



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



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

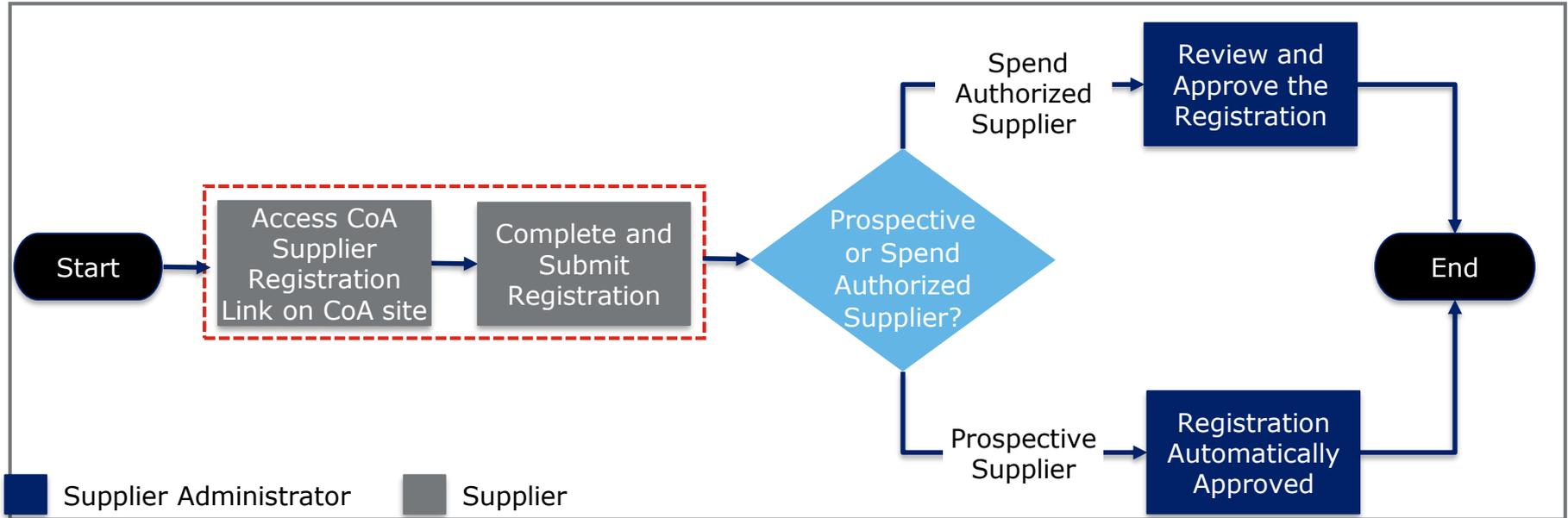


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Supplier Registration Workflow

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.*

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

CITY OF ATLANTA, GA

Search ATL311

GOVERNMENT RESIDENTS VISITORS BUSINESS I WANT TO...

Government » Departments » Procurement »

Supplier Central

Font Size: + - Share & Bookmark Feedback Print

Slide1 To participate in the bid process, you must be registered as a supplier with the City of Atlanta. There are two supplier types you can register as:

To register as a Prospective Supplier, click [here](#)

- Allowed to submit quotes, bids, or proposals, but cannot be awarded bids, receive purchase orders, or create/submit invoices. A W-9 form is not required for this supplier type.
- This registration type is automatically approved once completed.

To register as a Spend Authorized Supplier, click [here](#)

- Allowed to submit quotes, bids, or proposals as well as receive purchase orders and create/submit invoices. A signed and dated W-9 is required for this supplier type. [IRS Form W-9](#)
- This registration type will take 5-10 business days to review.

To login to the Supplier Portal, please click [here](#)

For information on becoming certified with the City of Atlanta, please visit the Office of Contract Compliance website [here](#)

Support for Suppliers

For any questions or concerns please feel free to email Supplierregistration@Atlanta.gov

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.

YOUR POSSIBILITIES ARE ENDLESS

1 Company Details 2 Contacts 3 Addresses 4 Business Classifications 5 Bank Accounts 6 Products and Services 7 Review 4

Register Supplier: Company Details

Back Next Save for Later Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

2 * Company

* Tax Organization Type

Corporate Web Site

Please attach a signed and dated W8/W9 form here None +

D-U-N-S Number

Tax Country

Taxpayer ID

Tax Registration Number

Note to Approver

Your Contact Information

Enter the contact information for communications regarding this registration.

3 * First Name

* Last Name

* Email

* Confirm Email

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**

The screenshot shows the 'Register Supplier: Contacts' tab. At the top, a progress bar has seven steps: 1. Company Details (checked), 2. Contacts (active), 3. Addresses, 4. Business Classifications, 5. Bank Accounts, 6. Products and Services, and 7. Review. A red box highlights the 'Next' button in the top right corner. Below the progress bar, the text 'Enter at least one contact.' is displayed. A toolbar contains buttons for '+ Create', 'Edit', 'Delete', 'Freeze', 'Detach', and 'Wrap'. A table below has columns for Name, Job Title, Email, Administrative Contact, Request User Account, Edit, and Delete. One row is visible with 'Doe, John', 'jdoe@test.com', and checkmarks in the Administrative Contact and Request User Account columns.

6

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

The screenshot shows the 'Register Supplier: Addresses' tab. The progress bar now shows steps 1 through 3 as completed. A red box highlights the '+ Create' button in the toolbar. Below the progress bar, the text 'Enter at least one address for remit-to and ordering address purposes.' is displayed. The toolbar contains buttons for '+ Create', 'Edit', 'Delete', 'Freeze', 'Detach', and 'Wrap'. A table below has columns for Address Name, Address, Phone, Address Purpose, Edit, and Delete. The table is currently empty.

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.

Create Address

* Address Name

* Country

Address Line 1

Address Line 2

City

State

Postal Code

County

* Address Ordering

Purpose Remit to

RFQ or Bidding

Phone 1

Fax 1

Email

Address Contacts

Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact
No data to display			
Columns Hidden 4			

Create Another OK Cancel

Register Supplier: Addresses

Enter at least one address for remit-to and ordering address purposes.

Actions View Format + Create Edit X Delete Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Edit	Delete
test HQ	191 Peachtree Street,ATLANTA, GA 30303Fulton		Ordering		

Columns Hidden 3

Back Next Save for Later Register Cancel

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.

