Supplier Portal Overview - External

December 2019

ATLcloud

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

Lesson	Duration
Lesson 1 : Onboard New Supplier	30 mins
Lesson 2 : Supplier Portal Overview	15 mins
Lesson 3 : Supplier Portal Key Functionalities	40 mins
Course Summary	5 mins

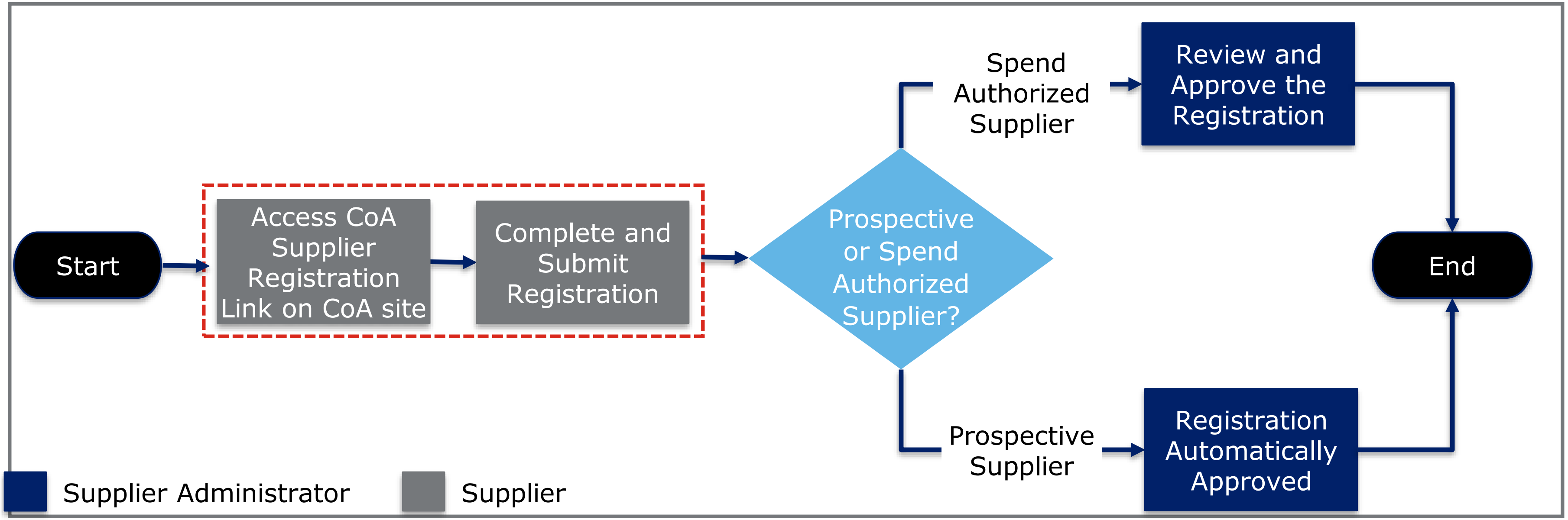
Onboard New Supplier

Lesson Agenda

Lesson	Duration
Lesson 1 : Onboard New Supplier	30 mins
Lesson 2 : Supplier Portal Overview	15 mins
Lesson 3 : Supplier Portal Key Functionalities	40 mins
Course Summary	5 mins

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.*

External Registration – Step 1 of 11

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.

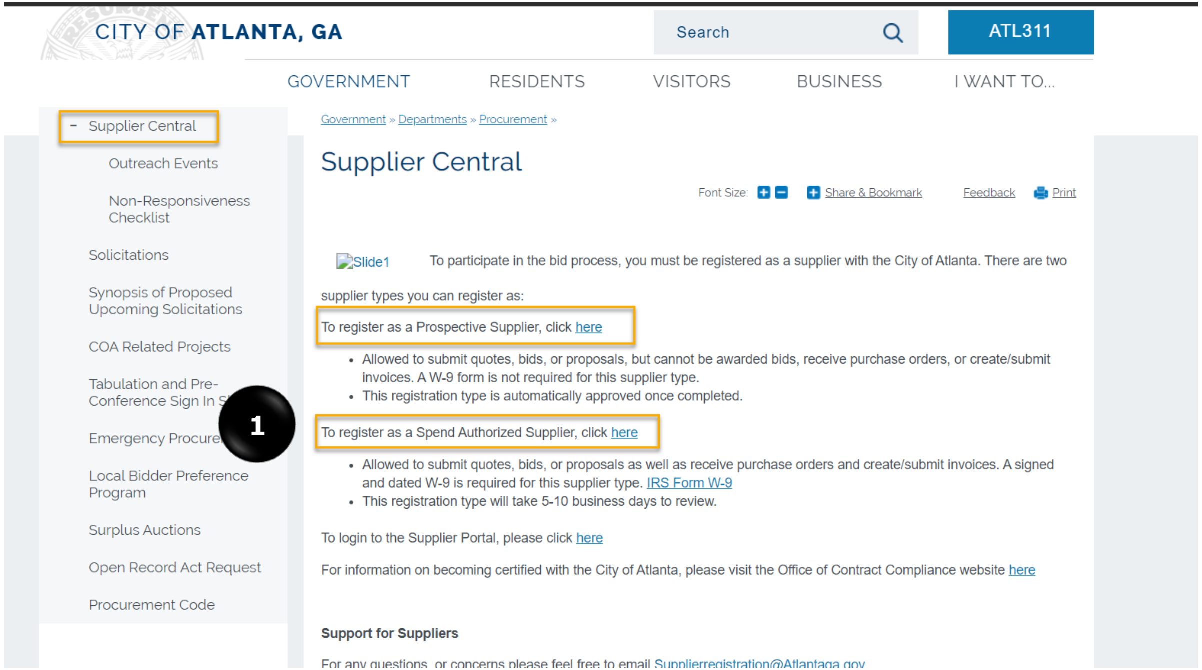
In this example, we will learn the steps of the external prospective supplier registration sub-process.

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



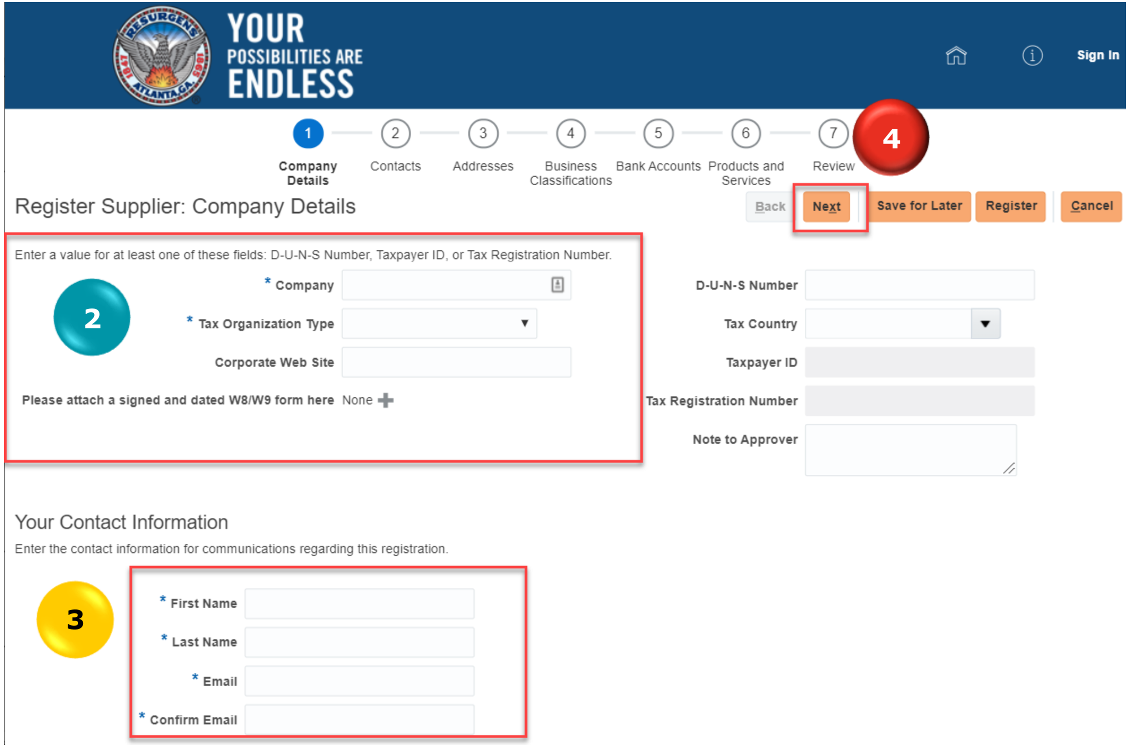
External Registration – Step 2 of 11

2 Enter the supplier company details.

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

3 Enter the contact information.

4 Click the **Next** button.



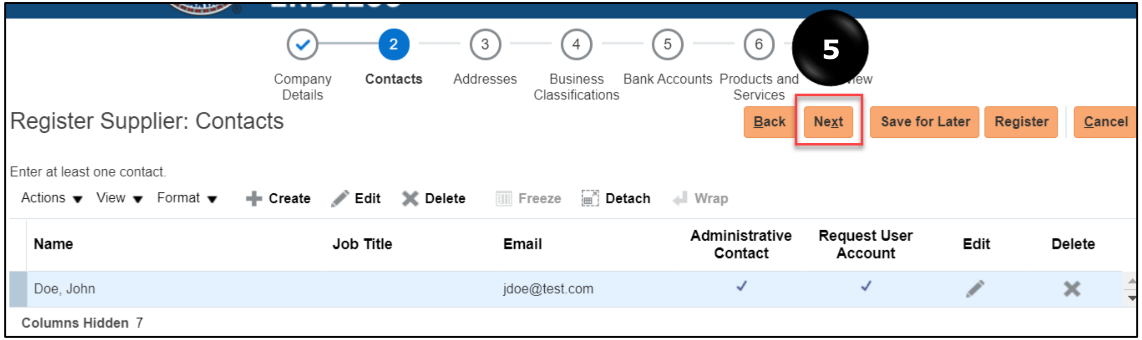
External Registration – Step 3 of 11

5

Click the **Next** button.

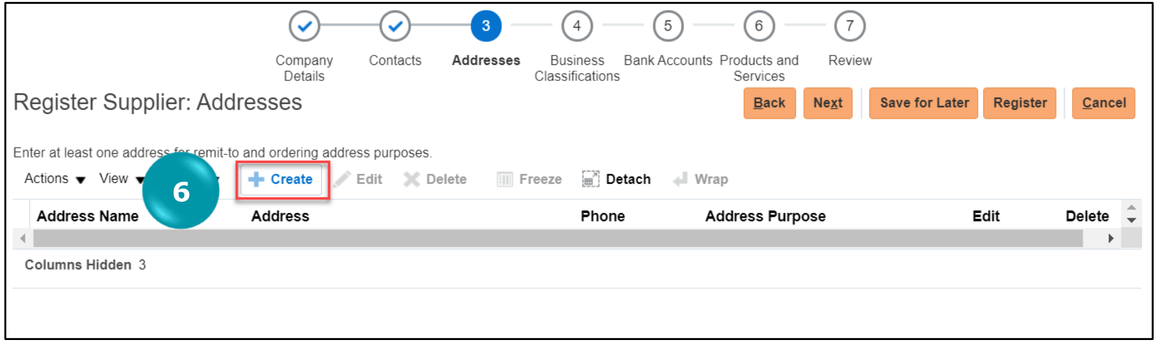
NOTE: This contact information automatically populated on this tab based on the contact information that was entered on the **Company Details** tab.

Click **Next**



6

Click the **+ Create** button to open the **Create Address** pop-up window.

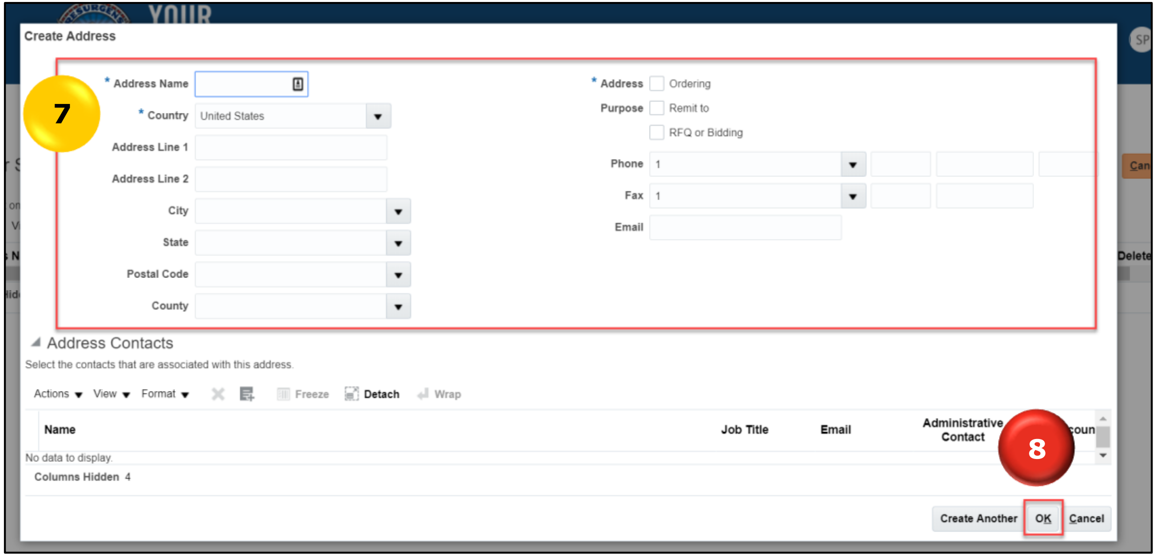


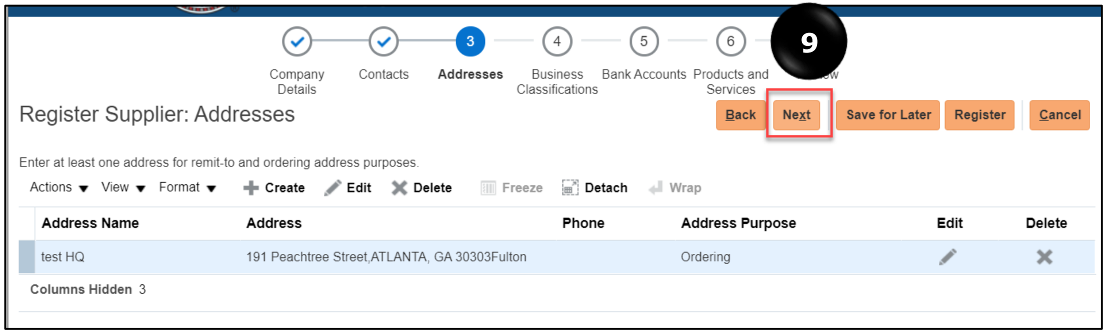
External Registration – Step 4 of 11

7 Enter the supplier address and contact information in the respective fields on the **Create Address** pop-up window.

8 Click the **OK** button.

9 Click the **Next** button to open the **Business Classifications** tab.



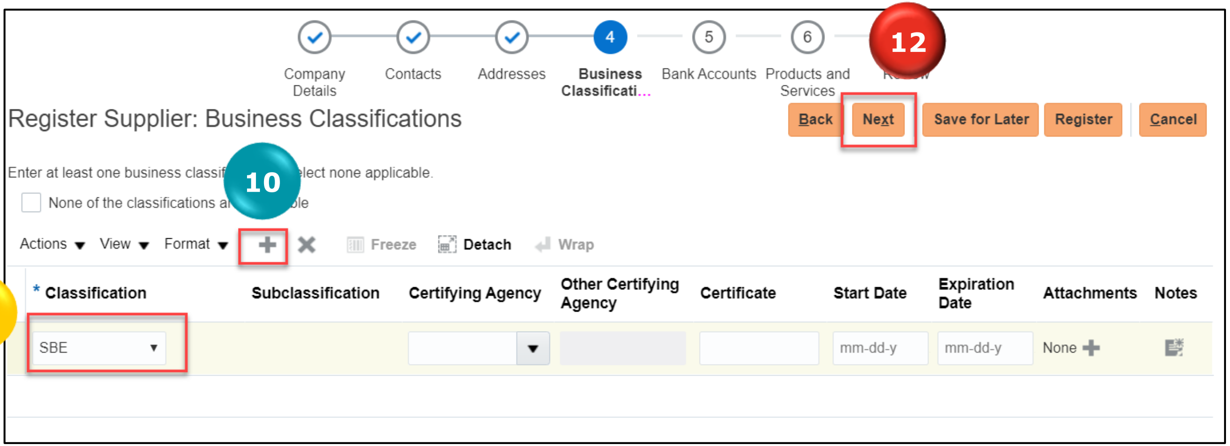


External Registration – Step 5 of 11

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.



