

Oracle  
**Textura Payment Management**  
**Getting Started With TPM (North America)**

May 2024

# Title and Copyright Information

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Oracle Textura Payment Management Getting Started With TPM (North America)

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# Getting Started With TPM

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As a Subcontractor, you can use Oracle Textura Payment Management (TPM) to help streamline your billing and payment process with your General Contractor.

Refer to this guide for the steps you need to follow to create an account and how to begin to use the TPM application as a Subcontractor in the North American region.

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## Learn About TPM

Read more about the TPM application and how it streamlines the construction process.

## About TPM

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

- ▶ Invoice 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](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](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](https://players.brightcove.net/2985902027001/SyXjZnYeeb_default/index.html?videoId=5982251337001)*** for a view of the General Contractor TPM experience.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting one of the above links will open the page in a new browser tab.

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## Create Your User Account

Before you can use TPM, you need to create an account. Learn about how to begin your account creation process, update your user profile, and set up additional security through the use of two-factor verification.

## Using the Information Email for Subcontractors

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

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

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**Note:** Textura Support or a General Contractor invites a Subcontractor to use TPM. A Textura Support representative, General Contractor, or Prime Subcontractor can invite a Sub-Tier.

### Missing an invitation?

Invitations are sent to the named contact person when your organization is invited to TPM. For further assistance, contact **Textura Support**  
[https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm):

- English: 866-TEXTURA (866-839-8872)
- Français: 855-444-3704
- Español: 855-444-3703

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

You can also read information about the **Invitation Email**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10303395.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303395.htm) in the online help documentation.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting one of the above links will open the page in a new browser tab.

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**Next Step:** *Create a username and password.*

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## Creating a Username and Password

To create a username and password:

- 1) **Navigate to the Create Username Page** (see page 20).
- 2) In the **Username** field, enter a new username you will use to log in to TPM.  
Usernames must adhere to the rules presented on the page. See below for a comprehensive list of rules and recommendations.
- 3) Enter a password.  
Passwords must adhere to the rules presented on the page. See below for a comprehensive list of rules and recommendations.
- 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.

### Password Rules

- ▶ Passwords must contain at least eight (8) characters with at least one letter and one number.  
Recommended:
  - ▶ Mixed Case (upper and lower case letters)
  - ▶ Symbols (i.e !@#%\$^&\*()\_-=~`.,/;:[]{}|\ )
- ▶ Avoid using easily guessed names. The following are rejected:
  - ▶ username (meaning login name)
  - ▶ first name
  - ▶ middle name
  - ▶ last name
  - ▶ city
  - ▶ organization name
  - ▶ oracle
  - ▶ textura
- ▶ Cannot reuse the last five (5) passwords.

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**Note:** Accounts are permanently locked after six (6) failed attempts.

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You can also see more about **creating a username and password** [https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10309321\\_1.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10309321_1.htm) in the online help documentation.

Return to the **Getting Started tasks on the Oracle Help Center** [https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting one of the above links will open the page in a new browser tab.

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**Next Step:** *Create and update your user profile.*

## Updating a User Profile for Subcontractors

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

- 1) **Navigate to the Edit User Page** (see page 20).

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

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- 2) In the **User Information** section, complete all required fields. Required fields are marked with a red asterisk.
- 3) In the **Contact Information** section, complete all required fields. Required fields are marked with a red asterisk.
- 4) Enter a verification phone number.  
See **Setting Up a Verification Phone Number** for the steps to adding a phone number to TPM for two-factor authentication.  
All users must provide a two-step verification phone number to enhance their account security.
- 5) Optional. In the **Notification and Permissions** section, select email and date formatting settings.
- 6) Select each permission you should have on the application.
  - ▶ Only Administrators can assign permissions to other users.
  - ▶ Each organization needs the following permissions assigned to a user at all times:
    - Manage Projects
    - Manage Compliance
    - Sign on Behalf of Company.
  - ▶ If you change user roles or permissions after creating the user profile, you will receive an email about the change.

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**Note:** For more information on additional available user roles and permissions, see the following topics in the online help:

- **User Roles for Subcontractors**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10311321.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10311321.htm)
- **User Permissions List for Subcontractors**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10304737.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10304737.htm)

Selecting a link will open the help page in a new browser tab.

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- 7) 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 Virginia 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***

***[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10303391.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303391.htm)*** topic for more information. Selecting this link will open the help topic in a new browser tab.

- 8) If the project uses consent forms, read the attached data collection consent form and select the check box to signify acceptance of the policy.
- 9) Select **Save Profile**.
- 10) When prompted, choose how you wish to receive a code to your verification phone number.
- 11) In the **Enter Security Code** dialog box, enter the code and select **Continue**.
- 12) Select **Close** to close the dialog box.

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

You can also see more about ***updating a user profile***

***[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10311320.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10311320.htm)*** in the online help documentation.

Return to the ***Getting Started tasks on the Oracle Help Center***

***[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm)***.

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**Note:** Selecting one of the above links will open the page in a new browser tab.

