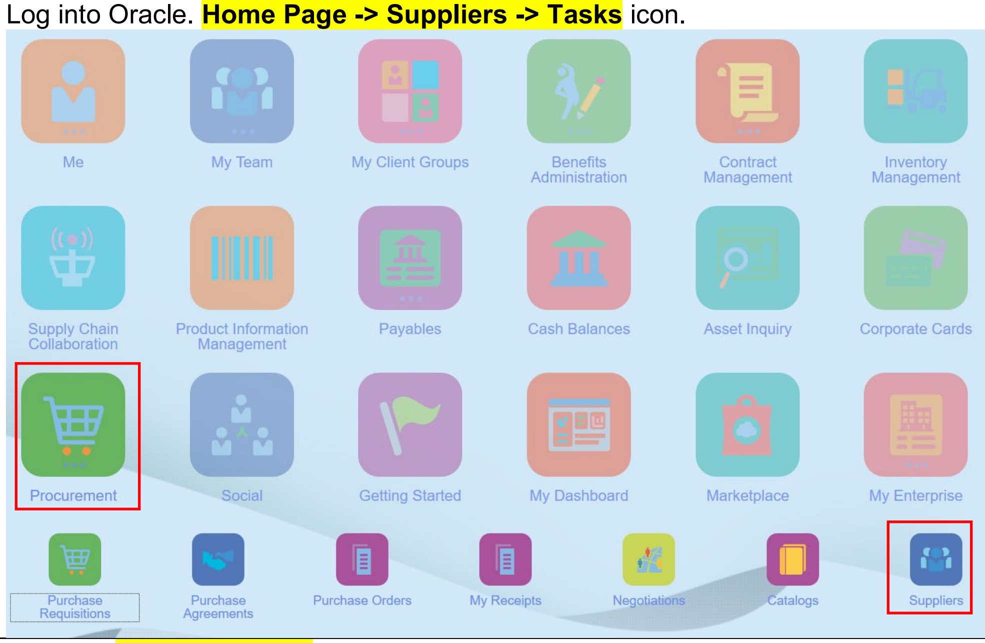
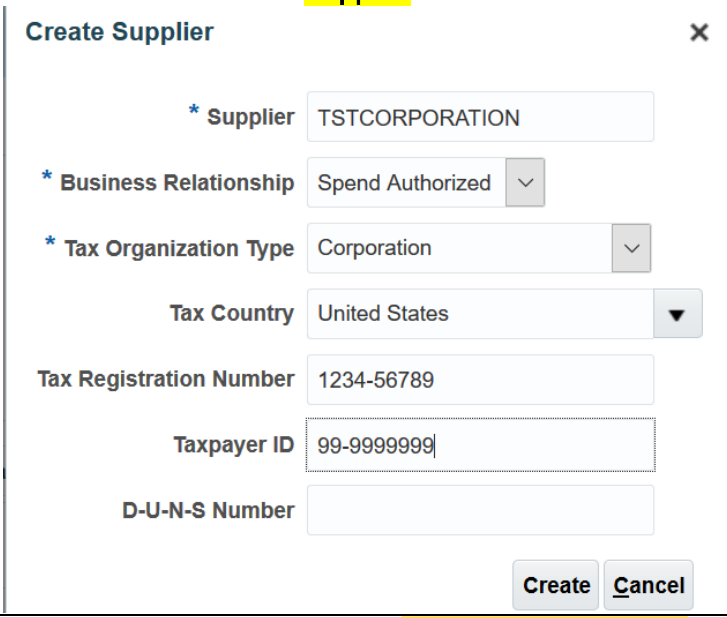
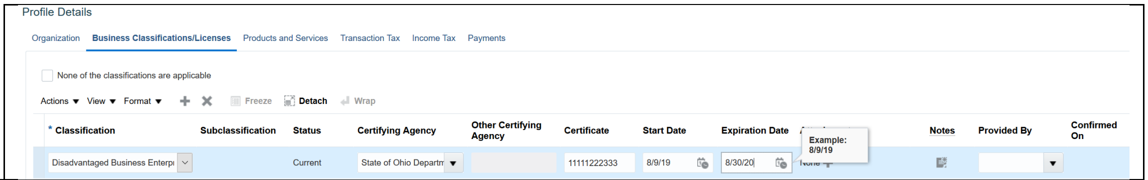
