eSupplier Connection

Manual

Supply Management

October 2016

Rev. 04

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I. eSupplier Connection Overview

eSupplier Connection is a tool for suppliers to manage their accounts such as change of address and add new users, and to view their PO's, receipts, invoices, and payments in real time. Through the online portal, suppliers can view purchase order details, receiving information, and research outstanding payments without having to contact someone directly.

II. Work Instructions

A. Getting Started

1. Log In

a) Go to www.lcra.org

b) Click on the **About** tab at the top

c) In the navigation to the left, click **Business Opportunities with LCRA.**

d) Click **Supplier Connection**

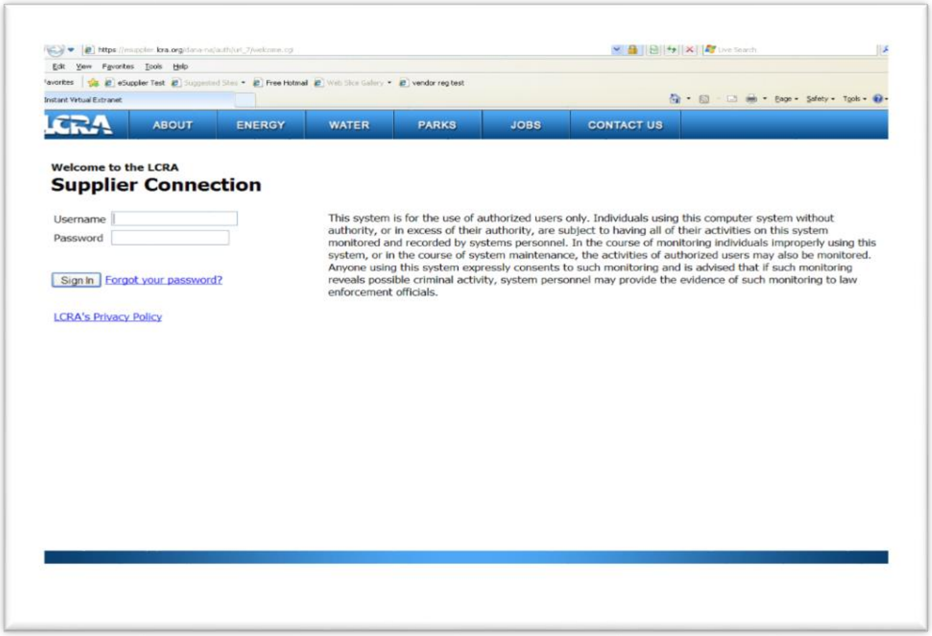
e) Click **Manage Your Account button**

NOTE: If you are experiencing issues getting to the log in site, you can go directly to https://esupplier.lcra.org.

f) The **Supplier Connection** login page will open.

g) Enter your username and password and click **Sign In**

NOTE: If you forgot your username and password, click on the link **Forgot your password?** and follow the process.

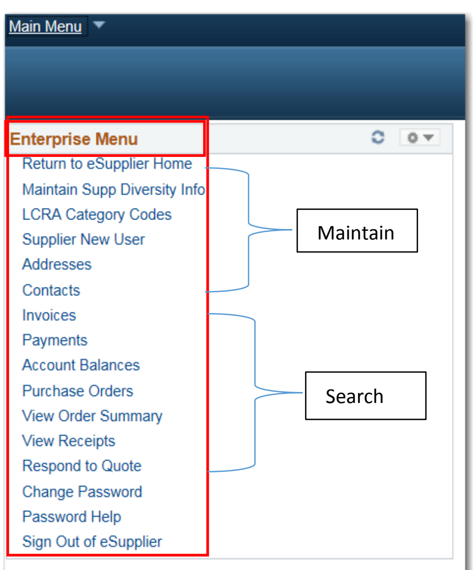


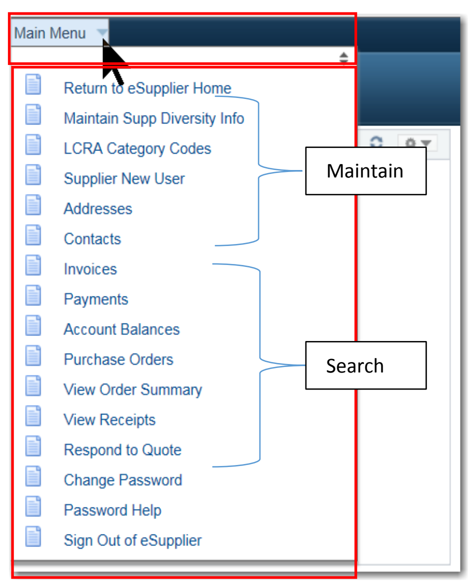
B. Navigating Through eSupplier Connection

Navigation for eSupplier can be accessed from two locations:

- **Navigation panel (Enterprise Menu)** to the left, or,
- **Main Menu** drop down in the top left corner

These provide the same options for suppliers to **maintain** their accounts (upper section), and options to **search** information about their accounts (lower section).





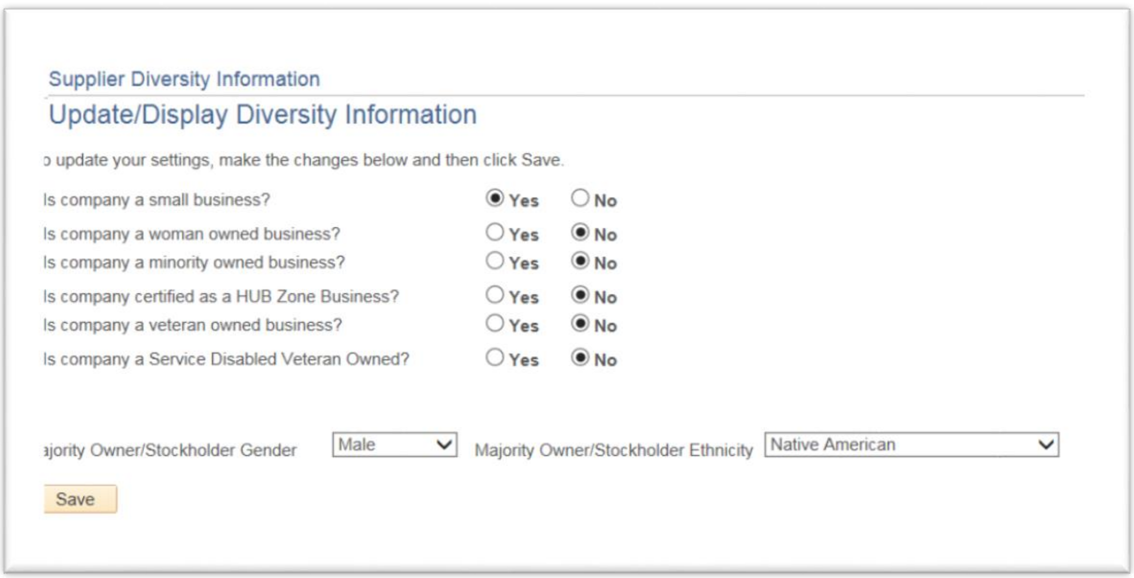
Breadcrumbs appear across the top of the page for navigation. Use these to return to the previous area or Main Menu rather than using the back-button.

C. Maintain Information

1. Maintain Supplier Diversity Info

a) Click **Maintain Supp Diversity Info** link in the Navigation to the left.

b) Update your settings related to diversity and click **Save**.

