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## **Training Guide**

### **Oracle E-Business Suite eProcurement Training – iSupplier Portal for End-Users**

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## **Introduction**

### **Oracle iSupplier**

Oracle iSupplier Portal is being deployed at NEORS D to enable district suppliers to efficiently manage interaction and communication with the district for all purchasing activity. The portal provides a secure, Internet-based access point that enables direct and real-time access to purchasing and invoicing activity with NEORS D.

Suppliers access the latest information for their individual accounts, including:

- Purchase Orders
- Shipments and Shipment Notices
- Receipt information
- Delivery information
- Invoice and Payment status

The two-way collaboration enables suppliers to:

- Submit change requests
- Process shipment notices
- Create and submit invoices
- Update profile data

### **Sourcing Supplier Portal**

Registered suppliers will also have access to the Sourcing Supplier portal. This portal also provides a secure, Internet-based access point that enables direct and real-time access for responding to bid invitations and communicating directly with the NEORS D purchasing administration.

The Sourcing Supplier Portal enables suppliers to:

- Receive immediate notification of bid request invitations from NEORS D
- Complete and submit complete bid responses online
- Communicate through messaging directly with NEORS D purchasing administrators for any questions or information requests related to bid invitations and responses

## **Objectives**

During this training course, supplier users will learn how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with NEORS D purchasing administrators

## Topic 1: iSupplier Portal and Home Page Review

### Supplier Access and Account Setup

Approved supplier users to will be registered at NEORSF for access to the iSupplier portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated NEORSF administrators. The email information will also include the appropriate **link** to the iSupplier login page for access.

This topic covers:

- Navigation to the iSupplier Home Page
- Review of Home Page elements

### iSupplier Login

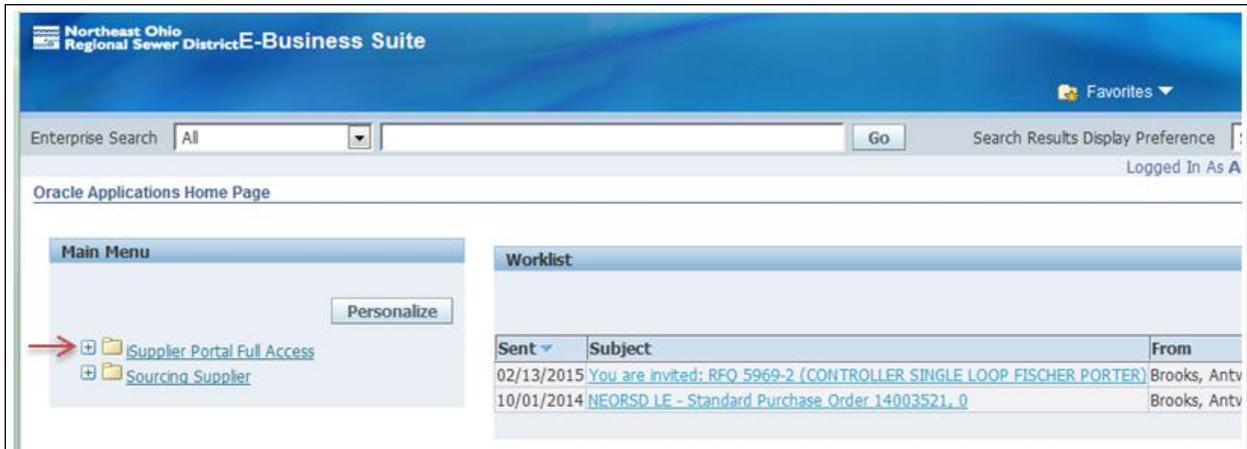


The screenshot shows the iSupplier Login page for the Northeast Ohio Regional Sewer District. The page features a blue header with the district's name and logo. Below the header is a navigation bar with several icons. The main content area is light blue and contains a login form. The form has two input fields: "User Name" with the value "mcastro@indsaf.com" and "Password" with a masked value "\*\*\*\*\*". Below the password field is a "Login" button and a "Cancel" button. There is also a "Login Assistance" link and an "Accessibility" dropdown menu set to "None". At the bottom of the form, there is a "Select a Language" dropdown menu set to "English". The footer of the page contains links for "About this Page" and "Privacy Statement".

The **Login** screen is displayed.

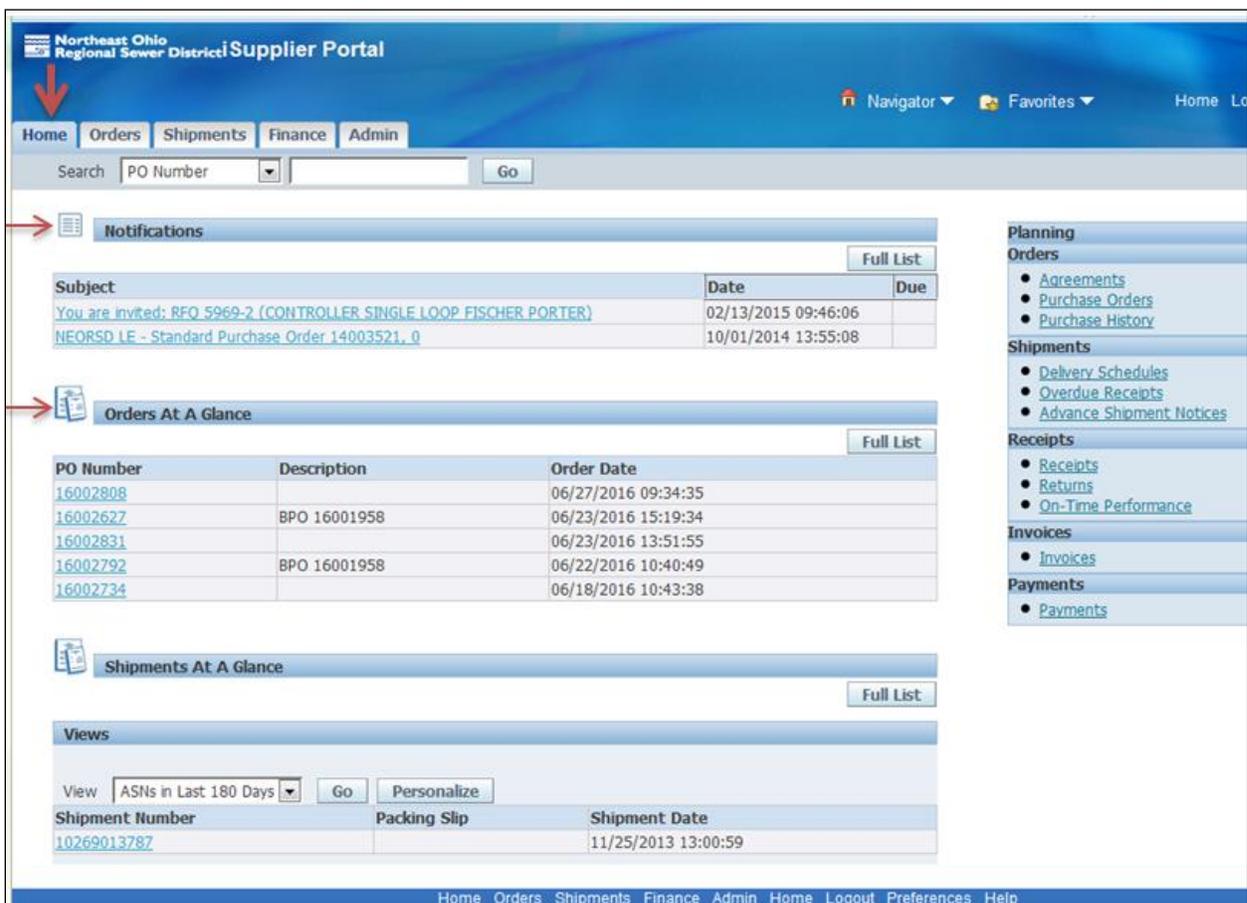
- 1- Enter assigned value in the **User Name** field.
- 2- Enter assigned value in the **Password** field.
- 3- Click the **Login** button.

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The Oracle Applications Home Page is displayed.

4- Click the **Supplier Portal Full Access** link.



The iSupplier Portal Home Page is displayed.

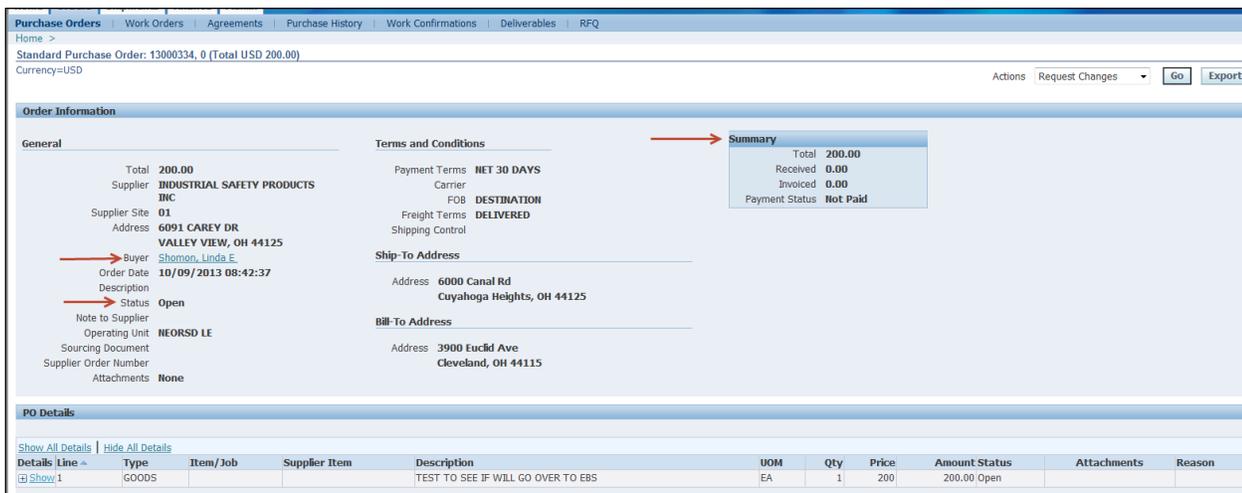
- 5- Note the **Notifications** region of the screen. Notifications from NEORSD purchasing personnel will be received in this section.
- 6- Note the **Orders At A Glance** region of the screen. This region will always contain the five most recent purchase orders for immediate review, showing **PO Number, Description, and Order Date**.



PO Number	Description	Order Date
<a href="#">13000334</a>		10/09/2013 08:42:37
<a href="#">13000332</a>		10/08/2013 20:52:06
<a href="#">13000326</a>		10/08/2013 14:19:30
<a href="#">13000290</a>		10/07/2013 12:52:12
<a href="#">13000289</a>		10/07/2013 12:51:44

All purchase orders can be reviewed in **detail** from this region of the screen.

- 7- Click the **link** for the **PO Number** as indicated to drill down to the additional summary information.



**Order Information**

**General**  
 Total: 200.00  
 Supplier: INDUSTRIAL SAFETY PRODUCTS  
 Supplier Site: 01  
 Address: 6091 CAREY DR, VALLEY VIEW, OH 44125  
 Buyer: [Shomon, Linda E](#)  
 Order Date: 10/09/2013 08:42:37  
 Description: TEST TO SEE IF WILL GO OVER TO EBS  
 Status: Open  
 Note to Supplier: NEORSD LE  
 Sourcing Document:  
 Supplier Order Number:  
 Attachments: None

**Terms and Conditions**  
 Payment Terms: NET 30 DAYS  
 Carrier:  
 FOB: DESTINATION  
 Freight Terms: DELIVERED  
 Shipping Control:

**Ship-To Address**  
 Address: 6000 Canal Rd, Cuyahoga Heights, OH 44125

**Bill-To Address**  
 Address: 3900 Euclid Ave, Cleveland, OH 44115

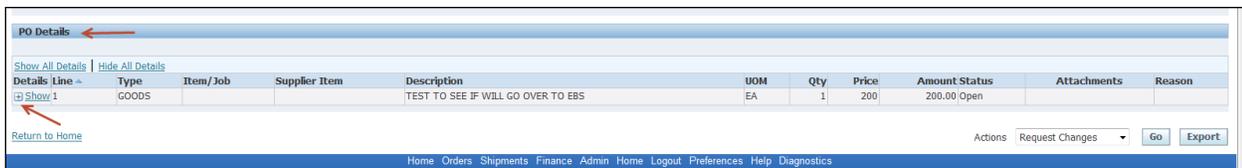
**Summary**  
 Total: 200.00  
 Received: 0.00  
 Invoiced: 0.00  
 Payment Status: Not Paid

**PO Details**

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount Status	Attachments	Reason
<a href="#">Show</a> 1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00 Open		

The **Order Information** window is displayed.

- 8- Note the **Summary** information for the order.
- 9- Note the additional information shown, including **Buyer** and **Order Status**.



**PO Details**

[Show All Details](#) | [Hide All Details](#)

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount Status	Attachments	Reason
<a href="#">Show</a> 1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00 Open		

[Return to Home](#)

The **PO Details** region of the window shows summary information for each line of the order.

- 10- Click the **Show** link to view additional shipment details for the order line.

# iSupplier Training Guide

PO Details															
<a href="#">Show All Details</a>   <a href="#">Hide All Details</a>															
Details: Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason				
Hide 1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00	Open						
<b>Shipments</b> ←															
Shipment	Ship-To Location	Ordered	Qty Received	Amount Invoiced	Ordered	Amount Received	Invoiced	Promised Date	Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
1	<a href="#">Southerly Internal Location</a>	1		200.00				10/30/2013 00:00:00	10/30/2013 00:00:00		Open				
<a href="#">Return to Home</a> ←															
Actions: Request Changes ▾ <input type="button" value="Go"/> <input type="button" value="Export"/>															
Home Orders Shipments Finance Admin Home Logout Preferences Help Diagnostics															

The **Shipments** detail is shown, including the **Ship-To Location**, **Ordered Quantity**, **Promised Date**, **Need-By Date**, and **Status**.

11- Click the **Return to Home** link to return to the main page.

## Topic 2: iSupplier Home Page – Orders Tab

iSupplier portal users will have direct access to summary and detail information related to orders through the **Orders** tab. This tab also provides links to additional information pertaining to orders, including **PO Changes** and **Agreements**.

This topic covers:

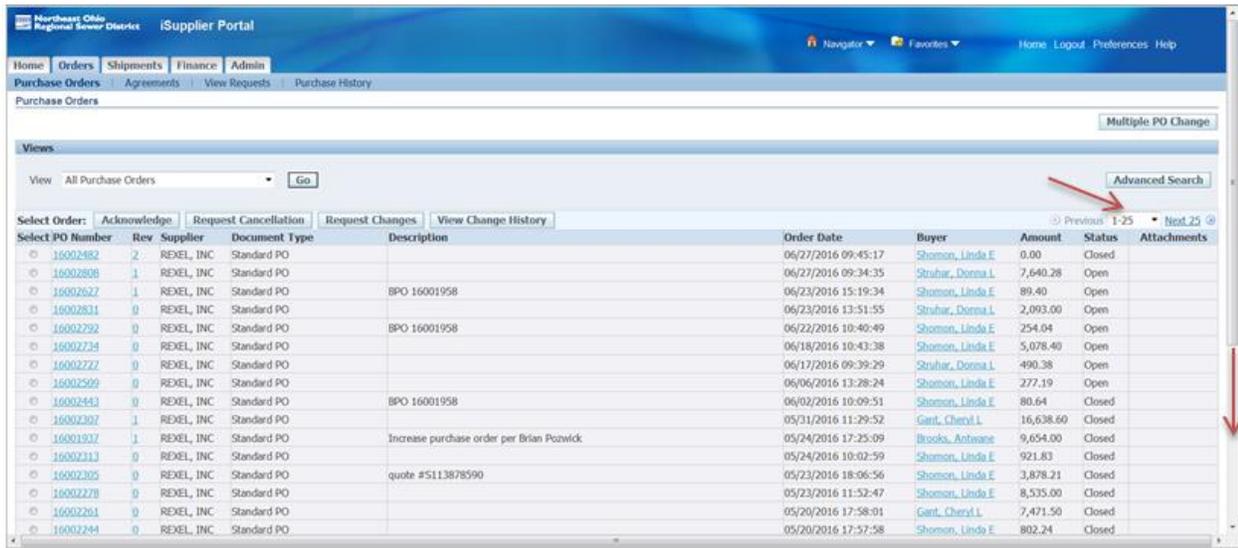
- Overview of the Orders tab and summary information
- Review of views related to Purchase Orders
- Access to Purchase Agreements information

### Orders Tab – Summary Information



The **Home Page** is displayed.

- 1- Click on the **Orders** tab.

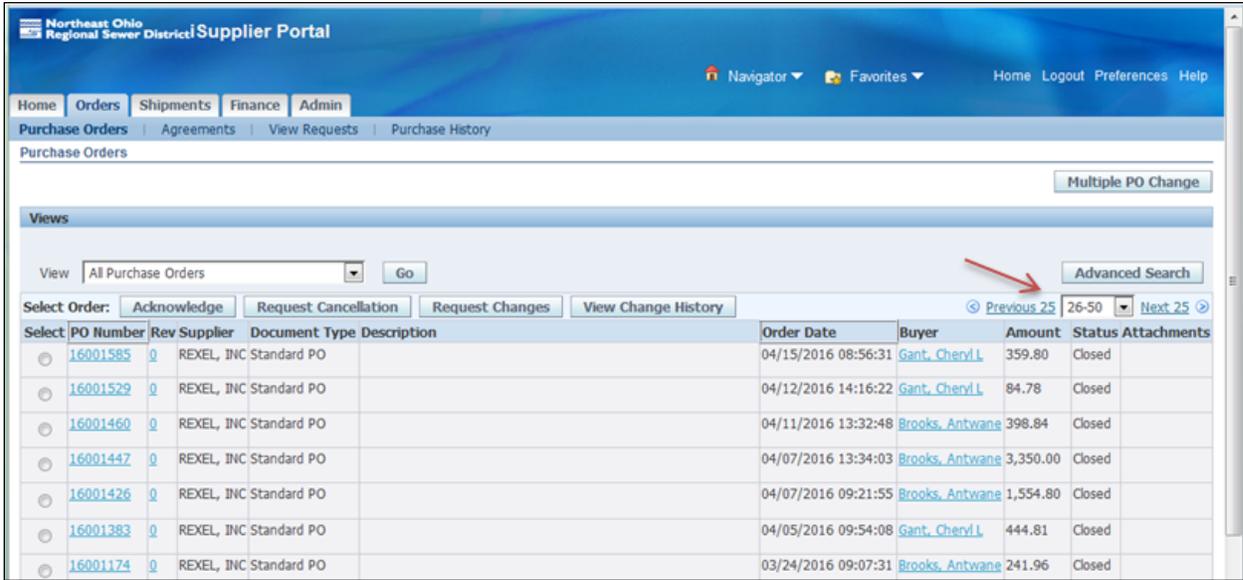


Select PO Number	Rev	Supplier	Document Type	Description	Order Date	Buyer	Amount	Status	Attachments
16002482	2	REXEL, INC	Standard PO		06/27/2016 09:45:17	Shomon, Linda E	0.00	Closed	
16002808	1	REXEL, INC	Standard PO		06/27/2016 09:34:35	Strubar, Donna L	7,640.28	Open	
16002627	1	REXEL, INC	Standard PO	BPO 16001958	06/23/2016 15:19:34	Shomon, Linda E	89.40	Open	
16002831	0	REXEL, INC	Standard PO		06/23/2016 13:51:55	Strubar, Donna L	2,093.00	Open	
16002292	0	REXEL, INC	Standard PO	BPO 16001958	06/22/2016 10:40:49	Shomon, Linda E	254.04	Open	
16002734	0	REXEL, INC	Standard PO		06/18/2016 10:43:38	Shomon, Linda E	5,078.40	Open	
16002222	0	REXEL, INC	Standard PO		06/17/2016 09:39:29	Strubar, Donna L	490.38	Open	
16002509	0	REXEL, INC	Standard PO		06/06/2016 13:28:24	Shomon, Linda E	277.19	Open	
16002443	0	REXEL, INC	Standard PO	BPO 16001958	06/02/2016 10:09:51	Shomon, Linda E	80.64	Closed	
16002207	1	REXEL, INC	Standard PO		05/31/2016 11:29:52	Gant, Cheryl L	16,638.60	Closed	
16001932	1	REXEL, INC	Standard PO	Increase purchase order per Brian Pozwick	05/24/2016 17:25:09	Brooks, Antwanne	9,654.00	Closed	
16002113	0	REXEL, INC	Standard PO		05/24/2016 10:02:59	Shomon, Linda E	921.83	Closed	
16002305	0	REXEL, INC	Standard PO	quote #S113878590	05/23/2016 18:06:56	Shomon, Linda E	3,878.21	Closed	
16002278	0	REXEL, INC	Standard PO		05/23/2016 11:52:47	Shomon, Linda E	8,535.00	Closed	
16002261	0	REXEL, INC	Standard PO		05/20/2016 17:58:01	Gant, Cheryl L	7,471.50	Closed	
16002244	0	REXEL, INC	Standard PO		05/20/2016 17:57:58	Shomon, Linda E	802.24	Closed	

The **Purchase Orders** window is displayed. This window contains all purchase orders. Note the **links** for drilldown to each **PO Number** listed. The window displays 25 order listings at a time.

- 2- Use the **vertical scroll bar** to scroll down the list.
- 3- Click on the **Next 25** link to view the additional listings.

# iSupplier Training Guide



Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

Purchase Orders | Agreements | View Requests | Purchase History

Purchase Orders Multiple PO Change

Views

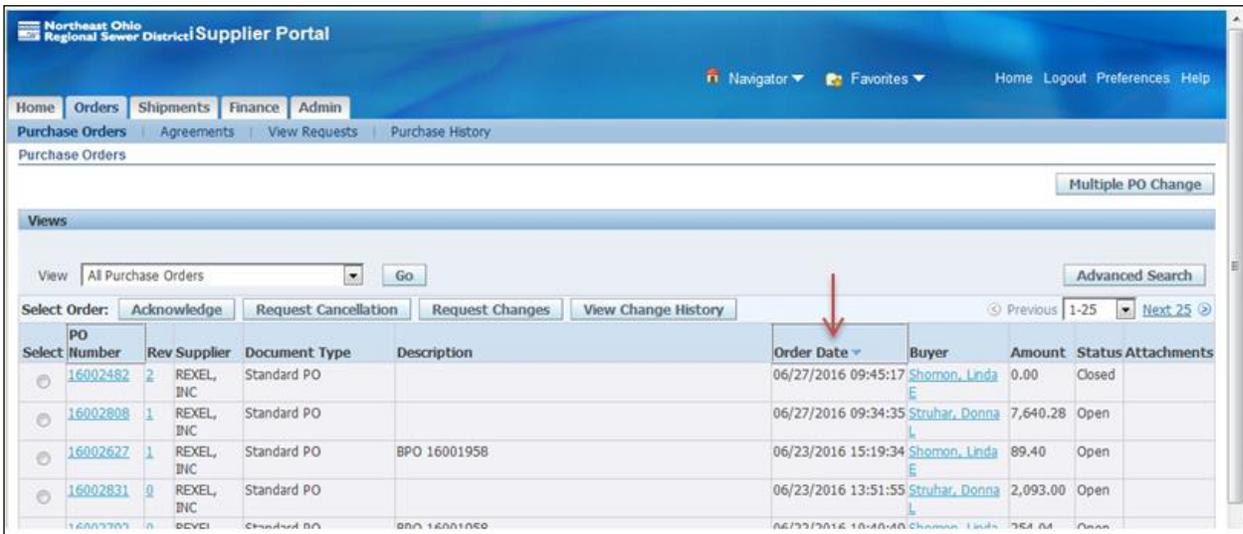
View: All Purchase Orders Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History Previous 25 26-50 Next 25

Select	PO Number	Rev Supplier	Document Type	Description	Order Date	Buyer	Amount	Status	Attachments
<input type="radio"/>	16001585	0 REXEL, INC	Standard PO		04/15/2016 08:56:31	Gant, Cheryl L	359.80	Closed	
<input type="radio"/>	16001529	0 REXEL, INC	Standard PO		04/12/2016 14:16:22	Gant, Cheryl L	84.78	Closed	
<input type="radio"/>	16001460	0 REXEL, INC	Standard PO		04/11/2016 13:32:48	Brooks, Antwane	398.84	Closed	
<input type="radio"/>	16001447	0 REXEL, INC	Standard PO		04/07/2016 13:34:03	Brooks, Antwane	3,350.00	Closed	
<input type="radio"/>	16001426	0 REXEL, INC	Standard PO		04/07/2016 09:21:55	Brooks, Antwane	1,554.80	Closed	
<input type="radio"/>	16001383	0 REXEL, INC	Standard PO		04/05/2016 09:54:08	Gant, Cheryl L	444.81	Closed	
<input type="radio"/>	16001174	0 REXEL, INC	Standard PO		03/24/2016 09:07:31	Brooks, Antwane	241.96	Closed	

The window is refreshed to display the next 25 records.

- 4- Click on the **Previous 25** link to view the previous listings.



Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

Purchase Orders | Agreements | View Requests | Purchase History

Purchase Orders Multiple PO Change

Views

View: All Purchase Orders Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History Previous 1-25 Next 25

Select	PO Number	Rev Supplier	Document Type	Description	Order Date	Buyer	Amount	Status	Attachments
<input type="radio"/>	16002482	2 REXEL, INC	Standard PO		06/27/2016 09:45:17	Shomon, Linda E	0.00	Closed	
<input type="radio"/>	16002808	1 REXEL, INC	Standard PO		06/27/2016 09:34:35	Struhar, Donna L	7,640.28	Open	
<input type="radio"/>	16002627	1 REXEL, INC	Standard PO	BPO 16001958	06/23/2016 15:19:34	Shomon, Linda E	89.40	Open	
<input type="radio"/>	16002831	0 REXEL, INC	Standard PO		06/23/2016 13:51:55	Struhar, Donna L	2,093.00	Open	

The order information is listed in sequence by the latest **Order Date**.

