



Oracle12 iSupplier Portal

External User Guide

Supplier Administration

Last Update: 10/01/2019

Chapter Objectives:

Learn about iSupplier features that can help you manage your profile information like tax payer id, D-U-N-S number etc., Address Book, Contact Directory, business classifications and Surveys.

Chapter Tasks:

View/Update general company information

View/Update new addresses

View/Update your contacts

View/Update business classifications

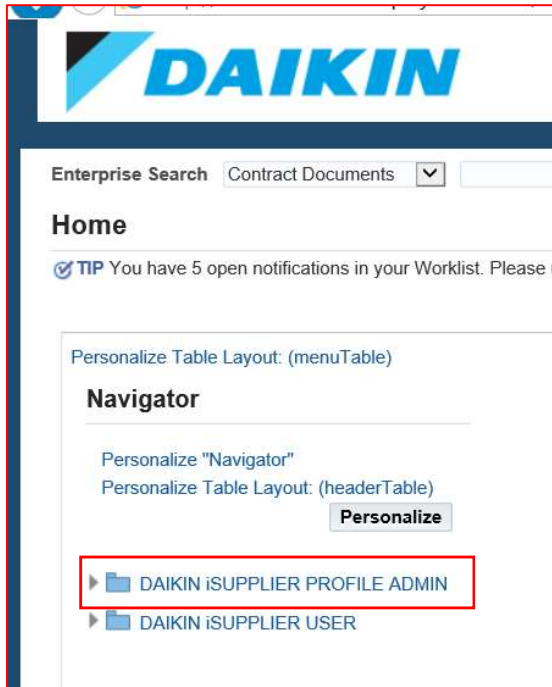
Estimated Lesson Time: 25 minutes

Once a supplier is registered for iSupplier Portal, notification and login credentials for DAA oracle iSupplier Portal will be sent to them

The supplier's primary user will be assigned a user administrator profile – DAIKIN iSUPPLIER PROFILE ADMIN – to allow for management for their company information and to create/maintain supplier users who need access to Daikin iSupplier Portal.

