

User Guide – Overview to Access, Passwords, Navigation and Notifications

Version 1.0 December 1, 2014

#### **OVERVIEW**

This User Guide is an overview to understand how to access the iSupplier Portal, navigate through the system and understand the notification sent from the automatic system email notification to the company's iSupplier users.

#### HOW TO USE THIS USER GUIDE

If familiar with the iSupplier Portal Functionalities and the CRC process, refer to the Three-Page Quick Reference (Cheat sheet) on page 2 – 4. 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, you may refer to the Content/Checklist column to validate that the required steps have been completed. In addition, this User Guide provides high-lighted and / or framed notes, tips and important messages to assist you in some tasks.

#### PROCESS OVERVIEW

This User Guide describes how iSupplier users can access the iSupplier Portal, change passwords as needed, and understand the different responsibilities available in the portal. Also, describes the information available in the portal to understand the iSupplier Portal navigation and the notifications sent from the system to Suppliers.



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# QUICK REFERENCE (CHEAT SHEET)

This Quick Reference describes how to access key iSupplier Portal functionality.

Action	Tab /Screen	Quick Reference
Reset Password	Login Screen	<ul> <li>Click on the "Login Assistance" hyperlink.</li> <li>In the "User Name" field, enter your User Name to access the iSupplier Portal.</li> <li>Click on the "Forgot Password" button to reset your Password. This will prompt an email with instructions to be sent automatically to the email address associated with the Username (this may take up to an hour).</li> <li>In the email, click on the "iSupplier Portal" hyperlink you will be taken automatically to the "Change Password" screen.</li> </ul>
Get User Name	Login Screen	<ul> <li>Click on the "Login Assistance" hyperlink.</li> <li>In the "Email" field, enter the email address associated with your account (the email used in registration).</li> <li>Click on the "Forgot User Name" button. Your User Name will be emailed to you.</li> </ul>
Change Password	General Preferences	<ul> <li>Click on the "Preferences" hyperlink in the top right corner of the screen. This will take you to the "General Preferences" screen.</li> <li>Change your password at any time in the "Change password" section.</li> </ul>
Notifications Settings	General Preferences	<ul> <li>IMPORTANT: This setting does not affect whether notifications are generated or displayed in the iSupplier Portal.</li> <li>Click on the "Preferences" hyperlink in the top right corner of the screen. This will take you to the "General Preferences" screen.</li> <li>In the "Notifications" section, select how you want to receive your e-mail notifications from the "Email Style" dropdown menu.</li> </ul>
Access to a Specific Responsibility	Home	<ul> <li>IMPORTANT: The "Oracle Application Home Page" screen will be displayed only if more than one responsibility has been assigned to the user. Otherwise, the iSupplier "Home" tab will be shown immediately.</li> <li>There are five different responsibilities used in navigating in the iSupplier Portal:</li> <li>Supplier Security Administrator: This responsibility allows the User to access the "Admin" tab.</li> <li>Supplier User – Registration: This is a temporary responsibility to complete the Supplier registration and qualification process.</li> <li>Supplier User - Full View: This responsibility allows the User to access all available tabs within the portal.</li> <li>Supplier User - Transactions: This responsibility allows the User to access all available tabs within the portal.</li> <li>Supplier User - Finance View: This responsibility allows the User to access all available tabs within the portal.</li> <li>Supplier User - Transactions: This responsibility allows the User to access all available tabs within the portal.</li> <li>Supplier User - Transactions: This responsibility allows the User to access all available tabs within the portal.</li> <li>Supplier User - Finance View: This responsibility allows the User to view invoices and payment information.</li> <li>Supplier User - Invoicing: This responsibility allows the User to create/view invoices and credit memos, and also view payment information.</li> <li>Click on the applicable responsibility hyperlink.</li> </ul>
Notifications	Home	<ul> <li>IMPORTANT: iSupplier users simultaneously receive notifications by email and in the iSupplier Portal. To respond to a Notification sent by email, click on the "Negotiation Details" hyperlink. This will bring you to the iSupplier Portal "Login" screen.</li> <li>In the "Worklist" section, find the list of your pending notifications.</li> <li>To display all your notification, click on the "Full List" button.</li> <li>To see the details of a notification, click on the "Notification Subject" hyperlink.</li> <li>Notifications do not provide all the data or functionality to fully satisfy the requirement. To execute the action, go to the specific screen.</li> <li>Do not click on the "Actions" button on the notifications.</li> </ul>
Notification Delegation - Grant Work List	Home	<ul> <li>In the "Notifications" section, click on the "Full List" button to share all or just specific notifications with someone else.</li> <li>Click on the "Worklist Access" hyperlink at the bottom of the screen, and then click on the</li> </ul>



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Action	Tab /Screen	Quick Reference
Access		"Grant Worklist Access" button.
		<ul> <li>Populate the required fields.</li> </ul>
		<ul> <li>In the "Grant Access to" section, select from the following:</li> </ul>
		<ul> <li>"All Item Types" radio button: To share all your notifications with someone else.</li> </ul>
		<ul> <li>"Selected Item Types" radio button: To specify which notification will be shared.</li> </ul>
		<ul> <li>If you have not granted access to All Item Types, to specify which types of notifications</li> </ul>
		will be shared, in the "Available Item Types" box, select the notification types to share
		by clicking on the appropriate types.
		Click on the "Move Arrow" icon to transfer the item to the "Selected Item Types" box.
		Click on the "Apply" button.
		• In the "Notification" section, click on the "Full List" button to auto respond or redirect
		notifications within your organization during times when you will not be available to
		respond to notifications
		• Click on the "Vacation Rules" hyperlink at the bottom of the screen, and then click on the "Create Rule" button
Notification		"Create Rule" button.
Delegation –	Home	<ul> <li>Click in the "Item Type" dropdown menu and select the type of notification that will be rerouted. And then click the "Next" button.</li> </ul>
Vacation Rules		<ul> <li>In the "Notification" option, select:</li> </ul>
		<ul> <li>"All": To delegate/transfer all notifications related to the selected notification type.</li> </ul>
		<ul> <li>"Select": To delegate/transfer selected notifications.</li> </ul>
		<ul> <li>Click on the "Next" button.</li> </ul>
		• Populate all the required fields. Then click on the <b>"Apply"</b> button.
		• Choose the type of search from the dropdown menu (i.e.: Purchase orders, Shipments,
		Invoices, and Payments).
Search Option	Home	• In the empty box, enter the document number or "%" symbol (this will broaden the
•		searching results in any searching criteria).
		• Click on the <b>"Go"</b> button to begin the search.
View Product	Product	Click on the "Supplier Items" hyperlink.
Information	FIOUUCI	<ul> <li>Populate search criteria in the "Simple Search" section and click on the "Go" button.</li> </ul>
		<ul> <li>Click on the "Consigned Inventory" hyperlink.</li> </ul>
View Consigned		<ul> <li>Populate search criteria in the "Simple Search" section and click on the "Go" button.</li> </ul>
Inventory	Product	• To view the number of days an item has aged through CRC's transactions related to your
,		company's consigned products, click on the "Consigned Inventory Aging" hyperlink.
		• Select the number of days the item has aged from the "View" dropdown menu, and
		then click on the <b>"Go"</b> button to display the information.
View and Update	Admin	<ul> <li>To view specific attachment content click on the attachment "Title" hyperlink in the "Attachments" section.</li> </ul>
Attachments	Aumin	<ul> <li>To update an attachment, click the "Update" pencil icon in the "Update" column.</li> </ul>
		Click on the "Add Attachment" button.
		<ul> <li>Enter the attachment name in the "Title" field, and provide a brief description of the</li> </ul>
Add		attachment in the <b>"Description"</b> field.
Attachments	Admin	Select the option "From Supplier" from the "Category" dropdown menu.
		• Select the type of file you are about to attach by clicking on the "Type" radio button, and
		then click on the <b>"Apply"</b> button to upload the attachment.
View		
Organization	Admin	• Click on the "Organization" hyperlink in the "Profile Management" navigation panel.
Details		
		• Click on the "Address Book" hyperlink in the "Profile Management" navigation panel.
		• To view a detailed information about the company's address, click on the on the "Pencil"
		icon in the <b>"Update"</b> column.
View Addresses	Admin	RFQ Only Address: Address (and email address) used only to receive sourcing documents
		such as Request for Information, Request for Quotation and/or Auctions.
		<ul> <li>Purchasing Address: Address (and email address) to receive sourcing document such as</li> </ul>
	1	Request for Information, Request for Quotation and/or Auctions and purchasing



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Action	Tab /Screen	Quick Reference
		document such as Purchase Order, Service Orders or Contracts.
		<ul> <li>Payment Address: Address (and email address) to receive payments. Electronic</li> </ul>
		payments require the physical address of your company (and email address).
		IMPORTANT: Contacts can only be updated by the Supplier security Administration in your
View Contacts	Admin	company.
		• Click on the "Contact Directory" hyperlink in the "Profile Management" navigation panel.
		• Click on the "Products and Services" hyperlink in the "Profile Management" navigation
View Products		panel. This screen provides information about your company's registered products and
and Services	Admin	services according to CRC-selected UNSPSC (United Nations Standard Products and Services
and Services		Code) codes and descriptions at the class level. For more information regarding UNSPSC
		codes, visit www.unspsc.org.
		<ul> <li>Click on the "Banking Details" hyperlink in the "Profile Management" navigation panel.</li> </ul>
View Banking	Admin	<ul> <li>To view all bank accounts select "All Accounts" in the "View" dropdown menu.</li> </ul>
Details		<ul> <li>Click on the "Go" button. The primary data for all bank accounts will be shown</li> </ul>
Details		• To view details about a specific bank account, click on the "Pencil" icon in the "Update"
		column.
		• In the "Admin" tab, click on the "Payments and Invoicing" hyperlink in the "Profile
View Payments		Management" navigation panel.
and Invoicing	Admin	<ul> <li>Search for a specific information about your company's payment and invoicing preferences</li> </ul>
Preferences		in the "Search" section. Entering the address name in the "Address Name" field and click on
		the <b>"Go"</b> button.



