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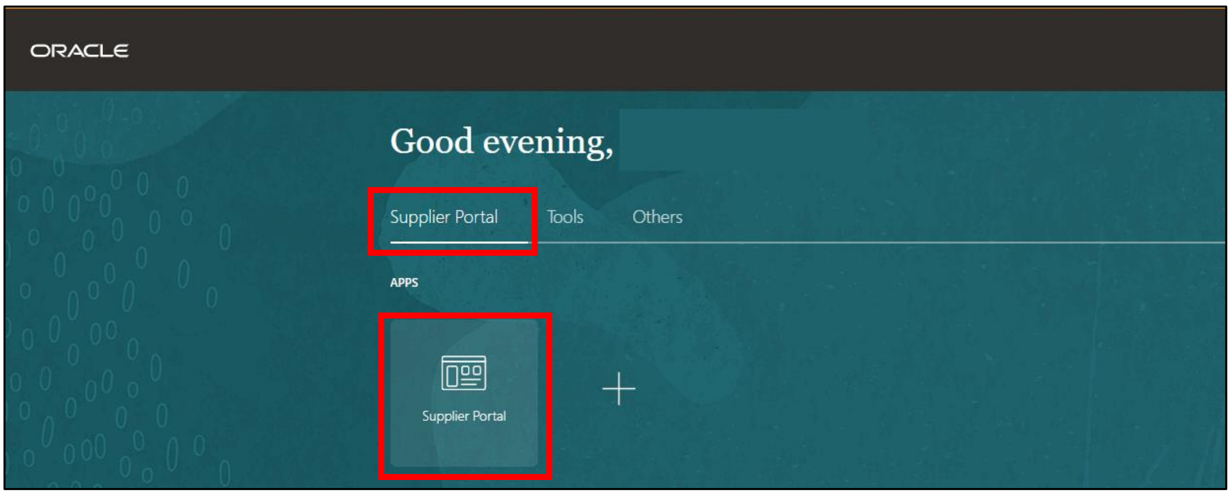
Link to eLearning video: [Supplier - Update Supplier Profile Using Supplier Portal]

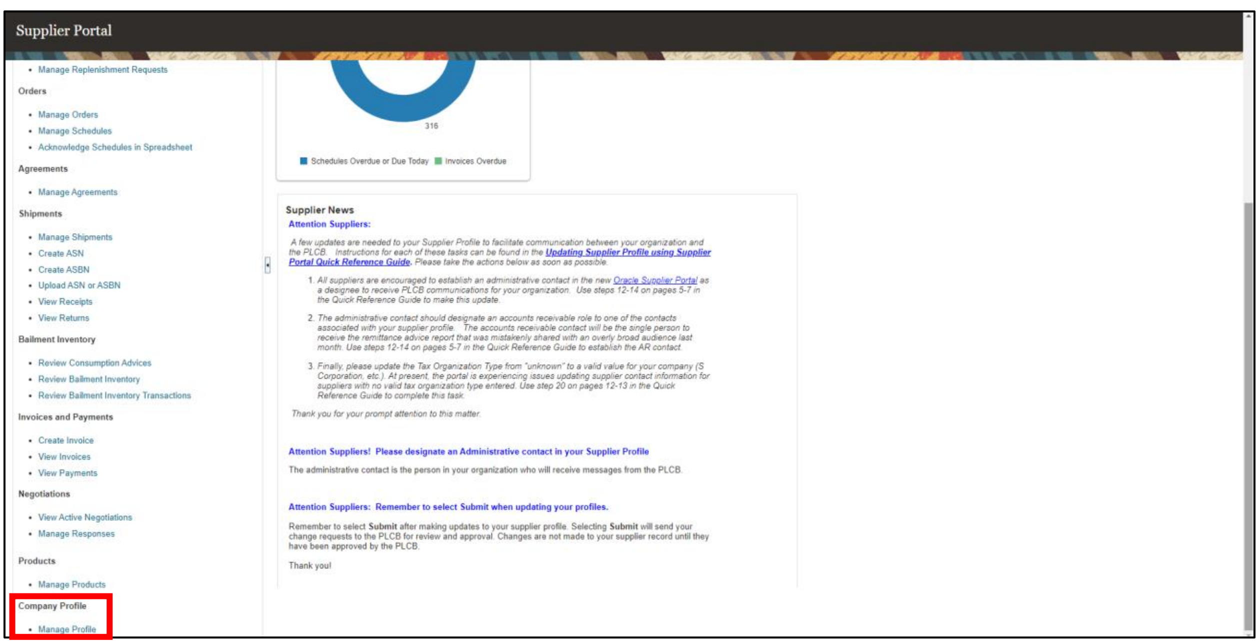
Update Bank Information

1. Navigate to the Welcome Springboard.

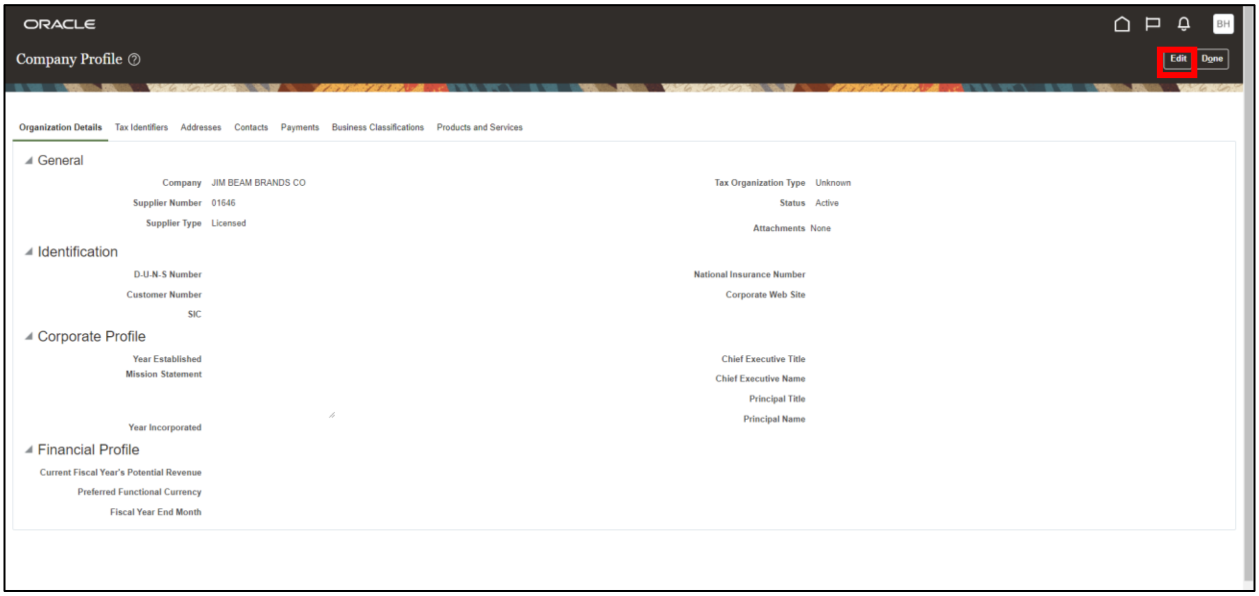
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

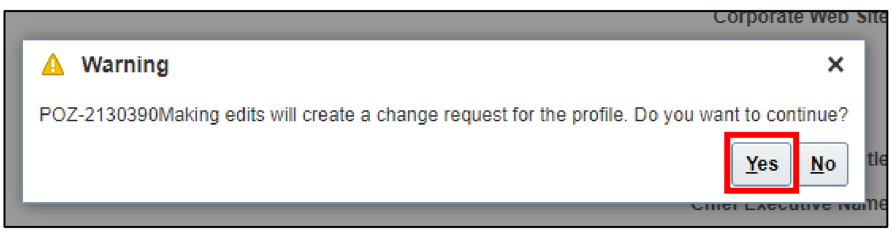


4. Click **Edit** in the top right corner.



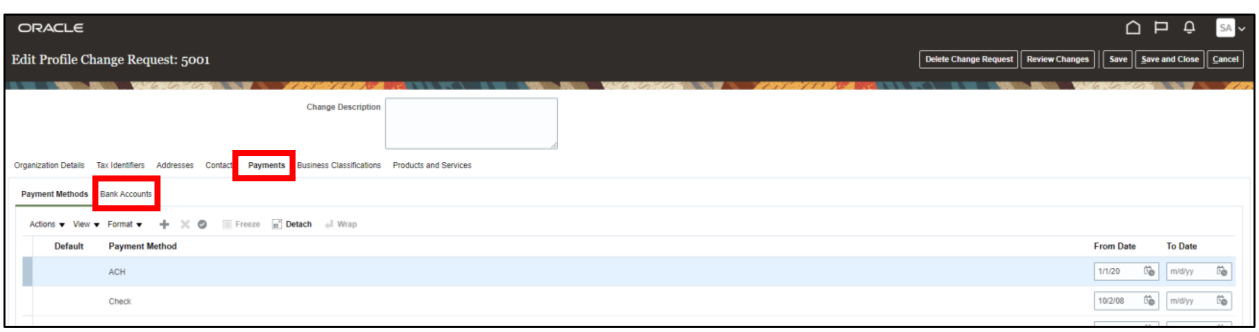
A warning window will appear.

