GEP SMART
NextGen

Supplier User Guide

Version History

GEP SMART is a cloud-based Software-as-a-Service (SaaS) platform that is regularly updated to provide enhanced features and an improved user experience. The update log for this guide is noted below.

Version	Revision Date	Description of Changes
1.0	29 February 2024	Supplier User Guide
2.0	20 December 2024	e-Invoice Requirements

Table of Content

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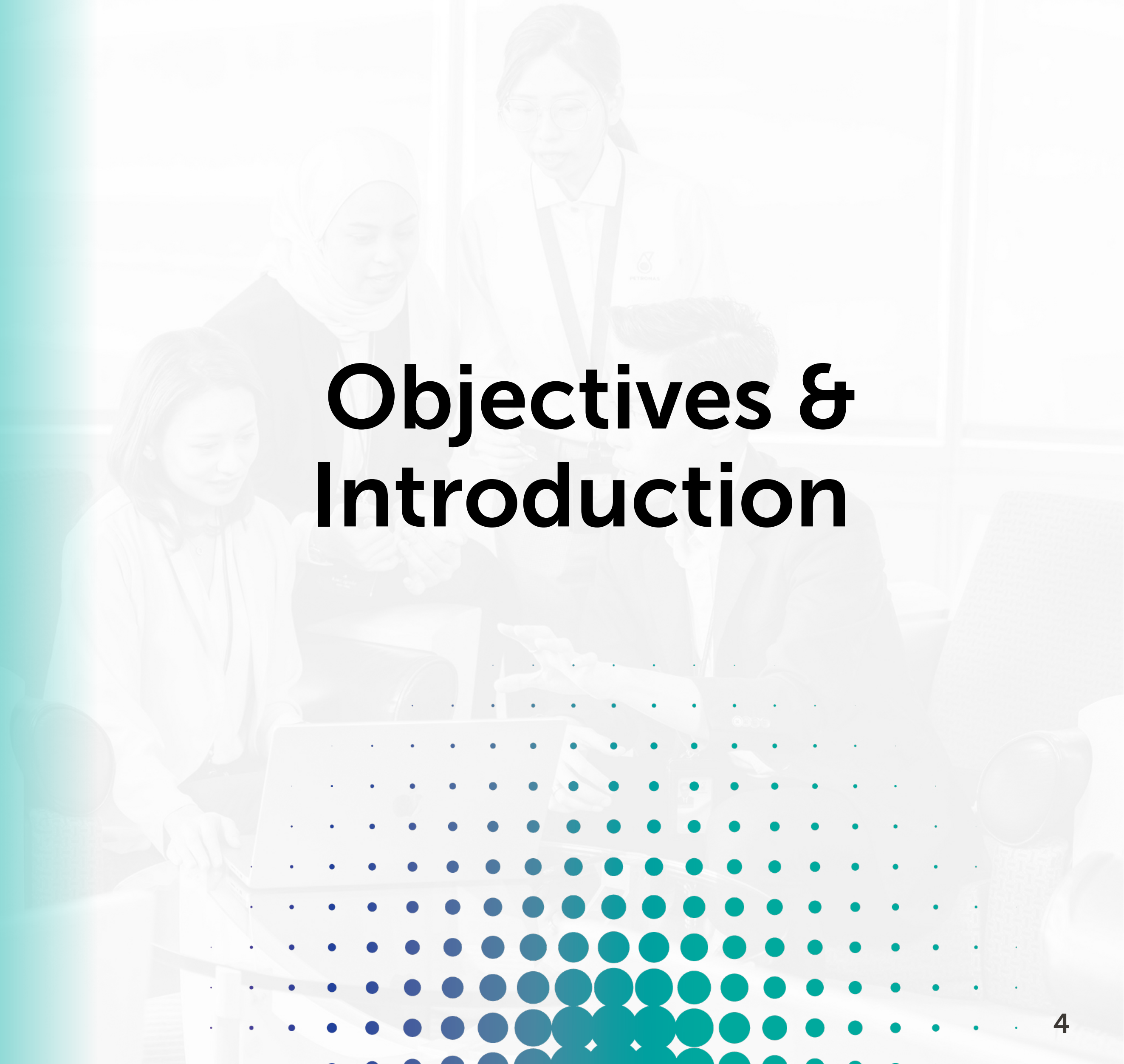


Objectives & Introduction

Objectives

The purpose of this document is to provide an overview and step-by-step training on system navigation, as well as the capability to perform procurement functions using the system.

The contents curated in this document allows the suppliers to achieve the following:

1. To obtain the understanding on how to navigate through the procurement platform and its functionalities.
2. To be equipped with sufficient knowledge to use the system based on the functions and features available.
3. To recognise the high-level benefits of the system and the new ways of working around it.

Introduction to GEP SMART®

We are going digital to transform the procurement process into a streamlined experience on a single platform for both internal and external users of the system.

A unified cloud-based end-to-end Source-to-Pay (S2P) procurement platform

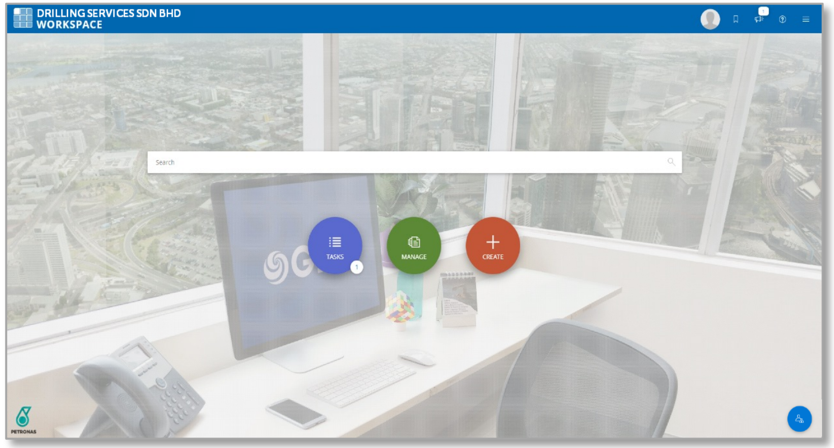
- Centralised bid submission
- Seamless tender clarification
- Quick view of contractual documents
- Streamlined invoice submission
- Improved processing of purchase orders

GEP SMART® at-a-glance

New simplified and compact Home Page.

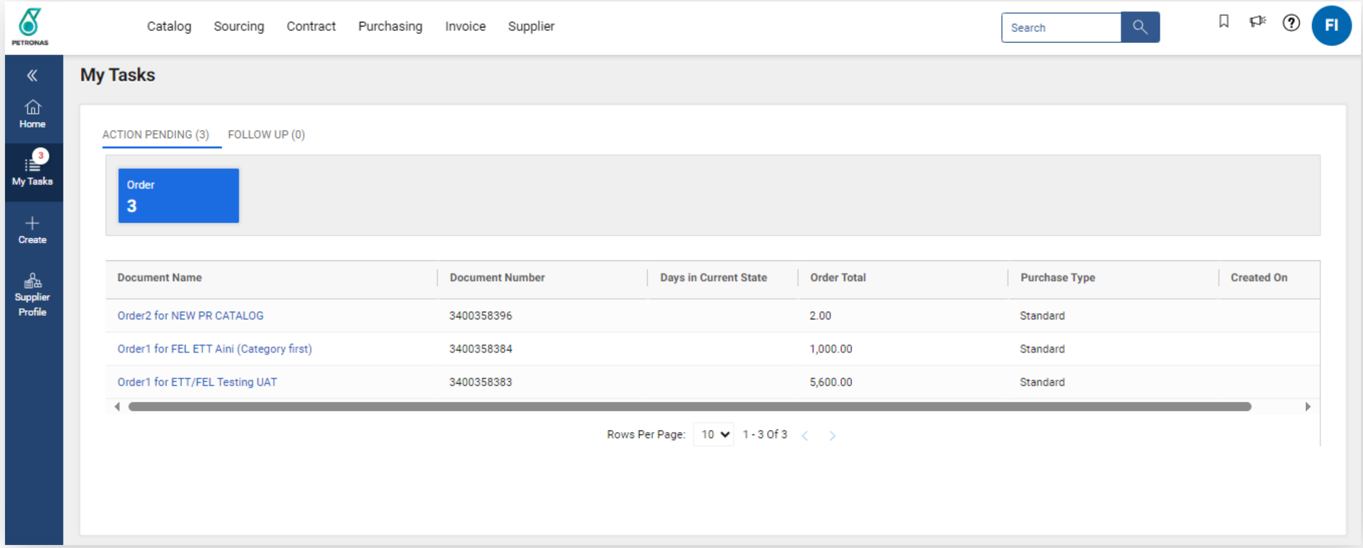
Before

Less information displayed in landing page that requires multiple clicking before reaching to a document.



After

Simplified and at-a-glance information display that is intuitive and less clicking which elevates user experience.

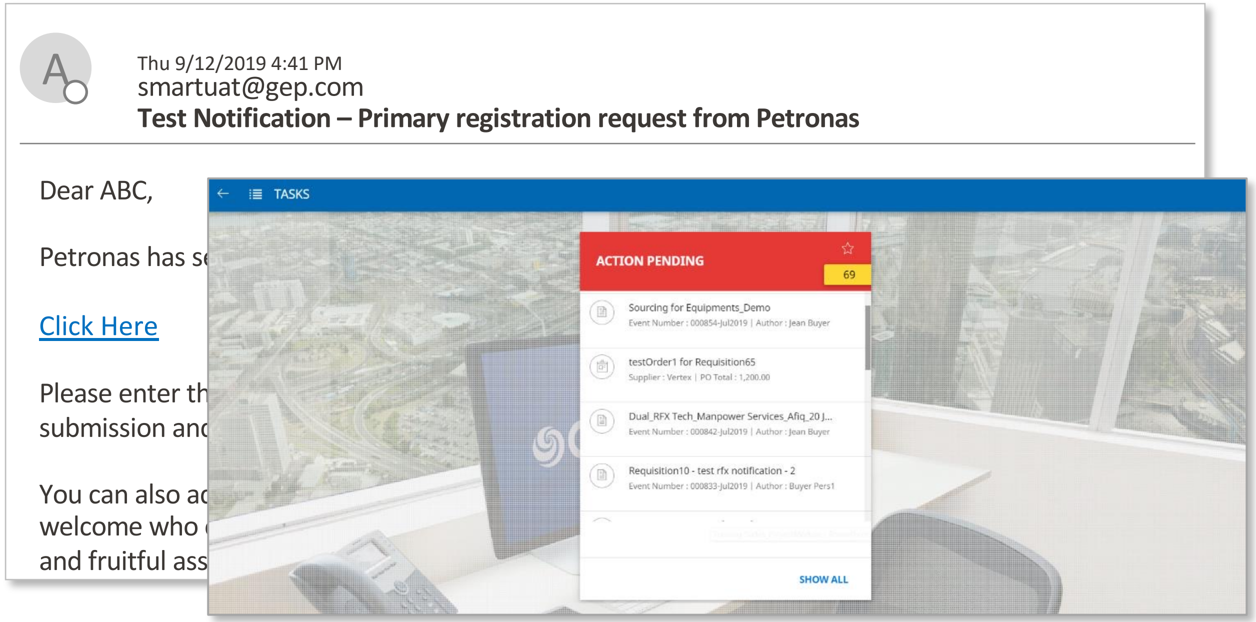


GEP SMART® at-a-glance

A central, secure archive and well organised for RFx.

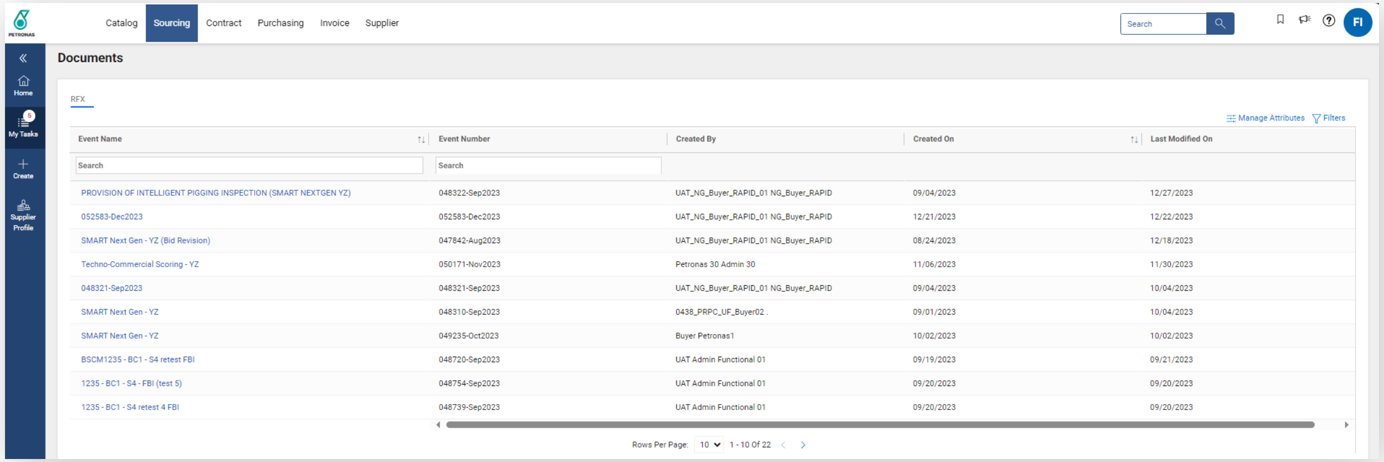
Before

Limited view of documents which requires multiple clicking before getting to a specific RFx.



After

RFx are displayed together with high level details for ease of reference and searching by user which helps to increase efficiency and productivity.

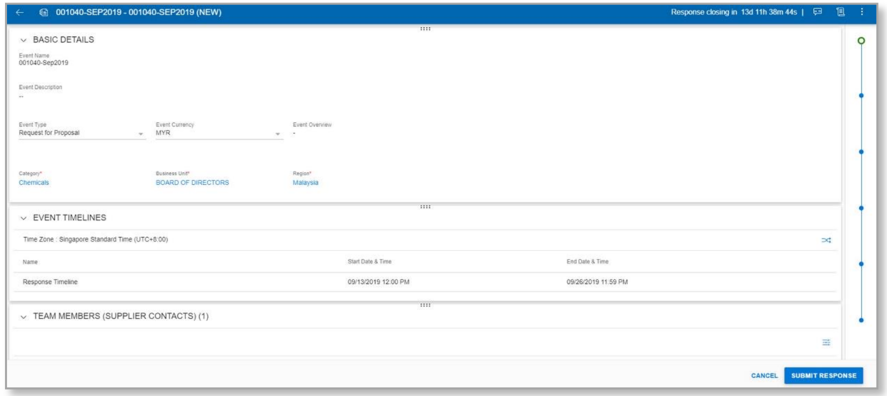


GEP SMART® at-a-glance

Online bid submissions reduces administrative efforts.

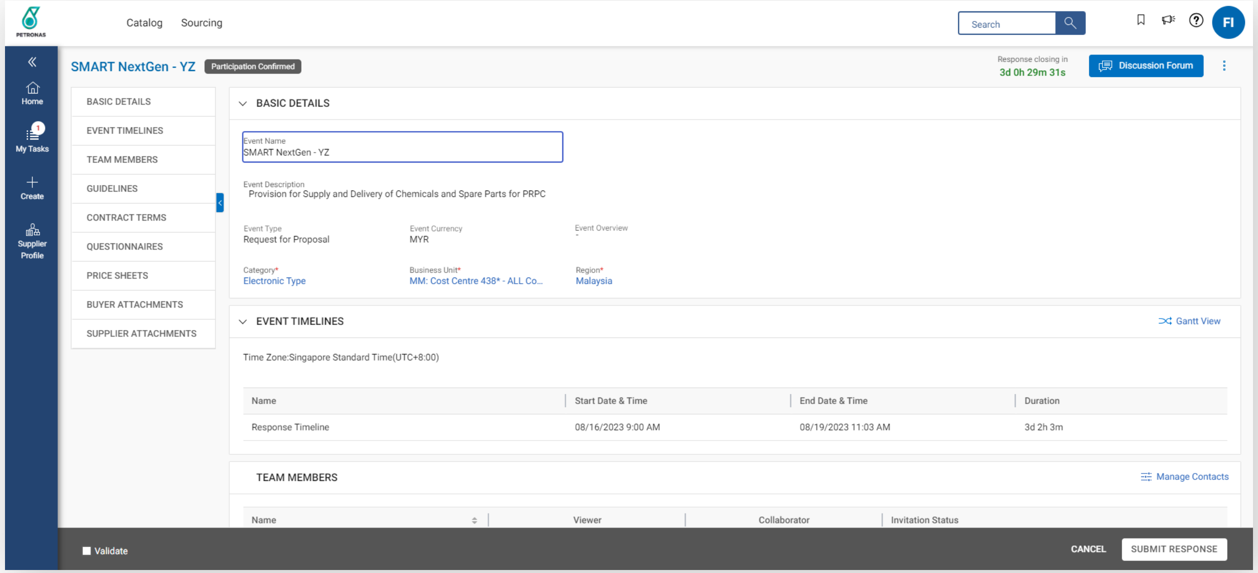
Before

Bid submissions are done online in the system and only softcopy submissions are required.



After

Introduction of navigation pane which provides easy navigation through the sections of bid submission for users.

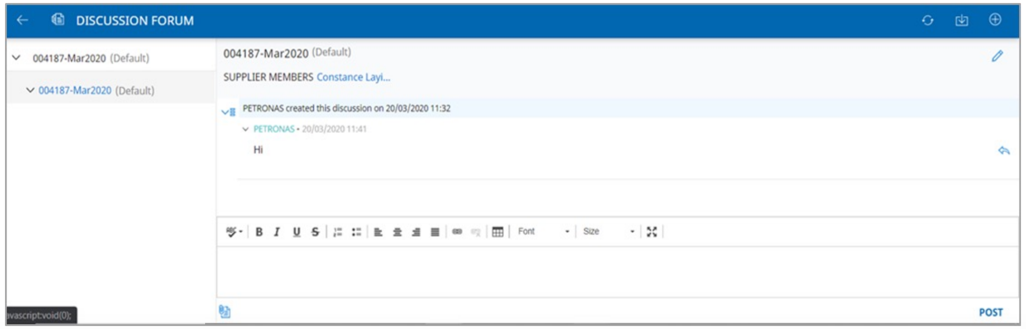


GEP SMART® at-a-glance

A consolidated channel for tender clarification and negotiation.

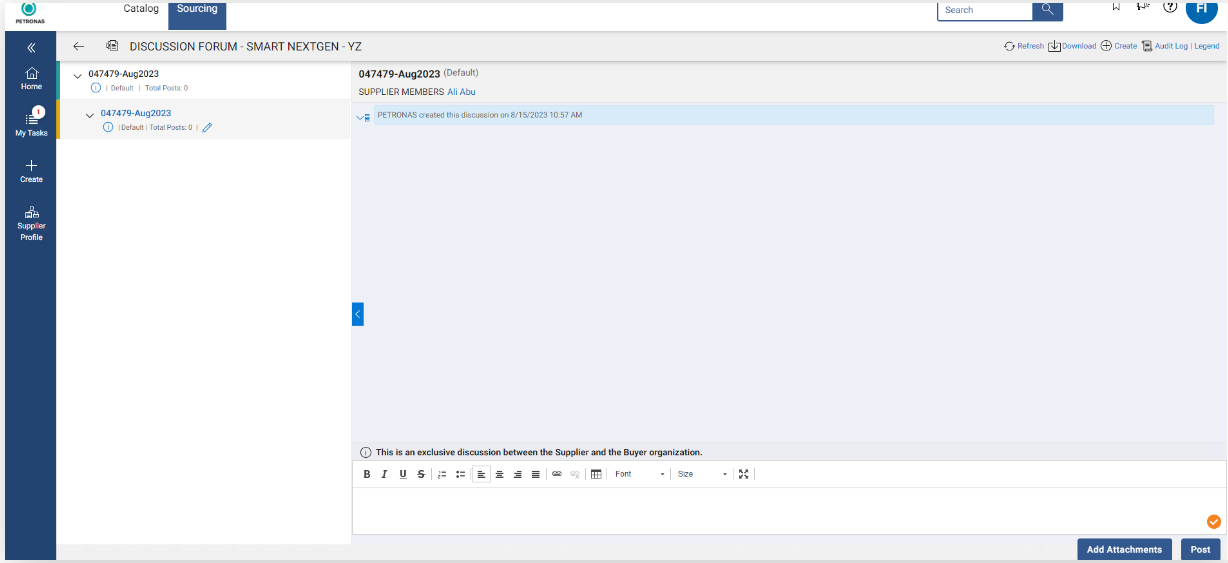
Before

A dedicated discussion forum and repository are embedded for clarification purposes.



After

Refresh User Interface of Discussion Forum and repository for better user experience.

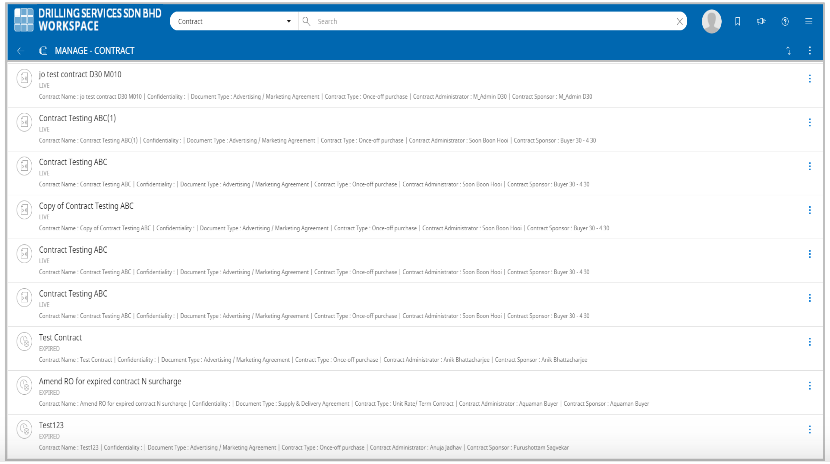


GEP SMART® at-a-glance

An accessible central repository to view awarded contracts.

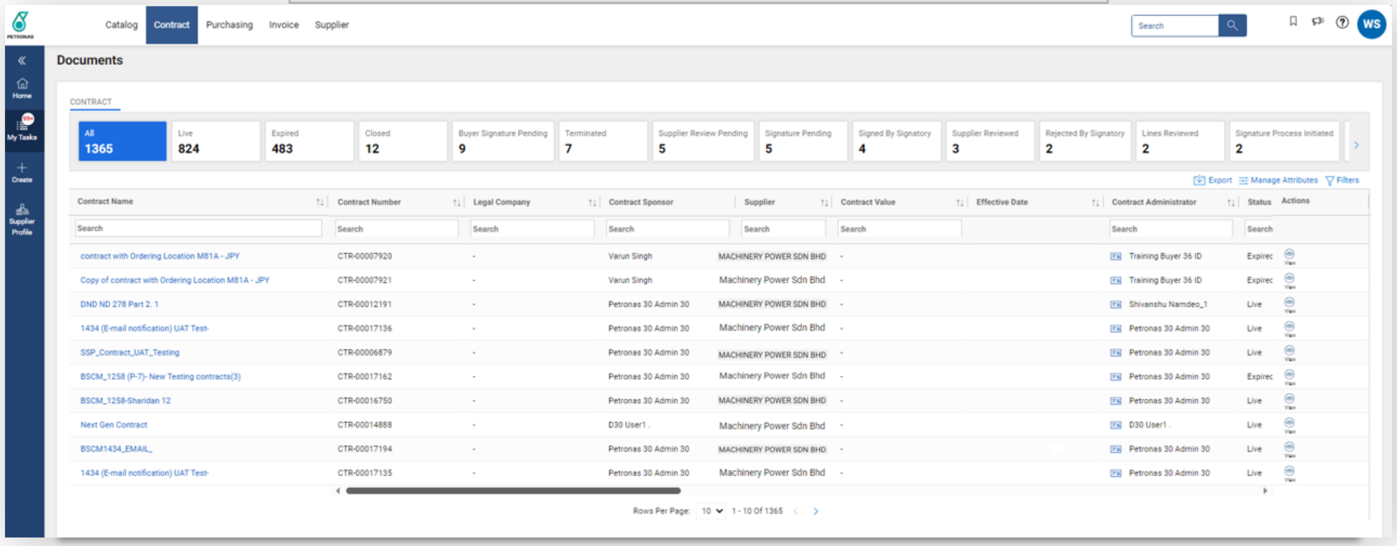
Before

Single source-of-truth repository for contract document quick view.



After

Single source-of-truth repository for contract which has been organised according to its statuses for better quick view.



GEP SMART® at-a-glance

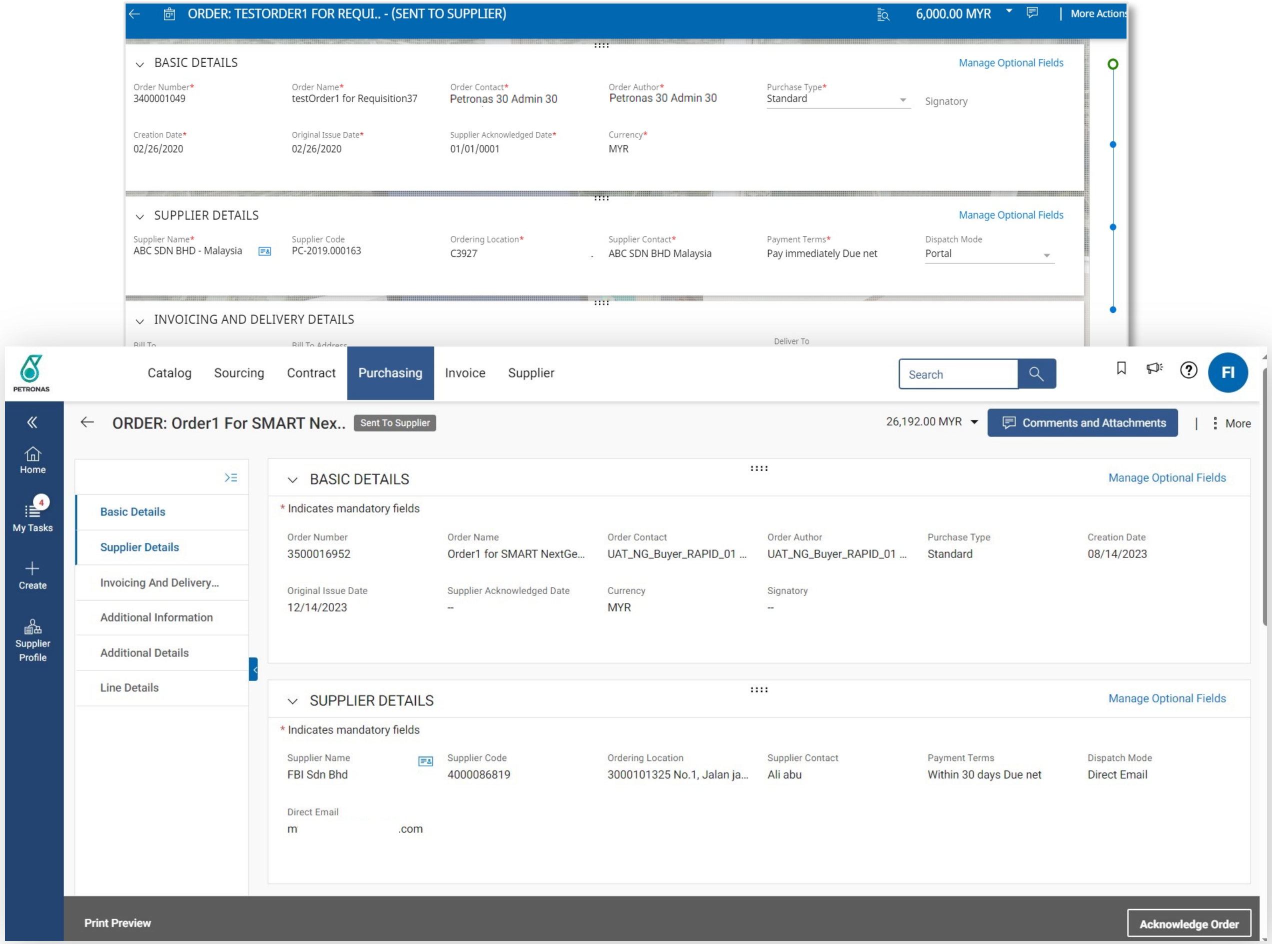
Online issuance of Purchase Orders (PO) via GEP SMART.

Before

All Purchase Orders are accessible and can be acknowledged via GEP SMART.

After

Improved interface as all Purchase Orders are easy to navigate with navigation pane and able to be acknowledged.

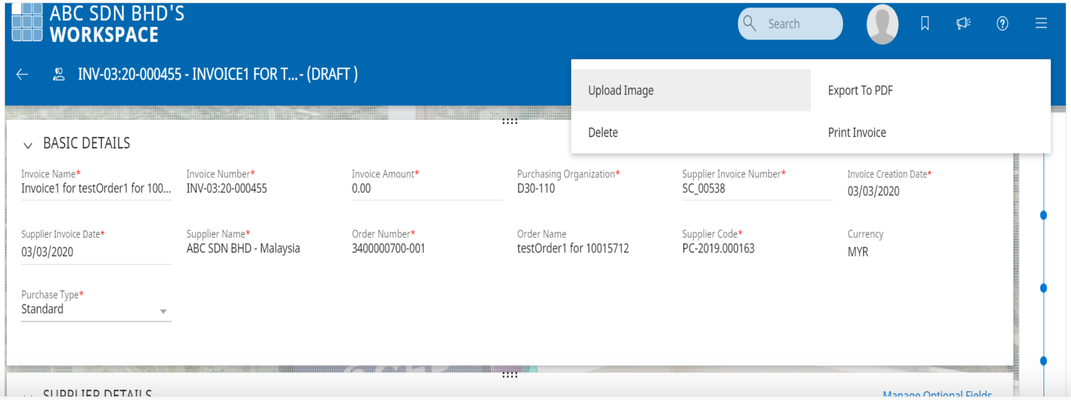


GEP SMART® at-a-glance

Streamlined Invoice submission via GEP SMART.

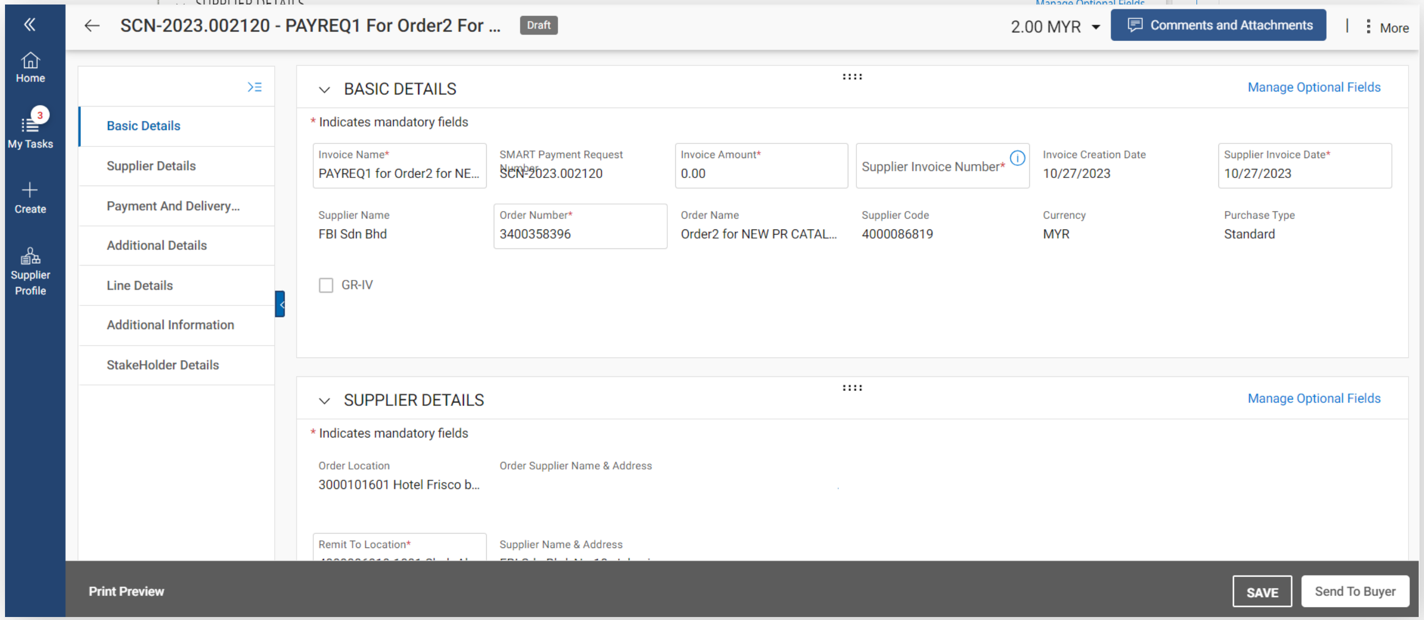
Before

Online invoice submission for all GEP SMART generated POs.



After

Improved efficiency as all Invoice are displayed according to statuses for easy navigation.



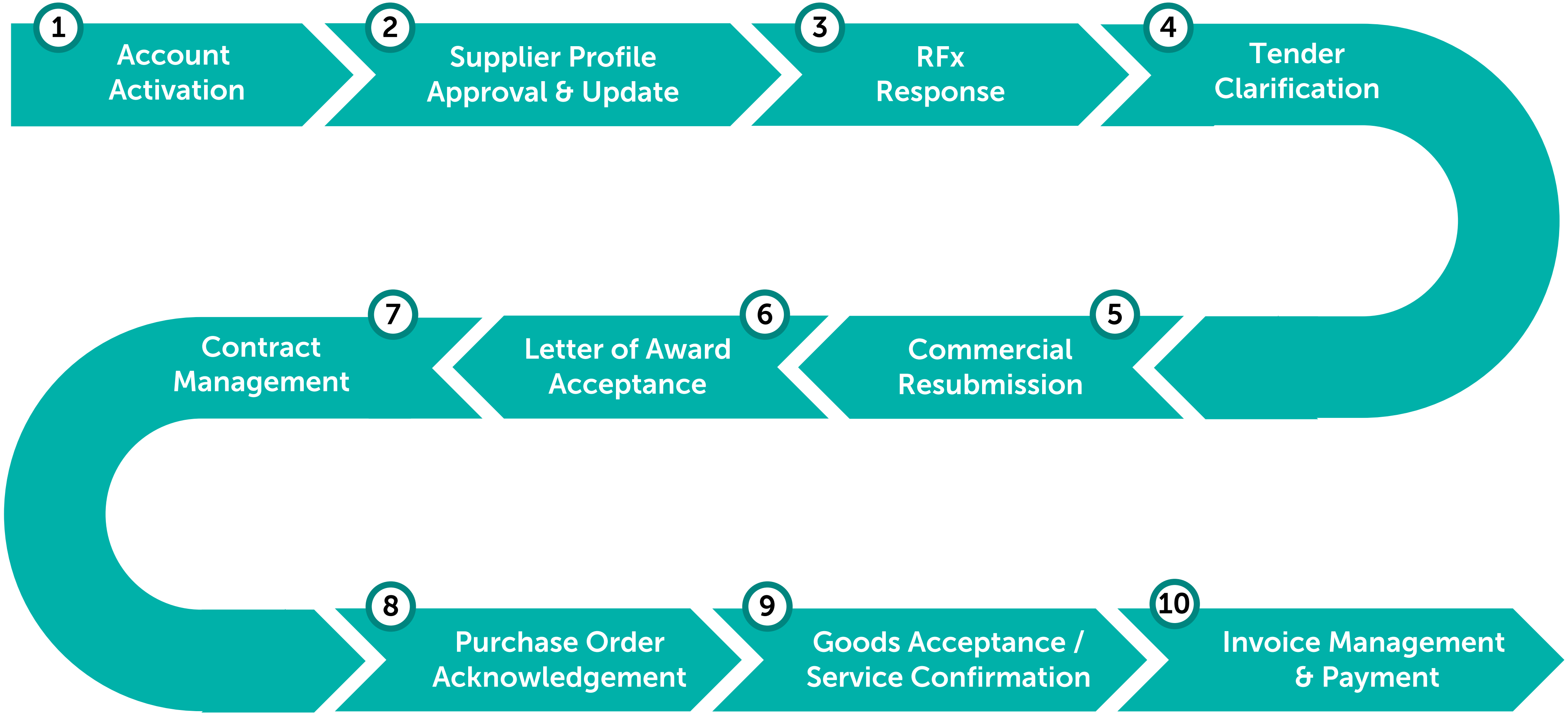
GEP SMART
NextGen

Supplier User Guide

Application Deep Dive

Procurement in GEP SMART

Overview of GEP SMART functions and process flow for Supplier from activating account up to Invoice Management & Payment



Procurement in GEP SMART® (Pre-Award)

Overview of GEP SMART functions and process flow for Supplier from activating account up to Invoice Management & Payment

General Functions

1 Account Activation	2 Supplier Profile Approval & Update	3 RFx Response	4 Tender Clarification	5 Commercial Resubmission
• Prior to the tender process, suppliers are expected to register and activate their account in the system, which will be enabled through the receipt of Primary Registration Form (PRF) link via email.	• After account activation, suppliers are required to complete and submit their supplier profile for approval prior to be eligible for RFx Award and to receive Purchase Order. • Suppliers are also able to update their company profile and contact information.	• To initiate the tendering process, suppliers need to accept the general guidelines or terms & conditions to express intent for participation. • Suppliers will be able to submit their responses or bid submission through system.	• Any clarifications required regarding the tender and/or bid submissions can be raised through the online Discussion Forum in the system. • All queries will be documented.	• During the tendering process, buyers have the discretion to conduct negotiation activities. • Post negotiation events, suppliers will be required to revise their price sheet, where applicable.
Account Creation & Self-Activation	**Supplier Profile Approval from PETRONAS**	**Submission of Technical & Commercial Requirements**	**Online Discussion Forum**	**Negotiation**

Procurement in GEP SMART® (Post-Award)

Overview of GEP SMART functions and process flow for Supplier from activating account up to Invoice Management & Payment

General Functions

6 LOA Acceptance	7 Contract Management	8 Purchase Order Acknowledgement	9 Goods Acceptance / Service Confirmation	10 Invoice Management & Payment
• LOA Acceptance will be initiated in the system via the Discussion Forum where successful suppliers are required to acknowledge accordingly.	• Suppliers will be able to access the central contract repository to view all the contracts made accessible to them. • It is supplier's responsibility to fulfil the contract obligations as and when required.	• Purchase Orders are sent to suppliers in the system. • Suppliers will be able to view and create PO Acknowledgment. • This is required to confirm the PO details prior to delivery of item or initiation of services.	• Acceptance process for material goods (GRN) will be done by PETRONAS upon receipt of item at site. • Service Confirmation however will be created by supplier in the system upon service completion. • Supplier able to view item quantity in Purchase Order	• Payment Requests can be initiated by supplier upon Service Confirmation and/or Good Acceptance by PETRONAS. • Suppliers to create the necessary Payment Request in SMART by GEP®. • Where needed Suppliers can create a Credit Memo in SMART by GEP®
Letter of Award	**Consolidated View of Contractual Documents**	**Confirmation of Purchase Orders**	**Receipt (GRN) / Service Confirmation**	**Submission of Payment Request**

General Functions

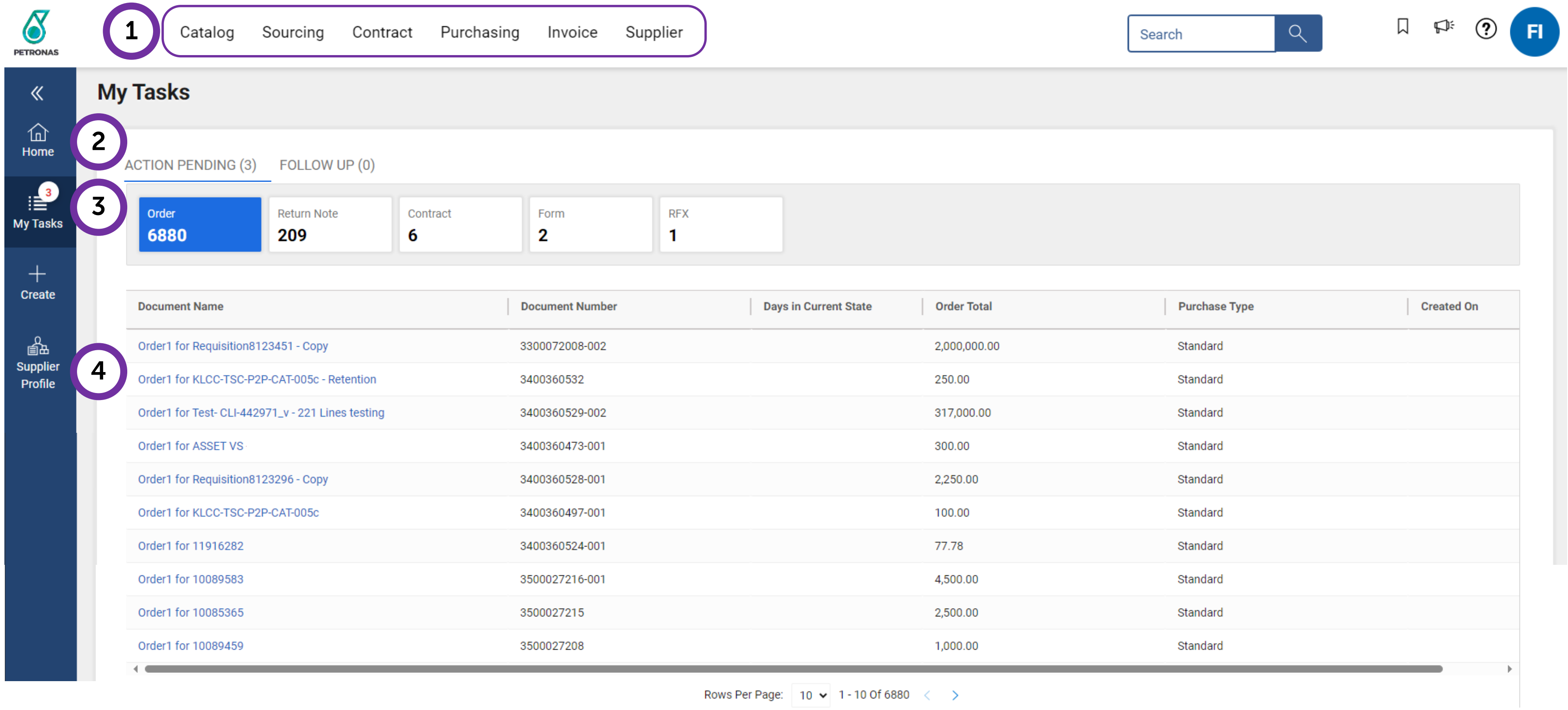
The system's general functions and features are covered in this section.

Learning Objectives

Suppliers will be able to learn basic features and familiarise themselves with the system's interface and navigate through it.

1. **Home Page**
2. **Update Contact**

Home Page

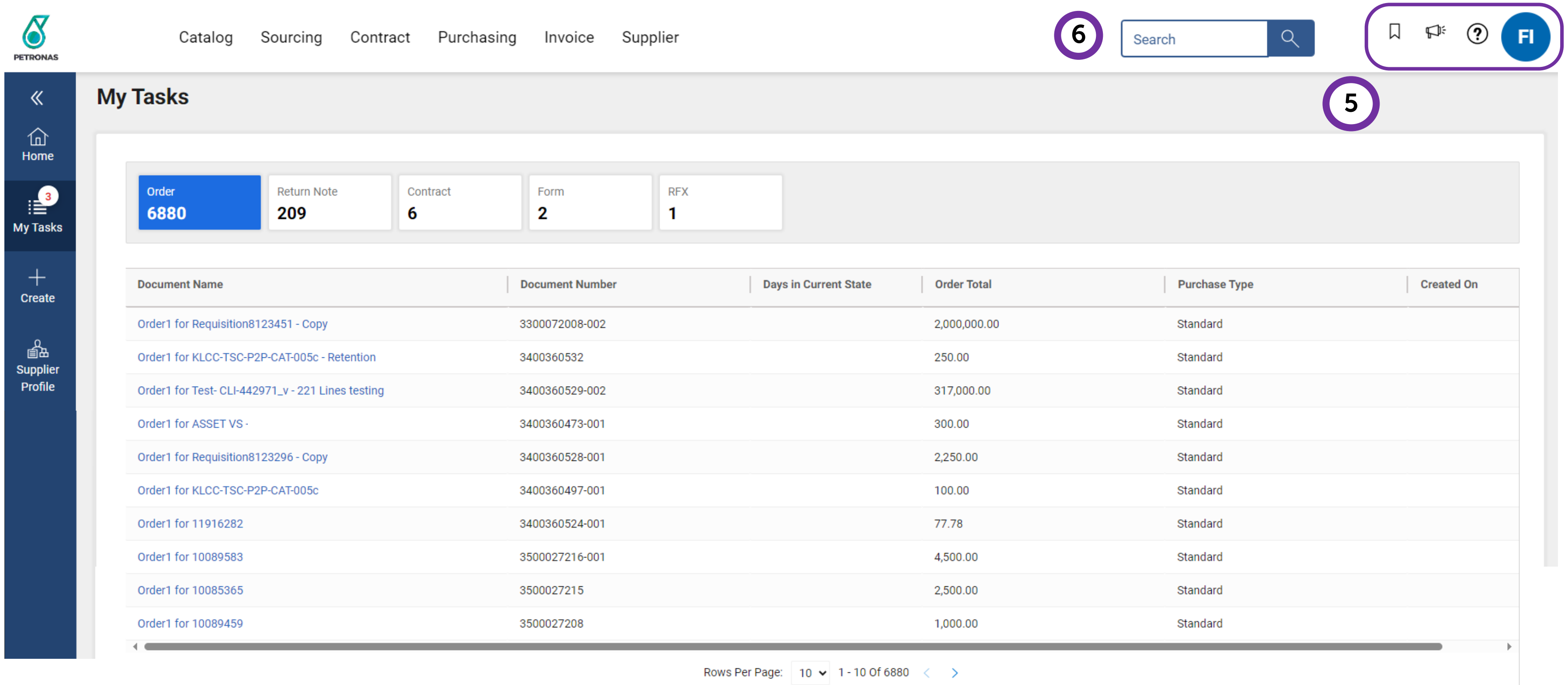


1	Documents are organised according to category (i.e., Catalog, Sourcing, Contract, Purchasing, Invoice & Supplier) Supplier able to easily search relevant documents within same category.
2	Click on **'Home'** button to return to first landing page.
3	Under **'My Tasks'**, documents are organised under same category (i.e., Order, RFx, Contract & etc. **Action Pending** - documents that are awaiting supplier action **Follow Up** – documents that already submitted to buyer
4	**'Supplier Profile'** is where supplier able to view and amend Supplier Profile Basic Details, Contact Information, Location Information & etc.

Please **DO NOT use 'Create'** button to create **Credit Memo, Invoice & Service Confirmation**. These documents are follow-on documents which to be created from respective documents issued (i.e., Purchase Order > Service Confirmation / Receipt > Invoice > Credit Memo [if any]).

Home Page

1 Home Page
2 Update Contact



5	The **'My Profile'** section brings you to the general settings of your account. FI The **'My Bookmarks'** section enables you to add and view your bookmarks, for quick access to pages that you frequently visit. The '**Announcements'** functionality helps you to view all your latest announcements and notifications. The **'Support'** icon shows the support numbers you can contact if you have any queries.
6	When you search for keyword(s) in the **'Search'** field, the collated displayed results are documents from the entire Workspace domain containing the searched keyword(s).

Update Supplier Contact Number

There are 3 different ways to update the Supplier contact number in GEP SMART.

1

Via Primary Registration Form (PRF)

Done when first registering on GEP SMART as a new user or as a user with an existing account other than PETRONAS.

2

After receiving published RFx

Done on the RFx page itself at the Team Member section.

3

In the Supplier Profile itself

Done from the homepage via the Supplier Profile button.

Application Deep Dive

Account Activation

The activation of GEP SMART account will be initiated through the Primary Registration Form (PRF) link sent via email to identified suppliers to kick-start the profile completion prior to participating in tendering process.

Learning Objectives

Suppliers will be able to create and perform account activation in the system.

1. Receive PRF
2. Create Account
3. Activate Account

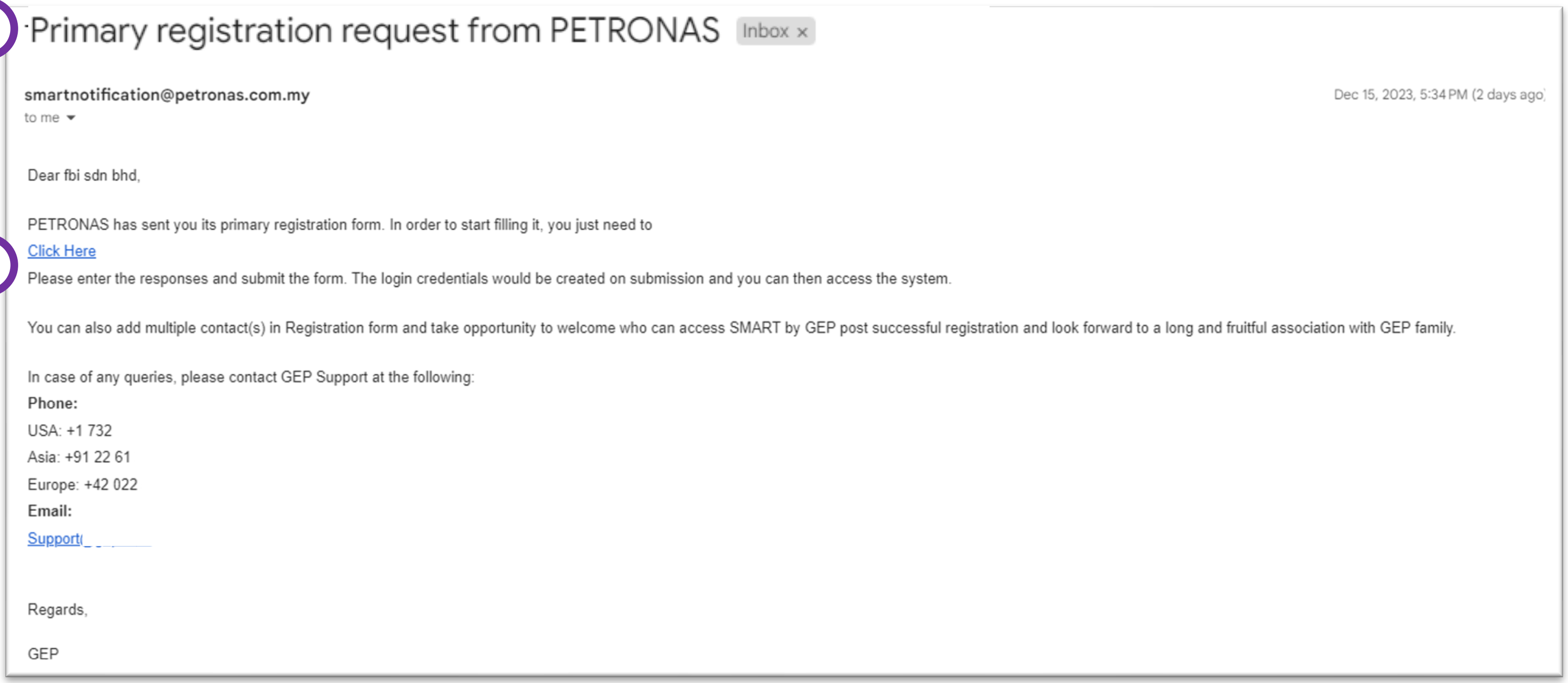
Receiving Primary Registration Form (PRF)

1 Receive PRF — 2 Create Account — 3 Activate Account

A system generated email containing the PRF link will be sent to the identified suppliers.

1

2



Primary registration request from PETRONAS Inbox ×

smartnotification@petronas.com.my

to me

Dec 15, 2023, 5:34 PM (2 days ago)

Dear fbi sdn bhd,

PETRONAS has sent you its primary registration form. In order to start filling it, you just need to

Click Here

Please enter the responses and submit the form. The login credentials would be created on submission and you can then access the system.

You can also add multiple contact(s) in Registration form and take opportunity to welcome who can access SMART by GEP post successful registration and look forward to a long and fruitful association with GEP family.

In case of any queries, please contact GEP Support at the following:

Phone:

USA: +1 732

Asia: +91 22 61

Europe: +42 022

Email:

Support(

Regards,

GEP

1	Upon invitation to create account in GEP SMART, supplier will receive a system generated email containing the **Primary Registration Form (PRF)** and registration instructions.
2	Suppliers with **no GEP SMART account with PETRONAS** shall click this link to validate and activate their profile for access prior to participating in tendering process. Note: Supplier Account Activation applies for **first-time** registration only. Supplier with an **existing GEP SMART account with PETRONAS** may skip this process.

It is imperative to **update your current contact details** and ensure the correct email address is provided to **minimise the risk of not receiving RFx**.

Create Account

For account creation in GEP SMART, suppliers are advised to use the same email address used to receive the PRF in the previous step.

PETRONAS

Hi Ali Abu,

You have been invited by PETRONAS to be a supplier and represent FBI Sdn Bhd

Want to register as a new user. Create your SMART by GEP Account by registering as a new user Click Here 1

If you already have an existing SMART by GEP account and want to link this new profile, register as an existing user Click Here . 2

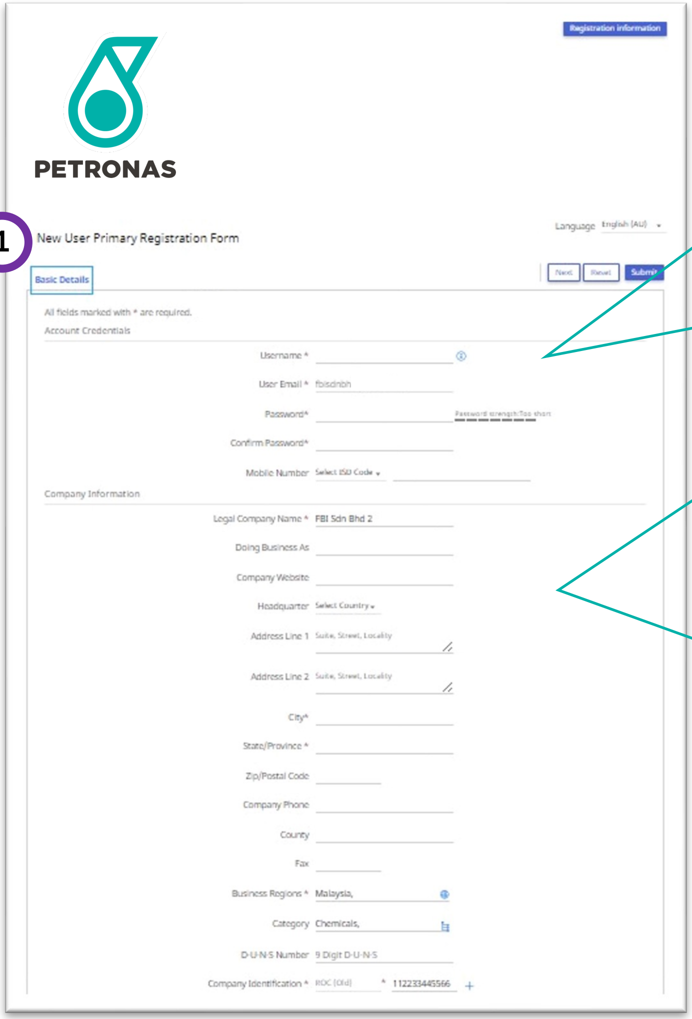
Thanks,
SMART by GEP Team

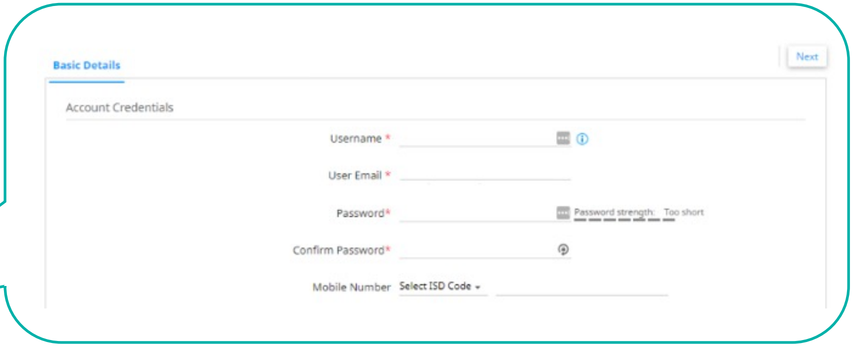
1	Click Here to sign up as a new user and create a new GEP SMART account. Note: Please use the same email address used to receive PRF from PETRONAS.
2	If you already have an existing GEP SMART Account for other company, Click Here to use the same credential for access. Note: The email used for registration must be the same email used to receive PRF for both PETRONAS and the other company.

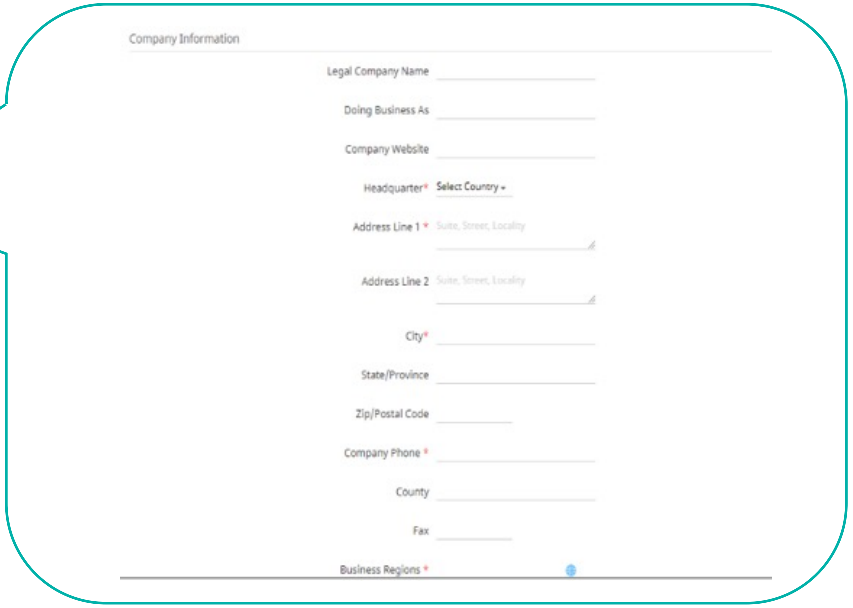
1 Receive PRF — 2 Create Account — 3 Activate Account

Create Account (New User)

Creating new user account with PETRONAS using the same email used to receive the PRF.



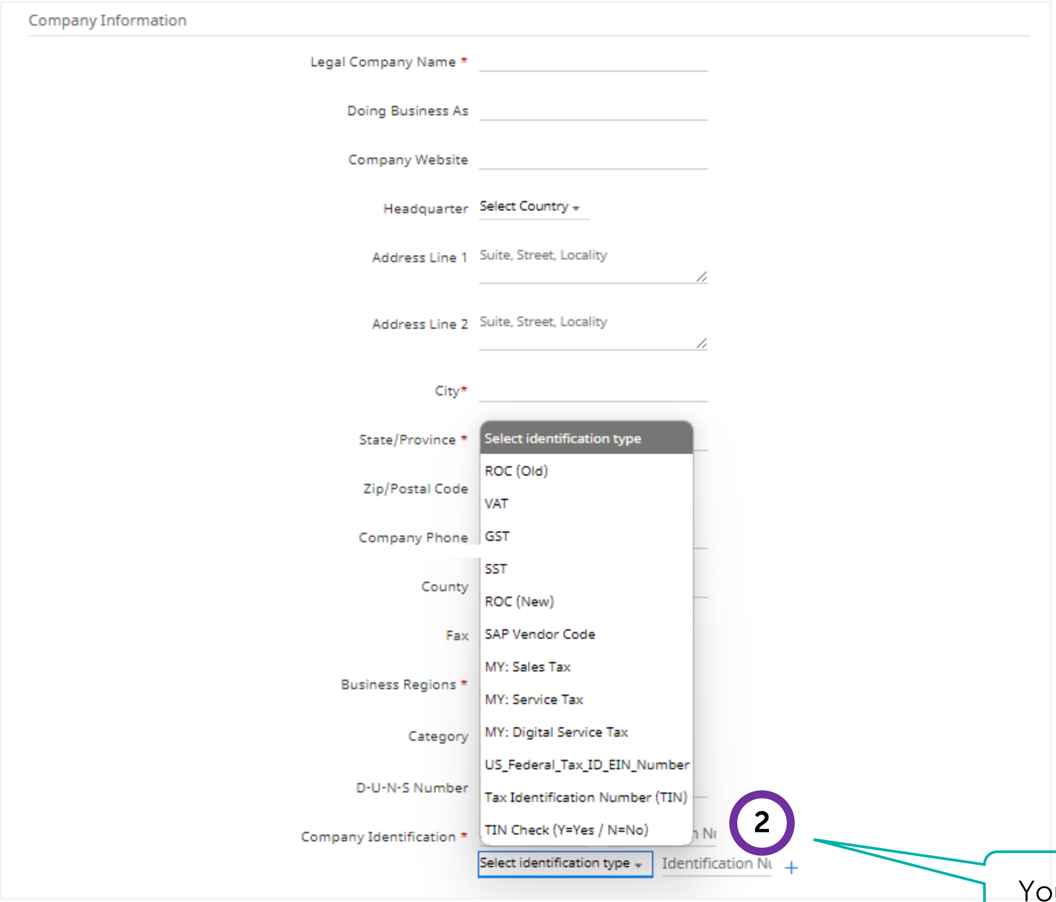




1	To create a **new GEP SMART account**, you are required to setup account credentials in the **Basic Details** section and provide/ validate your company's information details in **Company Information.** Some company information has been populated by PETRONAS buyer/ user during invitation/ PRF creation. Note: The fields marked with asterisk (*) are mandatory.

Create Account (New User)

You may add more Company Identification information such as New-ROC, Tax Identification Number (TIN) etc.



2

You may add additional information here.

2 You may add the info by clicking '+'. Below are the full list of info you may add under Company Identification:

+

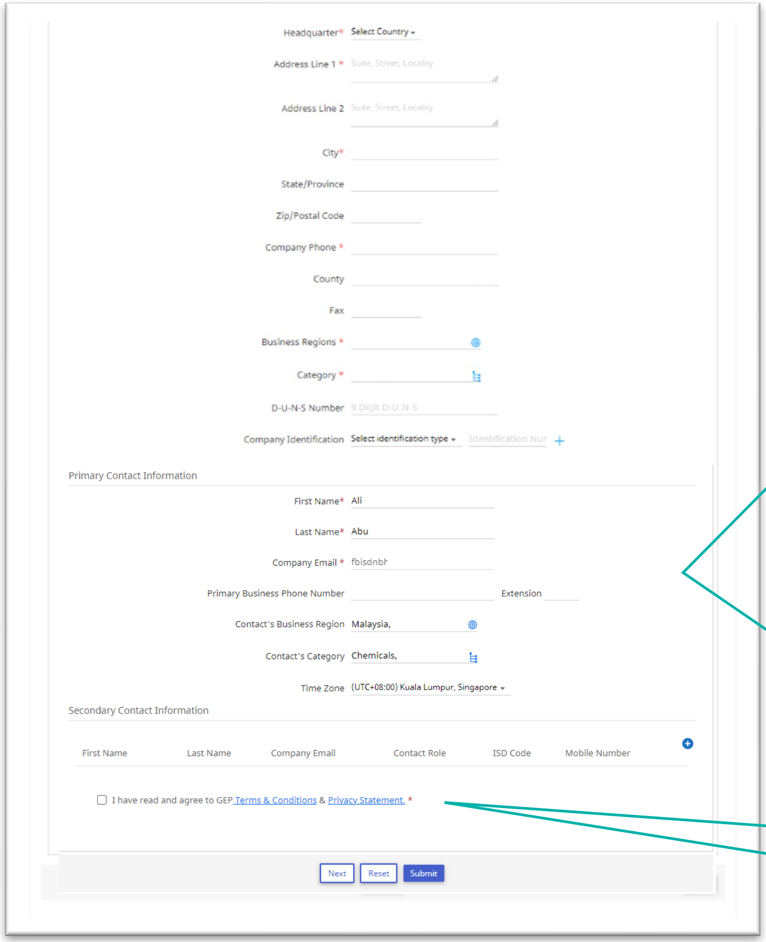
1. VAT
2. GST
3. SST
4. ROC (New)
5. Sales Tax
6. Service Tax
7. Digital Service Tax
8. US Federal Tax ID EIN Number
9. Tax Identification Number (TIN)

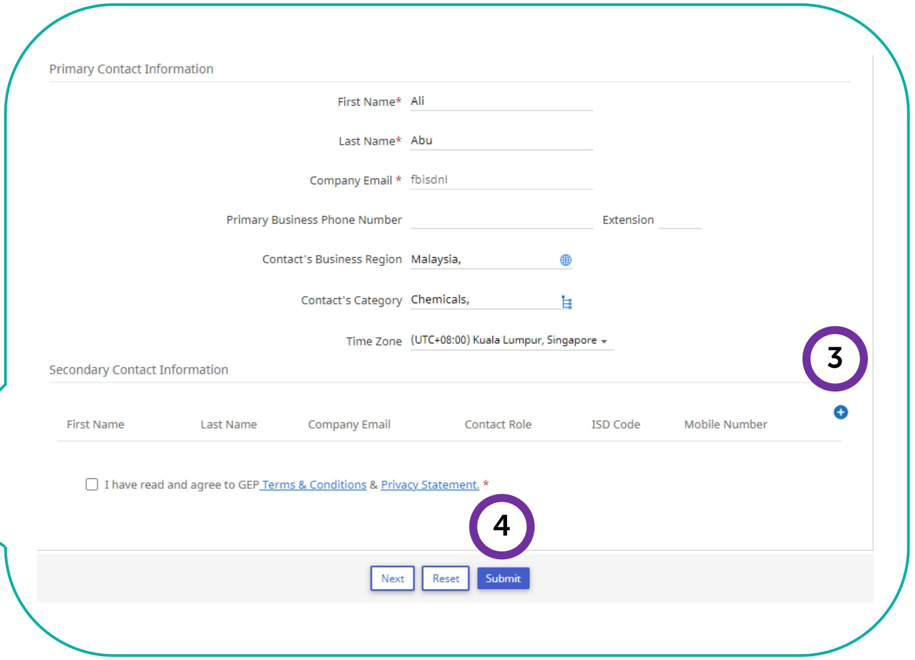
If you fail to enter your New-ROC and TIN, your subsequent transactions with GEP SMART will be impacted such as Invoice processing.

Create Account (New User)

1 Receive PRF — 2 Create Account — 3 Activate Account

Creating new user account with PETRONAS using the same email used to receive the PRF.





I have read and agree to GEP Terms & Conditions & Privacy Statement. *

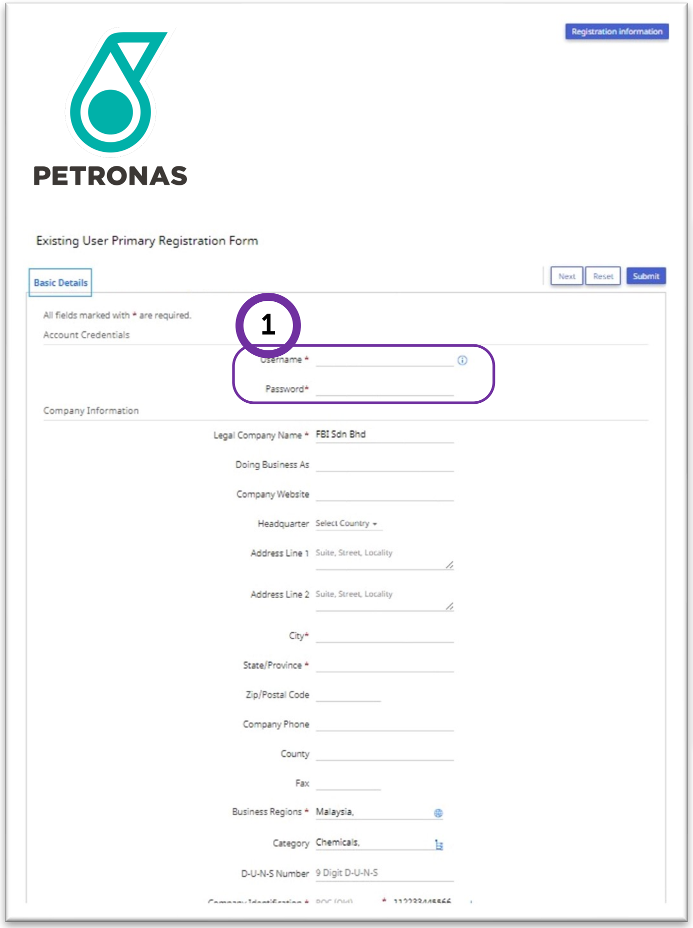
Ensure to tick once details have been filled up

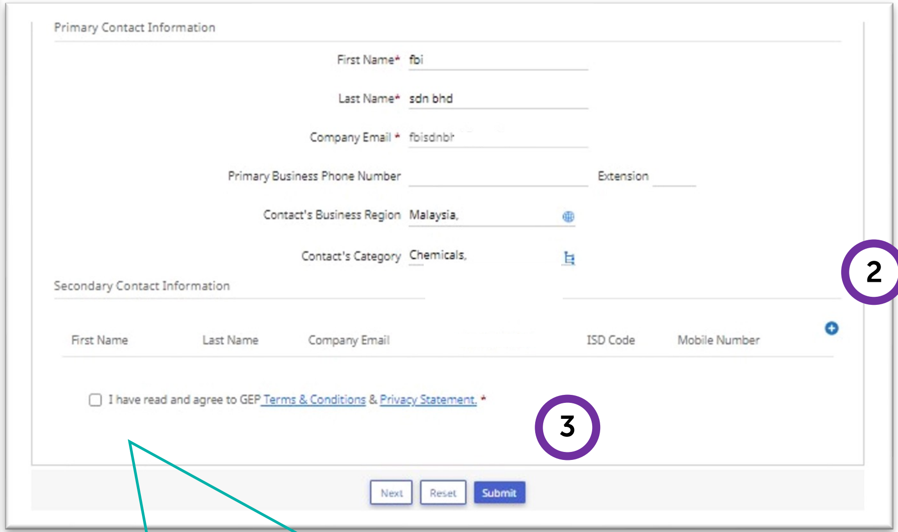
3	You can **grant account access to more users** by clicking on the '+' sign to add secondary contact information.
4	After clicking '**Submit**', your new GEP SMART account will be validated and the GEP SMART account creation process is complete.

