SUPPLIER PORTAL MANUAL

ORACLE

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Oracle Procurement Supplier Portal Cloud is an application that helps organizations to interact and communicate with their suppliers. This manual guide will help suppliers to effectively utilize the Oracle Fusion Supplier Portal to enhance their business operations and foster a productive relationship with buying organization.

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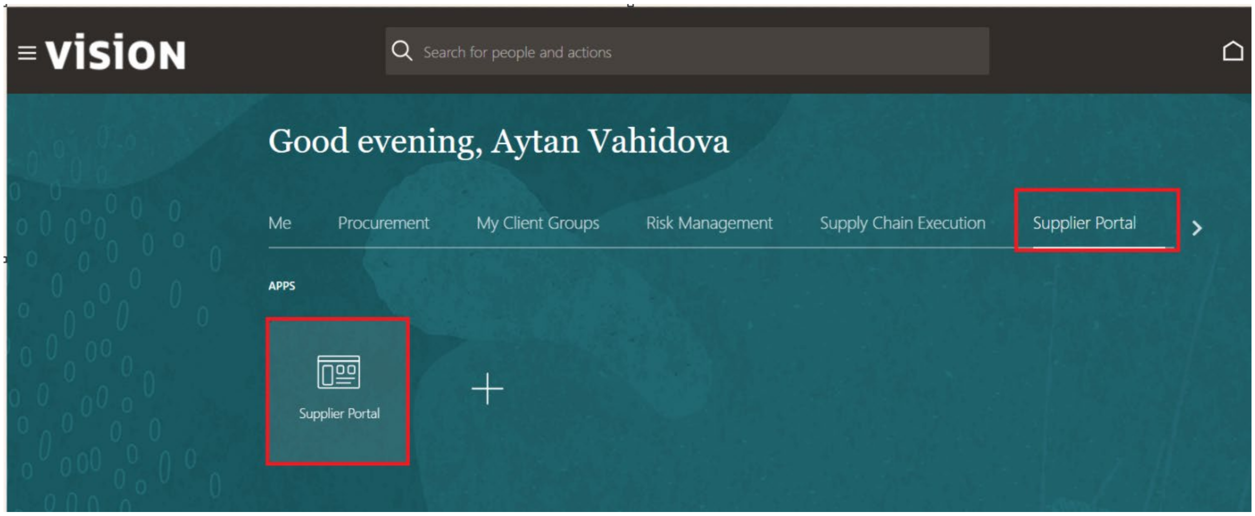
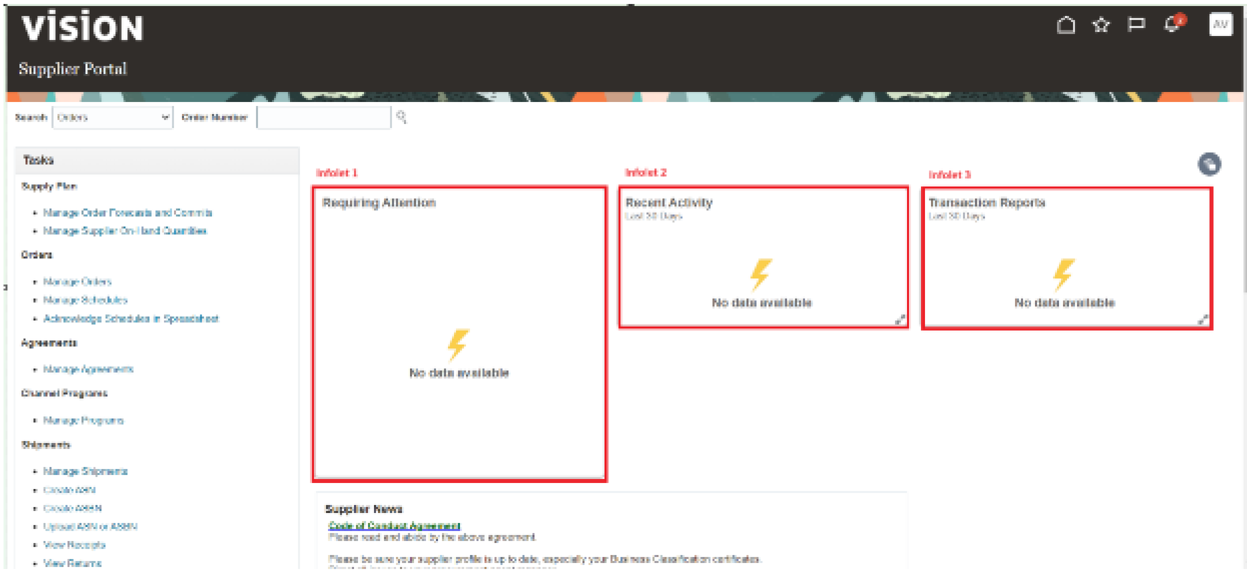
Supplier Portal Landing Page

Login to Fusion Application with supplier username and password. Select Supplier Portal from Home Page to open Supplier Landing Page:



The landing page of the supplier portal application provides access to **tasks** and **infolets** for quick analysis and action by supplier.

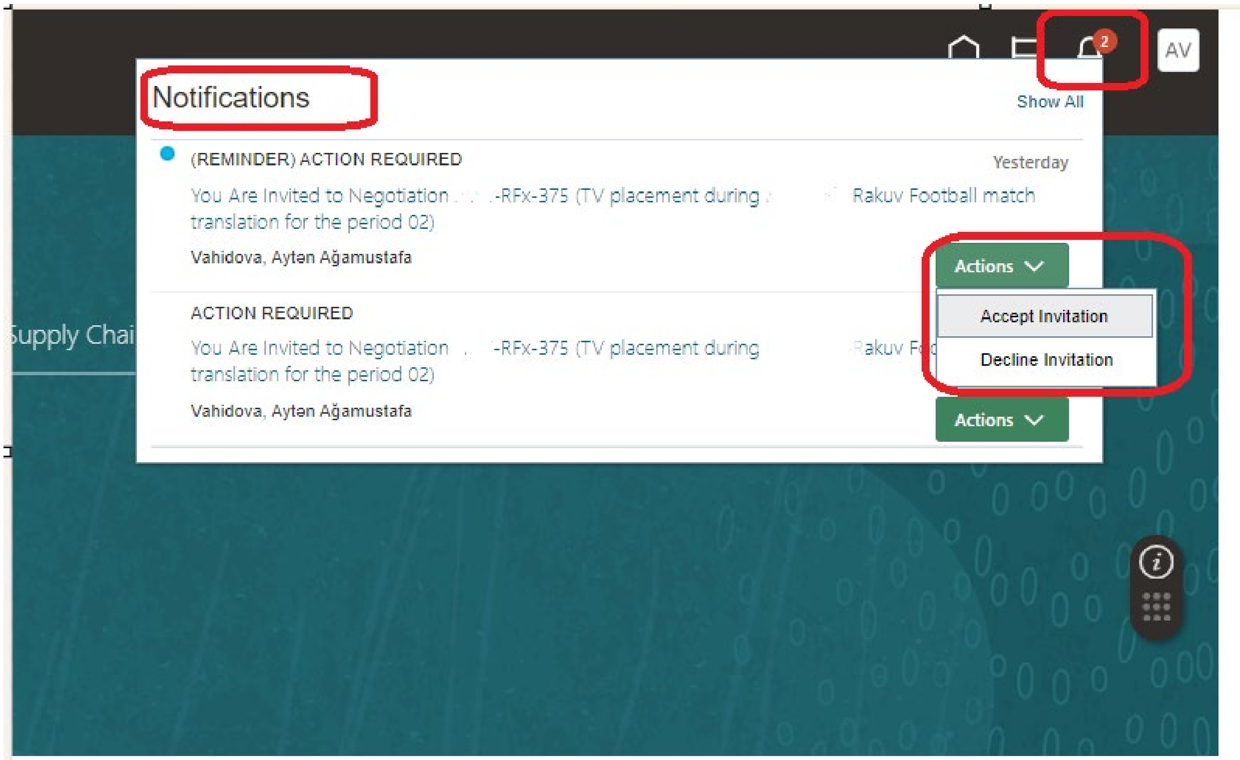
Below screenshot shows supplier portal infolets from the application. These infolets sum up information about key transactions **requiring attention**, **recent activity** of the last 30 days, and **transaction reports**.



Manage Supplier Notifications

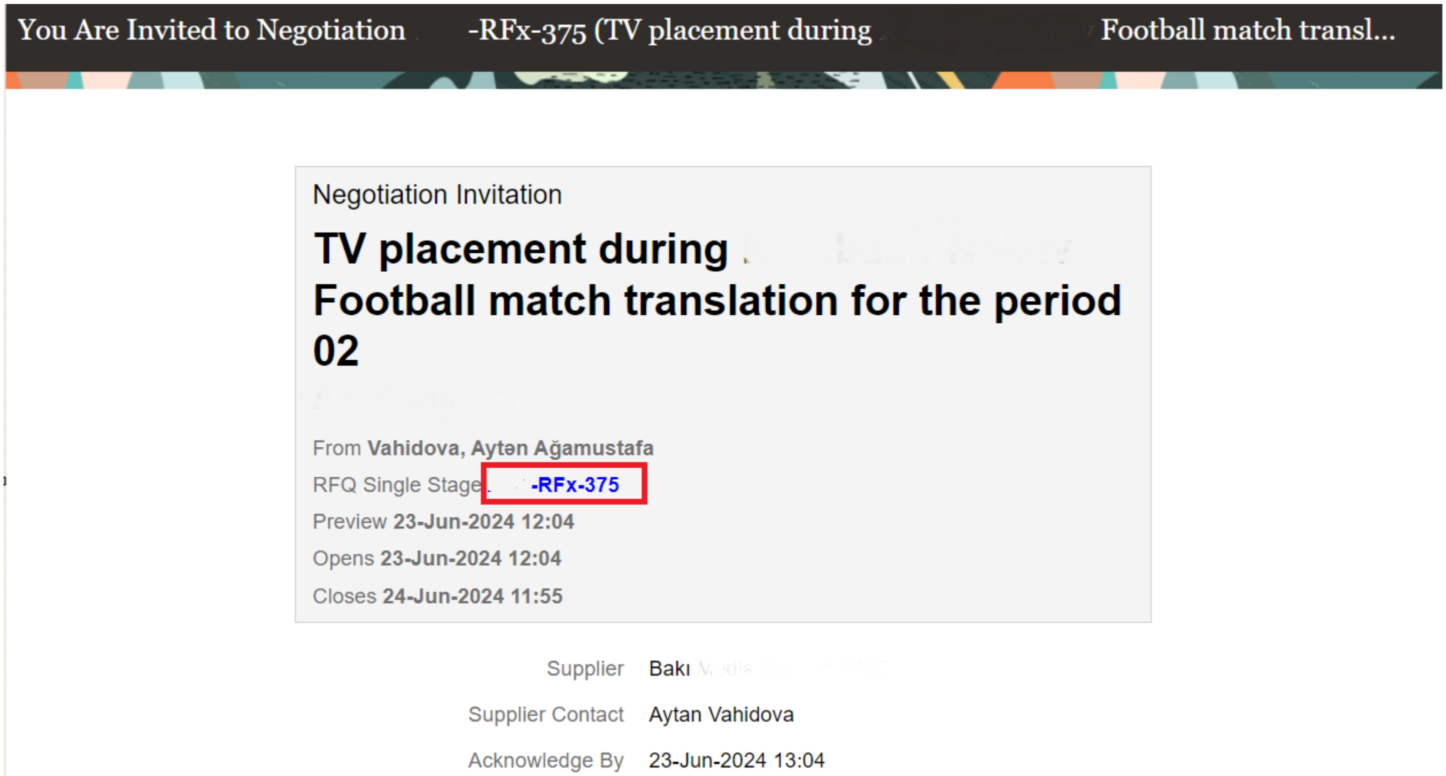
At the top right corner of the home page, a bell icon will display your pending notifications. This includes new purchase orders pending acknowledgement as well as invitations to a negotiation.

Note: Clicking on the notification brings you to the PO or Negotiation in question. Supplier can Accept/Reject notification right from the Bell icon notification.



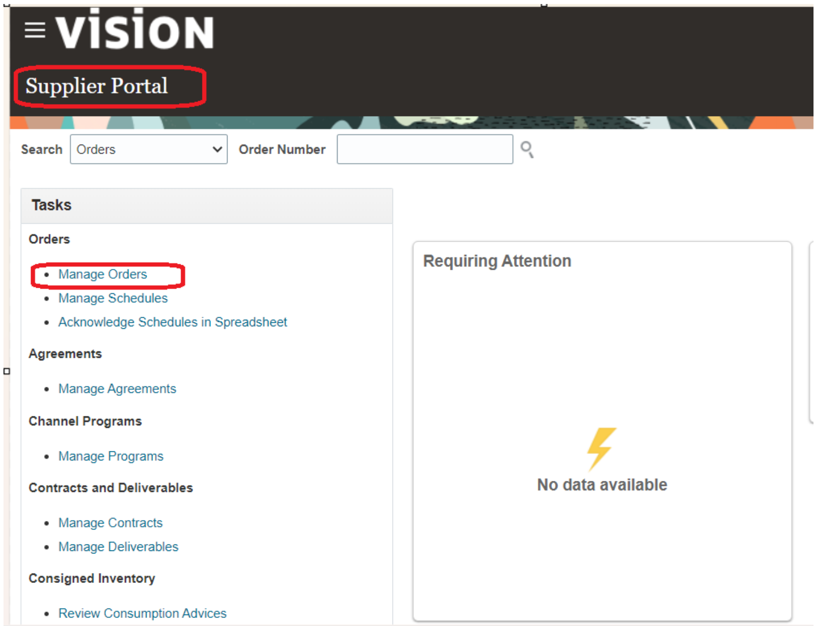
The other way is supplier can to click on notification to create a response to Negotiation Invitation. You can accept/reject invitation inside the notification as well. You can see Negotiation number. Click on Negotiation number to create a response for invitation.

Note: This is one of the options how to create response from negotiations. You will see another way of how to create a response from <View Active Negotiations> tab in Manage Negotiation section of this guideline.

