
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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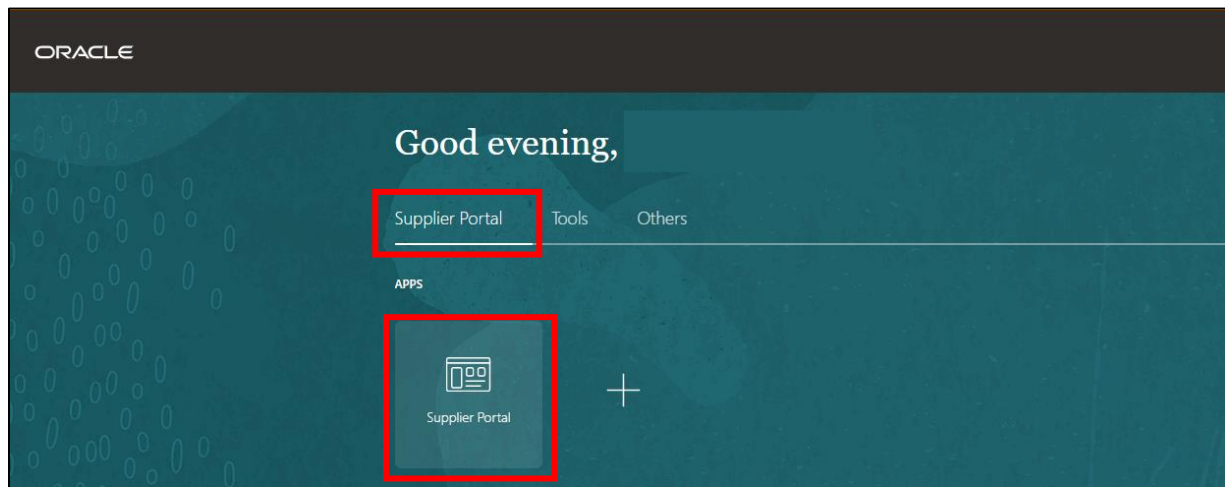
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Supplier – Manage Supplier Data in Oracle Supplier Portal

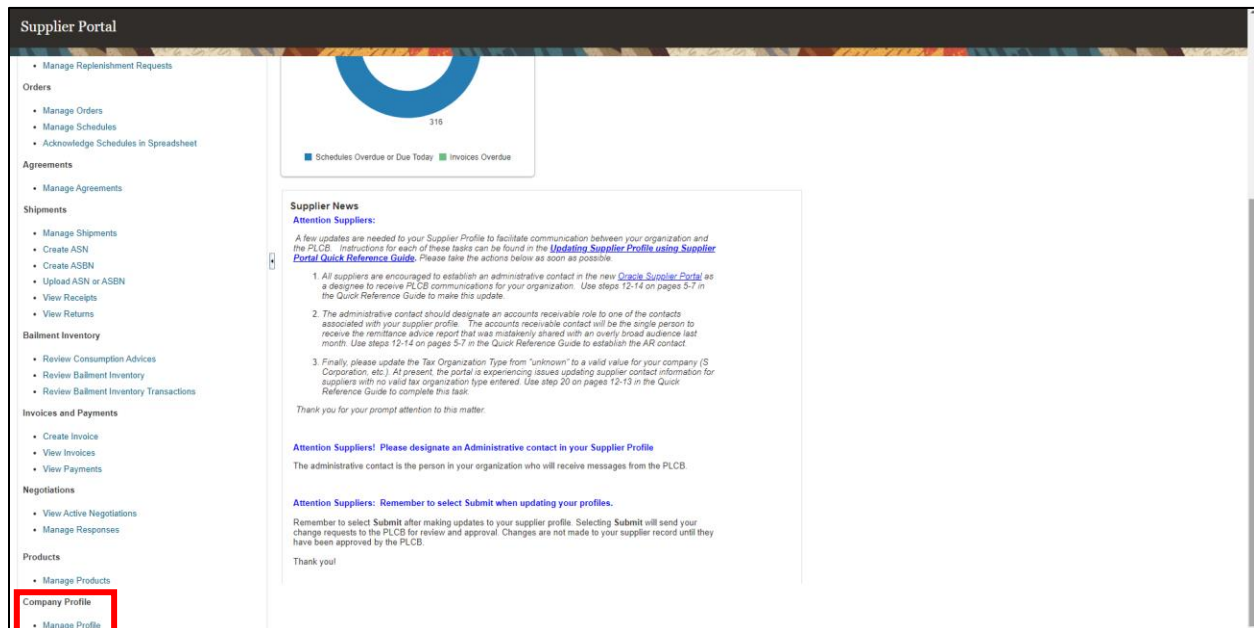
Link to eLearning video: [Supplier - Update Supplier Profile Using Supplier Portal](#)

Update Bank Information

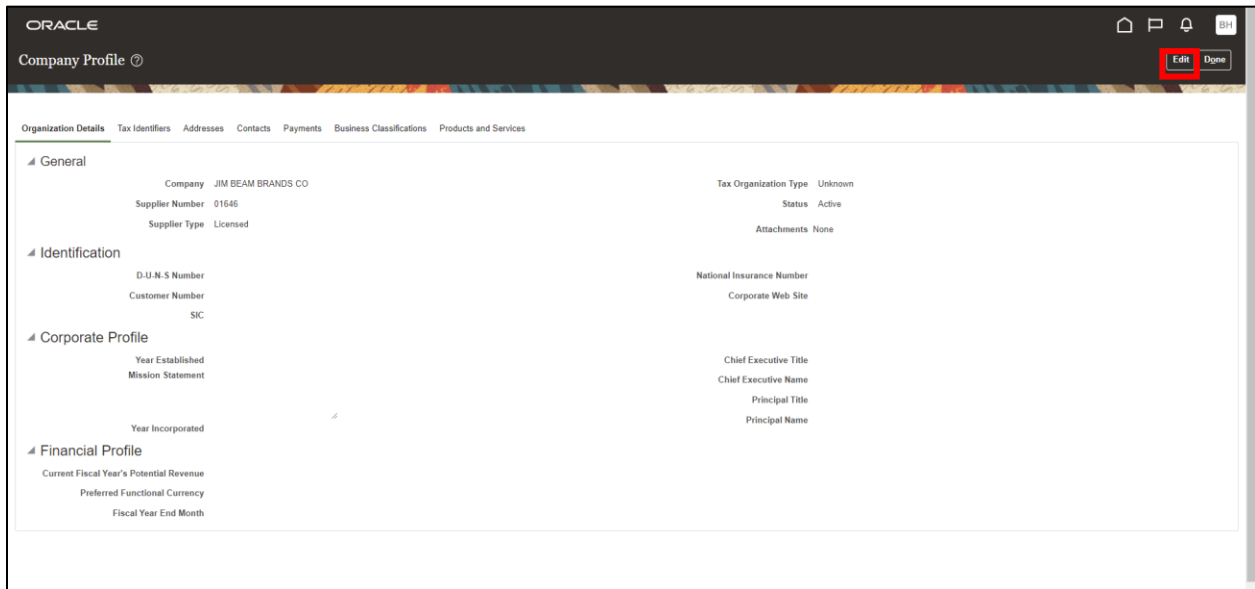
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

