

Brookdale Supplier Help Guide: Oracle

Quick Reference Guide

This guide covers the following topics:

1. Supplier Registration on Oracle Supplier Portal (OSP)
2. Invoice Submission (Note: Invoices must be submitted via the OSP)
3. Supplier Information Updates (Ex: Address change, Bank account change, etc)

Supplier Registration on Oracle Supplier Portal

1. You will receive a registration link via email.
2. Click the link or enter into your internet browser.
3. Enter your email address for a one time access code. Click "Send Access Code" button.

Brookdale Senior Living

Supplier Registration

Enter your email
Get a one-time access code to start.

Required
Send Access Code

4. Enter the code you receive into the code box.

Brookdale Senior Living

Supplier Registration

Enter your code
Use the code we've sent to email
[Redacted Code]
The code expires in 15 minutes.

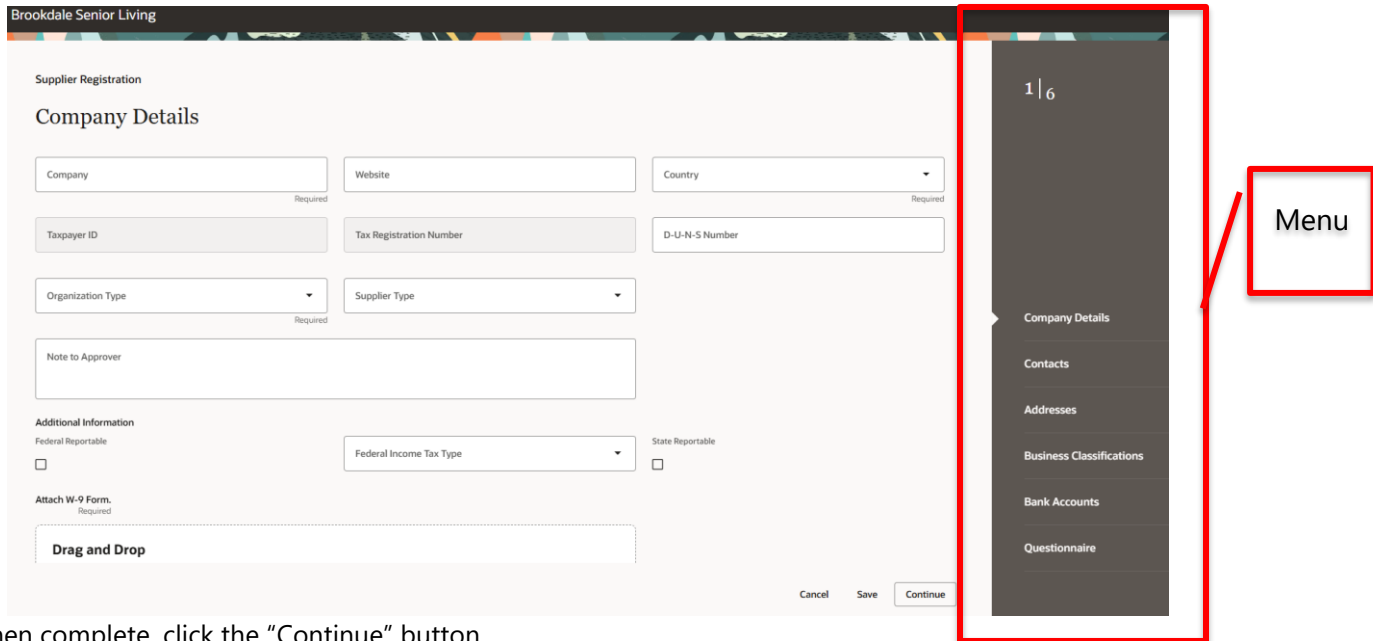
Required
Continue
[Get a new code](#)

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Important Note: Use the Menu on the right side of the screen to navigate between the pages within the registration. Clicking the back button will kick you out of the registration.

- Complete the information in the "Company Details" section. Note Company Name, Country, Organization Type, Taxpayer ID, & W-9 are required fields. **Please attach a signed/dated W-9, as this is required.**



Brookdale Senior Living

Supplier Registration

Company Details

Company Required Website Required Country Required

Taxpayer ID Required Tax Registration Number Required D-U-N-S Number

Organization Type Required Supplier Type

Note to Approver

Additional Information

Federal Reportable ☐ Federal Income Tax Type State Reportable ☐

Attach W-9 Form. Required

Drag and Drop

Cancel Save Continue

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Menu

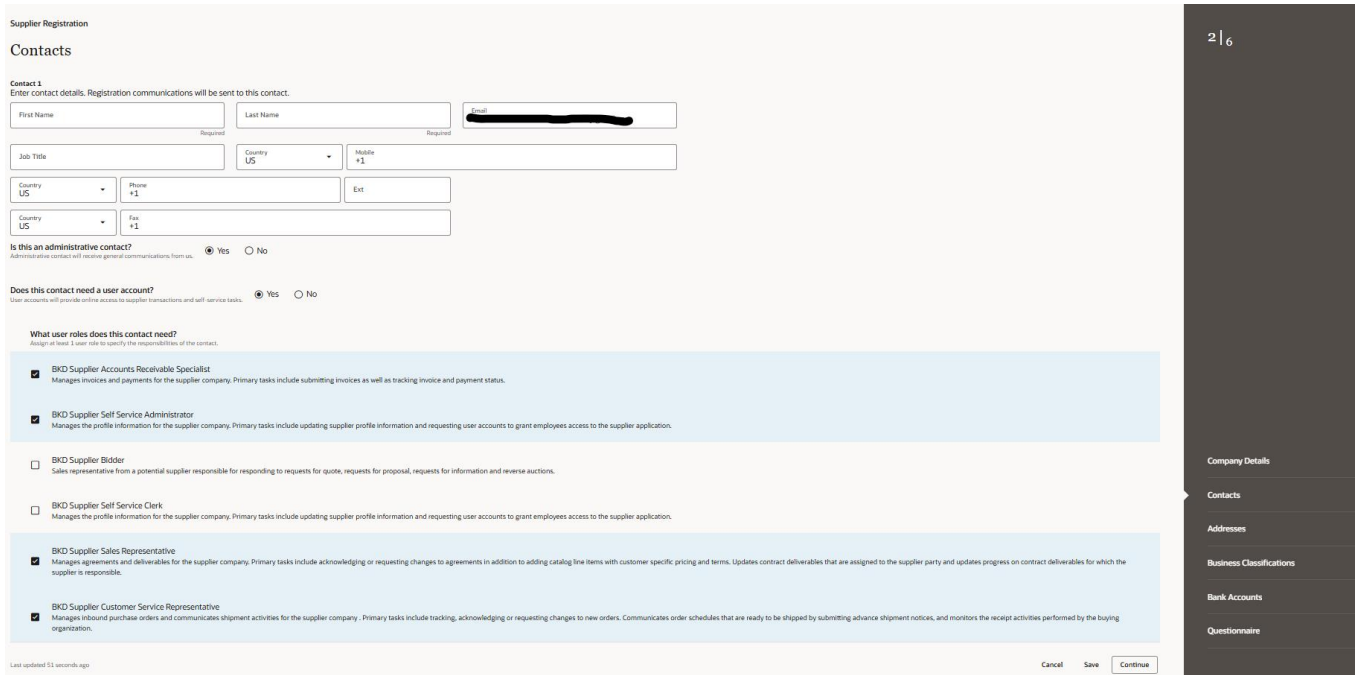
- Company Details
- Contacts
- Addresses
- Business Classifications
- Bank Accounts
- Questionnaire