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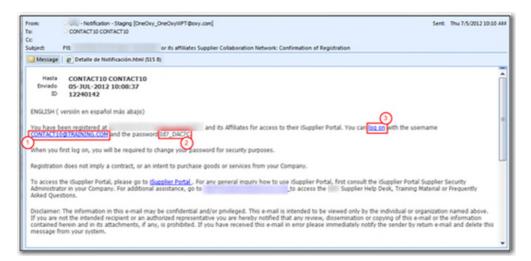
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### INSTRUCTIONS

#### 1. LOGIN, USERNAME, PASSWORDS, ACCESS AND PREFERENCES SETUP

#### 1.1. LOGIN TO THE ISUPPLIER PORTAL

When the Supplier has registered users in the iSupplier Portal, an automatic email notification is sent to confirm the registration in the iSupplier Portal with the Username, temporary password and a link to access the iSupplier Portal. The first login will require you to change your password for security purposes.



- (1) You need to save the assigned Username as you will need that each time you login in the iSupplier Portal.
- (2) You will use the temporary password to log in to the iSupplier Portal.
- (3) Click on the "Log on" hyperlink to access the iSupplier Portal.

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	Solicit a Language Gauge and Thypothel Latine consolication English	
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- (4) In the "User Name" field, enter the Username provided in the registration confirmation email.
- (5) In the **"Password"** field, enter the temporary password provided in the registration confirmation email. **Note:** This field is case sensitive.
- (6) Click on the "Login" button. If login is successful, the system will prompt to change your password.
   Note: If login the portal fails, use the "Login Assistance" hyperlink, see the next section for more information.



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Change Password	
* Current Password	••••••• (7)
* New Password	••••••
* Re-enter New Password	Password must be at least 8 characters long,
* Indicates required field	Submit Cancel

- (7) In the "Current Password" field, enter the temporary password as provided in the confirmation of registration email.
- (8) In the "New Password" field, enter the desired password. The new Password must have the following characteristics:
  - Must be a Minimum of 8 characters in length.
  - Must have at least 1 number.
  - Must have at least 1 character.
  - Can not have repeating characters or numbers. (i.e. it can not have '11' or 'tt' as part of the Password)
  - Can not be the same as a previous Password used password in the iSupplier Portal.
  - Can not contain your user's Username or other Username.
- (9) In the "Re-enter New Password" field, enter the new password again.

**Note:** This field is case sensitive.

(10) Click the **"Submit"** button to continue. The iSupplier Portal Home Tab will then be displayed.

					Navigator •	Favorites	Home Logout Preferences
e Orders 5	hipments Negotia	tions Finar	ce Product Admin				
Search PO Nu	mber •		60				
Notificati	ons					Planning	
					Full List	Regotiation	
Subject				Date		<ul> <li>Invitations</li> </ul>	
No results found.						<ul> <li>Responses</li> </ul>	
						Orders	
2						<ul> <li>Agreements</li> </ul>	
Respon	ses To Regoliations					· Purchase Or	
					Full List	Purchase His	rath.
Response		Status	Negotiation Title	Time 1	oft	Shipments	
tio results found.			and a company of the second			<ul> <li>Overdue Rec</li> <li>Advance Ship</li> </ul>	
201						Receipts	autora de la companya
Orders A	t A Glance						
					Full List	Becelpts     Beturns	
PO Number	Description			Order Date		On-Time Per	formance
25000012603				10-Oct-2012 16:		Invoices	
25090012451	April 1998 March 1998			16-Aug-2012.06:		· Invoices	
25030012101	From other the			04-Aug-2012 10:		Payments	
25000012080	ALC: 1997.		Contraction of the local distance of the loc	25-34-2012 19:1		• Exymenta	
25000011977	Be an other of			19-3ul-2012 10:3	62154	· Captioning	

### 1.2. RECOVER USER NAME AND PASSWORD - LOGIN ASSISTANCE



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In case that Password or Username are forgotten, use the Login Assistance from the "iSupplier Portal Login" screen to request a new Password or recover your Username.

	*User Name *Password (example: mchael.james.anth) (example: 4x.09-v21) Login Assistance 1 Accessibility None	
	Select a Language: تعريبية Español Latinoamericano English	
About this Page Privacy Statement		Copyright (c) 2000, Oracle, All rights reserved.

(1) On the login screen, click on the "Login Assistance" hyperlink. The following screen will appear

Login Assistance	
<ul> <li>Indicates require</li> </ul>	d field
Forgot Passwor	d
Personalize "Forg	ot Password"
	ame, instructions for how to reset your password will be emailed to you.
User Name	Forgot Password
Forgot User Nar	ne
Forgot User Nar Personalize "Forg	
Personalize "Forg	
Personalize "Forg	ot User Name"

- (2) On the "Login Assistance" screen, request a new password by completing the instructions in the "Forgot Password" section.
- (3) In the "Login Assistance" screen, recover your Username by completing the instructions in the "Forgot User Name" section.

Op	otion	1:	Forgot	Password
----	-------	----	--------	----------

Login Assistance	
* Indicates required	îeld
Forgot Password	
Personalize "Forgot	Password"
Enter your user nam	e, instructions for how to reset your password will be emailed to you.
User Name	Forgot Password 5
	(4)



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- (4) In the "User Name" field, enter your User Name to access the iSupplier Portal.
- (5) Click on the **"Forgot Password"** button to reset your Password. This will prompt an email with instructions to be sent automatically to the email address associated with the Username (this may take up to an hour).

From	Sent: Thu 7/5/2022	10.01 444
Tec	CONTACT? CONTACT?	
Co		
Subject		
Messa	ge (Notification Detail.html (607 B)	
То	CONTACT? CONTACT?	-
Sert	CONTACT/ CONTACT/ 05-301-2012 10-00-03	- 11
ID ID	12240141	
	(6)	- 11
The pas	sword for the user CONTACT?@TRADING.COM has been reset.	- 11
The new	v password for the user will be (Mw2)1F2ED (7)	
in the second se	an in a second barran and a characterization of the second s	
	ou log on, you will be required to change your password for security purposes. To access the iSupplier Portal, please go to Supplier Portal general inquiry how to use iSupplier Portal, first consult the iSupplier Portal Supplier Security Administrator in your Company.	S
For add	itional assistance, go to to access the Supplier Help Desk, Training Material or Frequently Asked	- 11
Questão		
	ser: The information in this e-mail may be confidential and/or privileged. This e-mail is intended to be viewed only by the individual or ation named above. If you are not the intended recipient or an authorized representative you are hereby notified that any review,	
disterne	nation or copying of this e-mail or the information contained hermin and in its attachments, if any, is prohibited. If you have received this i more please immediately notify the sender by return e-mail and delete this message from your system.	-
		-

- (6) The notification shows the "User Name" of the iSupplier user whose Password has been reset.
- (7) The notification will provide a temporary Password for the user.
- (8) Click on the **"iSupplier Portal"** hyperlink to access the iSupplier Portal. You will be taken automatically to the **"Change Password"** screen.

	* Current Password	•••••	Ψ
	* New Password	•••••	
	* Re-enter New Password	Password must be at least 8 cha	$ \mathbf{Y} $
Indicates required field		Submit Cancel	acteria iorig-

- (9) In the **"Current Password"** field enter the temporary password provided in the **"Password Reset Notification"** email.
- (10) Populate the "New Password" field and "Re-enter New Password" field. The password must have the following characteristics:
  - Must be a minimum of 8 characters in length
  - Must have at least 1 number
  - Must have at least 1 character
  - Must not have repeating characters or numbers (i.e. it can not have '11' or 'tt' as part of the Password)
  - Can not be the same as any Password previously used in the iSupplier Portal.
  - It can not contain the user's Username.
- (11) Click on the "Submit" button. The "Oracle Application Home Page" will be shown.



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acle Applications Home Page					Logged	In As CONTACT7@TR/
Main Menu	Worldist					
Personalize	•				Full List	
Comparing the security Administrator      Comparing the security Ad	From	on Rules - Red	irect or auto-respond to no	ement 21000024624,0 requires tifications.		
Supplier User - Registration     Supplier User - Transactions	TIP Worki	ist Access - Spe	ecify which users can view	and act upon your notifications.		

**Note:** Alternatively you can contact the iSupplier Portal Security Administrator within your company to request the change of your password.

Option 2: Forgot User Name

name will be emailed to you.
ot User Name (5)
0

- (4) In the "Email" field, enter the email address associated with your account.
- (5) Click on the "Forgot User Name" button. Your User Name will be emailed to you.

Dest	the second s		Sent: Thu 7/5/2012 10:01 Al
CONTACT? CONTACT?			
Ajert			
Message   @ Nutrhiation Detail.html (007	8)		
Te CONTACT? CONTACT?			
Set: 05-301-2012 10:00:03	-		
ID 12240141	(6)		
The password for the user IDNTACT? OTS	AINING COM has been result.		
	Including and the other restored		
The new password for the user will be : M	#2)1F2ED 7		
where the last of the second last		To come the strength former	
When you log on, you will be required to o For any general inquiry how to use cluppli	er Portal, first consult the Guppler Po	tal Supplier Security Administrator i	n your Company.
Fir additional assistance, go to	to access the	Supplier Help Desk, Training Nat	artial or Preizvently Asked
Questions.			
Disclaimer: The information in this e-mail	the second second second second second	They a shall is behaved at the bar	a set to the the set of set
organization named above. If you are not dissemination or copying of this e-mail or	the intended recipient or an authorize	d representative you are hereby not in its attachments, if any, is prohibi-	offed that any review.

- (6) The notification shows the "User Name" of the iSupplier user.
   Note: At this point you can either login to the Portal or reset your password. Follow the step below to perform one of these actions.
- (7) Alternatively, access the Portal by clicking on the "Login" hyperlink.
- (8) Alternatively, reset your password by clicking on the "Reset Password" hyperlink. The "Reset Password" screen will be displayed.



