ARLINGTON
VIRGINIA

iSUPPLIER PORTAL TRAINING

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CHAPTER 1: Introduction

Chapter Objectives:

- Understand how you can use iSupplier Portal to manage your business transactions with Arlington County

Chapter Tasks:

- Learn how to log in to iSupplier Portal
- Learn how to navigate and search within the application

Estimated Lesson Time: 10 minutes

Oracle iSupplier Portal enables web-based communication between Arlington County and its suppliers. As a supplier using Oracle iSupplier Portal, you can:

- view purchase orders
- view receipts
- view invoices
- view payments
- view notifications
- update contacts
- update addresses
- update bank accounts
- update business classifications

Lesson 1-1: Overview of iSupplier Portal

Oracle iSupplier Portal is a communication tool that enables Arlington County and its suppliers to communicate with each other throughout the procure-to-pay process. It allows suppliers to view and manage purchase orders, receipts, invoices and company profiles in a real-time system that is available 24 hours a day, 7 days a week (24x7).

Benefits associated with using iSupplier include:

- Provides suppliers full access to their purchase orders (POs), which improves efficiency by decreasing the number of calls between suppliers and Arlington County.
- Provides 24x7 access.
- Provides a central location for all PO information, and gives suppliers access to historical PO information.
- E-mails notification of pending orders to suppliers and provides them inbox functionality to help them manage their orders from Arlington County.
- Reduces paperwork, fax, and e-mail communications.
- Enhances the visibility of the transactions that occur between Arlington County and its suppliers.
- Provides a central location for all account information, including contacts, bank accounts and addresses and provides suppliers with the functionality to maintain their own account.

Lesson 1-2: Help and Support

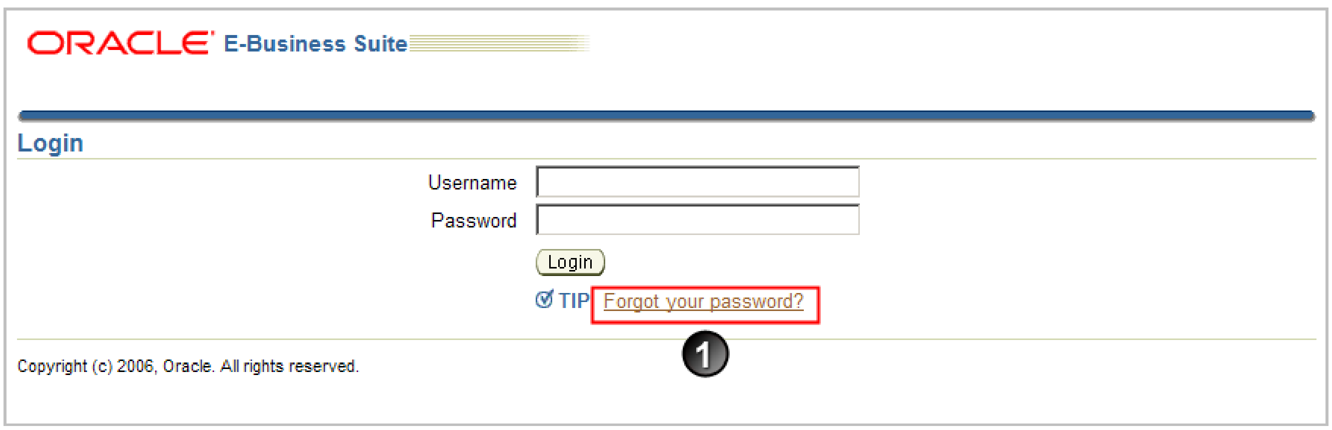
If you have problems logging in to iSupplier Portal or if you have questions related to using iSupplier Portal or cannot log into the system, email isupplier@arlingtonva.us and include **iSupplier Portal Question or Password Reset** in the Subject field.

Forget your password but remember your Username? If you cannot remember your password but do remember your Username, you can reset your password by following the Password Reset steps below.

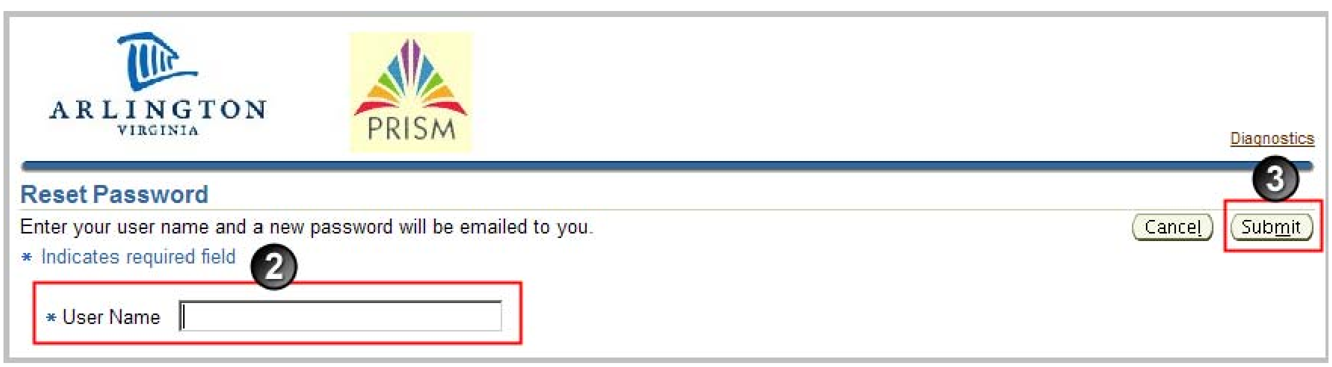
Password Reset

1. **To reset your password navigate to the iSupplier Portal login page, go to https://eprism.arlingtonva.us.**
   You can add this link to your internet browser *Favorites* for easy access in the future.

   Note: *Access to this link is also available through the main county website by clicking on "Suppliers" under the "Businesses" section.*

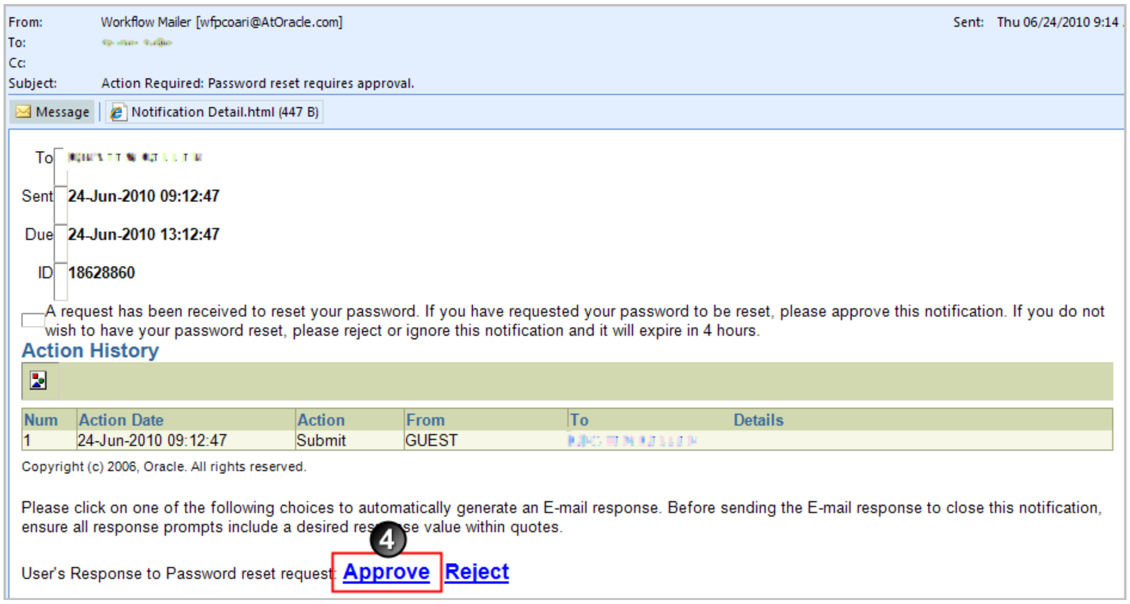


- Select the **Forgot your password**? Link, see **1** above.

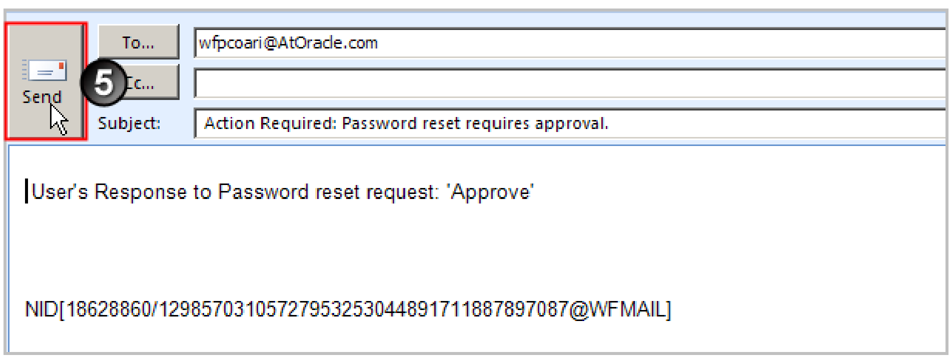


- Enter your **User Name**, see **2** above.
  Note: *Your User Name should be your company email address you used to register.*
- Select the **Submit** button, see **3** above.

2. **You will receive and need to respond to an email from wfpcoari@AtOracle.com with the subject "Action Required: Password reset requires approval."**



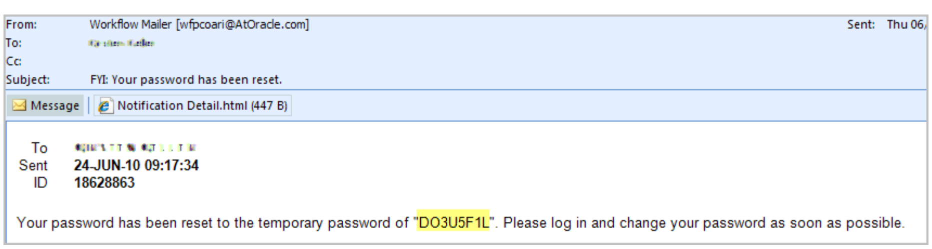
- Select the **Approve** link, see **4** above.



- Your default email application will automatically create a reply email; select the **Send** option from your email application, see **5** above.

3. **After a few minutes, you will receive your temporary password by way of email from wfpcoari@AtOracle.com with the subject "FYI: Your password has been reset."**

   At this time you can return to the iSupplier Portal login screen and log into the application. *You will be required to change your password*. Please see **Lesson 1-3** below for information on how to log into the application.

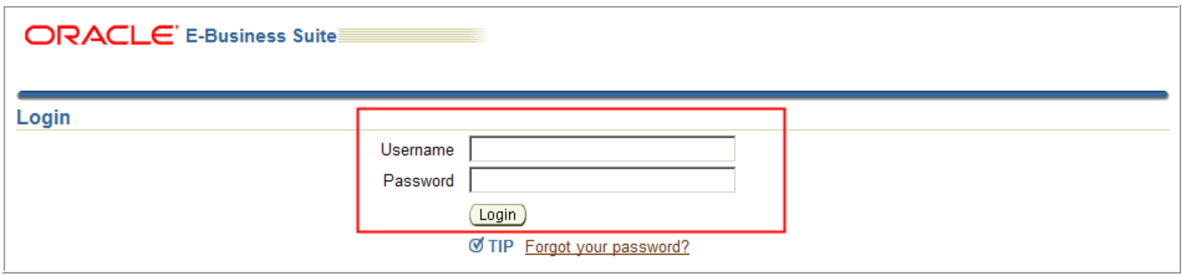


Lesson 1-3: Log into iSupplier Portal

To use iSupplier Portal, you must be registered with Arlington County. When you are logged into iSupplier Portal, you are only able to view transactions which occur between your company and Arlington County.

