

## SUPPLIER PORTAL– NEW SUPPLIER REGISTRATION

# Supplier Portal Guide



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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, invoices, and payment information.

The purpose of this document is to familiarize our suppliers with 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.
- 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 - Accounts Payable
- 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. Log in to Oracle Applications Cloud using the URL provided during the registration process.

## 5. NEW SUPPLIER REGISTRATION

Select the registration hyperlink sent to you by Axos. It will navigate you to the “*Register Supplier: Company Details*” page.

Dear Pancho Villa,

We are very excited to announce that Axos Financial has changed the way we receive and process invoices for payment!

The Axos Supplier Portal is an electronic portal that allows vendors to view the status of products and services that they provide to Axos Financial, along with the ability to view purchase orders, submit invoices for payment, view payment statuses in real-time, and update vendor contact information.

**To avoid payment delays, your Billing Department will need to register in the Axos Supplier Portal and submit all invoices directly using this portal by using the registration link below.**

**Note: an Axos purchase order is required to submit your invoices for payment.** Please coordinate with your Axos business representative to obtain a purchase order before submitting your invoices.

Please use the hyperlink below **to register** in the Axos Supplier Portal:

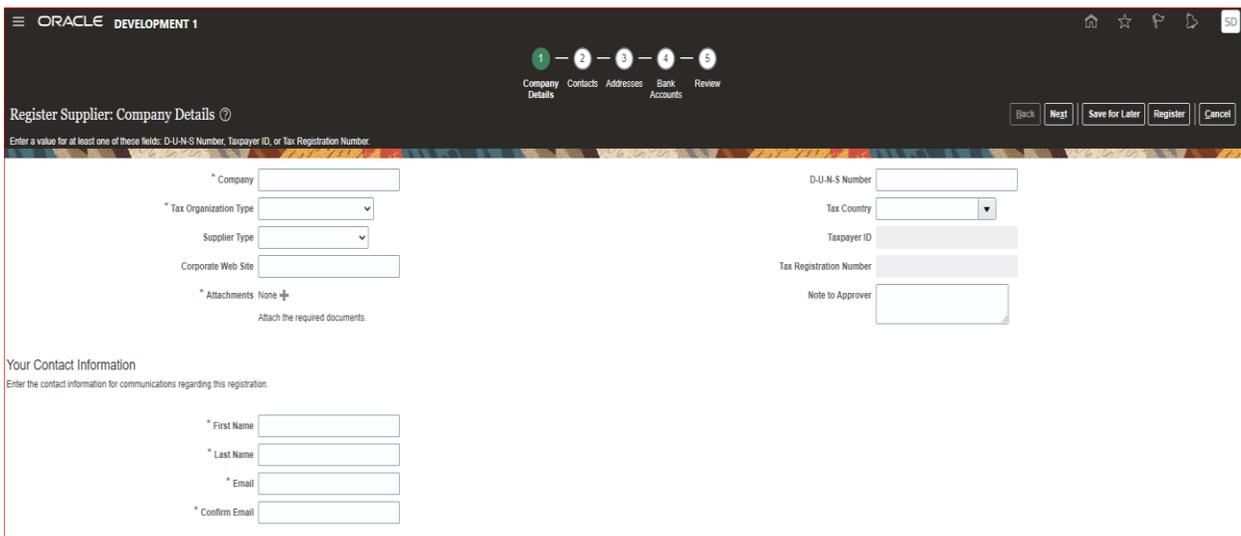
- [Axos Bank Registration URL](#)
- [Axos Invest Inc Registration URL](#)
- [Axos Financial Inc Registration URL](#)
- [Axos Nevada Registration URL](#)

[Axos Supplier Portal Website \(Use for FAQ, Training Videos & Documents\)](#)

### 5.1 Company Details

After selecting the above hyperlink, complete the fields. All the fields marked with an asterisk (\*) in the “*Register Supplier: Company Details*” page – see screen below – are mandatory fields and need to be completed.

**Note:** Taxpayer ID is a mandatory field.



ORACLE DEVELOPMENT 1

1 2 3 4 5  
Company Details Contacts Addresses Bank Accounts Review

Register Supplier: Company Details ⓘ

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

\* Company

\* Tax Organization Type

Supplier Type

Corporate Web Site

\* Attachments None

Attach the required documents.

