Oracle
Textura
Getting Started on the Oracle Cloud Store and TPM

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Contents

About TPM 5
Using the Subcontractor Invitation Email 5
Creating a Username and Password 5
Updating a User Profile for Subcontractors 6
Setting Up a Verification Phone Number 7
Updating the Organization Profile for Subcontractors 7
Choosing Organization Settings for Subcontractors 8
Store Registration Email 9
Add TPM to the Cart 10
Create an Oracle Cloud Store Account 11
Continue Checkout Process 12
Add Additional Information 12
Add Service Details 12
Add Billing Information 12
View Payment Information 13
Update Tax Exemption Status 13
Accept Terms and Conditions 13
Confirm and Place Order 13
Copyright 15

About TPM

The Oracle Textura Payment Management system (TPM) is an internet-based construction invoicing and payment solution. With TPM:

- Pay application documents are automatically generated, electronically signed, and available online for review and approval
- Payments are made electronically, resulting in faster access to funds
- Compliance documents can be submitted and tracked online.

Users benefit from increased productivity, lower costs, reduced risks, improved communication, and better cash flow.

- Watch the ***Textura Payment Management Introduction Video https://players.brightcove.net/2985902027001/SyXjZnYeeb_default/index.html?videoId=5793914920001*** for information on how to navigate and use TPM.
- Watch the ***Textura Payment Management Subcontractor Video https://players.brightcove.net/2985902027001/SyXjZnYeeb_default/index.html?videoId=5982212209001*** for a view of the Subcontractor TPM experience.
- Watch the ***Textura Payment Management General Contractor Video https://players.brightcove.net/2985902027001/SyXjZnYeeb_default/index.html?videoId=5982251337001*** for a view of the General Contractor TPM experience.

Using the Subcontractor Invitation Email

Users receive an email to set up an account on the Oracle Textura Payment Management (TPM) system.

Follow the links contained in the system-generated email invitation to create an account.

> **Note:** A Textura representative or a General Contractor invites a Subcontractor to use the system. A Textura representative, General Contractor, or Prime Subcontractor can invite a Sub-Tier.
>
> **Missing an invitation?**
>
> A Textura representative can resend it. Contact Oracle Support.

- Use the first link to see user setup instructions.
- Use the second link to go to the **Create Username** page.

Creating a Username and Password

To create a username and password:

1) Navigate to the Create Username Page.

2) In the **Username** field, enter a new username you will use to log in to the system.
   Usernames must adhere to the rules presented on the page.
3) Enter a password.
   Passwords must adhere to the rules presented on the page.
4) Verify the password entered by entering it a second time.
5) Select **Submit**.
   The application saves the username and password information, and the **Edit User Profile** page displays.

Updating a User Profile for Subcontractors

To update your user profile on the **Edit User** page:

1) Navigate to the Edit User Page.
2) Select the **Edit My Account** link under your username at the top of any page to go to the Edit User page.

> **Note:** The **Edit User** page displays automatically after you create your username and password as a part of your account setup process.

3) In the **User Information** section, complete all required fields. Required fields are marked with a red asterisk.
4) In the **Contact Information** section, complete all required fields. Required fields are marked with a red asterisk.
5) Enter a verification phone number.
   All Enterprise Administrators must provide a two-step verification phone number. All other users may optionally add a verification number to enhance their account security.
6) (Optional) In the **Notification and Permissions** section, select email and date formatting settings.
7) Select each permission you should have on the application.
   Only Administrators can assign permissions to other users.
   If you change user roles or permissions after creating the user profile, you will receive an email about the change.
   See User Roles for Subcontractors and User Permissions List for Subcontractors for more information.
8) Enter Notary information if you assigned yourself the **Notarize Documents** permission.
   Laws about electronic notarization differ in each state. Before entering notary information on the application, familiarize yourself with your local state laws. For example, notaries in Virgina need to include their Notary certificate number and notaries in Maryland must include their Notary county. Colorado notaries need to include their Document Authentication Number (DAN) when notarizing documents.
   See the Electronic Notarization on TPM for Subcontractors topic for more information.

9) If the project uses consent forms, read the attached data collection consent form and select the check box to signify acceptance of the policy.
10) Select **Save Profile**.

A **Status** page confirms your profile has been updated.

Setting Up a Verification Phone Number

To set up a verification phone number on the **Edit User** page:

1) Navigate to the Edit User Page.
2) From the **Verification Phone Number** section, select the **Setup Verification Number** link.