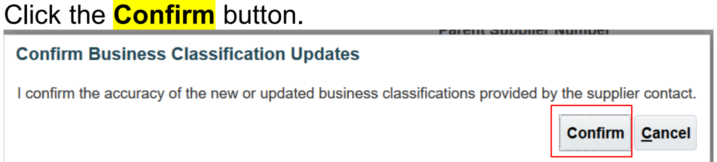
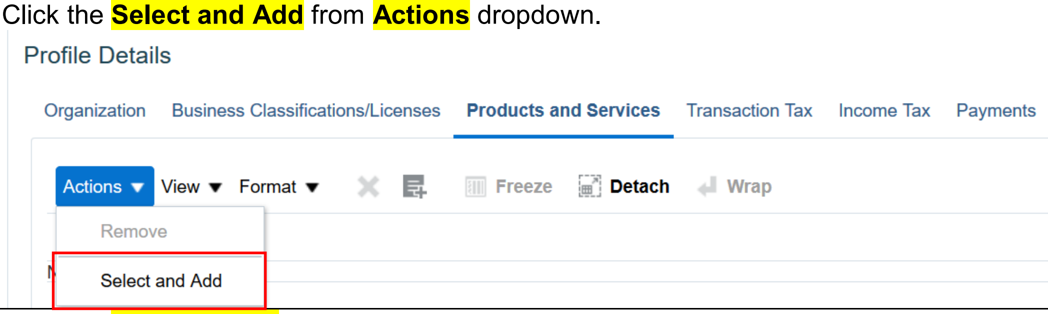
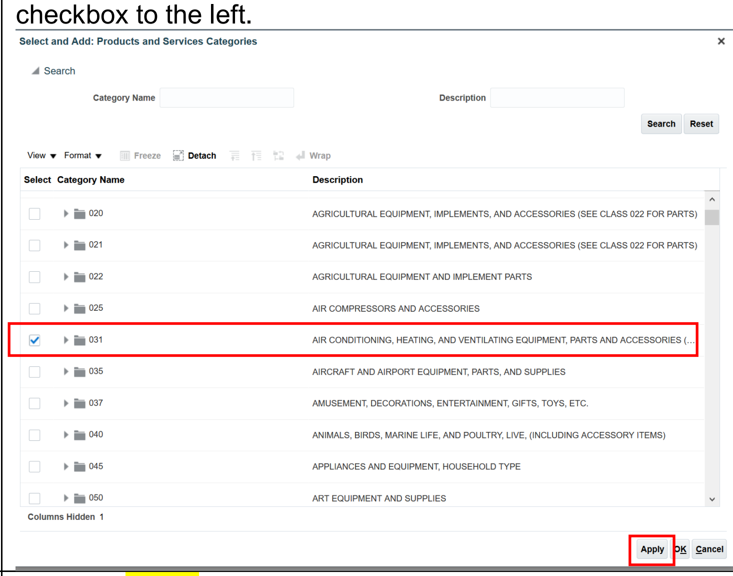
Create Supplier – Internal Screens

