



UK Research
and Innovation



Guide to Supplier Portal

How to guide for suppliers

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Learning objectives

This guide will show you how to:

- Log in to the supplier portal
- Manage supplier's company profile and bank details
- Create invoices
- Create credit note for purchase order
- View invoices and payments

Key concepts and terminology

Oracle terminology	Description
Supplier	A supplier is a person or business that provides a product or service to another entity.
External Suppliers	External suppliers refer to vendors or organizations that are not directly part of the internal enterprise but are registered in the system to provide goods or services. These suppliers are typically external to the company's internal network and are managed through the supplier portal.
Credit Memo	Refers to a document issued by a supplier to the buyer, acknowledging a reduction in the amount owed for a previously issued invoice. In the supplier portal, suppliers can create a credit memo (credit note) as part of the invoicing process.
Purchase Order	Refers to a document created by a buyer that outlines the goods or services they wish to purchase from a supplier, including details such as quantities, pricing and delivery instructions.

Overview

- The Supplier Portal in Oracle Fusion is a self-service platform that enables suppliers to manage their business transactions with an organization efficiently. It provides a centralized interface for suppliers to perform key procurement tasks by providing real-time access to supplier related processes.
- Through the Supplier Portal:
 - suppliers can update company details and manage banking information.
 - submit invoices linked to purchase orders and create credit notes when required.
 - view payment statuses and invoices to reconcile transactions.

You can access our supplier information and guide from our website:

www.uksbs.co.uk/services/supplier

www.uksbs.co.uk/services/procurement

Process flow – supplier management

The supplier management process in Oracle Fusion is a comprehensive workflow that enables organizations to manage their supplier relationships efficiently. Suppliers can register themselves, update company and bank details, manage purchase orders, create invoices and credit notes, and track payments and receipts through the supplier portal.

Update the
company profile of
the supplier
through supplier
portal

Update the bank
details of the
supplier through
supplier portal

Create invoices
linked to purchase
orders

Generate credit
notes when
required

Access invoices
and payments in
the supplier portal

Topic 1: Supplier portal login

Supplier portal login

To log in to the Supplier Portal, please Click here: [Log in](#)

1. On the Supplier Portal Sign-In page. Please use **Forgot Password** link to reset password (for first-time login).

2. If not a first-time login, enter supplier email and password and click 'Sign in'

Oracle Fusion Supplier Portal

User Name

Password

[Forgot Password?](#)

[Sign In](#)

[Need help signing in?](#)

1

Select the 'Forgot password' link to reset password (for first time log in)

Oracle Fusion Supplier Portal

User Name

Password

[Forgot Password?](#)

[Sign In](#)

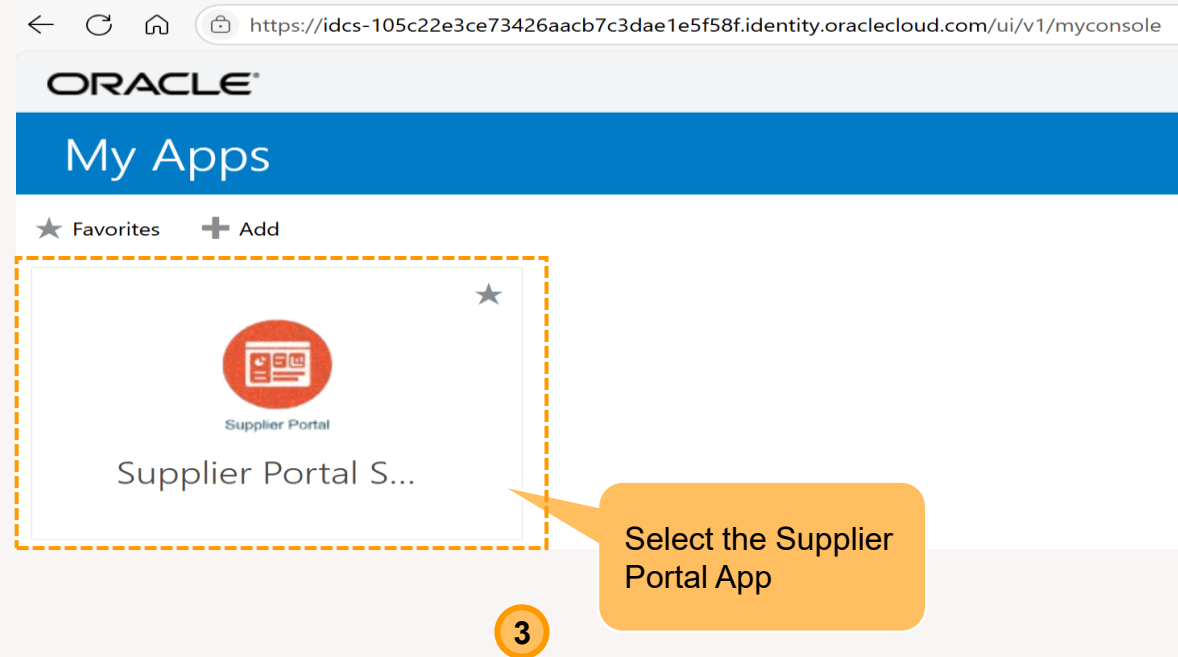
[Need help signing in?](#)

2

Enter supplier email and password and select 'Sign In'

Supplier portal login (cont'd)

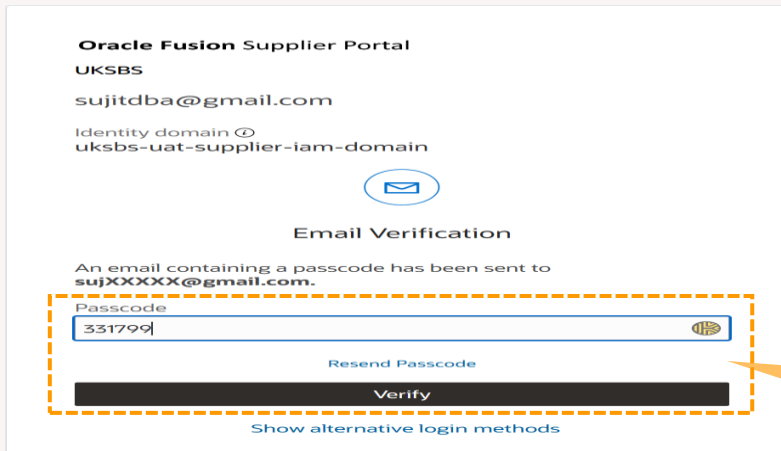
3. Suppliers are redirected to the following page post log in. Select the Supplier Portal app from the My Apps page



Supplier portal login (cont'd)

4. On the multifactor authenticator screen, enter the one-time passcode that is sent to the registered supplier email and select 'Verify'.

5. You will then be successfully logged in and will be able to view the Supplier portal dashboard in Fusion.



Oracle Fusion Supplier Portal
UKSBS
sujitdba@gmail.com
Identity domain @
uksbs-uat-supplier-iam-domain

Email Verification

An email containing a passcode has been sent to sujXXXXX@gmail.com.

