

# AVEVA

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## Supplier Portal: Supplier Registration Training Guide



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## Purpose

This document is intended for Suppliers. Please use this Training Guide to assist you when submitting your Supplier Registration request and using the Supplier Portal.

## Symbols used in this document

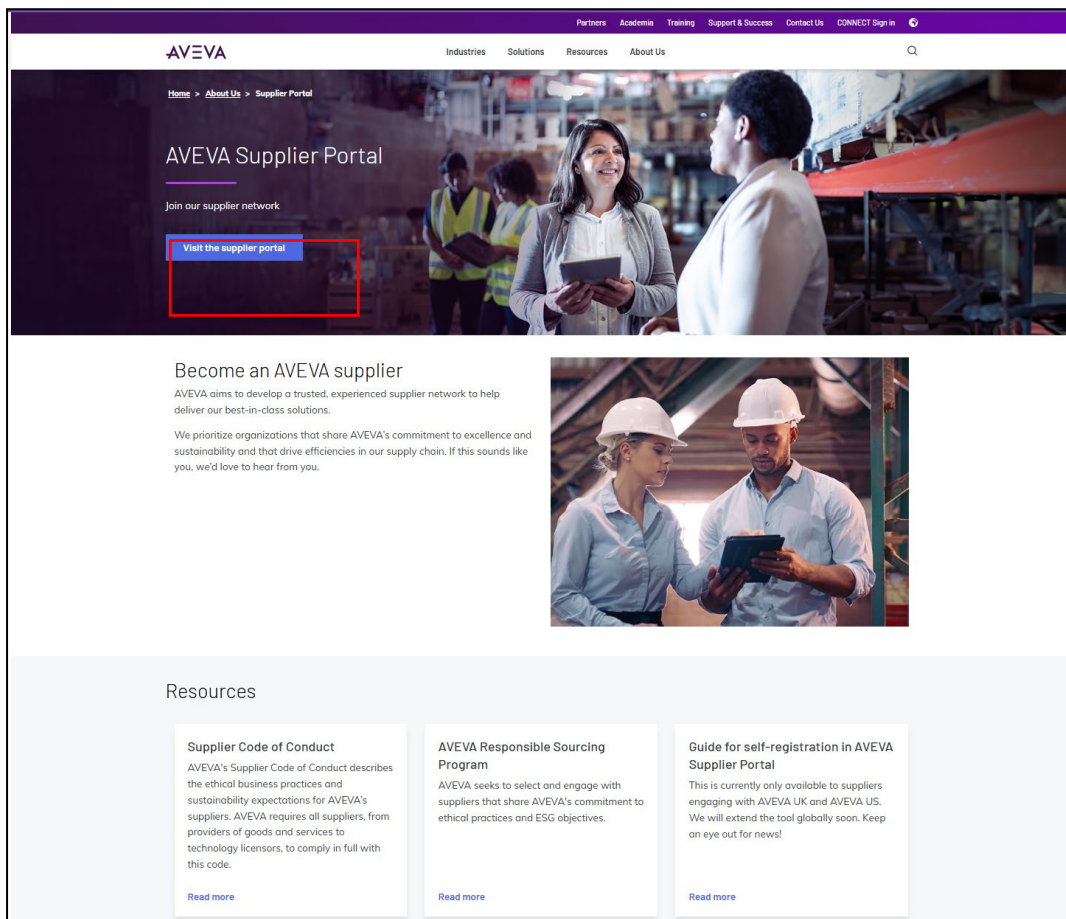
	Warning
	Please note
	Useful additional information and supporting documentation for suppliers

# Supplier Portal Landing Page

To register your interest in becoming an AVEVA supplier, visit the Supplier Portal landing page and enter your company details.

1. Click on the link <https://www.aveva.com/en/about/supplier-portal/>

The following page is displayed:



To register your interest:

1. Click on the **Visit the Supplier Portal** button

A pop-up page is displayed:

2. Enter your **Company Name** and **Contact Details**
3. Enter the **AVEVA entity** you wish to do business with, for example the United Kingdom

Please note all fields are mandatory.