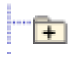


2. LCRA Category Codes

a) Select **LCRA Category Codes** link from the navigation to the left

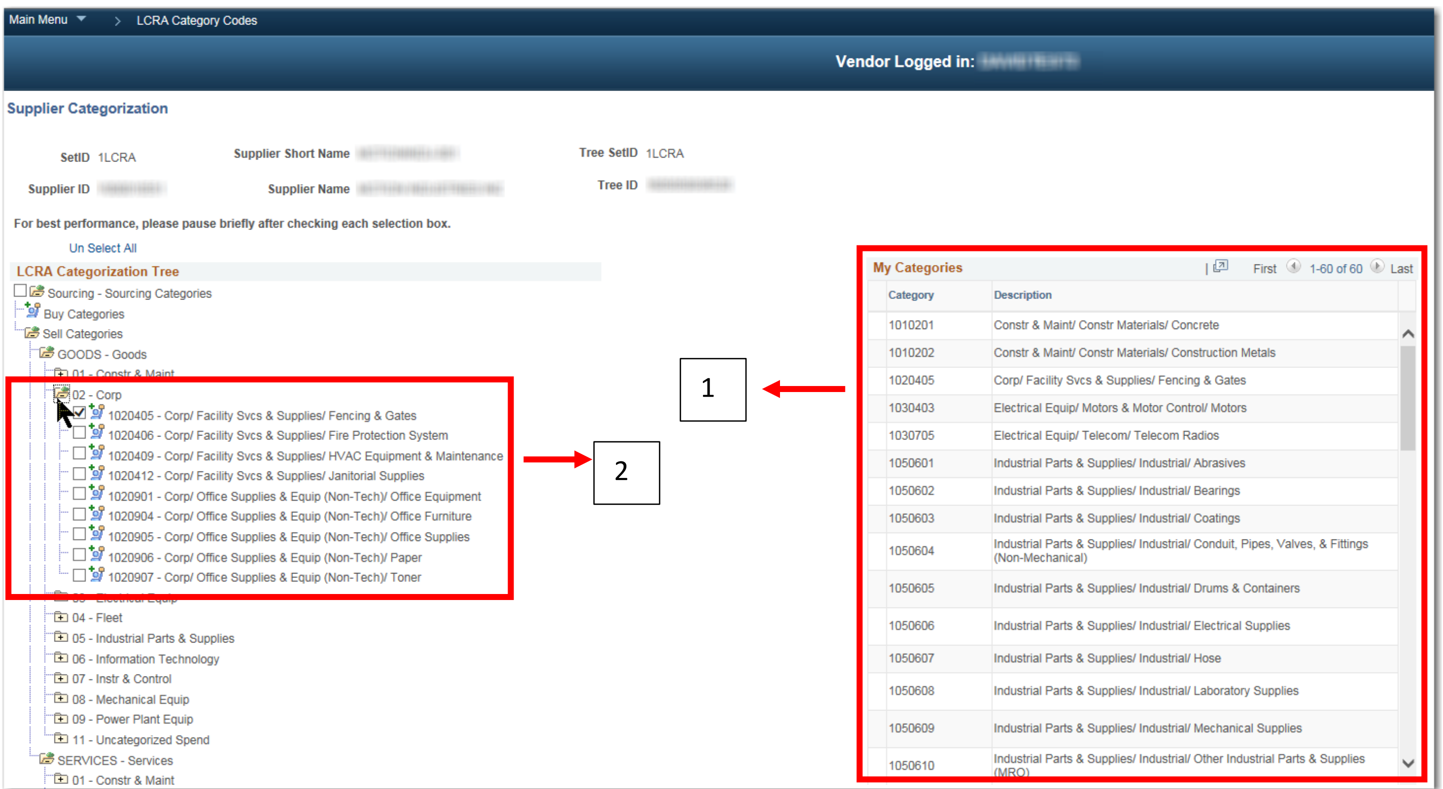
b) Click **Categorization**

c) Review **My Categories** (1) to the right for categories associated with your business

d) Select  next to the appropriate folder to the left to expand options (2)

e) Select the appropriate options – they appear in your My Categories list.

f) Click **OK** (scroll to bottom of page) and **Save** (on the next page) to save changes.



3. Supplier New User

This allows adding additional users to supplier accounts. Requirements: Suppliers need to know their LCRA Supplier ID and Tax ID to create a new user; limit ten characters on User ID; an error will occur if this information is already in the system.

a) Select **Supplier New Users** link from the navigation to the left

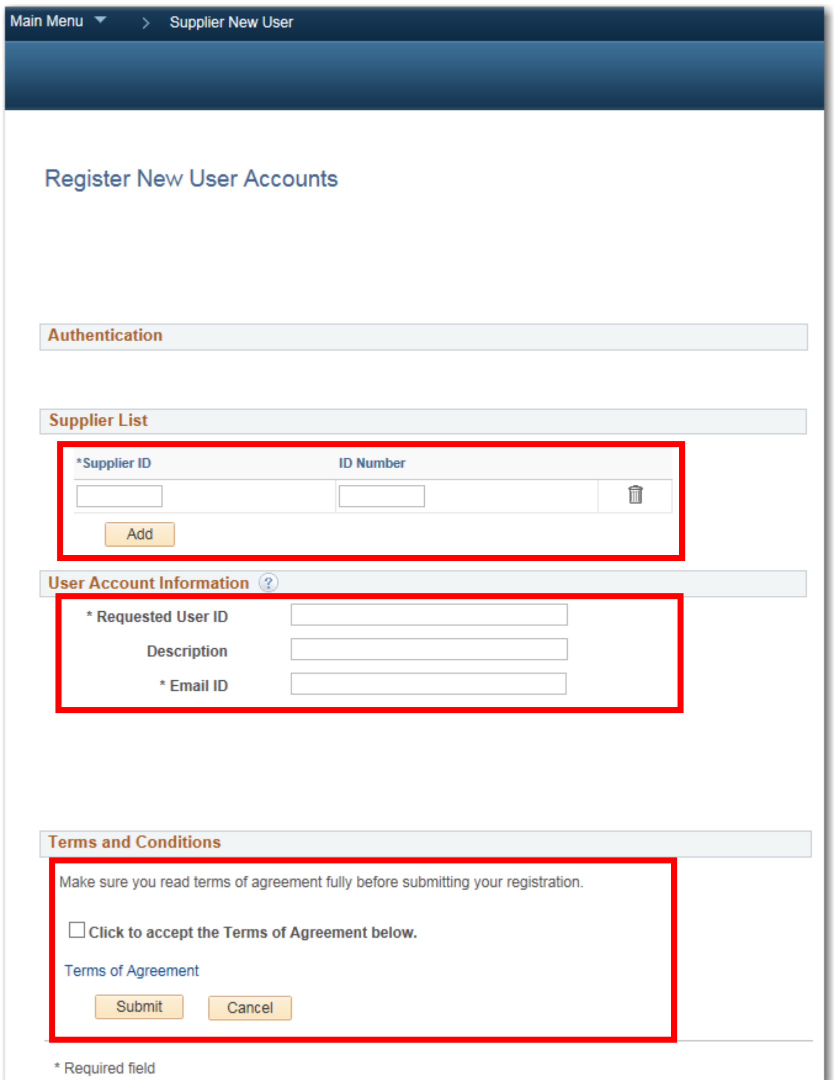
b) Type the **Supplier ID** and **ID Number** (tax ID);

c) Click **Add**

d) Type the **Requested User ID** (limit 10 characters), **Description** and **Email ID** (email for the requested user)

e) Read the **Terms of Agreement** and select the **check box** to accept the terms;

f) Click **Submit**. The password and login instructions will be sent to the Email ID, which takes approximately 5-10 minutes.