   A dialog box appears.
3) In the dialog box, enter a phone number, and select the **Add Phone Number** button.

   A **Verify Identity** dialog box appears.
4) In the **Verify Identity** dialog box, select to receive the security code as a text message (SMS) or voice call, and choose the **Continue** button. You can also choose to authenticate your account through a code sent through the Authy app or other authenticator apps on your mobile device.

   > **Note:** You can download the Authy app from ***https://authy.com/download/ https://authy.com/download/***.

   - An **Enter Security Code** dialog box appears.
   - The application sends a 7-digit security code to your phone via text message (SMS), voice call, or the Authy app.
5) In the **Enter Security Code** dialog box, enter the security code, and choose the **Continue** button.

   The application saves the phone number, and the **Edit User** page displays only the last four digits.

Updating the Organization Profile for Subcontractors

To update your organization profile on the **My Organization Profile** page:

1) From under your organization name at the top of any page, select **My Organization Profile**.

   The **My Organization Profile** page displays.

   > **Note:** This page also displays automatically as a part of the account setup process.
2) In the **General Information** section, complete all required fields. Required fields are marked with a red asterisk.

3) In the **Tax ID** field, enter your Federal Employer Identification (FEIN), a nine-digit number formatted with a dash.

> **Note:** If you are a Canadian organization and your bank country is in Canada, you must select the **Edit Provincial Tax IDs** link. In the dialog box that displays, either enter a tax ID in the available fields, or enter n/a if a tax ID is not applicable.

4) (Optional) Add a diversity status.

   Select the **Manage Classifications** button to open a dialog box. See the ***Adding a Diversity Status*** ***https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10309364_1.htm*** topic for more information on how to complete this step.

5) In the **Bank Information** section, complete all required fields. Required fields are marked with a red asterisk. Fields required for payment are marked with blue asterisks.

   Only Enterprise Administrators in your organization can see or change your bank account information. Once entered, only the last four digits of the bank account number will display on this page.

> **Note:** If you sign out of Textura without completing your bank information, you will see a banner prompting you to enter your bank account information every time you sign back into Textura.

6) (Optional) Choose how to pay your TPM usage fees. As an option, you can choose to add a credit card.
7) Select the **Save Changes** button.
   - A **Success** message appears, confirming you saved the page.
   - If you are the first account user in your account and have not yet purchased the TPM product, you will need to go to the Oracle Cloud Store to complete the provisioning process. Check your inbox for a store registration email.
8) (Optional) Select the **My Organization Settings** link to go to a page to select additional settings for your organization.

Choosing Organization Settings for Subcontractors

After completing your organization profile, you can select additional settings for your organization. These settings are optional, and you can change them at any time from the **My Organization Settings** page.

To edit your organization settings:

1) Navigate to the **My Organization Settings** page.
   - From under your organization name at the top of any page, select **My Organization Settings**.

- From the bottom of the **My Organization Profile** page, select the **My Organization Settings** link.

2) Select organization settings.
   - From the **Default Date Input Format** drop-down, select a date input format the application will use to display date stamps
   - From the **Days before passwords expire** drop-down menu, select how many days should pass before user passwords expire.
   - (Optional) Add segments to organize projects into custom groups.

     See the ***Creating a Segment for Subcontractors*** ***https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303357.htm*** topic for how to use this feature.
   - (Optional) Use the **Manage Data Collection** button to set up a data consent form.

     See the ***Manage Data Collection*** ***https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10309466.htm*** topic for more information about this feature.
   - Choose additional organization settings.

     For a list of available settings, see the ***Organization Administration Overview for Subcontractors*** ***https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10313848.htm*** and ***Project Administration Overview for Subcontractors*** ***https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10313849.htm*** topics.
3) Select the **Save Changes** button.

   A **Success** message appears, confirming you saved the page.
4) (Optional) Select the **My Organization Profile** link to go to a page to edit your organization profile.

Store Registration Email

The Store Registration Email includes a unique link to the TPM product page on the Oracle Cloud Store.

Select the link in the email to navigate to the Oracle Cloud Store.