5. Click **Yes** to continue.

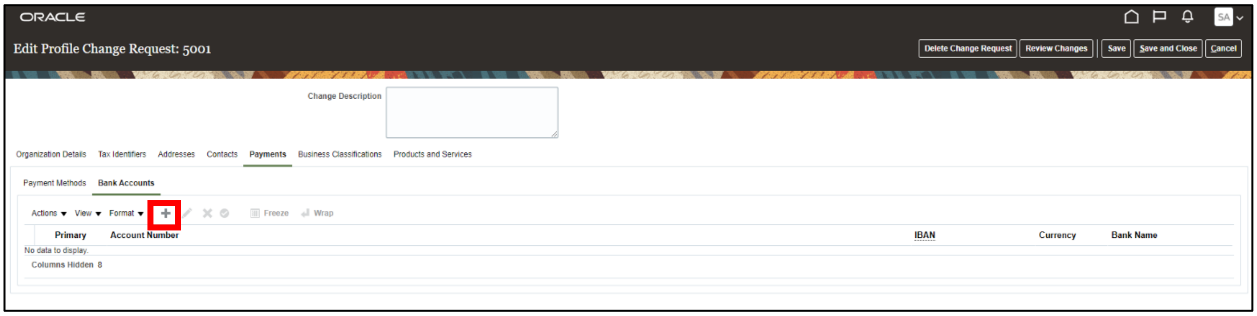


The Edit Profile Change Request Screen will appear.

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



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

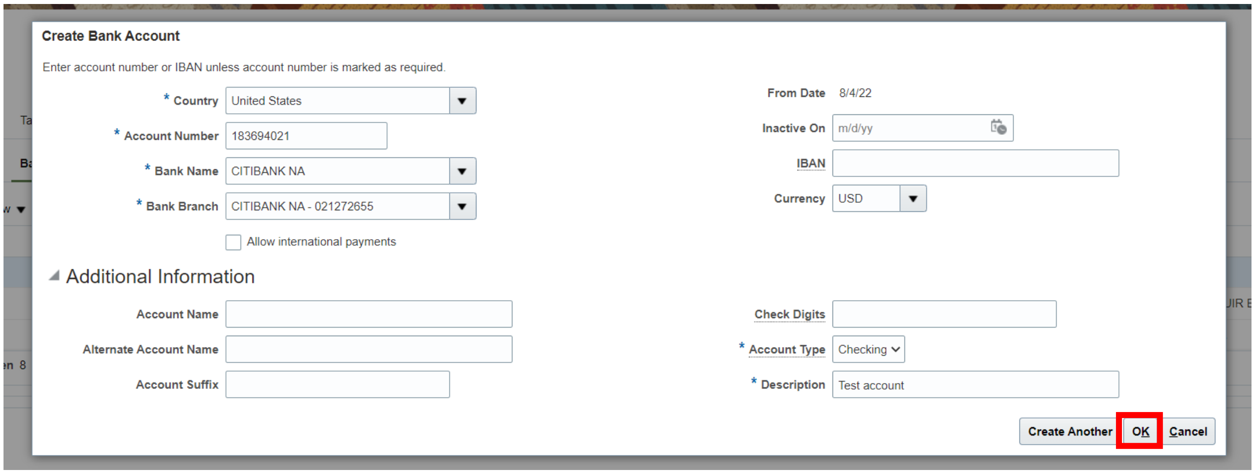


8. Enter the following required information:

Field Name	Field Type	Input	Instructions
Country*	Dropdown	User	Select the country of the bank account.
Account Number*	Number	User	Enter the bank account number.
Bank Name*	Dropdown	User	Select the name of the bank.
Bank 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. **Note**: The full account number is required in case the team needs to validate it.

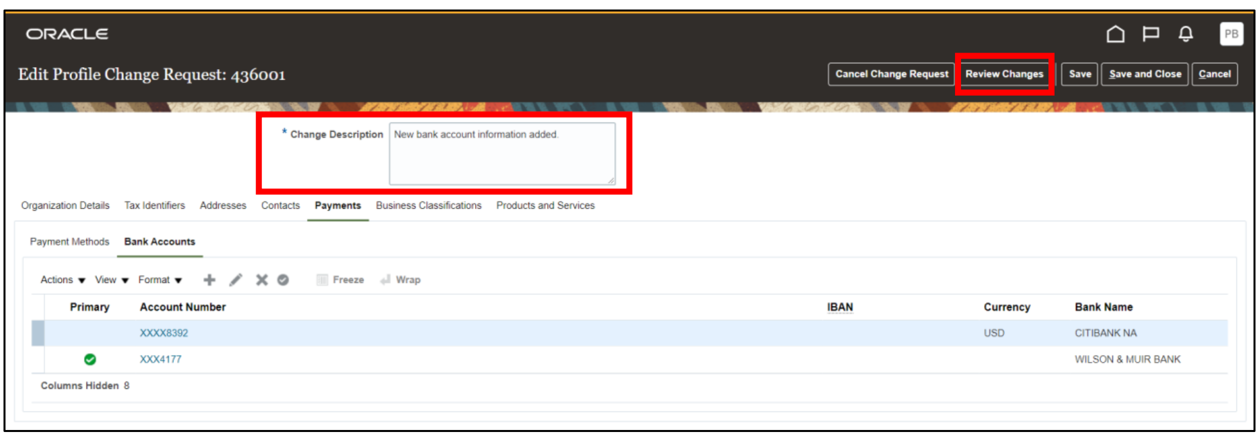
Note: Fields marked with a single asterisk (*) are mandatory and must be filled out. Fields marked with double asterisks (**) mean that at least one of the fields must be filled out.

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

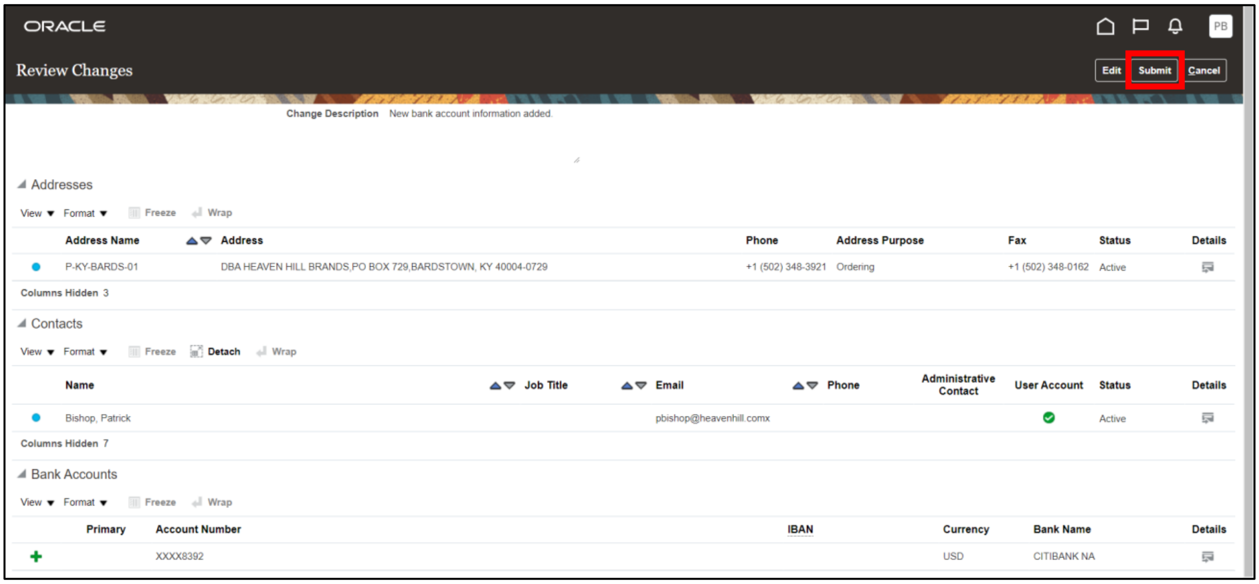


10. Enter [change description] in the Change Description Field.

11. Click **Review Changes**.



12. 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 Track a Change Request section below.

