



**TRAINING GUIDE – ORACLE ISUPPLIER PORTAL**

**ISUPPLIER PORTAL FUNCTIONS**

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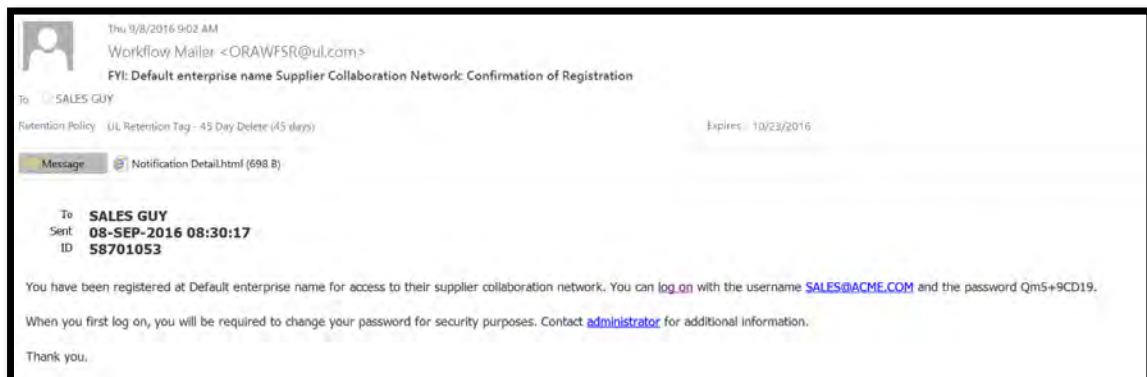
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## LOG IN PAGE

Navigate to the URL that is provided by UL

<https://supplier.ul.com>

1. Enter your user name (will be your email address)
2. Enter your password (will be system generated and sent to you via email)
  - a. You will need to change your password the first time you log in
  - b. Password will need to be at least 8 characters, contain 1 number, no repeating characters and cannot have been used within the last six months.
3. Click the login button
4. Email example:



## ISUPPLIER PORTAL HOMEPAGE

After logging into Oracle and choosing the iSupplier responsibility, the first screen you will see is the iSupplier home page. The Home Page provides top level access to all iSupplier menus, submenus, links and web forms. The users can navigate by selecting the menu tabs or by clicking on the subsequent purchasing process nodes.

Note: If you have more than one responsibility you will be taken an initial page to select your responsibility

Oracle Responsibility: UL iSupplier Portal Admin or UL iSupplier Portal User

Navigate: iSupplier Homepage

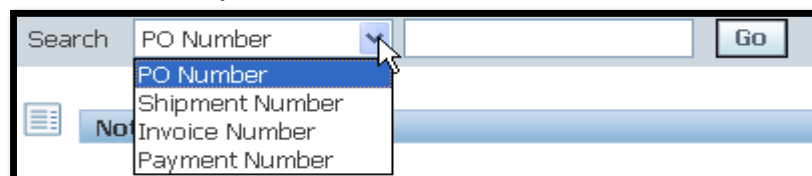
## NAVIGATION AND SEARCHING

### Homepage Overview

1. Quick Links
  - a. This section is displayed on the right and provides a high-level diagram of the procure-to-pay flow through the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.
2. Notifications
  - a. Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the **Notification Details** page. This page provides complete notification details, as well as the appropriate action button.
3. Orders At A Glance
  - a. The last five purchase orders issued to your company will be listed in this section of the homepage. Click on the PO number to drill to the details. Click the full list button to go to the full list of PO's on the Order's tab.
4. Shipments At A Glance
  - a. The last five shipments that you have entered into the system will be listed in this section of the homepage.
5. Home Page Links (upper right hand corner)
  - a. Home - Returns you to the main portal where you can select another responsibility or application.
  - b. Logout - logs you out of the application.
  - c. Preferences - Displays the **Preferences** page.
  - d. Help - Accesses the help page

### Searching

1. Quick Search - The Quick Search feature is available to you from the **Home** page. Using Quick Search, you can look for
  - a. Purchase orders
  - b. Invoices
  - c. Payments



- d. To use the Quick Search:
  1. Select the search type from the Search menu.
  2. Enter a search value.
  3. Click Go.

## **ORDER INFORMATION AND ACTION**

### **PURCHASE ORDERS**

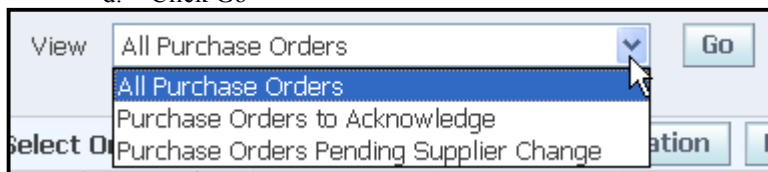
Using purchase order information, you can acknowledge purchase orders, make change requests to purchase orders, split shipments, or cancel orders. You can also view supplier agreements and the revision history of a purchasing document. When the buying company enters a purchase order in Oracle Purchasing, the purchase order details are available to you in Oracle iSupplier Portal.

#### **Viewing Purchase Orders**

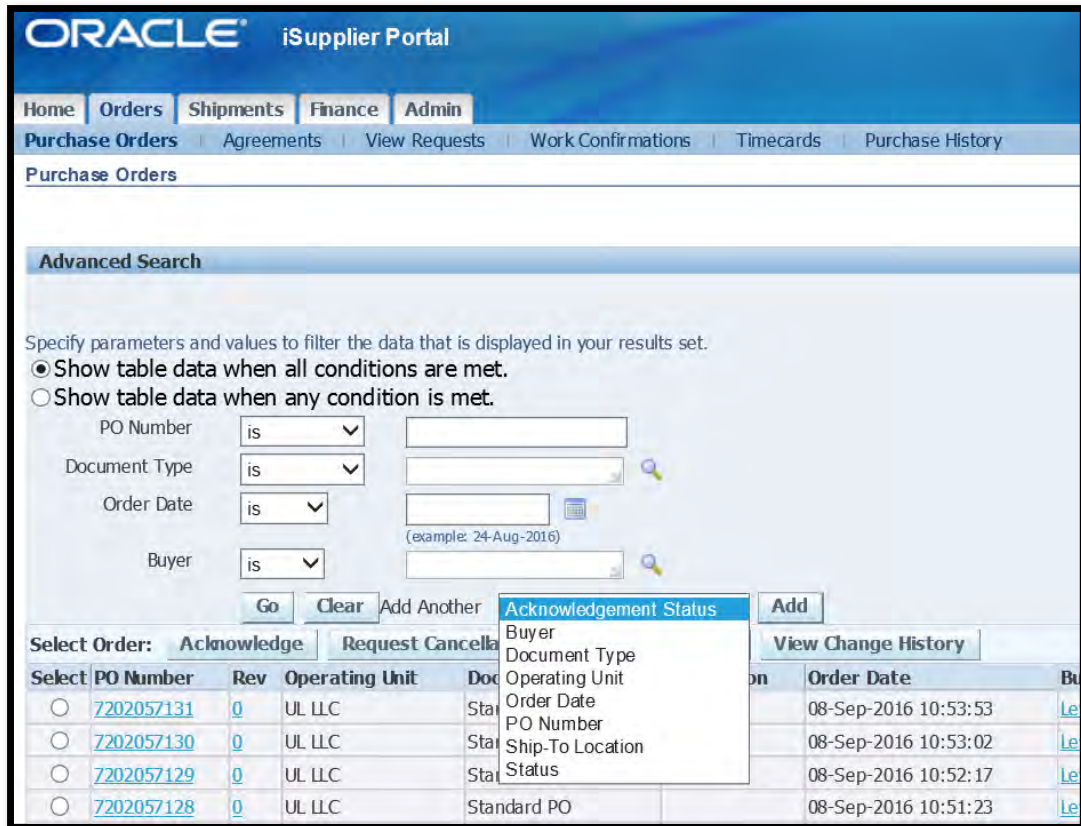
The View Purchase Orders page display the most recent 25 purchase orders (use the Previous and Next links to view additional purchase orders).

