AVEVA

Supplier Portal
Training Guide

Contents

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 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 familiarize 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:

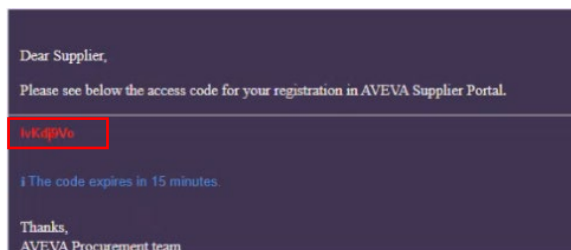1. Enter your email address
2. Click on the **send access code** button

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	Enter your company tax registration number Please note: The tax registration number field has a validation rule applied; this is to ensure the number is entered in the correct format In the United Kingdom for example, the format is a two-character country code plus 3, 7 or 10 digit numeric

Field	Data entry
	For example: • GB123 • GB1234567 • GB1234567890 This field becomes a required field once a country has been selected from the country field
D-U-N-S Number	
Organizational Type	**Individual** is displayed by default. You can select alternatives from the drop-down, for example, corporation, government agency, limited company etc.
Supplier Type	This field displays **External** 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	Attach supporting documentation, such as tax certificates, insurance certificates etc. These documents can be selected from a folder or dragged and dropped into the relevant field

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 **Yes** or **No**
Does this contact need a user account?	A user account 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 **Yes** or **No**
What user roles does this contact need?	Defaults to **AVEVA External Supplier Portal**

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

4. Click on **Add Another Contact** button

➕ **Add Another Contact**
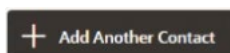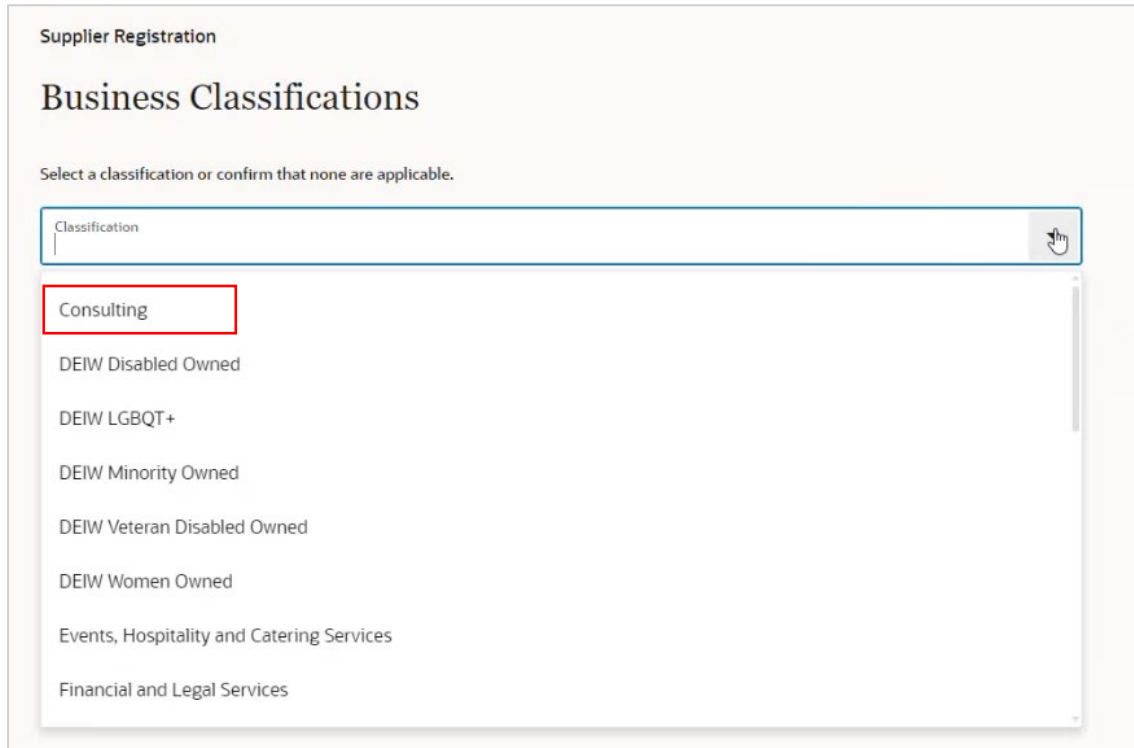
5. Repeat the process to add as many contacts as required