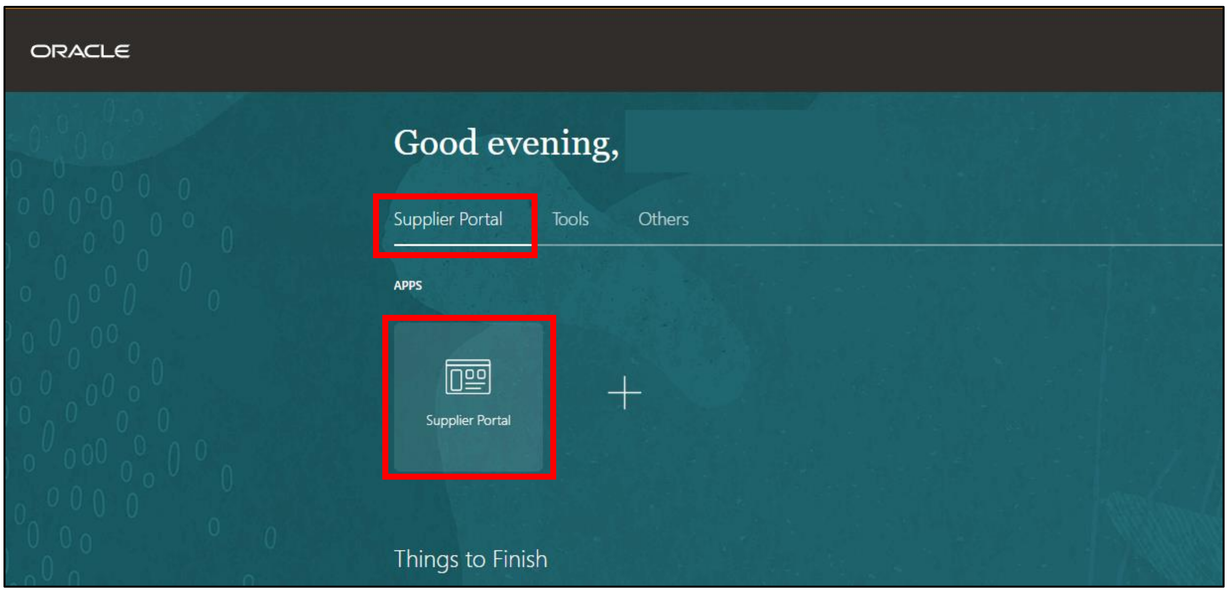
Update Tax Information

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

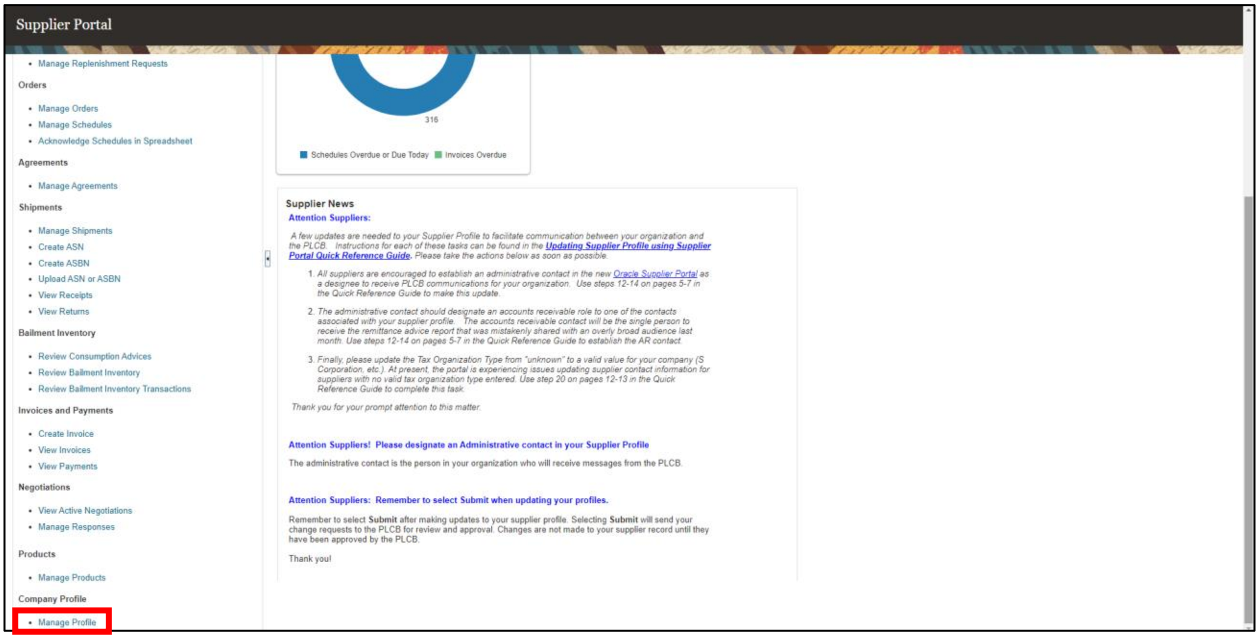
If the “Tax Reporting Name” changes, a new W-9 must be submitted with the change request.

1. Navigate to the Welcome Springboard.

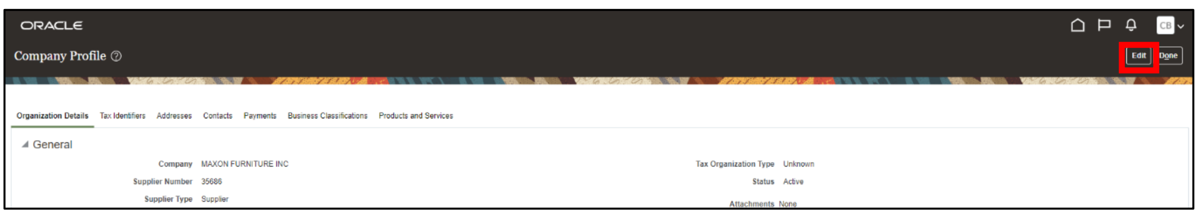
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

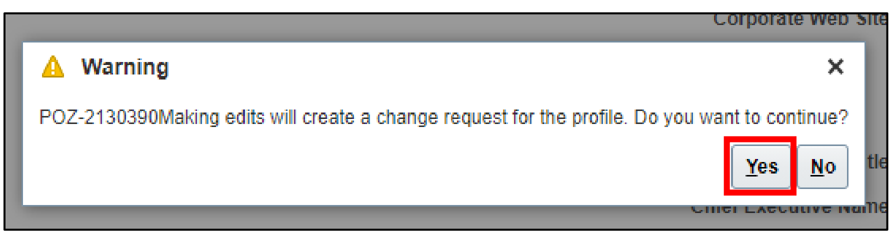


4. Click **Edit** in the top-right corner.



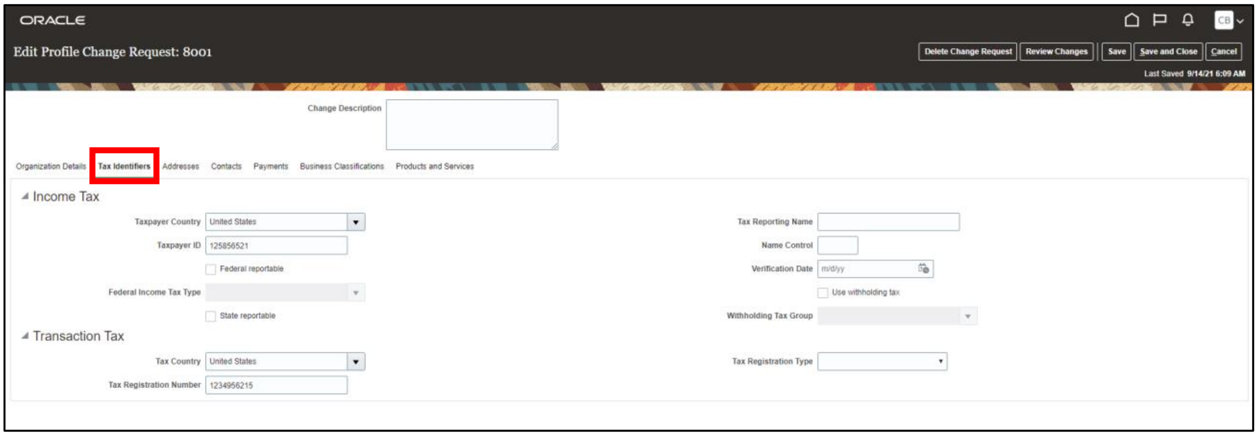
A warning window will appear.

