Supplier Portal Overview - External

December 2019
Key Terms and Concepts (1 of 2)

**INVOICE**: An invoice is a document issued by a supplier to City of Atlanta (CoA) that indicates the quantities and costs of the products or services provided by the supplier. An invoice specifies what CoA must pay the supplier according to the City's payment terms.

**PROCUREMENT**: The procedures for obtaining goods or services, including all activities from the planning steps, preparation and processing of a requisition, and creation of a purchase order or contract.

**PROSPECTIVE SUPPLIER**: A supplier who is allowed to submit quotes, bids, or proposals, but not allowed to receive purchase orders or create/submit invoices.
Key Terms and Concepts (2 of 2)

**PURCHASE ORDER**: A legal document extended by CoA to a supplier, indicating types, quantities, and agreed prices for products or services as well as agreed upon terms and conditions to be met by both parties.

**SPEND AUTHORIZED SUPPLIER**: A supplier who is allowed to submit quotes, bids, or proposals as well as receive purchase orders and create/submit invoices for payment.

**SUPPLIER**: A person, company, or organization that sells or supplies products or services to CoA.

**SUPPLIER SITE**: Captures the supplier’s address, contact name, email address and use (pay or purchasing) details.
# Lesson Agenda

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<tbody>
<tr>
<td>Lesson 1 : Onboard New Supplier</td>
<td>30 mins</td>
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<td>40 mins</td>
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Onboard New Supplier
## Lesson Agenda

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Supplier Registration Workflow

Here is the workflow of the Supplier Registration sub-process.

NOTE:

- **Spend Authorized supplier registration**: After approval, the supplier profile is automatically created with the site details and the supplier will receive the login credentials to access the Supplier Portal. If the registration is rejected, the supplier receives the rejection notification via email. The supplier can perform all the transactions available on the Supplier Portal. **Spend Authorized suppliers can view and respond to Solicitations, can be assigned Purchase Orders, send Invoices, and receive Payment.**

- **Prospective suppliers registration**: After registration, the supplier profile is automatically created but the site is not assigned to the supplier profile. The supplier receives Supplier Portal login details. **Prospective suppliers can view and respond to Solicitations but cannot be assigned Purchase Orders, send Invoices, or receive Payment.**
The suppliers/vendors who want to register with the City of Atlanta can visit City of Atlanta’s website and click the Prospective or Spend Authorized registration URL.

In this example, we will learn the steps of the external prospective supplier registration sub-process.

1. Click the Supplier Registration URL on the CoA web portal.

https://www.atlantaga.gov/government/departments/procurement/home2/supplier-registration

**NOTE:** The user should use Google Chrome instead of Internet Explorer.

**NOTE:** The steps shown in this example are for a Spend Authorized Vendor.
External Registration – Step 2 of 11

Enter the supplier company details.

**NOTE**: Enter a value for at least one of these fields: Taxpayer ID, or Tax Registration Number.

Enter the contact information.

Click the **Next** button.
Click the **Next** button.

**NOTE:** This contact information automatically populated on this tab based on the contact information that was entered on the **Company Details** tab.

Click **Next**

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Click the **+ Create** button to open the **Create Address** pop-up window.
Enter the supplier address and contact information in the respective fields on the **Create Address** pop-up window.

Click the **OK** button.

Click the **Next** button to open the **Business Classifications** tab.
External Registration – Step 5 of 11

10 Click the + button to add the business classification details.

11 Enter the business classification details.

12 Click the Next button to open the Bank Accounts tab.
List of values for Certifying Agencies

<table>
<thead>
<tr>
<th>Program</th>
<th>Classification</th>
<th>Sub-Classification</th>
<th>Certifying Agency</th>
<th>Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBO</td>
<td>MBE</td>
<td>AABE</td>
<td>City of Atlanta</td>
<td>AABE</td>
</tr>
<tr>
<td>EBO</td>
<td>MBE</td>
<td>HABE</td>
<td>City of Atlanta</td>
<td>AABE</td>
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<tr>
<td>EBO</td>
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<td>APABE</td>
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<td>AABE</td>
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<tr>
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<td>City of Atlanta</td>
<td>NABE</td>
</tr>
<tr>
<td>EBO</td>
<td>FBE</td>
<td></td>
<td>City of Atlanta</td>
<td>FBE</td>
</tr>
<tr>
<td>SBO</td>
<td>SBE</td>
<td></td>
<td>City of Atlanta</td>
<td>SBE</td>
</tr>
<tr>
<td>SBOSM</td>
<td>SBE</td>
<td></td>
<td>City of Atlanta</td>
<td>SBE</td>
</tr>
<tr>
<td>DBE</td>
<td>DBE</td>
<td></td>
<td>G-DOT/MARTA</td>
<td>DBE</td>
</tr>
<tr>
<td>ACDBE</td>
<td>ACDBE</td>
<td></td>
<td>G-DOT/MARTA</td>
<td>ACDBE</td>
</tr>
</tbody>
</table>
13 Click the **Create** button to open the **Create Bank Account** pop-up window.

