OVERVIEW

This User Guide aims to describe how iSupplier Users can create invoices.

HOW TO USE THIS USER GUIDE

If familiar with the iSupplier Portal Functionalities and the CRC process, refer to the One-page Quick Reference (Cheat sheet) on page 2. Otherwise, review the Process Overview section to better understand the processes. Next, review the Content/Checklist section, as this section lists the required and optional steps for each of the processes. Last, complete the required steps according to the detailed written instructions which follow the numbering sequence shown in the screenshots for how each of the tasks shall be executed.

When completing the steps in the iSupplier Portal, refer to the Content/Checklist column to validate the required steps have been completed. In addition, this User Guide provides high-lighted and / or framed notes, tips and important messages to assist in some tasks when creating an invoice.

PROCESS OVERVIEW

Suppliers can submit an invoice online against Purchase Orders that are not fully billed. First, the Supplier must look for the Purchase Order and identify those items to be invoiced. The next step is to prepare the Invoice, attach any support or documentation required by CRC and update the quantity of the items to be invoiced. Suppliers can also add charges for freight and taxes. Freight charges can only be entered if the Standard Purchase Order allows for it. Finally, Suppliers must submit the Invoice in compliance with all the requirements and/or attachments required by CRC.

CRC will review the Invoice and can request clarifications, if needed. The Supplier will receive an automatic email notification requesting to access the iSupplier Portal and respond to the request. Reminders are sent until the action is completed.

**IMPORTANT:** Suppliers will not be able to change an invoice after it has been submitted.
QUICK REFERENCE (CHECK SHEET)

1. Login to the iSupplier Portal
   - In the “Main Menu” panel click on the “Supplier User – Finance View” responsibility.
   - From the “Home” page, click on the “Finance” tab.

2. Search for Purchase Orders
   - On the “Finance” tab, click on the “Create Invoices” hyperlink. Then, click on the “Go” button at the top-right corner of the screen.
   - In the “Purchase Order Number” field, enter the PO number. Then, click on the “Go” button.
   - In the “Select” column, select the applicable items to be invoiced by clicking on the respective checkbox.
   - Click on the “Next” button, the “Create Invoice: Details” screen will appear.

3. Complete the Invoice Details
   - In the “Remit To” field, enter the remittance address.
     - Click on the “Magnifying Glass” icon, a “Search and Select” window will appear. Then click on the “Go” button for listing of remit addresses. Click on the respective “Quick Select” icon for the address where invoice payment should be remitted.
   - In the “Invoice Number” field, enter the invoice number.
     - Only numerical and alpha characters are allowed in this field. Do not enter any special characters.
   - In the “Invoice Date” field, click on the “Calendar” icon to select the effective invoice date.
     - Do not select a future date.
   - In the “Invoice Description” field, provide/summarize the invoice content as clearly as possible.
     - If the payment has to be remitted to different Supplier name (i.e.: Subsidiaries/Third Party), the name must be entered in the “Bill to Vendor Site” field.
   - IMPORTANT: In these special cases, a relationship between the Supplier and the Subsidiaries/Third Party must be established with Oxy prior to processing the Invoices against the Purchasing Document
     - Click on the “Magnifying Glass” icon, and then a “Search and Select” window will appear.
     - Click on the “Go” button for listing the Subsidiaries/Third Party names which are associated with the Supplier. Then, click on the respective “Quick Select” for the Supplier name that will receive the payment.
     - The chosen Supplier name will be automatically entered in the “Bill to Vendor Site” field.
     - Attach any appropriate support documentation to the Invoice by clicking on the “Add Attachment” button.
     - IMPORTANT: An Attachment must be attached to the invoice.

4. Review and Submit the Invoice
   - Review the information on the “Create Invoice: Manage Tax” screen and ensure that it is accurate. If changes are needed click on the “Back” button.
   - Alternatively, click on the “Cancel” button to discard the invoice.
   - Click on the “Submit” button. A confirmation message will be displayed indicating that the Invoice has been submitted.

5. Receive additional Notification
   - IMPORTANT: A notification can require that Suppliers provide clarifications or additional information about the Invoice. The Supplier will receive a notification by both email and in the iSupplier Portal
     - Do NOT click on the “Answer Question” button in the email notifications. To answer a notification login to the “iSupplier Portal”.
     - To respond a Notification, access the iSupplier portal. In the “Worklist” section, find the list of pending notifications. Then, click on the “Notification Subject” hyperlink.
     - Scroll down to the “Response” section, it shows the additional information requested by Oxy.
     - In the “Answer” field, provide the required information. Then click on the “Submit” button. A confirmation message will be shown indicating that the response has been submitted.
## CONTENT / CHECKLIST

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<th>Check</th>
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<td>Optional</td>
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</table>
INSTRUCTIONS

1. ACCESS THE ISUPPLIER PORTAL

Login to the iSupplier Portal at: http://CRCsupplier.CRC.com/OA_HTML/AppsLocalLogin.jsp

(1) Enter Username and Password and click on the “Login” button.

