

Quick Guide 5: iSupplier Profile

iSupplier Portal

iSupplier Portal Changes

The supplier can make changes to:


- General Company Information,
- CPV Codes,
- Address Book,
- Contact Directory,
- Business Classification,
- Banking Details.

With the exception of General Company Information and CPV Codes, all supplier changes must be approved by the authority. The supplier is notified when approval is given.

Address Book

Click the 'Admin' link and then the 'Address Book' link.

- You can Create or Inactivate an Address.

Home	Orders	Shipments	Finance	Admin
Profile Management				
• General				
• Company Profile				
○ Organization				
○ Address Book				
○ Contact Directory				
Address Book - If changing address the old address must be end dated before a new address is created.				
Create				
Address Name	Address Details	Country	Update	Inactivate Address
LA8 2UQ	95 WHATLINGTON ROAD COTES LANCASTER LA8 2UQ	United Kingdom		

Create Address: to add a new address, instead of, or in addition to, the existing address.

- Click the 'Create' button;
- Address Name; enter the Post Code;
- Note: a star (*) identifies a mandatory field;
- Enter the new address and phone number.

The screenshot shows the Oracle iSupplier Portal interface. At the top, there's a blue header with the Oracle logo and 'iSupplier Portal' text. Navigation links include 'Navigator', 'Favorites', 'Home', and 'Logout'. Below the header, a breadcrumb trail reads 'Admin: Profile Management: Address Book >'. The main title is 'Create Address'. A note indicates that an asterisk (*) denotes a required field. The form is divided into two columns. The left column contains fields for 'Supplier Name' (pre-filled with '01 SUPPLIER'), 'Address Name' (with a hint to include spaces in the postcode), 'Country' (a dropdown menu currently showing 'United Kingdom'), 'Address Line 1' through 'Address Line 4', 'City/Town/Locality', 'County', 'Postal Code', 'Phone Area Code', and 'Phone Number'. The right column contains 'Supplier Number' (pre-filled with '8'), 'Email Address' (with a hint that it's for electronic purchase orders), and three checkboxes: 'Purchasing Address', 'Payment Address', and 'RFQ Only Address', each with a brief explanation of its use. At the bottom right of the form are 'Cancel' and 'Save' buttons. Below the form is a 'Note' section with a text area and a hint to include additional details about the address type and changes.

- Enter the email address used for purchase orders in 'Email Address';
- Use the tick boxes to identify if this address is used for purchasing and / or payment, or just for quotes;
 - You must have at least one purchasing and one payment address, although these can be the same;
- Add additional relevant information in the 'Note' box;
- Click the 'Save' button
- Check the confirmation message is displayed.

Each supplier address has a bank account and at least one contact associated with it:

- **Contact Directory/Manage Address:** ensure you add at least one contact for this address.
 - This will enable the named contact to view the purchase orders and raise invoices etc for the new address details on the portal.
- **Banking Details:** Add the bank account to be used for this address.
 - This will enable payments to be made for orders from the new address.

Inactivate Address: to delete an address no longer used.

- Click the 'Remove' button against the relevant line;
- Acknowledge the warning;
- Check the confirmation message is displayed.
- Please ensure you have at least one active address at all times.

Change of Address:

- Create the new address, as above;
 - Inactivate the previous address, as above;
 - Add the address of at least one contact, or create a new contact if applicable, as below;
 - Add the address to the bank details, or create new bank details if applicable, as below.
-

Contact Directory

- Click the Admin link and then the Contact Directory link.
- Please ensure all contacts and their email addresses are accurate and up to date.
- If the contact has access to the iSupplier Portal, it is the supplier's responsibility to remove contacts if they leave your employment or no longer require access.
- Contacts must be associated with the organisation's address(es) to enable access to the portal.
- You can Create, Update, Remove or manage Addresses for a contact.

