

Brookdale Supplier Help Guide: Oracle

Quick Reference Guide

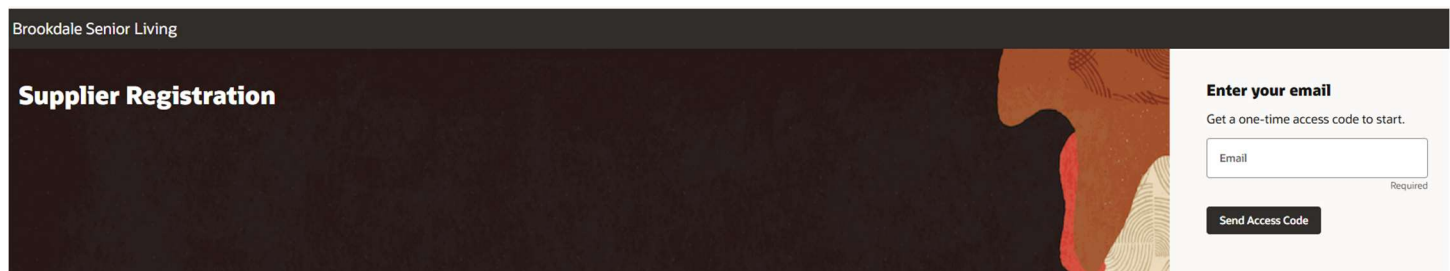
ORACLE
Fusion Applications

This guide covers the following topics:

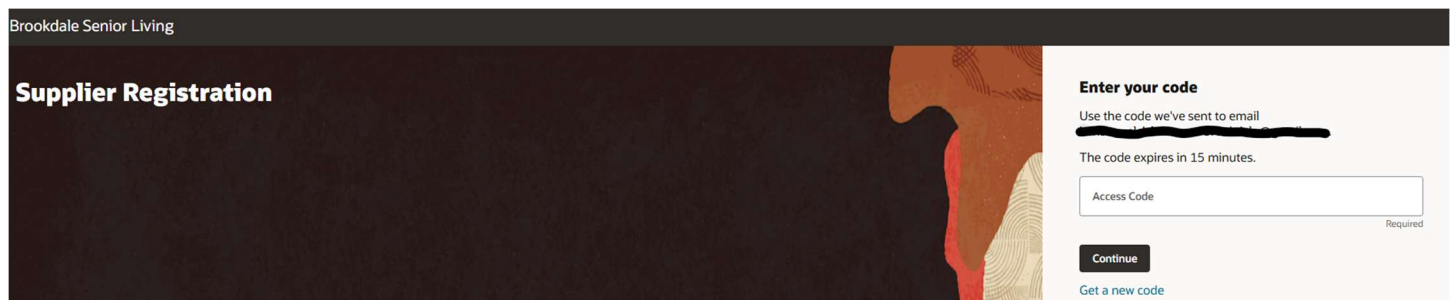
1. Supplier Registration on Oracle Supplier Portal (OSP)
2. Invoice Submission (Note: Invoices must be submitted via the OSP)
3. Supplier Information Updates (Ex: Address change, Bank account change, etc)

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.



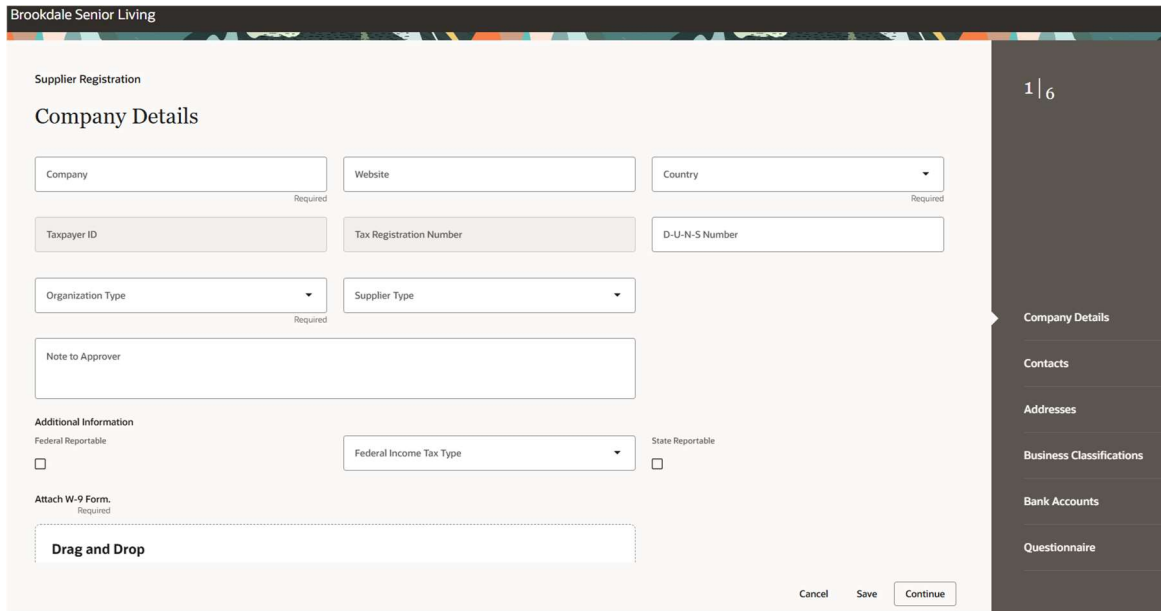
4. Enter the code you receive into the code box.



