JEA iSupplier Portal

User Guide

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Introduction

JEA has launched iSupplier Portal to facilitate Supplier participation and increased levels of Communication between JEA and our Suppliers. The overall benefit of this collaboration effort can be summarized as follows:

- Improved communication between JEA and Suppliers
- Best practices will be shared between JEA and Suppliers
- Error reduction and time savings for both JEA and Suppliers
- Better responsiveness - supply chain can react with improved response time and agility to manage unexpected situations
- Continuity of supply can be ensured with greater visibility into Orders, Delivery Schedules and Forecast Schedules
- Increased stability in supply chain due to readily available information
- Increased supply chain flexibility due to closer collaboration between Suppliers and JEA

JEA iSupplier Portal: JEA iSupplier Portal is a tool that enables real time collaboration between Suppliers and JEA. iSupplier will provide greater visibility into the JEA Procure-to-Pay process for our Suppliers.

Suppliers (Planners/CSR's) can easily access the system from their office or any location with a PC and internet connectivity. Suppliers can quickly collect JEA order information or respond to an acknowledgement, download the latest delivery schedules, update their profiles using this simple and user friendly tool that eliminates the need for the Supplier to have an IT support infrastructure for collaborating with JEA.

Please read through this user guide to gain a better understanding of the JEA iSupplier Portal and the different ways to retrieve, update, and upload information through the Portal. Please note that this document will be updated as we enhance and roll out more functionality in the iSupplier Portal, so make sure you are using the latest version of the document at all times.

It is important that you always have the latest version of the JEA iSupplier Portal External User Guide.

The latest version will be available on the JEA website:

http://www.jea.com/procurement/supplier-information/isupplier

Also the JEA Supplier Manuals can be found at:

http://www.jea.com/procurement/supplier-information/supplier-manuals

Supplier Help & Support

The first level of contact for the Supplier User is the JEA iSupplier Administration Team Helpdesk and the contact details are as follows:

Phone: 1-904-665-8625

Support will be available from 9:00AM to 4:00PM US EST.

After hours callers can leave a voice mail message and your call will be returned on the next business day.

Email: isupplier@jea.com

The helpdesk e-mail is another option for the Supplier to request support. The Supplier can send in a screenshot of a particular problem or issue along with a brief description of the issue and the user's contact details. This is a very effective method if the user is finding it difficult to describe a problem.

System Requirements

Recommended Operating System: Windows XP or higher. Mac OS 10.7.5 or higher.

Browser Requirements: Internet Explorer version 8 or Above.

Pop-up Blocker: Please ensure that your pop-up blocker is turned off and pop-ups are enabled for the JEA iSupplier Portal.

Excel/Microsoft Office: JEA recommends Microsoft Excel 2010.

*** Please note that all MS Office versions should be compatible with file exports. It is also possible that other spreadsheet based software applications can be used to sort/manipulate data exported from the Portal, however only Excel is supported by the JEA helpdesk.*

E-Mail Spam Filters: Please ensure JEA Workflow Mailer (wfmmailer_fipr12@jea.com) is enabled as a trusted sender. This is the e-mail address from which JEA system communications will be sent.

Important Note: As the iSupplier Portal is web based, standard browser functionality will be active. Please note that users should not use the forward and back browser arrows to navigate between pages. Please use the quick links and tabs within the portal to advance from one page to another.

Key Terminologies

ASN: Advanced Shipment Notice.

Buyer: Commodity Buyer at JEA who is listed as 'Buyer' on the iSupplier Portal. The Buyer is the person at JEA who handles Purchase Order Creation, Purchase Agreement Creation, Pricing Negotiation's, Purchasing and Payment Terms, as well as Procurement set-ups. The Buyer is not generally involved in the day to day activities of planning the item, placing Purchase Orders, or publishing Forecast Schedules – this would be the Material Planner at JEA.

Delivery Schedule: Listing of all shipments which need to be delivered to JEA. Instead of looking at individual PO's, Suppliers can access a complete summary of orders due at JEA by viewing delivery schedules.

Due Date (on Purchasing Documents): This is the date the material is due at JEA. The Due Date is the same as the Promised Date and if a Promised Date is vacant (not populated on a purchase order), the due date will be the Need by Date.

Due Date (on Invoices): This is the Payment Due Date based on the Payment Terms agreed with the Supplier.

EBS: E-Business Suite.

ERP: Enterprise Resource Planning.

Need By Date: Date by which the material is needed at JEA. JEA requires all material to be delivered to JEA within a 5 day window - on or up to 5 days before the Need by Date. Delivering material after the Need by Date is not acceptable, and if a Supplier is unable to meet the Need by Date please contact JEA immediately.

Over Due: Same as Past Due – see below.

Past Due: Deliveries which exceed the Due Date defined on the Purchase Order.

Planner: Material Planner at JEA. This is the person at JEA who handles the day to day activities of reviewing requirements, placing orders, verifying inventory, and publishing forecasts to the Supply-base. This person is the liaison between the Supplier and the JEA Production Scheduling Group. The Supplier should contact the Planner (not the Buyer) in the event the Supplier cannot meet a Delivery Schedule on time, as this information is critical to Production Scheduling/Planning.

PO: Purchase Order.

Promised Date: Date by which the Supplier promises to deliver the material. By default the Promised Date will be the same as the Need by Date.

Rev: Purchase Order revision level. This is not to be confused with the JEA Item revision level that appears on the .pdf copy of the PO. The default revision level for a PO is 0 and will increment up by 1 each time the PO is updated.

RFQ: Request for Quote.

Supplier Setup Requirements

The following criteria will be followed when creating Supplier Users in JEA iSupplier Portal

1. JEA iSupplier Administration Team can recommend Suppliers to be given access to the JEA iSupplier Portal.

2. Suppliers can also contact their buyers and request access to the iSupplier Portal. However, this will go through the JEA approval process before access is granted.

3. Number of Supplier Users per Supplier: Ideally there should be a limited number of Supplier Users. However, in cases where Suppliers have multiple CSR's or other personnel assigned to JEA, requests for multiple User ID's will be reviewed by the JEA iSupplier Administration Team. These requests are subject to approval and the new user will be created with a different User ID and access restrictions, if applicable.

4. User ID: The User ID will be the e-mail address of the Supplier contact as entered by the Buyer submitting the iSupplier User Creation Request Form. **The e-mail address will be used as the User ID, as well as the e-mail to which communications will be sent and must be a Supplier corporate e-mail address. JEA iSupplier Portal will not support other e-mail addresses due to security reasons.

Key Features of JEA iSupplier Portal

Suppliers who are registered with access to use the JEA iSupplier Portal will have the ability to:

- Acknowledge/Accept Purchase Orders
- Review Purchase Orders, Receipts, Purchase Order History
- Request specific changes to existing open Purchase Orders
- Create Invoices against Purchase Orders you receive from JEA
- See when your Invoices are scheduled to be paid
- Create Advance Shipment Notices
- Update your Address, Bank Details and other information directly within the tool

Registering for Access to JEA iSupplier Portal

Before you can access the JEA iSupplier Portal, you must be:

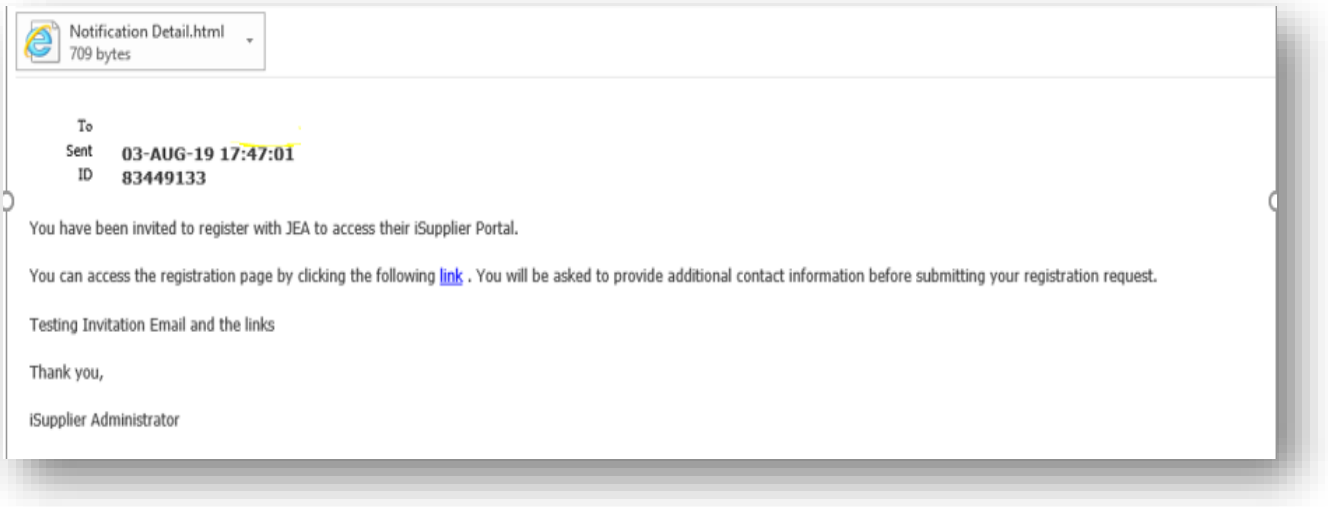
- An existing Supplier with JEA.
- Registered as a JEA iSupplier Portal user.

To access the portal, you need to complete an iSupplier Portal Registration form. If you require an access form, please contact the JEA iSupplier Administration Team at isupplier@jea.com.

The JEA iSupplier Administration Team will send out an invitation based on the email received from the Supplier.

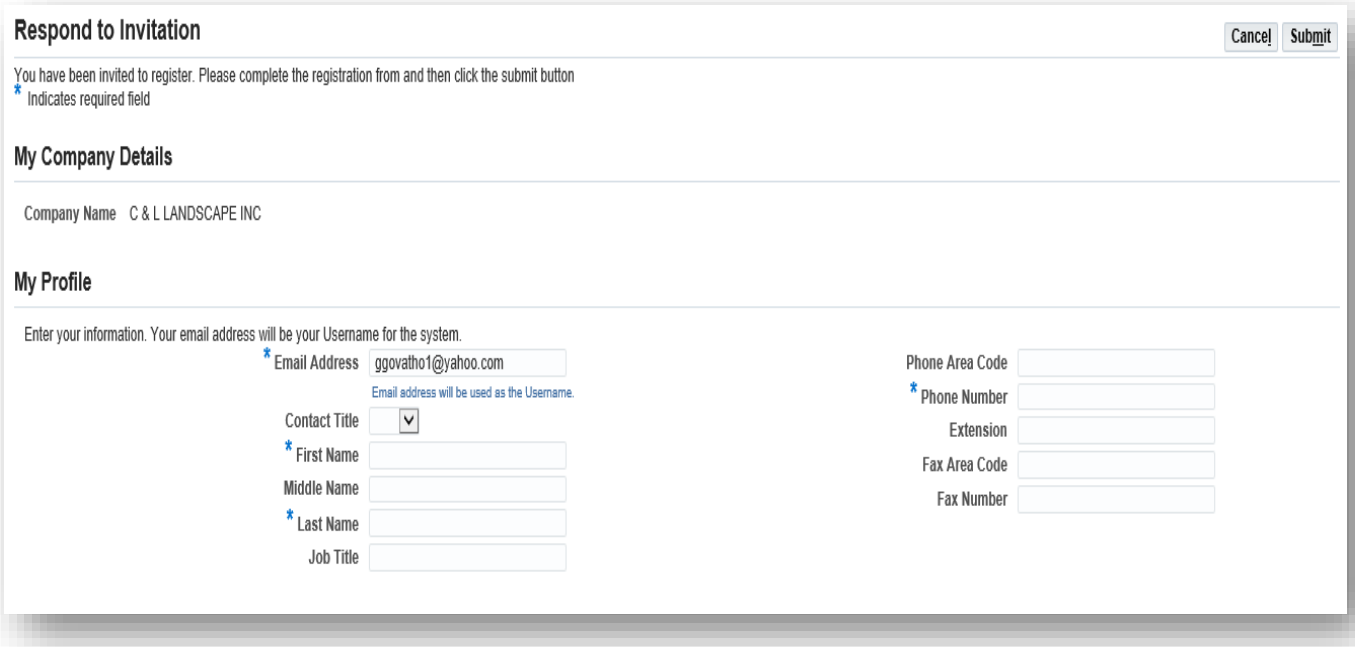
The Supplier will receive an email with additional information that is required to complete the registration.

The Email will look as listed below:



Supplier can click on the LINK within the email.

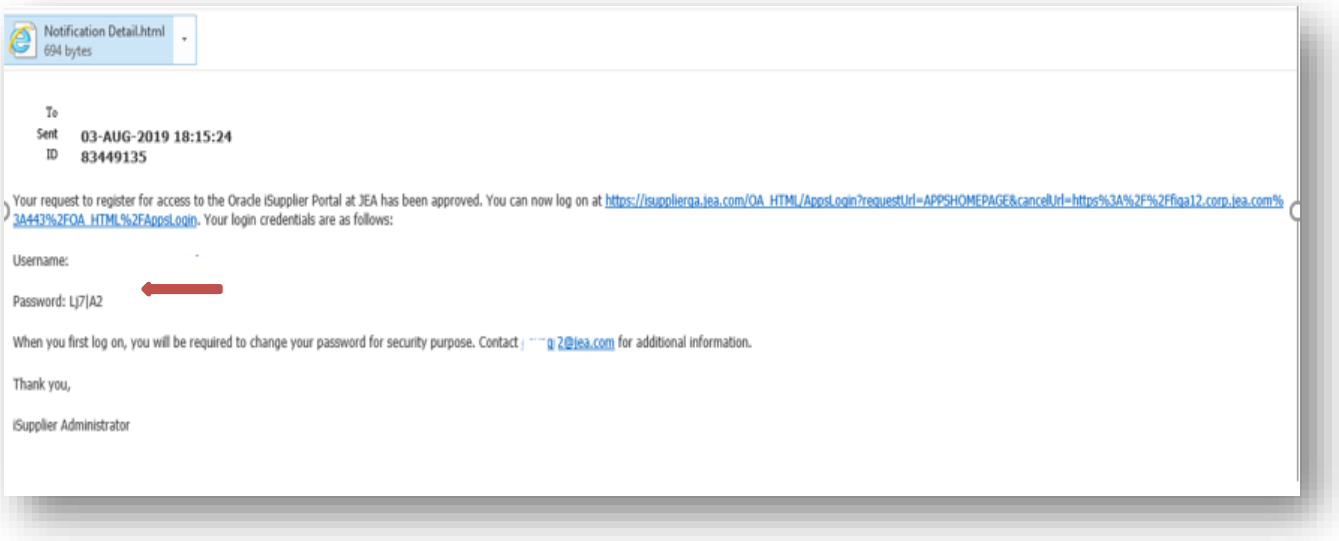
The Supplier needs to populate all of the fields. Every field with an asterisk "*" is a required field that needs to be populated with a value. Once the fields are complete, click Submit.



This will enable the JEA iSupplier Administration Team to complete the registration process and provide access to the Supplier User.

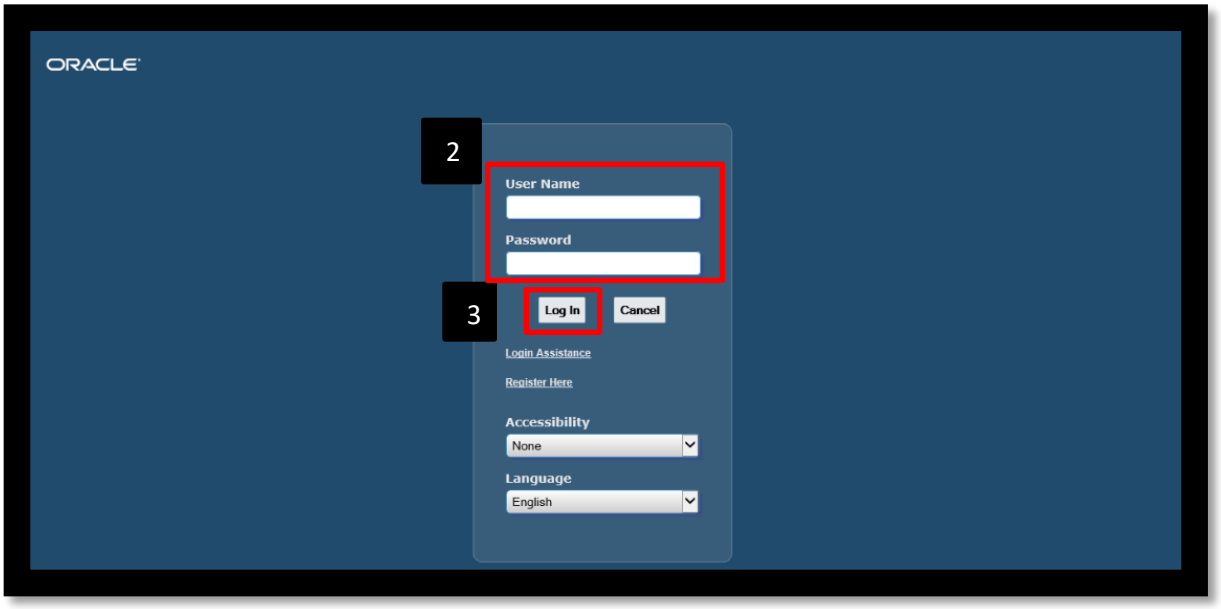
Supplier User will receive an email with the login URL, username and password (Screen shot listed below).

The login URL will also be available at JEA's Website under the Procurement - iSupplier tab.



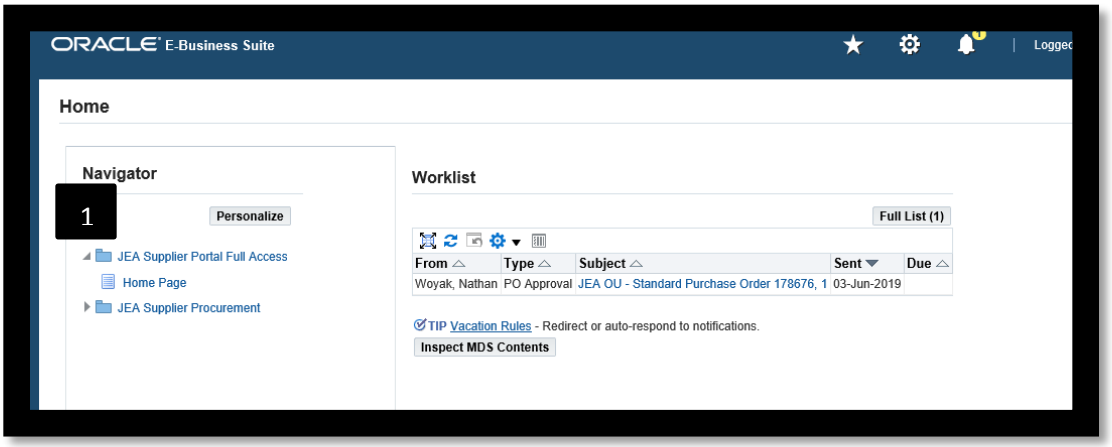
Navigating to JEA iSupplier Portal

1. Access the JEA iSupplier Portal Login page using the following url: https://isupplier.jea.com
2. Enter your username and password credentials that were previously provided to you.
3. Click the login button and the Oracle Applications homepage will be displayed.



JEA iSupplier Portal Responsibilities

After logging into the Oracle Applications Homepage you will see the following:



1. You will need to choose the appropriate responsibility from the list on the left side of the screen beneath **Navigator**.

What is a responsibility?

A responsibility is a level of authority within the JEA iSupplier Portal (and other Oracle applications) that lets users access only those JEA iSupplier Portal functions and data appropriate to their roles in an organization. Each responsibility allows access to specific tasks and functions. Below you will find a description of each JEA iSupplier Portal Responsibility that is available.

Note: JEA iSupplier Portal responsibilities will be assigned based on the needs of each supplier and the roles of those accessing the portal.

Description of each Responsibility

JEA Supplier Profile Manager - Used to give authorized supplier users access to their profile details. Users can update profile details, including contact information.

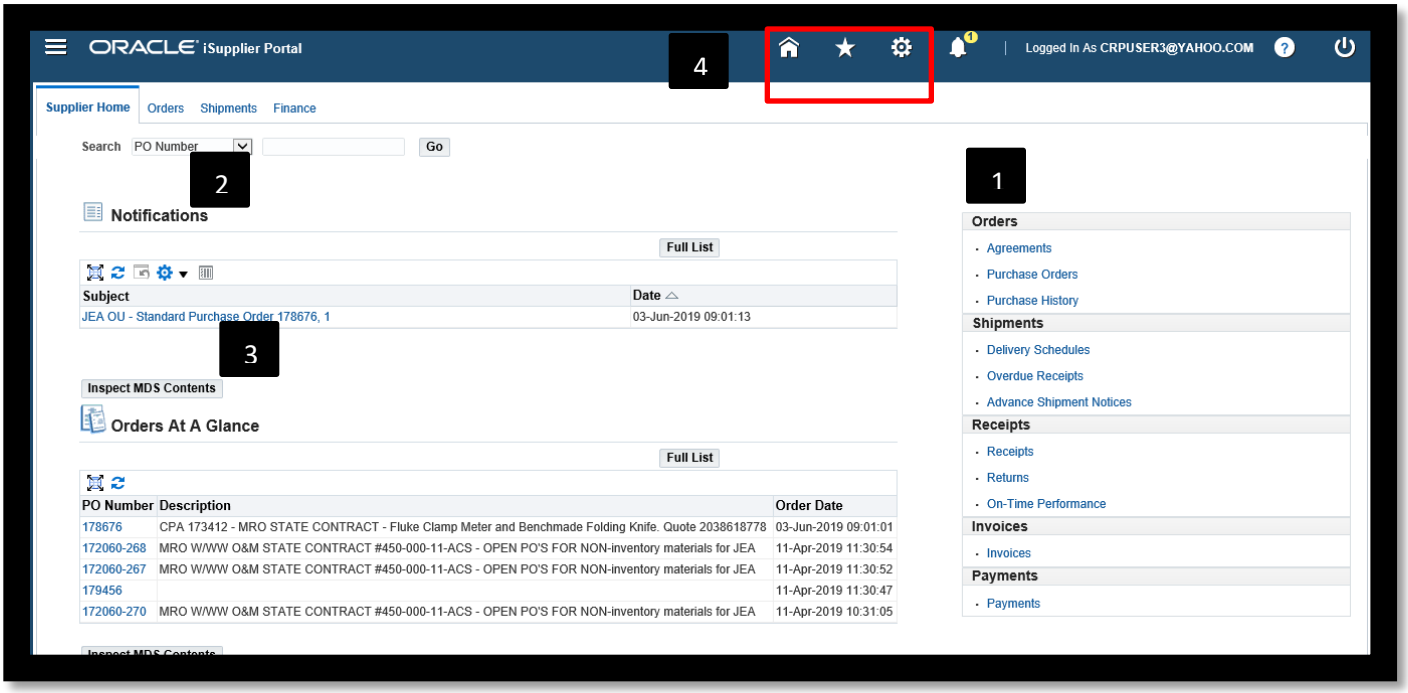
JEA Supplier Profile: Banking - Used to give authorized supplier users access to their profile details. Users can update profile details only in the Bank Details section.

JEA Supplier Payables - This responsibility provides access to the **Finance** tab and various query only access related to **Orders**.

JEA Supplier Portal: Inquiry - This is a view only responsibility.

JEA Supplier Portal Full Access - This responsibility has access to Procurement, Finance and Receiving/ASN functions.

Navigate iSupplier Homepage



1. **Quick Links**
   This section is displayed on the right side of the screen and provides a link to all aspects of the procure-to-pay process, including Orders, Shipments, Receipts, Invoices and Payments. Click any link to go directly to the corresponding page.

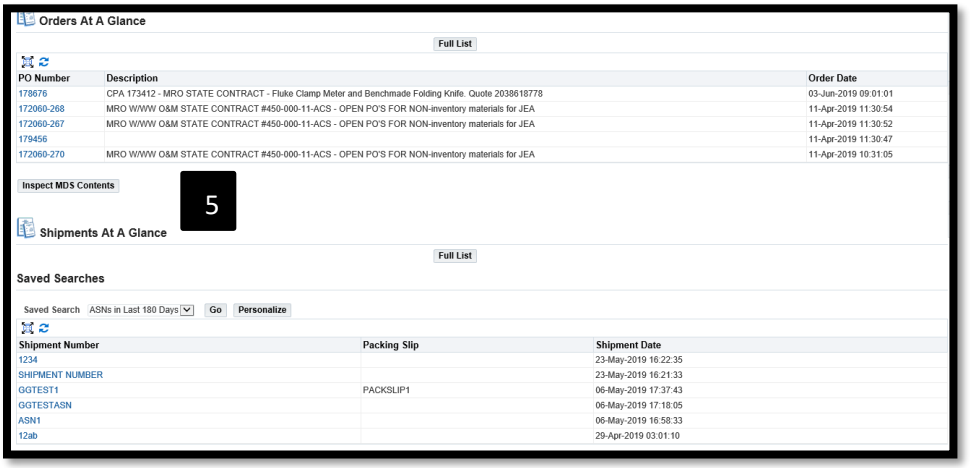
2. **Notifications**
   Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the **Notification Details** page. This page provides complete notification details, as well as the appropriate action button.

