

A close-up photograph of a person's eye, looking directly at the camera. The eye is wearing a blue contact lens. The skin around the eye is fair with some freckles. A large, faint, semi-transparent watermark of the Union Jack flag is overlaid diagonally across the entire image. The text 'Wincanton' is centered over the eye in a large, bold, white, italicized sans-serif font.

Wincanton

At the heart of British supply chains

Supplier Portal

Benefits of the Wincanton supplier portal

All Wincanton supplier's are encouraged to register for the supplier portal which allows them to update and maintain their own details.

There are many benefits to the supplier from using the portal and allows the supplier to:

- View purchase orders
- View invoices and associated payment status
- Manage your supplier profile, account and associated details
- Register and manage any additional user accounts as you see appropriate
- Respond to any necessary questionnaires

This training guide provides suppliers with step by step instructions on how to use the portal, after registration. Video demonstration links are on the next slide.

A supplier can register for the Supplier Portal by sending an appropriate single contact name and associated email address to supplier.helpdesk@wincanton-services.com

18 August 2021 - Version V1.0

Essential Transactions

Wincanton Supplier Portal

Wincanton

Contents

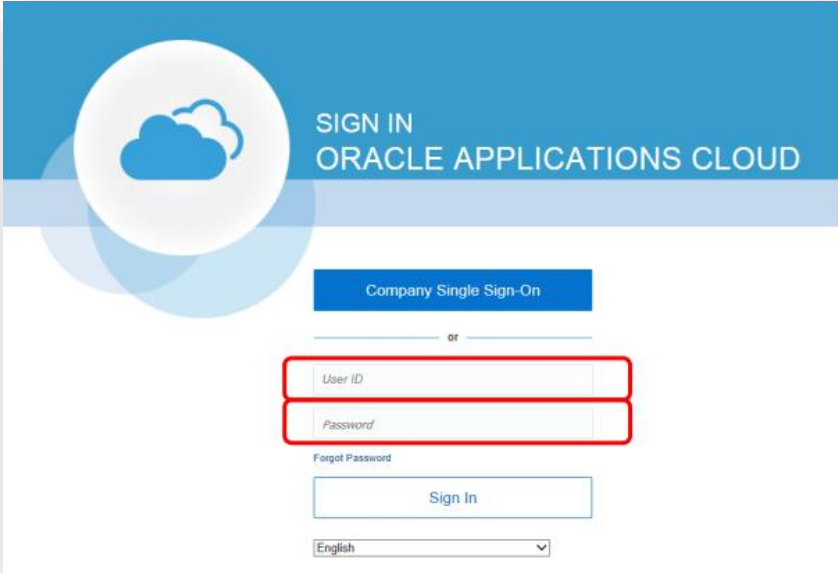
Using these Essential Transactions in the Supplier Portal

Section	Description
Overview of Tasks in the Supplier Portal	How to login with Oracle Applications Cloud - Supplier Portal
	Navigating on the landing page
Orders	Viewing Purchase Orders and Progress
Invoices & Payments	Viewing Invoices and Payments, Payment Details, Reconciling Self Bill Invoices
Managing Profiles	Manage, Submitting Change Requests
	Changing and Updating Company Info
	Changing Addresses
	Adding User Accounts and Administrators
	Changing Bank Details
Demonstration Video - URL links. Click on the title to launch the video	Essential Transactions Managing Profiles

Login With Oracle Applications Cloud - Supplier Portal

After registration, follow these steps

1. Open your email '*Congratulations your Oracle Fusion Applications account has been successfully created*'. Note your username as you will need this to log in each time to Oracle
2. Follow the link to the Oracle Sign on page
3. Type in User ID (username)
4. Click on 'Forgot Password' and then type follow the password reset steps - remember your password!!
5. Log in with this Password

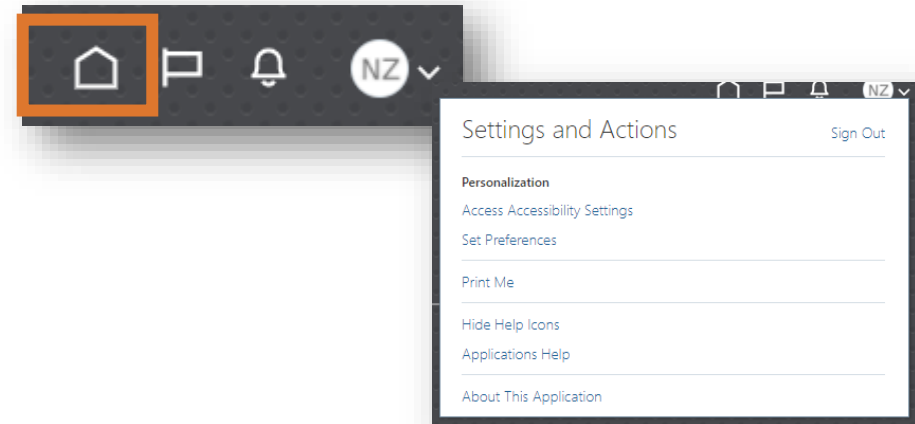
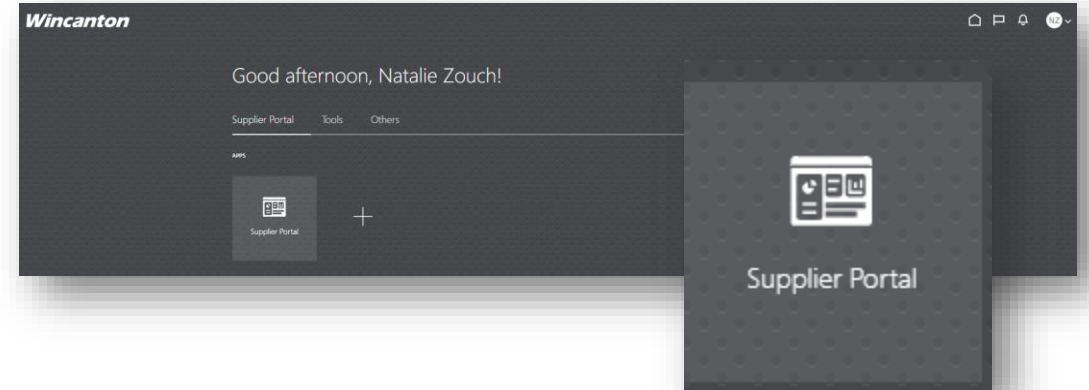


