

Payables Supplier Inquiry User Guide

Oracle Release 12.2

Carnegie Mellon University
Finance Division

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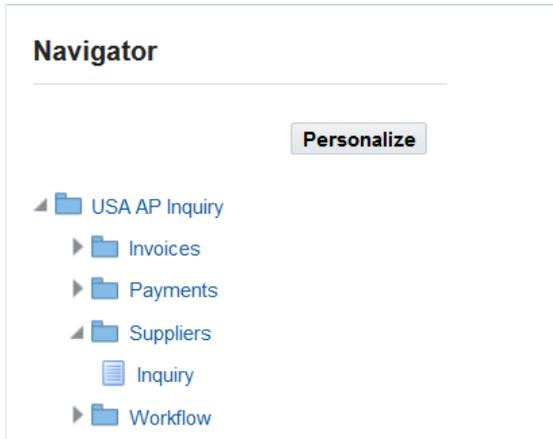
INTRODUCTION

The ability to search for suppliers in the Oracle Financial system is helpful when you need to make purchases on behalf of the university. The Supplier Inquiry function provides important information about suppliers such as if they are set up as a supplier in Oracle, if they are an active supplier (have been used in the last 14 months), if they are designated as a preferred supplier for the university and/or if they have any diversity, equity and inclusion (DEI) characteristics. This document provides you with the steps to take in Oracle to find suppliers and view the characteristics associated with those suppliers.

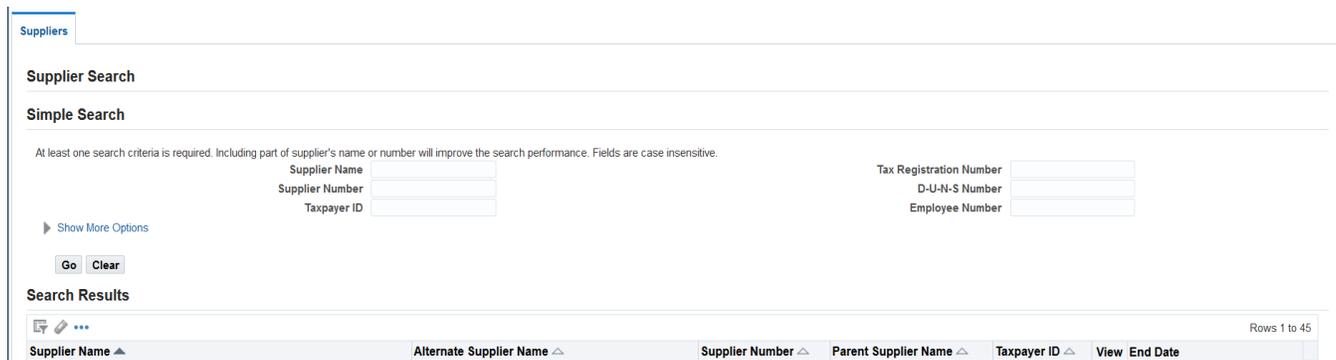
For more information on supplier inquiry, visit the [Finance Training Accounts Payable page](#). Questions about supplier inquiry can be directed to the Business Systems Help Desk at orclhelp@andrew.cmu.edu.

SUPPLIER INQUIRY - SUPPLIER NAME

From the navigator menu, the menu path is **AP Inquiry>Suppliers>Inquiry**.



Selecting this function opens the **Supplier Search** window. This window presents many different pieces of information that can be used to find the supplier or suppliers you are looking for. You can enter criteria in one field or a combination of fields.



The screenshot shows the 'Supplier Search' window. It has a 'Suppliers' tab at the top left. Below the tab is the 'Supplier Search' section, which includes a 'Simple Search' subsection. A note states: 'At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.' There are six input fields: 'Supplier Name', 'Supplier Number', 'Taxpayer ID', 'Tax Registration Number', 'D-U-N-S Number', and 'Employee Number'. Below the fields are 'Go' and 'Clear' buttons. The 'Search Results' section is at the bottom, showing a table header with columns: 'Supplier Name', 'Alternate Supplier Name', 'Supplier Number', 'Parent Supplier Name', 'Taxpayer ID', 'View', and 'End Date'. The text 'Rows 1 to 45' is visible in the bottom right corner.

Example One: Finding a supplier that begins with a certain word

The following steps shows how to complete a simple search by finding all of the suppliers in Oracle that start with Dell.

- Simply type 'dell' in the **Supplier Name** field. The search functionality is not case sensitive.

Suppliers

Supplier Search

Simple Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name

Supplier Number

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Employee Number

[Show More Options](#)

- Click on the **Go** button to perform the search for suppliers whose name begins with 'dell'.
- The **Search Results** region will display with the results of any supplier whose supplier name begins with 'dell'.