The screenshot shows a multi-step registration process. At the top, a progress bar has six steps: 1 (Company Details), 2 (Contacts), 3 (Addresses), 4 (Business Classifications), 5 (Bank Accounts), and 6 (Products and Services). Step 4 is the current step, highlighted with a blue circle and the number 4. Step 12 is also highlighted with a red circle and the number 12, indicating the current step in the overall process.

The main heading is "Register Supplier: Business Classifications". Below it, there are instructions: "Enter at least one business classification. Select none applicable." and a checkbox "None of the classifications apply".

Below the instructions is a table with columns: Classification, Subclassification, Certifying Agency, Other Certifying Agency, Certificate, Start Date, Expiration Date, Attachments, and Notes. The first row has "SBE" in the Classification column, which is highlighted with a red box and callout 11. There is a "+" button in the Actions row, highlighted with a red box and callout 10.

At the top right of the form, there are five buttons: "Back", "Next", "Save for Later", "Register", and "Cancel". The "Next" button is highlighted with a red box and callout 12.

List of values for Certifying Agencies

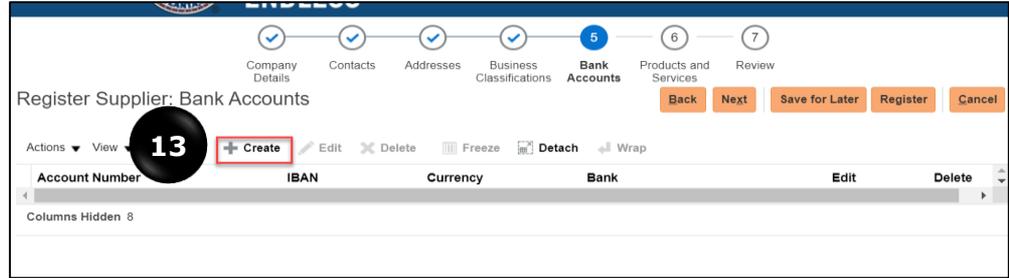


Program	Classification	Sub-Classification	Certifying Agency	Certificate
EBO	MBE	AABE	City of Atlanta	AABE
EBO	MBE	HABE	City of Atlanta	AABE
EBO	MBE	APABE	City of Atlanta	AABE
EBO	MBE	NABE	City of Atlanta	NABE
EBO	FBE		City of Atlanta	FBE
SBO	SBE		City of Atlanta	SBE
SBOSM	SBE		City of Atlanta	SBE
DBE	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.



14 Create Bank Account

* Country: United States

* Account Number: 1111111111111111

Bank Name: BANK OF AMERICA, N.A.

Routing Number: 021200339

Allow international payments

Additional Information

Account Name:

Alternate Account Name:

Account Suffix:

From Date: 4/20/20

Inactive On: m/d/yy

IBAN:

Currency:

Check Digits:

Account Type:

Description:

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** (dof-treasury@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** (dof-treasury@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.

The screenshot shows the 'Register Supplier: Bank Accounts' step in a registration process. A progress bar at the top indicates steps 1 through 7, with step 5 'Bank Accounts' highlighted in blue and step 6 'Products and Services' highlighted in red with a '16' in a red circle. Below the progress bar, there are buttons for 'Back', 'Next', 'Save for Later', 'Register', and 'Cancel'. The 'Next' button is highlighted with a red box. Below the buttons is a table with columns: Account Number, IBAN, Currency, Bank, Edit, and Delete. The first row contains the value 'XXXXXXXXXXXX3456' in the Account Number column. Below the table, it says 'Columns Hidden 8'.

17

Click the **Select and Add** button to open the **Select and Add: Products and Services** pop-up window.

The screenshot shows the 'Register Supplier: Products and Services' step in a registration process. A progress bar at the top indicates steps 1 through 7, with step 6 'Products and Services' highlighted in blue and step 7 'Review' highlighted in red with a '17' in a red circle. Below the progress bar, there are buttons for 'Back', 'Next', 'Save for Later', 'Register', and 'Cancel'. The 'Next' button is highlighted with a red box. Below the buttons is a text input field with the placeholder 'Enter at least one product or services category'. Below the text input field is a table with columns: Category Name, Description, and Remove. The 'Select and Add' button is highlighted with a red box.

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**.

18

Select and Add: Products and Services Categories ✕

Search

Category Name Description

View ▼ Format ▼ Freeze Detach Filter Sort Refresh Wrap

Select	Category Name	Description
<input type="checkbox"/>	005	ABRASIVES
<input type="checkbox"/>	▶ 005.0000 - ABRASIVES	005.0000 - ABRASIVES
<input type="checkbox"/>	▶ 005.1400 - Abrasives, Coated: Cloth, Fiber, Sandpap	005.1400 - Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
<input type="checkbox"/>	▶ 005.1404 - ABRASIVE, PLASTONE	005.1404 - ABRASIVE, PLASTONE
<input type="checkbox"/>	▶ 005.1408 - BELTS, ABRASIVE, ALUMINUM OXIDE	005.1408 - BELTS, ABRASIVE, ALUMINUM OXIDE
<input type="checkbox"/>	▶ 005.1423 - CLOTHS, ABRASIVE, METAL	005.1423 - CLOTHS, ABRASIVE, METAL
<input type="checkbox"/>	▶ 005.1438 - DISCS, SANDING	005.1438 - DISCS, SANDING
<input type="checkbox"/>	▶ 005.1442 - DISCS, RESIN BOND, ADHESIVE BACK	005.1442 - DISCS, RESIN BOND, ADHESIVE BACK
<input type="checkbox"/>	▶ 005.1446 - PAPERS, ABRASIVE, OPEN COAT	005.1446 - PAPERS, ABRASIVE, OPEN COAT
<input type="checkbox"/>	▶ 005.1449 - SANDPAPER, ABRASIVE, ALUMINUM C	005.1449 - SANDPAPER, ABRASIVE, ALUMINUM OXIDE

Columns Hidden 1

19

20

External Registration – Step 9 of 11



21

Click the **Next** button.

