



# Customer Portal

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## 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:

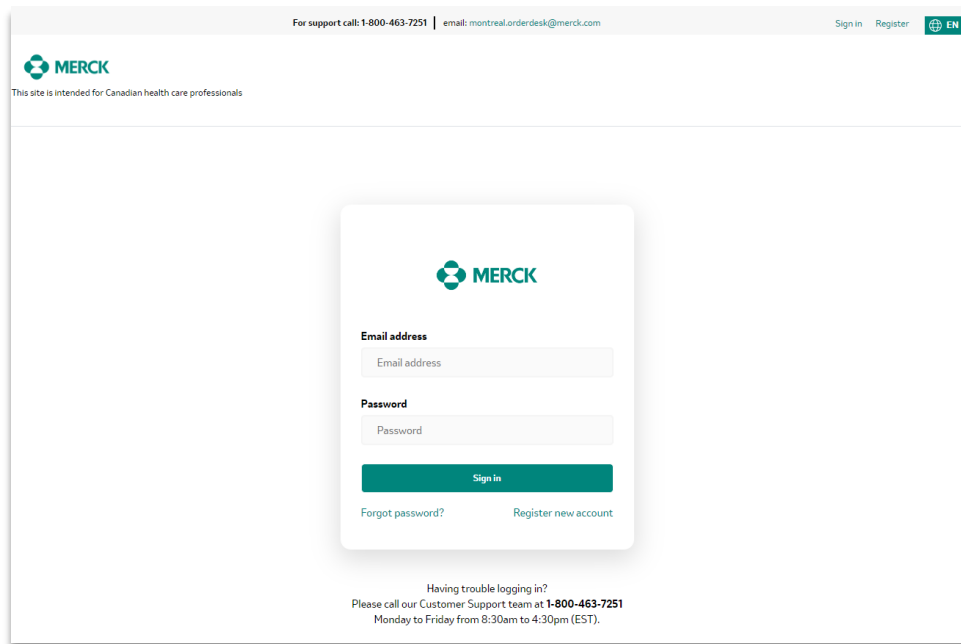
- Filters available.

## Login to the platform

Logging in to the platform is done through the following website:

