

# Table of Contents

**Supplier Management & SQM..... 1**

**For Current Suppliers \_ 8.5.19 ..... 1**

        Maintaining Your Supplier Profile..... 1

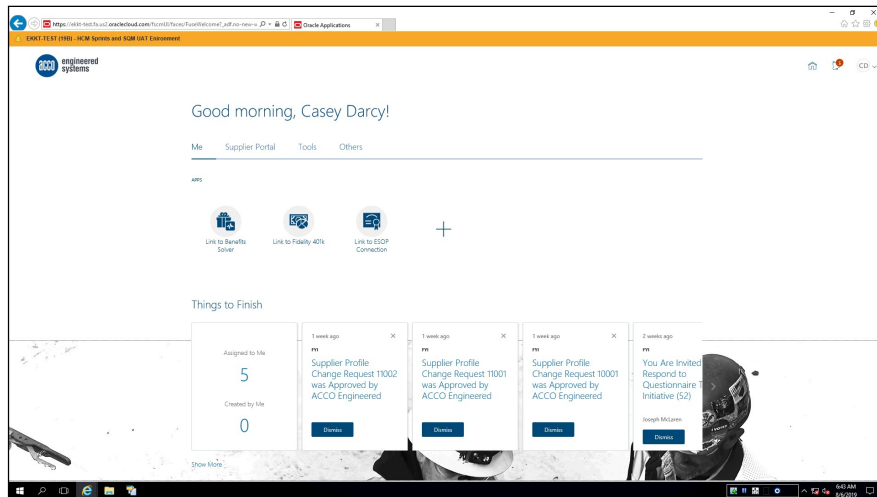
## Supplier Management & SQM

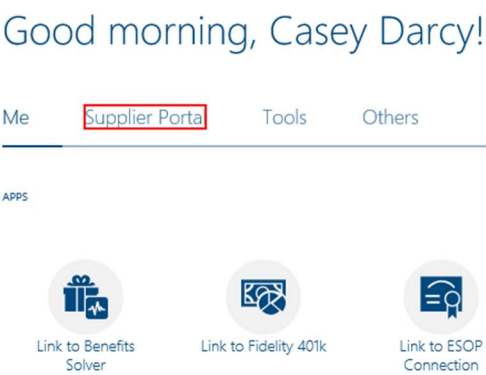
### For Current Suppliers \_ 8.5.19



#### Maintaining Your Supplier Profile

##### Procedure







This exercise will walk you through the process of maintaining your supplier profile, making changes, additions, and an overview of the Supplier Portal.


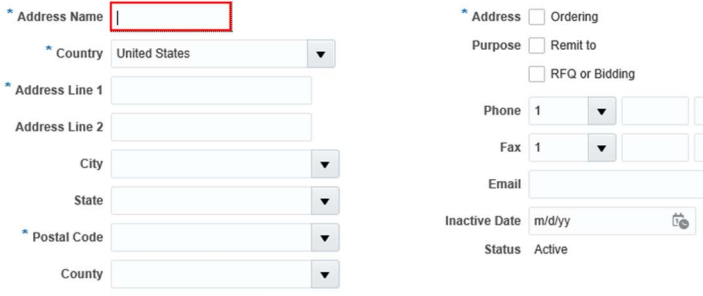













Step	Action
1.	<p>On the Home Page, Click the <b>Supplier Portal</b> tab.</p> 

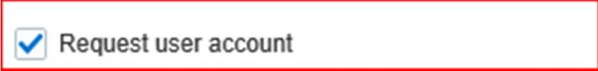






Step	Action
2.	<p>Click the <b>Supplier Portal</b> menu icon.</p>  <p>Supplier Portal</p>
3.	<p>On the Supplier Portal screen, Click the <b>Manage Profile</b> link.</p> <p>Supplier Portal</p> <p>Search <input type="text" value="Orders"/> <input type="button" value="v"/> Order Number <input type="text"/></p> <div> <p><b>Tasks</b></p> <p><b>Qualifications</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Manage Questionnaires</a></li> <li>• <a href="#">View Qualifications</a></li> </ul> <p><b>Company Profile</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Manage Profile</a></li> </ul> </div>
4.	<p>On your profile page, you can review many tabs of information. In order to make any changes, you must first click the <b>Edit</b> icon in the upper right-hand corner of the screen.</p> <p>Click the <b>Edit</b> button.</p>  <p><b>Cancel Change Request</b> <b>Edit</b> <b>Done</b></p>
5.	<p>Use the <b>Supplier Name</b> field to enter your full company name. Please refer to the standard naming conventions document for proper formatting (found at the Resource Center at <a href="http://www.accoes.com">www.accoes.com</a>).</p> <p>Click in the <b>Supplier Name</b> field to make any edits necessary.</p> <p><a href="#">Organization Details</a> <a href="#">Tax Identifiers</a> <a href="#">Addresses</a> <a href="#">Contacts</a> <a href="#">Business Classifications</a></p> <p>General</p> <p>* Supplier Name <input type="text" value="Cal Core Inc"/></p> <p>Supplier Number 11824</p> <p>Supplier Type <input type="text" value="Supplier"/> <input type="button" value="v"/></p>