The screenshot shows a progress bar at the top with seven steps: Company Details, Contacts, Addresses, Business Classifications, Bank Accounts, Products and Services (highlighted with a '6' in a circle), and Review. A '21' in a black circle is overlaid on the 'Products and Services' step. Below the progress bar, the title is 'Register Supplier: Products and Services'. There are four buttons: 'Back', 'Next' (highlighted with a red box), 'Save for Later', and 'Register'. Below the buttons, there is a text prompt: 'Enter at least one products and services category.' and a toolbar with 'Select and Add', 'Remove', 'Freeze', 'Detach', and 'Wrap'. A table below contains one row with the following data:

Category Name	Description	Remove
005	ABRASIVES	X

22

Review the information

23

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

22

The screenshot shows a progress bar at the top with seven steps: Company Details, Contacts, Addresses, Business Classifications, Bank Accounts, Products and Services, and Review (highlighted with a '7' in a circle). A '23' in a yellow circle is overlaid on the 'Review' step. Below the progress bar, the title is 'Review Supplier Registration: TestSupplier111919'. There are four buttons: 'Back', 'Next', 'Save for Later', and 'Register' (highlighted with a red box). Below the buttons, there is a 'Company Details' section with the following information:

Company	TestSupplier111919	D-U-N-S Number	987654321
Tax Organization Type	Corporation	Tax Country	
Corporate Web Site		Taxpayer ID	
		Tax Registration Number	
		Note to Approver	

Below this is an 'Attachments' section with a toolbar containing 'View', '+', and 'X'. A table below contains the following columns:

Type	* File Name or URL	Title	Description	Attached By	Attached Date
Columns Hidden 1					

External Registration – Step 10 of 11



24

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

----- 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

24

25

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

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.

Thank You,
Oracle Fusion Applications

26

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.

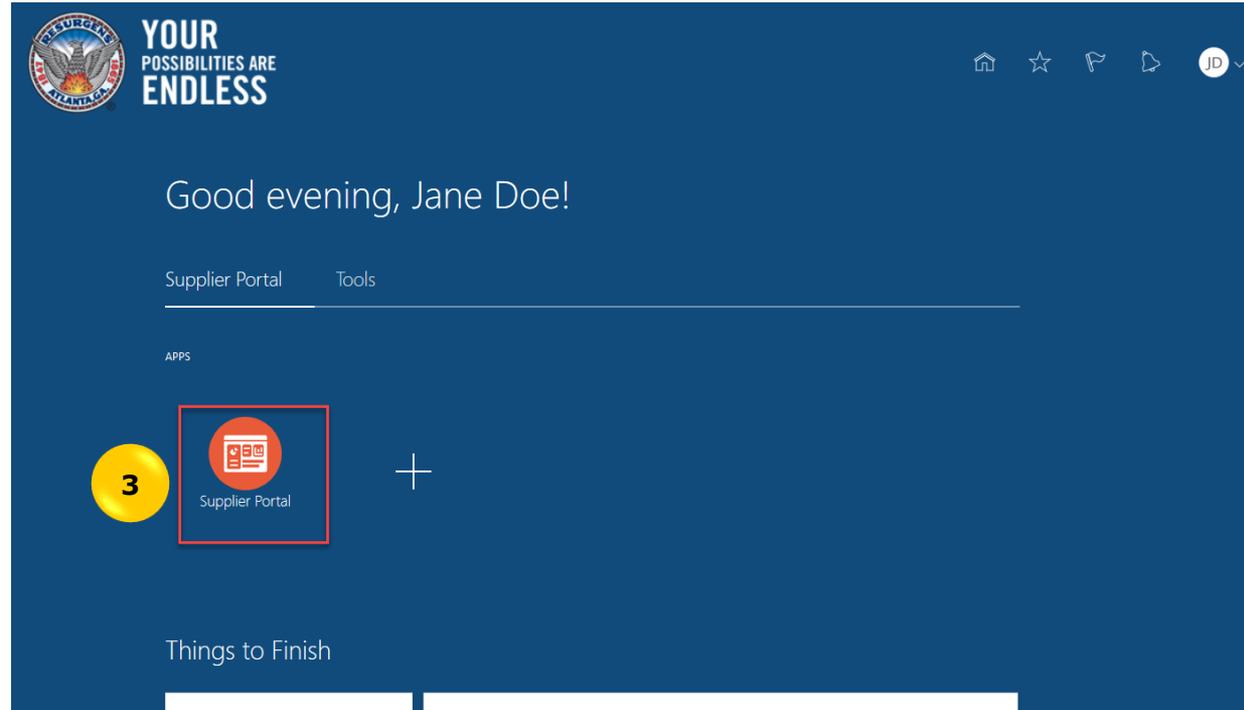
The screenshot shows the Oracle Applications Cloud Sign In page. The page has a blue header with a cloud icon and the text "SIGN IN ORACLE APPLICATIONS CLOUD". Below the header, there are two input fields: "User ID" and "Password". A red box highlights these two fields, with a black circle containing the number "1" next to it. Below the input fields, there is a "Forgot Password" link and a "Sign In" button. A red box highlights the "Sign In" button, with a black circle containing the number "2" next to it. At the bottom, there is a language dropdown menu set to "English".

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.

The screenshot shows the Supplier Portal interface. At the top, there is a search bar with a dropdown menu set to 'Orders' and a search input field labeled 'Order Number'. Below the search bar is a 'Tasks' sidebar with categories: Solicitations (View Active Solicitations, Manage Responses), Orders (Manage Orders), Agreements (Manage Agreements), Invoices and Payments (Create Invoice, View Invoices, View Payments), and Supplier Profile (Manage Profile). The main content area features a 'Requiring Attention' donut chart showing 4 items: 2 Schedules Overdue or Due Today (blue) and 2 Negotiations Closing Soon (green). To the right, there is a 'Recent Activity' table for the last 30 days and a 'Transaction Reports' table for the last 30 days.

Activity	Count
Agreements opened	1
Orders opened	2
Receipts	1

Report Item	Amount	Unit
Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

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.

