Supplier Creation in R12: New User Interface, Richer Functionality

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Agenda

- Session Objectives
- Supplier Creation in R12
  - User Interface Changes: The “Makeover”
  - Functionality Enhancements
    - Summary of Enhancements
    - Enhancement Details
- Inclusion of Suppliers in TCA
  - TCA: Introduction and Key Terms
  - Benefits of TCA
- Conclusion

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Session Objectives

- Understanding the User Interface Related Changes for Supplier Creation in Release 12
- Understand the functionality enhancements in Release 12 vis-à-vis Oracle 11i
- Understand key benefits of inclusion of supplier entity in TCA

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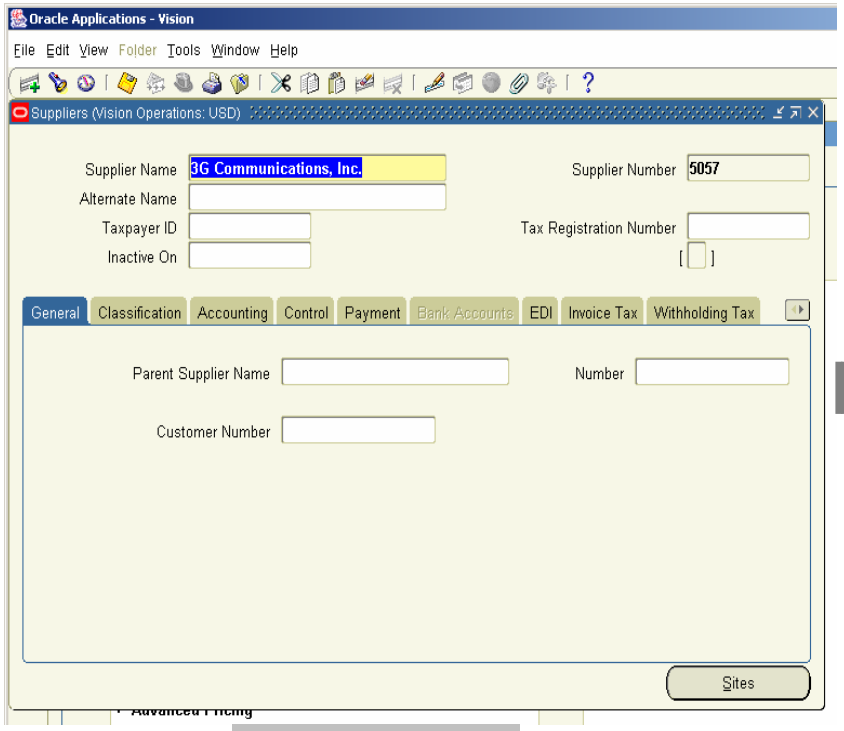
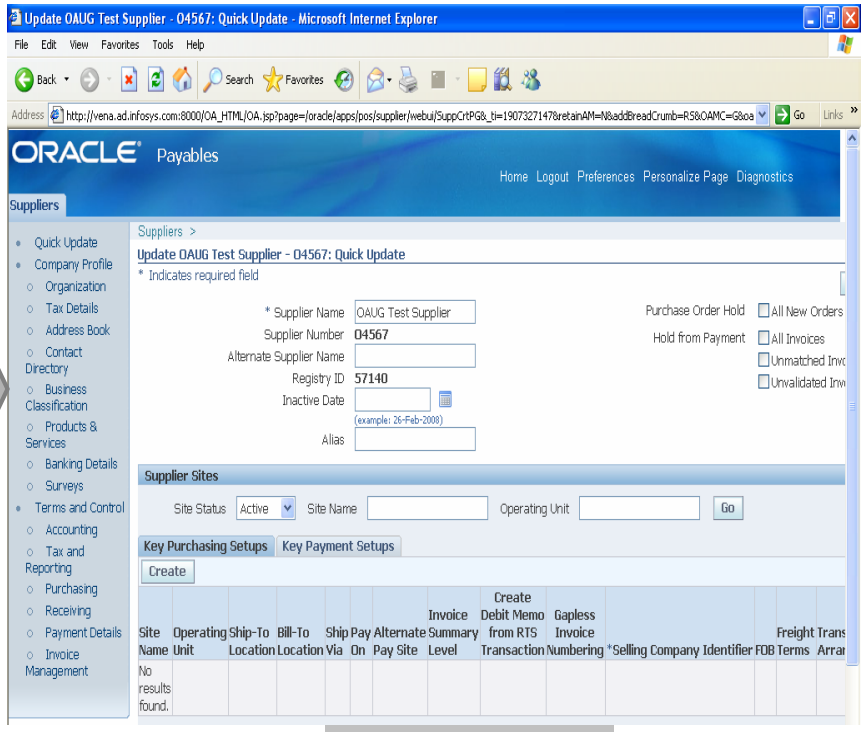
Supplier Entry: New User Interface

- The user interface for supplier creation has changed from a forms based entity in 11i to a HTML page in Release 12



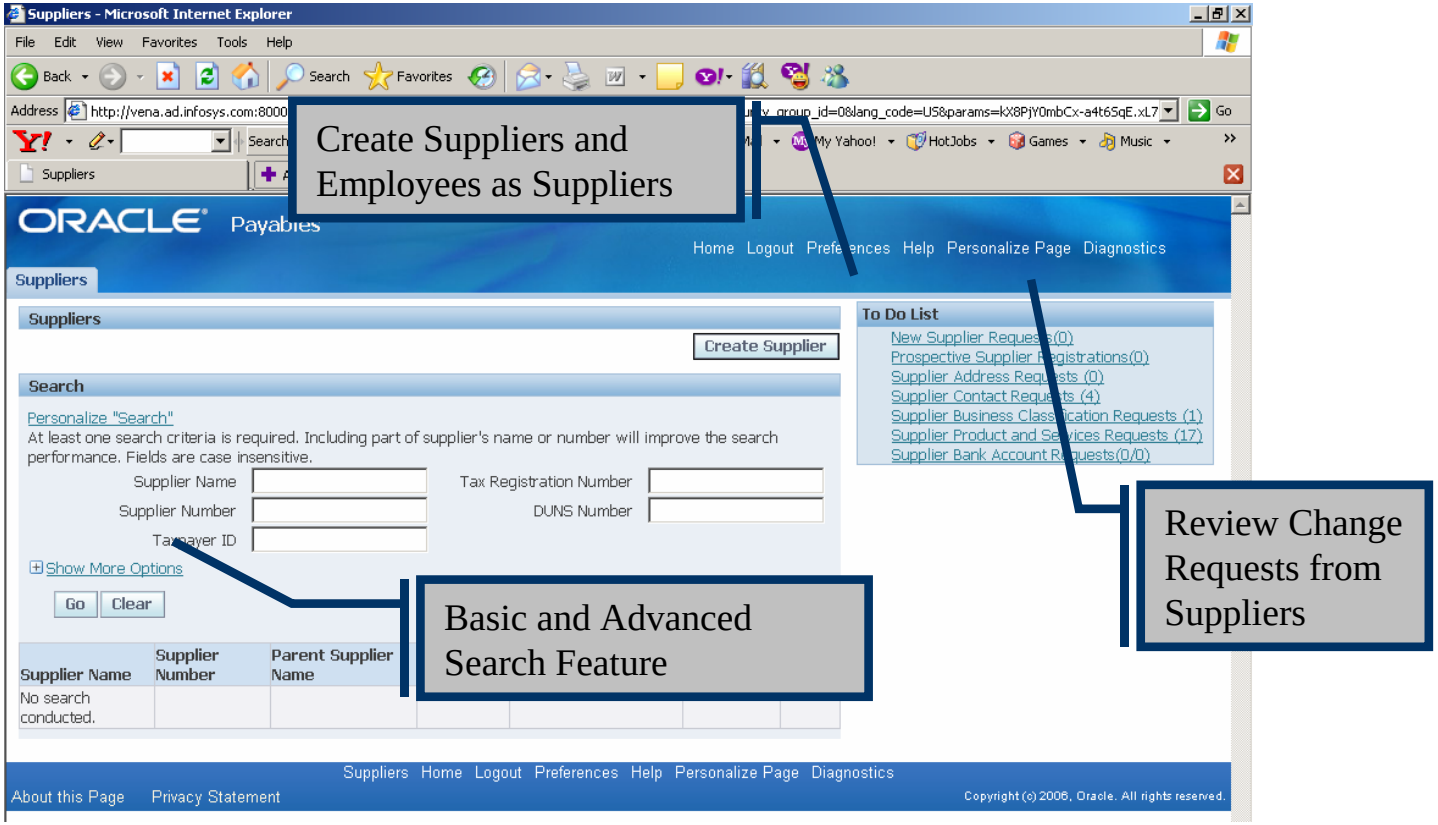


11i

Release 12

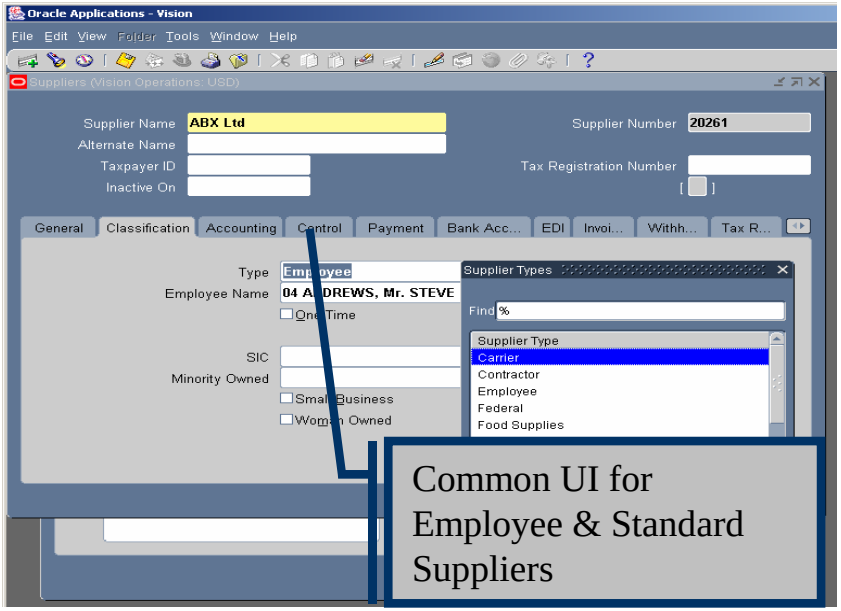
Main Supplier Page

- The main supplier page has 3 distinct sections—Create Supplier, Basic/Advanced Search and To Do List Section



