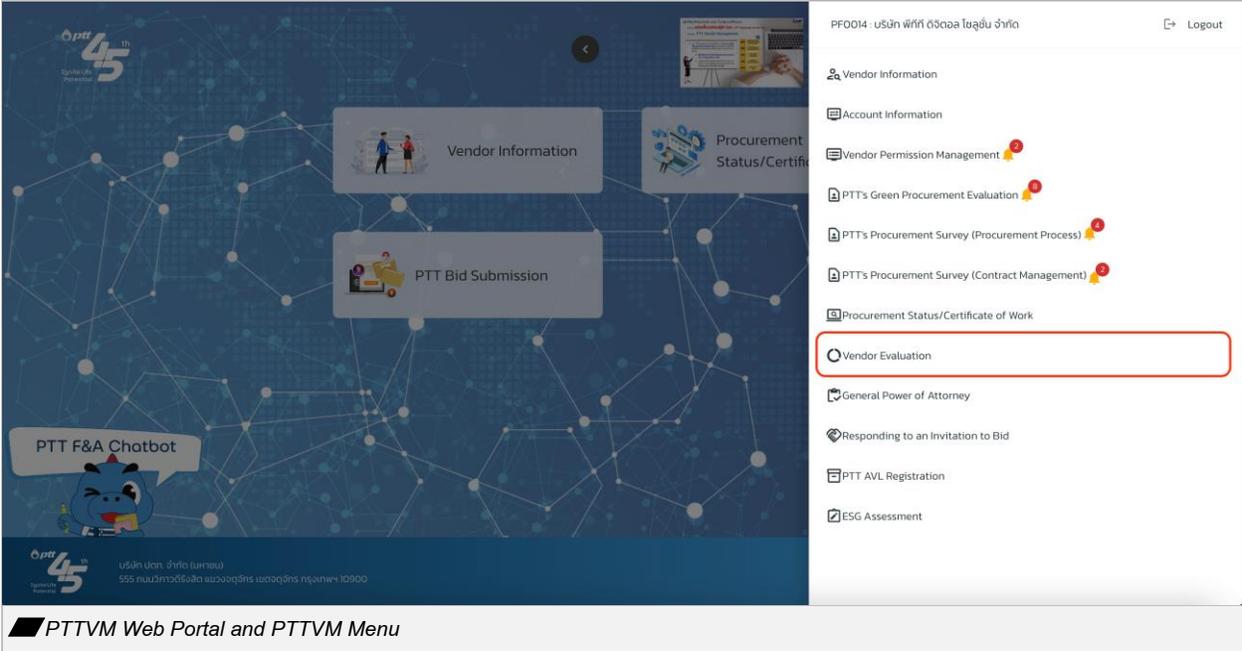
      this menudisplays general information and a search area. Vendors must complete the required fields to search for their evaluation results.
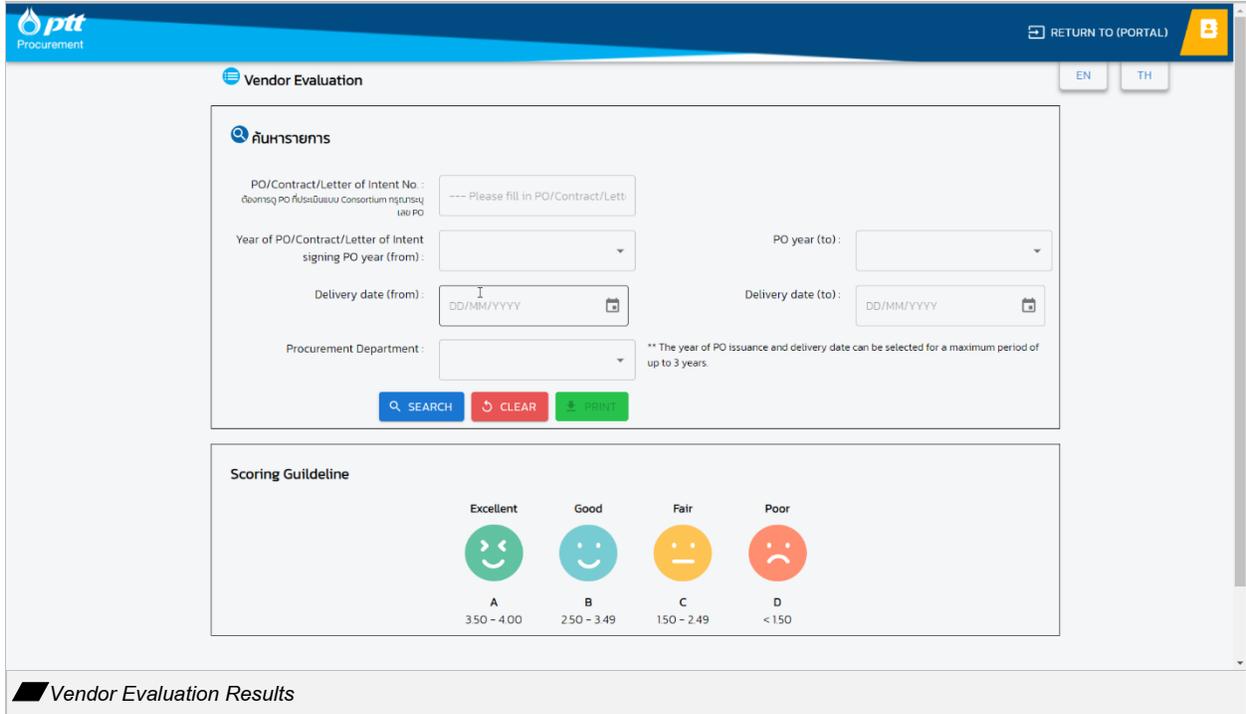
Vendor Evaluation Results

The screen will display the overall evaluation for all project procurement and each individualprocurement project. Vendors can click the button to view more detailed evaluations for each individual procurement project.

- Overall Score: A (Excellent), B (Good), C (Fair), D (Poor)
- SSHE Score: A (Excellent), B (Good), C (Fair), D (Poor)

Example of a task evaluation screen

Example of a task evaluation screen

The vendor can click the button ⬇ PRINT on the vendor performance evaluation results page to export the "Performance Evaluation Details," as shown in the image.

ptt
Vendor Management

รายละเอียดผลการประเมินการปฏิบัติงาน
รหัสผู้ค้า :
ชื่อผู้ค้า : บริษัท จำกัด

เรื่อง : จัดซื้อ Cable Gland เพื่อบำรุงรักษา Positioner พื้นที่โรงแยกก๊ซธรรมชาติห น่วยที่ 3
รายการส่งมอบ: งวดที่ 1
เลขที่PO/สัญญา/หนังสือสนอง : 31
อ้างอิงข้อตกลงเลขที่ : 31
เลขที่ใบส่งของ/ใบแจ้งหนี้: 50
MR No. : 67
วันที่ประเมิน: 2024-05-22
ผู้ประเมิน:

ผลการประเมินภาพรวม | ผลการประเมินด้าน SSHE

ผลการประเมิน   (พอใช้)   (ดีมาก)

รายละเอียดผลการประเมินภาพรวม

หัวข้อการประเมิน	คะแนนเต็ม	คะแนนที่ได้	ผลการประเมิน
1. ด้านคุณภาพ (Quality)			
1.1 คุณภาพของสินค้า/บริการและ ความถูกต้อง ครบถ้วนในการส่งมอบ	4	2	เป็นไปตามข้อกำหนด โดยต้องทำการแก้ไขมากกว่า 1 ครั้ง หรือ ได้รับหนังสือแจ้งเตือน และไม่ส่งผลกระทบเสียหายต่อ ปตท.
2. ด้านการส่งมอบ (Delivery)			
2.1 ความตรงต่อเวลาในการส่งมอบ	4	1	ส่งมอบสินค้า/บริการล่าช้ากว่าวันที่กำหนดในเงื่อนไขและข้อ กำหนดของ ปตท.
3. การให้บริการ (Service)			
3.1 การตอบสนองในการประสานงาน	4	2	ให้ความร่วมมือตามสมควร ตอบสนองต่อลูกค้าตามสมควร เป็น ที่ยอมรับได้
4. ด้านการดำเนินงาน (Performance)			
4.1 ความรอบคอบในการดำเนินงาน	4	2	ยังไม่ค่อยเห็นถึงความละเอียดรอบคอบในการทำงานที่เด่นชัด ขาดตกบกพร่องบ้าง แต่แก้ไขผ่านไปได้ พอยอมรับได้
4.2 ความรู้และความเชี่ยวชาญเกี่ยวกับสินค้า/บริการ	4	2	ตอบข้อซักถามได้ตามสมควร บางประเด็นอาจต้องขอไปหาข้อมูล เพิ่มเติมมาให้
4.3 ความรับผิดชอบในการทำงาน	4	2	มีข้อบกพร่องในการทำงานบ้าง แต่มีเหตุผลที่ยอมรับได้
5. ด้านอื่น ๆ ตามลักษณะเฉพาะของงาน			

หากต้องการสอบถามข้อมูล
กรุณาติดต่อ 02-537-2510, 02-537-1601
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■ *Example of a PDF the vendor performance report screen.*

9. Certificate of Work

It is a page for vendors to use to request a certificate of work. You can request a certificate of work from the menu. **Procurement Status/Certificate of Work**