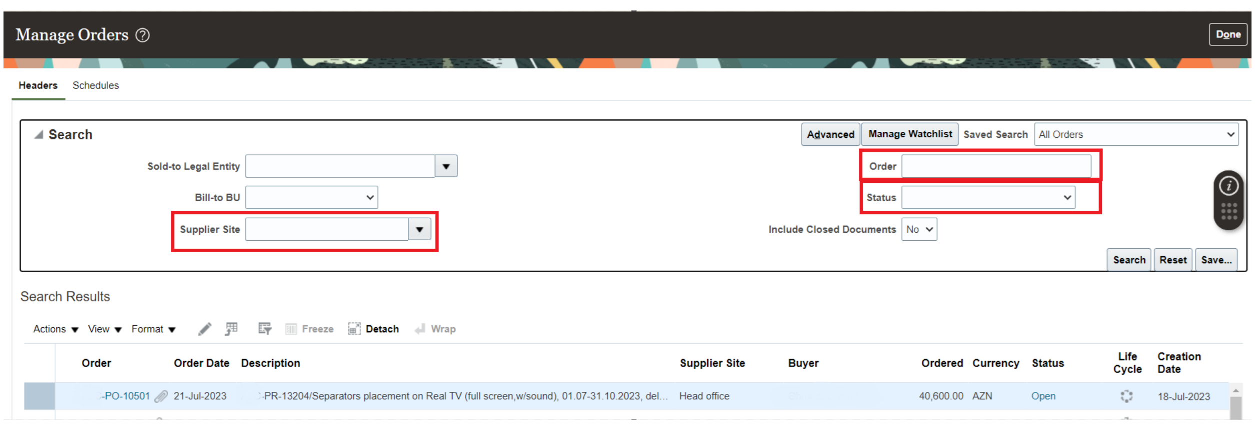


Manage Purchase Order

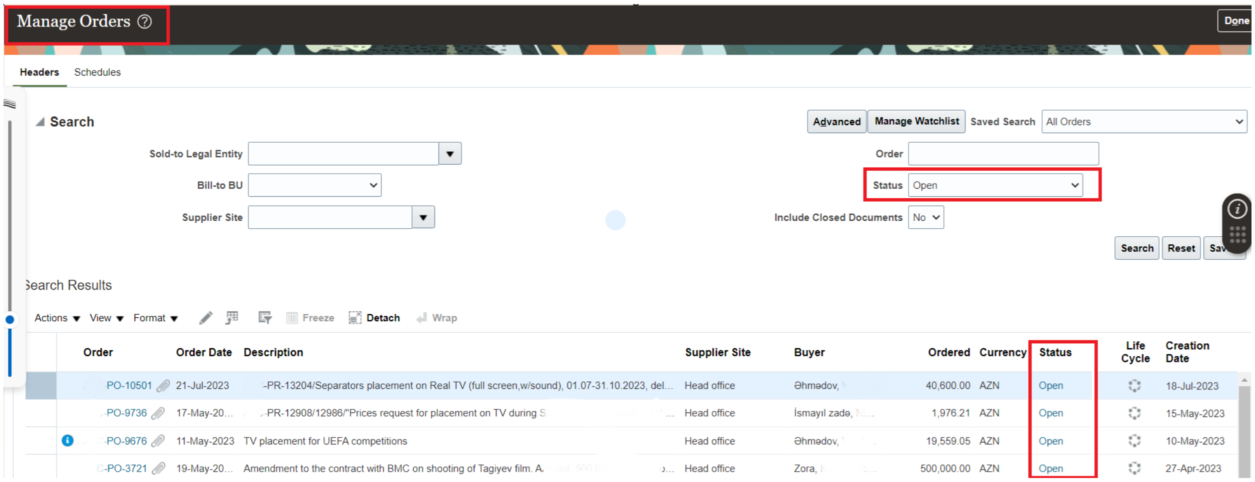
When the company purchasing team enters a Purchase Order (PO), suppliers are able to view and edit the order through the **'Manage Orders'** area within the Supplier Portal. Select 'Manage Orders' from the Supplier Portal Homepage.



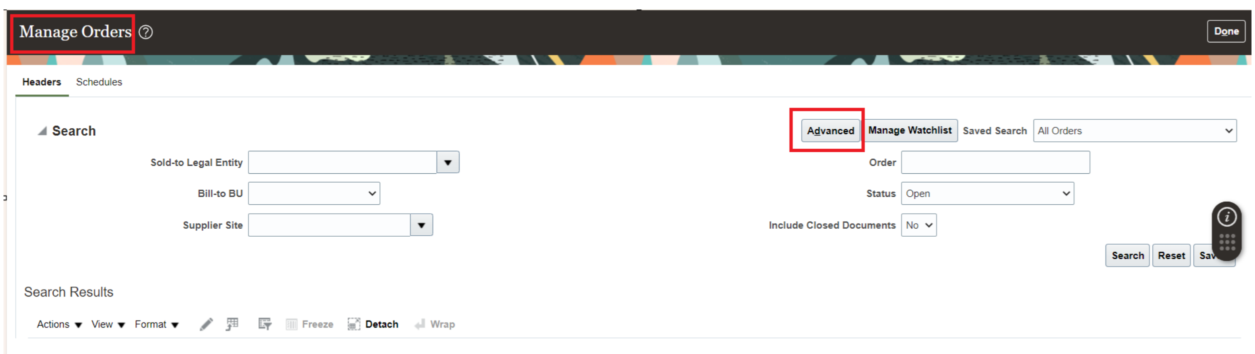
You will arrive at the search page as shown below. You can narrow down your search using the search parameters in the header area of the screen. You can search by the Order Number, Status or Supplier Site.



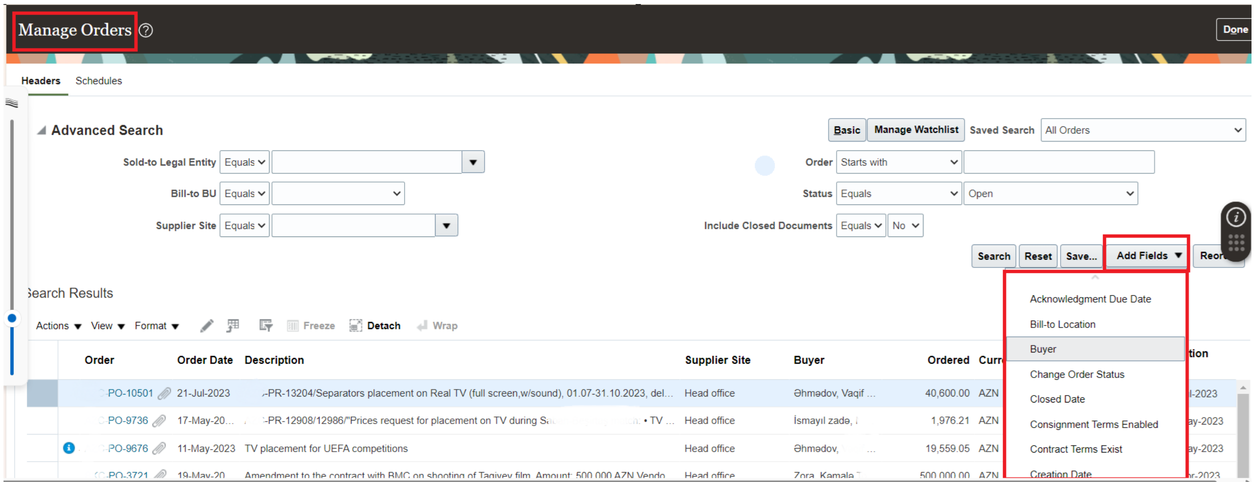
You can filter PO queries by status. By selecting any status, the search results will display orders holding that status.



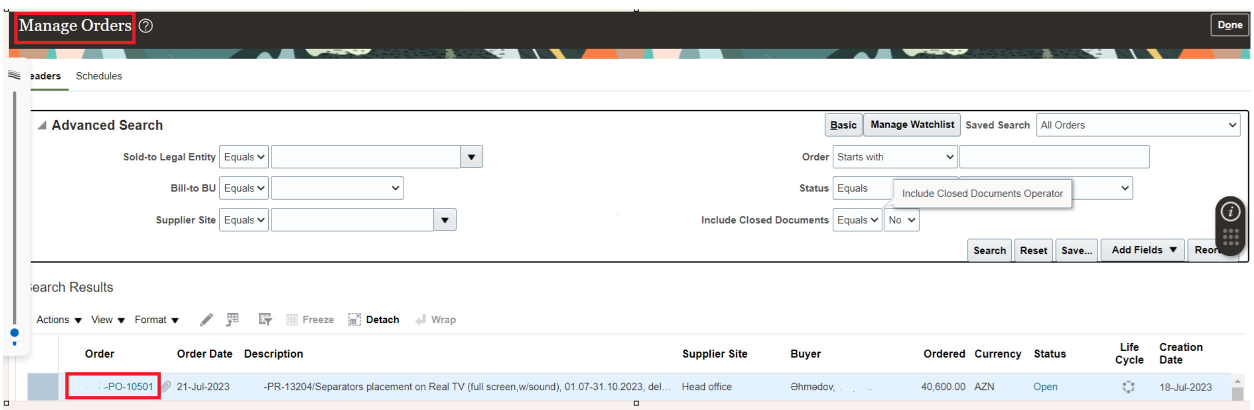
You can add more fields or search using more parameters by using the advanced search. Click on Advanced button.



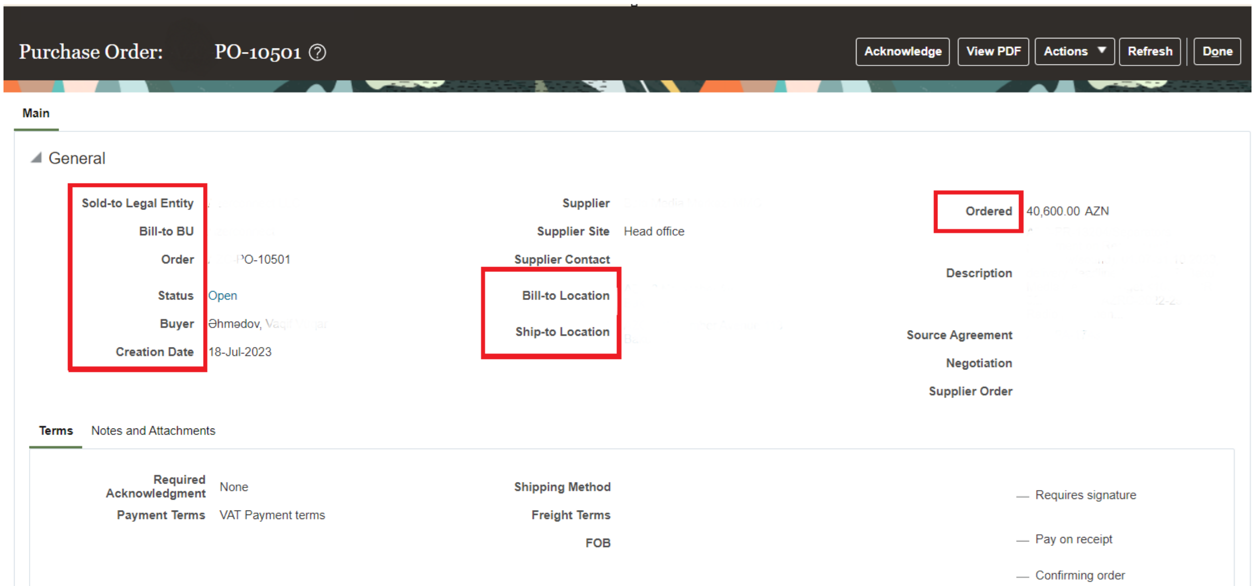
You can also add fields in the search parameters by clicking on ‘Add Fields’ and selecting any of the search parameters suitable for you.



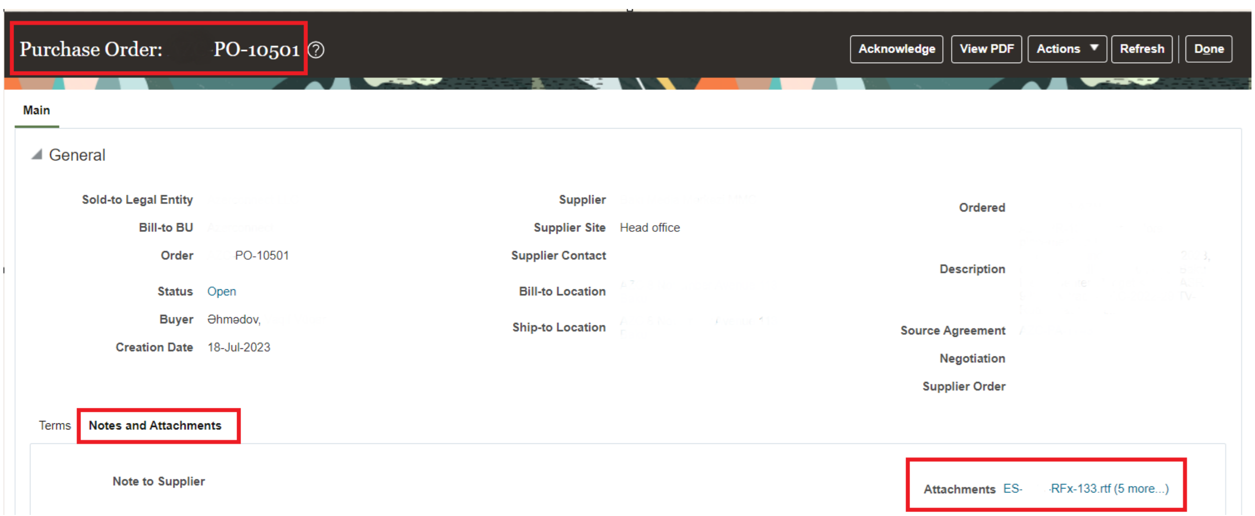
You can open the Purchase Order by clicking on the Purchase Order Number. Click on Purchase Order Number in the search results page to view the Purchase Order.



