UK Research and Innovation

UKSBS Shared Business Services

Oracle Training
Supplier portal

How to Guide for external suppliers

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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 organisations 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 M 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 (PO)	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.

Supplier portal overview

- The Supplier portal in Oracle Fusion is a self-service platform that enables suppliers to manage their business transactions with an organisation efficiently. It provides a centralised 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 organisations 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

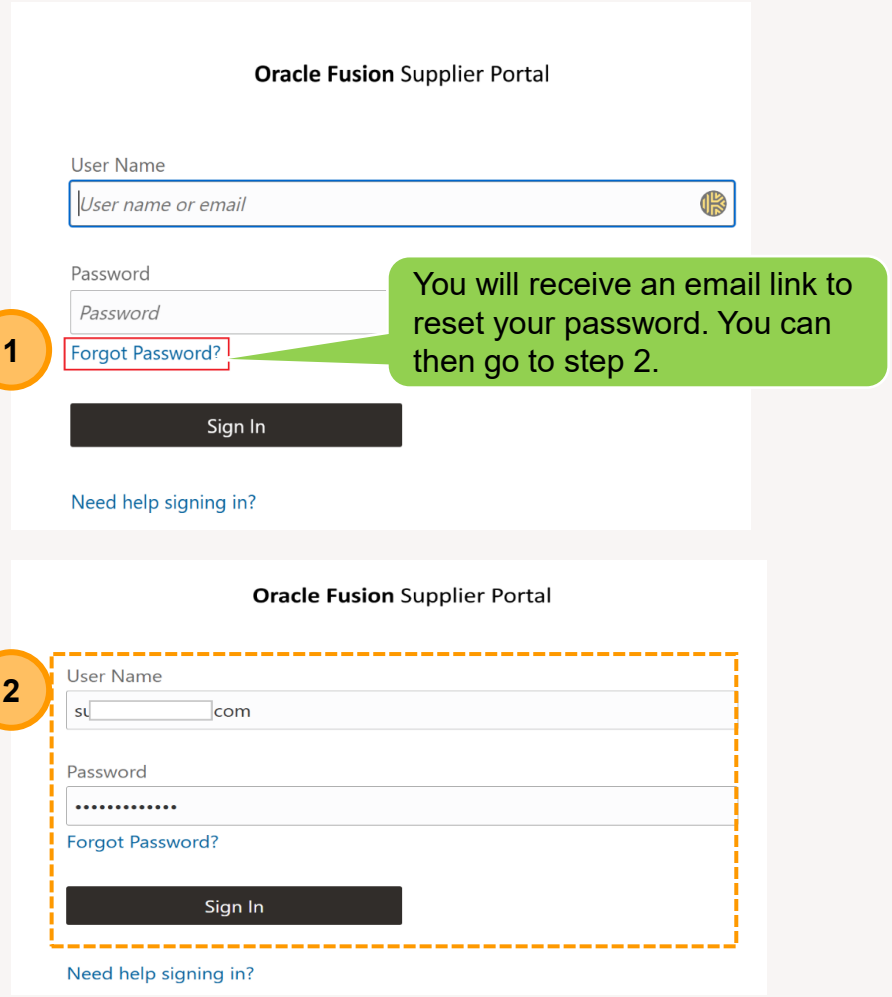


We are committed to making our training material accessible to all, but should you have any concerns or suggestions for improvement, please contact knowledge@uksbs.co.uk

Supplier portal login

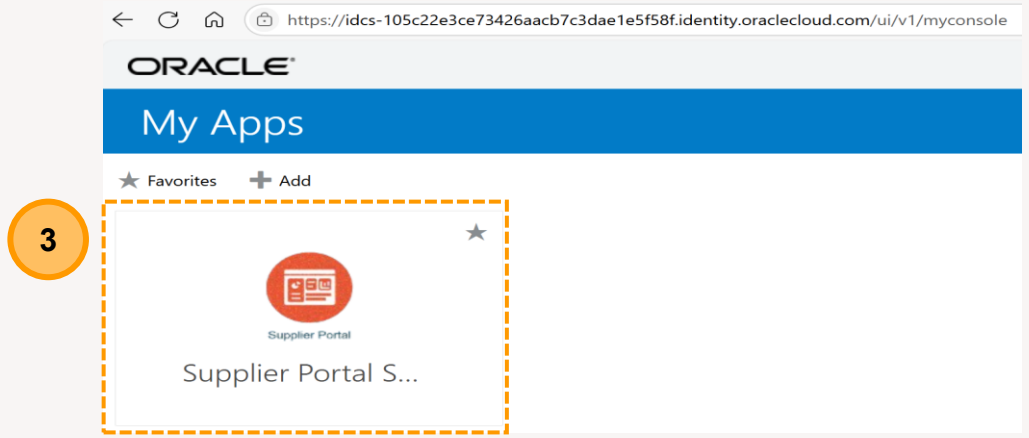
Log in to the Supplier portal.

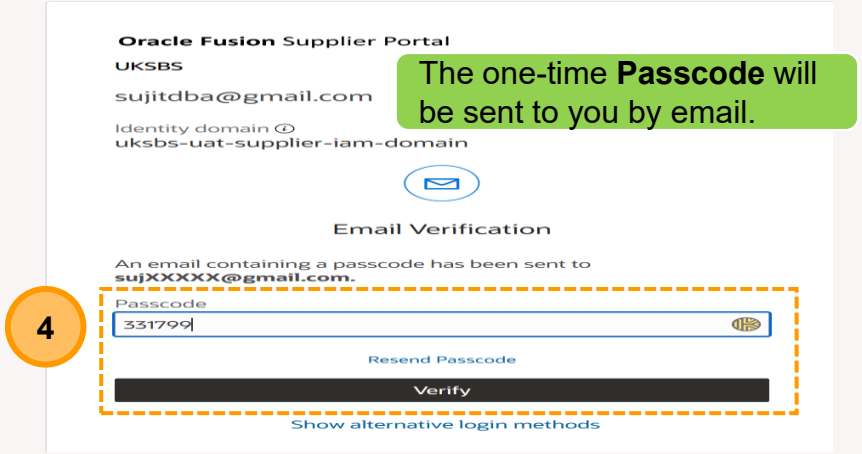
1. If this is your first time logging in, select **Forgot Password?** If not, go to step 2.
2. Add your **User Name**, **Password** and select **Sign In**.



Supplier portal login (cont'd)

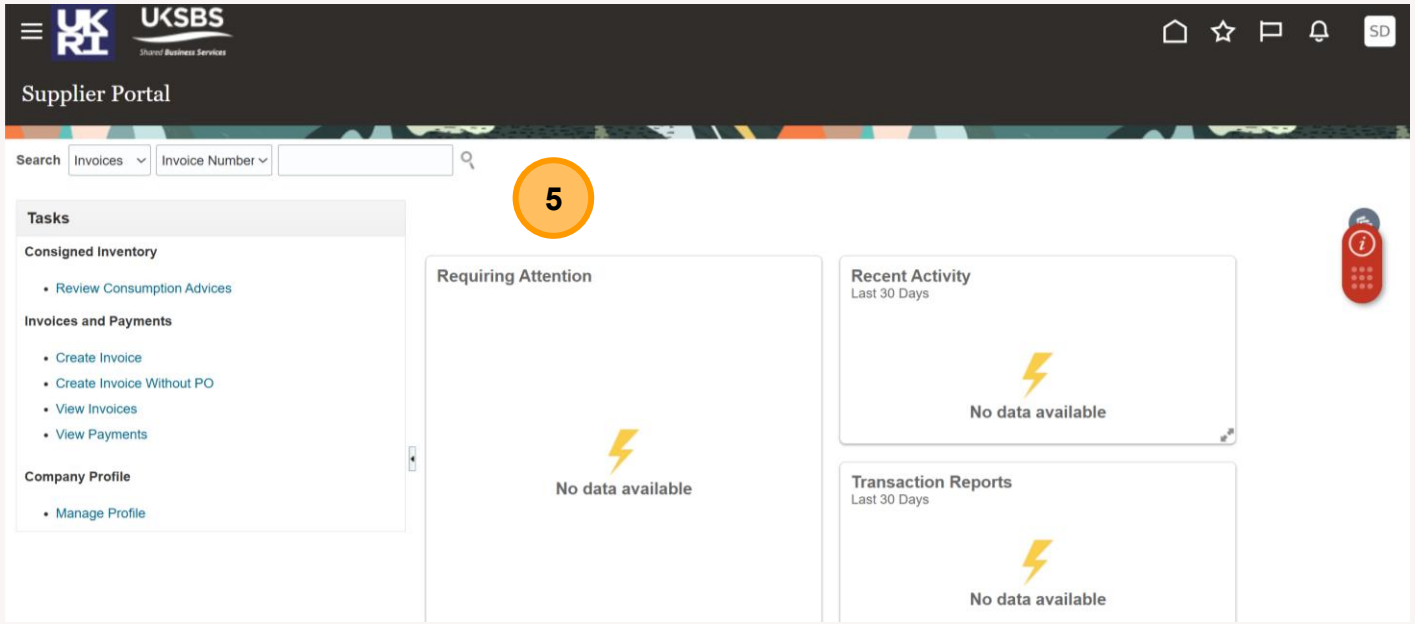
3. Select the **Supplier Portal** tile in **My Apps**.
4. Enter the one-time **Passcode** and select **Verify**.