D-U-N-S Number

Tax Country

Taxpayer ID

Tax Registration Number

Note to Approver

Your Contact Information

Enter the contact information for communications regarding this registration.

\* First Name

\* Last Name

\* Email

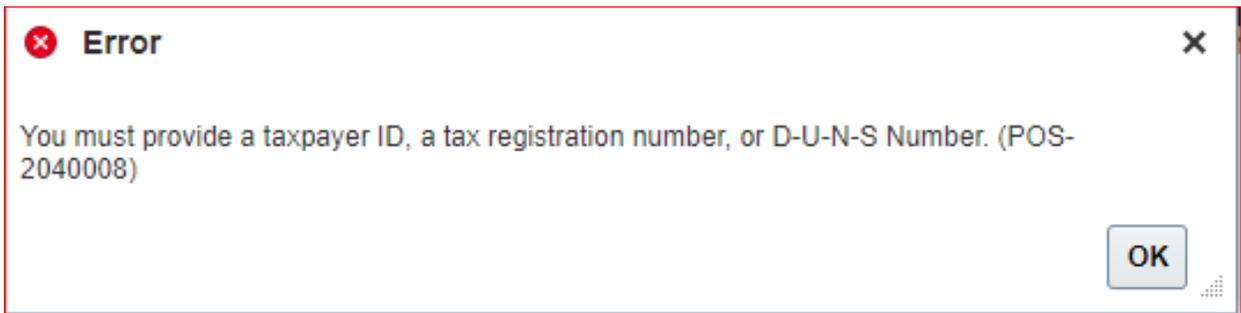
\* Confirm Email

Back Next Save for Later Register Cancel

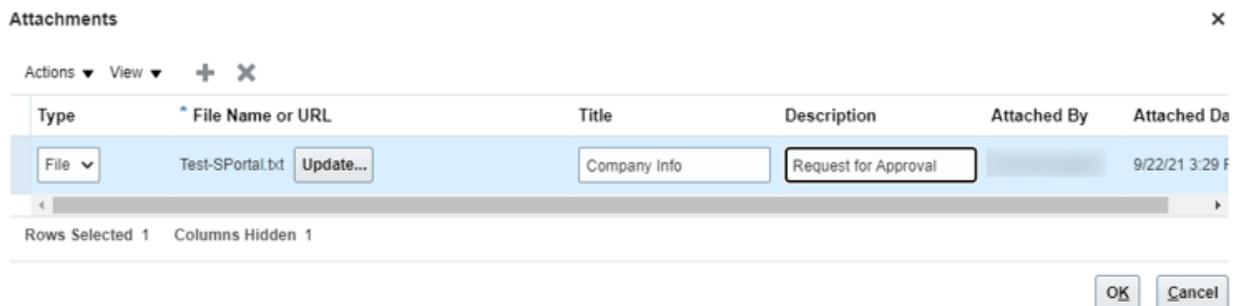
Enter the Company name, Tax Organization Type, Tax Country, Taxpayer ID, and Your Contact Information (Official representative of the Supplier). You may add a note to the Axos approver.

**Note:** Ensure the email address is accurate, as it is used for creating user accounts to access the portal!

Make sure to enter all mandatory fields in the Company Details page including Taxpayer ID or Tax Registration Number to avoid any errors like the below screenshot.



Please be sure to add necessary attachments as part of the Company Details. As shown in the below screenshot. You may add completed W9 and ACH Forms.