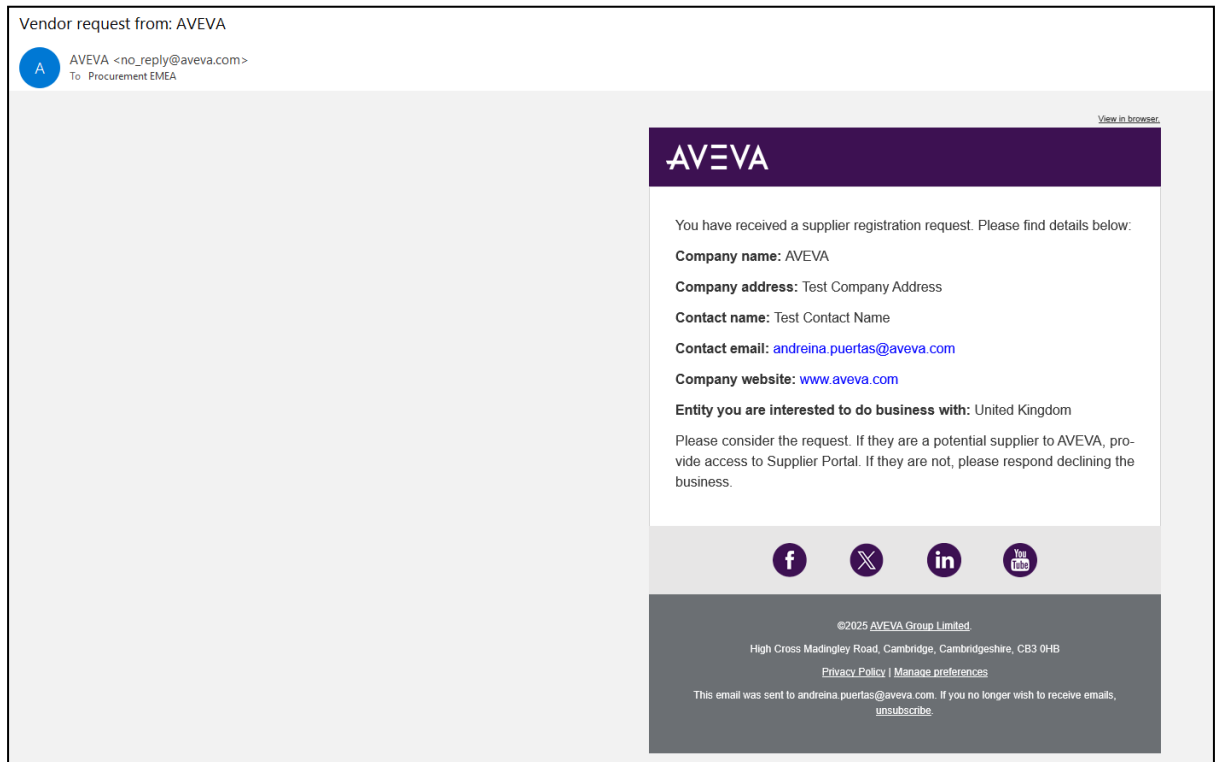
Please click on the **Privacy Policy** link to see how we collect and use your information.

4. Click on the **Submit** button

A confirmation of submission is displayed:

Thank you for your submission. One of our Procurement team members will review your application. Please expect to hear from us shortly.

The relevant Procurement team member for the country you selected will receive an email notification, an example is illustrated below:



A Procurement team member will review your request, if successful you will be invited to complete the Supplier Registration form, a link will be sent to the email address you supplied.

You will be notified by email if you are not successful.

# Supplier Registration

The **Supplier Registration** online form is used to submit your registration request to become an AVEVA supplier.

Before you begin the registration process, please familiarise yourself with the following documents, which can be accessed via links on the Supplier Registration home page:



- Supplier registration SOP
- AVEVA's supplier code of conduct
- AVEVA's privacy policy

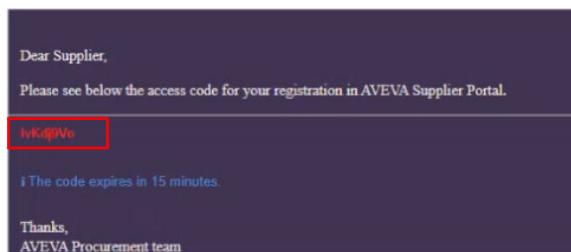
To begin this process:

1. Enter your email address
2. Click on the **send access code** button

An access code will be sent to your email address

3. Check your email

An example of an access code is highlighted



4. Copy the **access code**
5. Return to the **supplier registration** home page
6. Paste the **access code**
7. Click on the **Continue** button

# How to register as a new supplier

The supplier registration opens once you enter your access code.

There are six sections which need to be completed as part of the registration process:

- Company Details
- Contacts
- Addresses
- Business Classifications
- Products and Services
- Questionnaire

## Company Details

### 1. Complete the **Company Details** form



As you enter your company details, some fields will become mandatory, this is indicated by the word **required** beneath the relevant field, you must complete these fields.

