
Wincanton
At the heart of British supply chains

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# 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

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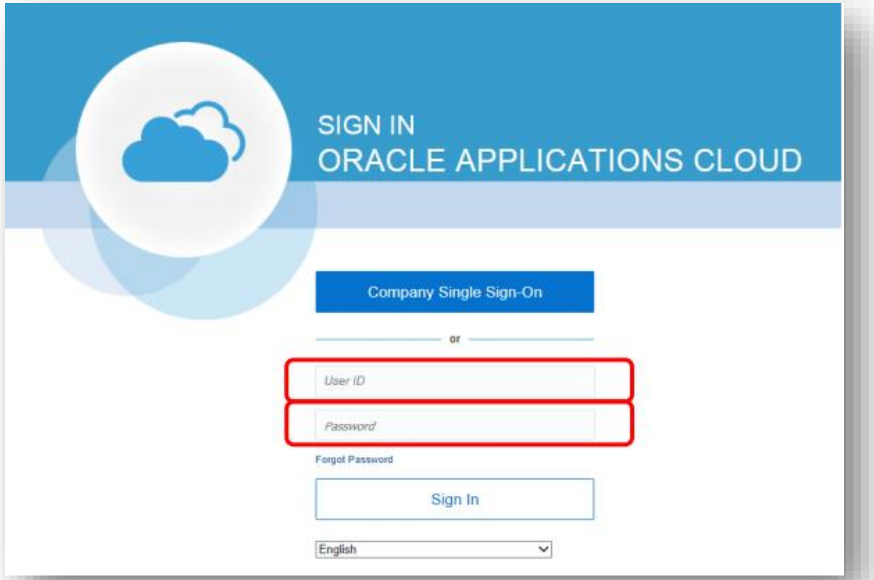
# Contents

