

School District of Philadelphia Supplier Portal

Add a Contact

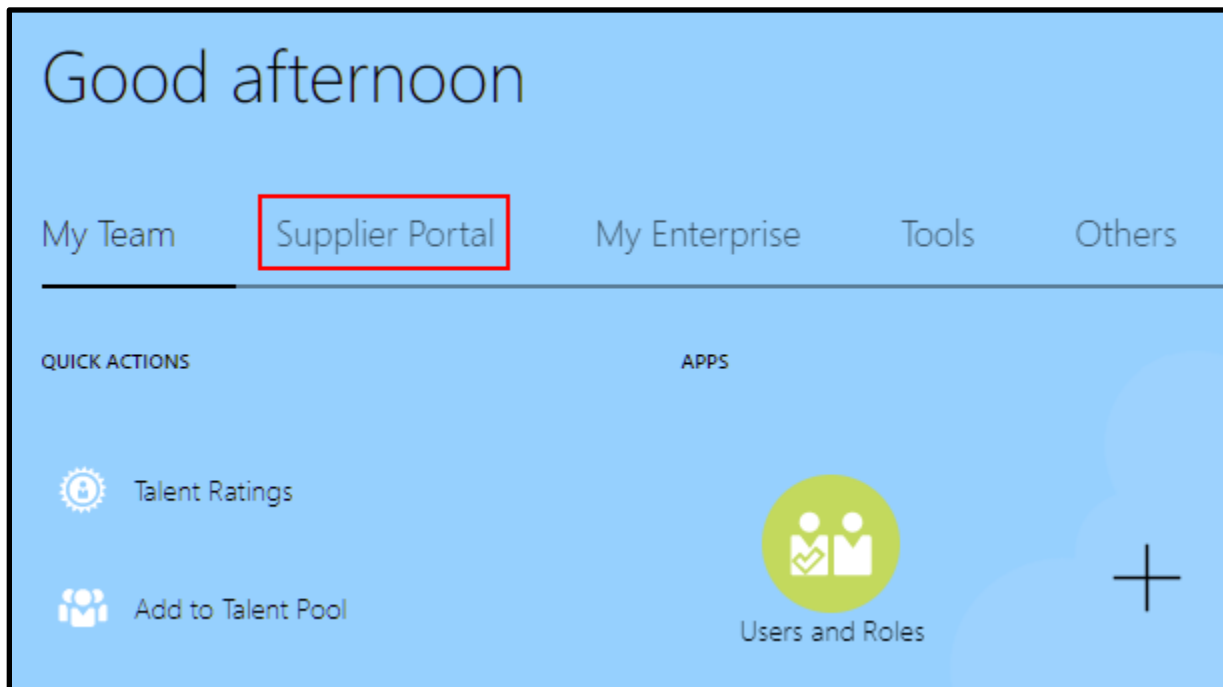
Guidelines

Contacts within the ERP system are able to be assigned roles that can help with the administration of duties within the supplier Portal. Adding a contact allows individuals listed to be added as Signers on a Contract by SDP Contract Administrators.

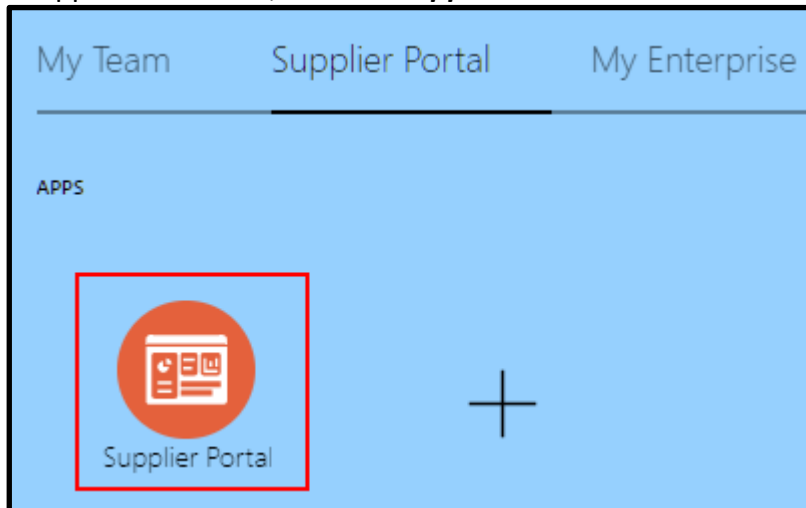
- Roles and administrative functions are added and managed on an individual basis and can correspond to job duties.
- Adding the proper contact is pivotal in the Contract Approval process as a member of your organization is required to sign all SDP issued contracts and contacts listed in your profile can be added as signers by SDP Contract Administrators.
- If you do not have an ERP Account and believe you should, reach out to oraclesupplier@philasd.org for assistance.
- Do not forget to **Review and Submit** your changes as that is the number one reason for changes not being processed in a timely manner.