Field	Data entry
Company	Enter your company name
Website	Enter your company website URL
Country	Select a country
Taxpayer ID	
Tax Registration Number	<p>Enter your company tax registration number</p> <p>Please note: The tax registration number field has a validation rule applied; this is to ensure the number is entered in the correct format</p> <p>In the United Kingdom for example, the format is a two-character country code plus 3, 7 or 10 digit numeric</p>

Field	Data entry
	<p>For example:</p> <ul style="list-style-type: none"> <li>• GB123</li> <li>• GB1234567</li> <li>• GB1234567890</li> </ul> <p>This field becomes a required field once a country has been selected from the country field</p>
D-U-N-S Number*	
Organizational Type	<p><b>Individual</b> is displayed by default.</p> <p>You can select alternatives from the drop-down, for example, Corporation, Government Agency, Limited Company etc.</p>
Supplier Type	This field displays <b>External</b> by default and is not editable
Note to Approver	This is a free text field; you can enter an optional note which will be visible to the Approver when they review your application.
Supporting documentation	<p>Attach supporting documentation, such as tax certificates, insurance certificates etc.</p> <p>These documents can be selected from a folder or dragged and dropped into the relevant field</p>

**\*Please Note:** Tax Payer ID, Tax Registration or DUNS Number must be provided 

The illustration below shows an example of a completed **Company Details** form.

**Supplier Registration**

### Company Details

Enter Tax Registration Number or D-U-N-S Number or Taxpayer ID to be successfully registered with AVEVA

Company P B Redwood Ltd	Website www.PBRedwood.com	Country United Kingdom ▼
Taxpayer ID	Tax Registration Number GB 135356890	D-U-N-S Number
Organization Type Individual ▼	Supplier Type External	

Note to Approver  
Additional insurance document to be added

Make sure you attach all required documents for smooth registration approval.

**Attach tax, insurance, and other relevant documents**  
Required

**Drag and Drop**  
Select or drop files here.

URL	Add URL
-----	---------

Updated just now
Cancel Save Continue





Please ensure that all relevant tax registration IDs are provided in the appropriate fields for example **taxpayer ID** and/or **tax registration number** supported by the tax certificates to ensure compliance with local tax laws



You must add supporting documents, this section is mandatory







In the illustration below, the supplier's insurance documentation and tax certificate have been attached.

Make sure you attach all required documents for smooth registration approval.

Attach tax, insurance, and other relevant documents Required

**Drag and Drop**  
Select or drop files here.

URL  Add URL

 PB Redwood Ltd Insurance Documentation.docx	Last updated on 30/10/2024 13.69 KB	 
 PB Redwood Ltd Tax Certificate.docx	Last updated on 30/10/2024 13.69 KB	 

At this point, you can save the page and return at a later date, or you can continue to the next page.

2. Click on the **Continue** button

## Contacts

The **Contacts** page is displayed. Enter the contact details of the person any communications should be sent to. Multiple contacts can be entered.

In the illustration below, the email field has been automatically populated with the email address of the person completing the supplier registration form.

### 3. Enter the **Contact** details

Field	Data entry
First Name	Enter the first name of the contact
Last Name	Enter the last name of the contact
Email	The email address will auto populate with the email address you entered when registering
Job Title	Enter the job title of the contact
Country	Enter the country code
Mobile / Phone	Enter the contact mobile and/or phone number
Is this an administrative contact?	Administrative contacts will receive general communications  Select <b>Yes</b> or <b>No</b>
Does this contact need a user account?	A <b>user account</b> will give a contact access to the Supplier Portal. From the Supplier Portal you can perform self-service tasks, such as viewing purchase orders.  Select <b>Yes</b> or <b>No</b>
What user roles does this contact need?	Defaults to <b>AVEVA External Supplier Portal</b>

**Supplier Registration**

## Contacts

**Contact 1**  
Enter contact details. Registration communications will be sent to this contact.

First Name Bella	Last Name Roberts	Email bella2694@thegrampians.net
Job Title Manager	Country GB	Mobile +44 7983 451167
Country GB	Phone +44 20 8234 6489	Ext
Country GB	Fax +44	

**Is this an administrative contact?**  
Our communications will be sent to the administrative contact  Yes  No

**Does this contact need a user account?**  
User accounts will provide online access to supplier transactions and self-service tasks.  Yes  No

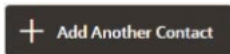
**What user roles does this contact need?**  
Assign at least 1 user role to specify the responsibilities of the contact.

Aveva External Supplier Portal

**+ Add Another Contact**

Last updated 3 minutes ago Cancel Save **Continue**

- Click on **Add Another Contact** button



- Repeat the process to add as many contacts as required

At this point, you can save the page and return at a later date, or you can continue to the next page.