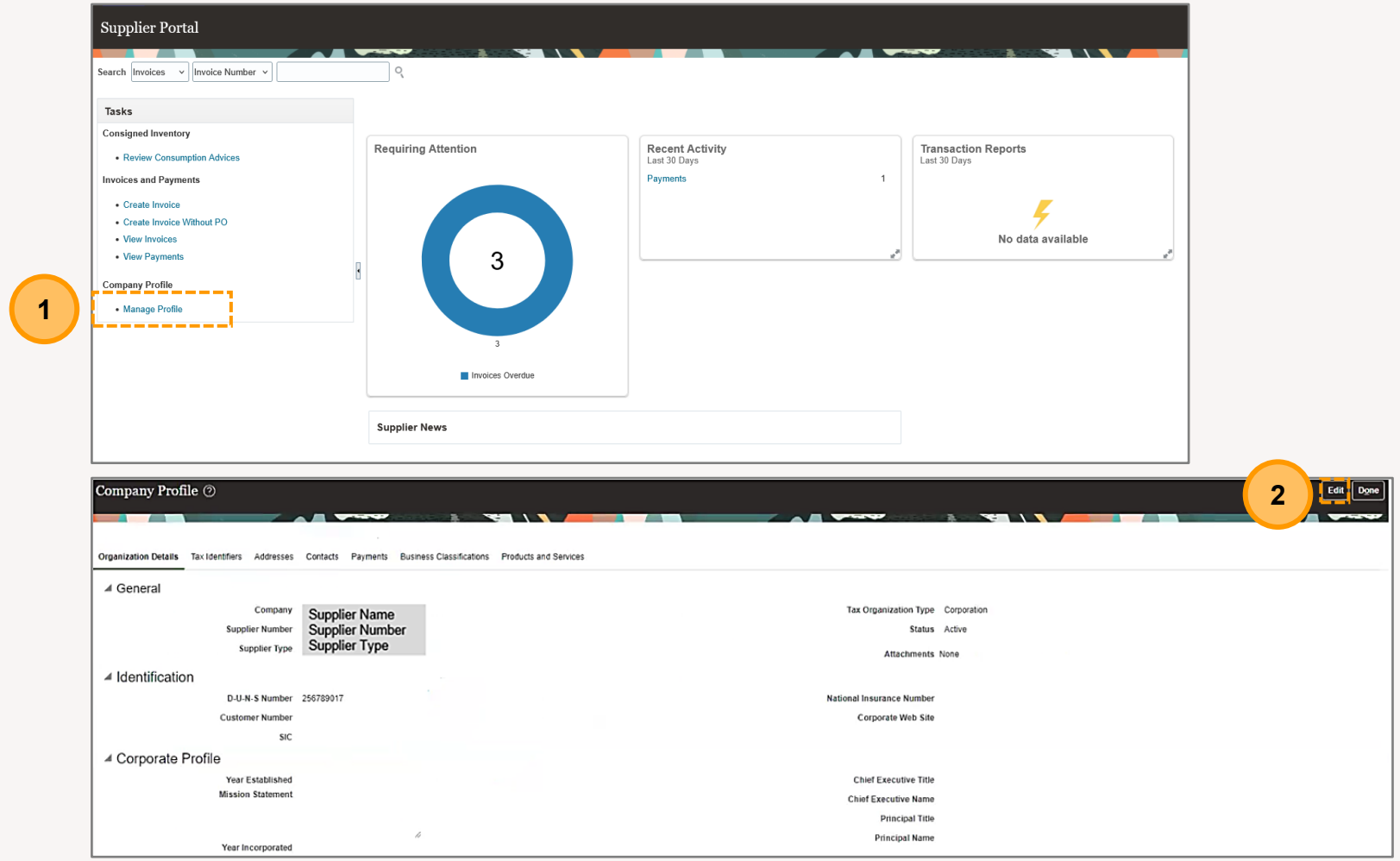
Supplier portal login (cont'd)

5. You will then be successfully logged in and will be able to view your **Supplier Portal** dashboard.



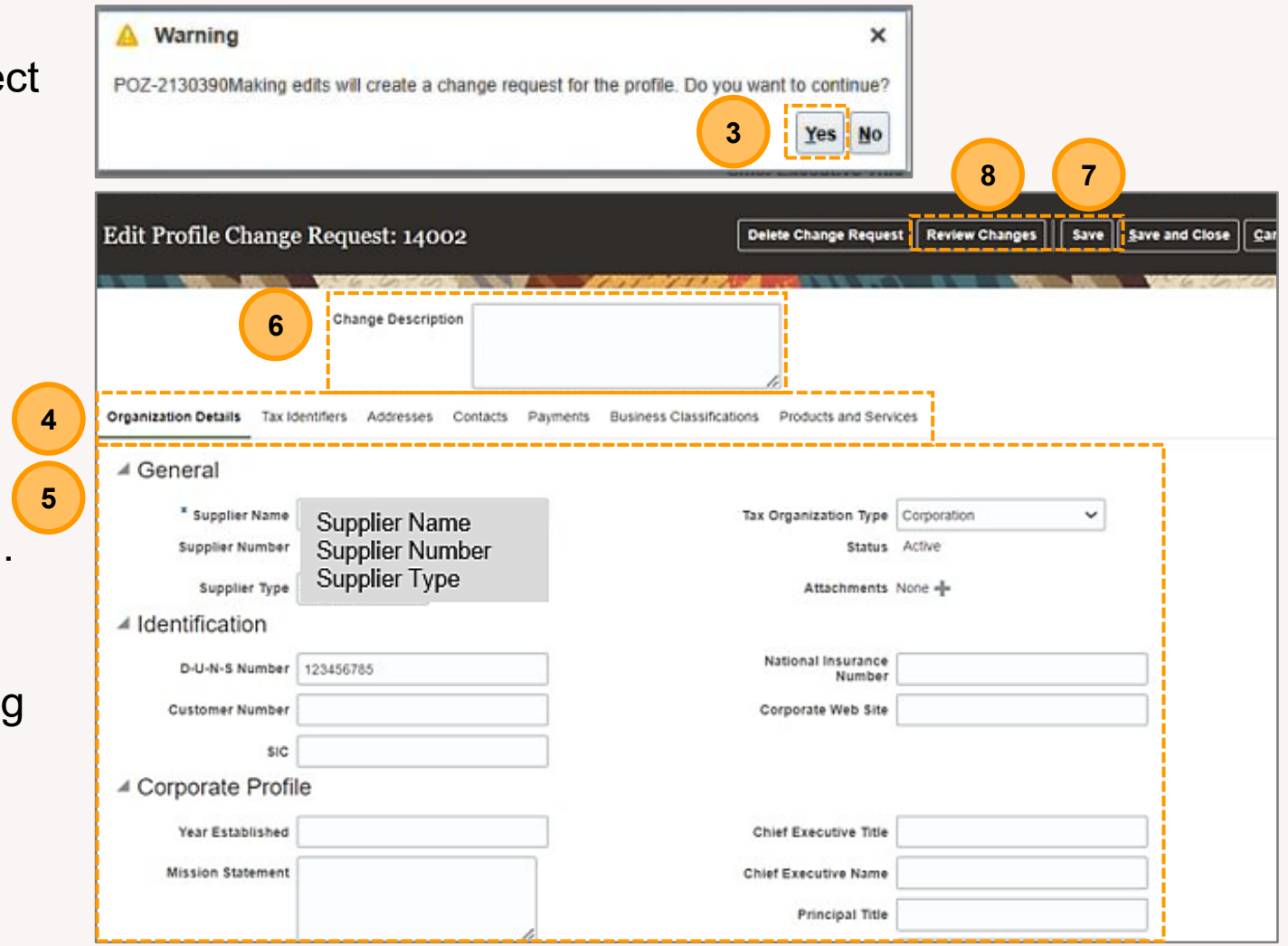
Managing your Company profile

1. Select **Manage Profile** in the **Company Profile** section.
2. Select **Edit** to update your company details.



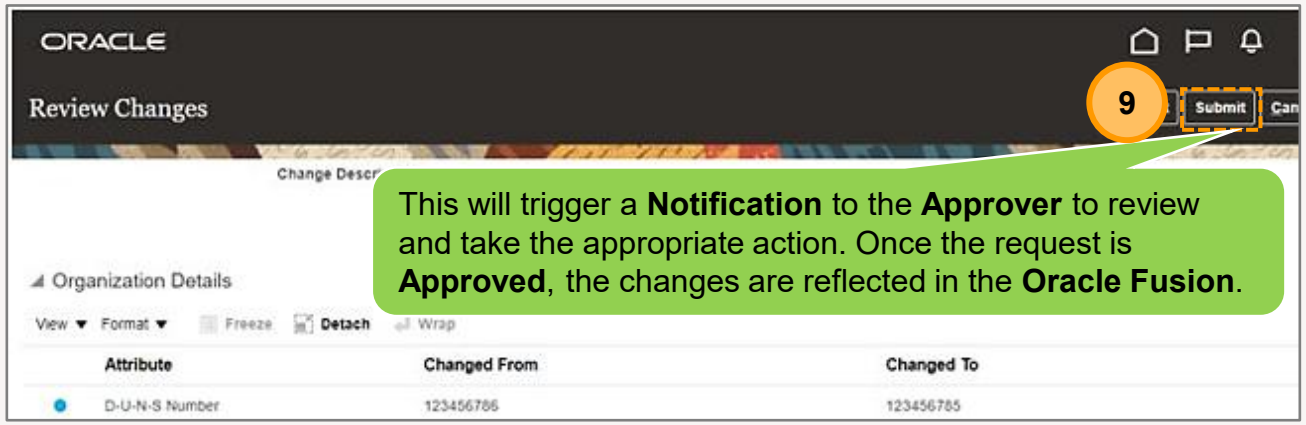
Managing your Company profile (cont'd)

