DO.070 User Guide

Awqaf Investment Company

Oracle Cloud Supplier Portal

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Preface

This document contains an overview of how various tasks are to be performed in the Oracle Fusion Supplier Portal. This training guide provides you with step-by-step instructions on how the supplier register himself, updates his profile, and submits a response.

This document has been organized as per the structure given in the Table of contents, providing information relevant to Awqaf Investment Company Operations.

Topics discussed are:

- Get Started With Oracle Cloud
- Supplier Registrations
- Manage Order
- Supplier Acknowledgment
- Respond to Negotiation
- Respond to Questionnaire
- Using Online Message
- Supplier Profile Self Management

Audience

This manual is written for Awqaf Investment Company Supplier User using Oracle Supplier Portal.

Introduction

This document is intended as a guide for the supplier users to the main operation flows using the Oracle supplier portal model at Awqaf Investment Company.

Screenshots illustrate the main features of the Oracle Fusion Supplier Portal and step-by-step instructions describe in detail the processes involved with Oracle Fusion Application.

This user guide is meant as a supplement to Oracle standard user guides and an online help system available in Oracle Supplier Portal.

Terminology

To understand this user guide, it is important to understand the different terms used in this document.

Term	Meaning
AIC	Awqaf Investment Company
BU	Business Unit
ACC	Account
DFF	Descriptive Flex Fields
PR	Purchase Requisition
PO	Purchase Order
BPA	Blanket Purchase Agreement
UOM	Unit Of Measure
DoA	Delegation of Authority
Fund	Budgetary

Get Started with Oracle

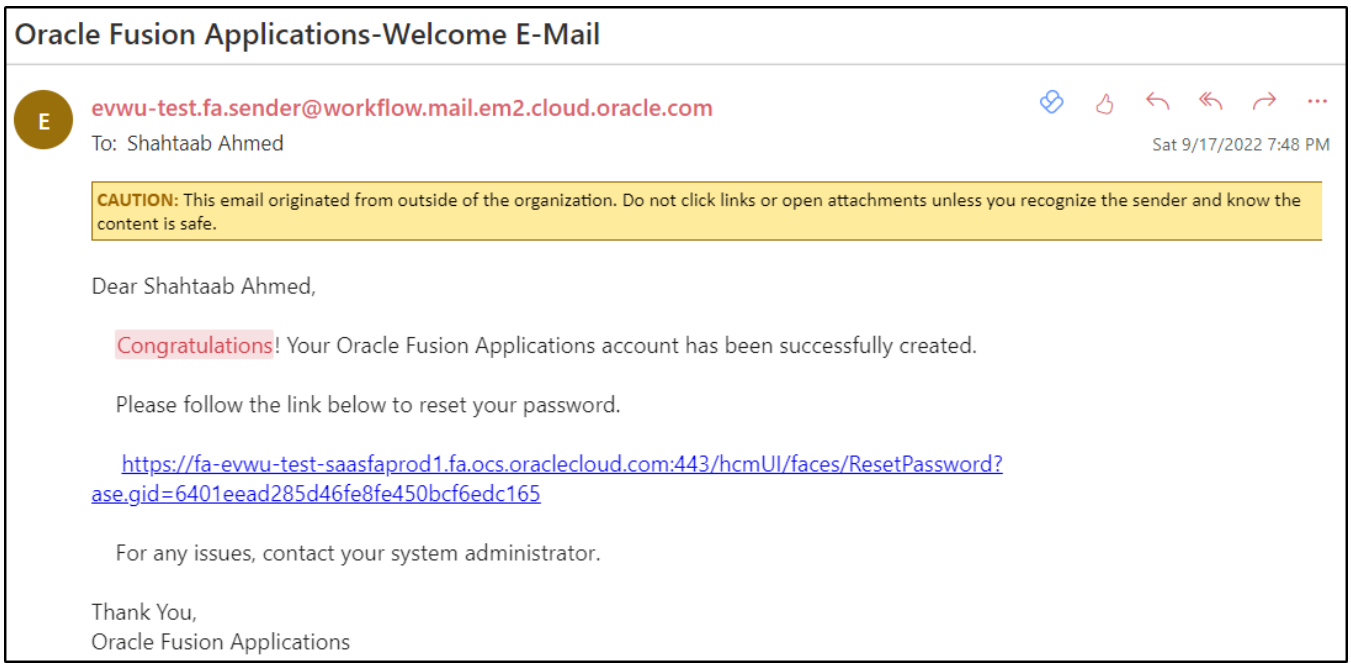
To perform tasks in Oracle Fusion Application, you must first sign in. Below are step-by-step instructions for signing into Awqaf Investment Company Cloud Application.

After you sign in to your Oracle Cloud Account, my Oracle Services page is displayed as a default when you open My Home.

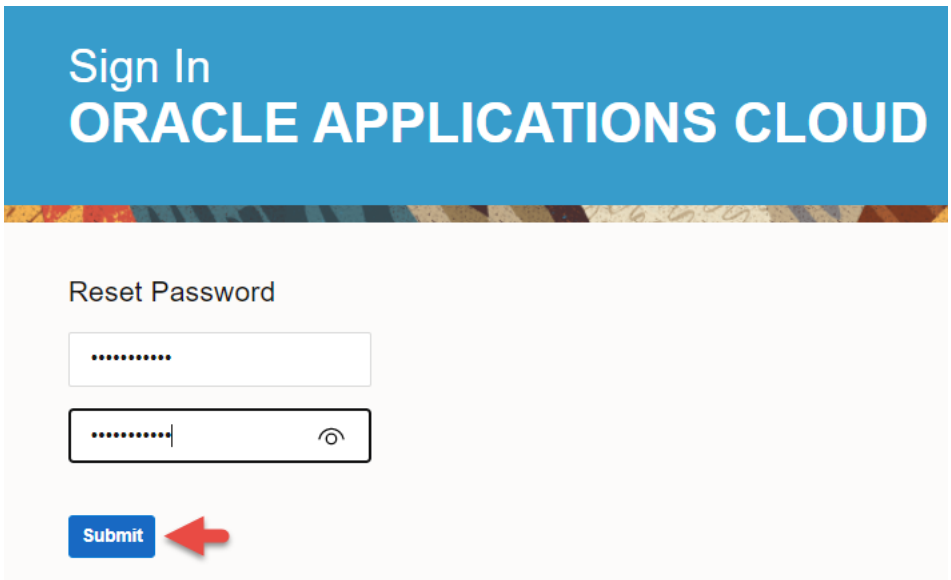
Oracle cloud application is a Web-based Navigator.

Sign In to Your Account

1. You will receive a Supplier Portal invitation with a custom link to create a password and log in.

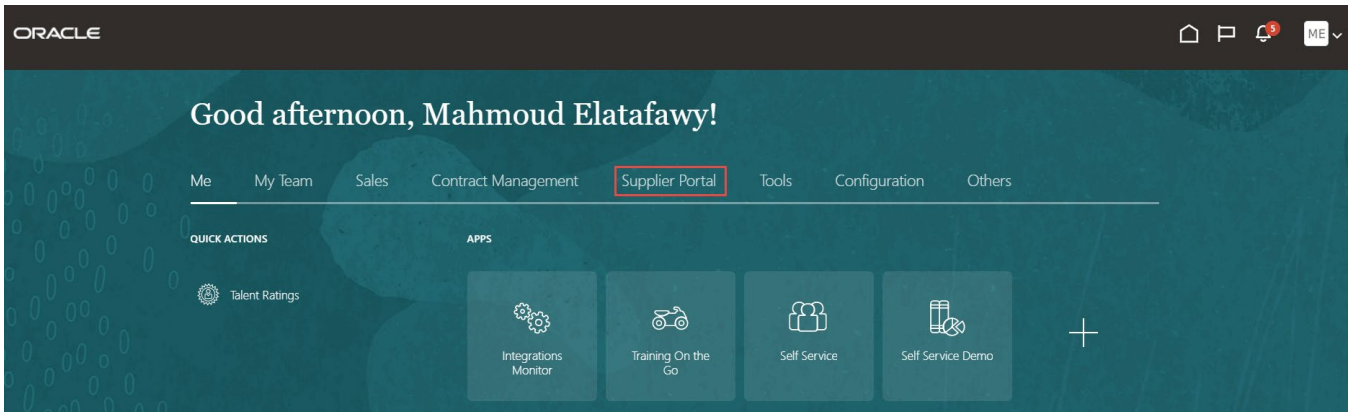


2. Click on the link to record the password a couple of times then click Submit



After you sign in, you'll get Oracle Cloud Home Page

- My Home provides you with a single-window to access all the service consoles applicable to you.

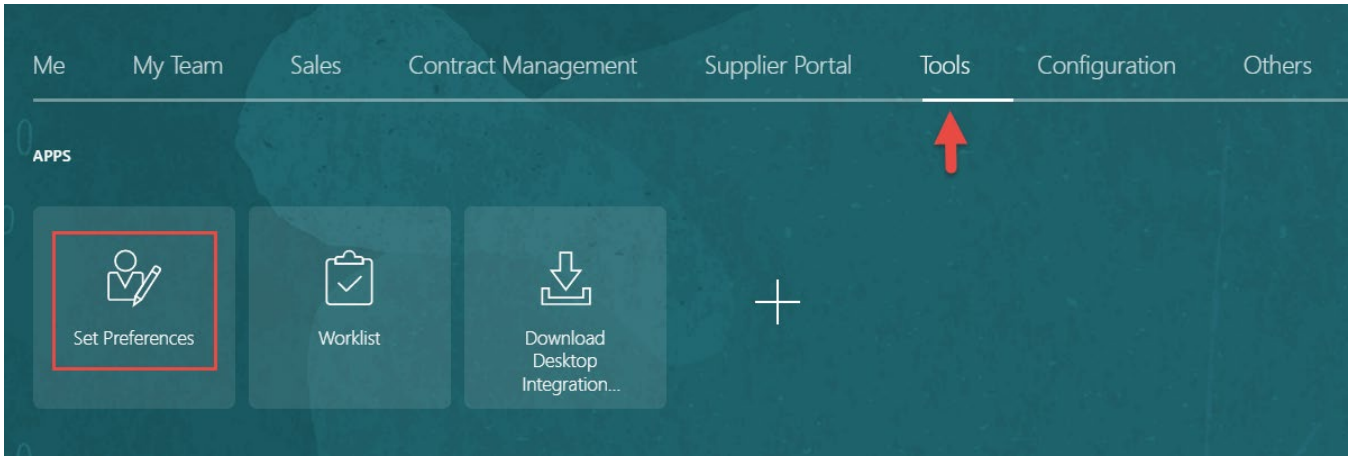


Setting Preferences

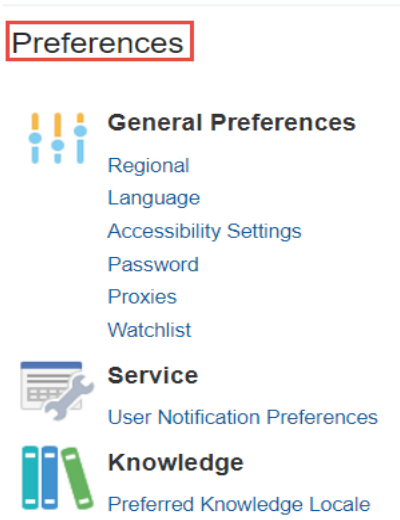
Setting Preferences allows you to define the default settings for both general areas of Awqaf Investment Company, thus eliminating the need to edit information each time you log in to Oracle Fusion Accounting.