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dicates required field				
	d passwords below. The pas	ssword you enter belo	w will be used to rep	blace your old password.
* User Name		(9)		
* Password				
1000010	(6 characters or more)	(10)		
* Confirm Your Password		$-\gamma$		
	Confirm Password			

- (9) In the "User Name" field enter your User Name.
- (10) Populate the **"Password"** field and **"Confirm Your Password"** field. The Password must have the following characteristics:
  - Must be a Minimum of 8 characters in length.
  - Must have at least 1 number.
  - Must have at least 1 character.
  - Can not have repeating characters or numbers. (i.e. it can not have '11' or 'tt' as part of the Password)
  - Can not be the same as a previous Password used in the iSupplier Portal.
  - Can not contain you user's Username or other Username.
- (11) Click on the "Confirm Password" button. A "Confirmation" message display to signify that the Password has been reset.

Confirmation The password has been reset; use the new password to login to the system.



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### 1.3. DEFINE MAIN PREFERENCES

Once you are logged in the iSupplier Portal, you can change your password at any time by clicking on the **"Preferences"** hyperlink in the **"Oracle Application Home Page"** or any of the iSupplier tabs in the menu options in the top right corner of the screen.

	🕅 Navigator 🔻 🐸 Favorites 👻 Home Lo	gout Preferences Help
ieneral	General Preferences	
Display	Cancel	Reset to Default A
Access Requests	Languages	
<ul> <li>Access Requests</li> </ul>	Current Session Language American English •	
	Default Application Language American English	
	Accessibility	
	Accessibility Features None • 💭	
	Regional	
	Territory United States	
	Date Format dd-MMM-yyyy (04-Oct-2012) •	
	Timezone	
	Number Format 10,000.00 •	
	Currency US Dollar •	
	Client Character Encoding Western European (Windows) •	
	Change Password	
	Known As CONTACT@TRAINING.COM	
	Old Password	
	New Password	
	Repeat Password	
	TIP Please enter your old and new passwords. Passwords are case sensitive.	
	Start Page	
	Responsibility	
	Notifications	

- (1) In the **"Oracle Application Home Page"** click on the **"Preferences"** hyperlink. This will take you to the **"General Preferences"** screen. This screen shows the following sections:
- The **"Languages"** section allows you to set the preferred language to be used in the Portal; the choices are English, Spanish or Arabic.

**Note:** Notifications will be received in the selected language. However, if the selected language is Arabic, the Notifications are sent in English.

- The **"Regional"** section allows you to set preferences for the display of information in the Portal in a format that is familiar to you based on the Region that you are located. The fields you can customize are: the Country, Date Format, Time Zone, Number Format and Currency.
- The "Change password" section allows you to change your password at any time.
- The **"Start page"** section allows you to set the iSupplier responsibility that will display when you first login into iSupplier Portal if you have multiple responsibilities within the Portal. If you only have one responsibility, that will be displayed as the default and there will be no other choices in the drop down menu.
- The "Notifications" section allows you to set preferences to receive your notification.



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### 1.3.1. CHANGE PASSWORD

In the "Change Password" section you can change your password at any time by following the steps outlined below.

Change Passw	ord
Old Passo New Passo Repeat Passo	vord 2
Start Page	
Page	
Notifications	
Email Style	HTML mail with attachments
	Cance] Reset to Default Apply
	4

- (1) In the "Old Password" field, enter your current password.
- (2) In the "New Password" field, enter your desired password.
- (3) In the "Repeat Password" field, rewrite your new password.

Note: Passwords are case sensitive.

**Note:** iSupplier password must have the following characteristics:

- Must be a Minimum of 8 characters in length.
- Must have at least 1 number.
- Must have at least 1 character.
- Can not have repeating characters or numbers. (i.e. it can not have '11' or 'tt' as part of the Password)
- Can not be the same as a previous Password used Password in the iSupplier Portal.
- Can not contain you user's Username or other Username.
- (4) Save any changes by clicking on the "Apply" button.



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### 1.3.2. NOTIFICATIONS SETTINGS

In the **"Notifications"** section you can select how you want to receive your e-mail notifications. This setting does not affect whether notifications are generated or displayed in the iSupplier Portal. For further details about notifications, see section <u>3. - Notifications</u>

**IMPORTANT:** CRC recommends to select the **"HTML mail with attachments"** e-mail notification style. Selecting any other e-mail notification style could mean that you will <u>NOT</u> receive email notifications correctly. However, all Supplier notifications are being managed and displayed within the iSupplier Portal, even if you have chosen the **"Disabled"** or **"Do not send me mail"** style.

Notifications		
Email Style	HTML mail with attachments	(2)
		Cance! Reset to Default Apply

(1) From the **"Email Style"** dropdown menu, select one of the following e-mail notification style to receive notifications in the email account associated with your user account in the iSupplier Portal.

E-mail Notification Style	Description	
Disabled	<u><b>Do not</b></u> select this option.	
Do not send me mail	iSupplier user will not receive notifications to the email account associated with the user account in the iSupplier Portal. However, the notifications are received and shown within the iSupplier Portal in the <b>"Worklist"</b> section in the <b>"Oracle Application Home"</b> Page.	
HTML mail	Email notifications are received in HTML without any attachments.	
HTML mail with attachments	Email notifications are received in HTML with an attached link to <b>"Notification Details"</b> screen.	
HTML Summary Email Email notifications are received in HTML with a summary of al notifications the User.		
Plain text mail	Email notifications are received in plain text without any attachments.	
Plain text mail with HTML attachments	Email notifications are received in plain text with an attached link to the <b>"Notification Details"</b> screen.	
Plain Text Summary mail Email Notifications are received in plain text with a summary of all the notifications the User.		

(2) Save any changes by clicking on the "Apply" button.



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#### 2. ORACLE APPLICATION HOME PAGE

The **"Oracle Application Home Page"** screen provides access to the responsibilities assigned to the user, and also shows and provide access to the latest notifications.

### 2.1. ACCESS TO A SPECIFIC RESPONSIBILITY

Once the user has logged in to the iSupplier Portal, the **"Oracle Application Home Page"** screen will be displayed only if more than one responsibility has been assigned to the user. Otherwise, the iSupplier **"Home"** tab will be shown immediately. The **"Oracle Application Home Page"** screen contains two main sections.

				📓 Favorites 👻	Logout	Preferences 1		Page
Applications Home Page      Main Menu      Personalize      Suppler Security Administrator      Suppler User - France View      Suppler User - Full Vie	Worklist From ✓TIP Vacat ✓TIP Workl	Type PO Approv ion Rules - Redire Ist Access - Spec	ect or auto-resp	rond to notifications. can view and act upo	n your notifications.	\$ 2	Full Li	st Due
C Suppler User - Transactions	2							

- (1) The "Worklist" panel shows the most recent notifications. Access the full list of notifications by clicking on the "Full List" button. If there are no notifications listed, no transactions are in progress. For further information regarding notifications, see the section <u>3. - Notifications</u>.
- (2) The "Main Menu" panel, also called the "Navigator" panel shows all of your assigned responsibilities. Access the desired functionality by clicking on the applicable responsibility hyperlink. If you do not see any hyperlinks, please contact the iSupplier Portal Security Administrator in your company.
   Note: If the User only has one responsibility the "Home" tab screen for that responsibility will automatically be displayed.



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### 2.2. RESPONSIBILITIES AVAILABLE FOR ISUPPLIER PORTAL USERS

There are five different responsibilities used in navigating the iSupplier Portal. Access will be granted according to the responsibilities assigned to you.

Responsibilities	Description	Assign To
Supplier Security Administrator	Administrate Supplier user access and Supplier profile data. This responsibility allows the user to access the <b>"Admin"</b> tab.	<ul> <li>Only iSupplier Portal Security Administrator and an alternate.</li> </ul>
Supplier User - Registration	Temporary responsibility to complete the Supplier registration and qualification process. This responsibility allows the user to access the <b>"Negotiation"</b> tab and <b>"Admin"</b> tab.	<ul> <li>iSupplier Portal Security Administrator.</li> <li>User who will be responsible for performing the Supplier registration and qualification process.</li> </ul>
Supplier User - Full View	View all the information available in the iSupplier Portal. This responsibility allows the user to access all available tabs within the portal.	<ul> <li>iSupplier Portal Security Administrator.</li> <li>User who needs to view information but does not have the authority to enter data on behalf of the Supplier in the iSupplier Portal.</li> </ul>
Supplier User - Transactions	Perform actions related to all the processes available in the iSupplier Portal except administering Supplier users and Supplier profile data. This responsibility allows the user to access all available tabs within the portal.	<ul> <li>iSupplier Portal Security Administrator.</li> <li>User who needs to view the information and has the authority to enter data on behalf of the Supplier.</li> </ul>
Supplier User - Finance View	View invoices and payment information. This responsibility allows the user to access the "Order" tab, "Finance" tab and "Admin" tab.	<ul> <li>iSupplier Portal Security Administrator.</li> <li>User who only needs to view purchasing documents, invoices and payments.</li> </ul>
Supplier User - Invoicing	Create/view invoices and credit memos, and also view payment information. This responsibility allows the user to access the "Order" tab, "Finance" tab and "Admin" tab.	<ul> <li>•iSupplier Portal security Administrator.</li> <li>User who only needs to view purchasing documents, invoices and payments, and also has the authority to create invoices and credit memos on behalf of the Supplier.</li> </ul>



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### 3. NOTIFICATIONS

Notifications are automatically sent from the system to a Supplier (or a specific Supplier's contact) to notify them that:

- A specific event has been executed by CRC and no action is required from the Supplier (e.g. payments).
- A specific event has been executed by CRC and an action is required from the Supplier (e.g. acknowledgement required).

Note: Periodically reminders are sent until the action is completed.

The appropriate CRC personnel will receive notifications when a Supplier executes an action through the iSupplier Portal.

