

Brookdale Supplier Help Guide: Oracle

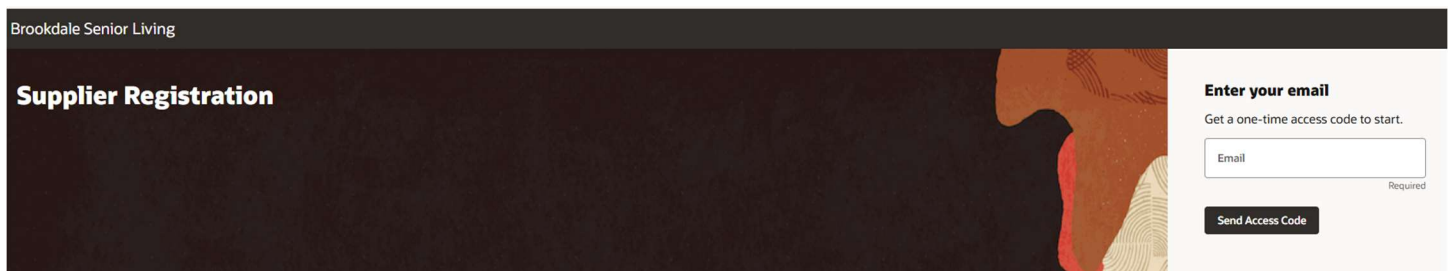
Quick Reference Guide

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

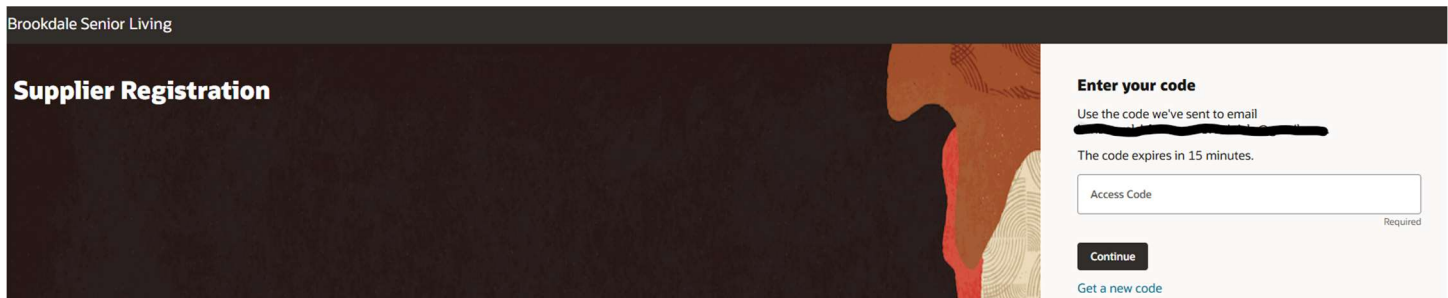
Enter your email
Get a one-time access code to start.

Email

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.

Access Code

Required

Continue

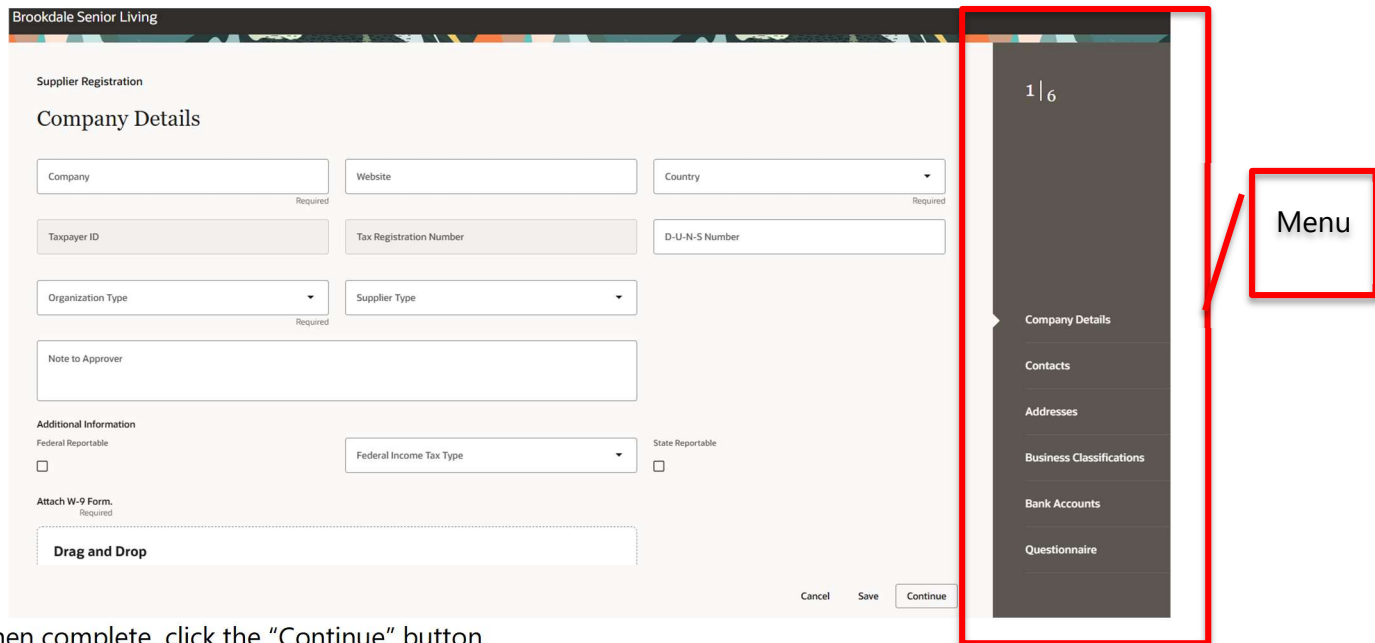
[Get a new code](#)