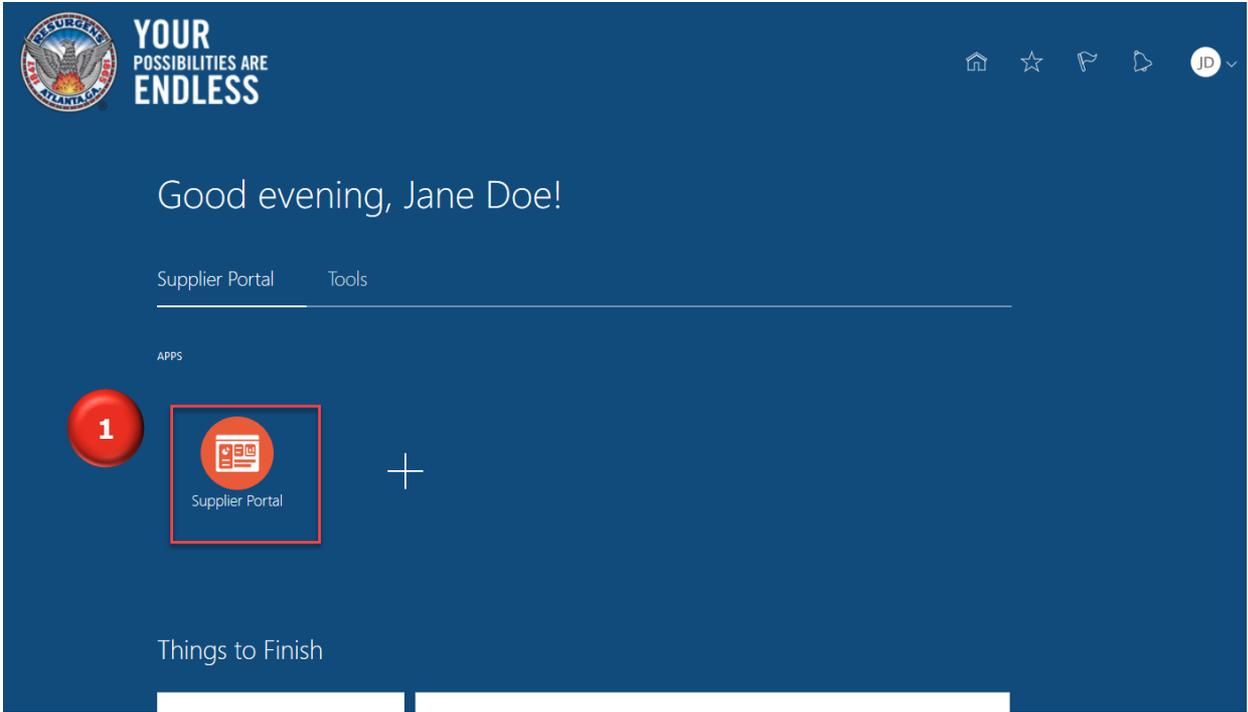
Edit Supplier Profile

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**.

Supplier Portal

Search Orders Order Number

Tasks

Solicitations

- View Active Solicitations
- Manage Responses

Orders

- Manage Orders

Agreements

- Manage Agreements

Invoices and Payments

- Create Invoice
- View Invoices
- View Payments

Supplier Profile

- Manage Profile

Requiring Attention

4

2 2

Schedules Overdue or Due Today
Negotiations Closing Soon

Recent Activity
Last 30 Days

Agreements opened	1
Orders opened	2
Receipts	1

Transaction Reports
Last 30 Days

Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

Supplier News
Welcome to ATLCloud!

Company Profile

Cancel Change Request Edit Done

There are profile changes that are not submitted. You must edit the changes to continue.

Last Change Request 370002 Requested By Doe, Jane Change Description test

Request Status Withdrawn Request Date 11/6/19

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Company

Supplier Number

Supplier Type Supplier

Tax Organization Type Corporation

Status Active

Attachments None

Identification

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 Change Request: 2001

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

* Supplier Name ATLANTA DAILY WORLD

Supplier Number A511500-01

Supplier Type Supplier

Tax Organization Type Corporation

Status Active

Attachments None +

Identification

D-U-N-S Number

Customer Number

SIC

National Insurance Number

Corporate Web Site

Corporate Profile

Year Established

Mission Statement

Chief Executive Title

Chief Executive Name

Edit Profile – Step 4 of 13

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

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

Change Description

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format **+** Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
ATLANTA-00	145 AUBURN AVE, NE, ATLANTA, GA 30303		Ordering; Remit to	6594988	Active
ATLANTA-02	3485 N DESERT DRIVE BLDG 2 SUITE 109, ATLANTA, GA 30344		Ordering; Remit to		Active
DETROIT	1452 RANDOLPH SUITE-400, DETROIT, MI 4826		Remit to		Active

Columns Hidden 3

6 Enter the required **Details**.

Create Address

* Address Name Atlanta-04

* Country United States

Address Line 1

Address Line 2

County

City

State

Postal Code

Language

* Address Purpose Ordering Remit to RFQ or Bidding

Phone 1

Fax 1

Email

Inactive Date

Status Active

6

7

Create Another **OK** Cancel

7 Click **OK**.

Edit Profile – Step 5 of 13



8

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

Change Description

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + ✎ ✕ Status Active Freeze Wrap

Address	Address
Create	145 AUBURN AVE, NE,ATLANTA, GA 30303
Edit	3485 N DESERT DRIVE BLDG 2 SUITE 109,ATLANTA, GA 30344
Delete	DETROIT 1452 RANDOLPH SUITE-400,DETROIT, MI 4826

Columns Hidden 3

Edit Profile – Step 6 of 13



9

Enter the appropriate **fields**.

10

Click **OK**.

Edit Address: ATLANTA-00 9

* Address Name

* Address Purpose Ordering
 Remit to
 RFQ or Bidding

* Country

Address Line 1

Address Line 2

Phone

Fax

County

Email

City

Inactive Date

State

Status Active

Postal Code

Language

10

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 Change Request: 370002 Cancel Change Request Review Changes Save

Change Description test

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Actions View **12** + ✕ Status Active ▾ Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account
Doe, Jane		jane@test.com		✓	✓

Columns Hidden 7

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.)

13

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

▲ Contact Addresses

Actions View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				
Columns Hidden 5				

▲ User Account

14 Request user account

Roles Data Access

Actions View Format Freeze Detach Wrap

Role	Description
COA POS Supplier Self Service User JR	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...