Select PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
7202052131	0	UL LLC	Standard PO		08-Sep-2016 10:53:53	Lewis, Michael	USD	55.00	Requires Acknowledgment		
7202052130	0	UL LLC	Standard PO		08-Sep-2016 10:53:02	Lewis, Michael	USD	70.00	Requires Acknowledgment		
7202052129	0	UL LLC	Standard PO		08-Sep-2016 10:52:17	Lewis, Michael	USD	500.00	Requires Acknowledgment		
7202052128	0	UL LLC	Standard PO		08-Sep-2016 10:51:23	Lewis, Michael	USD	1000.00	Requires Acknowledgment		
7202052127	0	UL LLC	Standard PO		08-Sep-2016 10:50:17	Lewis, Michael	USD	77.70	Requires Acknowledgment		
7202052126	0	UL LLC	Standard PO		08-Sep-2016 10:49:22	Lewis, Michael	USD	505.00	Requires Acknowledgment		
7202052125	0	UL LLC	Standard PO		08-Sep-2016 10:46:11	Lewis, Michael	USD	1000.00	Open		
7202052124	0	UL LLC	Standard PO		08-Sep-2016 10:44:39	Lewis, Michael	USD	562.70	Requires Acknowledgment	13-Sep-2016 00:00:00	
7202052123	0	UL LLC	Standard PO		08-Sep-2016 10:43:42	Lewis, Michael	USD	77.70	Requires Acknowledgment	11-Sep-2016 00:00:00	
7202052122	0	UL LLC	Standard PO		08-Sep-2016 10:42:56	Lewis, Michael	USD	505.00	Requires Acknowledgment	09-Sep-2016 00:00:00	
7202052121	0	UL LLC	Standard PO		08-Sep-2016 10:42:14	Lewis, Michael	USD	1000.00	Requires Acknowledgment	09-Sep-2016 00:00:00	

1. From the View menu, choose which purchase orders to display:
  - a. All Purchase Orders
  - b. Purchase Orders to Acknowledge
  - c. Purchase Orders Pending Change
  - d. Click Go



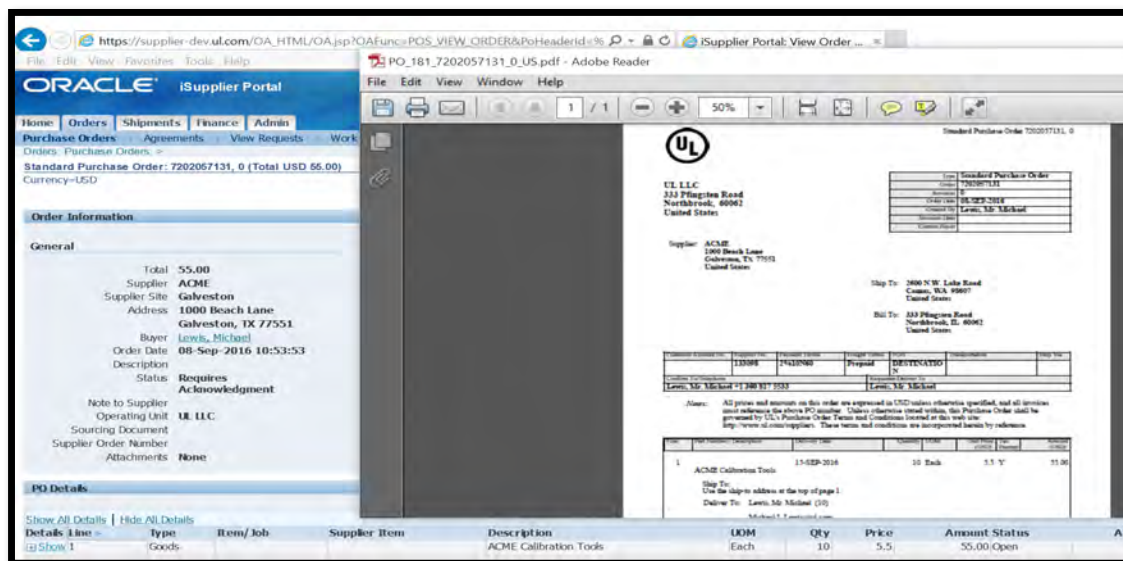
2. Advanced Search
  - a. Click the Advanced Search button to perform a more exact search for a PO.



**Printing Purchase Orders**

From the details of a purchase order you can request a printable view:

1. Click on the PO number you would like to print from the Purchase Orders screen. You will also see the details of the PO on the screen. (shown in background of image below)
2. Select Actions: View PDF and click go to return a PDF file that can be printed





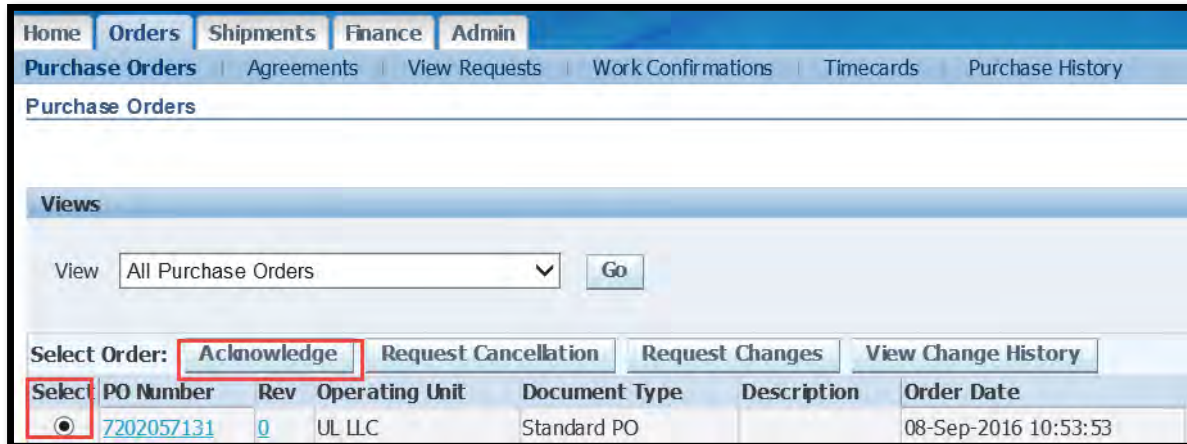
**Acknowledge Purchase Orders**

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

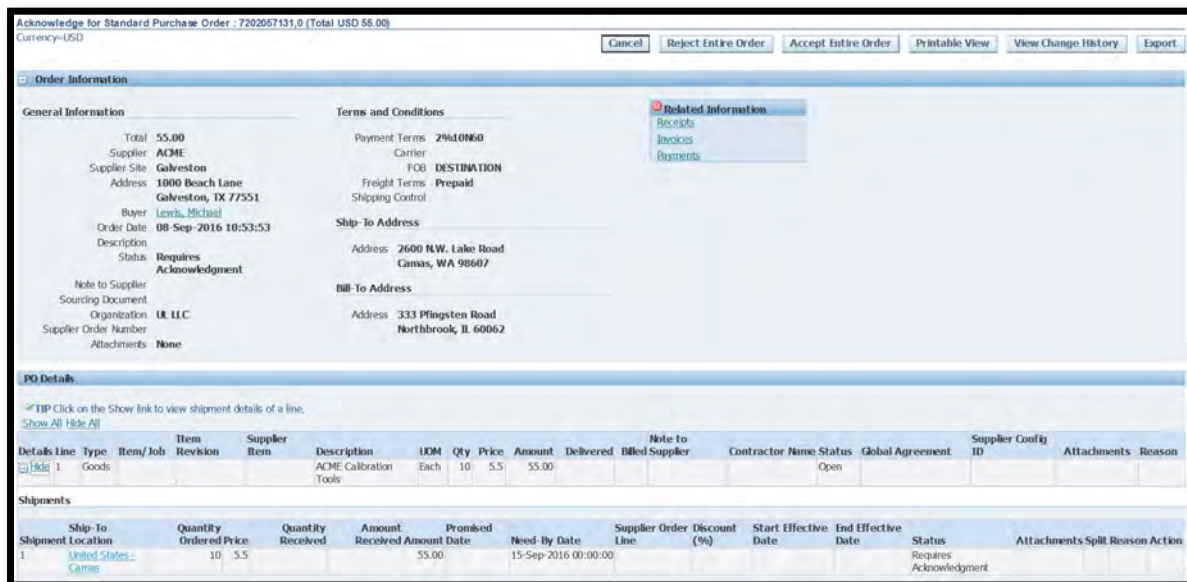
You can either acknowledge the order online, or accept or reject the order using the notification. The notification does not allow shipment level acknowledgment, which must be entered online. When you respond, the purchase order is automatically updated, and a notice is sent to the buyer.