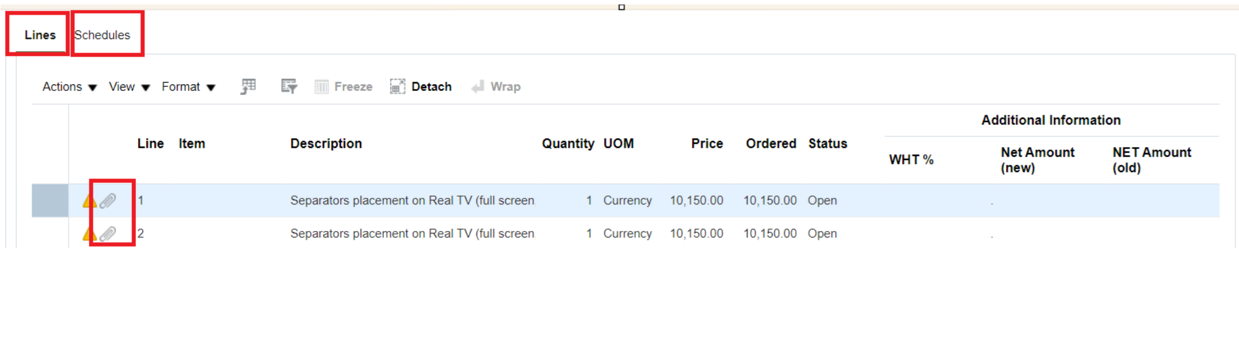
You can view Purchase Order Header details such as ‘Sold to Legal Entity’, ‘Bill to Business Unit’, ‘Purchase order number’, ‘Purchase Order Status’,‘Buyer’, ‘Ship-to & Bill-to Location’, ‘Ordered Amount’, etc.



In Terms and Conditions, you can view details. You can also view any notes or attachments.



You can view line level details from Lines tab. At the Line Level, you can view any Attachments using the triangle to expand the View tab. You can also view Schedule details from Schedules tab as well.



If you click "Actions" a drop-down menu appears where you can choose the following options:

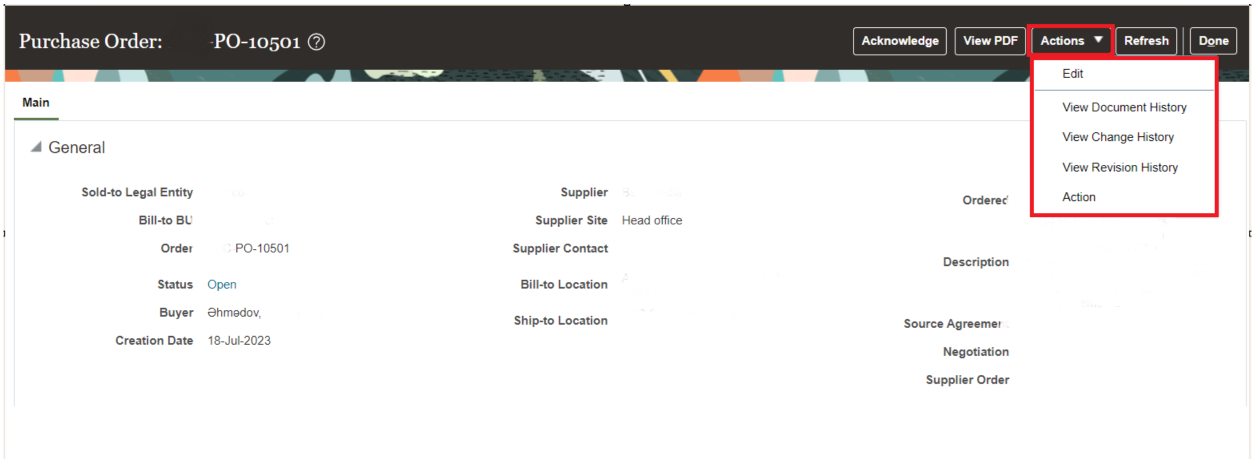
Edit: If you have access, you can edit Purchase Orders here. This will create a change order.

Cancel Document: Here you can cancel the document. (It is not in below screenshot because we have disabled it for suppliers for our company, but normally suppliers are able to cancel the document)

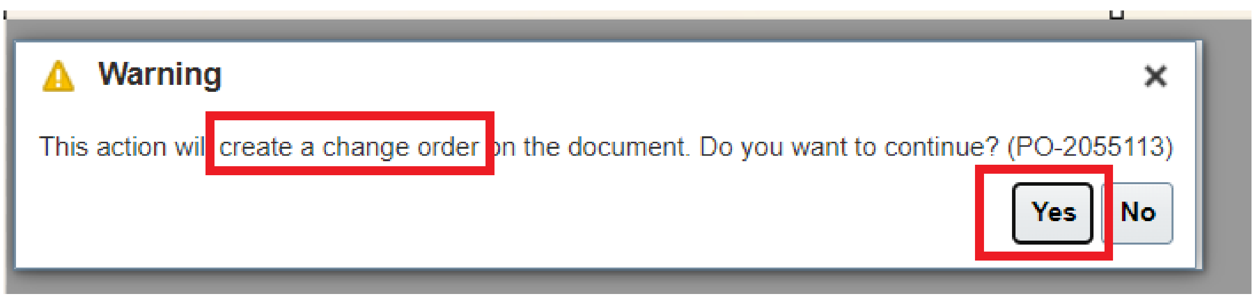
View Document History: Here you can view the document history.

View Change History: Here you can view the change order history of the document.

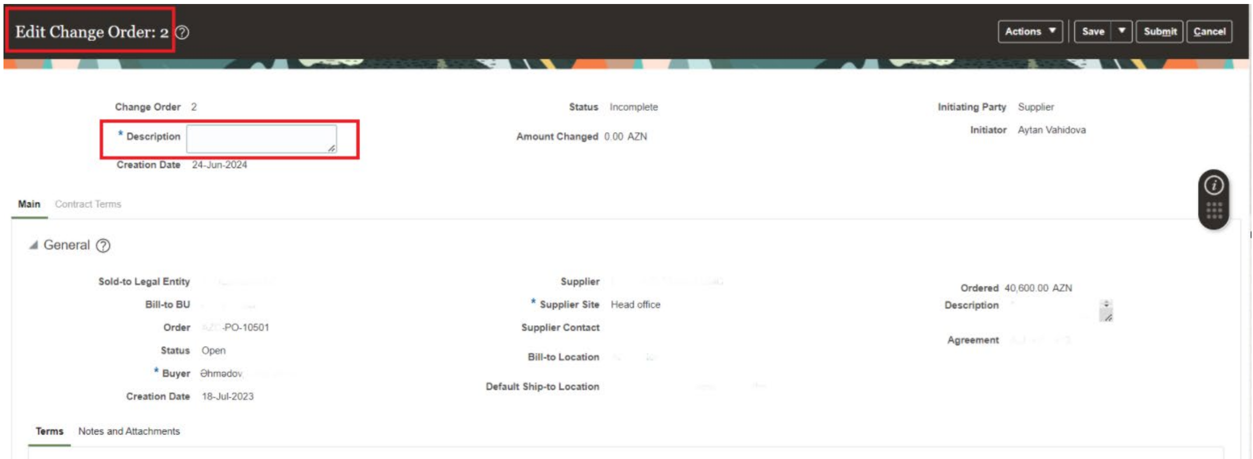
View Revision History: Here you can view revisions made in the document.



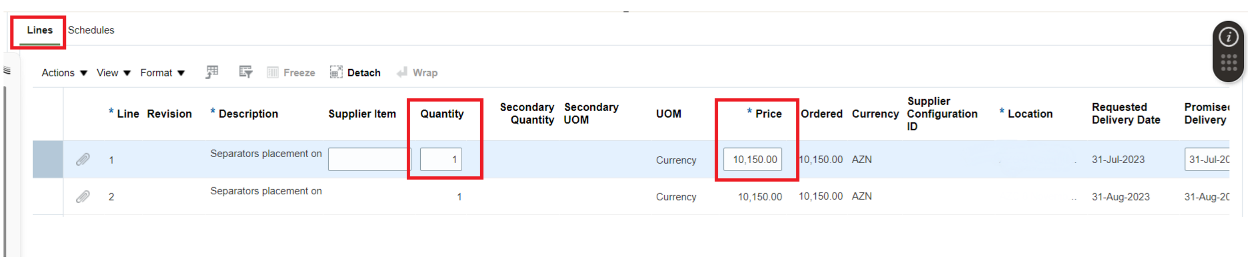
Select Edit to make changes to the PO. This will create a change order. After clicking the Edit button, you will be asked for confirmation to create a **Change Order**. Click Yes to create a change order.



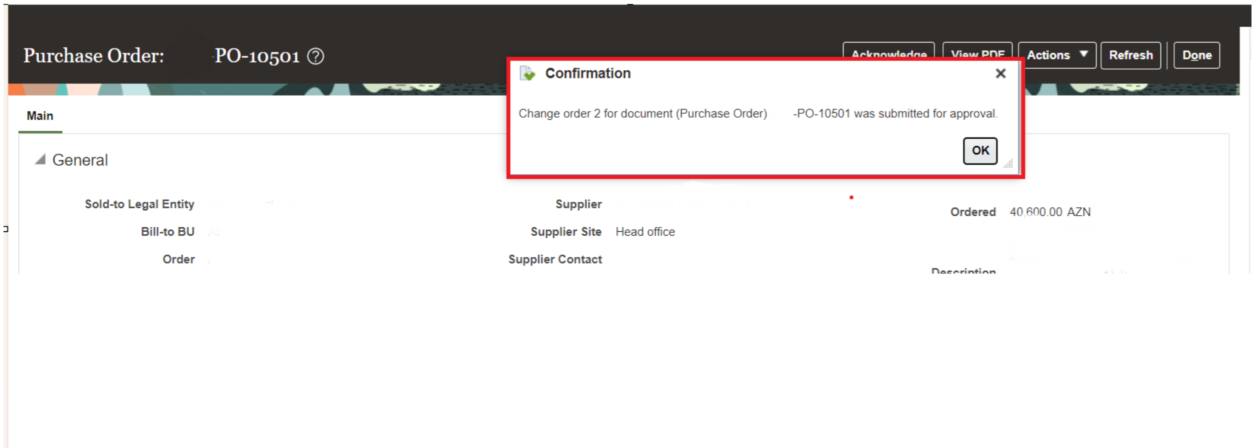
You will now be in the “Edit Change Order” screen. Mandatory fields are marked with *. You will need to enter the description of your change.



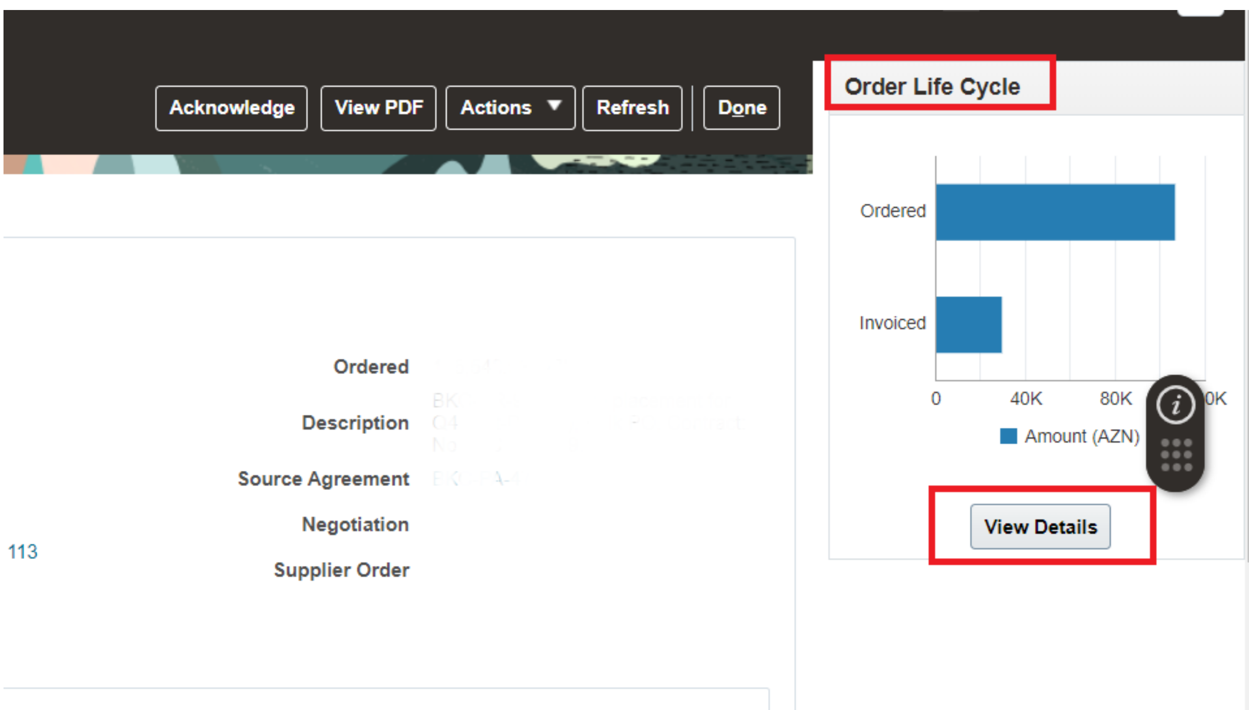
If you are changing the Quantity enter the Revised Quantity in the highlighted field. If you are changing price enter the revised price for your goods or services.



