Guide to
Supplier Portal

How to guide for suppliers

Contents

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.

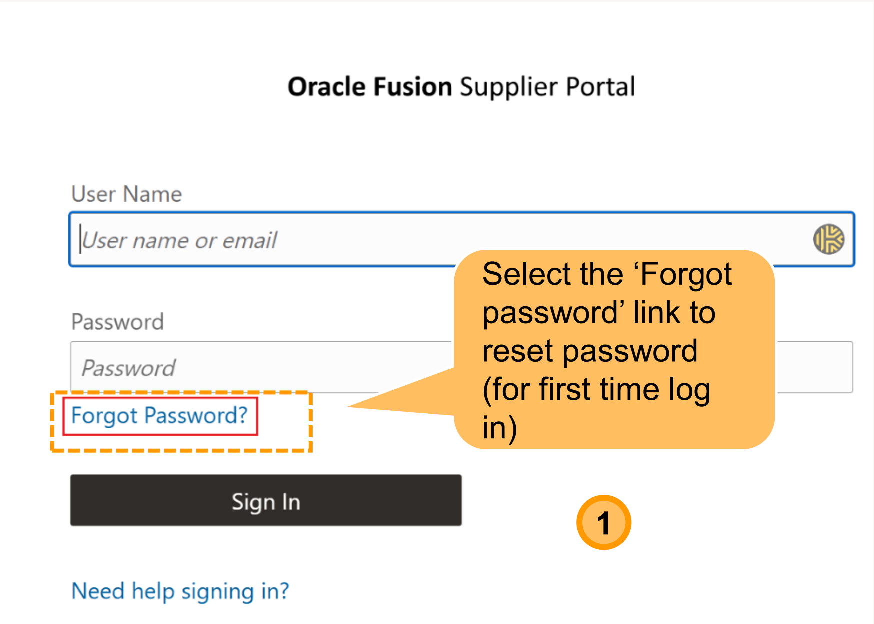
1. Update the company profile of the supplier through supplier portal
2. Update the bank details of the supplier through supplier portal
3. Create invoices linked to purchase orders
4. Generate credit notes when required
5. Access invoices and payments in the supplier portal

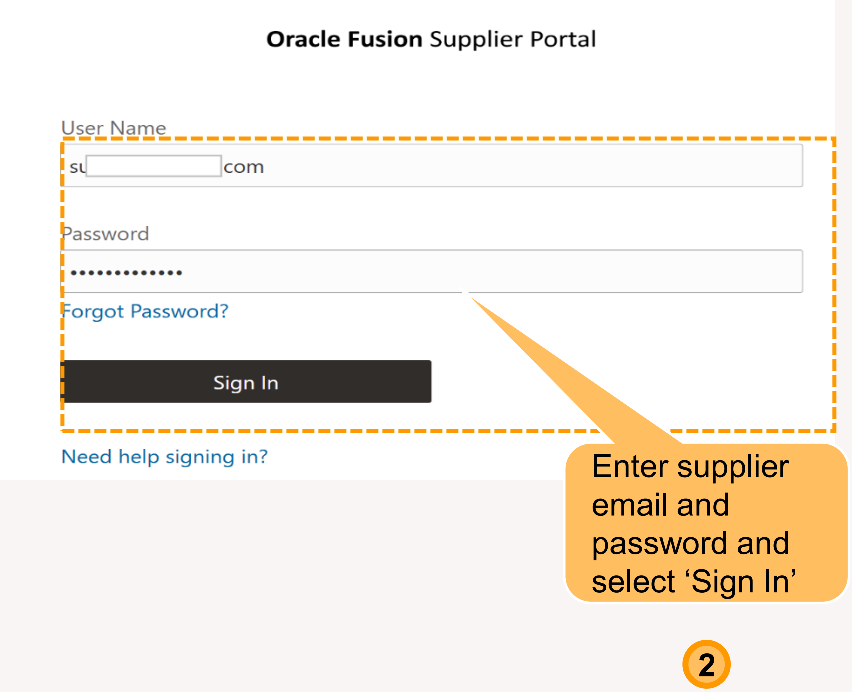
Topic 1: Supplier portal login

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).

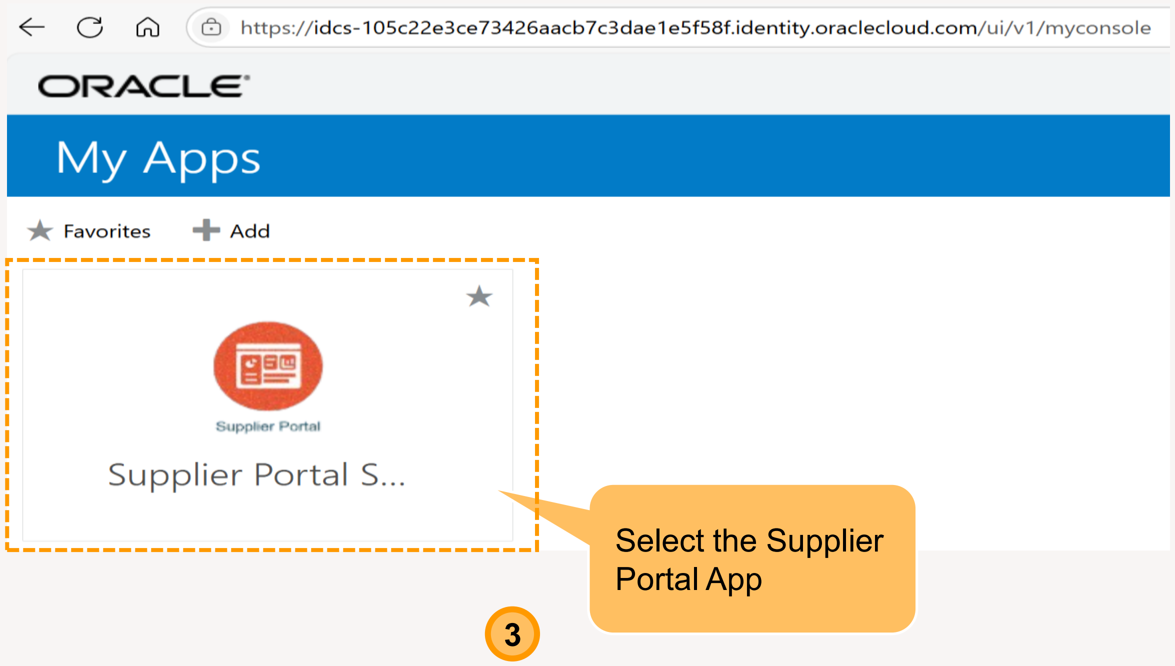




2. If not a first-time login, enter supplier email and password and click 'Sign in'

Supplier portal login (cont'd)

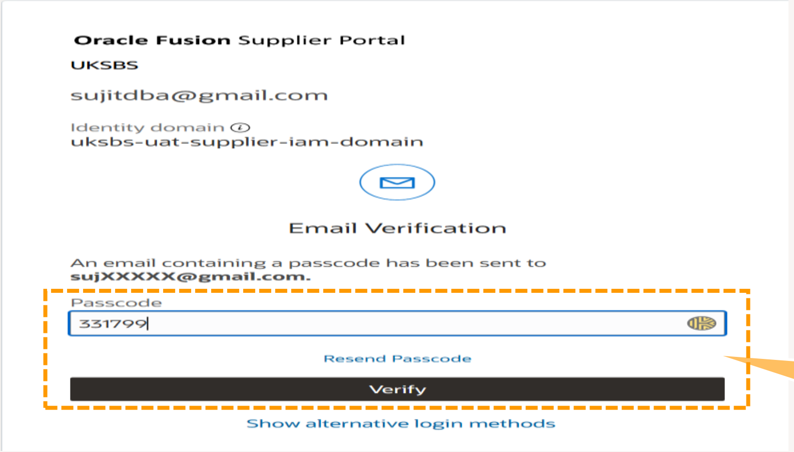
3. Suppliers are redirected to the following page post log in. Select the Supplier Portal app from the My Apps page



Supplier portal login (cont'd)

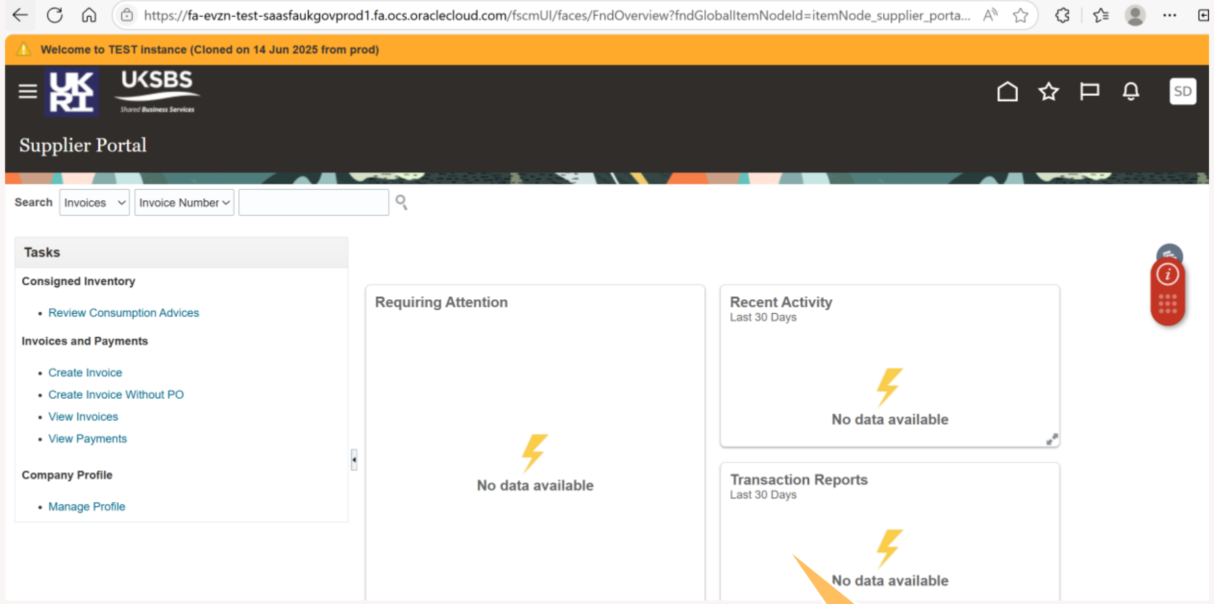
4. On the multifactor authenticator screen, enter the one-time passcode that is sent to the registered supplier email and select 'Verify'.

