



## Edit Supplier Information

### Source to Pay Quick Reference Guide (QRG)

#### Purpose

This Quick Reference Guide (QRG) provides step-by-step instructions and process considerations to edit supplier information.

#### Role(s)

This Quick Reference Guide is useful for the following Role:

- Supplier

#### Table of Contents

Purpose .....	1
Role(s).....	1
Table of Contents .....	1
Step-by-Step Instructions:.....	2
o Edit Supplier Information .....	2



Step-by-Step Instructions:

**Edit Supplier Information**

1. Click on **Supplier Portal**.





- From the Supplier Portal homepage, click **Manage Profile**.

**ORACLE**

## Supplier Portal

Search Orders

### Tasks

- Orders
  - Manage Orders
  - Manage Schedules
  - Acknowledge Schedules in Spreadsheet
- Agreements
  - Manage Agreements
- Contracts and Deliverables
  - Manage Contracts
  - Manage Deliverables
- Consigned Inventory
  - Review Consumption Advices
- Invoices and Payments
  - Create Invoice
  - Create Invoice Without PO
  - View Invoices
  - View Payments
- Negotiations
  - View Active Negotiations
  - Manage Responses
- Qualifications
  - Manage Questionnaires
  - View Qualifications
- Company Profile
  - Manage Profile**

### Requiring Attention

1

1

Invoices Overdue

### Supplier News

Welcome to the Supplier Portal



3. Click **Edit**.

Company Profile ⓘ Edit Done

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Company	AAPC	Tax Organization Type	Corporation
Supplier Number	46	Status	Active
Supplier Type	REGULAR	Attachments	None

Identification

D-U-N-S Number	National Insurance Number
Customer Number	Corporate Web Site
SIC	

4. Click **Yes** for the Warning message.

Status Active

**Warning** ×

POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?

Yes No

Corporate Web Site

5. Click the appropriate tab - **Organizational Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, Products and Services** to make changes.

Edit Profile Change Request: 15001

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

\* Supplier Name

Supplier Number 46

Supplier Type



6. Click the **Organization Details** tab.  
Enter the details to make changes, as required.

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Supplier Name AAPC  
Supplier Number 45  
Supplier Type REGULAR

Tax Organization Type Corporation  
Status Active  
Attachments None

Identification

D-U-N-S Number  
Customer Number  
SIC

National Insurance Number  
Corporate Web Site

Corporate Profile

Year Established  
Mission Statement  
Year Incorporated

Chief Executive Title  
Chief Executive Name  
Principal Title  
Principal Name

Financial Profile

Fiscal Year End Month  
Current Fiscal Year's Potential Revenue  
Preferred Functional Currency

7. Click the **Tax Identifiers** tab.

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Supplier Name AAPC  
Supplier Number 46  
Supplier Type REGULAR

Tax Organization Type Corporation  
Status Active  
Attachments None

8. Enter the details to make changes, as required.

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

Income Tax

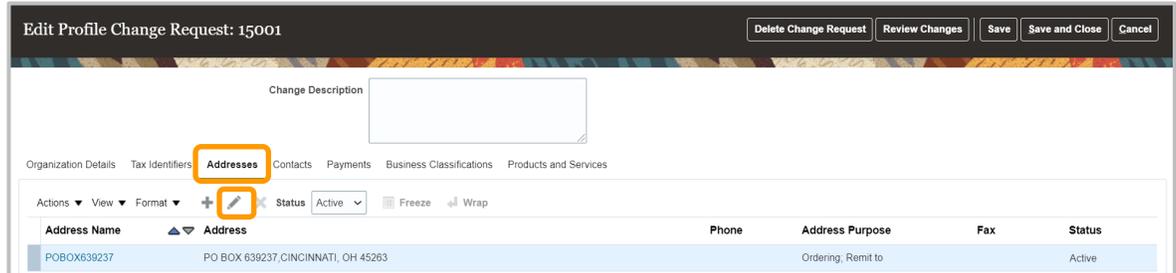
Taxpayer Country United States  
Taxpayer ID 111111155  
Federal reportable  
Federal Income Tax Type  
State reportable