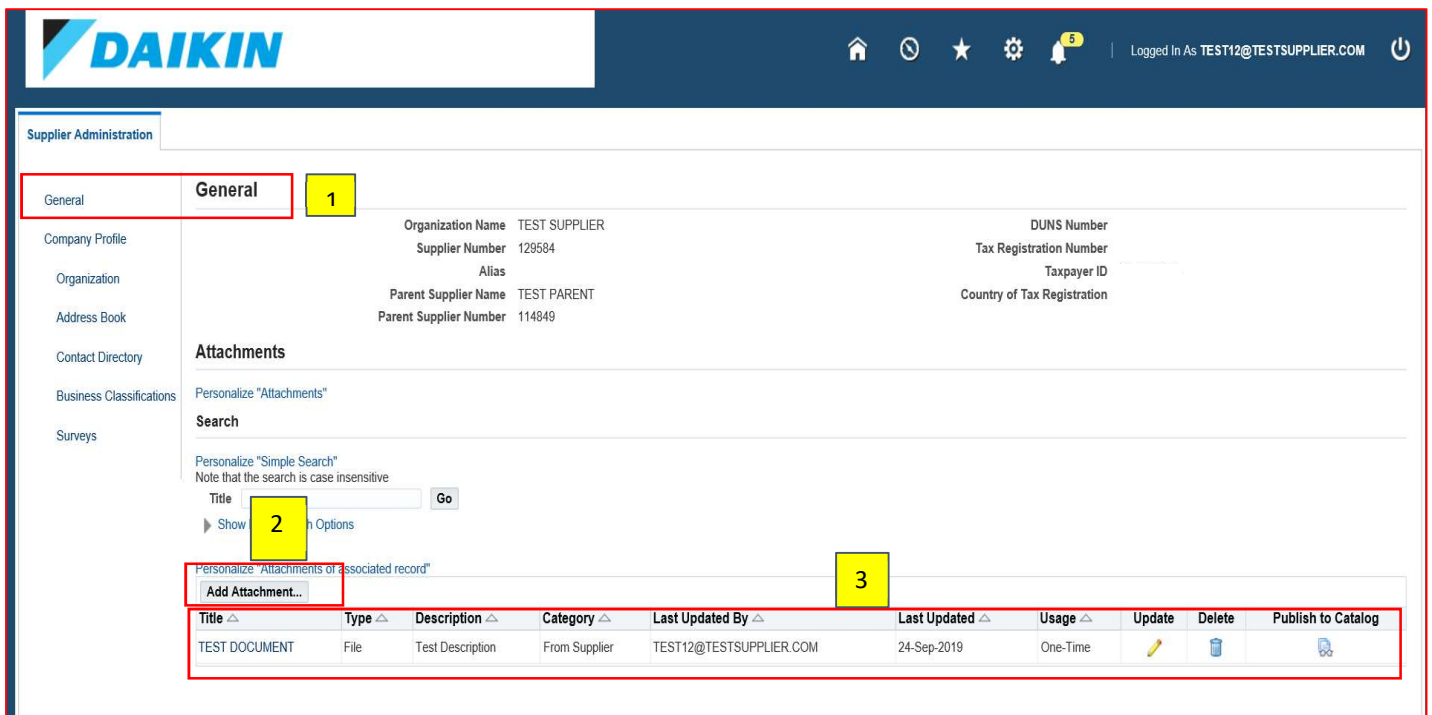
General Tab

Responsibility: Daikin iSupplier Profile Admin



When you login, if you have more than one responsibility assigned to you, you will see iSupplier home page as shown above.

- 1) Click on Daikin iSupplier Profile Admin to open supplier administration page

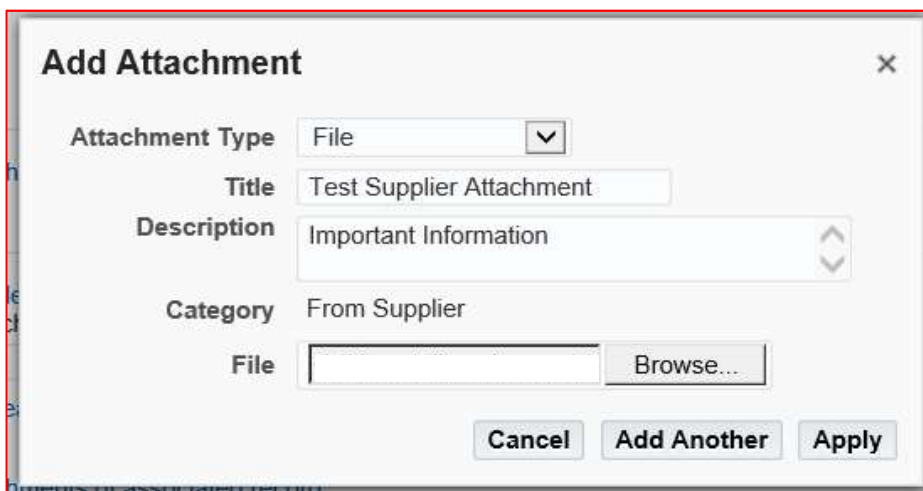


Add/Update Attachments

1) From the *Supplier Administration* menu, select *General*. See 1 above.

To **add** an attachment,

1. In the *Attachments* section, select.
2. Enter the title, description and select the appropriate category from the dropdown list provided.
3. In the *Define Attachment* section,
 - Click **Browse** with the **File** radio button highlighted if attaching a document; locate the file to be uploaded.
 - Click within the URL radio button if the information is available on a website; list the URL in the field provided.
 - Click within the Text radio button if you'll be listing information in the field provided.
 - Click **Apply**; the new attachment will be listed on the *General* page.



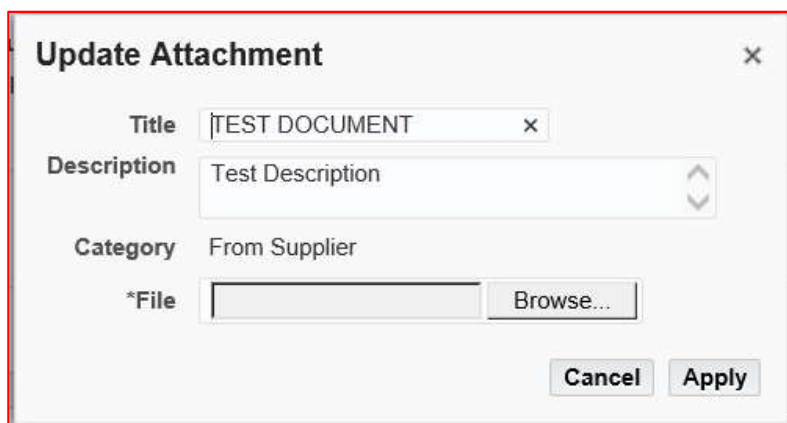
The screenshot shows a dialog box titled "Add Attachment" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Attachment Type:** A dropdown menu with "File" selected.
- Title:** A text input field containing "Test Supplier Attachment".
- Description:** A text area containing "Important Information".
- Category:** A dropdown menu with "From Supplier" selected.
- File:** A text input field with an empty space and a "Browse..." button to its right.