Set General Preference

1. Sign in to Oracle Cloud Home Page
2. At the top right of the page, click on the user name > Set Preferences.



3. General Preferences region



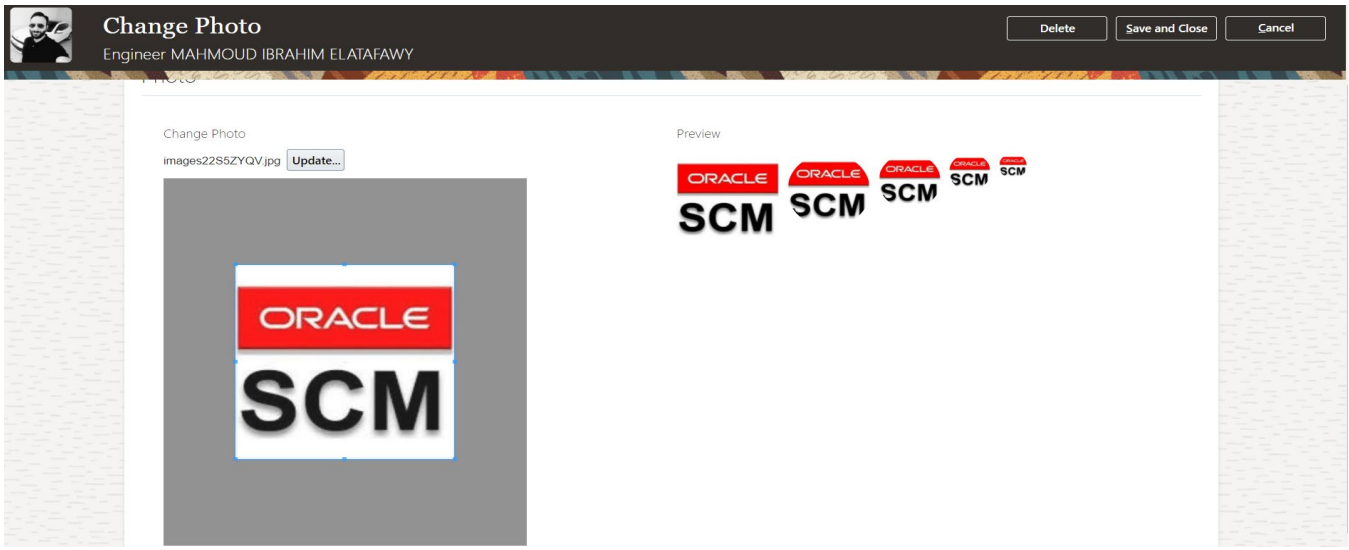
4. On the General Preferences region, click on Regional and set the preferences.



3. On the General Preferences region, click on Language and set the preferences.



4. On the General Preferences region, click on My Photo and select your photo.



Oracle Help Center

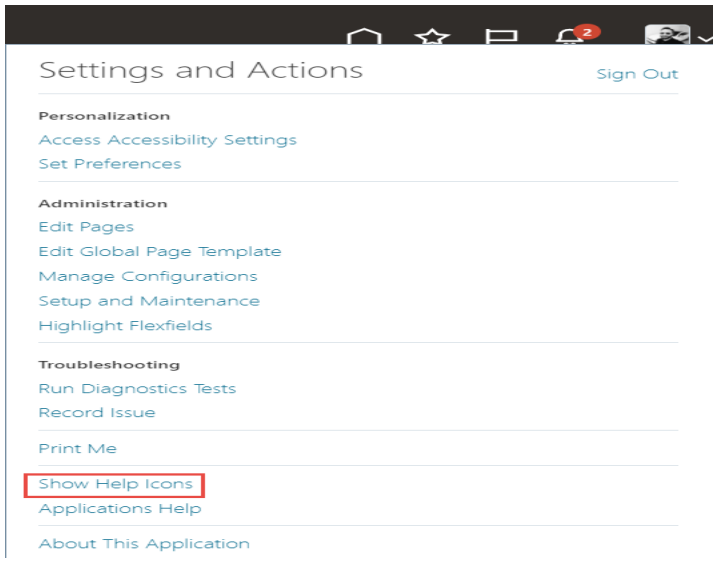
Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning.

Looking for documentation, tutorials, or videos so you can learn more about Oracle Cloud Services? You can find all of these resources and more here in the Oracle Help Center.

Show Help Icon

1. Sign in to your Cloud Account > Go to Setting and Actions > Select Show Help Icons

   However, not all pages have help icons.



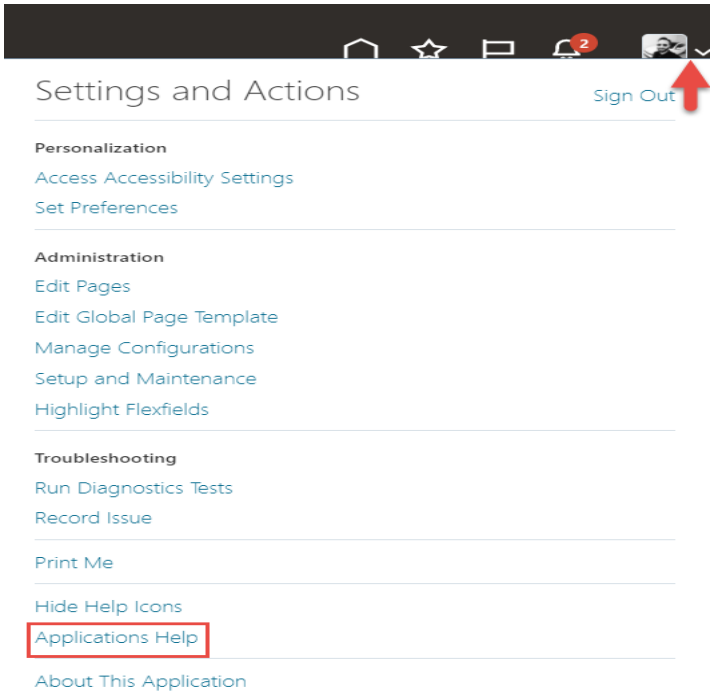
2. Navigate to Procurement > Purchase Requisition > Click on the help icon



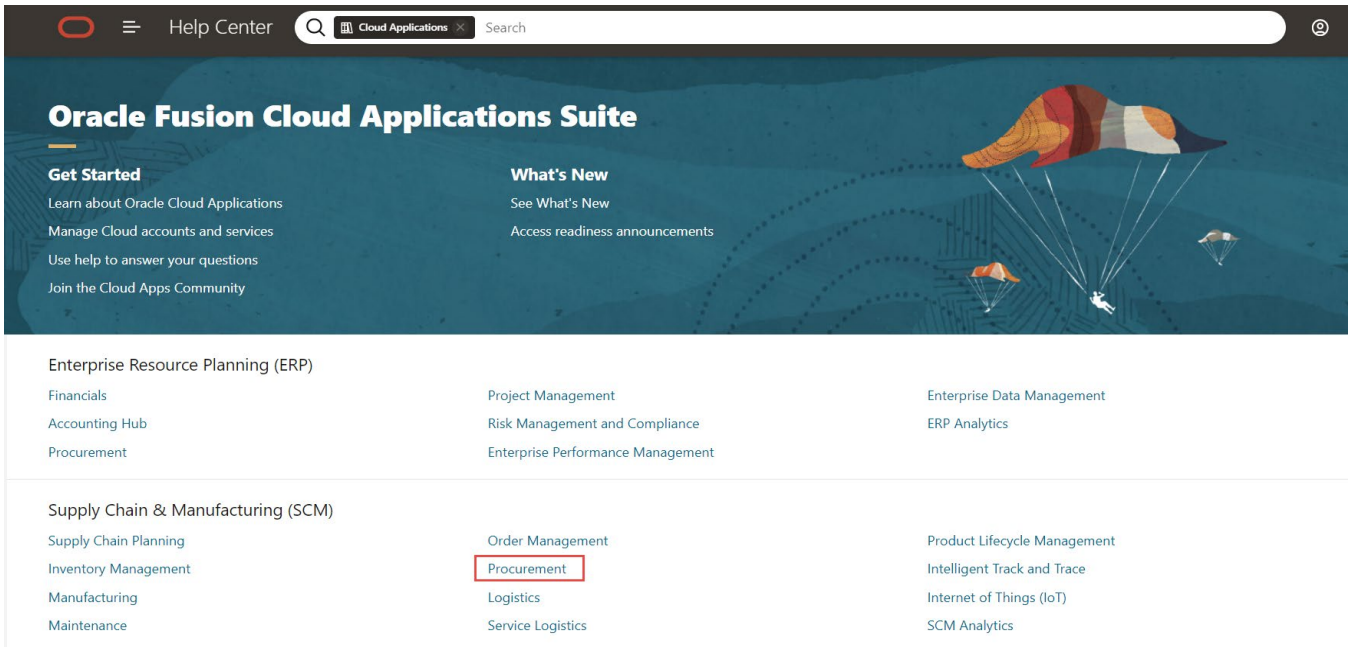
3. Click Search Help to find more sources

Get Application Help

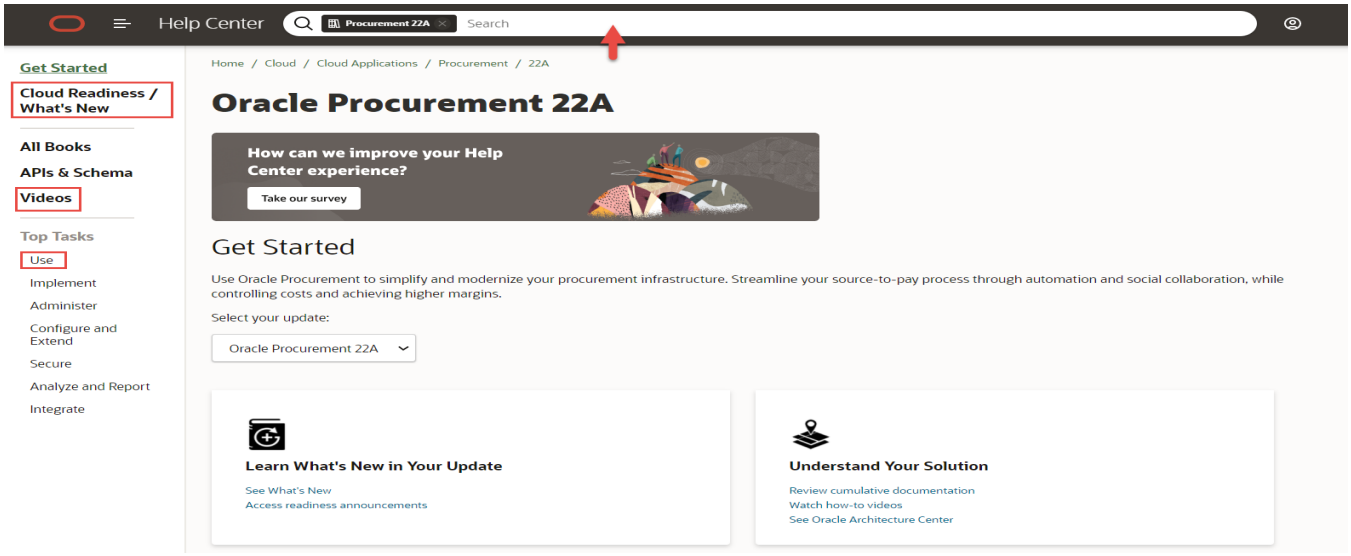
4. Go to Home Page > Open Setting and Actions > Select Application Help



5. Select Procurement Product



6. By accessing this page, You will be able to watch videos, review documents, see what's new...etc
    - In addition, You can use the search bar to find a specific topic or article.



Reference Videos

1. **Get Help in the Application**

   This video tutorial shows you how to find help for what you're working on in the application.

   https://youtu.be/T5POlakrLVY

2. **Getting Start**

   This video tutorial shows you how to proceed after you sign in to the application.

   https://youtu.be/hjSGKE2yp7g

3. **Introducing the Supplier Model**

   This video shows you how to create Suppliers

   https://youtu.be/Yi6xLT2T7io

4. **Introducing the Supplier Portal Model**

   This video shows you how to use Supplier Portal

   https://youtu.be/69QAcQDzxVM

5. **Get Started with Oracle Social Network**

   Learn how to navigate Oracle Social Network and global search functionality to quickly find what you are looking for

   https://youtu.be/3VEyhmGxeSg

Supplier Registration

This chapter covers the following topics:

- External Supplier Registration

Supplier Registration Overview

The Supplier Registration process is used by companies to submit their registration request to become a supplier of the buying organization.