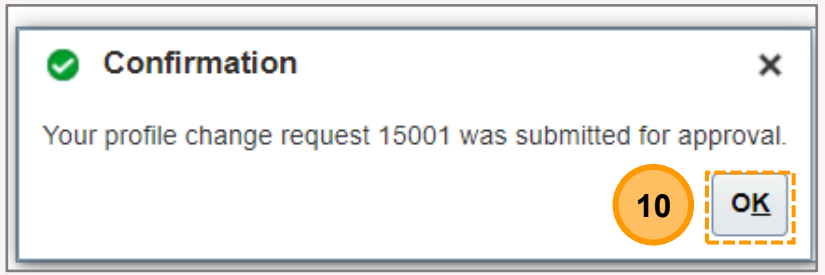
3. When the **Warning** pop up appears, select **Yes**.
4. Select the tab based on the details you wish to change.
5. Change the details as required.
6. Once completed, add details of the change(s) made to **Change Description**.
7. Select **Save**.
8. You can review your changes by selecting **Review Changes**.



Managing your Company profile (cont'd)

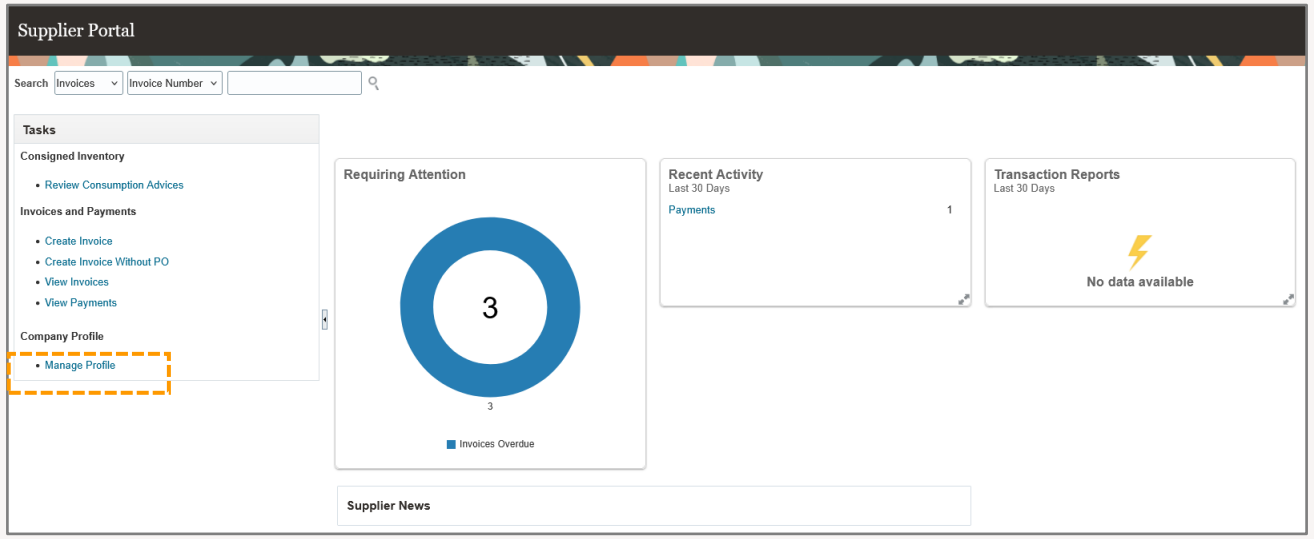
9. Select **Submit** to submit the changes.
10. Select **OK** when the **Confirmation** message appears.

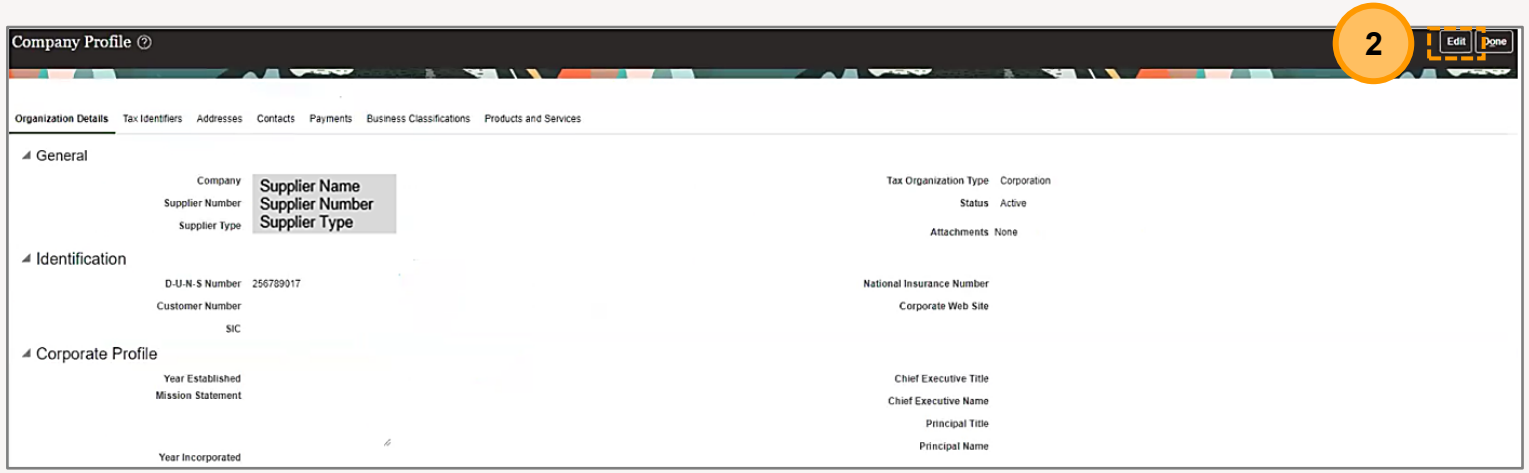




Managing bank details

1. Select **Manage Profile** in the **Company Profile** section.
2. Select **Edit** to update your bank details.

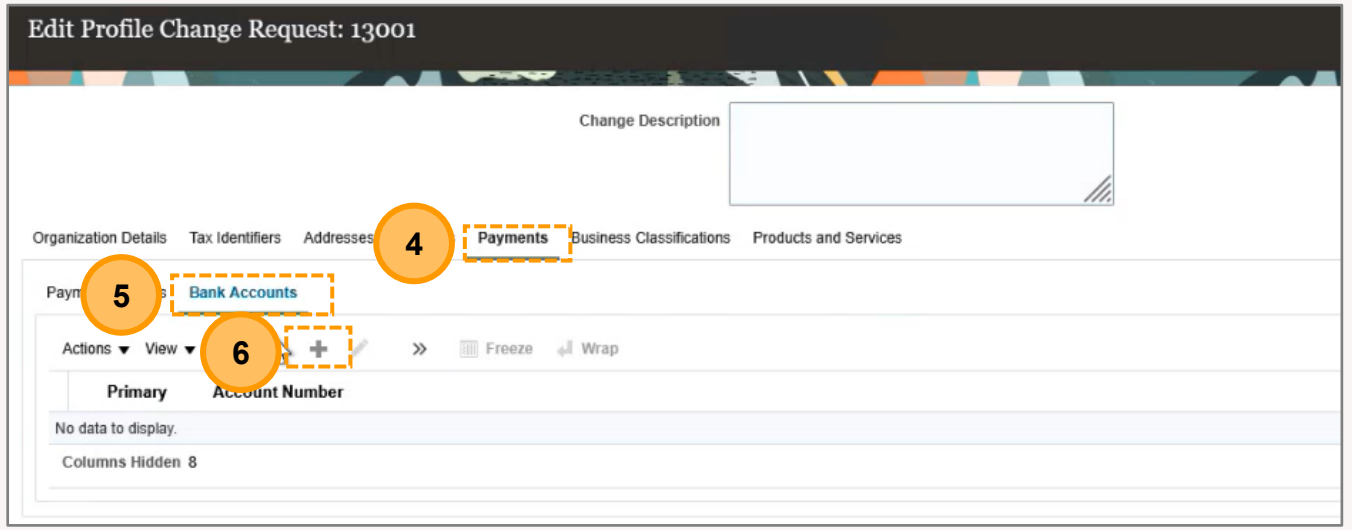




Managing bank details (cont'd)