- 5- Click the indicator next to **Order Date** to reverse the sequence.

The order information is now listed in sequence by the earliest **Order Date**.

- 6- Click the indicator next to **Order Date** again to return to the original sequence.

## Utilizing Purchase Order View



Purchase Orders

Multiple PO Change Export

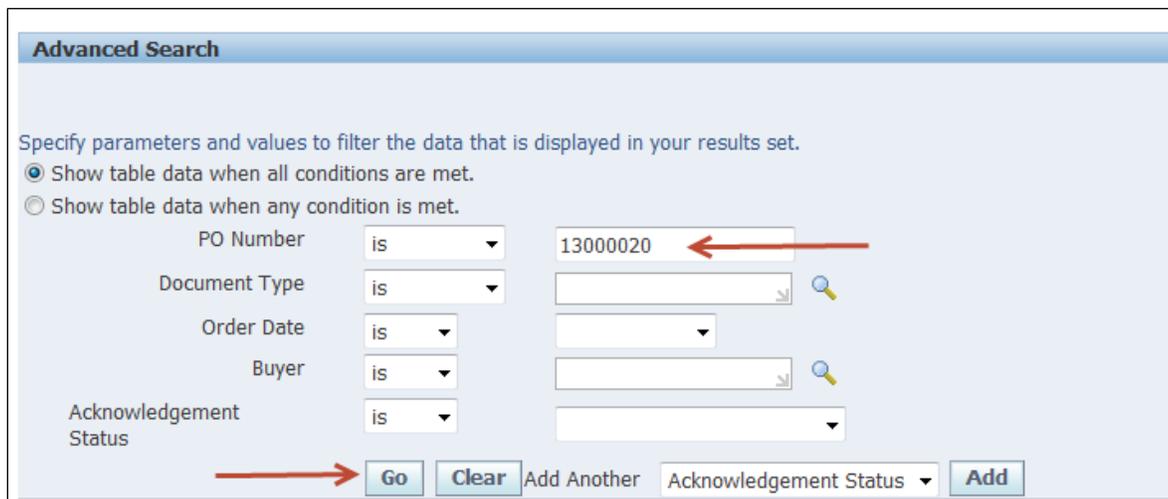
Views

View: All Purchase Orders Go

Advanced Search

Use the **View** function to narrow the order search.

- 1- Click the **Advanced Search** button.



**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 13000020

Document Type is

Order Date is

Buyer is

Acknowledgement Status is

Go Clear Add Another Acknowledgement Status Add

The **Advanced Search** window is displayed. Note the multiple **parameters** available for search.

- 2- Enter a specific value in the **PO Number** field.
- 3- Click the **Go** button to execute the search.



**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 13000020

Document Type is

Order Date is

Buyer is

Acknowledgement Status is

Go Clear Add Another Acknowledgement Status Add

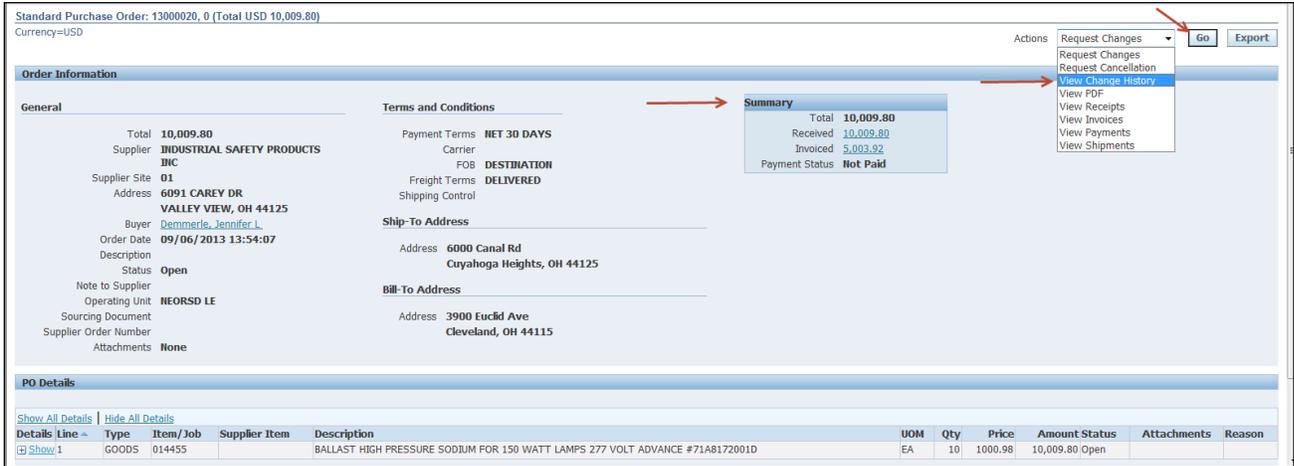
Select Order: Acknowledge Request Cancellation Request Changes View Change History

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input checked="" type="radio"/>	13000020	0	NEORSO LE	Standard PO		09/06/2013 13:54:07	Jemmerle, Jennifer L	USD	10,009.80	Open		

Search results are displayed.

- 4- Click the **link** under **PO Number** to view additional information for the order.

# iSupplier Training Guide



Standard Purchase Order: 13000020\_0 (Total USD 10,009.80)  
Currency=USD

**Order Information**

General

Total **10,009.80**  
Supplier **INDUSTRIAL SAFETY PRODUCTS**  
Supplier Site **IIC**  
Supplier Site **01**  
Address **6091 CAREY DR**  
**VALLEY VIEW, OH 44125**  
Buyer **Demmerle, Jennifer L.**  
Order Date **09/06/2013 13:54:07**  
Description  
Status **Open**  
Note to Supplier  
Operating Unit **NEORS D LE**  
Sourcing Document  
Supplier Order Number  
Attachments **None**

Terms and Conditions

Payment Terms **NET 30 DAYS**  
Carrier  
FOB **DESTINATION**  
Freight Terms **DELIVERED**  
Shipping Control

**Summary**

Total **10,009.80**  
Received **10,009.80**  
Invoiced **5,003.92**  
Payment Status **Not Paid**

Ship-To Address

Address **6000 Canal Rd**  
**Cuyahoga Heights, OH 44125**

Bill-To Address

Address **3900 Euclid Ave**  
**Cleveland, OH 44115**

**PO Details**

Show All Details | Hide All Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Show 1	GOODS	014455		BALLAST HIGH PRESSURE SODIUM FOR 150 WATT LAMPS 277 VOLT ADVANCE #71A8172001D	EA	10	1000.98	10,009.80	Open		

The **Order Information** window is displayed. Note the **Actions** box with multiple options for viewing additional information related to the order.

- 5- Select the **View Change History** value.
- 6- Click the **Go** button.



Orders: Purchase Orders > View Order Details >  
Change History for Order  
Currency=USD

Indicates new values  
Indicates cancellation

Details Request Date	Line	Shipment	Item	Supplier Item	Description	Qty	Price / UOM	Rate	Amount	Date	Need-By Date	Start Date	End Date	Supplier Order Number	Supplier Order Line Number	Additional Changes	Cancellation Split Request	Response
No results found.																		

Return to View Order Details

Home Orders Shipments Finance Admin Home Logout Preferences Diagnostics

About this Page Privacy Statement Copyright (c) 2005, Oracle. All rights reserved.

All **Change Order** history is displayed for the order.

- 7- Click the **Ok** button to close the window.



Standard Purchase Order: 13000020\_0 (Total USD 10,009.80)  
Currency=USD

**Order Information**

General

Total **10,009.80**  
Supplier **INDUSTRIAL SAFETY PRODUCTS**  
Supplier Site **IIC**  
Supplier Site **01**  
Address **6091 CAREY DR**  
**VALLEY VIEW, OH 44125**

Terms and Conditions

Payment Terms **NET 30 DAYS**  
Carrier  
FOB **DESTINATION**  
Freight Terms **DELIVERED**  
Shipping Control

**Summary**

Total **10,009.80**  
Received **10,009.80**  
Invoiced **5,003.92**  
Payment Status **Not Paid**

Ship-To Address

Address **6000 Canal Rd**  
**Cuyahoga Heights, OH 44125**

Bill-To Address

Address **3900 Euclid Ave**  
**Cleveland, OH 44115**

**Actions**

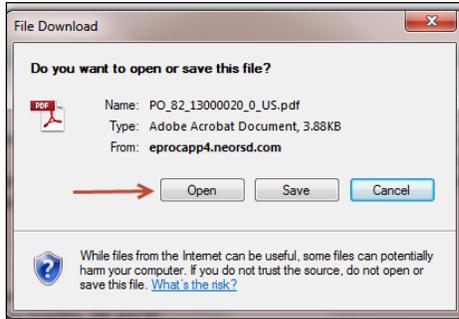
- Request Changes
- Request Changes
- Request Cancellation
- View Change History
- View PDF**
- View Receipts
- View Invoices
- View Payments
- View Shipments

Go Export

Returning to the **Actions** box:

- 8- Select the **View PDF** value.
- 9- Click the **Go** button.

# iSupplier Training Guide



The **File Download** window is displayed.  
10- Click the **Open** button.



**NEORSD LE**  
3900 Euclid Ave  
Cleveland, OH 44115  
(216) 881- 6600

Supplier: **REXEL, INC**  
01  
30310 EMERALD VALLEY PKWY  
SOLON, OH 44139

Ship To: See below

Bill To: 3900 Euclid Ave  
Cleveland, OH 44115

Standard Purchase Order 16002627, 1

Type	Standard Purchase Order
Order	16002627
Revision	1
Order Date	13-JUN-2016
Revision Date	23-JUN-2016
Buyer	Shomon, Linda
Buyer Email	shomonl@neorsd.org
PO Description	BPO 16001958

Confirming Order:	Supplier No.	Payment Terms	Freight Terms	FOB	State Contract	Ship Via
No	01854	NET 30 DAYS	PREPAID & ADD	DESTINATION		

**Note to Supplier:**

Line	Part Number / Description	Contract - Line	Quantity	UOM	Unit Price (USD)	Amount (USD)
1	017772 BATTERY, RECHARGEABLE 12V 5 Ah SLA, POWERSONIC PS-1250 FI	16001958 - 9	6	EA	14.9000	\$89.40
Need By Date: 28-JUN-2016      Ship To: EMSC Internal Location Requestor: Kovalchuk, Nazariy      4747 East 49th St Supplier Part#:      Cuyahoga Heights, OH 44125						
<b>Total:</b>						<b>\$89.40 (USD)</b>

Please reference the above Purchase Order Number on all Invoices

It is hereby certified that the amount requested to meet the contract, agreement, obligation, payment or expenditure, for the above, has been lawfully appropriated or authorized or directed for such purpose and is in the Treasury or in the process of collection free from any obligation or certification now outstanding.

Authorized Signature: 

Chief Finance Officer, NEORSD

Proprietary and Confidential
1 of 2

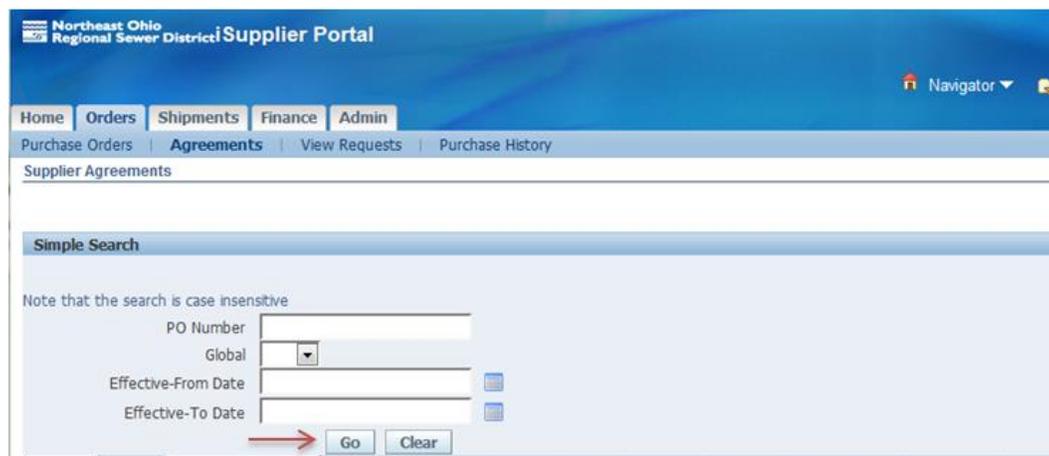
A **PDF** copy of the order is displayed. Use this copy for printing or save to desktop.  
11- Use the **File>Exit** command to exit from the PDF document.

## Viewing Order Agreements

Supplier purchase agreements with NEORSR can be viewed in detail through the **link** under the **Orders** tab.



1- Click the **Agreements** link.



The **Supplier Agreements** window is displayed. Use this window to search for agreements using multiple criteria.

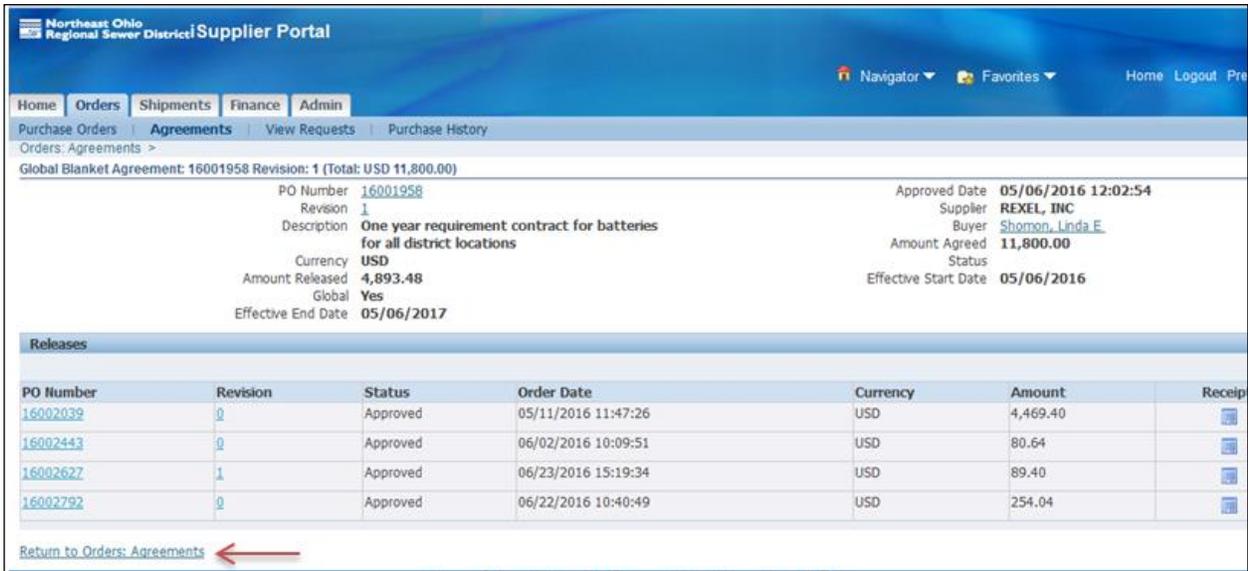
2- To search for **all** Agreements, click the **Go** button.

PO Number	Revision	Global	Description	Buyer	Order Date	Currency	Amount Agreed	Amount Released	Effective-From Date	Effective-To Date	Status	Attachments	Upload Status
13000212	0	Yes	sfsv	Demmerle, Jennifer L	09/30/2013 16:48:37	USD	1,000.00		09/30/2013	10/12/2013	Open		
13000195	0	Yes	vfsd;kvlsdvl	Demmerle, Jennifer L	09/27/2013 10:13:02	USD	10,000.00				Open		
13000192	0	Yes	sdvsdv	Demmerle, Jennifer L	09/26/2013 16:38:44	USD		100.00			Open		
13000029	0	Yes	test	Demmerle, Jennifer L	09/09/2013 13:15:23	USD	10,000.00	201.96	09/09/2013		Open		
13013	0	Yes	(WAM BPO) INV CONTROL - INDUSTRIAL GLOVES TWO-YEAR REQUIREMENT OR UNTIL APPROPRIATED FUNDS HAVE BEEN EXHAUSTED NO QUOTES REQUIRED	Shomon, Linda E	09/04/2013 16:28:01	USD	24,579.58		03/06/2013	03/08/2015	Open		

The search results are displayed.

3- To view a specific Agreement, click the **link** under the **PO Number** column.

# iSupplier Training Guide



Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

Purchase Orders | **Agreements** | View Requests | Purchase History

Orders: Agreements >

Global Blanket Agreement: 16001958 Revision: 1 (Total: USD 11,800.00)

PO Number	16001958	Approved Date	05/06/2016 12:02:54
Revision	1	Supplier	REXEL, INC
Description	One year requirement contract for batteries for all district locations	Buyer	Shomon, Linda E.
Currency	USD	Amount Agreed	11,800.00
Amount Released	4,893.48	Status	
Global	Yes	Effective Start Date	05/06/2016
Effective End Date	05/06/2017		

**Releases**

PO Number	Revision	Status	Order Date	Currency	Amount	Receipt
<a href="#">16002039</a>	<a href="#">0</a>	Approved	05/11/2016 11:47:26	USD	4,469.40	
<a href="#">16002443</a>	<a href="#">0</a>	Approved	06/02/2016 10:09:51	USD	80.64	
<a href="#">16002627</a>	<a href="#">1</a>	Approved	06/23/2016 15:19:34	USD	89.40	
<a href="#">16002792</a>	<a href="#">0</a>	Approved	06/22/2016 10:40:49	USD	254.04	

[Return to Orders: Agreements](#) ←

Detail information for the Agreement is displayed, including all **Releases** associated with the Agreement.  
4- Click the **Return to Orders, Agreements** link.



Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

Purchase Orders | **Agreements** | View Requests | Purchase History

Supplier Agreements

Simple Search

The **Supplier Agreements** window is displayed.  
5- Click the **Home** tab to return to the main portal page.

### Topic 3: iSupplier Home Page – Shipments Tab

iSupplier portal users will have direct access to multiple levels of shipment information through the **Shipments** tab. This tab also provides links to additional information pertaining to shipments, including **Receipts, Returns, and Performance**.

This topic covers:

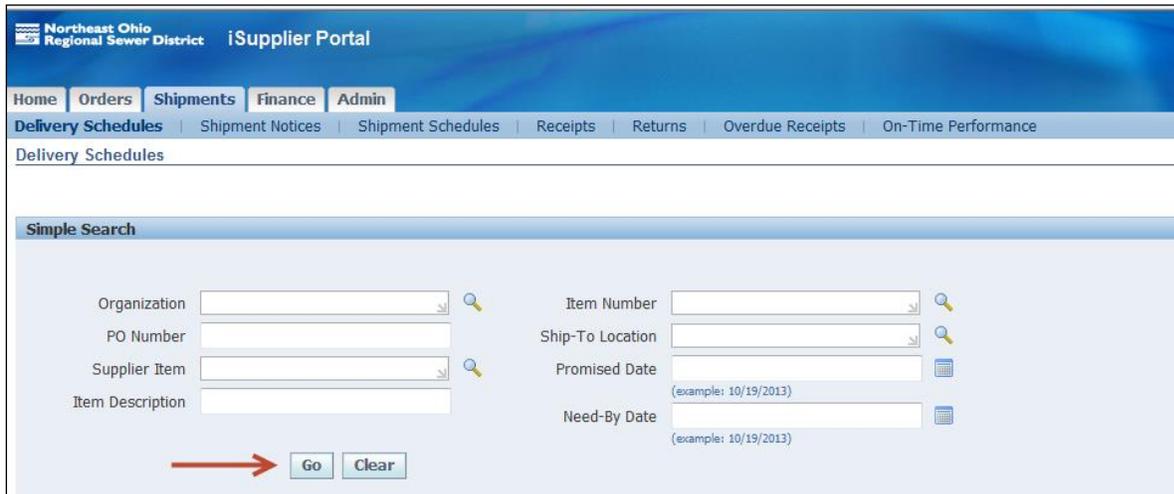
- Overview of the Shipments tab and summary information
- Review of Shipment Receipts details
- Review of Shipment Returns details
- Review of Overdue Receipts details
- Review of On-Time Performance metrics

#### Shipments Tab – Summary Information



The **Home Page** is displayed.

- 1- Click on the **Shipments** tab.



The **Delivery Schedules** window is the default window displayed under this tab. Use this window to search for delivery schedule information using multiple criteria.

- 2- To search for **all** delivery schedules, click the **Go** button.

# iSupplier Training Guide

Home | Orders | Shipments | Finance | Admin

Delivery Schedules | Shipment Notices | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

Delivery Schedules Export

**Simple Search** Advanced Search

Organization:  Item Number:   
 PO Number:  Ship-To Location:   
 Supplier Item:  Promised Date:  (example: 10/19/2013)  
 Item Description:  Need-By Date:  (example: 10/19/2013)

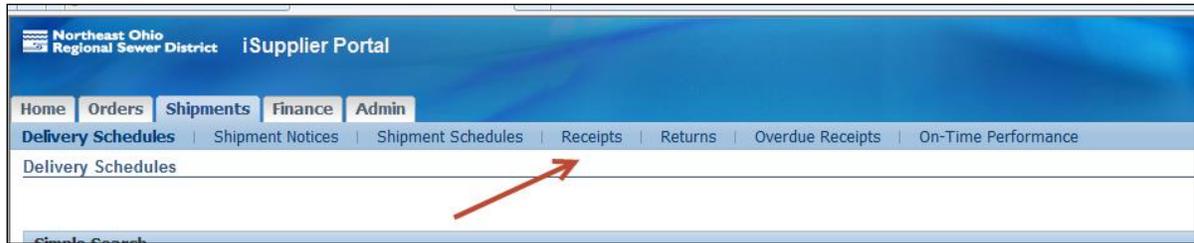
Previous 1-25 Next 25

Organization	PO Number	Supplier Item	Item Description	Quantity UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier Number	Supplier Config ID	Supplier	Supplier Location	Promised Date	Need-By Date
NEORSO LE	13000008		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	GL	5	0	<a href="#">EMSC Internal Location</a>	010020		INDUSTRIAL SAFETY PRODUCTS INC	01		09/24/2013 17:00:00
NEORSO LE	13000008		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	GL	5	0	<a href="#">Field Office E 40th Street</a>	010020		INDUSTRIAL SAFETY PRODUCTS INC	01		09/24/2013 17:00:00
NEORSO LE	13000334		TEST TO SEE IF WILL GO OVER TO EBS	EA	1	0	<a href="#">Southerly Internal Location</a>			INDUSTRIAL SAFETY PRODUCTS INC	01	10/30/2013 00:00:00	10/30/2013 00:00:00
NEORSO LE	13000289		hsfohoiusdhviusdhvi	EA	1	0	<a href="#">Easterly Internal Location</a>			INDUSTRIAL SAFETY PRODUCTS INC	01	10/12/2013 00:00:00	10/12/2013 00:00:00
NEORSO LE	13000235		ewippejwvwevnbvai eoi vjeoif	EA	1	0	<a href="#">Easterly Internal Location</a>			INDUSTRIAL SAFETY PRODUCTS INC	01	10/02/2013 00:00:00	10/02/2013 00:00:00
NEORSO LE	13000234		lsnknalkjynkjasnvwkj	EA	1	0	<a href="#">Easterly Internal Location</a>			INDUSTRIAL SAFETY PRODUCTS INC	01	10/02/2013 00:00:00	10/02/2013 00:00:00
NEORSO LE	13000217		sfsfgdsfdfsdf	EA	1	0	<a href="#">Easterly Internal Location</a>			INDUSTRIAL SAFETY PRODUCTS INC	01	10/01/2013 00:00:00	10/01/2013 00:00:00

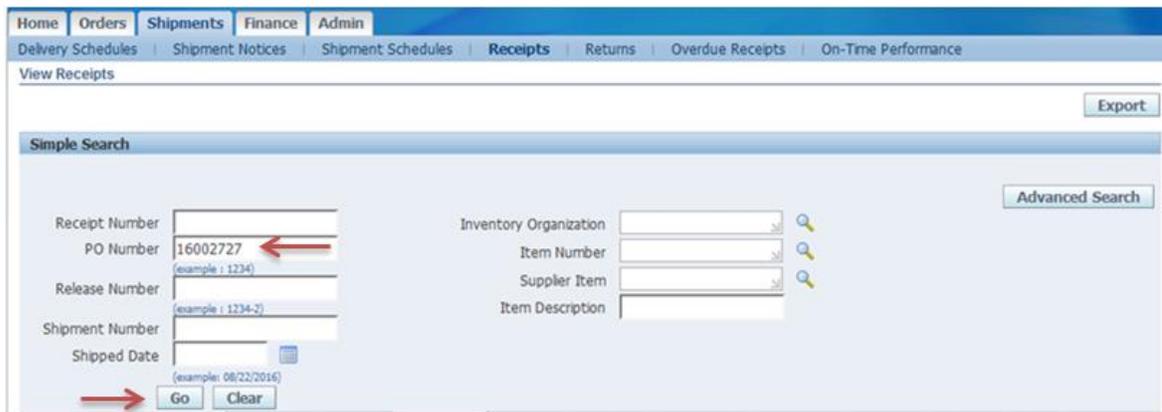
The **Delivery Schedules** window shows search results in summary.

- 3- Note the multiple fields of information, included comparison of **Promised Date** and **Need-By Date**.

## Shipment Receipt Details



- 1- Click the **Receipts** link under the **Shipments** tab.