External Supplier Registration

The buying organization makes a supplier registration URL available to potential suppliers.

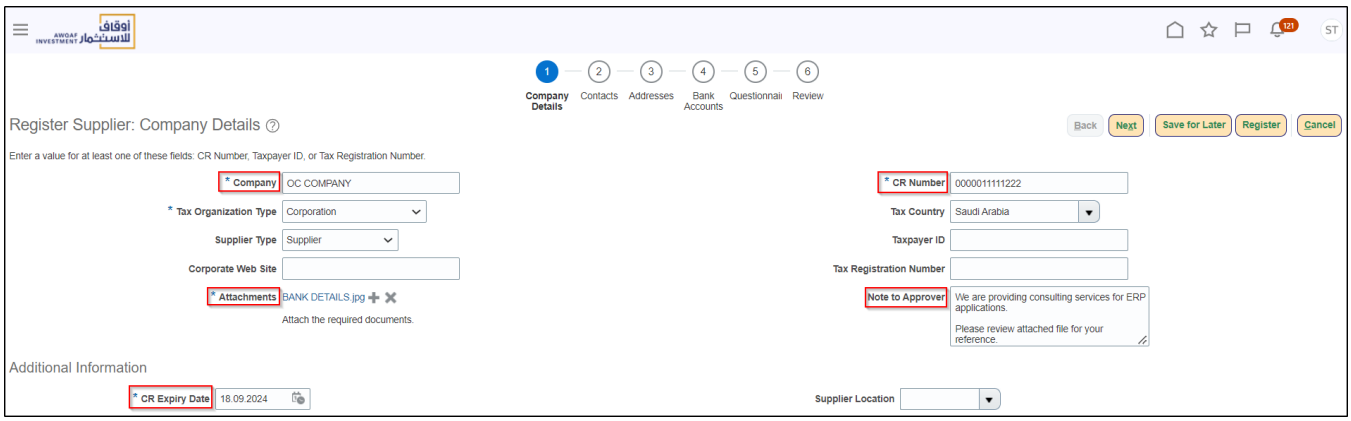
Here is how the supplier registration process works:

The potential supplier enters all required information and submits the registration request. Suppliers can save their in-process registrations if they need to gather the requested information and return to submit the registration later.

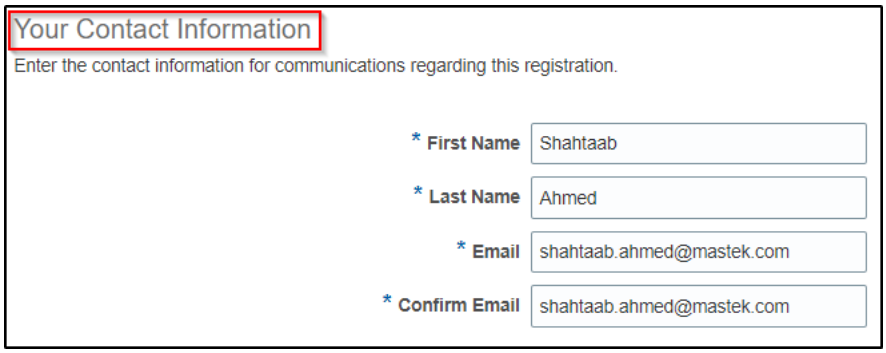
When a supplier is created, and during the supplier registration approval process, the application performs checks to avoid adding duplicate suppliers. The matching engine is supported by the Oracle Enterprise Data Quality application which can perform matching checks against all external parties.

1. External supplier access AIC registration URL, This takes you to the Register Supplier page.
2. Go to Company Details > Enter the required fields marked with * as follows:

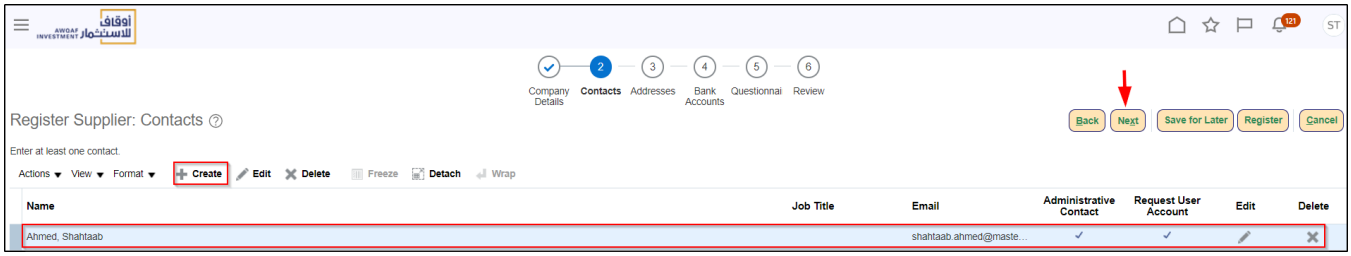
Field	Description
*Company	Enter your supplier name
*Tax Organization Type	Select Corporation
Supplier Type	Select categorization of the supplier
*CR Number	Enter company commercial registration number
*CR Expiry Date	Enter CR expiry date
Note to Approver	Add notes to AIC approvals
* Attachments	Add the required documents and any supporting document



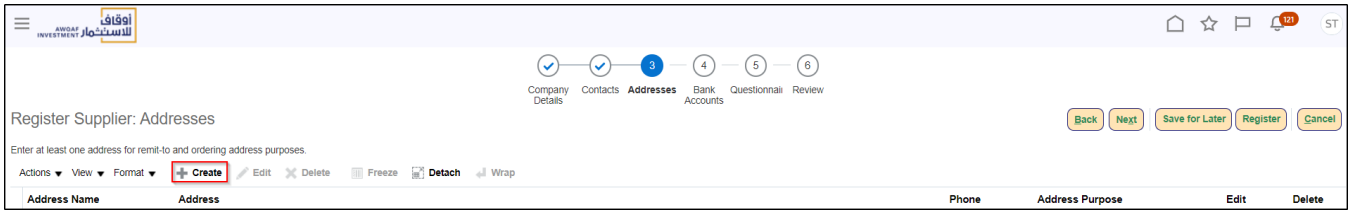
3. Go to Contact region > Enter your contact details as follows:



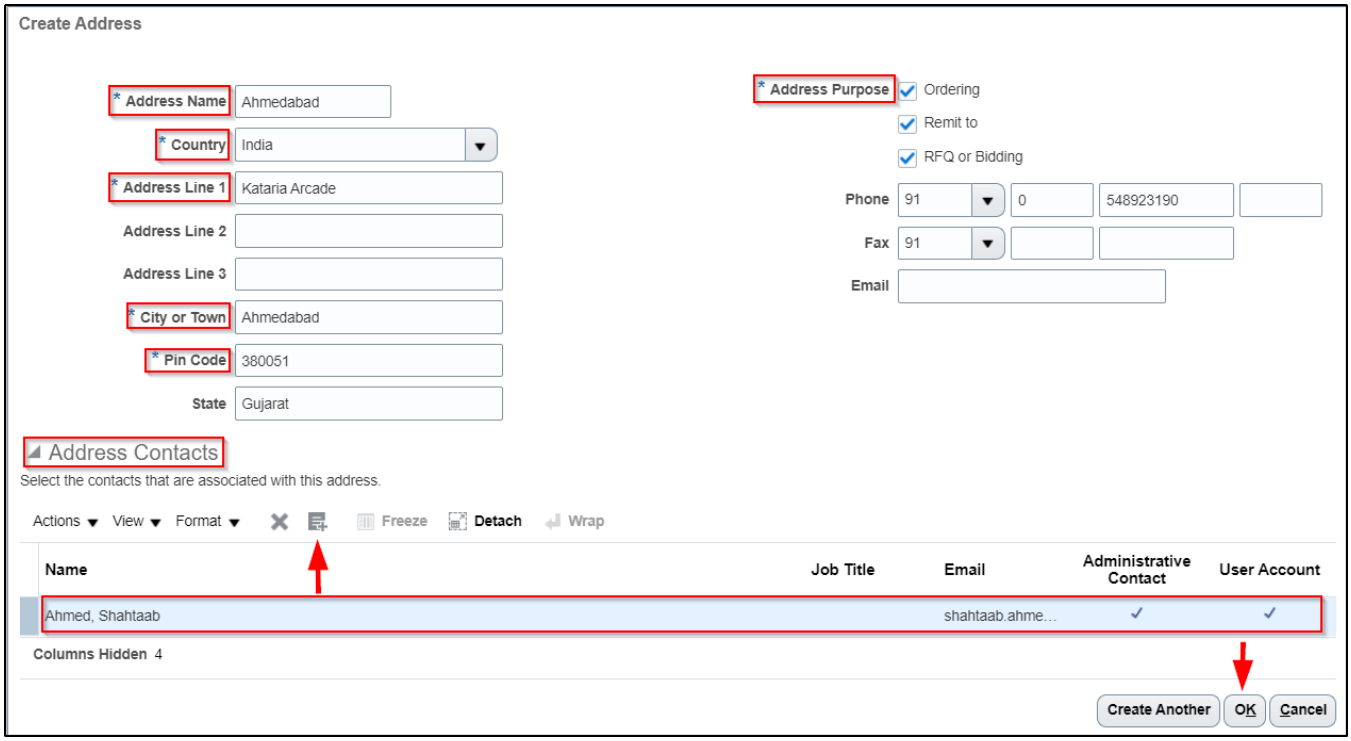
4. Click Next to navigate Contacts page where you can review or edit your contact details and add more contacts



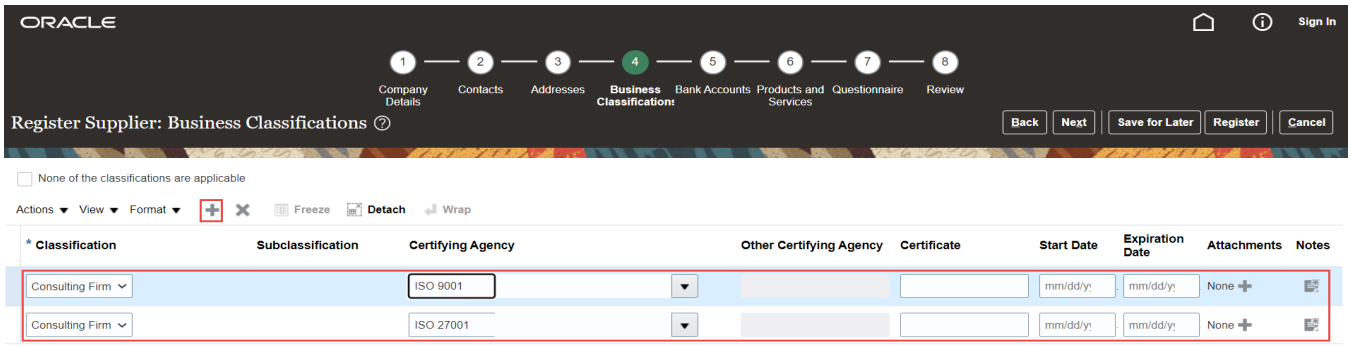
5. Click Next to navigate Address page > Click Create to add address details



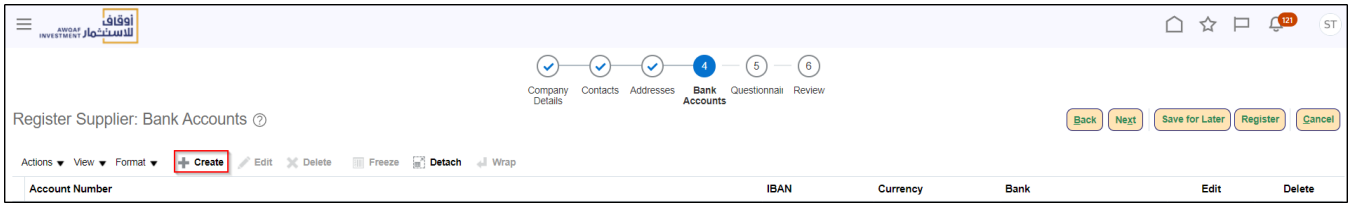
6. This takes you to Create Address page where you can enter the address details, specify Adress Purpose, and assign Contacts by clicking on the Select and Add icon then click Ok.



