

**iSupplier and Sourcing**

**External User Training Guide**

**Visa USA Strategic Sourcing**

**Version Date: November 24, 2007**

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## Overview

Oracle iSupplier Portal is a communication tool that enables Visa and its suppliers to communicate with each other throughout the procure-to-pay process. It allows suppliers to view and manage purchase orders, receipts, invoices and delivery schedules in a real-time system that is available 24 hours a day, 7 days a week (24x7).

Benefits associated with using iSupplier include:

- Offers suppliers an integrated experience by providing access to purchase orders (POs), invoices and payments in one location.
- Improved efficiency by decreasing the number of calls between suppliers and Accounts Payable.
- Provides a central location for all PO information, and gives suppliers access to historical PO information.
- Increases on-time payment by using web invoicing which reduces time spent tracking down delayed or held payments.
- Eliminates mail float. When invoices are entered online, Visa receives them immediately.
- Enhances the visibility of the transactions that occur between Visa and its suppliers.

## Help and Support

The Supplier User Guide and Frequently Asked Questions (FAQ) documents are available at: [www.visa.com/suppliers](http://www.visa.com/suppliers). For problems related to using iSupplier or logging into the portal, please email [StrategicSourcing@visa.com](mailto:StrategicSourcing@visa.com) or call (650)-432-7867.

## User Registration

To use iSupplier, users must first be registered with Visa. The Visa Buyer can invite a supplier user to register. They can also register the users directly.

Invited suppliers will receive an email notification from Visa.

From: Oracle Workflow - CTRL [vfssupportservices@visa.com] Sent: Wed 10/24/2007 5:53 PM  
To: POS\_REG\_66  
Cc:  
Subject: FYI: "Visa" iSupplier Portal: Invitation to Register  
Attachments: Notification Detail.html (452 B)

To: POS\_REG\_66  
Sent: 25-OCT-07 00:52:22  
ID: 933897

You have been invited to register with "Visa" for access to their supplier collaboration network.

You can access the registration page by clicking the following [link](#). You will be asked to provide additional contact information before submitting your registration request.

If necessary, you can forward this invitation to a colleague in order that they can complete the registration process.

Test in control - invite supplier

For additional information regarding the Visa iSupplier portal, please visit [Visa iSupplier Web Page](#).

Thank you.

To respond to the invitation, click on the link in the body of the email. Read the notice on the registration page. If this is acceptable, provide all the information requested on the form and click on Submit.

Respond to Invitation

You have been invited to register. Please complete the registration form and then click the submit button

Cancel Submit

\* Indicates required field

My Company Details

Company Name

By registering and accessing any services on Visa's iSupplier Portal you are representing that: (i) you are an authorized representative of the company set forth above and authorized to register and access Visa's iSupplier Portal on your company's behalf; (ii) you will comply with the terms and conditions established by Visa governing use and access, as established by Visa from time to time; (iii) you will not attempt to exceed your scope of permitted access; (iv) you will not share your account name or password with any person. If you are not willing or able to acknowledge the foregoing, please do not register to access this Portal.

The information furnished herein is CONFIDENTIAL and is to be used solely to support Visa programs. This information shall not be published or disclosed in whole or in part, without the prior written permission of Visa.

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My Profile

Enter your information. Your email address will be your Username for the system.

\* Email Address ccarlson@visa.com

Email address will be used as the Username.

Contact Title

\* First Name

Middle Name

\* Last Name

\* Job Title

\* Phone

Extension

Fax

Cancel Submit

After you submit your information, you will receive a confirmation message.

Confirmation

Thank you for registering with Visa for access to the iSupplier Portal. Your request has been submitted for review and approval.

Close

Once the registration request is approved, the user will receive an encrypted message containing the username and password.

Attachments: securedoc.html (154 KB)

**You have received a secure message**

You have received a secure email message that is encrypted using PostX technology.

To open the message, open the attachment securedoc.html.

First time users: If this is the first secure email message you have received, you will be prompted to register to create an account and establish your password. Your password will be used to open this email and all other secure email sent from the same company.

Mobile device users: Forward this message to mobile@pxmail.com. You will receive an email containing a link to a page where you can enter your password and view the secure message.

Questions? If you have questions about this email or the registration process, contact the sender.

Click on the attachment to retrieve the username and password. For more information on PostX, please visit the supplier website at [www.visa.com/suppliers](http://www.visa.com/suppliers). You can also contact your Visa buyer or Strategic Sourcing for questions regarding the registration process.

## Login to iSupplier

Once registered, users can log on to iSupplier and view transactions which occur between the

supplier and Visa.

To login to iSupplier, go to URL: <https://procurement.visaonline.com>. Please add this link to your *Favorites* for easy access in the future.



### Login

Username   
Password

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Type in your Username and Password then click on the Login button. Passwords are case sensitive. You will be prompted to change your password the first time you log in to the system.

## iSupplier and Sourcing Responsibility Matrix

There are 7 different responsibilities in iSupplier and Sourcing that can be assigned to external users.

- a. Visa iSupplier Inquiry
- b. Visa iSupplier Contact Directory
- c. Visa iSupplier Classifications
- d. Visa iSupplier Invoicing
- e. Visa iSupplier Address Book
- f. Visa iSupplier Bank Accounts
- g. Visa Sourcing Supplier

The Home Page lists the various responsibilities that have been assigned to you. If you do not see the responsibility, you were not given the access. Please email [StrategicSourcing@visa.com](mailto:StrategicSourcing@visa.com) to inquire about additional access.



[Diagnostics](#) | [Logout](#) | [Preferences](#) | [Help](#)

Logged In As STEEL

### Worklist

From	Subject	Sent
There are no notifications in this view.		

[TIP](#) [Vacation Rules](#) - Redirect or auto-respond to notifications.

### Navigator

<ul style="list-style-type: none"><li><input type="checkbox"/> VISA iSupplier Address Book</li><li><input type="checkbox"/> VISA iSupplier Bank Accounts</li><li><input type="checkbox"/> VISA iSupplier Classifications</li><li><input type="checkbox"/> VISA iSupplier Contact Directory</li><li><input type="checkbox"/> VISA iSupplier Inquiry</li><li><input type="checkbox"/> VISA iSupplier Invoicing</li><li><input type="checkbox"/> VISA Sourcing Supplier</li></ul>	Please select a responsibility.
--	---------------------------------

[Diagnostics](#) | [Logout](#) | [Preferences](#) | [Help](#)

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[About this Page](#)

[Privacy Statement](#)

# Visa iSupplier Inquiry

Most users will have inquiry access to iSupplier. This responsibility provides users view only access to the supplier information, the ability to add and edit attachments to the supplier details and add contacts to the contact directory.

Click on the Visa iSupplier Inquiry responsibility.

**VISA E-Business Suite** [Logout](#) [Preferences](#) [Help](#)

Logged In As **HELLER**

**Worklist** [Full List](#)

**From** **Subject** **Sent**

There are no notifications in this view.

**TIP** [Vacation Rules](#) - Redirect or auto-respond to notifications.

**Navigator** [Edit Navigator](#)

Please select a responsibility.

- VISA iSupplier Address Book
- VISA iSupplier Bank Accounts
- VISA iSupplier Classifications
- VISA iSupplier Contact Directory
- VISA iSupplier Inquiry** ←
- VISA iSupplier Invoicing

[Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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## Visa iSupplier Inquiry Home Page

Once you click on Visa iSupplier Inquiry, the Inquiry Home Page is presented.

**VISA iSupplier Portal** [Home](#) [Logout](#) [Preferences](#) [Help](#)

**Home** **Orders** **Shipments** **Account** **Admin**

**C** Search PO Number

**D** **Notifications** [Full List](#)

**Subject** **Date**

No results found.

**E** **Orders At A Glance** [Full List](#)

**PO Number** **Description** **Order Date**

EP50067		10-Jul-2007 14:23:54
EP48939		08-Jun-2007 14:46:15
EP48810		06-Jun-2007 13:53:43

**F** **Orders**

- Purchase Orders
- Purchase History
- Receipts**
- Receipts
- Returns
- Invoices**
- Invoices
- Payments**
- Payments

[Home](#) | [Orders](#) | [Shipments](#) | [Account](#) | [Admin](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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(A) **Global Links:** Noted as A above, are available on all Oracle iSupplier pages.

**Home:** Returns users to the Visa E-Business Suite Navigator page where you can select another responsibility or application.

**Logout:** Logs you out of the Visa E-Business Suite. You will be automatically logged out of iSupplier if you are inactive for 60 minutes

**Preferences:** Allows you to set user preferences, including selecting a start page to automatically open when you log into the portal.

**Help:** Opens the Oracle iSupplier Portal Help.

(B) **Tabs:** Noted as B above, are used to organize pages by category. When you click on a tab, related page links are displayed on the blue taskbar that appears directly below the tab.

(C) **Search:** Noted as C above, enables you to jump directly to a specific purchase order, shipment, invoice or payment. To search;

1. Select a document type (purchase order, shipment, invoice or payment) from the drop-down list.
2. Enter the document number.
3. Click Go.

(D) **Notifications:** Noted as D above, displays the 5 most recent open notifications. Notifications are copies of the e-mail messages that users receive regarding the transactions that have occurred. Some notifications are view only, while others require action.

Click on a subject line to view the notification.

Click the Full List button to access the navigation page. A list of the user's notifications is displayed. Some notifications do not require action and are for your information only. You must select View All on this page to view these notifications.

(E) **Orders At a Glance:** Noted as E above, displays the five most recent purchase orders.