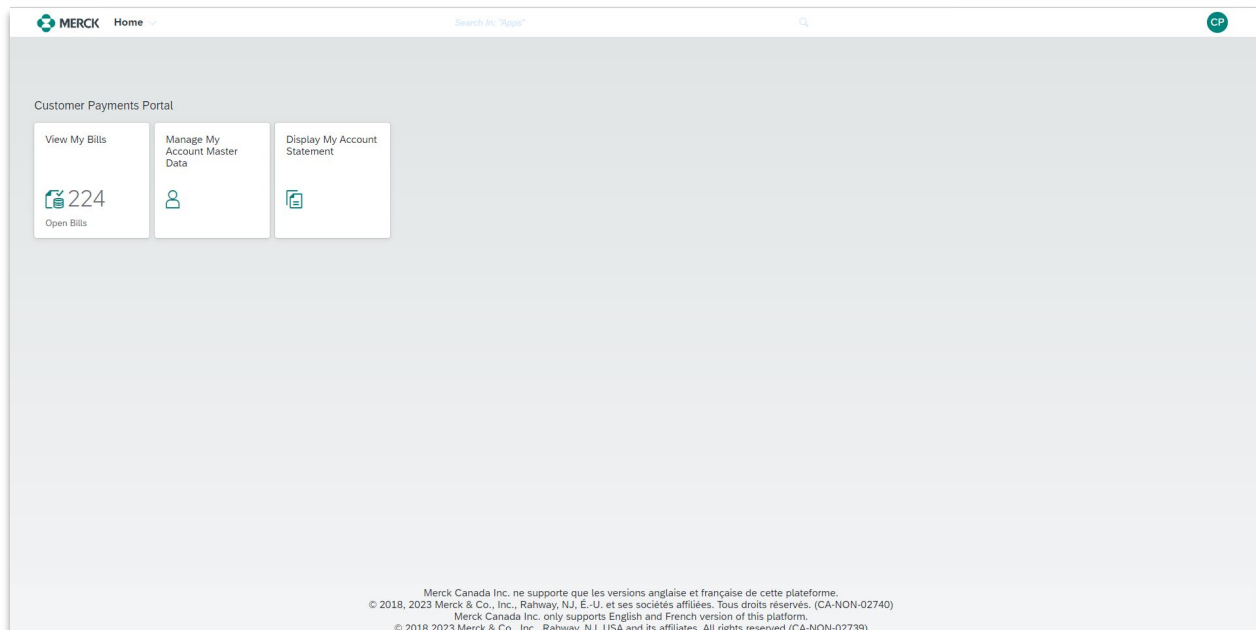
<https://merckorders.ca/login>

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



The screenshot shows the Merck login page. At the top, there is a navigation bar with the Merck logo, support information (1-800-463-7251), an email address (montreal.orderdesk@merck.com), and links for Sign In, Register, and a language selector (EN). Below the navigation bar, a central white box contains the login form. The form includes the Merck logo, an "Email address" input field, a "Password" input field, and a green "Sign in" button. Below the button are links for "Forgot password?" and "Register new account". At the bottom of the page, there is a note: "Having trouble logging in? Please call our Customer Support team at 1-800-463-7251 Monday to Friday from 8:30am to 4:30pm (EST)."

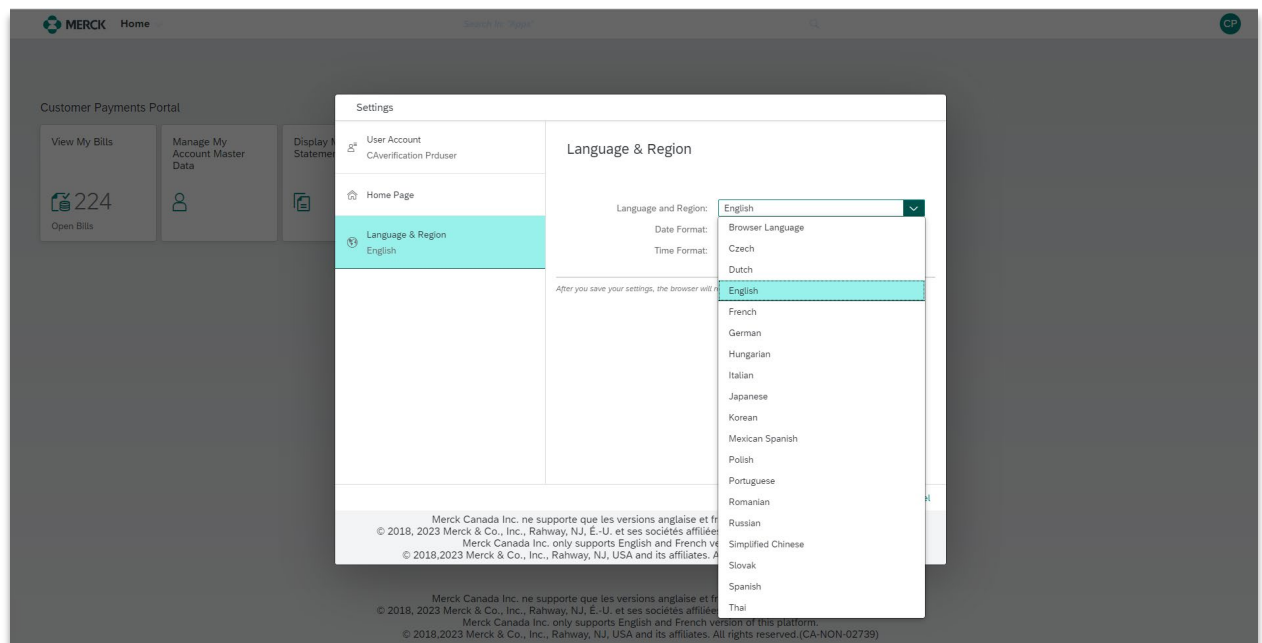
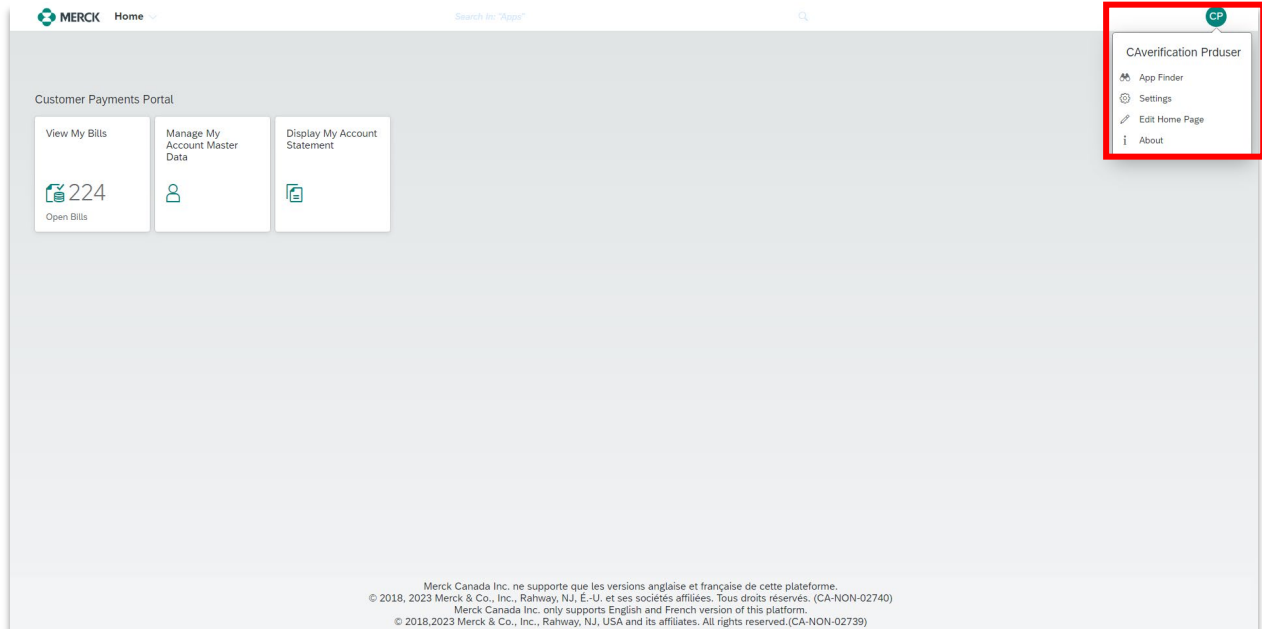
After login, the home page will display the status of your account and different tiles.