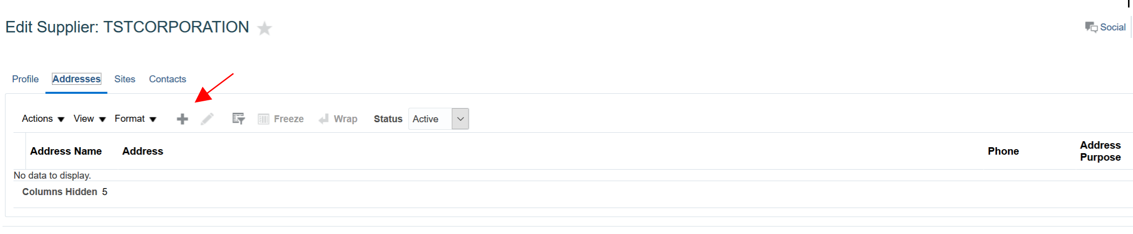
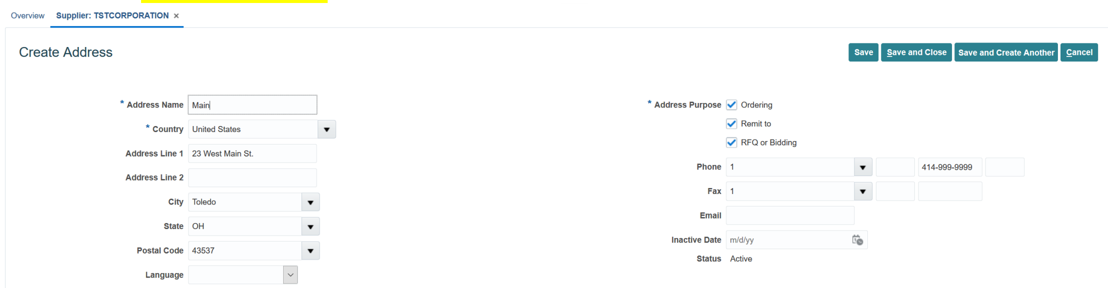
Audience: Supplier Administrator