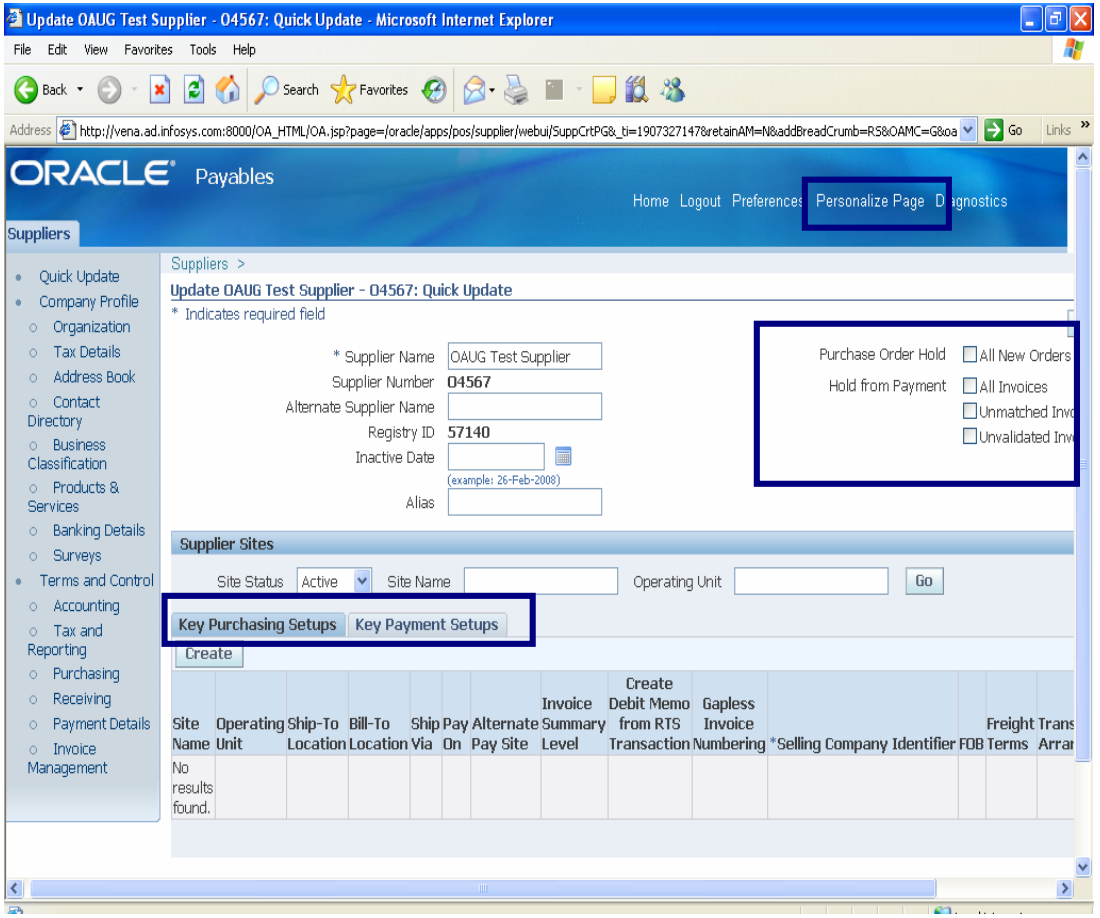
Standard Supplier vs. Employees

- Separate Navigation is provided for Standard Suppliers and to create employees as suppliers



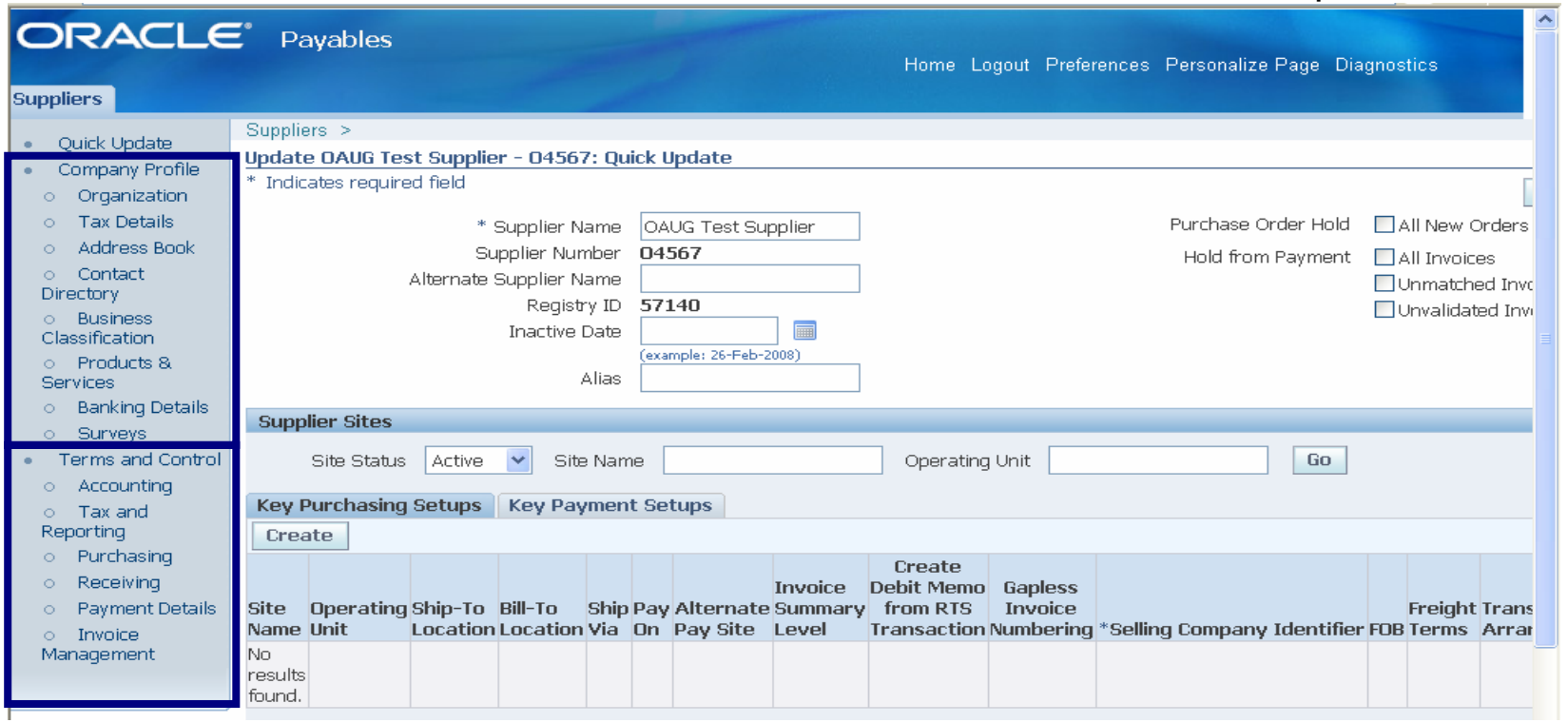
Supplier Quick Update

- Quick Update Page is the default page for supplier profile maintenance
- Hold Information and purchasing/payable attributes can be captured for supplier sites
- The page can be personalized for each user



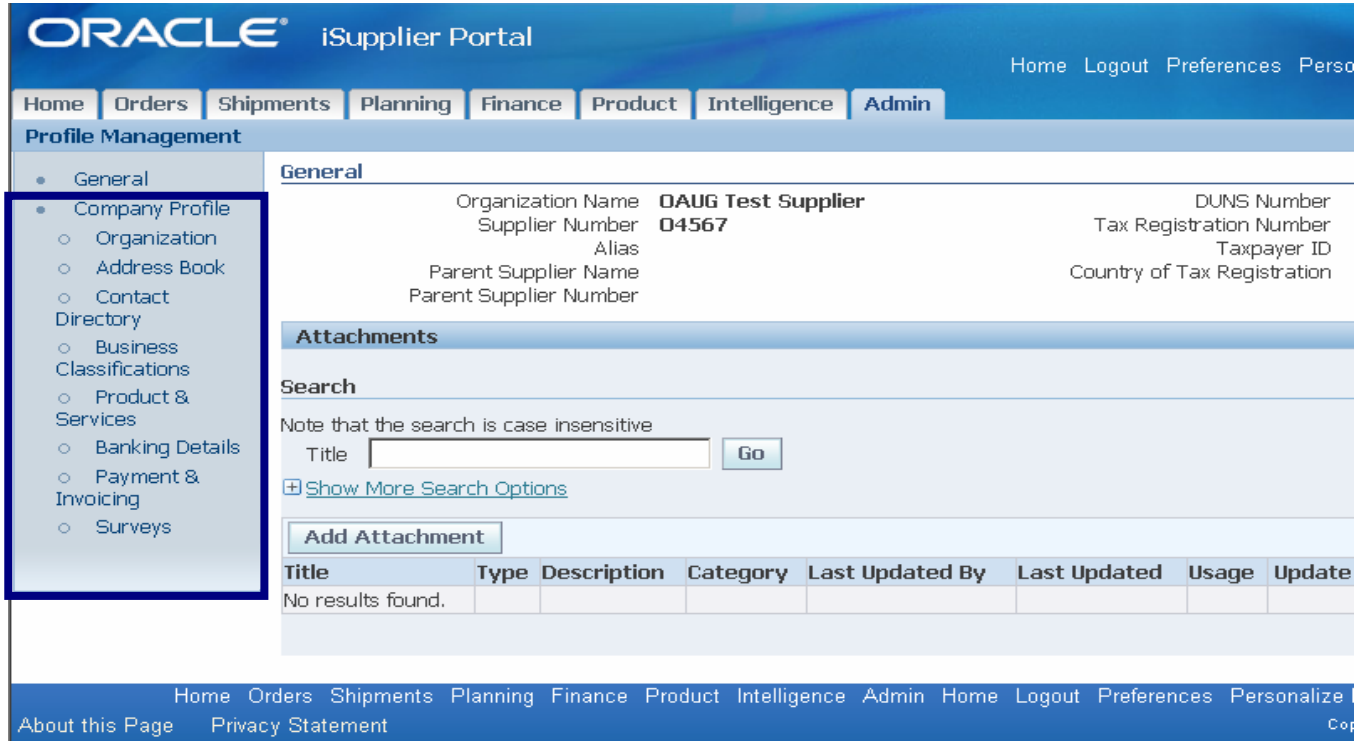
Supplier Profile Information

- Supplier Profile Information is classified into two main sections:
  - Company Profile: Organization & Business Information of supplier
  - Terms and Controls: Control information for the business relationship



Integration with iSupplier Portal

- Company Profile information is tightly integrated with iSupplier Portal
- Supplier contacts can update the profile and it raised a change request to be approved by an internal administrator



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Functionality Enhancements: Summary

Entity Name	Change from 11i	Change Details
Organization	↑	Company information can be captured in additional sections like:: ➔Organization level Details ➔Employee Details ➔Tax and Financial Details
Tax Details	↑	➔Enhanced integration with e-Business Tax. ➔Transaction tax attributes like default controls, tax registrations ,associated fiscal classification etc. can be maintained
Address Book	↑	➔Supplier Locations are created as addresses ➔Addresses can be converted to supplier sites for multiple operating units based on user's MOAC profile ➔Addresses can be created/updated from iSupplier Portal and go through a change request process ➔Addresses have statuses of New, Change Pending and Current

Legend: ↑ Enhanced Feature + New Feature ⟷ No Change

Functionality Enhancements: Summary (Contd.)

Entity Name	Change from 11i	Change Details
Contact Directory		➔Contact information can be maintained at a supplier level ➔User accounts can be created for contact and responsibilities can be attached ➔User Access restrictions can be setup to restrict site/contact update ➔Contacts can be added/updated from iSupplier Portal and goes through a change request process ➔Contacts have statuses of New, Change Pending and Current
Business Classification		➔Classifications can be setup based on nature of business of the supplier ➔Classification can be added/updated from iSupplier Portal and goes through a change request process ➔Classifications have statuses of Pending or Approved
Products & Services		➔Types of goods and services provided by the supplier can be categorized ➔Categories can be assigned by supplier from iSupplier Portal and goes through change request process ➔Product and service assignments have statuses of pending or approved

Functionality Enhancements: Summary (Contd.)

Entity Name	Change from 11i	Change Details
Banking Details		➔Banking account assignments can be made at four levels—Supplier, Site, Address Level, Address+OU level ➔New Banks accounts and factor accounts can be created ➔Banking Information can be created/updated from iSupplier Portal and go through the change request process ➔New bank accounts can be approved or go through a verification process
Survey		➔Custom questionnaires can be created and administered to suppliers to gather their feedback

Functionality Enhancements: Summary (Contd.)