The screenshot shows the Merck Customer Payments Portal home page. The top navigation bar includes the Merck logo, "Home", a search bar with the text "Search for 'Apps'", and a user profile icon labeled "CIP". Below the navigation bar, the page is titled "Customer Payments Portal" and features three main tiles: "View My Bills" (with a bill icon and "224 Open Bills"), "Manage My Account Master Data" (with a person icon), and "Display My Account Statement" (with a document icon). At the bottom of the page, there is a footer with copyright information: "Merck Canada Inc. ne supporte que les versions anglaise et française de cette plateforme. © 2018, 2023 Merck & Co., Inc., Rahway, NJ, E-U, et ses sociétés affiliées. Tous droits réservés. (CA-NON-02740) Merck Canada Inc. only supports English and French version of this platform. © 2018, 2023 Merck & Co., Inc., Rahway, NJ, USA and its affiliates. All rights reserved. (CA-NON-02739)".

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

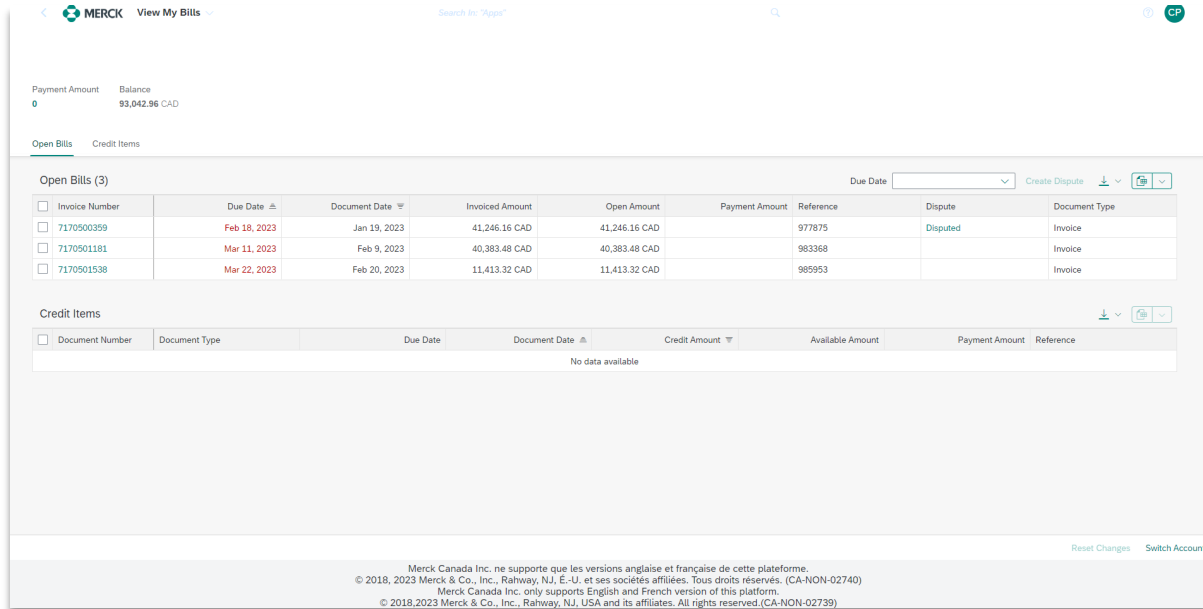
*\*Important: Merck Canada Inc. only supports English and French version of this platform.*