Navigation

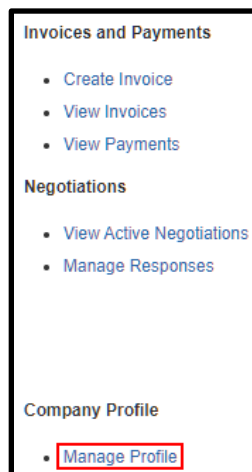
1. While on the Springboard, click the **Supplier Portal** tab.



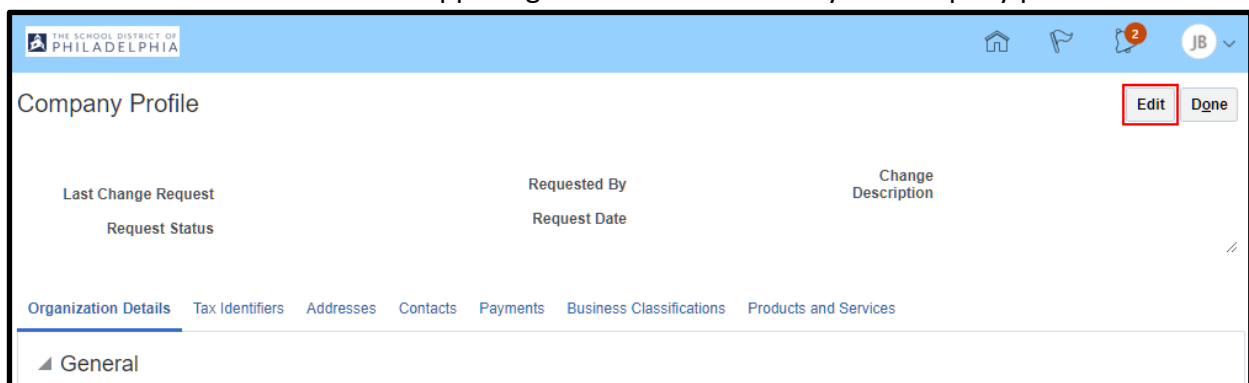
2. While on the Supplier Portal Tab, click the **Supplier Portal icon**.



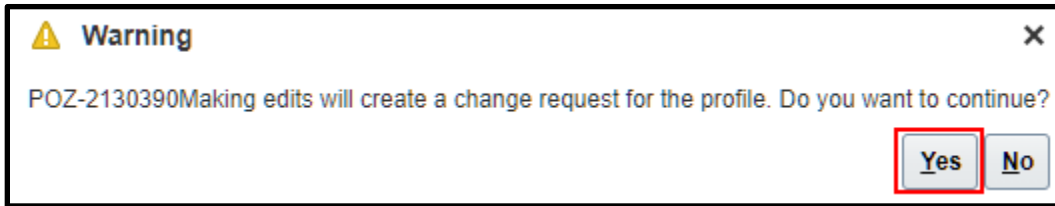
3. When the Supplier Portal has loaded, click on the **Manage Profile link** in the Tasks Pane on the left hand side of the screen.



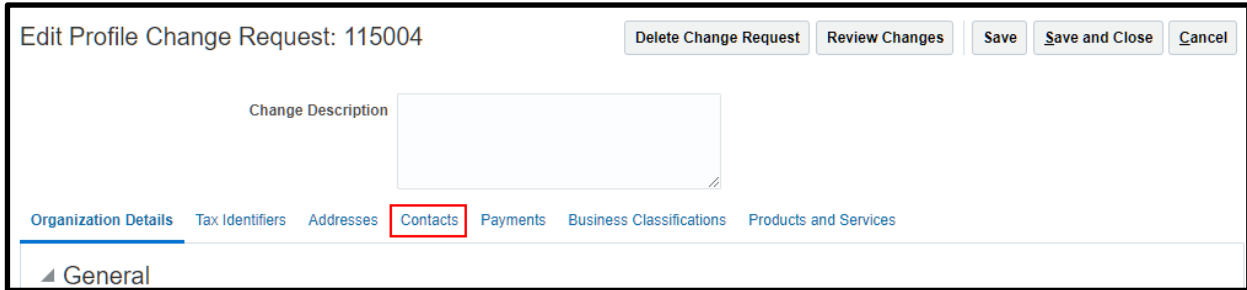
4. Click the **Edit button** in the upper righthand corner to edit your company profile.