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- Complete the information in the "Company Details" section. Note Company Name, Country, Organization Type, Taxpayer ID, & W-9 are required fields.



Brookdale Senior Living

Supplier Registration

Company Details

Company Required Website Country Required

Taxpayer ID Tax Registration Number 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

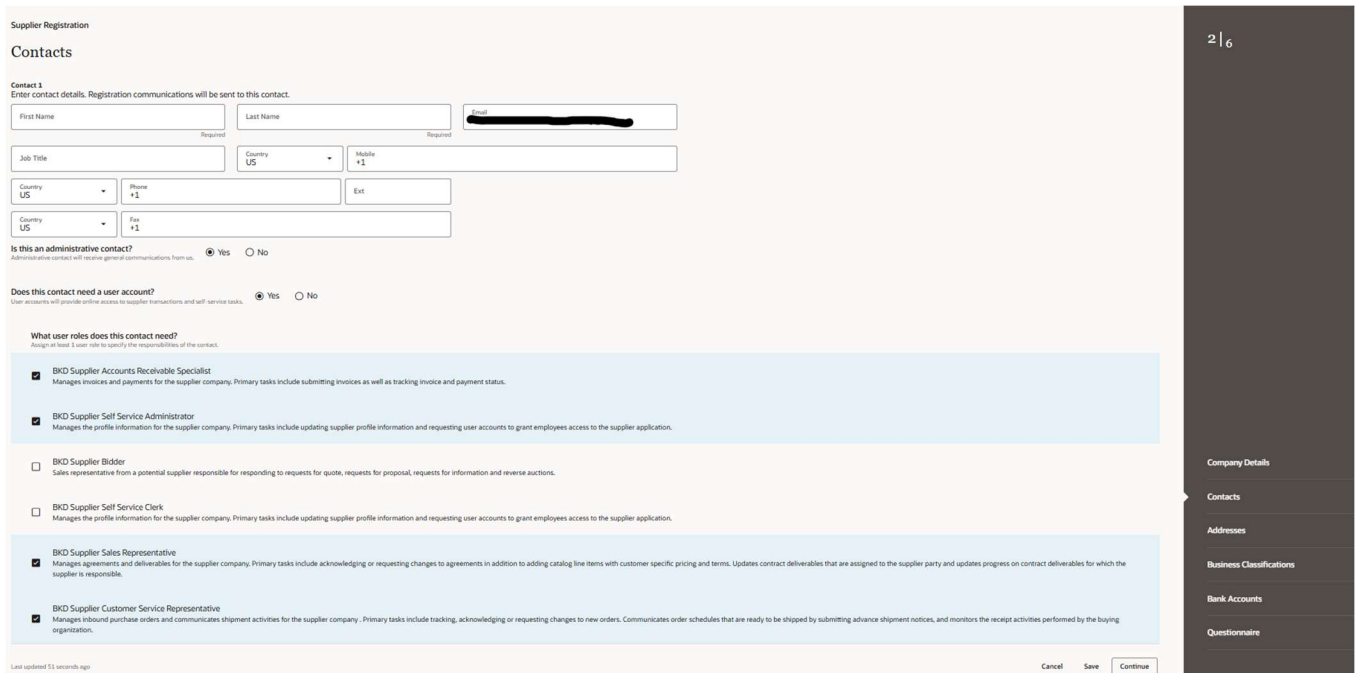
Drag and Drop

Cancel Save Continue

1 | 6

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

- When complete, click the "Continue" button
- 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 Required Last Name Required Email