## 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)



Payment Amount: 0 | Balance: 93,042.96 CAD

Open Bills (3)

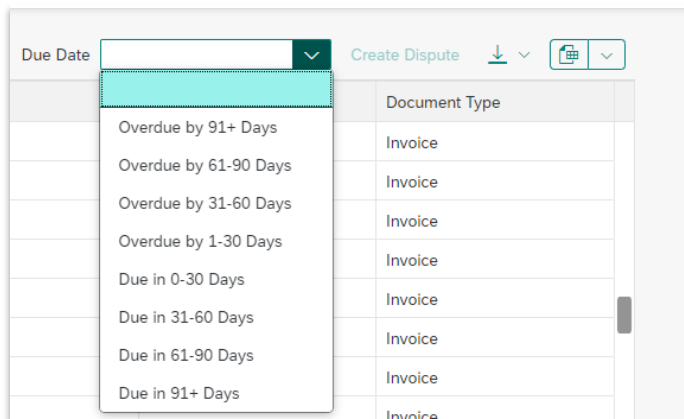
Invoice Number	Due Date	Document Date	Invoiced Amount	Open Amount	Payment Amount	Reference	Dispute	Document Type
<input type="checkbox"/> 7170500399	Feb 18, 2023	Jan 19, 2023	41,246.16 CAD	41,246.16 CAD		977875	Disputed	Invoice
<input type="checkbox"/> 7170501181	Mar 11, 2023	Feb 9, 2023	40,383.48 CAD	40,383.48 CAD		983368		Invoice
<input type="checkbox"/> 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							

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## Options:

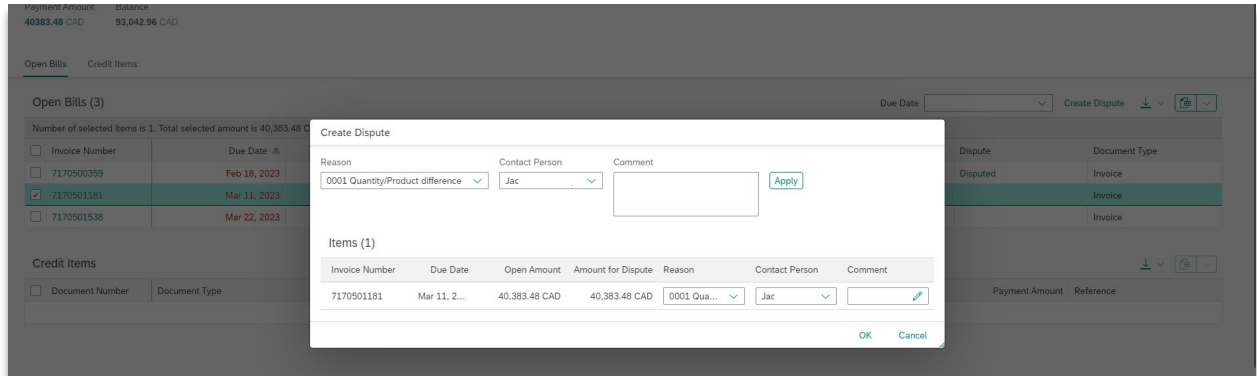


Due Date: Overdue by 91+ Days, Overdue by 61-90 Days, Overdue by 31-60 Days, Overdue by 1-30 Days, Due in 0-30 Days, Due in 31-60 Days, Due in 61-90 Days, Due in 91+ Days