Click on a PO number link to view the purchase order details.

Click the <Full List> button to view the Purchase Orders page.

(F) **Quick Links:** Noted as F above, displays the procure-to-pay flow through the iSupplier Application. Selected pages appear here for easy access. Click on any link to go directly to the corresponding page.

## Orders

### Purchase Orders

To search for purchase orders, click on the Orders tab. The Views page is displayed and the Last 25 purchase orders are listed. Another way to open this page is to click on Purchase Orders under the Quick Links.

The screenshot shows the Oracle iSupplier Portal interface. At the top, there is a navigation bar with 'Home', 'Orders', 'Shipments', 'Account', and 'Admin' tabs. Below this is a breadcrumb trail: 'Purchase Orders | Purchase History | RFQ'. The main content area is titled 'Purchase Orders' and includes a 'Views' section with a dropdown menu. The dropdown menu is open, showing options: 'All Purchase Orders', 'Last 25 Purchase Orders', 'Purchase Orders to Acknowledge', and 'Purchase Orders Pending Supplier Change'. A 'Go' button is next to the dropdown. To the right of the dropdown is an 'Advanced Search' button. Below the dropdown is a table of purchase orders with columns: 'Select PO Number', 'Description', 'Order Date', 'Buyer', 'Currency', 'Amount', and 'Status'. The table contains three rows of data. At the bottom left, there are two radio buttons labeled 'E' and 'F'. At the bottom right, there is an 'Export' button. Red circles labeled A through G highlight these elements: A (Views dropdown), B (Export button), C (Go button), D (Table header), E (Radio button), F (Radio button), and G (Advanced Search button).

Select PO Number	Description	Order Date	Buyer	Currency	Amount	Status
EP50087	Inovant LLC Standard PO	10-Jul-2007 14:23:54	Ariba User	USD	1,900.00	Frozen
EP48939	Inovant LLC Standard PO	08-Jun-2007 14:46:15	Ariba User	USD	450.00	Frozen
EP48810	Inovant LLC Standard PO	06-Jun-2007 13:53:43	Ariba User	USD	24,800.00	Frozen

(A) To view all purchase orders, pull the drop down list, select All Purchase Orders, and click on Go. The two other options "Purchase Orders to Acknowledge" and "Purchase Orders Pending Supplier Change" are currently not in use.

(B) To export the information to a spreadsheet, click on the Export button.

(C) To change the way that the information is sorted, click a raised column heading. Click the column heading again to reverse the sort order. For this page, you can sort by PO Number or Order Date.

(D) The status column shows the current PO status. Only purchase orders with the status of Open or Frozen are available for invoices. Please note that the POs with Frozen status are NOT in a suspended status as the names implies. Purchase orders with the status of Closed, Finally Closed, or Cancelled are no longer available for invoices.

(E) Click on the PO Number to get more detailed information about a specific order.

(F) The Rev column shows the number of revisions associated with the purchase order. If the value under the Rev column is not 0, click on the revision number and the system will list all the revisions for that particular PO.

(G) Use the Advanced Search button to add other search criteria. When you click on this button, the following page is presented:

**VISA Supplier Portal** Home Logout Preferences Help

Home **Orders** Shipments Account Admin

Purchase Orders | Purchase History | RFQ

Purchase Orders Export

**Advanced Search** Views

Search results where each must contain all values entered.  
 Search results where each may contain any value entered.

PO Number is % B

Document Type is A C

Order Date is not contains A

Buyer starts with ends with A

D Go Clear Add Another Business Unit Add

Select Order: E View Change History

Select PO Number	Rev	Business Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status
<a href="#">EP48700</a>	0	Visa USA	Standard PO		01-Jun-2007 14:40:18	<a href="#">Ariba User</a>	USD	120,000.00	Frozen
<a href="#">EP46100</a>	0	Visa USA	Standard PO		14-Mar-2007 15:24:23	<a href="#">Ariba User</a>	USD	57,000.00	Finally Closed
<a href="#">EP38880</a>	0	Visa USA	Standard PO		10-Aug-2006 15:02:26	<a href="#">Ariba User</a>	USD	275,638.50	Frozen
<a href="#">EP36888</a>	0	Visa USA	Standard PO		08-Jun-2006 16:16:10	<a href="#">Ariba User</a>	USD	8,000.00	Finally Closed

Export

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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(A) The dropdown option next to PO Number, Document Type, Order Date and Buyer allows you to filter the search results.

(B) For all searches, you can use the percent sign (%) as a wildcard.

(C) When you click on the flashlight, the system will present another screen where you can select from a list of available values. Once you have identified the appropriate value, click on the icon under Quick Select and the system will automatically populate the field with that value.

(D) Click on Go to initiate the search.

(E) For now, the change history button is not in use.

## Search and Select: Buyer

[Cancel](#) [Select](#)

### Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

### Results

Previous  Next

Select	Quick Select	Buyer	Employee Number
<input type="radio"/>		ABRAIRA, PATRICIA	09088
<input type="radio"/>		AHMED, IQBAL	P35268

In advanced search, users can also add other attributes to the search criteria.

**VISA iSupplier Portal** Home Logout Preferences Help

Home **Orders** Shipments Account Admin

Purchase Orders | Purchase History | RFQ

Purchase Orders

**Advanced Search**

Search results where each must contain all values entered.  
 Search results where each may contain any value entered.

PO Number

Document Type

Order Date

Buyer

Select Order:	View Change History	Business Unit	Description	Order Date	Buyer	Currency	Amount	Status
<input type="radio"/>	EP46700	Q	Visa USA	01-Jun-2007 14:40:18	Anba User	USD	120,000.00	Frozen
<input type="radio"/>	EP46100	Q	Visa USA	14-Mar-2007 15:24:23	Anba User	USD	57,000.00	Finally Closed
<input type="radio"/>	EP38880	Q	Visa USA	10-Aug-2006 15:02:26	Anba User	USD	275,638.50	Frozen
<input type="radio"/>	EP36868	Q	Visa USA	08-Jun-2006 16:16:10	Anba User	USD	8,000.00	Finally Closed

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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## Purchase History

The Purchase Order Revision History shows all the prior versions of the purchase orders. Similar to purchase orders, you can also create an advanced search with Purchase History.

**VISA iSupplier Portal** Home Logout Preferences Help

Home **Orders** Shipments Account Admin

Purchase Orders | **Purchase History** | RFQ

Purchase Order Revision History

**Simple Search**

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

PO Number

Release Number

Rev

Document Type

Creation Date

Revised Date

Business Unit

PO Number	Rev	Business Unit	Description	Buyer	Creation Date	Revised Date	Currency	Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
No search conducted.												

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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## RFQ

The RFQ page will show all the RFQs where the supplier was a participant. Similar to purchase orders, you can also create an advanced search with RFQ.

Home | Logout | Preferences | Help

Home | Orders | Shipments | Account | Admin

Purchase Orders | Purchase History | RFQ

RFQ Summary

Simple Search

Advanced Search

RFQ Number

Response Due By

Go Clear

RFQ Number	Description	Creation Date	Response Due By	Contact	Quote Effectivity Start Date	Quote Effectivity End Date	Ship-To Location
No search conducted.							

Export

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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## Shipments

The Shipments shows Receipts and Returns transactions.

## Receipts

Under Receipts, users can view items received by Visa that was processed through the Oracle Purchasing application. Both simple and advanced search can be performed for Receipt transactions.

Home | Logout | Preferences | Help

Home | Orders | Shipments | Account | Admin

Receipts | Returns

Receipt Transactions

Simple Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Advanced Search

Organization

Receipt Number

Receipt Date

PO Number

Item

Supplier Item

Receipt Location

Go Clear

Organization	Receipt Number	Receipt Date	PO Number	Item	Supplier Item	Item Description	UOM	Quantity Received	Receipt Location	View Attachments	Supplier Organization ID
No search conducted.											

Export

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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## Returns

Under Returns, users can view returned items that were processed through the Oracle application. Both simple and advanced search can be performed for Return transactions.

Simple Search

Advanced Search

Organization

Receipt Number

PO Number

Shipment Number

RMA Number

Item

Supplier Item

Item Description

Go Clear

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Supplier Item	Item Description	UOM	Quantity Received	Quantity Returned	Return Date	Reason	Supplier Config ID
No search conducted.													

Export

## Account

The Account tab shows supplier invoices and payments.

## Invoices

Under Invoices, users can view invoices that have been processed by Accounts Payable through the Oracle application. This will not include any transactions paid by a Purchasing or Corporate Card. Both simple and advanced search can be performed for Invoice transactions.

Export

Simple Search

Advanced Search

Invoice Number  % **A**

Payment Number

Gross Amount From

Gross Amount To

Amount Due From

Amount Due To

PO Number

Payment Status

Invoice Date From

Invoice Date To

Due Date From

Due Date To

Go Clear

Invoice Number	Description	Invoice Date	PO Number	Currency	Gross Amount	Amount Due	Due Date	Status	Payment Number	Discount Date	Available Discount	Packing Slip	Attachments	Type
T1733	EP46700	14-May-2007	EP46700	USD	10,500.00	10,500.00	13-Jun-2007	On Hold						Standard
T1646	EP38880	23-Mar-2007	EP38880	USD	63,000.00	0.00	22-Apr-2007	Approved	216980 - Check					Standard
T1641	EP38880	21-Mar-2007	EP38880	USD	33,160.00	0.00	20-Apr-2007	Approved	216979 - Check					Standard

(A) The page will list the invoices that meet the search criteria. In this instance, the % sign was used so the page lists all invoices associated with this supplier.

