

**Navistar Direct Ship iSupplier Portal – Supplier User Guide**  
**(v1 – 9/26/2012)**

Navistar Direct Ship iSupplier Portal  
[https://dhp.navistar.com/OA\\_HTML/AppsLogin](https://dhp.navistar.com/OA_HTML/AppsLogin)

Navistar Direct Ship iSupplier Portal Online Training  
<https://evalued.internationaldelivers.com/dna-upk-ex/toc0.html>

**Please insure you have added the @navistar.com domain as a 'Safe' domain and applmgr@navistar.com as a 'Safe' sender in your email system to insure that you receive emails from the Direct Ship iSupplier Portal**

**Supplier User Guide Contents**

**\*\* Note: Sections providing specific information on how to perform tasks in the Navistar Direct Ship iSupplier Portal are in DARK RED TEXT in the Contents and Throughout the Document \*\***

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## Navistar Direct Ship ERP System Overview for Suppliers

### System Overview

- Navistar's new ERP System for Direct Ship Service Parts launched on September 6, 2012.
- This ERP implementation is a further step in our ongoing initiatives to update and upgrade our existing Parts Systems
- A primary goal of this Direct Ship ERP System implementation is to increase the level electronic communication between Navistar and our customers and suppliers.
  - EDI is the preferred method of information exchange (EDI installation or Third Party provider such as Liaison Inc's Athena Product)
  - iSupplier Portal is a functional alternative to EDI for some suppliers and also an effective tool to compliment EDI
- New information requested from suppliers is being conveyed to the end customer.
- **Navistar no longer faxes the majority of Direct Ship PO's to suppliers upon launch of the Direct Ship ERP System**
  - Direct Ship iSupplier Portal and the new Purchase Order Number sequence (next bullet ) cover the vast majority of Direct Ship PO's which previously started with 00D. Certain exceptions will continue to be faxed, including:
    - All Critical (00C\_\_\_\_) Purchase Orders
    - Certain Direct Ship Orders for Government customers and Ford customers will continue to deliver PO's by Fax (will continue with 00D numbering)
- **The New Direct Ship ERP System uses new Purchase Order Numbering:**
  - US-800000000 (United States)
  - CA-700000000 (Canada)
  - MX-500000000 (Mexico)
  - GL-600000000 (Global)
  - *Note: Direct Ship iSupplier Portal displays do not show the XX- prefix, but rather show the Operating Unit next to the PO Number*
  - These Purchase Orders must be the primary reference the supplier utilizes with Navistar, including on your Invoice
  - Additional PO Header Information (Customer Order Number, Navistar Sales Order Number, Blanket Number) can be utilized for additional reference information

### Training and Support Available

- If you have received your Direct Ship iSupplier Portal SPxxxxx1111 User ID and are having issues accessing the Direct Ship iSupplier Portal, please contact the Navistar Supplier Helpdesk for technical assistance
  - suppliersupport@navistar.com
  - (800) 527-7879
- If you are logged into the Portal and having issues with a Particular Direct Ship iSupplier Function (such as Acknowledgments, ASNs, or Invoices), please reference
  - This Word Document, and
  - The online Direct Ship iSupplier Portal Training available at <https://evaluated.internationaldelivers.com/dna-upk-ex/toc0.html>
  - If these materials do not help you, then please contact the Navistar Supplier Helpdesk (information above) to open a support ticket. The Helpdesk will attempt to assist with your issue and forward you to the appropriate Project Team resource if they cannot assist
- For general Direct Ship ERP System or process inquiries, please email dssupplierinfo@navistar.com

### **Obtaining the Supplier's First Direct Ship iSupplier Portal User ID**

If a supplier contact does not yet have a User ID (see format below) for the Direct Ship iSupplier Portal, the contact should send an email to [dssupplierinfo@navistar.com](mailto:dssupplierinfo@navistar.com) with the following information in order to have a new User ID established:

- **Information Required to set up a Direct Ship iSupplier Portal UserID**
  - **The Supplier Code** (first 5 digits only needed; available on recent or past Direct Ship PO's if the supplier contact is unsure)
  - **User's Name**
  - **User's email address**
- **Once the supplier's ID is established, they will need to wait at least 4 hours to log into the Direct Ship iSupplier Portal to security setup to complete, however the user will IMMEDIATELY BEGIN RECEIVING EMAIL NOTIFICATIONS OF DIRECT SHIP ACTIVITY INCLUDING EMAILS WITH PDF ATTACHMENTS OF ANY PURCHASE ORDERS.**

