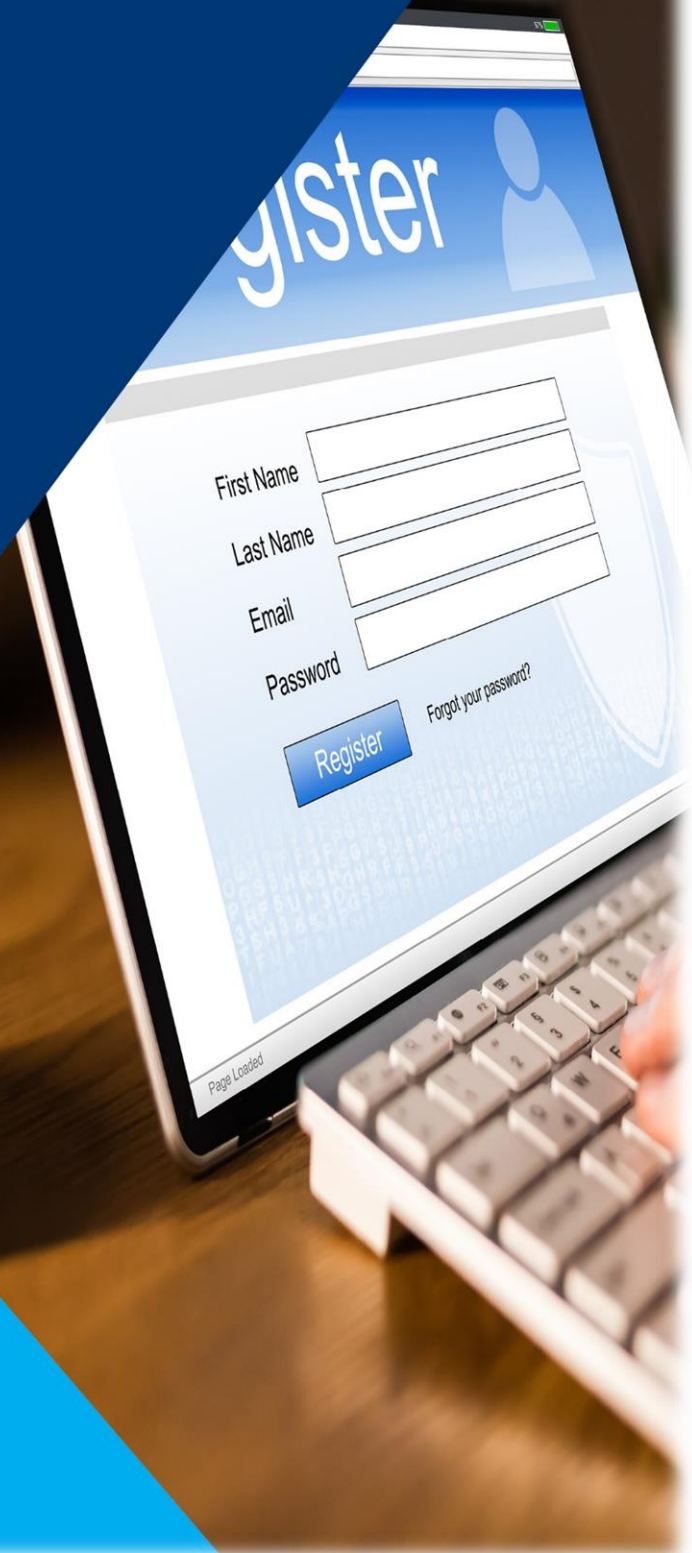# SUPPLIER PORTAL (ORACLE – FUSION) ON-BOARDING AND MAINTENANCE

Registration Guide

CORIX®

TABLE OF CONTENTS

SUPPLIER PORTAL OVERVIEW

Corix Supplier Portal (**Oracle – Fusion**) collaborates with our suppliers, providing complete visibility over the purchase-to-pay activities.

Corix will manage its suppliers in the Oracle Cloud for services and direct and indirect products purchased via this method.

❖ Direct procurement, also known as inventory, is defined as materials that, when converted, make a finished saleable product, and have system-maintained stock.