## Using these Essential Transactions in the Supplier Portal

# 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



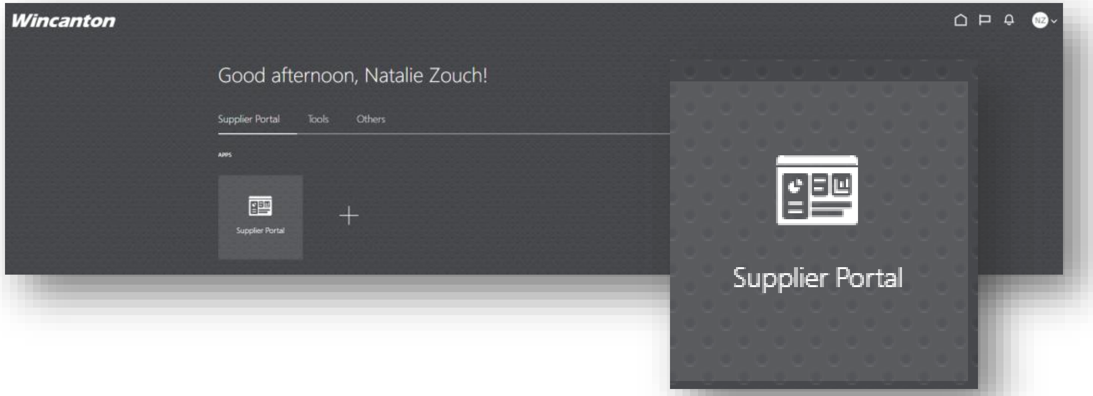
# Home Page

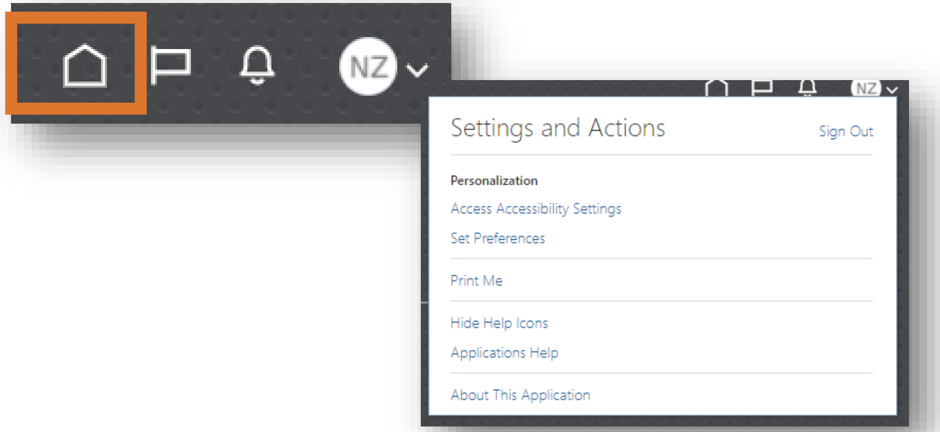
## Landing Page

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



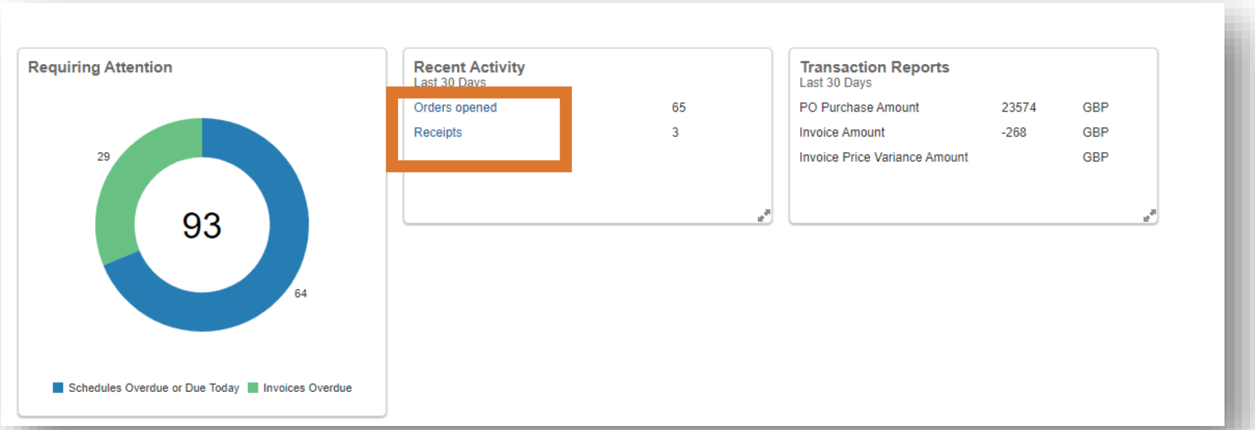



# Supplier Portal

## Landing Page

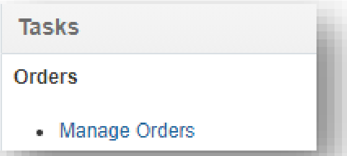
1. The Supplier Portal & Infolets

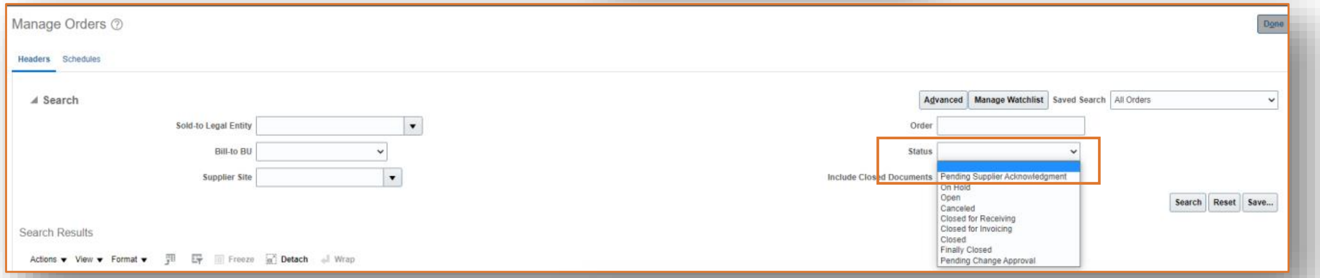
2. The dashboard will identify any required actions and produce a useful shortcut to any recent activity – recent payments for example. All shortcuts are in blue and hyperlinked (hover on the word and click to launch details)
   1. View invoices – search for invoices received and uploaded into Oracle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



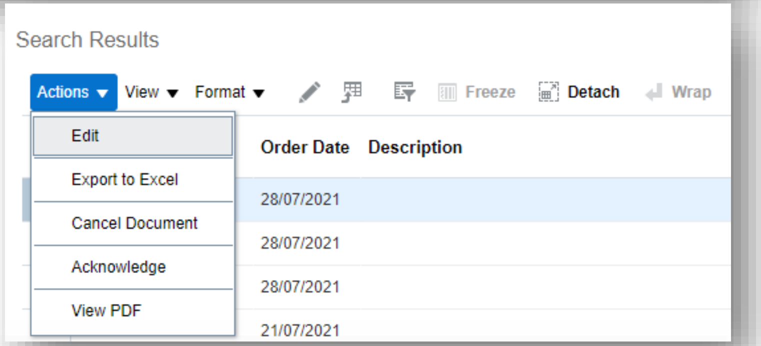
# Orders

## Manage Orders

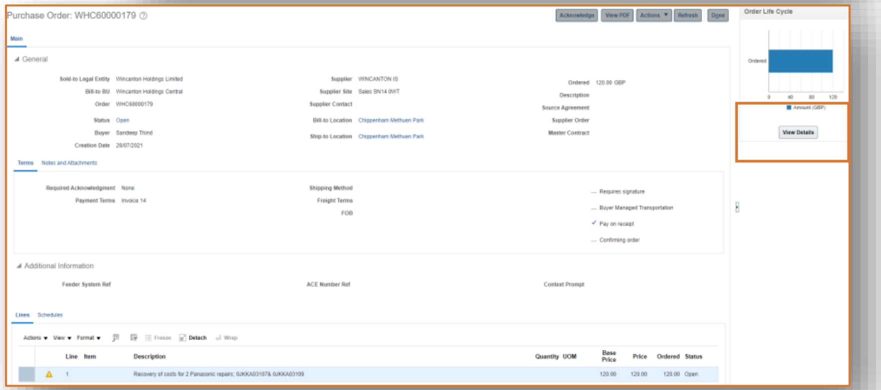



1. On the ‘Task’ menu scroll down (use mouse/Page Down/or the grey scroll bar on the right side of the window) to find ‘Orders’, select the sub menu ‘Manage Orders’




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’