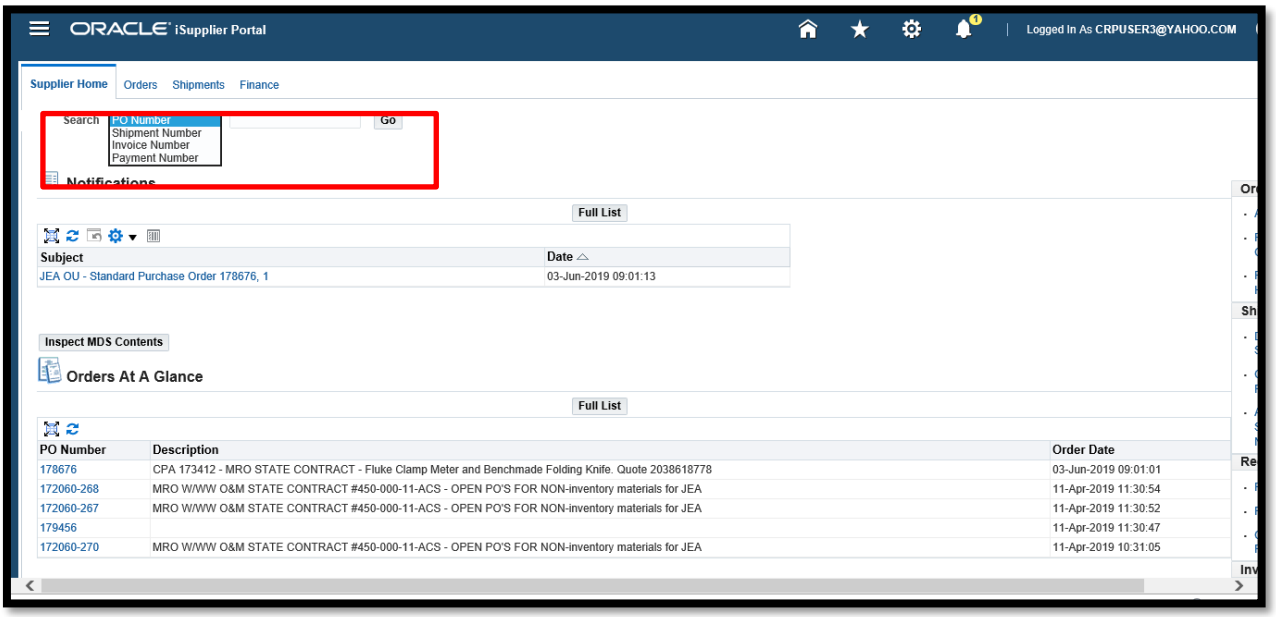
3. **Orders At A Glance**
   The last five purchase orders issued to your company will be listed in this section of the homepage. Click on the PO number to drill down to the details. Click the full list button to go to the full list of PO's on the Orders tab.

4. **Global Links (upper right hand corner)**
   - **Home** – Returns you to the main Oracle homepage.
   - **Logout** – Logs you out of the application.
   - **Preferences** – Displays the Preferences page. See Setting User Preferences for more detail.
   - **Help** - Accesses the Help Index page.

   In addition to using Quick Links, you can use the tabs on the Homepage at the top left to quickly access related task areas.

5. **Shipments At A Glance**
   The last five shipments that you have entered into the system will be listed in this section of the homepage.





Quick Search - The Quick Search feature is available to you from the **Home** page. Using Quick Search, you can look for:

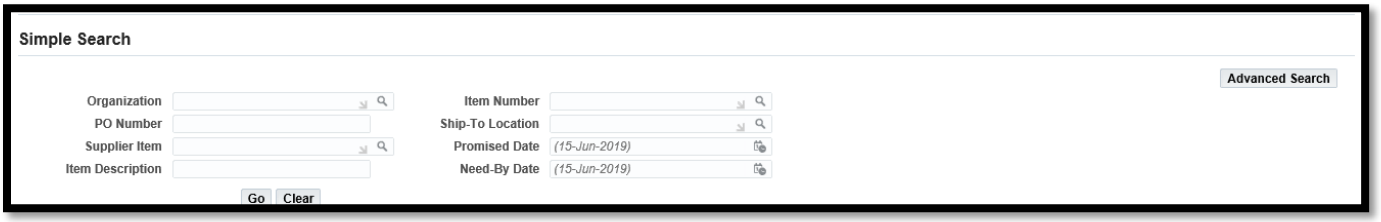
- Purchase Orders
- Shipments
- Invoices
- Payments

To perform a Quick Search:

1. Select the search type from the **Search** menu.
2. Enter a search value.
3. Click the **Go** button.

Simple Search

The Simple Search feature is available on most of the pages and allows you to specify multiple search fields and enter a criteria for each. You can use any or all of the fields available to you. The system displays only those results that match all the criteria you entered.



Note: There are two types of search fields – Free text fields and fields with a predefined list of values. The free text fields allow you to enter a full or partial value (with % as the wildcard character). On the other hand, fields with a predefined set of values require you to choose a value from a list of values available.

Tip: When entering search values, you can use the percent sign (%) as a wildcard to search for generic items. For example, to search for all orders beginning with 27 and ending in 5 (such as 275, 2715, 27125) enter 27%5. Note that the search logic attempts to find matches containing values in any position.

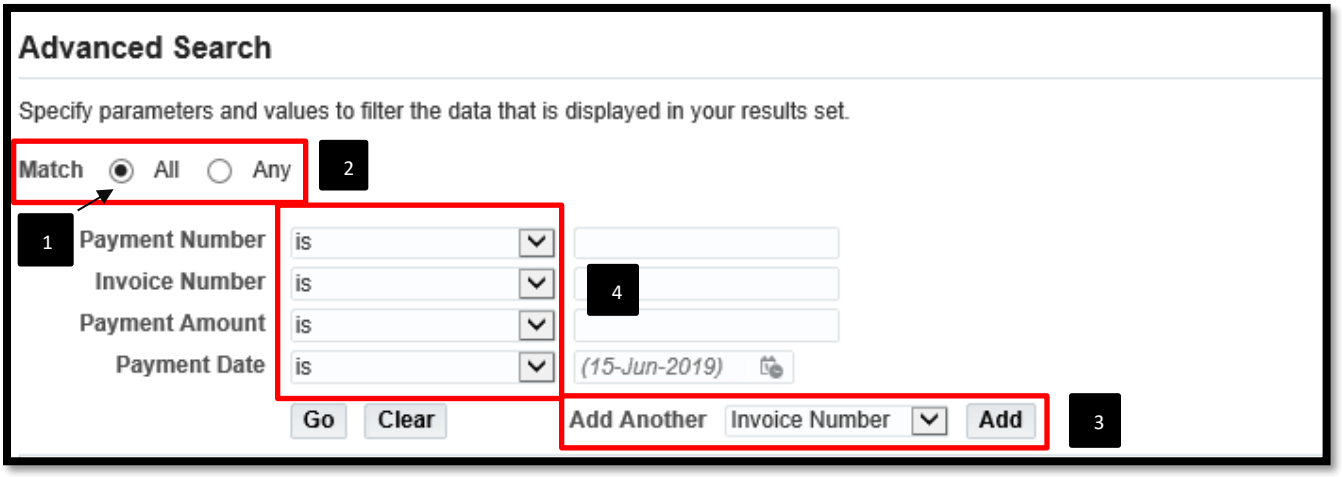
Advanced Search

Advanced Search allows you to build complex search queries containing multiple search criteria.

You can select which fields you wish to search and enter search values for each. Such fields include (among others):

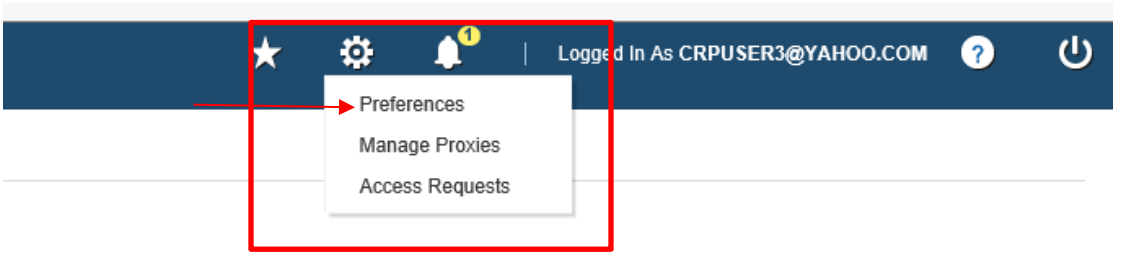
- Purchase Order Number
- Item Number
- Receipt Number

You can use the default search fields that appear in the Advanced Search function for that page, or apply additional search fields from the **Add Another** menu of the page.



1. Retrieves data only if **all** the search criteria are met.
2. Retrieves data if **any** one of the entered search criteria are met.
3. Select to add additional search conditions.
4. Various options are available to choose from in the lists for each field. Typically, these include:
    - Is
    - Is not
    - Greater than
    - Less Than

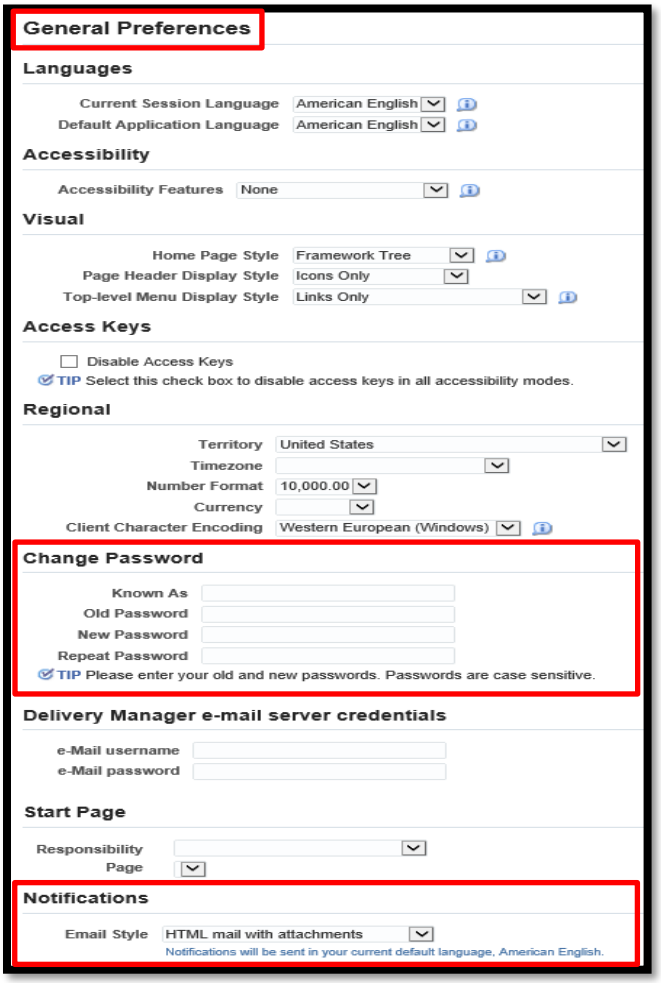
Preferences



Change your user settings or preferences at any time using the Preferences link at the top right of the screen in the JEA iSupplier Portal.

You can change the following preferences:

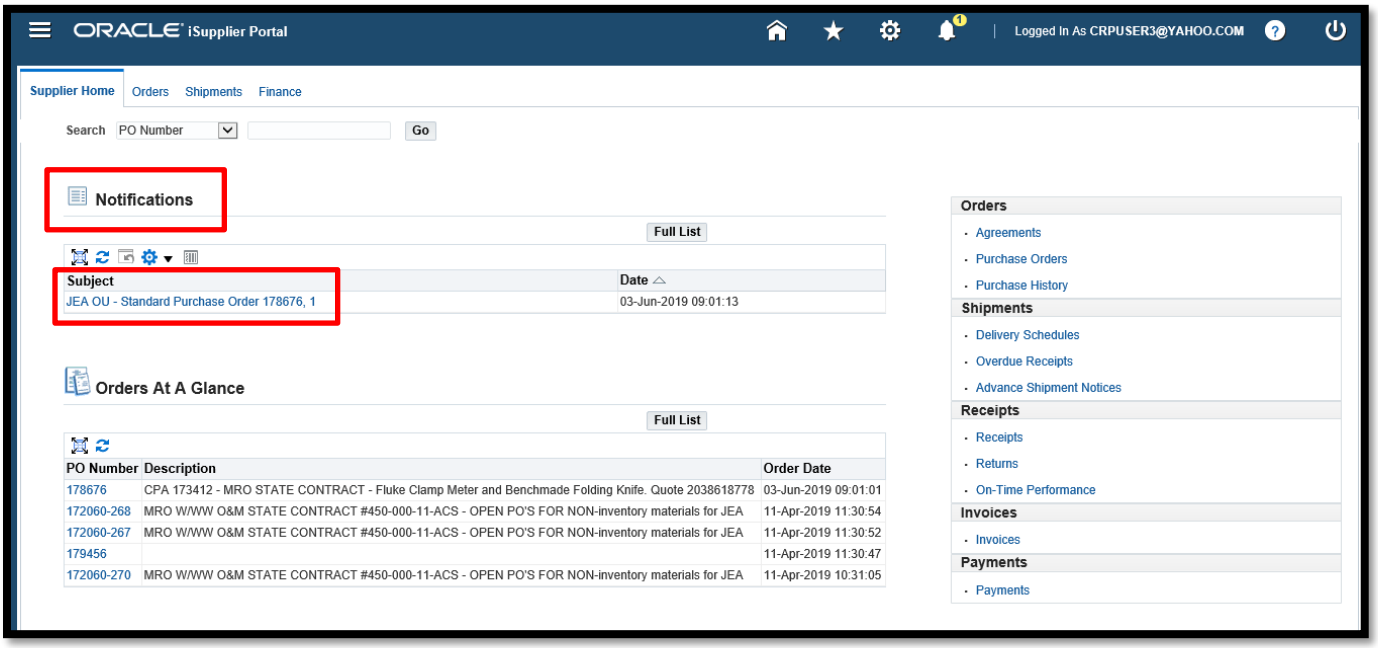
- **General**: Use this to set your accessibility and regional settings, such as time zone, number format and currency.
- **Password**: Go to this section to reset or change your password. A valid password must be at least five, but no more than thirty characters. Passwords can be numeric, alphanumeric, or special characters.
- **Notifications**: Use this section to select how you want to receive your notifications. For example, an HTML or plain text email.



Viewing Notifications

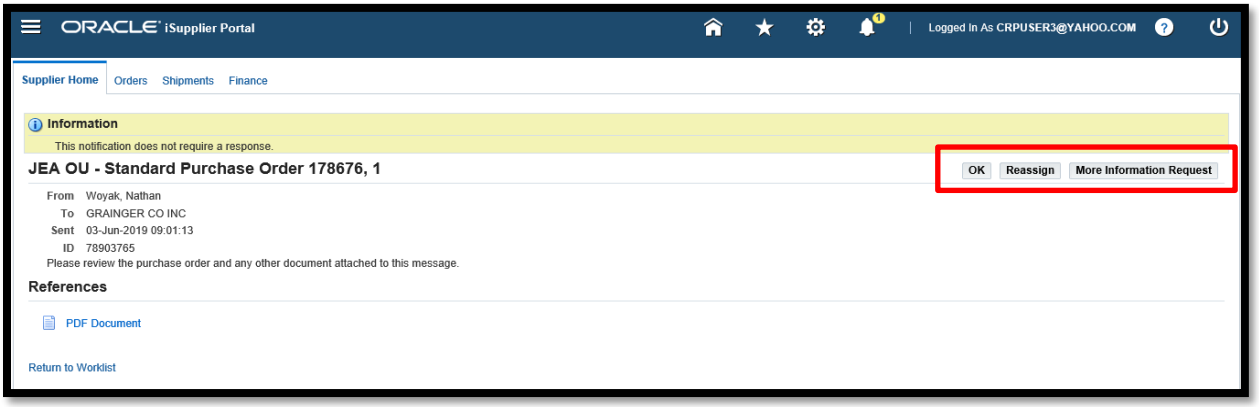
The Notification section on the Homepage displays your most recent notifications. These notifications would generally be For-Your-Information (FYI) notifications, which do not require you to perform any action.

To view the details of a notification, click the linked subject. The **Notification Details** page is displayed. This page provides complete notification details.



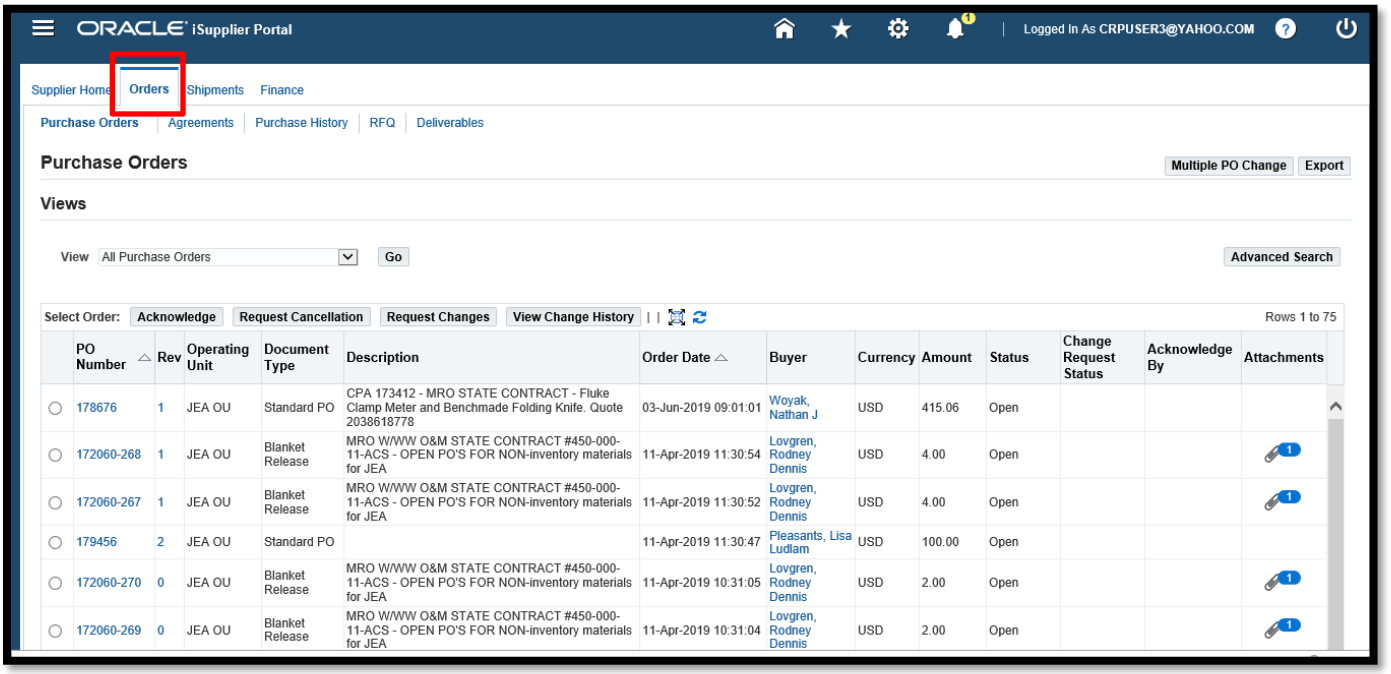
Once you click the notification you will have more options in the upper right hand side. The options are

- OK
- Reassign
- More information Request



Orders

Using purchase order information, you can acknowledge purchase orders, make change requests to purchase orders, or cancel orders. You can also view supplier agreements and the revision history of a purchasing document.



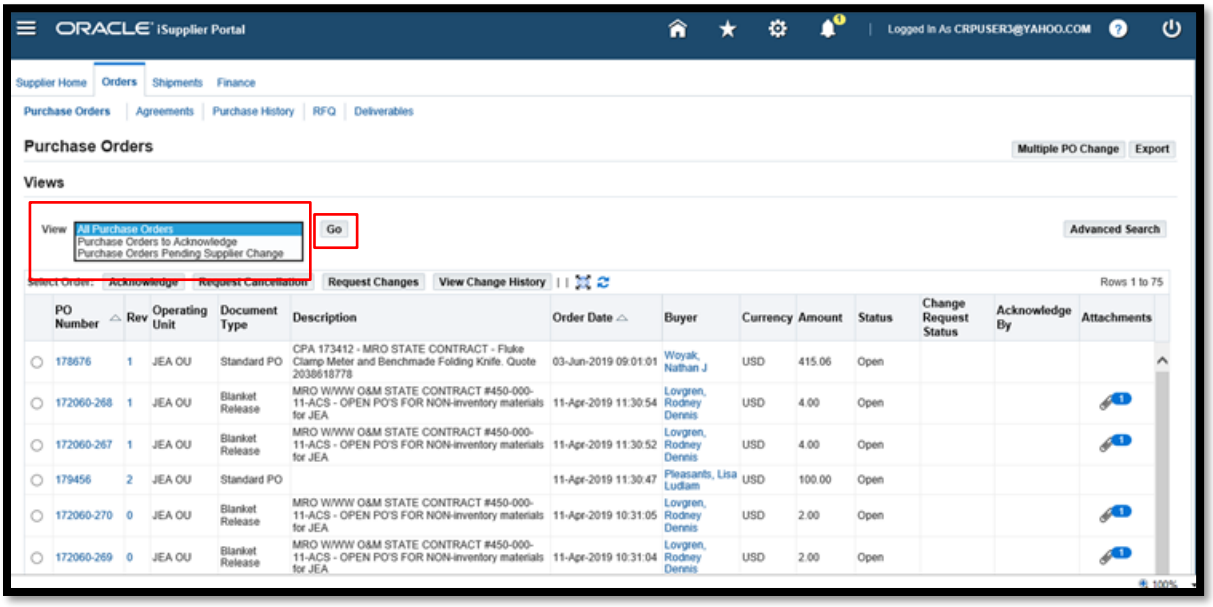
Viewing Purchase Orders

The View Purchase Orders page display the most recent purchase orders. Use the scroll bar on the right to view more.

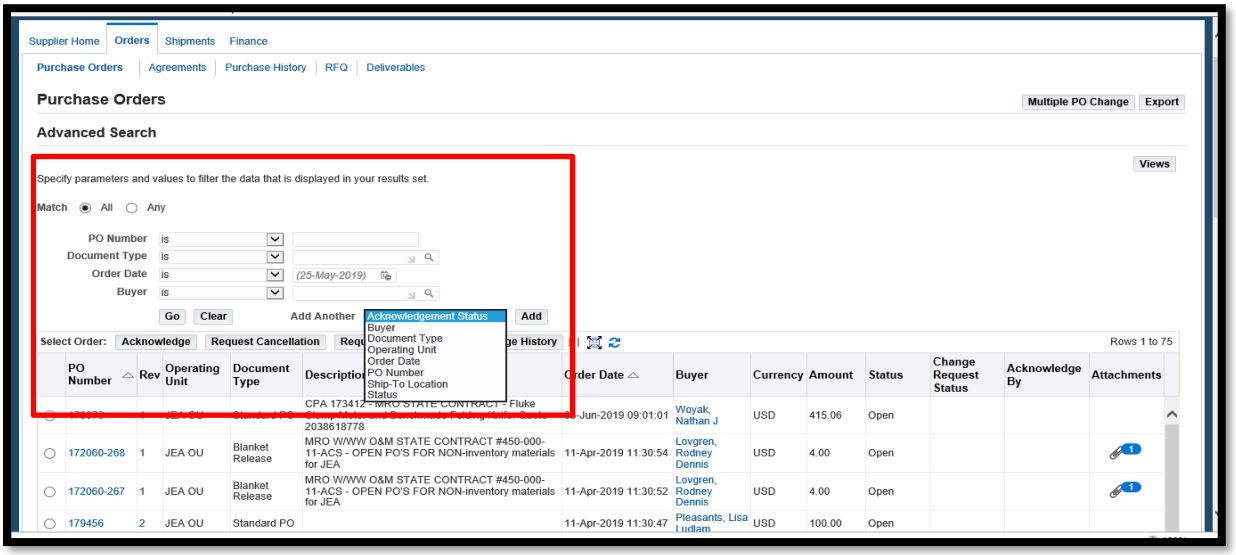
From the View menu, choose which purchase orders to display:

- All Purchase Orders
- Purchase Orders to Acknowledge
- Purchase Orders Pending Change

Then click **Go.**



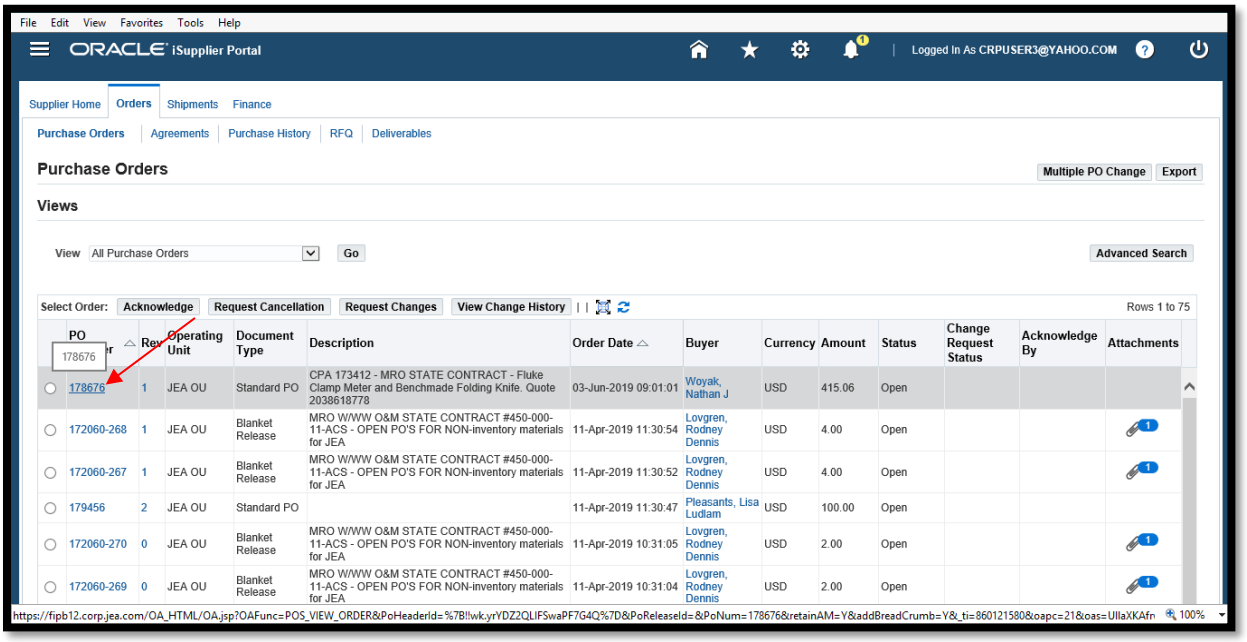
Click the Advanced Search button to perform a more exact search for a PO. See “Advanced Search” on the page for more details.

