

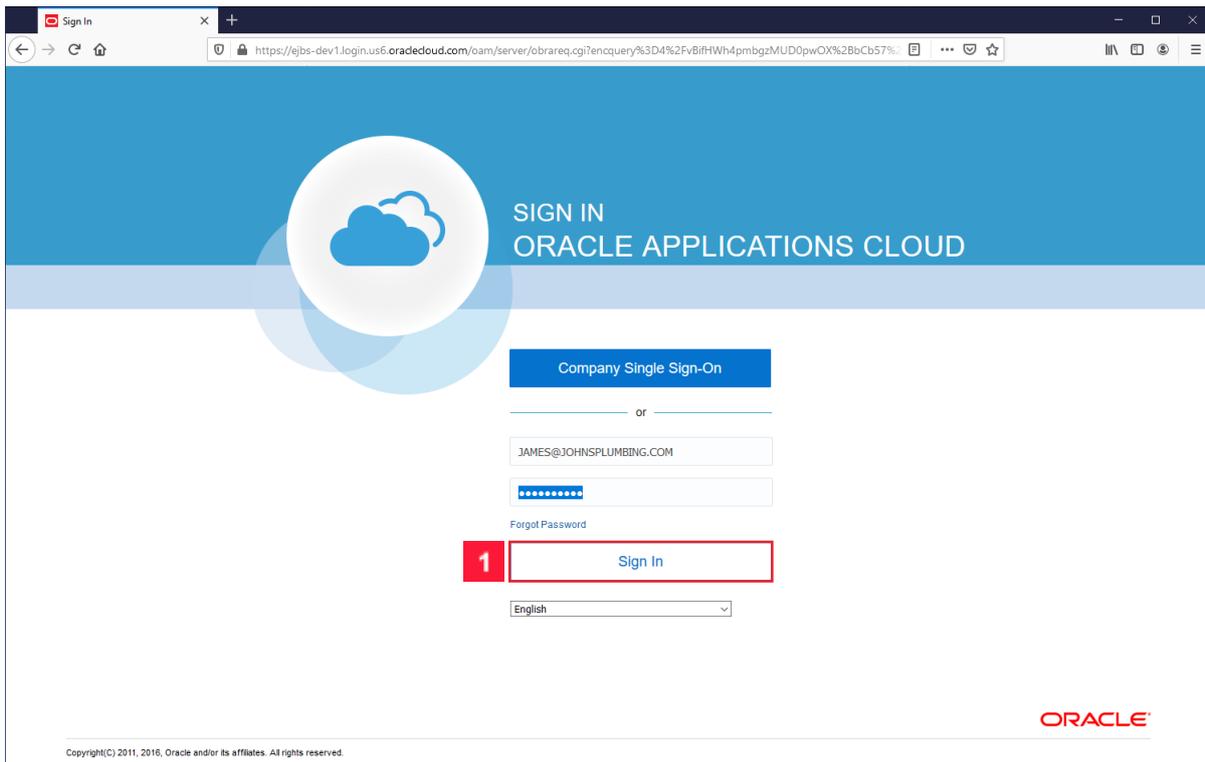
Manage Supplier Profile in Supplier Portal

As a Supplier for the City of Virginia Beach it is important to keep your Supplier profile updated. This allows the City to communicate with you regarding new bid opportunities, purchase orders, invoices and payments.