Enter the bank account details on the **Create Bank Account** pop-up window.

If you **do not see** your **Bank Name** in the drop down menu, please contact **City of Atlanta Treasury** to get your Bank added (doftreasury@atlantaga.gov)

Bank Branch = Routing #

If you **do not see** your **Bank Branch**, please contact **City of Atlanta Treasury** to get your Bank Branch added (doftreasury@atlantaga.gov)

14 Click the **OK** button.
External Registration – Step 7 of 11

16 Click the **Next** button to open the **Products and Services** tab.

17 Click the **Select and Add** button to open the **Select and Add: Products and Services** pop-up window.
External Registration – Step 8 of 11

Add the **description** of, (preferably a one word description) the commodity or service in the **Category Name** field or in the Description field. Once the requested description has been found, Click the checkbox to select the categories and services.

Click the **Apply** button to add the selected products and services.

Click **OK**.
External Registration – Step 9 of 11

21 Click the Next button.

22 Review the information

23 Click the Register button to submit the registration request.
An Approval e-mail is sent to registered E-mail ID with Registration Request Details.

Another e-mail with Assigned Roles and Description of each roles is sent to the registered E-mail ID.
A Welcome E-Mail is sent, with a link to **reset** the registered password.

--- Forwarded Message ---
From: "ehxr-dev2.fa.sender.2@workflow.mail.us2.cloud.oracle.com" <ehxr-dev2.fa.sender.2@workflow.mail.us2.cloud.oracle.com>
To:
Sent: Monday, July 23, 2018, 10:51:38 AM EDT
Subject: Oracle Fusion Applications-Welcome E-Mail

Dear JANE DOE,

Congratulations! Your Oracle Fusion Applications account has been successfully created.

Please follow the link below to reset your password.


For any issues, contact your system administrator.

Thank You,
Oracle Fusion Applications
Supplier Portal Overview and Manage Profile
## Lesson Agenda

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Using emails, faxes, and spreadsheets to manage transactions is time-consuming and error-prone. Supplier Portal is a one-stop shop for suppliers to manage all transactions such as negotiations, agreements, invoices, and purchase orders.

Supplier Portal lists all the items requiring supplier’s attention in one location. This enables the suppliers to quickly take necessary actions. For example, suppliers can accept or reject agreements or respond to negations from the Supplier Portal.

Here are the steps for the supplier to access the Supplier Portal:

1. Enter the **User ID** and **Password**.

2. Click the **Sign In** button.
Click the **Supplier Portal** icon to open the Supplier Portal page.

**NOTE:** We will learn about the steps to manage negotiations from Supplier Profile in the Sourcing courses.
Supplier Portal Page

Here is an overview of the Supplier Portal home page.

Use the search functionality to search for an order/solicitation using the respective number.

Use the task list to view/access the information related to a specific task. The important task categories include, orders, agreements, and solicitations (negotiations).

Use the Requiring Attention section to view the graphical representation of the tasks that require immediate attention. For example, the graph in the above screenshot shows that the supplier has 10 items that require their attention. The items include one agreement to author task, three solicitations that are closing soon, six solicitations messages. The supplier can click a section to view the details and respond to that item.

Use the Recent Activity section to view the activities performed over the last 30 days.

Use the Transaction Reports section to view the reports of the transactions that occurred over the last 30 days.
Edit Supplier Profile
Edit Profile – Step 1 of 10

Let’s look at the steps to Edit Supplier Profile.

1. Click Supplier Portal.
Click **Manage Profile**.

Company Profile screen is displayed. Click **Edit**.
Edit Profile – Step 3 of 10

Edit Profile Change Request screen is displayed.

Edits can be made under various parameters such as **Organization Details, Address, Contacts** etc.
Edit Profile – Step 4 of 10

Let’s look at the steps to add an address.

5. To add a new Address, Click “+.”

6. Enter the required Details.

7. Click OK.
To edit an Address, click **Edit** under **Actions**.
Edit Profile – Step 6 of 10

Enter the appropriate **fields**.

Click **OK**.
Edit Profile – Step 7 of 10

Let's look at the steps for updating contact and requesting a user account.

11. To add a contact click the **Contacts** section.

12. Click the + to add a new contact.
Edit Profile – Step 8 of 10

Let's look at the steps for updating contact and requesting a user account.

13 Enter the **necessary details** for the new contact (name, phone #, email, etc.)

14 Check the “**Request user account**” if you want the new user to gain access to supplier portal.
Edit Profile – Step 9 of 12

Let's look at the steps to change Payment.