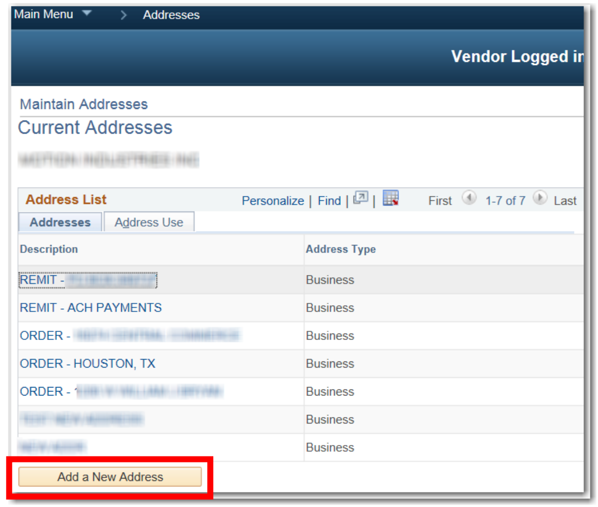
4. Addresses

Allows the ability to add new addresses, but not to edit an existing address. NOTE: To edit or to remove an existing address, email vendor@lcra.org with request.

To add a new address or additional address(es):

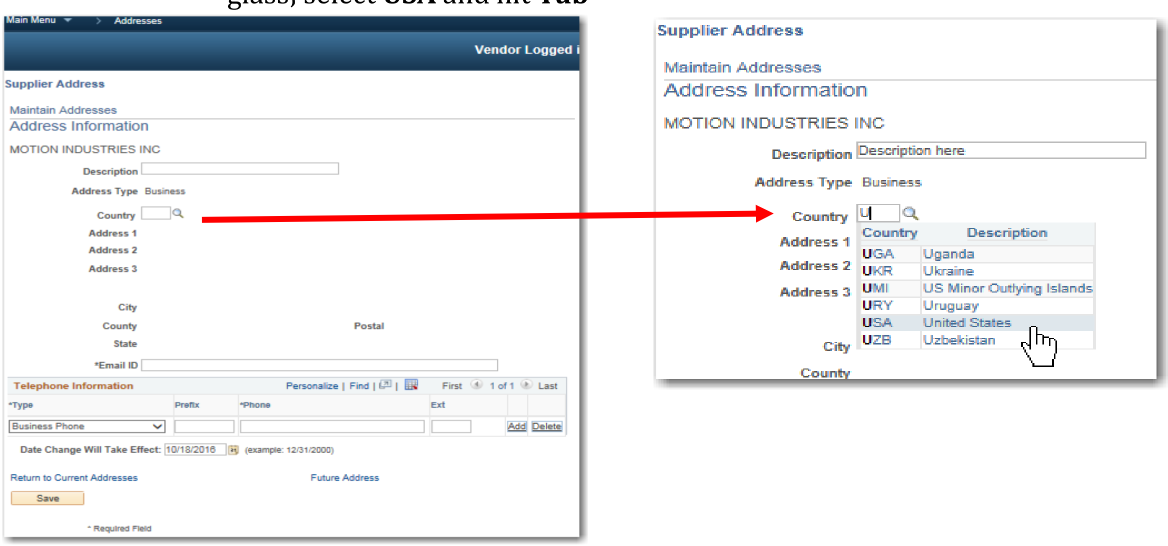
a) Click **Addresses** link from the navigation to the left

b) Click **Add a New Address**



c) Input the **description**

d) Input the **Country code** – type **U** to find USA or look up by clicking the magnifying glass; select **USA** and hit **Tab**



e) The Address fields open that require the following: **Address line 1, City, County, State** and **Postal**. It is not mandatory to enter the **Email ID** or the **phone number**.

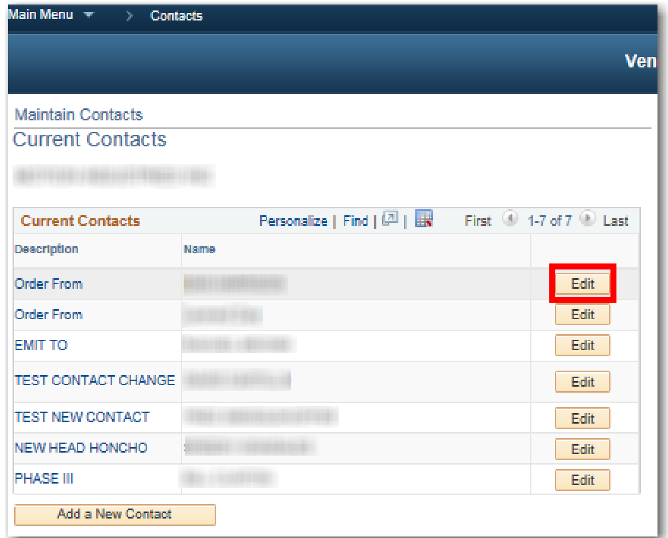
f) Input the specific date to take affect

g) Click **Save**

5. Contacts: To update contact information for suppliers

a) Click **Contacts** link from the navigation

b) Click **Edit** next to the item to be changed



c) Make necessary changes; click Save

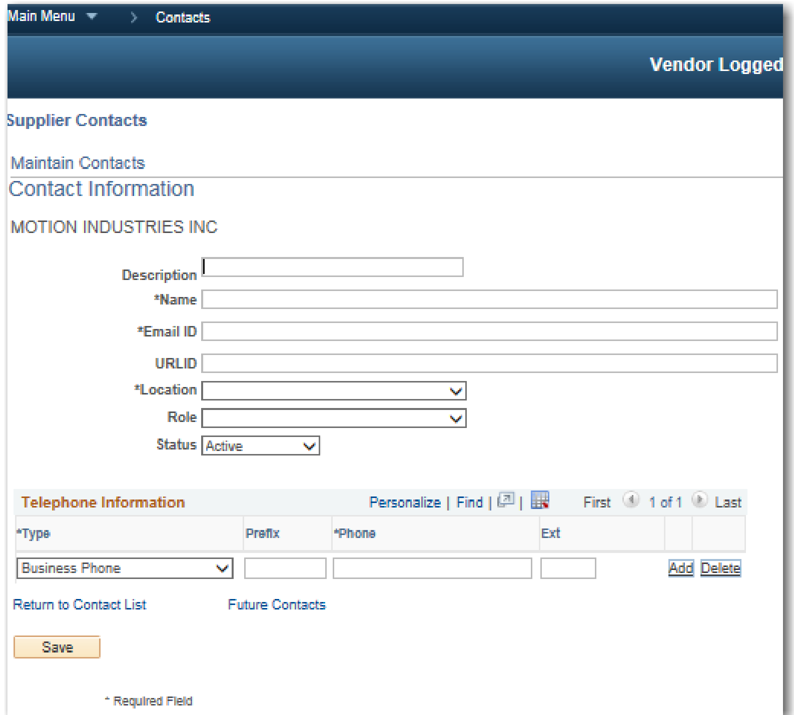
6. Contacts: To add a new contact for suppliers

Requirements: email and phone number

a) Click **Contacts** link from the navigation

b) Click **Add a New Contact** button

c) Input the **description** and **name**; select drop down next to **Location, Role and Status** to select the appropriate options.



d) To input the phone number, select the drop down under **Type** to select the appropriate information; **in the Phone field, enter the area code and number.** Enter an **Extension** if applicable. Click **Add to input additional phone numbers if needed.**

e) Click **Save**

D. Searching Information

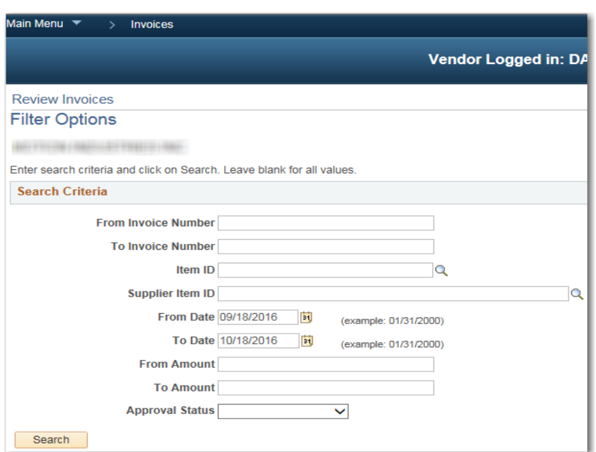
Searches can be performed on invoices, payments, account balances, purchase orders, view order summary, view receipts and respond to quote.