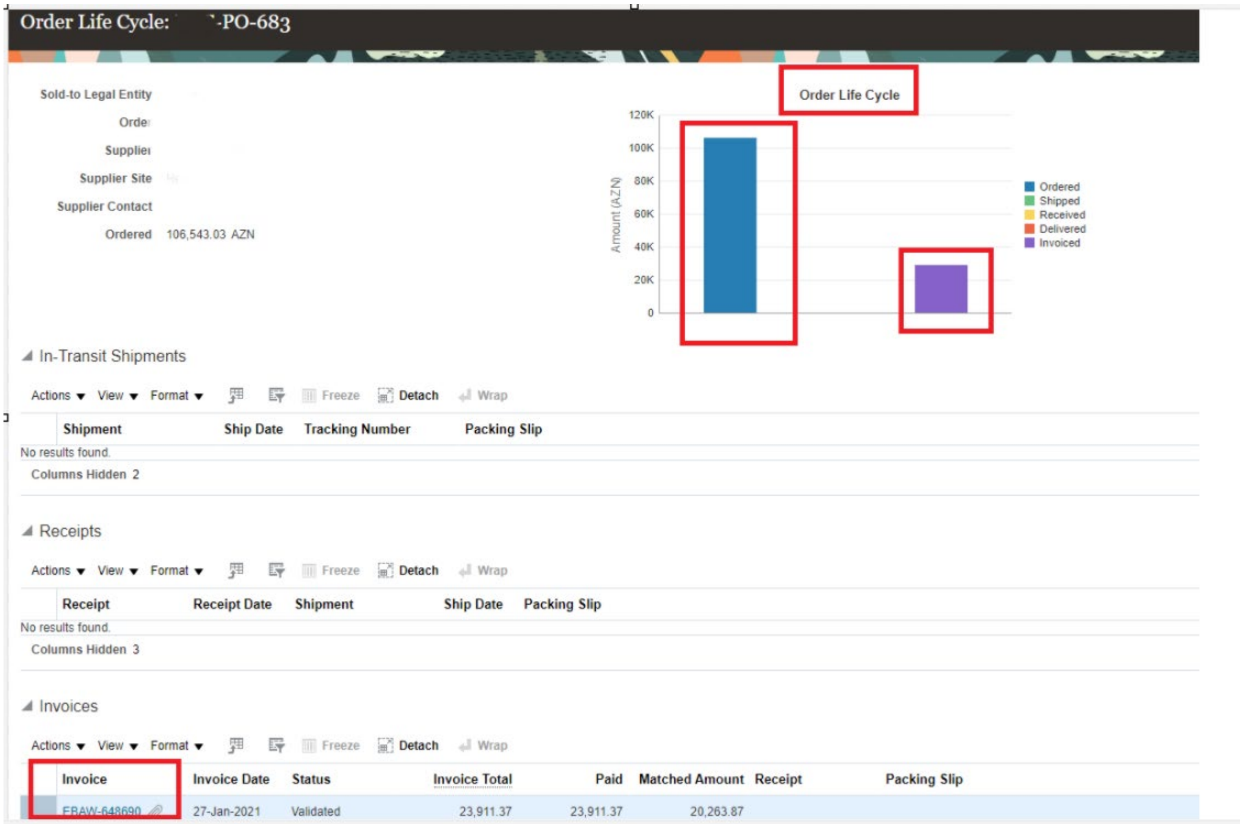
Once the document is amended, click on Save and then click on Submit to submit the change order. A Confirmation popup will appear as shown below. Once the PO Change Order is submitted, it will go for approval as per organization hierarchy setup. Click on OK.



Order Lifecycle: Managing the Purchase Order Lifecycle enables you to track and monitor the execution cycle of the order and changes to the order including cancellations. Click on the highlighted Lifecycle icon to view details of the respective PO.



You can drill down into Receipts and Invoices from this screen by clicking on the Receipt or Invoice number.

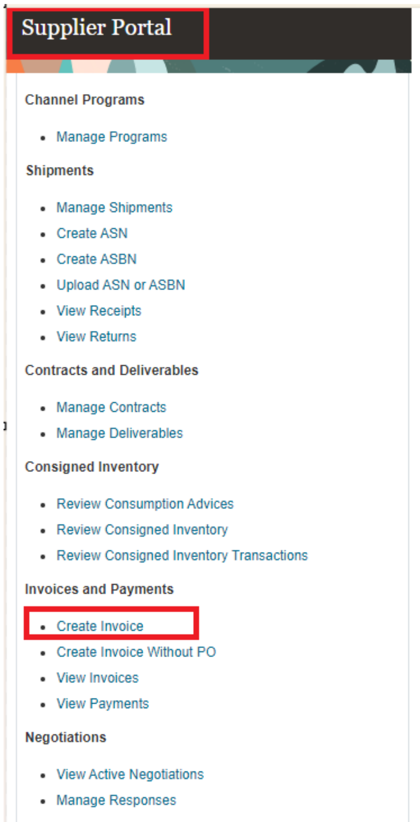


Manage Invoices

This feature enables suppliers to link invoices to a purchase order (PO) and see all activity between them and the business.

This lesson will demonstrate how to enter an invoice within the new Oracle Supplier Portal.

Click the Create Invoice Link under the Invoices and Payments Heading from Supplier Portal



Enter the following fields:

Identifying PO *- When creating an invoice, you need to link it to an existing PO, therefore, selecting the PO number associated with the invoice is mandatory.

Supplier Site*- The primary payment site will automatically populate in the Supplier Site Field. If there is no primary payment site or there is more than one payment site, then select the applicable payment site from the dropdown.

Address- This field appears when the Identifying PO is entered.

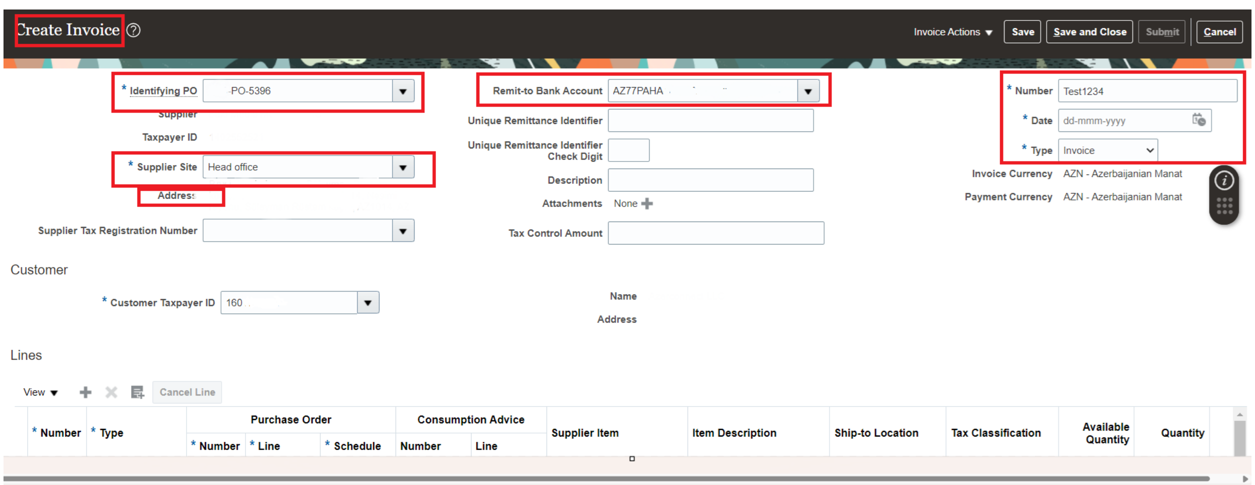
Remit-to Bank Account- Select Remit to Bank Account if there is more than one bank account.

Invoice Number*- Use a unique invoice identifier.

Date*- Click the Calendar Icon, then select a date. The invoice date must be a current or future date. You cannot backdate an invoice in the new Oracle Supplier Portal.

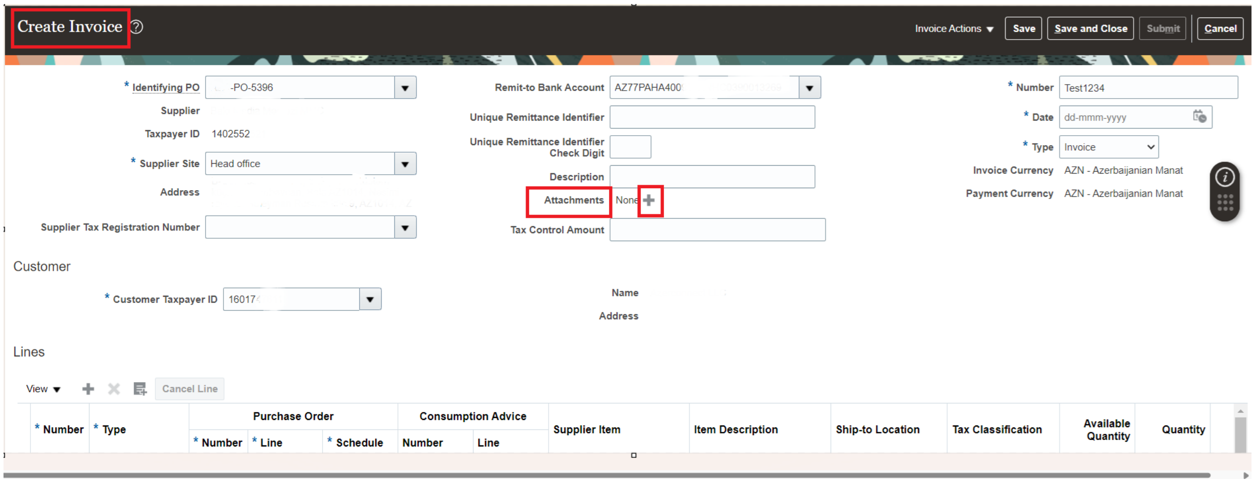
Type*- Defaults to Invoice.

Note: Fields marked with an asterisk are mandatory, therefore a value must be entered. Other fields will be auto-populated with details already present on the PO and the associated data on the system.

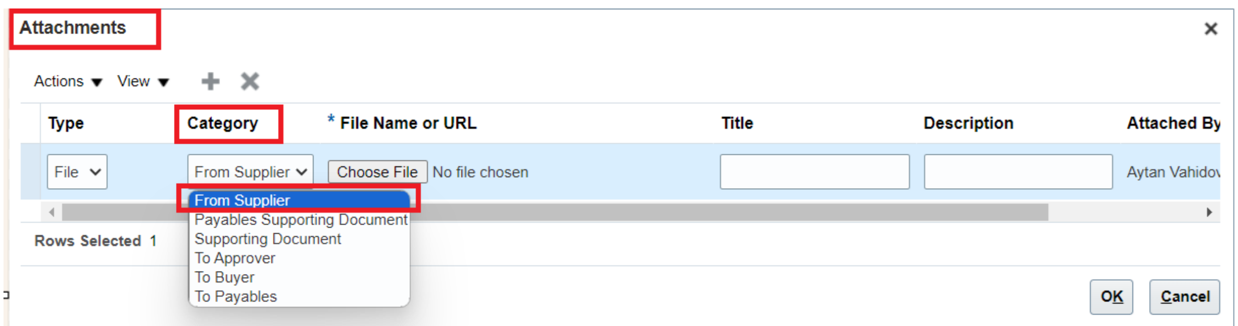


Click the + Icon next to Attachments to add an attachment.

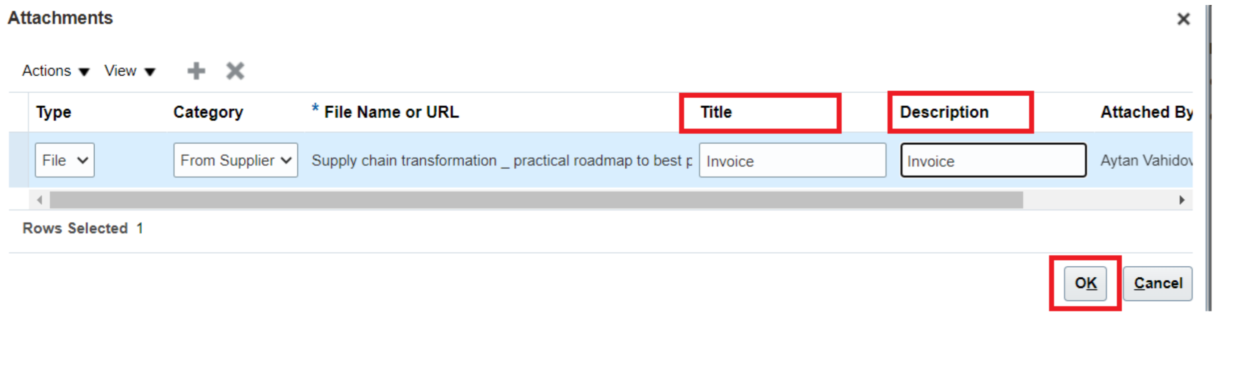
Attachments are optional but may include documents such as a PDF of the invoice from your system.



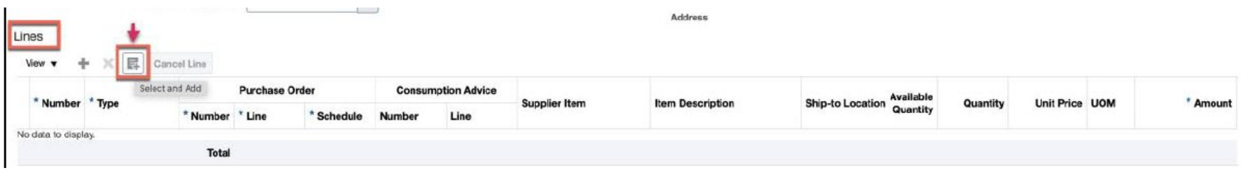
Click the Category Dropdown to choose a correct attachment category. In this example, From Supplier.



Click the Choose File Button and follow the prompt to upload a document. Optionally, enter a relevant Title and Description for the attachment, then click OK to attach the document.

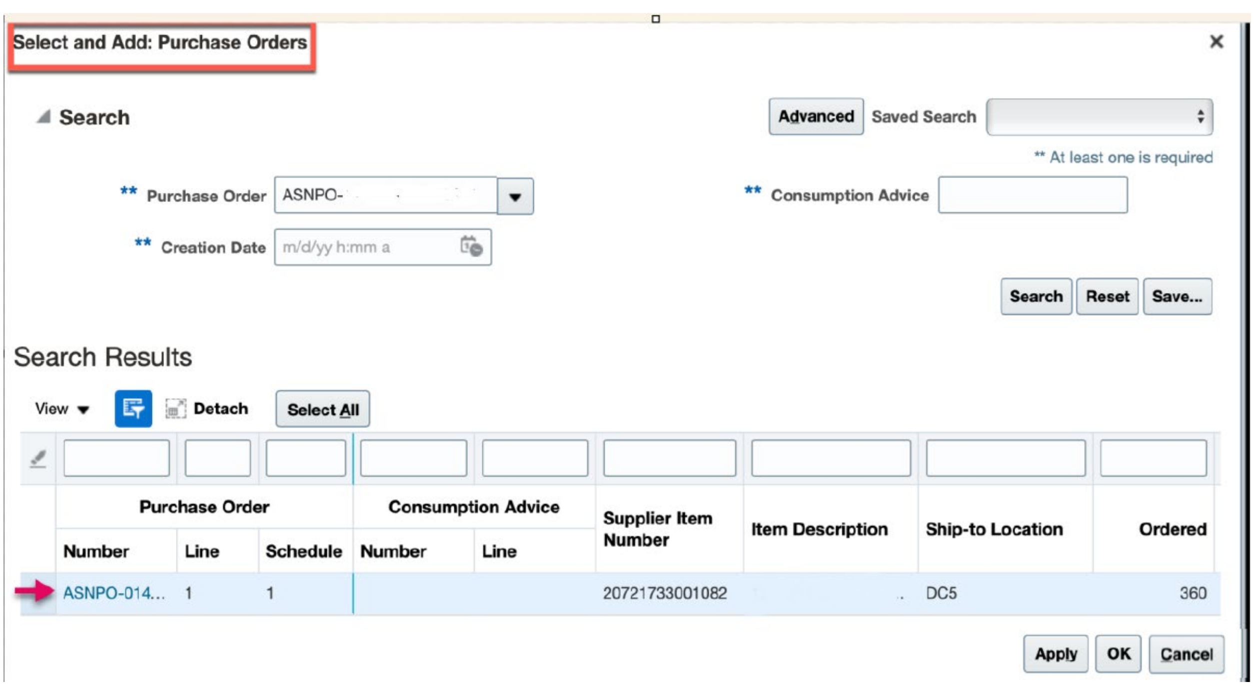


Go to the Lines Section, then click the Select and Add Button to match to the PO lines.