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**Next Step: *Update your organization profile.***

## Setting Up a Verification Phone Number

Enable a verification phone number on Oracle Textura Payment Management regardless of your role to better protect your account from unauthorized password changes. Additionally, having a verification phone number will provide the ability to retrieve your username.

It is recommended that you use a phone that supports SMS for your verification phone number so that you can receive SMS notifications from the system.

For more information on security best practices, see the ***Security Best Practices for Subcontractors***

***[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10312038.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10312038.htm)*** section in the online help documentation. Selecting this link will open the topic in a new browser tab.

To set up a verification phone number:

- 1) ***Navigate to the Edit User Page*** (see page 20).
- 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.
  - ▶ The application will save the phone number and will only show only the last four digits.
  - ▶ The application sends a 7-digit security code to your phone via text message (SMS), voice call.
  - ▶ An **Enter Security Code** dialog box appears.
- 5) In the **Enter Security Code** dialog box, enter the security code and then select the **Continue** button.

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**Note:** If you are adding a verification phone number while setting up your account for the first time, return to the **Updating a User Profile for Subcontractors** help page in this guide to for further help with your setup process.

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Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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## Update Your Organization Profile

Set up your organization profile to add or update business, diversity status, tax ID, banking, and consent form details.

### Updating the Organization Profile for Subcontractors

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

- 1) **Navigate to the My Organization Profile Page** (see page 20).

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**Notes:**

- This page will display automatically as a part of the account setup process.
  - Only Enterprise Administrators can edit an organisation. If you are the first user in your organisation, you are an Enterprise Administrator by default.
- 

- 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.

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**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.

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- 4) Optional. Add a Diversity, Equity, and Inclusion (DEI) value. Select the **Manage Values** button to open a dialog box. See the **Submitting your Organization's Diversity Values** [https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10317092.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10317092.htm) topic for more information on how to complete this step.
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**Note:** Selecting the above link will open the topic in a new browser tab.

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- 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. See our online help to **learn about how to protect your bank account information** [https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10312041\\_1.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10312041_1.htm). Selecting the link will open the topic in a new browser tab.
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**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.

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- 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.

You can read more about **your organization profile** [https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10303356.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303356.htm) in the online help documentation. The help documentation includes additional topics about all available fields and banking information found on the **My Organisation Profile** page.

Return to the **Getting Started tasks on the Oracle Help Center** [https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting one of the above links will open the page in a new browser tab.

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**Next Step:** *Choose organization settings.*

## 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. If you do not need to choose organizational settings, continue to the **About the Oracle Cloud Store Registration Email** step in this guide.

To edit your organization settings:

- 1) **Navigate to the My Organization Settings Page** (see page 20).
- 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](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](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](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](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10313849.htm) topics.

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**Note:** Selecting one of the links above will open the topic in a new browser tab.

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- 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.

You can read more about your **organization settings**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10313822.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10313822.htm) in the online help documentation. The help also includes topics on additional settings not mentioned in this guide.

Return to the **Getting Started Tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting one of the above links will open the page in a new

browser tab.

**Next Step: Use the Oracle Cloud Store email to begin your Oracle cloud Store Registration.**

## Purchase TPM from the Oracle Cloud Store

In order to use TPM, you need to first create and register an Oracle Cloud Store Account.

### About the Oracle Cloud 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.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

**Note:** Selecting the above link will open the page in a new browser tab.

**Next Step: Adding TPM to your cart on the Oracle Cloud Store.**

### Adding TPM to Your Oracle Cloud Store 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) From the **Oracle Cloud Store** page for Oracle Textura Payment management, 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) From the top of the page, select the **Cart Icon**.  
The store navigates to the **Your Shopping Cart** page.
- 3) Optional. Select the **Show Rate Card Details** link to see how costs are determined within TPM.

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**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.

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4) Select **Checkout**.

The page reloads and displays a **Checkout** message.

5) From the **Checkout** message, select the **New User** button. The Oracle Cloud Store navigates to a **Create an Oracle Account** page.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: *Creating an Account on the Oracle Cloud Store.***

## Creating 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 your contact and password details.

- ▶ First Name
- ▶ Last Name
- ▶ Email Address

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

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- ▶ Password
- ▶ Retype Password
- ▶ Country.

2) Optional. Choose to receive Oracle product emails.

Select the check box to receive emails about Oracle products, services, and events

3) Create an account.

Select 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 your 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.

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Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step:** *Continue the checkout process to purchase TPM.*

### Continue Checkout Process

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

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step:** *Add additional information.*

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### Adding 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.

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**Note:** Consider entering an office phone number. This number is used for the Oracle Support Portal.

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- 2) Select **Save and Continue**.  
The **Service** section displays.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step:** *Add service details.*

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### Adding 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.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: Add billing information.**

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### Adding 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.

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: View payment information.**

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### Viewing Payment Information

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

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

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: Update tax exemption status.**

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### Updating 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.

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

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

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: Accept the terms and conditions.**

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### Accepting Terms and Conditions

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

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

Return to the **Getting Started tasks on the Oracle Help Center**  
[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step: Confirm and place your order for TPM.**

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### Confirming and Placing Your Order for TPM

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.