Suppliers

Supplier Search

Simple Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name

Supplier Number

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Employee Number

[Show More Options](#)

Search Results

Rows 1 to 25

Supplier Name ▲	Alternate Supplier Name ▲	Supplier Number ▲	Parent Supplier Name ▲	Taxpayer ID ▲	View	End Date
DELL AUSTRALIA PTY LTD		68223		999-99-9999		
DELL FINANCIAL SERVICES		51691		999-99-9999		13-Aug-2014
DELL FINANCIAL SERVICES LLC		144304		999-99-9999		
DELL JAPAN INC		95556		999-99-9999		28-Apr-2013
DELL MARKETING LP		12152		999-99-9999		
DELL STAR TECHNOLOGIES INC		40546		999-99-9999		14-Feb-2007
DELL, GARY		54047		999-99-9999		14-Feb-2007
DELL, ROBERT		17589		999-99-9999		28-Mar-2016
DELL, ZACHARY		132048		999-99-9999		09-Nov-2018
DELLA ROCCA, JASON		87391		999-99-9999		28-Mar-2016

- a. You will see that there are multiple suppliers whose name starts with 'dell'. The search results also provide additional pieces of information. The **Alternate Supplier Name** column will display the 'Doing Business As' name of the supplier, if the supplier provided this as part of the supplier setup information. Other fields in the search results include the **Supplier Number**, the **Parent Supplier Name** (if applicable) and the supplier **Taxpayer ID**. The **End Date** column is populated with a date for those suppliers who are no longer active suppliers in the Oracle database. The **View** icon is used to get to the details about the supplier, which will be demonstrated later in this document.

Example Two: Finding a supplier with a certain word anywhere in their name

The following steps shows how to find all of the suppliers in the Oracle database that have the word 'dell' anywhere in their name.

1. Enter dell with the wildcard character of a percentage sign (%) on either side of the word in the **Supplier Name** field. Using %dell% tells the system that you want to see results for any supplier name that contains the word dell.

The screenshot shows the Oracle Suppliers search interface. At the top left, there is a tab labeled 'Suppliers'. Below it, the 'Supplier Search' section is visible. Underneath, the 'Simple Search' section contains a search criteria instruction: 'At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.' There are three input fields on the left: 'Supplier Name' containing '%dell%', 'Supplier Number', and 'Taxpayer ID'. On the right, there are three input fields: 'Tax Registration Number', 'D-U-N-S Number', and 'Employee Number'. At the bottom left, there is a 'Show More Options' link and two buttons: 'Go' and 'Clear'.

2. Click on the **Go** button  to perform the search.

- The **Search Results** region displays the results of any supplier whose supplier name contains the word 'dell'.

Suppliers

Supplier Search

Simple Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name

Supplier Number

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Employee Number

[Show More Options](#)

Search Results

Supplier Name ▲	Alternate Supplier Name ▲	Supplier Number ▲	Parent Supplier Name ▲	Taxpayer ID ▲	View	End Date
AC DELLOVADE INC		16393		999-99-9999		14-Feb-2007
AHMIDOUCH, ABDELLAH		66490				28-Mar-2016
AMSDELL GROUP LLC	AMSDELL STORAGE VENTURES II DBA COMPASS SELF STORAGE	114446		999-99-9999		09-Nov-2018
ATTIA, ABDELLKADER		162907				
AVDELLAS, JOHN		157832				
BANTAM DOUBLEDAY DELL		12071		999-99-9999		14-Feb-2007

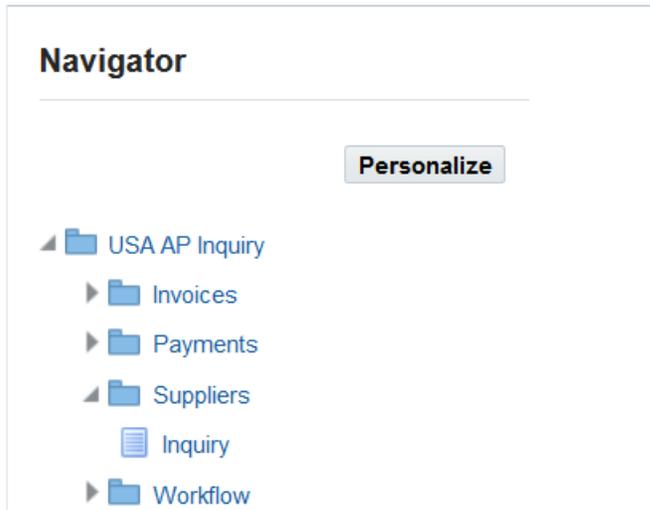
Rows 1 to 45

SUPPLIER INQUIRY – ALTERNATE SUPPLIER NAME SEARCH (E.G., DOING BUSINESS AS)

Suppliers in the Oracle database may have an official supplier name that is not as familiar to users as their 'Doing Business As' name. For example, searching for 'Sam's Club' as a supplier in the Oracle database, will not return any results and may cause the user to think that Sam's Club is not in the Oracle supplier database. However, if you enter 'Sams Club' in the Alternate Supplier Name search field, the results will show that the official Supplier Name for Sam's Club is GE Capital Financial Services Inc.

The following steps shows how to search for a supplier in the Oracle supplier database using the Alternate Supplier Name field.

1. From the navigator menu, the menu path is **AP Inquiry>Suppliers>Inquiry**.



2. When the **Supplier Search** window opens, find the  link in the bottom left portion of the Simple Search area and click on it to expand the search criteria. You will see many more fields of information that can be used when searching for a supplier(s). Keep in mind, the more criteria you enter the narrower your search becomes.