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

6. Click on the **Continue** button

Addresses

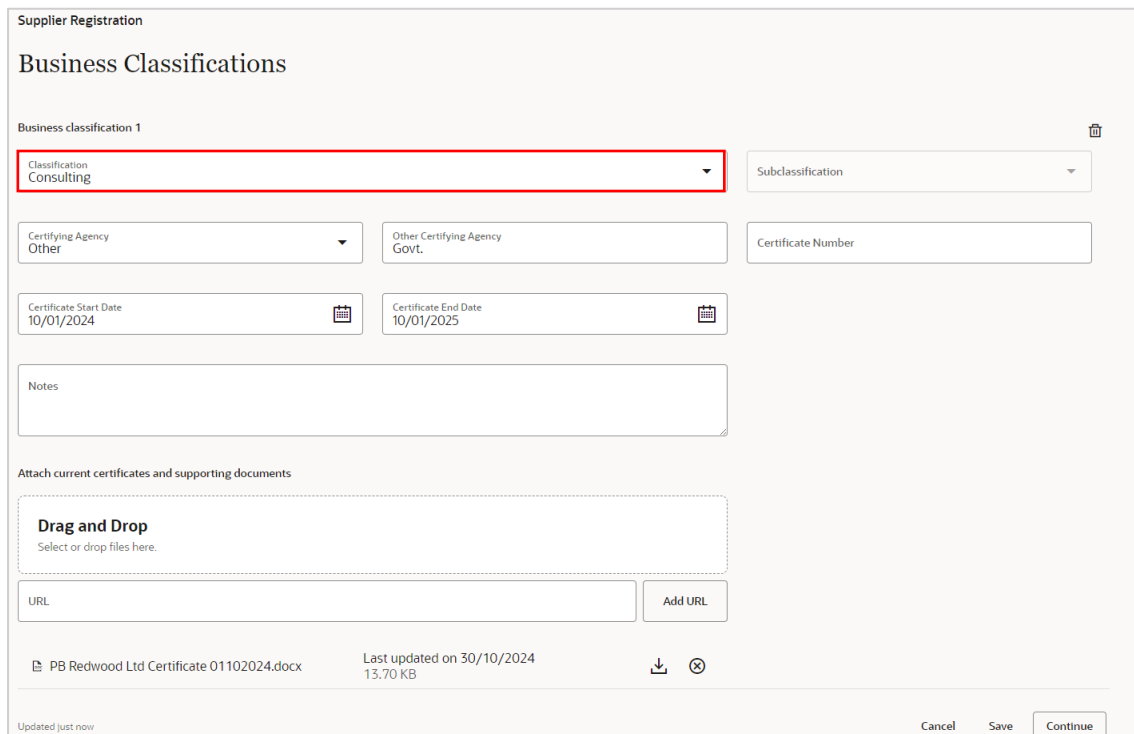The **Addresses** page is displayed. The address name must be entered in a specific format. For example to enter the address name for a supplier called P B Redwood based in Cambridge, UK, the following naming convention must be followed:

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:	
GB_CAM_PBRED_01	

7. Enter the **Address** details

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: • Receive Purchase Orders • Receive Payments • Bid on RFQs 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.

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

In the illustration below, Consulting has been selected.

Field	Data Entry
Classification	The classification will default from the previous screen
Certifying Agency	Select **Other**
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 **Drag and Drop** area
Certificate Start Date	
Certificate End Date	Enter the certificate start and end dates
Notes	The **Notes** 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.

To add another business classification:

12. Click on the **Add Another Business Classification** button.
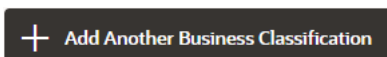
13. Repeat the process to add as many business classifications as required.

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.

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

Supplier Registration

Products and Services

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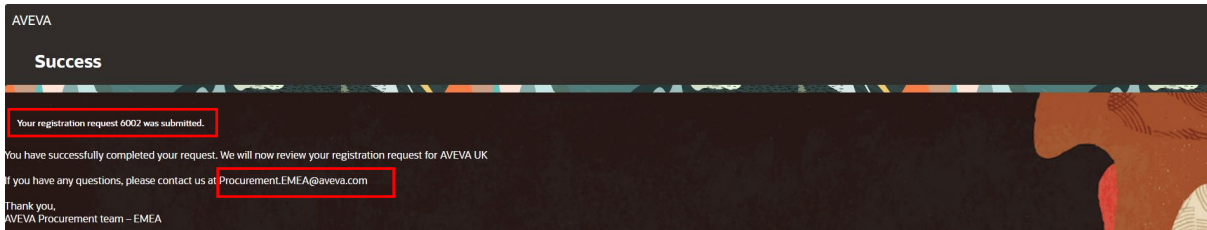
Once you submit the registration request, it is routed to the relevant procurement team for approval.