❖ Indirect procurement, also known as non-stocked, is defined as goods or services purchased to support the business operation which does not have system-maintained stock and are not converted into finished products or resold.

Corix will manage these procurement activities in the Supplier Portal (the "Portal"), including purchase orders, change orders, receipts, payments, and returns. Future sourcing activities may include contracts, requests for information, solicitations, and negotiations.

Ensuring that the information given to us by the supplier is correct and up to date will ensure that prompt payments will be made and without error.

SUPPLIER REGISTRATION

Existing suppliers doing business with Corix before August 1, 2022, in a phased approach, will be granted access to the Portal. The registration link for access to the Portal will be sent to the supplier's administrative contact via email. Corix will then provide further information on how to securely log into the Portal. For existing suppliers, please refer to the chapter, 'Supplier Portal: Logging in and Navigation.'

A registration link to the Supplier Portal will be emailed to all new suppliers that desire to do business with Corix. Please follow the instructions contained in the email and the information available within this Registration, to set up a new profile.

NOTE: If you cannot complete the registration in one sitting, ensure that you click **Save for Later** before leaving your workstation. If you do not, and your session times out, you will lose everything you've added since the last time you "**Saved for Later**".

 For your convenience, a video has been created to help walk you through this process

STEP 1:   COMPANY DETAILS

- This process starts with the **Register Supplier: Company Details** page. Update the fields as detailed in the steps below. Any fields marked with an asterisk (*) are mandatory fields.

a.   Enter the legal name of the company in the **Company** field. This is the name by which the company is identified.

b.   Select the relevant **Tax Organization Type** from the drop-down list.

c.   Choose the **Supplier Type** from the drop-down list.

d.   Add a website in the **Corporate Web Site** field if applicable.

e.   Please attach your organization's W9 form; if applicable, Certificate of Insurance; and any other form that could support the supplier application process can be added by clicking on the + icon in the **Attachments** field.

- Upload a file, add any text or provide a URL

- Click + icon again to add additional attachments

- Click OK to close attachments dialog box

f. The company tax information should be entered in one of three fields: **D-U-N-S Number, Taxpayer ID**, or **Tax Registration Number**.

    a. To add a Taxpayer ID and/or Tax Registration Number, you will need to enter a **Tax Country**. Start typing **United** and select United States from drop-down list.

g. Add in **Note to Approver** any supporting tax information.

h. Add **Your Contact Information** for the person that can be contacted in relation to the registration information entered in the **First Name, Last Name** and **Email** fields.

    a. You will be able to provide additional contact information for this contact in **Step 2**.

i. Click **Next** to continue. Alternatively, click **Save for Later** to save the information entered so far.