1. Invoices

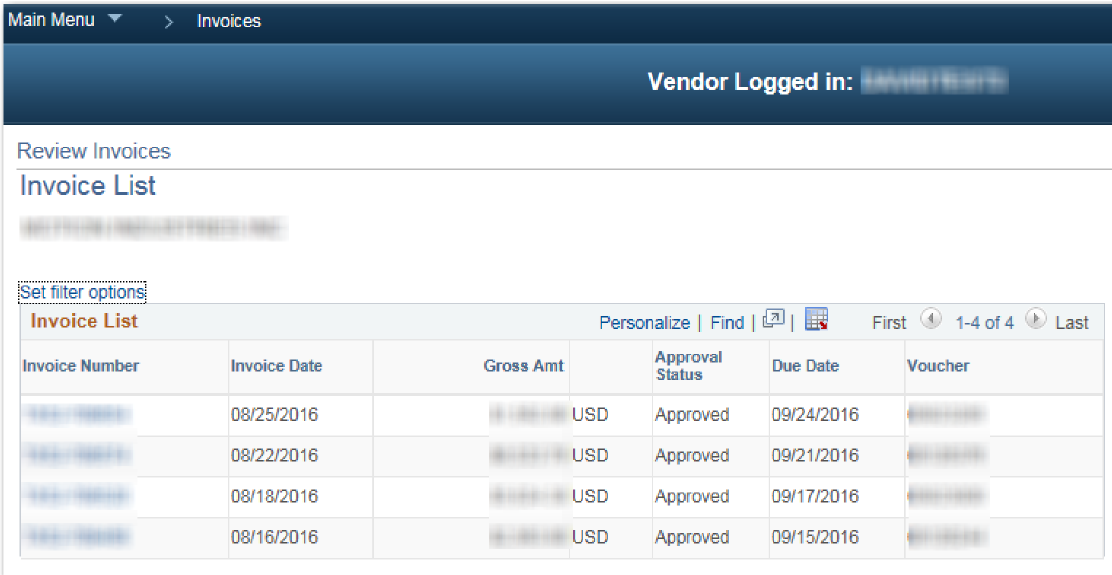
a) Click on the **Invoices link** from the navigation

b) Enter your search criteria (invoice number, date range, Item number, etc.)

c) Click **Search**



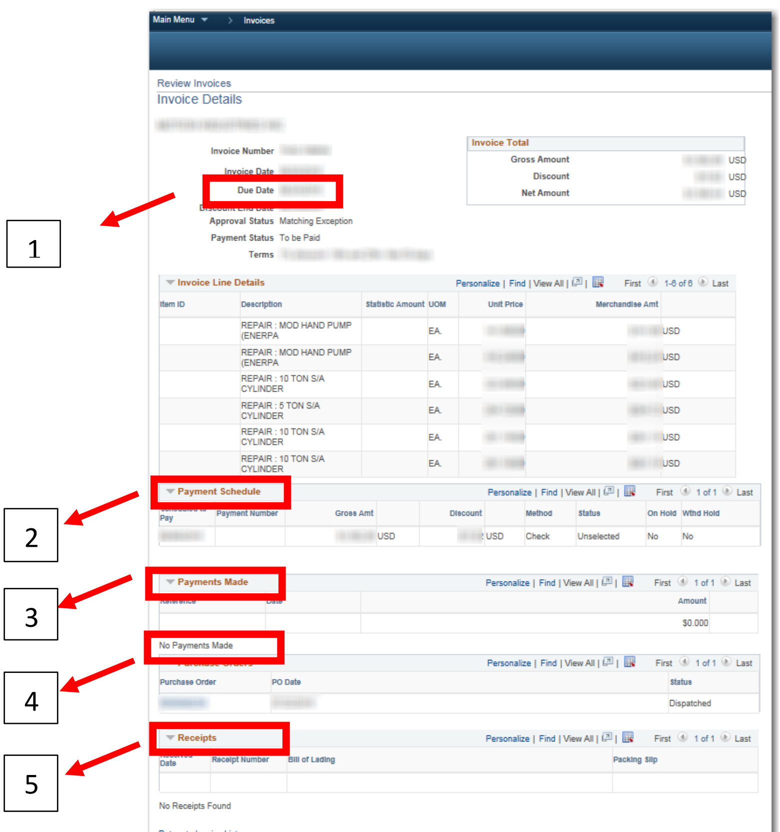
d) A new page will appear with the results from your search criteria.



e) Click on the **Invoice Number** that you wish to view.

f) Invoice details will appear.

g) You can find the payment **1) Due Date** in the header section, and associated information at the bottom of the screen for **2) payment schedule, 3) payments made, 4) purchase orders,** and **5) receipts**.