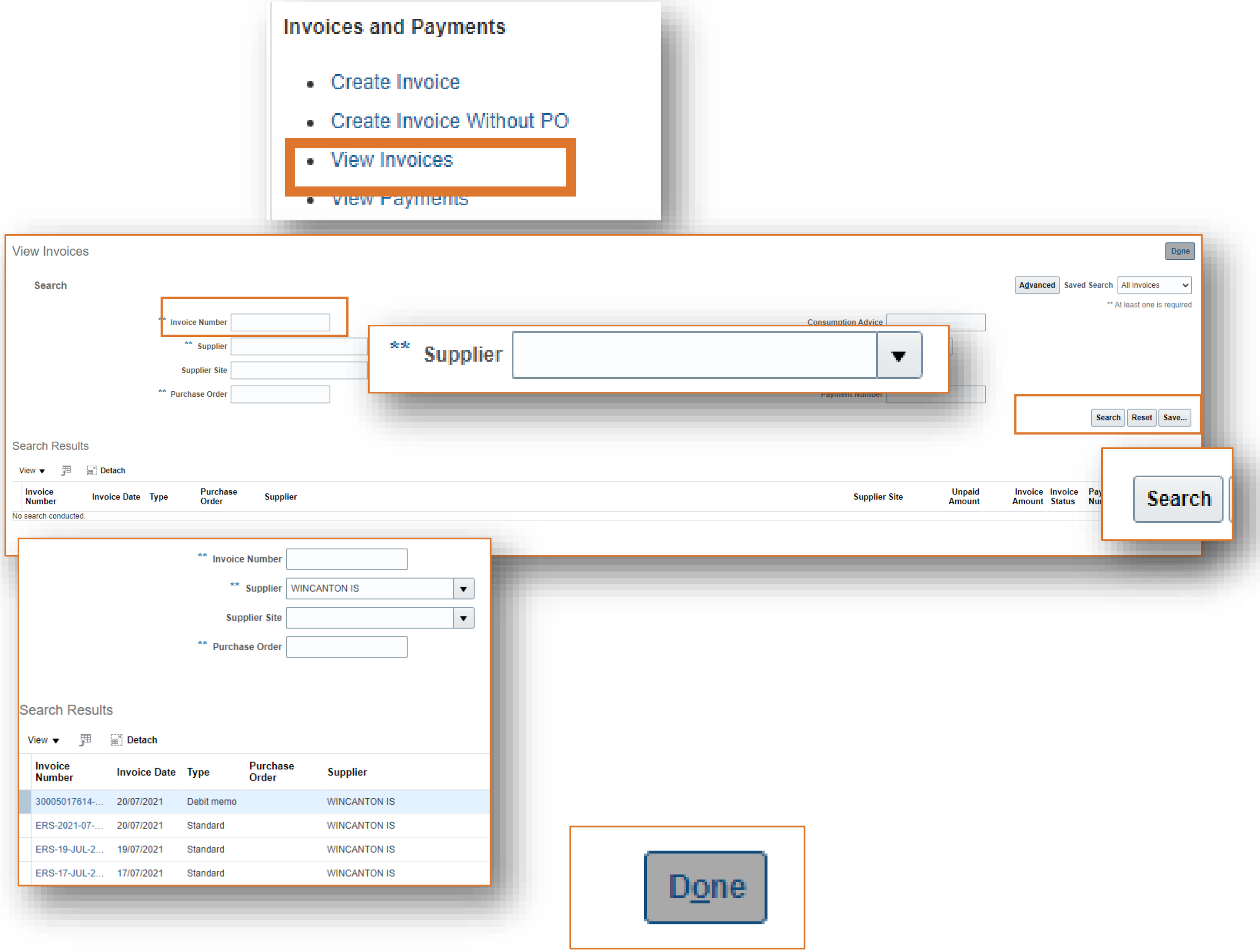
# Invoices

## 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*



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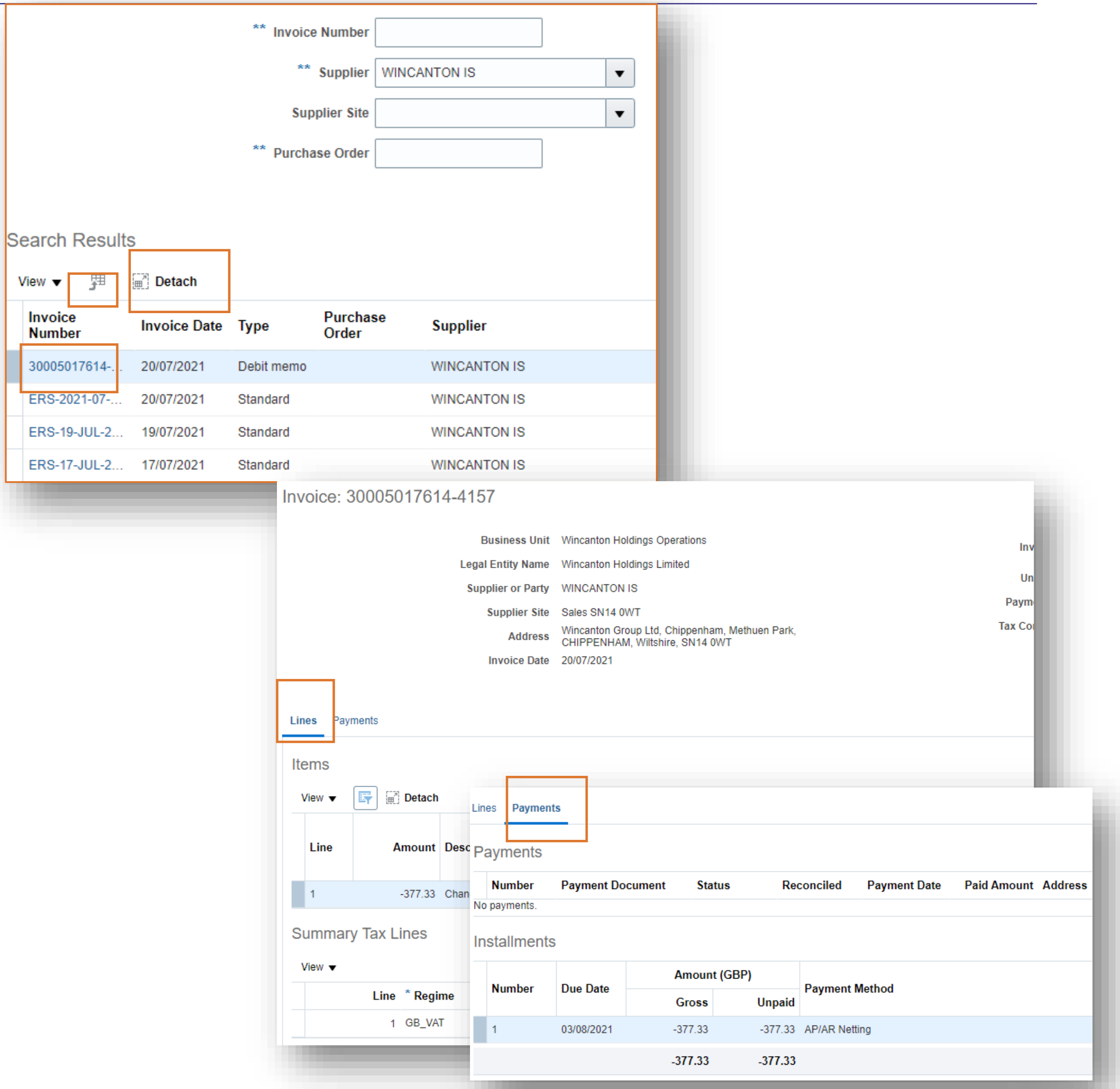
# Invoices