Step	Action
6.	<p>Use the <b>Supplier Type</b> field and drop-down to select the appropriate supplier type from the list.</p> <p>Click on the <b>Supplier Type</b> drop-down to make any changes or edits necessary.</p> <p><b>Supplier Type</b> <input type="text" value="Supplier"/> ▼</p>
7.	<p>Use the <b>Tax Organization Type</b> field to select the appropriate tax organization type. This should match the information on your W9 form.</p> <p>Click the <b>Tax Organization Type</b> drop-down field to make any changes or edits necessary.</p> <p><b>Tax Organization Type</b> <input type="text" value="LLC"/> ▼</p>
8.	<p>The <b>Corporate Profile</b> section is optional. Make any optional edits you desire.</p> <p>Click in the <b>Year Established</b> field.</p> <p>▲ Corporate Profile</p> <p>Year Established <input type="text"/></p> <p>Mission Statement <input type="text"/></p> <p>Year Incorporated <input type="text"/></p>
9.	<p>The <b>Financial Profile</b> section is optional. Make any optional edits you desire.</p> <p>Click the <b>Fiscal Year End Month</b> list.</p> <p>▲ Financial Profile</p> <p>Fiscal Year End Month <input type="text"/> ▼</p> <p>Current Fiscal Year's Potential Revenue <input type="text"/></p> <p>Preferred Functional Currency <input type="text"/> ▼</p>
10.	<p>Click the <b>Tax Identifiers</b> link.</p> <p><a href="#">Organization Details</a> <b><a href="#">Tax Identifier</a></b> <a href="#">Addresses</a> <a href="#">Contacts</a> <a href="#">Business Classifications</a></p> <p>▲ General</p> <p>* Supplier Name <input type="text" value="Cal Core Inc"/></p> <p>Supplier Number <input type="text" value="11824"/></p> <p>Supplier Type <input type="text" value="Supplier"/> ▼</p> <p>▲ Corporate Profile</p>








Step	Action
11.	<p>Use the <b>Taxpayer Country</b> field to select your taxpayer country.</p> <p>Click on the <b>Taxpayer Country</b> drop-down to make any edits necessary.</p> <p><b>Taxpayer Country</b> United States </p>
12.	<p>Use the <b>Taxpayer ID</b> field to list your Tax ID in one of the following formats: "XX-XXXXXXX" or "XXX-XX-XXXX"</p> <p>Click in the <b>Taxpayer ID</b> field to make any necessary edits.</p> <p><b>Taxpayer ID</b> <input type="text" value="13-3741690"/> </p>
13.	<p>Click the Federal Reportable check box only if you are eligible for a 1099.</p> <p>Click the <b>Federal Income Tax Type</b> list.</p> <p><input type="checkbox"/> Federal reportable</p>
14.	<p>Click the <b>Federal Income Tax Type</b> list.</p> <p>Use the Federal Income Tax Type to fill in your tax type. Please fill in:</p> <ol style="list-style-type: none"> <li>1. "MISC7" if you are providing products and services.</li> <li>2. "MISC1" if you are a landlord or property management company that we are leasing from.</li> <li>3. "MISC4" if you are an attorney.</li> </ol> <p><b>Federal Income Tax Type</b> </p>
15.	<p>Next we will review the Addresses setup for your profile.</p> <p>Click the <b>Addresses</b> link.</p> <p></p>
16.	<p>Review the accuracy of the Remit To address and update as needed.</p> <p>Click the <b>"REMIT"</b> or the Address Name to review and/or edit.</p> <p></p>
17.	<p>Review the accuracy of the Remit To address and update as needed.</p> <p>Your checks are mailed to this address.</p> <p>Click the <b>OK</b> or <b>Cancel</b> to confirm the changes.</p> <p></p>

