

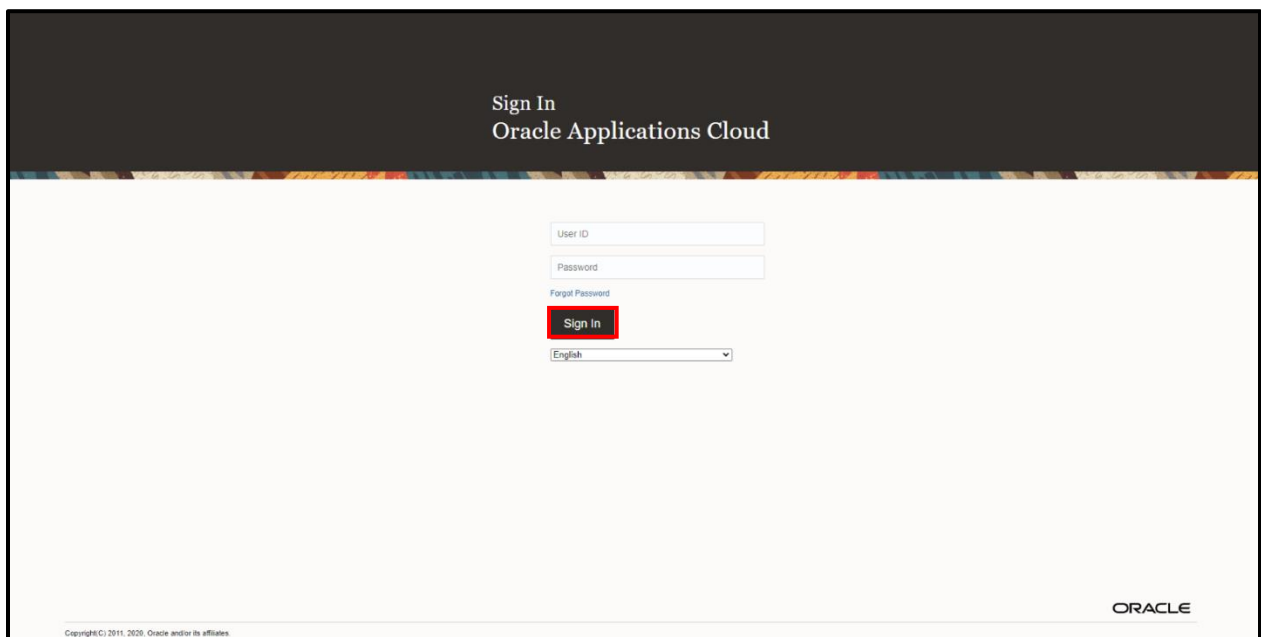
When a Supplier Registration is approved, a supplier record is created, and the supplier will receive an email from the PLCB with a link to the new Oracle Supplier Portal. The Supplier Portal enables you, the supplier, to see activity between you and the PLCB. It also allows you to enter changes to your Supplier Profile, which will be reviewed and accepted or rejected by the Vendor Data Management Unit within the PLCB.

As a supplier, you are responsible for managing your profile information including contact and address data. You are also responsible for maintaining current banking information to ensure you can be paid by the PLCB.

Note: Once you have entered changes to your Profile in the Oracle Supplier Portal, **you must select Submit to send your change request to PLCB for review and approval.** If you do not submit your changes, they will stay in the Supplier Portal waiting to be completed and your supplier record will not be updated in Oracle.