◢◤*Example of the Contract Status / Request Certificate of Work menu screen*

◢◤*Example of the Contract Status / Request Certificate of Work menu screen*
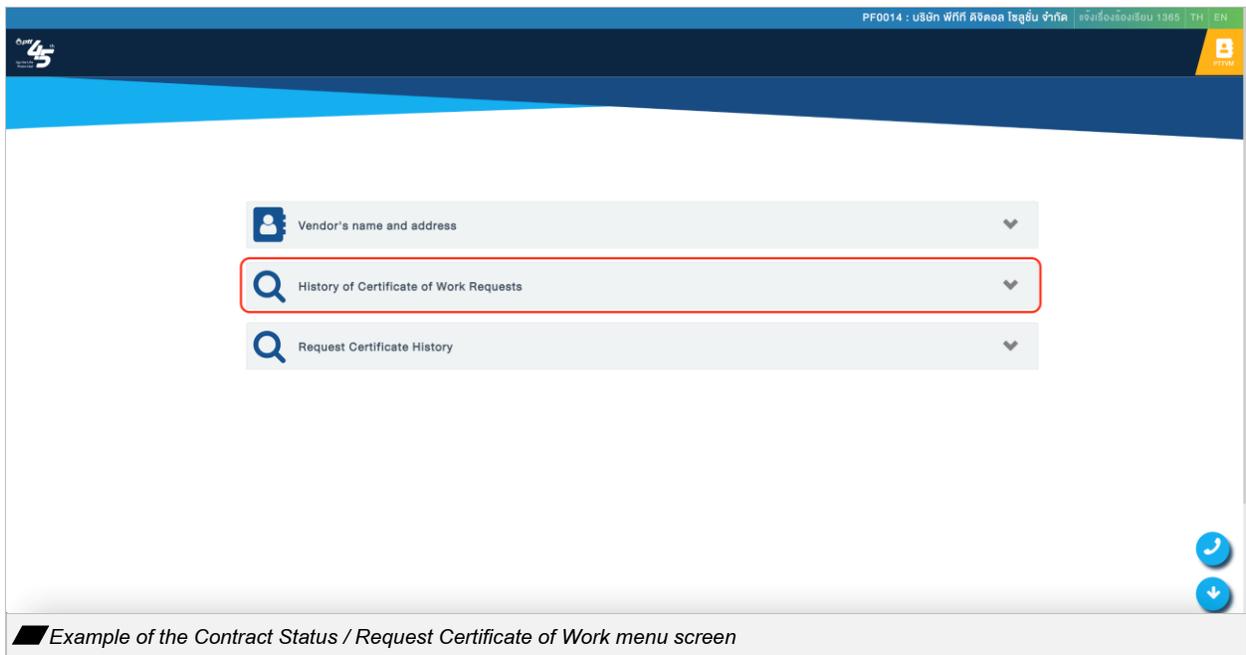
9.1 Request for Certificate of Work

Check the contract status/request certificate of work screen when you first access it. A list of all the contracts with the suppliers will be shown by the system. The list of contracts must already have been paid in order to seek a certificate of work and a button will appear. ⬛Request Certificate of Work

■Example of a certificate of work button screen

■Example of a certificate of entry request screen
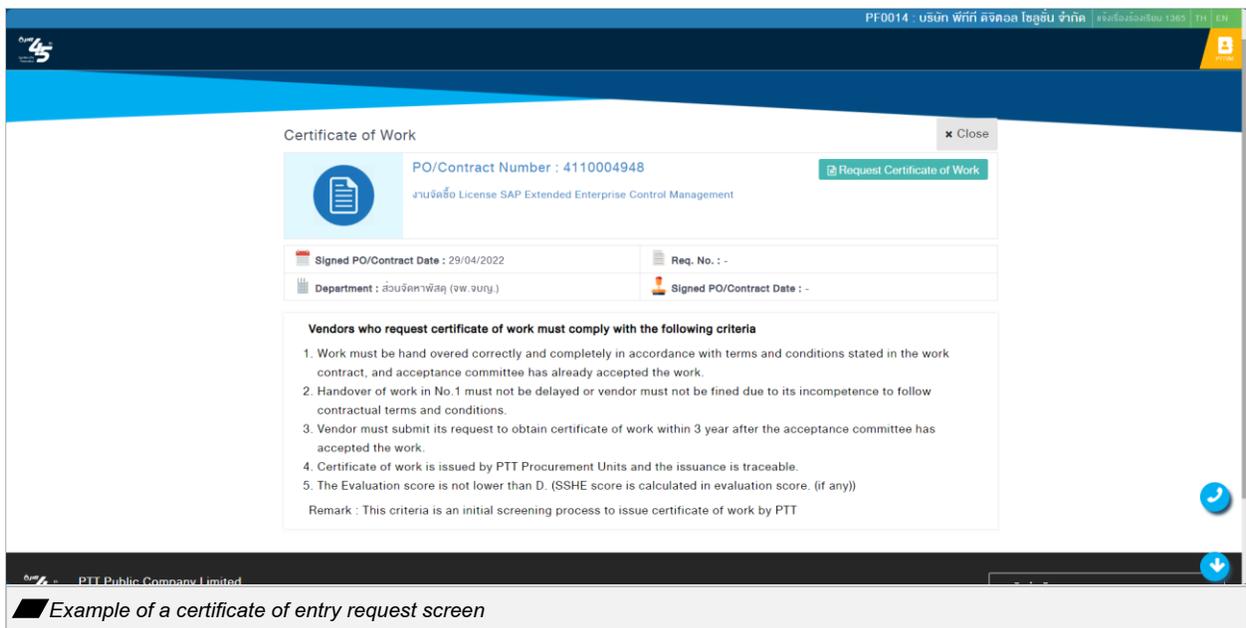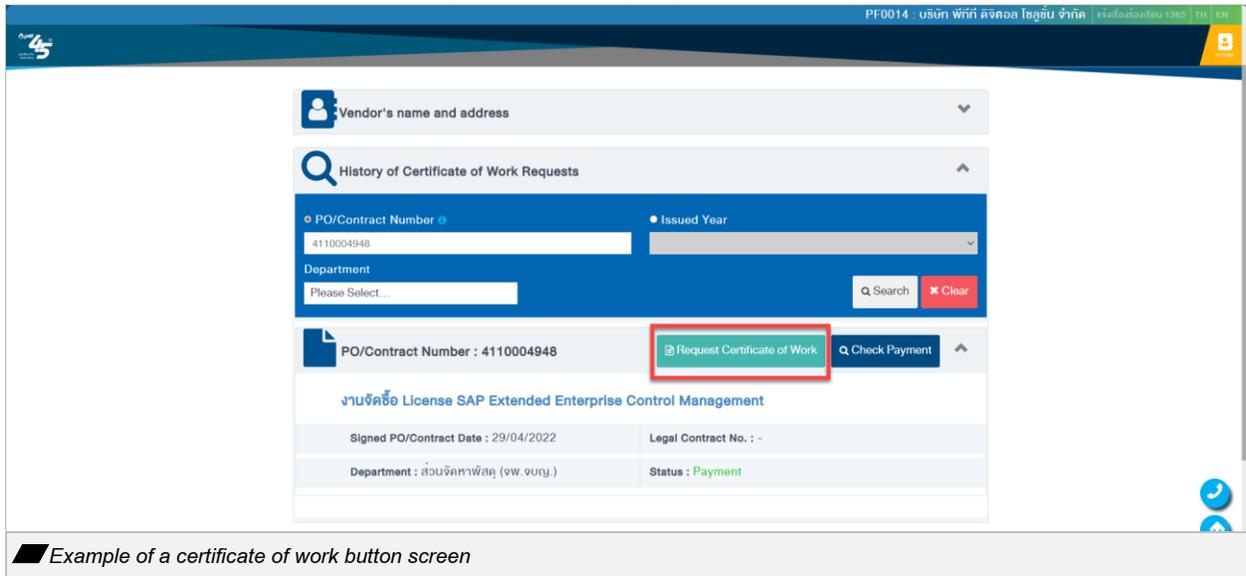
When you press the button, ⬛Request Certificate of Work a pop-up screen will appear to confirm the request for the button, a certificate of work.
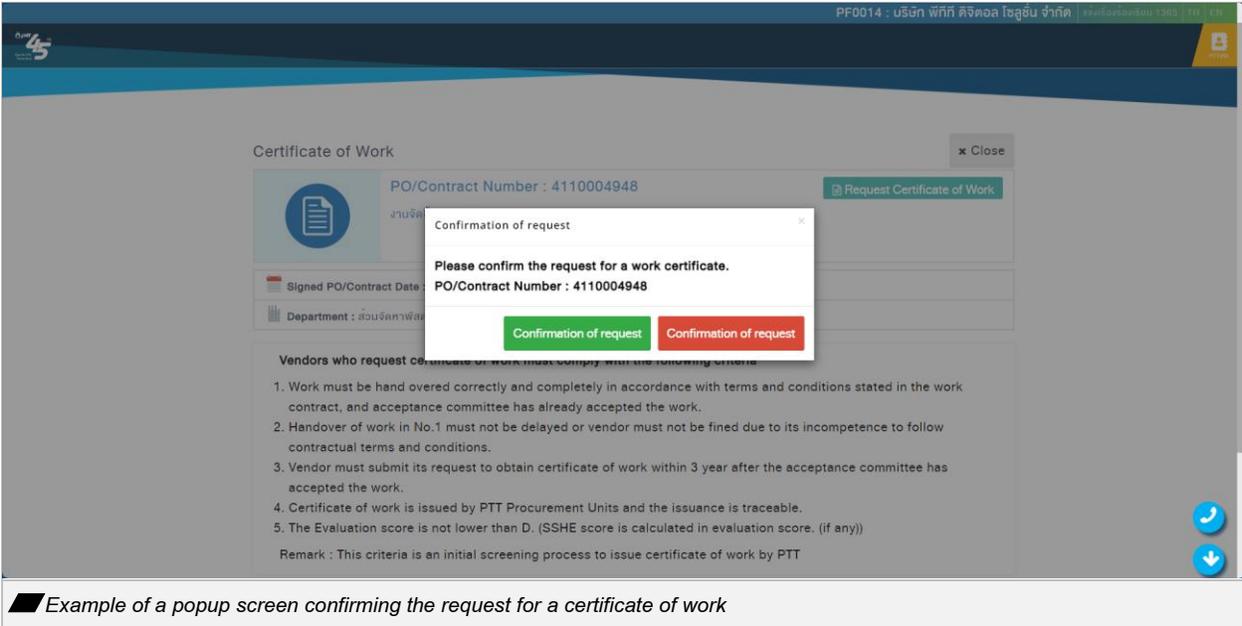
◤*Example of a popup screen confirming the request for a certificate of work*