**IMPORTANT:** For automatic notifications the email sender will be "CRC – Notification" not a specific person. If you do not receive a notification in your mailbox please check your mailbox spam, trash or delete folders to 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 Home Tab – Notification Table to review the notification there.

The main notifications a Supplier might receive are:

Process	Supplier Action	Key Notifications		
iSupplier Portal User	Administrate iSupplier Portal users	Confirmation of registration		
Administration		<ul> <li>Username look up</li> </ul>		
		<ul> <li>Password reset</li> </ul>		
Registration	• View and Update Supplier Profile	<ul> <li>Confirmation of registration</li> </ul>		
	data			
Pre-Qualification	Respond to:	<ul> <li>Invitation to qualification event</li> </ul>		
	<ul> <li>Request for Information (RFI)</li> </ul>	<ul> <li>Qualification event closed</li> </ul>		
	<ul> <li>Pre-Qualification</li> </ul>			
	Questionnaire			
Sourcing	Respond to:	<ul> <li>Invitation to negotiation event</li> </ul>		
	<ul> <li>Request for Information (RFI)</li> </ul>	<ul> <li>Negotiation event opened to bid</li> </ul>		
	<ul> <li>Pre-Screening</li> </ul>	• Negotiation event extended time to		
	<ul> <li>Technical Evaluation</li> </ul>	bid		
	<ul> <li>Request for Quotation (RFQ)</li> </ul>	<ul> <li>Negotiation event closed to bid</li> </ul>		
	<ul> <li>Commercial Evaluation</li> </ul>	<ul> <li>Negotiation event amendment</li> </ul>		
	Auction	<ul> <li>Negotiation event cancelled</li> </ul>		
Purchasing	• View and acknowledge purchasing	For Your Review		
	documents, including Terms and	<ul> <li>Standard Purchase Order requires</li> </ul>		
	Conditions	your acceptance.		
Contractual Deliverables	• View and submit contractual	Deliverable is overdue		
	deliverables	<ul> <li>Deliverable status change</li> </ul>		
Shipments	• View, create and cancel Advance	N/A		
	Shipment Notice (ASN)			



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Process	Supplier Action	Key Notifications
Receiving and Rejections	<ul> <li>View receipts and returns</li> </ul>	N/A
	<ul> <li>View Consignment inventory</li> </ul>	
	<ul> <li>View Supplier items</li> </ul>	
Performance Monitoring	View and submit purchasing document	<ul> <li>Invitation to objectives event</li> </ul>
	data by using a Request for	<ul> <li>Invitation to non conformity event</li> </ul>
	Information (RFI), related to:	<ul> <li>Invitation to performance scorecard</li> </ul>
	Objectives	event
	<ul> <li>Non Conformities</li> </ul>	
	Performance Scorecards	
	View and Submit Purchasing Document	<ul> <li>Deliverable is overdue</li> </ul>
	data related to:	<ul> <li>Deliverable status change</li> </ul>
	Issues	
	Quality Meetings	
Invoicing	View Invoices	N/A
Payments	View Payments	<ul> <li>Payment remittance advices</li> </ul>

# 3.1. TYPES OF NOTIFICATIONS

iSupplier users simultaneously receive notifications by:

**Option 1:** System generated email (Sender: "CRC – Notifications") to the email account associated with the user account in the iSupplier Portal. The following screenshot is an example of an email notification.

YOR:						Sent	Fn 7/6/2012 10:07 A
1	OCONTACT CONTACT						
6							
ubject:	Action Required			- You are potentially it	nvited RFQ 470233(SUPPLIER TRAINING)		
- Meisage	Notification Detail	Lintuni (502 8)					
from	Summer of Assessment		Company				
To	CONTACT CONTAC			SUPPLIER TRAININ	10		
Sent	05-JUL-2012 10:0			470233			
Due	13-JUL-2012 09:5						
3D	12240334						
below befo	te acknowledging or d to Negotiation Details ory	lectining. page if you war	t to view the document	before acknowledging	witation, press the No button. You may intent to participate and/or to enter a n		an or space
Num A	ctioe Date			CONTACT CONT			
Action Hist		Action	From	Te	Details		

(1) To respond to a notification, click on the applicable hyperlink to access the iSupplier Portal. In the example above click on the **"Negotiation Details"** hyperlink and go to the corresponding screen to take the appropriate action.

**Note:** Clicking on the hyperlink will bring you to the iSupplier Portal **"Login"** screen.

Intellectual property restrictions. CRC proprietary information.

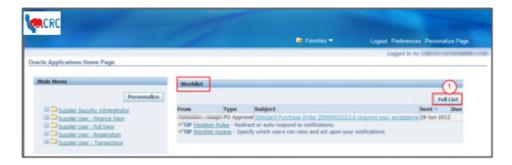


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**Note:** Notifications can have additional links to access specific documentation within the Portal. Go to the section <u>3.2. - View Notification Details</u> to learn about the notification's details.

**Option 2:** Oracle notifications are shown within the iSupplier Portal in the **"Worklist"** section in the **"Oracle Application Home"** Page. They also are shown in the **"Notifications"** section in the **"Home"** tab.



(1) To display all the notifications, click on the "Full List" button.

Home Orders Shipments Negotiations	Finance Product Admin			
View Open Notifications - 60 (2				
Select Notifications: Open Reassign	Close			
Select All Select Nor 3 4		6	6)	$\square$
Select From Type	Subject	$\mathbf{O}$	Sent -	Due
PO Approval	Standard Purchase Order 25000010323,0 re	equires your acceptance	29-Jun-2012	
Sourcing Publish	or its Af	filiates - You are potentially invited REQ 470233(SUPPLIER TRAINING)	06-Jul-2012	13-Jul-2012
Sourcing Publish		(liates - You are potentially invited REO 470230(REO- SUPPLIER TRAINING)	06-Jul-2012	18-Jul-2012
TIP Vacation Rules - Redirect or auto-respino TIP Worklist Access - Specify which users can				

- (2) Click on the **"Go"** button. As needed use the **"View"** dropdown menu to select different view (i.e. Open Notifications, FYI Notifications, and To Do Notifications). The screen will then display the notifications according to the selection.
- (3) The **"From"** column shows who sent the notification from CRC. The name is necessary to know when making any inquiry to CRC's Supplier Help Desk regarding the notification.
- (4) The "Type" column shows the notification type, this is an internal iSupplier Portal classification.
- (5) The **"Subject"** column shows the subject of the notification. In general, it provides the transaction number and indicates if the notification is for your information or if an action is required. To see the details of a notification, click on the **"Notification Subject"** hyperlink.

**Note:** Examples of these messages are:

- Action to be taken (e.g.: 'You are invited... 'or '...will be due in 2 weeks').
- Document type (e.g. RFQ or Deliverable).
- Document number or document related (i.e. RFQ 19001 or Blanket Purchasing Agreement 210000001518).
- (6) The "Sent" column shows the date when the notification was generated.
- (7) The "Due" column shows the due date for any required action to take place.



### 3.2. VIEW NOTIFICATIONS DETAILS

Notice that the notifications received either through an email or the iSupplier Portal has the same sections, which are explained below.

Email Notification	Oracle Notification
Participant     Serie: Pro18(A0012)3017 AM       Participant     Contract: Contract: Transmission       Participant     Serie: Pro18(A0012)3017 AM       Participant <t< td=""><td>Name: Orderers: Minjamonity Regulation: Thesaire Product industs       Product Control of Co</td></t<>	Name: Orderers: Minjamonity Regulation: Thesaire Product industs       Product Control of Co
Devel your company intend to particular the two and tw	Reducts in 200304 El Depise west notification after my requirese

- (1) The "Notification details" section shows the general data regarding the notification including who sent the notification, important dates associated with the event and the subject matter.
  - The **"From"** field identifies the CRC contact who initiated the notification. The contact name is important to have when making any inquiry to CRC's Supplier Help Desk regarding the notification.
  - The "Number" field identifies the event related to the notification. This number is necessary for searching for details of the event related to the notification in the iSupplier Portal.
- (2) The "Message body" section shows detailed information regarding the event and required actions. If applicable, there will be hyperlinks to access a specific screen or transaction in the iSupplier Portal.
- (3) If applicable, the "Action History" table will be displayed with all the actions taken related to this event. (Supplier and CRC actions).
- (4) If applicable, the "Response" section will be shown. This section is for information purposes only. It is included to make the Supplier aware that a Response will be required for this notification. <u>Do not use this section to submit a response</u>. Also, do not click on the "Actions" button on the notifications. To accept or reject documents, access the "CRC Registered Supplier webpage" and follow the User Guide Instructions provided for the respective notification type.



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# 3.3. SUPPLIER ACTIONS ACCORDING TO THE NOTIFICATION RECEIVED

The following table shows the respective User Guide to use for each function within the iSupplier Portal and notification type if there is one. These User Guides describe how to access the key iSupplier Portal functionality to complete the required action.