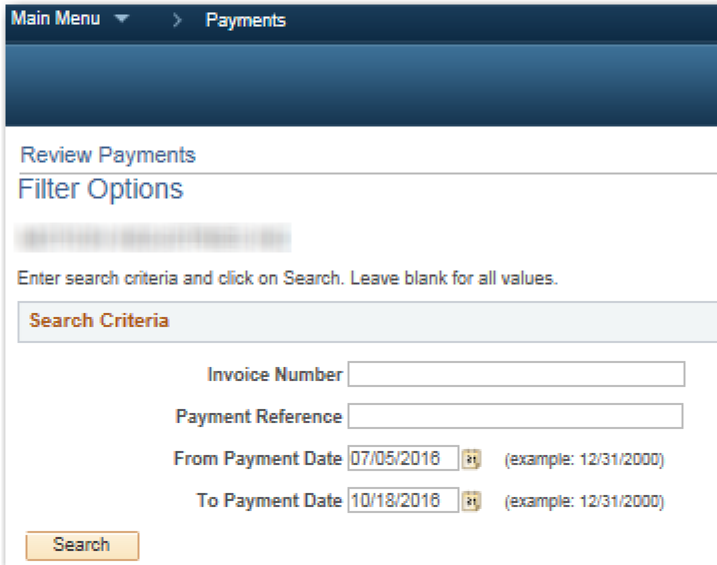


2. Payments

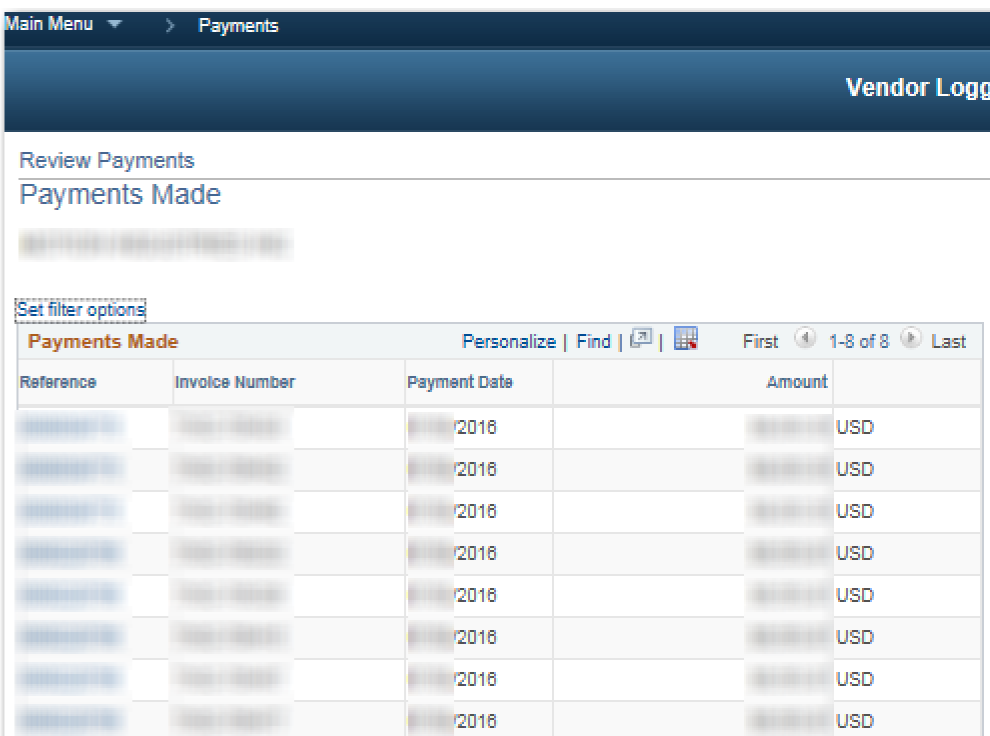
a) Click on the **Payments** link from the navigation

b) Enter your search criteria (Invoice number, date range, etc.)

c) Click **Search**



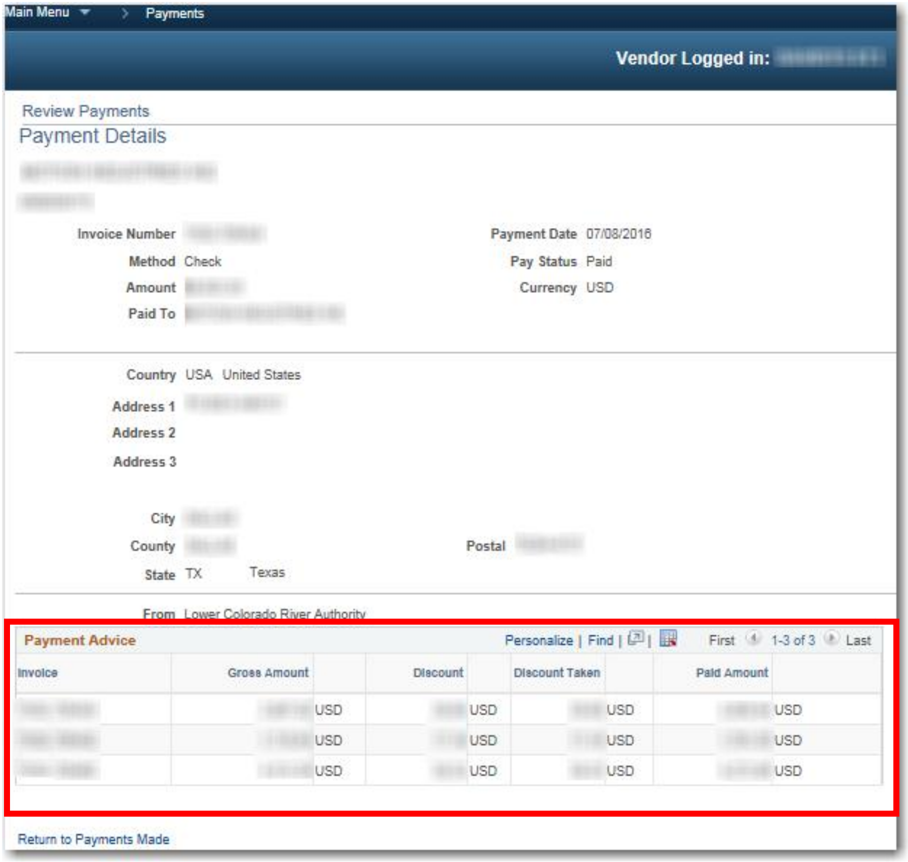
d) A new page will appear with the results from your search criteria.



e) Click on the Payment Reference Number that you wish to view

f) Payment details will appear

g) You can view associated invoices at the bottom

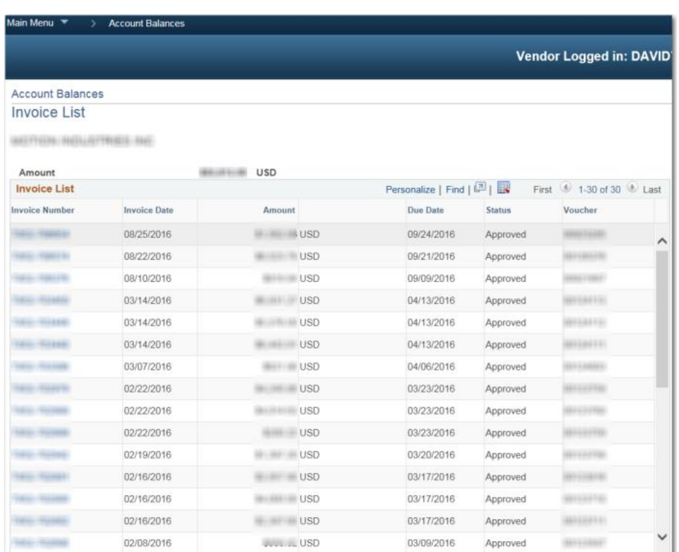


3. Account balances

a) Click on the **Account Balances** link on the navigation to the left.

b) A new page will appear with all your invoices that have not been paid.

c) Click on any invoice number for invoice details.



4. Purchase Orders

a) Click on the **Purchase Orders** link on the navigation to the left.

b) Enter your search criteria (PO number, date range, Item number, etc.)