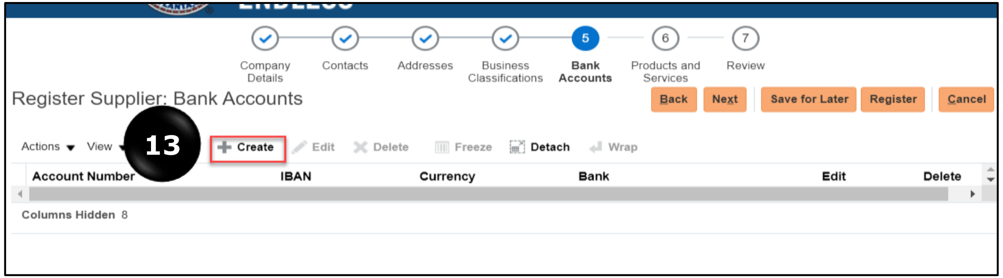
List of values for Certifying Agencies

Program	Classification	Sub-Classification	Certifying Agency	Certificate
EBO	MBE	AABE	City of Atlanta	AABE
EBO	MBE	HABE	City of Atlanta	AABE
EBO	MBE	APABE	City of Atlanta	AABE
EBO	MBE	NABE	City of Atlanta	NABE
EBO	FBE		City of Atlanta	FBE
SBO	SBE		City of Atlanta	SBE
SBOSM	SBE		City of Atlanta	SBE
DBE	DBE		G-DOT/MARTA	DBE
ACDBE	ACDBE		G-DOT/MARTA	ACDBE

External Registration – Step 6 of 11

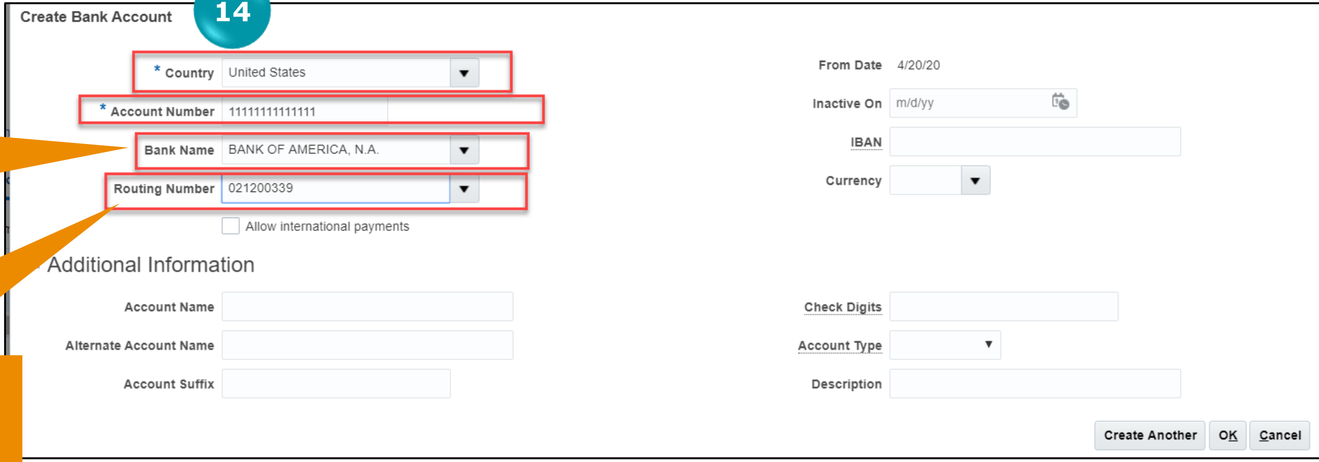
13 Click the **+ Create** button to open the **Create Bank Account** pop-up window.

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



Bank Name
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 Name is mandatory!



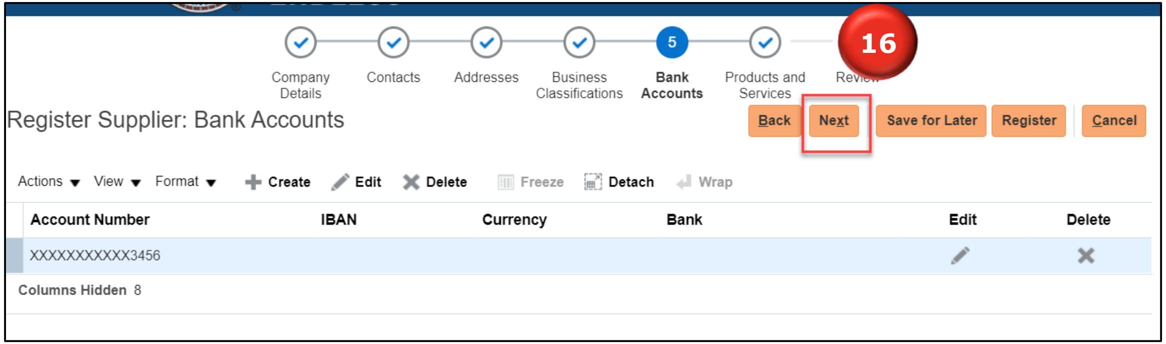
Routing Number
If you **do not see** your **Routing Number**, please contact **City of Atlanta Treasury to get Routing Number added (doftreasury@atlantaga.gov)**

Routing Number is mandatory!

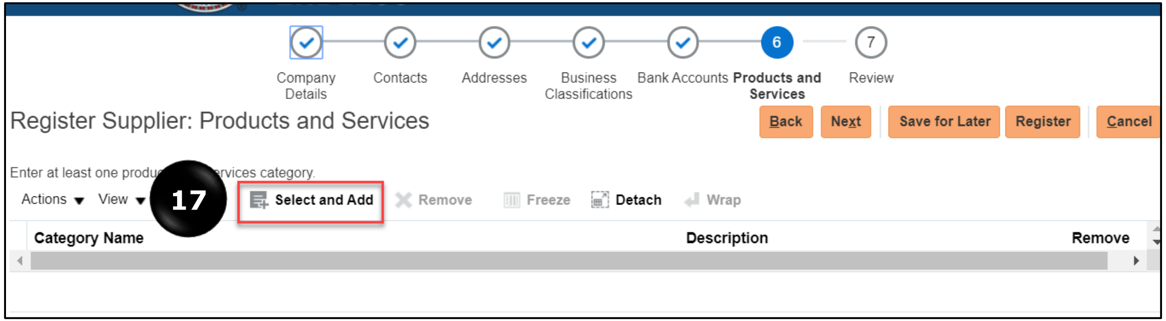
15 Click the **OK** button.

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

18

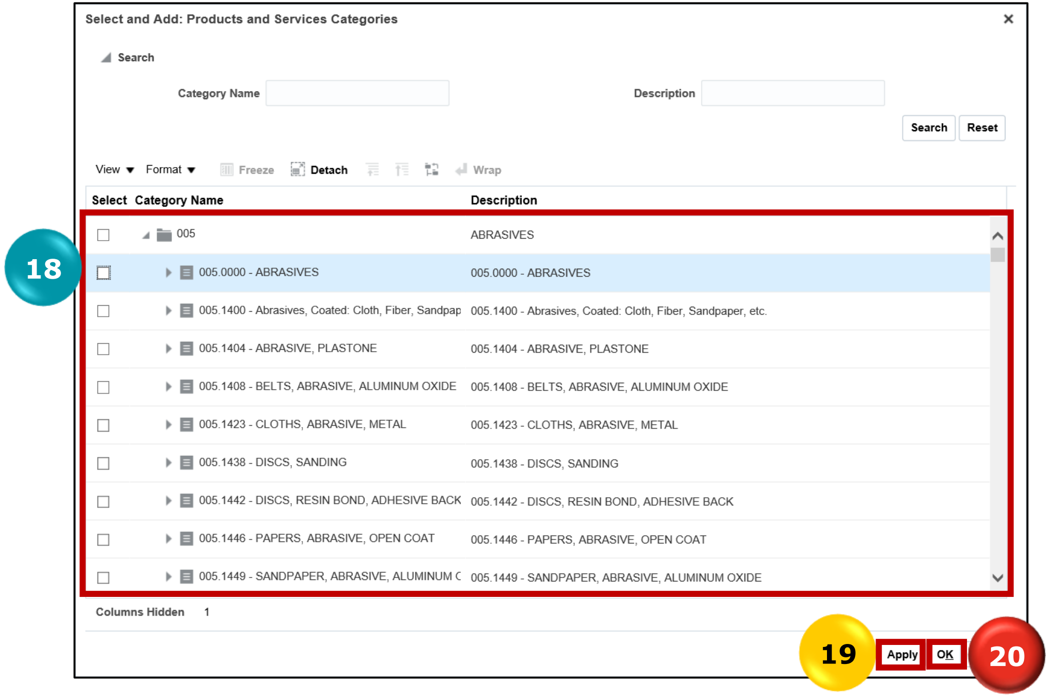
Add the **description** of, (preferably a one word description) the commodity or service in the **Category Name** field or in the Description field. Once the requested description has been found, Click the checkbox to select the categories and services.

19

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

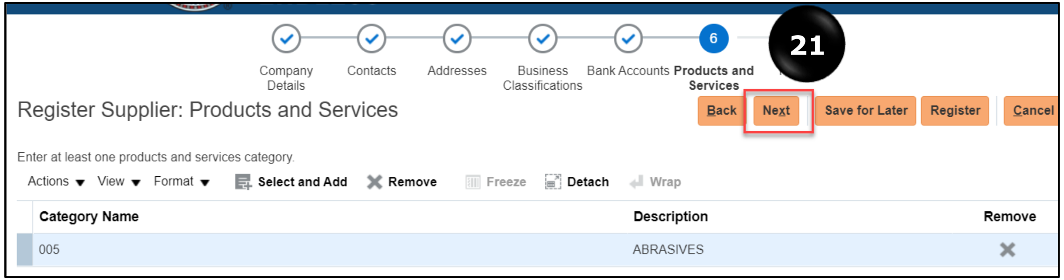
20

Click **OK**.



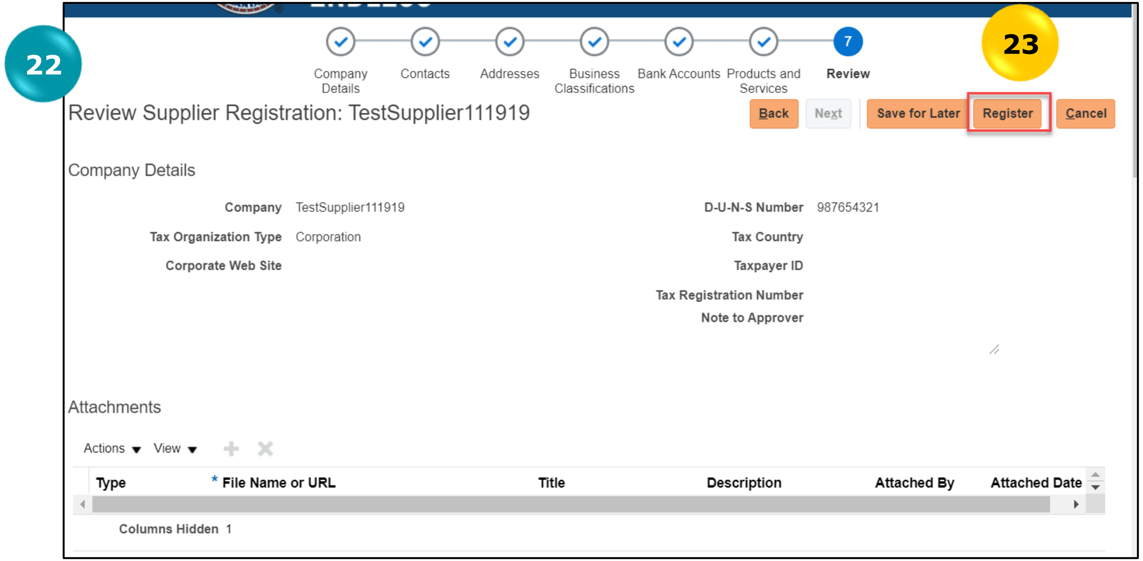
External Registration – Step 9 of 11

21 Click the **Next** button.



22 Review the information

23 Click the **Register** button to submit the registration request.



External Registration – Step 10 of 11

24

An Approval e-mail is sent to registered E-mail ID with **Registration Request Details**.

25

Another e-mail with **Assigned Roles** and **Description** of each roles is sent to the registered E-mail ID.

----- 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, 10:50:40 AM EDT
Subject: Supplier Registration Request 4001 Was Approved

Your registration request to be a supplier for City of Atlanta (City of Atlanta) was approved.

Registration Request Details

Registration Request	4001
Request Date	07/23/2018
Requested By	JANE DOE
Company	FG COMPANY

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Assignee	JANE DOE	Supplier	FG COMPANY
Assigned Date	7/23/18 2:51 PM	Supplier Number	100035
Expiration Date	8/22/18 2:51 PM		
Task Number	275675		

Recommended Actions

You were granted access to the supplier application for City of Atlanta. The user name and password for your user account will be sent in a separate e-mail.
Access the application.

User Account Details

Assigned Roles

Role	Description
	Manages invoices and payments for the supplier

25

External Registration – Step 11 of 11

26

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.

https://ehxr-dev2.fa.us2.oraclecloud.com:443/hcmUI/faces/ResetPassword?ase.gid=29d662af6ba34fe8bb29860cd4d48bff

For any issues, contact your system administrator.

26

Thank You,
Oracle Fusion Applications

Supplier Portal Overview and Manage Profile

Lesson Agenda

Lesson	Duration
Lesson 1 : Onboard New Supplier	30 mins
Lesson 2 : Supplier Portal Overview	**15 mins**
Lesson 3 : Supplier Portal Key Functionalities	40 mins
Course Summary	5 mins

Supplier Portal Overview – Step 1 of 2

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 solicitations, 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:

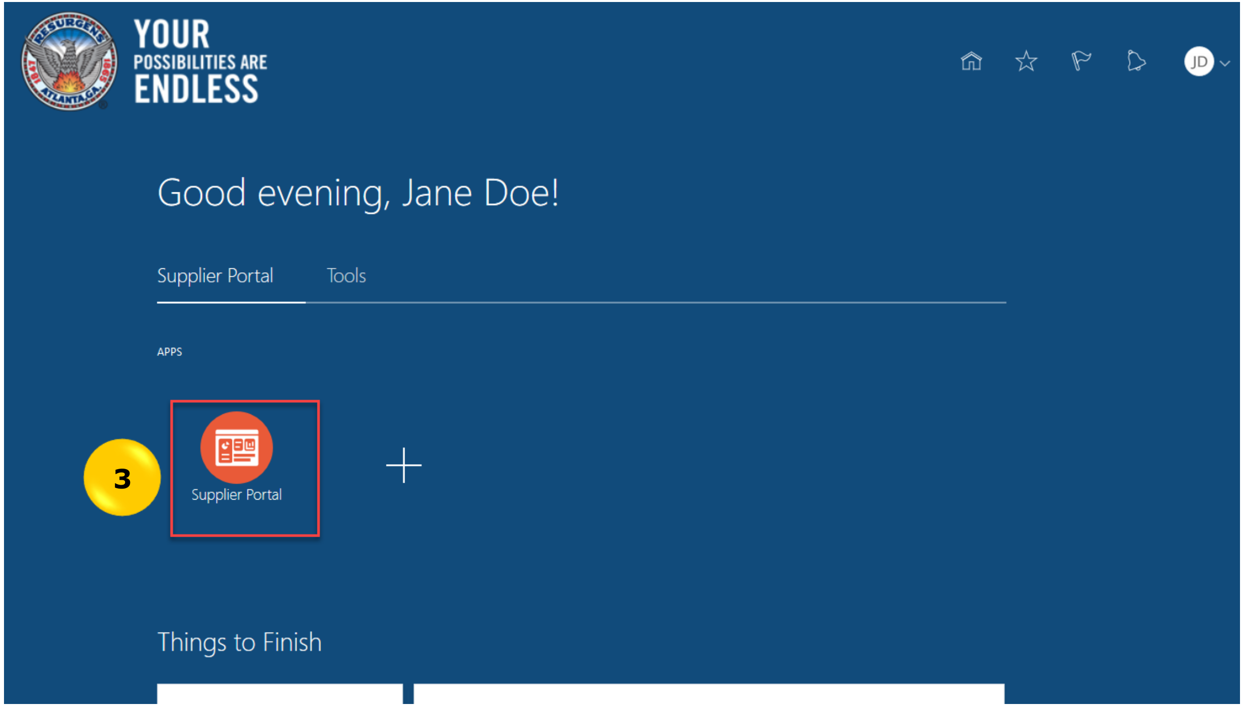
1 Enter the **User ID** and **Password.**

2 Click the **Sign In** button.

Supplier Portal Overview – Step 2 of 2

3

Click the **Supplier Portal** icon to open the Supplier Portal page.



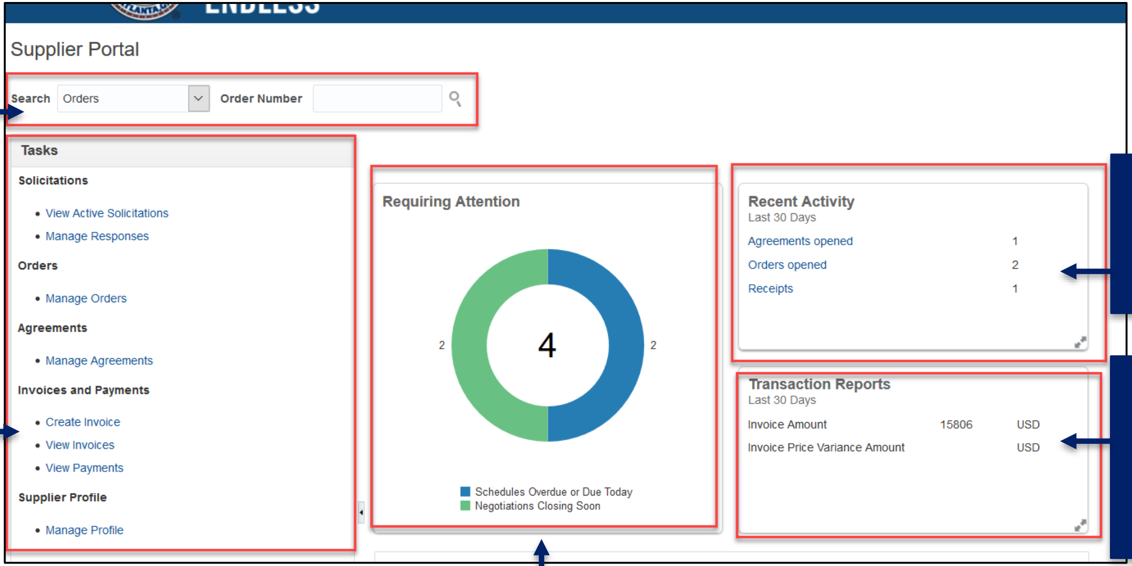
NOTE: We will learn about the steps to manage negotiations from Supplier Profile in the Sourcing courses.

