

# GEP SMART Transition - Supplier Enablement Frequently Asked Questions

Updated September 2023



## Overview

**Purpose:** Provide answers to common questions regarding the transition to GEP SMART for supplier management, purchase order acknowledgement and invoice submissions.

**Audience:** ConocoPhillips Suppliers

**Contact:** For any questions regarding Supplier Enablement, contact us [here](#)

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# Key Terms & Acronyms

Term	Definition
<b>Action</b>	Third-party invoice platform that receives electronic invoice data.
<b>Advanced Shipment Notice (ASN)</b>	Notification where suppliers provide details to buyers around a pending delivery.
<b>Business Unit (BU)</b>	A division within ConocoPhillips that operates within a specific region such as Canada, Lower 48, Alaska, Corporate, Norway, Australia, etc.
<b>FI Invoice</b>	Type of invoice is not tied to a contract or purchase order.
<b>GEP SMART</b>	Cloud-based platform which provides an end-to-end procurement solution.
<b>iPay</b>	Invoice submission process where vendors submit invoice images sent either through email or paper invoices that are received and imaged in-house.
<b>MyVP</b>	My Vendor Portal is a website where Suppliers can access invoice, purchase order, and payment information.
<b>OFS Portal</b>	Member-based group of industry-leading upstream Oil & Gas suppliers and service providers used by some BUs to request and approve field Services.
<b>Operational Level Agreement (OLA)</b>	An internal agreement where Suppliers and ConocoPhillips define the material / service items, descriptions, rates, unit of measures and validity period. Can be associated with a Contract or as a standalone agreement.
<b>Pricebook</b>	A Pricebook is a list of agreed prices for items outlined in a Contract.
<b>Purchase Order (PO)</b>	Contractual document that is exchanged between a buyer and a Supplier listing materials and services that are to be procured.

**Service  
Confirmation**

The receipt created by the Supplier in GEP SMART for service-based line types.

# Platform

## **Is GEP SMART a commercially-available platform or is it created for ConocoPhillips use only? Compared to other mature invoice platforms, what can we expect from GEP?**

GEP SMART is a cloud-based procurement platform which provides an end-to-end procurement solution. GEP is currently being used by other companies in different capacities. ConocoPhillips is currently working with GEP to build a product that will support current processes.

## **Will GEP SMART be used for material and service orders?**

Yes, GEP SMART will be used for both material and service orders.

## **What browser works best with GEP SMART?**

While GEP SMART works with all browsers, Google Chrome is the preferred browser.

## **Will this system replace SAP?**

ConocoPhillips will still use SAP S/4 HANA as our financial system; however, all suppliers will only interact with GEP SMART. Additional information on this process for other business units is forthcoming.

## **Will GEP SMART replace Actian for invoice submission?**

Yes. GEP SMART will be replacing Actian in all business units beginning with Canada in August 2023 and additional business units at a later date. After GEP SMART is activated, all invoices will be submitted via GEP SMART and not Actian. Suppliers should continue to operate as they have been for other ConocoPhillips business units. After full implementation, suppliers can log on to GEP SMART portal to check payment status.

## **Is GEP SMART replacing both Actian AND MyVP?**

After GEP SMART is activated, all invoices will be submitted via GEP and not Actian. Suppliers should continue to operate as they have been for other ConocoPhillips business units. After full implementation, suppliers can log on to GEP SMART portal to check payment status.

## **Will GEP SMART replace ENFOS?**

No. Invoicing in ENFOS will continue as it is today. There will be no change for the supplier. Submitted invoices through ENFOS will interface to GEP for reconciliation and approval.

## **Will invoice history in MyVP and Actian transfer over to GEP SMART?**

No. Only outstanding invoices will be transferred to GEP SMART. We will make every effort to fully process all invoices submitted through the existing platforms (payment or rejection).

**Will ConocoPhillips continue to support invoices through iPay?**

The iPay replacement process will be communicated to relevant suppliers via an exception process.

**If a supplier currently uses iPay to submit invoices, do they need to use the new GEP SMART platform?**

Yes. The invoice submission method in GEP SMART will be agreed upon between suppliers and the respective ConocoPhillips business unit.