Tax Reporting Name AAPC  
Name Control  
Verification Date m/d/yy  
Use withholding tax  
Withholding Tax Group

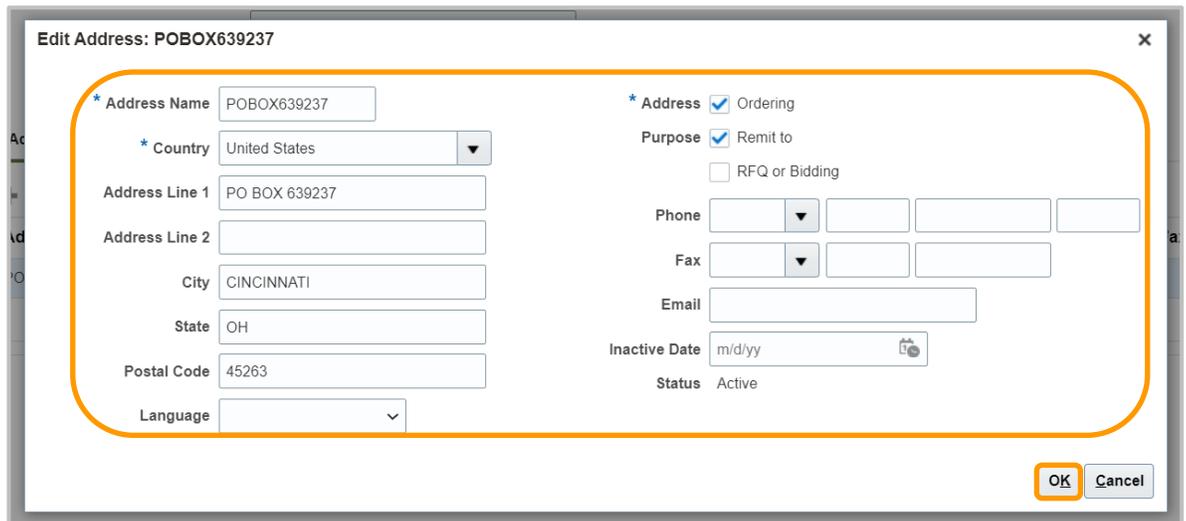
Transaction Tax

Tax Country  
Tax Registration Type

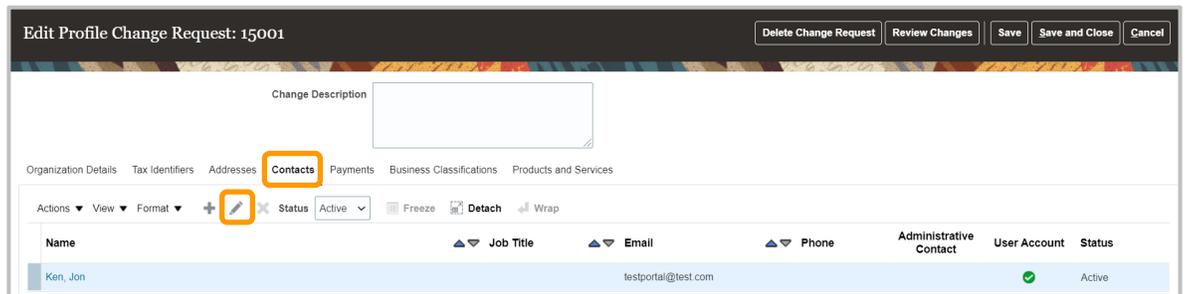
9. Click the **Addresses** tab.  
Click the **Edit pencil** icon.



