Enterprise Resource Planning Solution Contractor Orientation

AGENDA

- 💧 DC Water ERP Overview

- 💧 Part 1: Vendor Registration

- 💧 Part 2: Manage Profiles
  - ➢ Profile Addresses
  - ➢ Products and Services

- 💧 Part 3: Viewing and Responding To Solicitations

- 💧 Part 4: Submitting and Viewing Purchase Orders
  - ➢ Acknowledging Purchase Orders

- 💧 Part 5: Submitting and Viewing Invoices

Part 2: Managing Profiles
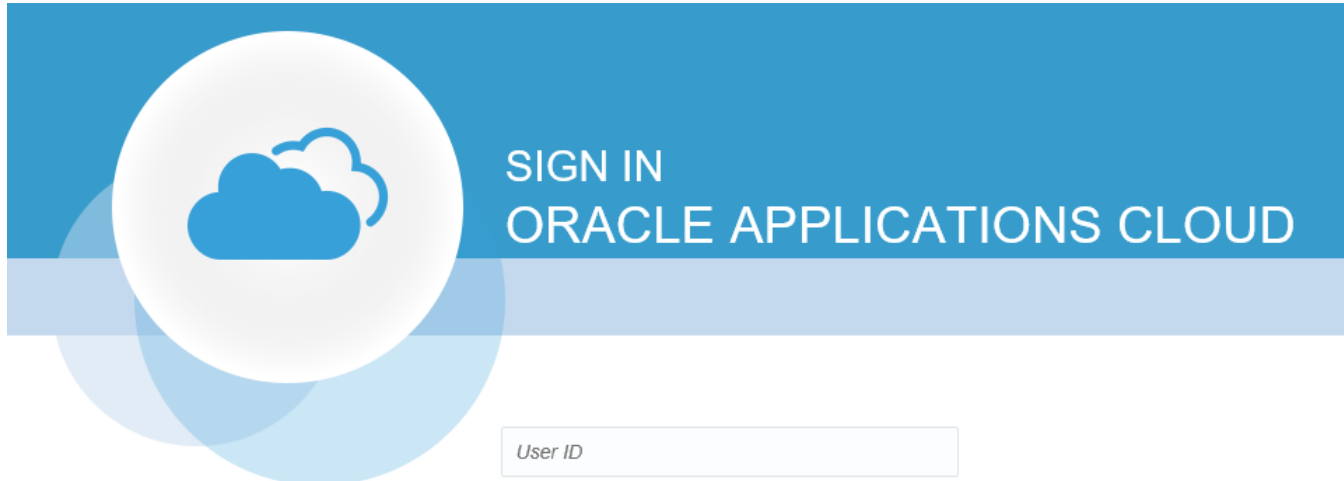
Part 2: Managing Profiles - Scenario

Company Profile

Firm Name:	XYZ Corporation	**Address:**	555 Anywhere St
Tax Organization:	Corporation	**City:**	Oxon Hill
Supplier Type:	Construction Service	**State:**	MD
Website:	www.xyz.com	**Zip:**	20745
Duns Number:	555555555	**Address Purpose:**	Ordering/Remit To/RFQ or Building
Tax Country:	United States of America	**Firm Phone:**	202-555-5555
Tax ID:	26-4563123	**Firm Email:**	procurements@xyzcorp.com
DC Tax Registration:	N/A	**Certification:**	DBE
First Name:	George	**Certified By:**	MDOT
Last Name	Washington	**Cert Date:**	1/1/2020
Email:	jamal.jones@dcwater.com	**Review Date:**	12/31/2022
Tel:	202-555-5555	**Products/Services:**	Chemical

District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager

SIGN IN
ORACLE APPLICATIONS CLOUD

User ID

Password

Forgot Password

Sign In

English

Go to DC Water's Procurement Web Site

1) Open your **Internet Browser**. CHROME is the preferred web browser for the DC Water application.
2) Go to the **DC Water** website: **https://www.dcwater.com**.
3) Click on **Work with Us** on the menu options then click the **Procurement** link followed by the **DC Water Supplier Registration link**. The page also includes a link for DC Water Supplier Portal log-in and DC Water Solicitation Abstracts (Solicitation Listing).
4) Enter Your username (contact email) and password

Good morning, George Washington!