For invoice search, you can sort by invoice number, invoice date, due date and status.

You can also drilldown on any of the values that are in red. In the screen above, you can drill down on the invoice number, status or payment number to get additional information. You can also export this information into excel using the export button in the right corner of the page.

(B) When you drill down on an invoice that is On Hold status, the system will open up a page that shows the Hold Reason. Listed below are the definitions of the different Hold Reason and the next steps for the supplier.

<b>Hold Reason</b>	<b>Definition</b>	<b>Next Steps</b>
<b>Pending Sig Approval</b>	Invoice requires Visa internal approval	All invoices over \$2500 with PO require approval from the business unit making the purchase. This means the approvals are not yet complete for this invoice. If the invoice is past due, please contact your business unit or Visa AP to inquire.
<b>QTY ORD</b>	PO is overfilled, not enough funds to pay the invoice	Funds need to be added to the PO before the invoice can be paid. If the invoice is past-due, please inquire with your Visa Business contact for status.
<b>Max Ship Amt</b>	PO line is overfilled, not enough funds to pay the invoice	Funds need to be added to that particular line of the PO before the invoice can be paid. If the invoice is past-due, please inquire with your Visa Business contact for status.
<b>QTY REC</b>	Goods need to be received in the system before payment can be made.	Payment cannot go out until the goods are received. If goods were shipped and payment is past-due, please contact Visa AP.
<b>Research in Progress</b>	Invoice issues requiring further research	If Visa AP or business unit has not contacted the vendor, please inquire with Visa AP. This could be an internal PO issue that we will work to resolve as quickly as possible.
<b>PO Required</b>	Invoice requires a valid PO for payment	Issue may be resolved internally, if payment is past-due, please inquire with VISA AP.
<b>Invalid CC Number/Account</b>	Internal accounting issue on invoice	Please do not contact Visa AP; issue will be resolved internally before invoice is due for payment.
<b>Final Matching</b>	Internal accounting issue on invoice	Please do not contact Visa AP; issue will be resolved internally before invoice is due for payment.
<b>DIST ACCT INVALID</b>	Internal accounting issue on invoice	Please do not contact Visa AP; issue will be resolved internally before invoice is due for payment.
<b>Tax Variance</b>	Internal accounting issue on invoice	Please do not contact Visa AP; issue will be resolved internally before invoice is due for payment.

## Payments

Under Payments, users can view payments made to the supplier. Both simple and advanced search can be performed for Payment transactions.

To see the invoice information associated with a specific payment, click on the payment number under the payment column. This view will give you a remittance look at the payment breakdown when multiple invoices and/or POs are included in one payment.

VISA iSupplier Portal

Home Logout Preferences Help

Home Orders Shipments Account Admin

View Invoices | View Payments

Payment Summary Export

Simple Search Advanced Search

PO Number  Payment

Payment Date From 01-Jan-2007  Payment Amount From

Payment Date To 31-Dec-2007  Payment Amount To

Payment	Invoice	PO Number	Payment Date	Currency	Amount	Voided	Supplier Site	Supplier Address
216979	T1641	EP38880	19-Apr-2007	USD	33,160.00		LAVAL	LAVAL CANADA
216980	T1646	EP38880	19-Apr-2007	USD	63,000.00		PASADENA	PASADENA CA
216806	T1634	EP46100	16-Apr-2007	USD	57,000.00		PASADENA	PASADENA CA
213368	TE5148, TE5163	EP38880	17-Jan-2007	USD	2,100.88		PASADENA	PASADENA CA

Export

## Admin

Under the Admin tab, the user can view general information relating to the supplier.

VISA iSupplier Portal

Home Logout Preferences Help

Home Orders Shipments Account Admin

Profile Management

Supplier Details

Supplier Name  
Supplier Number  
Taxpayer ID  
Tax Registration Number  
DUNS Number

**New to Supplier Profile Management ?**  
Using the profile management features, you can manage key information about your company.  
[Learn more ...](#)

Attachments

Search  
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.  
Name

[Show More Search Options](#)

Please submit supplier forms, insurance and tax certificates and other Strategic Sourcing related documents by clicking on the "Add Attachments" button. Blank forms are available at [www.visa.com/suppliers](http://www.visa.com/suppliers)

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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## Supplier Details

This page is used to add attachments to the supplier profile. Adding attachments allows the supplier to upload documents pertinent to the purchasing relationship or upload documents

specifically requested by Visa. Both buyer and supplier users can attach documents, text or files in this section.

Click on Add attachments to open up the page. Once you are done, click on the Apply button to save the attachment. Users have the option to Add, Edit or Delete an attachment.

**VISA** iSupplier Portal [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Supplier Details](#) >  
**Add Attachment** [Cancel](#) [Add Another](#) [Apply](#)

**Attachment Summary Information**  
\* Indicates required field  
\* Description   
Category **To Supplier**

**Define Attachment**  
Type  File  [Browse...](#)  
 URL  
 Text  
  
Name   
(Optional: provide a name to Text attachment)

[Cancel](#) [Add Another](#) [Apply](#)

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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When you delete an attachment, the system will request for confirmation before the attachment is deleted.

**VISA** iSupplier Portal [Home](#) [Logout](#) [Preferences](#)

- Profile Management
  - **Supplier Details**
  - Address Book
  - Contact Directory
  - Business Classifications

**Warning**  
Are you sure you want to delete the attachment "396661.pdf" of attachment type File for this record?

[No](#) [Yes](#)

[Home](#) | [Logout](#) | [Preferences](#) [Privacy Statement](#)

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## Address Book

Address book shows the various sites associated with the supplier.

**Profile Management**

- Supplier Details
- Address Book**
- Contact Directory
- Business Classifications
- User Accounts

**Address Book**

Details of changes you make to your Address Book will be routed to a buyer for review. [Learn more...](#)

Address Name	Address Details
LAVAL	600 BLVD ARMAND-FRAPPIER LAVAL,CANADA,QUEBEC,H7V 4B4 Canada
PASADENA	3452 EAST FOOTHILL #720 PASADENA,CA,91107 United States

## Contact Directory




Contact Directory shows all contacts associated with the supplier.

**Profile Management**

- Supplier Details
- Address Book
- Contact Directory**
- Business Classifications
- User Accounts

**Contact Directory**

Details of changes you make to your Contact Directory will be routed to a buyer for review. [Learn more...](#)

Name	Email	Phone	Remove	Manage Address Details	Edit
KEVIN SMITH					

- (A) To remove a supplier contact, click on the Garbage Can under Remove.
- (B) To edit the information for an existing contact, click on the Pencil under Edit.
- (C) To link the contact to a specific address on the address book, click on the icon under Manage Address Details.
- (D) Users with Inquiry responsibility can add contacts information in iSupplier. To add, click on the Add button.

**Profile Management**

- Supplier Details
- Address Book
- Contact Directory
- Business Classifications
- User Accounts

**Add Contact**

\* Indicates required field

Contact Title	<input type="text"/>	Phone Area Code	<input type="text"/>
First Name	<input type="text"/>	Phone Number	<input type="text"/>
Middle Name	<input type="text"/>	Phone Extension	<input type="text"/>
* Last Name	<input type="text"/>	Fax Area Code	<input type="text"/>
Job Title	<input type="text"/>	Fax Number	<input type="text"/>
Email Address	<input type="text"/>		

Provide the information requested and click on the Apply button to save.

## Business Classifications

Business classifications are used to identify attributes associated with the suppliers. It is also used to track documents that suppliers are required to provide to Visa.

- Profile Management
  - Supplier Details
  - Business Classifications

**Business Classifications**

Identify those classifications that apply to your company.

[Revert](#) [Save](#)

Previous 1-15 Next 15

Classification	Applicable	Minority Type	Certificate # / \$ Coverage	Certifying Agency	Start Date	Expiration Date	Status
101. Minority Owned	<input checked="" type="checkbox"/>	Yes	5554	MBE	01-Jan-2007	12-31-2007	
102. Small Business	<input type="checkbox"/>						
103. Women Owned	<input type="checkbox"/>						
104. Hub Zone	<input type="checkbox"/>						
105. Service-disabled Veteran Owned	<input type="checkbox"/>						
106. Veteran Owned	<input type="checkbox"/>						
200. Future Use	<input type="checkbox"/>						
301. Requalification	<input type="checkbox"/>						
302. Access to cardholder data	<input type="checkbox"/>						
303. IRS Form W-8	<input type="checkbox"/>						
304. Less than 3 employees	<input type="checkbox"/>						
401. Commercial General Liability Insurance	<input checked="" type="checkbox"/>		AH12879	Zurich	03-Mar-2007	02-Mar-2007	
402. Workers Compensation Insurance	<input checked="" type="checkbox"/>		AH12879	Zurich	03-Mar-2007	02-Mar-2007	
403. Employer's Liability Insurance	<input type="checkbox"/>						
404. Automobile Liability Insurance	<input type="checkbox"/>						

Previous 1-15 Next 15

[Revert](#) [Save](#)

Click on next 15 classifications

Profile Management

- Supplier Details
- Address Book
- Contact Directory
- Business Classifications**
- User Accounts

Admin: Profile Management, Contact Directory >

**Business Classifications**

Identify those classifications that apply to your company.

