Trane Technologies – ERS and iSupplier FAQ's

Consistent with Trane Technologies' commitment to continuous improvement, our suppliers are transitioning to iSupplier Portal functionality and Evaluated Receipt Settlement (ERS) or self-invoicing.

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FAQ's Overview

The information below is related to Trane Technologies' production release ERS and iSupplier Portal

Administrative (General Questions)

Q: What is the process to log in to Trane Technologies iSupplier portal?
A: To log in, suppliers need to enter their login information. Log-in credentials are sent by Trane Technologies via email during the registration process.

Q: What is the process to reset the login password in iSupplier portal?
A: Password can be reset by clicking on login assistance located under the Login button on the iSupplier Login page.

Q: Is there any scenario of auto logout by the system in iSupplier Portal?
A: The system logs out a user after ten minutes of inactive session, to improve the performance and also for security reasons. Any unsaved data entry will be lost if the session is getting inactive.

Q: Is User Registration required before accessing the Trane Technologies iSupplier Portal?
A: Yes, registration is required. This is performed by Trane Technologies for each supplier user. Login credentials are emailed to the suppliers.

Q: Is there any limit on the number of users a supplier can register on iSupplier Portal?
A: NO, there is no such limit on the number of users; however inactive users will be locked out their accounts for security reasons.

Q: What information is stored in tabs like 'Orders', 'Shipments', 'Finance', etc.?
A: In the orders tab suppliers can:
- View Purchase orders
- Acknowledge PO
- Submit change requests
- Cancel orders or shipments

In the shipments tab suppliers can:
- View overdue receipts, delivery schedules
- View, export, submit and print Advanced Shipping Notices (ASN)

In the Finance tab supplier can:
- View invoice information
- View payment information

- View Payment remittance report

Q: How could we add new users to Trane Technologies' iSupplier portal?
A: For adding new supplier user to Trane Technologies iSupplier portal you need to contact your Trane Technologies team and provide new user registration details.
Once registration process is complete, the new registered user will receive an email notification from Trane Technologies with the iSupplier portal link and user credentials.

Q: How to change the Contact information (Phone, email address) using Trane Technologies supplier Portal?
A: An email needs to be sent to Trane Technologies team (Buyer/ planner/ commodity manager) if any updates are required to be done in the contact information for the supplier user.

Q: Is training available for iSupplier portal?
A: Supplier training material is available on Trane Technologies website for self-training purpose.

Q: Where can the Notifications which are sent via email be viewed on iSupplier portal?
A: On the Trane Technologies iSupplier Portal Home Page under Worklist, click on the Full List Button and select the appropriate notification type from the drop-down list.

Q: How will the supplier be notified of any new or change Purchase order?
A: The supplier will be notified via email and also the same notification can be seen on iSupplier portal. The Trane Technologies iSupplier Portal sends workflow notifications to all registered email address (s) in the portal.

Q: Will all divisions of Trane Technoloiges be moving to iSupplier and ERS invoicing?
A: Trane Technologies sites which have been moved on Oracle EBS R12 are only eligible for iSupplier and ERS invoicing.

Q: Trane Technologies portal login page is not accepting my password, what do I need to do?
A: Try to regenerate your password. If the issue still persists then contact concerned Trane Technologies representative.

Q: iSupplier is giving me error when using the Back button of Internet explorer?
A: To return to the previous page you should always use the return to previous page link typically found towards the bottom left part of the page. You should NOT hit the back button on internet explorer as this causes a data refresh issue and cause an error page.

Q: I am unsure of how this will work. Who can I contact for further help?

A: You may contact your buyer for any order related questions, or you may contact iSupplierhelp@irco.com for any iSupplier related questions

Q: Who will send the user registration email?
A: Registration e-mails will come from: IREBSPRD@irco.com and the subject line will be *"Supplier Collaboration Network: Confirmation of Registration"*

Q: How do I conduct a search if I only have partial information?
A: If you only have a partial PO# or Release# you can do a "Wild Card" search by beginning or ending your search criteria with the percent symbol "%"

Internet Browser

Q: What are the basic Infrastructure requirements to access Trane Technologies iSupplier Portal?
A: System Requirements:
   A. PC with internet connection with minimum speed of 256 KBPS (high-speed or broadband preferred)
   B. Internet Explorer version 8 or higher
   C. Suppliers must be registered with Trane Technologies for iSupplier portal access

Q: Which browser is preferable?
A: Internet Explorer is a preferred browser for iSupplier Portal, although it works well on other browsers also like Mozilla, Chrome etc.