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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.**



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Supplier Registration

Company Details

Company Website Country

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

Organization Type 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

Menu

Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

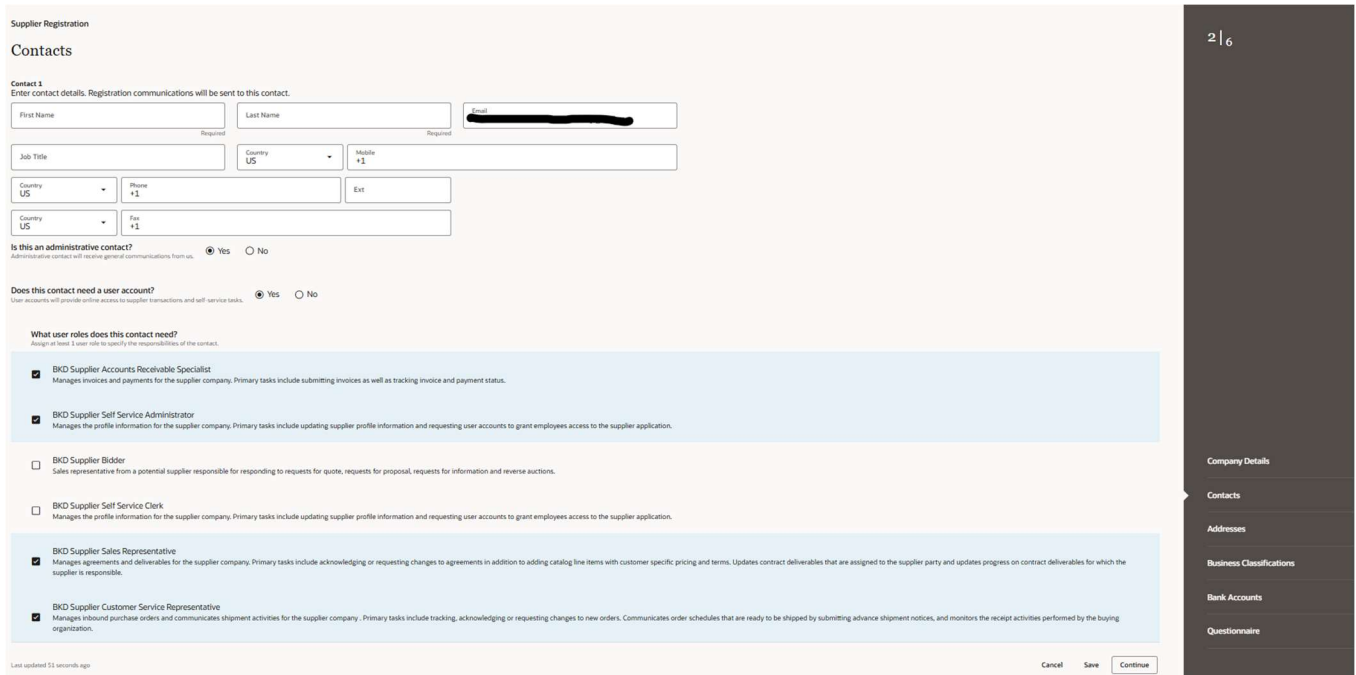
Questionnaire

- When complete, click the "Continue" button

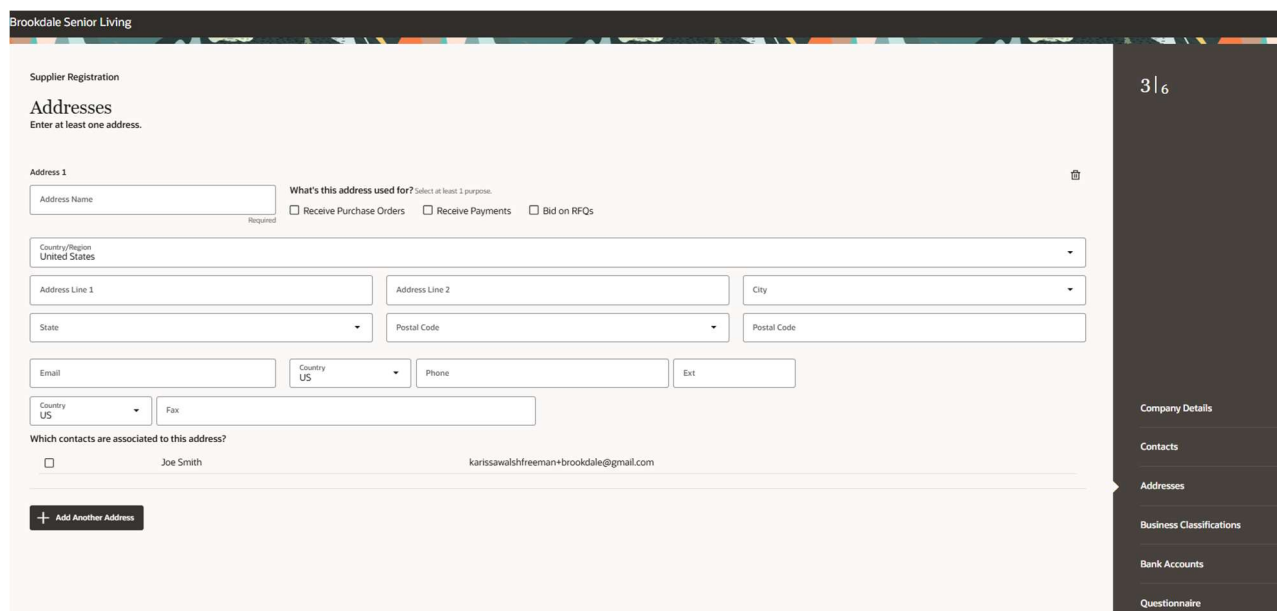
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- Complete the "Contacts" section. Note first & last name fields are required. You can add additional contacts by selecting the "Add Another Contact" button at bottom of page. At least one contact at your company should be a designated Administrative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