    a. **NOTE:** If you elect to use the **SAVE FOR LATER** button because you are not completing this process in one sitting, you will be warned that the **Taxpayer ID** and/or the **Tax Registration Number** will not be saved. Just make sure to update these fields before you **Register** your supplier account.
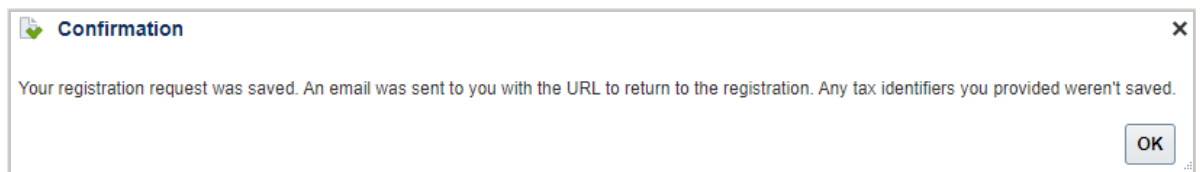
    b. Here is a sample email that you will receive when you click **Save for Later**
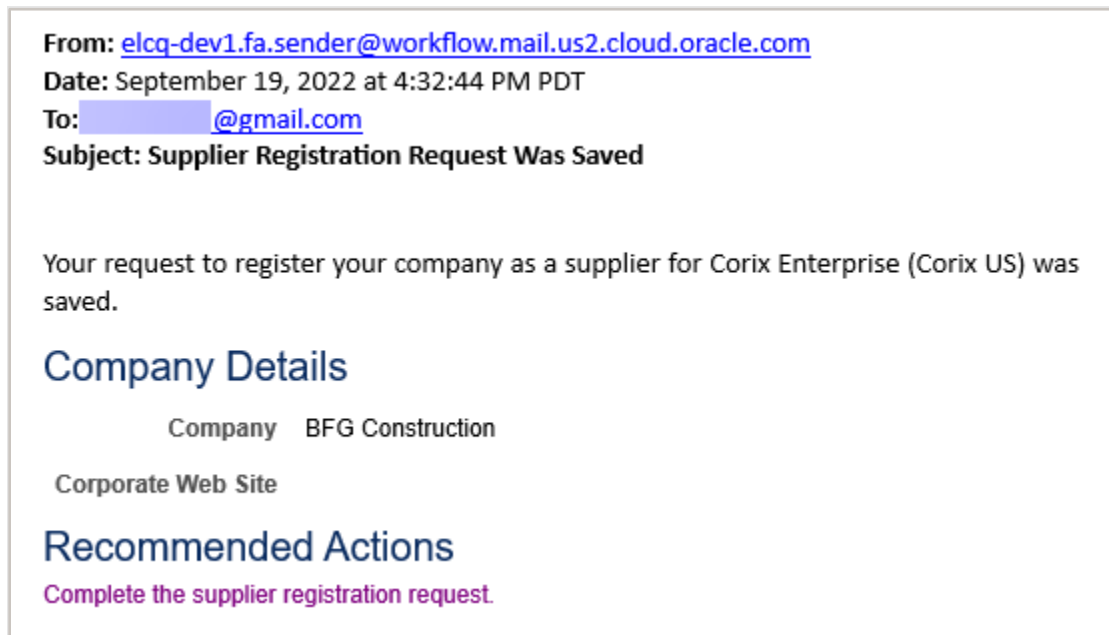
STEP 2: CONTACTS

- The contact information entered on the previous screen will automatically save as a contact against this supplier account. Further contacts can be added by clicking on the **+ Create** button. Alternatively, contacts can be **edited** or **deleted** at the line level using the relevant buttons.

- Add the applicable contact information. Fields marked with an asterisk (*) are mandatory fields. To provide the contact with access to the Supplier Portal, please ensure **Request user account** box is checked, and the appropriate **Role** is selected from the list available at the bottom of the screen. Click **OK** to save the information or **Create Another** to continue to adding contacts.

a. Note that the **Create Another** button is only available if you are creating more than one contact. If you are simply **editing** the contact added in Step 1, click **OK** to close this dialog box
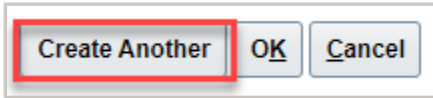
- Click on **Next** to continue.

    a. **If you clicked** Save for Later**, you will lose the** Taxpayer ID and/or Tax Registration Numbers

    b. Clicking the link in the email notification will return you to Step 1. Click Next to proceed the next step you need to complete in this process

STEP 3:   ADDRESSES

- Click on the Create icon to add in a new address. Multiple addresses can be added for different purposes. The address options are **for Remittance, for Ordering, and for Request for Quotation (RFQ) or Bidding**. Addresses can be created for multiple purposes according to the supplier's requirements.
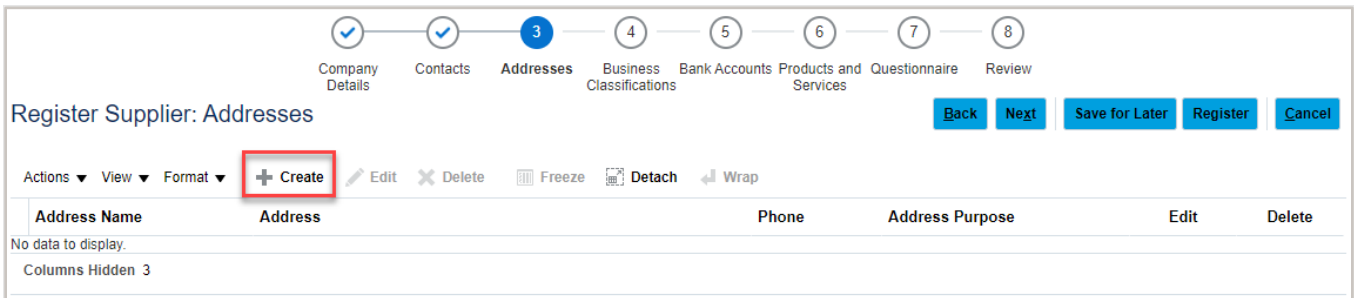
- Add the address information and select all relevant options in the **Address Purpose** from **Ordering**, **Remittance**, or **RFQ** or **Bidding**.