- The following Warning message will display. If you are trying to make a change, click the **Yes button** to continue.



- Click the **Contacts Tab** to manage the contacts on your profile.



- Type a description of the change in the **Change Description box**.

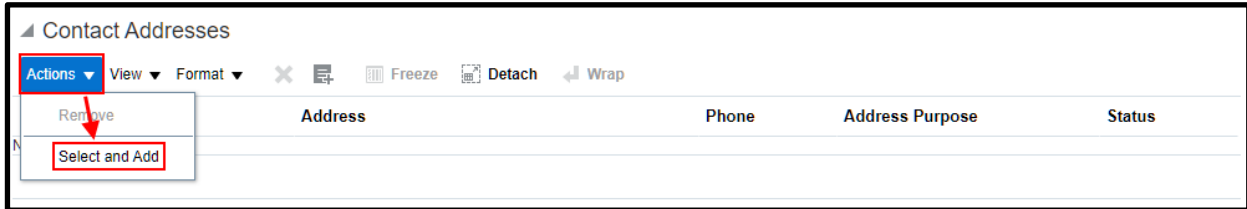
8. Click the **Plus icon** to add a contact.

9. Fill out the required information to create the contact.

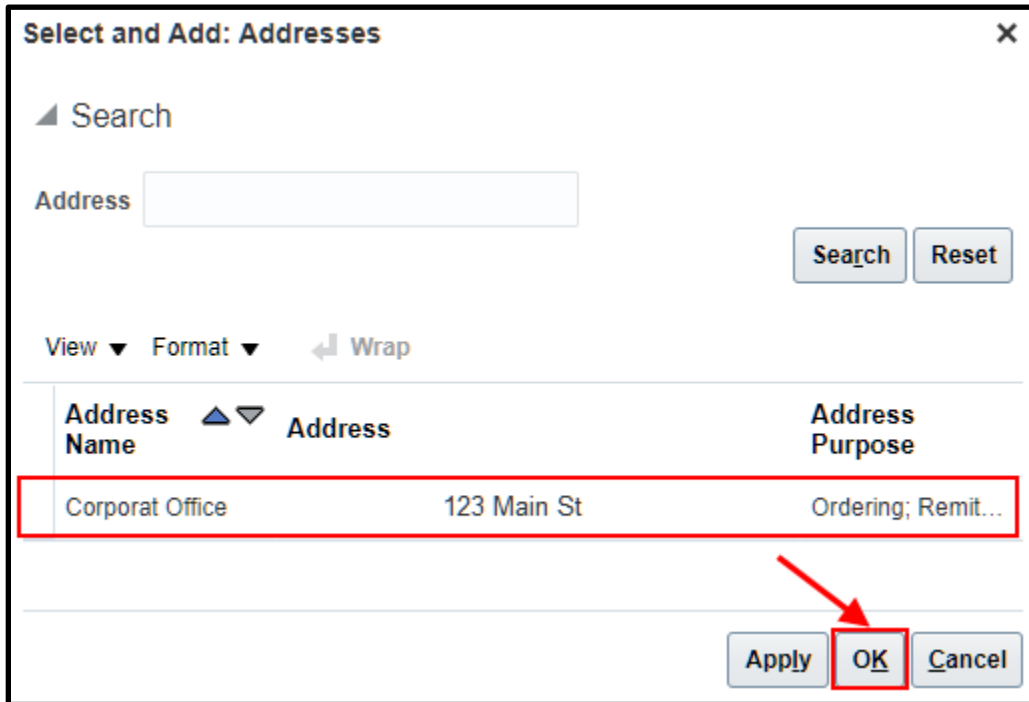
NOTE: The information highlighted in the above image is only the minimum required information, you may fill out all relevant information for your contact as your organization deems appropriate.