Suppliers

Supplier Search

Simple Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name	<input type="text"/>	Tax Registration Number	<input type="text"/>
Supplier Number	<input type="text"/>	D-U-N-S Number	<input type="text"/>
Taxpayer ID	<input type="text"/>	Employee Number	<input type="text"/>

[Hide More Options](#)

Supplier Details	Business Classifications
Alternate Supplier Name <input type="text"/>	
Inactive Date From <input type="text" value="(21-Dec-2020)"/> To <input type="text" value="(21-Dec-2020)"/>	
One Time <input type="checkbox"/>	
Supplier Type <input type="text"/>	
Parent Supplier Name <input type="text"/>	
Parent Supplier Number <input type="text"/>	
Payment Priorities From <input type="text"/> To <input type="text"/>	
Reporting Name <input type="text"/>	
Payment Terms <input type="text"/>	
Pay Group <input type="text"/>	
Federal Reportable <input type="checkbox"/>	
Income Tax Type <input type="text"/>	
State Reportable <input type="checkbox"/>	

Site Details

- In the **Alternate Supplier Name** field, enter '%hilton%' to search for all supplier names that contain Hilton.

Suppliers

Supplier Search

Simple Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name

Supplier Number

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Employee Number

[Hide More Options](#)

Supplier Details

Alternate Supplier Name

Inactive Date From To

One Time

Supplier Type

Parent Supplier Name

Parent Supplier Number

Payment Priorities From To

Reporting Name

Payment Terms

Pay Group

Federal Reportable

Income Tax Type

State Reportable

Business Classifications

Site Details

- Click on the **Go** button to perform the search.

- The **Search Results** region displays all of the suppliers in the database who do business with an alternate supplier name that includes the word 'hilton'.

Search Results

Rows 1 to 39

Supplier Name	Alternate Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	View	End Date
1001 MARQUETTE LLC	HILTON MINNEAPOLIS	88155		999-99-9999		16-Oct-2012
ACC HOSPITALITY LESSEE LLC	DBA HILTON ATLANTA BY HILTON MANAGEMENT LLC	125578		999-99-9999		09-Nov-2018
AMSTAR/DAVIDSON ROBLES LLC	HILTON PASADENA	91552		999-99-9999		16-Oct-2012
APPLE NINE HOSPITALITY MANAGEMENT INC	dba HILTON GARDEN INN NASHVILLE VANDERBILT, HAMPTON INN UNIVERSITY CENTER	84793		999-99-9999		11-Dec-2017
AREP II GH HOTEL HOLDING LLC	DBA HILTON UNIV OF FLORIDA CONFERENCE CTR GAINESVILLE	141866		999-99-9999		09-Nov-2018
ASHA HOSPITALITY INC	HILTON GARDEN INN	89602		999-99-9999		16-Oct-2012
ASHFORD TRS LESSEE II LLC	HILTON ST PETERSBURG BAYFRONT	103448		999-99-9999		16-Jun-2015
CAMINO REAL GROUP LLC	HILTON GARDEN INN MOUNTAIN VIEW	87240		999-99-9999		27-May-2014
CHIEF PORTLAND HOTELS LLC	HILTON PORTLAND & EXECUTIVE TOWER	107662		999-99-9999		09-Nov-2018

Note: When creating an Oracle purchase order (PO), the Supplier Name is what will be available in the list of values on the PO form. The Alternate Supplier Name will not display or be available in the list of value to choose.

VIEWING SUPPLIER DETAILS

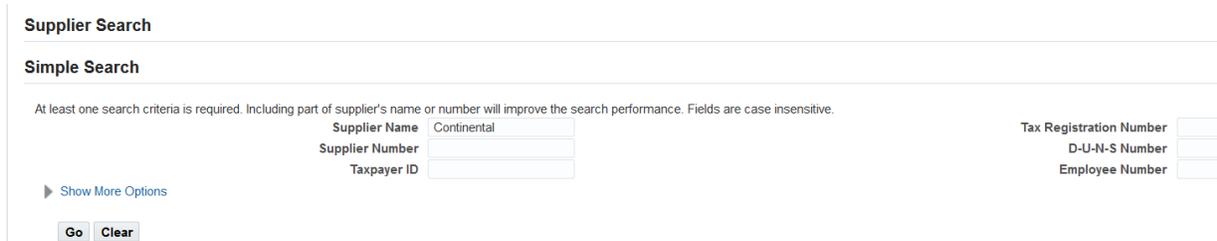
This section will discuss how to access the details associated with a supplier.

1. To do this, use the View icon (if your search results in multiple suppliers) or go directly into the supplier record (if your search finds one specific supplier).
2. From the navigator menu, the menu path is **AP Inquiry>Suppliers>Inquiry**.



Example One: Viewing supplier details (Continental Office Environments)

1. To view the supplier details for Continental Office Environments, enter 'Continental' in the **Supplier Name** field on the **Supplier Search** window in the Simple Search region.



The image shows a 'Supplier Search' window. The 'Simple Search' section is active. It contains a note: 'At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.' Below this are three input fields: 'Supplier Name' (containing 'Continental'), 'Supplier Number', and 'Taxpayer ID'. To the right are three more input fields: 'Tax Registration Number', 'D-U-N-S Number', and 'Employee Number'. At the bottom left, there is a 'Show More Options' link and 'Go' and 'Clear' buttons.

2. Click on the **Go** button  to perform the search.

- The **Search Results** region displays all of the suppliers in the database whose name begins with 'Continental'.

