



Training Guide

Oracle E-Business Suite eProcurement Training – iSupplier for
End-Users

Clark County Water Reclamation District (CCWRD)



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iSupplier Training Guide

Introduction

Oracle iSupplier

Oracle iSupplier Portal is being deployed at CCWRD to enable district suppliers to efficiently manage interaction and communication with CCWRD for all purchasing activity. The portal provides a secure, Internet-based access point that enables direct and real-time access to purchasing and invoicing activity with CCWRD.

Suppliers can access the latest information for their individual accounts, including:

- Purchase Orders
- Shipments information
- Receipt information
- Delivery information
- Invoice and Payment status

The two-way collaboration enables suppliers the ability to:

- Update profile data



iSupplier Training Guide

Objectives

During this training course, supplier users will learn how to:

- Access the iSupplier portal and Home Page
- Use the Orders Tab and related functions
- Use the Shipments Tab and related functions
- Use the Finance Tab and related functions
- Perform profile updates through the Admin Tab



Topic 1: iSupplier Portal and Home Page Review

Supplier Access and Account Setup

Approved supplier users will be registered at CCWRD for access to the iSupplier portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated CCWRD administrator(s). The email information will also include the appropriate **link** to the iSupplier login page for access.

This topic covers:

- Navigation to the iSupplier Home Page
- Review of Home Page elements

iSupplier Login

A screenshot of the iSupplier login interface. The background is dark blue. In the top left corner is the Clark County Water Reclamation District logo. The main content is a light blue login form with the following elements: 'User Name' and 'Password' text labels above their respective input fields; 'Log In' and 'Cancel' buttons; a 'Login Assistance' section with a 'Register Here' link; an 'Accessibility' section with a dropdown menu set to 'None'; and a 'Language' section with a dropdown menu set to 'English'. Three white arrows point from the left towards the User Name, Password, and Log In fields. At the bottom left of the form area, there is a small copyright notice: 'Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved.'

The **Login** screen is displayed.

- 1- Enter assigned **UserID** credential in the **User Name** field.
- 2- Enter assigned **Password** credential in the **Password** field.
- 3- Click the **Login** button.



iSupplier Training Guide

Supplier Home | Orders | Shipments | Finance | Administration

Search PO Number

Notifications Full List

Subject	Date
No results found.	

Table Diagnostics

Orders At A Glance Full List

PO Number	Description	Order Date
160635	87289 - Etchants, Rust and Lime Remover, 28 oz Container Size, Jug Container Type, Lemon Fragrance *	25-Aug-2021 13:16:00
160624	87419 - tool box/testing work order *	23-Aug-2021 10:13:55
160592	87336 - All Purpose Cleaner, 144 oz, Bottle, Liquid, Primary Chemical None, PK 3 *	23-Aug-2021 08:16:16
160620	87414 - KH Work Order Testing *	20-Aug-2021 10:32:38
160615	87392 - KH Multiple Attachment Testing II *	19-Aug-2021 09:05:34

NOTE: ALL COMMUNICATION CHANNELS, INQUIRIES AND/OR UPDATES FROM SUPPLIERS TO PROCUREMENT SOLUTIONS SECTION SHALL BE SENT VIA E-MAIL TO THE FOLLOWING ADDRESS: PROCUREMENTSOLUTIONS@CLEANWATERTEAM.COM.
EFFECTIVE FEBRUARY 10, 2020, ALL ELECTRONIC COMMUNICATION FROM THE CLARK COUNTY WATER RECLAMATION DISTRICT RELATED TO PURCHASE ORDERS, SUPPLIER REGISTRATION AND SUPPLIER ACCOUNT MANAGEMENT WILL BE SENT FROM EMAIL ADDRESS: WATERRECOMMUNICATION@CLEANWATERTEAM.COM.
PLEASE USE THE BELOW LINK TO ACCESS THE USER INSTRUCTIONS MANUAL:
[Supplier User Instructions](#)

Orders

- Purchase Orders
- Purchase History

Shipments

- Overdue Receipts

Receipts

- Receipts
- Returns

Invoices

- Invoices

Payments

- Payments

The iSupplier Portal Home Tab Page is displayed.

- Note the **Notifications** section of the screen. Notifications from CCWRD Procurement Solutions will be received in this section.
- Note the **Orders At A Glance** section of the screen. This section will always contain the five most recent purchase orders for immediate review, showing **PO Number, Description, and Order Date**.

Orders At A Glance Full List

PO Number	Description	Order Date
160635	87289 - Etchants, Rust and Lime Remover, 28 oz Container Size, Jug Container Type, Lemon Fragrance *	25-Aug-2021 13:16:00
160624	87419 - tool box/testing work order *	23-Aug-2021 10:13:55
160592	87336 - All Purpose Cleaner, 144 oz, Bottle, Liquid, Primary Chemical None, PK 3 *	23-Aug-2021 08:16:16
160620	87414 - KH Work Order Testing *	20-Aug-2021 10:32:38
160615	87392 - KH Multiple Attachment Testing II *	19-Aug-2021 09:05:34

All purchase orders can be reviewed in **detail** from this section of the screen.

- Click the PO Number **link** for the specific **PO** to review additional information.



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Supplier Home | **Orders** | Shipments | Finance | Administration

Purchase Orders | View Requests | Purchase History

Supplier Home >

Standard Purchase Order: 160620, 0 (Total USD 100.40)

Currency: USD

Actions | View Change History | Go | Export

Order Information

General	Terms and Conditions	Summary
Total 100.40 Supplier GRANAGER INC Supplier Site FO-LAS VEGAS Supplier Contact SUPPORT, CUSTOMER Address 2401 WESTERN AVE LAS VEGAS, NV 89102 Buyer VIAN, VALERIE LAKEY Order Date 20-Aug-2021 10:32:38 Description 87414 - KH Work Order Testing * Status Open Note to Supplier Operating Unit Clark County Water Reclamation District Sourcing Document Supplier Order Number Attachments	Payment Terms NET 30 Carrier BEST METHOD FOB DESTINATION Freight Terms PREPAY AND ADD Shipping Control Ship-To Address Address 6000 E Rochelle Ave Las Vegas, NV 89122 Bill-To Address Address Clark County Water Reclamation 5857 E Flamingo Road Las Vegas, NV 89122	Total 100.40 Received 0.00 Invoiced 0.00 Payment Status Not Paid

PO Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS-DELIVERED		49YK48	15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	EACH	4	4.85	19.40	Open		

The **Order Information** window is displayed.

- 7- Note the **Summary** information for the order.
- 8- Note the additional information shown, including **Buyer** and order **Status**.

PO Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS-DELIVERED		49YK48	15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	EACH	4	4.85	19.40	Open		
2	GOODS-DELIVERED		49YY19	15 Amp Industrial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	EACH	6	8.73	52.38	Open		
3	GOODS-DELIVERED		49YY23	15 Amp Marine Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Yellow/White	EACH	2	14.31	28.62	Open		

The **PO Details** section of the screen shows summary information for each line of the order.

- 9- Click the **Show** link to view additional shipment details for the order line.

PO Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS-DELIVERED		49YK48	15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	EACH	4	4.85	19.40	Open		

Shipment	Ship-To Location	Ordered Qty	Received Qty	Invoiced Qty	Amount Ordered	Amount Received	Amount Invoiced	Promised Date	Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
1	Sup Facilities	4			0.00				22-Aug-2021 00:00:00		Open				

Return to Supplier Home

Actions | View Change History | Go | Export

The **Shipments** detail is shown, including the **Ship-To Location**, **Quantity**, **Amount**, **Promised Date**, **Need-By Date**, **Payment Status** and **Status**.

- 10- Click the **Return to Home** link to return to the main page.



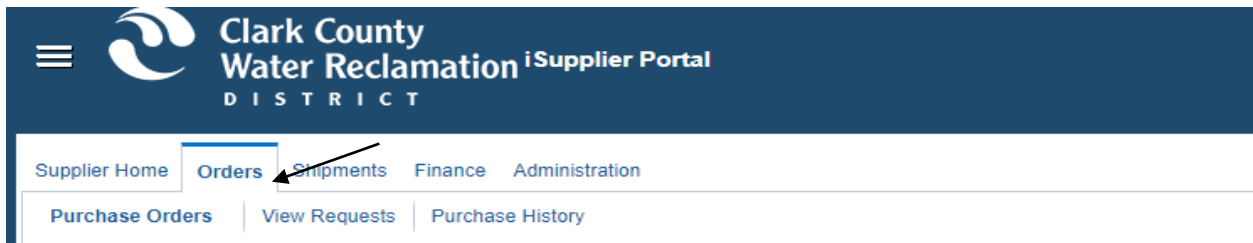
Topic 2: iSupplier Home Page – Orders Tab

iSupplier portal users will have direct access to summary and detail information related to orders through the **Orders** Tab. This Tab provides links to additional information pertaining to orders, including **PO Changes**.

This topic covers:

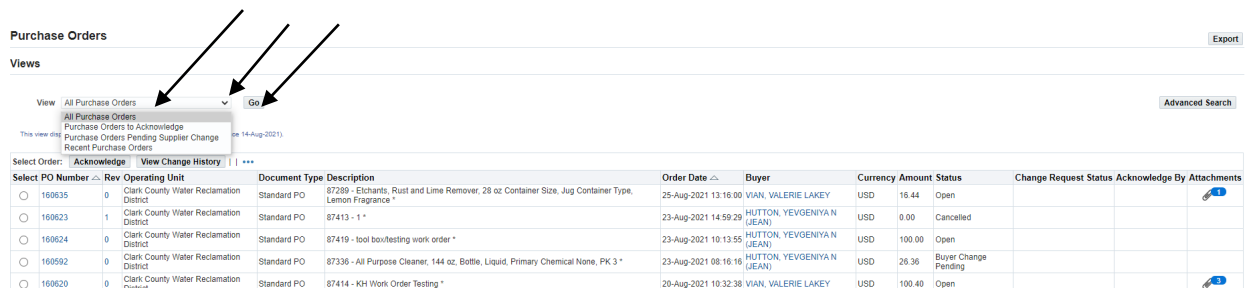
- Overview of the Orders Tab and summary information
- Review of views related to Purchase Orders

Orders Tab – Summary Information

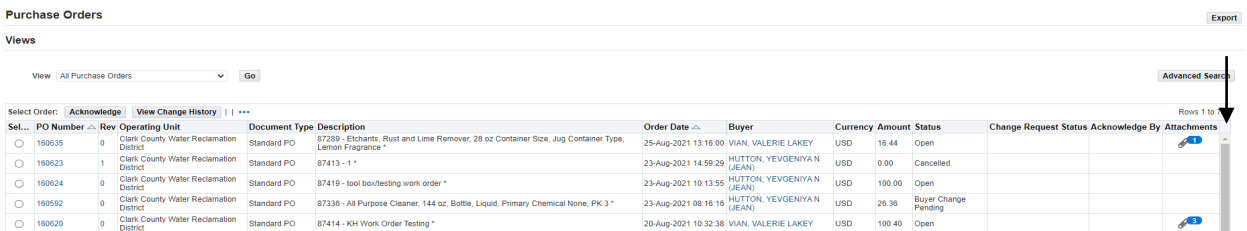


The Home Page is displayed.

1- Click on the **Orders** Tab.



The **Purchase Orders** window is displayed. To review all purchase orders, select **All Purchase Orders** from the drop-down menu and click **Go** button.





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The **links** for each **PO Number** can be viewed within **PO Number** column. Use the scroll down bar to view additional POs.