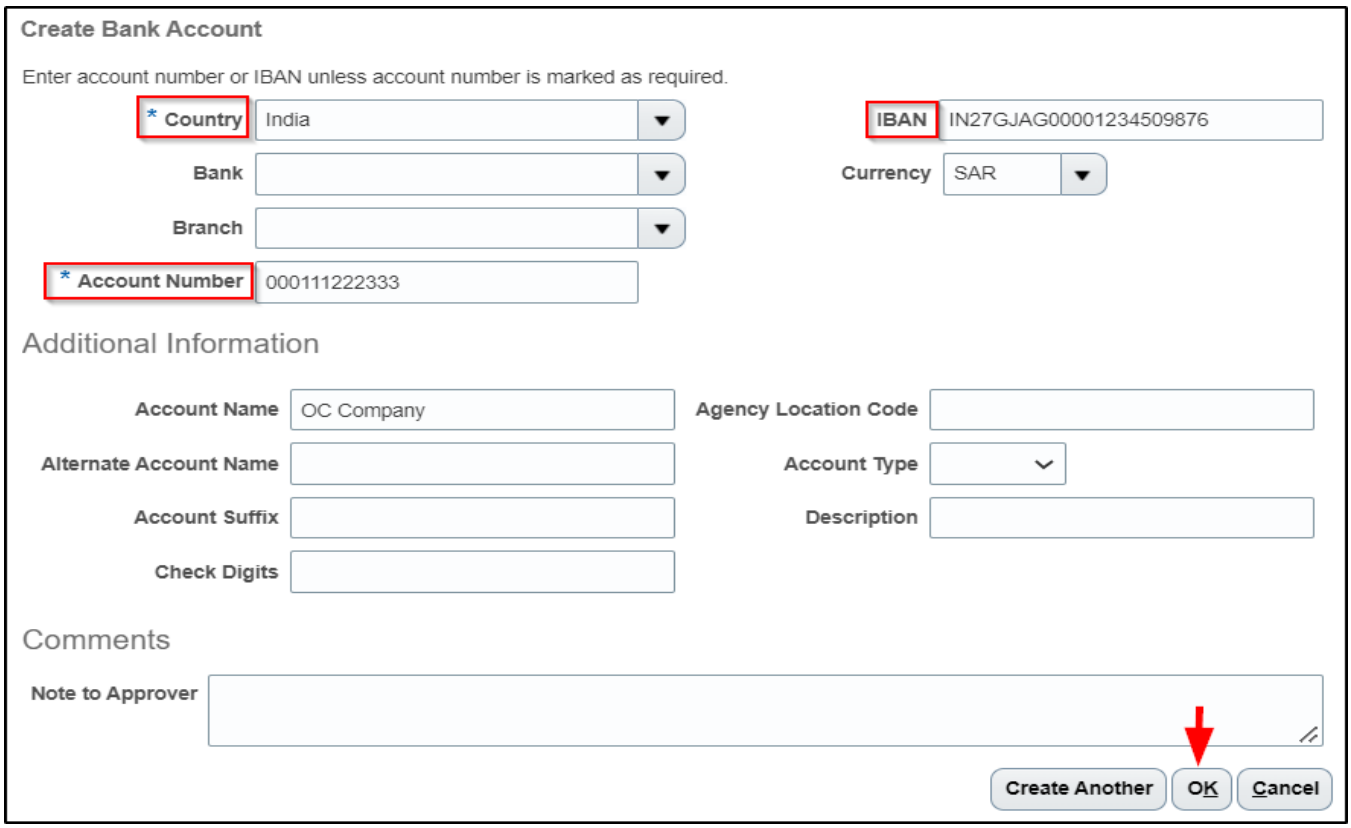
7. Click Next to navigate to the Business Classifications page > Click Add to specify the business classifications and captures the certification details.



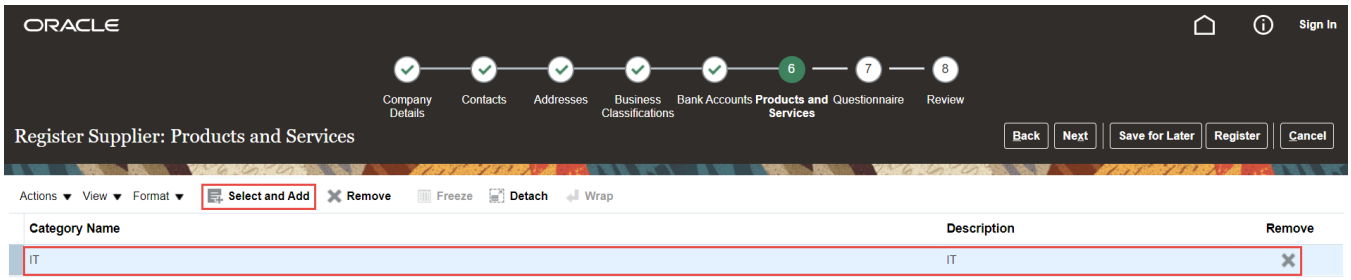
8. Click Next to navigate Bank Accounts > Click Create



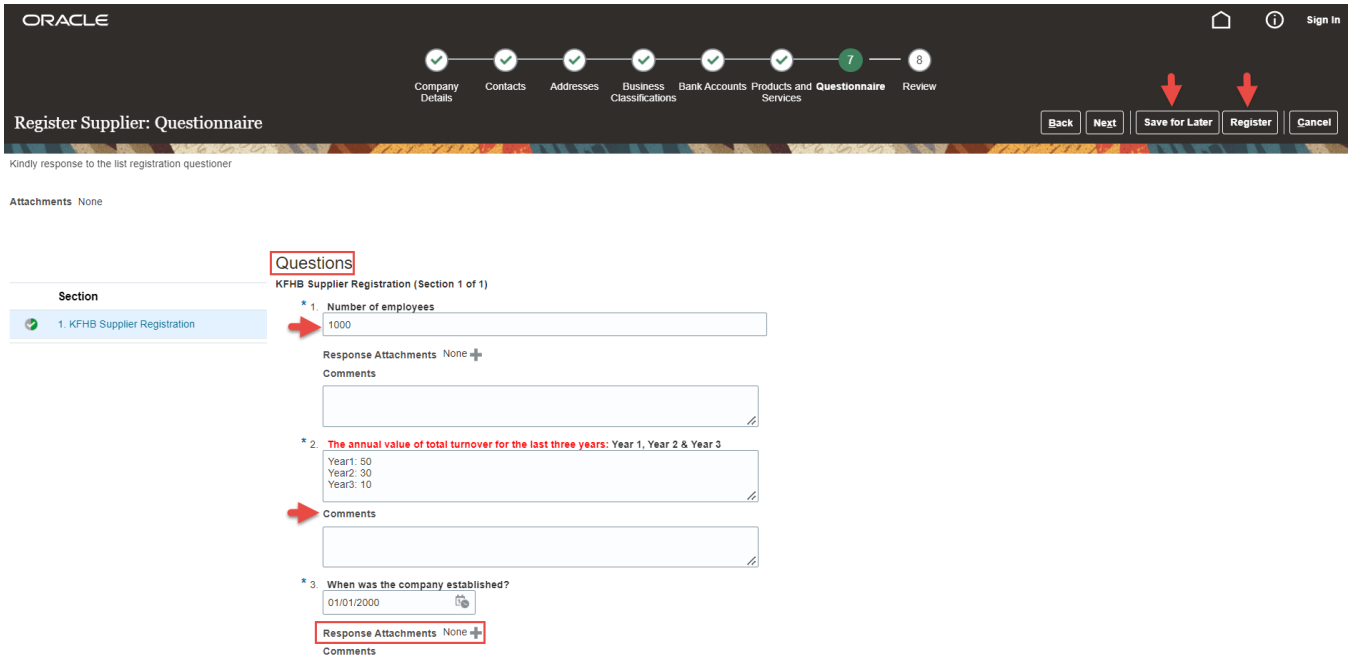
9. It takes you to the Create Bank Account page where you can Capture the bank account details where the company would like to receive payments then click OK.



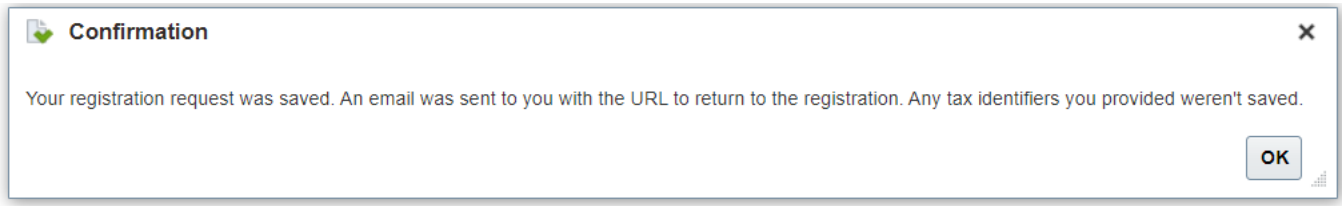
10. Click Next to navigate Product and Service > Click Select and Add to capture the details of the types of products and services supplied by the company.



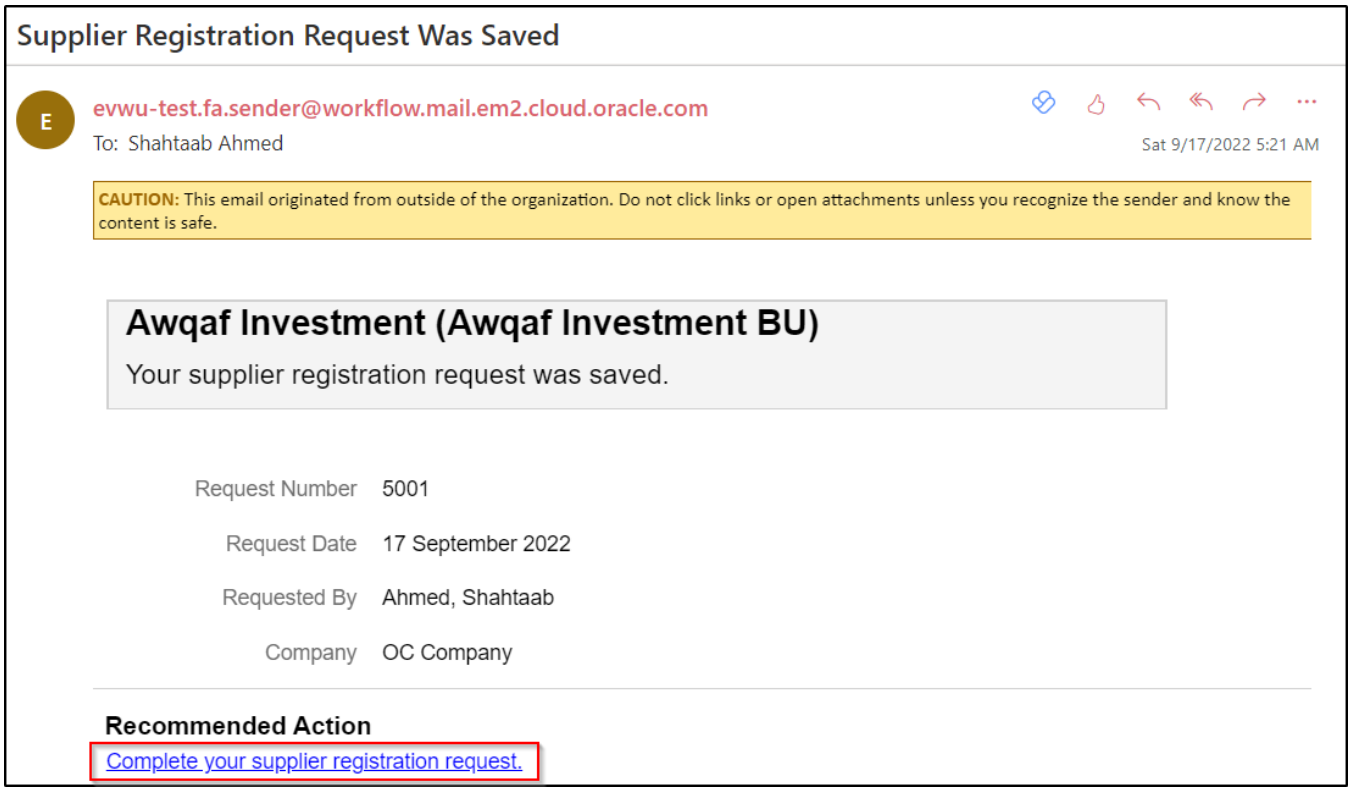
11. Click Next to navigate to the Questionnaire page where you can capture responses to additional registration questions.



