

**ATCO**

Oracle Cloud

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**Supplier Portal**



March 2024

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## Icon Legend

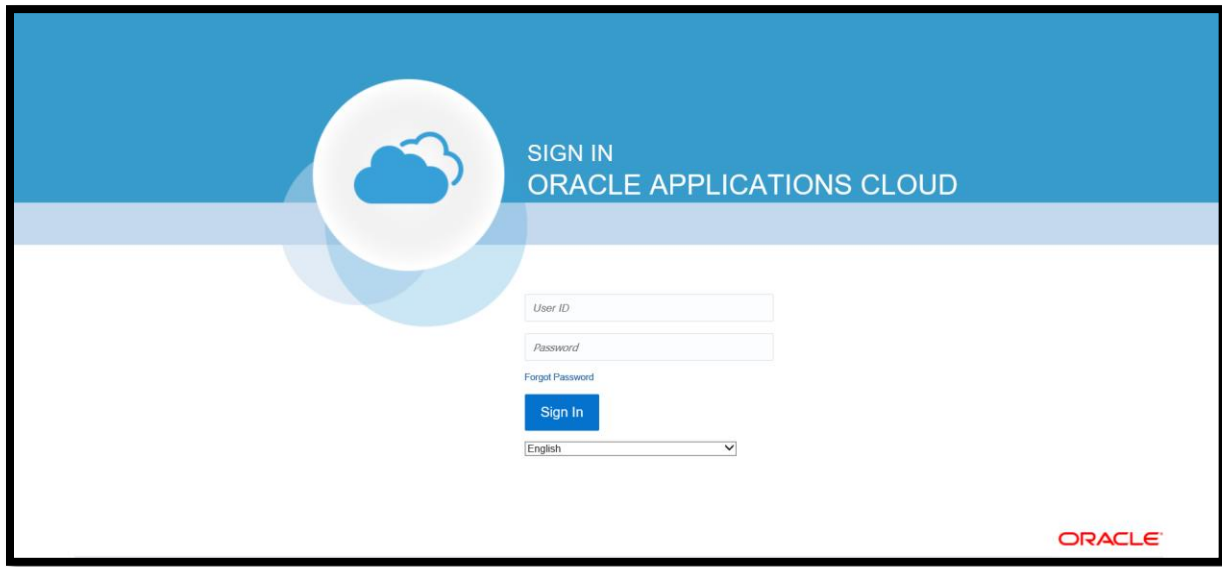
These icons act as cues for various information and activities throughout the document.

	<b>Note:</b> Hint, tip, trick or prompt: related to instruction or content.
	<b>Additional Information:</b> Providing background and context to the described steps.

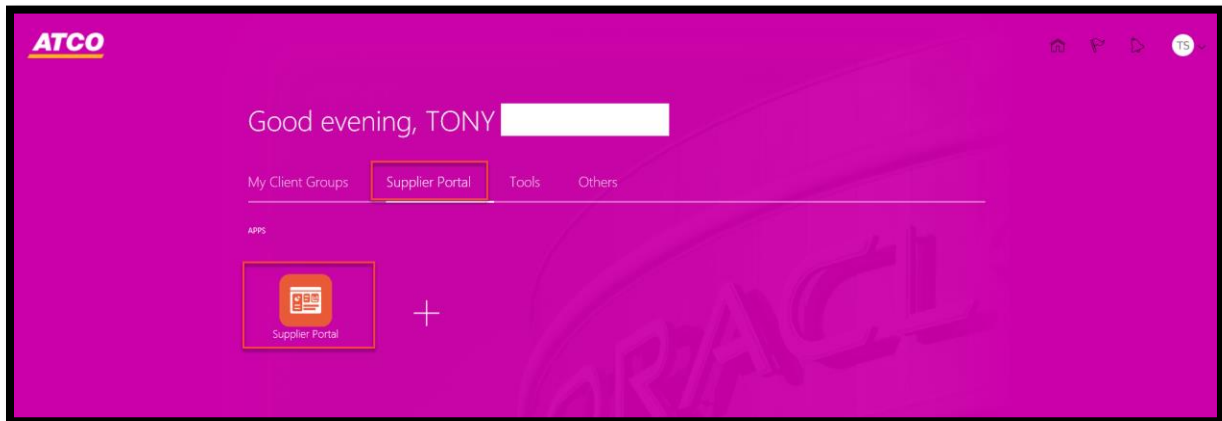
## Oracle Sign On

### Introduction

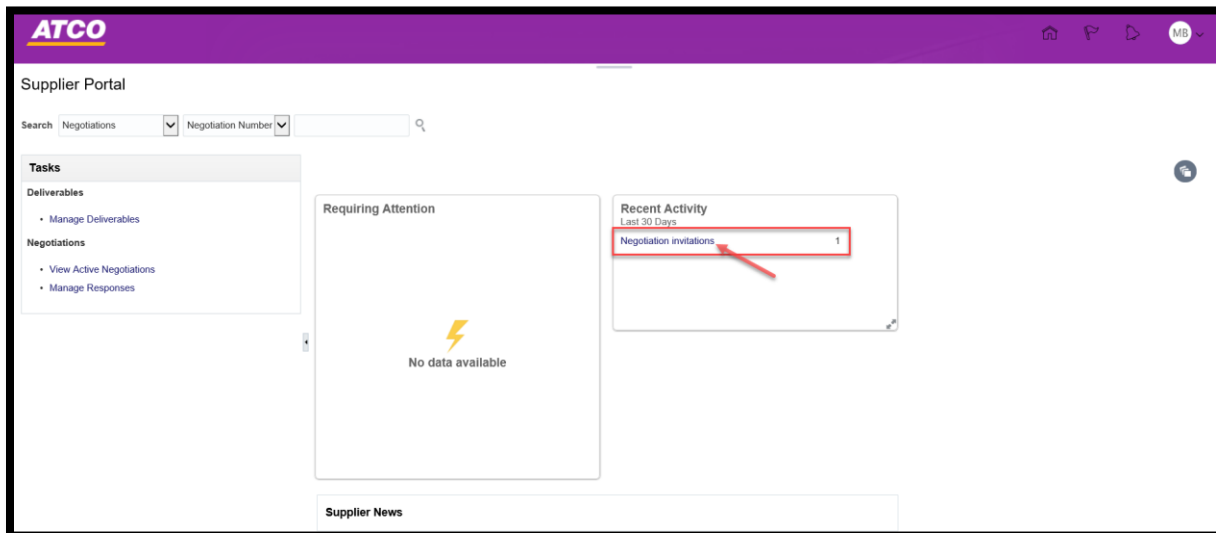
1. Once email and password have been provided, please open Oracle in Internet Browser and log in.



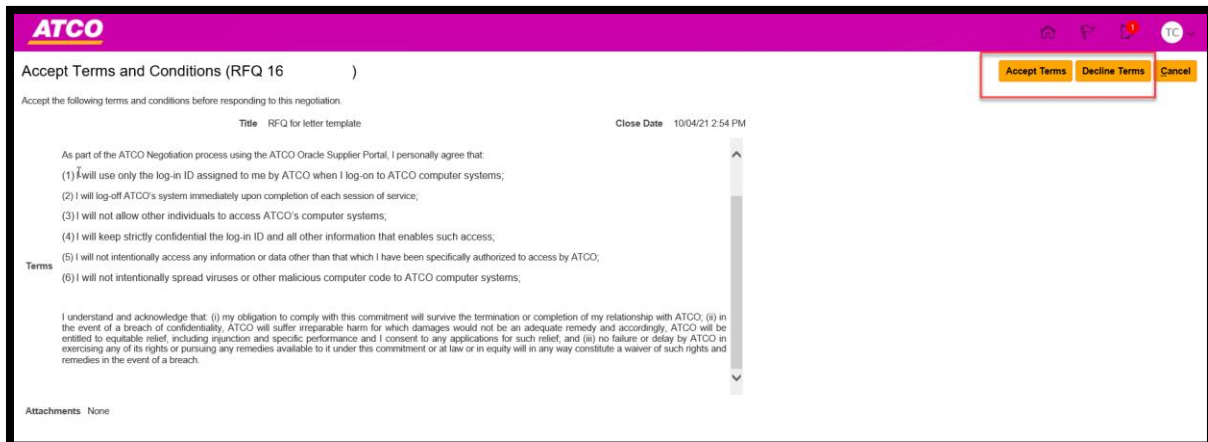
2. On the **Homepage**: Click on the **Supplier Portal** tab and click on the **Supplier Portal** icon.