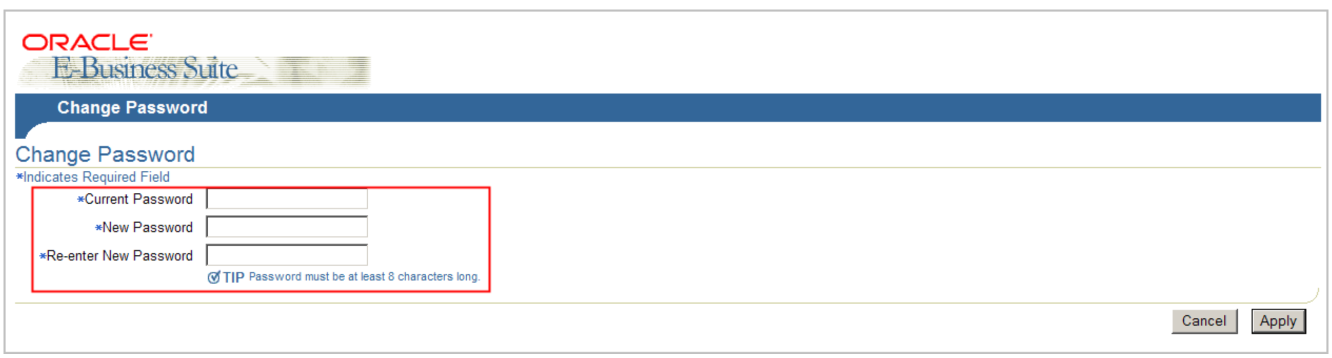
1. **To login to iSupplier Portal, go to https://eprism.arlingtonva.us.**
   You can add this link to your internet browser *Favorites* for easy access in the future.

   Note: *Access to the link is also available through the main county website by clicking on "Suppliers" under the "Businesses" section.*



2. **Type the Username and Password which were provided to you and click Login; refer to the above screenshot.**
   Note: *Your password is case sensitive.*

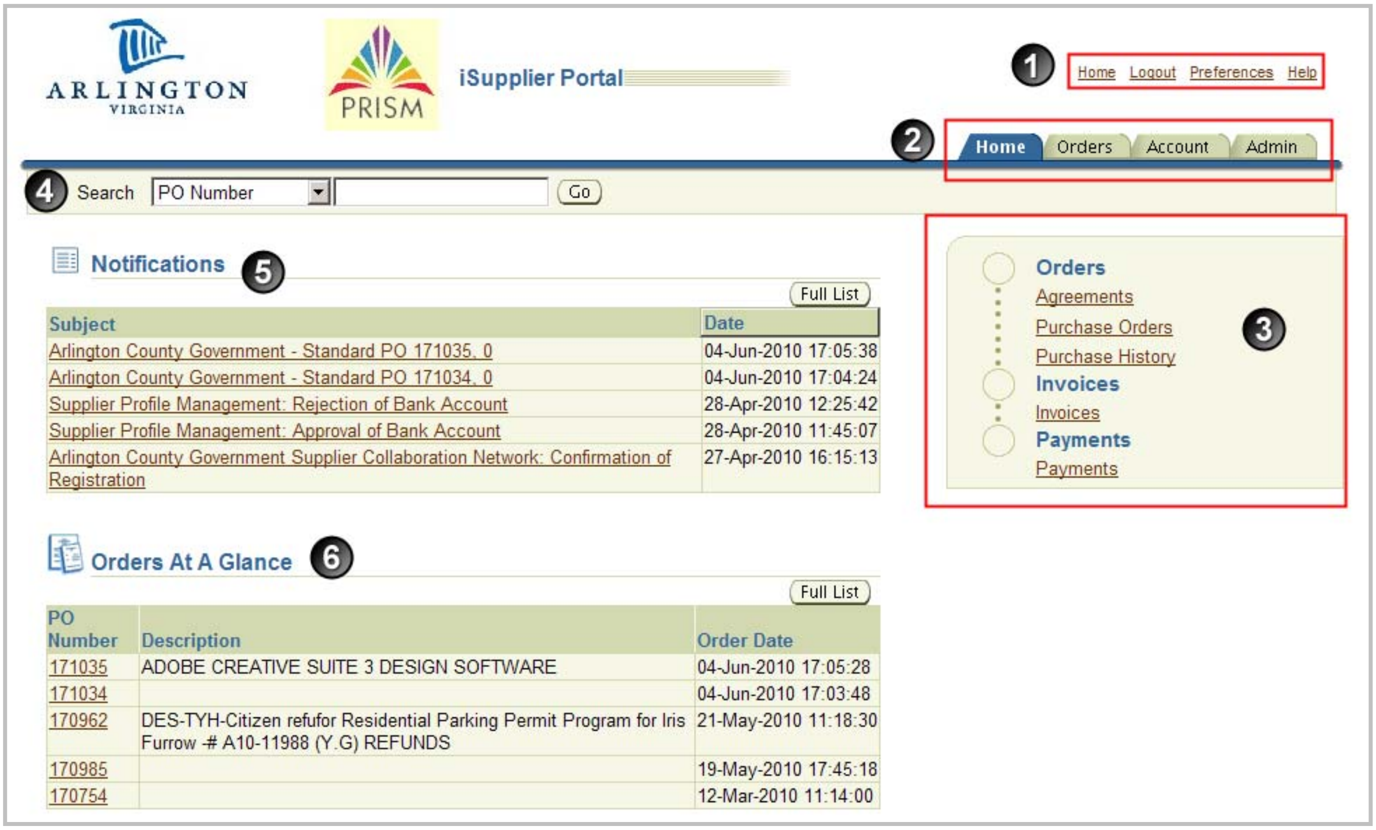
3. **You will be prompted to change your password before continuing the first time you log into the application and every 90 days.**



4. **Complete all required information to change your password.**
   - Password must be at least 8 characters long.
   - Password must contain at least one number and one letter.
   - Password must not contain repeating characters.
   - Password must not contain the username.

Lesson 1-4: iSupplier Portal Home Page

After you log into iSupplier Portal, the iSupplier Home page displays as shown below.



1. **Global Links: Global links, see 1 above, are available on all Oracle iSupplier Portal pages.**

   - Home: Returns you to the Arlington County E-Business Suite Navigator page where you can select another application or action.
   - Logout: Logs you out of the Arlington County E-Business Suite.
   - Preferences: Allows you to set user preferences, including selecting a start page to automatically open when you log into the portal.
   - Help: Opens the Oracle iSupplier Portal Help.

2. **Tabs: Tabs, see 2 above, are used to organize pages by category. When you click a tab, related page links display on the blue taskbar that appears directly below the tab.**

3. **Quick Links: This section, see 3 above, displays the procure-to-pay flow through the iSupplier Portal application. Selected pages appear here for easy access. Click any link to go directly to the corresponding page.**

4. **Search: The search field, see 4 above, enables you to jump directly to a specific purchase order, shipment, invoice or payment. To search:**

   - Select a document type (purchase order, shipment, invoice or payment) from the drop-down list.

- Enter the document number.
- Click Go.

5. **Notifications: The Notifications section, see 5 above, displays your five most recent open notifications.**

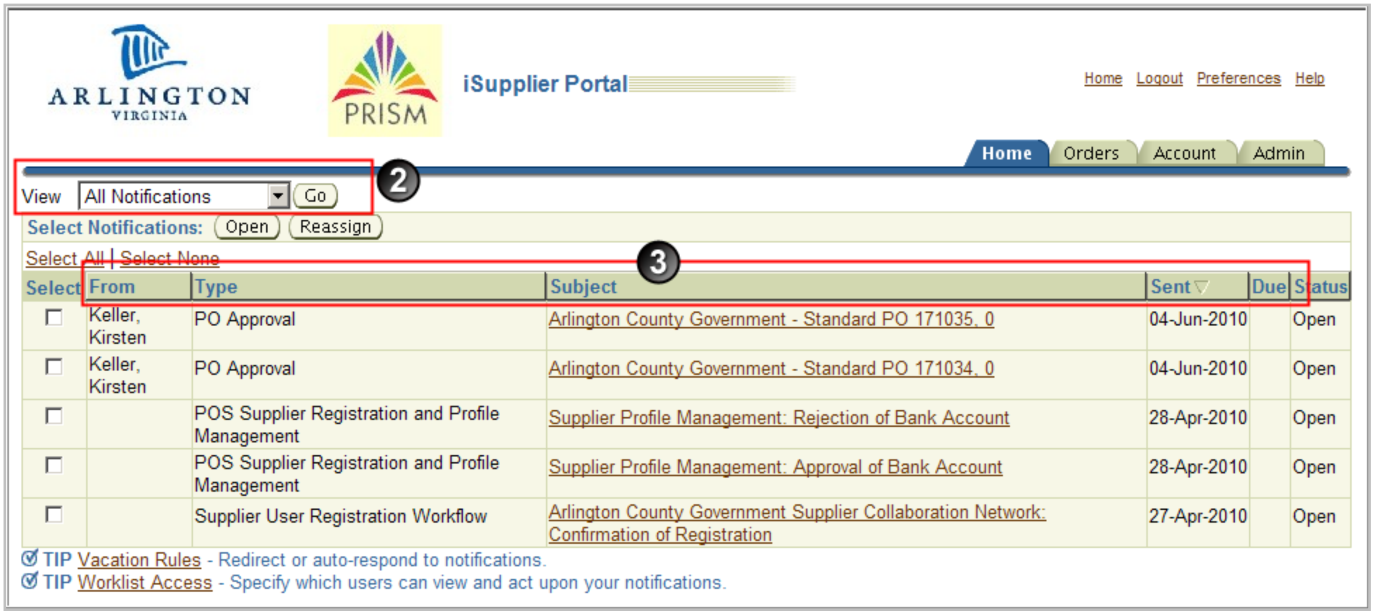
6. **Orders at a Glance: This section, see 6 above, displays your five most recent purchase orders.**

- Click a PO number link to view the purchase order details.
- Click the Full List button to view the Purchase Orders page.

Lesson 1-5: Notifications Page

You receive e-mail notifications for various events that occur throughout the procure-to-pay process. The Notifications page provides access to the notifications that you have received. You can review the notifications which have been sent or view notifications which you have accidentally deleted from your inbox.

1. **Click the Home tab and then click the Full List button in the Notifications section to open the Notifications page.**



2. **If necessary, select a notification type from the drop-down list and click the Go button, see 2 above.**

   Available notification types are:

   - **Open Notifications:** A list of notifications which you have not yet viewed or responded to.
   - **All Notifications:** A complete list of all notifications that have been sent.
   - **FYI Notifications:** A list of the notifications that do not require a response.
   - **Notification From Me:** A list of any notifications that you have sent.
   - **To Do Notifications:** A list of notifications which require your response.

3. **If you want to sort the list, click a raised column heading, see 3 above. Click the same column heading again to reverse the sort order, for example from A-Z order to Z-A order.**

   By default, the results list is sorted by date sent from most recent to oldest. Column headings include:

   - **Type:** The notification type.
   - **Sent**: Date when the notification was sent to you.
   - **Due**: If entered, date by which the notification should be completed.
   - **Status** (*All Notifications* view only): Open (needs a response), Closed (response was entered), Canceled (response no longer required).

4. **To view a notification, click a Subject link.**

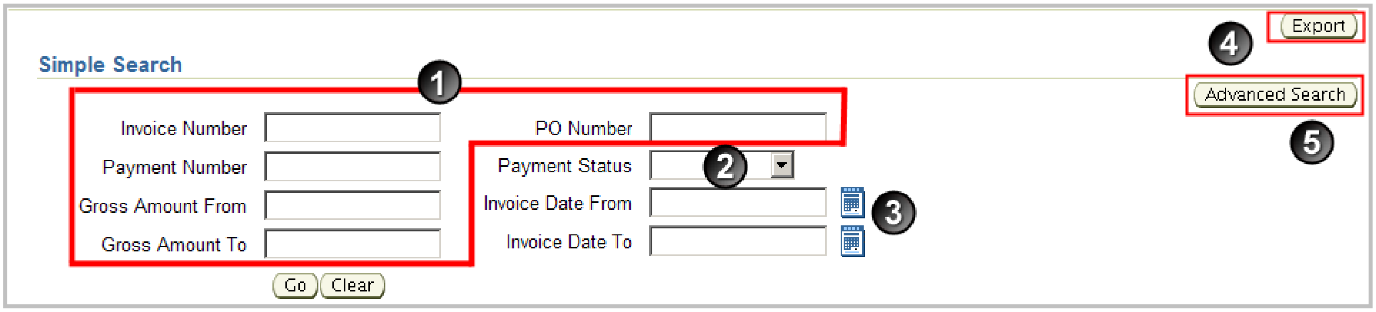
5. **For notifications that do not require a response, click OK to indicate that you have viewed the link.**
   After you click OK to indicate that you have read the message, the notification status will change to closed and the notification will no longer appear in your Open notifications list.

