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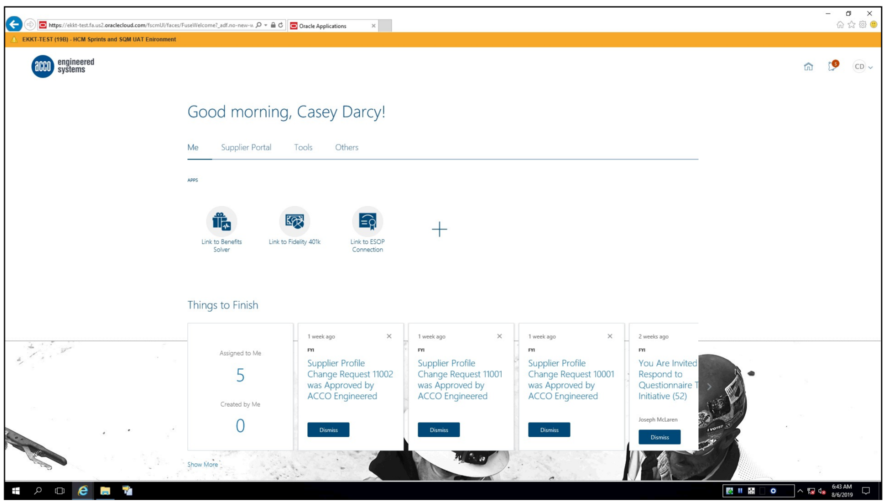
Supplier Management & SQM

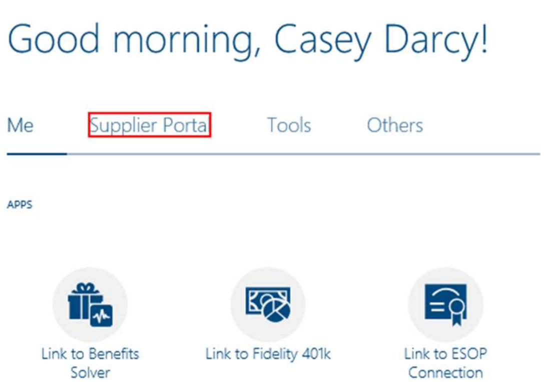
For Current Suppliers _ 8.5.19

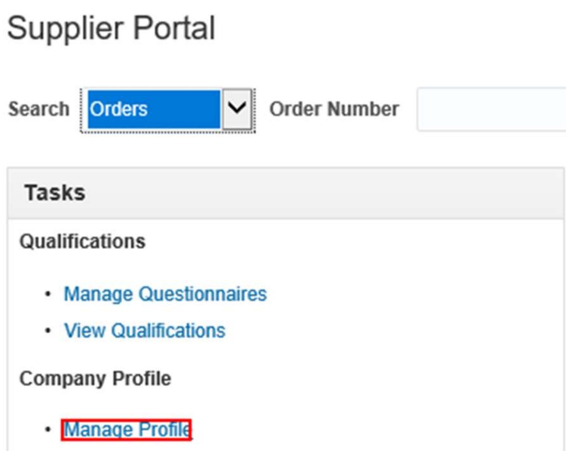
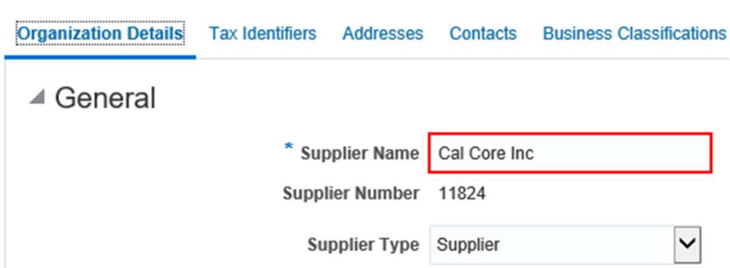
Maintaining Your Supplier Profile