Search Results

Supplier Name ▲	Alternate Supplier Name ▲	Supplier Number ▲	Parent Supplier Name ▲	Taxpayer ID ▲	View	End Date
CONTINENTAL AIRLINES INC HQJRF		98239		999-99-9999		28-Mar-2016
CONTINENTAL AUTOMOTIVE GMBH		167386		999-99-9999		
CONTINENTAL BROADBAND LLC		166539		999-99-9999		
CONTINENTAL BROADBAND PENNSYLVANIA	EXPEDIENT COMMUNICATIONS LLC	67004				28-Mar-2016
CONTINENTAL CATERERS		49027		999-99-9999		14-Feb-2007
CONTINENTAL LAB PRODUCTS		28325		999-99-9999		14-Feb-2007
CONTINENTAL LAUNDRY SYSTEMS		72259		999-99-9999		20-Jun-2009
CONTINENTAL OFFICE FURNITURE CORPORATION		28145		999-99-9999		

- Locate Continental Office Furniture Corporation, is in the **Search Results**. At this point you can click on the **View** icon  to go to the supplier's **Quick Update** screen and drill into the details of the supplier record.

- Alternatively, you could enter 'Continental Office' in the **Supplier Name** field in the **Simple Search** region, which narrows down the search results and automatically takes you to the supplier's **Quick Update** screen where you can drill into the details of the supplier record.
 - Note: while in the Simple Search inquiry screen, you are not able to update the payment type.

Suppliers >

Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Quick Update

* Indicates required field

Supplier Name	CONTINENTAL OFFICE FURNITURE CORPORATION	Purchase Order Hold	<input type="checkbox"/> All New Orders
Supplier Number	28145	Hold from Payment	<input type="checkbox"/> All Invoices
Alternate Supplier Name			<input type="checkbox"/> Unmatched Invoices
Registry ID	157937		<input type="checkbox"/> Unvalidated Invoices
Inactive Date			
Alias			

Supplier Sites

Site Status: Active Site Name: Operating Unit:

Key Purchasing Setups | Key Payment Setups

Site Name	Operating Unit	Ship-To Location	Bill-To Location	* Selling Company Identifier	Country of Origin
2735 RAILROAD	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
322 NORTH SHORE	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
4801 GRAND AVE	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
COLUMBUS2	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
HOMESTEAD2	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		
L-3569 COLUMBUS	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
PITTSBURGH	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States

The following lists the details that you can find on the supplier's **Quick Update** screen, which provides summary information about the supplier and the supplier's site(s).

1. The top portion of the **Quick Update** screen displays information about the supplier as a whole – the **Supplier Name, Supplier Number, Alternate Supplier Name, Registry ID, Inactive Date** (if applicable) and **Alias** (if applicable). You can also see if the university has placed and holds on this supplier. The **Purchase Order Hold** prevents new PO's from being created for the supplier and the **Hold from Payment** prevents payments from being made to the supplier.

Suppliers >
Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Quick Update

* Indicates required field

Supplier Name	CONTINENTAL OFFICE FURNITURE CORPORATION	Purchase Order Hold	<input type="checkbox"/> All New Orders
Supplier Number	28145	Hold from Payment	<input type="checkbox"/> All Invoices
Alternate Supplier Name			<input type="checkbox"/> Unmatched Invoices
Registry ID	157937		<input type="checkbox"/> Unvalidated Invoices
Inactive Date			
Alias			

2. The **Supplier Sites** region displays the different supplier sites that have been created for the supplier. The sites that are displayed by default 'Active', but the **Site Status** can be changed to show Inactive sites if needed.
3. The **Key Purchasing Setups** tab displays information that was chosen or selected when the site was created as a purchasing site. The **Bill-To Location** is set to Accounts Payable to ensure that the supplier's invoices are sent directly to the university's Accounts Payable office for faster processing.

Supplier Sites

Site Status: Active | Site Name: | Operating Unit: | Go

Key Purchasing Setups | Key Payment Setups

Site Name	Operating Unit	Ship-To Location	Bill-To Location	* Selling Company Identifier	Country of Origin
2735 RAILROAD	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
322 NORTH SHORE	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
4801 GRAND AVE	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
COLUMBUS2	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
HOMESTEAD2	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
L-3569 COLUMBUS	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States
PITTSBURGH	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		United States

- The information on the **Key Payment Setups** tab was chosen or selected when the site was created. On this tab, you can quickly see information such as the **Invoice Currency, Pay Group, Payment Terms** (used to calculate the date of payment), **Pay Date Basis** and **Always Take Discount** (indicates whether or not a discount provided by the supplier will be taken).

Supplier Sites

Site Status Active Site Name Operating Unit

Key Purchasing Setups **Key Payment Setups**

Site Name	Operating Unit	Invoice Tolerance	Invoice Match Opti...	Invoice Curren...	Payment Curren...	Pay Group	Terms	Terms Date Ba...	Pay Date Ba...	Always Take Disco...
2735 RAILROAD	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>
322 NORTH SHORE	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>
4801 GRAND AVE	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>
COLUMBUS2	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>
HOMESTEAD2	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order		US dollar	A-F SUPPLIERS	NET ...	Invoice	Due	<input checked="" type="checkbox"/>
L-3569 COLUMBUS	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>
PITTSBURGH	CM OPERATING UNIT ORGANIZATION	PO Matching Tolerance	Purchase Order	US dollar	US dollar	A-F SUPPLIERS	NET ...	Invoice	Discount	<input checked="" type="checkbox"/>

- If you are looking for a particular site and you don't see it displayed as an active site, try changing the **Site Status** selection to '**Inactive**' and then click on the **Go** button to see if the site is currently inactive.