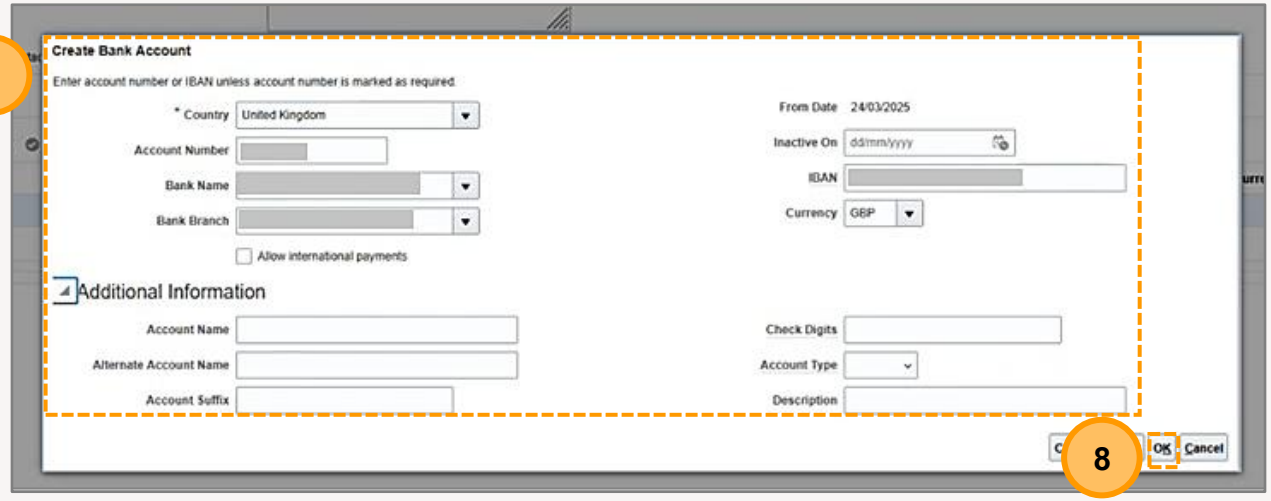
3. When the **Warning** pop up appears, select **Yes**.
4. Select the **Payments** tab.
5. Select **Bank Accounts**.
6. Select **+** to add the new bank details.





Managing bank details (cont'd)

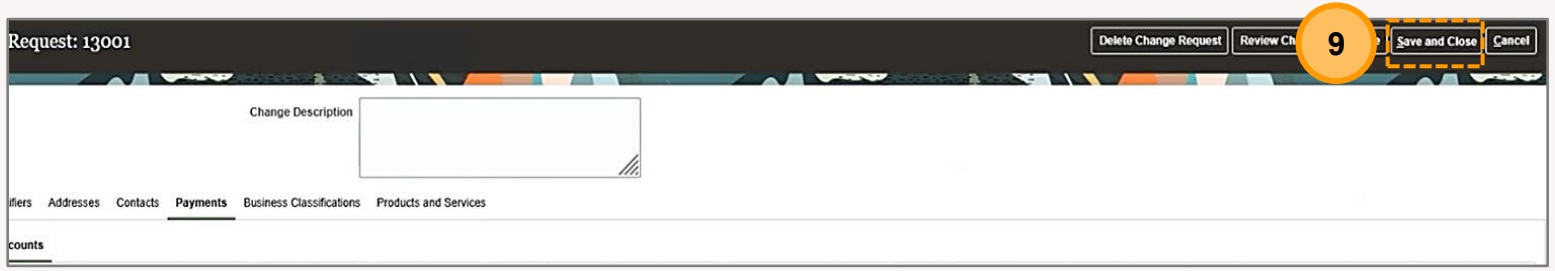
7. Complete the **Bank Name**, **Bank Branch**, **Currency** and **Account Number** fields. All other fields are optional and can be completed if required.
8. Once completed, select **OK**.



Suppliers based outside the UK can use the Supplier Portal to submit their invoices. However, if you need to add or change existing bank details, this cannot be done via the Supplier Portal. Please email p2pdatabasemanagement@uksbs.co.uk and they will send you a Non-UK Supplier form to complete and return to them. They can then make the requested changes.

Managing bank details (cont'd)

9. Select **Save and Close**.
10. Select **OK** when the **Confirmation** message appears.

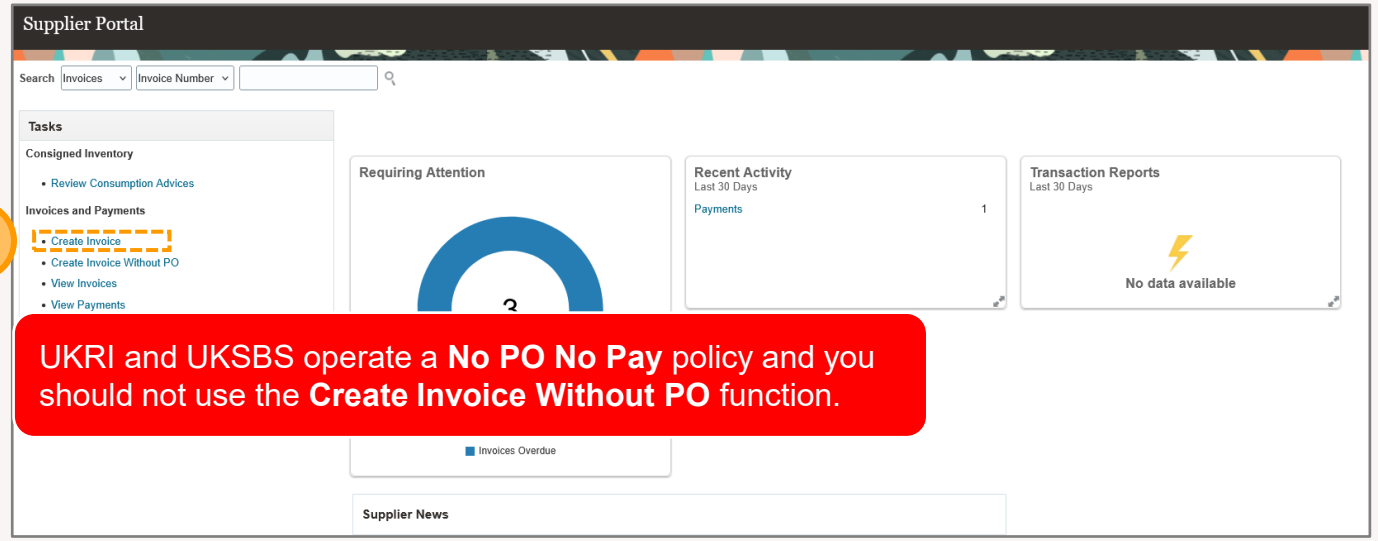


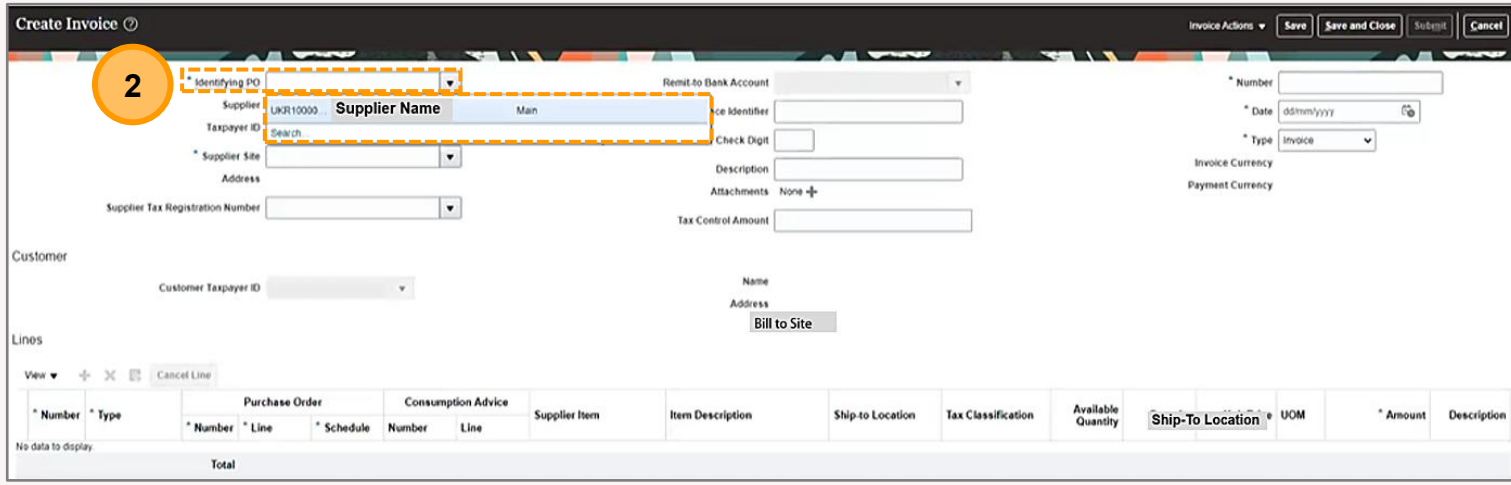


If a bank or branch details are missing, please contact **P2PDatabaseManagement@uksbs.co.uk**