Process	Key Notifications	Supplier Action – User Guide to use
iSupplier Portal	<ul> <li>Username look up</li> </ul>	See Sections:
User	<ul> <li>Password reset</li> </ul>	1.1. Login to the iSupplier Portal.
Administration		1.2. Get User Name or Reset Password.
Registration	Invitation to Register	• User Guide - Submit Prospective Supplier
		Registration Form
Registration	Confirmation of registration	<ul> <li>View and Update the Organization Information. See section <u>4.7 Admin Tab</u></li> </ul>
Pre-Qualification	<ul> <li>Invitation to qualification event</li> </ul>	• User Guide - Respond to Request for
	<ul> <li>Qualification event closed</li> </ul>	Information (RFI)
Sourcing	<ul> <li>Invitation to negotiation event</li> </ul>	• User Guide – Quote Request for Quotation
	<ul> <li>Negotiation event opened to bid</li> </ul>	<u>(RFQ)</u>
	<ul> <li>Negotiation event extended to bid</li> </ul>	• User Guide – Respond to Request for
	<ul> <li>Negotiation event closed to bid</li> </ul>	Information (RFI)
	<ul> <li>Negotiation event amendment</li> </ul>	
	<ul> <li>Negotiation event cancelled</li> </ul>	
Purchasing	For Your Review	• User Guide – View and Accept Purchasing
	• Standard Purchase Order requires	<u>Document</u>
	your acceptance.	
Contractual	<ul> <li>Deliverable is overdue</li> </ul>	<ul> <li><u>User Guide – View and/or Submit Contractual</u></li> </ul>
Deliverable	<ul> <li>Deliverable status change</li> </ul>	<u>Deliverables</u>
Shipments	N/A	<ul> <li><u>User Guide</u> – View and Create Advance</li> </ul>
		<u>Shipping Notices</u> .
Receiving and	N/A	• View receipts and returns (User Guide – View
Rejections		and Create Advance Shipping Notices)
		<ul> <li><u>View Consignment inventory</u></li> </ul>
		• View Supplier items
Performance	<ul> <li>Invitation to objectives event</li> </ul>	View and submit purchasing document data by
Monitoring	<ul> <li>Invitation to non conformity event</li> </ul>	using a Request for Information (RFI), related to:
	• Invitation to performance scorecard	Objectives
	event	<ul> <li>Non Conformities</li> </ul>
		<ul> <li>Performance Scorecards</li> </ul>
	Deliverable is overdue	User Guide - View and Submit Contractual
	<ul> <li>Deliverable status change</li> </ul>	<u>Deliverables</u>
Invoicing	N/A	User Guide- View Invoices and Payments
Payments	Payment remittance advices	User Guide- View Invoices and Payments



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### 3.4. NOTIFICATION DELEGATION – GRANT WORKLIST ACCESS

You can set up other iSupplier Portal users within your company so that they can access your work list in the iSupplier Portal. Notification delegation allows sharing all or just specific notifications with someone else.

ne Orders	Shipments	Negotiations	Finance Produ	ct Admin	
Search PO	Number	•	Go		
Notifi	cations				
Noun	Cauons				Full List (1)
					Tun List
Subject					Date

(1) In the iSupplier Portal **"Home"** Tab in the **"Notifications"** section, find the list of your pending notifications. To display all the notifications, click on the **"Full List"** button.

Home Orders Shipm	ents Negotiations F	inance Product Admin		
View All Notifications	← Go			
Select Notifications:	Open Reassign C	lose		
Select All Select None				
Select From	Туре	Subject	Sent 🔺	Due
	PO Approval	Standard Purchase Order 25000010323,0 requires your acceptance	29-Jun-2012	
TIP Vacation Rules - Re	direct or auto-respond to r	otifications.		
Vorklist Access - S	pecify which users can view	v and act upon your notifications. (2)		

(2) Click on the "Worklist Access" hyperlink at the bottom of the screen.

Oracle Applications Home Page	e > Worklist >					
Worklist Access						
The following users have access	s to view and act upon your	worklist				
Grant Worklist Access	(3)					
Name	Description	Start Date	End Date	Status	Update	Delete
No results found.						
Return to Worklist						
Keturn to workinst						



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#### (3) Click on the "Grant Worklist Access" button.

Oracle Applications Home Page > Worklist > Worklist Access >	
Grant Worklist Access	
Grant another user access to view and act upon your notifications via the Worklist.	Cance! Apply
* Indicates required field	(4)
* Name	All Employees and Users 🔹 🔊
Description	(5)
	05-Jul-2012 🔲 (6)
End Date	example: 20-3/ur-20121
Grant Access to	O All Item Types
•	Selected Item Types
Available Item Types	Selected Item Types
PO Approval	Move       Box       Box       Move All       So       Remove       Box
۱ 	Remove Al [1] 10 Cancel Apply

- (4) In the "Name" field, select the iSupplier Portal user within your company that you would like to grant access to your worklist.
- (5) In the "Description" field, write any description to indicate the reason, purpose or scope of the delegation.
- (6) In the "Start Date" field click on the "Calendar" icon to select the effective date to grant the access.
- (7) In the "End Date" field, click on the "Calendar" icon to select the effective date to cancel the access only if you want to limit the access to a certain period of time.
- (8) In the "Grant Access to" section, select from the following:
  - "All Item Types" radio button: To share all your notifications with someone else.
  - "Selected Item Types" radio button: To specify which notification will be shared.
- (9) If you have not granted access to All Item Types, to specify which types of notifications will be shared, in the "Available Item Types" box, select the notification types to share by clicking on the appropriate types.
- (10) Click on the "Move Arrow" icon to transfer the item to the "Selected Item Types" box.
- (11) Once you have finished selecting the items, click on the "Apply" button. The "Worklist Access" screen will show the new setup.

Worklist Access						
The following users have access to vi	ew and act upon your worklist				(12)	(13)
Grant Worklist Access						
Name	Description	Start Date	End Date	Status	Update	Delete
CONTACT1 CONTACT1	*NULL*	05-Jul-2012		Active	1	8

- (12) You can also update the "Worklist Access" by clicking on the "Pencil" icon in the "Update" column.
- (13) You can remove a contact from the "Worklist Access" by clicking on the "Trash can" icon in the "Delete" column.



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### 3.5. NOTIFICATION DELEGATION - VACATION RULES

When applicable, set the **"Vacation Rules"** to auto respond or redirect notifications within your organization during times when you will not be available to respond to notifications.

ne Orders	Shipments	Negotiations	Finance	Product	Admin	
Search P	O Number	•		Go		
Noti						
E Noti	fications					Full List (1)
						Date
Subject						

(1) In the iSupplier Portal **"Home"** Tab in the **"Notifications"** section, find the list of your pending notifications. To display all the notifications, click on the **"Full List"** button.

Home Orders Shipme	ents Negotiations I	Finance Product Admin		_
View All Notifications				
	Open Reassign (	Close		
Select All Select None				
Select From	Туре	Subject	Sent 🔺	Due
Select From	PO Approval	Subject Standard Purchase Order 25000010323,0 requires your acceptance	Sent	Due

(2) Click on the "Vacation Rules" hyperlink. The following screen will appear.

Oracle Applications Home Page > Worklist >					
Vacation Rules					
Create Rule 3					
Rule Name	Item Type	Notification	Update	Delete	Status
You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.					
Return to Worklist					

(3) Click on the "Create Rule" button.

0	0	0
Item Type	Notification	Rule Response
Vacation Rule: Item Type		
Select the type of notification that will activate this rule.		
Item Type PO Approval 🔻		
All ypu will skip to Step 3.		5
Return to Vacation Rules		Step 1 of 3 Next
		Step 1 01 3 Wex

(4) Click in the **"Item Type"** dropdown menu and select the type of notification that will be rerouted. For this example, a specific notification type has been selected to activate the Vacation Rule.

**Note:** You can set the rule for a specific item or all items. If you select all items, skip to step 8.

(5) Click the "Next" button. The "Vacation Rules: Notification" screen will be displayed.

0	0	0
Item Type	Notification	Rule Response
acation Rule: Notification		
Indicate the notification format that will activate this	rule	
Item Type PO Approval		
Notification 💿 All		
Select	_ Q (6)	$\overline{\mathcal{T}}$
		Cancel Back Step 2 of 3 Next



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- (6) In the "Notification" option, select:
  - "All": To delegate/transfer all notifications related to the selected notification type.
  - **"Select"**: To delegate/transfer selected notifications, click on the **"Magnifying Glass"** icon to look up the specific notifications. Use the "%" symbol to broaden the range of results.
- (7) Click on the **"Next"** button.

Item Type	Notification		Q Rule Response
ation Rule: Response			
dicates required field			
Item Type PO Approval			
Notification All			
* Start Date 05-Jul-2012 21:42:33			
(example: 05-Jul-2012 21:42:33)			
End Date			
Message			
	*		
Comments will display with each rout     Reassign All Employees and Users	V A		
Delegate your response			
A manager may delegate all noti			
Transfer notification own	ation for a specific project to the new manager of that project.		
Personalize Stack Layout: (RespondRN)	addit for a specific project to the new manager or that project.		
Deliver notifications to me regardless of	any general rules	(12)	
0			
			Cancel Back Step 3 of 3 Ap

- (8) In the "Start Date" field, select the effective date to implement the rule by clicking on the "Calendar" icon.
- (9) In the "End Date" field, select the effective date to cancel the rule by clicking on the "Calendar" icon.
- (10) In the "Message" field you can write a message that will display with each routed notification.
- (11) In the **"Reassign"** field, click on the **"Magnifying Glass"** icon to look up the iSupplier Portal user who you are requesting to receive the selected notifications.
  - In the "Reassign" section, select:
    - "Delegate your response" radio button: Select this option if you want to give another user authority to respond the notifications on your behalf but you want to retain ownership of the notification. For example, a manager might delegate all requests to an assistant.
    - "Transfer notification ownership" radio button: Select this option to give another user complete ownership and responsibility for the notification. For example, use this option if you are not the correct contact for the specific notification and you want to send it to the correct recipient or to another recipient for resolution.
- (12) Optionally, select the "Deliver notifications to me regardless of any general rules" radio button to leave the notification in your "Worklist" with no automatic processing. Define a rule with this action to exclude a certain subset of notifications from a more encompassing rule. Click on the "Apply" button. The "Vacation Rules" screen will then show the new delegations.

acation Rules					
Create Rule			13		_
ule Name	Item Type	Notification	Update	Delete	Status
elegate: CONTACT3 CONTACT3	PO Approval	<all></all>	1	Î	Active

- (13) To update the access attributes of the "Vacation Rules" click on the "Pencil" icon in the "Update" column.
- (14) To remove the access click on the "Trash can" icon in the "Delete" column.