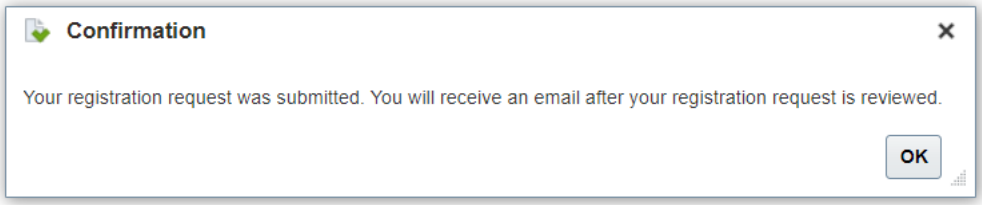
12. When you click on Save for Later, a notification is sent to the email address that was entered in the Your Contact Information region on the Company Details page.



13. Click OK to close the confirmation window.
14. Access email notification which includes the URL to be used for returning to the registration process.



15. Once the registration details are reviewed and ready to submit then click Register, a notification is sent to the email address that was entered in the Your Contact Information region on the Company Details page.



16. Click OK to close the confirmation window.
17. The application sends an email notification to the registered supplier contact with a valid email address. In addition, an automated email notification is sent to suppliers at the moment they are requesting more information or approved as Spend Authorized.

Supplier Portal

This chapter covers the following topics:

- Access Notification
- Overview Menu
- Supplier Profile Management
- Acknowledgment
- Response to Quotation
- Response to Qualification
- View Transactions

Supplier Portal

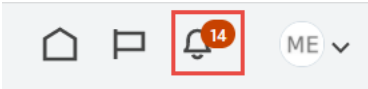
The Supplier Portal page serves as the landing page for Oracle Fusion Supplier Portal and provides quick access to tasks and reports relevant to you.

The content that you can access in the Supplier Portal is controlled by your job role and your data access settings.

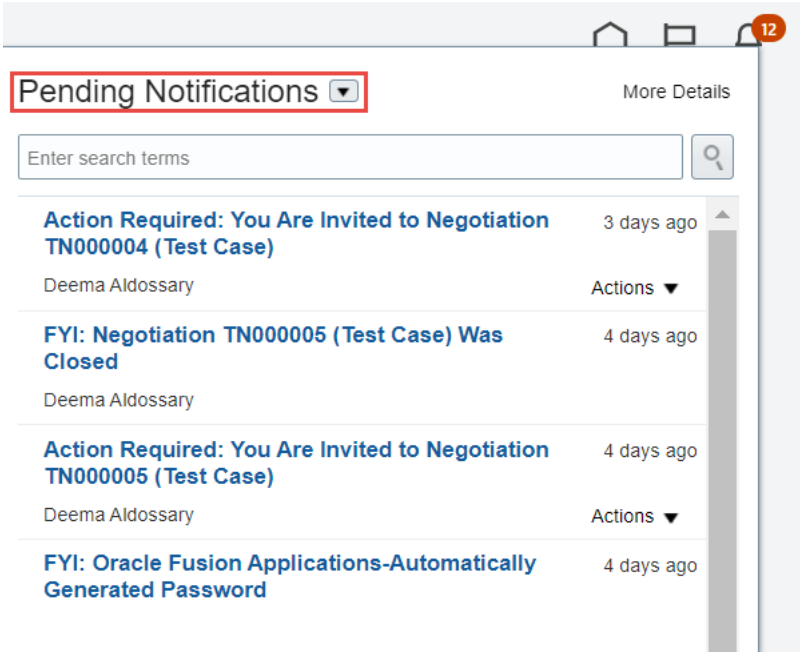
The Supplier Portal page includes an integrated search facility to locate particular orders, agreements, shipments, and so on, a Tasks list from which to access all Supplier Portal tasks and reports, and several dynamically updated infolets. Infolets provide interactive graphic readouts of critical real-time information, such as supplier transaction reports, for example.

Access Notification

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

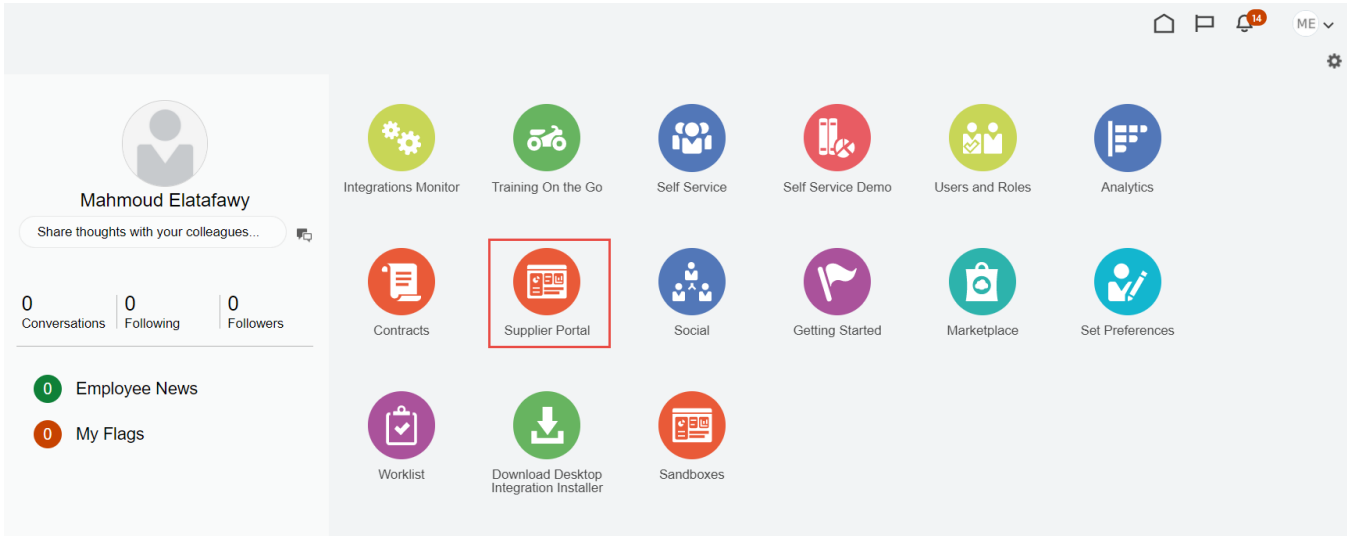


2. Clicking on the notification brings you to the Pending Notification since can open, view, and take actions.

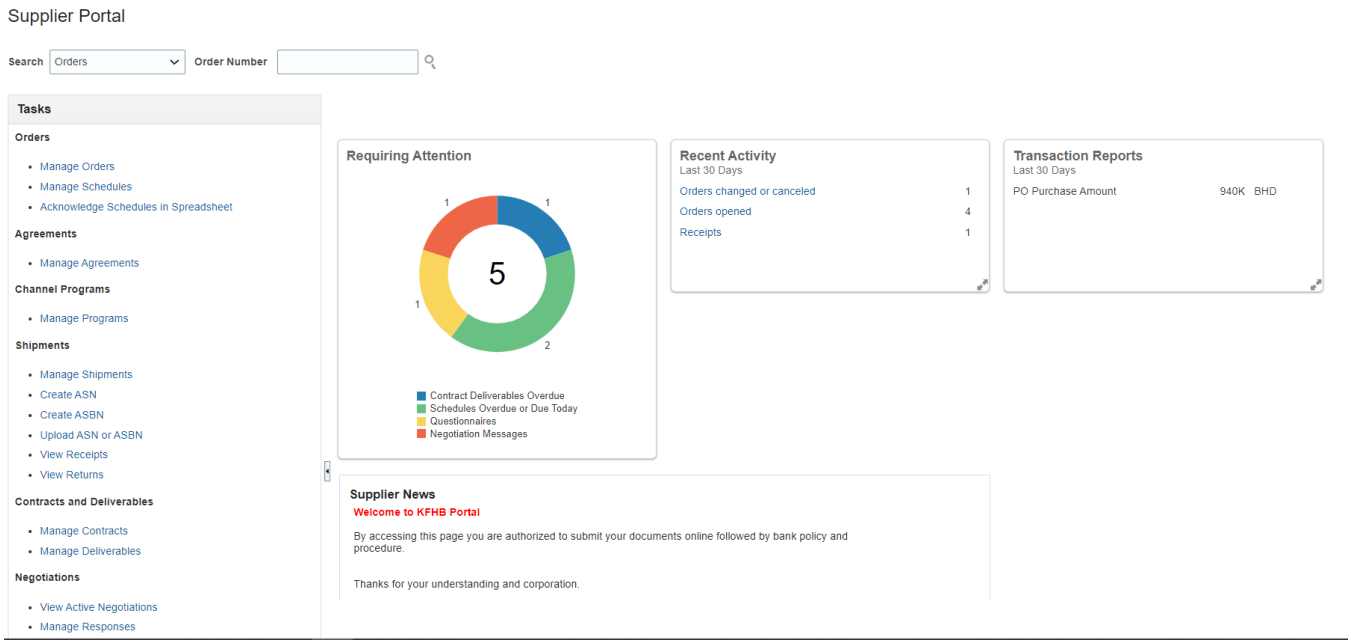


Overview Menu

1. On the home page, click on the Supplier Portal icon to open the “Overview” page.



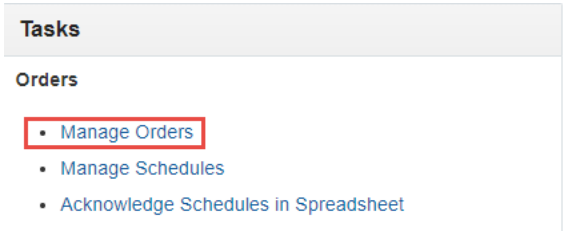
2. The overview page provides a snapshot of **AIC's** most recent transactions as well as anything requiring attention.



Manage Orders

For many procurement activities, you must identify the suppliers whom you want to deal with.
Supplier numbering is automatically generated, The predefined default number is 10001. The supplier number increments with each additional supplier created.

1. Navigate to Tasks > Orders > Manage Orders.



2. This will take you to the Search page hence you can use the following options:

Basic Search

The basic search function is available on the Manage Suppliers page and uses keywords to quickly identify a single supplier or group of suppliers who match the search values you enter. You can use one or more than one search field to narrow your search when targeting a particular supplier.