- Click on the **Continue** button

## Addresses

The Addresses page is displayed. The **Address Name** must be entered in a specific format, for example to enter the address name for a supplier called P B Redwood based in Cambridge, UK, the following naming convention must be followed:

Field	Data Entry
First 2 letters Country Code	GB
First 3 letters of the Town or City	CAM
First 5 letters of the Supplier Name	PBRED
2 numbers of a sequence starting from 01	01
Each entry is separated by an underscore. The supplier address name in this example is:	
<b>GB_CAM_PBRED_01</b>	

### 7. Enter the **Address** details

**Supplier Registration**

### Addresses

Please use the following naming convention for the Address Name field: 1. Two letters of the Country Code, 2. First three letters of the Town/City, 3. First five letters of letters of Supplier name, 4. Two numbers of a sequence starting from 01. Example: AVEVA in Cambridge – GB\_CAM\_AVEVA\_01 For more information, please review the SOP accessing here.

**Address 1**

**Address Name** Required

**What's this address used for?** Select at least 1 purpose.

Receive Purchase Orders  Receive Payments  Bid on RFQs

Country/Region: United States

Address Line 1, Address Line 2, City, State, Postal Code, County

Email, Country: US, Phone, Ext.

Country: US, Fax

Which contacts are associated to this address?

Updated just now

Cancel Save **Continue**

Field	Data Entry
Address Name	Enter the address name, using the naming convention, for example: GB_CAM_PBRED_01
What's this address used for?	Select: <ul style="list-style-type: none"> <li>Receive Purchase Orders</li> <li>Receive Payments</li> <li>Bid on RFQs</li> </ul> At least 1 purpose must be selected
Country/Region	Select a country from the list
Address Lines	Enter your address details
Email	Enter your email address

Field	Data Entry
Country	The country code will default from the country / region selected, for example GB, US etc.
Phone	Enter your phone number and extension
Which contacts are associated to the address?	The contacts set up in the Contacts page will be displayed. Select those contacts which are associated to the address

In the illustration below, two contacts have been created in the Supplier Portal. Both contacts have been selected and associated to the address.

To add another address:

8. Click on the **Add Another Address** button



9. Repeat the process to add as many addresses as required



Please ensure you use a unique address name in for each new address. For example, GB\_CAM\_PBRED\_01 was used for the first address. If you are adding a new address for your London office, you would create a new address name, e.g., GB\_CAM\_PBRED\_02.

At this point, you can save the page and return at a later date, or you can continue to the next page.

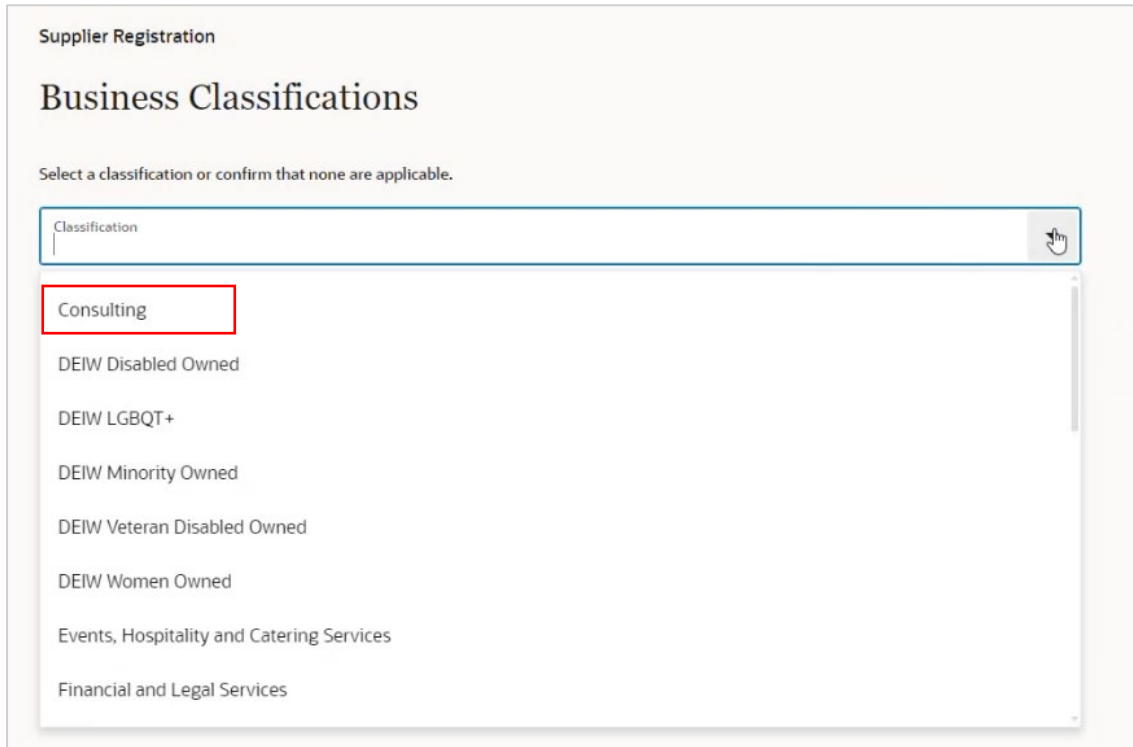
10. Click on the **Continue** button

## Business Classifications

The **Business Classifications** page is displayed.