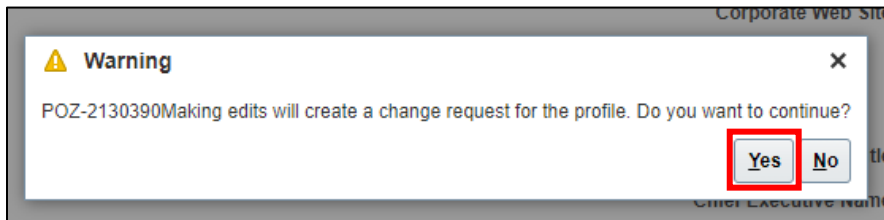


4. Click **Edit** in the top right corner.



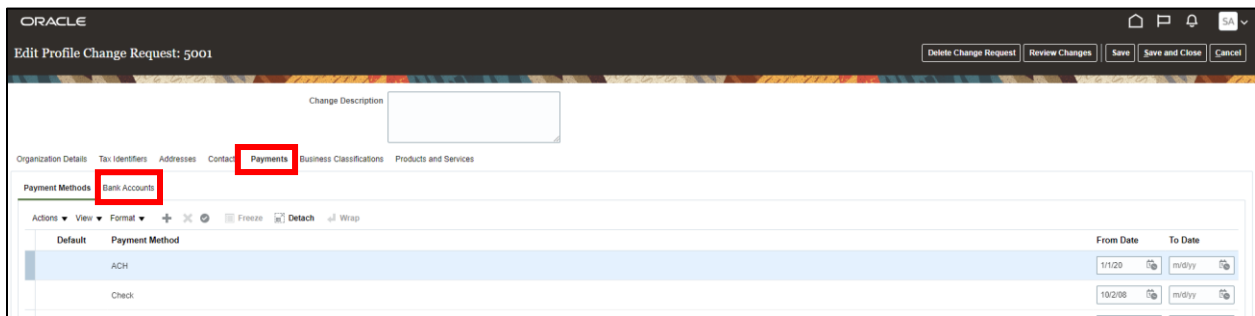
A warning window will appear.

5. Click **Yes** to continue.

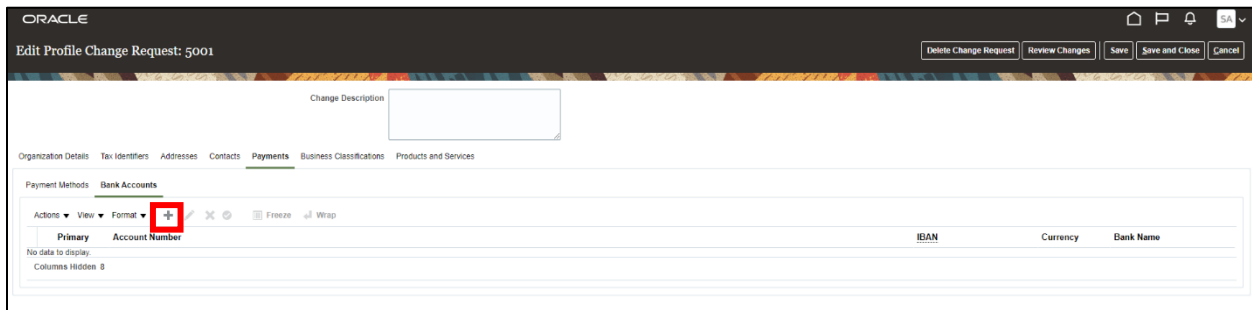


The Edit Profile Change Request Screen will appear.

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
<u>Country</u> *	Dropdown	User	Select the country of the bank account.
<u>Account Number</u> *	Number	User	Enter the bank account number.
<u>Bank Name</u> *	Dropdown	User	Select the name of the bank.
<u>Bank Branch</u> *	Dropdown	User	Select the branch of the bank.
<u>IBAN</u>	Number	User	Enter the IBAN. This field is optional.
<u>Currency</u>	Dropdown	User	Select USD.
<u>Account Type</u>	Dropdown	User	Select the applicable option.
<u>Description</u>	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.

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

Create Bank Account
Enter account number or IBAN unless account number is marked as required.

* Country: United States
* Account Number: 183694021
* Bank Name: CITIBANK NA
* Bank Branch: CITIBANK NA - 021272855
 Allow international payments

From Date: 8/4/22
Inactive On: m/d/yy
IBAN:
Currency: USD

Additional Information
Account Name:
Alternate Account Name:
Account Suffix:
Check Digits:
* Account Type: Checking
* Description: Test account

Create Another **OK** Cancel

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

- 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

Payment Methods **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
	XXXX8392		USD	CITIBANK NA
✓	XXX4177			WILSON & MUIR BANK

Columns Hidden: 8

12. Click **Submit**.

Change Description: New bank account information added.

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
P-KY-BARDS-01	DBA HEAVEN HILL BRANDS, PO BOX 729, BARDSTOWN, KY 40004-0729	+1 (502) 348-3921	Ordering	+1 (502) 348-0162	Active	

Columns Hidden 3

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Bishop, Patrick		pbishop@heavenhill.com			✓	Active	

Columns Hidden 7

Bank Accounts

Primary	Account Number	IBAN	Currency	Bank Name	Details
+	X00X8392		USD	CITIBANK NA	

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

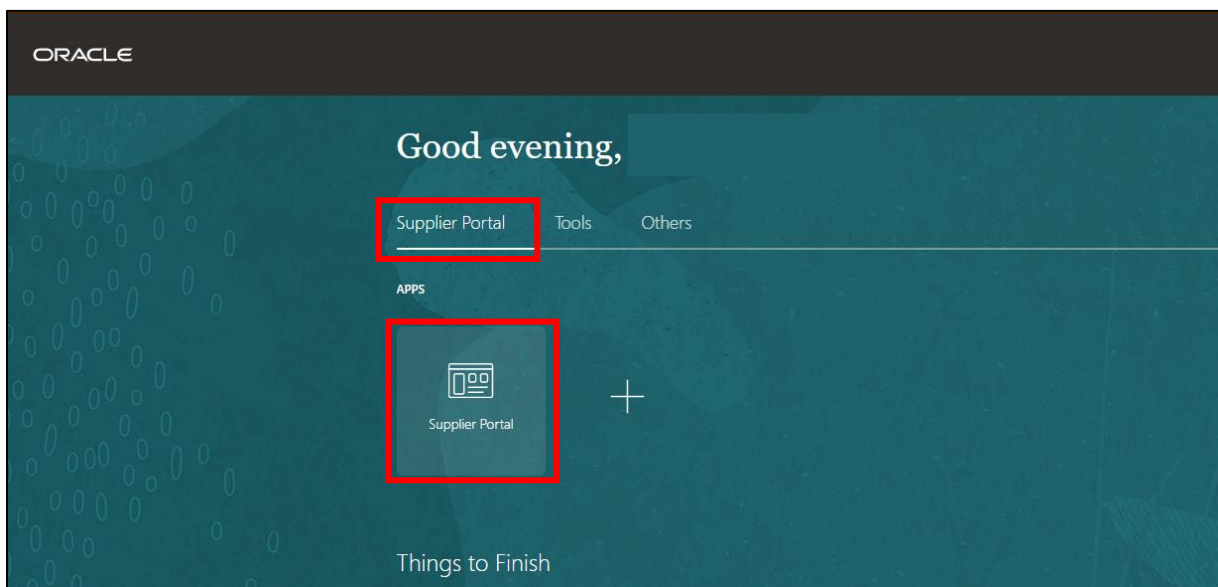
Note: The change request will go through an approval process. To learn how to track the status of a change request, review the [Track a Change Request](#) section below.