## 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 

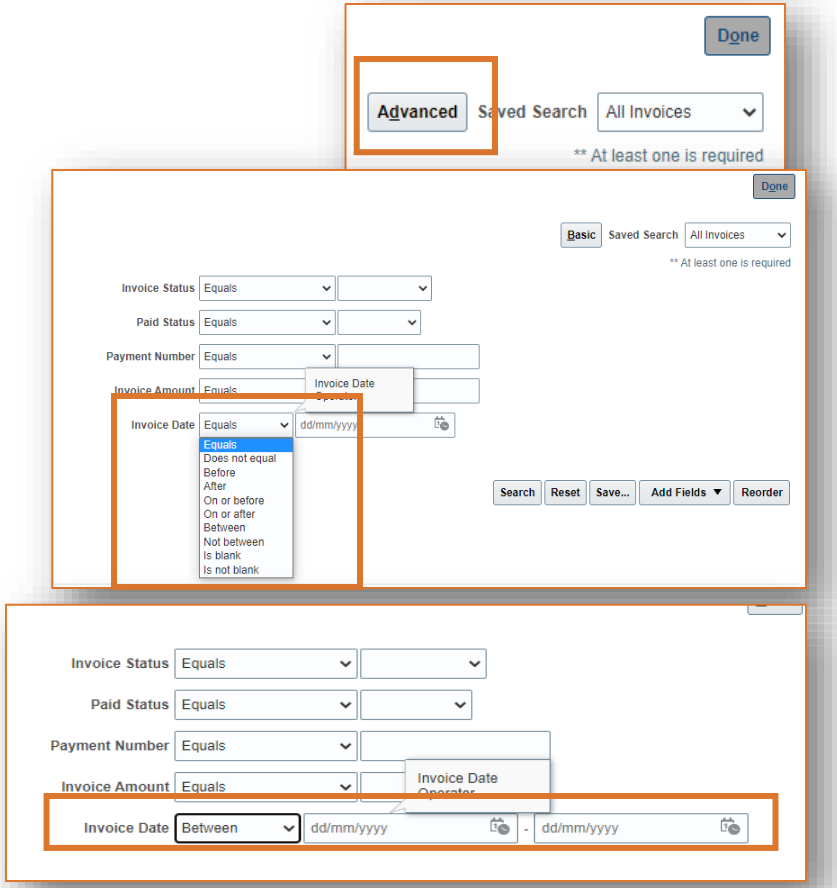



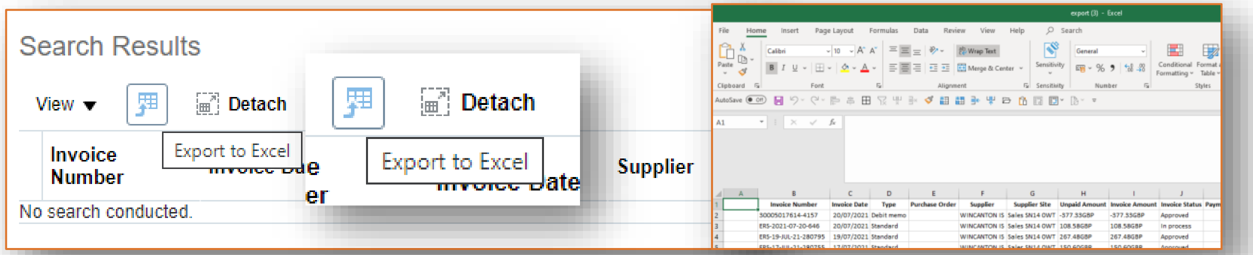
# Invoices

## 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

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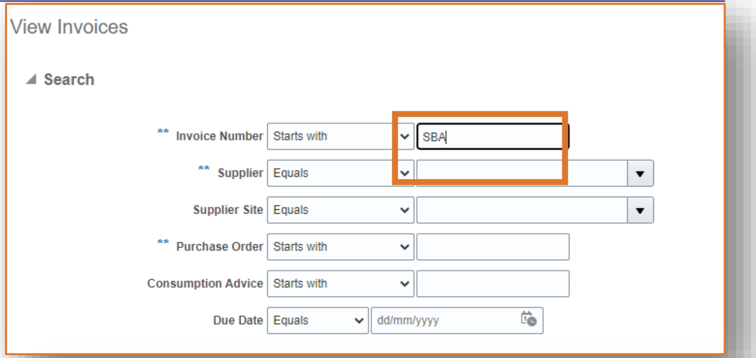
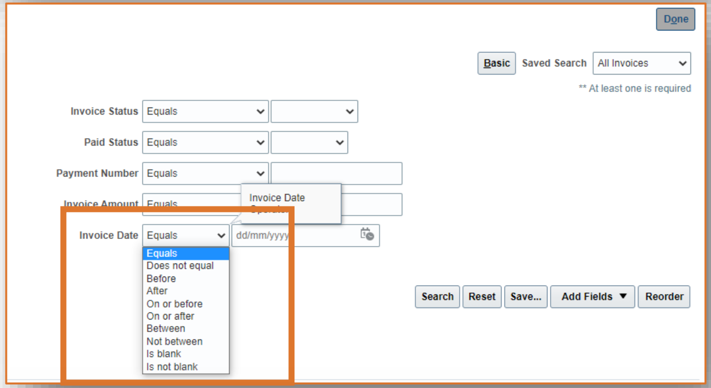
# Self Bill Reconciliation