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



4

Enter the one time passcode and select Verify



View Supplier Portal Dashboard

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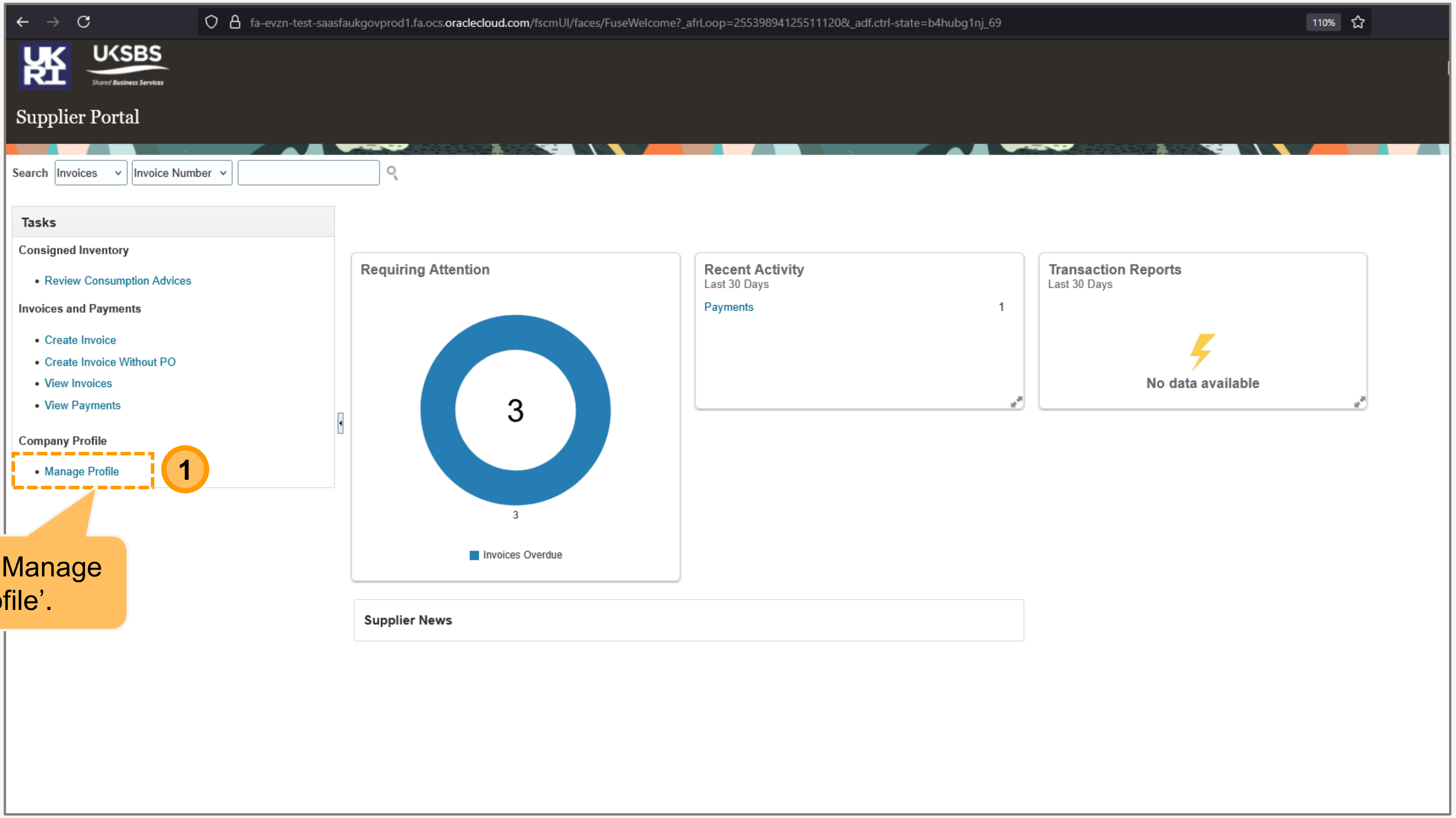
Topic 2: Manage company profile

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.

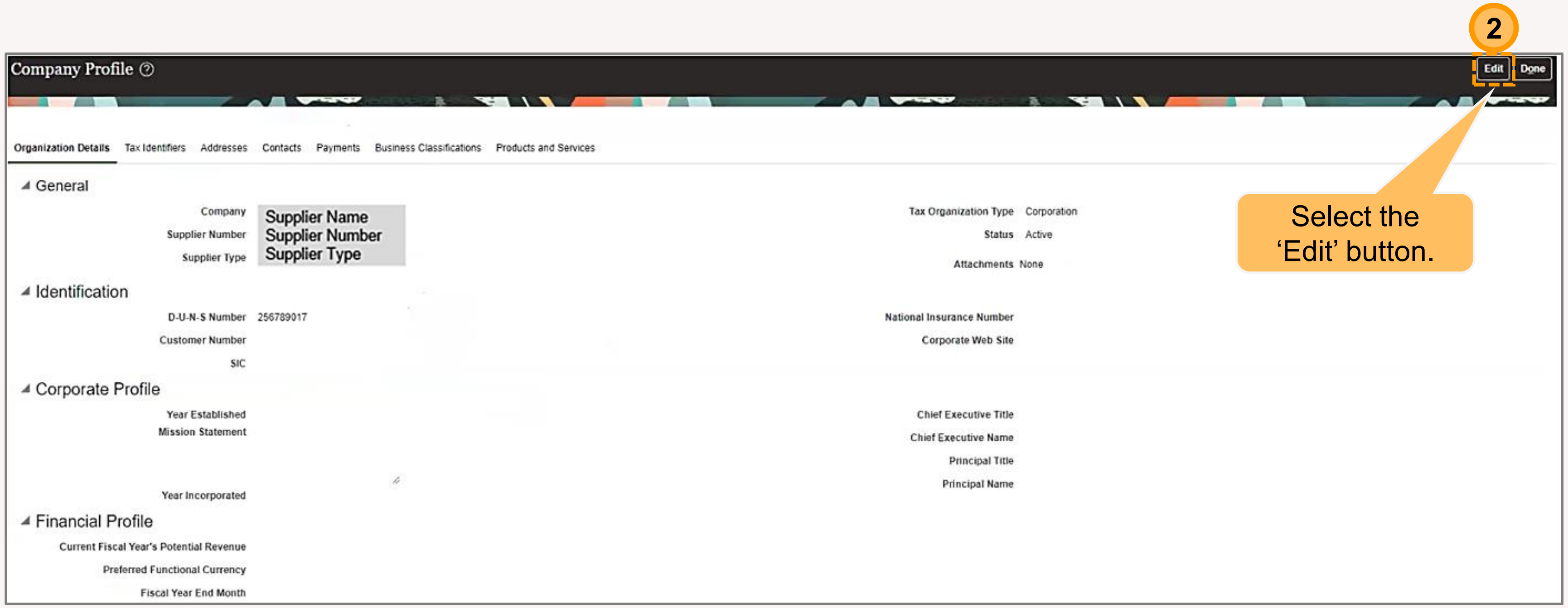


Select ‘Manage Profile’.

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.



Manage company profile (cont'd)

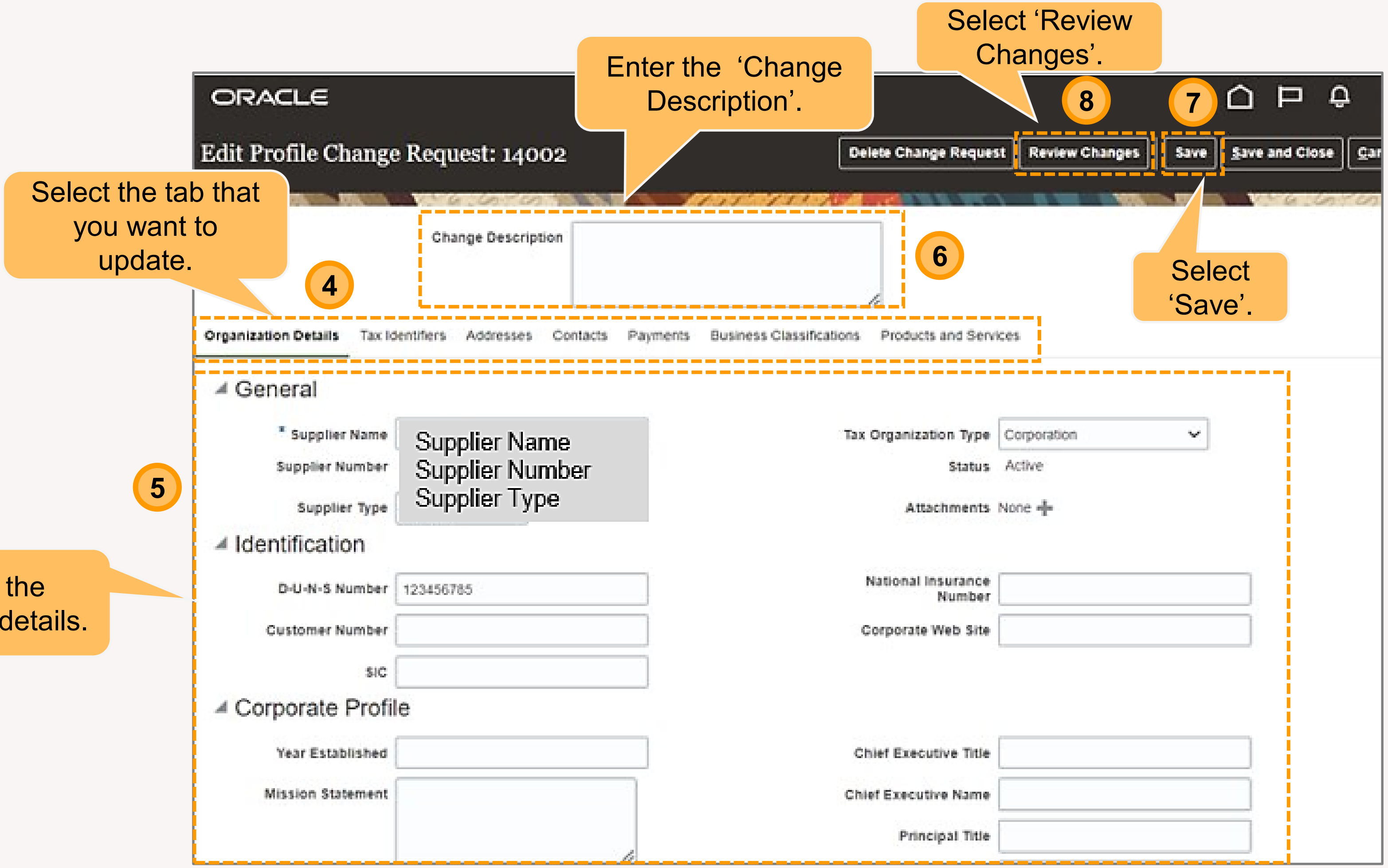
4. Select the tab based on the data that you want to update.

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'.

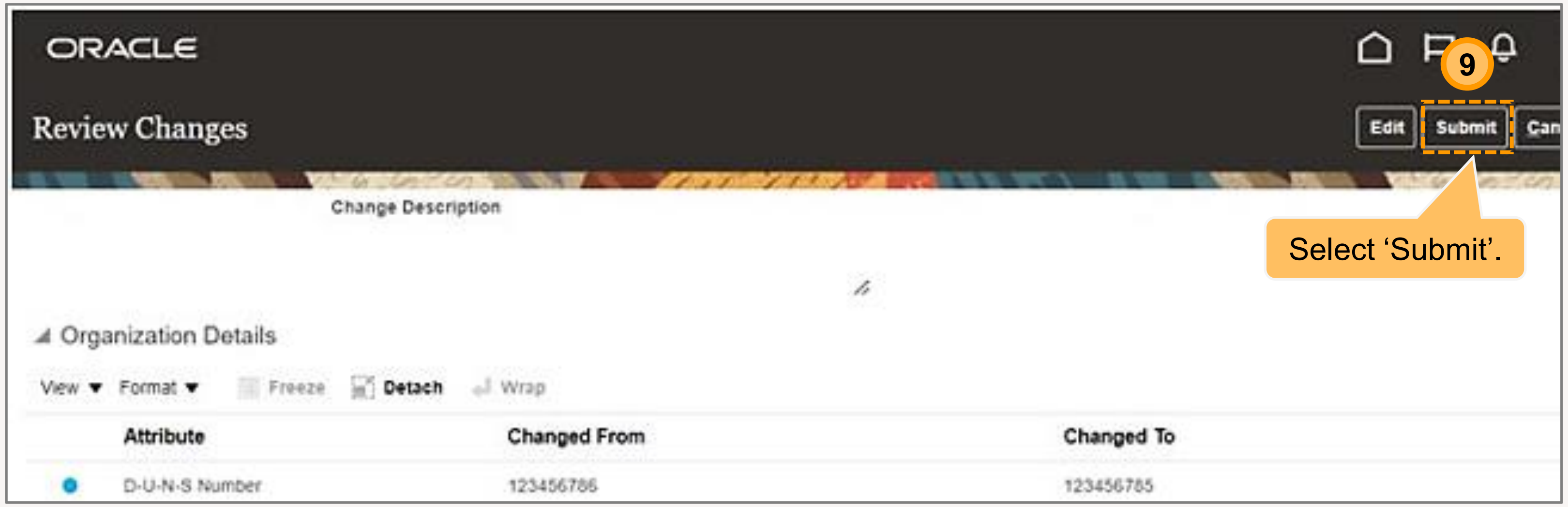


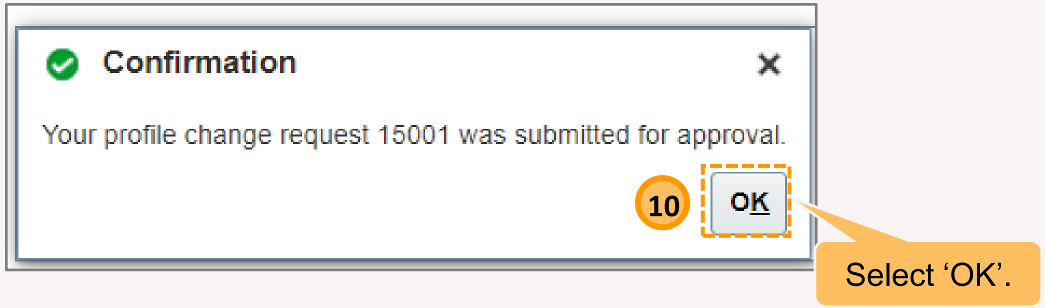
Manage company profile (cont'd)

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.