Create Account (Existing User)

1 Receive PRF — 2 Create Account — 3 Activate Account

For suppliers with <u>existing</u> GEP SMART account for other companies, they may use the same credential to access.





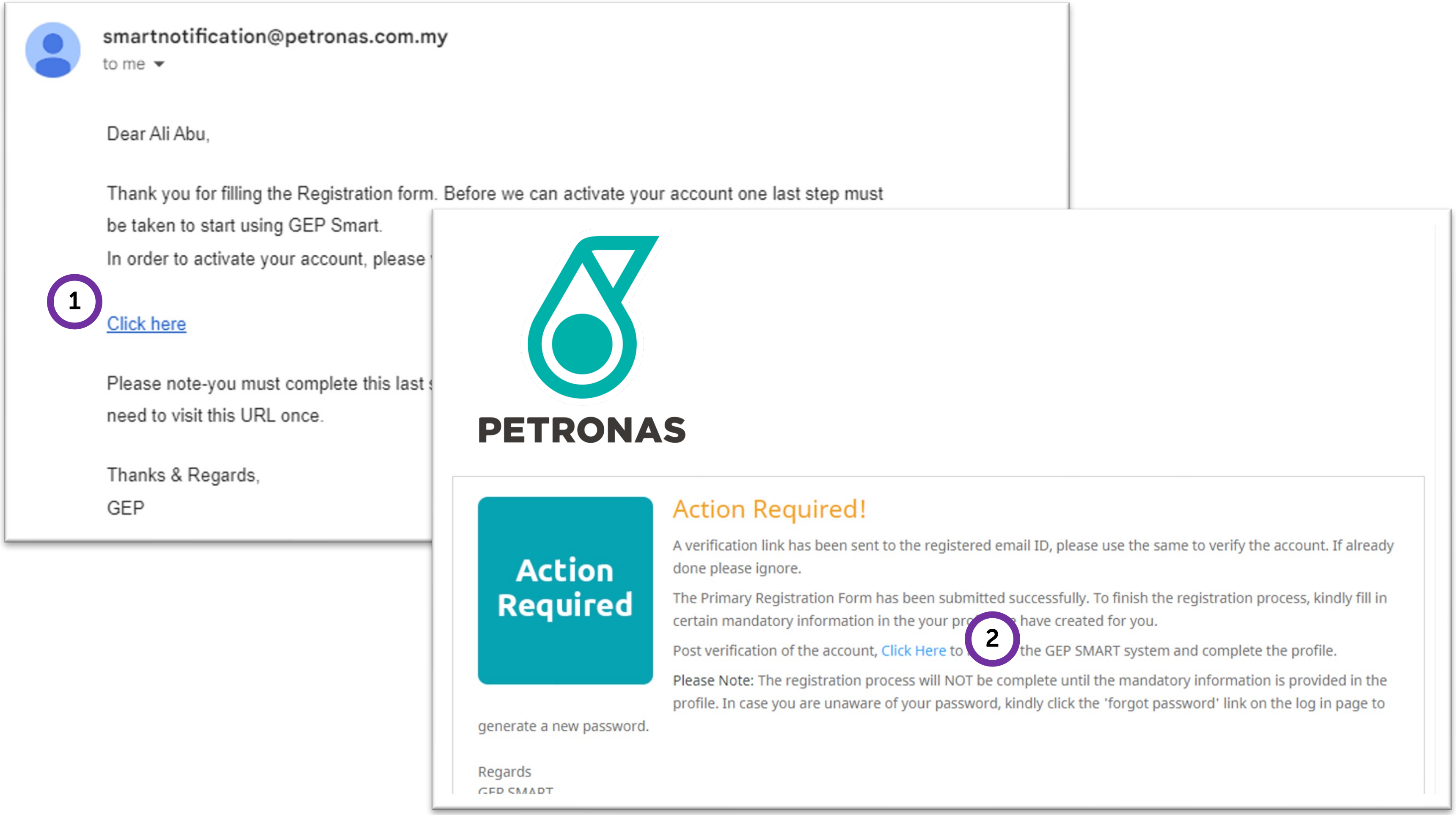
I have read and agree to GEP Terms & Conditions & Privacy Statement. *

Ensure to tick once details have been filled up

1	To use an **existing GEP SMART account**, suppliers are required to: • provide existing account credentials • provide and/or validate the company's registration details Some company information have been populated by PETRONAS buyer/ user during invitation/ PRF creation. Note: The fields marked with asterisk (*) are mandatory.
2	You can **grant account access to more users** by clicking on the '+' sign to add secondary contact information.
3	After clicking '**Submit**', your new GEP SMART account will be validated, and the registration process is complete.

Activate Account

Upon completing the profile creation and registration process, your GEP SMART account is ready to be activated.


smartnotification@petronas.com.my
to me

Dear Ali Abu,

Thank you for filling the Registration form. Before we can activate your account one last step must be taken to start using GEP Smart.
In order to activate your account, please

1 Click here

Please note-you must complete this last
need to visit this URL once.

Thanks & Regards,
GEP

PETRONAS

Action Required

Action Required!

A verification link has been sent to the registered email ID, please use the same to verify the account. If already done please ignore.

The Primary Registration Form has been submitted successfully. To finish the registration process, kindly fill in certain mandatory information in the your pro 2 have created for you.

Post verification of the account, Click Here to the GEP SMART system and complete the profile.

Please Note: The registration process will NOT be complete until the mandatory information is provided in the profile. In case you are unaware of your password, kindly click the 'forgot password' link on the log in page to generate a new password.

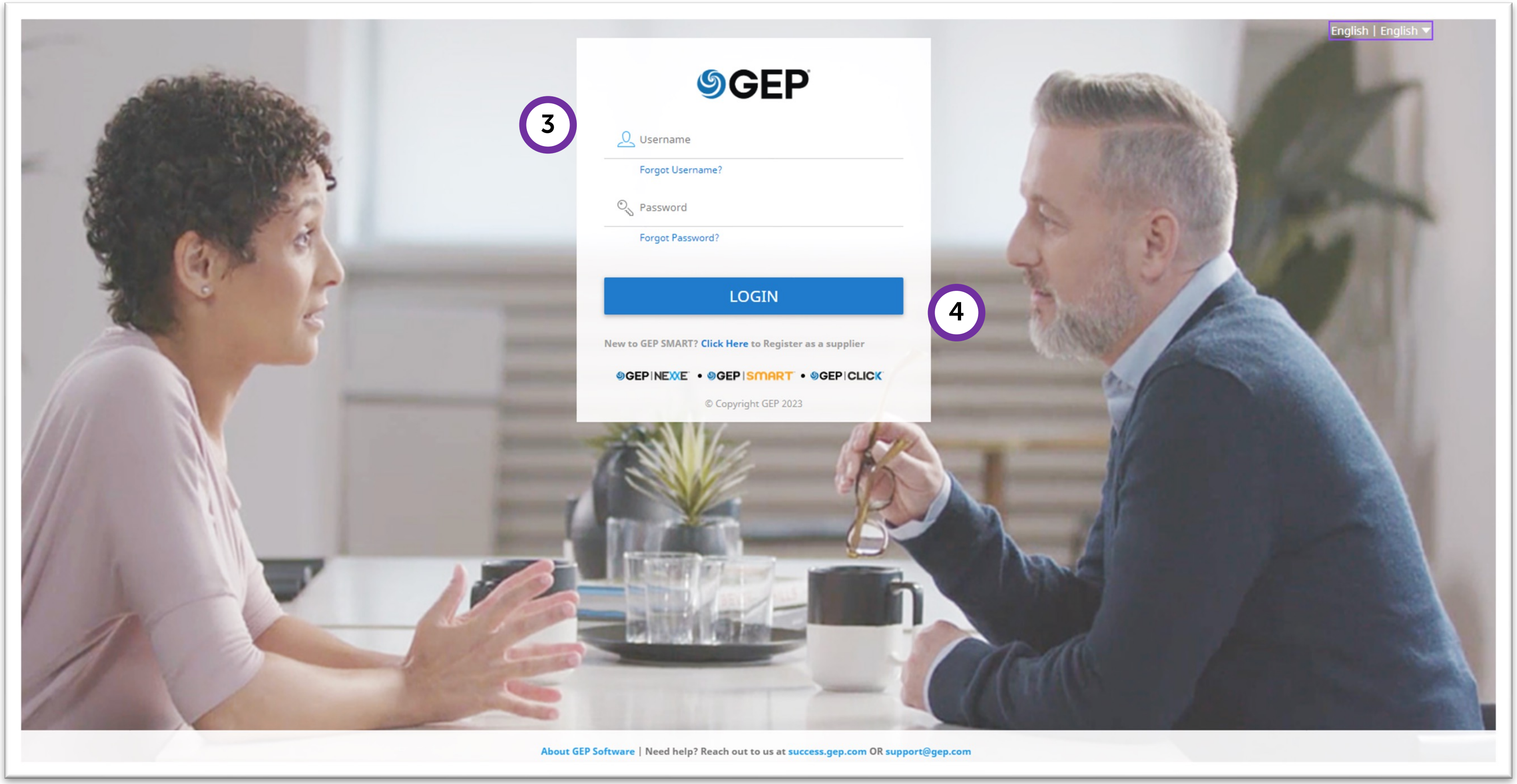
Regards
GEP SMART

1	After account registration, you will receive an **account activation email.** Click on the **link** and system will direct to a reminder page for supplier to complete account details in GEP SMART once login.
2	**Click Here** on the link in the reminder page and supplier will be re-directed to the login page.

Activate Account

1 Receive PRF — 2 Create Account — 3 Activate Account

Upon completing the profile creation and registration process, your GEP SMART account is ready to be activated.

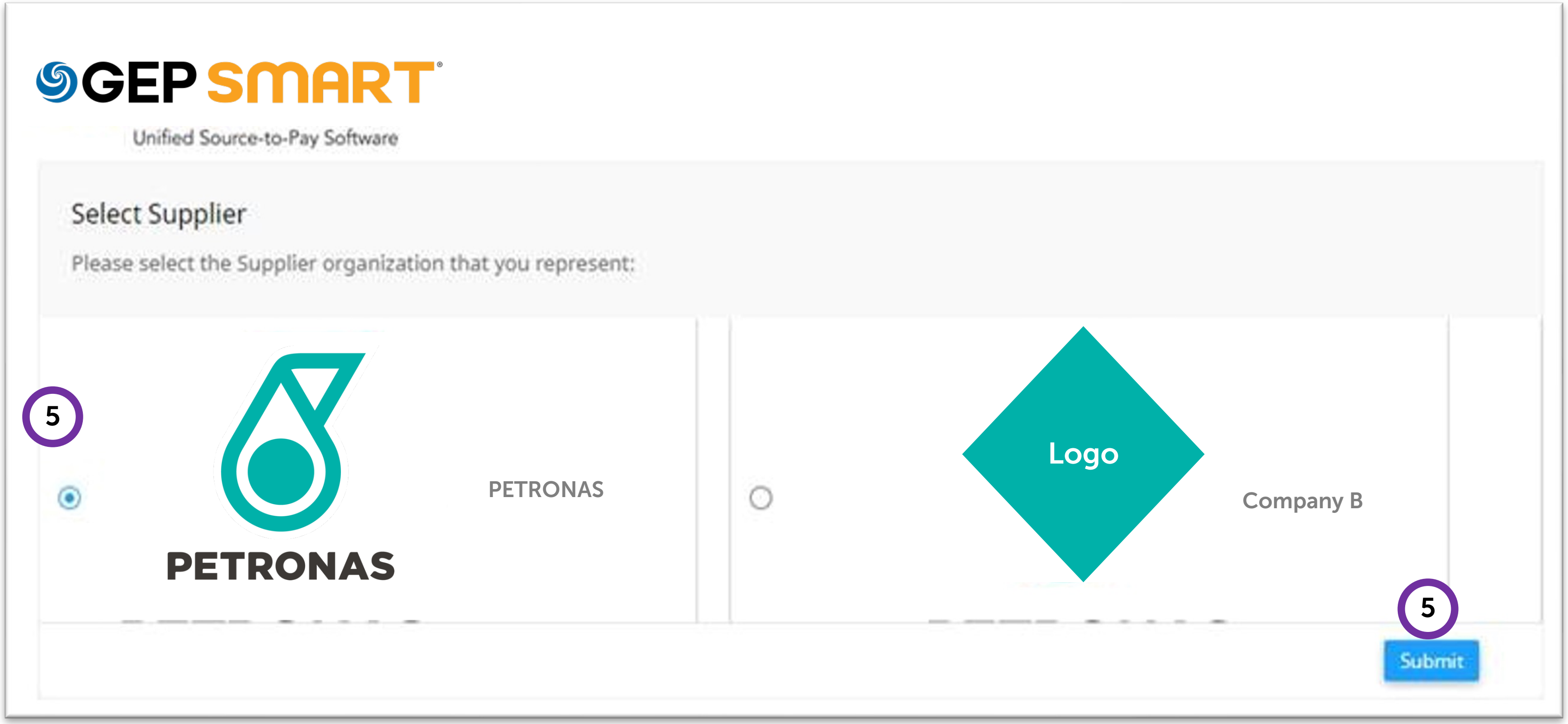


3	Use the **Username** and **Password** created, or existing credential used during the account registration with PETRONAS earlier. Should you forget your username and/or password, click the **'Forgot Username/ Password'** link. A link to reset the password will be sent to your registered email address.
4	Click **'Login'** to start using the GEP SMART system.

Activate Account (Existing User)

1 Receive PRF — 2 Create Account — 3 Activate Account

Suppliers with an <u>existing</u> GEP SMART account with another company need to select PETRONAS to initiate the login page.



5 If your GEP SMART account has access to other companies as well, you will be prompted to select which company you would like to view into.

Select PETRONAS & click Submit.

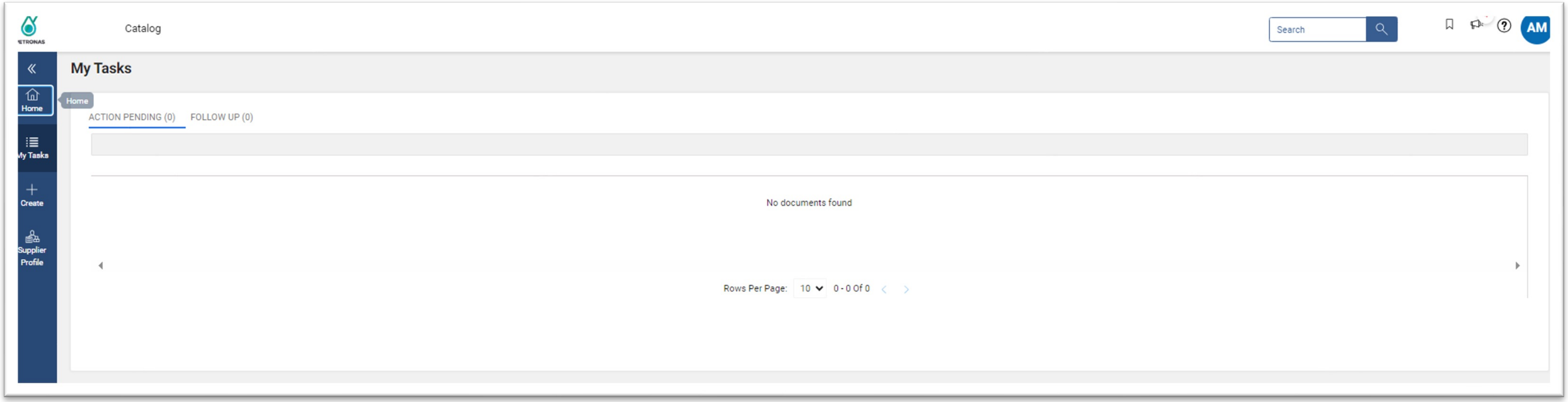
For PETRONAS only account access, you will be directed to the GEP SMART landing page upon login.

Activate Account

1 Receive PRF — 2 Create Account — 3 Activate Account

Upon successful login, the GEP SMART user home page will appear.

New profile will have no activity in Action Pending and Follow Up.



Application Deep Dive

Supplier Profile Approval & Update

Upon login into GEP SMART, new suppliers are required to complete and submit their Supplier Profile for approval by PETRONAS to be eligible for RFx Award and to receive Purchase Order via the system.

For existing PETRONAS suppliers, the Supplier Profile is marked as Approved and able to be updated by creating Supplier Profile Change Request before submit for review & approval.

Learning Objectives

Suppliers will be able to complete and submit their Supplier Profile for approval, as well as update it when needed.

1. Complete Supplier Profile
2. Submit For Approval
3. Update Supplier Profile

Mandatory Requirements for Supplier Profile Approval or Change Request

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

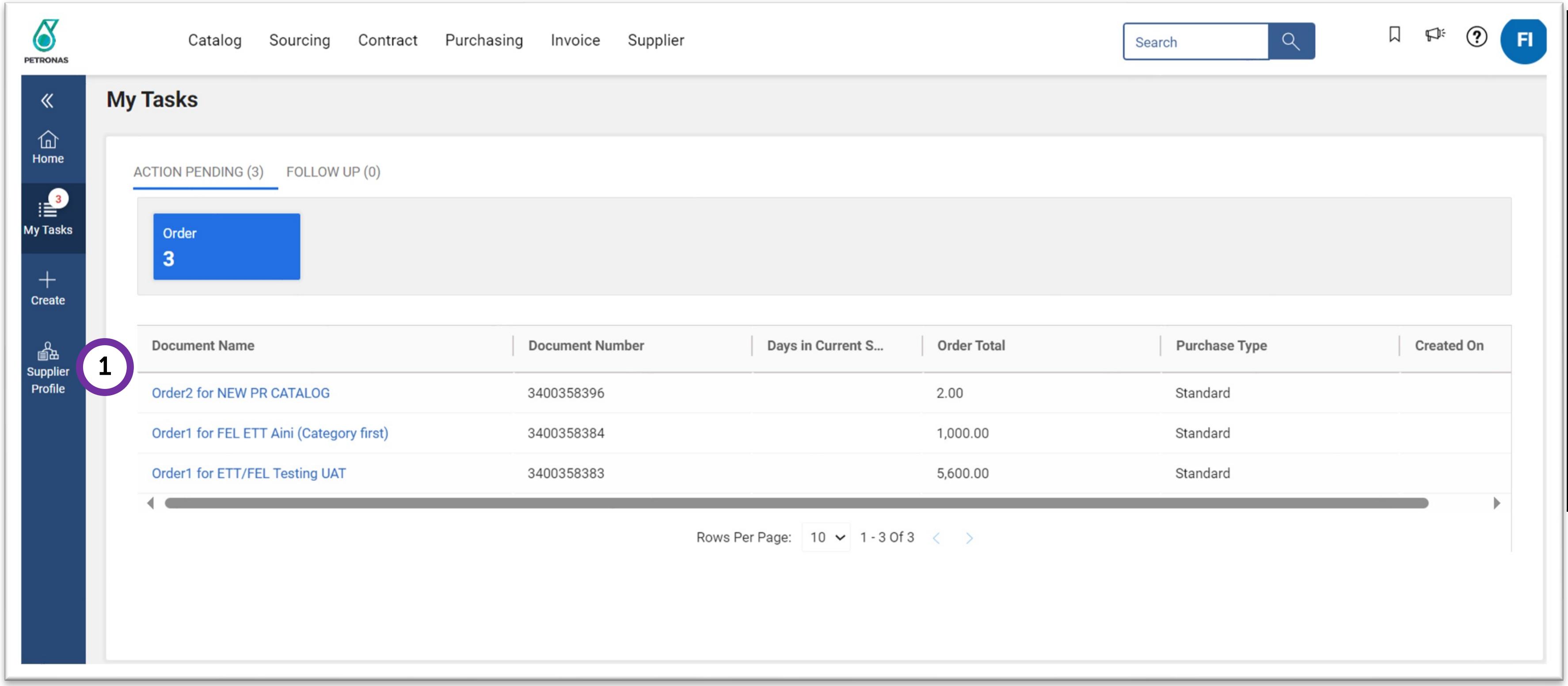
Mandatory Sections	PETRONAS Licensed or Registered Suppliers	Non-PETRONAS Licensed or Registered Suppliers
Basic Details	No action required. Mandatory fields (i.e., Supplier's Legal Name and Region) are auto populated from account registration process.	
Identification Information	No action required. Mandatory field (i.e., ROC/company registration number) are auto populated from account registration process.	
Location Information	1. Headquarter (HQ) Address 2. At least (1) Ordering Location address to represent branch office (can be the same with HQ address) 3. Remit to Location as banking information for payment purposes.	
Certificates	1. Company Incorporation Certificate (SSM) 2. Bank Statement Header 3. Tax Identification Number (TIN) Supporting Document	
Marketing Information	Supported Currencies	

The above information mentioned are mandatory information required for the submission of supplier profile or Change Request update. However, suppliers are still allowed to maintain the remaining information in supplier profile.

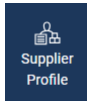
Complete Supplier Profile (New Supplier)

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

For new suppliers, the Supplier Profile can be completed at any time but must be updated to be eligible for RFx awards and to receive Purchase Orders.



1 To complete your profile, click on the **'Supplier Profile'** button.



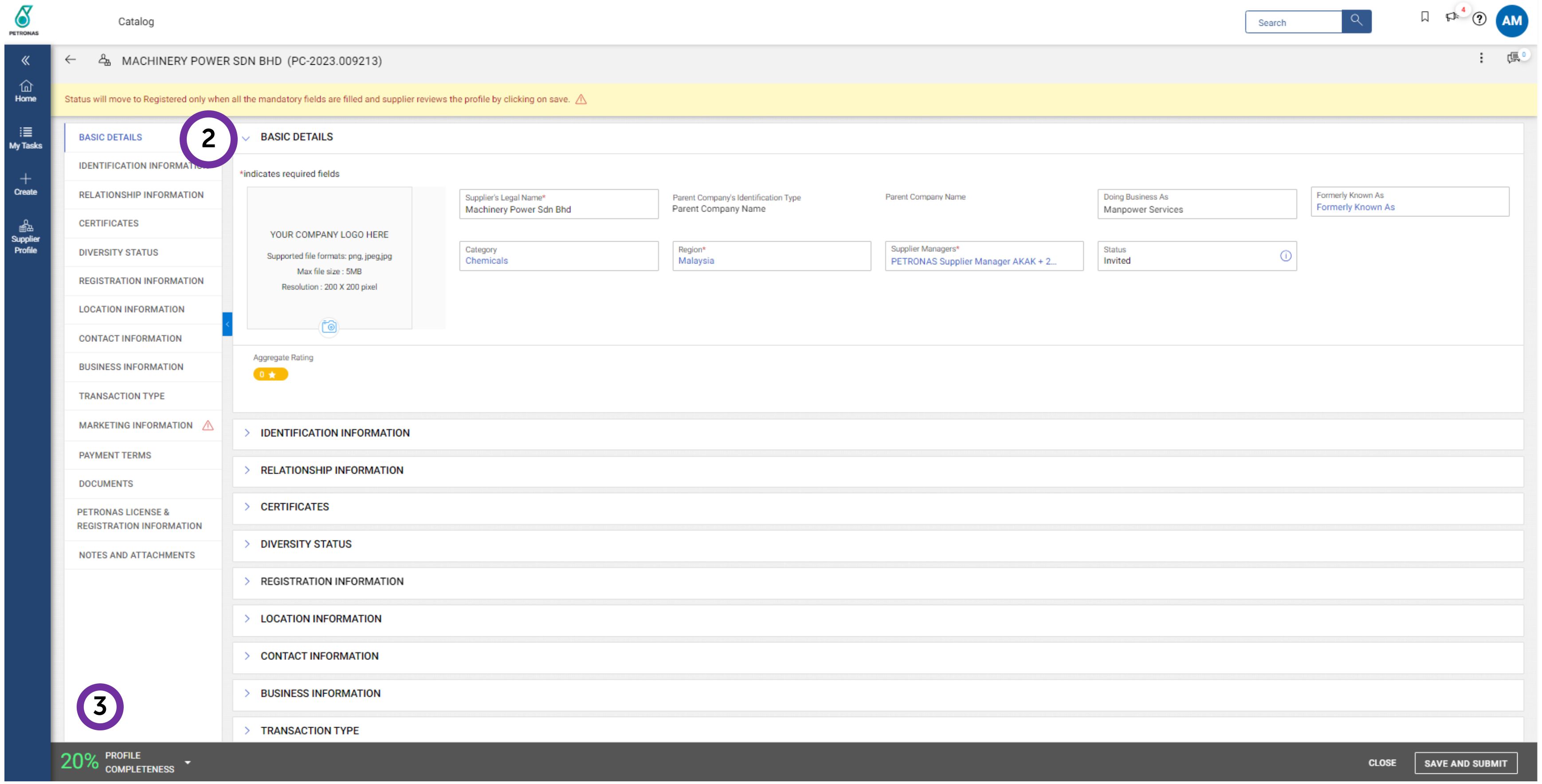
Note:

- Some information in the supplier profile have been pre-populated. Supplier is required to review and complete other required information.
- Mandatory fields have been populated during account creation/ registration.

Complete Supplier Profile

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

The Supplier Profile is separated by sections and supplier is required to ensure all mandatory information has been filled up prior to submit profile for approval by PETRONAS.



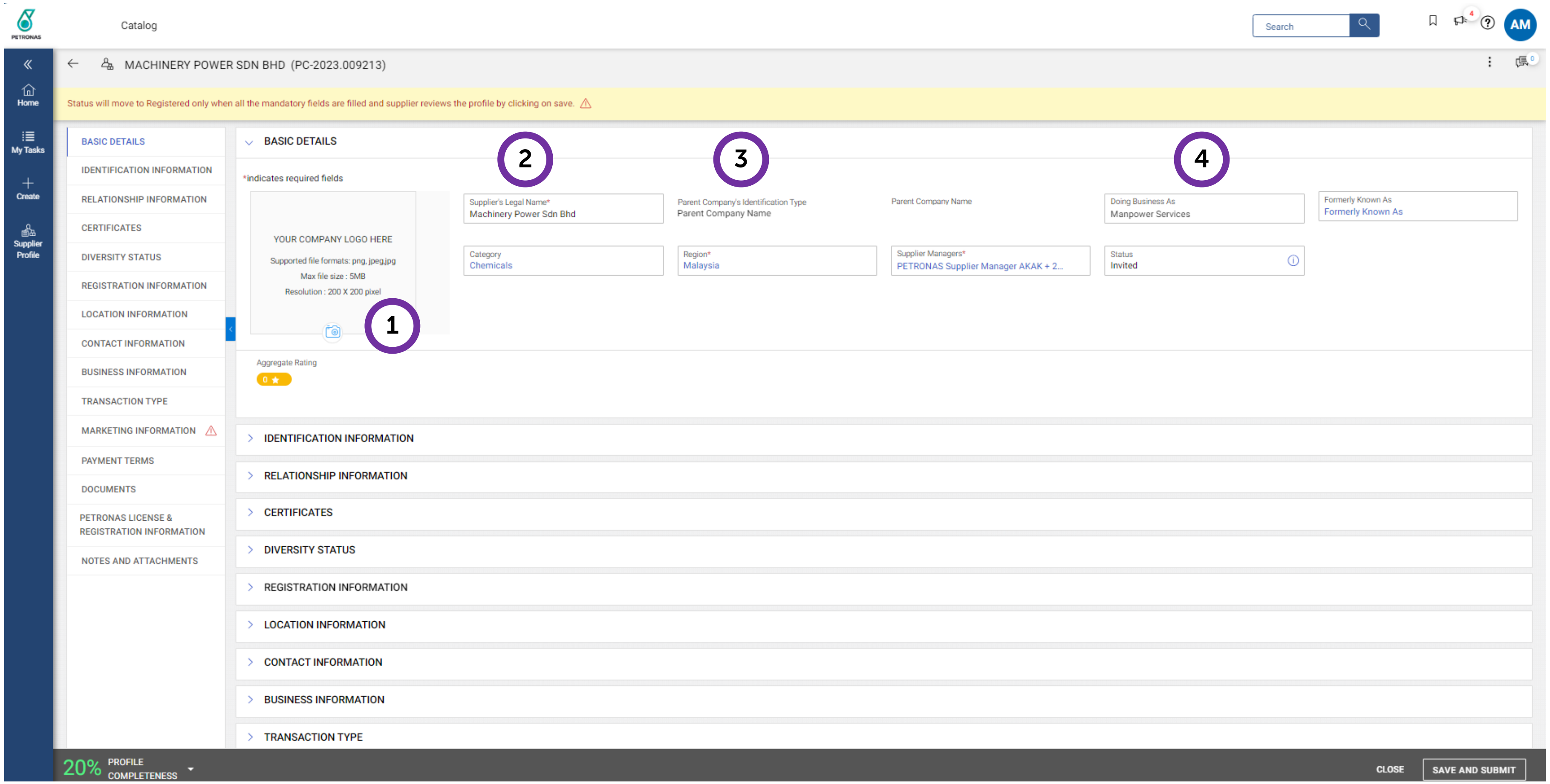
2	For PETRONAS Licensed or Registered supplier, some fields are locked, and no changes are allowed. Any changes to the following need to be made in PETRONAS License Management System (PLMS): • Supplier's Legal Name • Category • PETRONAS License & Registration (Section)
3	The completion rate to the supplier profile can be tracked here.

For existing PETRONAS suppliers with GEP SMART access, you are required to ensure your **Supplier Profile is always with Approved Status,** and you're good to go!

Basic Details

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier is required to provide the <u>Basic Details</u> of your company such as company name, category, region etc.

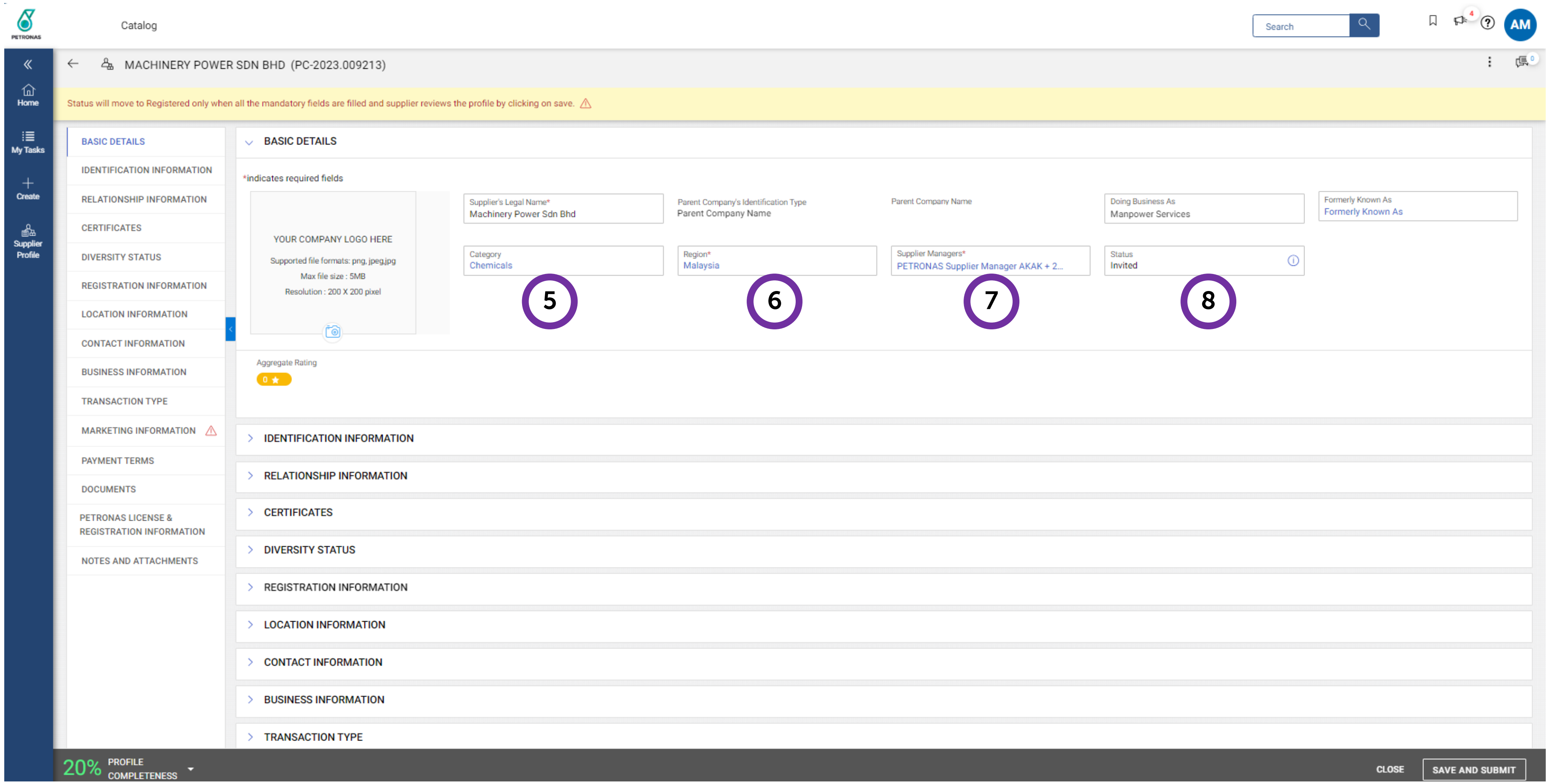


1	Click here to upload your **company logo.**
2	'**Supplier's Legal Name**' is referring to your company name as per registered with respective country registration bodies/agencies. e.g., Suruhanjaya Syarikat Malaysia. The Supplier's Legal Name will be referred to across contract documents in SMART e.g., RFx, Contract, PO, Invoice.
3	'**Parent Company's Identification**' type and Parent Company Name can be used if your parent company is available in SMART and to be used to link both these profiles for PETRONAS reference.
4	'**Doing Business As**' is referred to your famously known as name.

Basic Details

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier is required to provide the <u>Basic Details</u> of your company such as company name, category, region etc.



5	'**Category**' is referred to your products/services offerings. This information is only editable by the Buyer. For PETRONAS License/Registered Suppliers, the category will be mapped against your active SWEC from PLMS.
6	'**Region**' is referred to where supplier can provide their service. E.g., if Malaysia & Indonesia is selected, supplier can provide service in Malaysia & Indonesia.
7	'**Supplier Manager**' refers to the PETRONAS internal team that is responsible in managing the supplier profile.
8	'**Status**' refers to your supplier profile status. Kindly refer to next page for the detail of each of the statuses.

Supplier Profile Status Definitions

1 — Complete Supplier Profile
2 — Submit For Approval
3 — Update Supplier Profile

1. **Invited**: This status denotes that the supplier has been invited to register with GEP SMART by the buyer user. In case the status of the supplier was set as Identified, it will be changed to Invited when a buyer invites the supplier contacts by sending them the Primary Registration Form (PRF) or by inviting them to participate in RFx.

2. **Registered**: This status denotes that the supplier contact has registered with GEP SMART. Status of the supplier profile will change automatically once the 'Save' button is clicked after all the supplier mandatory fields have been filled by the Supplier.

3. **Approved**: This status denotes that the supplier profile has been approved by the approvers and it is now available for consumption. Status will be changed by the system from Registered to Approved upon approval from the approver.

4. **Rejected**: This status denotes that the supplier profile was rejected by the approver. Status will be changed by the system Registered to Rejected upon rejection from the approver.

5. **Non-Compliant**: System can change the status to "Non-Compliant" if it identifies that a certain type of certificate has expired or the PETRONAS License/Registration in PLMS is non-compliant. This is a configurable feature. Upon uploading a new certificate with the new valid dates, the system can revert the status back to the previous status.

6. **Inactive**: This is a status that needs to be manually selected by the Supplier Manager to make the supplier Inactive or the PETRONAS License/Registration in PLMS has expired i.e. Inactive.

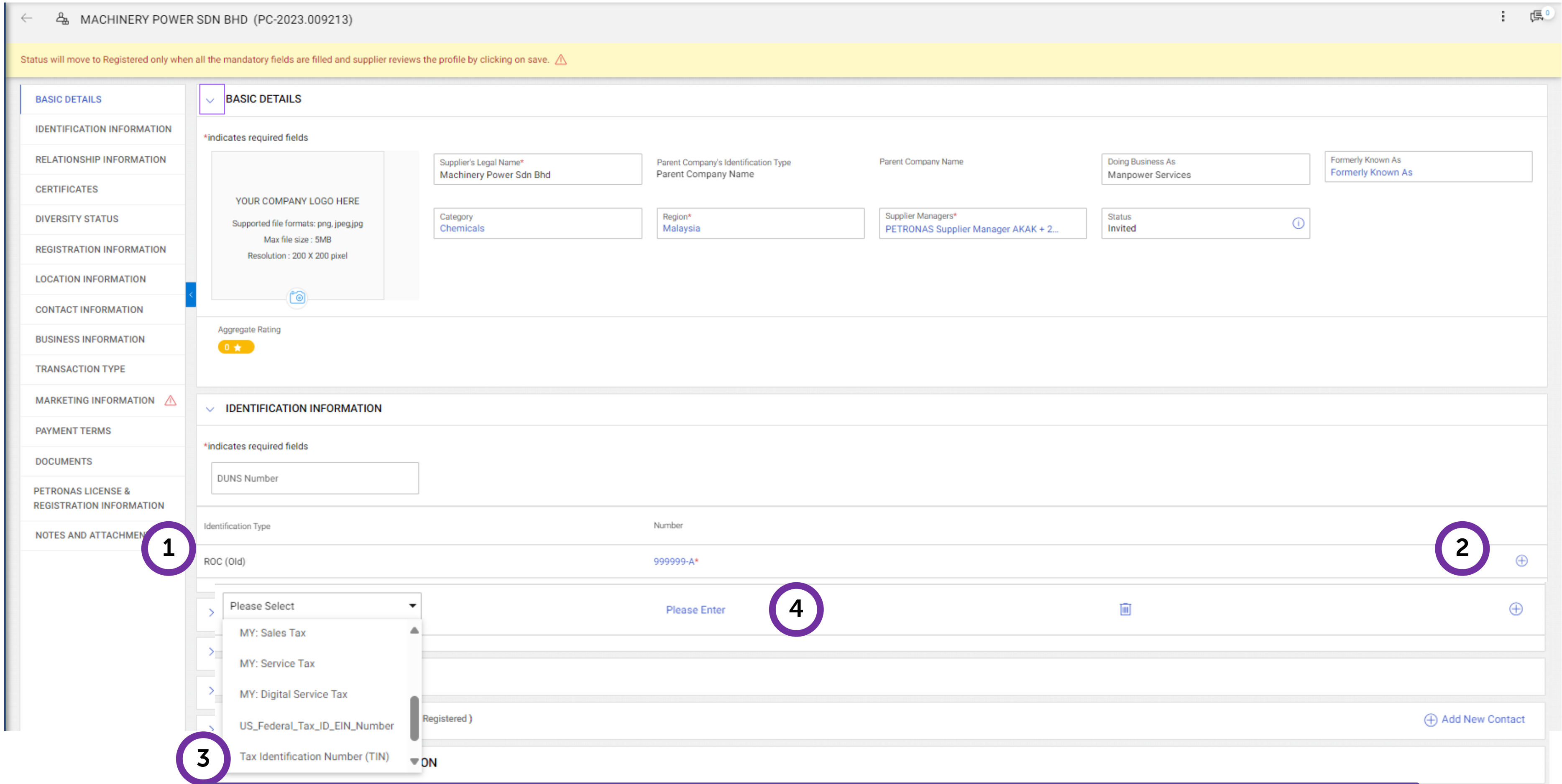
7. **Suspended**: This is a status that needs to be manually selected by the Supplier Manager to make the supplier Inactive.

8. **Blacklisted**: This is a status that needs to be manually selected by the Supplier Manager to make the supplier Inactive.

Identification Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier is required to provide <u>Identification Information</u> of your company such as company registration number and tax number.



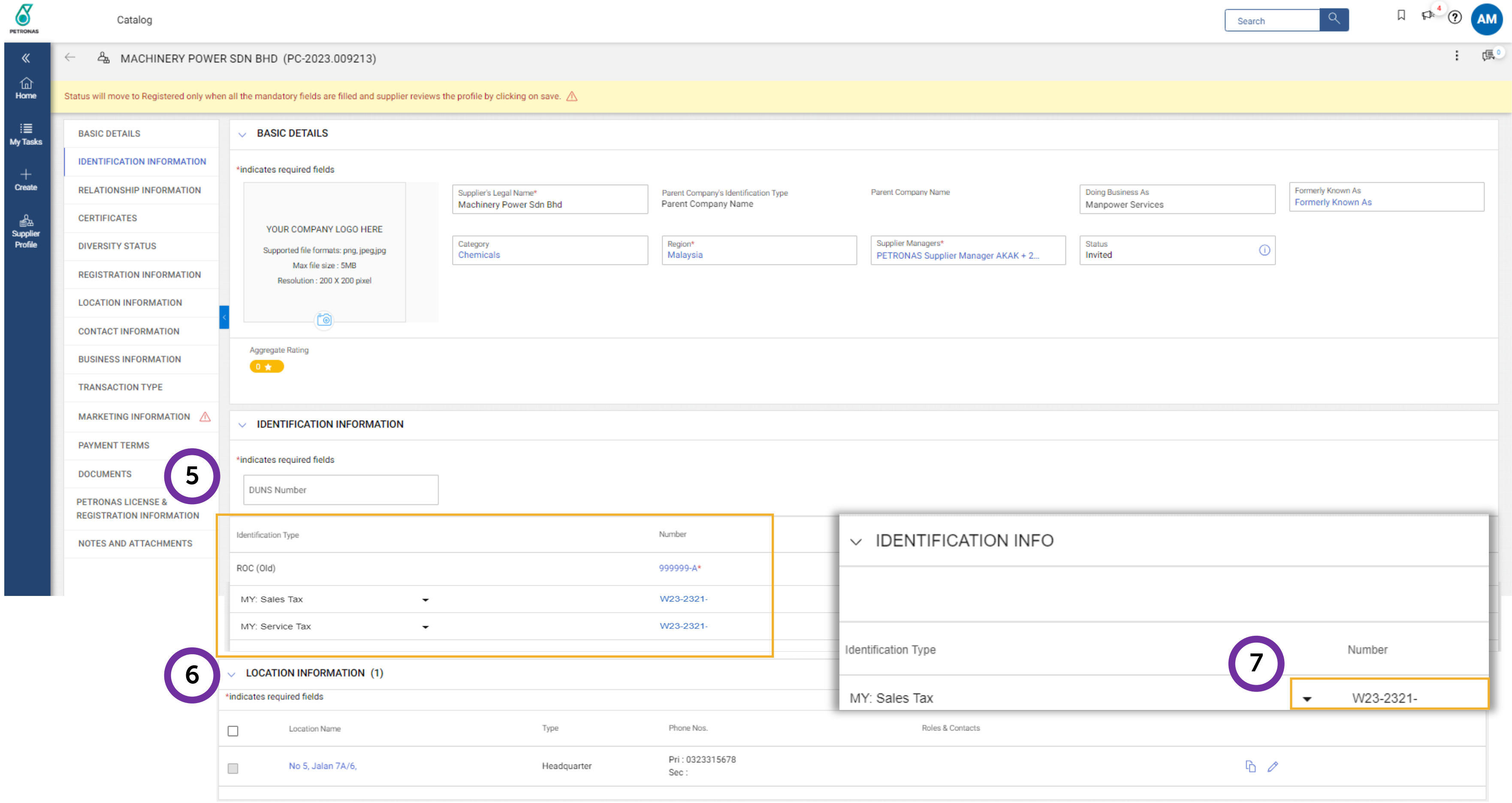
1	The Registration of Company (ROC) is auto-populated as per GEP SMART account creation.
2	Click the '+' sign and choose from the drop- down to add the relevant identification type.
3	For Malaysia incorporated companies, kindly select ROC (New) and Tax Identification Number (TIN). Please add in new line for each.
4	Enter the identification number.

You may also include other relevant information VAT, GST, SST, Sales Tax, Service Tax, or Digital Service Tax etc. where applicable.

Identification Information

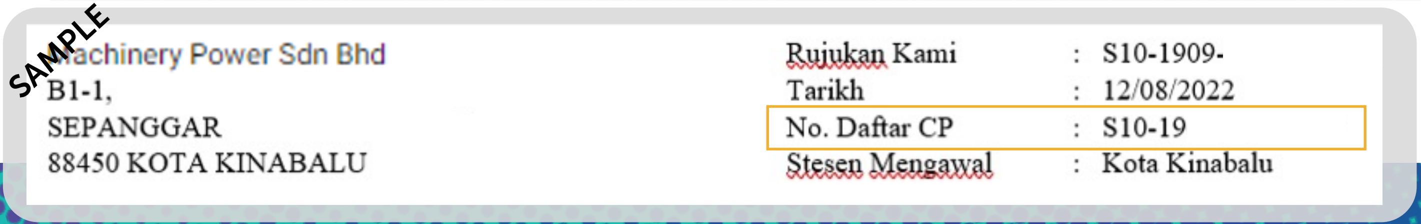
1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Optional where applicable: Sales Tax, Service Tax, or Digital Service Tax



5	You may add the Sales Tax, Service Tax, or Digital Service Tax in Identification Information section.
6	Once added, Sales Tax, Service Tax and Digital Service Tax needs to be extended in Location Information for Ordering Locations.
7	Supplier to select the relevant Sales Tax, Service Tax or Digital Service Tax from the drop-down option in the Ordering Locations.

No. Daftar CP in the "SURAT KELULUSAN PENDAFTARAN" from Royal Malaysian Customs Department represents your Tax registration number


SAMPLE

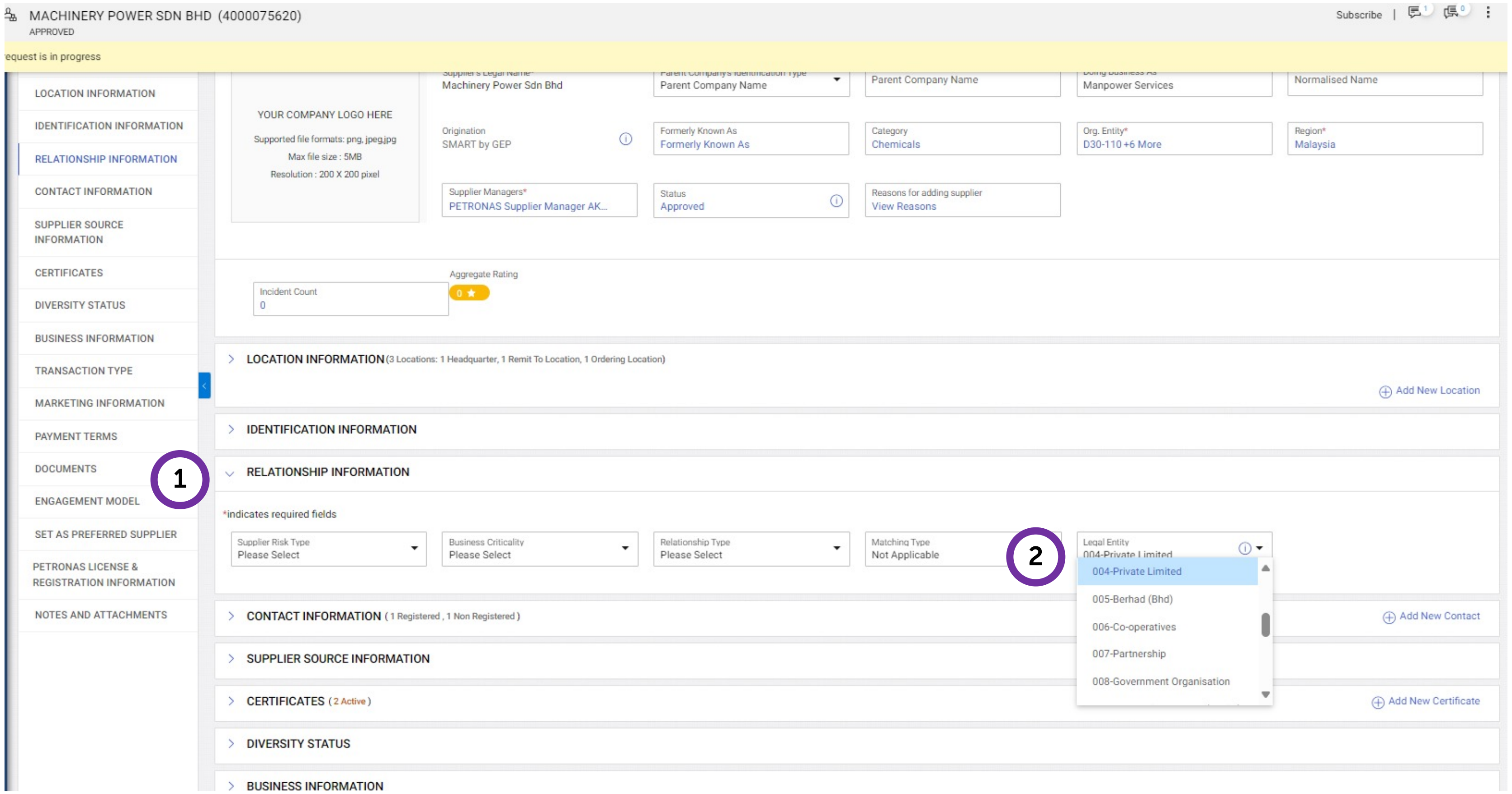
Machinery Power Sdn Bhd
B1-1,
SEPANGGAR
88450 KOTA KINABALU

Rujukan Kami	:	S10-1909-
Tarikh	:	12/08/2022
No. Daftar CP	:	S10-19
Stesen Mengawal	:	Kota Kinabalu

Relationship Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

For Malaysia incorporated companies, you are required to provide the Legal Entity of your company.

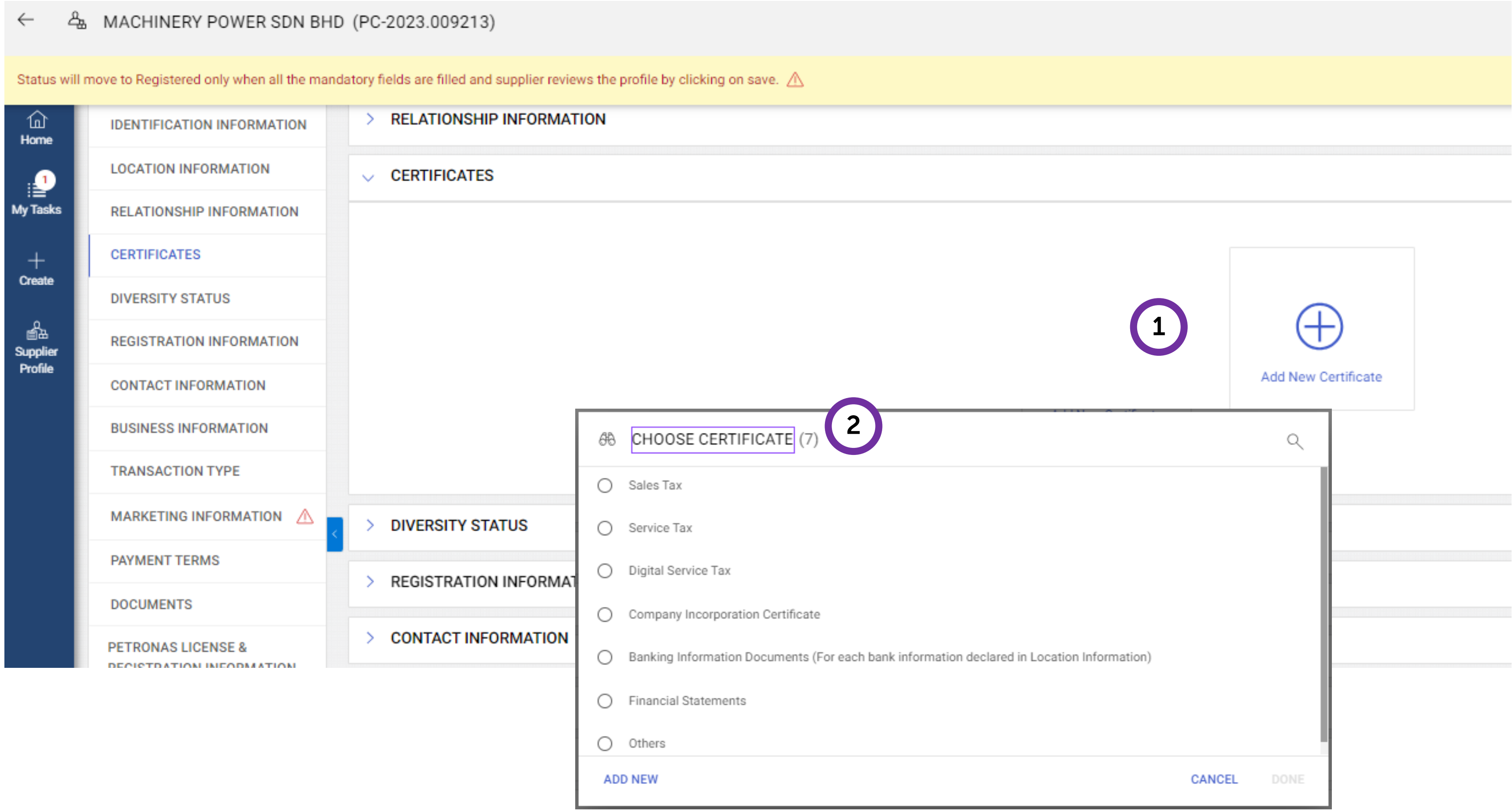


1	Add your Legal Entity under Relationship Information tab.
2	Select your Legal Entity from the drop-down list: 001 – MyKad 002 – Passport 003 – Sole Proprietor 004 – Private Limited/ Sendirian Berhad 005 – Berhad 006 – Co-Operatives 007 – Partnership 008 – Government Organisation/ Agencies 009 – Financial Institution (Banks/ FI Related) 010 – Educational Institution (Schools/ Colleges/ Universities) 011 – Health Institution (Hospitals/ Clinics) 012 – Societies/ Clubs 013 – National Identification Number 014 – Location 015 – Event and Conference 016 – One Time Vendor/ Customer

Certificates

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

Supplier can attach the supporting documents for company incorporation certificate, banking information documents, financial statements.

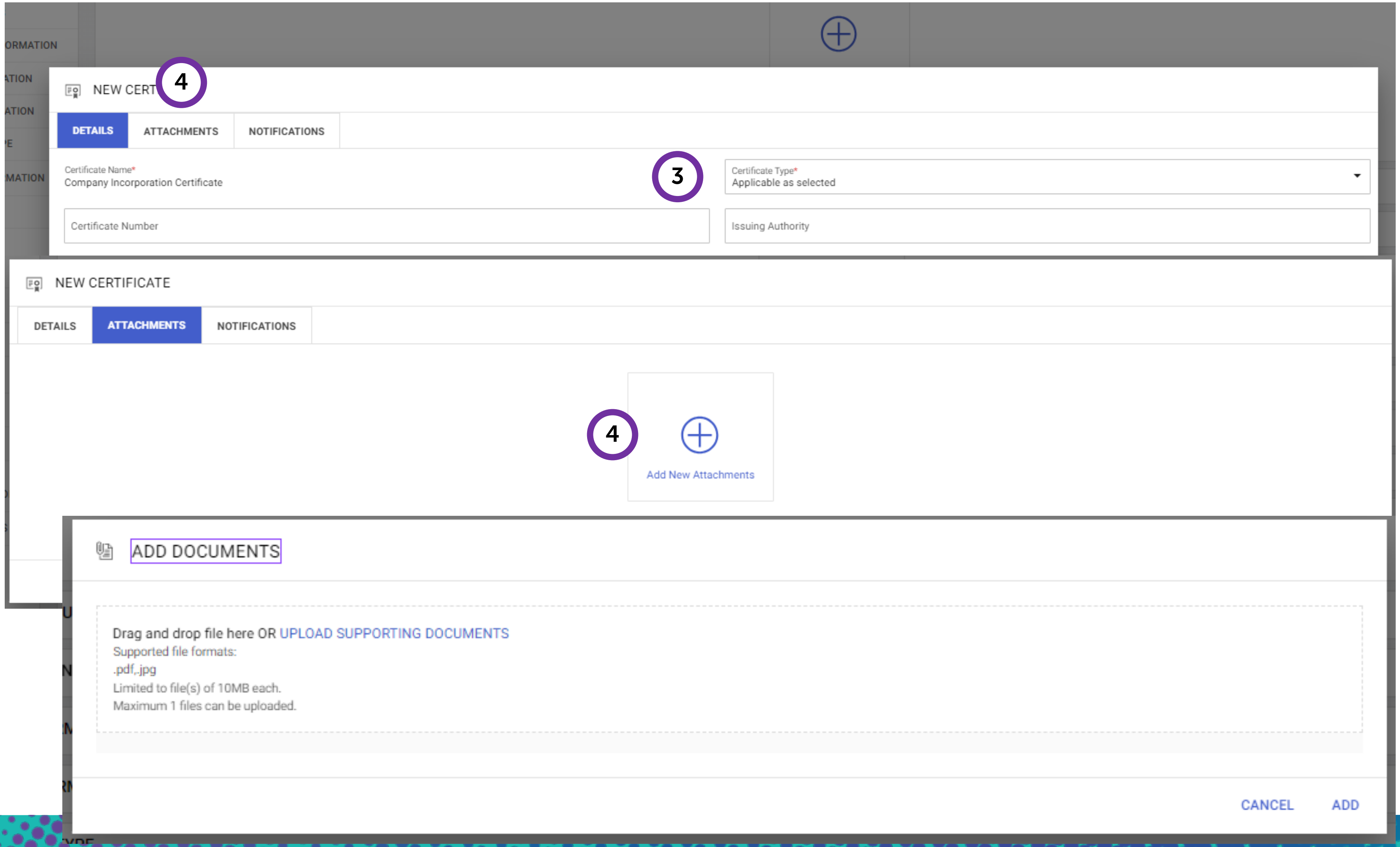


1	Click “Add New Certificate” to attach your certificates. The mandatory certificates are: 1. Company Incorporation Certificate. 2. Bank Statement Header 3. Tax Identification Number Supporting Document The optional certificates are: 1. Sales Tax 2. Service Tax 3. Digital Service Tax To attach the document, click on the **‘Add New Certificate’** button.
2	A popup will appear. Select the relevant supporting document type and click ‘Done’.

Certificates

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier can attach the supporting documents for company incorporation certificate, banking information documents, financial statements.

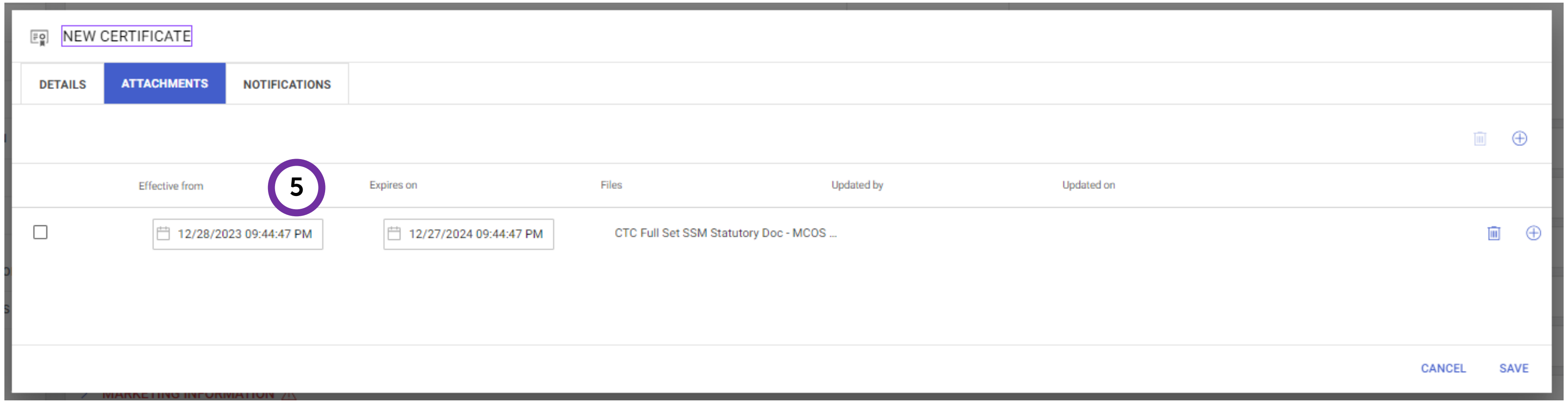


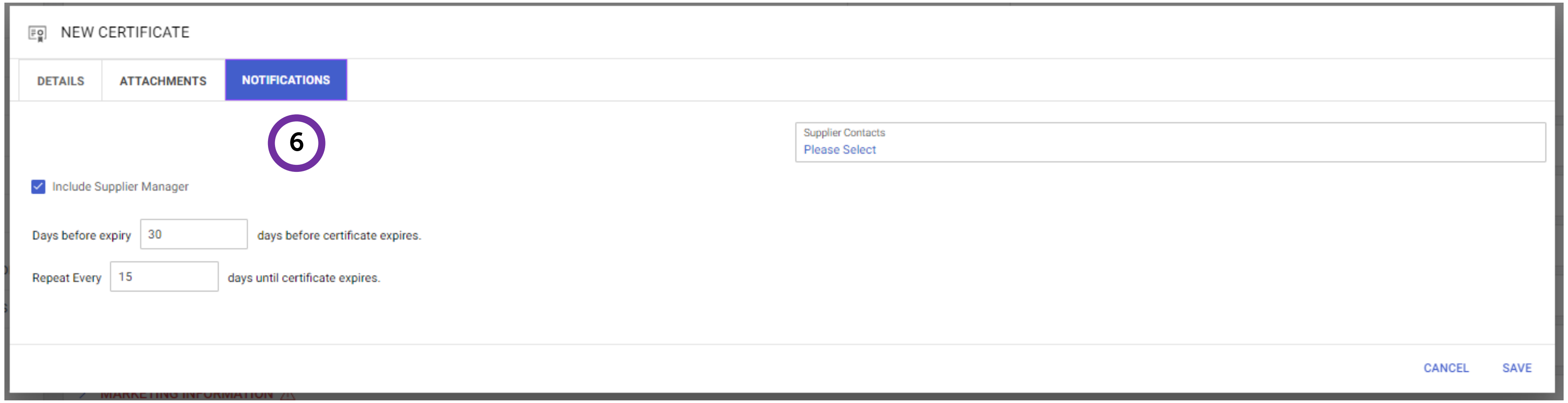
3	Under '**Certificate Type**', retain as 'Applicable as selected. Enter the '**Certificate Number**' and '**Issuing Authority**'.
4	Under **Attachments** tab, click on '**Add New Attachment**' and upload the supporting document. Once done, click on '**Add**'.

Certificates

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier can attach the supporting documents for company incorporation certificate, banking information documents, financial statements.





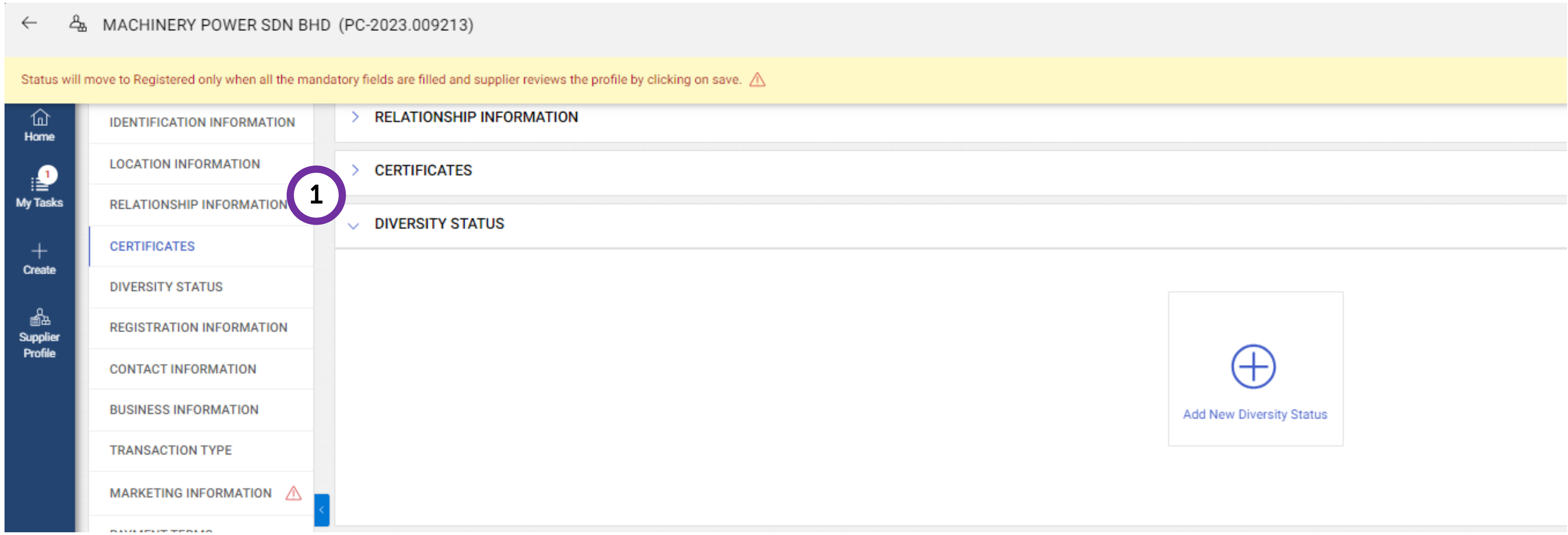
5	Once document has been successfully uploaded, supplier will need to insert the validity of the certificate. Insert **Effective From** and **Expires on** date. Note: For certificate that has no expiry, please input the longest period possible. Supplier may also set a reminder to update the validity period or re-attach new certificate under '**Notification**' tab.
6	Supplier shall set the period when notification should be sent and the frequency of the reminder. Once set, select the **Supplier Contact** who shall receive the reminder notification before click '**Save**'

It is important that supplier to update certificate prior expiry to avoid profile automatically changed to **Non-Compliant**.

Diversity Status

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

This section is not required to be filled by supplier.

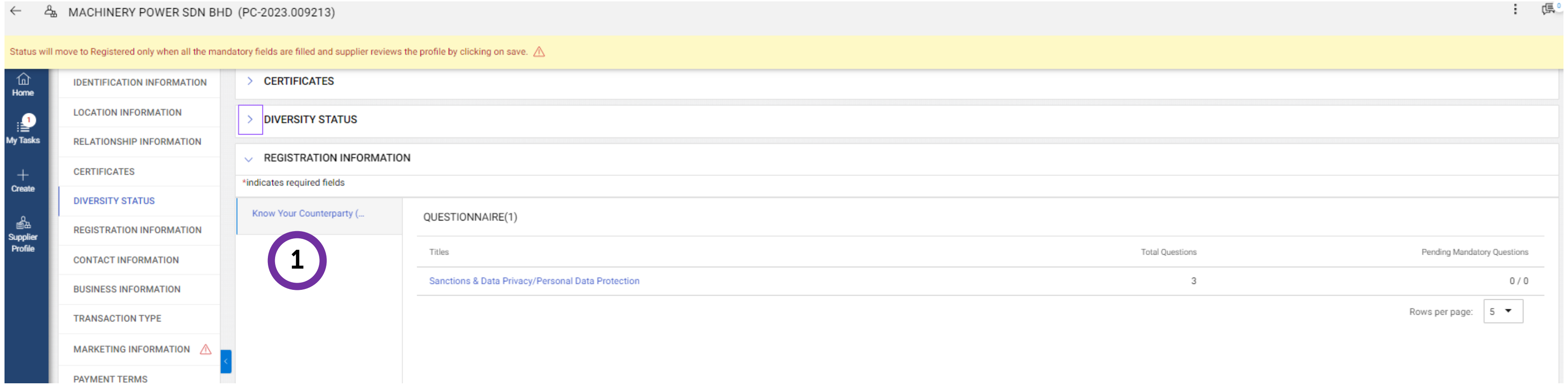


1	Kindly **DO NOT** make any changes to this section.

Registration Information

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

Supplier may view the Primary Registration Form (PRF) that was submitted during the account creation process.

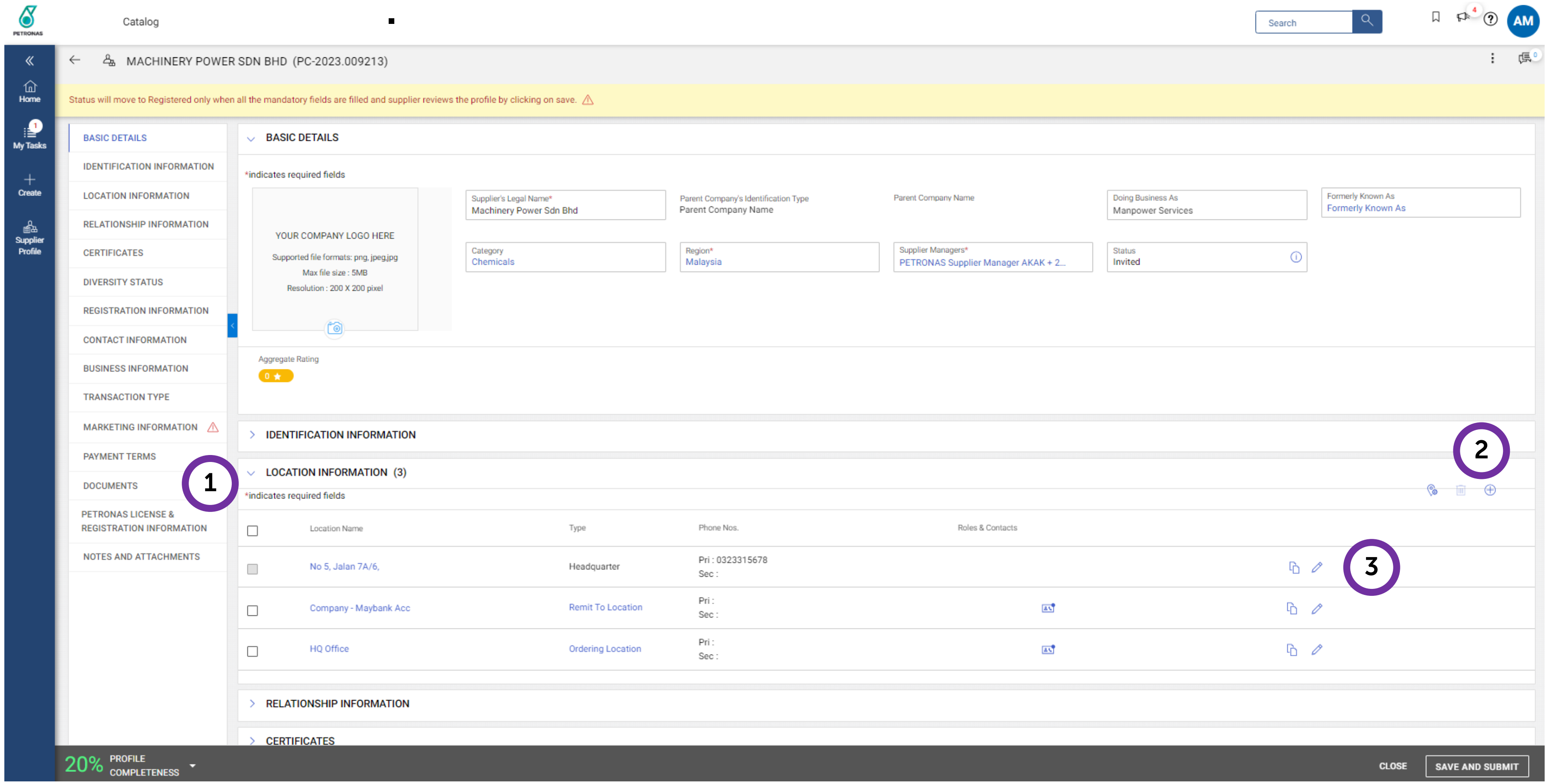


1	Click on '**Registration Information**' to view the Primary Registration Form that was submitted during the account creation process.