Entity Name	Change from 11i	Change Details
Accounting		➔Attributes remain unchanged
Tax and Reporting		➔Supplier tax and reporting information can be maintained at a supplier and supplier site level ➔Additional attributes have been provided
Purchasing		➔Attributes remain unchanged
Receiving		➔Attributes remain unchanged
Payment Details		➔Payment details (via different channels incl..EDI) and remittances instructions can be maintained ➔Additional attributes have been provided
Invoice Management		➔Attributes remain unchanged

Legend: Enhanced Feature New Feature No Change

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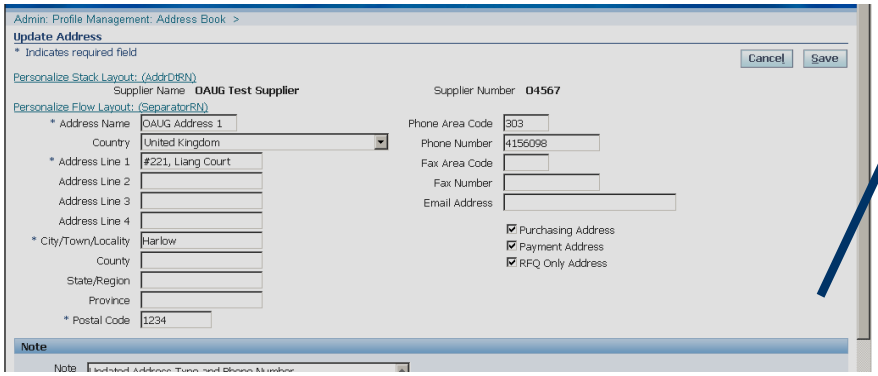
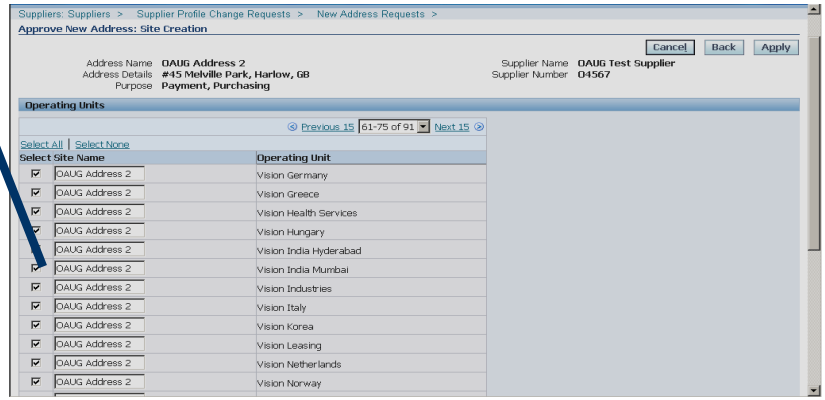
Supplier Site Creation

- Supplier Locations are first created as addresses in the Address Book
- Addresses can be converted to sites for the OUs in the MOAC profile



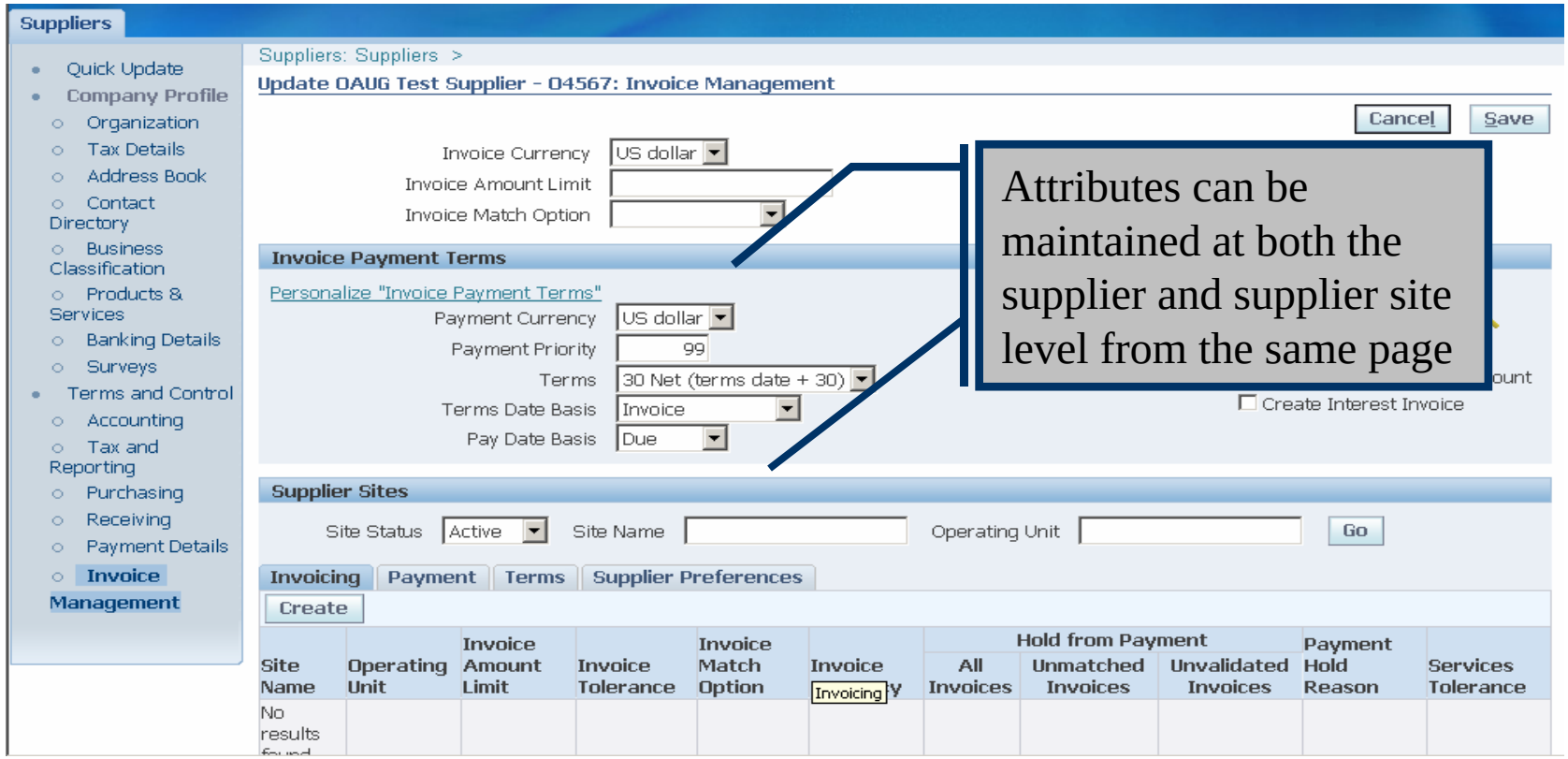
Supplier Locations can be created/updated as addresses in the Address Book

➔Supplier Sites can be created for multiple operating units
➔Operating Units which are part of the MOAC profile are visible



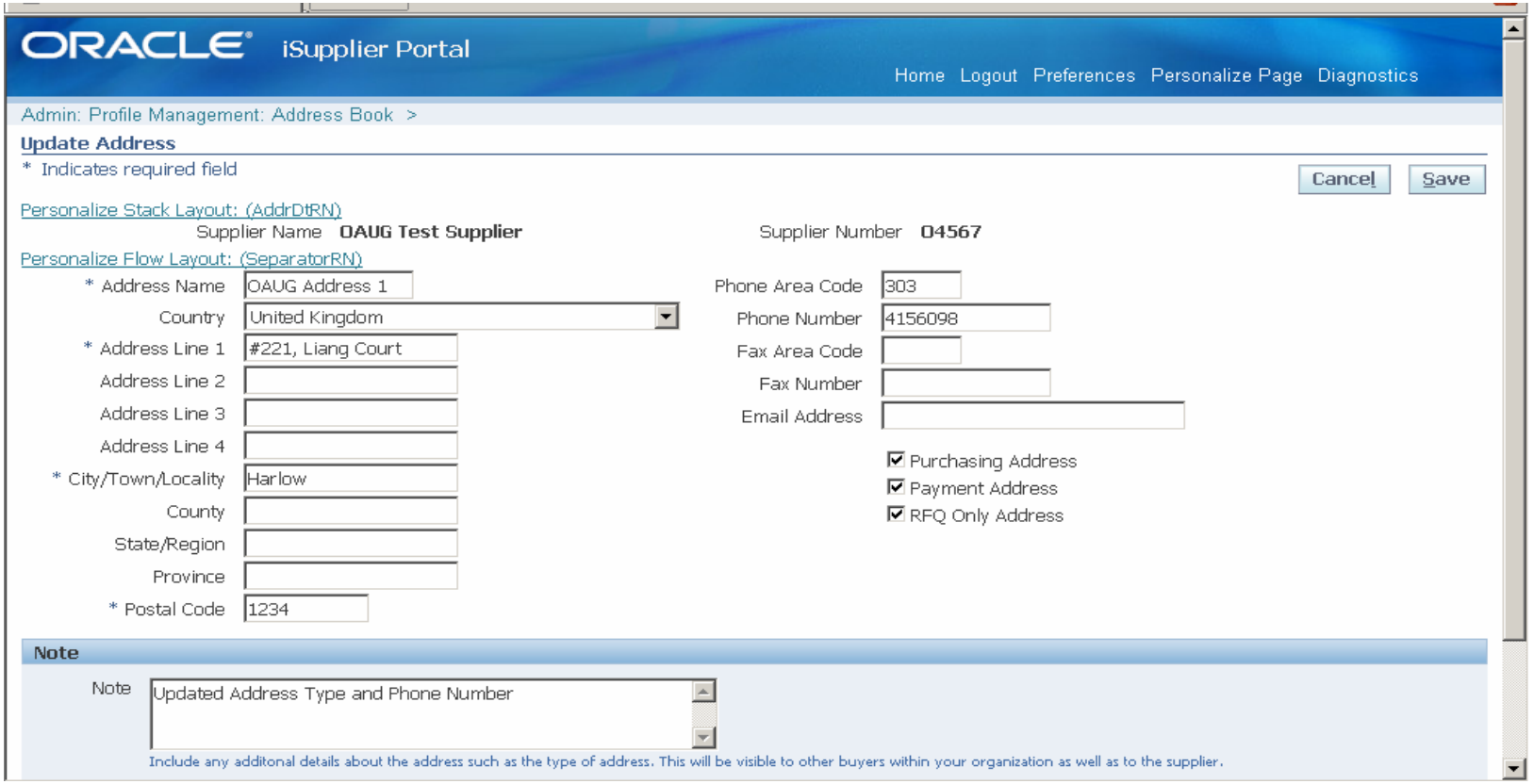
Supplier/Site Level Attribute Maintenance

- Supplier/Site Level Attribute Maintenance is streamlined in Release 12



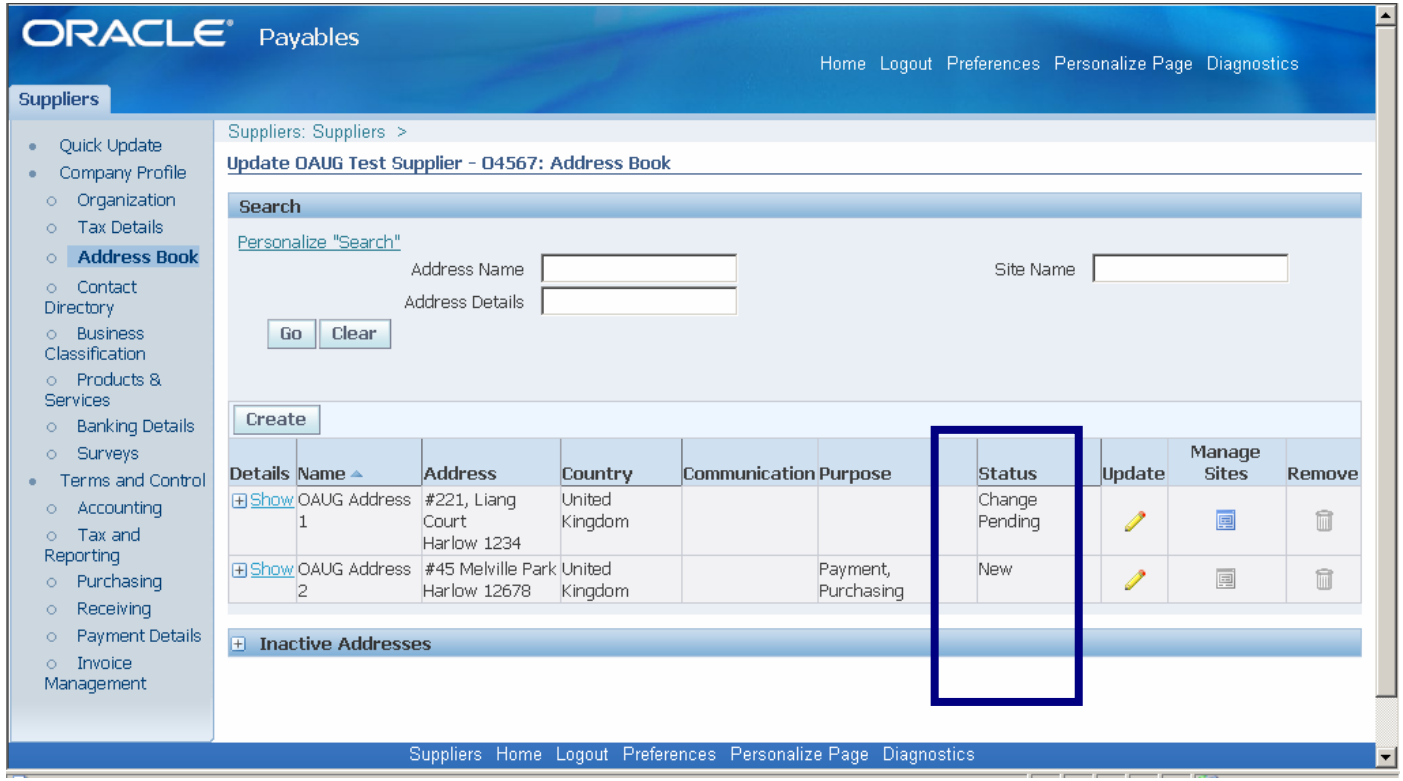
Address Book Update

- **New Address can be created and existing Address can be viewed/updated in iSupplier Portal by Supplier Contacts**