3. On the dashboard in the **Recent Activity**, there will be a Negotiation invitation. Click on the hyperlink.

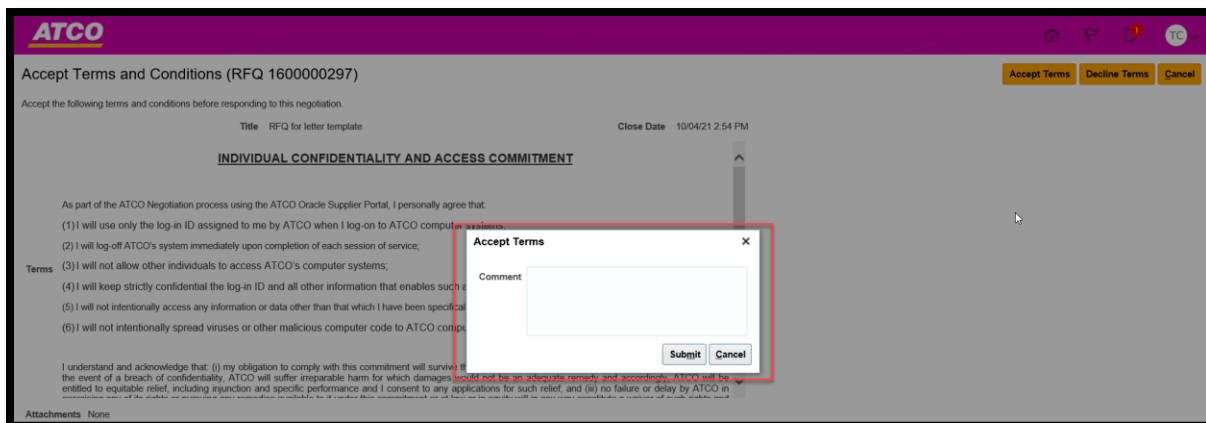


4. Accept Terms and Conditions by selecting **Accept Terms** or **Decline Terms**.

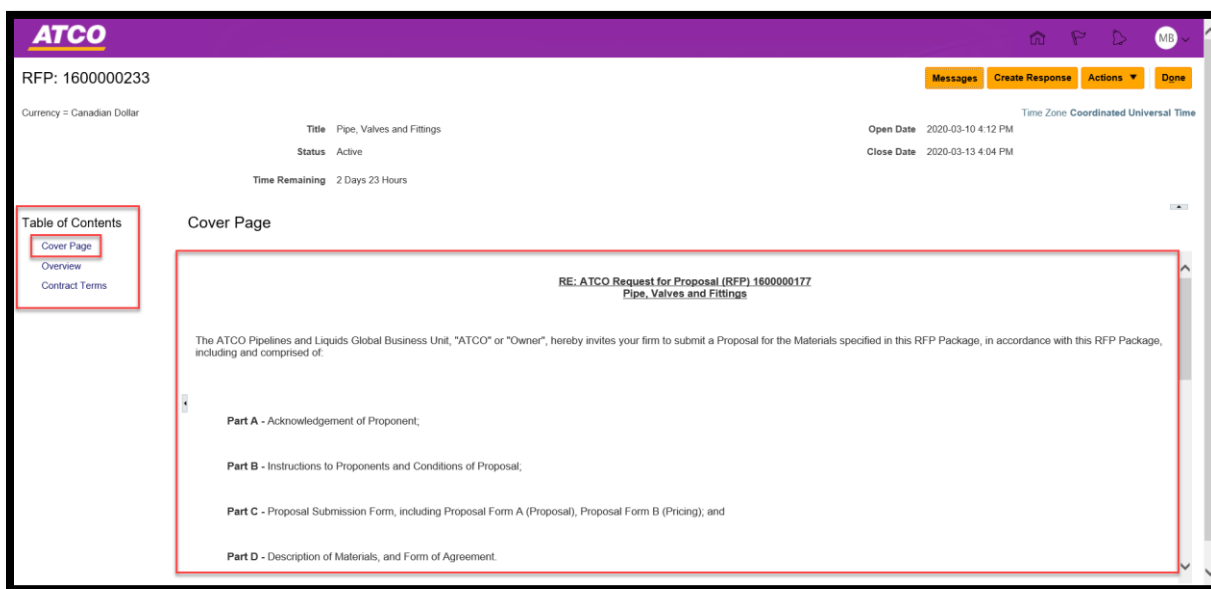


**Note:** If **Decline Terms** is selected, then process is complete.

5. If **Accept Terms** is selected. Add Comments and click **Submit**.



6. On the RFP screen, the screen is defaulted to the **Cover Page**, please review.



7. Under the **Table of Contents**, click on the **Overview** link to view the attachments.

The screenshot shows the ATCO RFP interface for RFP: 1600000233. The 'Table of Contents' on the left has 'Overview' highlighted with a red box. The 'Overview' section on the right has 'Attachments Addendum 1.pdf (8 more...)' highlighted with a red box and a red arrow pointing to it.

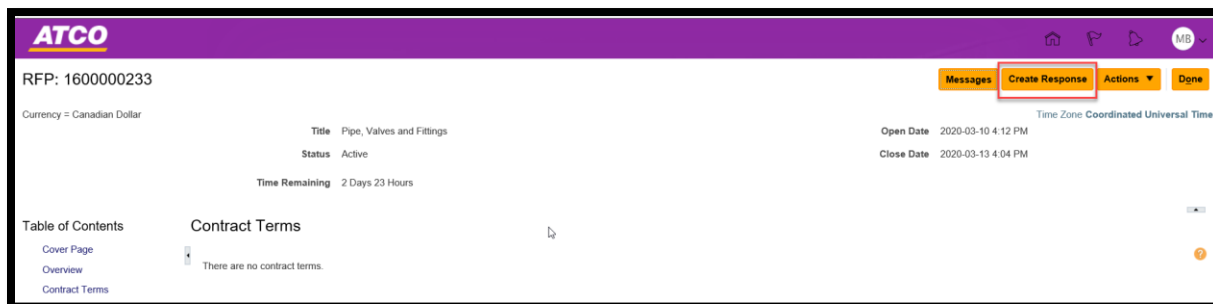
8. Select the attachments that are required to be reviewed and click **OK**.

The screenshot shows the 'Attachments' modal window in the ATCO RFP interface. The modal contains a table with the following data:

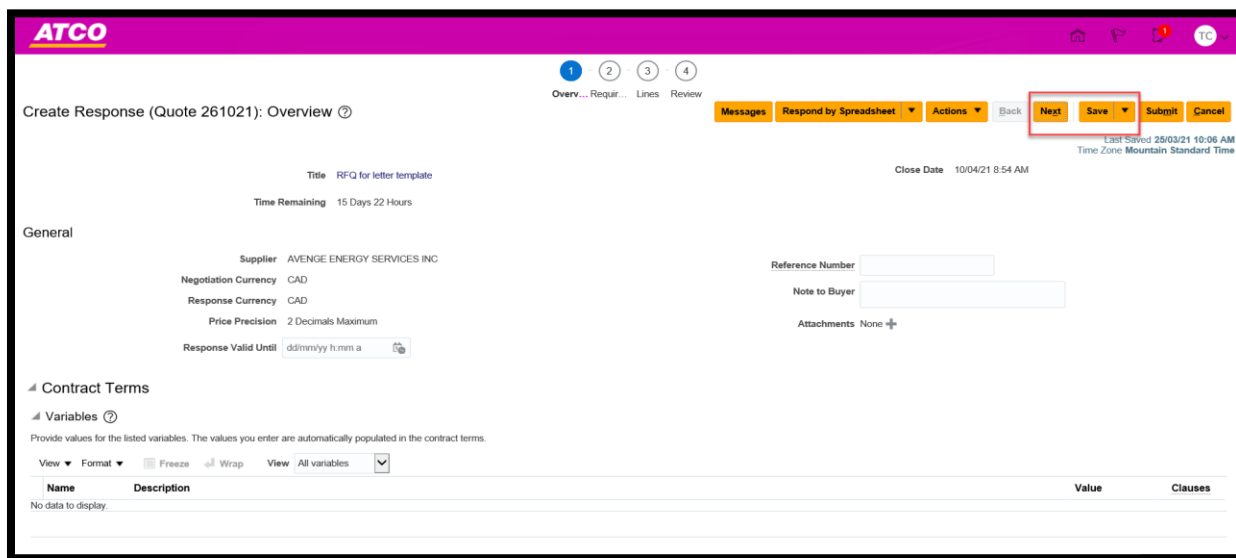
Type	* File Name or URL	Title	Description	Attached By	Attached Da
File	Addendum 1.pdf	Addendum 1.pdf		Nguyen-Wong...	2020-03-10 3:
File	01. RFP Part A - Acknowledgement Form.docx	01. RFP Part A - Acknowl...		Nguyen-Wong...	2020-03-10 3:
File	02. RFP Part B - Instructions to Proponents.pdf	02. RFP Part B - Instructi...		Nguyen-Wong...	2020-03-10 3:
File	03. RFP Part C - Proposal Submission Form.docx	03. RFP Part C - Proposa...		Nguyen-Wong...	2020-03-10 3:
File	RFP Form A (Proposal).xlsx	RFP Form A (Proposal).xlsx		Nguyen-Wong...	2020-03-10 3:
File	RFP Form B (Pricing).xlsx	RFP Form B (Pricing).xlsx		Nguyen-Wong...	2020-03-10 3:
File	04. RFP Part D - Description of Services, Project and...	04. RFP Part D - Descript...		Nguyen-Wong...	2020-03-10 3:
File	Annex 1 - Form of Agreement.pdf	Annex 1 - Form of Agree...		Nguyen-Wong...	2020-03-10 3:
File	Addendum 2.pdf	Addendum 2.pdf		Nguyen-Wong...	2020-03-10 3:

The 'OK' button at the bottom right of the modal is highlighted with a red box.

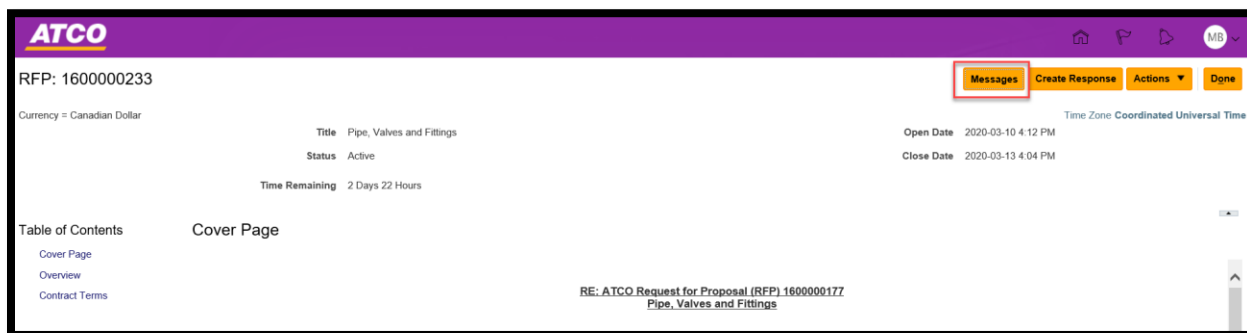
9. Click on **Create Response** to Accept Terms and Conditions.