Location Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Location Information records your Headquarter, Ordering Location and Remit to Location. This information is required to receive PO and payment in GEP SMART.

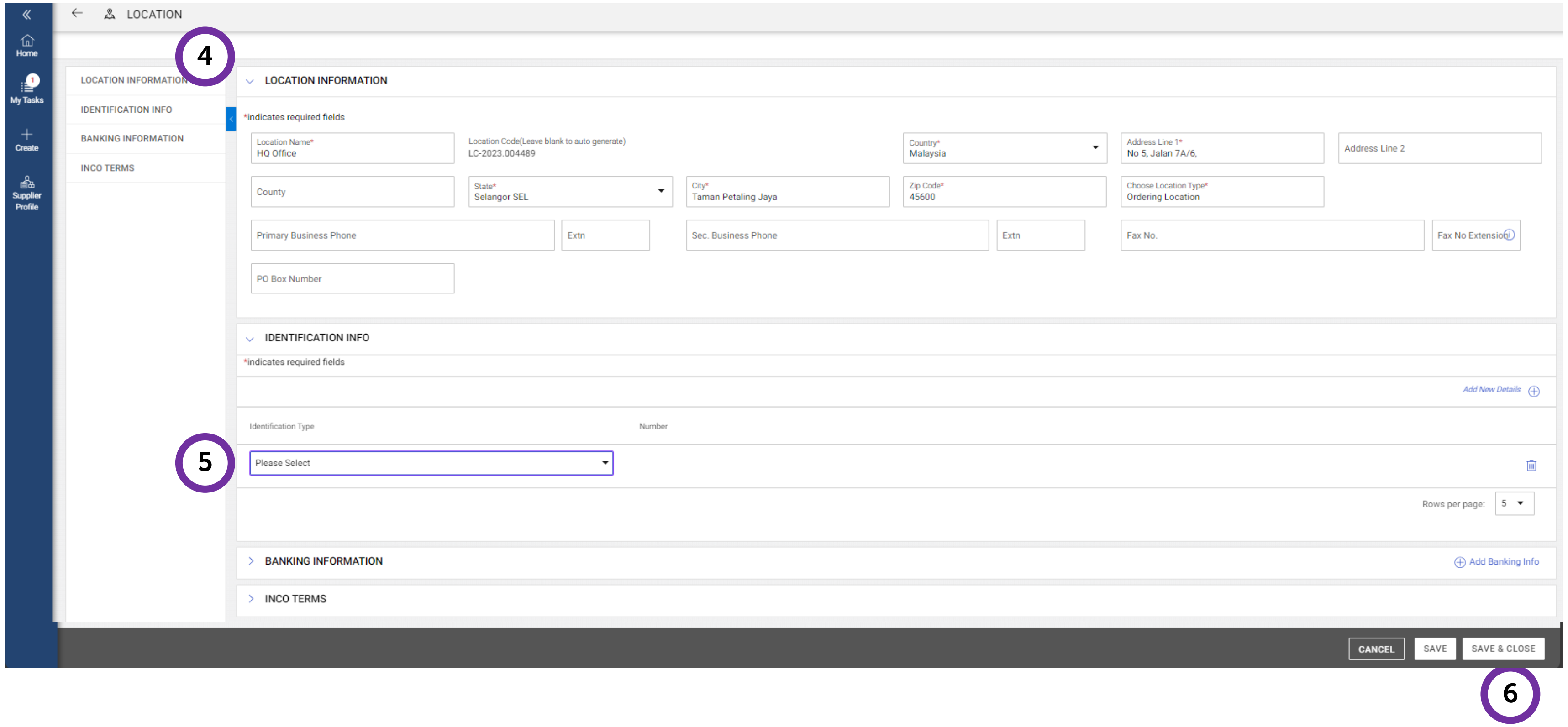


1	There are 3 different location types with 'Headquarter' appearing as default. However, you are required to have at least one (1) 'Ordering Location' and 'Remit to Location'. • **Ordering Location** – the address where PETRONAS will send the PO. If Headquarter is the intended address, kindly proceed to copy the Headquarter's address as a separate Ordering Location. • **Remit to Location** – the address and bank account where PETRONAS will send the invoice payment.
2	You may also add multiple Ordering Location or Remit to Location as required. Click the (+) icon to add new location.
3	Click the edit icon to edit location.

Location Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Ordering Location is the location for PETRONAS to address any POs. Supplier may have multiple ordering locations depending on their business organisation.

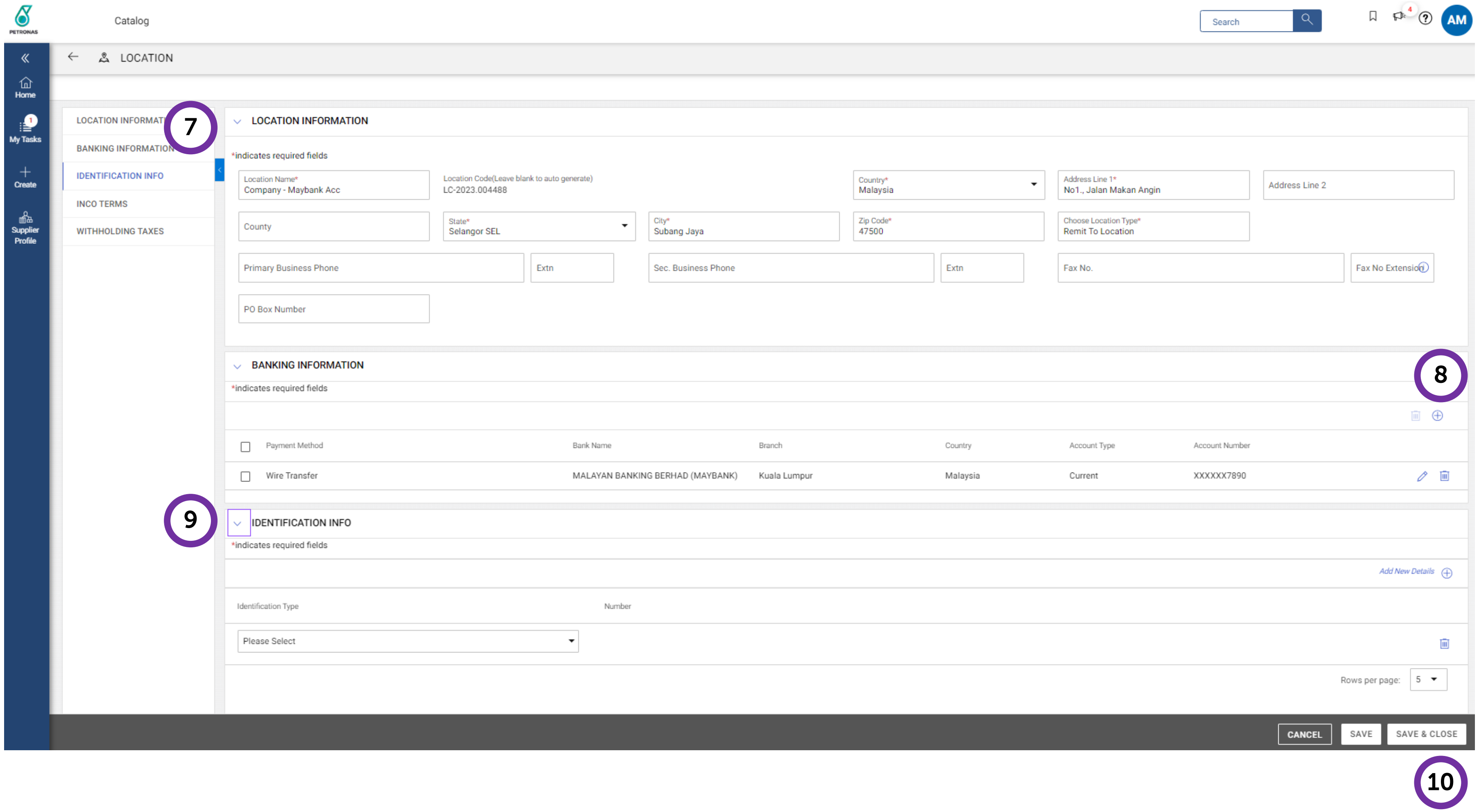


4	Fill up the mandatory fields (including your Primary Business Phone and Fax No) and select the '**Location Type**' as '**Ordering Location**'. Note: The Location Name is for supplier's ease of reference (e.g. Kemaman Warehouse).
5	You may also link relevant Identification Info for the location as explained in Identification Information section.
6	Once completed, click '**Save & Close**'.

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Location Information

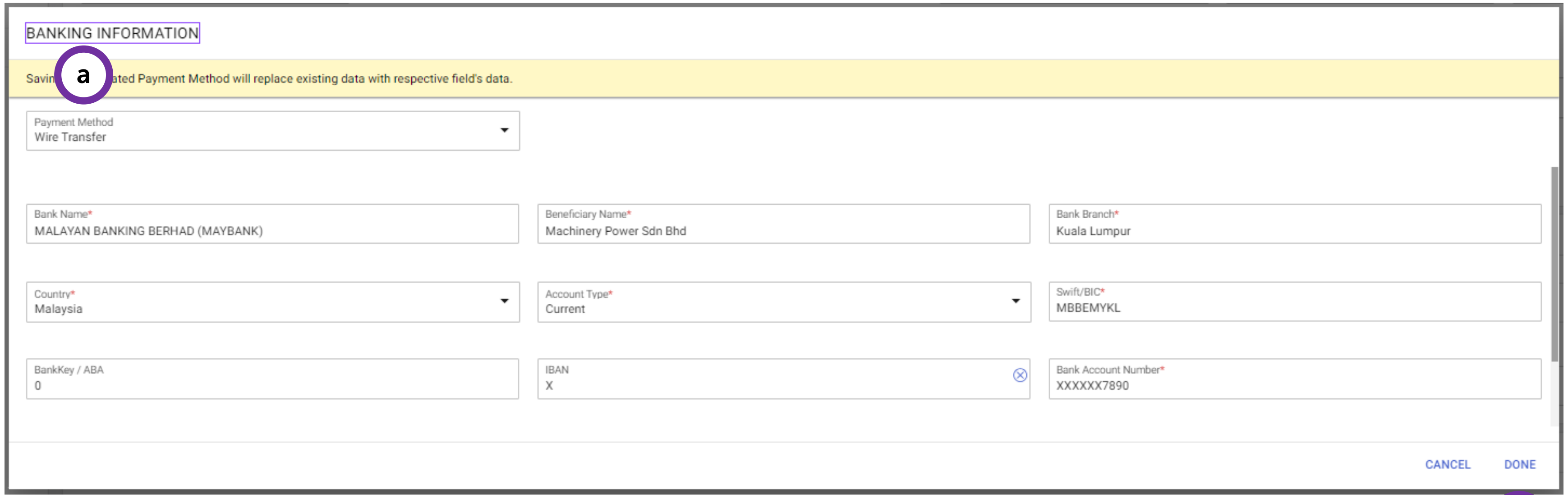
Remit to Location is the location for PETRONAS to process any invoice payment. Supplier may have multiple Remit to Locations for each bank account.



7	Fill up the mandatory fields and select the '**Location Type**' as '**Remit to Location**'. Note: The Location Name is for supplier's ease of reference (e.g. Kuala Lumpur Finance Office).
8	Enter only one (1) bank account's information. Simply click on the (+) or edit icon to update the banking information. Important: If supplier has multiple bank accounts, please proceed to create new 'Remit to Location' for each bank account. Refer next page for detail step
9	You may also link relevant identification info for the location.
10	Once completed, click '**Save & Close**'.

Location Information

At the Banking Information section, supplier should select wire transfer as the payment method and complete the mandatory fields.



b

Sample Malaysian Bank Name based on SWIFT Code:
1. CIMB BANK BERHAD
2. AMBANK (M) BERHAD
3. MALAYAN BANKING BERHAD (MAYBANK)
4. UNITED OVERSEAS BANK (MALAYSIA) BERHAD
5. RHB BANK BERHAD
6. HSBC BANK MALAYSIA BERHAD

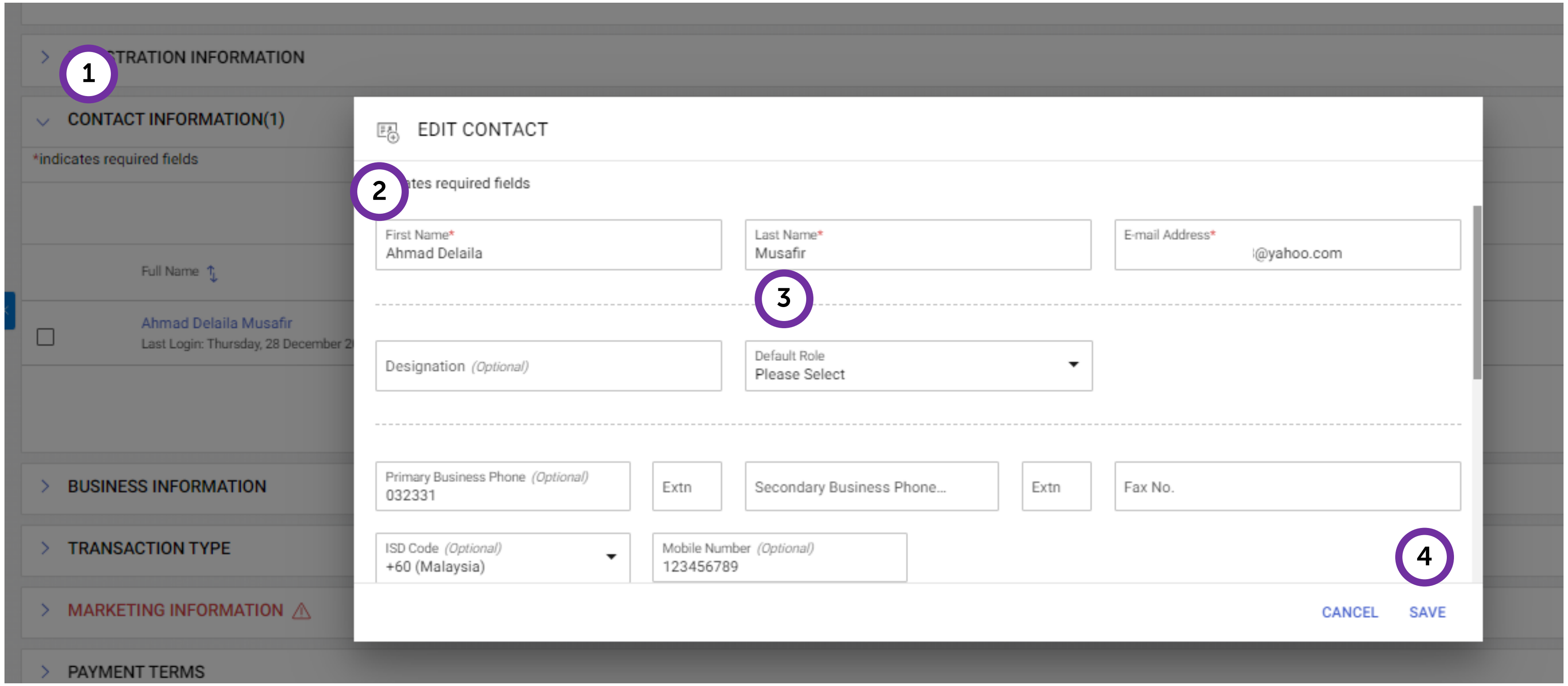
Important: Please ensure to attach the supporting document (e.g. Bank Statement Header or Bank Confirmation Letter) under **Certificates section** for each of the newly added banking information. Information input in Banking information section should match with the Bank Statement attached.

a	Important Guidelines • **Bank Name** – registered Bank Name based on SWIFT code entered. • **Beneficiary Name** – registered bank account name. • **SWIFT/BIC** – set of 8 or 11 digits that represents a bank branch. • **Bank Key/ABA** – routing number for international bank account (e.g. Australia, India, Russia, South Africa, United Kingdom, USA). If not applicable, enter 0. • **IBAN** – international bank account number. If not applicable, enter 0. • **Bank Account Number** – should consist of 10, 12, 15 or 16 characters. • **Verify Bank Account Number**: must be the same as Bank Account Number entered.
b	Once completed, click ‘**Done**’.

Contact Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

In the Contact Information section, supplier may add additional contacts and assign their level of access in the system.

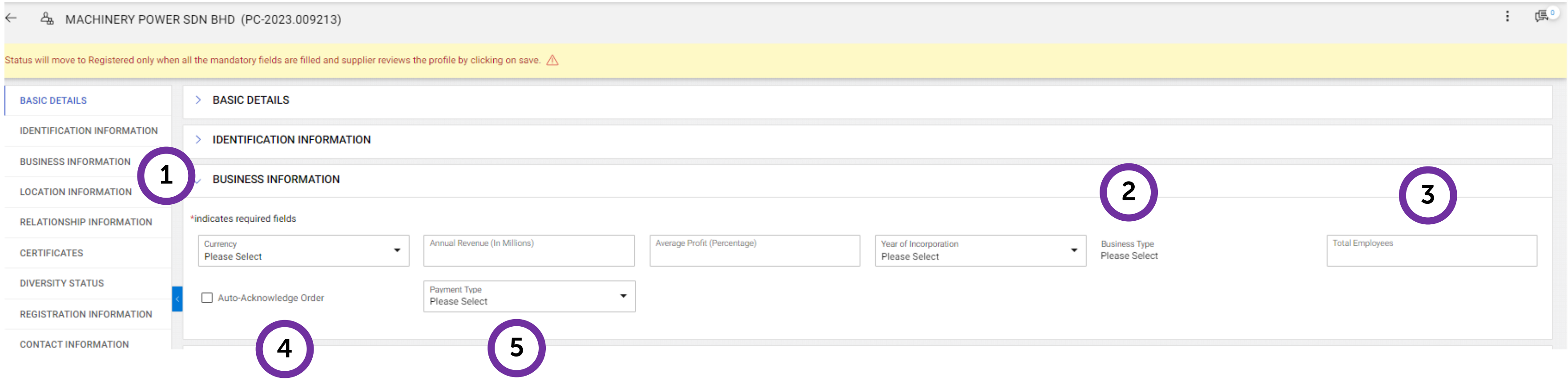


1	Scroll to the '**Contact Information**' section. Click on the (+) icon to add additional contacts.
2	Enter the required information in each of the fields. The fields marked with asterisk (*) are mandatory.
3	Select the default role for the contact. • **Supplier Administrator** – able to perform all activities. • **Sales Manager** – able to view contract and participate in RFx. • **Legal Advisor** – able to view contract and participate in RFx. • **Ordering Manager** – able to view, acknowledge PO and submit SES. • **Accounts & Finance Manager** – able to view, create Invoice and Credit Note.
4	Click '**Save**' to save the information entered.

Business Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier may provide additional information on business information.



1	Kindly select the currency and enter the annual revenue in the '**Annual Revenue (In Millions)**' field.
2	'**Business type**' is refers to the business incorporation type i.e. Private Limited, Government Agencies, etc. Select the relevant business type.
3	'**Total No. of Employees**' refers to the total number of employees actively hired by the supplier.
4	'**Auto-Acknowledge Order**' refers to the method of accepting the Purchase Order. **Kindly leave it unticked.** This will allow supplier to manually acknowledge each PO issued by PETRONAS.
5	'**Payment Type**' is referred to the default payment remittance method issued by PETRONAS. **Kindly leave this field empty.**

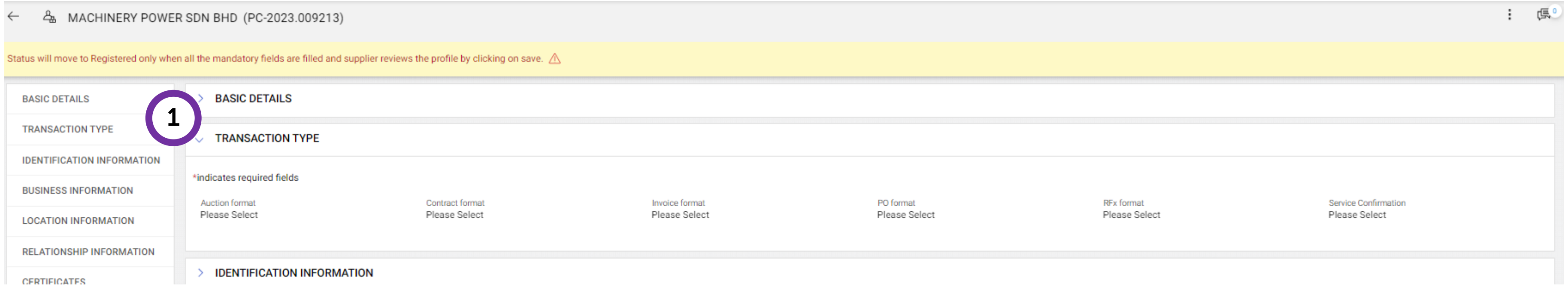
If 'Auto-Acknowledge Order' is ticked, each PO issued by PETRONAS will be automatically acknowledge/accepted and supplier are obliged to render services/products as per the PO.

Transaction Type

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

This section is not required to be filled by supplier.

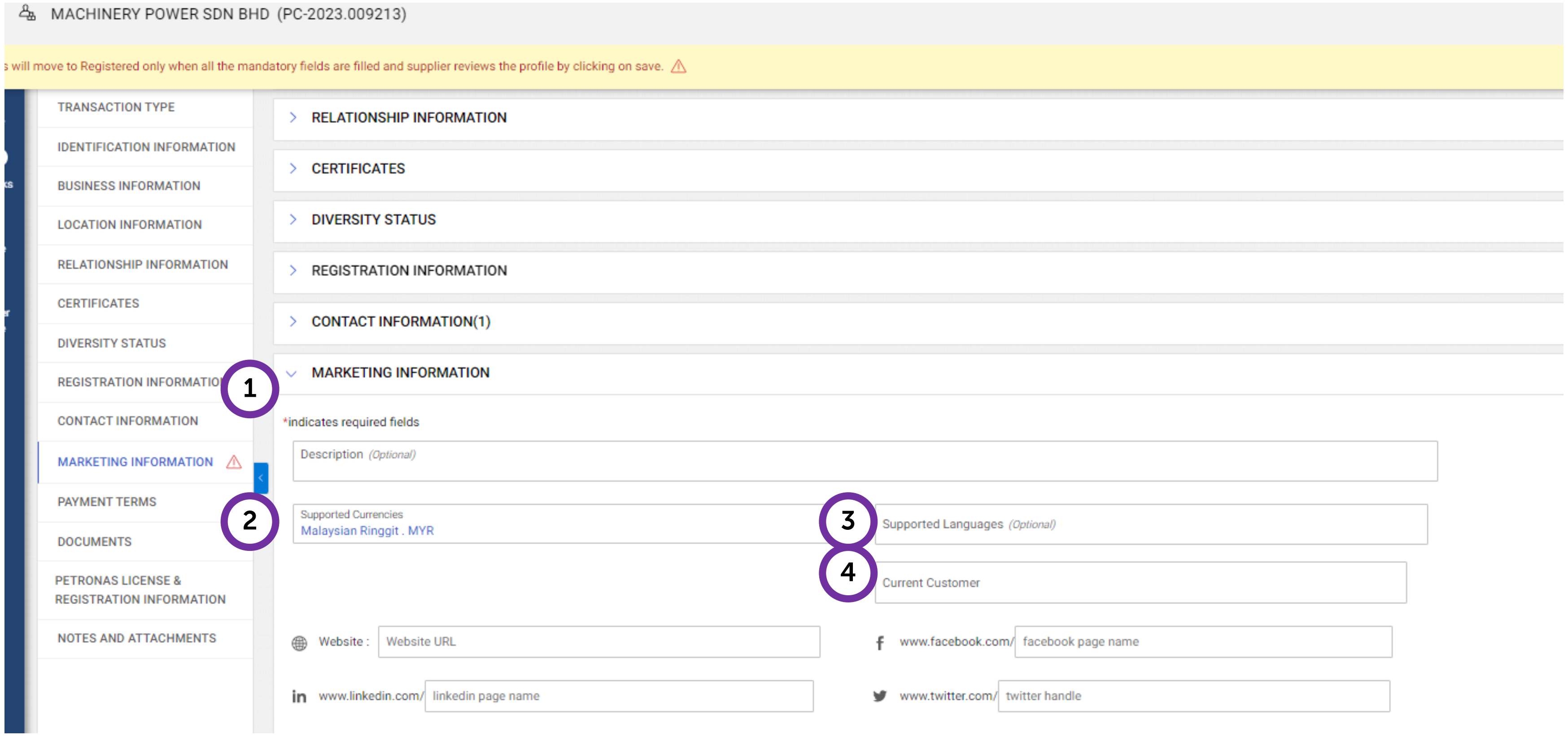
1 Kindly **DO NOT** make any changes to this section.



Marketing Information

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier is required to select the supported currencies and can maintain the marketing information e.g. company summary, website and social media accounts.



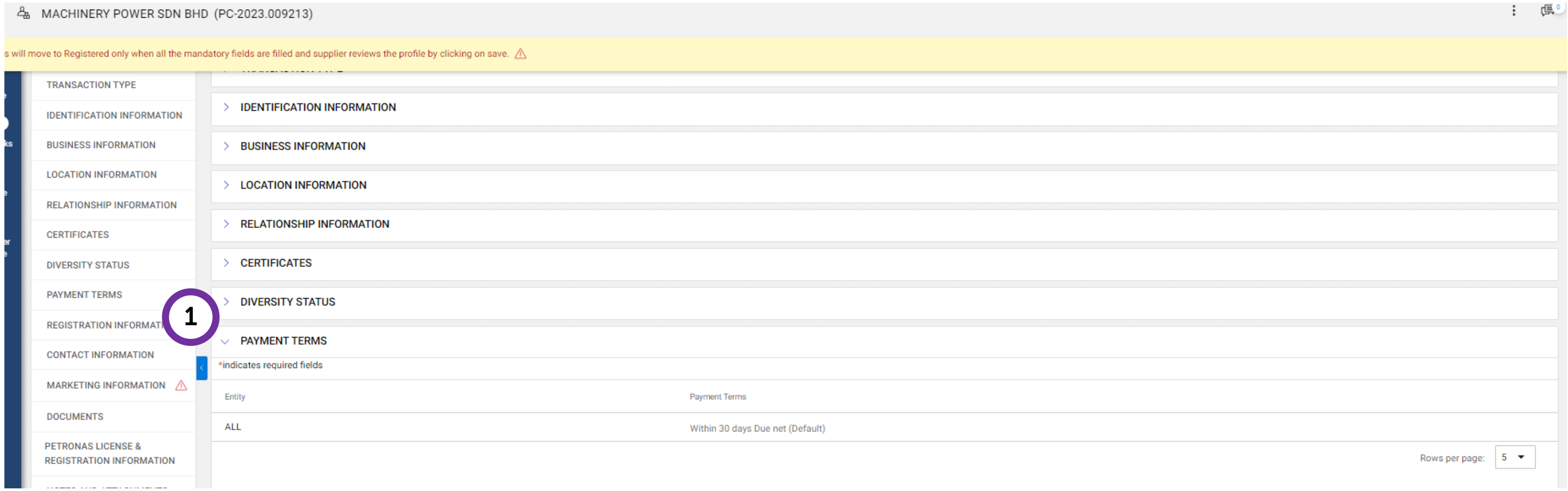
1	Under '**Description**', you may provide further information on your company summary of offerings.
2	'**Supported Currencies**' refers to all the currencies supported for payment purposes. Supplier is required to select at least one supported currency.
3	'**Supported Languages**' refers to supported languages by the supplier in conducting business with PETRONAS.
4	'**Current Customer**' refers to the current customer that the supplier is currently conducting business with.

Payment Terms

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

This section is not required to be filled by supplier.

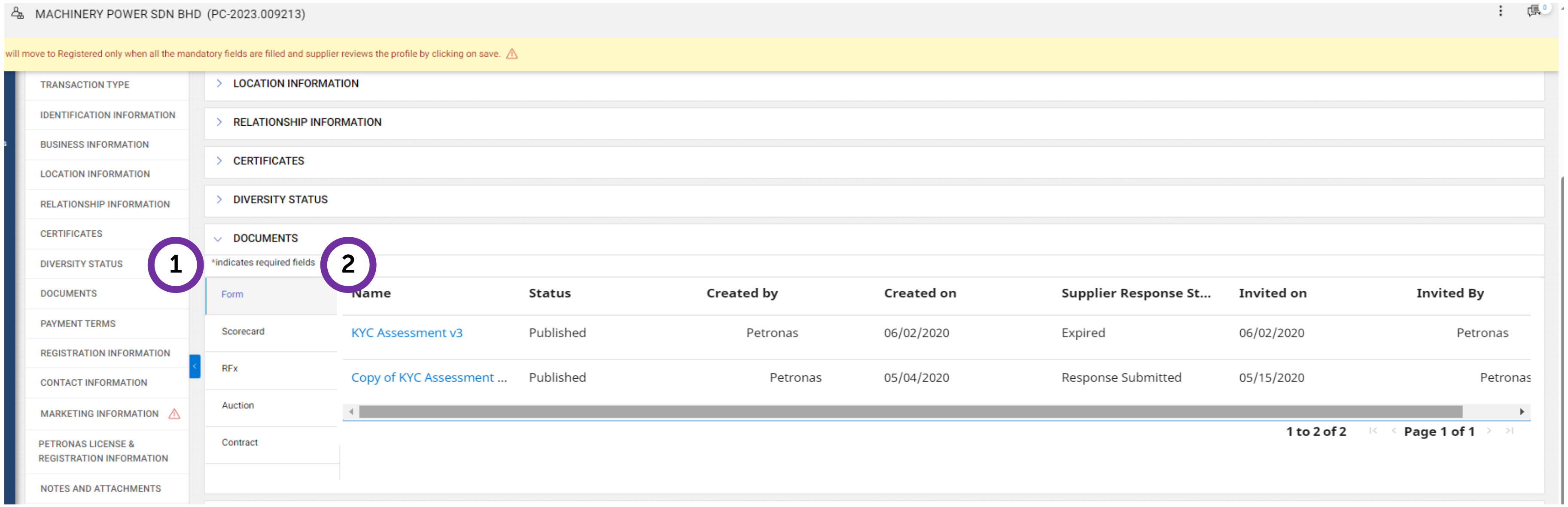
1	Supplier will not be able to make any changes to the payment terms.



Documents

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier may find all documents that has been created or issued before e.g. RFx, Contract, PO, etc.

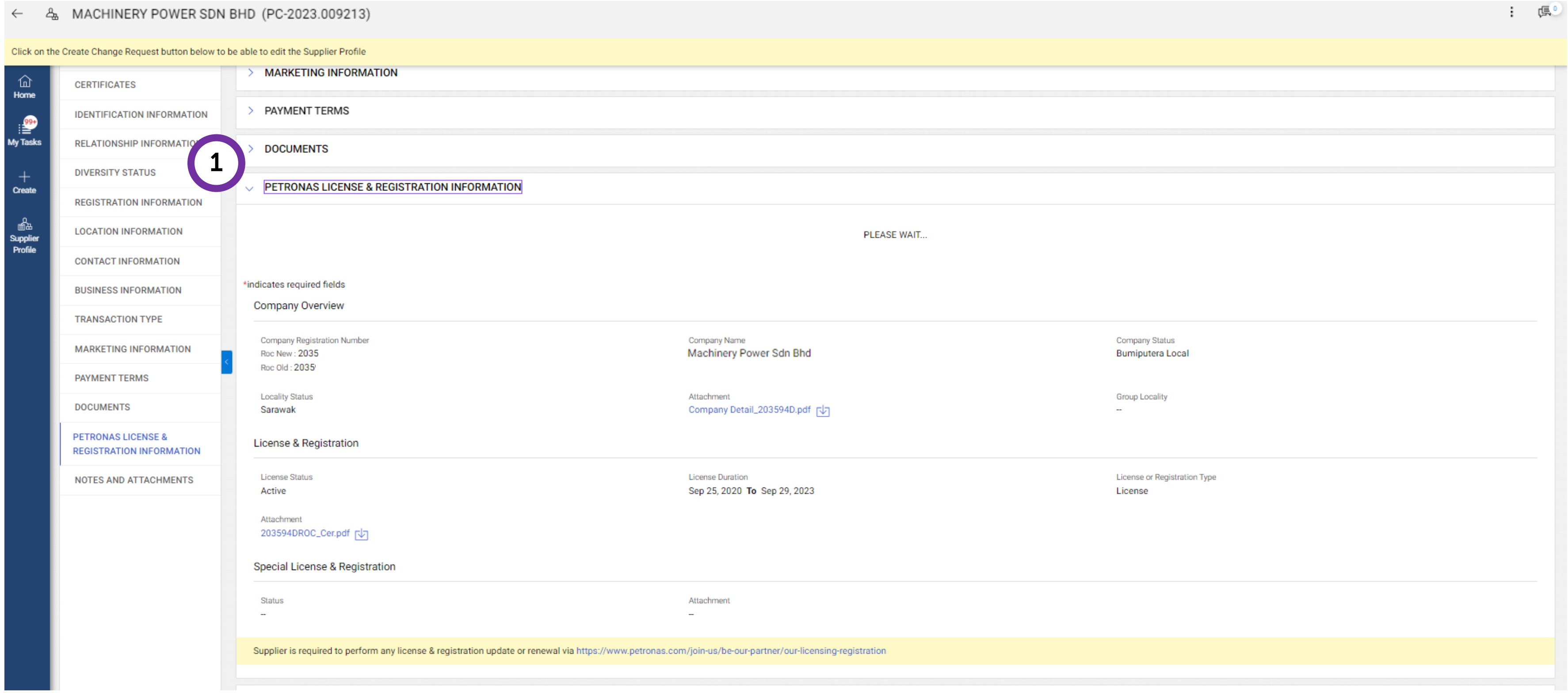


1	Each document is segregated by the document type. Kindly select the relevant document type on the left.
2	Once selected, system will display all the documents that are available. To open, simply click on the document name.

PETRONAS License & Registration Information

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

<u>PETRONAS License & Registration information</u> will be automatically populated in the Supplier Profile for ease of reference.



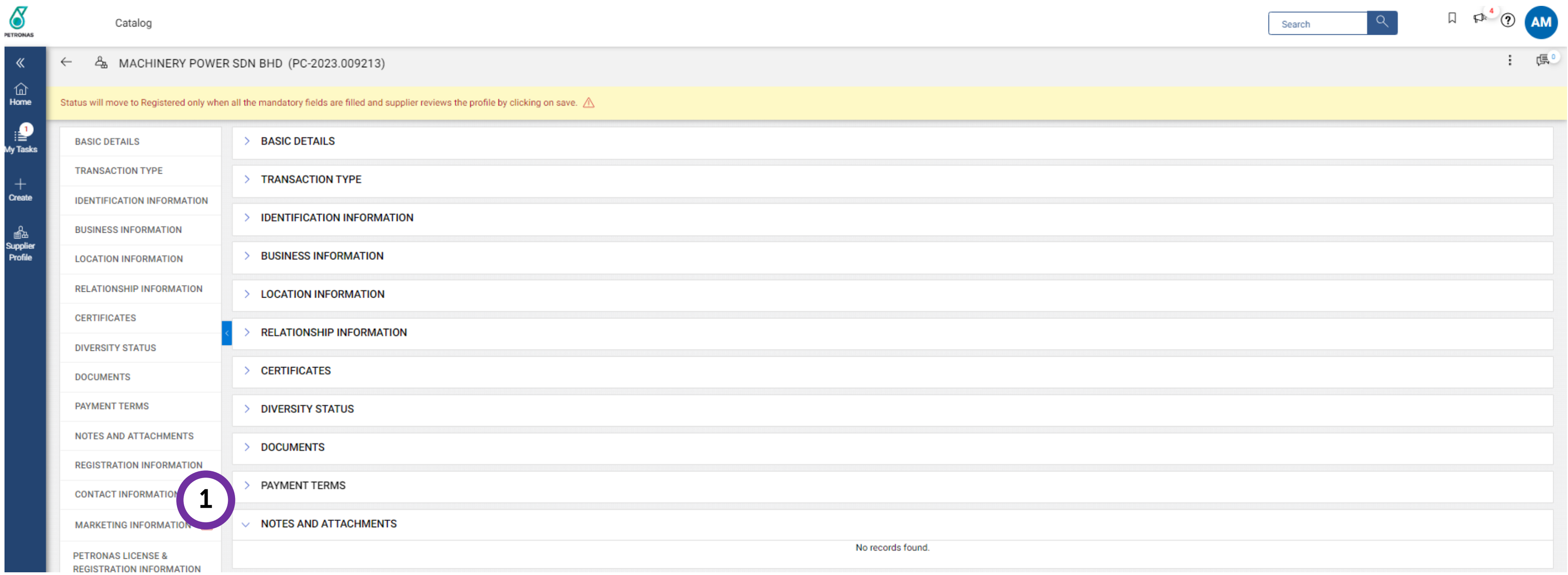
1 This section is not editable and only relevant for PETRONAS Licensed and Registered suppliers. Their license and registration information will be populated here.

Any changes to the information in this section will need to be performed in the PETRONAS Licensing Management System (PLMS).

Notes & Attachments

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

Supplier may find all notes and attachments that has been created for the supplier by PETRONAS.

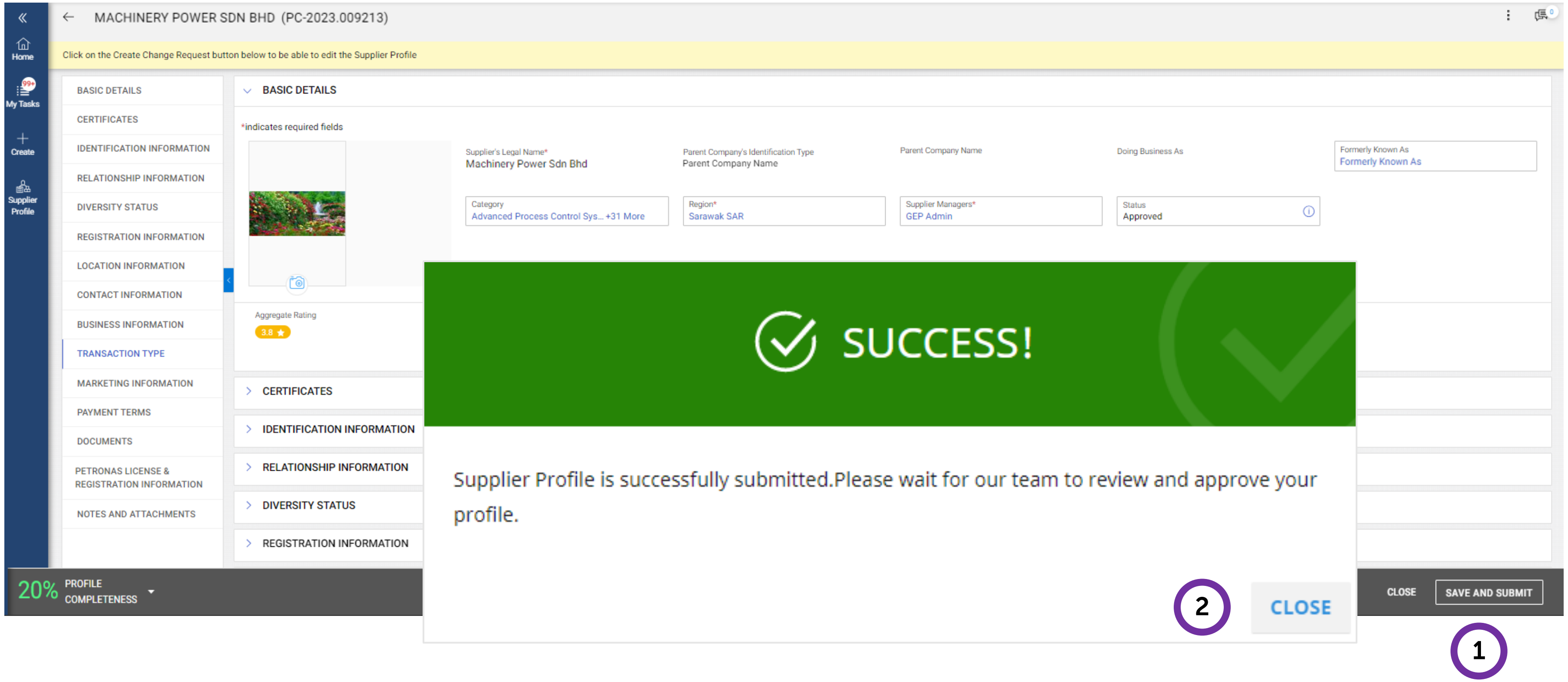


1	Supplier will not be able to make any changes to the payment terms. By default, this section is blank.

Submit for Approval

1 Complete Supplier Profile
2 Submit For Approval
3 Update Supplier Profile

Supplier to ensure that all necessary information has been provided before submitting their Supplier Profile for PETRONAS approval.



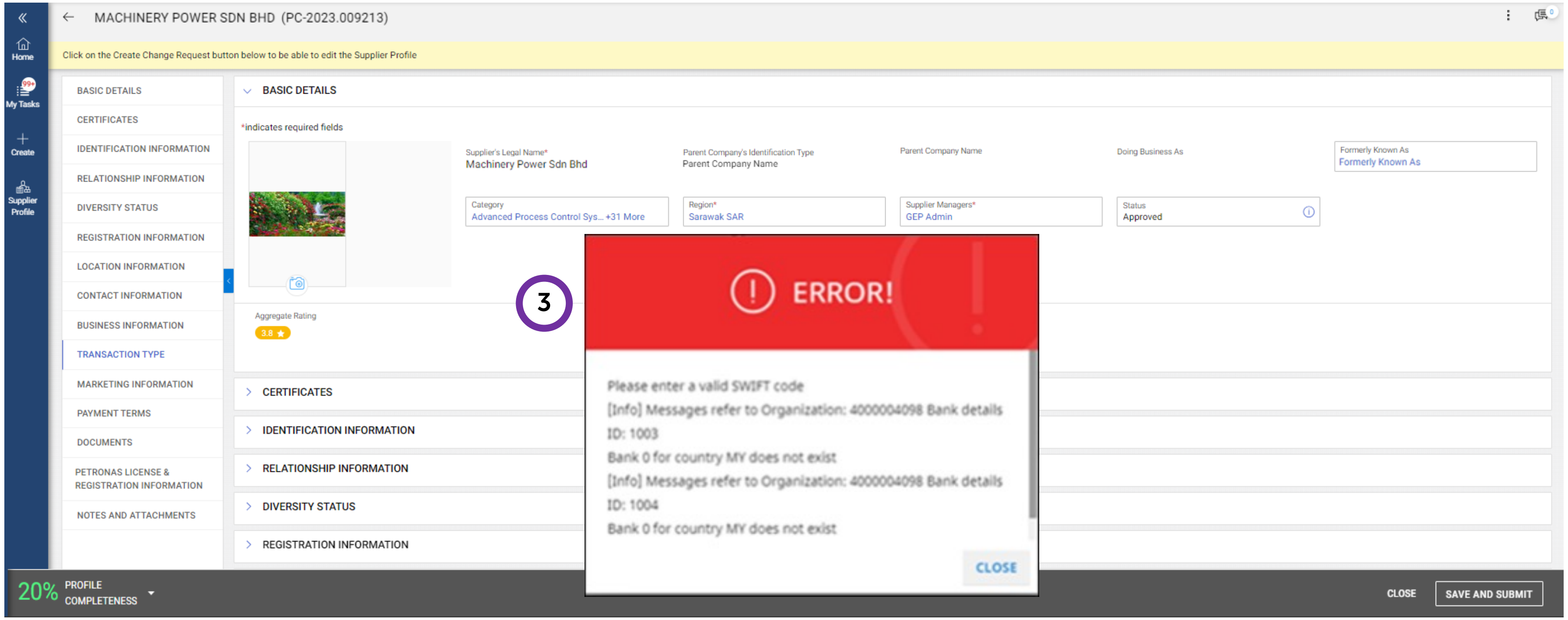
1	Click 'Save and Submit' to submit the supplier profile to PETRONAS for approval. Note: To ensure data quality, the system will perform a background data quality check automatically. Kindly amend the relevant field as required (when prompted) and re-submit for approval.
2	You will be prompted with a notification on successful submission of your Supplier Profile. PETRONAS shall review and process your submission accordingly. You will receive a notification from PETRONAS regarding the evaluation results.

For existing PETRONAS suppliers with GEP SMART access, you are required to ensure your **Supplier Profile is always with Approved Status,** and you're good to go!

Submit for Approval

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier to ensure that all necessary information has been provided before submitting their Supplier Profile for PETRONAS approval.



3

During submission, if you are prompted with an Error Message, it means that the submitted supplier profile contains incorrect information or does not follow PETRONAS data governance rules.

Please read through the message and click on '**Close**'. You may refer the full list of data quality error messages and suggested rectifications in the next page.

Kindly amend the relevant field as required (when prompted) and re-submit for approval.

Data Quality Error Rectifications

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier should amend the relevant field as required (when prompted) and re-submit for approval.

Error Message in Data Quality	Rectification	Affected Section
There is an error in performing data quality checks for the submitted profile. Kindly retry.	Supplier is required to retry the submission by clicking on the Submit button. If unable to proceed after few tries, please screenshot the error and send and email to supplier.servicedesk@petronas.com for further checking.	All
Legal Company Name is longer than the allowed maximum value: 70.	Under Basic Details section, Supplier is required to maintain Legal Company Name that is up to 70 characters only.	Basic Details
Missing required fields: [\DivisionandOrgEntities\"]."	Please screenshot the error and send and email to supplier.servicedesk@petronas.com for further checking.	Basic Details
State is longer than the allowed maximum value: 3.	Please screenshot the error and send and email to supplier.servicedesk@petronas.com for further checking.	Basic Details
Missing required fields: [\IdenfiticationInfo\"]."	Under Identification Information section, Supplier is required to maintain the company registration number by selecting identification type "ROC (Old)" and maintain your company registration number	Identification Information
TIN – Tax Number MY7: Format is invalid.	Supplier is required to retry and submit their TIN information in the correct format that is up to 14 characters only.	Identification Information
ROC (New) xxxxxxxxxxxxxxxxxxxxx Exceeds field limit 20	Supplier is required to retry and ensure that their ROC (New) is accurate and does not exceed 20 characters.	Identification Information
Address line - [ISC.0164.0008] Specified string: \Binjai 54\\nLorong BinjaiUnit 89-N, Binjai 54\\nLorong Binjai\" does not match the ECMA 242 pattern: \"^(.*)$\"."	User to remove any newline or special characters included in Address field.	Location Information
Missing required fields: [\LocationInfo\"]."	Under Location Information section, Supplier is required to maintain at least one Ordering Location.	Location Information

Data Quality Error Rectifications

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

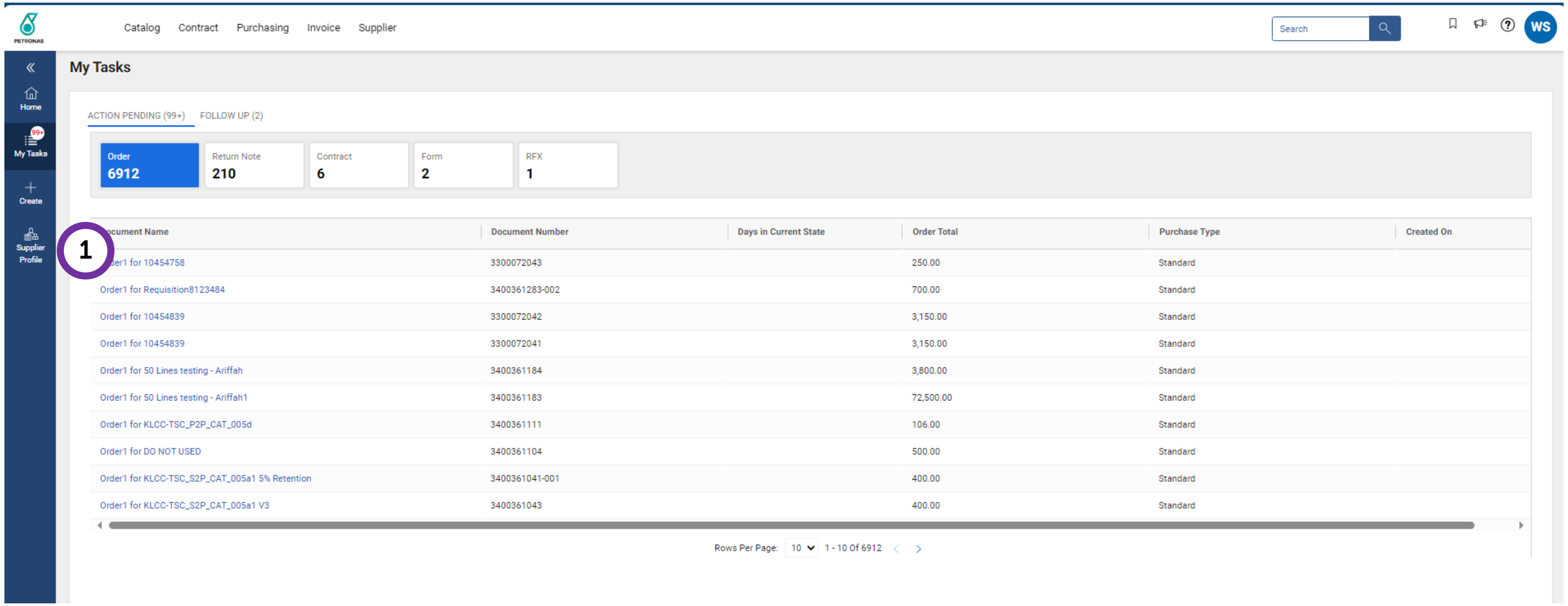
Supplier should amend the relevant field as required (when prompted) and re-submit for approval.

Error Message in Data Quality	Rectification	Affected Section
One Ordering Location is Mandatory.	Under Location Information section, Supplier is required to maintain at least one Ordering Location.	Location Information
Only one Remit to Location is allowed.	Under relevant Location (Remit to Location) section> Banking Information. Supplier to remove additional Banking Information from the Remit to Location. Only one Banking Information is allowed to be maintained for each Remit to Location. For additional Banking Information, please maintain a new Remit to Location.	Location Information
Primary Business Phone Number is longer than the allowed maximum value: 16.	Under relevant Location (Headquarters or Ordering Location) section> Primary Business Phone, Supplier to maintain the Primary Business Phone number up to 16 characters only.	Location Information
Invalid Bank Name for Swift/BIC HBMBMYKL. Possible Value is HSBC BANK MALAYSIA BERHAD.	Under relevant Location (Remit to Location) section > Banking Information, please amend the Bank Name with the possible value as stated from the data quality message.	Location Information
[Info] Messages refer to Organisation: $129 Bank details ID: 1001 Bank 022000020 for country MY does not exist	Under relevant Location (Remit to Location) section > Banking Information. For Malaysia bank account, please ensure to default the "BankKey/ABA" to 0. For Foreign bank account, if applicable, please ensure to maintain the correct routing number in "BankKey/ABA". If not application, please maintain "BankKey/ABA' to 0.	Location Information
Bank Account Number cannot be empty.	Under relevant Location (Remit to Location) section > Banking Information, Supplier is required to maintain the Bank Account number	Location Information
IBAN cannot be empty.	Under relevant Location (Remit to Location) section > Banking Information, Supplier is required to maintain the IBAN number.	Location Information
Missing required fields: [\PaymentTerms\"]."	Please screenshot the error and send and email to supplier.servicedesk@petronas.com for further checking.	Payment Terms

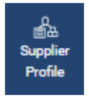
Update Supplier Profile

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Supplier Profile information can be updated as and when required and it is always essential to keep their information updated.



1	To update your profile, click on the '**Supplier Profile**' button.

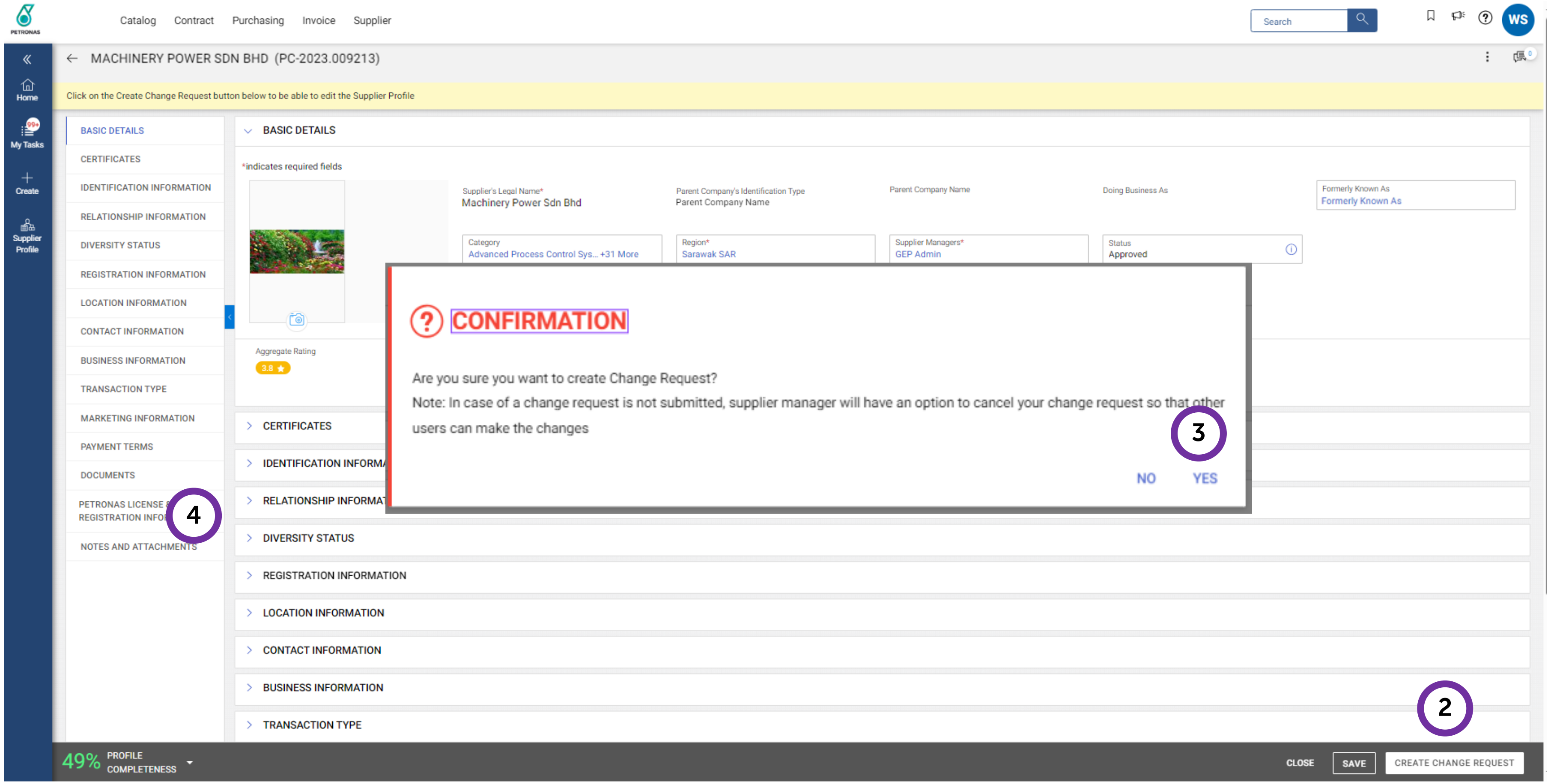


Ensure your profile is always being updated and observe any warning indicators if there are any missing mandatory information (New-ROC, TIN, Primary Business Phone, Fax No, etc.) or certificates expiry.

Update Supplier Profile

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Approved suppliers are required to create a Change Request prior to amendment of information in GEP SMART.

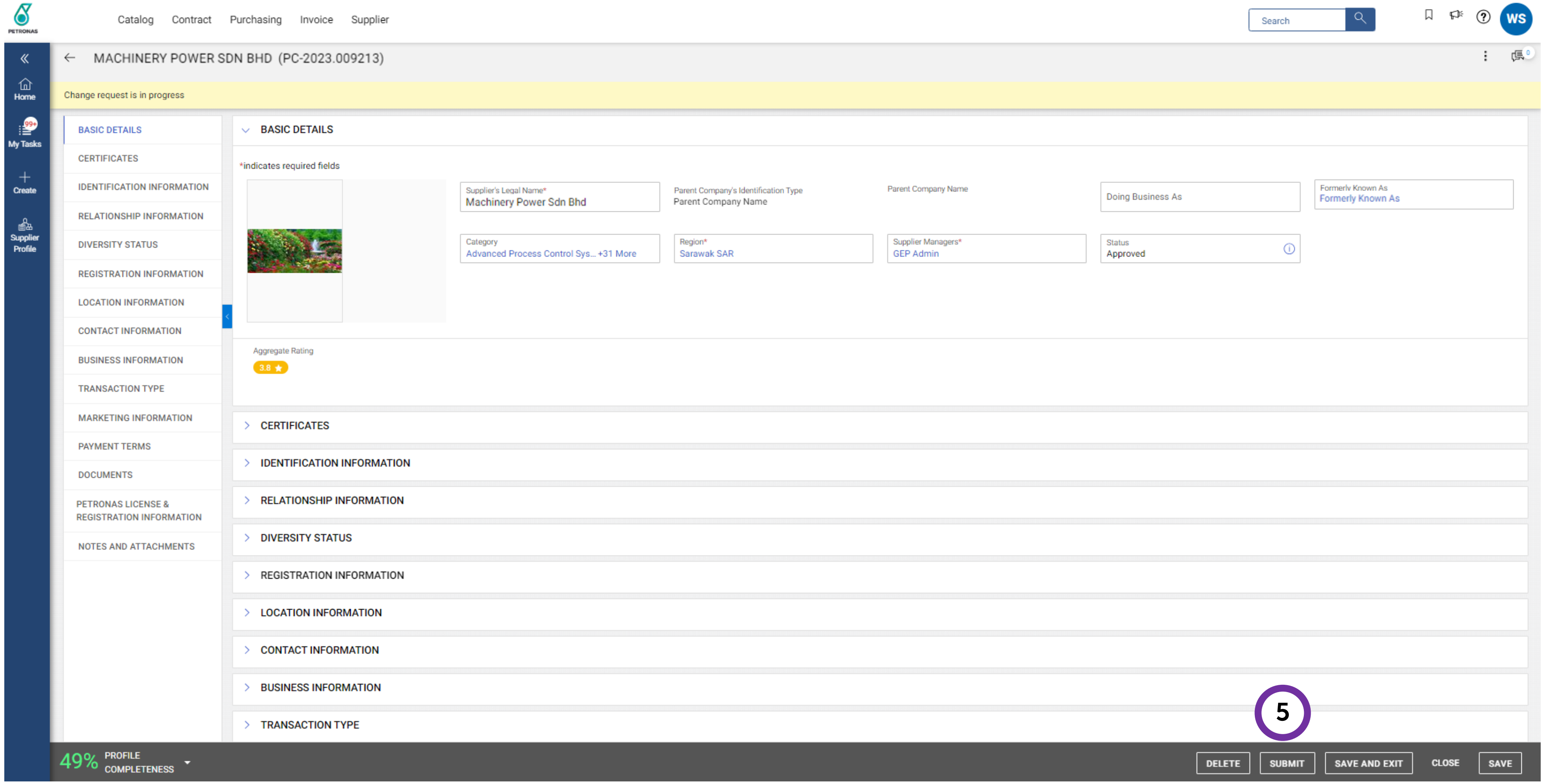


2	To begin, click '**Create Change Request**'.
3	Click '**Yes**' to proceed with creation of the Change Request.
4	Once Change Request has been created, you are now able to amend fields in the Supplier Profile (e.g. adding new Location, new Bank Information, new contacts etc.). For **PETRONAS Licensed and Registered suppliers**, some fields are **locked and no changes are allowed**. Any changes to the following need to be made in **PETRONAS License Management System (PLMS):** • **Supplier's Legal Name** • **Category** • **PETRONAS License & Registration (Section)**

Update Supplier Profile

1 Complete Supplier Profile — 2 Submit For Approval — 3 Update Supplier Profile

Changes made to Supplier Profile will be verified by PETRONAS prior to approval.



5 Click '**Submit**' to submit the supplier profile to PETRONAS for approval.

You will receive a notification from PETRONAS regarding the evaluation results.

Note: To ensure data quality, the system will perform a background data quality check automatically.

Kindly amend the relevant field as required (when prompted) and re-submit for approval.

One (1) Change Request is allowed at a time. If there is existing Change Request pending approval, supplier will need to wait until PETRONAS Licensing Team review and approve/reject prior to submit another Change request

Application Deep Dive

RFx Response

GEP SMART enables online RFx submissions and provide a secure environment in responding and complying to the tender requirements.

Learning Objectives

Suppliers will be able to respond to the technical and commercial requirements as deemed by the tender and submit them successfully via the system.

1 Access RFx Event

- 1a Email Notification
- 1b My Tasks

2 Accept Guidelines

3 Submit Responses

4 RFx Status

Access RFx Event

[1a] Email Notification - Invited supplier will receive an email notification with the subject of "Invitation to participate in event XXX"

From: smartnotification@petronas.com.my <smartnotification@petronas.com.my> 1
Sent: Wednesday, December 13, 2023 3:17 PM
To:
Subject: Invitation to participate in event SMART Next Gen - YZ

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi ,

You have been invited to participate in a sourcing event by PETRONAS .

Event name: SMART Next Gen - YZ
Event start date/time: 13/12/2023 12:00:00 AM Singapore Standard Time
Event end date/time: 23/12/2023 12:00:00 AM Singapore Standard Time

2
Click here to access the sourcing event or copy-paste the following link in your browser window: https://smartuat.gep.com/Sourcing/rfx?dd=ZGM9MzYzMjEwJmJwYz03MDAyMTc5MA2&b=0&oloc=219&c=NzAwMjE3OTA1#/rfx/new

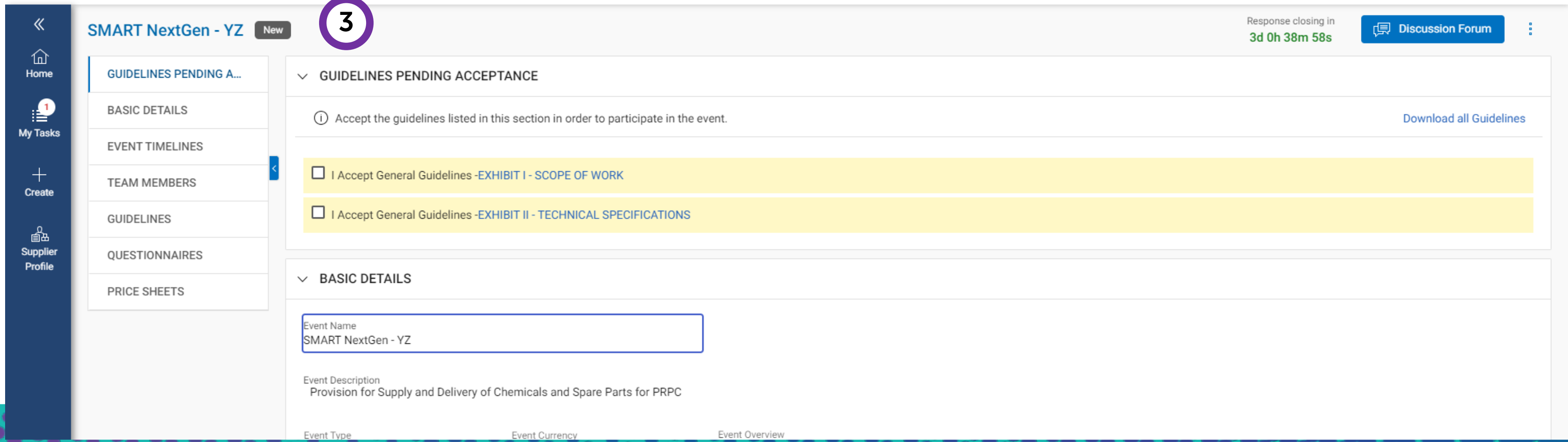
Basic instructions
1. If you do not have a SMART by GEP account, click here to create a new account and register yourself with PETRONAS.
2. After you create the password, you can log into SMART by GEP and select the event to participate.
3. Note that the time zone of the event is Singapore Standard Time. You may be in a different time zone, and therefore, make sure you log on at the right time to avoid missing the event.

If you have any questions, contact us on supplier.servicedesk@petronas.com or call our helpline number mentioned below. Our support team will help you get started.