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#### 4. NAVIGATION

### 4.1. HOME TAB

If more than one type of responsibility has been assigned, select the appropriate responsibility on the **"Oracle Applications Home Page"** to accomplish the task that has been assigned. If only one responsibility has been assigned, the iSupplier portal **"Home"** Tab screen will be shown immediately and there will be no other responsibilities displayed

e Orders S	Shipments Negotiations Finance	Product Admin 1		
Search PO Nu	mber 👻	Go (2)		
Notificat	ione			Personalize "Home Page Right Column"
nouncau	JOILS		Full List	Planning
Subject			Date	Negotiation
	ase Order 25000010323,0 requires you	acceptance	29-Jun-2012 15:17:04	Invitations     Responses
				Orders
Respon	nses To Negotiations		Full Li	Agreements     Purchase Orders     Purchase History
Response	Status	Negotiation Title	Time Left	4 Shipments
No results found	L.			Overdue Receipts
Orders A	At A Glance			Advance Shipment Notices
orderov	ie / Gamee		Full List	Receipts
PO Number	Description		Order Date	Receipts     Returns
25000010323	QT-13198 - BAILEY BIRKETT PRV		29-Jun-2012 15:17:01	On-Time Performance
25000008907	PR-15-10606 - SILINGS		12-Apr-2012 03:50:03	Invoices
25000010006	MR 15000011997 = BULL DOG GRIP	S & SLINGS FOR STOCK	25-Mar-2012 06:20:34	Invoices
25000010009	QT-13447 - WIRE ROPE SLINGS		25-Mar-2012 02:31:42	Downwards.
25000009331	MR: 15000011658 - STOCK REP: SI	ING	16-Feb-2012 03:50:52	5 Payments
				Payments

**Note:** Some sections will only appear if there are transactions that are in progress or that have taken place. The responsibility being used will dictate which tabs appear.

- (1) The **"Home"** tabs allow quickly access to others functionalities, such as Orders, Shipments, Negotiations, Finance, Products, Admin and each of their related functionalities.
- (2) The "**Search**" section allows different types of searches to be selected by using the dropdown menu (Purchase orders, Shipments, Invoices, and Payments). In the empty box, enter the document number or the "%" symbol. Use the wildcard "%" symbol to broaden the range of results.
- (3) The "Notifications" section shows the notifications waiting for your review. Some notifications are view-only, while other notifications require action. To open and view your notifications, click the "Subject" hyperlink. Click on the "Full List" button to display all notifications.
- (4) The "Responses to Negotiations" section shows the list of draft and active responses to open sourcing events. Click the "Response" hyperlink number to open and view a response. Click on the "Full List" button to display all responses.
- (5) The **"Orders at a Glance"** section shows the list of the most recent purchasing documents (PO). Click a purchase order number to view purchase order details. Click the Full List button to display all purchasing documents.
- (6) The "Quick links" section shows the shortcuts to the main functionalities and web pages. Click any hyperlink to go directly to a screen.

**Note:** If applicable, the **"Shipments at a Glance"** list will appear in the iSupplier Portal **"Home"** tab. This is a list of shipments. Click a **"Shipment number"** hyperlink to open and view shipment details. Click on the **"Full List"** button to display all shipments.



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### 4.1.1. SEARCH OPTION

The iSupplier Portal provides extensive search criteria on all screens to help retrieve information. Broaden the searching results by using "%" symbol in any searching criteria. Once the results are displayed, sort them by clicking any column headings. Follow the steps outlined below to conduct a quick search from the "Home" tab.

me Orders 5	Shipments Negot	iations Finance	Product Admin			
Search PO Nu PO Nu	mber	(2)	Go 3			
Shipm No Invoice	ent Number Number	$\mathbf{\vee}$				Personalize "Home Page Right Column"
Payme	nt Number				full List	Planning
Subject				Date		Negotiation
Standard Purcha	ase Order 250000103	23,0 requires your a	acceptance	29-Jun-2	012 15:17:04	Invitations     Responses
-						Orders
Respon	nses To Negotiation	ns			Full List	Agreements     Purchase Orders     Purchase History
Response		Status	Negotiation Title	Т	ime Left	Shipments
No results found						Overdue Receipts     Advance Shipment Notices
Orders /	At A Glance					Receipts
					Full List	Receipts
PO Number	Description			Order	Date	<u>Returns</u>
25000010323	QT-13198 - BAILE	EY BIRKETT PRV		29-Jun	-2012 15:17:01	On-Time Performance
25000008907	PR-15-10606 - SI	LINGS		12-Apr	-2012 03:50:03	Invoices
25000010006	MR 15000011997	= BULL DOG GRIPS	& SLINGS FOR STOCK	25-Mai	-2012 06:20:34	Invoices
25000010009	QT-13447 - WIRE	ROPE SLINGS		25-Mai	-2012 02:31:42	Payments
25000009331	MR: 1500001165	8 - STOCK REP: SLIM	١G	16-Feb	-2012 03:50:52	
						Payments

- (1) Choose the type of search from the dropdown menu (i.e.: Purchase orders, Shipments, Invoices, and Payments).
- (2) In the empty box, enter the document number or "%" symbol.
- (3) Click on the **"Go"** button to begin the search. The required information will appear according to the search criteria.

### 4.2. ORDERS TAB

The **"Orders"** tab shows all of the orders generated in the iSupplier Portal between CRC and the Supplier. Supplier will be able to view or print the purchasing documents as well as electronically execute the purchasing document acceptance in the **"Orders"** tab. To get more information about how to use the iSupplier Portal **"Orders"** tab, go to the <u>"User Guide – View and Accept Purchasing Documents"</u> or the <u>"User Guide – View and Submit Contractual Deliverables"</u>.



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#### 4.3. SHIPMENTS TAB

For more information about how to access the iSupplier Portal **"Shipments"** tab, view the <u>"User Guide - View and</u> <u>Create Advance Shipping Notices"</u>

### 4.4. NEGOTIATIONS TAB

For more information about how to access the iSupplier Portal **"Negotiation"** tab, view the <u>"User Guide – Respond</u> to Request for Information (RFI)" or <u>"User Guide – Quote Request for Quotation (RFQ)"</u>

#### 4.5. FINANCE TAB

For more information about how to access the iSupplier Portal **"Finance"** tab, view the <u>"User Guide – View</u> <u>Invoices and Payments"</u>

#### 4.6. PRODUCT TAB

The iSupplier Portal **"Product"** tab shows all of the transactions related to specific products that your company populated in the iSupplier Portal.

#### 4.6.1. VIEW PRODUCT INFORMATION

Access the "Product" tab to view and track all of CRC's transactions related to your company's products.

me	Orders	Shipments	Negotiations	Finance	Product	Admin		
Se	arch PO	Number	•		Go			
	Notific	ations						
	Notific	ations						Full List
_	Notific	ations					Date	

(1) In the iSupplier portal "Home" page, click on the "Product" tab.



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Home Orders Shipments Regotiations Finance Product Admin	
Supplier Items 2	
Simple Search	
Note that the search is case insensitive	Advanced Search
Supplier Item	
Rem 🔄 🔍	
Item Description	
Go Clear	
Organization Supplier Item Item Item Description UOM Buyer Orders Overdue Receipt History Defects Returns On-Time Performance Invent	tory Consigned Inventory
огранизации энфриет исна исна исна исна исна исна исна исна	ory consigned inventory

- (2) In the "Product" tab click on the "Supplier Items" hyperlink.
- (3) In the **"Simple Search"** section, populate search criteria and click on the **"Go"** button to access applicable product information.
- (4) The "Supplier Item" column shows Supplier item number.
- (5) The "Item" column shows CRC item catalog number.
- (6) The "Cross Reference" columns allow access to specific Orders, Receipts, Returns, etc, related to a specific product.

### 4.6.2. VIEW CONSIGNED INVENTORY

The **"Consigned Inventory"** sub-tab allows you to track and view all of CRC's transactions related to your company's consigned products under the categories: On-hand, Shipments, Advices, Receipt and Transactions.

	ments Negotiatio	ns Finance	Produ	ct Admin					_	
Consigned 2	Consigned Items	U								
Consigned Inventory	Simple Search									
Aging	Note that the search	is case insens	itive						l	Advanced Search
	Supplier Item	1		Ы	9					
	Item				۹ (3)					
	Item Description				Γ					
		Go Cle	ar							
	Organization	Supplier Item		em scription	Consigned On- Hand	Consigned Shipments	Consumption Advices	Consigned Receipts	Consigned Returns	Material Transactions
	No search conducted.									
		(4)	(5)					6		

- (1) In the **"Product**" tab click on the **"Consigned Inventory"** hyperlink.
- (2) Click on the "Consigned Inventory" hyperlink.
- (3) In the **"Simple Search"** section populate the search criteria and click on the **"Go"** button to access applicable product information.
- (4) The "Supplier Item" column shows Supplier item number.
- (5) The "Item" column shows CRC's item catalog number.
- (6) The "Cross reference" columns shows links to access the specific Orders, Receipts, Returns, etc, related to a specific product.



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### 4.6.3. VIEW CONSIGNED INVENTORY AGING

The **"Consigned Inventory"** sub-tab also allows you to view the number of days an item has aged through CRC's transactions related to your company's consigned products.

	ments Negotia		Product	Admin					
Consigned Inventory	Consigned Inve	entory Aging							
Inventory Aging	Export	4) v	iew Due in	anext 15 days 🔹	Go Clear				Advanced Search
	Supplier Site No results found.	Si Organization It	ıpplier em	Item Item Revision	Item Description	Subinventory UOM Quantit	Receipt y Date	Consume Before	Days Before Consumption is Due
						5			

- (1) In the **"Product**" tab click on the **"Consigned Inventory"** hyperlink.
- (2) Click on the "Consigned Inventory Aging" hyperlink.
- (3) In the **"View"** dropdown menu, select the number of days the item has aged. Then click on the **"Go"** button to display the information.
- (4) You can also click on the **"Export"** button to export aged line items to analyze the information outside of the iSupplier Portal.
- (5) The "Line item" section shows the detailed information about an aged item.

#### 4.7. ADMIN TAB

The **"Admin"** Tab is where you can view and manage key company profile details used to establish or maintain a business relationship with CRC. This profile information includes organizational data, addresses, contacts, banking details and products and services.

