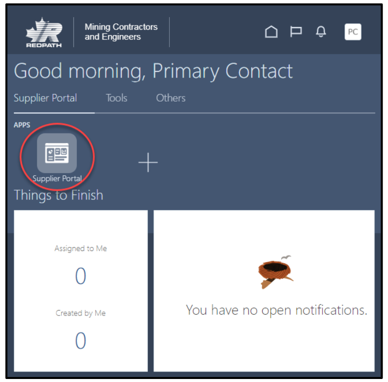
Supplier Portal – Training Handout

Welcome to Redpath's Self-Service Supplier Portal for Orders, Agreements, Shipments, Invoices & Payments, Negotiations and Company Profile.

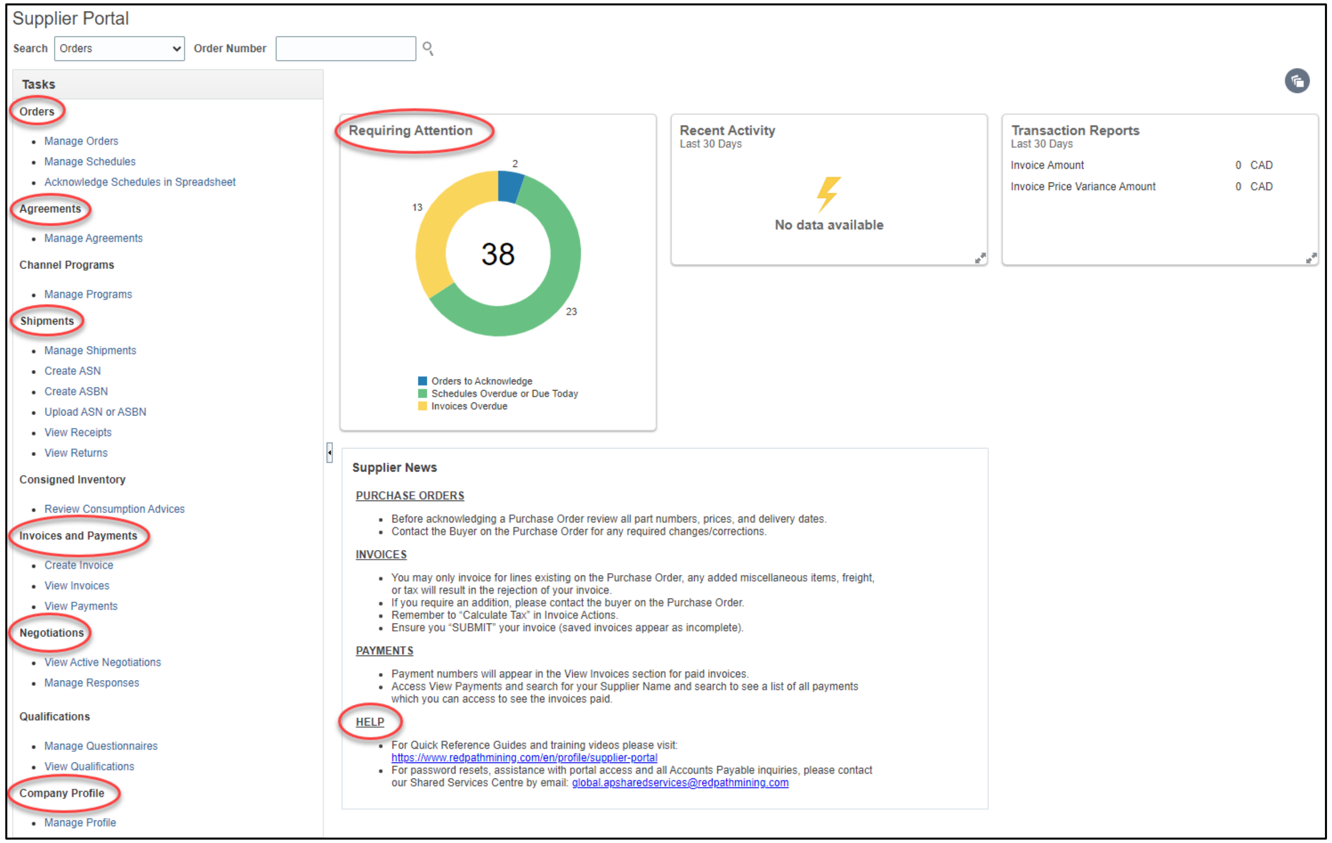
1. To begin working in the Supplier Portal, click the link [Sign In (oraclecloud.com)]() and log in using your email address and the password you created.
2. It will open the Home screen showing an Icon for the Supplier Portal (click to access the Portal). You will also see if you have any notifications (Things to Finish).
3. The Supplier Portal screen has the Tasks Menu, as listed above, Infolets for quick access, information, and a link to the Quick Reference Guides, in the Help section. This QRG will guide you through each Task section.