Helpline:
PETRONAS CONTACT CENTRE (PCC) : +603 2331 3330

Regards,

PETRONAS

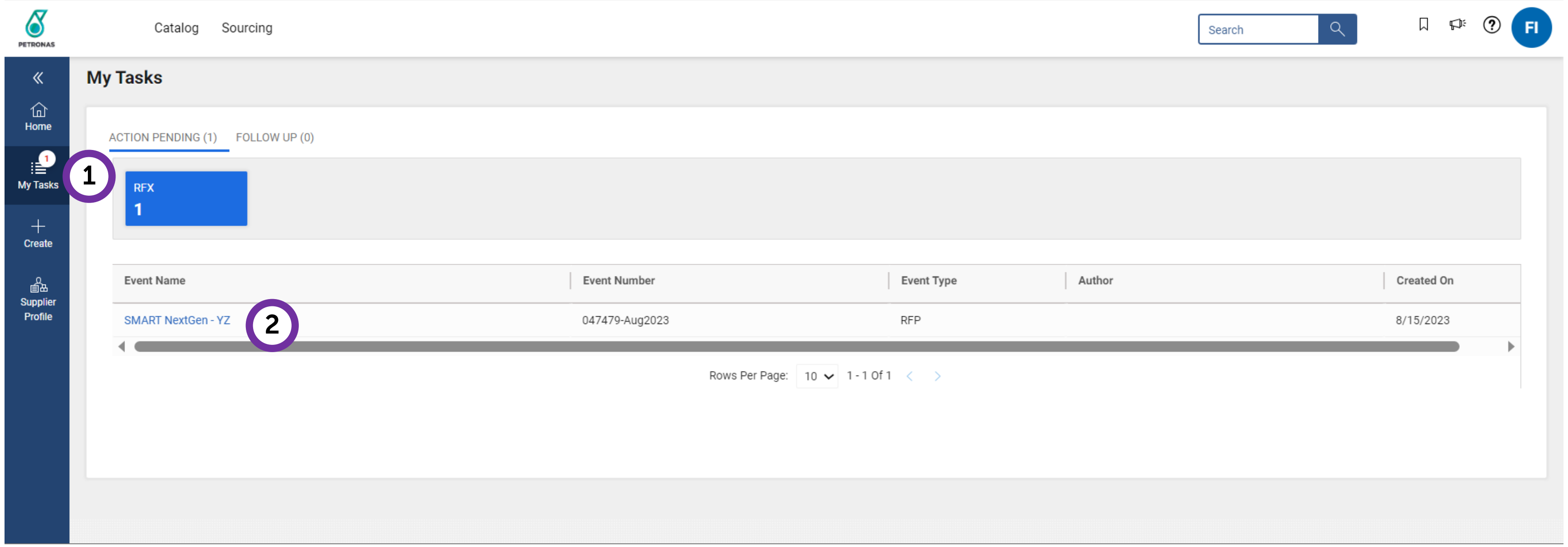


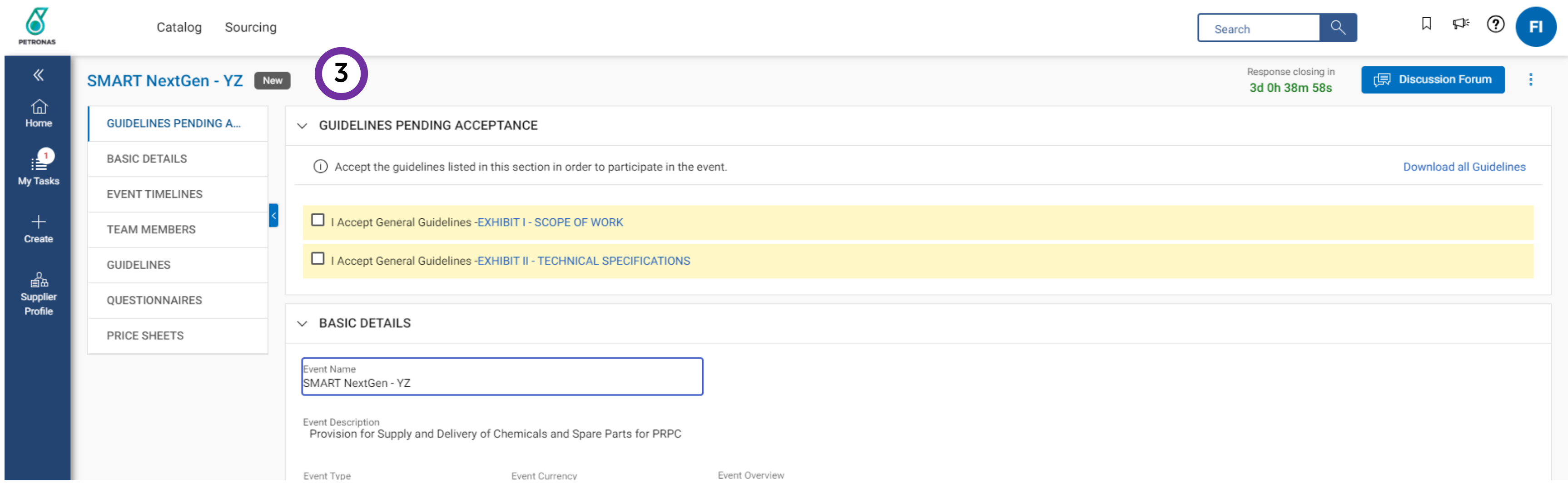
1	Supplier will receive an email notification to participate the RFx event
2	Click "**Click here**" from the email to access the sourcing event
3	RFx event will be displayed in SMART NextGen

Access RFx Event

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

[1b] My Tasks- Invited supplier able to view the RFx event via My Tasks



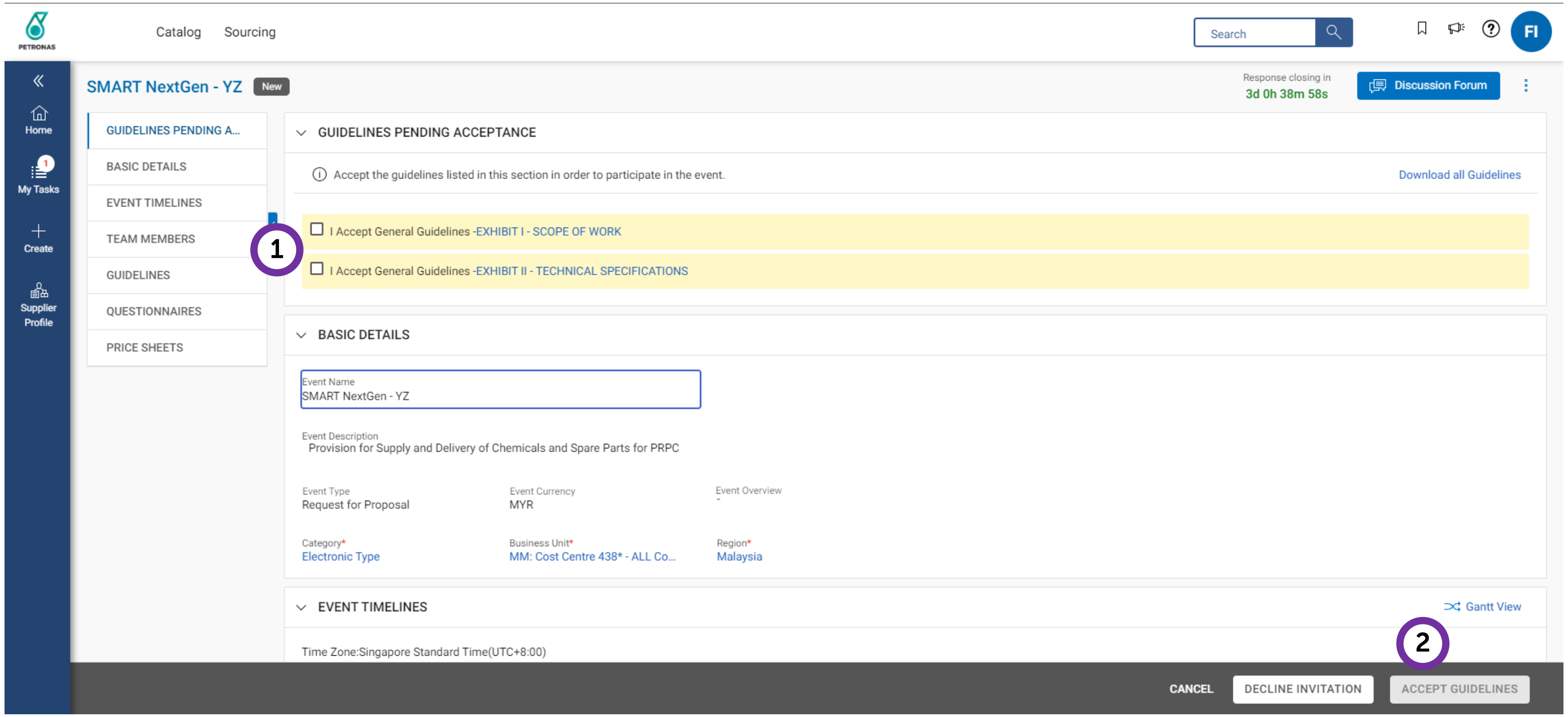


1	In order to view the RFx event, supplier need to click on "**My Tasks**" at the left panel from Home Page
2	Click "**RFx**" tab and select the RFx event under Event Name
3	RFx event will be displayed in SMART NextGen

Accept Guidelines

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

Accepting or declining the tender guidelines indicates supplier's understanding of the terms and conditions and represents their interest to participate.



1	**Check** the boxes for each section to indicate acceptance of the guidelines. Note: Please make sure to review all content of RFx (i.e. Basic Details, Timelines, Guidelines, Questionnaire, Price sheet) and read all attachments included in the RFx, if any. Note: Suppliers can check for more information on the RFX's OPU details by clicking on Business Unit in the Basic Details section.
2	Click '**Accept Guidelines**'. Note: You may choose to decline invitation if you do not want to participate in the bid.

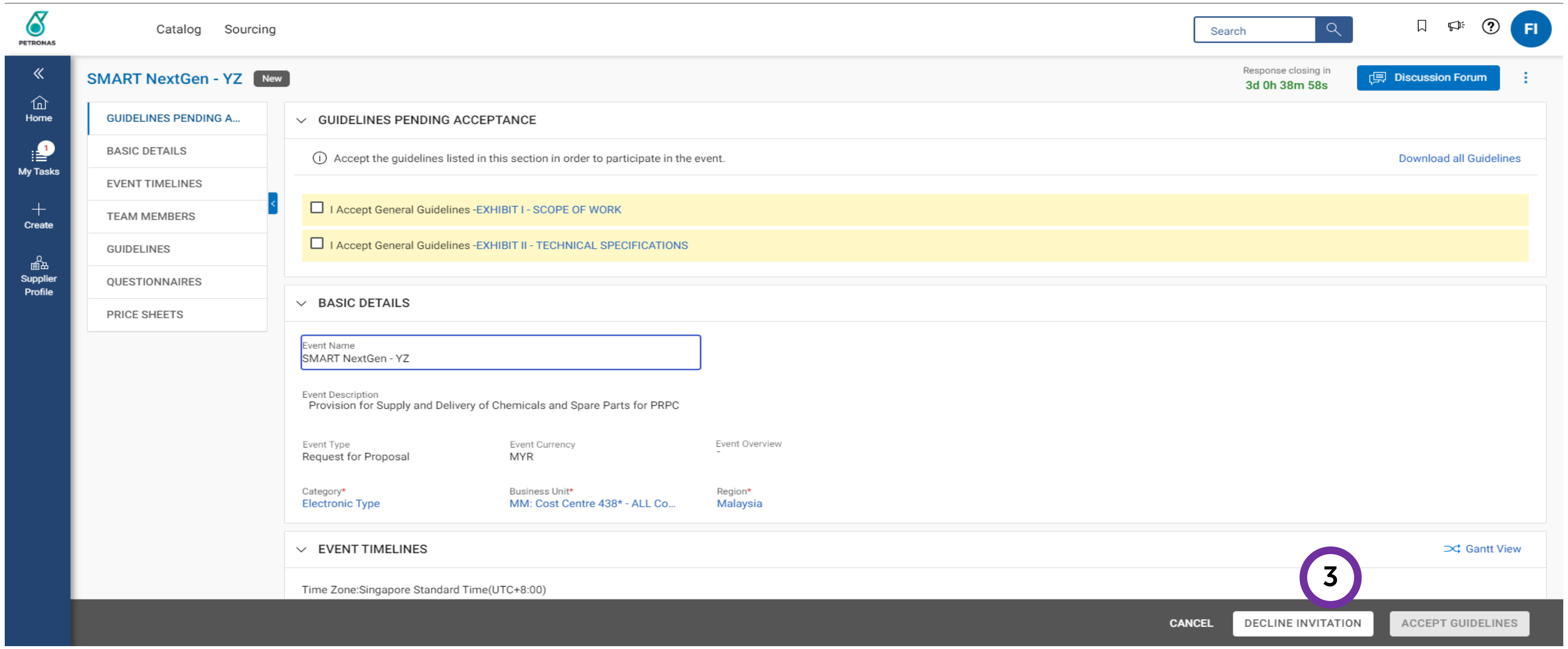
Acceptance of guidelines was previously known as **acceptance of Invitation to Bid (ITB)**. The content of guidelines is similar to PETRONAS' ITB documents.

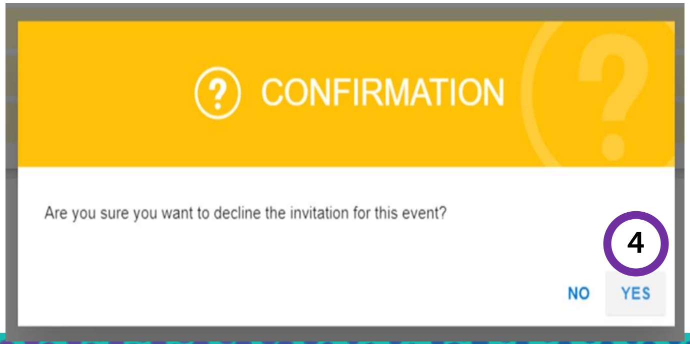
In the event guidelines acceptance is not performed, supplier will not be able to participate in the bid.

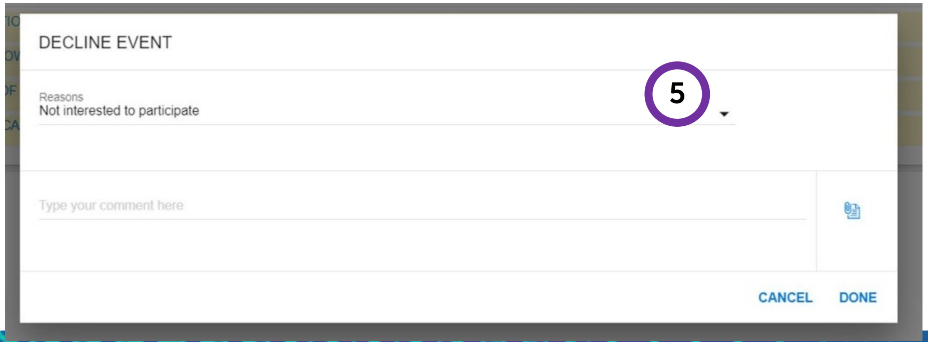
Accept Guidelines

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

Accepting or declining the tender guidelines indicates supplier's understanding of the terms and conditions and represents their interest to participate.





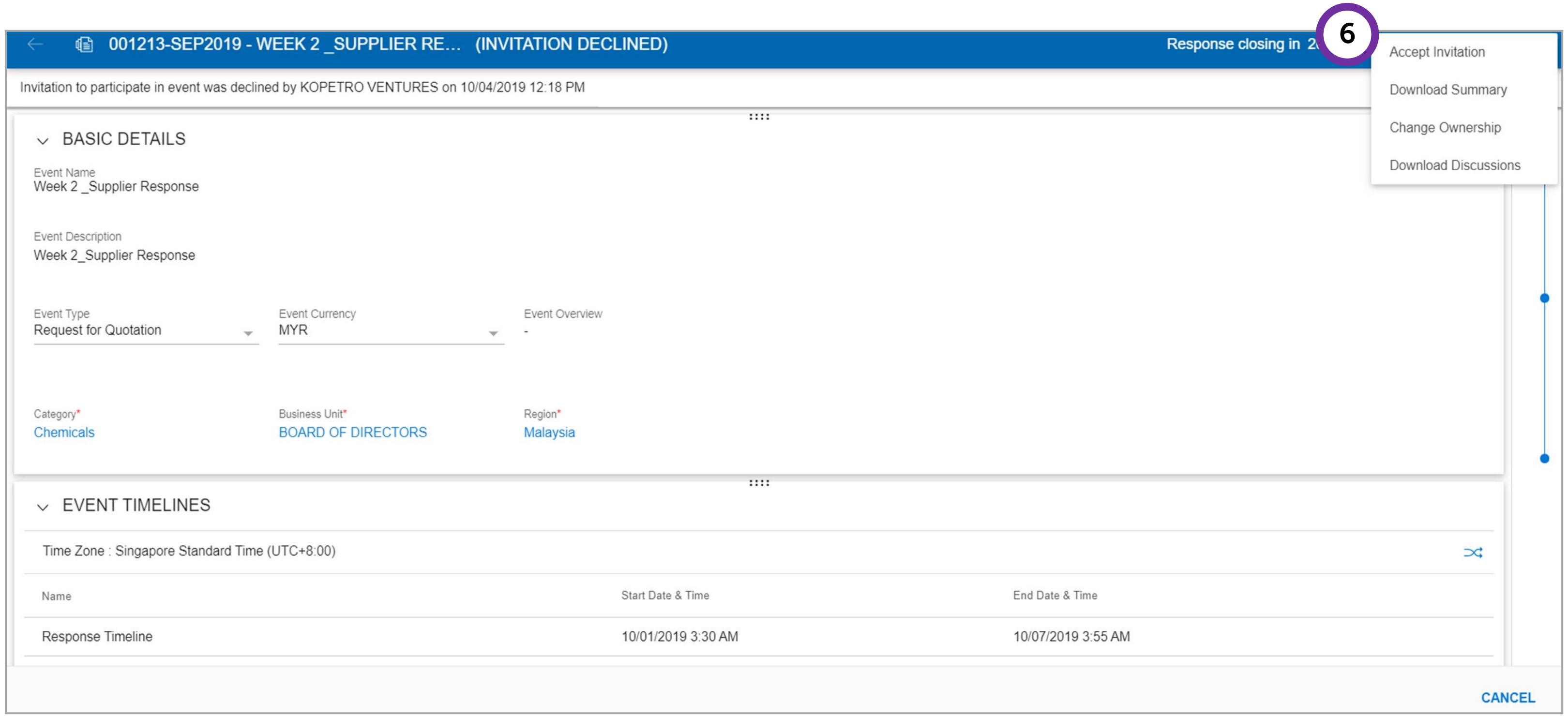


3	Click on the '**Decline Invitation**' button to decline.
4	At the window pop-up, click '**Yes**' to confirm.
5	Supplier would need to provide a reason for declining the invitation.

Accept Guidelines

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

Accepting or declining the tender guidelines indicates supplier's understanding of the terms and conditions and represents their interest to participate.



6 After declining the invitation, in an event that you would like to re-participate in the RFx, you can click on the '**Kebab icon**', then click on '**Accept Invitation**' to re-participate in the RFx.

Kebab icon: ⋮

Submit Responses Overview

After reviewing and accepting the tender guidelines, supplier will be required to provide their responses.

The requirements for each tender varies, and below are some of the highlighted sections for reference:

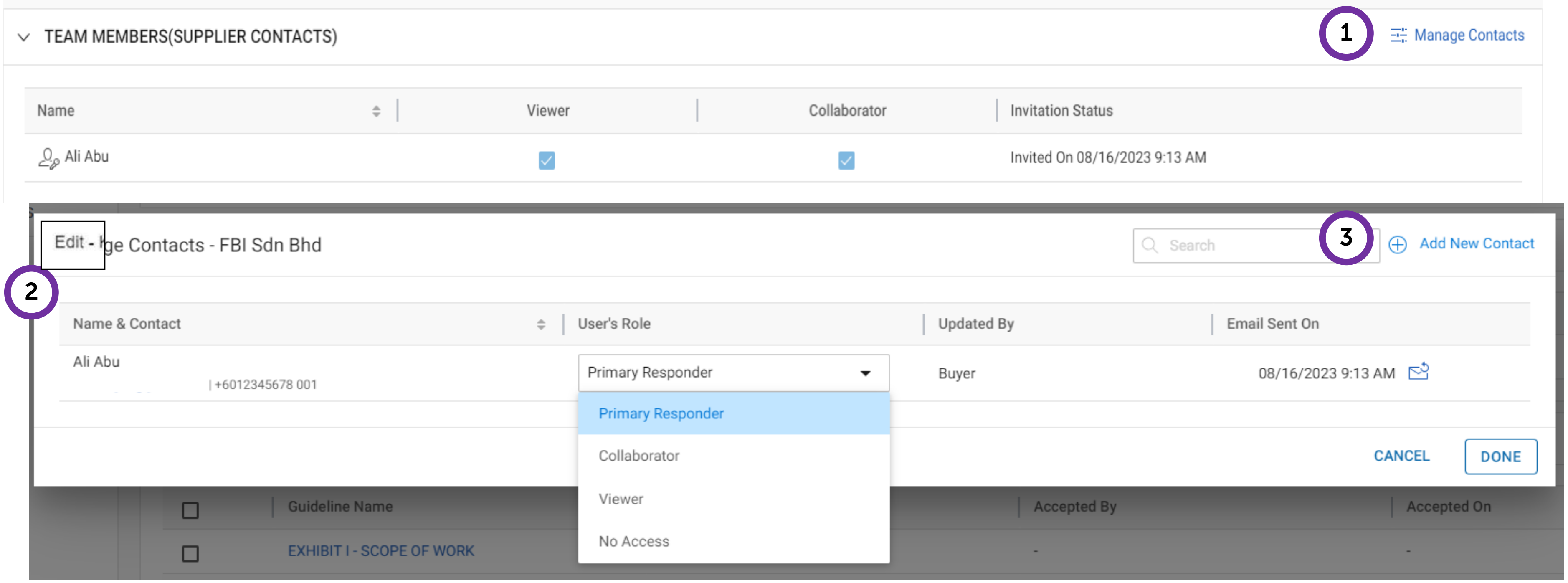
a. Team Members
b. Contract Terms
c. Questionnaires
d. Price Sheet
e. Attachments

Suppliers are required to submit their bid response for **each section** outlined in the RFx. If the supplier requires clarification, they may do so via the online Discussion Forum (refer to **Tender Clarification**).

Submit Responses – Team Members

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

You may assign Roles in the Team Members section.



1	Under the '**Team Members**' section, click on the '**Manage Contacts**' icon.
2	The '**Edit**' page will be displayed. Here, you are able to add any current contacts from your company to be a part of this tender. You can also choose the '**User's Role**' to assign specific roles to contacts. Click '**Done**' once completed.
3	You may also add new contact to be a part of this tender.

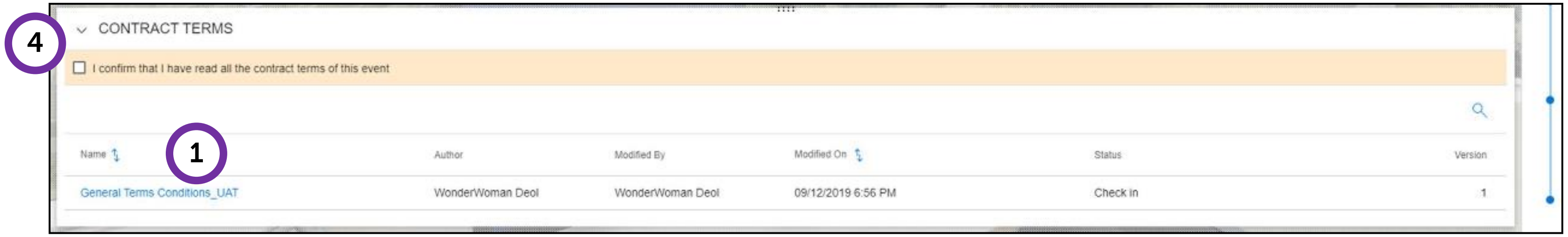
User's Roles include:

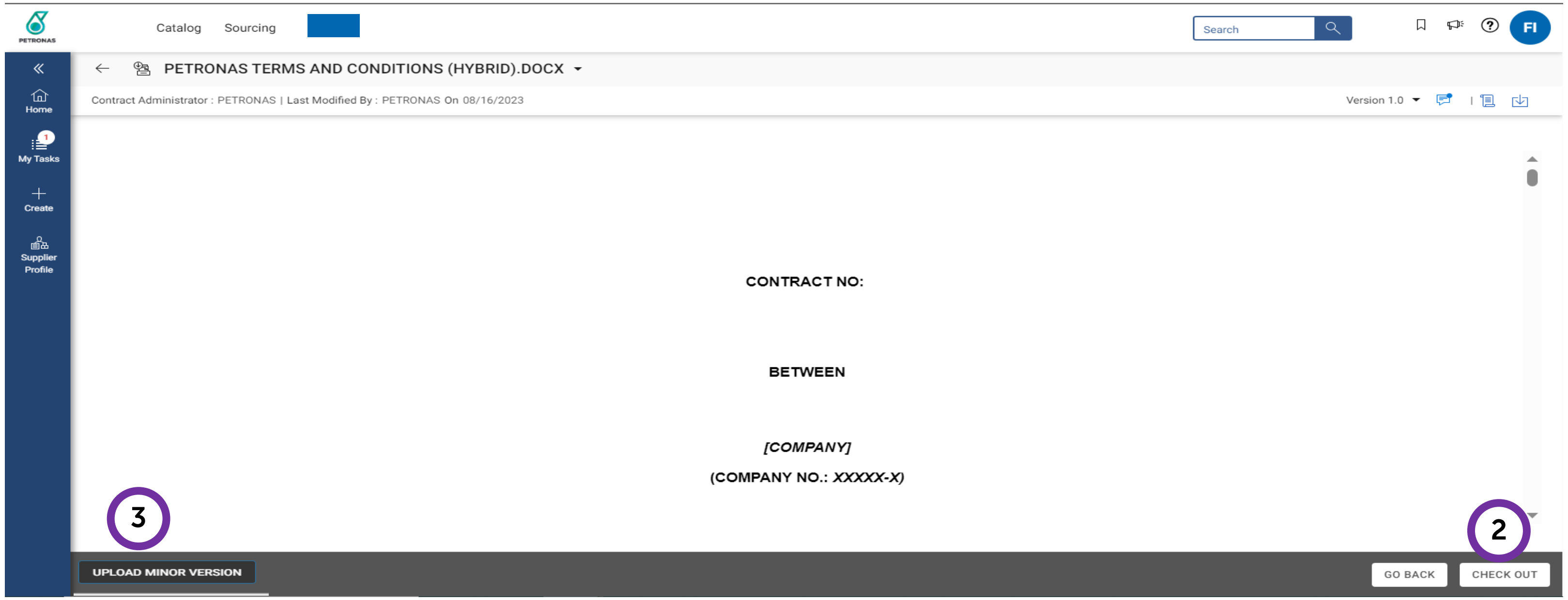
- **Primary Responder:** Primary focal person for the tender
- **Collaborator:** Able to review the tender and make edits
- **Viewer:** Able to view the tender but cannot make any edits
- **No Access:** No access at all to the tender

Submit Responses – Contract Terms

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

You may accept or modify the Contract Terms.





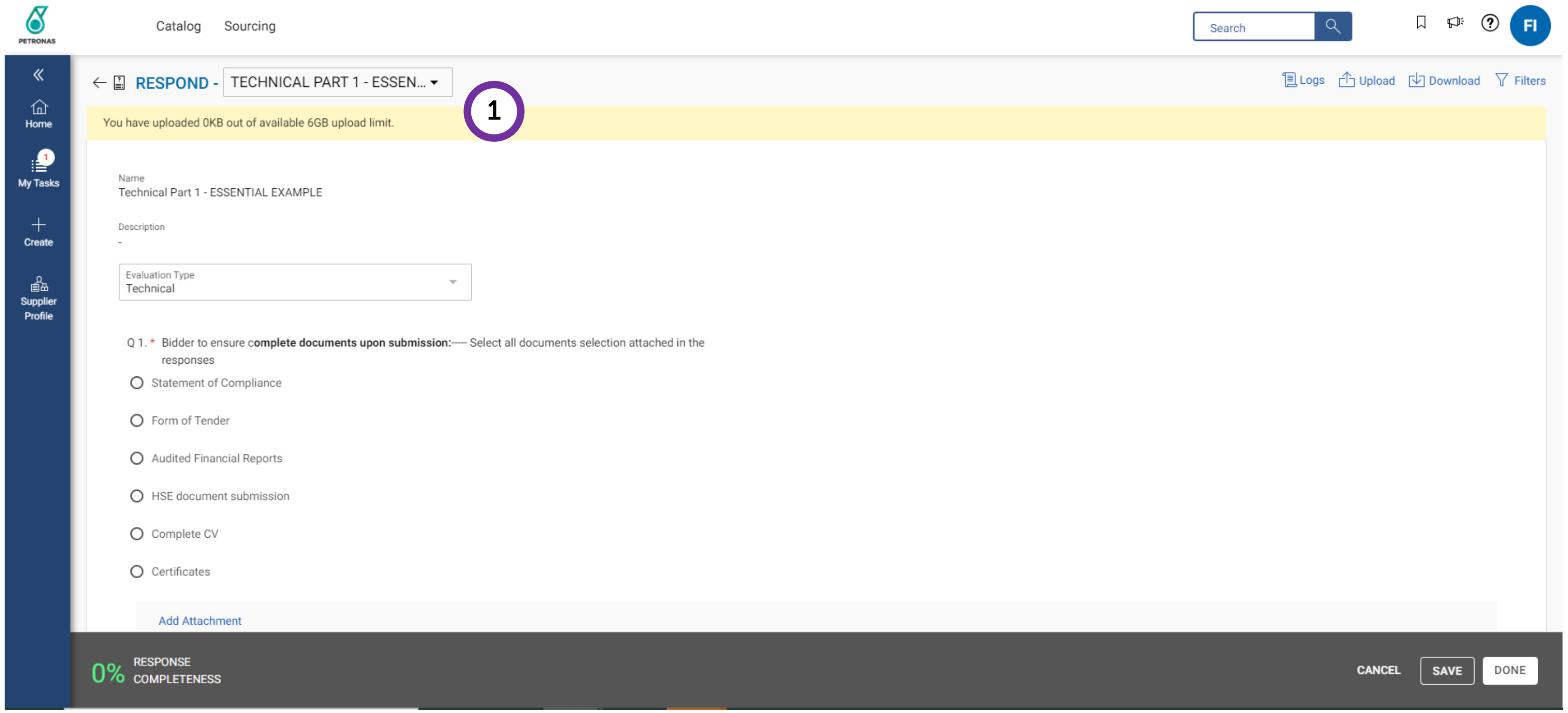
1	Under '**Contract Terms**' section, click on the terms & conditions (T&C) to review and understand the T&C.
2	If you need to perform redlining, **Check Out** the document first. Changes shall be made on the Microsoft version of the document.
3	You will need to '**Upload Minor Version**' of the same T&C document to upload update or proposed modifications. UPLOAD MINOR VERSION Once finalised, click on '**Check In**'.
4	Once completed, return to the main page and check the box to confirm that all contract terms have been read. Note: If the box is not checked, supplier will not be able to submit response.

Redlining is a process where suppliers able to highlight the '**Terms and Conditions**' document areas of clauses that require deviation. Supplier may **add a note** on the MS Word document and reupload the same document. A **new version number** will be generated.

Submit Responses – Questionnaires

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

Suppliers must respond to all questionnaires listed in the section.



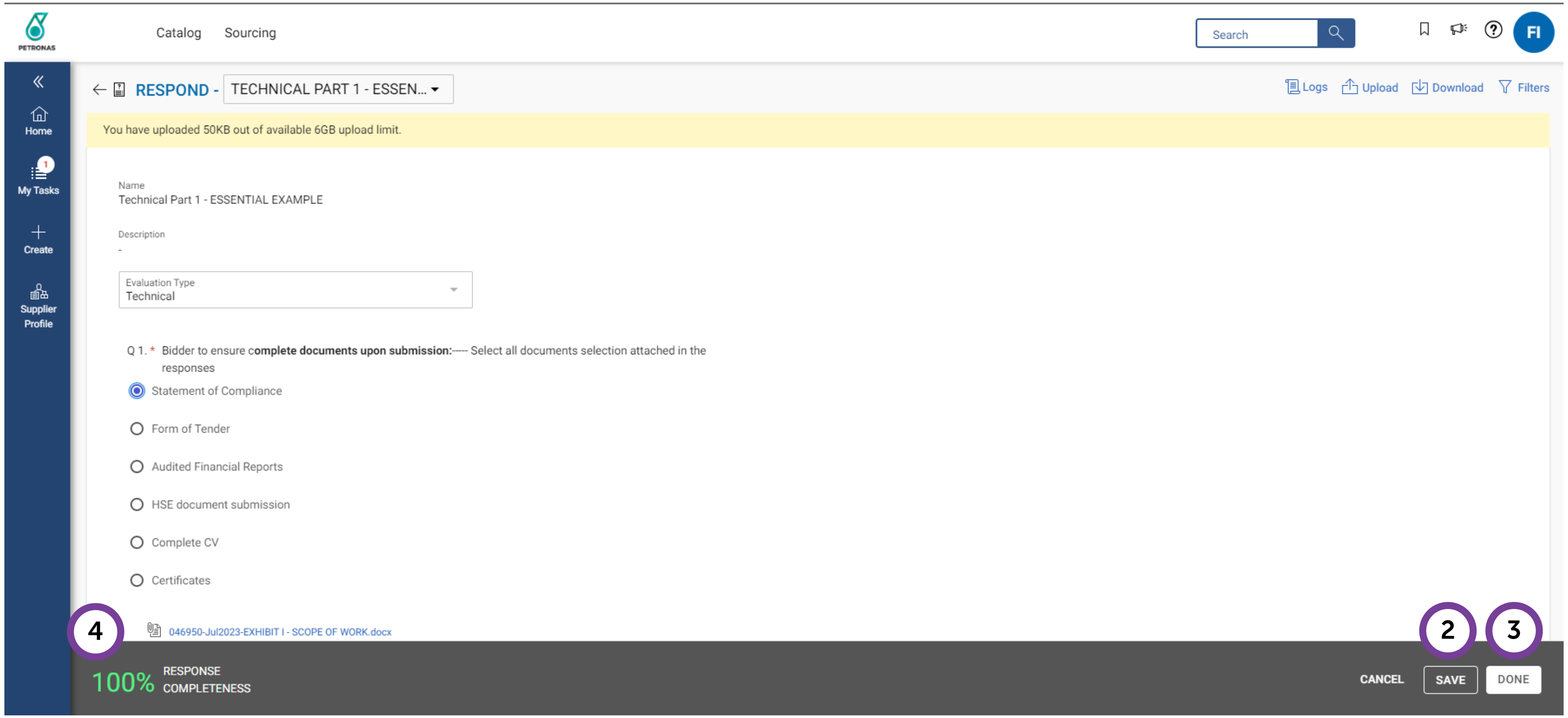
It is the **supplier's responsibility** to ensure questionnaires are reviewed and answered **truthfully and accurately** as PETRONAS buyers will be verifying the information provided.

1	Select the questionnaire from the drop-down list: • The questions may vary in format (i.e. Radio Button, Check Box, List Box, Drop Down). • Suppliers must select answers which are related to their capability of delivering goods and services. • Some questions may require detailed explanation (i.e. Free Form text) and may need to provide attachments. • If attachment is required, kindly do not add attachments more than 2GB for each question in this questionnaire section. • For attachments that are larger than 2GB, place them in attachment section (refer to page 56).

Submit Responses – Questionnaires

1 Access RFx Event – 2 Accept Guidelines – **3 Submit Responses** – 4 RFx Status

Suppliers must respond to all questionnaires listed in the section.



2	Respond to questions, then click '**Save**'.
3	Once all the questions have been responded, click '**Done**'. Respond to all other questionnaires in similar manner. Click '**Submit Response**' once all questionnaire has been answered. Confirmation window will then appear. Click '**Yes**'.
4	The completion rate of the supplier profile can be tracked here.

Submit Responses – Price sheet

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

The price sheet represents the commercial aspect of the tender submission and may vary from one tender to another.

Suppliers will have the option to respond to the tender's commercial requirements through the following channels:

a. **Update Price sheet via the GEP SMART user interface, or**

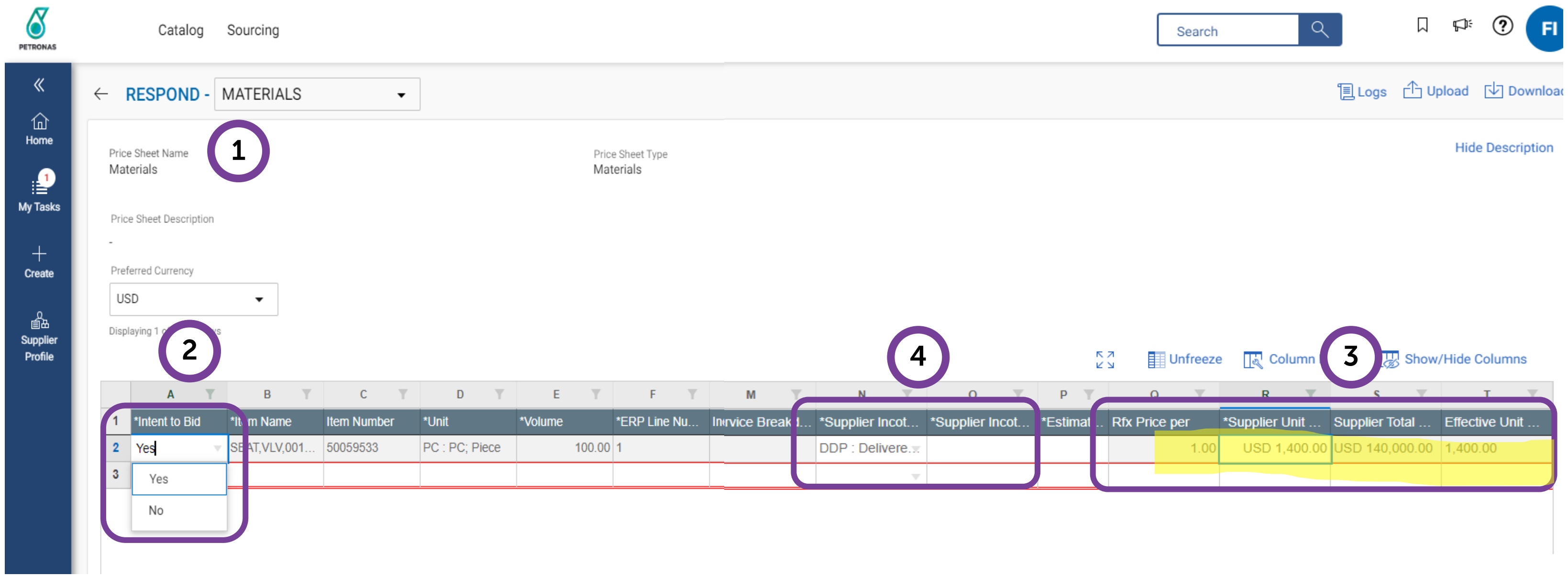
b. **Update Price sheet through MS Excel upload.**

It is the supplier's responsibility to **verify all details in all columns** within the price sheet. Columns may differ based on the Tender requirements from PETRONAS.

Submit Responses – Price sheet

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

a. Update price sheet via the GEP SMART user interface.



1	Scroll to the **Price Sheet** section. Click on the **Price Sheet Name.** Note: The Price Sheet represents the commercial aspect of the RFx, suppliers are responsible to ensure that the pricing is accurate.
2	Review all columns and rows. Respond '**Yes/ No**' in the '**Intent to Bid'** column.
3	Enter the unit price for each line item that has been marked '**Yes to Bid**'. Once unit price for all line item is entered, click '**Done**'. Note: For full item description, please refer to the Item Specification field instead of Item Description field. Respond to all the Price sheets in a similar manner, then click on '**Submit Response**'. The confirmation window will appear. Click on '**Yes**'.
4	Supplier to key in all mandatory fields i.e., Supplier Incoterm Code, Supplier Incoterm Location, and Estimated Lead Calendar Days for Material Lines only. For Service Lines these fields are non-mandatory. Note: Supplier can only fill in numerical value for Estimated Lead Calendar Days.

The price sheet displayed above is a screenshot taken from within the GEP SMART platform. Suppliers that choose to update the price sheet directly within the platform will have the above view.

Submit Responses – Price sheet

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

b. Update price sheet through MS Excel upload.

1

Price Sheet Name:	Materials										
Price Sheet Type:	Materials										
Description:											
Column Type :	Drop Down	Text	Drop Down	Text	Extended Text (12K	Extended Text (	Currency	Computed	Drop Down	Text	Numeric
Column Name:	*Intent to Bi	Item number	*Unit	Supplie	Item Specificatic	Item Descrip	*Price per ui	Total price(MYR)	*Supplier Incoterr	*Supplier	Estima d Lead Calendar
	Yes	50027195	RM : RM; Ream	1231312313-1	TYPE:LOGO</br>SIZE:SZ A4</br>PACKAGE DETAILS:PK/500SH</br>MANUFACTURER NAME:CNQUER	PAPER,LTRHD,LGO,SZ A4,PK/500SH,CNQUER	MYR 23.00	MYR 23.00	DDP : Delivered Duty	Supplier Code	5
	Yes	50027195	RM : RM; Ream	32131231-2	TYPE:LOGO</br>SIZE:SZ A4</br>PACKAGE DETAILS:PK/500SH</br>MANUFACTURER NAME:CNQUER	PAPER,LTRHD,LGO,SZ A4,PK/500SH,CNQUER	MYR 34.00	MYR 34.00	DDP : Delivered Duty	Supplier Code	3

Suppliers can only **use the downloaded template provided** and not any other format. Suppliers are only permitted to **provide input on certain fields**, the rest are locked.

1 You can opt to submit the price sheet via the MS Excel template provided.

The template can be found at the top right corner of the tender page. Click the download icon.

Upon download, you are required to fill in the unit price in the Excel and upload it back to the system.

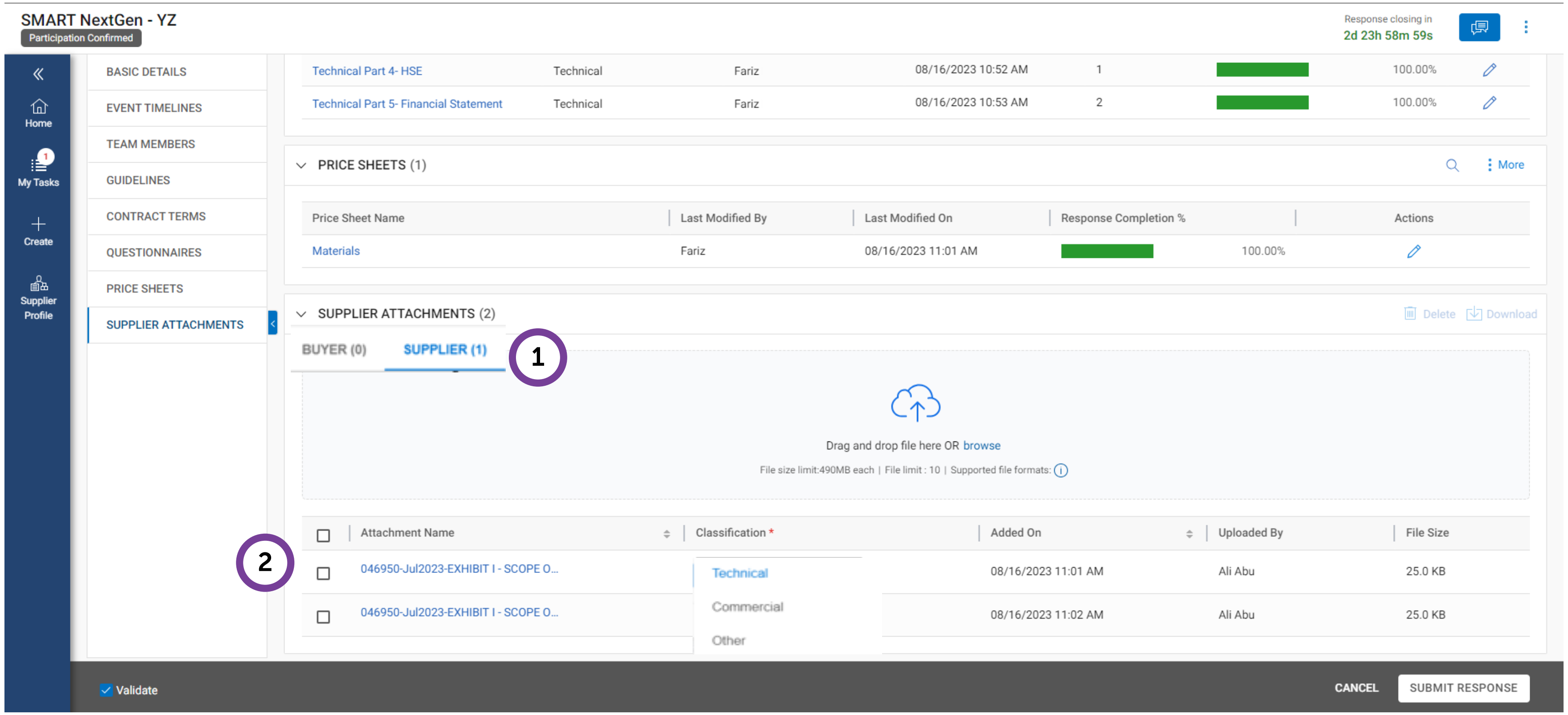
Note:

- Supplier to key in all mandatory fields i.e., Supplier Incoterm Code, Supplier Incoterm Location, and Estimated Lead Calendar Days for Material Line only.
- For full item description, please refer to the Item Specification field instead of Item Description field.
- Suppliers are to ensure that the price sheet uploaded is successful.
- Upon completion, a message will appear indicating 'Upload Successful'.

Submit Responses – Supplier Attachments

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

In this section, suppliers can provide and review attachments for supplementary documentation.

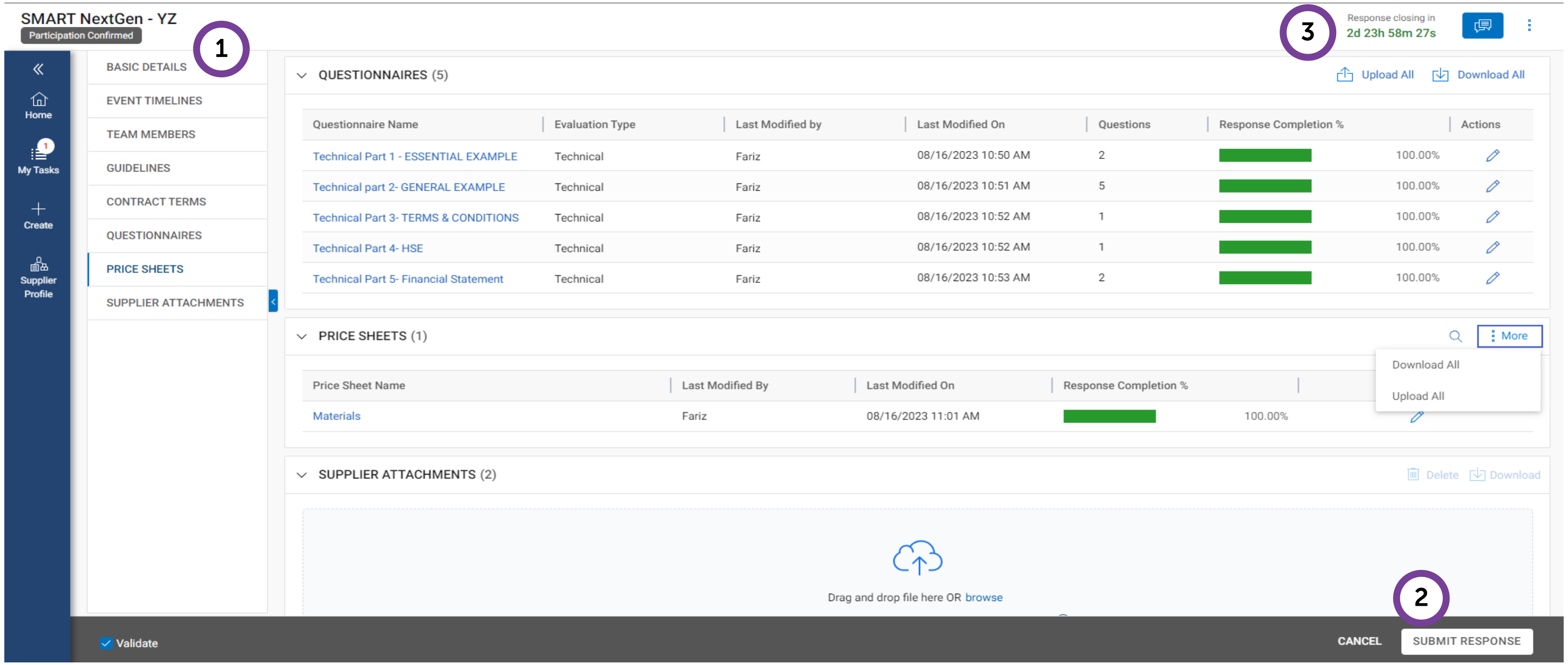


1	Under the '**Supplier**' section, you can attach documents related to the RFx/ Tender (i.e. CV, ITB documents, alternative specs, product specs, etc.). You will need to select the attachment if it's a **Technical or Commercial** form of attachment. Please ensure that all the attachments with Pricing matters are marked as '**Commercial**' Attachments.
2	Under the '**Buyer**' section: • You will be able to view and download attachments that have been provided by the PETRONAS representative. • It is compulsory to view all these attachments prior to bid submission. • You may see comments from Buyer, if any, at the Attachments section.

Submit Responses Overview

1 Access RFx Event — 2 Accept Guidelines — 3 Submit Responses — 4 RFx Status

Upon accepting the tender guidelines and providing all the required information, supplier is ready to submit their RFx response.



1	Once all sections of the Tender documents have been completed, suppliers need to ensure that all details are accurate in accordance to the guidelines (RFx).
2	Once this has been checked and confirmed, click '**Submit**' to submit the bid response. Once submitted, the document status will show as '**Response Submitted**'.
3	You can resubmit responses by first withdrawing response and only if response timeline is still open. Once the Response Timeline status changes to '**Closed**', the system will not allow any more submissions.

It is the Supplier's responsibility to ensure that they plan and submit their responses for the Tender **in advance before the response closing date**, to avoid losing out any opportunities to participate. The system will not permit any submissions once response date closes.

RFx Status

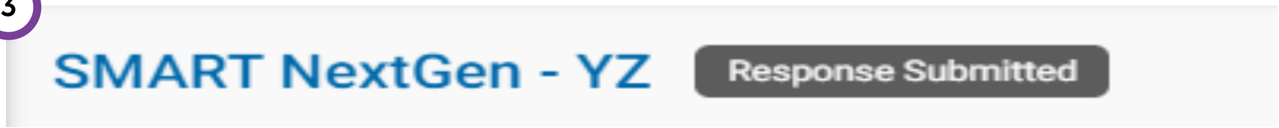
1 Access RFx Event – 2 Accept Guidelines – 3 Submit Responses – 4 RFx Status

The RFx status will change based on the action completed by suppliers or action initiated by buyers.

1

2

3



1	**RFx Withdrawn** The RFx is still active, the status could be due to: • Possible amendment to the requirements (i.e. Changes in scope or tender requirement), • Addendum made to the RFx or tender.
2	**RFx Cancelled** • The RFx is currently inactive and this status will be initiated by the sourcing execs or buyer. • You will be notified that the tender has been aborted/ dropped via email notification.
3	**RFx Submitted** The RFx or tender is active, the status will be considered as submitted once you complete the guidelines and RFx responses.

Application Deep Dive

Tender Clarification

The discussion forum will be the primary means of communication for tender clarification as well as the avenue for document sharing (update) post bid closing date.

Learning Objectives

Suppliers will be able to authenticate details on technical and commercial requirements, review and document them through the system for reference.

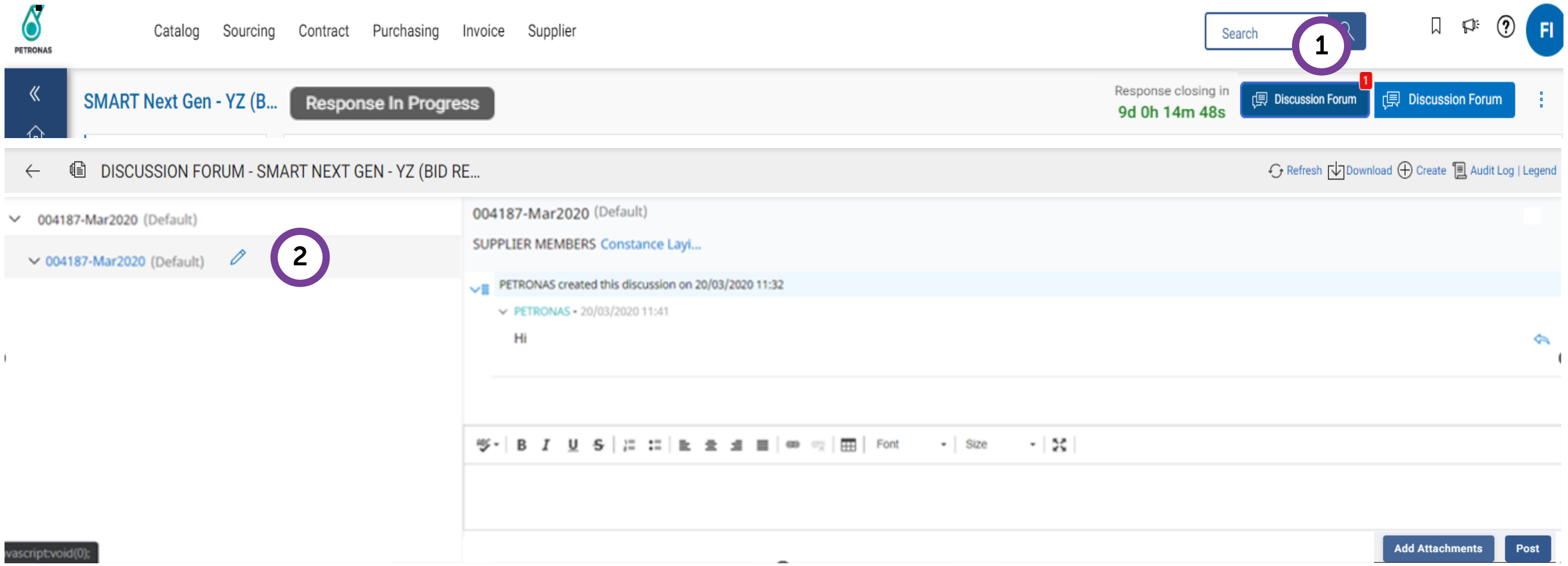
1 — **Discussion Before Bid Closing**

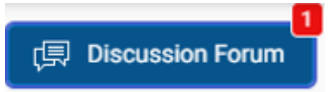
2 — **Discussion After Bid Closing**

Discussion Before Bid Closing

1 Discussion Before Bid Closing — 2 Discussion After Bid Closing

Any queries or clarifications required with regards to the tender shall be communicated through the Discussion Forum in GEP SMART.



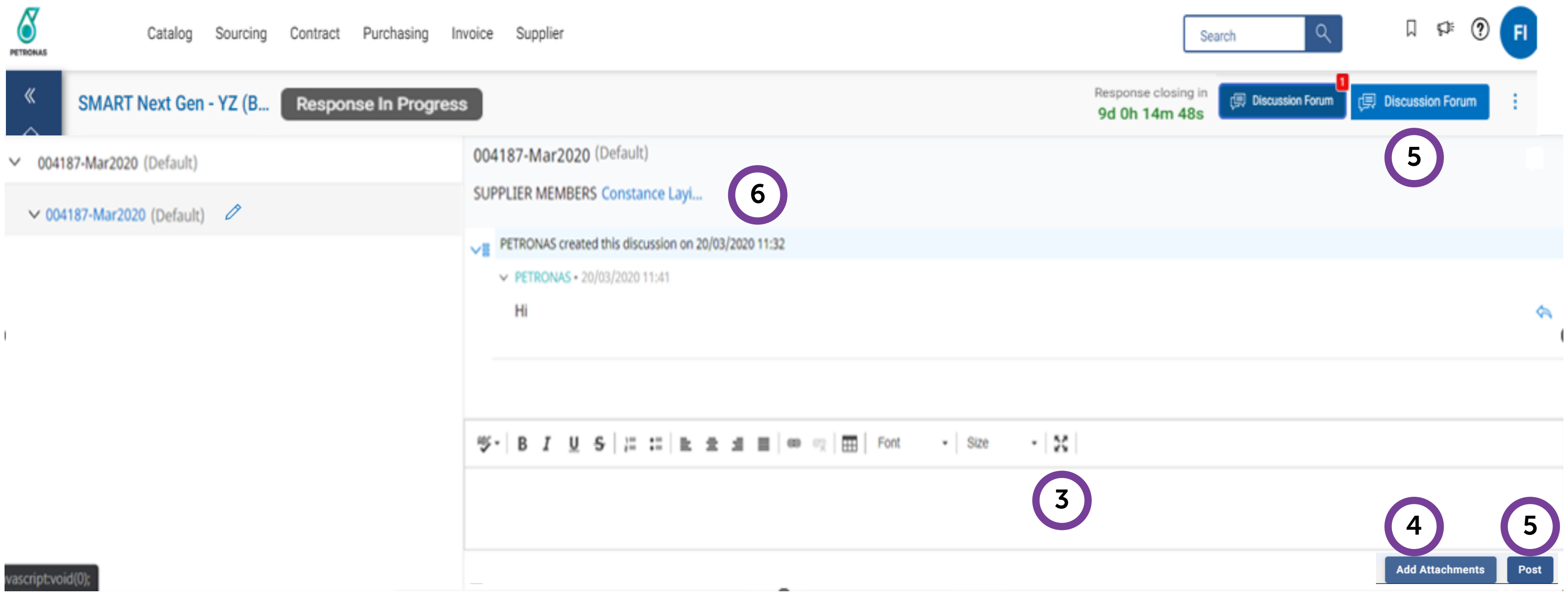
1	Initiate your query through the '**Discussion Forum**' icon on the top right corner. The group discussion window pop up will be displayed.  If you receive any notification from the Buyer, a numbered notification will appear on top of the icon.
2	In the window pop up, amend the discussion title accordingly by clicking on the 'Pencil' icon.  Note: there may be some discussions that have already been posted in the forum by a PETRONAS representative. Refer to those discussions for potential technical/tender clarifications, related updates and briefings on tender content.

- Suppliers are urged to use the Discussion Forum as the **only means of communication** and make amendments to bid responses **before bid closing date**.
- All queries **shall be responded** by respective buyers or sourcing execs, whilst being **documented** and **contractually binding**.

Discussion Before Bid Closing

1 Discussion Before Bid Closing — 2 Discussion After Bid Closing

Any queries or clarifications required with regards to the tender shall be communicated through the Discussion Forum in GEP SMART.



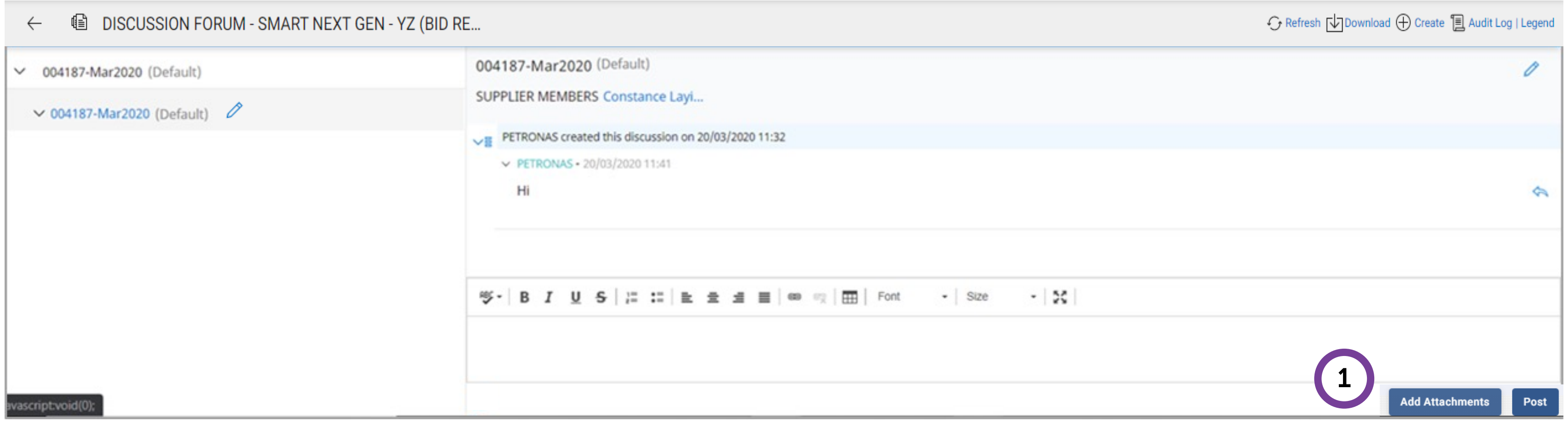
3	Enter the query in the text box at the bottom of the screen.
4	To add in attachments, click on the '**Add Attachments**' icon at the bottom right corner of the text box. **Add Attachments**
5	Once finished, click '**Post**' to send the query. You are urged to use discussion forum to communicate with PETRONAS regarding the specific RFx/Tender. This should be the only means of communication.
6	You can also see your team members who are involved in this RFx/tender next to the 'Supplier Members' line.

Suppliers to submit query using Discussion Forum and make amendments to RFx bid responses in the event the response timeline (bid closing date) is open.

Discussion After Bid Closing

1 Discussion Before Bid Closing — 2 Discussion After Bid Closing

Any action after bid closing (i.e. negotiation) will be initiated by the buyers or sourcing execs.
Changes to the initial bid submissions will be documented through the Discussion Forum.



1	In the event there are amendments or updates to the RFx bid responses **after bid closing date,** you are required to attach the relevant documents (e.g. certifications, company information etc.) into the discussion forum.

Suppliers will **not be able to modify** their bid submissions **after bid closing date**. Any amendments or modification required to the responses shall be done **through the Discussion Forum via document attachments**.

Application Deep Dive

Commercial Resubmission

GEP SMART enables the revision of commercial submission through the initiation of auction and pricing resubmission during the tendering process.

Learning Objectives

Suppliers will be able to partake in the negotiation process for the revision of commercial requirements post initial bid submission.

1

Pricing Resubmission

Pricing Resubmission

Supplier will receive an email notification upon Officer in-charge (OIC) invites for negotiation/commercial re-submission request.

From: smartnotification@petronas.com.my
Sent: Thursday, February 22, 2024 9:22 AM
To:
Subject: Update Alert - Feedback for Event - 055547-Feb2024

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi **Y Z**,

PETRONAS has changed the feedback timeline for the event **"055547-Feb2024"**. The revised timeline is given below:

- Response Feedback Start Date & Time - **21/02/2024 03:30:00 PM Singapore Standard Time**
- Response Feedback End Date & Time - **22/02/2024 09:40:00 AM Singapore Standard Time ?**
- **Remarks - No remarks were added**

? **Chemicals Malaysia PHCO : 001* - ALL Cost Centres**

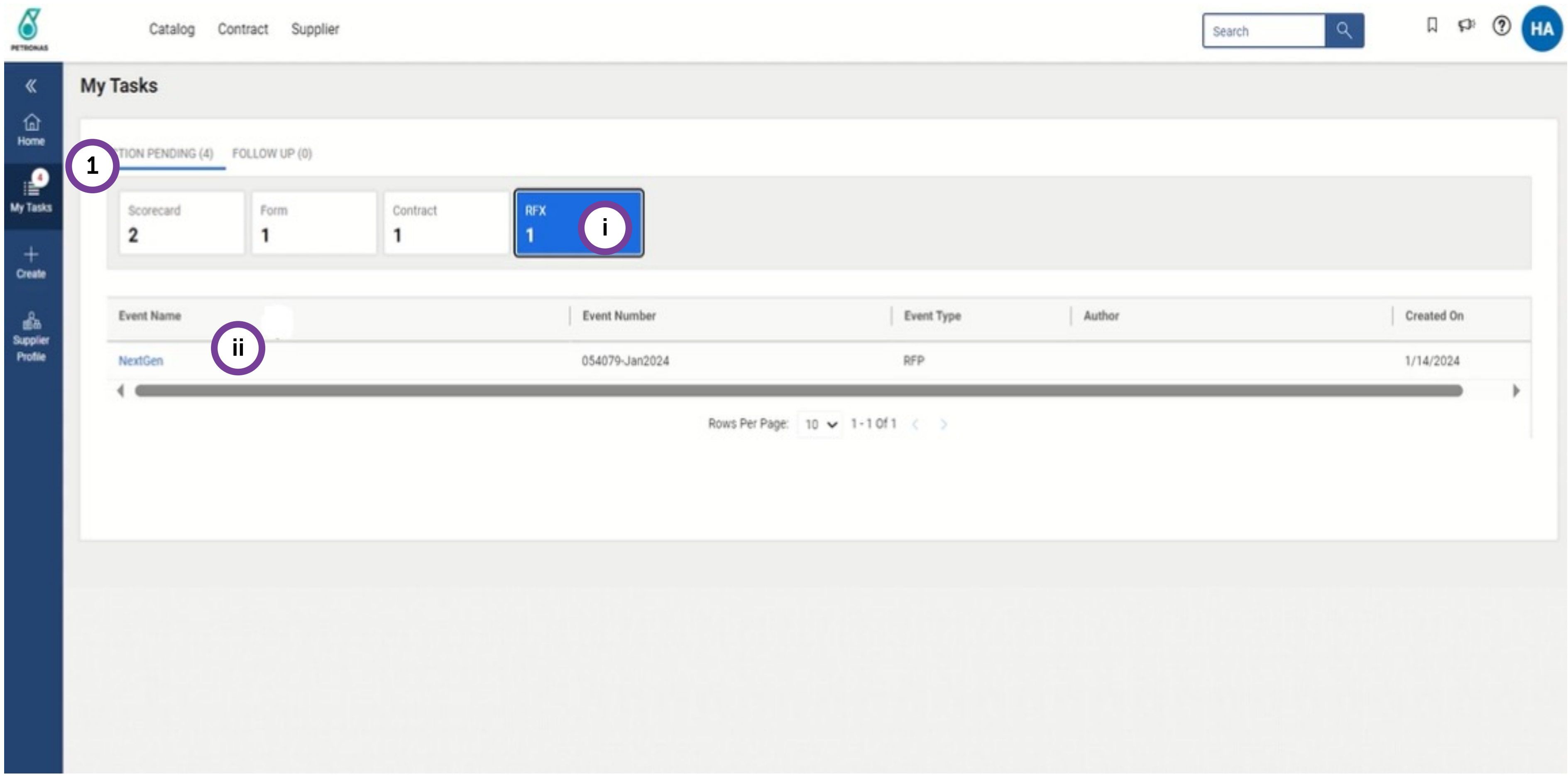
Please contact PETRONAS for any clarifications.

Regards,

PETRONAS

Pricing Resubmission

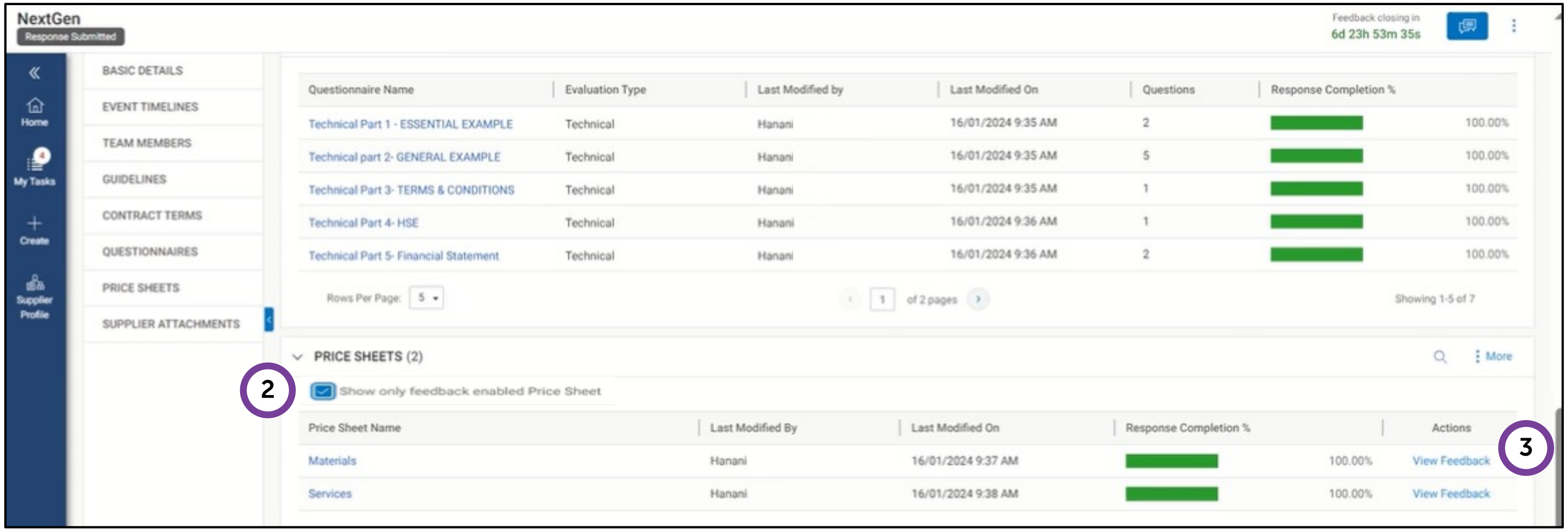
In the event where buyers perform negotiation to commercial response, suppliers will be required to resubmit their pricing.



1	To resubmit new prices, log into GEP SMART. From the homepage, under the '**Action Pending**' list, click "RFx" (i) tab and **select the tender** (ii) that needs to be responded.

Pricing Resubmission

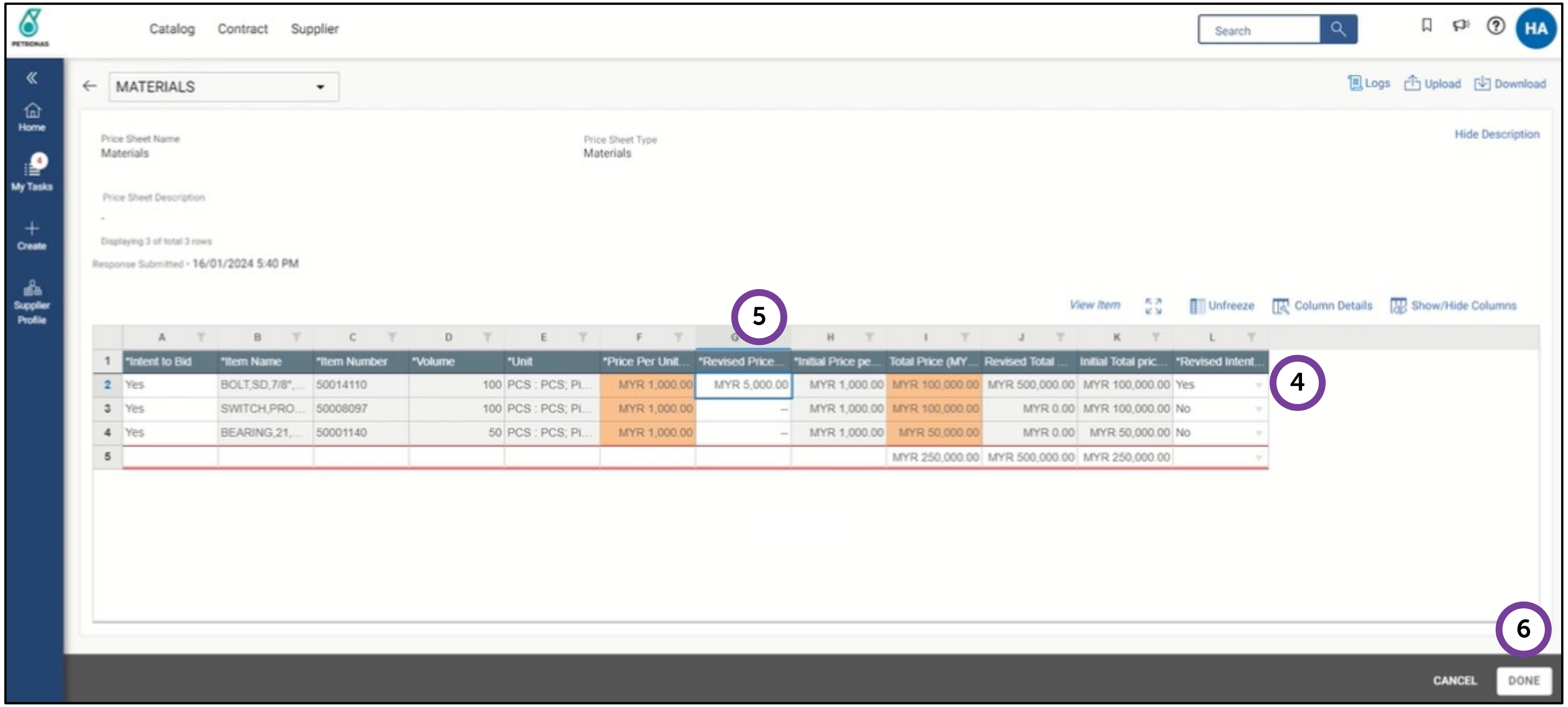
In the event where buyers perform negotiation to commercial response, suppliers will be required to resubmit their pricing.



2	Under the Price Sheets section, check the "**Show only feedback enabled Price Sheet**" to view the enabled column from price sheet document.
3	Click on **View Feedback** from the price sheet document.

Pricing Resubmission

In the event where buyers perform negotiation to commercial response, suppliers will be required to submit their pricing.