**To acknowledge purchase orders:**

1. Access the purchase order you wish to acknowledge by clicking on the PO number link or by selecting the line and clicking the Acknowledge button



2. On the Acknowledge page, you can accept or reject an entire order, or you can accept or reject individual shipment. To accept/reject an individual line's shipment or pay item, click Show for the line.



3. After clicking the accept button, you can enter a note. Click submit send.



Home Orders Shipments Finance Admin

Purchase Orders Agreements View Requests Work Confirmations Timecards Purchase History

Orders, Purchase Orders > Acknowledge for Standard Purchase Order >

Acknowledge Purchase Order 7202057131

Cancel Submit

Description

Currency USD

Amount 55.00

Order Date 08-Sep-2016 10:53:53

Action Accept

Note to Buyer

Thank you for the order we will deliver on time.

Cancel Submit

- The buyer will receive a notification that the order has been accepted

### Requesting Changes

#### General Changes

#### To submit a single change request:

- Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.
- On the View Purchase Orders page, search for and select the purchase order for which you wish to request changes.
- Select the purchase order and Click Request Changes.
- On the **Request Changes** page, enter your changes.
- You may request changes to the following values :
  - Price/Price Breaks on Blanket Agreements
  - Supplier Item
  - Supplier Order Reference Number
- In the reason text box, enter a reason for your change request.
- If you wish to request changes to shipments. You can request changes to*
  - Price/Price Breaks on Blanket Agreements*
  - Quantity Ordered*
  - Promised Date*
  - Supplier Order Line*
  - Note that you can also enter change request information in the Additional*
- Change Request text box.
- Enter the changed values as appropriate.
- Enter a reason for your change.
- Select the appropriate action.
- Click Submit.

Description: Accepted  
 Status: Thank you for the order we will deliver on time.  
 Reason: Thank you for the order we will deliver on time.  
 Note to Supplier: U.L.L.L.C.  
 Sourcing Document: U.L.L.L.C.  
 Organization: U.L.L.L.C.  
 Supplier Order Number: [Redacted]  
 Attachments: None

Address: 2600 N.W. Lake Road  
 Camas, WA 98607  
 Bill-To Address: 333 Pfingsten Road  
 Northbrook, IL 60062

**PO Details**

TIP You can cancel the entire order or specific lines.  
 TIP Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes.  
[Show All](#) [Hide All](#)

Details Line	Type	Item/Job	Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Note to Billed Supplier	Contractor Name	Status	Global Agreement	Supplier Conf# ID	Attachments	Reason
1	Goods				ACME Calibration Tools	Each	10	5.5	55.00				Open				[Redacted]

**Shipments**

Ship To	Shipment Location	Quantity Ordered	Price	Quantity Received	Amount Received	Amount Promised	Date	Need By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split	Reason	Action
1	United States - Camas	10	5.5		55.00		15-Sep-2016 00:00:00	15-Sep-2016 00:00:00					Accepted			[Redacted]	[Redacted]

**Additional Change Requests**

If you need to submit more changes in addition to those that have been submitted above, you can specify them here.

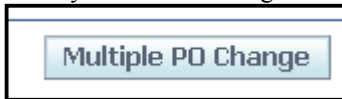
Additional Changes: [Redacted]

Return to Orders: [Purchase Orders](#)

Buttons: Cancel, Cancel Entire Order, Printable View, View Change History, Export, Submit



Reason	Action
date push	Change <input type="checkbox"/>

Note: you can also change multiple orders simultaneously by clicking on the Multiple PO Change button



1. Click on the Multiple PO Change button
2. Search for PO's
3. Select PO's to change
4. Enter default information and apply to the orders or update each line individually

### Splitting Shipments

1. After selecting your Purchase Order, click the show lines icon  and then click the split icon 
2. You will then be able to update the shipment information such as:
  - a. Promised date
  - b. Supplier Order Line
  - c. Reason
  - d. Action.

Shipment	Ship-To Location	Quantity Ordered	Quantity Received	Amount Received	Amount Promised	Promised Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split Reason	Action
1	United States - Camas	5	5.5		55.00	16-Sep-2016 11:33:11	15-Sep-2016 00:00:00					Accepted			Change
2	United States - Camas	5				15-Sep-2016 00:00:00	15-Sep-2016 00:00:00							new date for 5	

3. You can also enter additional details to inform the buyer of other requested changes.

**Additional Change Requests**

If you need to submit more changes in addition to those that have been submitted above, you can specify them here

**Cancellations**

1. After selecting your Purchase Order to cancel, click the request cancellation button
2. Click the Cancel Entire Order Button

Request Cancellation for Standard Purchase Order - 7202057131.0 (Total USD 55.00)  
Currency: USD

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**Order Information**

<p><b>General Information</b></p> <p>Total: 55.00                  Supplier: ACME                  Supplier Site: Galveston                  Address: 1000 Beach Lane, Galveston, TX 77551                  Buyer: Lewis, Michael                  Order Date: 08-Sep-2016 10:53:53                  Description: Accepted                  Status: Thank you for the order we will deliver on time.                  Reason: Note to Supplier: Sourcing Document Organization: UL LLC                  Supplier Order Number: Attachments: None</p>	<p><b>Terms and Conditions</b></p> <p>Payment Terms: 2%10/60                  Carrier: FOB DESTINATION                  Freight Terms: Prepaid                  Shipping Control: <b>Ship-To Address</b>                  Address: 2600 N.W. Lake Road, Camas, WA 98607  <b>Bill-To Address</b>                  Address: 333 Pfingsten Road, Northbrook, IL 60062</p>
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**Related Information**  
[Receipts](#)  
[Invoices](#)  
[Payments](#)

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**PO Details**

TIP: You can cancel the entire order or specific lines.  
 TIP: Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes.  
[Show All](#) [Hide All](#)

Details	Line Type	Item / Item/Job Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Supplier	Contractor Name	Status	Global Agreement ID	Supplier Config	Attachments	Reason
1	Goods			ACME Calibration Tools	Each	10	5.5	55.00					Open				

3. Enter a Reason

**ORACLE iSupplier Portal**

Home | Orders | Shipments | Finance | Admin

Purchase Orders > Agreements > View Requests > Work Confirmations > Timescards > Purchase History

