

# Supplier – Manage Supplier Data in Oracle Supplier Portal

## Introduction:

Suppliers can manage their data including profiles, bank, address and contact information using the new Oracle Supplier Portal.

This Quick Reference Guide (QRG) will show how to use the Supplier Portal to manage supplier data including:

- Bank information
- Tax information
- Address information
- Contact information
- Change request tracking





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## Supplier – Manage Supplier Data in Oracle Supplier Portal

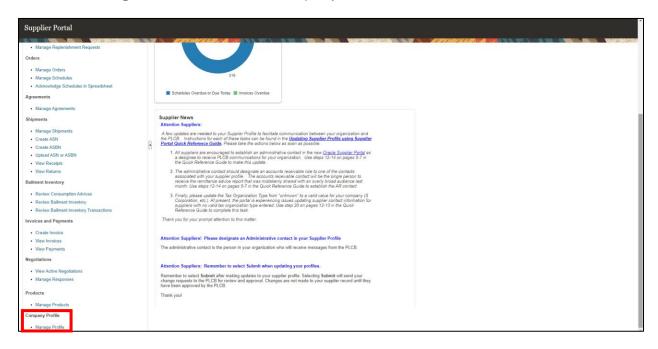
Link to eLearning video: Supplier - Update Supplier Profile Using Supplier Portal

## **Update Bank Information**

- 1. Navigate to the Welcome Springboard.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.

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	Supplier Portal	Tools Others
	APPS	
	Supplier Portal	+

3. Click Manage Profile under the Company Profile Section.







4. Click **Edit** in the top right corner.

ORACLE	
Company Profile 🕖	Edit Dor
Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and	Services
⊿ General	
Company JIM BEAM BRANDS CO	Tax Organization Type Unknown
Supplier Number 01646	Status Active
Supplier Type Licensed	Attachments None
Identification	
D-U-N-S Number	National Insurance Number
Customer Number	Corporate Web Site
SIC	
✓ Corporate Profile	
Year Established	Chief Executive Title
Mission Statement	Chief Executive Name
	Principal Title
Year Incorporated	Principal Name
Financial Profile	
Current Fiscal Year's Potential Revenue	
Preferred Functional Currency	
Fiscal Year End Month	

A warning window will appear.

5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

6. Click the **Payments Tab**, then click the **Bank Accounts Subtab**.

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dit Profile Change Request: 5001	Save	Save and Cl	ose <u>C</u> ancel
rganization Defails Tax Identifiers Addresses Contac Payments Business Classifications Products and Services	6.20.20		
Payment Method     Bank Accounts       Actions + View + Format + * X © Freeze in Detach of Wrap       Default     Payment Method	From Date	To D	ste
ACH Check		i m/d/	-





7. Click the Add (+) icon to add a new bank account.

DRACLE						SA SA
it Profile Change Request: 5001			Delete Change Request	Review Changes	Save Save and Clo	se <u>C</u> ancel
Change Descri	ption				NOMONA A I	
anzation Details Tax Identifiers Addresses Contacts Payments Business Classific ayment Methods Bank Accounts	ations Products and Services					
Actors v View v Format v + / 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2			IBAN	Currency	Bank Name	

8. Enter the following required information:

Field Name	Field Type	Input	Instructions
Country*	Dropdown	User	Select the country of the bank account.
<u>Account</u> <u>Number*</u>	Number	User	Enter the bank account number.
<u>Bank</u> <u>Name*</u>	Dropdown	User	Select the name of the bank.
<u>Bank</u> Branch*	Dropdown	User	Select the branch of the bank.
IBAN	Number	User	Enter the IBAN. This field is optional.
Currency	Dropdown	User	Select USD.
Account Type	Dropdown	User	Select the applicable option.
Description	Free-text User		Enter the appropriate description along with the full account number.
			<b>Note</b> : The full account number is required in case the team needs to validate it.

**Note**: Fields marked with a single asterisk (\*) are mandatory and must be filled out. Fields marked with double asterisks (\*\*) mean that at least one of the fields must be filled out.





9. Click **OK** in the bottom right corner of the <u>Create Bank Account Window</u> when finished.

	Create Bank Account						
	Enter account number or IBAN unle	ess account number is marked as required.					
	* Country	United States 🗸	From Date	8/4/22			
Т	* Account Number	183694021	Inactive On	m/d/yy			
В	* Bank Name	CITIBANK NA 🗸	IBAN				
N <b>v</b>	* Bank Branch	CITIBANK NA - 021272655 🗸	Currency	USD 🔻			
		Allow international payments					
	Additional Informat	tion					
	Account Name		Check Digits				JIR E
	Alternate Account Name		* Account Type	Checking 🗸			
en 8	Account Suffix		* Description	Test account			
				Create Anoth	er O <u>K</u> <u>C</u> a	ancel	

- 10. Enter [change description] in the Change Description Field.
- 11. Click Review Changes.