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 includes, orders, agreements, and solicitations (negotiations).



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.

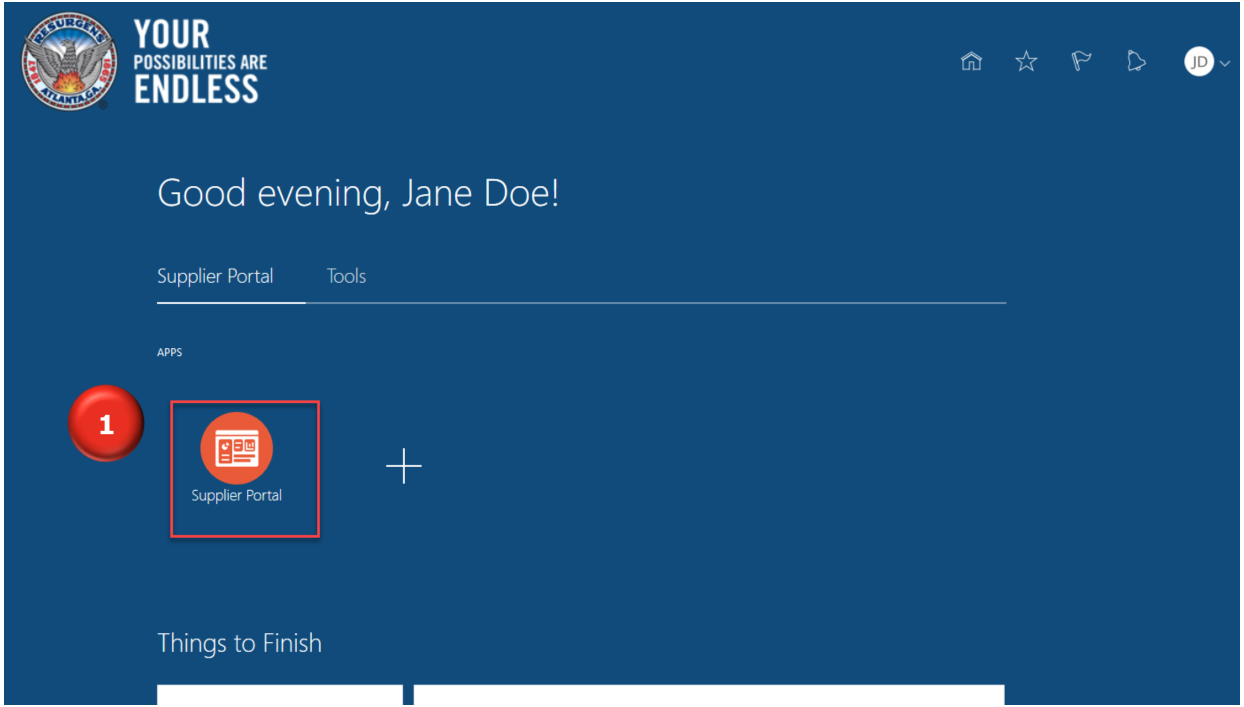
Use the Requiring Attention section to view the graphical representation of the tasks that require immediate attention. For example, the graph in the above screenshot shows that the supplier has 10 items that require their attention. The items include one agreement to author task, three solicitations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

Edit Supplier Profile

Edit Profile – Step 1 of 13

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

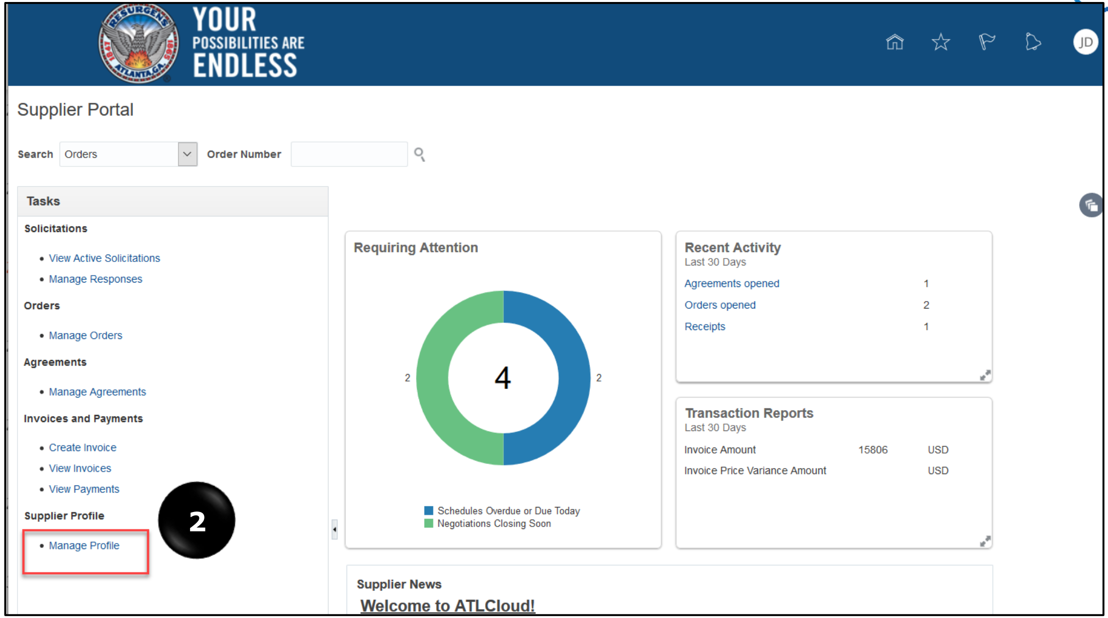
1 Click **Supplier Portal**.

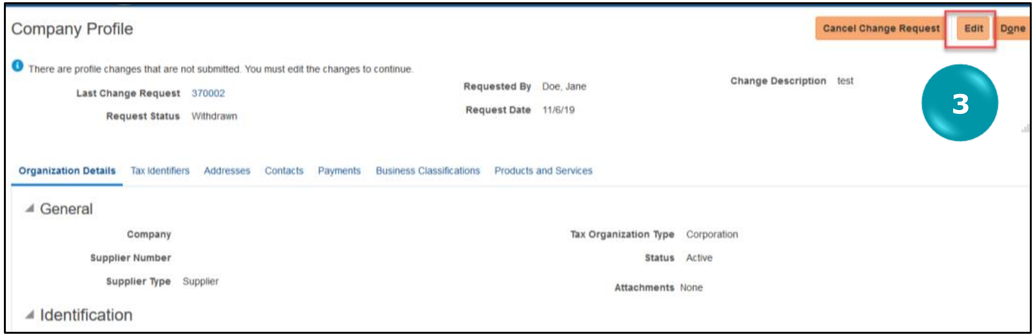


Edit Profile – Step 2 of 13

2 Click **Manage Profile**.

3 Company Profile screen is displayed. Click **Edit**.

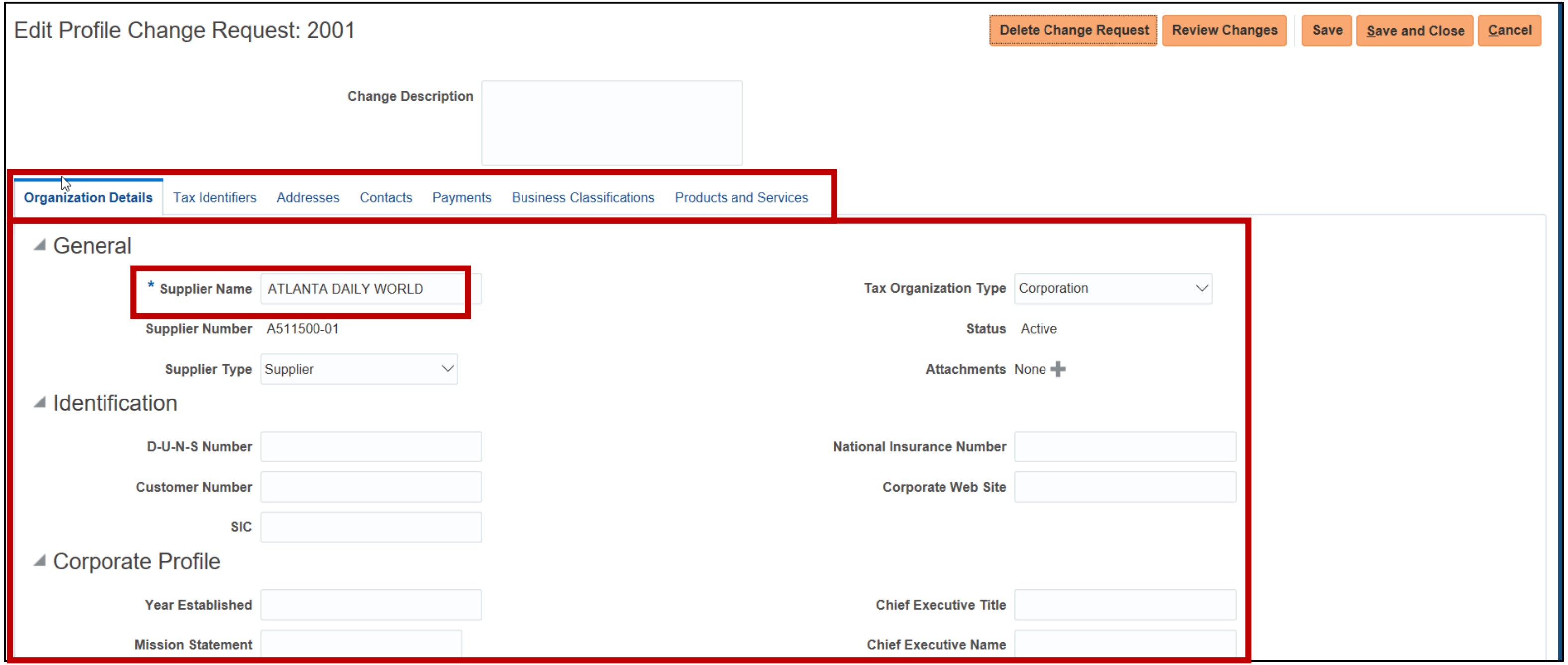




Edit Profile – Step 3 of 13

Edit Profile Change Request screen is displayed. Profile updates can be made to Organization Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications and Products and services.

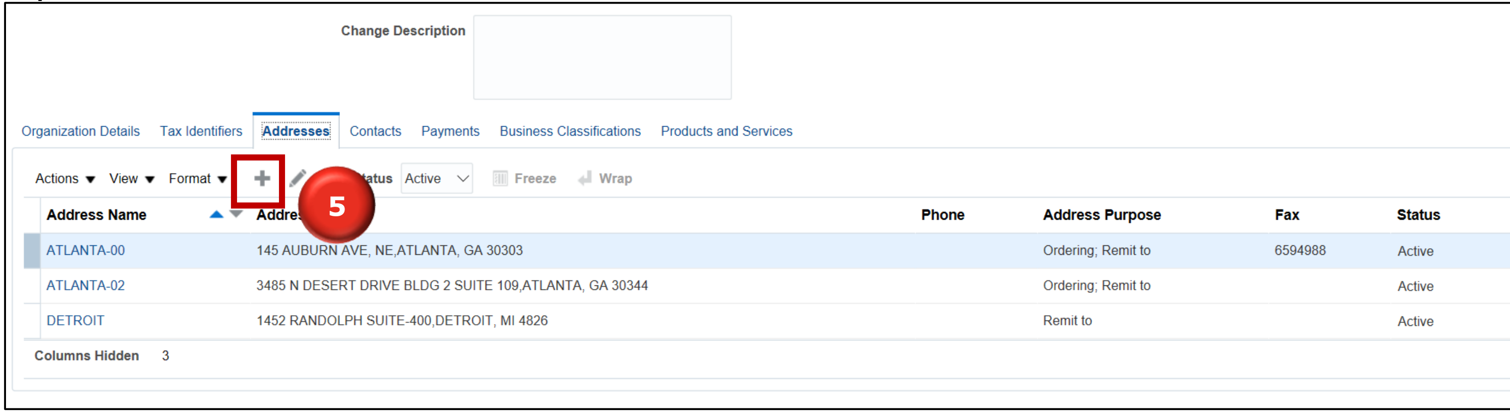
4 Click Organization Details tab.



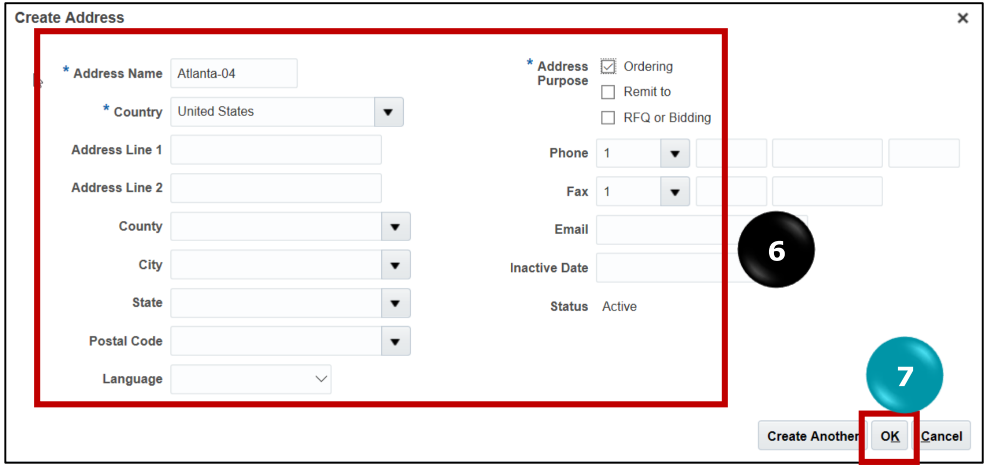
Edit Profile – Step 4 of 13

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

5 To add a new Address, Click "+".



6 Enter the required **Details**.

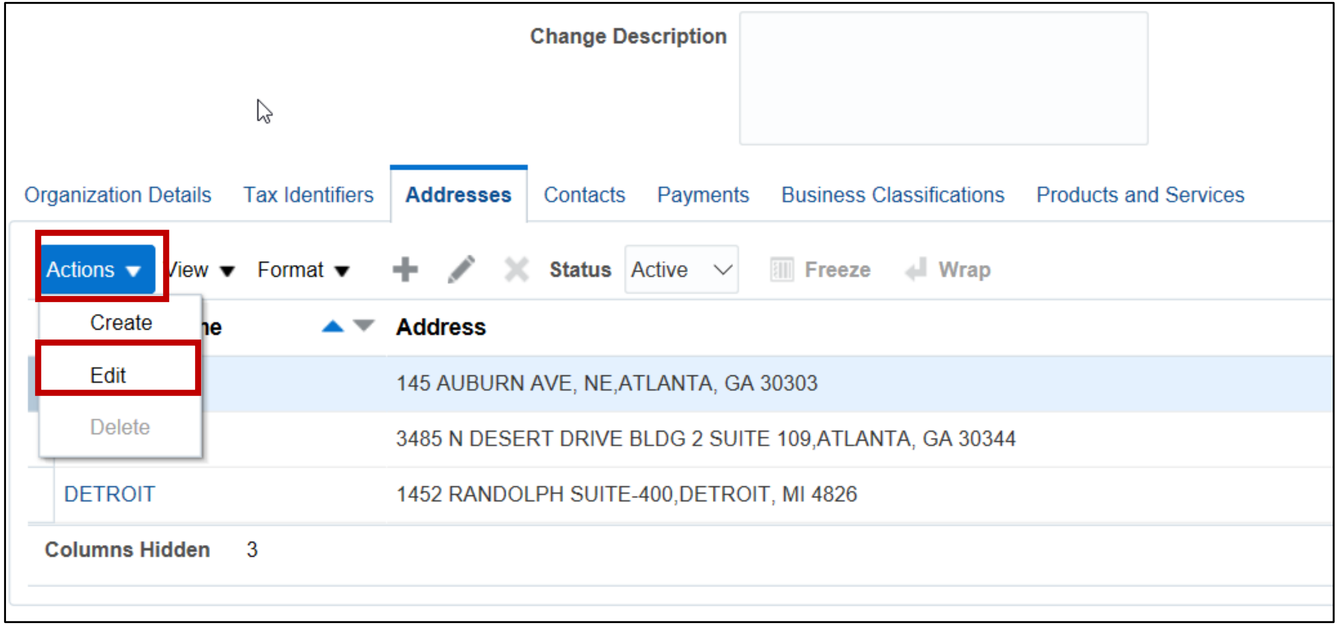


7 Click **OK**.

Edit Profile – Step 5 of 13

8

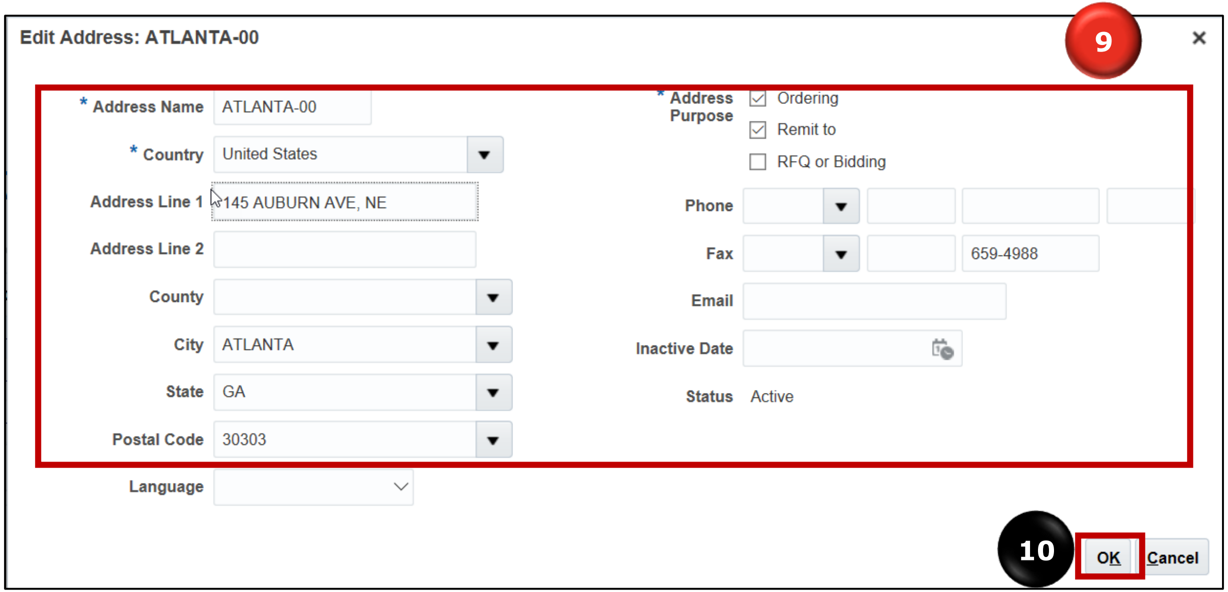
To edit an Address, click **Edit** under **Actions**.



