Oracle® iSupplier Portal

User's Guide

Release 11i

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Oracle iSupplier Portal User's Guide, Release 11*i*

Part No. B10977_02

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Preface

Intended Audience

Oracle iSupplier Portal is a collaborative application enabling secure transactions between buyers and suppliers using the Internet. Using Oracle iSupplier Portal, suppliers can monitor and respond to events in the procure-to-pay cycle.

This guide contains information on how to use the Oracle iSupplier Portal application. This guide assumes you have a working knowledge of the principles and customary practices of your business area.

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Conventions

The following conventions are used in this manual:

Convention	Meaning
boldface text	Boldface type in text indicates a term defined in the text, or denotes a title of a page.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

1

Introduction to Oracle iSupplier Portal

Oracle iSupplier Portal enables a buying company to communicate key procure-to-pay information with suppliers. As a supplier using Oracle iSupplier Portal, you can view and acknowledge purchase orders, submit change requests, create advance shipment notices, view receipts, view inventory levels, view invoices, and view payments. As a buyer using Oracle iSupplier Portal, you can view order, shipment, receipt, invoice, and payment information.

This chapter is an introduction to Oracle iSupplier Portal, and includes the following topics:

- About Oracle iSupplier Portal on page 1-2
- How to Use This Guide on page 1-2

About Oracle iSupplier Portal

Oracle iSupplier Portal is a collaborative application that enables buying companies and their suppliers to communicate with each other. It enables suppliers to have real-time access to information (such as purchase orders and delivery schedules) and respond to the buying company with order acknowledgments, change requests, shipment notices, and planning details. It also allows buying organizations to search for order, shipment, receipt, invoice, and payment information across all suppliers and all business units, as well as respond to supplier change requests.

> **Note:** Oracle iSupplier Portal supports both transaction documents and view-only documents. Using transaction documents, you can submit acknowledgments or change requests on a Purchase Order, or initiate transactions such as advance shipment notices, advanced shipment billing notices, and invoices. Using view-only documents, you may view forecast schedules and payments.

How to Use This Guide

This guide is organized to help you learn, use, and understand Oracle iSupplier Portal.

Getting Started Information

Chapter 1 Explains how you get started using Oracle iSupplier Portal. This chapter includes details of where you start using the system depending on your current relationship with the buying company.

Chapter 2 Explains how to register your company with the buying company and how to get Oracle iSupplier Portal user accounts for your employees. If you already have access to Oracle iSupplier Portal, then you do not need to read this chapter.

Chapter 3 Explains how to navigate through the system. The chapter also includes searching tips and techniques.

Transaction and View-Only Document Information

Chapter 4 Explains how to view and respond to order-related documents such as purchase orders, work orders, and supplier agreements.

Chapter 5 Explains how to access shipping information and create advance shipment notices (ASNs or ASBNs). The chapter also includes information on viewing receiving and quality transactions.

Chapter 6 Explains how to access planning and inventory information, as well as how to maintain item and capacity information.

Chapter 7 Explains how to access invoice and payment information. The chapter also includes information on how to submit invoices if the buying company has Oracle Payables installed.

Profile Information

Chapter 8 Explains how to maintain information about your company using the Supplier Profile Management feature.

Buying Company View Information

Chapter 9 Explains the buying company view of iSupplier Portal.

Where to Start

Before you can access Oracle iSupplier Portal:

1. Your company must be registered as a supplier to the buying company that has licensed Oracle iSupplier Portal.

2. You must be registered as an Oracle iSupplier Portal user.

> **Note:** If you are already a supplier to the buying company and you can log into Oracle iSupplier Portal, then you and your company have already completed both of the registration tasks. You can skip chapter 2. If you do not have access to Oracle iSupplier Portal, see chapter 2 for registration instructions.

After you are registered, you can access Oracle iSupplier Portal. The tasks you perform on Oracle iSupplier Portal are determined by your current supply chain business relationship with the buying company. The tables below list the tasks you will likely perform; where you start depends on what you want to accomplish:

If the buying company has ordered goods or services from you, you can

Tasks	Where Documented
View existing orders from your buying company, including any attachments.	See Order Information
Acknowledge and submit change requests to purchase orders.	See Order Information
Submit your electronic signature while acknowledging a purchase order.	See Order Information
View and print Portable Document Format (PDF) versions of purchasing documents, including blanket agreements, clauses and other contract terms.	See Order Information
View your current purchase agreements (if any) with the buying company.	See Order Information
View an audit trail of any revisions for a purchase order.	See Order Information
Manage deliverables assigned to you (available only if the buying company has implemented Oracle Procurement Contracts).	See Order Information
View timecard information (available only if the buying company has implemented Oracle Services Procurement and Oracle Time and Labor).	See Order Information
Let your buying company know that goods are ready for shipment by uploading a routing request.	See Shipping Information
View buying company's response to your routing request.	See Shipping Information
Alert the buying company of any upcoming deliveries by sending advance shipment notices (ASN) or advance shipment billing notices (ASBN).	See Shipping Information
Upload advance shipment notices (ASN) or advance shipment billing notices (ASBN) to the system using spreadsheet functionality.	See Shipping Information
View and enter item quality results and check for correspondence from the buying company (available only if the buying company uses Oracle Quality).	See Shipping Information
View receipts, returns, and delivery performance.	See Shipping Information

If you have already made a shipment to the buying company, you can:

Tasks	Where Documented
View invoices and received payments.	See Invoice and Payment Information

Tasks	Where Documented
Submit invoices by selecting a purchase order and direct-billing the buying company (available only if the buying company uses Oracle Payables).	See Invoice and Payment Information

If you require a third-party shipment before you can complete the buying company's order, you can:

Task	Where Documented
View work orders to check the status of third-party (outside processing) orders or shipment plans.	See Order Information and Shipping Information

If you want to view and update your inventory information, you can:

Tasks	Where Documented
View item inventory levels.	See Planning and Inventory Information
Maintain item attributes, such as delivery capacity and lead times.	See Planning and Inventory Information
Enter capacity information and view on-hand delivery items.	See Planning and Inventory Information
Define inventory lead times and order modifiers.	See Planning and Inventory Information
View vendor managed inventory items (if items are set up as a vendor managed items) and generate supply requests to manage reorder points and replenishments	See Planning and Inventory Information
View consigned inventory stock and view transactions associated with that stock.	See Planning and Inventory Information

If you want to view forecast demand so you can evaluate your supply plans, you can:

Task	Where Documented
View forecast schedules.	See Planning and Inventory Information
View a summary of forecast schedules.	See Planning and Inventory Information

If you want to update your company's profile information, you can:

Task	Where Documented
Enter address book information, contact directory information, business classifications, and products and services you provide.	See Supplier Profile Management

If you want to negotiate to supply goods to the buying company, you can:

Task	Where Documented
View buyer requests for quotes (RFQs).	See RFQs

If you are a buyer, you can:

Task	Where Documented
View order, shipment, receipt, invoice, and payment information.	See Buyer information
Search for order, shipment, receipt, invoice, and payment information across all suppliers and all business units.	See Buyer information
Respond to supplier change requests.	See Buyer information

2

Registration

You register your company as a prospective vendor in Oracle iSupplier Portal to let the buying company know that you are interested in establishing a business relationship. After you are registered, additional supplier users within your company can be registered to access and use Oracle iSupplier Portal. This enables you to communicate, to a buying company, real-time information about your procure-to-pay transactions.

> **Note:** If you are already a supplier to the buying company and you can log into Oracle iSupplier Portal, then you and your company have already completed both of the registration tasks. You can skip chapter 2.
>
> If no one in your company can access Oracle iSupplier Portal, your company is not registered with the buying company, and you need to register your company before you register your supplier users.
>
> If other supplier users in your company can access Oracle iSupplier Portal (and you cannot), your company is registered, however, you need to register for access to Oracle iSupplier Portal.

If you are a prospective supplier, you need to read the entire chapter and complete all of the registration steps. If your company is already registered with the buying company and you only need to add yourself as a user, you only need to read and complete the Registering Users task.

This chapter includes the following:

Registering Suppliers

Self-service prospective vendor registration enables you to register your interest in establishing a business relationship with the buying company. Once registered, you can provide details about your company and describe the types of goods and services you provide.

You need to provide your company name, key tax identification details, and main company address. This information is verified against existing records to ensure that duplicate registration information is not recorded. If company information is already approved in the buyer's system, an e-mail is sent to your current company contact regarding the new registration request.

Figure 2–1   Supplier Registration page

You must also provide contact information so the system can send updates on the registration request. After completing the registration, you receive a confirmation that the request has been submitted for review. After you submit a registration request, the information is routed to a buyer administrator for review. The buyer administrator will then evaluate the registration request; you are notified of the decision by e-mail.

Registering Users

The buying company initiates the process of adding new suppliers by inviting supplier users to register, or by registering supplier users directly. If you receive an invitation to access Oracle iSupplier Portal, you can respond to the invitation (and provide user profile information, such as name and contact details), or forward the invitation to another user in your company. For example, the buying company may send an invitation to the Vice President of Sales within your organization; he can forward it to the appropriate person in his company. The user who responds can change any of the details except the name of the supplier company for whom he or she is registering.

If your buying company has multiple definitions for the same supplier, or if a supplier has multiple subsidiaries, your buying company may give you access to view information for multiple supplier definitions.

Figure 2–2 Supplier User Registration page

A buyer administrator will approve or reject the user's registration. The user receives notification of the buyer administrator's actions. The notification includes the URL at which the user can access the network, plus any additional information such as the username and a system-generated password needed for initial login. (The user will be prompted to change this password after first login.)

If the buying company chooses to register a new user account directly, the user will receive an e-mail notification with the URL, username, and system-generated password.

If additional people in your company need access to Oracle iSupplier Portal, they should contact the buyer administrator to request additional accounts.

3

Navigating and Searching

This chapter includes information to help you learn how to navigate and search in Oracle iSupplier Portal. After you learn the basic techniques, you will be able to search for transaction information, and respond accordingly.

This chapter includes the following information:

- Using the Oracle iSupplier Portal Home Page on page 3-2
- Setting Up User Preferences on page 3-5
- Searching on page 3-7

Using the Oracle iSupplier Portal Home Page

When you access the Oracle iSupplier Portal application using the username and password provided to you, the **Oracle iSupplier Portal Home** page displays.

This page provides the following information:

Figure 3–1   Global Buttons

Home Logout Preferences Help
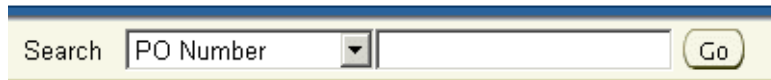
Global buttons The following buttons display on the home page and all Oracle iSupplier Portal pages:

- Home - Returns you to the main portal where you can select another responsibility or application.

- Logout

- Preferences - Displays the **Preferences** page. See Setting Up User Preferences on page 3-5.

- Help - Accesses the help index page.

Figure 3–2   Tabs
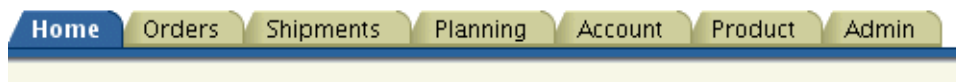
| Home | Orders | Shipments | Planning | Account | Product | Admin |

Tabs Oracle iSupplier Portal provides tabs for easy navigation. For example, if you want to view purchase order details, start by clicking the Orders tab, and then click Purchase Orders in the task bar directly below the tabs.

Figure 3–3   Search

Search The Search field enables you to enter a document number and quickly find information about:

- Purchase orders
- Shipments
- Invoices
- Payments

To search for a document:

1. Select which type of document you would like to search.
2. Enter the document number and click Go.

Figure 3–4   Quick Links, Notifications, Orders at a Glance, Shipments at a Glance

Quick Links This section displays a procure-to-pay flow through the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.

Notifications Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the **Notification Details** page. This page provides complete notification details, as well as the appropriate action button.

After you select an action, the **Notifications Summary** page displays.

- You can continue to respond to any additional notifications you have.

- You can continue working by clicking any of the tabs.

Orders at a Glance This section displays the five most recent purchase orders. Click a purchase order number to view purchase order details.

Shipments at a Glance This section displays recent shipments. Click a shipment number to view a list of your recent shipments.

To view a complete list of your Notifications, Orders at a Glance, or Shipments at a Glance, click Full List.

Setting Up User Preferences

You can change your user settings or preferences at any time using the Preferences icon. You can change the following preferences:

- General - You can select your language, territory, time zone, client character encoding (the character set that's used in your page display), and accessibility features (such as screen reader use).

  > **Note:** Date and time values are always displayed to you in the time zone you set in your user preferences, even if your buying company is in a different time zone.

- Notification - You can select how you want to receive your notifications (for example, in HTML or plain text e-mail).

- Formatting - You can define your date format and number format.

- Password - You can reset or change your password. A valid password must be at least five, but no more than 30, characters. Passwords can be numeric, alphanumeric, or special characters.

To change your preferences:

1. Click the Preferences icon.

2. On the **Preferences** page, enter your name in the Known As field.

Figure 3–5   Preferences page

3. Complete or update the required fields.

4. Click Apply to save your changes. Click Cancel to return to the system without making any changes.

Searching

Oracle iSupplier Portal provides extensive search criteria on all pages to help you retrieve information. The search results have a number of columns that you can sort for your data. Some common search fields are PO number, Invoice Number, Payment Number, Date, and Status.

You can use the percent sign (%) as a wildcard to search for generic items. For example, to search for all orders beginning with 27 and end in a 5 (such as 275, 2715, 27125) enter 27%5. The% wildcard does not control the number of wild characters.

> **Note:**   The search logic attempts to find matches containing values in any position.

Using "Advanced Search," you can build and narrow searches with the available search operators. Search operators enable you to specify the matching conditions for a search. Available search operators are:

- is - Use this operator for an exact match.

- is not - Use this operator to exclude a specific match.

- contains - Use this operator to find a partial match.

- starts with - Use this operator to find a partial match only at the beginning.

- ends with - Use this operator to find a partial match that only ends with your criteria.

- greater than - Use this operator to include results greater in value than a value specified.

- less than - Use this operator to include results lower in value than a value specified.

- after - Use this operator to include results with a date after the specified date.

- before - Use this operator to include results with a date before the specified date.

4

Order Information

Order Information

The real-time data provided in Oracle iSupplier Portal allows you to communicate procure-to-pay information with the buying company while viewing the purchase order flow.

Using purchase order information, you can acknowledge purchase orders, make change requests to purchase orders, split shipments, or cancel orders. You can also view supplier agreements and the revision history of a purchasing document.

This chapter includes the following:

Purchase Orders

When your buying company enters a purchase order in Oracle Purchasing, the purchase order details are available to you in Oracle iSupplier Portal. The **Purchase Orders Details** page enables you to view details of the entire purchase order. Oracle iSupplier Portal enables you to track your purchase orders throughout the procure-to-pay flow. You can also submit adjustments to your purchase orders.

The purchase order section includes:

- Viewing Purchase Orders on page 4-2

- Printing Purchase Orders on page 4-5

- Acknowledging Purchase Orders on page 4-6

- Submitting Change Requests on page 4-9

- Splitting Shipments on page 4-12

> **Note:** For the pages mentioned in this chapter, you may view details to various attributes by clicking the link associated with that attribute.

Viewing Purchase Orders

You can view details such as terms and conditions, lines, shipments, and attachments. When you navigate to the **View Purchase Orders** page, the most recent 25 purchase orders are displayed. Alternatively, you can view all orders that require acknowledgment, and all orders pending supplier change.

An advanced search is available to define your search even further. You also have the option to export the displayed data.

Figure 4–1   View Purchase Orders page

To view purchase order header and line details, click the purchase order number.

Figure 4–2   Order Details section of View Order Details page

Figure 4–3   PO Details section of View Order Details page

On the **View Order Details** page, you can view the order and PO details .

> **Note:**   In the PO Details section, to view Details, click Show. To hide details, click Hide.

Figure 4–4   Related Information Section of View Order Details page

You can also view receipts, invoices, and payments related to the selected order by clicking the Receipts, Invoices or Payments in the Related Information section on the **View Order Details** page.

In addition to viewing purchase order details, you can submit acknowledgments to orders for which a buyer has requested acknowledgment, as well as submit an electronic signature of approval to a buyer. You can view a history of change requests submitted, as well as a buyer's response to each change request.

Printing Purchase Orders

You can view and print Portable Document Format (PDF) versions of purchasing documents, including blanket agreements. If your buying company has implemented Oracle Procurement Contracts, you can also print the contract terms or clauses that the buying company has defined on the purchasing documents.

To print purchase orders:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Click the PO Number of the purchase order you would like to print.

3. Click Printable View.

4. A PDF version of your purchase order appears. You may print your PDF from here.

Acknowledging Purchase Orders

When creating a purchase order, buying companies can request acknowledgment of the purchase order. If so, you will receive a notification requiring your response. The purchase order may include a date by which you need to acknowledge or sign it.

You acknowledge purchase orders to communicate to the buying company that you have received, reviewed the details of, and accepted or rejected a purchase order. You can also communicate changes to the purchase order during acknowledgment.

You can either acknowledge the order online, or accept or reject the order using the notification. The notification does not allow shipment level acknowledgment, which must be entered online. When you respond, the purchase order is automatically updated, and a notice is sent to the buyer.

You can submit acknowledgments for an entire order, or for individual shipments. For example, if you can fulfill only part of a purchase order, accept the shipments you can fulfill, and reject the others. You can also communicate change requests during acknowledgment. For example, if you cannot fulfill a shipment on the given date, but can fulfill it a few days later, you can communicate a date change request instead of rejecting the shipment line.

To acknowledge purchase orders:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Select Purchase Orders to Acknowledge, and then click Go. If you know the PO number of the purchase order you would like to acknowledge, you can use advanced search to display purchase orders.

3. Select a purchase order with a status of Requires Acknowledgment, and click Acknowledge.

4. On the **Change Purchase Order** page, you can accept or reject an entire order, or you can accept or reject individual shipment.

Figure 4–5   Change Purchase Order page

Order Level acknowledgment:

- To accept an entire order, click Accept Entire Order, enter a a note to your buyer, and click Submit.

- To reject an entire order, click Reject Entire Order, enter a note to your buyer, and click Submit.

Shipment Level acknowledgment:

- To respond at a shipment level, in the PO Details section, make your changes. Enter the response reason, and click Submit. The available actions at the shipment level are Accept, Reject, and Change.

After you have completley acknowledged the order, the buyer is notified of your acknowledgment response.

Signing Purchase Orders

If your buying company has implemented Oracle Procurement Contracts, your buyer may ask that you electronically sign a purchasing document while

acknowledging it. Legally binding purchasing documents must be signed by both the buyer and supplier.

After you sign the document, your buyer will be notified. The purchase order will be ready for execution after both the buyer and supplier have electronically signed the purchasing document.

> **Note:** If your buyer asks that you electronically sign a purchasing document, you cannot respond at a specific shipment level, you have to accept or reject the entire order.

To sign a purchase order:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select the purchase order with a status of Requires Signature, and then click Acknowledge.

3. On the **Change Purchase Order** page, click Sign Document.

4. Click any attachments you would like to view to review the attachments for terms and conditions.

5. Click Accept or Reject.

6. On the **Notification Signing** page, enter your username and password and click Submit.

Figure 4–6   Notification Signing Page

Notification Signing Page

Cancel

Sign

Please sign or cancel.

Subject:Blanket Purchase Agreement 19488,0 requires your signature
To: SUPPLIER
Enter comments. If you reject the agreement, enter a rejection reason.: This agreement looks OK - will sign and accecpt
Result: Accept

By entering the information requested below, you are electronically signing this document.
User Name   supplier
Password   *******

Cancel

7. You will receive confirmation that your purchase order has been acknowledged.

Submitting Change Requests

Oracle iSupplier Portal enables you to request changes to purchase orders when modifications are needed to fulfill an order. You can make changes during and after acknowledgment.

To submit change requests:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. On the **Purchase Orders** page, search for and select a purchase order.

3. Click Request Changes.

4. On the **Change Purchase Order** page, enter your changes. If you would like to make changes to shipment details, click Show.

Figure 4–7   Change Purchase Order page

5. You may request changes to:

- Price/Price Breaks on Blanket Agreements

- Supplier Item

- Quantity Ordered

- Promised Date

- Supplier Order Reference Number

- Additional Change Requests - use this text box if you would like to submit more changes than offered above. You may enter both order and line reference numbers. If you would like to split a shipment, see Splitting Shipments.

In the reason text box, you can enter a reason for your change request.

6. Click the appropriate action button from the action list. Enter your reason for change, and then click Submit.

> **Note:** After submitting your changes, the purchase order status changes to *Supplier Change Pending* until the buyer approves the changes.

To view change order history:

This view enables you to view the history of change requests submitted on a document, and the corresponding buyer response.

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select a purchase order, and then click View Change History.

3. View the change order history details on the **PO Change Order History** page.

Figure 4–8   PO Change History page

4. Click OK to return to the **Purchase Orders** page.

Splitting Shipments

You can request to split a shipment. For example, if you can only partially ship the quantity ordered for the given date, you can enter a split shipment change request. This request will let the buyer know the number of items you can deliver and what date you will deliver them.

To request to split a shipment:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select a purchase order, and then click Request Changes.

3. On the **Change Purchase Order** page, click Show to display shipment details.

4. Click the split icon on the desired shipment line. (Another row is added for your split shipment).

Figure 4–9   Change Purchase Order page

5. In the Quantity Ordered field of the first shipment line, enter a new quantity.

6. In the Quantity Ordered field of the second shipment line, enter the new quantity.

7. Change the Promised Date.

8. Enter the Supplier Order Line.

9. Enter a reason for splitting.

10. Select an action for change.

11. Click Submit.

Note: You can split a shipment as many times as needed. To create more shipment lines, click the split icon.

Canceling Orders or Shipments

You can submit cancellation requests for an entire order or a particular shipment. You can also submit changes and cancellations at the same time.

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select a purchase order, and then click Request Cancellation.

3. On the **Request Cancellation** page, click Cancel.

Note: To cancel a few shipments, but not the entire order, click Show in the PO Details section, and then select Cancel from the Action list of values (on the shipment line you want to cancel). Enter a cancellation reason, and then click Submit.

Figure 4–10   Request Cancellation page

Managing Deliverables

If your buying company has implemented Oracle Procurement Contracts, you may have deliverables assigned to you. Deliverables are tasks to be completed in order

to achieve a certain outcome or business objective, and may be used to track projects for compliance reasons and risk reduction.

For example, your buyer may ask that you send a monthly status report detailing the status of a certain shipment. In this case, your buyer will create a deliverable called "Send Status Report," and assign the deliverable to you. You will see the "Send Status Report" deliverable in the notifications section of the **iSupplier Portal** home page, and can manage the deliverable from there, or through the **View Order Details** page. You may attach your status report to the deliverable and change the status of the deliverable.

To manage deliverables:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Select the PO number of the purchase order that includes deliverable(s) you would like to manage.

3. On the **View Order Details** page, click Manage Deliverables.

Figure 4–11   View Order Details page

4. On the **Manage Deliverables** page, click the pencil icon on the deliverable you would like to update.

5. Update and add attachments to the deliverable as necessary, and then change its status to Submitted.

Figure 4–12   Manage Deliverables page

6. Click Apply.

7. You will receive confirmation that your deliverable has been updated. Your buyer will also receive notification that the status of the deliverable has been updated.

Work Orders

Using work orders, buyers and suppliers can monitor outside processing from third parties whose Work In Process (WIP) status and delivery tracking information is critical to their supply chain process flow. Outside processing activities are the activities of the third-party suppliers who provide services needed to complete the final product or maintenance activity.

To view work orders, click the Orders tab, and then click Work Orders in the task bar directly below the tabs. Using the search criteria, you can view details of the orders, schedules, WIP details, operations instructions, components, and

component instructions by selecting the links provided. You can also reschedule an order.

Figure 4–13   Work Orders page

Agreements

Supplier agreements are purchase agreements you have made with the buying company. On the Supplier Agreements page, you can review the details of those agreements, and the corresponding releases (orders) that have been created for a particular agreement.

To view agreements, click the Orders tab, and then Agreements in the task bar directly below the tabs. Use the search criteria to get a summarized list of agreements. For each agreement, you can select to view the releases created to date for that agreement. You can export details from any page.

Figure 4–14   Blanket Agreement page

Purchase Order Revision History

The **Purchase Order Revision History** page enables you to search for details on the revision history of a purchase order.

Using the search criteria, you can get a summarized list of purchase orders that have been revised. You may choose to compare each revised PO to the original PO, the previous PO, or last signed PO (if the revised PO has been signed). You can also view all changes made to the PO.

Figure 4–15   Purchase Order Revision History page

Requests For Quotes (RFQ)

Viewing requests for quotes (RFQs) enables you to select possible negotiations to participate in with the buying company.

To view RFQs, click the Orders tab, and then click RFQ in the task bar directly below the tabs. The RFQ summary page provides the details of all RFQs created by the buying company in its ERP application. Click any of the links on the **RFQ Summary** page to get more details about the RFQ**.**

Figure 4–16   RFQ Summary Results page

Viewing Time Cards

To be paid for services rendered, contractors can record hours worked using timecards. You may access these time cards if the Timecards task appears under the Orders Tab. You will be able to view timecard information and check the amount of time confirmed by the hiring manager.

To view timecards, click the Orders tab, and then click Timecards in the task bar directly below the tabs. Use the search criteria to get a summarized list of timecards. Click View Timecard to get more details about the timecard. You can export details from any page.

Figure 4–17   Timecards page

5

Shipping Information

This chapter includes the following:

-
-
-

Shipping Information

Oracle iSupplier Portal enables you to view your existing shipments. Using your shipments you can create or cancel advance shipment notices. The system enables you to view other shipment information such as delivery schedules.

Using shipping features, you can alert the buyer to upcoming shipments and expedite receipts and payments for the buying company.

Shipping information details all of your shipping transactions on Oracle iSupplier Portal. You can create or cancel shipment notices as well as view shipment delivery schedules and overdue shipment receipts.

The shipping information section includes:

- Using Advance Shipment Notices and Advance Shipment Billing Notices on page 5-2
- Uploading Routing Requests on page 5-11
- Viewing Routing Responses on page 5-11
- Viewing Delivery Schedules on page 5-12
- Viewing Overdue Receipts on page 5-12

Using Advance Shipment Notices and Advance Shipment Billing Notices

When you enter an Advance Shipment Notice (ASN) or Advance Shipment Billing Notice (ASBN), you alert the buying company of upcoming shipment deliveries. To create an ASN or ASBN, select the purchase order shipments being shipped and provide the appropriate shipment details.

The details that can be specified on an ASN/ASBN include:

Shipment Lines

- Shipment Line Defaults:
    - Packing Slip
    - Country of Origin
    - Bar Code Label
    - Container Number
    - Truck Number
    - Comments

- Shipments in Advance Shipment Notices

    > **Note:** In the Shipments in Advance Shipment Notices section, to view Details, click Show. To hide details, click Hide.

Shipment Headers

- Shipment Information (Required fields are marked with *)

    - Shipment Number*

    - Shipment Date*

    - Expected Receipt Date*

- Freight Information

    - Freight Terms

    - Number of Containers

    - Freight Carrier

    - Waybill/Airbill Number

    - Bill of Lading

    - Packaging Code

    - Packing Slip

    - Tar Weight

    - Special Handling Code

    - Net Weight

    - Tar Weight UOM

    - Comments

    - Net Weight UOM

You can enter billing information on a shipment notice to create an ASBN. An ASBN creates an invoice in the buyer's payables system. To create an ASBN, in addition to the above details, the following billing details should be provided (Required fields are marked with *):

- Invoice Number*

- Invoice Amount*

- Invoice Date*

- Payment Terms

- Freight Amount

- Currency

- Tax Amount

- Remit To Site

The Advance Shipment Notices section includes:

- Creating Advance Shipment Notices and Advance Shipment Billing Notices on page 5-4

- Uploading Advance Shipment Notices and Advance Shipment Billing Notices on page 5-8

- Canceling Advance Shipment Notices and Advance Shipment Billing Notices on page 5-10

Creating Advance Shipment Notices and Advance Shipment Billing Notices

You can create advance shipment notices and advance shipment billing notices using PO shipment lines.

To create advance shipment notices and advance shipment billing notices:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. On the **Shipment Notices** page, click Create Advance Shipment Notices for an ASN or Create Advance Shipment Billing Notice for an ASBN.

> **Note:** If you are creating an ASBN, all selected shipments must belong to the same business unit.

Figure 5–1   Shipment Notices page

3. Select either View Shipments Due This Week or View Shipments Due Any Time, and then click Go. Click Advanced Search to enter additional search criteria.

4. Select one or multiple purchase order shipments, and then click Add to Shipment Notice.

Figure 5–2   Create Advance Shipment Notice page

5. On the **Create Advance Shipment Notice** or **Create Advance Shipment Billing Notice** page, enter the appropriate shipment line defaults.

> **Note:** You can always add more shipments by clicking Add Shipments on the **Shipments Line** page.

- You can enter the line details once for all shipment lines if the details are common to all lines. To copy all default shipment lines, click Default to All Lines.

- To split a shipment line, click the split icon in the Shipments in Advance Shipment Notice section, and enter Shipping Quantity for the original and new lines.

- To remove a shipment, click the remove icon in the Shipments in Advance Shipment Notice section.

> **Note:** To display shipment details, click Show in the Shipment and Advance Shipment Notice section. To hide shipment details, click Hide in the Shipment and Advance Shipment Notice section.

6. If you would like to enter Licence Plate Number (LPN), Lot, or Serial Information, click the LPN/LOT/serial icon.

You will be able to enter lot and serial information for shipment lines only when the item has been defined as a lot or serial controlled item. You will only be able to enter lot information if the item is lot controlled, serial information if the item is serial controlled, and both lot and serial information if your item is a lot and serial controlled.

Figure 5–3 LPN Details page

To enter details for a lot and serial controlled item:

a. Enter lot information. If you would like to add additional lot attributes, click the lot attributes icon.

b. If you would like to enter serial details for the lot, click Show, and then enter serial information. If you would like to add additional serial attributes, click the serial attributes icon.

c. If you have more than one lot or serial controlled item, click Add Another Row.

d. If you have LPNs nested within each other, enter nesting details in the License Plate Configuration Details section.

> **Note:** You may change the total shipment quantity on the **LPN/Lot/Serial Detail** page. The total shipment quantity entered should be equal to the total lot/serial quantity.

e. When you are finished entering your LPN/Lot/Serial details, click OK.

7. Click Shipment Headers. Enter the required ASN or ASBN information.

You can also enter other information. The information you enter at the header level is transferred to the line level. (However, changes you make at the line level override information at the header level).

If you are entering an ASBN, you must enter the following billing information:

■ Invoice number

■ Invoice date

■ Invoice amount

In the Remit-To site section, verify that the Remit To Site details are correct. If the Remit to Site details need to be changed, click Change, select the correct Remit To Site details, and then click Apply.

8. To preview the ASN or ASBN, click Preview.

9. Review the ASN or ASBN and click Submit.

Uploading Advance Shipment Notices and Advance Shipment Billing Notices

If you have a large volume of ASNs or ASBNs, you may create a spreadsheet containing shipment details and upload it into your buying company's system.

Using the spreadsheet template in iSupplier Portal, you can create shipment notices offline, and then upload the file.

To download instructions on how to upload ASN and ASBNs:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. On the **Select a Task** page, click Upload Advance Shipment and Billing Notices.

3. On the **Upload Advance Shipment and Billing Notices** page, click Download Template for instructions on uploading an ASN or ASBN.

Figure 5–4   Upload Advance Shipment Billing Notices page

Upload Advance Shipment and Billing Notices

If you need to download templates or instructions for creating the file click on Download Templates

Choose a File

* Indicates required field

* File name | ASN.htm | Browse...

☑ TIP The file should be a tab-delimited text file

Cancel   Start Load Now

4. On the **Download Templates** page, choose the file you want to download and click Download. You may choose from the following files to download:

   - ASN Template and Instructions - Contains instructions for uploading ASNs, a sample ASN spreadsheet file, and the template to use when entering ASN information offline.

   - ASBN Template and Instructions - Contains instructions for uploading ASBNs, a sample ASBN spreadsheet file, and the template to use when entering ASBN information offline.

   - Valid List of UOM, freight terms, etc.... - A list of values including country of origin, UOM, freight, carriers, payments terms, etc. is provided. You should use these values when creating your ASN/ASBN file.

   - Zip, All Files - Contains instructions for uploading ASNs, ASBNs, samples of ASN and ASBN spreadsheet files, templates to use while entering ASN and ASBN information offline, and lists of values.

Figure 5–5   Download Templates page

Download Templates

Choose the file you want to download and click on the Download button to save a .zip file to your system.

| Zip-All files | ▼ | Download |

ASN template and instructions
ASBN template and instructions
Valid list of values for UOM, Freight terms etc   nt notices
Zip-All files

•   ~~A Template file that can be opened and~~ ~~edit~~ ed in excel
•   Excel spreadsheet sample files illustrating how ASN/ASBN data can be uploaded
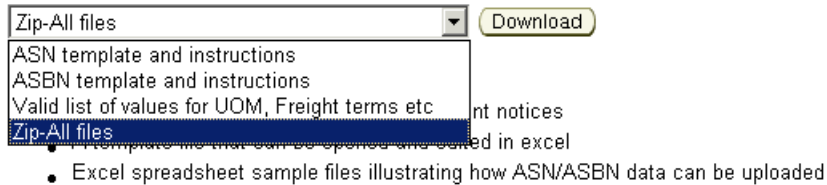
Canceling Advance Shipment Notices and Advance Shipment Billing Notices

When you cancel an ASN or ASBN, the system sends a notification to the buyer. You can always reenter an ASN for the same purchase order shipments at a later time. When you cancel an ASBN, both the shipment notice and corresponding invoice that was issued in the buyer's payable system are canceled.

To cancel a submitted advance shipment notice or advance shipment billing notice:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. On the **Select a Task** page, click View/Cancel Advance Shipment Notices.

3. On the **View/Cancel Advance Shipment Notices** page, search for and select the advance shipment notice you would like to cancel.

> **Note:**   You can use the advanced search feature to narrow your search.

4. Click Cancel Shipment Notice. A notification of your cancellation is sent to the buyer.

> **Important:** Canceling a shipment notice cannot be undone. An ASN cannot be canceled if any of the lines have been received by the buying company. You can cancel an ASBN if none of the lines has been received and the invoice has not been paid by the buying company.

Uploading Routing Requests

If your buying company is responsible for arranging the packing and shipping of materials, you may need to submit a routing request. A routing request notifies your buyer when goods are ready for shipment.   You may upload a routing request using a spreadsheet template.

To download instructions on how to upload a routing request:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. On the **Select a Task** page, click Create Routing Request.

3. Click Download Template.

The Readme file included in the download will provide instructions on how to upload your routing request.

Viewing Routing Responses

You may view buyer responses to your routing requests. On the **Routing Response** page, you may search for routing responses (after your buyer has responded to them). You may search using the following search criteria:

- Response Number
- Routing Number
- PO Number
- Ship-From
- Ship-To
- Pick Up Time

When you have found the routing response you would like to view, click the response number for details.

Viewing Delivery Schedules

You can use the **Delivery Schedules Results** page to quickly determine deliveries that need to be scheduled and deliveries that are past due. Click the purchase order number, receipt quantity, and ship-to location links to view further detail.

Figure 5–6   Delivery Schedules Results page

Viewing Overdue Receipts

The **Overdue Receipts Results** page enables you to view the details of past due purchase order shipments. Click the PO number, Ship-To Location, and Buyer to view further detail.

Figure 5–7   Overdue Receipts Results page

Receiving Information

Receiving information enables you to view your receipts, returns, and delivery performance.

The receiving information section includes:

- Viewing Receipts on page 5-13
- Viewing Returns on page 5-14
- Viewing On-Time Delivery Performance on page 5-15

Viewing Receipts

The **Receipts Transactions** page enables you to explore a historical view of all receipts that have been recorded for your shipped goods. Click Receipt Number and PO Number to view further detail.

Figure 5–8   Receipts Transactions page

Viewing Returns

The **Returns Summary** page enables you to view the return history, the causes for goods returned by the buying company, and inspection results of a shipment. The search summary results include basic information along with details about the return, such as quantities and a reason for return. Click Receipt Number and PO Number to view further detail.

Figure 5–9   Returns Summary page

Viewing On-Time Delivery Performance

The **On-Time Performance** page provides the delivery status of shipments you made against purchase orders. You can view your performance for timeliness of deliveries. Click the PO Number and Receipt Number to view further details.

Figure 5–10   On-Time Performance page

Quality Information

Entering quality information online enables paperless transactions for required quality standards. You can only enter quality information if the buying company has Oracle Quality and you have permission.

You first create a Quality Collection Plan in Oracle Quality and associate the plan with the Self-Service Quality for outside processing transactions. You enter quality information to communicate to your buyer if your item meets the quality standards required. For example, an electrical motor supplier performs a detailed electrical test on each motor. That supplier can enter the quality data gathered from each test and enter that information online in Oracle iSupplier Portal prior to shipping the motor. Quality engineers can evaluate the results and stop the shipment of any motors that do not meet the requirements.

The system displays an available link in the Quality Plans column. Clicking this link displays a list of collection plans associated with your purchase order. You can enter quality results, view quality results submitted, or view attachments for any purchase order listed.

The **Quality Shipments** page displays purchase order and shipping information for any purchased item being shipped, but only for open jobs that also have at least one collection plan assigned to them. You can obtain the shipment number, ship-to location, and ship-to organization. You can also download quality collection plans, and collect and submit quality data regarding your shipments.

To enter quality results:

1. On the Shipments tab, click Quality in the task bar directly below the tabs.

Figure 5–11   Search - Quality Shipments page

PO Number	PO Line	Shipment Number	Supplier Item	Item	Item Revision	Description	UOM	Quantity Ordered	Quality Plans
612	1	1		f20000		Paper - Purchased 2-way match office supply item	Each	326	Available
615	1	1		f20000		Paper - Purchased 2-way match office supply item	Each	188	Available

2. On the **Search - Quality Shipments** page, search for a shipment.

3. Click Available in the Quality Plans column for the appropriate shipment.

4. On the **Quality Plans** page, click the enter quality results icon. To view existing quality results, click the view quality results icon. To view attachments, click the attachment icon.

Figure 5–12   Quality Plans page

5. On the **Enter Test Results** page, enter a number and click Continue. (You can only complete this task if you have permission).

Figure 5–13   Enter Quality Results page

6. On the **Enter Quality Results** page, enter your quality information (the fields available to enter data vary depending on the type of information you need to enter) and click Submit. You can enter up to 25 rows of quality data at a time.

7. Once you have submitted all of the quality results, a notification is sent to the buyer.

To send quality notifications to the buyer or recipient:

After you have saved and submitted all of your quality results, click Notification to notify the buyer or recipient that you have submitted results (if you have permission). You can only submit 25 rows of results at a time. If you are submitting more than 25 rows of results, for example 100 rows of results, you must submit your results four times.

> **Note:**   To avoid sending duplicate notifications, click Notification only after you complete and submit all of your rows of data.

6

Planning and Inventory Information

Oracle iSupplier Portal enables you to view demand forecasts from the buying company. Using your item number, you can view different transactions. You can also maintain certain item information such as manufacturing and order modifiers. Oracle iSupplier Portal enables you to perform vendor managed inventory or track consigned inventory stock. You also can maintain your orders and capacity information on the system.

This chapter includes the following:

- Forecast Information on page 6-1
- Product Information on page 6-2
- Vendor Managed Inventory on page 6-11
- Consigned Inventory on page 6-12

Forecast Information

Forecast information enables you to view real-time forecasts from the buying company. You can view plans, arranged by schedules, that communicate expected demand over different time horizons. You can see all available schedules and select the schedule number to view further details. The Planning tab allows you to view plans that communicate forecast information. You can also view forecast schedules. A summary of schedules is displayed and you can select each schedule to view details. Click the Schedule Number for further information.

The **Planning Schedule Summary** page displays forecast information for all items. To view forecast information for all items on a single page, click the summarized view icon.

Figure 6–1   Planning Schedule Summary page

Product Information

Using the Product tab, you can easily access and view information about the products you provide sorted by item.

The product information section includes:

■   Viewing Supplier Item Summary on page 6-3

■   Viewing Item Inventory Information on page 6-4

■   Maintaining Capacity Information on page 6-6

■   Maintaining Order Modifiers on page 6-9

Viewing Supplier Item Summary

The **Supplier Items** page enables you to view all of the details of the products that you supply. You can view your search results in a summary format with links on each line for:

Figure 6–2   Supplier Items page

Orders A summary of order lines placed with you for this item. This summary includes quantity ordered, quantity received, and price break information. Click PO Number, Ship-To Location, and Buyer for further information.

Overdue A summary of overdue receipts for the selected item. Click PO Number and Receipt Number for further information.

Receipt History A summary of receipts for the selected item. Click PO Number and Receipt Number for further information.

Defects A summary view of failed inspection items.

Returns A summary view of returns for an item that includes shipment information, RMA number, and quantities. Click PO Number and Receipt Number for further information.

On-Time Performance A summary of receipts for an item that includes due dates, receipt dates, and shipping information. Click PO Number and Receipt Number for further information.

Inventory The **On-Hand** page provides more details about the item, on-hand quantity, and links to both. Revision history and sub-inventory breakdown of the on-hand quantity (with locator, lot, and serial).

Vendor Managed Inventory A summary view of vendor managed items that includes supplier, item shipment notice, and buyer information.

Consigned Inventory A summary view of consigned items including item, shipment, and transaction information. Click the appropriate icon for further information.

Most of the summaries are available to export.

Viewing Item Inventory Information

The **On-Hand Items** page enables you to view your item inventory information. Viewing your item inventories enables you to view on-hand inventories, item locations, lots, and serials.

To view item inventory information:

1. Click the Product tab, click Supplier Item in the task bar directly below the tabs.

2. Search for an item.

3. On the **Supplier Items Result** page, select your item and click the inventory icon.

4. Click Revision to view any revisions made to an item.

Figure 6–3   On-Hand Items page

5.   Click the Subinventory icon to view subinventory information for an item.

6.   Click the Locator, Lot, or Serial icon to view any specific item information.

Figure 6–4   On-Hand items Subinventories page

7.   Click Export to download your inventory information.

Maintaining Capacity Information

You can accurately maintain your delivery capacity online. Your buying company can allocate planned orders taking into account your changes to the capacity constraints. This provides more accuracy and flexibility in making sourcing allocations during the organization's planning, scheduling, and procurement processes.

You can update your capacity abilities for various items for which you are an approved supplier. You can use the **Order Modifiers** page to define processing lead times, fixed lot multiples, and minimum order quantities. You can also define tolerance fences by Days in Advance and Tolerance on the **Maintain Capacity** page. Once your updates are submitted, the company's buyer is notified and their approved supplier list is updated with your information. The company can then better allocate planned orders taking allocation and current capacities into account.

You can update the following capacity constraints for each item that has been sourced to you:

- Processing lead time

- Order modifiers: minimum order quantity and fixed lot multiple

- Capacity per day for a range of effective date

- Tolerance fences: tolerance percentage and days in advance

After you change capacity information, a notification is sent to the planner and the buyer. Based on the preference set by the buying company, the information may go through an approval from a buyer or planner. You will be notified of the status of the request.

To maintain capacity information:

1. Click the Product tab, click Maintain Capacity in the task bar directly below the tabs.

2. On the **Maintain Capacity** page, enter search criteria information.

Figure 6–5   Maintain Capacity page

3. Click Search. (You can perform a blind search by clicking Search without entering any criteria. This results in all items assigned to you being displayed).

4. Select your item and click Maintain Capacity.

Figure 6–6   Capacity of Item page

> **Note:**   The **Maintain Capacity** page displays information from
> today's date forward. You can modify the current defined capacity
> or create new entries by clicking Add Another Row.

5. You can also add or modify the Over Capacity Tolerance by changing existing
    Days in Advance and Tolerance values.

> **Note:**   To add additional Over Capacity Tolerance information,
> click Add Another Row.

6. When you have completed your update, click Update Capacity. An Update
    Capacity Confirmation message is displayed.

Maintaining Order Modifiers

Maintaining order modifiers enables you to view and make changes to the details of your ability to fulfill purchase orders scheduled for delivery. You can view shipment processing lead times, minimum order quantities, and fixed lot multiples. You can then adjust these to fit your delivery ability.

To maintain order modifiers:

1. Click the Product tab, click Order Modifiers in the task bar directly below the tabs.

2. On the **Order Modifiers** page, enter search criteria information and click Go.

Figure 6–7 Order Modifiers page

3. Select your item and click Maintain Order Modifiers.

Figure 6–8   Order Modifiers for Item page

4. On the **Order Modifiers for Item** page, you can add or modify the following item attribute values:

   – Processing Lead Time (in days)

   – Minimum Order Quantity

   – Fixed Lot Multiple

5. Click Submit.

The item is immediately updated with the changes and an information notification is sent to the planning manager or buyer of the item. They can verify your changes in their approved supplier list.

> **Note:** You can erase any changes before submitting your request by clicking Cancel.

Vendor Managed Inventory

Vendor Managed Inventory enables you to manage the inventory at the customer's location. Customers can set up the minimum and maximum stock levels required for an item enabled for maintenance by a supplier.

Using Oracle iSupplier Portal, you can view these minimum and maximum levels and also view the current on-hand quantities for that item at the customer location. You have the option of triggering the replenishment requests from this page to ensure that the stock quantity is maintained at the customer location.

On the Product tab, on the **Supplier Item Results** page, click the VMI icon. From the **Vendor Managed Inventory Status** page, your search results are displayed with detailed information about the status of each item you included in your search and links to enter replenishment information. You then initiate replenishment requests for the item.

> **Note:** You can save searches that you use frequently by clicking Personalize, entering your search criteria, and then saving by clicking Apply. Personalize also enables you to customize the information that is displayed when you view the **VMI Search** page.

To generate supply requests:

1. Search for the items you are responsible for.

2. Review the replenishment method for the item.

3. If the method for the item is Buyer or Supplier Initiates Release; you then select the item, enter the quantity, and click Release.

4. If the method for the item is Manual Requisition; you click the enter requisition icon in the Create Requisition column. On the **Enter Order Details** page, enter a quantity, need-by date, and other details of the order as required by the customer.

Once you have completed and submitted the replenishment request, you will receive a confirmation message that contains the request identifier. You can use the request identifier to monitor the progress of your request.

You can override the quantity with either of the manual types of replenishment methods. For Automatic Release method items, you can click the enter replenishment icon in the Create Requisition column and enter a quantity.

Consigned Inventory

Oracle Procurement along with Discrete Manufacturing supports maintaining consigned inventory for an item. Buying companies can enable items to have consigned inventory. This enables you to maintain the stock at the buying company location. Buying companies do not incur financial liabilities until they start consuming the stock.

Oracle iSupplier Portal enables you to view on-hand stock for consigned items and also associated procure-to-pay transactions.

To view consigned items:

1. Click the Product tab, and then click Consigned Inventory in the task bar directly below the tabs.

2. On the **Consigned Inventory** page, search and select your item.

3. For a given item, suppliers can view the following information:

   – Supplier Item

   – Item

   – Item Description

   – Consigned On-Hand - Displays the on-hand stock levels for the item at the buying company.

   – Consigned Shipments - Displays the purchase order shipment details that enable the item to be shipped from you to the buying company location.

   – Consumption Orders - Displays the purchase orders/blanket releases that are created when consigned stock is consumed by the buying company. These are the orders against which you can submit invoices to the buying company.

   – Consigned Receipts - Displays the history of receipts for consigned stock.

   – Consigned Returns - Displays the history of return transactions created for the consigned stock.

   – Material Transactions - Displays the material transactions that occurred for the consigned item. It includes transactions to procure the item, which is the consigned stock, and then the transactions to move the stock to regular inventory for consumption.

If the consigned item is also enabled for Vendor Managed Inventory, suppliers can initiate replenishment requests online.

To view consigned inventory aging items:

1. Click the Product tab, and then click Consigned Inventory Aging in the task bar directly below the tabs.

2. On the **Consigned Inventory Aging** page, you may search for items that are past due, or items that are due in the next 7, 15, or 30 days. Select the appropriate search criteria for your item and click Go.

3. For a given item, suppliers can view the following information:

   – Supplier Site

   – Organization

   – Supplier Item

   – Item

   – Item Revision

   – Item Description

   – Subinventory

   – UOM

   – Quantity

   – Receipt Date

   – Consume Before - Date the item must be consumed.

   – Days Before Consumption is Due - Displays the number of days before the ownership of the item is transferred.

7

Invoice and Payment Information

You can access invoice and payment information as well as review invoice status online using Oracle iSupplier Portal. If the buying company uses Oracle Payables, you can also submit invoices online.

This chapter includes the following:

Submitting Invoices

If your buying company has implemented Oracle Payables, you may submit invoices online.

You can submit an invoice online to the buying company based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard, or blanket purchase orders that are not fully billed. You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders. However, the currency and organization of all items on an invoice must be the same. The organization is the entity within the buyer's company that you are invoicing.

You can also partially complete an invoice, save it, and submit it later.

After you submit an invoice, you cannot change the invoice. If you need to make adjustments to a submitted invoice, you can create a credit memo against the same purchase order items to net out the invoice charges. The purchase order will then be available for a new invoice.

To submit an invoice:

1. Click the Account tab, and then click Create Invoices in the task bar directly below the tabs.

2. On the **Create Invoice: Submit Invoices** page, click Create Invoice.

Figure 7–1   Create Invoice: Submit Invoices page
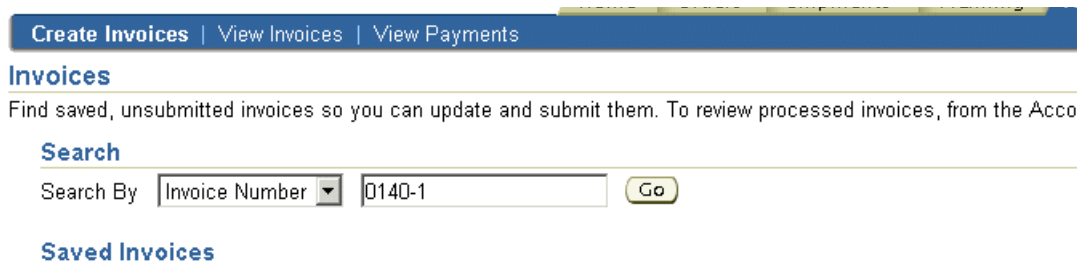
3. On the **Create Invoice: Select Purchase Order** page, enter search criteria and click Go.

Figure 7–2 Create Invoice: Select Purchase Order page

4. Select items to be invoiced and click Add Items to Invoice List. Add as many items as you need (items on your invoice display at the bottom of the page).

5. When finished adding items, click Next.

> **Note:** After you select your items, click Taxable to indicate an item is subject to tax. Freight and miscellaneous lines cannot be taxable.

6. On the **Create Invoice: Include Lines on Invoice** page, enter a quantity to invoice. If you would like the invoice to be taxable, select Taxable. Enter and any additional charges, and then click Next.

Figure 7–3   Create Invoice: Include Lines on Invoice page

> **Note:**   If you want to verify the total amount, on the **Create Invoice: Include Lines on Invoice** page, click Calculate and your totals are updated.

7. On the **Create Invoice: General Invoice Information** page, enter an invoice number, invoice date, and a description.

8. Click Next.

9. On the **Create Invoice: Review the Invoice** page, review your invoice and click Submit. You also have the option to return to this invoice later by clicking Save for Later.

10. On the **Warning** page, click Yes to confirm your invoice. After you confirm your invoice, a notification is sent to the Accounts Payable department.

To retrieve a saved invoice:

1. On the **Submit Invoices** page, search and select your saved invoice.

2. Complete the invoice and click Submit.

Viewing Invoice Information

The **Invoice Summary Results** page enables you to view the history of all your invoices by the buying company. You can search using various search criteria such as:

■   Invoice Number

■   Invoice date

■   Due date

■   Payment status

You can select and view further purchase order details. The system displays a list of all purchase orders that are included on the invoice. You can also select and view payment details, as well as view invoice attachments.   To view invoice attachments, click the attachment icon.

Figure 7–4   Invoice Summary Results page

> **Note:**   If you submitted your invoice online, there may be a delay
> before you can review it because the Accounts Payable department
> needs to process it first.

Viewing Payment Information

Payment inquiry enables you to view the history of all the payments to your
invoices completed by the buying company. You can search using various search
criteria, including:

- Payment number

- Payment date

- Purchase order number

- Packing slip identifier

Figure 7–5   Payment Summary Results page

You can view further payment or invoice details:

Payments - Select a payment link and the **Payment Detail** page displays and enables you to view the details of the payment or select the invoices included in the payment.

Invoices - Select an invoice link and the **Payments** page displays. There can be one or more invoice lines in the list depending on how many invoices were included in the payment. If you then select a specific invoice, the **Invoice Summary** page displays the details of that particular invoice.

8

Supplier Profile Management

Supplier Profile Management enables you to manage key profile details used to establish or maintain a business relationship with the buying company. This profile information includes address information, names of main contacts, business classifications, banking details, and category information about the goods and services you are able to provide to the buyer. Buyer administrators will review the details you provide and use them to update the appropriate records in the buyer's purchasing transaction system.

You benefit from managing your profile yourself. Supplier Profile Management enables you to effectively represent yourself to the buying company and update your profiles details as necessary, making important information accurate.

This chapter includes the following:

- Supplier Profile Management Flow on page 8-2
- Supplier Details on page 8-2
- Address Book on page 8-3
- Contact Directory on page 8-4
- Business Classifications on page 8-7
- Products and Services on page 8-8
- User Accounts on page 8-12

Supplier Profile Management Flow

To have the information you enter in Supplier Profile Management processed in the system, log into the Oracle iSupplier Portal and access your profile. You can then enter information for your address book, contact directory, business classifications, products and services, or user accounts. The buyer administrator will review any changes to your profile and use this information to update their purchasing system.

Supplier Details

The **Supplier Details** page is the introductory page to Supplier Profile Management. From this page, you can add to or change your profile information. You can also add an attachment to your profile. Adding attachments allows you to upload documents pertinent to your relationship with the buying company or upload documents that may have been specifically requested by the buying company (for example, tax documents).

Figure 8–1 Supplier Details page

Address Book

Using Supplier Profile Management, you can enter profile details such as address book information online. You can create and modify the multiple addresses used in transactions with the buying company (for example, purchasing locations, payment sites, and addresses for RFQs). You can provide a comment for each address entry to describe how it is used. For example, you can enter an address record and indicate that this is an address for a location from which goods or services may be purchased. You can inactivate addresses that are obsolete, as well as view and update bank account details associated with each address.

After you enter address information, buyer administrators are notified of the changes. Buyer administrators must review the updates and decide how to use the details to update the purchasing system. Therefore, any changes you make may not be promoted to the system for a few days.

To manage address book details:

1. On the **Supplier Details** page, click Address Book. You can select from a current list of addresses.

2. On the **Manage Address Book Details** page, click Add.

Figure 8–2   Manage Address Book Details page

3. On the **Add Address** page, complete the required fields.

4. Click Apply.

To edit or remove addresses:

1. On the **Manage Address Book Details** page, click either the edit or remove icon.

2. Click Apply.

Contact Directory

You can enter contact directory information online. You can create and modify information about the multiple contacts in your organization who interact with the buying company (for example, people who respond to RFQs or involved in selling the company's goods and services). After entering the contact details, you can link the contacts to the appropriate address (described below). As people move within your organization, you can also revise the address details for a contact. You can create multiple contacts and link each one to as many addresses as needed. Each

contact must be unique based on first name, last name, and phone number. Contacts that are obsolete can be removed.

After you enter the information, buyer administrators are notified so they can review the details and use then to update their purchasing system.   Therefore, your changes may not be promoted to the purchasing system for a few days.

To add a contact:

1.   On the **Supplier Details** page, click Contact Directory. The system displays your current list of contacts.

2.   On the **Contact Directory** page, click Add.

Figure 8–3   Contact Directory Details page

3.   On the **Add Contact** page, complete the required fields.

4.   Click Apply.

To link a contact to an address:

1.   On the **Contact Directory** page, click the manage address details icon for the contact you would like to link.

2. On the **Manage Address Details** page, select Addresses available to be linked to the contact.

Figure 8–4   Manage Address Details page

3. Enter any address information to narrow your search, and click Go.

4. Select the address or addresses to be linked to the contact and click Add Link to Contact.

To edit contact details:

1. On the **Contact Directory** page, click the edit icon.

2. Make appropriate edits, and then click Apply.

To remove contact details:

1. On the **Contact Directory** page, click the remove icon.

2. You will receive confirmation that your contact has been removed.

Business Classifications

Buying companies establish a list of business classifications they want to use to classify their supply base. In some regions, these classifications are required by government regulations.

You can claim classifications that are appropriate to your business and add any required classification details. Buyers can then audit your qualifications. Once you claim the appropriate classifications, buyer administrators are notified so they can review the details.

To claim business classifications:

1. On the **Supplier Details** page, click Business Classifications.

2. On the **Business Classifications** page, check Applicable for all classifications that apply to your company.

Figure 8–5   Business Classifications page

3. Complete the remaining fields.

4. If youwould like to undo any changes you have made before saving your information, click Revert.

5. Click Save.

Products and Services

Buying companies define product and service category sets that they use to categorize their supply base. You can browse the list of goods and services and select all those that apply to your business. Buying companies can then use this information; some may use it to help generate supplier invitation lists for RFQs or for reporting.

You can browse the hierarchy tree and select a parent category or child categories. When a parent is selected, the buying company assumes that you can provide all the products or services in that category. After you select the product and services categories that apply to your business, buyer administrators are notified so they can review the details. You can update your selections at any time.

To claim products and services:

1. On the **Supplier Details** page, click Product and Services.

2. On the **Products and Services** page, the system displays the list of categories that have already been claimed by your company. (To browse child category details for any parent, click the view sub-category icon.)

3. Click Add.

4. On the **Add Products and Services** page, browse for a product or service and click Applicable. (Applicable is greyed out for any previously selected products or services are already selected as Applicable.)

Figure 8–6   Products and Services page

Note: To view sub-category information about a product or service, click the view sub-categories icon. On the **Add Products and Services** page, click Applicable to apply a particular sub-category, and then click Apply.

Figure 8–7   Add Products and Services page

5. Click Apply.

To remove products or services:

1. On the **Products and Services** page, select a product or service.

2. Click Remove.

Banking Details

To simplify the process of capturing bank account related details and to improve data quality, you can create and maintain your own bank account details and assign these accounts to multiple addresses within your company. Buying companies can then access and approve these details for propagation into their payables systems.

You can create and maintain bank account details that you want the buying company to use when they make payments to you. The system captures all relevant information. Since bank accounts are defined for a particular bank, branch and account number, you have the ability to enter all this information when creating your account entries. When you enter your account information, the system validates for duplicate entries.

Creating Banking Details

To create a new bank account entry:

1. From the Supplier Details page, click Bank Accounts. The **Bank Accounts** page displays information on any bank accounts already defined for your company.

   - The **Bank Accounts** page displays a shortened form of account information. To see all address assignments for a particular bank account, click the Show link at the beginning of the line for the account. This opens the full display. Your bank account entry will not be completed unless you provide address assignments for each bank account.

   - You can edit bank account information by clicking the pencil icon. This takes you to the **Edit Bank Account** page.

   - You can remove the bank account by clicking the garbage icon at the end of the line.

2. To create a new bank account, click Add New. On the **Add Bank Account** page, enter required information and any additional information. After you add an account, if the buying organization already has details for the bank, branch, or account you have entered, you will be asked to confirm your account details. If any details are missing, you will be asked for additional information.

Figure 8–8   Add Bank Account page

3. Assign which company addresses can use the account. You can associate the address with all company addresses. You can pick a particular company address to associate with the account. Or you can model the new account off an existing account by clicking Copy from Another Account.When you have finished associating your addresses with your accounts, click Apply.

4. If the bank or branch details you provide are new to the system, you will be asked to provide some additional details. Otherwise, you will see the **Confirmation** page for the account you are setting up. Once you have confirmed the bank account status, your account will be listed with a new status.

5. Once the buying company has your bank information, they will verify the details you have provided. After your bank account details are validated, your account status is changed to Approved. If there is any problem with the account details, the status will change to Verification Failed, and you will need to check and re-submit your bank account details.

User Accounts

You can view information regarding users that can access the Oracle iSupplier Portal application on behalf of your company on the **User Accounts** page. Viewing user accounts is helpful for you to track which suppliers are no longer with the company.

Figure 8–9   User Accounts Page

9

Buying Company View

Buying Company View

The buying company view provides the same easy to use view of procure-to-pay transactions as the supplier view. Using the Internal User View responsibility in Oracle iSupplier Portal, your buying company can view order, shipment, receipt, invoice, and payment information. They can also search for information across all suppliers, as well as respond to supplier change requests.

This chapter includes information for buying companies using Oracle iSupplier Portal, and includes the following:

- Using the Oracle iSupplier Portal Home Page with the Buying Company View on page 9-1

- Order Information on page 9-3

- Shipment Information on page 9-9

- Account Information on page 9-11

Using the Oracle iSupplier Portal Home Page with the Buying Company View

When you access the Oracle iSupplier Portal application using the Internal User View responsibility, the **Oracle iSupplier Portal** home page displays.

Figure 9–1   Oracle iSupplier Portal home page

This page provides the following information:

Global buttons The following buttons display on the home page and all Oracle iSupplier Portal pages:

- Home - Returns you to the main portal where you can select another responsibility or application

- Logout

- Preferences - Displays the **Preferences** page

- Help

- Personalize Page - If this button appears, you may choose personalization context for your system

Tabs Oracle iSupplier Portal provides tabs for easy navigation. For example, if you want to view of a purchase order, start by clicking the Orders tab, and then click an order type in the task bar directly below the tabs.

Quick Links This section displays direct links to various functionality in the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.

Notifications To view notifications, click the linked subject. Notifications are messages that you may respond to. For example, a supplier may have submitted a change request and is waiting for you to respond to (accept) it.

Orders at a Glance To view your most recent orders, click a purchase order number.

Pending Change Requests To respond to supplier change requests, click a purchase order number.

Order Information

Purchase Orders

The **Purchase Order**s page enables you to view and search for purchase orders.

Figure 9–2   Purchase Orders page

Some examples of fields for you to enter search criteria include:

- Business Unit
- PO Number
- Order Date
- Supplier
- Supplier Site
- Buyer

You must enter a minimum search criteria to display search results. Minimum search criteria for purchase orders include business unit and PO number or supplier.

Using advanced search, you can build and narrow searches with the available search operators. Search operators enable you to specify the matching conditions for a search. Available search operators include:

- is - Use this operator for an exact match.

> **Note:** This advanced search explanation applies to all search screens mentioned in this chapter.

Once your search criteria is displayed, you may view details of purchase orders in the purchase orders list.

If you would like to export data regarding purchase orders, click Export.

Agreements

The **Supplier Agreements** page enables you to view and search for supplier agreement details.

You may search for details on supplier agreements using the following search criteria:

- Business Unit
- PO Number
- Supplier
- Supplier Site
- Global
- Effective From Date
- Effective To Date
- Status

You must enter a minimum search criteria to display search results. Minimum search criteria for agreements include business unit and PO number or supplier.

You may view details of supplier agreements in the search results list.

If you would like to export data regarding supplier agreements, click Export.

Figure 9–3   Supplier Agreements page

Purchase History

The **Purchase Order Revision History** page enables you to view and search for purchase history details.

You may search for details on purchase order revision histories using the following search criteria:

- Business Unit

- PO Number

- Release Number

- Supplier

- Revision

- Supplier Site

- Document Type

- Creation Date

- Revised Date

You must enter a minimum search criteria to display search results. Minimum search criteria for purchase history includes business unit and PO number or supplier.

You may view details of purchase order revision histories in the search results list.

If you would like to export data regarding purchase order revision histories, click Export.

Figure 9–4   Purchase Order Revision HIstory page

Pending Changes

The **Manage Change Requests** page enables you to search for change requests pending response, rejected orders and shipments, as well as respond to supplier change requests.

To search for information on supplier change requests, select what information you would like to search for and click Go.

Responding to Change Requests

To respond to supplier change requests:

1. Select the PO Number of the purchase order you would like to respond to and click Respond to Changes.

2. On the **Respond to Change Request** page**,** enter your response to the change request and the reason for your response in the PO Details section.

Note: In the PO Details section, to view more PO details, click Show. To hide PO details, click Hide.

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3. Click Submit.

4. You will receive confirmation that your response to changes has been submitted.

Figure 9–5   Respond to Change Request page

Responding to Additional Change Requests

Your supplier may have requested additional change requests. If so, you will see a section called Response to Additional Changes on the **Respond to Change Request** page.

The additional change requests are listed for you to review. Review the additional change requests and select your response, and then click Submit.

The buyer will be provided with the option to modify the PO based on their response to the additional change request.

Figure 9–6 Respond to Change Request page

Response to Additional Changes

Following are some additional changes that have been requested. Please review and select an appropriate response.

Important: Please note your response to additional changes will be recorded only if there are no pending change requests on this Order after you submit your response

along with new item

○ Reviewed. No Changes Required.
○ Reviewed. Document will be modified.
○ Reviewed. Changes Rejected.

Shipment Information

Shipment Notices

On the **View Advance Shipment Notices** page, you may search for details on advance shipment notices using the following search criteria:

■   Shipment Number

■   Supplier

■   Supplier Site

You must enter a minimum search criteria to display search results. Minimum search criteria for shipment notices include shipment number or supplier.

You may view details of shipment notices in the search results list.

If you would like to export data regarding shipment notices, click Export.

Figure 9–7   View Advance Shipment Notices page

Receipts

On the **Receipt Transactions** page, you may search for details on receipt transactions using the following search criteria:

- Organization
- Supplier
- Supplier Site
- Receipt Number
- Receipt Date
- PO Number
- Item
- Supplier Item
- Receipt Location

You must enter a minimum search criteria to display search results. Minimum search criteria for receipts include receipt or supplier.

You may view details of receipt transactions in the search results list.

If you would like to export data regarding receipt transactions, click Export.

Figure 9–8   Receipt Transactions page

Account Information

Invoices

On the **View Invoices** page, you may search for details on invoices using the following search criteria:

- Invoice

- Supplier
- Supplier Site
- Invoice Date
- PO Number
- Payment
- Packing Slip
- Payment Status
- Business Unit
- Gross Amount
- Invoice Date
- Amount Due
- Due Date

You must enter a minimum search criteria to display search results. Minimum search criteria for invoices include invoice number or supplier.

You may view details of invoices in the search results list.

If you would like to export data regarding invoices, click Export.

Figure 9–9   View Invoices page

Payments

On the **View Payments** page, you may search for payment summaries using the following search criteria:

- Payment
- Supplier
- Supplier Site
- Payment Date
- PO Number
- Packing Slip
- Business Unit
- Payment Amount
- Payment Date

You must enter a minimum search criteria to display search results. Minimum search criteria for payments include payment number or supplier.

You may view payment details in the search results list.

If you would like to export data regarding payments, click Export.

Figure 9–10   View Payments page

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