Manage Addresses and Contacts

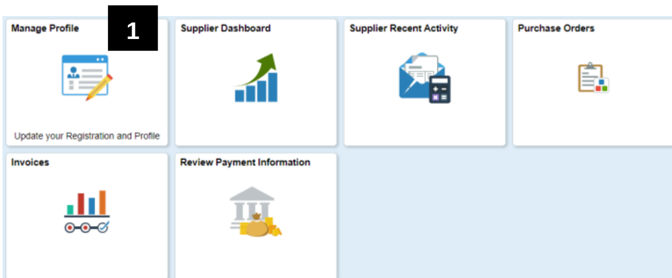
Navigation

http://procurement.umich.edu/supplier-resources/supplier-portal

Description

Supplier users may submit requests to add and modify addresses and contacts. This job aid describes how to manage contact and address information.

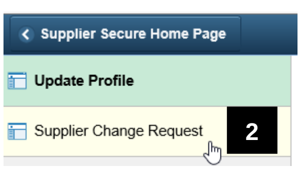
Supplier Portal



1. Click on the **Manage Profile** tile.

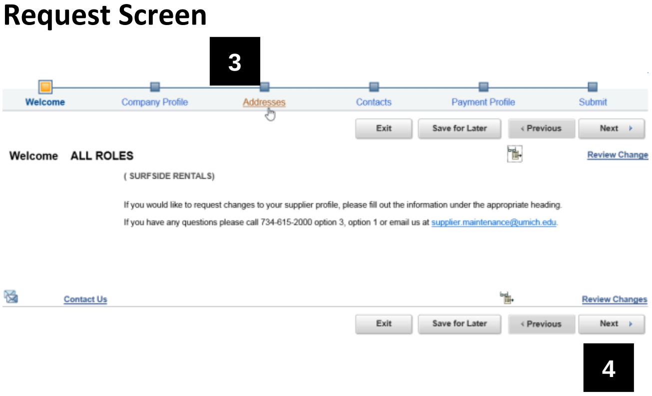
Note: For login instructions, refer to *Logging into the eSettlements Supplier Portal*. For more information on the Supplier Portal options, refer to the *Navigate the Supplier Portal* job aid.

Supplier Change Request



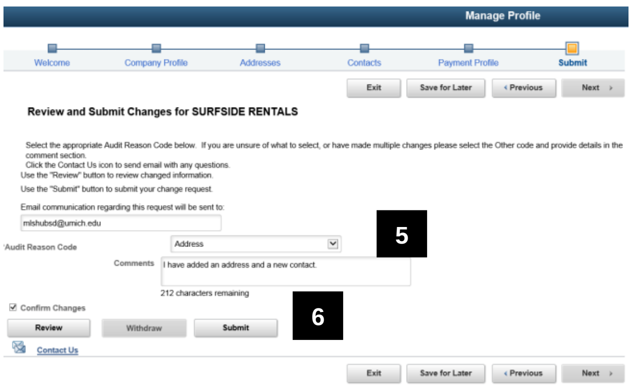
2. Click Supplier Change Request.

Request Screen

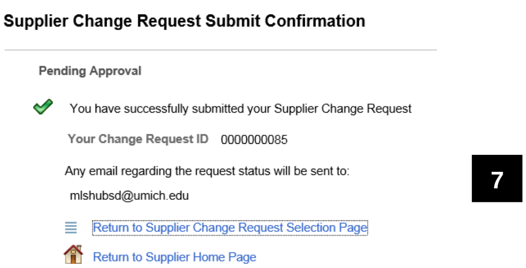


3. From the request screen you may update your company profile, addresses, contacts, and your payment profile. Whether you choose to modify an address or all of the above, you must be sure to submit your requested changes for your supplier profile.
4. To navigate you may utilize the Next button at the bottom of the page, or you may click directly on the item that you would like to review or update.

Review and Submit Changes

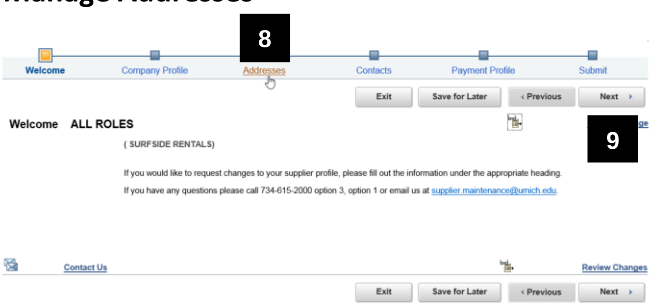


5. To submit your changes you will be required to select the audit reason code from a drop down list of options:
   - Address
   - Contact Information
   - Name Change
   - Other or Multiple Changes
   - Payment
6. You should also add a comment explaining your requested changes, and check Confirm Changes, then click the submit button.