- When complete, click the "Continue" button

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- Complete the "Contacts" section. Note first & last name fields are required. You can add additional contacts by selecting the "Add Another Contact" button at bottom of page. At least one contact at your company should be a designated Administrative Contact. All contacts who need access to Brookdale in Oracle should answer "Yes" to the "Does this contact need a user account" question.



Supplier Registration

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name Last Name

Job Title Country Middle

Country Phone Ext

Country Fax

Is this an administrative contact?
Administrative contact will receive general communications from us. ☒ Yes ☐ No

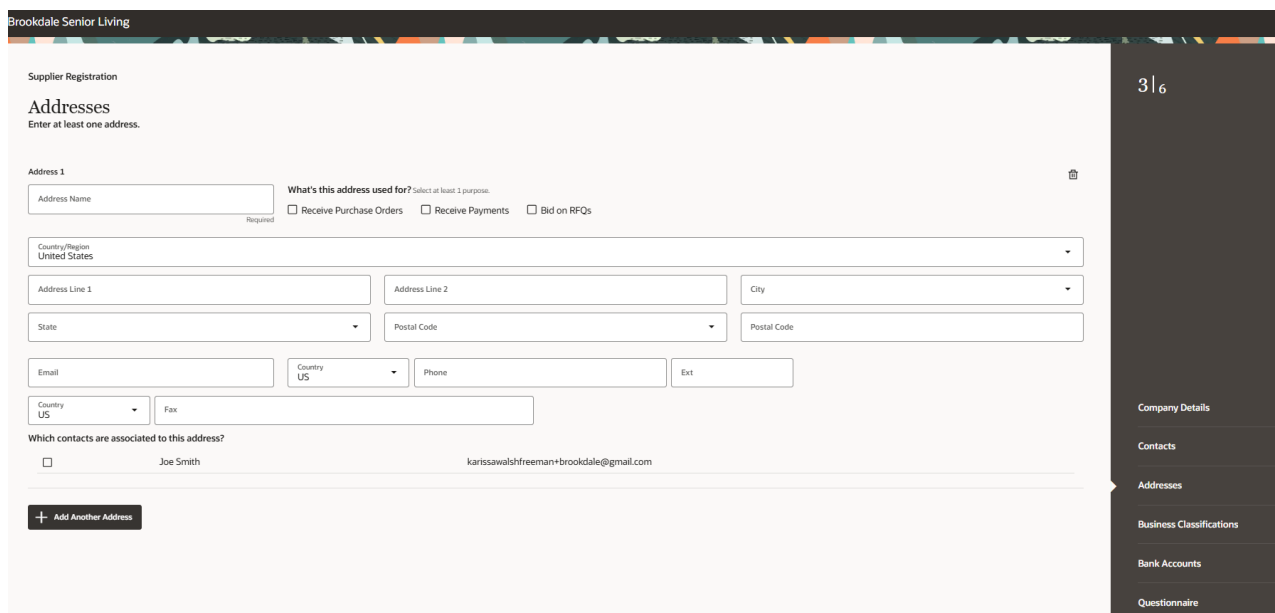
Does this contact need a user account?
User accounts will provide online access to supplier transactions and self service tasks. ☒ Yes ☐ No

What user roles does this contact need?
Assign at least 1 user role to specify the responsibilities of the contact.

- ☒ **BKD Supplier Accounts Receivable Specialist**
Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
- ☒ **BKD Supplier Self Service Administrator**
Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
- ☐ **BKD Supplier Bidder**
Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.
- ☐ **BKD Supplier Self Service Clerk**
Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
- ☒ **BKD Supplier Sales Representative**
Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
- ☒ **BKD Supplier Customer Service Representative**
Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices, and monitors the receipt activities performed by the buying organization.

Last updated 51 seconds ago Cancel Save Continue

- Select "Continue" when finished entering all contact information.
- Complete the "Addresses" section. Add address name, select what this address is to be used for, enter address & check the box to identify which contact is associated with this address.



Supplier Registration

Addresses

Enter at least one address.

Address 1

Address Name

What's this address used for? Select at least 1 purpose.
☐ Receive Purchase Orders ☐ Receive Payments ☐ Bid on RFQs