10. On the **Create Response** page, add attachments and 'Note to Buyer' if required. Click **Save**. Click **Next**.

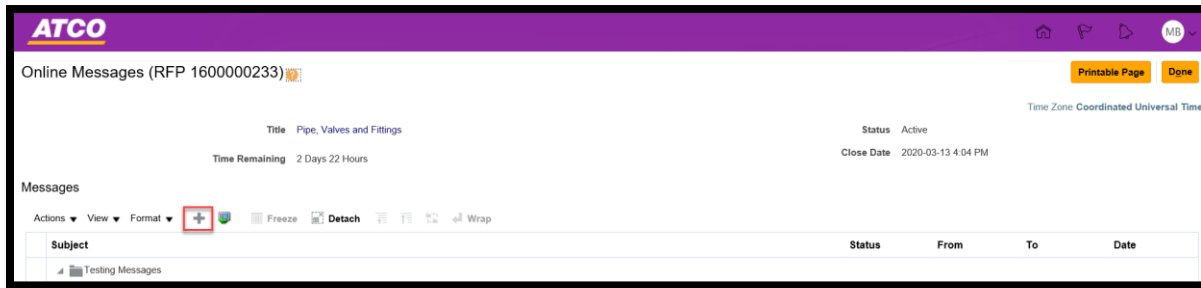


11. To send a message, click on the **Message** button.

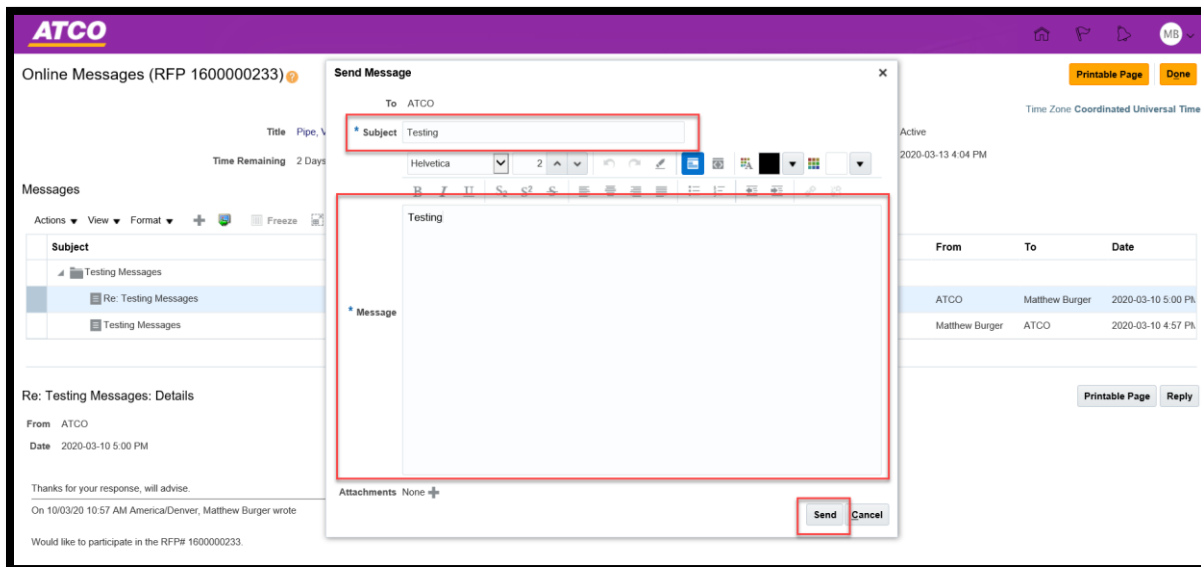




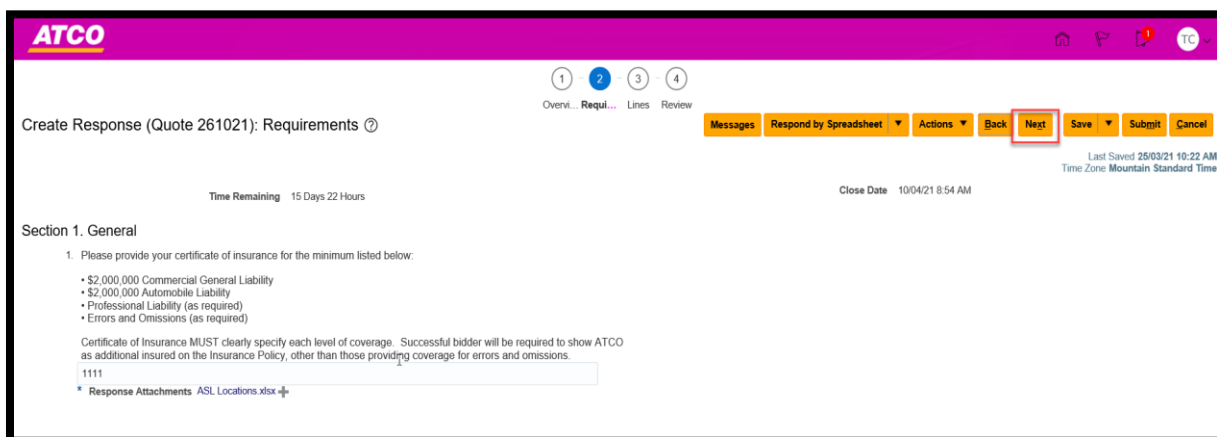
12. Click '+' button.



13. On the **Send Message** pop-up screen, enter the 'Subject' and 'Message' and click **Send**.



14. Review the **Requirements** screen. Click **Next**.



15. On the **Lines** page, enter the **Response Price**. Click **Save**. Click **Next**.

ATCO

Create Response (Quote 261021): Lines

Currency = Canadian Dollar

Time Remaining 15 Days 22 Hours

Close Date 10/04/21 8:54 AM

Line	Description	Alternate Line Description	Create Alternate	Required Details	Category Name	Start Price	Response Price	Estimated Quantity	UOM	Line Amount	Estimated Total Amount	Response Minimum Release Amount
1	BOLT, MACHINE, 3/4" X 12", GALV C		+		Industrial Parts and		<input type="text"/>	1,000	EA			
2	Testing		+		Other Other Other		<input type="text"/>	1,000	EA			

Rows Selected 1 Columns Hidden 5

Grand Totals

All response lines except alternate lines are included.

Response Amount 0.00

16. Review and click **Submit**.

ATCO

Review Response: Quote 261021

Currency = Canadian Dollar

Title RFQ for letter template

Close Date 10/04/21 8:54 AM

Time Remaining 15 Days 22 Hours

Overview Requirements Lines

General

Supplier AVENGE ENERGY SERVICES INC

Reference Number

Negotiation Currency CAD

Note to Buyer

Response Currency CAD

Price Precision 2 Decimals Maximum

Attachments None

Response Valid Until

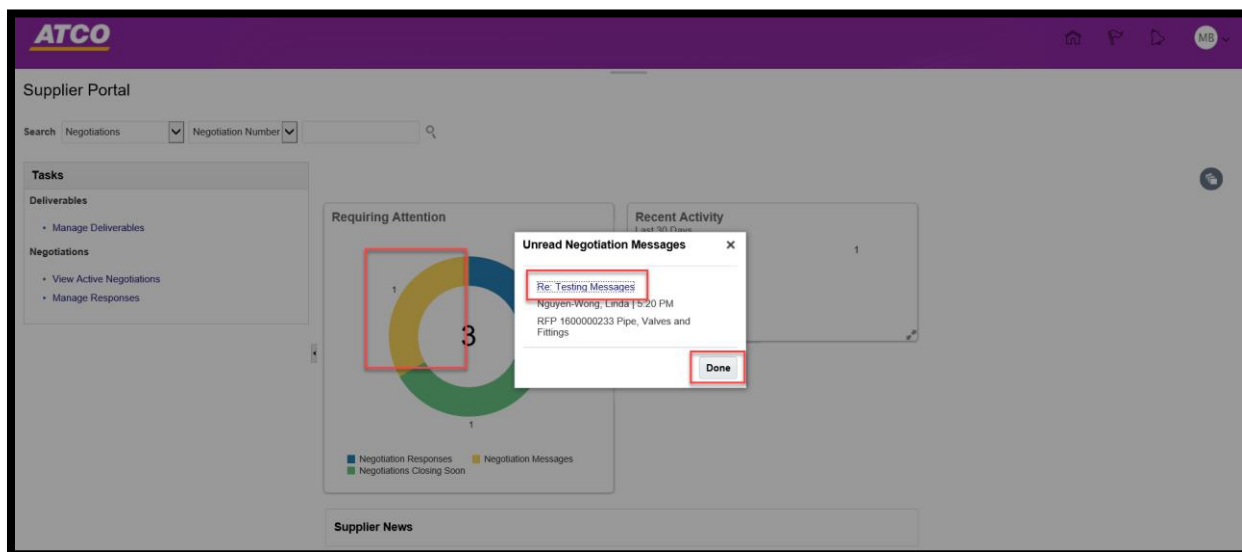
Contract Terms

Variables

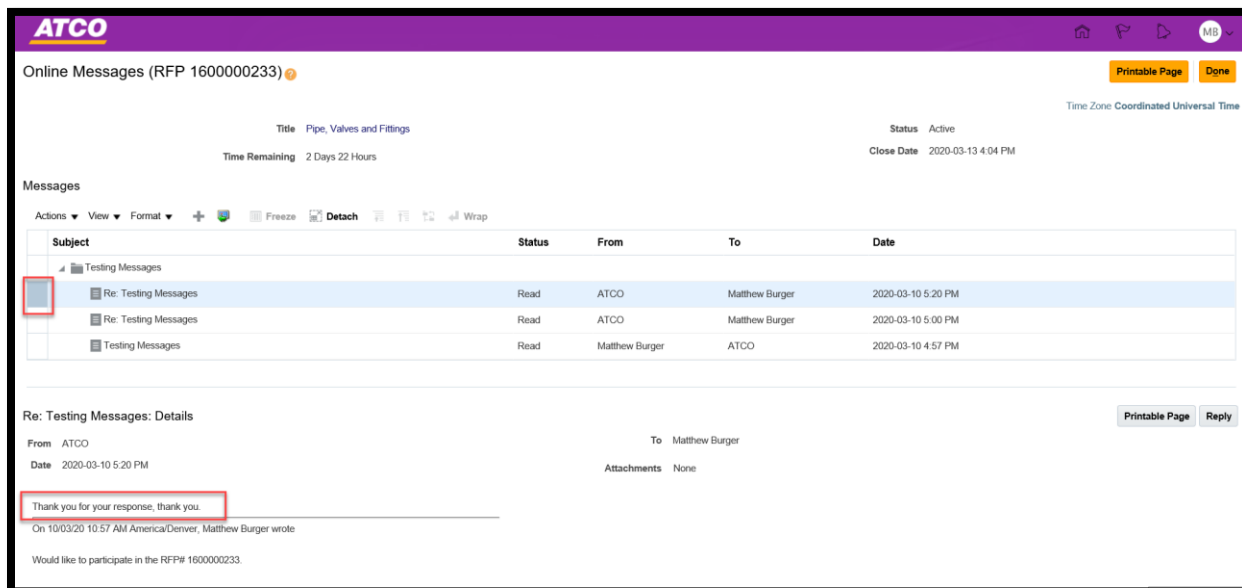
Provide values for the listed variables. The values you enter are automatically populated in the contract terms.