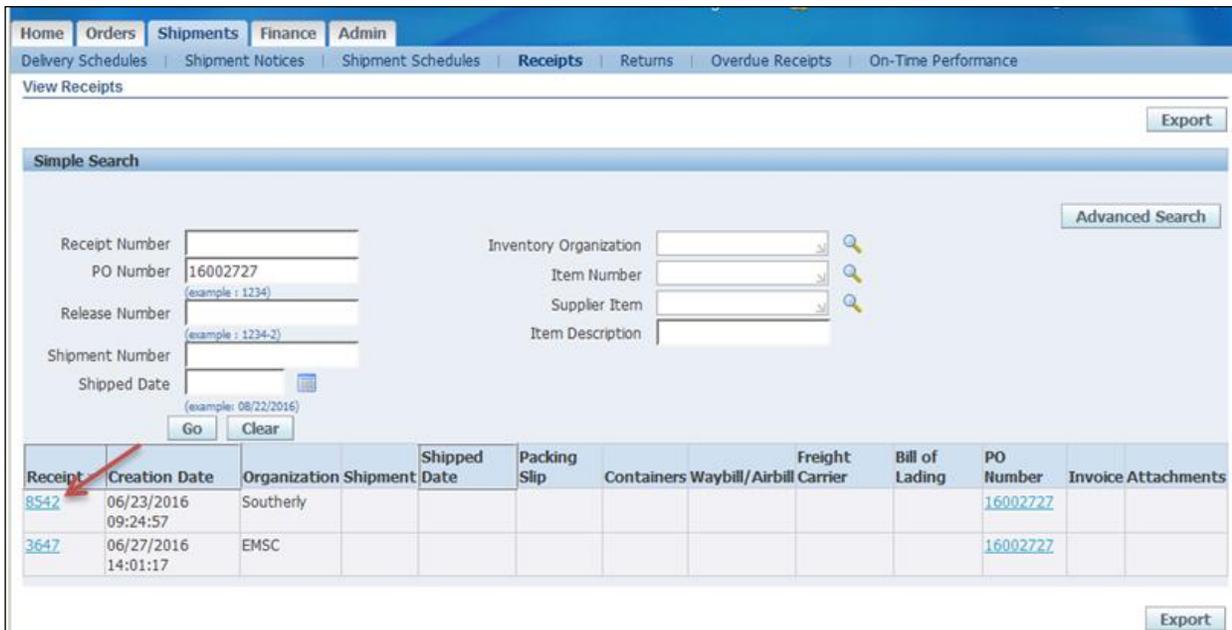


The screenshot shows the View Receipts search form. The Receipts link is highlighted in the navigation bar. Below the navigation bar, there is a section for View Receipts with an Export button. Below this, there is a Simple Search section with an Advanced Search button. The search form includes fields for Receipt Number, PO Number (with a red arrow pointing to the input field containing '16002727'), Release Number, Shipment Number, Shipped Date, Inventory Organization, Item Number, Supplier Item, and Item Description. There are also Go and Clear buttons at the bottom.

The **View Receipts** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.

# iSupplier Training Guide



Home Orders Shipments Finance Admin  
Delivery Schedules | Shipment Notices | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

View Receipts Export

**Simple Search** Advanced Search

Receipt Number:   
 PO Number: 16002727 (example: 1234)  
 Release Number:   
 Shipment Number:   
 Shipped Date:  (example: 08/22/2016)

Inventory Organization:   
 Item Number:   
 Supplier Item:   
 Item Description:

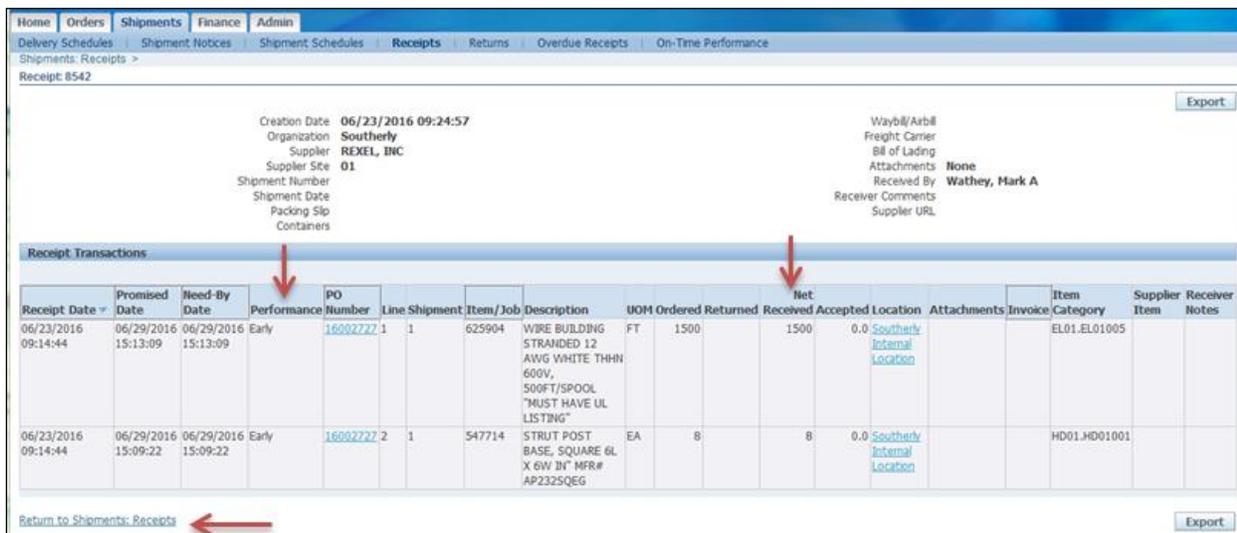
Go Clear

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice Attachments
<a href="#">8542</a>	06/23/2016 09:24:57	Southerly								<a href="#">16002727</a>	
<a href="#">3647</a>	06/27/2016 14:01:17	EMSC								<a href="#">16002727</a>	

Export

Search results are displayed.

- 4- Click the link for the **Receipt** to view detail information.



Home Orders Shipments Finance Admin  
Delivery Schedules | Shipment Notices | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

Shipments: Receipts >  
Receipt: 8542 Export

Creation Date: 06/23/2016 09:24:57  
 Organization: Southerly  
 Supplier: REXEL, INC  
 Supplier Site: 01  
 Shipment Date:   
 Packing Slip:   
 Containers:   
 Waybill/Airbill:   
 Freight Carrier:   
 Bill of Lading:   
 Attachments:   
 Received By: None  
 Receiver Comments: Wathey, Mark A  
 Supplier URL:

**Receipt Transactions**

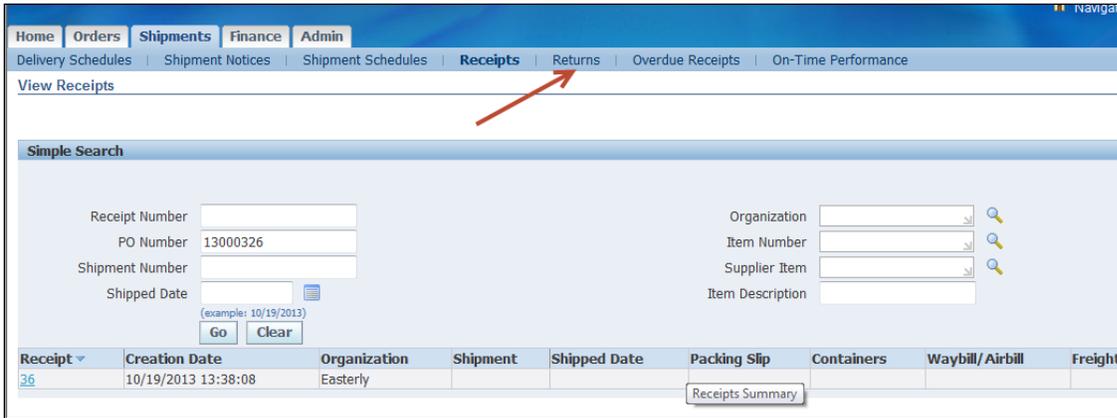
Receipt Date	Promised Date	Need-By Date	Performance	PO Number	Line	Shipment	Item/Job	Description	UOM	Ordered	Returned	Net Received	Accepted	Location	Attachments	Invoice	Item Category	Supplier Item	Receiver Notes
06/23/2016 09:14:44	06/29/2016 15:13:09	06/29/2016 15:13:09	Early	<a href="#">16002727</a>	1	1	625904	WIRE BUILDING STRANDED 12 AWG WHITE THHN 600V, 500FT/SPOOL "MUST HAVE UL LISTING"	FT	1500		1500	0.0	<a href="#">Southerly Internal Location</a>			EL01.EL01005		
06/23/2016 09:14:44	06/29/2016 15:09:22	06/29/2016 15:09:22	Early	<a href="#">16002727</a>	2	1	547714	STRUT POST BASE, SQUARE 6L X 6W IN" MFR# AP232SQEG	EA	8		8	0.0	<a href="#">Southerly Internal Location</a>			HD01.HD01001		

Return to Shipments: Receipts Export

Detail information for the receipt is displayed. Note the inclusion of **Performance** and **Net Received** information for the receipt.

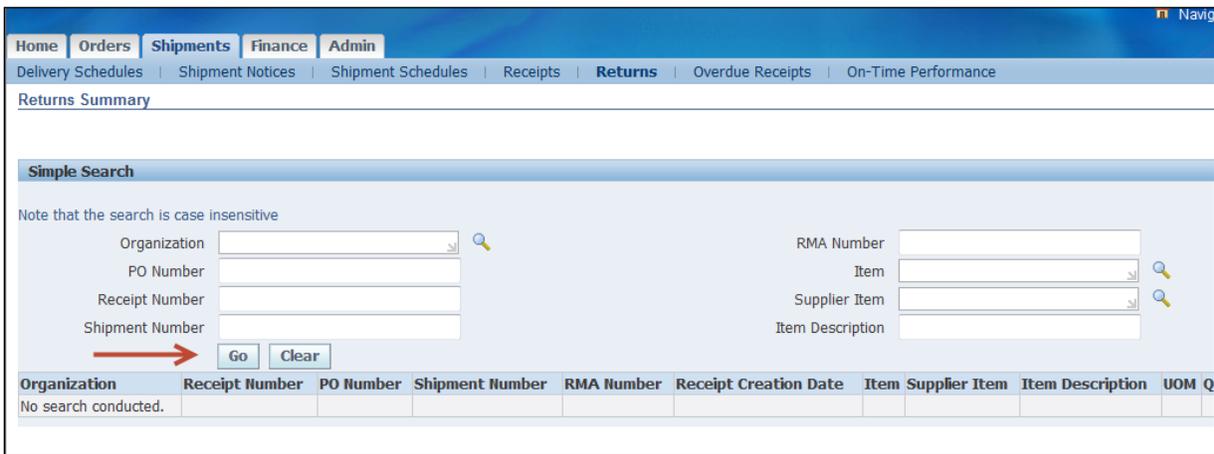
- 5- Click the **Return to Shipments: Receipts** link.

## Shipment Returns Detail



The screenshot shows the iSupplier interface with the 'Shipments' tab selected. Underneath, the 'Returns' link is highlighted with a red arrow. The interface includes a navigation bar with 'Home', 'Orders', 'Shipments', 'Finance', and 'Admin'. Below the navigation bar, there are links for 'Delivery Schedules', 'Shipment Notices', 'Shipment Schedules', 'Receipts', 'Returns', 'Overdue Receipts', and 'On-Time Performance'. A 'View Receipts' link is also visible. The main content area features a 'Simple Search' section with input fields for Receipt Number, PO Number (13000326), Shipment Number, Shipped Date, Organization, Item Number, Supplier Item, and Item Description. There are 'Go' and 'Clear' buttons. Below the search fields is a table with columns: Receipt, Creation Date, Organization, Shipment, Shipped Date, Packing Slip, Containers, Waybill/Airbill, and Freight. A 'Receipts Summary' button is located at the bottom right of the table.

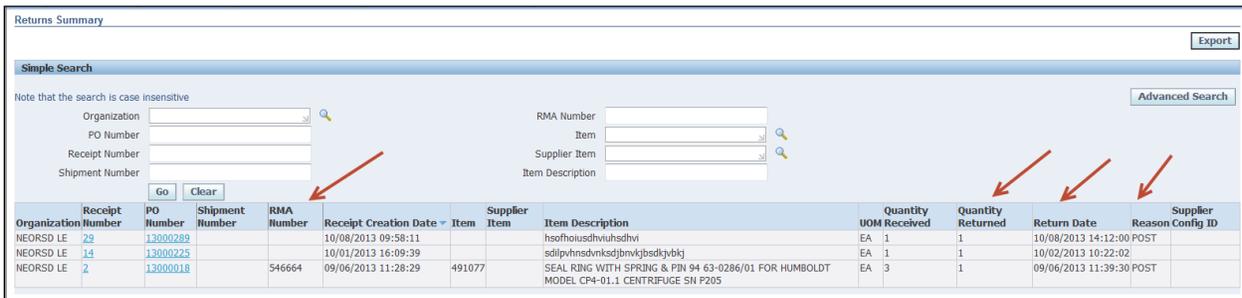
- 1- Click the **Returns** link under the **Shipments** tab.



The screenshot shows the 'Returns Summary' window. The 'Returns' link is now selected in the navigation bar. The 'Simple Search' section includes a note: 'Note that the search is case insensitive'. It has input fields for Organization, PO Number, Receipt Number, Shipment Number, RMA Number, Item, Supplier Item, and Item Description. There are 'Go' and 'Clear' buttons. Below the search fields is a table with columns: Organization, Receipt Number, PO Number, Shipment Number, RMA Number, Receipt Creation Date, Item, Supplier Item, Item Description, UOM, and Quantity. The table shows 'No search conducted.'

The **Returns Summary** window is displayed. Multiple search criteria are available for query.

- 2- To view **all** returns information, click the **Go** button.



The screenshot shows the search results for returns. The 'Go' button from the previous screen is highlighted with a red arrow. The table displays the following data:

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM	Quantity Received	Quantity Returned	Return Date	Reason	Supplier Config ID
NEORSO LE	29	13000289			10/08/2013 09:58:11			hsofholusshvuhshdhw	EA	1	1	10/08/2013 14:12:00	POST	
NEORSO LE	14	13000225			10/01/2013 16:09:39			sdljwvmsdnksdjlwvjsdtybbj	EA	1	1	10/02/2013 10:22:02		
NEORSO LE	2	13000018		546664	09/06/2013 11:28:29	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA	3	1	09/06/2013 11:39:30	POST	

In the search results, detail information for the return is displayed.

# iSupplier Training Guide



- Note the inclusion of RMA Number, Quantity Returned, Return Date, and Reason information for each return.

**Simple Search**

Note that the search is case insensitive Advanced Search

Organization  RMA Number

PO Number  Item

Receipt Number  Supplier Item

Shipment Number  Item Description

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	Quantity UOM Received	Quantity Returned	Return Date	Reason	Supplier Config ID
NEORS D LE	<a href="#">23</a>	13000289			10/08/2013 09:58:11			hsdfhoiusdthviusdhw	EA 1	1	10/08/2013 14:12:00	POST	
NEORS D LE	<a href="#">14</a>	13000225			10/01/2013 16:09:39			sdilpwhsdvnksdjbvnkjbsdjybkj	EA 1	1	10/02/2013 10:22:02		
NEORS D LE	<a href="#">2</a>	13000018		546664	09/06/2013 11:28:29	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA 3	1	09/06/2013 11:39:30	POST	

- Click the link for any Receipt Number to view detail information.

Shipments: Returns >

Receipt Transactions Export

Receipt Number	PO Number	Line	Shipment	Description	UOM	Ordered	Returned	Net Received	Defects	Location	Receipt Date	Promised Date	Need-By Date	Performance
<a href="#">2</a>	13000018	1	1	SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA	10	1.0	1		<a href="#">Westerly Internal Location</a>	09/06/2013 11:27:22	09/08/2013 17:00:00	09/08/2013 17:00:00	On-Time

[Return to Shipments: Returns](#) Export

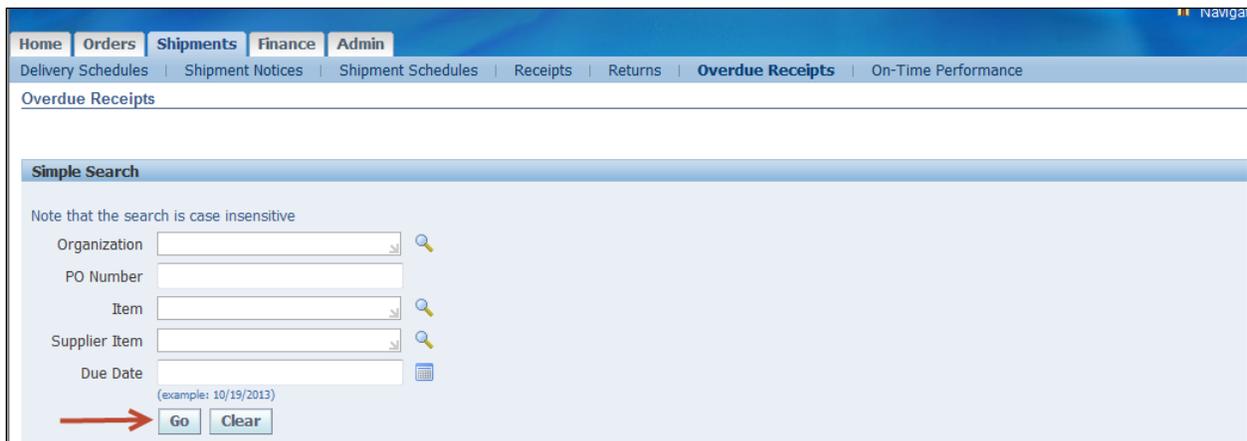
Detail information for the return is displayed.

- Click the **Return to Shipments, Returns** link.

## Overdue Receipts Detail

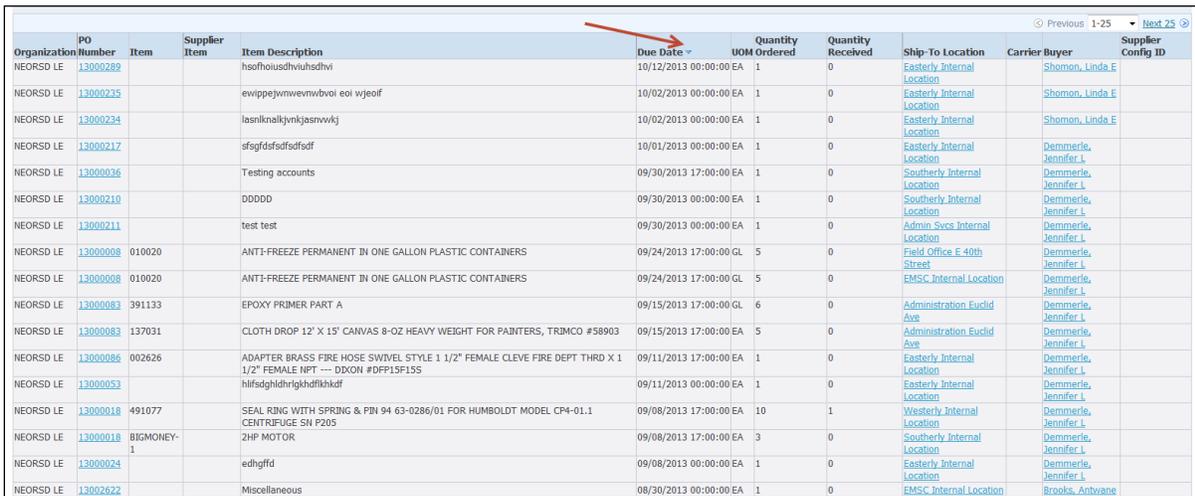


1- Click the **Overdue Receipts** link under the **Shipments** tab.



The **Overdue Receipts** window is displayed. Multiple search criteria are available for query.

2- To view **all** overdue receipts, click the **Go** button.



Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buyer	Supplier Config ID
NEORSO LE	13000289			hs0housdhvuhshdvi	10/12/2013 00:00:00	EA	1	0	Easterly Internal Location		Shomon, Linda E	
NEORSO LE	13000235			ewjpejyvmvewmbvovi eoi vrjeoif	10/02/2013 00:00:00	EA	1	0	Easterly Internal Location		Shomon, Linda E	
NEORSO LE	13000234			lasnlknaljkynkjasmnwkj	10/02/2013 00:00:00	EA	1	0	Easterly Internal Location		Shomon, Linda E	
NEORSO LE	13000217			sfqgfdsfdsfdfsdf	10/01/2013 00:00:00	EA	1	0	Easterly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000036			Testing accounts	09/30/2013 17:00:00	EA	1	0	Southerly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000210			DDDDD	09/30/2013 00:00:00	EA	1	0	Southerly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000211			test test	09/30/2013 00:00:00	EA	1	0	Admin Svcs Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000008	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00	GL	5	0	Field Office E 40th Street		Dammerle, Jennifer L	
NEORSO LE	13000008	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00	GL	5	0	EMSC Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000083	391133		EPOXY PRIMER PART A	09/15/2013 17:00:00	GL	6	0	Administration Euclid Ave		Dammerle, Jennifer L	
NEORSO LE	13000083	137031		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	EA	5	0	Administration Euclid Ave		Dammerle, Jennifer L	
NEORSO LE	13000086	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT --- DDON #DFP13F135	09/11/2013 17:00:00	EA	1	0	Easterly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000053			hlfsgldhrlgthdfkkhuf	09/11/2013 00:00:00	EA	1	0	Easterly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000018	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN F205	09/08/2013 17:00:00	EA	10	1	Westerly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000018	BIGMONEY-1		2HP MOTOR	09/08/2013 17:00:00	EA	3	0	Southerly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13000024			edhgffd	09/08/2013 00:00:00	EA	1	0	Easterly Internal Location		Dammerle, Jennifer L	
NEORSO LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	

Search results are listed by **PO Number**, with latest **Due Date** listed first.

# iSupplier Training Guide

3- Click the indicator next to **Due Date** to change the sequence.

Organization	PO Number	Item	Supplier Item	Item Description	Due Date -	Quantity Ordered	Quantity Received	Ship-To Location	Carrier Buyer	Supplier Config ID
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	4	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	6	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	6	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	6	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	1	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	2	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	2	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	
NEORSO LE	<a href="#">13002622</a>			Miscellaneous	08/30/2013 00:00:00 EA	4	0	<a href="#">EMSC Internal Location</a>	<a href="#">Brooks, Antwane</a>	

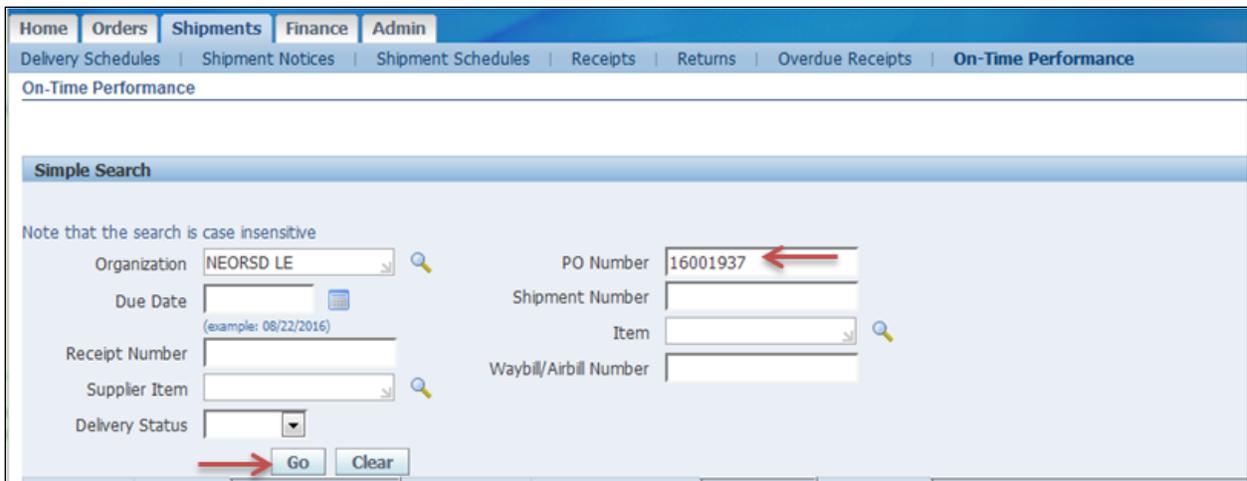
The listing now displays earliest **Due Date** listed first.

4- Click the indicator next to **Due Date** to return to the original sequence.

## On-Time Performance Detail



- 1- Click the **On-Time Performance** link under the **Shipments** tab.



Simple Search

Note that the search is case insensitive

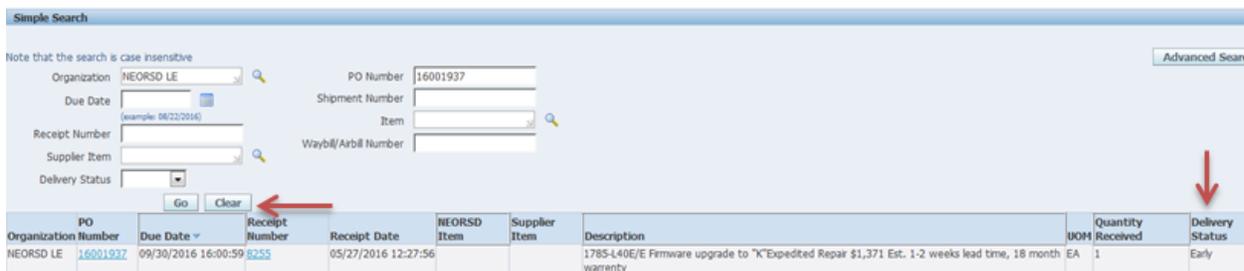
Organization: NEORS LE  
Due Date: [calendar icon]  
Receipt Number: [input field]  
Supplier Item: [input field]  
Delivery Status: [dropdown menu]

PO Number: 16001937  
Shipment Number: [input field]  
Item: [input field]  
Waybill/Airbill Number: [input field]

Go Clear

The **On-Time Performance** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.