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.
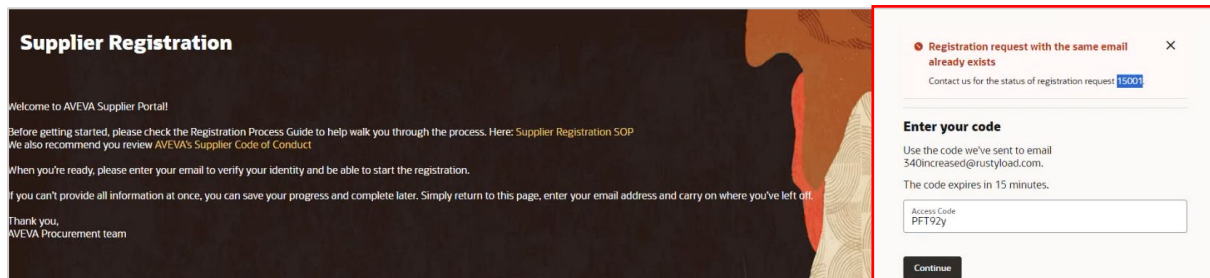
Approval of a supplier request

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.

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. The email will include 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 the request did not meet our criteria; in this instance you will receive an email notification with a brief description of the reason.

Approved: Once the 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:

If your application is approved, you will receive an FYI notification informing you that your supplier account has been created.
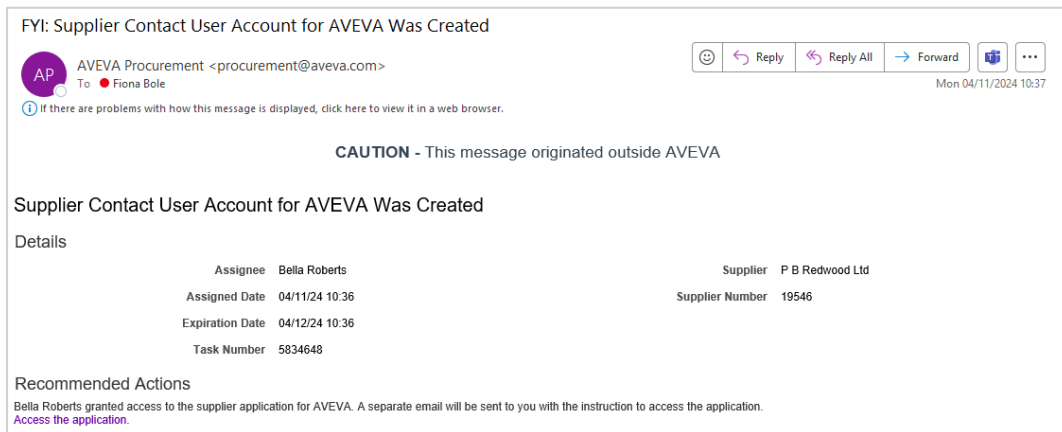
You will also receive a notification with a hyperlink asking you to reset your password.
Once you reset your password you will be able to log in to the Supplier Portal.
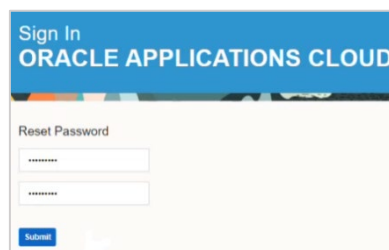Your AVEVA Supplier Portal link is included in the email.

To access the AVEVA Supplier Portal:

1. Click on the hyperlink in the email
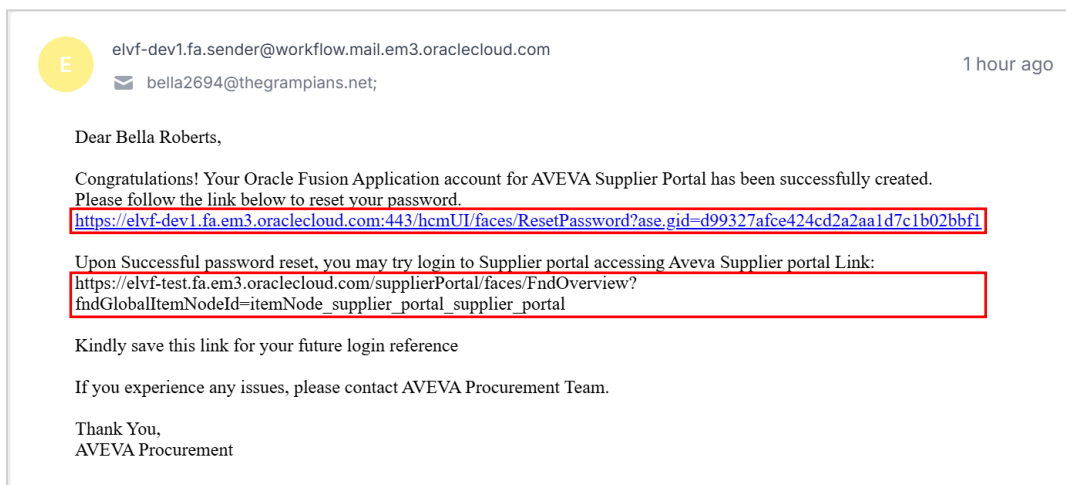
The Oracle application cloud page is displayed. You will be asked to reset your password before you can proceed.
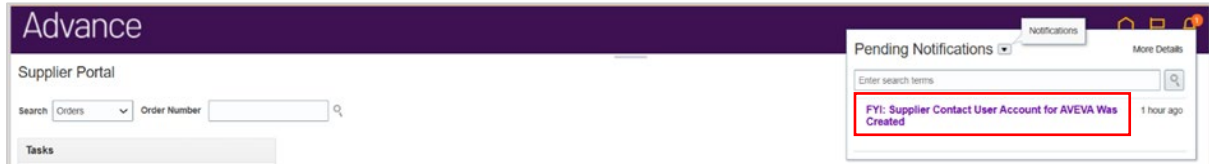
2. Enter a new password
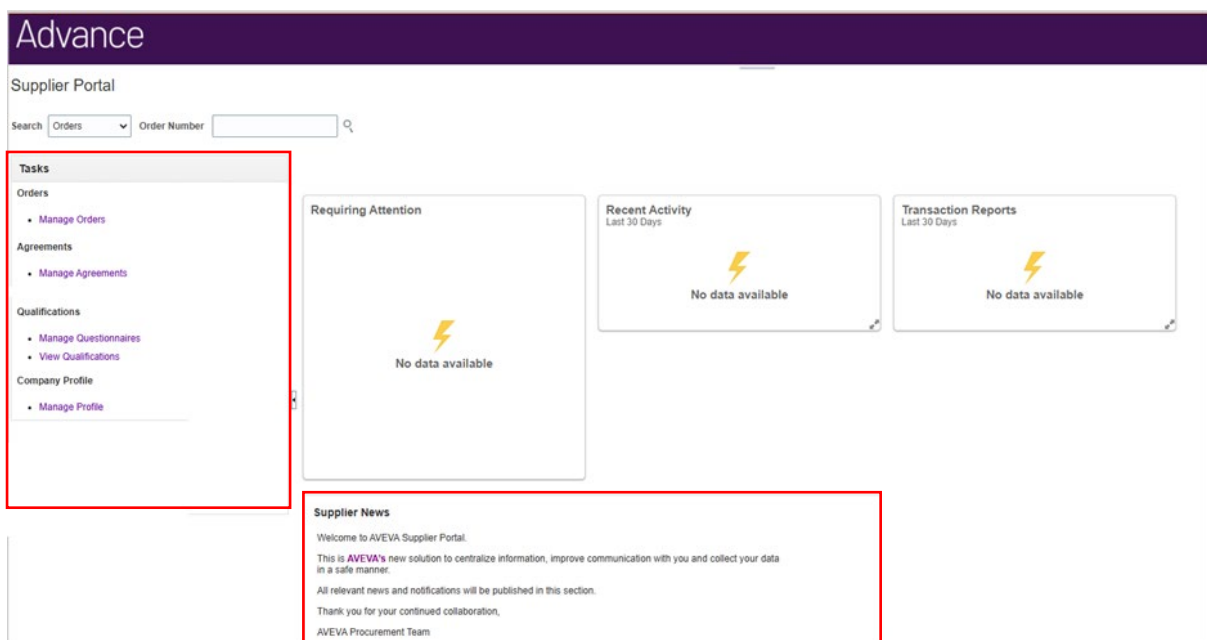3. Confirm the password
4. Click on **Submit**

The Supplier Portal

Prospective supplier

The Supplier Portal home page is displayed. You will receive a FYI notification in Oracle informing you that the supplier account has been created. At this stage you are a **Prospective Supplier.**

The Supplier Portal home page displays a list of tasks and supplier news.