ORACLE			
Edit Profile Change Request: 436001	Cancel Change Request	Review Changes	Save Save and Close Cancel
Change Description     New bank account information added.      Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services		7,799,897,930,77,	
Payment Methods Bank Accounts			
Primary Account Number	IBAN	Currency	Bank Name
XXXX8392		USD	CITIBANK NA
Ø XXX4177			WILSON & MUIR BANK
Columns Hidden 8			





#### 12. Click **Submit**.

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Review Changes							Edit Submit	<u>C</u> ancel
	Change Description New ba			A VARGEORE		ALEMPA ME		8 98 9
		4						
Addresses								
	ze 🚽 Wrap							
Address Name	▲▼ Address			Phone	Address Purpose	Fax	Status	Details
P-KY-BARDS-01	DBA HEAVEN HILL BRANDS, PO BOX 729, BA	RDSTOWN, KY 40004-0729		+1 (502) 348-3921	Ordering	+1 (502) 348-0162	Active	
Columns Hidden 3								
Contacts								
View <b>v</b> Format <b>v</b> Free	ze 🔐 Detach 🚽 Wrap							
Name		▲ 🗢 Job Title	▲マ Email	▲⊽ Pł	none Administrative Contact	User Account	Status	Details
<ul> <li>Bishop, Patrick</li> </ul>			pbishop@heav	enhill.comx		9	Active	
Columns Hidden 7								
Bank Accounts								
View <b>v</b> Format <b>v</b> Free	ze 🚽 Wrap							
Primary Ad	count Number			IBAN	Currency	Bank Name	,	Details
+ xx	XX8392				USD	CITIBANK N	A	

A confirmation pop-up will appear indicating that a change request has been created.

**Note**: The change request will go through an approval process. To learn how to track the status of a change request, review the <u>Track a Change Request</u> section below.





# Update Tax Information

Suppliers are to make and submit changes to the tax information online via the Oracle Supplier Portal.

If the "Tax Reporting Name" changes, a new W-9 must be submitted with the change request.

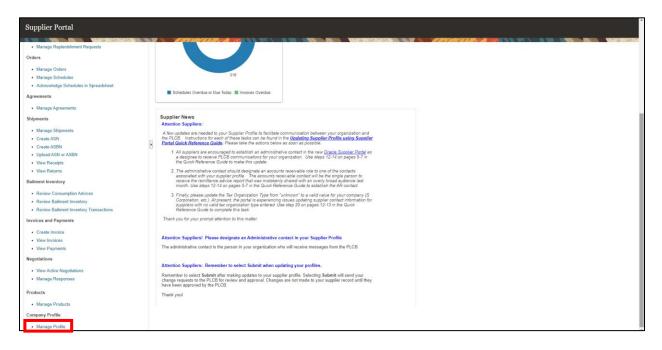
- 1. Navigate to the <u>Welcome Springboard</u>.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.

ORACLE	
	Good evening,
	Supplier Portal Tools Others
	APPS
$\begin{array}{c} 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 $	
	Supplier Portal
	Things to Finish





3. Click Manage Profile under the Company Profile Section.



4. Click Edit in the top-right corner.

ORACLE			
Company Profile ⑦			Edit Dgne
		and - water care and the water and the second s	Vallancescience and Alan
Organization Details Tax Identifiers Addresses	Contacts Payments Business Classifications Products and Services		
⊿ General			
Company	MAXON FURNITURE INC	Tax Organization Type Unknown	
Supplier Number	35686	Status Active	
Supplier Type	Supplier	Attachments None	

A warning window will appear.

5. Click Yes to continue.



The Edit Profile Change Request Screen will appear.





6. Click the **Tax Identifiers Tab**.

ORACLE									Ć	ιP	Û	CB 🗸
Edit Profile Change Request: 800	1					Selete Change Rec	uest F	Review Changes	Save	Save and	l Close	Cancel
							<b>WARDS</b>		Reality	Last Sa	ved 9/14	W21 6:09 AM
	Change	Description										
Organization Details Tax Identifiers Addresses	Contacts Payments Business (	lassifications	Products and Services									
✓ Income Tax												
Taxpayer Country	United States	•	Tax Reportin	g Name								
Taxpayer ID	125856521		Name	Contro								
	Federal reportable		Verificat	ion Date	mid/yy Be	•						
Federal Income Tax Type		w			Use withholding tax							
	State reportable		Withholding Ta	x Group		*						
Transaction Tax												
Tax Country	United States	-	Tax Registrati	ion Type		•						
Tax Registration Number	1234956215											

- 7. Select **United States** from the dropdown next to <u>Tax Country</u> under the <u>Transaction</u> <u>Tax Section</u>.
- 8. Enter the [Tax Registration Number] in the Tax Registration Number Field.

