Meritor
iSupplier Portal
User Instruction Manual
Table of Contents

1. Introduction ....................................................................................1
2. Getting Started ..............................................................................2
3. Reviewing Notifications ..............................................................3
4. Acknowledging a Purchase Order ...............................................5
5. Printing a Purchase Order (North America region only) .............7
6. Viewing and Exporting Supplier Schedules ...............................8
7. Creating Advanced Shipment Notices .......................................9
8. Viewing Vendors POC Inventory and Usage .............................12
9. Reviewing Invoices .......................................................................13
10. Reviewing Payments ....................................................................17
11. Changing User Preferences ........................................................21
12. Important Information ...............................................................21

Note: It is recommended that you login every 90 days, as your account will be deactivated if not used within one year.
1. Introduction

The iSupplier Portal is an internet based web portal that provides Meritor’s Supplier’s with real-time visibility to the Oracle Production environment, wherein Purchase Orders, Releases, Receipts Schedules, Invoices and Payments can be viewed. Additionally, the portal provides interactive capabilities allowing suppliers to create Advanced Shipment Notices (ASNs) and download supplier schedules.

The iSupplier Portal embodies a “zero-training” paradigm, wherein navigation and use of this type of model is self-explanatory. The portal has an enhanced user interface, which allows first time, untrained users to easily access information. In applying this theory, the portal is laid out in such a way as to offer immediate access to all purchase-to-pay processes directly from the home page.

Meritor will register suppliers to use the portal. The supplier will receive an e-mail from ‘Workflow Mailer’ containing a link to the portal, along with their user ID and password. After logging in for the first time, you will be asked to change your password. Make sure the new password is a combination of letters and numbers, at least 6 characters long and does not contain repeating characters. Passwords cannot be re-used within a 365-day period and cannot be the same as the user ID.

Although navigation and use of the iSupplier portal is designed to be self-explanatory, questions may arise. If so, please contact your Meritor representative – a planner at one of the manufacturing facilities, or a buyer at the World Headquarters.
2. Getting Started

The iSupplier Home Page is laid out to help you find the information you need quickly and easily. A good way to start is by using the tabs along the upper right hand section of the home page. Under each tabbed region are additional functions, which correspond to the links located on the right hand side of the home page.

You can click on the “Orders” tab to see Purchase Orders and Releases. Click on the “Planning” tab to see Supplier Schedules, and click on the “Product” tab to see POC Inventory/Usage data. To create ASN’s, click on the “Advanced Shipment Notices” hyperlink located on the “Home” tab.

On the upper left side of the home page you will find the quick search box. A drop-down list allows the portal to be searched for specific information such as Purchase Order, Shipment, Invoice or Payment number. To do a quick search for such information, select the appropriate option from the drop-down list, enter the number and click the “Go” button.

iSupplier Home Page
3. Reviewing Notifications

Notifications are informative messages sent to Suppliers to let them know when new purchase orders, purchase order change notices, or releases have been issued, and what action may be required on their part. Notices will also be sent when a password has been reset. A summary of notifications will appear on the home page. To see a complete list of notifications, click on the “Full List” button found just above the notifications section.

Purchase Order numbers such as T00053431 or 3452 will identify the purchase orders. A purchase order release is signified by a dash at the end of the purchase order number followed by another number – which is the actual release number. For example, T00053431-4 signifies this is the fourth release against the purchase order T00053431.

Notifications will include additional information. By clicking on the notification subject hyperlink, you are directed to the Notification Detail page (shown on the next page) where you can accept/acknowledge the order.
NOTE: The “Reassign” function is not available at this time. Notifications are sent/assigned to all registered users.
4. Acknowledging a Purchase Order

- Click on the Orders Tab.

- Under View, select Purchase Orders to Acknowledge from the drop-down list, then click “Go”. This will filter your list of PO’s by those that require acknowledgment. (You may opt to keep the default list format which displays your latest 25 orders.)

![Image of the iSupplier Portal where Purchase Orders are acknowledged](image)

**NOTE:** Basic information about the PO will be displayed in this view. This information can be exported to excel as needed by clicking the Export button at the bottom right-hand corner of the screen.