Name	Description	Value	Clauses

17. To view **Message** response, click on the graph and click on the hyperlink on the main dashboard.



18. On the **Online Messages** screen, the message will be visible.



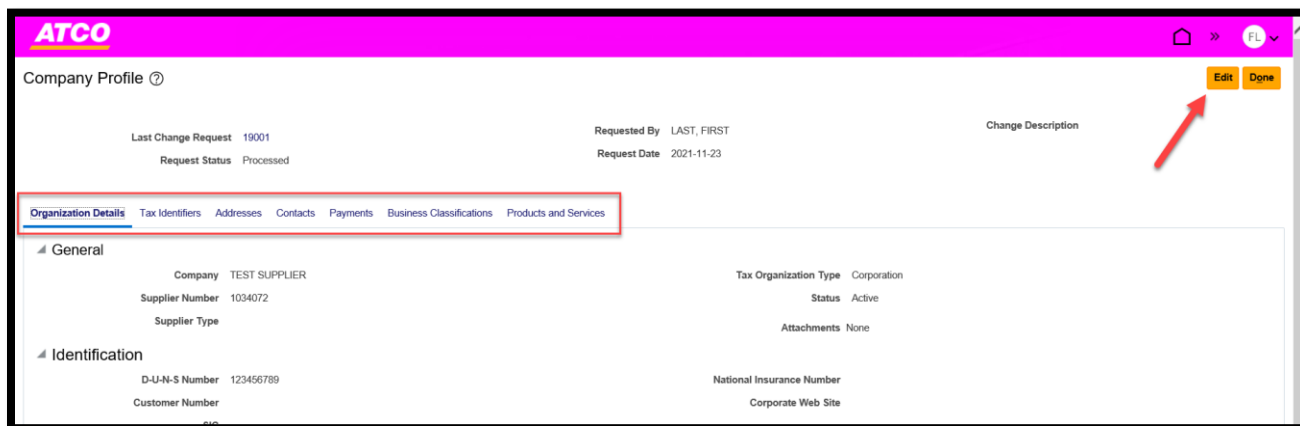
## Manage Profile


### Update supplier information as required (Name, Email, Address or Phone number)

1. Log into Oracle, and **Supplier Portal** dashboard will be visible. Scroll down to *Company Profile* and select **Manage Profile**.



2. On the **Company Profile** page, you will see multiple tabs. Click **Edit**.



3. Click on **Contacts** tab, highlight the contact that needs to be updated. Click on the  or click on **Actions > Edit**.

ATCO

Edit Profile Change Request: 29001

Change Description

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

Actions View Format + Status Active Freeze Detach Wrap

Create Edit Delete

Job Title	Email	Phone	Administrative Contact	User Account	Status
	FIRST_LAST@TEST.COM	+1 (780) 123-4567			Active

4. Make the necessary changes on the **Edit Contact** page and click **Ok**.

ATCO

Edit Profile Change Request: 29001

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

Actions View Format + Status Active Freeze Detach Wrap

Name

LAST, FIRST

Columns Hidden: 7

Salutation

\* First Name FIRST

Middle Name

\* Last Name LAST

Job Title

Administrative contact

Phone 1 780 1234567

Mobile

Fax

Email FIRST\_LAST@TEST.COM

Status Active

Contact Addresses

Address Name Address Phone Address Purpose Status

No data to display.

Columns Hidden: 5

User Account

Account Status Active

User Name FIRST\_LAST@TEST.COM

Roles Data Access

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include...

OK Cancel

5. Enter the **Change Description**, click **Save** and then click **Review Changes**.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATED LAST NAME

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

Actions View Format + Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
LAST-NAME, FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567			Active

Columns Hidden 7

6. Review the changes and click **Submit**.

ATCO

Review Changes

Change Description: UPDATED LAST NAME

Contacts

View Format Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
LAST-NAME, FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567			Active	

Columns Hidden 7



**Note:** If change order is no longer required, click **Delete Change Request** on step 5 beside **Review Changes**.



**Additional Information:** All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.

## Add New Contact



1. On the **Edit Profile Change Request** click on the '+' icon and enter the mandatory fields and click **Ok**.

2. Enter **Change Description**, click **Save** and click on **Review Changes**.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
CONTACT_NEW		NEW.CONTACT@TEST.COM	+1 (780) 765-4321			Active
LAST-NAME, FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567			Active

3. On the **Review Changes** page, click **Submit**.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
+ CONTACT_NEW		NEW.CONTACT@TEST.COM	+1 (780) 765-4321			Active	
• LAST-NAME, FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567			Active	

	<p><b>Note:</b> If change order is no longer required, click <b>Delete Change Request</b> on step 2 beside <b>Review Changes</b>.</p>
	<p><b>Additional Information:</b> All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.</p>



## Update or Add new supplier site address

1. On the **Edit Profile Change Request** screen, click on the **Addresses** tab.



**Note:** If there are multiple site addresses, highlight the line that needs to be updated.

2. On the **Edit Address** screen, update the information and click **OK**.

3. Enter **Change Description**, click **Save** and click on **Review Changes**.

4. On the **Review Changes** screen, click **Submit**.



Review Changes

Change Description: ADD OR UPDATE SUPPLIER SITE ADDRESS

4 Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
EDMONTON1	12345 321 STREET, EDMONTON AB T5J 2V6, CANADA		Ordering, Remit to, RFQ or Bidding		Active	

Columns Hidden: 3



**Note:** If change order is no longer required, click **Delete Change Request** on step 3 beside **Review Changes**.



**Additional Information:** All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.

## Update or Add new Payment Methods

1. On the **Edit Profile Change Request** screen, click on the **Payments** tab and select the **Payment Methods** sub tab.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE OR ADD NEWPAYMENT METHODS

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

**Payment Methods** Bank Accounts

Actions View Format Freeze Detach Wrap

Default	Payment Method	From Date	To Date
<input checked="" type="checkbox"/>	Electronic	2008-10-02	yyyy-mm-dd
<input type="checkbox"/>	ACH	2008-02-10	yyyy-mm-dd
<input type="checkbox"/>	Check	2008-10-02	yyyy-mm-dd
<input type="checkbox"/>	VirtualPay	2021-01-01	yyyy-mm-dd
<input type="checkbox"/>	Wire	2008-10-02	yyyy-mm-dd

Delete Change Request Review Changes Save Save and Close Cancel

2. Click on **Actions** and select **Set Default**. Add comments in the **Change Description** and click **Save**. Click **Review Changes** button.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE OR ADD NEWPAYMENT METHODS

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

**Payment Methods** Bank Accounts

Actions View Format Freeze Detach Wrap

- Add Row
- Remove
- Set Default**

Payment Method	From Date	To Date
Electronic	2008-10-02	yyyy-mm-dd
ACH	2008-02-10	yyyy-mm-dd
Check	2008-10-02	yyyy-mm-dd
VirtualPay	2021-01-01	yyyy-mm-dd
Wire	2008-10-02	yyyy-mm-dd

Delete Change Request Review Changes Save Save and Close Cancel

- 3.

## Update or Add new bank account

- On the **Edit Profile Change Request** screen, click on the **Payments** tab and select the **Bank Accounts** sub tab.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE OR ADD NEW BANK ACCOUNT

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

Payment Methods **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXX5678			BANK OF MONTREAL

Columns Hidden: 8

- Click on the '+' or to add or edit the existing banking information. Once the information has been updated, click on **OK**.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE BANK ACCOUNT

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

Payment Methods **Bank Accounts**

**Edit Bank Account XXXX5678**

Enter account number or IBAN unless account number is marked as required

\* Country: Canada

\* Account Number: XXXX5678

Bank Name: BANK OF MONTREAL

Bank Branch: 00022

Allow international payments

Additional Information

Account Name: \_\_\_\_\_

Alternate Account Name: \_\_\_\_\_

Account Suffix: \_\_\_\_\_

From Date: 2021-11-23

Inactive On: yyyy-mm-dd

IBAN: \_\_\_\_\_

Currency: \_\_\_\_\_

Check Digits: \_\_\_\_\_

Account Type: \_\_\_\_\_

Description: \_\_\_\_\_

OK Cancel

- Enter **Change Description**, click **Save** and click on **Review Changes**.

**ATCO**

Edit Profile Change Request: 29001

Change Description: UPDATE OR ADD NEW BANK ACCOUNT

Buttons: Delete Change Request, Review Changes, Save, Save and Close, Cancel

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

Section: Payment Methods, Bank Accounts

Actions: View, Format, Freeze, Wrap

Primary	Account Number	IBAN	Currency	Bank Name
✓	30005678			BANK OF MONTREAL

Columns Hidden: 8

7. On the **review Changes** page, click **Submit**.

**ATCO**

Review Changes

Change Description: UPDATE OR ADD NEW BANK ACCOUNT

Buttons: Edit, Submit, Cancel

Section: Contacts

Actions: View, Format, Freeze, Detach, Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
CONTACT, NEW		NEW.CONTACT@TEST.COM	+1 (780) 765-4321			Active	
LAST-NAME, FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567		✓	Active	

Columns Hidden: 7



**Note:** If change order is no longer required, click **Delete Change Request** on step 3 beside **Review Changes**.



**Additional Information:** All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.

## Update Organization Details, Tax Organization Type or Supplier Type

1. On the **Company Profile** and click on the **Organization Details**. Click the **Edit** button.

The screenshot shows the ATCO Company Profile page. The 'Organization Details' tab is selected and highlighted with a red box. The 'Edit' button is also highlighted with a red box. The page displays the following information:

- Company Profile ②
- There are profile changes that are not submitted. You must edit the changes to continue.
- Last Change Request: 29001
- Request Status: Draft
- Requested By: LAST, FIRST
- Request Date: 2021-11-25
- Change Description: ADD OR UPDATE SUPPLIER SITE ADDRESS
- Buttons: Delete Change Request, Edit, Done
- Tabs: Organization Details (selected), Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, Products and Services
- General section:
  - Company: TEST SUPPLIER
  - Supplier Number: 1034072
  - Supplier Type: [dropdown]
  - Tax Organization Type: Corporation
  - Status: Active
  - Attachments: None

2. Update the information as required and enter comments in the **Change Description**. Click **Save**, and then click **Review Changes**.