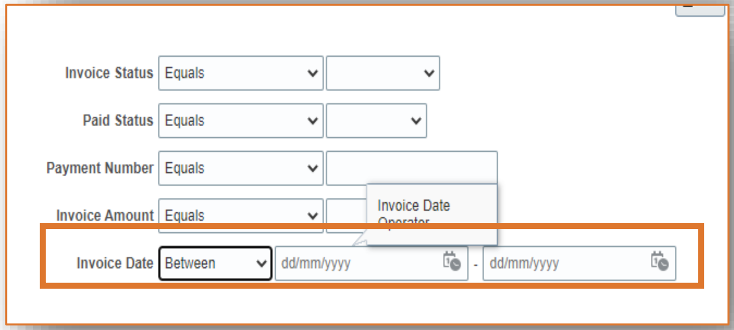
## Creating a Statement of Account

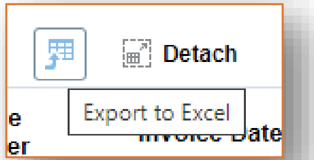
The new self bill process generates a self bill per transaction. Therefore, you are empowered to create your own Excel report to view your own self bills statements.

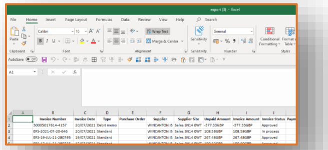
1. Click on ‘View Invoices’ in the Task list
2. Click on ‘Advanced’, on the right-hand side of the window
3. In the ‘Invoice Number’ box type in ‘SBA’ (this will list all the self bill invoices)
4. In the ‘Invoice Date’ box, select from the list; for a date range select ‘between’ and enter the dates 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



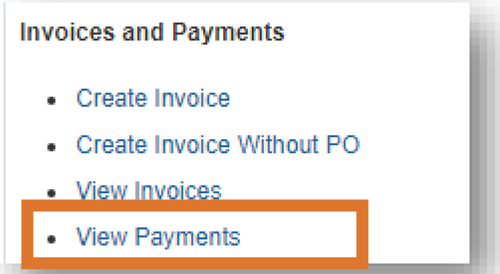



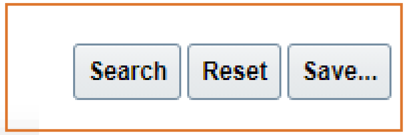
# Payments

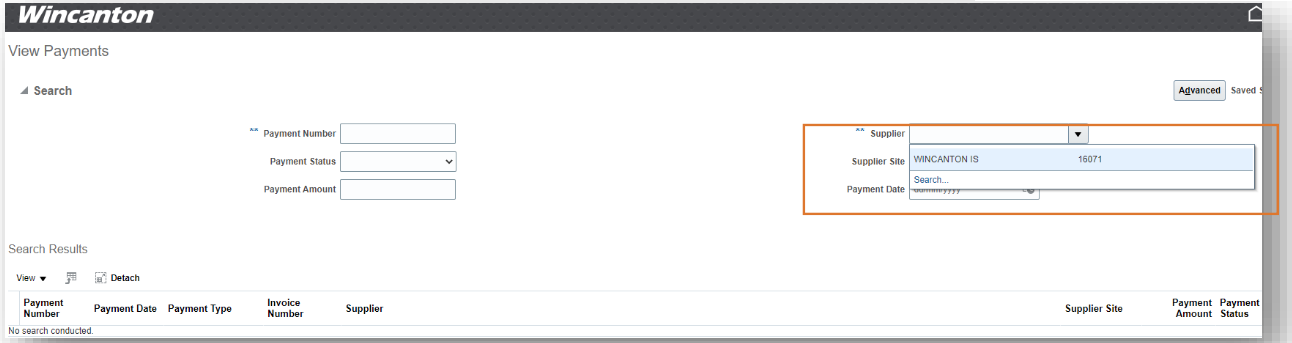
## Viewing Payments

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




# Managing Profile

## Editing Your Profile, if things change

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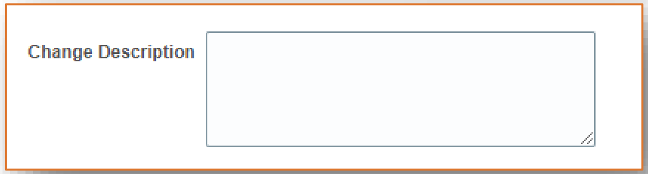
# Company Profile

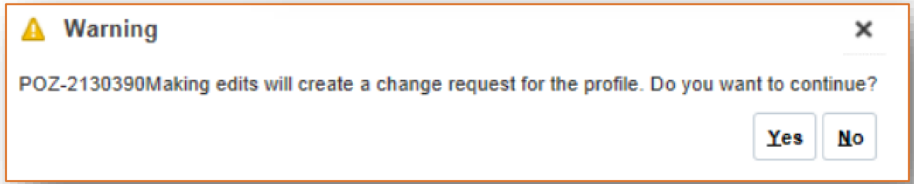

## Manage Profile


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

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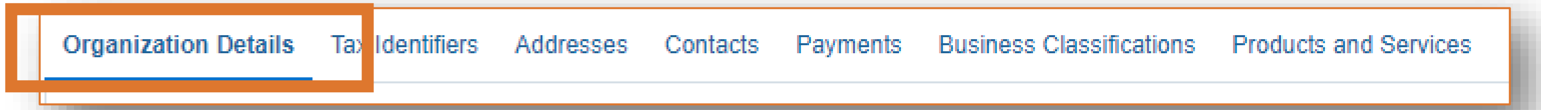
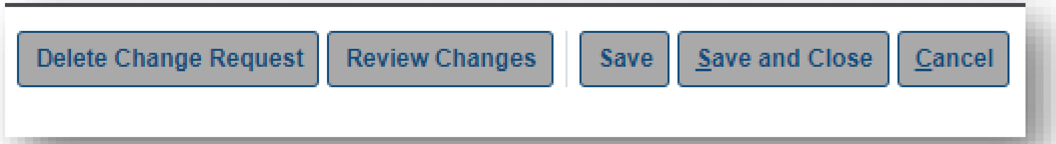
# Company Profile