Supplier Sites

Site Status Active Inactive Site Name Operating Unit

- Looking at the results, you can see that there are sites for Continental Office Furniture Corporation that are currently marked as 'Inactive' which means that these sites are not available for Purchasing or for Payment.

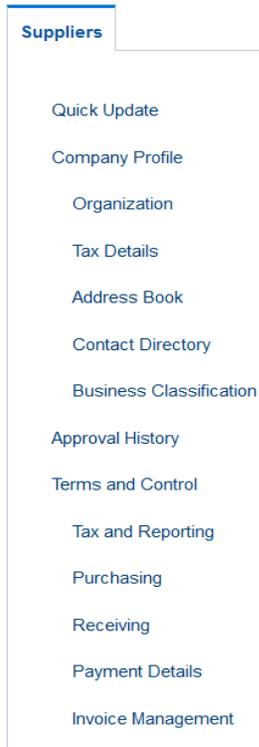
Supplier Sites

Site Status Active Inactive Site Name Operating Unit

Key Purchasing Setups **Key Payment Setups**

Site Name	Operating Unit	Ship-To Location	Bill-To Location	* Selling Company Identifier
COLUMBUS	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE	
HOMESTEAD	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE	

7. In the left-hand margin of the **Quick Update** screen, there is a **Suppliers** menu of additional information that is available for the supplier. This document will not review all of the information that is available, but instead will focus on the information that is most likely to be helpful to someone inquiring on a supplier to make a purchase.



8. From the **Suppliers** menu, click on **Organization** to view the supplier's organization information.

Suppliers >

Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Organization

* Indicates required field

Supplier Name	CONTINENTAL OFFICE FURNITURE CORPORATION	Parent Supplier Name	
Supplier Number	28145	Parent Supplier Number	
Alternate Supplier Name		Customer Number	
SIC		<input type="checkbox"/> One Time	
National Insurance Number		Inactive Date	
Type	Small - Corporation		

Global Details

Context Value

Additional Information

Preferred Vendor	Yes
On EPLS/OFAC List?	N
	No
Utility	
ANC & INDIAN TRIBES NON-SDB	
W-9/W-8?	Yes
Service Disabled Veteran Owned	
HubZone	
Veteran-owned	
Inactive Date Reason	
HBCU & MI	
ANC & INDIAN TRIBES N-CERT SDB	No

Supplier URL Details

URL

Tax and Financial Information

Taxpayer ID	31-4413238	Currency Preference	
Tax Registration Num		VAT Number:	
		<input type="checkbox"/> Federal Agency	

- a. The **Organization** screen header provides some of the same information that was on the previously reviewed Quick Update screen such as the **Supplier Name, Supplier Number, Alternate Supplier Name** and **Inactive Date**. The **Type** field in the header region is provided by the supplier and is used by CMU for reporting purposes.
- b. Under the **Global Details** section, the **Additional Information** region provides characteristics about the supplier that are requested on the Supplier Setup Form during supplier entry.
 1. The **Preferred Vendor** status to indicate whether the supplier is a preferred supplier for the university.

2. There are also several indicators for the supplier's small/minority owned business status that the university uses for reporting purposes and to help meet diversity, equity and inclusion (DEI) purchasing goals.

c. The **Tax and Financial Information** region of this screen is where you'll find the **Taxpayer ID** number.

9. To view the supplier's address information, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Address Book** [Address Book](#) menu.

Suppliers >
Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Address Book

Search

Address Name Site Name
 Address Details Purpose

Go **Clear**

Details	Name ▲	Address	Country ▲	Communication	Purpose ▲	Status ▲	Update
▶	2735 RAILROAD	2735 RAILROAD ST PITTSBURGH, PA 15222	United States		Purchasing	Current	
▶	322 NORTH SHORE DR	322 NORTH SHORE DR SUITE 300 PITTSBURGH, PA 15212	United States		Purchasing	Current	
▶	4801 GRAND AVE	4801 GRAND AVE PITTSBURGH, PA 15225	United States		Pay, Purchasing	Current	
▶	COLUMBUS	2601 SILVER DRIVE PO BOX 29908 COLUMBUS, OH 43229-7508	United States		Pay, Purchasing	Current	
▶	COLUMBUS2	5081 FREEWAY DRIVE EAST COLUMBUS, OH 43229	United States		Pay, Purchasing	Current	
▶	HOMESTEAD	285 E WATERFRONT DR STE 100 HOMESTEAD, ALLEGHENY, PA 15120	United States	Phone: 412 464-2500 Fax: 412 464-2525	Pay, Purchasing	Current	
▶	HOMESTEAD2	700 E WATERFRONT, STE 107 HOMESTEAD, PA 15120	United States	Phone: 412 464-2500	Pay, Purchasing	Current	
▶	L-3569 COLUMBUS	L-3569 COLUMBUS, OH 43260-3569	United States		Pay, Purchasing	Current	
▶	PITTSBURGH	5149 BUTLER ST PITTSBURGH, PA 15201	United States		Pay, Purchasing	Current	
▶	PO BOX 29908	PO BOX 29908 COLUMBUS, OH 43229	United States		Pay, Purchasing	Current	
▶	TURTLECREEK	230 BRADDOCK AVE TURTLE CREEK, ALLEGHENY, PA 15145	United States	Phone: 412 829-2108 Fax: 412 829-8974	Pay	Current	

4. On the **Address Book** screen, in the top portion, you have the option to search for a specific address that is associated with the supplier. However, even without performing a search, all of the supplier's active addresses appear below by default. Each supplier address location is defined with a **Name, Address, Country, Communication, Purpose** and **Status**.