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

Default	Payment Method	From Date	Example: 11/29/14
✓	Electronic	10/2/08	
	COA Retainage	1/1/51	
	Check	7/4/18	
	Credit Card	1/1/51	
	Outsourced Check	10/2/08	
	Wire	10/2/08	

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

Organization Details Tax Identifiers Addresses

Payment Methods Bank Accounts

Actions View Format + X

Payment Method

- Add Row
- Remove
- Set Default**

Giro Inpayment Form, Typ

Credit Card

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 Change Request: 564005

Change Description

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods **Bank Accounts**

18

Actions View Format + Freeze Wrap

Primary	Account Number	IBAN	Currency	Bank Name
No data to display.				
Columns Hidden: 8				

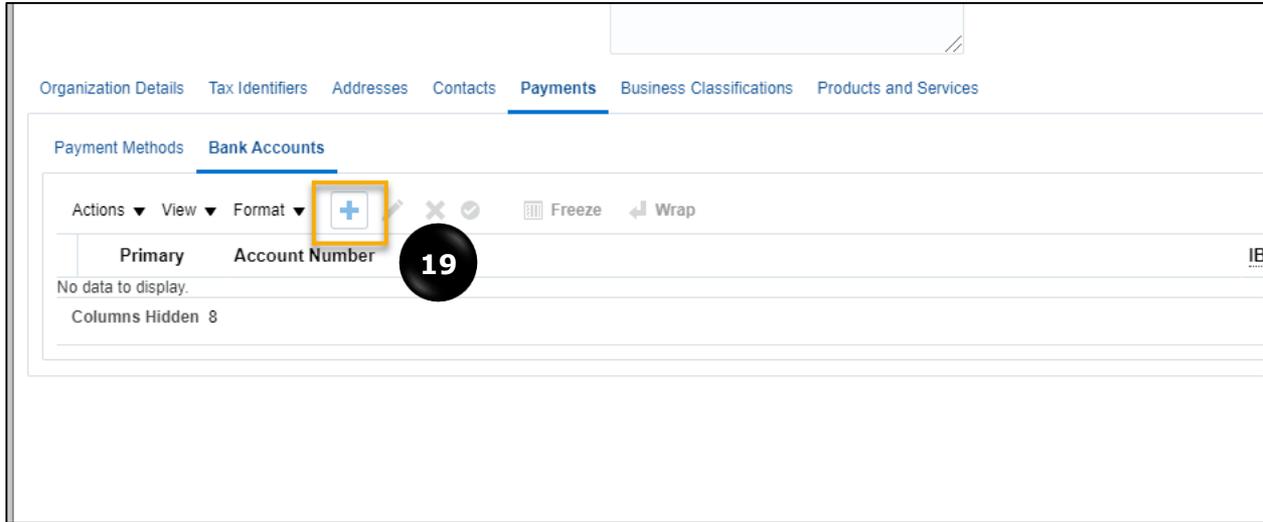
Delete Change Request Review and Submit Changes Save Save and Close Cancel

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

(dof-treasury@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

(dof-treasury@atlantaga.gov)

Routing Number is mandatory!

20

Create Bank Account

* Country United States

* Account Number 111111111111

Bank Name BANK OF AMERICA, N.A.

Routing Number 021200339

Allow international payments

Additional Information

Account Name

Alternate Account Name

Account Suffix

From Date 4/20/20

Inactive On m/d/yy

IBAN

Currency

Check Digits

Account Type

Description

Create Another OK Cancel

Edit Profile – Step 13 of 13



21

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

Edit Profile Change Request: 564004

Buttons: Delete Change Request, **Review and Submit Changes**, Save, Save and Close, Cancel

Change Description: [Text Area]

Navigation: Organization Details, Tax Identifiers, Addresses, Contacts, **Payments**, Business Classifications, Products and Services

Sub-sections: **Payment Methods**, Bank Accounts

Actions: View, Format, +, X, Freeze, Detach, Wrap

Default	Payment Method	From Date	To Date
<input checked="" type="checkbox"/>	Check	12/28/18	m/d/yy
<input type="checkbox"/>	COA Retainage	1/1/51	m/d/yy
<input type="checkbox"/>	Credit Card	1/1/51	m/d/yy
<input type="checkbox"/>	Electronic	10/2/08	m/d/yy
<input type="checkbox"/>	Outsourced Check	10/2/08	m/d/yy
<input type="checkbox"/>	Wire	10/2/08	m/d/yy

Submit



12

Click **Submit**. Changes submitted for approval.

Review Changes

Change Description

Buttons: Edit, **Submit**, Cancel

12

Addresses

View Format Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
● ATLANTA-00	144 AUBURN AVE, NE, ATLANTA, GA 30303		Ordering; Remit to	6594988	Active	

Columns Hidden 3

Payment Methods

View Format Freeze Detach Wrap

Default	Payment Method	From Date	To Date	Details
● <input checked="" type="checkbox"/>	Outsourced Check	10/2/08		
● <input type="checkbox"/>	Check	7/4/18		

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
Lesson 2 : Supplier Portal Overview	15 mins
Lesson 3 : Supplier Portal Key Functionalities	40 mins
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**.

The screenshot shows the 'Supplier Portal' interface. On the left sidebar, the 'Orders' section is expanded, and the 'Manage Orders' link is highlighted with a red box and a red circle containing the number '1'. The main content area features a search bar, a 'Requiring Attention' donut chart, and two summary boxes: 'Recent Activity' and 'Transaction Reports'.

Requiring Attention Chart Data:

Category	Count
Schedules Overdue or Due Today	2
Negotiations Closing Soon	2
Total	4

Recent Activity (Last 30 Days):

Agreements opened	1
Orders opened	2
Receipts	1

Transaction Reports (Last 30 Days):

Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

Manage Orders – Step 2 of 3

Manage Orders screen is displayed.