Country/Region

Address Line 1 Address Line 2 City

State Postal Code Postal Code

Email Country Phone Ext

Country Fax

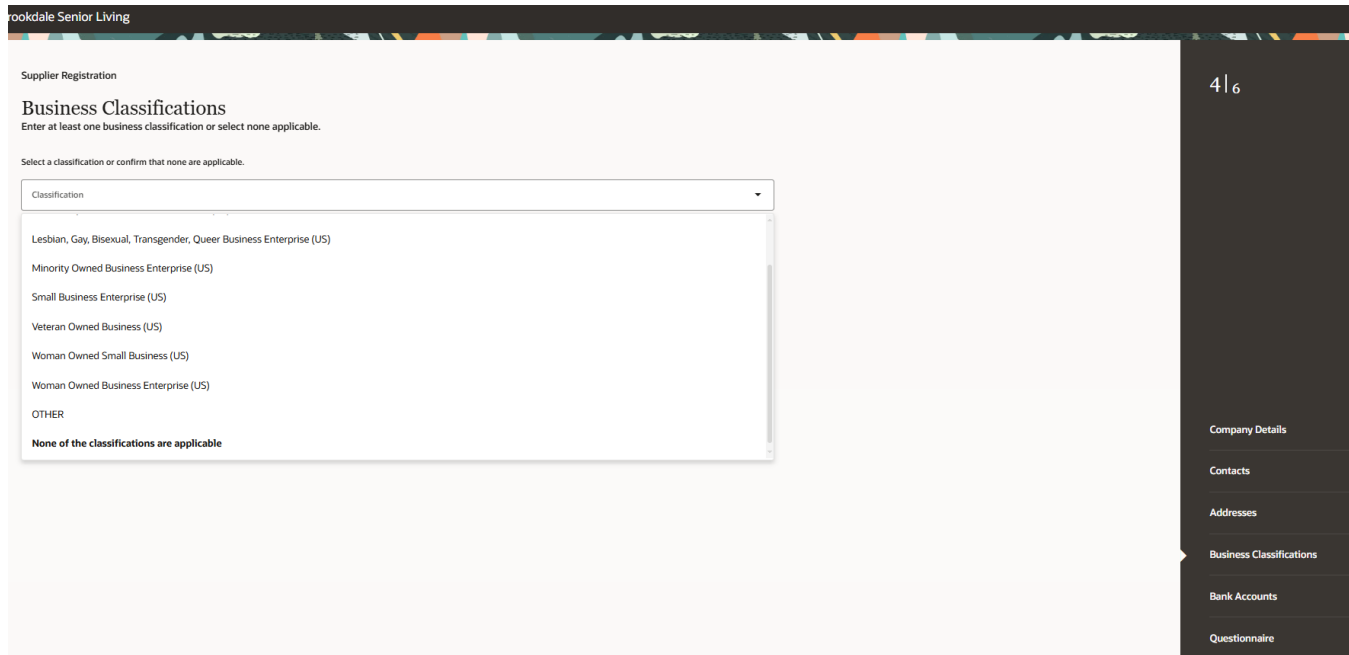
Which contacts are associated to this address?

☐ Joe Smith karissawalshfreeman@brookdale@gmail.com

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10. When complete, click the "Continue" button
11. Complete the "Business Classifications" section. If none are applicable, scroll to the bottom of the drop down list & select "None of the classifications are applicable."



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Supplier Registration

Business Classifications

Enter at least one business classification or select none applicable.

Select a classification or confirm that none are applicable.

Classification

- Lesbian, Gay, Bisexual, Transgender, Queer Business Enterprise (US)
- Minority Owned Business Enterprise (US)
- Small Business Enterprise (US)
- Veteran Owned Business (US)
- Woman Owned Small Business (US)
- Woman Owned Business Enterprise (US)
- OTHER
- None of the classifications are applicable**

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- Company Details
- Contacts
- Addresses
- Business Classifications**
- Bank Accounts
- Questionnaire

12. When complete, click the "Continue" button

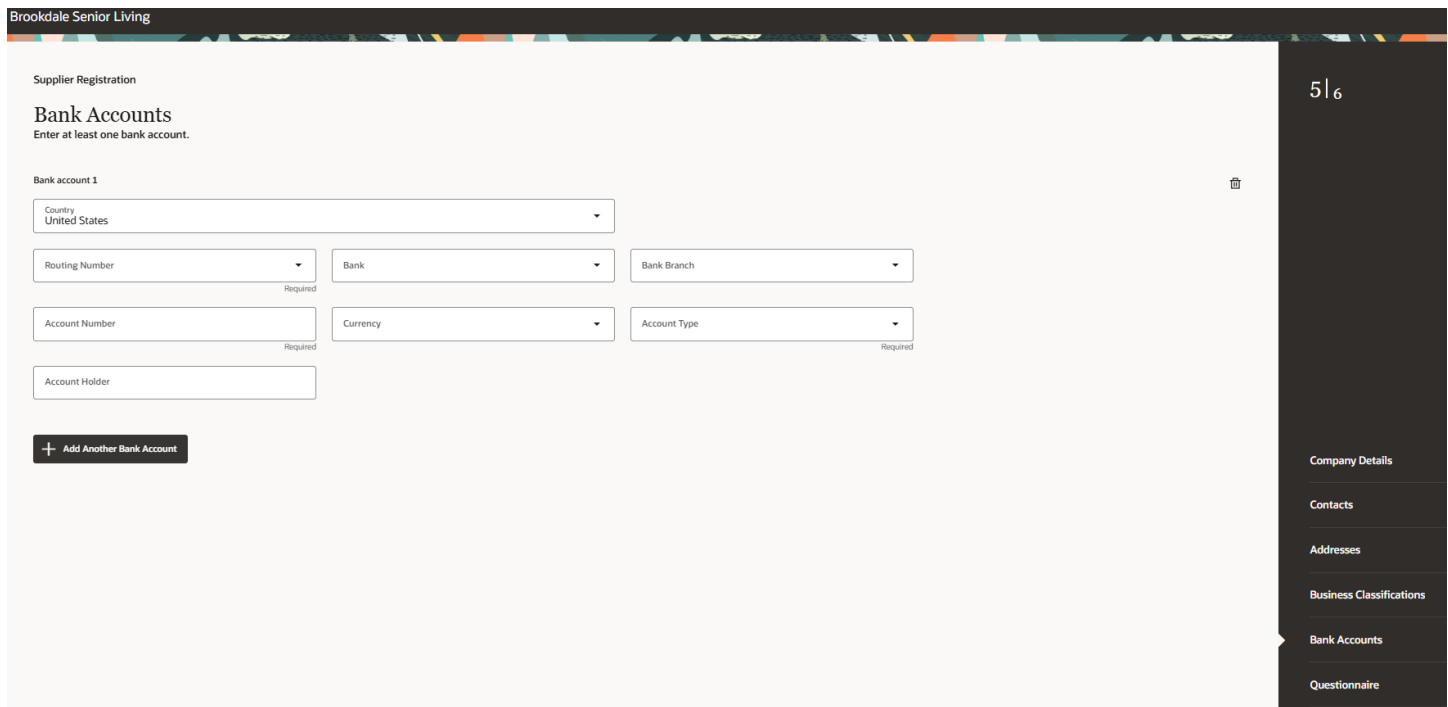
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13. Complete the Bank Account section.