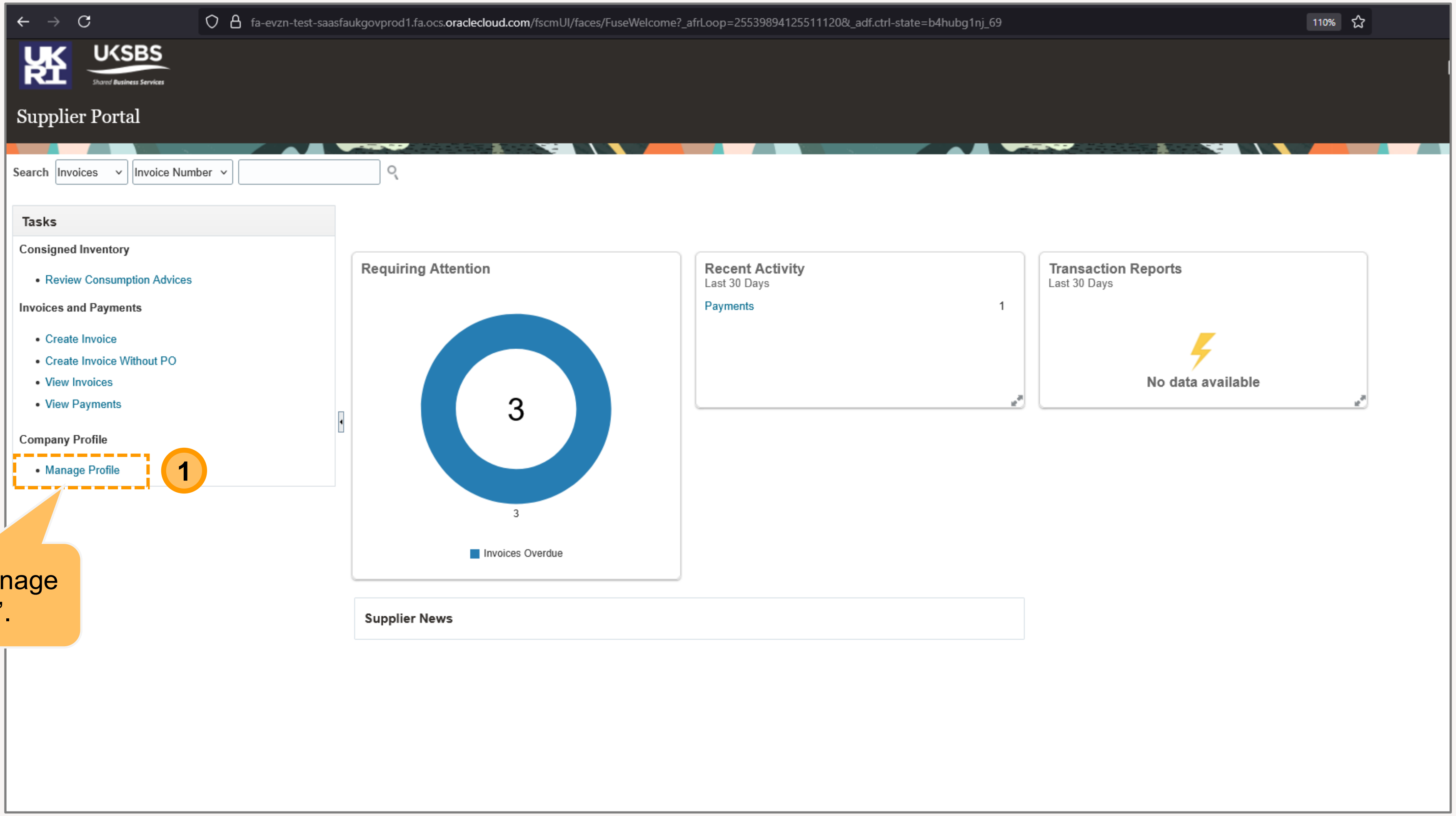


Topic 3: Manage bank details

Manage bank details

To manage your bank details:

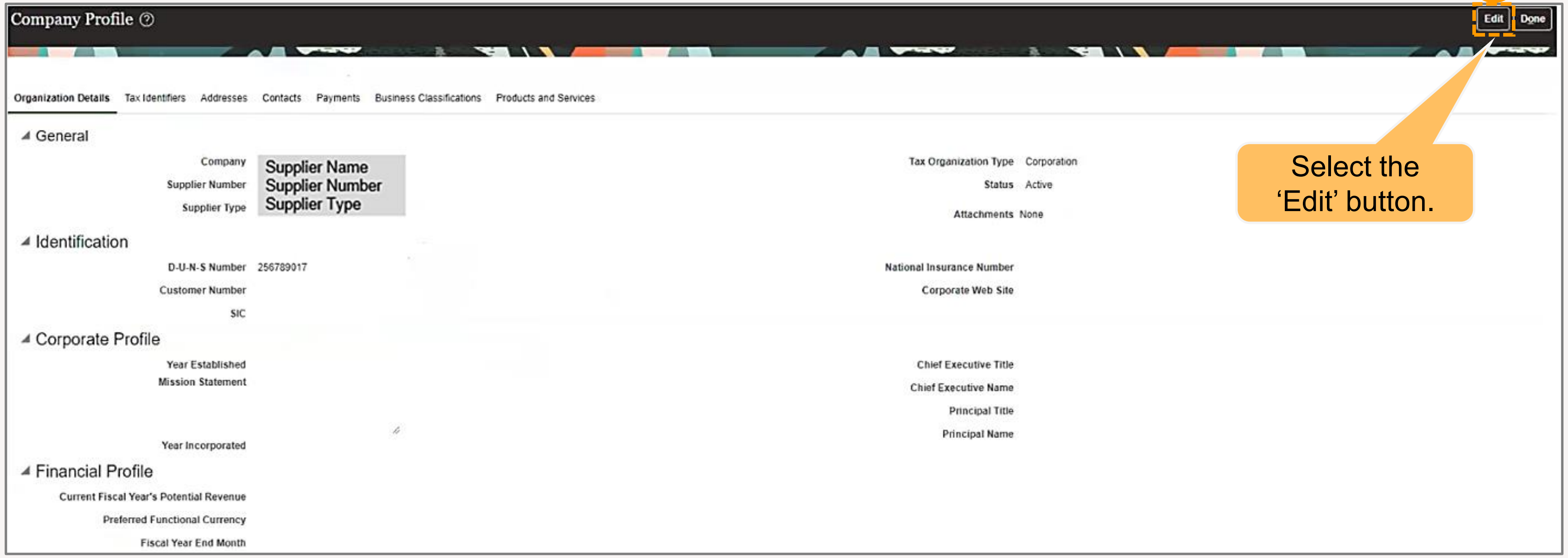
1. Navigate to the Tasks panel on the Supplier Portal page and select ‘Manage Profile’ under the Company Profile section.



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.



2

Select the 'Edit' button.

3

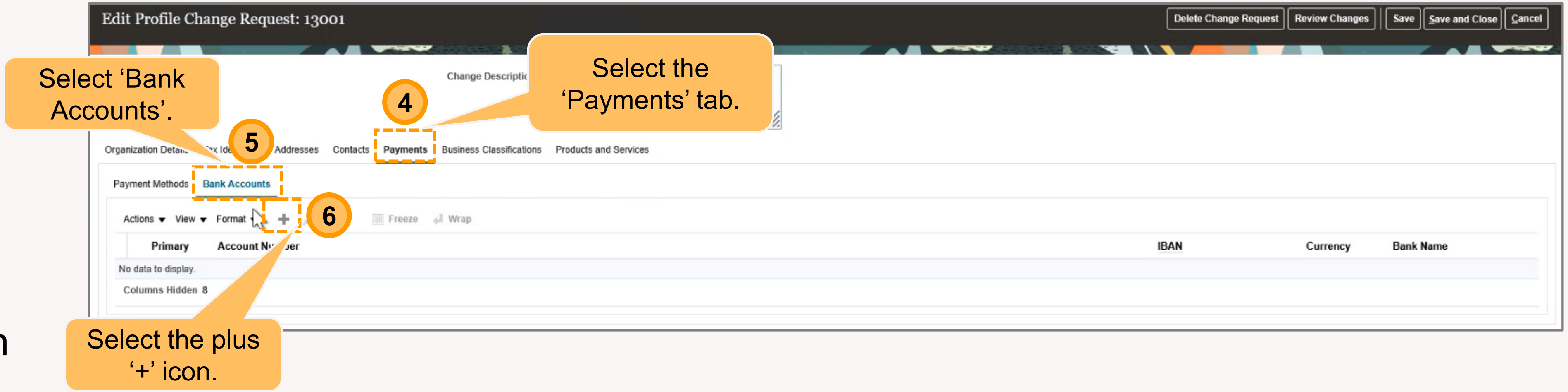
Select 'Yes' to continue.

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.



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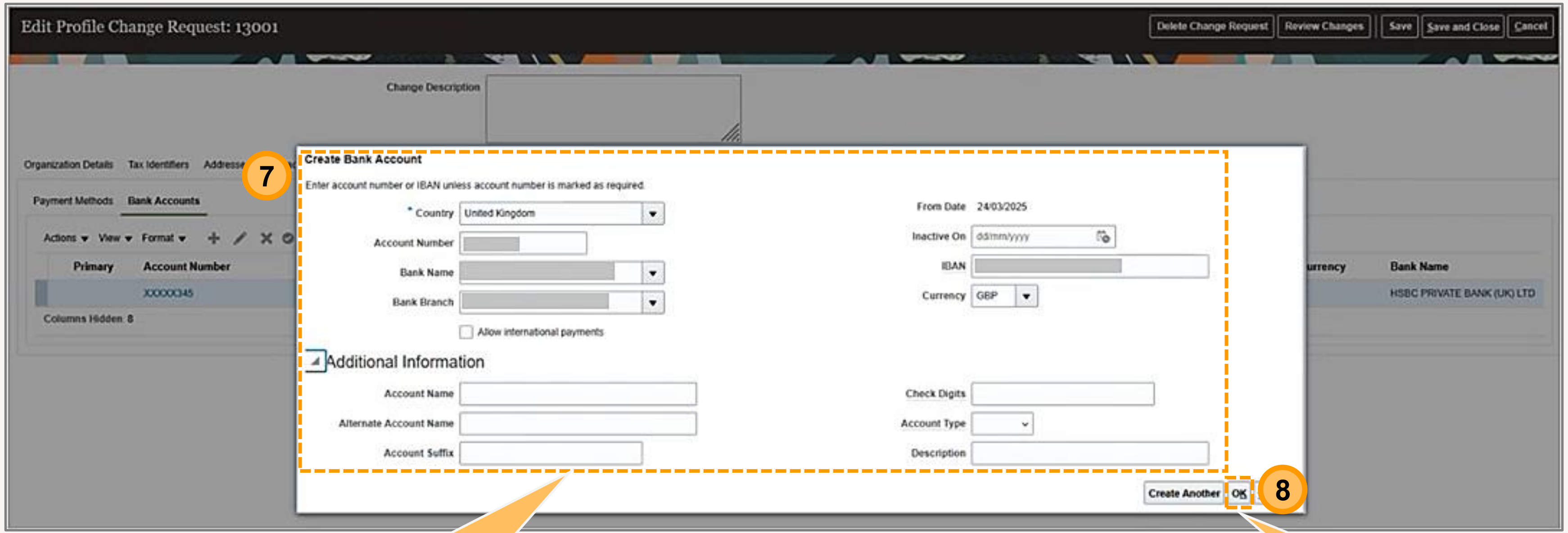
Manage bank details (cont'd)

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.