The screenshot shows the Oracle Applications Cloud Sign In page. At the top, there is a blue header with the Oracle cloud logo and the text "SIGN IN ORACLE APPLICATIONS CLOUD". Below the header, there is a blue button labeled "Company Single Sign-On". Underneath this button, there is a small "or" separator. Below the separator, there are two input fields: "User ID" and "Password", both outlined in red. Below the "Password" field, there is a link labeled "Forgot Password". Below the "Forgot Password" link, there is a blue button labeled "Sign In". At the bottom, there is a language dropdown menu currently set to "English".

Home Page

Landing Page

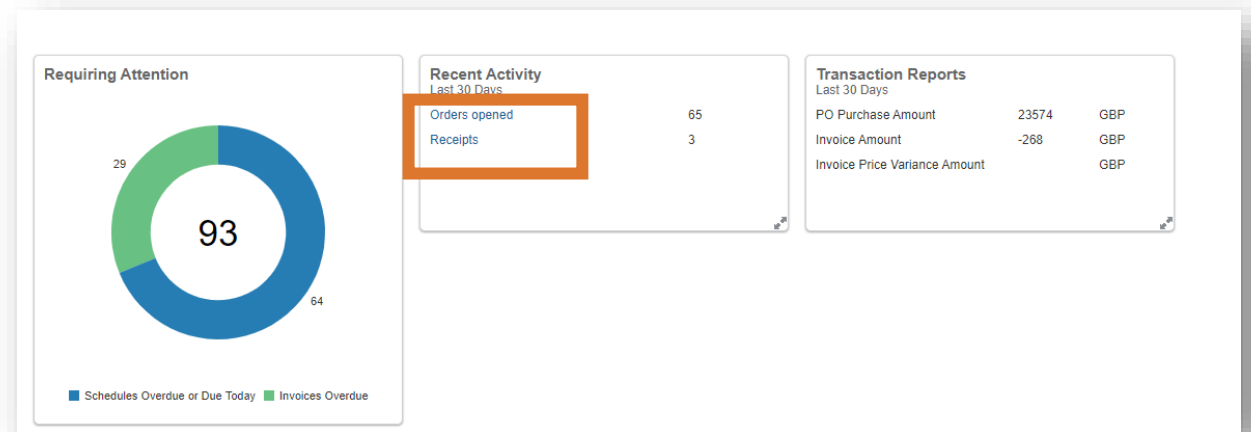
1. This is the landing page, with name and the Supplier Portal infotile, click this to access the Supplier Portal
 1. Update your profile
 2. See invoices
 3. View Purchase Orders
2. The other menus on the top-right of the window are 'home', Watchlist, Notifications and the sign out drop down menu
3. Use the 'Home' icon to return to the landing page at any time, it is always on the top-right of the window



Supplier Portal


Landing Page

1. The Supplier Portal & Infolets
2. The dashboard will identify any required actions and produce a useful shortcut to any recent activity - recent payments for example. All shortcuts are in blue and hyperlinked (hover on the word and click to launch details)
 1. View invoices - search for invoices received and uploaded into Oracle Cloud
 2. View Payment
 3. Manage Profile



Orders

Manage Orders

1. On the 'Task' menu scroll down (use mouse/Page Down/or the grey scroll bar on the right side of the window) to find 'Orders', select the sub menu 'Manage Orders'
2. Click on 'Status' on the right-hand side of the Manage Order window and click on the down arrow. Click on 'Open' and click on 'Search'
3. Use 'Actions' to view the PDF, for example, 'View' to enhance the column details
4. To export the file to Excel, click on the icon 
5. Click on the 'Order' number highlighted in blue, to open the window with this 'Purchase Order' window
6. Click on 'View Details' to view the progress of the order - in a bar chart/progress format
7. To leave the page click on the home icon, or click on 'Done'

[illegible]

