

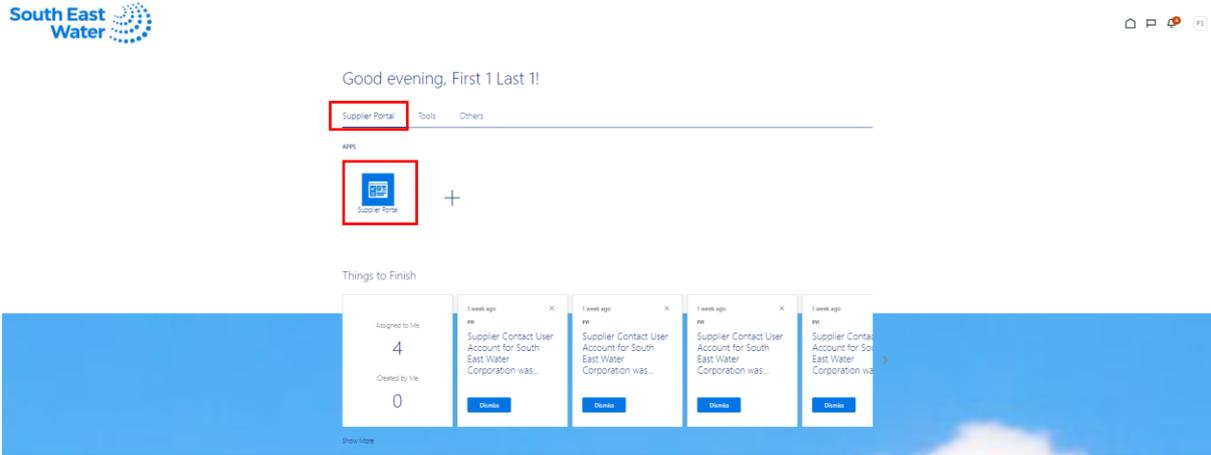
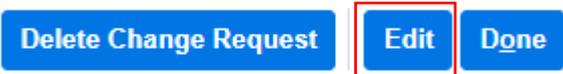
Managing Your Supplier Profile and Contacts

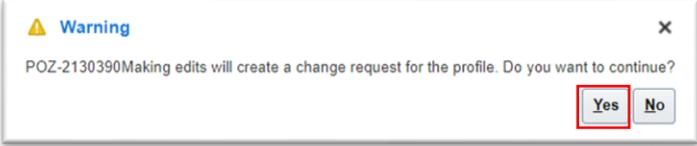
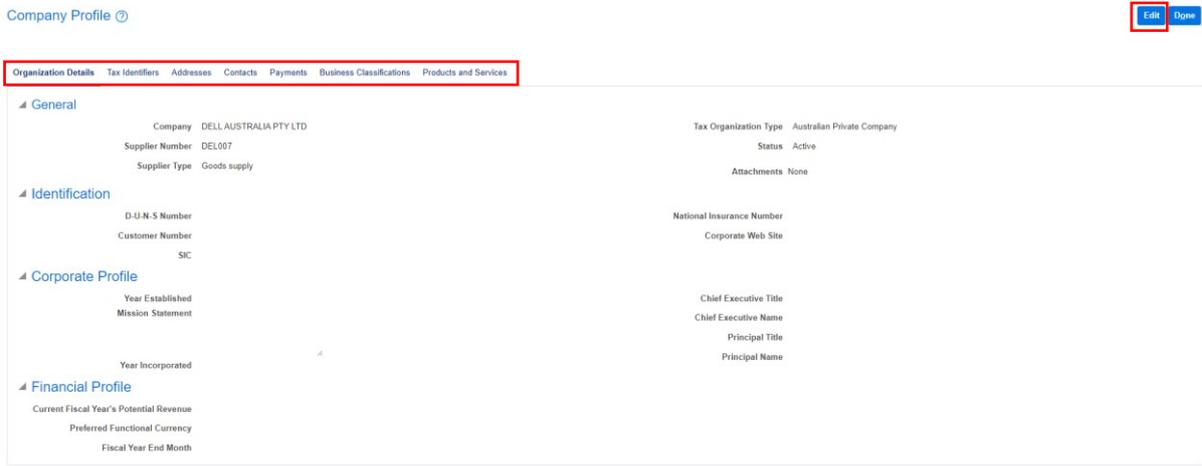
Purpose The purpose of this procedure is to demonstrate how to manage a supplier’s profile including contacts in the Supplier Portal.

Scope Keeping the supplier’s profile information up to date is the supplier’s responsibility. Certain changes made will prompt an approval to South East Water’s Supplier Administration team.

Overview Profile management includes making the necessary changes in a timely manner to the supplier’s organisation details, adding contacts, making a contact inactive and ensuring that a contact is linked to the appropriate address information.

Procedure To manage your supplier profile, complete the following steps.

Step	Action
1	<p>Log in to the Supplier Portal using your User ID and Password. Note: Keep User IDs and passwords confidential to prevent unauthorised access to your respective supplier account.</p> <p>Navigation: Sign in page > ERP home page > Supplier Portal > Supplier Portal.</p> 
2	<p>Navigation: From Tasks > under Company Profile, click Manage Profile.</p> <p>Company Profile</p> <ul style="list-style-type: none"> • Manage Profile
3	<ul style="list-style-type: none"> • Click the Edit button on the upper right-hand corner. 

<p>4</p>	<ul style="list-style-type: none"> Click Yes on the pop-up window if you wish to submit a profile change request. 
<p>5</p>	<ul style="list-style-type: none"> Click the different tabs: Organisation Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, Products and Services. Only select the relevant section you need to add or update details to. Make the necessary changes to your supplier profile details. Include attachments as supporting documents for any relevant changes in the Organisation Details tab > Attachments > click + > OK. Click Save/Save and Close. 
<p>6</p>	<p><u>To add a contact</u></p> <ul style="list-style-type: none"> Click the Edit button. <ul style="list-style-type: none"> Select the Contacts tab. Click the + create symbol (to add) or under the Actions drop-down, select create. Fill out the required contact details: First Name, Last Name, Email Address etc. Tick the 'Administrative contact' box (if applicable). Critical step typically missed: Under Contact Addresses, click Select and Add icon  or via Actions drop-down, click Select and Add to link the contact to an address. Click Apply, then OK. Click OK. Tick 'Request user account' box if the contact needs access to the supplier portal. Under the Roles tab, click the 'select and add' icon  or via Actions drop-down click select and add to assign the contact's role. Highlight the role from the list available. Click Apply, then click OK. Click OK. Alternatively, if you wish to edit a contact, click the pencil icon  to make the amendments. To make a contact inactive, highlight the user's name and use the Status drop-down to select inactive. Click OK.

7	<p> <input type="button" value="Delete Change Request"/> <input type="button" value="Review Changes"/> <input type="button" value="Save"/> <input type="button" value="Save and Close"/> </p> <ul style="list-style-type: none"> Click Review Changes button to review the details.
8	<ul style="list-style-type: none"> Click Submit or Cancel as appropriate. Submit the supplier profile changes for approval by clicking SUBMIT.
9	<p>Upon clicking the SUBMIT button, the user will get a confirmation message along with a Change Request number on the screen.</p>

What happens next?

Once you perform tasks to manage the supplier profile, the following will occur:

- 1) A supplier profile change request will be submitted for approval.
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Revision status

The following table provides a record of changes made to this document, by whom and when.

Date of change	Description of change	Author initials	Approver initials