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1 Sign into Supplier Portal

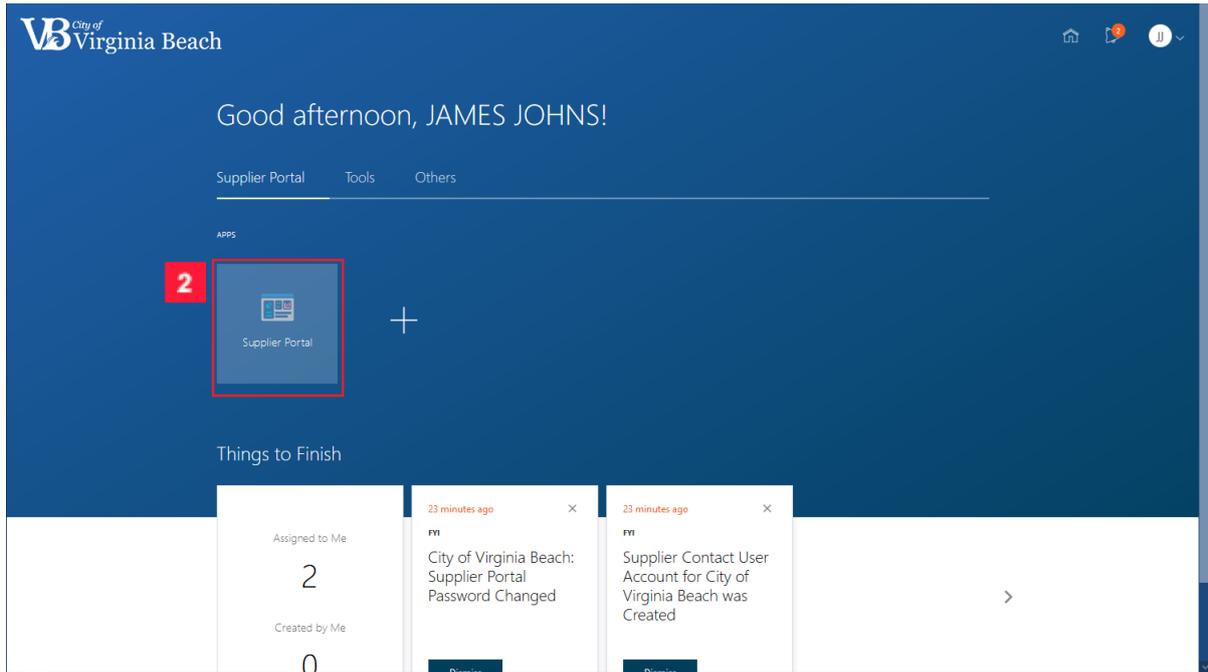


Enter *your user ID* in the **User ID** field. Enter *your password* in the **Password** field.

- Your user ID was sent to you in an email from the City of Virginia Beach when your Supplier Portal account was created. It also included a password reset link.
- If you do not have your user ID or Password click the **Forgot Password** link.

1 Click the **Sign In** button.

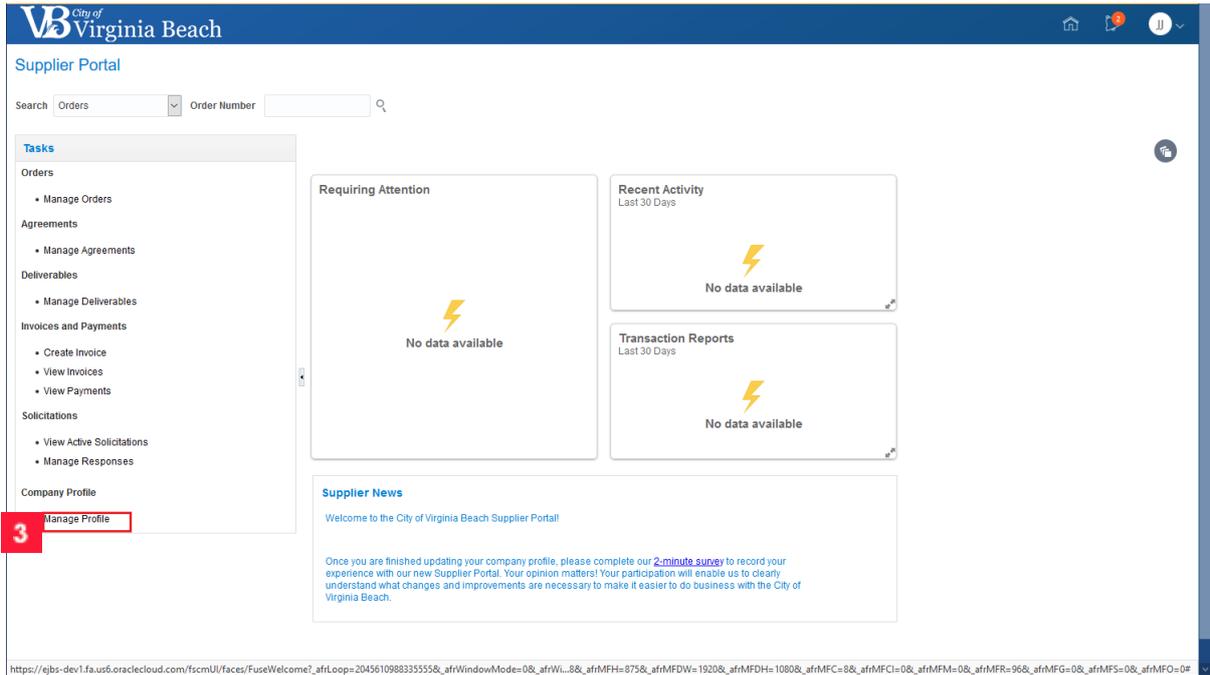
2 Your Home Page



- Notice the City of Virginia Beach logo in the top left corner and the Home icon on the top right. If you are on any other page and want to return to this Home page, click the **COVB logo** or the **Home icon**.
- Notice the Bell icon at the top of the page. The Bell icon will alert you to recent notifications on your account.
- The Setting & Actions menu, indicated by your initials in the top right corner, will enable you to personalize your account and access help resources.
- These icons at the top of the page will always be visible no matter what page you are on.