Invoices

Viewing Invoices

View invoices - search for invoices received and uploaded into Oracle Cloud

1. On the 'Task' menu scroll down (use mouse/Page Down/or the grey scroll bar on the right side of the window) to find 'Invoices and Payments' and click on the sub menu 'View invoices'
2. Searches can be on 'Invoice Number' or 'Supplier' or 'Purchase Order', type in the number and click on 'Search'
3. To view all invoices received select the down arrow next to 'Supplier', this will identify the supplier. Select 'Search' for all invoices
4. Note: you always need to place a search criteria in the box where a ** is shown
5. To leave the page click on the home icon, or click on 'Done'

Self Bill Invoices will have a ERS or SBA prefix

Invoices and Payments

- Create Invoice
- Create Invoice Without PO
- View Invoices**
- View Payments

View Invoices

Search

Invoice Number

** Supplier

Supplier Site

** Purchase Order

Consumption Advice

Payment Method

Advanced Saved Search All Invoices

** At least one is required

Search Reset Save...

Search Results


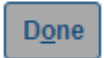
View Detach

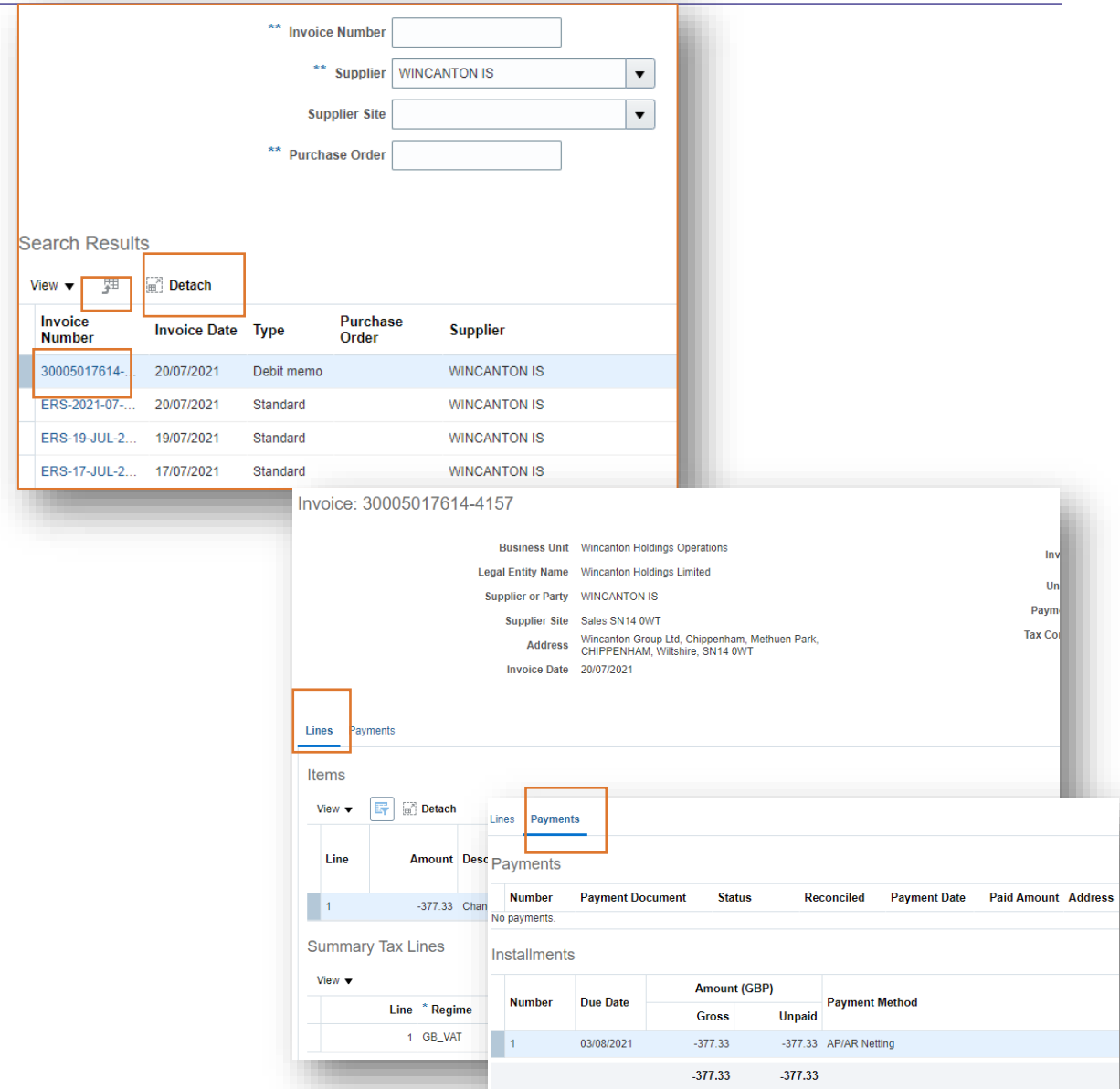
Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status	Pay Num
No search conducted.									
** Invoice Number <input type="text"/>									
** Supplier <input type="text" value="WINCANTON IS"/>									
Supplier Site <input type="text"/>									
** Purchase Order <input type="text"/>									
Search Results									
View <input type="text"/> Detach									
Invoice Number	Invoice Date	Type	Purchase Order	Supplier					
30005017614-...	20/07/2021	Debit memo		WINCANTON IS					
ERS-2021-07-...	20/07/2021	Standard		WINCANTON IS					
ERS-19-JUL-2...	19/07/2021	Standard		WINCANTON IS					
ERS-17-JUL-2...	17/07/2021	Standard		WINCANTON IS					