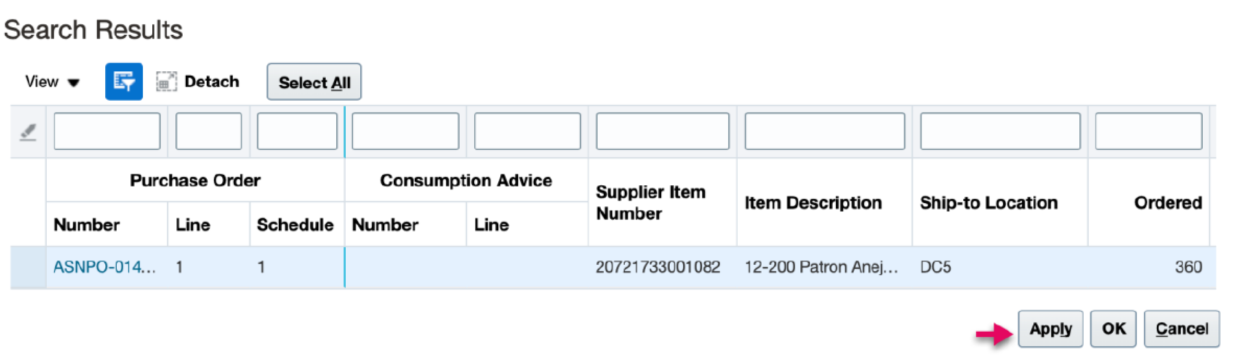
The Select and Add: Purchase Orders Window will open. PO lines should be returned (opened for matching against invoices).

Select the Line for which invoice is to be created.

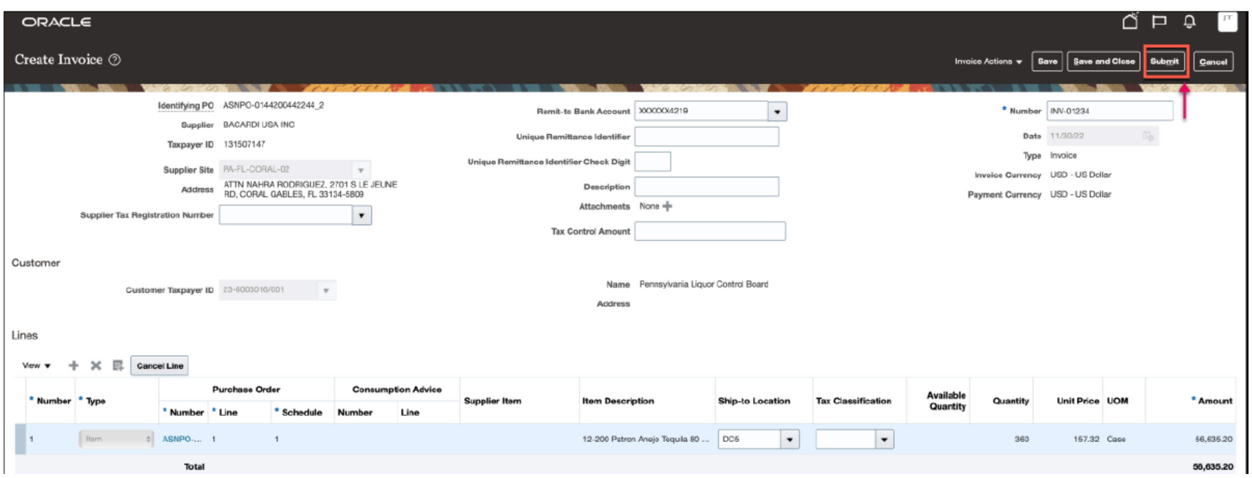


Click Apply.

Invoice line information will appear with all information necessary to create an invoice. Check that the details are populated correctly.



Click Save and Submit.



Note: The supplier must click SUBMIT to finalize the invoice. If the invoice is saved but not submitted, it will remain in “Incomplete” status and will not be processed for payment.

Click Done to return to the Supplier Portal Dashboard.

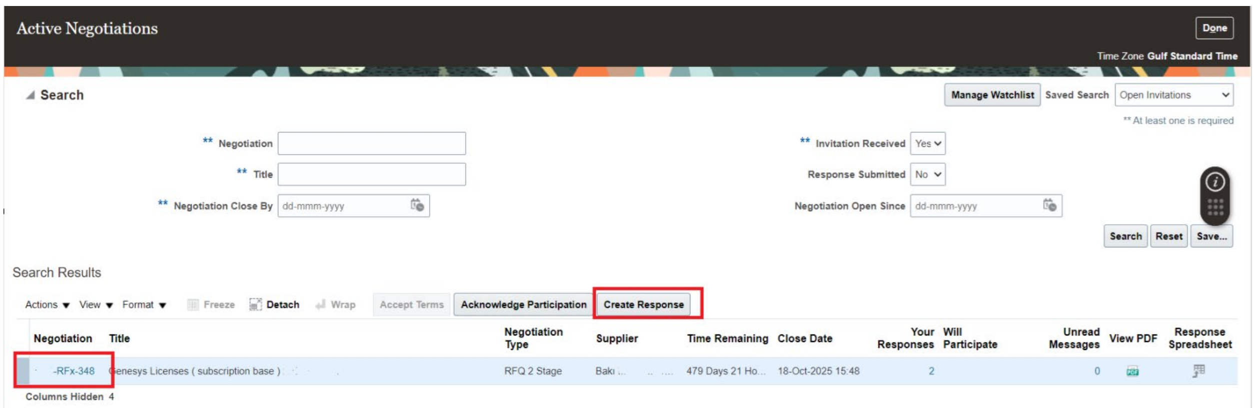
Manage Negotiation Response

After you have registered to be a supplier you have the opportunity to be directly invited to specific bids based on the Products and Services you selected during your initial registration.

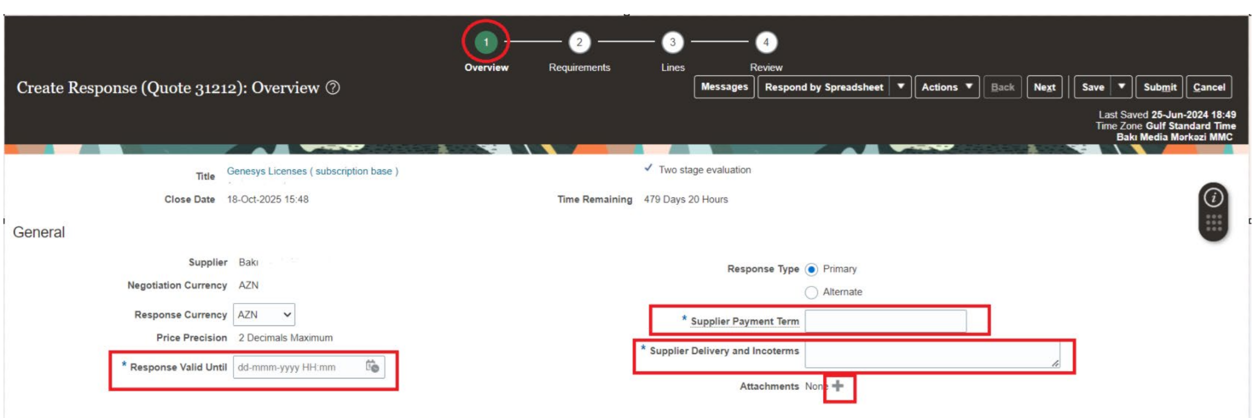
NEGOTIATION refers to a Request for Quotation (RFQ) or Tender exercise sent by the Purchaser or Buyer of buying organization where Suppliers need to response through Supplier Portal. Supplier need to ensure the email registered for Supplier Portal is valid and the person who is doing the transaction on behalf of the Supplier is an authorized person.

Click on View Active Negotiations from Supplier Portal to see active negotiations that require your response.

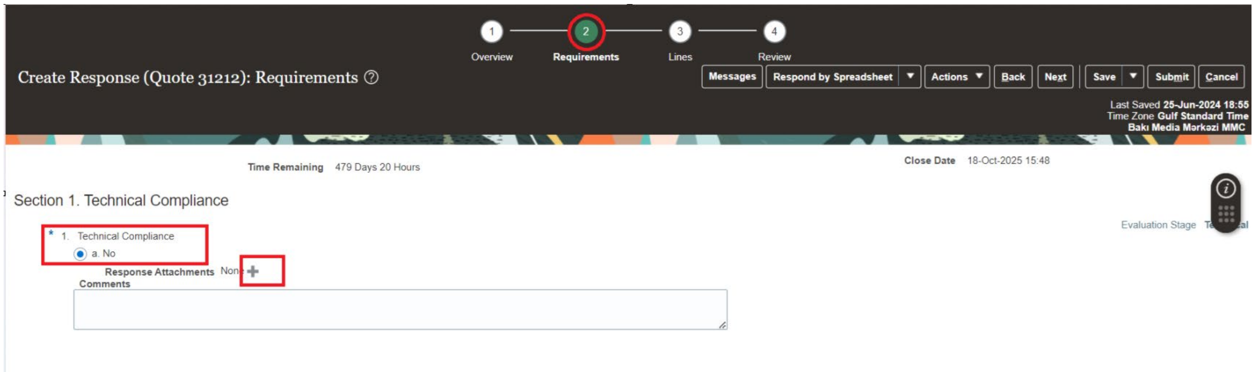
You can view the negotiation in more detail by clicking on the blue negotiation number. If you are ready to respond simply select the line of the negotiation and click Create Response. You can also create a response while viewing the negotiation.



Enter the required fields. The fields can be customized for each organization as per requirements. You need to fill in the required sections and attach technical and commercial proposals to Attachments section.

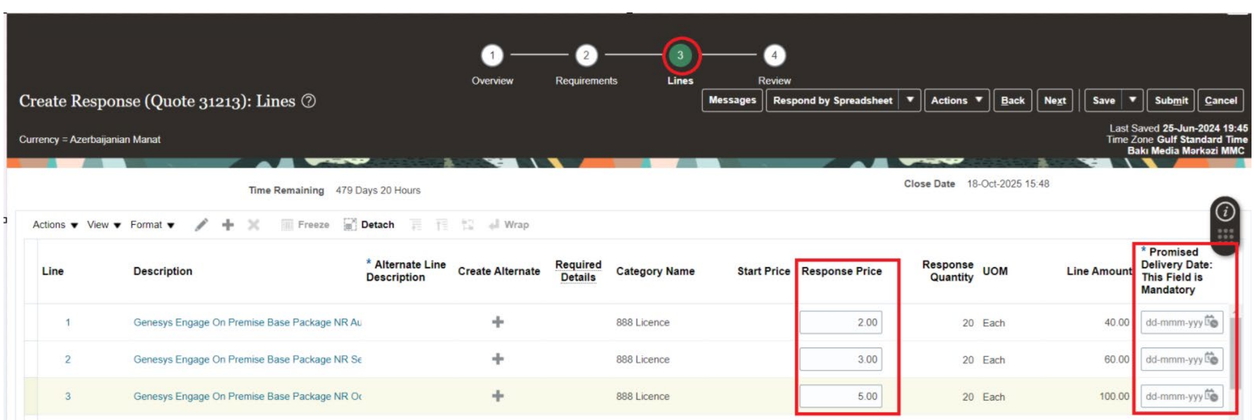


On the Requirements page you will need to either accept various terms and conditions to the specific items that are being bid/quoted or attach requested information.



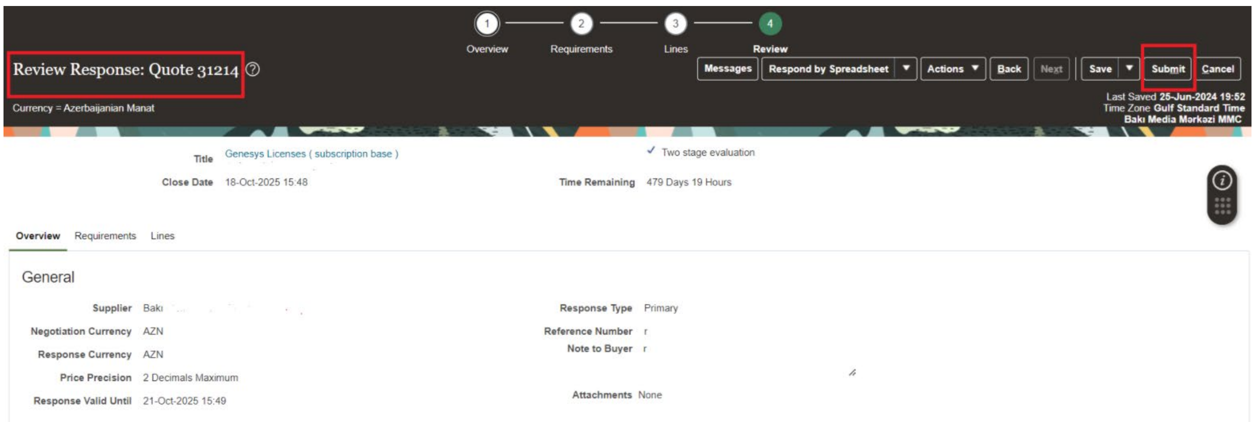
Now it's time to input your response to the line item. When pricing your item be sure to use the UOM listed and note the quantity being requested. Include your price and promised delivery date when the goods/services will be delivered.