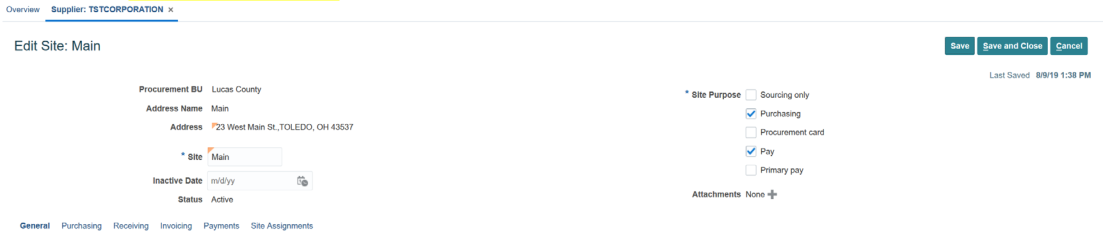
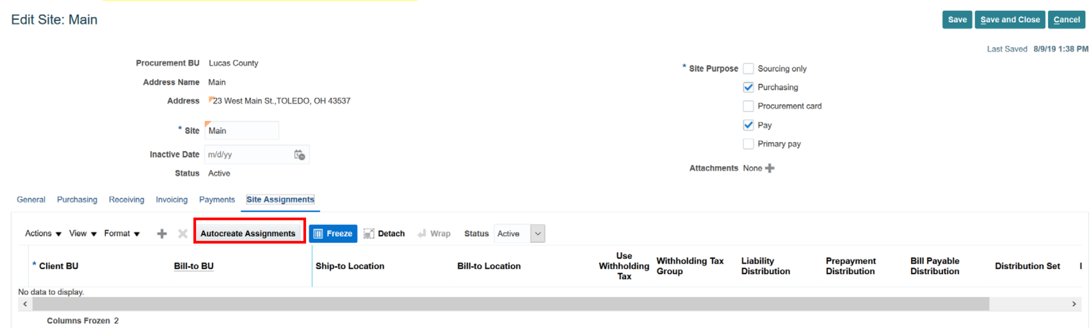
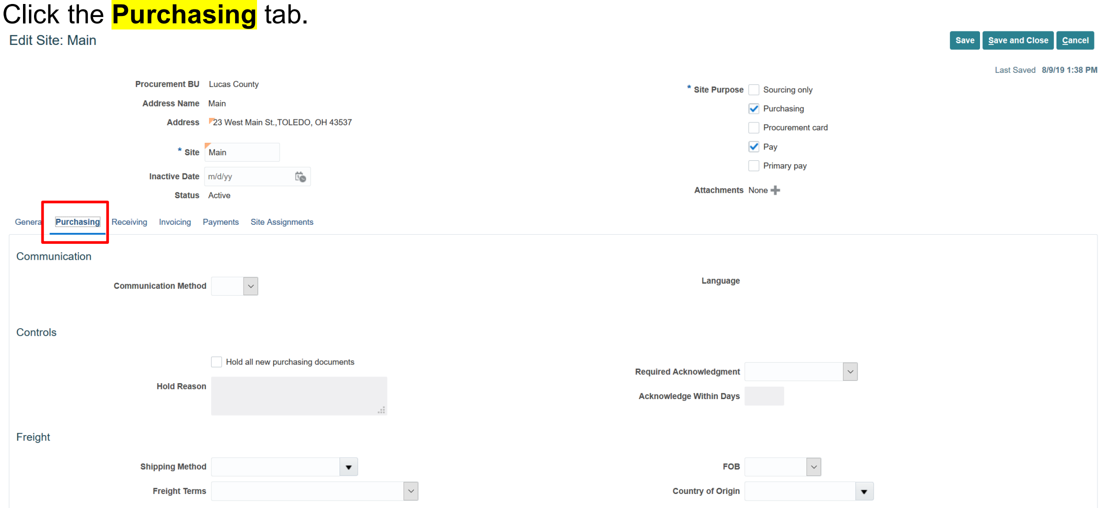
Purpose: Creating suppliers and supplier sites is an essential part of the procurement process. A supplier is modeled as a global entity. It is not created within a business unit or any other organizational context. A procurement business unit establishes a relationship with a supplier through the creation of a site which maintains internal controls for how to procure to pay transactions are executed with the supplier. This job aid walks you through the process of Creating a New Suppler and Supplier Site.