Tasks

The **Tasks** menu is divided into the following sections:

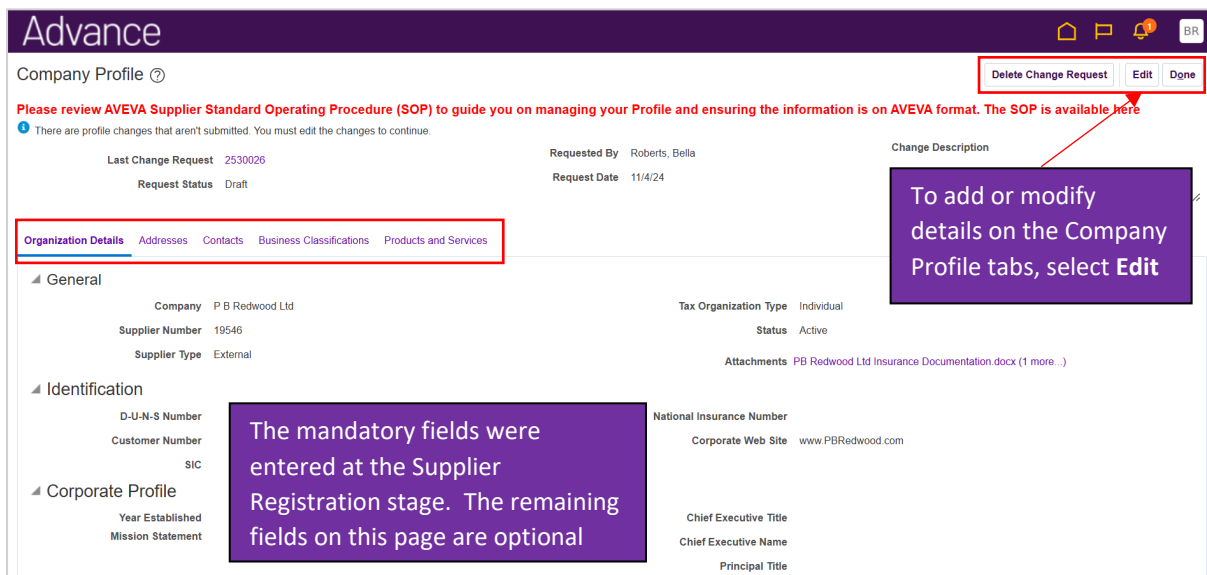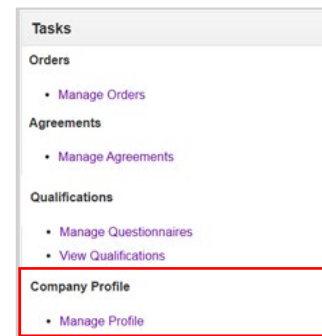| Orders	The first two tasks are not available until a supplier request has progressed from **Prospective Supplier** to **Spend Authorized**. It is at the Spend Authorized stage that AVEVA can begin to transact with a supplier.
Agreements	
Qualifications	You may be required to complete a questionnaire as part of the qualification process. The qualification process assesses whether a supplier will be promoted from a Prospective Supplier to a Spend Authorized supplier. You will receive a notification if the procurement team wants you to complete a questionnaire.
Company Profile	At any stage you can review the company details which were entered when the Supplier Registration form was completed