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

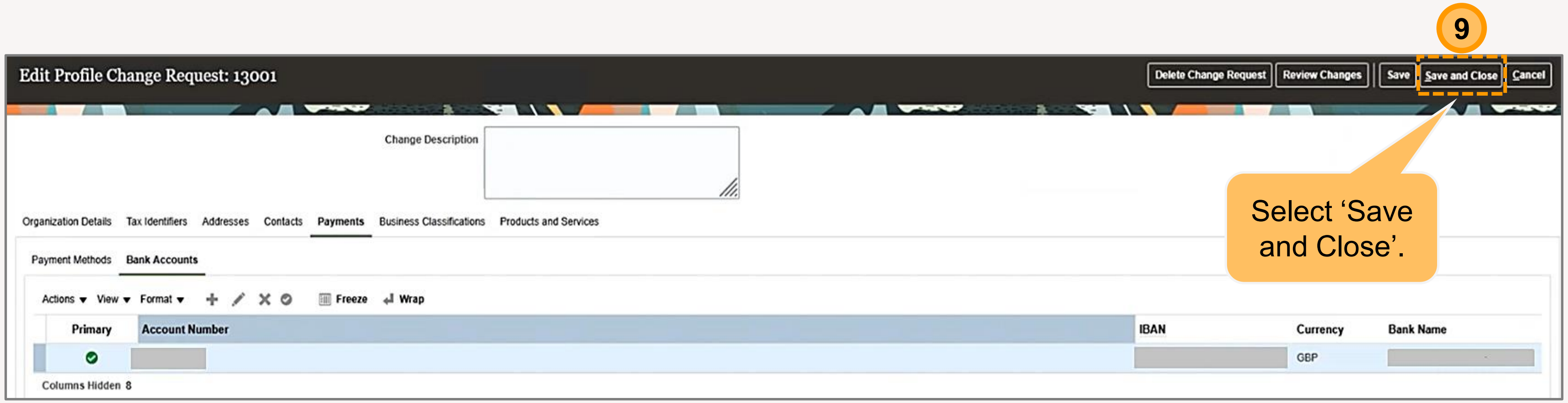
Select 'OK'.

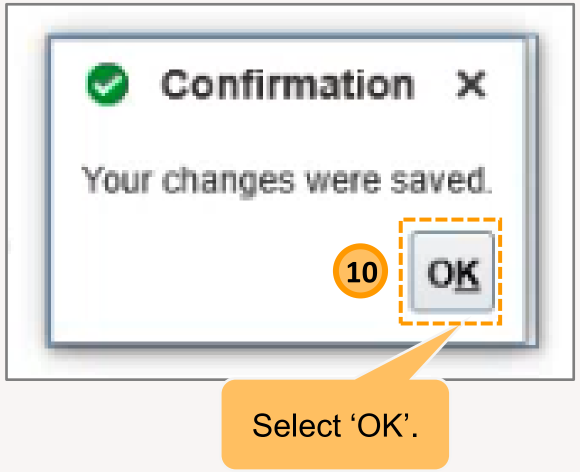
Manage bank details (cont'd)

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.





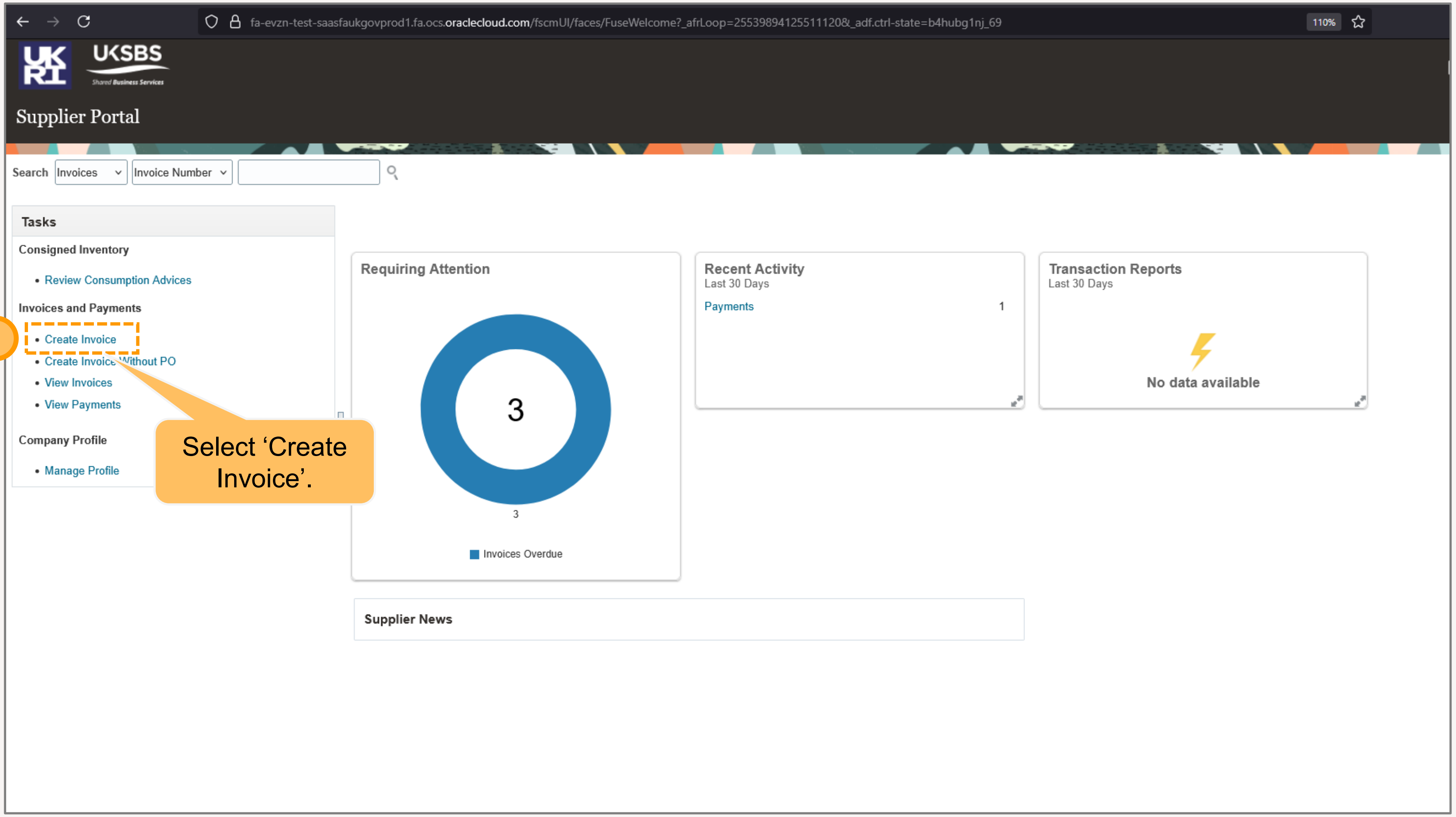
Topic 4: Create invoices

Create invoices

To create an invoice:

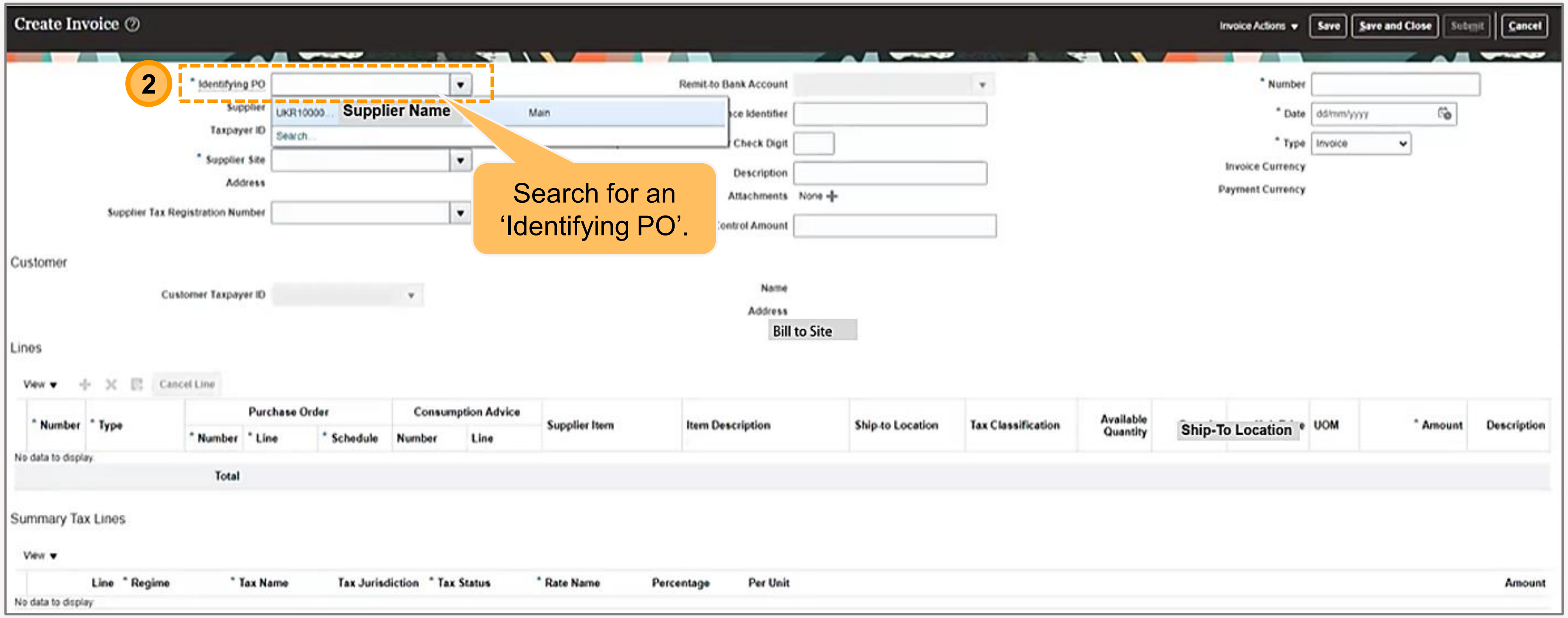
1. Navigate to the Tasks panel on the Supplier Portal and select ‘Create Invoice’ under the Invoices and Payments section.

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.