Update Tax Information

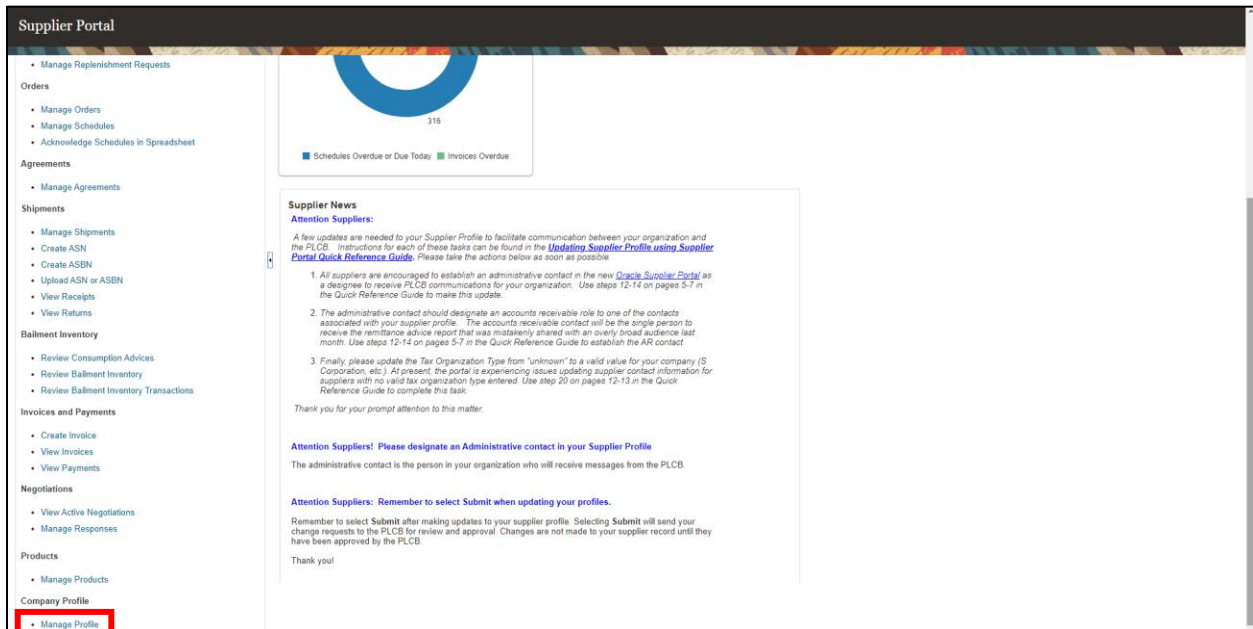
Suppliers are to make and submit changes to the tax information online via the Oracle Supplier Portal.

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

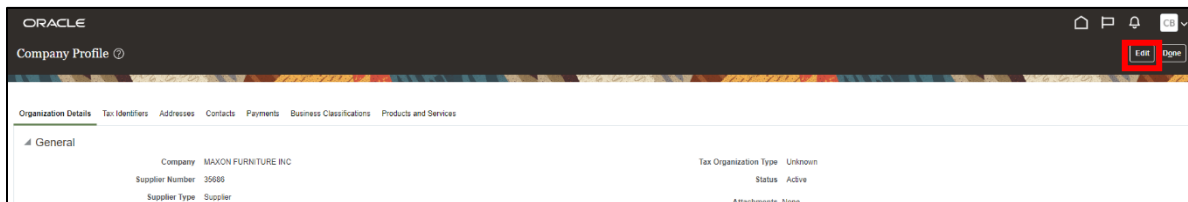
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

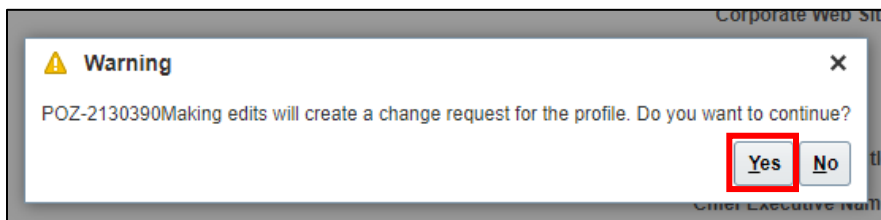


4. Click **Edit** in the top-right corner.



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 Tax Country under the Transaction Tax Section.

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**.

11. Click **Submit**.

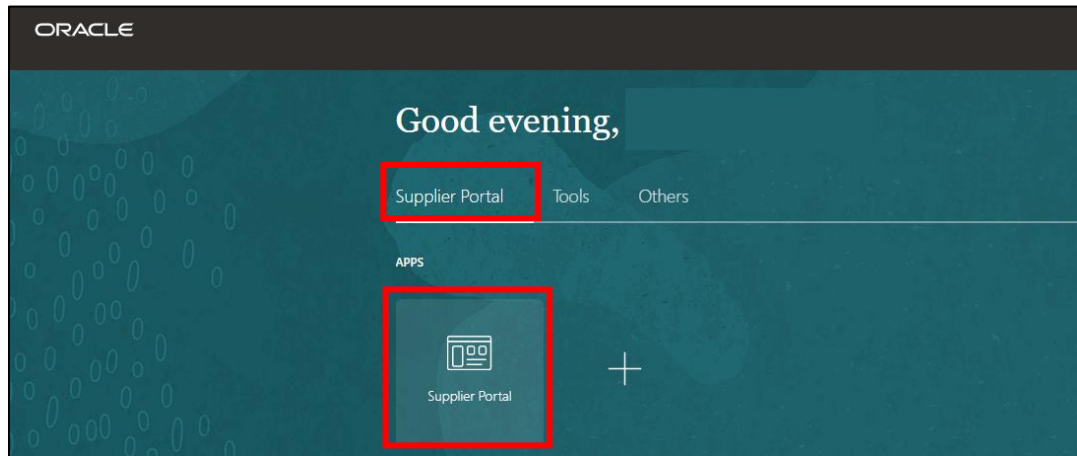
A confirmation pop-up will appear indicating that a change request has been created.