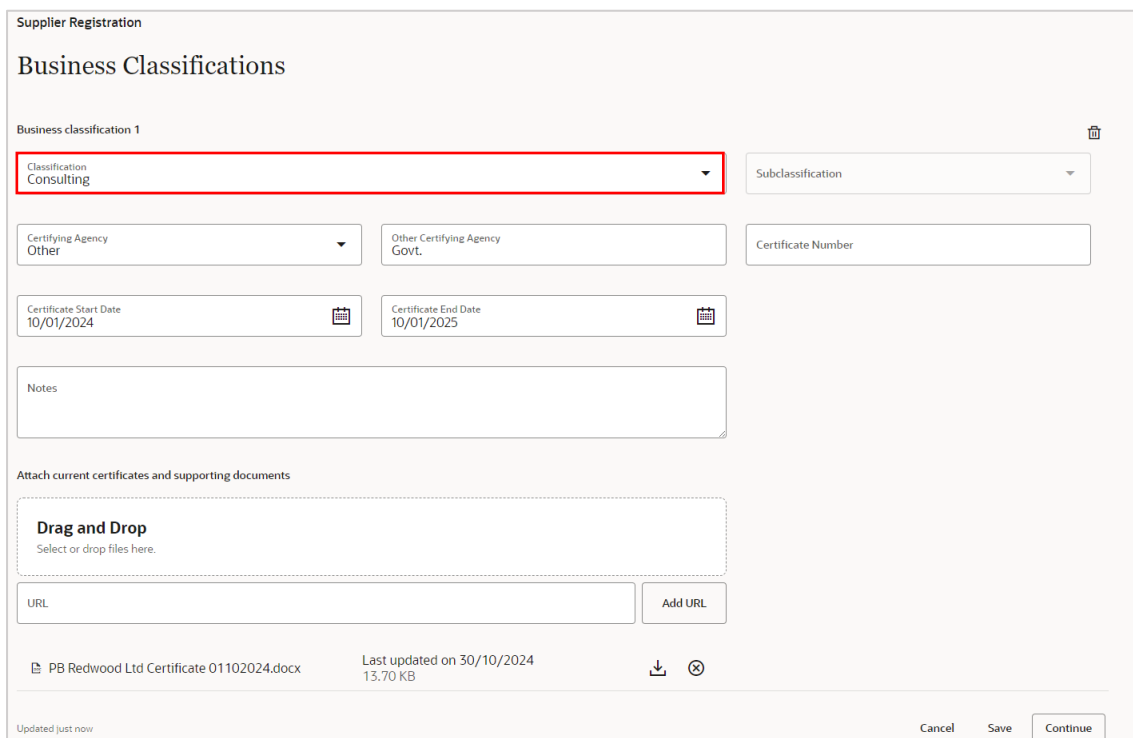
To select a classification from the list.

11. Click on the drop-down menu and select a classification



The screenshot shows the 'Supplier Registration' page with the 'Business Classifications' section. Below the heading, there is a prompt: 'Select a classification or confirm that none are applicable.' A search bar labeled 'Classification' is shown with a hand cursor icon on the right. Below the search bar, a list of classification options is displayed. The 'Consulting' option is highlighted with a red rectangular box. Other options include 'DEIW Disabled Owned', 'DEIW LGBTQ+', 'DEIW Minority Owned', 'DEIW Veteran Disabled Owned', 'DEIW Women Owned', 'Events, Hospitality and Catering Services', and 'Financial and Legal Services'.

In the illustration below, Consulting has been selected.



The screenshot shows the 'Supplier Registration' page with the 'Business Classifications' section. The 'Business classification 1' section is highlighted with a red rectangular box. The 'Classification' dropdown menu is set to 'Consulting'. The 'Subclassification' dropdown menu is empty. Below this, there are several input fields: 'Certifying Agency' (set to 'Other'), 'Other Certifying Agency' (set to 'Govt.'), and 'Certificate Number'. There are also date pickers for 'Certificate Start Date' (10/01/2024) and 'Certificate End Date' (10/01/2025). A 'Notes' text area is present. Below the notes, there is a section for 'Attach current certificates and supporting documents' with a 'Drag and Drop' area and a 'URL' input field with an 'Add URL' button. At the bottom, there is a file upload section showing a file named 'PB Redwood Ltd Certificate 01102024.docx' with a size of 13.70 KB and a last updated date of 30/10/2024. The page footer includes 'Updated just now' and buttons for 'Cancel', 'Save', and 'Continue'.