Note: You will be prompted to complete this section even if you plan on selecting the AP Control Card Payment Method. If you will be choosing the AP Control Card payment method, please complete this section as follows:

- Routing Number: Select first in the list (RIVERFRONT FCU)
- Account Number: "AP CONTROL CARD"
- Account Type: Select first option in the drop down (Checking)



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Supplier Registration

Bank Accounts

Enter at least one bank account.

Bank account 1

Country
United States

Routing Number
Required

Bank
Required

Bank Branch
Required

Account Number
Required

Currency
Required

Account Type
Required

Account Holder

+ Add Another Bank Account

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Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Questionnaire

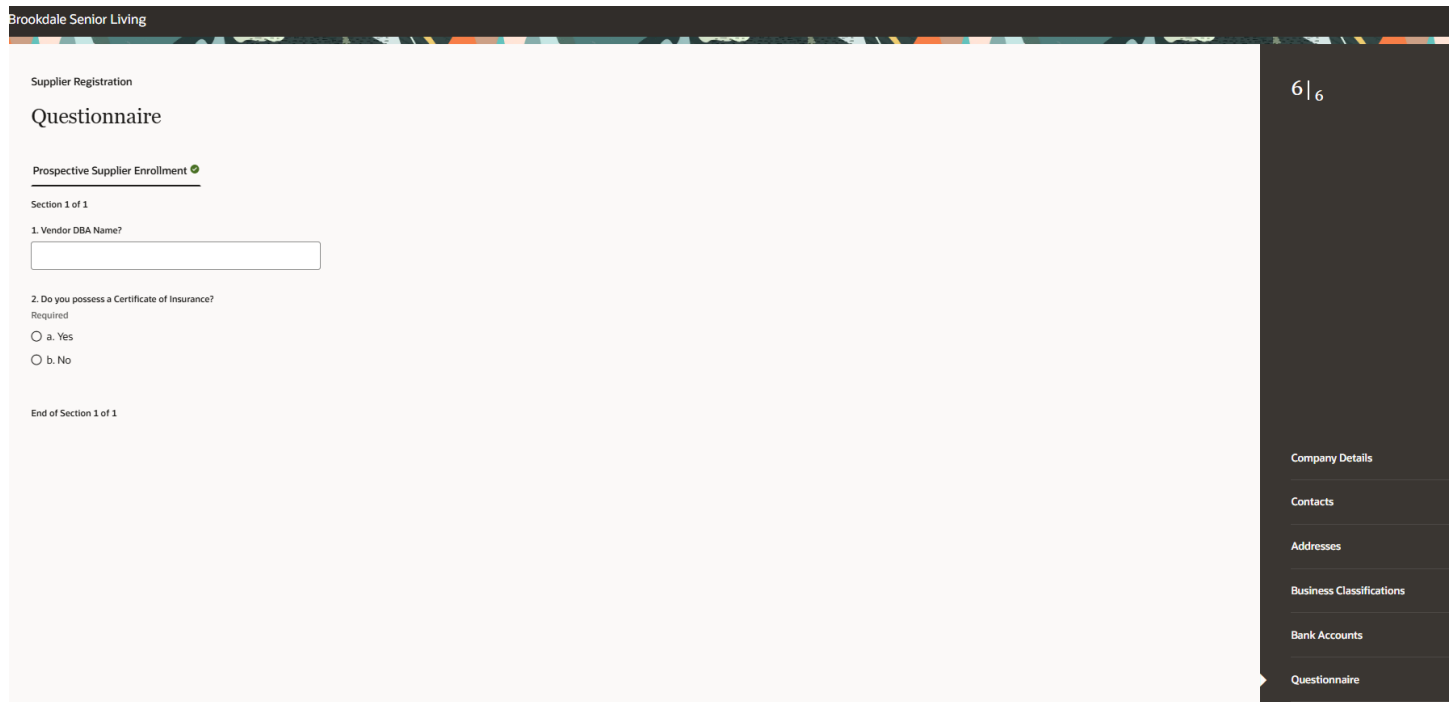
14. When complete, click the "Continue" button

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15. Complete all mandatory questions in the "Questionnaire" section. If your company does not have a dba name, please enter "N/A" for this question.



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Supplier Registration

Questionnaire

Prospective Supplier Enrollment 

Section 1 of 1

1. Vendor DBA Name?

2. Do you possess a Certificate of Insurance?
Required

☐ a. Yes

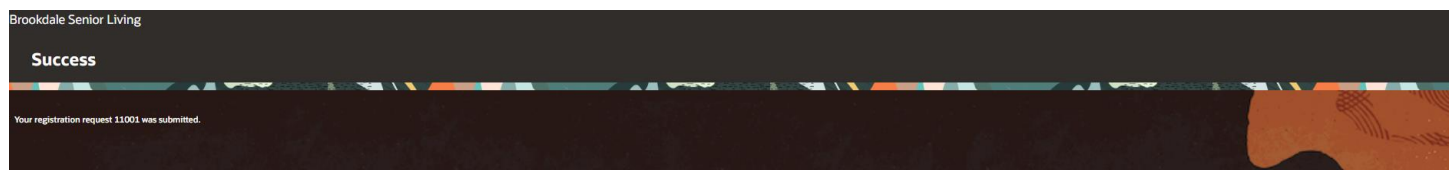
☐ b. No

End of Section 1 of 1

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- Company Details
- Contacts
- Addresses
- Business Classifications
- Bank Accounts
- Questionnaire

16. Click the "Submit" button when complete.
17. If you have any missing information, you will see be asked to review & enter the missing information. Please enter any missing information & submit.
18. Once you have successfully submitted your registration, you will see the following screen:



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Success

Your registration request 11001 was submitted.