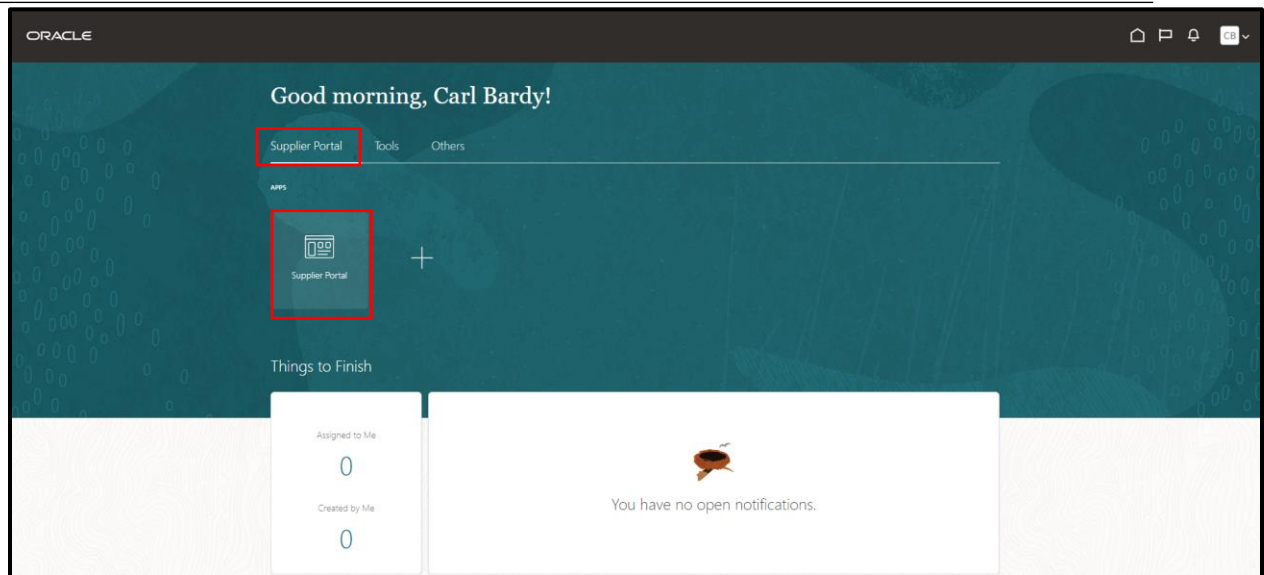
In this lesson, we will demonstrate how to update Supplier Profile data using the Supplier Portal.

1. Log in to the PLCB Supplier Portal:
 - a. Enter User ID
 - b. Enter Password
 - c. Select **Sign In**

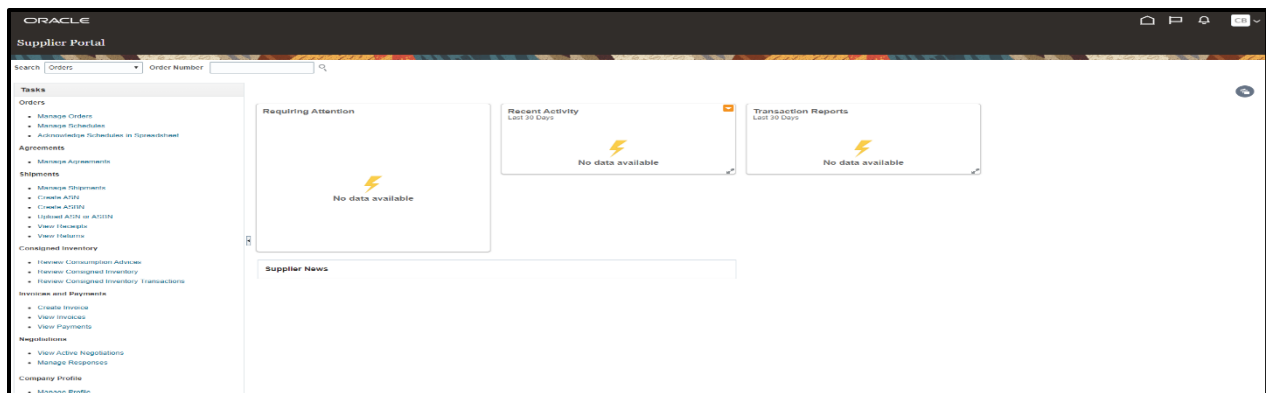


The screenshot shows the Oracle Applications Cloud Sign In page. At the top, there is a dark header with the text "Sign In" and "Oracle Applications Cloud". Below the header, there is a white background with a colorful horizontal bar. The main content area contains a sign-in form with the following elements: a "User ID" input field, a "Password" input field, a "Forgot Password" link, a red "Sign In" button, and a language dropdown menu currently set to "English". The Oracle logo is visible in the bottom right corner, and a small copyright notice "Copyright(C) 2011, 2020, Oracle and/or its affiliates" is in the bottom left corner.