At the bottom of the dialog, there are three buttons: "Cancel", "Add Another", and "Apply".

To **update** an attachment,

- 1) In the *Attachments* section, click alongside the attachment to be updated.
- 2) Modify the title, description and/or category as desired.
- 3) To attach a revised document, click **Browse** then locate the file to be uploaded.
- 4) Click **Apply**; the changes will be applied.



The screenshot shows a dialog box titled "Update Attachment" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Title:** A text input field containing "TEST DOCUMENT" with a close button (X) on the right.
- Description:** A text area containing "Test Description".
- Category:** A dropdown menu with "From Supplier" selected.
- *File:** A text input field with an empty space and a "Browse..." button to its right.

At the bottom of the dialog, there are two buttons: "Cancel" and "Apply".

➤ *You will not be able to delete an attachment.*

Company Information

- 1) Click on **Company Profile** from the *Supplier Administration* menu. The **Organization** section appears.
 - Select the **Company Information** tab. From here you'll have an opportunity to update all fields relative to your company's information such as,
 - General company information including total number of employees
 - Corporate headquarters information
 - Federal Tax ID and Tax Type
 - Annual Gross Revenue for the last 3 years

The screenshot displays the DAIKIN Supplier Administration interface. The top navigation bar includes the DAIKIN logo, a home icon, a clock icon, a star icon, a settings icon, a notification bell with a '5' badge, and a user login status 'Logged In As TEST12@TESTSUPPLIER.COM'. The main content area is titled 'Supplier Administration' and features a left-hand sidebar with navigation options: General, Company Profile, Organization (selected), Address Book, Contact Directory, Business Classifications, and Surveys. The 'Organization' section is active, showing a 'Personalize Default Double Column' header with 'Cancel' and 'Save' buttons. Below this, there are several input fields: 'D-U-N-S Number', 'Legal Structure' (with a search icon), 'Principal Name', 'Year Established', 'Incorporation Year', 'Control Year', 'Mission Statement' (with a scroll bar), 'Chief Executive Name', 'Chief Executive Title', and 'Principal Title'. A 'Personalize "Total Employees"' section follows, containing 'Organization Total', 'Corporate Total', 'Organization Total Type', and 'Corporate Total Type' (all with dropdown menus). The 'Tax and Financial Information' section includes 'Taxpayer ID', 'Tax Registration Num', 'VAT Number', 'Fiscal Year End' (with a dropdown), 'Analysis Year', 'Currency Preference' (with a search icon), 'Annual Revenue', and 'Potential Revenue'. A checkbox for 'Federal Agency' is also present, with a note 'For next fiscal year.' at the bottom right.

Address Book

Click on Address Book to add or modify a purchasing or payment address.

The screenshot shows the DAIKIN Supplier Administration interface. The top navigation bar includes the DAIKIN logo, a home icon, a clock icon, a star icon, a settings icon, a notification bell with a '5' badge, and a user profile section showing 'Logged In As TEST12@TESTSUPPLIER.COM'. The left sidebar contains a menu with 'Supplier Administration' selected, and sub-items: 'General', 'Company Profile', 'Organization', 'Address Book', 'Contact Directory', 'Business Classifications', and 'Surveys'. The main content area is titled 'Address Book' and includes a 'Personalize Table Layout: (TableLayout)' and 'Personalize "Address"' option. Below this is a toolbar with a 'Create' button, a refresh icon, a settings icon, and a list icon. The main table has the following structure:

Address Name ▲	Address Details	Country ▲	Update	Remove
		United States		
		Mexico		
		United States		
		Canada		

To add a new purchasing or payment address, click on the create button.

This close-up screenshot shows the 'Supplier Administration' sidebar with 'Address Book' selected. The main content area is titled 'Address Book' and features a 'Create' button highlighted with a red box. Below the button is a form field labeled 'Address Name ▲'.

Complete the following fields:

- Address Name (*First Five Characters of the City Name*)
- Country
- Address Line1
- City/Town/Locality
- County
- State/Region
- Province (*for international addresses only*)
- Postal Code
- Phone Area Code (*for main number to this site*)
- Phone Number (*main number to this site*)

Then check the box next to the appropriate type of address. You can choose both if this is where the purchase orders are to be sent and for payments to be made. Click on the Save button when you're done.