Job Title Country US Mobile +1

Country US Phone +1 Ext

Country US Fax +1

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

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

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

2 | 6

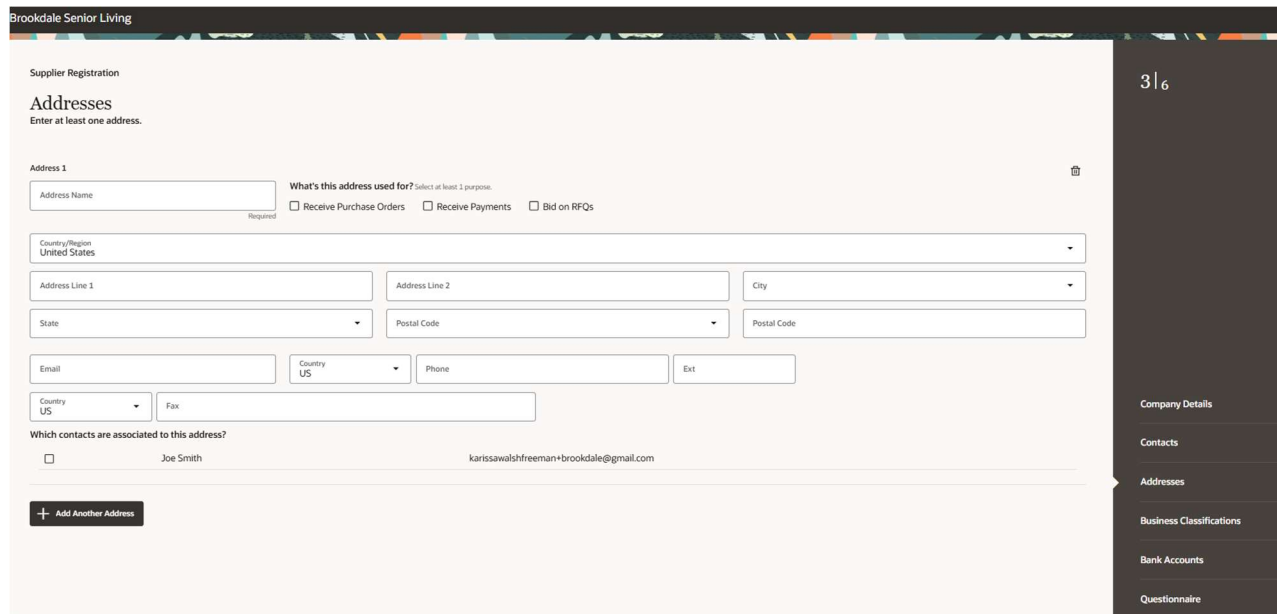
- Company Details
- Contacts
- Addresses
- Business Classifications
- Bank Accounts
- Questionnaire

- Select "Continue" when finished entering all contact information.

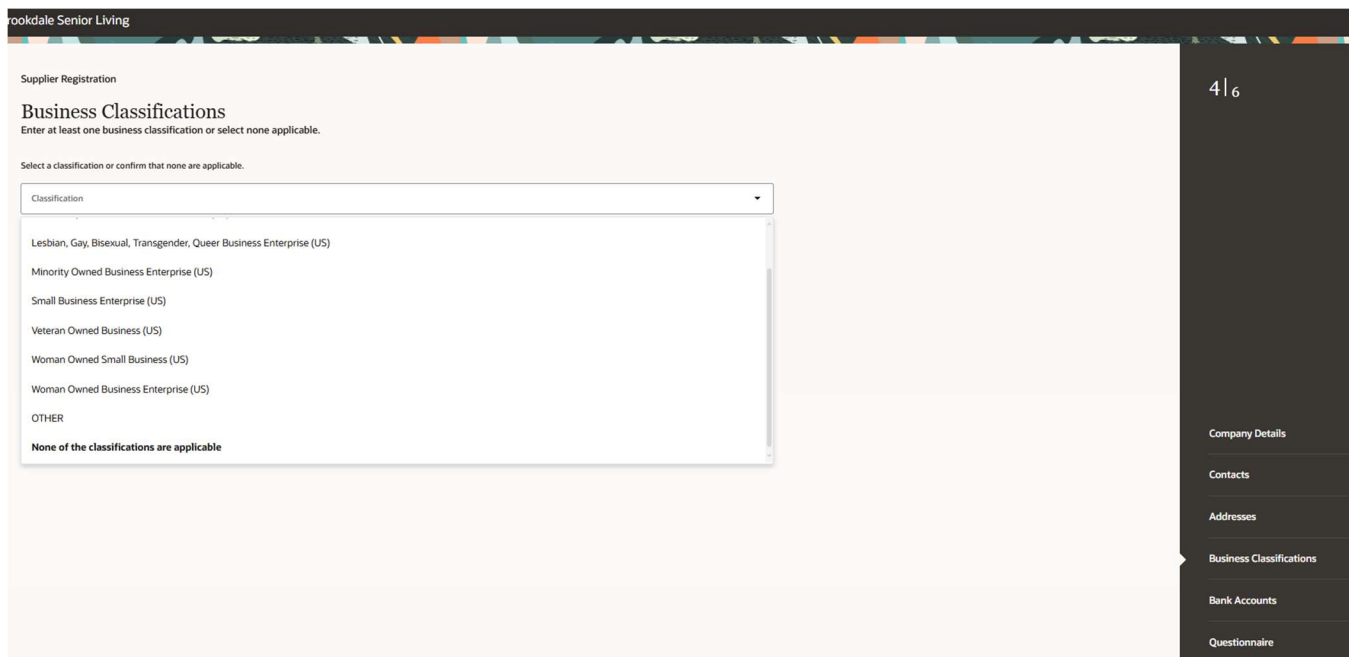
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- Complete the "Addresses" section. Add address name, select what this address is to be used for, enter address & check the box to identify which contact is associated with this address.