Home

Orders

Shipments

Finance

Admin

Profile Management

• General

• Company Profile

○ Organization

○ Address Book

○ **Contact Directory**

○ Business Classifications

Contact Directory : Active Contacts

Create

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
JAMES	SMITH	447906 332211	LUKEPO@TOYS.CO.UK	Current	✓			
LUKE	SMITH	447906 111222	LUKE@TOYS.CO.UK	Current	✓			

Contact Directory : Inactive Contacts

Create Contact: To add a new contact. Please note: When a new contact is added, access to the portal will be given. If this is not required, please inform the authority after the contact is set up.

- Click the 'Create' button;
- Enter the contact details including their email address; this will become their username;

The screenshot shows the 'Create Contact' form in the Oracle iSupplier Portal. The breadcrumb trail is 'Admin: Profile Management: Address Book > Contact Directory: Active Contacts >'. The form title is 'Create Contact'. A note states '* Indicates required field'. The form contains several input fields: 'Contact Title' (a dropdown menu), '* First Name', 'Middle Name', '* Last Name', 'Alternate Name', 'Job Title', 'Department', '* Contact Email' (with a note: 'This email address will become your user account name. Please do not use generic email addresses'), and 'Url'. On the right side, there are fields for '* Phone Area Code' (with a note: 'Please include country dialing code.'), '* Phone Number', 'Phone Extension', 'Alternate Phone Area Code', and 'Alternate Phone Number'. 'Cancel' and 'Save' buttons are located at the top right of the form.

- Click the 'Save' button;
- Check the confirmation message is displayed.
- Click the 'Manage Address' button against the relevant line to notify the authority of your organisation's address(es) for which this person is a contact;
- Click 'Add Another Row' (your organisation's address is set up but needs to be added to the contact);

The screenshot shows the 'Address Associations for Contact' page. The breadcrumb trail is 'Admin: Profile Management: Contact Directory >'. The page title is 'Address Associations for Contact'. A note states 'The addresses associated with the contact can be maintained in this page.' There is a table with three columns: 'Address Name', 'Address Details', and 'Remove'. The 'Address Name' column has a search icon (magnifying glass) and a text input field. The 'Remove' column has a trash can icon. Below the table is an 'Add Another Row' button. 'Cancel' and 'Save' buttons are located at the bottom right of the page.

- Click the 'Search' icon (magnifying glass);
- Click the 'Go' button to search for all addresses set up for the supplier;
- Click 'Quick Select' for the relevant address this person;


Create Contact: (cont.)

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 Address Name

Results

Select	Quick Select	Address Name	Address Details
<input type="radio"/>		CB2 6AY	58 HASLEMERE ROAD, EATON FORD, BARRINGTON, CHESTER, CHESHIRE, CHESHIRE, GB

[About this Page](#)

- Repeat the procedure if this person is a contact for more than one address
- Click the 'Save' button;
- Check the confirmation message is displayed.

Update Contact: update or amend details of an existing contact.

- Click the 'Update' icon against the relevant line;
- The existing contact details will be displayed.
- Make the changes required. Check the email address is accurate – if you forget your password, you will be issued with a temporary password via this email address;
- Click the 'Save' button;
- Check the confirmation message is displayed.

Remove Contact: to remove a listed contact.

- This will end access to the portal.
- Check that you are removing the correct contact; you will not receive a warning;
- Click the 'Remove' button against the appropriate line;
- Check the confirmation message is displayed.