Purchase Orders Export

Views

View: All Purchase Orders Go Advanced Search

Select Order	Acknowledge	View Change History	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge By	Attachments
<input type="radio"/>			160635	0	Clark County Water Reclamation District	Standard PO	87269 - Elchants, Rust and Lime Remover, 28 oz Container Size, Jug Container Type, Lemon Fragrance *	25-Aug-2021 13:16:00	VIAN, VALERIE LAKEY	USD	16.44	Open			
<input type="radio"/>			160623	1	Clark County Water Reclamation District	Standard PO	87413 - 1 *	23-Aug-2021 14:59:29	HUTTON, YEVGENIYAN (JEAN)	USD	0.00	Cancelled			
<input type="radio"/>			160624	0	Clark County Water Reclamation District	Standard PO	87419 - tool bourestesting work order *	23-Aug-2021 10:13:55	HUTTON, YEVGENIYAN (JEAN)	USD	100.00	Open			
<input type="radio"/>			160592	0	Clark County Water Reclamation District	Standard PO	87335 - All Purpose Cleaner, 144 oz, Bottle, Liquid, Primary Chemical None, PK 3 *	23-Aug-2021 08:16:16	HUTTON, YEVGENIYAN (JEAN)	USD	26.36	Buyer Change Pending			
<input type="radio"/>			160620	0	Clark County Water Reclamation District	Standard PO	87414 - KH Work Order Testing *	20-Aug-2021 10:32:38	VIAN, VALERIE LAKEY	USD	100.40	Open			

The order information is listed in sequence by the latest **Order Date**.

- 1- Click the **Order Date** column header/indicator next to **Order Date** to reverse the sequence.

Purchase Orders Export

Views

View: All Purchase Orders Go Advanced Search

Select Order	Acknowledge	View Change History	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge By	Attachments
<input type="radio"/>			50146	0	Clark County Water Reclamation District	Standard PO	TOOLS FOR JOHN EDENBRUM & WET VAC FOR JOE B	13-Aug-1999 15:59:16	MURPHY, SHEILA HEHNER	USD	583.44	Finally Closed			
<input type="radio"/>			50177	0	Clark County Water Reclamation District	Standard PO	BAR STOCK	16-Aug-1999 12:13:13	MURPHY, SHEILA HEHNER	USD	7.68	Finally Closed			
<input type="radio"/>			50202	0	Clark County Water Reclamation District	Standard PO	TORQUE WRENCH	20-Aug-1999 08:27:59	MURPHY, SHEILA HEHNER	USD	592.65	Finally Closed			
<input type="radio"/>			50245	0	Clark County Water Reclamation District	Standard PO		26-Aug-1999 12:50:00	KARAFKA, ALISON GAIL	USD	622.76	Finally Closed			
<input type="radio"/>			50002	0	Clark County Water Reclamation District	Global Contract Agreement	INDUSTRIAL SUPPLIES, MISC.	01-Sep-1999 07:59:19	KARAFKA, ALISON GAIL	USD	105,000.00	Finally Closed			
<input type="radio"/>			50294	0	Clark County Water Reclamation District	Standard PO	WHSE SUPPLIES	02-Sep-1999 09:56:36	MURPHY, SHEILA HEHNER	USD	329.60	Finally Closed			
<input type="radio"/>			50376	0	Clark County Water Reclamation District	Standard PO	TOOL BOX, LOCK FOR TRAINING ROOM TOOLS	16-Sep-1999 13:51:26	MURPHY, SHEILA HEHNER	USD	351.62	Finally Closed			
<input type="radio"/>			50386	0	Clark County Water Reclamation District	Standard PO	WAREHOUSE SUPPLIES	16-Sep-1999 16:34:00	MURPHY, SHEILA HEHNER	USD	643.72	Finally Closed			

The order information is now listed in sequence by the earliest **Order Date**.

- 2- Click the **Order Date** column header/indicator next to **Order Date** again to return to the original sequence.

Utilizing Purchase Order View

Purchase Orders Export

Views

View: All Purchase Orders Go Advanced Search

Use the **Views** function to narrow the order search.

- 1- Click the **Advanced Search** button.

Purchase Orders

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Match All Any

PO Number	is	<input type="text" value="160620"/>
Document Type	is	<input type="text"/>
Order Date	is	<input type="text" value="(13-Sep-2021)"/>
Buyer	is	<input type="text"/>



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The **Advanced Search** window is displayed. Note the multiple **parameters** available for search.

- 2- Enter a specific value in the **PO Number** field.
- 3- Click the **Go** button to execute the search.

Purchase Orders Export

Advanced Search Views

Specify parameters and values to filter the data that is displayed in your results set.

Match All Any

PO Number IS

Document Type IS

Order Date IS

Buyer IS

Select: | | ...

Select PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge By	Attachments
<input type="radio"/> 160620	0	Clark County Water Reclamation District	Standard PO	87414 - KH Work Order Testing *	20-Aug-2021 10:32:38	VIAN, VALERIE LAKEY	USD	100.40	Open			

Search results are displayed.

- 4- Click the **PO Number** link to view additional information for the order.

Orders: Purchase Orders >
Standard Purchase Order: 160620, 0 (Total USD 100.40)
Currency= USD

Order Information Actions View Change History Go Export

General

Total 100.40
Supplier GRAINGER INC
Supplier Site POLAS VEGAS
Supplier Contact SUPPORT, CUSTOMER
Address 2401 WESTERN AVE
LAS VEGAS, NV 89102
Buyer VIAN, VALERIE LAKEY
Order Date 20-Aug-2021 10:32:38
Description 87414 - KH Work Order Testing *
Status Open
Note to Supplier
Operating Unit Clark County Water Reclamation District
Sourcing Document
Supplier Order Number
Attachments

Terms and Conditions

Payment Terms NET 30
Carrier BEST METHOD
FOB DESTINATION
Freight Terms PREPAY AND ADD
Shipping Control
Ship-To Address
Address 6000 E Rochelle Ave
Las Vegas, NV 89122
Bill-To Address
Address Clark County Water Reclamation
5857 E Flamingo Road
Las Vegas, NV 89122

Summary

Total 100.40
Received 0.00
Invoiced 0.00
Payment Status Not Paid

PO Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS-DELIVERED		49YK48	15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	EACH	4	4.85	19.40	Open		

The **Order Information** window is displayed. Note the **Actions** box with multiple options for viewing additional information related to the order.

- 5- Review **Summary** box for PO total and payment status
- 6- Select the **View Change History** value from the down-box.
- 7- Click the **Go** button.

Orders: Purchase Orders > View Order Details >
Change History for Order OK

Currency=USD

Indicates new values
 Indicates cancellation

Details Request Date Line Shipment Item Supplier Item Description Qty UOM Price / Rate Amount Promised Date Need By Date Start Date End Date Supplier Order Number Supplier Order Line Number Additional Changes Split Cancellation Request Response

No results found.

All **Change Order** history is displayed for the order.

- 8- Click the **Ok** button to close the window.



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Purchase Orders | View Requests | Purchase History

Standard Purchase Order: 160620, 0 (Total USD 100.40)

Currency= USD

Order Information

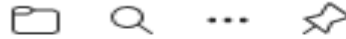
General	Terms and Conditions	Summary
Total 100.40 Supplier GRAINGER INC Supplier Site PO-LAS VEGAS Supplier Contact SUPPORT, CUSTOMER Address 2401 WESTERN AVE	Payment Terms NET 30 Carrier BEST METHOD FOB DESTINATION Freight Terms PREPAY AND ADD Shipping Control	Total 100.40 Received 0.00 Invoiced 0.00 Payment Status Not Paid


Actions: View Change History, Printable View, View Receipts, View Invoices, View Payments, View Shipments, Go, Export

Returning to the **Actions** box:

- 9- Select the **Printable View** value.
- 10- Click the **Go** button.

Downloads



 PO_0_160620_0_US (1).pdf
[Open file](#)

The **File Download** window is displayed.

- 11- Click the **Open** button.



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CLARK COUNTY WATER RECLAMATION DISTRICT
 5857 EAST FLAMINGO ROAD
 LAS VEGAS, NEVADA 89122
 PHONE: (702) 668-8090
 FAX: (702) 668-9090

Vendor:	GRAINGER INC 2401 WESTERN AVE LAS VEGAS, NV 89102 UNITED STATES
Contact:	CUSTOMER SUPPORT
Fax:	(702) 387-0278

Please confirm the receipt of this PO by means of sending the reply email via the following link: poreceipt@cleanwaterteam.com.

PURCHASE ORDER	
PURCHASE ORDER NO.	160620
REVISION NO.	0
	Page 1 of 2
Req. No.	87414
THIS PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, PACKING LISTS, CARTONS AND CORRESPONDENCE RELATED TO THIS ORDER.	

Ship To: Sup Facilities
 6000 E Rochelle Ave
 Las Vegas, NV 89122
 United States

Bill To: Admin - Acct
 Clark County Water Reclamation
 5857 E Flamingo Road
 Las Vegas, NV 89122
 United States

accountspayable@cleanwaterteam.com

Header Level Short Text Detail			
Vendor No. 10012	Date Approved 20-AUG-2021	Buyer VIAN, VALERIE	Requestor / Deliver to FIFE, DANIELLE
Payment Terms NET 30	F.O.B. DESTINATION	Freight Terms PREPAY AND ADD	Ship Via BEST METHOD
Vendor Note: Line 1 - Note to Supplier			

LINE ITEM	ITEM NO.	ITEM DESCRIPTION	DELIVERY/ START DATE	QTY/ PRICE FOR SRVC	UNIT	U/PRICE	EXTENSION	CURR
1		15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black Supplier Item: 49YK48 Config ID: WWG49YK48	22-AUG-2021	4	EACH	4.85	19.40	USD

A PDF copy of the order is displayed. Use this copy for printing or save to desktop.

- Use the **File>Exit** command within the toolbar tab located in the top left corner of the screen to exit from the PDF document.



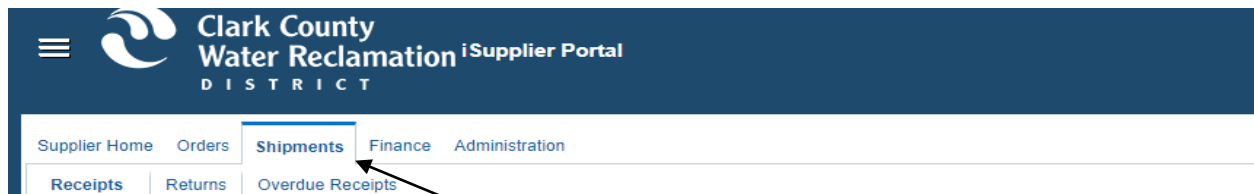
Topic 3: iSupplier Home Page – Shipments Tab

iSupplier portal users will have direct access to multiple levels of shipment information through the **Shipments** Tab. This Tab provides links to additional information pertaining to shipments, including **Receipts, Returns, and Performance**.