## Submitting Change Requests

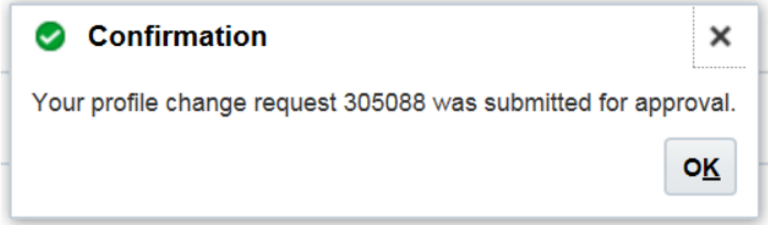



1. These are the following options

   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’



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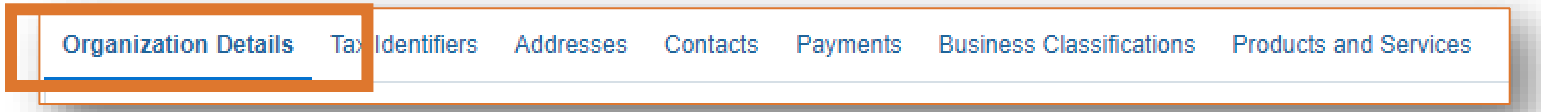
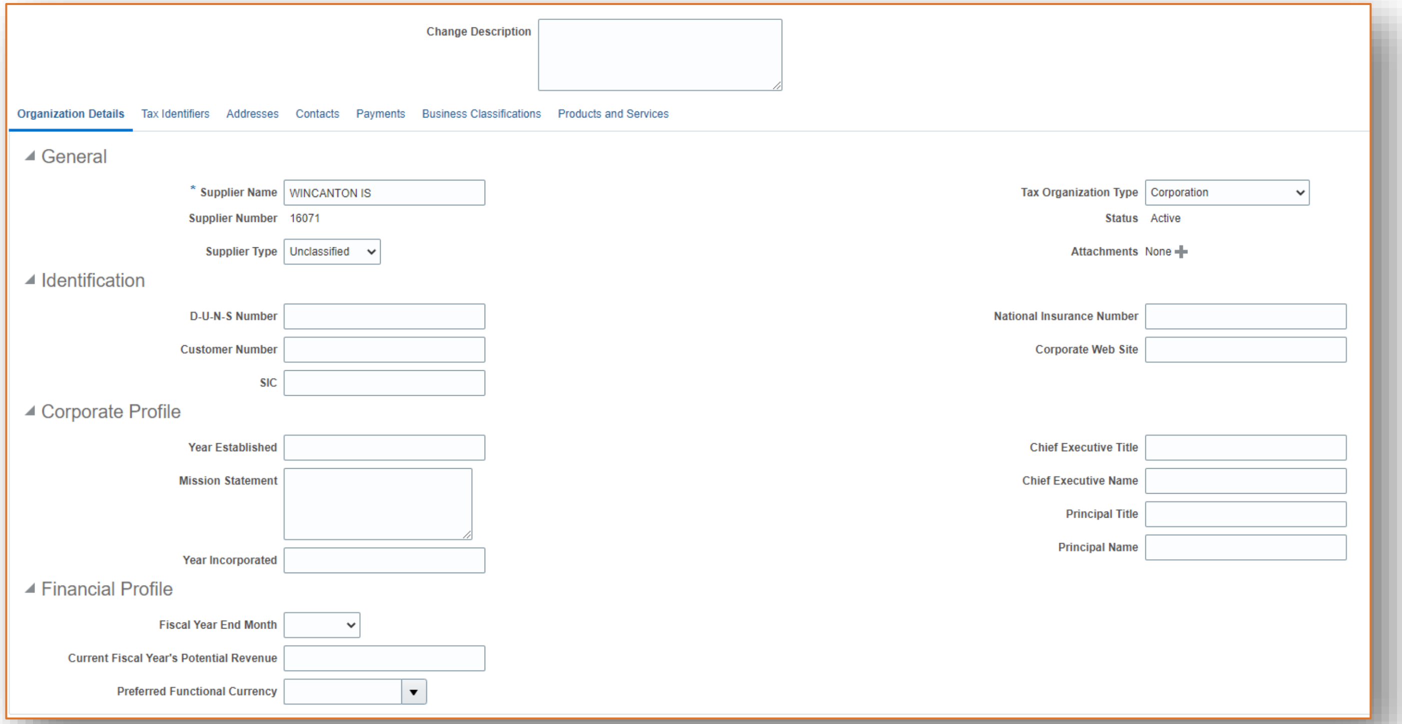
# Organisation Details