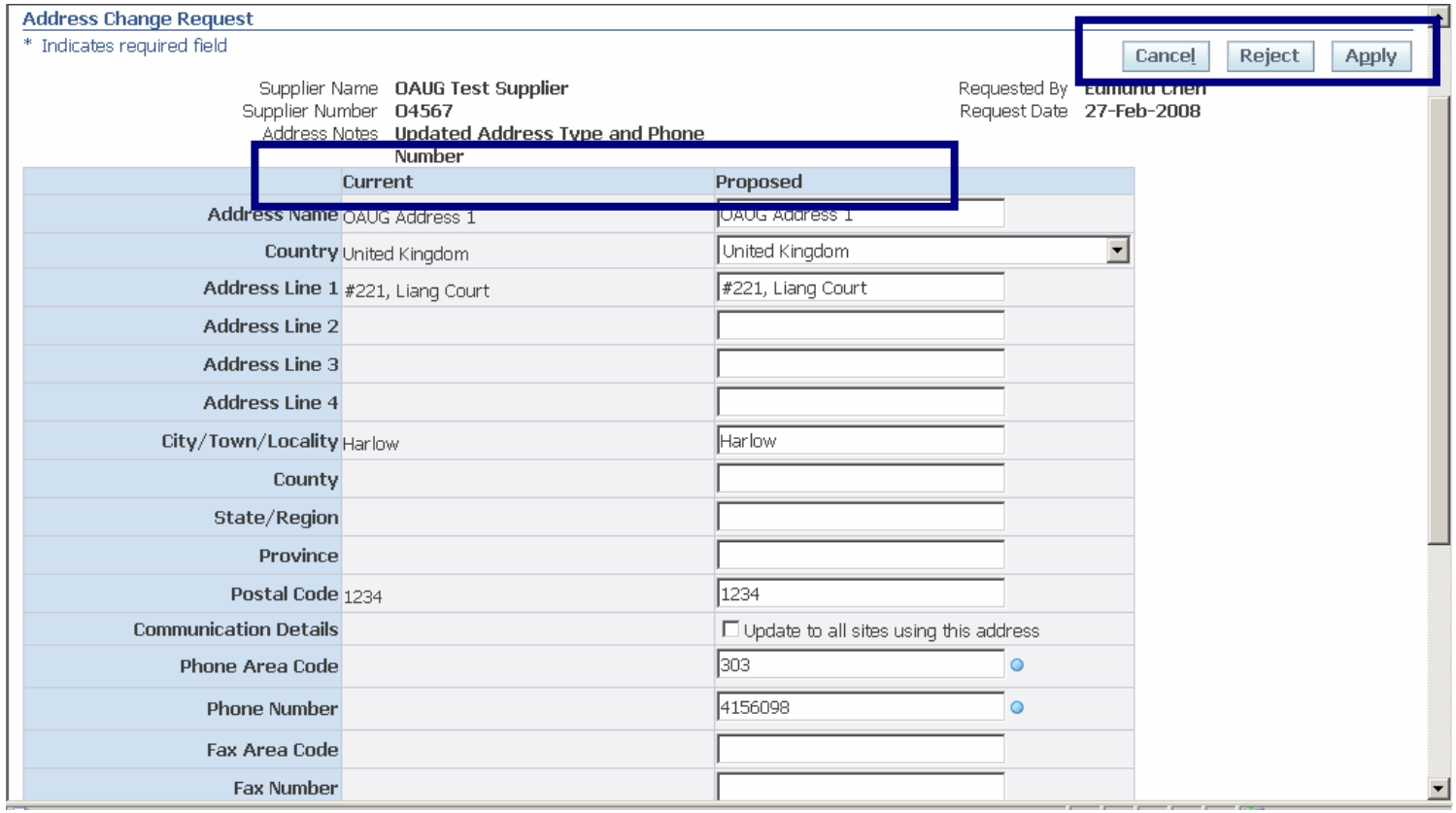
Address Book Update (Contd.)

- **Creation or Update from iSupplier Portal triggers a change request process**
- **The addresses are appear in status “New” or “Change Pending” so that an internal administrator can approve the change**



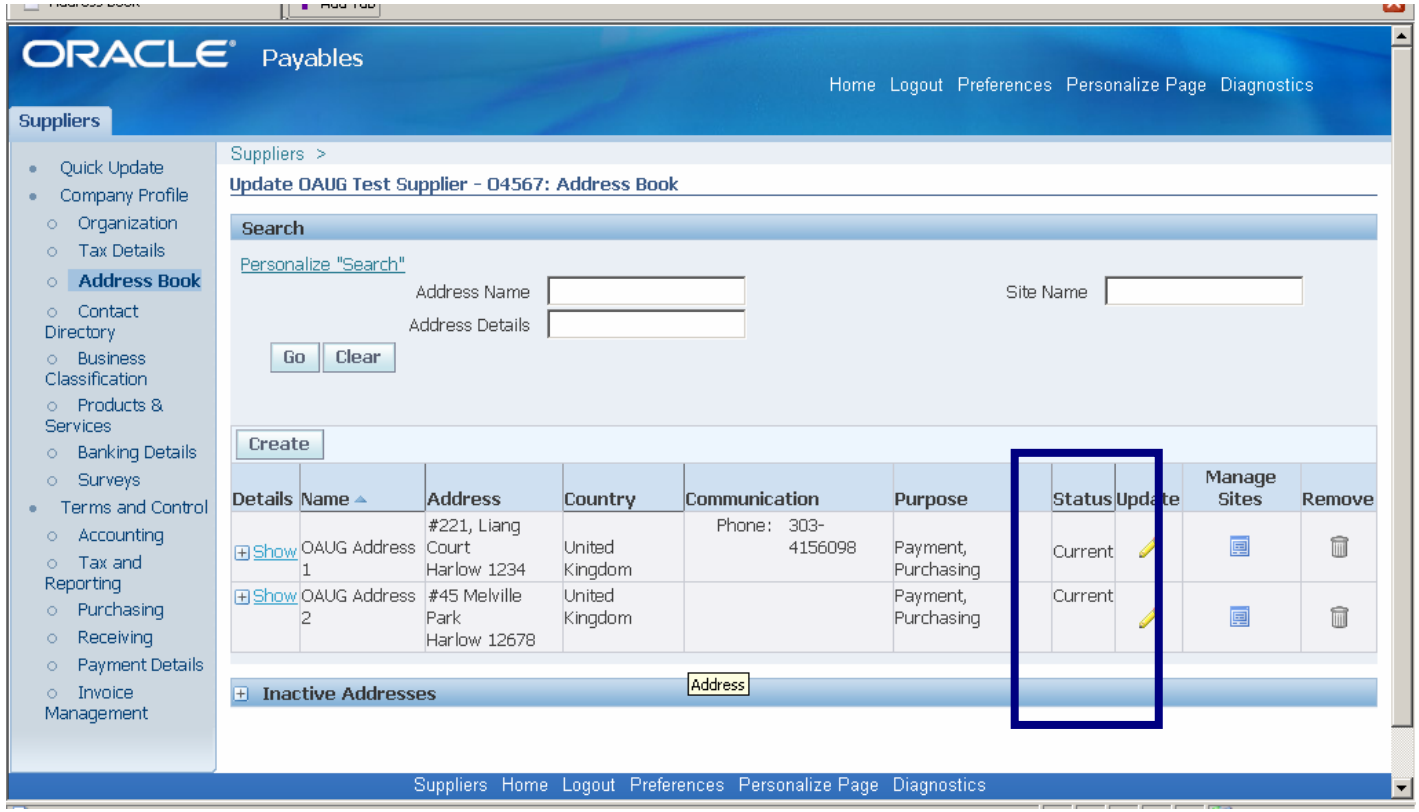
Address Book Update (Contd.)

- **For an address update, a change history is provided to the internal administrator to facilitate approval**



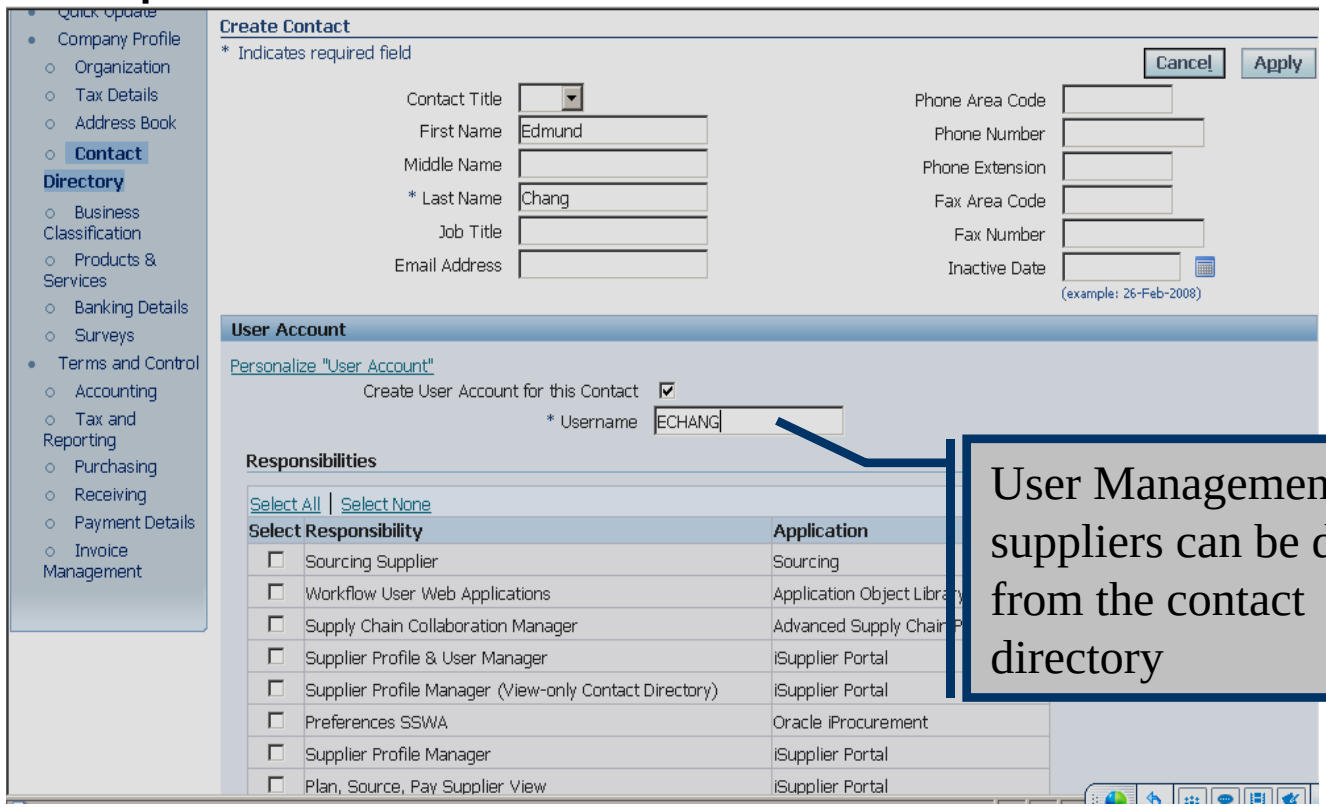
Address Book Update (Contd.)