This topic covers:

- Overview of the Shipments tab and summary information
- Review of Shipment Receipts details
- Review of Shipment Returns details
- Review of Overdue Receipts details

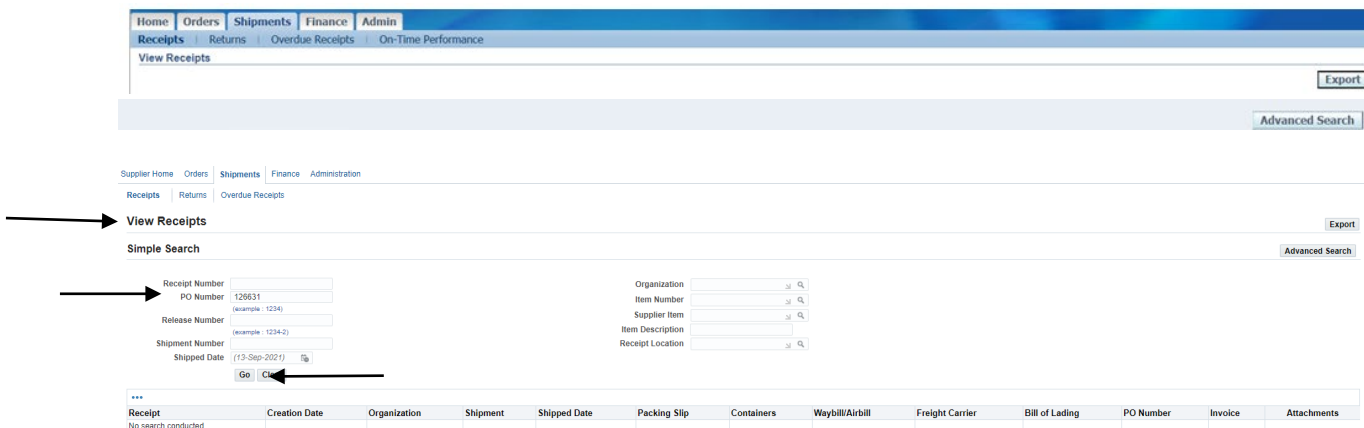
Shipments Tab – Summary Information



The **Home Page** is displayed.

- 1- Click on the **Shipments** Tab.

Shipment Receipt Details



The **View Receipts** window is displayed. Multiple search criteria are available for query.



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- 1- Enter the **PO Number** value (if known). Or if not known, click the **Go** button to view all records.
- 2- Click the **Go** button.

View Receipts Export

Simple Search Advanced Search

Receipt Number:
PO Number:
Release Number:
Shipment Number:
Shipped Date:

Organization:
Item Number:
Supplier Item:
Item Description:
Receipt Location:

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice	Attachments
59299	09-Jan-2015 11:37:03	CCSD								126631		
59298	09-Jan-2015 11:37:03	CCSD								126631		
59287	09-Jan-2015 11:37:03	CCSD								126631		
59296	09-Jan-2015 11:37:03	CCSD			6280467278					126631		

Search results are displayed.

- 3- Subsequent to identifying the specific PO that needs to be reviewed, click the **Receipt** link to view detail information.

Shipments: Receipts >
Receipt: 59299 Export

Creation Date: 09-Jan-2015 11:37:03
Organization: CCSD
Supplier: GRAINGER INC
Supplier Site: PO-LAS VEGAS
Shipment Number:
Shipment Date:
Packing Slip:
Containers:
Waybill/Airbill:
Freight Carrier:
Bill of Lading:
Attachments: None

Receipt Transactions

Receipt Date	Promised Date	Need-By Date	Performance	PO Number	Line	Shipment	Item/Job	Description	UOM	Ordered	Return	Net Received	Accepted Defects	Location	Attachme...	LPN/Lot	Serial	Invoice
09-Jan-2015 11:32:27	19-Jan-2015 13:22:00		Early	126631	4	1	11684	DISPOSABLES NO MODIFIER, ANSELL 3NFJ5, DISPOSABLE GLOVES, POWDER FREE, 12", BLUE, XL, NITRILE	CASE	10.0		1	0.0	Sup Facilities				

Return to Shipments: Receipts

Detail information for the receipt is displayed. Note the inclusion of **Performance** and **Net Received** information for the receipt.

- 4- Click the **Return to Shipments: Receipts** link.

Shipment Returns Detail

Clark County Water Reclamation DISTRICT iSupplier Portal

Supplier Home Orders **Shipments** Finance Administration

Receipts **Returns** Overdue Receipts

- 1- Click the **Returns** link under the **Shipments** Tab.

Returns Summary Export

Simple Search Advanced Search

Note that the search is case insensitive

Organization:
PO Number:
Receipt Number:
Shipment Number:

RMA Number:
Item:
Supplier Item:
Item Description:

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



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The **Returns Summary** window is displayed. Multiple search criteria are available for query.

2- To view **all** returns information, click the **Go** button.

Returns Summary Export

Simple Search Advanced Search

Note that the search is case insensitive

Organization RMA Number
 PO Number Item
 Receipt Number Supplier Item
 Shipment Number Item Description

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM	Quantity Received	Quantity Returned	Return Date	Reason	Supplier Config ID
Clark County Water Reclamation District	124387	157390			27-Oct-2020 07:25:22			ITEM 240677: BATTERY NICKEL CADMIUM 4.8 0 6A/HR MFG BRAND NAME: HUBBELL LIGHTING-DUAL-LITE MANUFACTURER PART NO: 0120894	EACH	2	2	27-Oct-2020 15:29:48		
Clark County Water Reclamation District	124386	157390			27-Oct-2020 07:25:21			2PFX8 Battery Nickel Cadmium 2.4V/0.0012A/HR Mfg Brand Name: LITHONIA LIGHTING Manufacturer Part No: ELB 2P41P2N	EACH	2	2	27-Oct-2020 15:29:48		
Clark County Water Reclamation District	124329	157419			22-Oct-2020 13:41:11	9626		EXPENDABLES NO MODIFIER, 48UR52, CRINKLED NATURAL RUBBER LATEX COATED GLOVES, BLUE/GRAY, SMALL, 10 GAUGE	EACH	4	4	27-Oct-2020 14:32:47		
Clark County Water Reclamation District	124318	157391			22-Oct-2020 12:28:13			6FFJ1, 115v recirculating pump, ESSICK AIR PRODUCTS 110467	EACH	4	4	27-Oct-2020 16:40:26		
Clark County Water Reclamation District	124317	157400			22-Oct-2020 12:24:44			6TUC5 air deflector, CLEAR, magnetic	EACH	10	10	27-Oct-2020 16:38:41		
Clark County Water Reclamation District	120835	155641			12-Jun-2020 10:35:00			2VDH9 - Battery Charger, NiCd, NiMH, Li-Ion, Dewalt	EACH	1	1	12-May-2021 11:56:10		
Clark County Water Reclamation District	120837	155641			12-Jun-2020 10:35:00			55KE70 - Battery, Li-Ion, 4.0Ah, 20.0V, DEWALT	EACH	1	1	12-May-2021 11:56:10		
Clark County Water Reclamation District	120833	155641			12-Jun-2020 10:35:00			11A157 - Battery Charger, 12.0 to 20.0V, Li-Ion, Dewalt	EACH	1	1	12-May-2021 11:56:10		
Clark County Water Reclamation District	120720	155415			09-Jun-2020 11:16:02			23V335 - Transport Drum closed Head, 35 gal, White	EACH	3	3	11-May-2021 08:34:10		
Clark County Water Reclamation District	109544	150014			20-May-2019 13:01:55			Chest Cooler, Hard Sided, 75 qt.	EACH	4	4	04-Jun-2019 15:05:16		

In the search results, detail information for the return is displayed.

3- Note the inclusion of **RMA Number**, **Quantity Returned**, **Return Date**, and **Reason** information for each return.

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM	Quantity Received	Quantity Returned	Return Date	Reason	Supplier Config ID
Clark County Water Reclamation District	124387	157390			27-Oct-2020 07:25:22			ITEM 240677: BATTERY NICKEL CADMIUM 4.8 0 6A/HR MFG BRAND NAME: HUBBELL LIGHTING-DUAL-LITE MANUFACTURER PART NO: 0120894	EACH	2	2	27-Oct-2020 15:29:48		
Clark County Water Reclamation District	124386	157390			27-Oct-2020 07:25:21			2PFX8 Battery Nickel Cadmium 2.4V/0.0012A/HR Mfg Brand Name: LITHONIA LIGHTING Manufacturer Part No: ELB 2P41P2N	EACH	2	2	27-Oct-2020 15:29:48		
Clark County Water Reclamation District	124329	157419			22-Oct-2020 13:41:11	9626		EXPENDABLES NO MODIFIER, 48UR52, CRINKLED NATURAL RUBBER LATEX COATED GLOVES, BLUE/GRAY, SMALL, 10 GAUGE	EACH	4	4	27-Oct-2020 14:32:47		

4- Within the **Receipt Number** column, click the **link** for specific **Receipt Number** to view detail information.

Shipments: Returns >

Receipt Transactions Export

Receipt	PO Number	Line	Shipment	Description	UOM	Ordered	Return	Net Received	Accepted Defects	Locati...	Receipt Date	Promised Date	Need By Date	Perform...
124387	157390	2	1	ITEM 240677: BATTERY NICKEL CADMIUM 4.8 0 6A/HR MFG BRAND NAME: HUBBELL LIGHTING-DUAL-LITE MANUFACTURER PART NO: 0120894	EACH	2.0	2.0	2	0.0	LWRP	27-Oct-2020 07:25:22		19-Oct-2020 00:00:00	Late

Return to Shipments: Returns

Detail information for the return is displayed.

5- Click the **Return to Shipments: Returns** link.

Overdue Receipts Detail

Clark County Water Reclamation **iSupplier Portal**
DISTRICT

Supplier Home Orders **Shipments** Finance Administration

Receipts Returns **Overdue Receipts**



iSupplier Training Guide

1- Click the **Overdue Receipts** link under the **Shipments** Tab.

Supplier Home | Orders | **Shipments** | Finance | Administration

Receipts | Returns | **Overdue Receipts**

Overdue Receipts Export

Simple Search

Note that the search is case insensitive Advanced Search

Organization

PO Number

Item

Supplier Item

Due Date (13-Sep-2021)

Go

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buyer	Supplier Config ID
No search conducted.												

The **Overdue Receipts** window is displayed. Multiple search criteria are available for query.

2- To view **all** overdue receipts, click the **Go** button.

Overdue Receipts Export

Simple Search

Note that the search is case insensitive Advanced Search

Organization

PO Number

Item

Supplier Item

Due Date (13-Sep-2021)

Go

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buyer	Supplier Config ID
Clark County Water Reclamation District	160635		499L40	Furniture Polish, 32 oz. Spray Bottle, Lemon	26-Aug-2021 00:00:00	EACH	1	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG499L40
Clark County Water Reclamation District	160624			tool bou/testing work order	25-Aug-2021 00:00:00	EACH	10	0	Sup Facilities	BEST METHOD	HUTTON, YEVGENIYA N (JEAN)	
Clark County Water Reclamation District	160620		49YY19	15 Amp Industrial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	22-Aug-2021 00:00:00	EACH	6	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG49YY19
Clark County Water Reclamation District	160620		49YK48	15 Amp Commercial Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Black	22-Aug-2021 00:00:00	EACH	4	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG49YK48
Clark County Water Reclamation District	160620		49YY23	15 Amp Marine Grade Standard Straight Blade Connector, 5-15R NEMA Configuration, Yellow/White	22-Aug-2021 00:00:00	EACH	2	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG49YY23
Clark County Water Reclamation District	160614		2A456	Electrical Tape, Tape Length 66 ft, Tape Color White	21-Aug-2021 00:00:00	EACH	3	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG2A456
Clark County Water Reclamation District	160610		12666	Air Hose, Hose Tube Material Nitrile, Hose Cover Material Nitrile	21-Aug-2021 00:00:00	EACH	3	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG12666
Clark County Water Reclamation District	160611		5ELP0	11 13/16 inL, Large Locking Reusable Tie Hook with 44 lb Load Capacity, Hi-Visibility Orange	21-Aug-2021 00:00:00	EACH	1	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG5ELP0
Clark County Water Reclamation District	160614		2A230	Electrical Tape, Tape Backing Material Vinyl, Tape Length 66 ft, Tape Color Blue	21-Aug-2021 00:00:00	EACH	4	0	Sup Facilities	BEST METHOD	VIAN, VALERIE LAKEY	WWG2A230

Search results are listed by **PO Number**, with latest **Due Date** listed first.