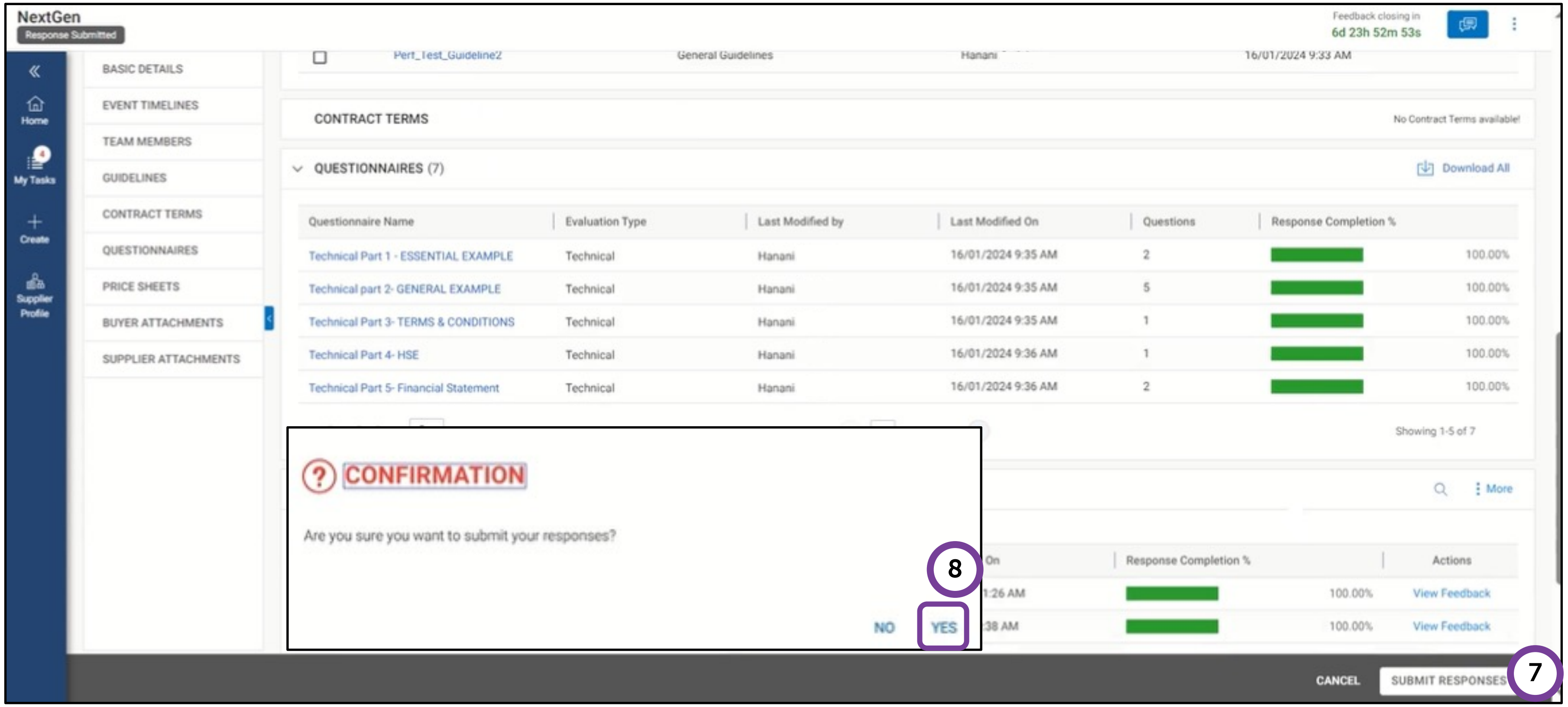


4	At **Revised Intention** column, kindly change the status as **"Yes"** if supplier wish to change the price
5	Enter revised price if desired by the Supplier or as per agreed with PETRONAS at **Revised Price** column. Click '**Done**'.
6	Once complete, click "**Done**" button.

- During the Feedback Timeline, prices that are to be revised will be highlighted in colour by the Officer in-charge of the Tender and you will be informed by each colours' meaning in the Discussion Forum. You will also receive an email notification for this update.
- All identified suppliers will be notified on the colour definition and the revised prices requirements by PETRONAS.

Pricing Resubmission

In the event where buyers perform negotiation to commercial response, suppliers will be required to resubmit their pricing.



7	Click ‘**Submit Responses**’ once supplier has completed.
8	Confirmation notification will appear and click “**Yes**”.

Application Deep Dive

Letter Of Award Acceptance

The discussion forum will be the primary means of communication for tender clarification as well as the avenue for document sharing (update) post bid closing date.

Learning Objectives

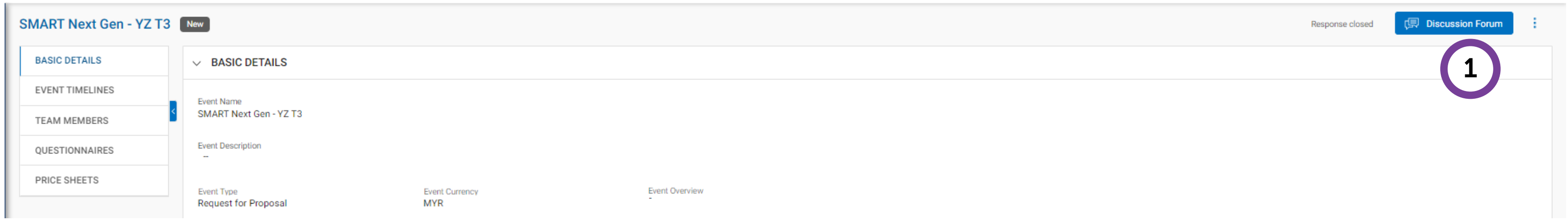
Suppliers will be able to authenticate details on technical and commercial requirements, review and document them through the system for reference.

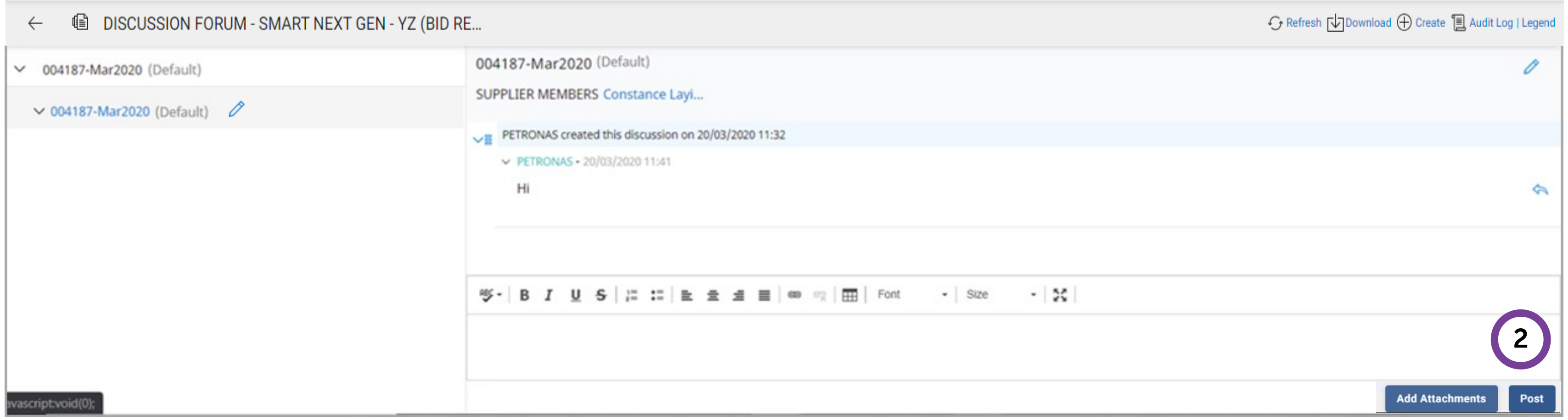
1

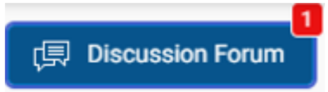
LOA Acceptance

LOA Acceptance

Supplier to acknowledge their acceptance of award via the online Discussion Forum.





1	Upon successful evaluation, supplier will be notified via email together with the issuance of Letter of Award (LOA). Respective Buyer/Author will then prepare a topic in the Discussion Forum on LOA Acceptance to be directed to the Awarded Supplier. Click on the '**Discussion Forum**' icon on the top right corner of the RFx page. 
2	Successful supplier is required to respond in the Discussion Forum, upon receipt of LOA document from PETRONAS to confirm acknowledgement and indicate acceptance. Click '**Post**' to complete the LOA acceptance.

Application Deep Dive

Contract Management

GEP SMART provides a central repository to give you visibility of contract status and upload additional notes and attachment for the contract.

Learning Objectives

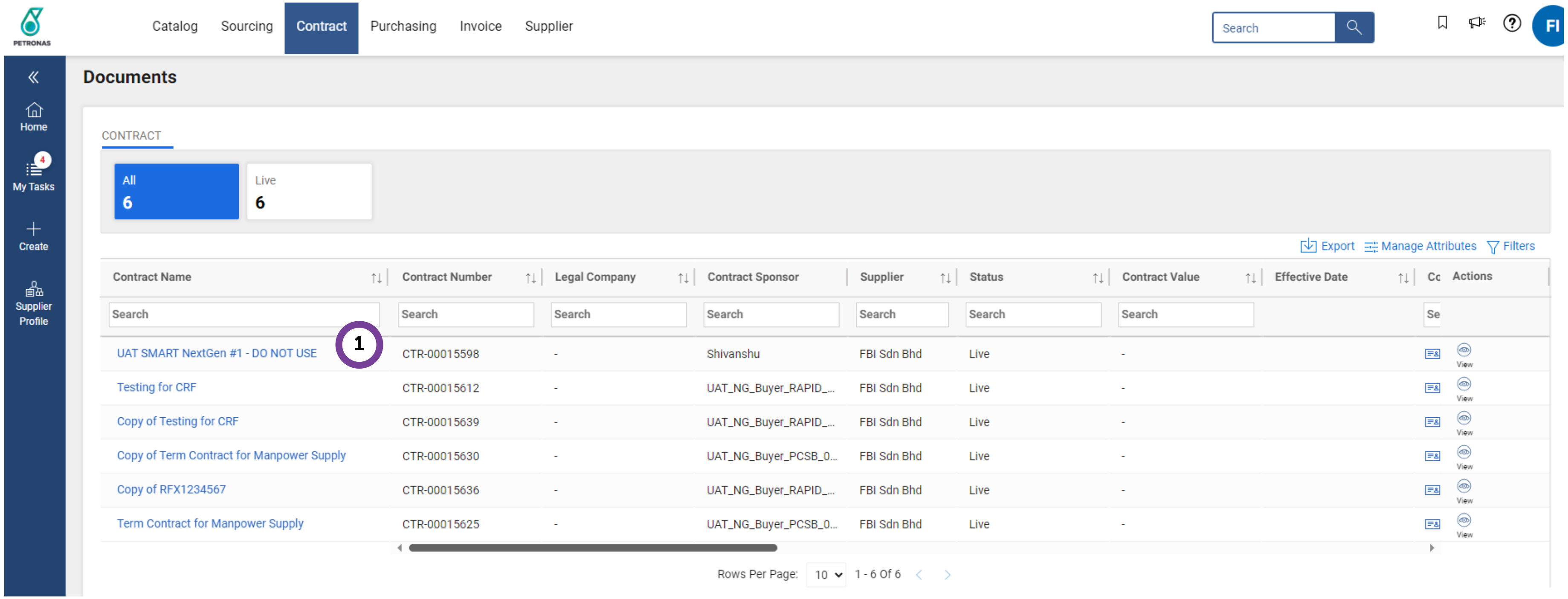
Suppliers will be able to search and view their awarded contracts in the system as well as upload relevant attachments.

1. Access Contract Repository
2. Upload Notes, Attachments & Links
3. Respond to Contract Obligations
4. Using The Discussion Forum
5. Update Supplier Contact Information

Access Contract Repository

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Supplier can navigate to the contract repository from the Home Page.

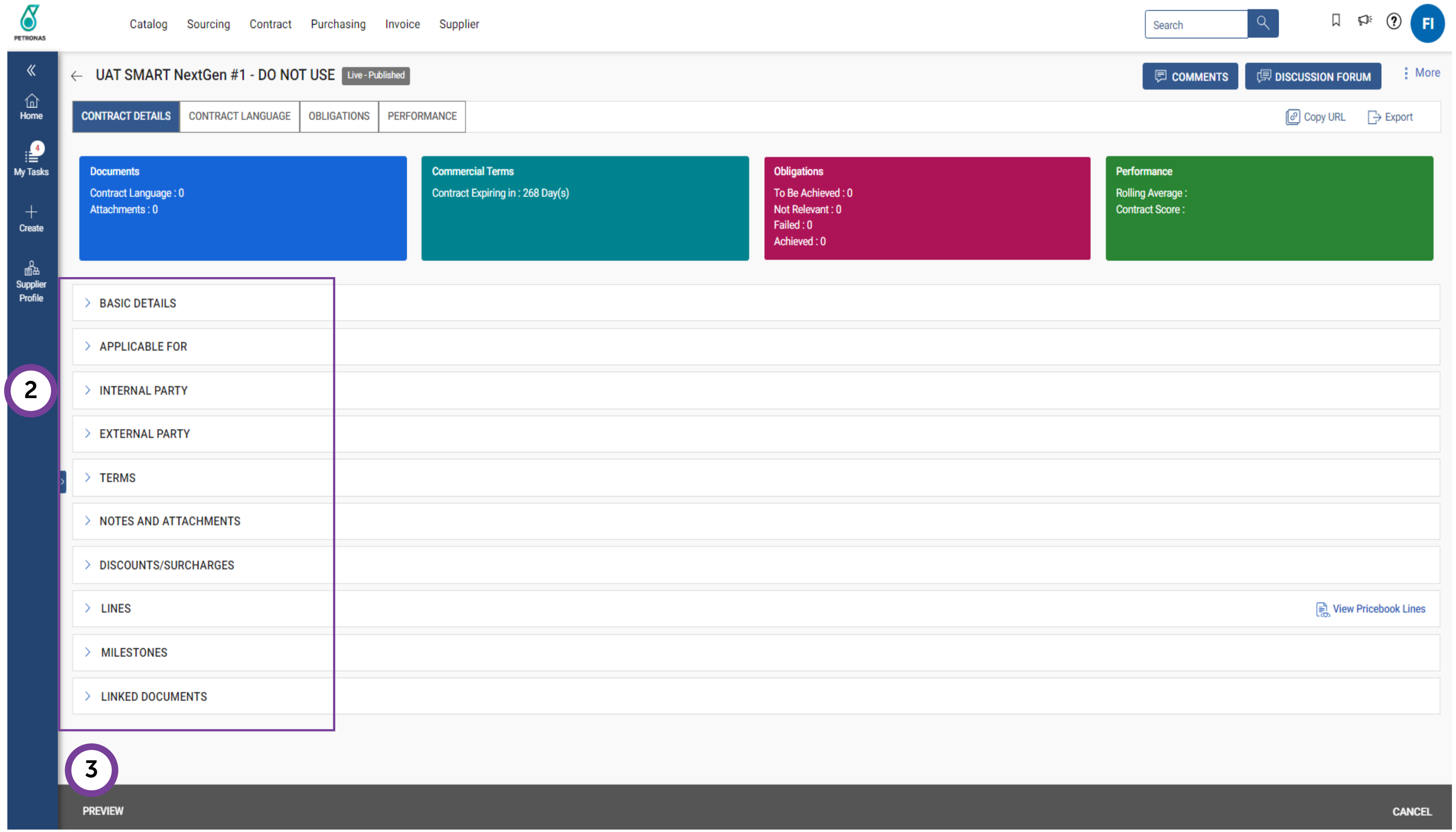


1	At the Home Page, under **Contract** tab, list of contract that has been awarded to you will be listed down. To view the contract detail, click the URL link from **Contract Name** column.

Access Contract Repository

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Supplier will be able to access the awarded contract and view the contract details.

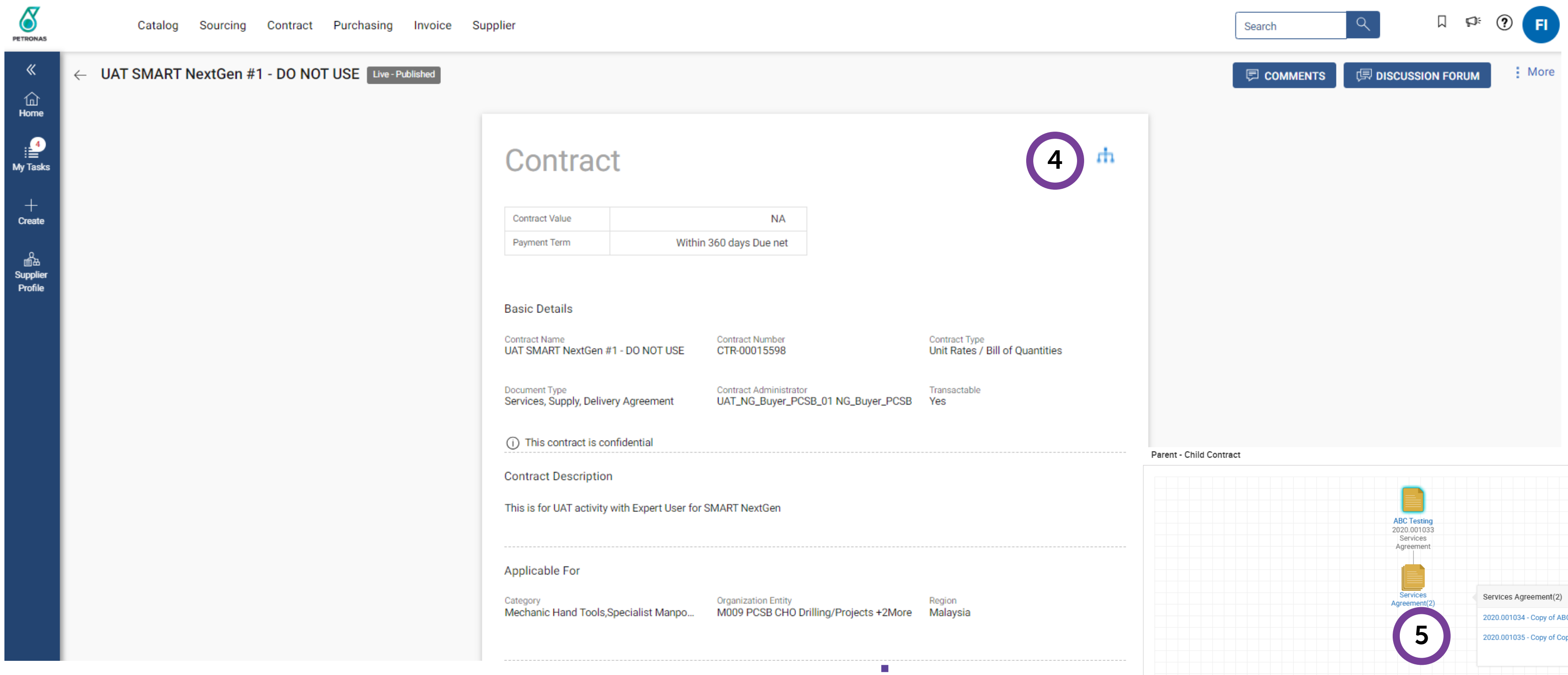


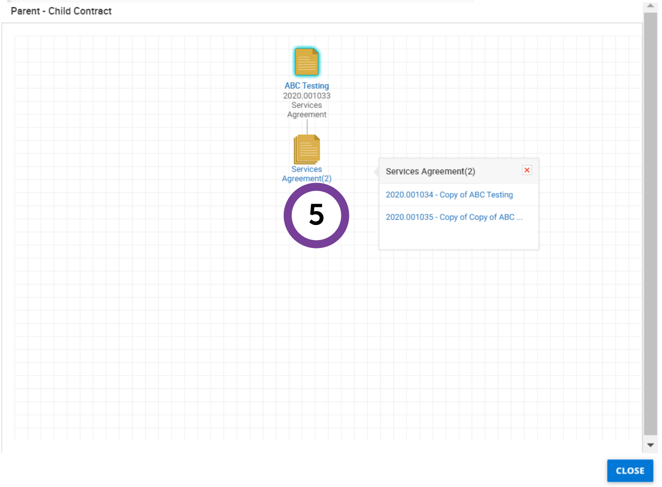
2	Each section can be expanded for the details. Key sections: • **Terms:** displays the contract duration • **Applicable For:** displays the Buyer list/ OPU who will consume the contract • **Contract Language:** displays the agreed contract document details • **Lines:** - displays schedule of rate/ Pricebook
3	Click '**Preview**' to view the contract hierarchy/linked contract being established (if any).

Access Contract Repository

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Supplier will be able to access the awarded contract and view the contract details.





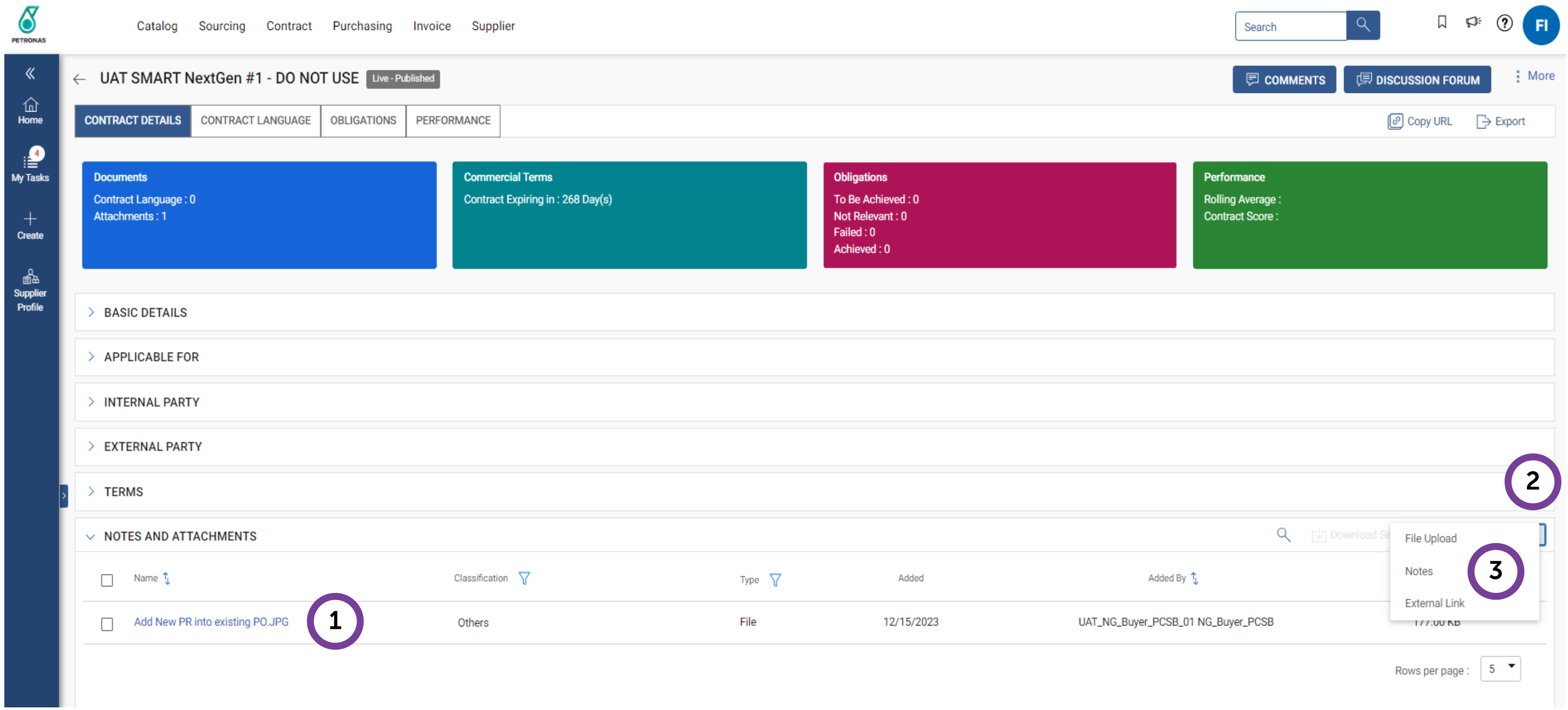
Display of established linked contract

4	Click on **Contract Hierarchy** Icon to view the linked contract (if any). *Note: Linked contract(s) represent the individual contract derived from main contract.*
5	For the example shown, there are two sub-contracts derived from the main Contract.

Upload Notes, Attachments & Links

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Supplier will be able to upload additional notes, attachment or external link for the awarded contract.



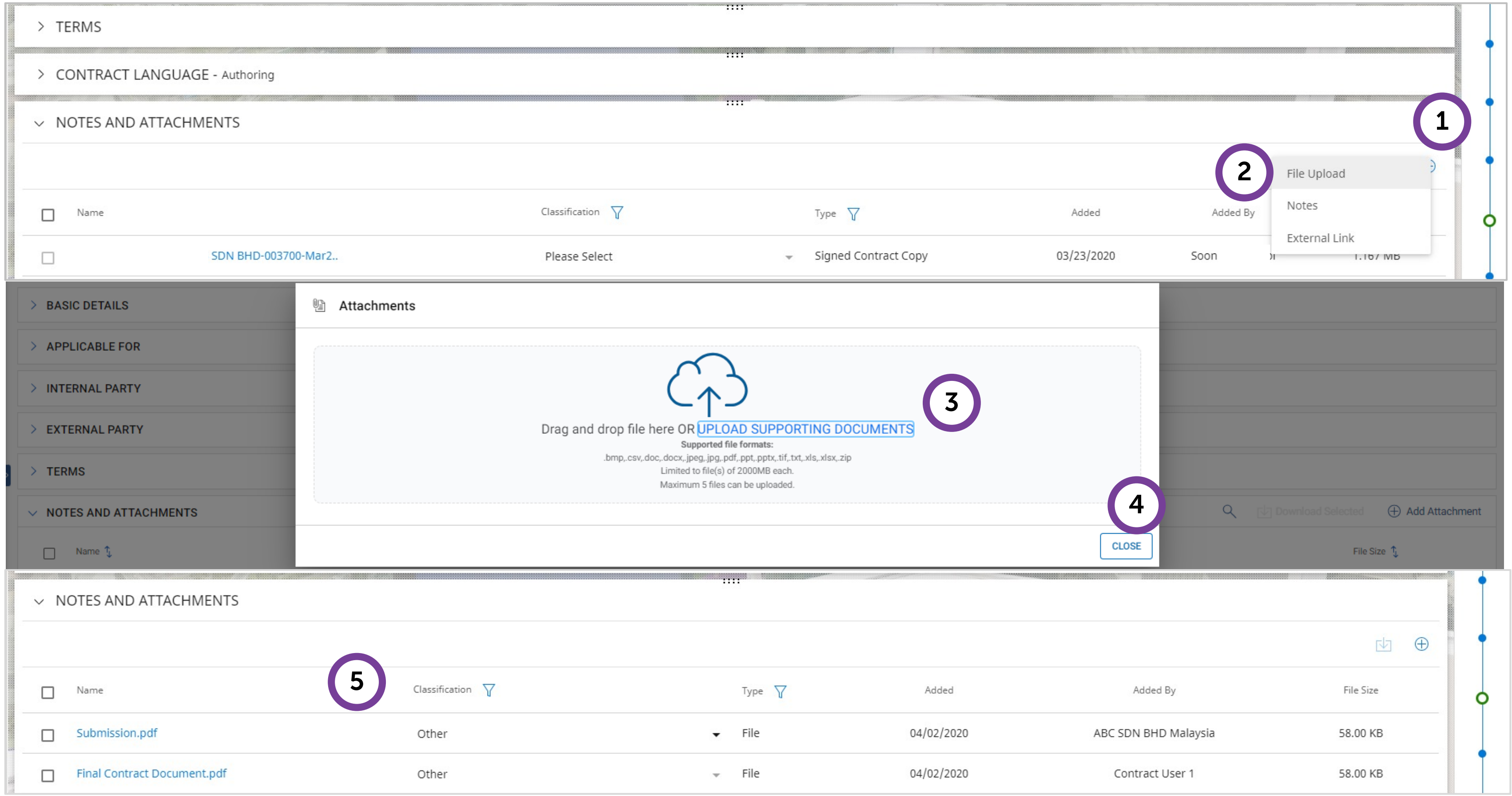
1	Under Notes And Attachments, you can view any notes and attachments made visible to you. You may also upload your own notes, attachments or external links here.
2	Click on ⊕ to upload any notes, attachment or external link.
3	Select the relevant action i.e. • **File upload**: to upload an attachment • **Notes**: to create a note • **External Link**: to capture any relevance link

This section is only meant to capture any final notes and attachments that are applicable for this Contract.

Upload Notes, Attachments & Links

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Uploading attachments.

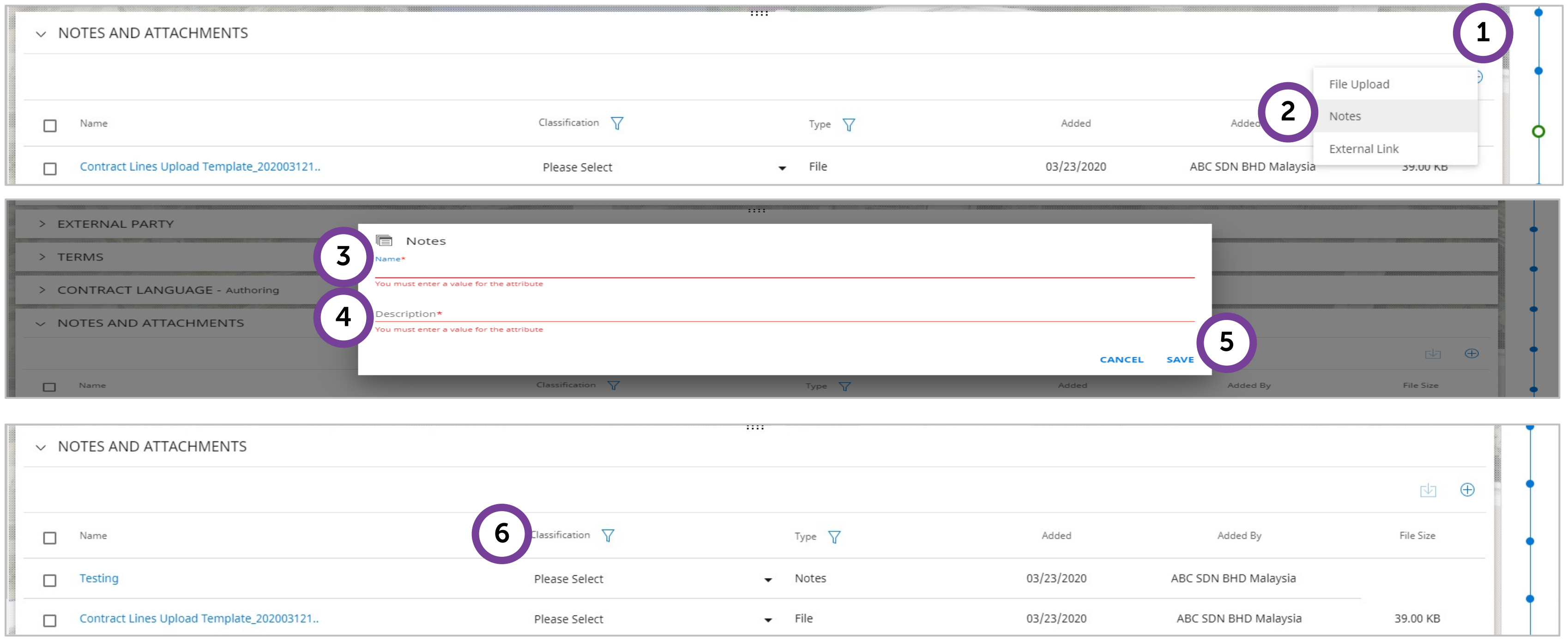


1	Click on ⊕ to upload any notes, attachment or external link.
2	Select **File Upload** to upload an attachment.
3	Select **Upload Document** to insert the relevant document.
4	Click **Close** once document completed upload.
5	Select '**External: Document from Supplier**' from the **Classification** drop-down for the uploaded document.

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Upload Notes, Attachments & Links

Creating and uploading notes.

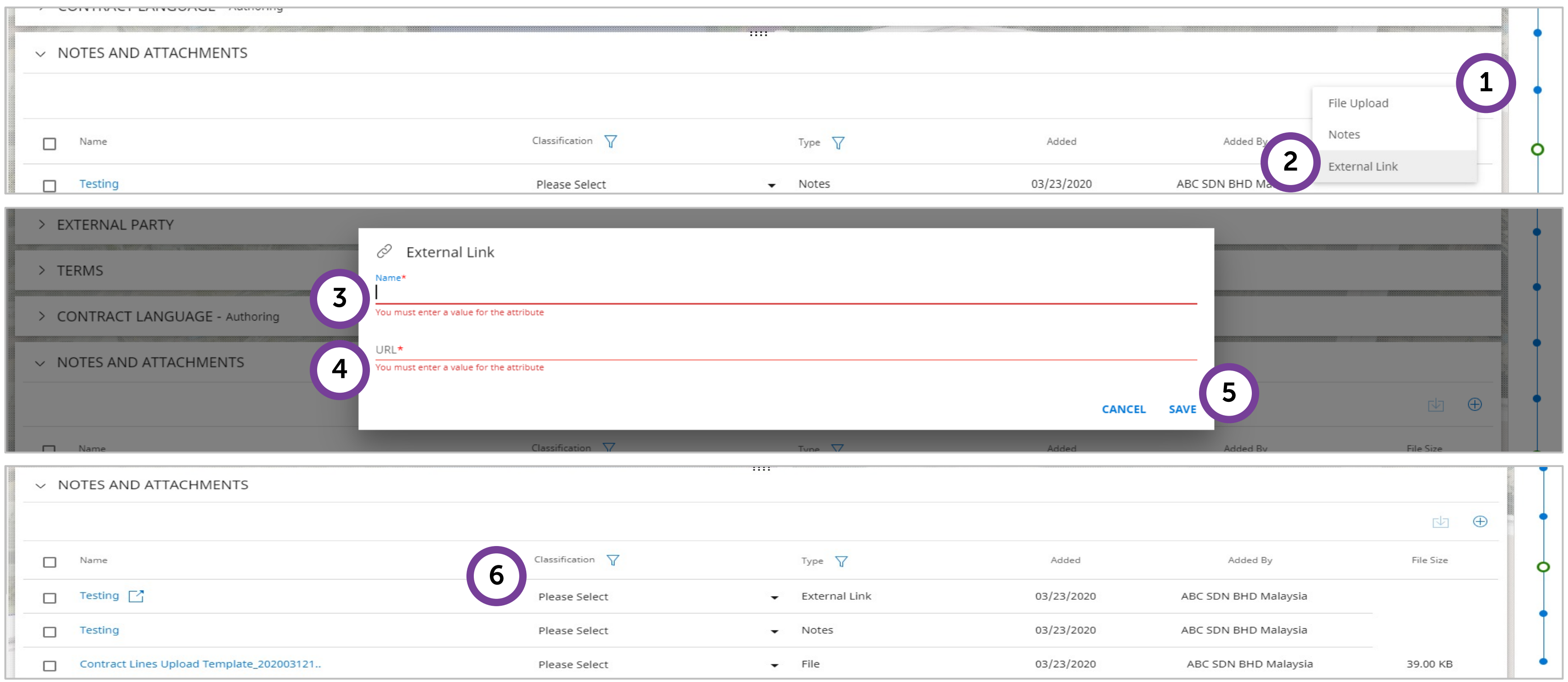


1	Click on ⊕ to upload any notes, attachment or external link.
2	Select **Notes** to create a note.
3	Provide a **Name** for the note.
4	Provide the content of note in **Description**.
5	Click **Save** once complete.
6	Select '**External: Document from Supplier**' from the **Classification** drop-down for the created note.

Upload Notes, Attachments & Links

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Sharing and uploading external links.



1	Click on ⊕ to upload any notes, attachment or external link.
2	Select **External Link** to share any external link.
3	Provide a **Name** for the external link to be shared.
4	Provide the **URL**.
5	Click **Save** once complete.
6	Select '**External: Document from Supplier**' from the **Classification** drop-down for the uploaded link.

Respond to Contract Obligations

Supplier will receive an email notification on the Contract Obligations that need to be responded to.

1

An Obligation associated with the following contract is now in "To Be Achieved" status.

SMART Contract Number : MCTR10000566(Revision 24)

Contract Name.: xx

Supplier : xx

Obligation Name : Insurance - Initial

Obligation Due Date : 07 Jul 2021

- Refer here for the full list of obligations and action to be taken by supplier
- Consult your PETRONAS Contract Management representative via the Contract Discussion Forum for any clarification required

2

Click here to access the SMART by GEP system.

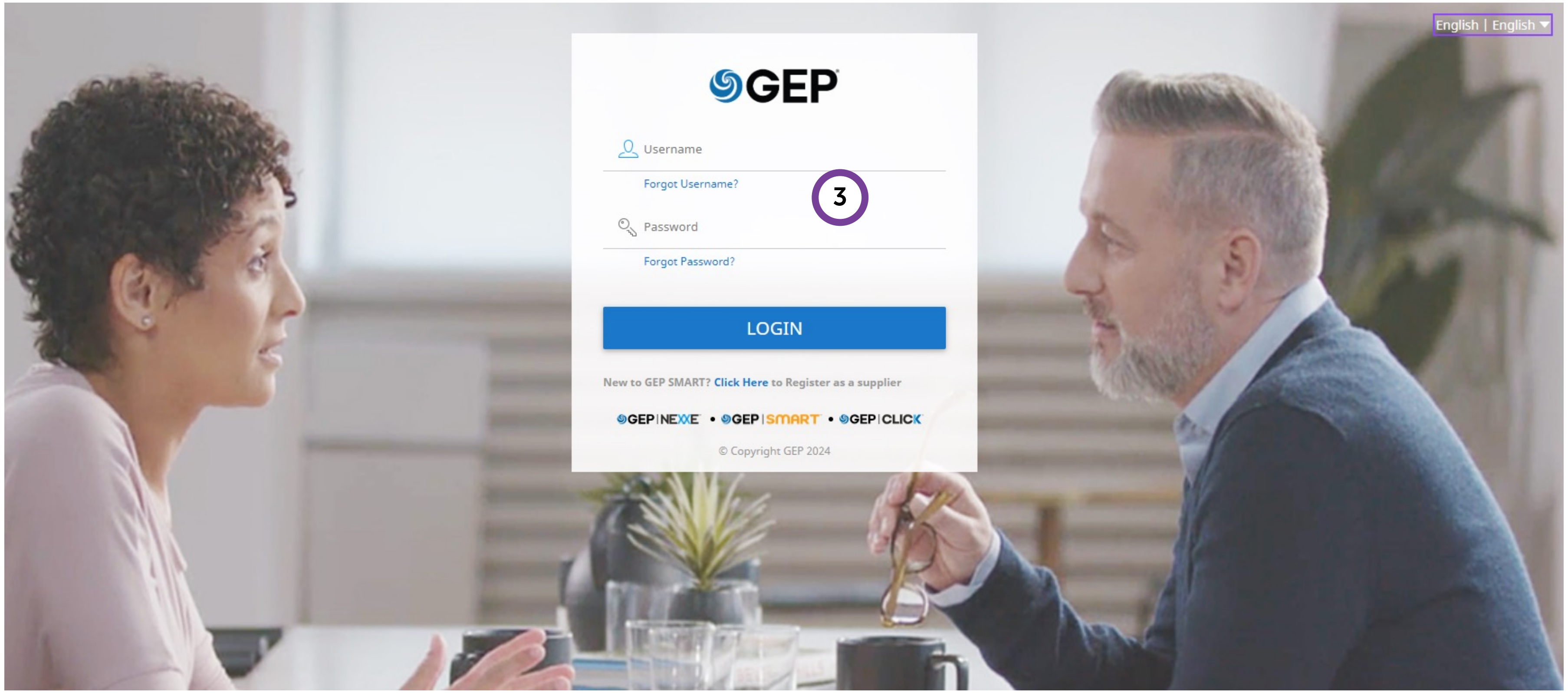
Note: This is a system generated email.

1	You will receive an email notification as per screenshot on the left. This means that you will need to respond to the relevant contract obligation. Proceed to log into your SMART account.
2	Click **"Click here"** URL from the email to access the SMART by GEP system.

Respond to Contract Obligations

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Supplier can navigate to the outstanding contract obligations from the Home Page.

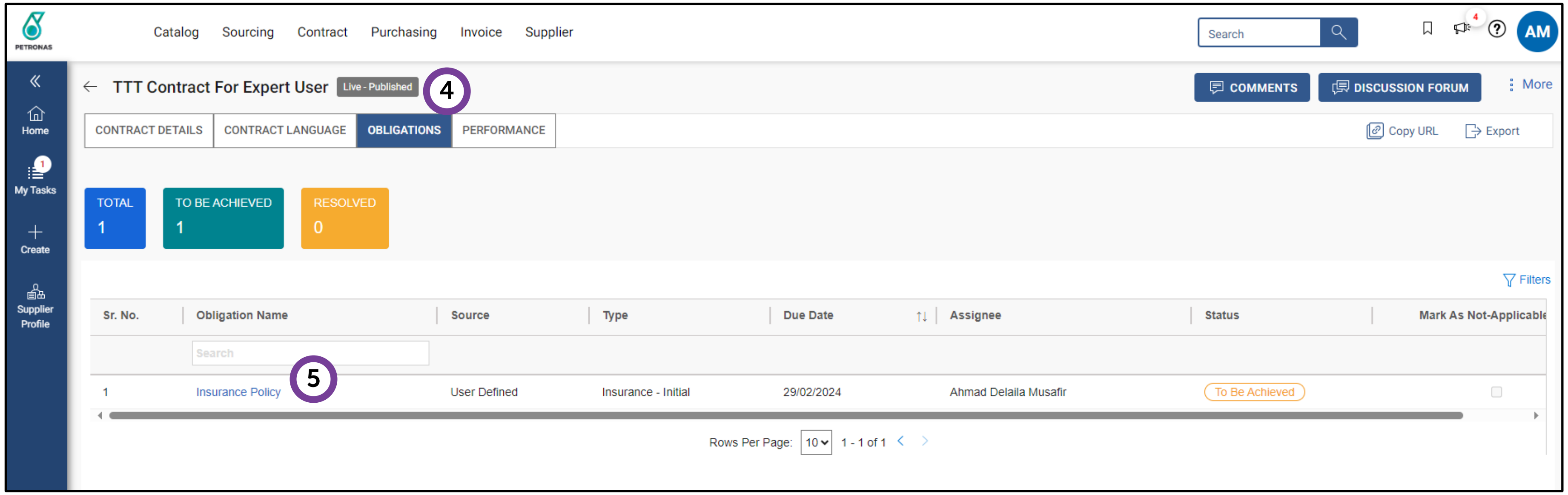


3	Enter your SMART username and Password to access the Contract Obligations

Respond to Contract Obligations

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Supplier will need to update the status of the action plan that they have been assigned to upon completion of the obligation.

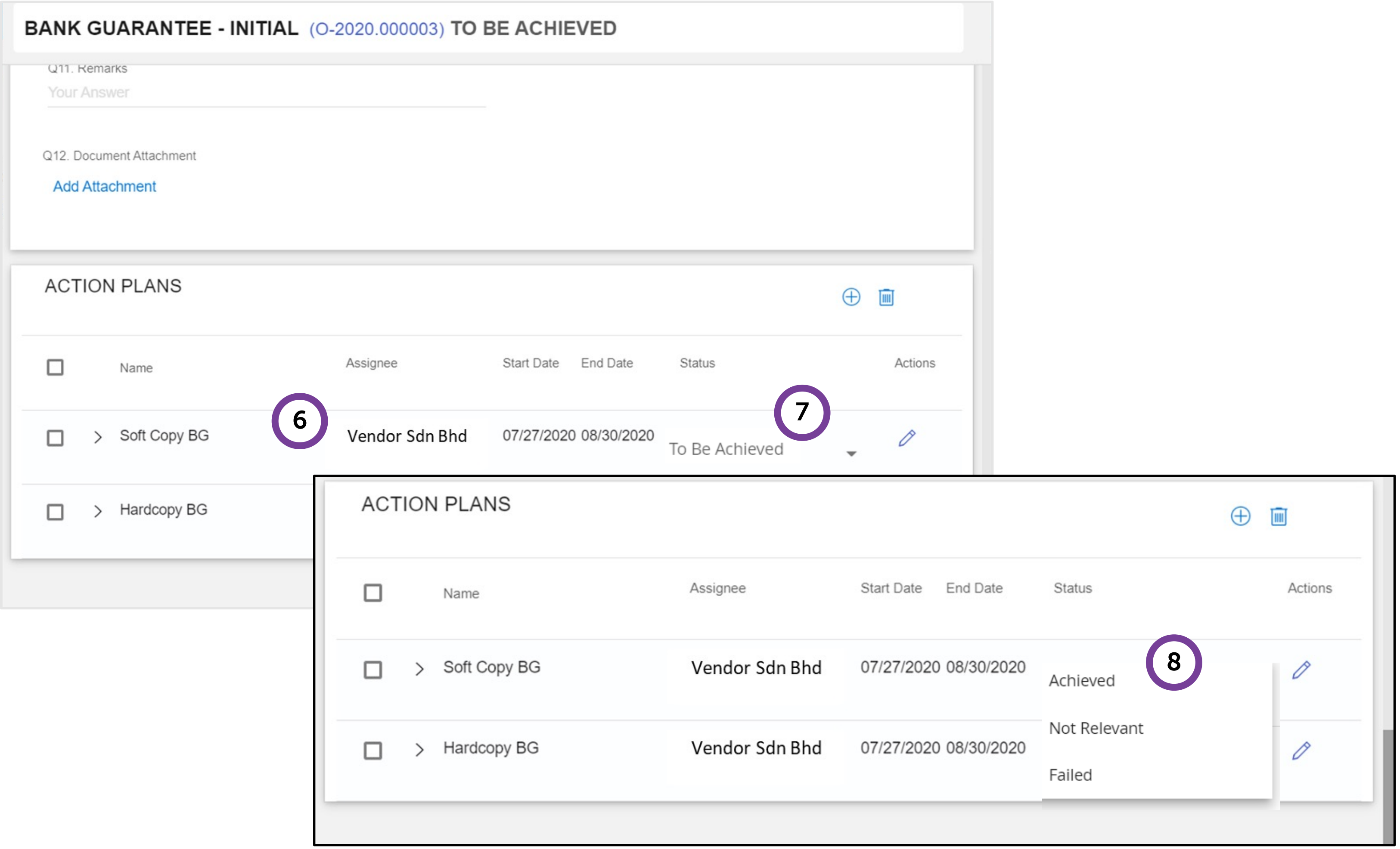


4	From contract document, click on **Obligation** tab.
5	Click on the **Obligation Name** where the action plan needs to be updated.

Respond to Contract Obligations

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Supplier will need to update the status of the action plan that they have been assigned to upon completion of the obligation.



6	Look for the '**Action Plans**' that you are assigned to.
7	Click on the '**To Be Achieved**' Status to update the status of the Action Plan.
8	Choose the relevant option to update the status: • **Achieved** – Action Plan Achieved / Acknowledged Reminder. • **Not Relevant** – Action Plan Not Relevant / Reminder not applicable. • **Failed** – Action Plan failed to be completed.

Contract Obligation Types & Definition

It is the supplier's responsibility to understand and fulfil their contractual obligations as and when required throughout the contract period. Specific Action Plans configured to Obligations are assigned to either PETRONAS and Supplier. The types of obligations that involves suppliers are as follows:

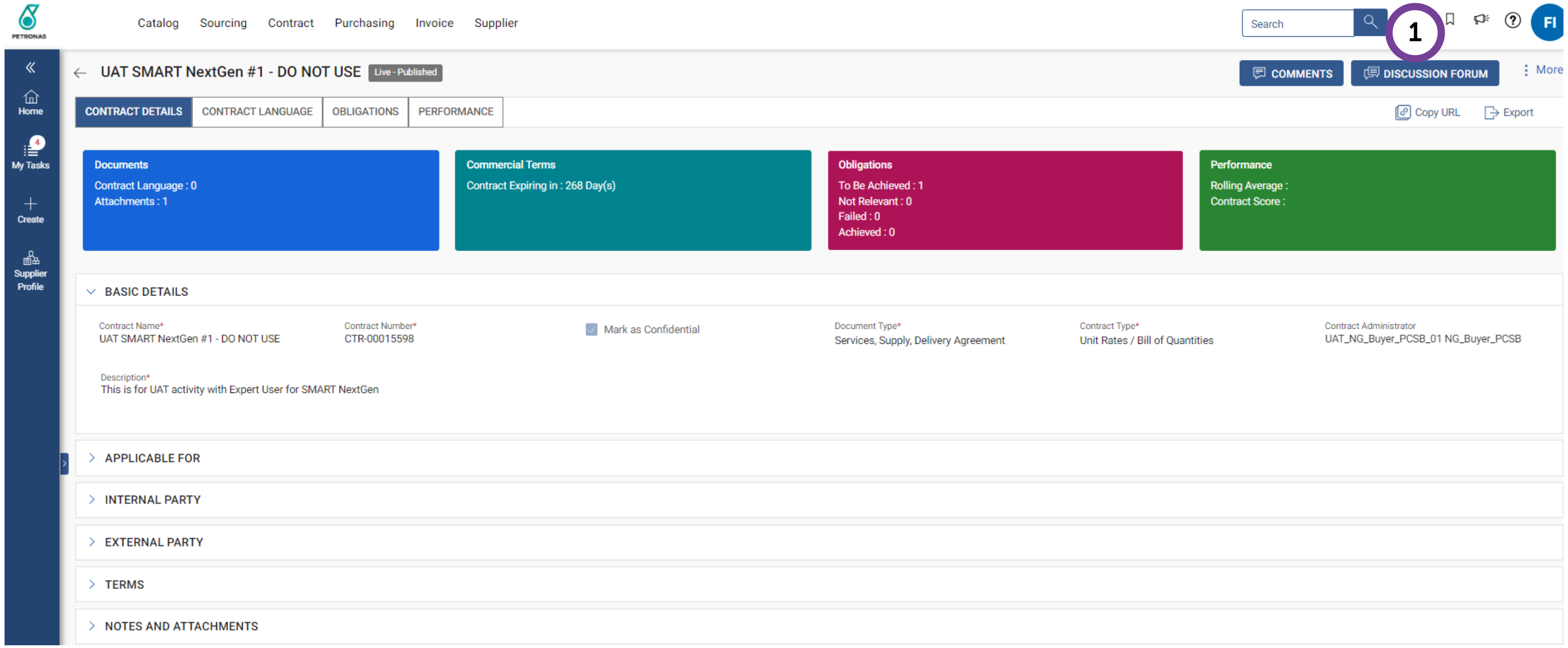
Obligation Type	Description	Specific Action Plan for Business User
Liquidated Damages	Liquidated Damages Reminders & Notices	Supplier to acknowledge delivery reminder 1
		Supplier to acknowledge delivery reminder 2
		Supplier to acknowledge delivery reminder 3
		Supplier to acknowledge notice of default
Bank Guarantee - Initial	Bank Guarantee Information	Supplier to submit soft copy of BG through SMART
		Supplier to submit original copy by hand
Bank Guarantee - Subsequent	Bank Guarantee Information & Renewal Reminders	Supplier to acknowledge renewal reminder 1
		Supplier to acknowledge renewal reminder 2
		Supplier to acknowledge renewal reminder 3
		Supplier to submit soft copy of BG through SMART
		Supplier to submit original copy by hand
Bank Guarantee - Reminder	Configuration for Bank Guarantee Performance Reminders	Supplier to acknowledge performance reminder 1
		Supplier to acknowledge performance reminder 2
		Supplier to acknowledge performance reminder 3

Obligation Type	Description	Specific Action Plan for Business User
Parental Guarantee - Reminder	Configuration for Parental Guarantee Performance Reminders	Supplier to acknowledge performance reminder 1
		Supplier to acknowledge performance reminder 2
		Supplier to acknowledge performance reminder 3
Insurance - Initial	Insurance Policy Information	Supplier to submit soft copy of Insurance through SMART
Insurance - Subsequent	Insurance Policy Information & Renewal Reminder	Supplier to acknowledge renewal reminder 1
		Supplier to acknowledge renewal reminder 2
		Supplier to acknowledge renewal reminder 3
		Supplier to submit soft copy of Insurance through SMART
Contract Closure	Contract Closure Checklist	Supplier to confirm settlement of all financial obligations (payments)
		Supplier to confirm no outstanding issues
		Supplier to issue Contract Closure Certificate via SMART (if applicable)

Using The Discussion Forum

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

For any clarification regarding the contract, supplier shall use the discussion forum as the formal communication channel with PETRONAS.



1 Click on the '**Discussion Forum**' icon to initiate communication with PETRONAS.

Topic > Discussion > Threads

Topic:
- Topic is the group name where you can have multiple discussions around a topic.
- A Topic can have multiple Discussions.

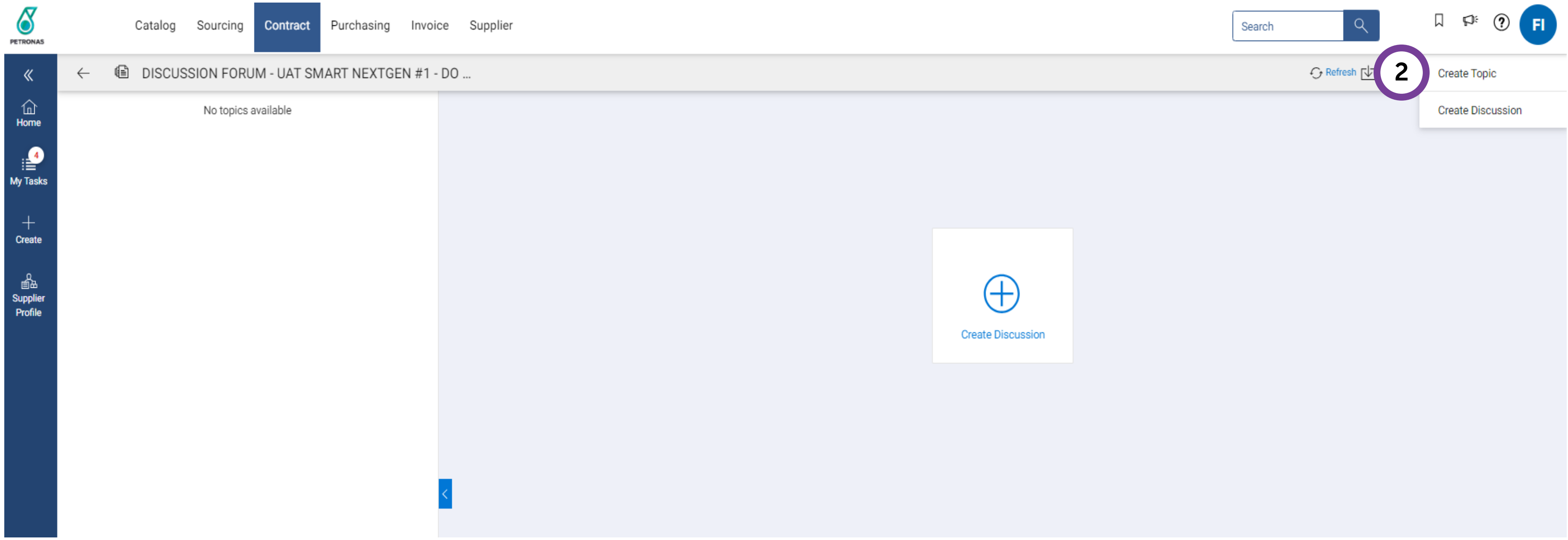
Discussion:
- A Discussion is a sub-unit under Topic.
- One (1) Discussion can have multiple Threads.

Only the **Supplier Contact** designated in the contract can initiate a thread in the Discussion Forum. Other team members within your company will only be able to view the contract details.

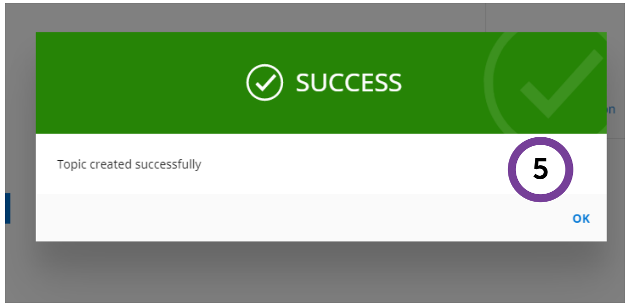
Using The Discussion Forum

1 Access Contract Repository
2 Upload Notes, Attach-ments & Links
3 Respond to Contract Obligations
4 Using The Discussion Forum
5 Update Supplier Contact Information

Supplier will first be required to create a suitable topic.



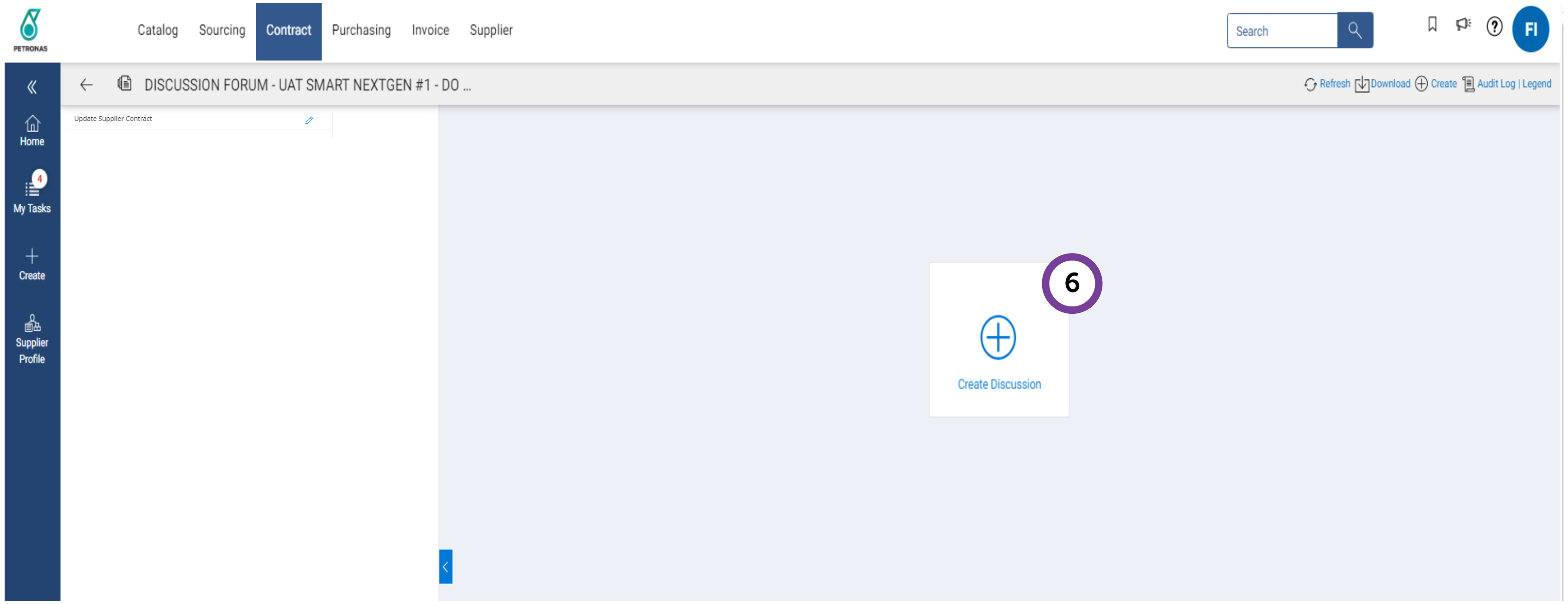
2	Click on Create in the top right to begin. Next click on '**Create Topic**'.
3	Enter the relevant '**Topic Name**'.
4	Click '**Save**' to save the topic.
5	Click '**OK**' to complete the topic creation.



Using The Discussion Forum

1. Access Contract Repository
2. Upload Notes, Attach-ments & Links
3. Respond to Contract Obligations
4. Using The Discussion Forum
5. Update Supplier Contact Information

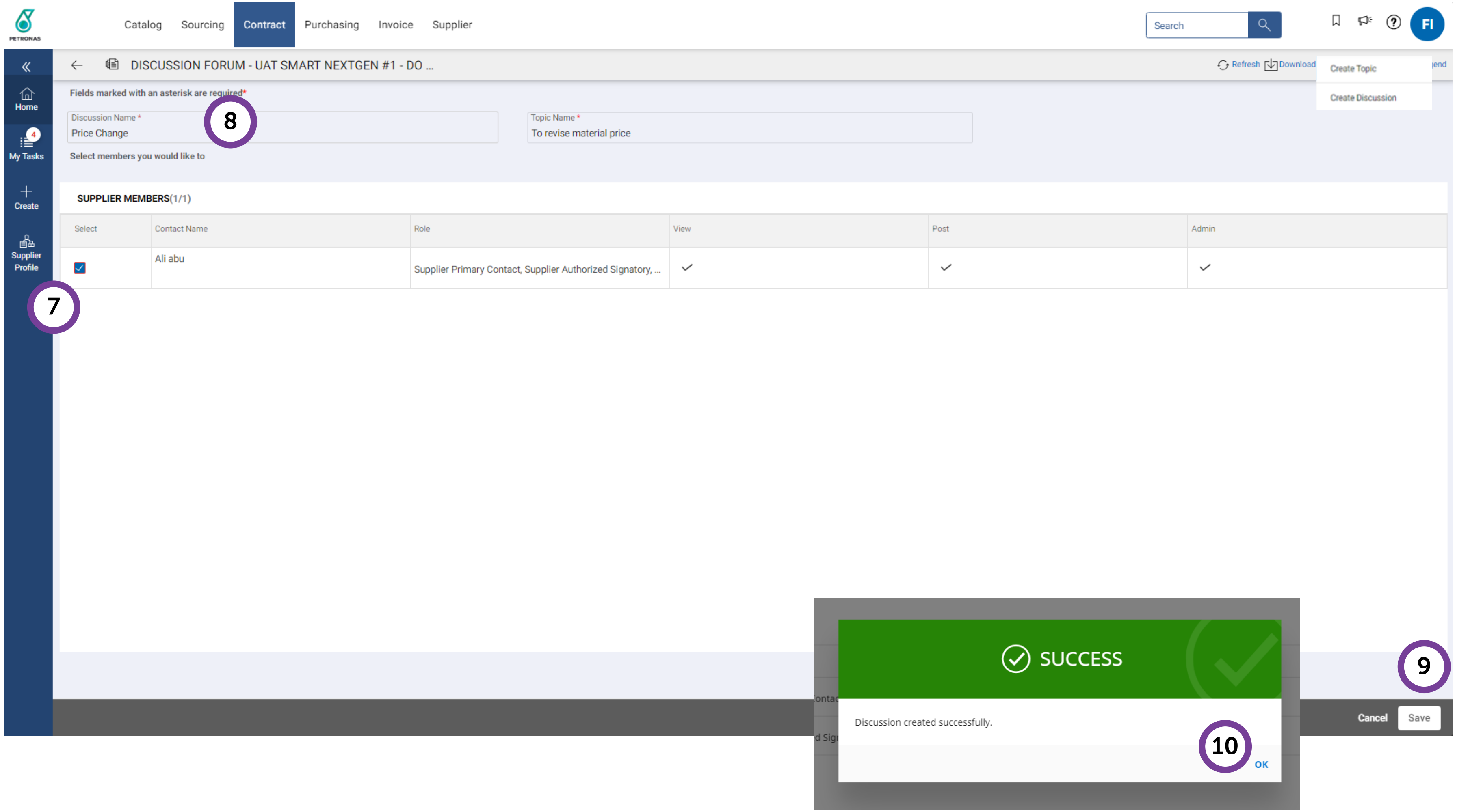
Once the topic has been established, supplier shall create a Discussion around the topic.



6 In the newly created topic, click on '**Create Discussion**'.

Using The Discussion Forum

Once the topic has been established, supplier shall create a Discussion around the topic.

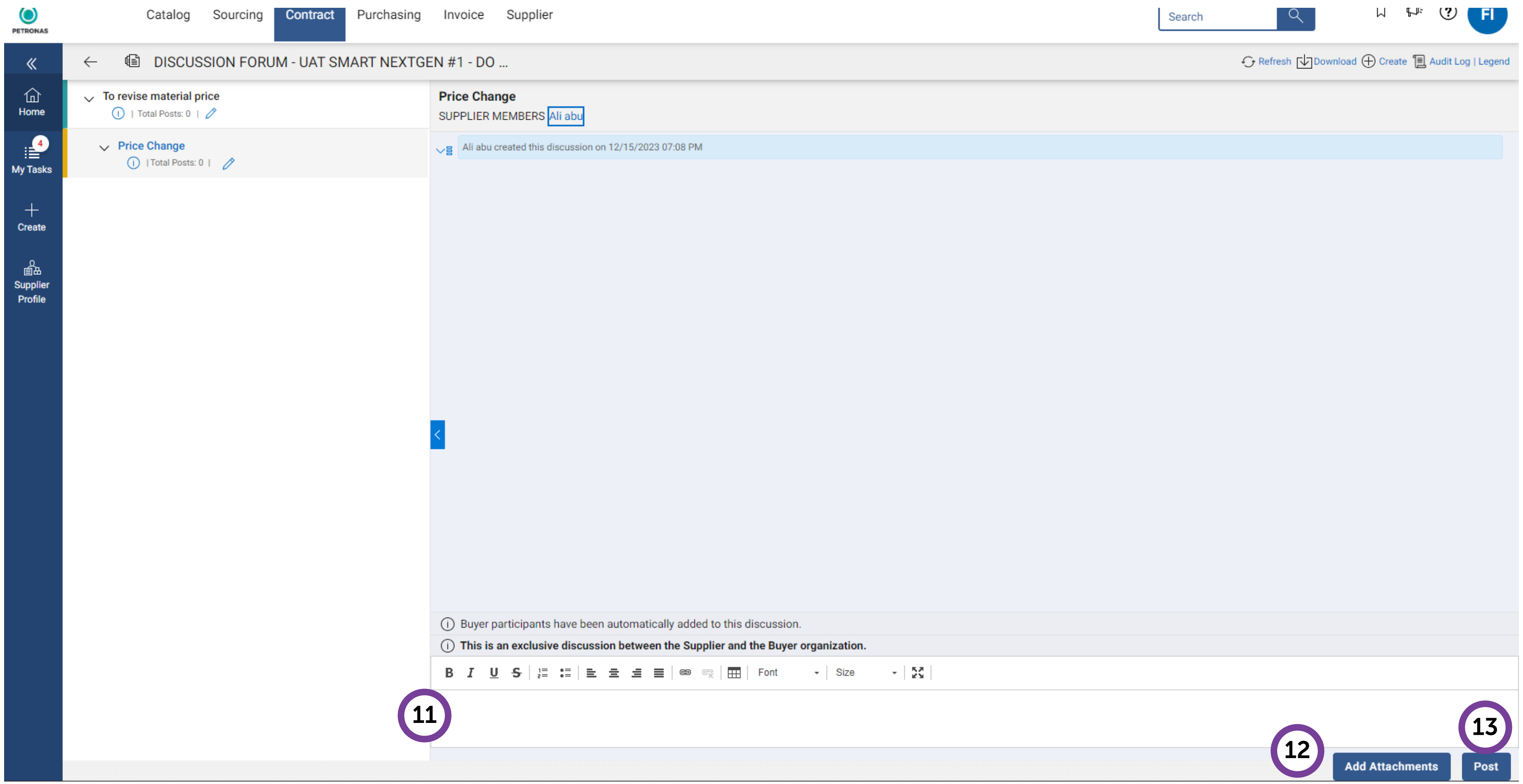


7	Select the '**Supplier Members**' to be included in the Discussion. Note: Click on ⊕ to select an existing Topic or to add new Topic.
8	Provide a name for the Discussion.
9	Click '**Save**' to save the Discussion name.
10	Click '**OK**' to complete the Discussion creation.

Using The Discussion Forum

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Lastly, supplier can initiate their query by posting a discussion thread.

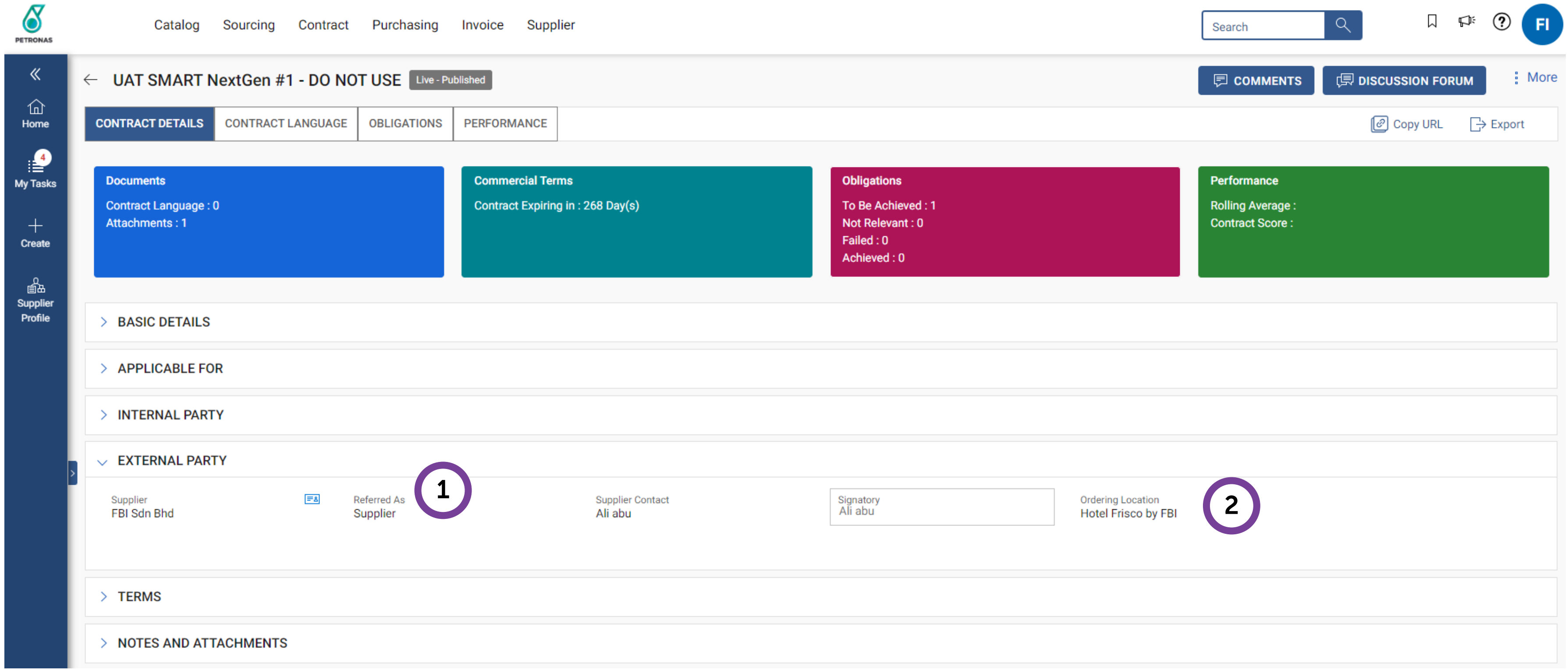


11	Post the thread at the allocated post section.
12	If you wish to upload any attachments in the thread, click the '**Attach Document**' icon to post your attachment.
13	Click '**Post**' to submit the discussion thread.