- **The status of the address changes to “Current” once the change request is approved**



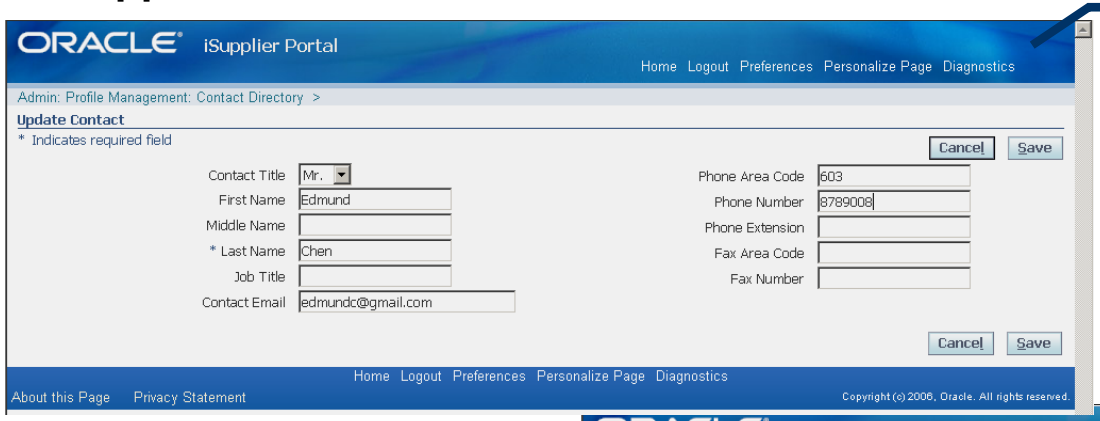
Contact Directory

- **Contacts Details can be added/updated for each supplier**
- **User Accounts can be created from the same page and access restrictions can be setup.**



Contact Directory Update

- **Contacts Details can be added/updated from iSupplier Portal**
- **A change request process is initiated for contacts added/modified through iSupplier Portal**

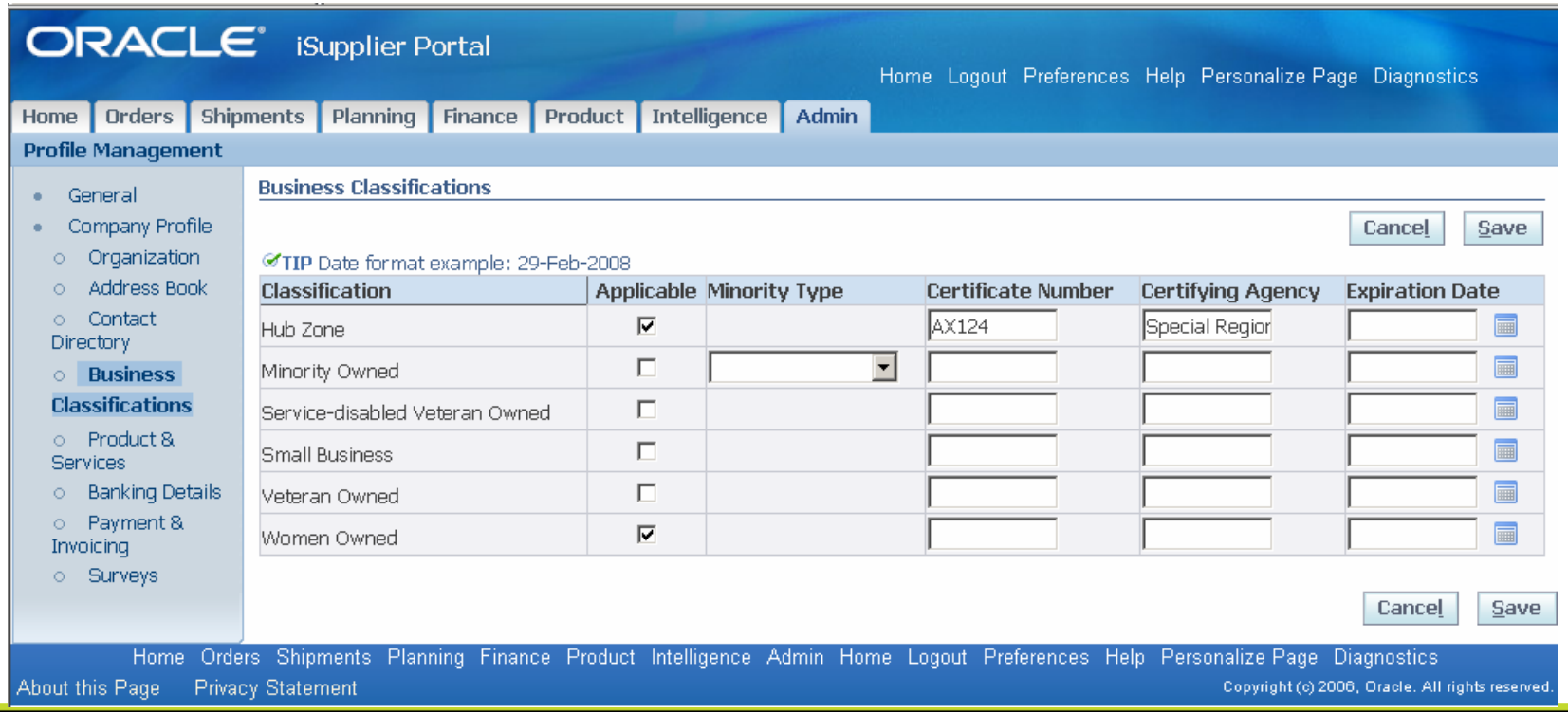


Contact information change from iSupplier Portal

Contact Status can be “New”, “Change Pending" or “Current”

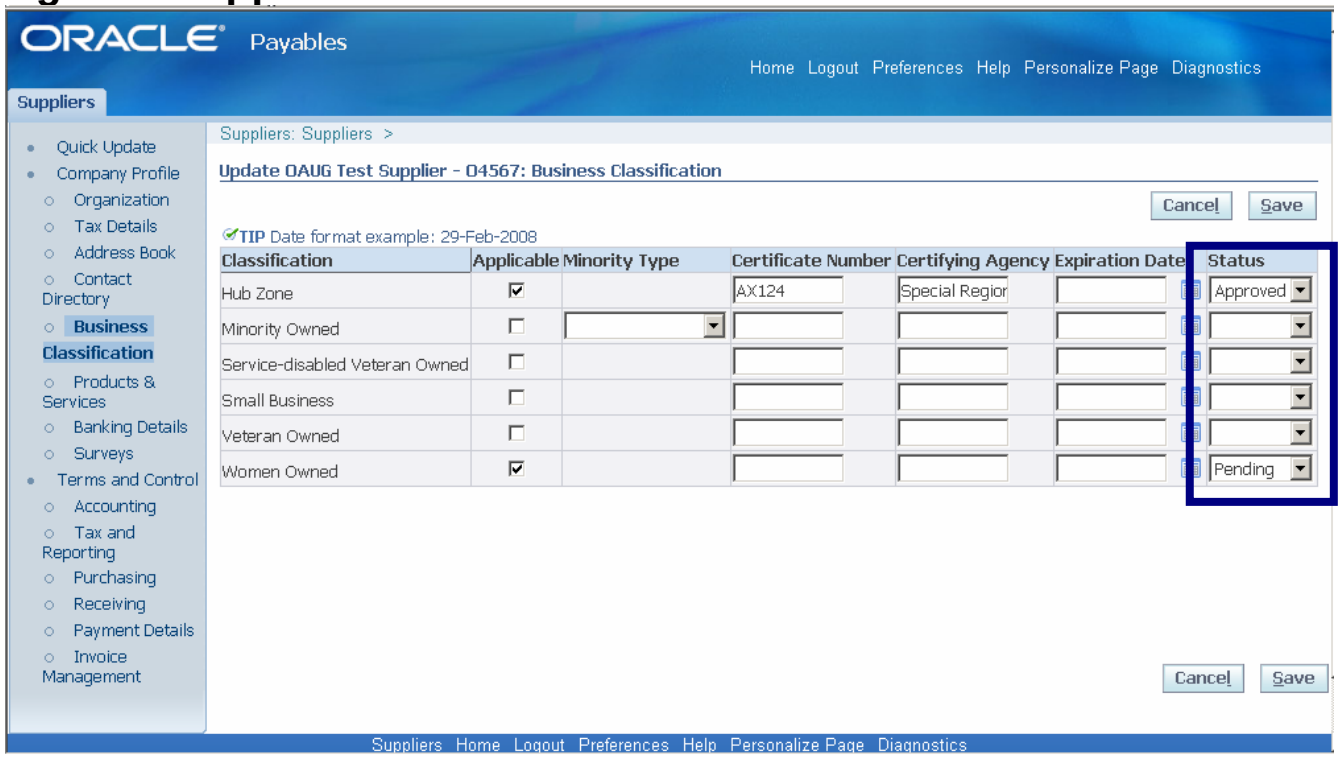
Business Classification

- **Business Classification for Supplier can be entered by a Buyer Administrator or by the supplier contact in iSupplier Portal**
- **Classifications entered through iSupplier Portal initiate a change request process and require approval**



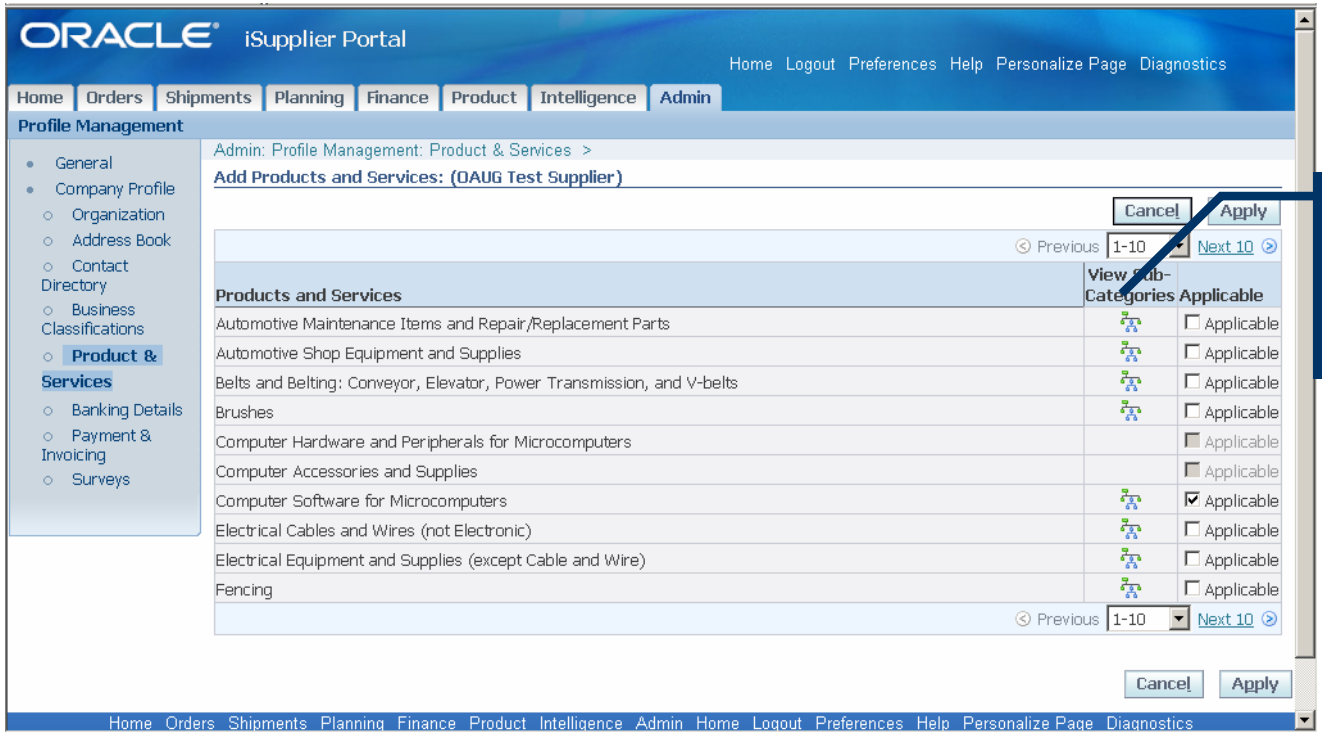
Business Classification Update

- **Business classifications created/updated from iSupplier Portal would be in "Pending" Status**
- **The buyer administrator can approve the classification and the status changes to "Approved"**