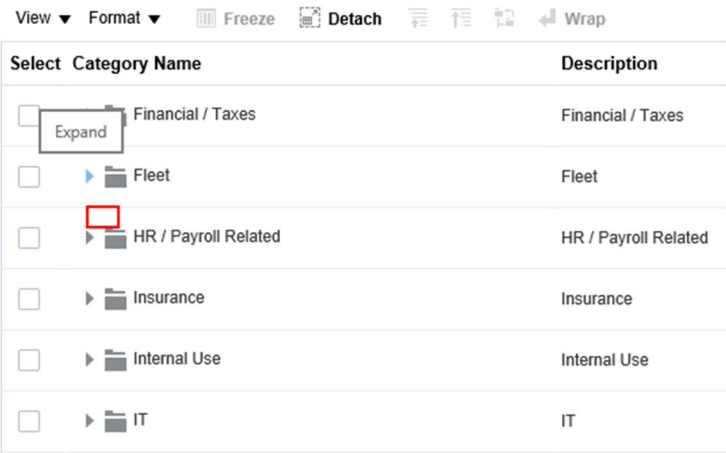
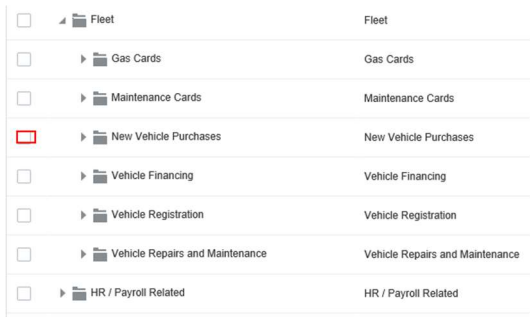



Step	Action
18.	<p>Please add an address for each of your ordering locations. These locations should be marked as "Ordering" only.</p> <p>Click the <b>Create</b> button.</p> 
19.	<p>For all locations, excluding Remit To location, please format your address name as follows:</p> <p><b>"City-Street Name"</b> (ex. Pasadena-Walnut)</p> <p>Click in the <b>Address Name</b> field.</p> <p>Create Address</p> 
20.	<p>Enter your address name.</p> <p>(In this example we used the generic name <b>"Palm Springs-Main"</b>)</p> <p><b>Address Name</b> </p>
21.	<p>Click in the <b>Address Line 1</b> field.</p> <p><b>Address Line 1</b> </p>
22.	<p>Enter your desired street address.</p> <p>(In this example we used a generic address, <b>"123987 Main Street"</b>)</p> <p><b>* Address Line 1</b> </p>
23.	<p>Click in the <b>Postal Code</b> field.</p> <p><b>Postal Code</b> </p>
24.	<p>Enter the postal code of your address.</p> <p>(In this example, we used the generic Postal Code <b>"92262"</b>)</p> <p><b>Postal Code</b> </p>

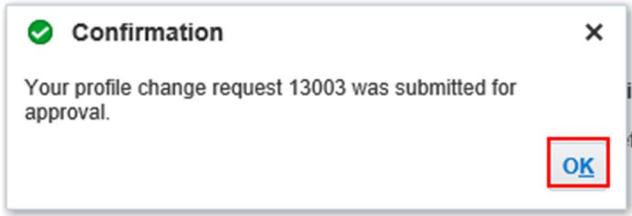


Step	Action
25.	<p>Select whether this address is for "Ordering" or "Remit To"</p> <p>Click the <b>Ordering</b> option.</p> 
26.	<p>Click in the <b>Phone Area Code</b> field.</p> 
27.	<p>Enter your phone number beginning with the Area Code.</p> <p>Enter the desired information into the <b>Phone Area Code</b> field. Enter "<b>858</b>".</p>
28.	<p>Press <b>[Tab]</b>.</p>
29.	<p>Enter the desired information into the <b>Phone</b> field. Enter "<b>3214567</b>".</p>
30.	<p>Click the <b>OK</b> button.</p> 
31.	<p>Ensure that all ordering addresses are listed so that POs/Subcontracts can be sent to the proper location.</p> <p>Next we will review and edit the Contacts.</p> <p>Click the <b>Contacts</b> link.</p> 
32.	<p>Please review and update the contact we setup on your behalf.</p> <p>Click the <b>Name</b> link.</p> 
33.	<p>Please make sure that the correct contact is selected for the "Administrative Contact".</p> <p>Click the <b>Administrative contact</b> object.</p> 