5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

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



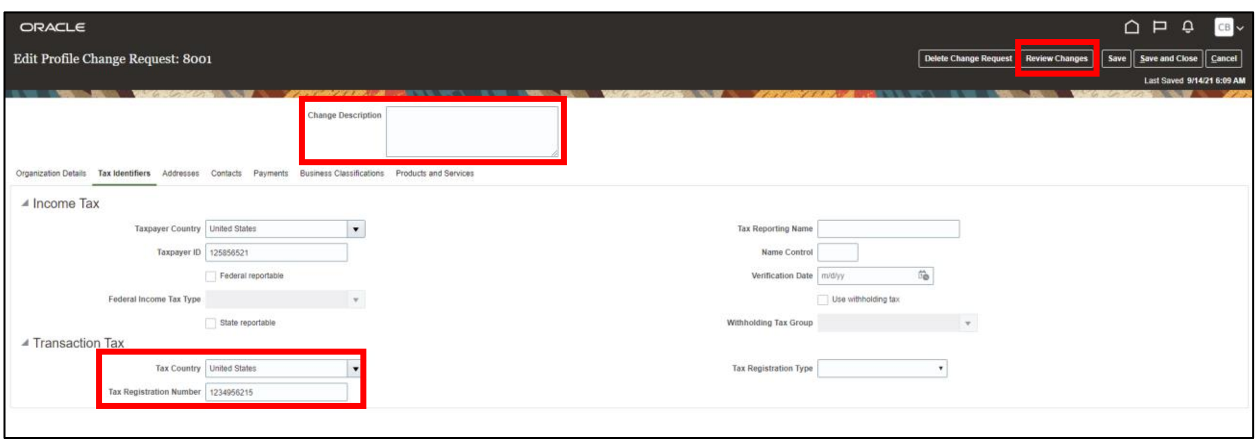
7. Select **United States** from the dropdown next to <u>Tax Country</u> under the <u>Transaction Tax Section</u>.

8. Enter the [Tax Registration Number] in the <u>Tax Registration Number Field</u>.

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

9. Enter [change description] in the <u>Change Description Field</u>.

10. Click **Review Changes**.



11. Click **Submit**.

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

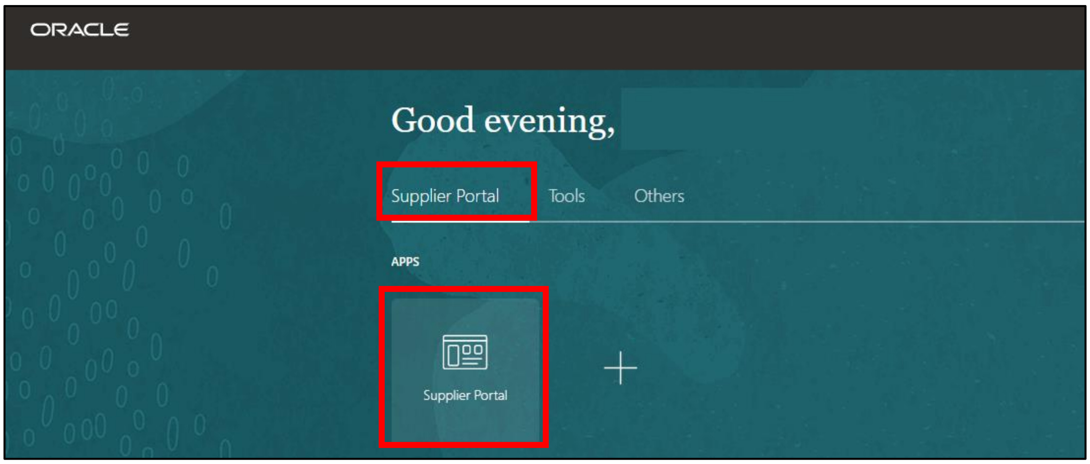
Note: The change request will go through an approval process. To learn how to track the status of a change request, review the [Track a Change Request](#) section below.

Update Address Information

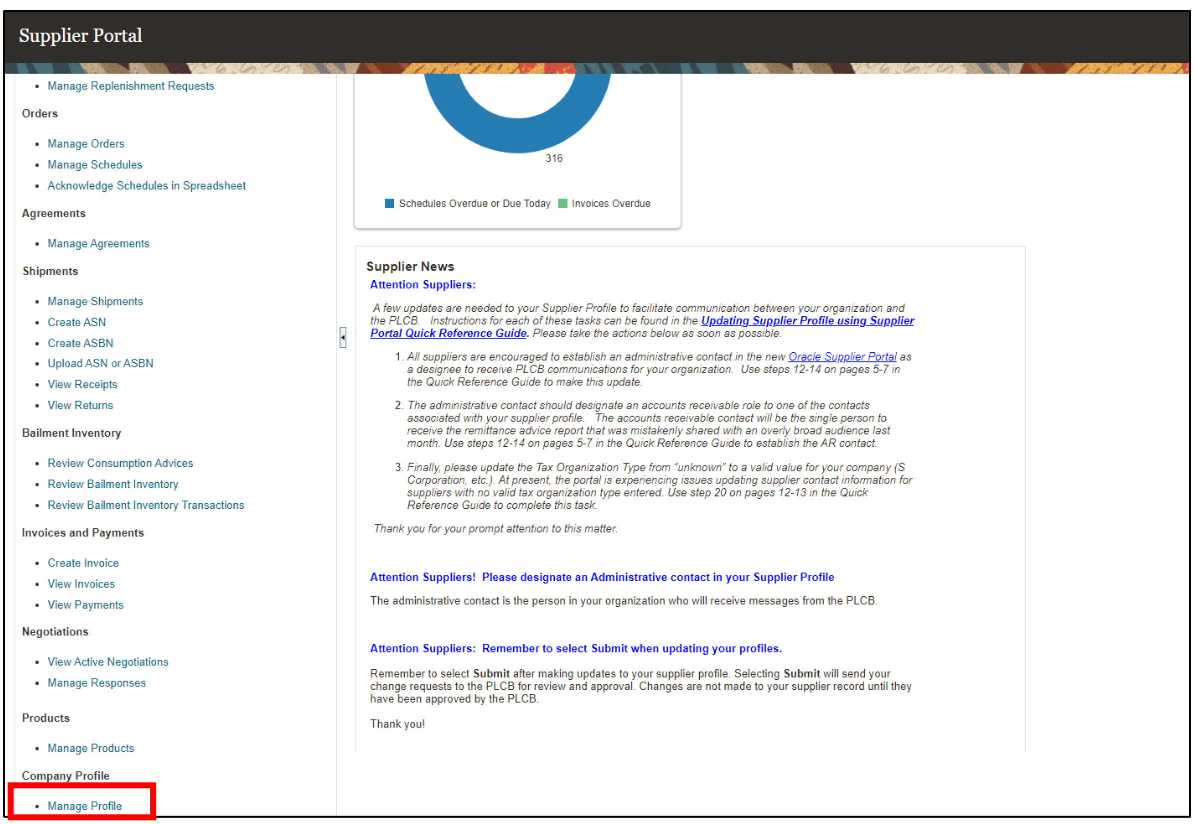
Suppliers can also update the address information using the Supplier Portal.

1. Navigate to the Welcome Springboard.

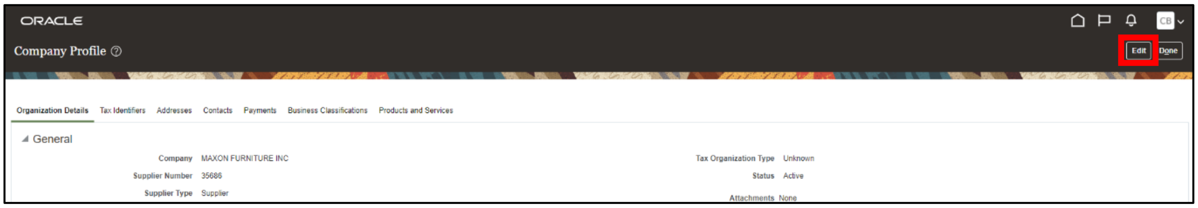
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

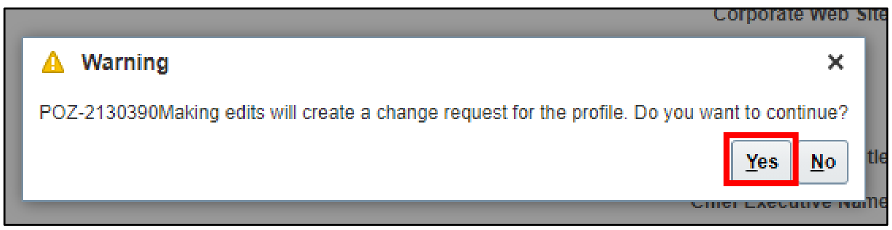


4. Click **Edit** on the top-right corner.



A warning window will appear.

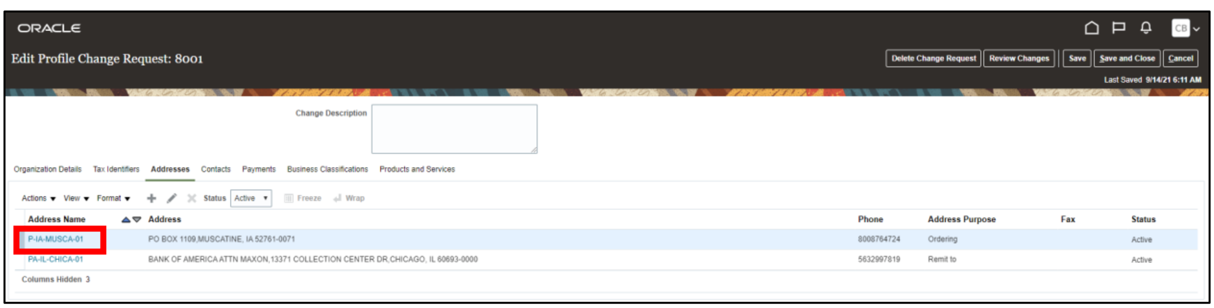
5. Click **Yes** to continue.