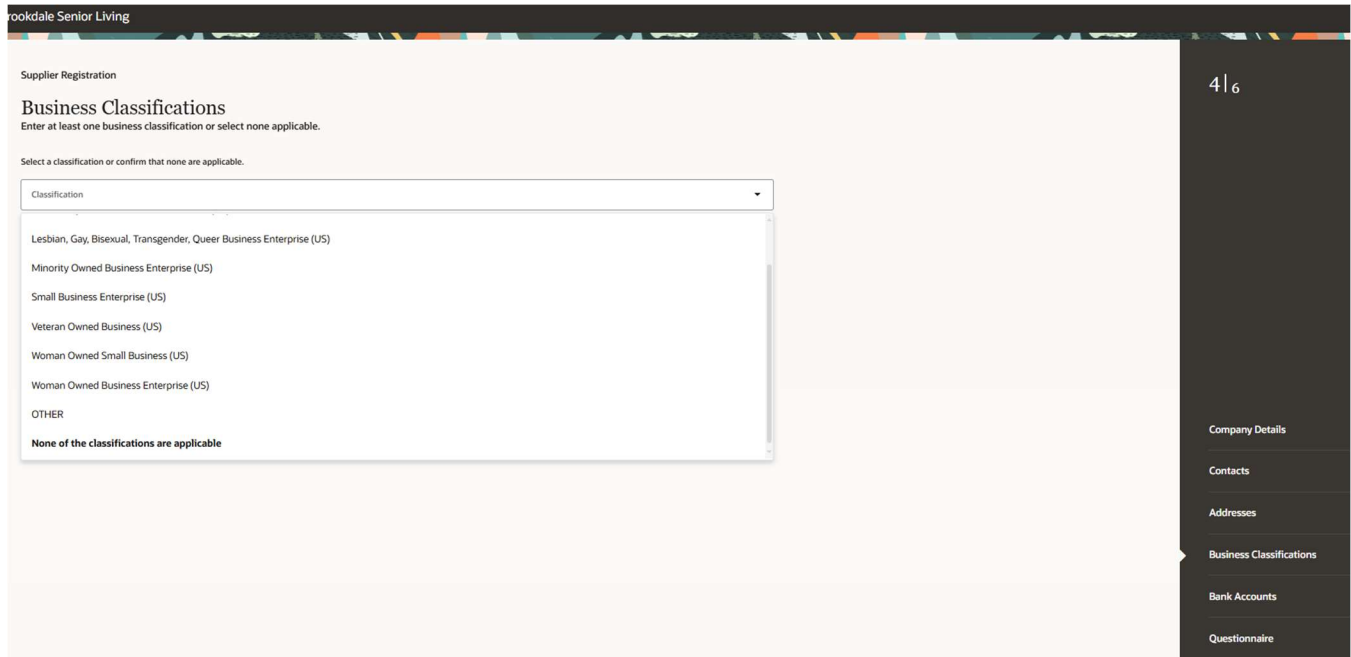
- Select "Continue" when finished entering all contact information.
- Complete the "Addresses" section. Add address name, select what this address is to be used for, enter address & check the box to identify which contact is associated with this address.



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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

4 | 6

Company Details

Contacts

Addresses

Business Classifications

Bank Accounts

Questionnaire

12. When complete, click the "Continue" button

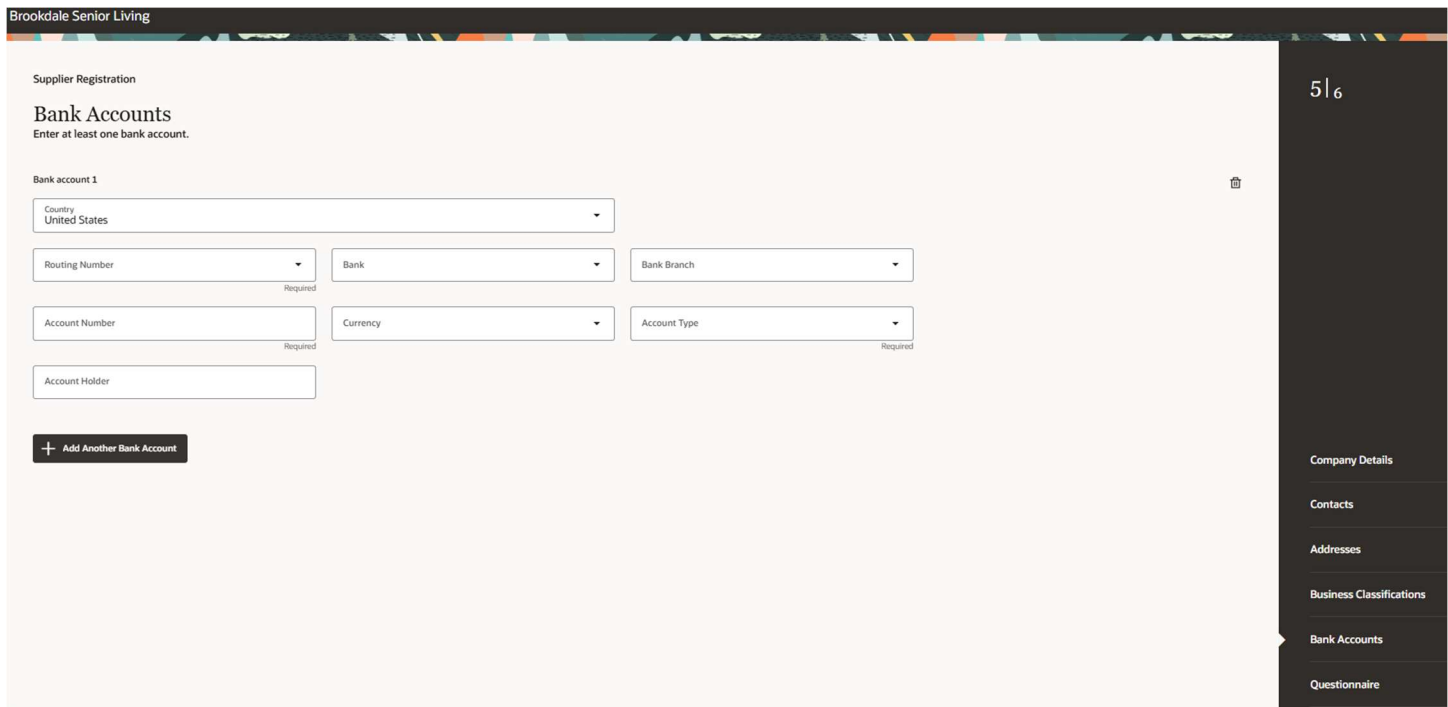
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13. Complete the Bank Account section.

