Accounts Receivable Department

Customer Portal

Quick User Manual

Login to the platform

- Access to the portal

View My Bills:

- How to get copy of documents
- Extract current account information
- Create a dispute.
- Filters available.

View My Account Master Data:

- Information available

Display My Account Statement:

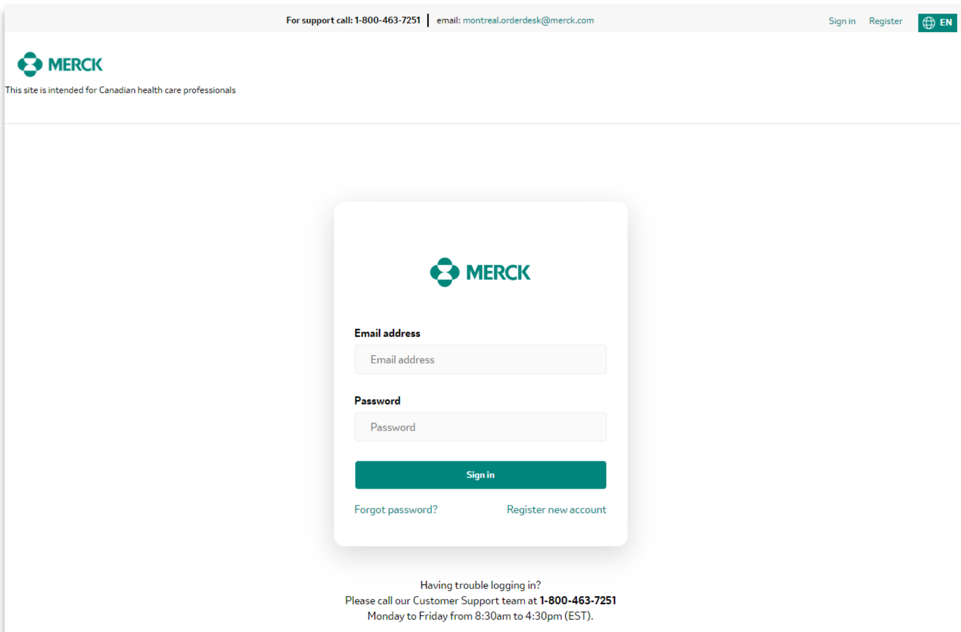
- Filters available.

Sept 2023

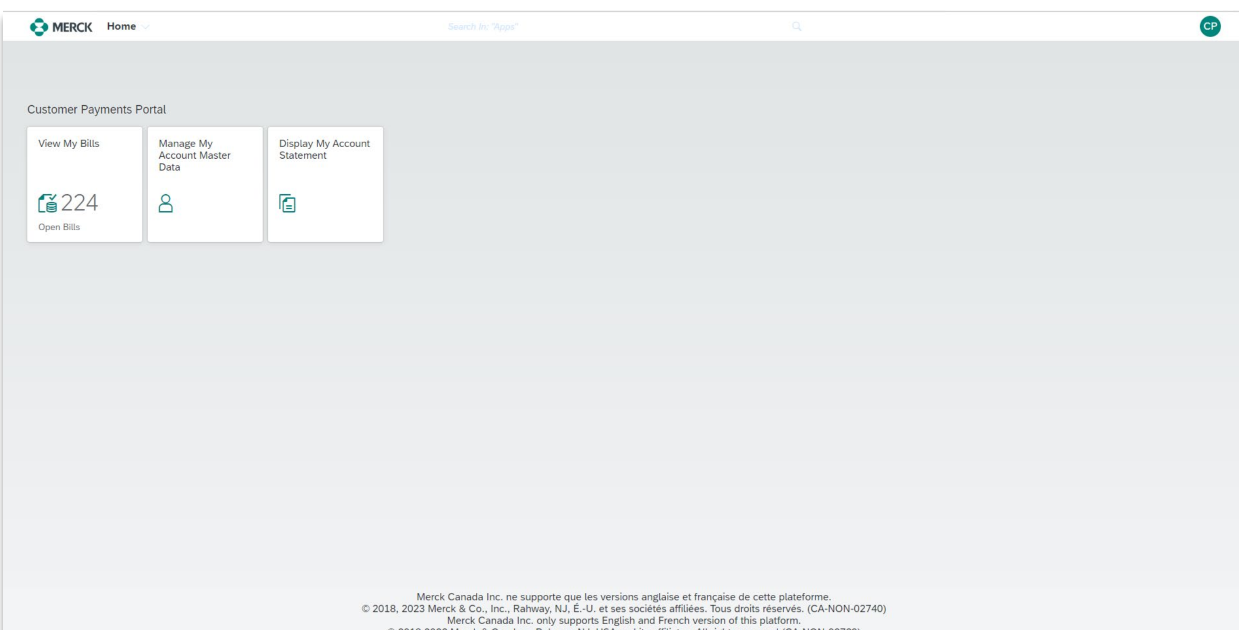
Login to the platform

Logging in to the platform is done through the following website:
https://merckorders.ca/login

After entering the website, you must log in with the provided credentials:

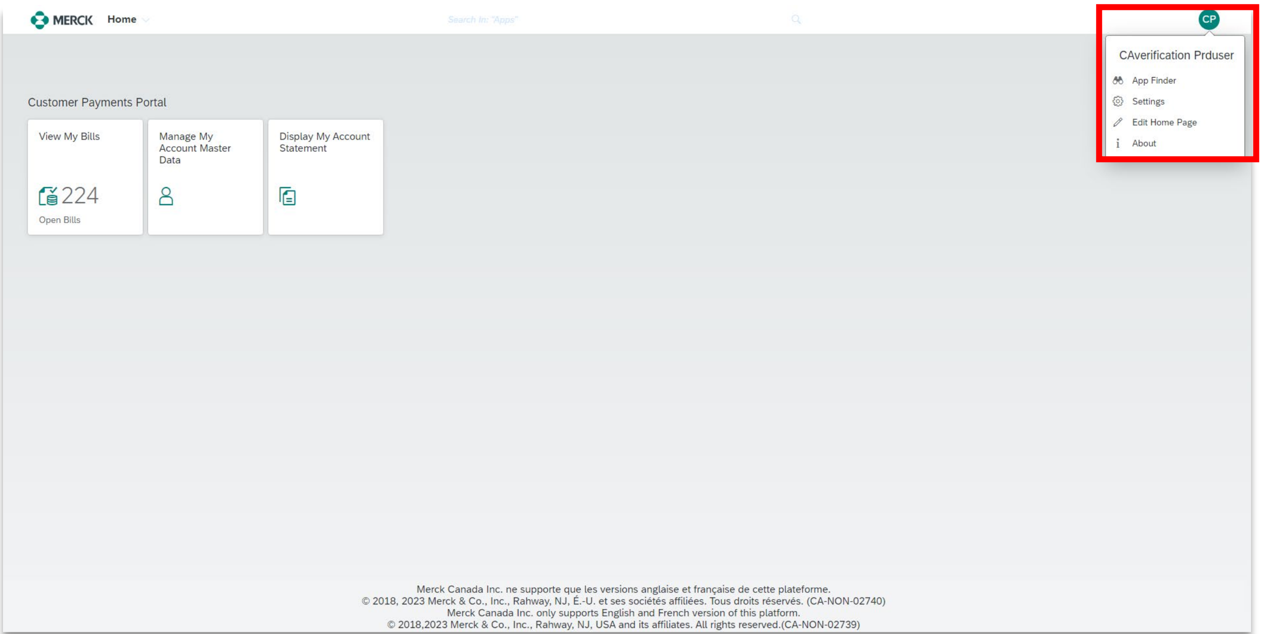


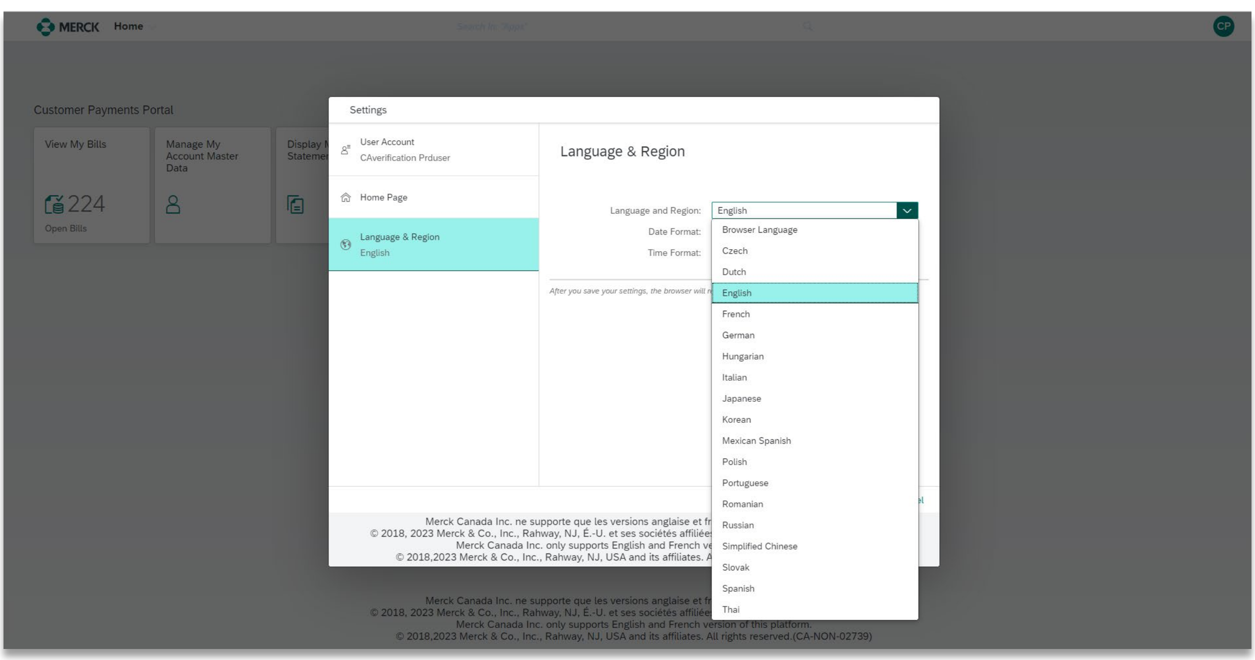
After login, the home page will display the status of your account and different tiles.