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

6. Click the **Addresses Tab**.

7. Click the **Address Name Link**.

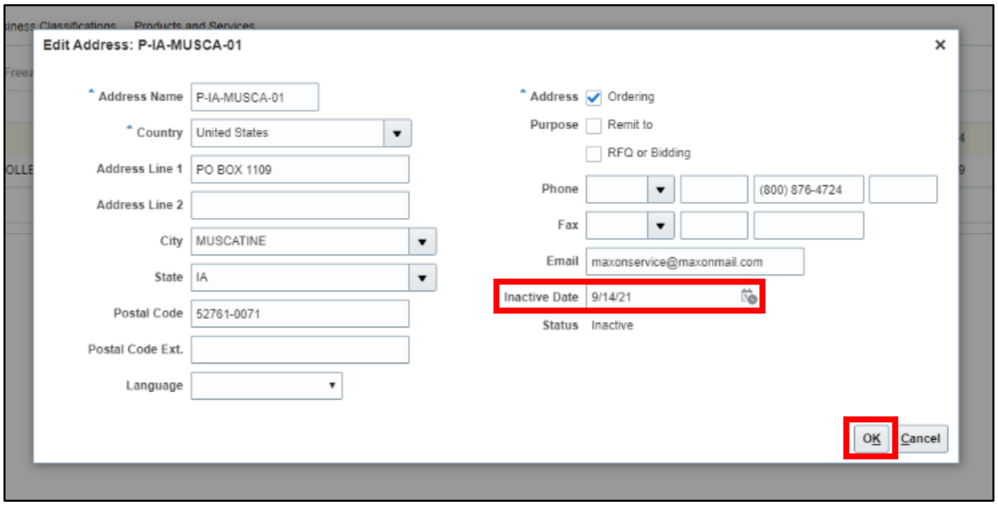


The <u>Edit Address Window</u> will appear.

8. Make changes as necessary.

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

9. Click **OK**.

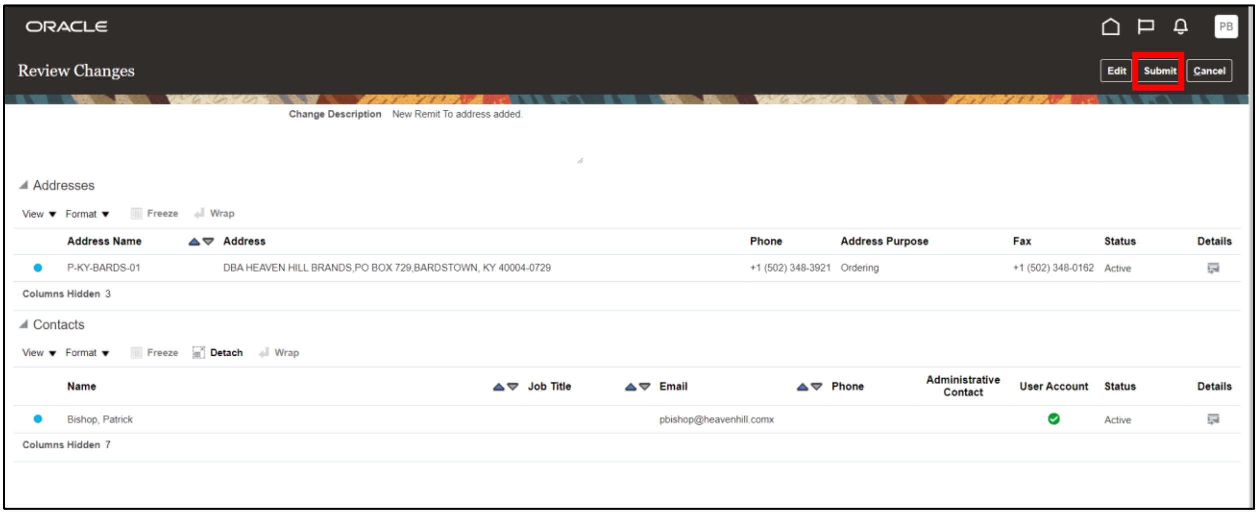


You are returned to the Edit Profile Screen.

10. Enter [change description] in the Change Description Field.

11. Click **Review Changes**.

12. Click **Submit**.



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

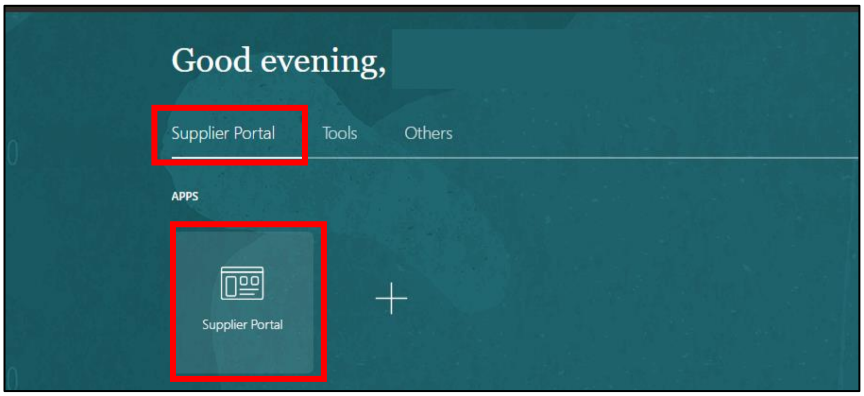
Note: The change request will be auto-approved after a few minutes.

Add a New Address

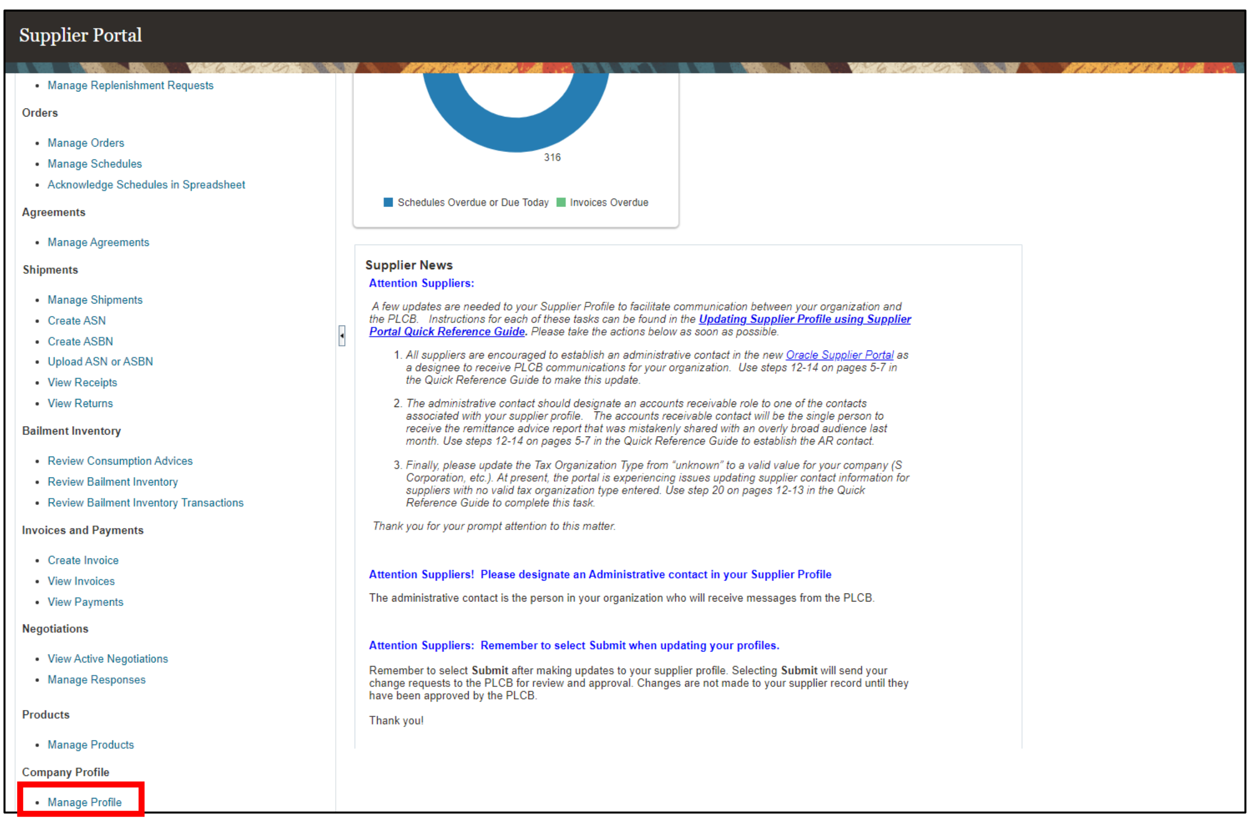
In addition to making updates to an existing address, suppliers can also add a new address if needed.