Passcode
331799

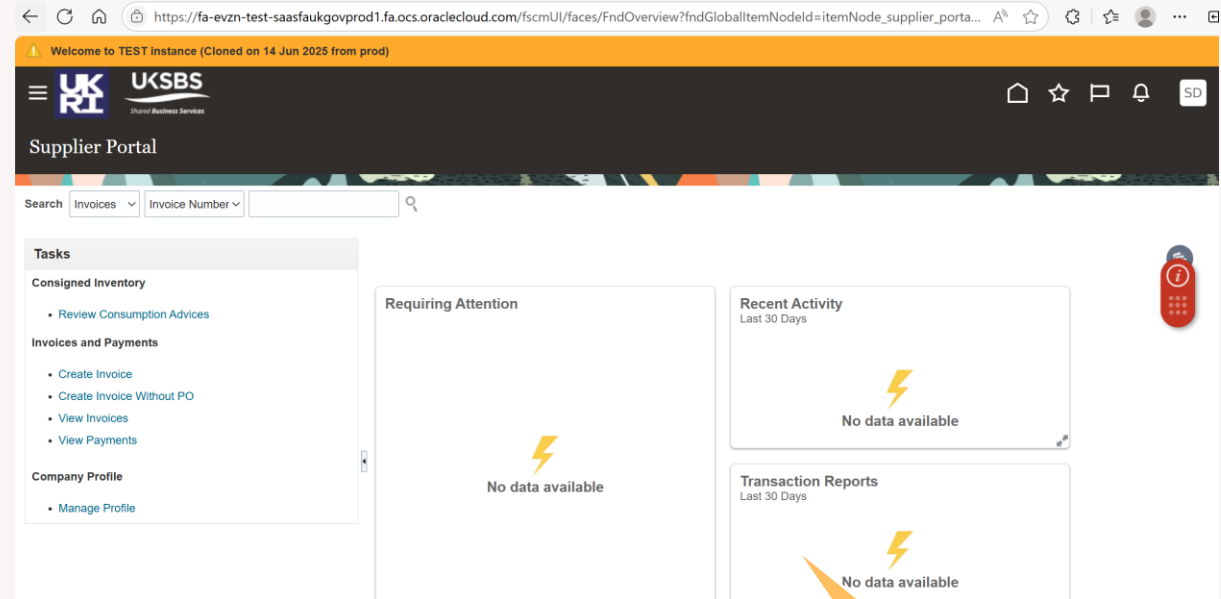
Resend Passcode

Verify

Show alternative login methods

4

Enter the one time passcode and select Verify



5

View Supplier Portal Dashboard

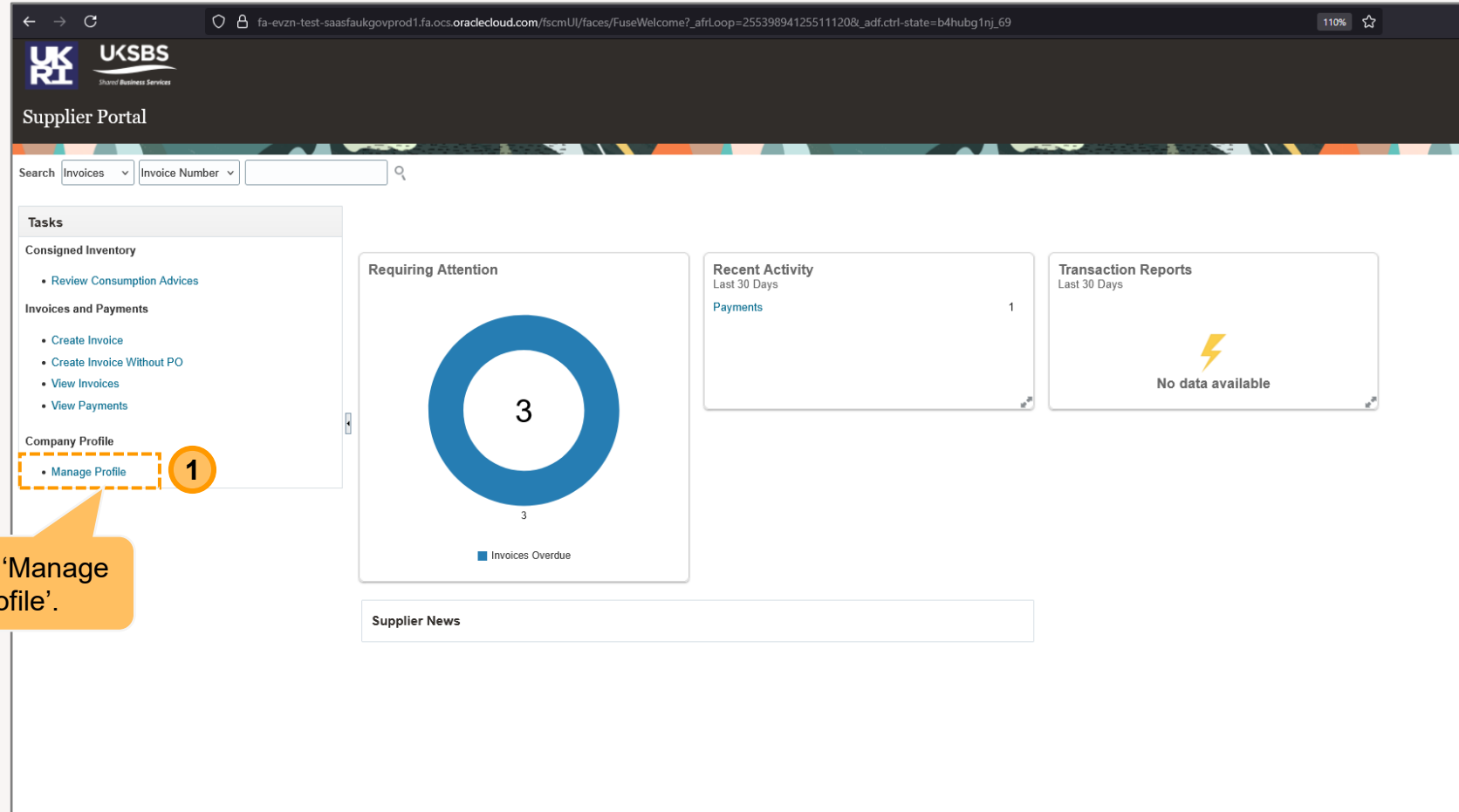
Topic 2: Manage company profile

Manage company profile

To manage your company profile:

1. Navigate to the Tasks panel on the Supplier portal page and select 'Manage Profile' under the Company Profile section.