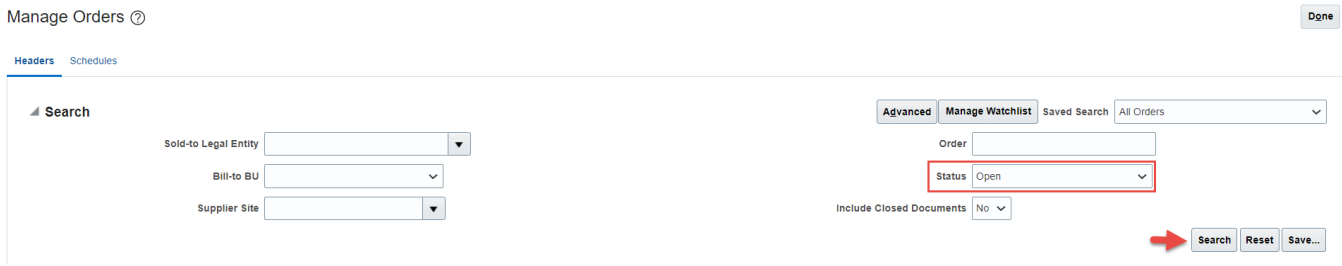
Advanced Search

While on any search page, click Advanced Search to use multiple search fields to perform a more specific search based on supplier attributes. All of the search fields on the advanced search page are selectively required (instead of being always required). You can choose only fields you want to search on, although you must enter a search value in at least one search field.

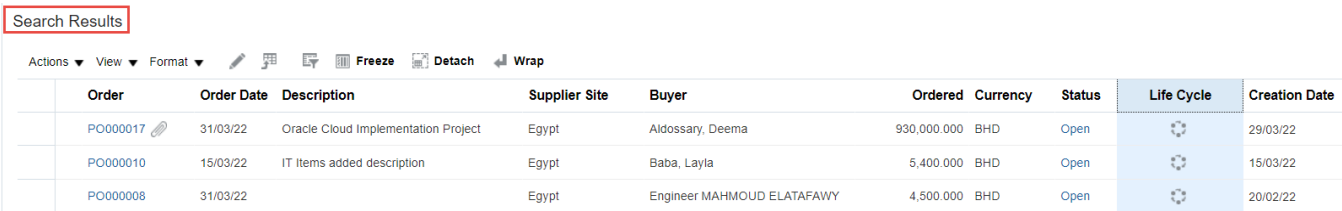
When using advanced search, use the **Add Fields** button to display a list of additional search fields. You can select one or more search fields, add them to the search panel and enter values to search on.

Perform Supplier Search

Enter your search criteria then click Search.



3. Go to Search Result > View transaction detail.



Supplier Acknowledgment

Some **AIC** purchasing documents will require a supplier acknowledgment within the Portal. The document will not be considered “Open” until the Supplier completes the acknowledgment process.

1. If an acknowledgment is required, the email subject will include “Requires Acknowledgment”.

Access this task in the Workspace Application

Document (Buyer Change Order) PO000008 Change Requires Acknowledgment

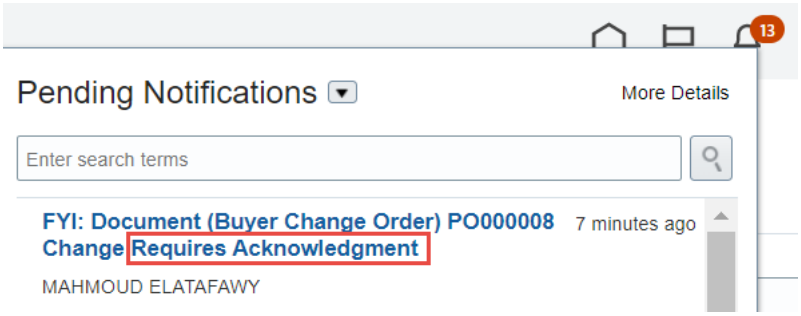
Details

Assignee	Mahmoud Elatafawy	**Sold-to Legal Entity**	Kuwait Finance House Bahrain
From	Engineer MAHMOUD IBRAHIM ELATAFAWY	**Order**	PO000008
Assigned Date	05/04/22 1:36 PM	**Buyer**	Engineer MAHMOUD IBRAHIM ELATAFAWY
Due Date	08/04/22 1:36 PM		
Task Number	286070		

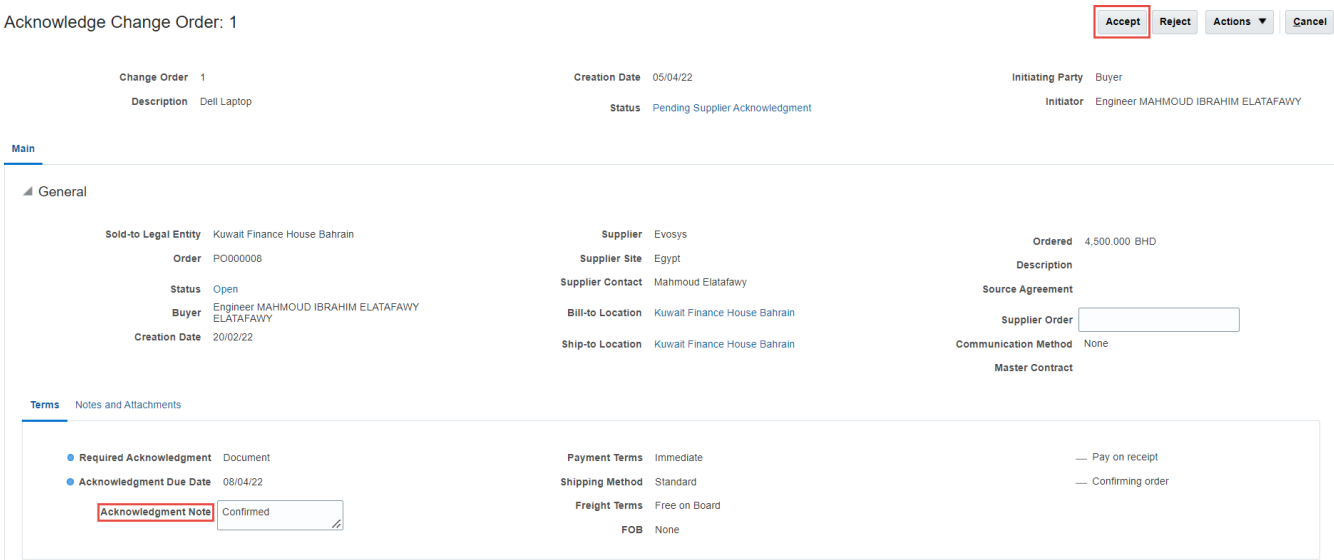
Recommended Actions

- Review and Acknowledge

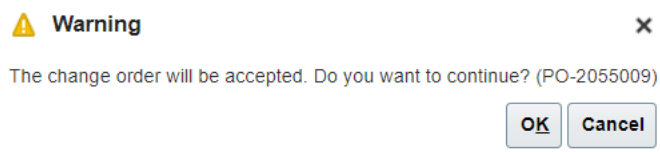
- A notification alert will also be displayed at the top of the Supplier Portal to note action is required.



2. Navigate to Recommended Actions > Click Review and Acknowledge.
3. Enter Acknowledgment Note then click Accept.

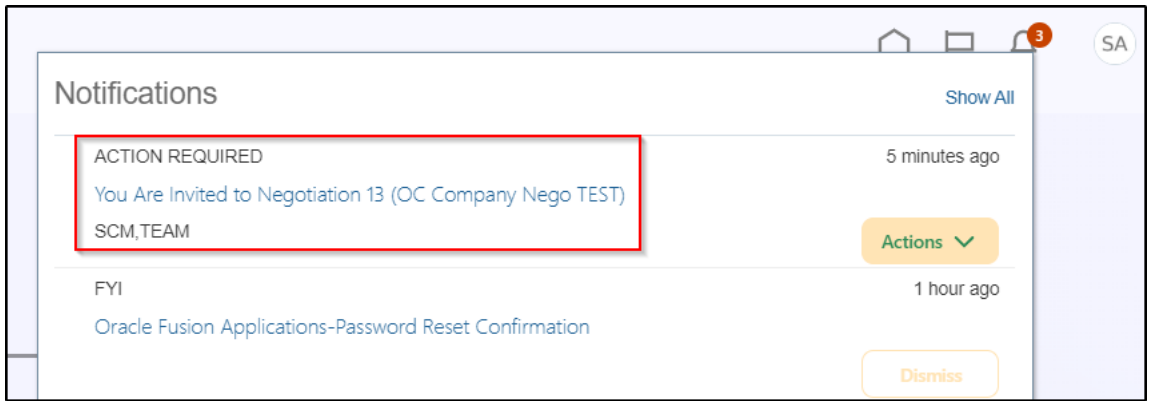


4. Warning message display, click Ok.



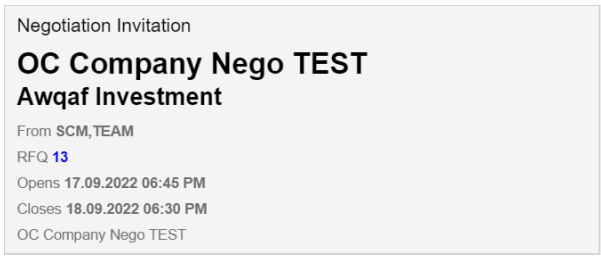
Respond to Negotiation

1. Sign in by Supplier User account > Notifications > Acces Task with the subject '**You Are Invited to Negotiation**'.
   - Also, you will be notified by email.

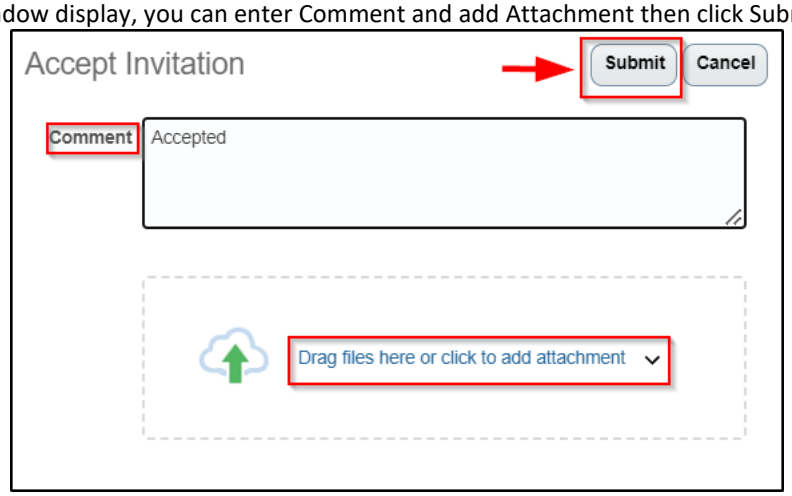


2. Open notification > Click Accept Invitation.





3. Accept Invitation window display, you can enter Comment and add Attachment then click Submit.

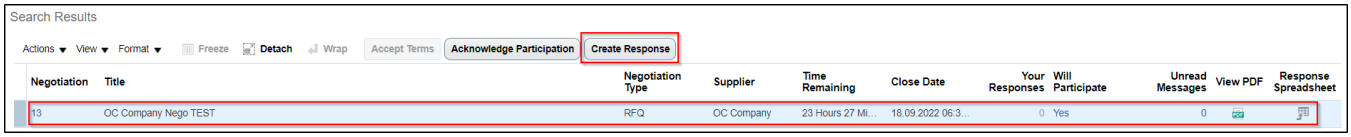


To Respond to Negotiation

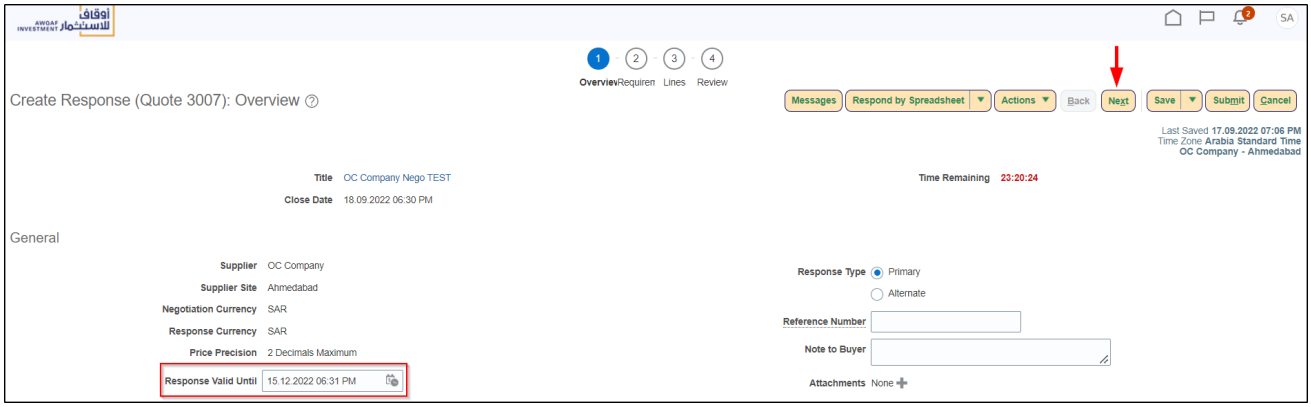
4. Navigate to Supplier Portal > Tasks > Negotiations > View Active Negotiations.