2 Click the **Supplier Portal** icon.

3 Supplier Portal Dashboard



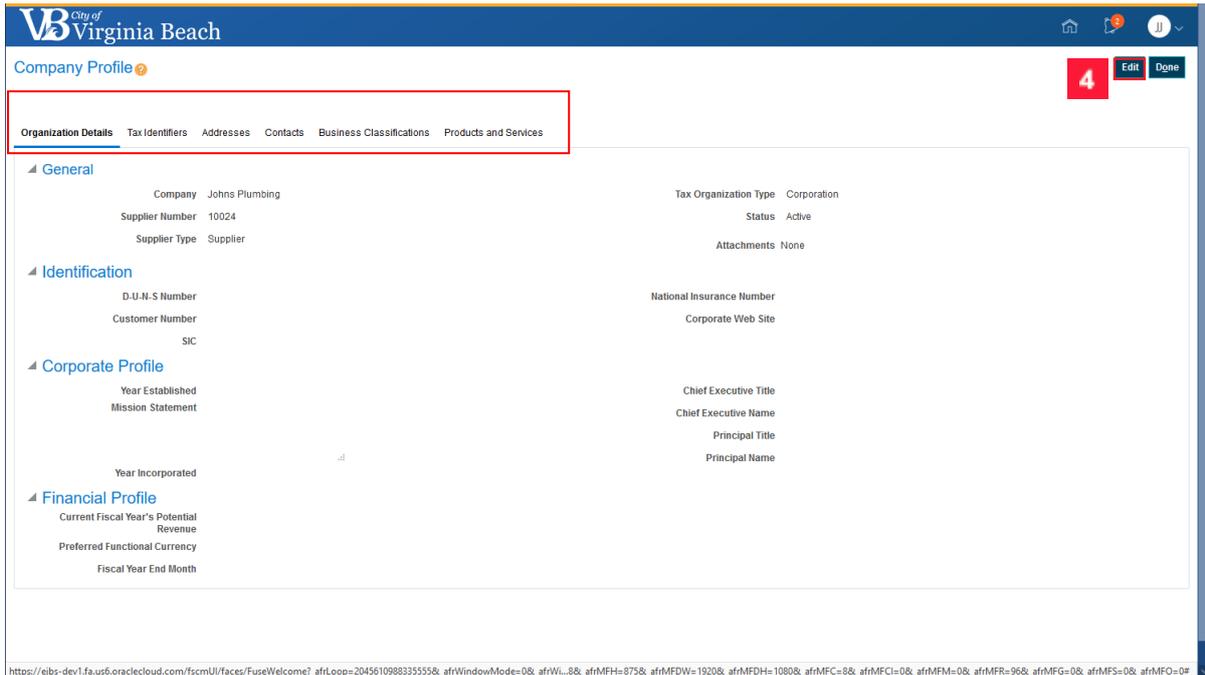
You are now viewing the **Supplier Portal** dashboard.

Notice the Home, Bell, and Settings & Actions icons at the top of the page are still visible.

- The Tasks menu is located on the left-hand side.
- In the middle are 3 infolets: Requiring Attention, Recent Activity and Transaction Reports. Currently, there is no data available because the Supplier account is new. As activity occurs, these fields will update with important information.
- Finally, Supplier News is located at the bottom of the page. This is where City of Virginia Beach will communicate news and updates to Suppliers.