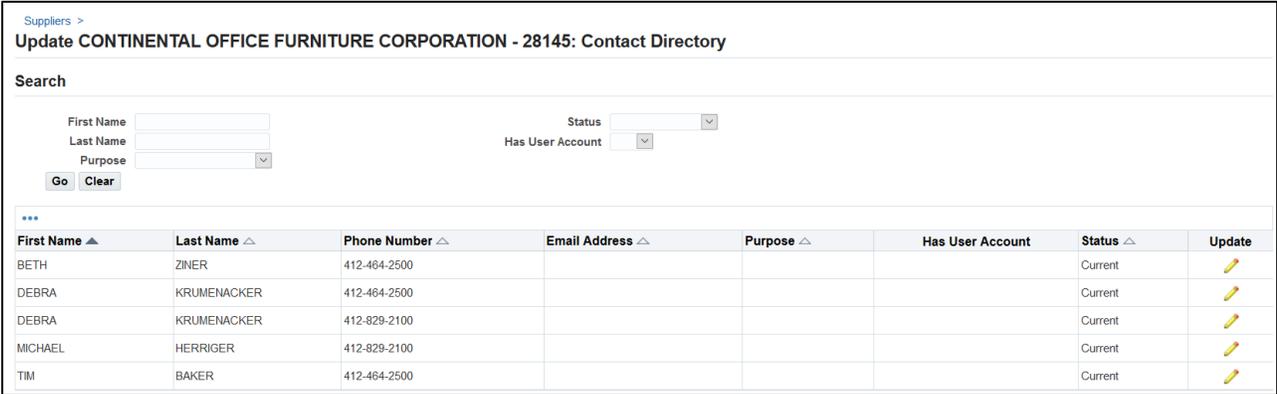
- a. The  arrow allows you to see the supplier site(s) that have been assigned to a particular address. At CMU, there is generally a one-to-one relationship between an Address and a Supplier Site. Click the  arrow for the Address Name of 'COLUMBUS'.

▲	COLUMBUS	2801 SILVER DRIVE PO BOX 29908 COLUMBUS, OH 43229-7508	United States	Pay, Purchasing	Current	
Sites Using the Address						
Site Name ▲		Operating Unit ▲		Communication		Purpose
COLUMBUS		CM OPERATING UNIT ORGANIZATION				<input checked="" type="checkbox"/> Purchasing <input checked="" type="checkbox"/> Payment <input type="checkbox"/> RFQ Only

- b. The COLUMBUS address has one site associated with it that is under the CM Operating Unit Organization and the **Purpose** shows that this site can be used during purchase order creation and for payment processing.
- c. To find any Inactive Address and/or Site information, click on **▶ Inactive Addresses** that appears directly below the Active Addresses results region. In this example, there no Addresses or Sites have been made inactive for this supplier.

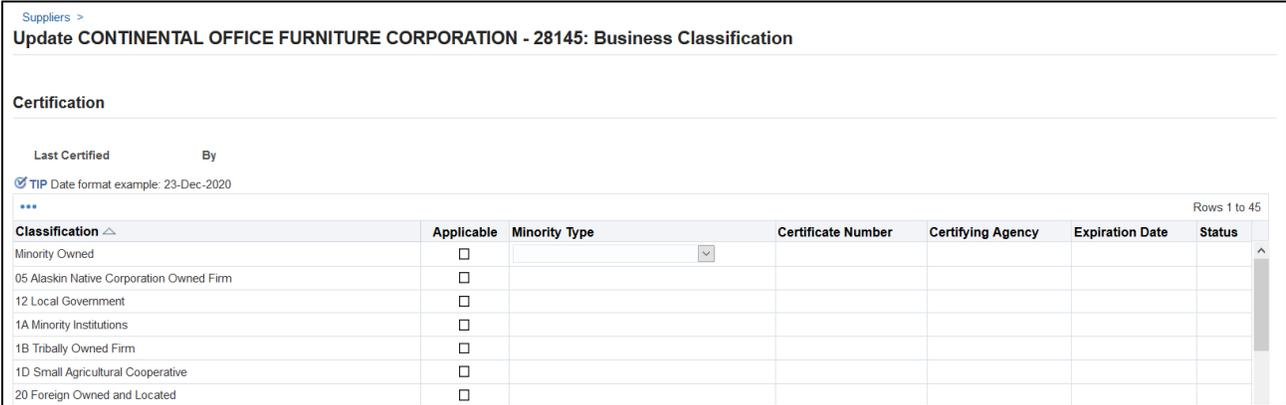
▲ Inactive Addresses					
...					
Details	Name	Address	Country	Communication	Purpose
	No results found.				

