Supplier Profile

Supplier Portal – Quick Reference Sheet

Overview

This Quick Reference Sheet (QRS) demonstrates how to access, view or change your company details; delete current users that have left your company; create new users and upload documents that are used regularly during the bidding process.

Things You Need To Know

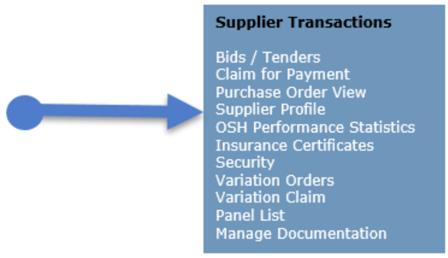
- It is important to note that all communication is sent via email, this includes purchase orders, bid invitations, requests for OSH and Insurance details.
- Updates to users are not instantaneous and require technical intervention. A new user may take up to 48 hours to be created due to security protocols.

Features Covered

- View company details
- Delete an existing user
- Create a new user
- Add capability documents

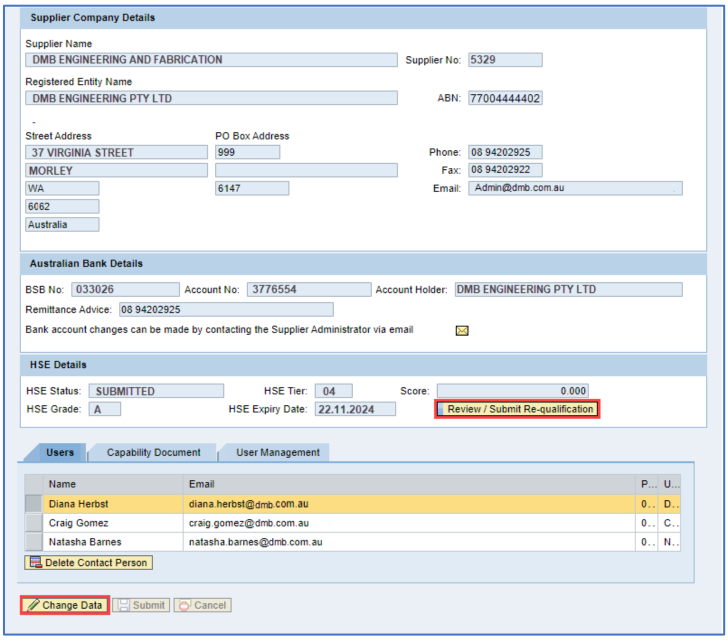
View company details

1. Click menu item **Supplier Profile**.



The **Supplier Profile** transaction appears and displays:

- Company details
- Bank details
- HSE details
- User details



2. Click **Review/Submit Re-qualification** button to review current HSE details or submit a re-qualification.
3. To change bank account and remittance advice information:
   - Click the email icon located in the Australian Bank Details section.
   - Add the new account and remittance advice details to the email and click send.

Note: Updating of bank account details will take a couple of days to complete due to security protocols.

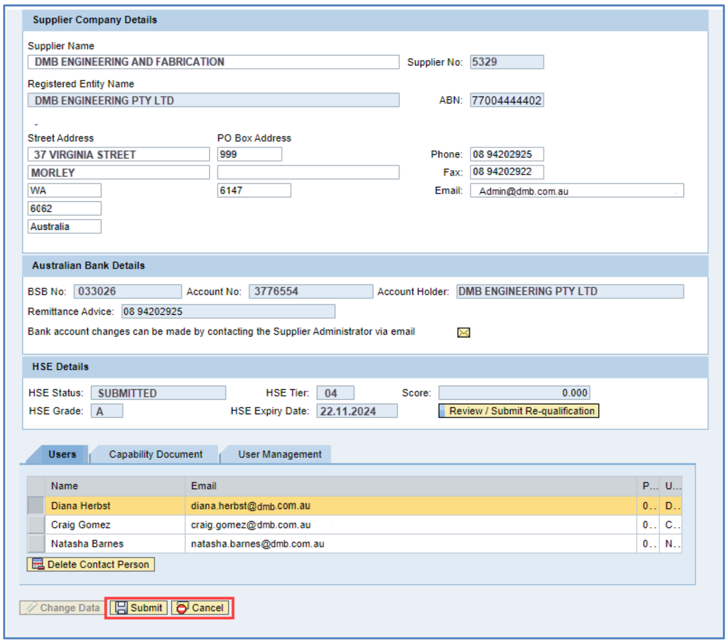
4. To make changes to the profile click **Change Data**.

   The screen changes to **Edit** mode.

   Note: Shaded fields are not editable.

5. Make the relevant changes to the required fields.
6. Click either:
   - **Cancel** if changes are not required, or
   - **Submit** to save the changes.

   Note: These changes update immediately.