You can change the system's language in the settings menu (top right):

*Important: *Merck Canada Inc. only supports English and French version of this platform.*

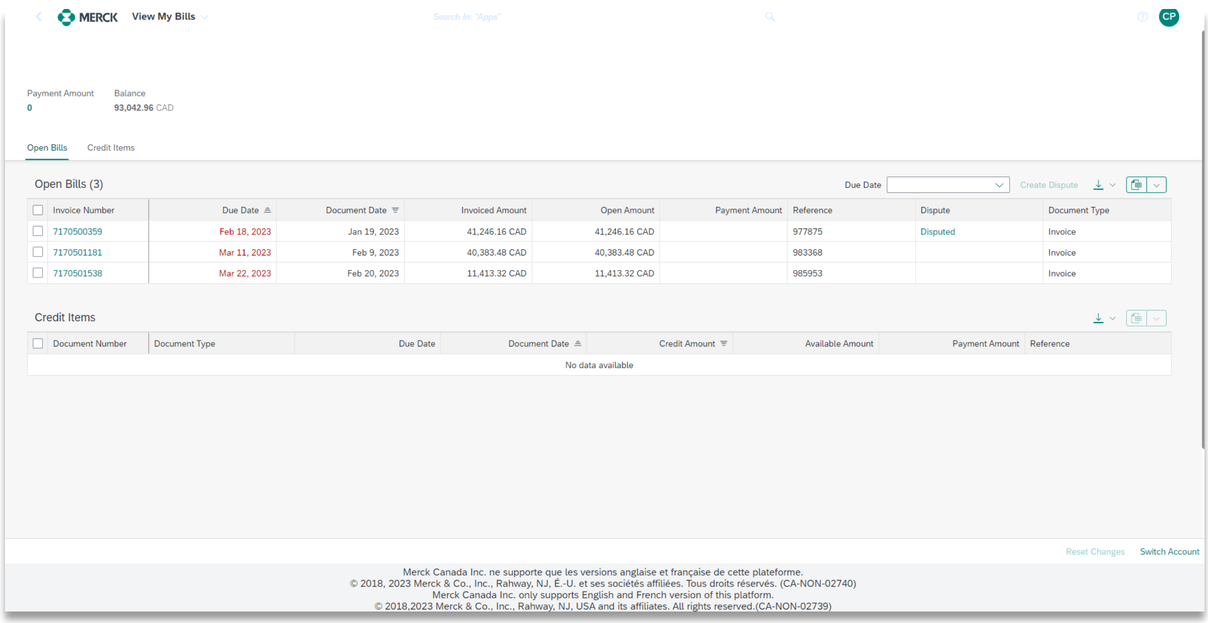




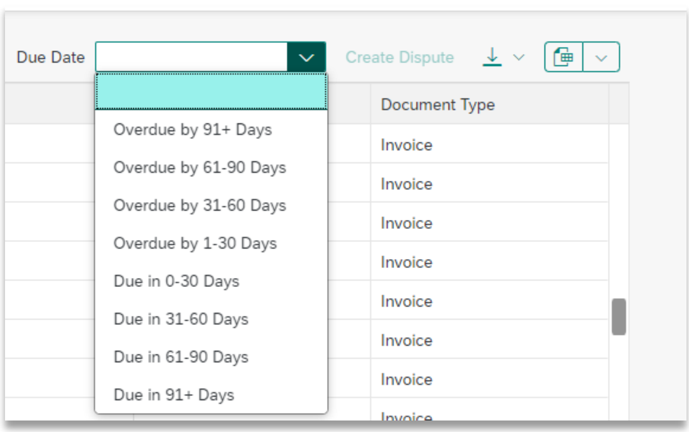
View My Bills

In the "View My Bills" menu you can check your account status in real time.

The application will provide you with several actions where you can, for example, see invoices and credit notes details, export the information in Excel format and also open a dispute in case of any irregularity in the invoice(s)



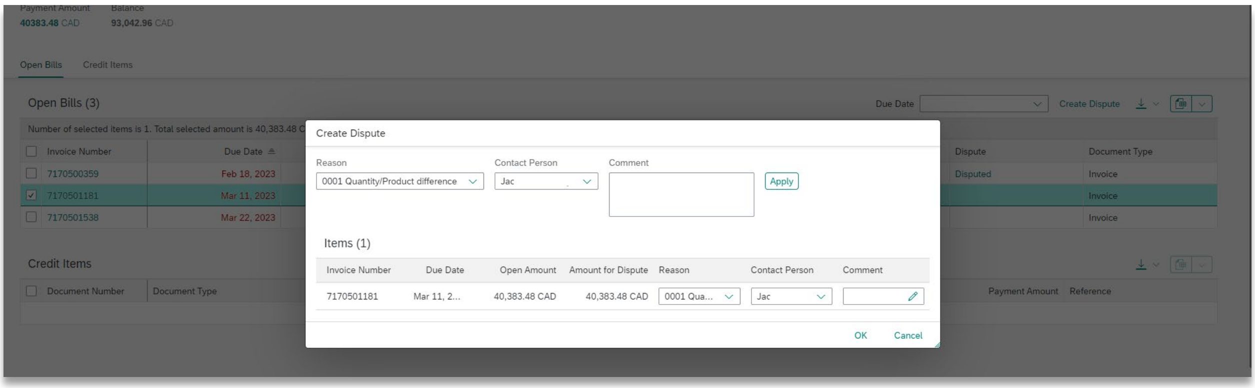
Options:



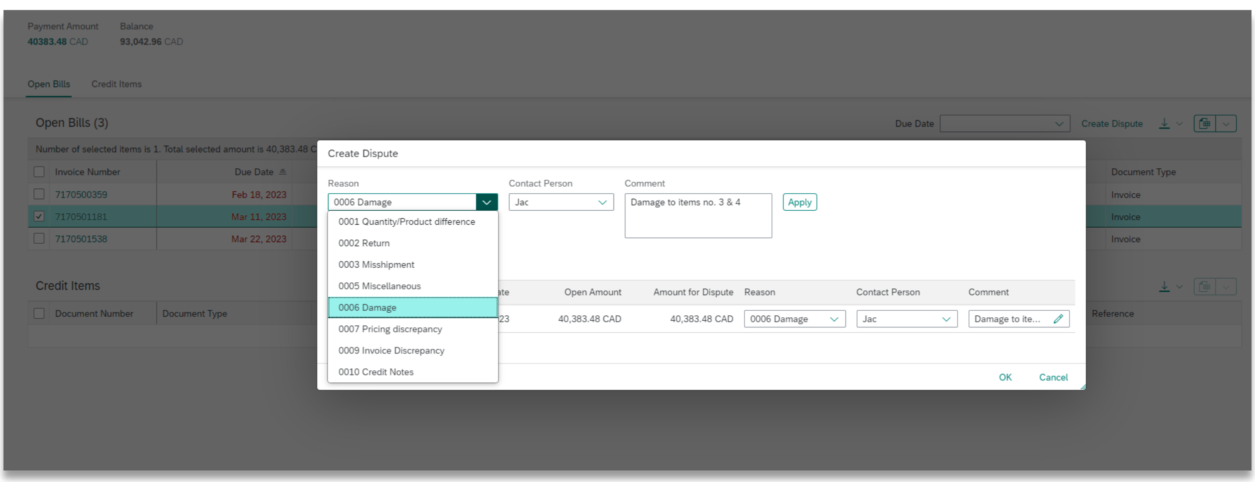
Due Date: You can filter open documents by due date (e.g. Due in 0- 30 days)

Create Dispute: If there is a discrepancy with an invoice after selecting it, you can create a dispute directly in the portal in order to be analyzed.

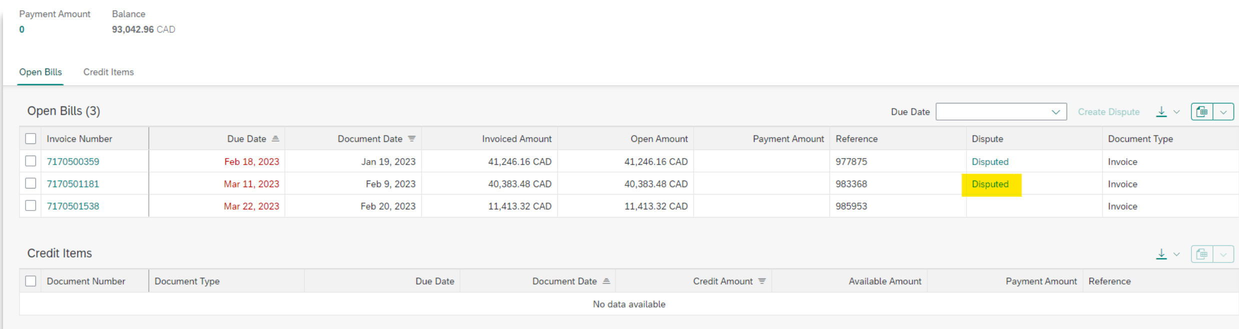
You need to select the invoice (1 or more at the same time) and then click on C**reate Dispute**



If all invoices have the same reason and comment, they can be modified in the first comment box and click on apply, if invoices have different reason/comment, it can by modify line by line



Then, click on ok and dispute case will appear on invoice(s) affected.


Payment Amount 0 | Balance 93,042.96 CAD

Open Bills | Credit Items

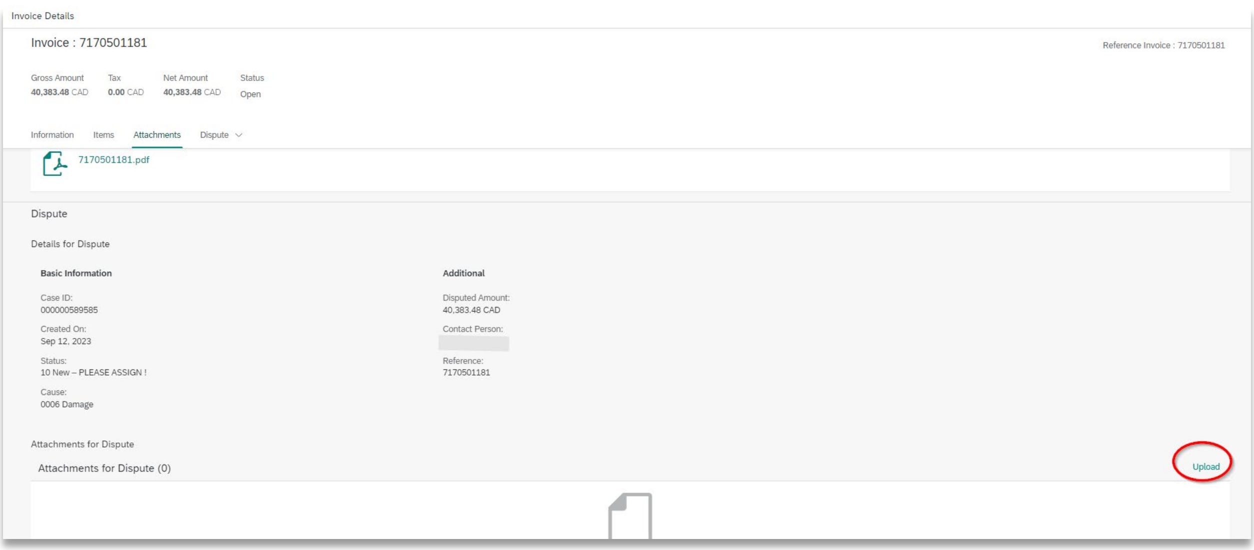
Open Bills (3)   Due Date   Create Dispute