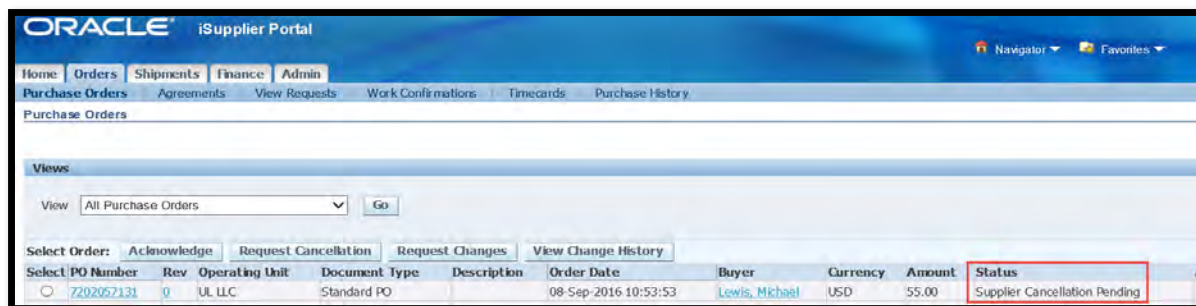
Orders: Purchase Orders > Request Cancellation for Standard Purchase Order >

**Cancel Purchase Order 7202057131**

Description: \_\_\_\_\_  
 Currency: USD  
 Amount: 55.00  
 Order Date: 08-Sep-2016 10:53:53  
 Action: Cancel

\* Reason for Cancellation:

4. Click Submit
5. The order will go into a Supplier Cancellation Pending status until it is accepted by the buyer.

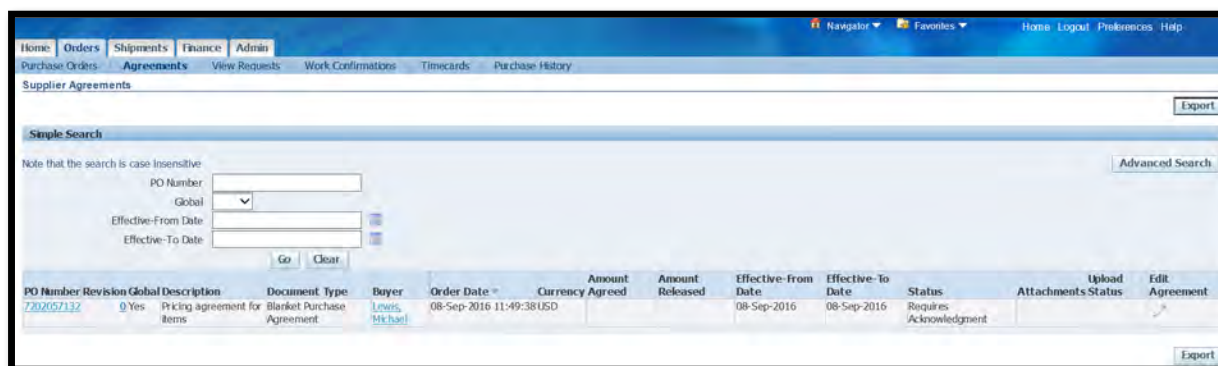


## Agreements

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

## View

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

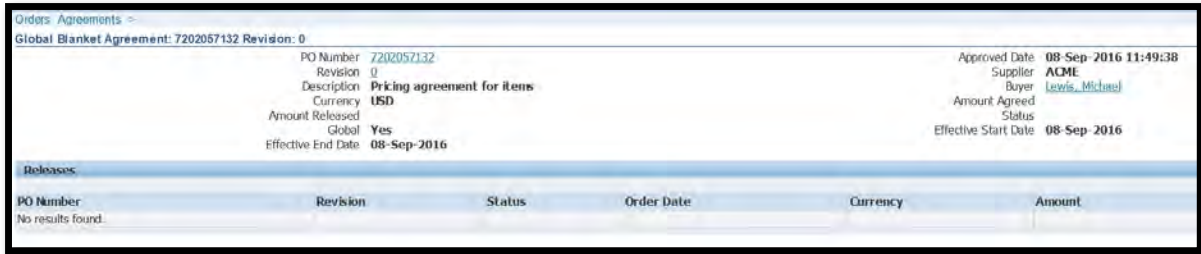


## Request Changes

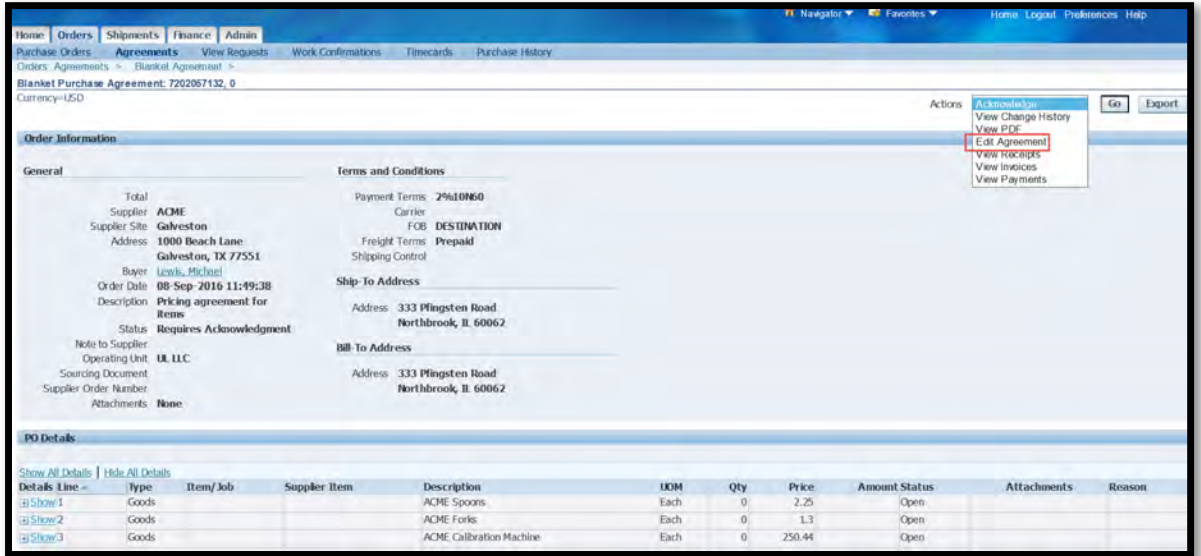
From time to time you may need to update your catalog content at the buyer's site. You can do this by editing the blanket agreement you have with your buyer providing the buyer has enabled the agreement to allow you to do so

### To edit catalog information:

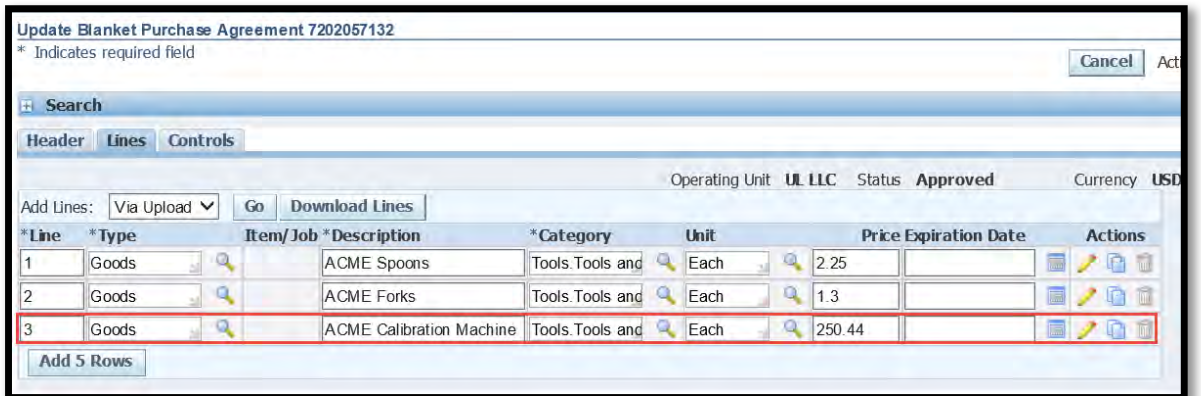
1. Access the blanket purchase agreement.
2. On the **Blanket Purchase Agreement** page, click the purchase number link in the header.
3. This will take you to a screen that provides a view of any/all of the releases that have occurred against this blanket order



4. Click the PO Number (Blanket Agreement Number) at the top of the page to drill down to the agreement
5. On the **View Order Details** page, select Edit Agreement from the Actions menu.