The screenshot shows the ATCO Edit Profile Change Request page for request 29001. The 'Review Changes' button is highlighted with a red box. The 'Change Description' field contains the text 'UPDATE SUPPLIER NAME'. The 'Supplier Name' field is also highlighted with a red box. The page displays the following information:

- Edit Profile Change Request: 29001
- Buttons: Delete Change Request, Review Changes (highlighted), Save, Save and Close, Cancel
- Tabs: Organization Details (selected), Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, Products and Services
- General section:
  - Supplier Name: TEST SUPPLIER (highlighted)
  - Supplier Number: 1034072
  - Supplier Type: [dropdown]
  - Tax Organization Type: Corporation
  - Status: Active
  - Attachments: None
- Identification section:
  - D-U-N-S Number: 123456789
  - National Insurance Number: [input field]

3. On the **Review Changes** screen, click **Submit**.

Review Changes

Change Description UPDATE SUPPLIER NAME

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
EDMONTON1	12345 321 STREET, EDMONTON AB T5J 2V6, CANADA		Ordering, Remit to, RFQ or Bidding		Active	



**Note:** If change order is no longer required, click **Delete Change Request** on step 2 beside **Review Changes**.



**Additional Information:** All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.

## How to Lookup Your Oracle ID Supplier Number

- On the **Company Profile** and click on the **Manage Profile** tab.

Supplier Portal

Search  Order Number

**Tasks**

- Orders
  - Manage Orders
  - Manage Schedules
  - Acknowledge Schedules in Spreadsheet
- Agreements
  - Manage Agreements
- Channel Programs
  - Manage Programs
- Shipments
  - Manage Shipments
  - Create ASN
  - Create ASBN
  - Upload ASN or ASBN
  - View Receipts
  - View Returns
- Contracts and Deliverables
  - Manage Contracts
  - Manage Deliverables
- Negotiations
  - View Active Negotiations
  - Manage Responses
- Qualifications
  - Manage Questionnaires
  - View Qualifications
- Company Profile**
  - Manage Profile**

- On the Organizational Details tab look under Supplier Number

Company Profile [🔗](#)

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications

General

\* Company REXEL UTILITY  
 Supplier Number 1026681  
 \* Supplier Type SUPPLIER

\* Tax Organization Type Corporation  
 Status Active  
 Attachments LINKED ALL CON to MISSISSAUGA2 today. Also added RFO or Bidding purpose to the (8 more...)

Identification

D-U-N-S Number  
 Customer Number  
 SIC  
 Corporate Web Site

Corporate Profile

\* Year Established  
 Mission Statement  
 \* Year Incorporated

6. This is your Oracle Supplier Number

## Update Business Classifications/Products & Services category

1. On the **Company Profile** screen, click on **Business Classifications**. Click the **Edit** button.

ATCO

Company Profile [🔗](#)

There are profile changes that are not submitted. You must edit the changes to continue.

Last Change Request 29001 Requested By LAST, FIRST Change Description UPDATE SUPPLIER NAME  
 Request Status Draft Request Date 2021-11-25

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

None of the classifications are applicable

View Format Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On
No data to display											

2. On the **Edit Profile Change Request** screen, click **Actions** and select **Add** or the '+' icon.

ATCO

Edit Profile Change Request: 29001

Delete Change Request Review Changes Save Save and Close Cancel

Change Description UPDATE BUSINESS CLASSIFICATIONS/PRODUCTS & SERVICES CATEGORY

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
No data to display											

3. Enter the information that is required and add comments in the **Change Description**. Click **Save** and then click on **review Changes**.



ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE BUSINESS CLASSIFICATIONS/PRODUCTS & SERVICES CATEGORY

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
WCB		Future Dated	Other		1234	2021-11-30	yyyy-mm-dd	None			

Buttons: Delete Change Request, Review Changes, Save, Save and Close, Cancel

4. On the **Confirm Business Classification Updates** pop-up, click **Confirm**. Click **Review Changes** button.

ATCO

Edit Profile Change Request: 29001

Change Description: UPDATE BUSINESS CLASSIFICATIONS/PRODUCTS & SERVICES CATEGORY

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

None of the classifications are applicable

Actions View Format Freeze Detach Wrap

**Confirm Business Classification Updates**

I confirm the accuracy of the new or updated business classifications.

Buttons: Confirm, Cancel

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On
WCB		Future Dated	Other	ABC123	1234	2021-11-30	yyyy-mm-dd	None			

Buttons: Delete Change Request, Review Changes, Save, Save and Close, Cancel

5. On the **Review Changes** screen, click **Submit**.

ATCO

Review Changes

Change Description: UPDATE BUSINESS CLASSIFICATIONS/PRODUCTS & SERVICES CATEGORY

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
EDMONTON1	12345 321 STREET, EDMONTON AB T5J 2V6, CANADA		Ordering, Remit to, RFQ or Bidding		Active	

Columns Hidden 3

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
CONTACT_NEW		NEW.CONTACT@TEST.COM	+1 (780) 765-4321			Active	
LAST-NAME_FIRST		FIRST.LAST@TEST.COM	+1 (780) 123-4567			Active	

Columns Hidden 7

Business Classifications

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On	Details
WCB		Future Dated	Other	ABC123	1234	2021-11-30		None		FIRST LAST	2021-11-25	

Buttons: Edit, Submit, Cancel



**Note:** If change order is no longer required, click **Delete Change Request** on step 4 beside **Review Changes**.

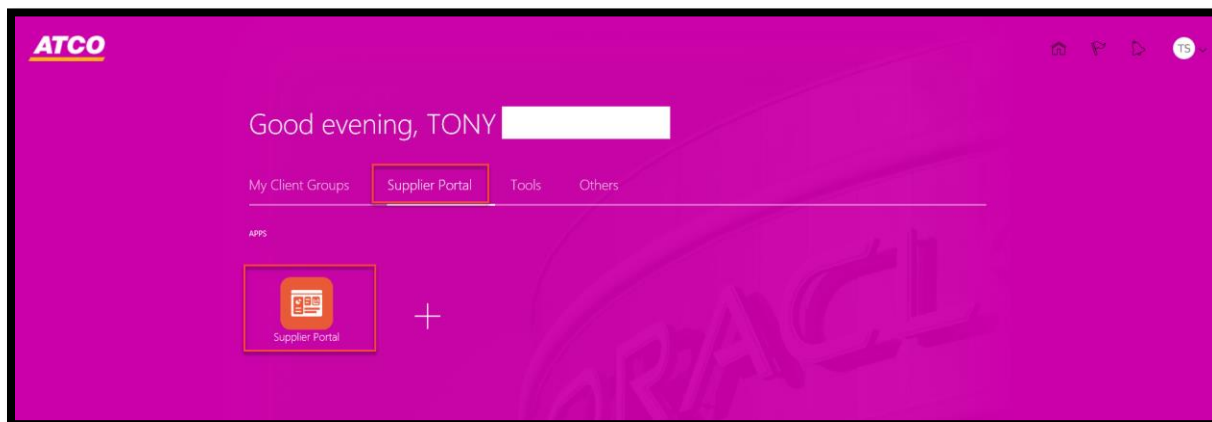


**Additional Information:** All changes submitted will need to be reviewed and fully approved by ATCO. Once approved, the changes will be completed in the Supplier Portal.

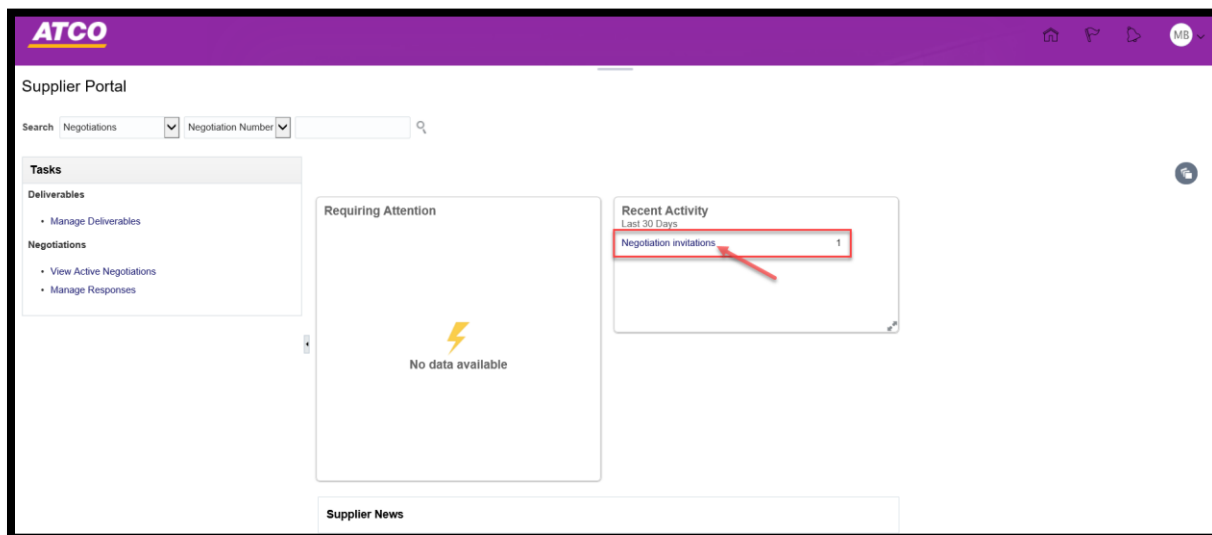
## Respond to Negotiations

### Accept Terms & Conditions

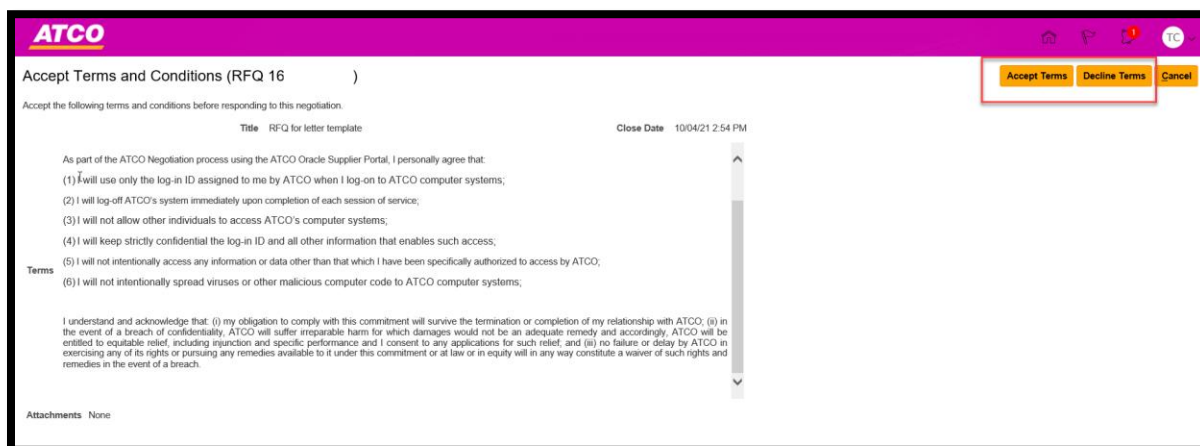
1. On the **Homepage**: Click on the **Supplier Portal** tab and click on the **Supplier Portal** icon.