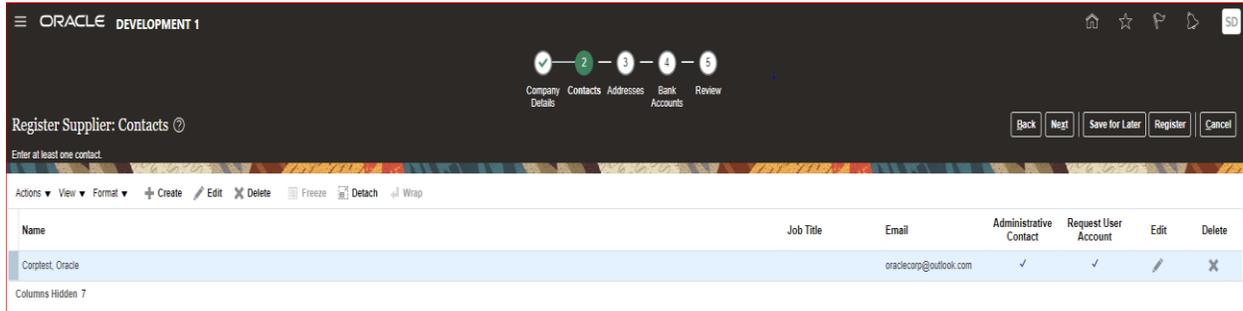


Select the OK button after an attachment is added.

Select the Next button to navigate to the Contacts page.

## 5.2 Select Next – Contacts

It will display the below screen.

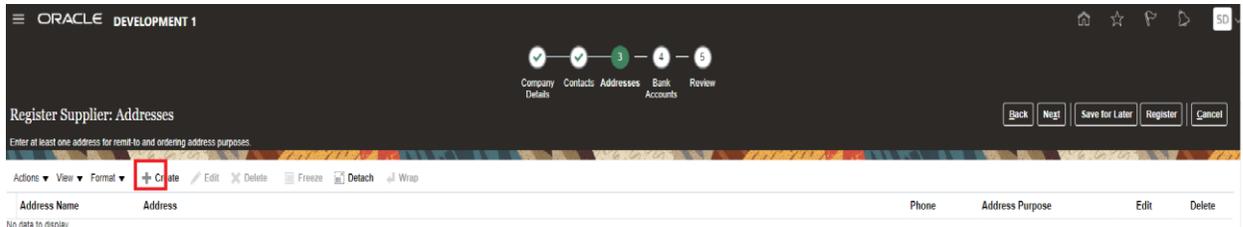


Please note that a contact is defaulted from the information provided in the Company Details page. Select the Create (+) to add additional contacts. Again, be sure that the email is accurate as it is used to create user accounts.

Once all Contacts are entered, select the Next button to progress to the Addresses page.

### 5.3 Addresses

Select Create (+) as shown in the below screen.



Enter the complete Email and Phone, etc.

Enter the Address Name as **MAIN** and enter remaining information. Choose Ordering and Remit to from the Address Purpose.

**Note:** when the “Remit to” box is checked for the address, it will be used as the payment address.

### Create Address

\* Address Name: MAIN

\* Country: United States

Address Line 1: 123 Main St

Address Line 2:

City: San Diego

State: CA

Postal Code: 92121

\* Address Purpose:  Ordering  
 Remit to  
 RFQ or Bidding

Phone: 1 858 123 4567

Fax: 1 858 321

Email: oraclecorp-test@oracle.com

Address Contacts

Select the contacts that are associated with this address.

Actions View Format X Freeze Detach Wrap

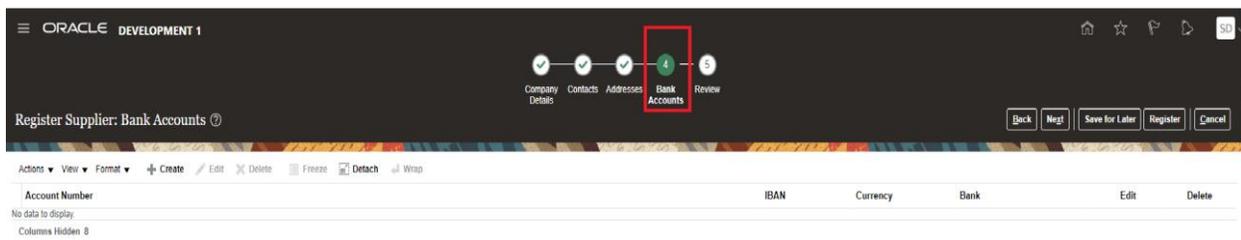
Name	Job Title	Email	Administrative Contact	User Account
No data to display.				
Columns Hidden: 4				

