



## **CPS Supplier Portal 05 - Self-Service "Admin"**

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## CPS Supplier Portal 05 - Self-Service "Admin"

### Introduction

Self-service "Admin" functionality allows users to manage supplier related information. The following functionality is available to all supplier users with **Admin** tab:

- View General Information
- Update PO Delivery Method
- Update Organization Information
- Update Contact Directory

### Prerequisites

- Supplier user should have access to the portal

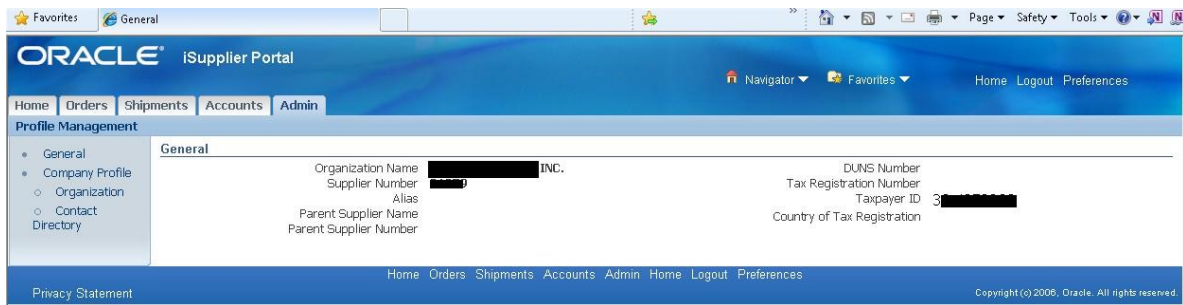
### Navigation

CPS iSupplier Portal View Only (Supplier Access) → Home Page → Admin (Tab)

### General

This is the default page that will be displayed in the Admin tab is the "General" page. This page displays the below information:

- Organization Name or Supplier Name
- Supplier Number
- Tax Payer ID
- Other information as available



The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. The 'Admin' tab is selected, and the 'Profile Management' section is active. The 'General' sub-tab is selected, displaying the following information:

Organization Name	[REDACTED] INC.	DUNS Number	
Supplier Number	[REDACTED]	Tax Registration Number	
Alias		Taxpayer ID	[REDACTED]
Parent Supplier Name		Country of Tax Registration	
Parent Supplier Number			

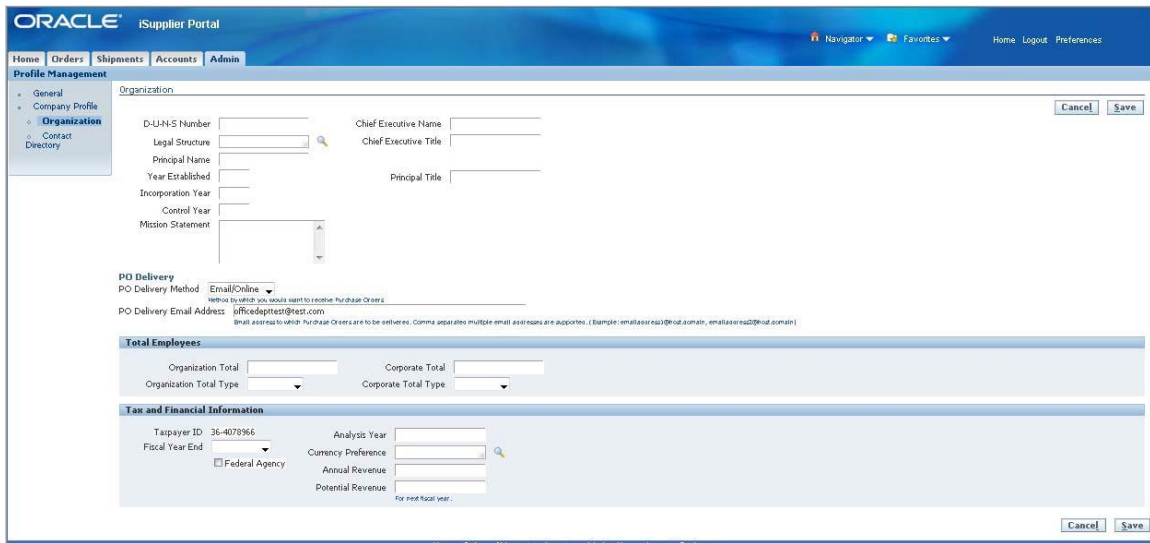
The footer of the page includes 'Privacy Statement', 'Home Orders Shipments Accounts Admin Home Logout Preferences', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Changes to the information available on this page **MUST** be accompanied by an updated W9 form.