Once the vendor confirms the application for the certificate of work. The system will send an e-mail to inform the vendor of the request for a certificate of work to verify and consider issuing a certificate of work to the vendor. An example is as shown in the picture.

■■■ Example of E-mail informing the vendor to request a certificate of work

Remark: If the status of the contract has already been paid. However, the system only displays a checkmark instead of the button to seek a certificate of work, and when this button is hit, a popup notice stating that the applicant does not satisfy the requirements for asking for a certificate of work will appear.

■ *Example of a contract status display*

■ *Example of a popup screen showing why the Request Certificate of Work button is not displayed*
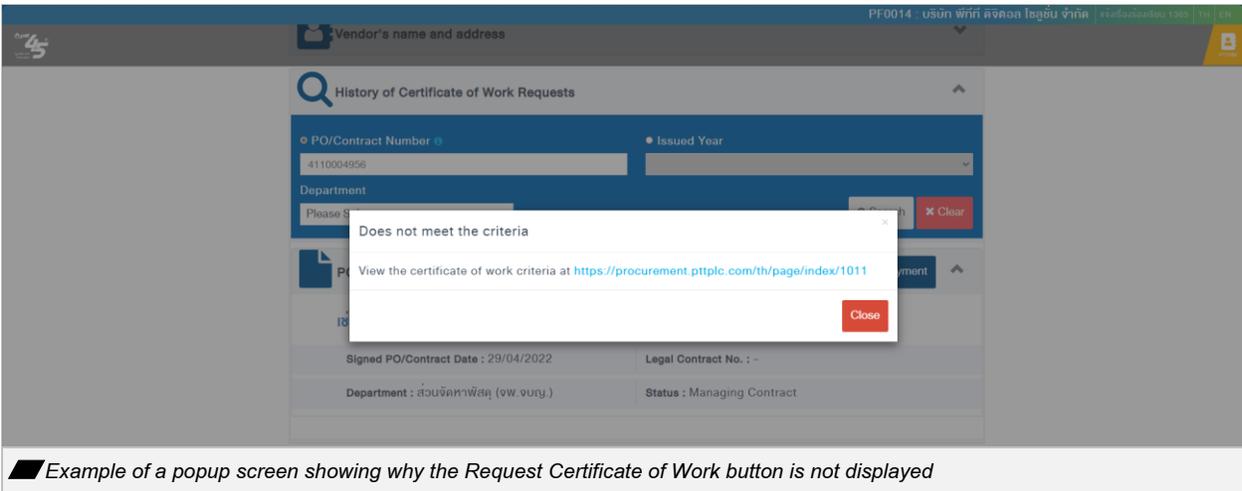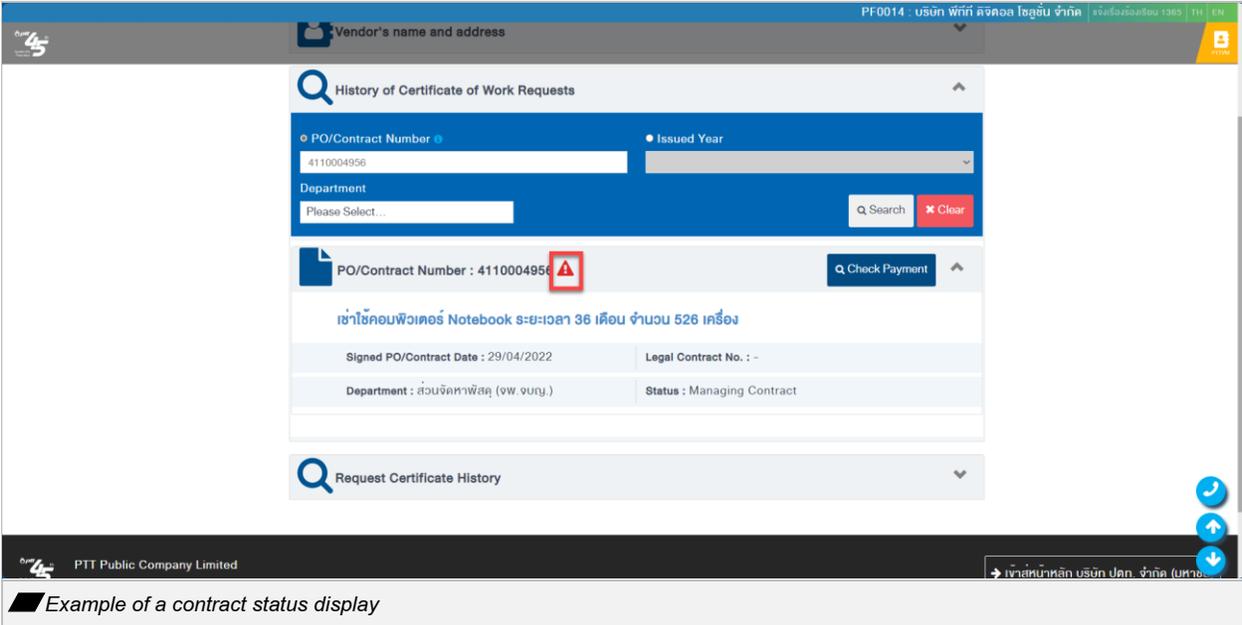
9.2 Tracking the status of the certificate of work request

After submitting a certificate of work request, the vendor can track the status of the request list as shown in the picture.
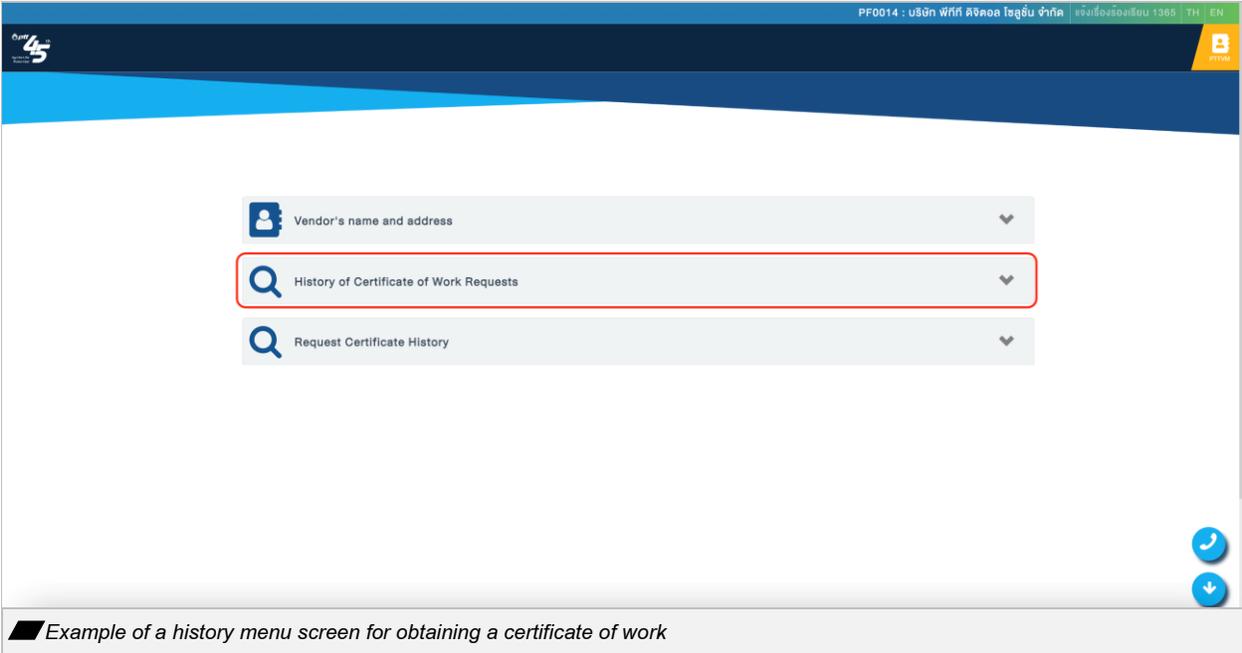
Example of a history menu screen for obtaining a certificate of work