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)

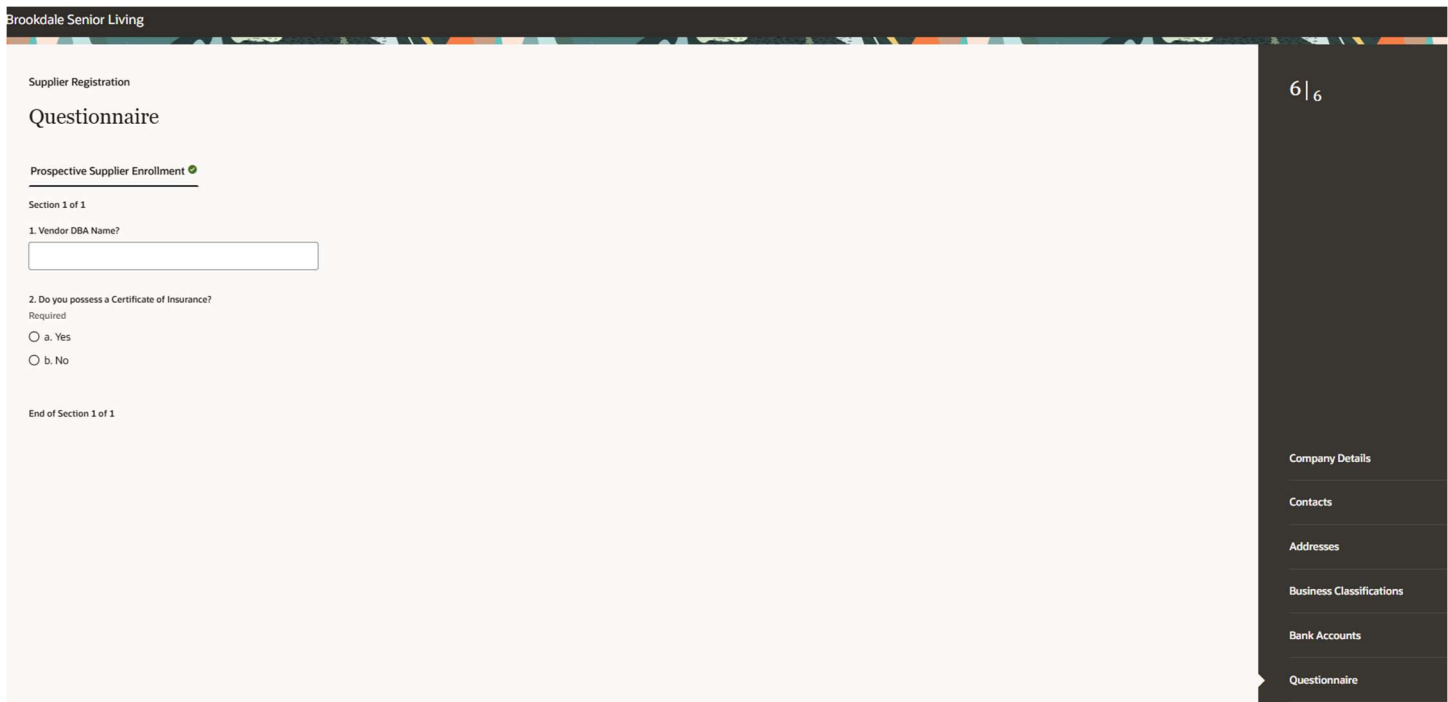


14. When complete, click the "Continue" button

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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

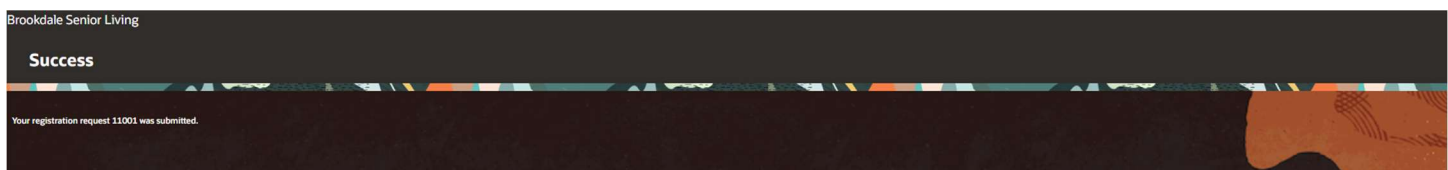
☐ b. No

End of Section 1 of 1

6 | 6

- 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.

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Supplier Invoice Submission

There are two methods of invoice submission:

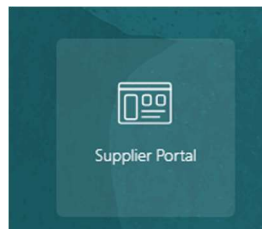
1. Invoice submitted against a Purchase Order – If you are typically issued PO's, you will use this method. You may not see the option to submit invoices without a PO.
2. Invoice submitted without a Purchase Order – If you are not issued PO's, you will use this method. Ex: Entertainers

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.