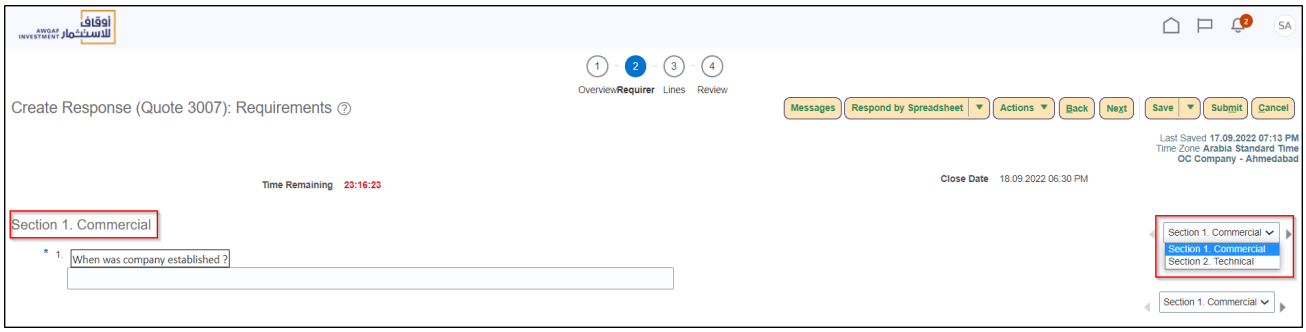
5. Navigate to Search Result > Select Negotiation > Click Create Response.



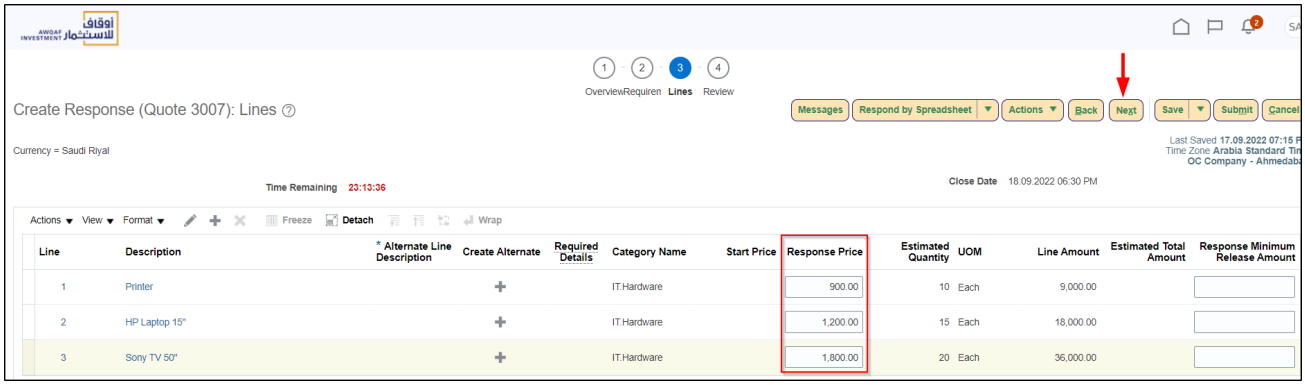
6. **Create Response** page will display, enter Response Valid Until date and you can add Attachments then click Next.



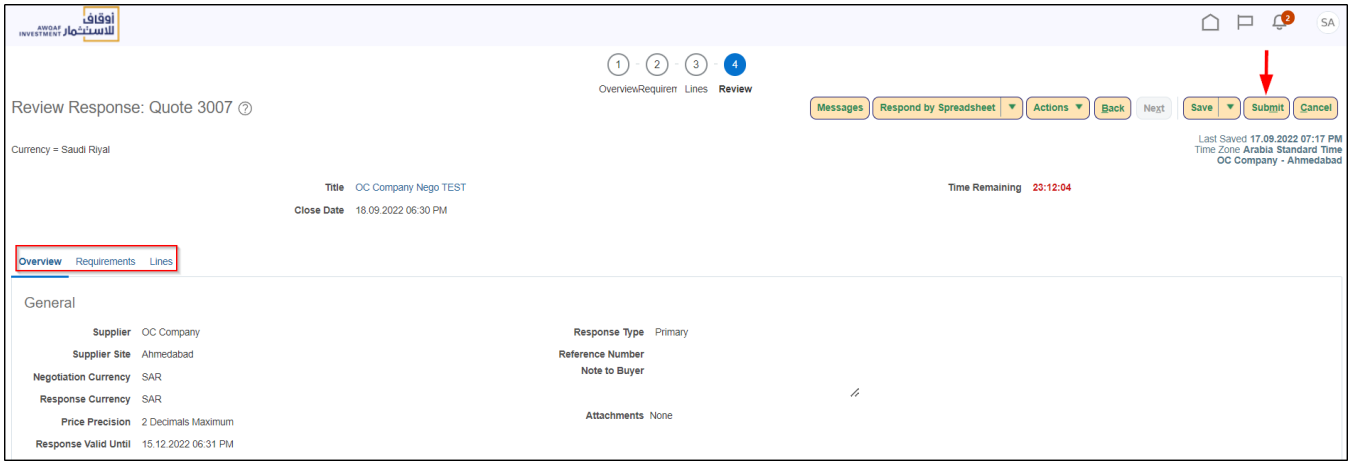
7. The **requirements** page will display hence you have to reply to all required sections followed by * then click Next.



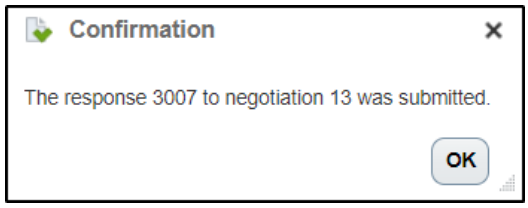
8. The **lines** page will display, enter Response Price for each line then click Next.



9. The **review** page will display hence you can review all inputs, Click Submit to confirm.



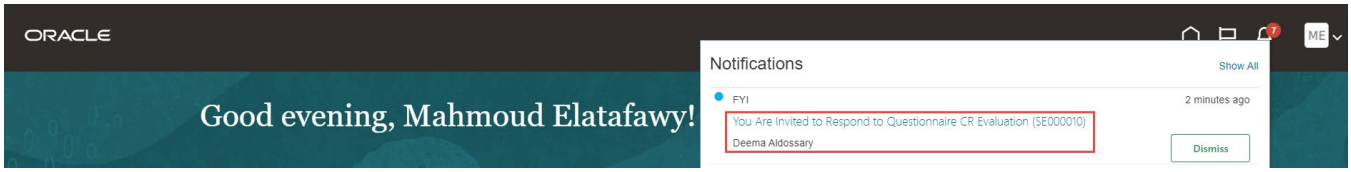
10. Confirmation message showing 'Negotiation was submitted'.



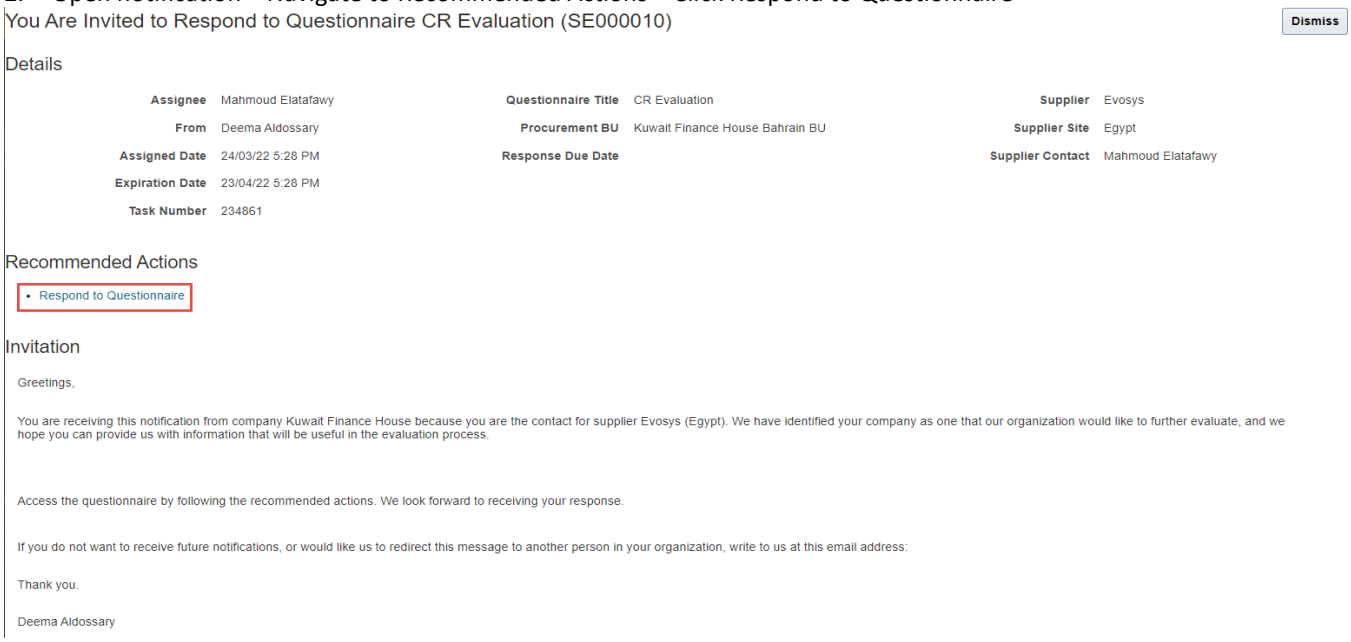
11. Click OK to close the window.