Invoice Number	Due Date	Document Date	Invoiced Amount	Open Amount	Payment Amount	Reference	Dispute	Document Type
7170500359	Feb 18, 2023	Jan 19, 2023	41,246.16 CAD	41,246.16 CAD		977875	Disputed	Invoice
7170501181	Mar 11, 2023	Feb 9, 2023	40,383.48 CAD	40,383.48 CAD		983368	Disputed	Invoice
7170501538	Mar 22, 2023	Feb 20, 2023	11,413.32 CAD	11,413.32 CAD		985953		Invoice

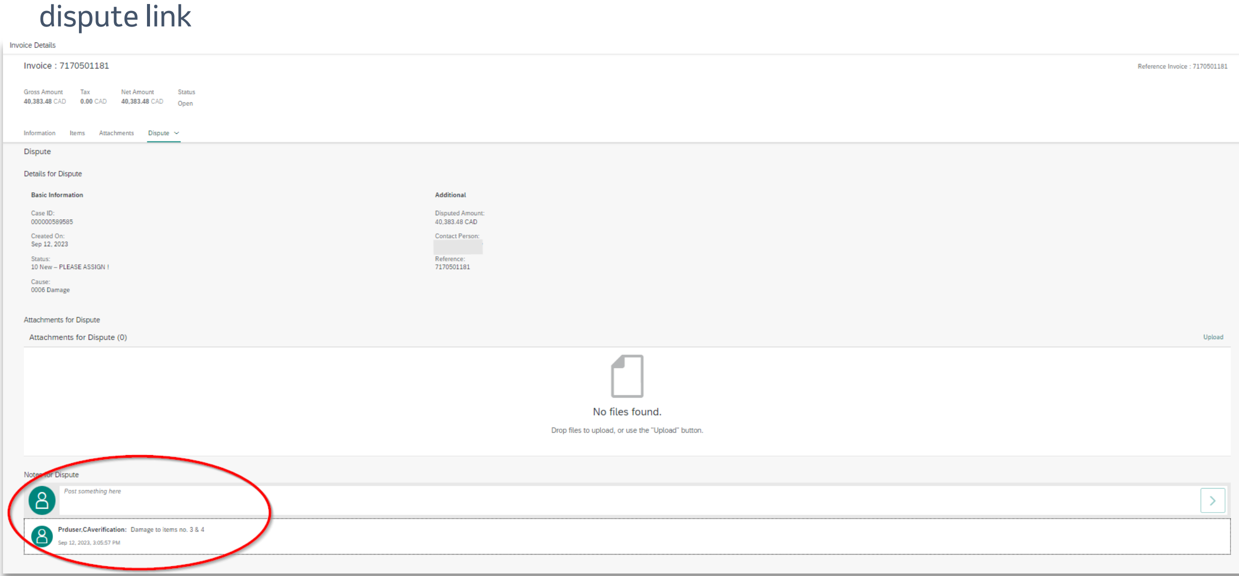
Credit Items

Document Number	Document Type	Due Date	Document Date	Credit Amount	Available Amount	Payment Amount	Reference
No data available							

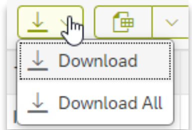
By clicking on the dispute link, you can see the comment entered, creation date, status and also in case you need, you can upload any document needed by clicking on "upload"



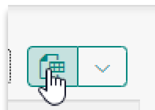
Any time, the Merck team update the status of the dispute, changes will be visible in the dispute link



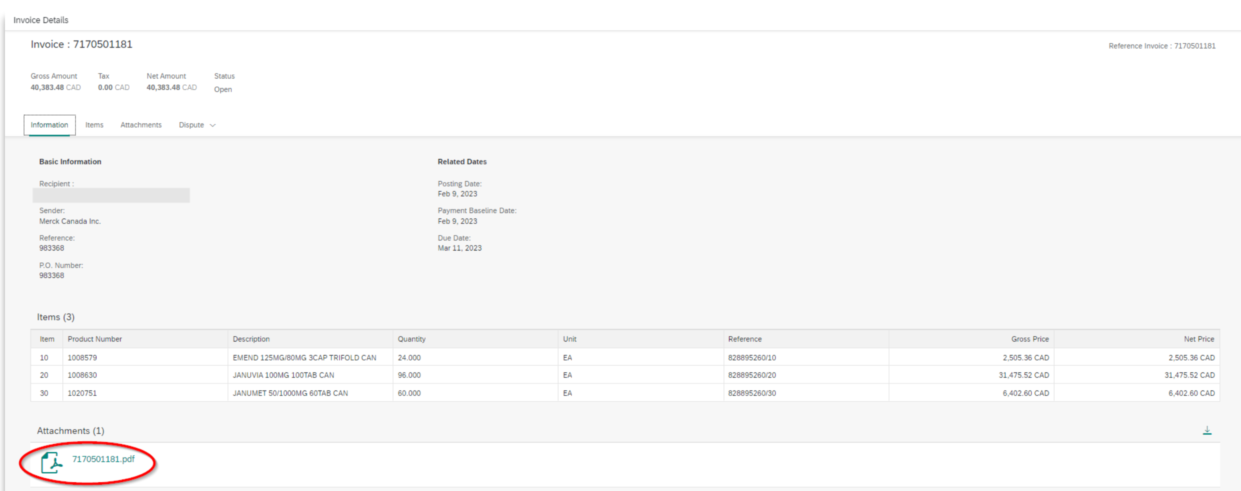
Download: From the download menu you can select the invoice(s) you want to download, or you can download all open invoices in PDF format:



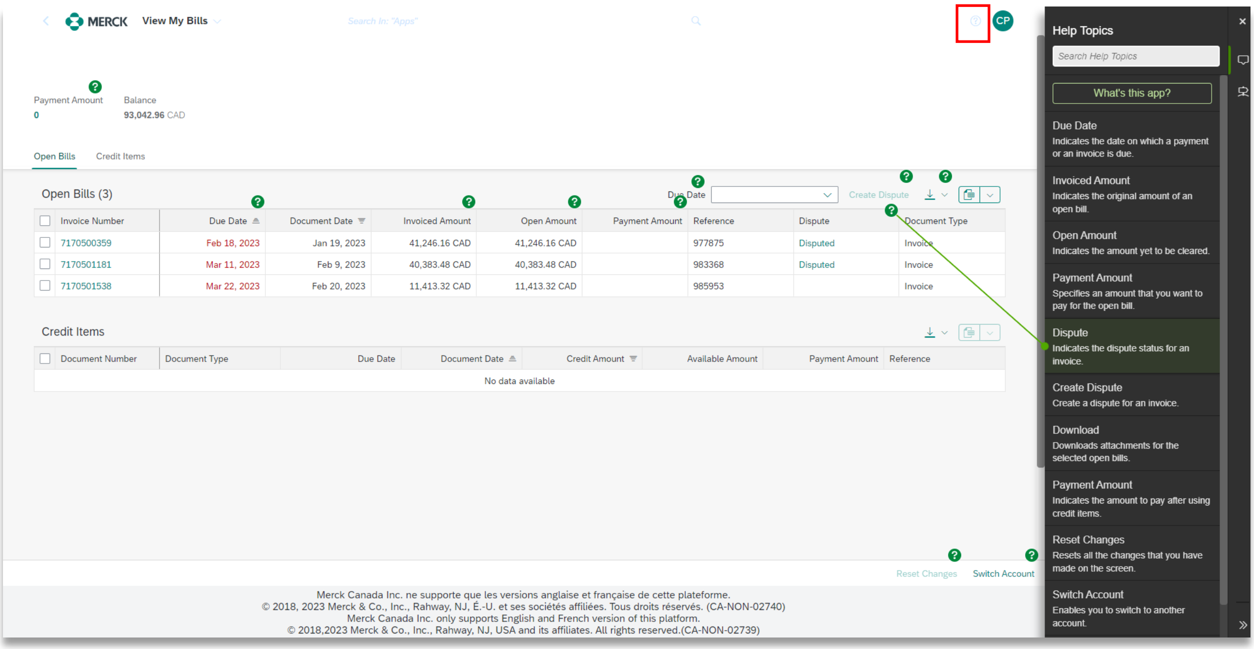
Export to Spreadsheet: By clicking this field the system will export the list of open invoices in Excel format.



You will be able to see that the invoices and credit memos are hyperlinks. If you click on the invoice/credit memo you will have access to the invoice details, as well as check the copy of the invoice online in PDF format:



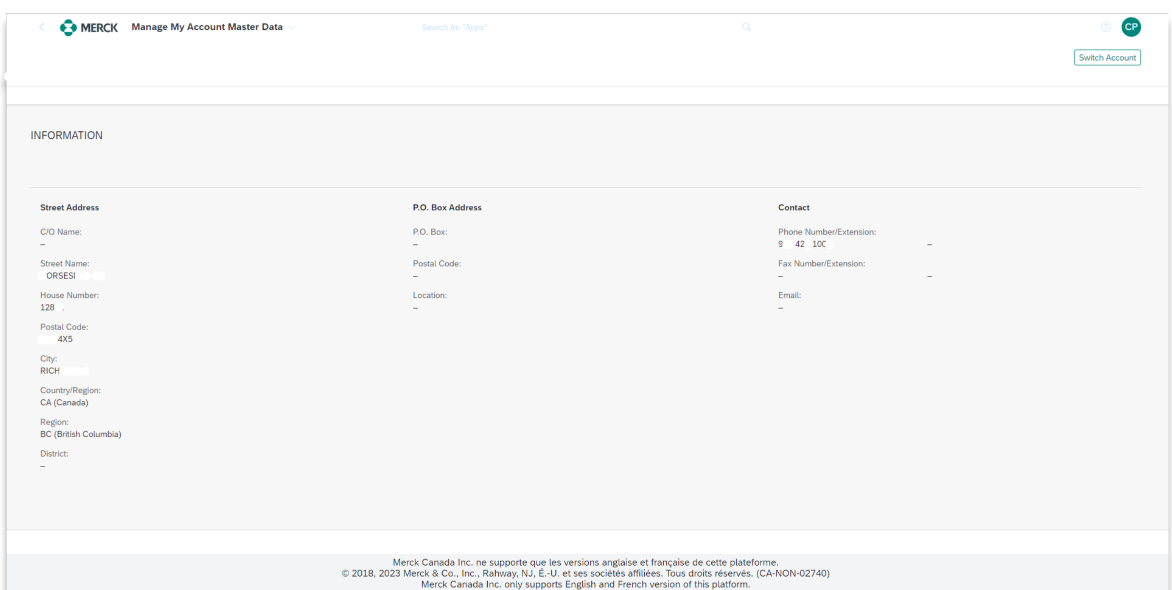
At any point, if you require any clarification about the columns field, you can click on the question mark symbol, on right corner and a description of fields will appear.