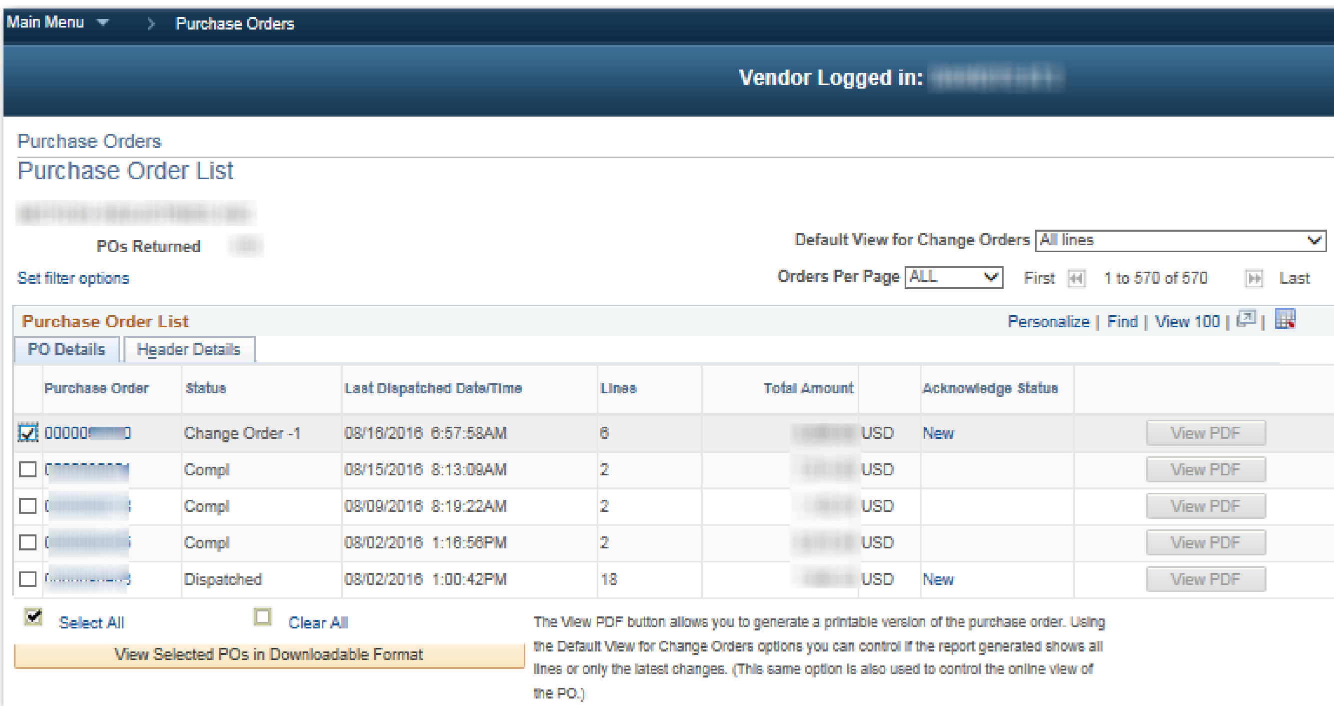
c) Click **Search**

d) A new page will appear with the results from your search criteria.

e) Click on the **PO number** in the Purchase Order column that you wish to view.

f) Purchase Order List will appear.

g) To see details about a particular PO, click on the **Purchase Order** number.



a) Purchase Order Details page appears.

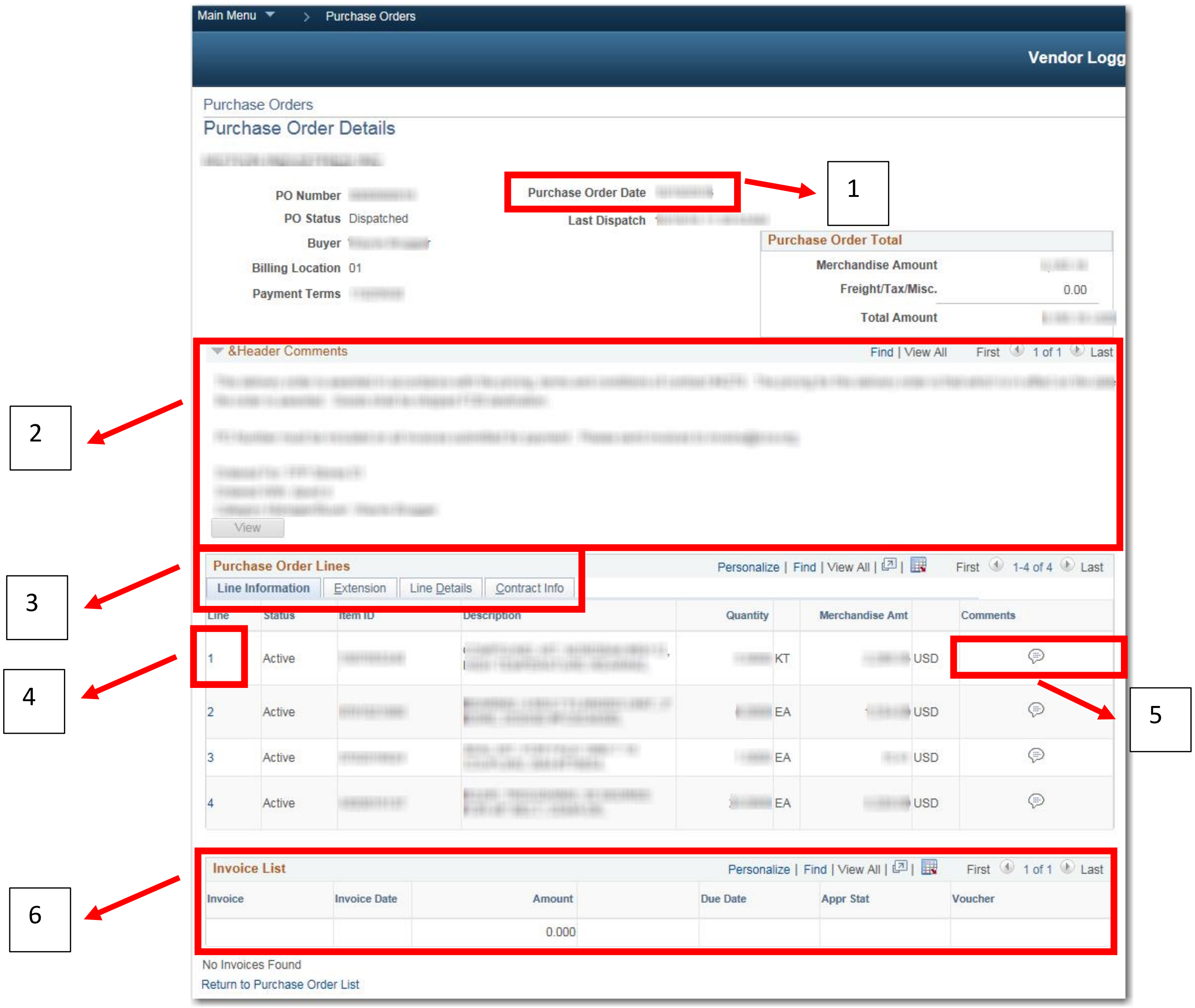
b) **Purchase Order date** (1) and **header comments** (2)

c) **Extension**, **Line Details** and **Contact Info** (3) can be found in tabs.

d) **Purchase Order Line Information** can be viewed by clicking the line number. (4)

e) **Comments** can be viewed by clicking on the comments icon. (5)

f) **Invoices** against this PO will show in the **Invoice List** at the bottom. (6)