### Company Profile - Organization

Organization page contains four (4) different sections as below:

- Organization – General information about your company
- PO Delivery – Method by which your company wishes to receive purchase orders
- Total Employees – Employee related information about your company
- Tax and Financial Information



The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. The 'Admin' section is expanded to show 'Profile Management', which includes 'General', 'Company Profile', 'Organization', 'Contract', and 'Directory'. The 'Organization' section is active and contains the following fields:

- Organization Section:**
  - D-U-N-S Number: [Text Field]
  - Legal Structure: [Dropdown Menu]
  - Principal Name: [Text Field]
  - Year Established: [Text Field]
  - Incorporation Year: [Text Field]
  - Control Year: [Text Field]
  - Mission Statement: [Text Area]
  - Chief Executive Name: [Text Field]
  - Chief Executive Title: [Text Field]
  - Principal Title: [Text Field]
- PO Delivery Section:**
  - PO Delivery Method: [Dropdown Menu, currently set to 'Email/Online']
  - PO Delivery Email Address: [Text Field, currently set to 'officedeptest@nest.com']
- Total Employees Section:**
  - Organization Total: [Text Field]
  - Corporate Total: [Text Field]
  - Organization Total Type: [Dropdown Menu]
  - Corporate Total Type: [Dropdown Menu]
- Tax and Financial Information Section:**
  - Taxpayer ID: 36-4078966
  - Fiscal Year End: [Dropdown Menu]
  - Analysis Year: [Text Field]
  - Currency Preference: [Dropdown Menu]
  - Annual Revenue: [Text Field]
  - Potential Revenue: [Text Field]
  - For next fiscal year: [Text Field]
  - Federal Agency

Buttons for 'Cancel' and 'Save' are located at the top right and bottom right of the form area.

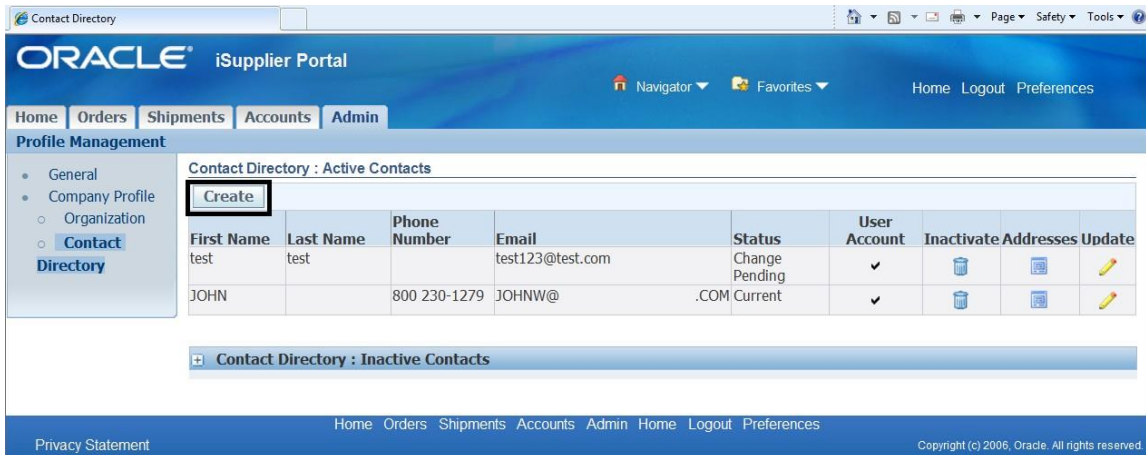
### Contact Directory

This is the default page that will be displayed in the Admin tab is the "General" page. This page displays the below information:

Contact Directory functionality allows the users to perform the below actions:

- Create a new contact (optionally request Portal access for the new contact)
- Update an existing contact
- Inactivate a contact

The below screen will be displayed when clicked on contact directory.