Note: All fields seen here can be updated as needed.

- 9. Enter [change description] in the Change Description Field.
- 10. Click Review Changes.

ORACLE									ΔP	¢	СВ 🗸
Edit Profile Change Request: 800	)1					[	Delete Change Request	Review Changes	Save Save an	d Close	Cancel
		997368573777.897.1028			ar serve seller at				Last Si	ived 9/14/2	21 6:09 AM
		Change Description									
Organization Details Tax Identifiers Addresses	Contacts Payments	Business Classifications	Products and Services								
✓ Income Tax											
Taxpayer Country	United States	*			Tax Reporting Name						
Taxpayer ID	125856521				Name Control						
	Federal reportable				Verification Date	πνάγγ Β	•				
Federal Income Tax Type		Ŧ				Use withholding tax					
	State reportable			Wit	thholding Tax Group		Ŧ				
Transaction Tax											
Tax Country	United States			Te	ax Registration Type		•				
Tax Registration Number	1234956215										

#### 11. Click **Submit**.

A confirmation pop-up will appear indicating that a change request has been created.

**Note**: The change request will go through an approval process. To learn how to track the status of a change request, review the <u>Track a Change Request</u> section below.





## **Update Address Information**

Suppliers can also update the address information using the Supplier Portal.

- 1. Navigate to the Welcome Springboard.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.

ORACLE	
	Good evening,
	Supplier Portal Tools Others
	APPS
	Supplier Portal

3. Select the Manage Profile Link under the Company Profile Section.

Manage Replenishment Requests	
Orders	
Manage Orders	316
Manage Schedules	
<ul> <li>Acknowledge Schedules in Spreadsheet</li> </ul>	
Agreements	Schedules Overdue or Due Today 📕 Invoices Overdue
Manage Agreements	
Shipments	Supplier News
Martin Oliveratio	Attention Suppliers:
Manage Shipments	A few updates are needed to your Supplier Profile to facilitate communication between your organization and
Create ASN	the PLCB. Instructions for each of these tasks can be found in the <u>Updating Supplier Profile using Supplier</u> Portal Quick Reference Guide. Please take the actions below as soon as possible.
Create ASBN	1. All suppliers are encouraged to establish an administrative contact in the new Oracle Supplier Portal as
Upload ASN or ASBN	a designee to receive PLCB communications for your organization. Use steps 12-14 on pages 5-7 in the Quick Reference Guide to make this update.
View Receipts	
View Returns	<ol><li>The administrative contact should designate an accounts receivable role to one of the contacts associated with your supplier profile. The accounts receivable contact will be the single person to</li></ol>
Bailment Inventory	receive the remittance advice report that was mistakenly shared with an overly broad audience last month. Use steps 12-14 on pages 5-7 in the Quick Reference Guide to establish the AR contact.
Review Consumption Advices	3. Finally, please update the Tax Organization Type from "unknown" to a valid value for your company (S
Review Bailment Inventory	Corporation, etc.). At present, the portal is experiencing issues updating supplier contact information for suppliers with no valid tax organization type entered. Use step 20 on pages 12-13 in the Quick
Review Bailment Inventory Transactions	suppliers with no valid tax organization type entered. Use step 20 on pages 12-15 in the Quick Reference Guide to complete this task.
Invoices and Payments	Thank you for your prompt attention to this matter.
Create Invoice	
View Invoices	Attention Suppliers! Please designate an Administrative contact in your Supplier Profile
View Payments	The administrative contact is the person in your organization who will receive messages from the PLCB.
Negotiations	
	Attention Suppliers: Remember to select Submit when updating your profiles.
View Active Negotiations	Remember to select Submit after making updates to your supplier profile. Selecting Submit will send your
Manage Responses	change requests to the PLCB for review and approval. Changes are not made to your supplier record until they have been approved by the PLCB.
Products	Thank you!
Manage Products	
Company Profile	





4. Click **Edit** on the top-right corner.

ORACLE			
Company Profile ⑦			Edit Dgne
		NA INA INA INA IN <b>A MANAGAMPANA MANA</b> ARANA MANAGAMPANA MANAGAMPANA MANAGAMPANA MANAGAMPANA MANA MANA MANA MANA MAN	
Organization Details Tax Identifiers Addresses	Contacts Payments Business Classifications Products and Services		
∡ General			
Company	MAXON FURNITURE INC	Tax Organization Type Unkno	nwo
Supplier Number	35686	Status Active	
Supplier Type	Supplier	Attachments None	

#### A warning window will appear.

5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

- 6. Click the Addresses Tab.
- 7. Click the Address Name Link.