Manage My Account Master Data

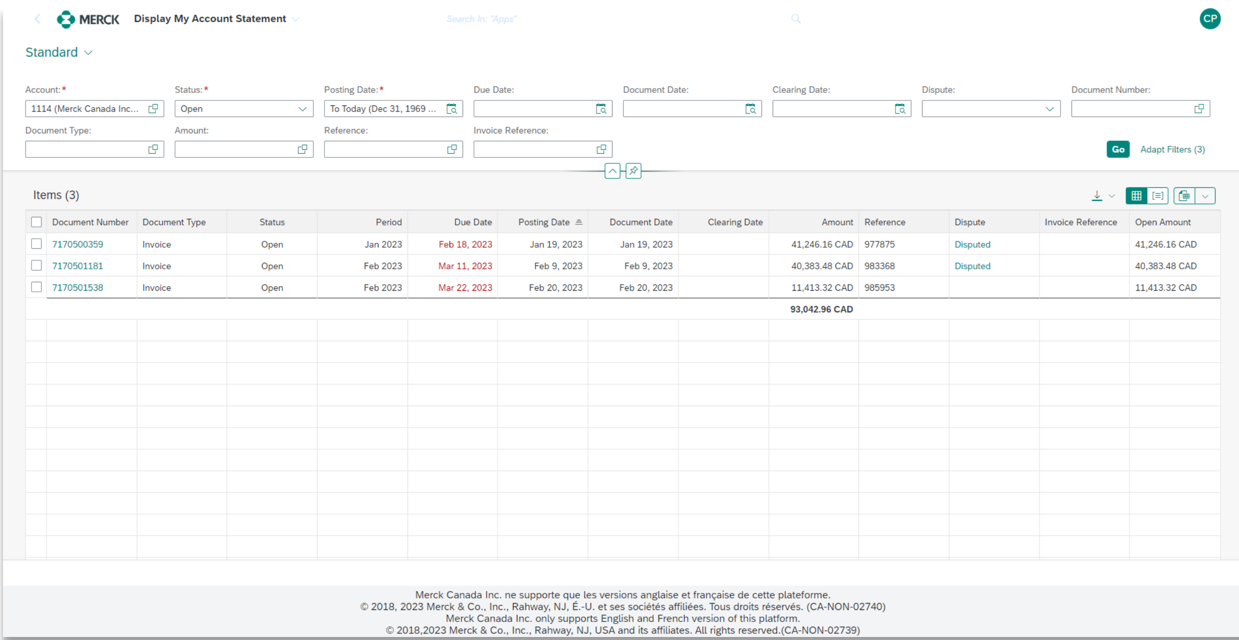
In this tile you can check your general Merck account details such as address, contacts, etc.

If there is any information that should be updated and/or amended, you must contact our Customer Service department at 1-800 463 7251 or via email at montreal.orderdesk@merck.com



Display My Account Statement

The Account Statement Menu is where you can check all transactions (past/closed and current).

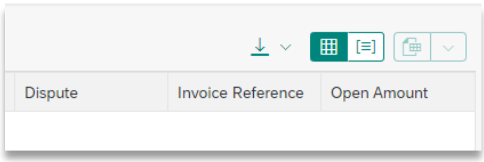


Options available:

Filters: You can filter all documents depending on your needs.

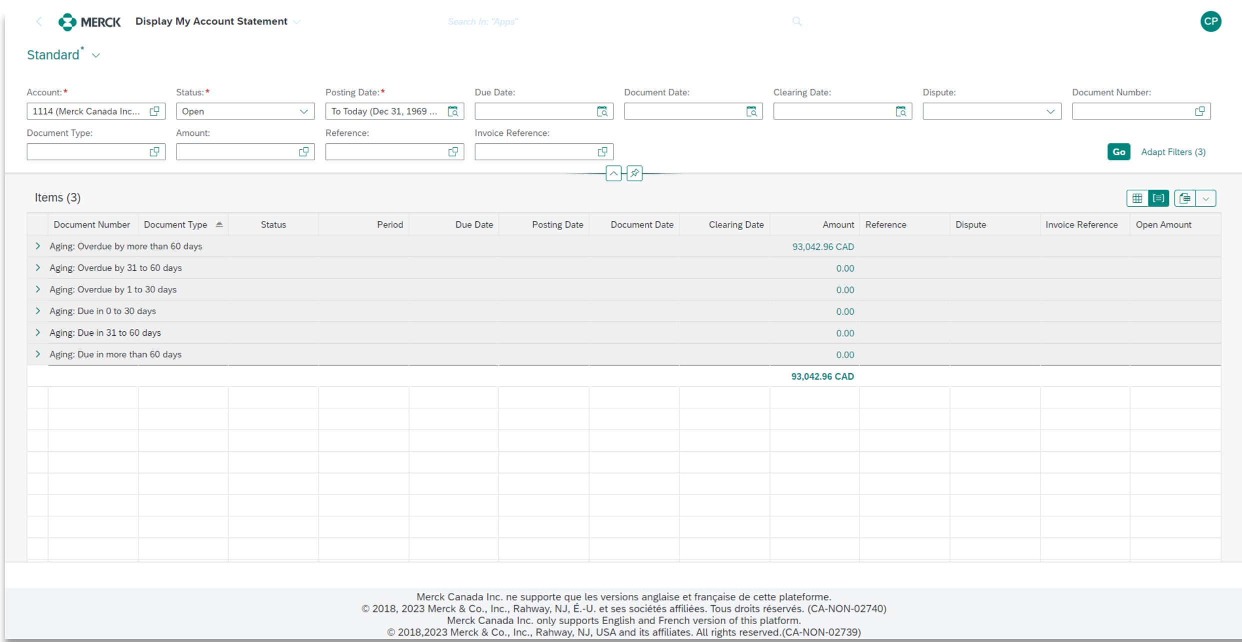
- **Status:** Open, Cleared, All
- **Posting Date:** Date document was posted to account. Choices from the dropdown menu vary by: Single Dates, Date ranges, Months, Years, no Group…
- **Due Date** : Due Date for the payment. Same choices as for "Posting Date" filter
- **Document Date:** Date document was issued. Same choices as for "Posting Date" filter
- **Clearing Date:** Payment date.
- **Dispute:** Can select "Disputed" to see all invoices for which a dispute was created or "Not disputed".
- **Document Number:** Correspond to the invoice/credit or payment number
- **Document Type:** Choices are: Account. Document, Credit Memo, Credit for Returns, Debit Memo, Debit Note, Invoice or Payment
- **Reference:** Purchase Order Number/claim number entered by customer or assigned by default
- **Invoice Reference:** For invoice with status "payment", an invoice number will appear in the column