Product & Services Categories

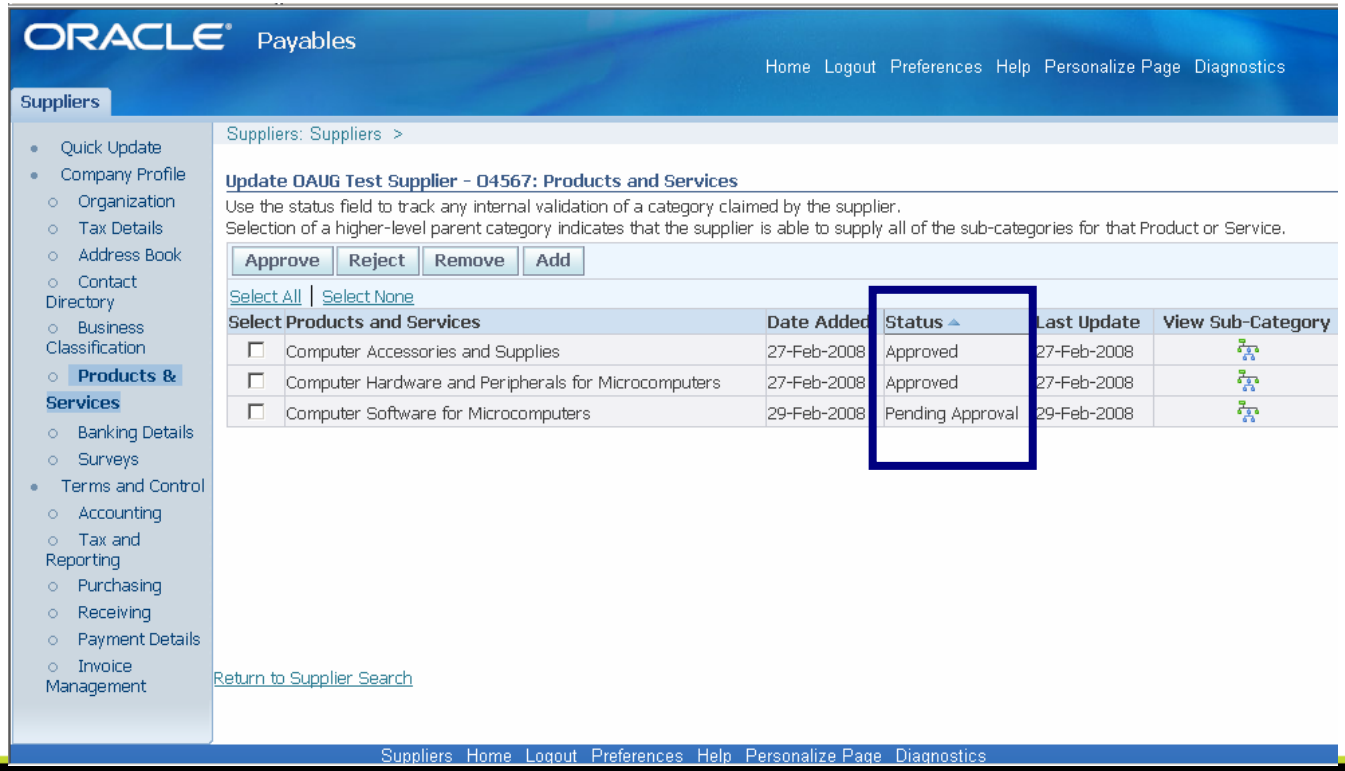
- **Categories/Sub-Categories of Products & Services sold by the supplier are maintained at Supplier Level in release 12.**
- **Product/Service Category information can be entered either from Payables or iSupplier Portal**



Category/Sub-Category of Product/Services can be entered from iSupplier Portal

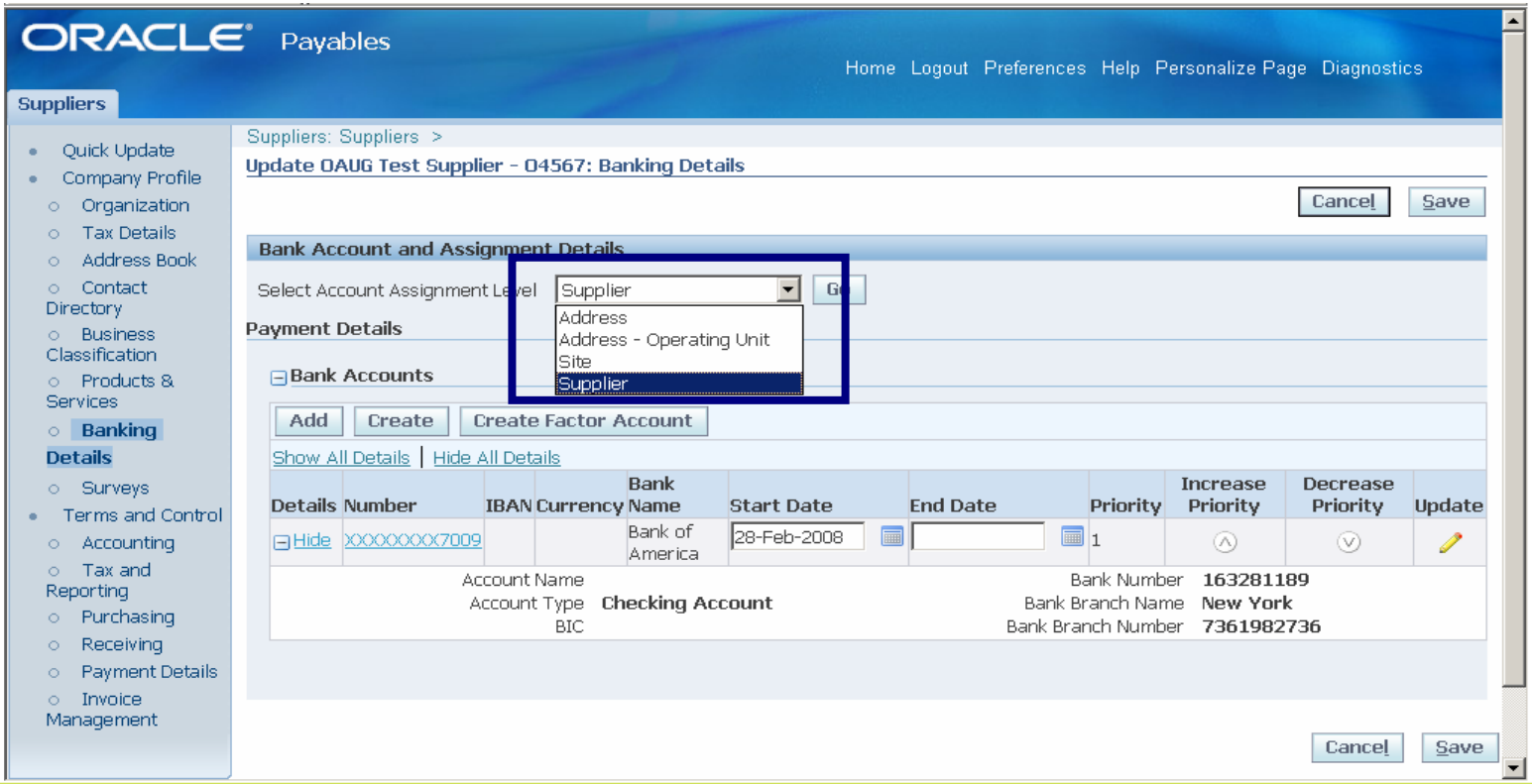
Product & Services Categories

- **Categories/Sub-Categories of Products & Services entered from iSupplier Portal initiate a change request process**
- **Category assignment claimed by the supplier has to be approved by a buyer administrator**



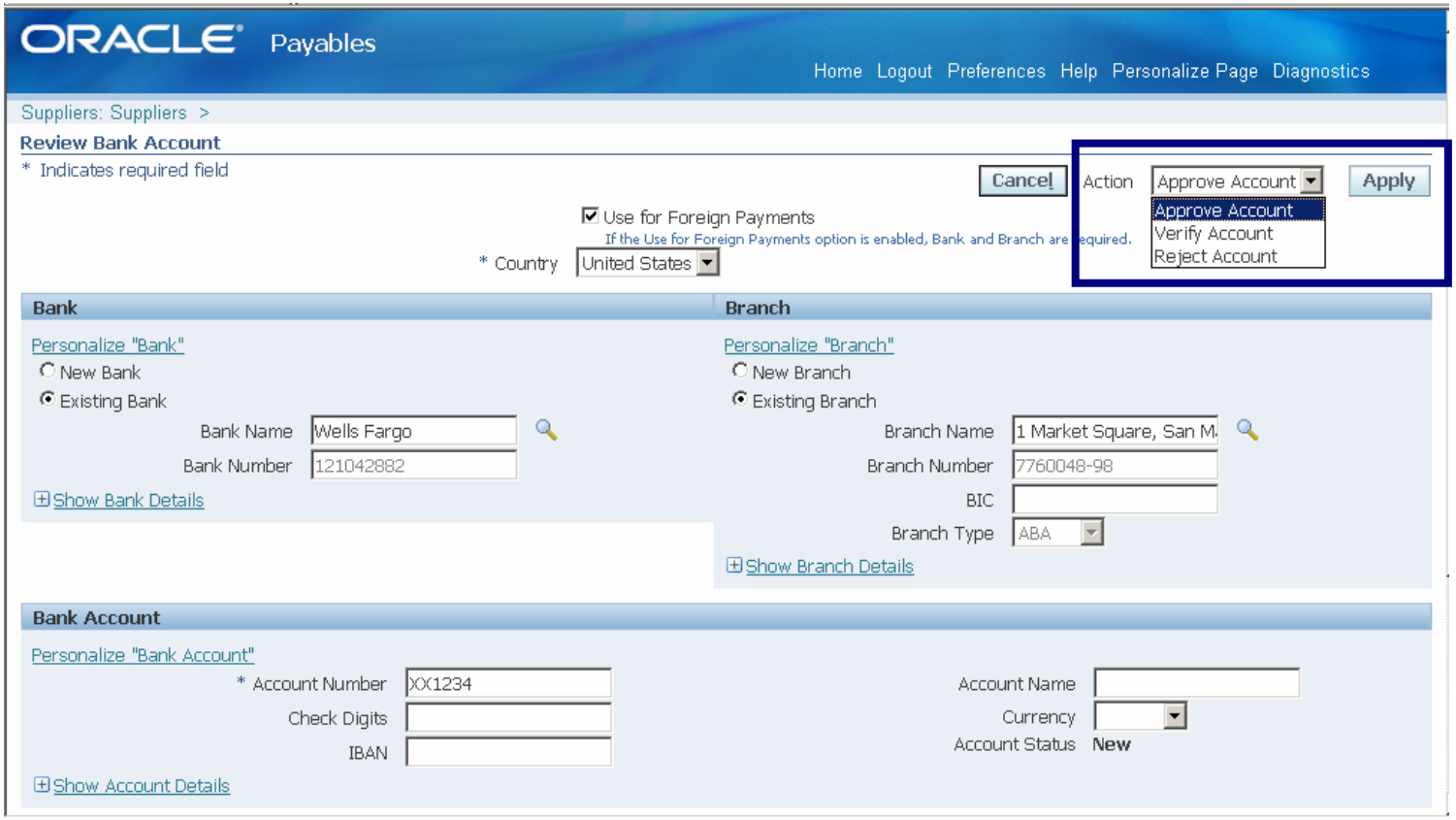
Bank Details

- **Bank Accounts can be assigned at—Address, Address-OU, Site or Supplier Level**
- **Existing Banks/Branches can be used or new Bank/Branches can be created**