ORACLE	
Edit Profile Change Request: 8001	Delete Change Request Review Changes Save and Close Cancel
	Last Saved 9/14/21 6:11 AM
Change Description	
Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services	
Actions 🔻 View 🔻 Format 💌 🕂 🥐 💥 Status Active 🔻 🏢 Freeze 🚽 Wrap	
Address Name Address	Phone Address Purpose Fax Status
P-IA-MUSCA-01 PO BOX 1109,MUSCATINE, IA 52761-0071	8008764724 Ordering Active
PA-IL-CHICA-01 BANK OF AMERICA ATTN MAXON, 13371 COLLECTION CENTER DR, CHICAGO, IL 60693-0000	5632997819 Remit to Active
Columns Hidden 3	

The Edit Address Window will appear.





8. Make changes as necessary.

**Note**: If deactivating an address, users will need to enter the date the address became inactive in the <u>Inactive Date Field</u>.

9. Click OK.

iness	Classifications Products a Edit Address: P-IA-MU				×
Freez	* Address Name * Country			Address Vurpose	Remit to
OLLE	Address Line 1	PO BOX 1109		Phone	
	Address Line 2			Fax	
	City	MUSCATINE	•	•	
	State	IA	•	•	maxonservice@maxonmail.com
	Postal Code	52761-0071		Inactive Date 9 Status II	
	Postal Code Ext.			aturos i	
	Language	•			
					O <u>K</u> <u>Cancel</u>

You are returned to the Edit Profile Screen.

- 10. Enter [change description] in the Change Description Field.
- 11. Click **Review Changes**.

ORACLE	
Edit Profile Change Request: 436001	Delete Change Request Review Changes Save Save and Close Cancel
* Change Description New Remit To address added.	





## 12. Click Submit.

ORACLE								РВ
Review Changes							Edit Submit	Cancel
	Change Description New Remit To addres	ss added.		V to lot in			888 W /-	8.98.0
		li -						
Addresses								
View View Format View Format Freez	e d Wrap ▲▼ Address			Phone Ad	dress Purpose	Fax	Status	Details
P-KY-BARDS-01	DBA HEAVEN HILL BRANDS,PO BOX 729,BARDSTOWN,	KY 40004-0729		+1 (502) 348-3921 Or	•	+1 (502) 348-0162	Active	제
Columns Hidden 3								
✓ Contacts View ▼ Format ▼ Freez	e 📆 Detach 🚚 Wrap							
Name		▲ マ Job Title	▲マ Email	▲♥ Pho	ne Administrative Contact	User Account	Status	Details
<ul> <li>Bishop, Patrick</li> </ul>			pbishop@heavenhi	ill.comx		•	Active	
Columns Hidden 7								

A confirmation pop-up will appear indicating that a change request has been created.

Note: The change request will be auto-approved after a few minutes.





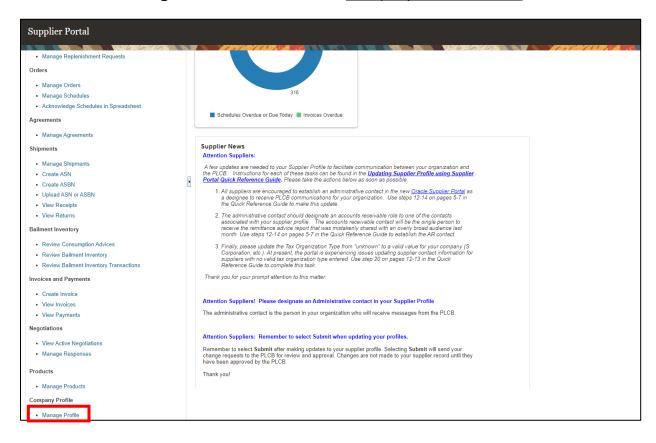
## Add a New Address

In addition to making updates to an existing address, suppliers can also add a new address if needed.

- 1. Navigate to the Welcome Springboard.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.