6. Click go and the edit screen will appear



7. Click on the Pencil to make line item detail changes if needed. Example Update price or add a line(add 5 rows)
8. Make changes like adding an item and then click apply
9. Click Submit
10. The Agreement will be sent to the buyer for review and approval



PO Number	Revision	Global Description	Document Type	Buyer	Order Date	Currency	Amount Agreed	Amount Released	Effective-From Date	Effective- to Date	Status	Attachments	Upload	Edit Agreement
720207132	0	Yes Pricing agreement for Items	Blanket Purchase Agreement	Lewis, Michael	08-Sep-2016 11:49:38	USD			08-Sep-2016	08-Sep-2016	Supplier Change Pending			

11. Once the agreement is approved, the buyer's catalog information will be updated.

### Time Cards

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

### View

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

### Purchase History

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

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

### View

To view PO Revision History:

1. From the iSupplier Portal Home page, click the Orders tab, then click the Purchase History subtab.
2. Enter search criteria to identify the purchase order(s) you wish to inspect. Click Go.

PO Number	Rev	Operating Unit	Description	Buyer	Creation Date	Revised Date	Currency	Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
720207133		0.U. LLC		Lewis, Michael	08-Sep-2016 13:15:11		USD	5400.00	United States - Northbrook			
720207132		0.U. LLC	Pricing agreement for Items	Lewis, Michael	08-Sep-2016 11:49:24		USD		United States - Northbrook			
720207131		0.U. LLC		Lewis, Michael	08-Sep-2016 10:53:32		USD	55.00	United States - Northbrook			

## SHIPMENTS

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

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

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



## Delivery Schedules

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

Organization	PO Number	Supplier	Item Description	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Item Carrier Number	Supplier Config ID	Supplier Location	Supplier Site	Promised Date	Need-By Date
UL LLC	7202057134	SCWDVR	ACME Electric Saw	Each	10	0	United States - Camas			ACME	Galveston		15-Sep-2016 00:00:00
UL LLC	7202057134	SCWDVR	ACME Screw Drivers	Each	10	0	United States - Camas			ACME	Galveston		15-Sep-2016 00:00:00

## Shipment Notices

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

Create Advance Shipment Billing Notices

1. Click the Create Advance Shipment Billing Notices Link
2. You will be taken to a search page where you can search for:
  - a. Shipments due this week
  - b. Shipments due anytime
  - c. Or use an advanced search to find detailed lines
3. Select the shipments and click the Add to Shipment Notice button

Select	PO Number	Line	Shipment	Supplier	Item Description	Due Date	Quantity Ordered	Quantity Shipped	Quantity Received	UOM	Ship-To Location	Organization Name	Ship-To Organization	Currency	Supplier Site
<input type="checkbox"/>	7202057134	3	1	SCWDVR	ACME Electric Saw	15-Sep-2016 00:00:00	10	0	0	Each	United States - Camas	UL LLC	UL LLC 720	USD	Galveston
<input type="checkbox"/>	7202057134	2	1	SCWDVR	ACME Screw Drivers	15-Sep-2016 00:00:00	10	0	0	Each	United States - Camas	UL LLC	UL LLC 720	USD	Galveston

4. Enter the line level information such as packing slip and comments
5. Enter the quantity that shipped
6. Click on the Shipment Header tab

Create Advance Shipment Billing Notices

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

Details	PO Number	Line	Shipment	Item	Supplier	Description	Due Date	Quantity Ordered	Quantity Received	UOM	Quantity Shipped	Ship-To Location	Taxable Flag	LPW/Lot/Serial	Attachments	Add	Split	Remove
Show 7202057134	3	1	SCWDVR	ACME Electric Saw	15-Sep-2016 00:00:00	10	0	Each	10	United States - Camas	Y							
Show 7202057134	2	1	SCWDVR	ACME Screw Drivers	15-Sep-2016 00:00:00	10	0	Each	10	United States - Camas	Y							

7. Enter the Shipment Information that applies to the header:
  - a. Shipment Number
  - b. Shipment Date
  - c. Expected Receipt Date
8. Freight Information:
  - a. Freight Terms
  - b. Number of containers
  - c. Bill of Lading
  - d. Packing Slip
  - e. Etc.
9. Enter the Billing Information
  - a. Invoice Number – must be unique
  - b. Invoice Amount – total of lines, freight, and tax.
  - c. Invoice Date
  - d. Freight Amount
  - e. Tax Amount

Shipment Header		Shipment Lines	
<b>Shipment Information</b>			
* Indicates required field			
* Shipment Number	ACME1	* Shipment Date	08-Sep-2016 19:42:03
* Expected Receipt Date	09-Sep-2016 19:42:07	Note: Shipment Date cannot be later than today	
Example: 08-Sep-2016 19:40:03			
<b>Freight Information</b>			
Freight Terms	Vendor pays freight and in	Freight Carrier	
Number of Containers	1	Bill of Lading	
Waybill/Airbill Number		Packing Slip	
Packaging Code		Special Handling Code	
Tar Weight		Tar Weight UOM	
Net Weight		Net Weight UOM	
Comments			
<b>Billing Information</b>			
* Indicates required field			
* Invoice Number	ACME2	* Invoice Amount	592.7
* Invoice Date	08-Sep-2016	Currency: USD	
Freight Amount	10		
Tax Amount	48.36		
Remit To Site			

Total of Invoice: Line Amounts + Freight + Tax. Must be total

10. Click Submit to enter shipment and billing

Home	Orders	Shipments	Finance	Admin
Delivery Schedules	Shipment Notices	Receipts	Overdue Receipts	On-Time Performance
<b>Advance Shipment Notice Confirmation</b>				
<b>Your Advance Shipment Billing Notice ACME1 has been submitted.</b>				
<a href="#">Return to Advance Shipment Notices</a>				

### Canceling Advance Shipment Billing Notices

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

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

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.
2. On the Shipment Notices page, click View/Cancel Advance Shipment Notices.
3. On the View/Cancel Advance Shipment Notices page, search for and select the advance shipment notice you would like to cancel.

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

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

Note: Canceling a shipment notice cannot be undone. You can cancel an ASBN if none of the lines has been received and the invoice has not been paid by the buying company.

## Receipts

Receipt #	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice	Attachments
76600	08-Sep-2016 13:11:42	UL LLC 720								Multiple		
76699	08-Sep-2016 13:11:30	UL LLC 720								Multiple		
76698	08-Sep-2016 13:11:15	UL LLC 720								Multiple		
76697	08-Sep-2016 13:10:52	UL LLC 720								Multiple		

## Overdue Receipts

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

1. Click on Overdue Receipts link
2. Perform simple or advanced search

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM	Quantity Ordered	Quantity Received	Ship To Location	Carrier	Buyer	Supplier Config ID
No results found.												