2. Go to the *Supplier Portal* tab and select the **Supplier Portal** tile.



3. You will see a dashboard of recent activity and your transaction history with the PLCB.
To update your Supplier Profile, use *Menu* on the left-hand side to find *Manage Profile*.
 - a. Select **Manage Profile**



4. This will bring you to your *Company Profile* page.
 - a. Select **Edit** on the upper right of the page

ORACLE

Company Profile

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

General

Company MAXON FURNITURE INC

Supplier Number 35685

Supplier Type Supplier

Tax Organization Type Unknown

Status Active

Attachments None

Identification

D-U-N-S Number

Customer Number

SIC

Corporate Profile

Year Established

Mission Statement

Year Incorporated

Financial Profile

Current Fiscal Year's Potential Revenue

Preferred Functional Currency

Fiscal Year End Month

Chief Executive Title

Chief Executive Name

Principal Title

Principal Name

Edit Done

5. You will see a warning message that editing the profile will create a change request.
 - a. Select **Yes**

ORACLE

Company Profile

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

General

Company MAXON FURNITURE INC

Supplier Number 35685

Supplier Type Supplier

Tax Organization Type Unknown

Status Active

Attachments None

Identification

D-U-N-S Number

Customer Number

SIC

Corporate Profile

Year Established

Mission Statement

Year Incorporated

Financial Profile

Current Fiscal Year's Potential Revenue

Preferred Functional Currency

Fiscal Year End Month

Chief Executive Title

Chief Executive Name

Principal Title

Principal Name

Edit Done

Warning

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

Yes No

6. Updating Address Information
 - a. Go to the *Addresses* tab
7. A list of the addresses you have set up should display. To edit an existing address:
 - a. Select the **Address Name** of the address you want to change

Oracle
Edit Profile Change Request: 8001

Change Description

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

Actions View Format + Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
P-IA-MUSCA-01	PO BOX 1109 MUSCATINE, IA 52761-0071	8008764724	Ordering		Active
PA-IL-CHICA-01	BANK OF AMERICAATTN MAXON,13371 COLLECTION CENTER DR,CHICAGO, IL 60693-0000	5632997819	Remit to		Active

Columns Hidden 3

8. The details of the selected address will be displayed, allowing you to update the information. Make your edits and either select **OK** to accept the change and go back to the list of addresses, or select **Cancel** to return to the list of addresses without making a change.

Oracle
Edit Profile Change Request: 8001

Change Description

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

Actions View Format + Status Active Freeze Wrap

Edit Address: P-IA-MUSCA-01

* Address Name P-IA-MUSCA-01

* Country United States

Address Line 1 PO BOX 1109

Address Line 2 PO BOX 1109

City MUSCATINE

State IA

Postal Code 52761-0071

Postal Code Ext.

Language

* Address ☒ Ordering
Purpose ☐ Remit to
☐ RFQ or Bidding

Phone (800) 876-4724

Fax

Email maxonservice@maxonmail.com

Inactive Date 9/14/21

Status Inactive

OK Cancel

9. To add an Address:
 - a. Select +

Oracle
Edit Profile Change Request: 8001

Change Description

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

Actions View Format + Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
P-IA-MUSCA-01	PO BOX 1109 MUSCATINE, IA 52761-0071	8008764724	Ordering		Active
PA-IL-CHICA-01	BANK OF AMERICAATTN MAXON,13371 COLLECTION CENTER DR,CHICAGO, IL 60693-0000	5632997819	Remit to		Active

Columns Hidden 3

10. A window will appear allowing you to enter a new address.

- Enter a name to identify the address in the *Address Name* field
- Select the country in which the address is located from the *Country* field
- Enter the street address in the *Address Line 1* field
- Enter additional address information in the *Address Line 2* field
- Enter the city name in the *City* field (you may use the list or start entering the name)
- Select the address state abbreviation from the *State* field
- Enter the postal code associated with the address in the *Postal Code* field

11. Address Purpose (minimum of one box must be checked)

Note: A single address may be tied to multiple Address Purposes, or separate addresses may be created with differing Address Purposes.