Field	Data Entry
Classification	The classification will default from the previous screen
Certifying Agency	Select <b>Other</b>
Other Certifying Agency	Enter the certifying agency, for example Govt.
Certification Number	Enter the certification number if you know it and attach the certificate and any supporting documentation in the <b>Drag and Drop</b> area
Certificate Start Date	Enter the certificate start and end dates
Certificate End Date	
Notes	The <b>Notes</b> field is a free text field. Any notes will be seen by the approver
Drag and Drop	Attach any supporting documentation, for example certificates

In the illustration below P B Redwood Ltd.'s certificate has been attached.

Attach current certificates and supporting documents

**Drag and Drop**  
Select or drop files here.

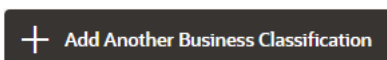
PB Redwood Ltd Certificate 01102024.docx

Last updated on 30/10/2024  
13.70 KB

+ Add Another Business Classification

To add another business classification:

12. Click on the **Add Another Business Classification** button.



13. Repeat the process to add as many business classifications as required.

At this point, you can save the page and return at a later date, or you can continue to the next page.

14. Click on the **Continue** button.

## Products and Services

The Products and Services page allows you to select the services your company offers. You may select more than one service from the list.

Supplier Registration

### Products and Services

Search by category or description

Category	Description
<input type="checkbox"/> ▶ Accounting	
<input type="checkbox"/> ▶ Analytics and Reports	
<input type="checkbox"/> ▶ Audio Visual	
<input type="checkbox"/> ▶ Audit / Risk	
<input type="checkbox"/> ▶ Banking Services	
<input type="checkbox"/> ▶ Branding	
<input type="checkbox"/> ▶ Cleaning Services	
<input type="checkbox"/> ▶ Communications	
<input type="checkbox"/> ▶ Conferences	
<input type="checkbox"/> ▶ Consulting	
<input type="checkbox"/> ▶ Debt Collection	
<input type="checkbox"/> ▶ Employee Benefits	

Updated just now

Cancel Save **Submit**

Use the search option to search by category or description for the services your company offers or select from the Category list.

More than one category can be selected.

**15.** Click on the Category you wish to include

In the illustration below, two services have been selected:

- Accounting
- Consulting

You can:

- View the selected services
- Clear the selected services

2 selected View Selected Clear Selected



Supplier Registration

## Products and Services

Search by category or description

2 selected View Selected Clear Selected

Category	Description
<input checked="" type="checkbox"/> ▶ Accounting	
<input type="checkbox"/> ▶ Analytics and Reports	
<input type="checkbox"/> ▶ Audio Visual	
<input type="checkbox"/> ▶ Audit / Risk	
<input type="checkbox"/> ▶ Banking Services	
<input type="checkbox"/> ▶ Branding	
<input type="checkbox"/> ▶ Cleaning Services	
<input type="checkbox"/> ▶ Communications	
<input type="checkbox"/> ▶ Conferences	
<input checked="" type="checkbox"/> ▶ Consulting	
<input type="checkbox"/> ▶ Debt Collection	

At this point, you can save the page and return at a later date, or you can continue to the next page.

16. Click on the **Continue** button

## Questionnaire

The final section you will need to complete is the Questionnaire. You will be asked questions about your company, for example the size of your organization and compliance questions. The questionnaire has three sections which you must complete:

- Company Information
- Trade Compliance
- Bank Details



Please ensure you provide as much information as possible, this will ensure your registration request is processed quickly. Please pay particular attention to the mandatory fields, which are indicated by the word **Required** beneath the relevant field. You cannot submit your request until all mandatory fields are completed.

Once a section of the questionnaire is completed a is displayed. A partially completed section is shown as . In the illustration below the Company Information and Trade Compliance sections have been completed and the Bank Details section is in progress.

When you have completed all six sections of the registration:

- Company Details
- Contacts
- Addresses
- Business Classifications
- Products and Services
- Questionnaire

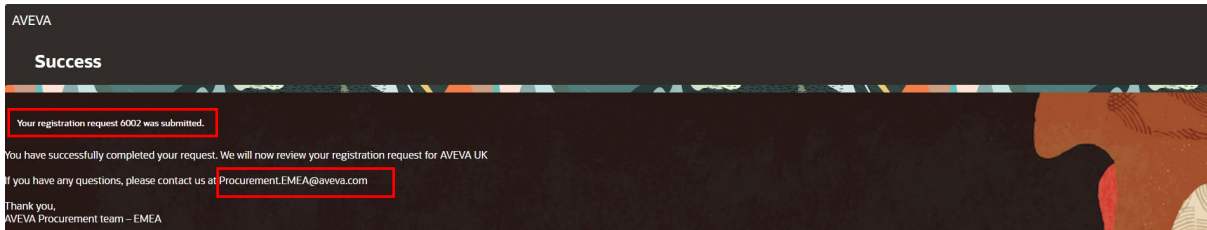
you can submit the Supplier Registration or save and submit later.