## On-time Performance

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

1. Click on On-Time Performance link
2. Perform simple or advanced search



On-Time Performance

Simple Search

Note that the search is case insensitive

Organization  PO Number

Due Date  Shipment Number

Receipt Number  Item

Supplier Item  Waybill/Airbill Number

Delivery Status

Go Clear

Organization	PO Number	Due Date	Shipment Number	Receipt Number	Receipt Date	Item Supplier	Item Description	UOM	Quantity Received	Waybill/Airbill Number	Carrier	Delivery Status	Configuration Id
U.L.L.C.	7202057130	15-Sep-2016 00:00:00		26590	08-Sep-2016 13:11:40	SCWDVR	ACME Screw Drivers	Each	10			Early	
U.L.L.C.	7202057129	15-Sep-2016 00:00:00		26590	08-Sep-2016 13:11:40	SCWDVR	ACME Electric Saw	Each	10			Early	
U.L.L.C.	7202057128	15-Sep-2016 00:00:00		26599	08-Sep-2016 13:11:27		ACME Calibration Tools	Each	10			Early	
U.L.L.C.	7202057127	15-Sep-2016 00:00:00		26599	08-Sep-2016 13:11:27	SCWDVR	ACME Screw Drivers	Each	10			Early	
U.L.L.C.	7202057126	15-Sep-2016 00:00:00		26599	08-Sep-2016 13:11:27	SCWDVR	ACME Electric Saw	Each	10			Early	
U.L.L.C.	7202057121	15-Sep-2016 00:00:00		26597	08-Sep-2016 13:10:45		ACME Calibration Tools	Each	10			Early	
U.L.L.C.	7202057124	15-Sep-2016 00:00:00		26598	08-Sep-2016 13:11:12	SCWDVR	ACME Screw Drivers	Each	10			Early	
U.L.L.C.	7202057124	15-Sep-2016 00:00:00		26598	08-Sep-2016 13:11:12	SCWDVR	ACME Electric Saw	Each	10			Early	
U.L.L.C.	7202057123	15-Sep-2016 00:00:00		26597	08-Sep-2016 13:10:45	SCWDVR	ACME Screw Drivers	Each	10			Early	
U.L.L.C.	7202057122	15-Sep-2016 00:00:00		26597	08-Sep-2016 13:10:45	SCWDVR	ACME Electric Saw	Each	10			Early	
U.L.L.C.	7202057125	15-Sep-2016 00:00:00		26599	08-Sep-2016 13:11:12		ACME Calibration Tools	Each	10			Early	

Export

## INVOICES AND PAYMENTS

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

### Creating Invoices

You can submit an invoice online to the buying company based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard or blanket purchase orders that are not fully billed. You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders.

To submit an invoice with a matching purchase order:

1. Click the Finance tab, and then click Create Invoices in the task bar directly below the tabs.
2. On the Invoice Actions page, select Create invoice With a PO and click Go.
3. On the Create Invoice: Purchase Orders page, enter search criteria to identify the purchase order, and click Go.

ORACLE iSupplier Portal

Home Orders Shipments Finance Admin

Create Invoices View Invoices View Payments

Invoice Actions Create Invoice With a PO Go

Search

Note that the search is case insensitive

Supplier  Purchase Order Number

Invoice Number  Invoice Amount

Invoice Date From  Invoice Date To

Invoice Status  Currency

Go Clear

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
No search conducted.									

Create Invoice With a PO Go

4. Select items of the PO to be invoiced and click Add to Invoice. Add as many items as you need (items on your invoice display at the bottom of the page). If you mistakenly add an item to the invoice, you can select it and click Remove from invoice.

5. When finished adding items, click Next.
6. On the Create Invoice: Details page, enter an invoice number and remit to address (if it does not default). Enter a tax amount for this transaction. You can also update the quantity. Enter any additional information such as attachments, and then click Next.

7. On the Create Invoice: Manage Tax page, you can view the tax information generated, as it is based off of the tax amount you entered on the invoice header.



**Supplier**

- \* Supplier: ACME
- \* Tax Payer ID: Galveston
- \* Remit To: Galveston
- Address: 1000 Beach Lane Galveston TX 77551
- Remit To Bank Account: XXXXXXX6789
- Unique Remittance Identifier: XXXXXXX6789
- Remittance Check Digit:

**Invoice**

- \* Invoice Number: ACME1
- \* Invoice Date: 08-Sep-2016
- Invoice Type: Standard
- \* Currency: USD
- Invoice Description:
- Pre-Approved:
- Secondary Approver:
- Attachment: None

**Customer**

- \* Customer Tax Payer ID: 94-3282454
- Customer Name: IL LLC
- Address: 333 Pflugston Road Northbrook 60062 US

**Summary Tax Lines**

Tax Rate Code	Tax Rate	Tax Amount
USWA_720_P2P_682	8.4	5.88

**Items**

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
7202057130	2	1	ACME Screw Drivers	SCWDR	United States - Camas	10	10.00 Each	7.00	70.00

**Shipping and Handling**

Charge Type: No results found.

**Invoice Summary**

Item	Amount
Items	70.00
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	5.88
<b>Recalculate Total</b>	<b>Total (USD)</b>
	75.88

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

**Supplier**

- \* Supplier: ACME
- \* Tax Payer ID: Galveston
- \* Remit To: Galveston
- Address: 1000 Beach Lane Galveston TX 77551
- Remit To Bank Account: XXXXXXX6789
- Unique Remittance Identifier: XXXXXXX6789
- Remittance Check Digit:

**Invoice**

- \* Invoice Number: ACME1
- \* Invoice Date: 08-Sep-2016
- Invoice Type: Standard
- \* Currency: USD
- Invoice Description:
- Pre-Approved:
- Secondary Approver:
- Attachment: None

**Customer**

- \* Customer Tax Payer ID: 94-3282454
- Customer Name: IL LLC
- Address: 333 Pflugston Road Northbrook 60062 US

**Items**

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
7202057130	2	1	ACME Screw Drivers	SCWDR	United States - Camas	10	10.00 Each	7.00	70.00

**Shipping and Handling**

Charge Type: No results found.

**Summary Tax Lines**

Tax Regime Code	Tax	Tax Status Code	Tax Jurisdiction Code	Tax Rate Code	Tax Rate	Tax Amount
SDX_REGIME_US	USWA_720_P2P_682	USWA_720_P2P_682	WA - STATE SALES/USE TAX	USWA_720_P2P_682	8.4	5.88

**Invoice Summary**

Item	Amount
Items	70.00
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	5.88
<b>Total (USD)</b>	<b>75.88</b>

- A Confirmation page is generated informing you of successful invoice creation.

**Supplier**

- \* Supplier: ACME
- \* Tax Payer ID: [blank]
- \* Remit To: Galveston
- \* Address: 1000 Beach Lane Galveston TX 77551
- \* Remit To Bank Account: XXXXXX789
- \* Unique Remittance Identifier: [blank]
- \* Remittance Check Digit: [blank]

**Invoice**

- \* Invoice Number: ACME1
- \* Invoice Date: 08-Sep-2016
- \* Invoice Type: Standard
- \* Currency: USD
- \* Invoice Description: [blank]
- Pre-Approved Secondary Approver Attachment: None

**Customer**

- \* Customer Tax Payer ID: 94-3282454
- \* Customer Name: BL LLC
- \* Address: 333 Pflugstein Road Northbrook 60062 US

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity to Invoice	Unit Price	Amount
7202057130	2	1	ACME Screw Drivers	SCWDVR	United States - Camas	10	10.00 Each	7.00	70.00

**Shipping and Handling**

Charge Type: No results found.

**Summary Tax Lines**

Tax Regime Code	Tax	Tax Status Code	Tax Jurisdiction Code	Tax Rate Code	Tax Rate	Tax Amount
SDX_REGIME_US	USWA_720_F2P_682	USWA_720_F2P_682	WA - STATE SALES/TUSE TAX	USWA_720_F2P_682	8.4	5.88

**Invoice Summary**

Item	70.00
Less Rebate	0.00
Freight	0.00
Miscellaneous	0.00
Tax	5.88
<b>Total (USD)</b>	<b>75.88</b>

**Viewing Invoices**

**To view invoice information:**

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Invoices subtab.
2. On the View Invoices page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.

**Simple Search**

Invoice Number: [input]  
 PO Number: [input] (example: 1234)  
 Release Number: [input] (example: 1234-2)  
 Payment Number: [input]  
 Invoice Status: [dropdown]  
 Go Clear

Payment Status: [dropdown]  
 Invoice Amount From: [input] To: [input]  
 Amount Due From: [input] To: [input]  
 Invoice Date From: [input] To: [input]  
 Due Date From: [input] To: [input] (example: 24-Aug-2016)

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	Payment PO Number	Receipt Date	Discount	Available Discount	Attachments
ACME1	08-Sep-2016	Standard	USD	75.88	75.88 In-Process		Not Paid			07-NOV-2016	7202057130	18-Sep-2016		1.40	

3. When the search results display, click the invoice number link to view details of the invoice. (You can also view any associated purchase order(s), payments, or scheduled payments by clicking their links).
4. On the Invoice Details page, you can see the header level information.