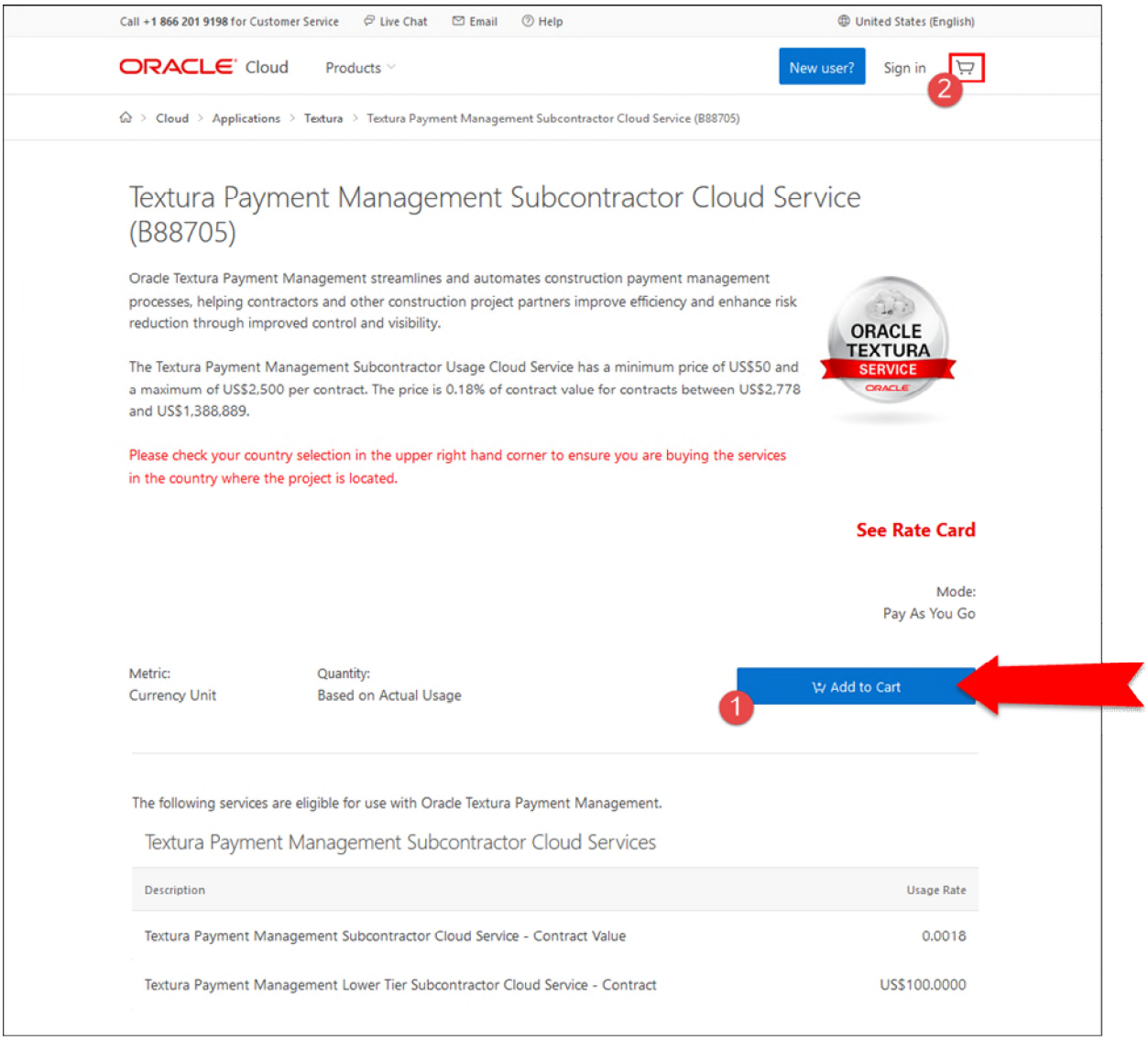
The link:

- Does not expire
- Can only be used once.

Add TPM to the Cart

> **Caution:** Do **not** choose the **New User?** button at the top of the page. This will disrupt the Oracle Cloud Store setup workflow.

The Oracle Cloud Store displays information about the Oracle Textura Payment Management Cloud Service (TPM) product, including usage fees. TPM is a standalone product. Other Oracle products cannot be added to the cart.



1) Add to Cart
   Select the blue **Add to Cart** button near the top of the page. A red 1 displays next to the cart icon at the top of the page.

2) Select Cart
From the top of the page, select the cart icon. The store navigates to the Your Shopping Cart page.
3) (Optional) View Rate Card
Choose the Show Rate Card Details link to see how costs are determined within TPM

> **Note:** Usage fees are unique to each organization type, project, and contract. Purchasing TPM from the Oracle Cloud Store does not cost anything. You will only pay usage fees through the TPM system.