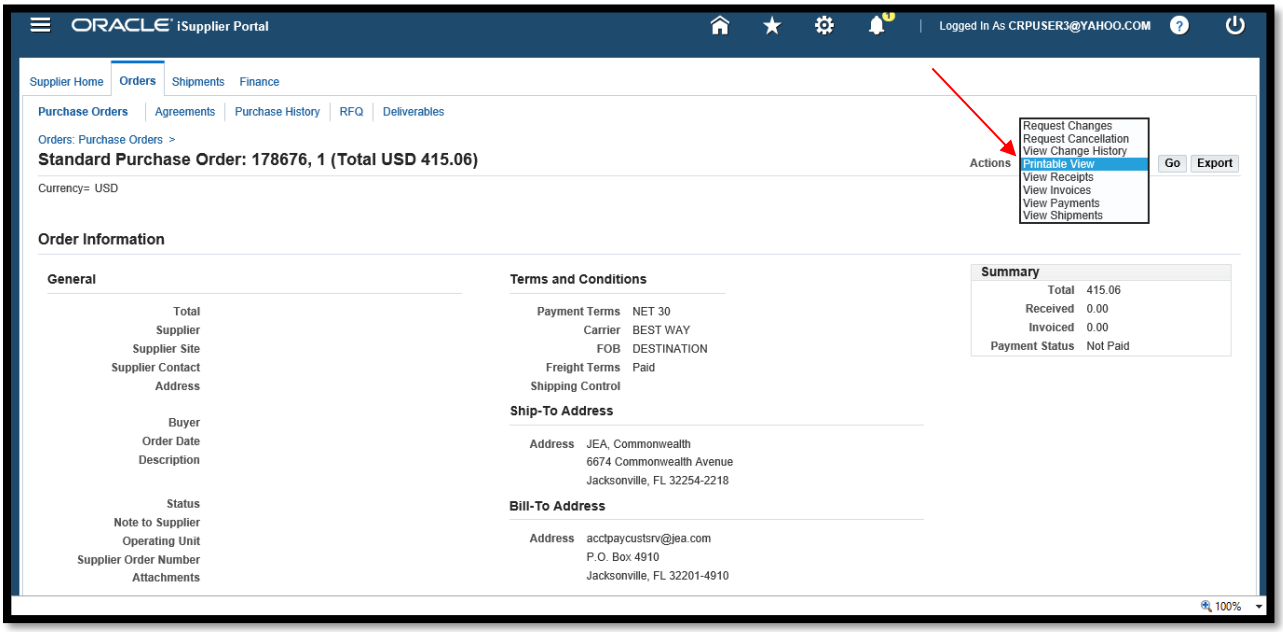


Printing Purchase Orders

From the details of a purchase order you can request a printable view:

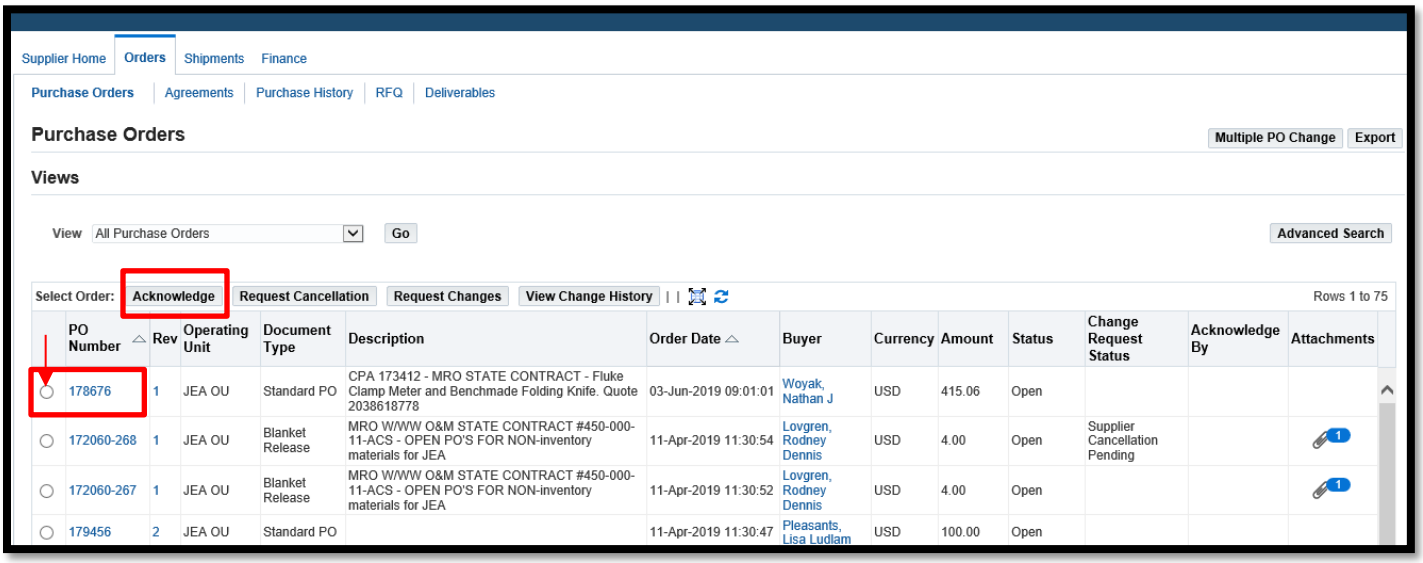
1. Click on the PO number you would like to print from the Purchase Orders screen. You will also see the details of the PO on the screen.
2. Select **"Printable View"** and click Go.





Acknowledge Purchase Orders:

Access the purchase order you wish to acknowledge by clicking on the PO number link or by selecting the line and clicking the **Acknowledge** button.



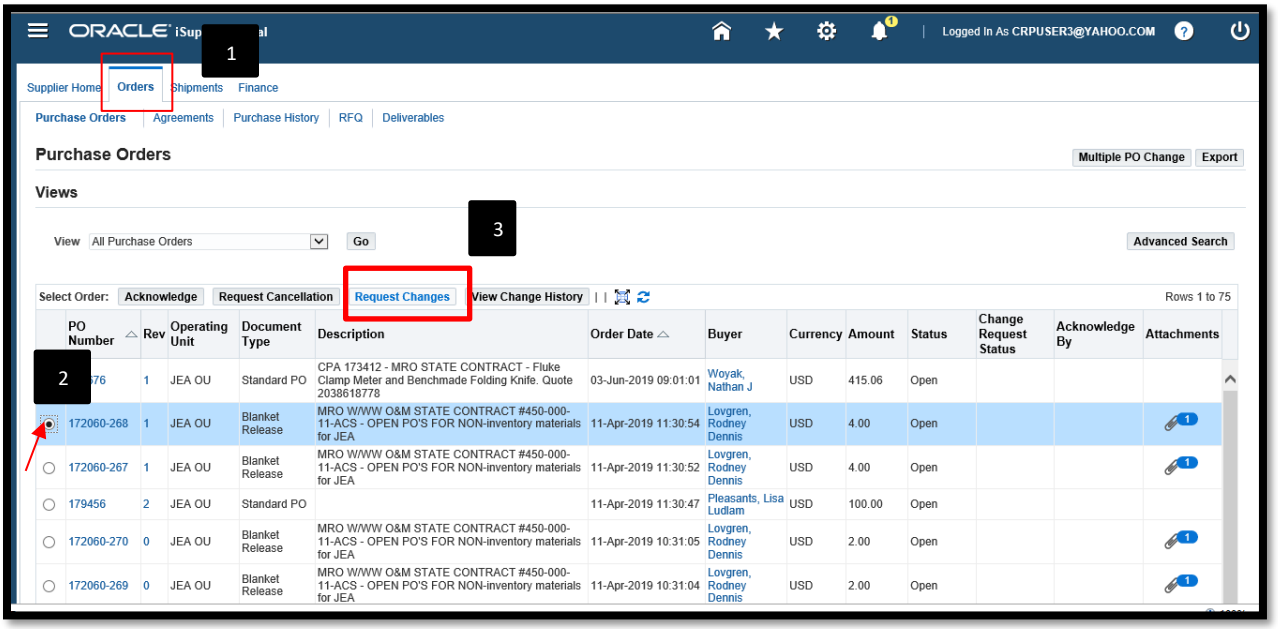
The buyer will receive a notification that the order has been accepted.

Requesting Changes for Existing Open Purchase Orders

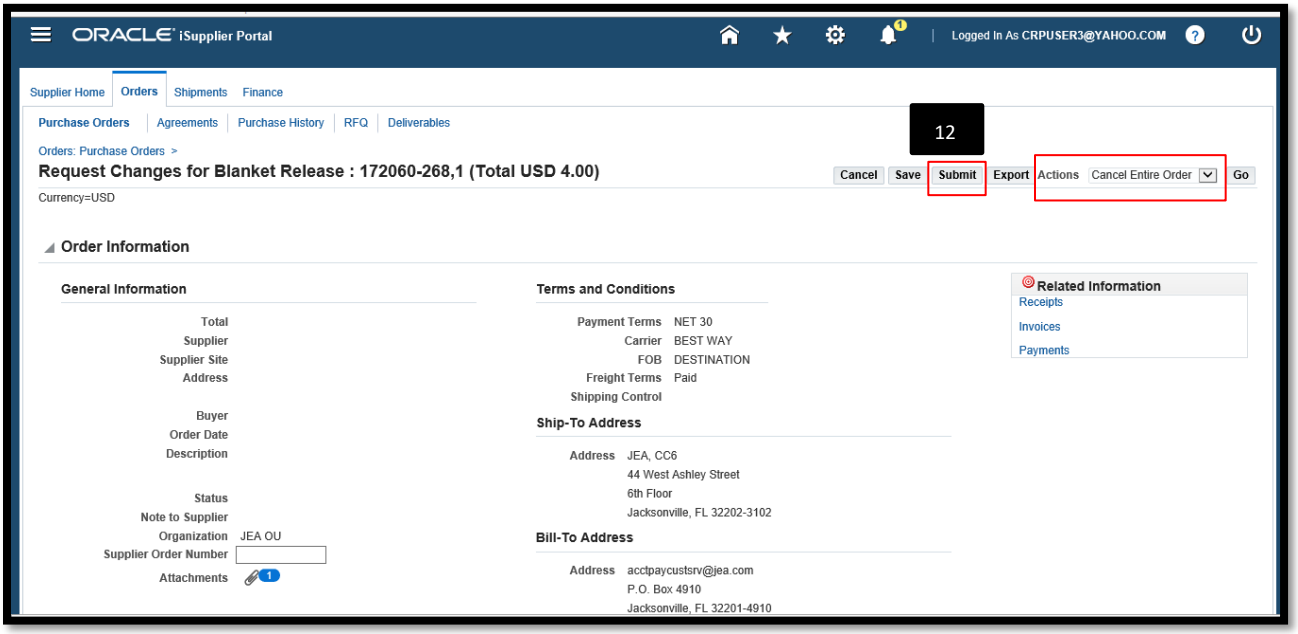
General Changes

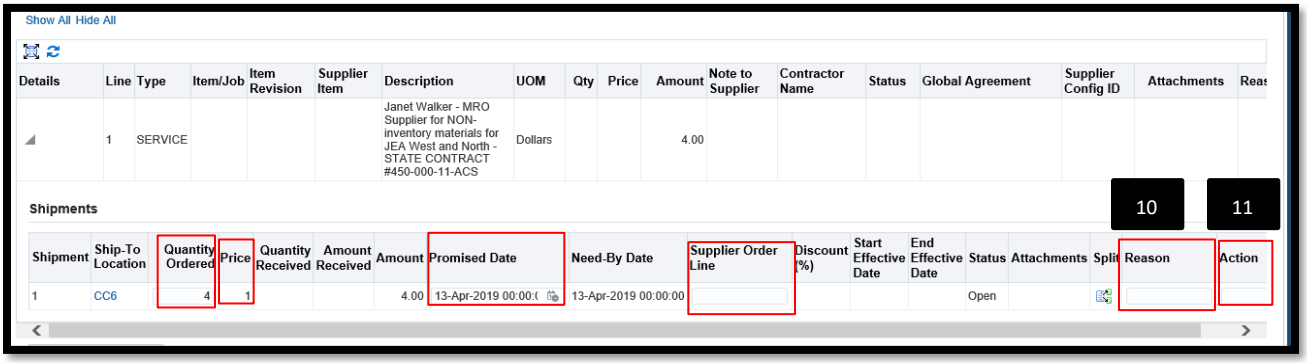
To submit a single change request:

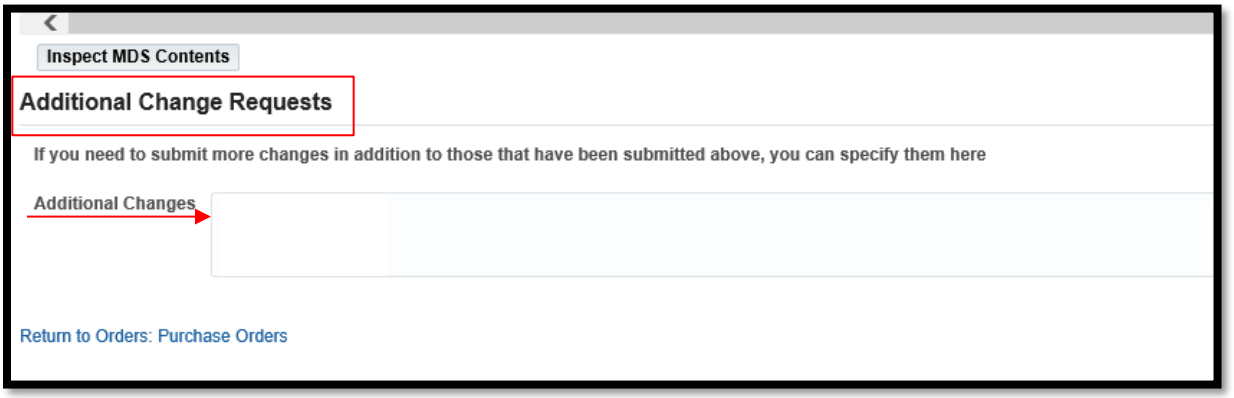
1. Click the **Orders** tab, and then click **Purchase Orders** in the task bar below the tabs.
2. On the View Purchase Orders page, search for and select the purchase order for which you wish to request changes.
3. Select the purchase order and click Request Changes.



4. On the **Request Changes** page, enter your changes.
5. You may request changes to the following values :
    a. Price/Price Breaks on Blanket Agreements
    b. Supplier Item
    c. Supplier Order Reference Number
6. In the reason text box, enter a reason for your change request.
7. ***If you wish to request changes to shipments. You can request changes to***
    a. ***Price/Price Breaks on Blanket Agreements***
    b. ***Quantity Ordered***
    c. ***Promised Date***
    d. ***Supplier Order Line***
    e. ***Note that you can also enter change request information in the Additional change requests section***
8. Change Request text box.
9. Enter the changed values as appropriate.
10. Enter a reason for your change.
11. Select the appropriate action.
12. Click Submit.


ORACLE iSupplier Portal
Logged In As CRPUSER3@YAHOO.COM
Supplier Home
Orders
Shipments
Finance
Purchase Orders
Agreements
Purchase History
RFQ
Deliverables
12
Orders: Purchase Orders >
Request Changes for Blanket Release : 172060-268,1 (Total USD 4.00)
Cancel
Save
Submit
Export
Actions
Cancel Entire Order
Go
Currency=USD
Order Information
General Information
Total
Supplier
Supplier Site
Address
Buyer
Order Date
Description
Status
Note to Supplier
Organization JEA OU
Supplier Order Number
Attachments
Terms and Conditions
Payment Terms NET 30
Carrier BEST WAY
FOB DESTINATION
Freight Terms Paid
Shipping Control
Ship-To Address
Address JEA, CC6
44 West Ashley Street
6th Floor
Jacksonville, FL 32202-3102
Bill-To Address
Address acctpaycustsrv@jea.com
P.O. Box 4910
Jacksonville, FL 32201-4910
Related Information
Receipts
Invoices
Payments


Show All Hide All
Details
Line
Type
Item/Job
Item Revision
Supplier Item
Description
UOM
Qty
Price
Amount
Note to Supplier
Contractor Name
Status
Global Agreement
Supplier Config ID
Attachments
1
SERVICE
Janet Walker - MRO Supplier for NON-inventory materials for JEA West and North - STATE CONTRACT #450-000-11-ACS
Dollars
4.00
Shipments
10
11
Shipment
Ship-To Location
Quantity Ordered
Price
Quantity Received
Amount Received
Amount
Promised Date
Need-By Date
Supplier Order Line
Discount (%)
Start Effective Date
End Effective Date
Status
Attachments
Split
Reason
Action
1
CC6
4
1
4.00
13-Apr-2019 00:00:0
13-Apr-2019 00:00:00
Open


Inspect MDS Contents
Additional Change Requests
If you need to submit more changes in addition to those that have been submitted above, you can specify them here
Additional Changes
Return to Orders: Purchase Orders

Note: You can also change multiple orders simultaneously by clicking on the Multiple PO Change button.

1. Click on the Multiple PO Change
2. Search for POs
3. Select PO to change
4. Enter default information

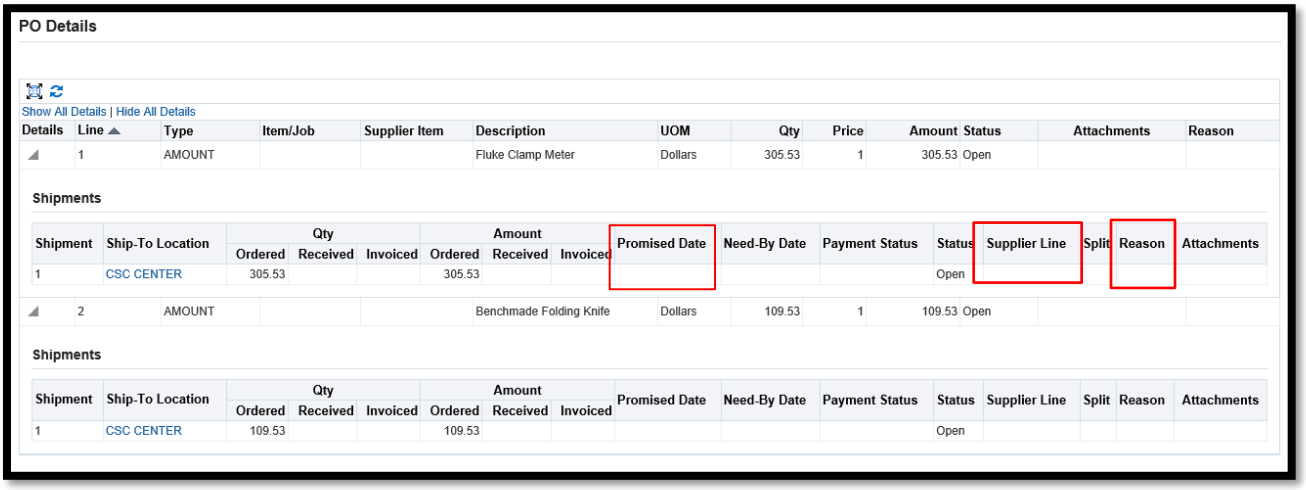
Changing Shipment Information

After selecting your Purchase Order, click the show all icon and then click on the arrows to display the information for each line.

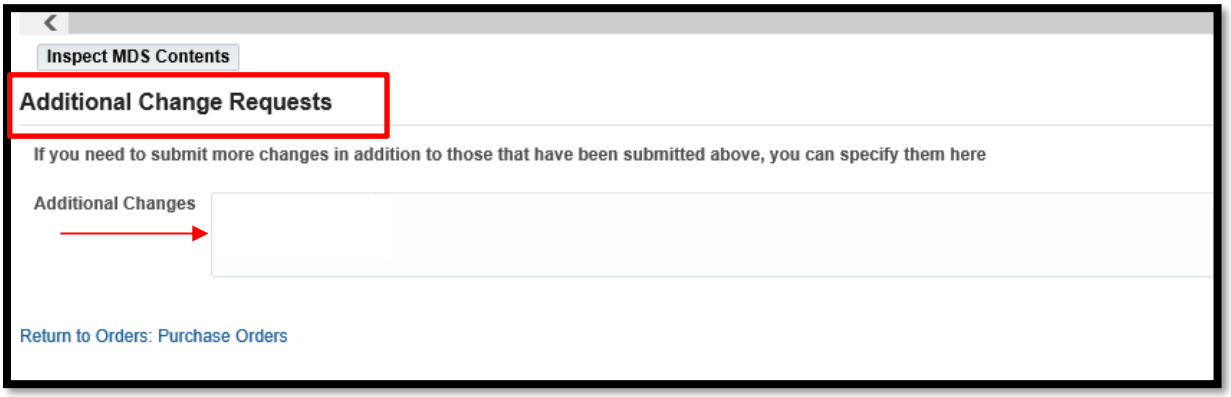
You will then be able to update the shipment information such as:

a. Promised date
b. Supplier Line
c. Reason
d. Action

You also have the option to split a shipment at this point as well

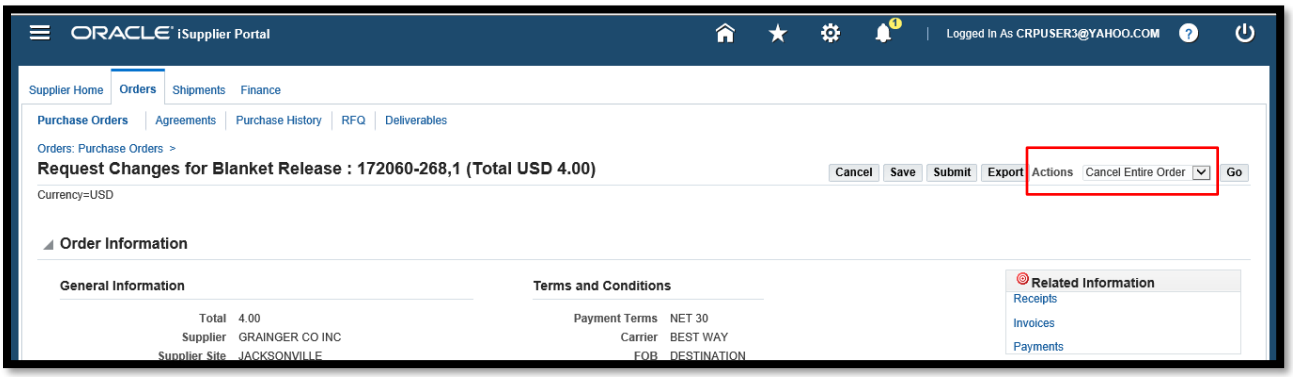


You can also enter additional details to inform the buyer of other requested changes.

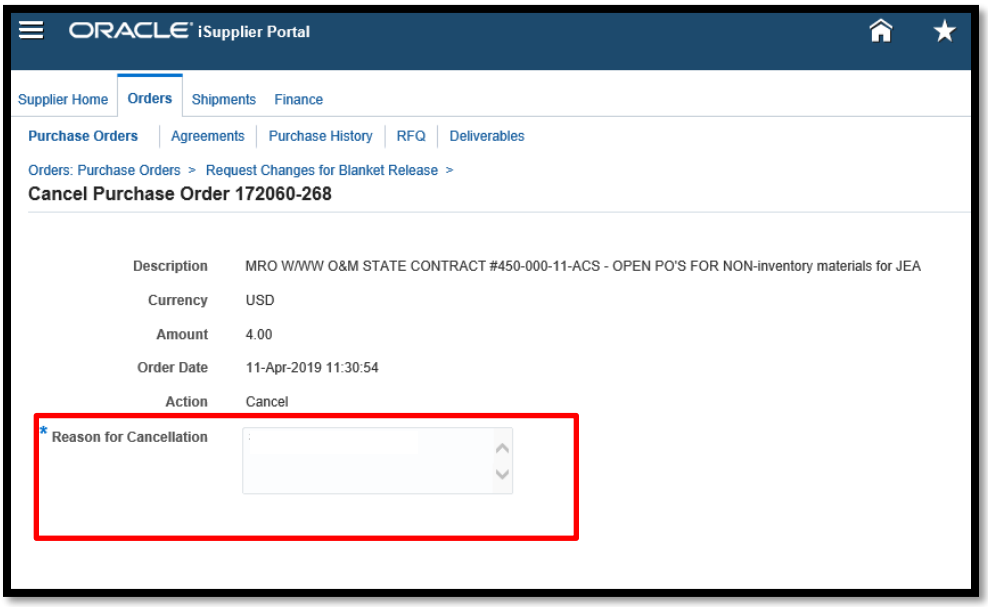


Cancellations

1. After selecting your Purchase Order to cancel, click actions list of values.
2. Select the Cancel Entire Order Button action and click Go.