3 Click the **Manage Profile** link in the **Tasks** menu.

4 Company Profile

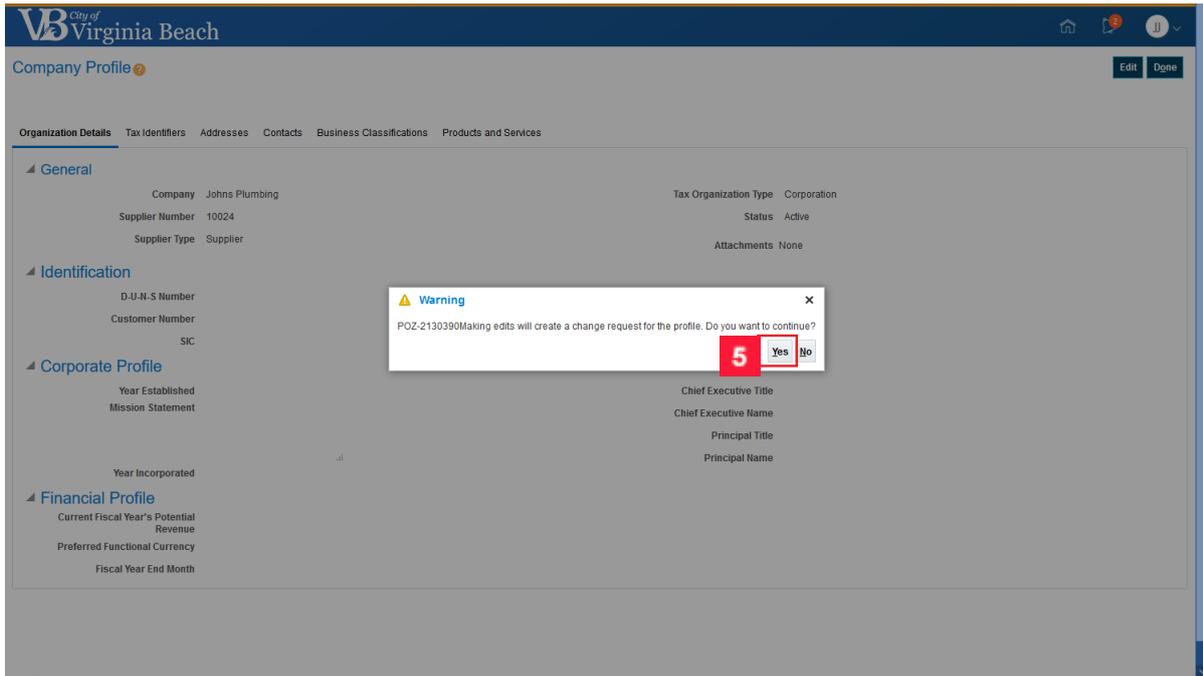


You are now viewing your Company Profile.

- Notice there are 7 groupings of information: **Organization Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, and Products and Services.**
- The **Organization Details** tab is currently displayed, as indicated by the underline found under **Organization Details.**
- After clicking **Edit**, a warning will appear. *“Making edits will create a change request for the profile. Do you want to continue?”* Click **Yes.**

4 Click the **Edit** button to update Company Profile information.

PLEASE USE ONLY UPPER CASE LETTERS WHEN ENTERING THE DATA



A warning message will appear letting you know that a change request will be created and asking if you want to continue editing.

5 Click the **Yes** button.

Organization Details

PLEASE USE ONLY UPPER CASE LETTERS WHEN ENTERING THE DATA

Click the **Change Description** input field.

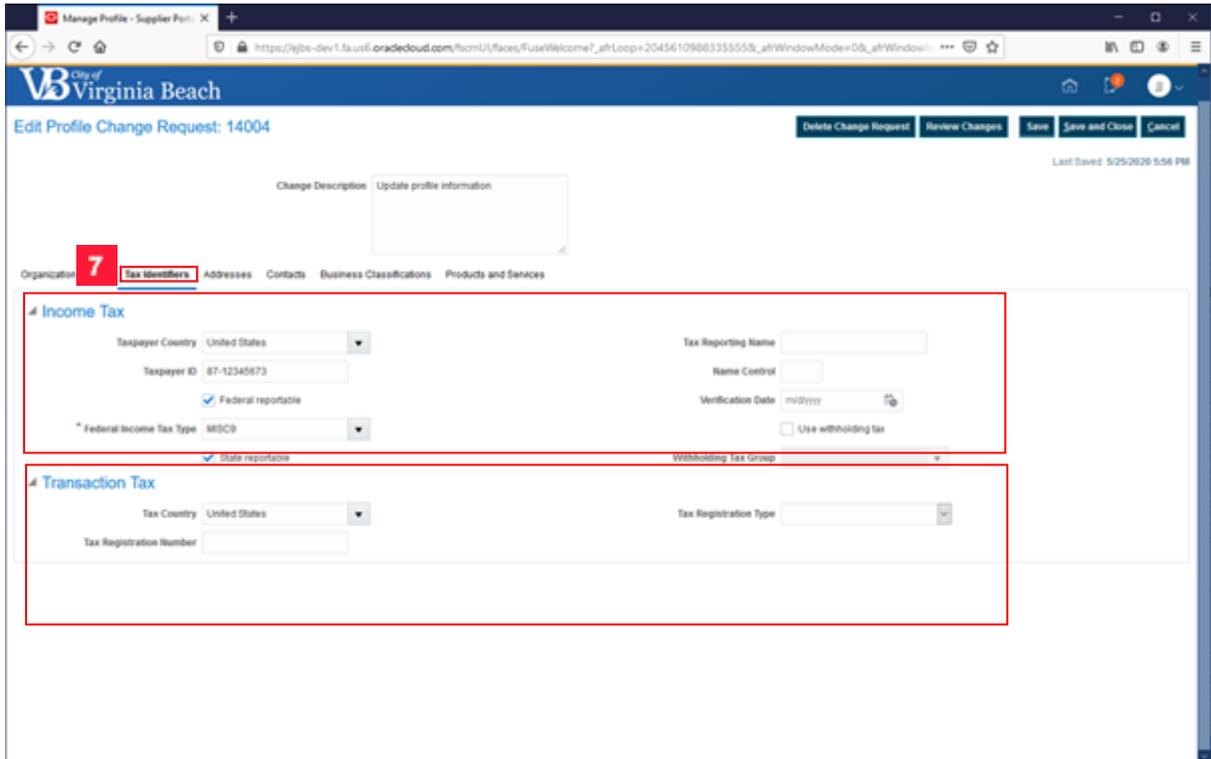
Insert a description of the updates you are making to your Company Profile. It can be general such as "Updating profile information" or a more detailed description. For example, "Updating address, contact phone number and business classification" or similar.

