SUPPLIER PORTAL– HOW TO SUBMIT AN INVOICE WITH A PO

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1. PURPOSE

Axos Supplier Portal is an online application that enables Axos Financial and our suppliers to communicate with each other via a secure portal. It enables suppliers to have real-time access to information such as purchase orders, invoice, and payment information.

The purpose of this document is to familiarize our suppliers to use the Axos Supplier Portal.

2. BENEFITS OF USING AXOS SUPPLIER PORTAL:

- Reduce the transfer of sensitive information via email.
- The Payment Portal will provide vendors with the ability to directly enter AP invoices against Axos Purchase Order (PO) lines reducing payment delays.
- View purchase order information from Axos Financial.
- Will provide real-time payment status information to our suppliers via the Payment Portal.
- Allow the supplier to update their contact information directly through the portal, reducing delays in payments to our vendors.

3. DEFINITIONS

- ERP- Enterprise Resource Planning
- AP- Account Payables
- Supplier Portal - Vendor Portals, also known as Supplier Portals, are platforms that allow businesses to connect and collaborate with their third-party suppliers on the internet.
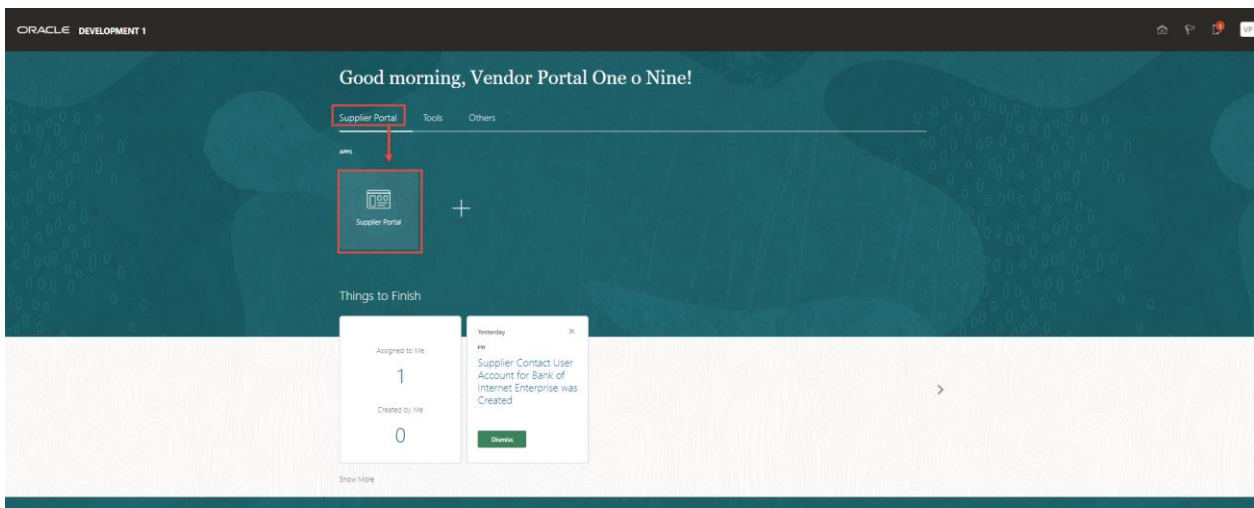
4. SUPPLIER PORTAL

Oracle Fusion Supplier Portal is a browser-based, supplier self-service solution.
Login to Oracle Applications Cloud using the URL provided during the registration process.