Edit Profile – Step 6 of 13

9 Enter the appropriate **fields.**

10 Click **OK**.

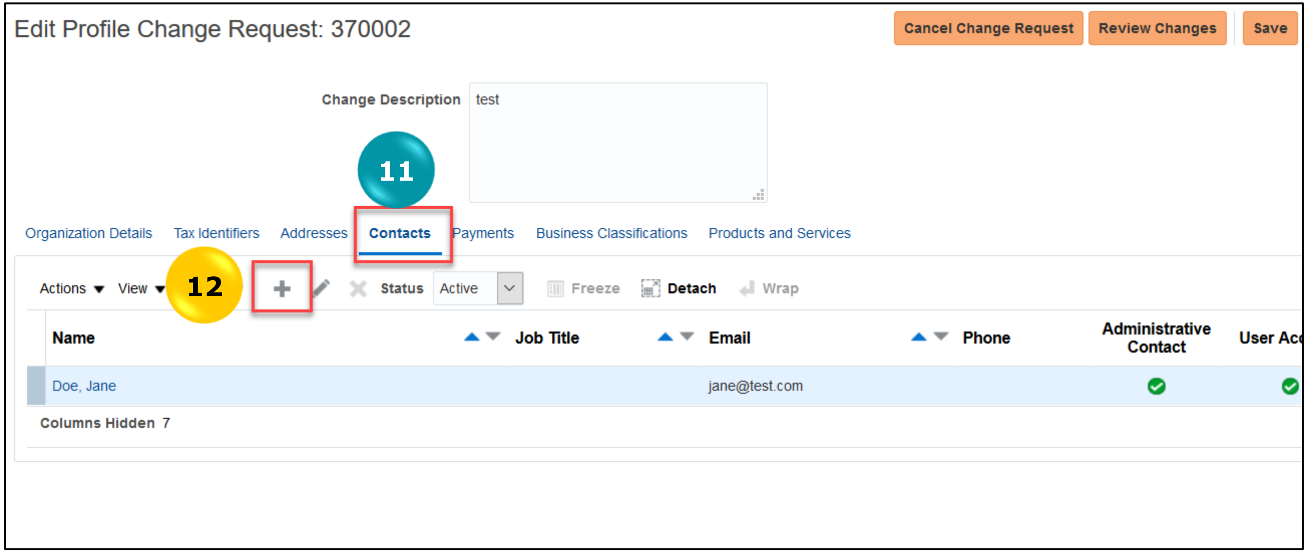


Edit Profile – Step 7 of 13

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

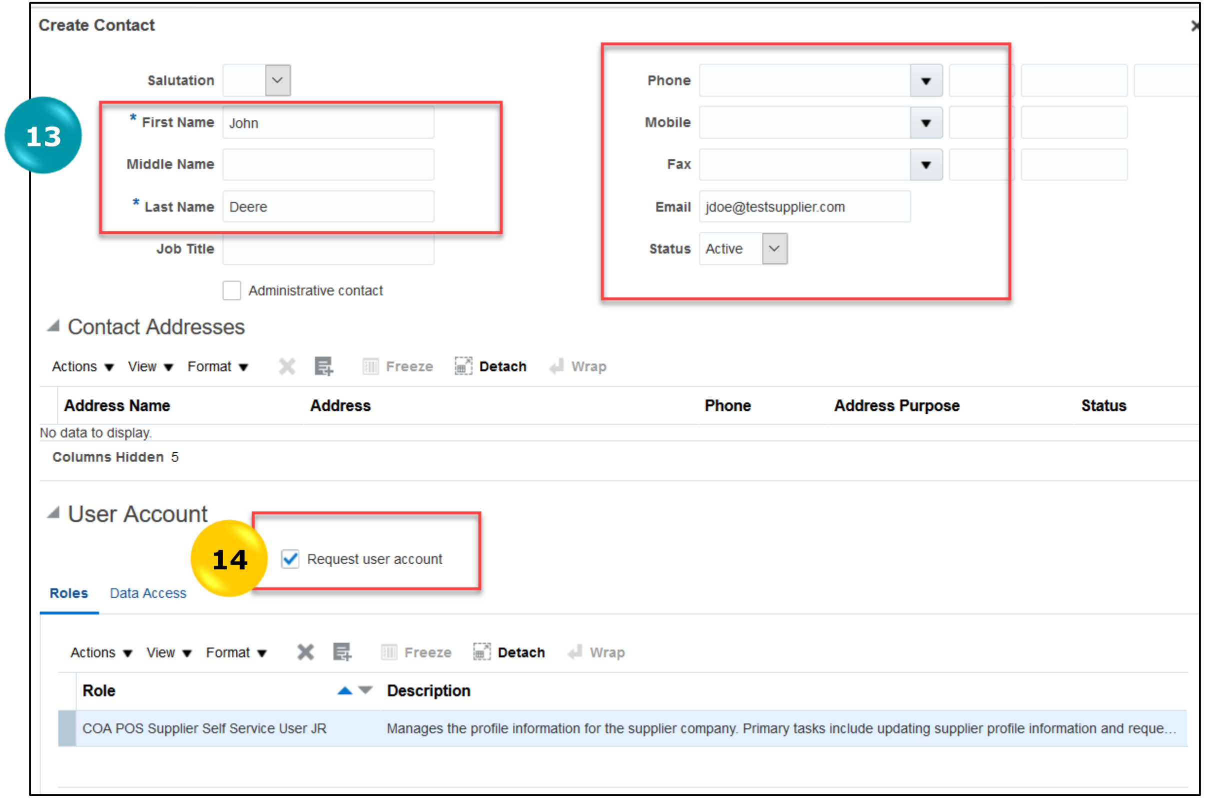


Edit Profile – Step 8 of 13

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.

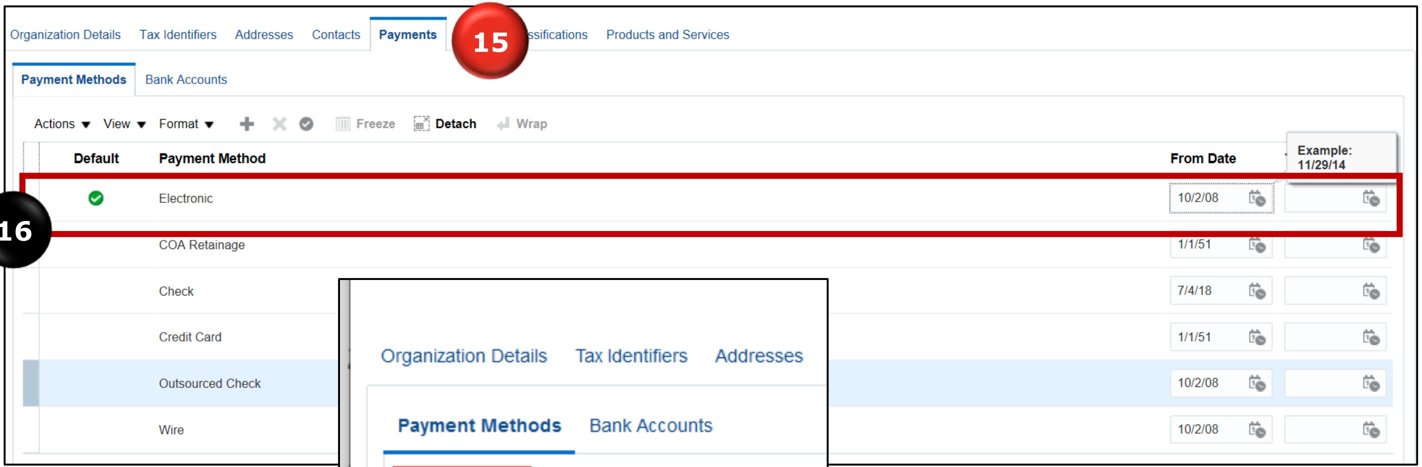


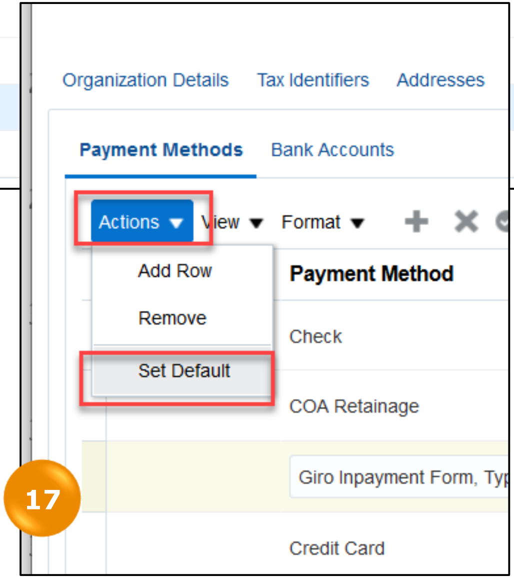
Edit Profile – Step 9 of 13

Let's look at the steps for updating Payment Method.

15 Click **Payments** Tab

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



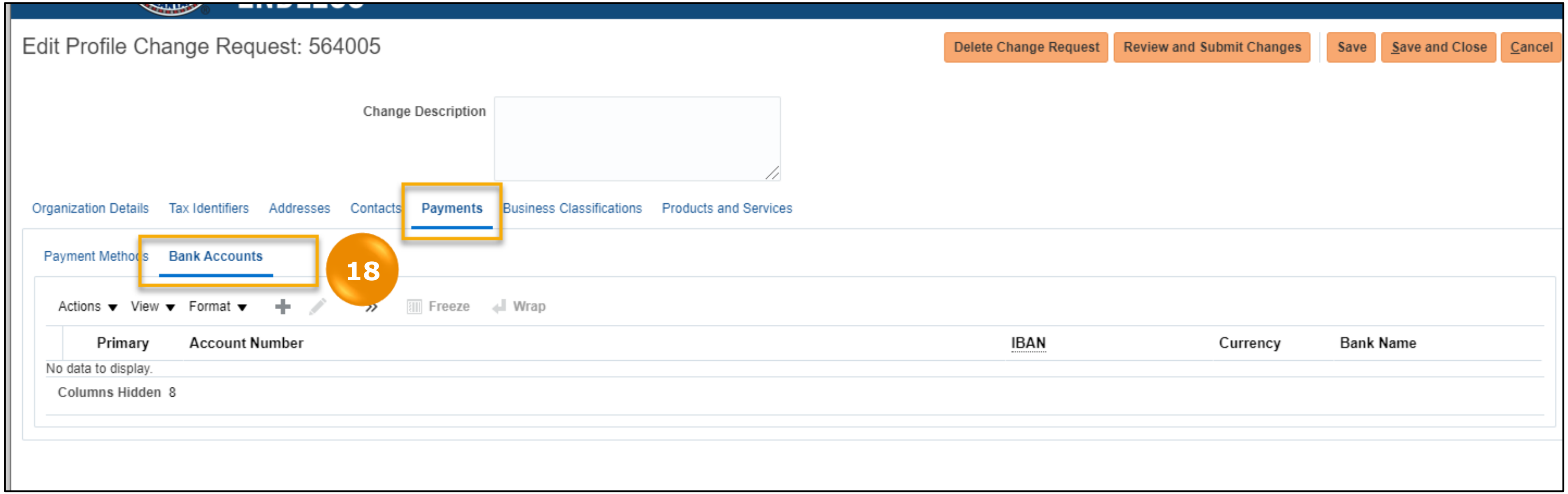


17 Click **Actions > Set Default**.

Edit Profile – Step 10 of 13

Let's look at the steps for updating Bank Accounts.

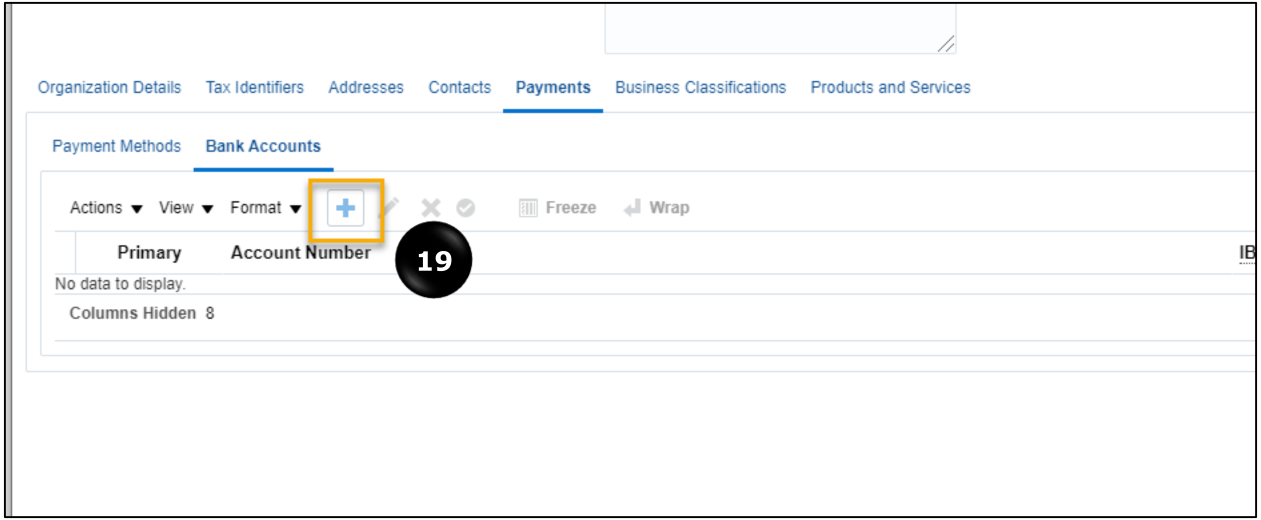
18 Under the **Payments** tab, click **Bank Accounts**



Edit Profile – Step 11 of 13

19

Click the **+ Create** button to open the **Create Bank Account** pop-up window.

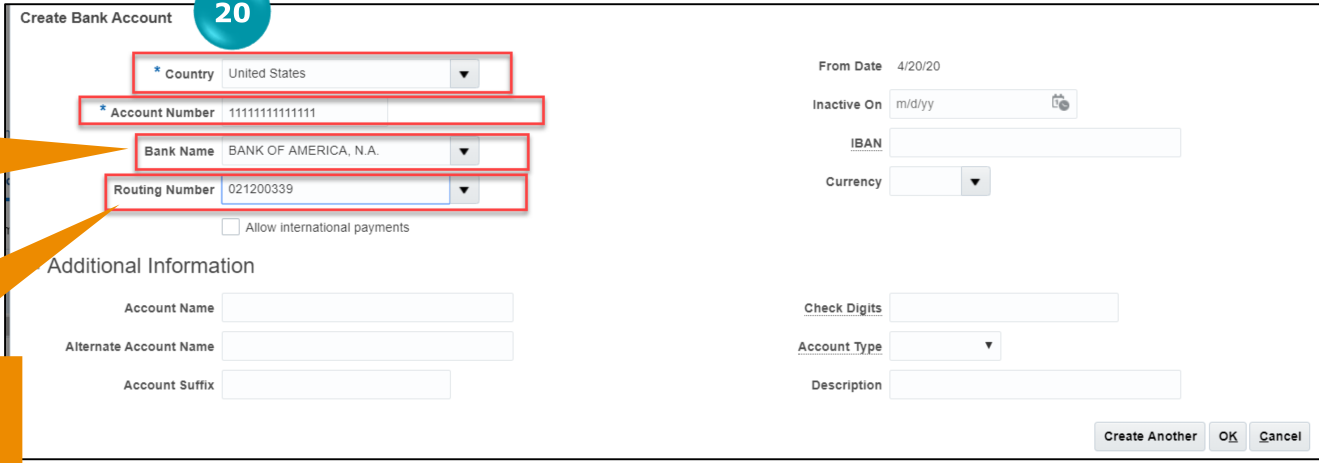


Edit Profile – Step 12 of 13

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

Bank Name
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 Name is mandatory!