Simple Search

Note that the search is case insensitive

Organization: NEORS LE  
Due Date: [calendar icon]  
Receipt Number: [input field]  
Supplier Item: [input field]  
Delivery Status: [dropdown menu]

PO Number: 16001937  
Shipment Number: [input field]  
Item: [input field]  
Waybill/Airbill Number: [input field]

Go Clear

Organization Number	PO Number	Due Date	Receipt Number	Receipt Date	NEORS Item	Supplier Item	Description	Quantity UOM Received	Delivery Status
NEORS LE	16001937	09/30/2016 16:00:59	8255	05/27/2016 12:27:56			1785-L40E/E Firmware upgrade to "C"Expedited Repair \$1,371 Est. 1-2 weeks lead time, 18 month warranty	EA 1	Early

Performance information for the specific PO is displayed. Note the inclusion of **Delivery Status**.

- 4- Click the **Clear** button to perform another search.

**On-Time Performance**

---

**Simple Search**

Note that the search is case insensitive

Organization   PO Number

Due Date   Shipment Number   
(example: 10/19/2013)

Receipt Number  Item  

Supplier Item   Waybill/Airbill Number

Delivery Status **Late**  



- 5- Select the **Late** value in the **Delivery Status** field.
- 6- Click the **Go** button.

**Simple Search**

Note that the search is case insensitive [Advanced Search](#)

Organization   PO Number

Due Date   Shipment Number   
(example: 06/22/2016)

Receipt Number  Item  

Supplier Item   Waybill/Airbill Number

Delivery Status **Late**  



Organization	PO Number	Due Date	Receipt Number	Receipt Date	NEORS D Item	Supplier Item	Description	Quantity UOM Received	Delivery Status
NEORS D LE	16001747	05/19/2016 13:08:49	2812	06/27/2016 08:12:03	083376		BOX OUTLET 2 GAUG 3/4" SHALLOW BOX ADALET NO FS2C-3 3/4 IN TY "MUST HAVE UL LISTING"	EA 2	Late
NEORS D LE	16001522	04/29/2016 15:35:24	8995	06/20/2016 09:03:45	113032		TY-RAP 5.5" 30LB NATURAL NYLON 6.6 S/S SELF LOCKING DEVICE 1.125" BUNDLE MAX DIMENSIONS 0.140"W X 5.50"L, "MUST HAVE UL LISTING" PANDUIT BT1.51M	EA 3000	Late
NEORS D LE	16001585	04/28/2016 08:54:49	8150	05/18/2016 14:08:16	250-963201	EPS-300 3M	TUBING HEAT SHRINK ASSORTED PACK OF 6' LENGTHS 1/8" TO 1" THICK ALPHA WIRE FIT 321 M5 1	PK 2	Late

Search results are displayed for all late shipment deliveries.

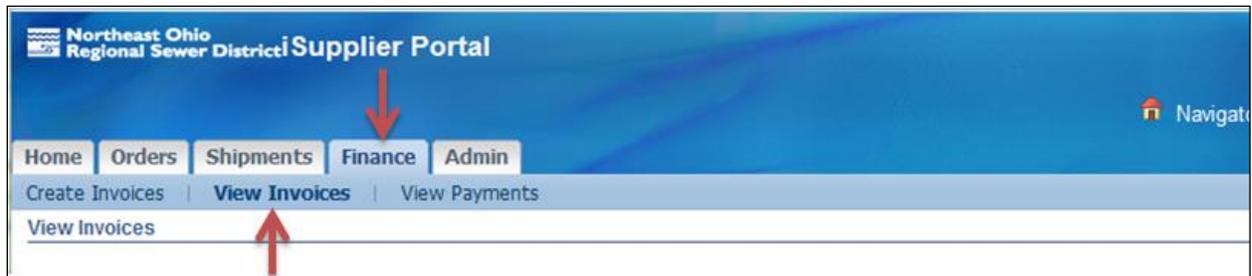
- 7- Note the inclusion of **Due Date** and **Receipt Date** for comparison purposes.

## Topic 4: iSupplier Home Page – Finance Tab

iSupplier portal users will have direct access to multiple levels of financial information through the **Finance** tab. This tab provides links to invoice and payment information.

This topic covers:

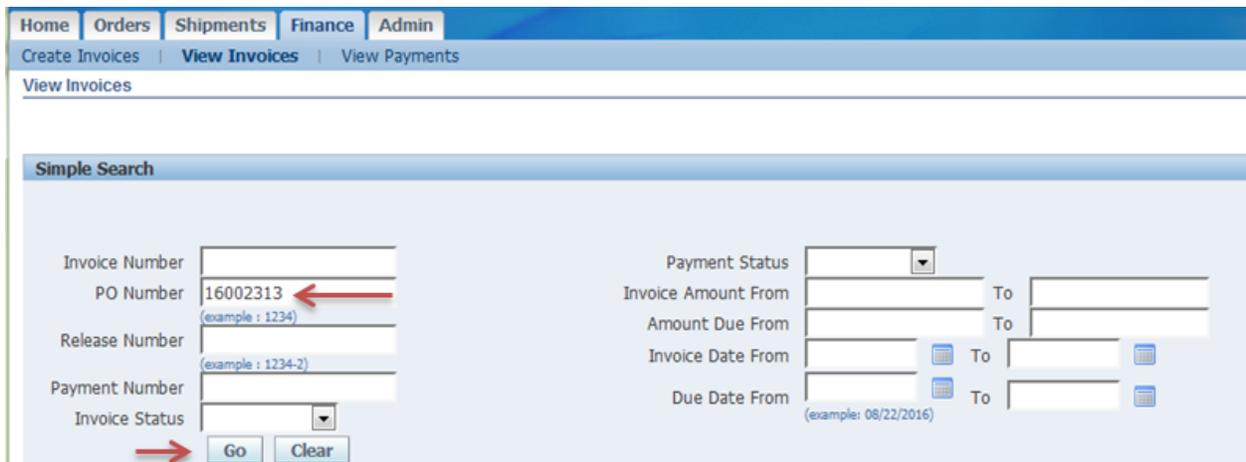
- Overview of the Finance tab and summary information
- Review of Invoice details
- Review of Payments details



The **Home Page** is displayed.

- 1- Click on the **Finance** tab.
- 2- Click the **View Invoices** link.

### Invoice Information



The **View Invoices** window is displayed. Note the multiple criteria available for query.

- 3- Enter the value in the **PO Number** field.
- 4- Click the **Go** button.

# iSupplier Training Guide

Simple Search

Invoice Number:   
 PO Number:   
 Release Number:   
 Payment Number:   
 Invoice Status:

Payment Status:   
 Invoice Amount From:  To:   
 Amount Due From:  To:   
 Invoice Date From:  To:   
 Due Date From:  To:

Go Clear

Advanced Search

Invoice	Invoice Date	Type	Amount	Due Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	PO Number	Receipt	Discount Date	Available Discount Attachments
<a href="#">S113965078.001</a>	06/06/2016	Standard	921.83	921.83	Approved	Not Paid			07/06/2016	16002313			

Search results are displayed in summary for all invoices related to the PO.

- 5- Click the **link** under **Invoice** to view details.

Home Orders Shipments Finance Admin

Create Invoices View Invoices View Payments

Finance: View Invoices >

Standard Invoice: S113965078.001 (Total USD 921.83)

Currency=USD

Export

**General**

Invoice Date: 06/06/2016  
 Status: Approved  
 On Hold:   
 Batch: GM060716-1  
 Attachments: [View](#)  
 Supplier: REXEL, IINC  
 Supplier Site: 02  
 Address: 02  
 PO BOX 742384  
 ATLANTA, GA 30374-2103

**Amount Summary**

Item: 921.83  
 Freight: 0.00  
 Miscellaneous: 0.00  
 Tax: 0.00  
 Prepayment: 0.00  
 Retainage: 0.00  
 Withholding Tax: 0.00  
 Total: 921.83

**Payment Information**

Paid: 0.00  
 Discount Taken: 0.00  
 Due: 921.83  
 Status: Not Paid  
 Payment Date:  
 Payment:  
 Term: NET 30 DAYS

Invoice Lines Scheduled Payments Hold Reasons

Inv Line	Type	Description	Qty	UOM	Price	Tax	Amount	Retainage	Status	PO Number	PO Line	Buyer	Receipt
1	Item	Explosion Proof LED Drop Light/Trouble Light Larson Electronics EHL-LED-7W-120XLV-C1d1-50-1523	1	EA	921.83		921.83	0.00	Approved	16002313	1	Shomen, Linda E	

Return to Finance: View Invoices

Export

Detail information for the invoice is displayed.

- 6- Note the **Payment Information** summary box.
- 7- Click the **Scheduled Payments** tab.

PO BOX 742384  
 ATLANTA, GA 30374-2103

Invoice Lines Scheduled Payments Hold Reasons

Due Date	Amount	Remaining Amount	Remit-to Supplier	Remit-to Supplier Site	Status	Method
07/06/2016	921.83		921.83		Not Paid	Check

Return to Finance: View Invoices

Export

**Payment Schedule** information for the invoice is displayed.

- 8- Click the **Hold Reasons** tab.

# iSupplier Training Guide



PO BOX 742384  
ATLANTA, GA 30374-2103

Invoice Lines | Scheduled Payments | **Hold Reasons**

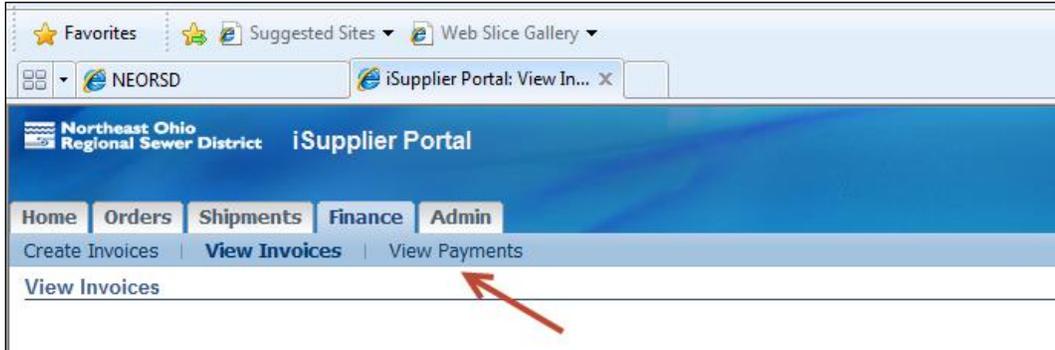
Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
No results found.					

[Return to Finance: View Invoices](#)  Export

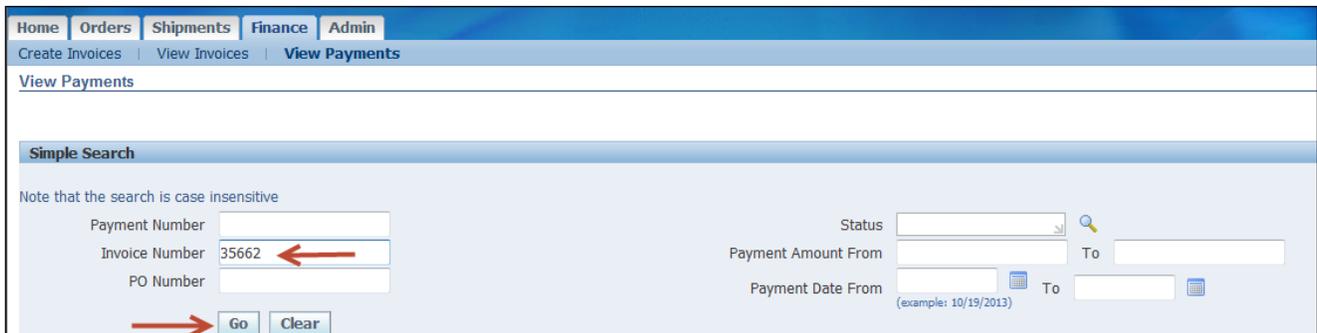
**Hold** and **Release** information for the invoice is displayed.

9- Click the **Return to Finance: View Invoices** link.

## Payments Information

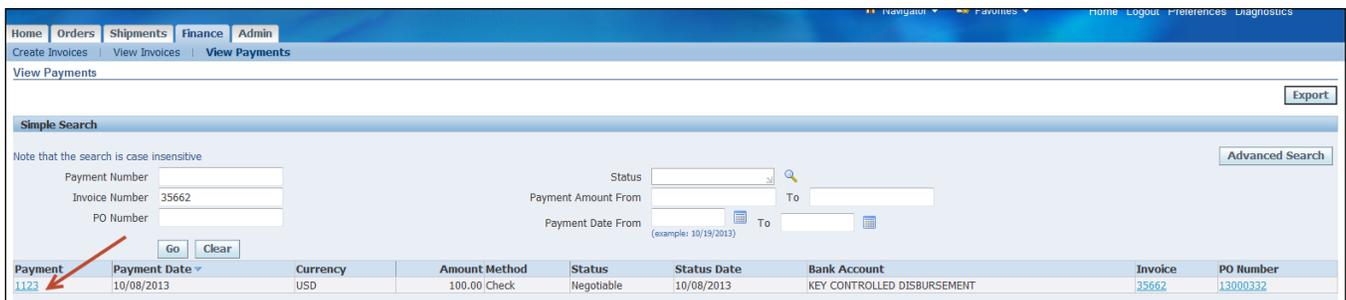


- 1- Click the **View Payments** link under the **Finance** tab.



The **View Payments** window is displayed. Note the multiple criteria available for query.

- 2- Enter the value in the **Invoice Number** field.
- 3- Click the **Go** button.



Search results are displayed.

- 4- Click the **link** under the **Payment** to view detail information.

# iSupplier Training Guide

The screenshot shows the 'View Payments' page in the iSupplier application. At the top, there are navigation tabs for 'Home', 'Orders', 'Shipments', 'Finance', and 'Admin'. Below these, there are sub-tabs for 'Create Invoices', 'View Invoices', and 'View Payments'. The main content area displays 'Payment: 1123 (Total USD 100.00)'. To the right of this, there is an 'Export' button. Below the payment information, there are two columns of details. The left column shows 'Payment Date: 10/08/2013', 'Method: Check', 'Status: Negotiable', and 'Status Date: 10/08/2013'. The right column shows 'Supplier: INDUSTRIAL SAFETY PRODUCTS INC', 'Supplier Site: 01', 'Address: 6091 CAREY DR', 'Bank Account: VALLEY VIEW OH 44125', and 'KEY CONTROLLED DISBURSEMENT'. Below this, there is a section titled 'Included Invoices' with a red arrow pointing to it. Underneath is a table with the following data:

Invoice	Invoice Date	Type	Currency	Amount	Status	Payment Status	Payment PO Number	Receipt	Attachments
<a href="#">35662</a>	10/08/2013	Standard	USD	100.00	Approved	Paid	100.00 13000332		

At the bottom left, there is a link 'Return to Finance: View Payments' with a red arrow pointing to it. At the bottom right, there is another 'Export' button.

Detail information for the payment is displayed. If desired, user can drill down on details for all **Included Invoices** associated with the payment.

- 5- Click the **Return to Finance, View Payments** link.

## Topic 5: Create Invoices

Registered iSupplier users can create and submit invoices directly through the portal. Once submitted, the invoice status can be viewed online through standard inquiry screens.

This topic covers:

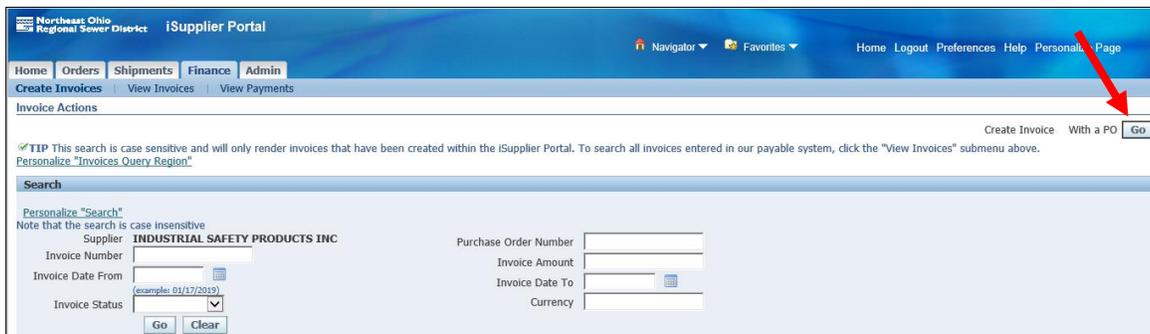
- Invoice creation and submission
- Confirmation of invoice submission status

### Invoice Creation



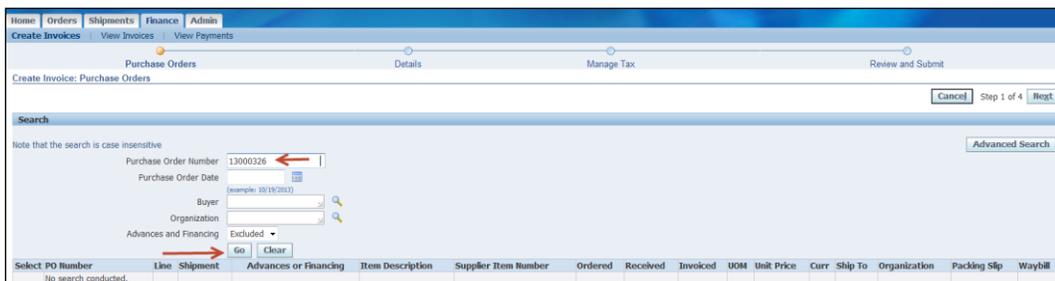
The **Home** tab is displayed.

- 1- Click on the **Finance** tab.



The **Invoice Actions** window is displayed.

- 2- Using the **Create Invoice with a PO** action box, click the **Go** button.



# iSupplier Training Guide



The **Create Invoice: Purchase Orders** window is displayed.

- 3- Using the **Search** window, enter the value in the **Purchase Order Number** field.
- 4- Click the **Go** button.

Select	PO Number	Line	Shipment	Advances or Financing	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	13000326	1	1	<input type="checkbox"/>	GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	UNKNOWN	2	2	0	PR	8.7767	USD	Easterly Internal Location	NEORSD LE		

Search results are displayed, showing all eligible PO lines.

- 5- Click the **Select** button next to line for **PO Number**.
- 6- Click the **Add to Invoice** button.

Select	PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization
<input checked="" type="checkbox"/>	13000326	1	1	GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	278802	UNKNOWN	2	2	0	PR	8.7767	USD	Easterly Internal Location	NEORSD LE

The line is now included in the **Purchase Order Items Added to Invoice** window.

- 7- Click the **Next** button.

**Supplier**

\* Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
 Tax Payer ID: 34-1792160  
 \* Remit To: [Search Icon] [Red Arrow]  
 Address: [Search Icon]  
 Remit To Bank Account: [Search Icon]  
 Unique Remittance Identifier: [Search Icon]  
 Remittance Check Digit: [Search Icon]

**Invoice**

\* Invoice Number: [Field]  
 \* Invoice Date: 10/19/2013  
 Invoice Type: Invoice  
 Currency: USD  
 Invoice Description: [Field]  
 Test: [Field]  
 Attachment: None Add...

**Customer**

\* Customer Tax Payer ID: [Field]  
 Customer Name: [Field]  
 Address: [Field]

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Quantity	*Quantity	Unit Price	UOM	Amount
13000326	1	1	GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	UNKNOWN	Easterly Internal Location	2		2 8.7767	PR	17.55

The **Create Invoice: Details** window is displayed. Use this window to complete detail information for the invoice.

**Note:** Required fields are indicated with \* and must be completed to proceed from this window.

- 8- If not defaulted, use the **Search** (magnifying glass) icon to find the appropriate **Remit To** value.

Search and Select: Remit To

Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Remit To  Go

**Results**

Select	Quick Select	Supplier	Remit To	Address	Organization
No search conducted.					

About this Page

Cancel Select

The **Search and Select** window is displayed.  
9- Click the **Go** button.

Search and Select: Remit To

Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Remit To  Go

**Results**

Select	Quick Select	Supplier	Remit To	Address	Organization
<input type="radio"/>		INDUSTRIAL SAFETY PRODUCTS INC	01	6091 CAREY DR VALLEY VIEW OH 44125	NEORS LE

About this Page

Cancel Select

The **Results** window is displayed.  
10- Use the **Quick Select** button to select the appropriate **Remit To** value.

Create Invoices | View Invoices | View Payments

Purchase Orders | Details | Manage Tax | Review and Submit

Create Invoice: Details

\* Indicates required field

Supplier

\* Supplier INDUSTRIAL SAFETY PRODUCTS INC  
Tax Payer ID 34-1792160  
\* Remit To 01  
Address 6091 CAREY DR VALLEY VIEW OH 44125  
Remit To Bank Account  
Unique Remittance Identifier  
Remittance Check Digit

Invoice

\* Invoice Number ISS67212  
\* Invoice Date 10/19/2013  
Invoice Type Invoice  
Currency USD  
Invoice Description  
Test  
Attachment None Add...

Cancel Back Step 2 of 4 Next

The **Remit To** value is entered into the field.  
11- Enter the appropriate value in the **Invoice Number** field.

12- Enter the appropriate value in the **Invoice Date** field. (Use the **Calendar** icon or enter date manually into field).



Customer

\* Customer Tax Payer ID   ←

Customer Name  
Address

In the **Customer** section of the window:

13- If not defaulted, use the **Search** (magnifying glass) icon to find the appropriate **Customer Tax Payer ID** value.



Search and Select: Customer Tax Payer ID

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By    ←

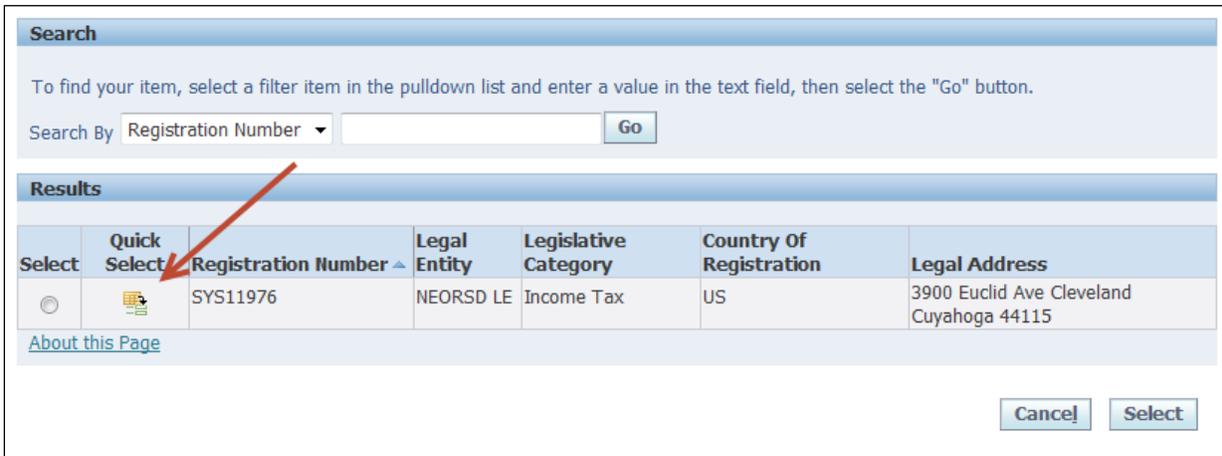
**Results**

Select	Quick Select	Registration Number	Legal Entity	Legislative Category	Country Of Registration	Legal Address
No search conducted.						

[About this Page](#)

The **Search and Select** window is displayed.

14- Click the **Go** button.



**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

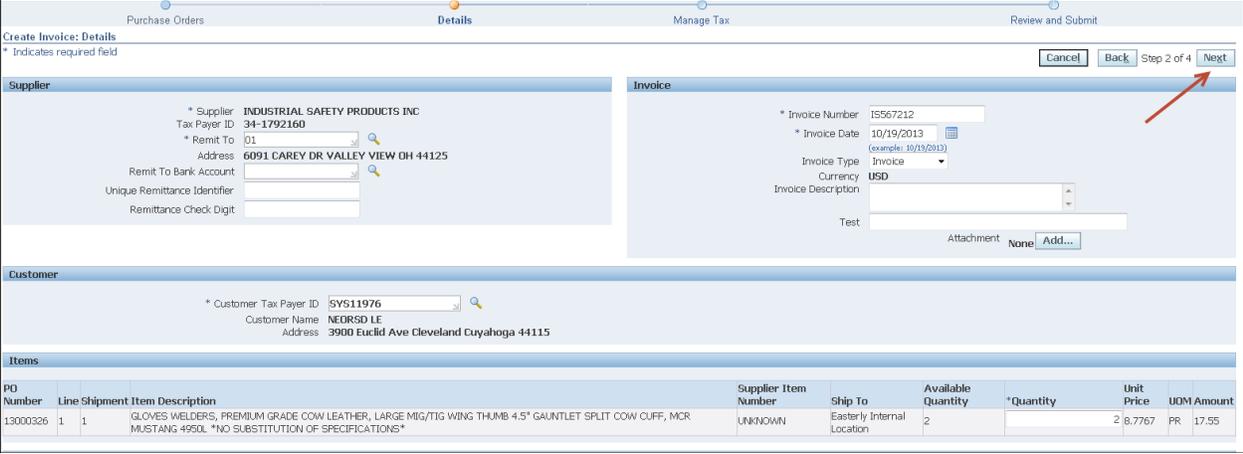
**Results**

Select	Quick Select	Registration Number	Legal Entity	Legislative Category	Country Of Registration	Legal Address
<input type="radio"/>	 ←	SYS11976	NEORSD LE	Income Tax	US	3900 Euclid Ave Cleveland Cuyahoga 44115

[About this Page](#)

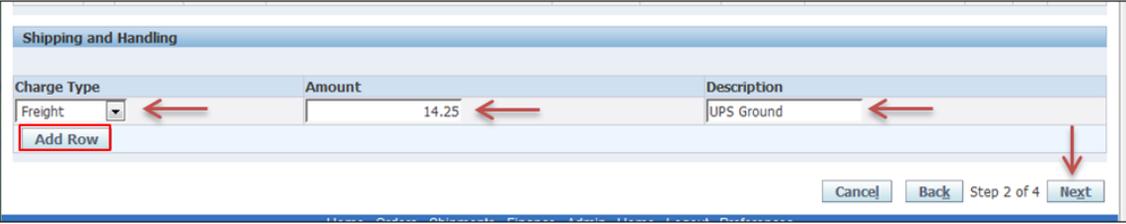
The **Results** window is displayed.