Create Another OK Cancel

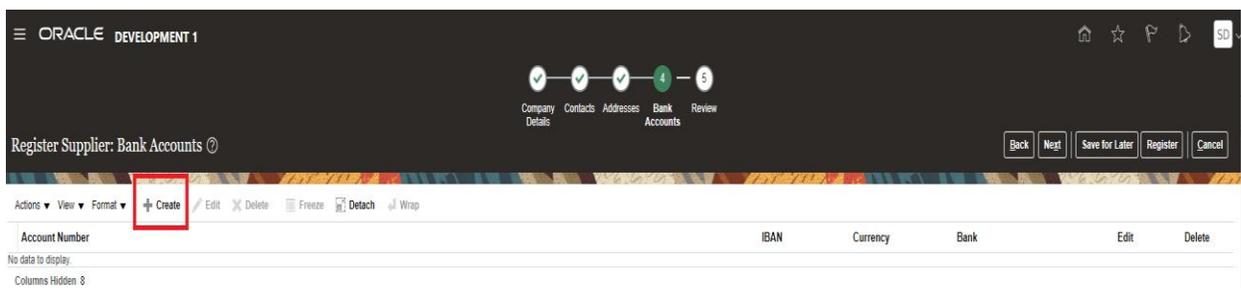
Select the Create Another button or choose the OK button.

Once all addresses information is entered, select the Next button to proceed to the Bank Accounts page.

## 5.4 Bank Accounts



As highlighted in the below screen, select Create (+).



Enter the required information for the Bank Account as shown in the below screen.

Enter United States in the Country field. Choose the Bank and Branch from the list of values in the drop-down menu. Enter all other the necessary information and a Note to Approver.

**Note:** If you do not see your bank or branch listed, please add a comment in the “**Note to Approver**” field below. Please specify the bank, branch, and account number that is missing.

**Create Bank Account**

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

<p>* Country <input type="text" value="United States"/> ▼</p> <p>Bank <input type="text" value="1ST COMMUNITY CREDIT UNION"/> ▼</p> <p>Branch <input type="text" value="275981909"/> ▼</p> <p>* Account Number <input type="text" value="123456789"/></p>	<p>IBAN <input type="text"/></p> <p>Currency <input type="text" value="USD"/> ▼</p>
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**Additional Information**

Account Name <input type="text" value="Oracle Corp TEST"/>	Agency Location Code <input type="text"/>
Alternate Account Name <input type="text"/>	Account Type <input type="text" value=""/> ▼
Account Suffix <input type="text"/>	Description <input type="text"/>
Check Digits <input type="text"/>	

**Comments**

Note to Approver

Select Create Another or OK.

Select the Next button to navigate to the Review page.

**5.5 Review**

It will display the below screen.



# Axos Bank NEW SUPPLIER REGISTRATION

The screenshot shows the 'Review Supplier Registration: Oracle Corp America' page in Oracle Development 1. At the top, a progress bar indicates the current step is 'Review', which is highlighted with a red box. Below the progress bar, there are buttons for 'Back', 'Next', 'Save for Later', 'Register', and 'Cancel'. The main content area is divided into sections: 'Company Details', 'Attachments', 'Contacts', and 'Addresses'. The 'Company Details' section shows information for Oracle Corp America, including tax organization type (CORPORATION), supplier type (MEMBERSHIP), and various tax identification numbers. The 'Attachments' section is currently empty. The 'Contacts' section displays a table with one contact: Corplest, Oracle, with email oraclecorp@outlook.com. The 'Addresses' section displays a table with one address: MAIN, 123 Main St, SAN DIEGO, CA 92121.

You may review all the information that has been added in the Portal. If something needs to be changed, select the Back button, or choose the appropriate [CR1][RB2]train navigation step, and edit accordingly.

## 5.6 Review Details

As highlighted in the below screen, select Details to view details of respective data.

This screenshot is identical to the one above, but with a red box highlighting the 'Details' button in the 'Contacts' table. The 'Details' button is located at the end of the row for the contact 'Corplest, Oracle'.

### 5.7 Register

Select Save for Later and complete any additional information. You can Register now or after you complete the reviewCR3RB4.



Your registration request was submitted.

After you register in the portal, you will receive two emails from the Axos Supplier Portal:

1. **“Axos Financial Supplier Portal-Welcome E-Mail”** - email asking you to reset your password for accessing the Axos Supplier Portal.
2. **“FYI: Supplier Contact User Account for Axos Financial Was Created”** – email letting you know that an Oracle account has been created for you. Used to access the supplier portal after registration is complete.