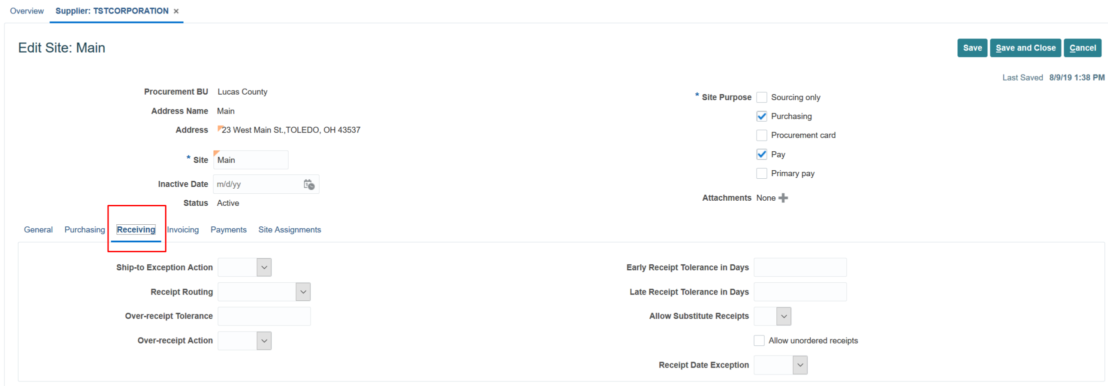
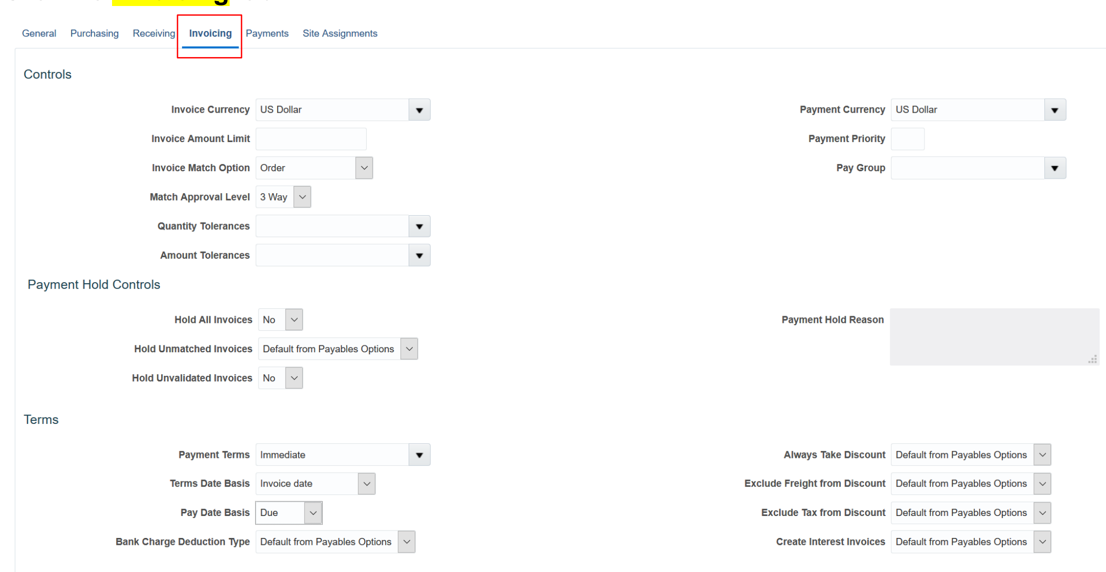
Step	Action
1	Log into Oracle. **Home Page -> Suppliers -> Tasks** icon. 
2	Click the **Create Supplier** link. 
3	Click in the **Supplier** field.