15- Use the **Quick Select** button to select the appropriate **Registration Number** value.



All required fields have now been entered for the invoice. Additional changes can be made if necessary.

16- Click the **Next** button.



At the bottom of the page, **Shipping and Handling** or other miscellaneous charges can be added to the invoice.

17- Click the **Add Row** button and select the **Charge Type**. Add **Amount** and **Description**.

18- Click **Next** button.

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
16002831	1	1	SIGNAL CONDITIONER, BULLETIN 931, ACITIVE CONVETER, 3 WAY, UNIVERISAL, ALLEN BRADLEY 931U-C9C7C-BC		EMSC Internal Location	5	5.00 EA	418.60	2,093.00

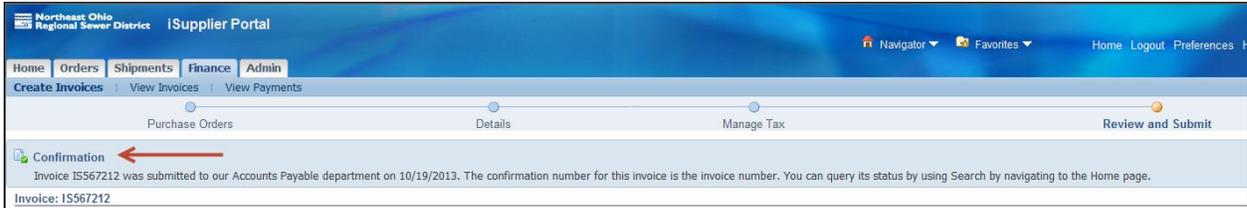
Charge Type	Amount	Description
Freight	14.25	UPS Ground

Invoice Summary	
Items	2,093.00
Less Retainage	0.00
Freight	14.25
Miscellaneous	0.00
Tax	0.00
<b>Total (USD)</b>	<b>2,107.25</b>

Buttons: Recalculate Total, Cancel, Save, Back, Step 3 of 4, Next, Submit

Review the invoice information.  
19- Click the **Submit** button.



Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

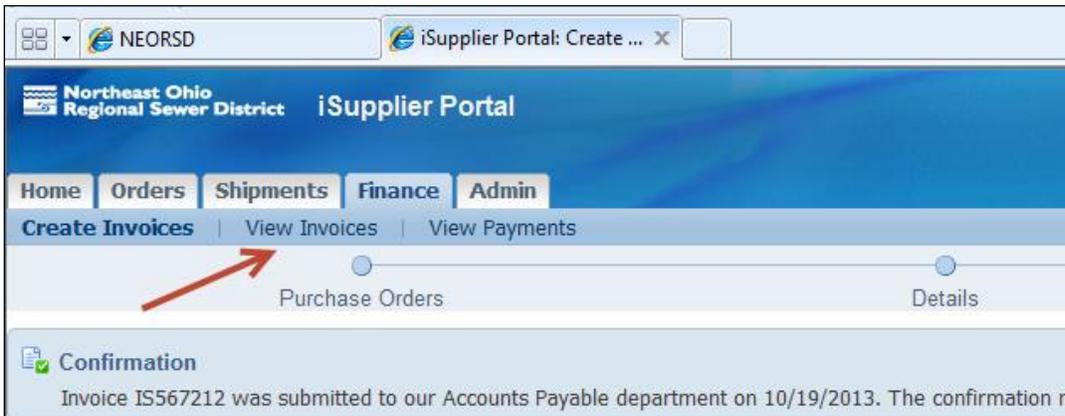
Create Invoices View Invoices View Payments

Purchase Orders Details Manage Tax Review and Submit

Confirmation  
Invoice IS567212 was submitted to our Accounts Payable department on 10/19/2013. The confirmation number for this invoice is the invoice number. You can query its status by using Search by navigating to the Home page.  
Invoice: IS567212

The **Confirmation** window is displayed. The invoice has now been submitted to the NEORISD AP Department.

### Confirmation of Invoice Submission Status



NEORSD iSupplier Portal: Create ... X

Northeast Ohio Regional Sewer District iSupplier Portal

Home Orders Shipments Finance Admin

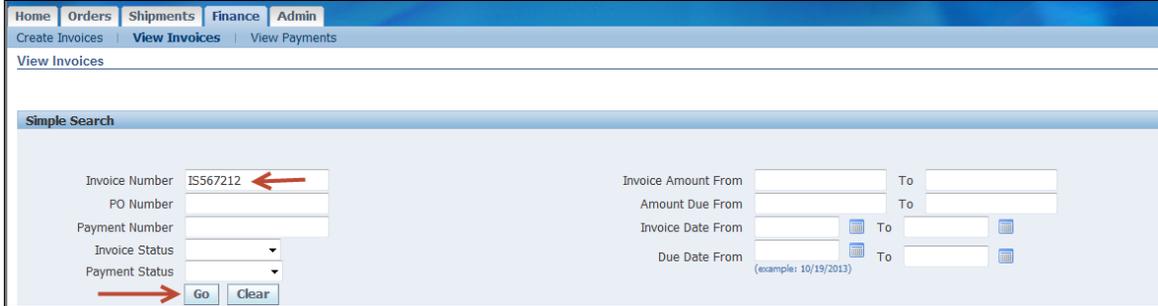
Create Invoices View Invoices View Payments

Purchase Orders Details

Confirmation  
Invoice IS567212 was submitted to our Accounts Payable department on 10/19/2013. The confirmation nu

To confirm the status of the submitted invoice:  
1- Click the **View Invoices** link.

# iSupplier Training Guide



Home Orders Shipments Finance Admin  
Create Invoices View Invoices View Payments  
View Invoices

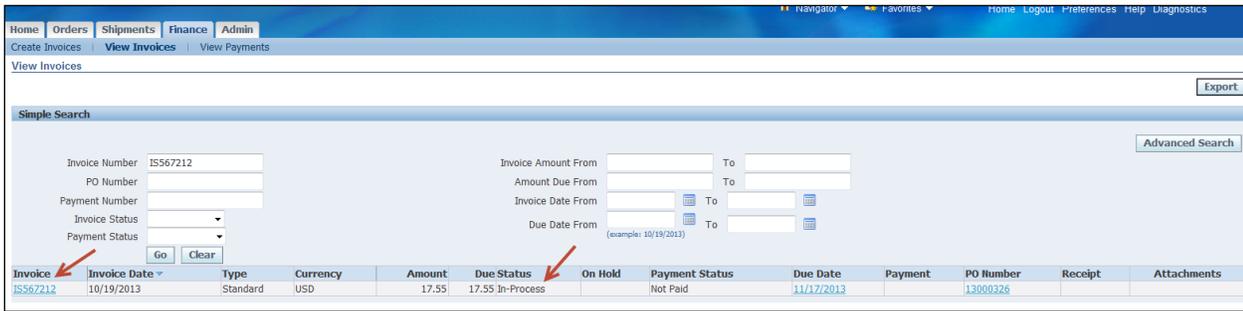
Simple Search

Invoice Number    
PO Number    
Payment Number    
Invoice Status    
Payment Status    
Go Clear

Invoice Amount From  To    
Amount Due From  To    
Invoice Date From  To    
Due Date From  To    
(example: 10/19/2013)

The **View Invoices** window is displayed.

- 2- Enter the value in the **Invoice Number** field.
- 3- Click the **Go** button.



Home Orders Shipments Finance Admin  
Create Invoices View Invoices View Payments  
View Invoices

Simple Search

Invoice Number    
PO Number    
Payment Number    
Invoice Status    
Payment Status    
Go Clear

Invoice Amount From  To    
Amount Due From  To    
Invoice Date From  To    
Due Date From  To    
(example: 10/19/2013)

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
<a href="#">IS567212</a>	10/19/2013	Standard	USD	17.55	17.55 In-Process		Not Paid	11/17/2013		12000326		

Search results are displayed.

- 4- Note the summary information for the invoice, including the **Status** of In-Process.

## Topic 6: Create Advance Shipment Notices

Registered iSupplier users can create and submit Advance Shipment Notices (ASN) directly through the portal. Once submitted, the status of the ASN can be viewed online through standard inquiry screens.

This topic covers:

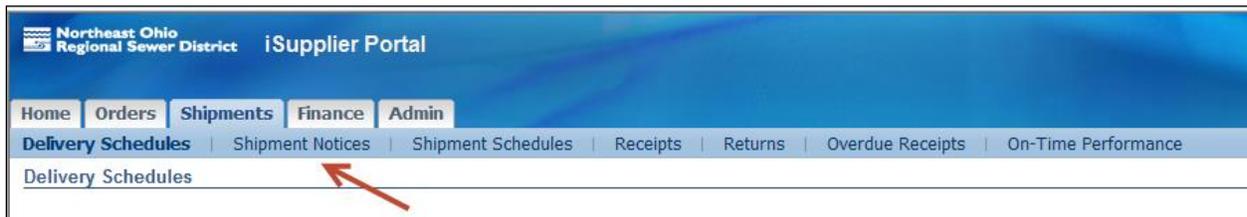
- Creation steps for Advance Shipment Notices
- Steps for viewing submitted Advance Shipment Notices
- Steps for cancelling submitted Advance Shipment Notices

### Advance Shipment Notice (ASN) Creation



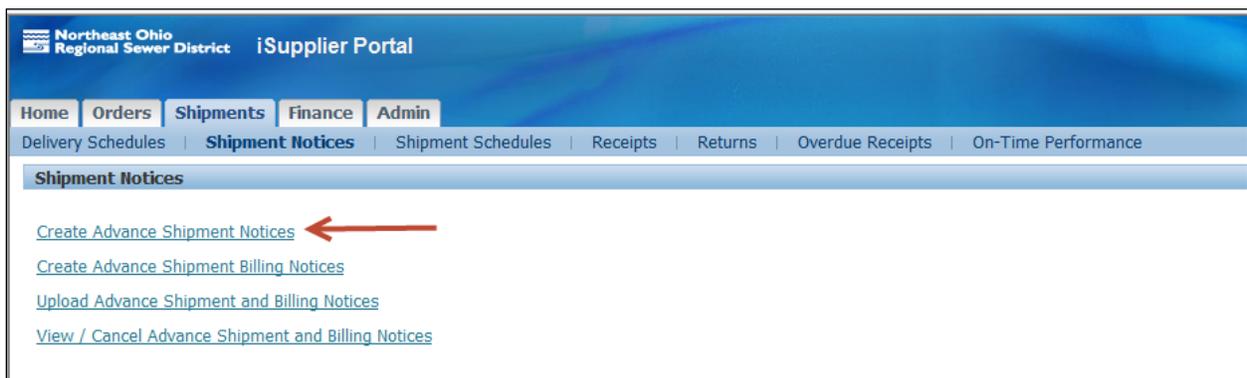
The **Home** tab is displayed.

- 1- Click on the **Shipments** tab.



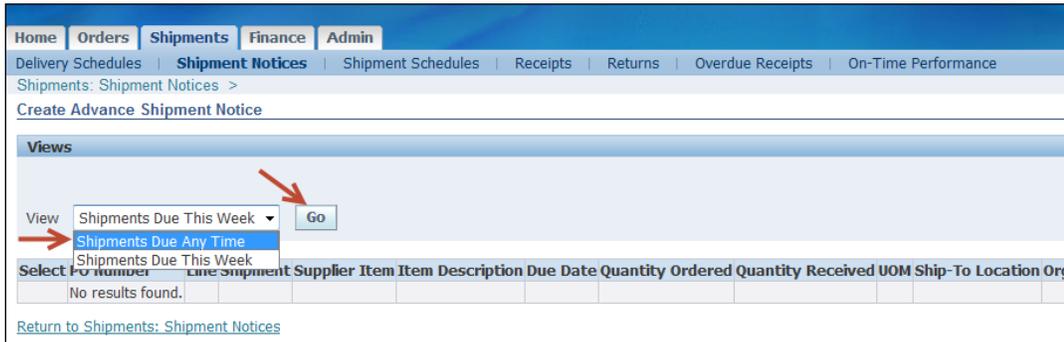
The **Shipments** window is displayed.

- 2- Click the **Shipment Notices** link.



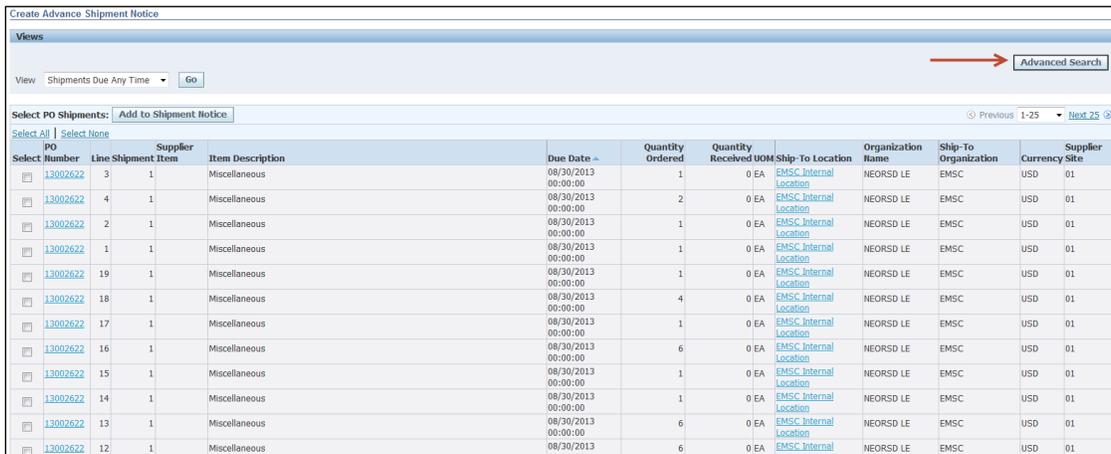
The **Shipment Notices** window is displayed.

- 3- Click the **Create Advance Shipment Notices** link.



The **Create Advance Shipment Notice** window is displayed. To search for shipments, use the **Views** window.

- 4- Select the **Shipments Due Any Time** value in the **View** field.
- 5- Click the **Go** button.



Eligible shipment lines are displayed as a result of the query.

- 6- Click the **Advanced Search** button.

**Advanced Search**

To search, please enter at least one search criteria.  
Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 13000083

Ship-To Location is

Supplier Site is

Item is

Go Clear Add Another Item Add

Select PO Number	Line	Shipment	Supplier	Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Ship-To Location	Organization Name	Ship-To Organization	Currency	Supplier Site
No search conducted.														

The **Advanced Search** window is displayed. Use this window to narrow the search.

- 7- Enter the value in the **PO Number** field.
- 8- Click the **Go** button.

Select PO Shipment: Add to Shipment Notice

Select All Select None

Select PO Number	Line	Shipment	Supplier	Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Ship-To Location	Organization Name	Ship-To Organization	Currency	Supplier Site
13000083	2	1		EPOXY PRIMER PART A	09/15/2013 17:00:00	6	0	GL		Administration Euclid Ave	NEORSO LE	NEO_ITM_MST	USD	01
13000083	1	1		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	5	0	EA		Administration Euclid Ave	NEORSO LE	NEO_ITM_MST	USD	01

Home Orders Shipments Finance Admin Home Logout Preferences Diagnostics

Search results are displayed for eligible shipment lines.

- 9- Click the **Select** button for each shipment line to be added.
- 10- Click the **Add to Shipment Notice** button.

Cancel Add Shipments Preview Submit

Shipment Header Shipment Lines

**Shipment Line Defaults**

Enter Shipment Line Defaults and click Default to All Lines to copy to all shipment lines.

Packing Slip Container Number

Country Of Origin Truck Number

Bar Code Label Comments

Default to All Lines

**Shipments in Advance Shipment Notice**

Show All Details Hide All Details

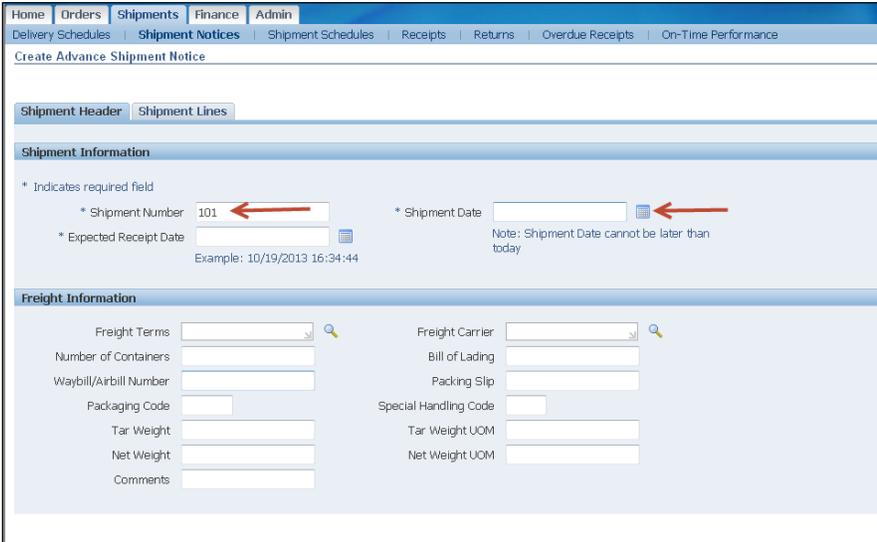
PO	Line	Shipment	Supplier	Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Quantity Shipped	Ship-To Location	LPI/Lot/Serial	Attachments	Split/Remove
Show 13000083	2	1		EPOXY PRIMER PART A	09/15/2013 17:00:00	6	0	GL		6	Administration Euclid Ave			
Show 13000083	1	1		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	5	0	EA		5	Administration Euclid Ave			

The lines are added in the **Shipments In Advanced Shipment Notice** section of the window.

**Note:** User can change quantities, remove lines, or split lines as needed from this window.

- 11- Click the **Shipment Header** tab.

# iSupplier Training Guide

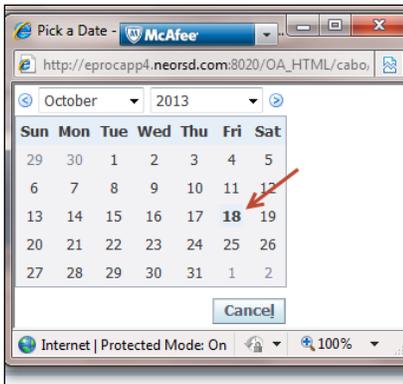


The **Shipment Header** window is displayed. Use this window to complete header information for the ASN.

**Note:** Required fields are indicated with \* and must be completed to proceed from this window.

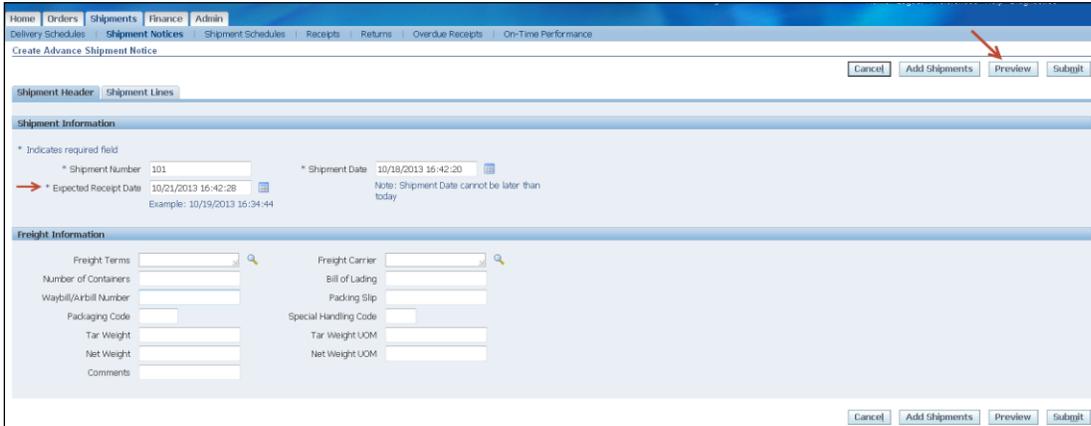
12- Enter the value in the **Shipment Number** field.

13- Click the **Calendar** icon for the **Shipment Date** field.



The **calendar** is displayed.

14- Click the appropriate **day** value.



Home | Orders | Shipments | Finance | Admin  
Delivery Schedules | **Shipment Notices** | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

Create Advance Shipment Notice

Cancel Add Shipments Preview Submit

Shipment Header | Shipment Lines

Shipment Information

\* Indicates required field

\* Shipment Number 101 \* Shipment Date 10/18/2013 16:42:20

→ \* Expected Receipt Date 10/21/2013 16:42:28 Note: Shipment Date cannot be later than today  
Example: 10/19/2013 16:34:44

Freight Information

Freight Terms Freight Carrier

Number of Containers Bill of Lading

Waybill/Airbill Number Packing Slip

Packaging Code Special Handling Code

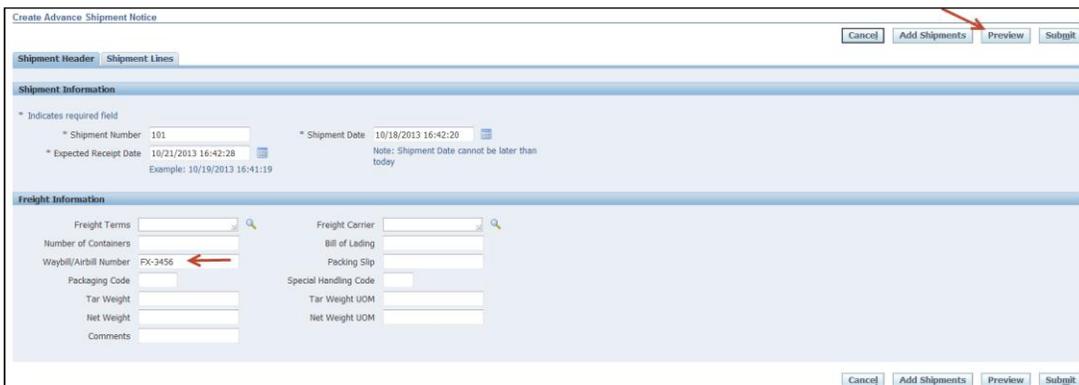
Tar Weight Tar Weight UOM

Net Weight Net Weight UOM

Comments

Cancel Add Shipments Preview Submit

15- Repeat the process to enter the value for the **Expected Receipt Date** field.



Create Advance Shipment Notice

Cancel Add Shipments Preview Submit

Shipment Header | Shipment Lines

Shipment Information

\* Indicates required field

\* Shipment Number 101 \* Shipment Date 10/18/2013 16:42:20

\* Expected Receipt Date 10/21/2013 16:42:28 Note: Shipment Date cannot be later than today  
Example: 10/19/2013 16:41:19

Freight Information

Freight Terms Freight Carrier

Number of Containers Bill of Lading

Waybill/Airbill Number FX-3456 ← Packing Slip

Packaging Code Special Handling Code

Tar Weight Tar Weight UOM

Net Weight Net Weight UOM

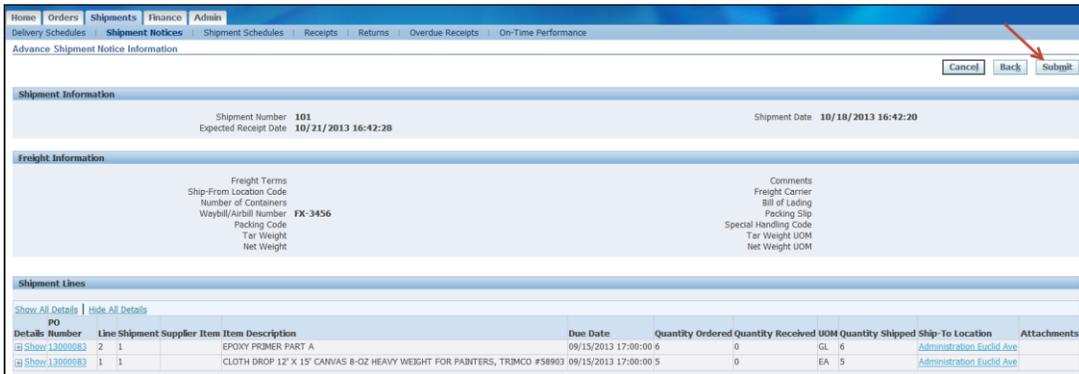
Comments

Cancel Add Shipments Preview Submit

Use the **Freight Information** section to add additional information if desired:

16- Enter value in the **Waybill/Airbill Number** field.

17- Click the **Preview** button.