6. **For notifications that require a response, for example, to accept a PO, refer to the appropriate lesson in this manual for detailed instructions.**
   After you have taken an action, for example accepted or rejected a PO, the notification status will change to closed, and the notification will no longer appear in your Open notifications list.

Lesson 1-6: Searching

Most pages in iSupplier Portal provide search capabilities to help you retrieve information. The search results have many columns that allow you to sort your data.

Simple Search



Note: The % sign can be used as a wildcard when searching for items. The placement of the wildcard determines the search results returned.

- If you type **12%**, your results will display all matches beginning with 12.
- If you type **%12**, your results will display all matches ending with 12.
- If you type **%12%**, your results will display all matches containing 12.
- If you type **12**, your results will display exact matches of 12.

1. **Entering information in free form text fields, refer to 1 above.**
   - Type a complete or partial value in the field.
   - For example, in the **PO Number** field you can enter 112% to return all POs that begin with 112, like 112637 and 112985.

2. **Entering information in drop-down list fields, refer to 2 above.**
   - Select the drop-down list arrow and select the value.
   - For example, in the **Payment Status** field you can select **Paid** to return all Invoices that are in paid status.

3. **Entering information in date fields, refer to 3 above.**
   - Type a date directly in the **Date** field. The date must be in **DD-MON-YY** format, for example 10-APR-09.
   - Select a date from the calendar.
     1) Click the **Calendar** icon to open the calendar.
     2) Select a Month and Year from the drop-down lists.
     3) Click a date on the calendar to select it.

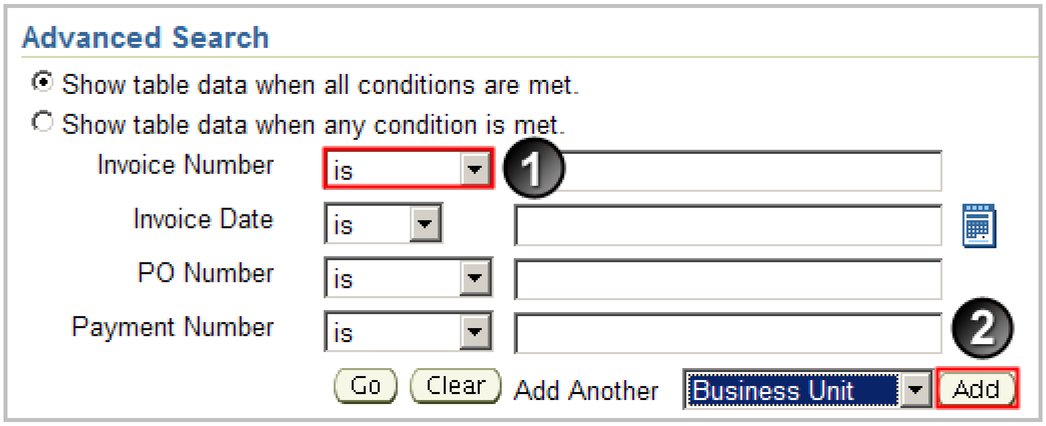
4. **Exporting data to Excel, refer to 4 above.**
   Only the information that is currently displayed on the page is exported to the spreadsheet. The spreadsheet data can then be formatted or printed. This feature also provides the possibility for your company to upload spreadsheet data into other programs that your company uses.

   - Click the **Export** button.
   - Select **Open** to view the data in Excel; select **Save** to save the file in .csv format.

5. **Entering advance search information, refer to 5 above.**

Select the **Advanced Search** button to build and narrow searches with the available search operators.

Advanced Search



Using Advanced Search, you can build and narrow searches by the list of available fields and search operators. Search operators enable you to specify the matching conditions for a search.

Available search operators:

is	Use this operator for an exact match
is not	Use this operator to exclude a specific match
contains	Use this operator to find a partial match
starts with	Use this operator to find a partial match that only starts with the criteria
ends with	Use this operator to find a partial match that only ends with the criteria
greater than	Use this operator to include results greater in value than a value specified
less than	Use this operator to include results lower in value than a value specified
after	Use this operator to include results with a date after the specified date
before	Use this operator to include results with a date before the specified date

1. **Entering a search operator, refer to 1 above.**
   Pick the operator from the **drop-down list** for the search field

2. **Adding another field to the search, refer to 2 above.**
   Add another field to your search by selecting the **Add** button.

CHAPTER 2: Purchase Orders

Chapter Objectives:

- Learn how to view POs and blanket agreements including their associated releases.

Chapter Tasks:

- View and print purchase orders
- View agreements

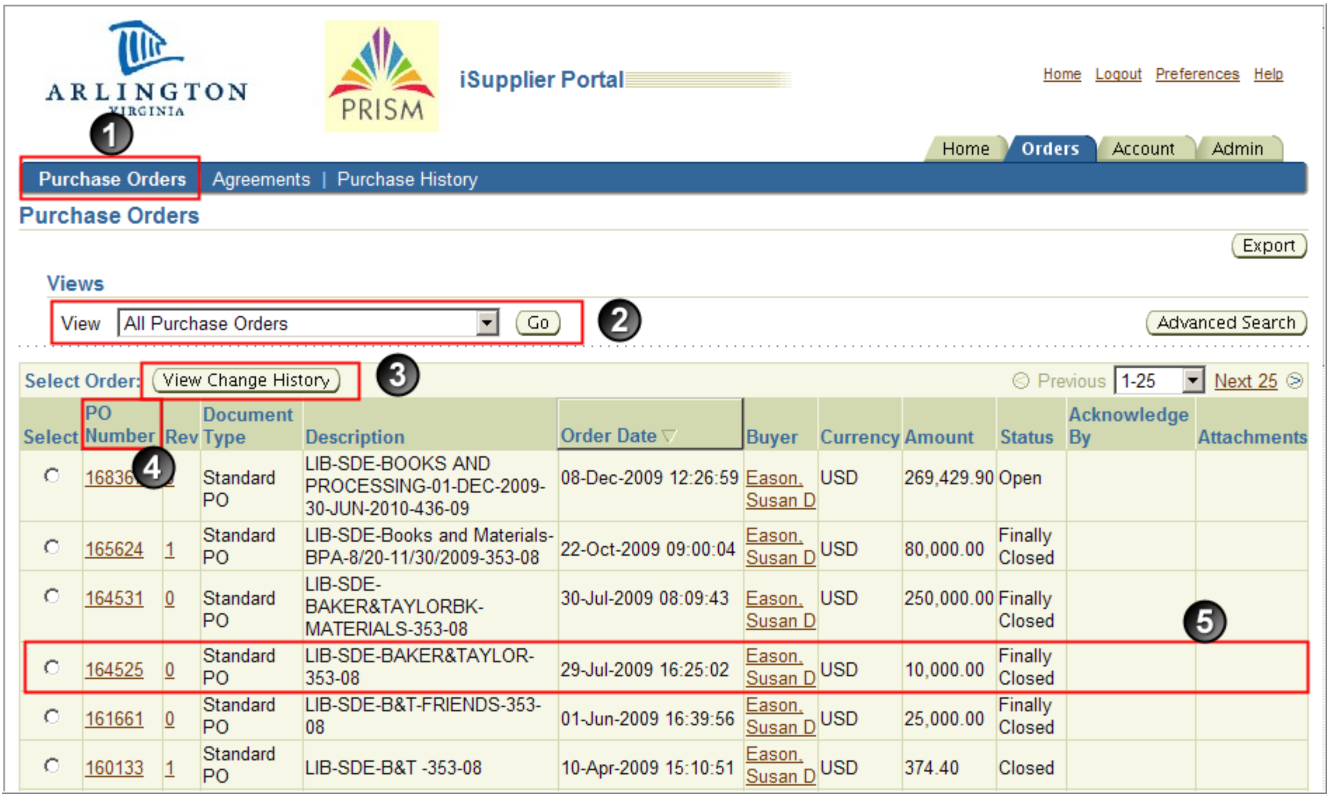
Estimated Lesson Time: 15 minutes

When Arlington County enters a purchase order for your company, you receive an e-mail notification and the purchase order details are available to you in iSupplier Portal.

If applicable, you can view supplier blanket agreements and the releases that have been made against the agreement. You can also view the revision history of a purchasing document and print copies of the purchase order associated with each revision.

Lesson 2-1: Purchase Orders Page

The Purchase Orders page allows you to view details associated with purchase orders, contracts, blanket agreements and blanket releases.   You can view details such as terms and conditions, lines, shipments, and attachments. This lesson explains the features that are available on this page.



1. **Click the Orders tab and then click Purchase Orders in the blue taskbar below the tabs, see 1 above.**
   The *Purchase Orders* page displays the most recent 25 purchase orders.

   Note: *Another way to open this page is to click the Purchase Orders quick link on the Home tab.*

2. **To view a different group of purchase orders, select the View from the drop-down list and click Go, see 2 above.**
   Available view options are: *All Purchase Orders*, *Purchase Orders to Acknowledge* and *Purchase Orders Pending Supplier Change*.

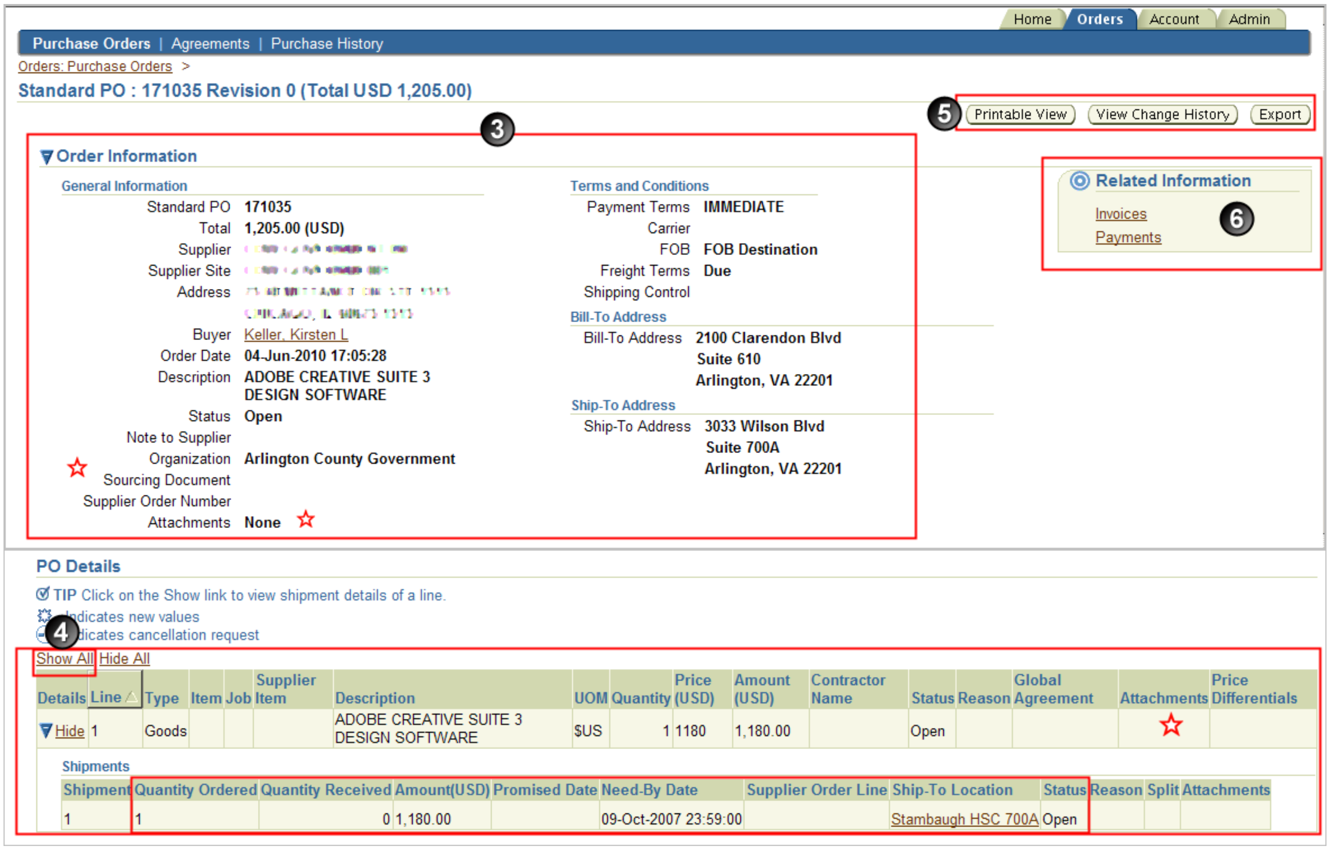
3. **After selecting a PO, you can click an action button, see 3 above.**
   Action buttons are also available on the PO information and details page. Valid actions are dependent on the associated PO's *Document Type* and *Status*.
   - View Change History: Valid for all statuses.

