Quick Guide 5: iSupplier Profile

iSupplier Portal

iSupplier Portal Changes

The supplier can make changes to:

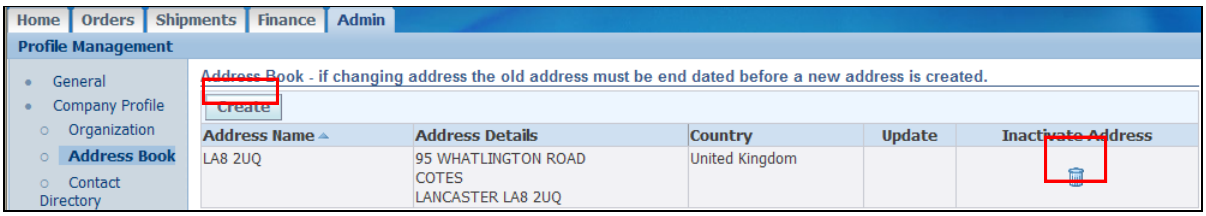
- General Company Information,
- CPV Codes,
- Address Book,
- Contact Directory,
- Business Classification,
- Banking Details.

With the exception of General Company Information and CPV Codes, all supplier changes must be approved by the authority. The supplier is notified when approval is given.

Address Book

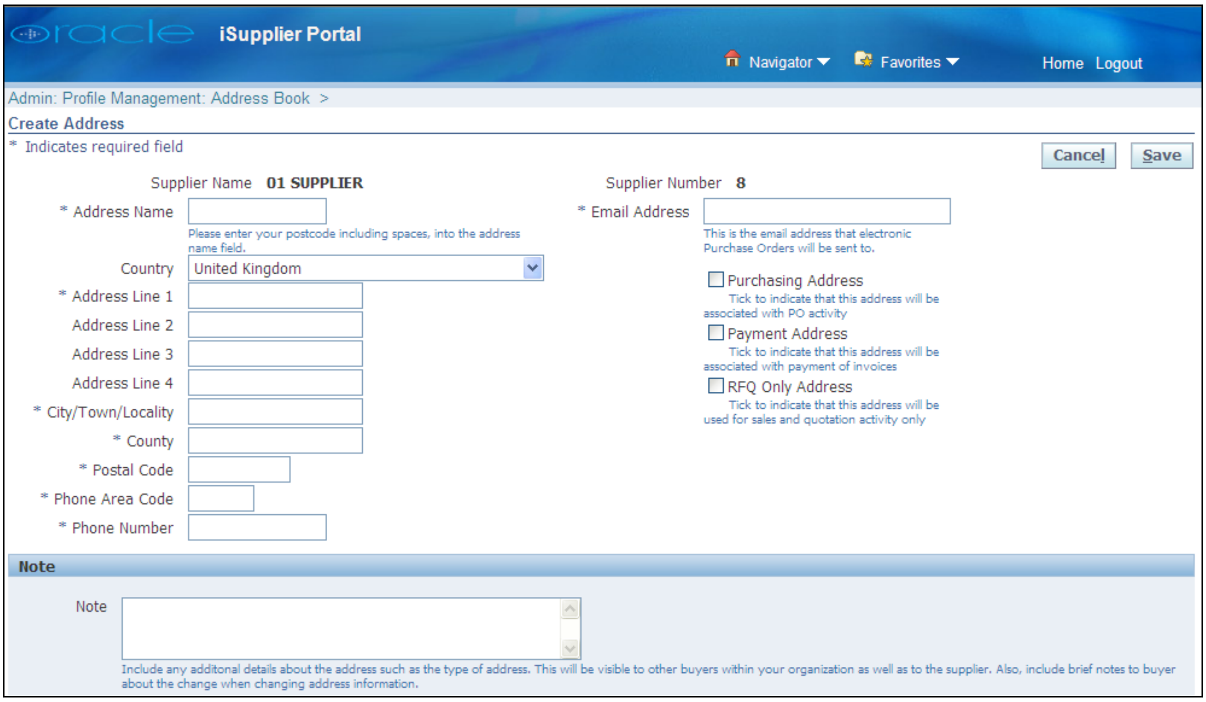
Click the 'Admin' link and then the 'Address Book' link.

- You can Create or Inactivate an Address.



Create Address: to add a new address, instead of, or in addition to, the existing address.

- Click the 'Create' button;
- Address Name; enter the Post Code;
- Note: a star (*) identifies a mandatory field;
- Enter the new address and phone number.



