CBU Smart by GEP Deployment

supplier enablement overview

CBU Smart by GEP Deployment – Supplier Enablement
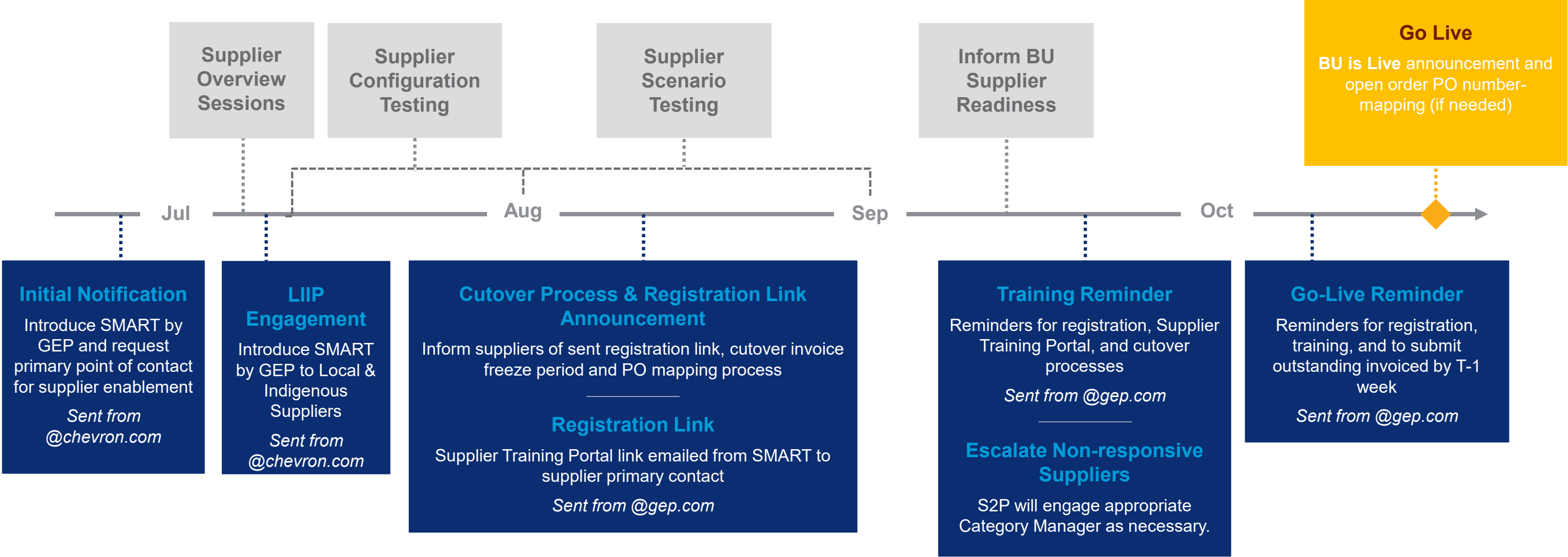## What is changing for suppliers?

	FROM	TO
Sourcing	Requests for proposals and quotations are generally manual and the process can vary between business unit.	RFQs will happen electronically. From invitation through submittal, both Chevron and suppliers will collaborate through the tool. You will have visibility into the response timeline and will be notified electronically once the evaluation period has closed.
Contracting	Contract negotiations, execution and signature occur offline and multiple systems are used to collaborate on catalogs.	Collaboration on terms and conditions, pricing and amendments will happen within SMART's contracting workspace. Chevron will negotiate with suppliers throughout the contracting process until both parties reach an agreement and the contract is signed via electronic signature through direct integration with DocuSign.
Orders	Order delivery method can vary between business unit and order acknowledgement is offline.	Order processing is simplified with SMART, providing a consistent method of delivery for purchase orders. Offline acknowledgment of orders is eliminated as all orders, regardless of material or service, will now be acknowledged by suppliers through their web portal.
Service Confirmation	Suppliers contact Chevron end users for signed time sheets or manually upload invoice attachments in Ariba.	With SMART, service confirmations are routed directly to Chevron end users for electronic approval as confirmation of work performed. Once service confirmations are approved, suppliers can submit the invoice.
Invoicing	Invoicing via PIDX, ERS and in some locations, suppliers submit invoices via mail or fax.	Although there is no change for automated PIDX or ERS suppliers, mail or fax invoices will no longer be accepted by Chevron. Manual invoices must be submitted through SMART.
Credits	Credit memos / returns are generally manual and the process can vary between business unit.	Upon a need for a credit memo, suppliers will create the credit through their portal. Once submitted, it will automatically route for approval.

CBU Smart by GEP Deployment – Supplier Enablement
Suppliers will be sent multiple registration and training reminder communications

Supplier Overview Sessions

Supplier Configuration Testing

Supplier Scenario Testing

Inform BU Supplier Readiness

Go Live

BU is Live announcement and open order PO number-mapping (if needed)

Jul | Aug | Sep | Oct

Initial Notification

Introduce SMART by GEP and request primary point of contact for supplier enablement

Sent from @chevron.com

LIIP Engagement

Introduce SMART by GEP to Local & Indigenous Suppliers

Sent from @chevron.com

Cutover Process & Registration Link Announcement

Inform suppliers of sent registration link, cutover invoice freeze period and PO mapping process

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Registration Link

Supplier Training Portal link emailed from SMART to supplier primary contact

Sent from @gep.com

Training Reminder

Reminders for registration, Supplier Training Portal, and cutover processes

Sent from @gep.com

Escalate Non-responsive Suppliers

S2P will engage appropriate Category Manager as necessary.

Go-Live Reminder

Reminders for registration, training, and to submit outstanding invoiced by T-1 week

Sent from @gep.com

Suppliers must register and attend training to be ready to transact with CBU in SMART on October 26, 2020

1 **Register in SMART**

- Supplier registration emails were sent to all suppliers in August.
- If your company has not received a registration email, please contact supplier_enablement@chevron.com or your respective CBU Category Specialist.
- All suppliers must register in SMART in order to transact with Chevron.

2 **Update your company's profile and contacts**

- Validate your company's profile information, including primary contact information. Note, the Primary Contact is used for all order-related notifications, unless the Chevron buyer selects an alternate recipient in SMART. Chevron recommends using a shared or group mailbox for the Primary Contact.
- Add any required secondary contacts to the profile.
- For more information on registration and managing your company's profile, visit the Help Center within the SMART portal.

3 **Attend supplier training sessions**

- Training sessions are held weekly and cover the registration process, contracting and pricebook management, and order through payment processes.
- PIDX suppliers must also attend PIDX-specific training. PIDX training details were sent via email to impacted suppliers.
- Training attendance is *required* for all suppliers prior to go-live. Please ensure your company is familiar with SMART's functionalities and workflows.

4 **Prepare for Ariba / SMART system cutover**

Ariba Cutover Dates:

- Non-PIDX Suppliers: **Manual invoice submission in Ariba will be unavailable starting Friday, October 16 at 6pm MDT. All outstanding invoices against open Ariba orders should be submitted before October 16.** Transactions submitted to CBU in Ariba after this date will not be processed and must be resubmitted with new migrated SMART order number on or after Monday, October 26.
- PIDX-Suppliers: **XML invoices can be submitted against open orders in Ariba until Thursday, October 22 at 4pm MDT**. Any XML transactions submitted to CBU after Thursday, October 22 will NOT be processed and must be resubmitted to SMART with the new migrated order number on or after Monday, October 26.

Managing Open Orders at Go-Live

- Long term Ariba material orders with promised delivery dates 90 days after October 26 (January 24, 2021 and beyond) will be migrated to SMART. A new SMART order number will be sent via email between October 23 and October 26.
- Short term Ariba material orders with promised delivery dates less than 90 days after October 26 (prior to January 24, 2021) will remain in Ariba. The order number will not change and will not migrate to SMART. They will be received and processed by Chevron in the old system.
- Your order processor will also receive a closure notification for Ariba service orders and a new SMART order number will be sent via email between October 23 and October 26.

Supplier training sessions are available weekly and are required for suppliers to be able to transact in SMART

Day & Time	Intended Audience	Training Topics	WebEx Details
Tuesdays **10 a.m. – 11 a.m. MDT /** **11 a.m. – 12 p.m. CDT**	Order Processors Sales Representatives	• Registration • Profile management • Order review and acknowledgement • Request a change on an order • Advanced Shipping Notice (ASN) creation and cancellation	www.webex.com or Toll Free: +1 (855) 429-4299 Meeting Number: 264 740 390 Meeting Password: 47747633
Wednesdays **10 a.m. – 11 a.m. MDT /** **11 a.m. – 12 p.m. CDT**	Contract Managers Sales Representatives	• Contract collaboration • Pricebook (catalog) management	www.webex.com or Toll Free: +1 (855) 429-4299 Meeting Number: 260 281 465 Meeting Password: 94338372
Thursdays **10 a.m. – 11 a.m. PDT /** **11 a.m. – 12 p.m. CDT**	Invoice Processors	• Service confirmation creation and updates • Invoicing and credit memos	www.webex.com or Toll Free: +1 (855) 429-4299 Meeting Number: 965 126 536 Meeting Password: vZH22734326 (89422734 from phones)

Frequently asked supplier enablement questions

Q: Are all Chevron locations going live with SMART at the same time?

A: No. SMART is being deployed in a phased approach across all of Chevron's business units between 2019 and 2023.

Q: I have not received a registration email yet. OR, I need to be added as a user to my company profile.

A: Registration emails were sent from support@gep.com. Please verify the email was not sent to your Spam or Junk folder. If your company has not received a registration email, please contact supplier_enablement@chevron.com or your respective CBU Category Specialist. If your company is already registered in SMART from another Chevron BU deployment, your company's existing Primary Contact can add you as an additional user. Once approved by Chevron, those additional users will receive registration emails from support@gep.com.

Q: Who should we designate as Primary Contact?

A: The Primary Contact is the default email recipient for orders if a Buyer does not select a user from your company's profile. We recommend assigning a shared mailbox that multiple order processers from your company can access as the primary contact. All users can view and acknowledge the orders by logging in to SMART supplier portal.

Q: Our legal entity is incorrect / has changed. How do we update this in our profile?

A: Send an email to support@gep.com. The request will be routed to Chevron who will work with you directly to update this information.

Q: Our company has multiple legal entities; how do we know which legal entities were created in SMART?

A: Your company profile was created at the parent legal company level. Your ordering location legal entities are loaded within the parent company profile. Please work with your Chevron CBU Category Specialist if you have any questions about how your contract was set up in SMART.

Q: Payment terms in our company profile are not aligned to our contract.

A: SMART's standard configuration reflects Chevron's default 60-day payment terms. In the event your company and Chevron entered into a contractual agreement with negotiated payment terms other than 60 days, the negotiated payment terms continue to govern the payment term timing.

Q: The Category field in our profile does not match what we provide to Chevron.

A: The Category field in SMART is defaulted for all suppliers. You can disregard the category displayed in your profile. If you have a pricebook (catalog), the categories will be updated there at the line item level.

Q: Will our company be working in Ariba and SMART simultaneously?

A: Yes, if your company does business with more than one Chevron location until all locations are live in SMART.

Q: What is the cost to my company to transact in SMART by GEP?

A: There is no cost. SMART is always free to the supplier.

Q: My company does not want to register on SMART / we do not agree to the terms and conditions.

A: All suppliers must register in SMART to transact with Chevron CBU. If a supplier has a concern, a GEP representative will reach out to understand the concerns and discuss the SMART T&Cs. A meeting will be set up to engage the Contract Owner / Category Specialist if the concern is not resolved between GEP and the supplier.

Q: What browser should I use to access SMART?

A: SMART works best in Google Chrome.

Q: When will Supplier Enablement be escalated to the Contract Owner or Category Specialist?

A: Category Specialists (CS) will be notified if the supplier chooses not to register in SMART.

Additionally, if a supplier has questions about their MSA and the legal entities that have been migrated to SMART, SMART support will direct the supplier to the Project Data Migration Team and the respective Category Specialist.