View and Edit Company Profile Details

To view the company details which were entered at the supplier registration stage and to add additional information:
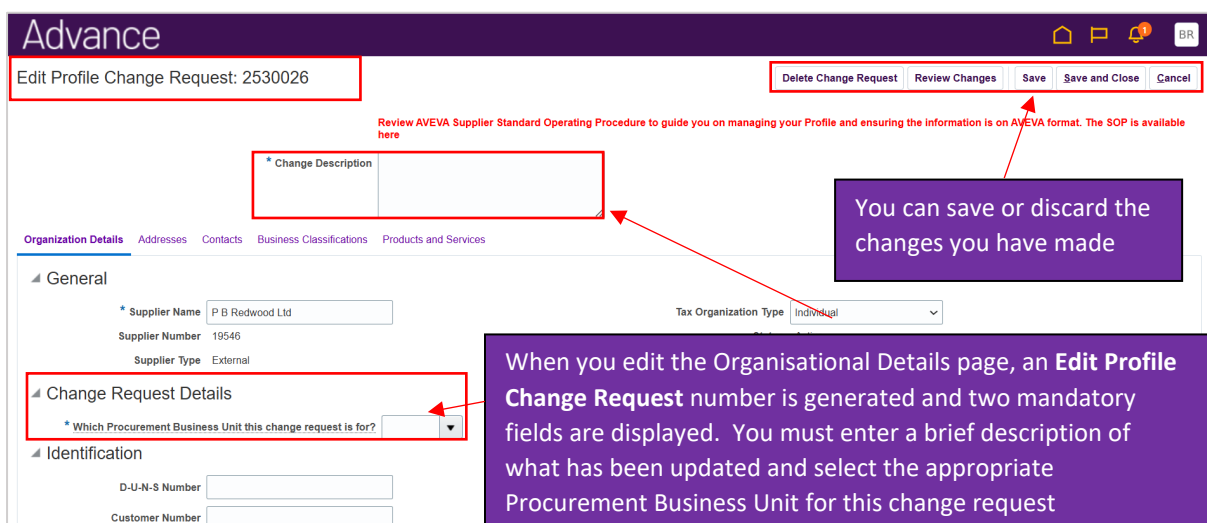
1. Click on **Manage Profile**

The Organization Details page is displayed, there are five tabs:

- Organization Details
- Addresses
- Contacts
- Business Classifications
- Products and Services

To add or modify details on the Company Profile tabs, select **Edit**

The mandatory fields were entered at the Supplier Registration stage. The remaining fields on this page are optional

2. Click on the **Edit** button

You can save or discard the changes you have made

When you edit the Organisational Details page, an **Edit Profile Change Request** number is generated and two mandatory fields are displayed. You must enter a brief description of what has been updated and select the appropriate Procurement Business Unit for this change request

3. Amend or add information, as appropriate

To view the Address page:

4. Click on the **Addresses** tab

The address name is displayed in the format:

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:	
GB_CAM_PBRED_01	

To view the Contacts page:

5. Click on the **Contact** tab

To add a new contact:

6. Click on **Actions**
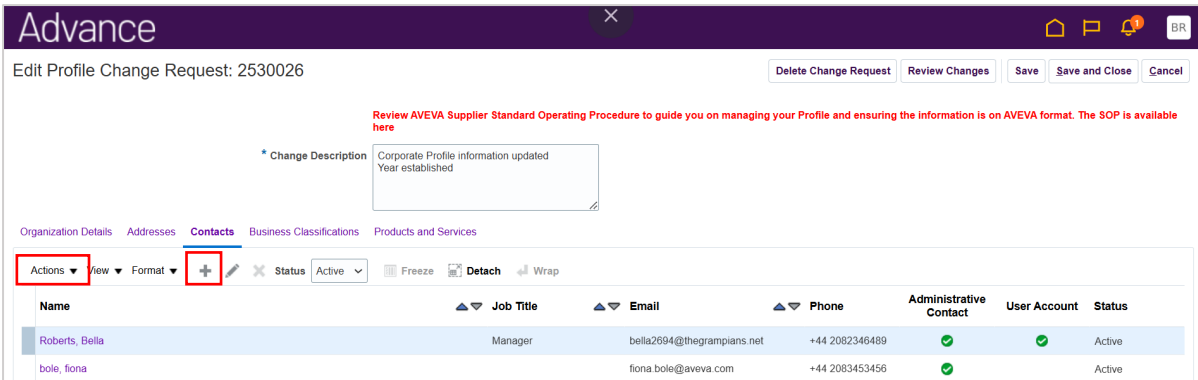
7. Add the **Contact** details

If the contact needs to receive general communications:

8. Check the **Administrative contact** field

If the contact needs to have access to the Supplier Portal:

9. Check the **Request user account** field

Ensure the checkboxes are ticked if the contact needs to receive communications from AVEVA and access to the Supplier Portal