Previous 15 16-22 of 22 Next

Classification	Applicable	Minority Type	Certificate # / \$ Coverage	Certifying Agency	Start Date	Expiration Date	Status
405. Crime Fidelity Bond Insurance	<input type="checkbox"/>						
406. Professional Liability Insurance	<input type="checkbox"/>						
407. Media Liability Insurance	<input type="checkbox"/>						
408. Technology Errors and Omissions Liability Insurance	<input type="checkbox"/>						
409. Cyber-Risk Liability Insurance	<input type="checkbox"/>						
410. Umbrella Liability Insurance	<input type="checkbox"/>						
411. Other Insurance	<input type="checkbox"/>						

The business classification information can be updated by the Visa Buyer or the supplier with Visa iSupplier Classifications responsibility.

## User Accounts

User Accounts lists all the supplier contacts that have access to the iSupplier portal.

**Profile Management**

- Supplier Details
- Address Book
- Contact Directory
- Business Classifications
- User Accounts**

**User Accounts**

The following people have active accounts and can access the portal on behalf of your company.

User Name	Email	First Name	Middle Name	Last Name	Phone Number	Job Title
TOM@VISA.COM	tom@visa.com	Tom		Thomas	5555551212	Sales

Supplier's access to the system is managed by Visa Buyer. Please send an e-mail to [USAstrategicSourcing@visa.com](mailto:USAstrategicSourcing@visa.com) if you need to add a new user; remove or terminate an existing user's access or if you need to reset your password.

## Visa iSupplier Contact Directory

The users with Contact Directory responsibility are able to add, edit, delete and manage the supplier contact information. The functionality is the same as discussed in Contact Directory under the Visa iSupplier Inquiry responsibility.

## Visa iSupplier Address Book

The Visa iSupplier Address Book responsibility allows users to add addresses to the supplier record.

VISA iSupplier Portal

[Home](#) [Logout](#) [Preferences](#) [Help](#)

- Profile Management
  - Supplier Details
  - **Address Book**

**Address Book**

Details of changes you make to your Address Book will be routed to a buyer for review. [Learn more...](#)

Address Name	Address Details
LAVAL	600 BLVD ARMAND-FRAPIER LAVAL,CANADA,QUEBEC,H7V 4B4 Canada
PASADENA	3452 EAST FOOTHILL,#720 PASADENA,CA,91107 United States

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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To add a new address, click on the Add button.

[Address Book](#) >

**Add Address**

\* Indicates required field

\* Address Name  Provide a suitable nickname for the address.

Country

\* Address

\* City/Town/Locality   
 County

\* State/Region   
 Province

\* Postal Code

Note   
Include any additional details about the address such as the type of the address

Phone Area Code   
 Phone Number   
 Fax Area Code   
 Fax Number   
 Email Address

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[Privacy Statement](#)

Provide all the information requested. Those fields marked with an \* are required fields. Click Apply to save and submit the information. You will get the confirmation message below:

**Confirmation**

**SAN DIEGO has been saved and will be submitted for review and approval.**

[Return to Address Book](#)

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[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

[Privacy Statement](#)

If the new address is approved, the new address will show up on the list of address book. If it was rejected, supplier will NOT be notified and the address will not be listed on the address book.

- Profile Management
  - Supplier Details
  - **Address Book**

**Address Book**

Details of changes you make to your Address Book will be routed to a buyer for review. [Learn more...](#)

<input type="button" value="Add"/>	
Address Name <input type="button" value="v"/>	Address Details
LAVAL	600 BLVD ARMAND-FRAPPIER LAVAL,CANADA,QUEBEC,H7V 4B4 Canada
PASADENA	3452 EAST FOOTHILL #720 PASADENA,CA,91107 United States
SAN DIEGO	123 Mission St. San Diego,CA,90000 United States

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[Privacy Statement](#)

# Visa iSupplier Bank Account

Users with Visa iSupplier Bank Accounts responsibility can add delete and edit bank account information.

The Supplier Details page is where you can add attachments as explained above.

The Address Book allows you to navigate to the page below. This list includes the site names and address details for you as a supplier. From here you can manage the bank accounts assigned to particular sites.

**VISA iSupplier Portal** [Home](#) [Logout](#) [Preferences](#) [Help](#)

- Profile Management
  - Supplier Details
  - Address Book**
  - Bank Accounts

**Address Book**  
 Details of changes you make to your Address Book will be routed to a buyer for review. [Learn more...](#)

[Add](#)

Address Name ^	Address Details	Manage Bank Account Assignments
LAVAL	600 BLVD ARMAND-FRAPPIER LAVAL,CANADA,QUEBEC,H7V 4B4 Canada	
PASADENA	3452 EAST FOOTHILL #720 PASADENA,CA,91107 United States	
SAN DIEGO	123 Mission St. San Diego,CA,90000 United States	

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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To edit bank account assignment, click on the box under Manage Bank Account Assignments next to the site you would like to modify. You will be able to designate the primary bank account for a site. This is useful for when a new site is added but an existing bank account is to be used. You can also remove a bank account assignment from an address.

**VISA iSupplier Portal** [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Address Book](#) >

**Manage Bank Account Assignments** [Cancel](#) [Apply](#)

Address Name **SAN DIEGO**  
 Address Details **123 Mission St.**  
**San Diego, CA, 90000**  
**United States**

Bank Account Number ^	Currency	Bank Account Name	Bank Number	Branch Number	Used By Address	Primary Account
71746	USD - US Dollar	TENROX	122000661	122000661	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel](#) [Apply](#)

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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The supplier will receive a confirmation for the change in bank account assignment.

**VISA iSupplier Portal** [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Confirmation](#)

**Bank account assignments for SAN DIEGO have been updated.**

[Return to Address Book](#)

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

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To add, delete or edit a bank account, click on Bank Accounts from the menu. This page should list all of the active bank accounts Visa has on file for you.

NOTE: If this is your first time logging on to this system, please take a moment to review the information here. If the information we have is inaccurate or there is no current bank information listed, please follow the below steps to ensure timely payment by Visa.

You can sort the list based on the bank account number, currency, bank account name, bank name, and branch name or status columns.

**VISA** iSupplier Portal [Home](#) [Logout](#) [Preferences](#) [Help](#)

- Profile Management
  - Supplier Details
  - Address Book
  - Bank Accounts

**Bank Accounts**

Details of changes you make to your accounts will be routed to a buyer for review. [Learn more...](#)

Details	Bank Account Number	Currency	Remove	Bank Account Name	Bank Name	Bank Number	Branch Name	Branch Number	Status	Edit
<a href="#">▶ Show</a>	71746	USD - US Dollar		Supplier T	BANK OF AMERICA	122000661	<a href="#">122000661</a>	122000661	Change Pending	

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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## Edit Bank Account

To make an update to an existing bank account, click on the Edit Pencil under the far right column. The bank account information and you can edit the account details and the address assignments.

The Copy from Another Account button allows you to copy the address assignments from another bank account.

[Bank Accounts](#) >

**Edit Bank Account**

\* Indicates required field

Country **United States**  
 Bank Name **BANK OF AMERICA**  
 Branch Name **122000661**  
 Bank Account Number **71746**  
 Bank Number **122000661**  
 Branch Number **122000661**  
 Currency **USD - US Dollar**

**Account Details**

\* Bank Account Name  Account Type   
 Description   
 Inactive Date    
(example: 23-Aug-2007)  
 Bank Account Holder

**Address Assignments**

**All Addresses**

You can designate that the bank account is available for use at all company addresses.

- The account is used by all addresses
- The account is the primary account for all addresses

**Specific Addresses**

Address Name	Address Details	Used by Address	Primary Account
LAVAL	600 BLVD ARMAND-FRAPPIER, LAVAL, CANADA, QUEBEC, H7V 4B4, Canada	<input type="checkbox"/>	<input type="checkbox"/>
PASADENA	3452 EAST FOOTHILL #720, PASADENA, CA, 91107, United States	<input type="checkbox"/>	<input type="checkbox"/>
SAN DIEGO	123 Mission St., San Diego, CA, 90000, United States	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Comments**

Comments from Administrator **None**  
 Notes to Administrator

Once changes are applied, you should receive the following Confirmation,

**Confirmation**

Bank account 71746 at the 122000661 branch of BANK OF AMERICA and its related address assignments have been modified. These changes will be routed to an administrator for approval.

[Return to Bank Accounts](#)

## Add Bank Account

To add a Bank Account, click Add above the list of current bank accounts. Complete all the required fields which are identified with an \*. The address assignments are completed as above. You can also provide a note to Visa in the box at the bottom of the page if necessary.

**NOTE:** Be sure to change the currency to USD if the account resides in the United States.

[Bank Accounts](#) >

**Add Bank Account**

\* Indicates required field

Country

\* Bank Number  \* Branch Number

\* Bank Account Number  Currency

**Account Details**

\* Bank Account Name  Account Type

Description  Check Digits

Inactive Date    
(example: 23-Aug-2007)

Bank Account Holder

**Address Assignments**

**All Addresses**

You can designate that the bank account is available for use at all company addresses.

- The account is used by all addresses
- The account is the primary account for all addresses

**Specific Addresses**

You can also link the account to specific locations for your company.

Address Name	Address Details	Used by Address	Primary Account
LAVAL	600 BLVD ARMAND-FRAPPIER, LAVAL, CANADA, QUEBEC, H7V 4B4, Canada	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PASADENA	3452 EAST FOOTHILL #720, PASADENA, CA, 91107, United States	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SAN DIEGO	123 Mission St., San Diego, CA, 90000, United States	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Comments**

Notes to Administrator

For the bank number and branch number fields, provide the bank routing number. If the bank routing number has never been used before, the following screen will appear:

[Bank Accounts](#) > [Add Bank Account](#) >

**Information**

There are no details in the system for the bank and branch you have defined for the new account. Please enter details for both and press Confirm.