Note: You can edit the line and enter the price details from Edit section as well.



Note: For Negotiation that contains many line items, optionally you can upload your respond price via Spreadsheet (Excel).

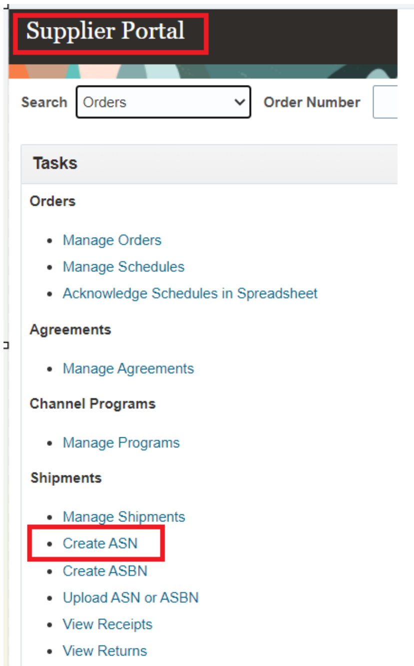
Review all the entered information before click “Submit”. Award decision will be notified to Supplier via email once evaluation and award process completed.



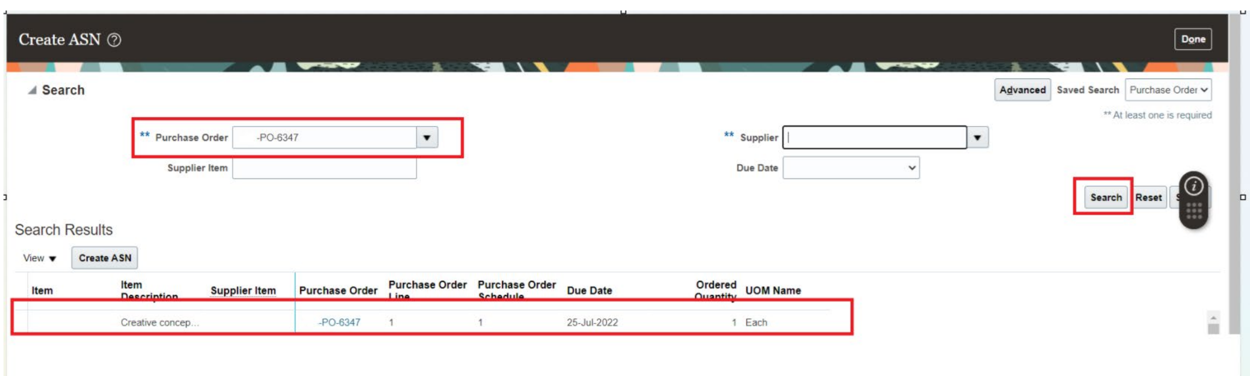
Manage ASN (Advanced Shipment Notice)

An Advanced Shipping Notice (ASN) is an electronic notification of an upcoming delivery which is sent directly from a supplier or third-party logistics company to a buyer, in advance of the shipment.

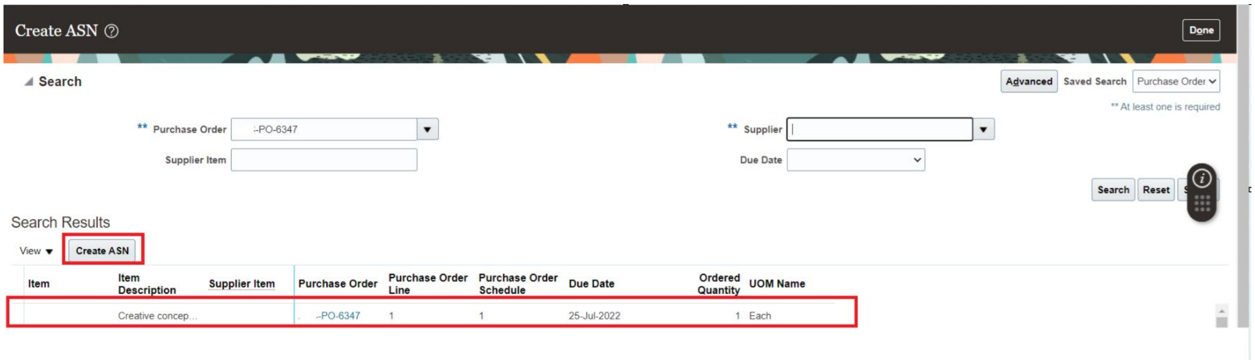
Navigate to Supplier Portal> Create ASN from Shipments Heading



Search for PO which you want to create ASN for and select the line.



Initiate ASN Creation Process.

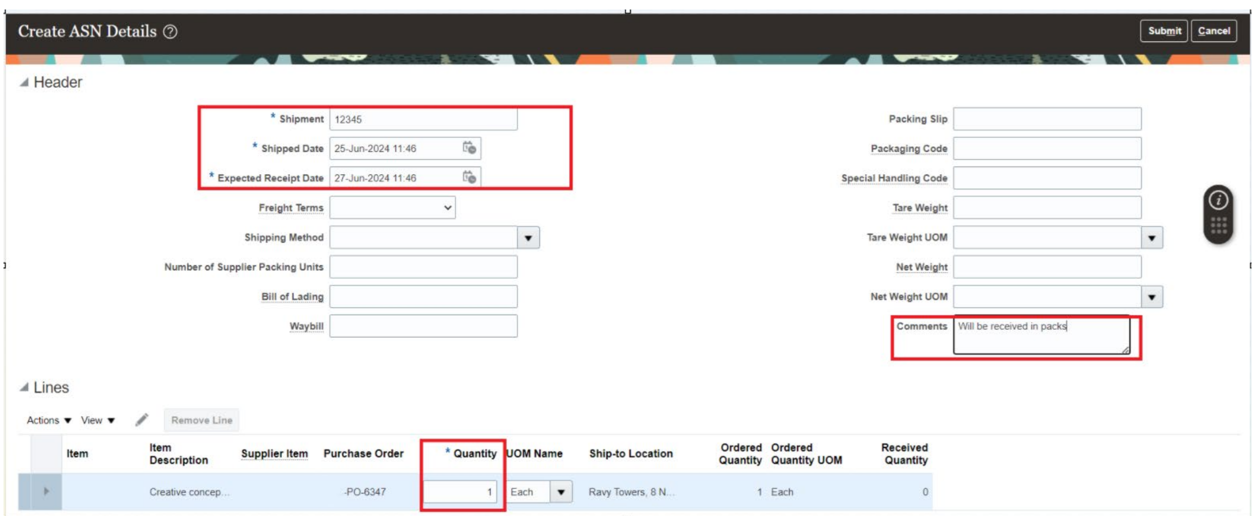


Enter **ASN Header** Information.

Enter the **Shipped Date** that represents the Date the Goods/Services will be dispatched from your organization.

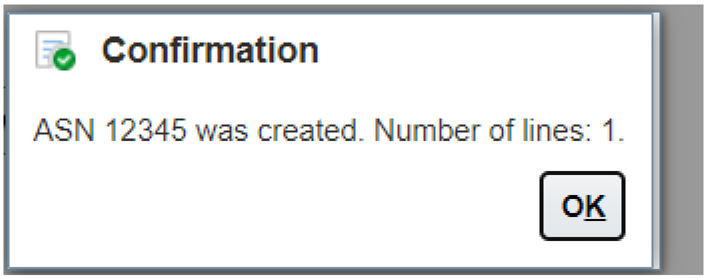
Enter **Expected Receipt Date** that represents when the Date the Goods/Services will be received by the bank.

Enter **Quantity** of the Services and or Goods to be Delivered to the organization and enter Comments if you have.



Once required information has been entered and confirmed. Select Submit.

Confirmation Message will be received. Select Ok to close the Window.

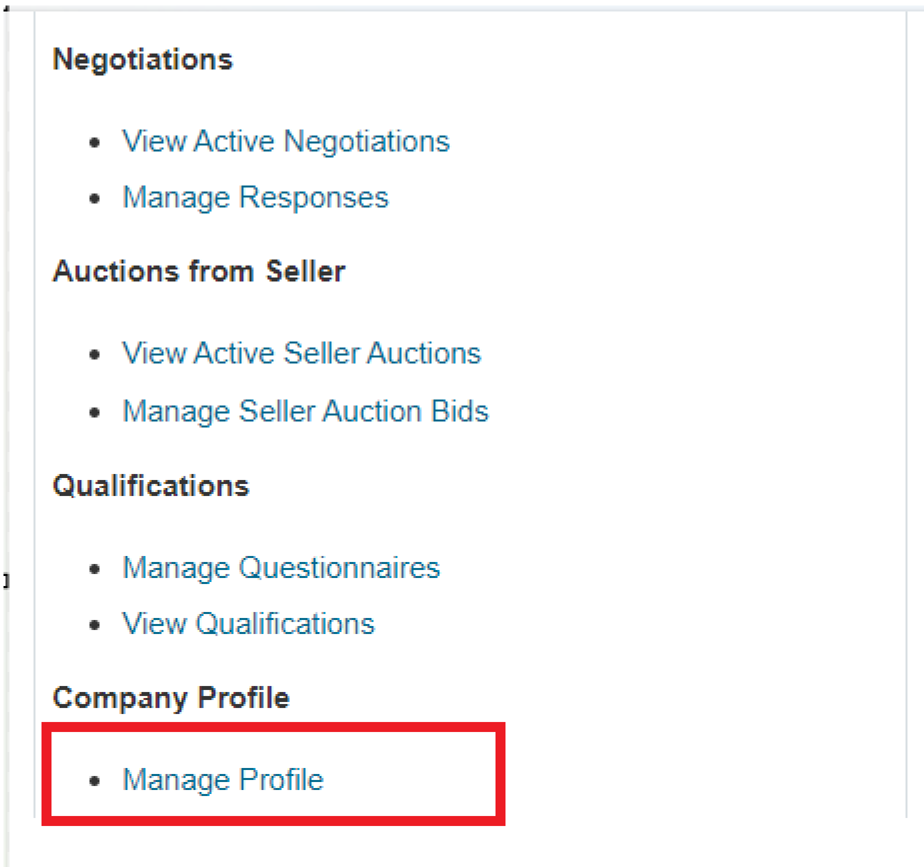


Manage Supplier Profile Changes

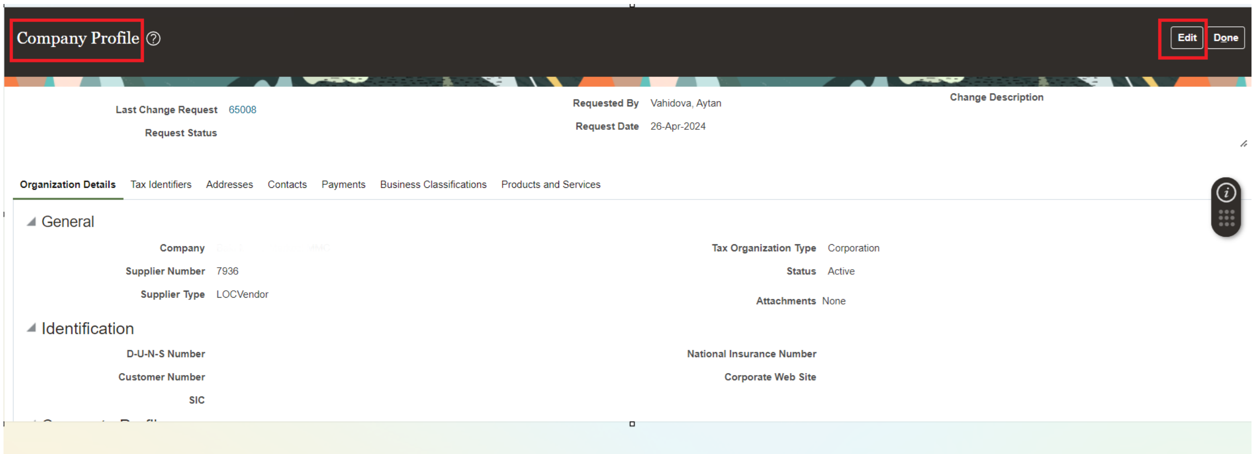
When a Supplier Registration is approved, a supplier record is created, and the supplier will receive an email from the Fusion Application with a link to the new Oracle Supplier Portal. The Supplier Portal enables you, the supplier, to see activity between you and the organization. It also allows you to enter changes to your Supplier Profile, which will be reviewed and accepted or rejected by the Vendor Data Management Unit within the buying organization.

As a supplier, you are responsible for managing your profile information including contact and address data. You are also responsible for maintaining current banking information to ensure you can be paid by the buying organization.