1. Navigate to the Welcome Springboard.

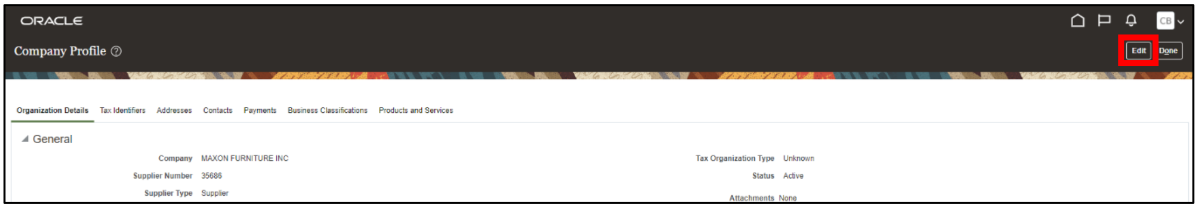
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

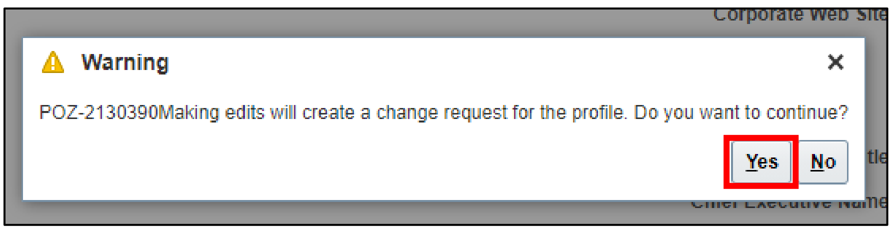


4. Click **Edit** on the top-right corner.



A warning window will appear.

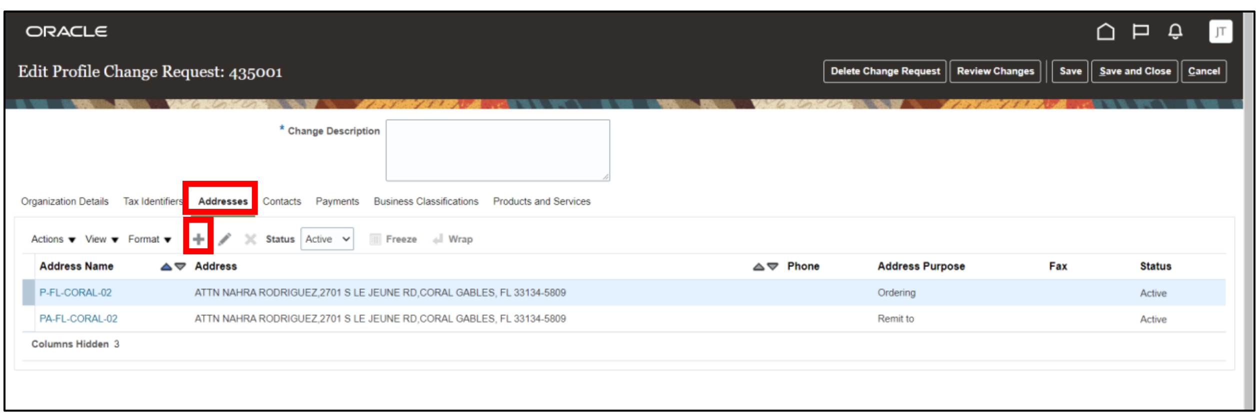
5. Click **Yes** to continue.



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

6. Click the **Addresses Tab**.

7. Click the **Add (+) icon** to add a new address.

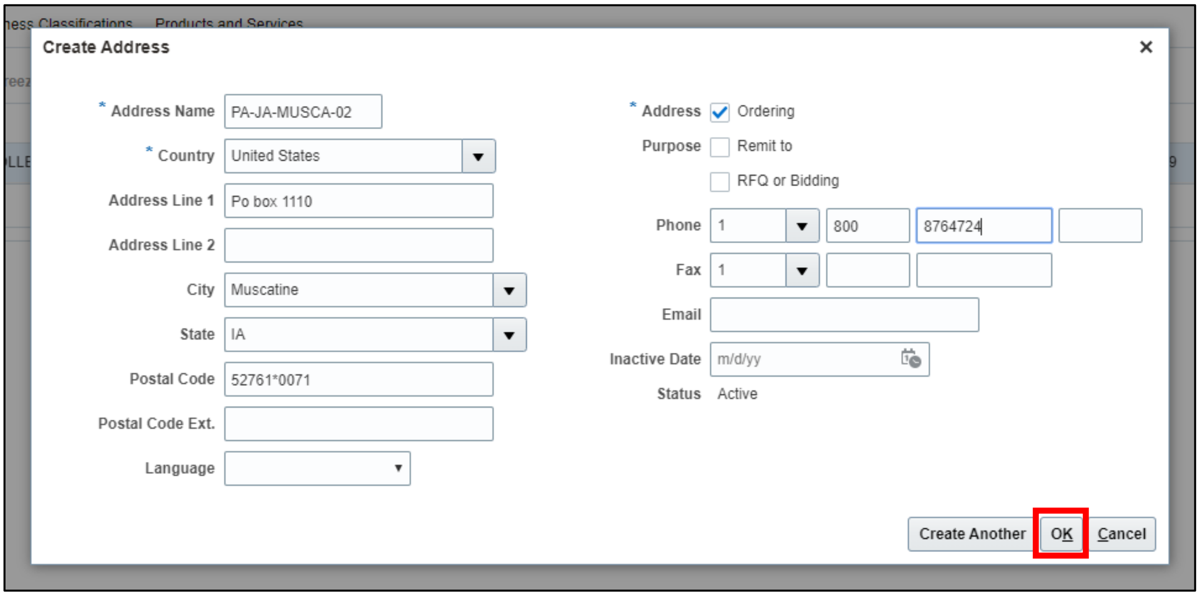


8. Enter the following required information for the new address:

Field Name	Field Type	Input	Instructions
Address Name*	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.
City	Dropdown	User	Enter the city.
State	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.
Email	Text	User	Enter the email address, if any, associated with the 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.



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.

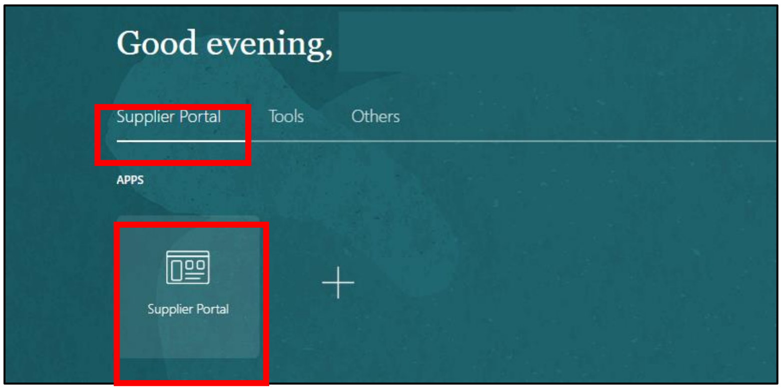
Note: The change request will be auto-approved after a few minutes.

Creation of a New Supplier Contact

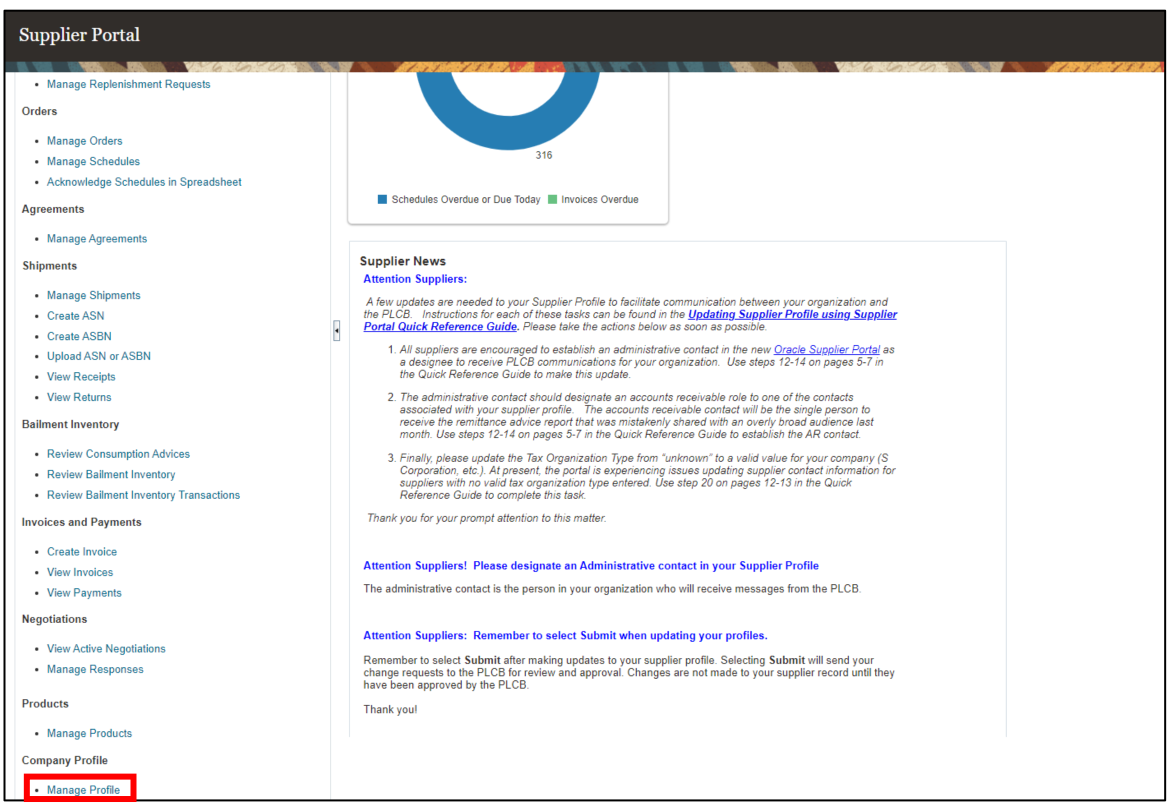
Suppliers can also add a new contact or update an existing one using the Supplier Portal.