4) Checkout
Choose **Checkout**. The page reloads and displays a **Checkout** message.
5) Create Oracle Cloud Store Account
From the **Checkout** message, choose the blue **New User** button. The Oracle Cloud Store navigates to a **Create an Oracle Account** page.

Create an Oracle Cloud Store Account

An Oracle Cloud Store account is separate from an Oracle Textura Payment Management (TPM) account. It is needed to purchase TPM.

1) Enter Contact and Password Details
   - First Name
   - Last Name
   - Email Address

   > **Note:** Your email address becomes your username.

   - Password
   - Retype Password
   - Country.
2) (Optional) Receive Oracle Product Emails
Select the check box to receive emails about Oracle products, services, and events
3) Create Account
Choose the blue **Create Account** button. The Oracle Cloud Store sends a verification email to the address entered on the **Create an Oracle Account** page.
4) Verify Email
   1. Navigate to the email in your inbox.
   2. From the email, select the **Verify email address** button.
   The Oracle Cloud Store opens in your default browser.

5) Sign In
From the Oracle Cloud Store, enter the username and password you created, and choose the blue Sign In button.

The Oracle Cloud Store returns to the checkout process.

Continue Checkout Process

The next page of the Oracle Cloud Store includes additional sections and fields. Complete each section before continuing.

Add Additional Information

The **Additional Information** section includes **Company Information**, **Cloud Account Administrator**, and **Main Location Phone Number** details.

1) Complete all fields:
   - **Company Information**—Enter company details
   - **Cloud Account Administrator**—Enter contact information for the Oracle Cloud Store account
   - **Main Location Phone Number**—Enter a contact number.

> **Note:** Consider entering an office phone number. This number is used for My Oracle Support (MOS).

2) Choose **Save and Continue**.
The **Service** section displays.

Add Service Details

The **Service** section includes address details.

1) Complete all required fields.
2) (Optional) Select **Make Preferred**.
Select this check box to set this address as the preferred address on file.
3) Choose **Save and Continue**.
The **Billing** section displays.

Add Billing Information

The **Billing** section includes billing address details. If the service and billing address are the same, choose the address and then select **Save and Continue**.

If the billing address is different than the service address:

1) Complete all required fields.

2) (Optional) Select **Make Preferred**.
   Select the check box to set this address as the preferred billing address on file.
3) Choose **Save and Continue**.
   The **Payment** section displays.

View Payment Information

The **Payment** section includes information on Automated Clearing House (ACH) payments. TPM uses ACH to electronically transfer General Contractor funds to Subcontractors.

Choose **Save and Continue**. The **Tax Exemption** section displays.

Update Tax Exemption Status

The **Tax Exemption** section allows new users to declare their company as tax exempt. When selected, Oracle begins an internal review and verification process.

If your company is not tax exempt, choose **Save and Continue**.

If your company is tax exempt:

1) Select the check box.
   Required tax exemption fields display.

> **Note:** Tax exempt customers must complete all fields in order to continue the Oracle Cloud Store process.

2) From the drop-down list, select a tax exempt reason.
3) Upload a tax exemption certificate.
4) Choose **Save and Continue**.
   The **Terms and Conditions** section displays.

Accept Terms and Conditions

The **Terms and Conditions** section includes the terms of usage for Oracle Cloud Services.

Select **Accept** and choose **Save and Continue**. The **Confirm and Place Your Order** page displays.

Confirm and Place Order

The **Confirm and Place Your Order** page shows the information added during the checkout process. Verify all information is correct and choose **Place Order** near the bottom of the page.

- A **Your Order has been placed** page appears, and the Oracle Cloud Store sends an order confirmation to the email address held on file.

  The confirmation includes an order number and a CSI Number.

Keep this Information

Take note of the **CSI Number**. You may need this number for account assistance through My Oracle Support (MOS).

- Once the system processes your order, the TPM application updates with the information you entered on the Oracle Cloud Store. You can now participate in projects by confirming subcontracts.
- Enterprise Administrators in your organization will also receive a confirmation email, stating your organization successfully completed the provisioning process.

  If you do not receive this email within 24 hours of placing your order, contact Oracle Support for help.

This concludes the Oracle Cloud Store setup process.

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Oracle Textura Getting Started on the Oracle Cloud Store and TPM

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