Home | Orders | Shipments | Finance | Admin  
Delivery Schedules | **Shipment Notices** | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

Advance Shipment Notice Information

Cancel Back Submit

Shipment Information

Shipment Number 101 Shipment Date 10/18/2013 16:42:20

Expected Receipt Date 10/21/2013 16:42:28

Freight Information

Freight Terms Ship-From Location Code Comments

Number of Containers Freight Carrier Bill of Lading

Waybill/Airbill Number FX-3456 Packing Slip

Packaging Code Special Handling Code

Tar Weight Tar Weight UOM

Net Weight Net Weight UOM

Shipment Lines

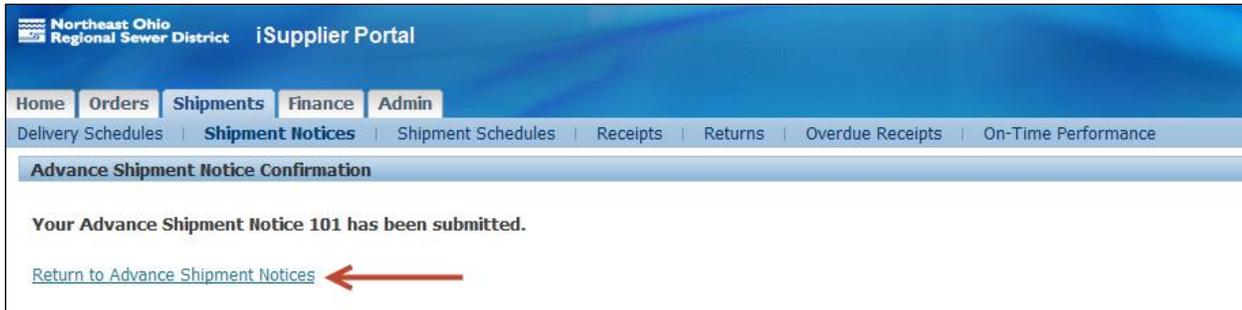
Show All Details | Hide All Details

PO	Line	Shipment	Supplier	Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Quantity Shipped	Ship-To Location	Attachments
13000093	2	1			EPOXY PRIMER PART A	09/15/2013 17:00:00	6	0	GL	6	Administration Euclid Ave	
13000093	1	1			CLOTH DROP 12' X 15' CANVAS 9-OZ HEAVY WEIGHT FOR PAINTERS, TRMCO #58993	09/15/2013 17:00:00	5	0	EA	5	Administration Euclid Ave	

Review the completed ASN information.

18- Click the **Submit** button.

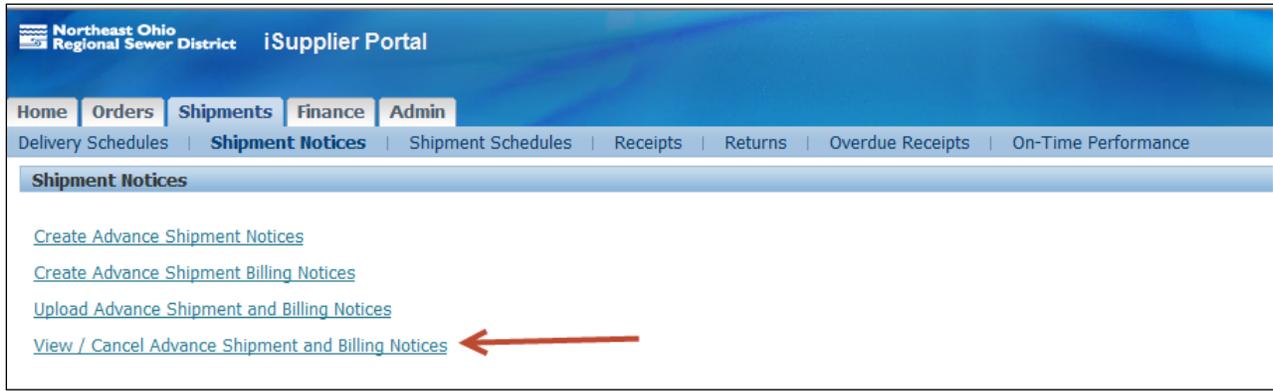
# iSupplier Training Guide



The **Confirmation** window is displayed.

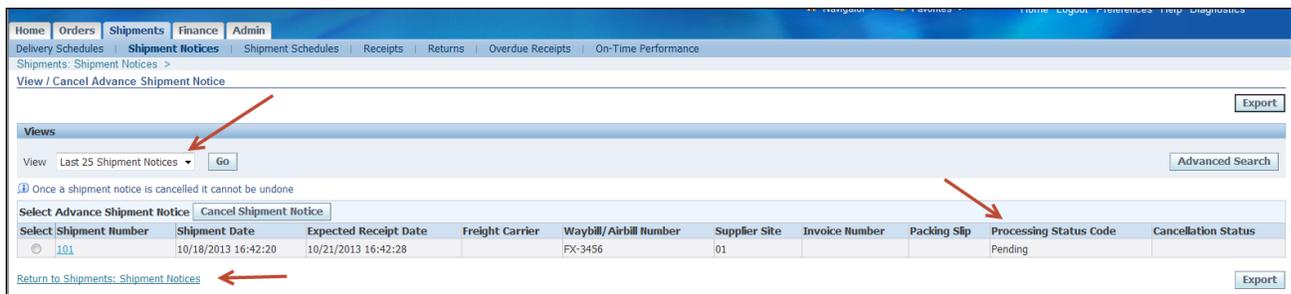
19- Click the **Return to Advance Shipment Notices** link.

## View Advance Shipment Notices



The **Shipment Notices** window is displayed.

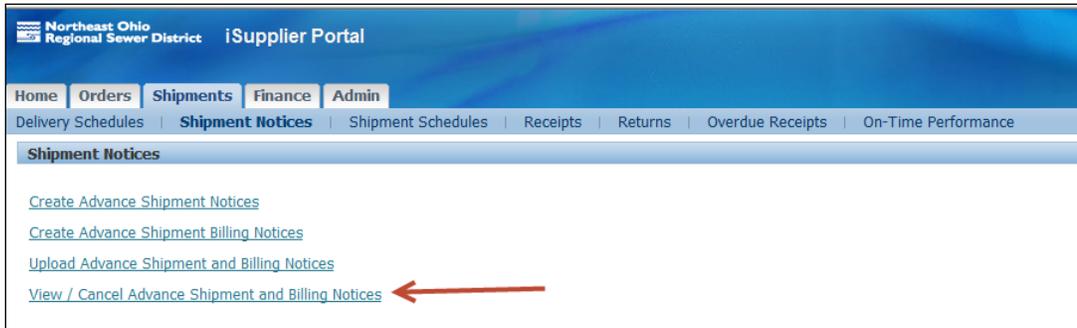
- 1- Click on the **View / Cancel Advance Shipment and Billing Notices** link.



The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

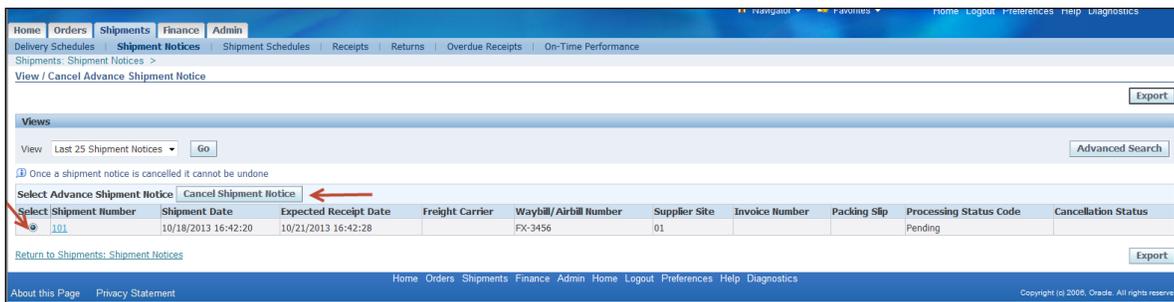
- 2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
- 3- Click the **Return to Shipments: Shipment Notices** link.

## Cancel Advance Shipment Notices



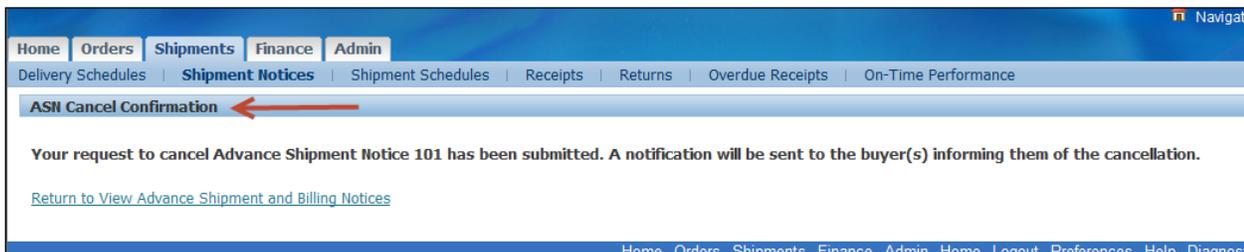
The **Shipment Notices** window is displayed.

- 1- Click on the **View / Cancel Advance Shipment and Billing Notices** link.



The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

- 2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
- 3- Click the **Select** button next to the **Shipment Number** to be cancelled.
- 4- Click the **Cancel Shipment Notice** button.



The **Confirmation** window is displayed.

**Note:** Once a shipment notice is cancelled, it cannot be undone.

## Topic 7: iSupplier Administrative Updates

Registered iSupplier users can maintain updated profile information directly through the portal. Changes to address, contact, product, and business classification information can be submitted for review and approval by NEORSR purchasing administration.

This topic covers:

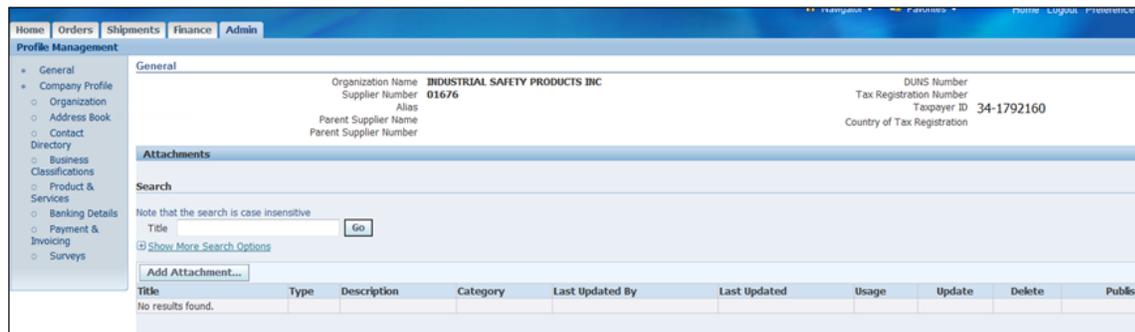
- Access to the Admin tab for viewing and updating profile information
- Updating supplier address information
- Updating supplier contact information
- Updating supplier product information
- Updating supplier business classification information

### Access the Admin Tab



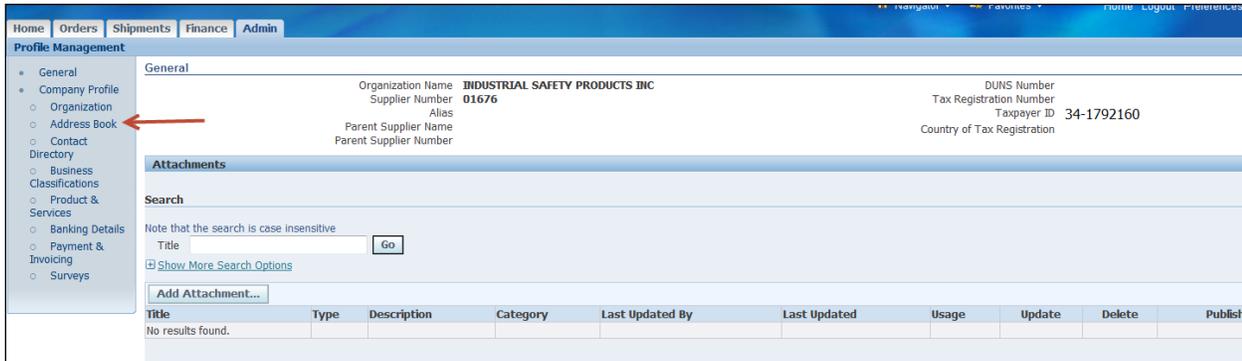
The **Home Page** is displayed.

- 1- Click the **Admin** tab.



The **Profile Management** window is displayed. Use this window to update all profile information.

## Update Supplier Address



Home | Orders | Shipments | Finance | Admin

**Profile Management**

- General
- Company Profile
- Organization
- Address Book**
- Contact Directory
- Business Classifications
- Product & Services
- Banking Details
- Payment & Invoicing
- Surveys

**General**

Organization Name: **INDUSTRIAL SAFETY PRODUCTS IIC**  
 Supplier Number: **01676**  
 DUNS Number: \_\_\_\_\_  
 Tax Registration Number: \_\_\_\_\_  
 Taxpayer ID: **34-1792160**  
 Parent Supplier Name: \_\_\_\_\_  
 Parent Supplier Number: \_\_\_\_\_  
 Country of Tax Registration: \_\_\_\_\_

**Attachments**

**Search**

Note that the search is case insensitive

Title:

Show More Search Options

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish
No results found.									

1- Click the **Address Book** link.



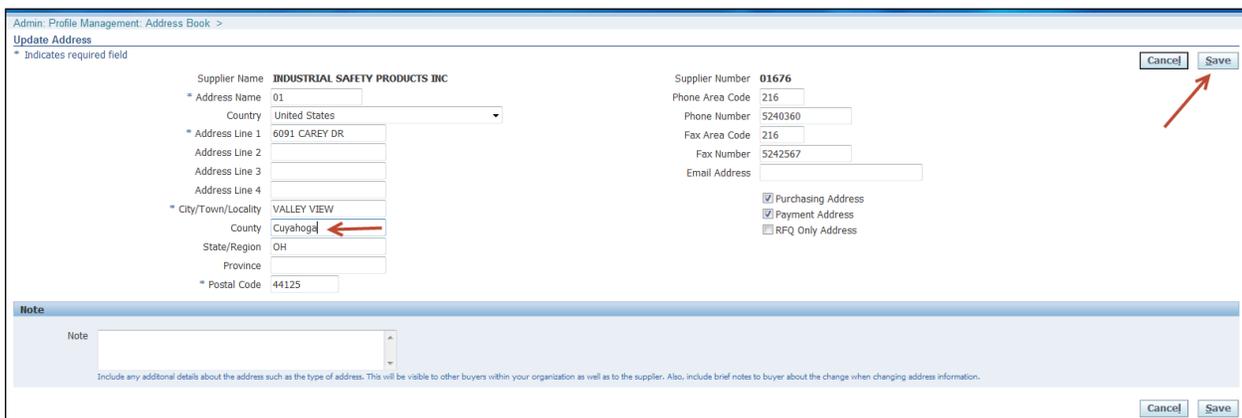
**Profile Management**

- General
- Company Profile
- Organization
- Address Book**
- Contact Directory
- Business Classifications
- Product & Services
- Banking Details
- Payment & Invoicing
- Surveys

Address Name	Address Details	Country	Update	Remove
01	6091 CAREY DR VALLEY VIEW, OH 44125	United States		

The **Address Book** window is displayed. All current addresses for the supplier are listed here.

2- Click the **Update** icon.



Admin: Profile Management: Address Book >

**Update Address**

\* Indicates required field

Supplier Name: **INDUSTRIAL SAFETY PRODUCTS IIC**  
 Supplier Number: **01676**  
 Phone Area Code: 216  
 Phone Number: 5240360  
 Fax Area Code: 216  
 Fax Number: 5242567  
 Email Address: \_\_\_\_\_

\* Address Name: 01  
 Country: United States  
 Address Line 1: 6091 CAREY DR  
 Address Line 2: \_\_\_\_\_  
 Address Line 3: \_\_\_\_\_  
 Address Line 4: \_\_\_\_\_

\* City/Town/Locality: VALLEY VIEW  
 County: **Cuyahoga**  
 State/Region: OH  
 Province: \_\_\_\_\_  
 \* Postal Code: 44125

Purchasing Address  
 Payment Address  
 RFQ Only Address

**Note**

Note:

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information.

The **Update Address** window is displayed. Use this window to make any changes or additions to address information.

3- Enter the value in the **County** field.

4- Click the **Save** button.

# iSupplier Training Guide

Confirmation   
Details for your 01 address have been modified.

Address Book

Create

Address Name ^	Address Details	Country	Update	Remove
01	6091 CAREY DR VALLEY VIEW, OH 44125	United States		

The **Confirmation** window is displayed.

## Update Supplier Contact Information



Home | Orders | Shipments | Finance | Admin

**Profile Management**

- General
- Company Profile
- Organization
- Address Book
- Contact Directory **←**
- Business Classifications
- Product & Services
- Banking Details
- Payment & Invoicing
- Surveys

**General**

Organization Name: **INDUSTRIAL SAFETY PRODUCTS INC**  
 Supplier Number: **01676**  
 Alias:  
 Parent Supplier Name:  
 Parent Supplier Number:  
 DUNS Number:  
 Tax Registration Number:  
 Taxpayer ID: **34-1792160**  
 Country of Tax Registration:

**Attachments**

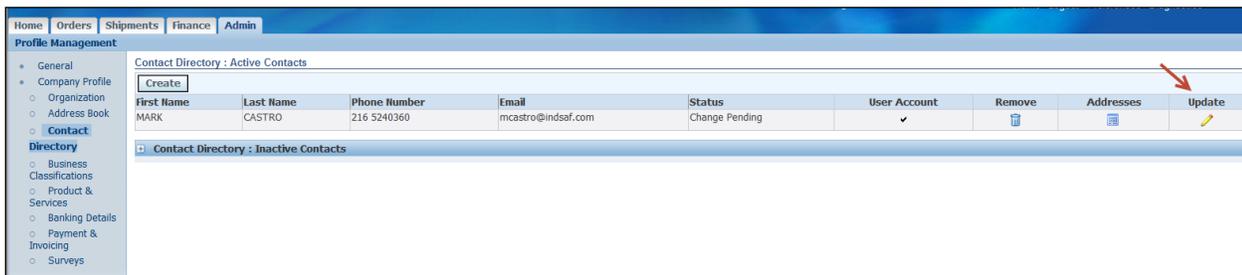
**Search**

Note that the search is case insensitive

Title:

[Show More Search Options](#)

1- Click the **Contact Directory** link.



Home | Orders | Shipments | Finance | Admin

**Profile Management**

- General
- Company Profile
- Organization
- Address Book
- Contact Directory
- Business Classifications
- Product & Services
- Banking Details
- Payment & Invoicing
- Surveys

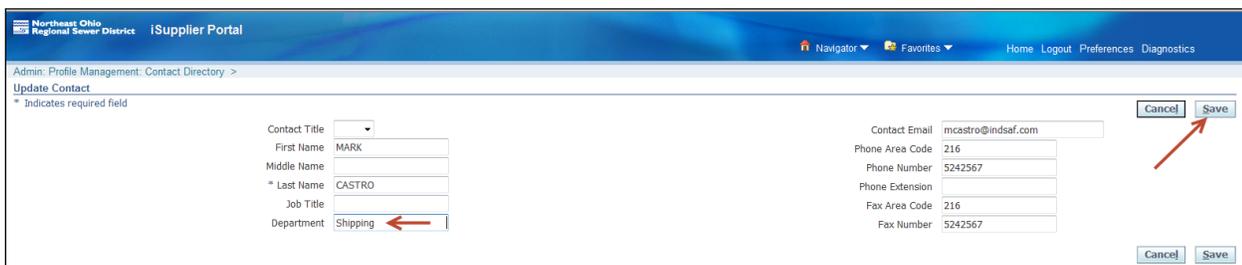
**Contact Directory : Active Contacts**

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
MARK	CASTRO	216 5240360	mcastro@indsaf.com	Change Pending	✓			

**Contact Directory : Inactive Contacts**

The **Contact Directory: Active Contacts** window is displayed. All active contacts for the supplier are listed here.

2- Click the **Update** icon.



Northeast Ohio Regional Sewer District | iSupplier Portal

Admin: Profile Management: Contact Directory >

**Update Contact**

\* Indicates required field

Contact Title:

First Name:

Middle Name:

\* Last Name:

Job Title:

Department:  **←**

Contact Email:

Phone Area Code:

Phone Number:

Phone Extension:

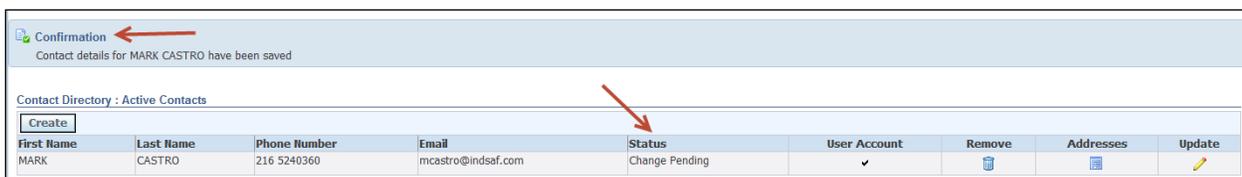
Fax Area Code:

Fax Number:

The **Update Contact** window is displayed. Use this window to make any changes or additions to contact information.

3- Enter the value in the **Department** field.

4- Click the **Save** button.



**Confirmation** **←**

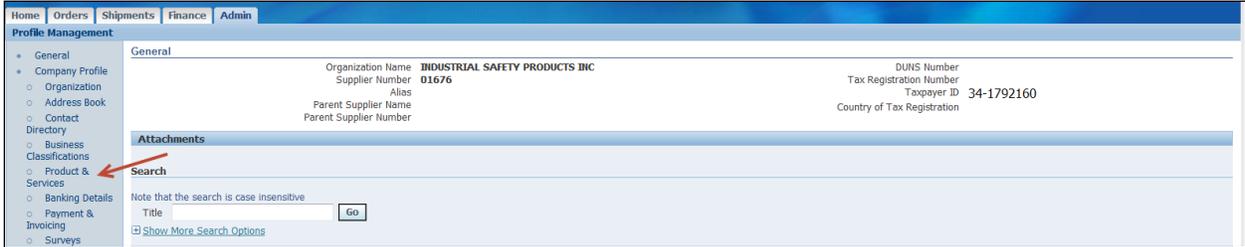
Contact details for MARK CASTRO have been saved

**Contact Directory : Active Contacts**

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
MARK	CASTRO	216 5240360	mcastro@indsaf.com	Change Pending	✓			

The **Confirmation** window is displayed. Note the **Status of Change Pending** as a result of the update.

## Update Products and Services Information



Home | Orders | Shipments | Finance | Admin

**Profile Management**

- General
- Company Profile
- Organization
- Address Book
- Contact Directory
- Business Classifications
- Product & Services**
- Banking Details
- Payment & Invoicing
- Surveys

**General**

Organization Name: **INDUSTRIAL SAFETY PRODUCTS INC**  
 Supplier Number: **01676**  
 Parent Supplier Name: **Atlas**  
 Parent Supplier Number:

DUNS Number:   
 Tax Registration Number:   
 Taxpayer ID: **34-1792160**  
 Country of Tax Registration:

**Attachments**

**Search**

Note that the search is case insensitive

Title:

Show More Search Options

1- Click the **Products & Services** link.



Home | Orders | Shipments | Finance | Admin

**Profile Management**

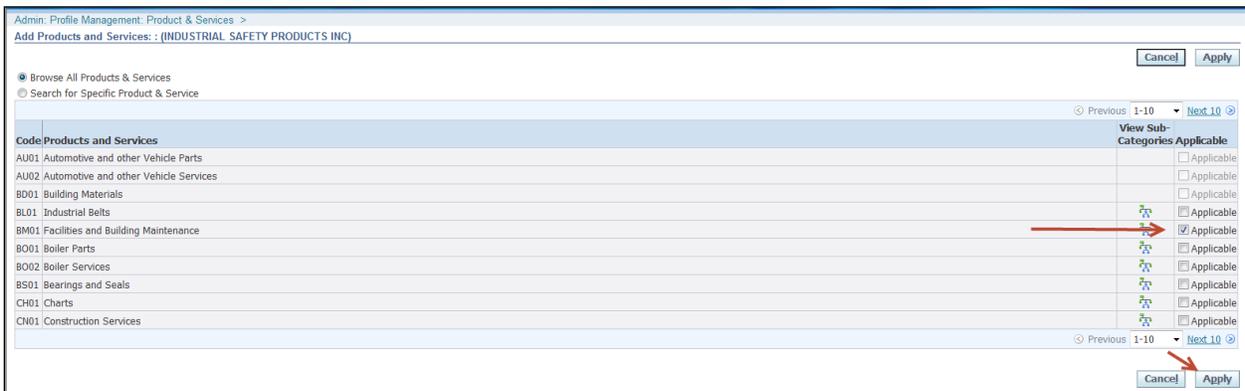
**Products and Services**

Select All | Select None

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/> AU01	Automotive and other Vehicle Parts	09/09/2013	Approved	
<input type="checkbox"/> AU02	Automotive and other Vehicle Services	09/09/2013	Approved	
<input type="checkbox"/> BD01	Building Materials	09/09/2013	Approved	

The **Products & Services** window is displayed. All current **approved** products and services for the supplier are listed.

2- Click the **Add** button.



Admin: Profile Management: Product & Services >  
 Add Products and Services: (INDUSTRIAL SAFETY PRODUCTS INC)

Browse All Products & Services  
 Search for Specific Product & Service

Code: **Products and Services**

Code	Products and Services	View Sub-Categories Applicable
AU01	Automotive and other Vehicle Parts	<input type="checkbox"/> Applicable
AU02	Automotive and other Vehicle Services	<input type="checkbox"/> Applicable
BD01	Building Materials	<input type="checkbox"/> Applicable
BL01	Industrial Belts	<input checked="" type="checkbox"/> Applicable
BM01	Facilities and Building Maintenance	<input checked="" type="checkbox"/> Applicable
BO01	Boiler Parts	<input type="checkbox"/> Applicable
BO02	Boiler Services	<input type="checkbox"/> Applicable
BS01	Bearings and Seals	<input type="checkbox"/> Applicable
CH01	Charts	<input type="checkbox"/> Applicable
CN01	Construction Services	<input type="checkbox"/> Applicable

The **Add Products and Services** window is displayed. Use this window to browse through the values, or select the **Search** option for a specific search if desired.

**Note:** Only **applicable** values are listed or available for search for each supplier.

3- Click the checkbox for the desired Applicable value(s).

4- Click the **Apply** button.

# iSupplier Training Guide



The **Confirmation** window is displayed.

5- Click the **Return to Products and Services** link.