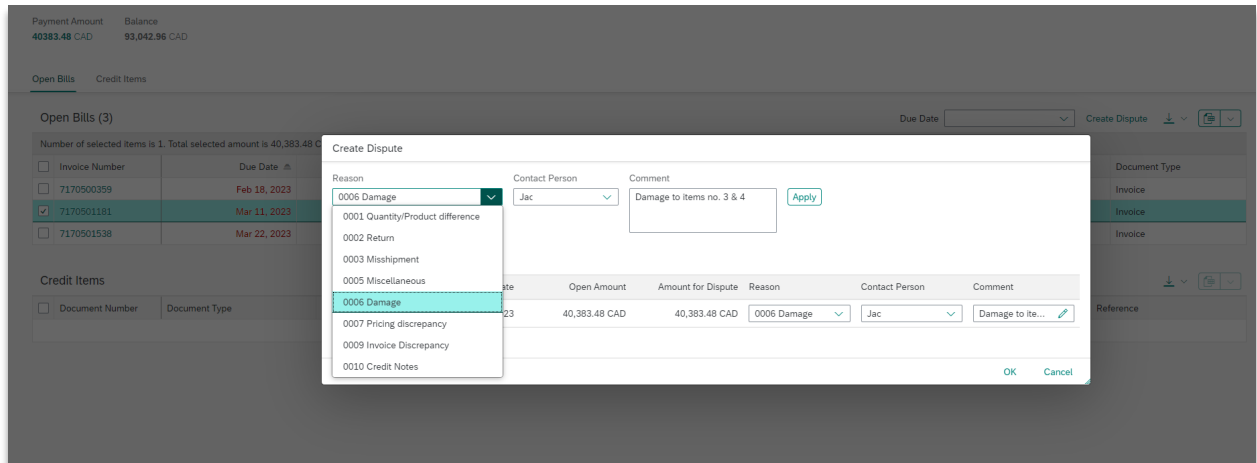
Due Date: You can filter open documents by due date (e.g. Due in 0- 30 days)

**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 **Create 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 be modified line by line



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

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

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”

Invoice : 7170501181 Reference Invoice : 7170501181

Gross Amount	Tax	Net Amount	Status
40,383.48 CAD	0.00 CAD	40,383.48 CAD	Open

Information Items Attachments Dispute

7170501181.pdf

### Dispute

Details for Dispute

Basic Information	Additional
Case ID: 00000589585	Disputed Amount: 40,383.48 CAD
Created On: Sep 12, 2023	Contact Person:
Status: 10 New - PLEASE ASSIGN !	Reference: 7170501181
Cause: 0006 Damage	

Attachments for Dispute

Attachments for Dispute (0)

[Upload](#)

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

Invoice : 7170501181 Reference Invoice : 7170501181

Gross Amount	Tax	Net Amount	Status
40,383.48 CAD	0.00 CAD	40,383.48 CAD	Open

Information Items Attachments Dispute

### Dispute

Details for Dispute

Basic Information	Additional
Case ID: 00000589585	Disputed Amount: 40,383.48 CAD
Created On: Sep 12, 2023	Contact Person:
Status: 10 New - PLEASE ASSIGN !	Reference: 7170501181
Cause: 0006 Damage	

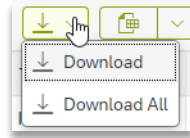
Attachments for Dispute

Attachments for Dispute (0)

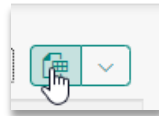
No files found.  
Drop files to upload, or use the "Upload" button.

Next Dispute

**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:

Invoice Details

Invoice : 7170501181 Reference Invoice : 7170501181

Gross Amount	Tax	Net Amount	Status
40,383.48 CAD	0.00 CAD	40,383.48 CAD	Open

Information | Items | Attachments | Dispute

**Basic Information**

Recipient : [REDACTED]

Sender: Merck Canada Inc.

Reference: 983368

P.O. Number: 983368

**Related Dates**


Posting Date: Feb 9, 2023

Payment Baseline Date: Feb 9, 2023

Due Date: Mar 11, 2023

Item	Product Number	Description	Quantity	Unit	Reference	Gross Price	Net Price
10	1009579	EMEND 125MG-R/MAG 3CAP TRIFOLD CAN	24.000	EA	828895260/10	2,505.36 CAD	2,505.36 CAD
20	1008630	JANUVIA 100MG 100TAB CAN	96.000	EA	828895260/20	31,475.52 CAD	31,475.52 CAD
30	1020751	JANUMET 50/1000MG 60TAB CAN	60.000	EA	828895260/30	6,402.60 CAD	6,402.60 CAD

Attachments (1) ↓

 [7170501181.pdf](#)

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.

**Help Topics**

Search Help Topics

What's this app?