3- Click the indicator next to **Due Date** to change the sequence.

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buyer	Supplier Config ID
Clark County Water Reclamation District	71553			SPOTLIGHT, PORTABLE #3WA20, PACKING SLIP NO. 1115105535 - DEL. NO. 6146877300	31-Dec-2004 00:00:00	EACH	36	0	Sup Facilities	BEST METHOD	MURPHY, SHEILA HEHNER	
Clark County Water Reclamation District	73498			INV. 934-902699-1 LADDER, FG, TWIN, 14FT	29-April-2005 00:00:00	EACH	459.45	0	Sup Facilities	BEST METHOD	MURPHY, SHEILA HEHNER	
Clark County Water Reclamation District	95013			3 year warranty on fluorescent light fixtures	05-Aug-2008 00:00:00	EACH	16.95	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	94177			TERMINAL BLOCKS (50/box @ .81 cents)	11-Sep-2008 16:07:00	BOX	2	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	94177			CIRCUIT BREAKER	11-Sep-2008 16:07:00	EACH	2	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	94614			2 YEAR TRIPLEGUARD WARRANTY	30-Sep-2008 14:46:00	EACH	75.95	0	Sup Facilities	BEST METHOD	BICHSEL, DARLENE BEVERLY	
Clark County Water Reclamation District	98111			BLADE, DIAMOND, 4 1/2 IN.	31-Mar-2009 00:00:00	EACH	1	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			ABRASIVE CUT OFF WHEEL	31-Mar-2009 00:00:00	EACH	25	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			HOSE, WATER, 600 PSI, 918	31-Mar-2009 00:00:00	EACH	2	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			MEASURING TAPE, 25 FT X 1	31-Mar-2009 00:00:00	EACH	2	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			QUICK LINK, 1/4 IN	31-Mar-2009 00:00:00	EACH	5	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			SHOVEL, DRAIN SPADE	31-Mar-2009 00:00:00	EACH	1	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	
Clark County Water Reclamation District	98111			STORAGE/CARGO BOX, 24 GAL	31-Mar-2009 00:00:00	EACH	1	0	Sup Facilities	BEST METHOD	KARAFI, ALISON GAIL	

The listing now displays earliest **Due Date** listed first.

4- Click the indicator next to **Due Date** to return to the original sequence.

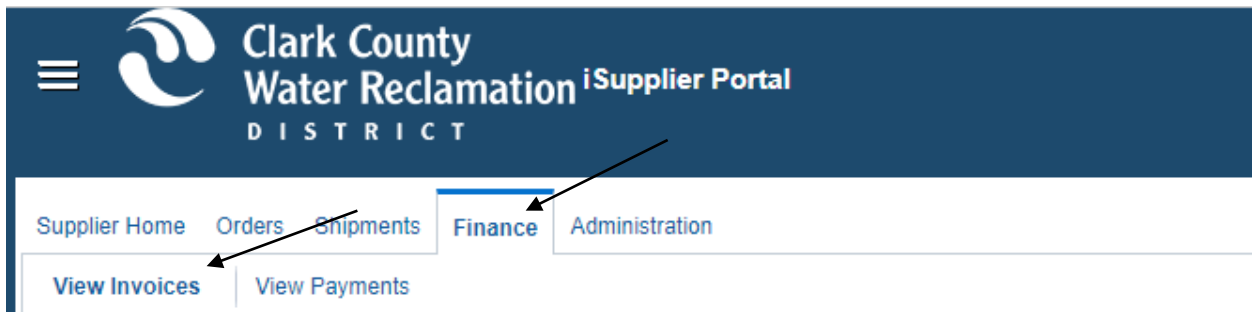


Topic 4: iSupplier Home Page – Finance Tab

iSupplier portal users will have direct access to multiple levels of financial information through the **Finance** Tab. This Tab provides links to invoice and payment information.

This topic covers:

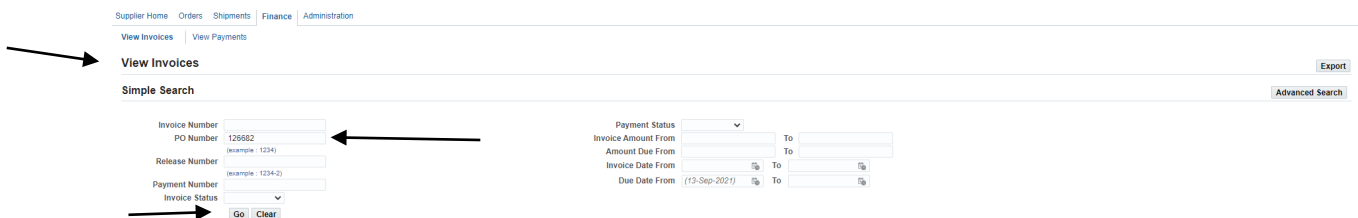
- Overview of the Finance Tab and summary information
- Review of Invoice details
- Review of Payments details



The **Home Page** is displayed.

- 1- Click on the **Finance** Tab.

Invoice Information



The **View Invoices** window is displayed. Note the multiple criteria available for query.

- 2- Enter the value in the **PO Number** field (if known). Or if not known, click the **Go** button to view all records.
- 3- Click the **Go** button.



iSupplier Training Guide

View Invoices

Simple Search

Invoice Number: PO Number: 129582
 Release Number: (example: 1234)
 Payment Number: (example: 1234-2)
 Invoice Status:

Payment Status:
 Invoice Amount From: To:
 Amount Due From:
 Invoice Date From: To:
 Due Date From: (12-Sep-2021) To:

Invoice #	Invoice Date	Type	Currency	Amount	Due Status	On Hold	PO Number	Receipt	Payment Status	Payment	Scheduled Payments	Attachments
9646631557	22-Jan-2015	Standard	USD	51.36	0.00 Approved		126682		Paid	92209	[+]	
9642953211	19-Jan-2015	Standard	USD	66.08	0.00 Approved		126682		Paid	92113	[+]	
9637951938	12-Jan-2015	Standard	USD	384.76	0.00 Approved		126682		Paid	92015	[+]	

Search results are displayed in summary for all invoices related to the PO; select the applicable invoice that needs to be reviewed.

4- Click the **Invoice** link to view details.

Standard Invoice: 9646631557 (Total USD 51.36)

Currency: USD

General

Invoice Date: 22-Jan-2015
 Status: Approved
 On Hold:
 Batch: AP013015
 Attachments: None
 Supplier: GRAINGER INC
 Supplier Site: REMIT ADDR
 Address: P O BOX 419267
 DEPT 423-804980878
 KANSAS CITY, MO 64141-6267

Amount Summary

Item: 51.36
 Freight: 0.00
 Miscellaneous: 0.00
 Tax: 0.00
 Prepayment: 0.00
 Retainage: 0.00
 Withholding Tax: 0.00
 Total: 51.36

Payment Information

Paid: 51.36
 Discount Taken: 0.00
 Due: 0.00
 Status: Paid
 Payment Date: 06-FEB-2015
 Payment: 92209
 Term: NET 30

[Invoice Lines](#) | [Scheduled Payments](#) | [Hold Reasons](#)

Line #	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	Quick Coupler Adapter OTC P/N 7342		2 EACH	25.68		51.36	0.00	Approved	126682	7	1	WANI, VALERIE LAKEY	

Detail information for the invoice is displayed.

5- Note the **Payment Information** summary box.

6- Click the **Scheduled Payments** Tab.

Standard Invoice: 9646631557 (Total USD 51.36)

Currency: USD

General

Invoice Date: 22-Jan-2015
 Status: Approved
 On Hold:
 Batch: AP013015
 Attachments: None
 Supplier: GRAINGER INC
 Supplier Site: REMIT ADDR
 Address: P O BOX 419267
 DEPT 423-804980878
 KANSAS CITY, MO 64141-6267

Amount Summary

Item: 51.36
 Freight: 0.00
 Miscellaneous: 0.00
 Tax: 0.00
 Prepayment: 0.00
 Retainage: 0.00
 Withholding Tax: 0.00
 Total: 51.36

Payment Information

Paid: 51.36
 Discount Taken: 0.00
 Due: 0.00
 Status: Paid
 Payment Date: 06-FEB-2015
 Payment: 92209
 Term: NET 30

[Invoice Lines](#) | [Scheduled Payments](#) | [Hold Reasons](#)

Due Date	Amount	Remaining Amount	Remit-to Supplier	Remit-to Supplier Site	Status	Method	First Discount Date	First Discount Amount	Second Discount Date	Second Discount Amount	Third Discount Date	Third Discount Amount
21-Feb-2015	51.36	0.00			Fully Paid	Check						

Payment Schedule information for the invoice is displayed.

7- Click the **Hold Reasons** Tab.



iSupplier Training Guide

Standard Invoice: 9646631557 (Total USD 51.36) Export

Currency= USD

General	Amount Summary	Payment Information
Invoice Date 22-Jan-2015 Status Approved On Hold Batch AP013015 Attachments None Supplier GRAINGER INC Supplier Site REMIT ADDR Address P O BOX 419267 DEPT 423-89486878 KANSAS CITY, MO 64114-6267	Item 51.36 Freight 0.00 Miscellaneous 0.00 Tax 0.00 Prepayment 0.00 Retainage 0.00 Withholding Tax 0.00 Total 51.36	Paid 51.36 Discount Taken 0.00 Due 0.00 Status Paid Payment Date 06-FEB-2015 Payment 92209 Term NET 30

Invoice Lines | Scheduled Payments | Hold Reasons

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
No results found.					

Return to Finance: [View Invoices](#)

Hold and Release information for the invoice is displayed.

8- Click the **Return to Finance: View Invoices** link.

Payments Information

1- Click the **View Payments** link under the **Finance** Tab.

Supplier Home | Orders | Shipments | **Finance** | Administration

[View Invoices](#) | [View Payments](#)

View Payments Export

Simple Search Advanced Search

Note that the search is case insensitive

Payment Number:
 Invoice Number:
 PO Number: (example: 1234)
 Release Number: (example: 1234-2)

Status:
 Payment Amount From: To:
 Payment Date From: (13-Sep-2021) To:

Payment	Remit-to Supplier	Remit-to Supplier Site	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
No search conducted.											

The **View Payments** window is displayed. Note the multiple criteria available for query.

2- Enter the value in the **Invoice Number** field (if known). If not known, click the **Go** button to view all records

3- Click the **Go** button.

Payment	Remit-to Supplier	Remit-to Supplier Site	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number
133531	GRAINGER INC	REMIT ADDR	18-Aug-2021	USD	600.00	Check	Negotiable	18-Aug-2021	WF - Accounts Payable	123456	160589
133425	GRAINGER INC	REMIT ADDR	09-Jun-2021	USD	4,853.70	Check	Reconciled	16-Jun-2021	WF - Accounts Payable	Multiple	Multiple
133335	GRAINGER INC	REMIT ADDR	02-Jun-2021	USD	9,036.98	Check	Reconciled	08-Jun-2021	WF - Accounts Payable	Multiple	Multiple
133242	GRAINGER INC	REMIT ADDR	26-May-2021	USD	3,839.59	Check	Reconciled	01-Jun-2021	WF - Accounts Payable	Multiple	Multiple

Search results are displayed.



iSupplier Training Guide

4- Click the **Payment** link to view detail information.