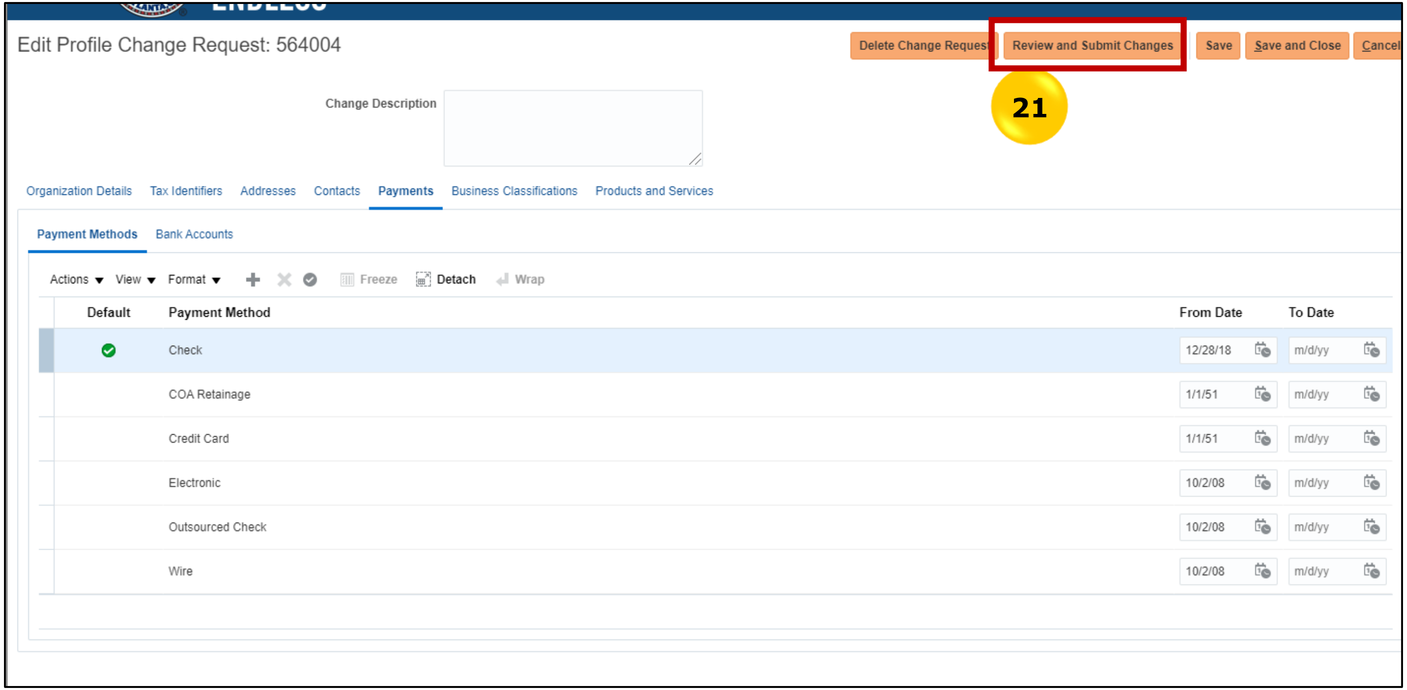


Routing Number
If you **do not see** your **Routing Number**, please contact **City of Atlanta Treasury to get Routing Number added** (doftreasury@atlantaga.gov)

Routing Number is mandatory!

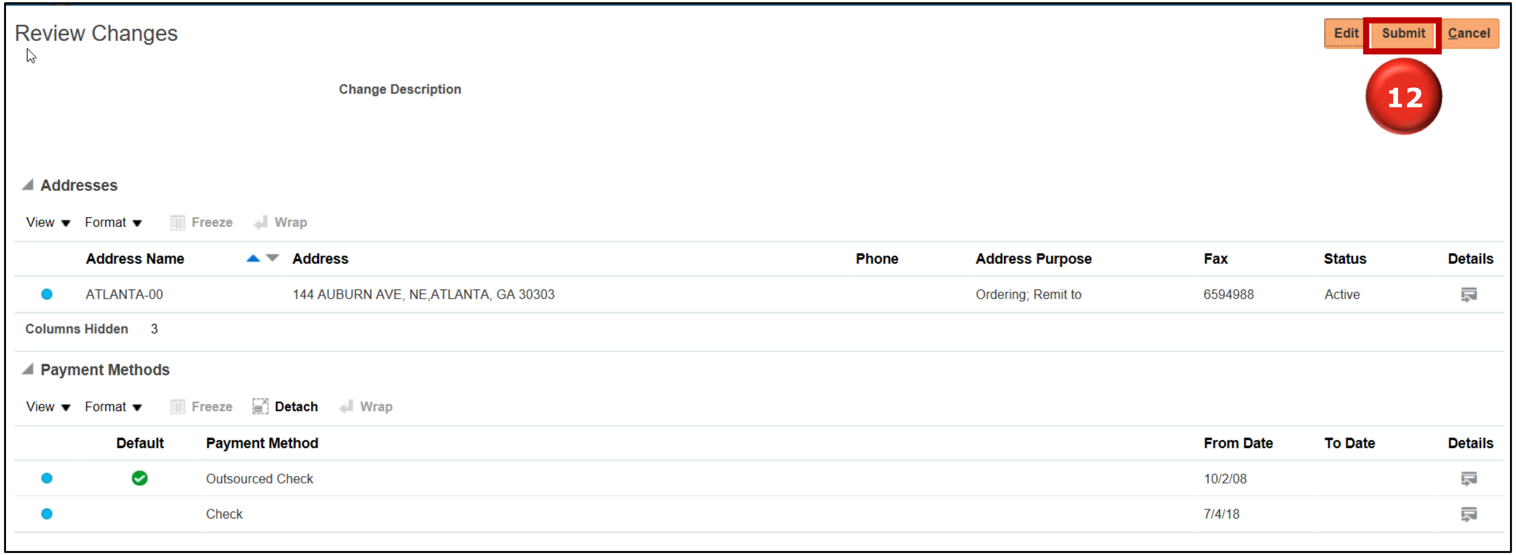
Edit Profile – Step 13 of 13

21 Click **Save** and **Review and Submit Changes.**



Submit

12 Click **Submit.** Changes submitted for 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

Lesson Agenda

Lesson	Duration
Lesson 1 : Onboard New Supplier	30 mins
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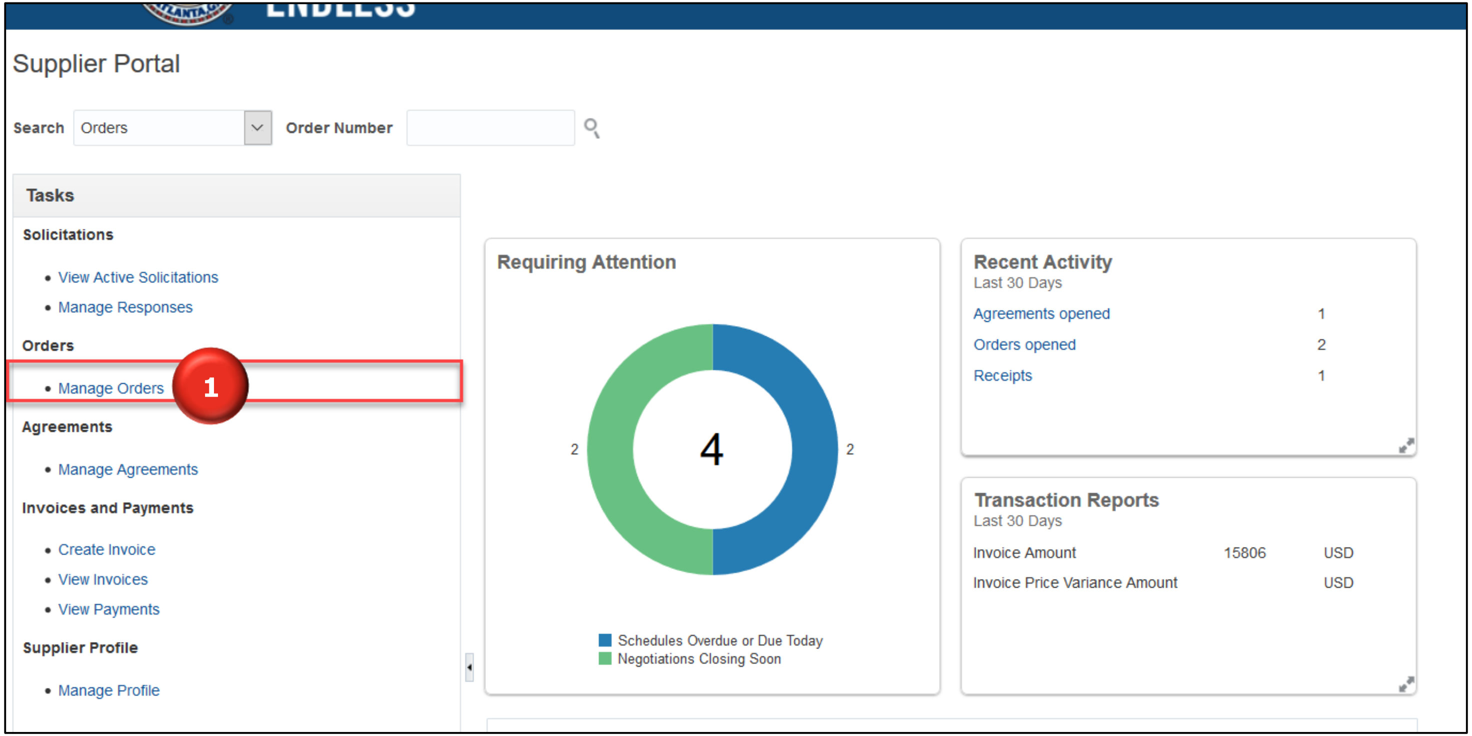
Course Summary	5 mins

Manage Orders – Step 1 of 3

Let's look at the steps to Manage Orders.

1 On **Supplier Portal,** click Manage Orders.



Manage Orders – Step 2 of 3

Manage Orders screen is displayed.

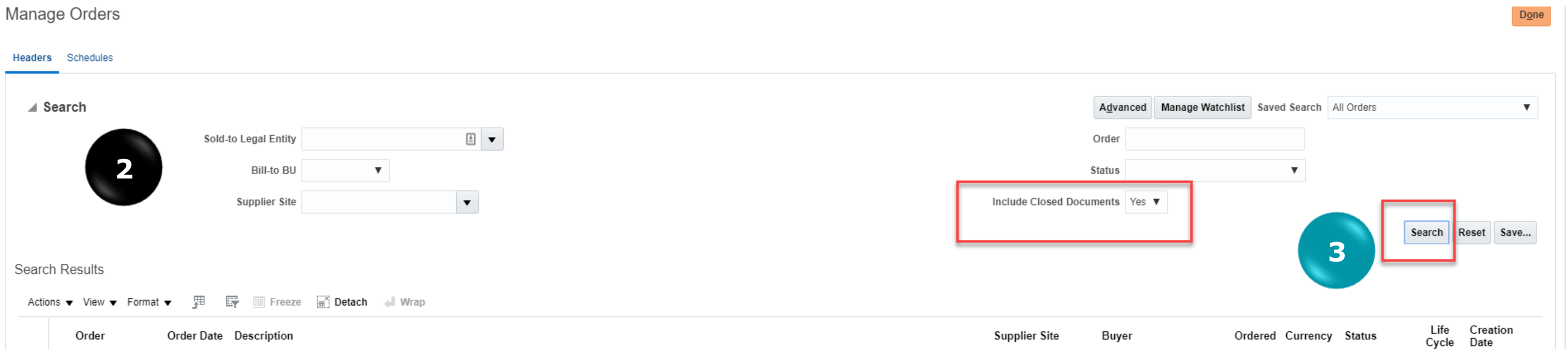
2

Enter the appropriate **field(s)** as needed.

3

Click **Search**.

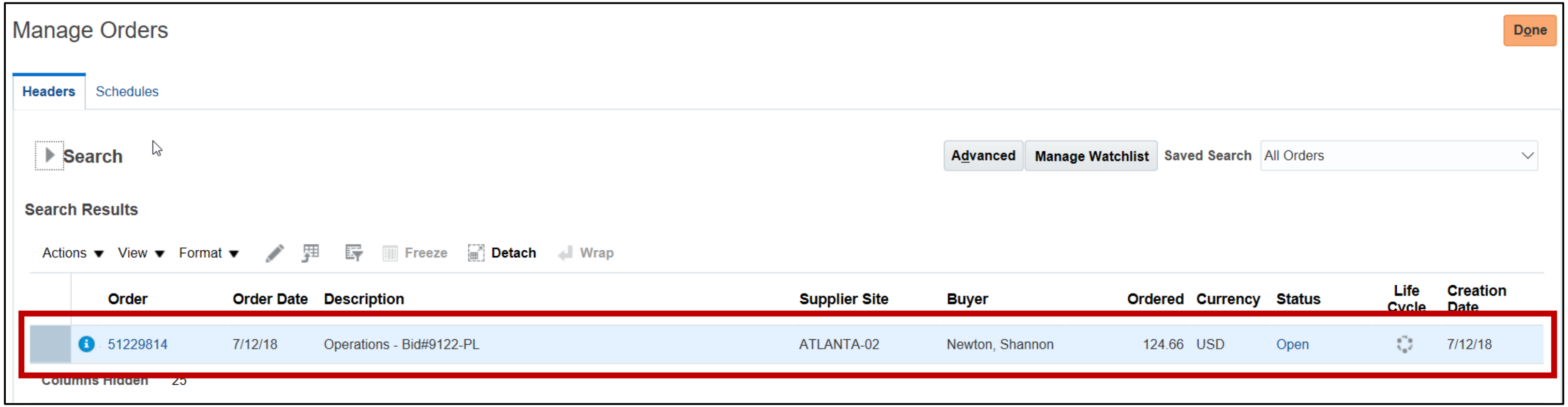
You can just click search and it will pull all PO’s for you



Manage Orders – Step 3 of 3

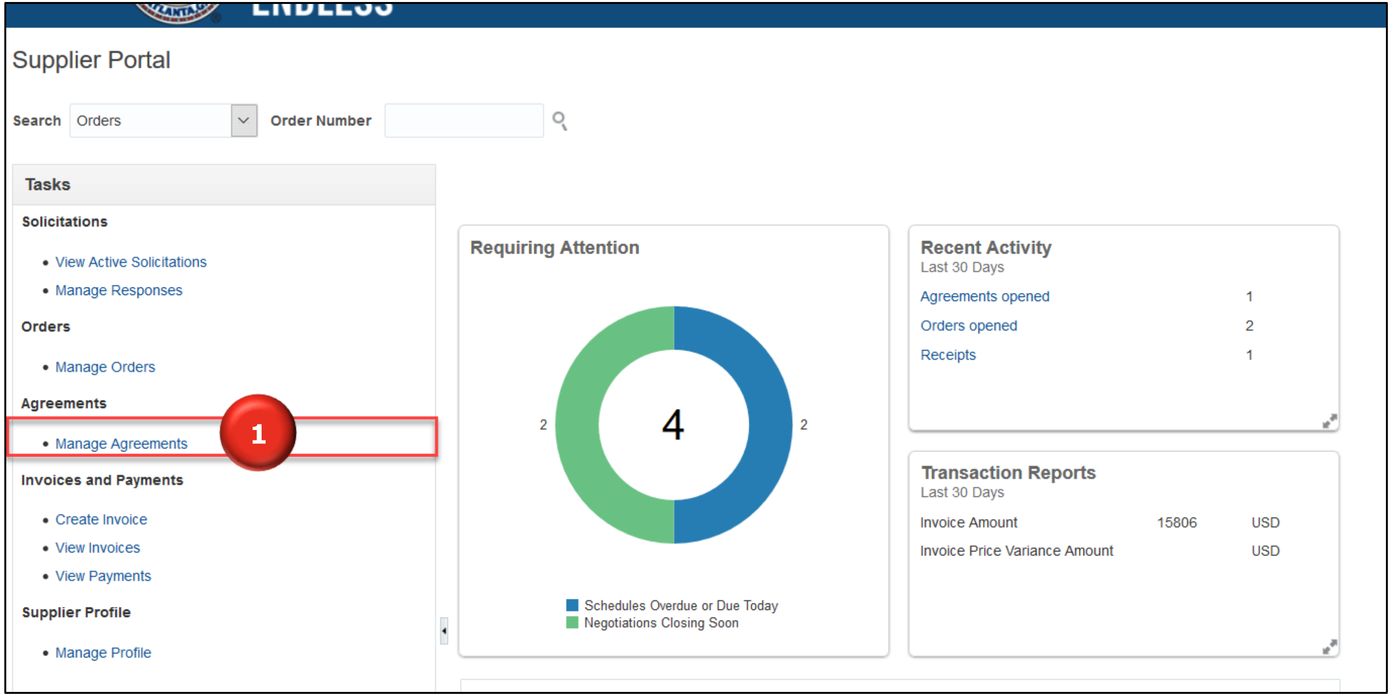
4

Search results are displayed.
Appropriate Order can be reviewed.