2. On the dashboard in the **Recent Activity**, there will be a Negotiation invitation. Click on the hyperlink.

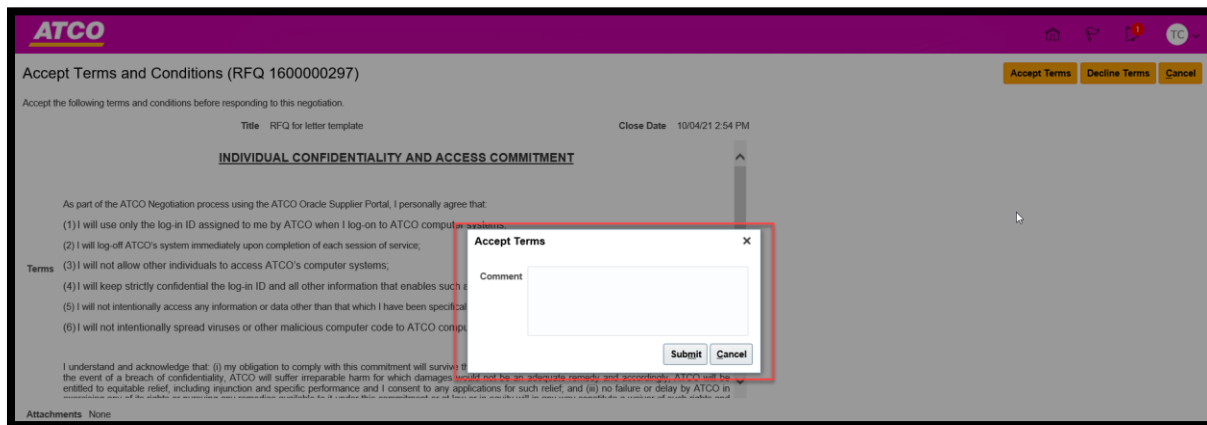


3. Accept Terms and Conditions by selecting **Accept Terms** or **Decline Terms**.

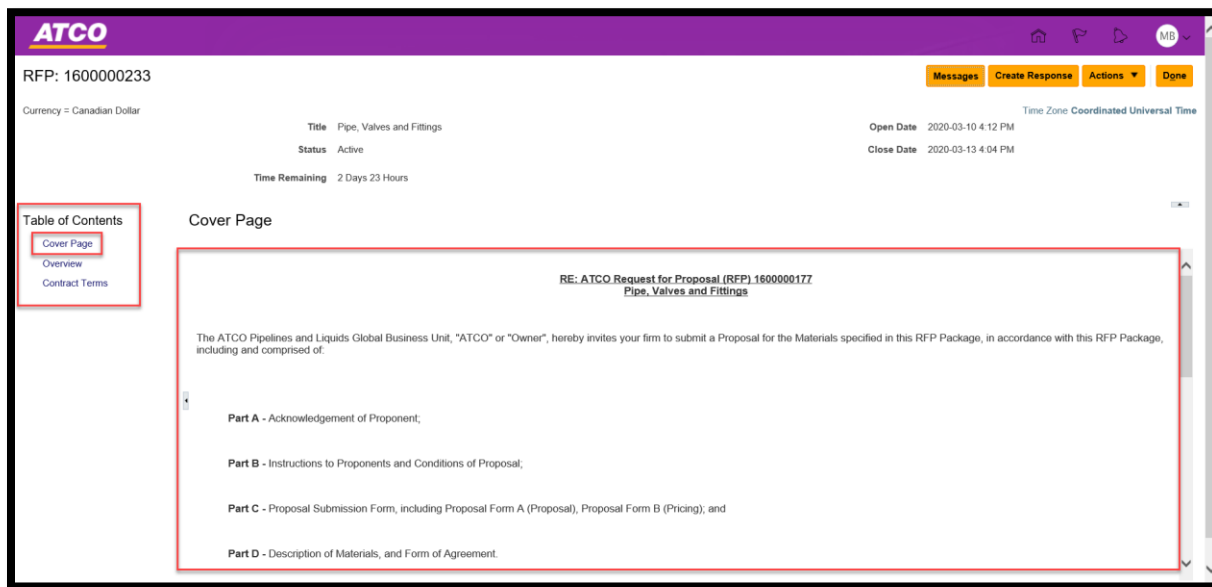


**Note:** If **Decline Terms** is selected, then process is complete.

4. If **Accept Terms** is selected. Add Comments and click **Submit**.



5. On the RFP screen, the screen is defaulted to the **Cover Page**, please review.



6. Under the **Table of Contents**, click on the **Overview** link to view the attachments.

The screenshot shows the ATCO RFP interface for RFP: 1600000233. The 'Table of Contents' sidebar on the left has 'Overview' highlighted with a red box. The main content area shows the 'Overview' section with 'Attachments Addendum 1.pdf (8 more...)' highlighted with a red box and a red arrow pointing to it.

7. Select the attachments that are required to be reviewed and click **OK**.

The screenshot shows the 'Attachments' modal window in the ATCO RFP interface. The modal contains a table with the following data:

Type	* File Name or URL	Title	Description	Attached By	Attached Date
File	Addendum 1.pdf	Addendum 1.pdf		Nguyen-Wong...	2020-03-10 3:12 PM
File	01. RFP Part A - Acknowledgement Form.docx	01. RFP Part A - Acknowl...		Nguyen-Wong...	2020-03-10 3:12 PM
File	02. RFP Part B - Instructions to Proponents.pdf	02. RFP Part B - Instructi...		Nguyen-Wong...	2020-03-10 3:12 PM
File	03. RFP Part C - Proposal Submission Form.docx	03. RFP Part C - Proposa...		Nguyen-Wong...	2020-03-10 3:12 PM
File	RFP Form A (Proposal).xlsx	RFP Form A (Proposal).xlsx		Nguyen-Wong...	2020-03-10 3:12 PM
File	RFP Form B (Pricing).xlsx	RFP Form B (Pricing).xlsx		Nguyen-Wong...	2020-03-10 3:12 PM
File	04. RFP Part D - Description of Services, Project and...	04. RFP Part D - Descript...		Nguyen-Wong...	2020-03-10 3:12 PM
File	Annex 1 - Form of Agreement.pdf	Annex 1 - Form of Agree...		Nguyen-Wong...	2020-03-10 3:12 PM
File	Addendum 2.pdf	Addendum 2.pdf		Nguyen-Wong...	2020-03-10 3:12 PM

The 'OK' button at the bottom right of the modal is highlighted with a red box.

8. Click on **Create Response** to Accept Terms and Conditions.

The screenshot shows the ATCO RFP interface for RFP: 160000233. The 'Create Response' button is highlighted with a red box. The interface includes a navigation bar with 'Messages', 'Create Response', 'Actions', and 'Done'. Below the navigation bar, there are fields for 'Currency = Canadian Dollar', 'Title Pipe, Valves and Fittings', 'Status Active', 'Open Date 2020-03-10 4:12 PM', 'Close Date 2020-03-13 4:04 PM', and 'Time Remaining 2 Days 23 Hours'. A 'Table of Contents' section is visible on the left, and the main content area shows 'Contract Terms' with a message: 'There are no contract terms.'

9. On the **Create Response** page, add attachments and 'Note to Buyer' if required. Click **Save**. Click **Next**.

The screenshot shows the 'Create Response (Quote 261021): Overview' page. The 'Next' and 'Save' buttons are highlighted with red boxes. The interface includes a navigation bar with 'Messages', 'Respond by Spreadsheet', 'Actions', 'Back', 'Next', 'Save', 'Submit', and 'Cancel'. Below the navigation bar, there are fields for 'Title RFQ for letter template', 'Close Date 10/04/21 8:54 AM', and 'Time Remaining 15 Days 22 Hours'. The 'General' section includes fields for 'Supplier AVENGE ENERGY SERVICES INC', 'Negotiation Currency CAD', 'Response Currency CAD', 'Price Precision 2 Decimals Maximum', and 'Response Valid Until'. The 'Contract Terms' section is expanded, and the 'Variables' section is also visible. The 'Note to Buyer' and 'Attachments' fields are present.

## Negotiation Messages

10. To send a message, click on the **Message** button.

RFP: 1600000233

Currency = Canadian Dollar

Title Pipe, Valves and Fittings

Status Active

Time Remaining 2 Days 22 Hours

Open Date 2020-03-10 4:12 PM

Close Date 2020-03-13 4:04 PM

Time Zone Coordinated Universal Time

Table of Contents

Cover Page

RE: ATCO Request for Proposal (RFP) 1600000177  
Pipe, Valves and Fittings

11. Click '+' button.

Online Messages (RFP 1600000233)

Title Pipe, Valves and Fittings

Status Active

Time Remaining 2 Days 22 Hours

Close Date 2020-03-13 4:04 PM

Messages

Actions View Format + Freeze Detach Wrap

Subject	Status	From	To	Date
Testing Messages				

12. On the **Send Message** pop-up screen, enter the 'Subject' and 'Message' and click **Send**.

Online Messages (RFP 1600000233)

Title Pipe, V

Status Active

Time Remaining 2 Days

Close Date 2020-03-13 4:04 PM

Messages

Actions View Format + Freeze

Subject	Status	From	To	Date
Testing Messages				
Re: Testing Messages				
Testing Messages				

Re: Testing Messages: Details

From ATCO

Date 2020-03-10 5:00 PM

Thanks for your response, will advise.

On 10/03/20 10:57 AM America/Denver, Matthew Burger wrote

Would like to participate in the RFP# 1600000233.

Send Message

To ATCO

\* Subject Testing

Helvetica

2

Testing

\* Message

Attachments None

Send Cancel

From	To	Date
ATCO	Matthew Burger	2020-03-10 5:00 PM
Matthew Burger	ATCO	2020-03-10 4:57 PM

Printable Page Reply

13. Review the **Requirements** screen. Click **Next**.

**ATCO**

1 2 3 4  
Overvi... Requi... Lines Review

Create Response (Quote 261021): Requirements

Messages Respond by Spreadsheet Actions Back **Next** Save Submit Cancel

Last Saved 25/03/21 10:22 AM  
Time Zone Mountain Standard Time

Time Remaining 15 Days 22 Hours Close Date 10/04/21 8:54 AM

Section 1. General

1. Please provide your certificate of insurance for the minimum listed below:

- \$2,000,000 Commercial General Liability
- \$2,000,000 Automobile Liability
- Professional Liability (as required)
- Errors and Omissions (as required)

Certificate of Insurance MUST clearly specify each level of coverage. Successful bidder will be required to show ATCO as additional insured on the Insurance Policy, other than those providing coverage for errors and omissions.