Supplier Portal   Tools   Others

APPS

Supplier Portal

Step 5

Access Supplier Portal

5)   Click on the Supplier Portal icon to access the system (including your firm's profile).

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Supplier Portal

Order Number

Tasks

Orders
- Manage Orders
- Manage Schedules
- Acknowledge Schedules in Spreadsheet

Agreements
- Manage Agreements

Shipments
- Manage Shipments
- Create ASN
- Create ASBN
- Upload ASN or ASBN
- View Receipts
- View Returns

Deliverables
- Manage Deliverables

Consigned Inventory
- Review Consumption Advices
- Review Consigned Inventory
- Review Consigned Inventory Transactions

Invoices and Payments
- Create Invoice
- View Invoices
- View Payments

Solicitations
- View Active Solicitations
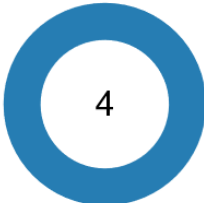- Manage Responses

Qualifications
- Manage Questionnaires
- View Qualifications

Company Profile
- Manage Profile

Requiring Attention

4

4

■ Negotiations Closing Soon

Recent Activity
Last 30 Days

No data available

Transaction Reports
Last 30 Days

No data available

Supplier News
This is the Supplier News !!!

Step 6

Access Firm's Profile

6) Click the link "Manage Profile" to begin updating adding your firm's additional information.

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Company Profile ⑦

Edit | Done

Step 10

Organization Details | Tax Identifiers | Addresses | Contacts | Payments | Business Classifications | Products and Services

◢ General

Company	XYZ Corporation
Supplier Number	100026
Supplier Type	Chemical

Tax Organization Type	Corporation
Status	Active
Attachments	None

Step 8

◢ Identification

D-U-N-S Number	646464648
Customer Number	
SIC	

National Insurance Number	
Corporate Web Site	

◢ Corporate Profile

Year Established	
Mission Statement	
Year Incorporated	

Chief Executive Title	
Chief Executive Name	
Principal Title	
Principal Name	

◢ Financial Profile

Current Fiscal Year's Potential Revenue	
Preferred Functional Currency	
Fiscal Year End Month	

Access Firm's Profile

7) This is the main page of the Contractor Profile. Information added during the registration process is carried over.
8) Please also note, your firm is now assigned a new Supplier number.
9) There are seven (7) pages connected with the Company Profile: Organization Details; Tax identifiers; Addresses; Contacts; Payments; Business Classifications; Products and Services.
10) To make edits to the profile click the "edit" button.

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National Insurance Number

⚠ **Warning**   ✕   Veb Site

POZ-2130390Making edits will create a change request for the profile. Do you want to continue?

Yes   No

nef Executive Title

Step 10

Access Firm's Profile

11) When you click edit the above confirmation screen will appear.
12) Click "Yes" to continue the editing process.

Access Firm's Profile

In the Organization Details Page, the following information can be added/updated.

General

Name	Description	How Managed
Company	Legal Name of Firm. Carried over from initial registration.	Click To Update
Supplier Number	A System generated identification number for each firm.	Cannot Be Changed
Supplier Type	Primary activity of the firm. Carried over from initial registration.	Click To Update
Tax Organization Type	Corporate structure of the firm. Carried over from initial registration.	Click To Change
Status	Status of the firm in the Vendor Portal.	Cannot Be Changed
Attachment	Corporate Profile, Capability Statement	Click To Upload

Access Firm's Profile

In the Organization Details Page, the following information can be added/updated.

General

Name	Description	How Managed
D-U-N-S Number	Firm's DUNS number. Carried over from initial registration.	Click To Change
Customer Number	A System generated identification number for each firm.	Cannot Be Changed
SIC	The Standard Industrial Classification code(s) associated with the firm	Click To Add
National Insurance Number	The firms Tax id# (If domiciled in the UK)	Click To Add
Corporate Website	Firm's web address. Carried over from initial registration.	Click To Change

Access Firm's Profile

In the Organization Details Page, the following information can be added/updated.