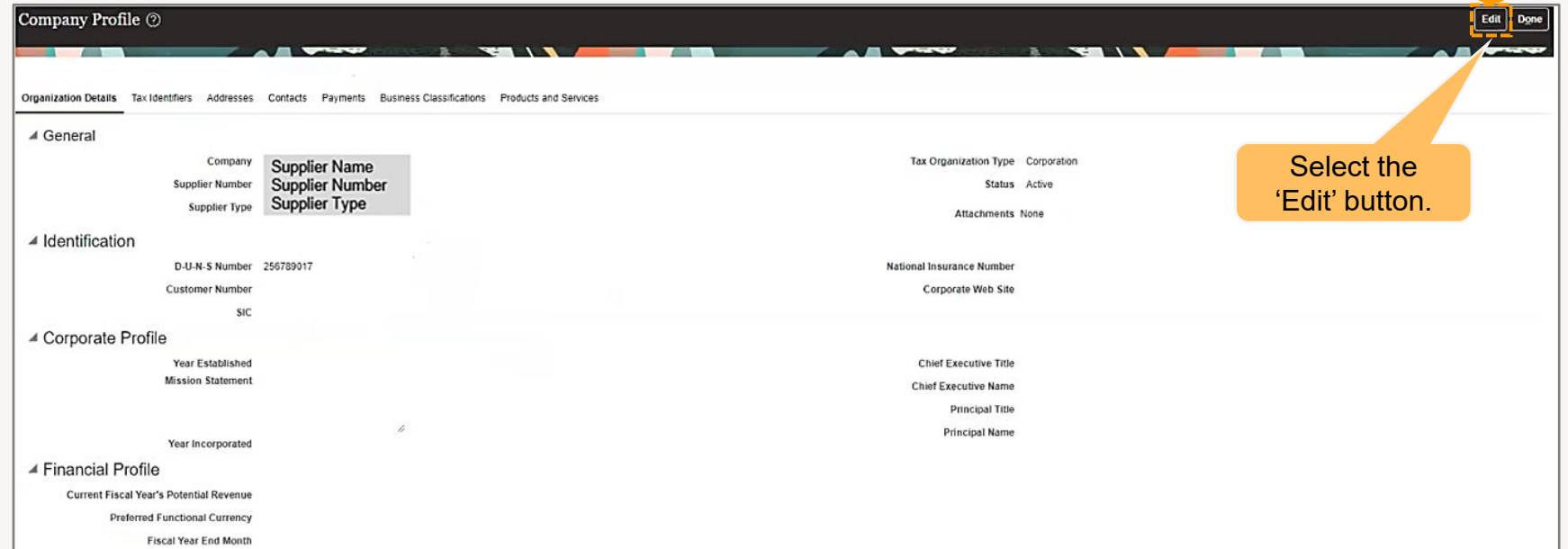
Select 'Manage Profile'.



Manage company profile (cont'd)

2. Select the 'Edit' button to update the supplier company profile.

3. A warning message will pop up. Select 'Yes' to confirm you want to continue.



The screenshot shows the 'Company Profile' form with a dark header bar. In the top right corner of the header, there are two buttons: 'Edit' and 'Done'. The 'Edit' button is highlighted with an orange circle containing the number '2'. A callout bubble points to the 'Edit' button with the text 'Select the 'Edit' button.' The form itself has a sidebar on the left with expandable sections: 'General', 'Identification', 'Corporate Profile', and 'Financial Profile'. The main area contains various fields for company information, including 'Supplier Name', 'Supplier Number', 'Supplier Type', 'Tax Organization Type', 'Status', 'Attachments', 'D-U-N-S Number', 'Customer Number', 'SIC', 'National Insurance Number', 'Corporate Web Site', 'Chief Executive Title', 'Chief Executive Name', 'Principal Title', 'Principal Name', 'Year Established', 'Mission Statement', 'Year Incorporated', 'Current Fiscal Year's Potential Revenue', 'Preferred Functional Currency', and 'Fiscal Year End Month'.



The screenshot shows a warning dialog box with a yellow warning icon and the text 'Warning'. The message reads: 'POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?'. There are two buttons at the bottom: 'Yes' and 'No'. The 'Yes' button is highlighted with an orange circle containing the number '3'. A callout bubble points to the 'Yes' button with the text 'Select 'Yes' to continue.'

Manage company profile (cont'd)

4. Select the tab based on the data that you want to update.

5. Enter the required details as per business need.

6. Once the changes are made, enter the 'Change Description' to explain the purpose of the change.

7. Select 'Save'.

8. You can now review the changes made on the supplier profile by selecting 'Review Changes'.

The screenshot shows the Oracle 'Edit Profile Change Request' interface for request 14002. The interface includes a top navigation bar with tabs: Organization Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, and Products and Services. The 'Organization Details' tab is selected. Below the tabs, there are sections for General, Identification, and Corporate Profile. The 'General' section contains fields for Supplier Name, Supplier Number, Supplier Type, Tax Organization Type (set to Corporation), Status (set to Active), and Attachments. The 'Identification' section contains fields for D-U-N-S Number (123456785), Customer Number, and SIC. The 'Corporate Profile' section contains fields for Year Established, Mission Statement, Chief Executive Title, Chief Executive Name, and Principal Title. A 'Change Description' field is located above the tabs. The top right of the interface has buttons: Delete Change Request, Review Changes, Save, Save and Close, and Cancel. Numbered callouts (4-8) point to specific elements: 4 points to the 'Organization Details' tab; 5 points to the 'Supplier Name' field; 6 points to the 'Change Description' field; 7 points to the 'Save' button; and 8 points to the 'Review Changes' button.

ORACLE
Edit Profile Change Request: 14002

Delete Change Request Review Changes Save Save and Close Cancel

Enter the 'Change Description'.

Select 'Review Changes'.

Select the tab that you want to update.

Change Description

Select 'Save'.

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

General

Supplier Name Supplier Name
Supplier Number Supplier Number
Supplier Type Supplier Type

Tax Organization Type Corporation
Status Active
Attachments None

Identification

D-U-N-S Number 123456785
Customer Number
SIC

Corporate Profile

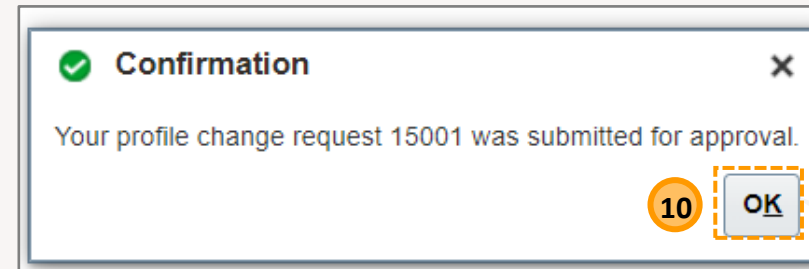
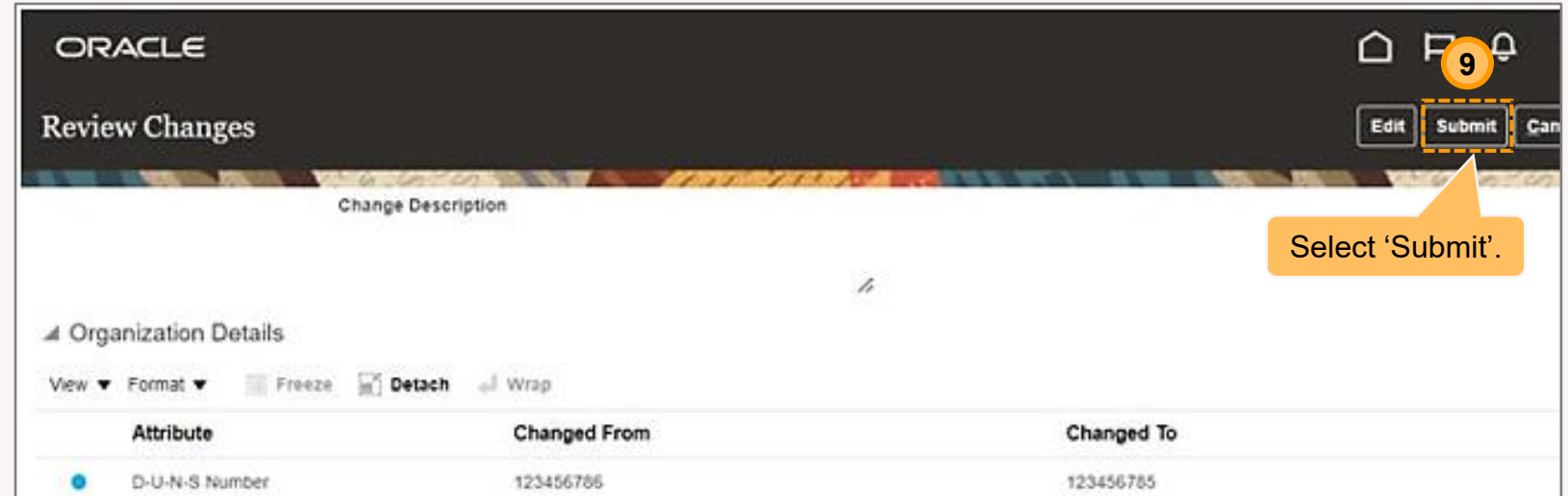
Year Established
Mission Statement
Chief Executive Title
Chief Executive Name
Principal Title

Manage company profile (cont'd)

9. Select 'Submit' to submit the change request.

This will trigger a notification to the approver to review and take the appropriate action. Once the request is approved, the changes are reflected in the Oracle Fusion application.