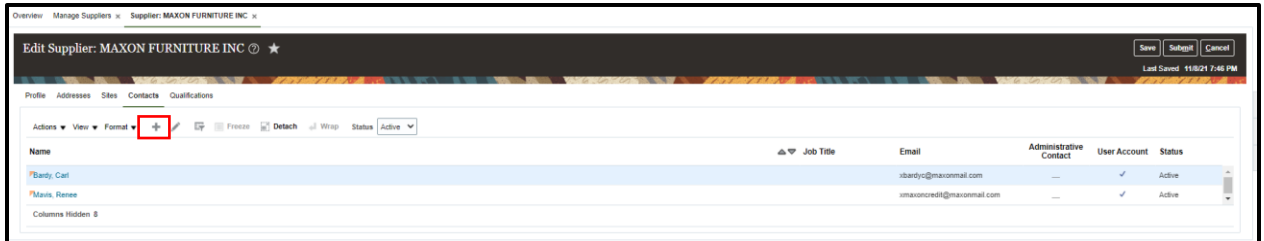
- Select **Ordering**, if appropriate (the ordering address is used for Purchase Orders)
- Select **Remit to**, if appropriate (the Remit to address is used for payments)
- Select **RFQ or Bidding**, if appropriate (the RFQ or Bidding address is used for solicitations, typically your sales or administrative location)
- Select **Save and Close** to add the Address

12. Select **Contacts** to add a Contact to the new address.

Address Name	Address	Phone	Address Purpose	Status
P-IA-MUSCA-01	PO Box 1109, Muscatine, IA 52761-0071	8008764724	Ordering	Active
P-IA-MUSCA-02	P Box 14161, Muscatine, IA 52761-0072	+1 (800) 12558845	Ordering, Remit to	Active
P-IL-CHICA-01	BANK OF AMERICA/ITN MAXION, 13271 COLLECTION CENTER DR, CHICAGO, IL 60685-0000	5632997819	Remit to	Active

13. The screen will display the existing contacts that have been created. You may edit an existing contact by selecting the name from the list, or add a new contact. To add a new contact:

- a. Select +

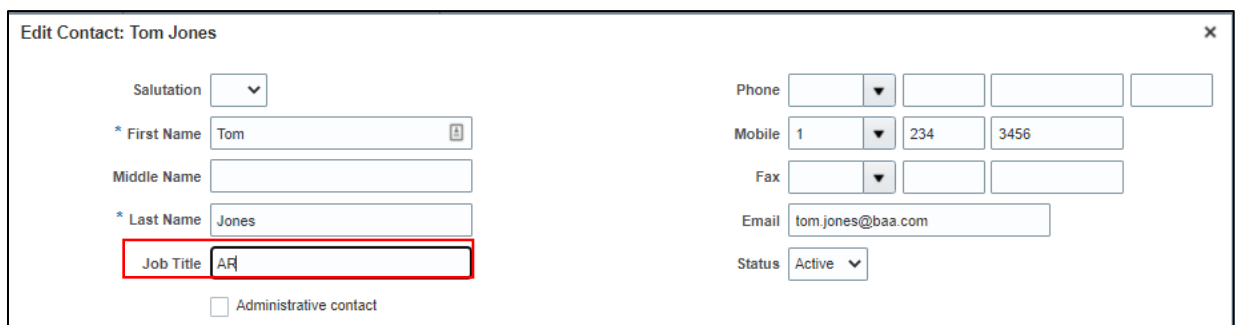


The screenshot shows the 'Edit Supplier: MAXON FURNITURE INC' page. At the top, there are tabs for 'Profile', 'Addresses', 'Sites', 'Contacts', and 'Qualifications'. Below the tabs, there is a table of contacts. The table has columns for 'Name', 'Job Title', 'Email', 'Administrative Contact', 'User Account', and 'Status'. Two contacts are listed: 'Bardy, Carl' and 'Davis, Renee'. A red box highlights the '+' icon in the 'Actions' column of the 'Bardy, Carl' row.