Note: The “Password” field is case sensitive. If there is a problem accessing to the iSupplier Portal, click at the “Login Assistance” hyperlink. Alternatively, view the User Guide—Overview Access and Passwords, Navigation, Notification.

After logging in to the portal, the “Oracle Application Home Page” will be displayed if more than one responsibility is assigned to the user. If the user only has one responsibility the “Home” tab screen for that responsibility will automatically be displayed.

(2) To access and view the invoice, click on the “Supplier User – Invoicing” responsibility to view and create an invoice.

Once in the required responsibility, the “Home” tab screen for that responsibility will then be displayed. Click on the “Finance” tab to see and create Invoices.
2. CREATE AN INVOICE

2.1. SEARCH FOR PURCHASE ORDERS

On the “Finance” tab, create and submit an Invoice against Standard Purchase Orders that are not fully billed.

(1) Click on the “Create Invoices” hyperlink below the “Finance” tab.
(2) Click on the “Go” button, then the “Create Invoice: Purchase Orders” screen will appear.

(3) In the “Search” section, enter the PO number in the “Purchase Order Number” field.
   **Note:** To narrow the search, type the first two digits of the Purchase Order Number followed by the “%” symbol and then type the last four digits of the Purchase Order Number (i.e.: 21%1234, 36%7020, etc.)
   **Note:** Alternatively, populate any of the “Purchase Order Date”, “Buyer” and “Organization” fields.
(4) Click on the “Go” button. The applicable Purchase Orders lines will be displayed.
   **Note:** If the entered data is correct and the required Purchase Order is not displayed on the screen, verify the Purchase Orders status on the “Orders” tab to know if it is available for invoicing. To learn how to search for the Purchase Order statuses go to Exhibit 2 – Verify if a Purchase Order is Available for Invoicing.
(5) In the “Select” column, select the applicable items to be invoiced by clicking on the respective checkbox. More than one line can be selected at one time; however the currency and organization of all the items must be the same.
(6) Click on the “Next” button, the “Create Invoice: Details” screen will be displayed.
2.2. COMPLETE THE INVOICE DETAILS

Once the Items of a Standard Purchase Order has been selected, the next step is to prepare the Invoice in the “Create Invoice: Details” screen. This screen shows the following sections.

1. The “Header” section is composed of the “Supplier”, “Invoice” and “Customer” sections. On these sections add the general information about the Invoice, such as the remittance address, invoice number, invoice date, invoice type, a brief description and the attachments.

2. The “Items” section shows the items to be invoiced and allows for quantities to be added to the items.

3. The “Shipping and Handling” section allows additional charges for freight and taxes to be added to the invoice.
2.2.1. COMPLETE THE INVOICE HEADER

It is critical to complete all the required fields among the “Supplier”, “Invoice” and “Customer” sections before proceeding to complete the other Invoice sections. Otherwise the portal will not allow for quantities to be added to the Items and charges.

**Note:** Asterisks indicate a field is required.

1. In the “Remit To” field enter the remittance address by clicking on the “Magnifying Glass” icon; a “Search and Select” window will appear. Then click on the “Go” button for listing of remit addresses and click on the respective “Quick Select” icon for the address where is required to receive the payment.

**Note:** If the remittance name is different from the Purchasing Document name see Step 5. However, this field must be populated with the address associated with the Purchasing Document.

2. Populate the “Invoice Number” field.

**Note:** Do not enter any special character in this field (i.e. ‘/’, ‘#’, ’-‘), otherwise an error message will be shown at the top of the screen and the invoice cannot be submitted.

3. In the “Invoice Date” field, click on the “Calendar” icon to select the effective invoice date.

**Note:** Do not select a future date.

4. In the “Invoice Description” field, provide/summarize the Invoice content as clearly as possible.

5. If the payment has to be remitted to a different Supplier name (i.e.: Subsidiaries/Third Party), the name must be entered in the “Bill to Vendor Site” field. Click on the “Magnifying Glass” icon to search for and select the correct Supplier name. Go to the Exhibit 1 – Search for Bill to Vendor Site (Supplier Relationship) to learn how to populate the appropriate Supplier name.