- When complete, click the "Continue" button
- 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."



- When complete, click the "Continue" button

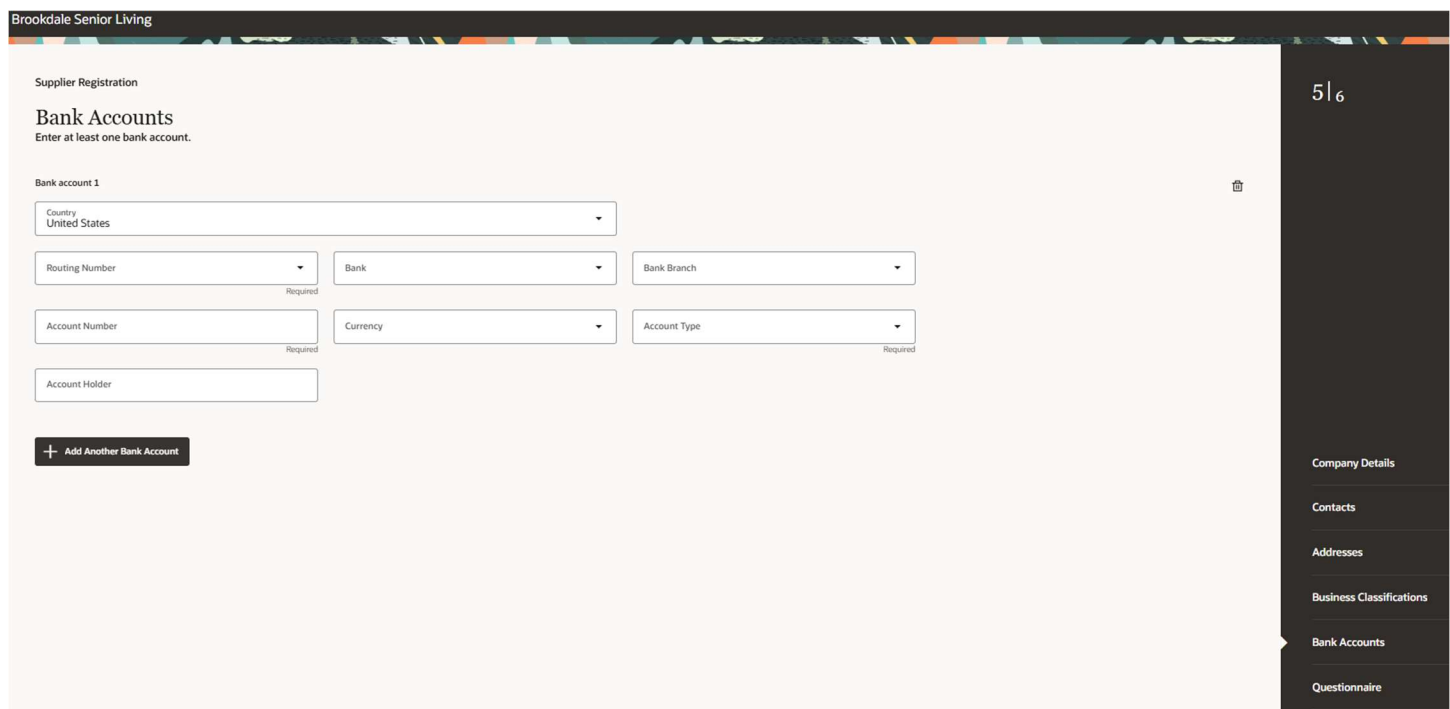
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13. Complete the Bank Account section.

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)