Click on **Create Another** or **OK** to close
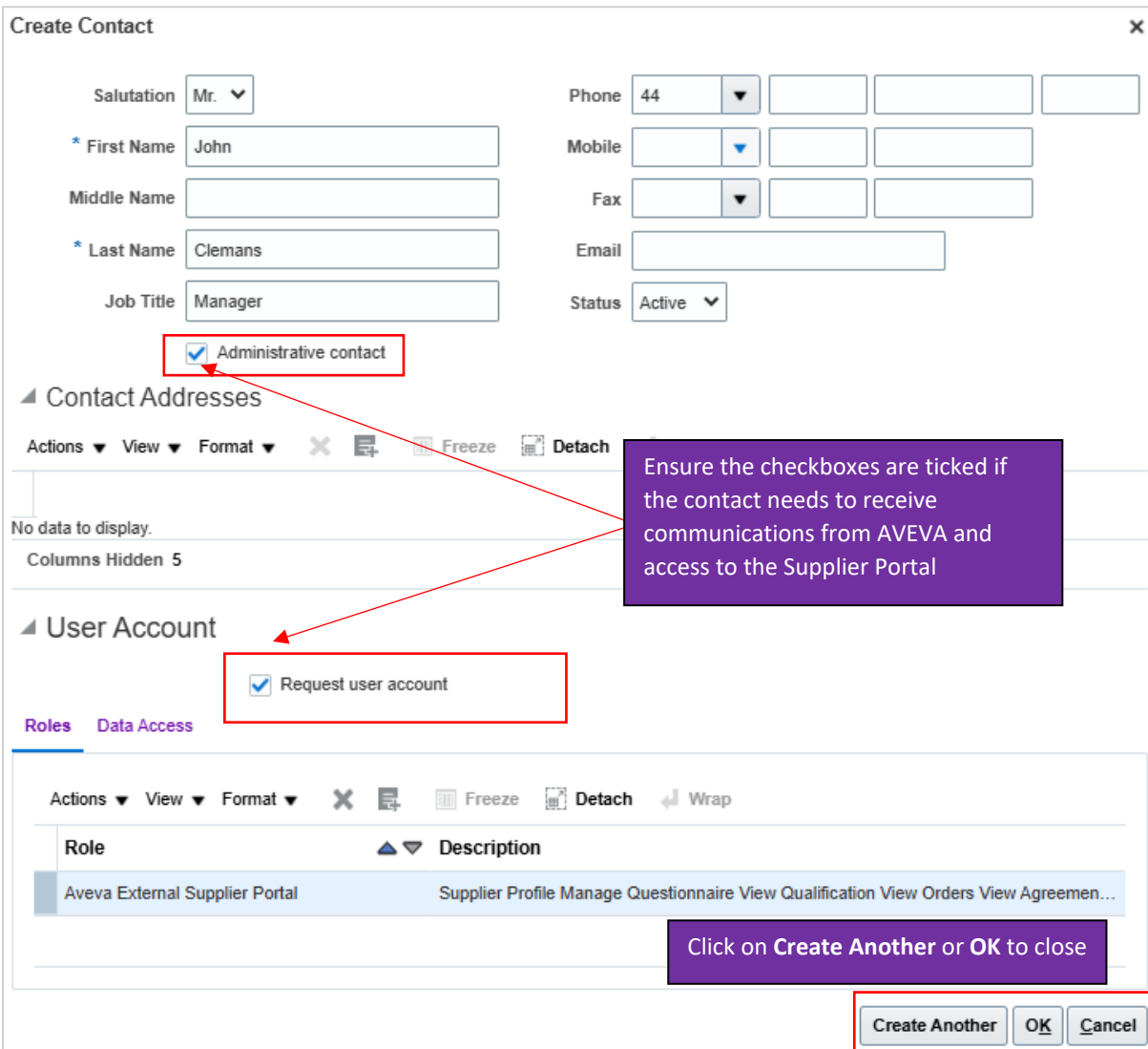
10. Click on the **OK** button

If you request a user account for the contact you are adding, the request will be sent for approval. Other changes to the company profile details, such as your address details or corporate profile will not require approval at the **Prospective Supplier** stage.

It is important to ensure that the address data is entered accurately and follows the required format. Incorrect or incomplete address information can lead to delays or failures in payment processing. **We strongly recommend reviewing and updating your address details carefully to avoid any disruptions in your payments.**

Once a supplier is **Spend Approved**, any amendments will be subject to approval.

To open the Business Classifications page:

11. Click on the **Business Classifications** tab

View the business classifications entered during the supplier registration process.