Payment: 133531 (Total USD 600.00) Export

Payment Date	18-Aug-2021	Supplier	GRAINGER INC
Method	Check	Supplier Site	REMIT ADDR
Status	Negotiable	Address	P O BOX 419267
Status Date	18-Aug-2021	Address	DEPT 423-804898878
Remit to Supplier	GRAINGER INC	Bank Account	KANSAS CITY MO 64141-4267
Remit to Supplier Site	REMIT ADDR		WF - Accounts Payable

Included Invoices

Invoice	Invoice Date	Type	Currency	Amount	Status	Payment Status	Payment PO Number	Receipt	Attachments
123456	18-Aug-2021	Standard	USD	600.00	Approved	Paid	600.00 160589		

Return to Finance: [View Payments](#)

Detail information for the payment is displayed. If more information is required, click the Invoice Number link to view additional details for invoices associated with the payment.

5- Click the **Return to Finance: View Payments** link.



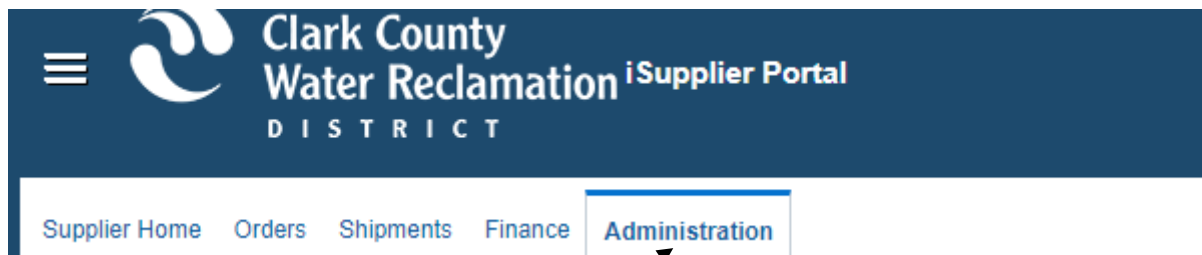
Topic 5: iSupplier Administrative Updates

Registered iSupplier users can maintain updated profile information directly through the portal. Changes to address, contact, product, and business classification information can be submitted for review and approval by CCWRD purchasing administration.

This topic covers:

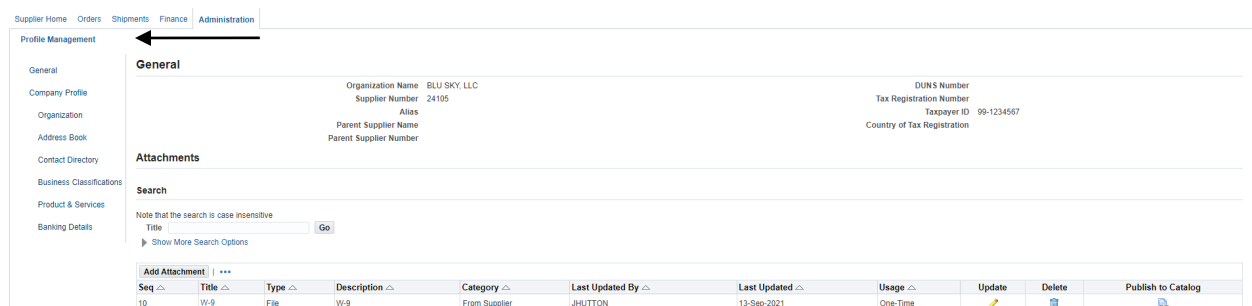
- Access to the Admin Tab for viewing and updating profile information
- Updating supplier address information
- Updating supplier contact information
- Updating supplier product information
- Updating supplier business classification information

Access the Admin Tab



The **Home Page** is displayed.

- 1- Click the **Administration** Tab.



The **Profile Management** window is displayed. Use this window to update all profile information.

Update Supplier Address



iSupplier Training Guide

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile Organization Address Book Contact Directory Business Classifications Product & Services Banking Details

Organization Name: BLU SKY, LLC
Supplier Number: 24105
DUNS Number
Tax Registration Number
Taxpayer ID: 99-1234567
Country of Tax Registration

Attachments

Search

Note that the search is case insensitive
Title: Go

Show More Search Options

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time			

1- Within the Profile Management section, click the **Address Book** link.

Address Book

Create | +

Address Name	Address Details	Country	Update	Remove
PO/REMIT ADDR	73 BLUE SKY AVE LAS VEGAS, NV 89122	United States		

The **Address Book** window is displayed. All current addresses for the supplier are listed here.

2- If Supplier needs to update address information, click the **Update** icon.

Administration: Profile Management: Address Book >

Update Address Cancel Save

* Indicates required field

Supplier Name: BLU SKY, LLC
Supplier Number: 24105
Phone Area Code: 702
Phone Number: 560-0123
Fax Area Code
Fax Number
Email Address: BSORDERS@GMAIL.COM

* Address Name: PO/REMIT ADDR
PLEASE INPUT ALL INFORMATION IN CAPS. Please enter the Address Name in one of the following options: PO/REMIT ADDR - If the address is both purchasing and payment address, PO ADDR - If the address is a Purchasing address, REMIT ADDR - If the address is a Payment address.

Country: United States

* Address Line 1: 73 BLUE SKY AVE
Address Line 2
Address Line 3
Address Line 4

* City/Town/Locality: LAS VEGAS
Country
State/Region: NV
Please use the two-letter abbreviation for the state (Ex: NV).
Province
Postal Code: 89122

Purchasing Address
Please select this box if the address is a Purchasing Address.
 Payment Address
Please select this box if the address is a Payment Address.
 RFO Only Address
NOTE: If Supplier uses PO/REMIT ADDR, they must check both Purchasing and Payment Address above.

Address Purpose

Purpose	Remove
Address Book: Address	

The **Update Address** window is displayed. Use this window to make any changes or additions to address information.

3- Enter revised address in applicable fields.

4- Click the **Save** button.

Note: DO NOT use this function to replace the existing address with a new address. Instead, create a new entry for the new contact person and inactivate the outdated record for the existing contact person by selecting the "trash can" icon in the **Remove** column.

Confirmation

Details for your PO/REMIT ADDR address have been modified.

The **Confirmation** window is displayed.



Update Supplier Contact Information

Supplier Home | Orders | Shipments | Finance | Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory ← **Attachments**

Business Classifications

Product & Services

Banking Details

General

Organization Name: BLU SKY, LLC
Supplier Number: 24105
DUNS Number
Tax Registration Number
Taxpayer ID: 99-1234567
Country of Tax Registration

Parent Supplier Name
Parent Supplier Number

Search

Note that the search is case insensitive

Title

Show More Search Options

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time			

1- Within the **Profile Management** field, click the **Contact Directory** link.

Contact Directory : Active Contacts

Create

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
JOHN	SMITH	702-333-1234	BLUSKY@GMAIL.COM	Current	<input checked="" type="checkbox"/>			

The **Contact Directory: Active Contacts** window is displayed. All active contacts for the supplier are listed here.

2- If Supplier needs to update contact information for the existing contact person, click the **Update** icon. **Note: DO NOT** use this function to replace the existing contact person with a new contact person. Instead, create a new entry for the new contact person and inactivate the outdated record for the existing contact person by selecting the “trash can” icon in the **Remove** column.

Update Contact

* Indicates required field

PLEASE INPUT ALL INFORMATION IN CAPS

Contact Title

First Name

Middle Name

* Last Name

Alternate Name

Job Title

Department

* Contact Email

URI

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Contact Purpose

+

Purpose	Remove
No results found.	

The **Update Contact** window is displayed. Use this window to make any changes or additions to contact information.

- 3- Update the relevant fields.
- 4- Click the **Save** button.
- 5- Use the “+” icon to select a “purpose” for the contact (optional)

Confirmation

Contact details for JOHN SMITH have been saved



iSupplier Training Guide

The **Confirmation** window is displayed. Note: within **Contact Directory : Active Contacts** the **Status** column will indicate a **Change Pending** status until approved by CCWRD purchasing administration.

Update Products and Services Information

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

General

Organization Name: BLU SKY, LLC
 Supplier Number: 24105
 Atlas
 Parent Supplier Name
 Parent Supplier Number

DUNS Number
 Tax Registration Number
 Taxpayer ID: 99-1234567
 Country of Tax Registration

Attachments

Search

Note that the search is case insensitive
 Title
 Show More Search Options

Add Attachment

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time			

1- Within the **Profile Management** field, click the **Products & Services** link.

Products and Services

Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/>	PROFESSIONAL SERVICES	PROFESSIONAL SERVICES EXCLUDING THOSE SPECIFICALLY LISTED	13-Sep-2021	Approved

The **Products & Services** window is displayed. All current **approved** products and services for the supplier are listed.

2- If Supplier needs to update **Products & Services** information, click the **Add** button.

Administration: Profile Management: Product & Services

Add Products and Services: (BLU SKY, LLC)

Browse All Products & Services
 Search for Specific Product & Service

Code **Products and Services** **View Sub-Category** **Applicable**

ABRASIVES	ABRASIVES		<input type="checkbox"/>
ABSORBENT MEDIA	ABSORBENT MEDIA INCLUDING BARK, ACTIVATED CARBON, PERSNIKIT		<input type="checkbox"/>
ACTUATORS	ACTUATORS		<input type="checkbox"/>
ADVERTISING	ADVERTISING		<input type="checkbox"/>
AERIAL SURVEYS	AERIAL SURVEYS		<input type="checkbox"/>
AGGREGATE, SAND, SILT	AGGREGATE, SAND, SILT		<input type="checkbox"/>
APPLIANCES	APPLIANCES AND EQUIPMENT (EXCLUDING KITCHEN APPLIANCES)		<input type="checkbox"/>
ARCHITECT/ENGINEERING SUPPLIES	ARCHITECTURAL & ENGINEERING SUPPLIES, SURVEYING, TESTING EQUIPMENT, DRAWING INSTRUMENTS, AND SUPPLIES		<input type="checkbox"/>
ARCHITECTURAL SERVICES	ARCHITECTURAL SERVICES, DESIGN, LANDSCAPE ARCHITECTS		<input type="checkbox"/>
AUCTIONEERING SERVICES/SURPLUS PROP	AUCTIONEERING SERVICES/SURPLUS PROPERTY, CATEGORY ESTABLISHED TO IDENTIFY SUPPLIERS INTERESTED IN PURCHASE OF ANY OBSOLETE SURPLUS PROPERTY		<input type="checkbox"/>

The **Add Products and Services** window is displayed. Use this window to browse through the products & services, or select the **Search** option to identify specific products & services.

Note: Only products & services **applicable** to CCWRD are listed or available for search for each supplier.

3- Click the checkbox for the desired Applicable value(s).

4- Click the **Apply** button.



iSupplier Training Guide

Confirmation

The following Product and Service categories have been added to your profile.

- ARCHITECTURAL SERVICES, DESIGN, LANDSCAPE ARCHITECTS

[Return to Products and Services](#)

The **Confirmation** window is displayed.

5- Click the **Return to Products and Services** link.

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Products and Services

Remove Add +...

Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/>	PROFESSIONAL SERVICES	13-Sep-2021	Approved	
<input type="checkbox"/>	ARCHITECTURAL SERVICES	13-Sep-2021	Pending Approval	

The Products and Services window is displayed with the added value.

6- Note: within **Approval Status** column will indicate **Pending Approval** status until approved by CCWRD purchasing administration.

Update Supplier Business Classifications

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

General

Organization Name: BLU SKY, LLC
 Supplier Number: 24105
 DUNS Number
 Tax Registration Number
 Taxpayer ID: 99-1234567
 Country of Tax Registration

Attachments

Search

Note that the search is case insensitive
 Title: Go

Show More Search Options

Add Attachment +...

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time			

1- Within the **Profile Management** field, click on the **Business Classifications** link.

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

Business Classification and Insurance Information

Certification

I certify that I have reviewed the classification below and they are current and accurate.