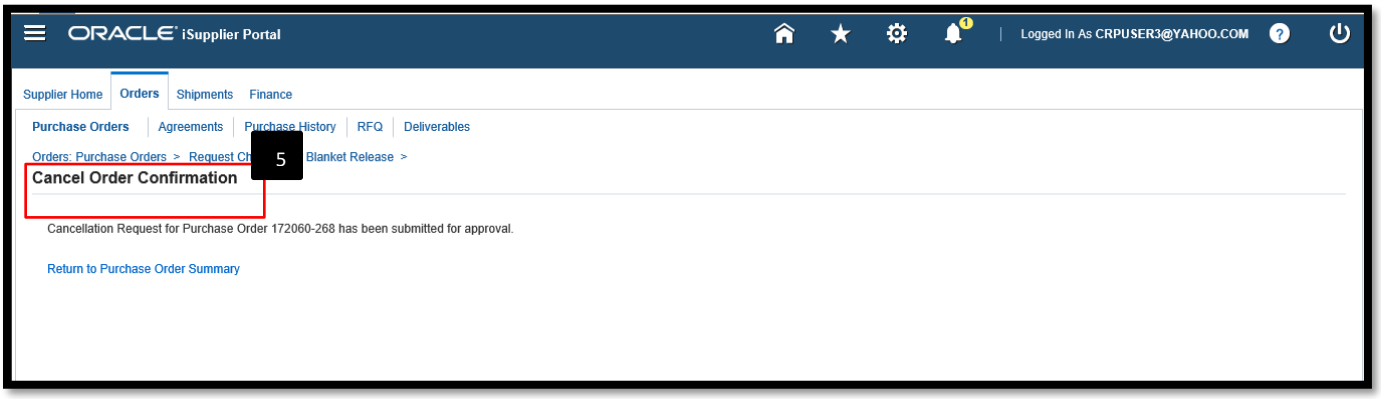


3. Enter a reason for cancellation.



4. Click Submit.

5. You will receive a Cancel Order confirmation message.
6. The order will go into a Supplier Cancellation Pending status until it is accepted by the JEA Buyer.

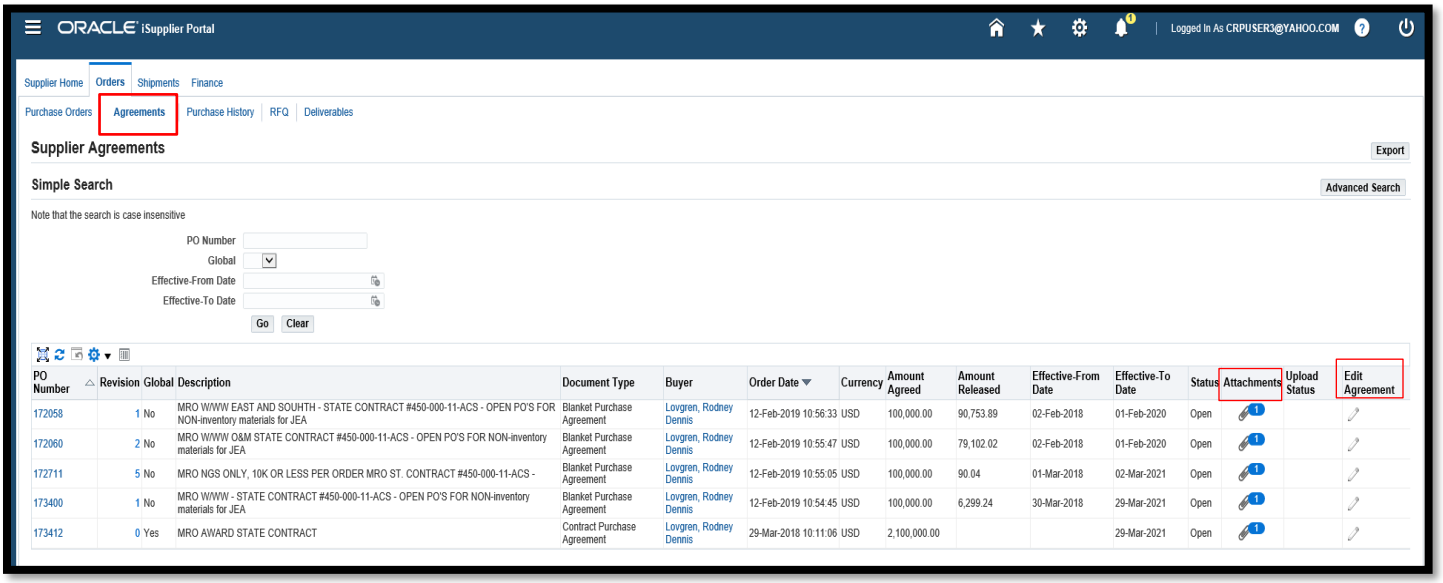


Agreements

Supplier agreements are purchase agreements (Pricing Arrangements) you have made with JEA. On the Supplier Agreements page, you can review the details of those agreements, and the corresponding releases (orders) that have been created for a particular agreement.

View

To view agreements, click the Orders tab, and then Agreements in the task bar directly below the tabs. Use the search criteria to get a summarized list of agreements. For each agreement, you can select to view the releases created to date for that agreement. You can export details from any page.



Purchase History

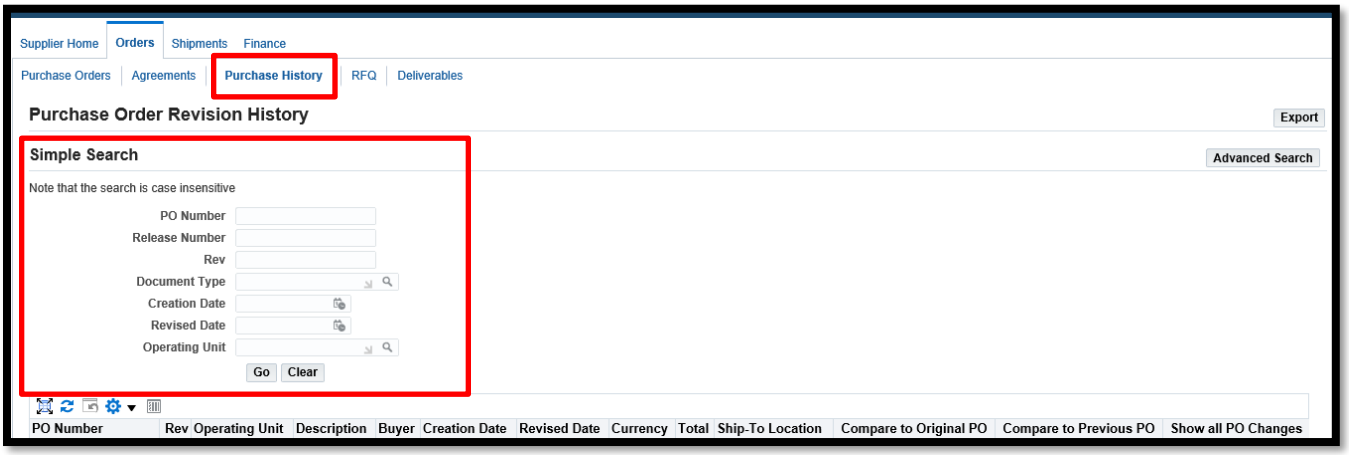
The PO Revision History page enables you to search for details on the revision history of a Purchase Order.

Using the search criteria, you can get a summarized list of purchase orders that have been revised. You may choose to compare each revised PO to the original PO, to the previous PO. You can also view all changes made to the PO.

View

To view the PO Revision History:

1. From the iSupplier Portal Home page, click the Orders tab, then click the Purchase History subtab.
2. Enter search criteria to identify the purchase order(s) you wish to inspect. Click **Go.**



Shipments

JEA iSupplier Portal enables you to view your existing shipments. Using your shipments you can create or cancel advance shipment notices. The system enables you to view other shipment information such as delivery schedules.

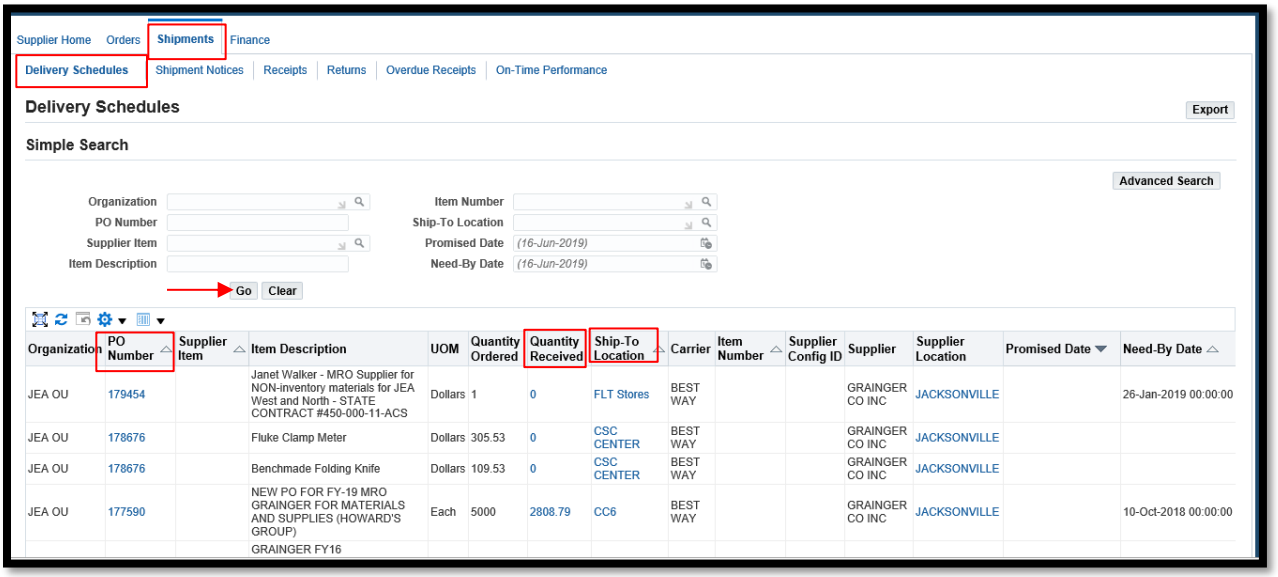
Using shipping features, you can alert the buyer to upcoming shipments and expedite receipts and payments for the buying company.

Shipping information details all of your shipping transactions on Oracle iSupplier Portal. You can create or cancel shipment notices as well as view shipment delivery schedules and overdue shipment receipts.

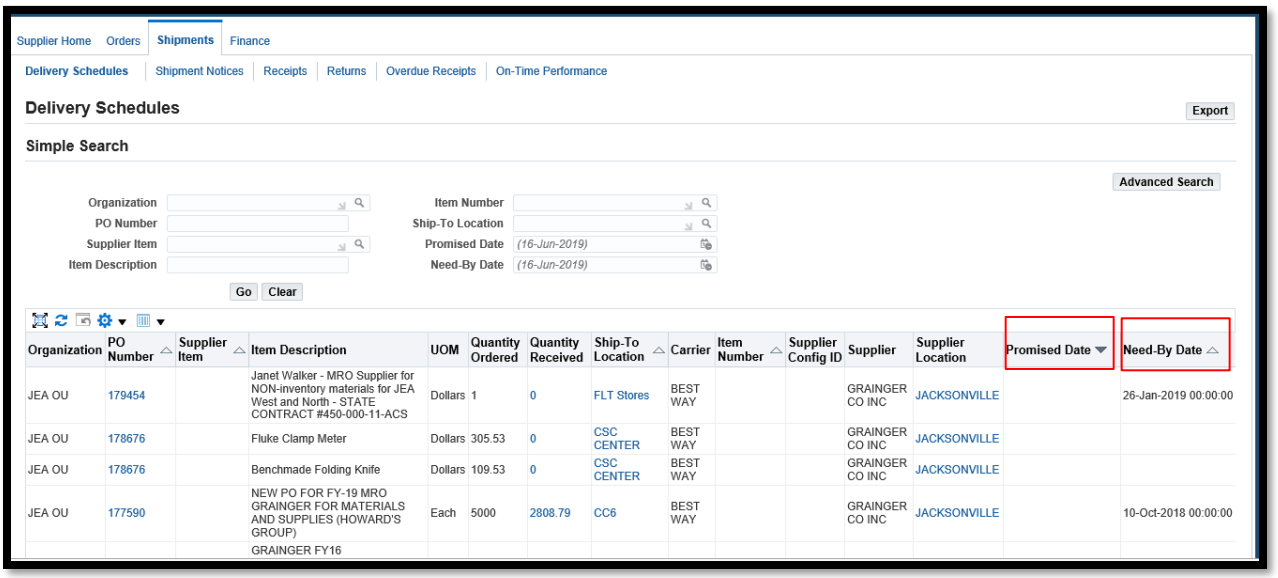
Delivery Schedules

You can use the Delivery Schedules Results page to quickly determine deliveries that need to be scheduled and deliveries that are past due. Click the purchase order number, quantity received, and ship-to location links to view further detail.

To search all delivery schedules simply click **Go.**

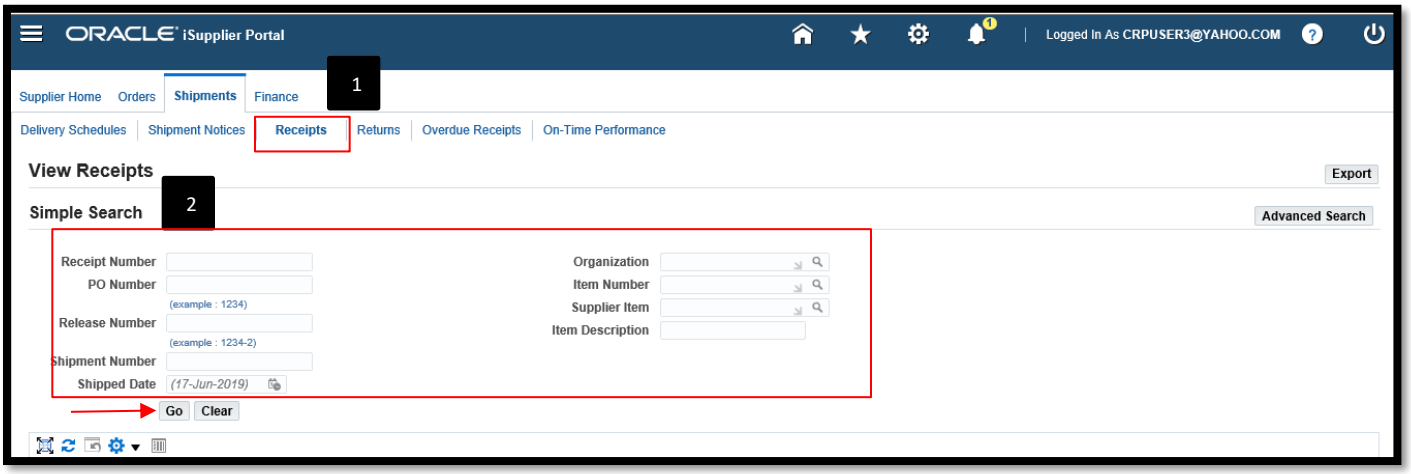


The delivery schedules tab also displays the Promised Date and Need By Date which can be used for comparison



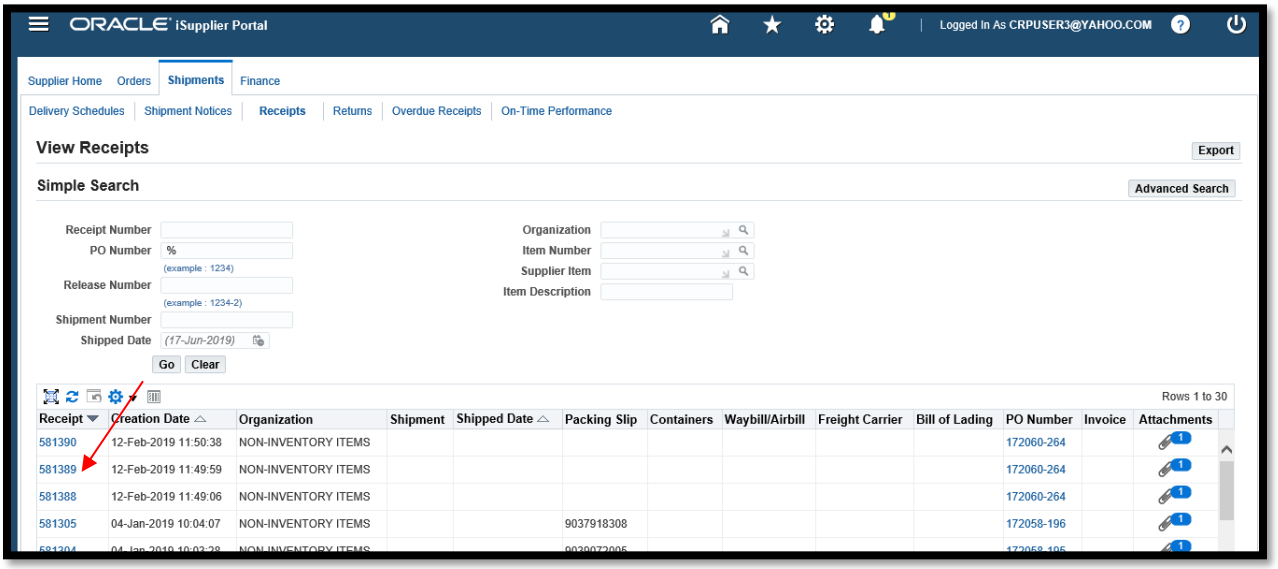
Shipment Receipt Details

1. Click the receipts link under the shipments tab.
2. The View receipt window is displayed. Use any of the available search criteria to query receipts.

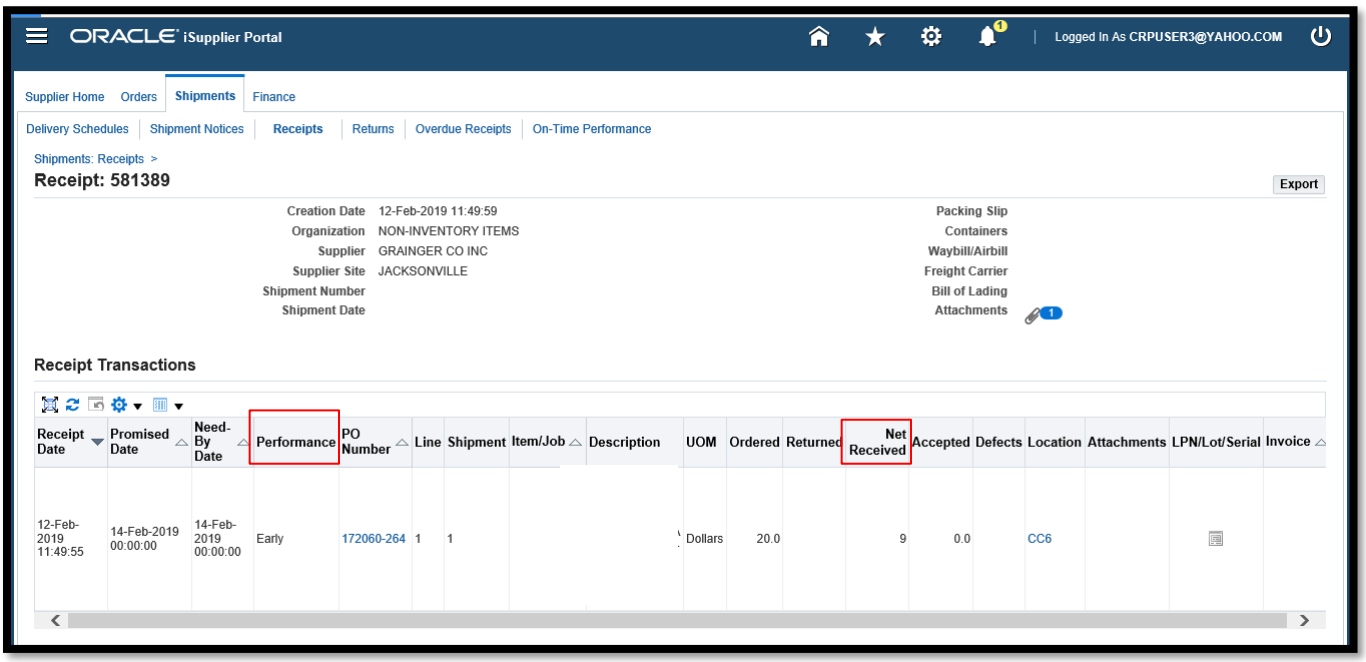


Search results are displayed.

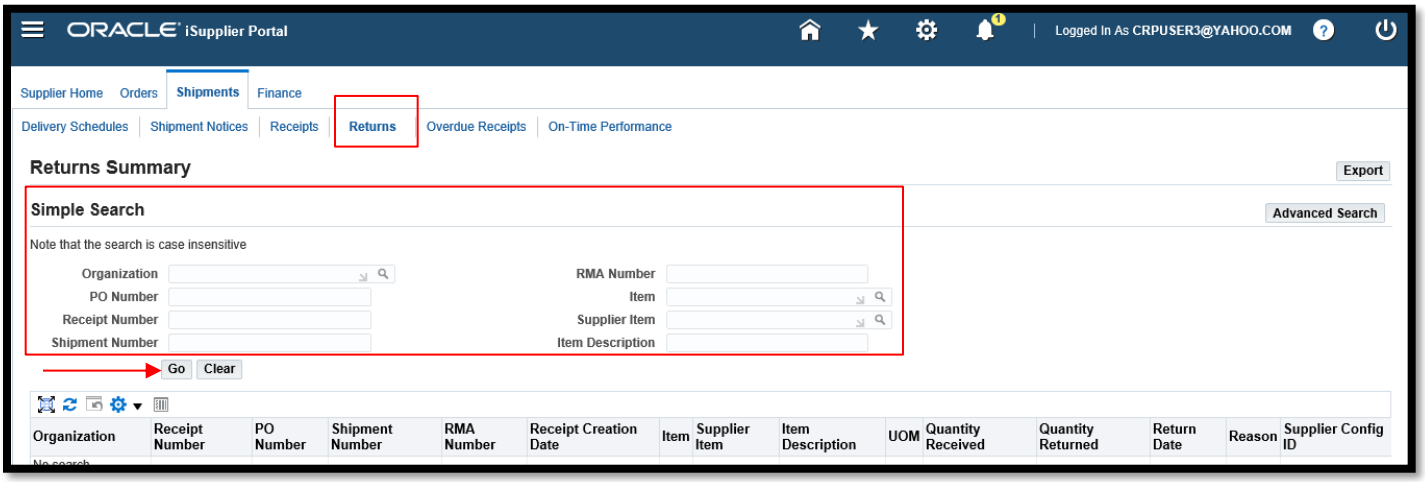
Click the link for Receipt to view detail information



Detailed information for the receipts is diplayed such as **Performance** and **Net Received**



Shipment Returns



Click the returns tab under the Shipments Tab.

The returns summary window is displayed.

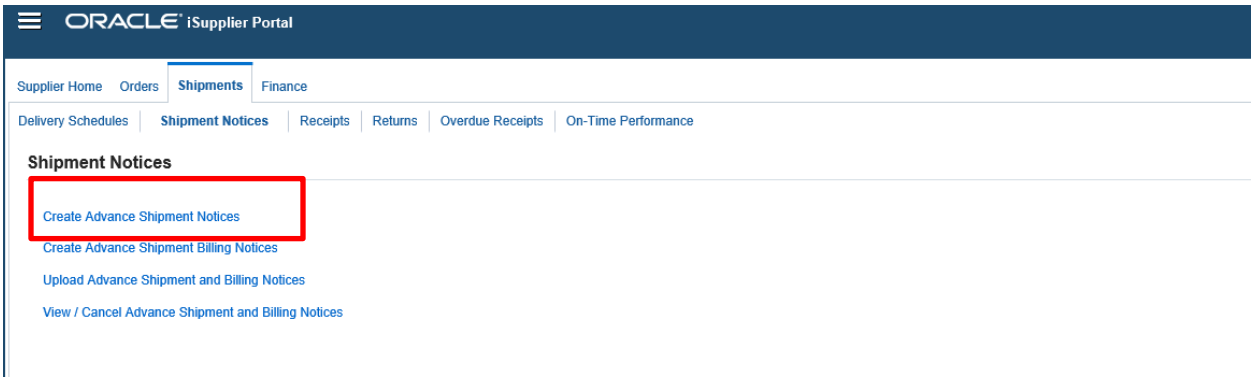
Use any available search criteria to query returns.

Click the receipt link to view.

Shipment Notices

Create ASN

Click “Create Advance Shipment Notices”.



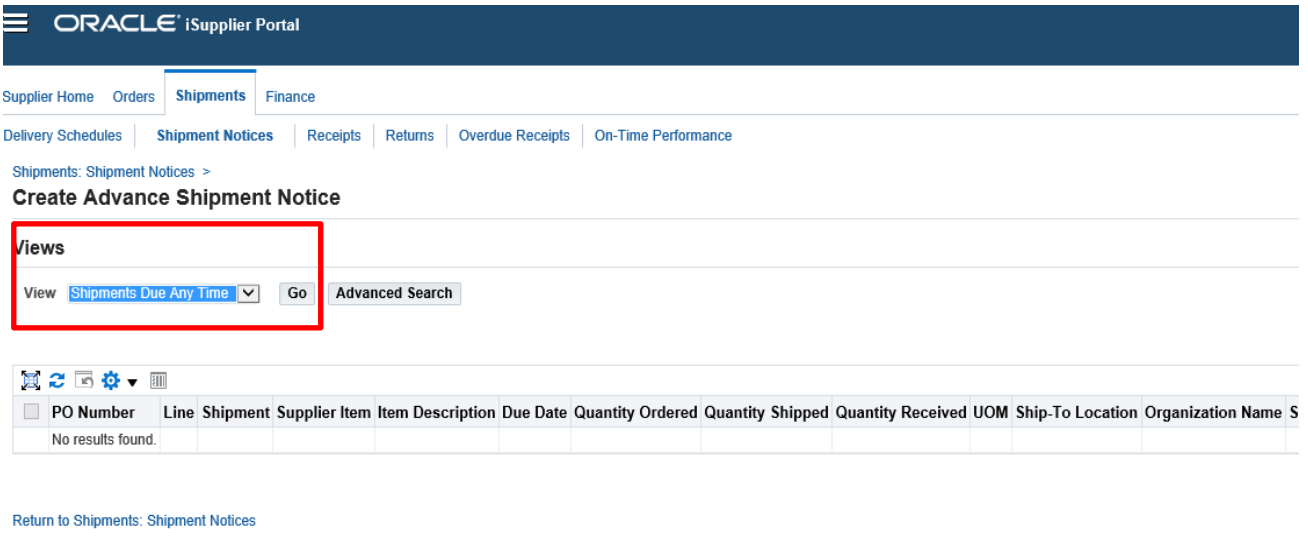
Search for the shipment you would like to create an avanced shipoment notice.