This page that opens when you access the Certificate of Work History All of the vendor's contracts for which a certificate of work has been sought will be listed by the system. By tapping the button, [View Certificate of Work] contractors can examine the status of their certificate of work.
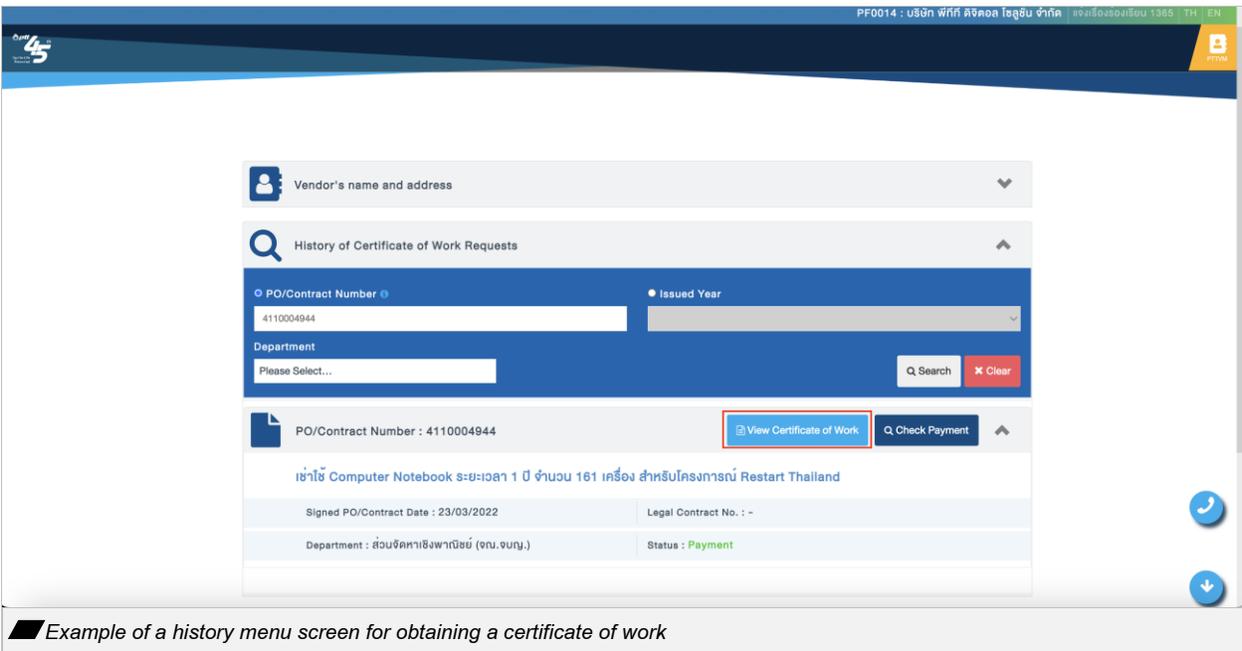
Example of a history menu screen for obtaining a certificate of work
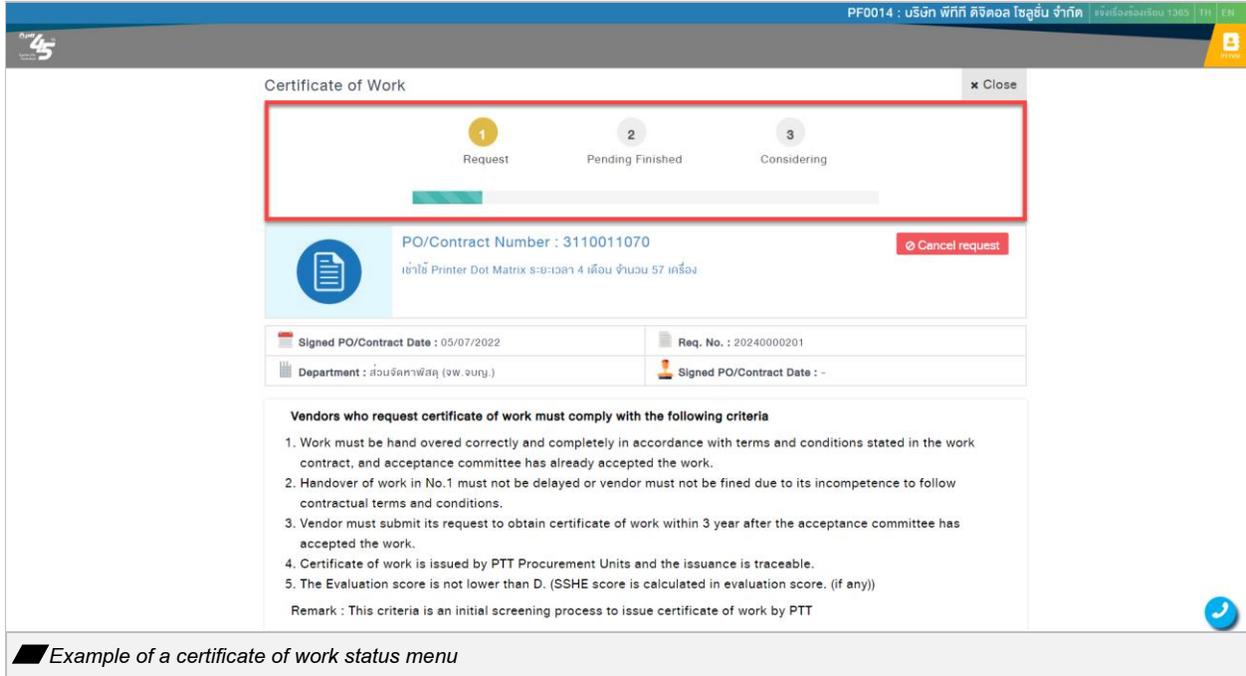
Example of a certificate of work status menu

Following are the steps:

Step 1 Status: Submit application denotes that the vendor has successfully used the system to submit an application for a certificate of work.

Step 2 Status: Under consideration denotes that PTT is examining the data and taking the creation of books into consideration.

Step 3 Status: When PTT considers granting a certificate of work, it has reached step 3. Download the system's certificate of work file or Think about not issuing a certificate of work, and let the vendor know reasons.

9.3 Download Certificate of Work

The vendor can download the book file after receiving an email confirming the acceptance of the issue of the certificate of work.The work can be assured to be exactly as it is in the picture.

Sample Screen Download Certificate of Work
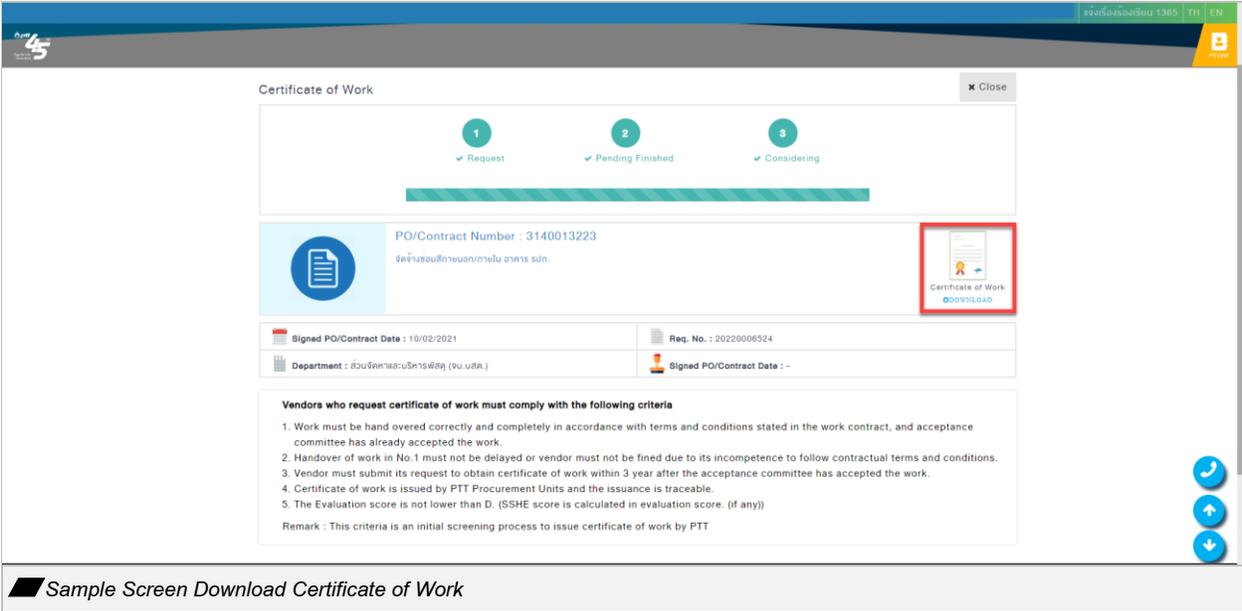
When you [Certificate of Work DOWNLOAD] button, a pop-up screen will appear to allow you to download the certificate of work.