### 5.8 Sign Out

Select the Sign Out hyperlink as highlighted in the below screenshot.

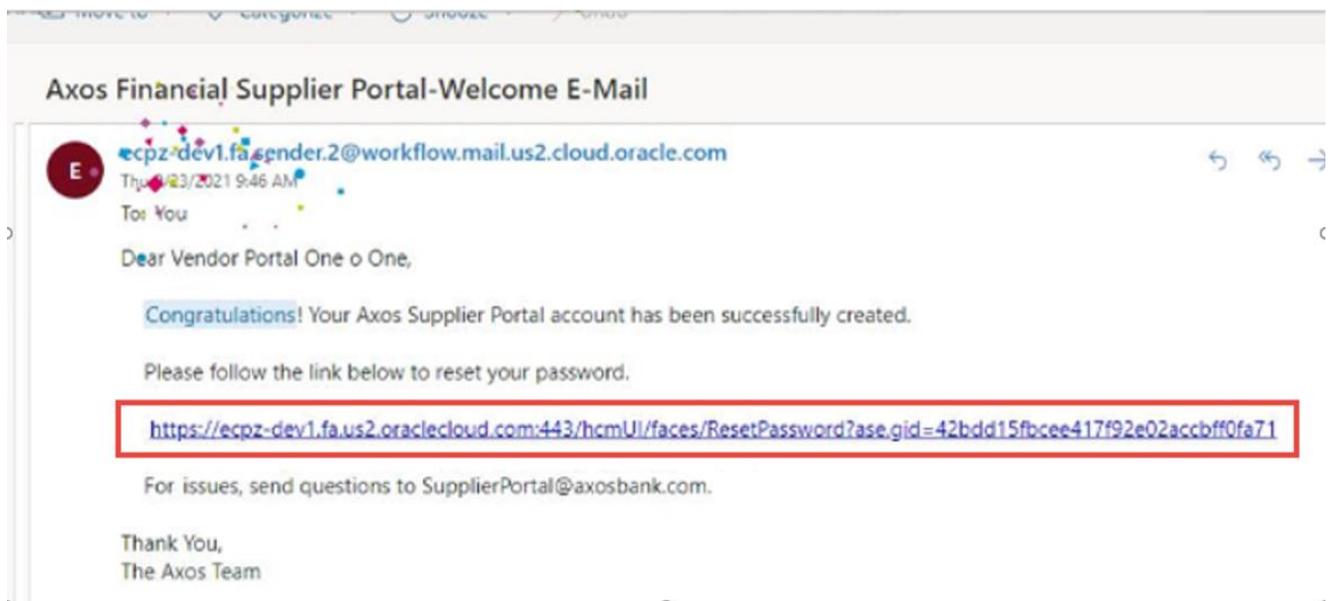


**6. APPENDICES:**

Appendix 1: Axos Financial Supplier Portal -Welcome [RB5] E-Mail. Includes hyperlink used to reset password for the initial login.

[CR6][RB7]

**Axos Financial Supplier Portal-Welcome E-Mail**



Appendix 2: FYI: Supplier Contact User Account for Axos Financial was Created. Contains a hyperlink used to access the Axos Supplier Portal (Access the application) after the registration process is complete.

Supplier Contact User Account for Axos Financial was Created

FYI: Supplier Contact User Account for Axos Financial was Created

**D** Development 1 Test notification <ecpz-dev1.fa.sender.2@workflow.mail.us2.cloud.oracle.com>  
Thu 9/23/2021 9:46 AM  
To: You

**Supplier Contact User Account for Axos Financial was Created**

Details

Assignee	Vendor Portal One o One	Supplier	Oracle
Assigned Date	9/23/21 9:46 AM	Supplier Number	13368
Expiration Date	10/23/21 9:46 AM		
Task Number	617119		

Recommended Actions

You were granted access to the supplier application for Axos Financial. A separate email will be sent to you with the instruction to access the application.

[Access the application.](#)

User Account Details

Used to login to the Supplier Portal.

Assigned Roles

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by.