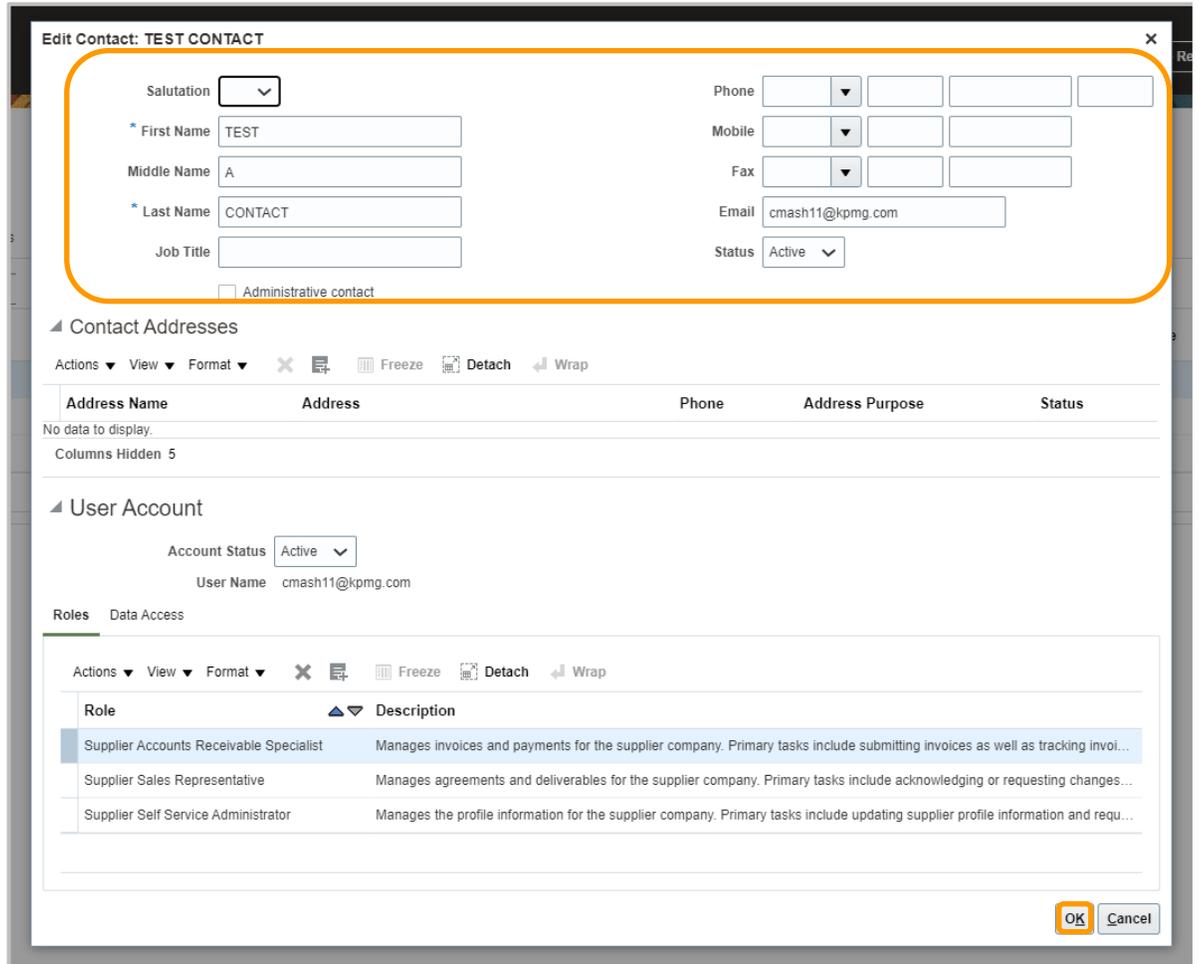
10. Enter the details to make changes, as required. Click **OK**.  
*\*Enter the Supplier address in all caps.*



11. Click the **Contacts** tab.  
Click the **Edit pencil** icon.



- Enter the details to make changes, as required. Click **OK**.