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.

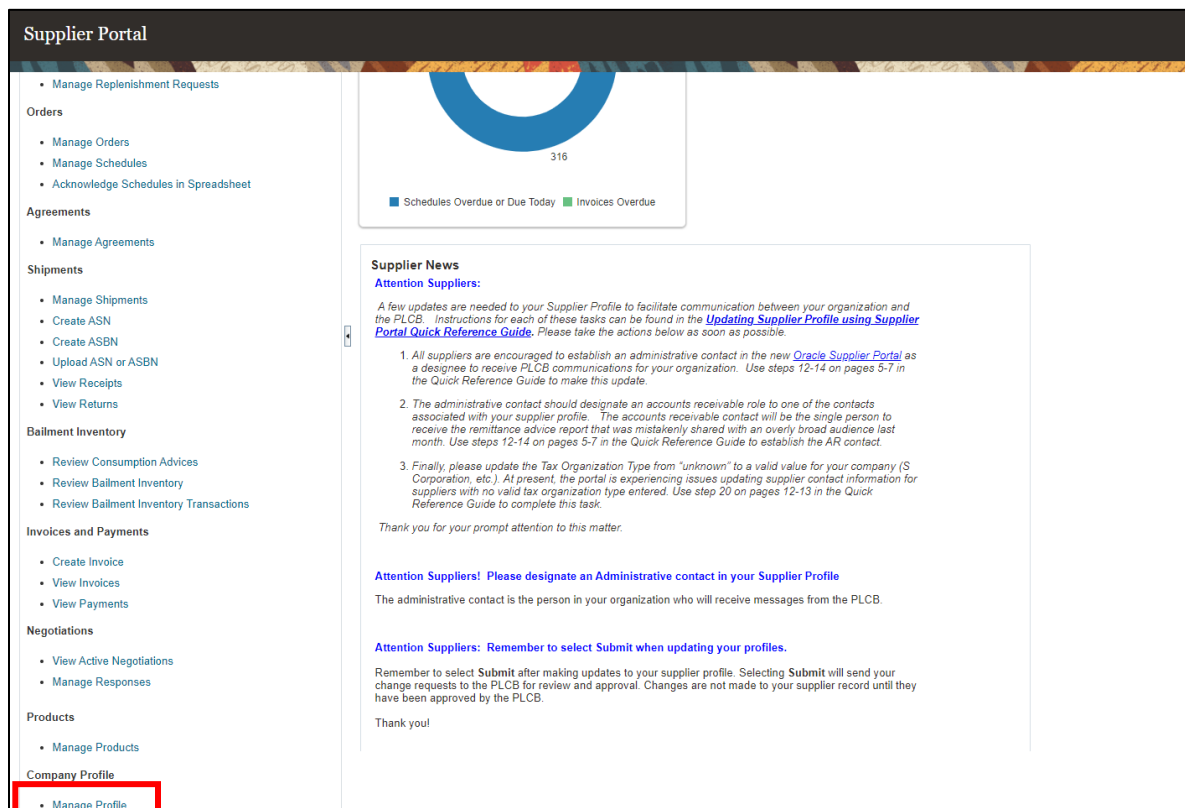
Update Address Information

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

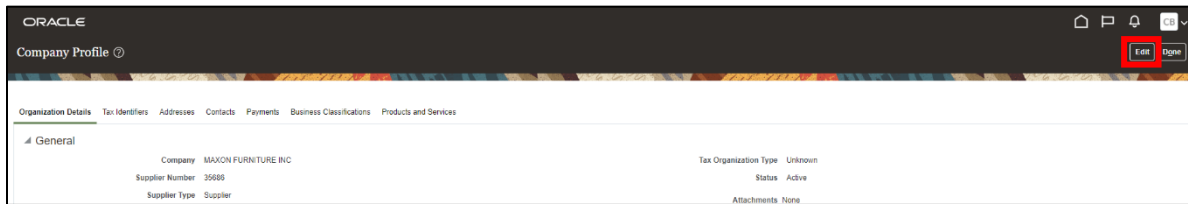
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

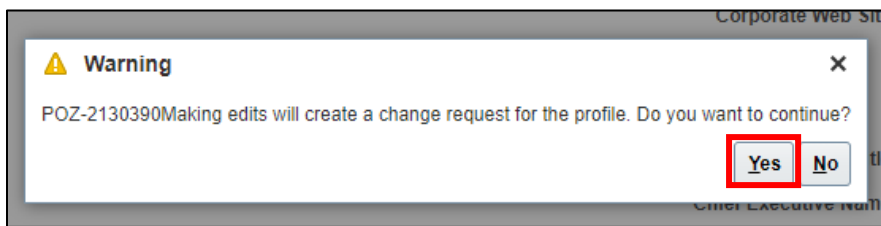


4. Click **Edit** on the top-right corner.



A warning window will appear.

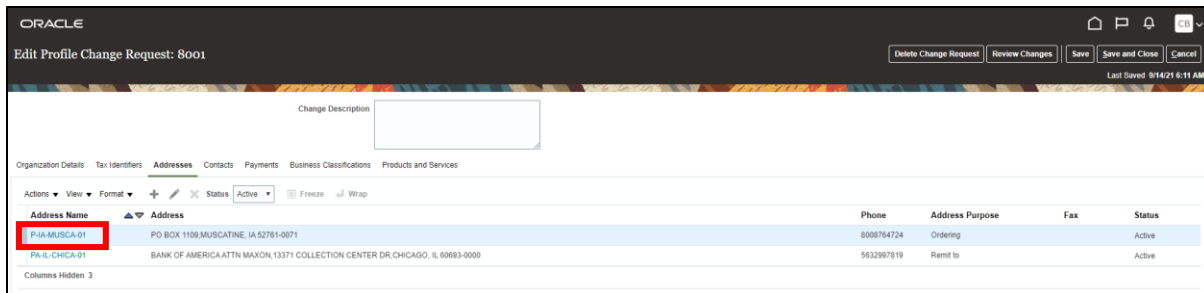
5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

6. Click the **Addresses Tab**.

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



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 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**.

Change Description New Remit To address added.

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
P-KY-BARDS-01	DBA HEAVEN HILL BRANDS,PO BOX 729,BARDSTOWN, KY 40004-0729	+1 (502) 348-3921	Ordering	+1 (502) 348-0162	Active	

Columns Hidden 3

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Bishop, Patrick		pbishop@heavenhill.com			✓	Active	

Columns Hidden 7

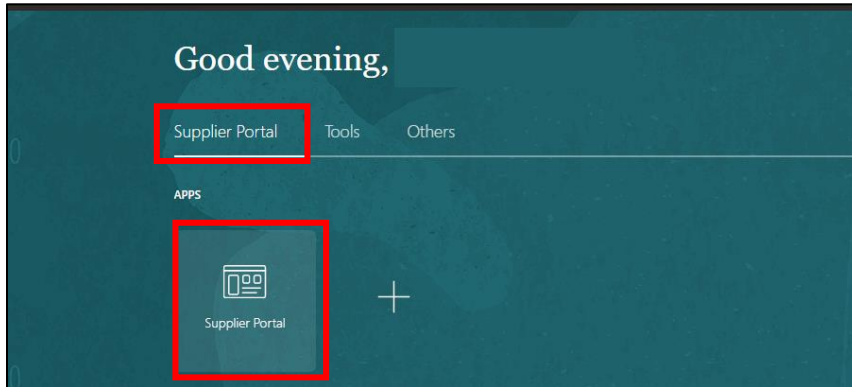
A confirmation pop-up will appear indicating that a change request has been created.