- Select the PO you would like to view/acknowledge by clicking on the PO number. You will be routed to a page where you can view the PO header and line item detail.

- After reviewing the PO, click on the “Acknowledge” button (shown below).
You will be routed to another Acknowledgment screen used to acknowledge the receipt of the entire order.

**Note:** Contact your buyer if there are any discrepancy issues regarding the PO **AFTER** you accept and print the receipt.

- Click “Accept Entire Order”

- Click “Submit”. When you select submit, this will store your acknowledgment and update the status of the PO to “accepted” in the portal.

**NOTE:** Making/submitting changes to or rejecting the PO will cause the PO to be suspended in the system. If the order is not correct, accept and print the order and discuss the issue with your buyer. The View Change History function is also not available at this time.
5. Printing a Purchase Order *(North America region only)*

- Review the order details, notes, status and attachments; then select “Print PO”.

Purchase Order Detail

- The printable version of the purchase order will display in a (*.pdf) window where it can be printed.
6. Viewing and Exporting Supplier Schedules

- Click on the “Planning” tab and query the schedule number using the current date in the format YYYYMMDD [20100430%], followed by a percent sign [%], which is the wildcard symbol used in Oracle, then click “Go”. Schedules will be displayed per ARM facility. Click the Summarized View icon to see the schedule.

- The summarized view appears on the below screen. Click the “Export” button to download in Excel format.
7. Creating Advanced Shipment Notices

- Click on Advanced Shipment Notices hyperlink on the Home page.
- Then select “Create Advanced Shipment Notices”.

**NOTE:** The “View/Cancel Advanced Shipment and Billing Notices” link allows you to cancel incorrect or erroneous ASNs.

- Click the “Advanced Search” button to query by part number, PO, ship to location, etc.
• Query by part number or ship to location and then click “Go”.
• Place a check mark next to the shipment line and click ‘Add to Shipment Notice’.

• Adjust Quantity Shipped, if necessary.
• Click the “Add Shipments” button to add part numbers or additional lines to shipment, repeat process as necessary.
• Select “Shipment Header”, as shown below.
• Enter required information and either click the ‘Submit’ button to finish, or ‘Preview’ to view the ASN prior to submission.

**NOTE:** Required fields are noted by an asterisk (*) next to the field.
8. Viewing Vendors Pay on Consumption (POC) Inventory and Usage

- POC Vendors can access their current On-Hand, Consumption Advices and Transaction Data through the ‘Product’ tab in the iSupplier portal. Click the ‘Consigned Inventory’ link. Query by item or leave blank and click ‘Go’ to query all items.

- After selecting Consumption Advice for an item, you can find the quantities and dates of consumption. These dates can then be queried from the ‘Account’ tab to find the corresponding invoice information.
9. Reviewing Invoices

The following process details the steps utilized to view invoices via the Meritor iSupplier portal. Invoices can be reviewed from the “Account” tab.

Complete the following steps:

**Step 1:**
To minimize the search results, enter any of the following pieces of information and then click the “Go” button:

- **Invoice Number**
- **Invoice Creation Date**
- **PO Number**
- **Payment Number**
- **Payment Status (Not Paid, Partially Paid, Paid)**

**NOTE:** To search for all invoices click the “Go” button with no filtered data in the aforementioned fields.

The “%” (wildcard) character can be substituted for any of a defined subset of all possible characters. For example: entering “%1234” in the invoice number field will return all invoices ending with the characters “1234”.
Step 2:
The ‘Search Invoice Summary’ screen will now appear.