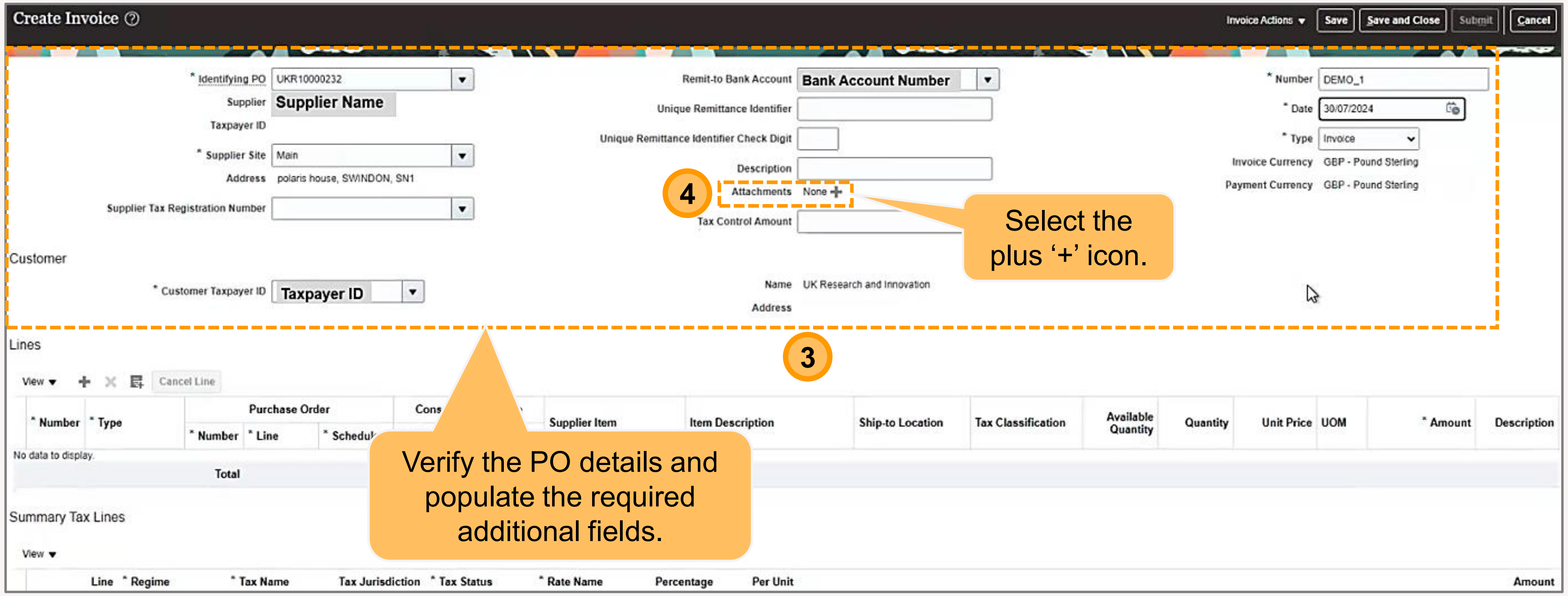


Create invoices (cont'd)

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.

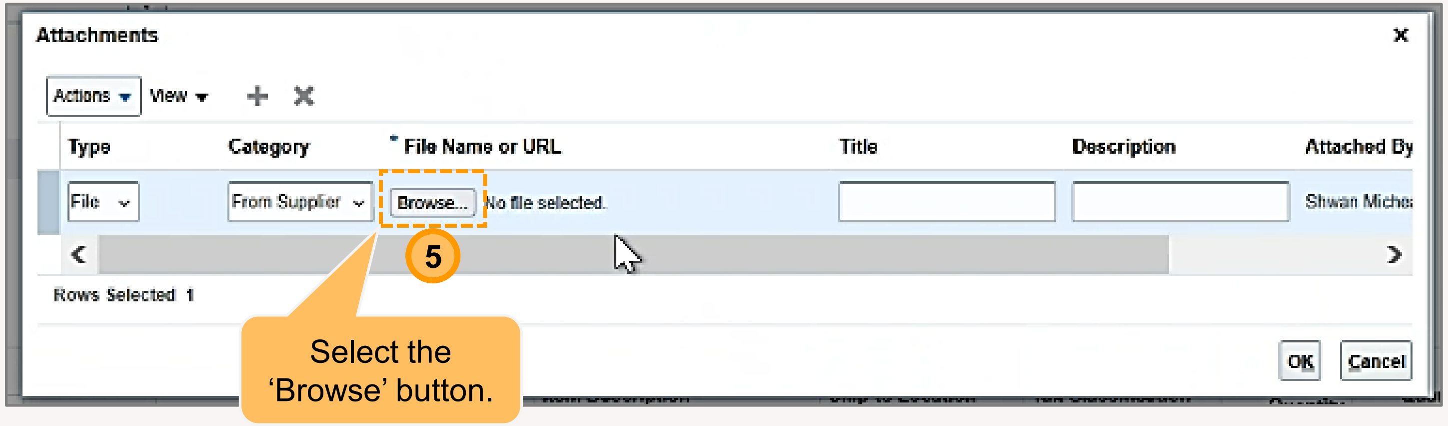
4. To add an attachment, select the plus '+' icon in the Attachments field.

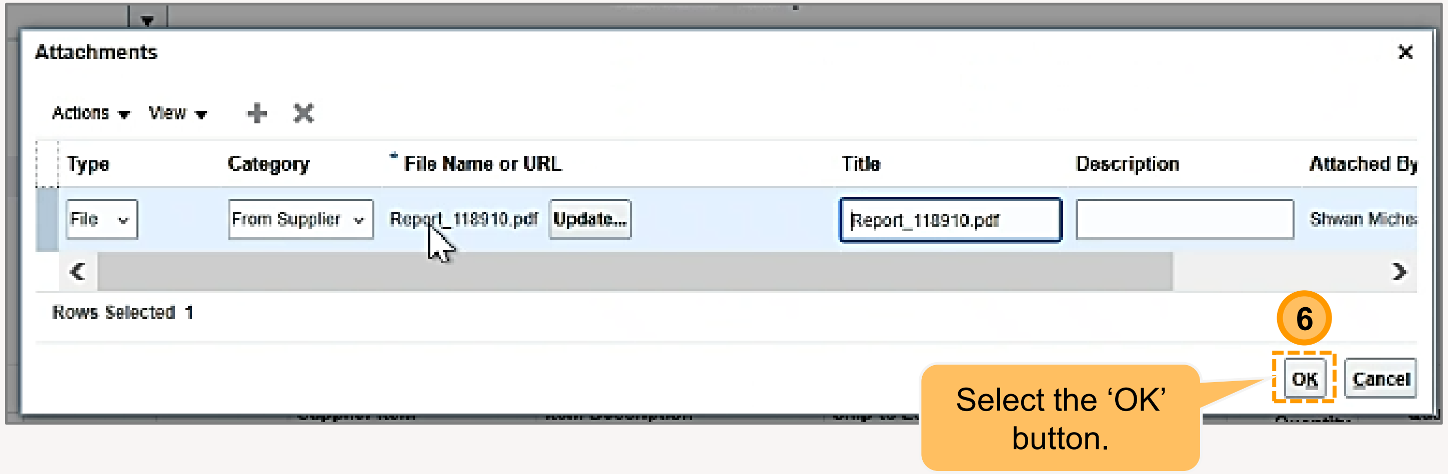


Create invoices (cont'd)

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.





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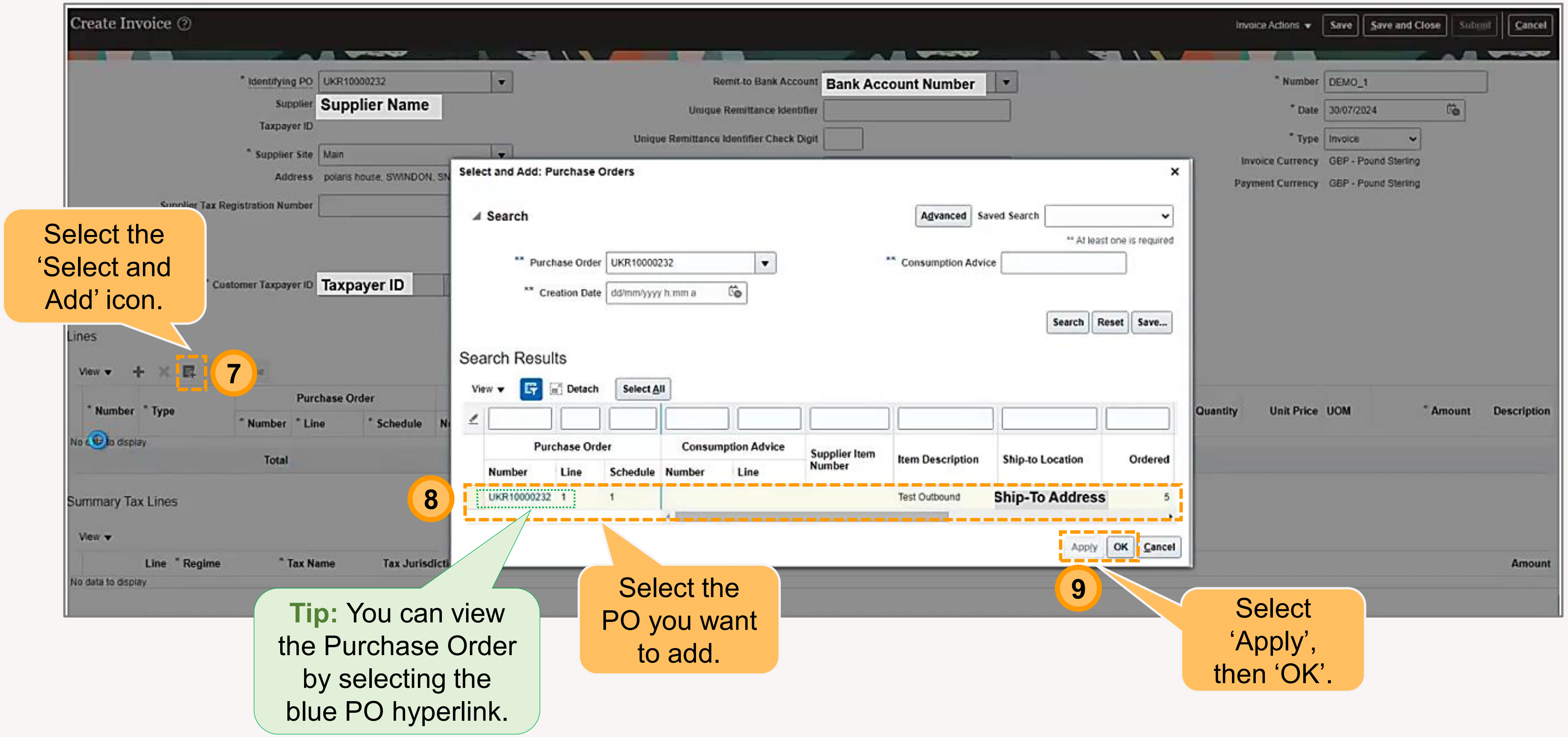
Create invoices (cont’d)

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.

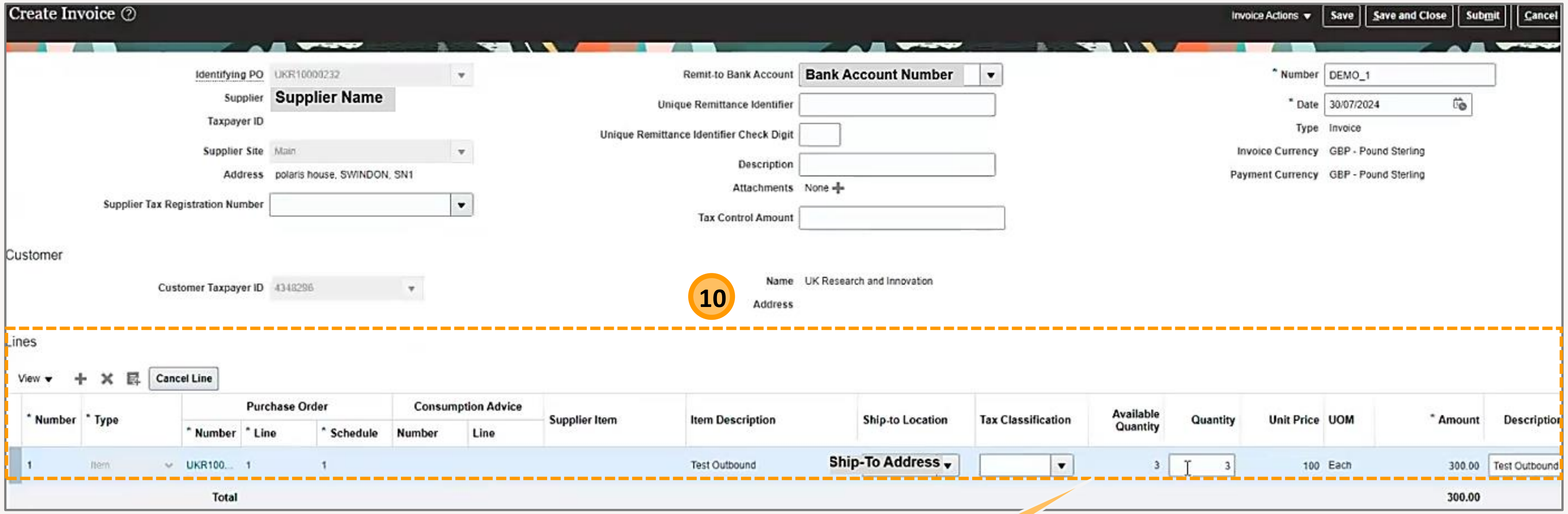
9. Select ‘Apply’ and then, ‘OK’.