Manage Agreements – Step 1 of 2

1 Click **Manage Agreements**.

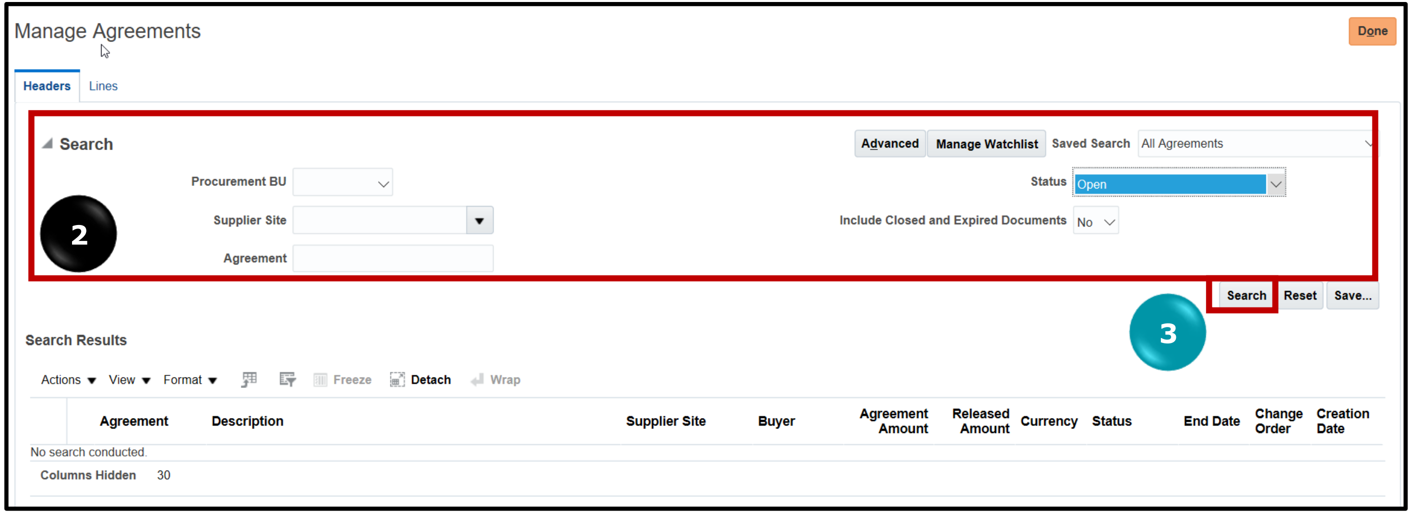


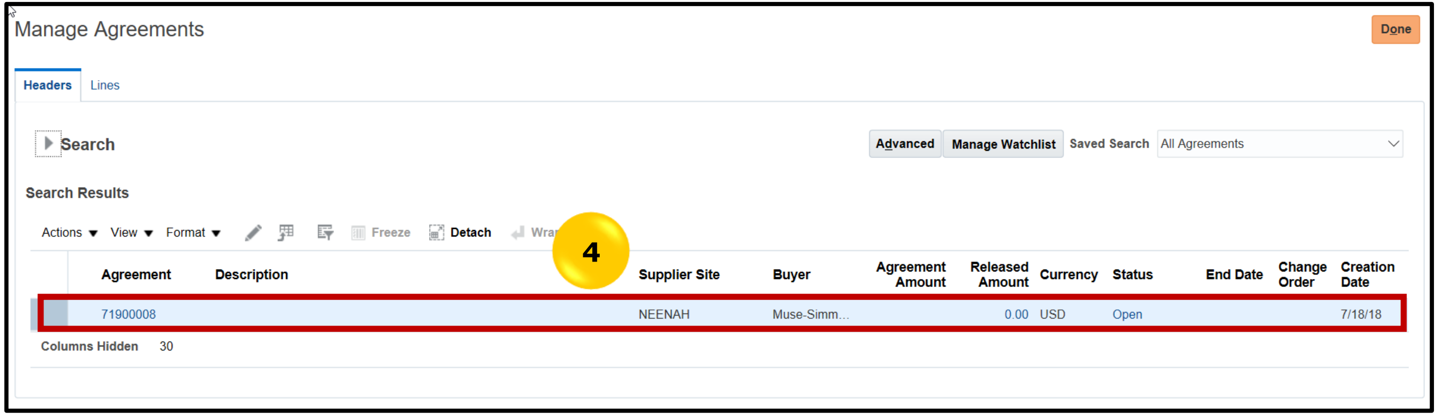
Manage Agreements – Step 2 of 2

2 Enter the appropriate **field(s)**.

3 Click **Search**.

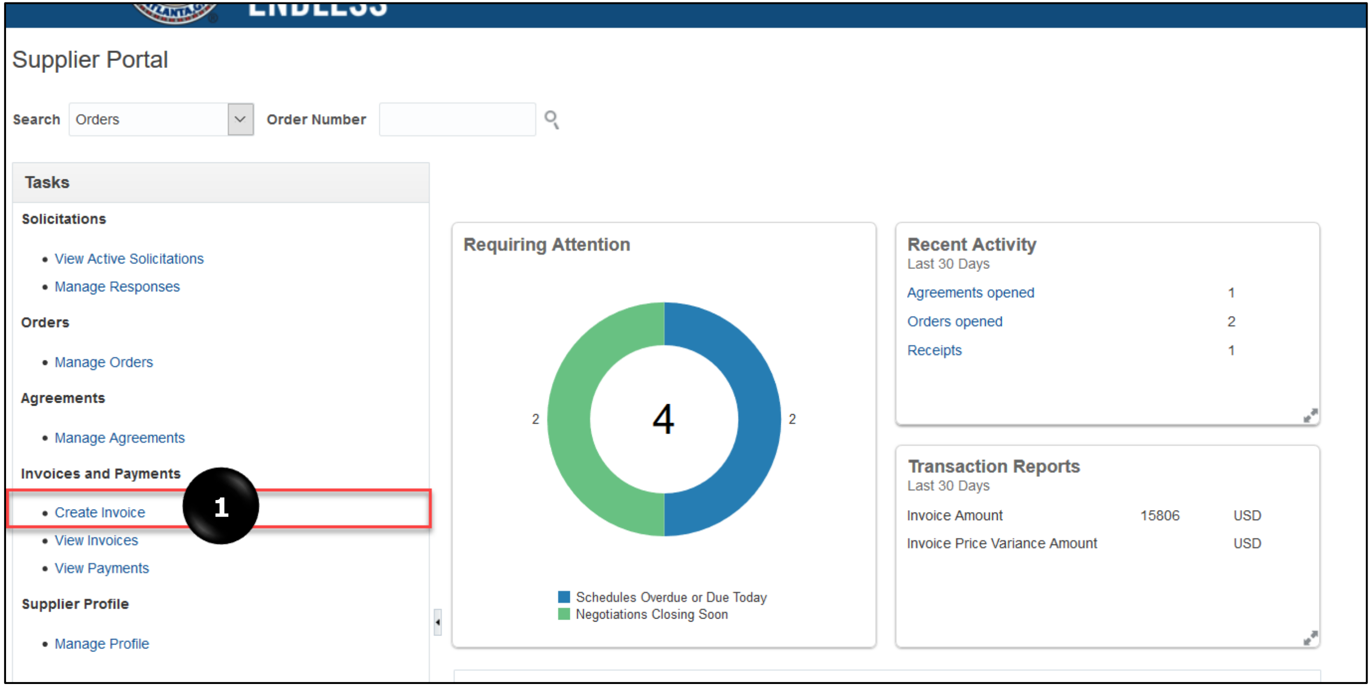
4 **Search Results** are displayed. Appropriate Agreement can be reviewed.





Create Invoice – Step 1 of 5

1 Click **Create Invoice**.

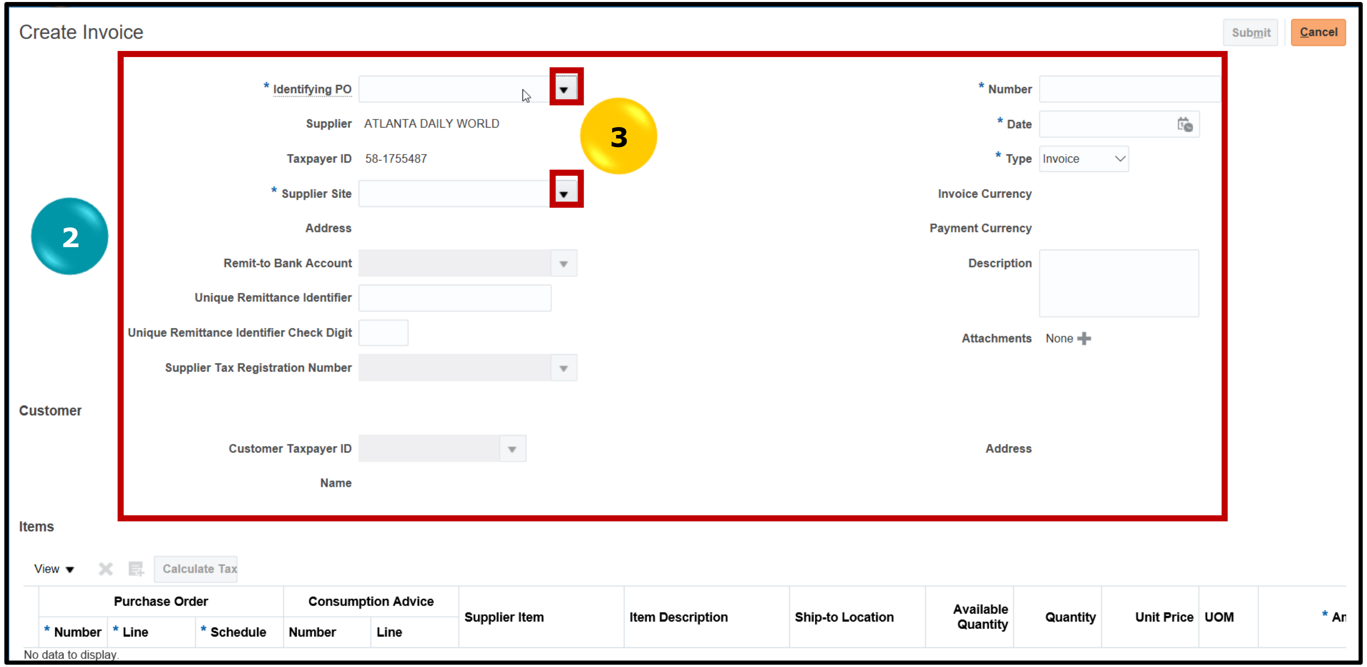


Create Invoice – Step 2 of 5

Create Invoice screen is displayed.

2 Enter the appropriate **field(s)**.

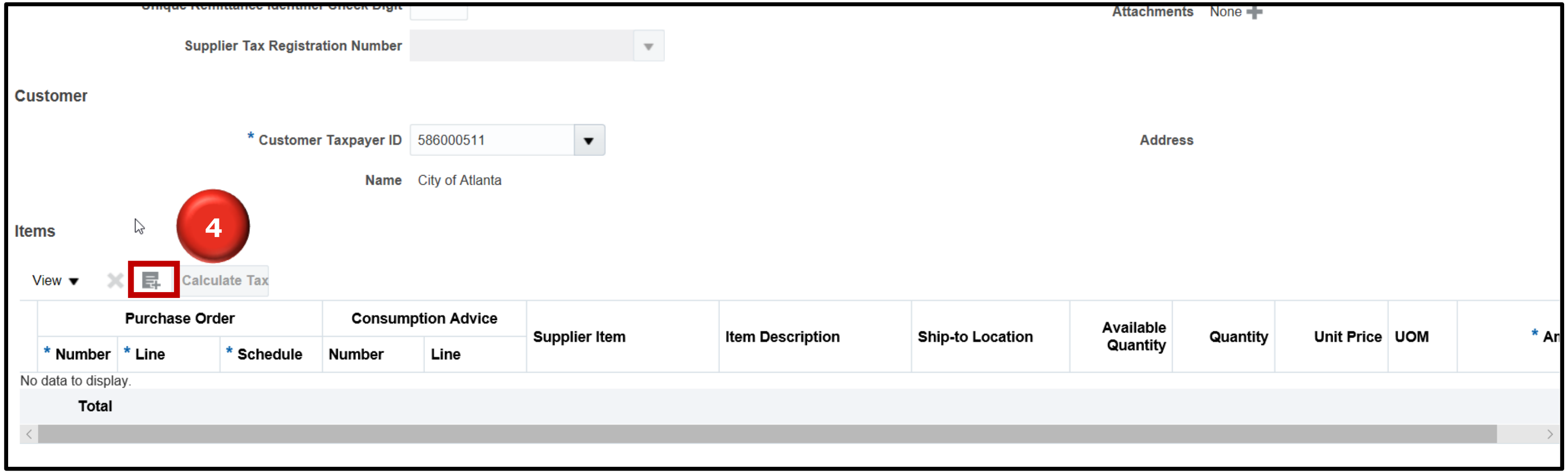
3 To select **Identifying PO** and **Supplier Site**, click **drop-down**.



Create Invoice – Step 3 of 5

4

To add a line item, Click
"**+**" (Select and Add)

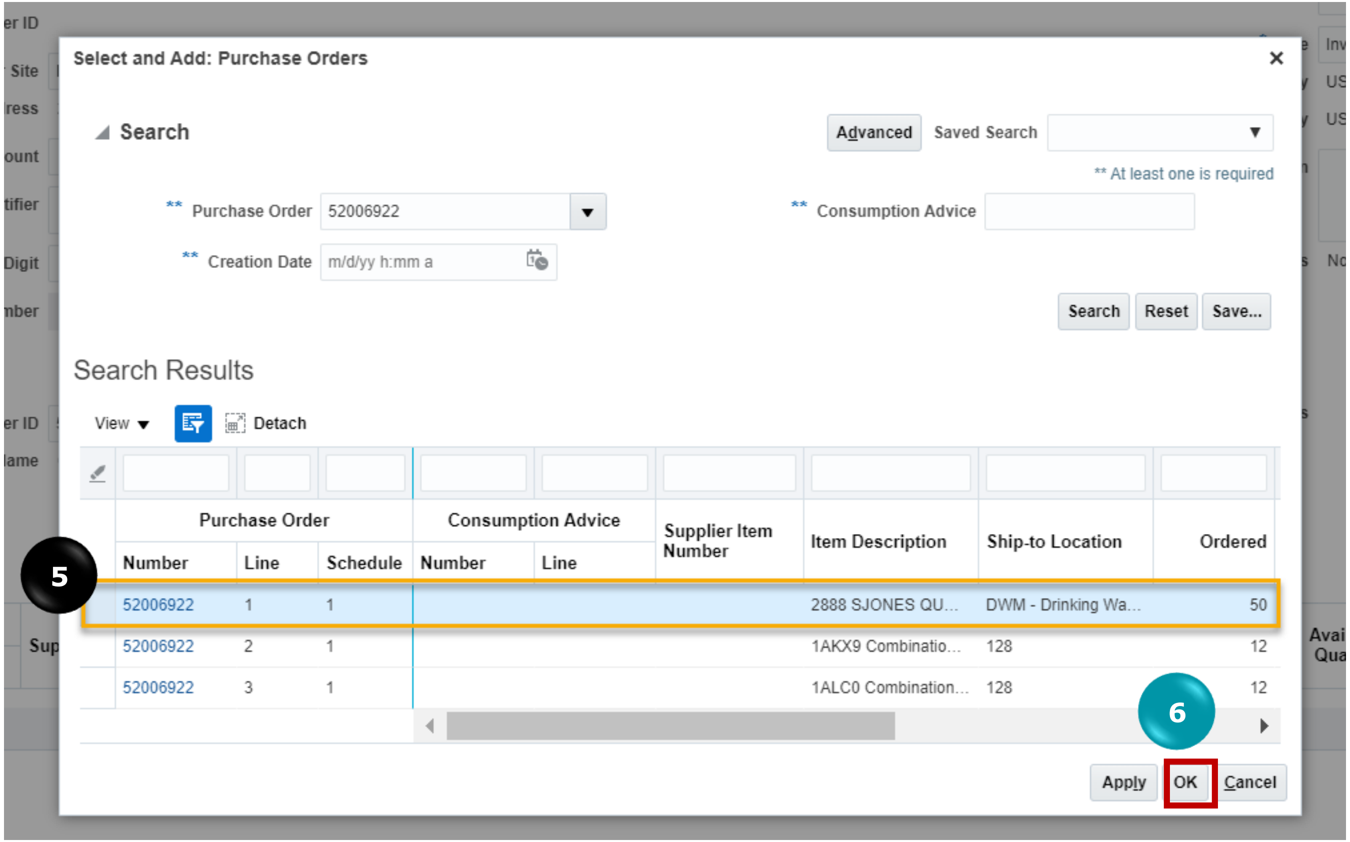


Create Invoice – Step 4 of 5

Select and Add pop-up is displayed.