1. Navigate to the Welcome Springboard.

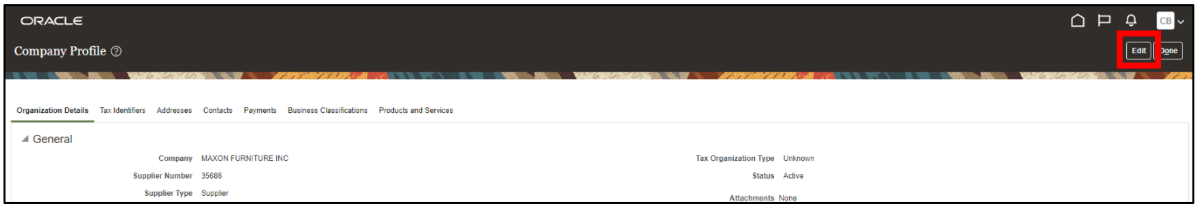
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

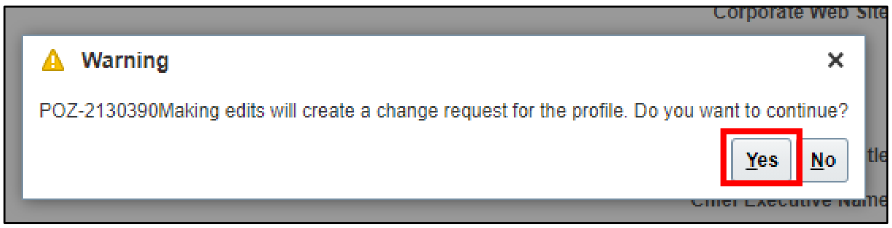


4. Click the **Edit Button** on the top-right corner.



A warning window will appear.

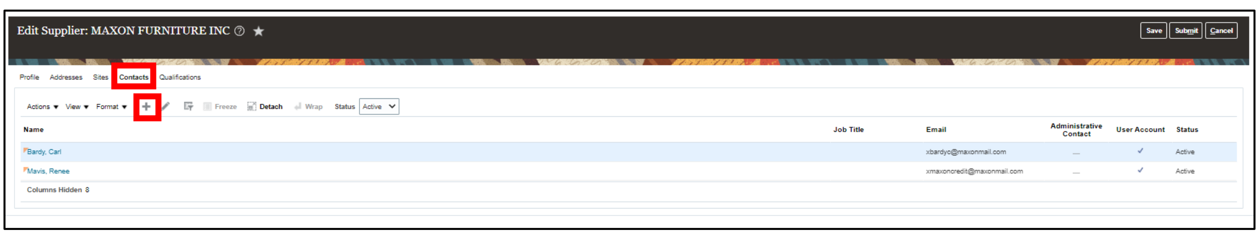
5. Click **Yes** to continue.



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.



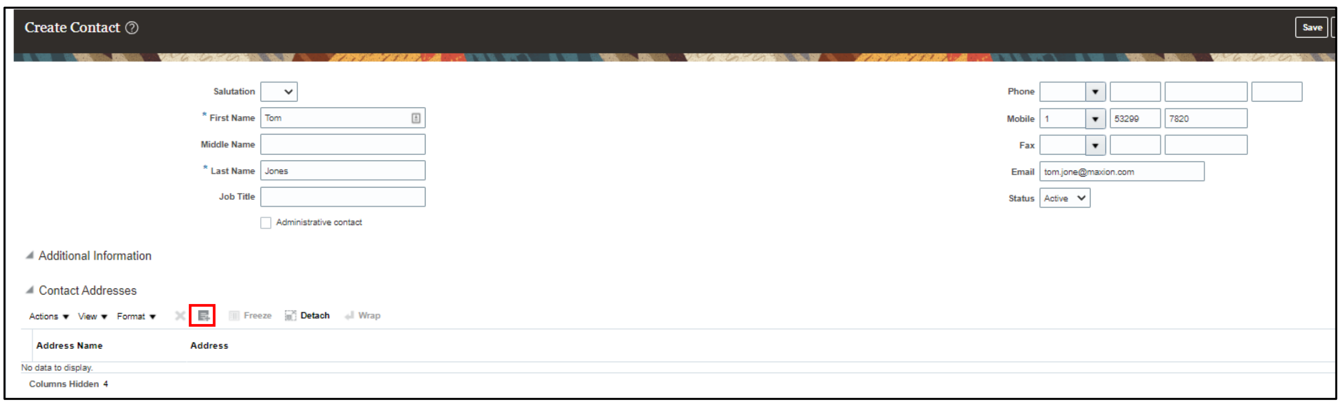
The <u>Create Contact Screen</u> will appear.

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 (*).

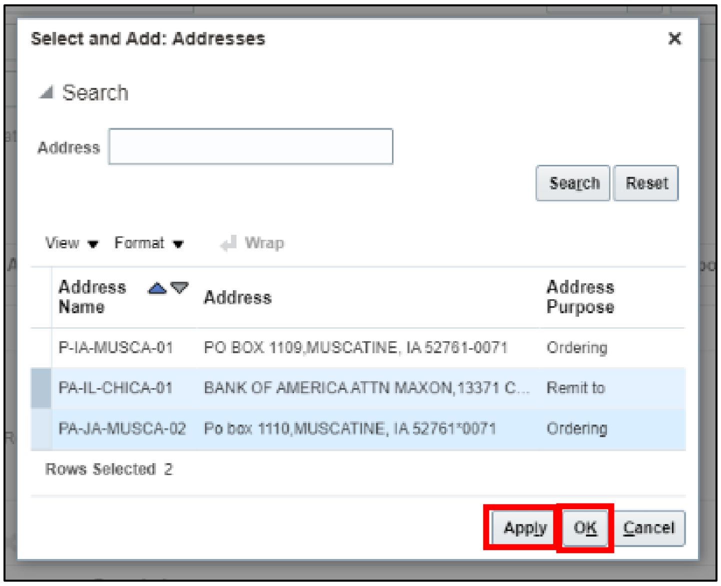
9. Click the **Select and Add Button** under Contact Addresses.



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**.



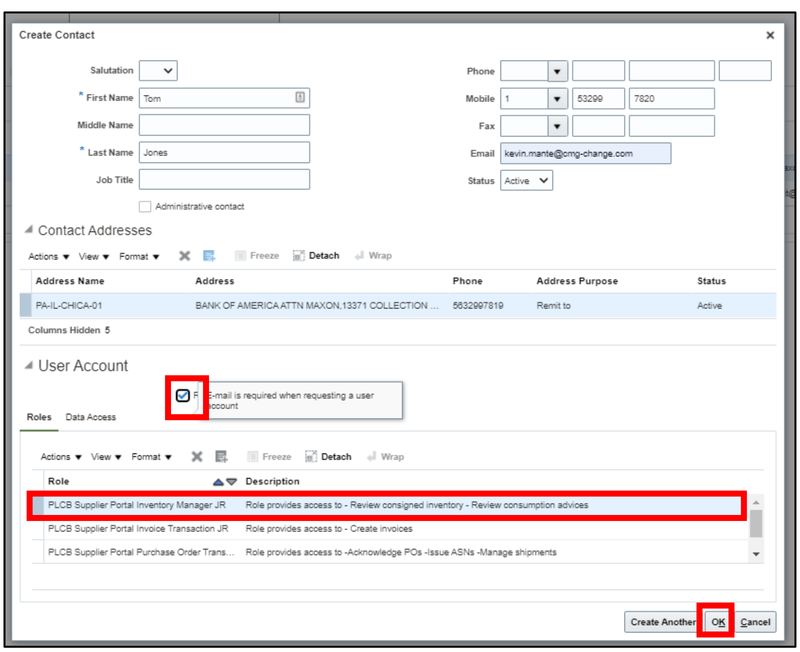
12. Select the **User Account Checkbox** under User Account.