Done

Invoices

Invoice & Payment Details

1. To export the file to Excel, click on the icon 
2. Expand the view to full screen, click on 'detach' icon
3. Through 'View' you can adjust what you see and the format of the columns
4. Look at the 'Invoice Number' column and click on the invoice number (marked in blue and hyperlinked)
5. The invoice detail includes; invoice copy, invoice description, amount, and purchase order link (this will open a graph the PO value an amount invoiced)
6. The 'Items', 'Summary Tax Lines' and 'Totals' are now visible- scroll down to view more details of the totals
7. Click on the 'Payments' tab to give details of the payments
8. Click 'Done' to return to the previous window 



Search Results

Invoice Number	Invoice Date	Type	Purchase Order	Supplier
30005017614-...	20/07/2021	Debit memo		WINCANTON IS
ERS-2021-07-...	20/07/2021	Standard		WINCANTON IS
ERS-19-JUL-2...	19/07/2021	Standard		WINCANTON IS
ERS-17-JUL-2...	17/07/2021	Standard		WINCANTON IS

Invoice: 30005017614-4157

Business Unit: Wincanton Holdings Operations
 Legal Entity Name: Wincanton Holdings Limited
 Supplier or Party: WINCANTON IS
 Supplier Site: Sales SN14 0WT
 Address: Wincanton Group Ltd, Chippenham, Methuen Park, CHIPPENHAM, Wiltshire, SN14 0WT
 Invoice Date: 20/07/2021

Payments

Line	Amount	Desc
1	-377.33	Chan

Summary Tax Lines

Line	* Regime
1	GB_VAT

Installments

Number	Due Date	Amount (GBP)		Payment Method
		Gross	Unpaid	
1	03/08/2021	-377.33	-377.33	API/AR Netting
		-377.33	-377.33	

Invoices

Creating a Statement of Account

If you want a consolidated view of all your invoices, for a specific date range, then follow these steps

1. Click on 'View Invoices' in the Task list
2. Click on 'Advanced', on the right-hand side of the window
3. Complete the Invoice Number or Supplier or Purchase Order box (marked as **)
4. In the 'Invoice Date' box, select from the list; for a date range select 'between' and enter the dates in dd/mm/yyyy order, for a specific date then select 'Equals' and type in the date
5. The list of invoices will show in the box below
6. Click on the 'export to Excel' icon for your statement, open Excel
7. Click on 'Done' to return to the previous screen

Self Bill Reconciliation

Creating a Statement of Account

The new self bill process generates a self bill per transaction. Therefore, you are empowered to create your own Excel report to view your own self bills statements.

1. Click on 'View Invoices' in the Task list
2. Click on 'Advanced', on the right-hand side of the window
3. In the 'Invoice Number' box type in 'SBA' (this will list all the self bill invoices)
4. In the 'Invoice Date' box, select from the list; for a date range select 'between' and enter the dates in dd/mm/yyyy order, for a specific date then select 'Equals' and type in the date
5. The list of invoices will show in the box below
6. Click on the 'export to Excel' icon for your statement
7. Click on 'Done' to return to the previous window

View Invoices

Search

** Invoice Number Starts with

** Supplier Equals

Supplier Site Equals

** Purchase Order Starts with

Consumption Advice Starts with

Due Date Equals

Done

Basic Saved Search All Invoices

** At least one is required

Invoice Status Equals

Paid Status Equals

Payment Number Equals

Invoice Amount Equals

Invoice Date

Invoice Date Operator

Search Reset Save... Add Fields Reorder

Invoice Status Equals

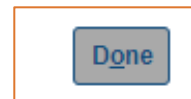
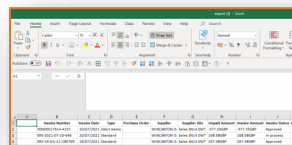
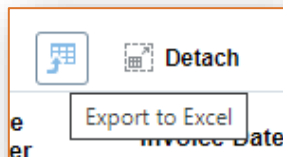
Paid Status Equals

Payment Number Equals

Invoice Amount Equals

Invoice Date Operator

Invoice Date Between -



Payments

Viewing Payments

1. To view payments made in Oracle, select 'View Payments' from the Supplier Portal Page
2. Searches can be made on the basis of any criteria with a **
3. To view all payment made, select the down arrow for 'Supplier'. Select 'Search' to view all payments, 'Reset' to carry out another search
4. Searches can be made for specific 'payment numbers', type in the number in the box provided
5. Similarly to 'view invoices', you can 'export', 'detach' or 'expand' the screen, by clicking on the icons
6. Click on the 'payment numbers' to provide full details, date paid and bank account remit, look at invoice paid details and also the Purchase Order
7. Click 'Done' to return to the previous windows

Invoices and Payments

- Create Invoice
- Create Invoice Without PO
- View Invoices
- View Payments

Search Reset Save...