10. To view the supplier’s contact information, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Contact Directory** [Contact Directory](#) menu.



a. The **Contract Directory** provides the contact **First Name**, **Last Name** and **Phone Number** that was provided by the supplier.

11. To view the supplier’s business classification, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Business Classification** [Business Classification](#) menu.



Note: This screenshot does not contain the full list of classification.

a. The supplier we are reviewing, Continental Office Furniture Corporation, does not have any applicable business classifications. However, if a supplier does meet any of the available classifications there would be a check mark in the **Applicable** column. These classifications assist the university in reporting to the interested agencies about our supplier base, meeting the goals of the

supplier diversity program and supporting overall diversity, equity and inclusion initiatives.

12. To view more information about the supplier’s purchasing sites, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Purchasing** [Purchasing](#) menu.

Suppliers >
Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Purchasing

Purchase Order Hold All New Orders
 Create Debit Memo from RTS Transaction

Supplier Sites

Site Status Site Name Operating Unit

Purchasing | [Self Billing](#) | [Freight](#)

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Ship Via	Acknowledgment Lead Time (Days)
COLUMBUS	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		
HOMESTEAD	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		
PO BOX 29908	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		
TURTLECREEK	CM OPERATING UNIT ORGANIZATION		ACCOUNTS PAYABLE		

- a. The information in the **Purchasing** area, such as the **Site Name**, **Operating Unit**, and **Bill-To Location** is also found on the **Quick Update** screen. Due to the nature of the business the university conducts, the **Self Billing** and **Freight** information does not apply.

13. To view the supplier’s receiving information, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Receiving** [Receiving](#) menu.

Suppliers >
Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Receiving

Enforce Ship-To Location	None	Days Early Receipt Allowed	100
Receipt Routing	Requires: Direct receipt	Days Late Receipt Allowed	100
Match Approval Level	3-Way	<input type="checkbox"/> Allow Substitute Receipts	
Quantity Received Tolerance	100	<input type="checkbox"/> Allow Unordered receipts	
Quantity Received Exception	None	Receipt Date Exception	None

- a. The **Match Approval Level** may show a default value of ‘3-Way’. Which means that the PO shipment, receipt, and invoice quantities must match in the system in order for payment to the vendor to be processed.
- b. **Note:** Depending on when the supplier was created in Oracle, the receiving setup information may not be visible within the Supplier Inquiry view.

Suppliers >

Update ZOE'S PLAYGROUND - 168246: Receiving

Enforce Ship-To Location	Days Early Receipt Allowed
Receipt Routing	Days Late Receipt Allowed
Match Approval Level	<input type="checkbox"/> Allow Substitute Receipts
Quantity Received Tolerance	<input type="checkbox"/> Allow Unordered receipts
Quantity Received Exception	Receipt Date Exception

14. To view the supplier's selected payment method, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Payment Details** [Payment Details](#) menu.

- a. The **Payment Details** section at the top of the screen contains information that is specific to the supplier record and includes the **Default** field which indicates the suppliers' selected **Payment Method**.

Suppliers >

Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Payment Details

Payment Details

▲ **Payment Methods**

TIP You can choose one payment method to default on documents for the payee. A default payment method is optional.

Payment Method	Default	End Date
ANZ AP CHECKPAY	<input type="checkbox"/> Default	
Check	<input checked="" type="checkbox"/> Default	
Comcheck Payment method	<input type="checkbox"/> Default	
Electronic	<input type="checkbox"/> Default	
Outsourced Check	<input type="checkbox"/> Default	
Wire	<input type="checkbox"/> Default	

Payment Attributes

[Payment Delivery Attributes](#) | [Payment Specifications](#) | [Separate Remittance Advice Delivery](#)

Service Level	Settlement Priority
Remittance Method	Payment Text Message 1
Payment Format	Payment Text Message 2
Transaction Handling	Payment Text Message 3
Bank Instruction Details	

Supplier Sites

Site Status Site Name Operating Unit

Site Name	Operating Unit	Update Payment Details
COLUMBUS	CM OPERATING UNIT ORGANIZATION	
HOMESTEAD	CM OPERATING UNIT ORGANIZATION	
PO BOX 29908	CM OPERATING UNIT ORGANIZATION	
TURTLECREEK	CM OPERATING UNIT ORGANIZATION	

- b. The bottom portion of the Payment Details screen, **Supplier Sites**, is where the type of payment method is defined for each site. Click on the **Update**

Payment Details pencil icon,  to see (but not update) the site payment information.

Suppliers > Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Payment Details >

Payment Details: PO BOX 29908 (CM OPERATING UNIT ORGANIZATION) Cancel

Payment Details

Payee Name CONTINENTAL OFFICE FURNITURE CORPORATION Internal Organization CM OPERATING UNIT ORGANIZATION
 Payee Site PO BOX 29908 Supplier Site Name PO BOX 29908

Payment Methods

 TIP You can choose one payment method to default on documents for the payee. A default payment method is optional.