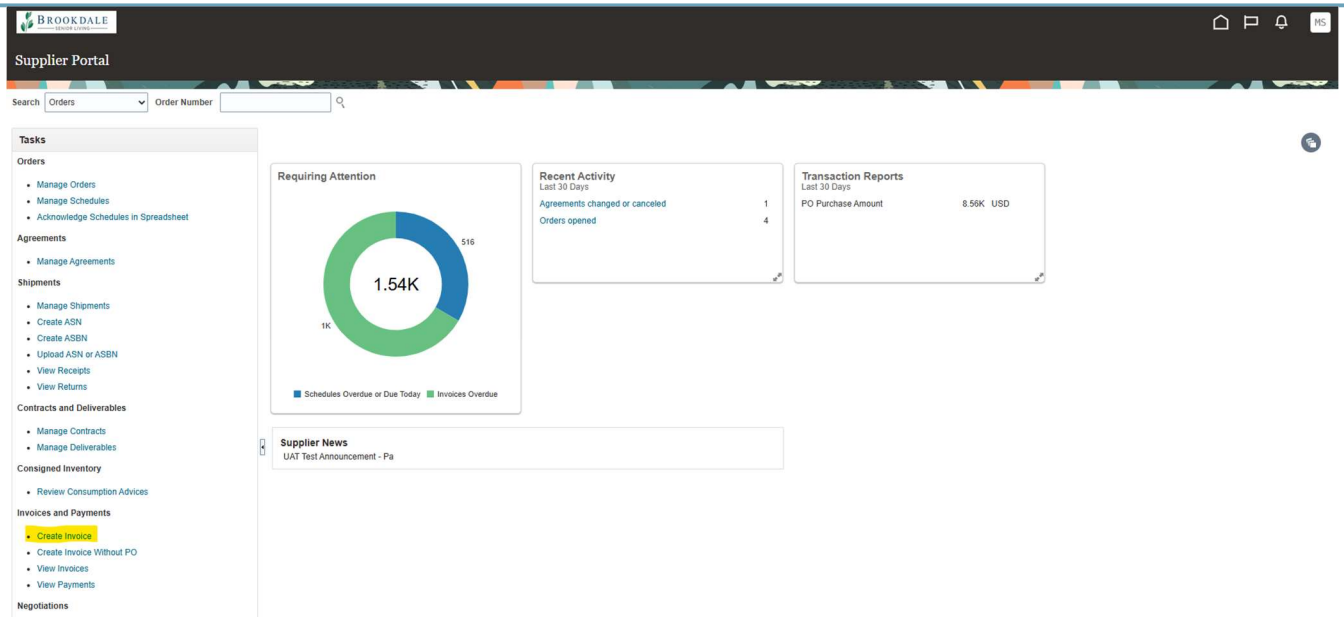


2. Click on "**Create Invoice**", which is located under the "Invoices and Payments section" on the left of screen

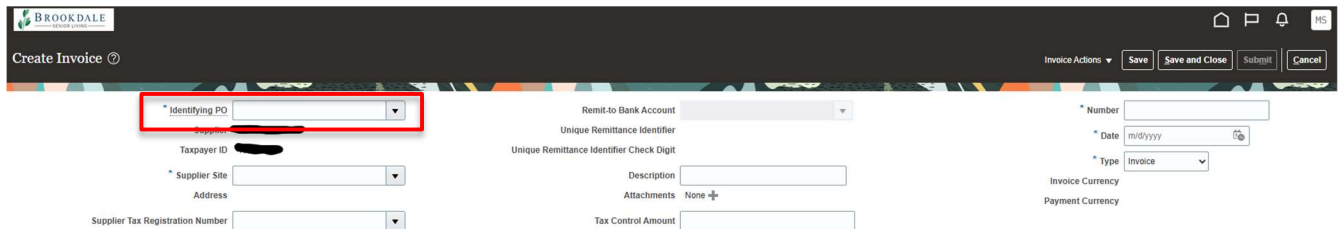
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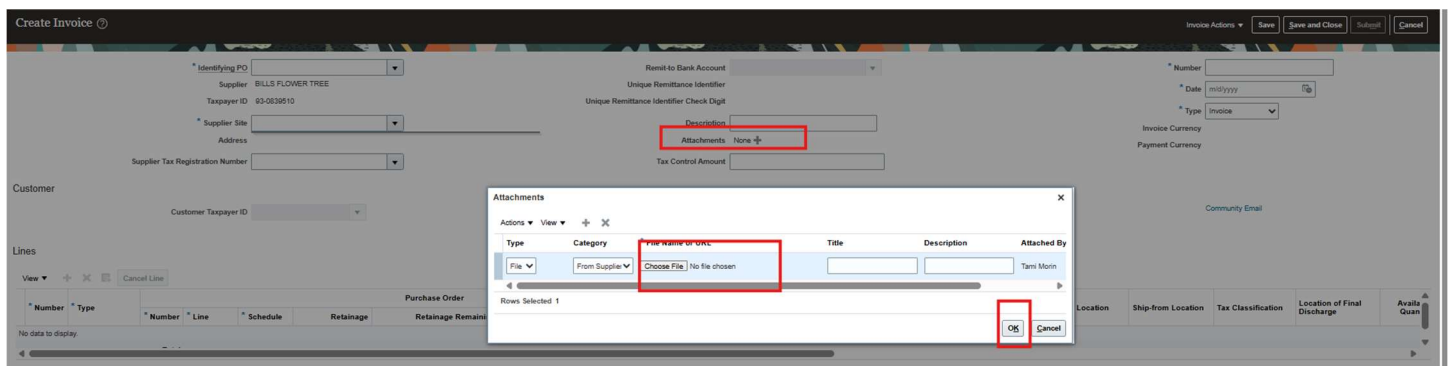
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- Enter "Identifying PO" details or select the drop down arrow & search for the PO number you want to invoice against. If you do not see the PO you are looking for, you can use the "Search" option at the bottom of the drop down box.