**Due Date**  
Indicates the date on which a payment or an invoice is due.

**Invoiced Amount**  
Indicates the original amount of an open bill.

**Open Amount**  
Indicates the amount yet to be cleared.

**Payment Amount**  
Specifies an amount that you want to pay for the open bill.

**Dispute**  
Indicates the dispute status for an invoice.

**Create Dispute**  
Create a dispute for an invoice.

**Download**  
Downloads attachments for the selected open bills.

**Payment Amount**  
Indicates the amount to pay after using credit items.

**Reset Changes**  
Resets all the changes that you have made on the screen.

**Switch Account**  
Enables you to switch to another account.

## 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](mailto:montreal.orderdesk@merck.com)

**INFORMATION**

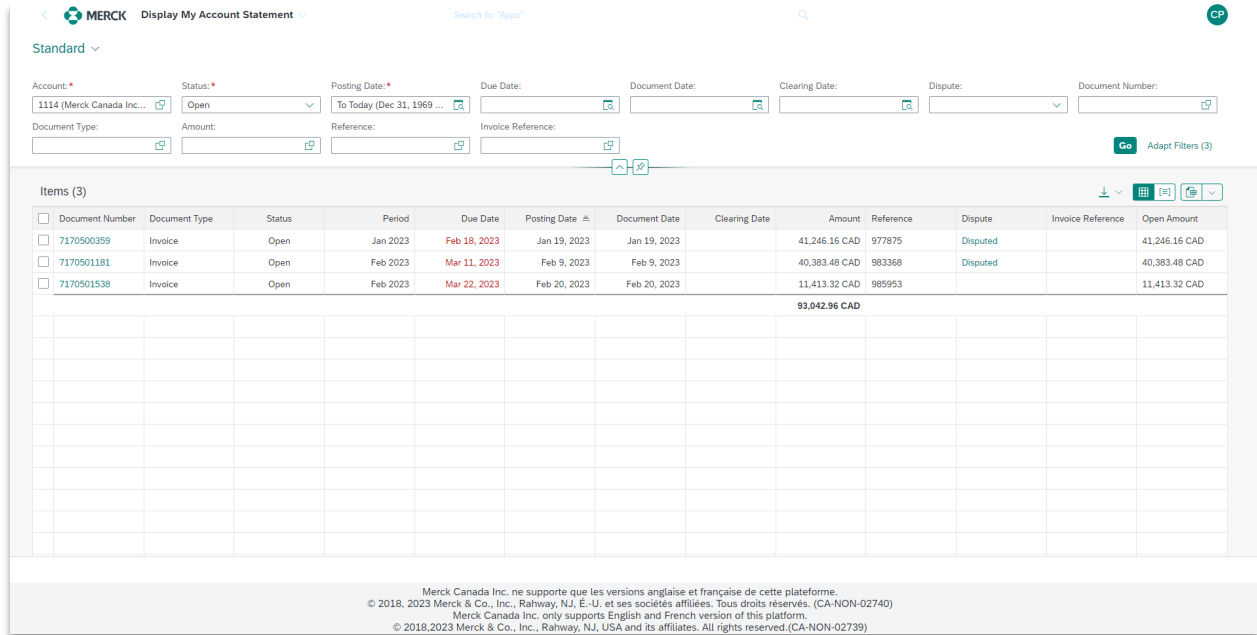
Street Address	P.O. Box Address	Contact
C/O Name: -	P.O. Box: -	Phone Number/Extension: 9 42 10C -
Street Name: ORSESI	Postal Code: -	Fax Number/Extension: -
House Number: 128	Location: -	Email: -
Postal Code: 4X5		
City: RICH		
Country/Region: CA (Canada)		
Region: BC (British Columbia)		
District: -		

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## Display My Account Statement

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



Standard

Account: \* 1114 (Merck Canada Inc...) Status: \* Open Posting Date: \* To Today (Dec 31, 1969... Due Date: Document Date: Clearing Date: Dispute: Document Number:

Document Type: Amount: Reference: Invoice Reference: Go Adapt Filters (3)

Items (3)

<input type="checkbox"/>	Document Number	Document Type	Status	Period	Due Date	Posting Date	Document Date	Clearing Date	Amount	Reference	Dispute	Invoice Reference	Open Amount
<input type="checkbox"/>	7170500359	Invoice	Open	Jan 2023	Feb 18, 2023	Jan 19, 2023	Jan 19, 2023		41,246.16 CAD	977875	Disputed		41,246.16 CAD
<input type="checkbox"/>	7170501181	Invoice	Open	Feb 2023	Mar 11, 2023	Feb 9, 2023	Feb 9, 2023		40,383.48 CAD	983368	Disputed		40,383.48 CAD
<input type="checkbox"/>	7170501538	Invoice	Open	Feb 2023	Mar 22, 2023	Feb 20, 2023	Feb 20, 2023		11,413.32 CAD	985953			11,413.32 CAD
									<b>93,042.96 CAD</b>				