### 17. Click on the **Submit** button

A confirmation page is displayed confirming the successful submission of your request. A registration request number is automatically generated and displayed on the page in addition to the contact details of the relevant procurement team, should you have any questions.



Make a note of the registration request number. It will be used in all correspondence with the procurement team. You will need to include the registration number when checking the status of your registration request.

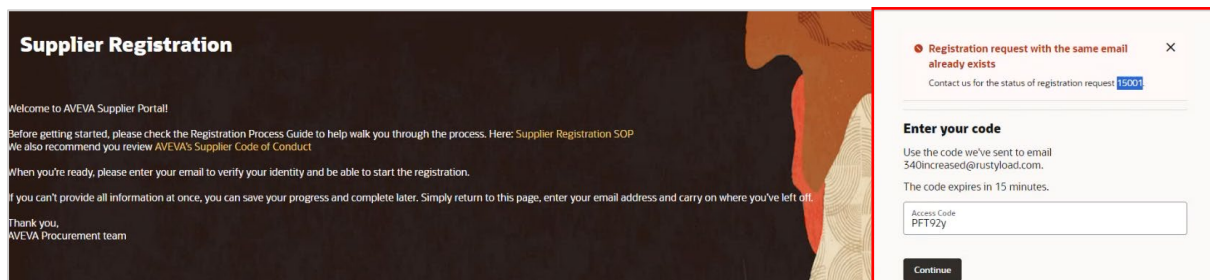


Once you submit the registration request, it is routed to the relevant procurement team for approval.



If you commence another supplier registration request while one is already being processed, you will receive the following error message:

In the example below, the user is informed that a supplier registration request with the request number 15001 is already being processed and that they should contact the Procurement team for a status update.



## Approval of a supplier request

The procurement team will receive a notification of the supplier registration request. The notification will include copies of the supporting documentation attached to the supplier registration application.

Action Required: Supplier Registration Request 6002 for P B Redwood Ltd

AP AVEVA Supplier Registration Approval - <procurement@aveva.com>  
To: bella2694@thegrampians.net

CAUTION - This message originated outside AVEVA

Access this task in the [Workspace Application](#) or take direct action using the links in this email:  
**Actions:** [Approve](#) | [Reject](#) | [Request More Info](#)  
 Access this task in the workspace application to send a reason for rejection to the requester.

**Supplier Registration Request 6002 for P B Redwood Ltd**

Details

Assignee: Daniela Eeritzbella	Registration Request: 6002	Approval Status: Pending Approval
Assigned Date: 10/30/24	Requested By: <a href="mailto:bella2694@thegrampians.net">bella2694@thegrampians.net</a>	Business Relationship: Prospective
Task Number: 5829638	Request Date: 10/30/24	Source: External
	Inviting Procurement BU: GB BU	Note to Approver: Additional insurance document to be added

Company Details

Company: P B Redwood Ltd	D-U-N-S Number
Supplier Type: External	Tax Country: United Kingdom
Tax Organization Type: Individual	Taxpayer ID
Corporate Web Site: <a href="http://www.PBRedwood.com">www.PBRedwood.com</a>	Tax Registration Number: *****

Attachments

Type	Category	File Name or URL	Title	Description	Attached By	Attached Date
File	From Supplier	<a href="#">PB Redwood Ltd Insurance Documentation.docx</a>	PB Redwood Ltd Insurance Documentation.docx		anonymous	10/30/24 1:12 PM
File	From Supplier	<a href="#">PB Redwood Ltd Tax Certificate.docx</a>	PB Redwood Ltd Tax Certificate.docx		anonymous	10/30/24 1:12 PM

The procurement team will review the supplier registration request. They have three options:

- Request Resubmit
- Reject
- Approve

**Request Resubmit:** The Procurement team may require some additional information; in this instance you will receive an email notification asking you to resubmit your application, included in the email is the reason why you are being asked to resubmit.

**Reject:** The Procurement team may reject your request, for example, it is a duplicate request, or our criteria has not been met; in this instance you will receive an email notification with a brief description of the reason.

**Approved:** Once the Registration Request has been reviewed and approved by the Procurement team you will receive an email.