Update the information in the **General, Identification, Corporate Profile and Financial Profile** sections.

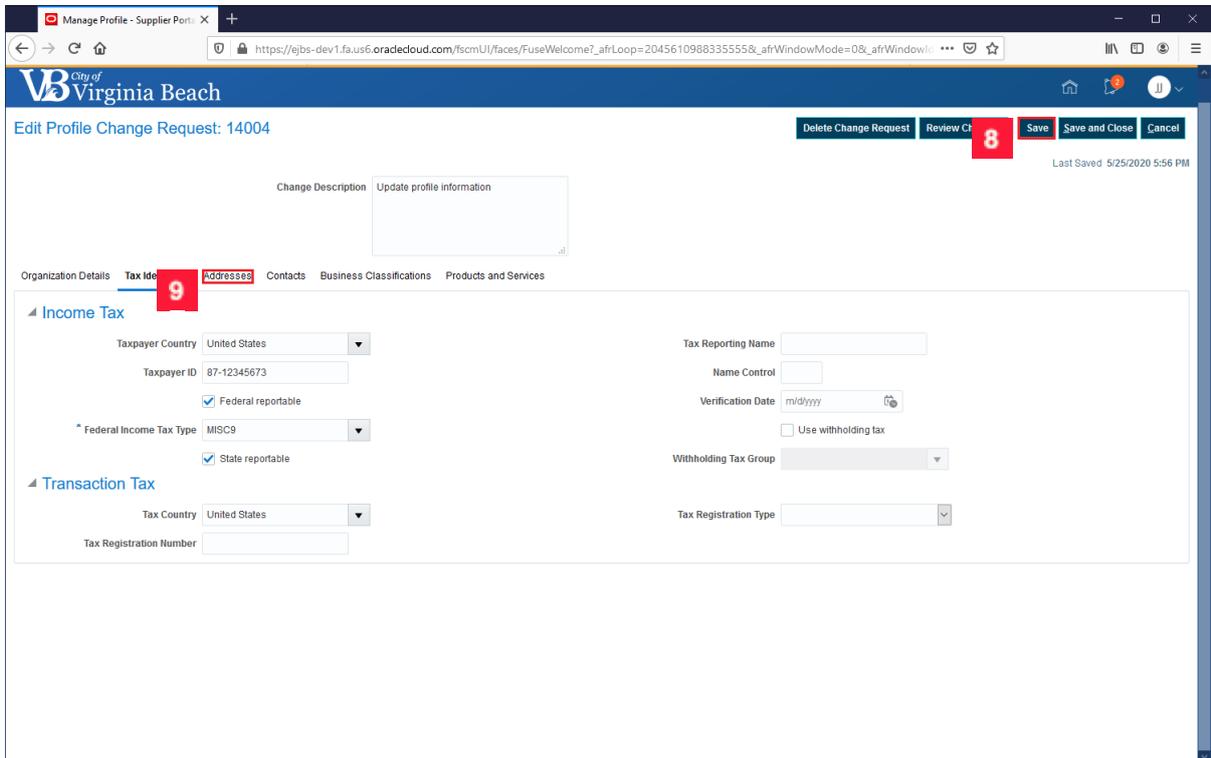
Update the information in the **Identification** section.