Example of Popup Download Credential
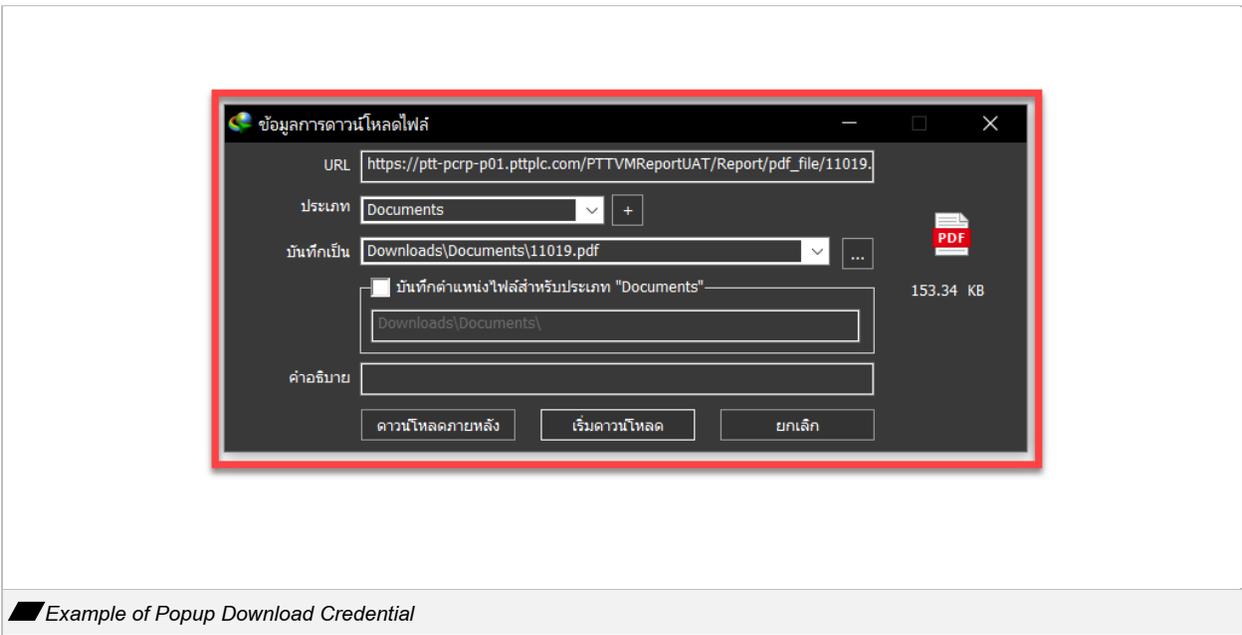
Remark: The system will instead display the message "The vendor has requested a certificate of work through the old system (before April 27, 2021)" if the vendor attempts to request a certificate of work through the PTTVM system but PTT has already prepared a paper certificate of work and delivered the original to the vendor. as described in the picture.
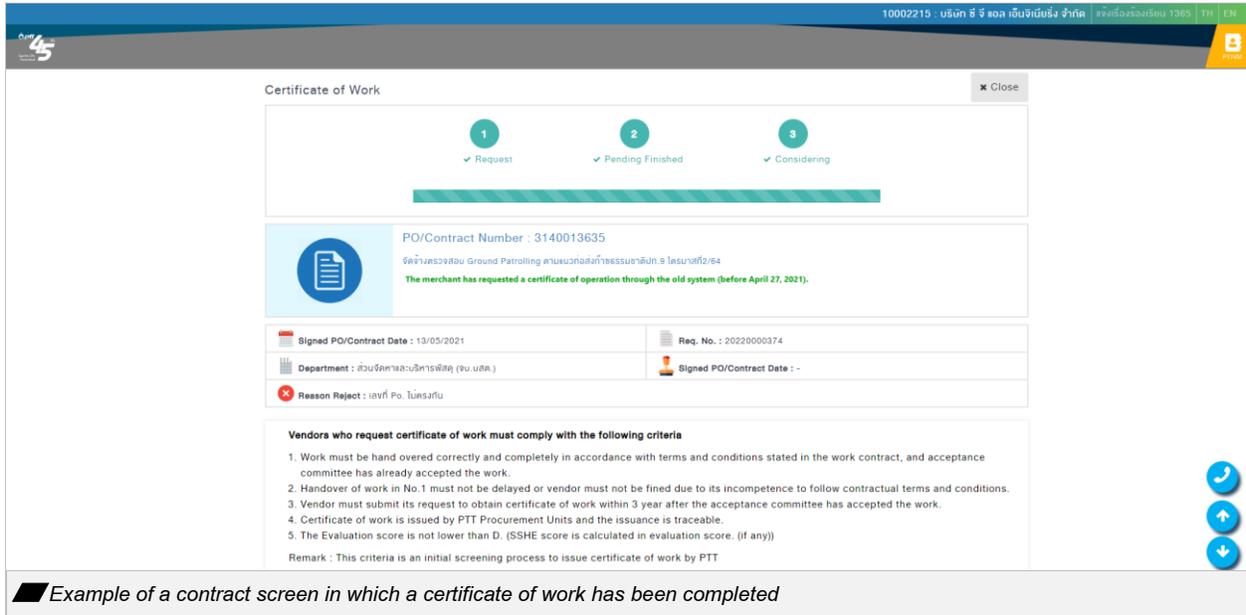
Example of a contract screen in which a certificate of work has been completed

## 9.4 Cancellation of the application for issuance of a certificate of work

Once the button is pressed and the certificate of work [View Certificate of Work] is confirmed, the system will display a button [⊘ Cancel request] so that the vendor can cancel the request for the issuance of the certificate of work.

9.4.1 In case of being in step 1 Status: Submit application
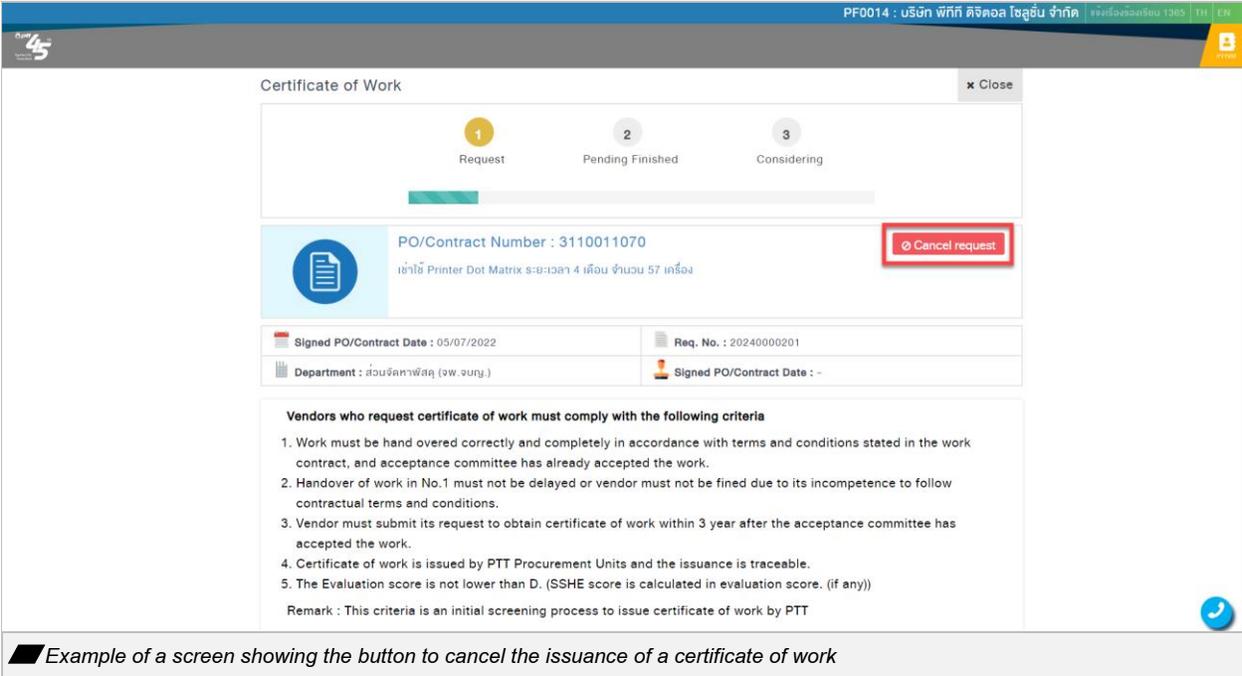
Example of a screen showing the button to cancel the issuance of a certificate of work