#### **Once the Supplier's Direct Ship iSupplier Portal User ID is established...**

- The Supplier's UserID to the Direct Ship iSupplier Portal will be **SPvvvvv10##**, where
  - SP is a fixed identifier
  - vvvvv = the five digit vendor number, and
  - 10## is the numerically assigned user number (1001 for the first user, 1002 for the 2<sup>nd</sup> user, etc.)
  -

*Please note that a supplier with an ID in the format of Svvvvv10## (no 'P' in the 2<sup>nd</sup> character) is providing their ID from the PDC iSupplier Portal. This ID will NOT work in the Direct Ship iSupplier Portal*

## Information for ALL Direct Ship iSupplier Portal Users

- General Navigation of the Direct Ship iSupplier Portal
  - From the Oracle Applications Home Page (select 'Home' in the middle upper right to get to this Page if Not Already there)
  - Under the Main Menu on the left side of the Screen, two possible responsibilities are available
    - **Navistar iSupplier User** (Operational & Transactional Functions)
    - **Navistar Supplier Profile & User Manager** (Administrator Functions)
    - NOTE: If a user is only given one of these accesses, then their 'Home' may default to that specific screen only
  - Click on **Navistar iSupplier User** to get to the User Home Page
    - The User Home Page will be shown and the Home Tab will be highlighted. The Home tab is a general dashboard which can be used, but primary functionality is in the other Tabs as Listed Below
    - Orders Tab
      - Predefined Views to List PO's are available (All Purchase Orders and Purchase Orders to Acknowledge). Select a View and Click 'Go' to refresh the PO List
      - Advanced Search Options are available by selecting Advanced Search button on the right side
      - Many iSupplier Portal Screens contain an 'Export' button in the upper right hand corner which allows the User to Export the listing displayed to a .CSV file so that it can be opened in Microsoft Excel
    - Shipments Tab
      - Main functionality is under the option of 'Shipment Notices'
        - Create Advance Shipment Notices
        - View Advance Shipment Notices
    - Finance Tab
      - Create Invoices
      - View Invoices
    - Product Tab
      - Provides supplier ability to query against Items / Parts on their account
      - Search feature available – Select the Item by choosing the magnifying glass next to the Item field
      - Enter a portion of the Item number if desired, or just select 'Go' to perform an open search
      - Select an Item by selecting the 'Quick Select' icon or by clicking the 'Select' radio button and then choosing 'Select'
      - Back on the Product Tab search, the Item selected will be populated in the item field. Select 'Go' to perform the search
      - Information on the Part by Navistar Organization will be shown. Icons to the right of the item number allow the user to inquire for information on that item number, including
        - Purchase Orders
        - Overdue Orders
        - Receipt History
        - Returns

- **Setting Preferences (including Language Option and Enabling / Disabling EMAIL NOTIFICATION)**
  - **Turning Off Email Notifications**
    - Log in to the Direct Ship iSupplier Portal at <https://dhp.navistar.com> with your SP#####10## User ID
    - In the upper right corner of the Portal screen, select “Preferences”
    - On the General Preferences page which appears, Scroll to the bottom of the screen under the section titled “Notifications”
    - Change the selection in the drop down menu next to “Email Style” to the option “Do not send me mail”
    - In the lower right corner, select the “Apply” button to complete the Preference update
    - The user will now no longer receive any email notifications from the Direct Ship iSupplier Portal, however their User ID is still valid and active and they may continue to access the system.
  - **Language Option** (follow the same steps as above, except select a different language in the ‘Current Session Language’ or ‘Default Application Language’)