10. A confirmation message will be displayed. Select 'OK' to close it.



Topic 3: Manage bank details

Manage bank details

To manage your bank details:

1. Navigate to the Tasks panel on the Supplier Portal page and select 'Manage Profile' under the Company Profile section.

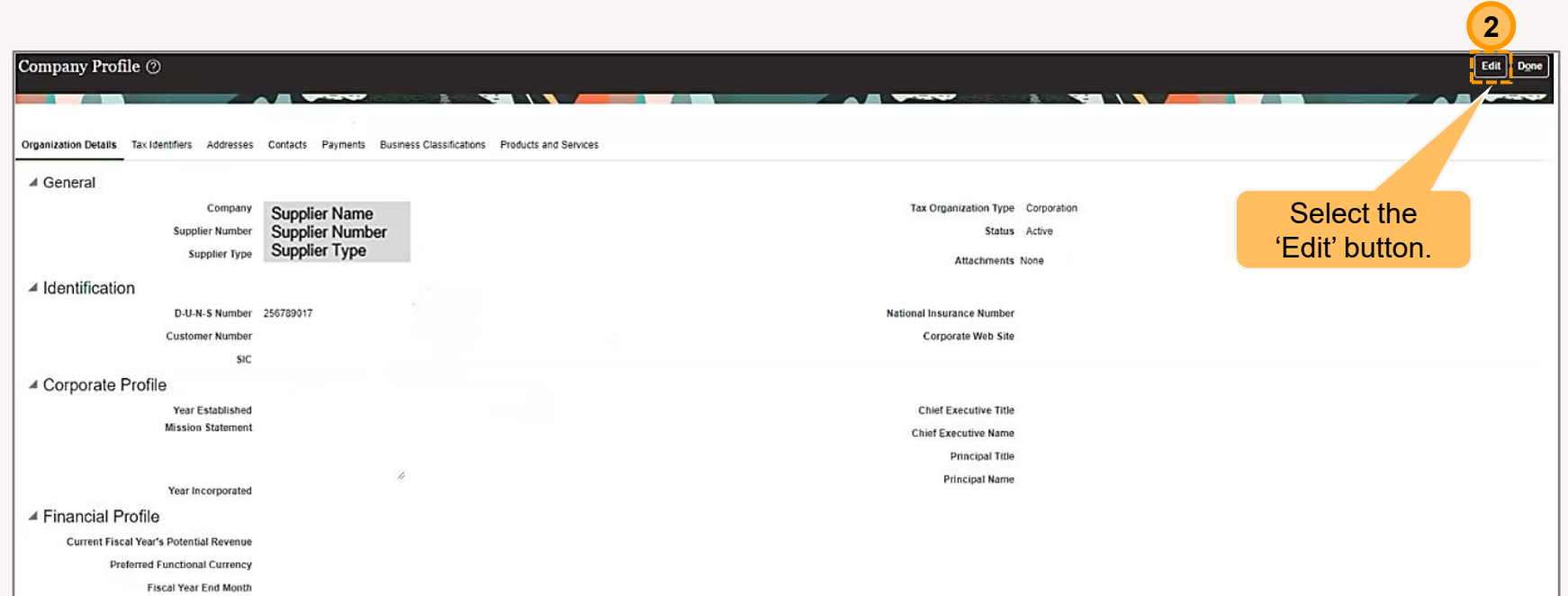
Select 'Manage Profile'.

The screenshot displays the UKSBS Supplier Portal interface. The top navigation bar includes the UKRI and UKSBS logos, the text 'Shared Business Services', and the title 'Supplier Portal'. Below the navigation bar is a search bar with a dropdown menu set to 'Invoices' and an 'Invoice Number' field. The main content area is divided into several sections. On the left, a 'Tasks' panel is visible, containing three main categories: 'Consigned Inventory' (with a link to 'Review Consumption Advices'), 'Invoices and Payments' (with links to 'Create Invoice', 'Create Invoice Without PO', 'View Invoices', and 'View Payments'), and 'Company Profile' (with a link to 'Manage Profile'). The 'Manage Profile' link is highlighted with a dashed orange box and a yellow circle containing the number '1'. An orange callout bubble points to this link with the text 'Select 'Manage Profile''. The main content area also features a 'Requiring Attention' section with a large blue donut chart showing '3' and a legend for 'Invoices Overdue'. To the right of this are two sections: 'Recent Activity' (Last 30 Days) showing '1' payment, and 'Transaction Reports' (Last 30 Days) showing 'No data available' with a lightning bolt icon. At the bottom, there is a 'Supplier News' section.

Manage bank details (cont'd)

2. Select the 'Edit' button to update the bank details.

3. A warning message will pop up. Select 'Yes' to confirm you want to continue.



The screenshot shows the 'Company Profile' form with various tabs and sections. The 'Edit' button is highlighted with a red circle and a callout box that says 'Select the 'Edit' button.' The form includes sections for General, Identification, Corporate Profile, and Financial Profile, each with specific fields for company information.

Company Profile

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

General

Company
Supplier Number
Supplier Type

Supplier Name
Supplier Number
Supplier Type

Tax Organization Type: Corporation
Status: Active
Attachments: None

Identification

D-U-N-S Number: 256789017
Customer Number
SIC

Corporate Profile

Year Established
Mission Statement

Chief Executive Title
Chief Executive Name
Principal Title
Principal Name

Financial Profile

Year Incorporated
Current Fiscal Year's Potential Revenue
Preferred Functional Currency
Fiscal Year End Month



A warning dialog box is displayed with a yellow warning icon. The text reads: 'POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?'. The 'Yes' button is highlighted with a red circle and a callout box that says 'Select 'Yes' to continue.' The 'No' button is also visible.

Warning

POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?

Yes No

Manage bank details (cont'd)

4. Select the 'Payments' tab.

5. Under the Payments section, select 'Bank Accounts' to add the bank details.

6. Select the plus '+' icon in the Bank Accounts section.

The screenshot shows the 'Edit Profile Change Request: 13001' interface. At the top right, there are buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. Below the header, there are several tabs: 'Organization Details', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Payments' tab is selected and highlighted with a dashed orange box and a callout bubble labeled '4' that says 'Select the 'Payments' tab.' Below the tabs, there is a section for 'Payment Methods' with a sub-tab 'Bank Accounts' highlighted by a dashed orange box and a callout bubble labeled '5' that says 'Select 'Bank Accounts''. Below 'Bank Accounts', there is a table with columns 'Primary', 'Account Number', 'IBAN', 'Currency', and 'Bank Name'. A plus '+' icon is located next to the 'Account Number' header, highlighted by a dashed orange box and a callout bubble labeled '6' that says 'Select the plus '+' icon.' The table currently shows 'No data to display.' and 'Columns Hidden: 8'. Above the table, there are icons for 'Freeze' and 'Wrap'.