The screenshot displays the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. The 'Admin' tab is active. On the left, the 'Profile Management' sidebar has 'Contact Directory' selected. The main content area is titled 'Contact Directory : Active Contacts' and features a 'Create' button. Below this is a table with the following data:

First Name	Last Name	Phone Number	Email	Status	User Account	Inactivate	Addresses	Update
test	test		test123@test.com	Change Pending	✓			
JOHN		800 230-1279	JOHNW@.COM	Current	✓			

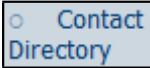
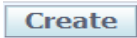
Below the table is a section for 'Contact Directory : Inactive Contacts'. The footer contains 'Privacy Statement', navigation links, and 'Copyright (c) 2006, Oracle. All rights reserved.'



## CPS Supplier Portal 05 - Self-Service "Admin"

### Create a New Contact

As a supplier user, you can create new contacts using the self-service functionality. Follow the below steps to add a new contact:

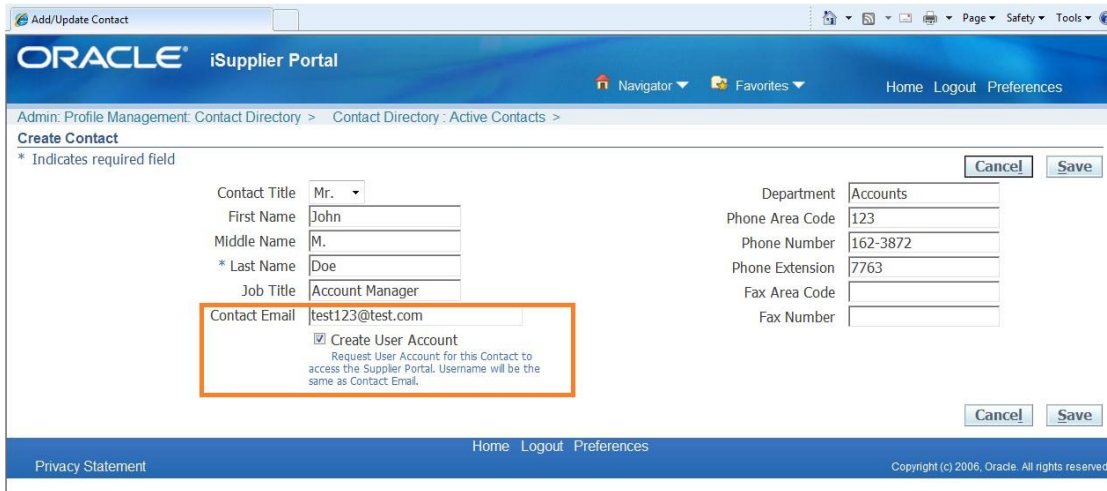
Step	Action
1.	Click on the <b>Contact Directory</b> hyperlink. 
2.	Click the <b>Create Button</b> . 
3.	You'll be redirected to the 'Create Contact' page
4.	Enter all applicable information into the applicable fields.  Note: Check ' <b>Create User Account</b> ' if you wish to create a login username for an individual in your organization  An auto generated message will be sent to your email as well as the newly requested user's account with a randomly generated password.

The following fields should be entered for new contacts:

- First Name, Last Name, Job Title
- Email Address, Phone

**Note:** the Job Title field is used to reflect the contact job title: i.e., Director, Vice President, Principal, Manager, Supervisor, etc.

## CPS Supplier Portal 05 - Self-Service "Admin"



Add/Update Contact

ORACLE<sup>®</sup> iSupplier Portal

Admin: Profile Management: Contact Directory > Contact Directory : Active Contacts >

**Create Contact**

\* Indicates required field

Contact Title: Mr. (dropdown)

First Name: John

Middle Name: M.