4. **To change the way that the information is sorted, click a raised column heading, see 4 above.**
   Click the column heading again to reverse the sort order, (from A-Z to Z-A).

5. **Summary information is displayed for each result, see 5 above.**

- The Document Type and Status determine the actions that are available to you.
  - Standard Purchase Order: Standard purchase orders specify the goods or services being purchased, and include costs, quantities and accounting. Standard POs which reference contracts are referred to as Release POs. Standard POs are also created for one-time purchases.
  - Blanket Agreement: Arlington County uses Blanket Purchase Agreements (BPAs) to purchase materials at an agreed upon rate for a specific time period. A blanket agreement specifies the pricing for the materials should they be purchased.
  - Blanket Release: Arlington County creates a Blanket Release purchase order to order items that are contained in a blanket purchase agreement (BPA).
- Available Status types are:
  - Open: Displays for purchase orders that do not require acknowledgement.
  - Closed/Finally Closed: Displays for purchase orders that have been closed.
- Linked information includes:
  - **PO Number:** Click this link to view the PO header information and details. The information displayed varies based on the PO type. A summary of the amount received and invoiced is shown.
  - **Revision**: Indicates the current PO revision number. Click this link to access the Purchase History page which displays details related to the changes that have been made to the PO.
  - **Buyer**: Click this link to view the Arlington County buyer's email address and other information.

Lesson 2-2: View Purchase Orders



You can view and print purchase order details on the purchase order and details page shown above.

1. **Click the Orders tab and then click Purchase Orders in the blue taskbar below the tabs.**
   The *Purchase Orders* page displays.

2. **Locate and click the PO Number link for the purchase order that you want to view.**
   The *PO* information and details page displays as shown above.

   Note: *You can also open a Purchase Order or Blanket Release Purchase Order from the Search text box on the Home tab. To do this enter the PO number or Blanket Release PO number (for example, 292584-989) in the Search text box and click Go.*

3. **The Order Information area displays selected PO header information, see 3 above.**
   - **Sourcing Document**: If a *number* link appears here (see below), it indicates that the document is a result of a sourcing event. Click the link to view the related sourcing document.
   - **Attachments**: If a *View* link appears here, click the link to view the attached document.

4. **To view Shipments and PO Line level details, click the Show All link, see 4 above.**
   The information that is displayed in the PO Details section varies based on the *Document Type* (Standard PO, Contract, Blanket Agreement, Blanket Release), the *Status* and the type of items on the PO. Items to note:

   Note: *Received amounts are not always available.*

- **Shipments Section**: Displays current applicable shipment line information, such as Quantity Ordered and Quantity Received (goods) or Amount Received (services), Need-By Dates and Amounts and status (accepted or rejected).
    - Click the **Ship-To Location** link to view address details.
    - **Attachments**: If a *View* link appears here, click the link to view the attached document.

5. **Purchase Order Action Buttons, see 5 above.**
    - **To view a copy of the Purchase Order document, select the Printable View button.** A PDF version of your purchase order opens in a new window. You may print or save the PDF document from that window.
    - **To view PO change history, select the View Change History button.** ***Note:*** *Change History may not always be available.*
    - **To export the PO header information to Excel, select the Export button.**

6. **Click Invoices or Payments links in the Summary section, see 6 above, to view invoices and payment details for the selected PO.**

CHAPTER 3: Invoices and Payments

Chapter Objectives:

- Learn how to track invoice and payment information

Chapter Tasks:

- View invoices
- View payments

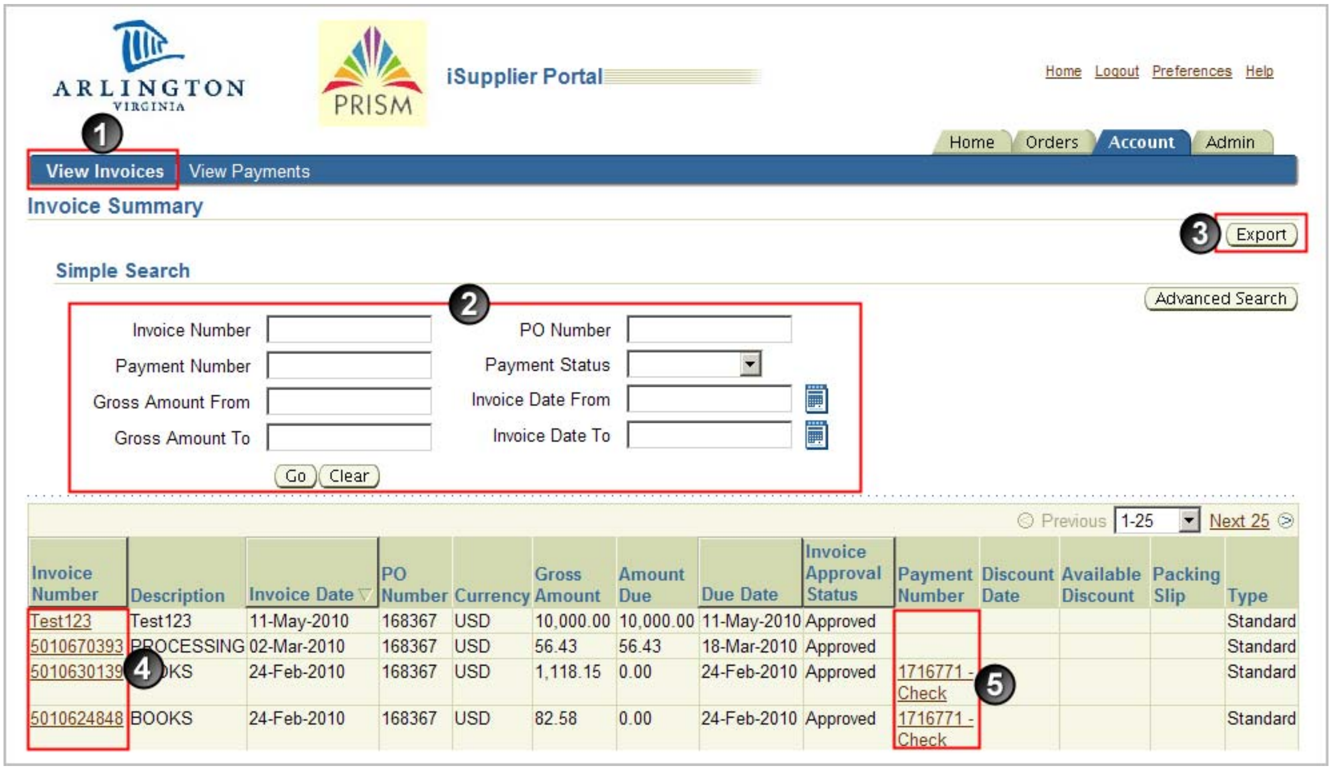
Estimated Lesson Time: 10 minutes

You can access invoice and payment information as well as review invoice status online using iSupplier Portal.

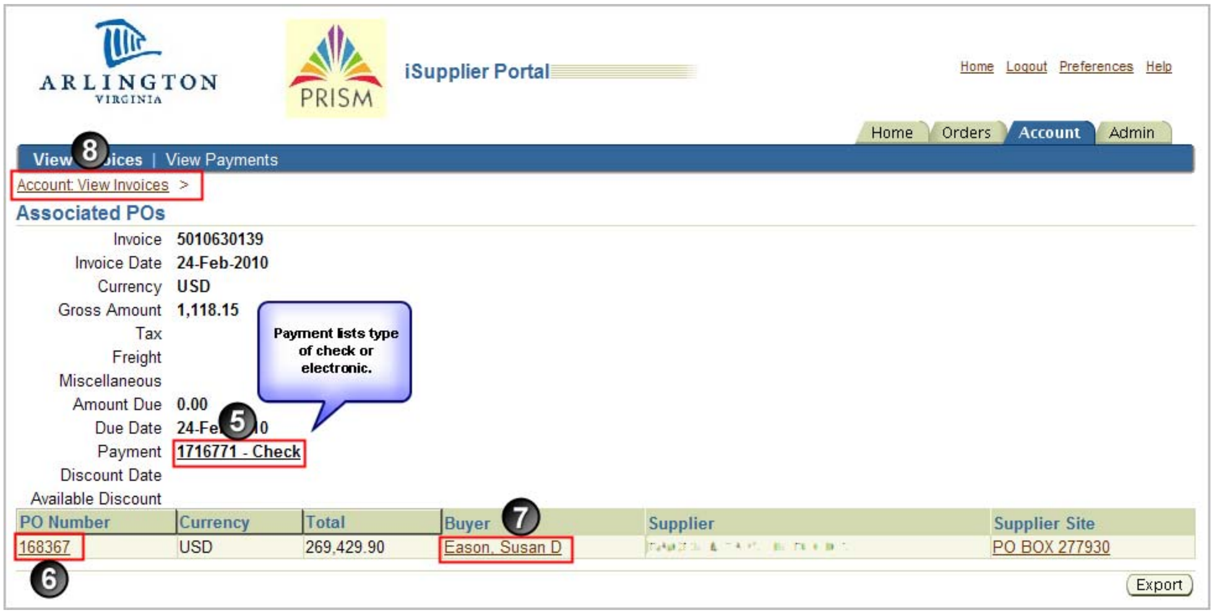
Lesson 3-1: View Invoices

Use the *View Invoices* feature to view your company's invoice information that has been entered into Arlington County's Accounts Payable system as of April 6, 2006.

This page displays only the invoices which have been processed by Arlington County. If you have submitted invoices which are not displayed on this page, they are probably still being processed.



1. **Click the Account tab and then click View Invoices on the blue taskbar, see 1 above.**
2. **Enter your** search criteria **and click Go, see 2 above. Leave the fields blank if you want to view all invoices.**
   For more detailed information on how to search, please see Lesson 1-6.
3. **To export the results to Excel, click the Export button, see 3 above.**
   For more information on exporting to Excel, please see Lesson 1-6.
4. **To view additional details for the invoice, click an Invoice Number link, see 4 above.**
   The *Invoice Details* page displays PO and payment details, as shown on the next page.