In the Invoice Summary Results window, the following will be displayed for each invoice listed:

- Invoice Number
- Description of the Invoice (Typically, includes User Comments)
- Invoice Date
- PO Number/Release
- Currency
- Gross Amount
- Amount Due
- Due Date
- On Hold Status - If on Hold (North America Only)
- Payment Number
- Discount Date (If Applicable)
- Available Discount (If Applicable)
- Packing Slip Number
- Type

**NOTE:** Only 25 invoices at a time are displayed, to show the next set of 25 click the Next 25 link at the top right of the Invoice Summary Result window.
To find out whether an invoice is on-hold or unpaid, search by payment status of “not paid” and click the “Go” button to return the following results.
Step 3 (North America region only):
To view invoices on hold, enter search criteria and select the Documentum Hold Invoices button as indicated below:

The Documentum Hold Invoices will appear on the screen as indicated below and will detail the "On Hold Status":

North America Region Only
Step 4 (North America region only):

To view the following invoice detail in an Excel file, enter search criteria and click ‘Go’:

- Quantity Invoiced
- Unit Price
- Invoice Amount
- Item Number
- Packing Slip Number

From the Invoice Summary screen, select Export Details:

North America Region Only
10. Reviewing Payments

Payments can be reviewed from the Account tab → View Payments region.

Complete the following steps:

**Step 1:**
To minimize the search results, enter any of the following pieces of information, if known, then click “Go”:
- Payment Number
- Payment Date
- PO Number
- Packing Slip

**NOTE:** To search for all payments click the “Go” button with no filtered data.

The % (wildcard) character can be substituted for any of a defined subset of all possible characters. For example: entering “%1234” in the payment number field will return all payments ending with the characters “1234”.
Step 2:
The ‘Payment Summary Result’ screen will appear:

In the Payment Summary Results window, the following will be displayed for each payment:

- Payment Number
- Invoice Numbers included in the Payment
- PO Numbers/Releases Included in the Payment
- Payment Date
- Currency
- Amount
- If Payment was Stopped
- If Payment was Cleared
- If Payment was Voided
- Supplier Remit-to City
- Supplier Address

**NOTE:** Only 25 payments at a time are displayed, to show the next set of 25 click the Next 25 link at the top right of the Payment Summary Result window.
Step 3 (North America region only):

To view the following invoice detail in an excel file, enter search criteria, then click “Go”:

- Quantity Invoiced
- Unit Price
- Invoice Amount
- Item Number
- Packing Slip Number

From the Payment Summary Screen, select Export Details:
Step 4:
Should you require more detailed information on a specific payment, you are able to conduct more research on the payment specifics and the invoice specifics by clicking on the link associated with the payment.

Typically, vendors of Meritor conduct additional research on payment details therefore an example of this is included below:

**Example of Payment Research:**

In the payment summary results window, clicking on the payment number link for the first payment will display the following detailed information:

![Payment Summary Results](image)

*Note: Detailed information was intentionally removed from this slide. Should you conduct detailed payment research on your payments, you would see the information associated for your specific payment.*
11. Changing User Preferences

The User Preferences area of iSupplier can be found by clicking the “Preferences” link in the top right corner of the iSupplier home page.

Change Password – To change your password, type your existing password in the Old Password box. Then type your new password in the New Password box, and again in the Repeat Password box. Click the Apply button. A message at the top of the page will either inform you of errors in your new password, or will confirm that your new password has been set.

Notifications – Generally we use the two notification options below:

- **Do not send me mail** – Do not receive e-mails.
- **HTML mail with attachments (Default)** – Receive iSupplier notifications via email including attachments.

**Note**: You can not choose to turn off just certain notifications – this is an ‘all or nothing’ option. You can either choose to receive all notifications, or you can choose to receive none.

12. Important Information

Banking Changes – Please be sure to inform us immediately via email if your banking has been changed and we will work with you to ensure a smooth transition. This information can be emailed to VendorMaintenance@Meritor.com.

Payment Details – We understand that questions may arise regarding your account. For support, please log onto the following website: www.meritoraphd.com and follow the instructions.

Add PO or AR Contacts – If you would like to change and/or add additional names for access into the iSupplier portal, send an email to the following address:

- PO contacts, please email iSupplierECNPO@Meritor.com
- AR contacts, please email VendorMaintenance@Meritor.com.
## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Revision Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2/11/11</td>
<td>P2P Team</td>
<td>Initial Creation</td>
</tr>
<tr>
<td>2</td>
<td>4/6/11</td>
<td>P2P Team</td>
<td>Revised to update name from ArvinMeritor to Meritor</td>
</tr>
</tbody>
</table>