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	• Access Supplier Portal overview • Manage supplier profile	• Create invoices
PLCB Supplier Portal Invoice Transaction JR	• Create invoices	• Acknowledge POs, issue ASNs, manage shipments
PLCB Supplier Portal Purchase Order Transaction JR	• Acknowledge POs • Create ASNs • Upload ASNs • Manage shipments	• Create invoices
PLCB Supplier Portal Bidder JR	• View active negotiations • Manage responses	• Acknowledge POs, issue ASNs, manage shipments
PLCB Supplier Portal Product Administrator JR	• Manage products	• Create invoices • Purchase orders
PLCB Supplier Portal Inventory Manager JR	• Review consumption advices	• Create invoices

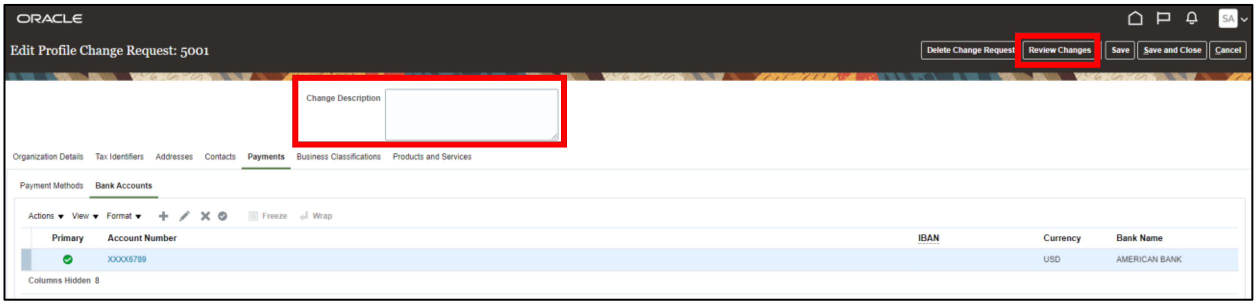
14. Click **OK**.



15. Verify that the user was successfully added.

16. Enter [change description] in the <u>Change Description Field</u>.

17. Click **Review Changes**.

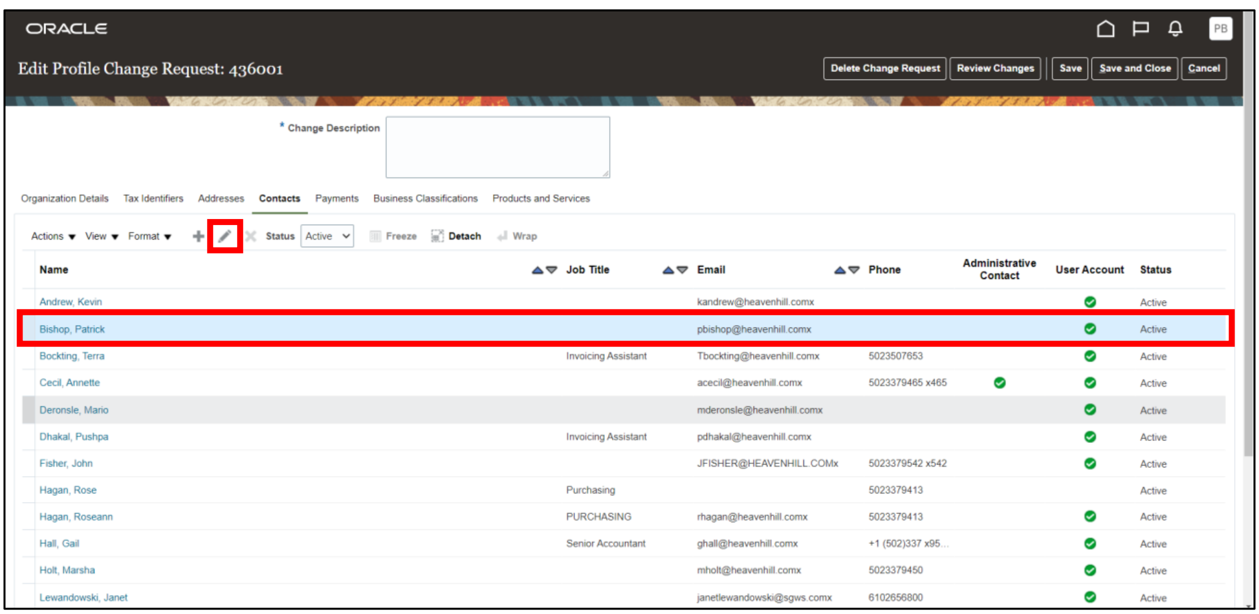


18. Click **Submit**.

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.

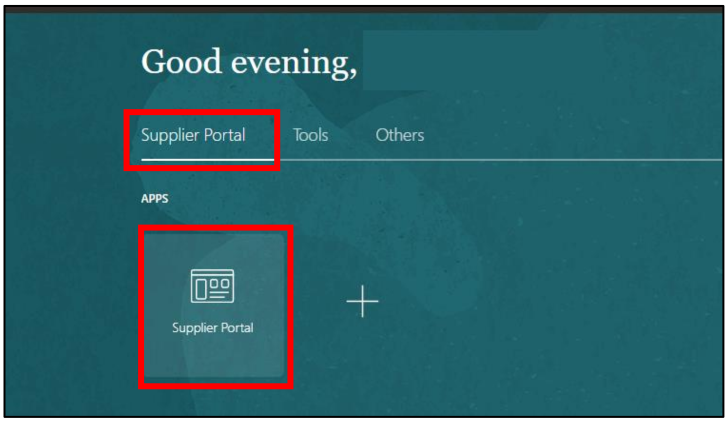
To edit an existing contact, users will need to select the contact line and click the **Pencil Icon**.



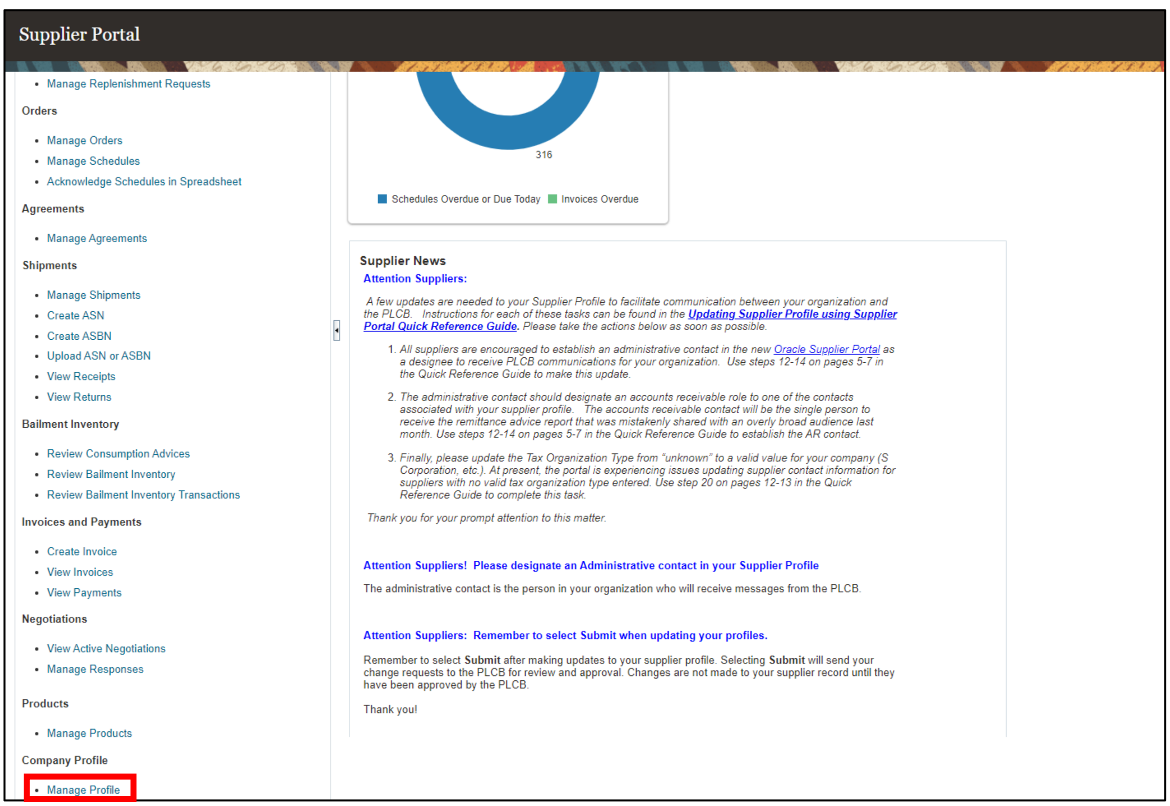
Track a Change Request

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.