To add additional information:

12. Click on **Create** in **Actions**
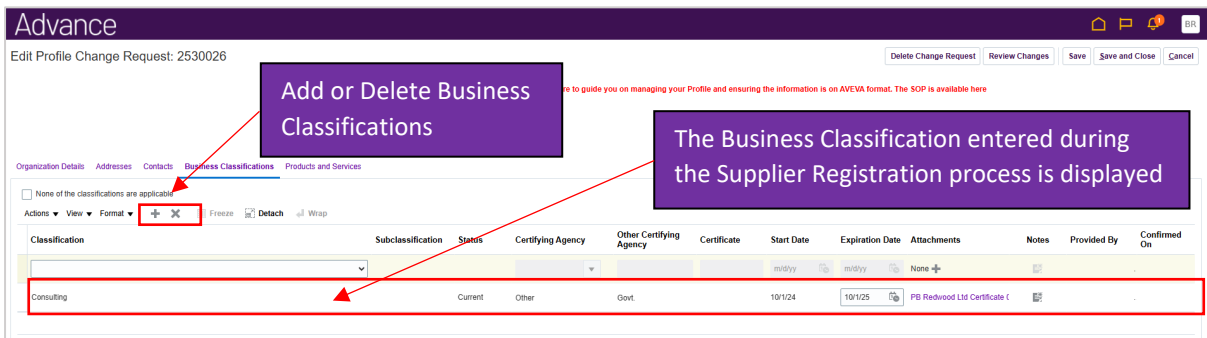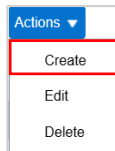
You can **Save** or **Save and Close** at any point. If you want to review or amend products and services:

13. Click on the **Products and Services** tab
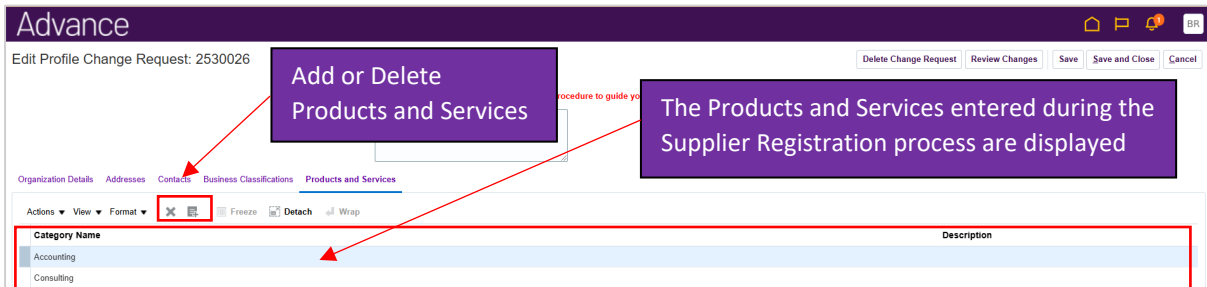
When you have completed amending the Supplier Profile information:

14. Click **Save** or **Save and Close**

A confirmation is displayed:

15. Click on the **OK** button

16. Click on the **Done** button

You can return to the Supplier Profile and view or amend the information at any time.

The supplier onboarding process is complete when your status as a supplier has progressed from **Prospective Supplier** to **Spend Authorized**. This means AVEVA can begin transacting with you and begin raising purchase requisitions and purchase orders.

You will receive an email notification informing you that your onboarding has been successful and that you are listed as a Spend Authorized Supplier.

The Supplier Portal

Spend Authorized Supplier

A Spend Authorized Supplier will be able to see recent activity when accessing the Supplier Portal home page.

In addition to the information you can view at the Prospective Supplier stage, you can see the status of your purchase orders from the **Tasks** menu and the info tiles**.**

View Recent Activity

To view the manage orders page and recent activity:

1. Click on the hyperlink

You can view the purchase order details and the lifecycle of the purchase order.

In the illustration below, two purchase orders are displayed. To view the purchase order details:

2. Click on the **Order** hyperlink

	Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
	GB-4401-510488	11/5/24		GB_CAM_PBRED_01	EMEA, Procure…	10,000.00	GBP	Open	⟳	11/5/24
	GB-4401-510487	11/5/24		GB_CAM_PBRED_01	EMEA, Procure…	5,000.00	GBP	Closed	⟳	11/5/24

To return to the Supplier Portal home page:

3. Click on the **Done** button
4. Click on the **Lifecycle** icon

	Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
	GB-4401-510488	11/5/24		GB_CAM_PBRED_01	EMEA, Procure…	10,000.00	GBP	Open	⟳	11/5/24
	GB-4401-510487	11/5/24		GB_CAM_PBRED_01	EMEA, Procure…	5,000.00	GBP	Closed	⟳	11/5/24

To return to the Supplier Portal home page:

5. Click on the **Done** button

AVEVA Procurement contacts

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

Americas
Procurement.AMS@aveva.com

APAC
Procurement.APAC@aveva.com

EMEA
Procurement.EMEA@aveva.com

aveva.com