Last Certified By:

TIP Date format example: 13-Sep-2021

Business Classification and Insurance Information	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
001 Disabled Veteran Business Enterprise	<input type="checkbox"/>				
002 Large Business Enterprise	<input type="checkbox"/>				
003 Minority Owned Business Enterprise	<input type="checkbox"/>				
004 Nevada Business Enterprise	<input type="checkbox"/>				
005 Physically Challenged Business Enterprise	<input type="checkbox"/>				
006 Small Business Enterprise	<input checked="" type="checkbox"/>				
007 Small Business Opportunity Program	<input type="checkbox"/>				
008 State of Nevada Emerging Small Business	<input type="checkbox"/>				
009 Veteran Business Enterprise	<input type="checkbox"/>				
010 Women Owned Business Enterprise	<input checked="" type="checkbox"/>				
011 Insurance Policy	<input type="checkbox"/>				

Cancel Save



iSupplier Training Guide

The **Business Classifications** window is displayed.

- 2- Select all the applicable classifications. Enter additional certifying information if known.
- 3- Click the **Certification** checkbox.
- 4- Click the **Save** button.

Certification

I certify that I have reviewed the classification below and they are current and accurate.

Last Certified 13-Sep-2021 By JOHN SMITH ←

The **Business Classification** window is updated with **Last Certified** information.



Topic 6: iSupplier Registration (New Suppliers)

Prospective Supplier Registration Page

The **Prospective Supplier Registration** screen is displayed.

Within the **Company Details** section of the screen:

- 1- Enter your **Company Name** in the **Company Name** field
- 2- Enter your **Company Taxpayer ID** or **Social Security Number** in the **Company Taxpayer ID** field (refer to field-specific instructions written in blue)

Within the **Contact Information** section of the screen:

- 3- Enter the **E-mail** address of the person responsible for the iSupplier account.
- 4- Enter the **First Name** of the person responsible for the iSupplier account.
- 5- Enter the **Last Name** of the person responsible for the iSupplier account.



iSupplier Training Guide

- 6- Enter the **Phone Area Code** of the person responsible for the iSupplier account.
- 7- Enter the **Phone Area Code** of the person responsible for the iSupplier account.
- 8- Click the **Continue** button in the top right-hand corner to save the information.

Prospective Supplier Registration: Additional Details Page

Upload W9 attachment

Search

Note that the search is case insensitive

(Go)

Show More Search Options

Add Attachment

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.									

1-Within the **Upload W9 attachment** section of the screen, click on the **Add Attachment** link.

Add Attachment Page

Add Attachment

Cancel Add Another Apply

Add Desktop File Text URL

Attachment Summary Information

Title

Description

Category From Supplier

Define Attachment

Type File

URL

Short Text

Long Text

Browse...

The **Add Attachment** screen is displayed.

Add Attachment

Cancel Add Another Apply

Add Desktop File Text URL

Attachment Summary Information

Title

Description

Category From Supplier

Within **Attachment Summary Information** section of the screen:

- 1- Enter the name of the document being uploaded in the **Title** field.
- 2- Enter a brief description of the document being uploaded in the **Description** field.

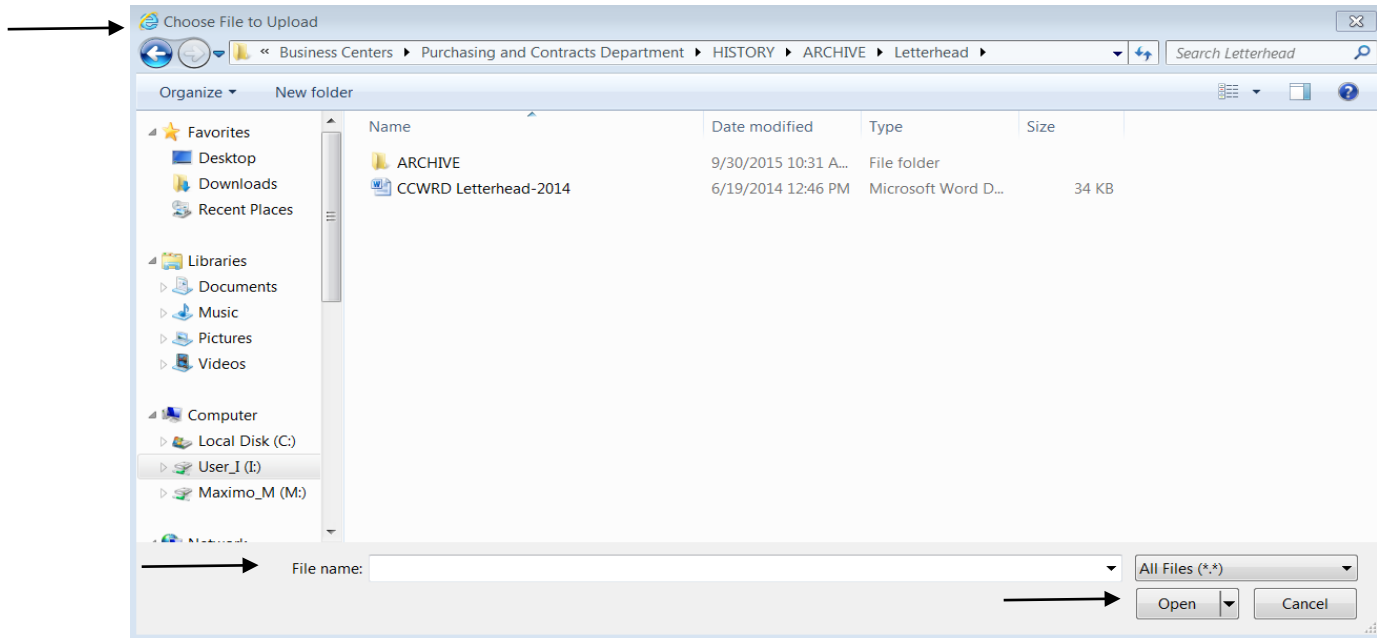


iSupplier Training Guide



Within **Attachment Summary Information** section of the screen:

- 3- The file attachment is selected by default. Click on **Browse** button to add an attachment.



The **Choose File to Upload** screen is displayed.

- 4- Find and select the appropriate file and click the **Open** button.



iSupplier Training Guide

The **Add Attachment** screen is displayed.

- 5- Click the **Apply** button to complete the upload, or click the **Add Another** button to attach another document and repeat the above steps. **Note:** you can change the attachment type to either “URL”, “Short Text” or “Long Text” by selecting the radio-button next to appropriate option.

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
10	W-9	File	W-9	From Supplier	GUEST	13-Sep-2021	One-Time		

The **Confirmation** screen is displayed.

6. In the “Note to Buyer” field, type in the full name (and section if known) of the District employee requesting you to register via iSupplier (if applicable). For example: “Jane Jones/Engineering” or “Jane Jones.”

The **Address Book** section of the screen is displayed.

- 1- Click the **Create** button to add company address information

Create Address Page



iSupplier Training Guide

Create Address Cancel Apply

* Indicates required field

*** Address Name**
PLEASE INPUT ALL INFORMATION IN CAPS. Please enter the Address Name in one of the following options: PO/REMIT ADDR - if the address is both Purchasing and Payment address; PO ADDR - if the address is a Purchasing address; REMIT ADDR - if the address is a Payment address.

Country

*** Address Line 1**
Address Line 2

*** City/Town/Locality**
County
*** State/Region**
Please use the two-letter abbreviation for the state(sic: NV)

Province
*** Postal Code**
*** Phone Area Code**
*** Phone Number**

Fax Area Code
Fax Number
Email Address
Please enter the general email address if Supplier has a specific company email such as CompanyABC@XYZ.com. If not, leave the field blank.

Purchasing Address
Please select this box if the address is a Purchasing Address

Payment Address
Please select this box if the address is a Payment Address

RFO Only Address
NOTE: If Supplier uses PO/REMIT ADDR, they must check both Purchasing and Payment Address above.

Address Purpose

Purpose	Remove
No results found.	

- 1- Enter the **Address Name** in the **Address Name** field (refer to the field-specific instructions in written in blue)
- 2- Enter the **Street Number and Name** in the **Address Line 1** field
- 3- Enter the **City** in the **City/Town/Locality** field
- 4- Enter the **County** in the **County** field (if applicable)
- 5- Enter the **State** in the **State/Region** field
- 6- Enter the **County** in the **County** field (if applicable)
- 7- Enter the **Province** in the **Province** field (if applicable)
- 8- Enter the **Postal Code** in the **Postal Code** field
- 9- Enter the **Phone Area Code** in the **Phone Area Code** field
- 10- Enter the **Phone Number** in the **Phone Number** field
- 11- Enter the **Fax Area Code** in the **Fax Area Code** field (if applicable)
- 12- Enter the **Fax Number** in the **Fax Number** field
- 13- Enter the **E-mail Address** in the **E-mail Address** field (refer to the field-specific instructions in written in blue)
- 14- Check the appropriate box or boxes next to Purchasing Address and Payment Address. (refer to the field-specific instructions in written in blue)

Address Purpose (Optional)

Address Purpose

Purpose	Remove
Acknowledgments	

- 1- Once the address information is populated, click on “+” sign to display and select from the available options.
- 2- Click **Apply** in the top right hand-side corner of the screen



iSupplier Training Guide

Contact Directory

At least one entry is required.

Create | ***

First Name	Last Name	Phone	Email	Requires User Account	Update	Delete
JOHN	SMITH	702-333-1234	BLUSKY@GMAIL.COM	✓		

Contact Directory section of the screen is displayed

- 1- Click the **Update** button to update the previously entered information or proceed to the next section
- 2- Click the **Create** button to add additional contact(s)

Business Classification and Insurance Information

TIP Date format example: 13-Sep-2021

Business Classification and Insurance Information	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
001 Disabled Veteran Business Enterprise	<input type="checkbox"/>				
002 Large Business Enterprise	<input type="checkbox"/>				
003 Minority Owned Business Enterprise	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
004 Nevada Business Enterprise	<input type="checkbox"/>				
005 Physically Challenged Business Enterprise	<input type="checkbox"/>				
006 Small Business Enterprise	<input type="checkbox"/>				
007 Small Business Opportunity Program	<input type="checkbox"/>				
008 State of Nevada Emerging Small Business	<input type="checkbox"/>				
009 Veteran Business Enterprise	<input type="checkbox"/>				
010 Women Owned Business Enterprise	<input type="checkbox"/>				

Rows 1 to 11

Business Classification and Insurance Information section of the screen

- 1- Review the **Business Classification and Insurance Information** column and check the box(es) in the **Applicable** column next to all applicable options
- 2- Enter information in the **Minority Type**, **Certificate Number**, **Certifying Agency** and **Expiration Date** fields if applicable (refer to the section-specific information/instructions written in blue)
- 3- Proceed to the next section

Products and Services

At least one entry is required.

Create | ***

Code	Products and Services	Delete
No results found.		