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

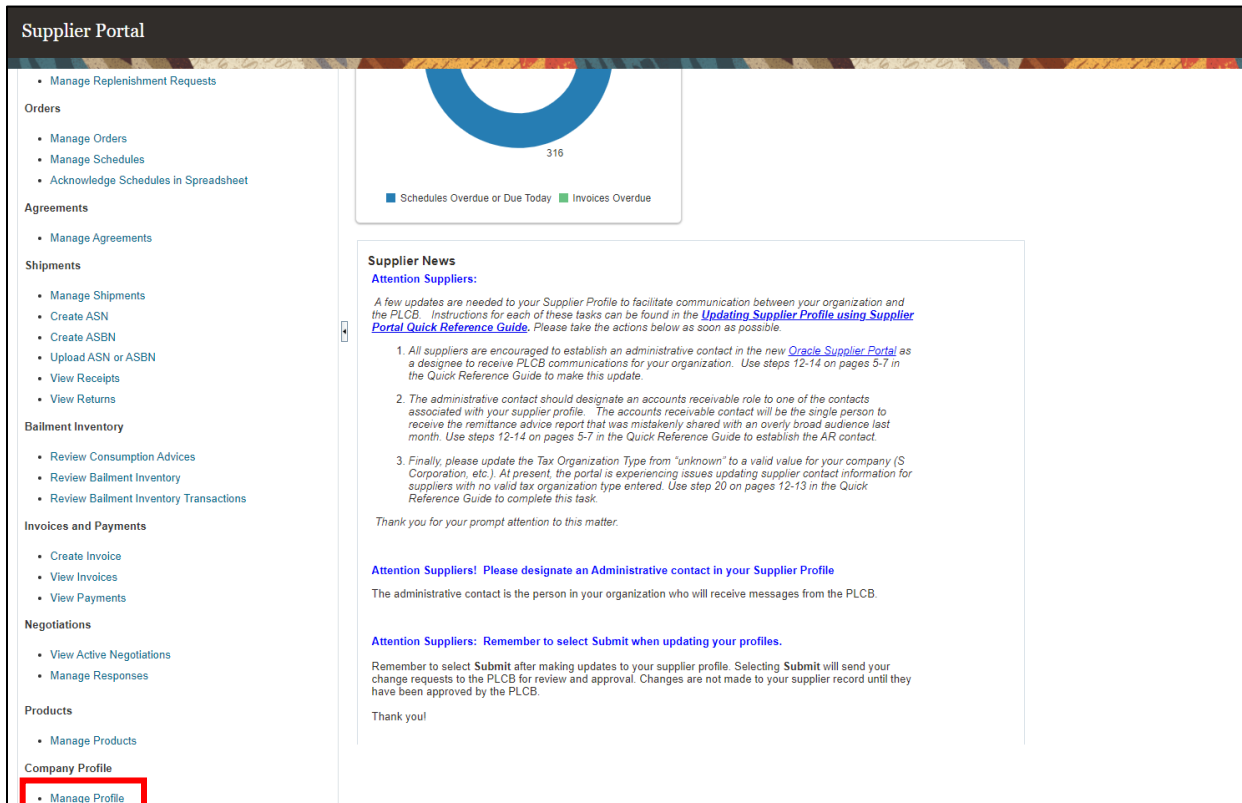
Add a New Address

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

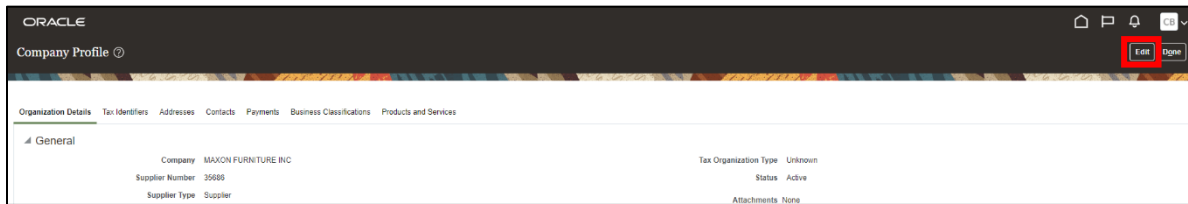
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

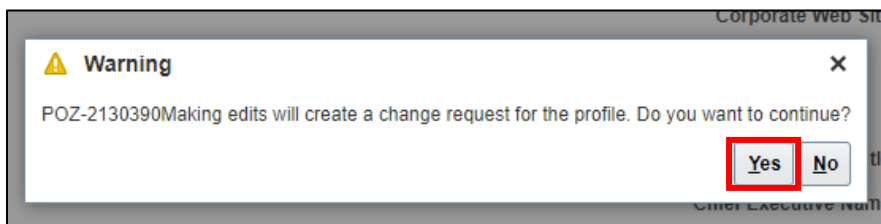


4. Click **Edit** on the top-right corner.



A warning window will appear.

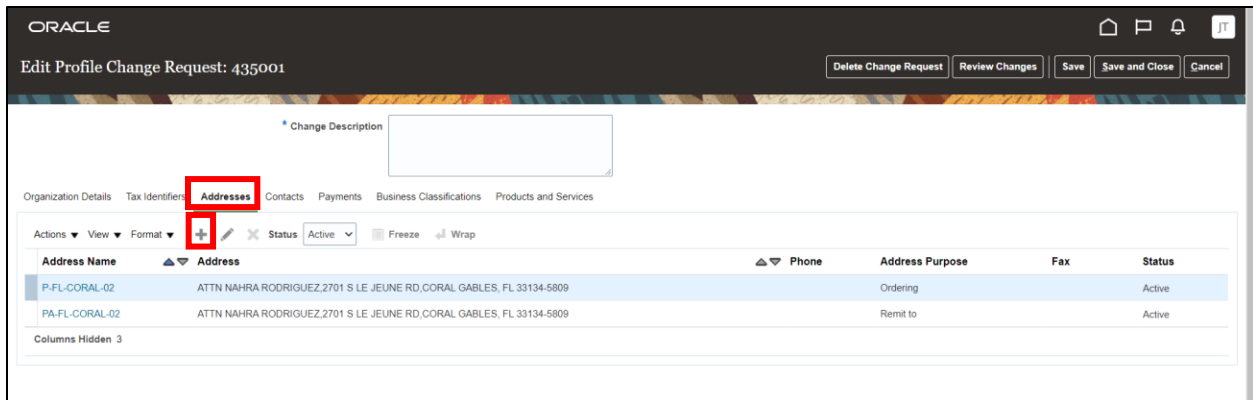
5. Click **Yes** to continue.