Update Supplier Contact Information

1 Access Contract Repository — 2 Upload Notes, Attach-ments & Links — 3 Respond to Contract Obligations — 4 Using The Discussion Forum — 5 Update Supplier Contact Information

Information to be updated if required through contacting contract administrator via the Discussion Forum.



1	Under the **External Party** section, you can update the Supplier Contact by submitting a request via the Discussion Forum to the authorised PETRONAS personnel. Note: The Supplier Contact refers to primary team member who manages this contract.
2	Under the **External Party** section, you can also update the Ordering Location. Note: • Ordering Location to be maintained based on the branch where Supplier will receive Purchase Orders (PO). • The Ordering Location will be defaulted in the PO. For any changes in the Contract, please submit your request via the Discussion Forum to the authorised PETRONAS personnel.

Only authorised PETRONAS personnel can update the '**Supplier Contact**' and '**Ordering Location**'. For any changes, please submit your request via Discussion Forum.

Application Deep Dive

Purchase Order Acknowledgement

Purchase Orders are sent to suppliers in GEP SMART. Suppliers will be able to view and acknowledge the purchase orders.

Learning Objectives

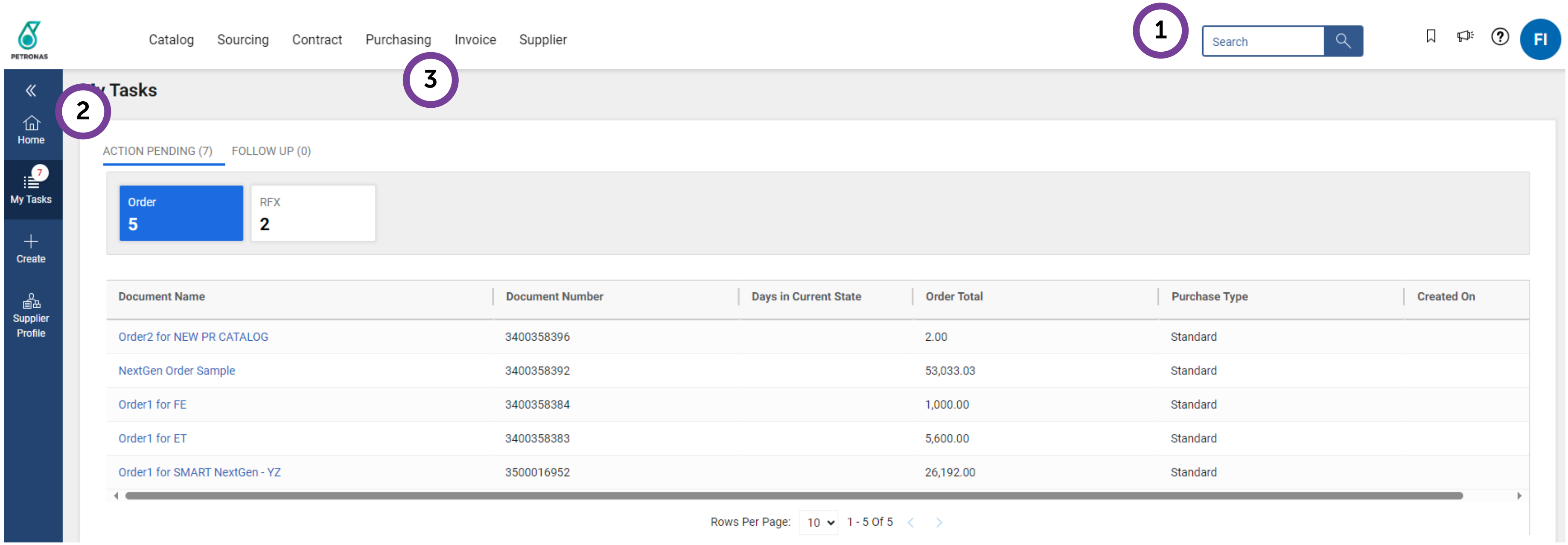
Suppliers will be able to view Purchase Order Details and create Purchase Order Acknowledgement.

1. View Purchase Order
2. Create Purchase Order Acknowledgement

View Purchase Order (1/6)

1 View Purchase Order — 2 Create PO Acknow-ledgement

Purchase Order can be searched directly from the Home Page.

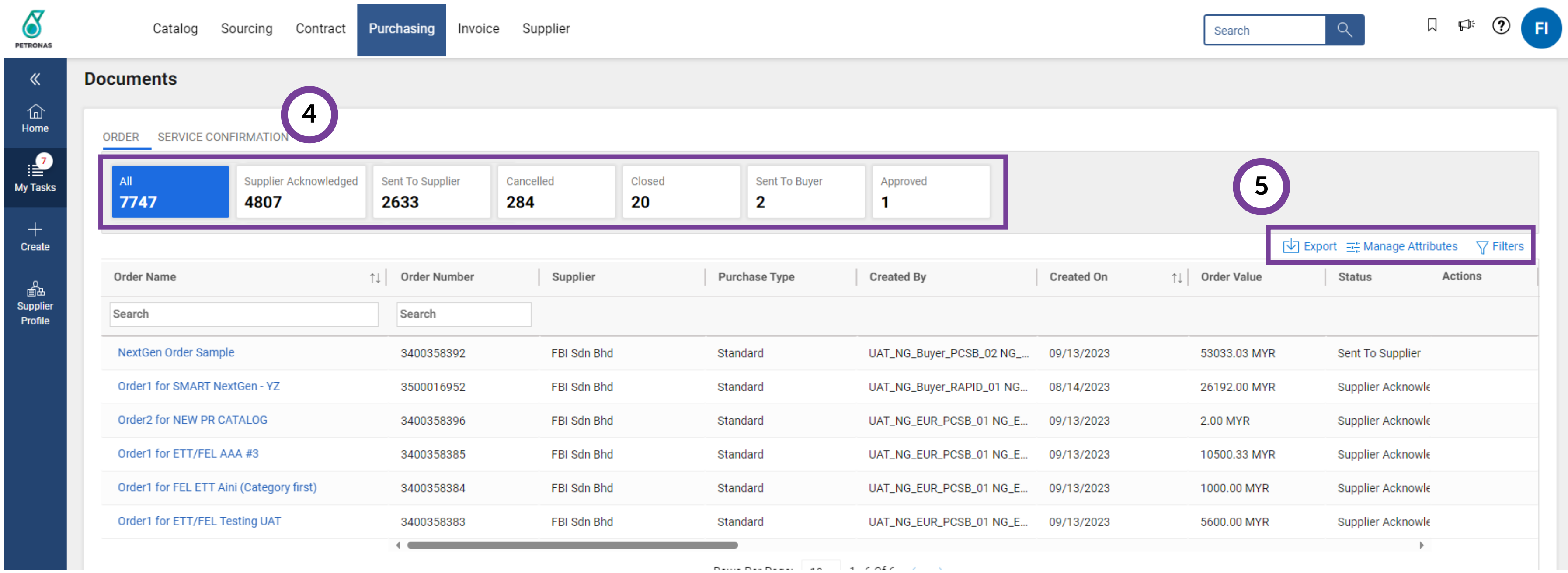


1	Supplier can search Purchase Order (PO) directly via inserting the PO number in the 'Search' field at the Home Page.
2	Supplier may find new PO issued to them for acknowledgment from **'My Tasks'.** Note: A notification will be issued to the Supplier upon successful creation of new Purchase Order from PETRONAS. However, the final list of Purchase Orders is always referring to the one available in the system.
3	Alternatively, Supplier are able to to view all PO details via **'Purchasing'** tab including new ones.

View Purchase Order (2/6)

1 View Purchase Order — 2 Create PO Acknow-ledgement

Purchase Order can be searched directly from the Home Page.

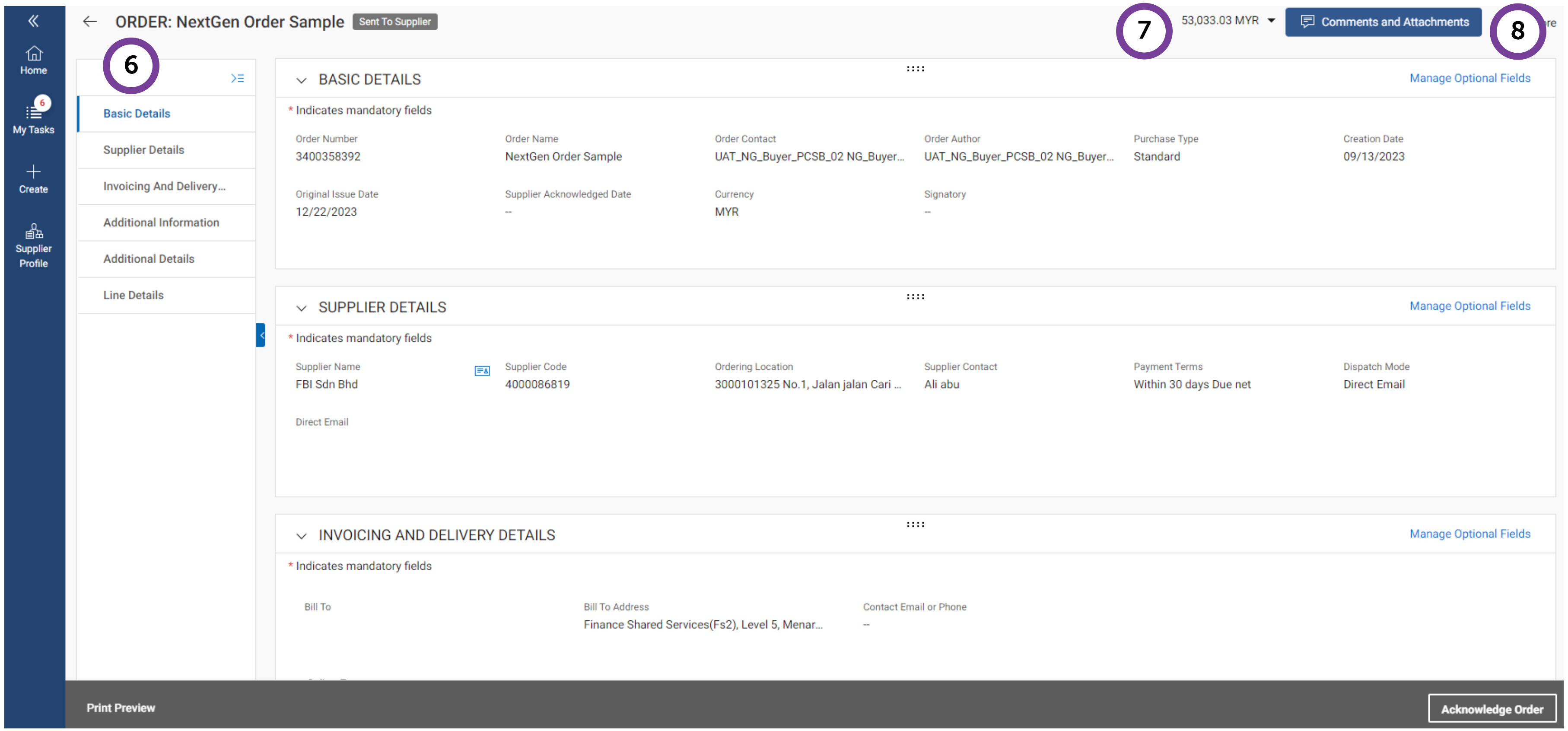


4	All PO documents are segregated according to its statuses for ease of reference and searching.
5	Click on **'Export'** to download the PO listing. Export Click on **'Manage Attributes'** to include/exclude available field column. Manage Attributes Click on **'Filters'** to search specific document (i.e., PO) by desired attributes. Filters

View Purchase Order (3/6)

1 View Purchase Order
2 Create PO Acknow-ledgement

Details of the Purchase Order will be available in the Interface.



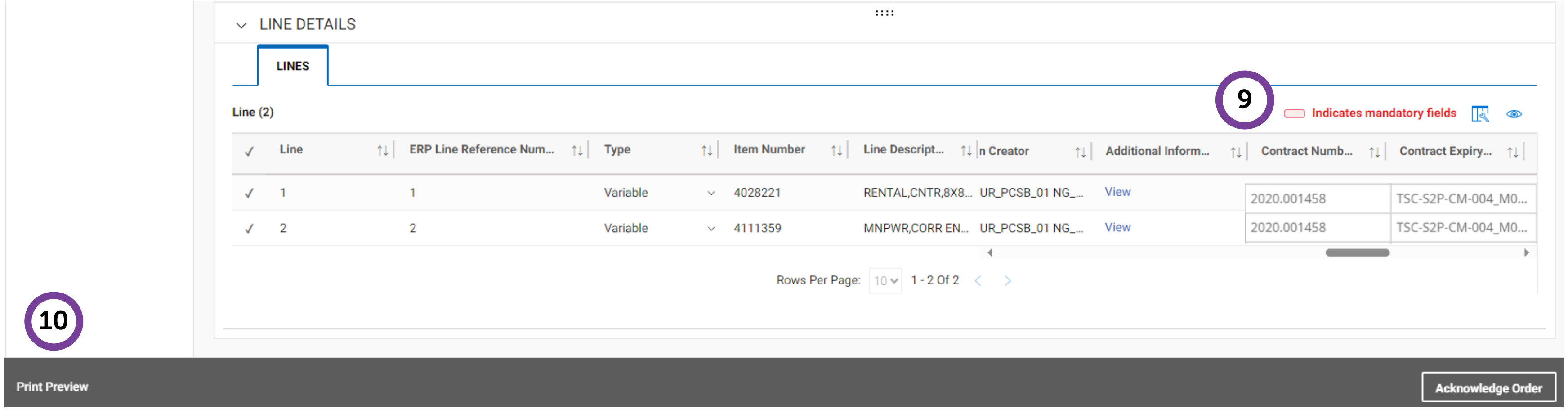
6	Purchase Order details will be displayed in six Header Values which are Basic Details, Supplier Details, Invoicing And Delivery Details, Additional Information, Additional Details and Line Details. Supplier to also check at the **'Additional Information'** field for further info/details on the items (if any). Supplier can also click 'Print Preview' in order to have a total view of the Purchase Order. Print Preview
7	Supplier will be able to view the **Purchase Order Net Value** at the top right of the screen.
8	Supplier is not able to edit details in the PO. Supplier can utilise the **"Comments & Attachments"** feature to key in additional info or Supplier PO reference number,

Supplier to check on the details of the Purchase Order prior to acknowledging it. Any discrepancies of details shall be highlighted to PETRONAS accordingly.

View Purchase Order (4/6)

1 View Purchase Order — 2 Create PO Acknow-ledgement

Details of the Purchase Order will be available in the Interface.

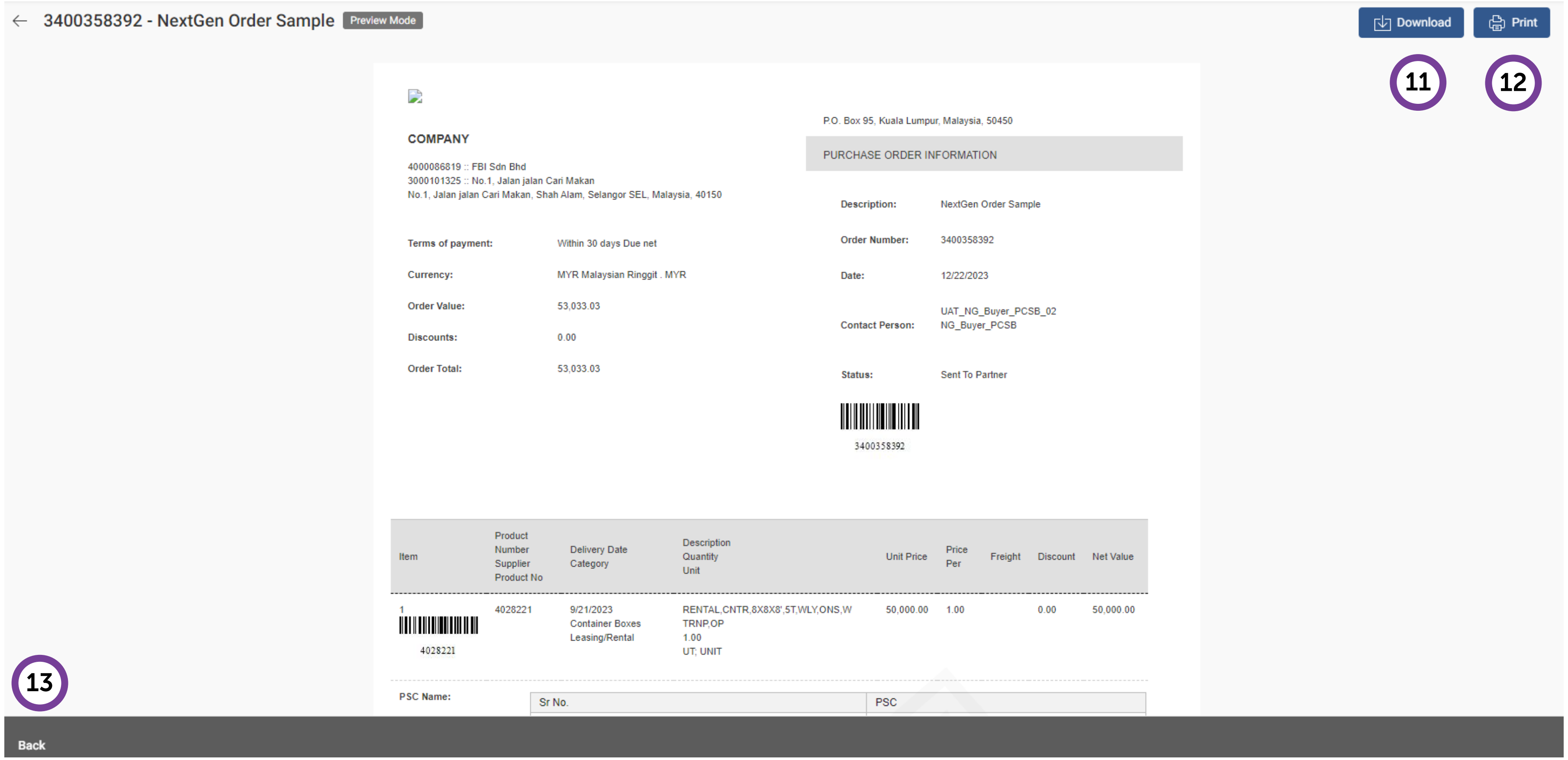


9	Supplier is also able to view the **Contract Number, Contract Name & Contract Expiry** in the Line Details section (For contractual purchase).
10	Supplier can also click "**Print Preview"** at the bottom left of the page to get an overall view of the Purchase Order. Print Preview

Supplier to check on the details of the Purchase Order prior to acknowledging it. Any discrepancies of details shall be highlighted to PETRONAS accordingly.

View Purchase Order (5/6)

Details of the Purchase Order will be available in the Interface.



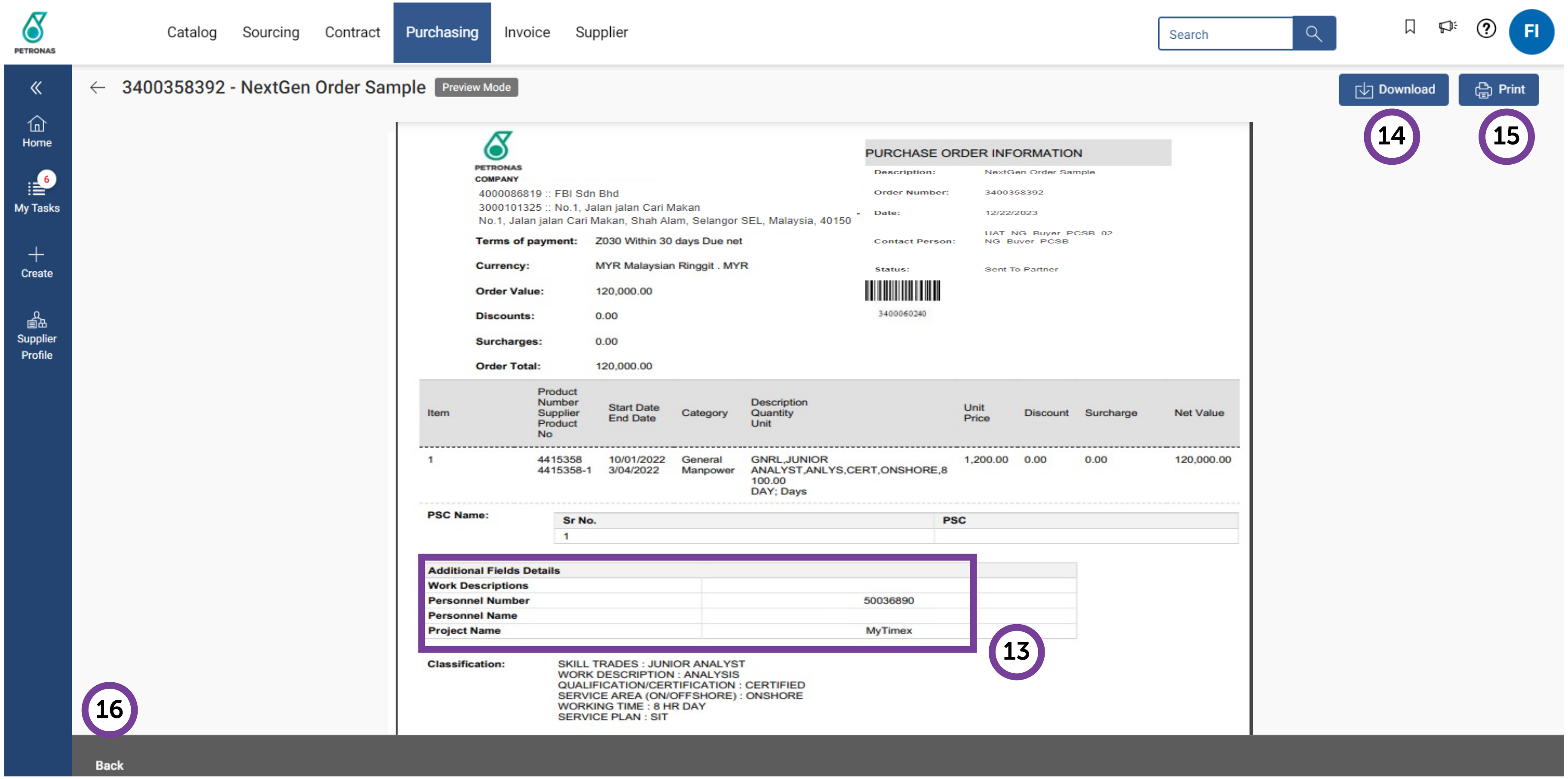
11	Click "Download" to download a copy of the PO. Download
12	Click "Print" to print a copy of the PO. Print
13	Click "Back" to go to the previous screen. Back

Supplier to check on the details of the Purchase Order prior to acknowledging it. Any discrepancies of details shall be highlighted to PETRONAS accordingly.

View Purchase Order (6/6) - Timewrite

1 View Purchase Order — 2 Create PO Acknow-ledgement

Assigned project details will be available in the Purchase Order Interface.



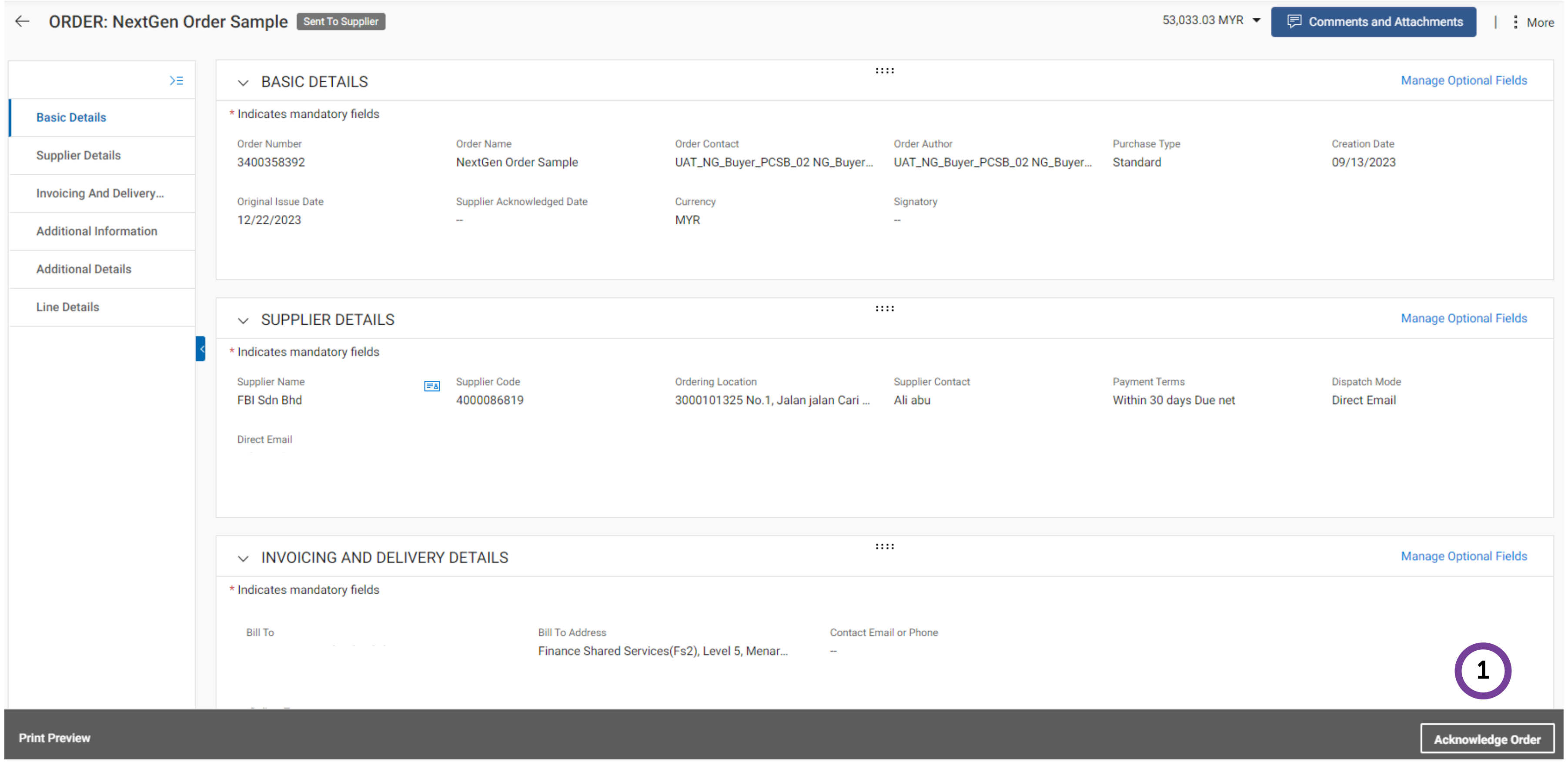
13	**"Additional fields details"** displays information about the contractors and the assigned project.
14	Click **"Download"** to download a copy of the PO. Download
15	Click **"Print"** to print a copy of the PO. Print
16	Click **"Back"** to go to the previous screen. Back

Supplier to check on the details of the Purchase Order prior to acknowledging it. Any discrepancies of details shall be highlighted to PETRONAS accordingly.

Create Purchase Order Acknowledgement

1 View Purchase Order → 2 Create PO Acknow-ledgement

Supplier is required to create a Purchase Order Acknowledgement to confirm the Purchase Order details prior to delivery of item or initiation of services.



1	Once supplier complete validating the Purchase Order Details, supplier to proceed with Supplier Acknowledgement in SMART by triggering the '**Acknowledge Order**' at bottom right of the Purchase Order Screen. **Important:** Supplier to check details of the Purchase Order prior to acknowledging it. Any discrepancies should be highlighted to PETRONAS accordingly.

Notice that the status of the new Purchase Order is 'Sent to Supplier'. Upon clicking 'Acknowledge Order', status of the PO will be 'Acknowledged'

Application Deep Dive

1. Account Activation
2. Supplier Profile Approval & Update
3. RFX Response
4. Tender Clarification
5. Commercial Resubmission
6. Letter of Award Acceptance
7. Contract Management
8. Purchase Order Acknowledgement
9. **Goods Acceptance / Service Confirmation**
10. Invoice Management & Payment

For Suppliers providing manpower services to PDSB (for PDSB **Timewrite** purposes), kindly **skip the creation of Service Confirmation** steps and proceed to Invoice Management & Payment.

Goods Acceptance / Service Confirmation

Acceptance process for goods will be done by PETRONAS upon receipt of material and service confirmation will be created by supplier in GEP SMART after service completion.

Learning Objectives

Suppliers will be able to view Goods Receipt Quantity in Purchase Order and create Service Confirmation in GEP SMART

1 — **View Goods Acceptance & Return Note**

2 — **Create Service Confirmation (Rate Based)**

View Goods Acceptance & Return Note

Supplier will be able to view Good Acceptance status and Return Note for materials in GEP SMART.

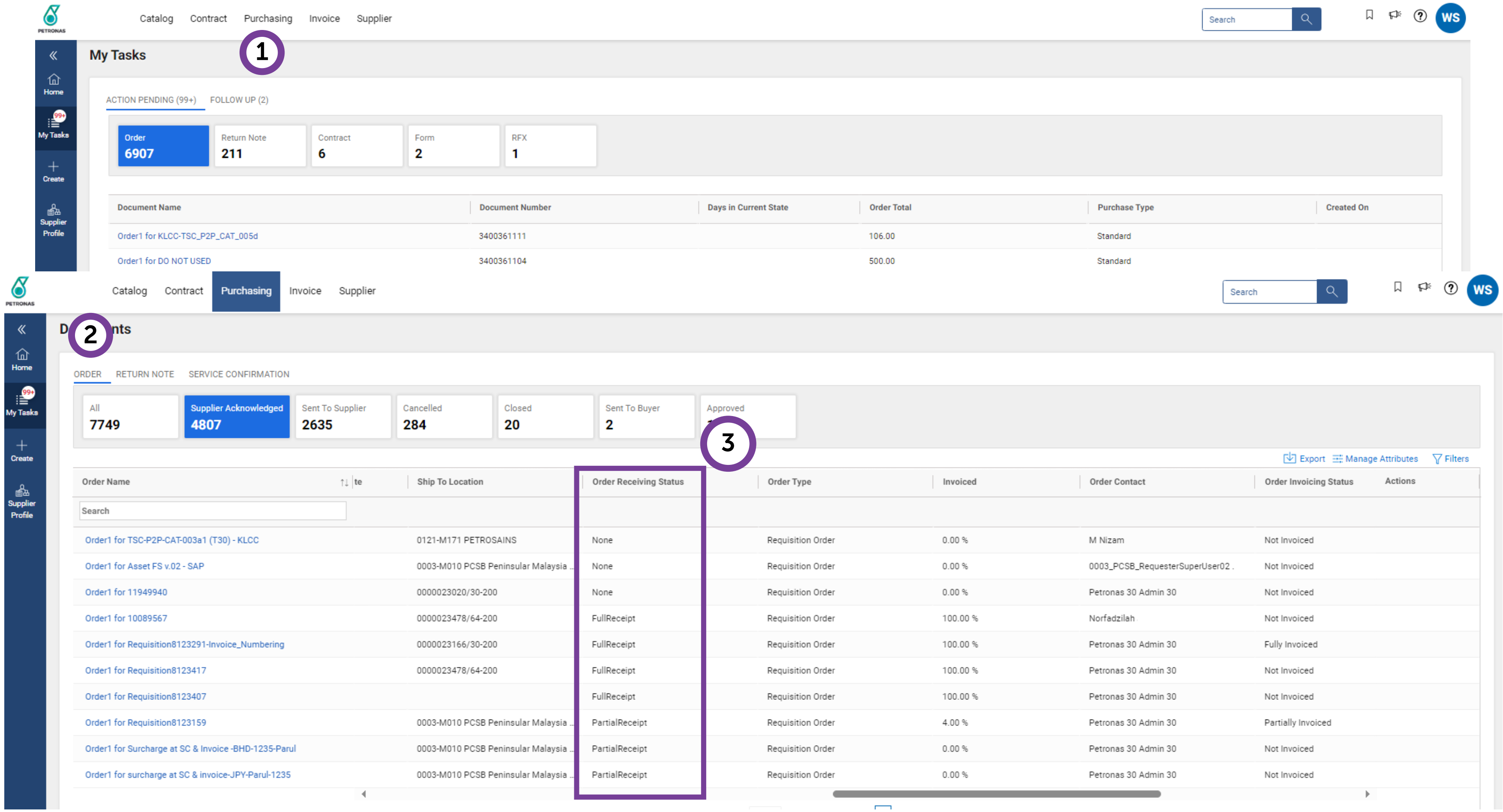
1. **Goods Acceptance –** Acceptance quantity, net of cancellations or return deliveries, will be displayed in the respective Purchase Order at item level.

2. **Return Note –** Return note will be created for item that fails Acceptance process. Supplier can view the individual return note document.

View Goods Acceptance

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

The Goods Acceptance status will be available in Purchase Order details in GEP SMART after PETRONAS creates the Good Received internally.



1	To view the Goods Acceptance Status for Purchase Orders, click on **'Purchasing'** at the Home Page.
2	Under **'Order'** section, select on **'Supplier Acknowledged'** tab.
3	In **'Order Receiving Status'** column where it states the overall PO Good Acceptance status. If the column is not available, supplier can add the field attribute from '**Manage Attributes**'. Manage Attributes

None – No Good Acceptance done

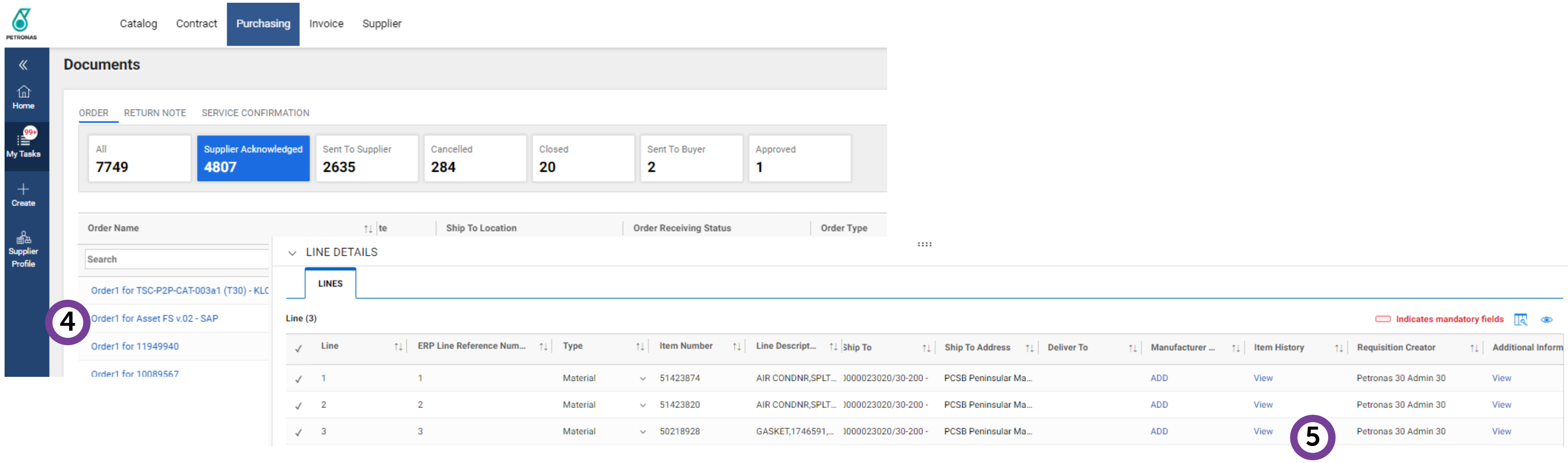
Partial Receipt – Good Acceptance done partially

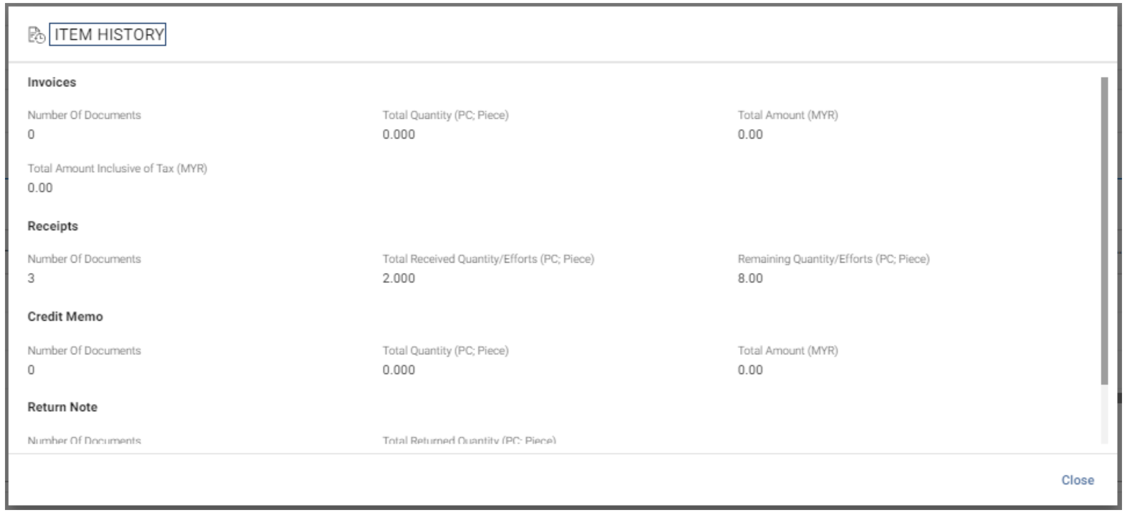
Full Receipt – Good Acceptance done for all line items

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

View Goods Acceptance

The Goods Acceptance status will be available in Purchase Order details in GEP SMART after PETRONAS creates the Good Received internally.





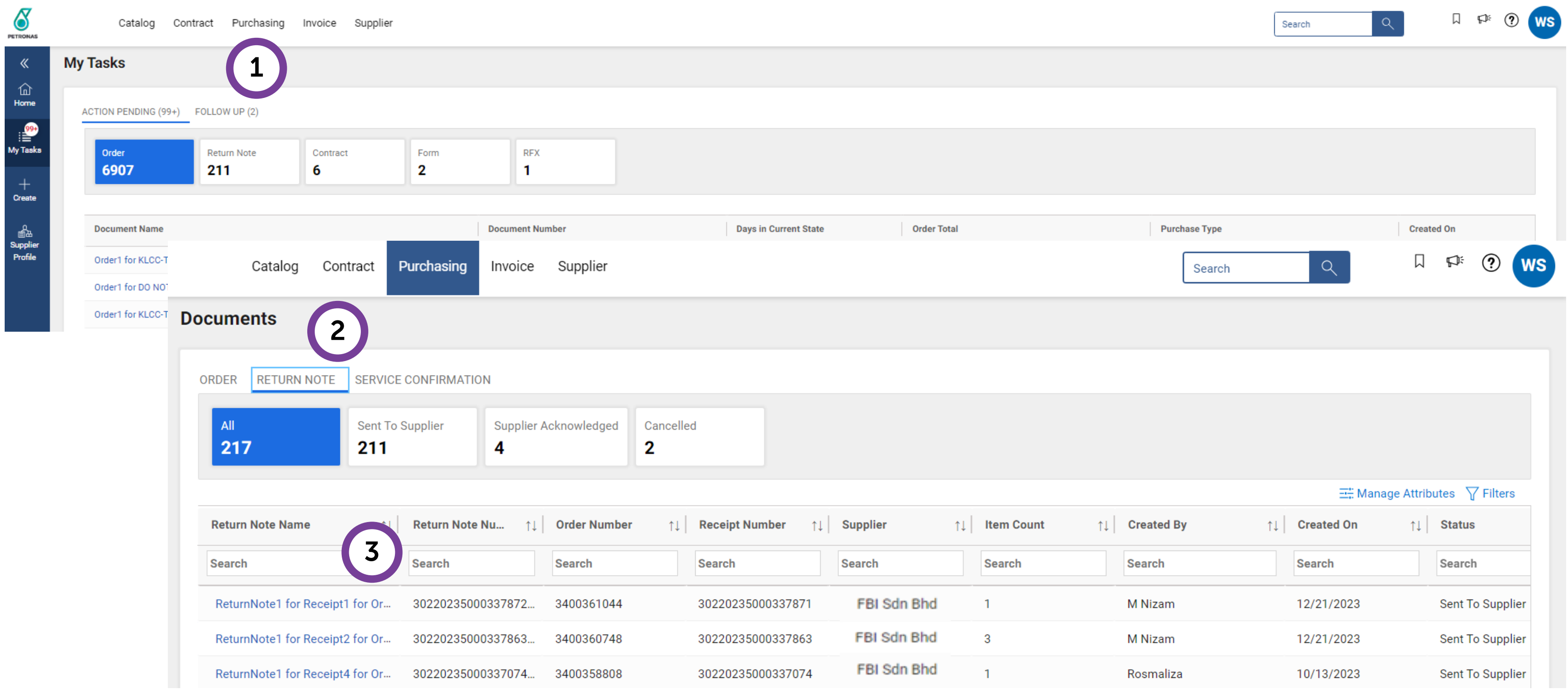
4	Select intended PO document by clicking on the PO name.
5	At **'Line Details'** section of the PO, scroll to the right and look for **'Item History'** column. Supplier will be able to view the Acceptance Quantity by clicking **'View'** in the item history. • If VIEW is clickable (blue), subsequent document (e.g. SC, receipt and etc.) has been created. • If VIEW is not clickable (grey), no subsequent document is created. Total Received Quantity is the total accepted quantity.

Supplier to check on the Total Received Quantity prior to creation of invoice.

1 Goods Acceptance & Return Note
2 Service Confirm- ation (Rate Based)

View Return Note

Return Notes will be created for items that fail upon acceptance process. Supplier can view the individual Return Note document listed.

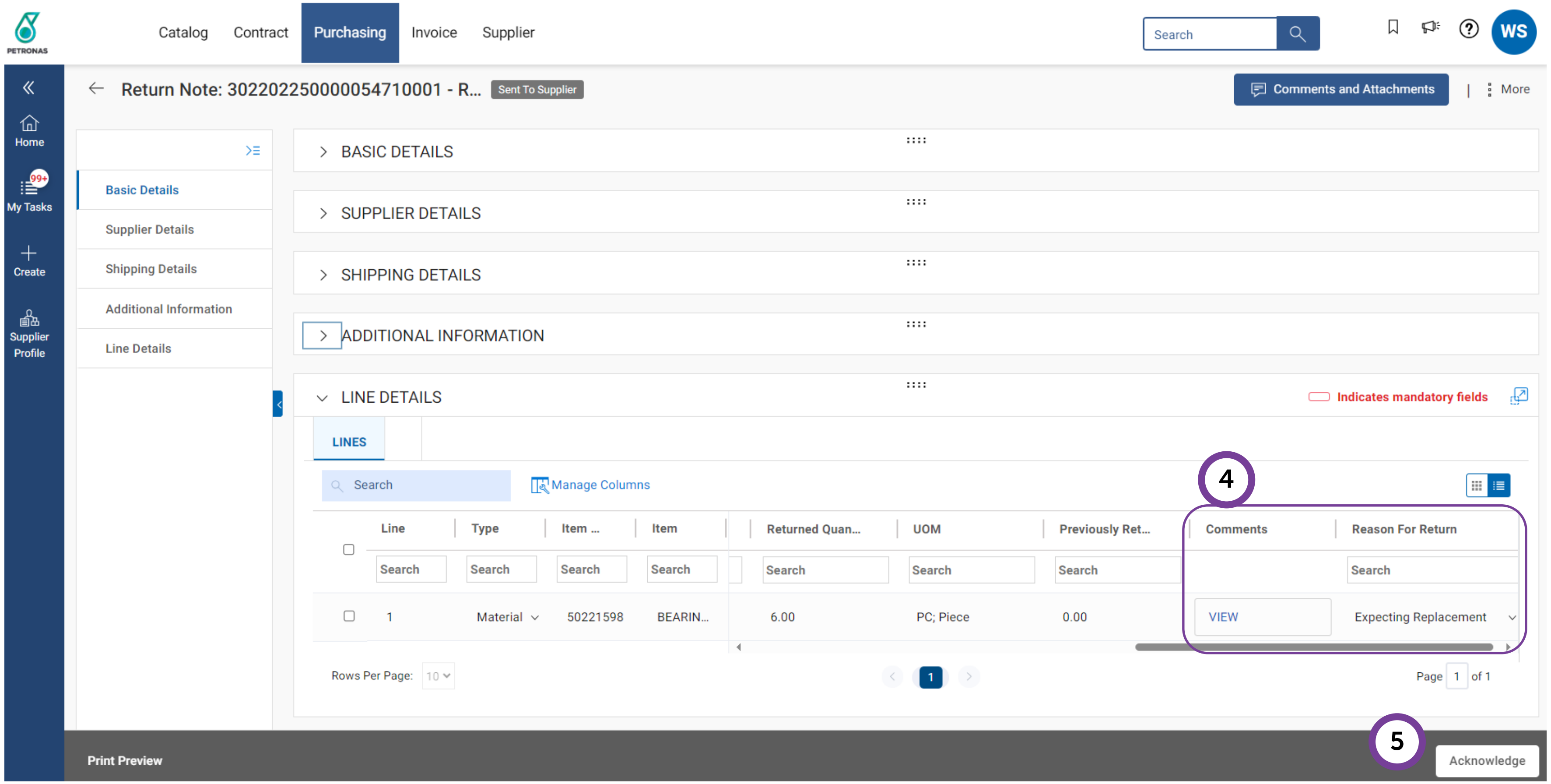


1	To view the list of Return Notes, click on '**Purchasing**' at Home Page.
2	Under **'Return Note'** section, select the desired Return Note document. '**Sent to Supplier**' are newly created Return Note for Supplier's acknowledgement. **'Supplier Acknowledged'** are Return Note that has been acknowledged by Supplier. **'Cancelled'** are cancelled Return Note from buyer/user.
3	Click on specific Return Note document to see the reason for return.

View Return Note

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

A Return Note will be created for material that failed acceptance (e.g. material in damaged condition).

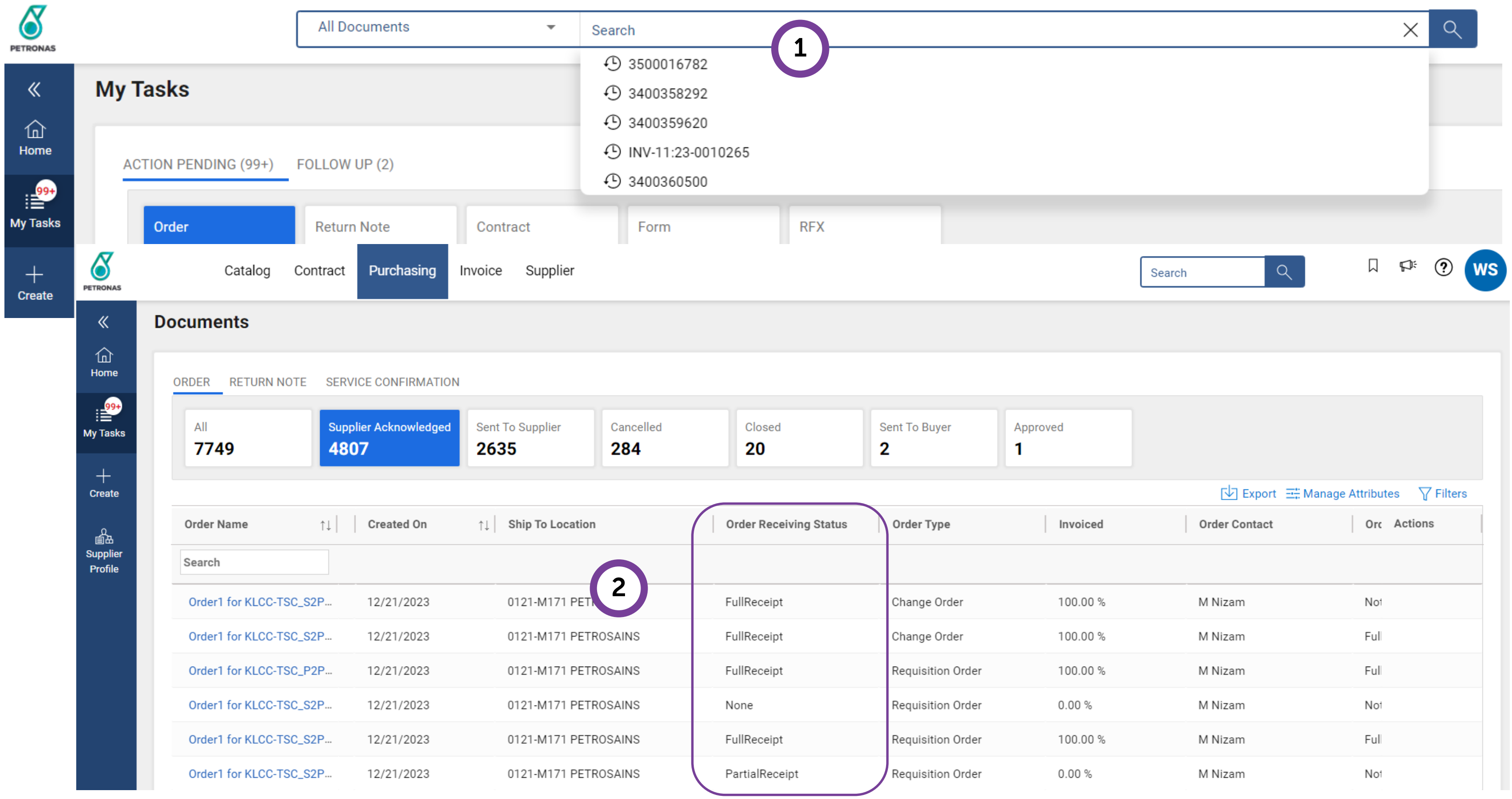


4	Under ‘**Line Details**’ section, Supplier will be able to view the ‘**Returned Quantity**’ of each return note document, and the ‘**Reason for Return**’. Click on View at **Comments** column to see more remarks from buyer/user (if any).
5	Upon agreement with buyer/end user on the return, Supplier shall acknowledge the Return Note by clicking on Acknowledge button at bottom right of the page. Acknowledge

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

Supplier to create service confirmation immediately upon completion of work as per agreed PO requirements.



1	Supplier to search for the PO number which they want to create Service Confirmation (SC) from the Search bar.
2	Alternatively, go to '**Purchasing**' from home page. Under '**Supplier Acknowledged**' tab, supplier may refer to '**Order Receiving Status**' column to determine which PO that is yet to create SC. **None** – No Good Acceptance done. **Partial Receipt** – Good Acceptance done partially. **Full Receipt** – Good Acceptance done for all line items. Note: Only PO that has Service acquisition requires SC creation.

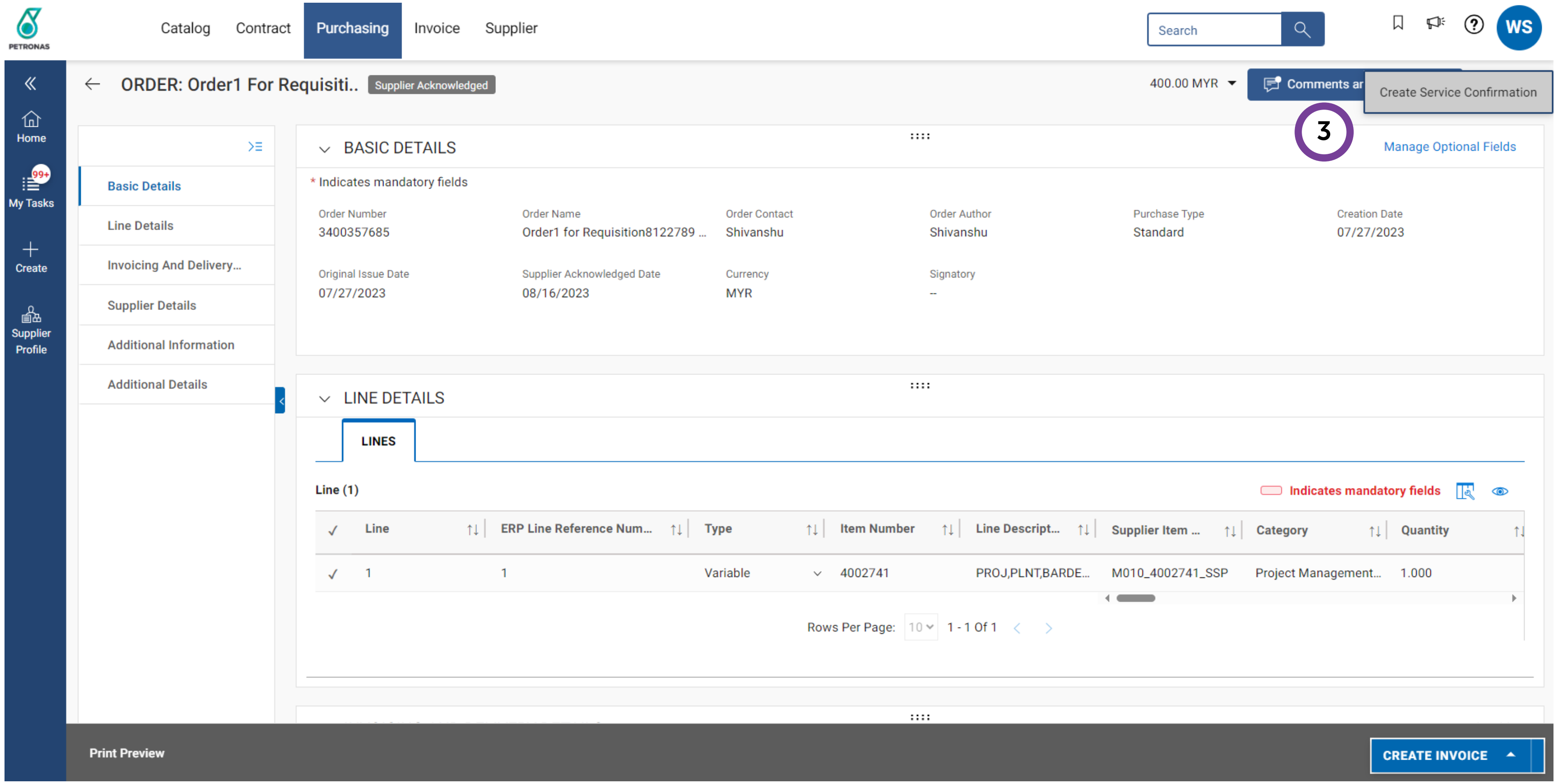
This step is **not applicable for Suppliers providing manpower services to PDSB** (for PDSB **Timewrite** purposes).

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note

2 Service Confirm-ation (Rate Based)

PO details will be display on screen.



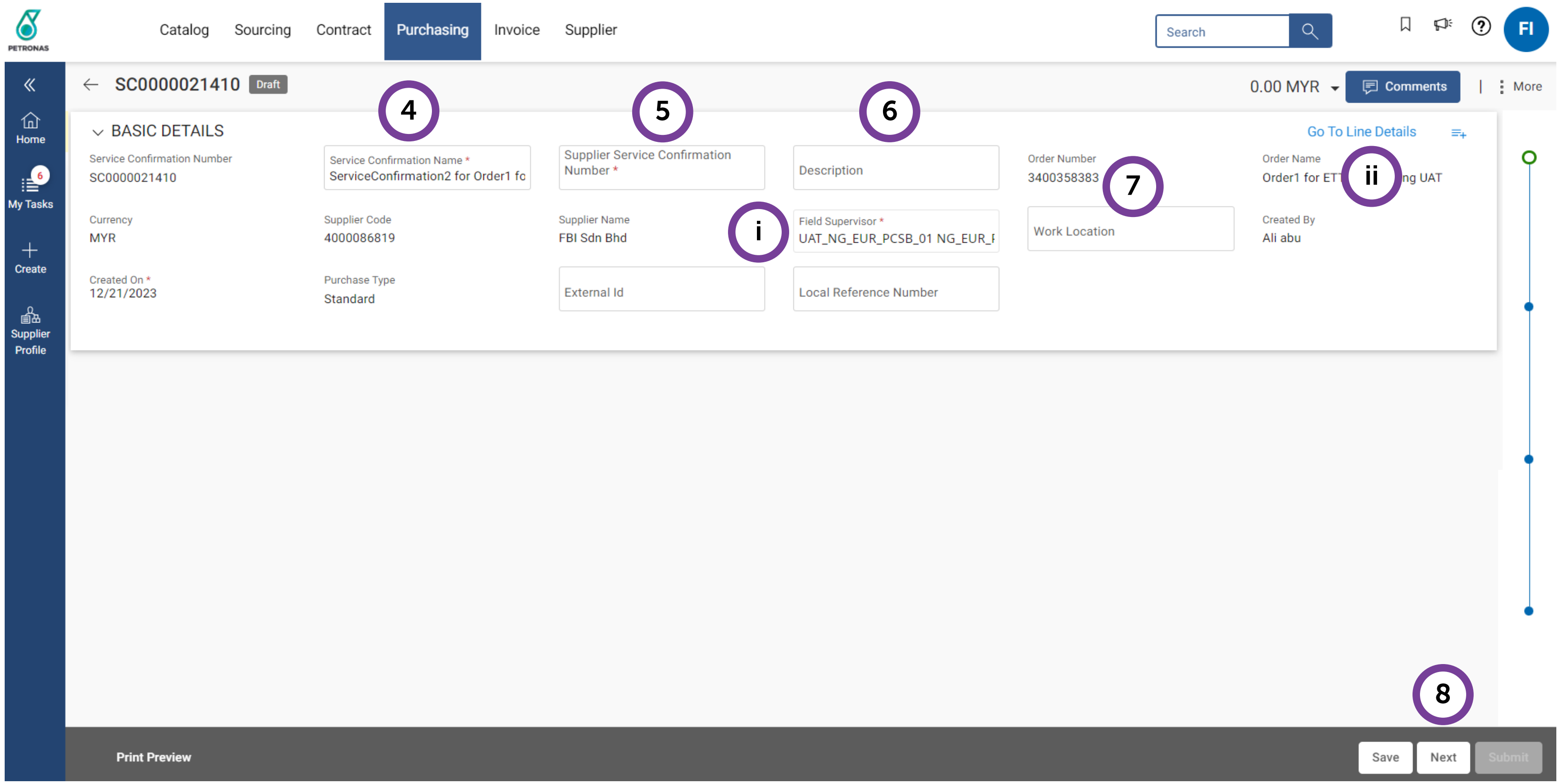
3	In the PO document, ensure all PO details are correct and accurate based on PETRONAS request and requirement prior to creation of Service Confirmation (SC). Once Supplier completes validating the Purchase Order Details, go to **More Actions** at the top right of screen and click on **Create Service Confirmation**. Note: SC is not Invoice. SC is required to confirm that work has been executed according to agreed scope/specification.

Supplier is unable to Create Invoice submission until SC has been submitted to user for verification and approval.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

Service Confirmation details will be displayed.



4	Supplier to insert the **Service Confirmation Name.**
5	Supplier to insert the **Service Confirmation Number.**
6	Supplier to insert the **Service Confirmation Description.**
7	Supplier to insert the **Service Confirmation Work Location.**
i	Supplier to confirm the **field supervisor** (user) assign for SC verification process.
8	Click on **Next** button to proceed with next section.
ii	Click on **Go to Line Details** to jumps to Line Details section. Go To Line Details

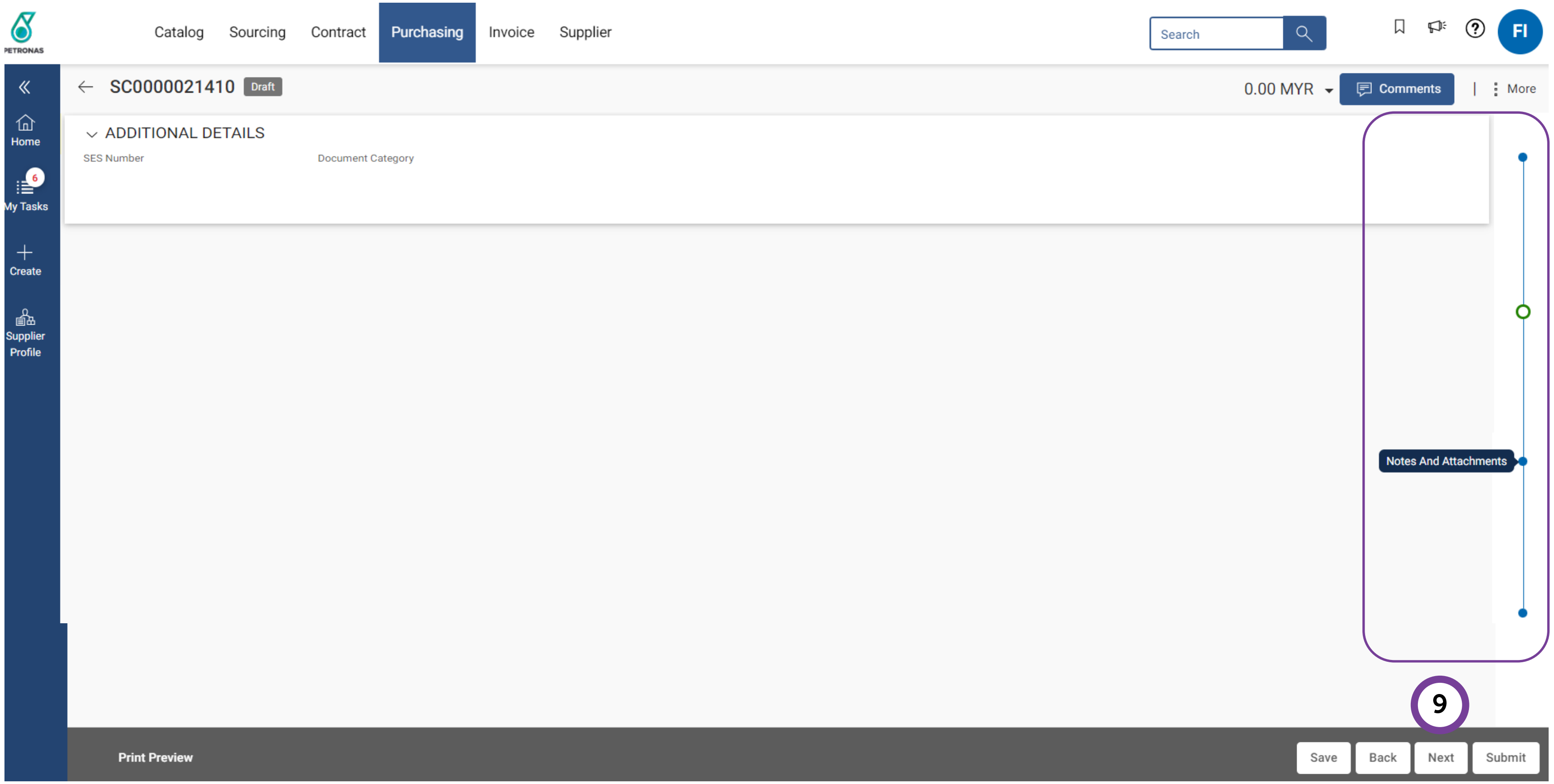
Supplier to ensure that all the basic details entered during Service Confirmation creation are correct and accurate based on the service completed.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note

2 Service Confirm-ation (Rate Based)

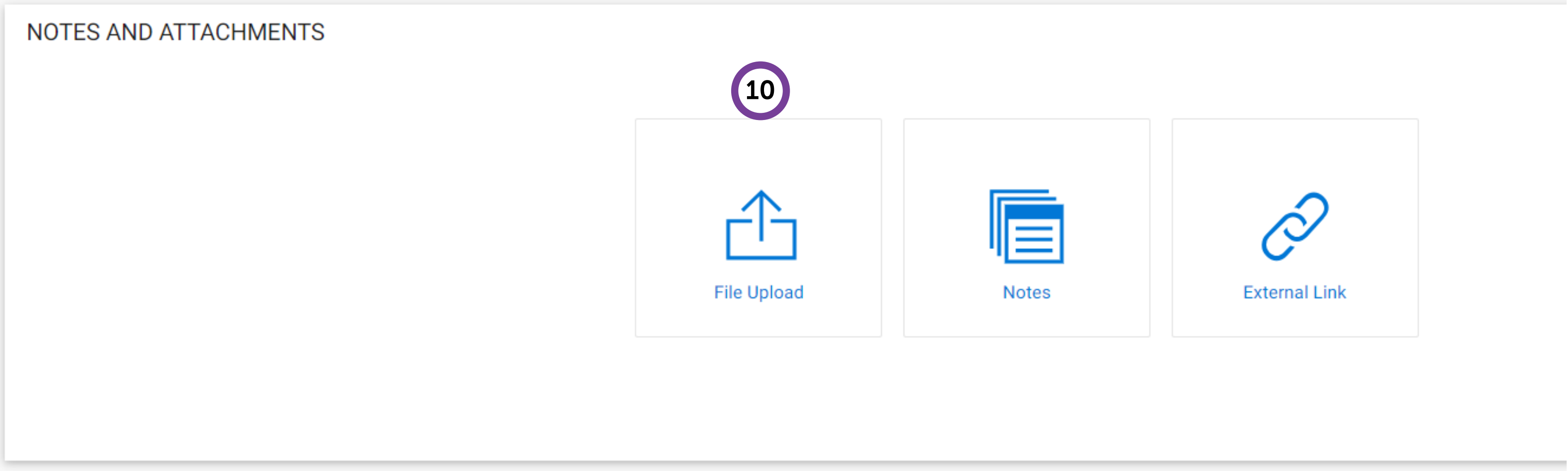
Job Completion Ticket (JCT) or other relevant supporting documents to showcase the completion of work must be uploaded by suppliers.



9	Skip this section and click on Next button to go to Notes and Attachment section. Alternatively, supplier can click on the milestone line on the right page to toggle between sections.

Create Service Confirmation (Rate Based)

Job Completion Ticket (JCT) or other relevant supporting documents to showcase the completion of work must be uploaded by suppliers.



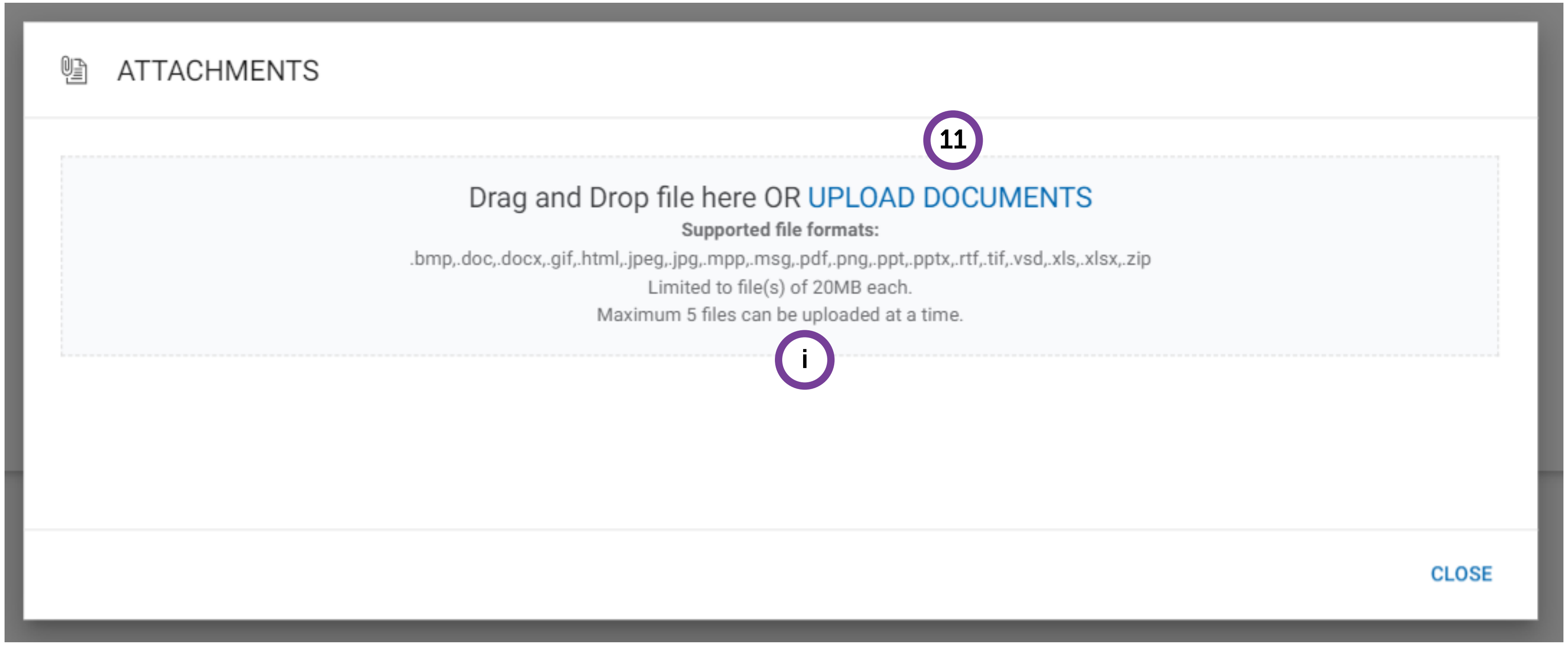
10	Under the Notes and Attachments section, use the '**File Upload**' feature to upload supporting documents.

Supporting documentation (e.g. JCT) is a mandatory requirement by PETRONAS for reference during Service Acceptance Creation.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note — 2 Service Confirm-ation (Rate Based)

Job Completion Ticket (JCT) or other relevant supporting documents to showcase the completion of work must be uploaded by suppliers.