Good eve	ning,
Supplier Portal	Tools Others
APPS	
Supplier Portal	+

3. Select the Manage Profile Link under the Company Profile Section.







4. Click **Edit** on the top-right corner.

ORACLE			
Company Profile ⑦			Edit Dgne
		NA INA INA INA IN <b>A MANAGAMPANA MANA</b> ARANA MANAGAMPANA MANAGAMPANA MANAGAMPANA MANAGAMPANA MANA MANA MANA MANA MAN	
Organization Details Tax Identifiers Addresses	Contacts Payments Business Classifications Products and Services		
∡ General			
Company	MAXON FURNITURE INC	Tax Organization Type Unkno	nwo
Supplier Number	35686	Status Active	
Supplier Type	Supplier	Attachments None	

#### A warning window will appear.

5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

- 6. Click the Addresses Tab.
- 7. Click the Add (+) icon to add a new address.

DRACLE			⊐ ¢ ा
dit Profile Change	Request: 435001	Delete Change Request Review Changes	d Close
ganization Details Tax Ider	Change Description		
Actions  View  Format	🔹 🕂 💉 💥 Status Active 🗸 📷 Freeze 🚽 Wrap		
Address Name	Address	△マ Phone Address Purpose Fax	Status
P-FL-CORAL-02	ATTN NAHRA RODRIGUEZ,2701 S LE JEUNE RD,CORAL GABLES, FL 33134-5809	Ordering	Active
PA-FL-CORAL-02	ATTN NAHRA RODRIGUEZ,2701 S LE JEUNE RD,CORAL GABLES, FL 33134-5809	Remit to	Active
Columns Hidden 3			





Field Name	Field Type	Input	Instructions
<u>Address</u> <u>Name*</u>	Text	User	Enter the name of this address.
Country*	Dropdown	User	Enter the country.
Address 1	Text	User	Enter the first line of the address.
Address 2	Text	User	Enter the second line of the address, if applicable.
<u>City</u>	Dropdown	User	Enter the city.
<u>State</u>	Dropdown	User	Enter the state.
Postal Code	Number	User	Enter the postal code.
Address Purpose*	Checkbox	User	Select the purpose of the address: Ordering, Remit to, and/or Request For Quotation (RFQ) or Bidding.
Phone	Number	User	Enter the phone number, if any, associated with the address.
Fax	Number	User	Enter the fax number, if any, associated with the address.
<u>Email</u>	Text	User	Enter the email address, if any, associated with the address.

8. Enter the following required information for the new address:

**Note**: Fields marked with a single asterisk (\*) are mandatory and must be filled out. Fields marked with double asterisks (\*\*) mean that at least one of the fields must be filled out.





### 9. Click **OK** when finished.

Create Address	nd Services			_			×
ez * Address Name	PA-JA-MUSCA-02	* Address	<ul> <li>Ordering</li> </ul>				
LE * Country	United States 🗸	Purpose	Remit to				
Address Line 1	Po box 1110	Phone	RFQ or Biddi	800	8764724		
Address Line 2		Fax	1				
City State	Muscatine	▼ Email					
Postal Code		Inactive Date	m/d/yy	Ċ	Ö		
Postal Code Ext.		Status	Active				
Language	T						
				[	Create Another	0 <u>K</u>	<u>C</u> ancel
					_		

Note: Given below are the descriptions for the different types of address purposes:

Ordering	Use this option to indicate whether the supplier address can be used for ordering.
	If this is NOT selected, the PLCB cannot use the corresponding site while creating a PO.
Remit-To	Use this option to indicate whether the supplier address can be used for payment.
	If this is NOT selected, the PLCB cannot use the corresponding site while making an AP payment.
RFQ or Bidding	Use this option to indicate whether the supplier address can be used for RFQ or bidding.
	If this is NOT selected, the PLCB cannot use this address while creating an RFQ/Negotiation.

The system is returned to the Edit Profile Screen.





- 10. Validate that the address was added successfully.
- 11. Enter [change description] in the Change Description Field.
- 12. Click **Review Changes**.
- 13. Click Submit.
- A confirmation pop-up will appear indicating that a change request has been created.

Note: The change request will be auto-approved after a few minutes.

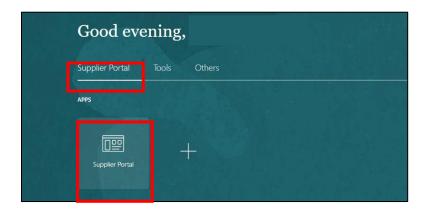




# **Creation of a New Supplier Contact**

Suppliers can also add a new contact or update an existing one using the Supplier Portal.

- 1. Navigate to the Welcome Springboard.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.