1111

\* Response Attachments ASL Locations.xlsx

14. On the **Lines** page, enter the **Response Price**. Click **Save**. Click **Next**.

**ATCO**

1 2 3 4  
Overvi... Requi... Lines Review

Create Response (Quote 261021): Lines

Messages Respond by Spreadsheet Actions Back **Next** Save Submit Cancel

Last Saved 25/03/21 10:24 AM  
Time Zone Mountain Standard Time

Currency = Canadian Dollar Time Remaining 15 Days 22 Hours Close Date 10/04/21 8:54 AM

Line	Description	Alternate Line Description	Create Alternate	Required Details	Category Name	Start Price	Response Price	Estimated Quantity	UOM	Line Amount	Estimated Total Amount	Response Minimum Release Amount
1	BOLT, MACHINE, 3/4" X 12", GALV C		+		Industrial Parts and		<input type="text"/>	1,000	EA			
2	Testing		+		Other Other Other		<input type="text"/>	1,000	EA			

Rows Selected 1 Columns Hidden 5

Grand Totals  
All response lines except alternate lines are included.  
Response Amount 0.00

15. Review and click **Submit**.

**ATCO**

1 2 3 4  
Overvi... Requi... Lines Review

Review Response: Quote 261021

Messages Respond by Spreadsheet Actions Back Next Save **Submit** Cancel

Last Saved 25/03/21 10:26 AM  
Time Zone Mountain Standard Time

Currency = Canadian Dollar Title RFQ for letter template Close Date 10/04/21 8:54 AM

Time Remaining 15 Days 22 Hours

Overview Requirements Lines

General

Supplier AVENGE ENERGY SERVICES INC Reference Number  
Negotiation Currency CAD Note to Buyer  
Response Currency CAD Attachments: None  
Price Precision 2 Decimals Maximum  
Response Valid Until

Contract Terms

Variables

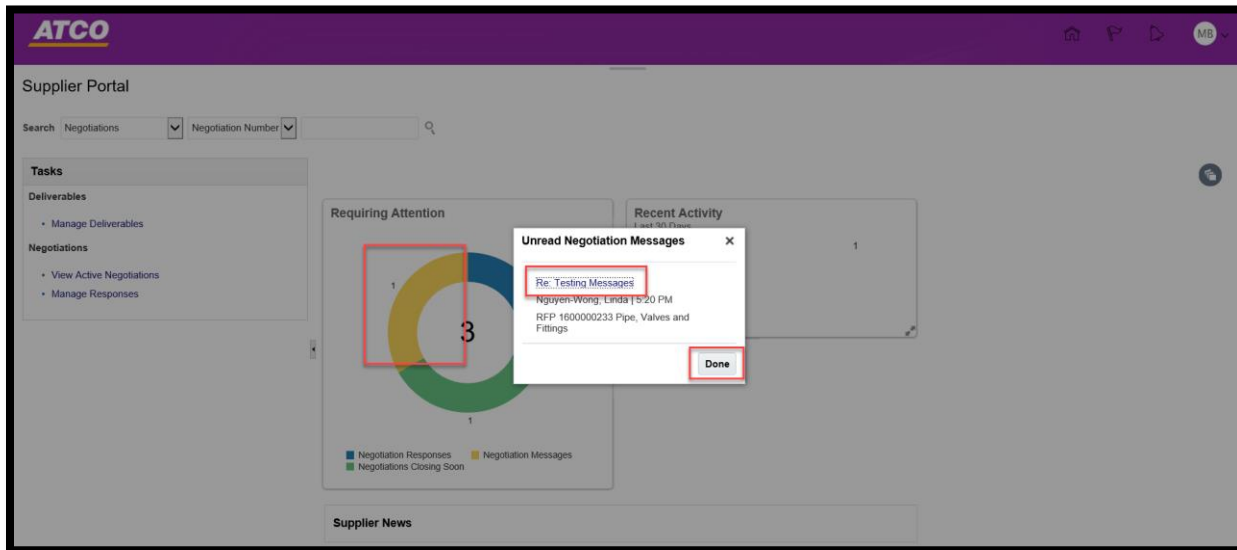
Provide values for the listed variables. The values you enter are automatically populated in the contract terms.

View Format Freeze Wrap View All variables

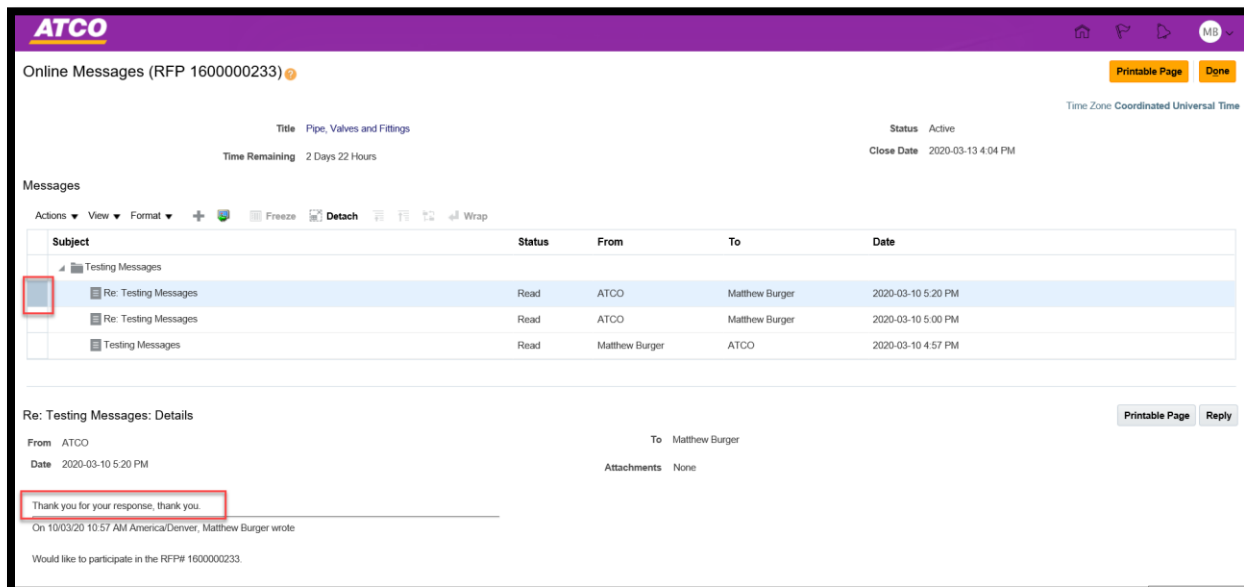
Name	Description	Value	Clauses



16. To view **Message** response, click on the graph and click on the hyperlink on the main dashboard.



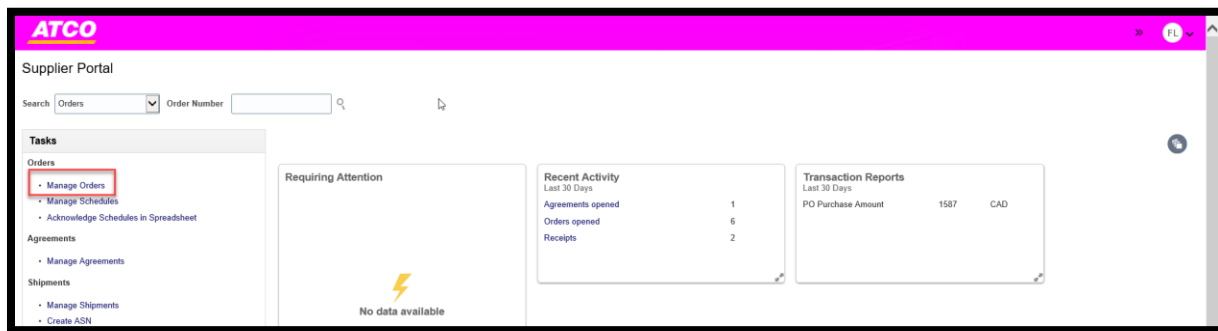
17. On the **Online Messages** screen, the message will be visible.



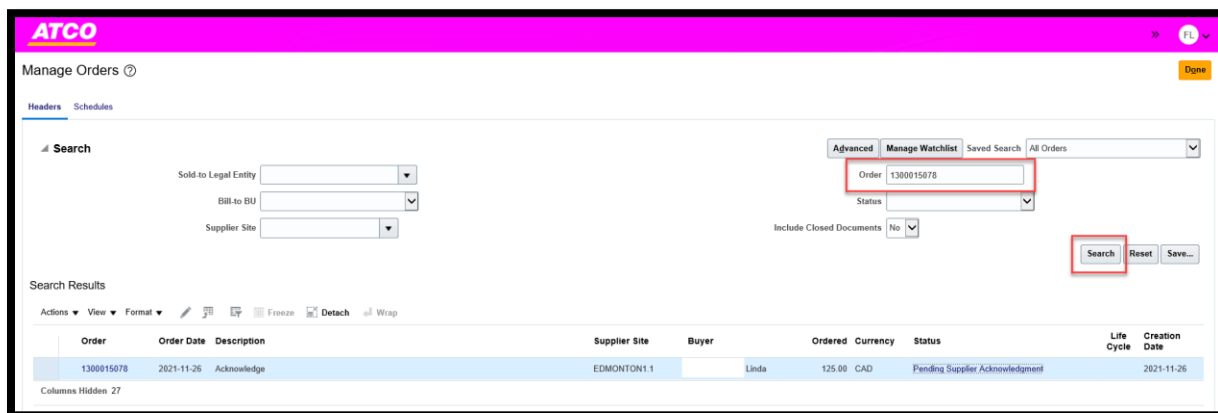
## Purchase Order

### Acknowledgment (Approve or Reject)

1. Login and navigate to **Supplier Portal** page and click on **Manage Order**.



2. In the **Order** field, enter the purchase order number and click **Search**.



3. In the **Search Result** and click on the purchase order hyperlink.

The screenshot shows the ATCO Manage Orders interface. The search criteria include Order 1300015078 and Status Pending Supplier Acknowledgment. The search results table is as follows:

Order	Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
1300015078	2021-11-26	Acknowledge	EDMONTON1.1	Linda	125.00	CAD	Pending Supplier Acknowledgment		2021-11-26

4. Highlight the line and click **Actions** and select **Acknowledge**.

The screenshot shows the ATCO Manage Orders interface with the 'Actions' menu open for the selected order line. The 'Acknowledge' option is highlighted. The search results table is as follows:

Order Date	Description	Supplier Site	Buyer	Ordered	Currency	Status	Life Cycle	Creation Date
2021-11-26	Acknowledge	EDMONTON1.1	Nguyen-Wong...	125.00	CAD	Pending Supplie...		2021-11-26

5. Enter **Acknowledgment Note** and click the **Accept** button.

ATCO Acknowledge Document (Purchase Order): 1300015078

Accept Reject View PDF Cancel

Main Contract Terms

General

Sold to Legal Entity	ATCO Electric - Distribution	Supplier	TEST SUPPLIER	Ordered	125.00 CAD
Order	1300015078	Supplier Site	EDMONTON11	Description	Acknowledge
Status	Pending Supplier Acknowledgment	Supplier Contact		Source Agreement	
Buyer	Nguyen-Wong, Linda	Bill to Location	ATCO Electric Ltd	Supplier Order	
Creation Date	2021-11-26	Ship to Location	Nisku Distribution Centre	Communication Method	None
				Master Contract	

Notes and Attachments

Required Acknowledgment	Document	Payment Terms	Net 30	<input type="checkbox"/>	Buyer managed transportation
Acknowledgment Due Date	2021-11-28	Shipping Method		<input type="checkbox"/>	Pay on receipt
Acknowledgment Note	Enter Notes	Freight Terms	INCOTERMS	<input type="checkbox"/>	Confirming order

Additional Information

Award Justification	Meets Procurement Guidelines	Work Order	
Transmission Direct Assign		Context Prompt	

Schedules

Actions View Format Freeze Detach Wrap

Friday, November 26, 2021

- If you click on the **Reject** button, you have the option to enter the notes in the **Rejection Notes**.

ATCO

Acknowledge Document (Purchase Order): 1300015078

Accept Reject View PDF Cancel

Main Contract Terms

General

Sold to Legal Entity ATCO Electric - Distribution Supplier TEST SUPPLIER Ordered 125.00 CAD  
 Order 1300015078 Supplier Site EDMONTON1.1 Description Acknowledge  
 Status Pending Supplier Acknowledgment Supplier Contact Source Agreement  
 Buyer Nguyen-Wong, Linda Bill to Location ATCO Electric Ltd Supplier Order  
 Creation Date 2021-11-26 Ship to Location Nisku Distribution Centre Communication Method None  
 Master Contract

Terms Notes and Attachments

Required Acknowledgment Document Payment Terms Net 30  
 Acknowledgment Due Date 2021-11-28 Shipping Method  
 Acknowledgment Note Enter Notes Freight Terms INCOTERMS

Additional Information

Award Justification Meets Procurement Guidelines Work Order  
 Transmission Direct Assign

Schedules

Actions View Format Freeze Detach Wrap

Line	Description	Supplier Item	Quantity	UOM	Price	Requested Delivery Date	Promised Delivery Date	Rejection Reason	Location
1	Acknowledgement TEST		5	EA	25.00				Nisku Distributio...

Rows Selected 1 Columns Hidden 11

7. On the **Warning** pop-up, click **OK**.

ATCO

Acknowledge Document (Purchase Order): 1300015078

Accept Reject View PDF Cancel

Main Contract Terms

General

Sold to Legal Entity ATCO Electric - Distribution Supplier TEST SUPPLIER Ordered 125.00 CAD  
 Order 1300015078 Supplier Site EDMONTON1.1 Description Acknowledge  
 Status Pending Supplier Acknowledgment Supplier Contact Source Agreement  
 Buyer Nguyen-Wong, Linda Bill to Location ATCO Electric Ltd Supplier Order

**Warning**

The document will be accepted. Do you want to continue? (PO: 2055013)

OK Cancel



**Note:** Buyer will receive a notification with the acknowledgment.

8. Search the purchase order and the status will be updated to **'Open'**.

The screenshot displays the ATCO Supplier Portal interface for a purchase order. The top navigation bar is purple with the ATCO logo and a user profile icon. Below the header, the purchase order number 1300015078 is shown with a search icon. Action buttons include Acknowledge, View PDF, Actions, Refresh, and Done. The main content area is divided into sections: Main, Contract Terms, and General. The General section contains a table of order details:

Sold to Legal Entity	ATCO Electric - Distribution	Supplier	TEST SUPPLIER	Ordered	125.00 CAD
Bill to BU	ATCO Electric - CA	Supplier Site	EDMONTON1.1	Description	Acknowledge
Order	1300015078	Supplier Contact		Source Agreement	
Status	Open	Bill to Location	ATCO Electric Ltd	Supplier Order	
Buyer	Nguyen-Wong, Linda	Ship to Location	Nisku Distribution Centre	Master Contract	
Creation Date	2021-11-26				

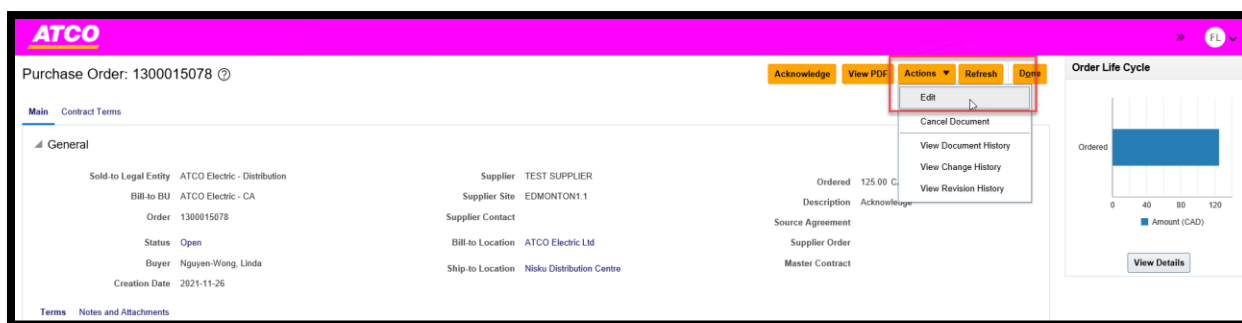
At the bottom of the General section, there are links for Terms and Notes and Attachments. On the right side, there is an 'Order Life Cycle' chart showing a bar for 'Ordered' with a value of 125.00 CAD. A 'View Details' button is located below the chart.

## Reduction to quantity on Open Purchase Order.

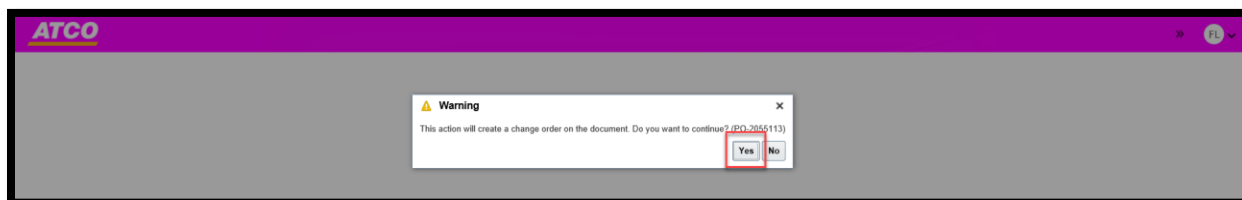
1. Login and navigate to **Supplier Portal** page and click on **Manage Order** or enter the purchase order number in the **Order Number** field and click on the magnifying glass.



2. Click on **Actions** and select **Edit**.



3. On the **Warning** pop-up screen, click **Yes**. Change completed will create a change order that will notify the buyer of the purchase order.



4. Enter comments in the **Description**, **quantity** and enter the **Change Reason**. Click **Submit**.

ATCO

Edit Change Order: 1

Status: Incomplete

Amount Changed: 0.00 CAD

Initiating Party: Supplier

Initiator: FIRST LAST

Creation Date: 2021-11-26

Main Contract Terms

General

Sold to Legal Entity: ATCO Electric - Distribution

Supplier: TEST SUPPLIER

Ordered: 125.00 CAD

Bill to BU: ATCO Electric - CA

Supplier Site: EDMONTON1.1

Description: Acknowledge

Order: 1300015078

Supplier Contact

Agreement

Status: Open

Bill to Location: ATCO Electric Ltd

Master Contract

Buyer: Nguyen-Wong, Linda

Default Ship to Location: Nisku Distribution Centre

Creation Date: 2021-11-26

Terms Notes and Attachments

Payment Terms: Net 30

Shipping Method: INCOTERMS

Additional Information

Award Justification: Meets Procurement Guidelines

Transmission Direct: Assign

Work Order: Context Prompt

Context Prompt: [ ]

Lines Schedules

Line	Description	Supplier Item	Quantity	JOM	Price	Ordered	Location	Note to Supplier	Change Reason	Workorder
1	Acknowledgement TEST		3	EA	25.00	125.00	Nisku Distribu...		Qty not available	

Columns Hidden: 20

5. On the **Confirmation** pop-up, click **OK**.

ATCO

Purchase Order: 1300015078

Acknowledge View PDF Actions Refresh Done

Main Contract Terms

General

Sold to Legal Entity: ATCO Electric - Distribution

Supplier: TEST SUPPLIER

Ordered: 125.00 CAD

Bill to BU: ATCO Electric - CA

Supplier Site: EDMONTON1.1

Description: Acknowledge

Order: 1300015078

Supplier Contact

Agreement

Status: Open

Bill to Location: ATCO Electric Ltd

Master Contract

Buyer: Nguyen-Wong, Linda

Default Ship to Location: Nisku Distribution Centre

Creation Date: 2021-11-26

Order Life Cycle

Ordered: 125.00 CAD

Amount (CAD)

View Details

Confirmation

The change order 1 for document Purchase Order number 1300015078 was submitted for approval.

OK

6. On the **Status** 'Open', if there is a you just have to hover over the icon, it will provide more information on the purchase order.





**Note:** The ownership of PO data remains with ATCO. Therefore, the Buyer needs to review the change order requested by the Supplier. Final authority remains with ATCO Procurement team to approve or reject the changes done on purchase order by the supplier.