Wincanton

View Payments

Search

Payment Number

Payment Status

Payment Amount

Supplier

Supplier Site

Search

Payment Date

Search Results

View

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status
No search conducted							

Done

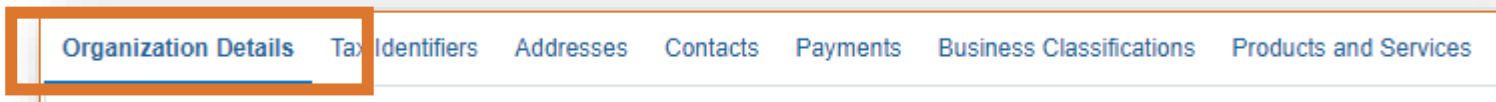
Managing Profile

Editing Your Profile, if things change

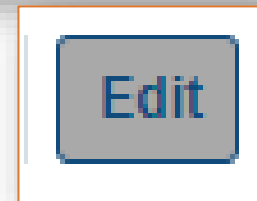
Wincanton

Company Profile

Manage Profile



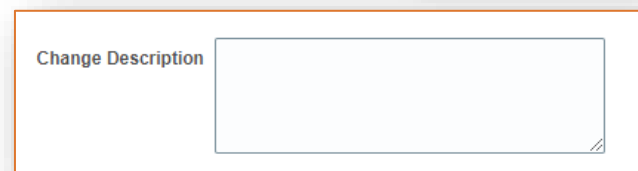
Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services



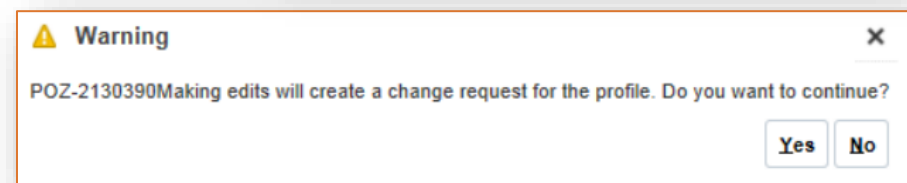
Edit

1. View & edit your profile

1. 'Organizational details'
 2. Tax identifiers (VAT number and VAT type)
 3. Addresses (current address and adding new)
 4. Contacts (those with access to the Portal and your contact details)
 5. Payments - bank accounts with the facility to change
- Wincanton ask you review your profile and update as necessary
 - In the 'Task' bar, scroll and choose 'Company Profile', and the sub menu 'Manage Profile'
 - Clicking on the tabs will open the last entry in 'read only' view
 - Click on the 'Edit' button when you want to make a change
 - Where a change is required you will be required to complete the 'Change Description' box
 - Clicking on 'Save' or 'Save and Close' will generate a 'do you want to continue?' warning - click on 'Yes or No'
 - Click 'Done' to return to the previous windows



Change Description



Warning ×

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

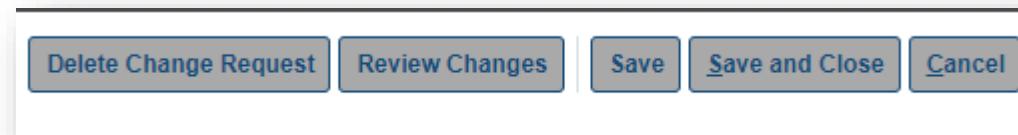
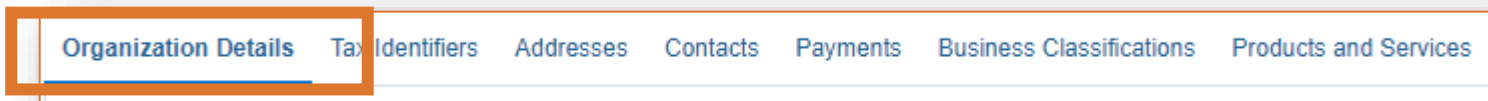
Yes No



Done

Company Profile

Submitting Change Requests

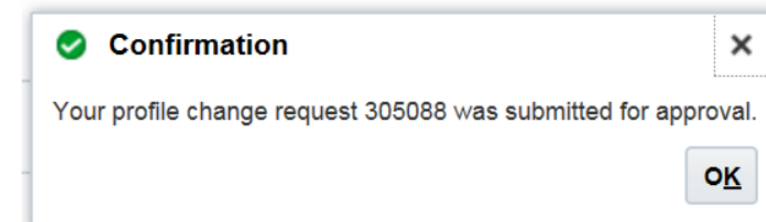


1. These are the following options

- a) 'Delete Change Request' this will cancel the request for change even after it has been submitted (as long as the request is showing 'pending approval')
- b) 'Save' allow you to save the changes in that window before moving to another
- c) 'Save and Close' will save and close the window - this does not SUBMIT



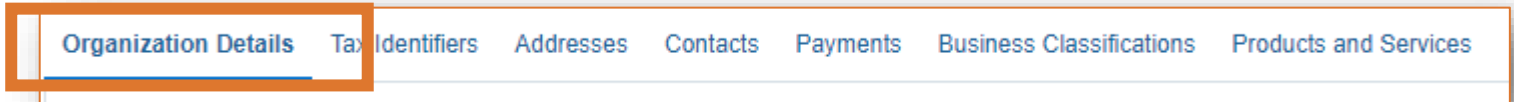
- 1. To SUBMIT a request you need to select 'Review Changes' and then 'Submit'. Though you can 'Edit' and 'Delete' at this stage too
- 2. If the SUBMIT button is not selected the changes to the record will not take place
- 3. Look for the 'Confirmation' message and click on 'OK' to finish
- 4. You can find actions and responses in the 'Worklist', this is an infotile on the landing page under 'Tools'