Profile Management

Products and Services

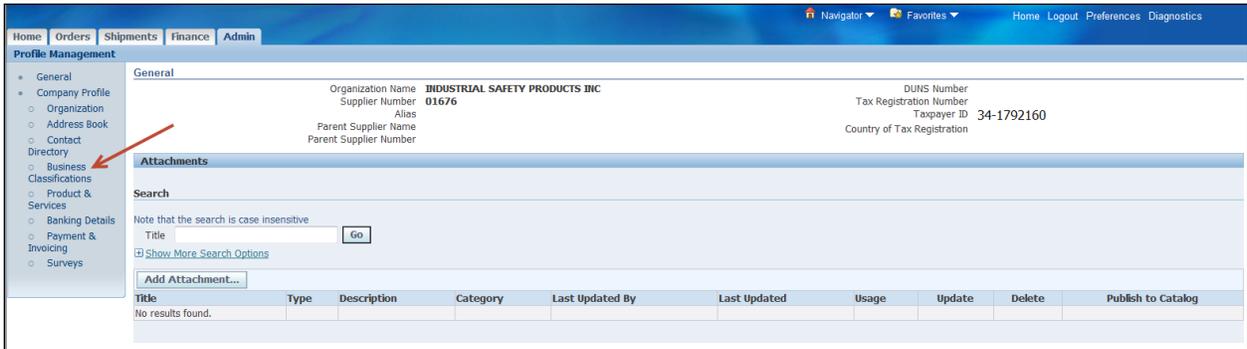
Select All | Select None

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/> AU01	Automotive and other Vehicle Parts	09/09/2013	Approved	
<input type="checkbox"/> AU02	Automotive and other Vehicle Services	09/09/2013	Approved	
<input type="checkbox"/> BD01	Building Materials	09/09/2013	Approved	
<input type="checkbox"/> BM01	Facilities and Building Maintenance	10/19/2013	Pending Approval	

The Products and Services window is displayed with the added value.

6- Note the **Approval Status of Pending Approval** for the added value.

## Update Supplier Business Classifications



Home Orders Shipments Finance Admin

Profile Management

General

Organization Name: **INDUSTRIAL SAFETY PRODUCTS INC**  
Supplier Number: **01676**  
Alias  
Parent Supplier Name  
Parent Supplier Number

DUNS Number  
Tax Registration Number  
Taxpayer ID: **34-1792160**  
Country of Tax Registration

Attachments

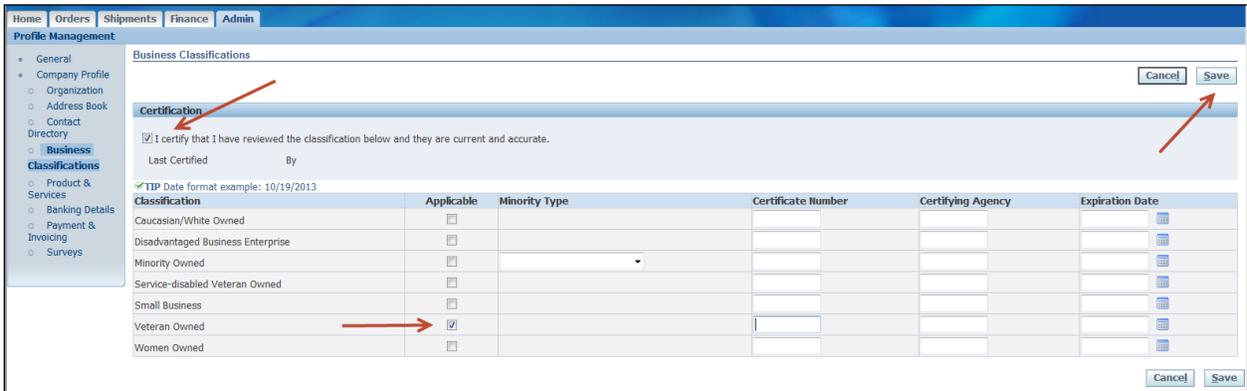
Search

Note that the search is case insensitive  
Title  
Go  
[Show More Search Options](#)

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

1- Click on the **Business Classifications** link.



Home Orders Shipments Finance Admin

Profile Management

Business Classifications

Cancel Save

Certification

I certify that I have reviewed the classification below and they are current and accurate.  
Last Certified By

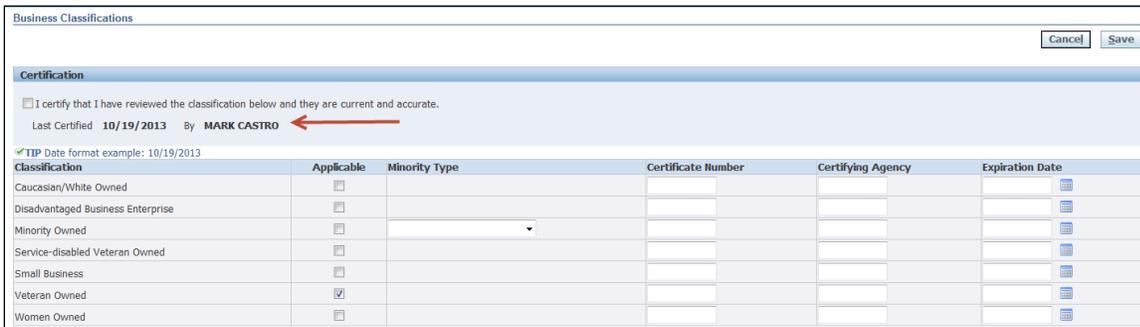
TIP Date format example: 10/19/2013

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Caucasian/White Owned	<input type="checkbox"/>				
Disadvantaged Business Enterprise	<input type="checkbox"/>				
Minority Owned	<input type="checkbox"/>				
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input type="checkbox"/>				
Veteran Owned	<input checked="" type="checkbox"/>				
Women Owned	<input type="checkbox"/>				

Cancel Save

The **Business Classifications** window is displayed.

- 2- Select the appropriate classification. Enter additional certifying information if known.
- 3- Click the **Certification** checkbox.
- 4- Click the **Save** button.



Business Classifications

Cancel Save

Certification

I certify that I have reviewed the classification below and they are current and accurate.  
Last Certified **10/19/2013** By **MARK CASTRO**

TIP Date format example: 10/19/2013

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Caucasian/White Owned	<input type="checkbox"/>				
Disadvantaged Business Enterprise	<input type="checkbox"/>				
Minority Owned	<input type="checkbox"/>				
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input type="checkbox"/>				
Veteran Owned	<input checked="" type="checkbox"/>				
Women Owned	<input type="checkbox"/>				

The **Business Classification** window is updated with **Last Certified** information.

## Topic 8: Sourcing Supplier Portal

### Supplier Access to Sourcing Supplier Portal

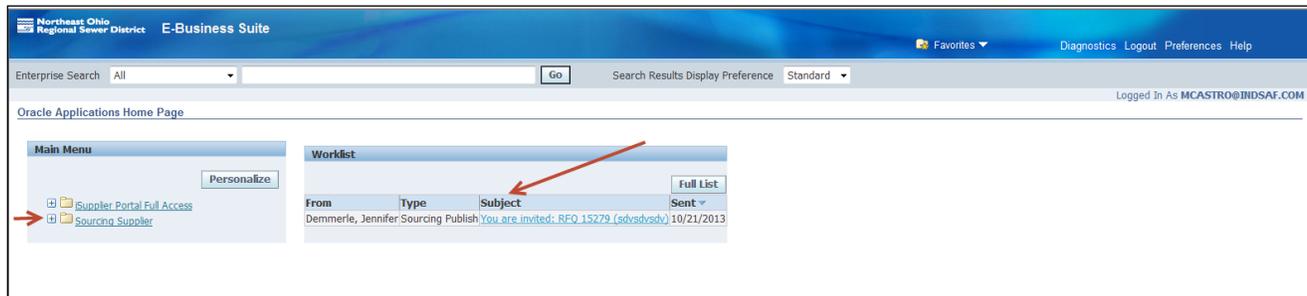
Approved supplier users will be registered at NEORSR for access to this portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated NEORSR administrators. The email information will also include the appropriate **link** to the login page for access.

This topic covers:

- Navigation to the Sourcing Supplier Home Page and Review
- Responding to RFQ invitations through online quote creation
- Creating online discussions through portal messaging

### Sourcing Supplier Home Page



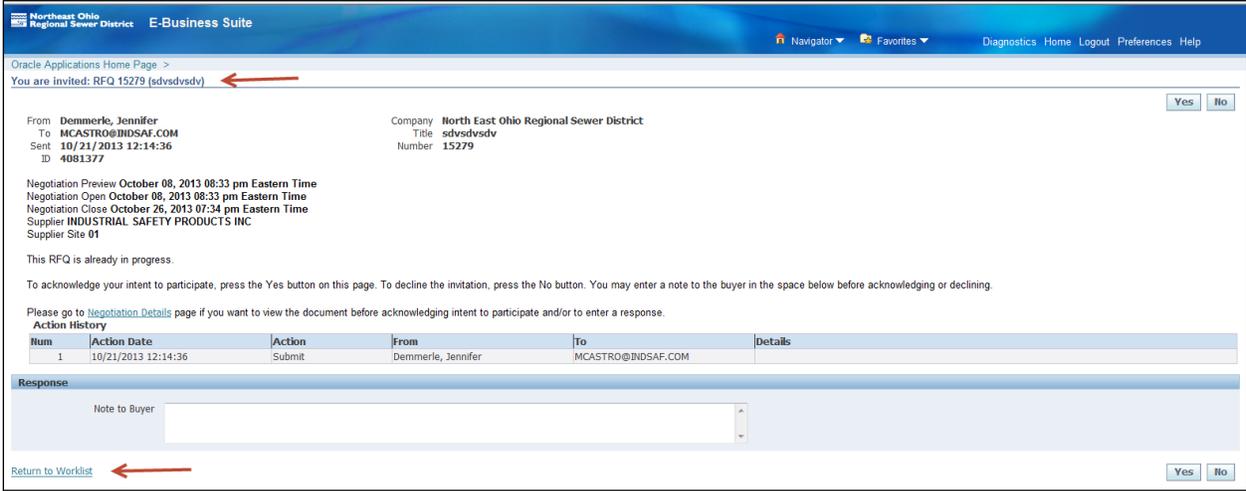
The **Oracle Applications Home Page** is displayed.

Note the **Sourcing Supplier** responsibility listed. This responsibility provides access to the **Home Page** for Sourcing Supplier.

Note the **Worklist** region of this page. All **Invitations** for quote responses will be listed here.

- 1- Click the **Subject** link to view the details of the invitation.

# iSupplier Training Guide



Northeast Ohio Regional Sewer District E-Business Suite

Oracle Applications Home Page >  
You are invited: RFQ 15279 (sdvsdvsdv) ←

From: Demmerle, Jennifer  
To: MCASTRO@INDSAF.COM  
Sent: 10/21/2013 12:14:36  
ID: 4081377

Company: North East Ohio Regional Sewer District  
Title: sdvsdvsdv  
Number: 15279

Yes No

Negotiation Preview: October 08, 2013 08:33 pm Eastern Time  
Negotiation Open: October 08, 2013 08:33 pm Eastern Time  
Negotiation Close: October 26, 2013 07:34 pm Eastern Time  
Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
Supplier Site: 01

This RFQ is already in progress.

To acknowledge your intent to participate, press the Yes button on this page. To decline the invitation, press the No button. You may enter a note to the buyer in the space below before acknowledging or declining.

Please go to [Negotiation Details](#) page if you want to view the document before acknowledging intent to participate and/or to enter a response.

Action History

Item	Action Date	Action	From	To	Details
1	10/21/2013 12:14:36	Submit	Demmerle, Jennifer	MCASTRO@INDSAF.COM	

Response

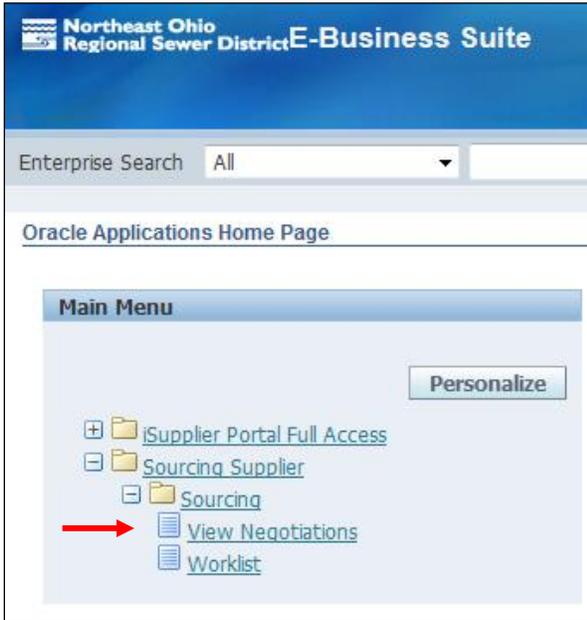
Note to Buyer

Return to Worklist ←

Yes No

The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

- 2- Click the **Return to Worklist** link.



Northeast Ohio Regional Sewer District E-Business Suite

Enterprise Search All

Oracle Applications Home Page

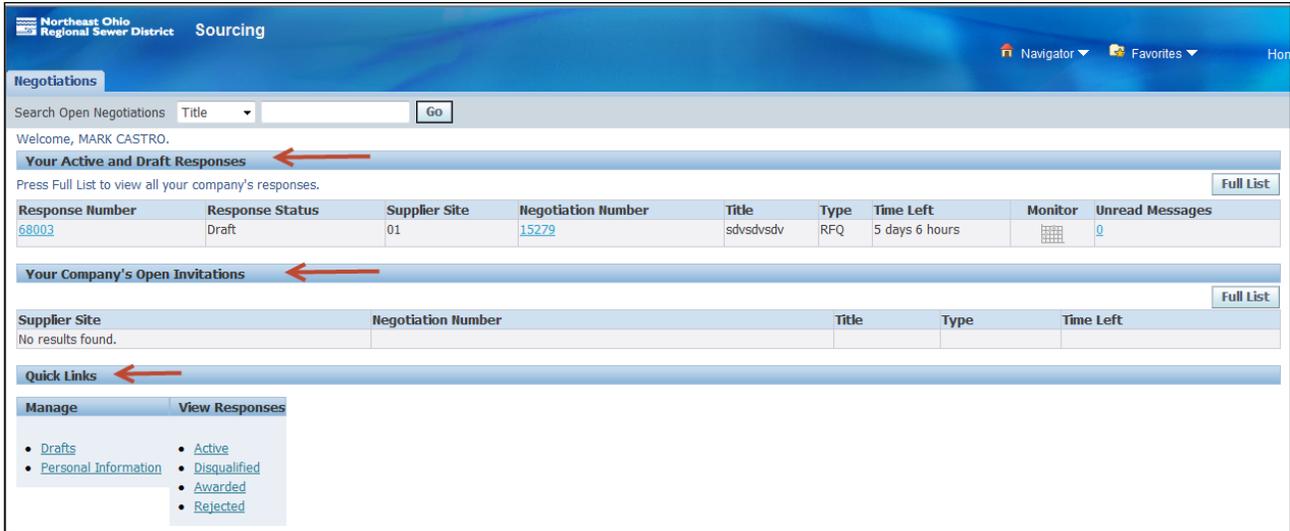
Main Menu

Personalize

- Supplier Portal Full Access
- Sourcing Supplier
  - Sourcing
  - View Negotiations ←
  - Worklist

- 3- Follow the menu **Sourcing Supplier / Sourcing / View Negotiations** link to navigate to the **Negotiations Home Page**.

# iSupplier Training Guide



The screenshot displays the 'Sourcing' page for the Northeast Ohio Regional Sewer District. The page is titled 'Negotiations' and includes a search bar for 'Open Negotiations'. Below the search bar, a welcome message for 'MARK CASTRO' is shown. The main content area is divided into three sections, each with a red arrow pointing to it:

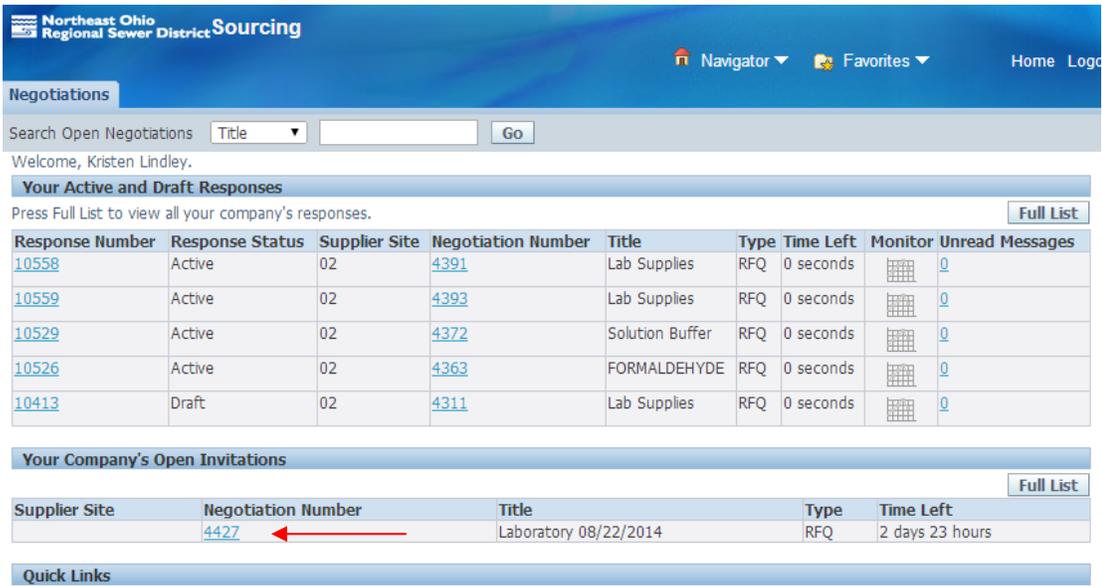
- Your Active and Draft Responses:** A table listing responses with columns for Response Number, Response Status, Supplier Site, Negotiation Number, Title, Type, Time Left, Monitor, and Unread Messages. A 'Full List' button is present.
- Your Company's Open Invitations:** A table with columns for Supplier Site, Negotiation Number, Title, Type, and Time Left. It currently shows 'No results found.' and a 'Full List' button.
- Quick Links:** A section with two tabs: 'Manage' and 'View Responses'. Under 'Manage', there are links for 'Drafts' and 'Personal Information'. Under 'View Responses', there are links for 'Active', 'Disqualified', 'Awarded', and 'Rejected'.

The **Home Page** is displayed.

- 4- Note the information contained in the **Your Active and Draft Responses** region of the page. You will use this region to navigate directly to all of your quote responses.
- 5- Note the information contained in the **Your Company's Open Invitations** region of the page. All new open invitations for RFQs will be listed here.
- 6- Note the **Quick Links** region of the page. You will use this region to navigate **directly** to view Responses by **Type (Active/Disqualified/Accepted/Rejected)**. Use this region to also update **Personal Information** related to contact information for responses.

## Creating a quote response

Registered supplier users can immediately respond to NEORSR bid invitations through the portal. Completed quotes can include notes to buyer, and any attachments that the supplier user wants to add as part of the response. Prior to submission, quote responses can be **validated** to ensure all required information is entered on the response.



The screenshot shows the 'Sourcing' section of the Northeast Ohio Regional Sewer District portal. It includes a search bar for 'Open Negotiations', a welcome message for 'Kristen Lindley', and two main sections: 'Your Active and Draft Responses' and 'Your Company's Open Invitations'.

**Your Active and Draft Responses**

Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
<a href="#">10558</a>	Active	02	<a href="#">4391</a>	Lab Supplies	RFQ	0 seconds		<a href="#">0</a>
<a href="#">10559</a>	Active	02	<a href="#">4393</a>	Lab Supplies	RFQ	0 seconds		<a href="#">0</a>
<a href="#">10529</a>	Active	02	<a href="#">4372</a>	Solution Buffer	RFQ	0 seconds		<a href="#">0</a>
<a href="#">10526</a>	Active	02	<a href="#">4363</a>	FORMALDEHYDE	RFQ	0 seconds		<a href="#">0</a>
<a href="#">10413</a>	Draft	02	<a href="#">4311</a>	Lab Supplies	RFQ	0 seconds		<a href="#">0</a>

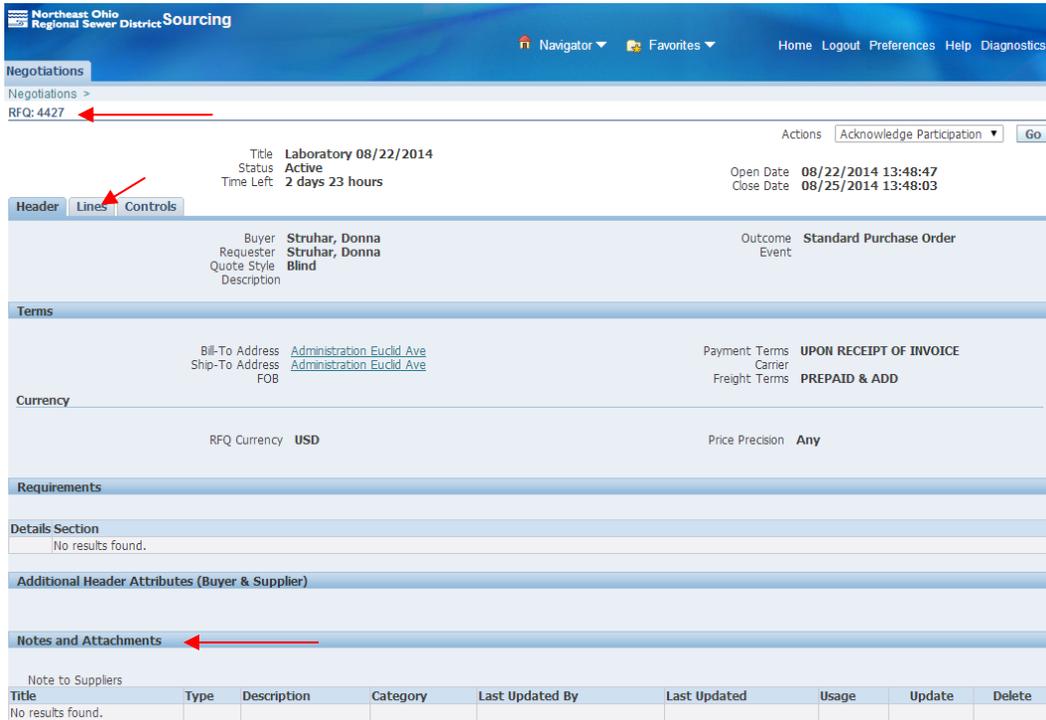
**Your Company's Open Invitations**

Supplier Site	Negotiation Number	Title	Type	Time Left
	<a href="#">4427</a> ←	Laboratory 08/22/2014	RFQ	2 days 23 hours

**Quick Links**

All new quote requests are listed in the **Your Company's Open Invitations** section of the Home Page.

- 1- Click the **link** under the **Negotiation Number** field to access the negotiation (aka RFQ).



Northeast Ohio Regional Sewer District Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations

Negotiations > RFQ: 4427

Title: Laboratory 08/22/2014  
Status: Active  
Time Left: 2 days 23 hours

Open Date: 08/22/2014 13:48:47  
Close Date: 08/25/2014 13:48:03

Header Lines Controls

Buyer Requester: Struhar, Donna  
Quote Style: Blind  
Description: Struhar, Donna

Outcome Event: Standard Purchase Order

Terms

Bill-To Address: Administration Euclid Ave  
Ship-To Address: Administration Euclid Ave  
FOB

Payment Terms: UPON RECEIPT OF INVOICE  
Carrier  
Freight Terms: PREPAID & ADD

Currency

RFQ Currency: USD  
Price Precision: Any

Requirements

Details Section

No results found.

Additional Header Attributes (Buyer & Supplier)

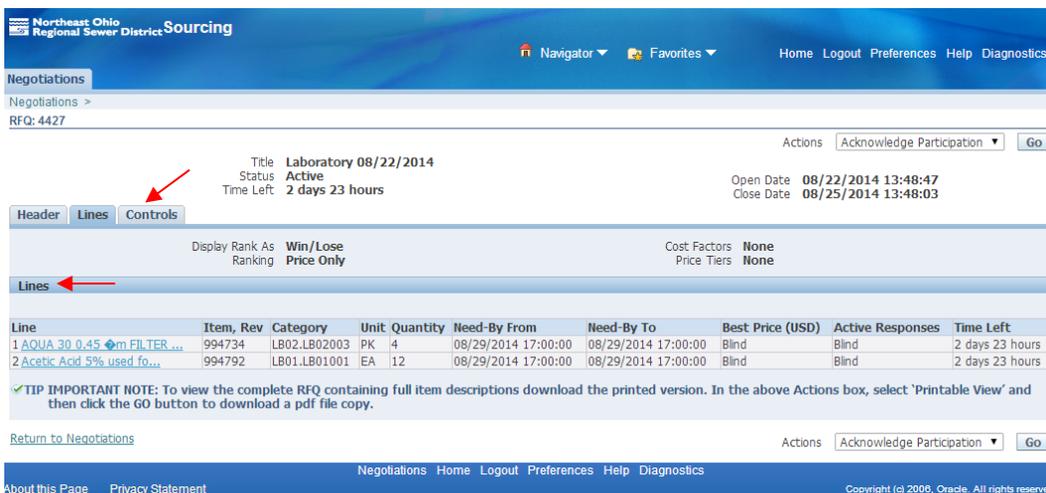
Notes and Attachments

Note to Suppliers

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

The **Negotiations** window is displayed, showing **summary** information for the RFQ Header. The Header tab may contain attached documents shown at the bottom.