You can select:

“Shipments Due this Week”

Shipments Due any time

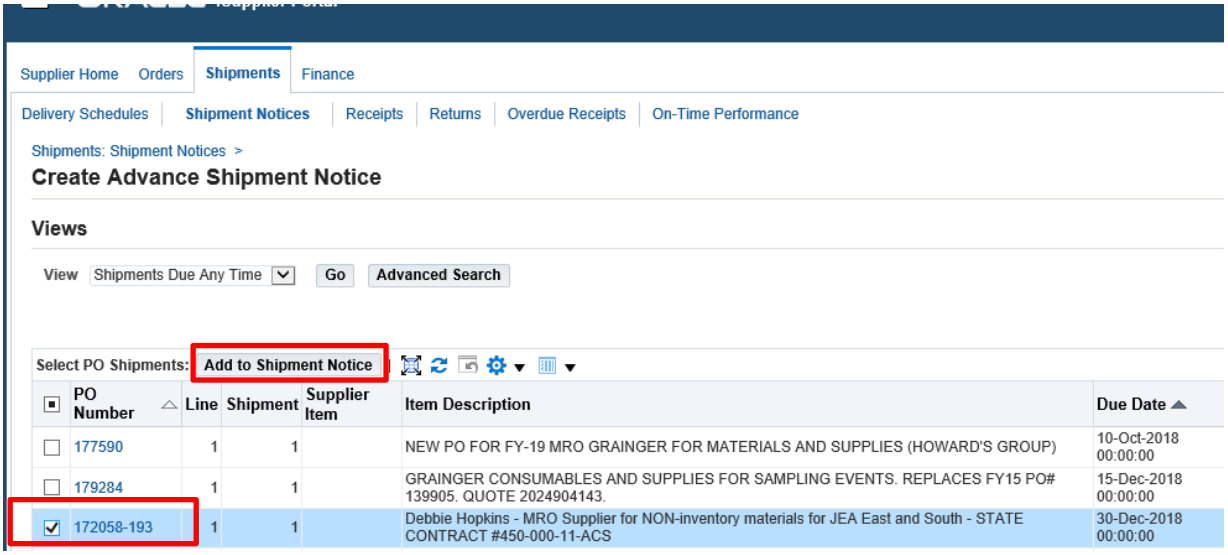
Then click Go



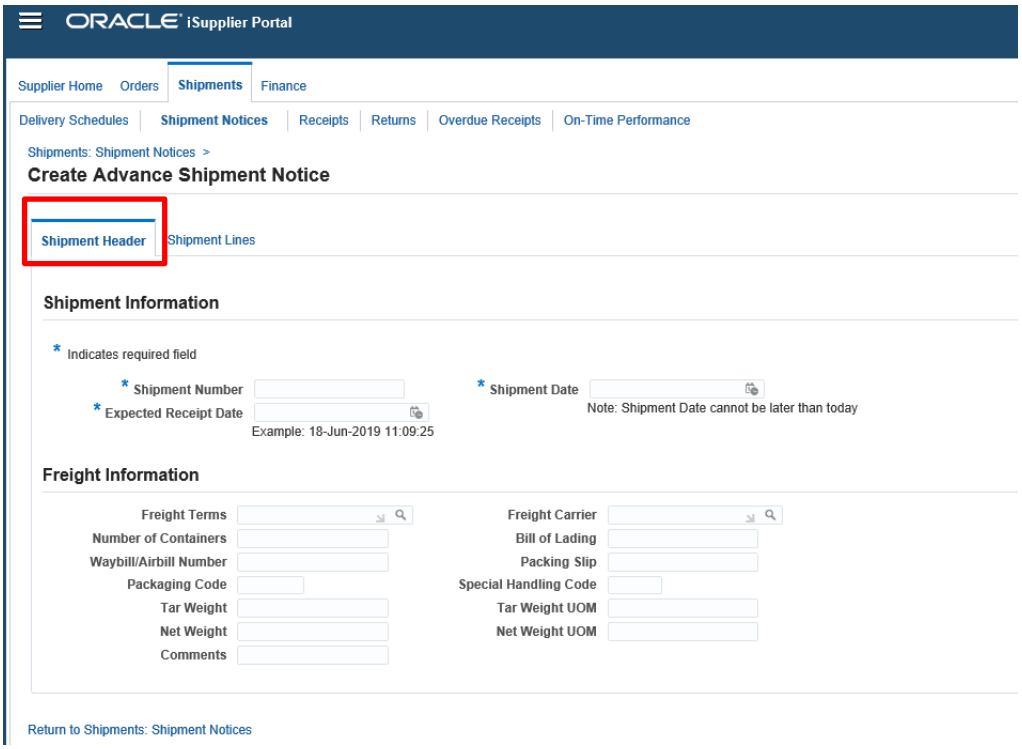
Check the PO you would like to create an advanced shipment notice for.

Note: you can select multuple POs as well

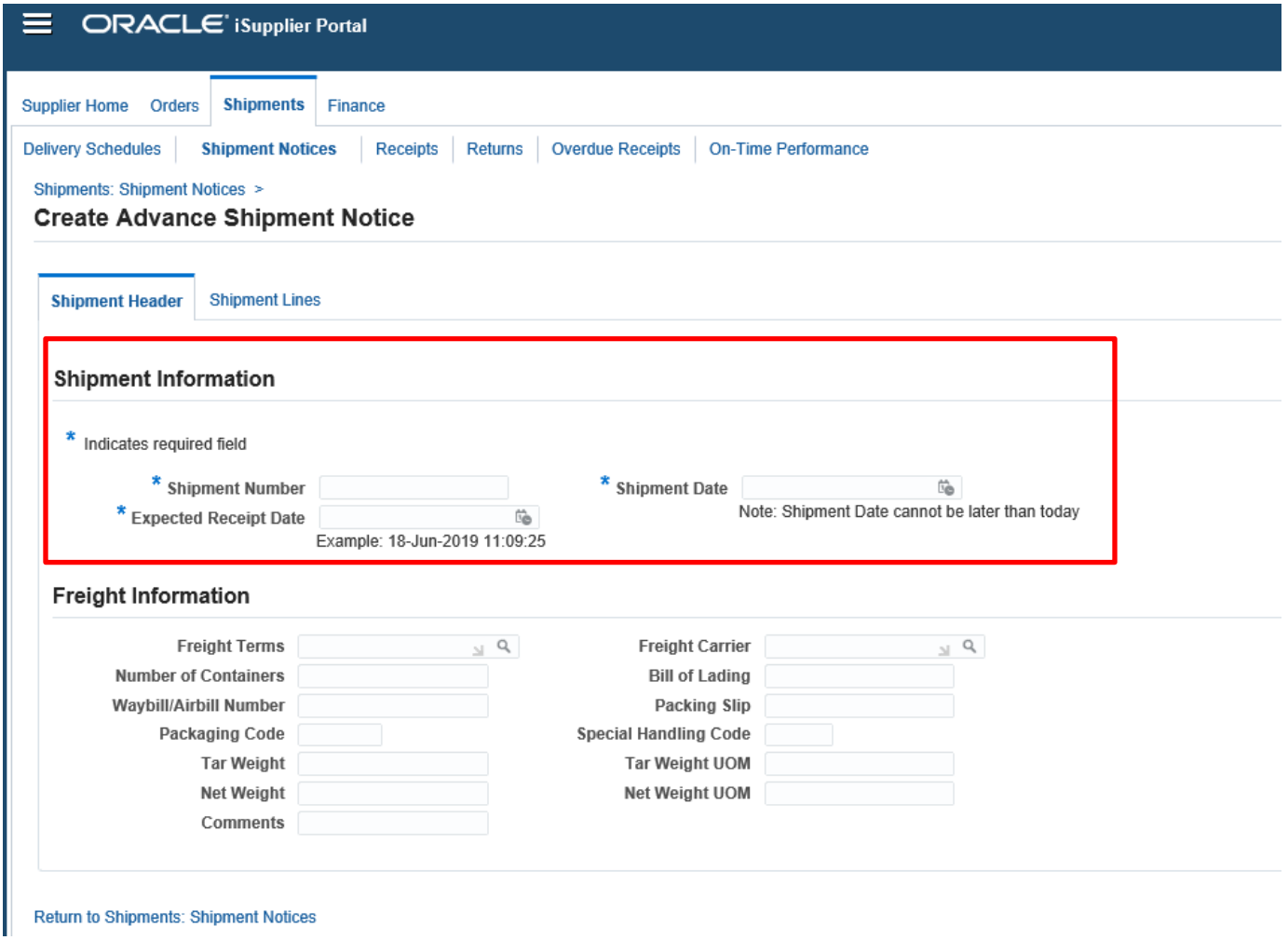
Then Click " Add Shipment Notice"



Select Shipment Header Tab.

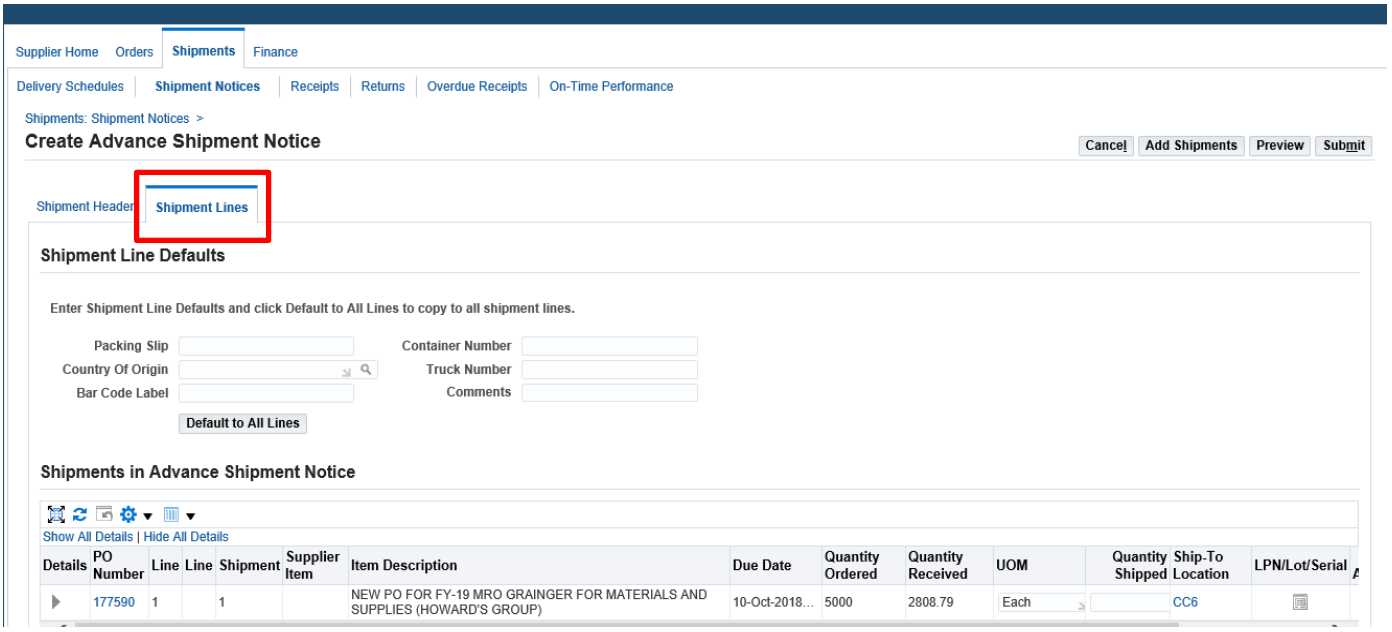


Provide the Shipment Information: Shipment Number, Shipment date, and expected Receipt date as they are required

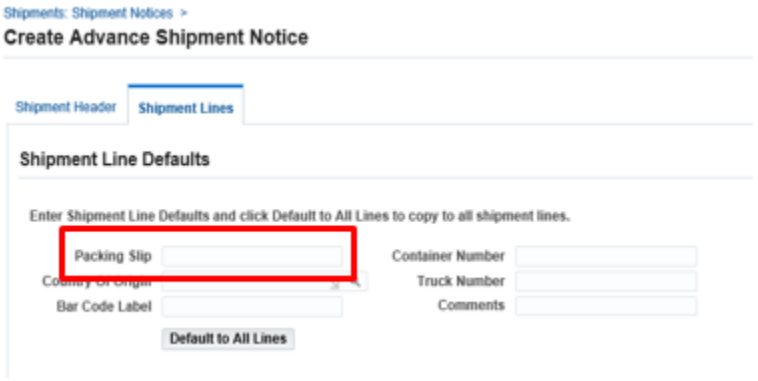


Freight Information has no required information but you are welcome to enter any of the information listed in that

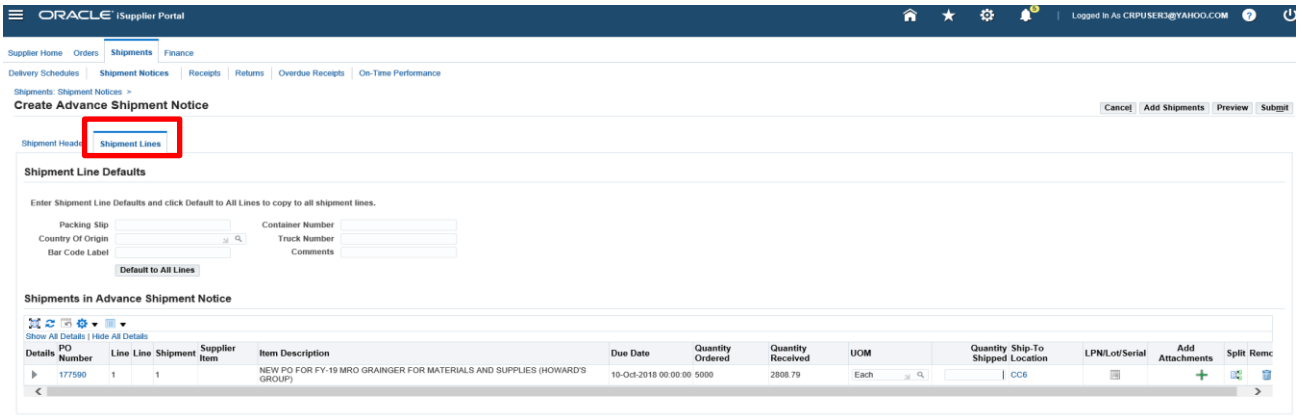
Click the shipment Lines tab



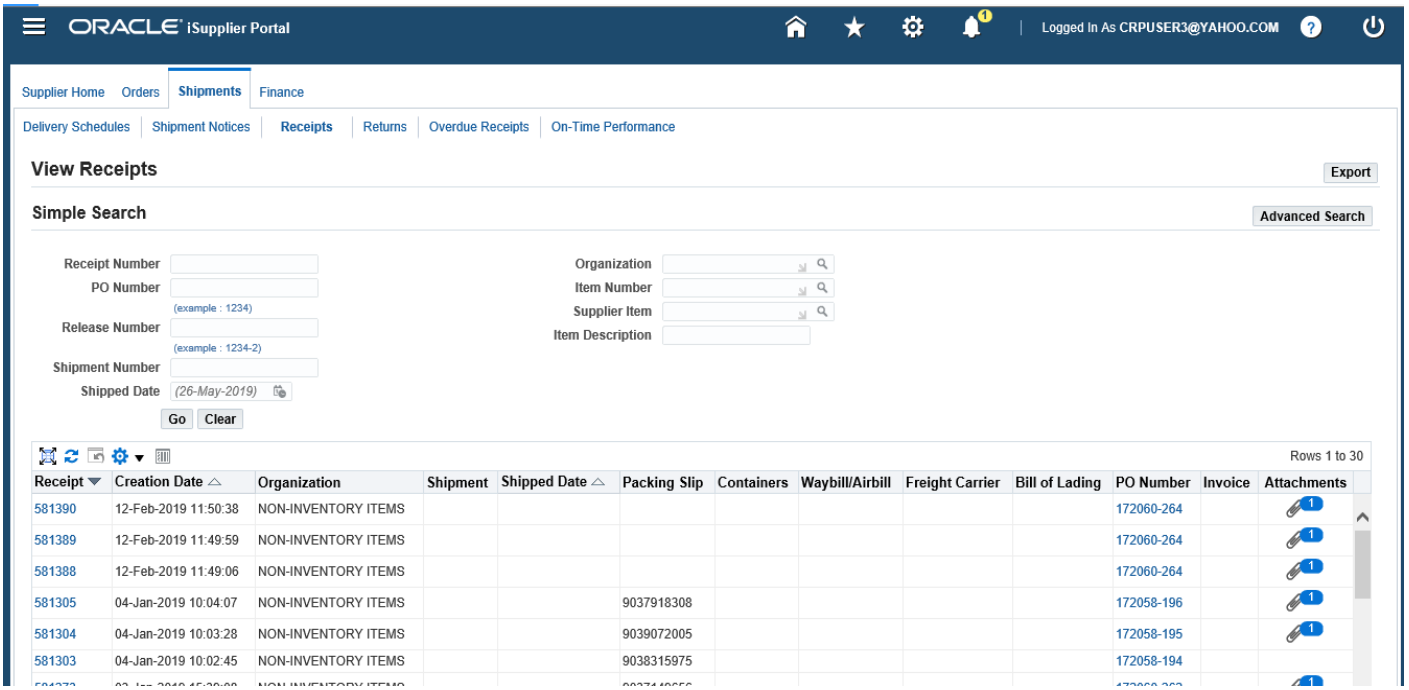
Enter the Packing Slip Number.



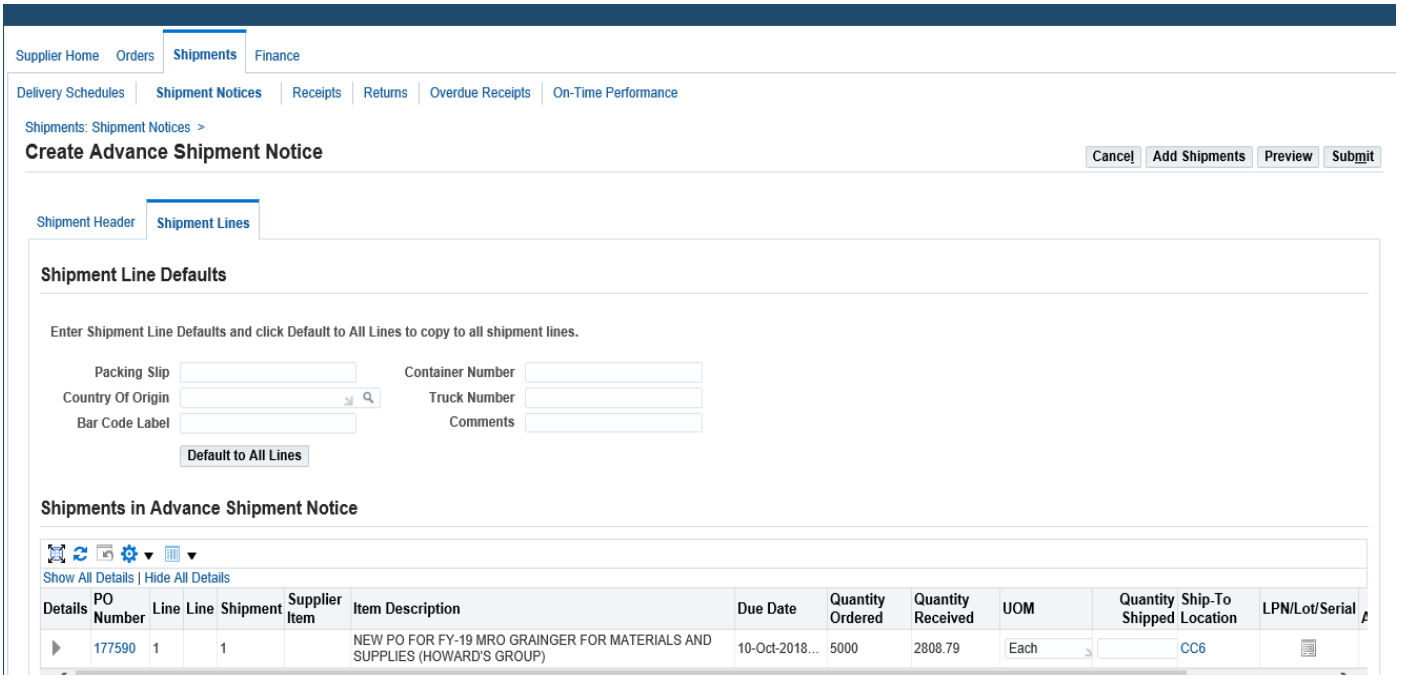
At the Select Lines.



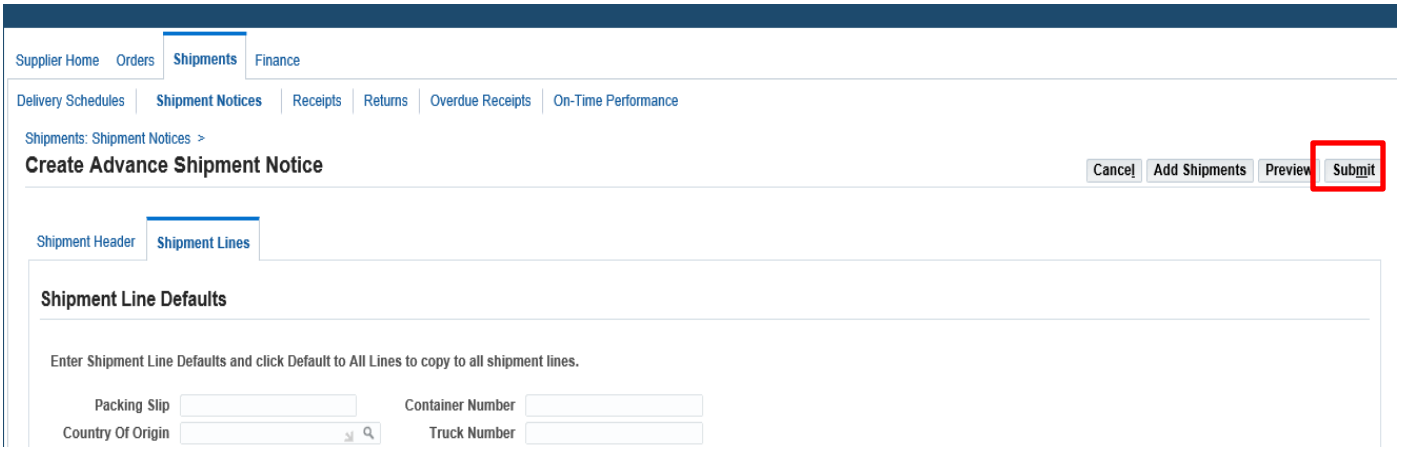
Receipts



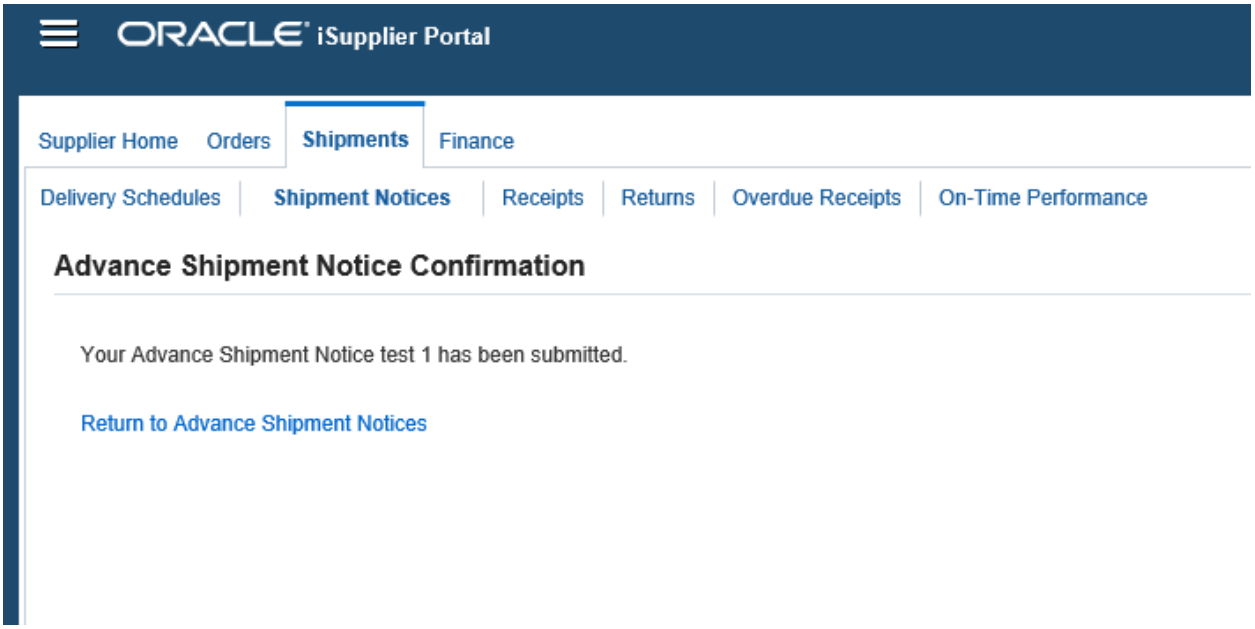
For each line enter the quantity of each item shipped.



Click submit.



You will receive an Advanced Shipment Confirmation.