Manage bank details (cont'd)

7. Select the 'Bank Name' and 'Bank Branch' from the drop-down. Populate the 'Currency' and 'Account Number' fields as mandatory and other fields as per business need.

8. Once all the details are entered, select OK.

Note: Foreign suppliers will need to add the IBAN, or SWIFT/BIC code. If it is a US supplier, the Routing Number needs to be added, otherwise the payment will not reach them.

The screenshot shows the 'Edit Profile Change Request: 13001' interface. A 'Create Bank Account' dialog box is open, containing the following fields:

- Country: United Kingdom
- Account Number: [Empty]
- Bank Name: [Empty]
- Bank Branch: [Empty]
- From Date: 24/03/2025
- Inactive On: dd/mm/yyyy
- IBAN: [Empty]
- Currency: GBP
- ☐ Allow international payments
- ☒ Additional Information
 - Account Name: [Empty]
 - Alternate Account Name: [Empty]
 - Account Suffix: [Empty]
- Check Digits: [Empty]
- Account Type: [Empty]
- Description: [Empty]

The 'OK' button is highlighted with a dashed orange border.

Populate the mandatory fields and the other fields as per business need.

Select 'OK'.

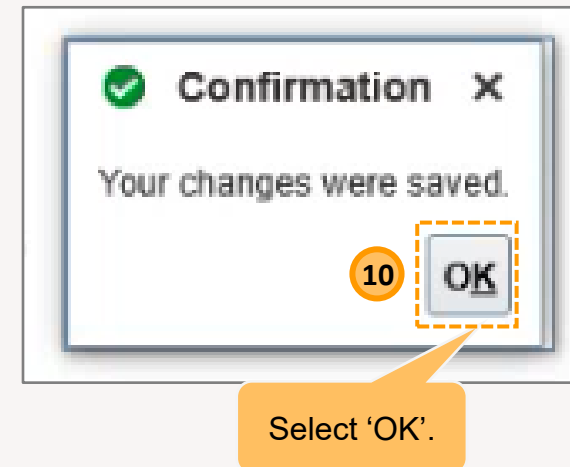
Manage bank details (cont'd)

9. Select 'Save and Close' to submit the details.

10. A confirmation message will appear. Select 'OK' to close it.

Note: If a bank or branch is not there, contact P2PDatabaseManagement@uksbs.co.uk.

The screenshot shows the 'Edit Profile Change Request: 13001' form. At the top right, there are buttons: 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close' (highlighted with a yellow circle and number 9), and 'Cancel'. Below these is a 'Change Description' text area. The main content area has tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments' (selected), 'Business Classifications', and 'Products and Services'. Under the 'Payments' tab, there are sub-tabs for 'Payment Methods' and 'Bank Accounts'. The 'Bank Accounts' sub-tab is active, showing a table with columns: 'Primary', 'Account Number', 'IBAN', 'Currency', and 'Bank Name'. The first row has a green checkmark in the 'Primary' column, a greyed-out 'Account Number', a greyed-out 'IBAN', 'GBP' in the 'Currency' column, and a greyed-out 'Bank Name'. Below the table, it says 'Columns Hidden: 8'. An orange callout bubble points to the 'Save and Close' button with the text 'Select 'Save and Close'.'



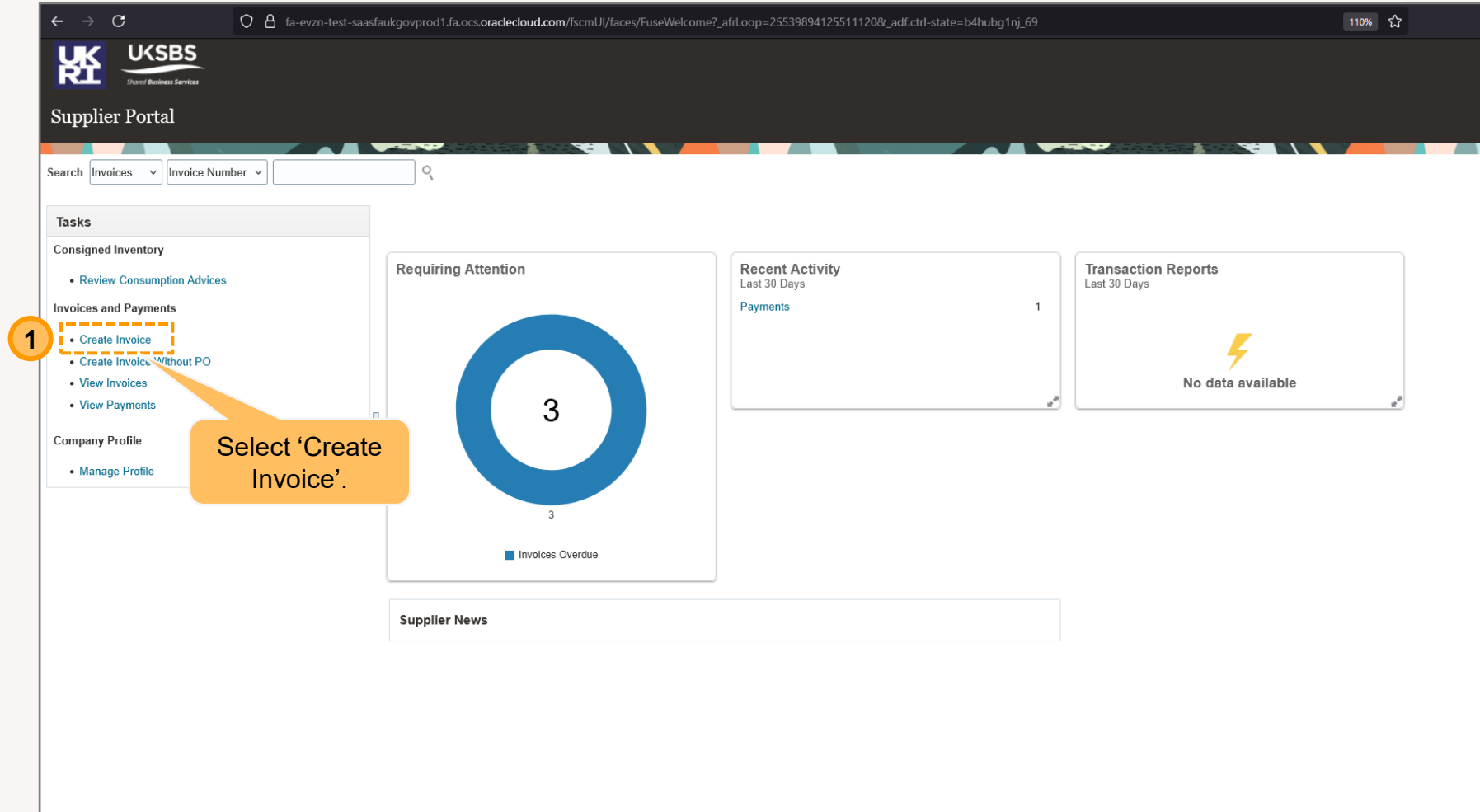
Topic 4: Create invoices

Create invoices

To create an invoice:

1. Navigate to the Tasks panel on the Supplier Portal and select 'Create Invoice' under the Invoices and Payments section.