**Bank and Branch Details**

\* Indicates required field

Country **United States**

Bank Number **123456789**

\* Bank Name

**Branch Details**

Branch Number **123456789**

Type

\* Branch Name

Description

BIC

**Branch Address**

Address Line 1

Address Line 2

Address Line 3

Address Line 4

City/Locality

County

State/Region

Province

Postal Code

For the branch name, key in the bank routing number as well.

## Confirmation of Change



[Home](#) [Logout](#) [Preferences](#) [Help](#)

### Confirmation

Bank account 02700055523 at the San Francisco branch of Bank of America has been added to your company profile. The account information will be routed to an administrator who will review the details and carry out any account verification that is required. You will be notified once the review is complete.

[Return to Bank Accounts](#)

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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If you have recently submitted a change, you will see a status of Change Pending until Visa has approved or rejected your edits. The status will then change to approved until and further updates are made. A status of New appears after a bank account has been added but not assigned to an address.

## Remove Bank Account

The ability to remove an account (trash can under the remove column) is only available for accounts in the NEW or Rejected status. If you believe a bank account should be de-activated, please contact [USAStrategicSourcing@visa.com](mailto:USAStrategicSourcing@visa.com).



[Home](#) [Logout](#) [Preferences](#) [Help](#)

Bank Accounts										
Details of changes you make to your accounts will be routed to a buyer for review. <a href="#">Learn more...</a>										
<a href="#">Add</a>										
Details	Bank Account Number	Currency	Remove	Bank Account Name	Bank Name	Bank Number	Branch Name	Branch Number	Status	Edit
<a href="#">▶ Show</a>	02700055523	USD - US Dollar		Supplier T	Bank of America	121100000	<a href="#">San Francisco</a>	121100000	New	
<a href="#">▶ Show</a>	71746	USD - US Dollar		Supplier T	BANK OF AMERICA	122000661	<a href="#">122000661</a>	122000661	Change Pending	

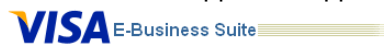
[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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Once Visa reviews the changes you will receive one of the following notifications:

### Notification to Supplier of Approval



[Home](#) [Logout](#) [Preferences](#) [Help](#)

[Worklist](#) >

#### Information

This notification has been closed and did not require a response.

#### Supplier Profile Management: Approval of Bank Account

To: TOM THOMAS  
Sent: 07-Sep-2007 21:15:04  
Closed: 07-Sep-2007 21:15:57  
ID: 895551

Responder  
Your request to create BANK OF AMERICA account 71746 has been approved.

Visit [Visa iSupplier Portal Page](#) for more information about the Visa iSupplier portal.

Thank you.

[Return to Worklist](#)

Display next notification after my response

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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## Notification to Supplier of Rejection



[Home](#) [Logout](#) [Preferences](#) [Help](#)

[Worklist](#) >

### Information

This notification has been closed and did not require a response.

#### Supplier Profile Management: Rejection of Bank Account

To **TOM THOMAS**  
 Sent **07-Sep-2007 21:17:00**  
 Closed **07-Sep-2007 21:17:52**  
 ID **895552**

Responder  
 Your request to create Bank of America account 02700055523 has been declined.

Visit [Visa iSupplier Portal Page](#) for more information about the Visa iSupplier portal.

Thank you.

[Return to Worklist](#)

Display next notification after my response

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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The bank account status changes after the Visa Buyer approves or rejects the request.



[Home](#) [Logout](#) [Preferences](#) [Help](#)

- Profile Management
- Supplier Details
- Address Book
- Contact Directory
- **Bank Accounts**

### Bank Accounts: TENROX

Account details provided by the supplier must be approved in order to use them in the Accounts Payable system. [Learn more...](#)

View All Bank Accounts

[View Deactivated Accounts](#)

Details	Bank Account Number	Currency	Remove	Bank Account Name	Bank Name	Bank Number	Branch Name	Branch Number	Status	Approve	Manage Address Assignments	Edit
<a href="#">▶ Show</a>	02700055523	USD - US Dollar		<a href="#">Supplier I</a>	Bank of America	121100000	<a href="#">San Francisco</a>	121100000	Rejected			
<a href="#">▶ Show</a>	71746	USD - US Dollar		<a href="#">Supplier I</a>	BANK OF AMERICA	122000661	<a href="#">122000661</a>	122000661	Approved			

[Return to Supplier Search](#)

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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## Visa iSupplier Classifications

The Visa iSupplier Classifications responsibility allows the user to update supplier qualification and insurance related information.

- Profile Management
- Supplier Details
- **Business Classifications**

### Business Classifications

Identify those classifications that apply to your company.

D E

B C

Classification	Applicable	Minority Type	Certificate # / \$ Coverage	Certifying Agency	Start Date	Expiration Date	Status
101. Minority Owned	<input checked="" type="checkbox"/>	Yes	5554	MBE	01-Jan-2007	31-Dec-2007	APPROVED
102. Small Business	<input type="checkbox"/>						
103. Women Owned	<input type="checkbox"/>						
104. Hub Zone	<input type="checkbox"/>						
105. Service-disabled Veteran Owned	<input checked="" type="checkbox"/>		986	VA	01-Jan-2007	31-Dec-2007	PENDING
106. Veteran Owned	<input type="checkbox"/>						
200. Future Use	<input type="checkbox"/>						
301. Requalification	<input type="checkbox"/>						
302. Access to cardholder data	<input type="checkbox"/>						
303. IRS Form W-8	<input type="checkbox"/>						
304. Less than 3 employees	<input type="checkbox"/>						
401. Commercial General Liability Insurance	<input checked="" type="checkbox"/>		AH12879	Zurich	01-Jan-2007	02-Mar-2007	APPROVED
402. Workers Compensation Insurance	<input checked="" type="checkbox"/>		AH12879	Zurich	01-Jan-2007	02-Mar-2007	APPROVED
403. Employer's Liability Insurance	<input type="checkbox"/>						
404. Automobile Liability Insurance	<input type="checkbox"/>						

D E

(A) Supplier must submit all documentation like insurance certificates to support updates made on the Classification page. Click on Supplier Details and the Add Attachment button to attach the documents.

(B) Click on the box under the applicable column for the line that you are updating and provide the necessary information.

(C) For the two columns, Certificate #/\$Coverage and Certifying Agency, the information requested is different depending on the classification type:

#101-106, provide the Certificate number and the Certifying Agency Name

#200-304, no information is required

#401-411, provide the coverage amount in US dollar equivalent and the name of the insurance company.

(D) Click on revert to return to the page prior to your changes. You can only revert to the previous values if you have not yet saved the information.

(D) Click on Save to submit your updates. If a specific classification is no longer applicable, uncheck the box under Applicable column and click on the Save button. The system will remove all the information associated with that classification. Once you hit save, you will receive the confirmation message below and the classification status will change to Pending.

Confirmation

Your request has been saved and will be submitted for review and approval.

[Return to Business Classifications](#)

The Visa Buyer will be notified of your changes. They can approve, reject or update your changes after they review the documentation you submitted.

## Visa iSupplier Invoicing

The Visa iSupplier Invoicing functionality allows suppliers to create Standard invoices and Credit Memos on iSupplier and electronically submit those invoices to Visa Accounts Payable for processing. Currently, this feature is only available to suppliers who have Purchase Orders that are either in Open or Frozen status.

When you click on this responsibility, the PO search screen is presented. Click on the Invoices quick link.

The screenshot shows the VISA iSupplier Portal interface. At the top, there is a search bar with 'PO Number' selected and a 'Go' button. Below the search bar is a 'Notifications' section with a 'Full List' button and a table showing 'No results found.' To the right is a navigation menu with links for 'Orders', 'Purchase History', 'Invoices' (circled in red), 'Payments', and 'Payments'. At the bottom, there is a copyright notice for Oracle and a 'Privacy Statement' link.

The Invoices page is presented.

The screenshot shows the 'Invoices' page in the VISA iSupplier Portal. The blue menu bar at the top contains 'Create Invoices' (circled in red), 'View Invoices', and 'View Payments'. Below the menu bar is an 'Invoice Summary' section with an 'Export' button. A 'Simple Search' section contains various input fields for Invoice Number, PO Number, Payment Number, Payment Status, Gross Amount, Invoice Date, and Due Date. Below the search fields is a table with columns: Invoice Number, Description, Invoice Date, PO Number, Currency, Gross Amount, Amount Due, Due Date, Payment Status, Payment Number, Discount Date, Available Discount, Packing Slip, Attachments, and Type. The table currently shows 'No search conducted.' An 'Export' button is located at the bottom right of the table.

Click on Create Invoices in the blue menu bar.

Invoices

Find saved, unsubmitted invoices so you can update and submit them. Select View Invoices from the Account tab to review processed invoices.

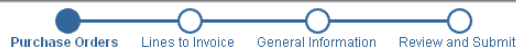
Search

Search By: Invoice Number

Saved Invoices

Supplier	Invoice Number	Date	Currency	Invoice Amount	Purchase Order	View Attachments	Update	Delete
No search conducted.								

The system gives you the option to create a Standard Invoice or Credit Memo. Click on the Create Standard Invoice button.