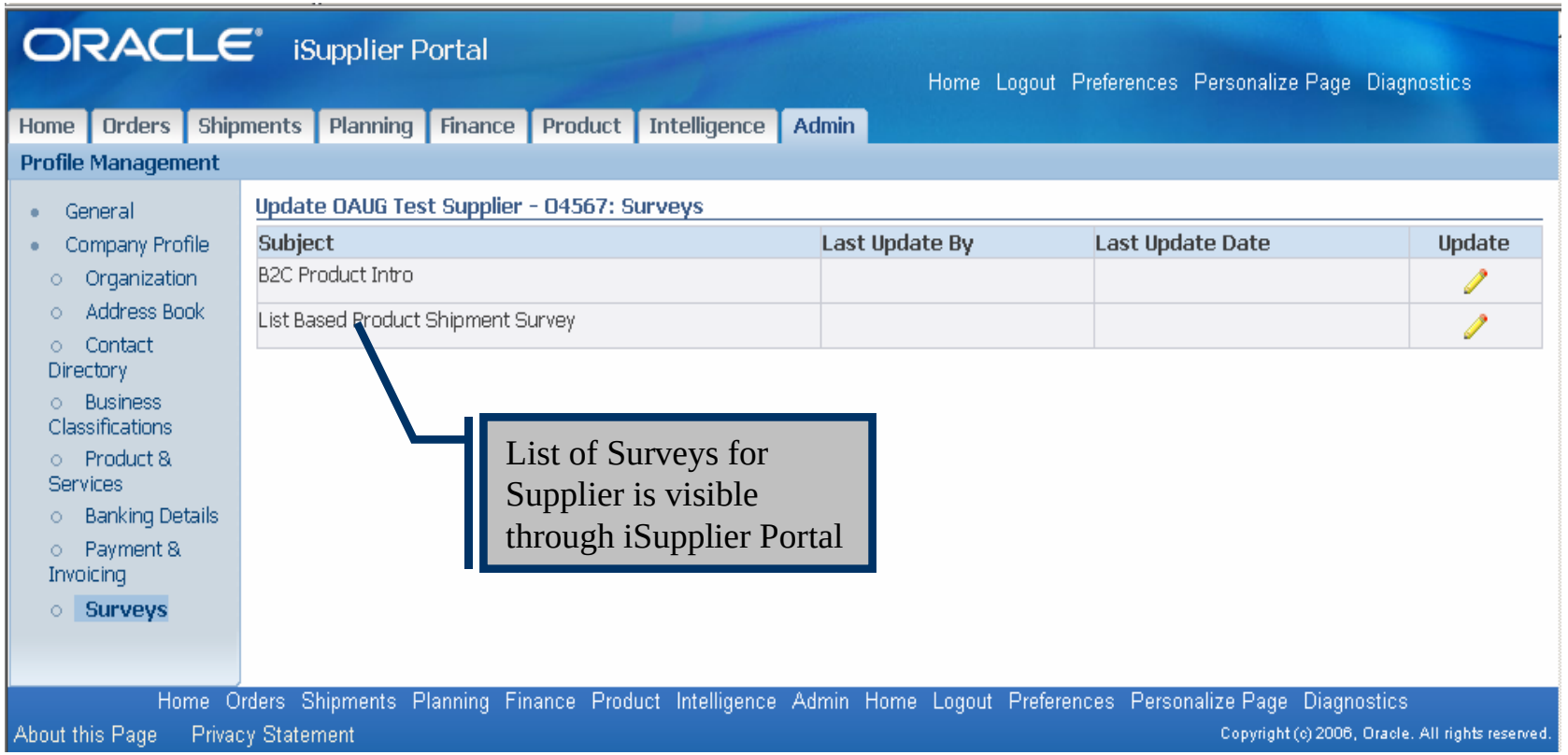
Bank Details

- **Buyer administrator can Approve, Verify or Reject the bank accounts setup from iSupplier Portal**



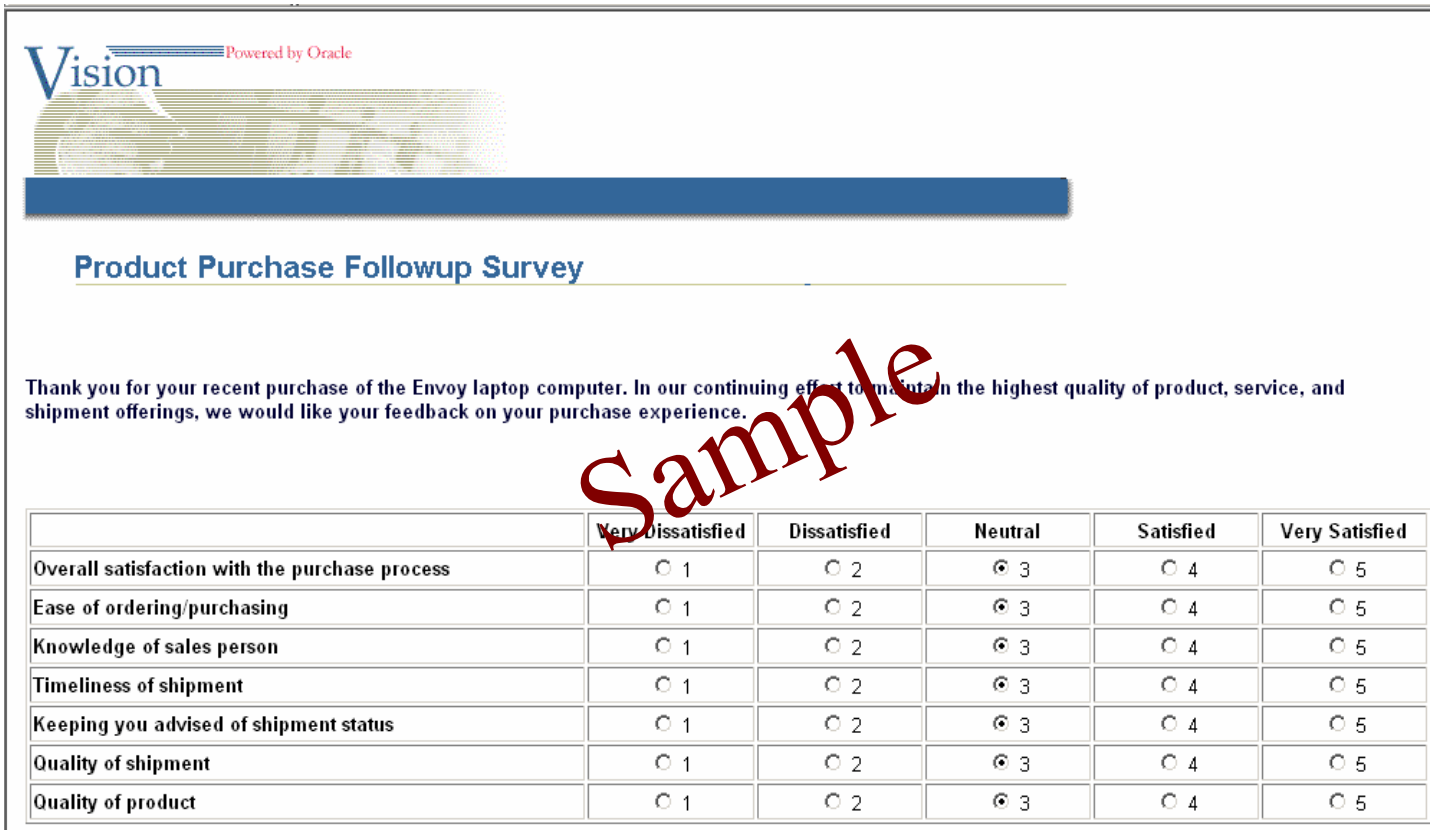
Surveys

- **A new survey feature has been included at a supplier header level**
- **Custom questionnaires can be attached to gather supplier feedback**



Surveys

- **Suppliers can provide responses to attached surveys through iSupplier Portal**



Vision Powered by Oracle

Product Purchase Followup Survey

Thank you for your recent purchase of the Envoy laptop computer. In our continuing effort to maintain the highest quality of product, service, and shipment offerings, we would like your feedback on your purchase experience.

Sample

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Overall satisfaction with the purchase process	○ 1	○ 2	◉ 3	○ 4	○ 5
Ease of ordering/purchasing	○ 1	○ 2	◉ 3	○ 4	○ 5
Knowledge of sales person	○ 1	○ 2	◉ 3	○ 4	○ 5
Timeliness of shipment	○ 1	○ 2	◉ 3	○ 4	○ 5
Keeping you advised of shipment status	○ 1	○ 2	◉ 3	○ 4	○ 5
Quality of shipment	○ 1	○ 2	◉ 3	○ 4	○ 5
Quality of product	○ 1	○ 2	◉ 3	○ 4	○ 5

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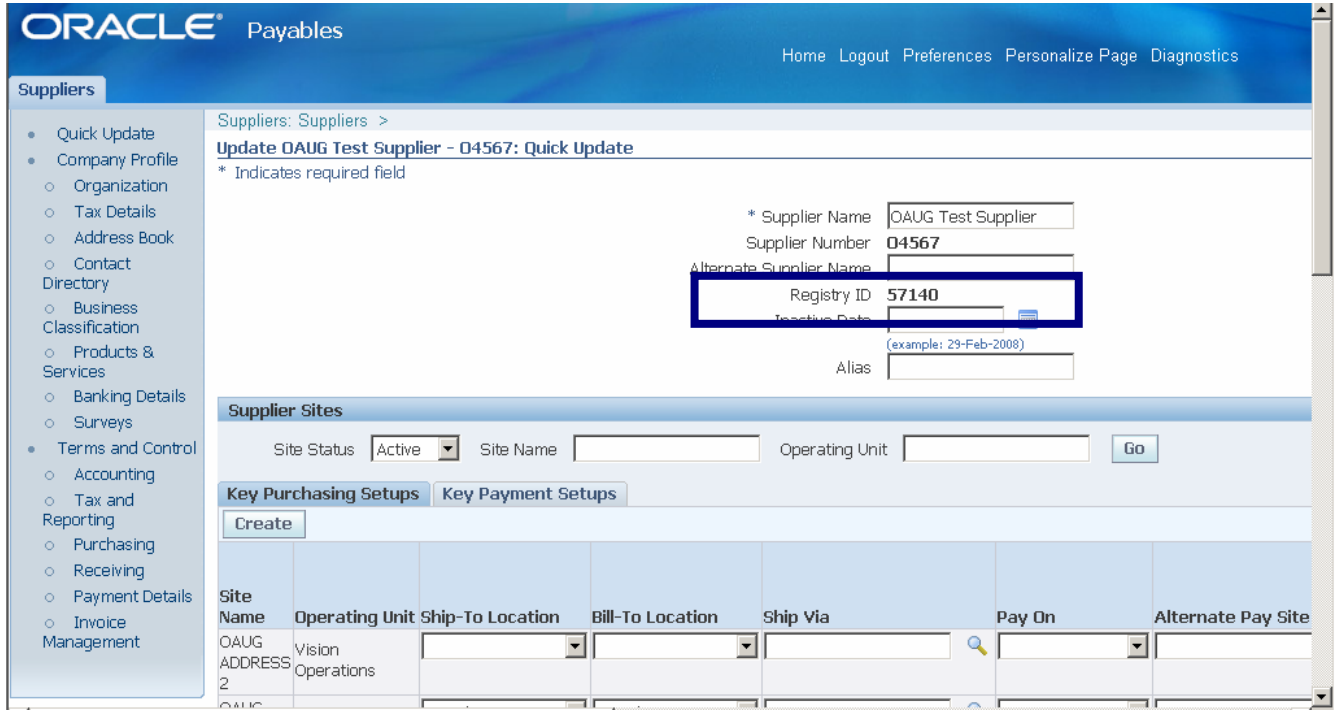
Supplier Entity in TCA

- When a supplier is created in R12, it is represented in the Trading Community Architecture registry and gets a Registry Id
- The registry id can be used to query for the underlying party created for the supplier in other modules of the EBS Suite



Trading Community Architecture (TCA)

- Trading community model is a highly flexible architecture used to capture information about trading partners.
- Key entities in TCA are:
  - Party: Entities of type Person or Organization that can enter into business relationships are called parties.
  - Account: Account represents the attributes of the deploying company's selling relationship with a party.
  - Relationship: Captures the link between two independent parties. The party relationship is also a party by itself
  - Party Sites: Addresses for a party used for a specific purpose like bill-to, ship-to, pay site etc.
  - Contacts: People who have a contact or employment relationship with an organization or person
  - Contact Points: Means of contact like phone email etc.