1

2



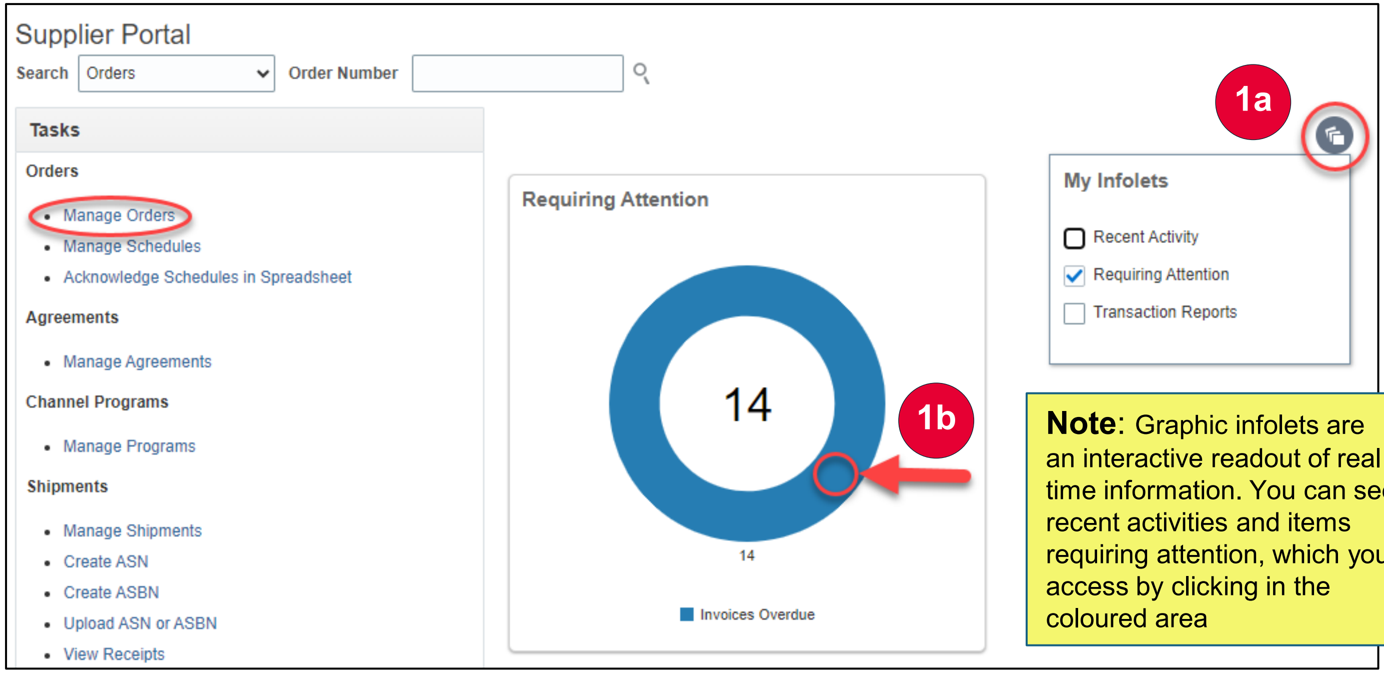
3



Supplier Portal - ORDERS

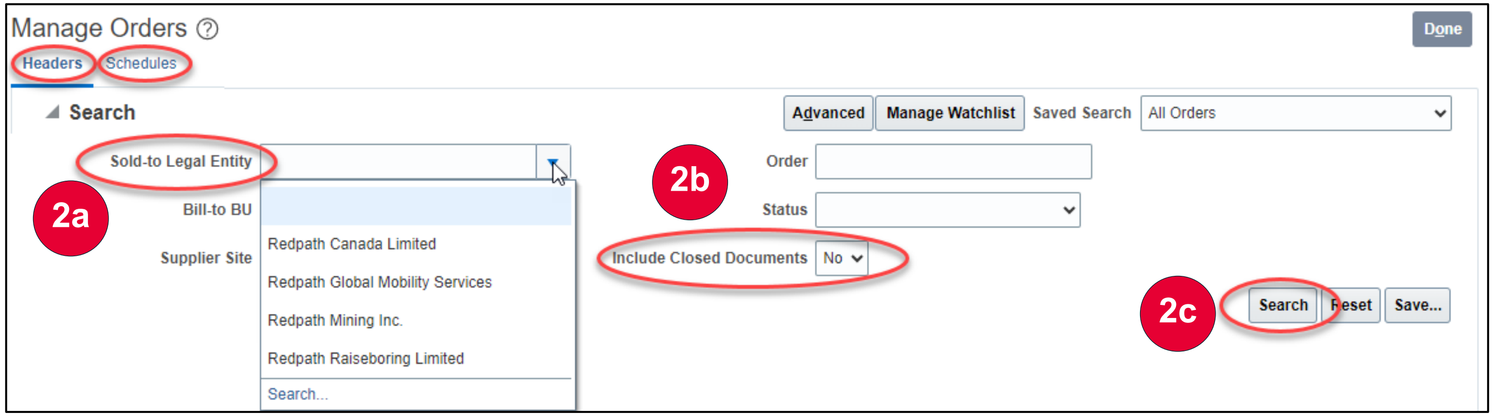
1. Open the supplier portal and select Manage Orders,
   a. You can manage your infolets
   b. You can quickly access items that require attention
2. Headers (returns PO number list) and Schedules (returns line items)
   a. Select the Redpath Entity for the order
   b. Choose to include closed documents (leave as Yes to retrieve all orders)
   c. Search

1



Note: Graphic infolets are an interactive readout of real time information. You can see recent activities and items requiring attention, which you access by clicking in the coloured area

2

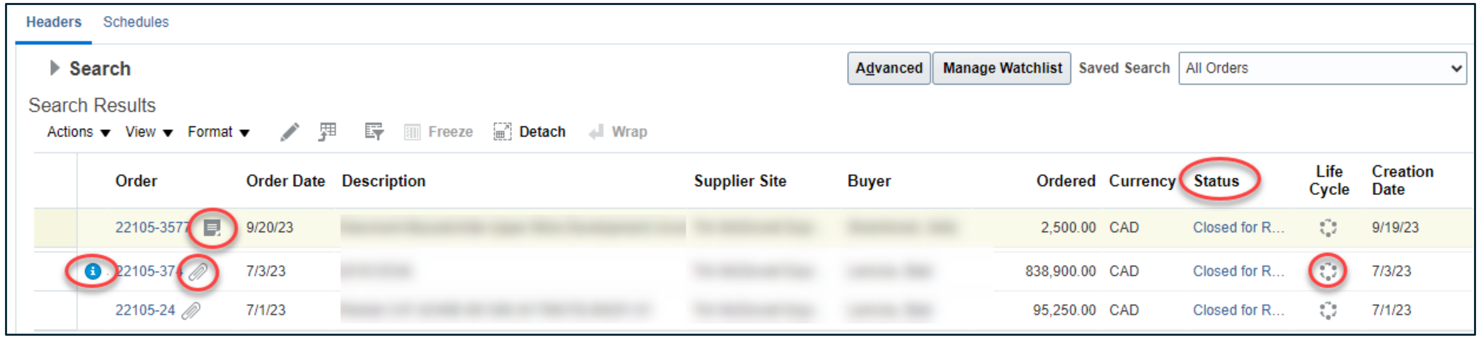


Supplier Portal - ORDERS

3. In the search results you will see the PO Status.
    a. Open (may require your acknowledgement)
    b. Closed for Receiving (goods are received by Redpath OR it is a Service PO with no receiving required)
    c. Closed for Invoicing (Your invoices are submitted)
    d. Closed (all receipts and invoices are completed)
4. Icons to know:
    a. Notes exist
    b. Acknowledgement is due
    c. Attachment
    d. Schedule is past due or has invoices on hold
    e. Order Life Cycle (see next page)