5 Highlight the appropriate row for the **line item**.

6 Click **OK**.



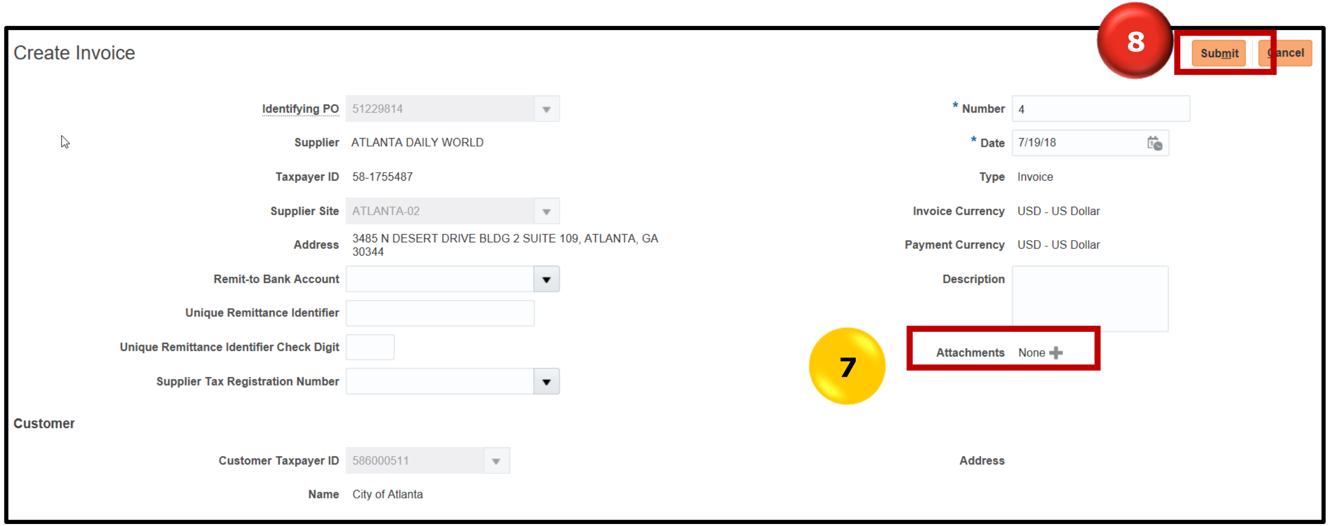
Create Invoice – Step 5 of 5

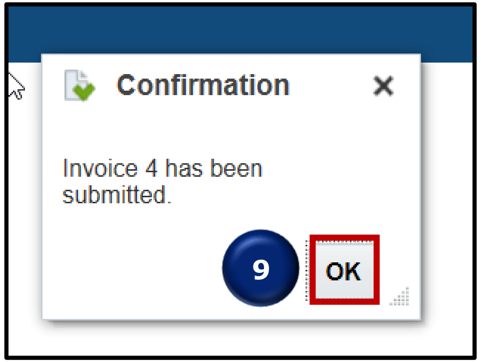
7 **Attachments** are ***required***.

Attach your **invoice** before you submit.

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

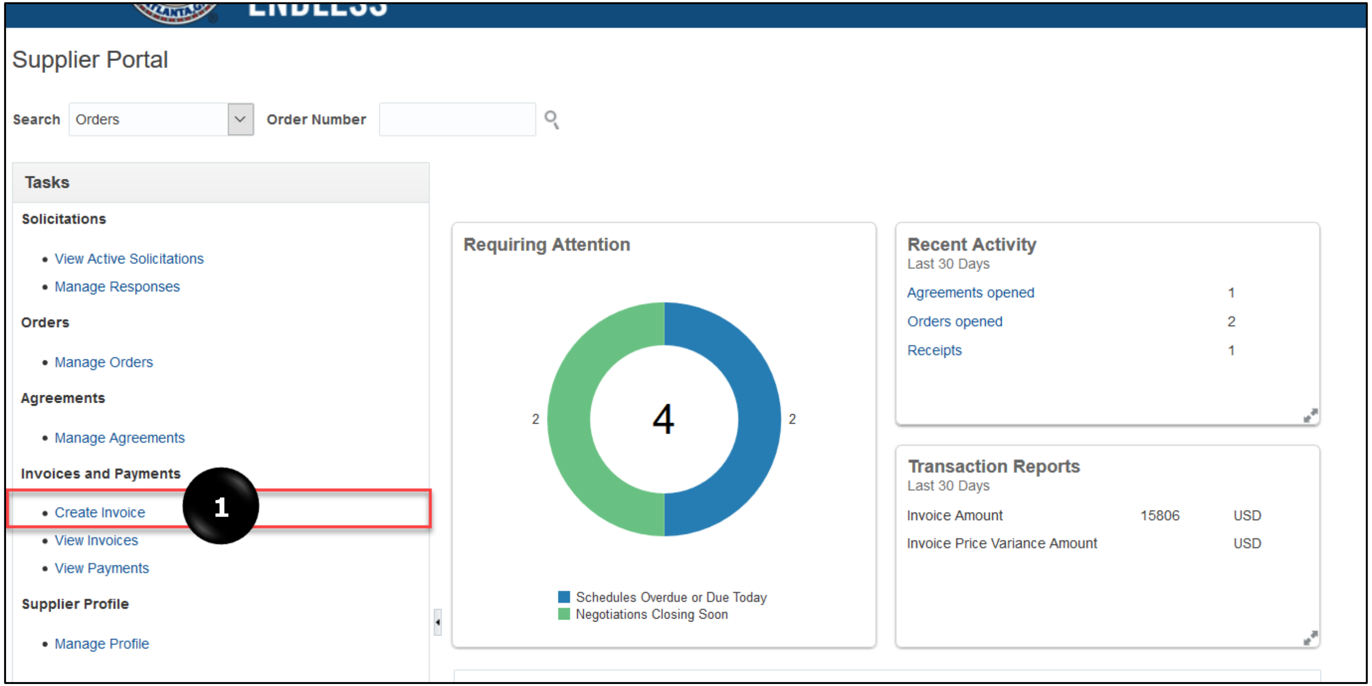
9 Click **Submit**.





Create Credit Memo – Step 1 of 5

1 Click **Create Invoice**.



Create Credit Memo – Step 2 of 5

2 Enter appropriate fields.

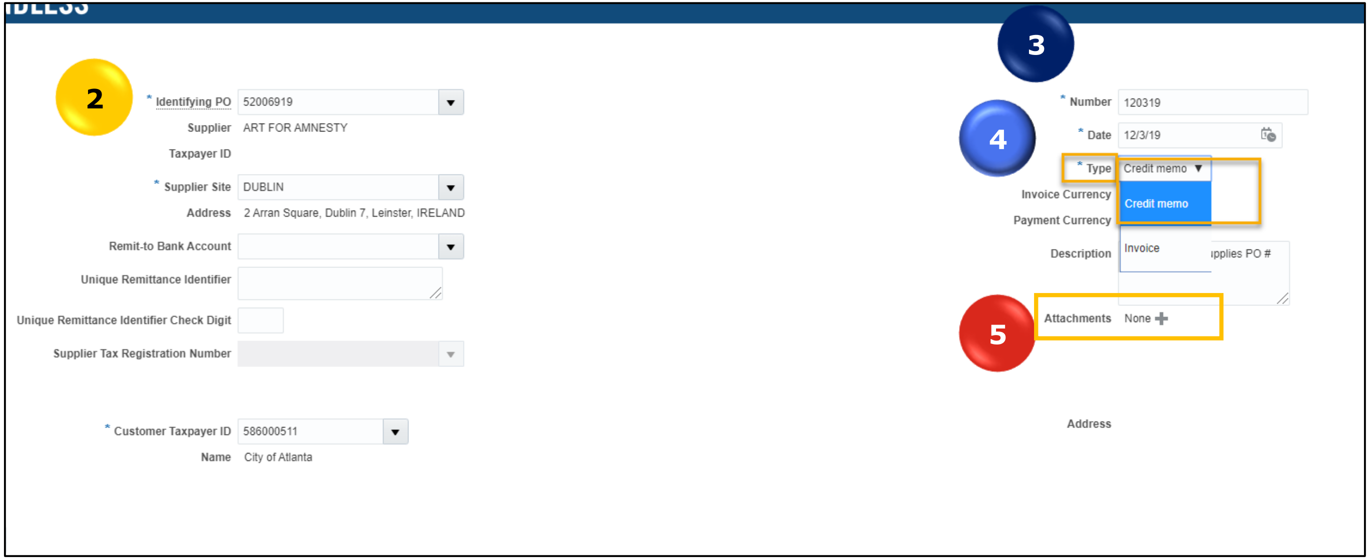
To select **Identifying PO** and **Supplier Site**, click **drop-down**.

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

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

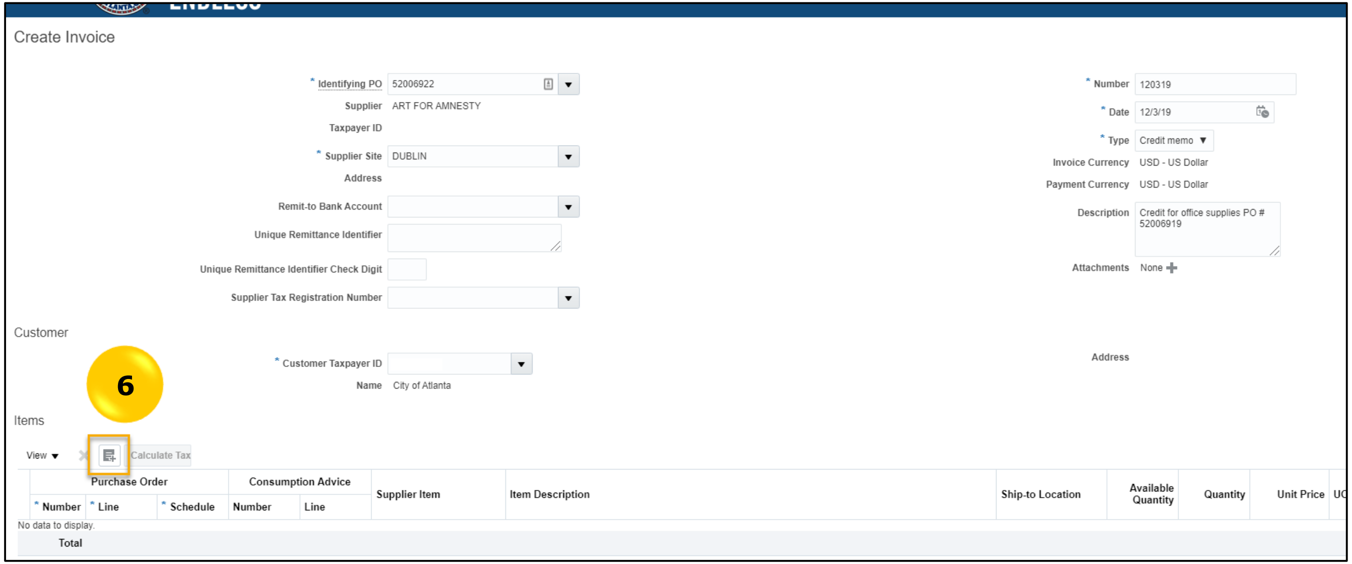
5 **Attachments** are ***required***.

Attach your **invoice** before you submit.



Create Credit Memo – Step 3 of 5

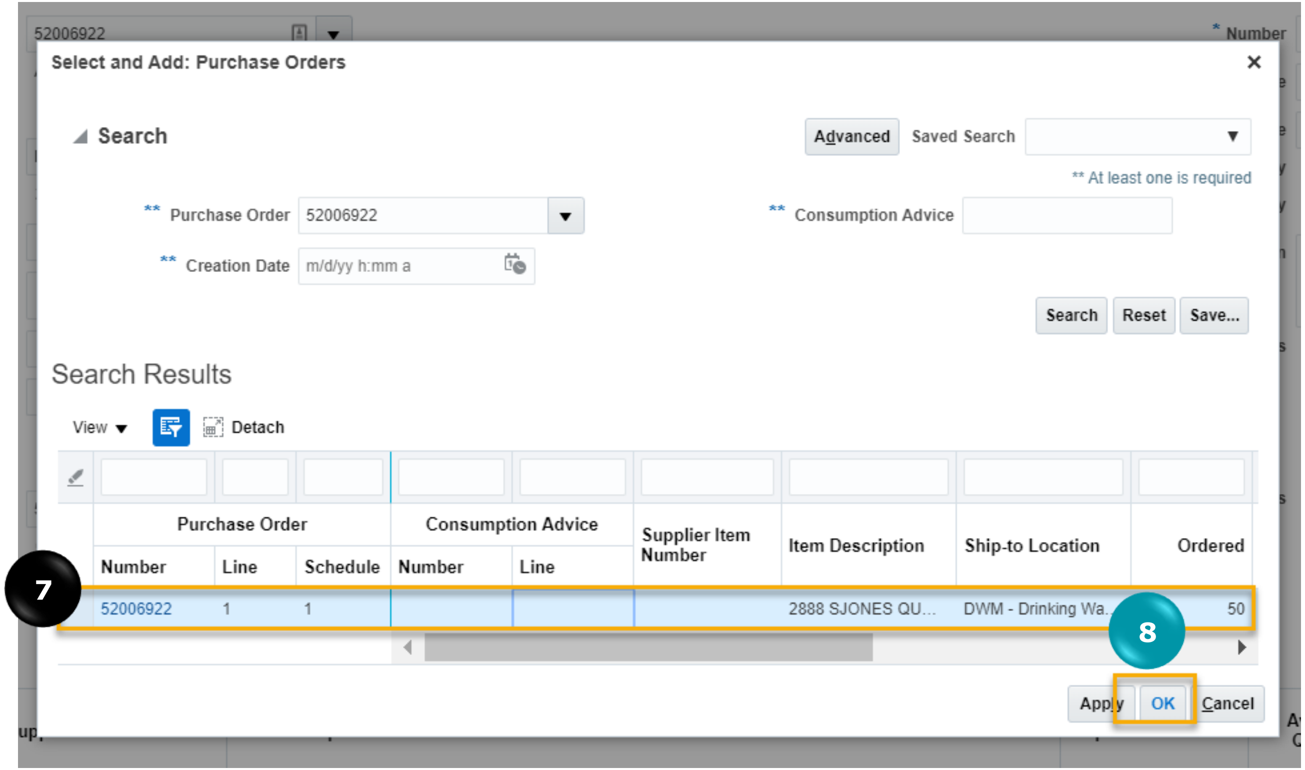
6 Under **Items** section, Click **Select and Add** button