**If a supplier currently invoices under the FI (invoices not tied to a contract or purchase order) option through Actian, will they require a Purchase Order (PO)?**

The suppliers' buying channel will be communicated to them by ConocoPhillips. The supplier enablement team will work to communicate more details on the invoicing process closer to the implementation date.

**Suppliers currently have both PO and non-PO orders from ConocoPhillips. Will ConocoPhillips be changing to strictly PO based orders?**

This will vary by ConocoPhillips business unit and individual supplier circumstances.

**Is there an exception to utilizing GEP SMART for suppliers who only submit a low volume of invoices per year?**

Your invoice submission method in GEP SMART will be agreed upon between your company and the respective ConocoPhillips business unit. Please note that all suppliers will be required to use GEP SMART regardless of the invoice submission method.

**What is the size limit for attachments in GEP SMART?**

GEP SMART allows you to upload up to 10 files, with a file size limit of 10MB each. GEP SMART supports the following formats: .pdf, .jpeg, .jpg, .bmp, .gif, .tiff and .png.

## Business Process

**Do suppliers add bank details on Supplier Profile?**

Supplier should **NOT** edit the banking details in the Supplier Profile. Suppliers should only share banking details and sensitive information via the GEP Discussion Forum, as it is a controlled, secure environment to exchange restricted information and guarantees that information is being kept confidential.

**Are the currencies only in USD?**

Other currencies in addition to USD are available in GEP SMART. Suppliers can indicate their preferred order currency during the supplier registration process on the Supplier Registration Form.

**If suppliers currently bill against an Operational Level Agreement (OLA), how will the invoicing process work?**

If you are a supplier identified for OpenInvoice (referencing an OLA/pricebook), you will process electronic field tickets and invoices in OpenInvoice. Submitted invoices will be interfaced to GEP SMART for processing. ConocoPhillips vendor profiles and pricebooks will be managed in GEP SMART, so you will also be asked to complete registration for that platform.

If you are a supplier enabled for only GEP SMART, a PO will be required going forward. For most cases using services, a pricebook (previously OLA) will be linked to a PO allowing you to submit service confirmations referencing the applicable pricebook lines.

**Does the new GEP SMART process only affect billing/invoicing processes, or will it also be used for the quoting stage / bidding process?**

GEP SMART will also be used for quoting and RFI, RFQ, RFP processes.

**Can invoices in GEP SMART be future-dated?**

We are currently in the process of implementing a configuration change that will allow suppliers to have the ability to edit the supplier invoice date field. With this change, suppliers will be able to select either the current date or a past date, however, future dates will **not** be permitted.

**What if the material is a monthly rental. Would we get a new purchase order (PO) every month or will we be able to invoice every month under the same PO/material confirmation?**

The invoicing process would depend on how each supplier sets up their orders before Go-Live.

**If a supplier has been asked to participate in a Request for Proposal (RFP) event, but doesn't have a login yet for GEP SMART, can they be set up sooner?**

Yes. If a supplier has been asked to participate in a current RFP, all the necessary information on how to participate will be provided by the ConocoPhillips Supply Chain employee who invited them to the event.

**Will there be blanket POs per company or individual POs?**

The use of blanket POs versus individual POs will be determined based on the specific circumstances alongside the applicable ConocoPhillips business unit representatives. Open PO numbers will remain the same in GEP SMART so you can continue to use existing blanket POs if applicable.

**Can the same invoice include both services and materials?**

Both materials and services are allowed within a Service Confirmation. Material items on those submissions are meant to be materials consumed as part of services performed. As such, service PO-based invoices may also contain both materials and services.

**What are the timeline expectations for buyers to review and approve a PO change request?**

There will be internal key performance indicators (KPIs) to track and expedite handling time for 'Sent to Buyer' PO change requests in order to address them in a timely manner.

**With daily field tickets, will we need to get field tickets physically signed by the field staff before uploading the ticket into GEP SMART?**

To ensure prompt processing and payment, suppliers are encouraged to continue submitting signed backup documentation with all service confirmation and/or invoice submissions.