- Enter the email address used for purchase orders in 'Email Address';
- Use the tick boxes to identify if this address is used for purchasing and / or payment, or just for quotes;
  - o You must have at least one purchasing and one payment address, although these can be the same;
- Add additional relevant information in the 'Note' box;
- Click the 'Save' button
- Check the confirmation message is displayed.

Each supplier address has a bank account and at least one contact associated with it:

- **Contact Directory/Manage Address**: ensure you add at least one contact for this address.
  - This will enable the named contact to view the purchase orders and raise invoices etc for the new address details on the portal.

- **Banking Details**: Add the bank account to be used for this address.
  - This will enable payments to be made for orders from the new address.

Inactivate Address: to delete an address no longer used.

- Click the 'Remove' button against the relevant line;
- Acknowledge the warning;
- Check the confirmation message is displayed.
- Please ensure you have at least one active address at all times.

Change of Address:

- Create the new address, as above;
- Inactivate the previous address, as above;
- Add the address of at least one contact, or create a new contact if applicable, as below;
- Add the address to the bank details, or create new bank details if applicable, as below.

Contact Directory

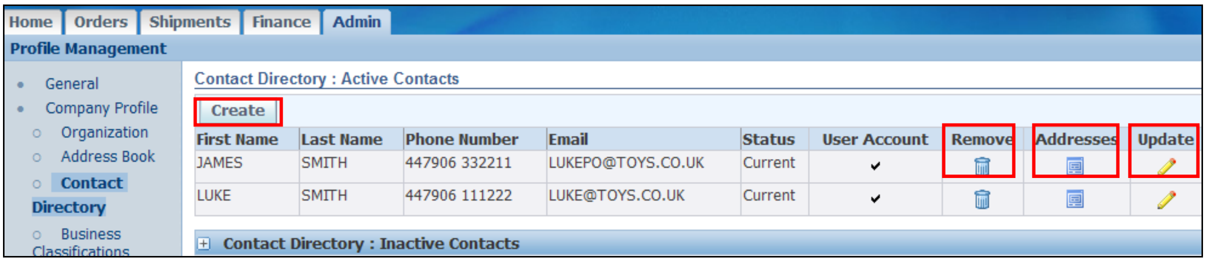
- Click the Admin link and then the Contact Directory link.

- Please ensure all contacts and their email addresses are accurate and up to date.

- If the contact has access to the iSupplier Portal, it is the supplier's responsibility to remove contacts if they leave your employment or no longer require access.

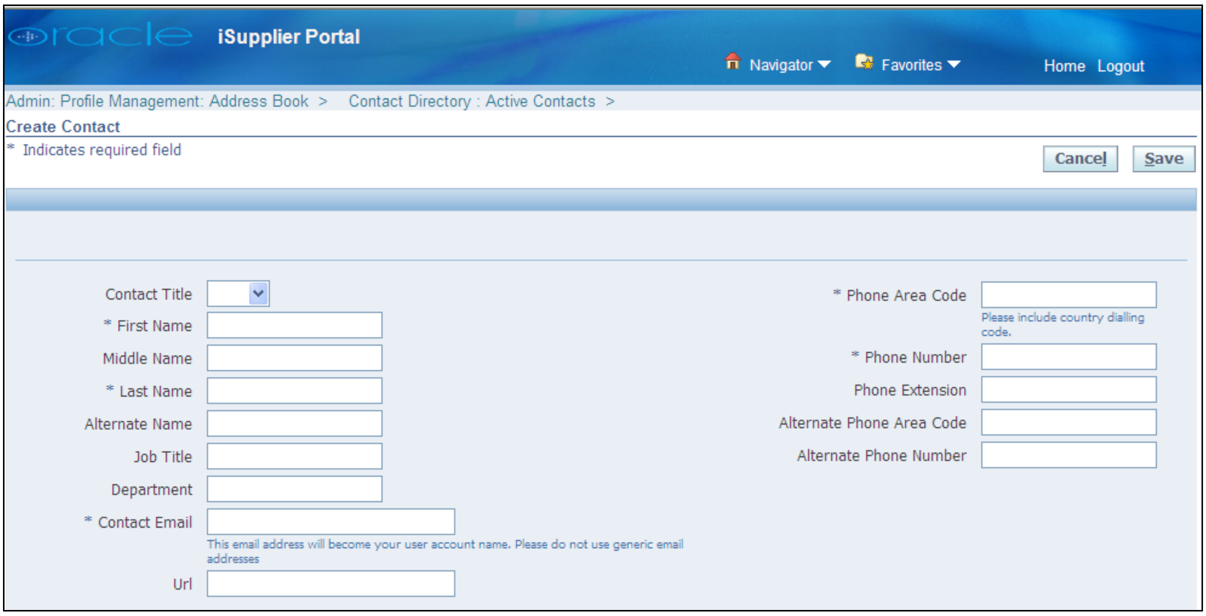
- Contacts must be associated with the organisation's address(es) to enable access to the portal.