## 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’



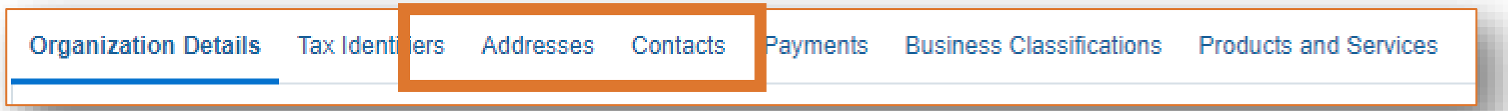
# Addresses

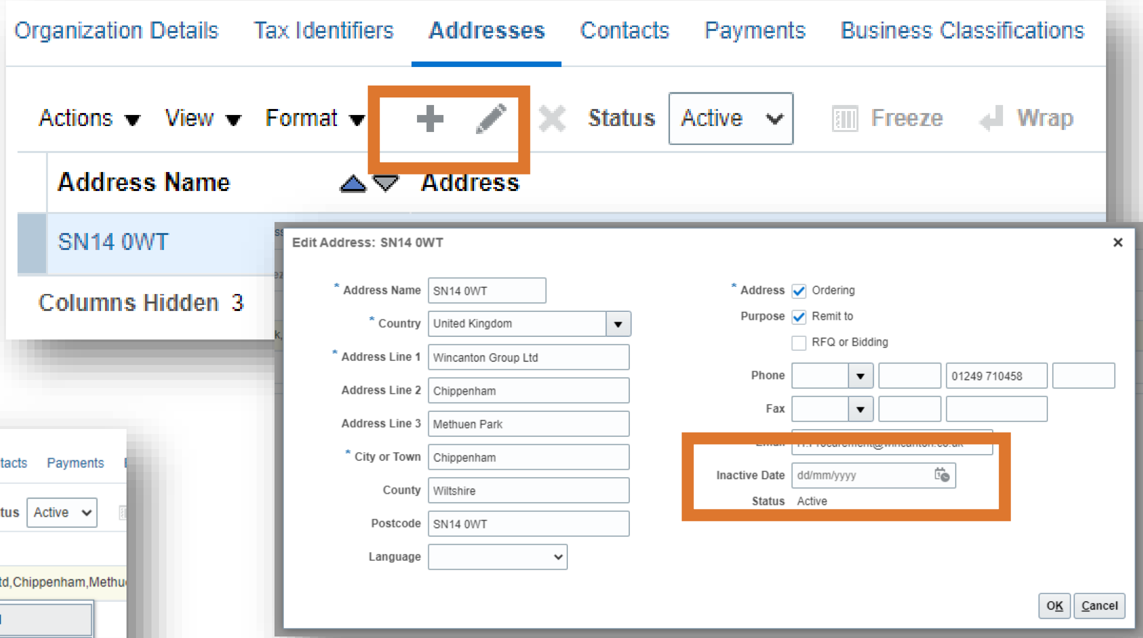
## Changes

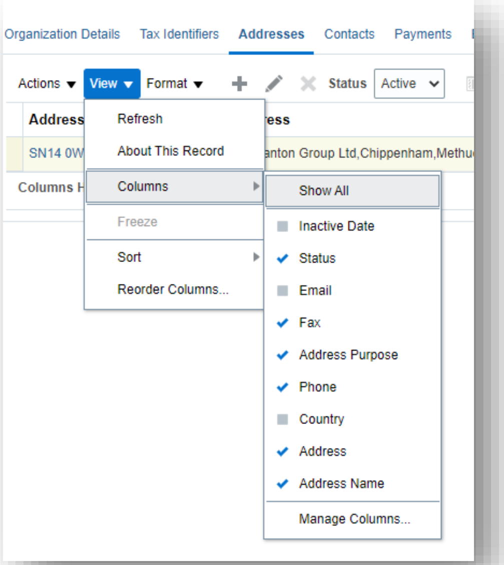
1. Click on the ‘Addresses’ tab
2. Read through the current details and click on the address name in blue
3. Complete the boxes as required
4. Click on ‘OK’ when finished, ‘Cancel’ if finished or the ‘X’ to close the window

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

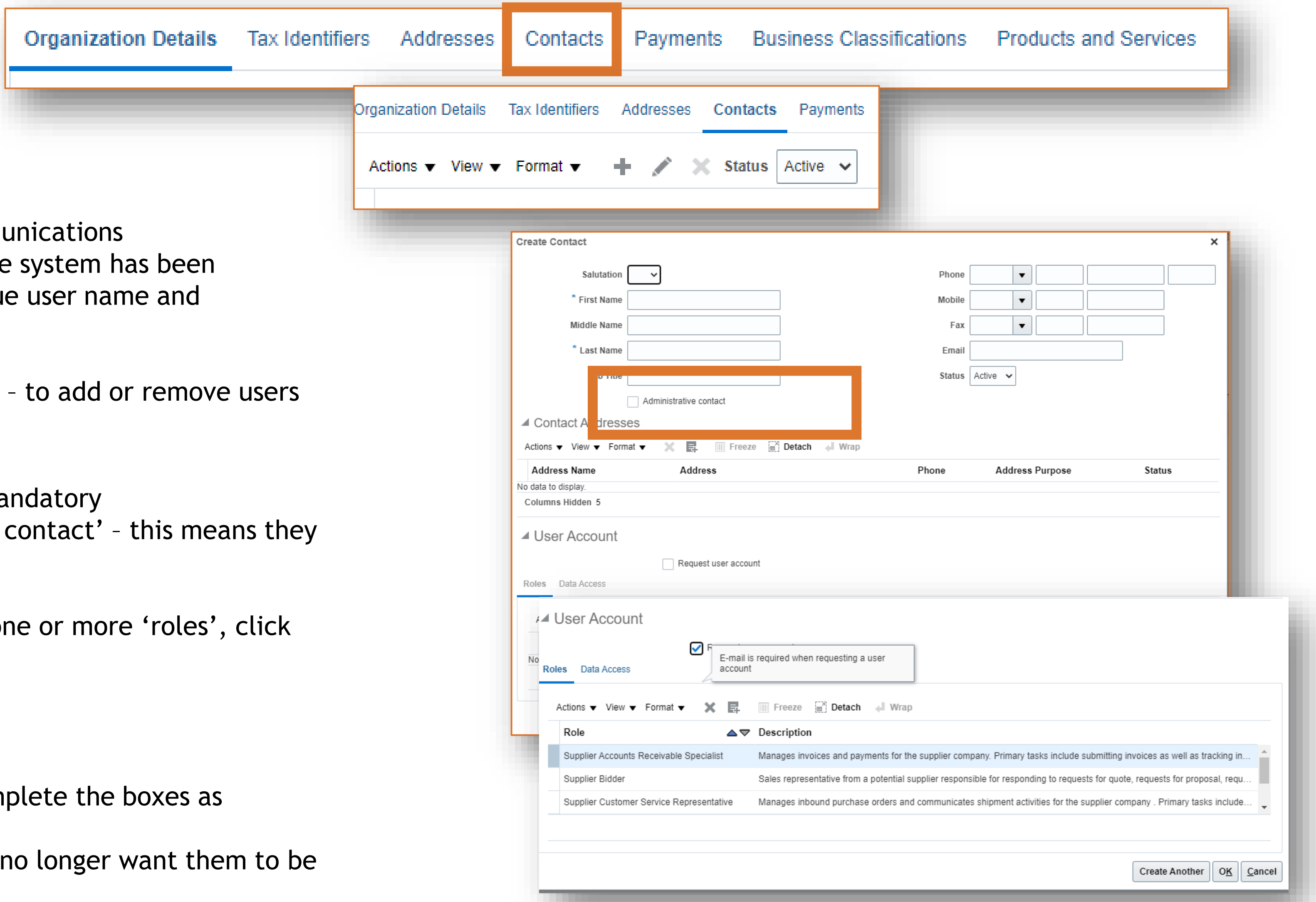
8. Follow the ‘Submitting Change Request’ process to ‘Save’ and/or ‘Review Changes’ etc
9. Remember to complete the ‘Change Description Box’