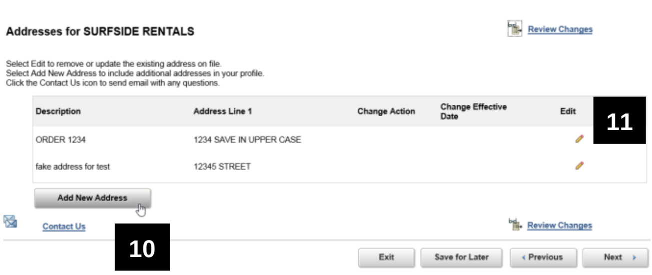
7. You will receive a confirmation screen after properly submitting a change request.

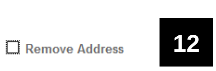
Manage Addresses



8. To manage addresses, you may click Addresses in the tool bar.
9. You may also advance to the addresses page by clicking Next until you reach the appropriate page.

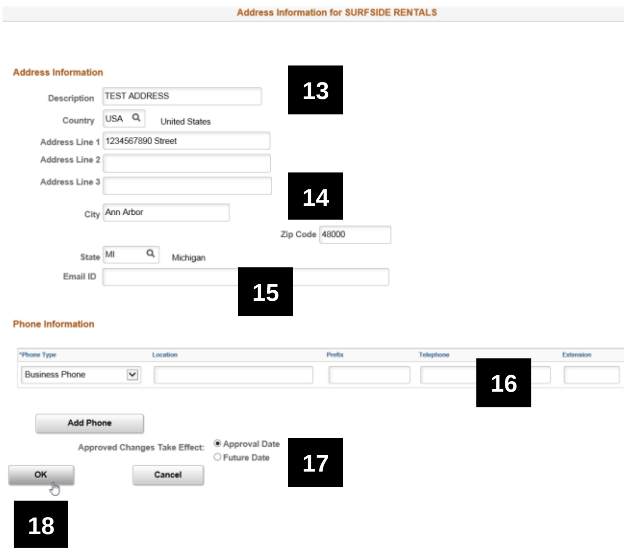
Add or Edit Addresses





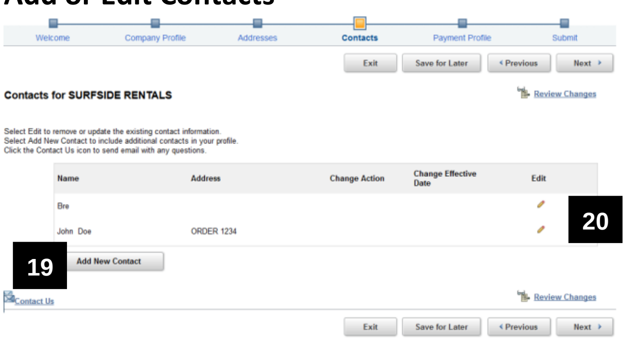
10. You may add a new address by clicking the Add New Address button.
11. To edit an existing address, click the little pencil icon for the appropriate line. (Please only use edit address for typos)
12. To remove an existing address, click the little pencil icon to view the address. Then check the Remove Address check box in the upper left corner, and click **OK**.

Address Information



13. In the **Description** box, enter an address description.
14. In the **Country, Address 1**, **Address 2**, **Address 3**, **City**, **State**, and **Zip Code** boxes, enter the appropriate address information. (Country must be USA)
15. In the **Email ID** box, enter an email address (optional).
16. In the **Phone Information** table, enter a business phone number. Click **Add Phone** to enter additional phone numbers.
17. Please note that you may designate an address change to take effect on the approval date or a specified future date by selecting the appropriate radio button.
18. Click **OK** when you are done.