14. A *Create Contact* pane will appear.

- a. Enter the contact's first name in the *First Name* field
- b. Enter the contact's last name in the *Last Name* field
- c. Enter a Job Title (optional) in the *Job Title* field

Note: One person in your organization should be assigned a Job Title of “AR” (accounts receivable). This person will receive a remittance report from the PLCB.



The screenshot shows the 'Edit Contact: Tom Jones' form. The form has fields for 'Salutation', 'First Name', 'Middle Name', 'Last Name', 'Job Title', 'Phone', 'Mobile', 'Fax', 'Email', and 'Status'. The 'Job Title' field is highlighted with a red box and contains the value 'AR'. Below the 'Job Title' field, there is a checkbox labeled 'Administrative contact'.

- d. Select **Administrative Contact** if the contact is an administrative contact

Note: Every supplier account should have one administrative contact set up to receive PLCB communications for the organization.

- e. Enter a phone number (optional) in the *Phone* or *Mobile* fields
- f. Enter an email address in the *Email* field

15. Scroll to the *Contact Address* section of the screen to associate the new contact to a Contact Address.
 - a. Select the **Select and Add** icon to create the association between Contact and Contact Address.

16. A *Select and Add Addresses* pane will appear showing the existing addresses that have been established for the supplier.
 - a. Select one or more lines from the list of addresses
 - b. Select **Apply** to create the relationship(s)

Manage Supplier Profile Changes in Supplier Portal Quick Reference

The screenshot shows the 'Create Contact' form for 'Supplier: MAXON FURNITURE INC.'. The form includes fields for 'First Name' (Tom), 'Middle Name', 'Last Name' (Jones), 'Job Title', 'Phone', 'Mobile', 'Fax', and 'Email' (tom.jones@max.com). A modal window titled 'Select and Add: Addresses' is open, displaying a table of addresses. The 'Apply' button at the bottom of the modal is highlighted with a red box.

Address Name	Address	Address Purpose
P-IA-MUSCA-01	PO BOX 1109 MUSCATINE, IA 52761-0071	Ordering
P-IA-MUSCA-02	PO Box 14181 Muscatine, IA Muscatine5276...	Ordering - Remit to
P-IL-CHICA-01	BANK OF AMERICA ATTN MAXON, 13371 ...	Remit to

c. Select **OK** to close the window and return to the *Create Contact* pane

This screenshot is identical to the one above, showing the 'Create Contact' form and the 'Select and Add: Addresses' modal. In this instance, the 'OK' button at the bottom of the modal is highlighted with a red box.

Overview Manage Suppliers x Supplier: MAXON FURNITURE INC. x

Create Contact ⓘ

Save Save and Close Save and Create Another Cancel

Salutation ▼

* First Name Tom ⓘ

Middle Name

* Last Name Jones

Job Title

☐ Administrative contact

Phone

Mobile 1 234 3456

Fax

Email tom.jones@baa.com

Status Active ▼

Additional Information

Contact Addresses

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
P-IA-MUSCA-02	P-Box 14161 Muscatine, IA Muscatine52761-0072	+1 (808)1255845	Ordering; Remit to	Active

Columns Hidden 4

User Account ⓘ

☐ Create user account

Roles Data Access

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Role	Description
No data to display.	

17. Scroll to the *User Account* section of the pane. In this section, you can see the system access roles that are available to you as a supplier. Request a user login for the new contact.

a. Select **Create User Account**

Create Contact ⓘ

Salutation ▼

* First Name Tom ⓘ

Middle Name

* Last Name Jones

Job Title

☒ Administrative contact

Phone

Mobile 1 53299 7820

Fax

Email tom.jones@baa.com

Status Active ▼

Contact Addresses

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
P-IA-MUSCA-02	P-Box 14161 Muscatine, IA Muscatine52761-0072	+1 (808)1255845	Ordering; Remit to	Active

Columns Hidden 5

User Account

☒ Create user account

Roles Data Access

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Role	Description
PLCB Supplier Portal Bidder JR	Role provides access to -View active negotiations -Manage responses
PLCB Supplier Portal Inventory Manager JR	Role provides access to - Review consigned inventory - Review consumption advices
PLCB Supplier Portal Invoice Transaction JR	Role provides access to - Create invoices

Create Another OK Cancel

18. If additional contacts need to be added, select **Create Another**, otherwise, select **OK** to return to the *Edit Profile Change Request* pane.