Creating invoices

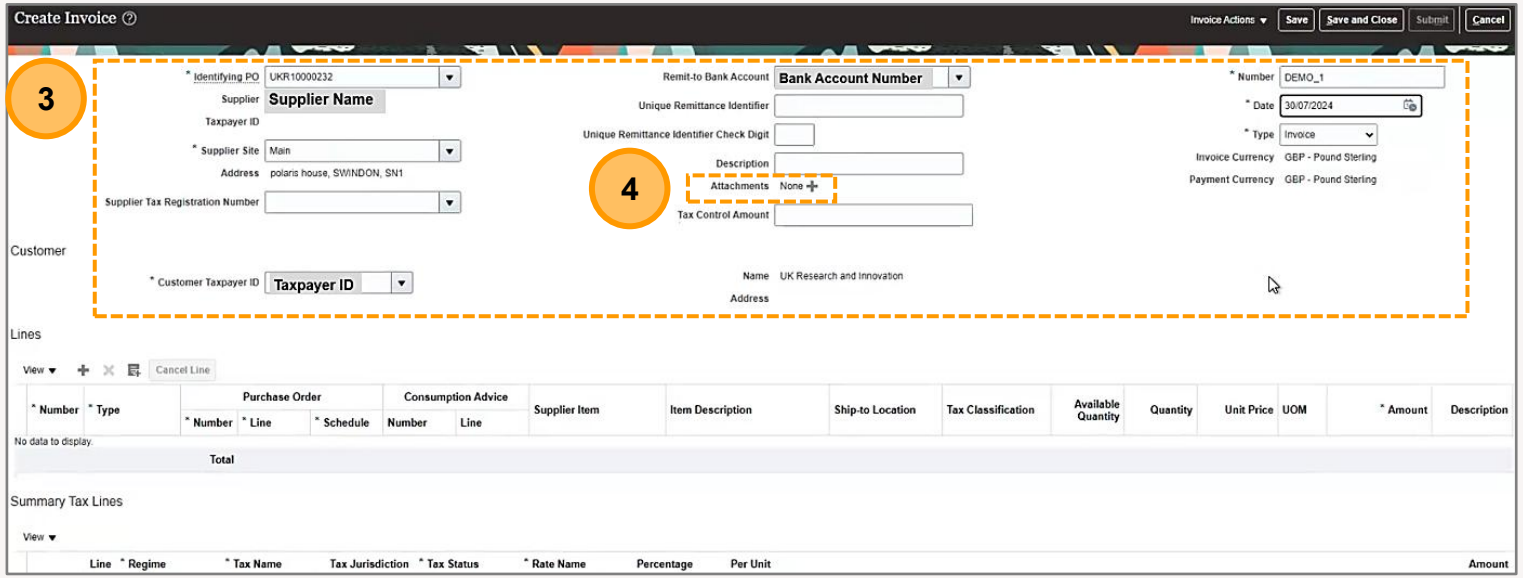
1. Select **Create Invoice** in the **Invoices and Payments** section.
2. Search for or select the Purchase Order from the **Identifying (PO)** field using the dropdown menu.

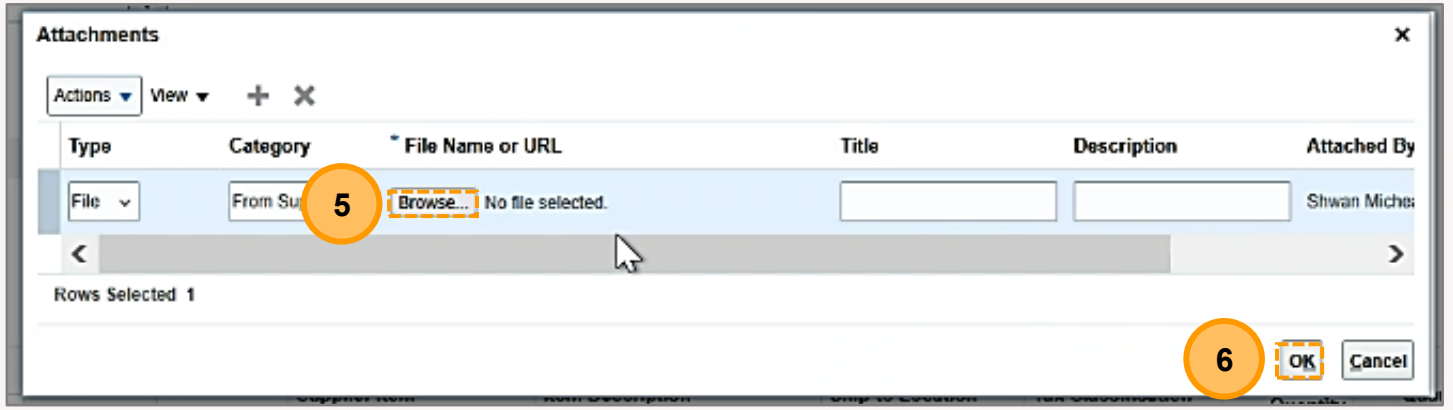




Creating invoices (cont'd)

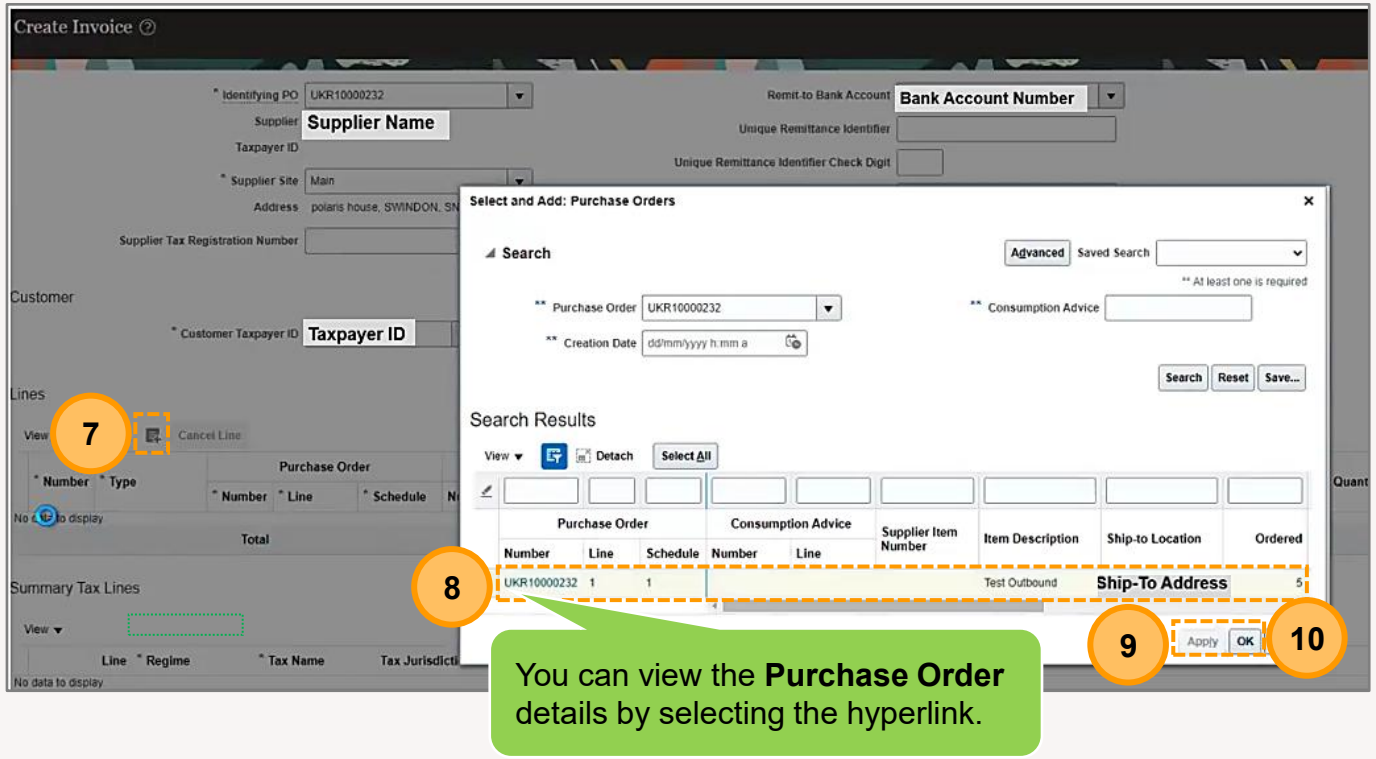
3. The Purchase Order details will be displayed. You can verify if the information is correct and enter any required additional information, including the invoice **Number**, **Date** and **Type** of invoice.
4. Select **+** to add an **Attachment**.
5. Select **Browse** to locate and attach the required **Attachment**.
6. Once completed, select **OK**.