Supplier Invoice Submission

There are two methods of invoice submission:

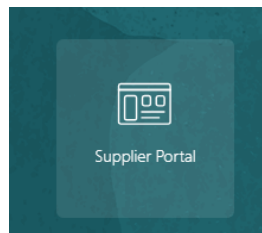
1. Invoice submitted against a Purchase Order – If you are typically issued PO's, you will use this method.
2. Invoice submitted without a Purchase Order – If you are not issued PO's, you will use this method. Ex: Entertainers

Submitting an Invoice against a Purchase Order

IMPORTANT

If you are typically issued PO's for your services, you must submit your invoices against a PO. If you are missing a needed PO, please reach out to the community you are working with to request a PO.

1. Log into Oracle & click on "Supplier Portal" tile.

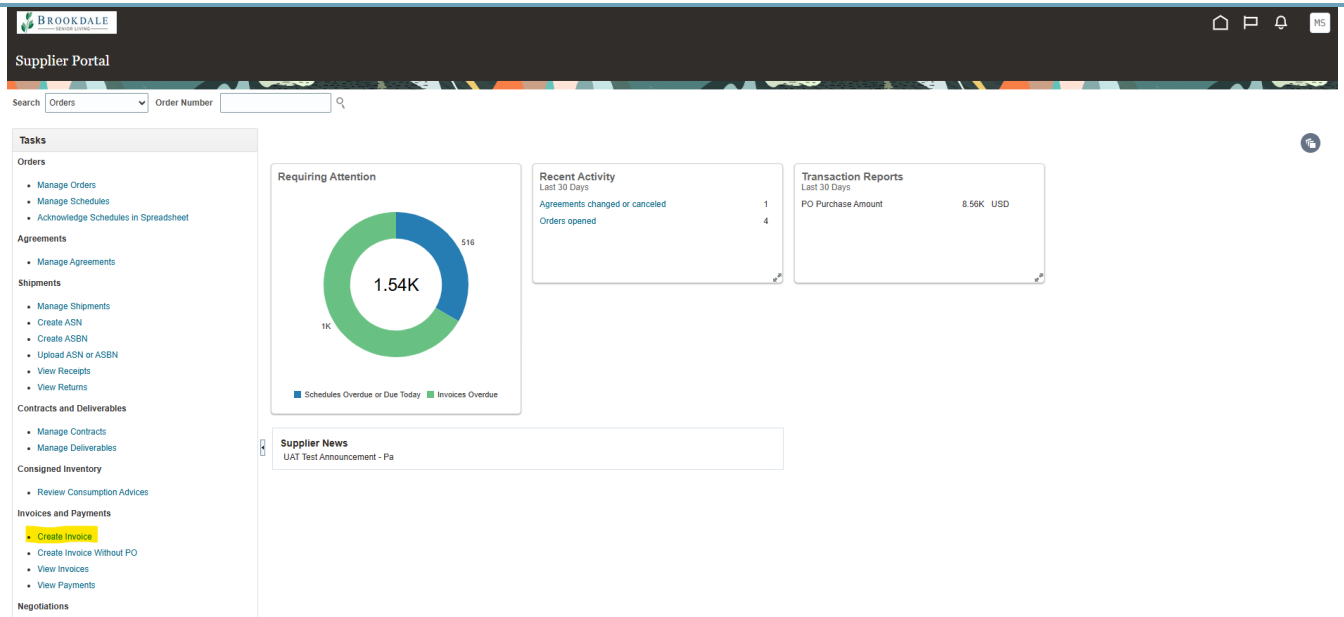


2. Click on "Create Invoice", which is located under the "Invoices and Payments section" on the left of screen

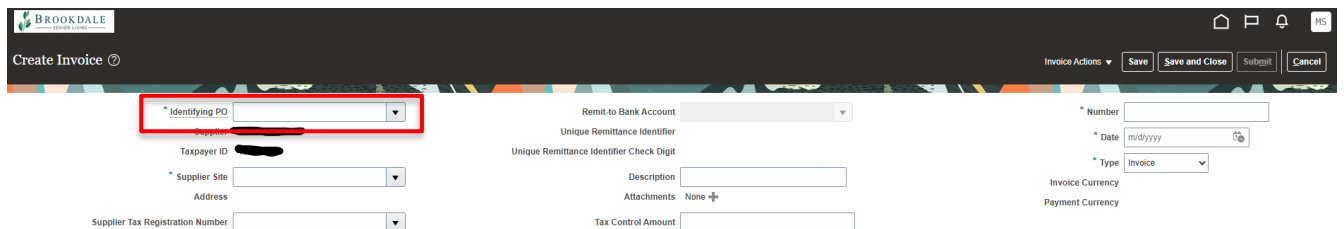
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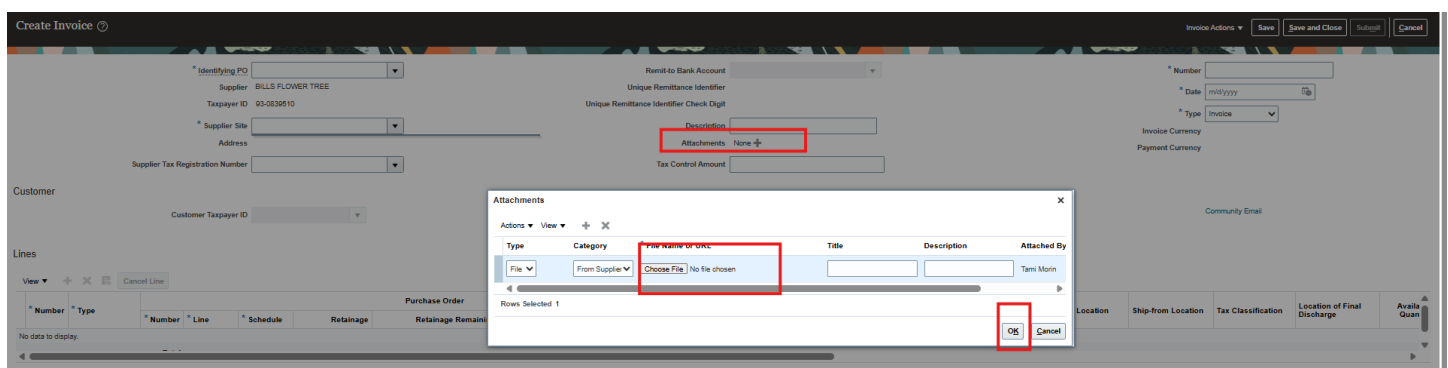
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- Enter "Identifying PO" details or select the drop down arrow & search for the PO number you want to invoice against. If you do not see the PO you are looking for, you can use the "Search" option at the bottom of the drop down box.