**Edit Contact: TEST CONTACT**

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Phone

Mobile

Fax

Email

Status

Administrative contact

**Contact Addresses**

Actions View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				
Columns Hidden 5				

**User Account**

Account Status

User Name

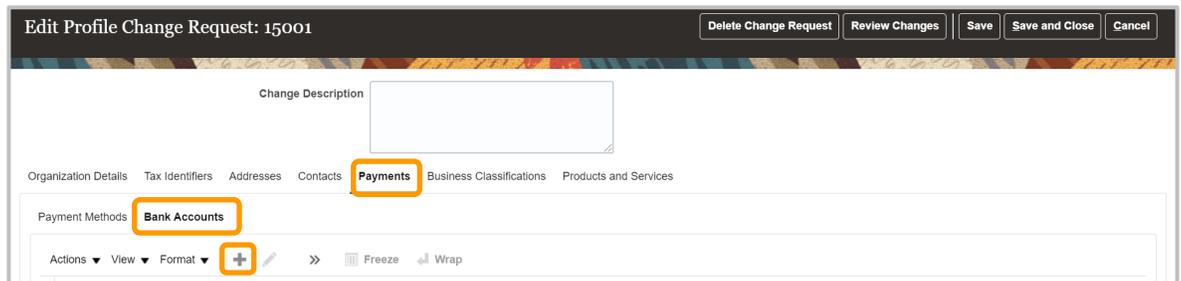
Roles Data Access

Actions View Format Freeze Detach Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invo...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes...
Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...

**OK** Cancel

- Under the **Payments** tab, click the **Bank Accounts** tab. Click the **Create +** icon.



**Edit Profile Change Request: 15001**

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods **Bank Accounts**

Actions View Format **+** Freeze Wrap



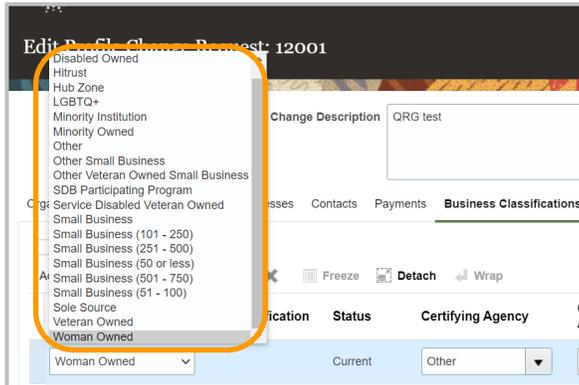
14. Enter the required details.  
Click **OK**.  
Enter the **Country**, **Account Number**, **Bank Name** and **Bank Branch** details.

15. Click the **Business Classifications** tab.  
Click the **Create +** icon.

16. Click the **Classification** drop down.

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments
Woman Owned		Current	Other			9/28/21	10/7/21	None +

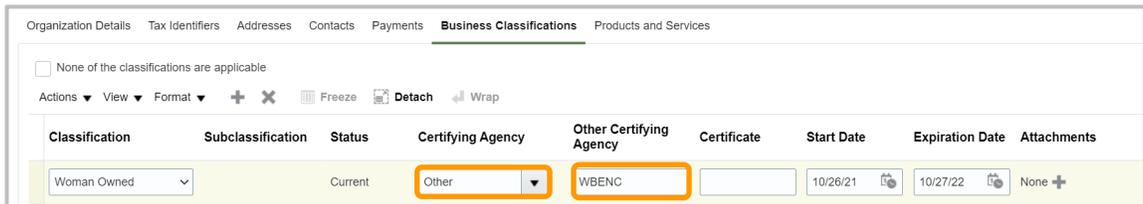
17. Select the appropriate option.