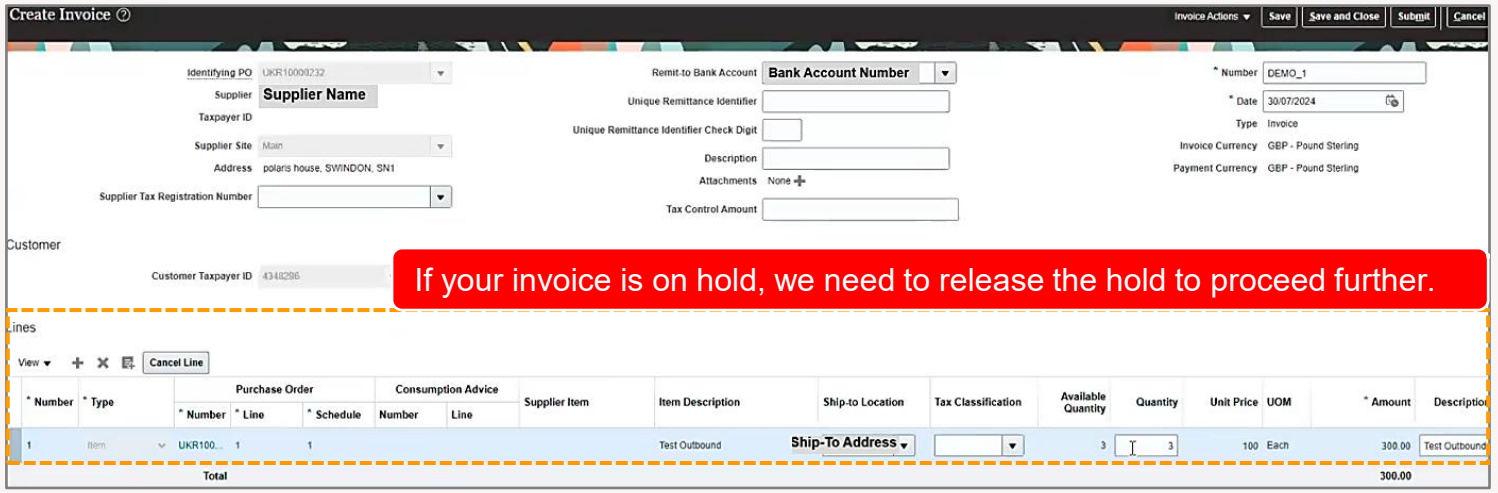
Creating invoices (cont'd)

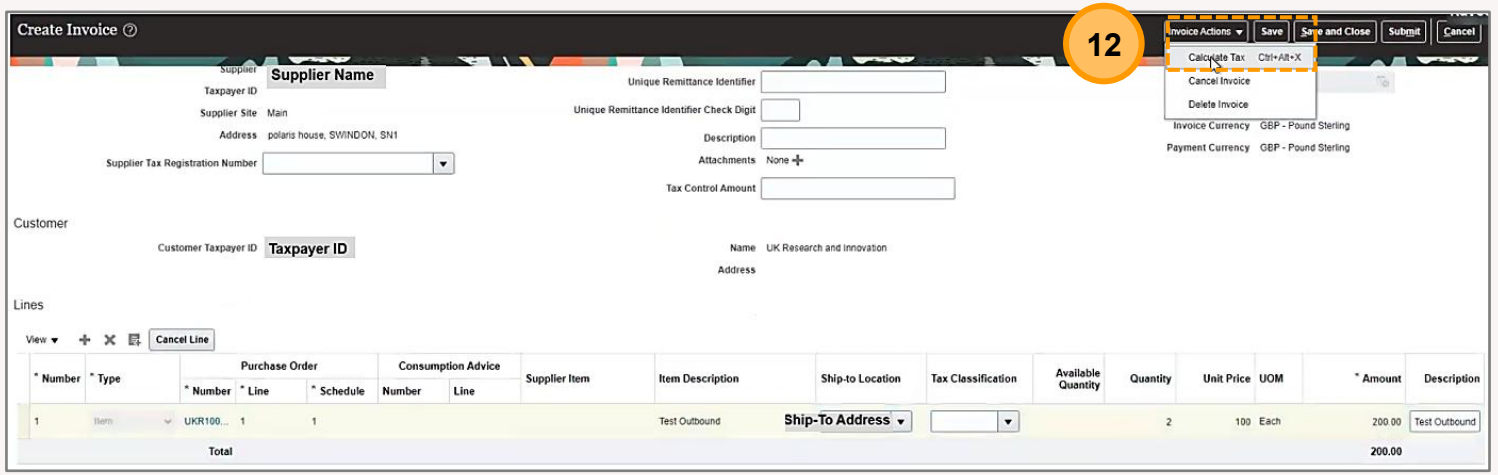
7. Select the **Select and Add** icon.
8. Select the **Purchase Order** the invoice is for.
9. Once completed, select **Apply**.
10. Select **OK**.



Creating invoices (cont'd)

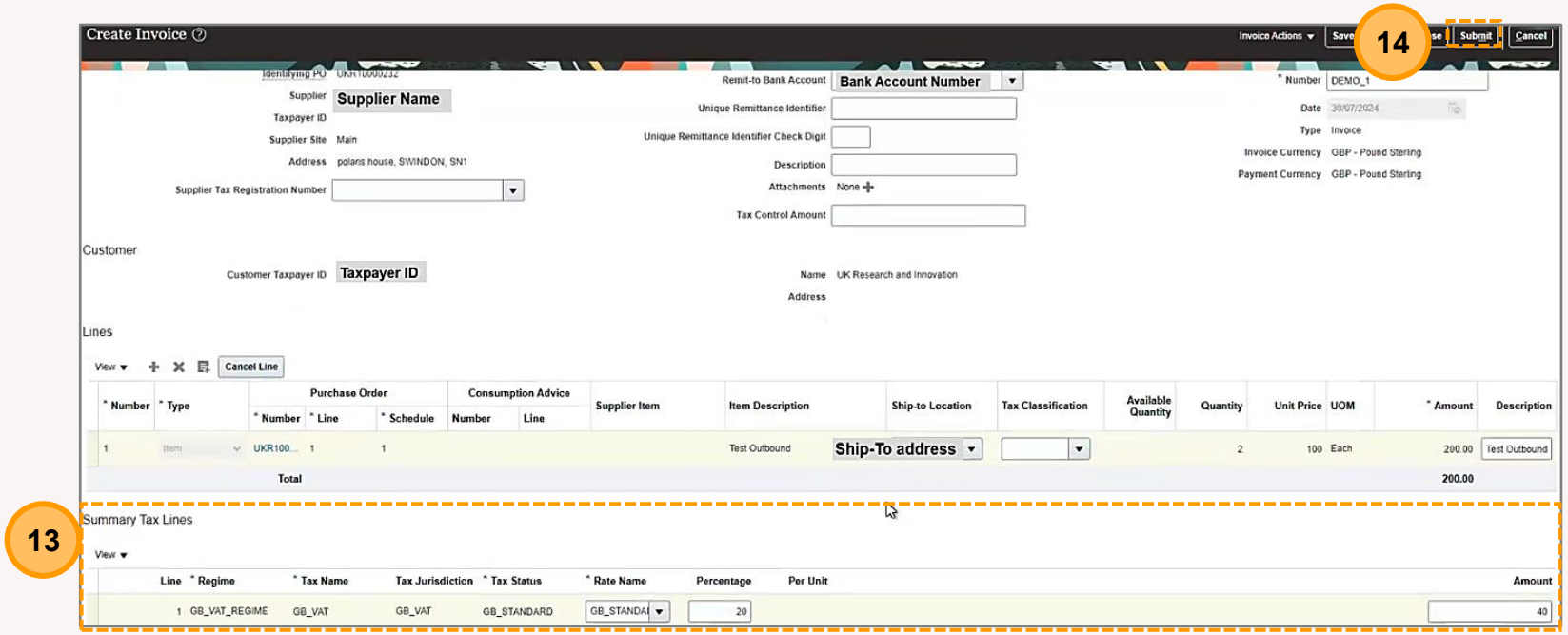
11. Go to the **Lines** section and verify the details are correct. You will be able to edit if required.
12. Select **Calculate Tax** from the **Invoice Actions** dropdown menu.