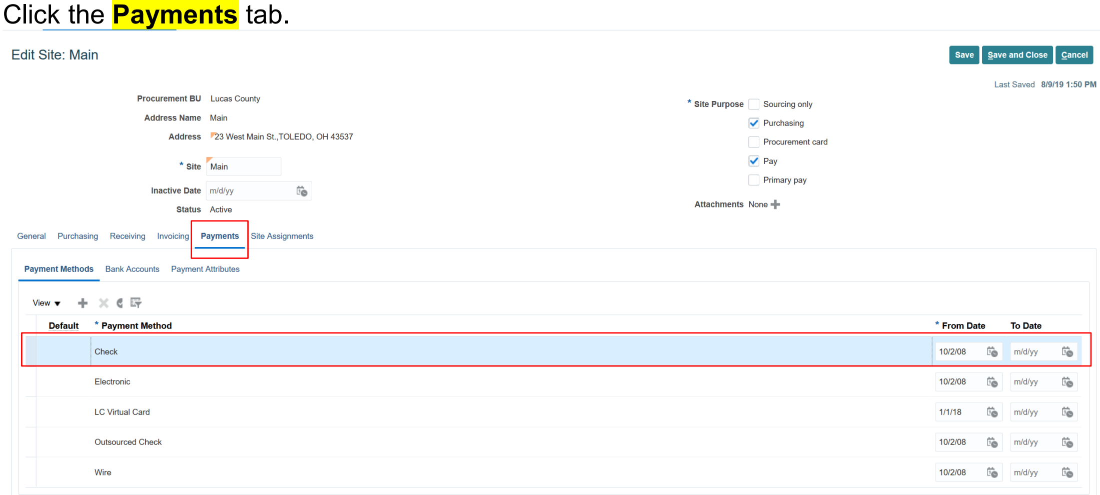
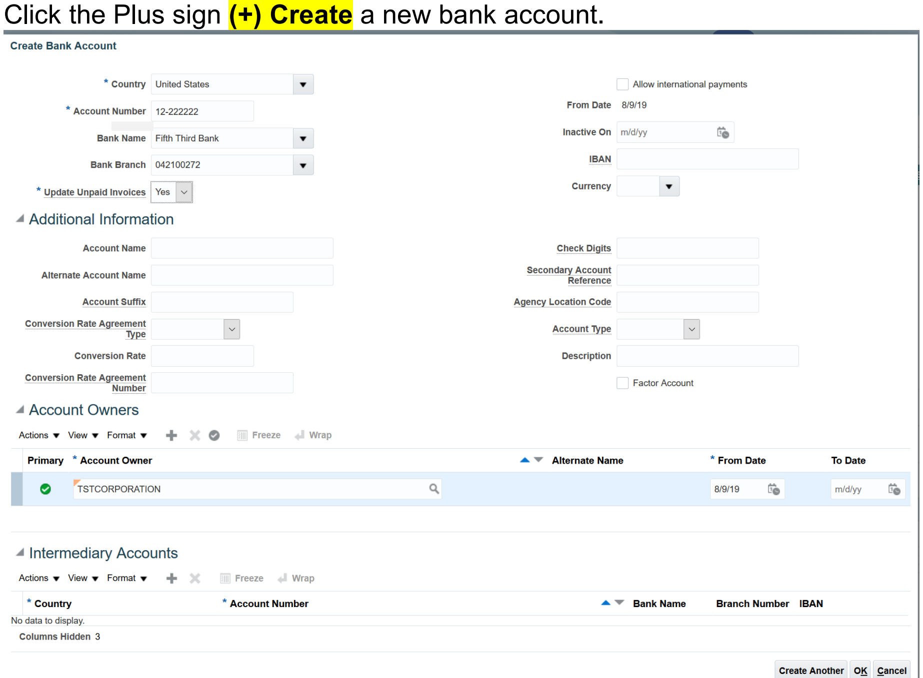
4	The Supplier name must be unique. For this example, enter your initials (XXX) followed by CORPORATION into the **Supplier** field. 
5	Click the dropdown arrow to view **Business Relationship** list.
6	Select the **Spend Authorized** item.
7	Click the dropdown arrow to view **Tax Organization Type** list.
8	Select **Corporation** from the list.
9	Click in the **Tax Country** field.
10	Enter information into the **Tax Country** field.
11	Select the **United States US** from the list.
12	Click in the **Taxpayer ID** field. Taxpayer ID is unique to each Supplier and will be entered here. For this example, enter any combination of numbers into the **Taxpayer ID** field.
13	Click the **Create** button.
14	Click the dropdown arrow to view the **Supplier Type** list.
15	Click **Supplier** in this list.
16	Under the **Profile Details**, click the **Business Classifications** tab.
17	Click the **Add** Icon.
18	Click the **Classification** list.
19	Select a **Classification** from this list.
20	Click in the **Certifying Agency** field.
21	Click the **Certifying Agency** list.
22	Select a **Certifying Agency** license from the list.
23	Click in the **Certificate** field.
24	Enter information into the **Certificate** field.
25	Click the **Start Date** button and add a start date.
26	Click the **Expiration Date** button and add an expiration date.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>27</td><td>Click Attachment icon.</td></tr>
<tr><td>28</td><td>Select Type as File.</td></tr>
<tr><td>29</td><td>Select Category as From Supplier.</td></tr>
<tr><td>30</td><td>Click Browse, select File and click Open.</td></tr>
<tr><td>31</td><td>Update Title, optionally.</td></tr>
<tr><td>32</td><td>Enter Description, optionally.</td></tr>
<tr><td>33</td><td>Click the OK button.</td></tr>
<tr><td>34</td><td>Click the Save button.</td></tr>
<tr><td>35</td><td>Click the Confirm button.