Respond to Questionnaire

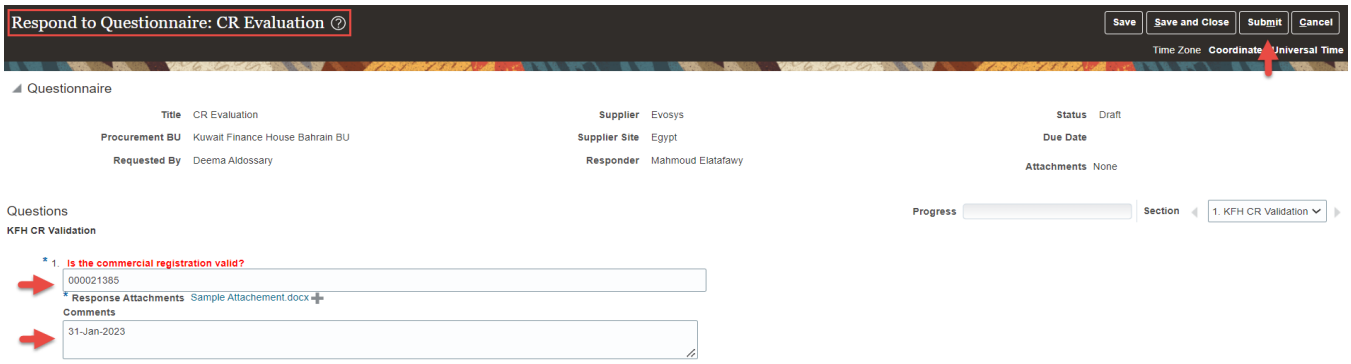
1. Sign in by Supplier User account > Notifications > Acces Task with the subject '**You Are Invited to Respond to Questionnaire**'.
   - Also, you will be notified by email.



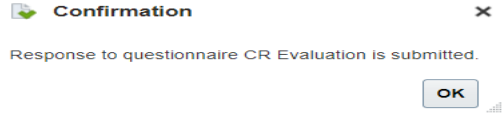
2. Open notification > Navigate to Recommended Actions > Click Respond to Questionnaire



3. Answer the questionnaire and submit it, you have to do the same process for each supplier.



4. Click Submit



5. Click OK to close the confirmation window.

Online Message

Throughout a negotiation, there may be times when you must communicate with other internal users (such as members of your negotiation collaboration team) or suppliers to provide additional information or clarification. Also, collaboration team members may want to communicate with each other. You can use online messages to communicate online with other participants in your negotiation.

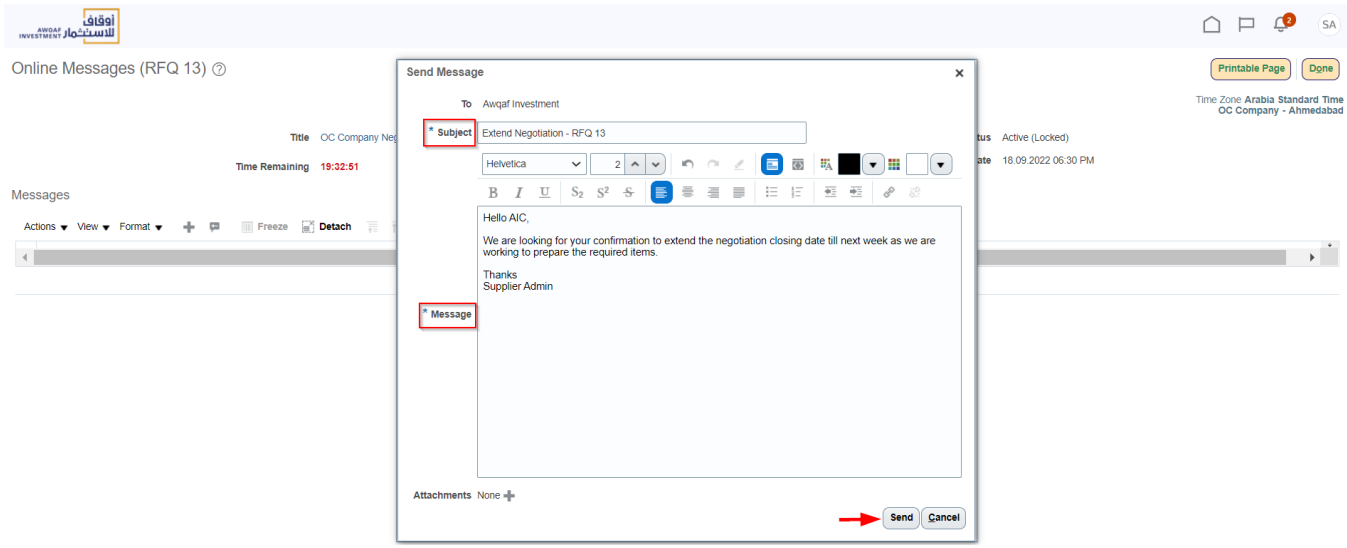
1. Navigate to Tasks > Manage Responses > Select Negotiation to open.



2. Click Message.



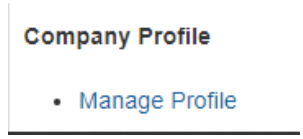
3. Online Message display, Click create icon ➕.
4. Send Message window display, enter Subject and enter Message.



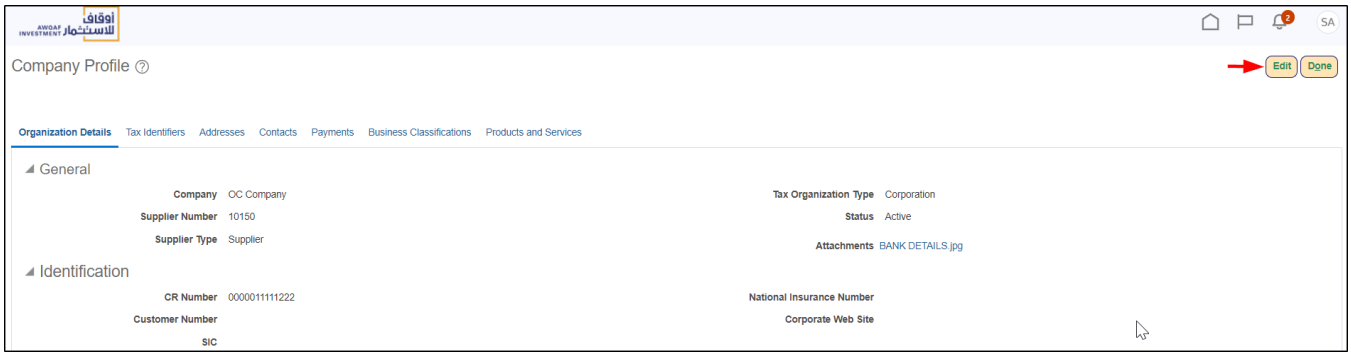
5. Click Send.

Manage Profile

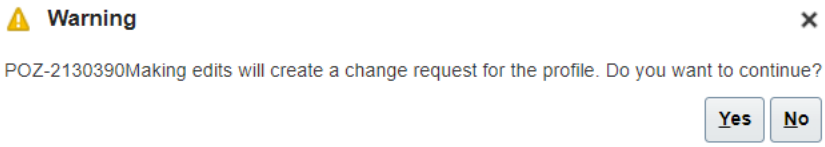
1. Sign in by Supplier Admin User > Navigate to Tasks > Company Profile > Manage Profile.



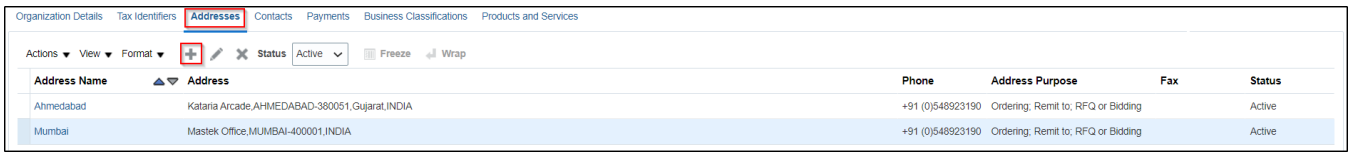
2. Click Edit.



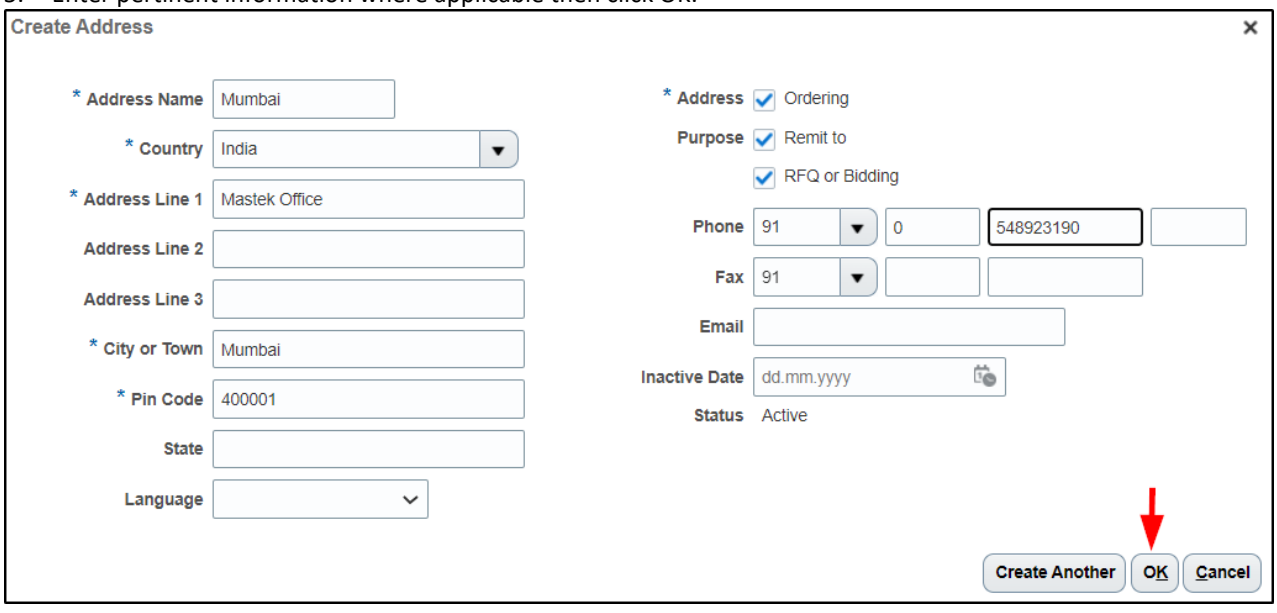
3. This will generate a pop-up stating you will be making edits to the profile > Click Yes to confirm.



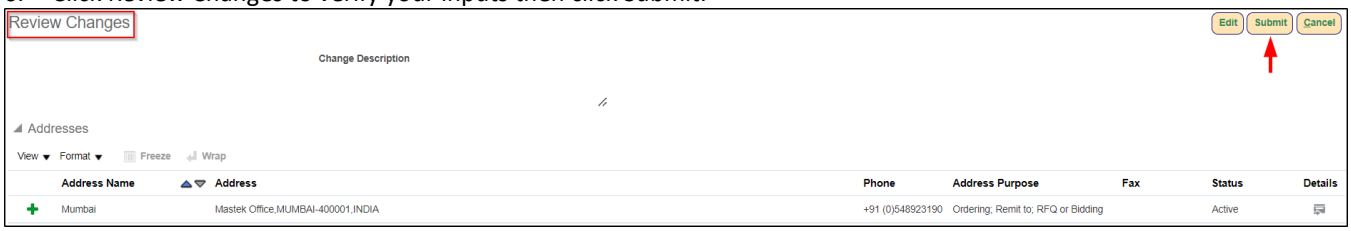
4. Select the detail you'd like to update.
   - You can update your Name, CR Number, Address, Contacts, or Products and Services.
   - Select Address > Click Create icon ➕.



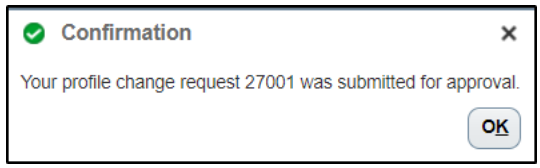
5. Enter pertinent information where applicable then click OK.



6. Click Review Changes to verify your inputs then click Submit.



7. You will receive a pop-up notification, Click OK.



8. Click Done on the top right corner to return to the overview page.