- You can Create, Update, Remove or manage Addresses for a contact.

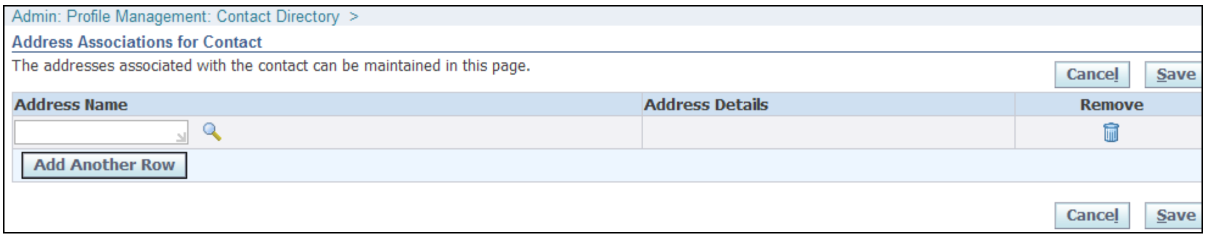


Create Contact: To add a new contact. Please note: When a new contact is added, access to the portal will be given. If this is not required, please inform the authority after the contact is set up.

- Click the 'Create' button;
- Enter the contact details including their email address; this will become their username;

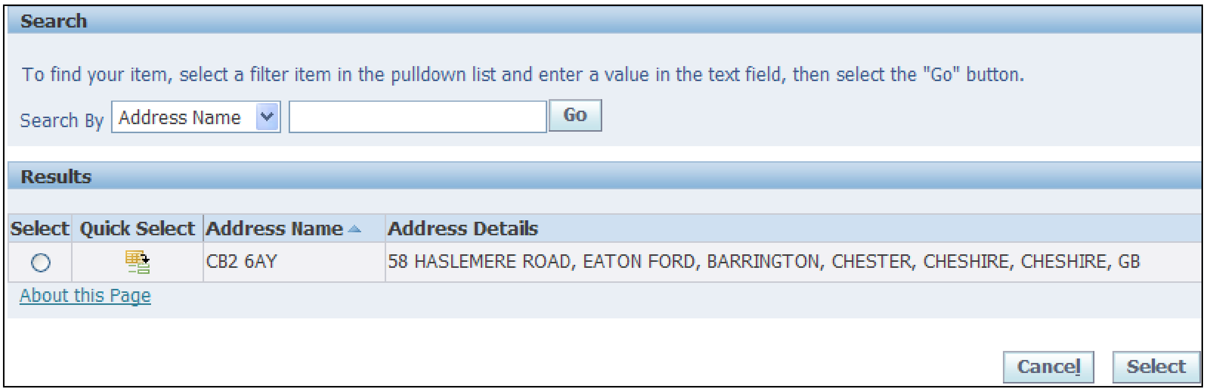


- Click the 'Save' button;
- Check the confirmation message is displayed.
- Click the 'Manage Address' button against the relevant line to notify the authority of your organisation's address(es) for which this person is a contact;
- Click 'Add Another Row' (your organisation's address is set up but needs to be added to the contact);



- Click the 'Search' icon (magnifying glass);
- Click the 'Go' button to search for all addresses set up for the supplier;
- Click 'Quick Select' for the relevant address this person;

Create Contact: (cont.)



- Repeat the procedure if this person is a contact for more than one address
- Click the 'Save' button;
- Check the confirmation message is displayed.

Update Contact: update or amend details of an existing contact.