</td></tr>
<tr><td>36</td><td>In the Profiles Details Region, click the Products and Services tab.</td></tr>
<tr><td>37</td><td>Click the Select and Add from Actions dropdown.

</td></tr>
<tr><td>38</td><td>Click the Select option checkbox. Choose as many categories as needed by clicking on the checkbox to the left.

</td></tr>
<tr><td>39</td><td>Click the Apply button.</td></tr>
<tr><td>40</td><td>Click the OK button.</td></tr>
</table>

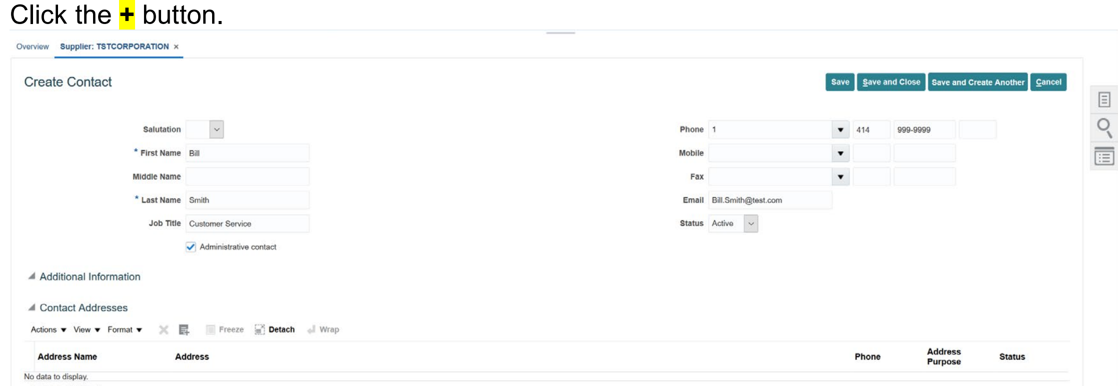
41	Click the **Save** button.
42	Click the **Addresses** tab.
43	Click the **Create + icon.** 
44	Click in the **Address Name** field. 
45	Enter information into the **Address Name** field.
46	Click in the **Country** field.
47	Enter information into the **Country** field.
48	Select **United States US** from the list.
49	Click in the **Address Line 1** field.
50	Enter information into the **Address Line 1** field.
51	Enter **City**.
52	Click in the **Postal Code** field.
53	Enter information into the **Postal Code** field.
54	Click in the **Phone Area Code Field.**
55	Enter information into the **Phone Area Code** field.
56	Click in the **Phone** field.
57	Enter information into the **Phone** field.
58	Click **Phone Extension** field.
59	Enter information into the **Phone Extension** field.
60	Click in the **Email** field.
61	Click the **Ordering** option.
62	Click the **Remit To** option.
63	Click the **Save and Close** button.
64	Click the **OK** button.
65	Click the **Sites** link.
66	Click the **+** icon.
67	Click in the **Address Name** field.
68	Click to select an address name from the **Address Name** list.

69	Select the **Procurement BU** in the list if it is not already selected. 
70	Click the **Save** button.
71	Click the **Site Assignments** tab.
72	Click the **Autocreate Assignments** tab. 
79	Click the **Save** button.
80	Click the **Purchasing** tab. 
81	Click the **Communication Method** list.
82	Select the **Email** from the list.
83	Click in the **Email** field.
84	Enter information into the **Email** field.
85	Email Addresses must be unique.
86	Click in the **Shipping Method** field.
87	Click the **Shipping Method** list.
88	Select the **Lowest Cost Carrier** from the list.
89	Click the **Freight Terms** list.
90	Select the **None** from the list.
91	Click the **FOB** list.
92	Select the **None** from the list.

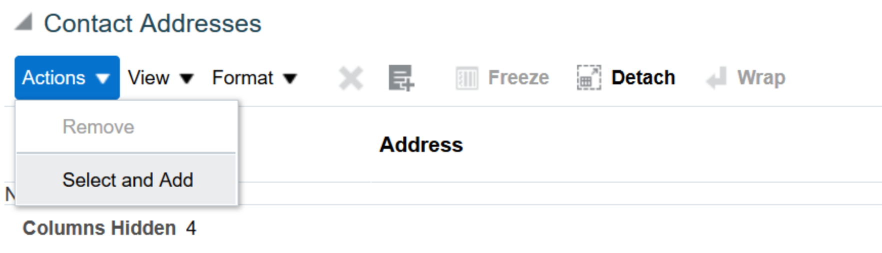
<table>
<tr><td>93</td><td>Click the Save button.</td></tr>
<tr><td>94</td><td>Click the Receiving tab.