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	ACME Screw Drivers	10	Each	7.00		70.00	0.00 In-Process	7202057130	2	1	Lewis, Michael	
2	Tax	SBX_REGIME_US - USWA_720_P2P_682					5.88	0.00 In-Process					

- To view invoice line information, click the Invoice Lines tab. You can also view any scheduled payments and any hold information.

Due Date	Amount	Remaining Amount	Remit-to Supplier	Remit-to Supplier Site	Status	Method
7-Nov-2016	75.88	75.88			Not Paid	Check

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

### Viewing Payments

#### To view payment information:

- On the iSupplier Portal Home page, click the Finance tab, then click the View Payments subtab.
- On the View Payments page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.
- When the search results display, click the payment number link to view details of the payment. (You can also view any associated purchase order(s), or invoices by clicking their links).
- On the Payments details page, you can see the payment details including the invoices addressed by the payment.

Payment	Remit-to Supplier	Remit-to Supplier Site	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
<a href="#">442580</a>	ACME	Galveston	08-Sep-2016	USD	75.88	Check	Negotiable	08-Sep-2016	70600 LLC BOA Disbursements	ACME1	7202057130

## **ADMINISTRATOR (ADMIN) TAB**

After logging into Oracle and choosing the iSupplier responsibility, the first screen you will see is the iSupplier home page. The Home Page provides top level access to all iSupplier menus, submenus, links and web forms. The users can navigate by selecting the menu tabs or by clicking on the subsequent purchasing process nodes.

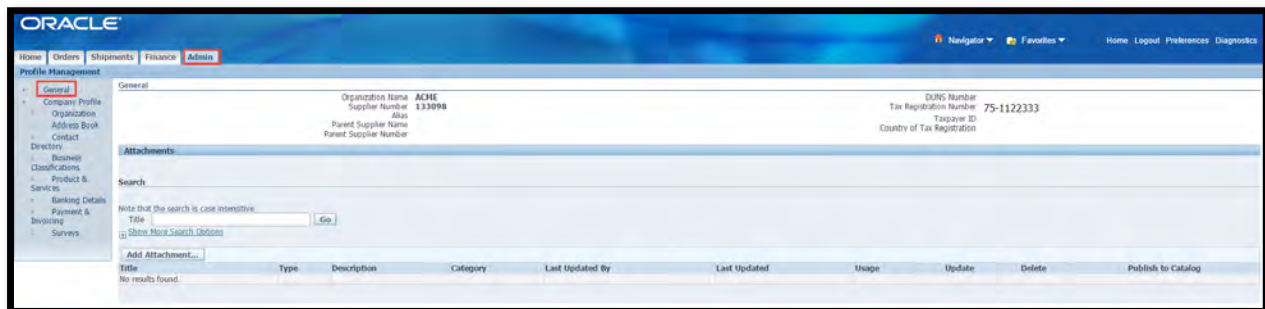
Note: If you have more than one responsibility you will be taken an initial page to select your responsibility

Oracle Responsibility: UL iSupplier Portal Admin or UL iSupplier Portal User

UL iSupplier Portal Admin has access to the Admin tab.

UL iSupplier Portal User does not have access to the Admin tab.

Navigate: iSupplier Homepage → Click on Admin tab



## **GENERAL**

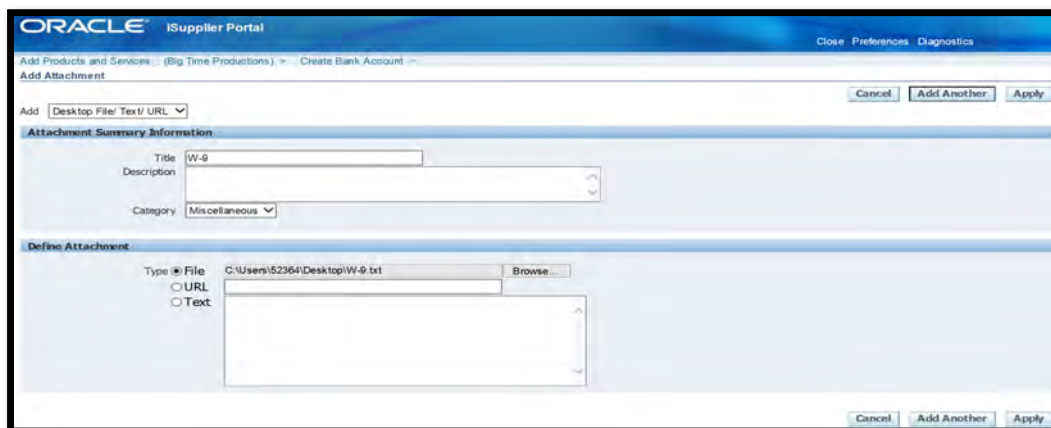
After clicking on the Admin tab, you will be taken to the General information section of you administrative functions.

You will see some information that you cannot update from this page such as your organization name, supplier number and tax registration information.

You can also manage your attachments from this page.

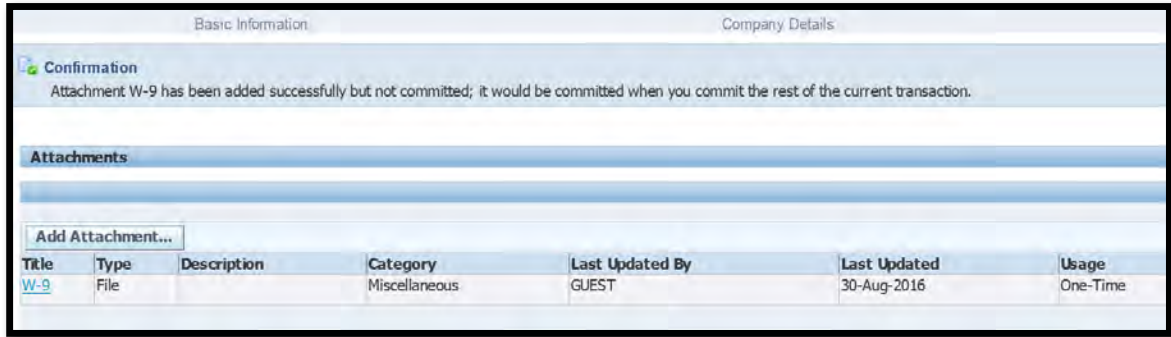
### **Attachments**

1. Click Add Attachments – you can add files, text or even a link to a URL
  - a. Enter a title
  - b. Change the category to Miscellaneous
  - c. Click File and browse your local machine for W-9 information



- d. Click Apply
- e. Receive Confirmation
- f.