ARLINGTON VIRGINIA
PRISM
iSupplier Portal
Home Logout Preferences Help
Home Orders Account Admin
View Invoices | View Payments
Account: View Invoices >

Associated POs

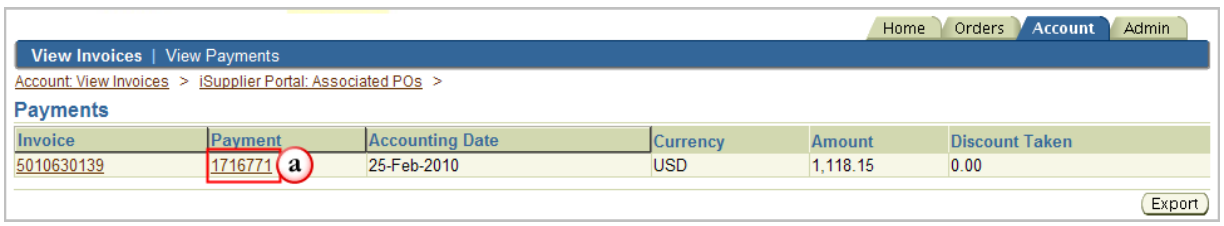
Invoice	5010630139
Invoice Date	24-Feb-2010
Currency	USD
Gross Amount	1,118.15
Tax	
Freight	
Miscellaneous	
Amount Due	0.00
Due Date	24-Feb-2010
Payment	1716771 - Check
Discount Date	
Available Discount	

Payment lists type of check or electronic.

PO Number	Currency	Total	Buyer	Supplier	Supplier Site
168367	USD	269,429.90	Eason, Susan D	[illegible]	PO BOX 277930

Export

5. **If present, click a Payment Number link on any page, see 5, to drill down to the payment details.**
If more the invoice was paid by more than one payment, you may see multiple payment numbers listed.

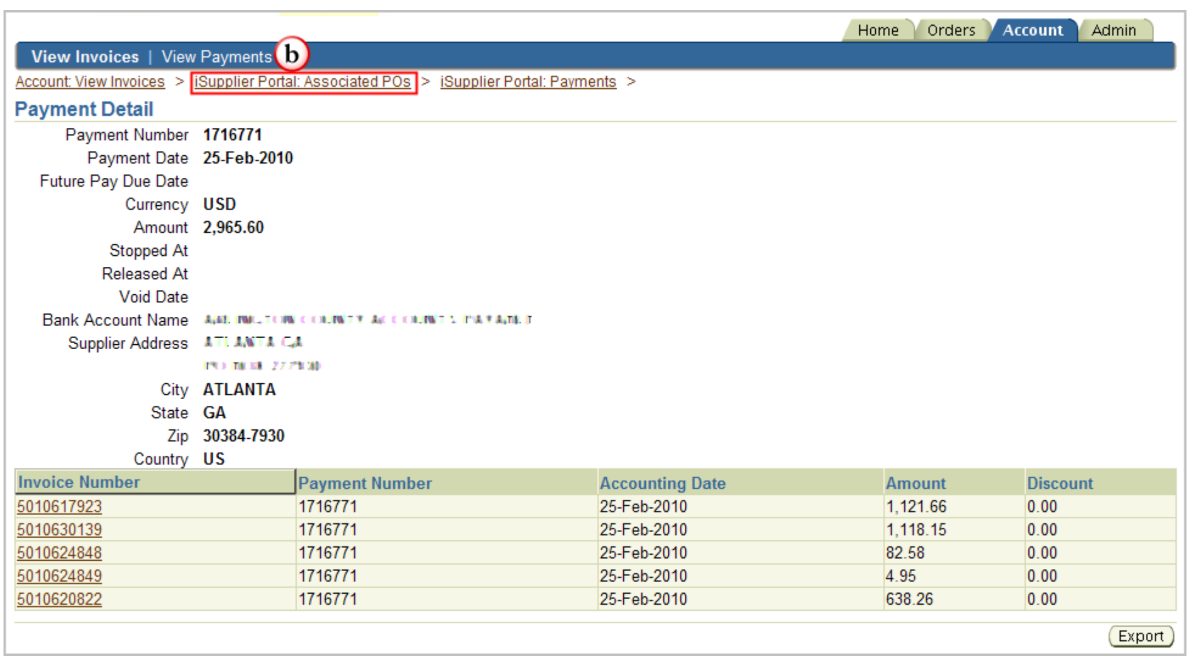

Home Orders Account Admin
View Invoices | View Payments
Account: View Invoices > iSupplier Portal: Associated POs >

Payments

Invoice	Payment	Accounting Date	Currency	Amount	Discount Taken
5010630139	1716771 a	25-Feb-2010	USD	1,118.15	0.00

Export

To view a list of all invoices included in the payment, select the **Payment** link, see **a** above.


Home Orders Account Admin
View Invoices | View Payments b
Account: View Invoices > iSupplier Portal: Associated POs > iSupplier Portal: Payments >

Payment Detail

Payment Number	1716771
Payment Date	25-Feb-2010
Future Pay Due Date	
Currency	USD
Amount	2,965.60
Stopped At	
Released At	
Void Date	
Bank Account Name	[illegible]
Supplier Address	[illegible]
City	ATLANTA
State	GA
Zip	30384-7930
Country	US

Invoice Number	Payment Number	Accounting Date	Amount	Discount
5010617923	1716771	25-Feb-2010	1,121.66	0.00
5010630139	1716771	25-Feb-2010	1,118.15	0.00
5010624848	1716771	25-Feb-2010	82.58	0.00
5010624849	1716771	25-Feb-2010	4.95	0.00
5010620822	1716771	25-Feb-2010	638.26	0.00

Export

Click the **iSupplier Portal: Associated POs** link, see **b** above, to return.

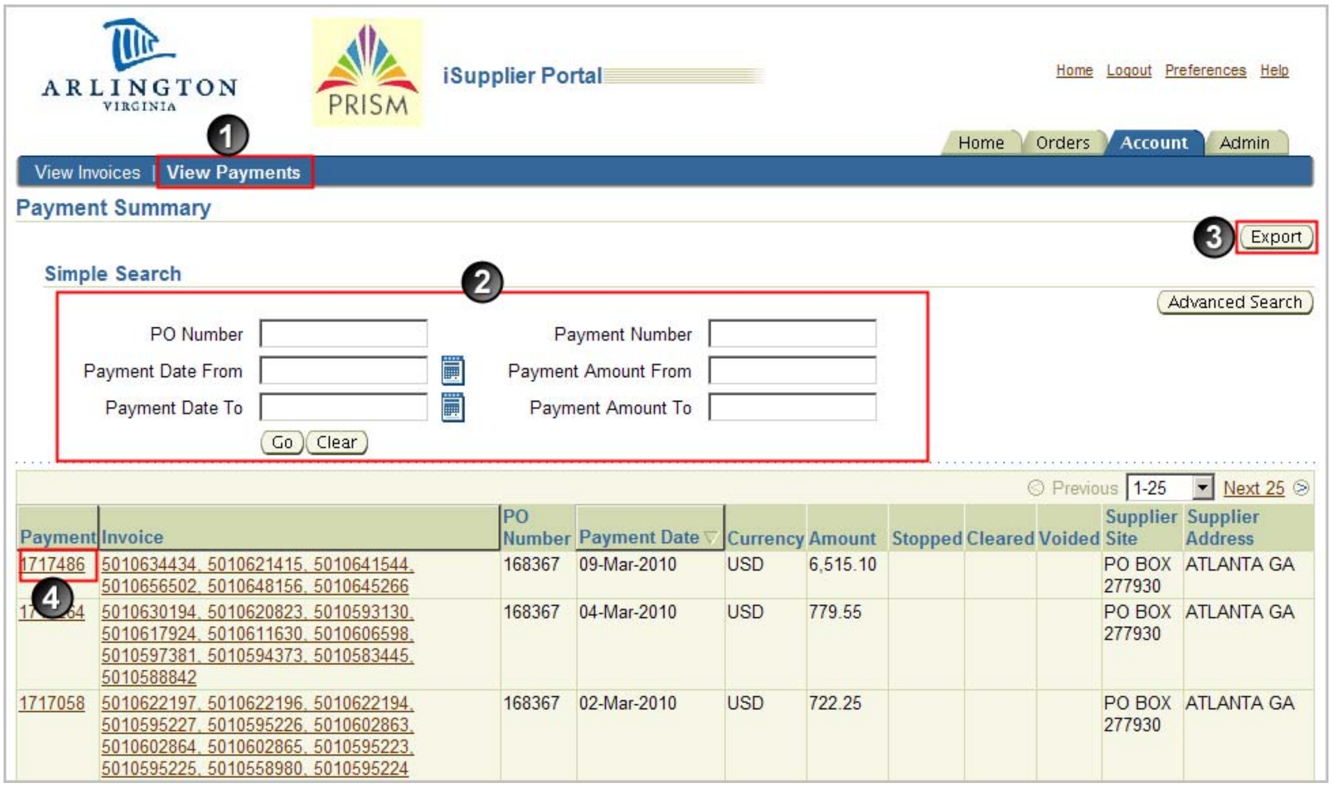
6. **Select the PO Number link to view purchase order details, see 6 above.**
   See Lesson 2-2 for more information about this page.

7. **Select the Buyer link to view Arlington County buyer information, including name, location and email address, see 7 above.**

8. **Select the Account: View Invoices link, see 8 above, to return to the View Invoices page.**

Lesson 3-2: View Payments

Use the *View Payments* feature to view the history of all the payments that Arlington County has made for your invoices. Use this feature to view the details associated with the payment, including the invoices which were included in the payment. Payment information is only available for invoices that were entered into the system beginning April 3, 2006.

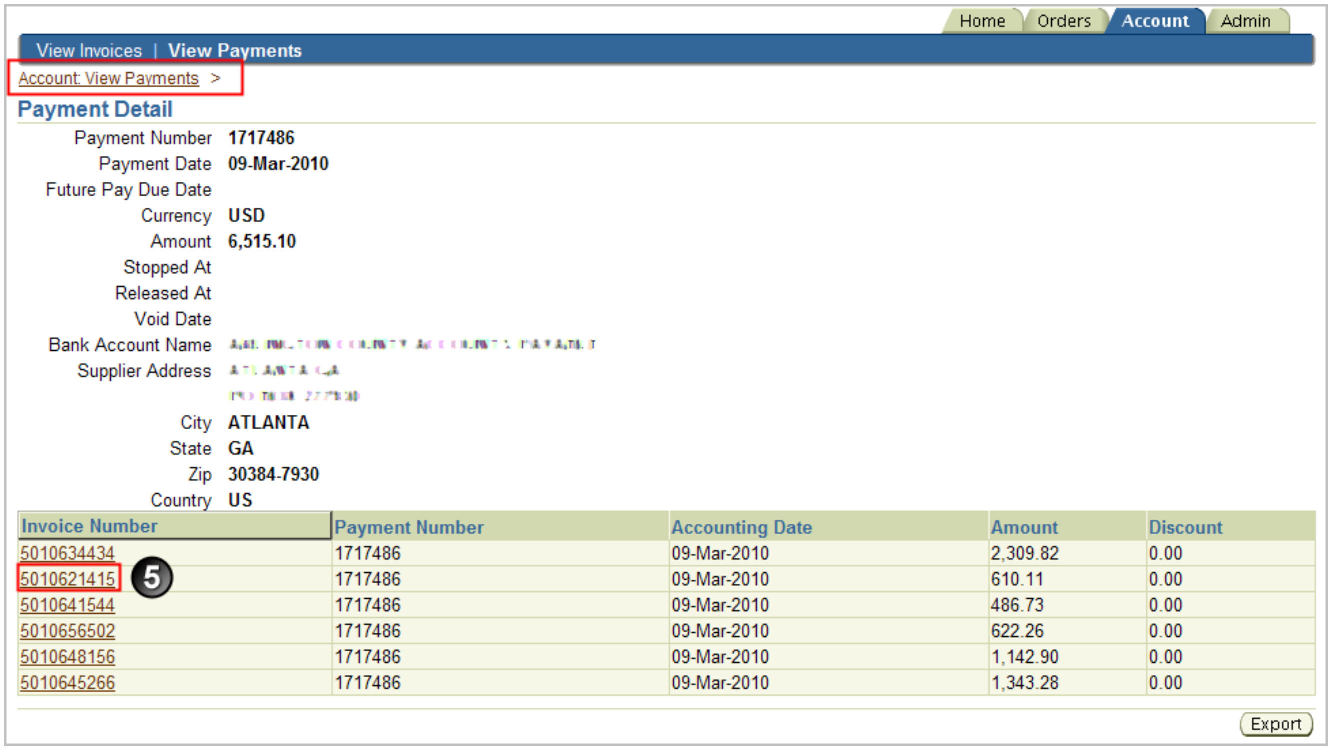


1. **Click the Account tab and then click View Payments in the blue taskbar, see 1 above.**
   The *Payment Summary* search page displays as shown above.