- Click on Attachments, then click on choose file, select the invoice copy and click ok. **Note: It is required to add an attachment to your invoice submission.**

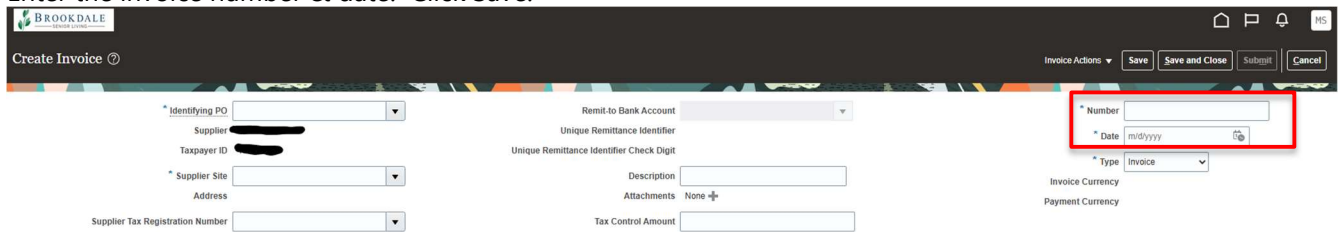


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5. Enter the invoice number & date. Click Save.



Create Invoice ⓘ

Invoice Actions: Save Save and Close Submit Cancel

* Identifying PO: [Dropdown]
 Supplier: [Redacted]
 Taxpayer ID: [Redacted]
 * Supplier Site: [Dropdown]
 Address: [Text]
 Supplier Tax Registration Number: [Dropdown]

Remit to Bank Account: [Dropdown]
 Unique Remittance Identifier: [Text]
 Unique Remittance Identifier Check Digit: [Text]
 Description: [Text]
 Attachments: None ⓘ
 Tax Control Amount: [Text]

* Number: [Text]
 * Date: m/d/yyyy ⓘ
 * Type: Invoice
 Invoice Currency: [Text]
 Payment Currency: [Text]

6. 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
		* Number * Line * Schedule	Number Line									
No data to display												
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 [Dropdown]

** Purchase Order: 353
 ** Creation Date: m/d/yyyy h:mm a ⓘ

** Consumption Advice: [Text]

Search Reset Save...

Search Results

View ⓘ + Detach Select All

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

Apply OK Cancel

Note: For a monthly service agreement, only invoice for the amount you are billing for. After selecting the desired line, on the next screen, change the dollar amount under "Amount"

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

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													

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

Lines

View   Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Number	Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
2	Tax															

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.

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

Create Invoice ⓘ

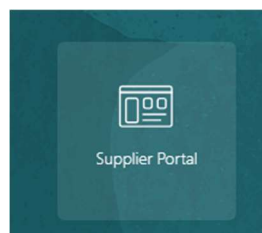
Invoice Actions    

Submitting an Invoice without a PO

IMPORTANT

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

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

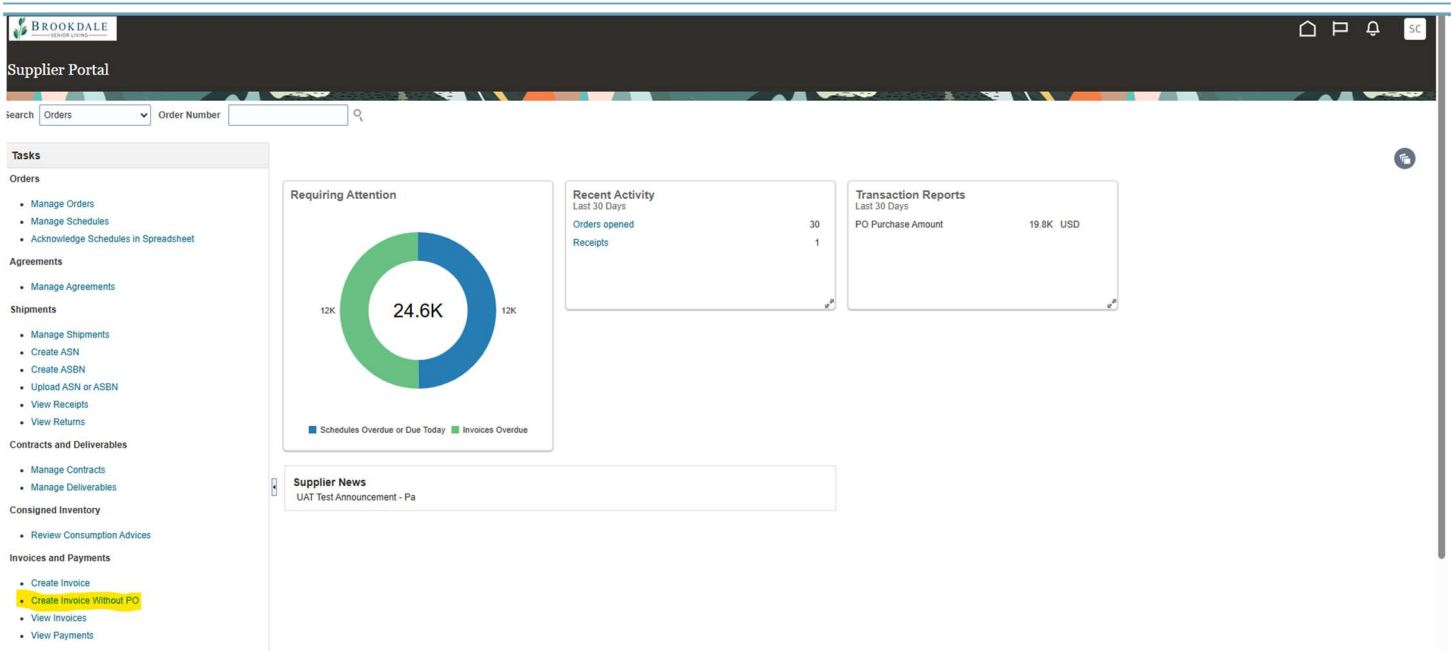


2. Click on **"Create Invoice Without PO"**, which is located under the "Invoices and Payments section" on the left of screen