Purchasing

Q: What does the purchase order status mean?
A: Following list the different PO status:

Open	Purchase Order is still open. Supplier can perform shipment against this PO/ Blanket Purchase Release (PBR).
Closed	When a Purchase Order is closed. Supplier cannot perform shipment against this PO/ BPR.
Cancelled	If a Purchase Order is cancelled. Supplier cannot perform shipment against this PO/ BPR.
Accepted	The changes made in the PO are accepted by the supplier and the shipment process can be initiated.
Requires acknowledgement	Supplier needs to acknowledge the PO.
Supplier Change pending, Needs buyer acceptance	Buyer needs to respond on the change request submitted by the supplier.

Q: Does a supplier need to cancel the PO if they are unable to provide the item at the expected date?
A: If dates can't be met, a change order with the correct dates needs to be entered. The buyer/planner then needs to respond to the submitted change order.

Q: If an item is no longer available for purchase, will the Trane Technologies buyer/planner need to be contacted via email before the PO is cancelled in iSupplier?
A: A change order can be entered which goes to the buyer for acknowledgement. However, we suggest reaching out to your buyer/planner before cancelling.

Shipment

Q: What is the difference between Export+ and ASN+?
A: Export+ is a feature in iSupplier portal under Delivery Schedules, this enhancement will allow the supplier to export all the shipment information to one Excel file. Whereas, ASN+ button is used to mass upload the shipments as one ASN in the form of an excel sheet, all the information required to be filled in this sheet is available in Export+ report

Q: How can I view my pending or overdue shipments?
A: Supplier needs to login to the iSupplier portal and then navigate to the Shipment tab. You need to click "Delivery Schedules" link. From here, you can download the excel file containing the details for pending or overdue shipments.

Q. Why do I need to submit an ASN on IR iSupplier portal?
A: Advance Shipment Notice (ASN) is used to alert Trane Technologies of upcoming shipment deliveries. This helps with the receiving and planning process. ASN's help the suppliers' reconciliation or matching process for ERS BPAs.

Q. Is ASN required for every shipment?
A: Generally speaking, yes. You will be notified by the Trane Technologies site or business to supply to. ASN can be submitted on iSupplier portal either manually or using the ASN+ (to refer to ASN.) The ASN will be used by Trane Technologies to create the receipts and trigger the auto invoicing process in the case of ERS.

Q. Can we create new ASN for a shipment against which an ASN already exist?
A: Yes, you can create a new ASN if there is an open shipment quantity available. To make any changes to existing ASN you need to cancel that first in order to create a new one.

Q: If a supplier is generating a packing slip number, how will this be used on Trane Technologies iSupplier portal for ERS invoicing process?

A: Packing slip number which is entered at the header level on ASN will be used in AP invoicing as the invoice number, you can refer to this number for search for invoice and payments.

Q: Is there a particular date format used in ASN submission?
A: Yes, while submitting the ASN the date should be in this format "DD-MON-YYYY HH:MM:SS".

Q: What are the mandatory fields for ASN upload process and what data is needed to be entered?
A: Below given are the mandatory fields for the ASN upload process:
1. Online ASN submission mandatory fields with link
   - Packing Slip
   - Shipment Number
   - Shipment Date
   - Expected Shipment Date

2. ASN+ submission mandatory fields are:
   - Shipment Number
   - Shipment Date
   - Packaging Slip
   - Expected Receipt Date
   - Organization
   - PO Number
   - Revision Number
   - Line Number
   - PO Shipment Number
   - Quantity
   - UOM

Q: What are the various status messages possible for an ASN and what do they indicate?