2. **Enter your search criteria and click Go, see 2 above.**
   Do not enter any search criteria if you want to view all payments. The results list displays the payment data that matches the criteria entered.

3. **To export the results to Excel, click the Export button, see 3 above.**
   For more information on exporting to Excel, please see Lesson 1-6.

4. **Click a Payment link, see 4 above, to view payment details and a list of the invoices which were included in the payment.**
   This link displays the *Payment Details* page, as shown on the next page. There can be one or more invoice lines in the Payments list depending on how many invoices were included in the payment. If you select a specific invoice, the *Invoice Details* page displays the details for the invoice.


Home | Orders | Account | Admin

View Invoices | View Payments

Account: View Payments >

Payment Detail

Payment Number 1717486
Payment Date 09-Mar-2010
Future Pay Due Date
Currency USD
Amount 6,515.10
Stopped At
Released At
Void Date
Bank Account Name
Supplier Address
City ATLANTA
State GA
Zip 30384-7930
Country US

Invoice Number	Payment Number	Accounting Date	Amount	Discount
5010634434	1717486	09-Mar-2010	2,309.82	0.00
5010621415 ❺	1717486	09-Mar-2010	610.11	0.00
5010641544	1717486	09-Mar-2010	486.73	0.00
5010656502	1717486	09-Mar-2010	622.26	0.00
5010648156	1717486	09-Mar-2010	1,142.90	0.00
5010645266	1717486	09-Mar-2010	1,343.28	0.00

Export

5. **Click an Invoice Number link on any page, see 5, to view an Invoice Summary, as shown below.**
   The invoice summary page displays invoice and payment details.


ARLINGTON VIRGINIA | PRISM | iSupplier Portal

Home Logout Preferences Help

Home | Orders | Account | Admin

View Invoices | View Payments

Account: View Payments > iSupplier Portal: Payment Detail >

Invoice Summary

Export

Invoice Number	Description	Invoice Date	PO Number	Currency	Gross Amount	Amount Due	Due Date	Invoice Approval Status	Payment Number	Discount Date	Available Discount	Packing Slip	Type
5010621415	BOOKS	04-Feb-2010	168367	USD	610.11	0.00	08-Mar-2010	Approved	1717486 - Check				Standard

CHAPTER 4: Profile Management

Chapter Objectives:

- Learn how to manage key profile details used to maintain a business relationship with Arlington County, such as: contacts, addresses and payment information.

Chapter Tasks:

- View supplier details and add attachments, such as W-9 documents.
- View, edit and add address information.
- View, edit and add contact information.
- View, edit and update bank account information for electronic payments.
- View a list of individuals from your company who have access to Arlington County's iSupplier Portal application.

Estimated Lesson Time: 20 minutes

Profile Management enables you to manage key profile details used to establish or maintain a business relationship with Arlington County. This information includes address information, names of main contacts, business classifications, banking details, and category information about the goods and services you are able to provide to the buyer.

Arlington County will review the details you provide and will update the records accordingly. Profile Management enables you to effectively represent yourself to Arlington County and update your company information as necessary, making important information accurate.

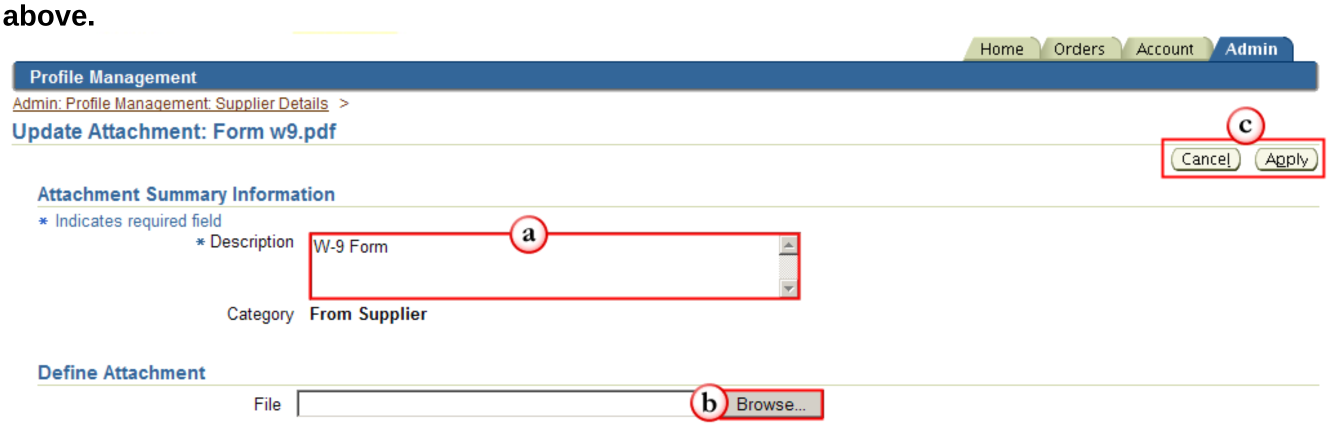
Lesson 4-1: Supplier Details

The *Supplier Details* is an introductory page to Profile Management. From this page you can add to or change certain profile information. You can also Add Attachments which enables you to upload documents pertinent to your relationship with Arlington County or to upload documents requested by Arlington County, for example, the IRS W-9 form.

1. **Click the Admin tab to open the Supplier Details page, see 1 above.**
   The *Supplier Details* page displays as shown above. Here you can view your company name on record with Arlington County, a designated Supplier Number, Tax ID/TIN/SSN and pertinent documents.

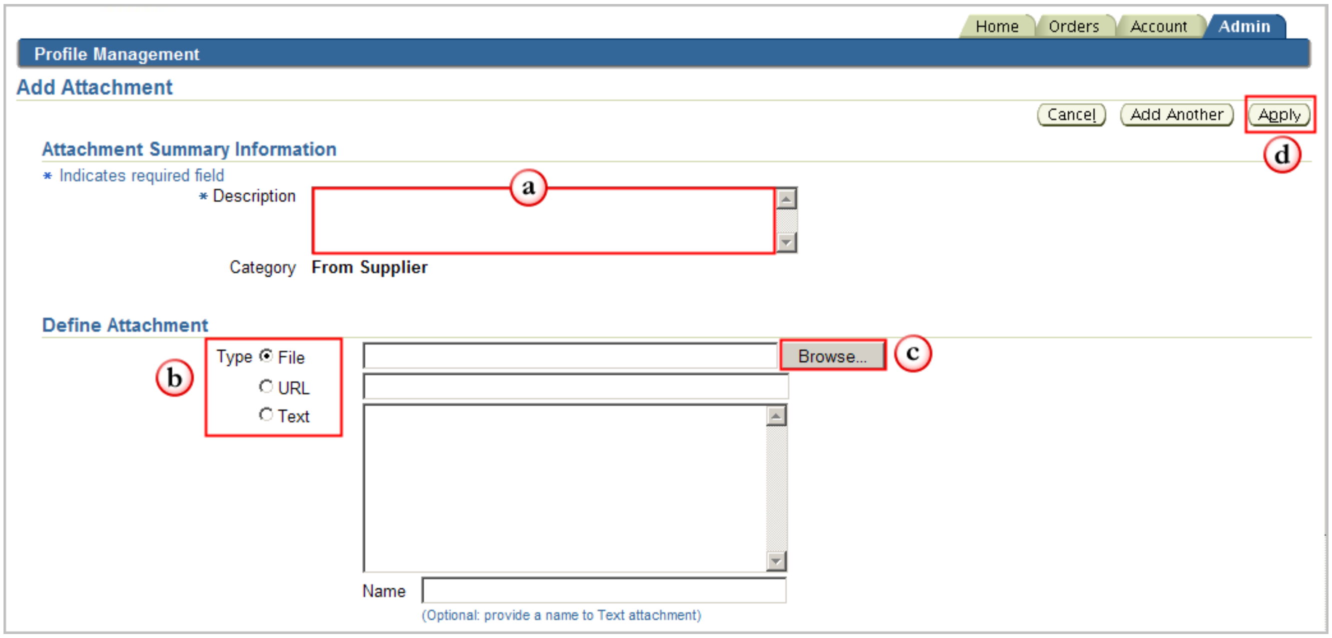
2. **Click on any File Name link to view a document, see 2 above.**

3. **Select the Update pencil icon to make modifications to the selected attachment, see 3 above.**



- Update the document *Description*, see **a** above.
- Update the *File* by clicking the Browse button and selecting a new file, see **b** above.
- Click the Cancel button to return or select the Apply button to save your changes, see **c** above.

4. **Click the Add Attachments button to browse for and upload a new document to your profile, see 4 above.**



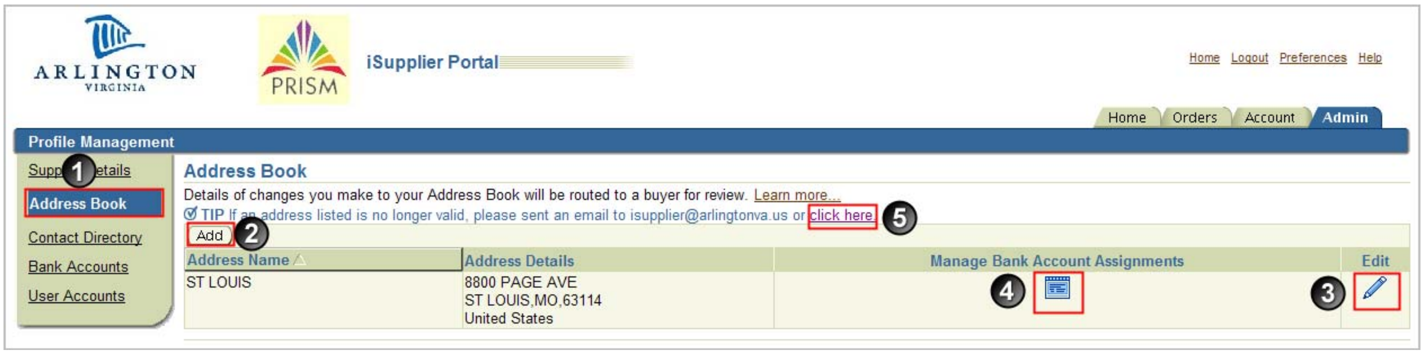
To Add an Attachment:

- Enter a short *Description* to help you identify the attachment/document, see **a** above.
- Select the *Type* of attachment: File, URL or Text. See **b** above.
- To upload a file click the *Browse* button and select the file, see **c** above.
- Click the *Apply* button to save the changes, see **d** above.