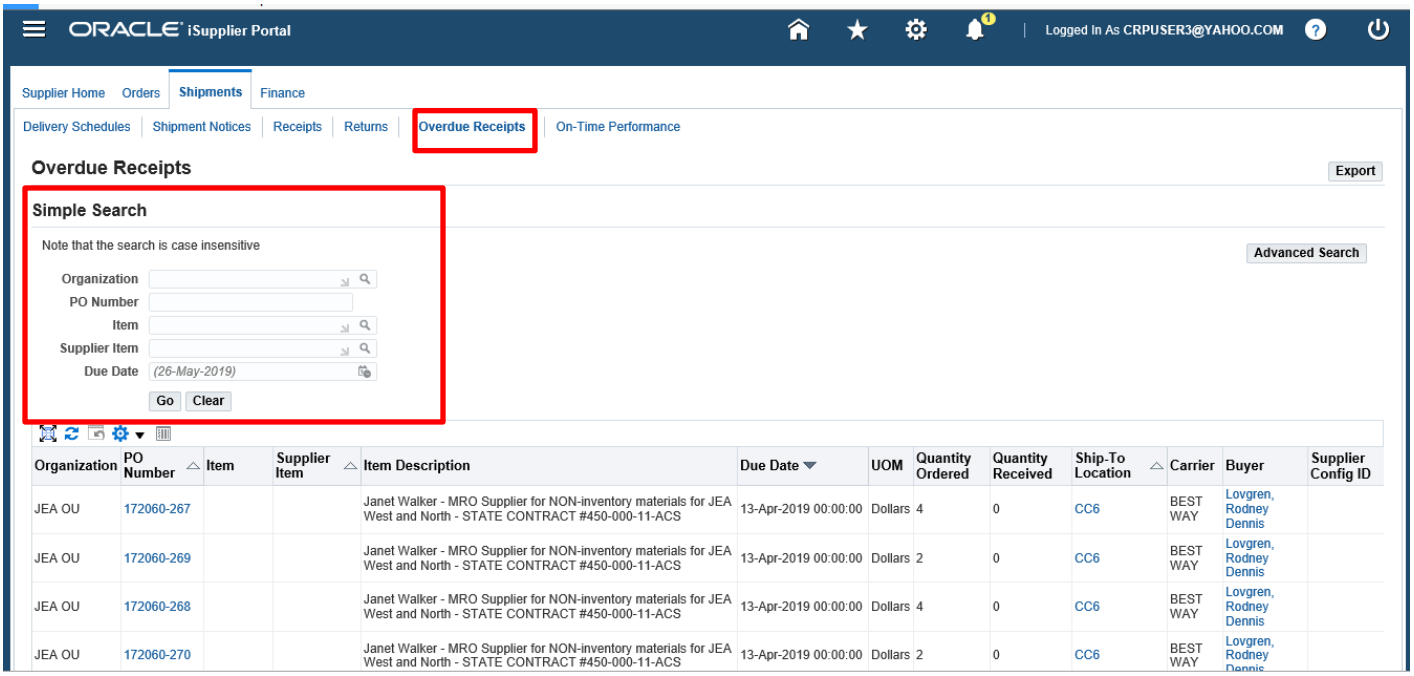


Overdue Receipts

The Overdue Receipts Results page enables you to view the details of past due purchase order shipments. Click the PO number, Ship-To Location, and Buyer to view further detail.

Click on Overdue Receipts link

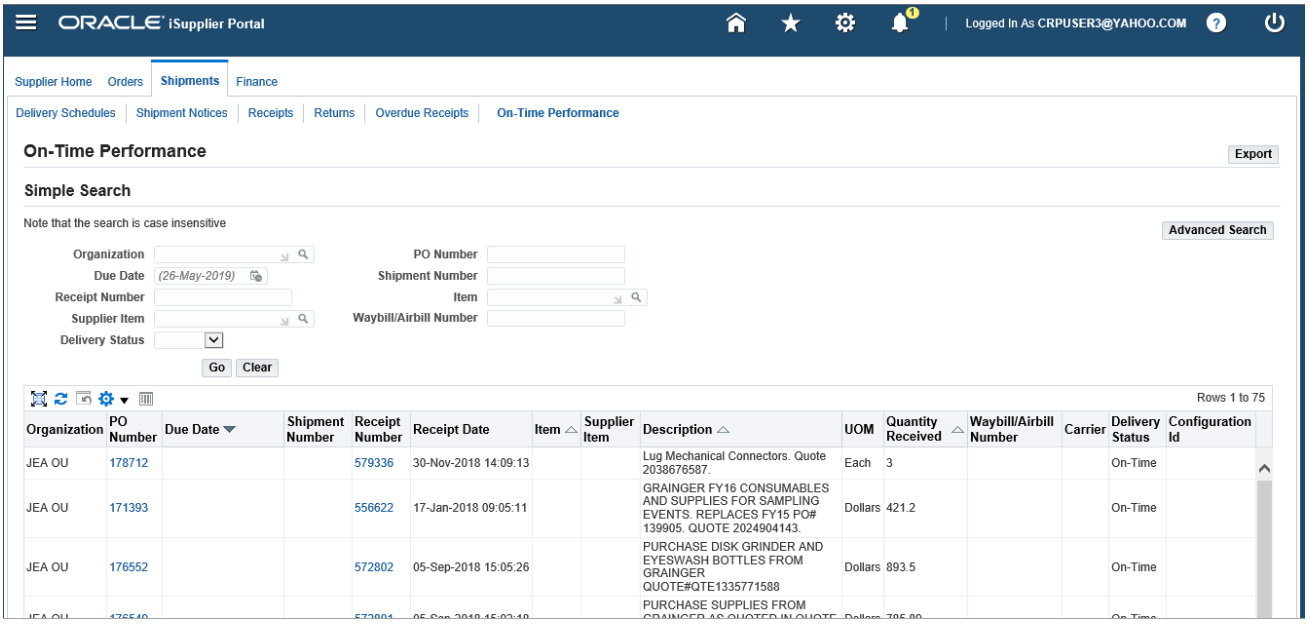
Perform simple or advanced search



On-Time Performance

The On-Time Performance page provides the delivery status of shipments you made against purchase orders. You can view your performance for timeliness of deliveries. Click the PO Number and Receipt Number to view further details.

1. Click on On-Time Performance link
2. Perform simple or advanced search



Invoice and Payments

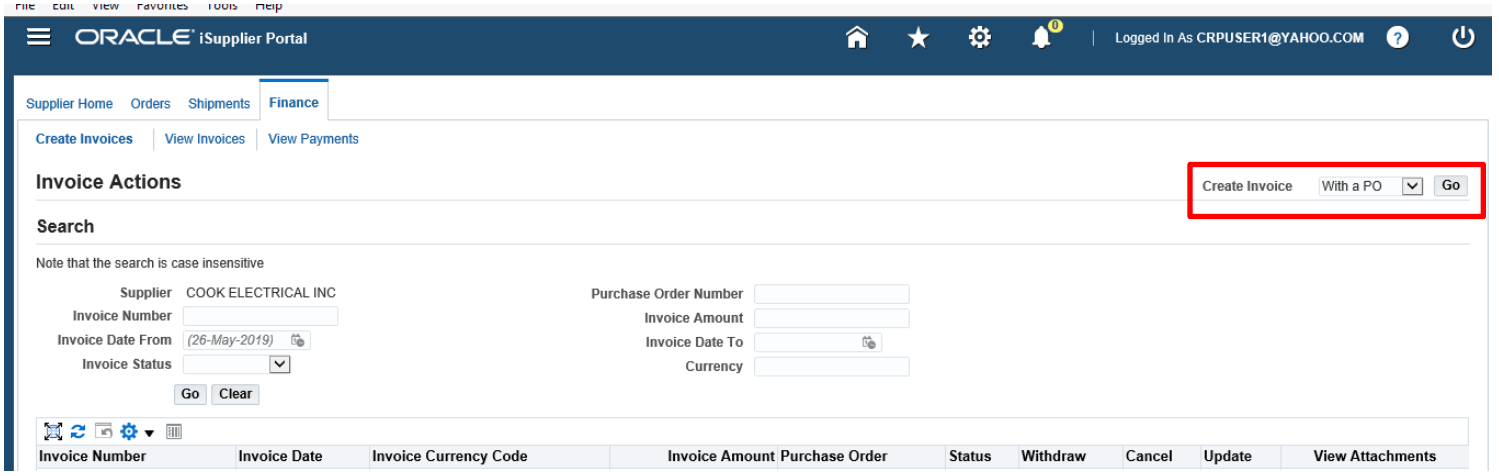
You can access invoice and payment information as well as review invoice status online using Oracle iSupplier Portal. If the invoice is associated with a Purchase Order, the invoice can be submited online.

Creating Invoices

You can submit an invoice online to JEA based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard or blanket purchase orders that are not fully billed. You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders.

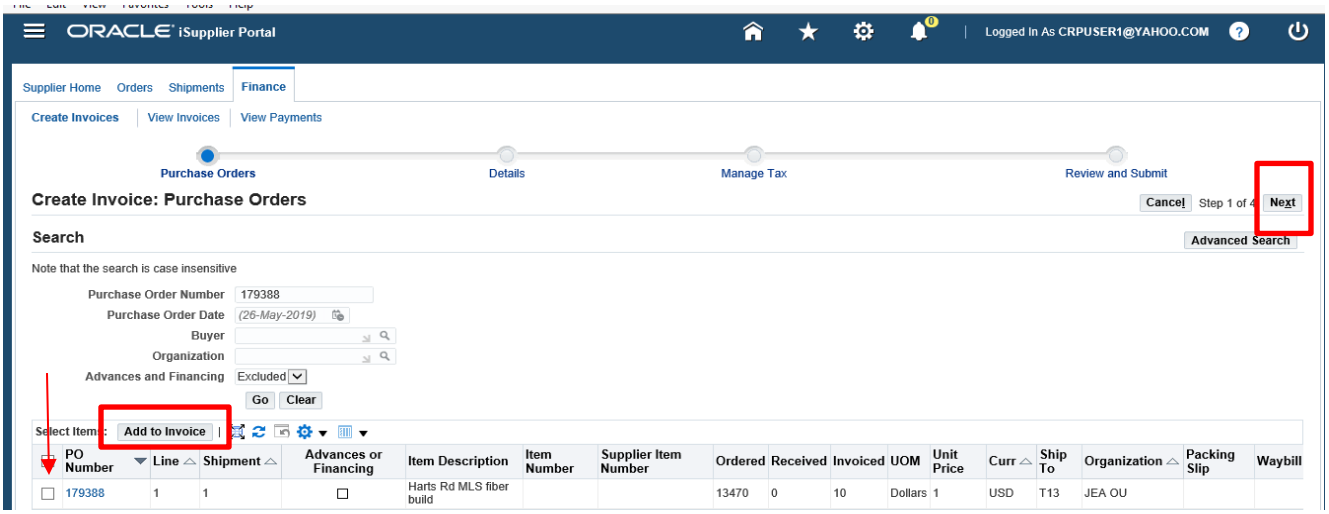
To submit an invoice with a matching purchase order:

Click the Finance tab, and then click Create Invoices in the task bar directly below the tabs. On the Invoice Actions page, select Create invoice With a PO and click Go.

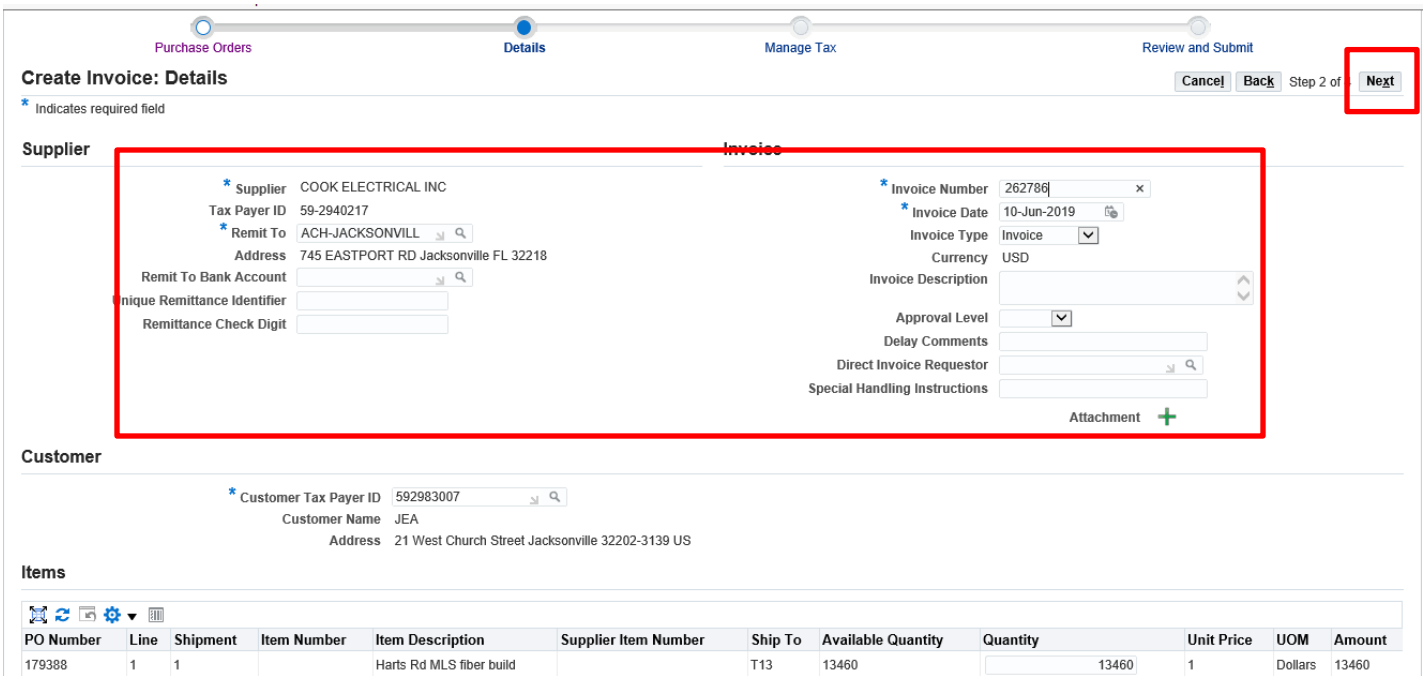


On the Create Invoice: Purchase Orders page, enter search criteria to identify the purchase order and click go.

Select items of the PO to be invoiced and click Add to Invoice. Add as many items as you need (items on your invoice display at the bottom of the page). If you mistakenly add an item to the invoice, you can select it and click Remove from invoice.
When finished adding items, click Next.

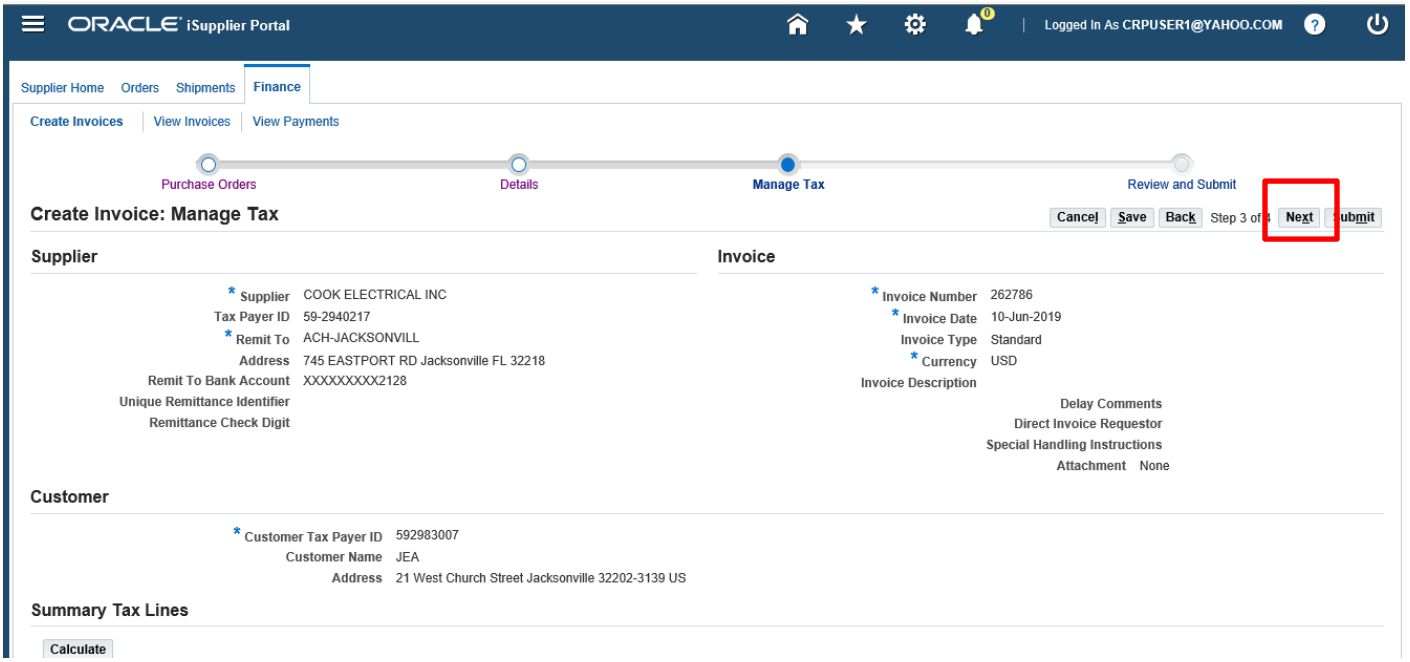


On the Create Invoice: Details page, enter an invoice number and remit to address (if it does not default.) then click Next.

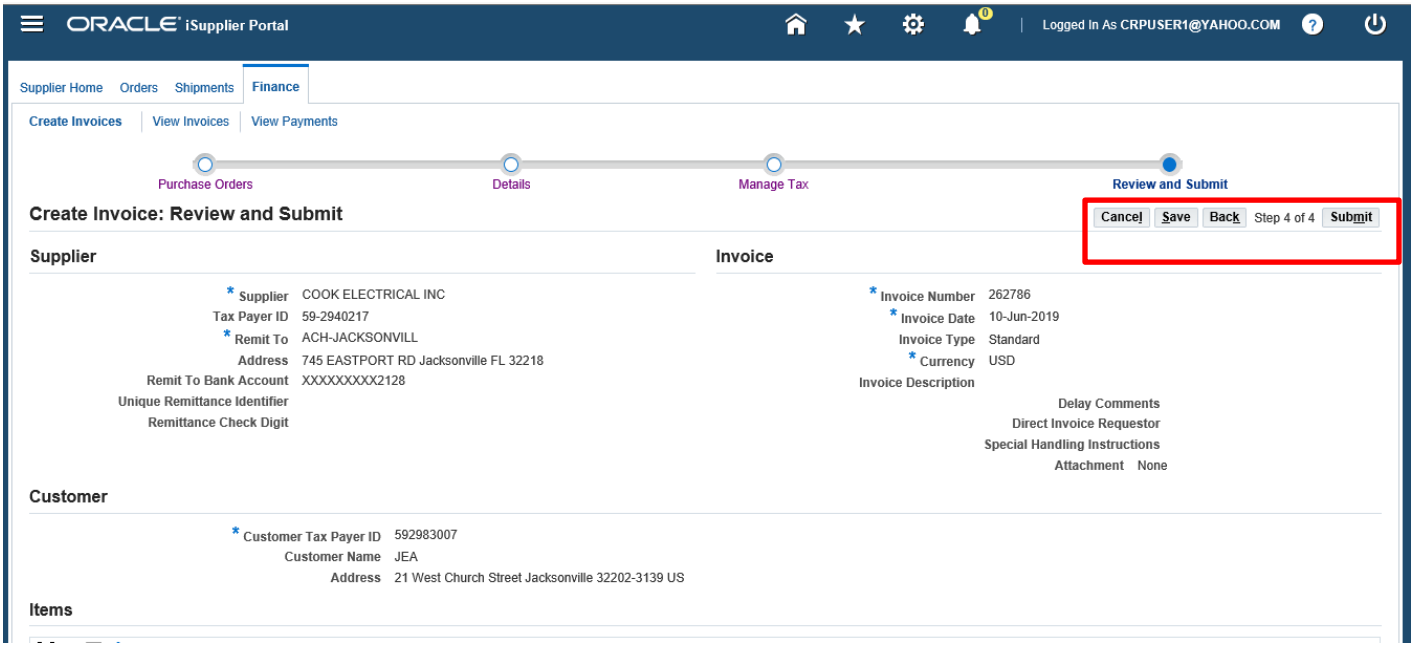


On the Create Invoice: Manage Tax page, you can view the tax information generated, as it is based off the tax amount you entered on the invoice header.

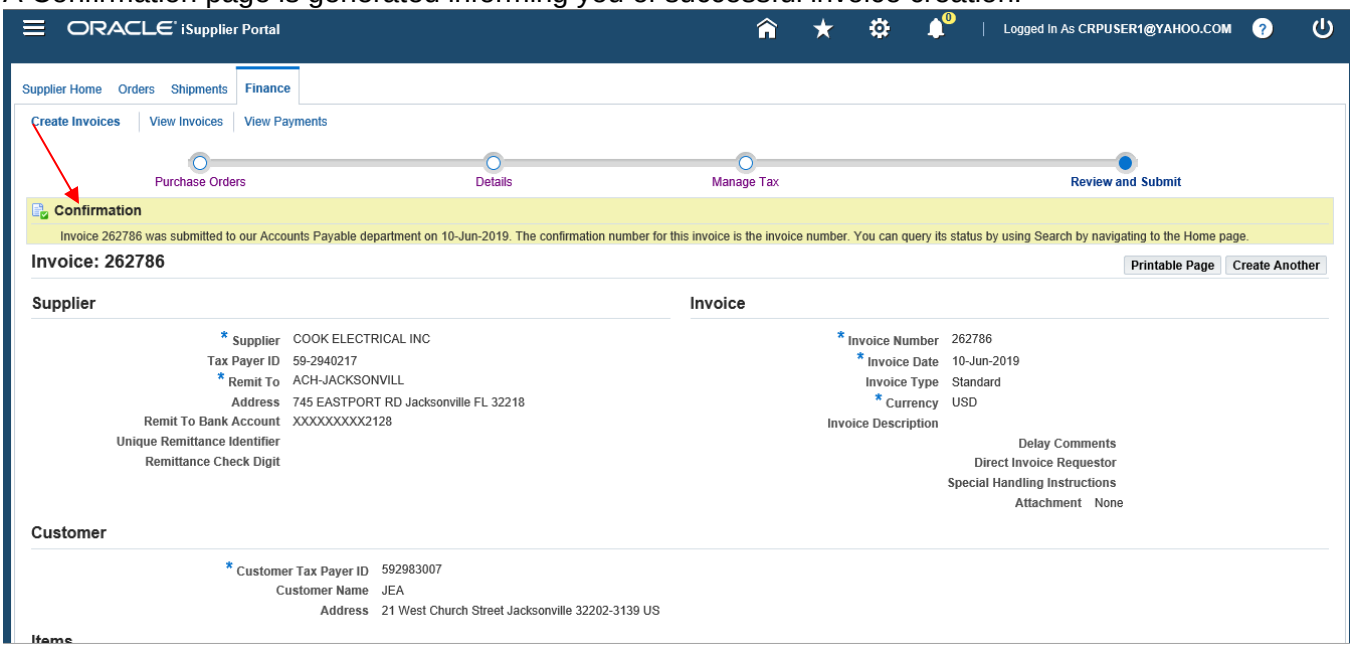
When finished, click Next.



On the Create Invoice: Review and Submit page, review your invoice and click Submit. You also have the option to return to this invoice later by clicking Save for Later.



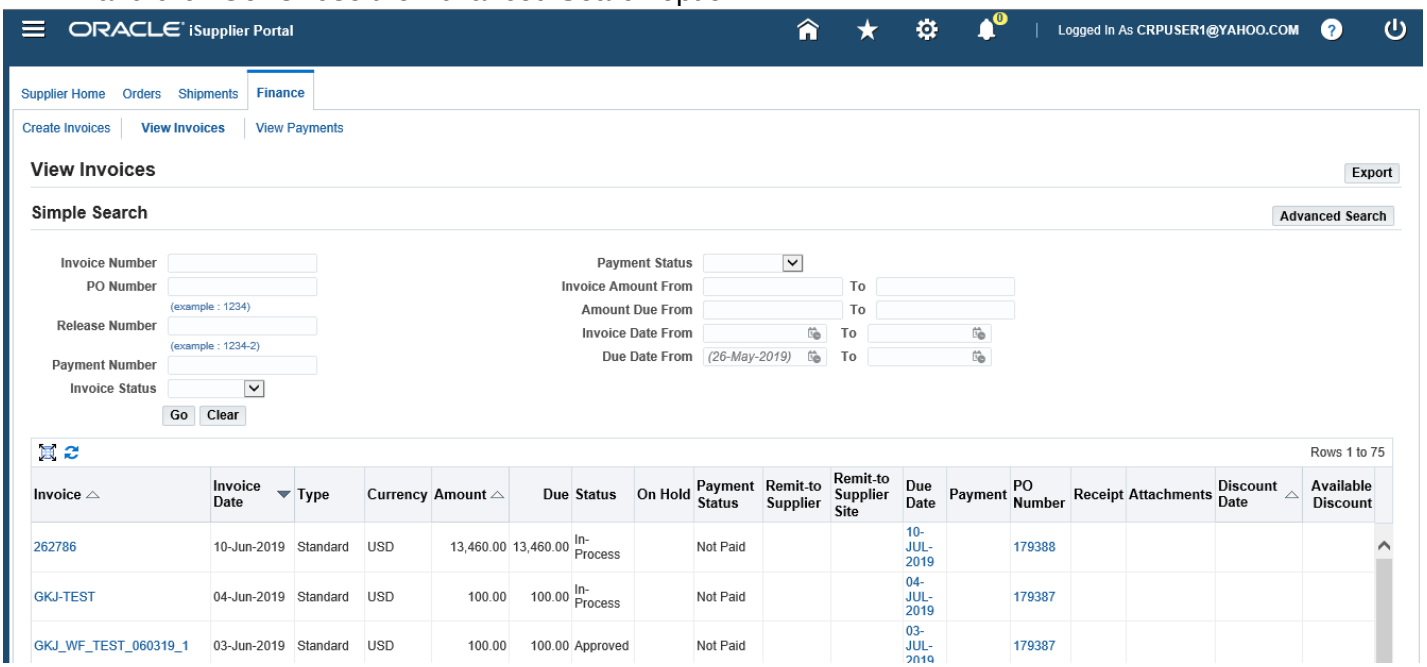
A Confirmation page is generated informing you of successful invoice creation.