Create invoices (cont'd)

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

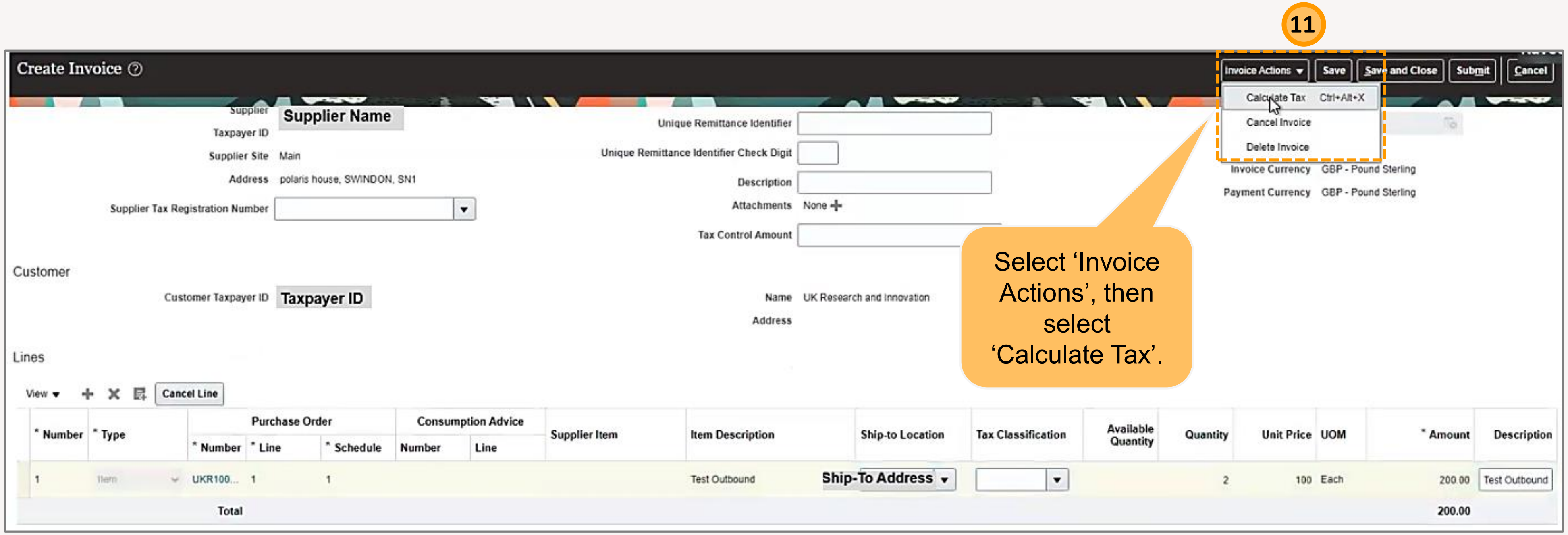
Note: When a supplier invoice is on hold, UKSBS need to release the hold to enable the invoice to proceed further



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.

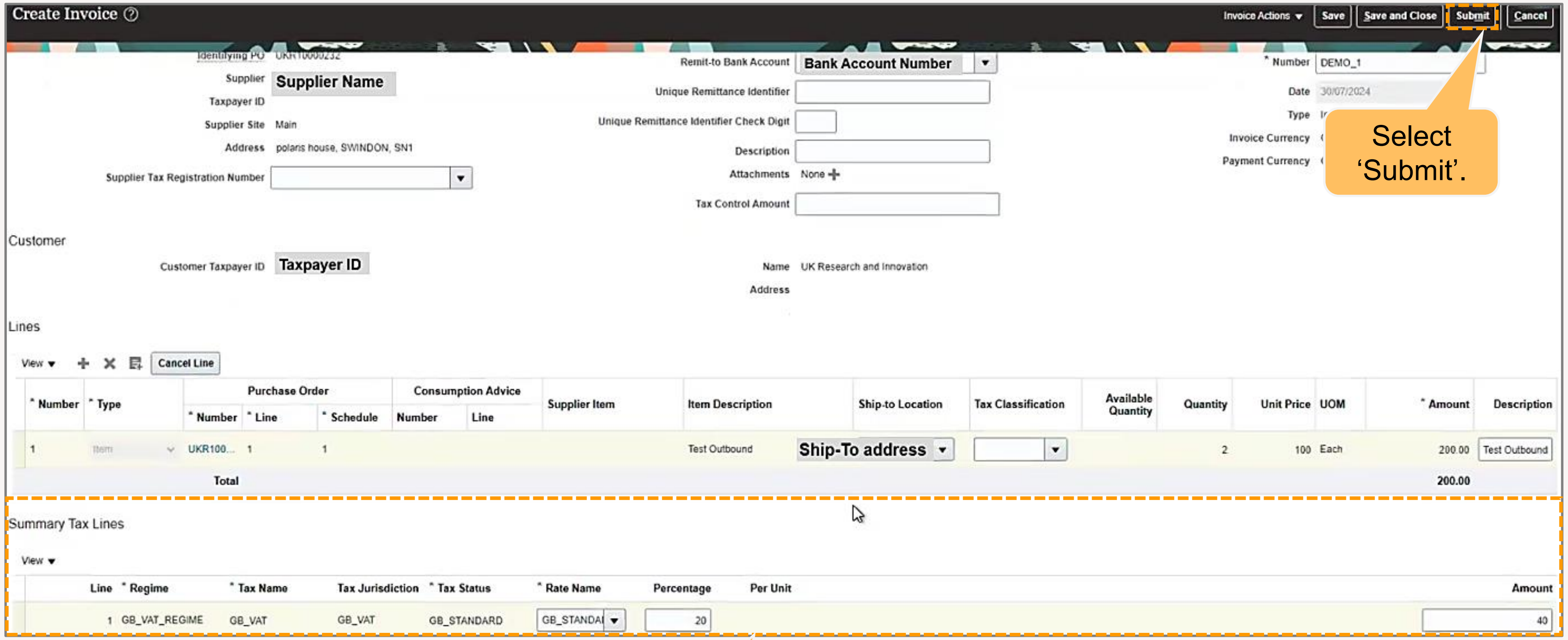


Create invoices (cont'd)

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

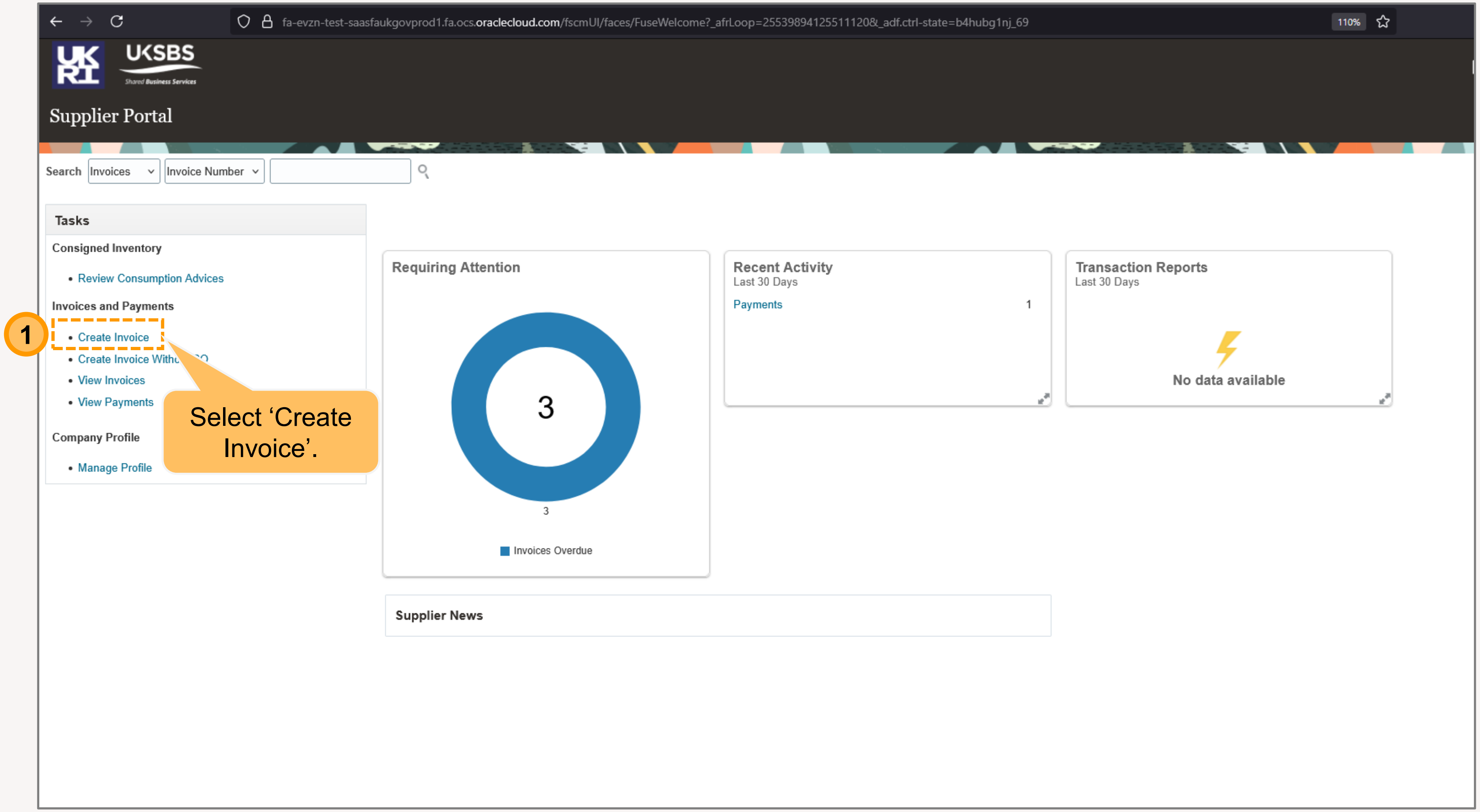
Check the tax calculated and amend, if required.

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.