2- Click on the **Lines** tab to access the lines of the RFQ



Northeast Ohio Regional Sewer District Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations

Negotiations > RFQ: 4427

Title: Laboratory 08/22/2014  
Status: Active  
Time Left: 2 days 23 hours

Open Date: 08/22/2014 13:48:47  
Close Date: 08/25/2014 13:48:03

Header Lines Controls

Display Rank As: Win/Lose  
Ranking: Price Only

Cost Factors: None  
Price Tiers: None

Lines

Line	Item, Rev	Category	Unit	Quantity	Need-By From	Need-By To	Best Price (USD)	Active Responses	Time Left	
1	AQUA 30 0.45 m FILTER...	994734	LB02.LB02003	PK	4	08/29/2014 17:00:00	08/29/2014 17:00:00	Blind	Blind	2 days 23 hours
2	Acetic Acid 5% used fo...	994792	LB01.LB01001	EA	12	08/29/2014 17:00:00	08/29/2014 17:00:00	Blind	Blind	2 days 23 hours

✓ TIP IMPORTANT NOTE: To view the complete RFQ containing full item descriptions download the printed version. In the above Actions box, select 'Printable View' and then click the GO button to download a pdf file copy.

Return to Negotiations

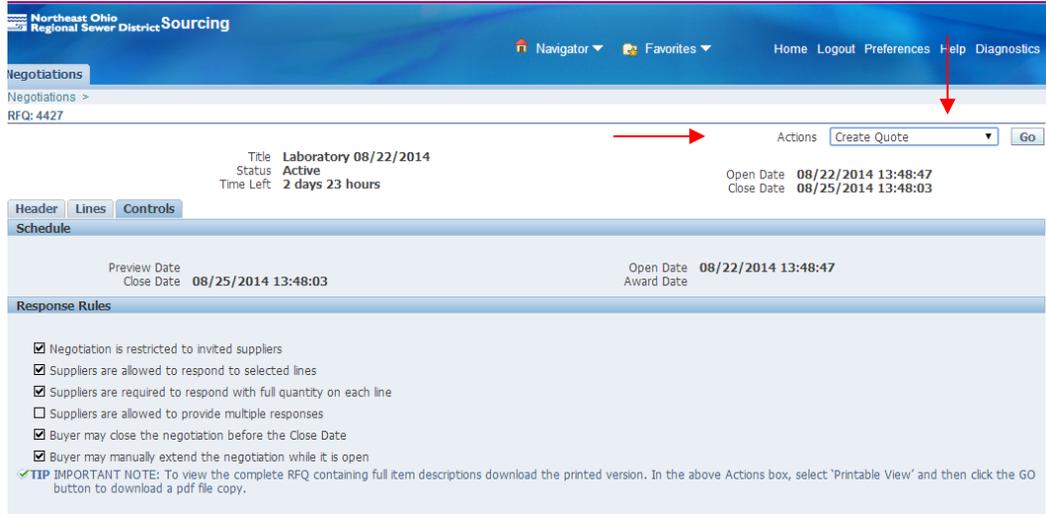
Actions: Acknowledge Participation Go

About this Page Privacy Statement Negotiations Home Logout Preferences Help Diagnostics Copyright (c) 2006. Oracle. All rights reserved.

The **RFQ Lines** window is displayed, showing all detail lines information for the RFQ.

3- Click on the **Controls** tab to view response rules for the RFQ.

# iSupplier Training Guide



Northeast Ohio Regional Sewer District Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations

Negotiations >

RFQ: 4427

Title Laboratory 08/22/2014  
Status Active  
Time Left 2 days 23 hours

Open Date 08/22/2014 13:48:47  
Close Date 08/25/2014 13:48:03

Actions Create Quote Go

Header Lines Controls

Schedule

Preview Date  
Close Date 08/25/2014 13:48:03

Open Date 08/22/2014 13:48:47  
Award Date

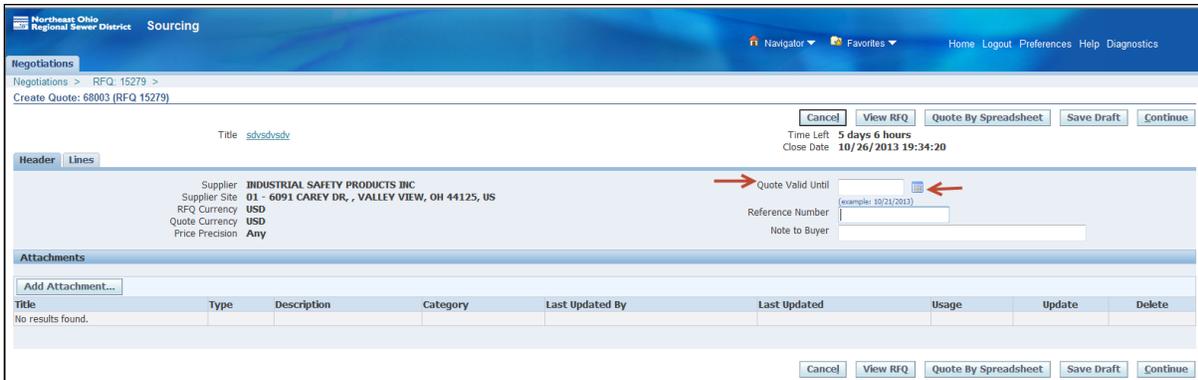
Response Rules

- Negotiation is restricted to invited suppliers
- Suppliers are allowed to respond to selected lines
- Suppliers are required to respond with full quantity on each line
- Suppliers are allowed to provide multiple responses
- Buyer may close the negotiation before the Close Date
- Buyer may manually extend the negotiation while it is open

**TIP IMPORTANT NOTE:** To view the complete RFQ containing full item descriptions download the printed version. In the above Actions box, select 'Printable View' and then click the GO button to download a pdf file copy.

The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by NEORSR for the RFQ.

- 4- Review the information in this window.
- 5- To initiate the creation of the quote response, select the **Create Quote** value in the **Actions** box.
- 6- Click the **Go** button.



Northeast Ohio Regional Sewer District Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations

Negotiations > RFQ: 15279 >

Create Quote: 68003 (RFQ 15279)

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

Title sdvsdsvd

Time Left 5 days 6 hours  
Close Date 10/26/2013 19:34:20

Supplier INDUSTRIAL SAFETY PRODUCTS INC  
Supplier Site 01 - 6091 CAREY DR., VALLEY VIEW, OH 44125, US  
RFQ Currency USD  
Quote Currency USD  
Price Precision Any

Quote Valid Until  
Reference Number  
Note to Buyer

Attachments

Add Attachment...

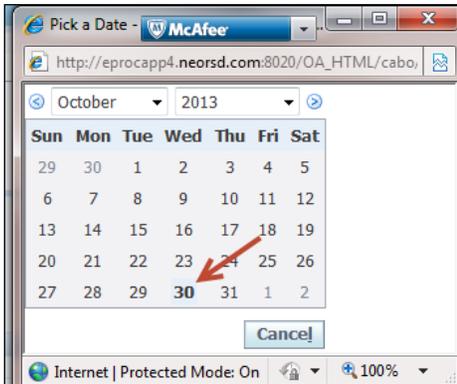
Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

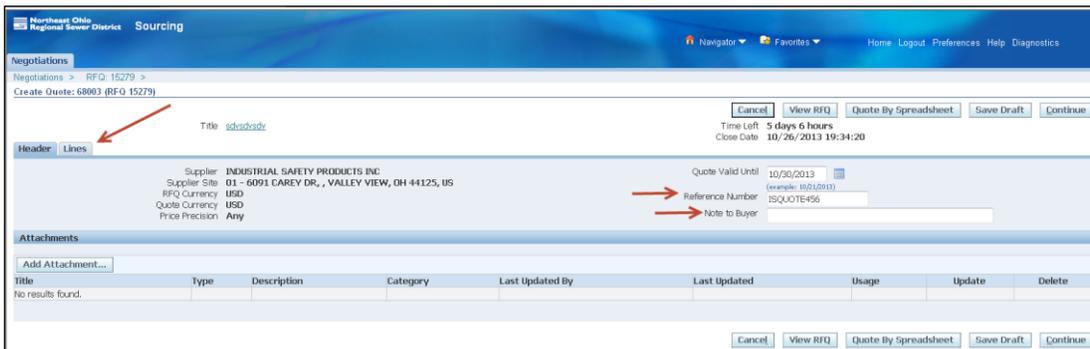
- 7- Use the **Calendar** icon to enter the appropriate value for the **Quote Valid Until** date.

# iSupplier Training Guide



The **Calendar** window is displayed.

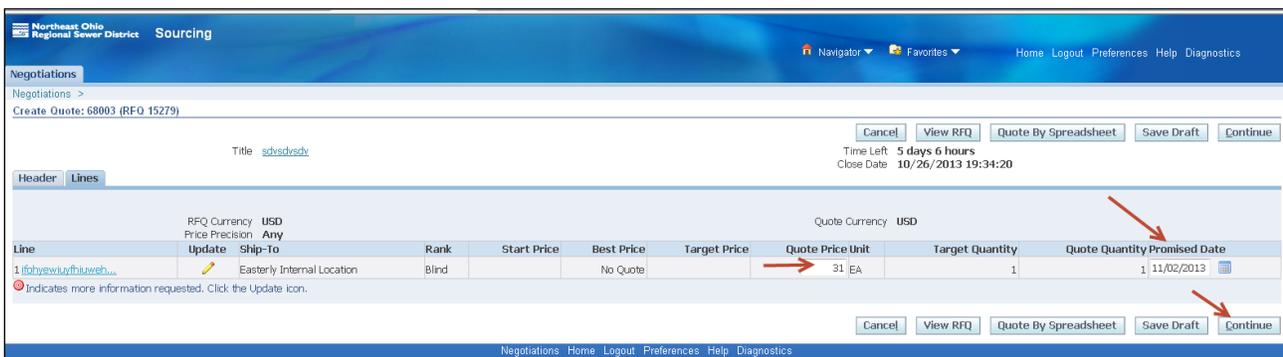
8- Select the appropriate **Day** value.



9- Enter the value for the **Reference Number** of the quote response.

10- If desired, enter a **Note to Buyer** (up to 240 characters) in the designated field. Use this field to advise estimated freight costs.

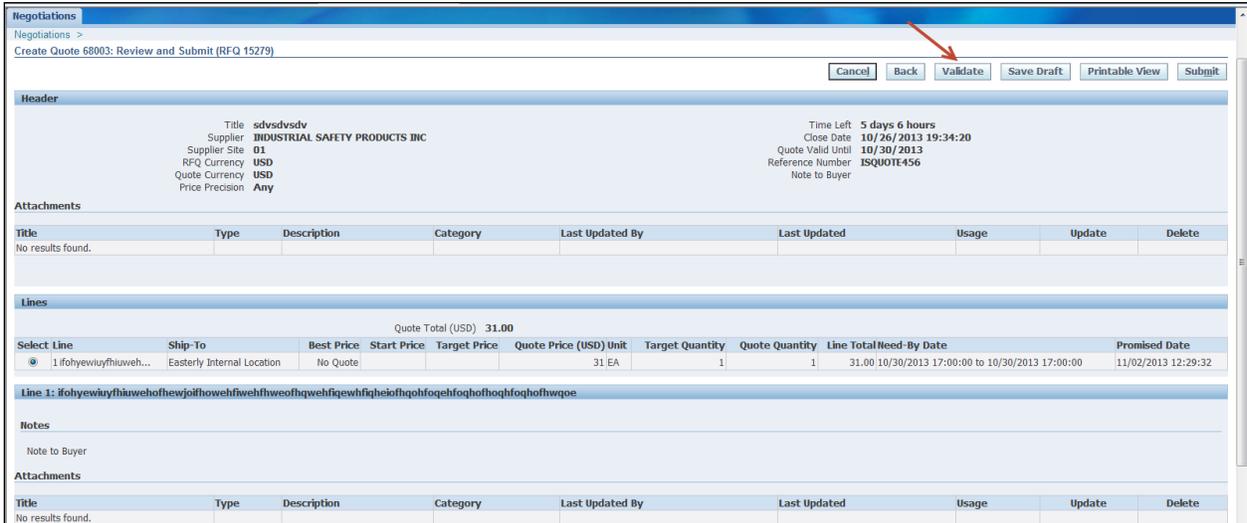
11- Click the **Lines** tab.



The **Lines** window is displayed.

12- Enter the **Quote Price** and **Promised Date** for each line.

13- When complete, click the **Continue** button.



The **Review and Submit** window is displayed.

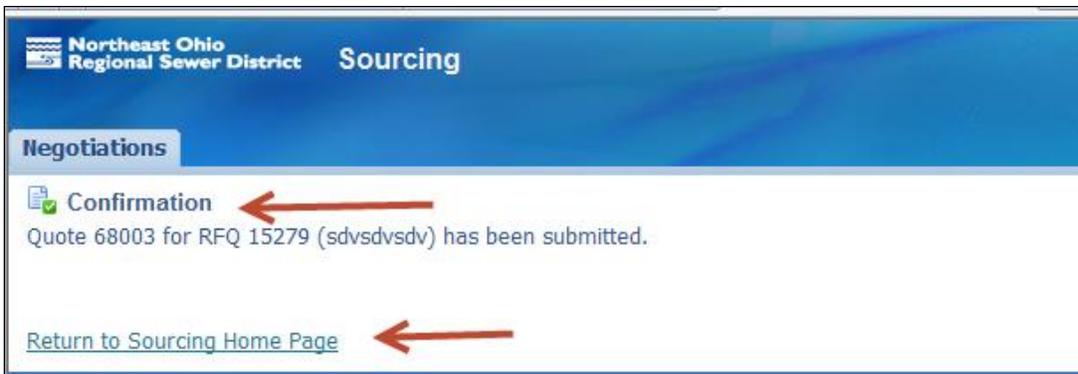
14- Use the **Validate** button to initiate pre-validation of the quote to ensure all required information has been entered prior to submission.

**Note:** At any point in quote creation, the user can click the **Save Draft** button prior to submission, and return to the quote to continue creation in another session.



The **Confirmation** window is displayed to indicate validation with no errors.

15- Click the **Submit** button.

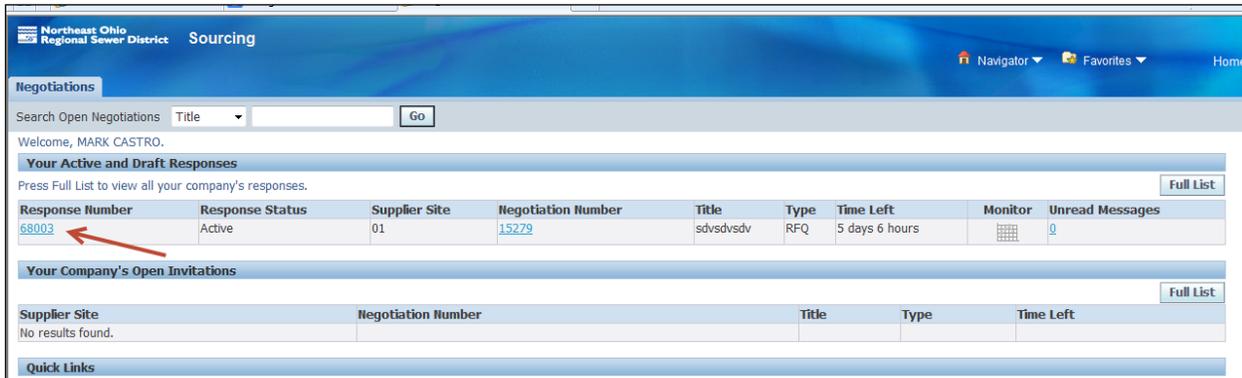


The **Confirmation** window is displayed to confirm successful submission of the quote.

16- Click the **Return to Sourcing Home Page** link.

## Creating Online Discussions

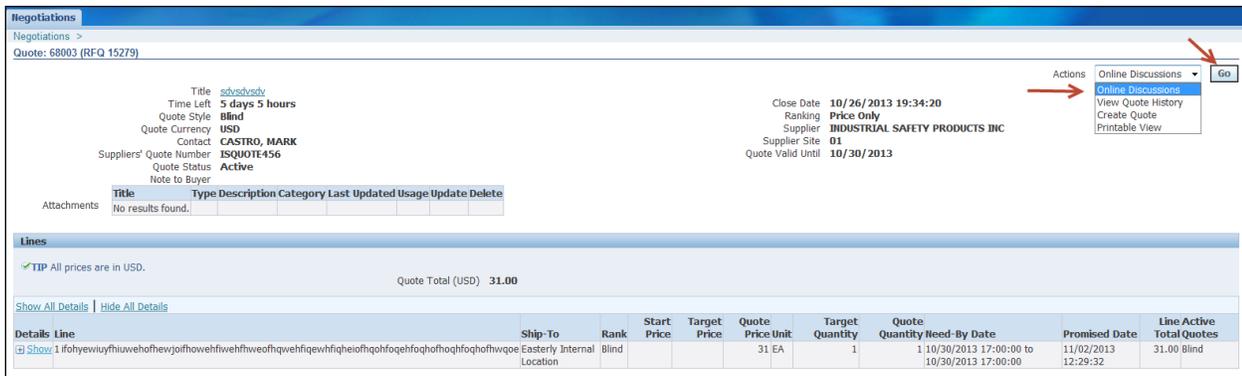
Portal supplier users can utilize the **messaging** capabilities to communicate directly with NEORSR purchasing administrators with questions or requests for more information during negotiations. Users will receive updates when message responses are received from NEORSR personnel.



The screenshot shows the 'Sourcing' page for 'Northeast Ohio Regional Sewer District'. Under the 'Negotiations' tab, there is a search bar and a 'Go' button. Below that, a welcome message for 'MARK CASTRO' is displayed. The main section is 'Your Active and Draft Responses', which includes a 'Full List' button and a table of responses. The table has columns for Response Number, Response Status, Supplier Site, Negotiation Number, Title, Type, Time Left, Monitor, and Unread Messages. A red arrow points to the 'Response Number' 68003. Below this section is 'Your Company's Open Invitations' with another 'Full List' button and a 'No results found.' message. At the bottom, there are 'Quick Links'.

All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

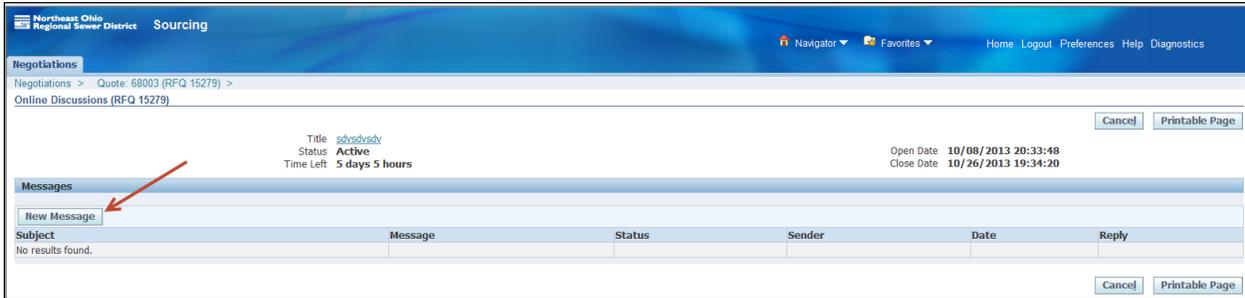
- 1- Click the **link** under the **Response Number** field to open the response.



The screenshot shows the 'Quote: 68003 (RFQ 15279)' window. It displays various quote details such as Title (sdvsdsvd), Time Left (5 days 5 hours), Quote Style (Blind), Quote Currency (USD), Contact (CASTRO, MARK), Suppliers' Quote Number (ISQUOTE456), Quote Status (Active), and Note to Buyer. There is an 'Attachments' section with 'No results found.'. Below this is the 'Lines' section, which includes a 'Quote Total (USD) 31.00' and a table with columns for Details Line, Ship-To, Rank, Start Price, Target Price, Quote Price Unit, Target Quantity, Quote Quantity, Need-By Date, Promised Date, and Line/Active Total Quotes. A red arrow points to the 'Actions' dropdown menu, which has 'Online Discussions' selected. Other options in the menu include 'View Quote History', 'Create Quote', and 'Printable View'. A 'Go' button is also visible next to the dropdown.

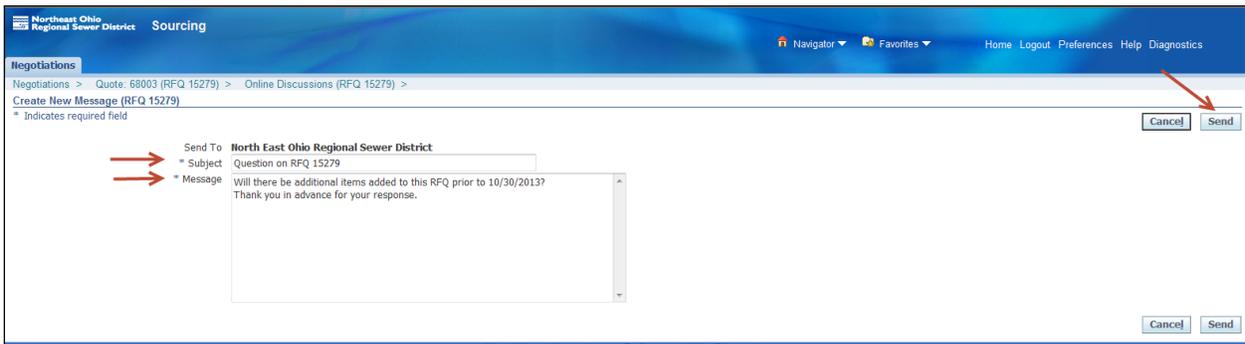
The **Quote** window is displayed.

- 2- To initiate the creation of a **discussion**, select the **Create Discussion** value in the **Actions** box.
- 3- Click the **Go** button.



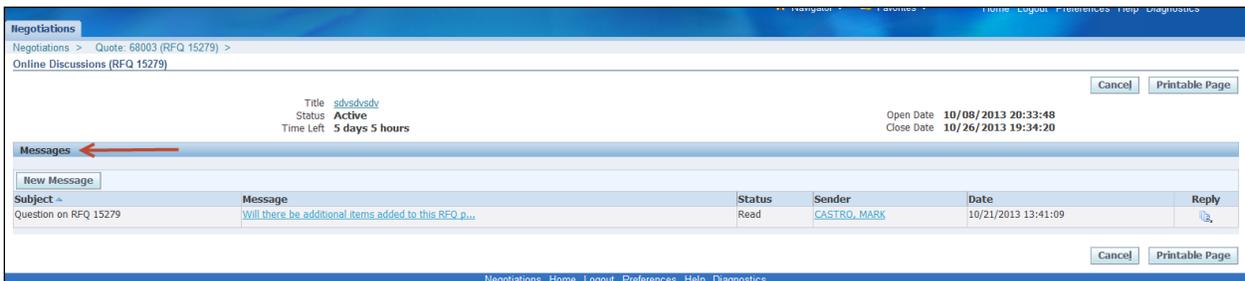
The **Online Discussions** window is displayed. Any previous messages or replies related to this quote will be listed in the **Messages** region of the window.

- 4- Click the **New Message** button.



The **Create New Message** window is displayed. The **Send To** is pre-populated with the appropriate NEORSR recipient address.

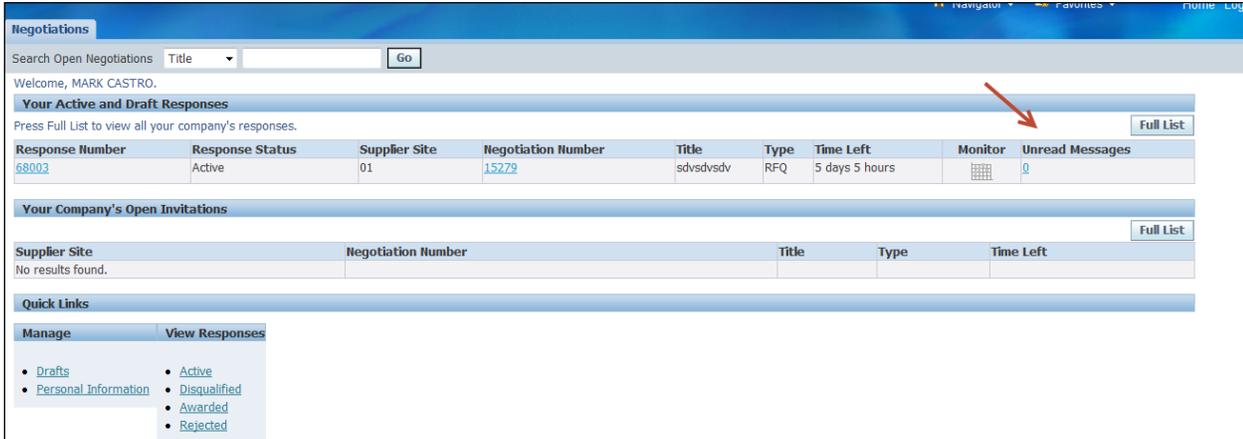
- 5- Enter the desired value in the **Subject** field.
- 6- Enter the desired text (up to 240 characters) in the **Message** field (scrolling field).
- 7- Click the **Send** button.



The **Create New Message** window is closed and user is returned to the **Online Discussions** window.

- 8- Note the inclusion of the new discussion record under the **Messages** region of the window.

# iSupplier Training Guide



The screenshot shows the 'Negotiations' page in the iSupplier system. At the top, there is a search bar for 'Open Negotiations' with a 'Go' button. Below this, a welcome message for 'MARK CASTRO' is displayed. The main section is titled 'Your Active and Draft Responses' and includes a 'Full List' button. A table lists one active response with the following data:

Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
<a href="#">68003</a>	Active	01	<a href="#">15279</a>	sdvsdsvd	RFQ	5 days 5 hours		<a href="#">0</a>

Below the table is a section for 'Your Company's Open Invitations' with a 'Full List' button. At the bottom, there are 'Quick Links' for 'Manage' and 'View Responses', with sub-links for Drafts, Personal Information, Active, Disqualified, Awarded, and Rejected.

The message has now been sent directly to NEORSR purchasing administration.

- 9- Note the **Unread Messages** column in the **Your Active and Draft Responses** section of the **Home Page** window – any reply to your message will display an update to the **link** in this column.

## Summary

Congratulations! You have now learned how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with NEORS D purchasing administrators