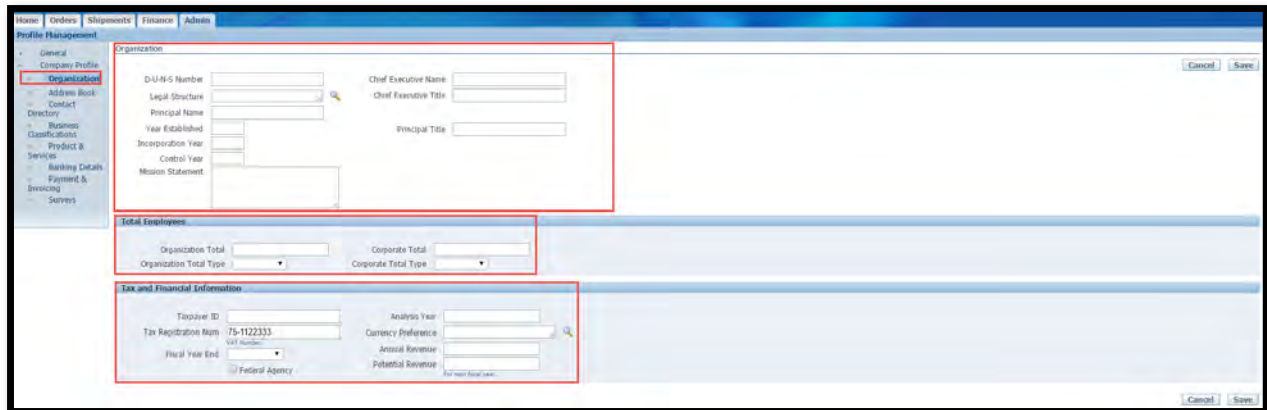


## ORGANIZATION

Click on the Organization link to update information about your business. This includes updating:

- Organization information
- Total Employee information
- Tax and Financial information

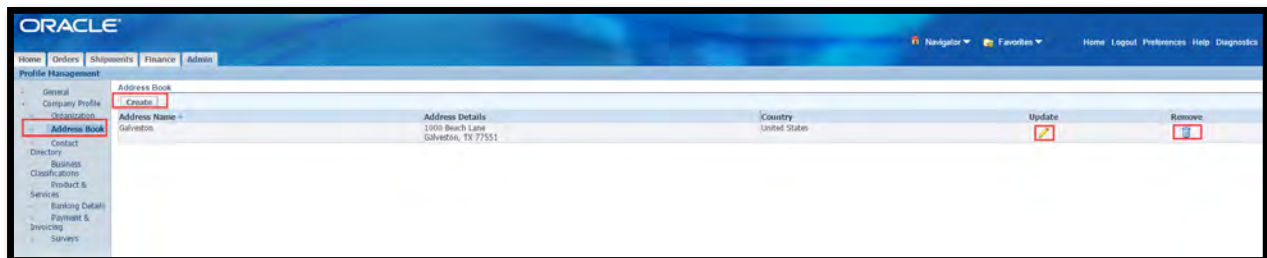
Updating this information does not require approval from your UL Supplier contact.



Make changes and save your work.

## ADDRESS BOOK

Click on the Address Book link to manage the various addresses that are associated with your company. Please note that any changes to this section will require approval by a UL resource.



### Create Address

Click on Create button to add a new address

Enter address information and Save

**Update Existing Address**

Click on the update pencil icon to alter an existing address information.

Make changes and click save.

**Delete Existing Address**

Click the trashcan icon to delete an existing address.

**CONTACT DIRECTORY**

The Contact Directory allows you to maintain the contacts for your company that are authorized to access the UL systems and that UL should be in contact with for various transactions. If the user has a check mark under the User Account column, then they have the ability to log into UL's Oracle system. Any changes and/or updates to contacts and users will require UL approval.

Note these contacts should be the key sales and accounts receivables people of your organization. By default all iSupplier users will receive notifications on new and revised purchase orders.

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Addresses	Update
New User	Acme	ACME	409-867-5309	newuser@acme.com	Current			
Sales	Guy	ACME	409-556-7104	Sales@acme.com	Current	✓		

**Create Contact**

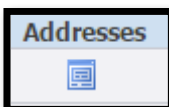
1. Click the Create button



2. Enter the contact information. First name, last name, etc.
3. If you would like to provide this user with access to the UL iSupplier Portal, select the Create User Account for this Contact check box.
  - a. Select your Supplier Name ( only one in list)
  - b. The user name will be the email address from above. Please leave as such.
4. If this contact should be receiving certification reminders select that choice.
5. You will be able to select the type of access the new contact has when they access UL systems.
6. If for some reason you would like to restrict this contact's access to a particular business site, you can opt to modify sites and restrict them to a particular site (s).
7. Click Apply when finished.
  - a. The new user will be sent an email with a user name and password.
8. The user will need to

### Contact Addresses

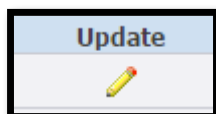
If you would like a particular contact to be the primary/default contact for an address site, then click on the Addresses icon to create the association.



1. Click Add Another Row to add another address and save.

### Update Contact

To update an existing contact click the pencil icon



Admin Profile Management Contact Directory

Update Contact

Indicates required field

Contact Title

First Name Sales

Middle Name

Last Name Guy

Alternate Name

Job Title Sr Vp of Sales

Department

Email Address Sales@acme.com

Phone Area Code 409

Phone Number 556-7104

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date

User Account Information

Username SALES@ACME.COM

Inactive Date 31-Dec-4712

Reset Password

User Notifications

Responsibilities

Select All | Select None

Select Responsibility

UL - Supplier Portal Admin

UL - Sourcing Supplier User

Applications

Supplier Portal

Sourcing

User Access Restrictions

Make any updates that are required to the user information.

### **User Password Reset**

Select the Reset Password check box and apply to generate a new password.

### **Inactivate Existing User**

Enter a current inactive date for the User Account and above in the Update contact section.

## **BUSINESS CLASSIFICATIONS**

The business classification section allows you to maintain pertinent Business Classification information and recertify as needed. Any changes to these values will require approval by UL.

Profile Management

Business Classifications

Certification

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

Last Certified 28-Sep-2016 By Sales Guy

TIP Date format example: 28-Sep-2016

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Critical Consumables	<input type="checkbox"/>				
Hub Zone	<input type="checkbox"/>				
HQIR Issuing Agency	<input type="checkbox"/>				
Minority Owned	<input type="checkbox"/>				
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input checked="" type="checkbox"/>		12345		
Veteran Owned	<input checked="" type="checkbox"/>		334466		
Women Owned	<input type="checkbox"/>				

Save any changes made.

## **BANKING INFORMATION**

Manage your companies banking information through the iSupplier Portal. Any changes to the banking information will require approval from UL.



Search and Select: Bank Name

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 Bank Name CHASE Go

**Results**

Select	Quick Select	Bank Name	Bank Number
<input type="radio"/>		CHASE	
<input type="radio"/>		CHASE BANK	
<input type="radio"/>		CHASE BANK	071000013
<input type="radio"/>		Chase JP Morgan	
<input type="radio"/>		Chase Manhattan Bank	
<input type="radio"/>		CHASE TEXAS	

About this Page

Cancel Select

- To page through the results, click on Next 10 until you see your bank's name. Click on the Quick Select button to choose your bank.
- Next Choose an Existing Branch and click on the magnifying glass to search for your branch.

**Branch**

New Branch

Existing Branch

Branch Name

Branch Number

BIC

Branch Type ABA

Show Branch Details

- Using the quick select button select the appropriate site and click select.

Search and Select: Branch Name

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 Branch Name SUPPLIER Go

**Results**

Select	Quick Select	Branch Name	Branch Number	Bank Name	Bank Number	BIC	Branch Type
<input type="radio"/>		SUPPLIER ACH 120910	071000013	CHASE BANK	071000013		ABA
<input type="radio"/>		SUPPLIER-1	071000013	CHASE BANK	071000013		ABA
<input type="radio"/>		SUPPLIER-2	071000013	CHASE BANK	071000013		ABA
<input type="radio"/>		SUPPLIER 126604	071000013	CHASE BANK	071000013		ABA
<input type="radio"/>		SUPPLIER	071000013	CHASE BANK	071000013		ABA

- If your Bank does not exist, then choose the New Bank button and complete the Bank Name field.
- Select New Branch and complete the following fields:
  - Branch Name
  - Branch Number (routing number)
  - Branch Type
  - Address Line 1
  - City

- 15. State
- 16. Zip

- 17. Complete the following fields for bank account:
- 18. Account Number
- 19. IBAN (if applicable)
- 20. Account Name (optional)
- 21. Currency

- 22. Click Apply when finished you will be returned to the Details page
- 23. Click Next

## PAYMENT INFORMATION

Click the Payment Information link to update your company payment information such as method and currency.

Save your work after making changes.