Note: UKRI and UKSBS operate a No PO No Pay policy and suppliers should not use the 'Create Invoice Without PO' function.



Create invoices (cont'd)

2. Search for an identifying purchase order (PO) using the drop-down arrow and select it.

The screenshot shows the 'Create Invoice' form. An orange dashed box highlights the 'Identifying PO' dropdown menu, which is currently set to 'UKR10000...'. An orange callout bubble points to this dropdown with the text 'Search for an 'Identifying PO''. The form includes various input fields for supplier and customer information, a table for invoice lines, and a summary tax section.

Create Invoice

Invoice Actions: Save, Save and Close, Submit, Cancel

Supplier Information:

- Identifying PO: (Annotated: Search for an 'Identifying PO'.)
- Supplier: Supplier Name:
- Taxpayer ID:
- * Supplier Site:
- Address:
- Supplier Tax Registration Number:

Customer Information:

- Customer Taxpayer ID:
- Name:
- Address:
- Bill to Site: ☐

Invoice Details:

- Remit to Bank Account:
- * Number:
- * Date:
- * Type:
- Invoice Currency:
- Payment Currency:

Lines

View: Cancel Line

* Number	* Type	Purchase Order		Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Ship-To Location	UOM	* Amount	Description
		* Number	* Line	* Schedule	Number	Line								
No data to display														
Total														

Summary Tax Lines

View:

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
No data to display								

Create invoices (cont'd)

3. The purchase order (PO) details will be auto-populated. Verify if this information is correct and enter any required additional information, including the invoice number, date and type of invoice.

You can also add an attachment to the invoice.

4. To add an attachment, select the plus '+' icon in the Attachments field.

The screenshot shows the 'Create Invoice' form with several fields and sections. An orange dashed box highlights the top section, and an orange circle with the number '4' points to the 'Attachments' field. A callout bubble points to the plus icon in the 'Attachments' field with the text 'Select the plus '+' icon.'.

Below the top section, there is a table with the following columns: * Number, * Type, * Date, * Invoice Currency, * Payment Currency, * Supplier Name, * Supplier Site, * Address, * Supplier Tax Registration Number, * Customer Taxpayer ID, * Taxpayer ID, * Bank Account Number, * Unique Remittance Identifier, * Unique Remittance Identifier Check Digit, * Description, * Attachments, * Tax Control Amount, * Name, * Address. The table is currently empty.

Below the table, there is a section for 'Summary Tax Lines' with a table that has the following columns: Line, * Regime, * Tax Name, Tax Jurisdiction, * Tax Status, * Rate Name, Percentage, Per Unit, Amount. The table is currently empty.

Annotations:

- 3: Verify the PO details and populate the required additional fields.
- 4: Select the plus '+' icon.

Create invoices (cont'd)

5. A pop-up window will appear. Select the 'Browse' button in the pop-up to browse for an attachment.

6. Once the attachment is added, select 'OK' to save it.

The screenshot shows the 'Attachments' pop-up window. It has a table with columns: Type, Category, File Name or URL, Title, Description, and Attached By. The 'Type' dropdown is set to 'File' and the 'Category' dropdown is set to 'From Supplier'. The 'File Name or URL' column shows 'No file selected.' and the 'Browse...' button is highlighted with a red box. A callout bubble labeled '5' points to the 'Browse...' button. The 'Attached By' field shows 'Shwan Miches'. The 'OK' and 'Cancel' buttons are at the bottom right.

Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	No file selected.			Shwan Miches

The screenshot shows the 'Attachments' pop-up window after a file has been added. The 'File Name or URL' column now shows 'Report_118910.pdf' and the 'Update...' button is visible. The 'Title' field contains 'Report_118910.pdf'. The 'Attached By' field shows 'Shwan Miches'. The 'OK' button is highlighted with a red box, and a callout bubble labeled '6' points to it. The 'Cancel' button is also visible.

Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	Report_118910.pdf	Report_118910.pdf		Shwan Miches

Create invoices (cont'd)

7. Under the Lines section, select the 'Select and Add' icon.

8. Select the relevant purchase order (PO) you want to add to the invoice.

Tip: You can view the purchase order by selecting the blue PO hyperlink.

9. Select 'Apply' and then, 'OK'.

The screenshot shows the 'Create Invoice' interface. A modal window titled 'Select and Add: Purchase Orders' is open. The modal has a search section with fields for 'Purchase Order' (set to UKR10000232) and 'Creation Date'. Below the search section is a table of search results. The first row is highlighted with a dashed orange box and labeled with a green circle '8'. The row contains the following data: Purchase Order Number UKR10000232, Line 1, Schedule 1, Consumption Advice Test Outbound, Supplier Item Number, Item Description, Ship-to Location Ship-To Address, and Ordered 5. A dashed orange box around the 'Ship-To Address' cell is labeled with a green circle '9'. The modal also has 'Apply', 'OK', and 'Cancel' buttons at the bottom right. In the background, the 'Create Invoice' form is visible, with a blue icon in the 'Lines' section labeled with a green circle '7'. The form includes fields for 'Identifying PO', 'Supplier Name', 'Taxpayer ID', 'Bank Account Number', 'Date', 'Type', 'Invoice Currency', and 'Payment Currency'. The 'Invoice Actions' bar at the top right contains 'Save', 'Save and Close', 'Submit', and 'Cancel' buttons.

Select the 'Select and Add' icon.

Select the PO you want to add.

Select 'Apply', then 'OK'.

Tip: You can view the Purchase Order by selecting the blue PO hyperlink.

Create invoices (cont'd)

10. The Line details will now show in the Lines section. Verify the details and edit, if required.

Note: When a supplier invoice is on hold, UKSBS need to release the hold to enable the invoice to proceed further

Create Invoice ②

Invoice Actions Save Save and Close Submit Cancel

Identifying POUKR10009232

SupplierSupplier Name

Taxpayer ID

Supplier SiteMain

Addresspolaris house, SWINDON, SN1

Supplier Tax Registration Number

Remit to Bank AccountBank Account Number

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

AttachmentsNone

Tax Control Amount

* NumberDEMO_1

* Date30/07/2024

TypeInvoice

Invoice CurrencyGBP - Pound Sterling

Payment CurrencyGBP - Pound Sterling

Customer

Customer Taxpayer ID4348296

10NameUK Research and Innovation

Address

Lines

View + x Cancel Line

* Number	* Type	Purchase Order		Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Description
		* Number	* Line	* Schedule	Number	Line									
1	Item	UKR100...	1	1			Test Outbound	Ship-To Address		3	3	100	Each	300.00	Test Outbound
Total														300.00	

Verify the Line details and edit, if required.

Create invoices (cont'd)

11. Select 'Invoice Actions' and then, select the 'Calculate Tax' option from the drop-down.

11

Create Invoice ?

Supplier Taxpayer ID **Supplier Name**

Supplier Site Main

Address polaris house, SWINDON, SN1

Supplier Tax Registration Number

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments None

Tax Control Amount

Customer Customer Taxpayer ID **Taxpayer ID**

Name UK Research and Innovation

Address

Invoice Actions Save Save and Close Submit Cancel

Calculate Tax Ctrl+Alt+X

Cancel Invoice

Delete Invoice

Invoice Currency GBP - Pound Sterling

Payment Currency GBP - Pound Sterling

Lines

View + - Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Description
1	Item	UKR100...	1	1		Test Outbound	Ship-To Address			2	100	Each	200.00	Test Outbound
Total													200.00	

Select 'Invoice Actions', then select 'Calculate Tax'.