\* Last Name: Doe

Job Title: Account Manager

Contact Email: test123@test.com

Create User Account  
Request User Account for this Contact to access the Supplier Portal. Username will be the same as Contact Email.

Department: Accounts

Phone Area Code: 123

Phone Number: 162-3872

Phone Extension: 7763

Fax Area Code:

Fax Number:

Cancel Save

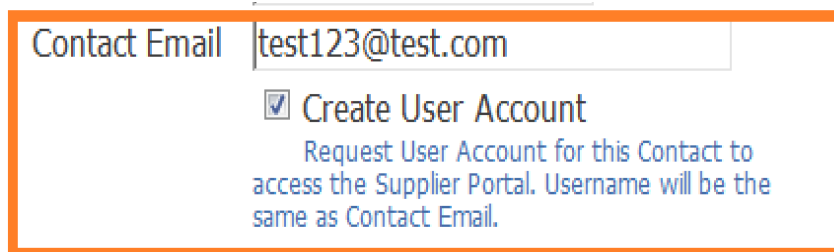
Home Logout Preferences

Privacy Statement

Copyright (c) 2006, Oracle. All rights reserved.

If the new contact is a person in your organization who needs access to the Supplier Portal, you can request to create a user account by selecting the "Check Box" above.

Once approved by CPS, the new contact will receive login credentials and a temporary password via email.




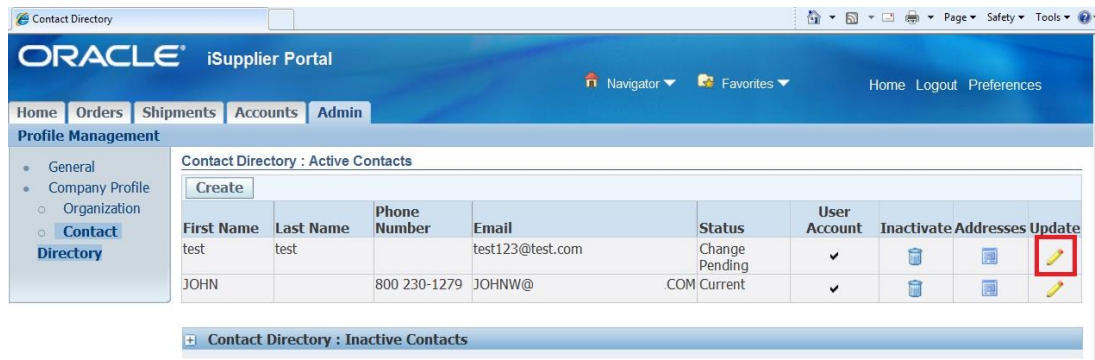
Contact Email: test123@test.com

Create User Account  
Request User Account for this Contact to access the Supplier Portal. Username will be the same as Contact Email.

### Update a Contact

Follow the below steps to update a contact:

Step	Action
1.	Click on the <b>Contact Directory</b> hyperlink.
2.	Click the <b>Update icon</b> . 
3.	You'll be redirected to the ' <b>Update Contact</b> ' page



The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. The 'Admin' section is expanded to show 'Profile Management', which includes 'General', 'Company Profile', 'Organization', and 'Contact Directory'. The 'Contact Directory' section is active, displaying a table of 'Active Contacts'. The table has columns for 'First Name', 'Last Name', 'Phone Number', 'Email', 'Status', 'User Account', 'Inactivate', 'Addresses', and 'Update'. The 'Update' column contains a yellow pencil icon, which is highlighted with a red box in the screenshot. Below the 'Active Contacts' table is a section for 'Inactive Contacts'.

First Name	Last Name	Phone Number	Email	Status	User Account	Inactivate	Addresses	Update
test	test		test123@test.com	Change Pending	✓			
JOHN		800 230-1279	JOHNW@	COM Current	✓			



Step	Action
4.	<p>Enter all applicable updates into the applicable fields.</p> <p><b>Note:</b> Check <b>'Create User Account'</b> if you wish to update the username. By updating the username you will effectively disable your previous username.</p>

Add/Update Contact

ORACLE iSupplier Portal

Admin: Profile Management: Contact Directory > Contact Directory : Active Contacts >

**Create Contact**

\* Indicates required field

Contact Title: Mr. (dropdown)

First Name: John

Middle Name: M.