# 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

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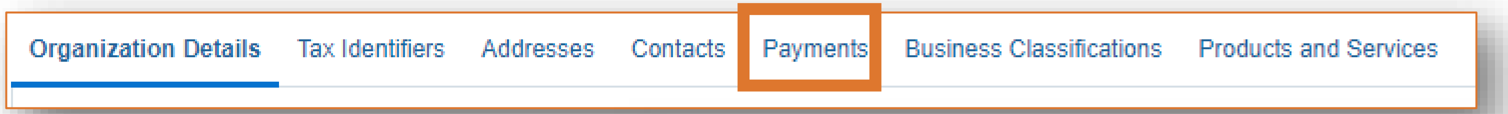
# Payments



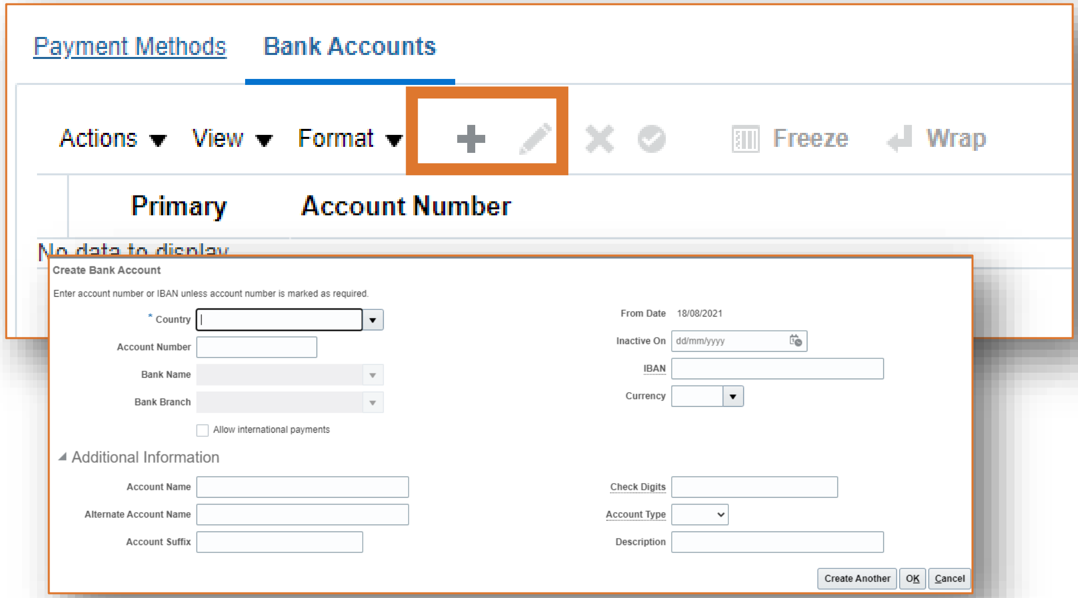


## Changes

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'



# 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)

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# 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

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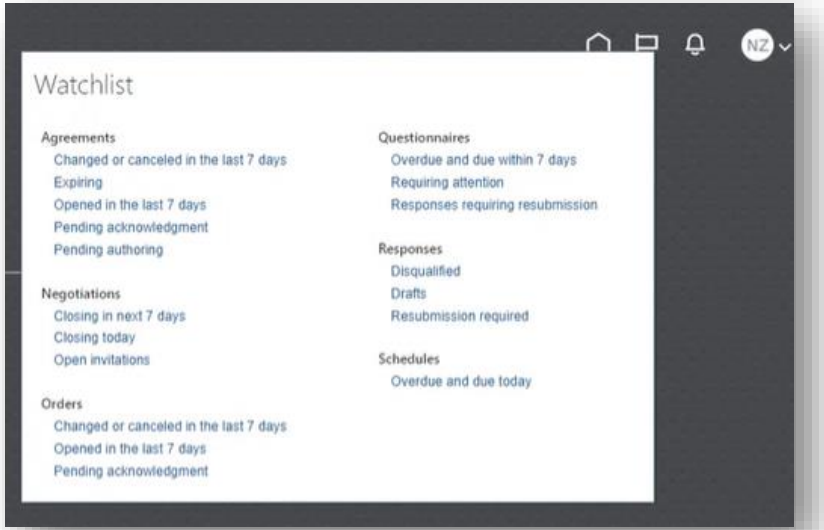
# Watchlist

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)



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# 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