The Edit Profile Change Request Screen 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
<u>Address Name</u> *	Text	User	Enter the name of this address.
<u>Country</u> *	Dropdown	User	Enter the country.
<u>Address 1</u>	Text	User	Enter the first line of the address.
<u>Address 2</u>	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.
<u>Postal Code</u>	Number	User	Enter the postal code.
<u>Address Purpose</u> *	Checkbox	User	Select the purpose of the address: Ordering, Remit to, and/or Request For Quotation (RFQ) or Bidding.
<u>Phone</u>	Number	User	Enter the phone number, if any, associated with the address.
<u>Fax</u>	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.

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**.

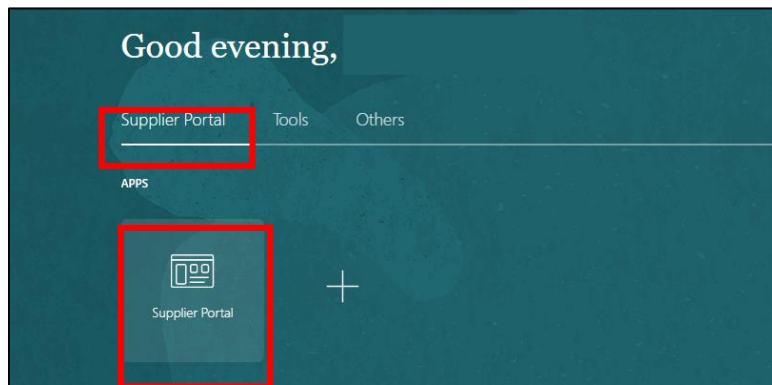
A confirmation pop-up will appear indicating that a change request has been created.

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

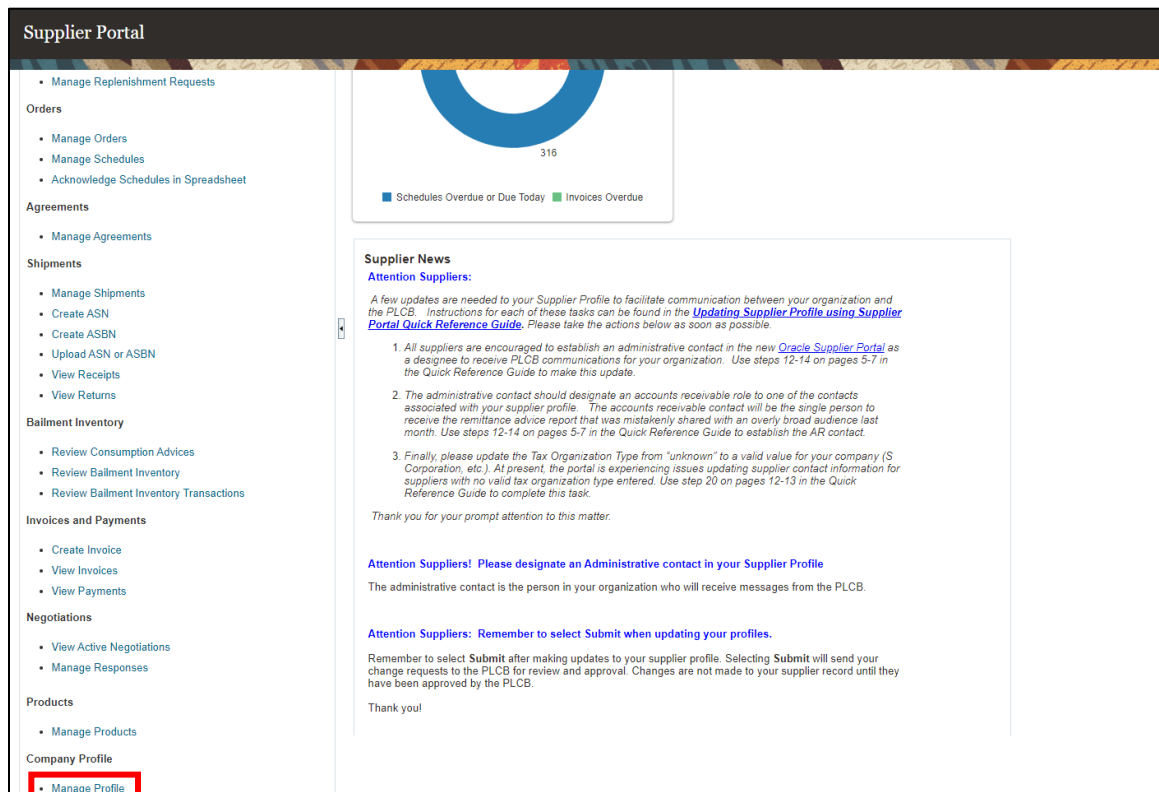
Creation of a New Supplier Contact

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

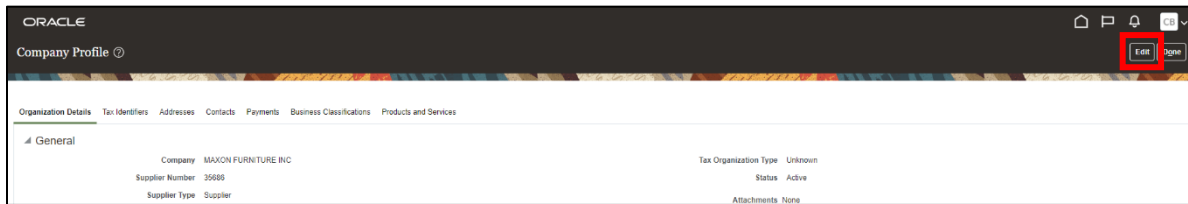
1. Navigate to the Welcome Springboard.
2. Click **Supplier Portal Tab**, then click the **Supplier Portal Tile**.



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

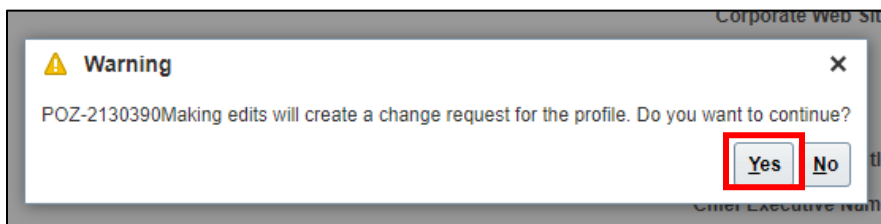


4. Click the **Edit Button** on the top-right corner.



A warning window will appear.

