

Create a User Account

1. In the Supplier Portal, under Company Profile select Manage Profile and click the Edit button. Confirm you wish to continue with the change request.
2. Add a brief description of the changes you are making and click on Contacts.
3. Select Add (the plus sign) to enter a new contact or highlight the current contact you want to edit and click the pencil icon.
4. Fill in the contact details (mandatory fields are marked with an asterisk *). Only Administrative contacts can edit the profile.
5. Click the Select & Add icon to add the contact's address(es)

1

Company Profile

- Manage Profile

Edit Done

Warning POZ-2130390 Making edits will create a change request for the profile. Do you want to continue? Yes No

2

Edit Profile Change Request: 281001

Change Description adding contact

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

Actions View Format **+** ✎ ✕ Status Active Freeze Detach Wrap

Name
Contact, Primary

3

4

5

Create Contact

Salutation

* First Name Joel

Middle Name

* Last Name Smith

Job Title

Administrative contact

Phone

Mobile

Fax

Email Joe@work.com

Status Active

Contact Addresses

Actions View Format ✎ ✕ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				

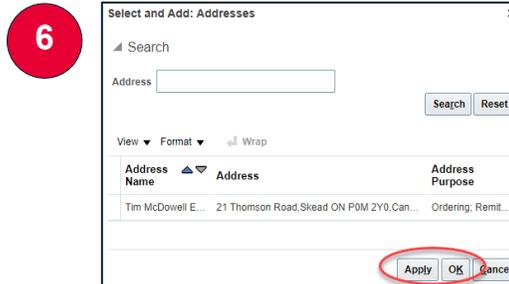
Columns Hidden 5

Create a User Account

- From the list of available addresses, highlight the line(s) you want associated with the contact and click apply. Click OK.
- Request user account by checking the box and select and add or delete roles as required. Click OK.
- Click on Review Changes. Until you click Submit, your changes are only pending.
- Check all entries for accuracy. If changes are required, click Edit otherwise click Submit. If you do not hit submit, it is incomplete and will not process.

⚠ If you create a user account for a contact, it cannot be removed, only deactivated and it cannot be used again

6



Select and Add: Addresses

Search

Address

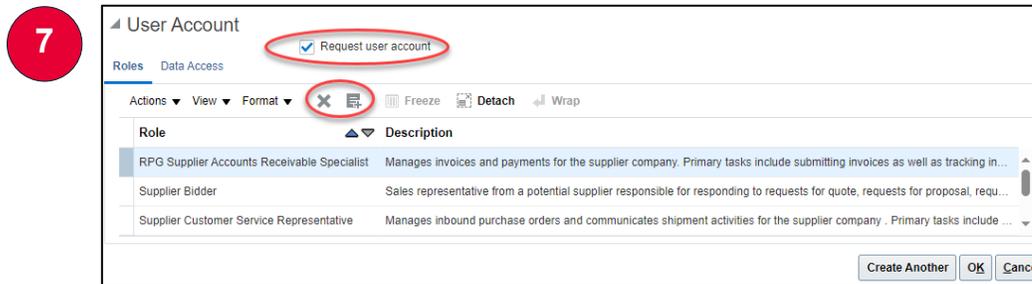
Search Reset

View Format Wrap

Address Name	Address	Address Purpose
Tim McDowell E...	21 Thomson Road, Skead ON P0M 2Y0, Can...	Ordering, Remit...

Apply OK Cancel

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User Account

Request user account

Roles Data Access

Actions View Format Freeze Detach Wrap

Role	Description
RPG Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include ...

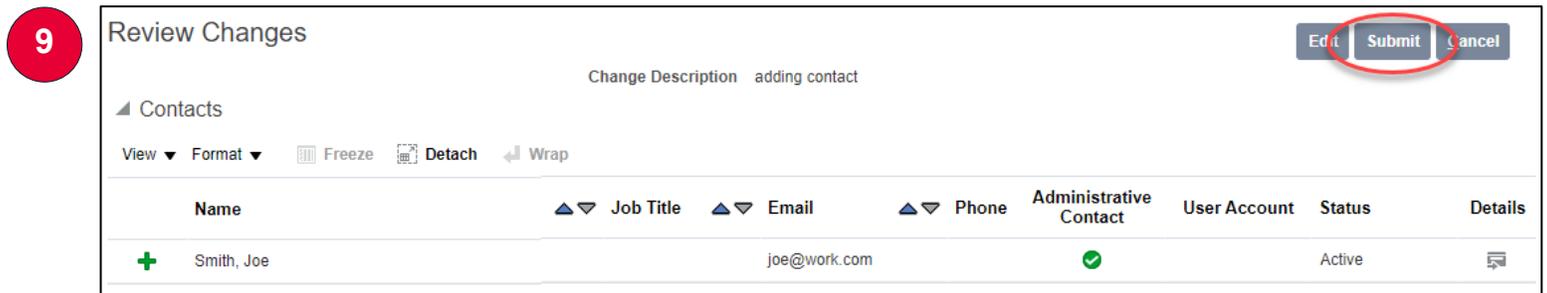
Create Another OK Cancel

8



Delete Change Request Review Changes Save Save and Close Cancel

9



Review Changes

Change Description adding contact

Edit Submit Cancel

Contacts

View Format Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
+ Smith, Joe		joe@work.com		✓		Active	