3

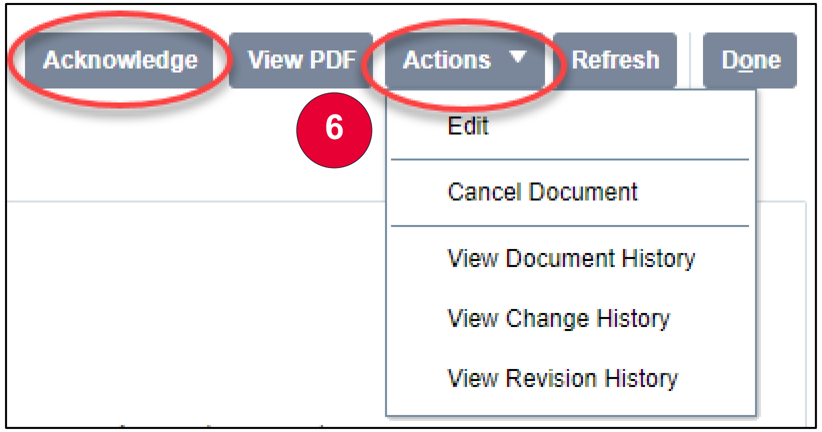
4

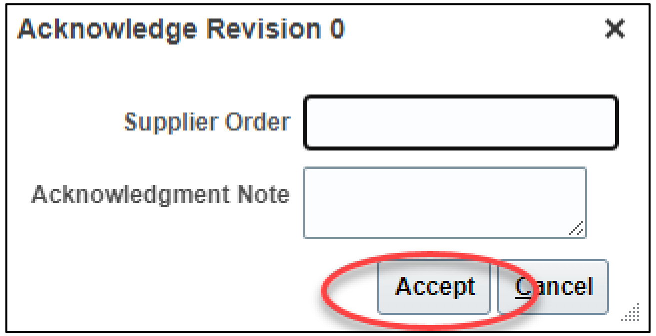


Supplier Portal - ORDERS

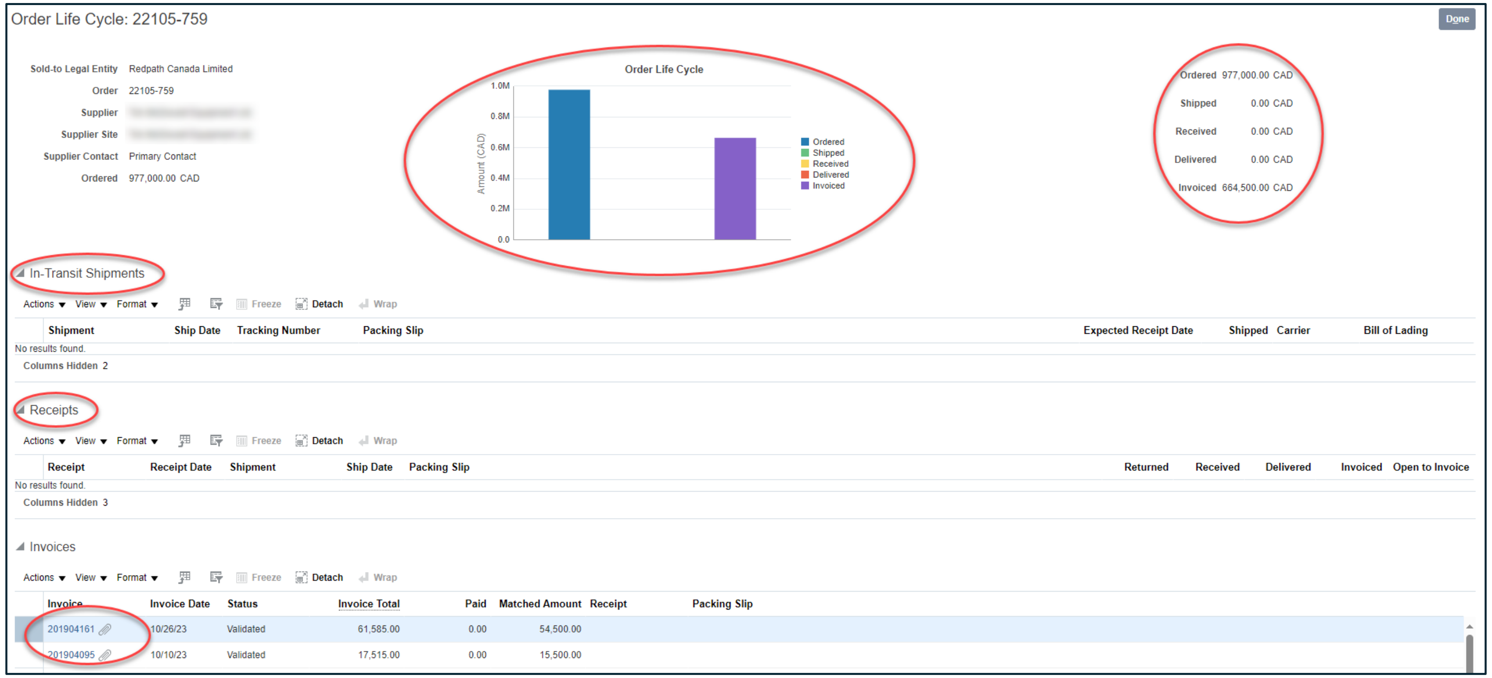
5. To acknowledge an order, click Acknowledge and in the pop up you can add your SO number, notes or simply Accept.
6. Other Actions - avoid Edit and Cancel – reach out to your Buyer for assistance, but you can select any of the following:
    a. View Document History
    b. View Change History
    c. View Revision History
7. Order Life Cycle
    a. Ordered vs. Invoiced
    b. In-Transit Shipments
    c. Receipts (from Redpath side)
    d. Invoices (from Supplier side)

5





7

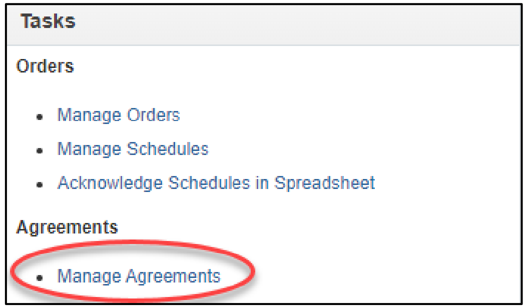


Supplier Portal – AGREEMENTS

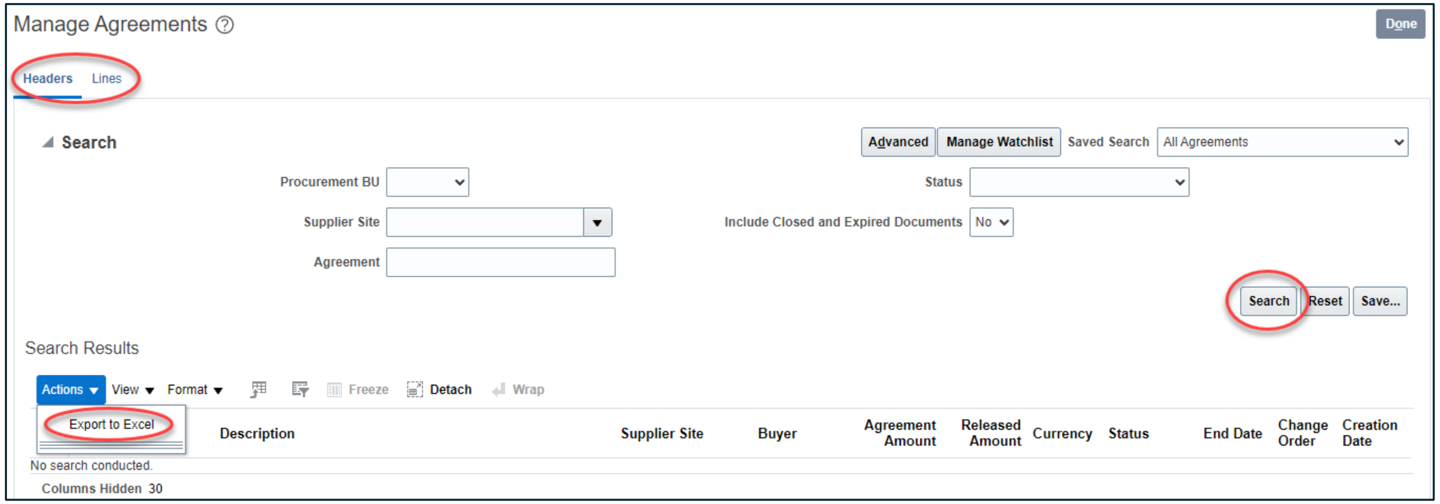
REDPATH

1. Agreements are created when Redpath and the Supplier have agreed to a set pricing term and to view your agreements, click on Manage Agreements.
2. The Headers tab is a high-level view, and the Lines tab shows the line-by-line details for each agreement. Click Search to view. You can export this data to Excel.