Brookdale Senior Living

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

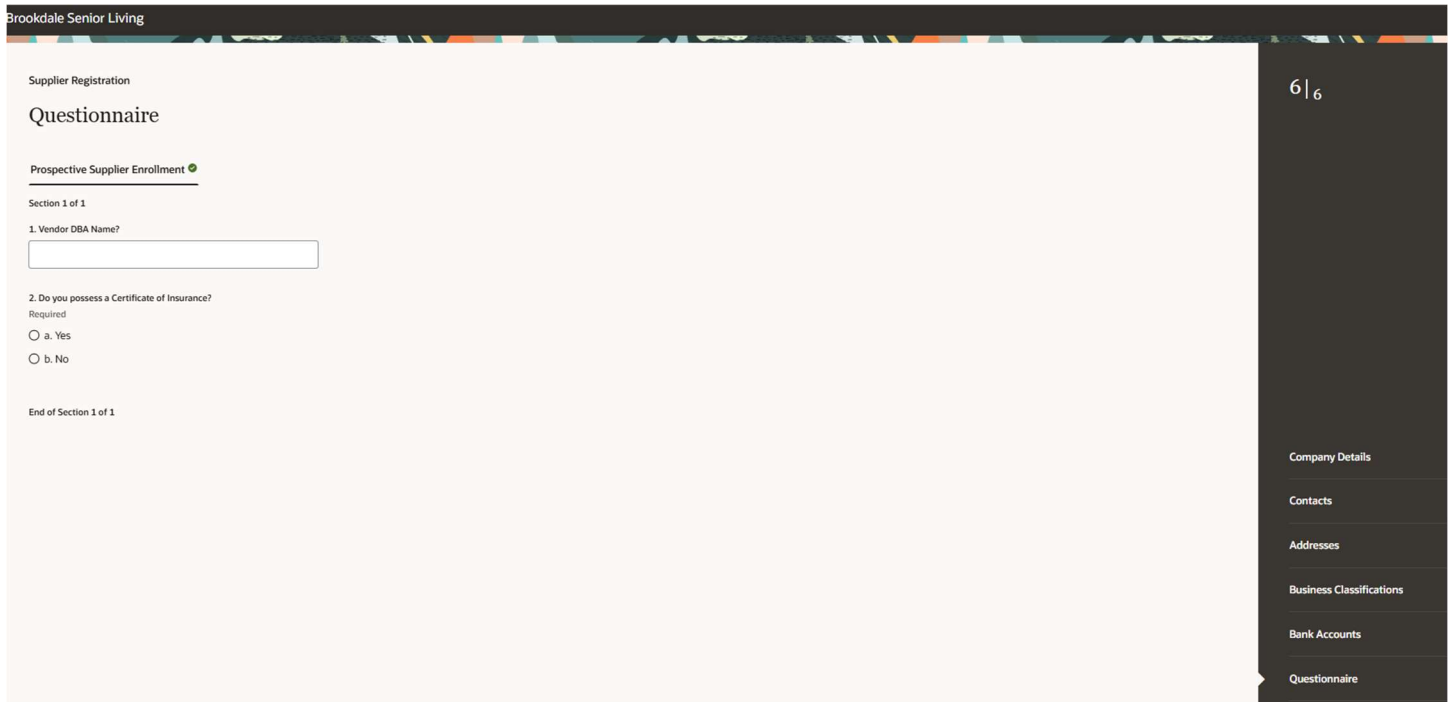
14. When complete, click the "Continue" button

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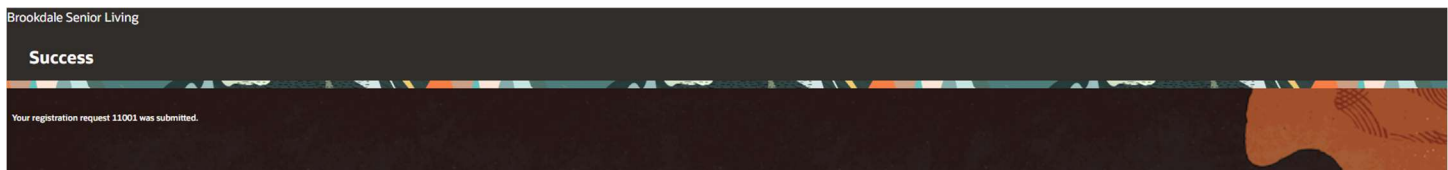
15. Complete all mandatory questions in the "Questionnaire" section.



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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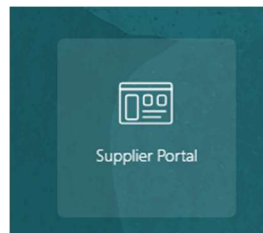
Supplier Invoice Submission

There are two methods of invoice submission:

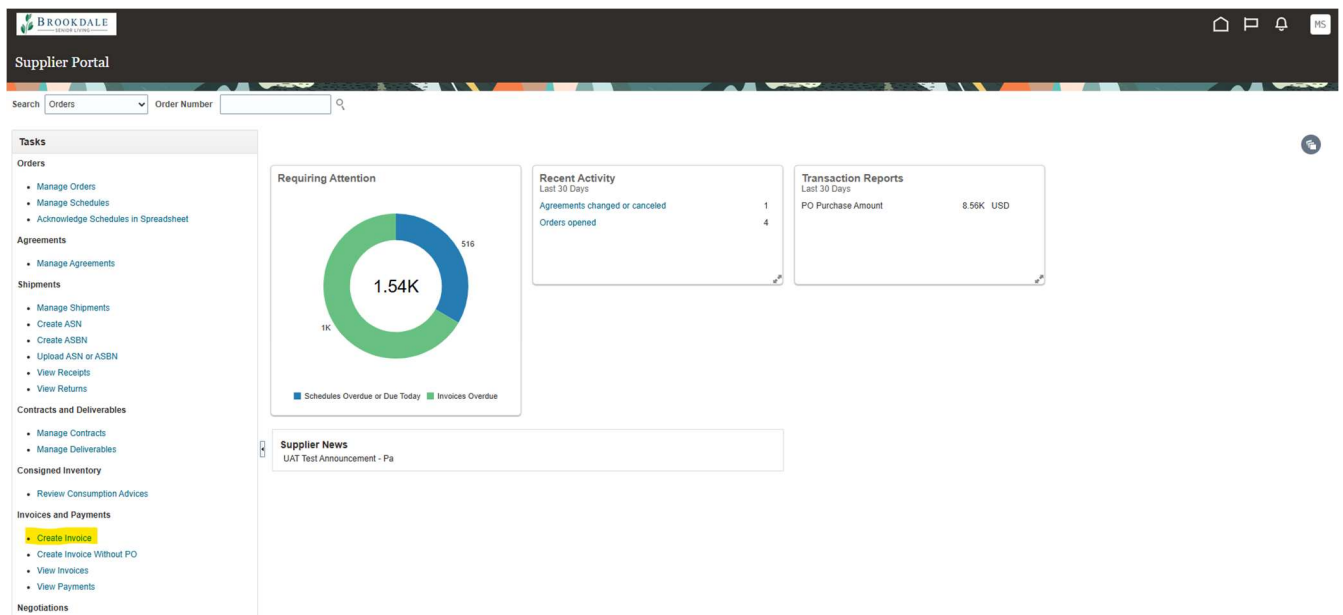
1. Invoice submitted against a Purchase Order
2. Invoice submitted without a Purchase Order