Lesson 4-2: Address Book

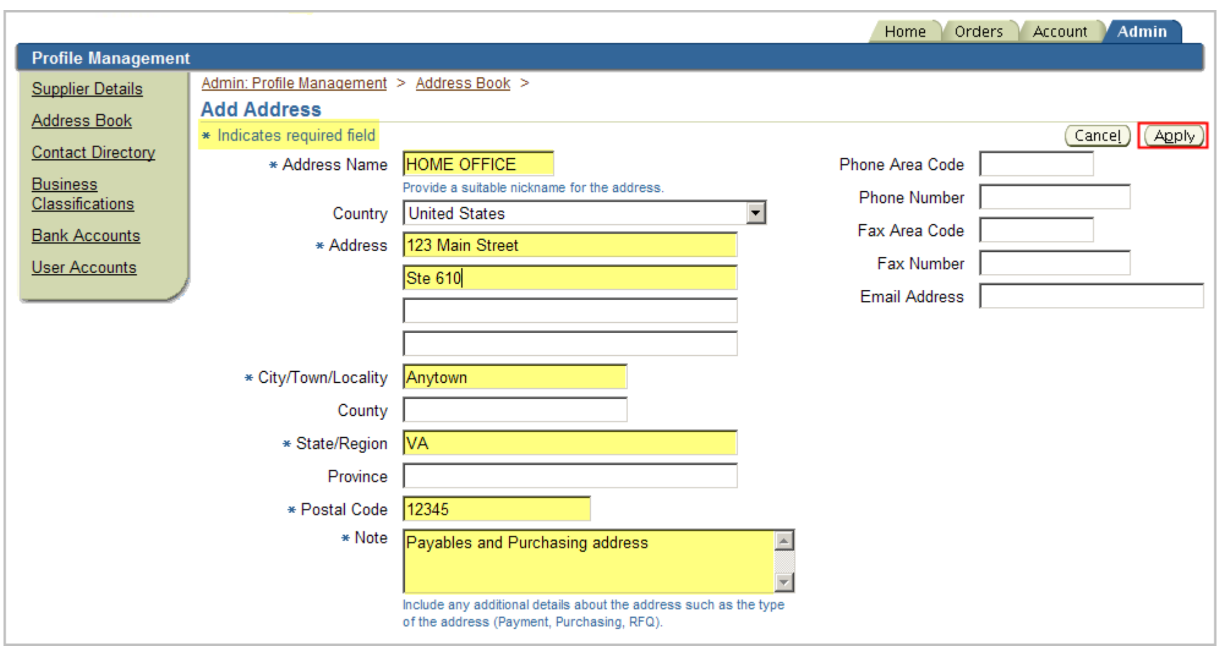
You can enter profile details such as address book information online. You can create and modify the multiple addresses used in transactions with Arlington County, for example, purchasing locations and payment sites. You can inactivate addresses that are obsolete, as well as view and update bank account details associated with each address.

After you enter address information, Arlington County administrators are notified of the changes and must review and approve the updates. Therefore, any changes you make may not be promoted to the system for a few days.



1. **From the Admin tab, click the Address Book link, see 1 above.**

2. **To enter a new address, click the Add button, see 2 above.**



Complete the required fields and select **Apply**.

Note: *If you add a Payables address and you are paid via EFT, remember to link a bank account by selecting the Return to Address Book link and then the Manage Bank Account Assignments icon.*

3. **To update which bank account can be used for an existing address, select the Manage Bank Account (Notepad) icon, see 4 above.**

Check the **Used by Address** and **Primary Account** checkboxes and select **Apply**.

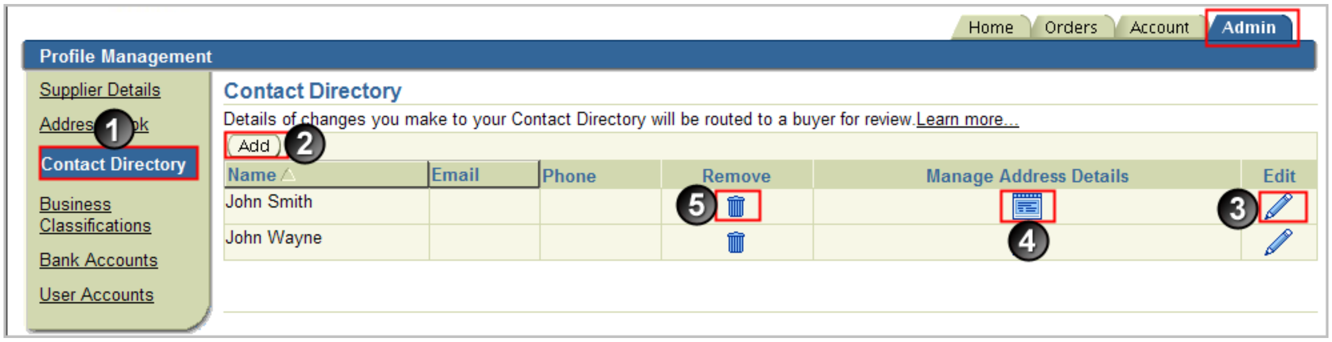
4. **To edit an existing address, click the Edit (Pencil) icon, see 3 above.**
   Update the address fields and select Apply.

5. **To inactivate an existing address, please email isupplier@arlingtonva.us. You can select the click here link, see 5 above, to generate an email from your default email application.**

Lesson 4-3: Contact Directory

Through Profile Management you can enter contact information online. You can create and modify information about various individuals in your organization who interact with Arlington County, for example people who collect payments, issue invoices or respond to solicitations. You can also link the contacts to the appropriate address on record in your Address Book.

After you enter the information, Arlington County administrators will be notified for review and approval. Therefore, your changes may not be promoted to the system for a few days.

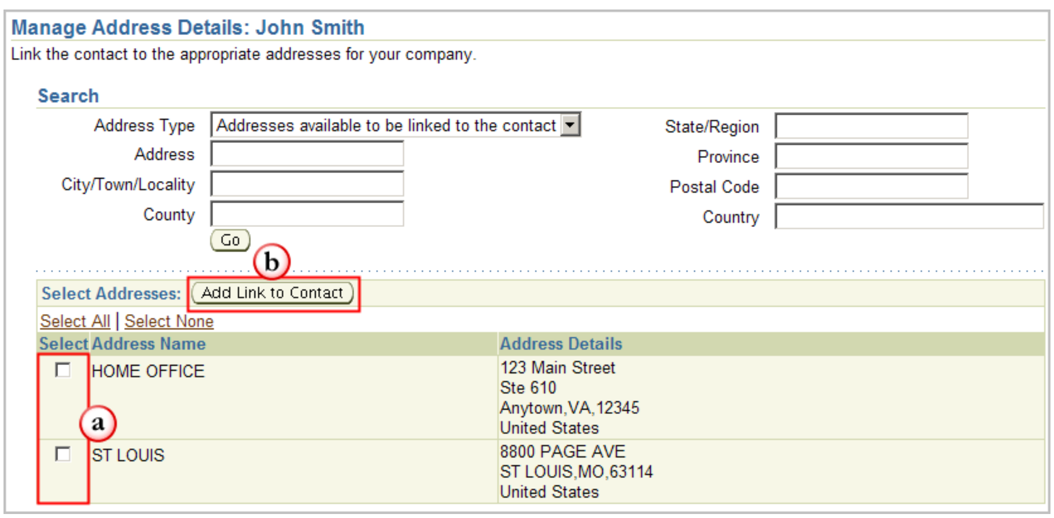


1. **From the Admin tab click the Contact Directory link, see 1 above.**

2. **To enter a new contact, click the Add button, see 2 above.**
   Complete the required information and select Apply to save.

3. **To edit a contact, click the Edit (Pencil) icon, see 3 above.**
   Update the information and select Apply to save your changes.

4. **To associate a contact with an address from your address book, click the Manage Address Details (Notepad) icon, see 4 above.**



- Select the **checkbox** for one or more addresses, see **a** above.
- Click the **Add Link to Contact** button, see **b** above.

5. **To remove a contact, click the Remove (Trash Can) icon, see 5 above.**

Lesson 4-4: Banking Details

You can add, edit or update bank account details that you want Arlington County to use when issuing payments to you. When you enter the bank account details, the system validate for duplicate entries.

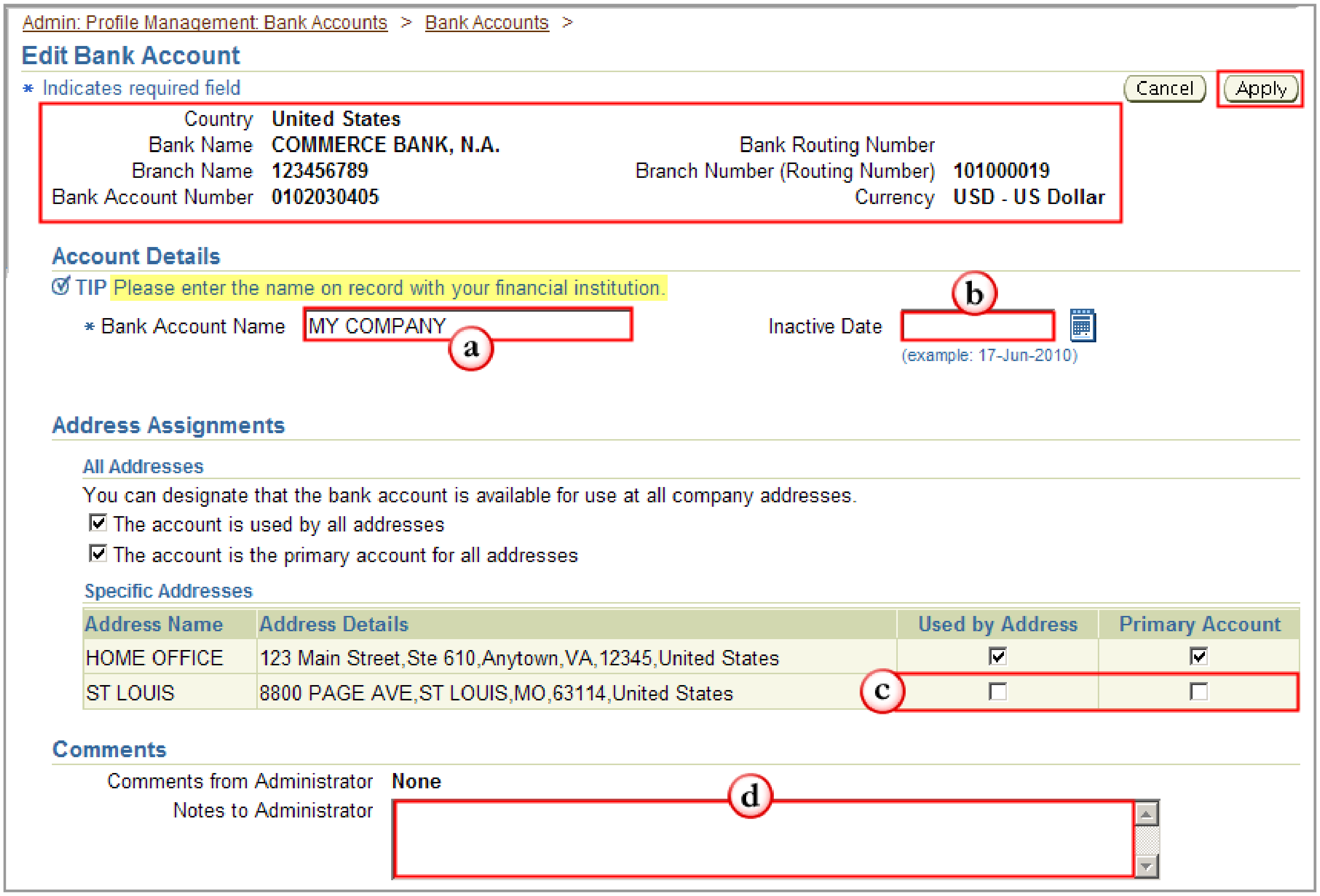
After you enter the information, Arlington County administrators will be notified for review and approval. Therefore, your changes may not be promoted to the system for a few days.