**IMPORTANT:** In these special cases, a relationship between the Supplier and the Subsidiaries/Third Party must be established with CRC prior to processing the Invoices against the Purchasing Document. CRC refers to this as a Supplier Relationship.

6. Click on the “Add Attachment” button to attach any support documents required by CRC. The following screen will appear.

**IMPORTANT:** Use this section to attach all required documents (Excel documentation, Word documentation, etc.) and any support documents.
(7) In the “Title” field, enter the file name.
(8) In the “Description” field, describe/summarize the file content as clearly as possible.
(9) In the “Define Attachment” section select the appropriate attachment type.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>Attach a file by selecting the “File” radio button, then click on the “Browse..” button and search for the file in your computer.</td>
</tr>
<tr>
<td>URL</td>
<td>Attach a URL by selecting the “URL” radio button, enter (or paste) the applicable URL address (it must not be an internal webpage of the Supplier. CRC must be able to access it).</td>
</tr>
</tbody>
</table>

**Note:** Do not select the Text radio button.

**Note:** As needed, click on “Add Another” button to continue attaching documentation by repeating the steps above. Every time an attachment is added a confirmation message will be displayed.

(10) Click on the “Apply” button to add the attachments. A confirmation message as shown below is displayed on the “Create Invoice: Details” screen to indicate that the attachment has been added.

(11) As needed, remove or update the attachments by moving the cursor on the “Attachment List” hyperlink, then the “Attachments” list as shown in the example above will appear on the screen.

**Note:** Alternatively, click on the “Attachment List” hyperlink; this will prompt another screen that will display the “Attachments” list.

(12) As needed, update the attachment by clicking on the “Pencil” icon on the “Update” column.

(13) As needed, to delete the attachment, click on the “Trash can” icon on the “Delete” column.

**Note:** Repeat steps 6 through 10 to attach additional files.
2.2.2. COMPLETE THE ITEMS SECTION AND ADD CHARGES

Once the “Supplier”, “Invoice” and “Customer” sections have been completed, proceed to provide the quantities for each item and add any additional charges.

(1) In the “Quantity” field, enter for each line only the quantity being invoiced.

**IMPORTANT:** It is possible to enter a quantity which is less but not greater than the Available Quantity.

(2) Add any additional charges by clicking on the “Add Row” button in the “Shipping and Handling” section.

Optional: Add Charges

**IMPORTANT:** If required to add additional charges follow the steps below. Otherwise, skip these steps and go to Step 7.

(3) In the “Charge Type” dropdown menu, select one of the following options.

<table>
<thead>
<tr>
<th>Charge Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freight</td>
<td>Select this option only if the Standard Purchase Orders to be invoiced allows charging for freight. If freight is not allowed an “Error” message will appear and the freight line must be deleted before the invoice can be submitted.</td>
</tr>
<tr>
<td>Tax</td>
<td>Select this option to charge for Taxes</td>
</tr>
</tbody>
</table>

(4) In the “Amount” field, enter the amount for the respective charge.

(5) In the “Description” field, provide a brief description of the charge.

**Note:** Repeat steps 2 through 5 to add additional charges.

(6) As needed, remove charges by clicking on the “Trash can” icon on the “Delete” column.

(7) Click on the “Next” button.

**Note:** Alternatively, click on the “Back” button to return to the previous page.
2.3. REVIEW AND SUBMIT THE INVOICE

After completing all of the Invoice sections, the next step is to review the Invoice and ensure all the information is accurate.

**IMPORTANT:** An Invoice cannot be modified after it has been submitted. However, the submitted Invoice can be viewed in the Finance Tab. For further instructions on how to view an Invoice, see the User Guide – View Invoices and Payments. For any Invoice questions please contact the Account Payable department at 1-855-272-4732 or through the CRC webpage.

( 1 ) As needed, click on the “Back” button to make changes.
   **Note:** As needed, click on the “Cancel” button to discard the invoice.

( 2 ) Click on the “Submit” button. A confirmation message as shown below will appear on the screen to indicate that the Invoice has been submitted.
   **Note:** The confirmation number for the Invoice is the invoice number that was previously provided.
(3) A copy of the Invoice can be printed by clicking on the “Printable Page” button. 

**Note:** A “Pop-Up” screen will be displayed. Either click on the “Open” button to view the PDF file and print it using the Acrobat Reader or click on the “Save” button to save the PDF file in the computer.