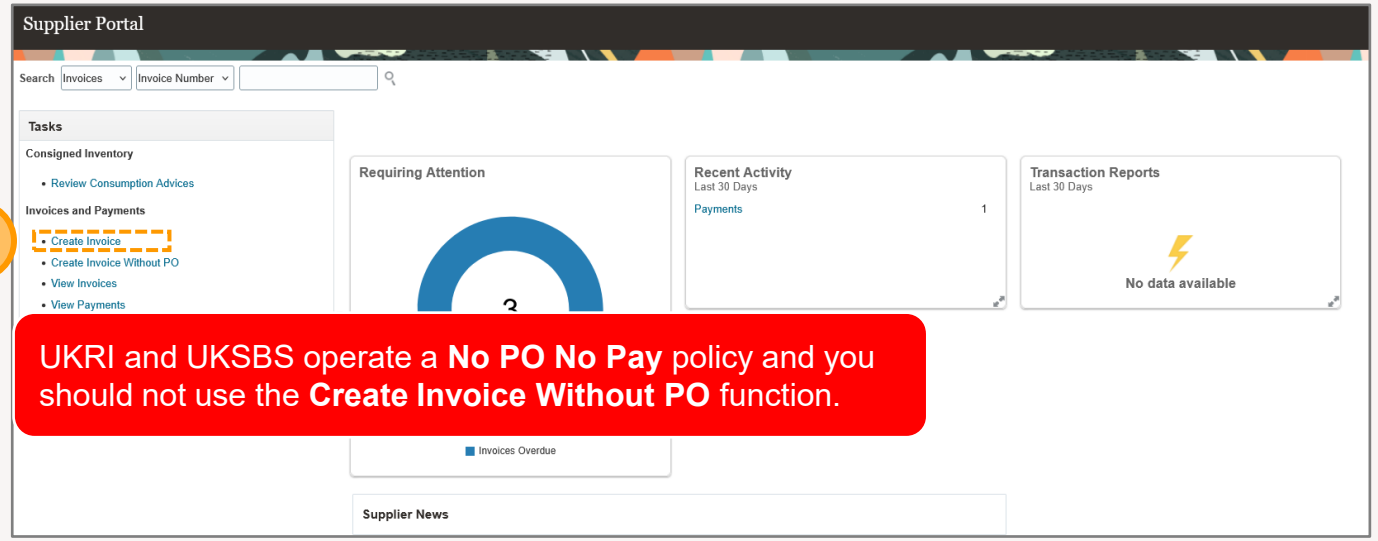
Creating invoices (cont'd)

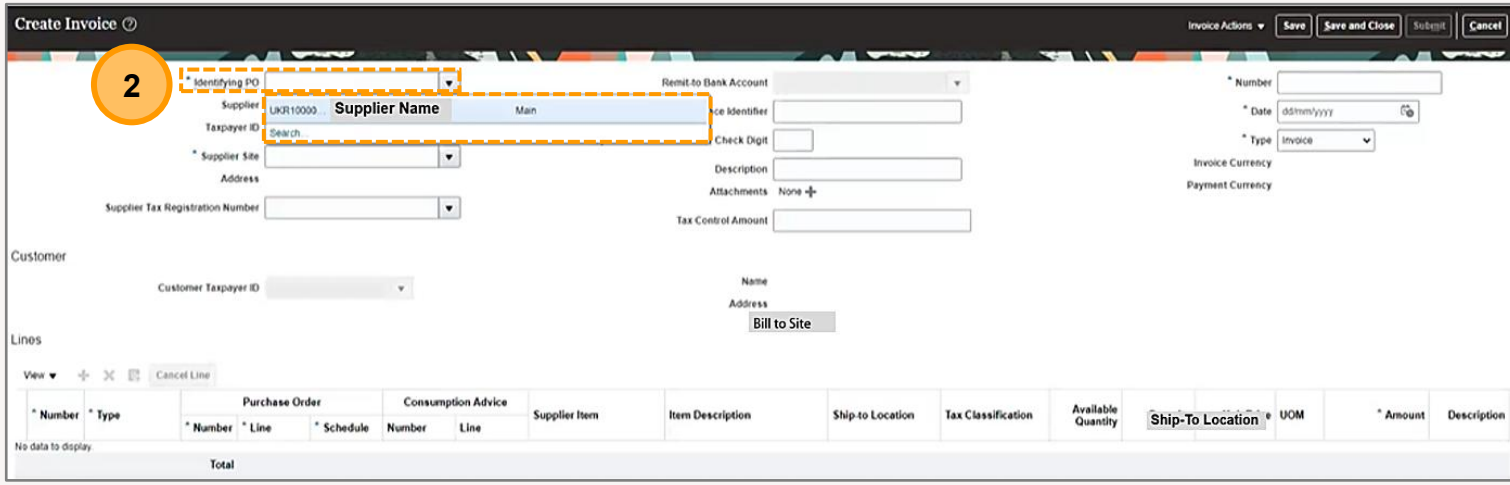
13. Check and amend the **Summary Tax Lines** if required.
14. Once completed, select **Submit**.



Creating a credit note for a Purchase Order

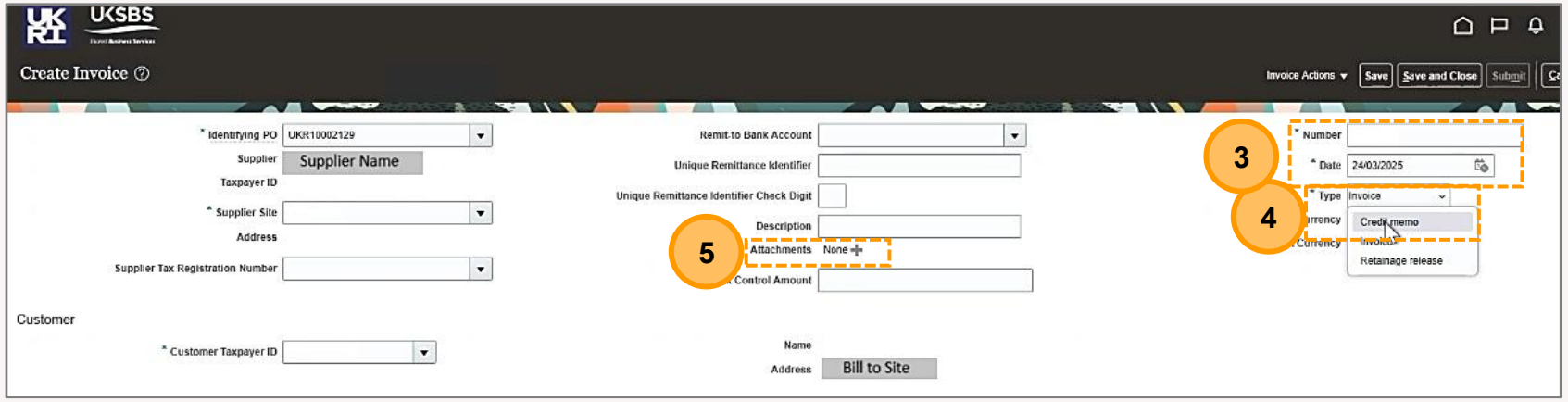
1. Select **Create Invoice** in the **Invoices and Payments** section.
2. Search for or select the Purchase Order from the **Identifying (PO)** field using the dropdown menu.

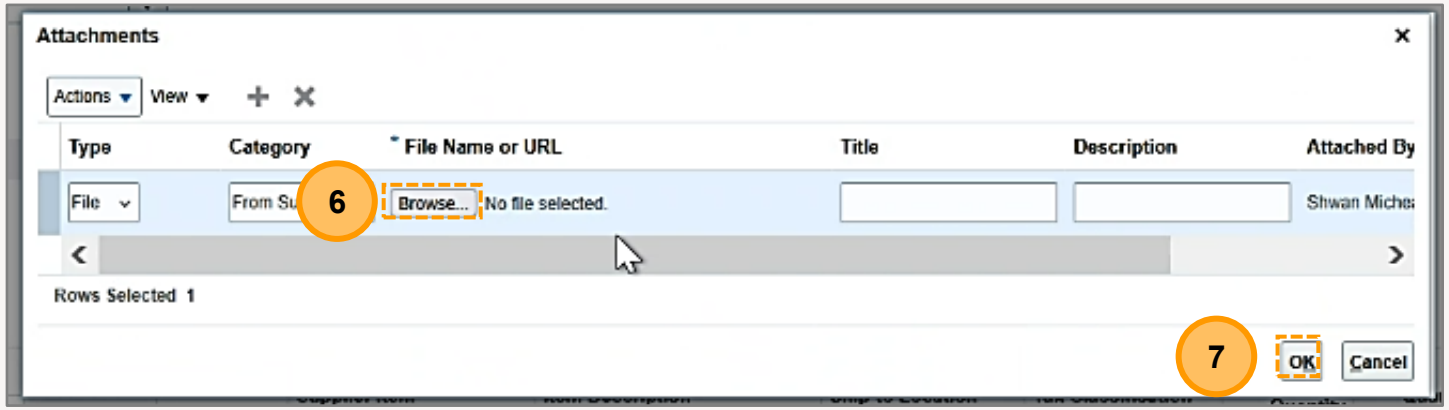




Creating a credit note for a Purchase Order (cont'd)