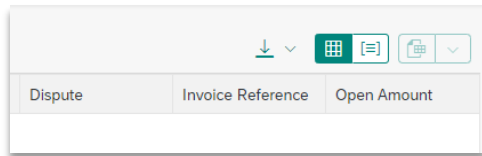
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Options available:

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

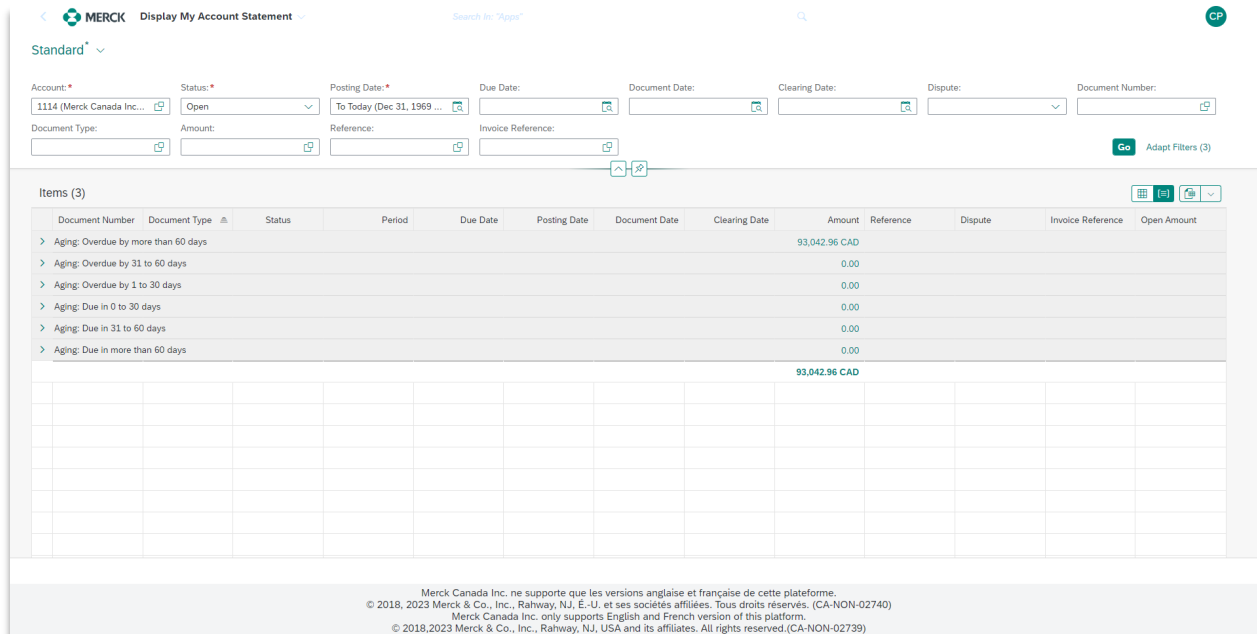
- **Status:** Open, Cleared, All
- **Posting Date:** Date document was posted to account. Choices from the dropdown menu vary by: Single Dates, Date ranges, Months, Years, no Group...
- **Due Date :** Due Date for the payment. Same choices as for “Posting Date” filter
- **Document Date:** Date document 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):