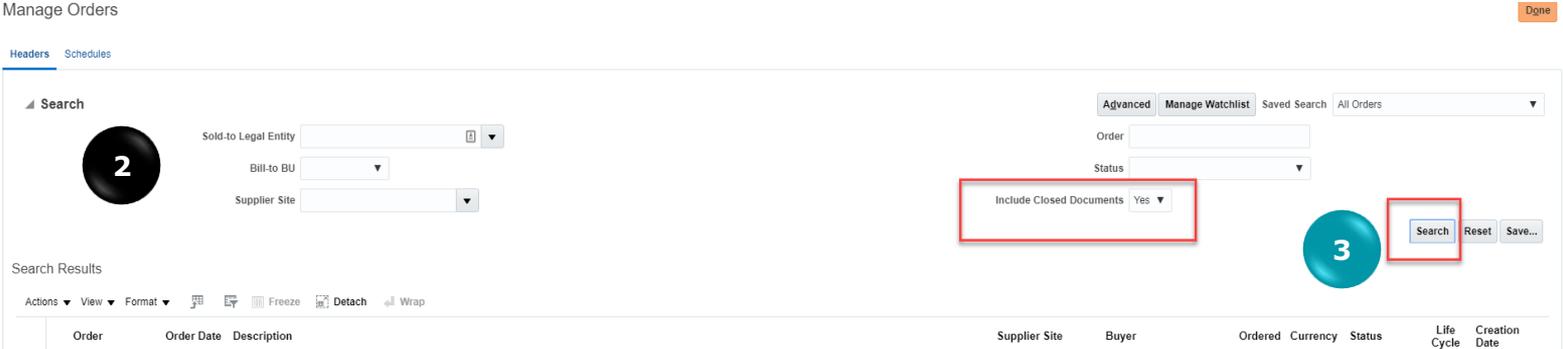
2

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

Done

Headers Schedules

Search

Sold-to Legal Entity

Bill-to BU

Supplier Site

Advanced Manage Watchlist Saved Search All Orders

Order

Status

Include Closed Documents Yes

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
-------	------------	-------------	---------------	-------	---------	----------	--------	------------	---------------

Manage Orders – Step 3 of 3



4

Search results are displayed.
Appropriate Order can be reviewed.

Manage Orders Done

Headers Schedules

Search Advanced Manage Watchlist Saved Search All Orders

Search Results

Actions View Format Freeze Detach Wrap

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
51229814	7/12/18	Operations - Bid#9122-PL	ATLANTA-02	Newton, Shannon	124.66	USD	Open		7/12/18

Columns Hidden 25

Manage Agreements – Step 1 of 2



1

Click **Manage Agreements**.

The screenshot shows the 'Supplier Portal' interface. On the left sidebar, the 'Manage Agreements' option is highlighted with a red box and a red circle containing the number '1'. The main content area features a 'Requiring Attention' donut chart with a total of 4 items: 2 'Schedules Overdue or Due Today' (blue) and 2 'Negotiations Closing Soon' (green). To the right, there are two summary boxes: 'Recent Activity' and 'Transaction Reports'.

Supplier Portal

Search Order Number

Tasks

- Solicitations**
 - View Active Solicitations
 - Manage Responses
- Orders**
 - Manage Orders
- Agreements**
 - Manage Agreements**
- Invoices and Payments**
 - Create Invoice
 - View Invoices
 - View Payments
- Supplier Profile**
 - Manage Profile

Requiring Attention

4

2

2

■ Schedules Overdue or Due Today
■ Negotiations Closing Soon

Recent Activity
Last 30 Days

Agreements opened	1
Orders opened	2
Receipts	1

Transaction Reports
Last 30 Days

Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

Manage Agreements – Step 2 of 2



2

Enter the appropriate field(s).

Manage Agreements

Done

Headers Lines

Search

Advanced Manage Watchlist Saved Search All Agreements

Procurement BU

Supplier Site

Agreement

Status Open

Include Closed and Expired Documents No

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Agreement	Description	Supplier Site	Buyer	Agreement Amount	Released Amount	Currency	Status	End Date	Change Order	Creation Date
No search conducted.										
Columns Hidden	30									

3

Click **Search**.

4

Search Results are displayed. Appropriate Agreement can be reviewed.

Manage Agreements

Done

Headers Lines

Search

Advanced Manage Watchlist Saved Search All Agreements

Search Results

Actions View Format Freeze Detach Wrap

Agreement	Description	Supplier Site	Buyer	Agreement Amount	Released Amount	Currency	Status	End Date	Change Order	Creation Date
71900008		NEENAH	Muse-Simm...		0.00	USD	Open			7/18/18

Columns Hidden 30

Create Invoice – Step 1 of 5



1 Click **Create Invoice**.

The screenshot shows the 'Supplier Portal' interface. On the left, there is a navigation menu with sections: 'Tasks', 'Solicitations', 'Orders', 'Agreements', 'Invoices and Payments', and 'Supplier Profile'. The 'Invoices and Payments' section is expanded, and the 'Create Invoice' option is highlighted with a red box and a black circle containing the number '1'. The main content area features a 'Requiring Attention' donut chart with a total of 4 items: 2 'Schedules Overdue or Due Today' (blue) and 2 'Negotiations Closing Soon' (green). To the right, there are two summary cards: 'Recent Activity' and 'Transaction Reports'.

Supplier Portal

Search Order Number

Tasks

- Solicitations**
 - View Active Solicitations
 - Manage Responses
- Orders**
 - Manage Orders
- Agreements**
 - Manage Agreements
- Invoices and Payments**
 - Create Invoice**
 - View Invoices
 - View Payments
- Supplier Profile**
 - Manage Profile

Requiring Attention

4

2 2

- Schedules Overdue or Due Today
- Negotiations Closing Soon

Recent Activity
Last 30 Days

Agreements opened	1
Orders opened	2
Receipts	1

Transaction Reports
Last 30 Days

Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

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**.

2

3

Create Invoice Submit Cancel

* Identifying PO ▼

Supplier ATLANTA DAILY WORLD

Taxpayer ID 58-1755487

* Supplier Site ▼

Address

Remit-to Bank Account ▼

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Supplier Tax Registration Number ▼

* Number

* Date 📅

* Type Invoice ▼

Invoice Currency

Payment Currency

Description

Attachments None +

Address

Customer

Customer Taxpayer ID ▼

Name

Items

View

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Available Quantity	Quantity	Unit Price	UOM	* Ar
* Number	* Line	* Schedule	Number	Line								
No data to display												

Create Invoice – Step 3 of 5



4

To add a line item, Click
“+” (Select and Add)

Supplier Tax Registration Number

Attachments None +

Customer

* Customer Taxpayer ID 586000511

Name City of Atlanta

Address

Items

View

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Available Quantity	Quantity	Unit Price	UOM	* Ar
* Number	* Line	* Schedule	Number	Line								
No data to display.												
Total												

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**.