Business Classification

- Click the 'Admin' link and then the 'Business Classification' link.
 - Select classifications as appropriate, e.g. click on the 'Supplier Classification' drop down list to enter or amend your classification;
 - Ensure you tick the applicable box next to any classifications added or amended;

Oracle iSupplier Portal

Home Orders Shipments Finance Admin

Admin: Profile Management: Address Book > Contact Directory : Active Contacts >

Business Classifications

Cancel Save

Certification

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

Last Certified **03-Jan-2013** By **MICHAEL BARBER**

TIP If you are categorised as an SME (Small Medium Enterprise) please select flag. If you are required to submit WGA (Whole of Government Accounts) returns, please select the flag and enter your CPID (Counter Party Identification) code in the available field. Date format example: 20-Feb-2013

Classification	Applicable	Classification Type	Certificate Number	Certifying Agency	Expiration Date
Business Classification	<input checked="" type="checkbox"/>	CATERING			
Small Business	<input type="checkbox"/>				
Whole Government Account	<input type="checkbox"/>				

- If you have made any changes, tick the certification box above;
- Click the 'Save' button;
- The certification shows this was last updated today and your name is displayed.

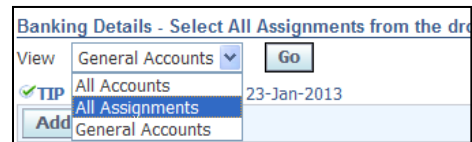
Banking Details

Click the 'Admin' link and then the 'Banking Details' link.

Ensure the details you input are correct; your payments will be made into the account entered.

Create an Account: to change or correct the account held.

- Select 'All Assignments' from the 'View' drop down list;
- Click the 'Go' button;

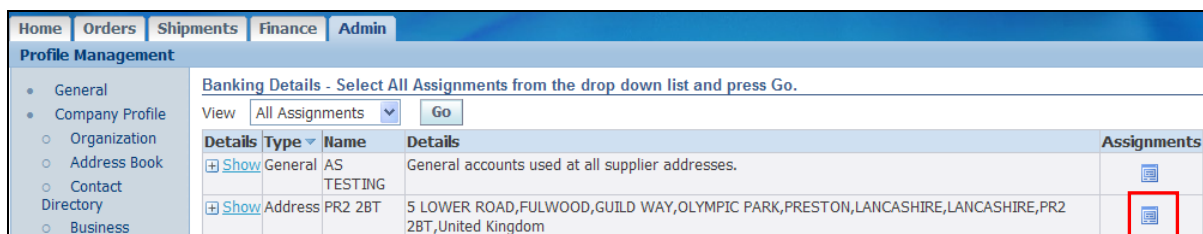


Banking Details - Select All Assignments from the drop down list and press Go.

View: General Accounts [Go]

✓ TIP All Accounts 23-Jan-2013

Add All Assignments General Accounts



Home Orders Shipments Finance Admin


Profile Management

- General
- Company Profile
 - Organization
 - Address Book
 - Contact Directory
 - Business

Banking Details - Select All Assignments from the drop down list and press Go.

View: All Assignments [Go]


Details	Type	Name	Details	Assignments
[+ Show]	General	AS TESTING	General accounts used at all supplier addresses.	[+]
[+ Show]	Address	PR2 2BT	5 LOWER ROAD, FULWOOD, GUILD WAY, OLYMPIC PARK, PRESTON, LANCASHIRE, LANCASHIRE, PR2 2BT, United Kingdom	[+]

- Click the 'Assignments' button against the relevant address;
- Click the 'Create' button ;



Admin: Profile Management: Banking Details > Manage Bank Account Assignments >







Create Bank Account

* Indicates required field

* Country 

☒ Account is used for foreign payments
Account definition must include bank and branch information.