6 Click the **Save** input field.

Tax Identifiers



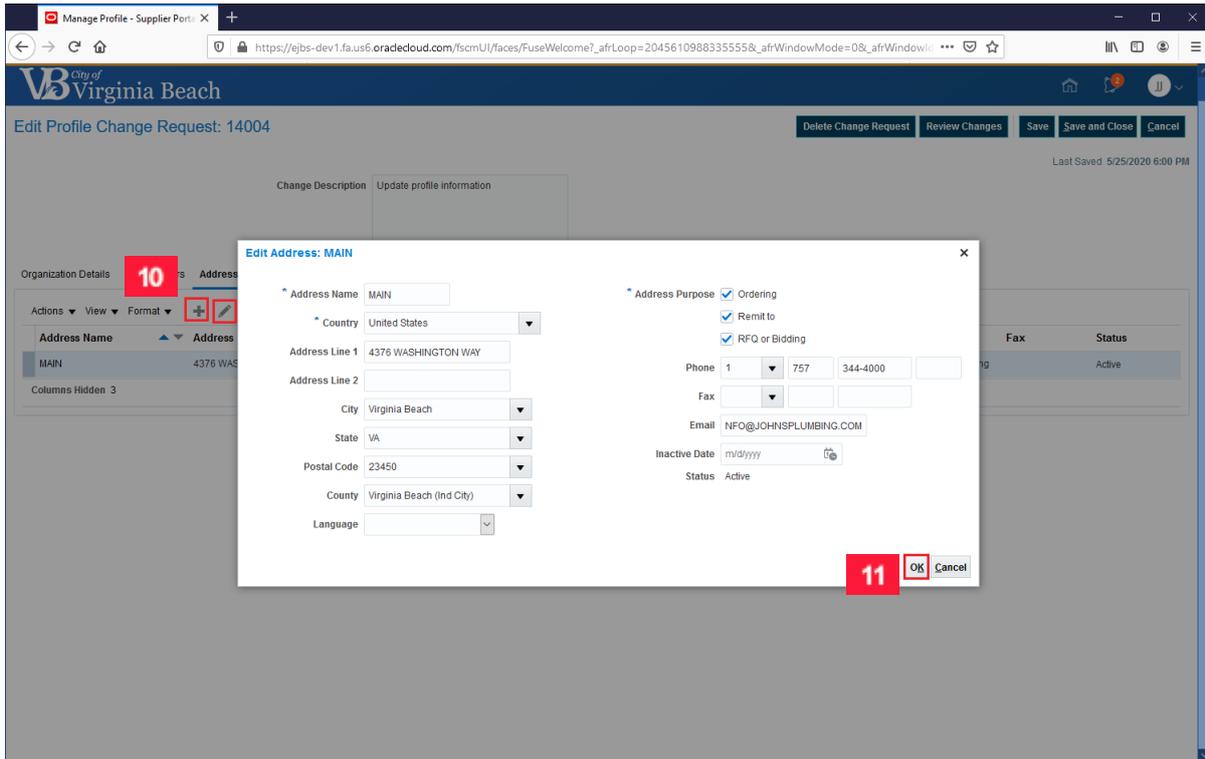
7 Click the **Tax Identifiers** tab. Update the information in the **Income Tax** and **Transaction Tax** sections.



8 Click the **Save** button.

9 Click the **Addresses** tab.

Address



PLEASE USE ONLY UPPER CASE LETTERS WHEN ENTERING THE DATA

A primary physical address is required plus any other addresses as applicable. The “Address Name” field for your primary address should be listed as “MAIN”. For additional addresses please use a five (5) letter abbreviation of the City and the street number. For example 123 Main Street Orlando FL would have an address name of ORLAN-123. Please note that each location must have a different “Address Name”.

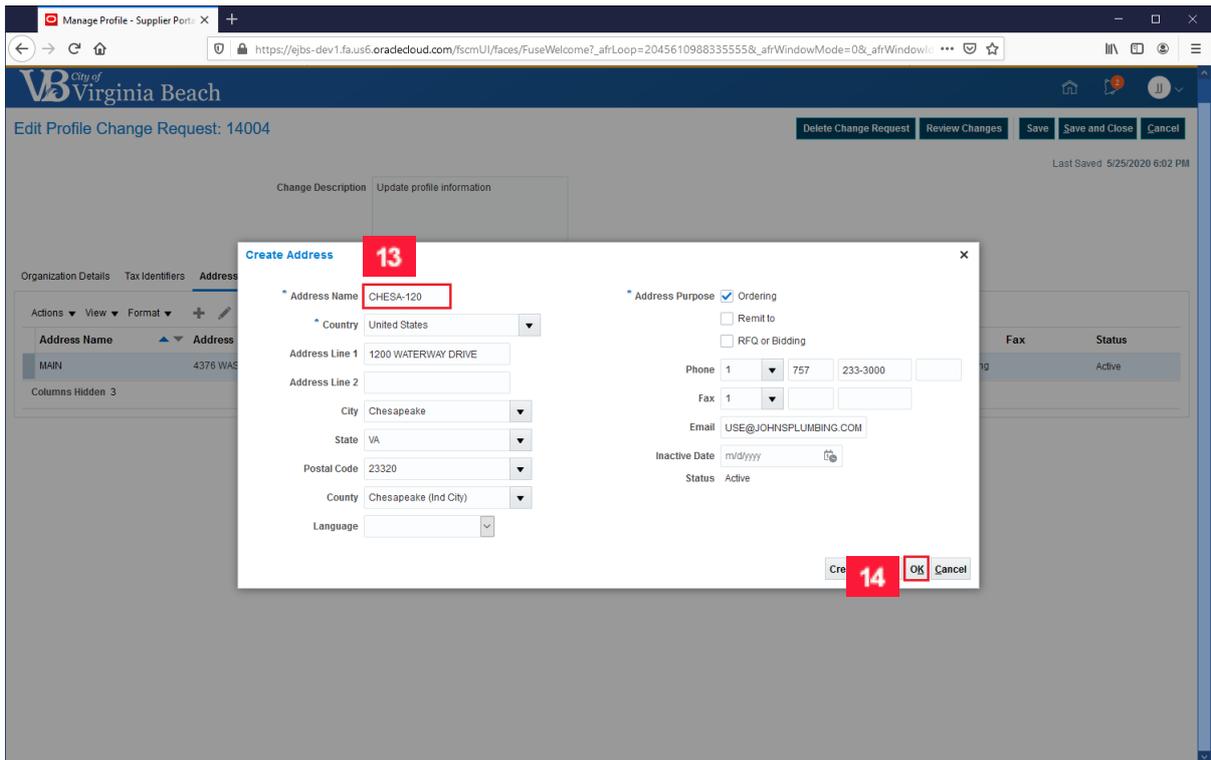
10 To edit an existing address, click the **Edit** (pencil) icon. (Creating a new address will be demonstrated starting at step 13.) The **Edit Address** window will appear. Insert all pertinent Address information.