**Is there a max number of daily tickets you recommend per invoice?**

Suppliers can add multiple tickets per invoice or service confirmation, however, note that GEP only allows up to 10 file attachments.

**Currently through Actian, suppliers are required to have field tickets signed and coded before submitting for payment. Will this same requirement apply for GEP SMART?**

To ensure prompt processing and payment, suppliers are encouraged to continue submitting signed backup documentation with all service confirmation and/or invoice submissions.

**Is a Goods Receipt (GR) required before submitting an invoice?**

A GR is an internal ConocoPhillips document for materials purchases needed for a 3-way match between the Purchase Order, Goods Receipt, and invoiced quantity and the price. The GR is not required for invoices to be submitted but will be required for invoice payments to be processed.

**Is the service confirmation the same as submitting a field ticket for approval?**



A service confirmation and a field ticket are similar from a business perspective. A signed field ticket is required to be attached to service confirmation in order to be approved.

**Are service confirmations required by ConocoPhillips to submit invoices?**

A service confirmation against a valid PO is required prior to invoice submission for service-based transactions in GEP SMART. If you are a direct connect supplier, invoice submissions meet the minimum requirements.

**In order to submit a non-PO invoice do we also need a service confirmation?**

No, non-PO invoices are created from a blank template and are not tied to a service confirmation.

**Will service confirmation replace the Labor, Equipment and Materials (LEMs) we now send for approval?**

Similarly, to paper field tickets, LEMS are to be attached to the service confirmations in GEP SMART.

**Once we receive the signed service ticket back from the field consultant, is there a 'time sensitive' by which this field ticket must be entered into the service confirmation platform for approval?**

ConocoPhillips values processing payments in a timely fashion and the timeliness of the service confirmation process will ensure prompt payment. This will also improve our organization's ability to manage our accrual process.

**What is the expected lead time to approve service confirmation? If the service confirmation is not approved, who can we follow up with?**

Service confirmations should be approved within three days, or it will be escalated internally.

**Do suppliers need a WBS Element to submit the invoices to GEP SMART? If so, will ConocoPhillips share that information?**

A WBS element is one specific type of cost object. Valid cost object information includes the following: Cost Center, Network Number & Activity Code, Word Order Number and WBS Element. Valid cost object information will be shared with you by your ConocoPhillips field or other representative, which may include a WBS Element based on the type of work being performed. If you have received this information, we ask that you continue to populate this when you submit service confirmations or invoices whenever possible.

**If we have a service PO and need to enter 3rd party items, would this be added in with our labor and equipment or would this need to be submitted on a different service confirmation?**

This information would be added to the service confirmation in GEP SMART.

**Will the signed/stamped invoices with appropriate invoice coding still be a requirement with the new invoice submission process?**

Process requirements will be communicated by ConocoPhillips leading to the transition.

**Are there time limitations for the order acknowledgement process?**

No, there is no time limit for acknowledging PO's.

**Would the non-PO invoices also be invoices billed against an OLA or would that be perceived as a PO?**

Billing direct to an OLA will no longer be possible after Go-Live. ConocoPhillips will be using a similar process in GEP SMART to manage rates called a pricebook. Invoicing methods will vary by business unit, however billing using a pricebook will require reference to a PO.

**Is ConocoPhillips going to use standard payment terms or comply with contracted payment terms (i.e. 27 days)?**

GEP SMART supports compliance with contracted payment terms. There will also be default payment terms configured for each supplier in case no applicable contract is in place for a given transaction.

## Data

**Will OLAs change in any way? How will this change impact invoice submissions?**

OLAs will now be called pricebooks. Suppliers will **NOT** reference them directly as purchase orders will be created for invoicing. The pricebook will still be required for line-item reference, to ensure contractually negotiated rates are being adhered to. For all business units that may utilize additional invoicing platforms, requirements will be communicated in the onboarding sessions and during the transition period.

**Will the OLAs be transitioned from Actian to GEP SMART automatically?**

Yes. Active OLAs will be migrated to GEP as pricebooks.

**Will OLA Contracts be turned into a PO?**

No. OLA's will be converted to pricebooks. Catalog requisitions and POs will reference these pricebooks.

**Where do you get the pricebook information from?**

Existing OLAs in today's environment will migrate over to GEP pricebooks. The information should be the same and be associated with your GEP contract.

**Can your service confirmation and invoice have the same number?**

When you flip a service confirmation into a service invoice, the service confirmation number will come in as the default invoice number. Suppliers will have the option to modify this number in the portal.

**Will current Actian OLAs and supplier codes be added by ConocoPhillips, or will suppliers have to create and add their own pricebook?**

All relevant data needed to submit transactions will be migrated by ConocoPhillips and available in GEP SMART.

**Will there be any changes to the process for downloading the pricebook through the OFS Portal?**

Integrations between the OFS Portal and ConocoPhillips' new platforms continue to be worked. Additional details will be communicated as they become available.

**Will supplier vendor numbers change?**

Yes, new SAP S/4 HANA vendor numbers will be provided to suppliers by ConocoPhillips in the months leading up to the implementation date.

**How will existing POs be migrated into GEP?**

All relevant data needed to submit transactions will be migrated by ConocoPhillips and available in GEP SMART. Purchase Order numbers for existing or open POs will remain the same.

**Can existing POs in Actian be referenced in GEP, or will suppliers need to be issued a new PO for GEP?**

Existing POs can be used once they are migrated to GEP.

**Will PO numbers be replacing OLA numbers that are currently used in Actian?**

No. A PO number and OLA are different. A PO reference will be used as the purchasing document for invoices generated in GEP SMART. OLA numbers will be transitioned to pricebooks, which will be managed in GEP SMART. These numbers are expected to change as part of this transition.

**Can a service confirmation and invoice have the same number?**

When you flip a service confirmation into a service invoice, the service confirmation number will come in as the default invoice number. Suppliers will have the option to modify this number in the portal or keep it the same.

**Is the Network Number the same as the PO number?**

No. The Network Number (along with WBS and activity code) is a cost object used for accounting purposes. A purchase order number is a document reference number that specifies a list of materials or services ConocoPhillips is purchasing from a supplier.

**Will suppliers be able to search for or look-up certain criteria (ex. by location) for coding within the system?**

No. The GEP platform will not tie locations to account coding and will not have the ability to look up this type of information. A ConocoPhillips representative will be required to provide suppliers with the necessary information.

**Can suppliers check for invoice payment dates in GEP SMART?**

The scheduled payment date can be seen on each invoice submitted to ConocoPhillips. Once payment has occurred, remittance information can be found on each invoice in GEP SMART under Remittance Details.

**Can users backdate an invoice date?**

Yes. Users are able to backdate an invoice. However, please note that invoices should only be submitted for services and materials that have been delivered and/or completed prior to the invoice date.

**Are there differences in the way invoices must be formatted and data entered in GEP SMART compared to the current system?**

Yes, processes and data requirements will change because of this transition.

# Technical Functionality

**Can payment terms be changed/updated in GEP SMART?**

Payment terms are defined in the PO or contract in place with ConocoPhillips. If payment terms need to be updated, contact the ConocoPhillips contract administrator.

**Can suppliers export pricebooks from GEP SMART?**

Yes. Pricebooks are available for download from GEP SMART.

**Will there be an issue with the new GEP SMART system if suppliers do not currently have a pricebook entered given each service provided is job specific?**

GEP SMART supports the same service-based processes for scenarios where no pricebook exists.

**Does GEP SMART have a punchout/roundtrip scenario?**

Yes. GEP SMART supports catalog and/or punchout integration with suppliers. If you are identified as a catalog supplier for ConocoPhillips, GEP SMART will contact you to establish this connection.

**Can POs be sent to multiple contacts? If so, how do we flag to which contacts the PO must be sent to?**

Currently, there isn't the option to send POs to multiple contacts. The primary contact, which can be set on your Supplier Profile, will be the default email address used for sending purchase orders. Additionally, the ConocoPhillips buyer has the option to add one additional supplier contact to the order when submitting the PO. This contact must be registered and listed in the supplier's profile.

**Is there a way to differentiate a service PO from a materials PO?**

The Purchase Type will indicate whether the PO is a service or a material order. For service POs they will be labeled as "*Service Blanket*," material PO can be either be labelled as "*Standard*" or "*Stock*."

**Can anyone acknowledge a PO?**

Yes, any contact on the Supplier Profile can acknowledge the PO.

**How can we see who acknowledged the PO, and who the field approver is?**

Suppliers are unable to view the name of supplier contact who acknowledged the purchase order, only the buyer has access to this information. However, in the case of field supervisors, their information is visible in the service confirmation header. It's also available in the invoice.

**Is the order acknowledgement process the same for both material and service orders?**

The acknowledgement process remains the same for material and service PO's.

**Will there be one PO for every transaction, or will divisions receive blanket POs for a job or period of time?**

Whether there will be one PO for every transaction, or a blanket PO for a job or time period depends on how the supplier's specific contract is structured, and the type of service or material being provided.

**Does the supplier automatically receive a notification when a PO is sent, or do they need to check periodically?**

Yes. GEP SMART provides automatic email notifications to the primary contact and to the supplier contact entered while creating the PO. Suppliers will also receive notifications in the GEP SMART environment.

**When the PO is issued by ConocoPhillips, will there be a link to GEP SMART on the email?**

Yes, a link to the GEP SMART system will be embedded in communications that you receive from GEP SMART.

**Are suppliers required to provide a reviewer ID and approver ID in GEP SMART?**

For service-based submissions, the supplier has an option to specify a "Field Supervisor" which is the equivalent of the Reviewer ID in Actian. This is the ConocoPhillips representative who oversaw work being performed. For material-based submissions, no reviewer or approver ID will be required.

**Is there a mechanism to change the quantity/pricing when an uplift is required?**

Suppliers will have the ability to initiate a change request to update quantity and/or pricing of the order **only** before the PO is acknowledged in GEP SMART. If changes are needed after PO acknowledgement, suppliers would need to reach out to a ConocoPhillips buyer/representative to have quantity and/or pricing updated.

**In GEP SMART, do suppliers have to bill invoices exactly to the amount of the PO? Do suppliers need to ask for an increase in the PO?**

Yes. The invoice and PO amount should match exactly to avoid rejection or other system errors. Exceptions may apply depending on the type of PO. Please work with your ConocoPhillips Supply Chain representative in the case of exceptions.

**If a PO hits the limit, who do suppliers need to contact about increasing the limit of that PO?**

GEP SMART will allow supplier submission of service confirmations/invoices even after a PO limit has been reached. ConocoPhillips will have an internal process for reviewing supplier requests to make changes to a PO.

**Can you put more than one service confirmation onto an invoice?**

Only one service confirmation can be associated with each invoice.

**If you are already on the B2B integration, do you still fill out all the sublines for each line item?**

If a supplier submits invoices via B2B integration, they are still required to provide all applicable line-item detail with the invoice submission. The service confirmation submission process is relevant for web suppliers only and allows for that same line-item detail to be built out prior to invoice submission.

**Do we need approval each time for service confirmation, or will this information be stored?**

Every service confirmation submitted to ConocoPhillips will require business approval.

**Can freight be added to a service confirmation after the material invoice has been processed?**

It is not possible to include freight or other charges for service-based transactions – those price components are only applicable for materials. Once submitted, suppliers will not be able to edit the material invoice to add freight or other charges.

**Will suppliers receive a notice (e.g., email) when a service confirmation has been approved and is ready to be invoiced, or is rejected?**

Yes, the supplier will receive notifications in both of these cases.

**Do invoices need to be submitted into the GEP SMART portal manually?**

The invoice submission process will depend on a supplier's enablement type with GEP SMART.

- If you are a web supplier (i.e. you log into GEP SMART via the web), your invoices must be uploaded via the web portal.
  - If you are referencing a PO, relevant details are imported into the invoice to limit as much manual data entry as possible.
- If your company implements a direct connection with GEP, invoices will be submitted directly to GEP SMART through a business to business (B2B) direct connect integration.

**Can suppliers create invoices in their internal systems and attach a copy in GEP?**

Yes. Suppliers should continue to create invoices in their internal system and then save a PDF copy of it, which should be attached to the invoice submission GEP. Requirements for other invoicing methods will be managed in alignment with those system requirements.

**Are invoices auto populated in GEP SMART like they are in Action or do suppliers need to enter everything?**

When submitting a PO-based invoice, GEP SMART will enter as much default information as possible to minimize manual data entry.

**Does GEP SMART allow suppliers to submit multiple invoices at the same time?**

Yes. Suppliers can create multiple invoices in GEP SMART, although they must be submitted one at a time.

**Can you partially invoice a PO?**

Yes. For materials, suppliers can edit the quantity being invoiced to submit a partial invoice. For services, all service confirmation submissions will be partial, as you are submitting against a blanket services PO.

**Will supplier receive an email if an invoice gets rejected?**

Yes, suppliers will receive email notifications when an invoice is rejected.

**Would suppliers receive a confirmation number if the invoice has been submitted successfully?**

No, there is no confirmation beyond the success message pop-up that is displayed.

**If we are not able to adjust pricing on a material invoice, what do we do when the purchase order pricing differs from our invoice?**

The change order process is designed to accommodate requests for price changes. Please note that once a PO is acknowledged, a supplier cannot initiate a pricing change request. In this case, a supplier must reach out to a ConocoPhillips representative to have pricing updated.

Shipping, other charges, and tax can all be added at the time of invoice – the price lock is only on the line-item material unit prices.

**Will the ability to email invoices directly into GEP SMART be available?**

Feasibility is being considered and decided on a case-by-case basis, however, email submission of invoices is not preferred.

**Can special characters be used when submitting invoices in GEP SMART?**

Yes. GEP SMART allows suppliers to use special characters in the invoice number field.

**GEP SMART currently has an invoice line limit of 250 lines. Is there a workaround for this?**

No. There are no plans to change the way GEP SMART works in this regard.



**Will GEP SMART display visibility into invoice and payments status, including the individual holding the invoice, as it currently does in Actian /MyVP?**

Visibility into invoice and payment status will be available within the GEP SMART portal.

**Currently GEP SMART does not allow suppliers to send a credit invoice unless the original invoice is in GEP SMART, which can be problematic. Will ConocoPhillips make a modification to the system to change this?**

The only submission method for credit invoices at this time will be with reference to a valid original invoice.

**Are we required to upload field tickets daily or can they be combined and uploaded weekly?**

Service Confirmation submissions can include multiple field tickets in a consolidated fashion, so you may submit on a periodic basis if you wish.

**If you have an invoice that you need to credit one item on the invoice, do suppliers need to credit the whole invoice back and resubmit or can you choose that one item?**

In GEP SMART, one can specify a specific line item contained from an original invoice to credit.

**What are the different methods of submitting bulk invoices in GEP SMART?**

GEP SMART does not support bulk upload of multiple separate invoices. However, GEP SMART does support bulk upload of service confirmation in the web portal using a template. Training materials on how to do bulk uploads can be viewed through Jira Service Management (JSM).

**Will remittances still be emailed out, or will we have to log on to GEP SMART to obtain our remittances?**

No. Suppliers will need to log into GEP SMART to review remittance information.

## Integration

**Will you have a B2B integration option? What is the criteria for becoming a B2B supplier?**

We do have options for B2B integration via PIDX or cXML methods. If you are currently a B2B supplier with ConocoPhillips today, you would have received communications to proceed with GEP integration. If you are not a current B2B supplier but have interest in becoming one, we will need to evaluate each supplier on a case-by-case basis at a later date. You can contact the [ConocoPhillips Supplier Enablement Team](#).

ConocoPhillips does not have any formal requirements for suppliers to utilize a B2B integration. Priority is generally given to those suppliers with higher volumes of transactions with ConocoPhillips.

**Can suppliers integrate with GEP instead of using the portal? If so, are attachments supported on invoices?**

Yes. If ConocoPhillips confirms a supplier as an integrated or direct-connect supplier, they can establish an integration. Other invoicing methods may be available for other business units, additional information is forthcoming.

If suppliers integrate using cXML or PIDX, they will be able to send attachments on invoices.

**Will ConocoPhillips be providing suppliers with a contact to have invoices sent via automated submission?**

Suppliers have been pre-identified for direct connection integrations. GEP will be reaching out to each company individually to discuss integration project plans.

**Can suppliers use a PIDX file in GEP SMART?**

If you are already submitting PIDX invoices according to the ConocoPhillips standard, you have been identified as a direct connect supplier. GEP SMART will be reaching out to you to ensure you understand any technical changes necessary to continue submitting invoices via PIDX, as there are several changes coming to the ConocoPhillips PIDX standard.

**Will ConocoPhillips help set up the PIDX file in GEP SMART like they did for Actian, or does the GEP SMART team help with that?**

GEP will provide technical support to ensure proper PIDX files are being submitted. ConocoPhillips Supplier Enablement will be included as needed.

**When will ConocoPhillips provide XML mapping for the new configuration of GEP SMART?**

Suppliers have been pre-identified for direct connection integrations. GEP will be reaching out to each company individually to discuss integration project plans.

**Does ConocoPhillips work with B2B integration companies such as i2X Next Gen Software?**

If you are working with a third-party platform to transmit invoices electronically, please inform the ConocoPhillips Supplier Enablement Team.

# General

## **Do suppliers need a different GEP SMART account for each business unit, (e.g., Alaska, Lower 48, Corporate, etc.)?**

Suppliers will only need one set of login credentials to access ConocoPhillips's GEP SMART system.

## **Is GEP SMART free for suppliers outside the United States as well?**

Yes, GEP SMART is free for all suppliers, there are no additional costs to transact with ConocoPhillips.

## **Do suppliers need to purchase GEP SMART, or will ConocoPhillips provide a supplier portal to log into to use this service for managing orders and invoices?**

As part of the onboarding process, suppliers will receive credentials and other relevant information to log into GEP SMART. There are no additional costs to transact with ConocoPhillips.

## **Why is this transition to GEP SMART happening now?**

ConocoPhillips has made the decision to upgrade its Enterprise Resource Planning (ERP) software. With the upgrade, current and new vendors will be required to be set up in the new system.

## **Who is the business contact within the company?**

A business contact is an individual designated by the supplier as the primary supplier point of contact that would potentially receive POs or important communications from ConocoPhillips.

## **Is this transition to GEP SMART a requirement to remain a supplier?**

Yes. ConocoPhillips will not be supporting previous systems and invoice submission channels past the applicable implementation dates for each business unit.

## **Is this system update taking place across all ConocoPhillips business units?**

Yes. This will be a global transition with phased deployment dates based on business unit.

## **Does this transition to GEP SMART apply to both ConocoPhillips and Phillips 66? Are both companies moving to the GEP SMART platform?**

This transition is relevant for ConocoPhillips only.

# Timeline

## **Will we be able to do testing before Go-Live?**

There is no testing conducted with web portal suppliers.

## **Aside for Canada suppliers, will GEP also extend to the U.S. suppliers this year? If so when?**

We have plans to implement GEP globally, but Canada is the only region that will transition to GEP in 2023. We are evaluating the best time for the U.S. to transition GEP and do not have a firm date to share at this time.

## **When will we be able to create service confirmations in our GEP SMART environment?**

All GEP SMART capabilities will become available on Go-Live.

## **What are the implementation dates for GEP SMART across business units?**

Suppliers will receive formal communication from ConocoPhillips with details regarding implementation dates and invoice process instructions for respective business units. The latest enablement timeline and key dates can be found on the ConocoPhillips Vendor Relations website.

## **If a supplier invoices multiple business units (i.e. Alaska, Lower 48, Canada, etc.) will they need to submit invoices in a mix of Actian and GEP SMART portals?**

Yes. Due to the staggered roll-out schedule, suppliers who service multiple business units will need to submit invoices in the appropriate system until the entire company has completed the transition.

# Training & Enablement

## **Are supplier logins for Actian the same for GEP SMART, or do they need to create a new login? How do new users gain login credentials?**

No. Actian and GEP SMART are separate platforms with separate logins. Actian will no longer be used after the new system is deployed. A system-generated primary registration form will be sent to suppliers, which can in turn be used to create login credentials.

## **How many user roles are available within the system?**

There is no limit to the number of users that can be added on a supplier profile in GEP SMART.

**When we add users/contacts, will they all have the same level of access as the admin?**

Yes, all contacts will have same level of access in GEP SMART.

**Can suppliers have multiple contacts for orders instead of just a primary (e.g., contact by location and by product company)? Can suppliers set up login credentials with different levels of security?**

Yes, in addition to the primary contact, suppliers have the option for one additional contact to receive PO email notifications. This contact would only receive notifications if the buyer adds them as an additional contact when submitting the PO. This contact must be registered and listed in the supplier's profile.

In terms of logins and access, all supplier contacts will have the same set of access in their profiles. The primary contact can add multiple contacts to their supplier profile with separate logins for each individual.

**What happens when we need more than one primary contact? (e.g., multiple people who do quotes and purchase order processing?)**

There can be only one primary contact on the supplier profile. If you have a mailbox group setup that distributes to multiple people, you can assign this email address as the primary contact to receive POs.

**If suppliers service another customer currently set up in GEP SMART, will both customers display in the portal?**

Yes. Suppliers can use the same log in credentials for different clients. During the registration process for ConocoPhillips, select "I have a SMART by GEP" account option. Note: When going through the registration process, the new contact should log out of all other GEP domains.

**Will suppliers receive training on how to submit invoices in GEP? Will there be documentation made available as well?**

Yes, prior to full implementation, GEP will conduct training on the use of the GEP SMART portal. They will provide all the necessary documentation and training material.

**How do suppliers register multiple people for the GEP SMART training?**

Training will be scheduled and conducted by GEP SMART. To receive communications and an invitation to future training sessions, the invoice administrator or anyone else who is required to attend the training **must be registered** and added as a contact in GEP SMART.

**Will suppliers be provided with a process document on how to upload invoices to GEP SMART?**

All suppliers will receive training describing how to submit service confirmations and/or invoices in GEP SMART. Additional support documentation on these processes are available within the GEP SMART platform.

**Are suppliers working directly with GEP SMART technical team for any required development to transition to the new platform?**

For B2B suppliers, GEP SMART will proactively reach out to initiate integration conversations to ensure any technical development needs are addressed.

**Will suppliers have the option to test the interface process once Actian is converted to GEP SMART?**

GEP SMART will conduct very rigorous testing with integrated suppliers for all in-scope documents. Training will be provided to Web Portal suppliers on how to use GEP SMART's web portal for PO management and invoice processing.

**What will the GEP SMART testing process look like?**

ConocoPhillips will provide suppliers with enablement details and depending on the level of integration, a testing plan will be provided at the time of onboarding and training.

**Will there be enough time to allow for sufficient testing prior to transitioning from Actian to GEP?**

Some suppliers have been pre-identified for direct connection integrations. GEP will reach out to suppliers that have been identified for integration to discuss integration project plans, accommodating schedules as best as possible.

**Is there anything suppliers should be doing prior to going live (e.g., account creation, testing, etc.)?**

ConocoPhillips will provide suppliers with enablement details and instructions depending on their level of integration. Ensuring your account is created, quickly responding to communications, and registering for and completing trainings can help the process run smoother.

## Support

**How can suppliers access the GEP SMART Portal?**

Suppliers can access the GEP SMART Portal by clicking [here](#).

**Who can suppliers contact for support, or to ensure they are receiving updates?**

For technical support, suppliers can email to [support@gep.com](mailto:support@gep.com) or call +1-732-428-1578 (in US/Canada) or +61-2-8518-1914 (in Australia) for assistance. For support, suppliers can email [ConocoPhillips Supplier Enablement Team](#).

**How long will it take to get help from the email support team? Is it required to submit a GEP Support ticket?**

For any GEP SMART inquiries, you may contact [support@gep.com](mailto:support@gep.com) and a GEP representative will respond to you. Please note that GEP SMART provides 24-hour support, Monday through Friday (U.S. Time).