When the button is **⊘ Cancel request** , a pop-up screen will appear confirming the cancellation of pressed the certificate of work.
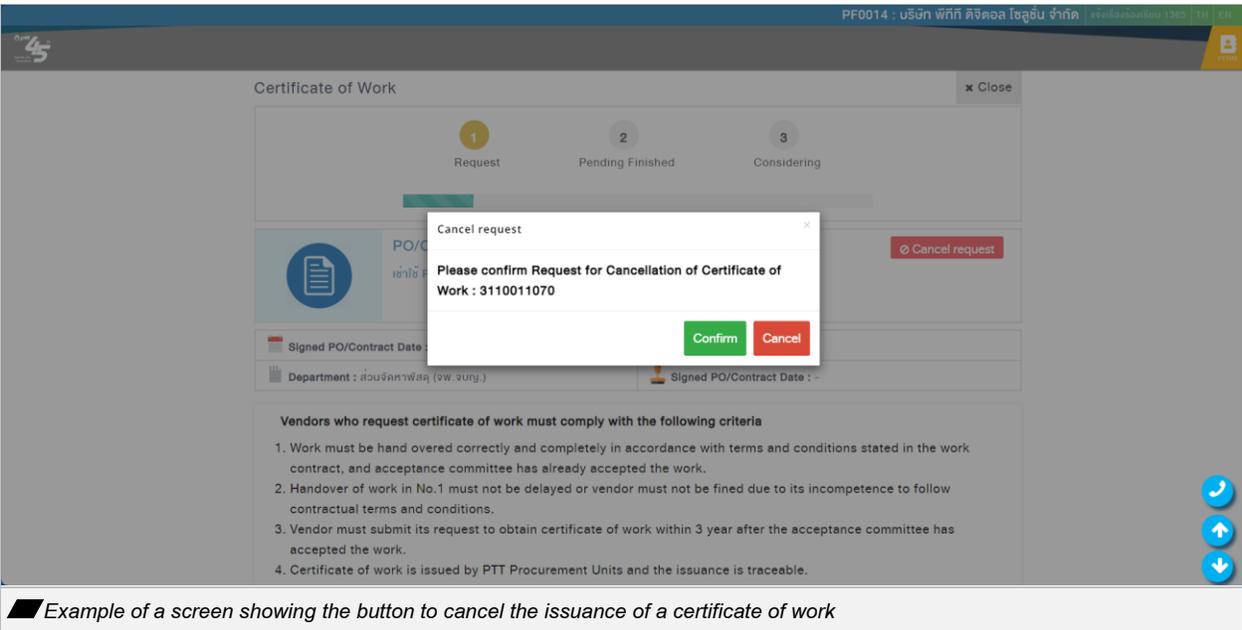
Example of a screen showing the button to cancel the issuance of a certificate of work

Upon confirming, the system will automatically cancel the issuance of the certificate of work and send an email acknowledging the cancellation request to the vendor

■Example of E-mail acknowledging the cancellation of the Certificate of Work (EN) request
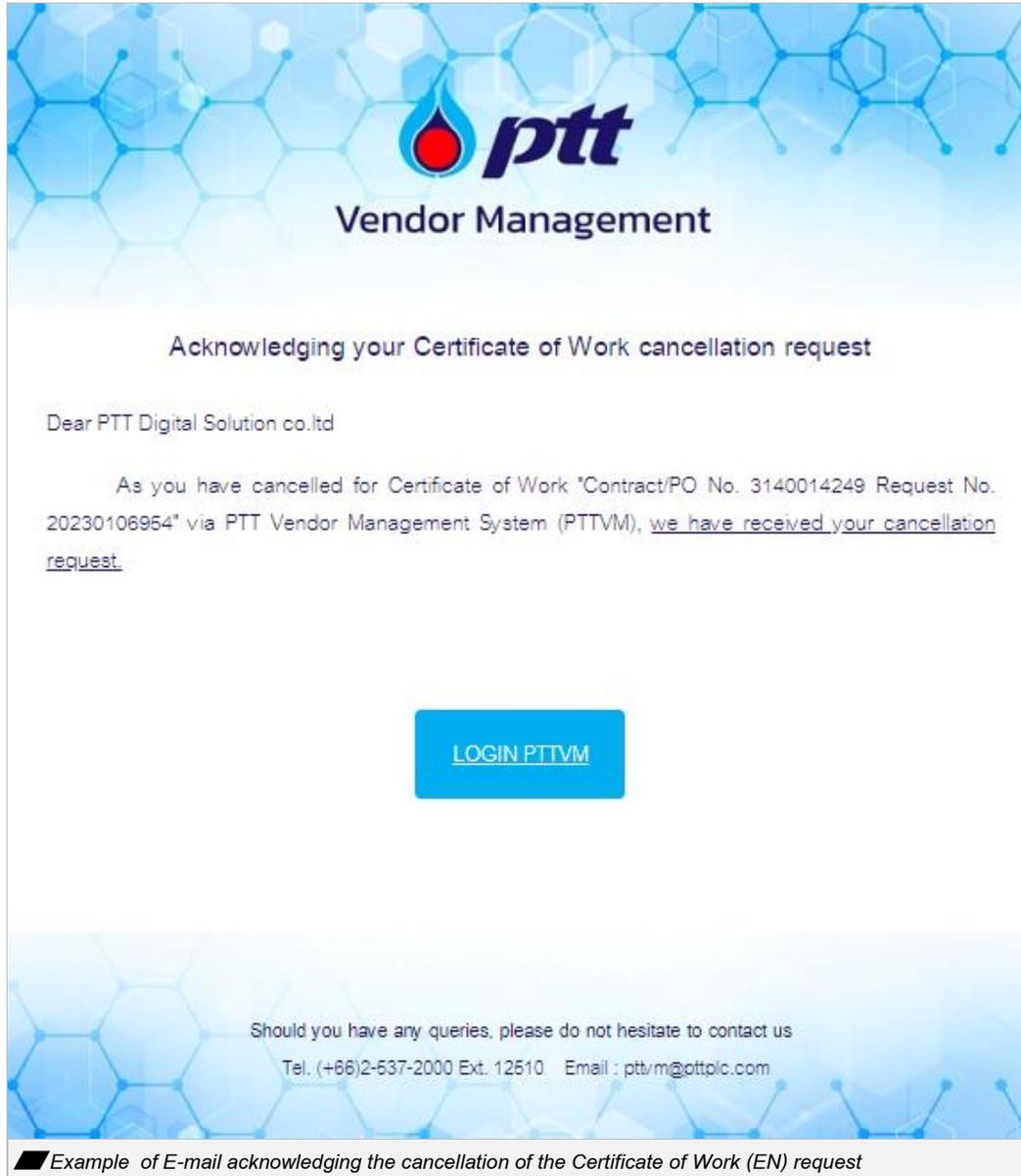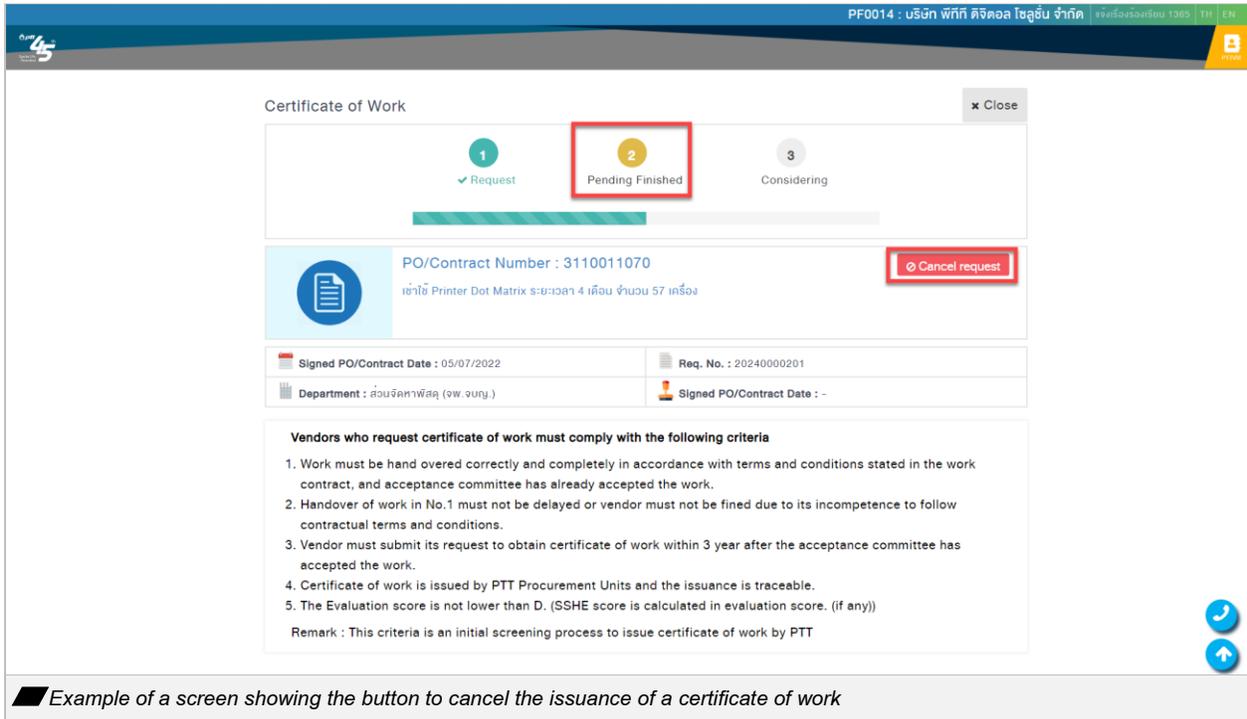
9.4.2 In case of Stage 2 Status: Pending

Example of a screen showing the button to cancel the issuance of a certificate of work

When you press the button Cancel request, a pop-up screen will appear stating the reason for canceling the request and confirming the cancellation of the certificate of work request.