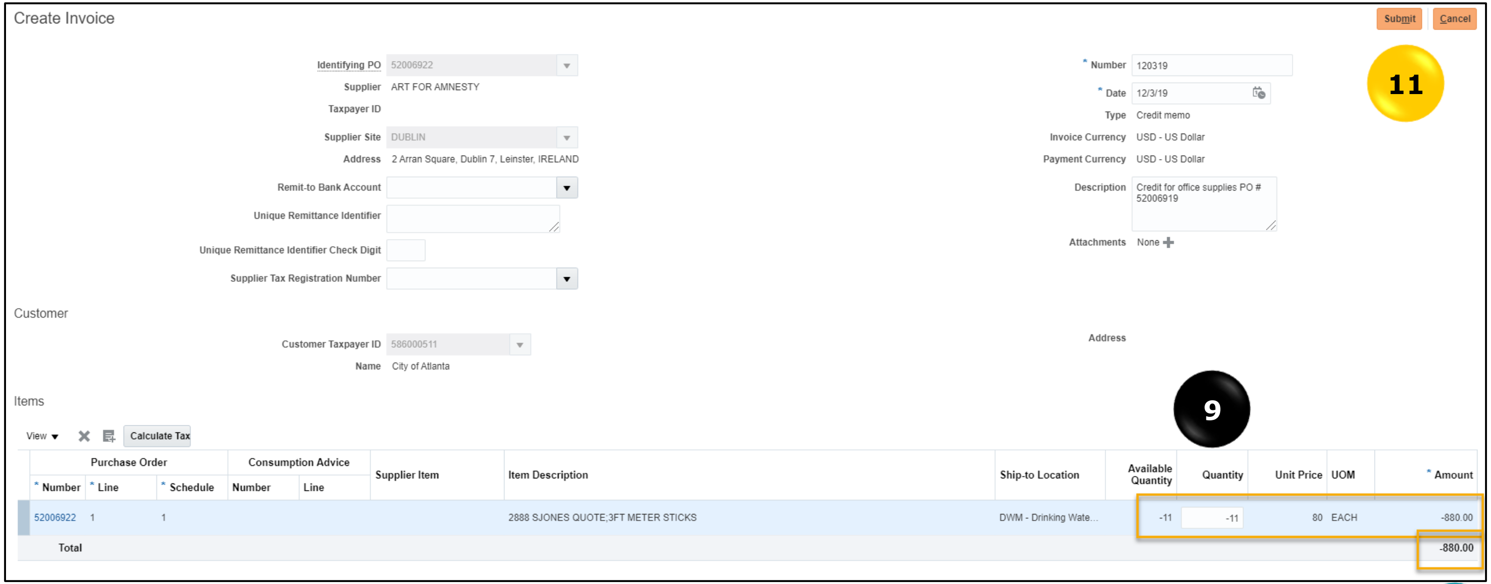
Create Credit Memo – Step 4 of 5

7 Highlight the appropriate row for the **line item**.

8 Click **OK**.



Create Credit Memo – Step 5 of 5



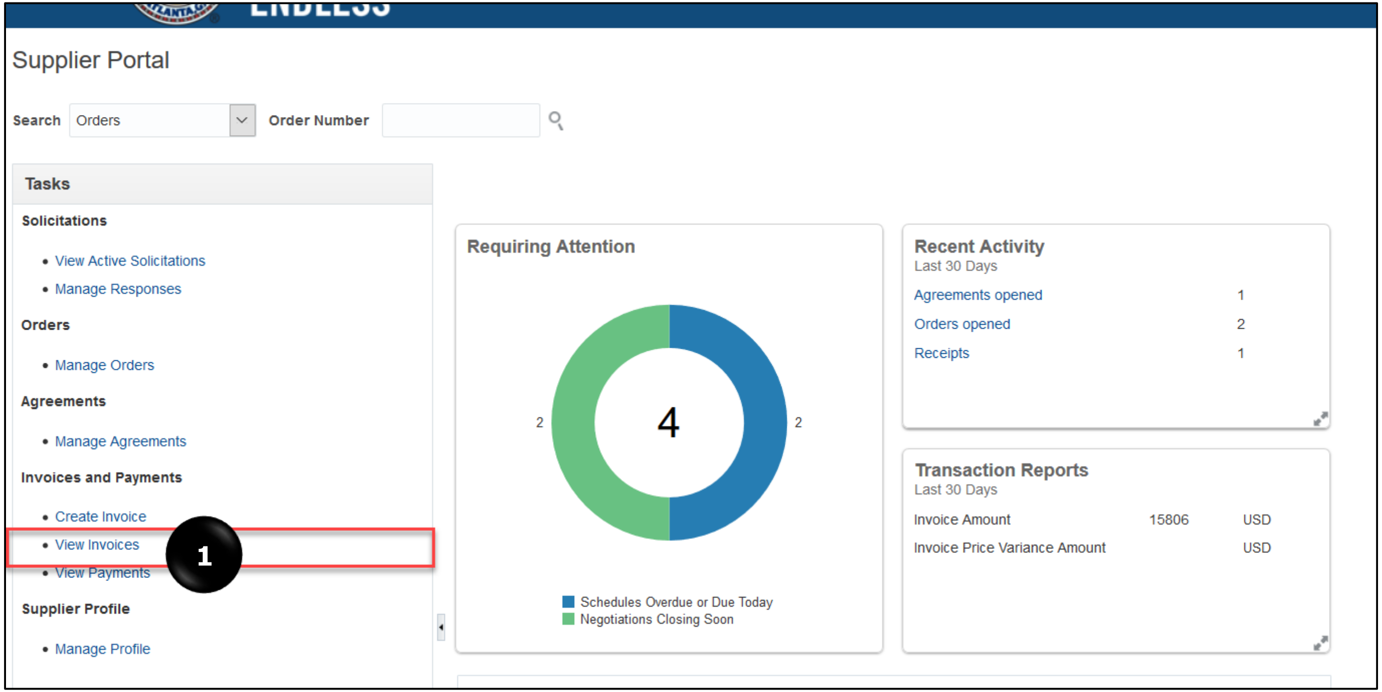
9 You can update the **quantity** as needed

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

11 Click **Submit**

View Invoices – Step 1 of 3

1 Click **View Invoices**.

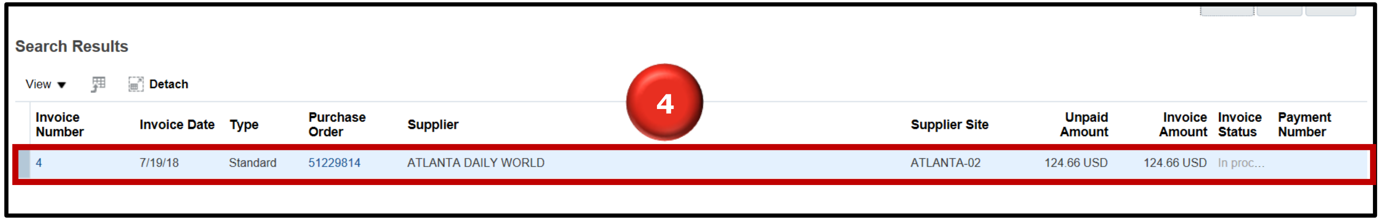


View Invoices – Step 2 of 3

2 Enter the appropriate **field(s)**.

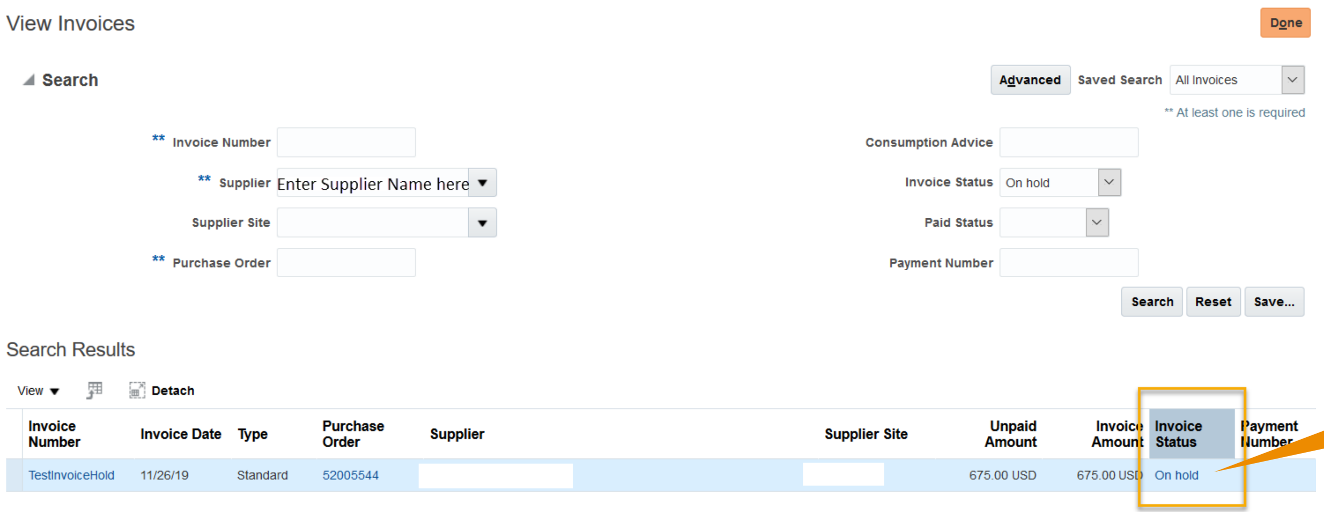
3 Click **Search**.

4 Search Results are displayed. Appropriate Invoice can be **reviewed**.

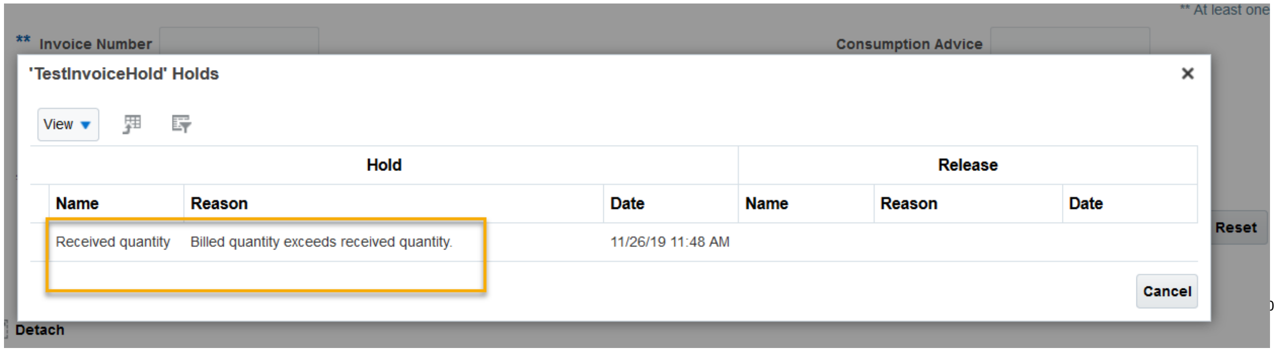


View Invoices – Step 3 of 3

View invoice status



If you click **On Hold**, you can view the **Hold Reason** as seen below



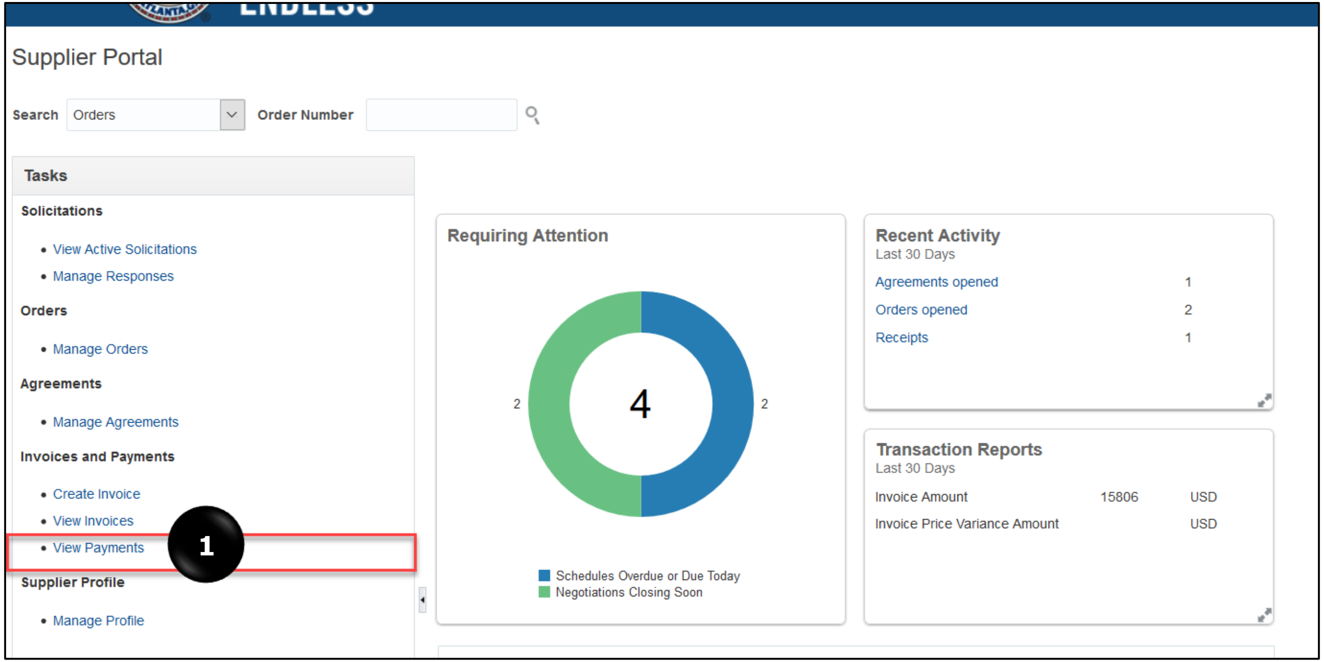
Invoice Holds

Below are some common invoice holds

Hold Name	Hold Descriptions	
Line variance	Total of invoice lines does not equal invoice amount.	
Received quantity	Billed quantity exceeds received quantity.	
Amount received	Amount billed exceeds amount received.	
Ordered quantity	Billed quantity exceeds ordered quantity.	

View Payments – Step 1 of 2

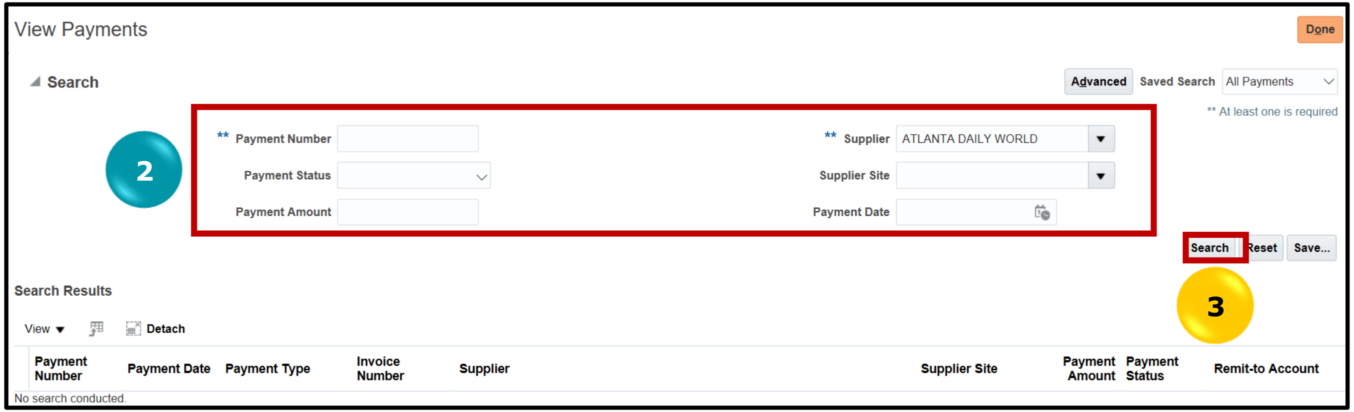
1 Click **View Payments**.



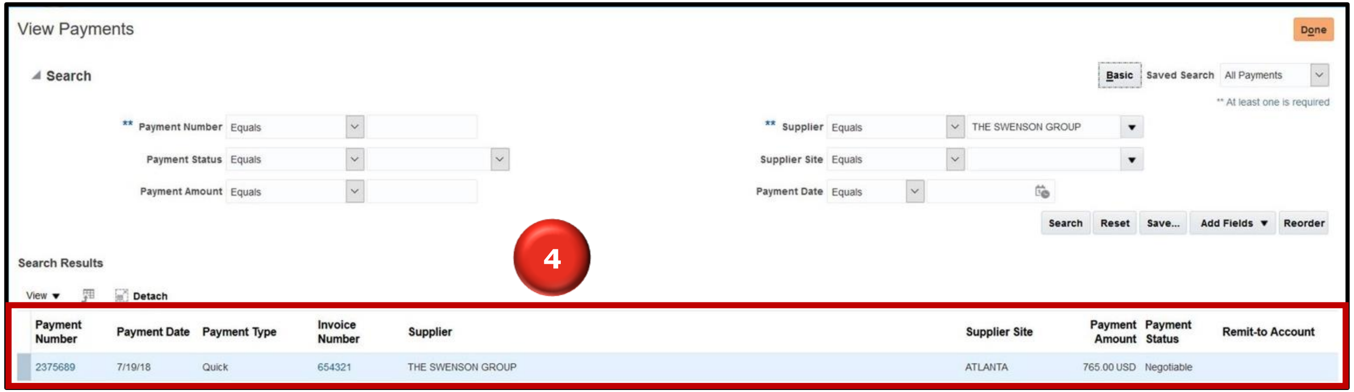
View Payments – Step 2 of 2

2 Enter appropriate **field(s)**.

3 Click **Search**.



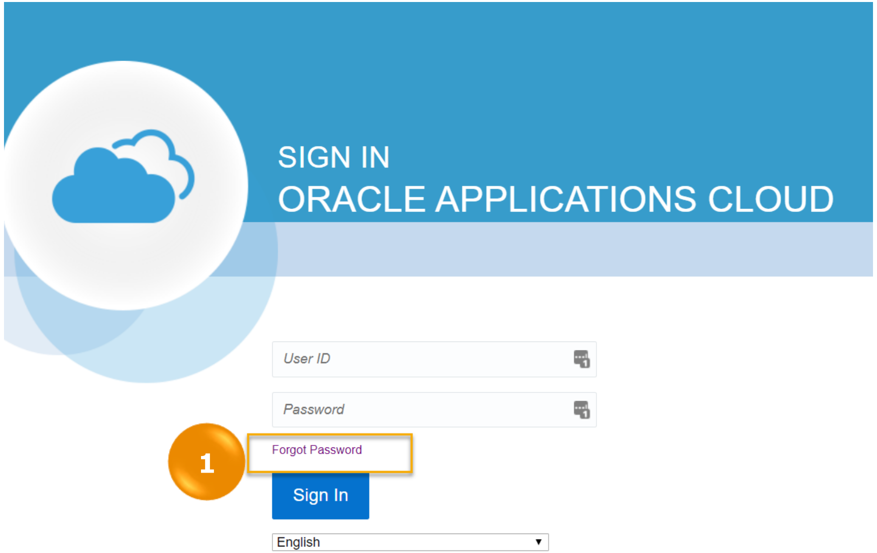
4 Search Results are displayed. Appropriate Payments can be **reviewed**.

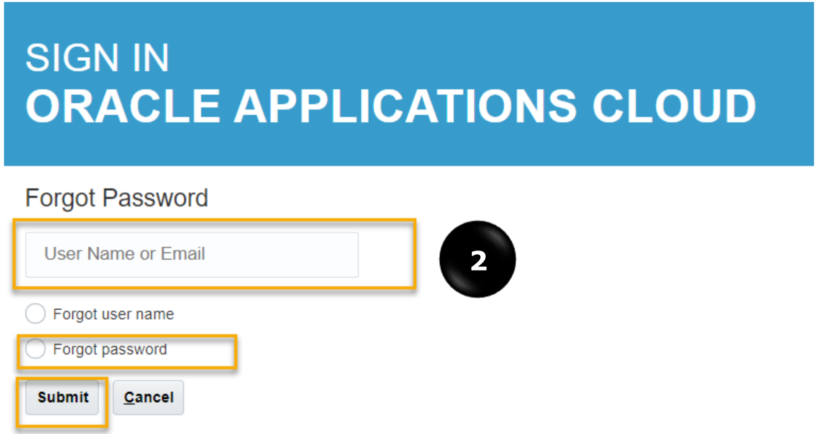


How to Reset Password in Supplier Portal

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?

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

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