- Click on Attachments, then click on choose file, select the invoice copy and click ok.

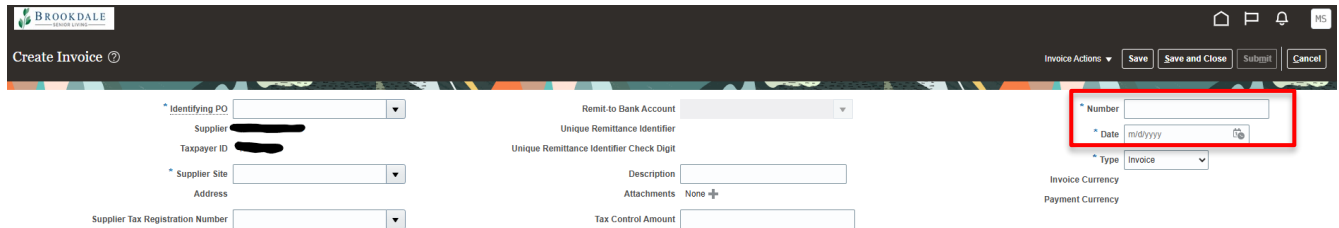


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
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5. Enter the invoice number & date. Click Save.



6. In the Lines section, click the "Select and Add" button.

Lines


View  

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	Amount	Invoice Line Description
Number	Type	Line	Number	Line										
1	Freight													
Total													0.00	

7. Select the desired line by clicking on the line (Do not click the PO# hyperlink). Click "Apply" then "OK".

Select and Add: Purchase Orders


Search

Advanced Saved Search 

** At least one is required



** Purchase Order 353

** Consumption Advice

** Creation Date m/d/yyyy h:mm a 

Search Reset Save...

Search Results



View  

Purchase Order			Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Line	Schedule	Number	Line				
353	1	1			884279	Staples One-Touch ...	24620-Brookdale R...	2

Apply OK Cancel

8. To add a freight line, click the "+" button & select "Freight" and enter the Amount

Lines

View  

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	Amount	Invoice Line Description
Number	Type	Line	Number	Line										
1	Freight													
Total														

9. .

To add Tax lines, click the "+" button & select "Miscellaneous" type and enter the Amount

Lines

View  

Purchase Order			Consumption Advice		Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	Amount	Invoice Line Description
Number	Type	Line	Number	Line										
4	Miscellaneous													

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Note: Optional fields, Ship to location (the Brookdale community you are invoicing), tax classification & Invoice line description. Repeat the process to add any additional charges by adding another line & selecting a different "type" from the drop down. To delete a line, highlight the line you wish to delete, & select the "X" button.

- When you have entered all your invoice information, click the "Save" button & then "Submit."

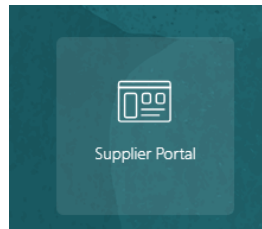


Submitting an Invoice without a PO

IMPORTANT

This invoice submission method is ONLY for suppliers that are NOT issued Purchase Orders.

- Log into Oracle & click on "Supplier Portal" tile.

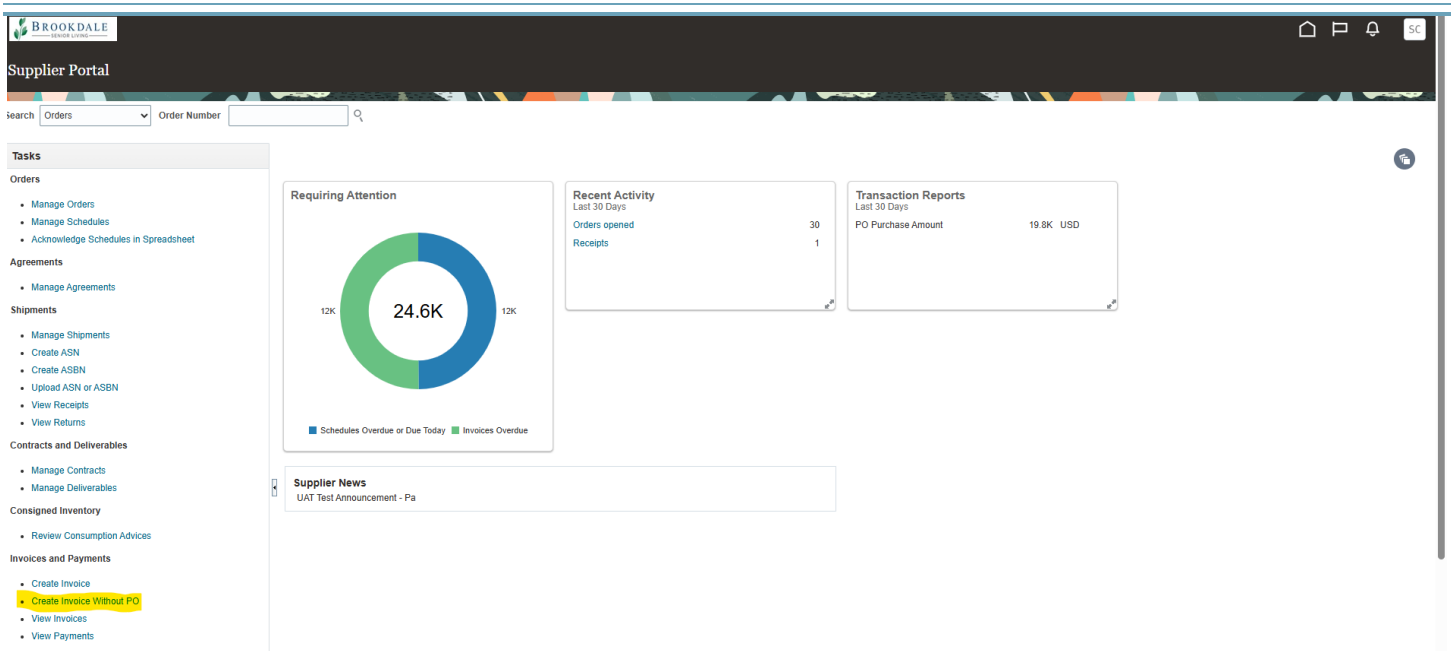


- Click on "Create Invoice Without PO", which is located under the "Invoices and Payments section" on the left of screen