DO NOT CHECK RFQ ADDRESS.

DAIKIN | Home | Clock | Star | Gear | 5 | Logged In As TEST12@TESTSUPPLIER.COM | Power

Supplier Administration: Address Book >

Create Address

Cancel Save

* Indicates required field

Supplier Name: TEST SUPPLIER

Supplier Number: []

Phone Area Code: 111
 Phone Number: 222-3333
 Fax Area Code: []
 Fax Number: []
 Email Address: 123@abc.com

* Address Name: PITTS
 Country: United States
 * Address Line 1: 123 Main St
 Address Line 2: Suite # 200
 Address Line 3: []
 Address Line 4: []
 * City/Town/Locality: Pittsburgh
 County: Allegheny
 State/Region: PA
 Province: []
 * Postal Code: 15106

Purchasing Address
 Payment Address
 RFQ Only Address

Note

Note: New Office & Plant Location

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.

To modify an existing site, click on the pencil icon next to the appropriate address.



DAIKIN | Home | Clock | Star | Gear | 5 | Logged In As TEST12@TESTSUPPLIER.COM | ? | Power

Supplier Administration

- General
- Company Profile
- Organization
- Address Book**
- Contact Directory
- Business Classifications
- Surveys

Address Book

Create | Refresh | Settings | Filter

Address Name ▲	Address Details	Country ▲	Update	Remove
PITTS	123 Main St Suite # 200 Pittsburgh, PA 15106	United States		

Update the appropriate fields and click the Save button. In below example, address line 2 and phone number are updated. Use note to capture comments.

Supplier Administration: Address Book >

Update Address Cancel Save

* Indicates required field

Personalize Stack Layout: (AddrDIRN)

Supplier Name TEST SUPPLIER Supplier Number 129584

Personalize Flow Layout: (SeparatorRN)


* Address Name	PITTS	Phone Area Code	111
Country	United States	Phone Number	222-4444
* Address Line 1	123 Main St	Fax Area Code	
Address Line 2	Suite # 700	Fax Number	
Address Line 3		Email Address	123@abc.com
Address Line 4			
* City/Town/Locality	Pittsburgh	<input checked="" type="checkbox"/> Purchasing Address	
County	Allegheny	<input checked="" type="checkbox"/> Payment Address	
State/Region	PA	<input type="checkbox"/> RFQ Only Address	
Province			
* Postal Code	15106		

Personalize Table Layout: (region5)
Personalize "Note"

Note

Note	Update new address
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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.

 **Confirmation**

Details for your PITTS address have been modified.

Contact Directory

Click on Contact Directory to create, modify or remove contacts. 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.

Supplier Administration

Contact Directory : Active Contacts

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Addresses	Update
TEST	SUPPLIER	TEST SUPPLIER	786-786973709-233	test_supplier@gmail.com	Current	✓		
TEST	CANADA	TEST SUPPLIER		TSTCAN@Test.com	Current	✓		
TST	MEXICO	TEST SUPPLIER		TSTMEX@test.com	Current	✓		
TEST	CONTACT	TEST SUPPLIER	999-999-9990	TESTC@test.com	Current	✓		
TEST1	SUPPLIER	TEST SUPPLIER		TEST1@test.com	Current	✓		
TEST 11	SUPPLIER	TEST SUPPLIER		Test11@Testsupplier.com	Current	✓		
Test12	Supplier	TEST SUPPLIER		TEST12@TestSupplier.com	Current	✓		
TEST	CONTACT	TEST SUPPLIER		TEST001@Test.com	Current	✓		
TEST	CONTACT	TEST SUPPLIER	999-999-9991	TEST002@Test.com	Current	✓		
TEST	CONTACT	TEST SUPPLIER		TEST003@test.com	Current	✓		
TEST004	CONTACT	TEST SUPPLIER		TEST004@daikinapplied.com	Current	✓		

Click on the Create button to enter additional contacts for your company

Complete the following fields:

- First Name
- Last Name
- Job Title
- Department
- Contact Email
- Phone Area Code
- Phone Number
- Alternate Phone Area Code (for Mobile number)
- Alternate Phone Number (for Mobile number)