Go to the Supplier Portal tab and Select Manage Profile



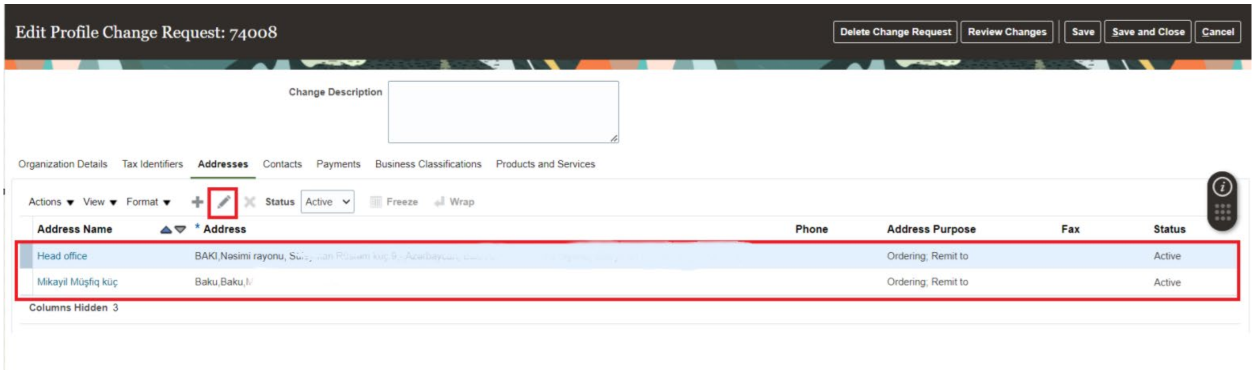
This will bring you to your Company Profile page. Select Edit on the upper right of the page



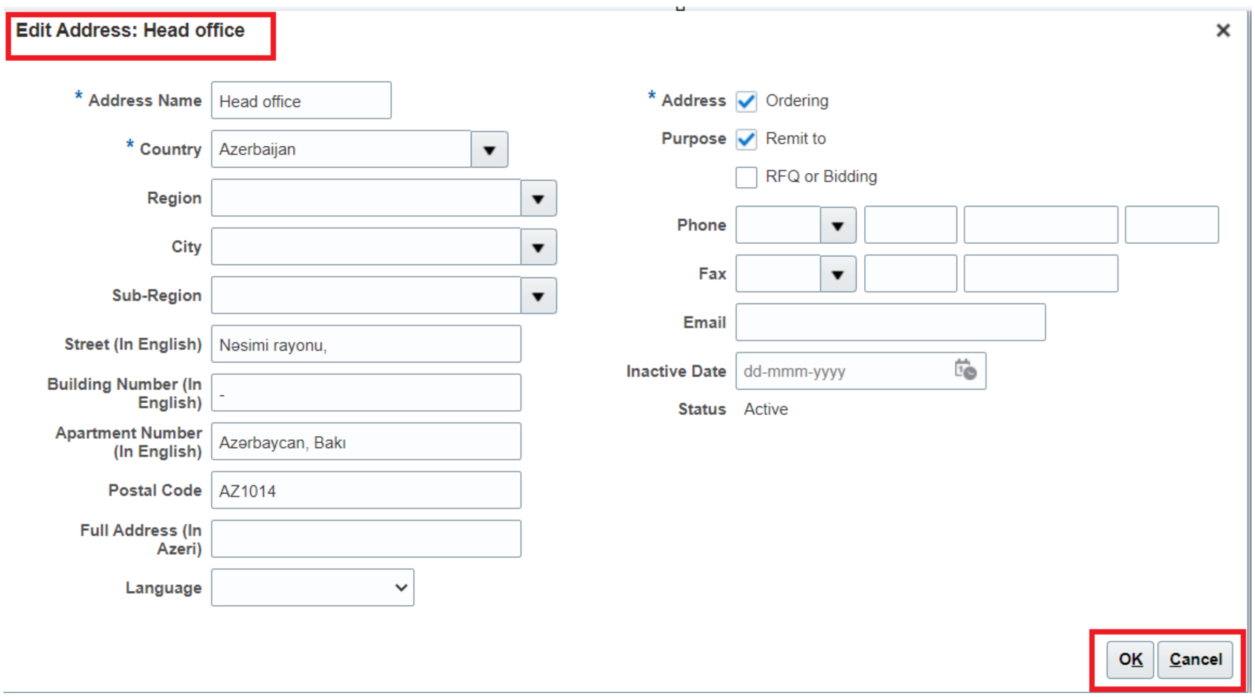
You will see a warning message that editing the profile will create a change request. Select Yes.

Go to the Addresses tab to update Address Information.

A list of the addresses you have set up should display. To edit an existing address: Select the Address Name of the address you want to change.



The details of the selected address will be displayed, allowing you to update the information. Make your edits and either select OK to accept the change and go back to the list of addresses, or select Cancel to return to the list of addresses without making a change.



To add an Address: Select +

A window will appear allowing you to enter a new address.

a. Enter a name to identify the address in the **Address Name** field

b. Select the country in which the address is located from the **Country** field

c. Enter the street address in the **Address Line 1** field

d. Enter additional address information in the **Address Line 2** field

e. Enter the city name in the **City** field (you may use the list or start entering the name)

f. Select the address state abbreviation from the **State** field

g. Enter the postal code associated with the address in the **Postal Code** field

Address Purpose (minimum of one box must be checked)

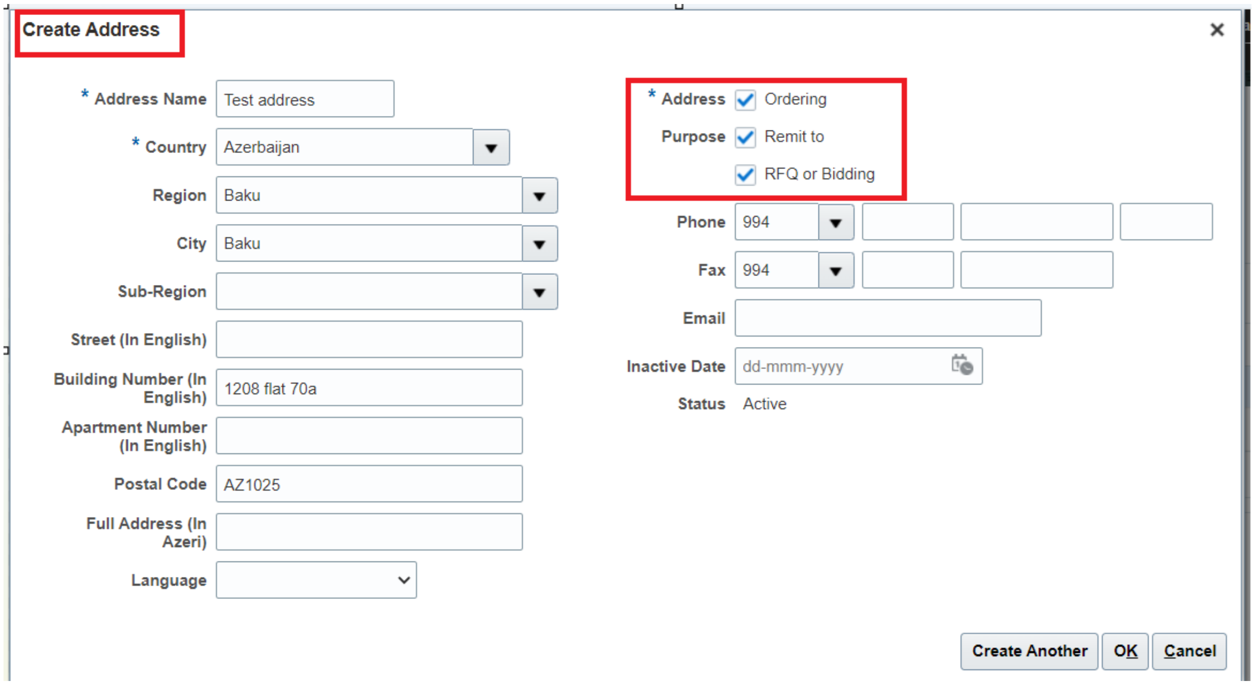
Note: A single address may be tied to multiple Address Purposes, or separate addresses may be created with differing Address Purposes.

a. Select **Ordering,** if appropriate (the ordering address is used for Purchase Orders)

b. Select **Remit to**, if appropriate (the Remit to address is used for payments)

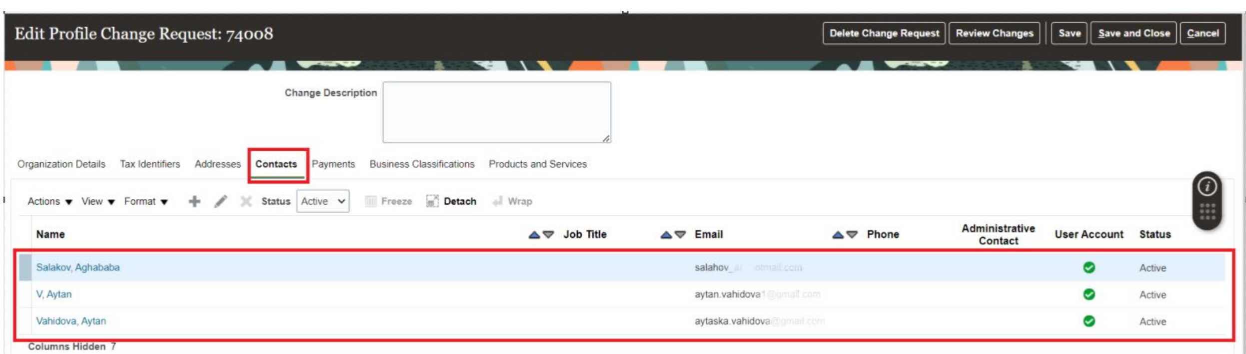
c. Select **RFQ or Bidding**, if appropriate (the RFQ or Bidding address is used for solicitations, typically your sales or administrative location)

d. Select Save and Close to add the Address



Select **Contacts** to add a Contact to the new address.

The screen will display the existing contacts that have been created. You may edit an existing contact by selecting the name from the list, or add a new contact. To add a new contact: Select +



A Create Contact pane will appear.

Enter the contact’s first name in the **First Name** field

Enter the contact’s last name in the **Last Name** field

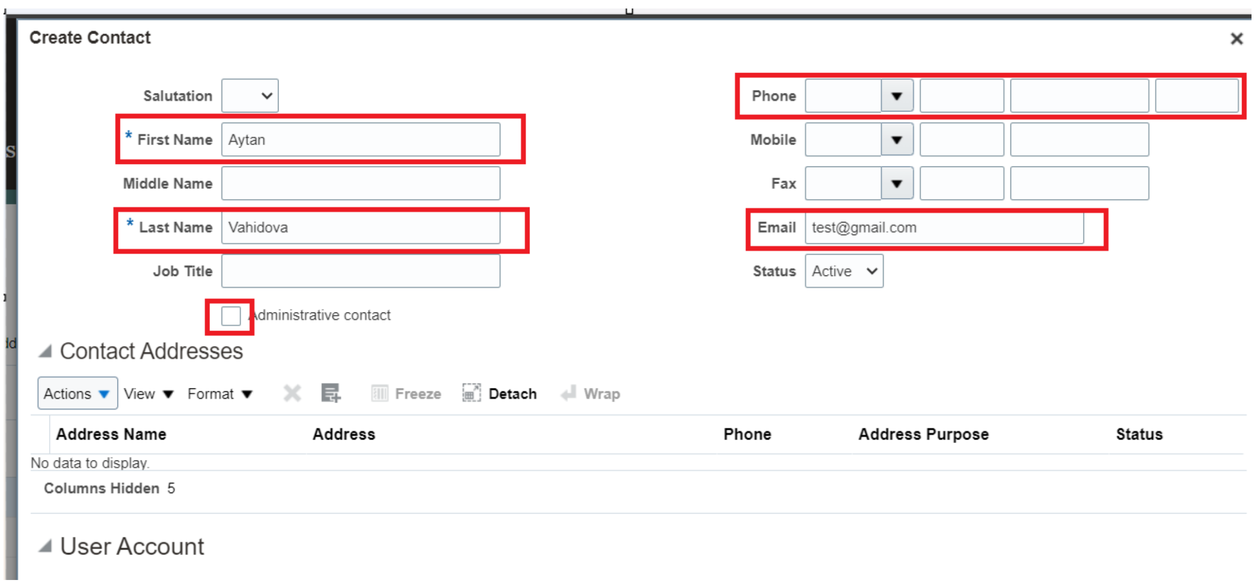
Enter a **Job Title** (optional) in the Job Title field

Select **Administrative Contact** if the contact is an administrative contact

Note: Every supplier account should have one administrative contact set up to receive PLCB communications for the organization.

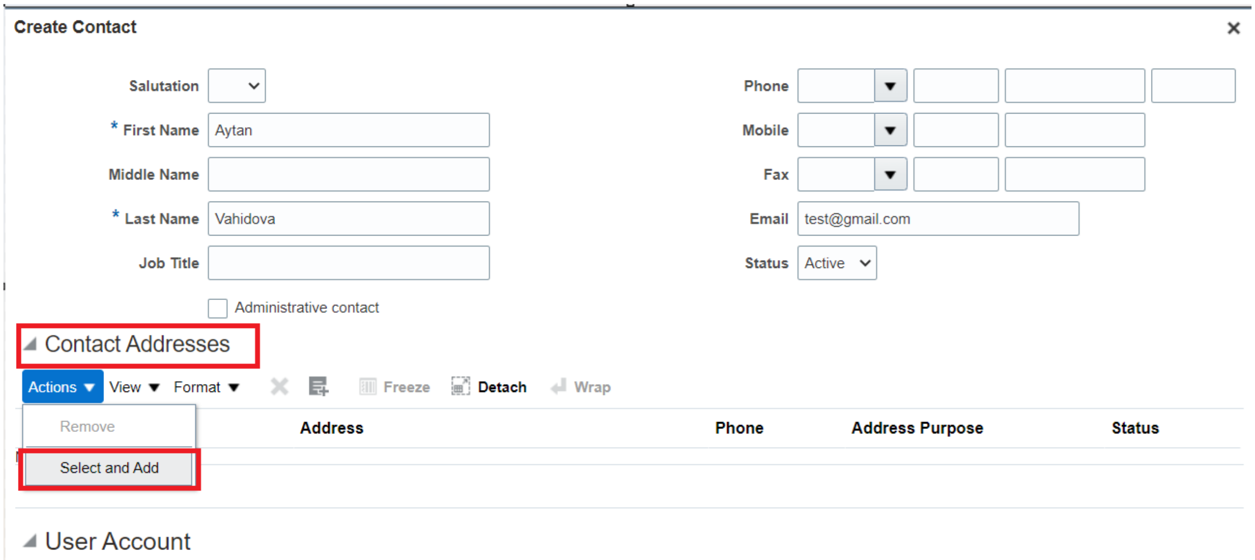
e. Enter a **phone number** (optional) in the Phone or Mobile fields