Select and Add: Purchase Orders

Search Advanced Saved Search

** At least one is required

** Purchase Order

** Consumption Advice

** Creation Date

Search Reset Save...

Search Results

View

Purchase Order			Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Line	Schedule	Number	Line				
52006922	1	1				2888 SJONES QU...	DWM - Drinking Wa...	50
52006922	2	1				1AKX9 Combinatio...	128	12
52006922	3	1				1ALC0 Combination...	128	12

Apply **OK** Cancel

Create Invoice – Step 5 of 5



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

Create Invoice

Identifying PO 51229814

Supplier ATLANTA DAILY WORLD

Taxpayer ID 58-1755487

Supplier Site ATLANTA-02

Address 3485 N DESERT DRIVE BLDG 2 SUITE 109, ATLANTA, GA 30344

Remit-to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Supplier Tax Registration Number

Customer

Customer Taxpayer ID 586000511

Name City of Atlanta

* Number 4

* Date 7/19/18

Type Invoice

Invoice Currency USD - US Dollar

Payment Currency USD - US Dollar

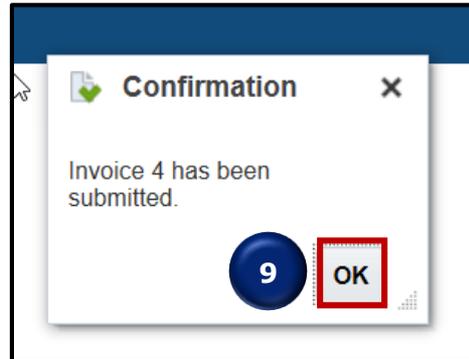
Description

Attachments None +

Address

Submit Cancel

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



9 Click **Submit**.

Create Credit Memo – Step 1 of 5



1 Click **Create Invoice**.

The screenshot displays the 'Supplier Portal' interface. On the left, a navigation menu lists several categories: 'Solicitations', 'Orders', 'Agreements', 'Invoices and Payments', and 'Supplier Profile'. The 'Invoices and Payments' section is expanded, and the 'Create Invoice' option is highlighted with a red border and a black circle containing the number '1'. The main content area features a 'Requiring Attention' donut chart with a total of 4 items, split into 2 blue items (Schedules Overdue or Due Today) and 2 green items (Negotiations Closing Soon). To the right, there are two summary boxes: 'Recent Activity' and 'Transaction Reports'.

Activity	Count
Agreements opened	1
Orders opened	2
Receipts	1

Report Item	Amount	Currency
Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

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.

The screenshot shows the IDLES3 system interface for creating a Credit Memo. The form includes the following fields and callouts:

- 2** (Yellow circle): Identifying PO (52006919), Supplier (ART FOR AMNESTY), Taxpayer ID, Supplier Site (DUBLIN), Address (2 Arran Square, Dublin 7, Leinster, IRELAND), Remit-to Bank Account, Unique Remittance Identifier, Unique Remittance Identifier Check Digit, Supplier Tax Registration Number.
- 3** (Blue circle): Number (120319), Date (12/3/19).
- 4** (Blue circle): Type (Credit memo), Invoice Currency (Credit memo), Payment Currency (Credit memo), Description (Invoice, applies PO #).
- 5** (Red circle): Attachments (None +).

Additional fields visible at the bottom include Customer Taxpayer ID (586000511) and Name (City of Atlanta).

Create Credit Memo – Step 3 of 5



6

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

Create Invoice

* Identifying PO 52006922
Supplier ART FOR AMNESTY
Taxpayer ID
* Supplier Site DUBLIN
Address
Remit-to Bank Account
Unique Remittance Identifier
Unique Remittance Identifier Check Digit
Supplier Tax Registration Number

* Number 120319
* Date 12/3/19
* Type Credit memo
Invoice Currency USD - US Dollar
Payment Currency USD - US Dollar
Description Credit for office supplies PO # 52006919
Attachments None

Customer
* Customer Taxpayer ID
Name City of Atlanta

Items
View  Calculate Tax

Purchase Order		Consumption Advice		Supplier Item	Item Description	Ship-to Location	Available Quantity	Quantity	Unit Price	UC
* Number	* Line	* Schedule	Number	Line						
No data to display.										
Total										

6

Create Credit Memo – Step 4 of 5



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

8 Click **OK**.

52006922

Select and Add: Purchase Orders

Advanced Saved Search

** Purchase Order 52006922

** Consumption Advice

** Creation Date m/d/yy h:mm a

Search Results

Purchase Order			Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Line	Schedule	Number	Line				
52006922	1	1				2888 SJONES QU...	DWM - Drinking Wa.	50

Apply OK Cancel

Create Credit Memo – Step 5 of 5



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

Create Invoice

Identifying PO 52006922
Supplier ART FOR AMNESTY
Taxpayer ID
Supplier Site DUBLIN
Address 2 Arran Square, Dublin 7, Leinster, IRELAND
Remit-to Bank Account
Unique Remittance Identifier
Unique Remittance Identifier Check Digit
Supplier Tax Registration Number

Number 120319
Date 12/3/19
Type Credit memo
Invoice Currency USD - US Dollar
Payment Currency USD - US Dollar
Description Credit for office supplies PO # 52006919
Attachments None

Customer
Customer Taxpayer ID 586000511
Name City of Atlanta

Items

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Available Quantity	Quantity	Unit Price	UOM	Amount
Number	Line	Schedule	Number	Line								
52006922	1	1				2888 SJOES QUOTE:3FT METER STICKS	DWM - Drinking Wate...	-11	-11	80	EACH	-880.00
Total												-880.00

11

9

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

10

11 Click **Submit**

View Invoices – Step 1 of 3



1

Click **View Invoices**.

The screenshot shows the 'Supplier Portal' interface. On the left is a navigation menu with sections: Solicitations, Orders, Agreements, Invoices and Payments, and Supplier Profile. The 'View Invoices' option under 'Invoices and Payments' is highlighted with a red box and a '1' in a black circle. The main content area includes a search bar, a 'Requiring Attention' donut chart, and two summary tables.