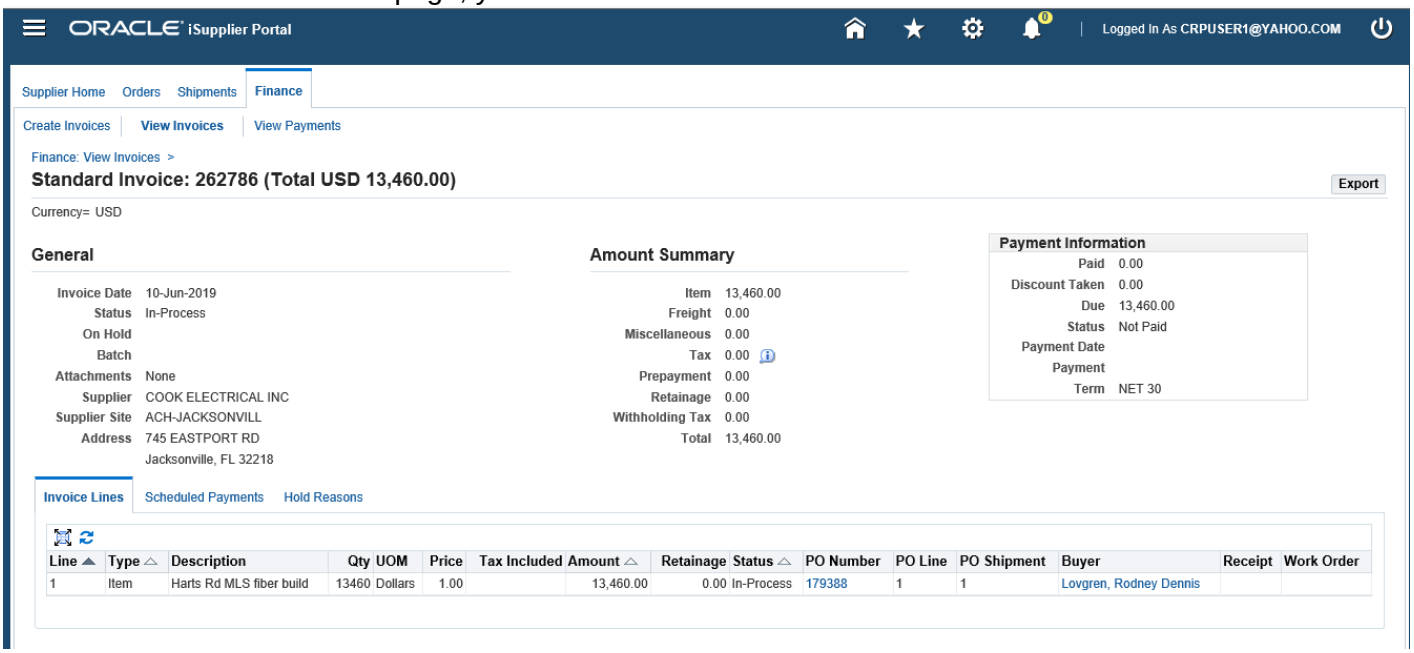
Viewing Invoices

To view invoice information:

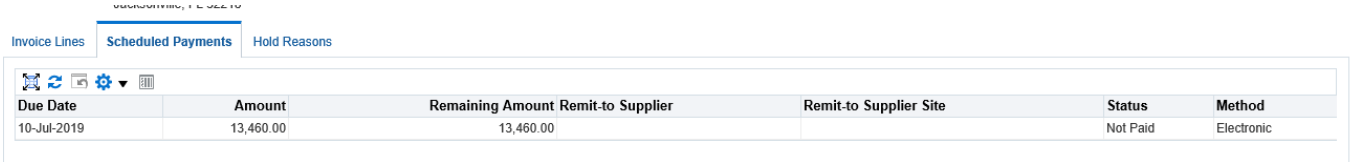
1. On the iSupplier Portal Home page, click the Finance tab, then click the View Invoices subtab.
2. On the View Invoices page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.



3. When the search results display, click the invoice number link to view details of the invoice. (You can also view any associated purchase order(s), payments, or scheduled payments by clicking their links).
4. On the Invoice Details page, you can see the header level information.



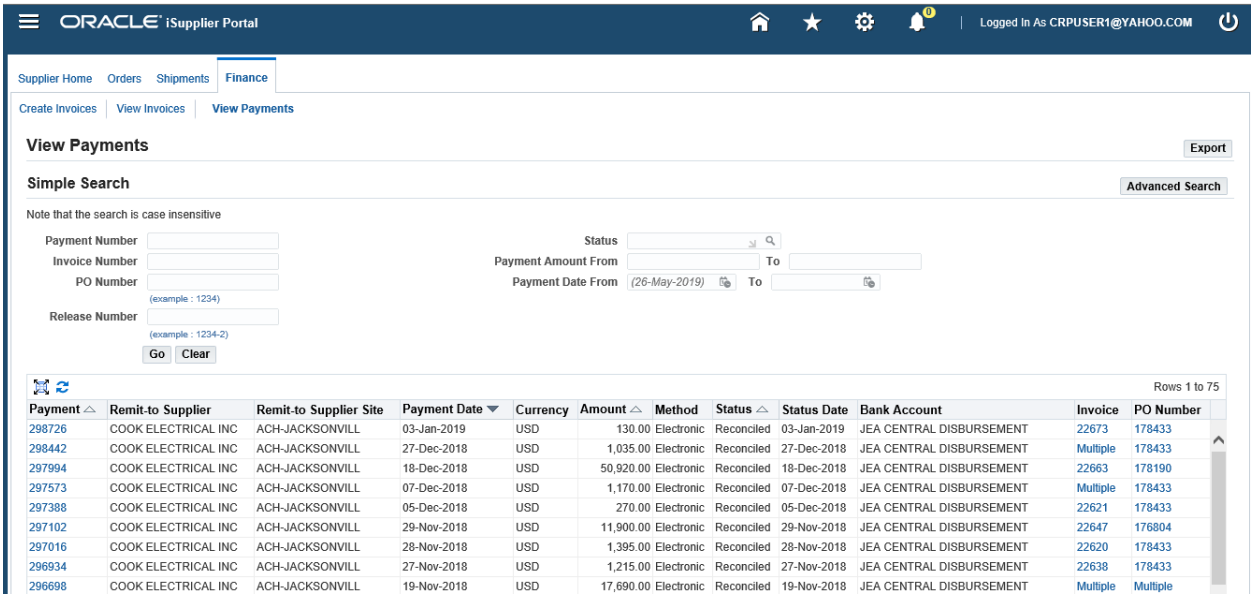
5. To view invoice line information, click the Invoice Lines tab. You can also view any scheduled payments and any hold information



Viewing Payments

To view payment information:

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Payments subtab.
2. On the View Payments page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.
3. When the search results display, click the payment number link to view details of the payment. (You can also view any associated purchase order(s), or invoices by clicking their links).
4. On the Payments details page, you can see the payment details including the invoices addressed by the payment.



Payment	Remit-to Supplier	Remit-to Supplier Site	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
298726	COOK ELECTRICAL INC	ACH-JACKSONVILL	03-Jan-2019	USD	130.00	Electronic	Reconciled	03-Jan-2019	JEA CENTRAL DISBURSEMENT	22673	178433
298442	COOK ELECTRICAL INC	ACH-JACKSONVILL	27-Dec-2018	USD	1,035.00	Electronic	Reconciled	27-Dec-2018	JEA CENTRAL DISBURSEMENT	Multiple	178433
297994	COOK ELECTRICAL INC	ACH-JACKSONVILL	18-Dec-2018	USD	50,920.00	Electronic	Reconciled	18-Dec-2018	JEA CENTRAL DISBURSEMENT	22663	178190
297573	COOK ELECTRICAL INC	ACH-JACKSONVILL	07-Dec-2018	USD	1,170.00	Electronic	Reconciled	07-Dec-2018	JEA CENTRAL DISBURSEMENT	Multiple	178433
297388	COOK ELECTRICAL INC	ACH-JACKSONVILL	05-Dec-2018	USD	270.00	Electronic	Reconciled	05-Dec-2018	JEA CENTRAL DISBURSEMENT	22621	178433
297102	COOK ELECTRICAL INC	ACH-JACKSONVILL	29-Nov-2018	USD	11,900.00	Electronic	Reconciled	29-Nov-2018	JEA CENTRAL DISBURSEMENT	22647	176804
297016	COOK ELECTRICAL INC	ACH-JACKSONVILL	28-Nov-2018	USD	1,395.00	Electronic	Reconciled	28-Nov-2018	JEA CENTRAL DISBURSEMENT	22620	178433
296934	COOK ELECTRICAL INC	ACH-JACKSONVILL	27-Nov-2018	USD	1,215.00	Electronic	Reconciled	27-Nov-2018	JEA CENTRAL DISBURSEMENT	22638	178433
296698	COOK ELECTRICAL INC	ACH-JACKSONVILL	19-Nov-2018	USD	17,690.00	Electronic	Reconciled	19-Nov-2018	JEA CENTRAL DISBURSEMENT	Multiple	Multiple

JEA iSupplier Profile Manager

This responsibility is perhaps one of the most important of our iSupplier offerings. Thanks to the self-service capabilities of the iSupplier Portal, Supplier Users can maintain and update their profile directly within the tool without having to depend on any external support.

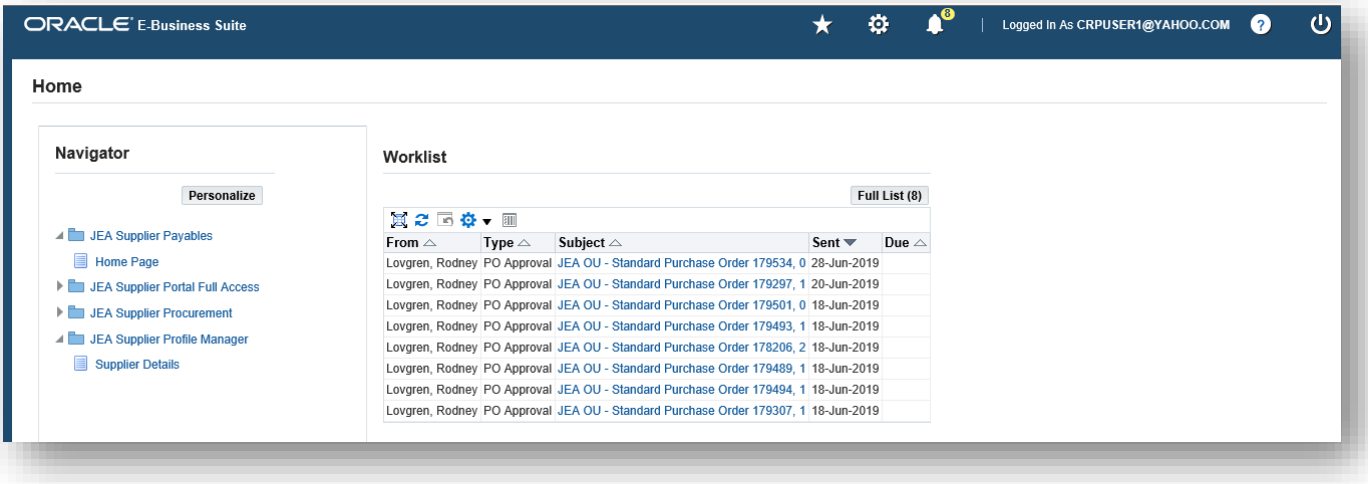
Supplier Users can update details like their address, contact number, bank account, etc. *Please note that changes and updates to banking information will only be accessible through the JEA Supplier Profile Banking responsibility, which will only be granted to authorized users.

Any changes made by the Supplier User will go through a review and approval process by JEA. Once the requested change is approved, the supplier profile will be updated and reflect within the iSupplier Portal.

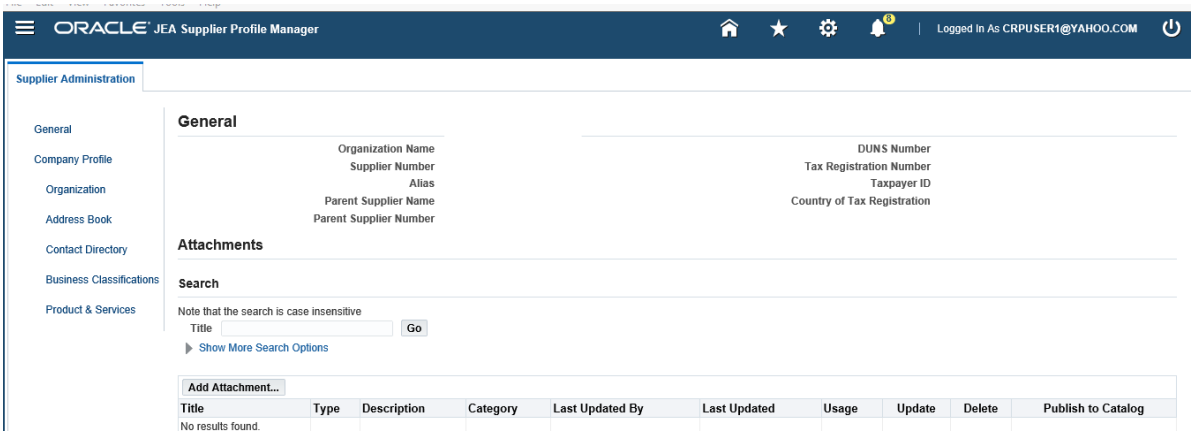
It is the Supplier User's responsibility to ensure that the data inputted is accurate and approved by the appropriate company representative with the proper level of authority, within their organization.

To access the JEA Supplier Profile Manager responsibility:

- ⇨ Log into Oracle
- ⇨ Click on JEA Supplier Profile Manager
- ⇨ Click on Supplier Details



The page will open to the main page, showing the **General** tab information.

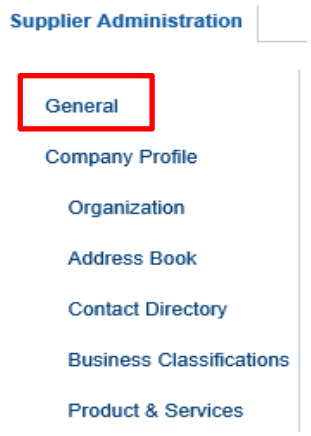


The Supplier User can access the following options to make changes to their company's information:

- ⇨ General
- ⇨ Organization
- ⇨ Address Book
- ⇨ Contact Directory
- ⇨ Business Classifications
- ⇨ Products & Services

General

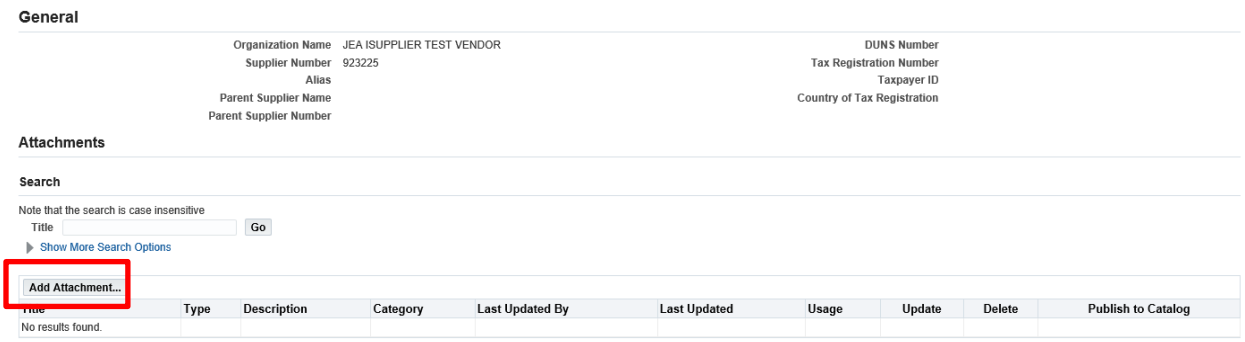
Select **General**.



The General page will list the Organization Name, Supplier Number, Tax ID and any supporting documents attached to the profile. The following documents are required for all Suppliers:

- ⇨ Current W-9
- ⇨ Current Certificate of Insurance
- ⇨ Vendor Request Form (New Vendors)
- ⇨ ACH Enrollment Form

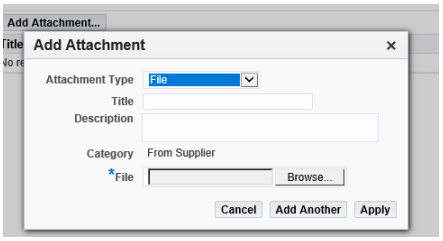
To attach a document, select **Add Attachment**.



Make the appropriate selections:

- ⇨ **Attachment Type**
  - **Select** - File, URL, Short Text, Long Text or Document Catalog
- ⇨ **Title**
  - Enter an appropriate **Title** for your attachment, i.e. W9, COI (Certificate of Insurance), Vendor Form, ACH Form, etc.
- ⇨ **Description**
  - Add a **Description** for the attachment. This field is optional.
- ⇨ **File**
  - Click the **Browse** button and select your attachment.

Click **Apply.** You will receive a confirmation message about adding the attachment.



Organization

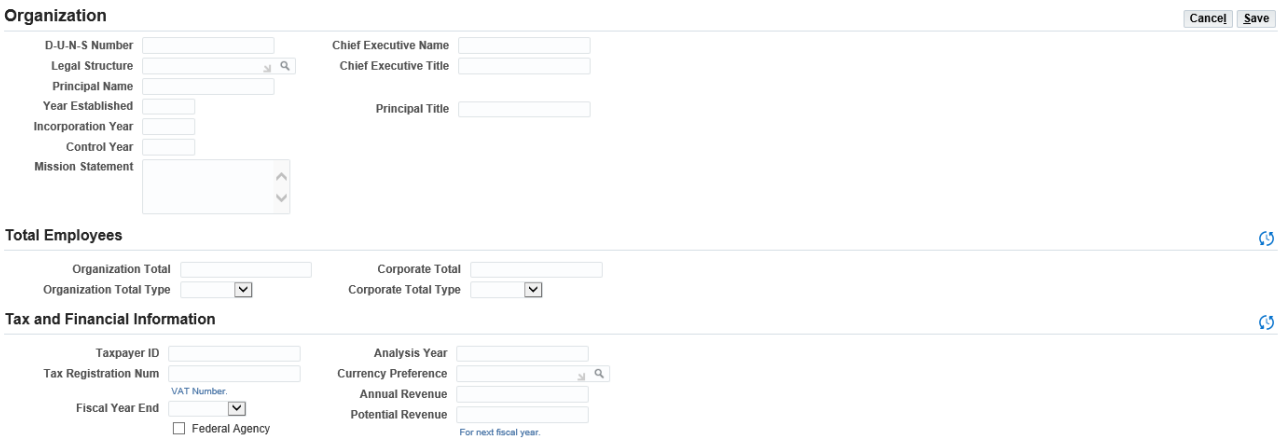
Select **Organization**.

The fields listed under the **Organization** and **Total Employees** areas is optional. This information is not required to complete the supplier profile.

In the **Tax and Financial Information** area, please complete the following required field or modify as needed:

- ⇨ **Taxpayer ID**
- ⇨ All other fields under this section are optional.

Click **Save**.



Address Book

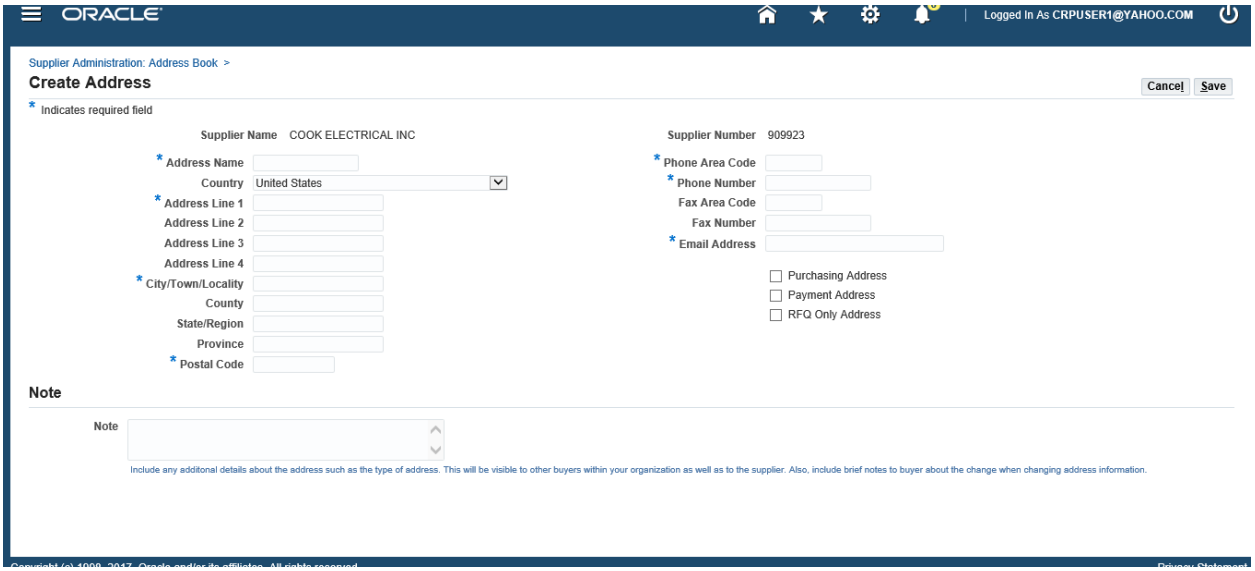
Select **Address Book**.

Select **Create**.

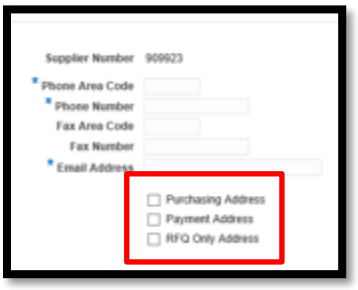
The **Create Address** page will open.

Fill in the following required fields using “ALL CAPITAL LETTERS”:

- ⇨ **Address Name**
- ⇨ **Address Line 1**
- ⇨ **City/Town/Locality**
- ⇨ **Postal Code**
- ⇨ **Phone Area Code**
- ⇨ **Phone Number**
- ⇨ **Fax Area Code**
- ⇨ **Fax Number**
- ⇨ **Email Address**

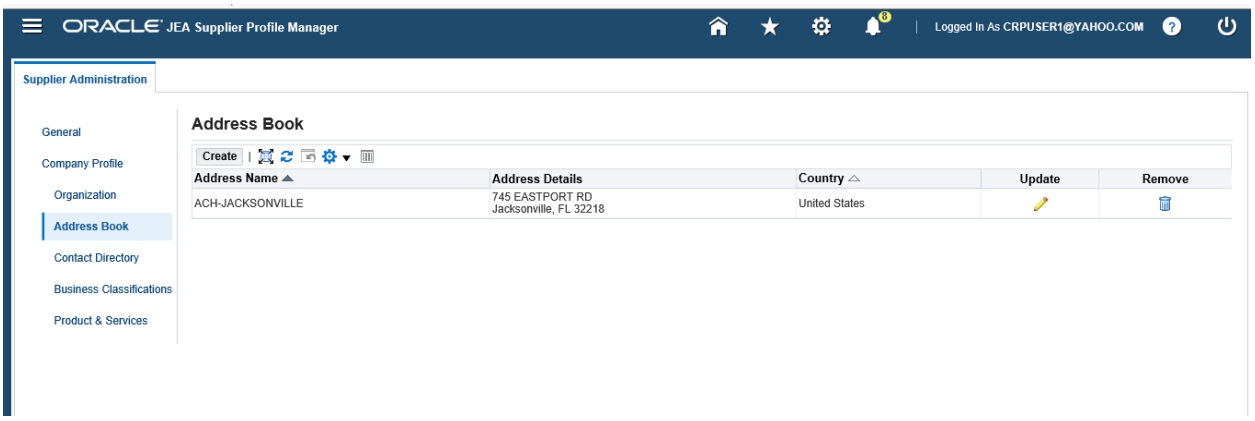


The option to mark the address as a “**Purchasing Address**”, “**Payment Address**” or “**RFQ Only**” is available. Please check the applicable box or boxes.

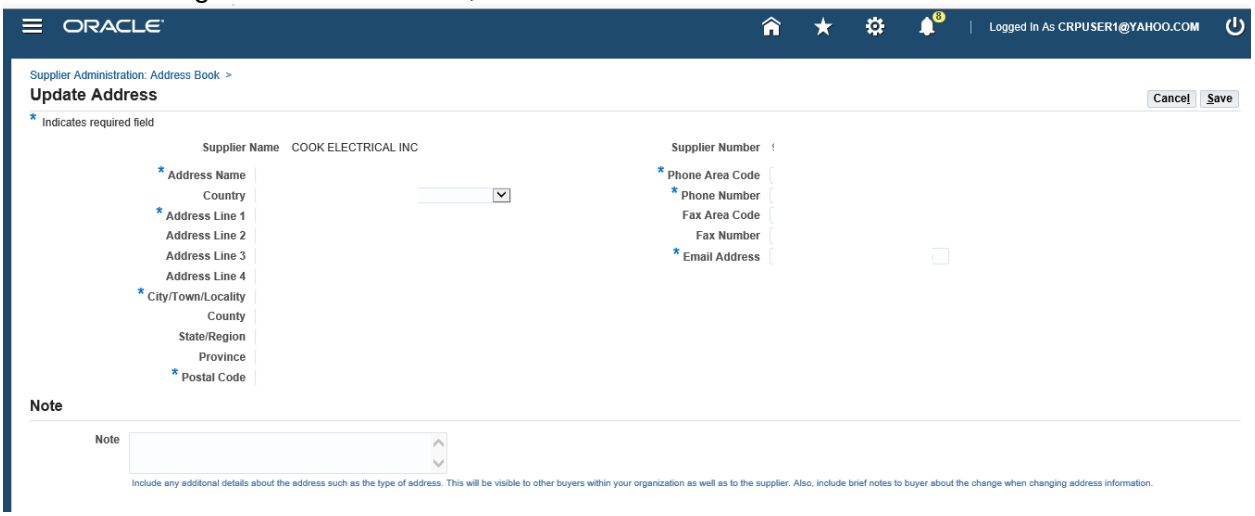


Click **Save**. You will receive a confirmation message about adding the address.