5. INVOICING AGAINST A PURCHASE ORDER

From the Sign In page, enter the username and password.
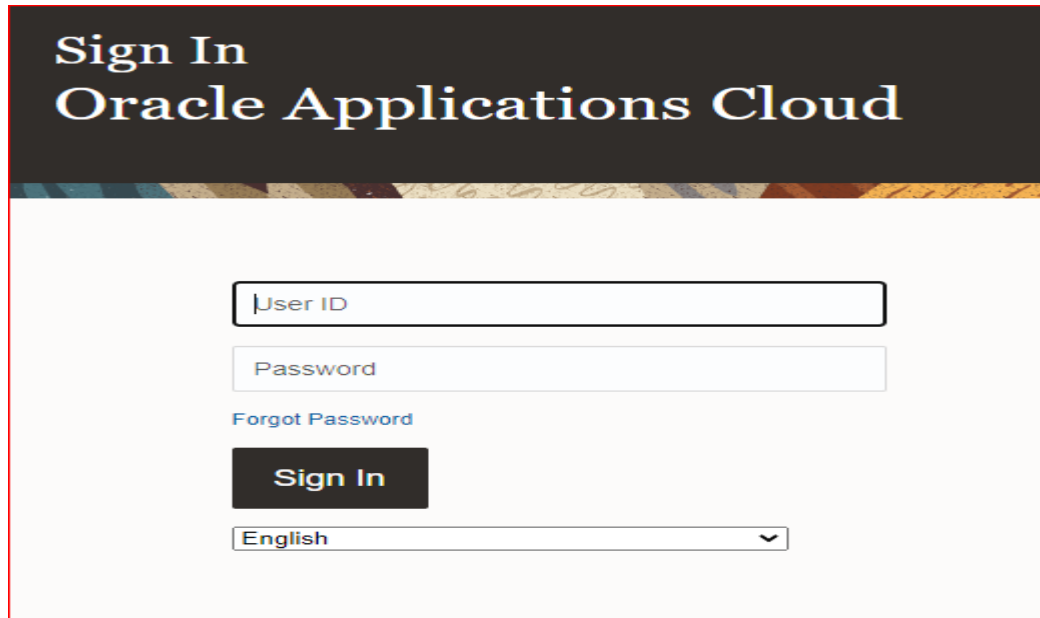
5.1 Select the Supplier Portal tile

Next, navigate to the Task menu on the left-hand side, then to the "Invoices and Payments" section.

5.2 Select the Create Invoice task

To create an Invoice, you must have a purchase order.

Selecct the "Identifying PO" field and select the appropriate Purchase order.

5.3   All fields that have asterisks (*) must be completed

Note: When selecting the Supplier Site, ensure the address that defaults to the site is up to date as checks are mailed to this address. Add any additional attachments including copies of the original invoice. The value in the "Date" field should match the invoice date in the attachments.

5.4 Invoice Number:

In the Number field enter the invoice number. It must be a unique number and can't be a duplicate.

Use the calendar to input the Date; the date must be current or future date.

The description is a required field.

5.5 Scroll down and chose the "Select and Add" icon under the Items section and identify the purchase order line

Select the PO line.

Choose the Apply button.
Choose the OK button.