(4) Return to the “Invoice Actions” screen by clicking on the “Return to Invoices” hyperlink at the bottom of the screen.
3. RECEIVE AND ADDRESS INVOICE ADDITIONAL EVENT NOTIFICATIONS

CRC will review the Invoice that has been submitted by the Supplier. If any additional information is needed then CRC AP personnel will send a notification to the Supplier Contact. The Supplier will receive a notification by both email and in the iSupplier Portal.

**Note:** For further information regarding Notifications, please review the [User Guide – Overview Access and Passwords, Navigations and Notifications](#).

**Option 1:** Review email Notification.

- The email notification is for information purposes and can be used to access the iSupplier Portal. The email notification shows the following information.

**IMPORTANT:** For automatic notifications the email sender will be “CRC – Notification” not a specific CRC Person. If you do not receive a notification in your mailbox, please check your mailbox spam, trash or delete folders, or see if it might have been filtered by your company spam filtering services. Make sure to set “CRC – Notification” as a valid email sender to avoid any issue for subsequent notifications. Yahoo and Hotmail email account users might NOT receive some notifications correctly. If an email notification is showing an error message, login into the iSupplier Portal – Worklist Section to review the notification there.
Option 2: Review and respond to a Notification from the iSupplier Portal “Worklist” section.

- Logging in to the portal, the “Oracle Application Home Page” will be displayed if more than one responsibility is assigned to the user. If the User only has one responsibility the “Home” tab screen for that responsibility will automatically be displayed.

  ![Oracle Application Home Page](image)

  **Note:** In the example above more than one responsibility is assigned to the User. This means that the User can access the notification through the “Worklist” section in the “Oracle Application Home” page.

  (1) In the “Worklist” section, click on the “Notification Subject” hyperlink under the “Subject” column. The Notification screen will appear.

  **Note:** Users with one responsibility can access the notification in the “Notifications” section in the “Home” tab, then click on the “Notification Subject” hyperlink and continue to the next step.
(2) The “Response” section shows the required information that CRC has requested for the Invoice. Enter the response in the “Answer” field. Then, click on “Submit” button. A confirmation message will be shown indicating that the response has been submitted.

Note: To go directly to this form, click on the hyperlink in the email notification.
EXHIBIT 1 - SEARCH FOR BILL TO VENDOR SITE (SUPPLIER RELATIONSHIP)

This step is only necessary if the payment has to be sent to a Subsidiary/Third Party. In the “Create Invoice: Details” screen, the Supplier must enter the actual Supplier name in the “Bill to Vendor Site” field by following the steps outlined below.

1. In the “Bill to Vendor Site” click on the “Magnifying Glass” icon to search for and select the name. A “Search and Select” window will appear.

2. Click on the “Go” button for listing the Subsidiaries/Third Party names which are associated with the Supplier.

3. Click on the respective “Quick Select” icon to select the name, then it will be automatically entered in the “Bill to Vendor Site” field on the “Create Invoice: Details” screen.
EXHIBIT 2 – VERIFY IF A PURCHASE ORDER IS AVAILABLE FOR INVOICING

This step is only necessary if the required Purchase Order to invoice does not appear in the “Create Invoice: Purchase Orders” screen. To verify the status for invoicing, click the “Orders” tab to search for the Purchase Order.

1. On the “Orders” tab, click on the “Advance Search” button. Alternative, is to look for the required Purchase Order in the list displayed on the screen.

2. In the “Advance Search” section, enter the Purchase Order number in the “PO Number” field.

3. Click on the “Go” button. The applicable Purchase Order will be displayed.

4. The “Status” column shows the following Purchase Order statuses:

<table>
<thead>
<tr>
<th>Purchase Order Statuses</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>The purchase order is valid and available for invoicing.</td>
</tr>
<tr>
<td>Requires Acknowledgment</td>
<td>The Supplier must acknowledge the Purchasing Document. The purchase order is valid and available for invoicing.</td>
</tr>
<tr>
<td>Accepted</td>
<td>The purchase order is valid and open for receipt and it has been acknowledged and accepted by the Supplier. It is available for invoicing.</td>
</tr>
<tr>
<td>Frozen</td>
<td>The purchase order is on Hold for some reason and is not available for invoicing.</td>
</tr>
<tr>
<td>Closed</td>
<td>The purchase order is completed and is no longer available for invoicing.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The purchase order has been canceled and is no longer needed; also it is not available for invoicing.</td>
</tr>
<tr>
<td>Buyer Change Pending</td>
<td>The purchase order is being revised by CRC. It is not available for invoicing. After the revisions are complete, the new revised Purchasing Document will be sent out.</td>
</tr>
</tbody>
</table>