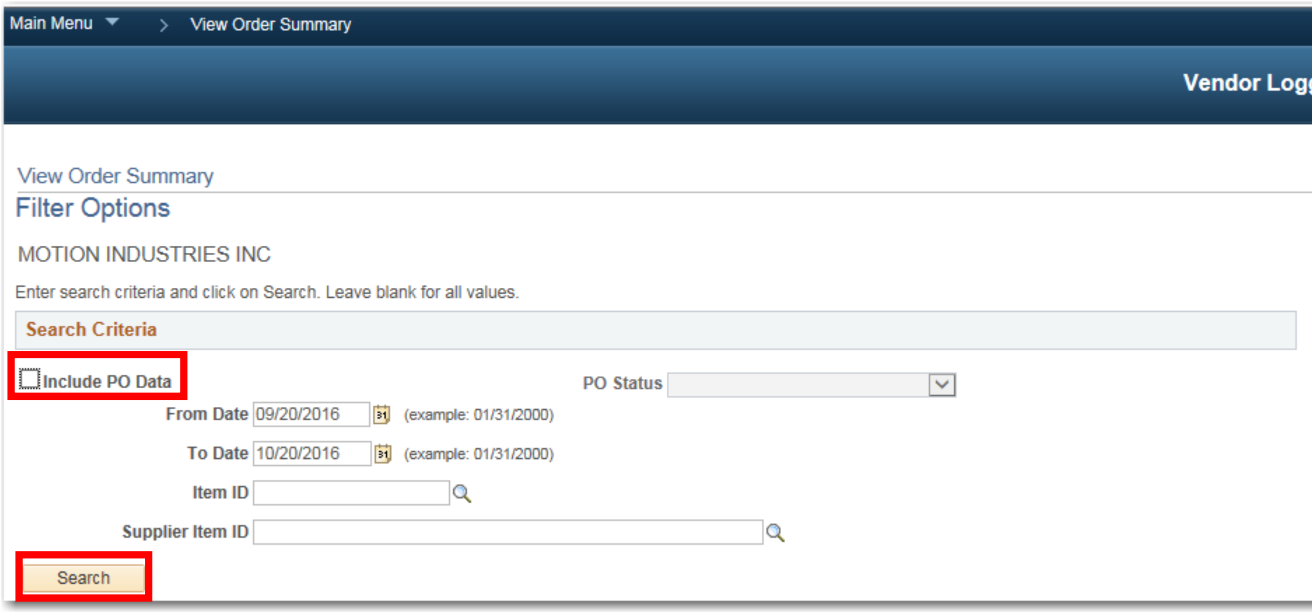
5. **View Order Summary**

a) Click on the **View Order Summary** link on the navigation to the left.

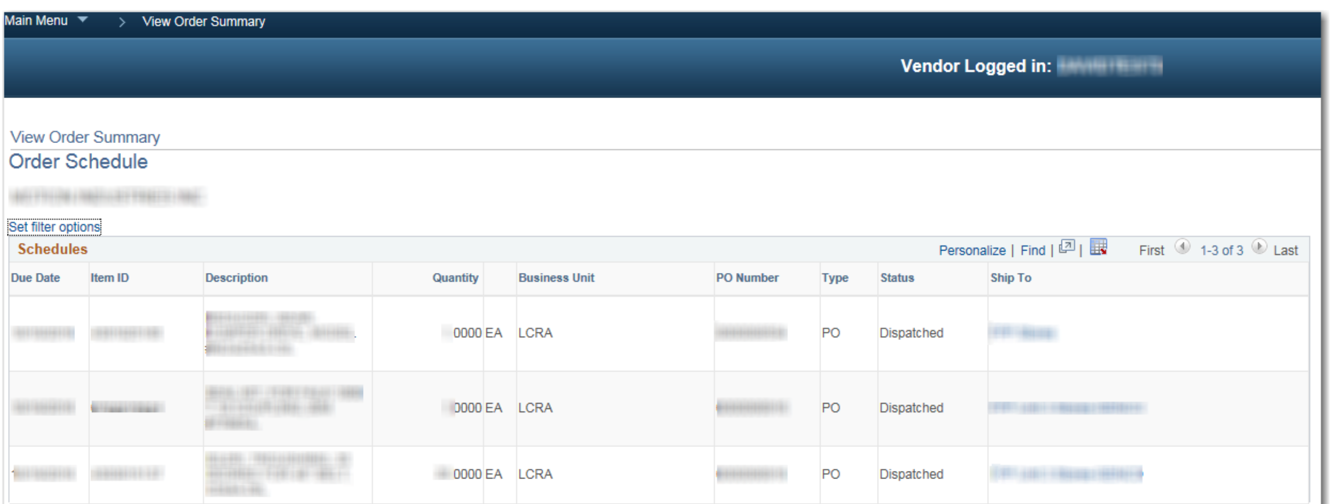
b) Enter your search criteria (date range, Item ID, Supplier Item ID, etc.)

c) Select the check box **Include PO Data.**

d) Click **Search.**



a) A new page will appear with the results from your search criteria.