Example of a screen showing the button to cancel the issuance of a certificate of work
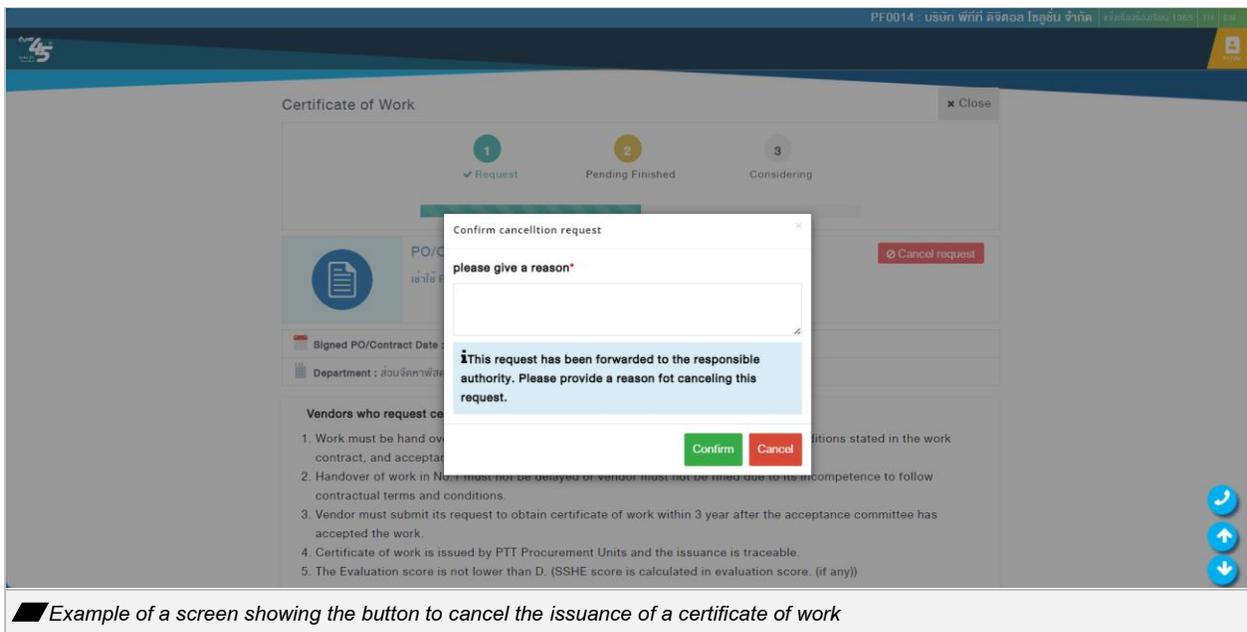
The system will automatically require confirmation before canceling the certificate of work's issue and notifying the vendor via email.

Example of E-mail to acknowledge the cancellation of the certificate of work request (EN)
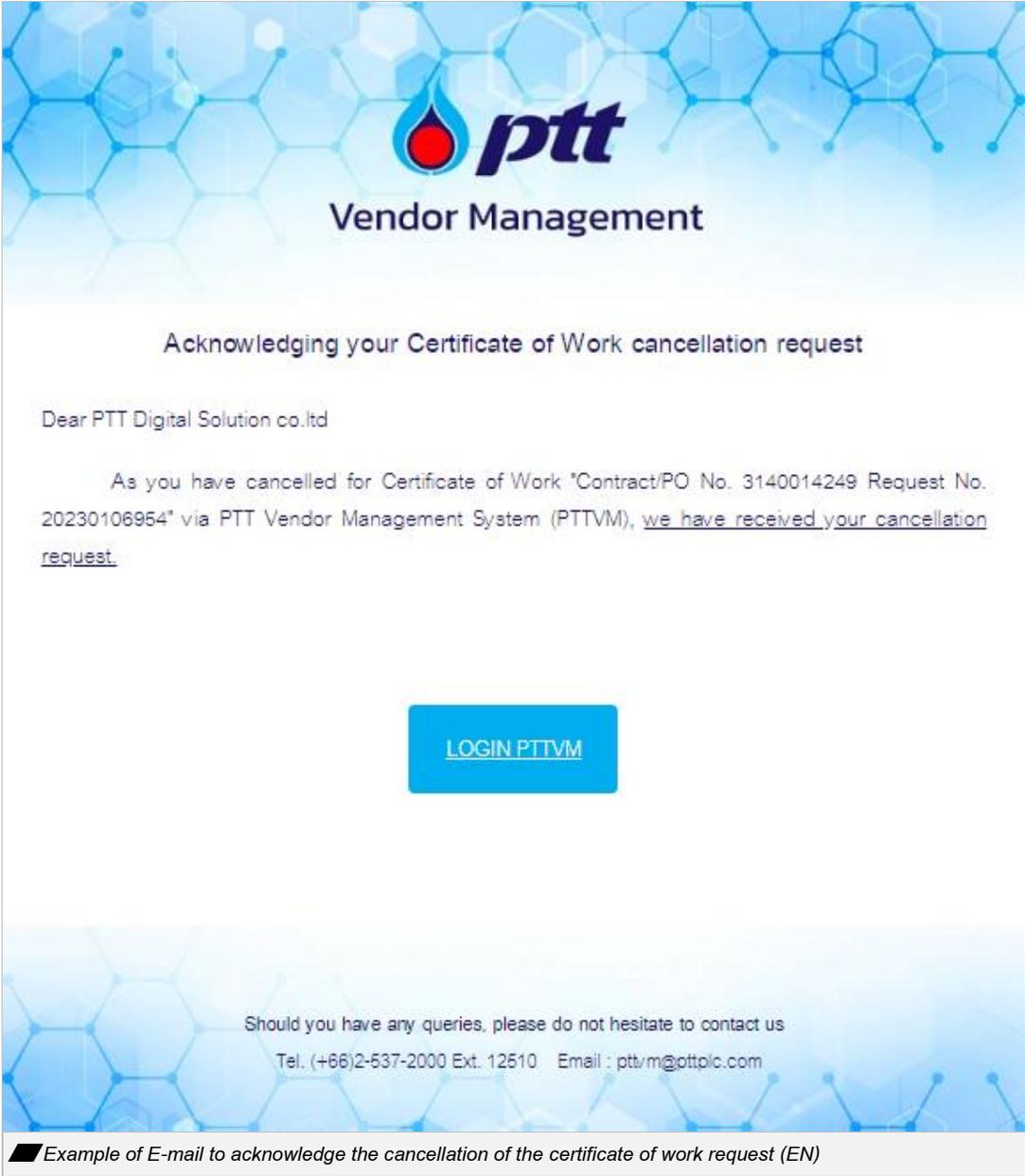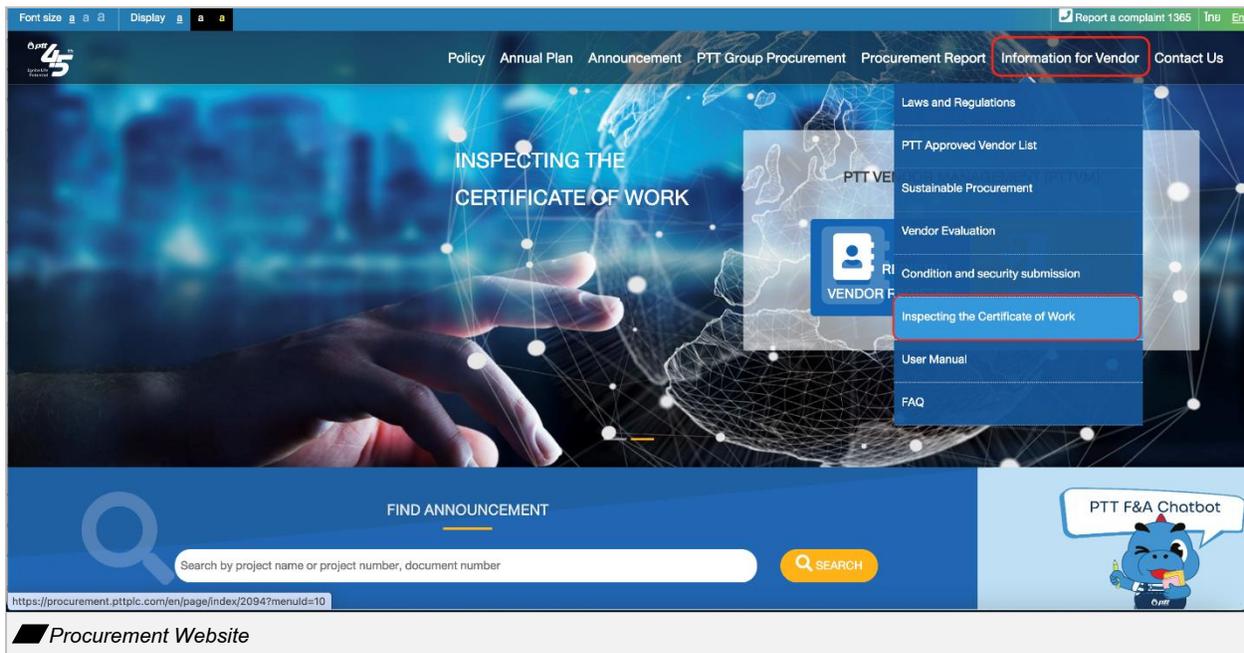
10. Inspecting the Certificate of Work.