Payment Method	Default	End Date
ANZ AP CHECKPAY	<input type="checkbox"/> Default	
Check	<input type="checkbox"/> Default	
Comcheck Payment method	<input type="checkbox"/> Default	
Electronic	<input checked="" type="checkbox"/> Default	
Outsourced Check	<input type="checkbox"/> Default	
Wire	<input type="checkbox"/> Default	

Payment Attributes

Payment Delivery Attributes Payment Specifications Separate Remittance Advice Delivery

Service Level	Settlement Priority
Remittance Method	Payment Text Message 1
Payment Format PPD (e-Commerce Gateway)	Payment Text Message 2
Transaction Handling Make Payment Only (e-Commerce Gateway)	Payment Text Message 3
Bank Instruction Details	

- c. The **Payment Details** screen associated with the **Supplier Site** chosen displays. Here you can see the default type of payment that the payment site accepts.

15. To view the supplier's invoice management information, go back to the **Suppliers** menu in the left-hand margin of the **Organization** screen and click on the **Invoice Management** [Invoice Management](#) menu.

Update CONTINENTAL OFFICE FURNITURE CORPORATION - 28145: Invoice Management

Invoice Currency
 Invoice Amount Limit
 Invoice Match Option Purchase Order

Hold from Payment All Invoices
 Unmatched Invoices
 Unvalidated Invoices

Invoice Payment Terms

Payment Currency USD
 Payment Priority 99
 Terms NET 30
 Terms Date Basis Invoice
 Pay Date Basis Due

Pay Group A-F SUPPLIERS
 Always Take Discount
 Exclude Freight From Discount
 Create Interest Invoice

Supplier Sites

Site Status Inactive Site Name Operating Unit Go

Invoicing Payment Terms Supplier Preferences

Site Name	Operating U...	Invoice Amount Li...	Invoice Toleran...	Invoice Match Opti...	Invoice Curren...	Hold from Payment			Payment Hold Reas...	Services Toleran
						All Invoic...	Unmatched Invoic...	Unvalidated Invoic...		
COLUMBUS	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
HOMESTEAD	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
PO BOX 28908	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
TURTLECRE...	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

a. The **Invoice Management** screen is where you can find additional details about how the university processes the invoices received from the supplier. Some of the information that is found on the **Quick Update** screen is also found here. Here again, the screen is split into several regions.

1. The top header region allows for options and settings to be established for the supplier, and they take effect as the default for the supplier sites. Here you can see if certain pieces of information, such as the **Invoice Currency, Invoice Amount Limit, Invoice Match Option** and **Hold from Payment**, have been defined for the supplier record.
2. The Invoice Payment Terms section where you can find information about the Payment Currency, Payment Priority, Terms, Terms Data Basis, Pay Date Basis and Pay Group.
3. The bottom **Supplier Sites** region is where you can see the way that each site has been setup and has tabs for **Invoicing, Payment, Terms** and **Supplier Preferences**.

- The default **Invoicing** tab region shows the invoicing information for each site. Sites may have different invoice currencies or hold from payment indicators.

Site Name	Operating U...	Invoice Amount LI...	Invoice Toleran...	Invoice Match Opti...	Invoice Curren...	Hold from Payment			Payment Hold Reas...	Services Toleran
						All Invoic...	Unmatched Invoic...	Unvalidated Invoic...		
COLUMBUS	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
HOMESTEAD	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
PO BOX 29908	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
TURTLECRE	CM OPERATING UNIT ORGANIZATION		PO Matching Tolerance	Purchase Order		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

- The **Payment** tab region shows information such as **Payment Currency** and **Pay Group** for each supplier site.

Supplier Sites

Site Status: Inactive | Site Name: _____ | Operating Unit: _____ |

Site Name	Operating Unit	Payment Currency	Payment Priority	Pay Group	Deduct Bank Charge from Payment
COLUMBUS	CM OPERATING UNIT ORGANIZATION	USD	99	A-F SUPPLIERS	No
HOMESTEAD	CM OPERATING UNIT ORGANIZATION	USD	99	A-F SUPPLIERS	No
PO BOX 29908	CM OPERATING UNIT ORGANIZATION	USD	99	A-F SUPPLIERS	No
TURTLECREEK	CM OPERATING UNIT ORGANIZATION		99	A-F SUPPLIERS	No

- The **Terms** tab region is where you can see **Payment Terms**, **Term Date Basis**, **Pay Date Basis**, and **Always Take Discount** information across supplier sites.

Supplier Sites

Site Status: Inactive | Site Name: _____ | Operating Unit: _____ |

Site Name	Operating Unit	Terms	Terms Date Basis	Pay Date Basis	Retainage Rate (%)	Always Take Discount	Exclude Freight From Discount
COLUMBUS	CM OPERATING UNIT ORGANIZATION	NET 30	Invoice	Due		<input checked="" type="checkbox"/>	<input type="checkbox"/>
HOMESTEAD	CM OPERATING UNIT ORGANIZATION	NET 30	Invoice	Due		<input checked="" type="checkbox"/>	<input type="checkbox"/>
PO BOX 29908	CM OPERATING UNIT ORGANIZATION	NET 30	Invoice	Due		<input checked="" type="checkbox"/>	<input type="checkbox"/>
TURTLECREEK	CM OPERATING UNIT ORGANIZATION	NET 30	Invoice	Due		<input checked="" type="checkbox"/>	<input type="checkbox"/>

This concludes the Payables Supplier Inquiry User Guide. For more information on supplier inquiry, visit [the Finance Training Accounts Payable page](#). Questions about supplier inquiry can be directed to the Business Systems Help Desk at orclhelp@andrew.cmu.edu.