1



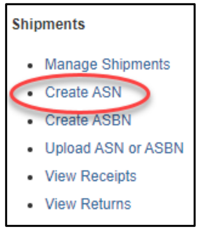
2



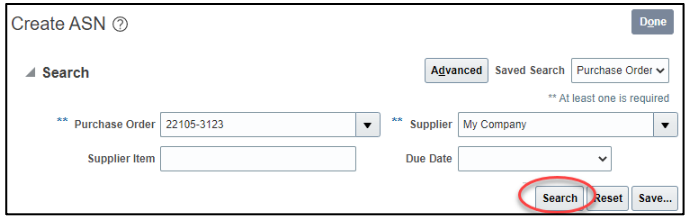
Supplier Portal – SHIPMENTS

1. To create an Advanced Shipment notification, click Create ASN under 'Shipments’.
2. Search for the PO for which ASN needs to be created.
3. Select the required lines and click 'Create ASN’.
4. Enter the required shipment details, including Shipment, Shipped Date, and Expected Receipt Date.
5. Scroll down to Lines section and enter the Quantity.
6. Review the details and click Submit.
7. An ASN is created for that purchase order.
8. The buyer will receive an email confirming that an ASN was created, along with the ASN number.

1

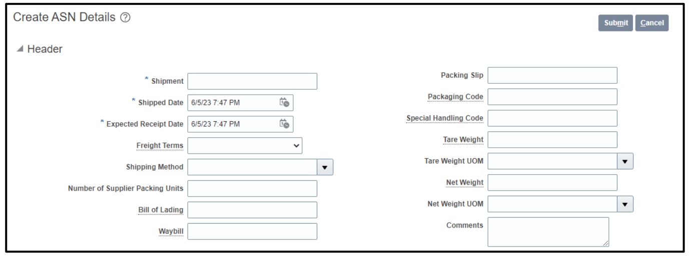


2

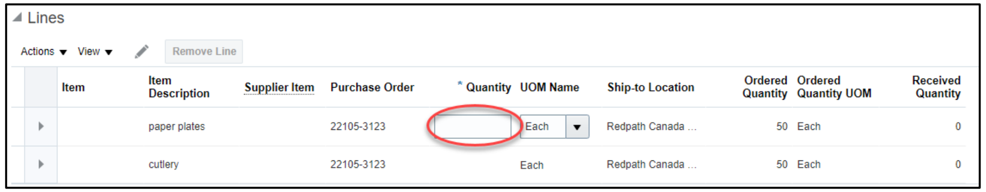


3

4



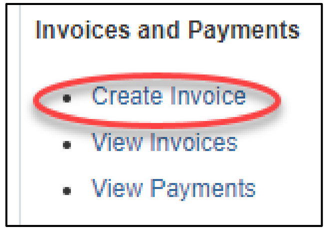
5



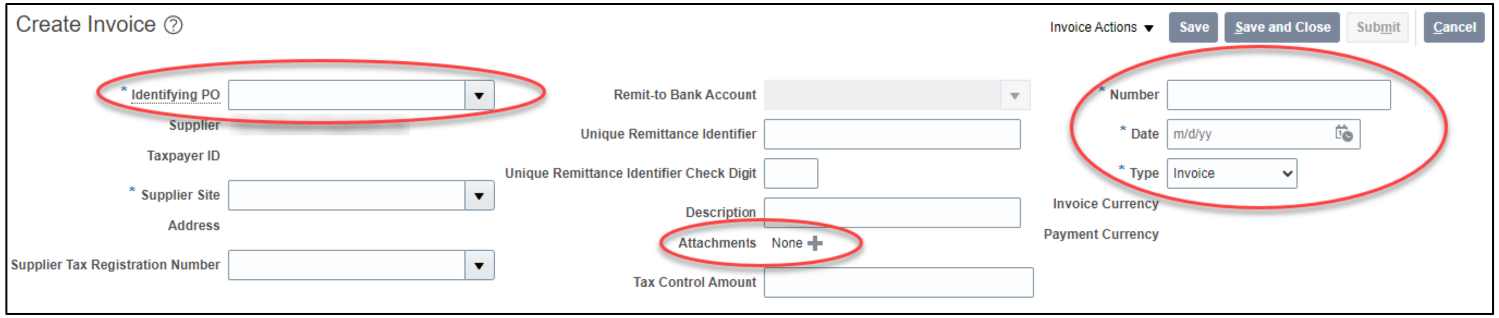
Supplier Portal – INVOICES & PAYMENTS

1. To submit and invoice for payment, click on Create Invoice.
2. In the top section, select the PO number from the drop-down menu for the invoice (as you type the number, a list should appear from which to select), the invoice number and date. Add your attachment (pdf copy of invoice is required).
3. Click the Select & Add icon only (never use the + sign or your invoice will be rejected).
4. In the Search Results highlight the line(s) you are invoicing and click Apply until you have all your lines selected. If all PO lines are on your invoice, you can use Select All. Click OK and the lines will be available for editing.