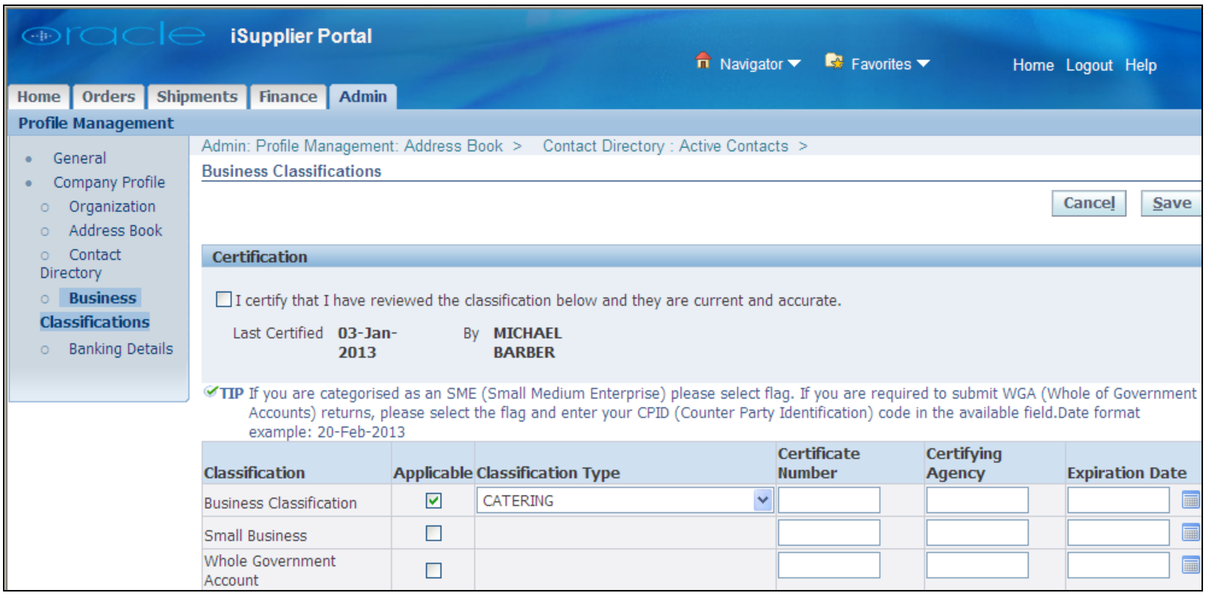
- Click the 'Update' icon against the relevant line;
- The existing contact details will be displayed.
- Make the changes required. Check the email address is accurate – if you forget your password, you will be issued with a temporary password via this email address;
- Click the 'Save' button;
- Check the confirmation message is displayed.

Remove Contact: to remove a listed contact.

- This will end access to the portal.
- Check that you are removing the correct contact; you will not receive a warning;
- Click the 'Remove' button against the appropriate line;
- Check the confirmation message is displayed.

Business Classification

- Click the 'Admin' link and then the 'Business Classification' link.
    - Select classifications as appropriate, e.g. click on the 'Supplier Classification' drop down list to enter or amend your classification;
    - Ensure you tick the applicable box next to any classifications added or amended;



- If you have made any changes, tick the certification box above;
- Click the 'Save' button;
- The certification shows this was last updated today and your name is displayed.

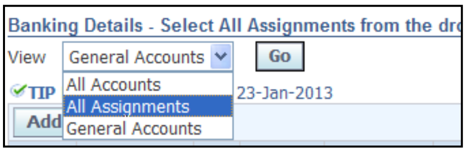
Banking Details

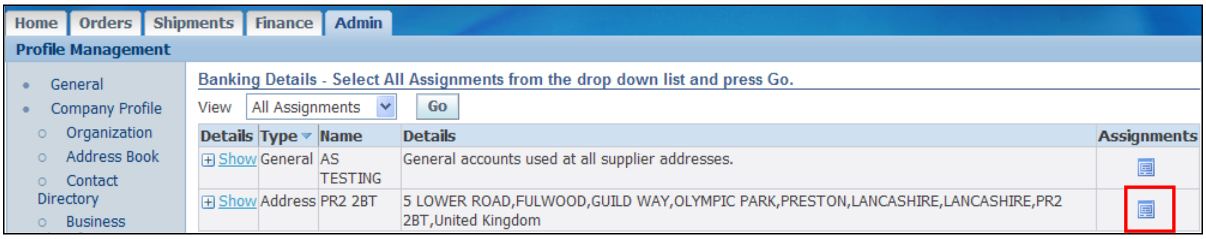
Click the 'Admin' link and then the 'Banking Details' link.

Ensure the details you input are correct; your payments will be made into the account entered.

Create an Account: to change or correct the account held.