A:

- If ASN status is showing "**Error**"- This will appear when you have entered a value in "Quantity Shipped" which is more than the quantity that you can actually ship. It is advisable to track internally how many ASNs have been created against a particular PO. Cancel the respective ASN and reenter the same with correct quantity through iSupplier Portal
- If ASN status is showing "**Pending** "- This message appears when ASN is in process with Trane Technologies. This will appear as soon as you submit the ASN.
- If ASN status is showing "**Cancelled** "- This means that the ASN has been cancelled by the supplier due to an error in the ASN.
- If ASN status is showing "**Processed** "- This message indicates that the ASN has been properly processed and no further action is required.

Q: Where is LPN/Lot/Serial number entered while performing the shipment?

A: While entering the shipment line details you have the option of entering the LPN/Lot/Serial number on the bottom right, although it's not mandatory to enter this detail for performing the shipment.

Q: Does supplier need to contact Trane Technologies after ASN submission?
A: It is not required. In case they wish to communicate they can drop an email. ASN is automatically submitted in 15 minutes, in case of any query they can contact the concerned Trane Technologies representative.

Q: How is a partial shipment handled?
A: You can create either one or more than one ASN against a particular shipment quantity, if ASN is created for a partial quantity then the ASN for the remaining shipment can be generated later. It is important to always enter the actual quantity being shipped when creating an ASN.

Q: Once the remaining shipment is ready, where is the second shipment added?
A: To add the remaining amount, a new ASN needs to be created.

Q: Does the system automatically generate the ASN number?
A: No, the ASN number needs to be manually entered. Each ASN number entered by the supplier must be unique and should not include any spaces or special characters, otherwise it might create issues in ASN processing for Invoice.

Q: Under the shipment header, there is a shipment number required field that has an asterisk. What is the number that drives this field?
A: The supplier can use any number they want in this field to tie to their records to know what was shipped. This number (for non-SOMI suppliers) will be a part of the ERS invoice number that is generated.

Q: How is the estimated delivery date used in the receiving process?
A: Estimated delivery date is used only for knowledge, it is an estimation and the changes in this date do not affect any process.

Q: What will happen if I created an ASN but not shipped the goods due to quality issues?
A: If the ASN has already been entered and the shipment is not yet done then the supplier needs to cancel the ASN and recreate a new ASN once the goods are ready to be shipped.

Q: If 10 pallets are shipped on one packing slip number per shipment, is an ASN for each individual pallet weight created, or will the ASN cover all 10 pallets?
A: Everything would be entered onto one ASN.

Q: Does the weight need to be net weight or gross weight?
A: This field is not mandatory. It shouldn't matter what you use.

Receipt

Q: Can supplier create the Receipt of the goods sent?
A: No, it will be done by Trane Technologies personnel. You can review receipt information in iSupplier portal

Invoices

Q: Who is an ERS/ PFR Supplier?
A: ERS/PFR suppliers are paid from receipt. These suppliers do not need to send invoices to Trane Technologies because an invoice will be generated when the goods are received at the Trane Technologies location.

Q: How do I create an invoice?
A: You do not create or submit an invoice as a PFR/ERS supplier. The system will generate an invoice automatically once the goods are received in by our warehouse, which will go directly to our accounts payable department to be processed for payment.

Q: How can the status of an invoice be checked?
A: Log in to iSupplier, and select the Search field drop-down from the top of the Home Page. Select Invoices and enter your invoice number in the Search field. Select Go. You can also research invoices by selecting the Invoices link from the Quick Links section.
In the Finance tab of iSupplier portal, navigate to View Invoice link, in that page you can locate the invoice by using multiple search option. Once you are able to query the Invoice, in the status column you will find the current status of the Invoice.

Q: I cannot find an invoice in iSupplier portal?
A: If you are an ERS supplier, you are no longer sending invoices. Please use the ERS remittance advice report which can be pulled on demand.

Q: If a buyer/planner has an invoice on hold, can they be contacted through the hyperlink in iSupplier with their name on it to resolve?
A: Yes, click on the buyer name link, which will bring up an email to be formatted to your specifications such as subject and content to communicate with your buyer.

Payments

Q: Will all Trane Technologies branches have payments listed for viewing?
A: The invoices and payments that you will be able to view will only be for the purchasing sites that are using iSupplier portal.

Q: How do I check the status of an invoice payment?
A: In the iSupplier portal, navigate to Finance Tab and click on View payment link. Search the payment details by putting the invoice number, this will show current payment status.