    a. For **Address Name**, enter the State abbreviation followed by a dash (-) and then your company initials followed by a dash (-) and then the address purposes type, i.e.: NY-PLFA-Ordering

- Contacts created previously in the Contacts page, can be associated to a specific site address using the **Select and Add** icon. After adding all the required information, click **OK** or alternatively click **Create Another** to add more addresses.

- When you Enter the City, a dialog box pops up to populate the State and County, and possibly the Postal Code. At least three fields are required

- Click on the **Next** button to continue or click **Save for Later** to receive an email notification with a link to return when ready to continue. Remember that the Taxpayer ID and Tax Registration Number will be deleted and will have to be re-entered before **Registering**.

STEP 4:   BUSINESS CLASSIFICATIONS

- Add all classifications that apply to your business or select the check box **for None of the classifications are applicable**. Corix is committed to working with and developing small and diverse suppliers that can deliver creative, high-quality products and services. Our goal is to diversify our supplier base by encouraging small, minority, women, and veteran-owned businesses to compete for business opportunities.

- Click on the **+** icon to create a new line. Select the **Classification** from the drop-down list and complete the relevant information for the line. Alternatively, if none of the available options are applicable, select the check box in the field **None of the Classifications are applicable**.

- Click on **Next** to continue or click **Save for Later** to receive an email notification with a link to return when ready to continue. Remember that the Taxpayer ID and Tax Registration Number will be deleted and will have to be re-entered before **Registering**.

STEP 5: BANK ACCOUNTS

Please Note: Bank account information will need to be verified by the Finance team to prevent security breaches and fraud. Please email the Finance team at suppliers@corix.com with any bank account related inquiries or enter a comment in **Note to Approver***.*

- Click **Create** icon to add bank account information. All Corix suppliers must accept electronic payment.

- Although only the **Country** and **Account Number** fields are mandatory, Corix also requires the *Bank Name* and *Branch Number*. If you Bank and/or Branch number is not found in the drop-down lists, then please make a request in the **Note to Approver** text box that indicates your Bank Name and/or Branch Number be added to the list.

- Select the **Country** from the drop-down list. The fields below this will change in accordance with any country specific detail. Add the bank account information as required. **Click OK to save**.

- Click **Next** to continue or click **Save for Later**. Remember that the Taxpayer ID and Tax Registration Number will be deleted and will have to be re-entered before **Registering**.

STEP 6:   PRODUCTS AND SERVICES

- This section details the products and/or services that the supplier's manufactures or provides which helps Corix to understand the capabilities of its supply base.

- Click on **Select and Add** to choose from the list of products and services available.

- Enter search criteria (keyword or industry name) in either in the **Category Name** or **Description fields**. To expand the search, click the **Category Name Folders** to continue to drill-down in the listing. You will find more detailed NAICS codes to add by selecting (checking) the box and adding them from the granular listing, then click on **Apply;** when done, select **OK** to save and return to the previous screen.

- Click on **Next** to continue or click **Save for Later** to receive an email notification with a link to return when ready to continue. Remember that the Taxpayer ID and Tax Registration Number will be deleted and will have to be re-entered before **Registering**.

STEP 7:   **QUESTIONNAIRE**

- The Heath, Safety and Environmental, Contractor Safety Program questionnaire is a set of questions that Corix asks all new suppliers before any onsite services or construction activities can be conducted. This **comprehensive** approach ensures the safety of Corix employees, facilities, visitors, contractors and their personnel and the environment.

- Answer all questions by selecting a response as required. Some of the questions will require supporting **documentation** be attached. This can be done by clicking on the **+** icon against any **Attachment** fields.