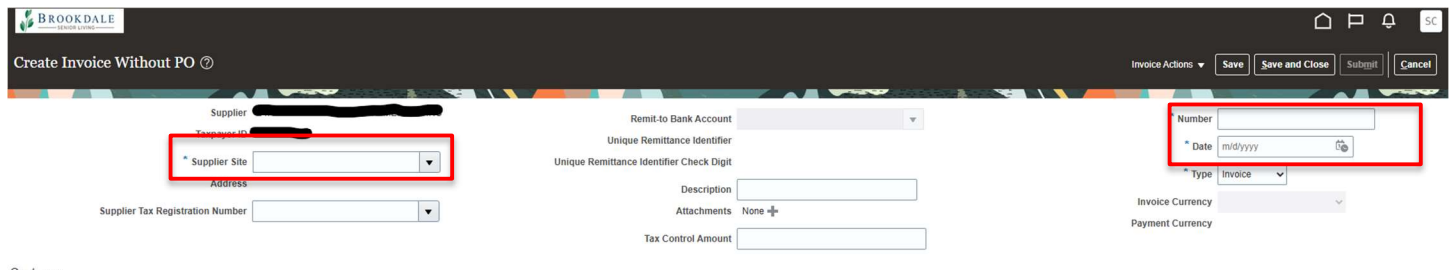
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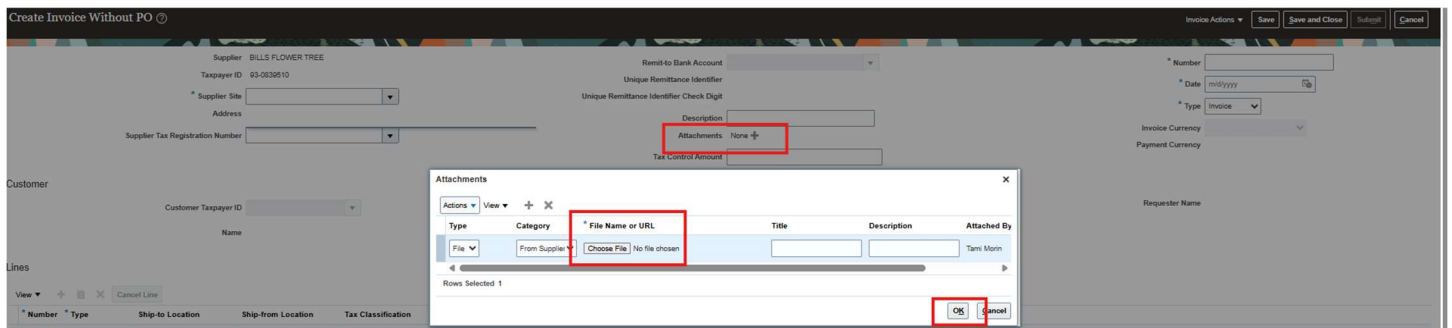
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- Enter invoice number & date. Select the "supplier site" from the drop down. This is your location (not the Brookdale community you are invoicing).



- Click on Attachments, then click on choose file, select the invoice copy and click ok. **Note: It is required to add an attachment to your invoice submission.**

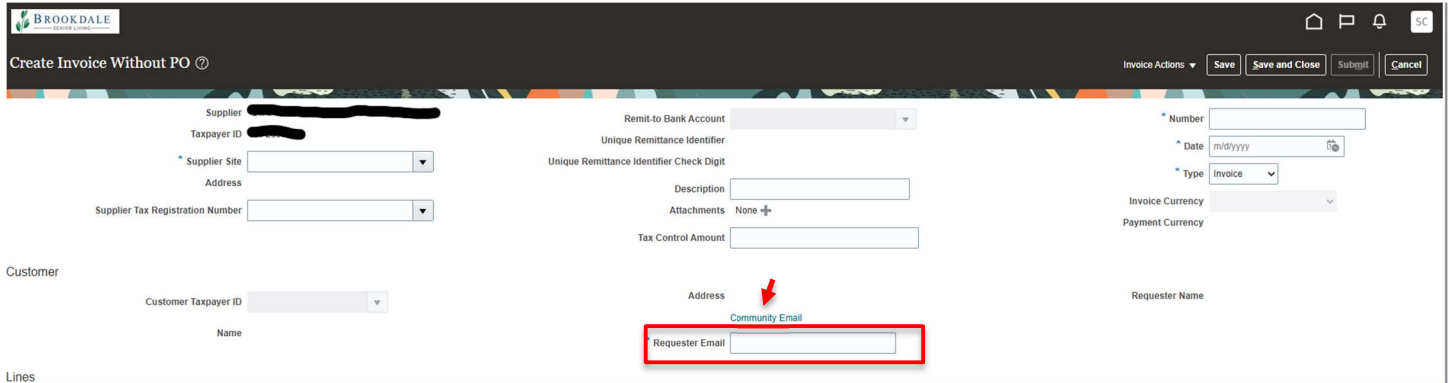


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- In the "Customer" section, enter the Requestor Email. This is the email for your contact at the community you are invoicing. If you do not know the requestor email, click on the "Community Email" link & search for the email for the community you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



Supplier [REDACTED]
 Taxpayer ID [REDACTED]
 Supplier Site [REDACTED]
 Address [REDACTED]
 Supplier Tax Registration Number [REDACTED]