3. Click the Manage Profile Link under the Company Profile Section.

Supplier Portal	
Manage Replenishment Requests	
Orders	
Manage Orders	
Manage Schedules	316
<ul> <li>Acknowledge Schedules in Spreadsheet</li> </ul>	
Agreements	Schedules Overdue or Due Today 📕 Invoices Overdue
Manage Agreements	
Shipments	Supplier News Attention Suppliers:
Manage Shipments	A few updates are needed to your Supplier Profile to facilitate communication between your organization and
Create ASN	the PLCB. Instructions for each of these tasks can be found in the Updating Supplier Profile using Supplier
Create ASBN	Portal Quick Reference Guide. Please take the actions below as soon as possible.
Upload ASN or ASBN	<ol> <li>All suppliers are encouraged to establish an administrative contact in the new <u>Oracle Supplier Portal</u> as a designee to receive PLCB communications for your organization. Use steps 12-14 on pages 5-7 in</li> </ol>
View Receipts	the Quick Reference Guide to make this update.
View Returns	<ol><li>The administrative contact should designate an accounts receivable role to one of the contacts associated with your supplier profile. The accounts receivable contact will be the single person to</li></ol>
Bailment Inventory	associated win your supplemproline. The accounts reservance contact win be the single person to receive the remittance advice report that was midatedney shared with an overly broad advicence last month. Use steps 12-14 on pages 5-7 in the Quick Reference Guide to establish the AR contact.
Review Consumption Advices	3. Finally, please update the Tax Organization Type from "unknown" to a valid value for your company (S
Review Bailment Inventory	Corporation, etc.). At present, the portal is experiencing issues updating supplier contact information for suppliers with no valid tax organization two entered. Use step 20 on pages 12-13 in the Quick
<ul> <li>Review Bailment Inventory Transactions</li> </ul>	Reference Guide to complete this task.
Invoices and Payments	Thank you for your prompt attention to this matter.
Create Invoice	
View Invoices	Attention Suppliers! Please designate an Administrative contact in your Supplier Profile
View Payments	The administrative contact is the person in your organization who will receive messages from the PLCB.
Negotiations	
View Active Negotiations	Attention Suppliers: Remember to select Submit when updating your profiles.
Manage Responses	Remember to select Submit after making updates to your supplier profile. Selecting Submit will send your
- manage responses	change requests to the PLCB for review and approval. Changes are not made to your supplier record until they have been approved by the PLCB.
Products	Thank you!
Manage Products	
Company Profile	
Manage Profile	





4. Click the Edit Button on the top-right corner.

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Company Profile ②		Im boo
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Organization Details Tax Identifiers Addresses	Contacts Payments Business Classifications Products and Services	
⊿ General		
Company	MAXON FURNITURE INC	Tax Organization Type Unknown
Supplier Number	35686	Status Active
Supplier Type	Supplier	Attachments None

#### A warning window will appear.

5. Click **Yes** to continue.



The <u>Edit Profile Change Request Screen</u> will appear.

- 6. Click the **Contacts Tab**.
- 7. Click the Add (+) Icon to add a new contact.

Edit Supplier: MAXON FURNITURE INC 💿 ★				Save	Sub <u>m</u> it <u>C</u> ancel
Petile Advesses Sale Contacts Qualifications				1940-7479.107 <b>8</b> 0	
Actors 🔻 Vew 👻 Format 💘 🕂 🐺 🔛 Freeze 🔛 Detach 🚽 Wrap Status Active 💌					
Name	Job Title	Email	Administrative Contact	User Account	Status
Pleady, Carl		xbardyo@maxonmail.com		~	Active
PMavis, Renee		xmaxoncredit@maxonmail.com		~	Active
Columns Hidden 8					

The <u>Create Contact Screen</u> will appear.





8. Enter the required contact information:

Field Name	Field Type	Input	Instructions
First Name*	Text	User	Enter the contact's first name.
Last Name*	Text	User	Enter the contact's last name.
Phone	Number	User	Enter the contact's phone number.
Mobile	Number	User	Enter the contact's mobile phone number.
Email	Text	User	Enter the contact's email address.

Note: Mandatory fields are denoted by an asterisk (\*).

9. Click the Select and Add Button under Contact Addresses.

Create Contact ⑦				Save
Salutation Y Phon		•		
* First Name Tom 11 Mobil	1	▼ 53299	7820	
Middle Name Fa		•		
* Last Name Jones Ema	tom.jone@r	naxion.com		
Job Title Statu	Active 🗸			
Administrative contact				
Additional Information				
# Contact Addresses				
Actors 🔻 Veer 👻 Format 💌 💥 🔝 📄 Freeze 📈 Detach 🚽 Wrap				
Address Name Address				
No data to display.				
Columns Hidden 4				

The Select and Add: Addresses Box will appear.