## Information for Supplier Administrators (Navistar Supplier Profile and User Manager Responsibility)

- **Creating a New User (Supplier Administrators with the 'NAVISTAR SUPPLIER PROFILE & USER MANAGER' Responsibility)**
  - Log in to the Direct Ship iSupplier Portal at <https://dhp.navistar.com> with your SP#####10## User ID FROM MAIN MENU...
  - SELECT RESPONSIBILITY 'NAVISTAR SUPPLIER PROFILE & USER MANAGER' from the HOME Page (you may need to click on 'Home' in the upper right of the screen to get to this screen first)
  - SELECT 'CONTACT DIRECTORY'
  - SELECT 'CREATE'
  - ENTER THE EMAIL ADDRESS AND NAME OF THE SUPPLIER CONTACT IN THE APPROPRIATE FIELDS
  - CHECK THE BOX LABELED 'CREATE USER ACCOUNT FOR THIS CONTACT'
  - THIS WILL OPEN UP THE DETAILS FOR THE USER ACCOUNTS...
    - UNDER RESPONSIBILITIES, CLICK TO ASSIGN THE USER HAS ONE OR BOTH 'NAVISTAR ISUPPLIER USER' AND 'NAVISTAR SUPPLIER PROFILE & USER MANAGER' ACCESS
  - CLICK 'APPLY' TO CREATE THE ACCOUNT. YOU WILL BE RETURNED TO THE CONTACT DIRECTORY AND BE ABLE TO SEE THE NEW USER YOU HAVE CREATED
- **Updating Contact Information (steps to update existing User ID's including Inactivating Users and Changing Responsibilities)**
  - Log in to the Direct Ship iSupplier Portal at <https://dhp.navistar.com> with your SP#####10## User ID FROM MAIN MENU...
  - SELECT RESPONSIBILITY 'NAVISTAR SUPPLIER PROFILE & USER MANAGER' from the HOME Page (you may need to click on 'Home' in the upper right of the screen to get to this screen first)
  - SELECT 'CONTACT DIRECTORY'
  - Review the list of Active Contacts, and select the pencil icon on the far right to 'Update'
  - The Contact's Full Name and Email Address are shown, click on the '+' icon next to 'User Account Information' to expand
    - To add or remove responsibilities, check or uncheck the appropriate responsibilities
    - To inactivate a User, enter an 'Inactive Date' under the User Account Information (NOTE: Be sure to enter the Inactive Date under User Account Information and not in the similar box immediately underneath the Contact email address at the top of the screen)

## **Information for Supplier Users (Navistar iSupplier User Responsibility)**

- **Viewing and Printing Purchase Orders**
  - From the Navistar iSupplier User Responsibility home tab, Select the 'Orders' tab
  - To view a Single Purchase Order, click on the Purchase Order Number to select it, and a
    - *NOTE: Immediately next to the Purchase Order number on the Orders Tab listing are the Revision Number and the Operating Unit (U.S., Canada, Mexico, Global)*
    - *NOTE: "Blanket Agreements" are also visible in the Portal*
      - *Blankets are the listing of Direct Ship Parts available on your program (No Quantities, No Ship To Codes)*
      - *Generally no action is necessary*
      - *Different than "Standard Purchase Orders"*
      - *Blankets are 6 characters beginning with an M, P, R, or Z (ex. M00007)*
  - After clicking on a Purchase Order, the screen will open up the Purchase Order, showing the general / header information at the top, and the PO Details (line information) at the bottom
    - *NOTE: Under the PO Details, select 'Show all Details' to see additional information on each line item*
  - To Print a PDF of the Purchase Order, from the Actions menu in the upper right, drop the menu down and Select 'View PDF' and then click 'Go'
    - Your system will prompt you if you would like to open or save the PDF
    - Note the PDF has a similar layout – header information at the top and detail (line) information at the bottom
    - Note all key information in the PO Header and note the presence of:
      - PO Header Level messages (if present) are printed immediately above the beginning of the PO Details
      - PO Line Level messages (if present) are printed immediately below each line item
      - Note: These messages can be viewed on the Purchase Order screen as well...
        - Select the 'View' option next to the 'Attachments' label on the Purchase Order Header and then select from the attachments to view the Header Level messages
        - Scroll down to view the lines and click on the paper clip Icon underneath the 'Attachments' column to view the Line Level Messages

- **Purchase Order Acknowledgment**
  - General Information about Purchase Order Acknowledgment
    - Direct Ship Purchase Orders should be Acknowledged and Updated with a Promise Ship Date within 24 hours of PO receipt by the supplier
    - The Promise Date is defined to be the date the supplier plans to ship the order such that the specified ordered quantity is completely fulfilled (i.e. the 'last' shipment date if a PO line will be shipped in more than one shipment). PO lines cannot be 'split' at the time of Acknowledgment
    - ALL LINES ON A PURCHASE ORDER MUST BE ACKNOWLEDGED IN ORDER TO ACKNOWLEDGE THE PURCHASE ORDER
    - Promise Dates can be updated more than once (if required)
    - Purchase Orders can be Acknowledged in iSupplier Portal in two ways:
      - Simple "Acknowledgment" – Best for single PO's with limited lines
      - "Multiple PO Change" Method – Best for acknowledging and updating promise date information for multiple PO's and / or PO's with many lines
- **Performing Purchase Order Acknowledgment in the Direct Ship iSupplier Portal**
  - **OPTION 1: Simple Purchase Order Acknowledgment**
    - From the Navistar iSupplier User Home Page, Select the 'Orders' tab
    - Select a SINGLE Purchase Order to acknowledge, either by
      - Selecting the radio button to the left of the Purchase Order number and hitting the 'Acknowledge' button, or
      - Clicking on the PO number itself to view the PO, and then choose 'Acknowledge' from the Actions menu on the upper right and click 'Go'
    - In the 'Acknowledge for Standard Purchase Order' screen, scroll down to see the PO Detail line items
    - Click on the 'Show All' option underneath the PO Details line to fully display all PO lines
    - Make the following 3 Updates on EACH LINE ITEM OF THE PO
      - Choose the Promised Date (the date the line will Ship)
      - Enter a reason of 'ok' (this is a text field that just needs some entry)
      - Select 'Change' from the Action menu on the right side of each line
        - *NOTE: The updating of the Promise Date from the default promise date (same as order date) is treated by the system as a "Purchase Order Change". This is simply the way the system handles the update and does not mean any items or quantities on the PO are changing*
    - Once ALL LINES are updated with this information, choose the button in the upper or lower right corner to 'Submit'
      - *NOTE: The system will confirm with a 'Change Order Confirmation' and state that "Change Request for Purchase Order ##### has been submitted for approval". As indicated above, the Promise Date update is treated as a Purchase Order Change in the system. If the instructions above were followed and only the Promise Date was updated, this "Change Request" will be automatically approved, and the PO will now show in 'Revision 1' with a status of 'Accepted'*