Submitting an Invoice against a Purchase Order

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

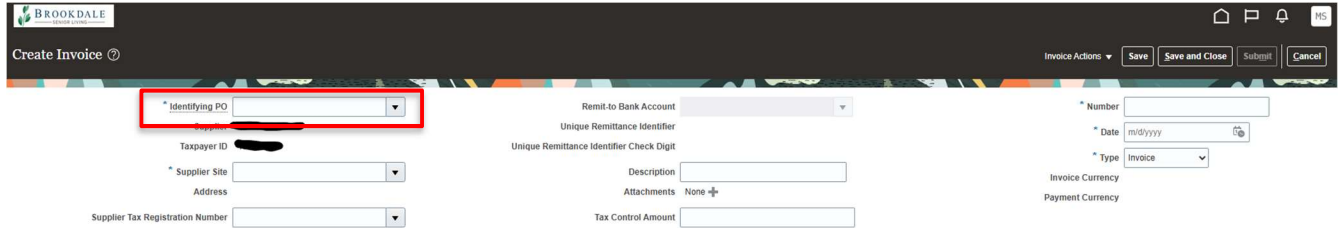


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- Enter "Identifying PO" details or select the drop down arrow & search for the PO number you want to invoice against. If you do not see the PO you are looking for, you can use the "Search" option at the bottom of the drop down box.



Create Invoice

Invoice Actions: Save, Save and Close, Submit, Cancel

* Identifying PO (highlighted with a red box)

Supplier

Taxpayer ID

* Supplier Site

Address

Supplier Tax Registration Number

Remit to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments: None

Tax Control Amount

* Number

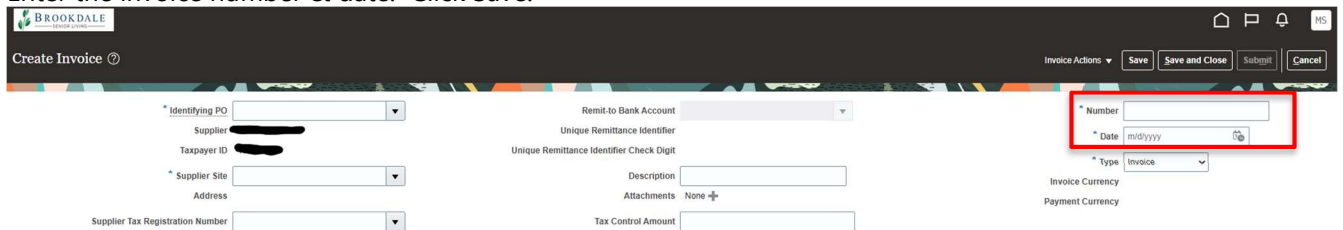
* Date: m/d/yyyy

* Type: Invoice

Invoice Currency

Payment Currency

- Enter the invoice number & date. Click Save.



Create Invoice

Invoice Actions: Save, Save and Close, Submit, Cancel

* Identifying PO

Supplier

Taxpayer ID

* Supplier Site

Address

Supplier Tax Registration Number

Remit to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

Attachments: None

Tax Control Amount

* Number (highlighted with a red box)

* Date: m/d/yyyy (highlighted with a red box)




* Type: Invoice

Invoice Currency

Payment Currency

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

Lines

View    Cancel Line

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

- 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: [icon] [icon] [icon] Select All

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



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

Lines

View   Cancel Line

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	Number	Line										
1	Freight												
Total													

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

Lines

View   Cancel Line

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	Number	Line										
4	Miscellaneous												

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.