[Submit](#) [Save For Later](#) [Back](#)

Products and Services section of the screen

- 1- Click the **Create** button to populate the list of the current products and services that may be purchased by CCWRD and are available for supplier selection.



iSupplier Training Guide

Add Products and Services: : (BLU SKY, LLC) Cancel Apply

Browse All Products & Services
 Search for Specific Code and Product

Code	Products and Services	View Sub-Categories	Applicable
ABRASIVES	ABRASIVES		<input type="checkbox"/>
ABSORBENT MEDIA	ABSORBENT MEDIA INCLUDING BARK, ACTIVATED CARBON, PERSNIKITY		<input type="checkbox"/>
ACTUATORS	ACTUATORS		<input type="checkbox"/>
ADVERTISING	ADVERTISING		<input type="checkbox"/>
AERIAL SURVEYS	AERIAL SURVEYS		<input type="checkbox"/>
AGGREGATE, SAND, SILT	AGGREGATE, SAND, SILT		<input type="checkbox"/>
APPLIANCES	APPLIANCES AND EQUIPMENT (EXCLUDING KITCHEN APPLIANCES)		<input type="checkbox"/>
ARCHITECT/ENGINEERING SUPPLIES	ARCHITECTURAL & ENGINEERING SUPPLIES, SURVEYING, TESTING EQUIPMENT, DRAWING INSTRUMENTS, AND SUPPLIES		<input type="checkbox"/>
ARCHITECTURAL SERVICES	ARCHITECTURAL SERVICES, DESIGN, LANDSCAPE ARCHITECTS		<input type="checkbox"/>
AUCTIONEERING SERVICES/SURPLP PROP	AUCTIONEERING SERVICES/SURPLUS PROPERTY, CATEGORY ESTABLISHED TO IDENTIFY SUPPLIERS INTERESTED IN PURCHASE OF ANY OBSOLETE SURPLUS PROPERTY		<input type="checkbox"/>

Products and Services information is displayed

Add Products and Services: : (BLU SKY, LLC) Cancel Apply

Browse All Products & Services
 Search for Specific Code and Product

Search

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code:
 Description:
 Go Clear

Code	Description	Applicable
ABRASIVES	ABRASIVES	<input type="checkbox"/>
ABSORBENT MEDIA	ABSORBENT MEDIA INCLUDING BARK, ACTIVATED CARBON, PERSNIKITY	<input type="checkbox"/>
ACTUATORS	ACTUATORS	<input type="checkbox"/>
ADVERTISING	ADVERTISING	<input type="checkbox"/>
AERIAL SURVEYS	AERIAL SURVEYS	<input type="checkbox"/>
AGGREGATE, SAND, SILT	AGGREGATE, SAND, SILT	<input type="checkbox"/>
GOVERNMENT AGREEMENT	AGREEMENT WITH ANOTHER GOVERNMENT ENTITY INCLUDING INTERLOCAL AGREEMENTS, MEMORANDUMS OF UNDERSTANDING, ETC.	<input type="checkbox"/>
APPLIANCES	APPLIANCES AND EQUIPMENT (EXCLUDING KITCHEN APPLIANCES)	<input type="checkbox"/>
ARCHITECT/ENGINEERING SUPPLIES	ARCHITECTURAL & ENGINEERING SUPPLIES, SURVEYING, TESTING EQUIPMENT, DRAWING INSTRUMENTS, AND SUPPLIES	<input type="checkbox"/>
ARCHITECTURAL SERVICES	ARCHITECTURAL SERVICES, DESIGN, LANDSCAPE ARCHITECTS	<input type="checkbox"/>

- 2- Review the full list of products and services by clicking the **Next 10** button and check the box(es) in the **Applicable** column next to all applicable products and/or services offered by your company; OR
- 3- Enter a specific product or service offered by your company in the **Description** field followed by the **%** sign and click the **Go** button

Add Products and Services: : (BLU SKY, LLC) Cancel Apply

Browse All Products & Services
 Search for Specific Code and Product

Search

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code:
 Description:
 Go Clear

Code	Description	Applicable
PROFESSIONAL SERVICES	PROFESSIONAL SERVICES EXCLUDING THOSE SPECIFICALLY LISTED	<input type="checkbox"/>

- 4- If the search is successful, the selected product or service will be populated; check the box in the **Applicable** column
- 5- Click the **Apply** button



iSupplier Training Guide

Products and Services

At least one entry is required.

Create | ...

Products and Services	Products and Services	Delete
PROFESSIONAL SERVICES	PROFESSIONAL SERVICES EXCLUDING THOSE SPECIFICALLY LISTED	

Submit Save For Later Back

- 6- The selected product or service is added to your registration request
- 7- Repeat the steps as needed
- 8- Review the information in **Upload W-9 Attachment, Address Book, Contact Directory, Business Classification and Insurance Information, Products and Services** sections of the screen and click the **Submit** button.

Confirmation

Thank you for submitting Supplier registration request. The request has been submitted for review and Supplier will be notified of registration status via email once the review has been completed by the Clark County Water Reclamation District.

The **Confirmation** window is displayed.

E-mail correspondence from CCWRD regarding Prospective Supplier Registration

For Your Information: Clark County Water Reclamation District Supplier Collaboration Network: Registration Submitted

W WFFINS <orawfimafINF@cleanwaterteam.com>
 Mon 9/13/2021 9:25 AM
 To: JOHN SMITH <BLUSKY@GMAIL.COM>

To: JOHN SMITH
 Sent: 13-SEP-21 16:24:15
 ID: 5194991

Your registration details have been submitted. Use this URL to track progress on this request.
[Prospective Supplier Registration Status Page](#)

Reply | Forward

- 1- Receive **Registration Submitted** e-mail and click the **Prospective Supplier Registration Status Page** to view the details of your company registration

For Your Information: Clark County Water Reclamation District Supplier Collaboration Network: Confirmation of Registration

W WFFINS <orawfimafINF@cleanwaterteam.com>
 Mon 9/13/2021 9:39 AM
 To: JOHN SMITH <BLUSKY@GMAIL.COM>

Notification Detail.html
 742 bytes

To: JOHN SMITH
 Sent: 13-SEP-2021 16:36:51
 ID: 5194994

You have been registered at Clark County Water Reclamation District for access to their supplier collaboration network. You can log in with the username BLUSKY@GMAIL.COM.
 In order to generate/reset your password, please click the below link and follow the instructions. This link is only available for 10080 minutes.
 Contact jhinton@cleanwaterteam.com for additional information.

Password Url: [Reset your password](#)



iSupplier Training Guide

- 1- Receive **Confirmation of Registration** e-mail containing the **username information, Password Url** link for password reset and CCWRD Procurement contact information.
- 2- Password Reset link is only available for a limited amount of time. If the link is no longer available, please contact CCWRD Procurement Team



Topic 7: iSupplier Bank Account Management (New Suppliers/ Existing Suppliers)

iSupplier portal users will have direct access to manage their banking information through the **Admin** Tab. This Tab provides access to company profile that can be updated by the iSupplier User from his/her user account.

This topic covers:

- Overview of the Admin Tab
- Review of Banking details

Scenario 1: Creating a new bank account

1- Click on the **Administration** Tab

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time			

3- Then click on **Banking Details** Tab. This will display a page to **Create** a new bank account

Details Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
No results found.										

3- Click on **Create** Button, **Create Bank Account** Page will be displayed



iSupplier Training Guide

Administration: Profile Management: Banking Details >
Create Bank Account Cancel Save

* indicates required field

Country: United States

Bank

Existing Bank

Bank Name:
 Bank Number:
 Tax Payer ID:

[Show Bank Details](#)

Branch

Existing Branch

ABA / Routing Number:
 Branch Number:
 BIC:
 Branch Type: ABA

[Show Branch Details](#)

Bank Account

Account Number:
 Check Digits:
 IBAN:

[Show Account Details](#)

Account Name:
 Currency:
 Account Status: New

Comments

Note to Approver:

4.1- In the **Branch** section of the screen, select **Existing Branch (Radio Button)** then click on **ABA/Routing Number** magnifying glass to search and select the appropriate routing number. **TIP:** Use **"%"** sign to display all available records. Once the routing number is selected, the **Bank Name** field in the **Bank** section of the screen will be automatically populated with the correct bank name.

IMPORTANT: DO NOT type in/enter the information in the **Bank Name** field manually. This will cause issues/delays with ACH payments.

Administration: Profile Management: Banking Details >
Create Bank Account Cancel Save

* indicates required field

Country: United States

Bank

Existing Bank

Bank Name:
 Bank Number:
 Tax Payer ID:

[Show Bank Details](#)

Branch

Existing Branch

ABA / Routing Number:
 Branch Number:
 BIC:
 Branch Type: ABA

[Show Branch Details](#)

Bank Account

Account Number:
 Check Digits:
 IBAN:

[Show Account Details](#)

Account Name:
 Currency:
 Account Status: New

Comments

Note to Approver:

Search and Select: ABA / Routing Number

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: Branch Name

Sel...	Quick Select	Branch Name	Branch Number	Bank Name	Bank Number	BIC	Branch Type
<input type="radio"/>	<input type="checkbox"/>	107006936	107006936	COMPASS BANK		ABA	
<input type="radio"/>	<input type="checkbox"/>	111317857	111317857	COMPASS BANK		ABA	

4.2- Use the **Quick Select** icon to add the banking information

Administration: Profile Management: Banking Details >
Create Bank Account Cancel Save

* indicates required field

Country: United States

Bank

Existing Bank

Bank Name: COMPASS BANK
 Bank Number:
 Tax Payer ID:

[Show Bank Details](#)

Branch

Existing Branch

ABA / Routing Number: 107006936
 Branch Number: 107006936
 BIC:
 Branch Type: ABA

[Show Branch Details](#)

Bank Account

Account Number:
 Check Digits:
 IBAN:

[Show Account Details](#)

Account Name:
 Currency:
 Account Status: New

Comments

Note to Approver:

4.3- Bank Section will be auto-populated with the bank name



iSupplier Training Guide

IMPORTANT: If the bank information has been entered in the wrong format and approved by the District, it cannot be updated. A new Bank Account request must be submitted in the correct format (see Item 4.1 above) and the bank account entered in the wrong format must be end-dated.

Administration: Profile Management: Banking Details >
Create Bank Account Cancel Save

* Indicates required field

Country: United States

Bank **Branch**

Existing Bank: Bank Name: COMPASS BANK, Bank Number, Tax Payer ID
 Existing Branch: ABA / Routing Number: 107006935, Branch Number: 107006935, BIC, Branch Type: ABA

Bank Account

Account Number: XXXXXX7891, Account Name: NEW, Currency: USD, Account Status: New

Comments

Note to Approver: Please approve bank account for future use

4.4 Enter the new **Account Number** and **Account Name** and other Information in the **Bank Account** section of the screen (as needed). Enter comments (if any) in the **Note to Approver** field in the **Comments** section of the screen and click on **Save** Button

Confirmation
 Bank account XXXXXX7891 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.

5 - **Confirmation** notification of the new bank account is displayed.

Banking Details Cancel Save

View: General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.
 Date format example: 13-Sep-2021

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXX7891			COMPASS BANK	13-Sep-2021		1			New	

6- The added Bank Account is in **New** Status awaiting approval by the **CCWRD Supplier Profile Administrator**.

9- Receive an e-mail notification from **CCWRD** regarding approval of the newly added bank account.



iSupplier Training Guide

For Your Information: Supplier Profile Management: Approval of Bank Account

WFFINS <orawfimapFINF@cleanwaterteam.com>
 Mon 9/13/2021 1:17 PM
 To: JOHN SMITH <BLUSKY@GMAIL.COM>

Notification Detail.html
 742 bytes

To: JOHN SMITH
 Sent: 13-SEP-2021 20:15:14
 ID: 5195016

Your request to create COMPASS BANK account XXXXXX7891 has been approved.

Notes from Administrator:
 approved

Thank you.

10- Note: CCWRD newly added bank account approval is a two-step process. Depending on the CCWRD approval timing, you may see different details associated with the newly added bank account.