- **OPTION 2: Multiple Purchase Order Acknowledgment**
  - From the Navistar iSupplier User Home Page, Select the 'Orders' tab
  - In the upper right corner, select the button for 'Multiple PO Change'
    - *NOTE: The updating of the Promise Date from the default promise date (same as order date) is treated by the system as a "Purchase Order Change". This is simply the way the system handles the update and does not mean any items or quantities on the PO are changing*
    - *NOTE: This option allows multiple lines to be updated, but is best used if all lines to be updated are being updated with the SAME PROMISE DATE*
  - Query a listing of Purchase Order line items to select for update. Do this by either
    - Change the 'View' option to "All Shipments" (or one of the other options if appropriate) and select 'Go', or
    - Select the 'Advanced Search' button at the right and define more specific parameters to search for a single Purchase Order or a list of Purchase Orders
  - Once the list of Purchase Order lines is available, SELECT THE SPECIFIC PO LINES YOU WANT TO ACKNOWLEDGE BY CHECKING THE 'SELECT' BOX TO THE LEFT OF EACH PO NUMBER
    - *NOTE: Although this option allows you to select PO's on a line by line basis, remember that you do still need to provide a Promise Date update on ALL lines of a Purchase Order in order to fully Acknowledge the Purchase Order*
  - Once all Lines you wish to update are selected, scroll back up above the PO Line list to the section titled 'Default Values'. In the Default Values section, update the following 3 fields
    - Choose the Promised Date (the date the lines will Ship)
    - Enter a reason of 'ok' (this is a text field that just needs some entry)
    - Select 'Change' from the Action drop down menu
      - *NOTE: The updating of the Promise Date from the default promise date (same as order date) is treated by the system as a "Purchase Order Change". This is simply the way the system handles the update and does not mean any items or quantities on the PO are changing*
  - After entering this information, click on the button labeled 'Apply Default Values' which will transfer this information to ALL lines previously select
  - Choose the button in the upper or lower right corner labeled 'Apply' to complete the Acknowledgment
    - *NOTE: The system will confirm with an 'Information' message and some notes that state "Purchase Order #####: - Change Request has been submitted for approval". As indicated above, the Promise Date update is treated as a Purchase Order Change in the system. If the instructions above were followed and only the Promise Date was updated, this "Change Request" will be automatically approved, and the PO will now show in 'Revision 1' with a status of 'Accepted'*