Step	Action
34.	<p>Also, make sure that for this contact or any you create, that the "Request user account" box is selected if you would like that contact to have the ability to update information on the supplier portal.</p> <p>This box needs to be checked for at least one of the contacts on your Supplier Profile.</p> <p>Click the <b>Request user account</b> object.</p> 
35.	<p>Review any changes made, then Click the <b>OK</b> button.</p> 
36.	<p>Add sales contacts for all your ordering locations.</p> <p>Click the <b>Create</b> button.</p> 
37.	<p>It is very important that the following information is provided for each contact added:</p> <ul style="list-style-type: none"> <li>* First Name</li> <li>* Last Name</li> <li>* Phone Number</li> <li>* Email Address</li> </ul> <p>Click in the <b>First Name</b> field.</p> <p>First Name </p>
38.	<p>After you have entered the Name, Phone and Email, you can also add an address affiliated to this contact.</p> <p>Click the <b>Select and Add</b> button.</p> 
39.	<p>Select the address you would like assigned to this contact.</p> <p>Click the <b>Address</b> cell.</p> <p></p>
40.	<p>Click the <b>Apply</b> button.</p> 



Step	Action
41.	Click the <b>OK</b> button. 
42.	Review and make sure all required fields are complete, the "Administrative contact" box is checked if desired for this contact, and the "Request user account" box is checked.  Click the <b>OK</b> button. 
43.	To add your classification status, Click the <b>Business Classifications</b> link. 
44.	Review the classification already setup or add a new classification.  Click the <b>Add</b> button. 
45.	If you accidentally click the <b>Add</b> ("+") button at any point, you can remove the row by simply clicking the <b>Delete</b> ("X") button.  Click the <b>Delete</b> button. 
46.	The <b>Products and Services</b> section is optional.  Click the <b>Products and Services</b> link. 
47.	You can select and add multiple products and services.  Click the <b>Select and Add</b> button. 

Step	Action
48.	<p>Select an additional Products and Services from the drop-down parent categories.</p> <p>Click the <b>Category Name</b> button.</p>  <p>The screenshot shows a table with two columns: 'Category Name' and 'Description'. The 'Category Name' column has a red box around the 'Expand' button next to 'Financial / Taxes'. The table lists several categories: Financial / Taxes, Fleet, HR / Payroll Related, Insurance, Internal Use, and IT.</p>
49.	<p>Click the <b>Select</b> option.</p>  <p>The screenshot shows a table with two columns: 'Category Name' and 'Description'. The 'Category Name' column has a red box around the 'Select' button next to 'New Vehicle Purchases'. The table lists several sub-categories: Fleet, Gas Cards, Maintenance Cards, New Vehicle Purchases, Vehicle Financing, Vehicle Registration, Vehicle Repairs and Maintenance, and HR / Payroll Related.</p>
50.	<p>Click the <b>OK</b> button.</p>  <p>The screenshot shows a red box around the 'OK' button.</p>
51.	<p>Once you have completed making the edits and changes, Click the <b>Review Changes</b> button.</p>  <p>The screenshot shows a red box around the 'Review Changes' button.</p>
52.	<p>Click the <b>Submit</b> button.</p>  <p>The screenshot shows a red box around the 'Submit' button.</p>

Step	Action
53.	<p>Click the <b>OK</b> button.</p>  <p>A confirmation dialog box with a green checkmark icon and the title 'Confirmation'. The text inside reads: 'Your profile change request 13003 was submitted for approval.' There is a close button (X) in the top right corner and an 'OK' button in the bottom right corner, which is highlighted with a red rectangle.</p>
54.	<p>Click the <b>Done</b> button.</p>  <p>A blue button with the text 'Done' in white, highlighted with a red rectangle.</p>
55.	<p>Click the <b>Home</b> object.</p>  <p>Three icons are shown: a blue house icon (Home) highlighted with a red rectangle, a blue map icon with a red circle containing the letter 'S' (Supplier), and a circular icon with the letters 'CD' and a checkmark (CD).</p>
56.	<p>You have now completed the exercise on maintaining the supplier profile. <b>End of Procedure.</b></p>