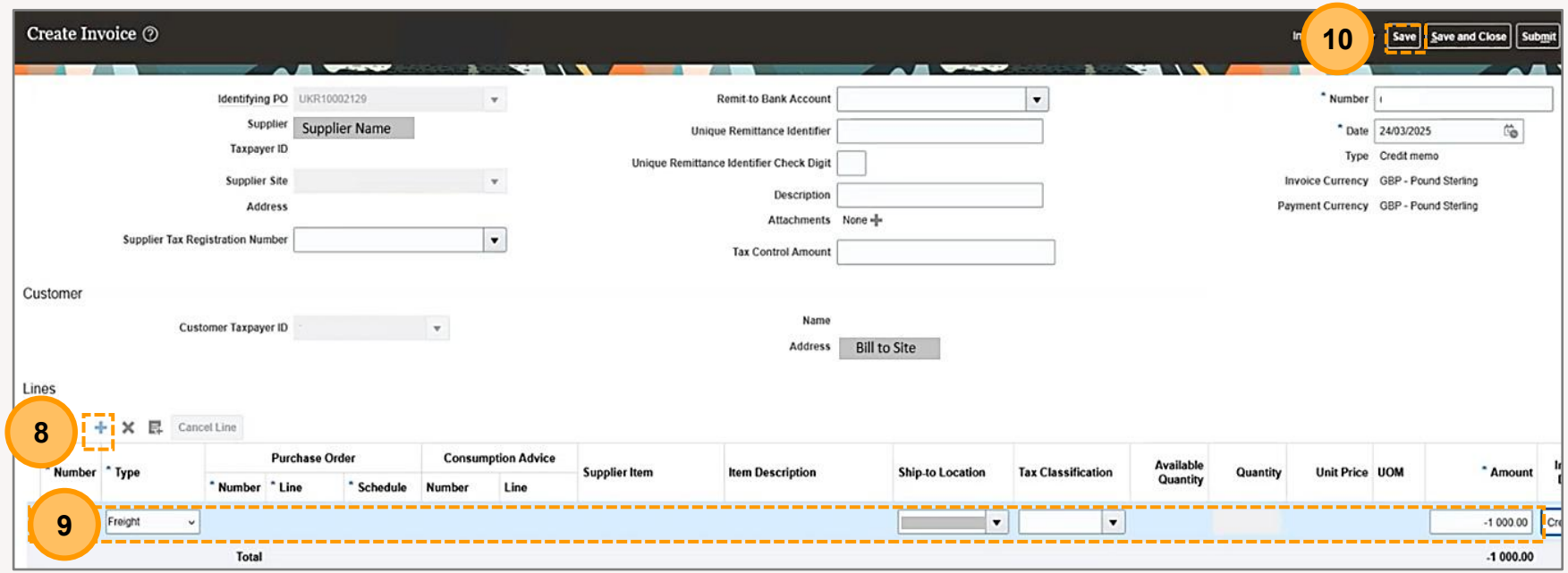
3. Add any additional information including the invoice **Number** and **Date**.
4. Select **Credit memo** from the invoice **Type** dropdown menu.
5. Select **+** to add an **Attachment**.
6. Select **Browse** to locate and attach the required **Attachment**.
7. Once completed, select **OK**.

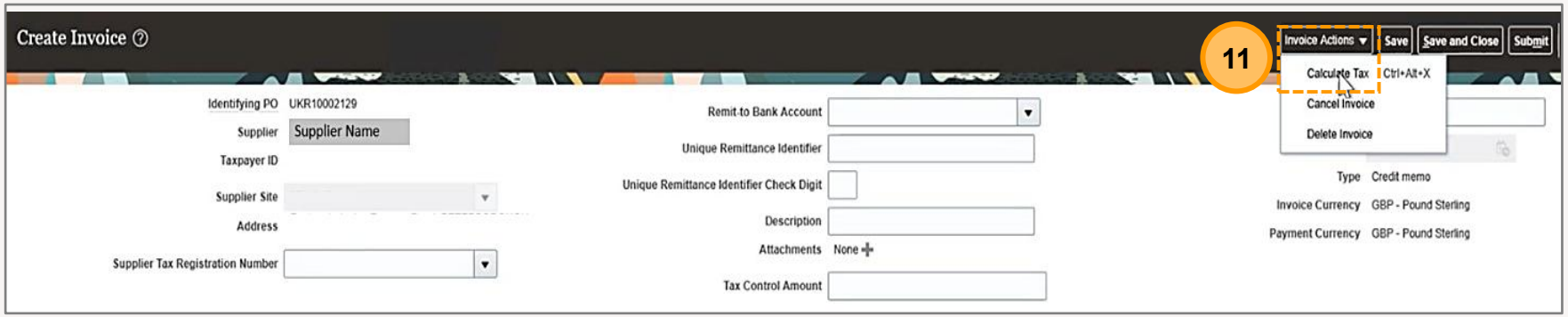




Creating a credit note for a Purchase Order (cont'd)

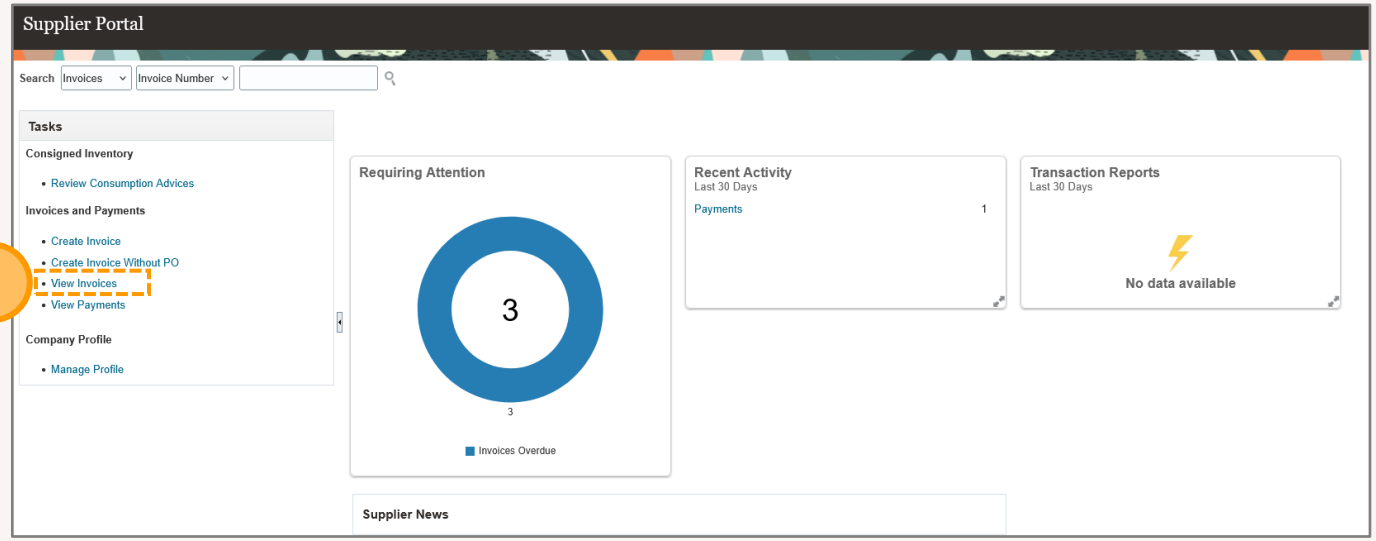
8. Select **+** in the **Lines** section.
9. Select a line **Type**.
10. Once completed, select **Save**.
11. Select **Calculate Tax** from the Invoice **Actions** dropdown menu.

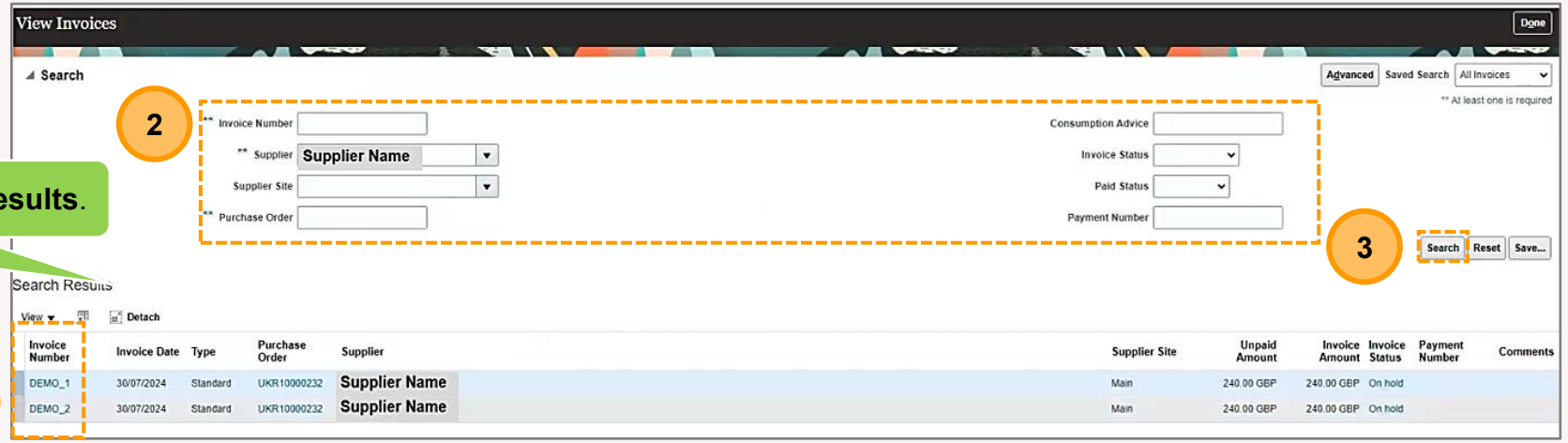




Viewing invoices

1. Select **View Invoices** in the **Invoices and Payments** section.
2. Add the search criteria for the invoice.
3. Once completed, select **Search**.
4. Select the **Invoice Number** hyperlink to view the invoice.





You can check for duplicate invoices in the **Search Results**.

Viewing payments

1. Select **View Payments** in the **Invoices and Payments** section.
2. Add the **Supplier** name and select when displayed in the results.
3. Once completed, select **Search**.
4. Any payments made will show in the **Search Results.**