Create Contact

Salutation:

* First Name:

Middle Name:

* Last Name:

Job Title:

☐ Administrative contact

Phone:

Mobile:

Fax:

Email:

Status:

Contact Addresses

Actions: View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
P-IA-MUSCA-02	PBox 14181 Muscatine, IA Muscatine52761-0072	+1 (808)1255845	Ordering; Remit to	Active

Columns Hidden: 5

User Account

Roles: Data Access ☒ E-mail is required when requesting a user account

Actions: View Format Freeze Detach Wrap

Role	Description
PLCB Supplier Portal Bidder JR	Role provides access to - View active negotiations - Manage responses
PLCB Supplier Portal Inventory Manager JR	Role provides access to - Review consigned inventory - Review consumption advices
PLCB Supplier Portal Invoice Transaction JR	Role provides access to - Create invoices

Create Another **OK** Cancel

19. Add banking information.

Note: As a supplier, you are responsible for adding and maintaining your banking information so you are correctly paid by the PCLB.

a. Select **Payments**

ORACLE

Edit Profile Change Request: 5001

Change Description:

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

Payment Methods Bank Accounts

Actions: View Format Freeze Detach Wrap

Default	Payment Method	From Date	To Date
<input checked="" type="checkbox"/>	ACH	1/1/20	mid/yy
<input type="checkbox"/>	Check	10/2/08	mid/yy
<input type="checkbox"/>	PRENOTE	1/1/20	mid/yy

b. Select **Bank Accounts**

Oracle
Edit Profile Change Request: 5001

Change Description

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

Payment Method **Bank Accounts**

Actions View Format + X Freeze Detach Wrap

Default	Payment Method	From Date	To Date
	ACH	1/1/20	mid/yy
	Check	10/2/08	mid/yy
	PRENOTE	1/1/20	mid/yy

c. Select + to add a bank account

Oracle
Edit Profile Change Request: 5001

Change Description

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

Payment Methods **Bank Accounts**

Actions View Format + X Freeze Wrap

Primary	Account Number	IBAN	Currency	Bank Name
No data to display. Columns Hidden: 8				

d. The *Create Bank Account* pane will display

Create Bank Account

Enter account number or IBAN unless account number is marked as required.

* Country United States

* Account Number 23456789

* Bank Name AMERICAN BANK

* Bank Branch AMERICAN BANK - 031302997

☐ Allow international payments

From Date 11/9/21

Inactive On mid/yy

IBAN

Currency USD

Additional Information

Account Name

Alternate Account Name

Account Suffix

Check Digits

* Account Type Checking

* Description Bank Account

Create Another OK Cancel

e. Select the country where the bank account is located from the *Country* field

f. Enter the bank account number in the *Account Number* field

g. Select **Bank Name** from the list

h. Select **Bank Branch** from the list

- i. Select **Allow international payments**, if appropriate
- j. *From Date* will default to today's date
- k. Enter IBAN if international payments are allowed
- l. Select **USD** from the **Currency** list
- m. Select **Account Type** from the list
- n. Enter Description
- o. Select **OK** to add the bank to your profile and return to the **Edit Profile Change Request**

Note: Your supplier record will not be updated in Oracle until you have reviewed your Change Request and selected **Submit** to send it to the PLCB for review and approval.

Create Bank Account

Enter account number or IBAN unless account number is marked as required.