- Move between sections using the navigation panel or by clicking on **Next** or **Previous Section** buttons.

SECTION 1 – Services

- As you answer questions in Section 1 and 2, a sub-set of questions will appear based on your previous answers. Continue to answer all questions for each Section.

SECTION 2 – Safety Record

SECTION 3 – Conflict of Interest Acknowledgement

- Select the checkbox and then click the + sign to attach the completed form
- Click **Choose File** to select signed form and then click **OK**

- After all the questions have been answered, click on the **Next** button to continue, or click **Save for Later** to receive an email notification with a link to return when ready to continue. Remember that the Taxpayer ID and Tax Registration Number will be deleted and will have to be re-entered before **Registering**.

STEP 8:   REVIEW

- Go back and add **Taxpayer** ID and/or Tax Registration number if you had selected **Save for Later**

- This will **load** the **Register Supplier: Review** page. Review and ensure that the information that has been entered is correct.

- If any **changes** are required, click the applicable **Step number** at the top of the screen to return to that section and update as required. Then click on **Review** to complete this process.

- Click **Register** to **complete** the application. A confirmation message will display that the registration has been submitted. An email with the login details will be sent to the contact(s) that were registered.


Please Note:

*Registering for the Supplier Portal creates a **Prospective Supplier** account. Prospective suppliers can participate in negotiations and requests for information activity but cannot supply Corix with any goods or services until Corix approves them as **Spend Authorized**.*

When Corix's procurement and finance teams approve the Prospective Supplier, with the information provided above, or if a Prospective Supplier is successful in negotiation and awarded the business, Corix will promote the supplier account to **Spend Authorized**. After which, Corix may now transact business with the supplier.

SUPPLIER PORTAL: FIRST-TIME LOGIN PROCEDURES

- Once registered, Corix will need to approve the registration. An email will be sent to the Prospective Supplier's administrative contact to advise if the registration is approved.
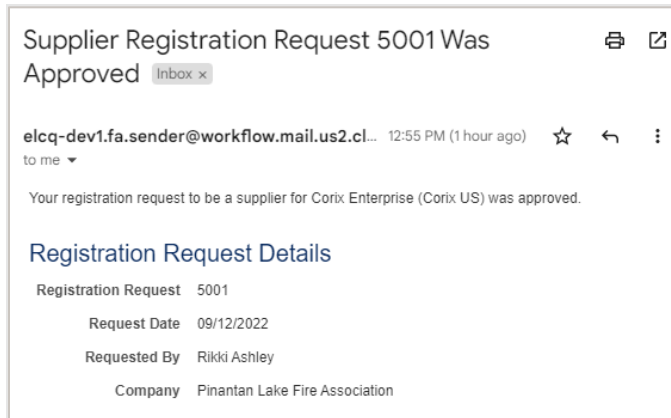
- Once Approved, the Supplier's contact will then receive an email notification for Okta registration, which is Corix's multi-factor authentication tool that allows you to securely login to the Fusion Supplier Portal.
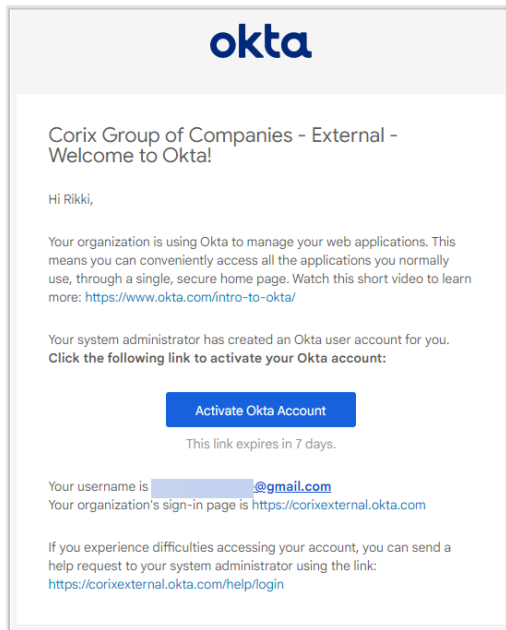
Refer to the **Corix Supplier Portal Okta Installation Guide** for instructions on setting up your organization's Okta (multi-factor authentication) profile.