- 10. Select the line address to link to the new supplier contact.
- 11. Click **Apply**, then click **OK**.

elect and Ad	ld: Addresses			×
Search				
Address				
			Search	Reset
View 🔻 Forr	nat 👻 📣 Wrap			
Address Name	▲▼ Address		Address Purpose	
P-IA-MUSC/	-01 PO BOX 1109,N	IUSCATINE, IA 52761-0071	Ordering	
PA-IL-CHIC/	-01 BANK OF AMER	RICA ATTN MAXON, 13371 (	C Remit to	
PA-JA-MUS	CA-02 Po box 1110,MU	JSCATINE, IA 52761*0071	Ordering	
Rows Selecte	d 2			
Rows Selecte	d 2		App <u>ly</u> O <u>K</u>	Cancel





### 12. Select the **User Account Checkbox** under <u>User Account</u>.

13. Select the applicable role(s) from the Roles Tab.

**Note**: Key roles and their descriptions are as follows:

Role Title	Has access to	Does NOT have access to
PLCB Supplier Portal Self- Service JR	<ul> <li>Access Supplier Portal overview</li> <li>Manage supplier profile</li> </ul>	Create invoices
PLCB Supplier Portal Invoice Transaction JR	Create invoices	<ul> <li>Acknowledge POs, issue ASNs, manage shipments</li> </ul>
PLCB Supplier Portal Purchase Order Transaction JR	<ul> <li>Acknowledge POs</li> <li>Create ASNs</li> <li>Upload ASNs</li> <li>Manage shipments</li> </ul>	Create invoices
PLCB Supplier Portal Bidder JR	<ul><li>View active negotiations</li><li>Manage responses</li></ul>	<ul> <li>Acknowledge POs, issue ASNs, manage shipments</li> </ul>
PLCB Supplier Portal Product Administrator JR	Manage products	<ul><li>Create invoices</li><li>Purchase orders</li></ul>
PLCB Supplier Portal Inventory Manager JR	<ul> <li>Review consumption advices</li> </ul>	Create invoices

14. Click OK.

Create Contact					×
Salutation	~		Phone	•	
* First Name	Tom	±	Mobile	1 🔹 53299	7820
Middle Name			Fax	•	
* Last Name	Jones		Email	kevin.mante@cmg-change	.com
Job Title			Status	Active 🗸	3
	Administrative contact				6
Contact Address	es				
Actions View View For	nat 🕶 🗙 📑 🗐	Freeze 🔐 Detach 🚽	Wrap		
Address Name	Address		Phone	Address Purpos	e Status
PA-IL-CHICA-01	BANK OF A	IERICA ATTN MAXON, 13371	COLLECTION 563299781	9 Remit to	Active
Columns Hidden 5					
User Account     Roles Data Access	F E-mail is	equired when requesting a use	r		
Actions <b>v</b> View <b>v</b> F	ormat 🔻 🗶 🖪	Freeze 🔐 Detach	Wrap		
Role	▲▽	Description			
PLCB Supplier Portal	Inventory Manager JR	Role provides access to - Revi	w consigned inventory - Review	v consumption advices	·
PLCB Supplier Portal	Invoice Transaction JR	Role provides access to - Crea	e invoices		
PLCB Supplier Portal	Purchase Order Trans	Role provides access to -Ackn	wiedge POs -Issue ASNs -Man	age shipments	-
					Create Another OK Cancel





- 15. Verify that the user was successfully added.
- 16. Enter [change description] in the Change Description Field.
- 17. Click Review Changes.

ORACLE	
Edit Profile Change Request: 5001	Delete Change Request Review Changes Save Save and Close Cancel
Change Description	
Payment Methods Bank Accounts	
Primary Account Number	IBAN Currency Bank Name USD AMERICAN BANK
Columns Hidden 8	

#### 18. Click Submit.

A confirmation pop-up will appear indicating that a change request has been created.

**Note**: The change request will be auto-approved after a few minutes.

To edit an existing contact, users will need to select the contact line and click the **Pencil Icon**.