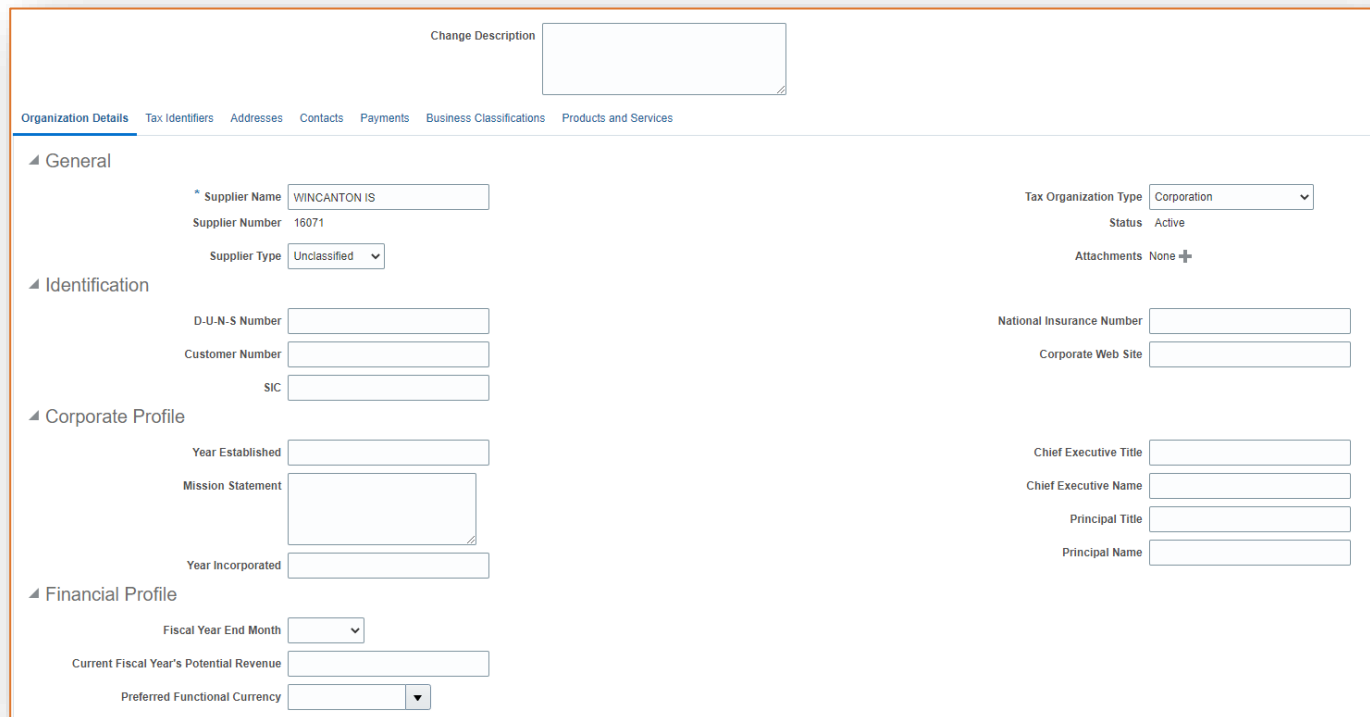
Organisation Details

Changes

1. Click on the 'Organisation' tab
2. Read through the current details and click on 'Edit'
3. Complete the boxes as required
4. Click on + if you need to add an attachment
5. Follow the 'Submitting Change Request' process to 'Save' and/or 'Review Changes' etc
6. Remember to complete the 'Change Description Box'



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



Change Description

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

General

* Supplier Name WINCANTON IS

Supplier Number 16071

Supplier Type Unclassified

Tax Organization Type Corporation

Status Active

Attachments None

Identification

D-U-N-S Number

Customer Number

SIC

Corporate Profile

Year Established

Mission Statement

Year Incorporated

Financial Profile

Fiscal Year End Month

Current Fiscal Year's Potential Revenue

Preferred Functional Currency

National Insurance Number

Corporate Web Site

Chief Executive Title

Chief Executive Name

Principal Title

Principal Name

Addresses

Changes

1. Click on the 'Addresses' tab
2. Read through the current details and click on the address name in blue
3. Complete the boxes as required
4. Click on 'OK' when finished, 'Cancel' if finished or the 'X' to close the window
5. To add an address then click on the '+' button
6. To view all columns, click on 'View', 'Columns' then tick or untick from the list
7. If an existing site is not longer required, (eg you have moved) do not change the existing site, but place an 'inactive' date in the box provided. Then choose '+' in point 4, for a new address
8. Follow the 'Submitting Change Request' process to 'Save' and/or 'Review Changes' etc
9. Remember to complete the 'Change Description Box'

The image displays three screenshots of the Wincanton system interface, illustrating the process of managing addresses.