- a. Checking the **Administrative Contact box** allows the user to make administrative changes to the Supplier Profile in the ERP system on behalf of your organization. As such, it is highly discouraged that you have too many users with this privilege so as to prevent erroneous changes to your organization's information.
- b. While **Job Title** is not a required field, it is highly encouraged that you fill out this information to better allow both SDP and your staff to identify individuals within your organization.

- i. Additionally, if the contact being added will be signing contracts, then **SDP requires you to fill in this optional field.**
10. Under the Contact Addresses section, click the ***Actions drop down***, then click ***Select and Add*** to add a contact Address.



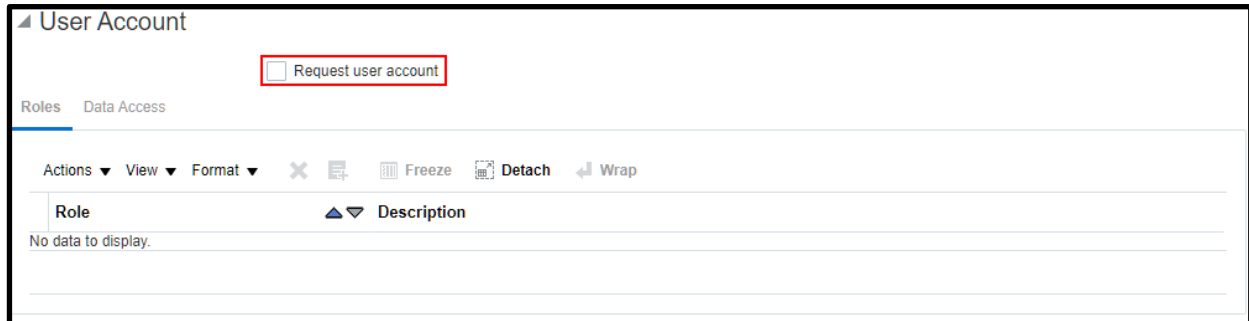
11. Select the correct address from your listing, then click the **OK** button.



NOTE: The addresses available are based on those entered into the system by your organization as part of your Supplier Profile.

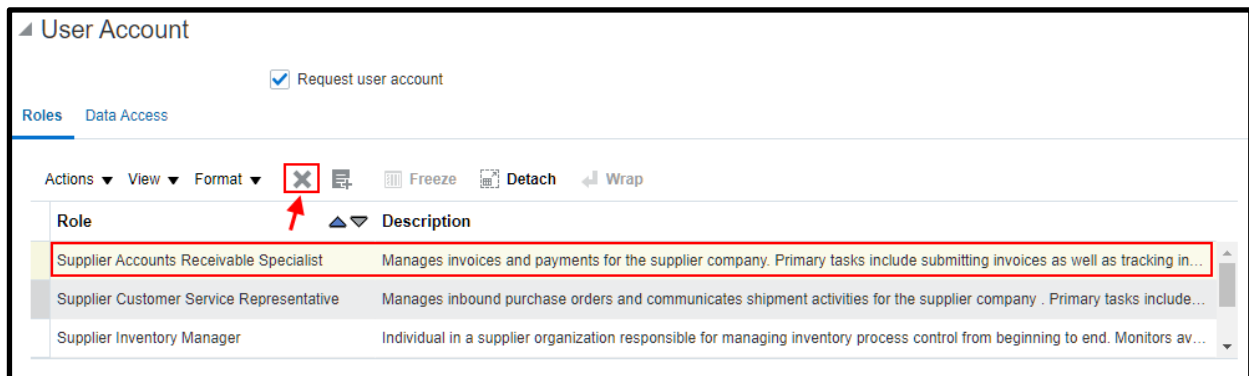
- a. You may also repeat these steps to associate a user with more than one address in your organization should it be necessary.

12. You may add a User Account if deemed necessary by your organization. User accounts allow individuals to log into the ERP and manage certain aspects of the Supplier Portal in accordance with the roles added.



To do so do the following:

- a. Check the **Request user account** checkbox.
- b. Adjust the roles as deemed necessary by your organization. Each Role has a description to help with determining which of the roles to leave assigned for your user.
 - i. To remove a role, click the **role** to highlight it, then click the **X** Icon to



remove the role.