15 To enter a new Payment Method, click “+”.

16 Alternatively, click Add Row under Actions.

Choose the new payment method.
To change the default payment method, click the row of the chosen **Payment Method**.

Click **Actions > Set Default**.
Click **Review Changes**.

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**Edit Profile Change Request: 2001**

<table>
<thead>
<tr>
<th>Payment Methods</th>
<th>Bank Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions</td>
<td>View, Format, Freeze, Detach, Wrap</td>
</tr>
<tr>
<td>Default</td>
<td>Payment Method</td>
</tr>
<tr>
<td>COA Retainage</td>
<td>From Date: 1/1/51, To Date:</td>
</tr>
<tr>
<td>Credit Card</td>
<td>From Date: 1/1/51, To Date:</td>
</tr>
<tr>
<td>Outourced Check</td>
<td>From Date: 10/2/08, To Date:</td>
</tr>
</tbody>
</table>
Edit Profile – Step 12 of 12

Click **Submit**.

After submitting the changes, it is sent for approval to supplier administrator. Changes will become active after approval.
Lesson Summary

You have reached the end of Onboard/Register New Supplier lesson of the course. You should now be able to:

- Onboard Supplier through Supplier Self-Registration Process
Supplier Portal Key Functionalities
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Manage Orders – Step 1 of 3

Let's look at the steps to Manage Orders.

On Supplier Portal, click Manage Orders.
Manage Orders – Step 2 of 3
Manage Orders screen is displayed.

2. Enter the appropriate field(s).

3. Click Search.
Manage Orders – Step 3 of 3

Search results are displayed. Appropriate Order can be reviewed.
Manage Agreements – Step 1 of 2

Click Manage Agreements.
Manage Agreements – Step 2 of 2

2. Enter the appropriate field(s).

3. Click Search.

4. Search Results are displayed. Appropriate Agreement can be reviewed.
Click **Create Invoice**.
Create Invoice – Step 2 of 5

Create Invoice screen is displayed.

2. Enter the appropriate field(s).

3. To select Identifying PO and Supplier Site, click drop-down.
To add a line item, Click "+" (Select and Add)
Create Invoice – Step 4 of 5

Select and Add pop-up is displayed.

5. Highlight the appropriate row for the line item.

6. Click OK.
Create Invoice – Step 5 of 5

7 Attachments are **required**.
Attach your invoice before you submit.

8 Confirmation pop-up is displayed. Click **OK**.

9 Click **Submit**.
Create Credit Memo – Step 1 of 5

1. Click **Create Invoice**.
Create Credit Memo – Step 2 of 5

2. Enter appropriate fields. To select **Identifying PO** and **Supplier Site**, click **drop-down**.

3. Enter **Invoice number** and **Date**

4. Next to **Type**, choose **Credit Memo**

5. **Attachments** are **required**. **Attach** your **invoice** before you submit.
Create Credit Memo – Step 3 of 5

6 Under **Items** section, Click **Select and Add** button
Highlight the appropriate row for the line item.

Click OK.
Create Credit Memo – Step 5 of 5

You can update the **quantity** as needed.

You will see the **total** amount as a credit.

Click **Submit**.
View Invoices – Step 1 of 3

1. Click **View Invoices**.
View Invoices – Step 2 of 3

2 Enter the appropriate field(s).

3 Click **Search**.

4 Search Results are displayed. Appropriate Invoice can be reviewed.
View Invoices – Step 3 of 3

View invoice status

If you click **On Hold**, you can view the **Hold Reason** as seen below.
## Invoice Holds

Below are some common invoice holds

<table>
<thead>
<tr>
<th>Hold Name</th>
<th>Hold Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line variance</td>
<td>Total of invoice lines does not equal invoice amount.</td>
</tr>
<tr>
<td>Received quantity</td>
<td>Billed quantity exceeds received quantity.</td>
</tr>
<tr>
<td>Amount received</td>
<td>Amount billed exceeds amount received.</td>
</tr>
<tr>
<td>Ordered quantity</td>
<td>Billed quantity exceeds ordered quantity.</td>
</tr>
</tbody>
</table>
View Payments – Step 1 of 2

1. Click View Payments.
View Payments – Step 2 of 2

2. Enter appropriate field(s).

3. Click Search.

4. Search Results are displayed. Appropriate Payments can be reviewed.
How to Reset Password in Supplier Portal
How to Reset your Password

1. Navigate to https://ehxr.fa.us2.oraclecloud.com, click “forgot password.”

2. Enter email address, click forgot password and click submit. You will receive an email to reset your password.
Questions?

For any questions regarding **Supplier Registration**, please contact supplierregistration@atlantaga.gov

For any questions regarding **Invoices and Payments**, please contact apmailbox@atlantaga.gov