5.6   Review the quantity or amount available to apply against the invoice

5.7   Error Message

If the invoice quantity or amount is more than the purchase order quantity or amount, then the below error message is raised.
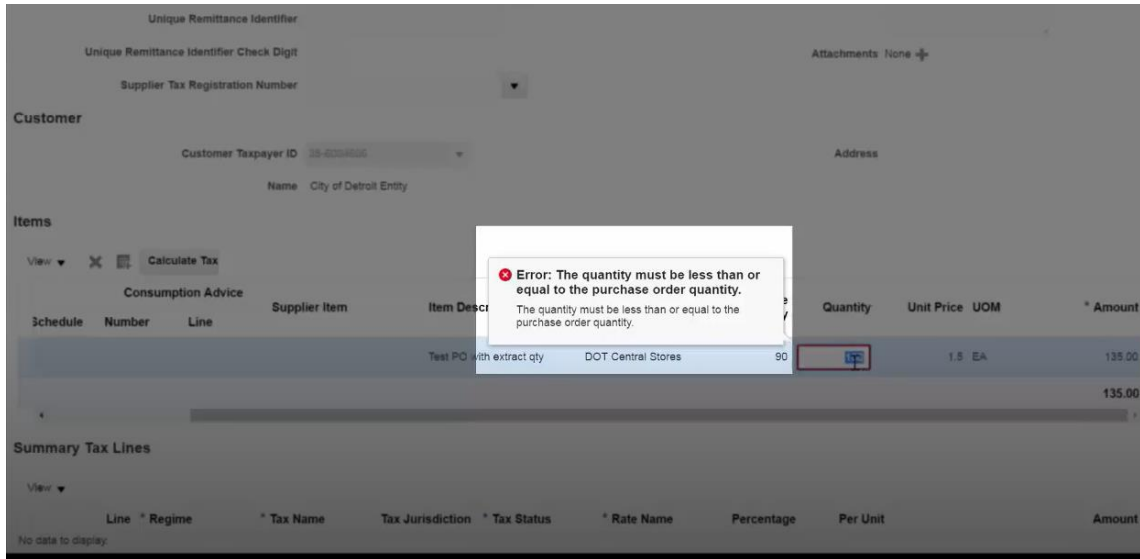
Once the invoice quantity or amount have been adjusted to values open for invoicing against the selected purchase order, scroll up and choose the Submit button after adding any needed attachments include the original invoice.
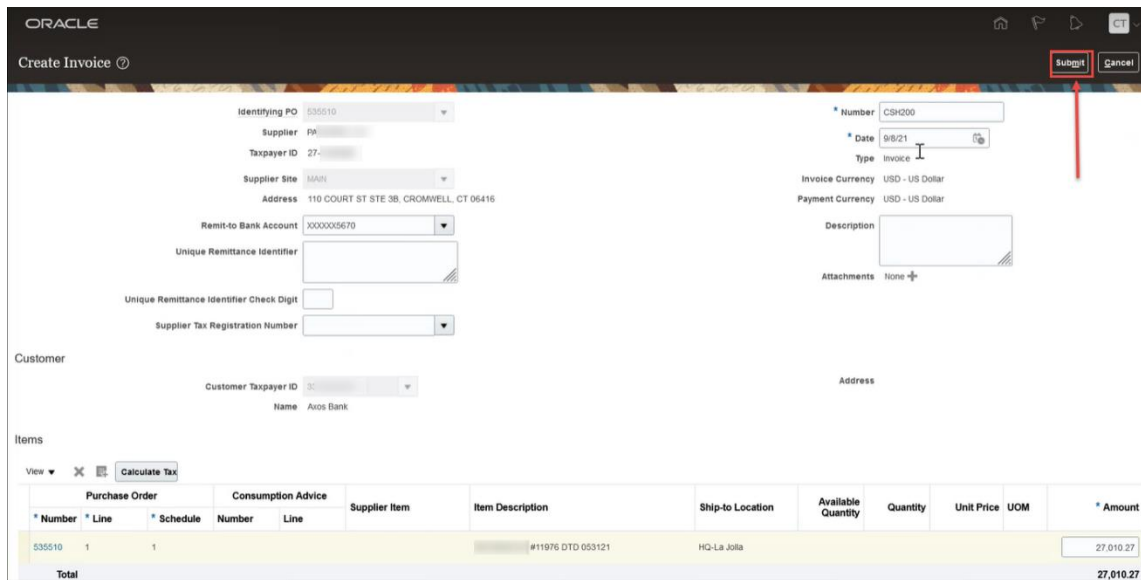
5.8   Receive the confirmation number

As soon as you submit the invoice, you will receive a confirmation number.

The above screen indicates that the invoice has been submitted.

Choose the OK button. Select the Create Another or choose the Done button to navigate back to the Supplier Portal homepage.

Note: once an invoice is submitted, it cannot be changed. To correct a previously submitted invoice, create a new invoice, and select invoice Type "**Credit memo**". The corresponding quantity or amount entered will be negative.

5.9 Options after submitting an invoice
After the invoice has been submitted, you will have options to choose Printable Page, Create Another, or Done.

5.10 Select the Done button to complete the Invoice creation use case