Corporate Profile

Name	Description	How Managed
Year Established	Year firm was established	Click To Add
Mission Statement	A summary of the firm's mission.	Cannot Be Changed
Year Incorporated	Year firm was incorporated (if different)	Click To Add
Chief Executive Title	Title o f Chief Officer (President, CEO, Managing Partner, etc)	Click To Add
Chief Executive Name	Name of Chief Officer	Click To Add
Principal Title		
Principal Name		

Access Firm's Profile

In the Organization Details Page, the following information can be added/updated.

Financial Profile

Name	Description	How Managed
Fiscal Year End Month		Click To Select
Current Fiscal Year's Potential Revenue		Cannot Be Add
Preferred Functional Currency		Click To Select

Access Firm's Profile

In the Tax identifier Page, the following information can be added/updated.

Income Tax

Name	Description	How Managed
Taxpayer Country	A geographic area where a tax is levied by a specific tax authority.	Click To Select
Taxpayer ID	Firm's Tax Id number. Carried over from initial registration.	Click to Update
Federal Reportable	Confirm that the firm is subject to federal withholding	Click to Confirm
Federal Income Tax Type	Firm's Income Tax Type	Click To Select
State Reportable	Confirm that the firm is subject to state withholding	Click to Confirm
Tax Reporting Name		
Name Control	Derived from a taxpayer's name that is used by IRS in processing the tax return filed by the taxpayer	Click to Add
Verification Date	The **date** that the Revenue of the Company for the Second Period is verified by the Company's auditors.	Click to Add
Withholding Tax Group		Click to Update

Access Firm's Profile

In the Tax identifier Page, the following information can be added/updated.

Transaction Tax

Name	Description	How Managed
Tax Country		Click To Select
Tax Registration Number	The registration of a party with a tax authority that confers tax rights and imposes certain tax obligations.	Click to Update
Tax Registration Type		Click to Confirm

Access Firm's Profile

In the Addresses Page, the following information can be added/updated.

Addresses

Address information is carried over from the registration page. Click the "+" sign to make updates.

Access Firm's Profile

In the Contacts Page, the following information can be added/updated.

Contacts

Contact information is carried over from the registration page. Click the "+" sign to make updates.

Access Firm's Profile

In the Payments Page, the following information can be added/updated.

Payments

Edit Profile Change Request: 13002

Delete Change Request | Review Changes | Save | Save and Close | Cance

You must click Review Changes to submit

Change Description

Organization Details | Tax Identifiers | Addresses | Contacts | **Payments** | Business Classifications | Products and Services

Payment Methods

Actions ▼ View ▼ Format ▼ ➕ ✖ ✅ | ▥ Freeze | ▣ Detach | ▨ Wrap

Default	Payment Method	From Date	To Date
	Check	10/2/08	m/d/yy
	Electronic	10/2/08	m/d/yy
	Employee Card	1/1/51	m/d/yy
	Outsourced Check	10/2/08	m/d/yy
	Wire	10/2/08	m/d/yy
	ePay	1/1/51	m/d/yy

Select the Contact information is carried over from the registration page. Click the "+" sign to make updates.

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Access Firm's Profile

In the Business Classifications Page, the following information can be added/updated.

Business Classifications

Edit Profile Change Request: 13002

Delete Change Request | Review Changes | Save | Save and Close | Cancel

You must click Review Changes to submit

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

☐ None of the classifications are applicable

Actions ▼ View ▼ Format ▼ ✚ ✖ ☐ Freeze ☐ Detach ⤶ Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On
Disadvantaged Business Enterprise		Current	Maryland Department of Tran			1/1/20	12/31/22	None ✚			

Business Classification information is carried over from the registration page. Click the "+" sign to make updates.

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Access Firm's Profile

In the Products and Services Page, the following information can be added/updated.

Products and Services Classifications

Products and Service information is carried over from the registration page. Click the "Actions" button to make updates.