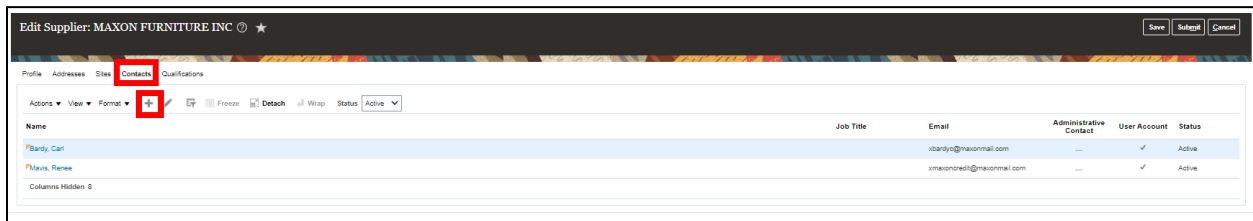
5. Click **Yes** to continue.



The Edit Profile Change Request Screen will appear.

6. Click the **Contacts Tab**.

7. Click the **Add (+) Icon** to add a new contact.



The Create Contact Screen will appear.

8. Enter the required contact information:

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

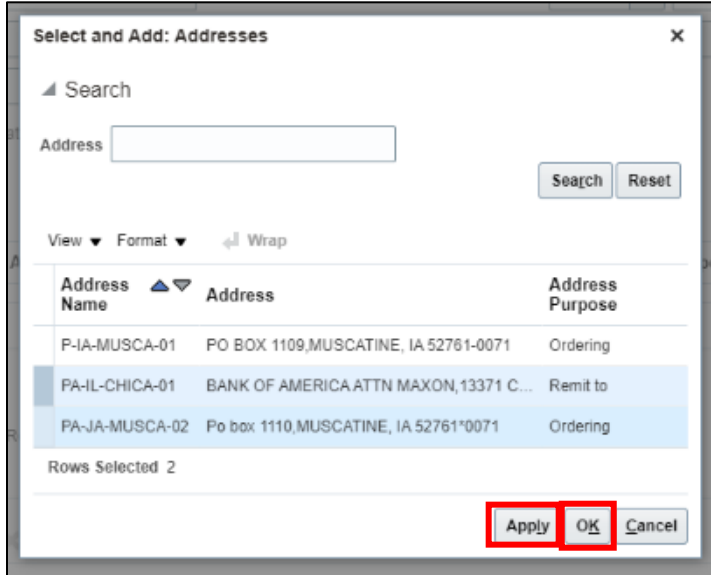
Note: Mandatory fields are denoted by an asterisk (*).

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**.



Select and Add: Addresses

Search

Address

Search Reset

View Format Wrap

Address Name	Address	Address Purpose
P-IA-MUSCA-01	PO BOX 1109,MUSCATINE, IA 52761-0071	Ordering
PA-IL-CHICA-01	BANK OF AMERICA.ATTN MAXON,13371 C...	Remit to
PA-JA-MUSCA-02	Po box 1110,MUSCATINE, IA 52761*0071	Ordering

Rows Selected 2

Apply OK Cancel

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:

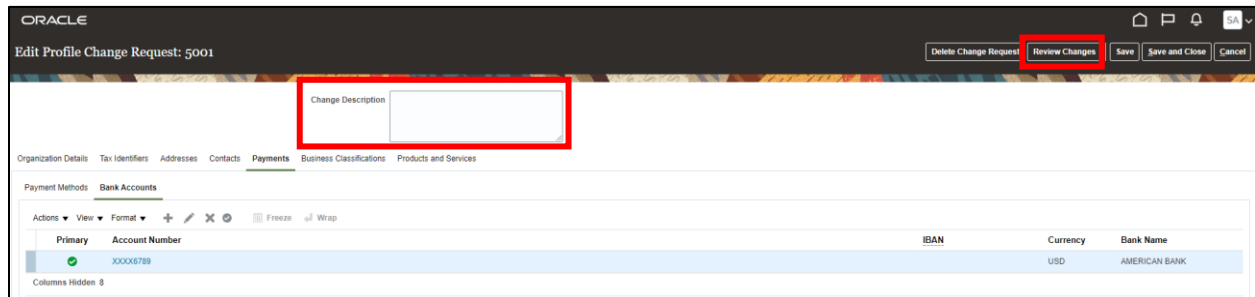
Role Title	Has access to	Does NOT have access to
PLCB Supplier Portal Self-Service JR	<ul style="list-style-type: none"> Access Supplier Portal overview Manage supplier profile 	<ul style="list-style-type: none"> Create invoices
PLCB Supplier Portal Invoice Transaction JR	<ul style="list-style-type: none"> Create invoices 	<ul style="list-style-type: none"> Acknowledge POs, issue ASNs, manage shipments
PLCB Supplier Portal Purchase Order Transaction JR	<ul style="list-style-type: none"> Acknowledge POs Create ASNs Upload ASNs Manage shipments 	<ul style="list-style-type: none"> Create invoices
PLCB Supplier Portal Bidder JR	<ul style="list-style-type: none"> View active negotiations Manage responses 	<ul style="list-style-type: none"> Acknowledge POs, issue ASNs, manage shipments
PLCB Supplier Portal Product Administrator JR	<ul style="list-style-type: none"> Manage products 	<ul style="list-style-type: none"> Create invoices Purchase orders
PLCB Supplier Portal Inventory Manager JR	<ul style="list-style-type: none"> Review consumption advices 	<ul style="list-style-type: none"> Create invoices

14. Click **OK**.

15. Verify that the user was successfully added.

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

17. Click **Review Changes**.

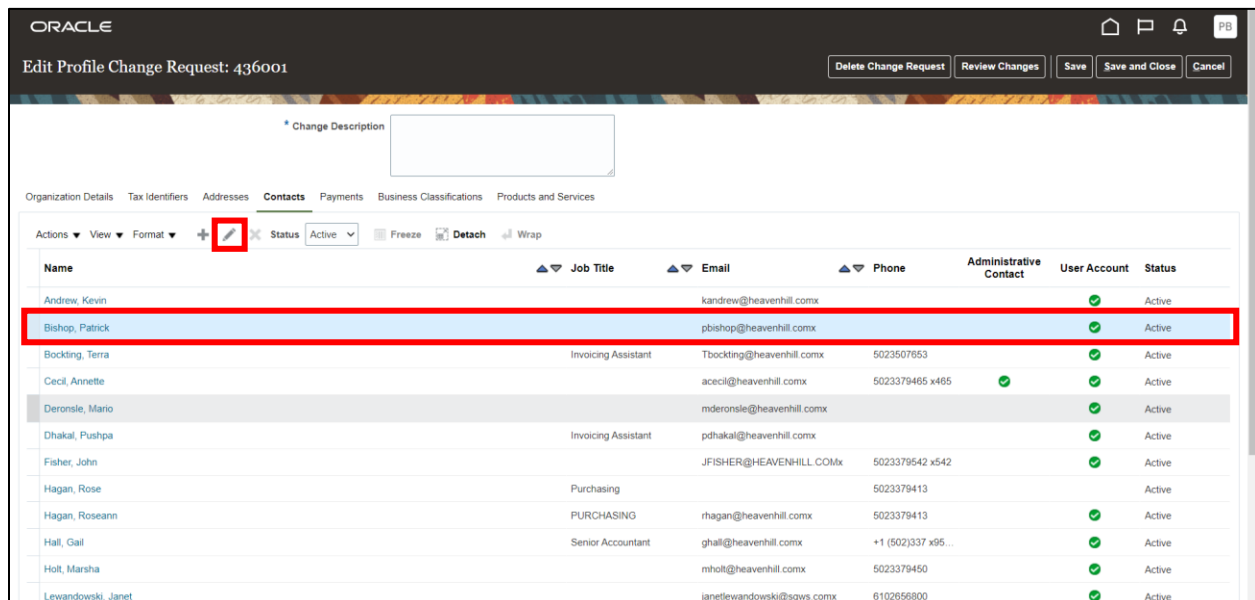


18. Click **Submit**.

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.