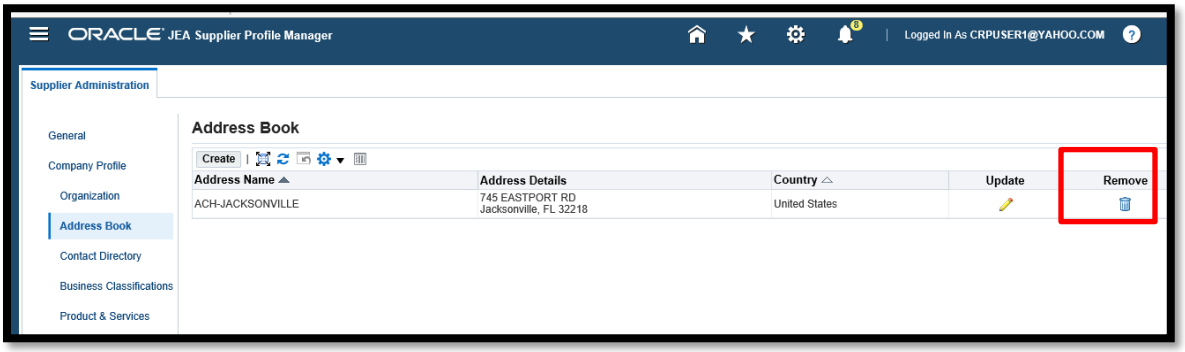
To update an address, on the **Address Book** tab page, select the **Update Pencil** icon.



The **Update Address** page will open. There you can make any necessary changes needed. Once the changes have been made, click **Save**.

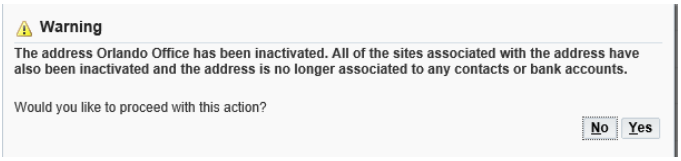


To submit a request to remove an address, on the **Address Book** tab, select the **Remove Garbage Can** icon next to the address you would like to remove.



You will then receive a warning message about the address removal.

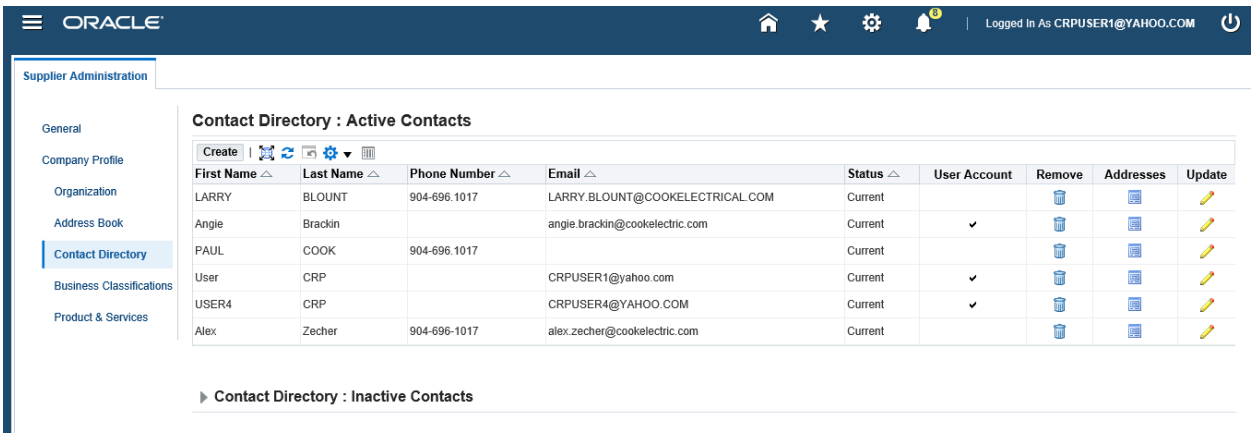
- ⇨ Select **Yes** if you would like to proceed with the action.
- ⇨ Select **No** if you would like to cancel the action.



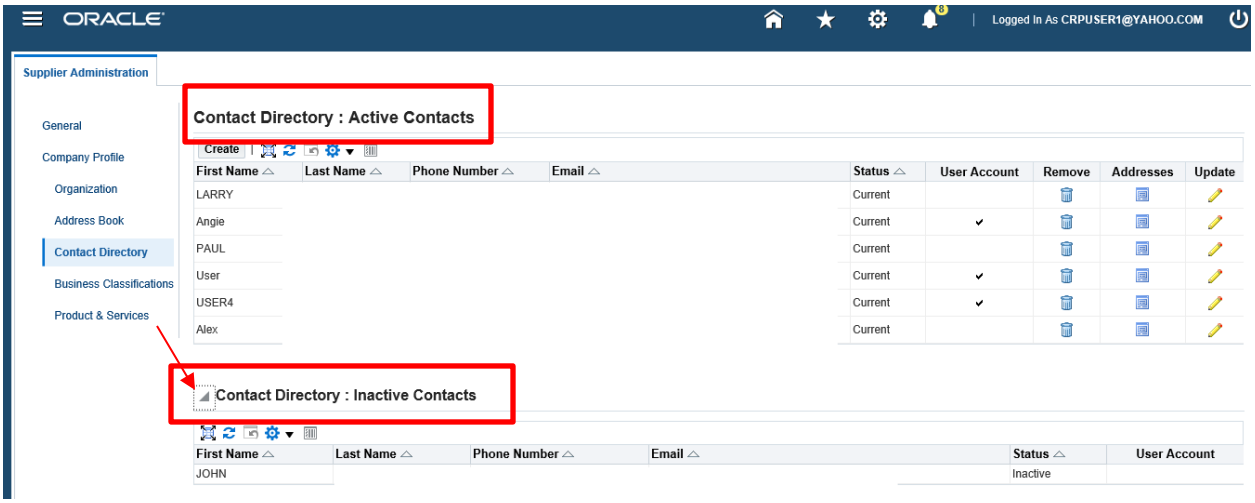
You will receive a confirmation message about removing the address.

Contact Directory

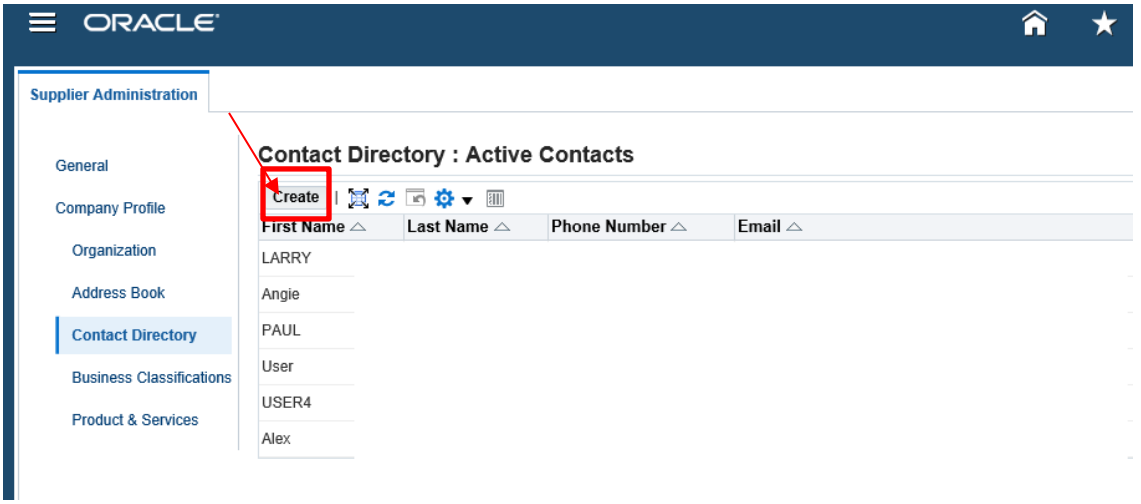
You can view, remove or add contacts to the **Contact Directory**.



1. All active contacts all listed under the **Active Contacts** Header
2. To view inactive Contacts, contacts that were in the past active but have been removed, click the gray triangle to the right of the **Inactive Contacts** Header



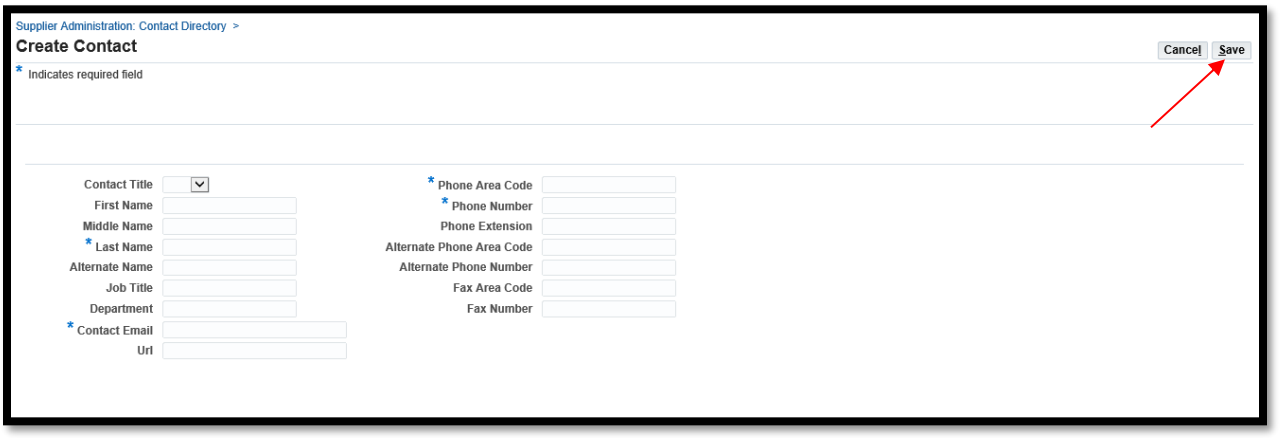
To create a new contact, select the **Create** box under the **Active Contacts**.



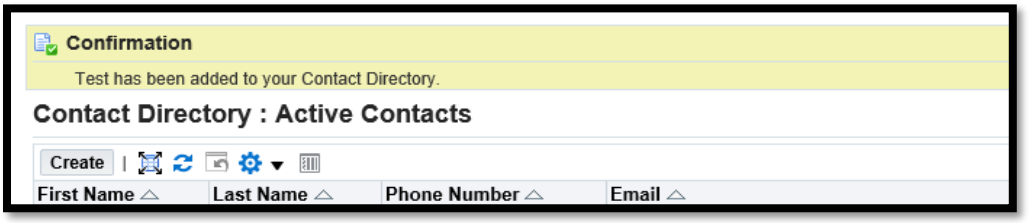
The **Create Contact** page will open. Fill in the following required fields:

- ⇨ **Last Name**
- ⇨ **Contact Email**
- ⇨ **Phone Area Code**
- ⇨ **Phone Number**

Once the information has been added in the fields, click **Save** in the top right corner.

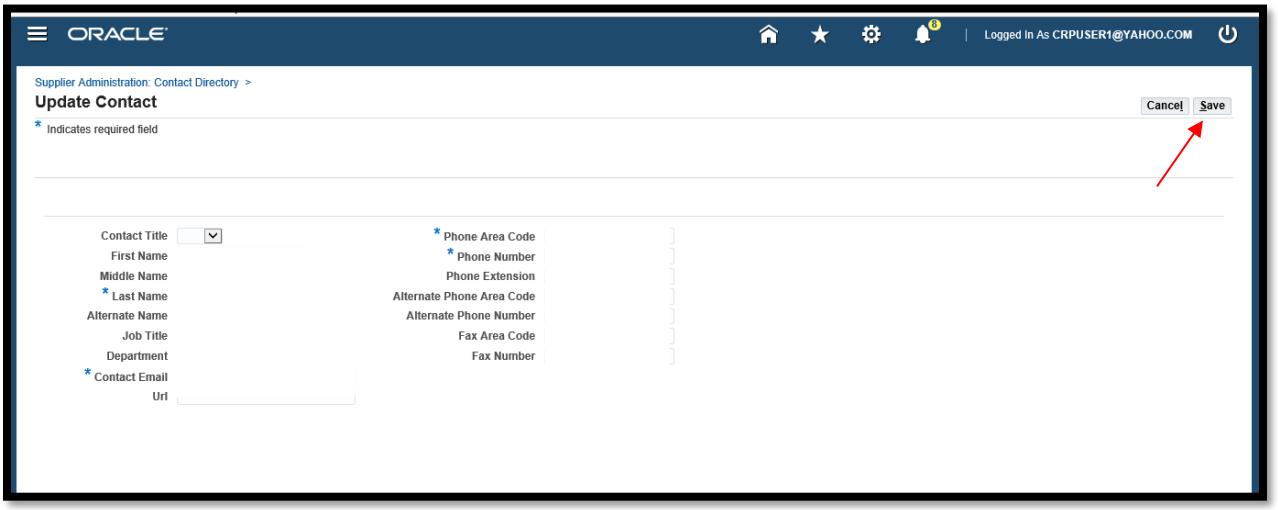


You will be returned to the **Contact Directory** page and a confirmation for the new contact will be received.

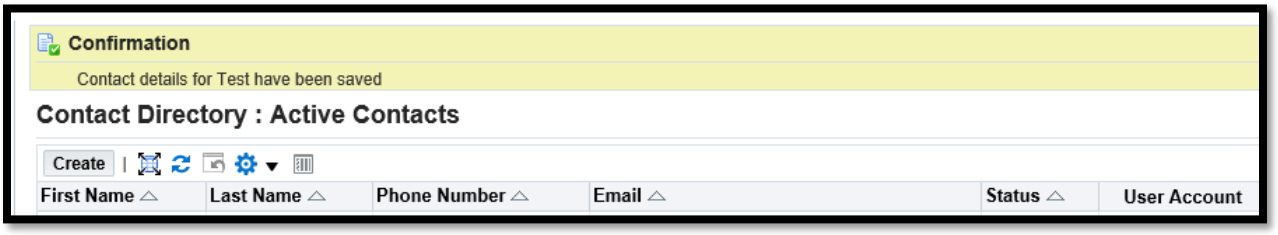


To update a contact: click the yellow **Update Pencil** icon for the contact you want to update

The **Update Contact** page will open. Update the information you wish to change. Then click **Save** in the top right corner.



Once you click Save. You will be returned to the **Contact Directory** page and receive a confirmation message that the update has been saved.



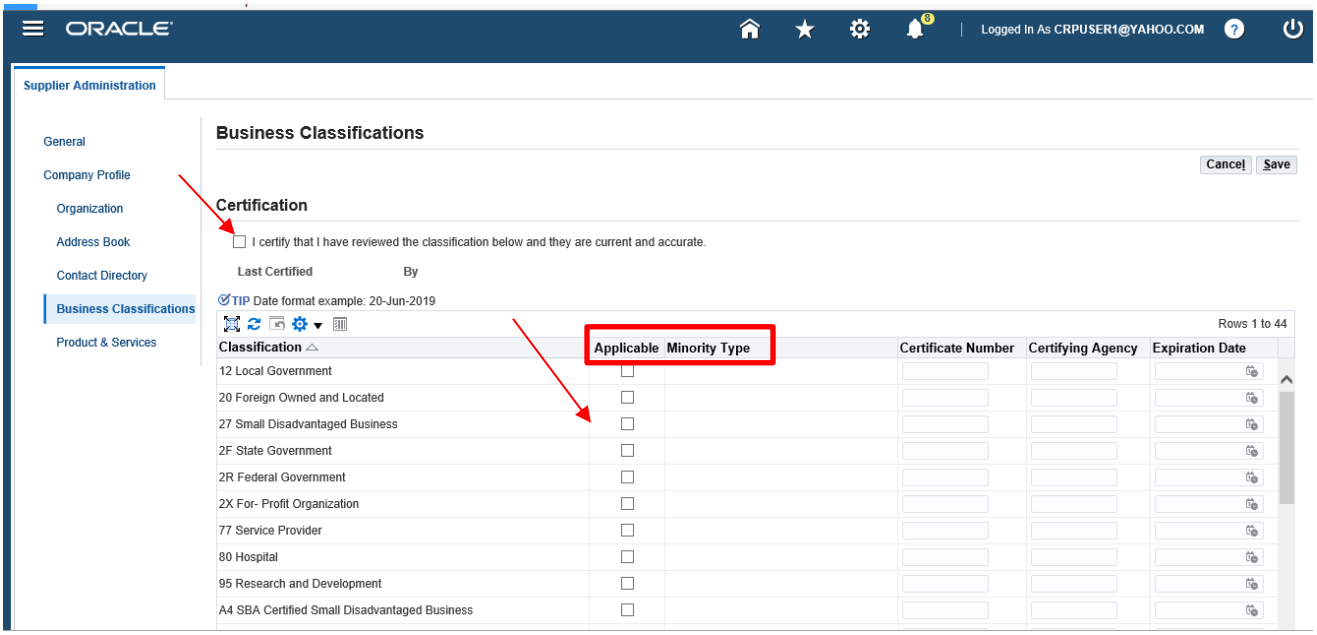
Business Classifications

The **Business Classifications** area is used to capture all of your organization certifications.

Start by checking the box stating, “I certify that I have reviewed the classification below and they are current and accurate.”

To choose the applicable business classifications, check the appropriate box or boxes. For each item, provide the Certificate Number, Certifying Agency and Expiration Date.

Click **Save**.

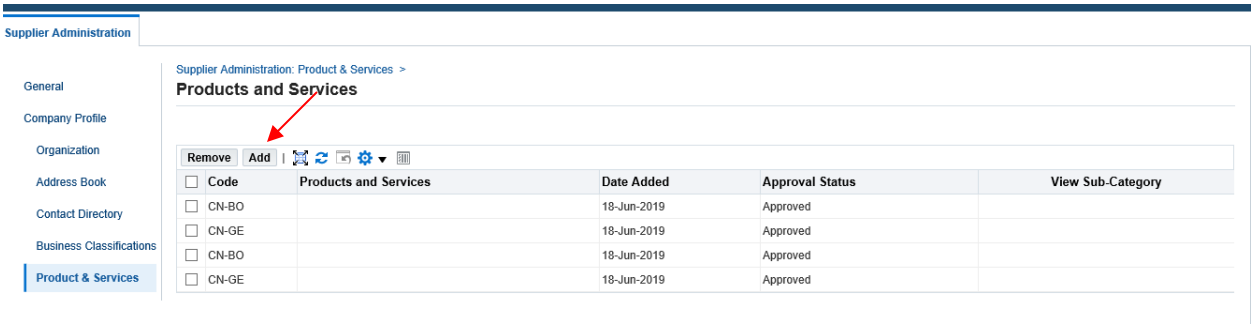


You will receive a confirmation for this change/addition once complete.

Product & Services

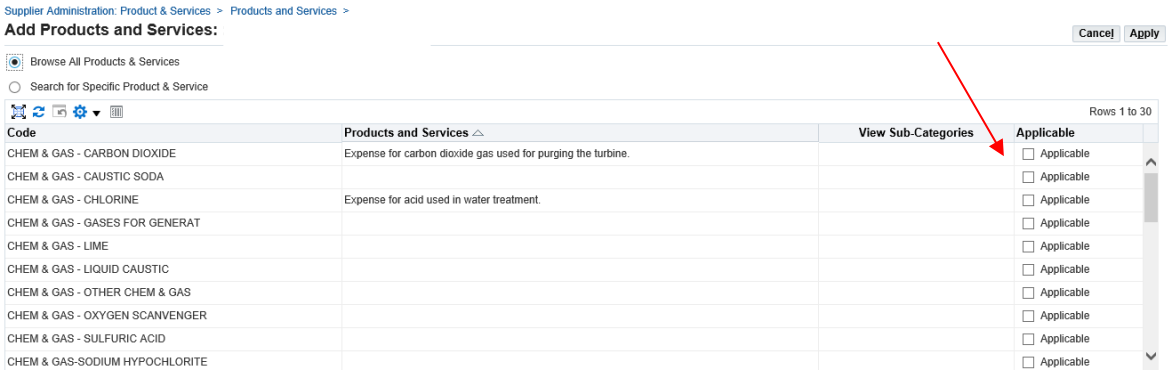
The **Product and Services** area lists the products and services your company provides.

To add a Product or Service, click **Add**.

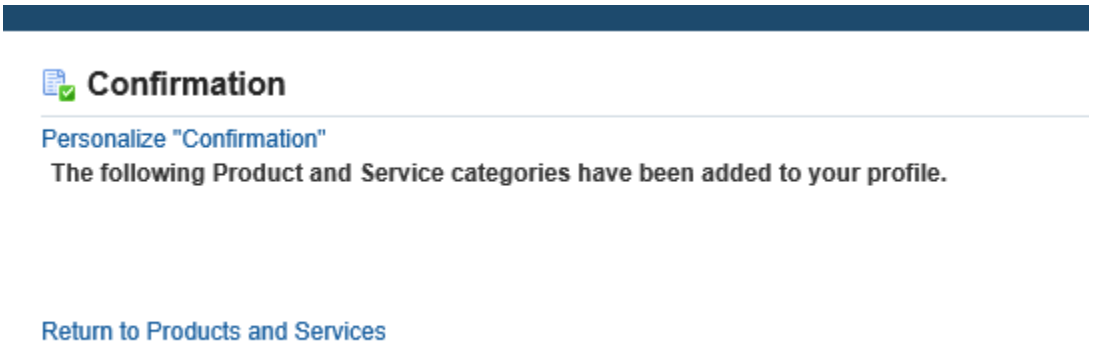


All the options for the available products and services will open on the next page.

Check all applicable products or services that apply to your company. Then click **Apply.**

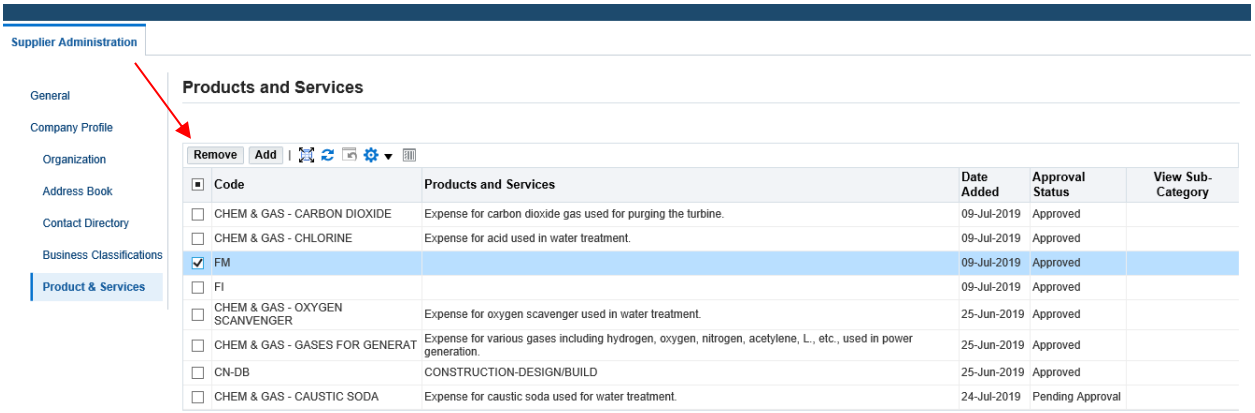
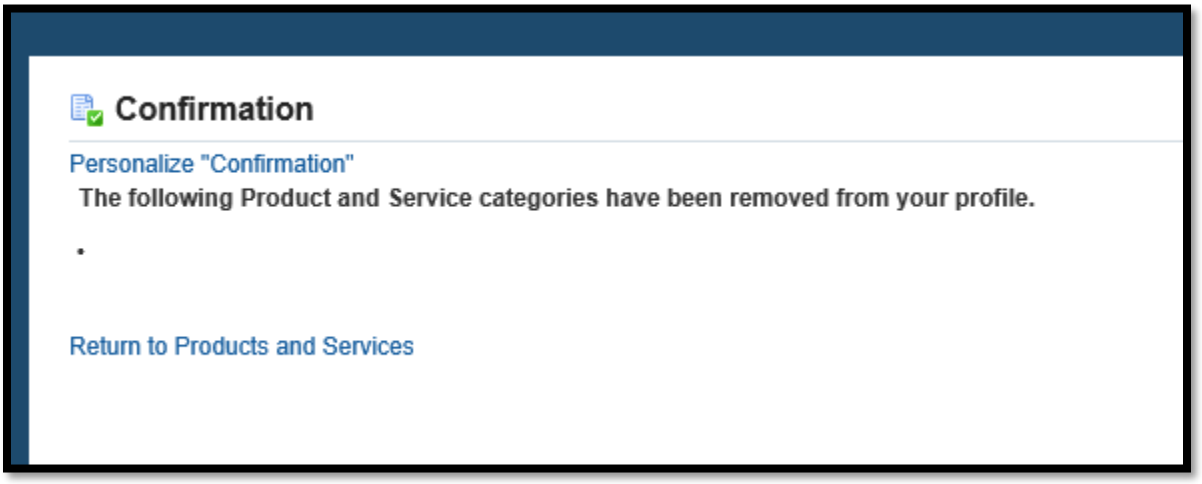


You will receive a confirmation notification.



To remove a product and service, select the product or service you would like to remove.

Click **Remove**.



You will receive a confirmation notification.