Create Invoice: Purchase Orders

Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Supplier:    
 Purchase Order Number:   
 Purchase Order Date:    
 (example: 23-Aug-2007)  
 Buyer:    
 Organization:

Select Items:

Select All | Select None

Select	Quick Invoice	Supplier	PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization
<input type="checkbox"/>	<input type="button" value="Flashlight"/>		EP48700	2	1	change (Add kweek)			73500	0	0	EACH	1.00	USD	Visa HQ	Visa USA
<input type="checkbox"/>	<input type="button" value="Flashlight"/>		EP48700	1	1	change			46500	0	10500	EACH	1.00	USD	Visa HQ	Visa USA

- (A) Enter the first few letters of the supplier name and click Go. The system will automatically list all the purchase orders associated with active sites. You can also search by clicking on the flashlight.
- (B) Select the correct purchase order by clicking on the box under the select column.
- (C) You may select more than one line to add to the invoice as long as they are have the same purchase order number. Each invoice can only have one purchase order number. You must create a separate invoice if you have more than one purchase order. Once you have identified all the lines, click on the Add Items to Invoice List.
- (D) Click on Next to continue.



Create Invoice: Lines to Invoice

\* Indicates required field

USD = US Doll  
Supplier Name

Cancel Back Step 2 of 4 Next

B

Purchase Order Items Selected

A

PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ship To	Quantity Ordered	Quantity Received	Quantity Invoiced	Quantity to Invoice	UOM	Unit Price	Amount	Taxable	Remove
EP48700	2	1		2nd		Visa HQ	73500	0	0	<input type="text" value="73500"/>	EACH	173,500.00		<input type="checkbox"/>	
EP48700	1	1				Visa HQ	46500	0	10500	<input type="text" value="36000"/>	EACH	136,000.00		<input type="checkbox"/>	

Other Charges

Line	Charge Type	Amount (USD)	Description	Remove
	Tax	<input type="text"/>	<input type="text"/>	

Line	Charge Type	Amount (USD)	Description	Remove
	Freight	<input type="text"/>	<input type="text"/>	
<input type="button" value="Add Another Row"/>				

Line	Charge Type	Amount (USD)	Description	Remove
	Miscellaneous	<input type="text"/>	<input type="text"/>	
<input type="button" value="Add Another Row"/>				

Invoice Summary

Subtotal 0.00  
Tax 0.00  
Freight 0.00  
Miscellaneous .....  
Total (USD) 0.00

Calculate

Cancel Back Step 2 of 4 Next

- (A) Complete the quantity or amount to invoice. You can put an equal to or less than the difference between Quantity Ordered and Quantity Invoiced. All other information must tie to your purchase order. If your PO did not have any information for Taxes or Freight, do not add them here as your invoice will be rejected. You must submit those invoices manually as you do today. Click the Calculate button at the bottom of the page to update the invoice total.
- (B) Click on Next to proceed.

E

Create Invoice: General Information

\* Indicates required field

\* Invoice Number  A

B \* Invoice Date

(example: 23-Aug-2007)

NOTE: Invoice Date must not be older than 2 weeks from today's date. No future-dated invoices will be accepted.

Invoice Description

C

Attachment **None**

Remit To

Name  
Address 3452 EAST FOOTHILL #720  
PASADENA CA 91107  
Bank Account 71746

D

Step 3 of 4

- (A) Enter your own invoice number. The system will reject duplicate invoice numbers, so this number must be unique each time.
- (B) Enter invoice date. The Invoice date must not be older than 2 weeks from the date the invoice was created. Future dated invoices will be rejected.
- (C) You can enter an invoice description. This is an optional field but Visa recommends referencing the PO number and/or dates of services rendered here.
- (D) If the remit to address is different, click on the Change button to select the appropriate address from the values listed.
- (E) At this point, you have the option to click on Next or Finish. Next gives you the opportunity to review your invoice and save for later submission. Finish will automatically submit your invoice to Visa.

A

B

Create Invoice: Review and Submit

Step 4 of 4

Supplier Name  
Supplier Number  
Remit To 3452 EAST FOOTHILL #720  
PASADENA CA 91107

Invoice Number **TEN103**  
Invoice Date **07-Sep-2007**  
Invoice Description  
PO-Line-shipment **EP48700-2-1, EP48700-1-1**

Item Description	Item Number	Supplier Item Number	Quantity	Unit of Measure	Unit Price (USD)	Amount (USD)
Tenrox Change Order #3 (Add 2nd Workweek)			10000	EACH	1.00	10,000.00
Tenrox Change Order #2			2000	EACH	1.00	2,000.00

Subtotal **12,000.00**  
Tax **0.00**  
Freight **0.00**  
Miscellaneous **0.00**  
Total (USD) **12,000.00**

Step 4 of 4

- (A) Click on Save to save this invoice for later submission.
- (B) If you are satisfied with your invoice, click on Finish to submit.

**Invoices**

Find saved, unsubmitted invoices so you can update and submit them. Select View Invoices from the Account tab to review processed invoices.

[Create Credit Memo Invoice](#) [Create Standard Invoice](#)

**Search**

Search By:

**Saved Invoices**

Supplier	Invoice Number	Date	Currency	Invoice Amount	Purchase Order	View Attachments	Update	Delete
TENROX	TEN103	07-Sep-2007	USD	12000	EP48700			

[Create Credit Memo Invoice](#) [Create Standard Invoice](#)

To find you saved invoices, go back to Create Invoices and search for your invoice by putting in your invoice number or % for wildcard. The query will only show in-progress invoices saved as shown above, for all other invoices, query using the View Invoices tab.

Invoices created on iSupplier are automatically placed on Hold so Accounts Payable can review and process the invoices. It takes about 24 hours for this process to be completed. If your invoice is approved, the invoice will show up in the View Invoices query after the processing period. If the invoice was rejected or failed validation, the invoice will not appear on the list. If you have any questions about invoices, please contact Accounts Payable at [USAAccountsPayable@visa.com](mailto:USAAccountsPayable@visa.com).

## Visa Sourcing Supplier

When a negotiation is published, the invited supplier user will receive an email notification to participate in the negotiation.

From: Oracle Workflow - GIF5 (PRJT) [NoReplyTo@visa.com] Sent: Wed 9/12/2007 4:48 PM  
 To: TOM THOMAS  
 Cc:  
 Subject: Action Required: You are invited: RFI 11 (Web Consulting Services)  
 Attachments: Notification Detail.html (452 B)

From: **TAN, JANNETTE** Company: "Visa"  
 To: **TOM THOMAS** Title: **Web Consulting Services**  
 Sent: **12-SEP-07 23:46:11** Number: **11**  
 Due: **14-SEP-07 23:24:04**  
 ID: **896166**

Negotiation Preview **September 12, 2007 04:46 pm Pacific Time**  
 Negotiation Open **September 12, 2007 04:46 pm Pacific Time**  
 Negotiation Close **September 14, 2007 04:24 pm Pacific Time**  
 Supplier **TENROX**  
 Supplier Site **LOS ANGELES**

To acknowledge your intent to participate, press the Yes button on this page. To decline the invitation, press the No button. You may enter a note to the buyer in the space below before acknowledging or declining.

Click [here](#) if you want to view the document before acknowledging intent to participate and/or to enter a response. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

**Action History**

Num	Action Date	Action	From	To	Details
1	12-SEP-07 23:46:11	Submit	TAN, JANNETTE	TOM THOMAS	

[Please click here to Respond](#)

To get started,

1. Log into iSupplier and enter your user name and password.
2. Under Navigator, select the Visa Sourcing Supplier responsibility and click on the Sourcing Home Page link. You will not be able to respond to the negotiation unless you have this responsibility.

Worklist

From	Subject	Sent
TAN, JANNETTE	You are invited: RFI 518 (RFI Audit Services)	03-Oct-2007
TAN, JANNETTE	You are invited: RFI 459 (TEST)	25-Sep-2007
Swaminathan, Shankaran	Reminder: Please acknowledge intent to participate in RFI 492 (TEST)	25-Sep-2007

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

Navigator

VISA Sourcing Supplier

- Sourcing
- Sourcing Home Page
- Worklist

Negotiations

Search Open Negotiations  Title  **A**

TIP DO NOT USE BROWSER BACK BUTTON TO NAVIGATE  
Welcome, Astries, P.

Your Active and Draft Responses **B**

Press Full List to view all your company's responses.

Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
209	Draft	MINNEAPOLIS	459	TEST	RFI	0 minutes	<input type="checkbox"/>	0

**Information**

This container can hold information such as bidding procedures to help vendors.

Your Company's Open Invitations **C**

Supplier Site	Negotiation Number	Title	Type	Time Left
MINNEAPOLIS	518	RFI Audit Services	RFI	9 days 22 hours

Quick Links **D**

- |  |   |
|--|---|
| <b>Manage</b>  | <b>View Responses</b>   |
| <ul style="list-style-type: none"> <li>Drafts</li> <li>Personal Information</li> </ul> | <ul style="list-style-type: none"> <li>Active</li> <li>Disqualified</li> <li>Awarded</li> <li>Rejected</li> </ul> |

## Negotiation Home Page

The Negotiations Home page is the central point of access for all your negotiations. From here, you can respond to all public negotiations as well as those negotiations to which you have been specifically invited. You can also monitor negotiations in which you are participating and manage any draft responses you have.

**A.** You can access any open negotiation even if you were not specifically invited. This can occur if Visa has selected the Open style of negotiation for an RFI or Auction. To find open negotiations, use the Search Negotiations fields at the top of the page. You can search by:

- Negotiation title.
- Negotiation number.
- Negotiation creator (contact).
- Line (negotiations for a particular item or service).
- Category (negotiations with lines in this category).
- Event (negotiations associated with this sourcing event).

Select a search parameter, enter a value for the parameter, and click Go.