**IMPORTANT: Information in the "Admin" Tab can only be entered or updated by the Supplier during the registration and pre-qualification process.** Once the pre-qualification process has been completed, this data can only be viewed. If the Supplier identifies any data that needs to be added, modified or removed, please use the Supplier Registration Information Modification Form available at <a href="http://iSuppliersupport.CRC.com">http://iSuppliersupport.CRC.com</a> to submit any changes.



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### 4.7.1. ACCESS ADMIN TAB - VIEW GENERAL INFORMATION

The **"General"** screen shows your company's relevant information. Click on the **"Admin"** tab in the iSupplier portal **"Home"** page. Then, the **"General"** screen will appear.

General	General									
Company Profile Organization Address Book Contact		lier Numb Ali oplier Nan	ne			Tax Registrati	axpayer ID	1082/1		2
Product &	Attachments									
rvices										
<b>Banking Details</b>	Search									
Payment & oicing	Search Note that the search is case insensitiv Title H Show More Search Options	/e	Go							
Payment &	Note that the search is case insensitiv Title	/e	Go							
Payment & bicing	Note that the search is case insensitiv Title H Show More Search Options		Go Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalo
Payment & oicing	Note that the search is case insensitiv Title Show More Search Options Add Attachment			Category From Supplier	Last Updated By	Last Updated 09-Jun-2011	Usage One-Time	Update	Delete	Publish to Catalo
Payment & oicing	Note that the search is case insensitiv Title Show More Search Options Add Attachment Title	Туре			Last Updated By					
Payment & oicing	Note that the search is case insensitiv Title  Show More Search Options  Add Attachment  Title Commercial Business Registration	Type File	Description	From Supplier	Last Updated By	09-Jun-2011	One-Time	1	Û	<b>B</b> .

- (1) The **"Profile Management"** panel shows the profile section. Access each section by clicking on the respective hyperlink.
- (2) The "General" section shows your company's basic information.
- (3) The "Attachments" section shows any attachments provided by the Supplier. Specific attachments can be accessed by clicking on the attachment "Title" hyperlink.

Note: Delete an attachment by clicking the "Trash can" icon in the "Delete" column.

**IMPORTANT:** Only users that have been assigned the Supplier Security Administrator and Supplier User – Transactions responsibilities, can view the "Attachments" section.



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### 4.7.2. SEARCH AND UPDATE ATTACHMENTS

In the "Attachment" section view, update and delete attachments.

Search									
Note that the search is case insensitiv Title		G0 (2)							
Add Attachment			(4)				(5)		
Add Attachment 3	Туре	Description	4 Category	Last Updated By	Last Updated	Usage	5 Update	Delete	Publish to Catalo
Title	Type File	Description		Last Updated By	Last Updated 09-Jun-2011	Usage One-Time	5 Update	Delete	Publish to Catalo
Add Attachment 3 Title Commercial Business Registration Attachment - Example 1		Description Attachment - Example 1	Category	Last Updated By		5			Publish to Catalo

- (1) In the "Title" field, enter the name of the attachment or the "%" symbol to broaden the search.
- (2) Click on the "Go" button to see the list of attachments that met the search criteria.
- Note: Increase the search options by clicking on the "Show More Search Options" hyperlink.
- (3) View specific attachment content by clicking on the attachment "Title" hyperlink.
- (4) The "Category" field shows the type of attachment.
- (5) Update an attachment by clicking the "Pencil" icon in the "Update" column. The following screen will appear.

Home Orders Shipments Negotiations Finance Product Admin	
Profile Management	
Update Attachment: Attachment - Example 1	
	Cance! Apply
Attachment Summary Information	
Title Attachment - Example 1 Description Attachment - Example 1 Category From Suppler V Miscellaneous 8 Miscellaneous 8	
File	Browse
	(10) Cancel Apply

- (6) In the "Title" field, enter the attachment name.
- (7) In the "Description" field, enter a useful description to describe the attachment content and purpose.
- (8) In the "Category" dropdown menu, choose "From Supplier".
- (9) Click on the **"Browse"** button to locate the file to be uploaded.
- (10) Click on the "Apply" button to submit the changes.



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### 4.7.3. ADD ATTACHMENT

In the **"General"** screen, add new attachments to your profile as needed. Attachments can be documents pertinent to your relationship with CRC.

Search									
Note that the search is case insensiti	Ve								
Title		Go							
Show More Search Options									
and the state of t									
Add Attachment (1)									
	Туре	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalo
Title	<b>Type</b> File	Description	Category From Supplier	Last Updated By	Last Updated 09-Jun-2011	Usage One-Time	Update	Delete	Publish to Catalo
Add Attachment 1 Title Commercial Business Registration Attachment - Example 1	File	Description Attachment - Example 1		Last Updated By			-		Publish to Catalog

(1) Click on the "Add Attachment" button. The following screen will appear.

	_	_	_									
Home	Orders	Shipments	Negotiations	Finance	Product	Admin						
Profile	Managen	nent										
Add At	ttachment											
										Connect	add an other	A such a
-			_							Cancel	Add Another	Apply
Add	Desktop Fil	e/ Text/ URL	•									
Atta	chment S	ummary Infor	rmation									
							$\circ$					
			Title				(2)					
			Description					1				
								(3)				
								<b>T</b>				
			Category Fro	m Supplier	(4)							
					$\overline{}$							
Defin	e Attachi	ment										
		_										
		Туре 🔍	File				Browse.	5				
		0	URL					Г				
		0	Text				*					
		L					÷					0
												(6)
										Cancel	Add Another	Apply
												7

- (2) In the "Title" field, enter the attachment name.
- (3) In the "Description" field, enter a useful description to describe the attachment content and purpose.
- (4) In the "Category" dropdown, choose "From Supplier".
- (5) Select the **"Type"** radio button:
  - File: Click on the "Browse" button to locate the file to be uploaded.
  - URL: In the "URL" field, enter the URL address.
  - Text: In the "Text" field, enter the appropriate text.
- (6) Click on the "Apply" button to upload the attachment.

Note: Click on the "Add Another" button to repeat the process for additional attachments.



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### 4.7.4. VIEW AND UPDATE THE ORGANIZATION INFORMATION

In the **"Organization"** screen, enter high-level details about your company. To access the organization details, click on the **"Admin"** tab.

**IMPORTANT:** This information can be only entered or updated by the Supplier during the registration and qualification process using the responsibility, Supplier user – Registration.

Home Orders Shipn Profile Management	ents Negotiations Finance Product	Admin		
	Organization			
Company Profile     Organization     Address Book     Contact Directory     Product & Services     Banking Details     Payment & Invoicing	D-U-N-S Number Legal Structure Principal Name Year Established Incorporation Year Control Year Mission Statement	Chief Executive Name Chief Executive Title Principal Title	2	Cancel Save
	Total Employees			
	Organization Total Organization Total Type	Corporate Total Corporate Total Type	3	
	Tax and Financial Information			
	Taxpayer ID Tax Registration Num 1082/1 VAT Number. Fiscal Year End Federal Agen	Analysis Year Currency Preference Annual Revenue Potential Revenue For next fiscal year.	4	
				Cance! Save

#### **IMPORTANT:** Use capital letters to populate the fields.

- (1) Click on the "Organization" hyperlink in the "Profile Management" navigation panel.
- (2) In the **"Organization"** section view and enter your organization details. Populate fields as needed. The Legal Structure field cannot be modified.
- (3) In the "Total Employees" section view and enter your employee information. Populate all fields.
- (4) In the **"Tax and Financial Information"** section, enter the Tax Registration No., Tax ID., etc. Populate fields as needed.

Note: The Taxpayer ID field cannot be modified.



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### 4.7.5. VIEW THE ADDRESS BOOK

The **"Address Book"** screen provides information about your company's registered addresses for requesting information or quotations, ordering materials and services, and receiving payments.

Home	Orders	Shipments	Negotiations	Finance	Product	Admin			
Profile	Managem	ent							0
• Ge	eneral	Add	ess Book						(2)
• Co	ompany Pro	file Add	ress Name 🔺				Address Details	Country	Update
0	Organizatio	n DOH	A				101 MAIN ST	Qatar	/
0	Address E	lool 1					DOHA, QATAR		-
	Contact ctory								
	Product &								
Sen	/ices								
	Banking De								
	Payment & icing								
1100	licing								

- (1) Click on the **"Address Book"** hyperlink in the **"Profile Management"** navigation panel. The general information about the company's address will appear.
- (2) To view a detailed information about the company's address, click on the on the "**Pencil**" icon in the "**Update**" column. The following screen will appear.

**Note:** This is just an information screen; you will not be able to modify the information.

Admin: Profile Management: Addr	ess Book >								
Update Address									
* Indicates required field									
Personalize Stack Layout: (AddrDt									
	blier Name SUPPLIER TRAINING		Supplier Number	55041					
Personalize Flow Layout: (Separat	but: (SeparatorRN) dress Name DOHA * Country Qatar dress Line 1 01 MAIN ST dress Line 2 dress Line 3 dress Line 4								
* Address Name	DOHA		* Phone Area Code	+974					
* Country	Qatar	-	* Phone Number	434343434					
* Address Line 1	101 MAIN ST		Fax Area Code	+974					
Address Line 2			Fax Number	242343243					
Address Line 3			* Email Address	ADDRESS@TRAINING.COM					
Address Line 4	Address Line 4			✓ Purchasing Address					
* City/Town/Locality	Address Line 4 City/Town/Locality DOHA			Payment Address					
County				RFQ Only Address					
* State/Region	QATAR								
Province									
* Postal Code									
Note									
Note		*							
Include any additor	al details about the address such as the type of	of address. This will be visible to other buyers	s within your organization as well a	as to the supplier. Also, include brief notes to buyer about the change when changing address information.					



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### 4.7.6. VIEW THE CONTACT DIRECTORY

The **"Contact Directory"** screen provides information about your company's registered personnel and the iSupplier Portal users.