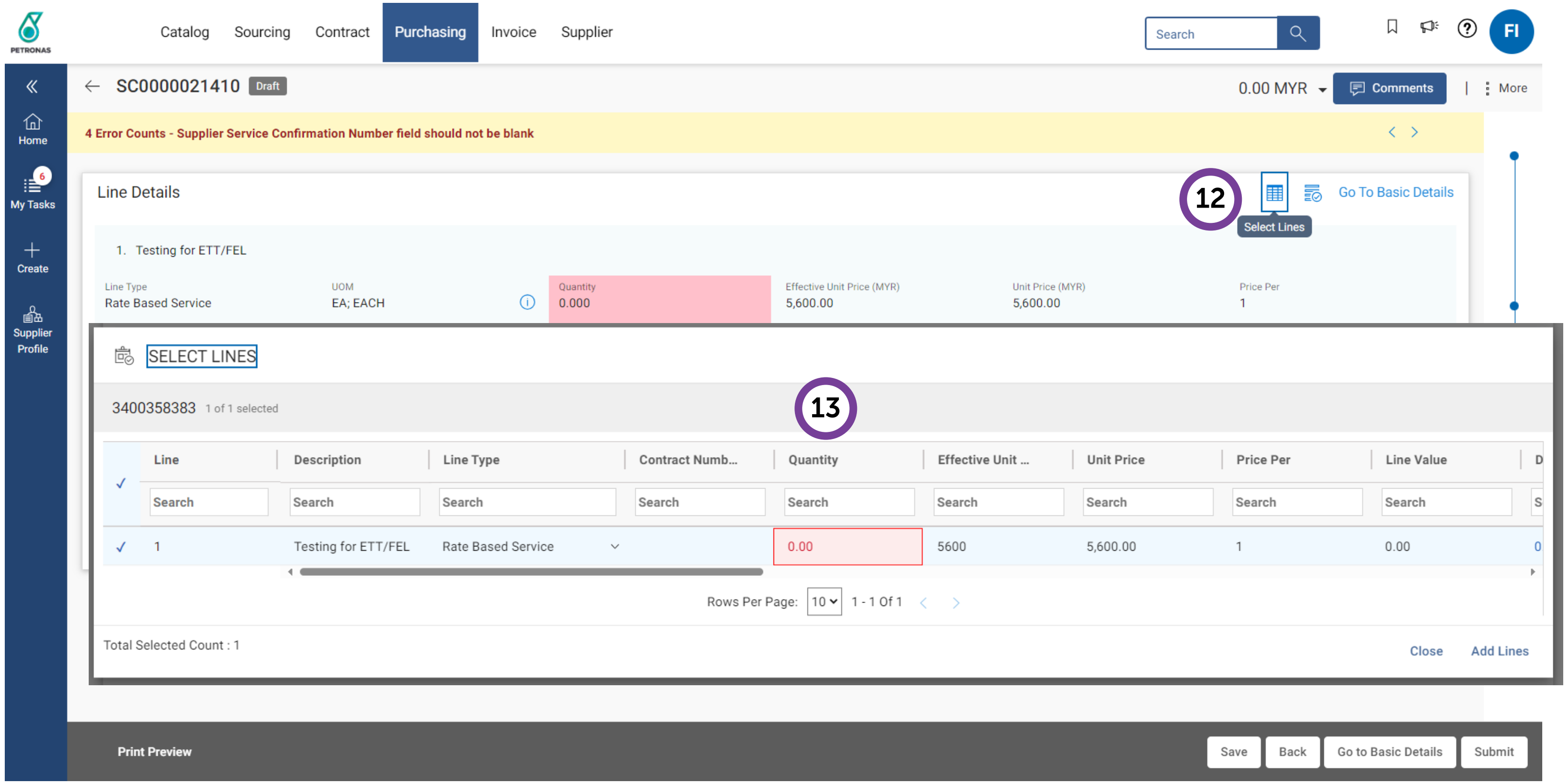
11	Click 'Upload Documents' to upload relevant supporting documentation.
i	Documents that supplier wish to upload must be in the accepted format type and must not exceed 20MB.

Attachment wish to be uploaded must be in the accepted format type in GEP SMART as per item i) and must not exceed 20MB.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note — 2 Service Confirm-ation (Rate Based)

Line items details will be displayed for Supplier's confirmation.

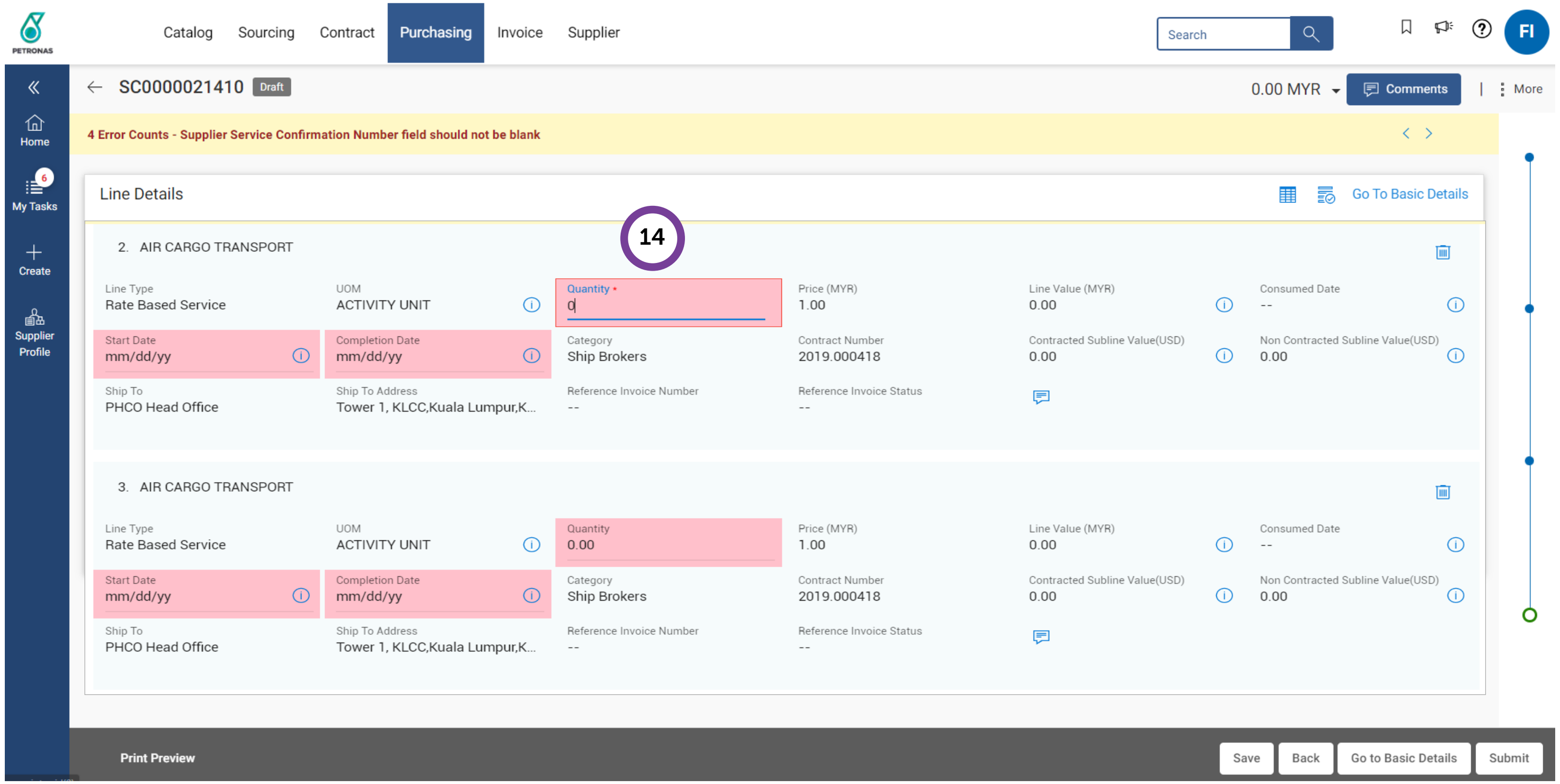


12	Click on the **Table icon** to **view all the lines available** in the PO document.
13	Supplier able to view all the lines available in PO and edit the **Quantity, Start Date and End Date** before adding to the Service Confirmation. **Note**: Maximum decimal places accepted for Quantity field is 3 decimal places.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note — 2 Service Confirm-ation (Rate Based)

Line items details will be displayed for Supplier's confirmation.



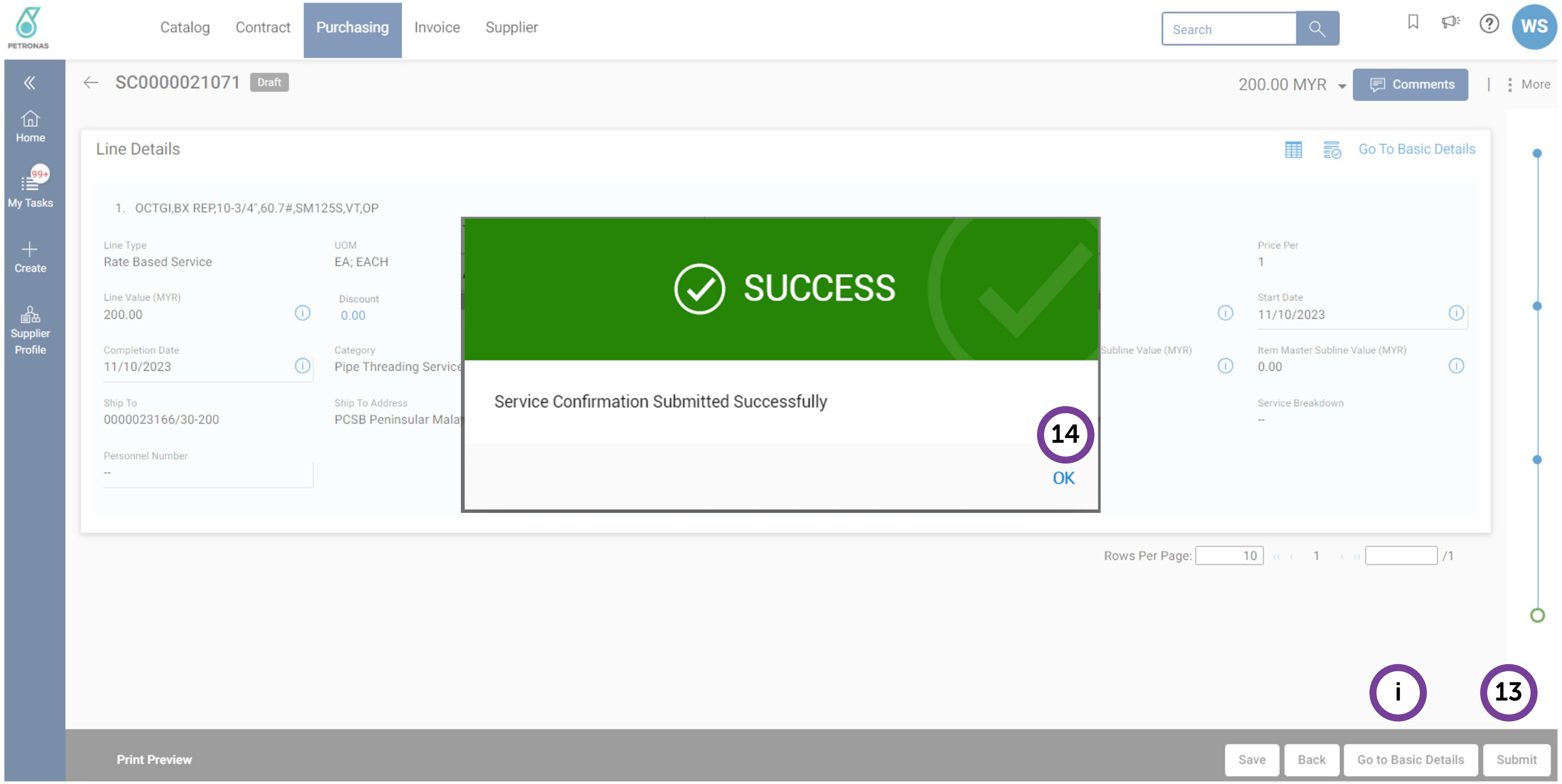
14	Alternatively, Supplier can **enter the Quantity consumed, Start Date and End Date** at each line item in the Service Confirmation document. Once completed, please check to make sure accurate information has been entered. **Note**: Maximum decimal places accepted for Quantity field is 3 decimal places.

Supplier to ensure that all the details entered during Service Confirmation creation are correct and accurate based on the Service Completed.
If Supplier wants to only create Service Confirmation for selected line items, Supplier can remove the other line items by clicking on Delete icon for each.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note
2 Service Confirm-ation (Rate Based)

Supplier to proceed with submission of Service Confirmation.

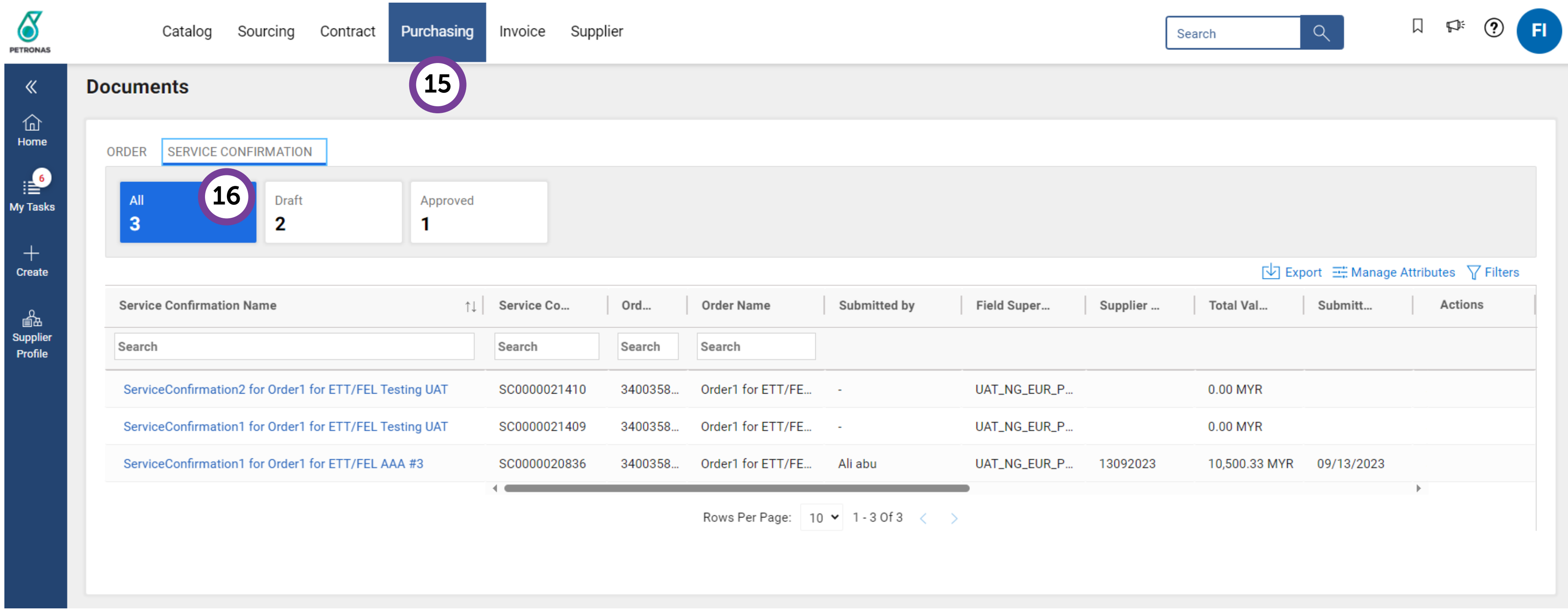


13	Click on '**Submit**' button. It is supplier responsibility to ensure that all the info, details, notes and attachment submitted are correct and completed based on the actual service completion.
14	Success status will appear to confirm successful creation of Service Confirmation. Supplier will receive email notification once the Service Confirmation has been Accepted/Rejected by User.
i	Supplier can go back to Basic Details section to check and re-validate information prior to submission.

Create Service Confirmation (Rate Based)

1 Goods Acceptance & Return Note — 2 Service Confirm-ation (Rate Based)

The status of the Service Confirmation will be displayed upon successful creation of Service Confirmation.



15	Supplier will be able to view and track the status of Service Confirmation (SC) from '**Purchasing**' tab.
16	Under Service Confirmation section, supplier able to see all SC that are available. Approved SC is required prior to creation of Payment Request.

Once service confirmation is created, it will require PETRONAS to conduct Service Acceptance subject to the completeness of the Service Confirmation against the PO details and requirements.
DO NOT create Service Confirmation (SC) from 'Create' icon in Landing Page. Creation of SC shall be from Acknowledged Purchase Order (PO)

Application Deep Dive

Invoice Management & Payment

Payment Requests can be initiated by supplier upon Service Confirmation and Good Acceptance by PETRONAS.

Learning Objectives

Suppliers will be able to create Payment Request in GEP SMART

1 Create Payment Request (For Service Confirmation)

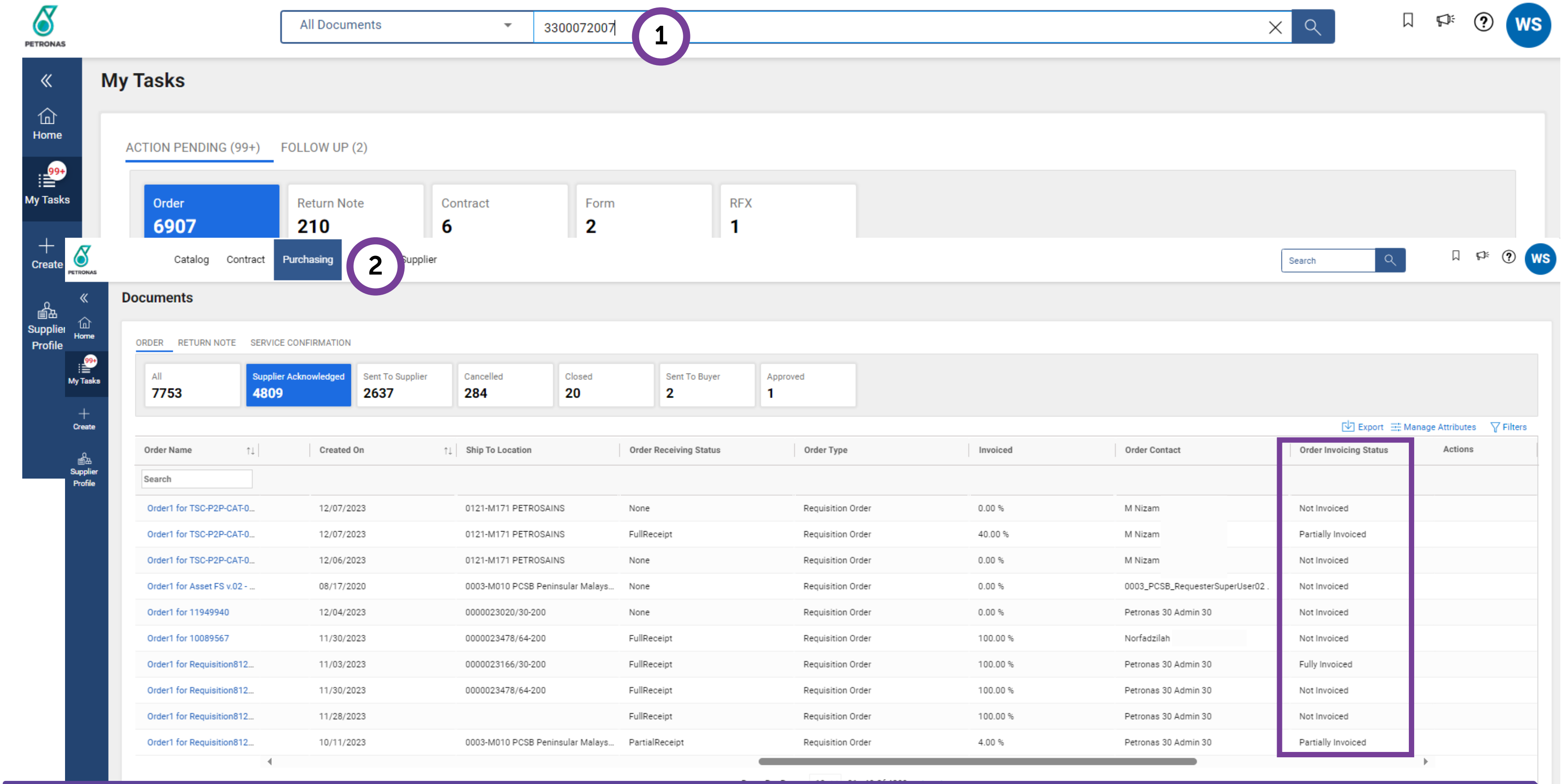
2 Create Payment Request (For Receipt)

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier can search the Purchase Order with approved service confirmation.



1	Supplier to search for the PO number which they wish to create a Payment Request for.
2	Alternatively, supplier can go to '**Purchasing**' section from home page, under '**Order**" tab, supplier can select the PO that has completed to create Payment Request. ORDER Note: Supplier may refer **to Order Invoicing Status** column to further determine which PO to create Payment Request. **Not Invoiced** – No payment request created. **Partially Invoiced** – Payment request created for certain line item in PO. **Fully Invoiced**– payment request created. **Over Invoiced** – excess payment request created

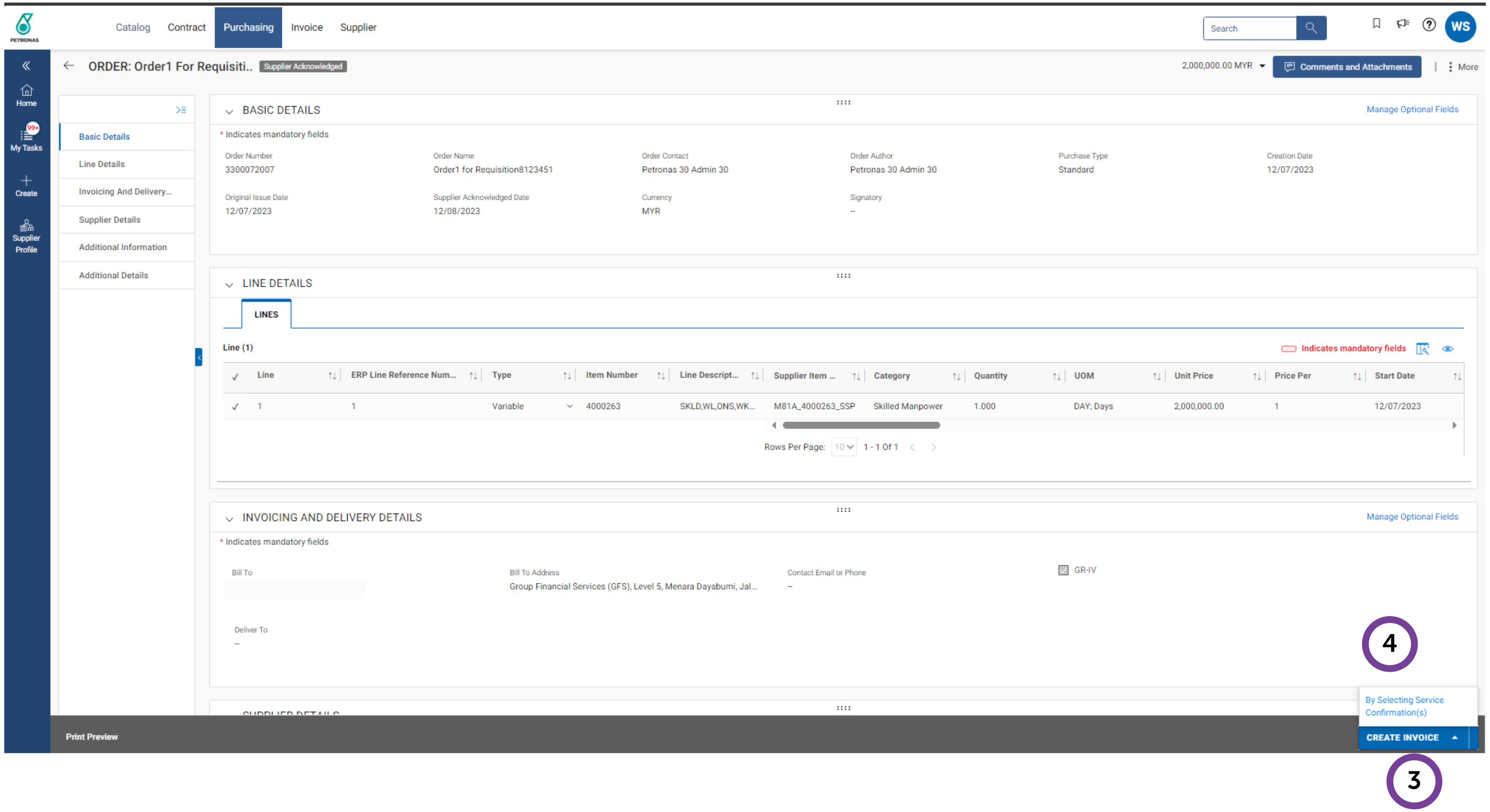
Supplier may create Payment Request once Service Confirmation has been approved by Field Supervisor/User for Service line-item purchases. **DO NOT** use 'Create' button to create Invoice. Creation of Invoice shall be from Approved Service Confirmation.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier can verify and create the invoice.

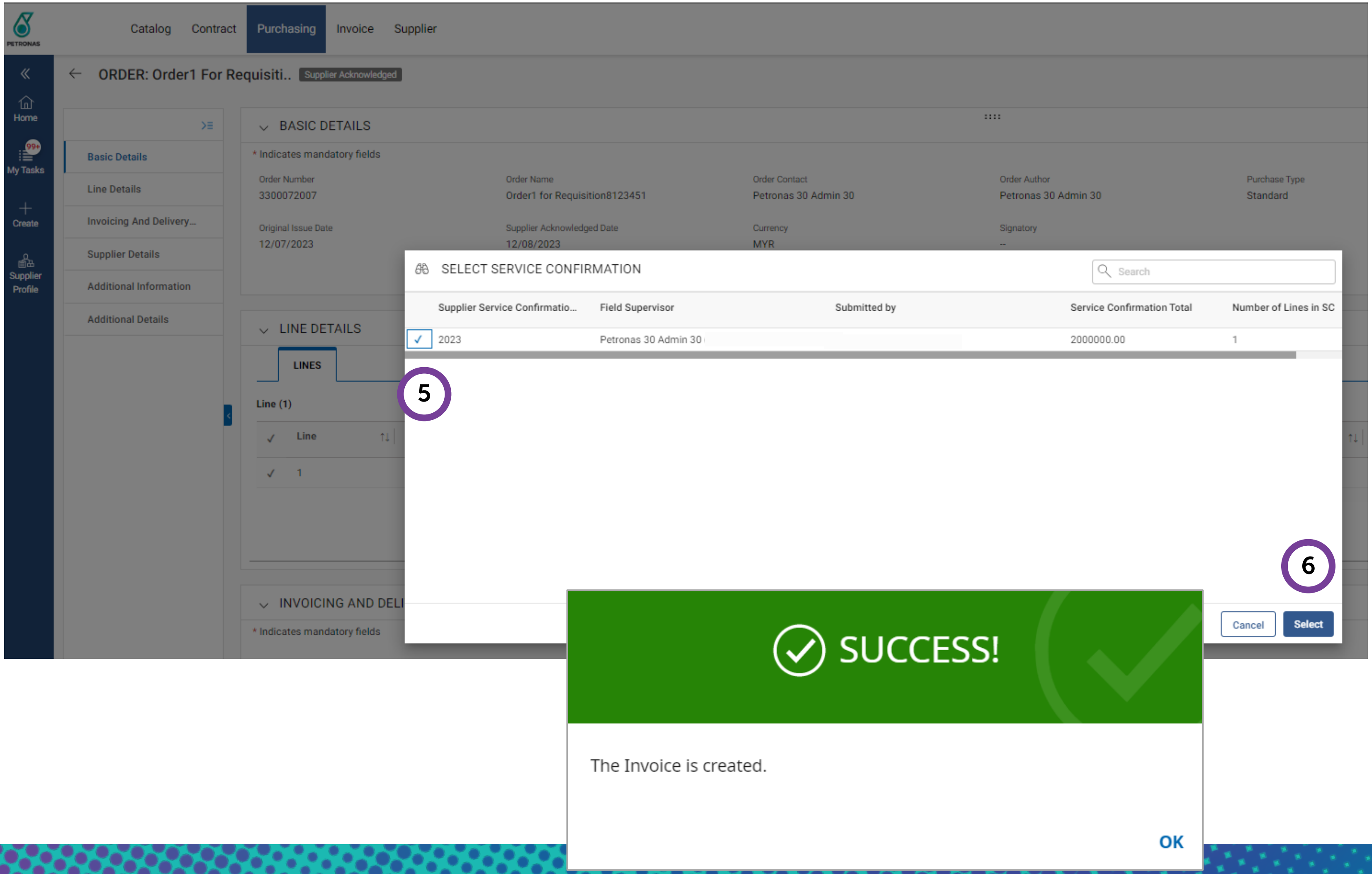


3	In the PO document, supplier need to click on **Create Invoice** at the bottom right of the page. A pop up will appear with two options (Only applicable if PO has both Service and Material line items):  If PO only has Service line items, only '**Create Invoice for Service Confirmation**' will appear. Similarly, if PO only has Material line items, only '**Create Invoice for Receipt'** will appear.
4	Click '**Create Invoice for Service Confirmation**' to proceed.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)
2 Payment Request (For Receipt)

For Purchase Orders with service item category, suppliers are required to create the payment request based on the Service Confirmation document.



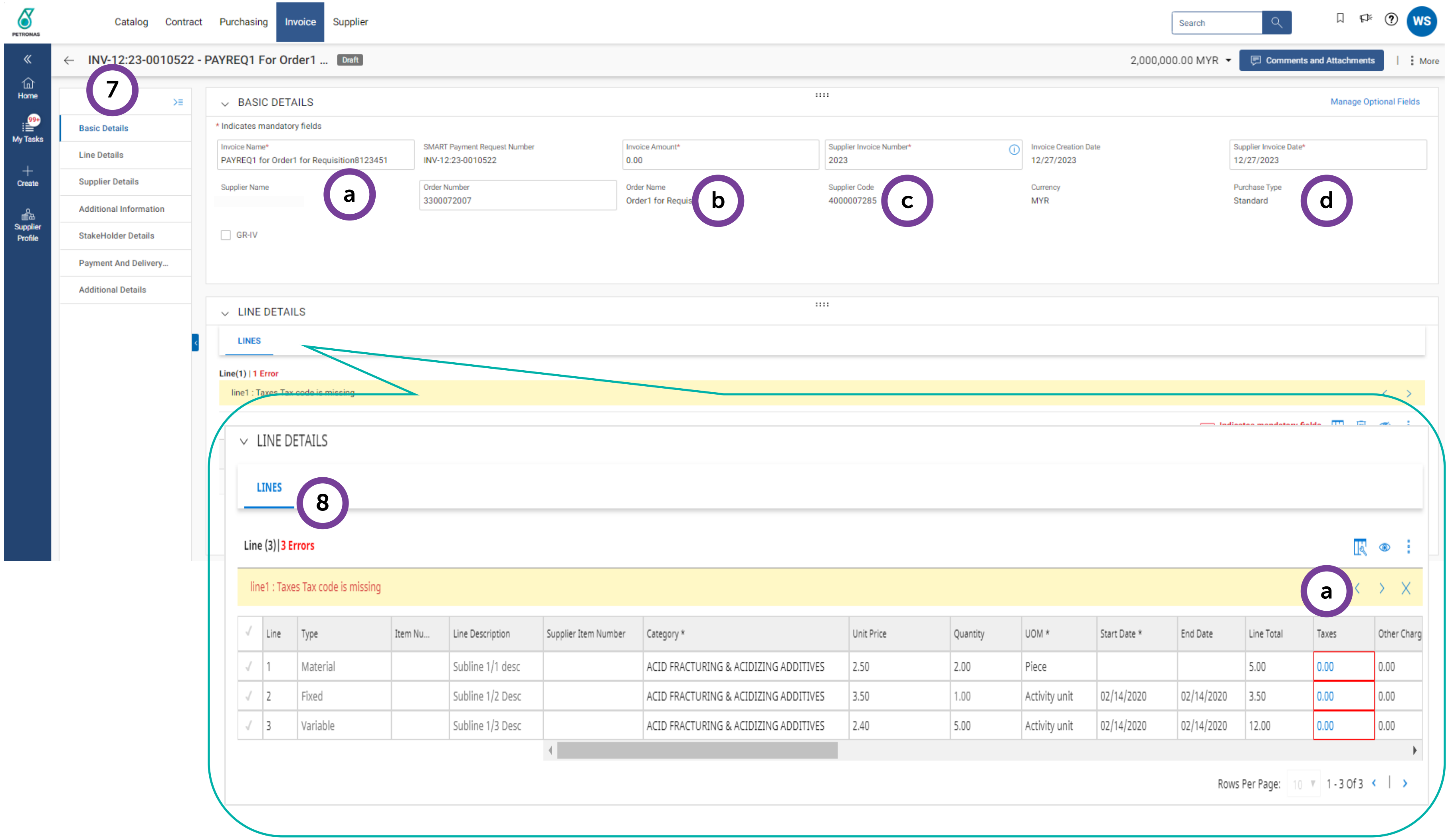
5	A list of '**Service Confirmations**' will appear. Select the applicable one. Note: 1 PO may have multiple SC depending on payment arrangement agreed.
6	Click '**Select**' to confirm. Success status will appear to show the invoice has been created and supplier will be re-directed to Invoice page.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier will then proceed to enter the necessary details in the invoice.



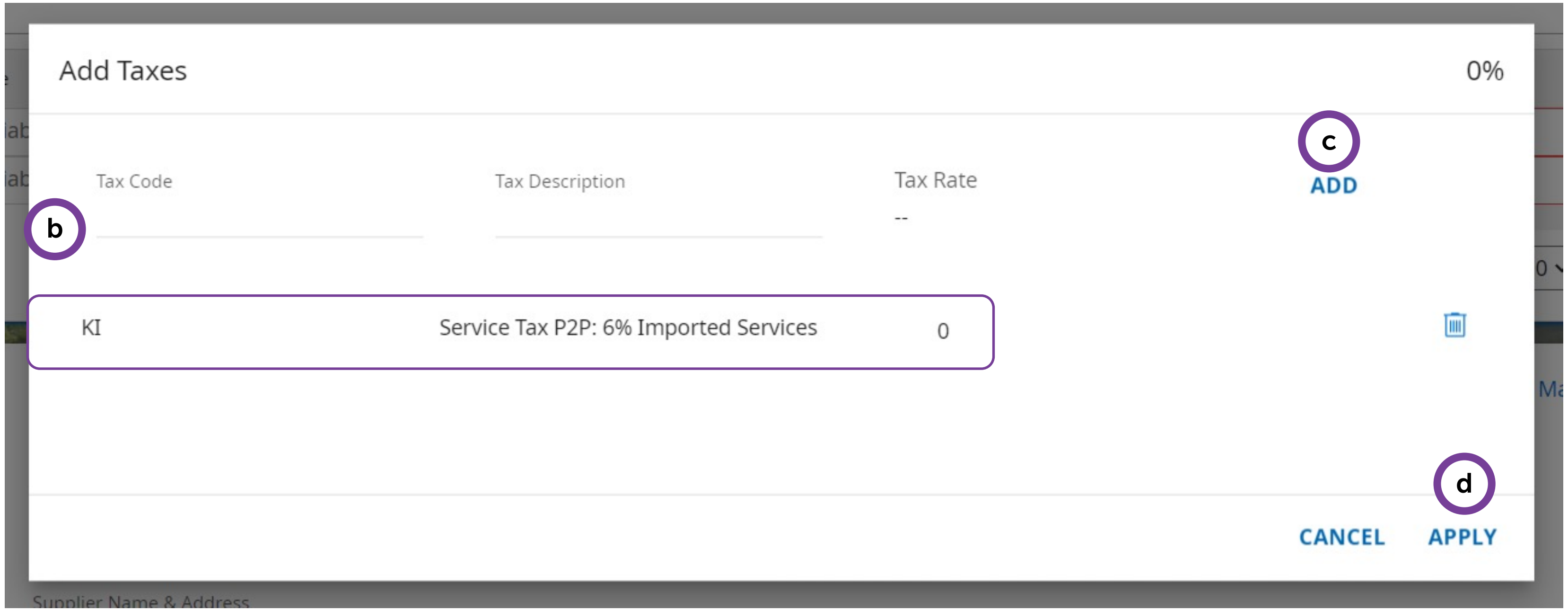
7	In 'Basic Details', fill in details in all required fields for the invoice.
a	Insert the Invoice Name.
b	Insert the Invoice Amount.
c	Insert the Supplier Invoice Number. The Supplier Invoice Number <u>must be unique</u> to each transaction. Due to character limit within the system, please <u>ensure that the invoice number you submit adhere to a MAXIMUM of sixteen (16) character invoice number per invoice</u>, including spaces and special characters.
d	Insert the Supplier Invoice Date.
8	Under 'Line Details', system will prompt error message to insert tax code for each line item.
a	By default, taxes value is 0.00 and supplier need to select the correct tax code from drop down list. Click on the '0.00'.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Tax categories will be available at each of the line item.



It is Supplier's responsibility to ensure that the right tax code and tax treatment is being selected and declared based on actual job completed.

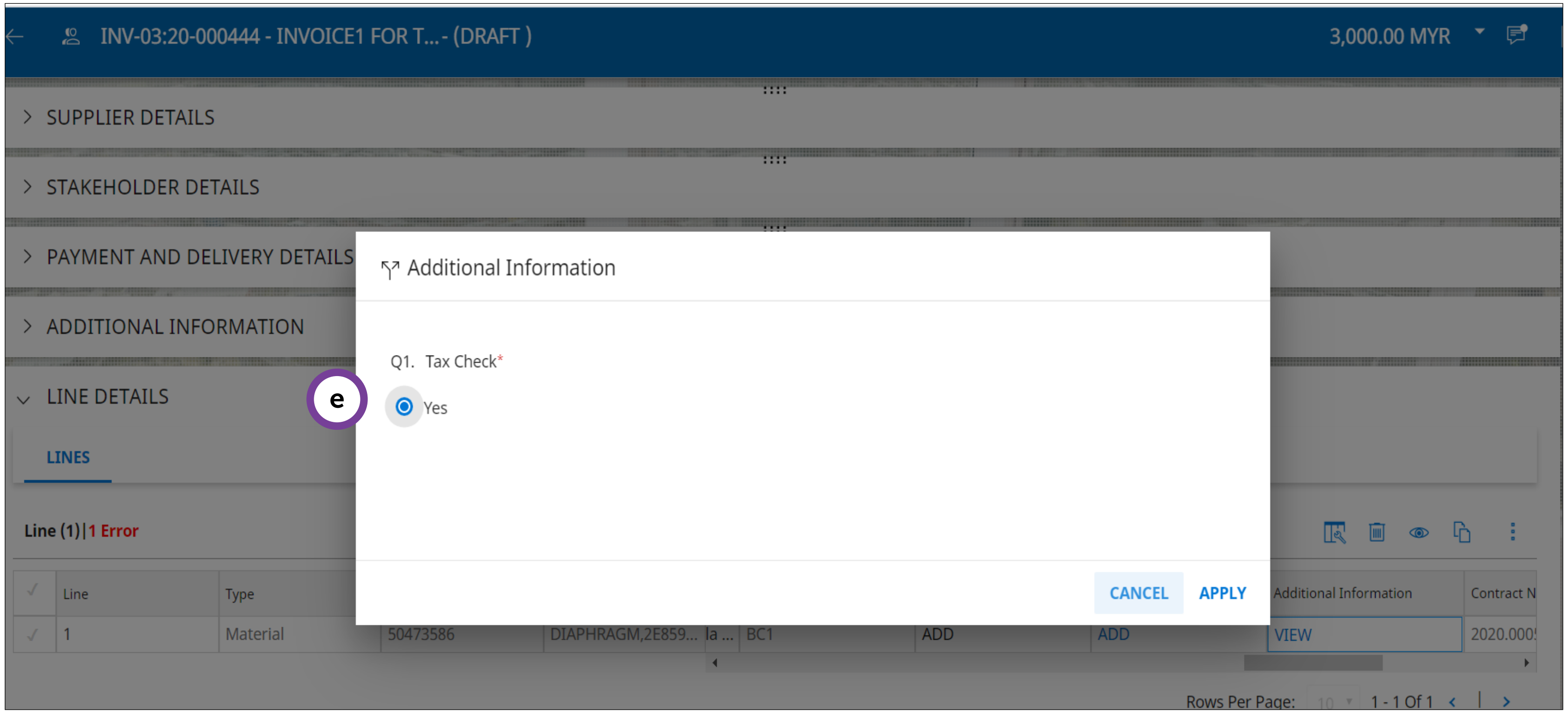
Supplier can only charge for category of tax registered with Royal Malaysian Customs Department.

b	Insert the applicable Tax Code as per the available options: • Sales Tax P2P : 0% Default (B0) • Sales Tax P2P: Non Taxable (B1) • Sales Tax P2P: 5% (BA) • Sales Tax P2P: 10% (BB) • Service Tax P2P : 0% Default (K0) • Service Tax P2P: 6% (KA) • Service Tax P2P: 6% Imported Services (KI) • Service Tax P2P: 8% Local supplier (KB) • Service Tax P2P: 8% Imported Services (KJ) Note: *For full definition of the tax code, kindly refer to here*
c	Click 'Add'. A line will appear below the fields.
d	Once satisfied with the tax code selections, click on 'Apply'. Repeat the same step for each line item. Note: *Only one tax code is allowed to be selected per line item.*

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation) — 2 Payment Request (For Receipt)

Tax check will be available at each of the line item in the 'Additional Information' field.

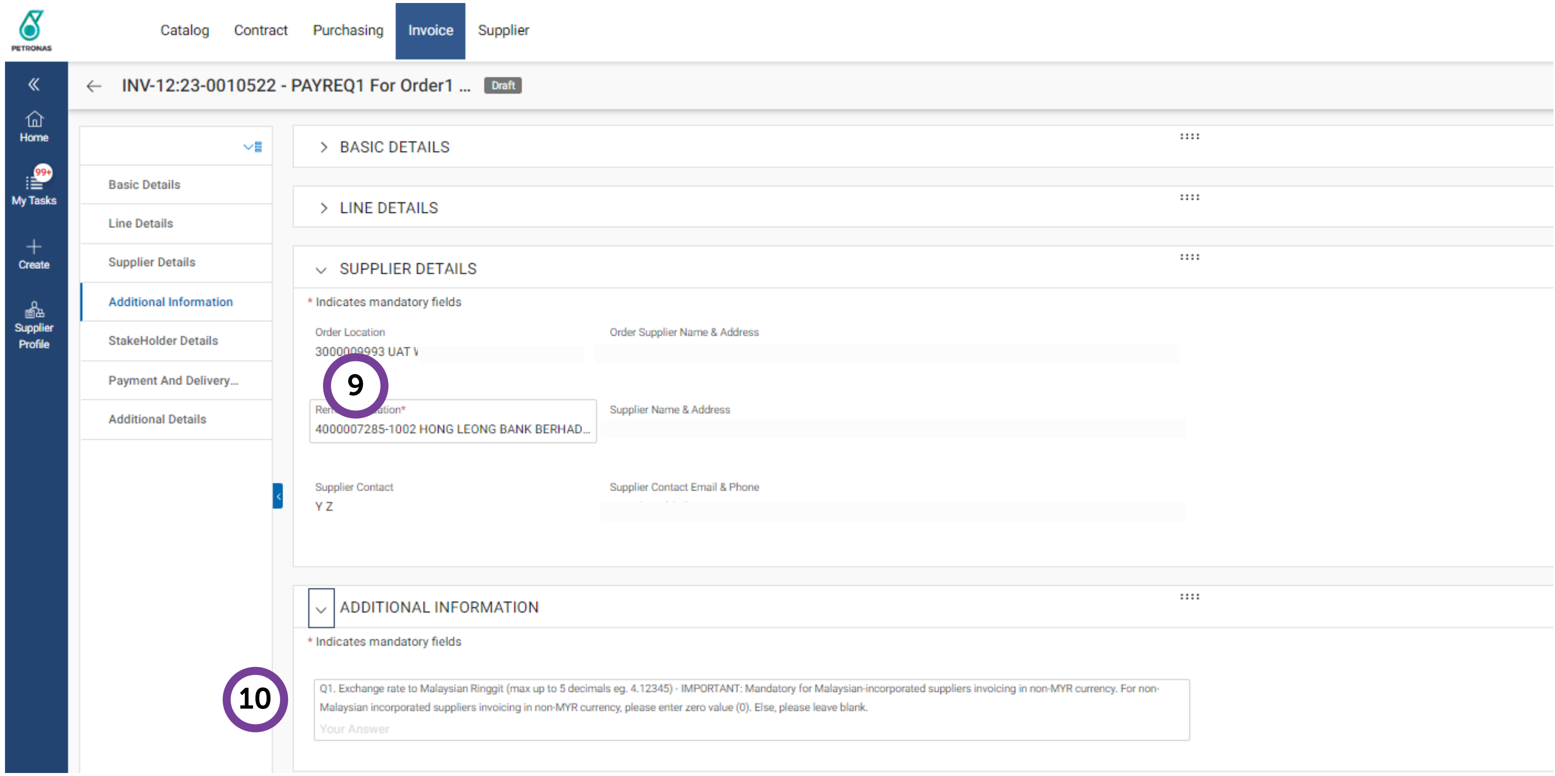


e	Within the same '**Line Details**' section, scroll to the right and click on '**View**' in **Additional Information** column. Select **Yes** under Tax Check once satisfied with the tax code selection and click on Apply at the bottom right of the pop up. Repeat the same step for each line item.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation) — 2 Payment Request (For Receipt)

Supplier will then proceed to enter the necessary details in the invoice.



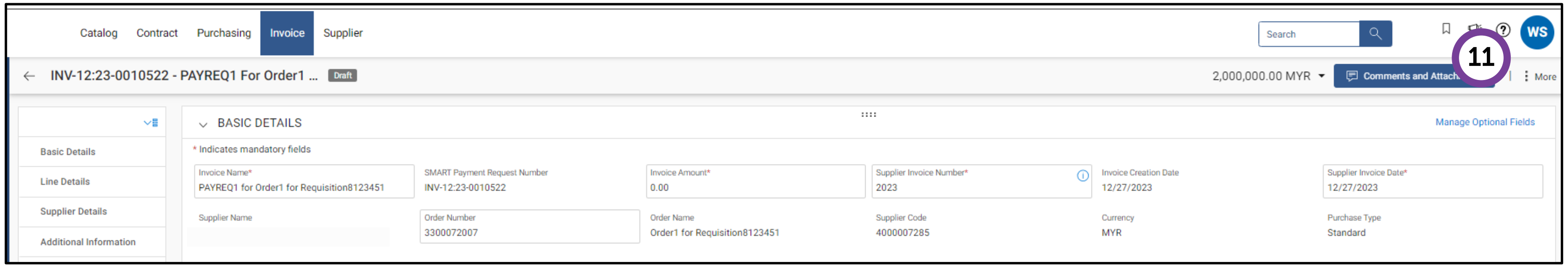
9	Supplier may select preferred Remit To Location (Supplier Bank Account). Note: For Suppliers under Vendor Financing Program (VFP), there will be a bank account validation to ensure accurate bank account is captured.
10	In '**Additional Information**', insert the Exchange Rate if invoice document currency is non-MYR. Note: 1. For non-Malaysian incorporated suppliers invoicing in non-MYR currency, please enter zero value (0). Otherwise, please leave blank. 2. Invoice submission in SMART will be auto-rejected if the exchange rate input by the Supplier is more than ± 20% compared to daily exchange rate.

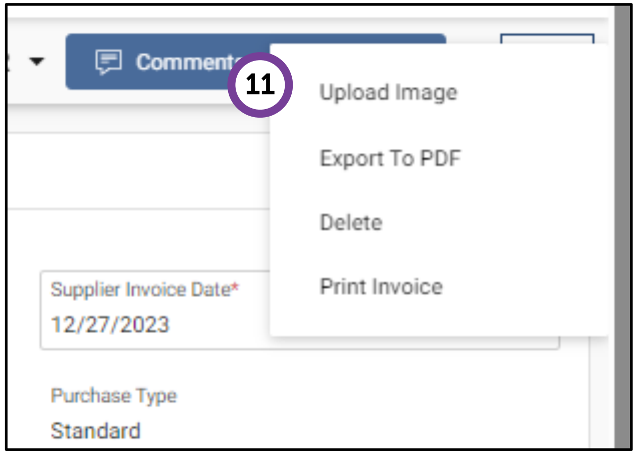
Remit to Location is Supplier Bank Account details that was key-in by supplier during Supplier Profile creation under Location Information section. Supplier is required to update Supplier Profile with relevant Remit to Location if the field is blank.

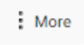
Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)
2 Payment Request (For Receipt)

Supplier is required to upload a scanned copy of the original invoice.





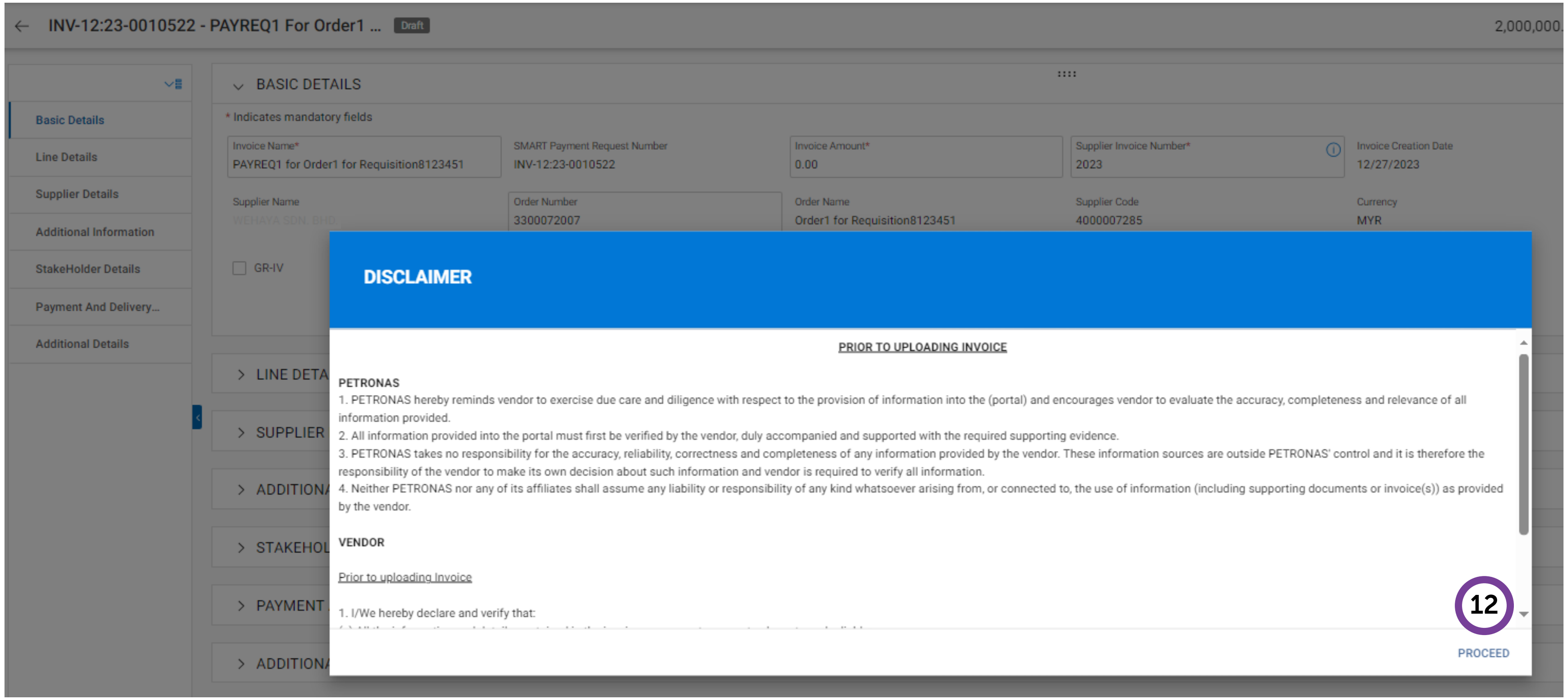
11	Click on '**More**' button at the top right corner of the screen and click on '**Upload Image**' to upload scanned copy of the Original Invoice document.  The scanned copy of the Original Invoice is a mandatory requirement by PETRONAS. Kindly ensure the value of the Original Invoice uploaded is the same as per payment request created in GEP SMART.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Disclaimer will be displayed prior to upload of scanned Invoice documents.



12	Click '**Proceed**' upon reviewing the disclaimers for uploading the scanned Invoice.

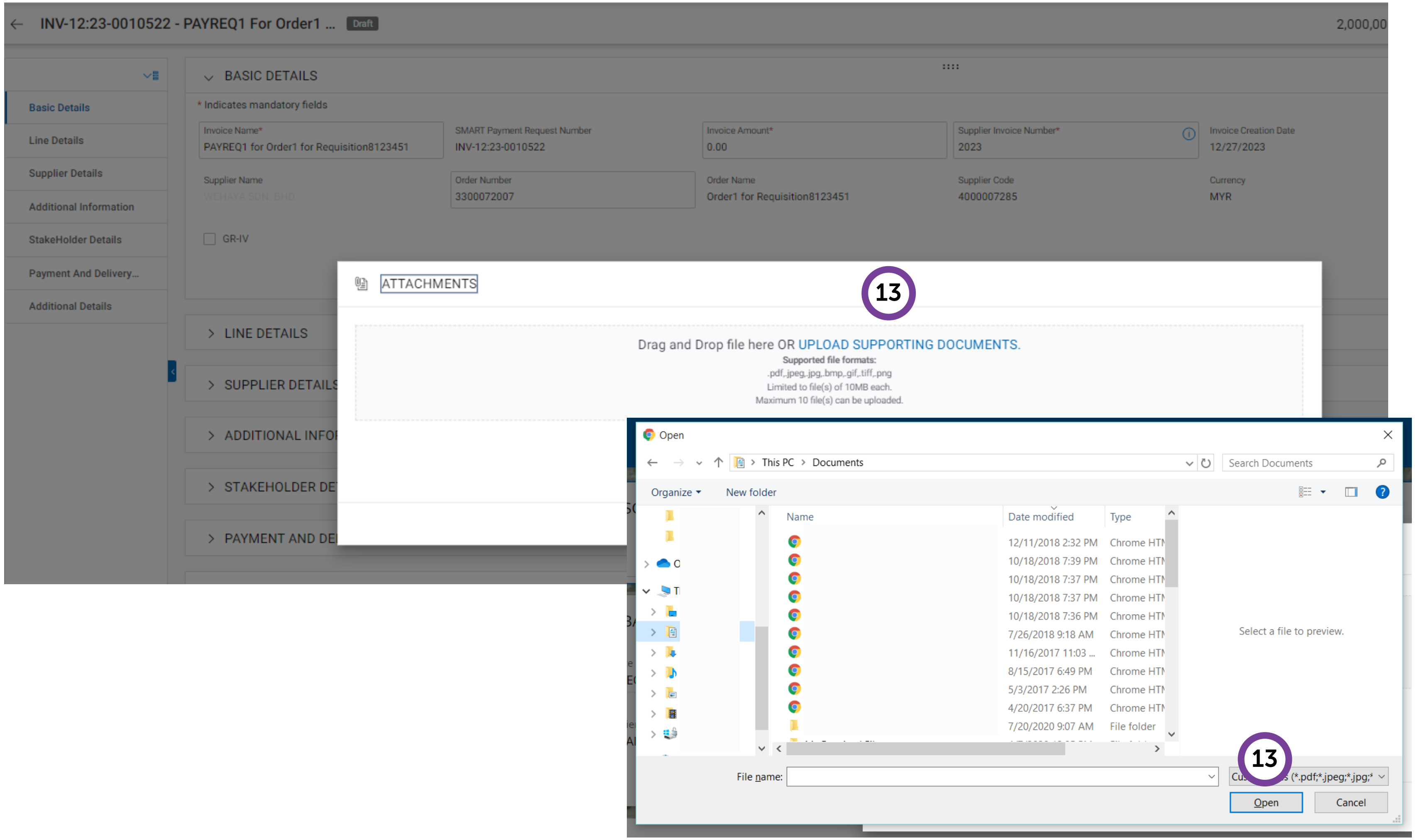
It is supplier's responsibility to ensure that all the document attached is correct and accurate based on actual job completion according to PO requirements and deliverables.

Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

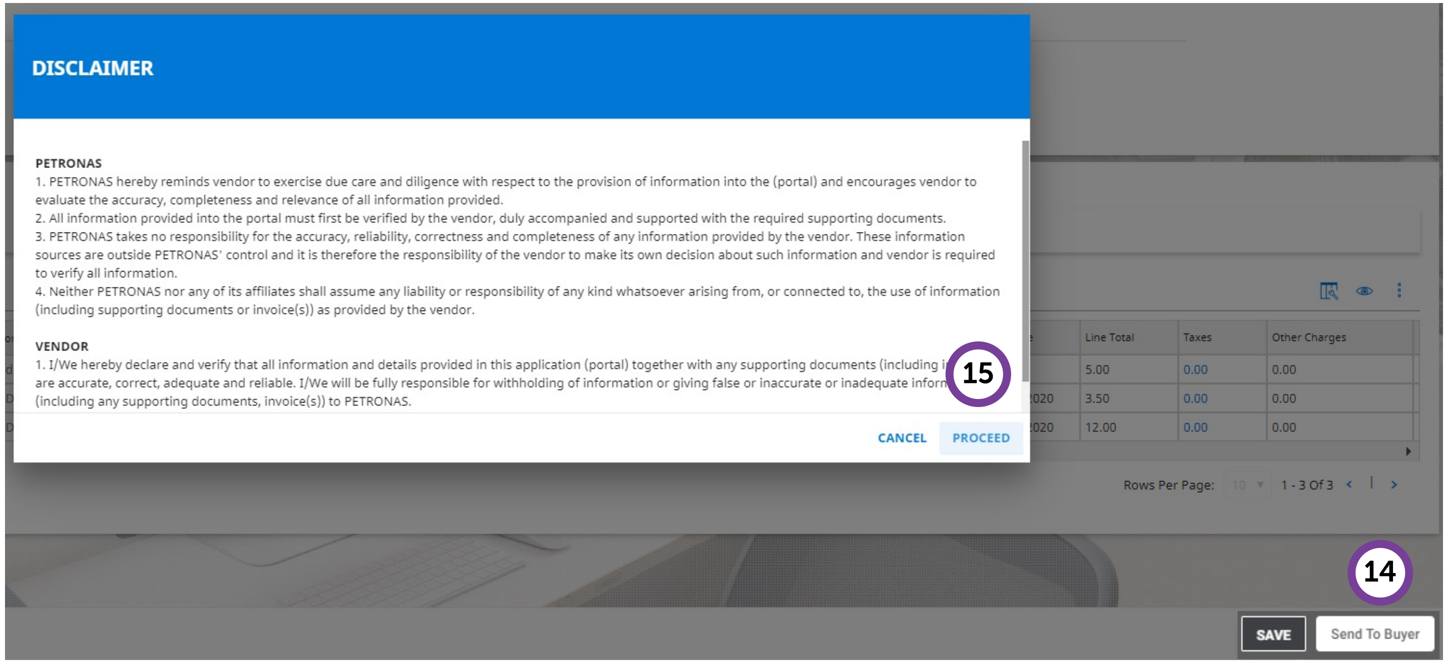
Supplier to upload the scanned Tax Invoice.

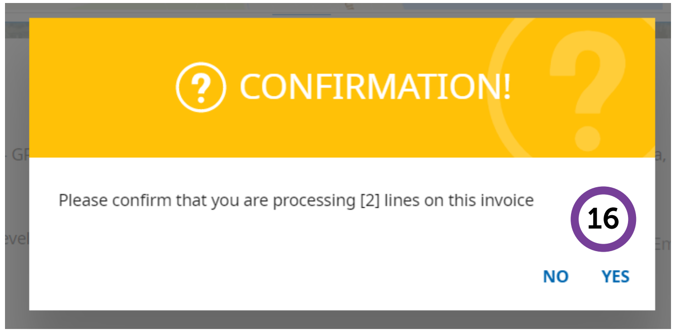


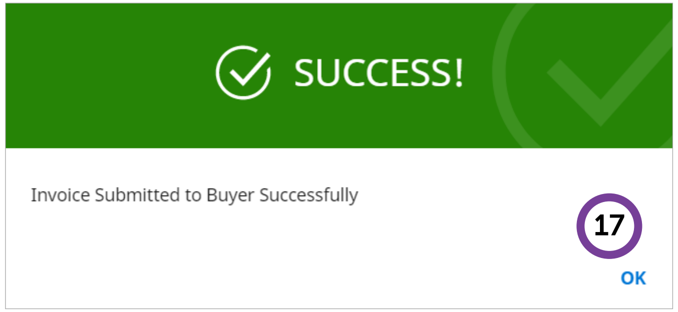
13	On the pop up, click '**Upload Documents**' and select the scanned invoice to be uploaded, then click Open.

Create Payment Request (For Service Confirmation)

Supplier to proceed with submission of Payment Request to PETRONAS. Another disclaimer for invoice submission will be displayed.







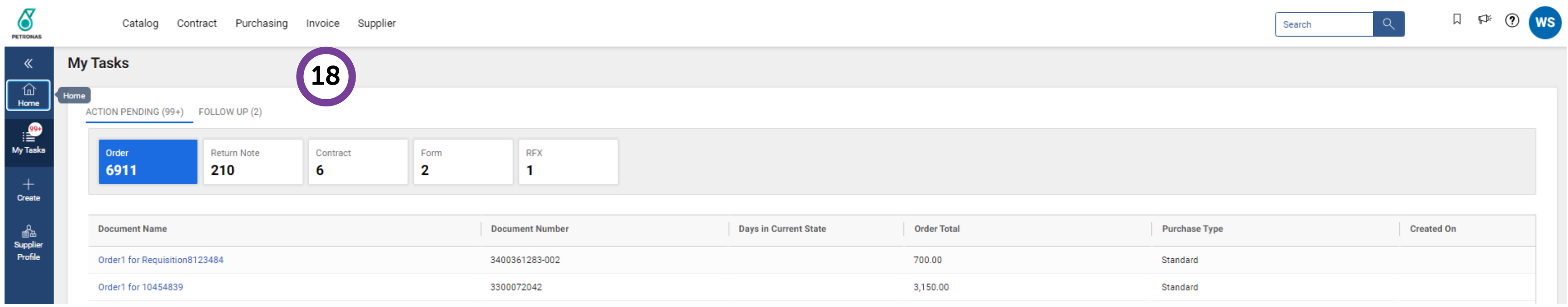
14	Click '**Send to Buyer**' once satisfied with all the details and attachments. 
15	Click '**Proceed**' upon reviewing the disclaimers for Invoice submission.
16	A confirmation pop up will appear to confirm the number of line items that will be processed in this invoice. Click '**Yes**' to proceed.
17	Success status will appear upon successful submission of Payment Request.

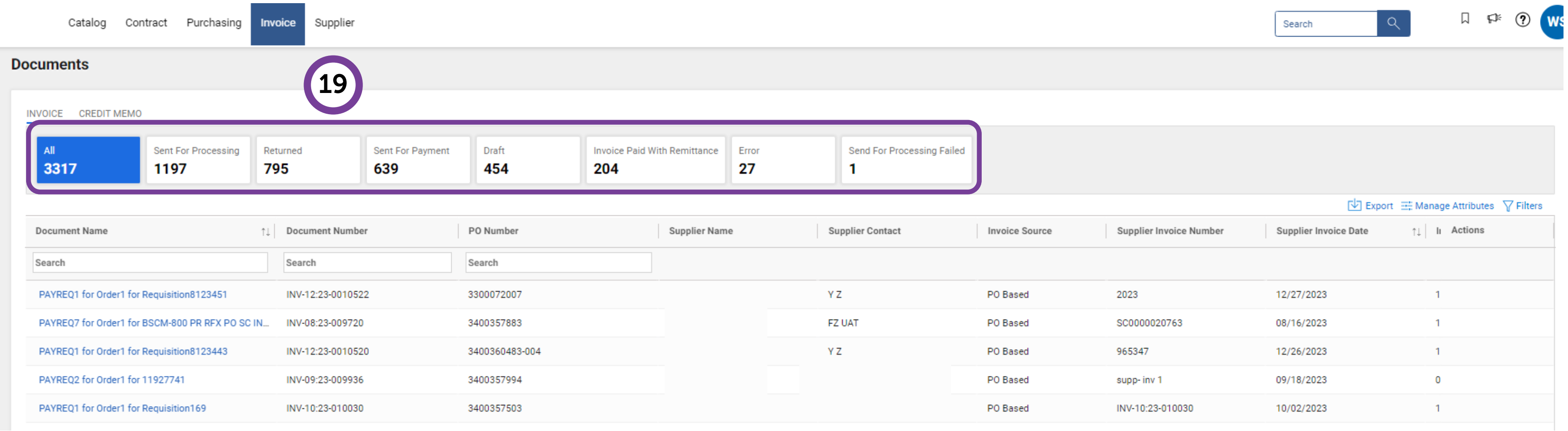
Create Payment Request (For Service Confirmation)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

The status of the Payment Request will be displayed accordingly.





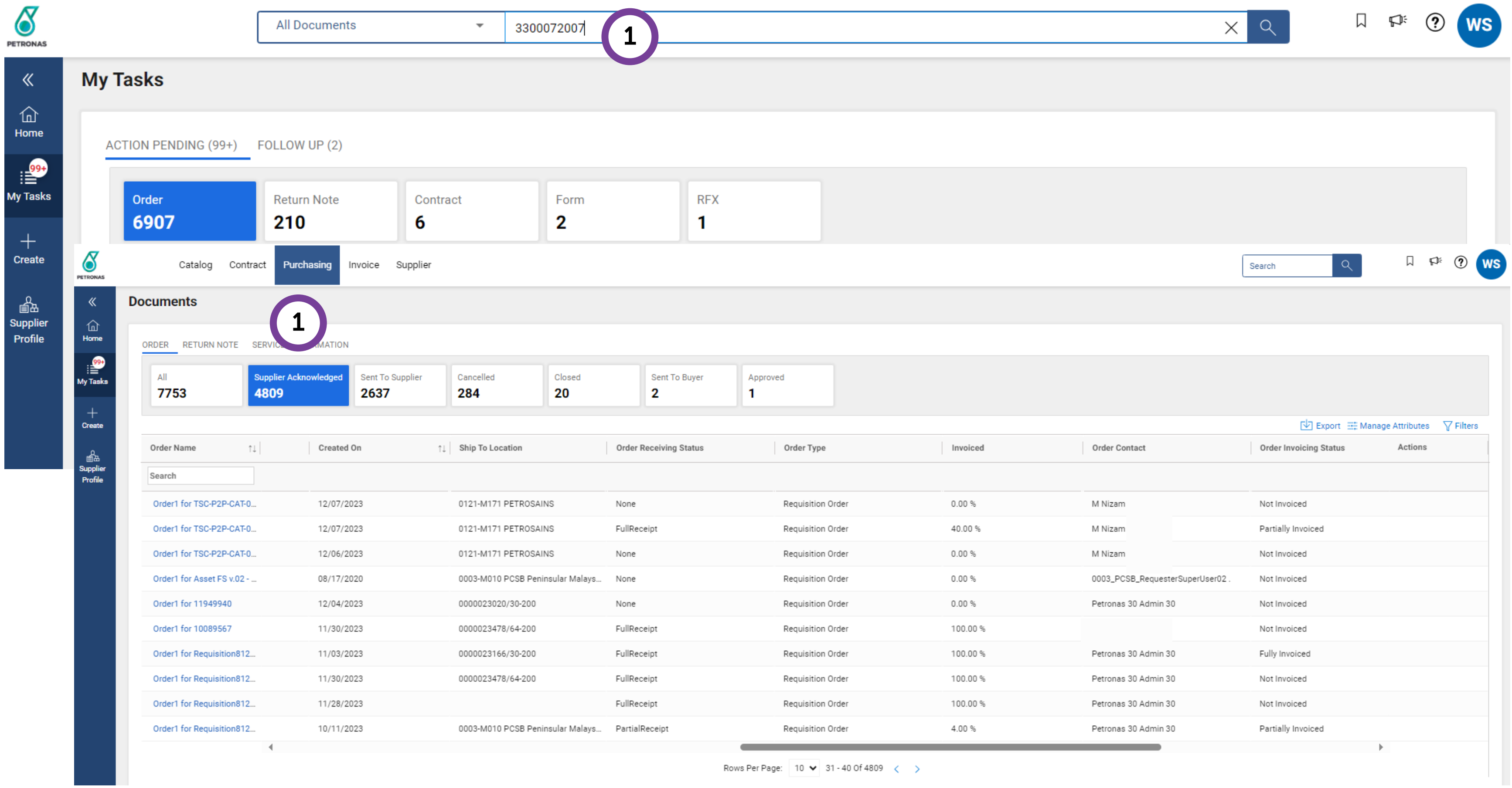
18	Supplier will be able to view the status of the Payment Request from ‘**Invoice**’ section at homepage.
19	Status of Payment Request will be displayed accordingly.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

For Purchase Orders with material line-item category, supplier are required to create the payment request from the Purchase Order itself.



1	Supplier to search for the PO number which they wish to create a Payment Request for. Alternatively, supplier can go to ‘**Purchasing**’ section from home page, under ‘**Order**” tab, supplier can select the PO that has completed to create Payment Request.

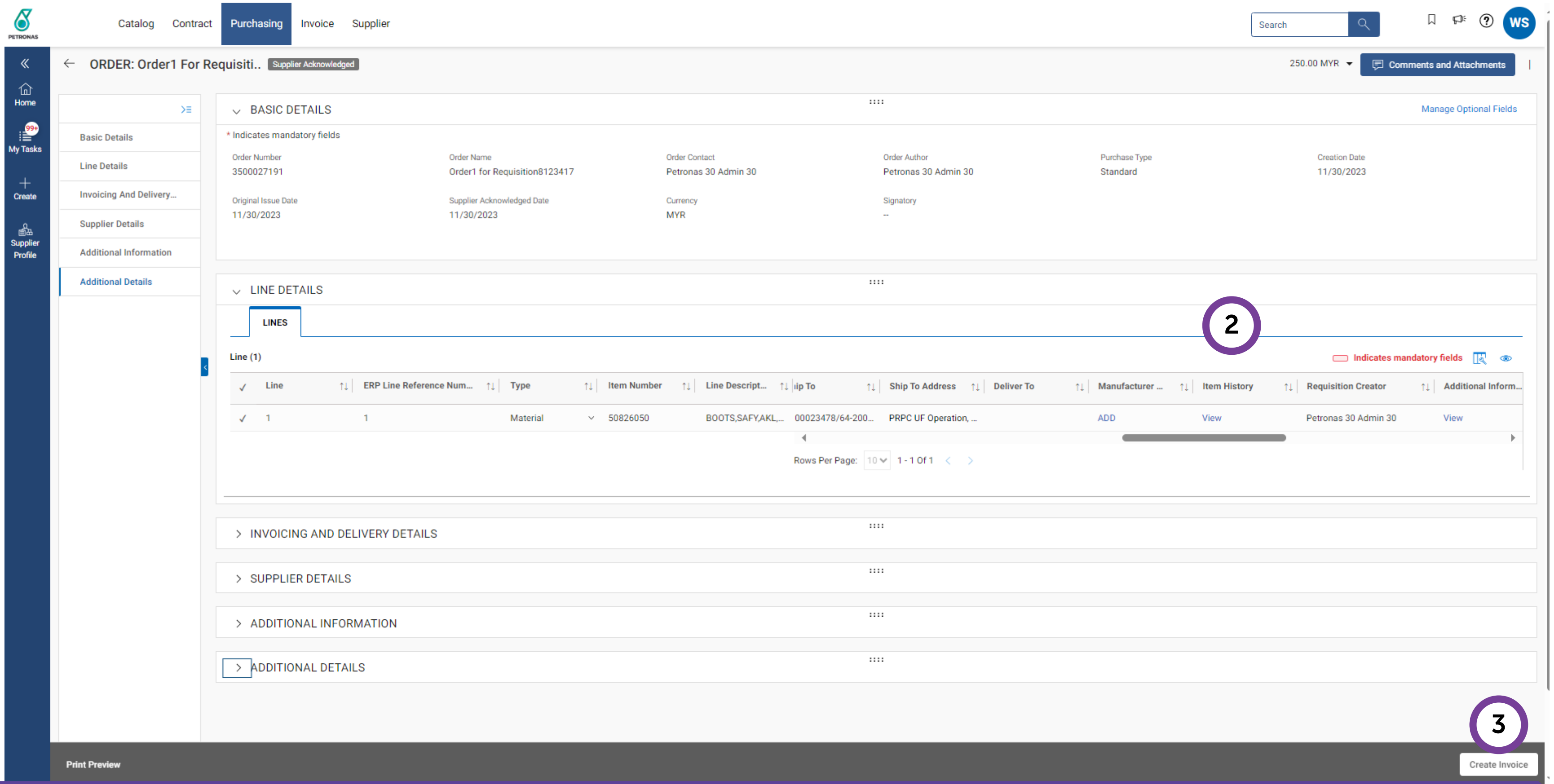
ORDER

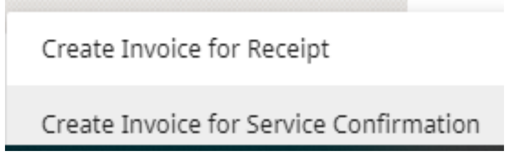
Supplier may create Payment Request once Receipt has been created for Material line-item purchases.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation) — 2 Payment Request (For Receipt)

From the PO screen, supplier can create a payment request based on total quantity accepted displayed in the item history.



2	The **Item History** shows the total quantity that has been received for this PO material line item.
3	In the PO document, supplier need to click on **Create Invoice** at the bottom right of the page. A pop up will appear with two options (Only applicable if PO has both Service and Material line items):  Create Invoice for Receipt Create Invoice for Service Confirmation If PO only has Service line items, only 'Create Invoice for Service Confirmation' will appear. Similarly, if PO only has Material line items, only 'Create Invoice for Receipt' will appear.

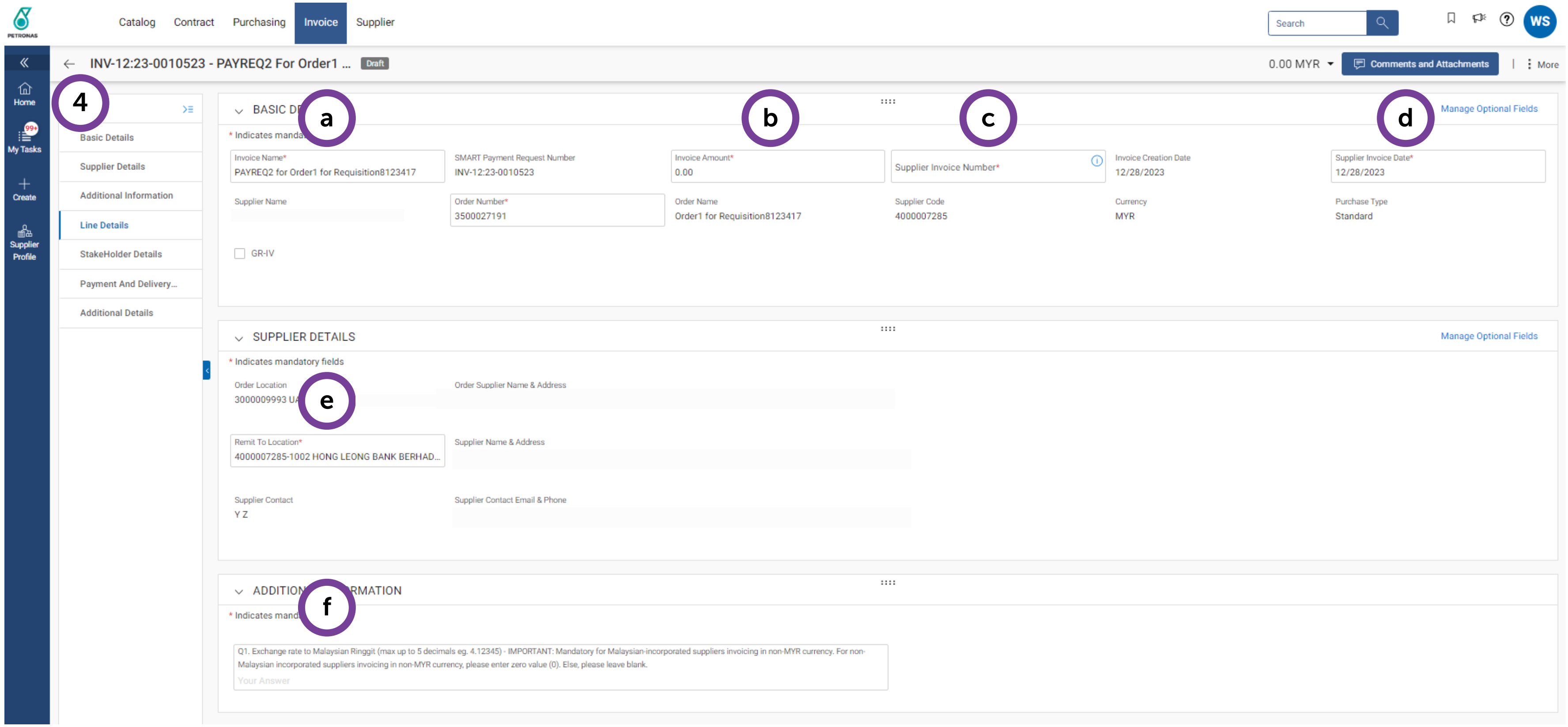
If there is only Material line item, clicking the Create Invoice will directly create a Payment Request.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier to fill up the information as required.



4	In 'Basic Details' fill in all required fields for the invoice.
a	Insert the Invoice Name.
b	Insert the Invoice Amount.
c	Insert the Supplier Invoice Number. The Supplier Invoice Number <u>must be unique</u> to each transaction. Due to a character limit within the system, please <u>ensure that the invoices you submit adhere to a MAXIMUM of sixteen (16) character invoice number per invoice</u>, including spaces and special characters.
d	Insert the Supplier Invoice Date.
e	Supplier may select preferred Remit To Location (Supplier Bank Account)
f	Insert the Exchange Rate if invoice document currency is non-MYR. Note: 1. For non-Malaysian incorporated suppliers invoicing in non-MYR currency, please enter zero value (0). Otherwise, please leave blank 2. Invoice submission in SMART will be auto-rejected if the exchange rate input by the Supplier is more than ± 20% compared to daily exchange rate.

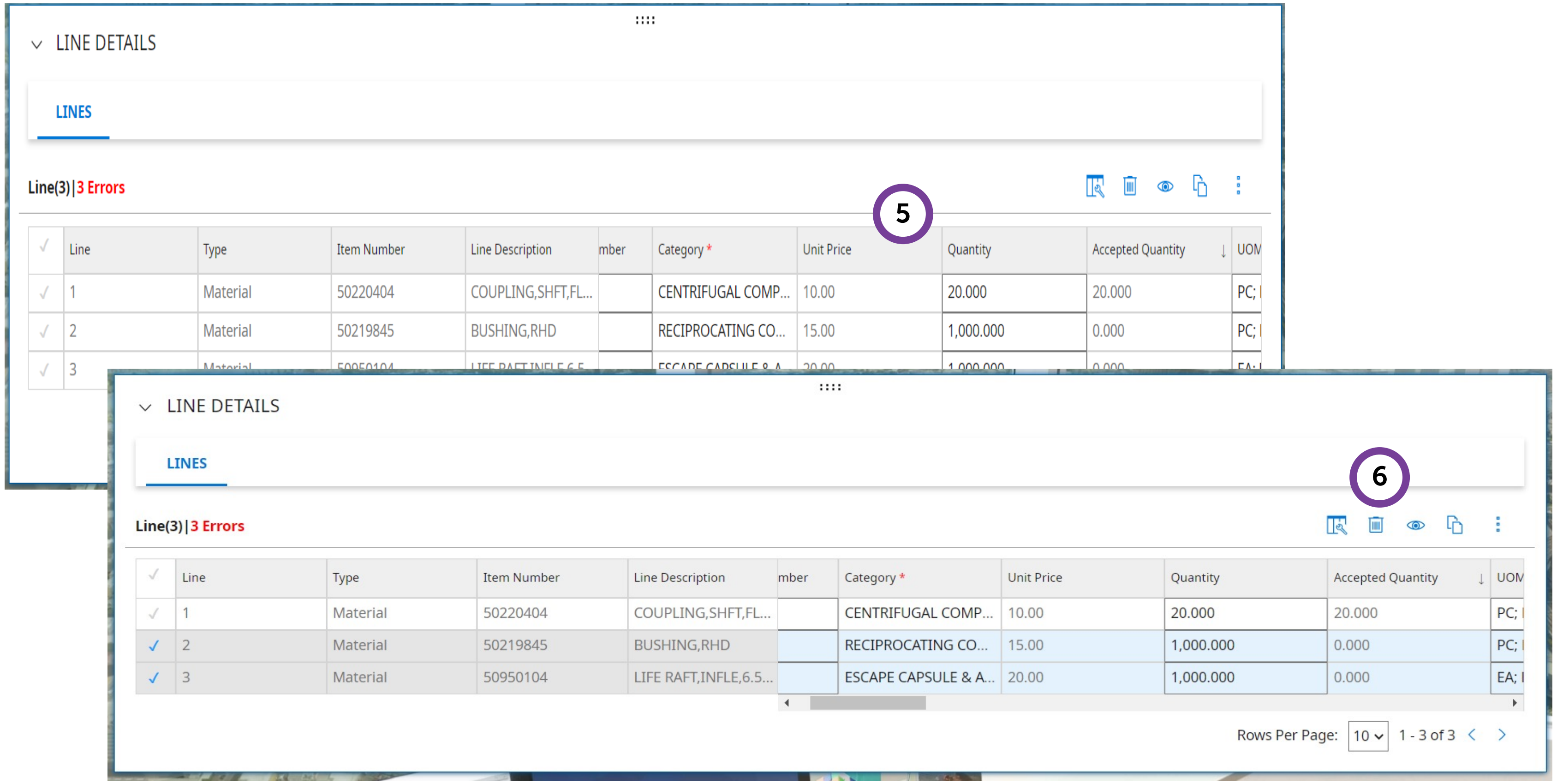
Remit to Location is Supplier Bank Account details that was key-in by supplier during Supplier Profile creation under Location Information section. Supplier is required to update Supplier Profile with relevant Remit to Location if the field is blank.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier is required to only claim the allowable quantity for the invoice based on the receipt. The system will reject any invoice that exceeded the total value of receipts.



5	Enter the quantity that is allowable in the system for the line item with Receipt. You can view the accepted quantity as a reference.
6	In the event of submitting invoice for selected line item, highlight the line item where there is no Receipt or invoice to be submitted. Click Delete icon to remove the highlighted line item with zero quantity.

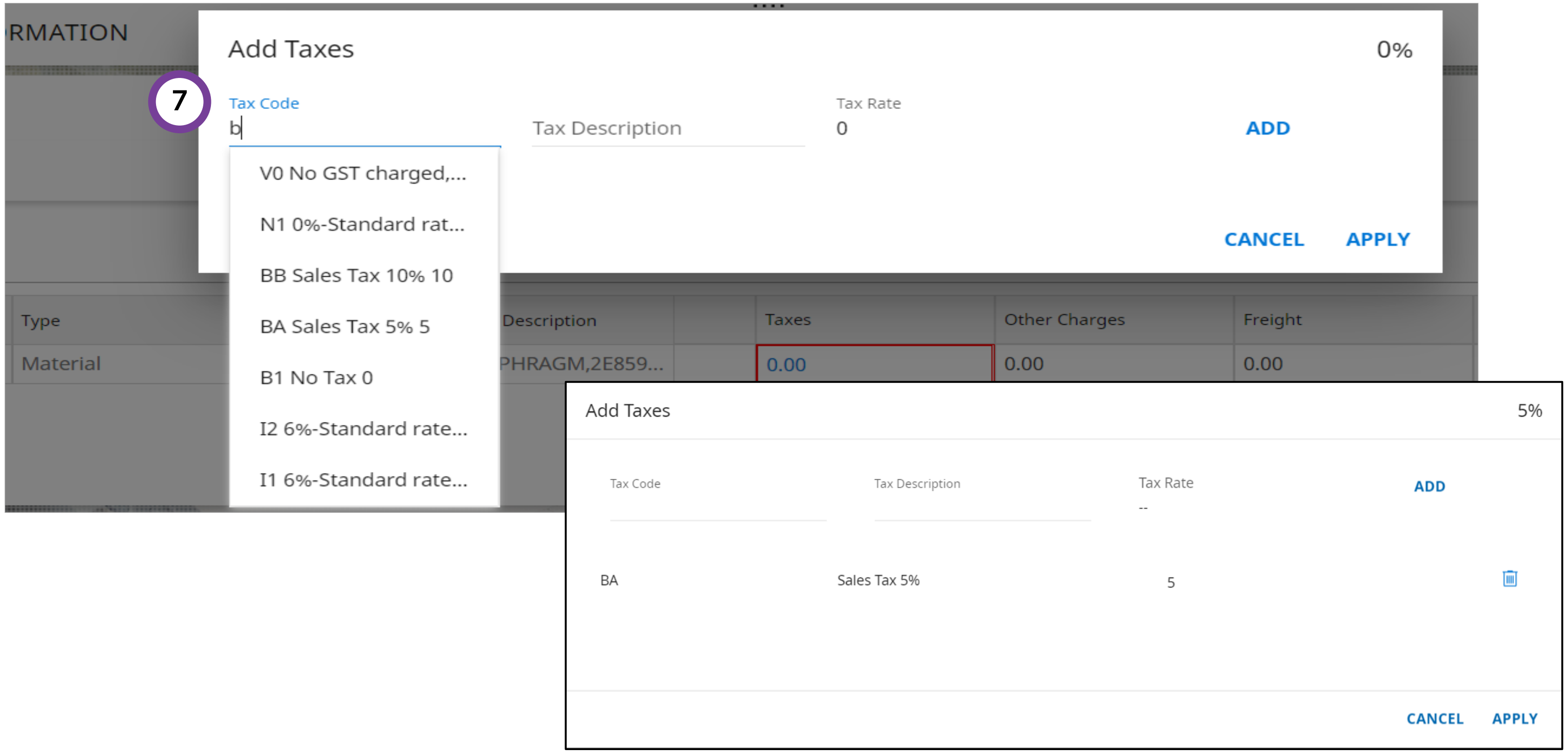
Supplier may create Payment Request once Receipt has been created for Material line-item purchases.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Tax categories will be available at each of the line item.



7 Under '**Line Details**' section, go to '**Taxes**' column and click '0.00' to Insert the Tax Code.

A popup will appear. Insert the applicable Tax Code as per the available options:

- Sales Tax P2P : 0% Default (B0)
- Sales Tax P2P: Non Taxable (B1)
- Sales Tax P2P: 5% (BA)
- Sales Tax P2P: 10% (BB)
- Service Tax P2P : 0% Default (K0)
- Service Tax P2P: 6% (KA)
- Service Tax P2P: 6% Imported Services (KI)
- Service Tax P2P: 8% Local supplier (KB)
- Service Tax P2P: 8% Imported Services (KJ)

Once selected, click '**Add**'.

Upon satisfied with the tax code selection, click on '**Apply**' Repeat the same step for each line item (if applicable).

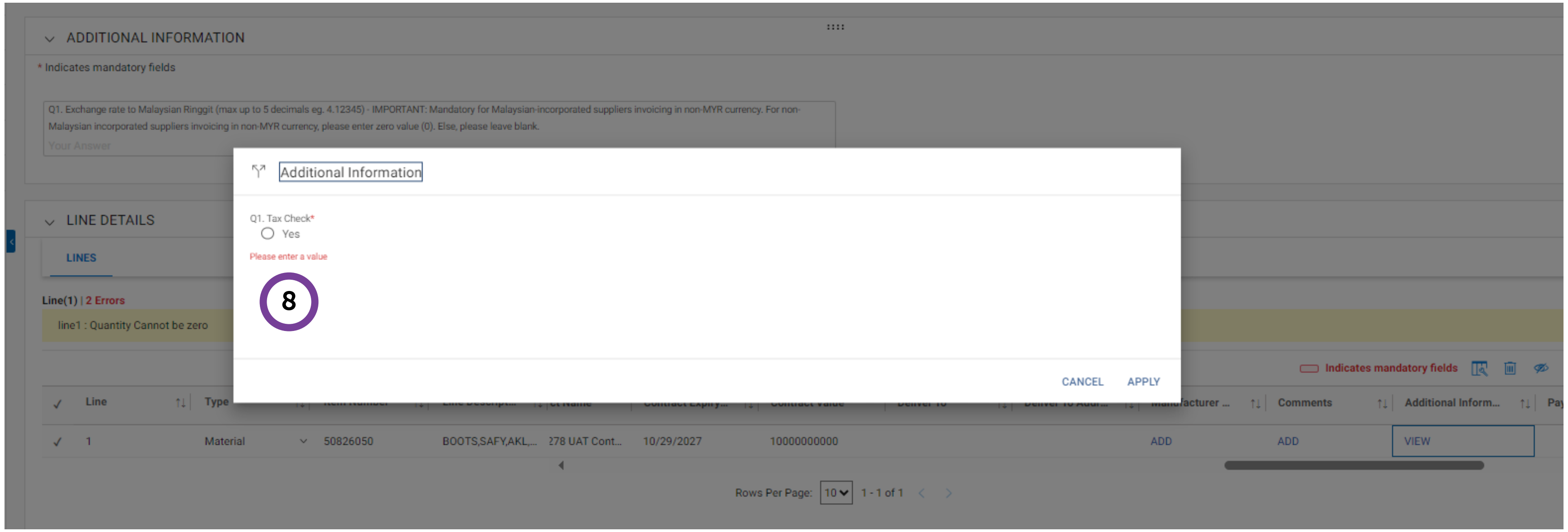
Only one tax code is allowed to be selected.

It is Supplier's responsibility to ensure that the right tax code and tax treatment is being selected and declared based on actual job completed.
Supplier can only charge for category of tax registered with Royal Malaysian Customs Department.
For full definition of the tax code, kindly refer to *here*.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)
2 Payment Request (For Receipt)

Tax check will be available at each of the line item in the 'Additional Information' field.



8 Within the same '**Line Details**' section, scroll to the right and click on '**View**' in **Additional Information** column.

Select **Yes** under Tax Check once satisfied with the tax code selection and click on Apply at the bottom right of the pop up.

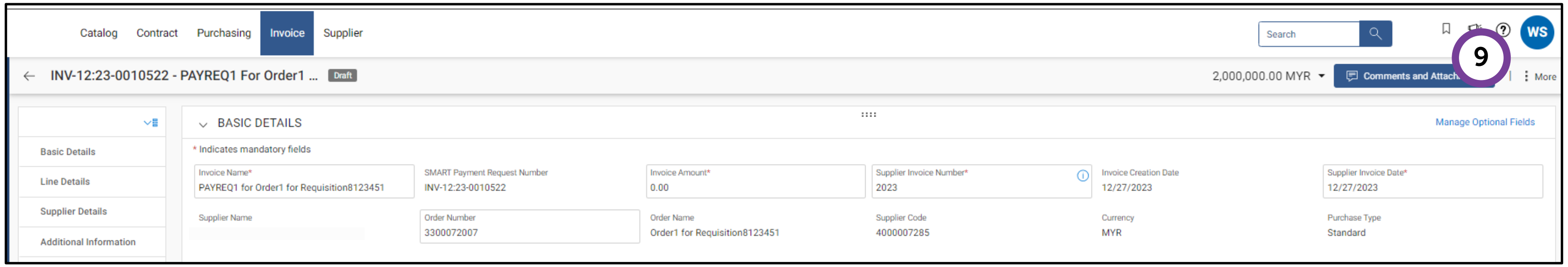
Repeat the same step for each line item.

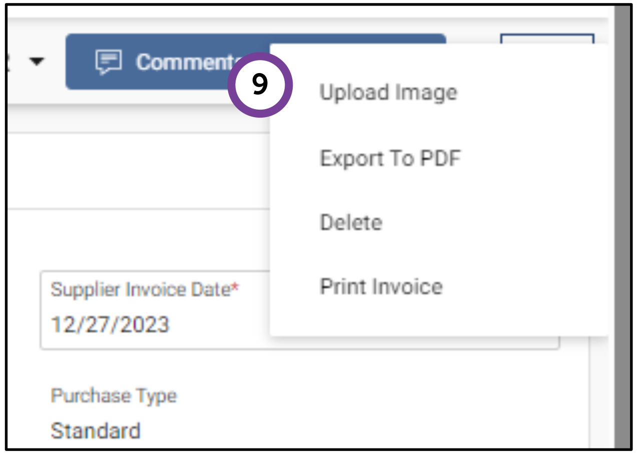
Please note that Tax Check is mandatory for all line items.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)
2 Payment Request (For Receipt)

Supplier is required to upload a scanned copy of the original invoice.





9	Click on '**More**' button at the top right corner of the screen and click on '**Upload Image**' to upload scanned copy of the Original Invoice document.

The scanned copy of the Original Invoice is a mandatory requirement by PETRONAS.

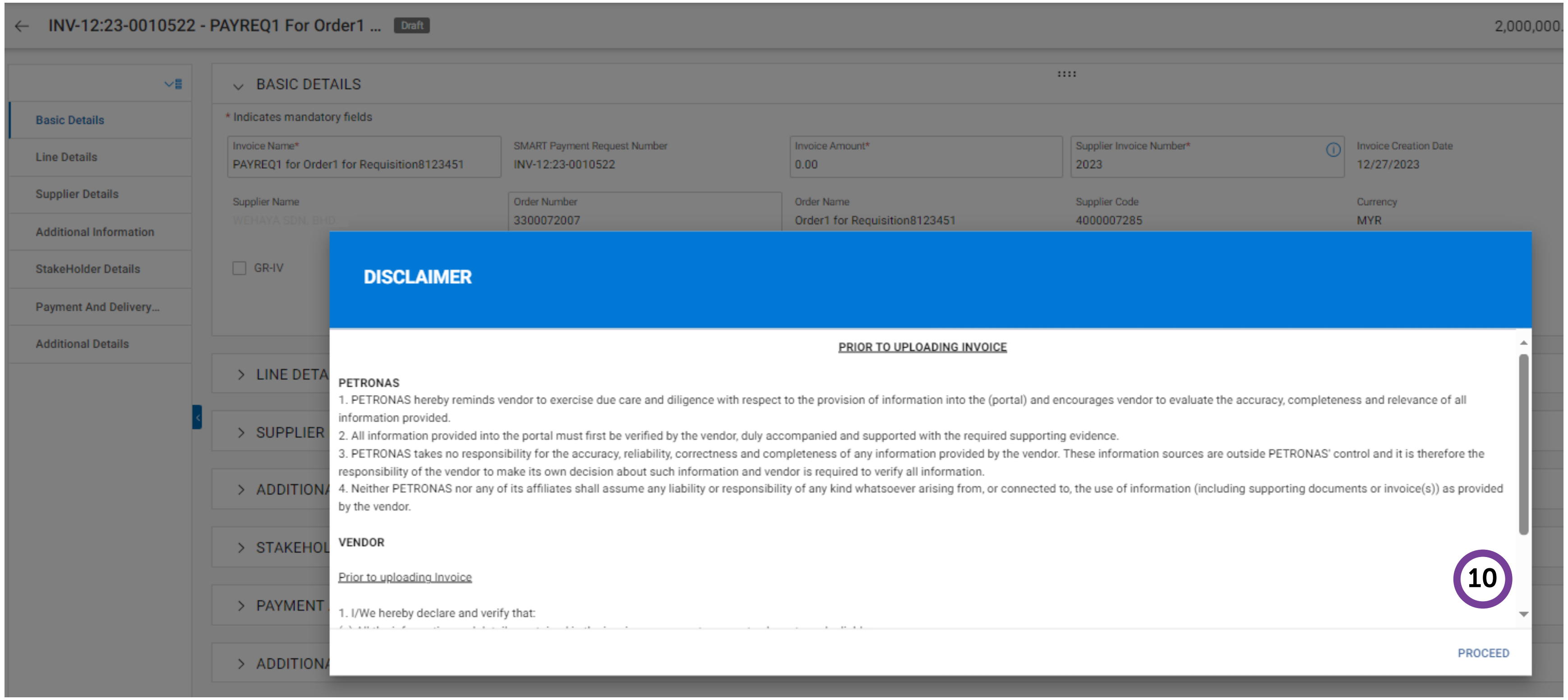
Kindly ensure the value of the Original Invoice uploaded is the same as per payment request created in GEP SMART

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

A disclaimer will be displayed prior to upload of scanned invoice and documents.



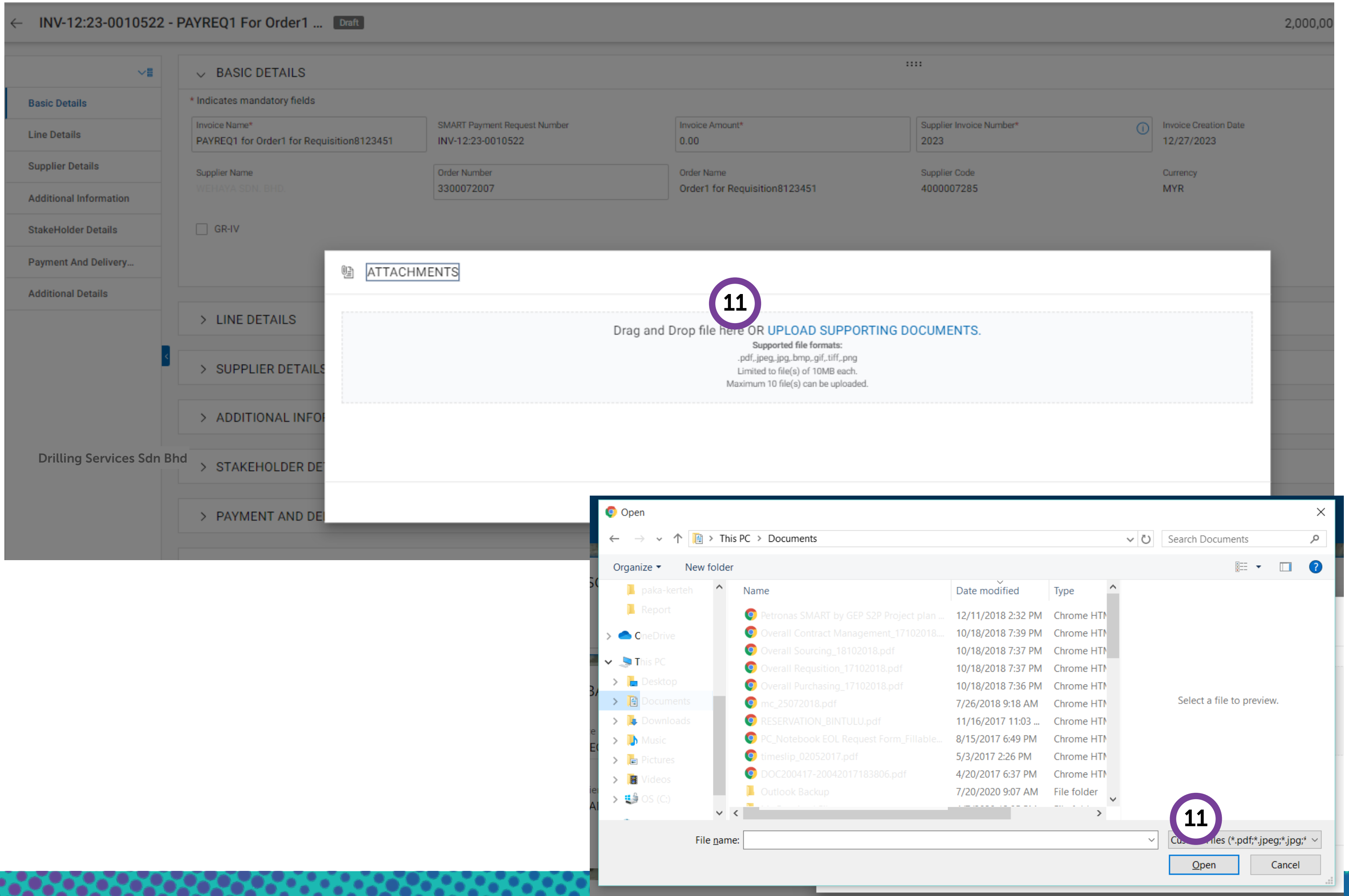
10	Click '**Proceed**' upon reviewing the disclaimers for uploading the scanned Invoice. It is supplier's responsibility to ensure that all the documents uploaded are correct and accurate based on actual job completion as per PO requirements.

Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier to upload the invoice document.



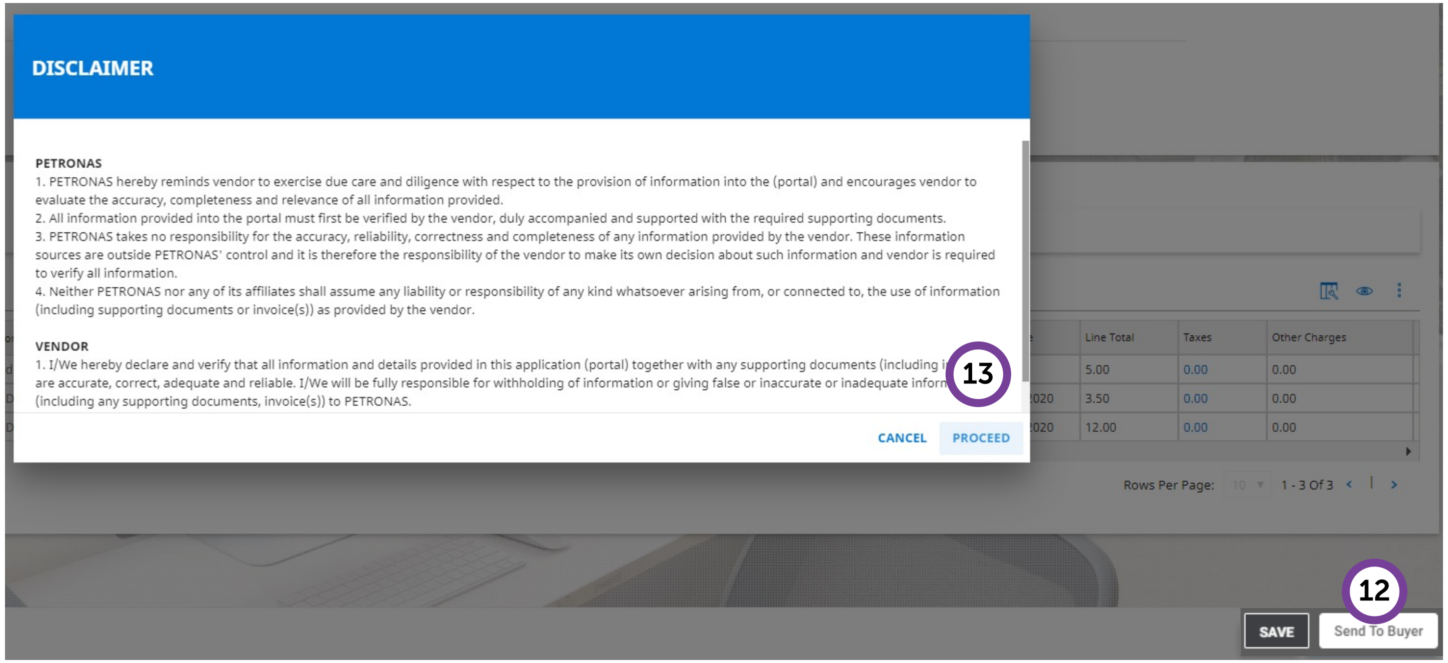
11	On the pop up, click '**Upload Documents**' and select the scanned invoice to be uploaded, then click Open.

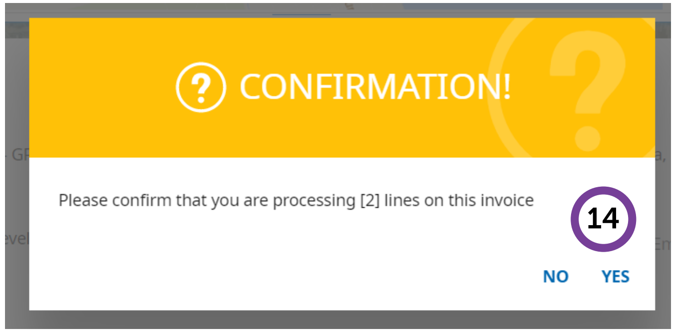
Create Payment Request (For Receipt)

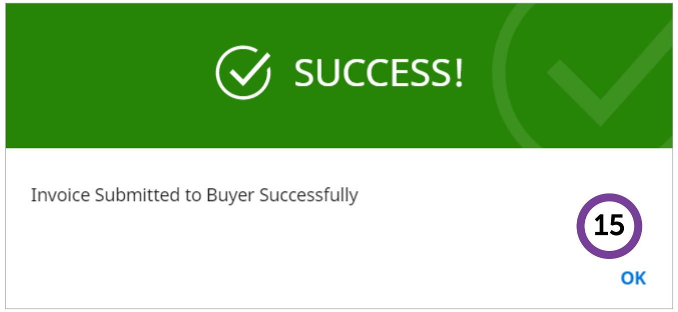
1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

Supplier to proceed with submission of Payment Request to PETRONAS. Another disclaimer for invoice submission will be displayed.







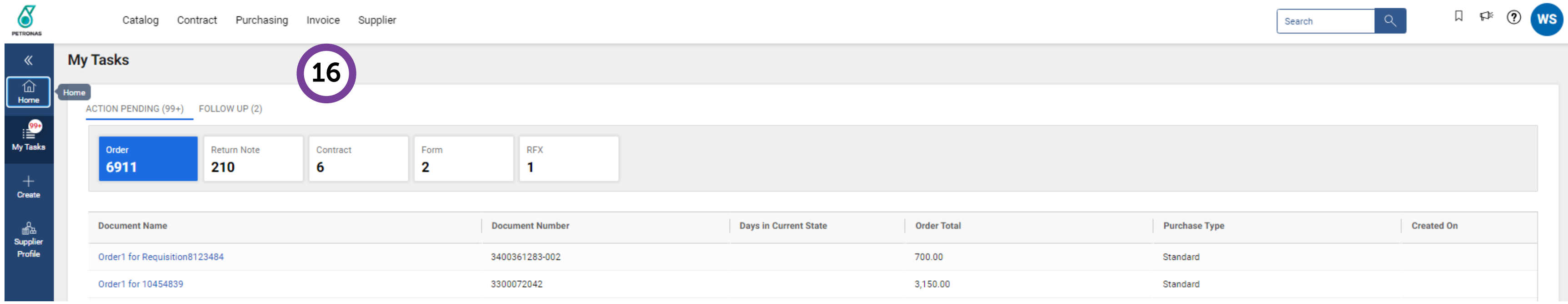
12	Click '**Send to Buyer**' once satisfied with all the details and attachments. Send To Buyer
13	Click '**Proceed**' upon reviewing the disclaimers for Invoice submission.
14	A confirmation pop up will appear to confirm the number of line items that will be processed in this invoice. Click '**Yes**' to proceed.
15	Success status will appear upon successful submission of Payment Request.

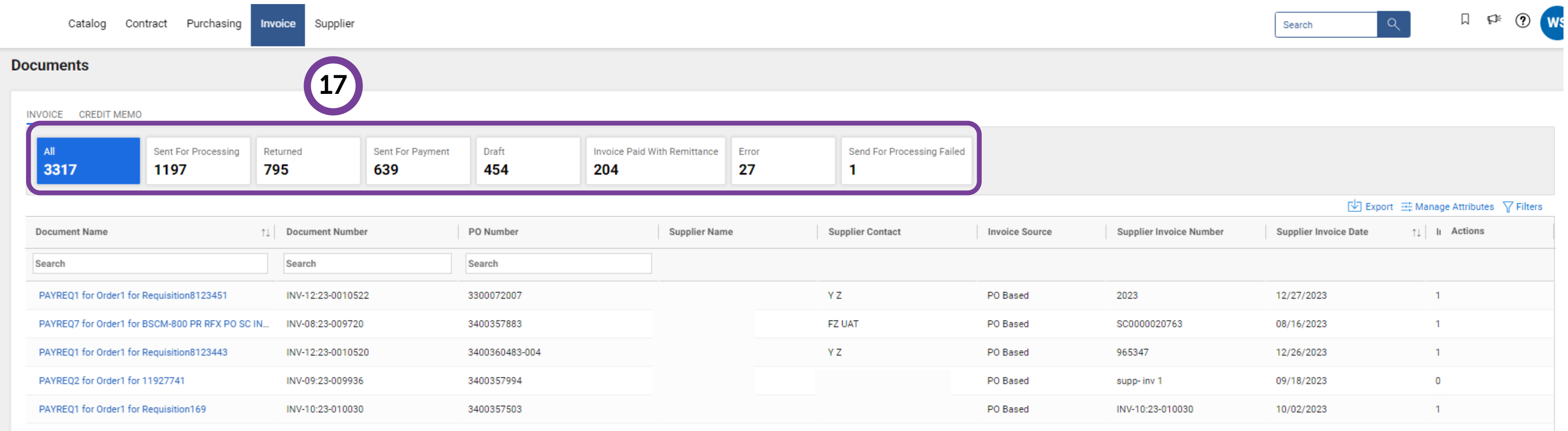
Create Payment Request (For Receipt)

1 Payment Request (For Service Confirm-ation)

2 Payment Request (For Receipt)

The status of the Payment Request will be displayed accordingly.





16	Supplier will be able to view the status of the Payment Request from '**Invoice**' section at homepage.
17	Status of Payment Request will be displayed accordingly.

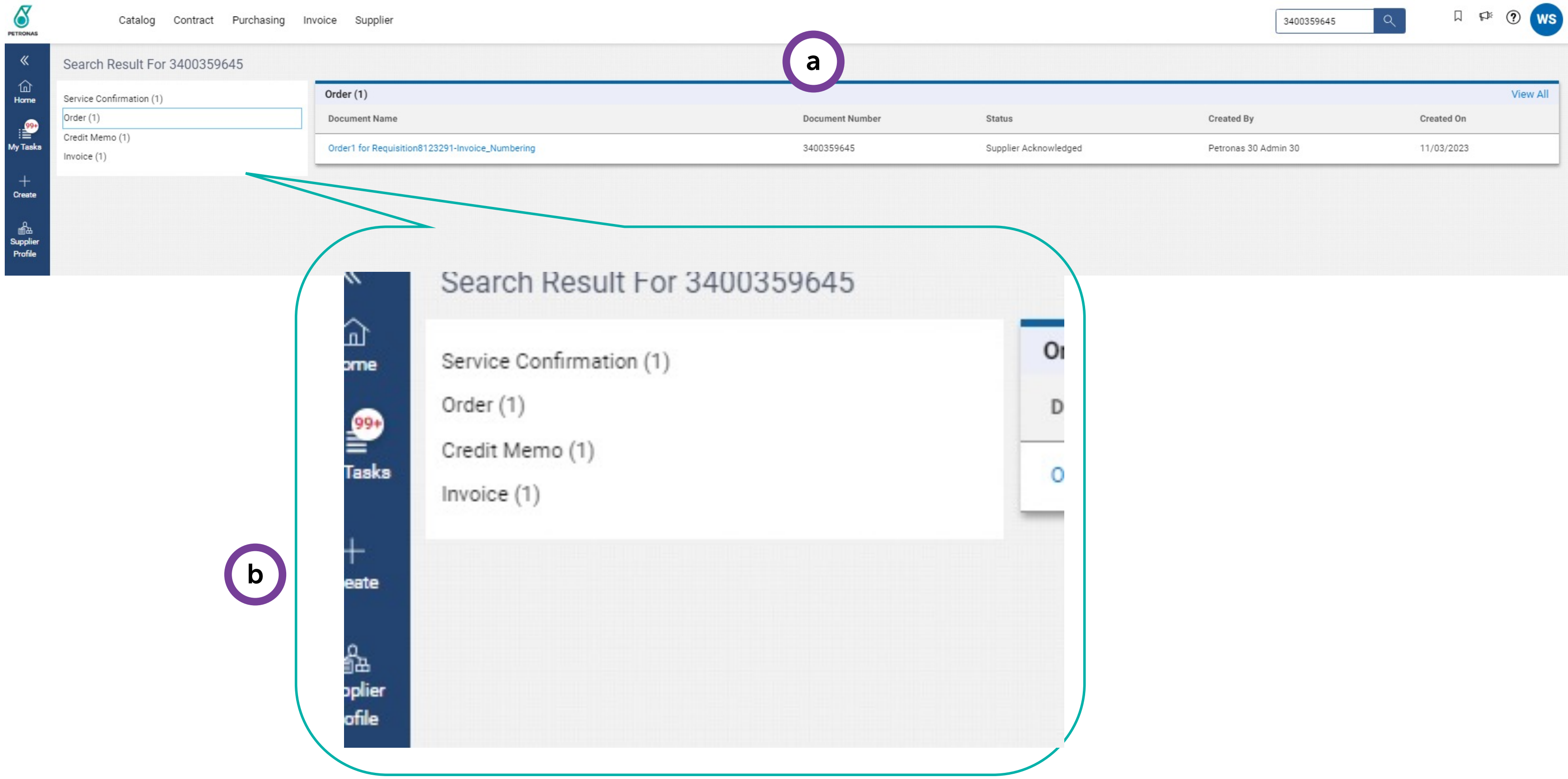
Definition of Invoice Status

The status of the Payment Request will be displayed accordingly.

Invoice Status	Definition
Sent For Processing	Invoice in que for system validation.
Sending In Progress	Invoice system validation in progress.
Sent For Payment	Invoice accepted by Finance and pending payment remittance according to payment term.
Invoice Paid With Remittance	Invoice paid with remittance confirmed to supplier's bank account.
Returned	Invoice rejected by Finance Administrator. Supplier to refer document comment for reason of rejection.
Internally Cancelled	Invoice cancellation initiated by supplier.
Error	Invoice document mandatory field not matched supplier profile e.g., Remit to Location.

Create Payment Request (For Receipt)

Supplier will be able to see all subsequent related documents created for PO document by selecting 'All' as shown below.



a	When entering PO number and selecting 'All' document types, system will display list of subsequent related documents created for this PO number. If there are more than one (1) invoice submitted, each Invoice document will show details of invoiced quantity and amount. Note: Total value of SC/Receipt and Invoice must be equal to total value of PO.
b	Supplier can further filter and click on the relevant related documents.

Troubleshooting Invoice Submission Error or Rejection

Supplier could try the below steps in the event invoice could not be submitted or if invoice is rejected.

If you face errors in submitting your invoice:

- Make sure that you **fill in the mandatory fields** especially Line Details section.
- Do **fill in Tax Code in Tax field** (refer to *here* for list of tax codes and descriptions; please note that the tax codes are subject to changes).
- **Tick Tax Check field** under Additional Info column of the Line Details section.
- Ensure that the PO number and Invoice number for **scanned invoice follows SMART PO and Invoice number.**
- Alternatively, **create a new invoice** (Go back to the PO and click on More Actions, click on Create Invoice).

If your invoice was rejected:

- Ensure that an **SC has been created for the PO** prior to creating the invoice.
- **SC quantity/ amount** must be within PO quantity/ amount.
- **Total invoice quantity/ effort/ unit price** must be within the accepted quantity/ effort/ amount.
- **Fill in Remit to Location** information and ensure scanned invoice bank account number same as system bank account number.

Definition of Tax Code

Supplier to insert the applicable Tax Code for invoicing as per the available options below.

Tax Code	Listing Type	SST Percentage	Definition
B0	Purchase	0%	Acquisition of materials/products that are not subject to SST.
B1		Non-taxable	Acquisition of non-taxable materials/products from local supplier (non-registered vendor).
BA		5%	Acquisition from sales tax registrant (5% sales tax).
BB		10%	Acquisition from sales tax registrant (10% sales tax).
K0		0%	Acquisition of services that is not subject to SST.
KA		6%	Acquisition of taxable services from registered local service provider with 6% service tax (Service tax registrant in Malaysia).
KI		6%	Acquisition of imported taxable services from foreign vendor (non-registered) with 6% service tax.
KB		8%	Acquisition of taxable services from registered local service provider with 8% service tax (Service tax registrant in Malaysia).
KJ		8%	Acquisition of imported taxable services from foreign vendor (non-registered) with 8% service tax.

Create Credit Memo

Credit Memo can be created from an invoice.

Learning Objectives

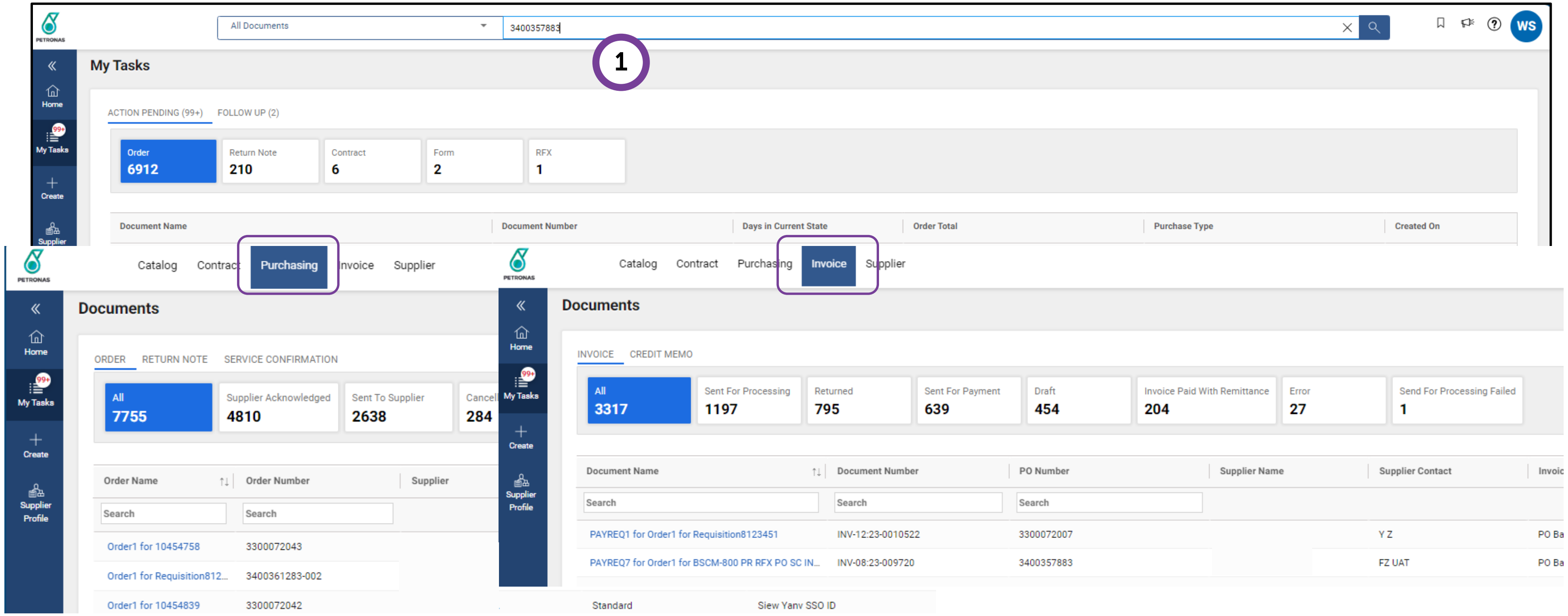
Suppliers will be able to create Credit Memo in GEP SMART

1

Create Credit Memo

Create Credit Memo

Suppliers can create Credit Memo from Invoice document, which can be found by searching the PO number.

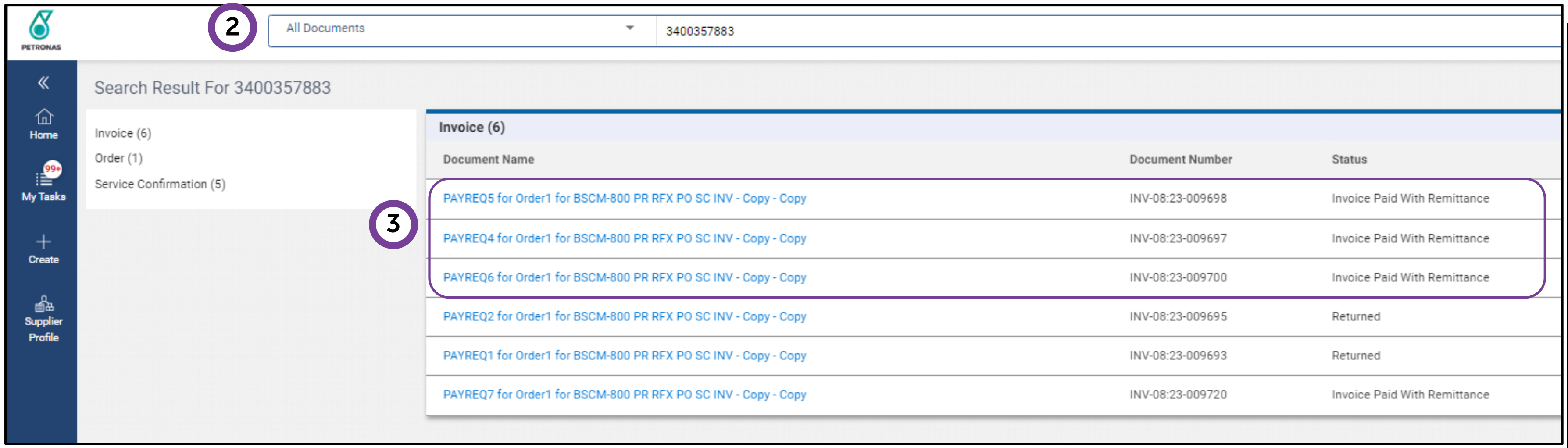


1	Search for the PO number to display subsequent related documents including Invoice documents from the Search field. Alternatively, Supplier may also search the PO number from "**Purchasing**" section at the homepage if the exact PO number is not known.

Supplier can also go directly to '**Invoice**' section from homepage to search if the SMART Invoice number is known.

Create Credit Memo

Credit Memo creation is only permitted for Invoice document with certain statuses.



2	When entering PO number and selecting **"All" document types,** system will display list of subsequent related documents created for this PO number.
3	**Select Invoice with permitted status** to proceed with Credit Memo creation. Permitted Status: - Sent for Processing - Sent for Payment - Invoice Paid with Remittance

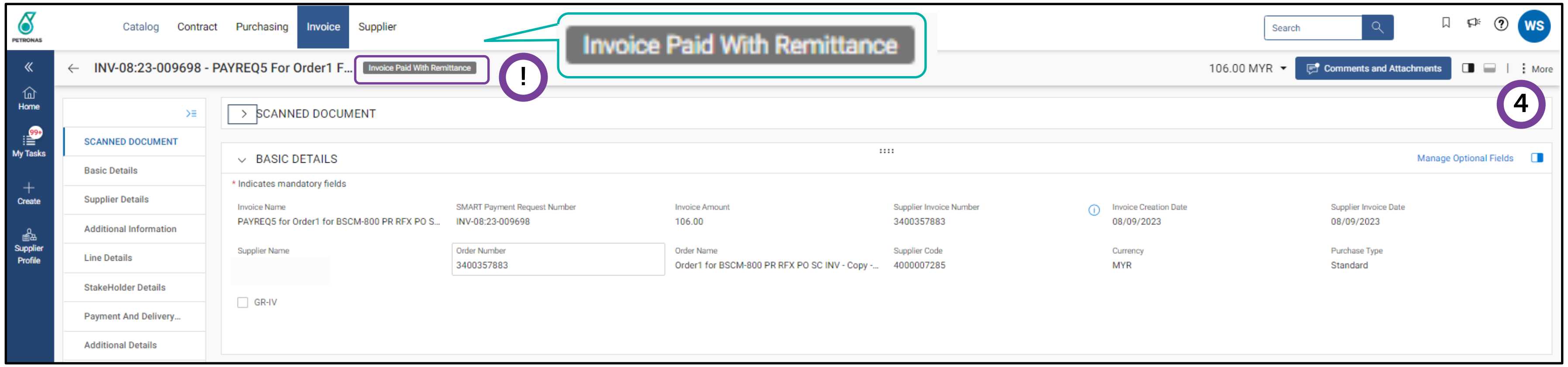
Any submission for Invoice with "Draft" status is not permitted.

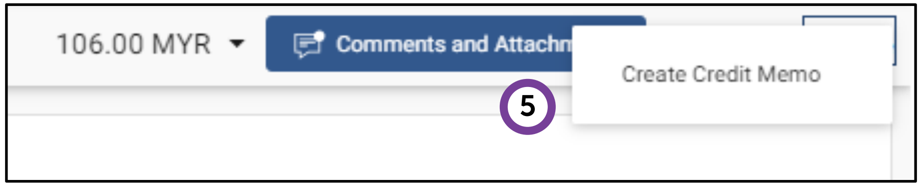
Create Credit Memo

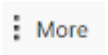
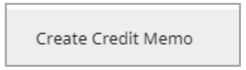
1

Create Credit Memo

Supplier to ensure the Invoice document with status 'Sent For Processing', 'Sent For Payment' or Invoice Paid With Remittance' prior to creating Credit Memo.



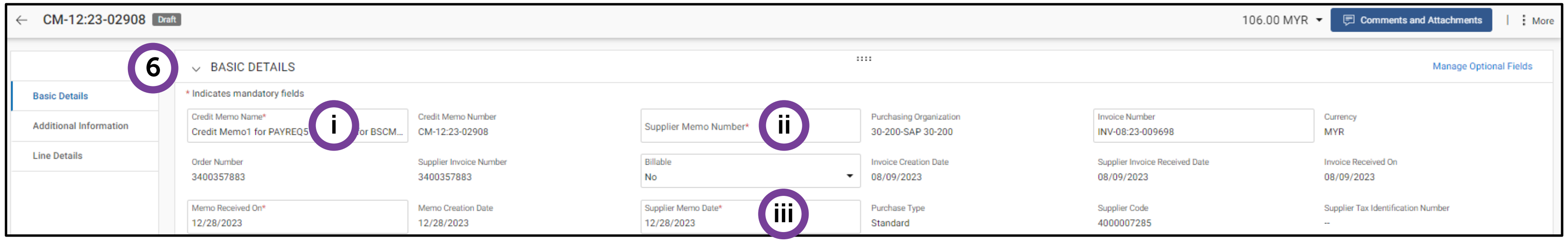


!	Supplier to **ensure the invoice status** must be '**Sent For Processing**', '**Sent For Payment**' or '**Invoice Paid With Remittance**' only.
4	Supplier to click on the **'More' button.** 
5	Select option **Create Credit Memo.** 

Create Credit Memo

1
Create Credit Memo

Supplier to insert the required details in the Credit Memo.

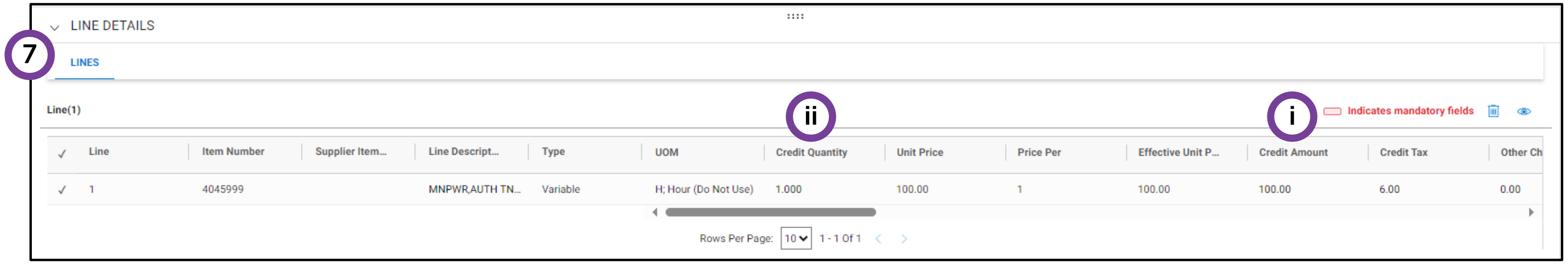


6	Fill in **Basic Details** section.
i	Insert the **Credit Memo Name.**
ii	Insert the **Supplier Memo Number.** **Supplier Memo Number <u>must be unique</u>** to each transaction.
iii	Insert the **Supplier Memo Date.**

Create Credit Memo

1
Create Credit Memo

2 types of Credit Memo:		
1	**Credit Memo (Amount-based)**	Supplier is required to update credit memo amount only. This credit amount must not exceed the invoice amount.
2	**Credit Memo (Quantity-based)**	Supplier is required to update credit memo quantity only. This credit quantity must not exceed the invoice quantity.



LINE DETAILS

7

LINES

Line(1)

ii

i

Indicates mandatory fields

✓	Line	Item Number	Supplier Item...	Line Descript...	Type	UOM	Credit Quantity	Unit Price	Price Per	Effective Unit P...	Credit Amount	Credit Tax	Other Ch
✓	1	4045999		MNPWR,AUTH TN...	Variable	H; Hour (Do Not Use)	1.000	100.00	1	100.00	100.00	6.00	0.00

Rows Per Page: 10 1 - 1 Of 1

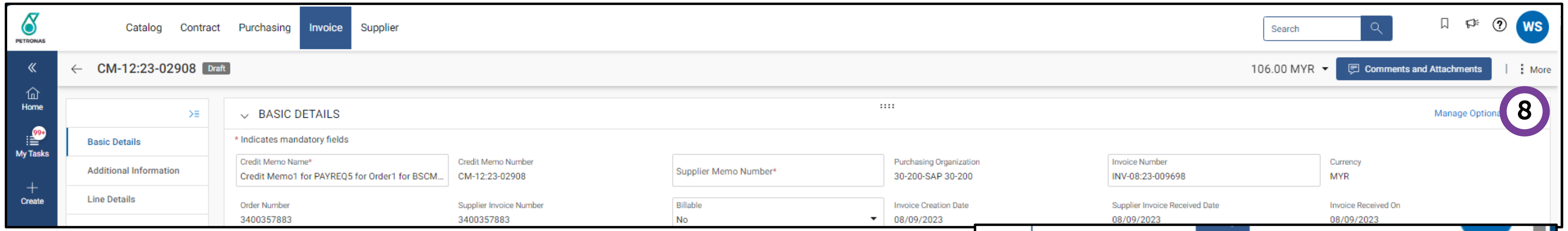
7	Fill in the **Line Details** section.
i	**For Amount-based:** Insert the amount under **'Credit Amount'.** System will give error message if supplier enter higher amount than invoice amount.
Ii	**For Quantity-based:** Insert the correct quantity under **'Credit Quantity'.** System will give error message if supplier insert higher amount than invoice quantity.

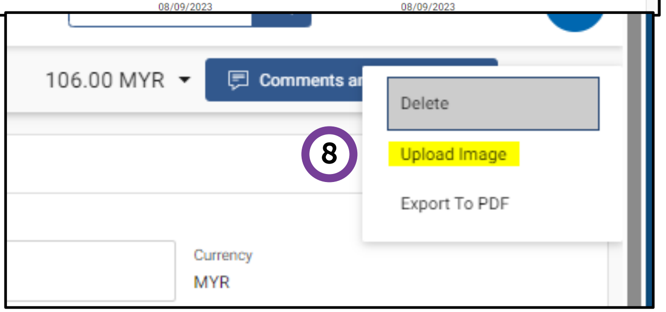
- Credit Memo creation is only permitted for Invoice document with status "Sent For Processing", "Sent For Payment" or "Invoice Paid With Remittance" only. Any submission for Invoice with "Draft" status is not permitted.
- For Timewrite suppliers, you are required to submit Credit Memo (Amount-based) only upon receiving email notification.

Create Credit Memo

1
Create Credit Memo

Supplier to upload the scanned copy of the Original Credit Memo for verification.



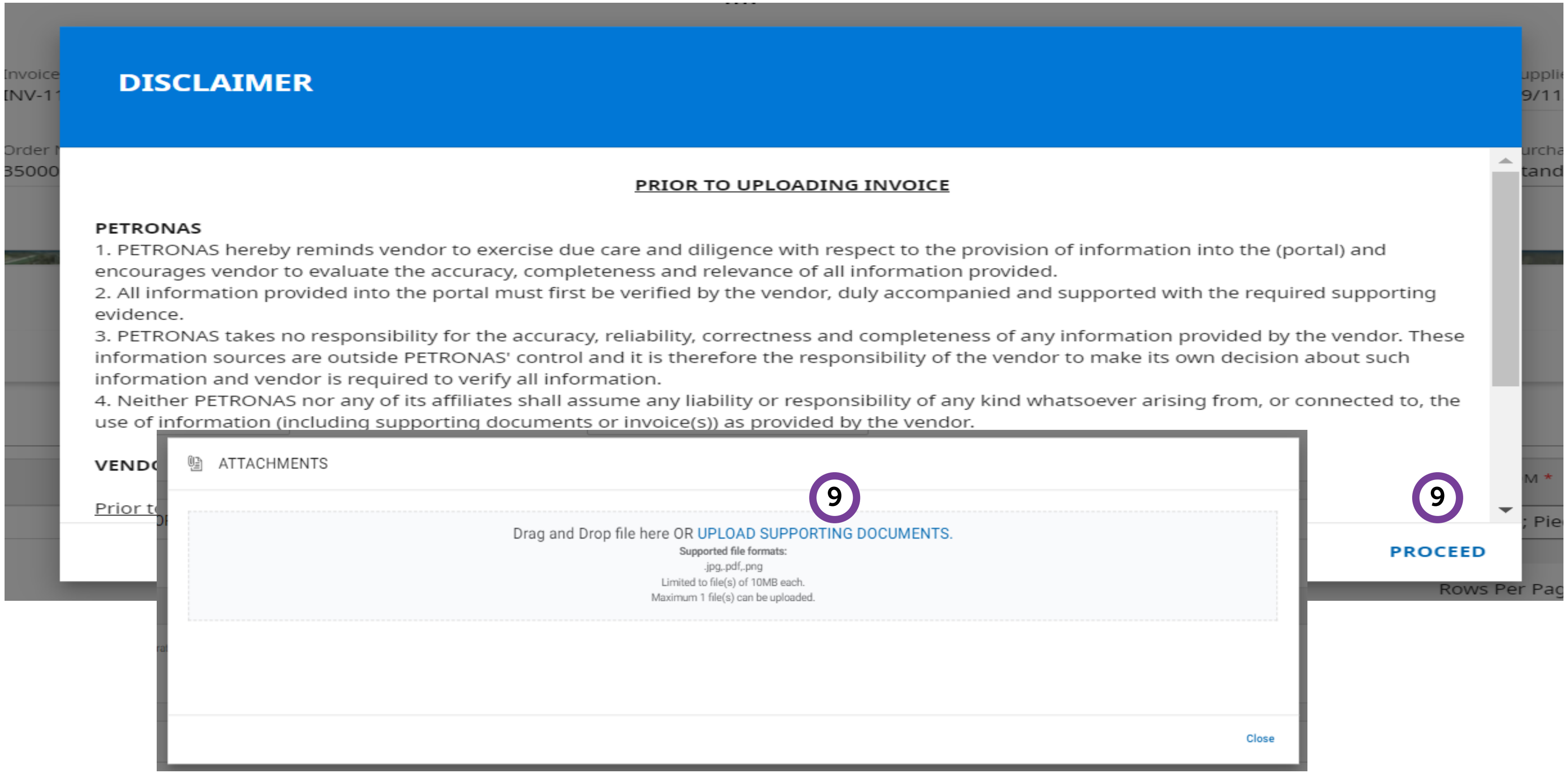


8	Click the '**More**' button and select **Upload Image** to upload the Original Credit Memo document. ⋮ More If Credit Memo is cancelled, Select **Delete** to cancel on the draft Credit Memo.

The scanned copy of the Original Credit Memo is a mandatory requirement by PETRONAS. Kindly ensure the value of the Original Credit Memo uploaded is the same as per credit memo document created in SMART.

Create Credit Memo

Disclaimer will be displayed upon upload of scanned Credit Memo documents.

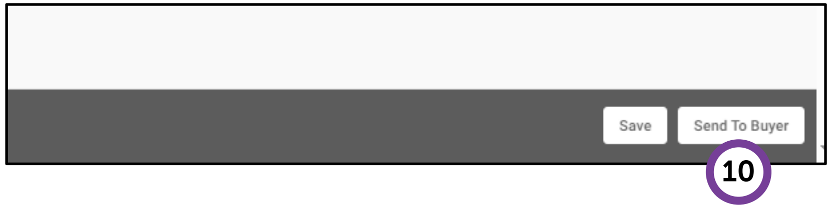


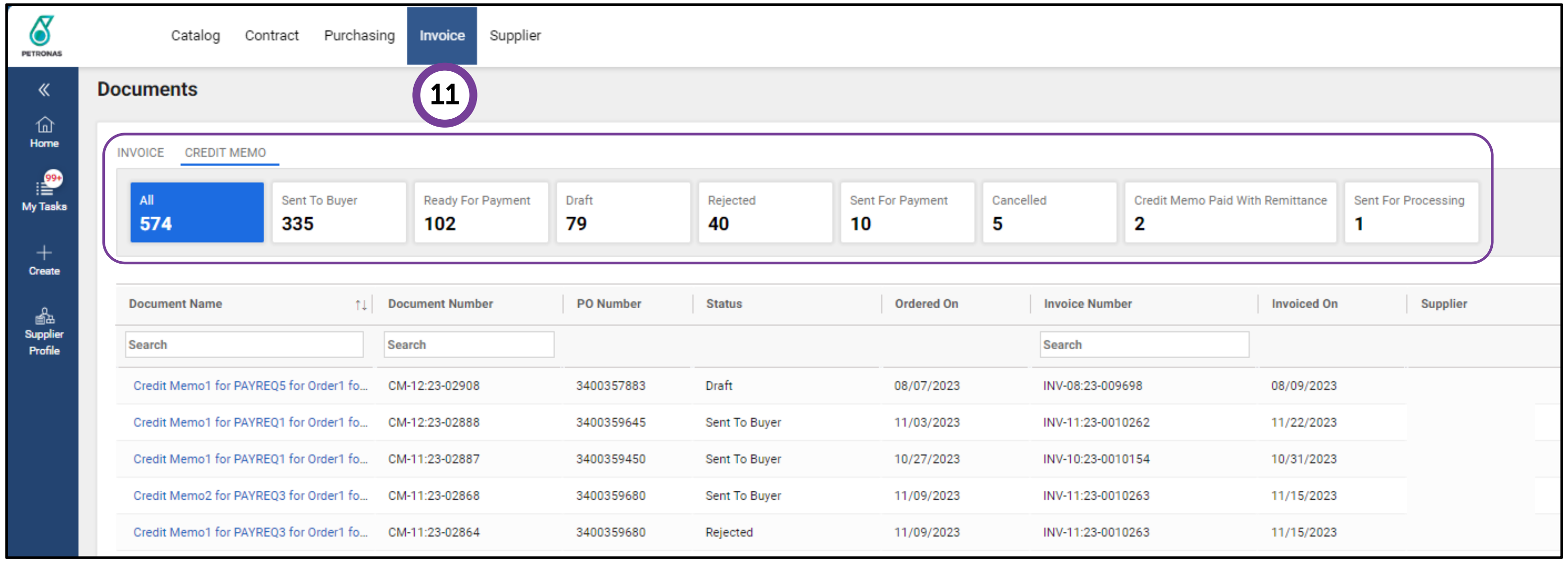
9	Click **"Proceed"** upon reviewing the disclaimers for uploading the scanned Credit Memo. A pop up will appear and click on **Upload Supporting Documents** to start uploading documents.

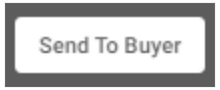
It is supplier's responsibility to ensure that all the document attached is correct and accurate based on actual job completion as per PO requirements and deliverables.

Create Credit Memo

Supplier to proceed with submission of Credit Memo to PETRONAS.





10	Click **"Send to Buyer"** at the bottom of the page once satisfied with all the details and attachments.  Credit Memo status will change from "Draft" to "Sent to Buyer".
11	From homepage, under '**Invoice**' section, supplier can see the status for all Credit Memo available under '**Credit Memo**' tab.

The status of the Credit Memo will be displayed upon submitting the Credit Memo to buyer.

GEP SMART
NextGen

Supplier User Guide

Support Contact

Support Contact

Should you require any support, please reach out to us via the following channels:

PETRONAS Contact Centre

supplier.servicedesk@petronas.com.my

1-800-88-0011


Thank You