**B.** The Active and Draft section shows negotiations in which you are participating either by having placed an active response, or by having a draft response that is in progress. Note that this section only displays the five negotiations with the most current expiration date. To see the complete list of invitations, click Full List.

- The Response Status column shows whether you have an active response against this negotiation or whether you are in the process of drafting a response.
- To see information on the negotiation, click the Negotiation Number link. This takes you to the negotiation summary page.
- To see your current response or draft information, click the Response Number link. This takes you to the Details page.

**C.** Your Company's Open Invitations section on the Negotiations Home page identifies the negotiations to which you have been invited. To access a negotiation, click its Number link. This will take you to the negotiation summary page from which you can perform additional tasks such as acknowledging participation, placing a response or viewing response history.

If your company has multiple sites that are known to the buyer who created the negotiation, a separate invitation might have been sent to each site. If this is the case, you may see multiple entries having the same negotiation number but associated with different sites. You can place a response on behalf of either or all sites.

**D.** The Quick Links section of the Negotiations Home page provides easy, one-step access to your most commonly performed Oracle Sourcing tasks. The links are organized by task and negotiation type so you can find the link for the task you wish to perform. Simply clicking the link takes you to the page where you initiate the operation.

## ***Negotiation Types***

### **Request for Information**

A Request for Information (RFI) sourcing document is different from other sourcing documents such as RFQ or buyer's auction. The purpose of RFQs and buyer's auctions is to negotiate line price and costs prior to generating a purchasing document. The purpose of an RFI is to gather information on goods and services a supplier company provides. RFIs may or may not be concerned with line price or costs. Buyers use responses to an RFI to qualify suppliers early in the procurement process. RFIs can have several rounds as buyers continually refine the groups of suppliers who can most closely supply the products and services the buyer is looking for. Once the appropriate group of suppliers has been identified, the RFI can be converted to an RFQ or buyer's auction, and the buyer can initiate a regular price/cost negotiation with the targeted suppliers.

### **Respond to RFI:**

On the Negotiations Home page, search for any open RFI to which you've been specifically invited. RFI to which you've been invited will appear under Open Invitations. Select the RFI by clicking on the number link.

On the Active Negotiations page, you can

- Select the negotiation and click Respond to create a response.
- Click the negotiation number link to view details of the negotiation.
- Click All Responses to view the responses to this negotiation.
- Click "Your Company's Responses" to see details of any current responses from users at your company.

- Click "Unread Messages" to view any online discussion messages.

From the Actions dropdown list, select Acknowledge Participation and click on Go.

You can put your message to the Buyer in the Note to Buyer section and click Apply. The Buyer will be notified by email that the supplier is interested in participating in the negotiation.

The system will take you back to the Active Negotiations Page. From the Actions dropdown list, select Create Response and click Go.

On the Terms and Conditions page, you can either accept or reject the negotiations conditions. If you click Cancel, you will not be able to participation in the negotiation.

Negotiations > RFI 518 >

Terms and Conditions

The following terms and conditions must be accepted before a response is placed in this RFI.

Cancel Accept

**CONFIDENTIALITY & DISCLAIMER**

This document contains VISA U.S.A. INC. proprietary information. This information is intended for use by respondents to assist in the preparation of responses to this RFI. Information contained in this document or brought to a vendor's attention as a result of the RFI process may not be copied, distributed or made otherwise available to any third party, in whole or in part, without the prior written consent of VISA U.S.A. INC. All such information may be disclosed solely to persons within vendor's organization on a need-to-know basis. Upon completion of this quotation process, all information/exhibits are to be destroyed or returned to VISA U.S.A. INC. as directed and agreed by VISA U.S.A. INC.

This document is a request for information only. There is no guarantee or warranty by Visa that a final agreement will be executed, or that Visa will enter into negotiations with any party. Notwithstanding any provision of this RFI, Supplier is hereby specifically advised that this request is an informal solicitation of information only. This RFI is not intended to be (nor is it to be construed as) the engaging in formal competitive bidding pursuant to any statute, code, ordinance, rule or regulation. The decision to enter into negotiations with any party or not to negotiate, as the case may be, regarding this RFI is at the sole discretion of Visa. The issuance of this RFI and any responses hereto shall not be construed as creating any expressed or implied commitment or obligation by Visa or any third party.

All costs associated with the preparation of your response to this RFI and other expenses incurred in connection with this RFI shall be borne solely by the Supplier.

Cancel Accept

Respond Online

On the Create Response page, enter the response values. Since the purpose of an RFI is to obtain product and service related information for a negotiation line, most negotiation lines in an RFI have attributes defined. These line attributes identify the questions the buyer has about a particular line.

Negotiations > RFI 518 >

Create Response: 226 (RFI 518)

Cancel View RFI Respond By Spreadsheet Save Draft Continue

Header

Title	RFI Audit Services	Time Left	9 days 19 hours
Supplier Site	MINNEAPOLIS	Close Date	13-Oct-2007 14:29:18
RFI Currency	USD	Response Valid Until	<input type="text" value="13-Oct-2007 14:29:18"/>
Response Currency	USD		(example: 19-Sep-2007)
Price Precision	Any	Reference Number	<input type="text"/>
		Note to Buyer	<input type="text"/>

Attachments

Add Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Attributes

Group	Attribute	Attribute Type	Target Value	Response Value
General	Supplier Information	Required		<input type="text"/>

Cancel View RFI Respond By Spreadsheet Save Draft Continue

The Attribute Type column shows you whether a response is required or optional. If the buyer has chosen to display an attribute target, this value appears in the Target Value column. The response value is limited to 4000 characters. If the response is greater than 4000 characters, provide an executive summary in this section and provide detailed information in the Attachment.

**NOTE: The Buyer will use the information provided in the Response Value field to compare supplier responses. It is very important for suppliers to provide a summarized response in this section. Your response may be disqualified or rated poorly if the information is not provided in this field.**

### Notes and Attachments

In addition to the typical negotiation information, on occasion the buyer may need to communicate or request additional information such as specialized requirements. The buyer can use the note text box for short communications or use attachments for larger amounts of information. Notes and attachments can be assigned to the negotiation header or the negotiation lines.

To view the notes and attachments:

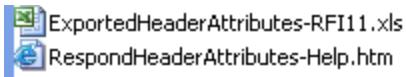
1. From the Negotiations Home page, click the negotiation number link under Your Company's Open Invitations to view negotiations to which you have been invited. Alternately, search for an open negotiation by selecting a search criterion, providing a search value and clicking Go.
2. Click the negotiation number link to display the negotiation summary page.
3. The negotiation summary page displays all the information on the negotiation broken down into a tab-oriented form so you can easily view the information contained in the different sections of the negotiation. By default, the page displays the negotiation header information.
4. Click the Lines subtab to see details of the negotiation lines. To see the detail information for each line, click that line's number link. On the Line: page, you see any notes and attachments assigned by the buyer to the line.
5. Once you have viewed all your attachments, click Return to Negotiations to return to the negotiation summary page. From this page you can continue placing a response.

### Respond by Spreadsheet

The Supplier also has the option to respond to header attributes and lines by Spreadsheet. Click on Respond by Spreadsheet:

The screenshot shows the 'VISA Sourcing' interface for 'Create Response 27: Response By Spreadsheet (RFI 11)'. The page is divided into two main sections: 'Step 1: Export Spreadsheet' and 'Step 2: Import Spreadsheet'. In Step 1, there is a 'Type' dropdown menu currently set to 'Lines', with 'Header Attributes' also visible as an option. In Step 2, there is a 'File To Import' field with a 'Browse...' button and an 'Import' button. The page includes a 'Return to Create Quote 27 (RFI 11)' link at the bottom left and navigation links like 'Negotiations | Home | Logout | Preferences | Help' at the bottom right. The footer contains 'Copyright (c) 2006, Oracle. All rights reserved.' and a 'Privacy Statement' link.

Select Header Attributes. Click on Export to launch Winzip. Click next until you see the files, click on the spreadsheet.



Open the file and provide your responses in Column G, Response Value.

**NOTE: Do not add or remove lines or columns on the spreadsheet as this will result in errors when you import the file.**

	A	B	C	D	E	F	G	H	I
1	RFI Number	Attribute	Group	Attribute Title	Value Type	Target Value	Response Value	* End of line delimiter	
2	11	RFx (RFI)	Title	Display Or Text		Title:		EOL	
3	11	RFx Date	Title	Display Or Text		RFx Date:		EOL	
4	11	Cover Letter	Cover Letter	Display Or Text		Cover Letter		EOL	
5	11	Sourcing Specialist	Visa Inform	Display Or Text		Sourcing Specialist-Name		EOL	
6	11	Sourcing Specialist	Visa Inform	Display Or Text		Sourcing Specialist-Title		EOL	
7	11	Sourcing Specialist	Visa Inform	Display Or Text		Sourcing Specialist-Phone		EOL	
8	11	Visa Project Owner	Visa Inform	Display Or Text		Visa Project Owner-Name		EOL	
9	11	Visa Project Owner	Visa Inform	Display Or Text		Visa Project Owner-Title		EOL	
10	11	Visa Project Owner	Visa Inform	Display Or Text		Visa Project Owner-Phone		EOL	
11	11	Overview of Visa	Overview	Display Or Text		Overview of Visa: Description of Visa and our business		EOL	

Once responses are completed, save the file on the desktop. Import the spreadsheet by clicking Import.

The negotiation document reflects the imported values. You can still edit the values online after importing. After entering values as needed, click Continue. This returns you to the Create Response: Review and Submit page.