**IMPORTANT:** This information can be entered or updated by the Supplier during the registration and pre-qualification process using the responsibility: Supplier User - Registration. It also can be updated by the Supplier Security Administrator in your company at any time. See additional information in the <u>User</u> <u>Guide – Administrate Users – Security Administrator</u>

eneral	Contact Directo	ory : Active Contacts						
ompany Profile	First Name	Last Name	Phone Number	Email	Status	User Account	Addresses	Update
Organization	CONTACT	CONTACT	+1 555555666 4344	CONTACT@TRAINING.COM	Current	~		1
Address Book	CONTACT1	CONTACT1	+974 555555555	CONTACT1@TRAINING.COM	Current	~		1
Contact	CONTACT2	CONTACT2	+974 44444444	CONTACT2@TRAINING.COM	Current	~		1
Product & vices	- Contact Di	rectory : Inactive C	ontacts					
Banking Details	First Name	Last Name	Phone Number	Email		Status	User Ac	count
Payment & oicing	CONTACT3	CONTACT3	+974 333333333	CONTACT3@TRAINING.COM		Inactive		

- (1) Click on the **"Contact Directory"** hyperlink in the **"Profile Management"** navigation panel. The general information about the company's contacts will appear.
- (2) The "Active Contacts" section shows your active contacts key data.
  - See a contact's detail information by clicking on the "Pencil" icon in the "Update" column.
  - See a contact's addresses by clicking on the "Addresses" icon.
- (3) The "Inactive Contact" section shows any contacts that are inactive.

### 4.7.7. VIEW PRODUCTS AND SERVICES

The **"Products and Services"** screen provides information about your company's registered products and services according to CRC-selected UNSPSC (United Nations Standard Products and Services Code) codes and descriptions at the class level. For more information regarding UNSPSC codes, visit <u>www.unspsc.org</u>.

**IMPORTANT:** This information can be entered or updated by the Supplier during the registration and pre-qualification process using the responsibility, Supplier User - Registration. See additional information in the <u>User Guide – Respond to Request for Information (RFI)</u>.

Profile Management				
General	Produ	cts and Ser	rvices	
Company Profile Organization			None 3	
Address Book	Select		Products and Services	Date Added
Contact		22101800	Building and Construction Machinery and Accessories-Heavy construction machinery and equipment-Aerial lifts-	06-Jun-2011
Directory		71121810	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Electronic submersible pump lifting services	06-Jun-2011
Product &		71121812	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Gas lift Services	06-Jun-2011
Services		71121807	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Hydraulic lifting services	06-Jun-2011
<ul> <li>Banking Details</li> <li>Payment &amp;</li> </ul>		71121811	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Other lift systems	06-Jun-2011
Invoicing		71121805	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Plunger lift services	06-Jun-2011
		71121809	Mining and oil and gas services-Well drilling and construction services-Artificial lift services-Well site optimization and automation services	06-Jun-2011

- (1) In the "Profile Management" navigation panel, click on the "Products and Services" hyperlink.
- (2) The "Code" column shows Product or services with UNSPSC codes at the class level.
- (3) The **"Products and Services"** column shows Products or services with UNSPSC description at the class level (Segment Family Class Description).



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### 4.7.8. VIEW BANKING DETAILS

The **"Banking Details"** screen provides information about your company's bank accounts that your company has identified to be used by CRC to send electronic payments. Bank accounts can be associated with specific addresses. There are two recommended options to view bank accounts.

**IMPORTANT:** Banking accounts details can only be created and modified by CRC personnel based on verification of Supplier-provided information.

#### **Option 1:** View all Accounts.

Profile Management										
General     Company Profile	Banking Details View All Accounts	2	Go	3						
<ul> <li>Organization</li> <li>Address Book</li> </ul>	Account Number -	Status	Update	Currency	Account Name	Bank Name	Bank Number	Branch Name	Branch Number	Remov
<ul> <li>Contact</li> <li>Directory</li> </ul>	0000001111	Approved	1	Euro	TRAINING	INTERNATIONAL BANK OF QATAR		IBOQQAQA		R
<ul> <li>Product &amp; Services</li> </ul>	0000011222	Approved		Pound Sterling	TRAINING 2	INTERNATIONAL BANK OF QATAR		IBOQQAQA		R
Banking 1		Approved	1	Qatari Rial	the same "raining and	INTERNATIONAL BANK OF QATAR		IBOQQAQA		R
Payment &     Invoicing		Approved	1	US Dollar	Comparison (Comparison)	INTERNATIONAL BANK OF QATAR		IBOQQAQA		R

(1) In the "Profile Management" navigation panel, click on the "Banking Details" hyperlink.

(2) In the "View" dropdown menu, select "All Accounts".
 Note: If "General Accounts" is selected in the "View" field, bank accounts without any associated addresses will be shown.

- (3) Click on the "Go" button. The primary data for all bank accounts will be shown.
- (4) To view details about a specific bank account, identify the account and click on the "**Pencil**" icon in the "**Update**" column. The following screen will appear.



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	Country Qatar	
	Country Qatar Account is used for foreign Account cerhiton must induce ban	n payments
Bank	Account centrition must include ban	Branch Information.
Personalize "Bank." ⊐) <u>Hide Bank Details</u> Details	Bank Name INTERNATIONAL BANK OF QATAR Bank Number	5 Personalize "Branch Y Branch Number BCC 1B0QQAQA Branch Yver BCC 1B0QQAQA
Personalize "Details"	Alternate Bank Name	Ottails     Details     Personalse "Details     Alternate Branch Name
Address Personalize "Address"	Address Line 1 Address Line 2	RFC Identifier Address
	Address Line 3 Address Line 4 CRy State Zp: Code	6 Personalize "Address Line 1 Address Line 2 Address Line 3 Address Line 3 Address Line 4 City State Zop Code
Bank Account		
Personalize "Bank Account"	Account Number 0000001111 Check Digits IBAN	Account Name TRAINING Currency: Euro Account Status Approved
Personalize "Details"	Alternate Account Name Account Suffic Agency Location Code	Account Type Description End Date (exempt: 21-Jun-2012)
Comments Personalize "Comments"		
	te from Buyer None	

- (5) The "Bank" section shows bank's detailed information.
- (6) The "Address" section shows bank's address.
- (7) The "Branch" section shows detailed information about the bank's branch.
- (8) The "Address" section shows detailed information about the bank branch's address.
- (9) The "Bank Account" section shows detailed information about the bank account.

**Option 2:** View the bank accounts associated with a specific address

<ul> <li>rofile Manageme</li> <li>General</li> </ul>	Admin: Profile Manager	ment: Banking Detai	ls >						
Company Profil Organization	Banking Details           View         All Assignments	(1) ; - Go (	2)						
<ul> <li>Address Bool</li> </ul>	Details Type 🔻	Name		Details					Assignments
<ul> <li>Contact</li> <li>Directory</li> </ul>	Hide General	SUPPLIER TRAININ	NG	General accou	nts used at all supp	olier addresses.			
<ul> <li>Product &amp; Services</li> <li>Banking</li> </ul>	Account Number No results found.	Account N	ame IBAN	Currency	Bank Name	Start Date	End Date	Priority	
Details	Hide Address	DOHA		101 MAIN ST,	DOHA,QATAR,Qata	r			
Invoicing	Account Number No results found.	Account N	ame IBAN	Currency	Bank Name	Start Date	End Date	Priority	

- In the "View" dropdown menu, select "All Assignments".
   Note: If "General Accounts" is selected in the "View" field, bank accounts without any associated addresses will be shown.
- (2) Click on the "Go" button. All addresses and associated bank accounts will be shown.



User Guide – Overview to Access, Passwords, Navigation and Notifications

Version 1.0 December 1, 2014

### 4.7.9. VIEW PAYMENTS AND INVOICING PREFERENCES

The **"Payment and Invoicing"** screen provides information about your company's payment and invoicing. Please note that invoices and payments will be processed according to the specific purchasing document terms and conditions.

**IMPORTANT:** This information can be entered or updated by the Supplier during the registration and qualification process using the responsibility Supplier User - Registration.

Home Orders Ship Profile Management	ments Negotiations Finance Product Adm	in <b>e</b>	
General     Company Profile     Organization     Advress Book     Contact Directory     Product & Services     Banking Details     Payment & Invoicing     1	Payment and Invoicing  Hold all Payments Hold Unmatched Invoices		Involce Amount Limit Payment Hold Reason
	Search Note that the search is case insensitive Address Name %	Go Clear	2
	Address Name DOHA 3 Address Details 101 MAIN ST, DOHA, QATAR, Qatar	Payment Method Payroll Tax Recording Only	Preferences Payment Currency US Dollar • 4 5 6 10voice Currency US Dollar • 6 7 10voice Currency Invoice Cure

- (1) In the **"Profile Management"** navigation panel, click on the **"Payment & Invoicing"** hyperlink.
- (2) The "Search" section allows you to search information about your company's payment and invoicing preferences. Search by entering the address name in the "Address Name" field and clicking on the "Go" button for access to the preferences related to that specific address. Note: Use "%" to access all addresses.
- (3) The "Address Name" column shows the list of addresses. The payment and invoicing preferences is established for each address.
- (4) The **"Payment Method"** column shows the method for payment. The different methods are shown below.

Payment Method	Description	
CRC ZZZ	Payment made by international banks by CRC's international operating units	
CRC CHECK	Paper check to be sent via mail	
CRC EFT (Int'l local banks)	Payment made from local bank by CRC's international operating units	
CRC ACH	Electronic payments from a US bank to a US bank	
CRC RECORDING ONLY	For CRC's internal use only	
CRC CWT	Foreign currency electronic payments from a US bank	
CRC FWT	US Dollar electronic payments from a US bank	

- (5) The **"Payment Currency"** column shows the established currency for payments billed to the current address.
- (6) The "Invoice Currency" column shows the established currency for invoices billed to the current address.
- (7) The "Notification Method" column shows the method to receive the notifications (i.e.: by email, fax, print or none)