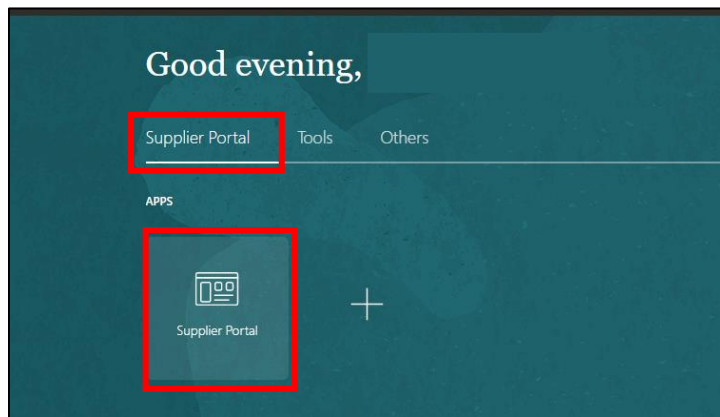
To edit an existing contact, users will need to select the contact line and click the **Pencil Icon**.



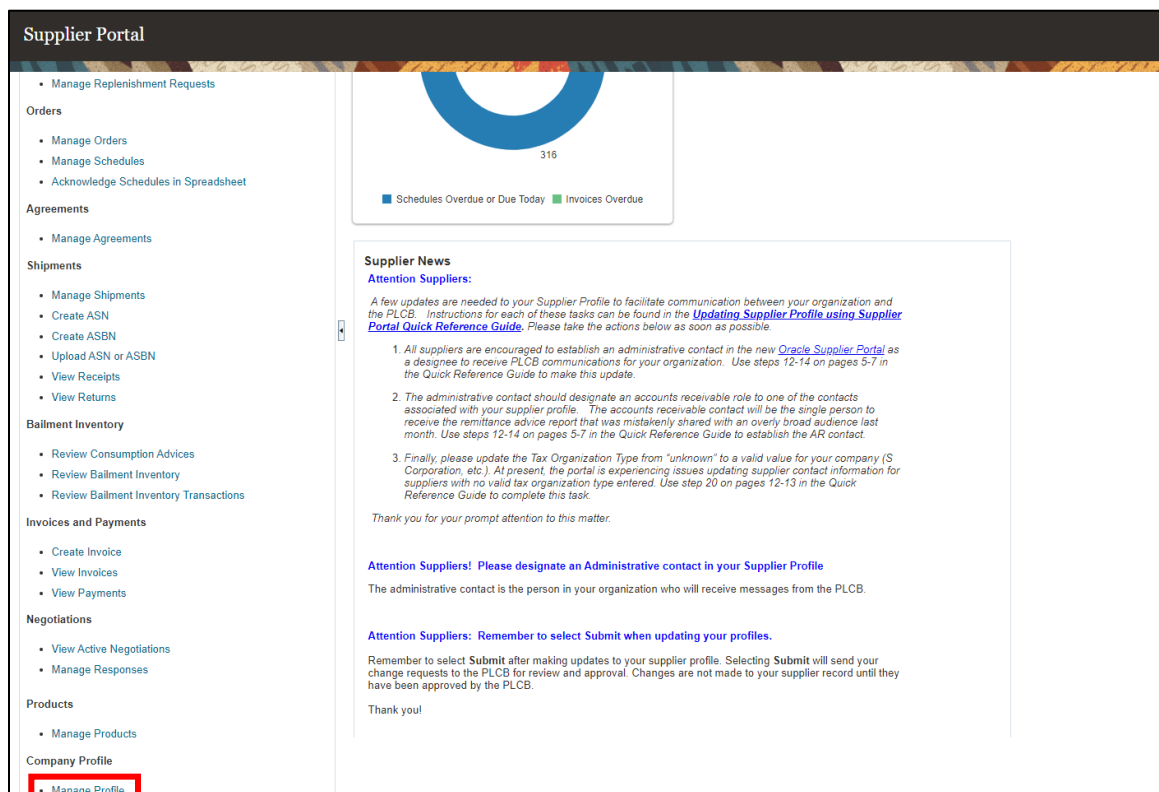
Track a Change Request

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 Request Status Field 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.

The screenshot shows the Oracle Supplier Portal interface for a 'Company Profile'. At the top, there is a notification: 'There is a profile change request pending approval. You may edit to make additional changes.' Below this, the 'Last Change Request' section shows '444001' with a 'Request Status' of 'Pending Approval', which is highlighted with a red box. The 'Requested By' is 'Hagan, Brenda' and the 'Request Date' is '10/3/22'. The 'Change Description' is 'added a new contact'. Below this, there are tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Contacts' tab is active, showing a table of contacts with columns for Name, Job Title, Email, Phone, Administrative Contact, User Account, and Status. The table lists several contacts, including Lexie Iles, who is highlighted in grey.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Credit And Collections, Gbs		GBS_CreditandCollections@beam...			✓	Active
Culver, Megan	Financial Analyst - KY Pla...	Megan.Culver@BeamSuntory.comx	5022152506		✓	Active
Customer Solutions, Supply Chain		andrea.chavez@beamsuntory.comx			✓	Active
Dhakal, Pushpa	Credit and Collections An...	Pushpa.Dhakal@beamsuntory.comx			✓	Active
Faller, David	Director Logistics - Ameri...	david.faller@beanglobal.comx	5022152373		✓	Active
Gholson, Logan	Inventory Accounting Ana...	logan.gholson@beamsuntory.comx	5022152235		✓	Active
Hagan, Brenda	Billing Analyst	Brenda.Hagan@beamsuntory.comx			✓	Active
Iles, Lexie		Lexie.Iles@beamsuntory.com			✓	Active
Jarboe, Amy	Credit Temp	amy.jarboe.accountemps@beams...			✓	Active
Johnson, Leslie	Inventory Replen CoOrd	leslie.johnson@beamsuntory.comx	5028558447		✓	Active
Lankford, Josh	Sr Credit Analyst	josh.lankford@beamsuntory.comx			✓	Active