ORACLE										ЪŶ
lit Profile Change Reques	st: 436001					De	lete Change Request	Review Changes	Save Save a	nd Close
					100			777967719207		-
	* Change Description									
ganization Details Tax Identifiers Add	dresses Contacts Payments Bu	siness Classifications	Products and S	Services						
Actions  View  Format	🖉 🗶 Status Active 🗸 🏢	Freeze 🔐 Detach								
	Active V	Preeze all Detach						Administrative		
Name			▲▽	Job Title	▲▽	Email 4	≥⊽ Phone	Contact	User Account	Status
Andrew, Kevin						kandrew@heavenhill.comx			0	Active
Bishop, Patrick						pbishop@heavenhill.comx			9	Active
Bockting, Terra				Invoicing Assistant		Tbockting@heavenhill.comx	5023507653		0	Active
Cecil, Annette						acecil@heavenhill.comx	5023379465 x465	0	0	Active
Deronsle, Mario						mderonsle@heavenhill.comx			0	Active
Dhakal, Pushpa				Invoicing Assistant		pdhakal@heavenhill.comx			0	Active
Fisher, John						JFISHER@HEAVENHILL.COMx	5023379542 x542		0	Active
Hagan, Rose				Purchasing			5023379413			Active
Hagan, Roseann				PURCHASING		rhagan@heavenhill.comx	5023379413		0	Active
Hall, Gail				Senior Accountant		ghall@heavenhill.comx	+1 (502)337 x95		0	Active
Holt, Marsha						mholt@heavenhill.comx	5023379450		0	Active
									0	

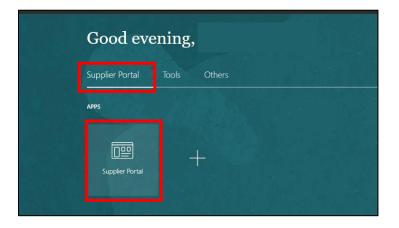




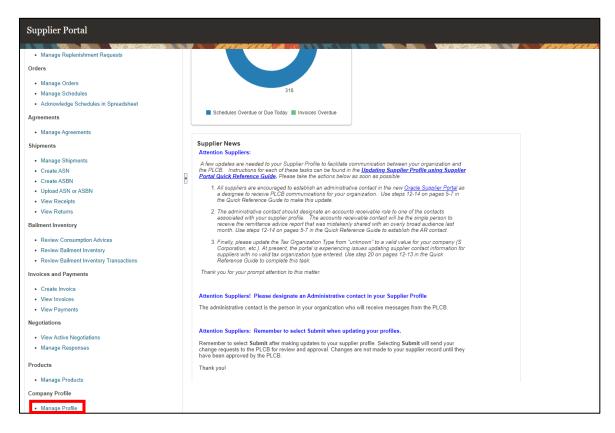
# Track a Change Request

Below are the steps to track the status of a change request that is pending the PLCB's approval.

- 1. Navigate to the Welcome Springboard.
- 2. Click Supplier Portal Tab, then click the Supplier Portal Tile.



3. Click the Manage Profile Link under the Company Profile Section.







4. Review the <u>Request Status Field</u> to check the status of the change request.

Note: In this example, a change request is already in progress.

5. Users can also click the **Last Change Request Link** to review the change request details.

**Note**: Users are advised to use one change request per profile update for easy tracking. Users cannot start a new change request until the previous one has been closed.

ORACLE							þ ð
Company Profile ⑦					Ca	ncel Change Reques	t Edit Dor
There is a profile change request pending approval. You may edit to make additional changes.							
	Requested By	Hagan Bre	nda	ALL AND A	Change Description	added a new contact.	W7 8 8
Last Change Request 444001 Request Status Pending Approval	Request Date		110101				
Request surves i cronil Approver							
Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and	d Services						
View 👻 Format 👻 Status Active 💙 📴 Freeze 🖃 Detach 🚽 Wrap							
					Administrative		
Name		▲▽	Email 🛆	♥ Phone	Contact	User Account	Status
Credit And Collections, Gbs			GBS_CreditandCollections@beam			0	Active
Culver, Megan	Financial Analy	st - KY Pla	Megan.Culver@BeamSuntory.com	x 5022152506		0	Active
Customer Solutions, Supply Chain			andrea.chavez@beamsuntory.com	x		0	Active
Dhakal, Pushpa	Credit and Colle	ections An	Pushpa.Dhakal@beamsuntory.com	IX		0	Active
Faller, David	Director Logistic	cs - Ameri	david.faller@beamglobal.comx	5022152373		0	Active
Gholson, Logan	Inventory Accou	unting Ana	logan.gholson@beamsuntory.com	5022152235		0	Active
Hagan, Brenda	Billing Analyst		Brenda.Hagan@beamsuntory.com	ĸ		<	Active
Iles, Lexie			Lexie.lles@beamsuntory.com			0	Active
Jarboe, Amy	Credit Temp		amy.jarboe.accountemps@beams.			0	Active
Johnson, Leslie	Inventory Reple	n CoOrd	leslie.johnson@beamsuntory.comx	5028558447		0	Active
Lankford, Josh	Sr Credit Analys	st	josh.lankford@beamsuntory.comx			0	Active