Top Screenshot: Shows the main navigation bar with tabs: Organization Details, Tax Identifiers, **Addresses** (highlighted with an orange box), Contacts, Payments, Business Classifications, and Products and Services.

Middle Screenshot: Shows the 'Addresses' tab interface. It includes a table with columns 'Address Name' and 'Address'. The first row shows 'SN14 0WT'. Below the table, it says 'Columns Hidden 3'. Above the table, there are controls for 'Actions', 'View', 'Format', a '+' button (highlighted with an orange box), a pencil icon, 'Status' (set to 'Active'), 'Freeze', and 'Wrap'.

Bottom Screenshot: Shows the 'Edit Address: SN14 0WT' form. It contains fields for:

- * Address Name: SN14 0WT
- * Country: United Kingdom
- * Address Line 1: Wincanton Group Ltd
- Address Line 2: Chippenham
- Address Line 3: Methuen Park
- * City or Town: Chippenham
- County: Wiltshire
- Postcode: SN14 0WT
- Language: (dropdown)
- * Address: ☒ Ordering
- Purpose: ☒ Remit to
- ☐ RFQ or Bidding
- Phone: (dropdown) 01249 710458
- Fax: (dropdown)
- Inactive Date: dd/mm/yyyy (highlighted with an orange box)
- Status: Active

 At the bottom right are 'OK' and 'Cancel' buttons.

Bottom Left Screenshot: Shows the 'View' dropdown menu. The 'Columns' option is selected, opening a list of columns to toggle:

- Refresh
- About This Record
- Columns: ☒ Show All
- Freeze
- Sort
- Reorder Columns...
- ☐ Inactive Date
- ☒ Status
- ☐ Email
- ☒ Fax
- ☒ Address Purpose
- ☒ Phone
- ☐ Country
- ☒ Address
- ☒ Address Name
- Manage Columns...

Contacts

Changes

Note

- An Administrative Contact will receive all system communications
- User Account, if this has a green tick, then access to the system has been provided. Each user accessing Oracle Cloud has a unique user name and password
- Click on 'Contact' tab
- You can use the 'View' button to add columns and + or - to add or remove users

ADDING USERS

1. To add a contact, click on '+', all boxes with a * are mandatory
2. Click in the box whether the user is an 'administrative contact' - this means they can add users, rather than a user account permissions
3. To 'Request' a User Account click in the box provided
4. All users have all 'roles' which are listed. To remove one or more 'roles', click on 'X'. Click on 'Create Another' or 'OK'
5. Remember to complete the 'Change Description Box'

EDITING USERS

1. Click on the User's name in blue to 'Edit Contact', complete the boxes as appropriate.
2. You can make their status 'active' or 'inactive', if you no longer want them to be a user

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

Organization Details Tax Identifiers Addresses **Contacts** Payments

Actions View Format + ✎ ✕ Status Active

Create Contact

Salutation Phone

* First Name Mobile

Middle Name Fax

* Last Name Email

Status Active

☐ Administrative contact

Contact Addresses

Actions View Format ✎ ✕ Freeze Detach Wrap

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

User Account

☐ Request user account

Roles Data Access

User Account

☒ E-mail is required when requesting a user account

Roles Data Access

Actions View Format ✎ ✕ Freeze Detach Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include...

Create Another OK Cancel

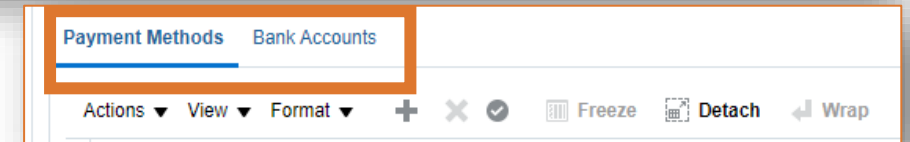
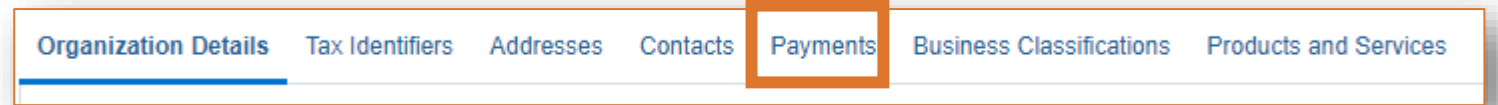
Payments

Changes

You can change the Company's bank details directly into Oracle. It is the suppliers responsibility to use the portal to update any bank details in a timely and accurate manner

1. Select the 'Payments' tab
2. There are two tabs 'Payment Methods' and 'Bank Accounts'
3. To change the 'Payment Method', select the method by clicking on the method name (eg BACs) and complete the 'from' and 'to' date
4. Follow the 'Submitting Change Request' process to 'Save' and/or 'Review Changes' etc
5. Remember to complete the 'Change Description Box'

1. Select the 'Bank Accounts' tab
2. Click on '+' to create a new account, all the *mandatory fields need to be completed
3. 'Bank Name' is selected from a drop down menu
4. Click on 'Create Another', 'OK' or 'Cancel'
5. Follow the 'Submitting Change Request' process to 'Save' and/or 'Review Changes' etc
6. Remember to complete the 'Change Description Box'



 A screenshot of the Oracle 'Create Bank Account' form. The form is titled 'Create Bank Account' and includes a sub-header 'No data to display'. The form contains several fields: 'Country' (dropdown), 'Account Number' (text), 'Bank Name' (dropdown), 'Bank Branch' (dropdown), 'From Date' (18/08/2021), 'Inactive On' (dd/mm/yyyy), 'IBAN' (text), 'Currency' (dropdown), 'Check Digits' (text), 'Account Type' (dropdown), and 'Description' (text). There are also checkboxes for 'Allow international payments' and 'Additional Information'. At the bottom right, there are buttons for 'Create Another', 'OK', and 'Cancel'. The '+' icon in the navigation bar is highlighted with an orange box.