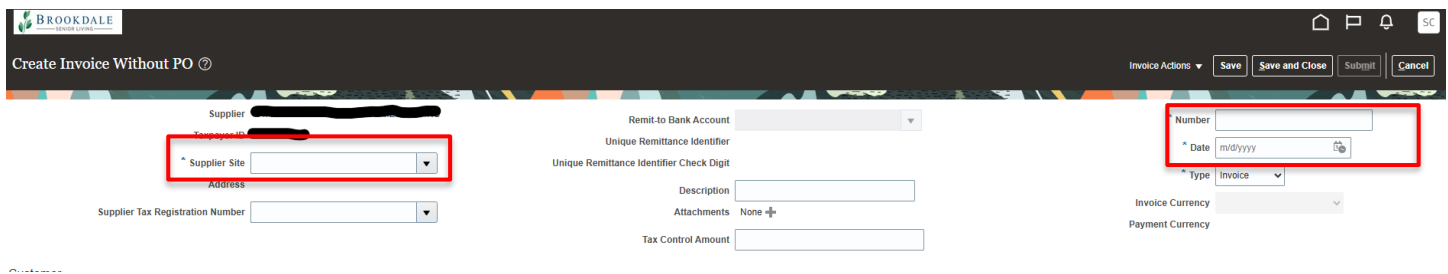
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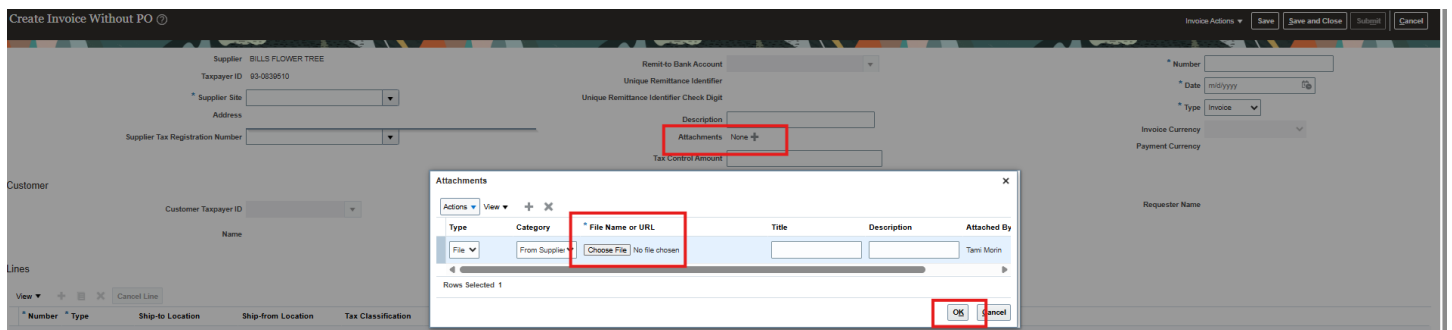
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3. Enter invoice number & date. Select the "supplier site" from the drop down.



4. Click on Attachments, then click on choose file, select the invoice copy and click ok.

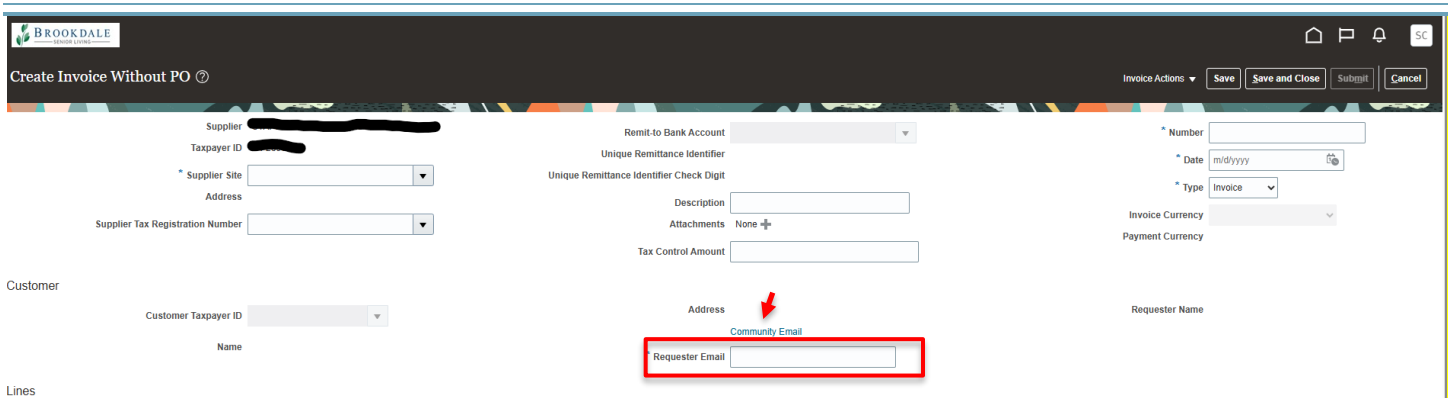


5. In the "Customer" section, enter the Requestor Email. If you do not know the requestor email, click on the "Community Email" link & search for the email for the community you are invoicing.