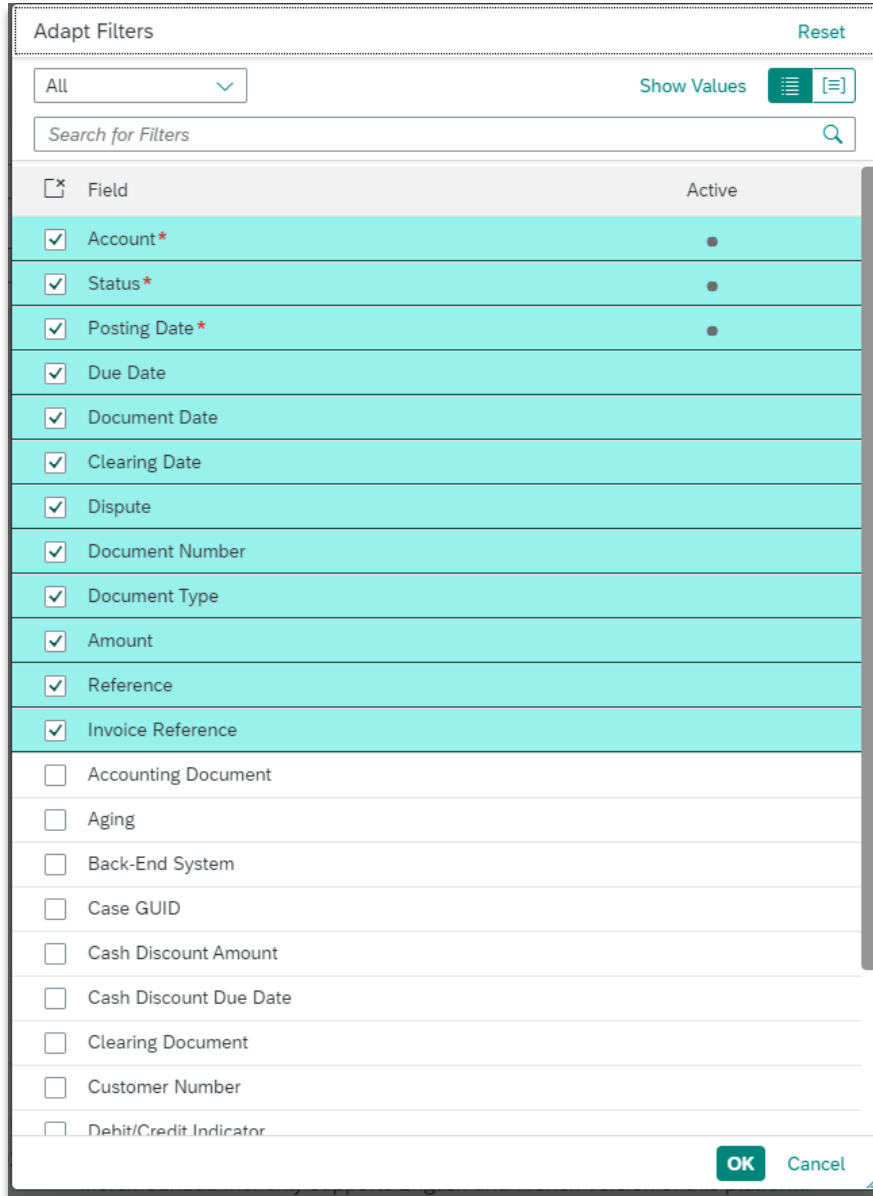
Document Number	Document Type	Status	Period	Due Date	Posting Date	Document Date	Clearing Date	Amount	Reference	Dispute	Invoice Reference	Open Amount
								93,042.96 CAD				
Aging: Overdue by more than 60 days												
Aging: Overdue by 31 to 60 days								0.00				
Aging: Overdue by 1 to 30 days								0.00				
Aging: Due in 0 to 30 days								0.00				
Aging: Due in 31 to 60 days								0.00				
Aging: Due in more than 60 days								0.00				
								93,042.96 CAD				

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

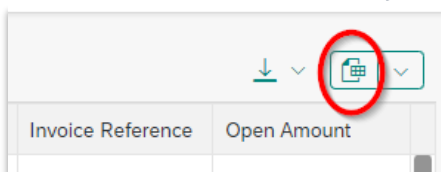
Advanced filters:

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



<input type="checkbox"/> Field	Active
<input checked="" type="checkbox"/> Account*	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> Status*	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> Posting Date*	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> Due Date	<input type="radio"/>
<input checked="" type="checkbox"/> Document Date	<input type="radio"/>
<input checked="" type="checkbox"/> Clearing Date	<input type="radio"/>
<input checked="" type="checkbox"/> Dispute	<input type="radio"/>
<input checked="" type="checkbox"/> Document Number	<input type="radio"/>
<input checked="" type="checkbox"/> Document Type	<input type="radio"/>
<input checked="" type="checkbox"/> Amount	<input type="radio"/>
<input checked="" type="checkbox"/> Reference	<input type="radio"/>
<input checked="" type="checkbox"/> Invoice Reference	<input type="radio"/>
<input type="checkbox"/> Accounting Document	<input type="radio"/>
<input type="checkbox"/> Aging	<input type="radio"/>
<input type="checkbox"/> Back-End System	<input type="radio"/>
<input type="checkbox"/> Case GUID	<input type="radio"/>
<input type="checkbox"/> Cash Discount Amount	<input type="radio"/>
<input type="checkbox"/> Cash Discount Due Date	<input type="radio"/>
<input type="checkbox"/> Clearing Document	<input type="radio"/>
<input type="checkbox"/> Customer Number	<input type="radio"/>
<input type="checkbox"/> Debit/Credit Indicator	<input type="radio"/>

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



Invoice Reference	Open Amount