Q: Is it required to always remain online to access the latest Purchase Orders and Payments details?
A: It is not required. When Trane Technologies enters a purchase order in Oracle Purchasing, the purchase order details are available in iSupplier Portal. The details of a purchase order such as terms and conditions, lines, shipments, and attachments can be viewed from the Purchase Order Details page. In addition, supplier will also receive an email notification in their mailbox.

ERS Process

Q: What do I need to do as a supplier to use ERS?
A: The biggest change will be turning off your invoice generation process for Trane Technologies orders. If it is not possible to physically stop producing the invoices, you will need to ensure that these invoices are not sent to Trane Technologies. One suggested solution is to get the invoices mailed to an internal mailbox in your company.

Q: Do I still generate invoices and send to Trane Technologies?
A: No, Trane Technologies' ERS Invoice will replace any invoices generated from suppliers. Once you starting receiving ERS PO's, you will not need send invoices to Trane Technologies. The Purchase Orders will state "self-billing do not invoice".

Q: How will I know what you are paying me for?
A: The ERS invoice generated by Trane Technologies will be viewable in iSupplier portal. You will receive an ERS remittance advice report which will contain the self-billing Invoice created by Trane Technologies, PO number, item, item description, quantity, amount, date received and packing slip number. When creating an ASN, the information you enter at the header level on packing list field, will be middle number of the ERS invoice (ERS-12345-5678)

Q: How does ERS impact payments?
A: The ERS process relies on the agreed upon payment terms to calculate payment from the date goods are received. With our suppliers already on ERS we have found improved payment performance because the process eliminates data entry errors, partial shipment holds and other discrepancies which result in payment delays.

Q: How do I handle freight with ERS?
A: Trane Technologies' policy for inbound freight requires that goods be sent with one of Trane Technologies' preferred freight carriers. Trane Technologies has contracts with these carriers, and they bill Trane Technologies directly for freight costs. By using these carriers, you do not have to worry about reclaiming freight costs from Trane Technologies. In order for ERS to work properly, we will no longer accept pre-paid freight costs added to your invoices.

Q: What if I need to bill for additional costs for the goods?
A: The price on the ERS Invoice created by Trane Technologies is derived from the purchase order or blanket purchase agreement. Work with your Trane Technologies buyer to ensure that these additional costs are included on the purchase order.

Q: What do I do if the invoice total on the Invoice is not correct?
A: In iSupplier portal you will be able to view the ERS Invoice several weeks before it is paid. During this time, you can speak with your Trane Technologies Buyer/Planner if there are any discrepancies. It is still possible to correct discrepancies after the invoice has been paid, but identifying issues early will help ensure prompt payment. You can also proactively review purchase order pricing to avoid any pricing issues.

Q: How often will you process ERS invoices?
A: The process which creates the ERS invoice will be run on a nightly basis, so that an invoice will be created for the goods received that day.

Q: What about shipments in containers, it might take months to reach the destination? What is the invoice date in such a case?
A: With ERS, the payment terms start on receipt of the goods by Trane Technologies.

Roles

Q: What are the different types of roles and responsibility provided by Trane Technologies in iSupplier portal?
A: Trane Technologies provides two types of responsibilities to a supplier, one is the view only with which a supplier can only see all the details and another Responsibility is "Trane Technologies iSupplier Portal Full View Access" with this user can update the transactions and has the eligibility of editing and submitting new transactions.

Q: On iSupplier portal would I be able to see the data of other suppliers?
A: No, iSupplier is a secured portal hence the supplier data is not available for all to view. Suppliers can only view their data.

Notifications

Q: Where can we view the notifications of any action taken by the Buyer/Planner on the pending requests submitted by the supplier?

A: An email notification will be sent to the supplier whenever a buyer approves/rejects change or cancellation request, although it is recommended that the supplier navigates to the iSupplier portal, under Order tab to find the real time status of the Purchase Orders.

Q: What if the iSupplier user does not want to receive the emails?

A: If a supplier does not want to receive notification emails, they have the ability to modify their account preferences. They can click the Preferences hyperlink in the top right corner of the iSupplier page. At the bottom of the preferences page is the notifications section and field**: Email Style**. They can change the default value of 'HTML mail with attachments" to 'Do not send me mail" and click Apply button.