11 Click the **OK** button.

The screenshot shows the 'Manage Profile - Supplier Profile' page in a web browser. The page title is 'Edit Profile Change Request: 14004'. At the top right, there are buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. Below the header, there is a 'Change Description' field with the text 'Update profile information'. The main content area has tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Business Classifications', and 'Products and Services'. The 'Addresses' tab is active, showing a table with columns: 'Address Name', 'Address', 'Phone', 'Address Purpose', 'Fax', and 'Status'. A red box labeled '12' highlights the plus sign icon in the 'Actions' column of the table. The table contains one row with the following data:

Address Name	Address	Phone	Address Purpose	Fax	Status
MAIN	4376 WASHINGTON WAY, VIRGINIA BEACH, VA 23450, Virginia Beach (Ind City)	+1 (757) 344-40...	Ordering, Remit to, RFQ or Bidding		Active

12 To create a new address, click the + (create) icon.



PLEASE USE ONLY UPPER CASE LETTERS WHEN ENTERING THE DATA

A primary physical address is required plus any other addresses as applicable. The “Address Name” field for your primary address should be listed as “MAIN”. For additional addresses please use a five (5) letter abbreviation of the City and the street number. For example 1200 Waterway Drive, Chesapeake, VA would have an address name of CHESA-120. Please note that each location must have a different “Address Name”.

13 Enter the appropriate **Address Name** code based on the above instruction into the **Address Name** field. Insert all pertinent Address information.

14 Click the **OK** button.

Contacts

Change Description: Update profile information

Organization Details Tax Identifiers **16** Contacts Business Classifications Products and Services

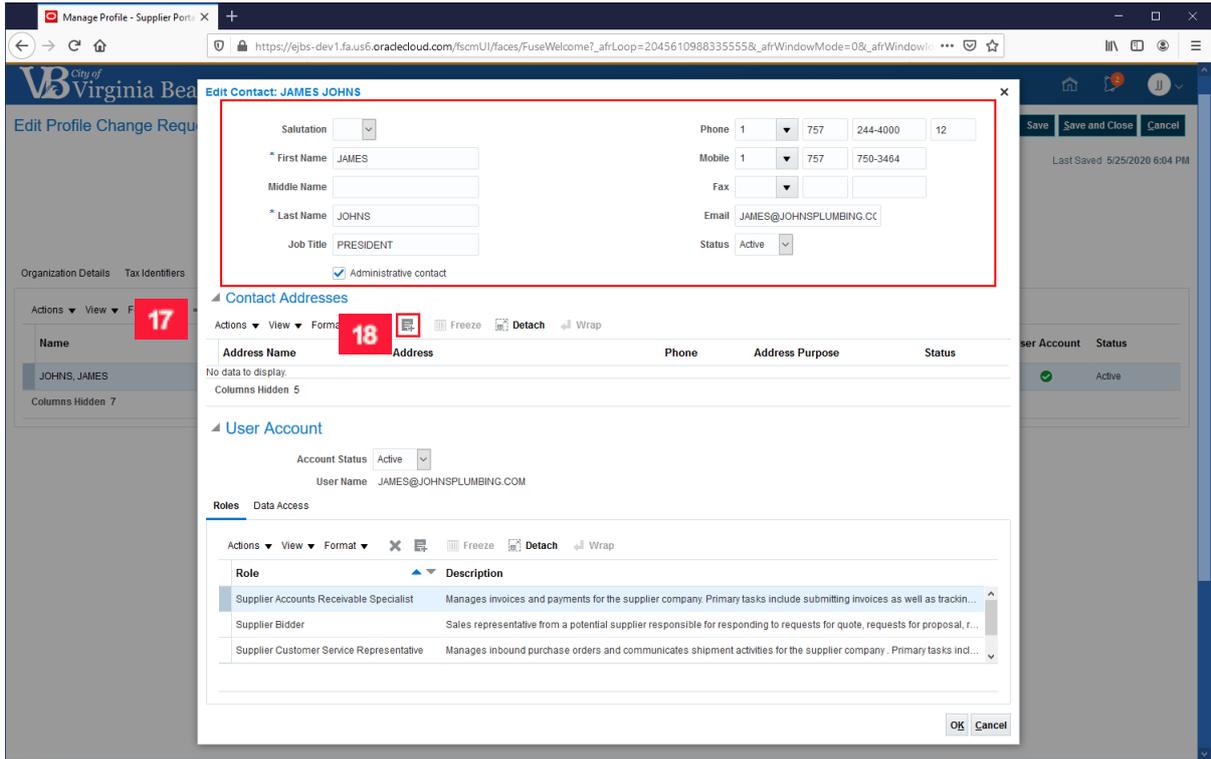
Address Name	Address	Phone	Address Purpose	Fax	Status
CHESA-120	1200 WATERWAY DRIVE, CHESAPEAKE, VA 23320, Chesapeake (Ind City)	+1 (757) 233-30...	Ordering		Active
MAN	4376 WASHINGTON WAY, VIRGINIA BEACH, VA 23450, Virginia Beach (Ind City)	+1 (757) 344-40...	Ordering, Remit to; RFQ or Bidding		Active