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

Create Invoice 

Invoice Actions    

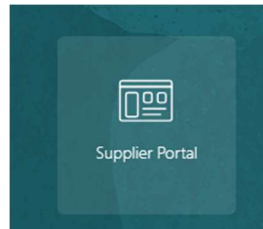
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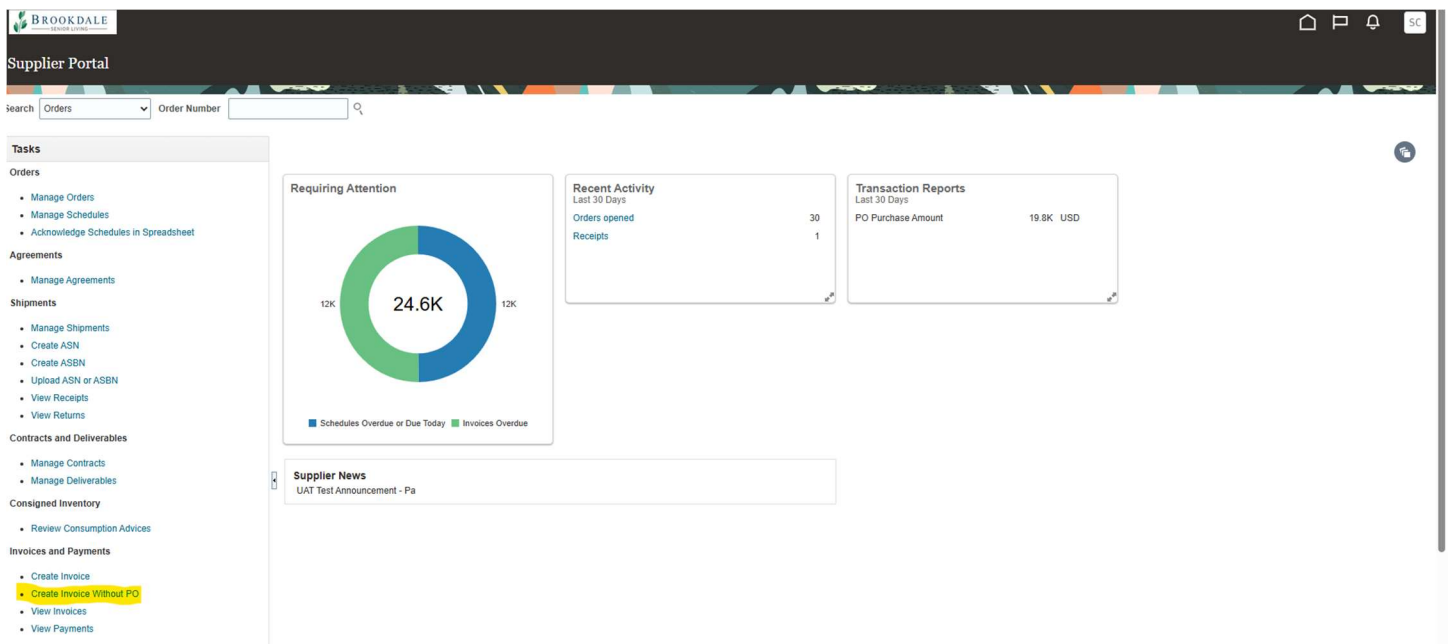
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Submitting an Invoice without a PO

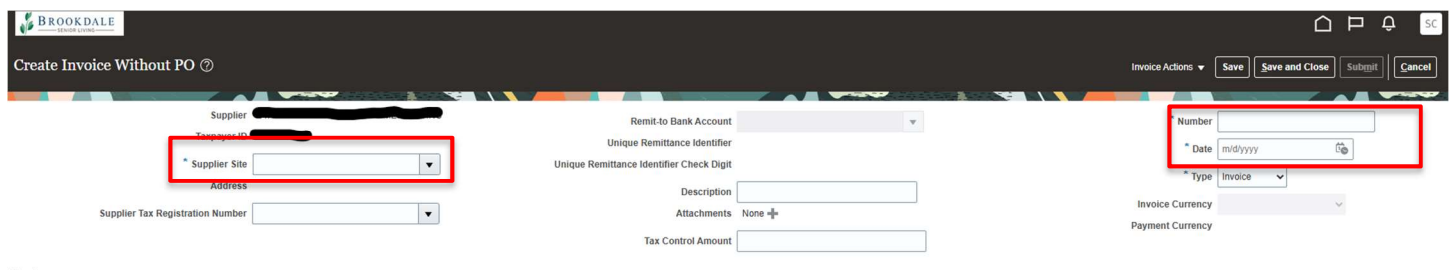
1. Log into Oracle & click on "Supplier Portal" tile.