\* Last Name: Doe

Job Title: Account Manager

Contact Email: test123@test.com

Create User Account  
Request User Account for this Contact to access the Supplier Portal. Username will be the same as Contact Email.

Department: Accounts

Phone Area Code: 123

Phone Number: 162-3872

Phone Extension: 7763

Fax Area Code: (empty)

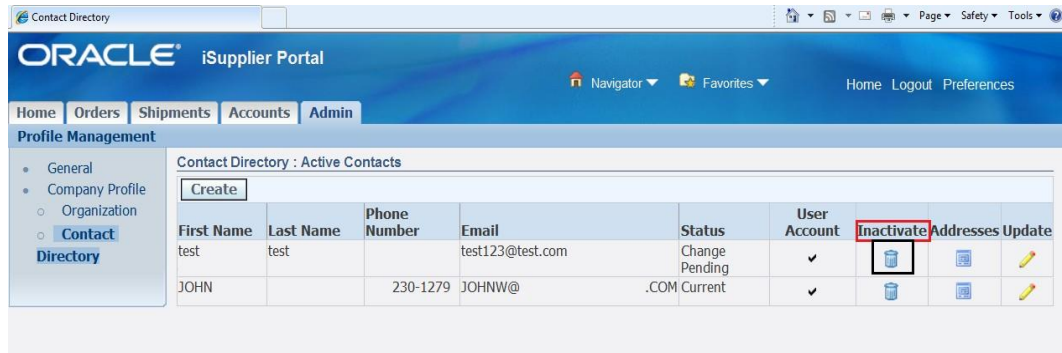
Fax Number: (empty)

Buttons: Cancel, Save

#### Inactivate a Contact

Follow the below steps to inactivate an existing contact:

Step	Action
1.	Click on the <b>Contact Directory</b> hyperlink.
2.	Click the <b>Inactivate icon</b> .
3.	A confirmation notification will appear that the Contact was inactivated.  <b>Note:</b> An email confirmation will be sent to the user inactivating the inactive contact.
4.	You will be able to view inactivated contacts in the ' <b>Contact Directory: Inactive Contacts</b> ' section



The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. The 'Admin' section is expanded to show 'Profile Management', which includes 'General', 'Company Profile', 'Organization', and 'Contact Directory'. The 'Contact Directory' section is active, displaying a table of 'Active Contacts'. The table has columns for 'First Name', 'Last Name', 'Phone Number', 'Email', 'Status', 'User Account', 'Inactivate', and 'Addresses Update'. The 'Inactivate' column contains a trash can icon for each contact. The first contact is 'test' with 'test' as the last name and 'test123@test.com' as the email. The second contact is 'JOHN' with '230-1279' as the phone number and 'JOHNW@.COM' as the email. The 'Inactivate' button for the first contact is highlighted with a red box.

First Name	Last Name	Phone Number	Email	Status	User Account	Inactivate	Addresses Update
test	test		test123@test.com	Change Pending	✓		
JOHN		230-1279	JOHNW@.COM	Current	✓		



# CPS Supplier Portal

## 05 - Self-Service "Admin"

Contact Directory

**ORACLE** iSupplier Portal

Home Logout Preferences

Home Orders Shipments Accounts Admin

**Profile Management**

- General
- Company Profile
- Organization
- Contact Directory**

**Confirmation**  
MEGAN has been removed from your Contact Directory.

**Contact Directory : Active Contacts**

Create

First Name	Last Name	Phone Number	Email	Status	User Account	Inactivate	Addresses	Update
test	test		test123@test.com	Change Pending	✓			
JOHN	WALSH	800 230-1279	JOHNW@	COM Current	✓			

**Contact Directory : Inactive Contacts**

First Name	Last Name	Phone Number	Email	Status	User Account
DANIEL		946-4100		Pending	
MEGAN		230-1279	MEGANG@	Pending	✓