> ***Note:*** *If this is your first time logging on to this system, please take a moment to review the information here. If the information we have is inaccurate or there is no current bank information listed, please follow the below steps to ensure timely payment by Arlington County.*

1. **Click the Admin tab to open the Bank Accounts page, see 1 above.**
2. **To edit existing bank account details, click the Edit (Pencil) icon, see 2 above.**
3. **To add a bank account, click the Add button, see 3 above.**

Edit a Bank Account

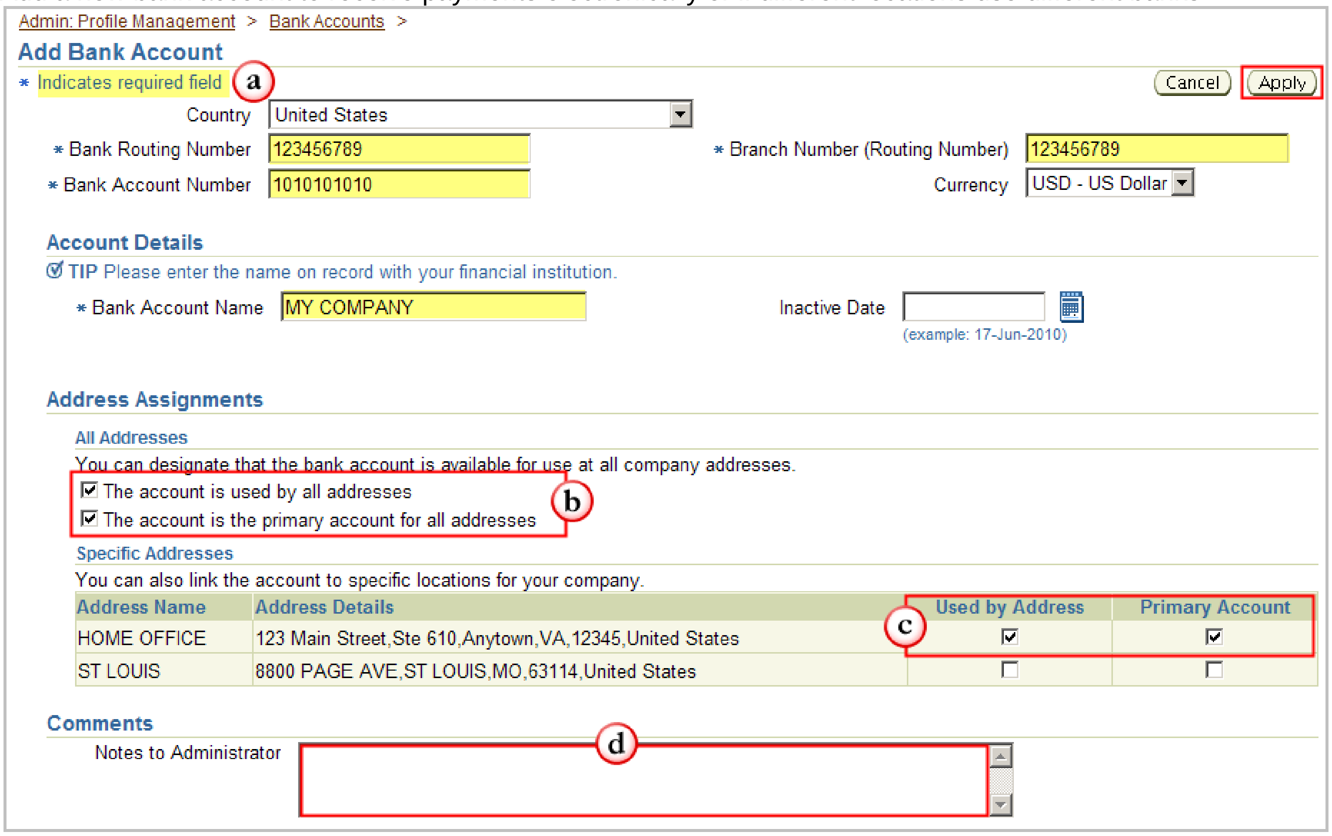
You can make changes to the Bank Account Name, Address Assignments or request to inactivate the bank account.



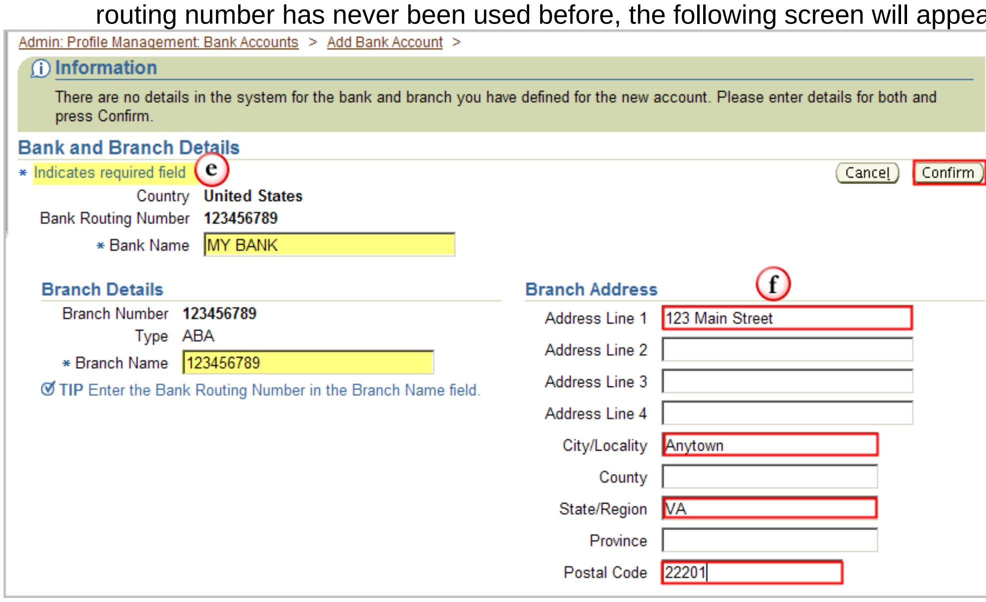
1. The **Bank Account Name** should be the name on record with your financial institution, see **a** above.
2. To inactivate a bank account, enter a date in the **Inactive Date** field, see **b** above.
3. Manage bank account address assignments by selecting the **Used by Address** and **Primary Account** checkboxes, see **c** above.
4. Send comments to the Arlington County administrator in the Notes to Administrator field, see **d** above.
5. Select the **Apply** button to save your changes.

Add a Bank Account

Add a new bank account to receive payments electronically or if different locations use different banks.

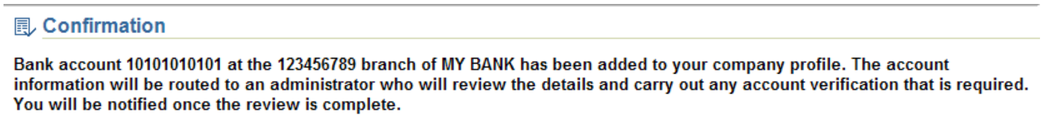


1. Complete **all required information** indicated by the * symbol, see **a** above.
   - For the bank number and branch number fields, provide the **bank routing number**. If the bank routing number has never been used before, the following screen will appear:



   - Enter the required information including the Bank Name. For the Branch Name, enter the Bank Routing Number; see **e** above.
   - If known, enter the bank address, see **f** above.

- Select the **Confirm** button to continue.



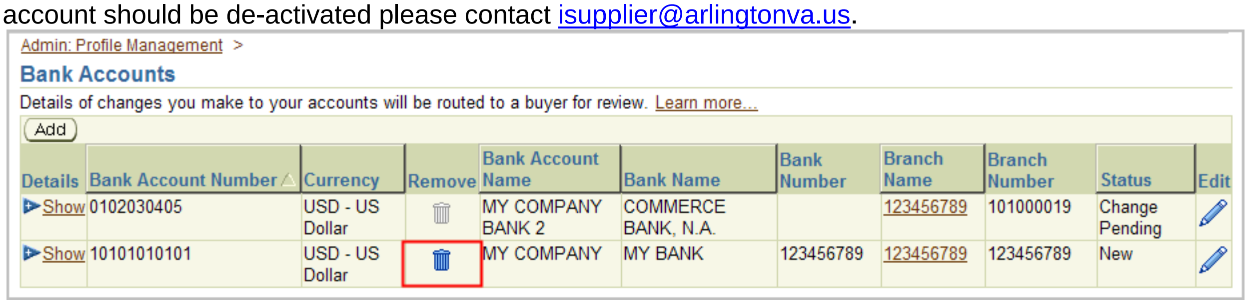
Confirmation

Bank account 10101010101 at the 123456789 branch of MY BANK 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.

2. If the bank account is used by all addresses then select the **All Addresses** checkboxes, see **b** above.
3. If the bank account is used by only specific addresses then select the **Specific Addresses** checkboxes accordingly, see **c** above.
4. Send comments to the administrator by completing the **Notes to Administrator** field, see **d** above.
5. Click the **Apply** button to save your changes.

Remove a Bank Account

The ability to remove a bank account exists only for accounts in New or Reject status. If you believe a bank account should be de-activated please contact isupplier@arlingtonva.us.



Admin: Profile Management >

Bank Accounts

Details of changes you make to your accounts will be routed to a buyer for review. Learn more...

Add

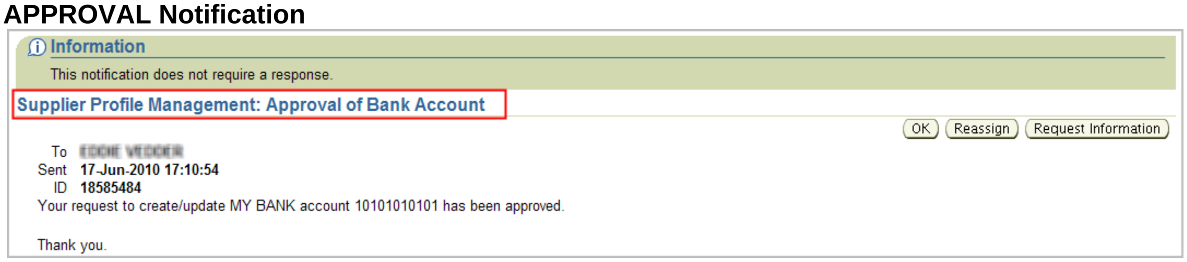
Details	Bank Account Number	Currency	Remove	Bank Account Name	Bank Name	Bank Number	Branch Name	Branch Number	Status	Edit
Show	0102030405	USD - US Dollar		MY COMPANY BANK 2	COMMERCE BANK, N.A.		123456789	101000019	Change Pending	
Show	10101010101	USD - US Dollar		MY COMPANY	MY BANK	123456789	123456789	123456789	New	

To delete a bank account select the **Remove (Trashcan)** icon.

Bank Account Notifications

Once Arlington County reviews and takes action on your bank account request, you will receive one of the following notifications:

APPROVAL Notification



Information

This notification does not require a response.

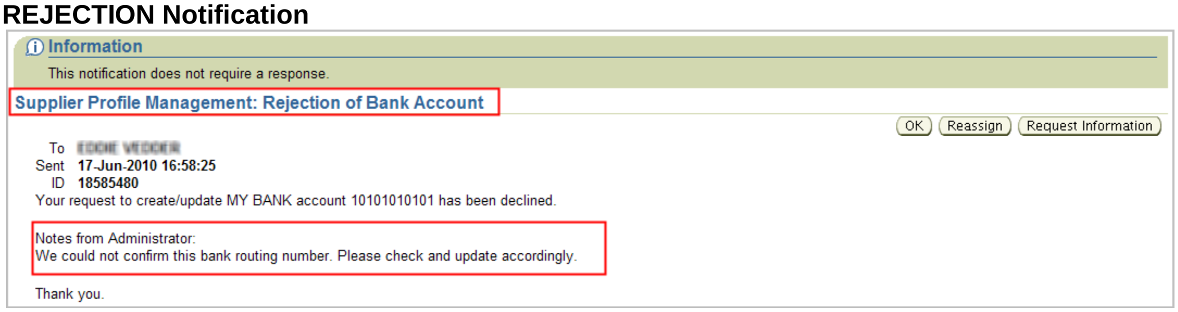
Supplier Profile Management: Approval of Bank Account

OK Reassign Request Information

To [redacted]
Sent 17-Jun-2010 17:10:54
ID 18585484
Your request to create/update MY BANK account 10101010101 has been approved.

Thank you.

REJECTION Notification



Information

This notification does not require a response.

Supplier Profile Management: Rejection of Bank Account

OK Reassign Request Information

To [redacted]
Sent 17-Jun-2010 16:58:25
ID 18585480
Your request to create/update MY BANK account 10101010101 has been declined.

Notes from Administrator:
We could not confirm this bank routing number. Please check and update accordingly.

Thank you.

Lesson 4-5: User Accounts

You can view who from your organization has an iSupplier Portal account with Arlington County through the User Accounts form.

1. **Click the Admin tab and select the User Accounts to open the User Accounts page, see 1 above.**

2. **If a user should no longer have access to iSupplier Portal, please send an email to isupplier@arlingonva.us to request that the account be terminated. Select the click here link, see 2 above, to generate an email from your default email account.**