- Select 'All Assignments' from the 'View' drop down list;
- Click the 'Go' button;





- Click the 'Assignments' button against the relevant address;

- Click the 'Create' button 

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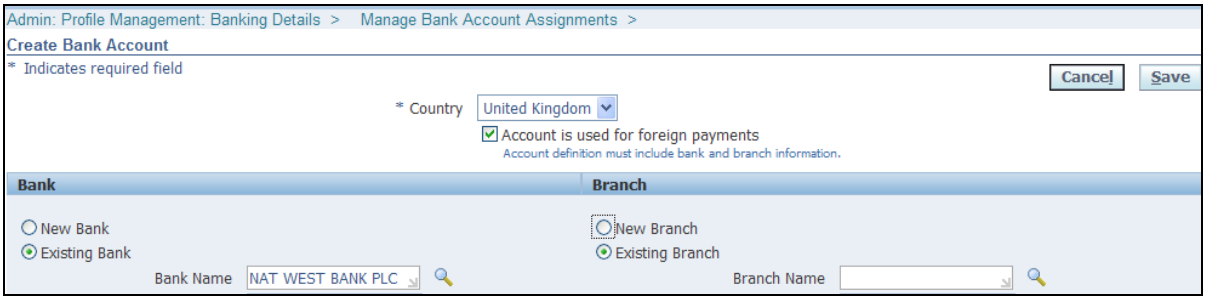


- Click the 'Existing Account' radio button ;
- Click in the magnifying glass next to 'Bank Name';
- Enter the start of the name of the bank and click 'Go' to start the search;
- Click the 'Quick Select' button next to the relevant bank details;

- Click the 'Existing Branch' radio button ;
- Click in the magnifying glass next to 'Branch Name';
- The search defaults to 'Branch Name' – enter the branch name or use the drop down list to change to 'Sort Code';
- Enter the branch name or the sort code as applicable and click 'Go';
- Click the 'Quick Select' button next to the relevant branch details;

- Enter the 8 digit bank account number in the 'Account Number' field;
- Enter the account holder name in the 'Account Name' field;
- Enter roll numbers (if applicable) and any other relevant information (e.g. date which the new account is to be used from) into the 'Note to Buyer' field;

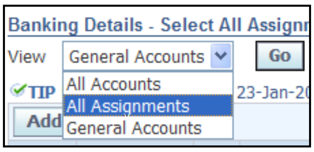
- Click the 'Save' button;

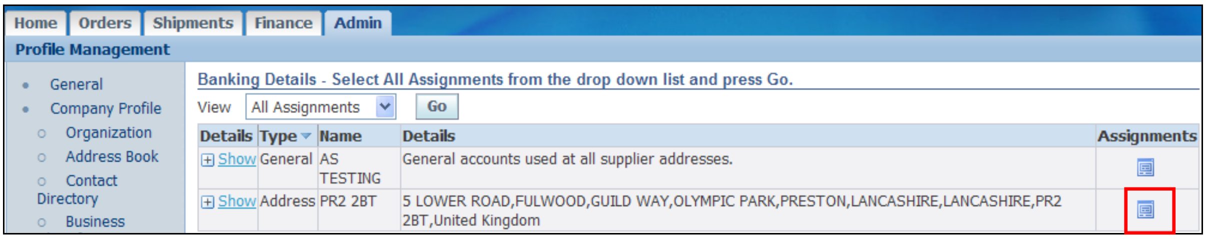
- Check the confirmation message is displayed.

Add an Account:

Bank details are associated with the organisation's address. 'Add' allows you to add bank details held for one address to another. This may be used if you have multiple addresses but only one bank account, or if you change your address but the bank details remain the same.

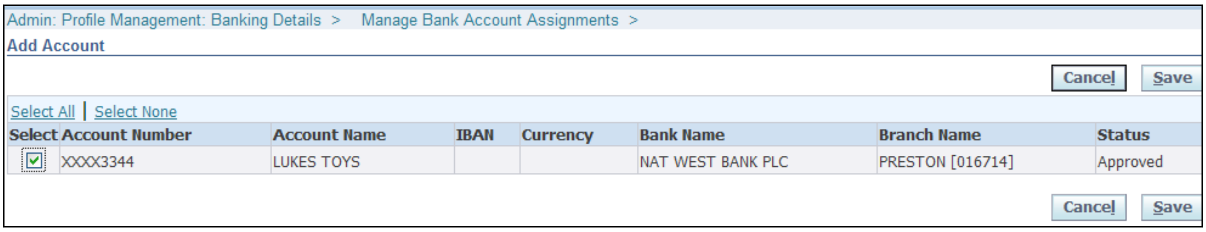
- Select 'All Assignments' from the 'View' drop down list;
- Click the 'Go' button;





- Click the 'Assignments' button against the relevant address;

- Click the 'Add' button Add ;
    - Bank details are set up for your organisation, but are not yet associated with this address;



- Tick to select the bank account to be used;
- Click the 'Save' button;
- Check the confirmation message is displayed.

If you need further assistance please email the following address with your query: isupplierqueries@lancashire.gov.uk.