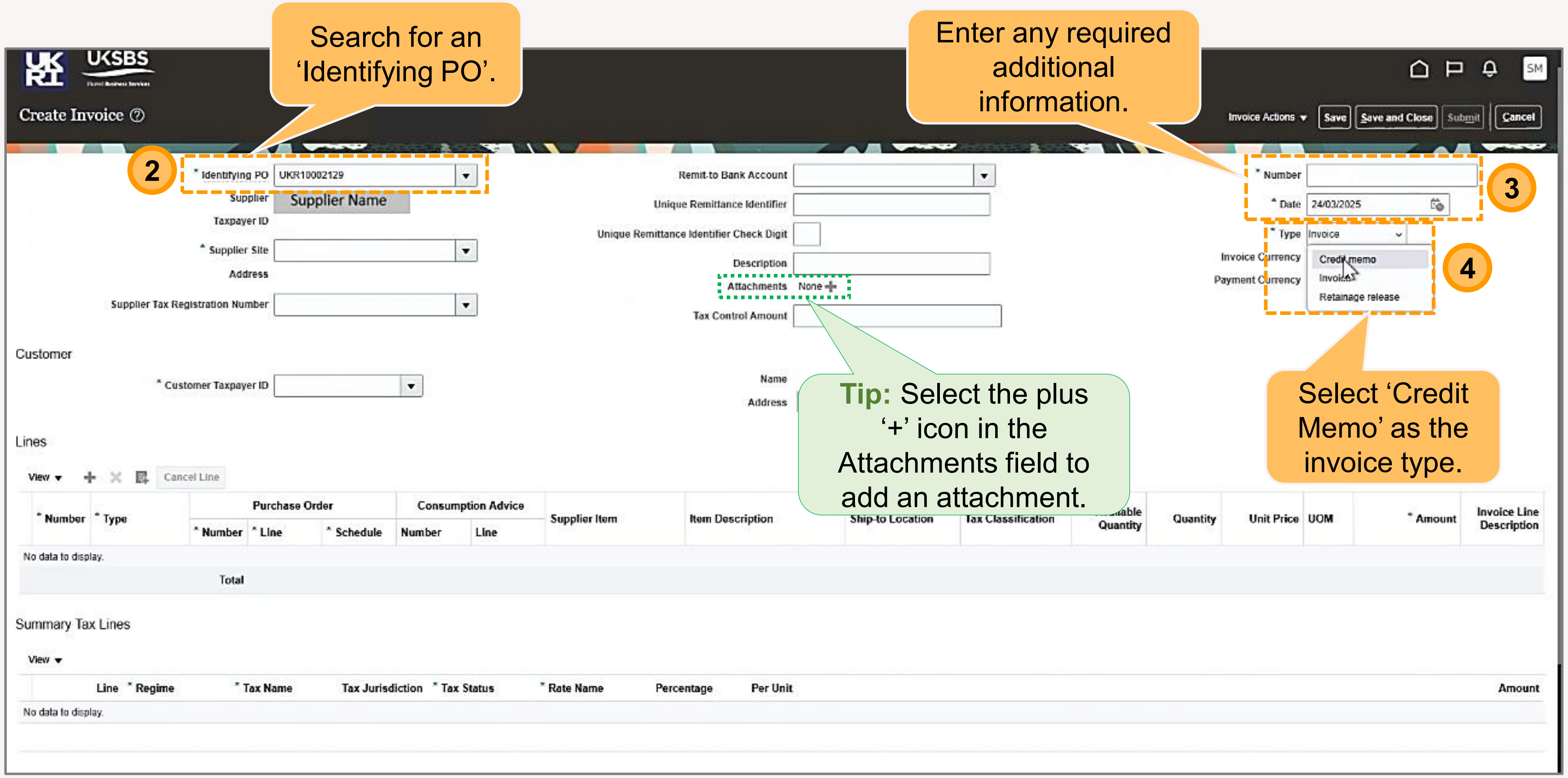
Create credit note for purchase order (cont'd)

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.

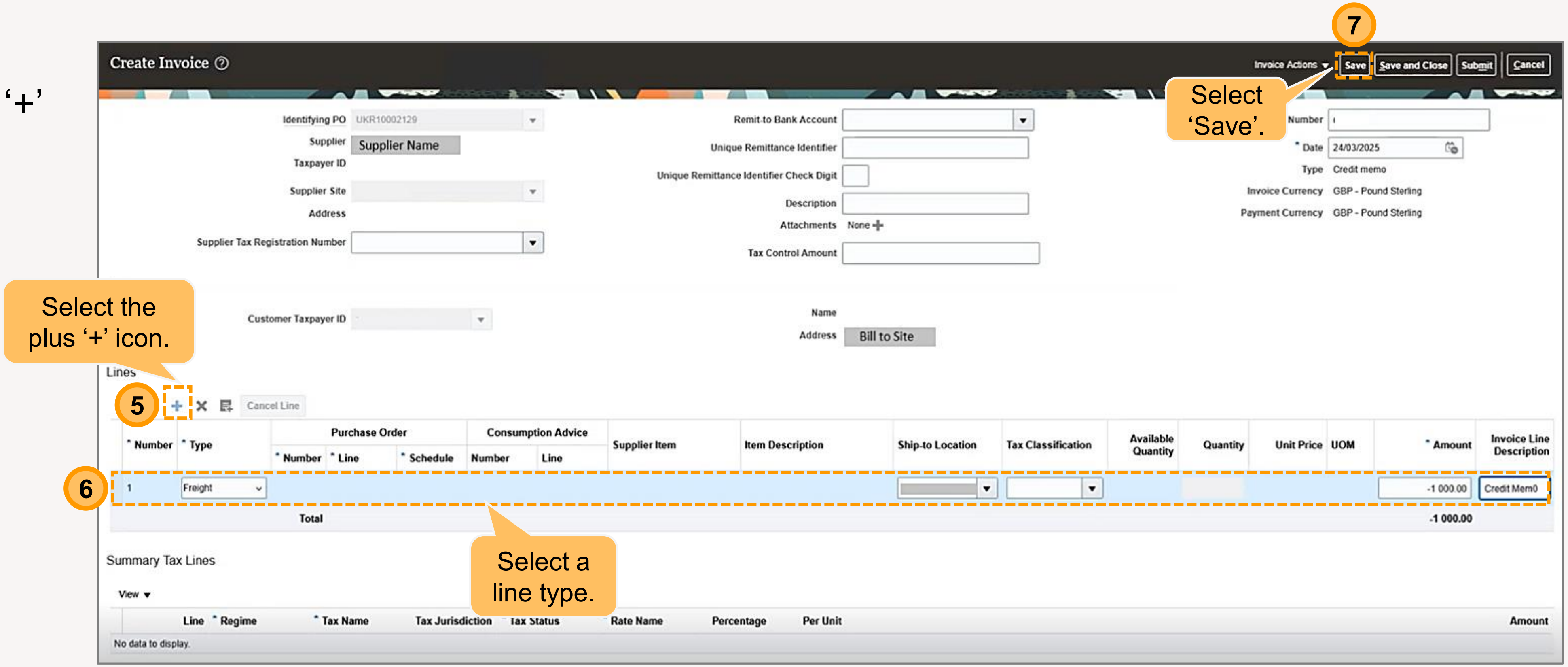


Create credit note for purchase order (cont'd)

5. Under the Lines section, select the plus '+' icon.

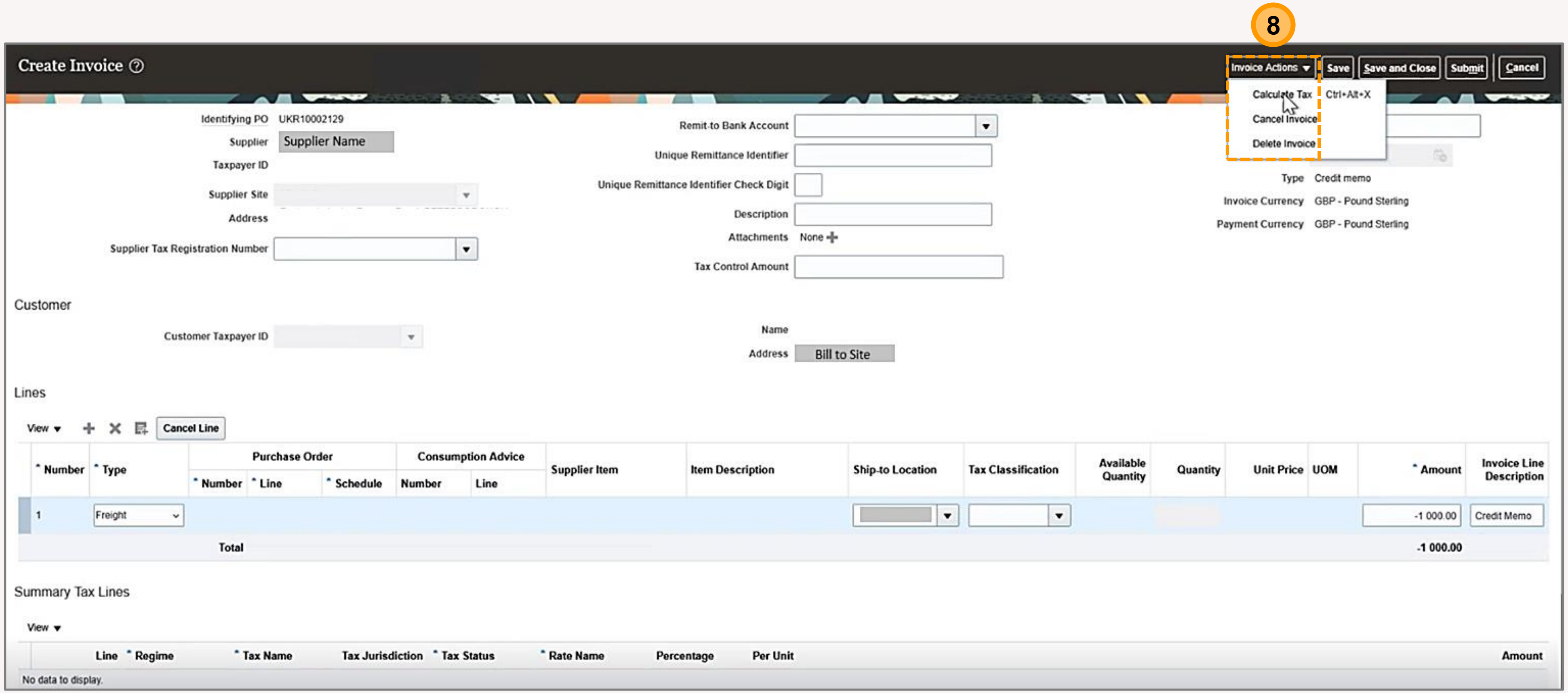
6. Select a line type.

7. Select 'Save'.



Create credit note for purchase order (cont'd)