Appendices

Hints and Tips
Watchlist
Worklist


Contact Us

Should you have any questions then please contact our dedicated supplier helpdesk:

Email - supplier.helpdesk@wincanton-services.com. Telephone - 0844 736 2412 (UK). Open 8:30am to 5:00pm

Monday to Friday (excluding bank holidays)

Hints & Tips

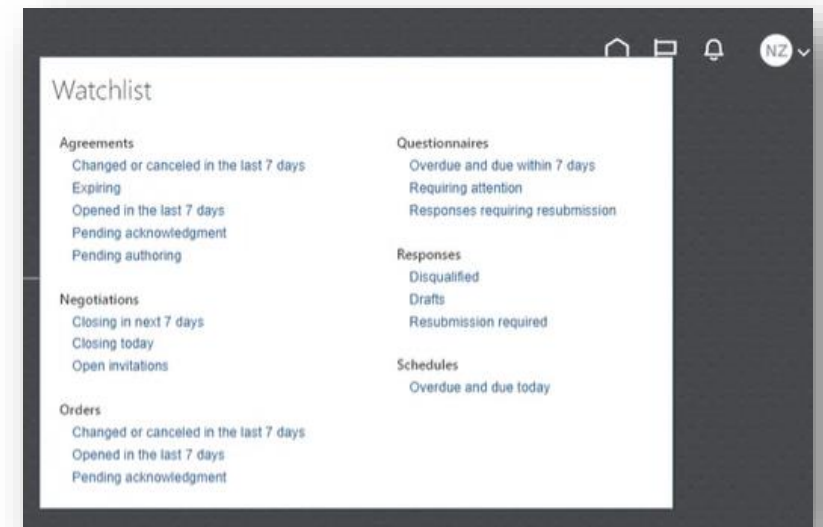
- All items can be exported into Microsoft Excel - look for the Excel Icon 
- Oracle Cloud can be accessed 24/7, using Google Chrome or Microsoft Edge on any mobile device
- Add additional 'Contacts' to access the Portal in 'Manage Profile'
- Keep Wincanton updated with changes of address etc in 'Manage Profile'
- Changes are made instantly in Oracle Cloud

Watchlist

Accessing the Watchlist - click on 'Flag'

Click on any of the blue titles for information: -

- 'Agreements' (between Wincanton and the Supplier),
- 'Negotiations' (RFP, open/closed),
- 'Orders' (Purchase Orders),
- 'Questionnaires' (initiatives/renew their self bill/insurances/service level agreements etc)

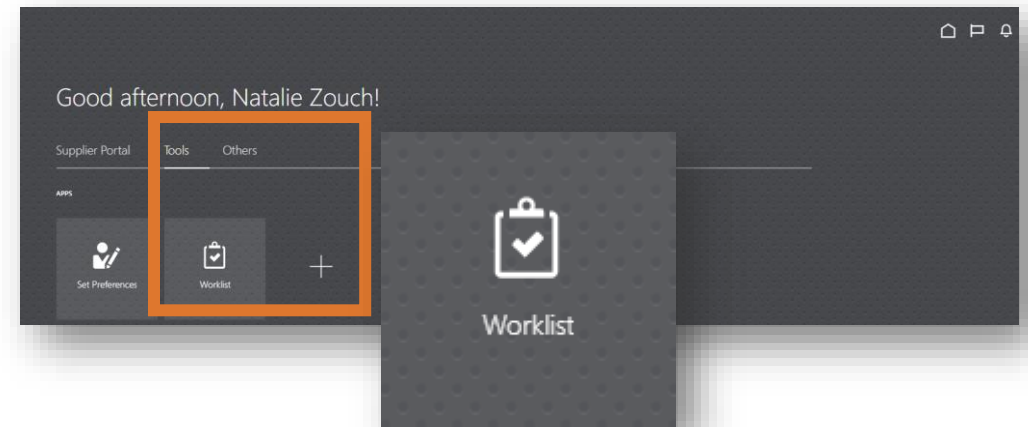


Worklists

Accessing and Using Worklists

Access Worklist by using the bell icon on the landing page or select Tools Tab and then Worklist Infotile

- Your latest changes and responses from Wincanton are held in this Infotile/Bell icon



Worklist: Notifications and Approvals ?

My Tasks ▼	Actions ▼	View ▼	🔍	Assigned ▼	<	>	🔄
Title	State	From User	Assigned				
Supplier Contact User Account for Wincanton was Created	Assigned		18/08/2021 06:32				