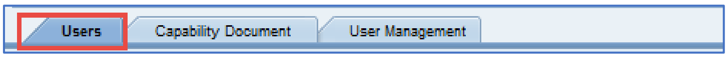
Delete an existing user

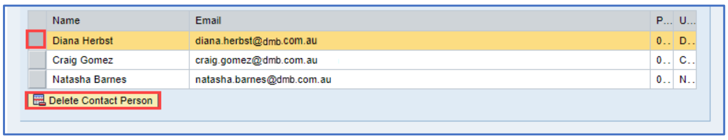
The **Users** tab contains the contact details and log on IDs of your registered users. When a staff member leaves your company, you must remove their access from your profile.

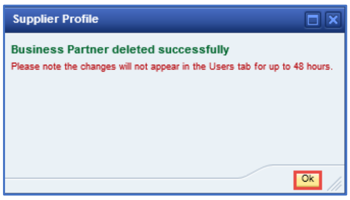
1. Click the **Users** tab.
2. Click ☐ next to the person to be removed.
3. Once highlighted, click **Delete Contact Person**.

   A message appears advising that the request was sent to the help desk.

   The Supplier Profile window displays advising the changes will not appear in the users tab for up to 48 hours.
4. Click **OK**.







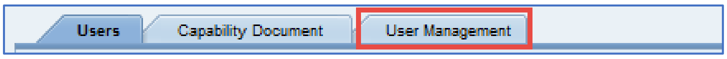
Create a new user

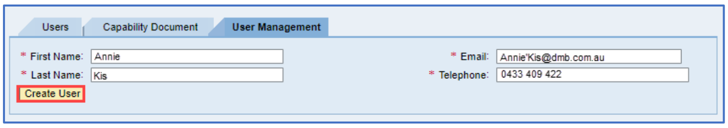
Creating a new user is performed through the **User Management** tab.

1. Click the **User Management** tab.
2. Complete all the details.
3. Click **Create User**.

   A message appears advising the **Business Partner** was created.

   Note: New user creation will take a couple of days to complete due to security protocols.





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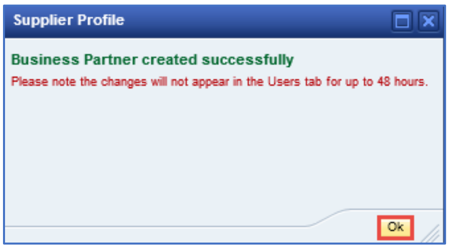
The Supplier Profile window displays advising the changes will not appear in the users tab for up to 48 hours.

4. Click **OK**.

   The new user will receive their **user ID** and **password** via email.

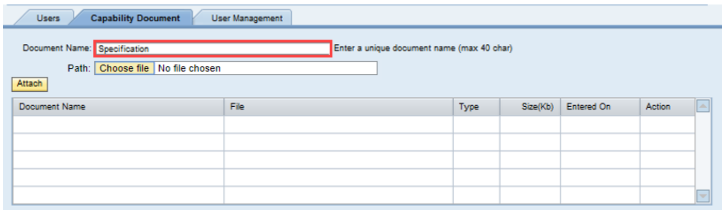


Add capability documents

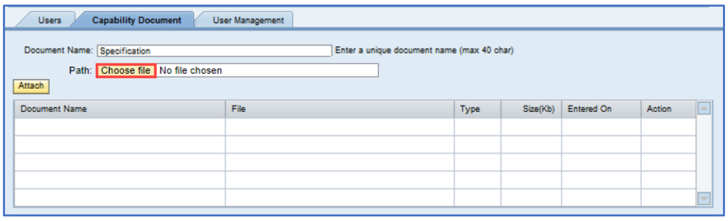
This functionality allows you to upload documents that are used regularly during the bidding process and copy relevant documents into your bid during bid preparation.

1. Click **Capability Document** tab.

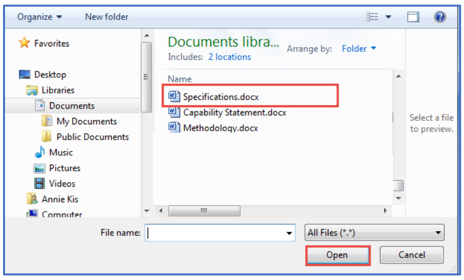
2. Enter the **Document Name**.



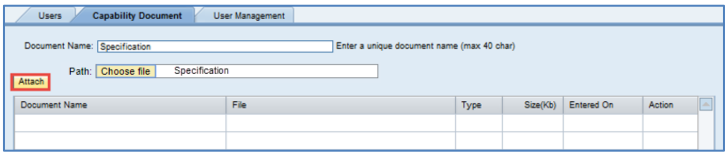
3. Click **Choose file**.



4. Locate and select the document.
5. Click **Open**.



6. Click **Attach**.



The newly attached document appears in the table and you can repeat this process for further document additions.