* Country: United States

* Account Number: 23456789

* Bank Name: AMERICAN BANK

* Bank Branch: AMERICAN BANK - 031302997

☐ Allow international payments

From Date: 11/9/21

Inactive On: m/d/yy

IBAN:

Currency: USD

Additional Information

Account Name:

Alternate Account Name:

Account Suffix:

Check Digits:

* Account Type: Checking

* Description: Bank Account

Create Another OK Cancel

ORACLE

Edit Profile Change Request: 19001

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

Primary	Account Number	IBAN	Currency	Bank Name
	100008789		USD	AMERICAN BANK

Columns Hidden: 8

20. Edit Tax Organization Type on Organization Details

- a. Go to **Organization Details** tab, and change the **Tax Organization Type** field from Unknown to the correct designation for your business (S Corporation, etc.) by selecting a value from the drop-down list

* Change Description: Changing Tax Organization Type

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

General

Supplier Name: 1895 NEW HOLLAND ROAD LLC
Supplier Number: 35005
Supplier Type: Lessors

Identification

D-U-N-S Number:
Customer Number:
SIC:

Corporate Profile

Year Established:
Mission Statement:

Tax Organization Type: Unknown
Status: Unknown
Attachments: C Corporation, S Corporation, Partnership, Limited Liability Company-C corp, Limited Liability Company-S corp, Limited Liability Company-Partnership, Foreign Partnership, Joint Venture, Government, Trust/Estate Tax Exempt, Foreign Vendor, Foreign Government Agency, Foreign Individual

National Insurance Number:
Corporate Web Site:
Chief Executive Title:
Chief Executive Name:
Principal Title:
Principal Name:

b. Click on **Save** button

Edit Profile Change Request: 37001

* Change Description:

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

Buttons: Delete Change Request, Review Changes, **Save**, Save and Close, Cancel

21. Select **Review Changes** to see the changes that have been made to the account.

Note: Your supplier record will not be updated in Oracle until you have reviewed your Change Request and selected **Submit** to send it to the PLCB for review and approval.

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Edit Profile Change Request: 19001

* Change Description: additional changes

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

Payment Methods: Bank Accounts

Primary	Account Number	IBAN	Currency	Bank Name
Primary	XXXXX759		USD	AMERICAN BANK

Columns Hidden: 8

Buttons: Delete Change Request, **Review Changes**, Save, Save and Close, Cancel

22. Review the changes that have been made and select **Submit** to send the Change Request to the PLCB for review.

Manage Supplier Profile Changes in Supplier Portal Quick Reference

Review Changes

Change Description

additional changes

Addresses

View

Format

Freeze

Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
P-JA-MUSCA-02	PBox 14161 Muscatine, IA Muscatine52761-00721	+1 (800)1255845	Ordering; Remit to		Active	

Columns Hidden: 3

Contacts

View

Format

Freeze

Detach

Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Jones, Tom		tom.jones@baa.com				Active	

Columns Hidden: 7

Bank Accounts

View

Format

Freeze

Wrap

Primary	Account Number	IBAN	Currency	Bank Name	Details
	XXXX8789		USD	AMERICAN BANK	

Columns Hidden: 8

23. A summary screen will appear with a message that the Change Request has been submitted for approval.
- a. Select **OK**

Company Profile

Cancel Change Request

Edit

Done

There is a profile change request pending approval. You may edit to make additional changes.

Last Change Request

19001

Requested By

Barry, Carl

Request Status

Pending Approval

Request Date

11/9/21

Change Description

additional changes

Organization Details

Tax Identifiers

Addresses

Contacts

Payments

Business Classifications

Products and Services

View

Format

Status

Active

Freeze

Detach

Wrap

Address Name	Address	Phone	Address Purpose	Status
P-JA-MUSCA-01	PO BOX 1109 MUSCATINE, IA 52761-0071	8008764724	Ordering	Active
P-JA-MUSCA-02	P Box 14161 Muscatine, IA Muscatine52761-0072	+1 (800)1255845	Ordering; Remit to	Active
P-IL-CHICA-01	BANK OF AMERICA ATTN: MAJON, 13371 COLLECTION CENTER DR, CHICAGO, IL 60693-0000	5632997519	Remit to	Active

Columns Hidden: 5

Confirmation

Your profile change request 19001 was submitted for approval.

OK