10.1 Channel for inspecting the Certificate of Work

Vendors or other parties may utilize this function to inspect the electronic Certificate of Work issued by PTTVM system to ensure its authenticity. There are three ways as follows:
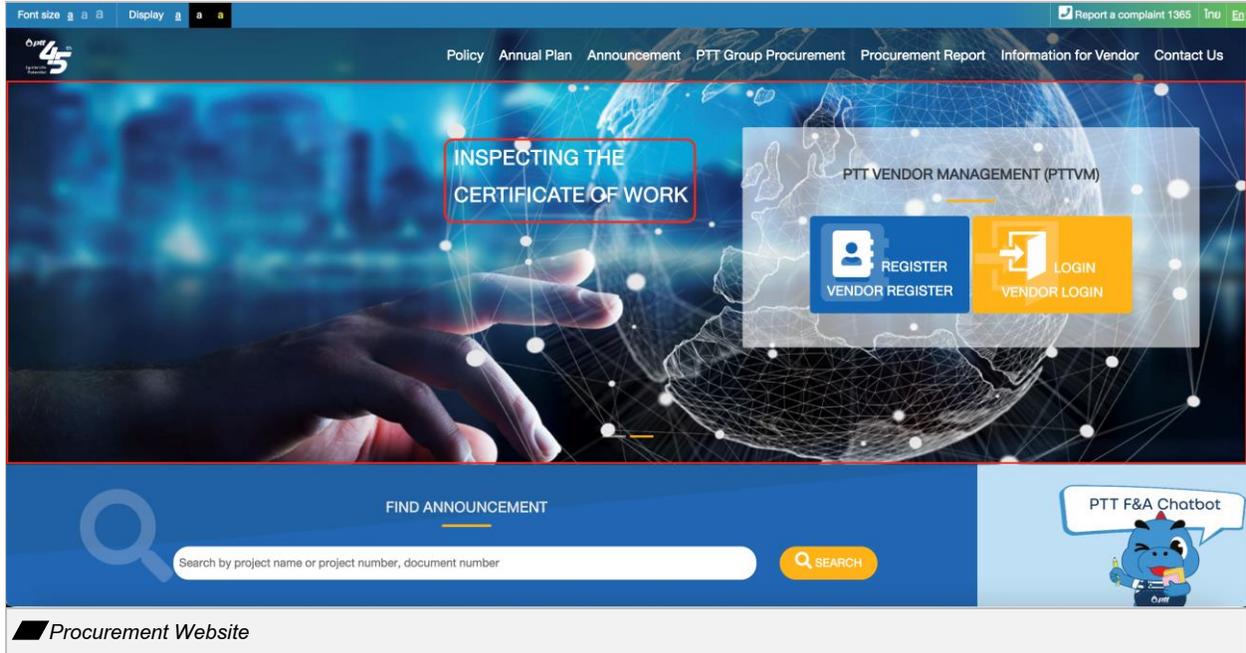
1)   Menu 'Inspecting the Certificate of Work'

Launch to the procurement website URL: https://procurement.pttplc.com/en/home/index , click on the tab 'Information for Vendor' and select the menu 'Inspecting the Certificate of Work'

Procurement Website

2)   Banner 'Inspecting the Certificate of Work'

Launch to the procurement website URL: https://procurement.pttplc.com/en/home/index , and click on the phrase 'Inspecting the Certificate of Work' in the banner.

Procurement Website

3) Icon 'Inspecting the Certificate of Work'

Launch to the procurement website URL: https://procurement.pttplc.com/en/home/index , scroll down to the bottom of the page and click on the icon 'Inspecting the Certificate of Work'.

Procurement Website
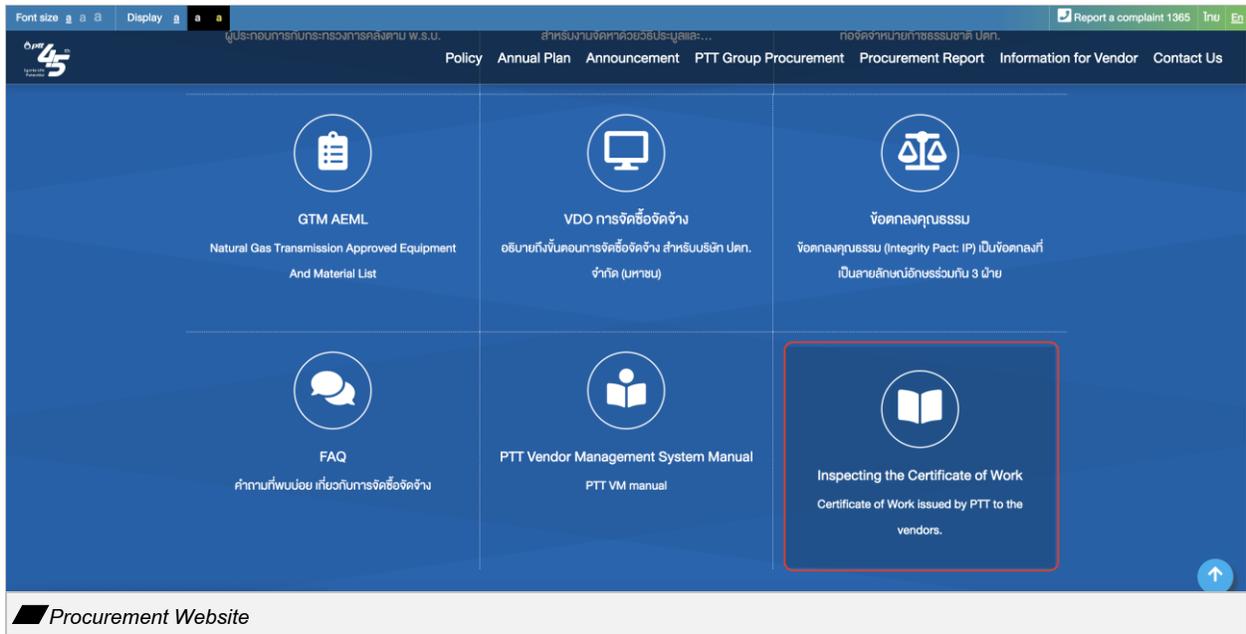
10.2 Inspecting the Certificate of Work Process

To inspect the certificate of work, you must fill in the required information as follows:

1) Certificate of Work Information

   - Certificate Document No.

   - Vendor Name

2) Your Information

   - Company Name

   - First and Last Name

   - Phone No.

   - Email

Inspecting the certificate of work Screen

After pressing the button CONFIRM, you will receive the passcode via email. You must enter the passcode/password in a pop-up screen and press the button Confirm before it expires.

▰ *a popup screen*
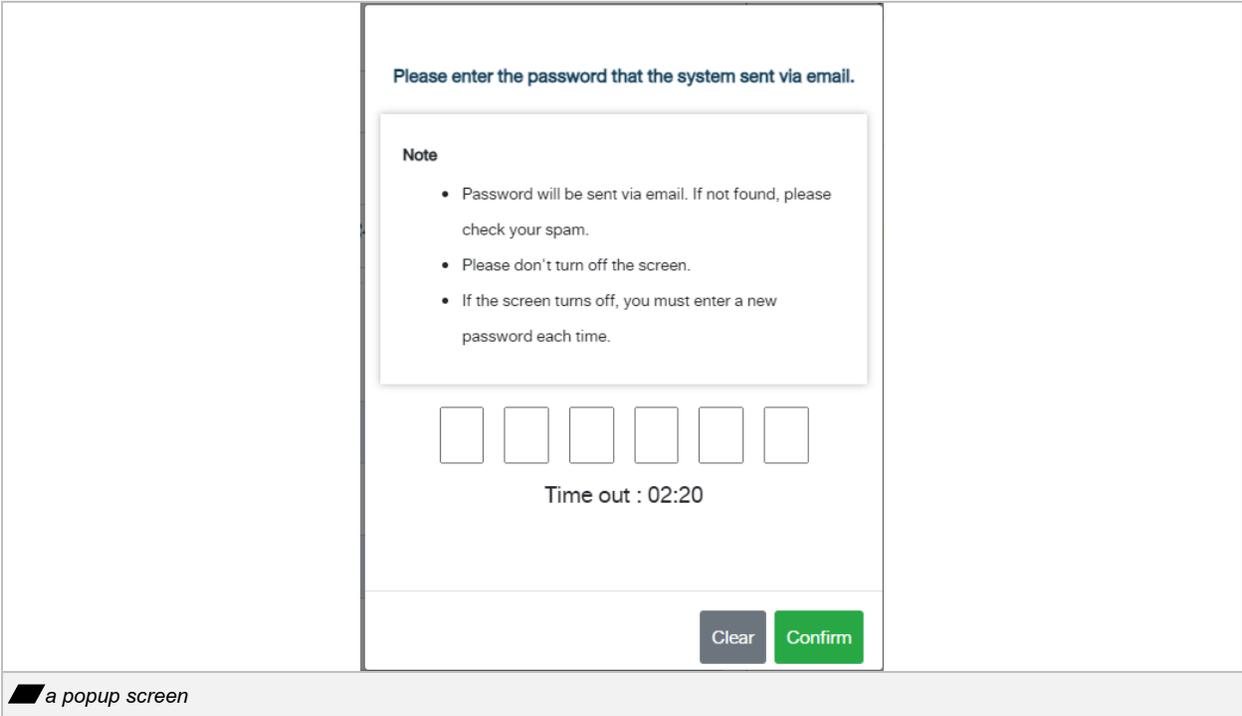
The details of the Certificate of Work will be displayed on the screen, allowing you to verify or compare this information with the details in your Certificate of Work document

▰ *Inspecting the Certificate of Work Results*