Create invoices (cont'd)

12. The 'Summary Tax Lines' will now show the calculated tax. Check and amend, if required.

13. Once complete, select 'Submit'.

13

Select 'Submit'.

12

Check the tax calculated and amend, if required.

Create Invoice ?

Invoice Actions Save Save and Close Submit Cancel

Identifying PO UKR10009232

Supplier Supplier Name

Taxpayer ID

Supplier Site Main

Address polaris house, SWINDON, SN1

Supplier Tax Registration Number

Remit-to Bank Account Bank Account Number

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments None

Tax Control Amount

Number DEMO_1

Date 30/07/2024

Type

Invoice Currency

Payment Currency

Customer

Customer Taxpayer ID Taxpayer ID

Name UK Research and Innovation

Address

Lines

View Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Number	Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Description
1	Item	UKR100...	1	1				Test Outbound	Ship-To address			2	100	Each	200.00	Test Outbound
Total															200.00	

Summary Tax Lines

View

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
1	GB_VAT_REGIME	GB_VAT	GB_VAT	GB_STANDARD	GB_STANDA	20		40

Topic 5: Create credit note for purchase order (PO)

Create credit note for purchase order (PO)

To create a credit note for purchase Order (PO):

1. Navigate to the Tasks panel on the Supplier Portal and select 'Create Invoice' under the Invoices and Payments section.

The screenshot displays the UKSBS Supplier Portal interface. The 'Tasks' panel on the left contains three sections: 'Consigned Inventory' with a link to 'Review Consumption Advises'; 'Invoices and Payments' with links for 'Create Invoice' (highlighted with an orange box and a callout bubble saying 'Select 'Create Invoice''), 'Create Invoice Without PO', 'View Invoices', and 'View Payments'; and 'Company Profile' with a link to 'Manage Profile'. The main content area features a 'Requiring Attention' donut chart showing 3 'Invoices Overdue'. To the right, there are 'Recent Activity' and 'Transaction Reports' sections, both showing 1 item for the last 30 days. The 'Transaction Reports' section indicates 'No data available'.

Create credit note for purchase order (cont'd)

2. Search for an Identifying purchase order (PO) using the drop-down arrow and select it.

3. Enter any required additional information, including the invoice number and date.

4. Select the invoice type as 'Credit Memo'.

Tip: If you want to add an attachment to the credit memo, select the plus '+' icon in the Attachments field.

The screenshot shows the 'Create Invoice' form in the UKSBS system. It includes fields for Supplier, Customer, and various identifiers. Callout 2 points to the 'Identifying PO' dropdown menu. Callout 3 points to the 'Number' and 'Date' fields. Callout 4 points to the 'Type' dropdown menu, which is set to 'Credit memo'. A green tip box points to the '+' icon in the 'Attachments' field.

Search for an 'Identifying PO'.

Enter any required additional information.

Tip: Select the plus '+' icon in the Attachments field to add an attachment.

Select 'Credit Memo' as the invoice type.

* Number	* Type	* Number	* Line	* Schedule	Number	Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
No data to display.																
Total																

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
No data to display.								

Create credit note for purchase order (cont'd)

- 5. Under the Lines section, select the plus '+' icon.
- 6. Select a line type.
- 7. Select 'Save'.

Create Invoice ?

Invoice Actions

SaveSave and CloseSubmitCancel

Identifying POUKR10002129

SupplierSupplier Name

Taxpayer ID

Supplier Site

Address

Supplier Tax Registration Number

Customer Taxpayer ID

Remit to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

AttachmentsNone

Tax Control Amount

Name

AddressBill to Site

Number

* Date24/03/2025

TypeCredit memo

Invoice CurrencyGBP - Pound Sterling

Payment CurrencyGBP - Pound Sterling

5

+

×

Cancel Line

6

* Number	* Type	Purchase Order	Consumption Advice	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
		* Number	* Line	* Schedule	Number	Line							
1	Freight											-1 000.00	Credit Memo
Total												-1 000.00	

Summary Tax Lines

View

Line	* Regime	* Tax Name	Tax Jurisdiction	Tax Status	Rate Name	Percentage	Per Unit	Amount
No data to display.								

Select the plus '+' icon.

Select a line type.

Select 'Save'.

Create credit note for purchase order (cont'd)

8. Select 'Invoice Actions' and then, select the 'Calculate Tax' option from the drop-down.

8

Invoice Actions

Calculate Tax
Cancel Invoice
Delete Invoice

Save

Save and Close

Submit

Cancel

Create Invoice

Identifying PO UKR10002129

Supplier Supplier Name

Taxpayer ID

Supplier Site

Address

Supplier Tax Registration Number

Remit to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments None

Tax Control Amount

Customer

Customer Taxpayer ID

Name

Address Bill to Site

Lines

View

Cancel Line

* Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
		* Number	* Line	* Schedule	Number	Line										
1	Freight														-1 000.00	Credit Memo
Total															-1 000.00	

Summary Tax Lines

View

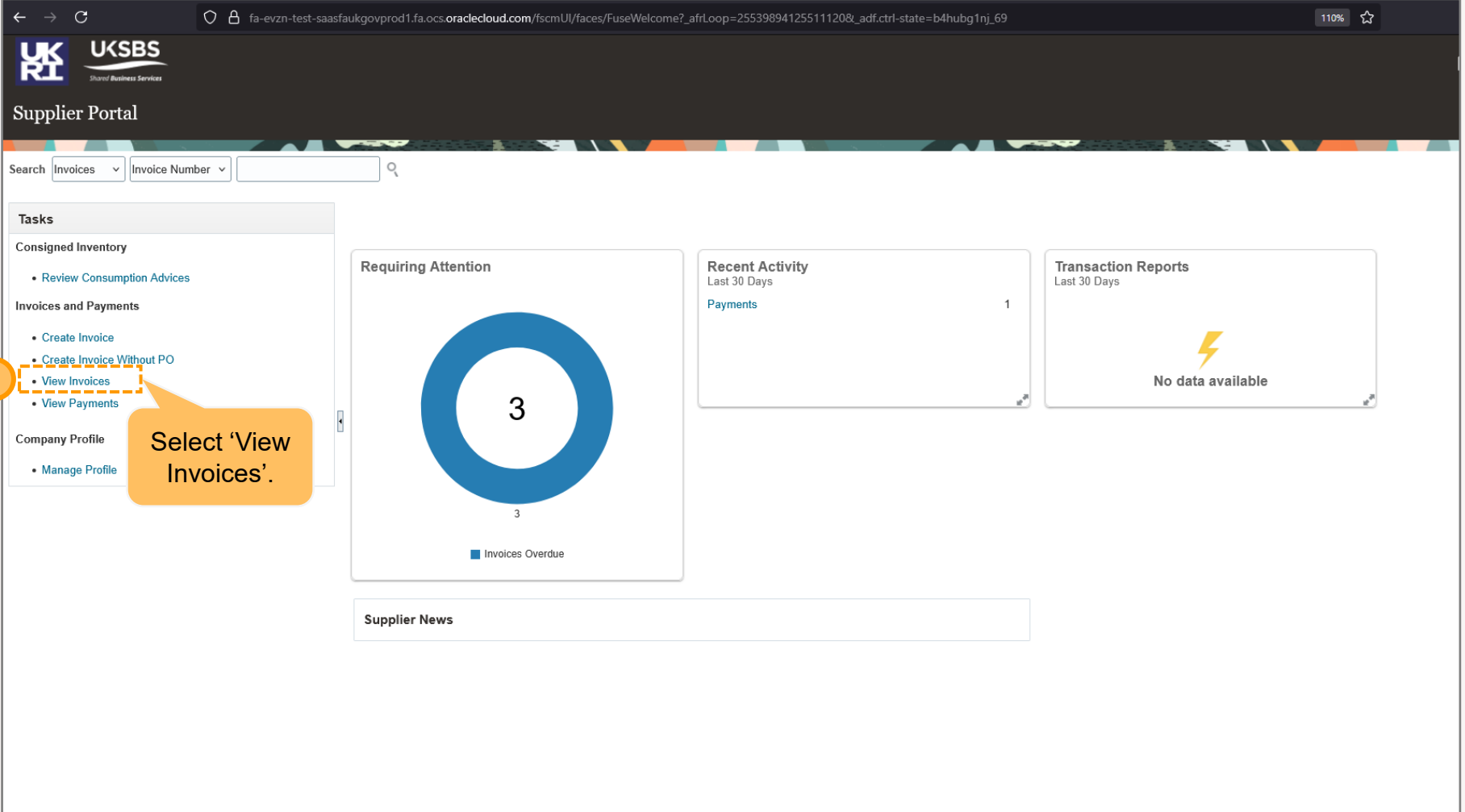
Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
No data to display.								