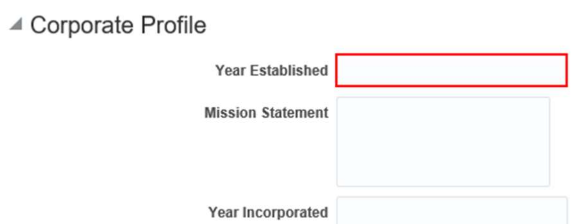
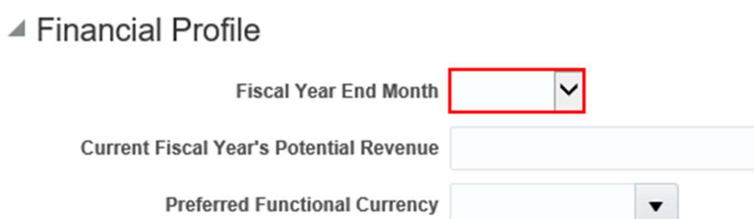
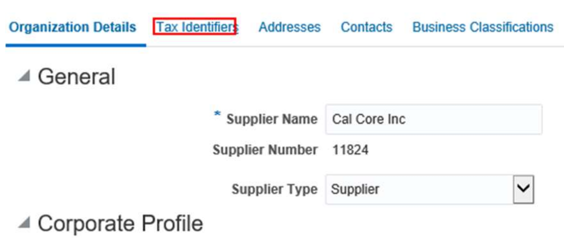
Procedure

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

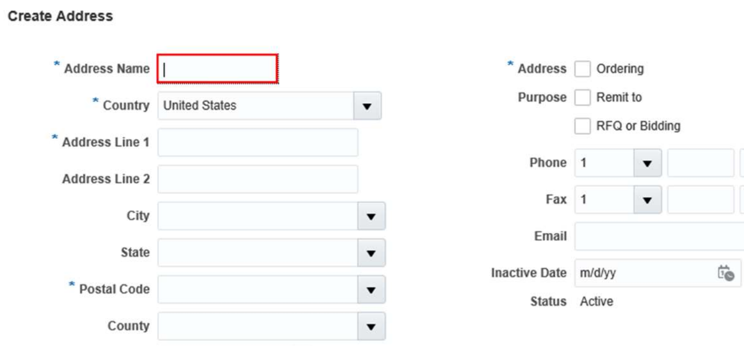
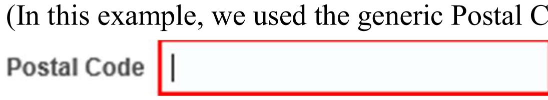


Step	Action
1.	On the Home Page, Click the **Supplier Portal** tab. 

Step	Action
2.	Click the **Supplier Portal** menu icon. 
3.	On the Supplier Portal screen, Click the **Manage Profile** link. 
4.	On your profile page, you can review many tabs of information. In order to make any changes, you must first click the **Edit** icon in the upper right-hand corner of the screen. Click the **Edit** button. 
5.	Use the **Supplier Name** field to enter your full company name. Please refer to the standard naming conventions document for proper formatting (found at the Resource Center at www.accoes.com). Click in the **Supplier Name** field to make any edits necessary. 

Step	Action
6.	Use the **Supplier Type** field and drop-down to select the appropriate supplier type from the list. Click on the **Supplier Type** drop-down to make any changes or edits necessary. 
7.	Use the **Tax Organization Type** field to select the appropriate tax organization type. This should match the information on your W9 form. Click the **Tax Organization Type** drop-down field to make any changes or edits necessary. 
8.	The **Corporate Profile** section is optional. Make any optional edits you desire. Click in the **Year Established** field. 
9.	The **Financial Profile** section is optional. Make any optional edits you desire. Click the **Fiscal Year End Month** list. 
10.	Click the **Tax Identifiers** link. 

Step	Action
11.	Use the **Taxpayer Country** field to select your taxpayer country. Click on the **Taxpayer Country** drop-down to make any edits necessary. Taxpayer Country United States
12.	Use the **Taxpayer ID** field to list your Tax ID in one of the following formats: "**XX-XXXXXXX**" or **"XXX-XX-XXXX**" Click in the **Taxpayer ID** field to make any necessary edits. Taxpayer ID 81-3741690 ×
13.	Click the Federal Reportable check box only if you are eligible for a 1099. Click the **Federal Income Tax Type** list. Federal reportable
14.	Click the **Federal Income Tax Type** list. Use the Federal Income Tax Type to fill in your tax type. Please fill in: 1. **"MISC7"** if you are providing products and services. 2. **"MISC1"** if you are a landlord or property management company that we are leasing from. 3. **"MISC4"** if you are an attorney. Federal Income Tax Type
15.	Next we will review the Addresses setup for your profile. Click the **Addresses** link. Addresses
16.	Review the accuracy of the Remit To address and update as needed. Click the **"REMIT"** or the Address Name to review and/or edit. REMIT
17.	Review the accuracy of the Remit To address and update as needed. Your checks are mailed to this address. Click the **OK** or **Cancel** to confirm the changes. Cancel