In the list of documents, you can see that you have 3 icons available:



By default, the view shown will be the detail of all documents.

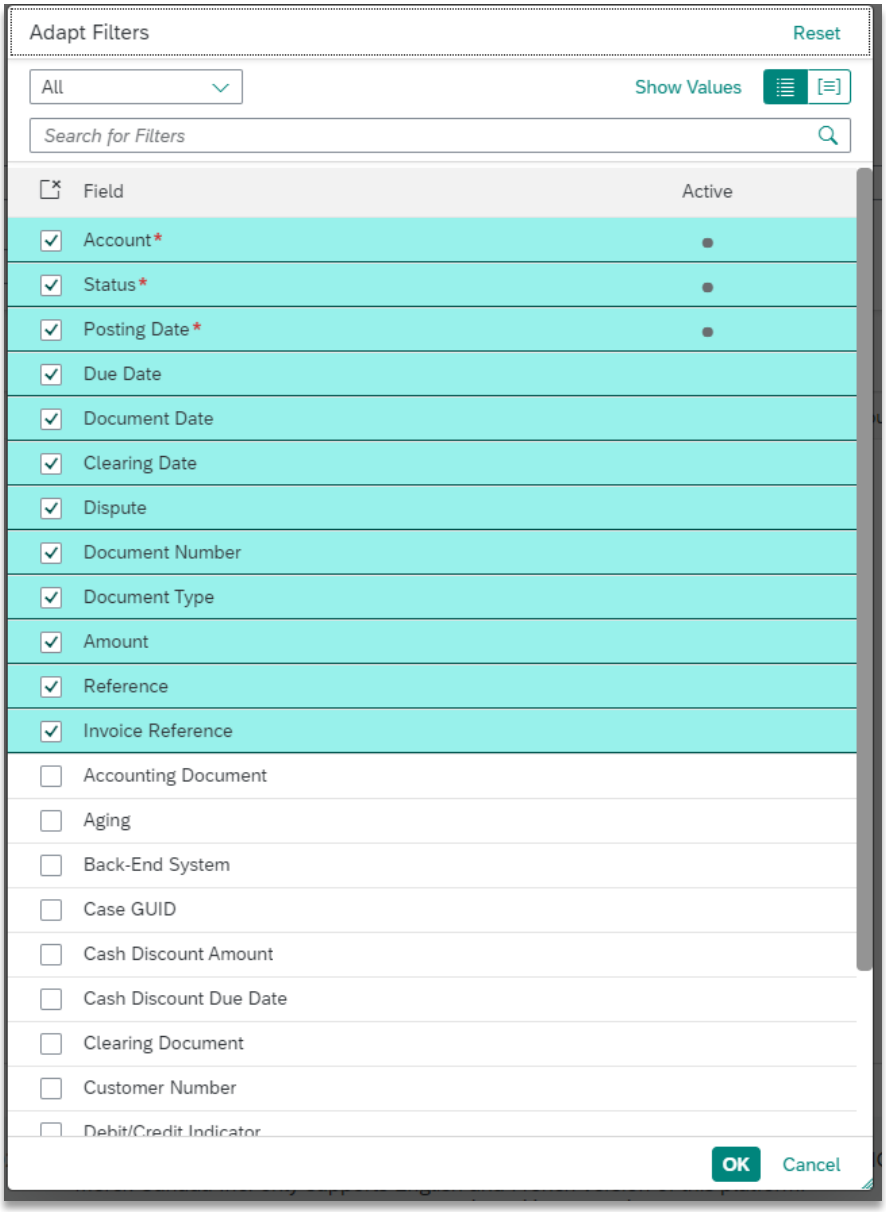
The second option (Aging View) can check the subtotals by age of documents (the basis of ageing is based on the due date):



When you drill down on the line, the details of the documents will be shown.

Advanced filters:

If you need to filter the documents in greater detail, you can click on "Adapt Filters" and will be shown all available fields:



To download in Excel format, you can simply click on the icon: