Oracle® iSupplier Portal

User's Guide

Release 11i

Part No. B10977-01

August 2003

ORACLE®

Oracle iSupplier Portal User’s Guide, Release 11i

Part No. B10977-01

Primary Author: Linda Rodish

Contributing Authors: Shilpa Kotwal, Harsh Vadlamudi, Mark Peachey, Dawn Abraham, Noah Eisner, Catherine Bauer

Contents

4 Order Information

5 Shipping Information

6 Planning and Inventory Information

7 Invoice and Payment Information

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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 suppliers need 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

Getting Started with Oracle iSupplier Portal

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

This chapter includes how you get started using Oracle iSupplier Portal, and includes the following topics:

Introduction to Oracle iSupplier Portal

Oracle iSupplier Portal is a collaborative application that enables buying companies and their suppliers to communicate with each other. Oracle iSupplier Portal 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, shipment notices, and planning details.

Note: Oracle iSupplier Portal supports both transaction documents and view-only documents. You can respond to or initiate transaction documents, such as purchase orders or change requests. You cannot respond to or update view-only documents, such as 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, manufacuring orders, supplier agreements, and requests for quotes.

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 enter information about your company using the Supplier Profile Management feature.

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 to exchange supply information with the buying company. 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:

Table 1–1 Order Tasks

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 requests to change purchase orders.	See Order Information
View an audit trail of any revisions for a purchase order.	See Order Information
Alert the buying company of any upcoming deliveries by sending advance shipment notices (ASN) or advance shipment billing notices (ASBN).	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 your current purchase agreements (if any) with the buying company.	See Order Information

Table 1–2 Invoice and Payment Tasks

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

Tasks	Where Documented
View receipts, returns, and delivery performance.	See Shipping Information
View invoices and received payments.	See Invoice and Payment Information
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

Table 1–3 Manufacturing Order Task

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

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

Table 1–4 Inventory Tasks

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

Table 1–5 Forecasting Task

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

Table 1–6 Profile Management Task

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

Table 1–7 Negotiation Task

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

2 Registration

You register your company to let the buying company know you are interested in establishing a business relationship. Registering to use Oracle iSupplier Portal involves registering your company as a supplier to the buying company. After you register your company or if you company is already registered with the buying company, you then register users within your company to access and use Oracle iSupplier Portal. Registering to use Oracle iSupplier Portal enables you to communicate, to a buying company, real-time information about your procure-to-pay transactions.

Note: If you are already registered with the buying company, you do not need to register again. You only need to register users for account access to Oracle iSupplier Portal. If your company is not registered with the buying company you need to register your company and then register your users.

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

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, you must first register your company. After your company is registered with the buying company, you can add supplier user accounts for your employees. If you company is registered with the buying company, you only need to add supplier user accounts, see the Registering Users task.

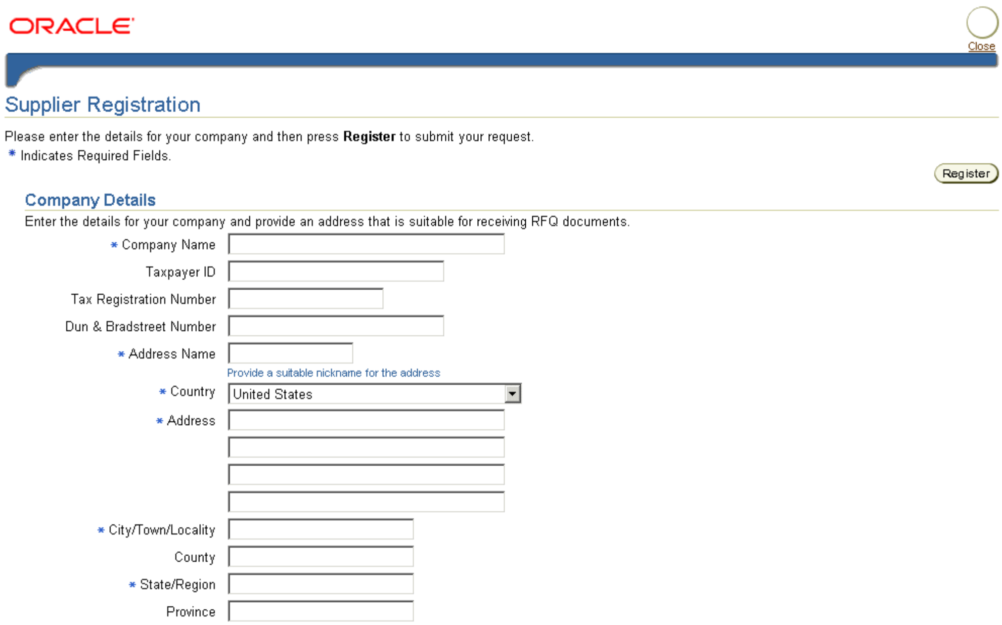
If you have received an e-mail invitation to register or an e-mail notification with your login and password and can access Oracle iSupplier Portal, then your company is already registered and you can skip this section.

Self-service supplier 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.

Based on information you supply, the buying company might engage a procure-to-pay cycle with your company.

Example 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 by an administrator within the buying company.

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

If your company is already registered with the buying company, you only need to add supplier user accounts to Oracle iSupplier Portal. Each supplier user must have a user account. The buying company initiates the process 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, a Vice President of Sales receives an invitation from the buying company; 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.

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

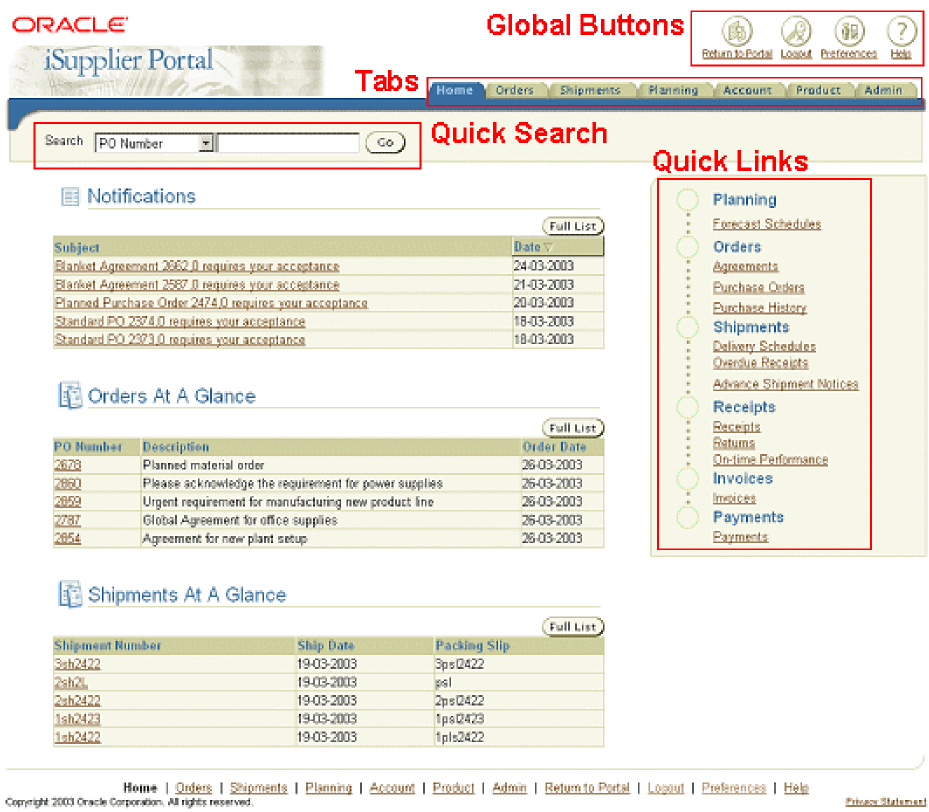
This chapter includes information to help you learn how to navigate and search in Oracle iSupplier Portal. After you learn the basic techniques, you can easily find information on your transaction information, and respond accordingly.

This chapter includes the following information:

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.

Example 3–1 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. See Setting Up User Preferences on page 3-4.
- Help

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

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

- Purchase orders
- Shipments
- Invoices
- Payments

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 Some notifications you only view, while other notifications require action. To view your notifications, click the linked subject. Notifications are messages waiting for your review. For example, an order may be waiting for you to acknowledge (accept) it. This shows in your list of notifications as PO Number 123 requires your acceptance. Click the subject line link and the **Notification Details** page opens. This page provides additional details about the order, as well as action buttons (Accept or Reject).

After you select an action, the Notifications 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 To view your most recent orders, click a purchase order number.

Shipments at a Glance To view a list of your recent shipments, click a shipment number.

Setting Up User Preferences

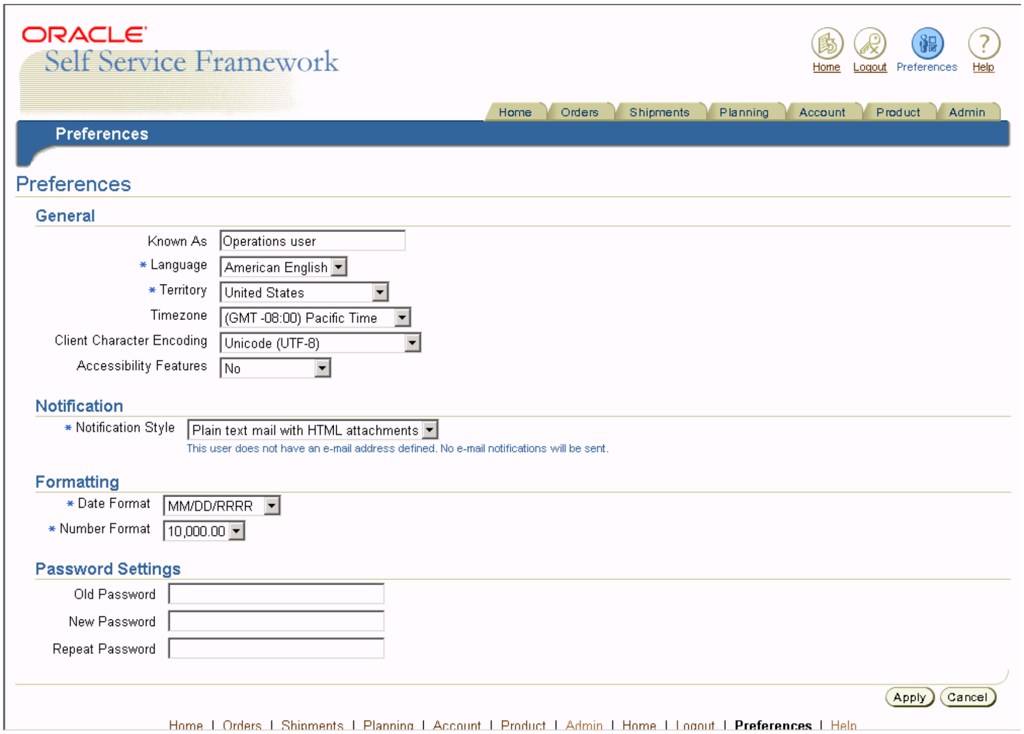
You can change your user settings or preferences at any time using the Preferences icon. You can change the following preferences:

- General - You can define your language, territory, time zone, client character encoding, and accessibility features.
- Notification - You can define how you want to receive your notifications.
- Date - 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.

Example 3–2 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 schedule number, revision (of the document), schedule type (such as on-time or delayed), forecast/release type, schedule horizon start and end date (the allowable date parameters for a shipment), supplier item number, buyer item number, and item description.

You can sort the results to find specific information. Some common sort criteria are receipt number, purchase order number, shipment number, returned material authorization (RMA) number, receipt date description, quantity, item description, unit of measure (UOM) item, and supplier item.

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.
- end 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

Using Oracle iSupplier Portal, you can view the purchase order flow while communicating information to the buying company. The real-time data provided online enables you to communicate procure-to-pay information with the buying company.

Using purchase order information you can acknowledge purchase orders, make change requests to purchase orders, split shipments, or cancel orders. You can also view manufacturing orders, supplier agreements, and requests for quotes. These viewable transactions enable you to view the rest of your procure-to-pay transactions.

This chapter includes the following:

Purchase Orders

The **Purchase Order** page enables you to view details of the entire purchase order. Oracle iSupplier Portal enables you to view your purchase orders throughout the procure-to-pay flow. You can make any adjustment to your purchase orders.

You can view details such as terms and conditions, lines, shipments, and attachments. When you navigate to this page, the most recent 25 purchase orders are displayed. Alternatively, you can view all orders that require acknowledgment or all orders that exist with the supplier. An advanced search is available to define your search even further. You also have the option to export the displayed data.

To view purchase order header and line details, click the purchase order number. On the **Order Detail** page, you can view the order and shipment details. You can also view receipts, invoices, and payments related to the selected order.

In addition to viewing purchase order details, you can submit acknowledgments to orders for which a buyer has requested acknowledgment. You can also submit change and cancellation requests for an order. You can view the change history and responses for each requested order.

The purchase order section includes:

- Acknowledging Purchase Orders on page 4-2
- Submitting Change Requests on page 4-4

Acknowledging Purchase Orders

You acknowledge purchase orders to communicate to the buying company you have receive their purchase order. You can also communicate any changes, such as shipment delivery dates.

When creating a purchase order, buying companies can request acknowledgment of the purchase order. If so, the purchase order includes a date by which you need to acknowledge it. You will receive a notification requiring your response. You can either acknowledge the order, or accept or reject the entire order using the notification. The purchase order is automatically updated with your response and a notice is sent to the buyer.

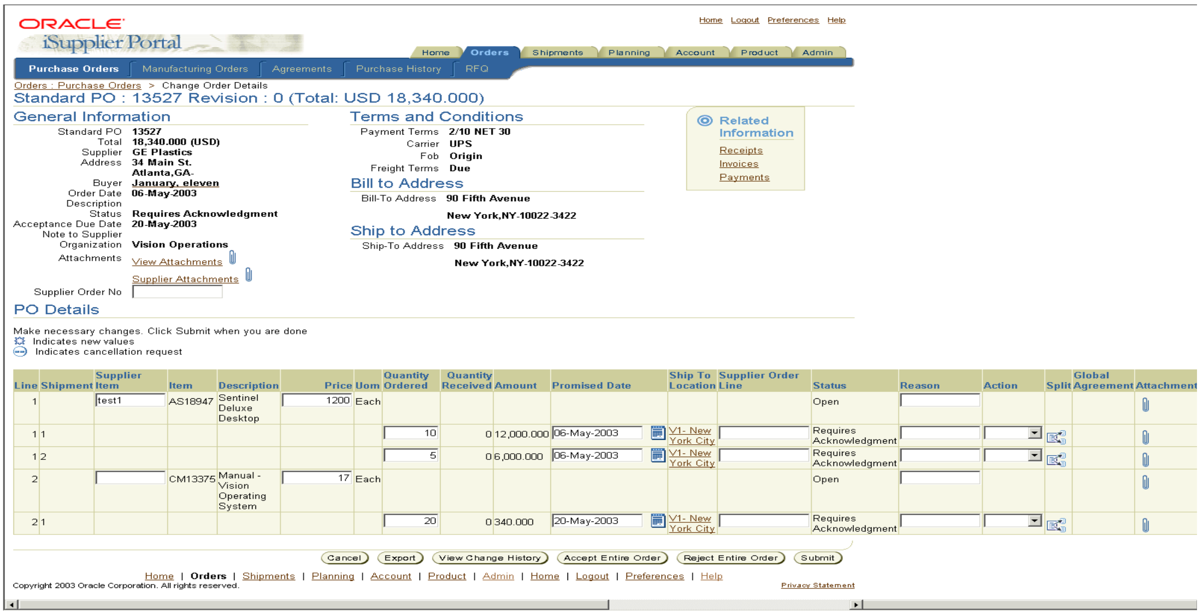
Alternatively, the Notification section of the home page displays any purchase orders requiring your acknowledgment. You can click the purchase order and then use the **Purchase Orders** page to verify that you have agreed to and accepted the terms on the standard purchase orders, purchase agreements, and releases sent to you. This feature enables you to view the details of the purchase order and provide online acknowledgment or acceptance of that purchase order.

You can submit acknowledgments for an entire order or for individual shipments. For example, if you can only fulfill 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. Enter purchase order search criteria. You can use the simple or advanced search to display purchase orders.
3. Click Search.
4. Select your purchase order number and click Acknowledge.
5. On the **PO Details** page, you can accept or reject an entire order, or you can accept or reject individual shipments.

Example 4–1 PO Details page



a. To accept an entire order, click Accept Entire Order, enter a reason for acceptance, and click Submit.

b. To reject an entire order, click Reject Entire Order, enter the reason for the rejection, and click Submit.

c. To respond at a shipment level, makes your changes, enter the response reason, and click Submit. The available actions at the shipment level are Accept, Reject, and Change. The buyer is notified of your acknowledgment response.

Submitting Change Requests

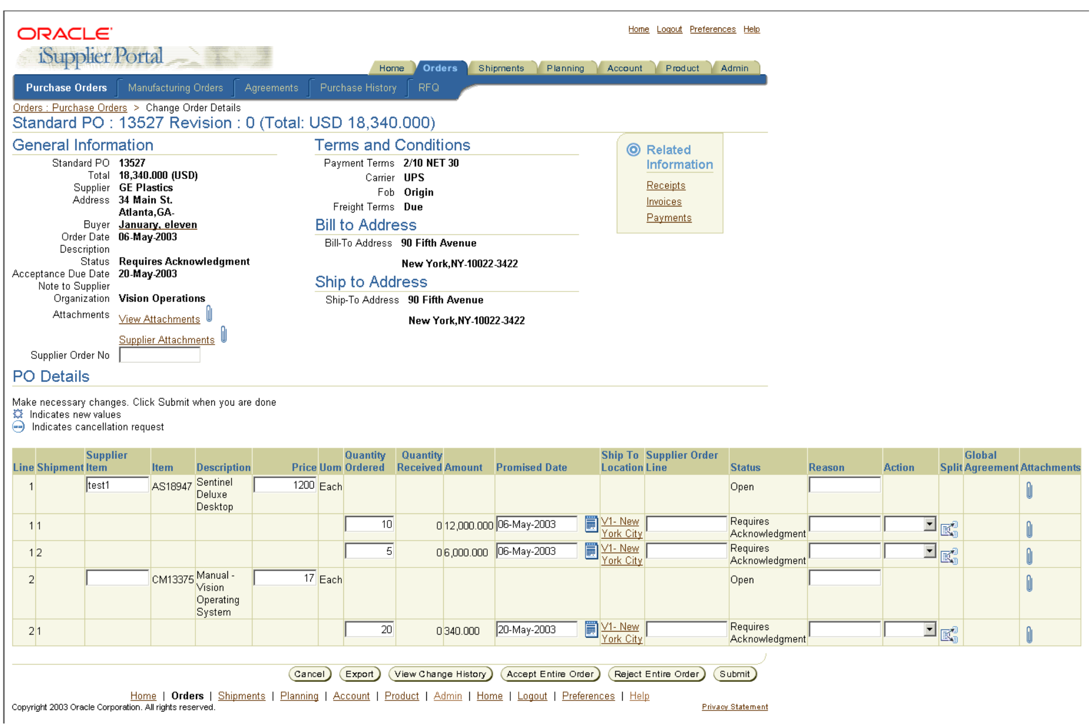
Oracle iSupplier Portal enables you to request changes to purchase orders when modifications are needed to fulfill an order. You can make changes during and after acknowledgment and to orders that do not require any acknowledgment.

You can view changes to purchase order requests while waiting for the buyer's response to your request, split shipments for quantity reasons, cancel change requests, and also view the change history of a purchase order.

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, select a purchase order.
3. Click Request Changes.
4. On the **PO Details** page, enter your changes.

Example 4–2 PO Details page



5. Select an action of change.

6. Enter a reason for change.
7. Click Submit.

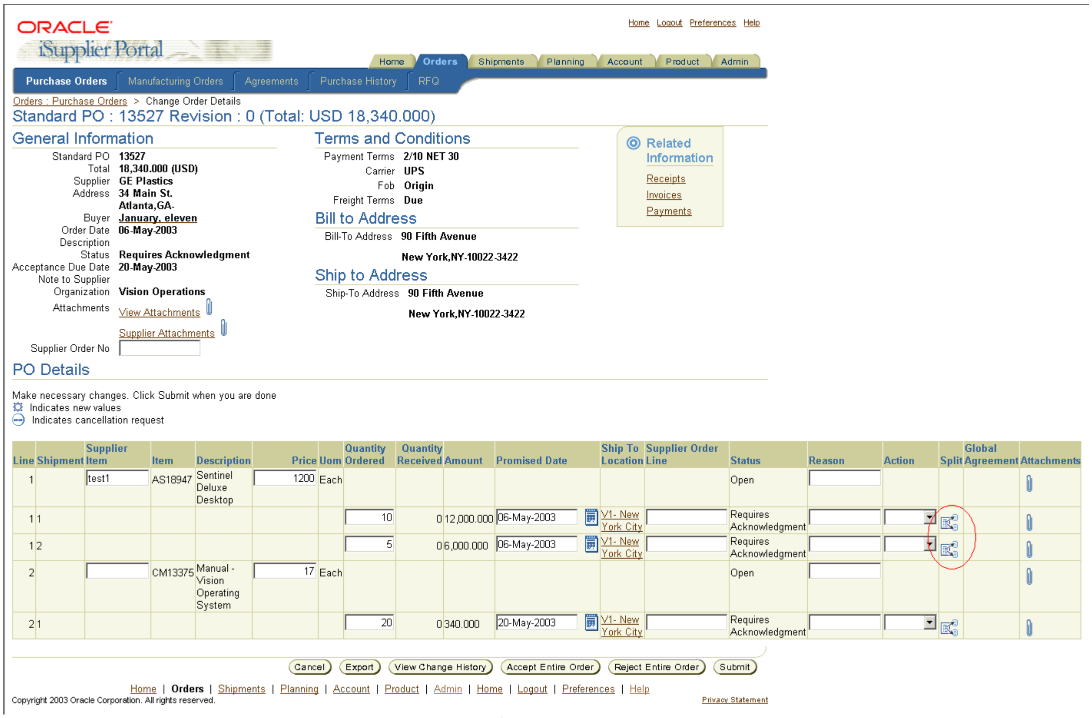
Note: After submitting your changes, the purchase order status changes to *Supplier Change Pending* until the buyer approves the changes.

To split a shipment request:

You can split a shipment request. For example, you can only partially ship the quantity ordered for the given date, you can request a split shipment change to communicate to the buyer the quantity you can deliver for the first shipment. You also enter the remaining quantity you can deliver on a new date for the new shipment line.

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.
2. On the **PO Details** page, click the Split icon on the desired shipment line. (On the **PO Details** page, another row is added for your split shipment.)

Example 4–3 PO Details page



3. In the Quantity Ordered field, enter a new quantity.
4. On the next line, in the Quantity Ordered field, enter the remaining quantity.
5. Enter a Promised Date.
6. Select an action of change.
7. Enter a reason for splitting.
8. Click Submit.

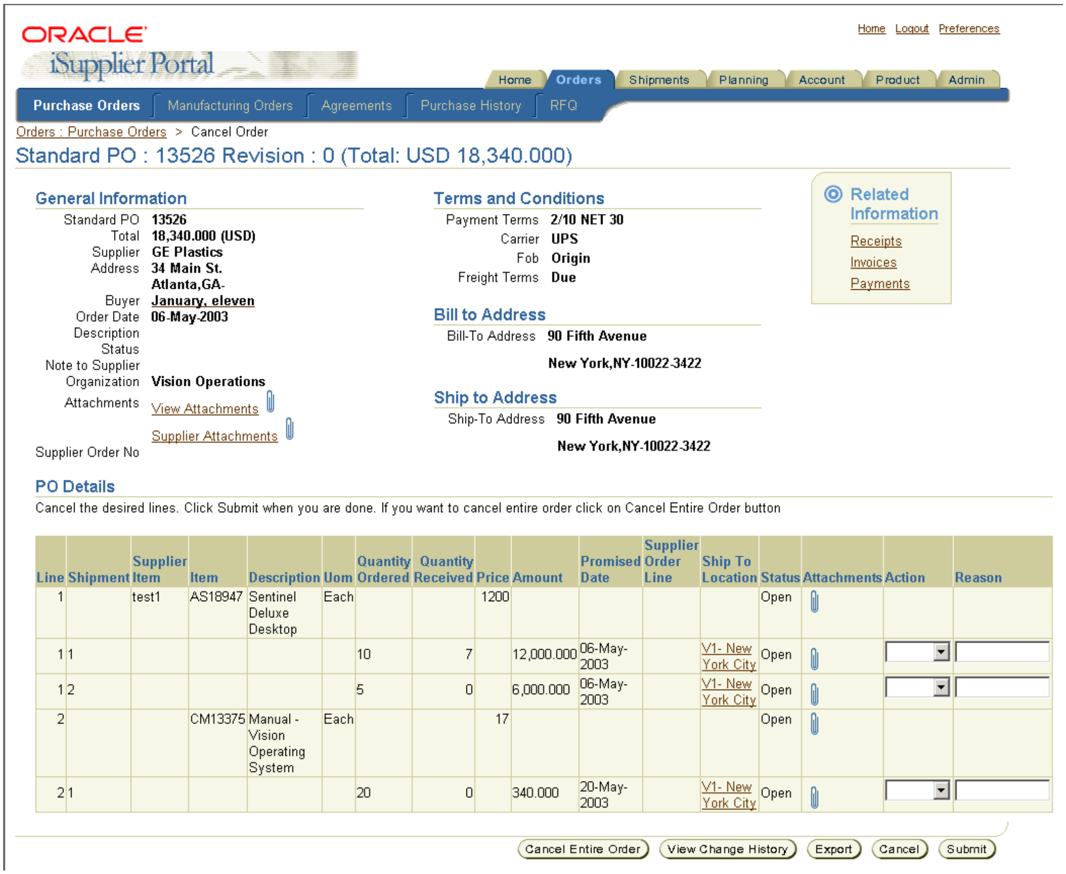
Note: You can split a shipment as many times as needed. To create more shipment lines, click the Split icon.

To cancel an order or shipment:

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. On the **PO Summary** page, to submit only cancellations, select a purchase order and click Request Cancellations. To request changes to certain shipments and cancel other shipments, click Request Changes.
3. To cancel the entire order, on the **PO Details** page, click Cancel Entire Order.

Example 4–4 PO Details



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iSupplier Portal

Home Logout Preferences

Home | Orders | Shipments | Planning | Account | Product | Admin

Purchase Orders | Manufacturing Orders | Agreements | Purchase History | RFQ

Orders : Purchase Orders > Cancel Order

Standard PO : 13526 Revision : 0 (Total: USD 18,340.000)

General Information

Standard PO **13526**
Total **18,340.000 (USD)**
Supplier **GE Plastics**
Address **34 Main St.**
Atlanta,GA-
Buyer **January, eleven**
Order Date **06-May-2003**
Description
Status
Note to Supplier
Organization **Vision Operations**
Attachments View Attachments
Supplier Attachments
Supplier Order No

Terms and Conditions

Payment Terms **2/10 NET 30**
Carrier **UPS**
Fob **Origin**
Freight Terms **Due**

Bill to Address

Bill-To Address **90 Fifth Avenue**
New York,NY-10022-3422

Ship to Address

Ship-To Address **90 Fifth Avenue**
New York,NY-10022-3422

Related Information

Receipts
Invoices
Payments

PO Details

Cancel the desired lines. Click Submit when you are done. If you want to cancel entire order click on Cancel Entire Order button

Line	Shipment	Supplier Item	Item	Description	Uom	Quantity Ordered	Quantity Received	Price	Amount	Promised Date	Supplier Order Line	Ship To Location	Status	Attachments	Action	Reason
1		test1	AS18947	Sentinel Deluxe Desktop	Each			1200					Open			
1	1					10	7		12,000.000	06-May-2003		V1- New York City	Open			
1	2					5	0		6,000.000	06-May-2003		V1- New York City	Open			
2			CM13375	Manual - Vision Operating System	Each			17					Open			
2	1					20	0		340.000	20-May-2003		V1- New York City	Open			

Cancel Entire Order | View Change History | Export | Cancel | Submit

4. On the **Cancel Purchase Order** page, enter a Reason for Cancellation and click Submit.

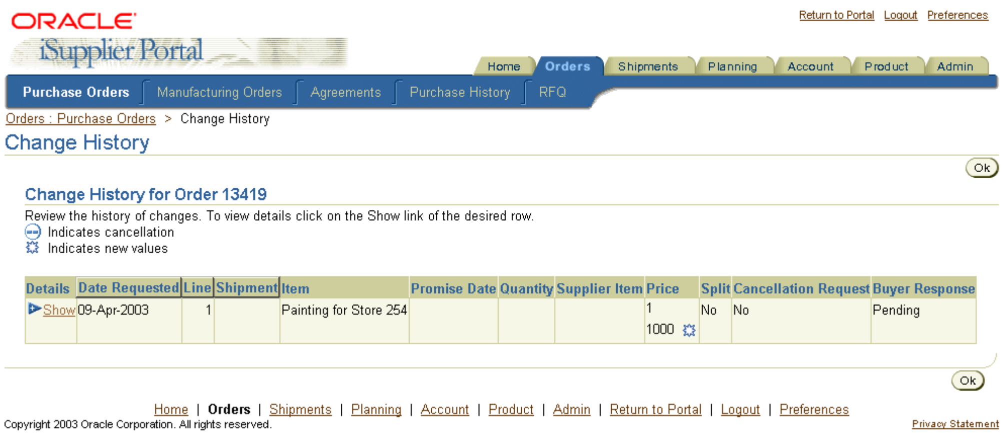
5. To cancel a few shipments, but not the entire order, select the Action Cancel from the list of values (on the shipment line you want to cancel), enter a cancellation reason and click Submit.

To view change order history:

You can submit multiple change requests to a purchasing document. 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. On the **PO Details** or **PO Summary** page, click Change Order History.
3. On the **Change History** page, view all of the changes made to the order.

Example 4–5 Change History page



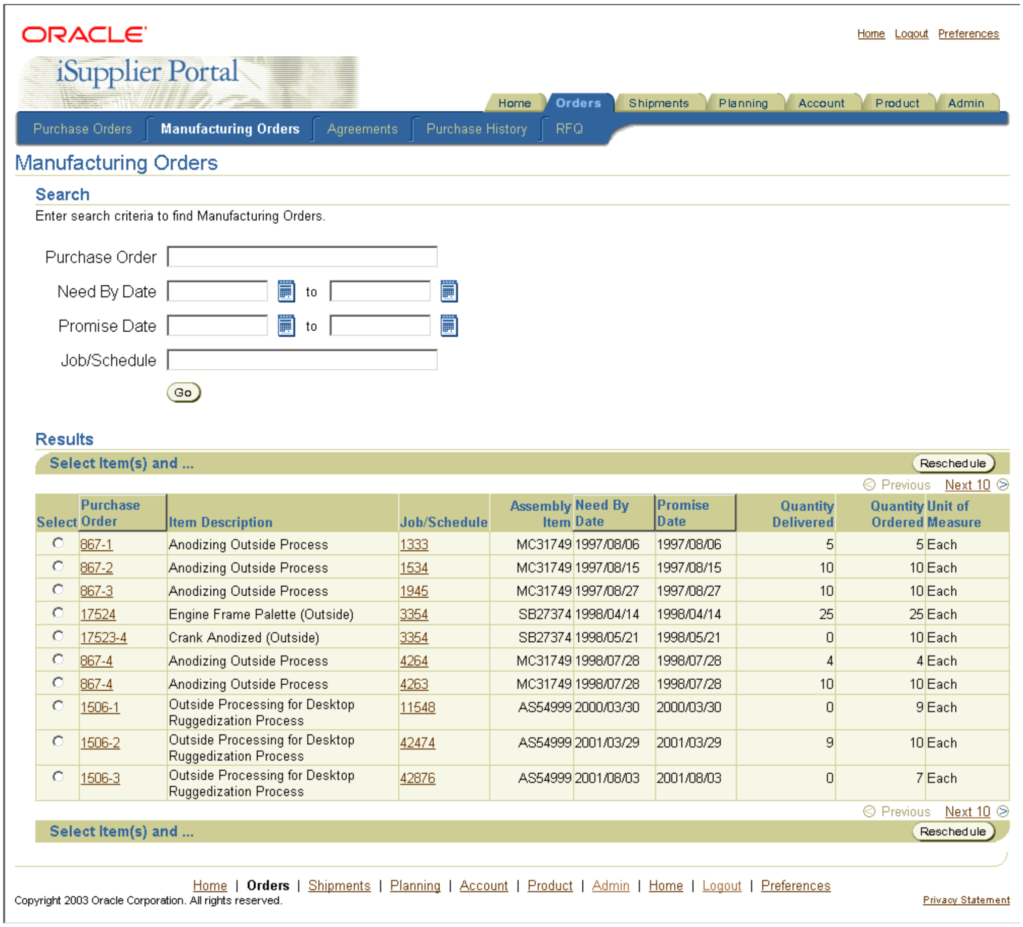
4. Click OK.

Manufacturing 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 third-party suppliers providing products needed to complete a supplier's final product.

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 reschedule an order.

Example 4–6 Manufacturing Orders page



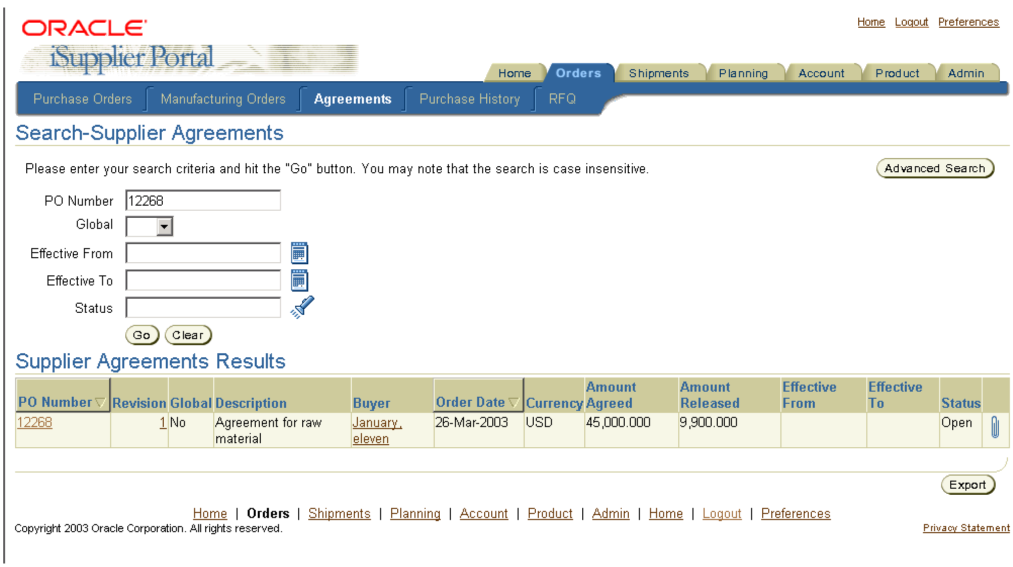
Select	Purchase Order	Item Description	Job/Schedule	Assembly Item	Need By Date	Promise Date	Quantity Delivered	Quantity Ordered	Unit of Measure
	867-1	Anodizing Outside Process	1333	MC31749	1997/08/06	1997/08/06	5	5	Each
	867-2	Anodizing Outside Process	1534	MC31749	1997/08/15	1997/08/15	10	10	Each
	867-3	Anodizing Outside Process	1945	MC31749	1997/08/27	1997/08/27	10	10	Each
	17524	Engine Frame Palette (Outside)	3354	SB27374	1998/04/14	1998/04/14	25	25	Each
	17523-4	Crank Anodized (Outside)	3354	SB27374	1998/05/21	1998/05/21	0	10	Each
	867-4	Anodizing Outside Process	4264	MC31749	1998/07/28	1998/07/28	4	4	Each
	867-4	Anodizing Outside Process	4263	MC31749	1998/07/28	1998/07/28	10	10	Each
	1506-1	Outside Processing for Desktop Ruggedization Process	11548	AS54999	2000/03/30	2000/03/30	0	9	Each
	1506-2	Outside Processing for Desktop Ruggedization Process	42474	AS54999	2001/03/29	2001/03/29	9	10	Each
	1506-3	Outside Processing for Desktop Ruggedization Process	42876	AS54999	2001/08/03	2001/08/03	0	7	Each

Supplier Agreements

This page provides a list of purchase agreements that you made with the buying company. You can review the details of those agreements and the corresponding releases (orders) that have been created for a particular agreement.

Using the search criteria, you can 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.

Example 4–7 Supplier Agreements Results page



Requests For Quotes (RFQ)

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

This page provides the details of all RFQs created by the buying company in its ERP application. You can view the details of the RFQ by selecting the RFQ number. Details about the company contact are available by selecting the Contact Name, and details of the Ship To Location are available by selecting the Location Code. You can export details from any page.

Example 4–8 RFQ Summary Results page

5

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.

This chapter includes the following:

Shipping Information

Shipping information details all of your shipping transactions on Oracle iSupplier Portal. You can use existing shipments to create or cancel shipment notices, or 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
- Viewing Delivery Schedules on page 5-7
- Viewing Overdue Receipts on page 5-8

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 include:

- Shipment date
- Shipment and time identification number
- Expected receipt date (due date)
- Packing slip data and freight information
- Item details, including cumulative shipped quantities
- Purchase order number, including releases

You can enter billing information on an ASN to create an ASBN. An ASBN creates an invoice in the buyer's payables system. The billing details that can be included on an ASBN are:

- Invoice number
- Invoice date
- Invoice amount
- Freight amount
- Tax amount

The Advance Shipment Notices section includes:

- Creating Advance Shipment Notices and Advance Shipment Billing Notices on page 5-3
- Canceling Submitted Advance Shipment Notices and Advance Shipment Billing Notices on page 5-6

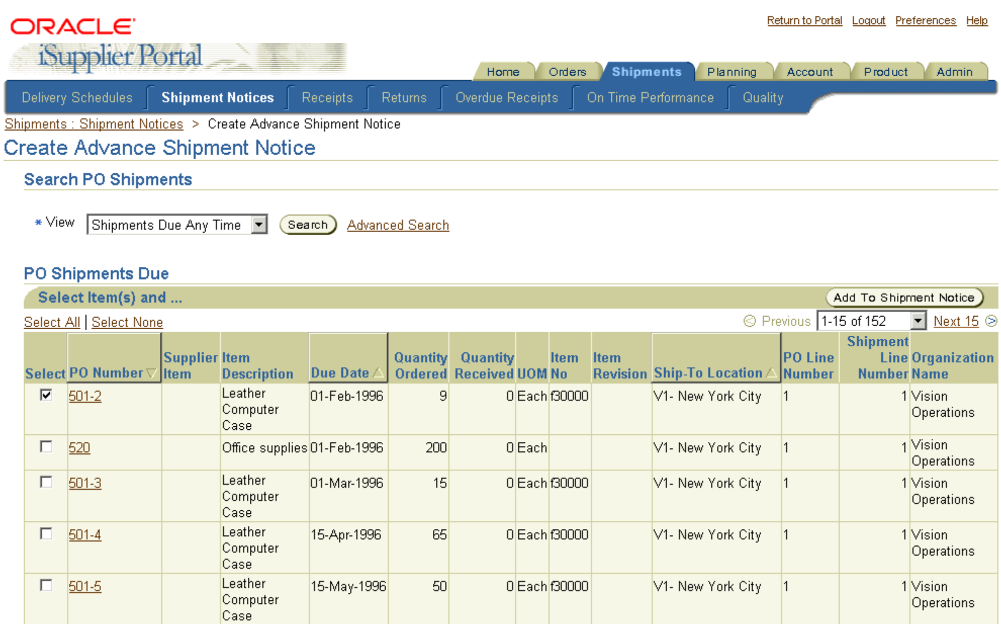
Creating Advance Shipment Notices and Advance Shipment Billing Notices

Using existing shipments, you can create advance shipment notices and advance shipment billing notices.

To create advance shipment notices and advance shipment billing notices:

1. Click the Shipments tab, then click the Shipment Notices task.
2. Click "Create Advance Shipment Notices" for an ASN or "Create Advance Shipment Billing Notice" for an ASBN.

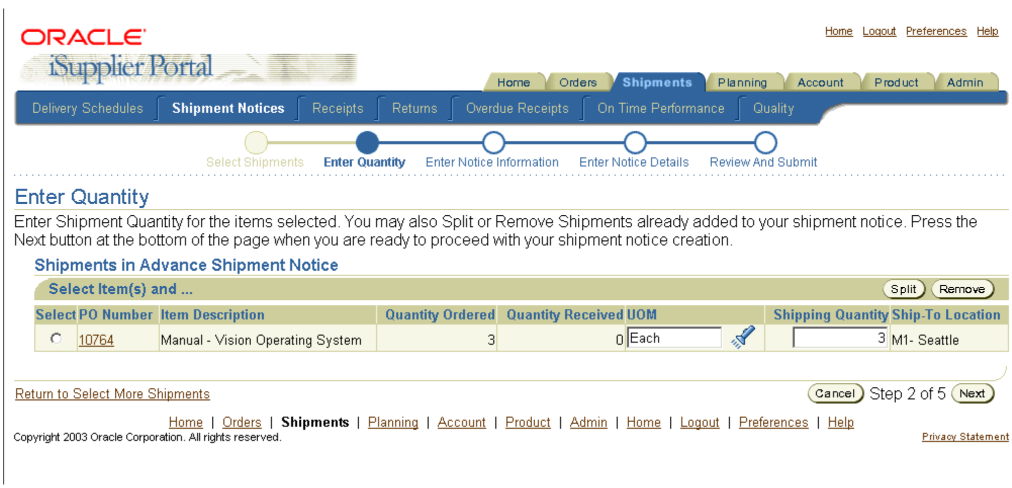
Example 5–1 Create Advance Shipment Notice page



3. Select either View Shipments Due This Week or View Shipments Due Any Time. Click "Advance Search" to enter additional search criteria.
4. Click Search.
5. Select a purchase order shipment or shipments and click Add to Shipment Notice.

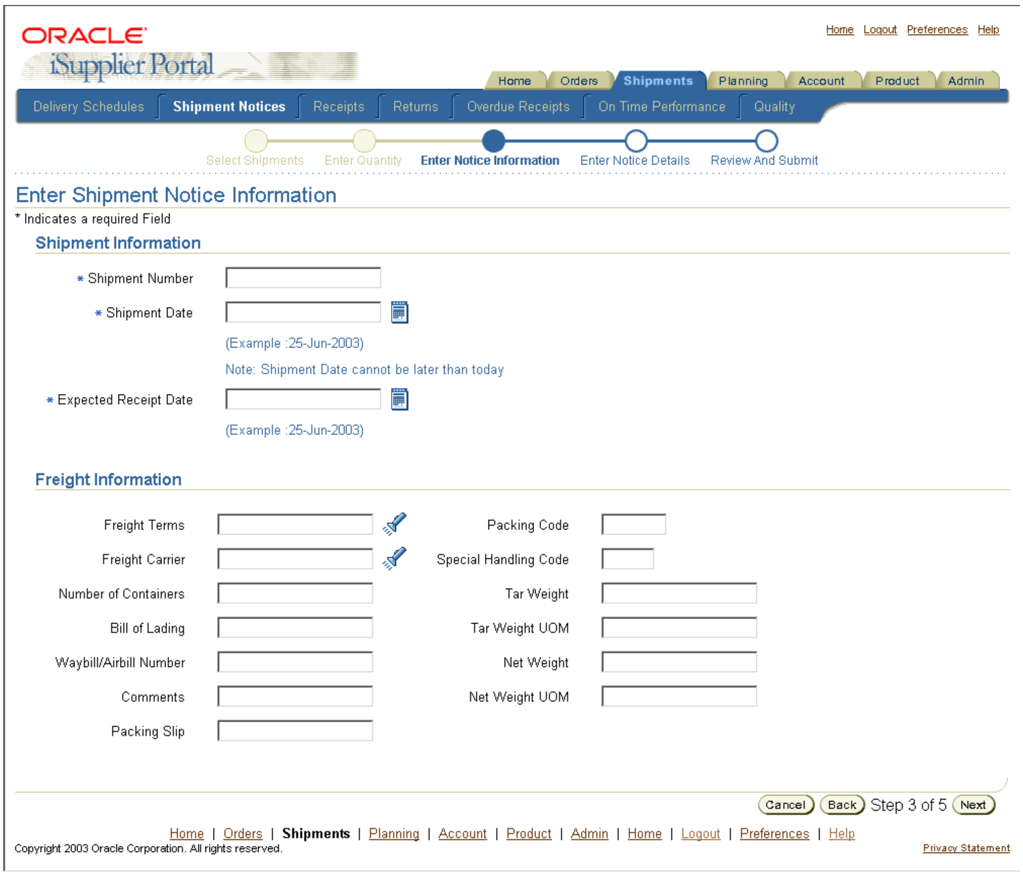
Note: You can always add more shipments by clicking "Select More Shipments" on the **Enter Quantity** page.

Example 5–2 Enter Quantity page



6. Enter a shipping quantity.
   a. To split a shipment line, select a line, click Split, and enter a Shipping Quantity.
   b. To remove a shipment line, select a line, and click Remove.
7. Click Next. Enter the required ASN or ASBN information.

Example 5–3 Enter Shipment Notice Information page



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 also enter the following billing information:

– Invoice number

– Invoice date

– Invoice amount

8. Click Next to enter shipment line details.

You can enter the line details once for all shipment lines if the details are common to all lines. If the line details differ per shipment line, click "No, some information differs by shipment" and then click Next. You can then enter the shipment details individually for every line.

Example 5–4 Enter Shipment Notice Line Details page

9. Click Next.
10. Review the ASN or ASBN and click Submit.

Canceling Submitted 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, then click the Shipment Notices task.
2. On the **Shipment Notices** page, click "View/Cancel Advance Shipment Notices."
3. On the **View/Cancel Advance Shipment Notices** page, search for and select your advance shipment notice.

   Note: You can use the advance search feature to narrow your search.

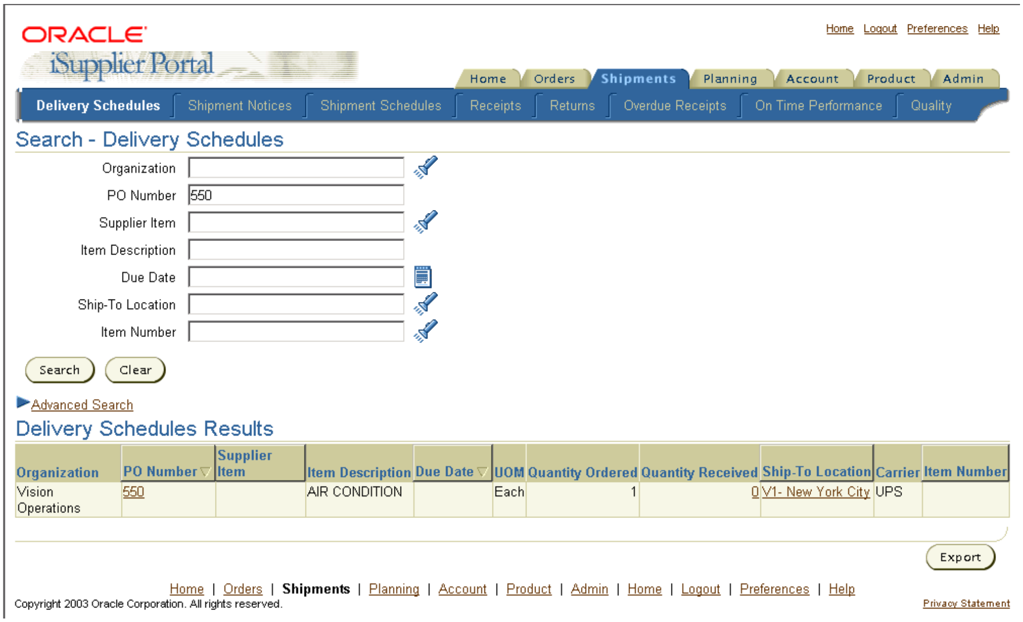
4. Click Cancel Shipment Notice. A notification of your cancellation is sent to the buyer.

   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.

Viewing Delivery Schedules

You can use this page to quickly determine if deliveries require schedules and past due shipments. To schedule deliveries with more accuracy, the shipment detail results can be reviewed and exported. Click the purchase order number, receipt quantity, and ship-to location links to view further detail.

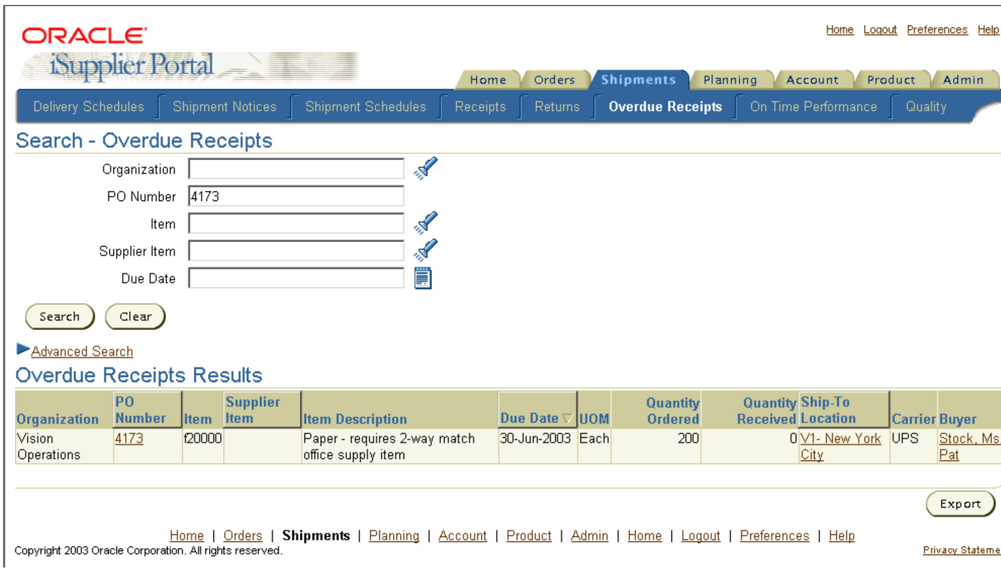
Example 5–5 Delivery Schedules Results page



Viewing Overdue Receipts

This page enables you to view the details of past due purchase order shipments. Click the purchase order number, ship-to location, and buyer links to view further detail.

Example 5–6 Overdue Receipts Results page



Receiving Information

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

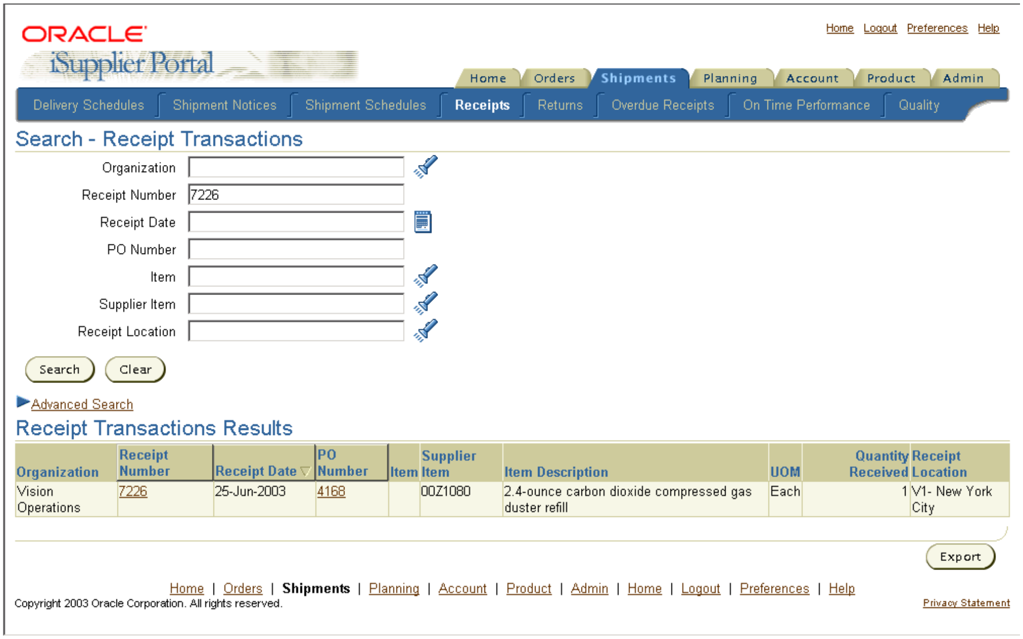
The receiving information section includes:

- Viewing Receipts on page 5-9
- Viewing Returns on page 5-10
- Viewing On-Time Delivery Performance on page 5-11

Viewing Receipts

This page enables you to explore a historical view of all receipts that have been recorded for your shipped goods. Click the receipt number and purchase order number links to view further detail.

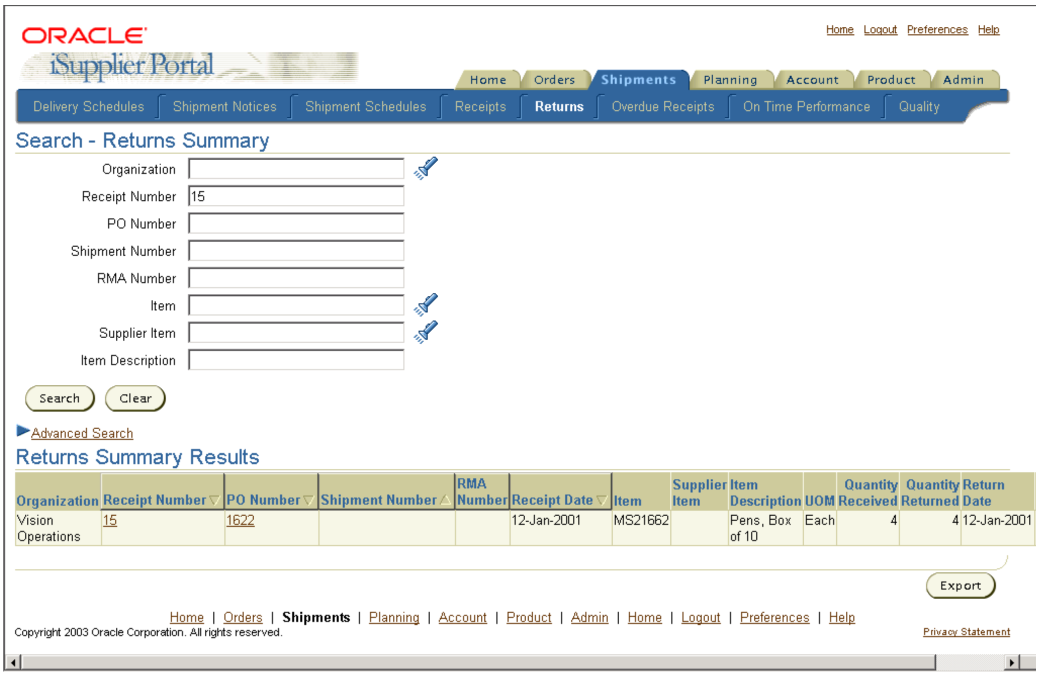
Example 5–7 Receipts Transactions Results page



Viewing Returns

Click Returns from the Shipment tab 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 the receipt and purchase order links to view further detail.

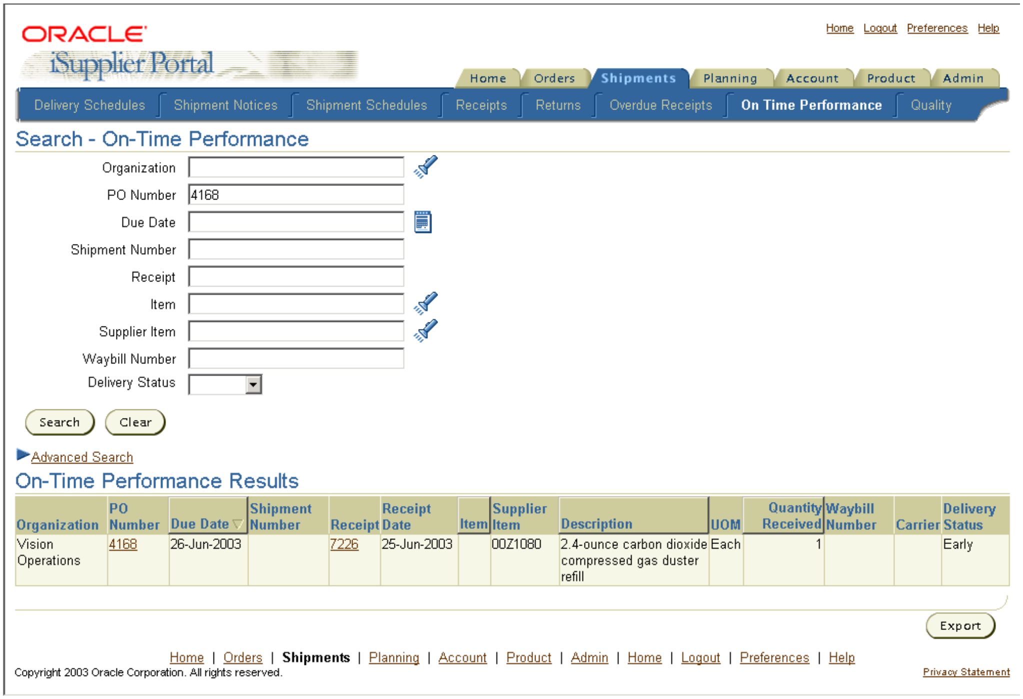
Example 5–8 Returns Summary Results page



Viewing On-Time Delivery Performance

This page provides the delivery status of shipments you made against purchase orders. You can view your performance for timeliness of deliveries. Click the purchase order and receipt number links to view further details.

Example 5–9 On-Time Performance Results 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.

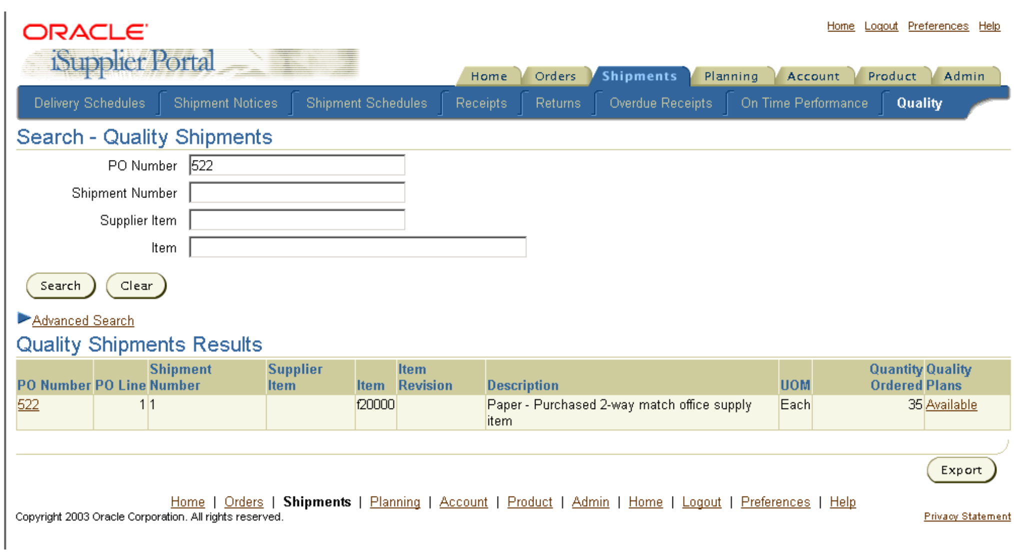
The system displays an available link in the Quality Plans column. Clicking this link displays a list of collection plans associated with your purchase order. You can enter quality results, view quality results submitted, or view attachments for any purchase order listed.

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:

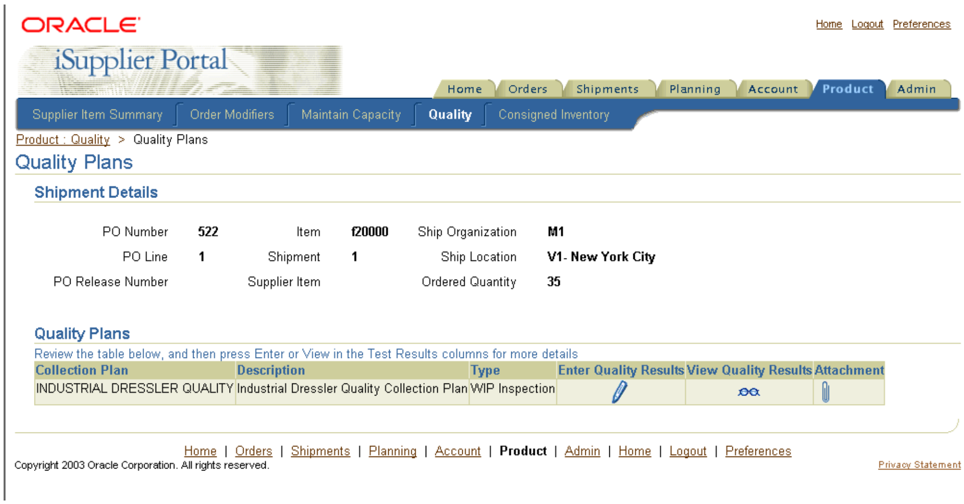
1. On the Shipments tab, click Quality in the task bar directly below the tabs.

Example 5–10 Quality Shipments Results page



2. On the **Quality Shipment Results** page, search for a shipment.
3. Select your shipment and click "Available" in the Quality Plans column.
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.

Example 5–11 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.)

Example 5–12 Enter Test 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.)

Example 5–13 Enter Test Results page

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

Using Oracle iSupplier Portal, you can 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

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. When selecting the Planning tab, you can view plans that communicate forecast information. For planning information, you can view forecast schedules. A summary of schedules is displayed and you can select each schedule to view details. Click the schedule number link for further information.

Product Information

Using the Product tab, you can view information about the products you provide. Some of the information available can be found in other areas, however, this is the only location where you can easily access all of it in one place by item.

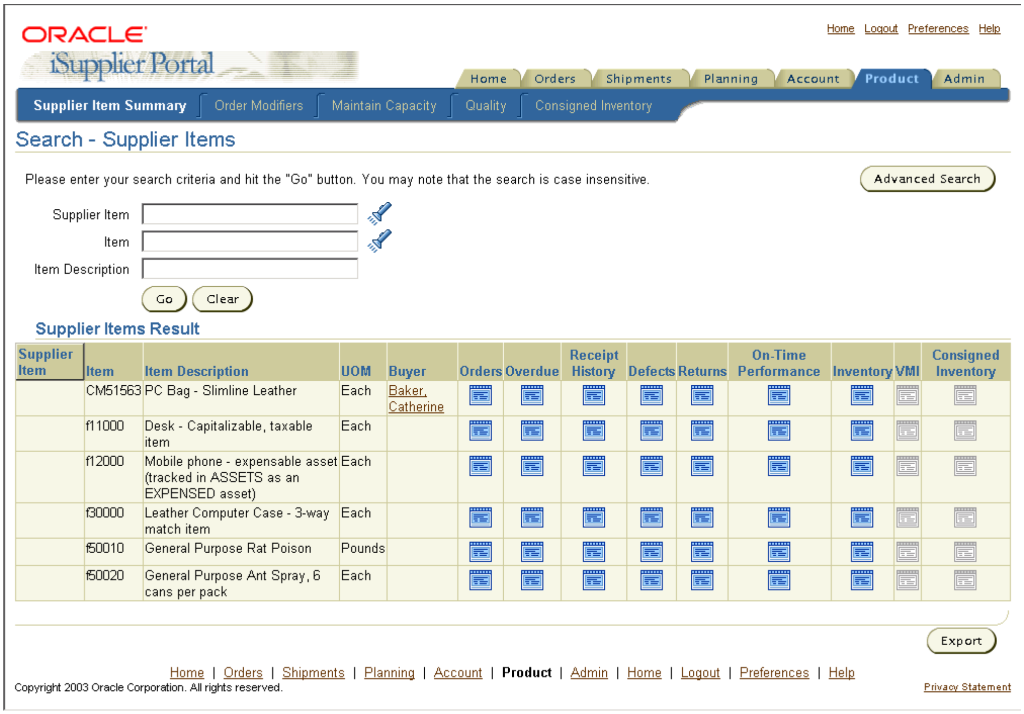
The product information section includes:

- Viewing Supplier Item Summary on page 6-2
- 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

This 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:

Example 6–1 Supplier Items Result page



Orders A summary of order lines placed with you for this item. This summary includes quantity ordered, quantity received, quantity invoiced, and price break information. Click the purchase order number, ship-to location, and buyer links for further information.

Overdue A summary of overdue receipts for the selected item. Click the purchase order and receipt number links for further information.

Receipt History A summary of receipts for the selected item. Click the purchase order and receipt number links 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 the purchase order number and receipt links for further information.

On-Time Performance A summary of receipts for an item that includes due dates, receipt dates, and shipping information. Click the purchase order and receipt links 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).

Most of the summaries are available to export.

Viewing Item Inventory Information

You can view your item inventory information. Viewing your item inventories enables you to view on-hand inventories, item locations, lots, and serials.

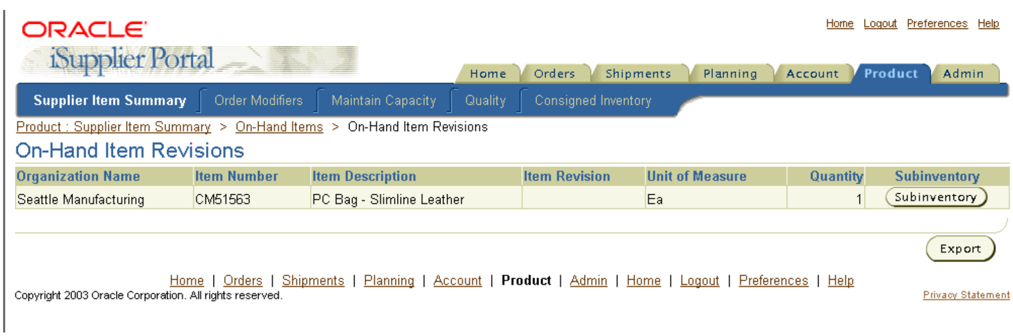
To view item inventory information:

1. On the Product tab, click Supplier Item Summary in the task bar directly below the tabs.
2. On the **Supplier Items Result** page, select your item and click the Inventory icon.
3. Click Revision to view any revisions made to an item.

Example 6–2 On-Hand Items page

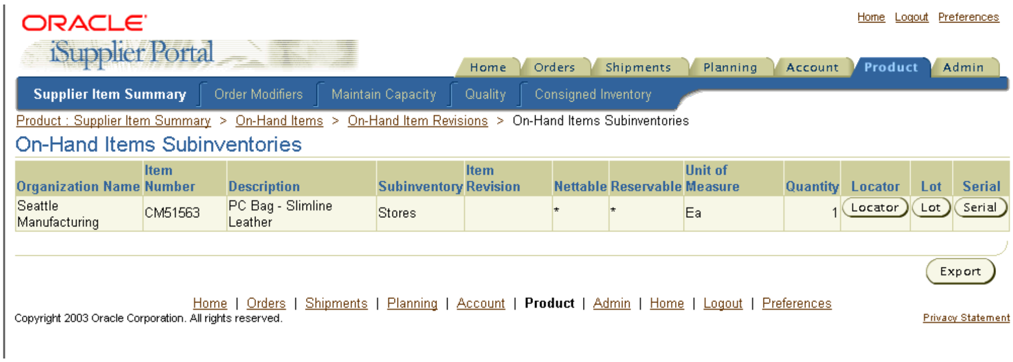
4. Click Subinventory to view subinventory information for an item.

Example 6–3 On-Hand Item Revisions page



5. Click Locator, Lot, or Serial to view any specific item information.

Example 6–4 On-Hand items Subinventories page



6. Click Export to download your inventory information.

Maintaining Capacity Information

You can accurately maintain your delivery capacity online. Buying companies 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 which has been sourced to you:

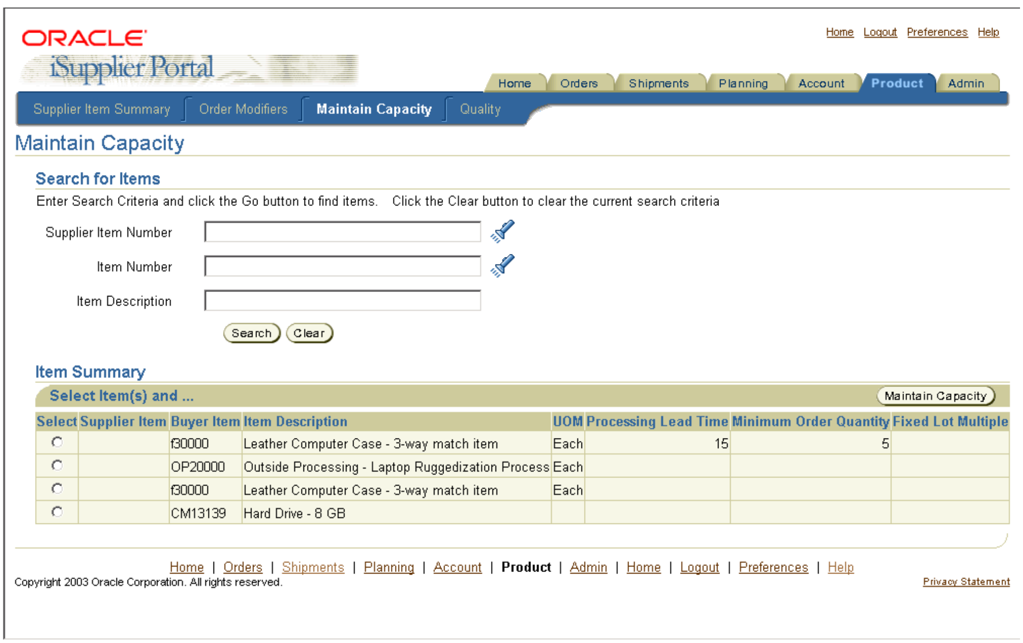
- Processing lead time
- Order modifiers: minimum order quantity and fixed lot multiple
- Capacity per day for a range of effective date
- Tolerance fences: tolerance percentage and days in advance

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:

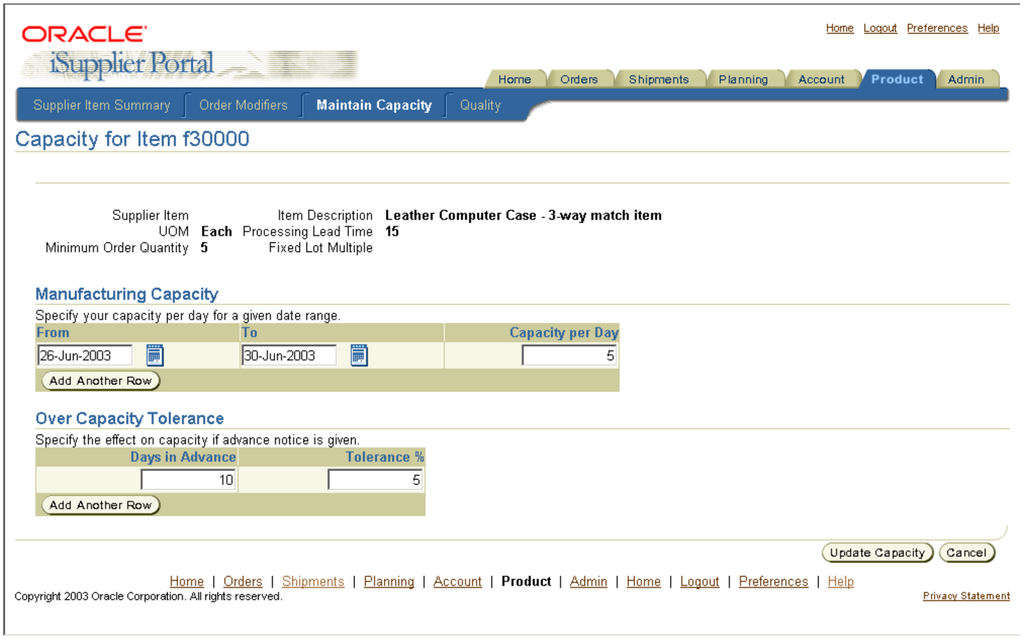
1. On the Product tab, click Maintain Capacity in the task bar directly below the tabs.
2. On the **Maintain Capacity** page, enter search criteria information.

Example 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.

Example 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.

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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.

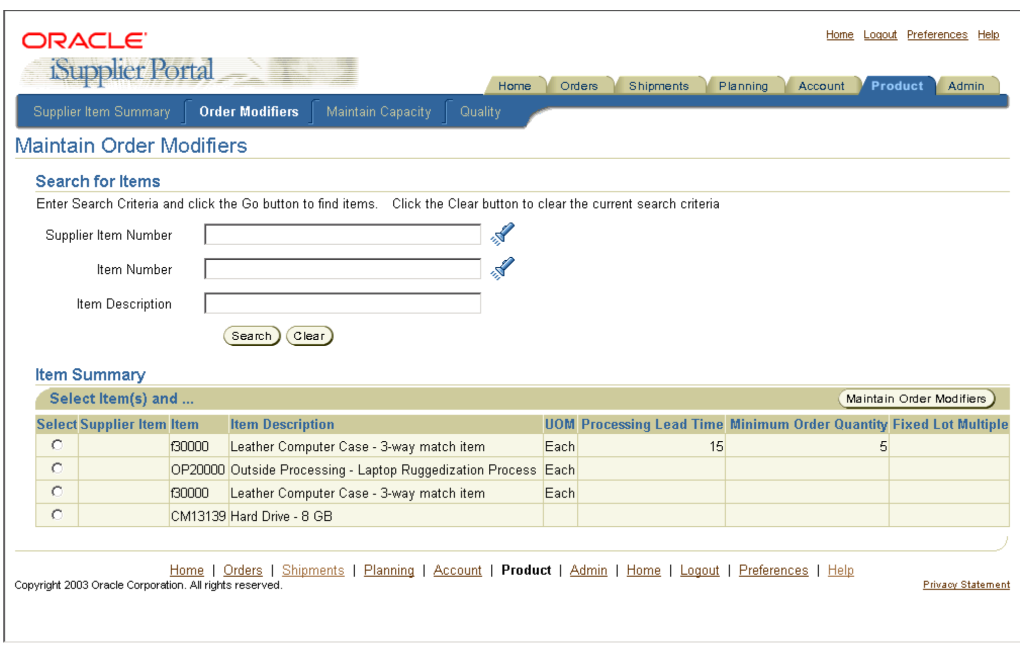
Maintaining Order Modifiers

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. On the Product tab, click Order Modifiers in the task bar directly below the tabs.
2. On the **Maintain Order Modifiers** page, enter search criteria information and click Search.

Example 6–7 Maintain Order Modifiers page



3. Select your item and click Maintain Order Modifiers.

Example 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.
6. 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 **VMI Search** 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. Find 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. On the Product tab, 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.

7

Invoice and Payment Information

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

This chapter includes the following:

Submitting Invoices

The buying company must have Oracle Payables installed for you to 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.) You can 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 organization that you are invoicing.

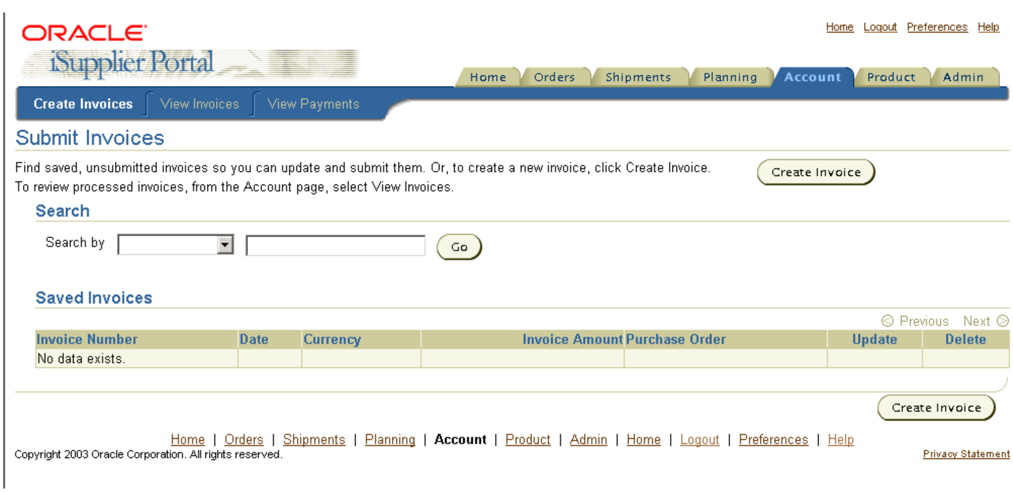
You can also partially complete an invoice, save it, and submit it later.

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.

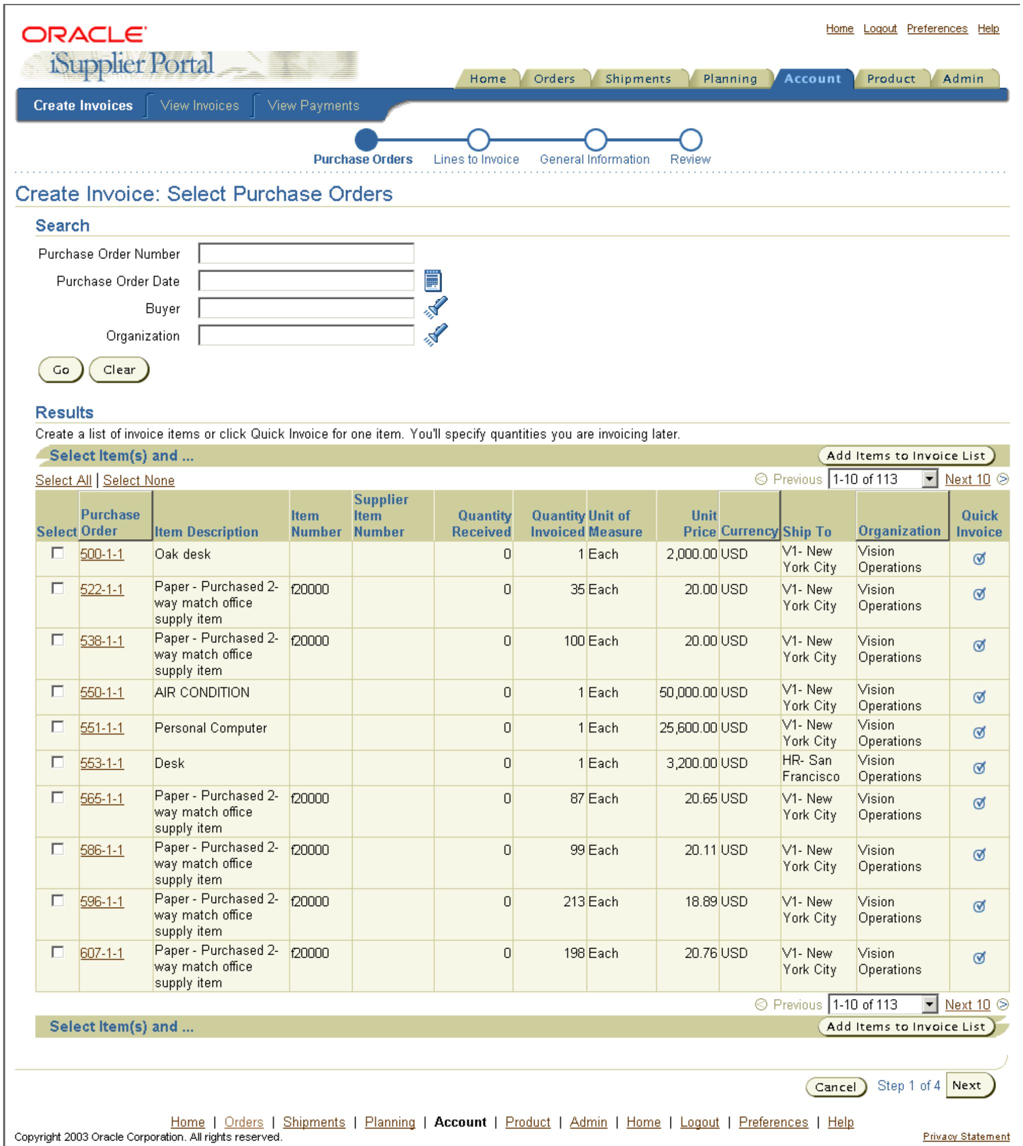
To submit an invoice:

1. On the Account tab, click Create Invoices in the task bar directly below the tabs.

Example 7–1 Submit Invoices page



2. On the **Submit Invoices** page, enter search criteria and click Go



3. 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.)

4. 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.

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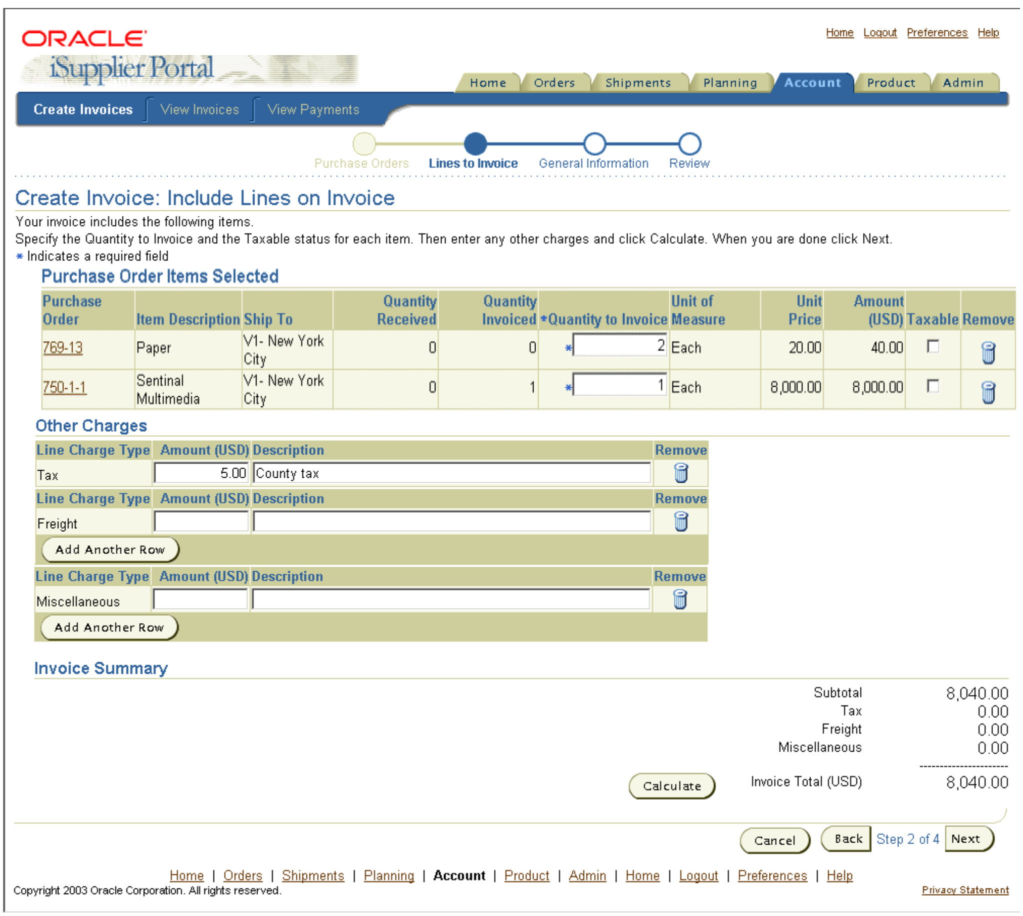
5. On the **Include Lines Invoice** page, enter a quantity shipped, taxable status, and any additional charges.

Example 7–2 Create Invoice: Include Lines on Invoice page



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

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6. Click Next.
7. On the **General Invoice Information** page, enter an invoice number, invoice date, and a description.
8. Click Next.
9. On the **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. Click OK, to 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.

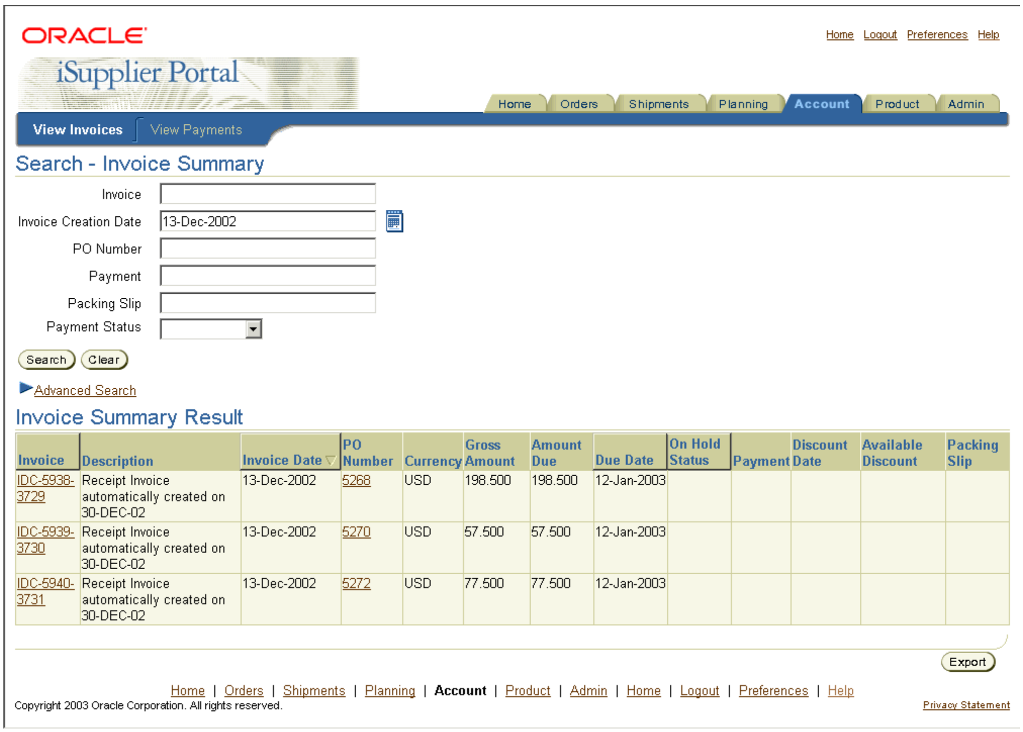
Viewing Invoice Information

The **Invoice Summary Results** page enables you to view the history of all your invoices by the buying company. You can create a summary list based on:

- Invoice
- Invoice creation date
- Purchase order number
- Payment
- Paid or unpaid invoices
- On-hold invoices
- Packing slip

From the summary list of invoices, 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.

Example 7–3 Invoice Summary Result page

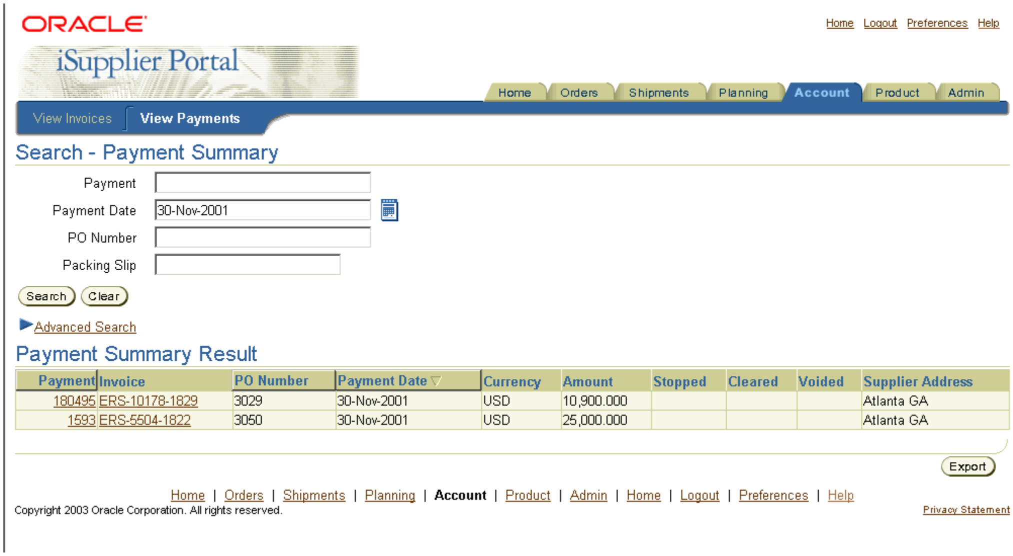


Note: If you submitted your invoice online, there may be a delay before you can review it because the Accounts Payable department needs to process it first.

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 create a summary list based on your entries for payment number, payment date, purchase order number, and packing slip identifier.

Example 7–4 Payment Summary Result 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, 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

The following flow chart describes how the information you enter in Supplier Profile Management is processed in the system. First you log into the system and access your profile. You can then enter information for your address book, contact directory, business classifications, or your products and services. 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.

Example 8–1 Supplier Details page

Address Book

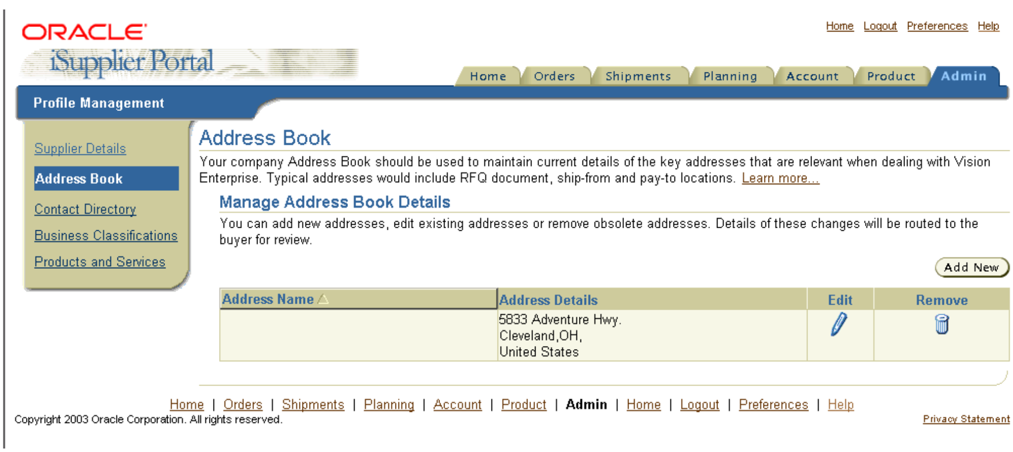
Using Supplier Profile Management, you can enter profile details such as address book information online. You can create and modify the multiple addresses used in transactions with the buying company (for example, purchasing locations, payment sites, and addresses for RFQs). You can provide a comment for each address entry to describe how it is used. For example, you can enter an address record and indicate it is a purchasing site. You can inactivate addresses that are obsolete.

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 New.

Example 8–2 Manage Address Book Details page



3. On the **New Address** page, complete the required fields.
4. Click Apply.

To edit or remove address book details:

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 selling the company's goods and services. After entering the contact details, you can link the contacts to the appropriate address (described below). 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.

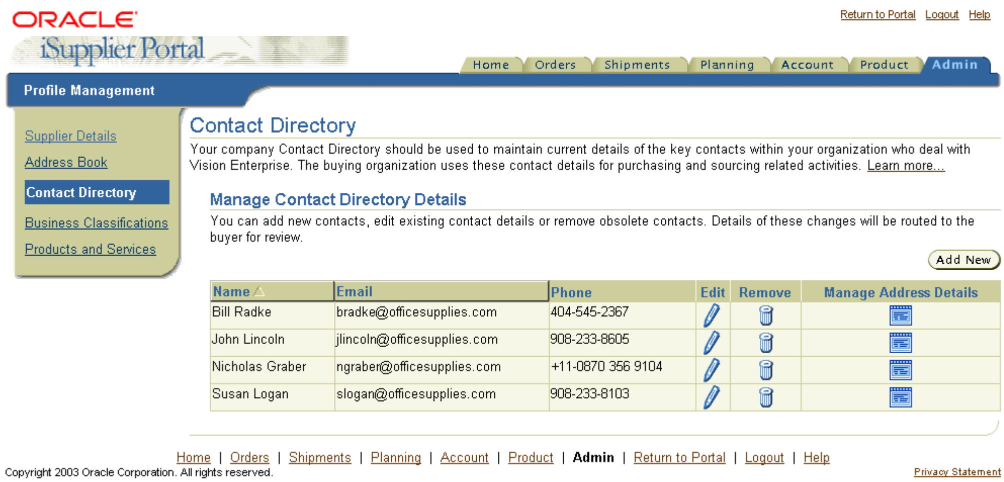
After you enter the information, buyer administrators are notified of the changes. They must review the updates and decide how to use the contact details to update the purchasing system. Therefore, your changes may not be promoted to the purchasing system for a few days.

After you create a contact in the directory, you can assign the contact to the appropriate address in your address book. As people move within your organization, you can also revise the address details for a contact.

To manage contact details:

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

Example 8–3 Manage Contact Directory Details page

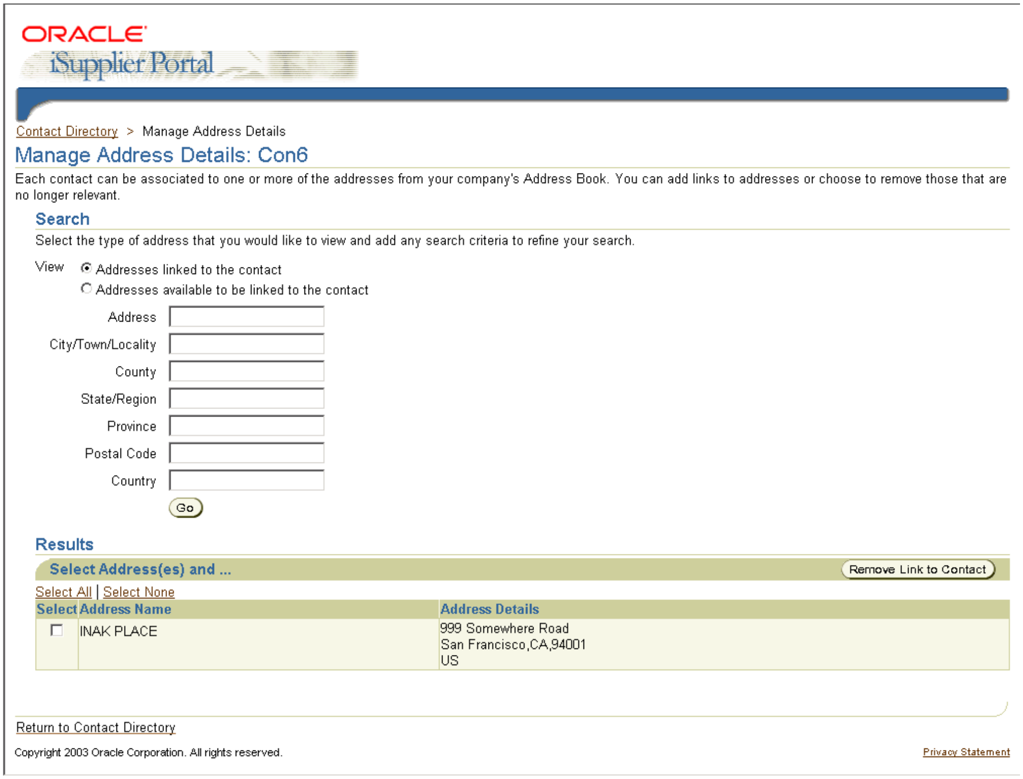


3. On the **New Contact** page, complete the required fields.
4. Click Apply.

To link a contact to an address:

1. On the **Contact Directory** page, in the Manage Contact Directory Details section, select a contact and click the Manage Address Details icon.
2. On the **Manage Address Details** page, select Addresses available to be linked to the contact.

Example 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 or remove contact details:

1. On the **Contact Directory** page, click either the Edit or Remove icon.
2. Click Apply.

Business Classifications

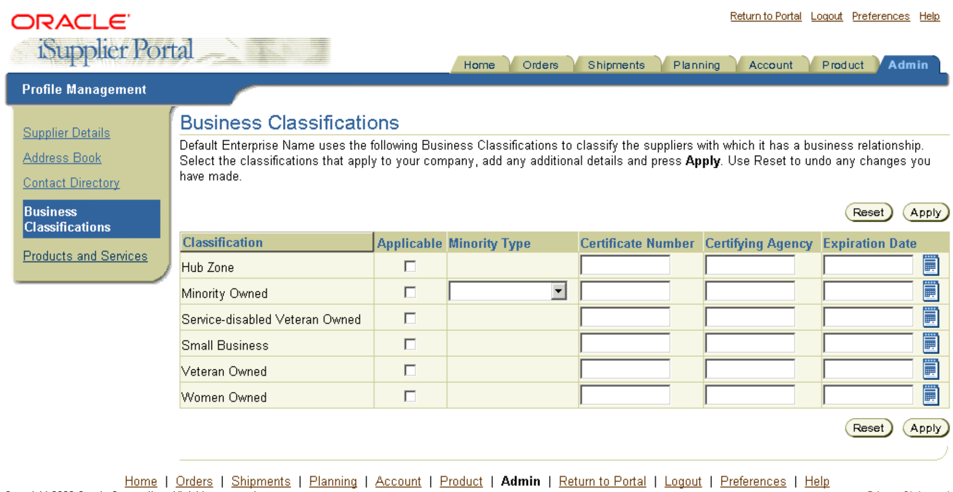
Buying companies establish a list of business classifications they want to use to classify their supply base. In some regions, these classifications are required by government regulations.

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, click Applicable to enable that classification.

Example 8–5 Business Classifications page



3. Complete the remaining fields.
4. Click Apply.

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.

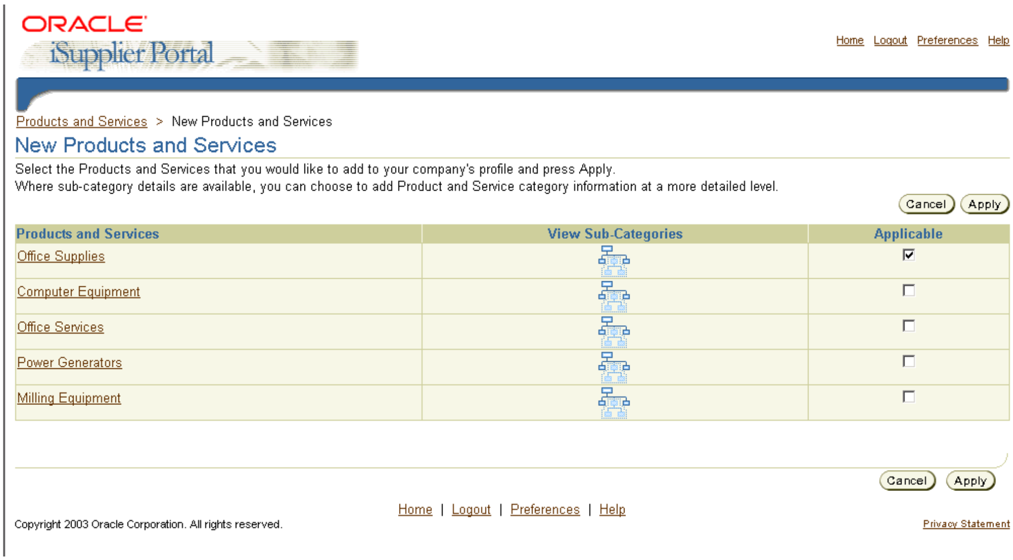
To claim products and services:

1. On the **Supplier Details** page, click "Product and Services."
2. On the **Product and Services** page, the system displays the list of preselected categories. (To browse child category details for any parent, click the View Sub-Category icon or the category name.)
3. Click Add New.

Example 8–6 Products and Services page

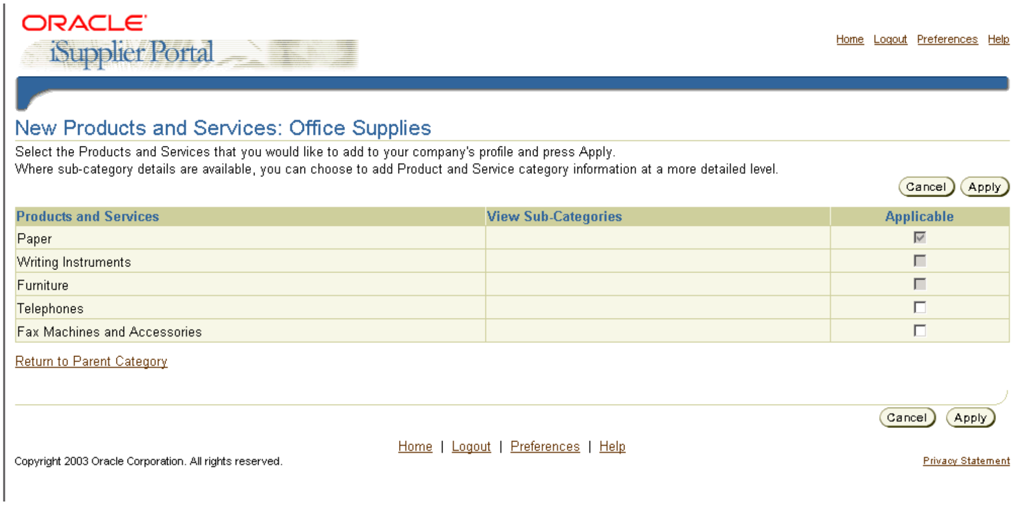
4. On the **New Products and Services** page, browse for a product or service and click Applicable. (Any previously selected products or services are already selected as Applicable.)

Example 8–7 New Products and Services page



Note: To view sub-category information about a product or service, click the product or service name or the View Sub-Categories icon. Click Applicable to apply a particular sub-category.

Example 8–8 New Products and Services: Sub Categories page



5. Click Apply.

To remove products or services:

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

Index

T

U

V

W