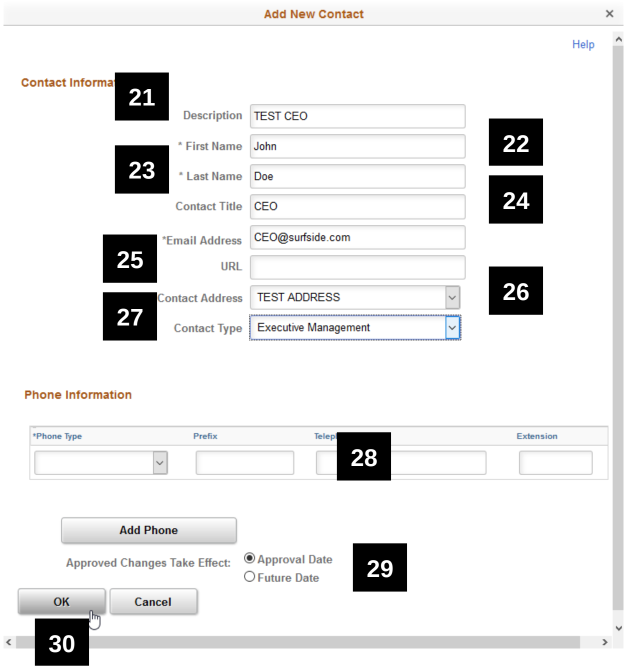
Add or Edit Contacts



19. After navigating to contacts, you may add a new contact by clicking the Add New Contact button.
20. To edit an existing contact, click the little pencil icon for the appropriate line.

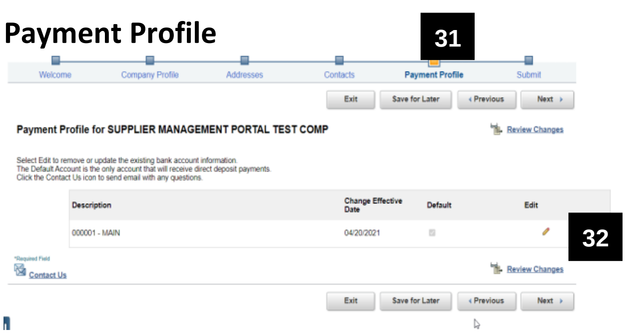
To remove an existing contact, click the little pencil icon to view the contact (not shown). Then check the Remove Contact check box in the upper left corner, and click **OK**. ☐ Remove Contact

Contact Information

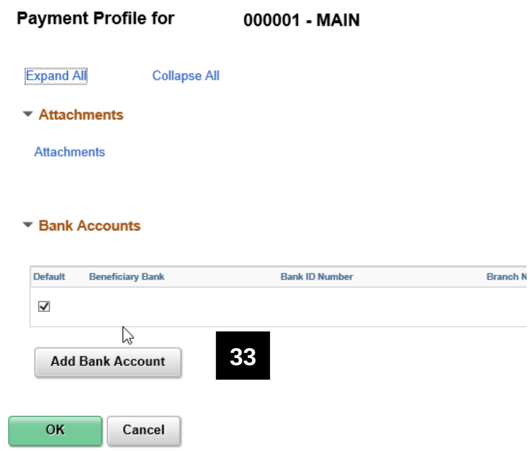


21. In the **Description** box, type a contact description (optional).
22. In the **First Name** box, type the contact's first name.
23. In the **Last Name** box, type the contact's last name.
24. In the **Contact Title** box, type the contact's official title. (optional)
25. In the **Email ID** and **URL** boxes, type an email address and URL (optional).
26. Select the appropriate **Contact Address** from the drop-down box. (optional)
27. Select the appropriate **Contact Type** from the drop-down box. (optional)
28. In the **Phone Information** table, enter a business phone number. Click **Add Phone** to enter additional phone numbers.
29. Please note that you may designate a contact change to take effect on the approval date or a specified future date by selecting the appropriate radio button.
30. Click **OK** when you are done.

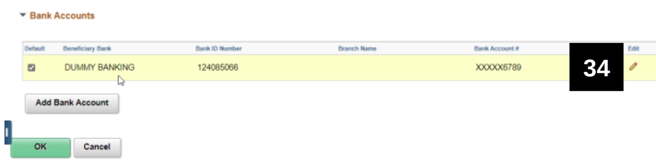
Payment Profile



31. After navigating to Payment Profile, you can manage banking information.
32. To add or modify banking information, click on pencil icon



33. To add banking info, click on Add Bank Account



34. If Bank Account exists, click on pencil icon to make changes

    NOTE: There can only be one bank account on file so if one exists, please edit the current information.

    Please go back up to step 5 to see steps for reviewing and submitting change request.