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Benefits of TCA

- Inclusion of Suppliers in TCA provides access to several enhanced features like:
  - ✓ Third Party Data Integration
  - ✓ Data Quality Management
  - ✓ Relationship Management
  - ✓ Cross Module Visibility of Suppliers

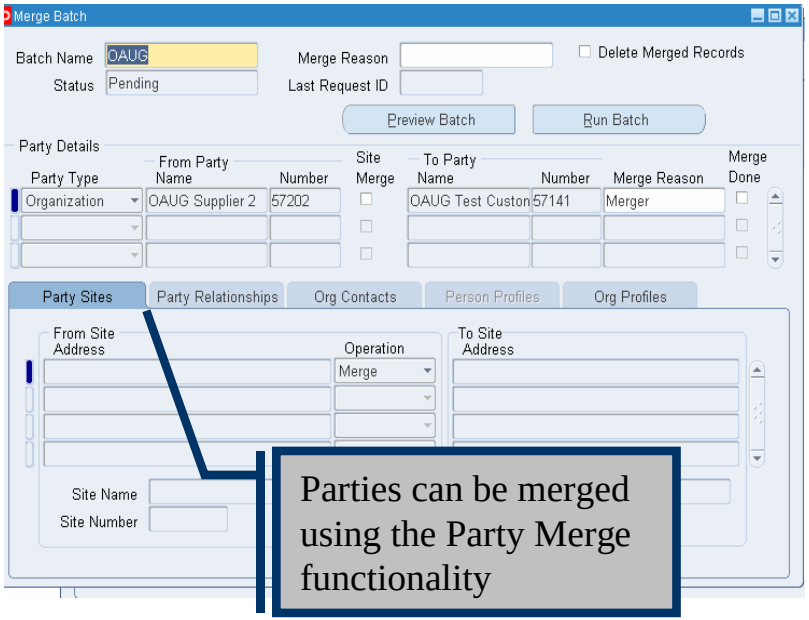
Third Party Data Integration

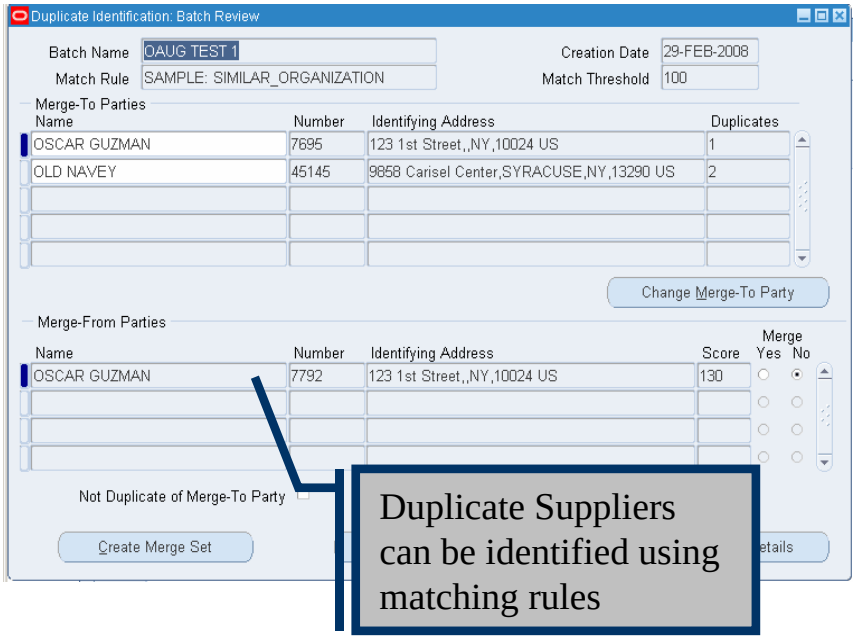
- Supplier entity can access the TCA third party data integration to enrich data in the TCA registry
- Information from third parties like Dun & Bradstreet can be integrated with party records to maintain accurate information
- 3rd Party sources like Dun & Bradstreet provide profile, demographic, credit risk and financial information
- 3rd Party information co-exists with user entered information in the registry

Party associated with Supplier can be accessed in D&B and data can be enriched

Data Quality Management

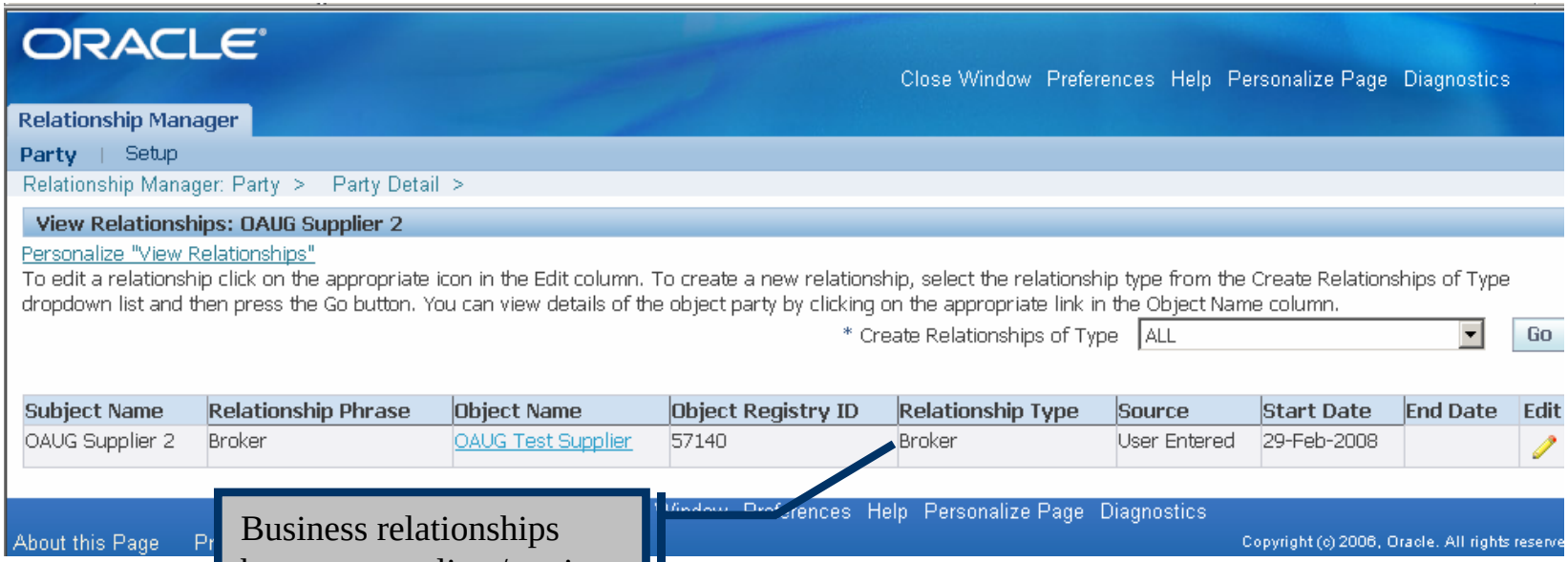
- Oracle TCA Data Quality Management (DQM) is a set of tools and features that provides powerful searching and matching functionality to parties
- Inclusion of suppliers in TCA facilitates usage of DQM for:
  - ✓ Identifying possible duplicates
  - ✓ Party Merge etc.





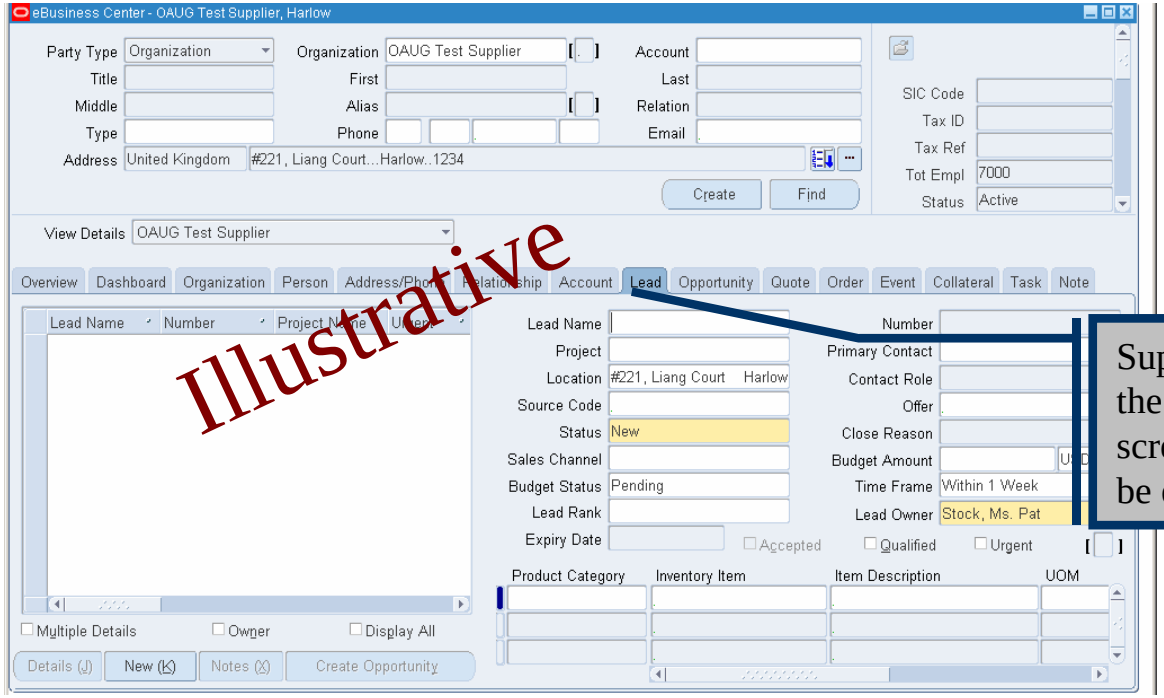
Relationship Management

- Oracle TCA Relationship Manager provides the functionality of creating and managing relationships among existing parties in the TCA Registry
- Relationships of suppliers with other parties can be modeled in relationship manager and this provides a better view of the business role of suppliers



Cross Module Visibility of Suppliers

- Suppliers are visible in multiple applications like Oracle Telesales, CRM resource manager etc. due to inclusion in TCA
- All party related transactions can now be entered for the supplier. For ex: Lead creation, opportunity creation etc.



Supplier entity is visible in the Oracle eBusiness Center screen and transactions can be entered

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Conclusion

- Release 12 brings the following changes in Supplier Creation:
  - "Makeover" of the User Interface
  - Enhanced Profile Management Functionality
  - Tighter integration with modules like e-Tax, iSupplier Portal etc.
  - Inclusion of supplier in TCA registry
- The changes can be called "Rich Content" in a very "Attractive Package"

Thank You