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



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

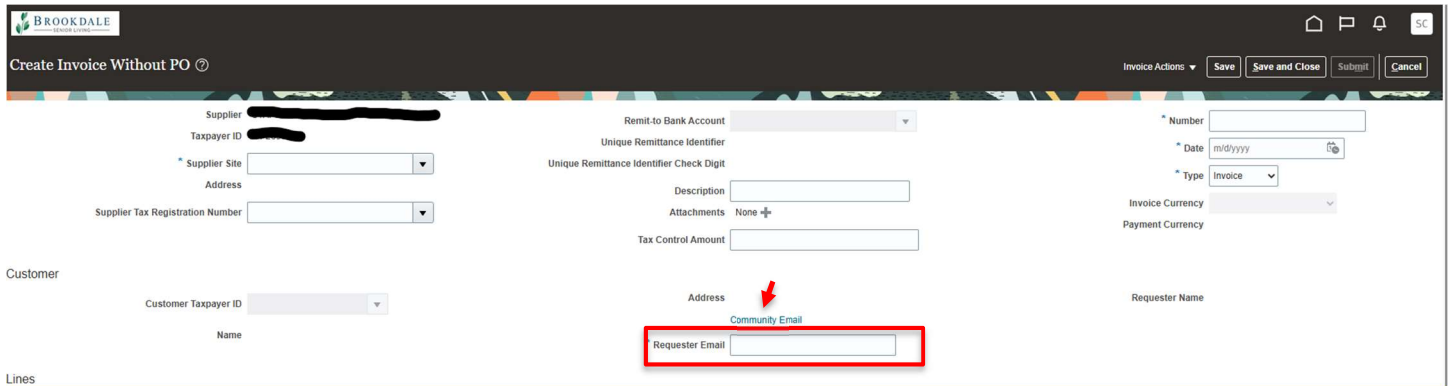


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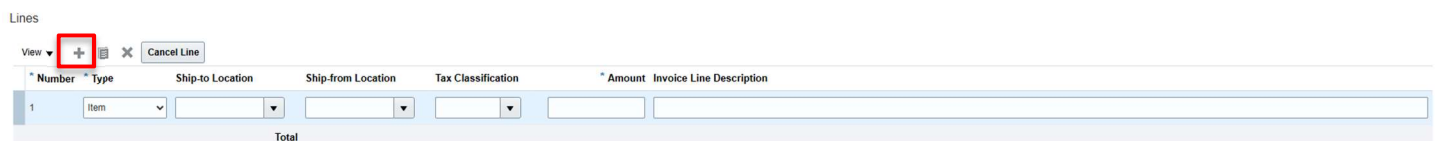
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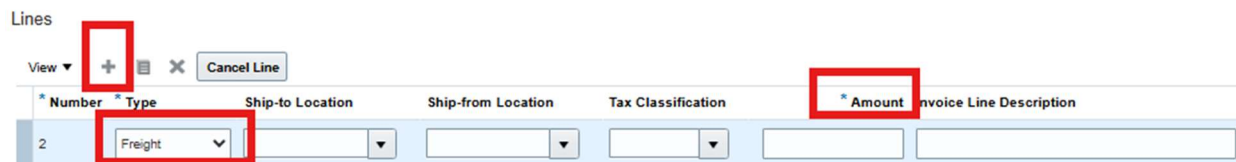
- In the "Customer" section, enter the Requestor Email. If you do not know the requestor email, click on the "Community Email" link & search for the email for the community you are invoicing.



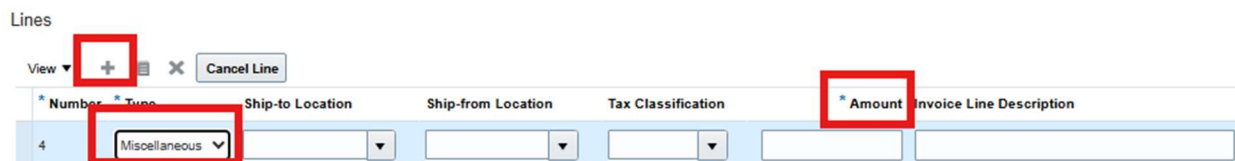
- Click the "+" icon to add line details. Enter the information below. Note: The "Ship-to Location" is the Brookdale community you are invoicing.



- 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."



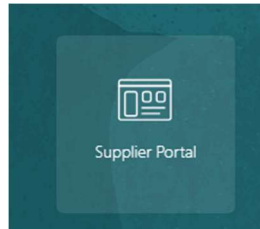
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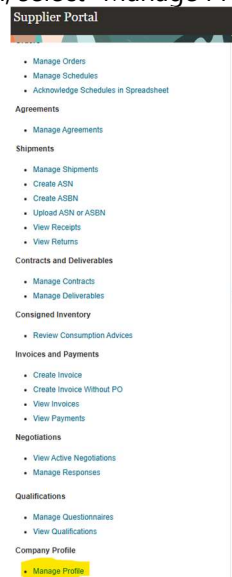
Supplier Information Updates

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



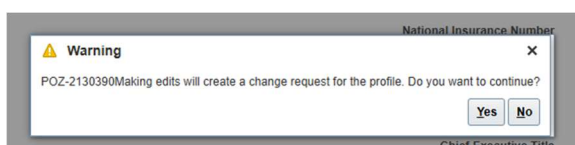
2. From the Task list on the left side of our screen, select "Manage Profile" under the "Company Profile" section.



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. Update the desired information in any of the profile sections. When complete, click "Save" & then "Review Changes".



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