</td></tr>
<tr><td>95</td><td>Click the Receipt Routing list.</td></tr>
<tr><td>96</td><td>Select the Direct delivery from the list.</td></tr>
<tr><td>97</td><td>Click the Save button.</td></tr>
<tr><td>98</td><td>Click the Invoicing tab.

</td></tr>
<tr><td>99</td><td>Click in the Invoice Currency field.</td></tr>
<tr><td>100</td><td>Enter information into the Invoice Currency field.</td></tr>
<tr><td>101</td><td>Select the USD US Dollar from the list.</td></tr>
<tr><td>102</td><td>Click in the Payment Currency field.</td></tr>
<tr><td>103</td><td>Enter information into the Payment Currency field.</td></tr>
<tr><td>104</td><td>Select the USD US Dollar from the list.</td></tr>
<tr><td>105</td><td>Click the Invoice Match Option list.</td></tr>
<tr><td>106</td><td>Select the Order from the list.</td></tr>
<tr><td>107</td><td>Click the Match Approval Level list.</td></tr>
<tr><td>108</td><td>Select the 3 Way from the list.</td></tr>
<tr><td>109</td><td>Click in the Payment Terms Field.</td></tr>
<tr><td>110</td><td>Using the dropdown arrow, click the Payment Terms list.</td></tr>
<tr><td>111</td><td>Select the Immediate from the list.</td></tr>
<tr><td>112</td><td>Click the Terms Date Basis list.</td></tr>
</table>

113	Select the **Invoice date** from the list.
114	Click the **Pay Date Basis** list.
115	Select the **Due** from the list.
116	Click the **Save** button.
117	Click the **Payments** tab. 
118	Click the **Check** row.
119	Click the **Default (Checkmark)** button. 
120	Click the **Bank Accounts** tab.
121	Click the Plus sign **(+) Create** a new bank account. 
122	Click in the **Country** field.
123	Enter information into the **Country** field.
124	Select the **United States US** from the list.

125	Click in the **Account Number** field.
126	Enter information into the **Account Number** field.
127	Click in the **Bank Name** field.
128	Click the **Bank Name** list.
129	Select the **Bank** from the list.
130	Click in the **Branch** field.
131	Click the **Branch** list and select Branch.
132	Click **Update Unpaid Invoices** and select Yes
133	Click the **Save and Close** button.
134	Click the **OK** button.
135	Click the **Save and Close** button.
136	Click the **OK** button.
137	Click the **Contacts** tab.
138	Click the **+** button.



139	Click in the **First Name** field.
140	Enter information into the **First Name** field.
141	Click in the **Last Name** field.
142	Enter information into the **Last Name** field.
143	Click in the **E-Mail** field.
144	Enter information into the **E-Mail** field.
145	Click the **Save** button.
146	Click the **Administrative Contact Option** checkbox.
147	Click in the **Phone Country Code** field.
148	Enter information into the **Phone Country Code** field.
149	Click the **Phone Country Code** list.
150	Click the **Search** link.
151	Click in the **Phone Country Code** field.
152	Click the **Search** button.
153	Scroll down and Select **1** and **United States.**
154	Click the **OK** button.
155	Click in the **Phone Area Code Field.**
156	Enter information into the **Phone Area Code** field.
157	Click in the **Phone Field**.
158	Enter information into the **Phone** field.
159	Click the **Save** button.
160	Click the **Create User Account Option** checkbox.
161	Click the **Save** button.

169	Under Contact Addresses Click the **Select and Add** button from **Actions** dropdown list. 
170	Click the required **Name** row.
171	Click the **Apply** button.
172	Click the **OK** button.
173	Click the **Save and Close** button.
174	Click the **OK** button.