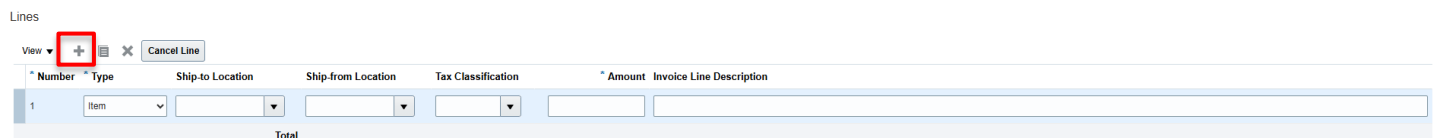
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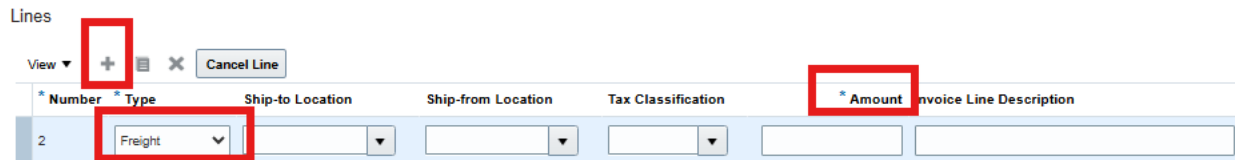
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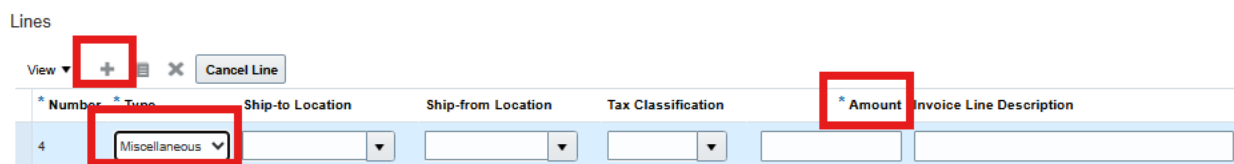
- Click the "+" icon to add line details. Enter the information below. Note: The "Ship-to Location" is the Brookdale community you are invoicing.



- To add a freight line, click the "+" button & select "Freight" and enter the Amount.



To add Tax lines, click the "+" button & select "Miscellaneous" type and enter the Amount



Note: Optional fields, Ship to location (the Brookdale community you are invoicing), tax classification & Invoice line description. Repeat the process to add any additional charges by adding another line & selecting a different "type" from the drop down. To delete a line, highlight the line you wish to delete, & select the "X" button.

- When you have entered all your invoice information, click the "Save" button & then "Submit."



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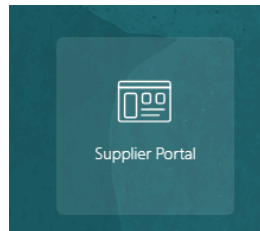
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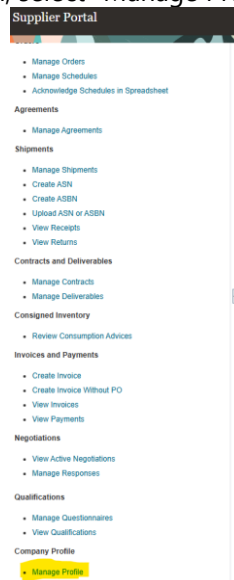
Supplier Information Updates

If any of your supplier information changes, you will use the steps below to update your profile & notify Brookdale.

1. Log into Oracle & select the "Supplier Portal" tile



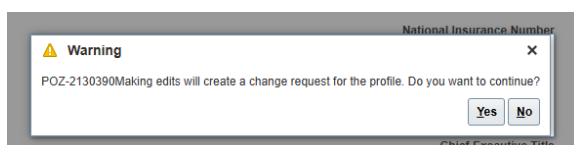
2. From the Task list on the left side of our screen, select "Manage Profile" under the "Company Profile" section.



3. Select "Edit."



4. Click "Yes" when the pop up appears:



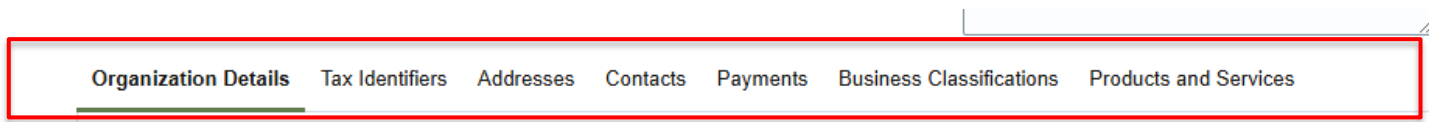
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5. Enter an explanation of your changes in the "Change Description" box:



6. Edit your information as desired in any of the profile tabs:



HINTS FOR EACH PROFILE TAB

- Use the "+" to add something new and the pencil icon to edit an existing item
- **Required fields are marked with an "*"**
- ORGANIZATION DETAILS:
 - Makes desired changes to any of the desired fields.
- TAX IDENTIFIERS:
 - Make desired changes to any of the desired fields.
- ADDRESSES:
 - When adding an address, please name the address with the address number – City Name. Ex: 002-CHICAGO
- CONTACTS
 - A contact won't be able to access your portal unless you check the box for "User Account"
 - Each contact must be tied to an address. In the Contact Addresses section, be sure to click the "Actions" drop down & select "Select & Add". Highlight the address the contact is associated with & click "Apply" & then "OK".

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Create Contact

Salutation

* First Name

Middle Name

* Last Name

Job Title

☐ Administrative contact

Phone

Mobile

Fax

Email

Status

Active

Actions

View

Format

Remove

Select and Add

Columns Hidden: 5

Address

Phone

Address Purpose

Status

User Account

☐ Request user account

Roles

Data Access

Actions

View

Format

Freeze

Detach

Wrap

Role

Description

No data to display.

Create Another

OK

Cancel

- PAYMENTS
 - Use the + sign to add a bank account
 - If you have more than one bank account in your profile, you must indicate which is the primary by highlighting the desired account row & clicking the circle with the checkmark.

Organization Details

Tax Identifiers

Addresses

Contacts

Payments

Business Classifications

Products and Services

Payment Methods

Bank Accounts

Actions

View

Format

+

Freeze

Wrap

Primary

Account Number

IBAN

Currency

Bank Name

656

1ST ADVANTAGE FEDERAL C...

23525

1NB BANK

Columns Hidden: 8

- BUSINESS CLASSIFICATIONS
 - This is where you can add any applicable classifications by clicking the "+" & choosing the desired classification from the drop down that appears. If none of these classifications apply to you, please click the box indicating "none of the classifications are applicable."

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Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** Products and Services

☐ None of the classifications are applicable

Actions ▾ View ▾ Format ▾ + × Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate
No results found.					

- PRODUCTS AND SERVICES:
 - This is an optional section that can be left blank if desired.

7. When you are finished making all your updates, click "Save" & then "Review Changes".

Edit Profile Change Request: 9026

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

8. If everything is correct, click the "Submit" button

BROOKDALE SENIOR LIVING

Review Changes

Edit Submit Cancel

9. Your profile update request will then route to Brookdale for approval. The changes will not be implemented in your profile until they have been fully approved by Brookdale.