1

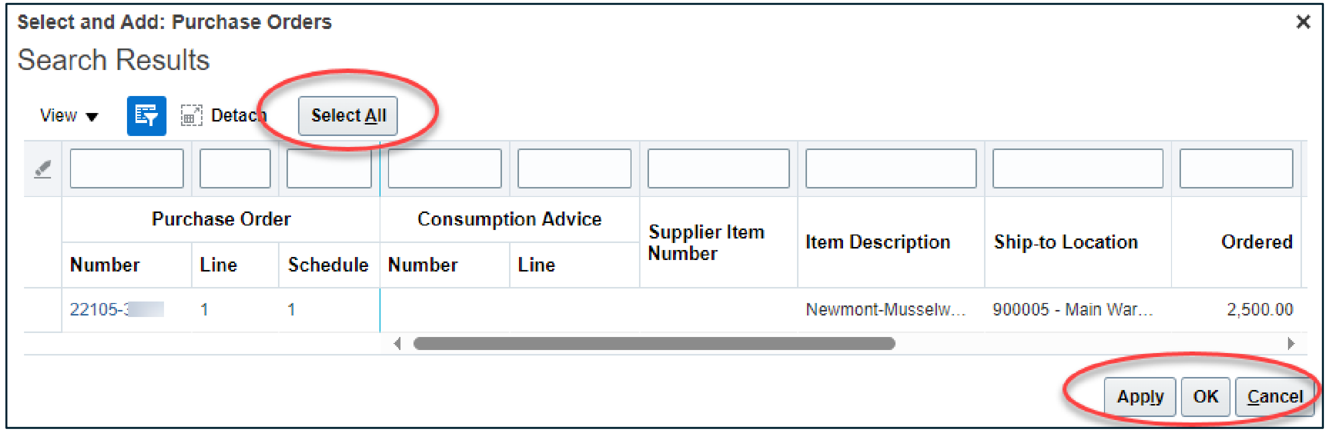


2



3

4



Supplier Portal – INVOICES & PAYMENTS

5. Edit the quantities on Goods POs or dollars on Service POs to match your invoice (ensure the Tax Classification box is empty)
6. Click Invoice Actions and select Calculate Tax (you will see the Summary Tax line populate). Your invoice should balance to the Invoice Amount in the bottom corner. Click Submit. The invoice is now submitted, and you will see a green confirmation message.

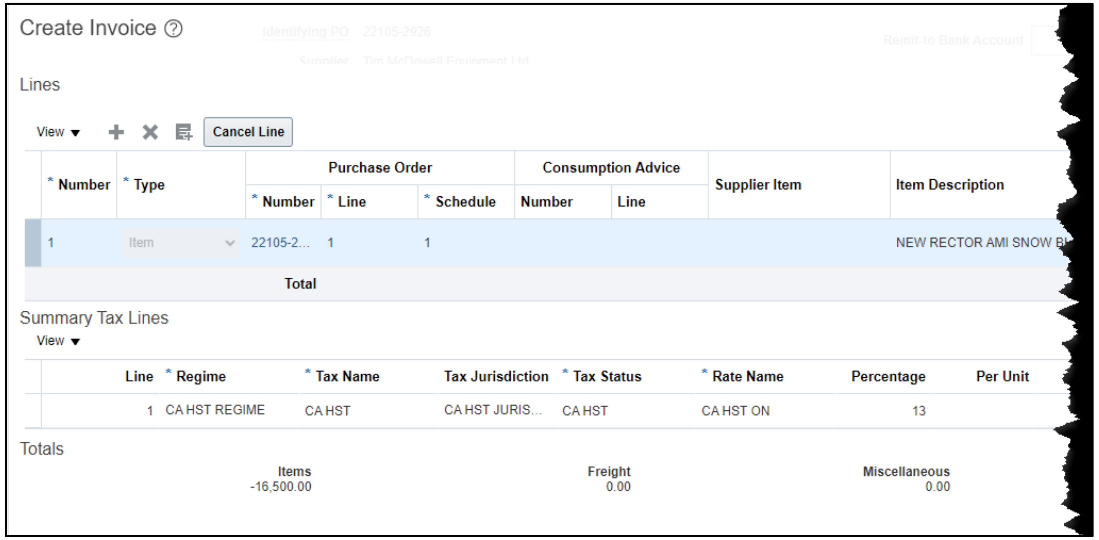
NOTE:

If your invoice is not matching the purchase order, please reach out to the buyer for instructions on how to proceed.

For Incomplete (unsubmitted) invoices you can perform the following actions:

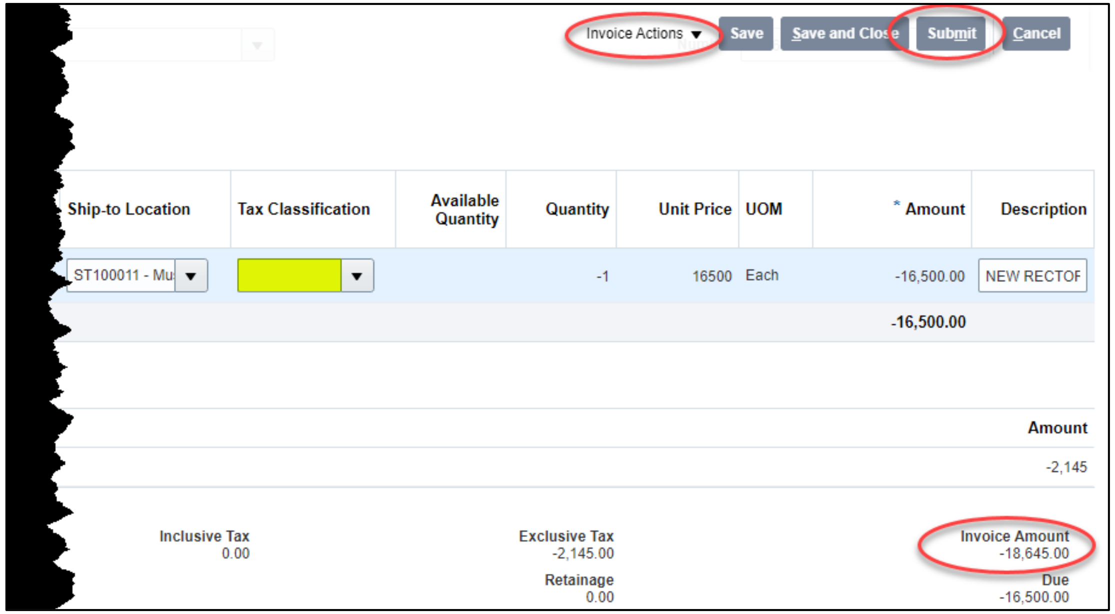
- Edit
- Delete/cancel the invoice
- Delete/cancel a line in the invoice