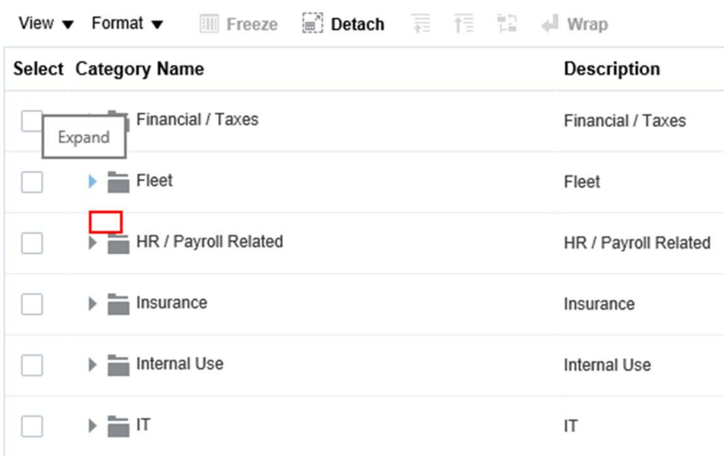
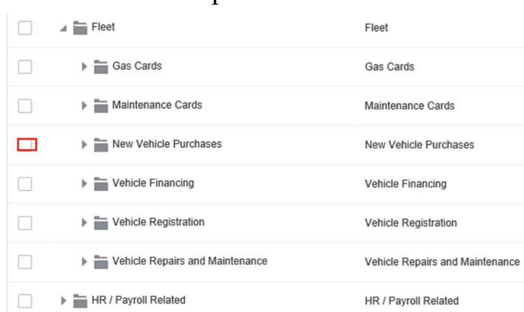
Step	Action
18.	Please add an address for each of your ordering locations. These locations should be marked as "Ordering" only. Click the **Create** button. 
19.	For all locations, excluding Remit To location, please format your address name as follows: "**City-Street Name**" (ex. Pasadena-Walnut) Click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

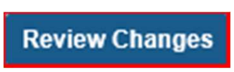
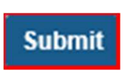
Step	Action
25.	Select whether this address is for "Ordering" or "Remit To" Click the **Ordering** option. Ordering
26.	Click in the **Phone Area Code** field.
27.	Enter your phone number beginning with the Area Code. Enter the desired information into the **Phone Area Code** field. Enter "**858**".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

Step	Action
34.	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. This box needs to be checked for at least one of the contacts on your Supplier Profile. Click the **Request user account** object. Request user account
35.	Review any changes made, then Click the **OK** button. OK
36.	Add sales contacts for all your ordering locations. Click the **Create** button.
37.	It is very important that the following information is provided for each contact added: * First Name * Last Name * Phone Number * Email Address Click in the **First Name** field. First Name
38.	After you have entered the Name, Phone and Email, you can also add an address affiliated to this contact. Click the **Select and Add** button.
39.	Select the address you would like assigned to this contact. Click the **Address** cell. 531 Park Avenue,MILLBRAE, CA 94030San
40.	Click the **Apply** button. Apply

Step	Action
41.	Click the **OK** 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 **OK** button. 
43.	To add your classification status, Click the **Business Classifications** link. 
44.	Review the classifcation already setup or add a new classification. Click the **Add** button. 
45.	If you accidentally click the **Add** ("+") button at any point, you can remove the row by simply clicking the **Delete** ("**X**") button. Click the **Delete** button. 
46.	The **Products and Services** section is optional. Click the **Products and Services** link. 
47.	You can select and add multiple products and services. Click the **Select and Add** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>48.</td><td>Select an additional Products and Services from the drop-down parent categories.

Click the Category Name button.

</td></tr>
<tr><td>49.</td><td>Click the Select option.

</td></tr>
<tr><td>50.</td><td>Click the OK button.

</td></tr>
<tr><td>51.</td><td>Once you have completed making the edits and changes,
Click the Review Changes button.

</td></tr>
<tr><td>52.</td><td>Click the Submit button.

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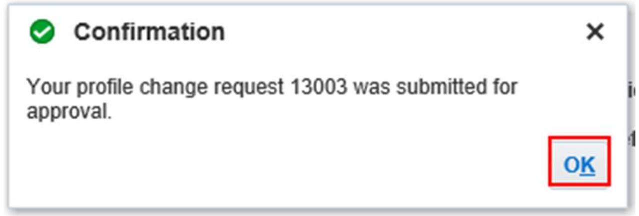
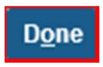
Step	Action
53.	Click the **OK** button. 
54.	Click the **Done** button. 
55.	Click the **Home** object. 
56.	You have now completed the exercise on maintaining the supplier profile. **End of Procedure.**