Supplier Administration: Contact Directory >

Add Contact Cancel | Apply

* Indicates required field

<p>Contact Title Mr. <input type="text"/></p> <p>First Name Supplier <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>* Last Name User <input type="text"/></p> <p>Alternate Name <input type="text"/></p> <p>Job Title Order Receiver <input type="text"/></p> <p>Department Customer Service <input type="text"/></p> <p>Email Address 123@abc.com <input type="text"/></p> <p>URI abc.com <input type="text"/></p>	<p>Phone Area Code 111 <input type="text"/></p> <p>Phone Number 222-3333 <input type="text"/></p> <p>Phone Extension 99 <input type="text"/></p> <p>Alternate Phone Area Code 111 <input type="text"/></p> <p>Alternate Phone Number 123 4567 <input type="text"/></p> <p>Fax Area Code <input type="text"/></p> <p>Fax Number <input type="text"/></p> <p>Inactive Date (18-Sep-2019 19:45:00) <input type="text"/></p>
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User Account

The Contact Directory allows you to maintain the contacts for your company that are authorized to access the DAA systems and that DAA 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 DAA's Oracle system.

User Account Information

Username 123@ABC.COM **1** Inactive Date (18-Sep-2019) Reset Password

User Notifications

Certification Reminders **2**

Responsibilities

Responsibility	Application
<input checked="" type="checkbox"/> DAIKIN ISUPPLIER USER	iSupplier Portal
<input type="checkbox"/> DAIKIN ISUPPLIER PROFILE ADMIN	iSupplier Portal

3

If you would like to provide this user with access to the DAA's iSupplier Portal, select the Create User Account for this Contact check box.

- Select your Supplier Name (only one in list)
- The user name will be the email address from above. Please leave as such. *Make sure you use ONLY the corporate email address.*
- If this contact should be receiving certification reminders select that choice. See 2 above.
- You will be able to select the type of access the new contact has when they access DAA systems. See 3 above
- 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).
- Click Apply when finished.
- The new user will be sent an email with a user name and password.

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers
TEST SUPPLIER

Site Restriction

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

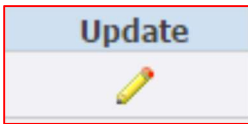
Contact Restriction

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

Cancel Apply

Update Contact

To update an existing contact click the pencil icon



Supplier Administration: Contact Directory >

Update Contact Cancel Apply

* Indicates required field

Contact Title	Mr. <input type="text"/>	Phone Area Code	<input type="text" value="111"/>
First Name	<input type="text" value="Supplier"/>	Phone Number	<input type="text" value="222-3333"/>
Middle Name	<input type="text"/>	Phone Extension	<input type="text" value="99"/>
* Last Name	<input type="text" value="User"/>	Alternate Phone Area Code	<input type="text" value="111"/>
Alternate Name	<input type="text"/>	Alternate Phone Number	<input type="text" value="123 4567"/>
Job Title	<input type="text" value="Order Receiver"/>	Fax Area Code	<input type="text"/>
Department	<input type="text" value="Customer Service"/>	Fax Number	<input type="text"/>
Email Address	<input type="text" value="123@abc.com"/>	Inactive Date	<input type="text" value="(18-Sep-2019 19:45:00)"/>
Url	<input type="text" value="http://abc.com"/>		

User Account Information

Username Inactive Date Reset Password

User Notifications

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

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 DAA.

The screenshot shows the DAIKIN Supplier Administration web application. The top navigation bar includes the DAIKIN logo, a home icon, a clock icon, a star icon, a settings icon, a notification bell with a '5' badge, and a user profile section showing 'Logged In As TEST12@TESTSUPPLIER.COM'. The left sidebar contains a menu with 'Supplier Administration' selected, and sub-items: 'General', 'Company Profile', 'Organization', 'Address Book', 'Contact Directory', 'Business Classifications' (highlighted with a red box), and 'Surveys'. The main content area is titled 'Business Classifications' and includes a 'Cancel' and 'Save' button. Below this is a 'Certification' section with a checkbox for certifying the information and a 'Last Certified' field. A table below lists various business classifications with columns for 'Applicable', 'Minority Type', 'Certificate Number', 'Certifying Agency', and 'Expiration Date'. The table contains 8 rows of data.

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
05 Alaskan Native Corporation Owned Firm	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
12 Local Government	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
1A Minority Institutions	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
1B Tribally Owned Firm	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
1D Small Agricultural Cooperative	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
20 Foreign Owned and Located	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
27 Small Disadvantaged Business	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
2F State Government	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>