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

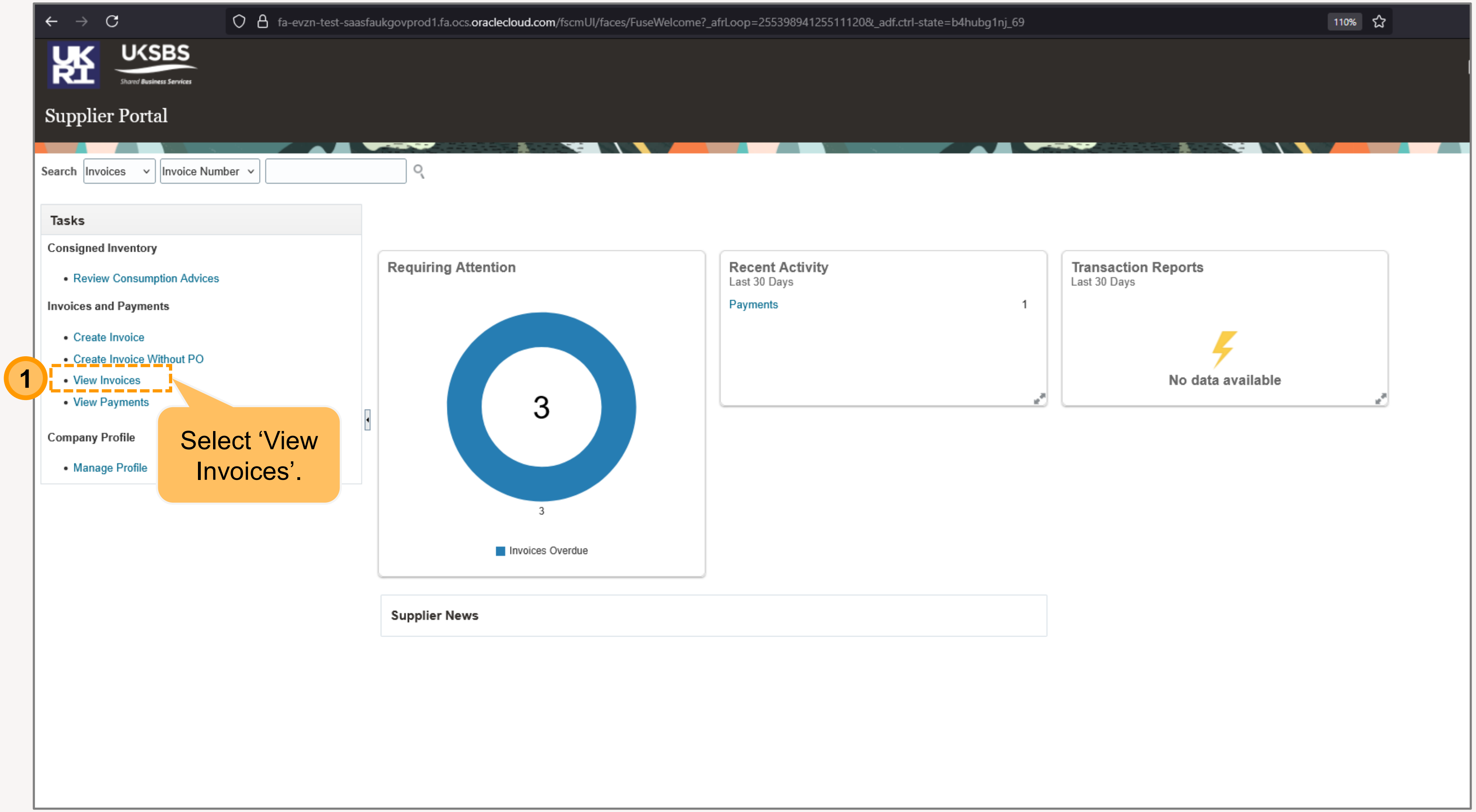


Topic 6: View invoices

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.



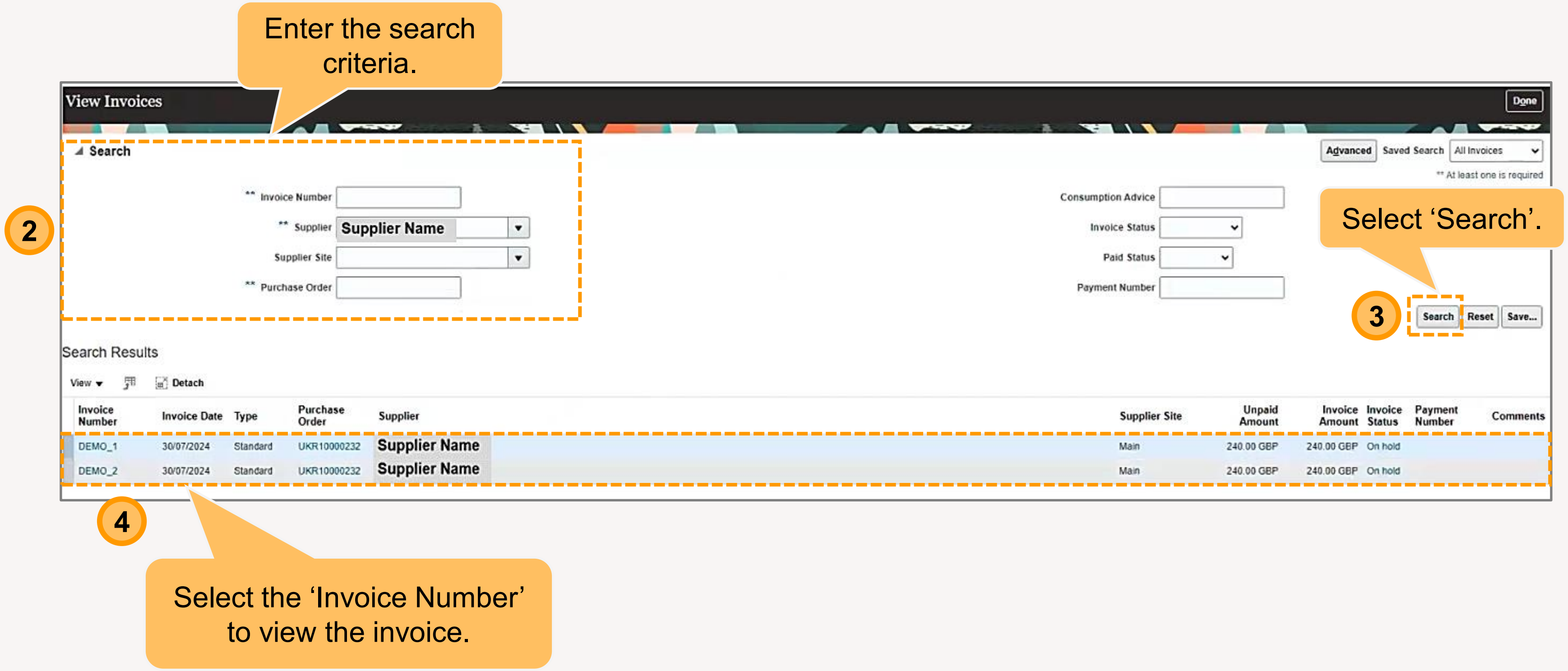
View invoices (cont'd)

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.

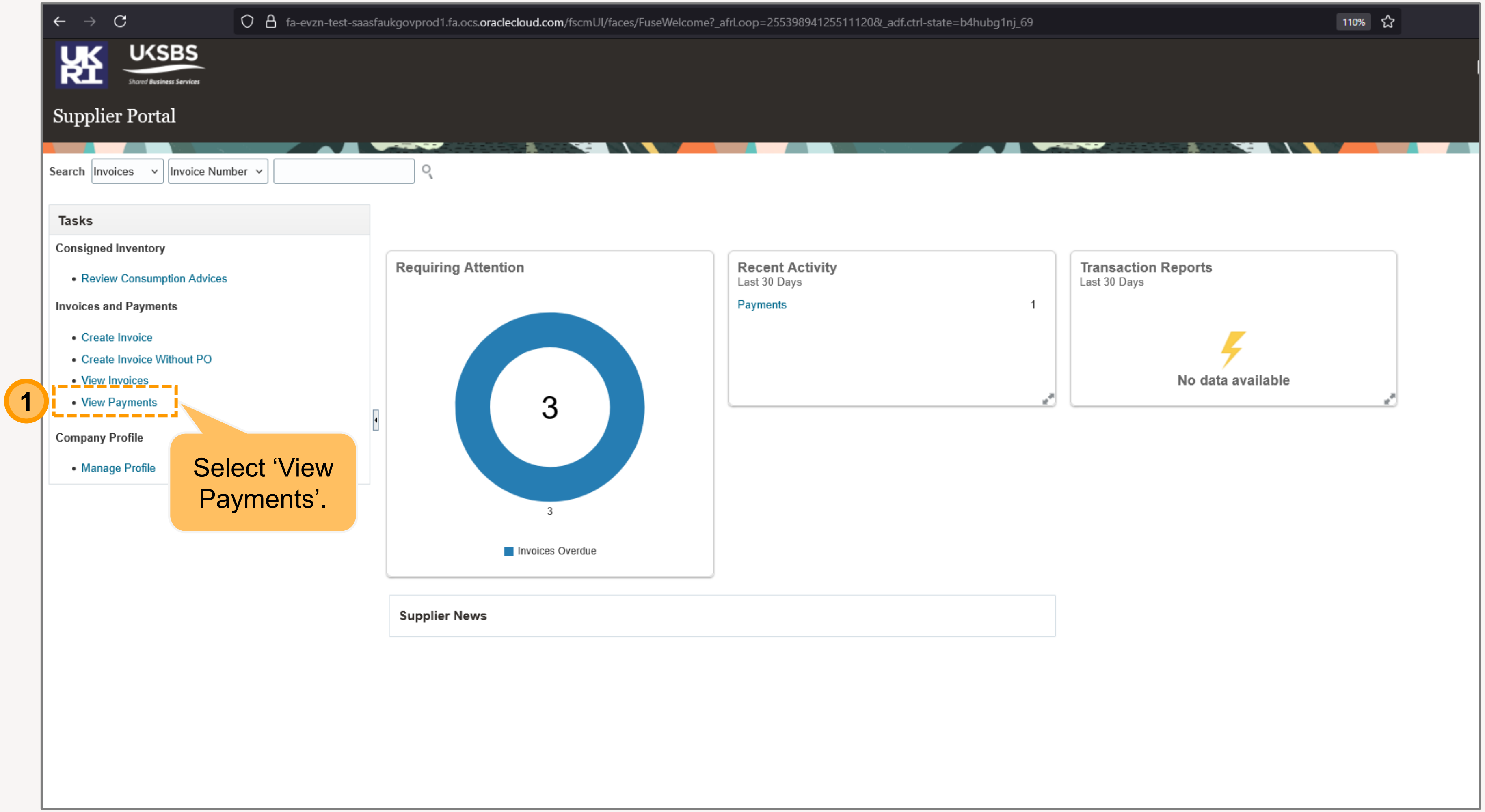


Topic 7: View payments

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.

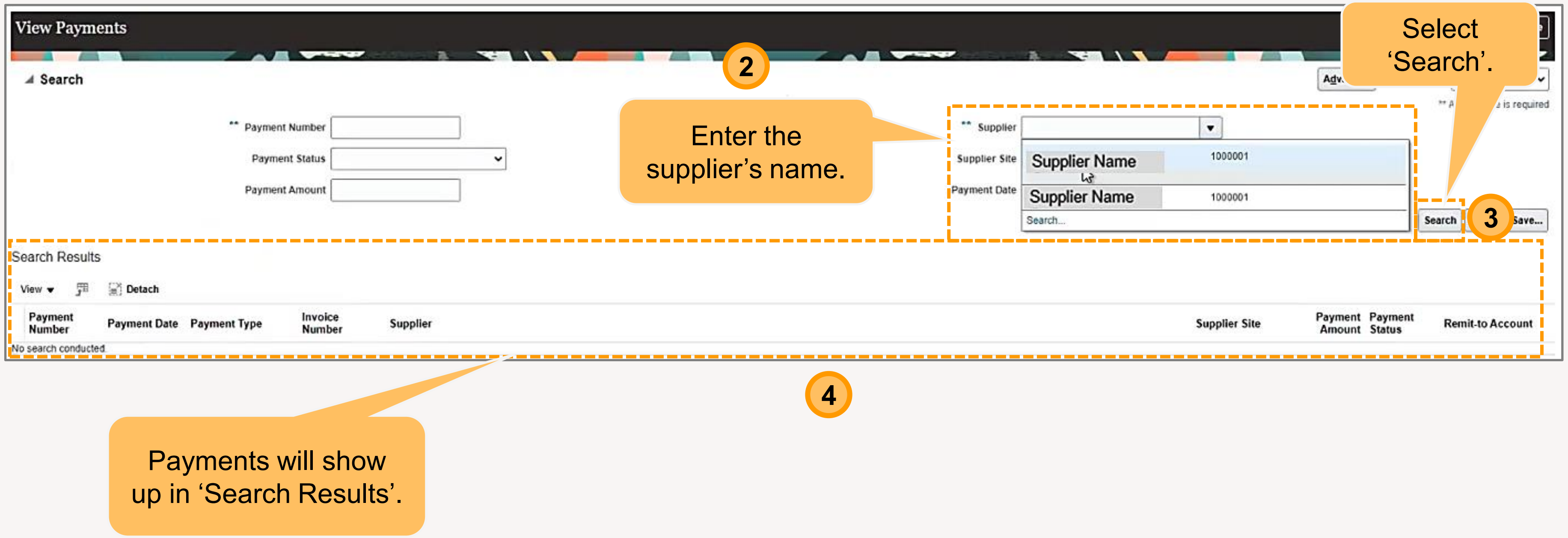


View payments (cont'd)

2. Enter the supplier's name.

3. Select 'Search'.

4. Any payments made will show up in the 'Search Results'.



Thank You