f. Enter an **email address** in the Email field



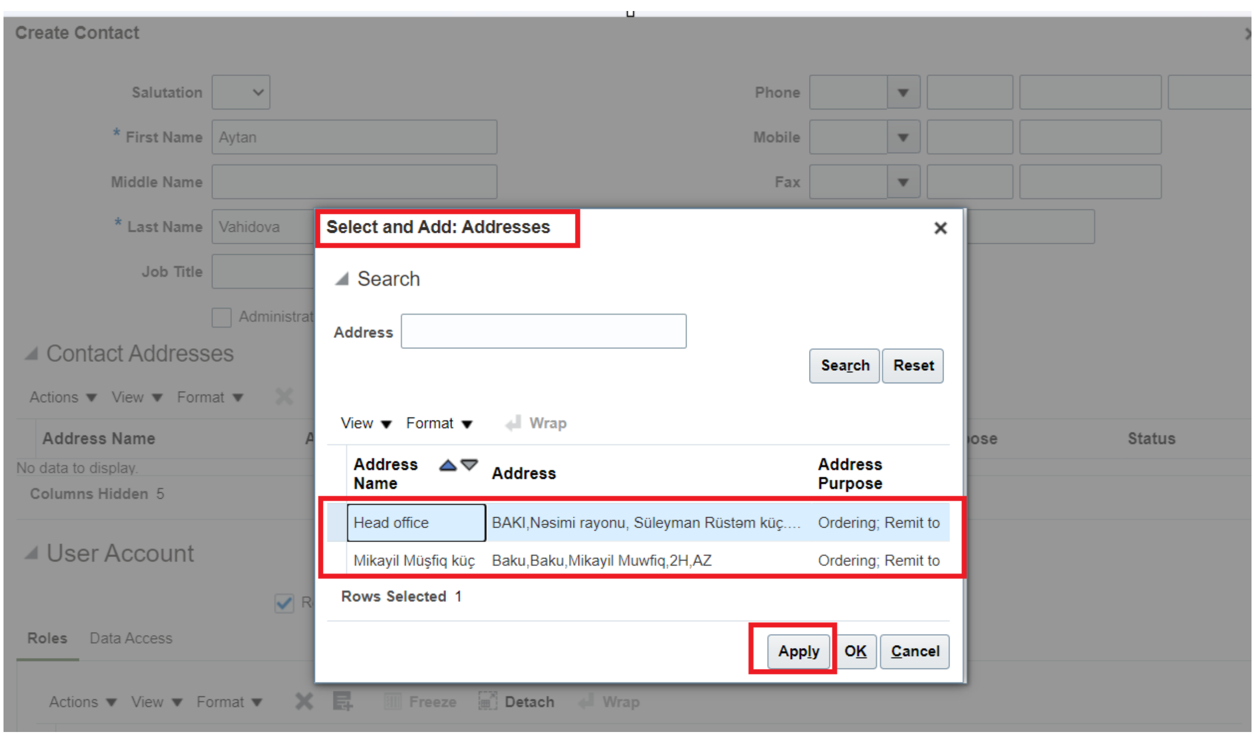
Scroll to the **Contact Address** section of the screen to associate the new contact to a Contact Address.

Select the Select and Add icon to create the association between Contact and Contact Address.



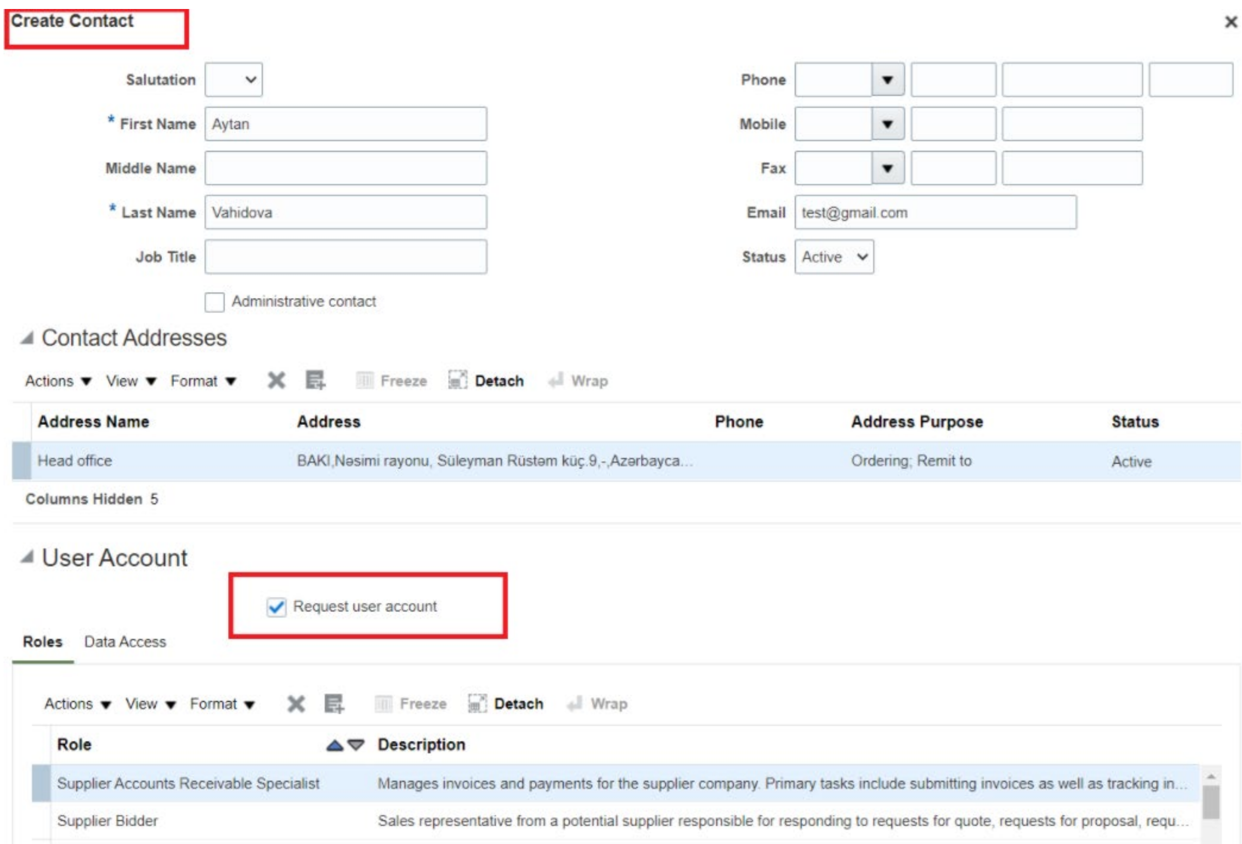
A **Select and Add Addresses** pane will appear showing the existing addresses that have been established for the supplier. Select one or more lines from the list of addresses

Select Apply to create the relationship(s)



Select OK to close the window and return to the Create Contact pane.

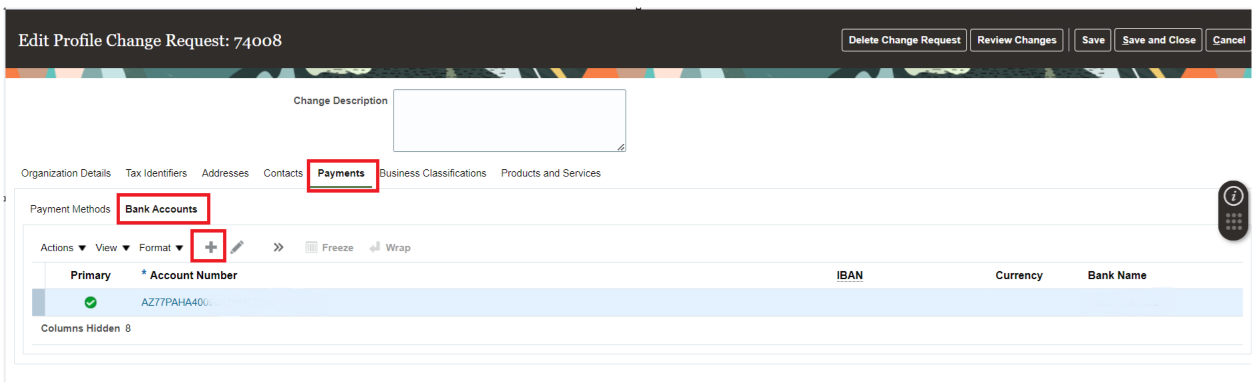
Scroll to the **User Account** section of the pane. In this section, you can see the system access roles that are available to you as a supplier. Request a user login for the new contact by selecting Request User Account tickbox.



If additional contacts need to be added, select Create Another, otherwise, select OK to return to the Edit Profile Change Request pane.

Add **banking** information. Note: As a supplier, you are responsible for adding and maintaining your banking information so you are correctly paid by the organization.

Select Payments> Select Bank Accounts > Select + to add a bank account



The Create Bank Account pane will display

Select the country where the bank account is located from the Country field

a. Enter the bank account number in the **Account Number** field

b. Select **Bank Name** from the list

c. Select **Bank Branch** from the list

d. Select **Allow international payments**, if appropriate

e. From **Date** will default to today's date

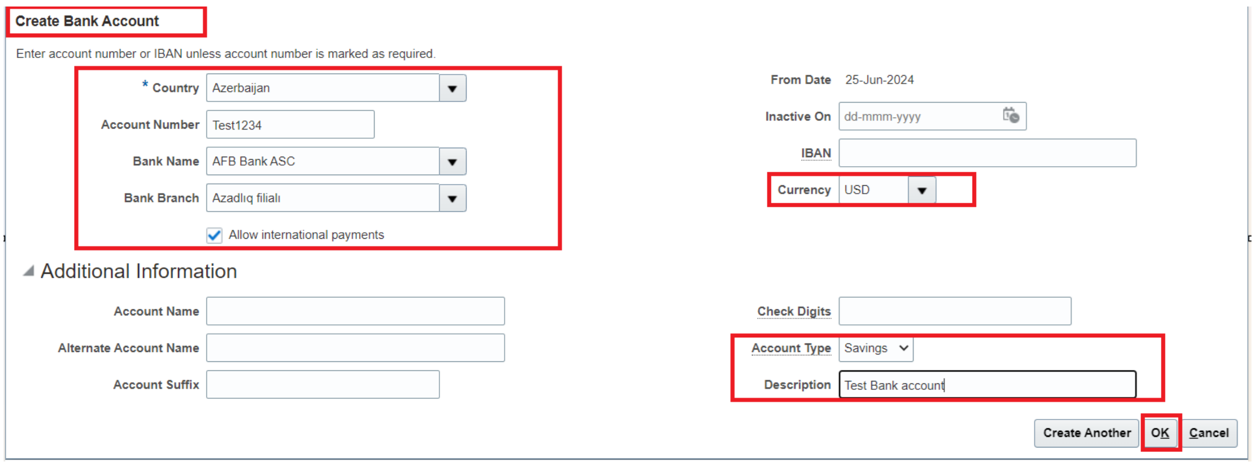
f. Enter **IBAN** if international payments are allowed

g. Select USD from the **Currency** list

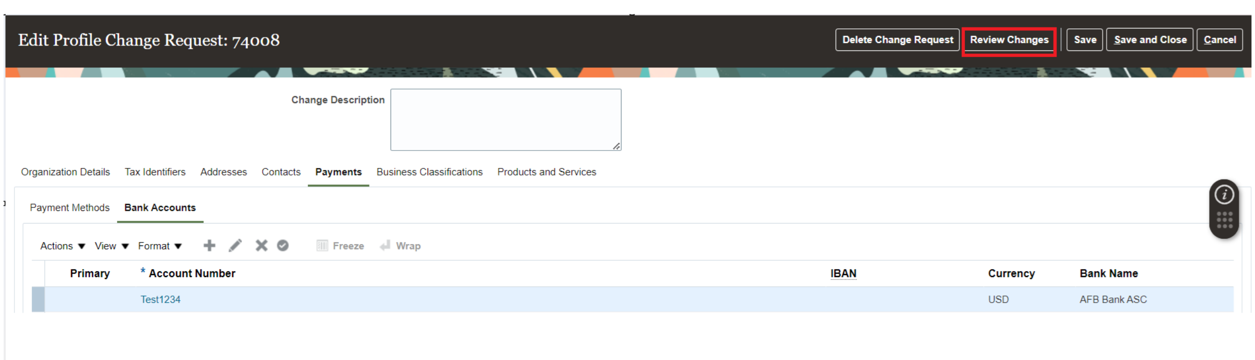
h. Select **Account Type** from the list

I. Enter **Description**

j. Select OK to add the bank to your profile and return to the Edit Profile

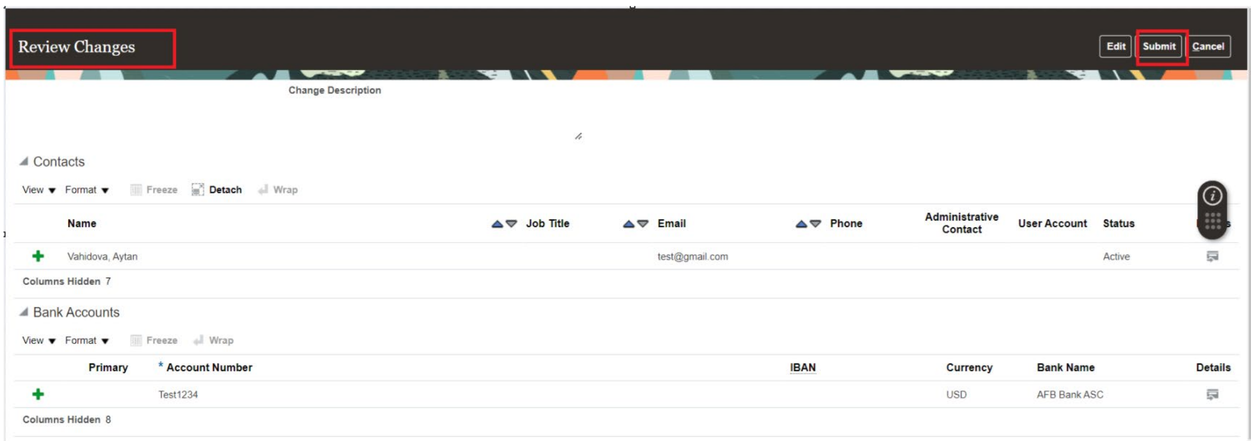


Change Request Note: Your supplier record will not be updated in Oracle until you have reviewed your Change Request and selected Submit to send it to the organization for review and approval



Review the changes that have been made and select Submit to send the Change Request to the company for review.

Note: Your supplier record will not be updated in Oracle until you have reviewed your Change Request and selected Submit to send it to the organization for review and approval.



A summary screen will appear with a message that the Change Request has been submitted for approval. Select OK.