Topic 6: View invoices

View invoices

To view an existing invoice, log in to the Supplier Portal:

1. From the Tasks panel, select the 'View Invoices' option under the Invoices and Payments section.



The screenshot displays the UKSBS Supplier Portal interface. The browser address bar shows the URL: `fa-evzn-test-saasfaukgovprod1.fa.ocs.oraclecloud.com/fscmUI/faces/FuseWelcome?_afLoop=255398941255111208&_adf.ctrl-state=b4hubg1nj_69`. The page header includes the UKRI and UKSBS logos, with the text "Shared Business Services" and "Supplier Portal". Below the header is a search bar with a dropdown menu set to "Invoices" and a search icon. The main content area is divided into several sections:

- Tasks**: A sidebar on the left containing the following links:
 - Consigned Inventory
 - Review Consumption Advises
 - Invoices and Payments
 - Create Invoice
 - Create Invoice Without PO
 - View Invoices** (highlighted with an orange box and a callout bubble saying "Select 'View Invoices'")
 - View Payments
 - Company Profile
 - Manage Profile
- Requiring Attention**: A large blue donut chart showing 3 invoices overdue, with a legend indicating "Invoices Overdue".
- Recent Activity**: A box showing "Last 30 Days" with a count of 1 for "Payments".
- Transaction Reports**: A box showing "Last 30 Days" with a lightning bolt icon and the text "No data available".
- Supplier News**: A section at the bottom of the page.

View invoices (cont'd)

2. Enter the search criteria, such as, the supplier's name or the purchase order (PO).

3. Select 'Search'.

4. The created invoices will show up in the 'Search Results'. Select the 'Invoice Number' to view the invoice.

Note: You can check for duplicate invoices in the Search Results by filtering by invoice number.

Enter the search criteria.

2

3

Select 'Search'.

4

Select the 'Invoice Number' to view the invoice.

The screenshot shows the 'View Invoices' web application. At the top, there's a 'Search' section with input fields for 'Invoice Number', 'Supplier' (with a dropdown menu showing 'Supplier Name'), 'Supplier Site', and 'Purchase Order'. To the right of these fields are additional filters: 'Consumption Advice', 'Invoice Status', 'Paid Status', and 'Payment Number'. Below the search fields is a 'Search Results' section with a table. The table has columns: 'Invoice Number', 'Invoice Date', 'Type', 'Purchase Order', 'Supplier', 'Supplier Site', 'Unpaid Amount', 'Invoice Amount', 'Invoice Status', 'Payment Number', and 'Comments'. Two rows are visible: 'DEMO_1' and 'DEMO_2', both dated '30/07/2024' and of type 'Standard'. The 'Supplier' column for both rows shows 'Supplier Name'. The 'Invoice Status' for both is 'On hold'. The 'Payment Number' is blank. The 'Unpaid Amount' is '240.00 GBP' and the 'Invoice Amount' is '240.00 GBP'. The 'Search' button is highlighted with a red box and the number 3. The 'Supplier Name' dropdown is highlighted with a red box and the number 2. The 'Invoice Number' column header is highlighted with a red box and the number 4. A red box with the number 3 is also around the 'Search' button. A red box with the number 4 is around the 'Supplier Name' dropdown.

Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Payment Number	Comments
DEMO_1	30/07/2024	Standard	UKR10000232	Supplier Name	Main	240.00 GBP	240.00 GBP	On hold		
DEMO_2	30/07/2024	Standard	UKR10000232	Supplier Name	Main	240.00 GBP	240.00 GBP	On hold		

Topic 7: View payments

View payments

To view supplier payments, log in to the Supplier Portal:

1. From the Tasks panel, select the 'View Payments' option under the Invoices and Payments section.

The screenshot shows the UKRI UKSBS Supplier Portal interface. The browser address bar displays the URL: `fa-evzn-test-saasfaukgovprod1.fa.ocs.oraclecloud.com/fscmUI/faces/FuseWelcome?_afzLoop=25539894125511120&_adf.ctrl-state=b4hubg1nj_69`. The page header includes the UKRI and UKSBS logos, with the text "Shared Business Services" and "Supplier Portal".

The main content area is divided into several sections:

- Search:** Includes dropdowns for "Invoices" and "Invoice Number", and a search input field.
- Tasks:** A sidebar menu with the following sections:
 - Consigned Inventory:** Includes a link for "Review Consumption Advices".
 - Invoices and Payments:** Includes links for "Create Invoice", "Create Invoice Without PO", "View Invoices", and "View Payments" (highlighted with an orange box and a callout bubble that says "Select 'View Payments'").
 - Company Profile:** Includes a link for "Manage Profile".
- Requiring Attention:** A donut chart showing 3 invoices overdue. A legend indicates "Invoices Overdue".
- Recent Activity:** A section titled "Recent Activity Last 30 Days" showing 1 payment.
- Transaction Reports:** A section titled "Transaction Reports Last 30 Days" showing "No data available" with a lightning bolt icon.
- Supplier News:** A section at the bottom of the page.

View payments (cont'd)

2. Enter the supplier's name.
3. Select 'Search'.
4. Any payments made will show up in the 'Search Results'.

The screenshot shows the 'View Payments' interface. At the top, there's a 'Search' section with input fields for 'Payment Number', 'Payment Status' (a dropdown), and 'Payment Amount'. To the right of these is a 'Supplier' section with a dropdown for 'Supplier Site' and a table for 'Supplier Name' and 'Supplier Site'. The table has two rows, both with '1000001' in the 'Supplier Site' column. Below the table is a 'Search...' button. A 'Search Results' section is at the bottom, containing a table with columns: 'Payment Number', 'Payment Date', 'Payment Type', 'Invoice Number', 'Supplier', 'Supplier Site', 'Payment Amount', 'Payment Status', and 'Remit-to Account'. The table is currently empty, with the text 'No search conducted.' at the bottom. Three numbered callouts are present: 2 points to the 'Supplier Name' input field, 3 points to the 'Search' button, and 4 points to the 'Search Results' table.

2 Enter the supplier's name.

3 Select 'Search'.

4 Payments will show up in 'Search Results'.

Thank You