7



This is a split screen view

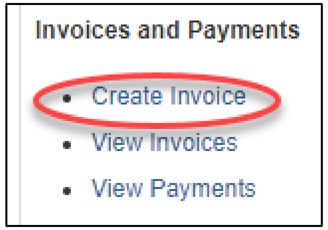
8



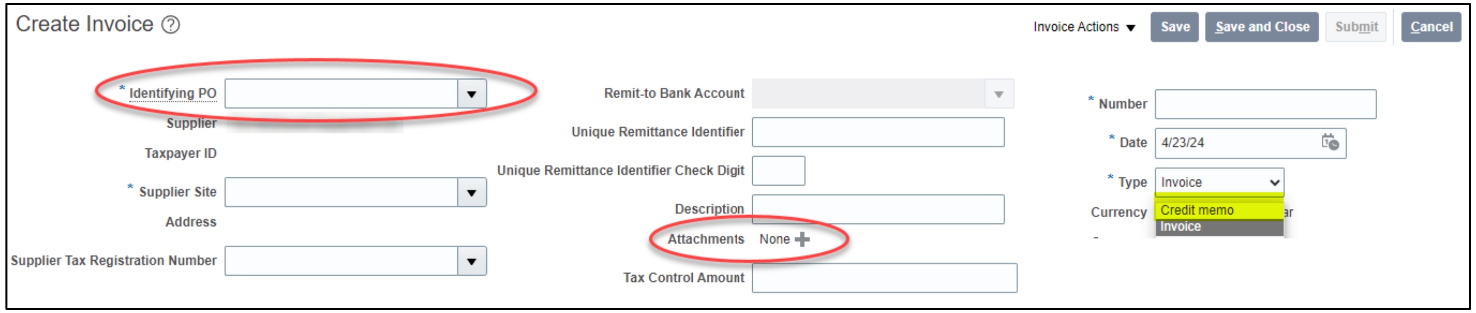
Supplier Portal – INVOICES & PAYMENTS

1. To submit a credit against a submitted invoice, click on Create Invoice.
2. In the top section, enter the PO number for the credit, the Credit Memo number and date. Change the Type to Credit Memo. Add your attachment (pdf copy of invoice is required)
3. Use the Select & Add icon only (never use the + sign or your invoice will be rejected)
4. In the Search Results highlight the line(s) you are crediting and click Apply until you have all your lines selected. If all PO lines are on your invoice, you can use Select All. Click OK and the lines will be available for editing.

1

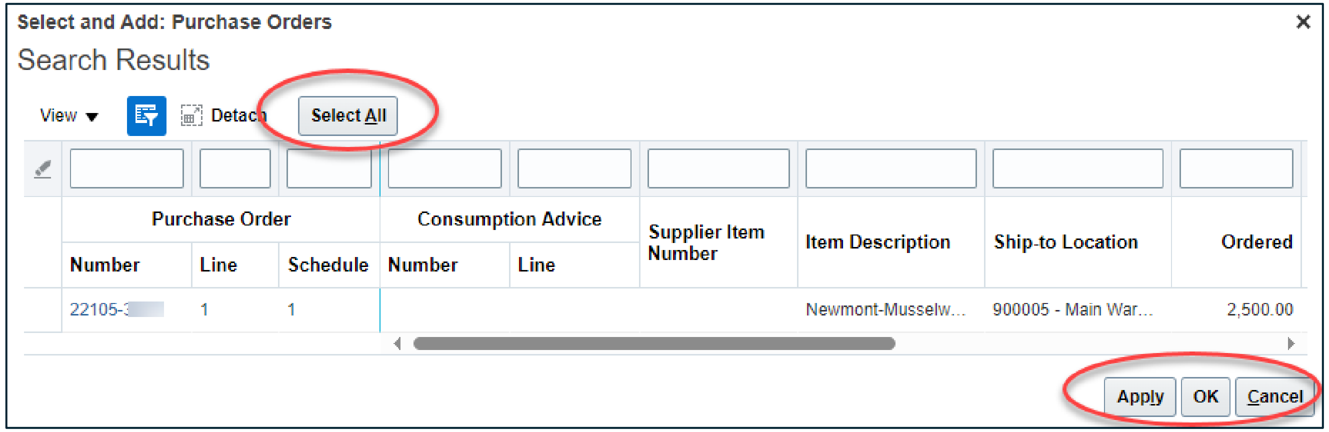


2



3

4

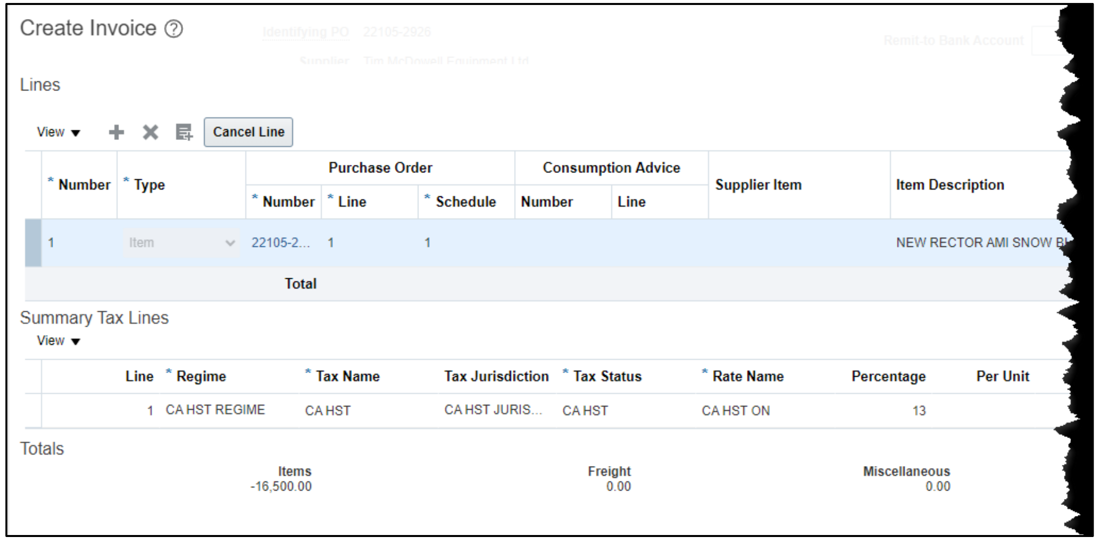


Supplier Portal – INVOICES & PAYMENTS

5. Edit the negative quantities on Goods POs or dollars on Service POs to match your credit (Ensure the Tax Classification box is empty)
6. Click Invoice Actions and select Calculate Tax (you will see the Summary Tax line populate). Your credit memo should balance to the Invoice Amount in the bottom corner. Click Submit. The credit is now submitted, and you will see a green confirmation message.

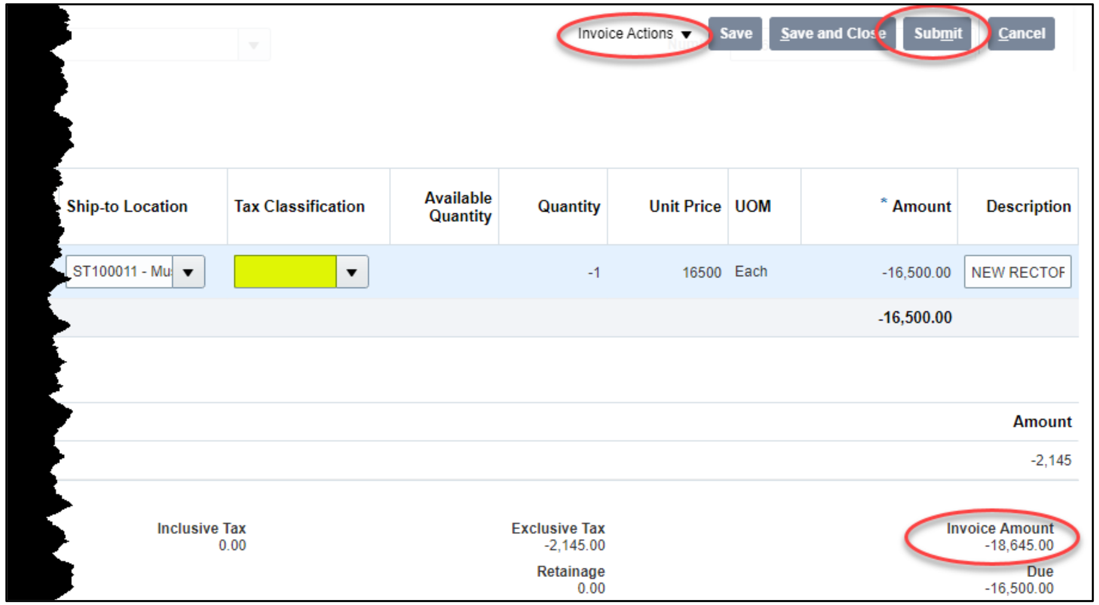
NOTE: If you are issuing a credit for an RMA for goods that includes a restock fee, please reach out to the buyer for instructions on how to proceed.