Verify your response information for accuracy. Click Edit to update any incorrect information.

Note: If for some reason you do not wish to submit your response immediately, click Save Draft to save your response information for a later session. Your draft will be assigned a number which you can use later when accessing the draft for editing or completion. You can access your draft responses by clicking the Manage Draft quick link from the Negotiations Home page. You can access the draft for editing or for submission.

Confirmation

Response 26 for RFI 11 (Web Consulting Services) has been saved as a draft.

Your draft responses are always available from the [Manage Draft Responses](#) page.

[Continue editing your draft.](#)

Drafts can be used to spread the response definition over several sessions. This is common in situations where the response is complex and requires the input of several collaborators. In this case, the draft can be accessed and edited as needed until the final version is ready for submission.

If multiple responses are allowed, a single supplier organization can have multiple draft responses against the same negotiation; however, a single supplier user can only have one draft response outstanding against a single negotiation. If a single best bid situation is in effect, a supplier organization can have only one draft response against a particular negotiation.

When you are satisfied with your response, click Submit on the Create Response: Review and Submit page. A Warning message appears if the Buyer restricted the negotiation to a single best response from each supplier.

Warning

Buyer has requested for you to submit a single, best response. Multiple responses for this RFI are not allowed.

Create Response 26: Review and Submit (RFI 11)

Header

Title	<b>Web Consulting Services</b>	Time Left	<b>23 hours</b>
Supplier Site	<b>LOS ANGELES</b>	Close Date	<b>14-Sep-2007 16:24:04</b>
RFI Currency	<b>USD</b>	Response Valid Until	<b>14-Sep-2007</b>
Response Currency	<b>USD</b>	Reference Number	
Price Precision	<b>Any</b>	Note to Buyer	

Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Click on Submit.

Confirmation

Response 26 for RFI 11 (Web Consulting Services) has been submitted.

[Return to Sourcing Home Page](#)

At this point the only option available to the supplier is Online Discussions and View Response History.

[Negotiations](#) >

Response: 26 (RFI 11)

Title <a href="#">Web Consulting Services</a>		Close Date <b>14-Sep-2007 16:24:04</b>	
Time Left <b>22 hours 57 minutes</b>	Style <b>Blind</b>	Supplier <b>TENROX</b>	Supplier Site <b>LOS ANGELES</b>
Response Currency <b>USD</b>	Contact <b>Thomas, Mr. Tom</b>	Response Valid Until <b>13-Sep-2007 17:00:00</b>	
Suppliers' Response Number	Response Status <b>Active</b>		
Note to Buyer			

Attachments: No results found.

Actions

- [Online Discussions](#)
- [Online Discussions](#)
- [View Response History](#)

**Attributes**

Previous 25 51-53 of 53 Next

[Show All Details](#) | [Hide All Details](#)

Details Group

- [▶ Show Scalability - Services](#)
- [▶ Show Support and Maintenance - Services](#)
- [▶ Show Warranty - Services](#)

## Request for Quote and Auctions

### Respond to RFQ and Auctions:

Navigate to the negotiation summary page for the negotiation to which you wish to respond by clicking its negotiation number link under the Open Invitations section of the Negotiations Home page. Alternatively, you can enter search values into the Search Negotiations fields and click Go to list all negotiations in the system, including ones to which you were not explicitly invited to. On the Active Negotiations page, find your negotiation and click the negotiation number link there. You can see details of the negotiation on the negotiation summary page. If you want to view any responses that have already been submitted, click View Quote History/View Bid History. You can only see the existing responses when the negotiation is open or unsealed.

To submit response online:

1. On the negotiation summary page, select Create Quote/Create Bid from the Actions menu to create a response to the negotiation.
2. If the buyer has defined Terms and Conditions, you are asked to read and accept the negotiation terms and conditions. After reading the terms and conditions, click Accept.

Negotiations > RFQ: 522 >  
 Create Quote: 231 (RFQ 522)

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

Header

Title	Test RFQ	Time Left	11 days 23 hours
RFQ Currency	USD	Close Date	20-Oct-2007 15:21:35
Quote Currency	USD	Quote Valid Until	22-Oct-2007
Price Precision	Any	Reference Number	Computer Sales RFQ
		Note to Buyer	Thank you for inviting us to participate.

Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Attributes

Group	Attribute	Attribute Type	Target Value	Quote Value
General	Parent Company	Optional		XYZ Company
General	D&B Number	Required		1234
General	Number of Locations in US	Required		2
General	Number of Locations Worldwide	Required		1
General	Number of Employees	Required		500

Lines

TIP To respond to Lines, click on update pencil.

Indicates more information requested. Click on the Update icon.

Line	Update	Ship-To	Rank	Start Price	Target Price	Quote Price Unit	Target Quantity	Quote Quantity	Promise Date
1		Visa USA	Sealed			1000 EACH	10	10	22-Oct-2007 15:47:56

3. On the Create Quote/Create Bid page, enter the following information.

- Quote Currency (Bid Currency).  
 The buyer might allow quotes/bids in currencies other than the RFQ/auction currency (the currency used to create the RFQ or auction). If so, you can select the currency in which you will place your quote/bid.
  - Note: Before you select a currency, all response prices (such as start price and target price) will be listed in the RFQ/auction currency. After you select a currency, you will see all prices listed in your chosen currency.
  - If the buyer has allowed it, you can see the exchange rate for currencies other than the response currency.
- Quote Valid Until (Bid Valid Until)  
 Enter the date on which your bid or quote expires. You can use the pop-up calendar to select a date.
- Reference Number  
 A number you can assign for your own internal tracking. This is different from the quote/bid number which is generated by the system, assigned automatically, and cannot be edited. The buyer can view this value.
- Note to Buyer  
 You can enter a short text note to the buyer.
- Attachments  
 Click Add Attachments and use the Add Attachment page to supply the buyer with any additional information on, or specifications about your response.
- Attributes  
 If there are any header level attributes, they are displayed in the Attributes table. See the Attribute column for an explanation of the attribute. Enter your response in the Bid Value/Quote Value field.
- Power Bid (when rebidding in an auction only)  
 If you are rebidding and wish to use the Power Bid functionality, enter a number representing the percentage by which all your bid prices should be updated. Click Recalculate to display your new prices. Note that the buyer may have defined a minimum value by which prices must change, and

if your new bids are not acceptable, you receive an error message. Power Bid is disabled if any of the negotiation items contain price elements.

- Proxy Bid Decrement (auctions only)

If the buyer allowed proxy bidding, enter the value by which you wish your bid to be reduced. This can represent either a percentage or monetary amount depending on the settings defined by the buyer. If the buyer wants the bid to decrease by a monetary amount, the currency sign will appear after the Proxy Bid Decrement field. If the buyer wants the bid to decrease by a percentage, a percent sign will appear after the Proxy Bid Decrement field. Proxy bids are not applied to any item having a price element. If all items in the auction have price elements, proxy bidding is disabled and this box does not appear.

- Quote/Bid Price

Your price for one unit of the item or service. If a line contains price elements, this field is display only, and you enter your price in the Bid/Quote Value field for the Line Price element.

- Bid Proxy Minimum(auctions only)

If the auction allows proxy bidding, enter your minimum bid. If the bidding drops below this amount, automatic bidding on your behalf is discontinued, and you must enter new bids manually. You can rebid specifying new proxy bid values.

- Quote Quantity/Bid Quantity

Number of units on which you are Quoting/Bidding. If the buyer set bid controls to allow only full quantity bids, this field is display only and shows the quantity entered by the buyer. If Quantity has been scored and weighted, this field is display only, and you enter your quantity value in the Quantity attribute for the line.

- Promise Date

Use the pop-up calendar to enter the date by which you will deliver the item or service. If the negotiation outcome is Standard Purchase Order or this attribute is weighted, Promise Date is required.

- Attributes

If there are line attributes defined for this line, enter your responses to each attribute. The Attribute Type column shows whether a response is required or optional.

- Price Elements

Price elements are displayed if they have been added to an item by the buyer.

- Bid Value

Enter your value for this price element. When you click Continue, the item price, the bid value and the pricing basis are used to calculate the bid price.

- Pricing Basis

The method by which this price element is used to calculate the bid price:

- Per-Unit - The value is multiplied by the quantity of units bid and added to the item price.
    - Fixed Amount - The value is divided by the quantity of units bid and added to the item price.
    - % of Item Price - The value is divided by 100, and then multiplied by the item price, and the result added to the item price.

- Price Breaks

If there are price breaks defined for this item, click the "Click here. » line to enter your price break responses.

- Note to Buyer

If necessary, enter a text note to the buyer to supply additional information on your response to this line.

- Add Attachments

You can attach additional line information to your bid. You might wish to do this to respond to any attachments from the buyer or simply to include detailed information. If you have added attachments, you see the paperclip attached to a page of paper.

After entering values as needed, click Continue. This returns you to the Create Quote/Bid: Review and Submit page.

Verify your response information for accuracy. Click Edit to update any incorrect information.

When you are satisfied with your bid, click Submit.

Note: If for some reason you do not wish to submit your response immediately, click Save Draft to save your response information for a later session. Your draft will be assigned a number which you can use later when accessing the draft for editing or completion. You can access your draft responses by clicking the Manage Draft quick link from the Negotiations Home page. You can access the draft for editing or for submission.

Drafts can be used to spread the response definition over several sessions. This is common in situations where the response is complex and requires the input of several collaborators. In this case, the draft can be accessed and edited as needed until the final version is ready for submission.

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