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#### Keep this Information

Take note of the **CSI Number**. You may need this number for account assistance.

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- ▶ 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** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm) for help.

This concludes the Oracle Cloud Store setup process.

Return to the **Getting Started tasks on the Oracle Help Center** [https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

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**Note:** Selecting the above link will open the page in a new browser tab.

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**Next Step:** *Confirm your contract to participate in a project.*

## Participating in a Project

Once a Head Contractor creates a project and invites your organisation to participate on TPM, you will need to accept a subcontract.

Return to the **Getting Started tasks on the Oracle Help Centre** [https://docs.oracle.com/cd/E97085\\_01/10315506.htm](https://docs.oracle.com/cd/E97085_01/10315506.htm).

## Confirming a Contract for Subcontractors

To participate as a Subcontractor in a project on the system, you must confirm the contract.

### Missing an invitation?

Only administrators can confirm contracts. If you have not received an invitation, log in to Textura here to see if you were assigned a project task. This is helpful if you elected not to receive email notifications. You can request for your General Contractor to resend the invitation. For further troubleshooting, contact **Oracle Support** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm).

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To confirm a contract:

- 1) **Navigate to the Confirm Contract Page** (see page 20).
  - 2) On the **Confirm Contract** page, review your contract information.
- 

### Notes:

- The usage fee for this project is displayed and will be taken from your bank account or charged to your credit card once you choose **Confirm**.
- You cannot accept a contract if your country location does not match the country where the funding organization's bank is located. If you cannot accept the contract for this reason, contact **Oracle Support** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm). You will need to create a new organization on Textura with banking information in the country of the project in which you are participating to accept the contract.
- Oracle does not allow Subcontractor usage fees to be paid by check.

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Before your contract can be accepted or completed, you must update your organization profile to select a different payment method.

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- 3) Select **Confirm**. The usage fee is immediately collected, and a **Status** page indicates the contract has been confirmed.

## Tips

### ▶ **Contract Signatory**

Some projects will require contact information for the person who signed the contract. If the fields are on the **Accept TPA Enrollment** screen, fill them in before choosing to **Accept** or **Ask Again Later**. The **Contract Signatory** section includes the following fields:

- ▶ **First Name**
- ▶ **Last Name**
- ▶ **Phone Number**
- ▶ **Email Address**

### ▶ **Missing Change Orders**

You can confirm the contract and contact the General Contractor or Prime Subcontractor to ask about change order status.

### ▶ **Invoicing**

You must confirm the contract before submitting an invoice.

You can also read about **Confirming a Contract**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10311323.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10311323.htm) in the online help documentation.

This concludes your account setup process. For more help with using TPM, see our **online help documentation**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10308705.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10308705.htm). View the **Help System**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/North\\_America/10314495.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10314495.htm) topic to learn how to use the online help while using the TPM application.

Return to the **Getting Started tasks on the Oracle Help Center**

[https://docs.oracle.com/cd/E97085\\_01/10313887.htm](https://docs.oracle.com/cd/E97085_01/10313887.htm).

## More Information

Once you set up your account, you are ready to use TPM for all your payment and lien waiver needs. Refer to our documentation, FAQs, and videos for guidance whenever you need help. We also have top-tier support options including a customer support number, in-app communication, and a centralized support center.

- ▶ **Textura Payment Management Help Welcome Page**  
[https://docs.oracle.com/cd/E97085\\_01/10313806.htm](https://docs.oracle.com/cd/E97085_01/10313806.htm)
- ▶ **Frequently Asked Questions (FAQs)**  
[https://docs.oracle.com/cd/E97085\\_01/10312776.htm](https://docs.oracle.com/cd/E97085_01/10312776.htm)
- ▶ **Videos** [https://docs.oracle.com/cd/E97085\\_01/10313807.htm](https://docs.oracle.com/cd/E97085_01/10313807.htm)
- ▶ **Support for North America** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm)

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**Note:** Selecting one of the links above will open the link in a new browser tab.

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## Navigation Topics

### Navigate to the Create Username Page

Use the link from your invitation email.

#### Missing an invitation?

Invitations are sent to the named contact person when your organization is invited to TPM. For further assistance, contact **Oracle Support** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm):

- English: 866-TEXTURA (866-839-8872)
  - Français: 855-444-3704
  - Español: 855-444-3703
- 

### Navigate to the Edit User Page

When setting up an account, the **Edit User Profile** page displays immediately after you create a username and password.

- ▶ To change your own profile, choose **Edit My Account** under your username at the top of any page.
- ▶ To change another profile, access this page through the **Edit** link on the **Browse Users** page.

### Navigate to the My Organization Profile Page

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

### 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.

### Navigate to the Confirm Contract Page

You can reach the **Confirm Contract** page three ways:

- ▶ From the **Accept Participation** email, use the link
- ▶ From the **Tasks** page, choose **Confirm Contract**
- ▶ Under **Project Actions** on the **Project Home Page**, choose **Confirm Contract**.

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**Note:** Multiple **Confirm Contract** tasks group beneath a collapsed category header. Choose the **Show Confirm Contract** header to show all available tasks.

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