5



This is a split screen view

6



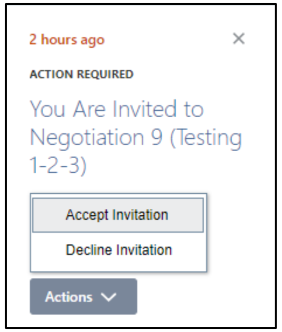
Supplier Portal – NEGOTIATIONS

REDPATH

1. Redpath will issue an invitation to negotiate for one of the following reasons:
   a. Request for Quote
   b. Agreements
   c. Renegotiate an existing agreements

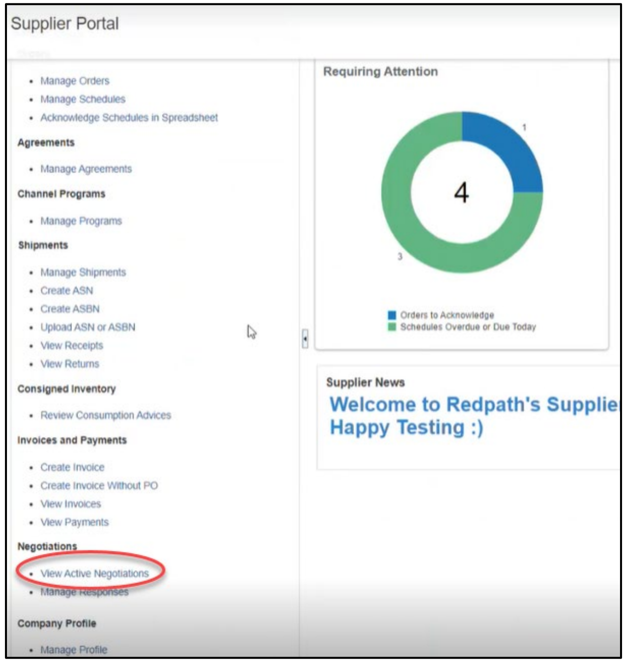
   You can click on Actions to accept or decline.
2. You will receive a notification informing you that you are invited to a negotiation. Click 'Accept Invitation' or 'Decline Invitation', as required or click the link in your notifications to review the negotiation.
3. You can also access the negotiation through the Supplier Portal and select 'View Active Negotiations'

1



2

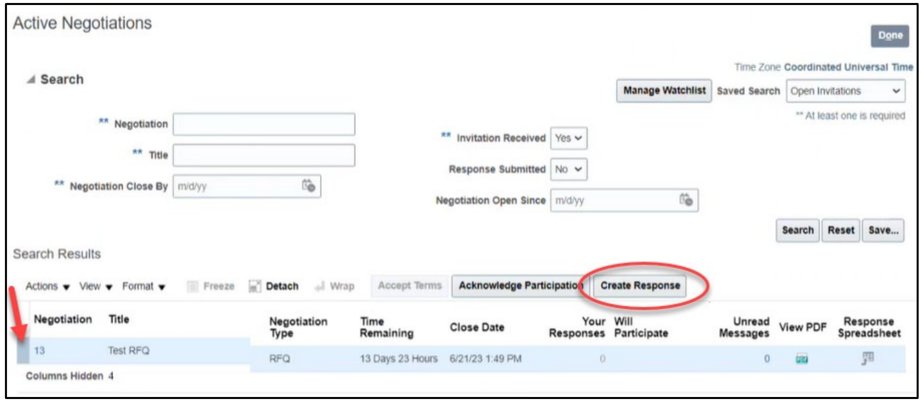
3



Supplier Portal – NEGOTIATIONS

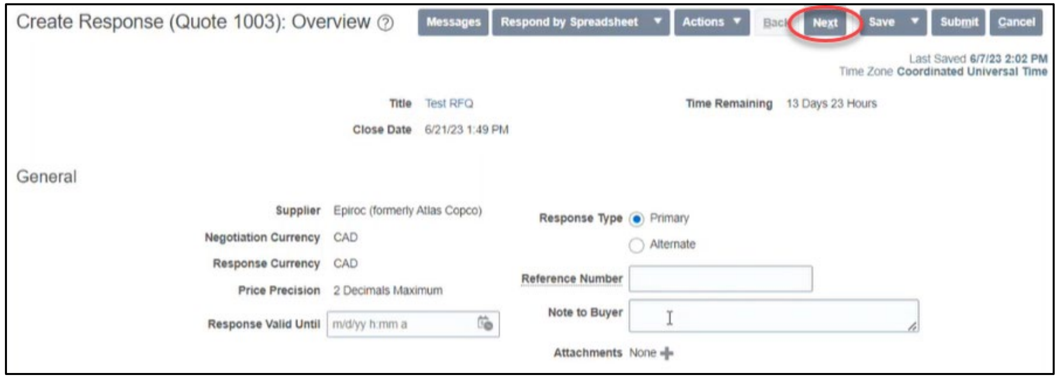
4. Select the negotiation to which you want to respond and click 'Create Response'
5. You need to perform four steps to complete the response
6. On the Overview page:
    a. Response validity date
    b. Reference number
    c. Notes for the buyer, if applicable
    d. Click Next