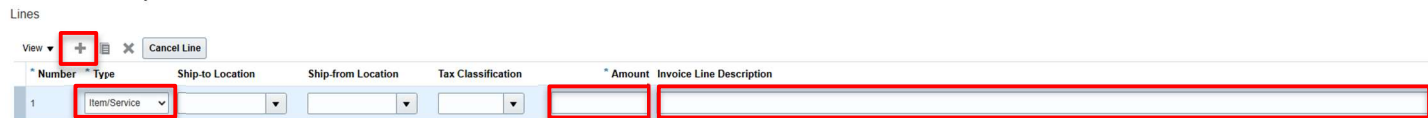
Remit to Bank Account [REDACTED]
 Unique Remittance Identifier [REDACTED]
 Unique Remittance Identifier Check Digit [REDACTED]
 Description [REDACTED]
 Attachments None
 Tax Control Amount [REDACTED]

Customer
 Customer Taxpayer ID [REDACTED]
 Name [REDACTED]
 Address [REDACTED]
 Requester Name [REDACTED]
 Requestor Email [REDACTED] (Community Email)

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

Number [REDACTED]
 Date m/d/yyyy
 Type Invoice
 Invoice Currency [REDACTED]
 Payment Currency [REDACTED]

- Click the "+" icon to add line details. Enter the information below. Note: The "Ship-to Location" is the Brookdale community you are invoicing. The Ship-to Location, Ship-from-Location, & tax classification are not required fields.

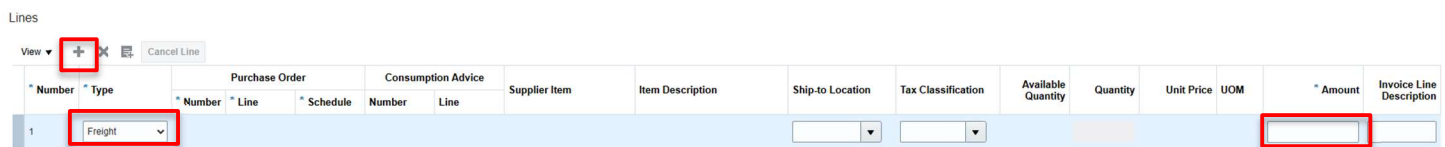


Lines

View + - Cancel Line

* Number	* Type	Ship-to Location	Ship-from Location	Tax Classification	* Amount	Invoice Line Description
1	Item/Service					

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

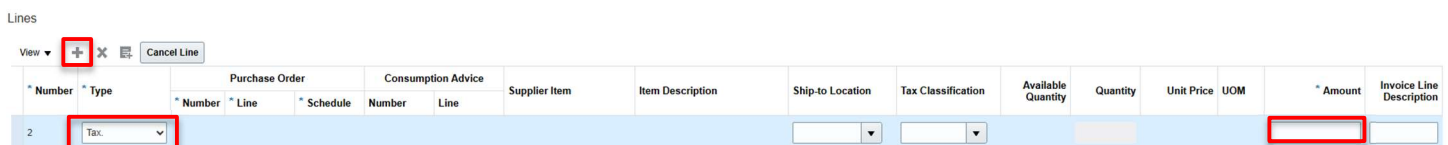


Lines

View + - Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Number	Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
1	Freight															

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



Lines

View + - Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Number	Line	Supplier Item	Item Description	Ship-to Location	Tax Classification	Available Quantity	Quantity	Unit Price	UOM	* Amount	Invoice Line Description
2	Tax															

Note: Optional fields, Ship to location (the Brookdale community you are invoicing), & tax classification 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.

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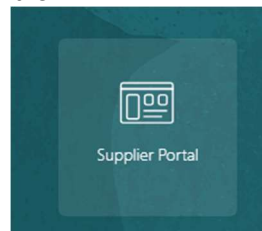
- When you have entered all your invoice information, click the "Save" button & then "Submit."



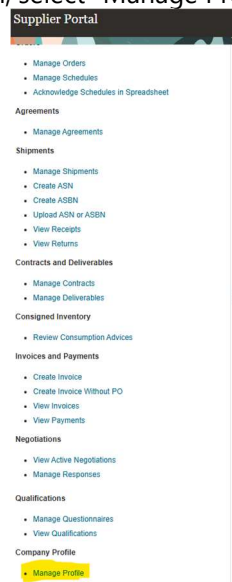
Supplier Information Updates

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

- Log into Oracle & select the "Supplier Portal" tile



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



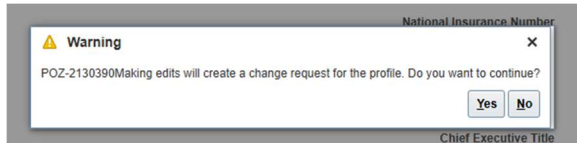
- Select "Edit."



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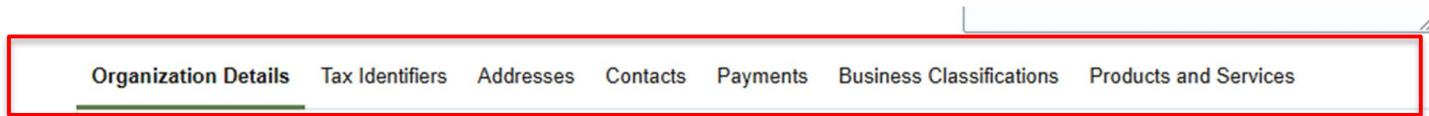
4. Click "Yes" when the pop up appears:



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

Phone

* First Name

Middle Name

* Last Name

Job Title

Mobile

Fax

Email

Status

Active

☐ Administrative contact

Contact Addresses

Actions

View

Format

Remove

Select and Add

Columns Hidden: 5

×

Freeze

Detach

Wrap

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

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- 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."

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

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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.