CCWRD Step 1. Supplier will see the following details

Supplier Home Orders Shipments Finance Administration

Profile Management

Banking Details [Cancel] [Save]

View: General Accounts [Go]

Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 13-Sep-2021

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXX7891			COMPASS BANK	13-Sep-2021		1			Approved	

Account Name: NEW
 Bank Number: 107006936
 Branch Number: 107006936
 Account Type: 107006936
 Branch Name: 107006936

Assignment Status: Awaiting approval for general use of account

CCWRD Step 2. Supplier will see the following details

Supplier Home Orders Shipments Finance Administration

Profile Management

Banking Details [Cancel] [Save]

View: General Accounts [Go]

Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 13-Sep-2021

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXX7891			COMPASS BANK	13-Sep-2021		1			Approved	

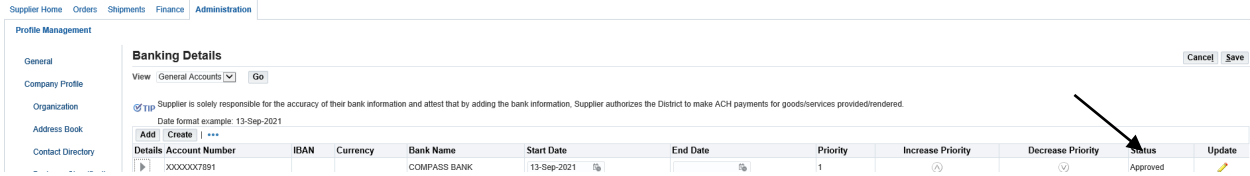
Account Name: NEW
 Bank Number: 107006936
 Branch Number: 107006936
 Account Type: 107006936
 Branch Name: 107006936

Assignment Status: Priority and effectivity dates approved

11- Once fully approved by CCWRD Supplier Profile Administrator, the newly added bank account will be ready for use.



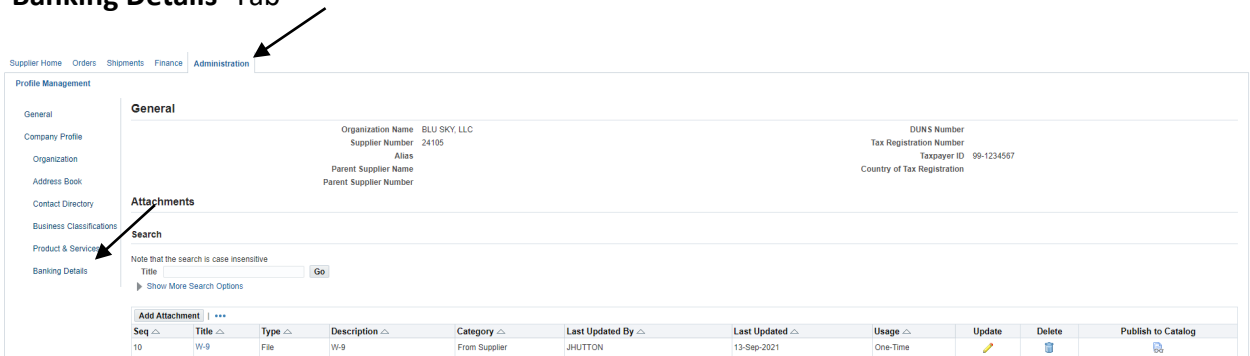
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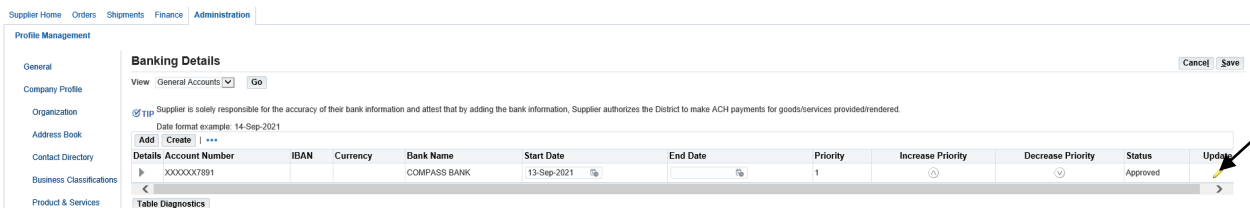
12- Note: New Banks cannot be created by the iSupplier users. If a bank is not available under the Existing Banks, iSupplier users should e-mail CCWRD via procurementsolutions@cleanwaterteam.com with a request to create the new banks/branches.

Scenario 2: Making changes to an existing bank account

1- Login with 'iSupplier User' Account and Click on the 'Administration' Tab then click on 'Banking Details' Tab



2- This will display a page with all bank accounts associated with supplier account. Click on **Update** pencil next to the bank account requiring revision



3- It will display the **Update Bank Account** Page. Make the changes as needed. For example: Add (or change) **Account Name** and provide **Note to Approver** (as needed) in the **Comments** section of the screen. Click on **Save** Button.



iSupplier Training Guide

Update Bank Account Cancel Save

Country United States

Bank **Branch**

Bank Name COMPASS BANK ABA / Routing Number 107006936
 Bank Number Branch Number 107006936
 Tax Payer ID BIC
Branch Type ABA

▶ Show Bank Details ▶ Show Branch Details

Bank Account

Account Number XXXXXX7891 Account Name NEW BANK
 Check Digits Currency
 IBAN Account Status Approved

▶ Show Account Details

Comments

Note from Approver None
 Note to Approver Updating Account Name

4- Now the Bank Account shows as **Change Pending** Status awaiting review and approval by **CCWRD Supplier Profile Administrator**

Supplier Home Orders Shipments Finance Administration

Profile Management

General **Confirmation**
 Bank account XXXXXX7891 has been modified. These changes will be routed to an administrator for approval.

Company Profile **Banking Details** Cancel Save

Organization View General Accounts Go

Address Book **Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.**

Contact Directory Date format example: 14-Sep-2021

Business Classifications Add Create

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
▶	XXXXXX7891			COMPASS BANK	13-Sep-2021		1	⬆	⬇	Change Pending	✎

Table Diagnostics

5- Once approved by **CCWRD Supplier Profile Administrator**, Login with 'iSupplier User' User Account to verify that the changes to the existing bank account are in approved status

Supplier Home Orders Shipments Finance Administration

Profile Management

General **Banking Details** Cancel Save

Company Profile View General Accounts Go

Organization **Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.**

Address Book Date format example: 14-Sep-2021

Contact Directory Add Create

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
▶	XXXXXX7891			COMPASS BANK	13-Sep-2021		1	⬆	⬇	Approved	✎

Table Diagnostics



iSupplier Training Guide

Scenario 3: End Dating the existing bank account

1- Login with 'iSupplier User' Account and Click on the 'Administration' Tab then click on 'Banking Details' Tab

Supplier Home Orders Shipments Finance Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

General

Organization Name: BLU SKY, LLC
Supplier Number: 24105
DUNS Number
Tax Registration Number
Alias
Parent Supplier Name
Taxpayer ID: 99-1234567
Country of Tax Registration

Attachments

Search

Note that the search is case insensitive

Title: [] Go

Show More Search Options

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time	[]	[]	[]

2- This will display a page with all bank accounts associated with supplier account. Select the **End Date** for the appropriate bank account

Profile Management

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Product & Services

Banking Details [Cancel] [Save]

View: General Accounts [Go]

Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add | Create | +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
[]	XXXXXX7891			COMPASS BANK	13-Sep-2021	[]	1	[]	[]	Approved	[]

Table Financiotre

3- Click on **Save** button

Supplier Home Orders Shipments Finance Administration

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Product & Services

Banking Details [Cancel] [Save]

View: General Accounts [Go]

Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add | Create | +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
[]	XXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	1	[]	[]	Approved	[]

Table Diagnostics

4- Receive following confirmation notification as 'Account Assignments' have been updated

Confirmation

The general account assignments have been updated.

5- Click on " [] " icon in the **Details** column next to the updated bank account to take note of the status of your change request by viewing comments in the **Assignment Status** field as



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shown below. It shows that the Account Assignment Request is awaiting approval by the **CCWRD Supplier Profile Administrator**

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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	1	⬆	⬇	Approved	✎

Account Name NEW BANK
Bank Number
Branch Number 107006936

Account Type
Branch Name 107006936

Assignment Status Changes awaiting approval

6- Once approved by **CCWRD Supplier Profile Administrator**, the comments in the **Assignment Status** field will change as shown below.

Supplier Home Orders Shipments Finance Administration

Profile Management

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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	1	⬆	⬇	Approved	✎

Account Name NEW BANK
Bank Number
Branch Number 107006936

Account Type
Branch Name 107006936

Assignment Status Priority and effectivity dates approved

Scenario 4: Increase/Decrease the Priority of a bank account (for Multiple Bank Accounts)

1- Login with 'iSupplier User' Account and Click on the 'Administration' Tab then click on 'Banking Details' Tab

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General

Organization Name BLU SKY, LLC
Supplier Number 24105
DUNS Number
Tax Registration Number
Taxpayer ID 99-1234567
Country of Tax Registration

Attachments

Search

Note that the search is case insensitive
Title Go

Show More Search Options

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	W-9	File	W-9	From Supplier	JHUTTON	13-Sep-2021	One-Time	✎	🗑	📄

2- This will display a page with all bank accounts associated with supplier account. Change the priority of the Bank Accounts as needed by clicking on the "up" and "down" arrows in the **Increase Priority/Decrease Priority** columns.



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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add Create | + + +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	1			Approved	

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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add Create | + + +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	1			Approved	
	XXXXXXXX1111			CHAFFEY FCU	14-Sep-2021		2			Approved	

3- Click on **Save** Button once the priority is changed

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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add Create | + + +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	XXXXXXXX1111			CHAFFEY FCU	14-Sep-2021		1			Approved	
	XXXXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	2			Approved	

4- Receive the following confirmation message as 'Account Assignments' have been updated

Confirmation

The general account assignments have been updated.

5- Click on "▶" icon in the **Details** column next to the updated bank account to take note of the status of your change request by viewing comments in the **Assignment Status** field as shown below. It shows that the Account Assignment Request is awaiting approval by the **CCWRD Supplier Profile Administrator**

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Banking Details Cancel Save

View General Accounts Go

Tip Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Date format example: 14-Sep-2021

Add Create | + + +

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
▶	XXXXXXXX1111			CHAFFEY FCU	14-Sep-2021		1			Approved	
				Account Name Bank Number Branch Number			Account Type Branch Name				
				Assignment Status: Awaiting approval for general use of account							
▶	XXXXXXXX7891			COMPASS BANK	13-Sep-2021	14-Sep-2021	2			Approved	
				Account Name Bank Number Branch Number			Account Type Branch Name				
				Assignment Status: Changes awaiting approval							

6- Once approved by **CCWRD Supplier Profile Administrator**, the comments in the **Assignment Status** field will change as shown below



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Profile Management

Banking Details Cancel Save

View: General Accounts

General TIP Supplier is solely responsible for the accuracy of their bank information and attest that by adding the bank information, Supplier authorizes the District to make ACH payments for goods/services provided/rendered.

Company Profile |

Organization Date format example: 14-Sep-2021

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
	X00000001111			CHAFFEY FCU	14-Sep-2021		1	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Approved	<input type="button" value="✎"/>
				Account Name			Account Type				
				Bank Number			Branch Name				
				Branch Number	322280375						
Assignment Status Priority and effectivity dates approved											
	X000007891			COMPASS BANK	13-Sep-2021	14-Sep-2021	2	<input type="button" value="↑"/>	<input type="button" value="↓"/>	Approved	<input type="button" value="✎"/>
				Account Name	NEW BANK		Account Type				
				Bank Number	107006936		Branch Name				
				Branch Number	107006936						
Assignment Status Priority and effectivity dates approved											

END OF TRAINING SCENARIO PRESENTATION



iSupplier Training Guide

Congratulations! You now have been introduced to the following user functionalities:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments Tab and related functions
- Use the Finance Tab and related functions
- Perform profile updates through the Admin Tab
- Register with the District (New Suppliers)

If additional information and/or assistance are/is required, please contact CCWRD procurement administration at procurementsolutions@cleanwaterteam.com with your questions and/or concerns.