Disabled Owned  
 Hitrust  
 Hub Zone  
 LGBTQ+  
 Minority Institution  
 Minority Owned  
 Other  
 Other Small Business  
 Other Veteran Owned Small Business  
 SDB Participating Program  
 Service Disabled Veteran Owned  
 Small Business  
 Small Business (101 - 250)  
 Small Business (251 - 500)  
 Small Business (50 or less)  
 Small Business (501 - 750)  
 Small Business (51 - 100)  
 Sole Source  
 Veteran Owned  
 Woman Owned

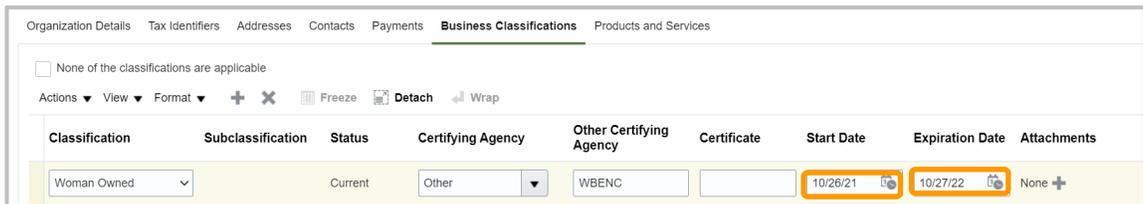
Woman Owned

18. Click the **Certifying Agency** and select the appropriate option. Select **Others** if the option is not in the list.  
 Enter the **Other Certifying Agency** details.



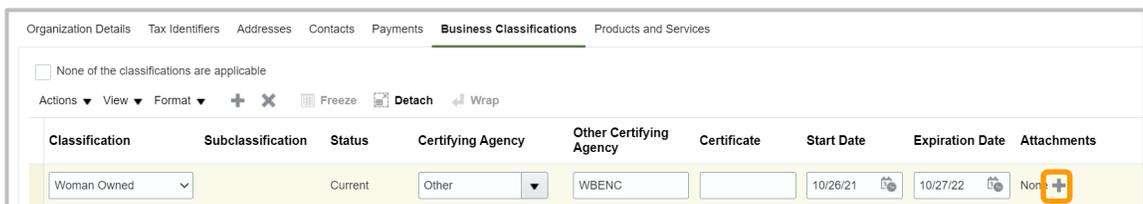
Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments
Woman Owned		Current	Other	WBENC		10/26/21	10/27/22	None +

19. Enter the **Start Date** and **Expiration Date** details.



Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments
Woman Owned		Current	Other	WBENC		10/26/21	10/27/22	None +

20. Click the **Attachments +** icon.



Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments
Woman Owned		Current	Other	WBENC		10/26/21	10/27/22	None +



- 21. Select the appropriate File.  
Click **OK**.

The screenshot shows an 'Attachments' dialog box with a table. The table has columns: Type, File Name or URL, Title, Description, Attached By, and Attached Date. The 'File Name or URL' column contains 'No file chosen' and a 'Choose File' button is highlighted with an orange box. The 'Attached By' column contains 'Bright Health Su...' and the 'Attached Date' column contains '10/28/21 9:56'. At the bottom right, 'OK' and 'Cancel' buttons are visible, with 'OK' highlighted by an orange box.

- 22. Enter the **Change Description** details.  
Click **Review Changes**.

The screenshot shows the 'Edit Profile Change Request: 12001' form. The 'Change Description' field contains the text 'Products and Services updated' and is highlighted with an orange box. At the top right, there are buttons for 'Cancel Change Request', 'Review Changes' (highlighted with an orange box), 'Save', 'Save and Close', and 'Cancel'. At the bottom, there is a navigation menu with 'Products and Services' selected.

- 23. Review the details.  
Click **Submit**.

The screenshot shows the 'Review Changes' dialog box. It contains two tables. The first table is titled 'Addresses' and has columns: Address Name, Address, Phone, Address Purpose, Fax, Status, and Details. It contains one row with 'POBOX639237' as the address name and 'PO BOX 639237,Test,CINCINNATI, OH 45263' as the address. The second table is titled 'Products and Services' and has columns: Category Name and Description. It contains one row with 'Bright\_Root\_Category > Facilities Management' as the category name and 'Facilities Management' as the description. The entire content area is highlighted with an orange box. At the top right, there are buttons for 'Edit', 'Submit' (highlighted with an orange box), and 'Cancel'.