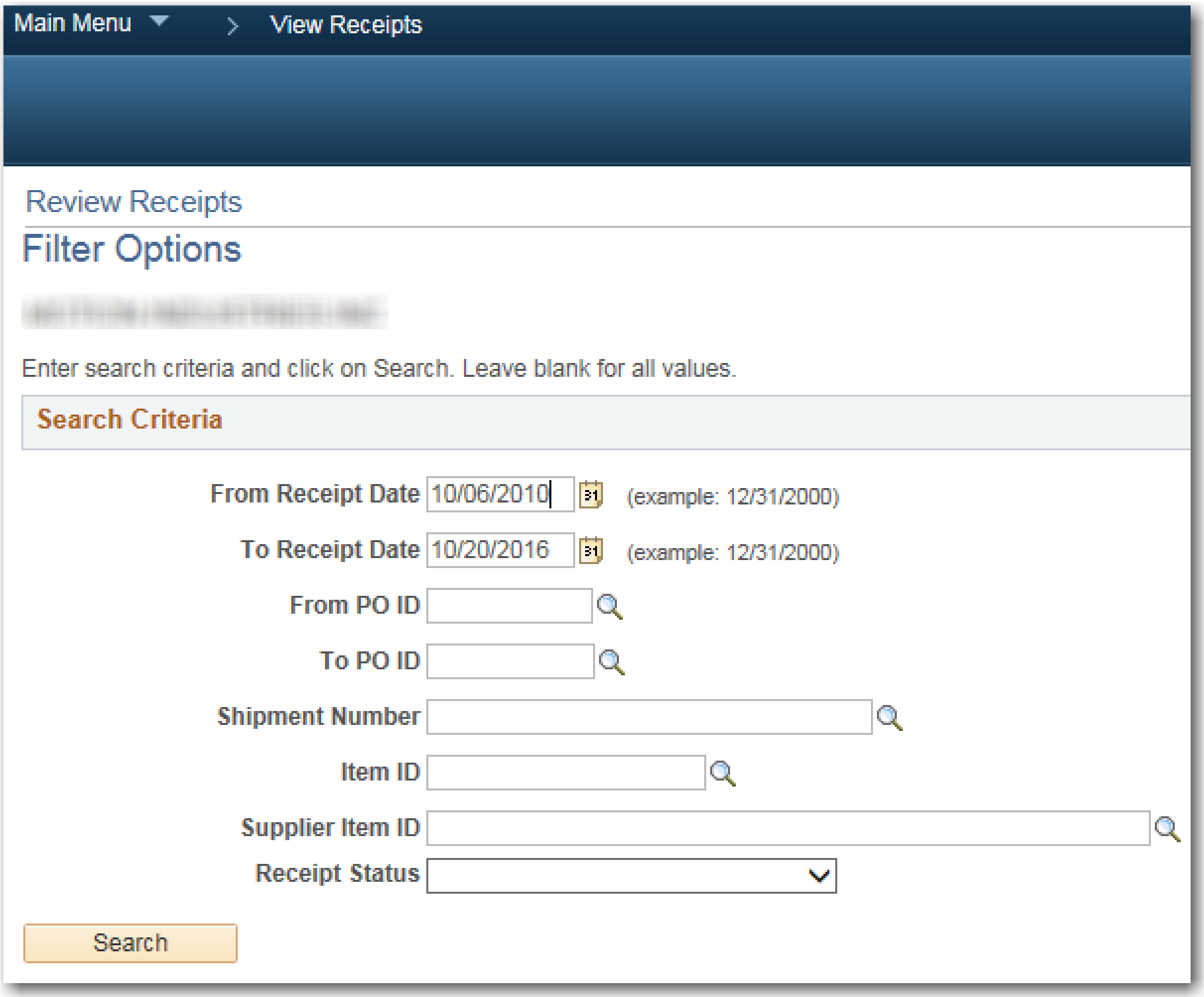


6. **View Receipts**

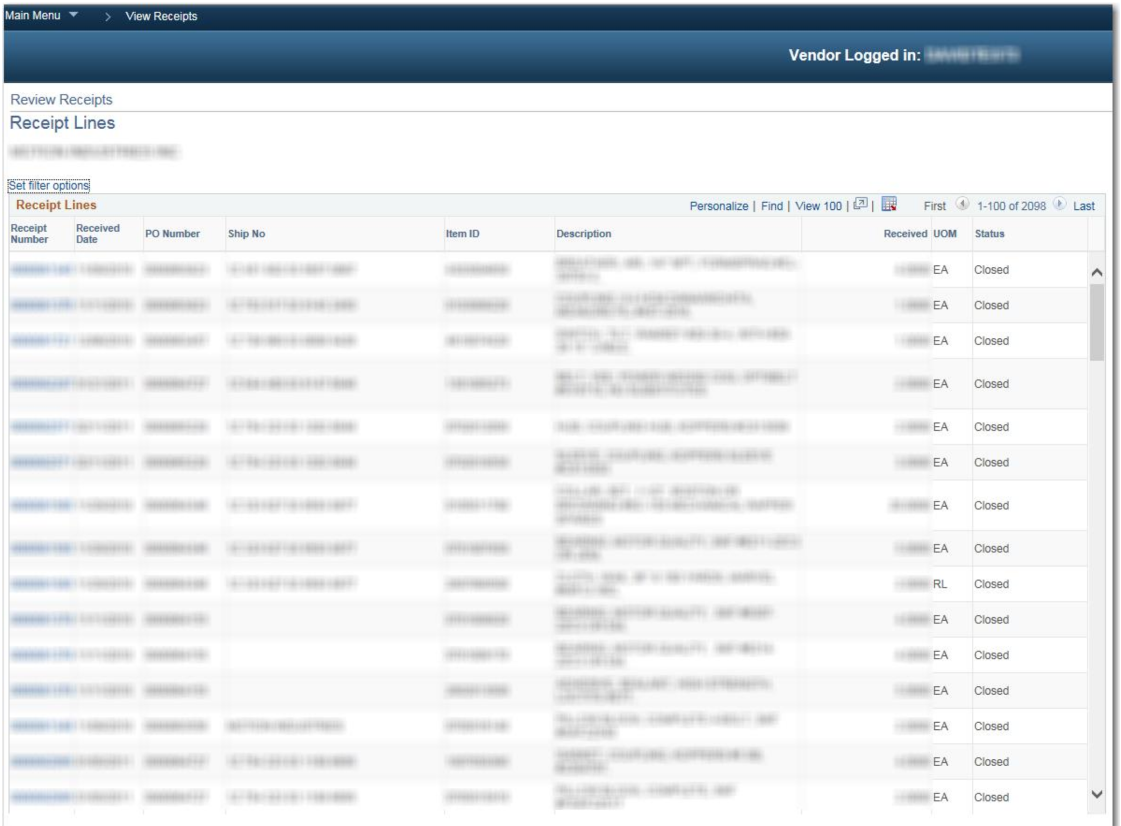
a) Click on the **View Receipts** link on the navigation to the left.

b) Enter your search criteria (receipt date range, PO ID, Shipment number, Item ID, Supplier Item ID, Receipt status).

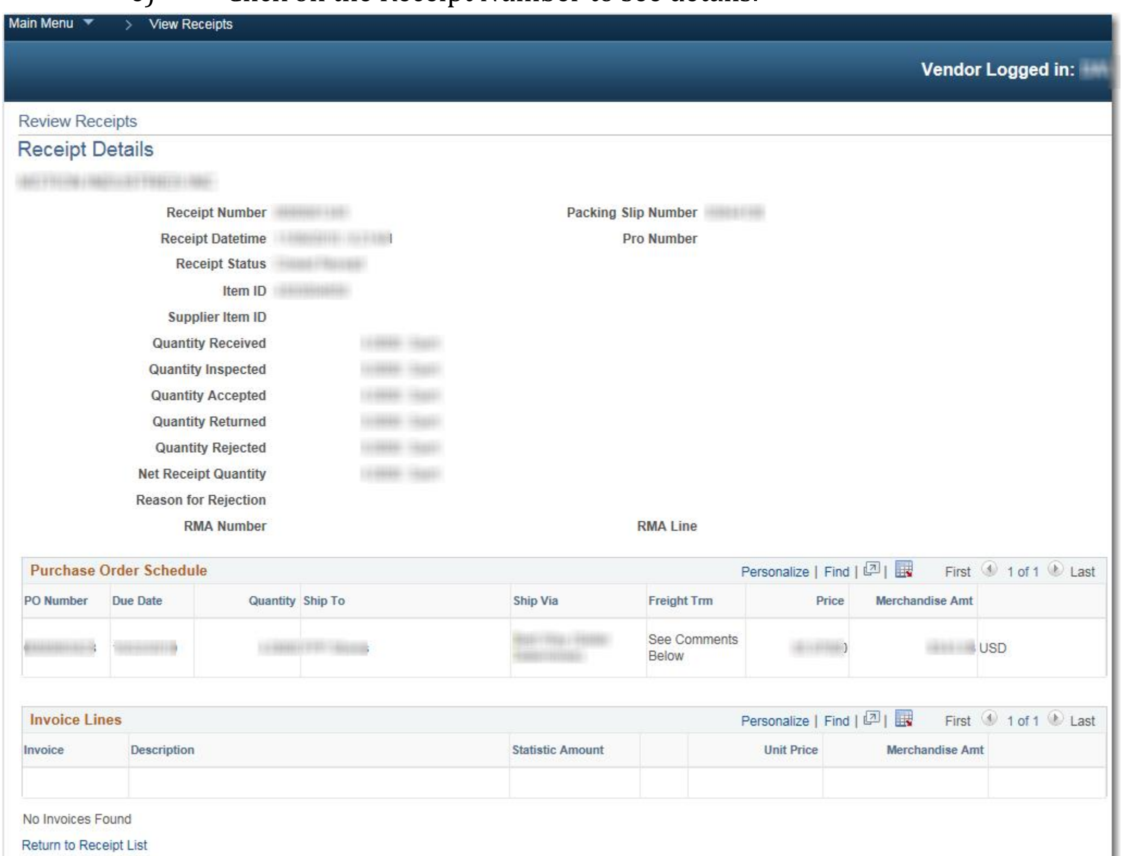
c) Click **Search.**



d) A new page will appear with the results from your search criteria.



e) Click on the Receipt Number to see details.



7. Respond to quote

LCRA does not issue requests for quotes through this system, but current opportunities may be found on our website.

a) Go to www.lcra.org

b) Click on the **About** tab at the top

c) In the navigation to the left, click **Business Opportunities with LCRA.**

d) Click **Business Opportunity Postings** to see business opportunities with LCRA.

8. Change Password

Requirements: The password must:

- Be at least 8 characters in length.
- Contain at least 3 of the 4 following character types:
  - a) Lowercase letters (abc)
  - b) Uppercase letters (ABC)
  - c) Numbers (123)
  - d) Special characters (#?*!)

To change your password:

a) Enter the **Old Password**

b) Enter the **New Password**

c) Confirm the **New Password**

d) Click **Change Password**

Your password is now changed.

9. Sign out of eSupplier

a) Click on the **Sign Out of eSupplier** link on the navigation to the left to sign out of eSupplier.