Supplier Portal

Search Order Number

Tasks

- Solicitations**
 - View Active Solicitations
 - Manage Responses
- Orders**
 - Manage Orders
- Agreements**
 - Manage Agreements
- Invoices and Payments**
 - Create Invoice
 - View Invoices**
 - View Payments
- Supplier Profile**
 - Manage Profile

Requiring Attention

4

2 2

■ Schedules Overdue or Due Today
■ Negotiations Closing Soon

Recent Activity
Last 30 Days

Agreements opened	1
Orders opened	2
Receipts	1

Transaction Reports
Last 30 Days

Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

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 Done

Search Advanced Saved Search All Invoices ▼ ** At least one is required

2

** Invoice Number Consumption Advice

** Supplier ATLANTA DAILY WORLD Invoice Status

Supplier Site Paid Status

** Purchase Order Payment Number

3 Search Reset Save...

Search Results

View Detach

Search Results

View Detach

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number
4	7/19/18	Standard	51229814	ATLANTA DAILY WORLD	ATLANTA-02	124.66 USD	124.66 USD	In proc...	

4

View Invoices – Step 3 of 3



View invoice status

View Invoices

Done

Search

Advanced Saved Search All Invoices

** At least one is required

** Invoice Number

** Supplier Enter Supplier Name here

Supplier Site

** Purchase Order

Consumption Advice

Invoice Status On hold

Paid Status

Payment Number

Search Reset Save...

Search Results

View Detach

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number
TestInvoiceHold	11/26/19	Standard	52005544			675.00 USD	675.00 USD	On hold	

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

** Invoice Number Consumption Advice

'TestInvoiceHold' Holds

View

Hold			Release		
Name	Reason	Date	Name	Reason	Date
Received quantity	Billed quantity exceeds received quantity.	11/26/19 11:48 AM			

Cancel

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**.

The screenshot shows the 'Supplier Portal' interface. On the left, there is a navigation menu with sections: Tasks, Solicitations, Orders, Agreements, Invoices and Payments, and Supplier Profile. The 'View Payments' link under 'Invoices and Payments' is highlighted with a red box and a '1' in a black circle. The main content area features a 'Requiring Attention' donut chart with a total of 4 items: 2 'Schedules Overdue or Due Today' (blue) and 2 'Negotiations Closing Soon' (green). To the right, there are two summary boxes: 'Recent Activity' and 'Transaction Reports'.

Activity	Count
Agreements opened	1
Orders opened	2
Receipts	1

Report	Amount	Unit
Invoice Amount	15806	USD
Invoice Price Variance Amount		USD

View Payments – Step 2 of 2



2 Enter appropriate field(s).

3 Click **Search**.

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

View Payments Done

Search Advanced Saved Search All Payments ▼ ** At least one is required

2 ****** Payment Number ****** Supplier ATLANTA DAILY WORLD ▼

Payment Status ▼ Supplier Site ▼

Payment Amount Payment Date 📅

3 Search Reset Save...

Search Results

View ▼ 📄 🔗 Detach

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
No search conducted.								

View Payments Done

Search Basic Saved Search All Payments ▼ ** At least one is required

****** Payment Number Equals ▼ ****** Supplier Equals THE SWENSON GROUP ▼

Payment Status Equals ▼ ▼ Supplier Site Equals ▼

Payment Amount Equals ▼ Payment Date Equals ▼ 📅

Search Reset Save... Add Fields ▼ Reorder

Search Results

View ▼ 📄 🔗 Detach

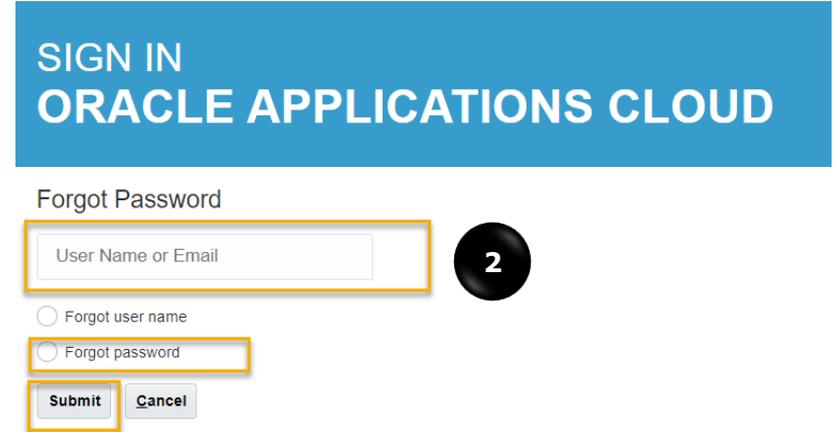
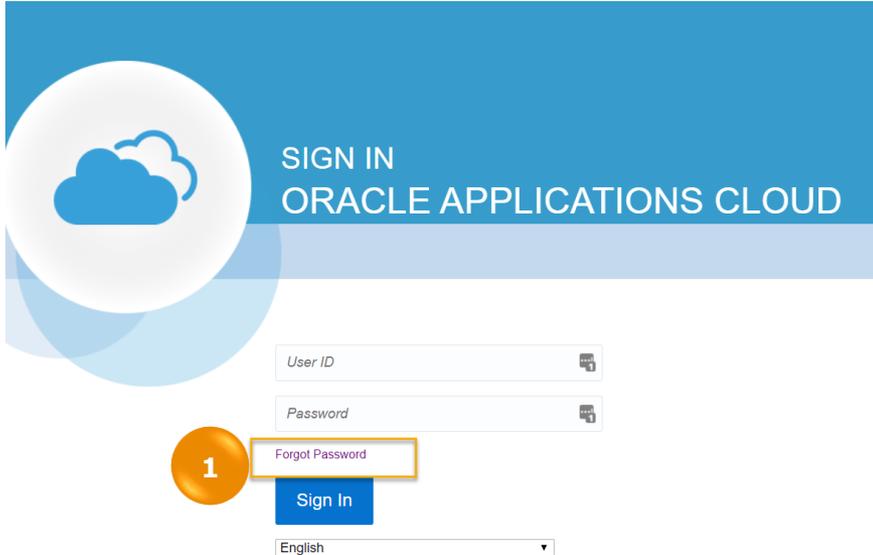
Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
2375689	7/19/18	Quick	654321	THE SWENSON GROUP	ATLANTA	765.00 USD	Negotiable	

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