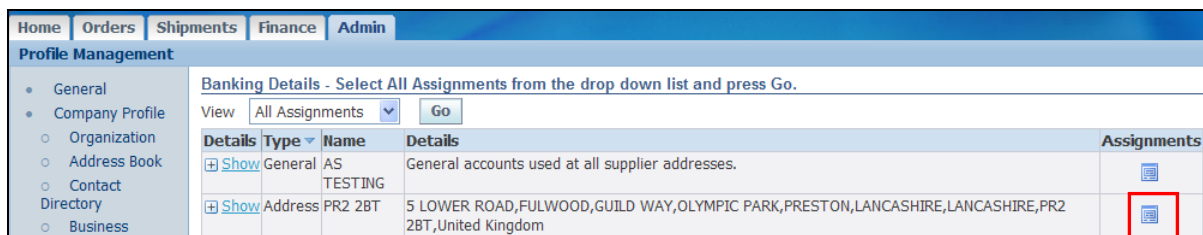
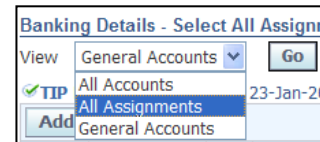
Bank	Branch
<input type="radio"/> New Bank <input checked="" type="radio"/> Existing Bank Bank Name <input type="text" value="NAT WEST BANK PLC"/> 	<input type="radio"/> New Branch <input checked="" type="radio"/> Existing Branch Branch Name <input type="text"/> 

- Click the 'Existing Account' radio button .
- Click in the magnifying glass  next to 'Bank Name';
- Enter the start of the name of the bank and click 'Go' to start the search;
- Click the 'Quick Select'  button next to the relevant bank details;
- Click the 'Existing Branch' radio button .
- Click in the magnifying glass  next to 'Branch Name';
- The search defaults to 'Branch Name' – enter the branch name or use the drop down list to change to 'Sort Code';
- Enter the branch name or the sort code as applicable and click 'Go';
- Click the 'Quick Select'  button next to the relevant branch details;
- Enter the 8 digit bank account number in the 'Account Number' field;
- Enter the account holder name in the 'Account Name' field;
- Enter roll numbers (if applicable) and any other relevant information (e.g. date which the new account is to be used from) into the 'Note to Buyer' field;
- Click the 'Save' button;
- Check the confirmation message is displayed.


Add an Account:

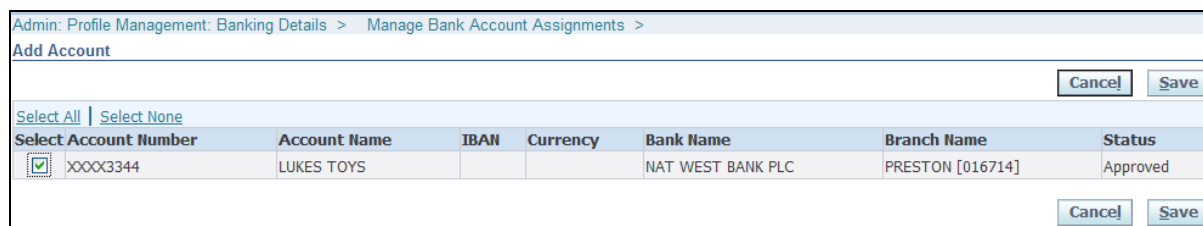
Bank details are associated with the organisation's address. 'Add' allows you to add bank details held for one address to another. This may be used if you have multiple addresses but only one bank account, or if you change your address but the bank details remain the same.

- Select 'All Assignments' from the 'View' drop down list;
- Click the 'Go' button;



Details	Type	Name	Details	Assignments
Show	General	AS	General accounts used at all supplier addresses.	
Show	Address	PR2 2BT	5 LOWER ROAD,FULWOOD,GUILD WAY,OLYMPIC PARK,PRESTON,LANCASHIRE,LANCASHIRE,PR2 2BT,United Kingdom	

- Click the 'Assignments' button against the relevant address;
- Click the 'Add' button  ;
 - Bank details are set up for your organisation, but are not yet associated with this address;



Select Account Number	Account Name	IBAN	Currency	Bank Name	Branch Name	Status
<input checked="" type="checkbox"/> XXXX3344	LUKES TOYS			NAT WEST BANK PLC	PRESTON [016714]	Approved

- Tick to select the bank account to be used;
- Click the 'Save' button;
- Check the confirmation message is displayed.

If you need further assistance please email the following address with your query:

supplierqueries@lancashire.gov.uk.