- **Advance Shipment Notice**
  - General Information about Advance Shipment Notices (ASN)
    - Advance Shipment Notices should be entered as soon as possible after the actual physical shipment of goods, generally within 4 business hours
    - The following information is REQUIRED on all ASN's
      - Shipment Date (not later than the date of entry)
      - Expected Delivery Date
      - Shipment Number (supplier's shipping reference)
      - Actual Freight Carrier (4 character SCAC Code)
      - Tracking Number (Waybill / Airbill Number field)
    - ASNs are prepared by PO and line item and do allow for split / partial shipments
    - ASNs cannot be modified after they are entered
    - ASNs can NOT be submitted for Global Orders in the Direct Ship iSupplier Portal
- **Entering an ASN in the Direct Ship iSupplier Portal**
  - From the Navistar iSupplier User Home Page, Select the 'Shipments' tab
  - Select 'Shipment Notices'
  - Select 'Create Advance Shipment Notices'
  - If the PO's to ship are shown in the Default view of 'Shipments Due this Week', proceed to the next step
    - If the PO's to ship are not shown, change the View to 'All Shipments' and select 'Go'
  - From the list of purchase order line items, select all of the Line items to be included on this shipment by checking the 'Select' box to the left of the PO Number and line item.
  - Once all lines are selected, click on the box labeled 'Add to Shipment Notice'
  - The lines will now be selected and shown as being on a tab labeled 'Shipment Lines' near the top of the screen
    - If needed, select 'Show All Details' to see additional line information
    - If needed, adjust the 'Quantity Shipped' fields for each line to match the actual quantity to be shipped
  - Click on the 'Shipment Header' tab, and then enter the following 5 required fields
    - 'Shipment Number' – the suppliers shipping reference
    - 'Shipment Date' – select using the calendar icon. This date cannot be in the future. *(Note: If you are entering today's date and later receive an error that the shipment cannot be in the future, you may need to manually adjust the shipment time to be slightly in the past. This is a time zone issue)*
    - 'Expected Receipt Date' – select using the calendar icon.
    - 'Waybill / Airbill Number' – enter the tracking number / reference
    - 'Freight Carrier' – enter the 4 character shipper's SCAC code or select from the list
      - You may click on the magnifying glass to pull up a list of all SCAC. The majority of shippers should have an entry in this list
      - If your carrier is not shown, or in the case of a will call, you may use the default SCAC of 'SHIP'.
    - Select 'Submit' in the upper or lower right corner to submit the ASN
    - You should receive a notice confirming that 'Your Advance Shipment Notice <shipment number> has been submitted

- **Creating Invoices**
  - General Information for Creating Invoices
    - Only for invoicing against Direct Ship PO's (no PDC)
    - All Invoices must be based on valid Purchase Order Line Items; No miscellaneous or non-PO invoices are allowed
    - No Duplicate Invoice Numbers, No Lower Case Alphas in Invoice Numbers
    - No Negative Amounts / Credit Memos, No Adjusting or Supplemental Invoices (Original Invoice Submissions Only)
    - Validations
      - Taxes are automatically calculated and cannot be updated (Canada / Mexico Only)
      - VALID Freight Charges can be added. If Freight Charges are not valid for your Direct Ship Program, they will be automatically debited back
      - Miscellaneous Charge can be added, but is USED ONLY FOR BILLING "ENVIRONMENTAL FEES"
      - Quantities and Unit Costs can be updated, however any / all mismatches of this information between the Invoice and the Purchase Order and / or Shipment (receipt) information will cause the invoice to go ON HOLD
      - Any failed validations will result in the invoice going ON HOLD rather than being automatically approved through Accounts Payable.
- **To CREATE AN INVOICE, From the Navistar iSupplier User Home Page, Select the 'Finance' tab**
  - Click the 'Go' button on the right side of the screen next to 'Create Invoice'
  - Click 'Go' to search for PO lines to invoice. If no results are returned, click on the 'Advanced Search' button on the right side of the screen
  - Under the advanced search, select your Supplier code (if required) by searching with the magnifying glass icon. Select 'Go' to launch your search and display a list of PO line items to reference
  - Once a list of PO line items is visible, select the PO lines to invoice by clicking the 'Select' button to the left of each PO Number and Line combination.
    - Note: You may only include one purchase order per invoice
  - After you have selected the PO line items, click on the 'Add to Invoice' button
  - The PO line items selected will be shown below near the bottom of screen. Confirm the correct lines are selected and then select 'Next' in the lower right corner to move to Step 2
  - On the invoice Details screen, enter the following
    - If needed, select a Remit To Address from the listing (Hint: Typing 'A' and then hit tab will automatically look up and populate the single Remit to address for most suppliers)
    - Enter your Invoice Number, Enter the Invoice Date
    - If needed, select a Customer Tax Payer ID from the listing (Hint: Typing '4' and then hit tab will automatically look up and populate field for most suppliers)
    - If needed, adjust the line quantities or unit prices for the invoice items. Please note the comments above regarding invoice validations
    - If you need to add Freight or a valid Environmental Charge to the invoice, click the 'Add Row' button
      - Select the Proper Charge Type from the drop down menu and enter an amount
      - Repeat if needed
    - Confirm all information select 'Next' in the lower right corner to move to Step 3
    - Review the Tax information, and then select 'Next' to move to Step 4
      - Note: If the tax information is not correct, please contact [dssupplierinfo@navistar.com](mailto:dssupplierinfo@navistar.com) to advise. If the tax information is not calculating correctly, you should submit your invoices by paper to Accounts Payable
    - On Step 4, do a final review and click submit
    - A confirmation message will state 'Invoice <INVNUM> was submitted to our Accounts Payable department on <DATE>.'