13. When satisfied with the information you have entered, click the **OK** button.

Create Contact
✕

Salutation ▼

* First Name John

Middle Name

* Last Name Doe

Job Title

Administrative contact

* Phone 1 ▼ 555 5555

Mobile ▼

Fax ▼

* Email mail@mail.com

Status Active ▼

▲ Contact Addresses

Actions ▼ View ▼ Format ▼ ✕ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Corporat Office			Ordering; Remit to; RFQ or Bidding	Active

Columns Hidden 5

▲ User Account

Request user account

Roles Data Access

Actions ▼ View ▼ Format ▼ ✕ Freeze Detach Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include...
Supplier Inventory Manager	Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors av...

Create Another OK Cancel

NOTE: You may click the **Create Another** button to add multiple contacts.

Edit Profile Change Request: 115004
Delete Change Request Review Changes Save Save and Close Cancel

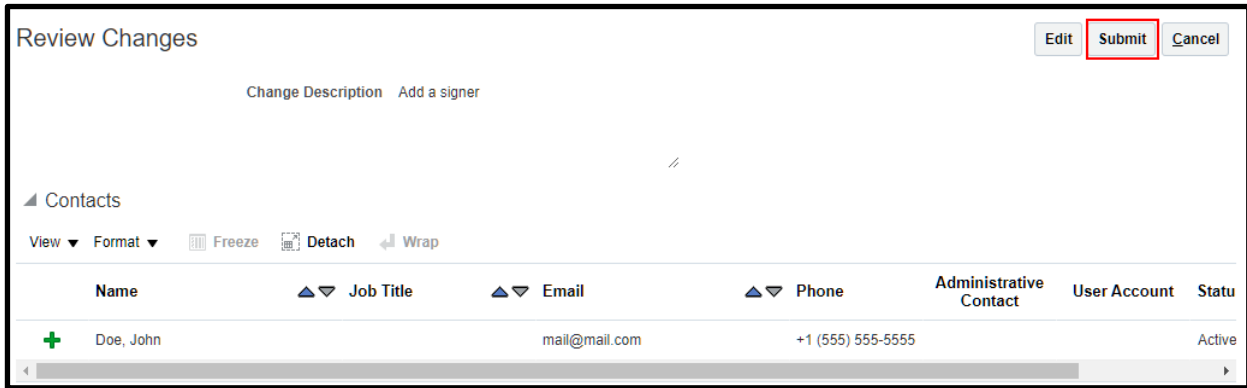
Change Description Add a signer

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

Actions ▼ View ▼ Format ▼ + ✕ Status Active ▼ Freeze Detach Wrap

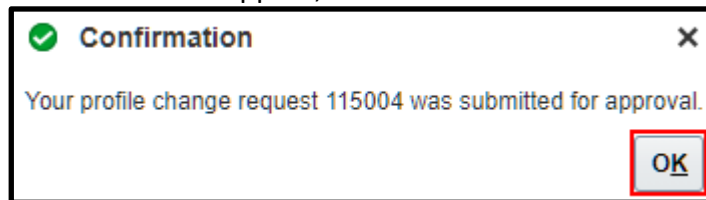
Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Doe, John		mail@mail.com	+1 (555) 555-5555			Active

14. Click the **Review Changes** button.

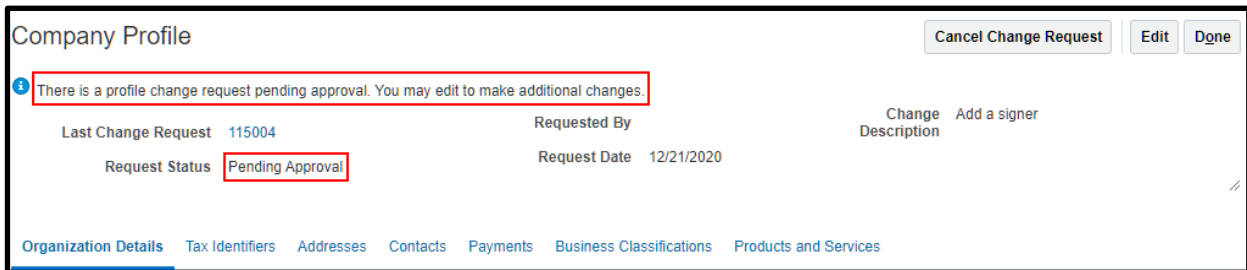


15. Verify that all the changes you made appear properly, then click the **Submit Button**.

16. The confirmation statement will appear, click **OK**.



17. Your change request information will display at the top of your Company Profile. Once it



has been approved by SDP Supplier Administrators the status will update to approved.

NOTE: For questions about the status of a change request reach out to oraclesupplier@philasd.org for assistance.