The illustration below is an example of an approval notification:

Supplier Registration Request 6002 Was Approved

AP procurement@aveva.com  
To: bella2694@thegrampians.net; Fiona Bole

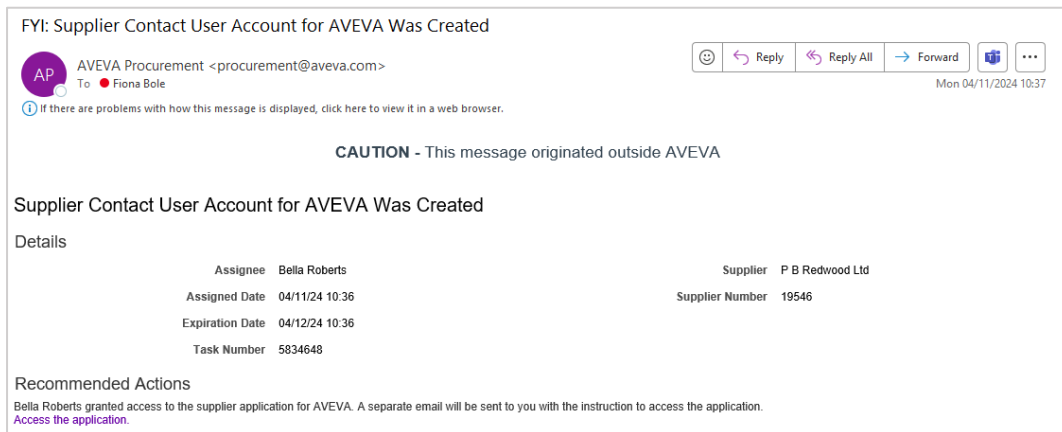
CAUTION - This message originated outside AVEVA

**AVEVA (GB BU)**  
Your Supplier Registration Request has been Approved

Request Number	6002
Request Date	30 October 2024
Requested By	<a href="mailto:bella2694@thegrampians.net">bella2694@thegrampians.net</a>
Company	P B Redwood Ltd

User account information will be sent in a separate email.

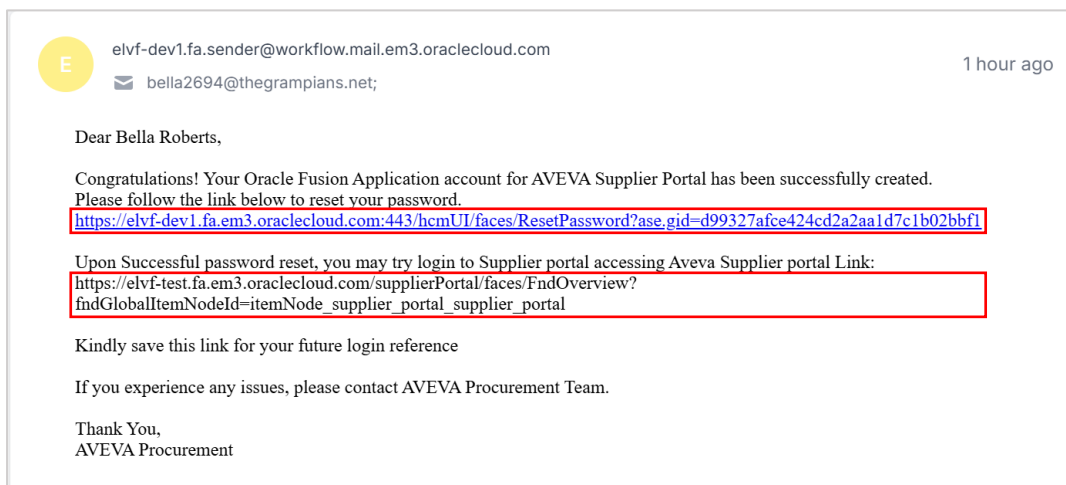
If your application is approved, you will receive an FYI notification informing you that your supplier account has been created.



You will also receive a notification with a hyperlink asking you to reset your password. Once you reset your password you will be able to log in to the Supplier Portal. Your AVEVA Supplier Portal link is included in the email.

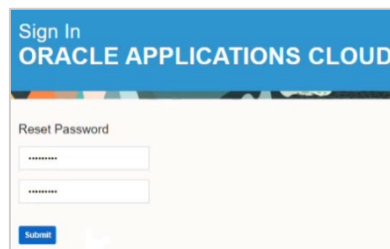
To access the AVEVA Supplier Portal:

1. Click on the hyperlink in the email



The Oracle application cloud page is displayed. You will be asked to reset your password before you can proceed.

2. Enter a new password
3. Confirm the password
4. Click on **Submit**
- 5.



# AVEVA Procurement contacts

If you have any questions, please contact your  
Procurement team in the relevant area:

## Americas

[Procurement.AMS@aveva.com](mailto:Procurement.AMS@aveva.com)

## APAC

[Procurement.APAC@aveva.com](mailto:Procurement.APAC@aveva.com)

## EMEA

[Procurement.EMEA@aveva.com](mailto:Procurement.EMEA@aveva.com)