4



5

6

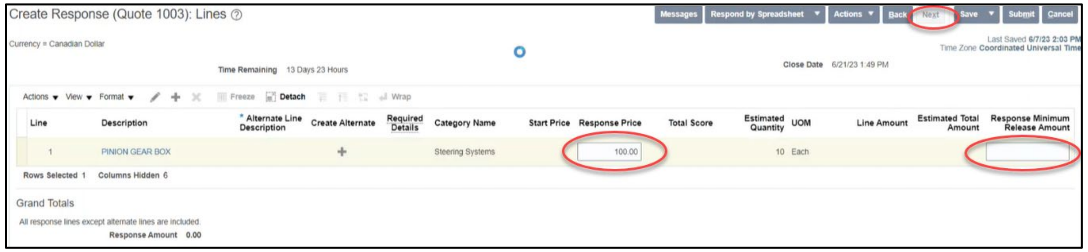


Supplier Portal – NEGOTIATIONS

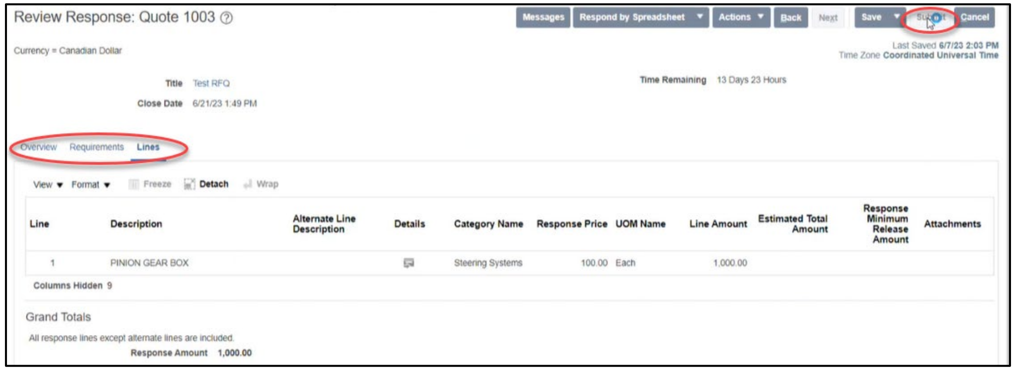
7. Requirements
    a. Respond to all questions, in all sections
    b. Click Next
8. Lines
    a. Add the Response Price and any minimum quantity
    b. Click Next
9. Review
    a. All 3 tabs are available to review
    b. Click Save or Submit, if acceptable

7

8



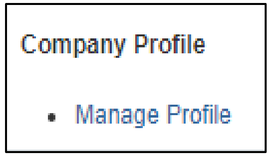
9



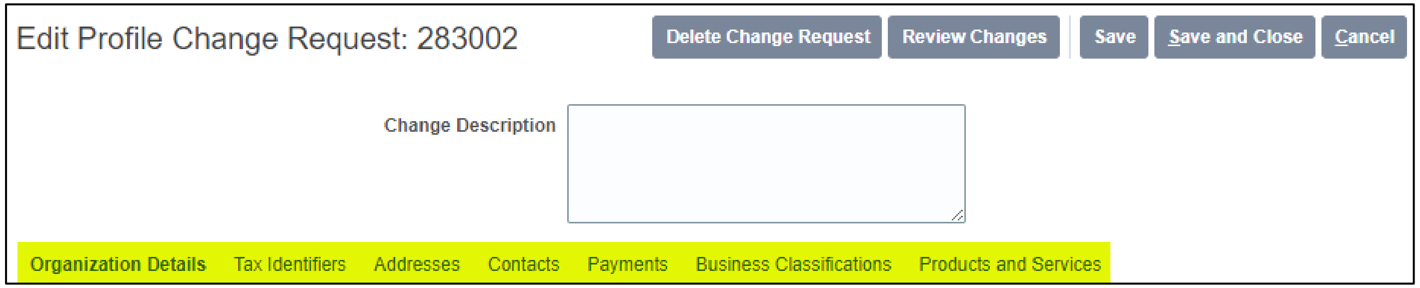
Supplier Portal – COMPANY PROFILE

1. To edit your Company Profile, click Manage Profile and then click the Edit button on the top right of the page. Confirm you wish to continue with the change request.
2. Add a brief description of the changes you will perform and edit the required fields by selecting the appropriate tab:
   a. Organization Details
   b. Tax Identifiers
   c. Addresses
   d. Contacts
   e. Payments
   f. Business Classifications
   g. Products and Services

1



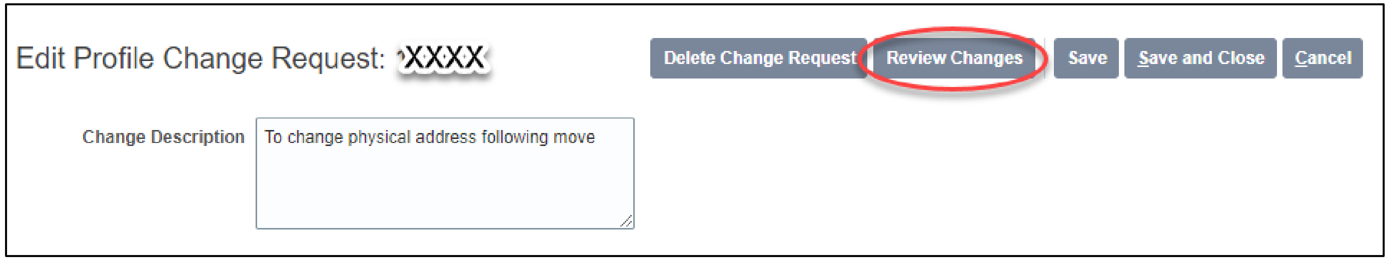
2



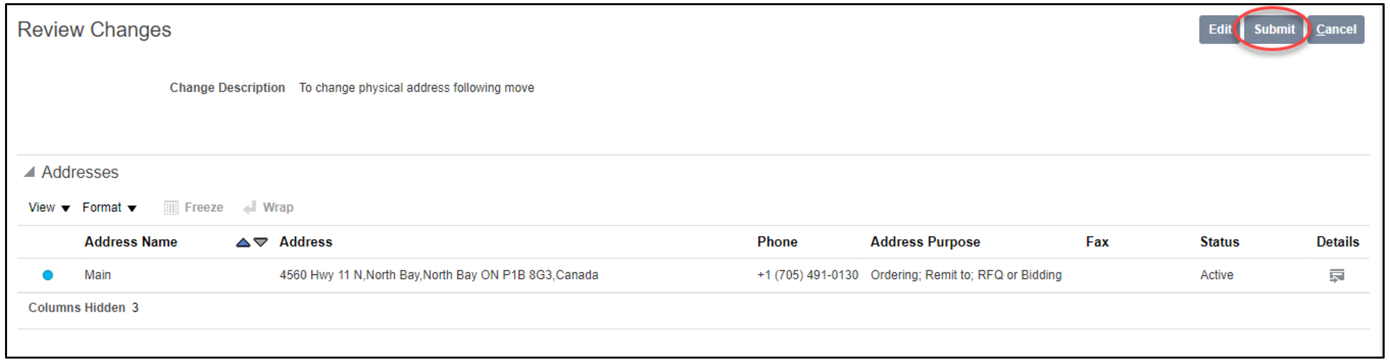
Supplier Portal – COMPANY PROFILE

3. Click Review Changes in the upper right corner of the screen. All changes will appear in a list for review.
   a. If you want to delete the change request at any point, select the Delete Change Request button.
4. If corrections are required, click Edit to make the required changes, return to review when done
5. Click Submit. A confirmation message will appear followed by an email or system notification advising if approved or rejected.

3



4



5