Columns Hidden: 3

You can now see a second address has been added.

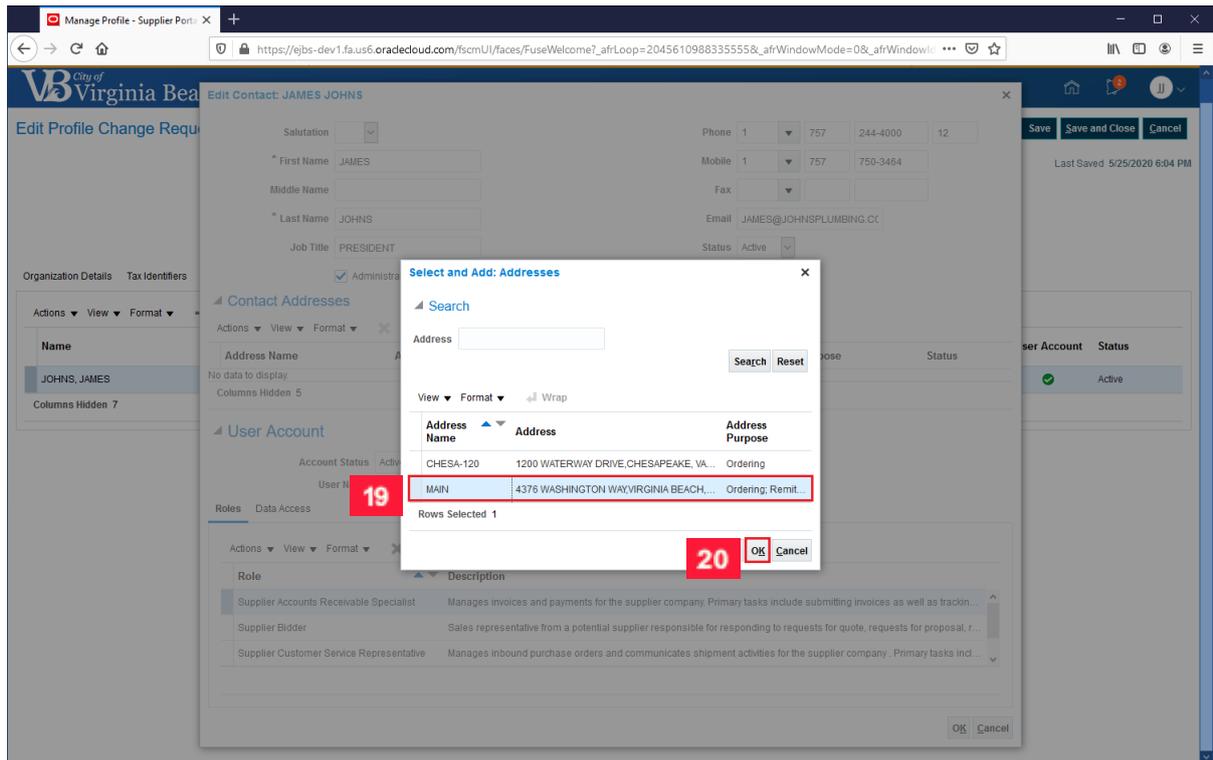
15 Click the **Save** button.

16 Click the **Contacts** tab.



17 You will see at least one contact listed. Select it so it is highlighted in blue. Click the **Edit** (pencil) icon. (Creating a new contact will be demonstrated starting at step 24.) The Edit Contact window will appear. Insert pertinent contact information.

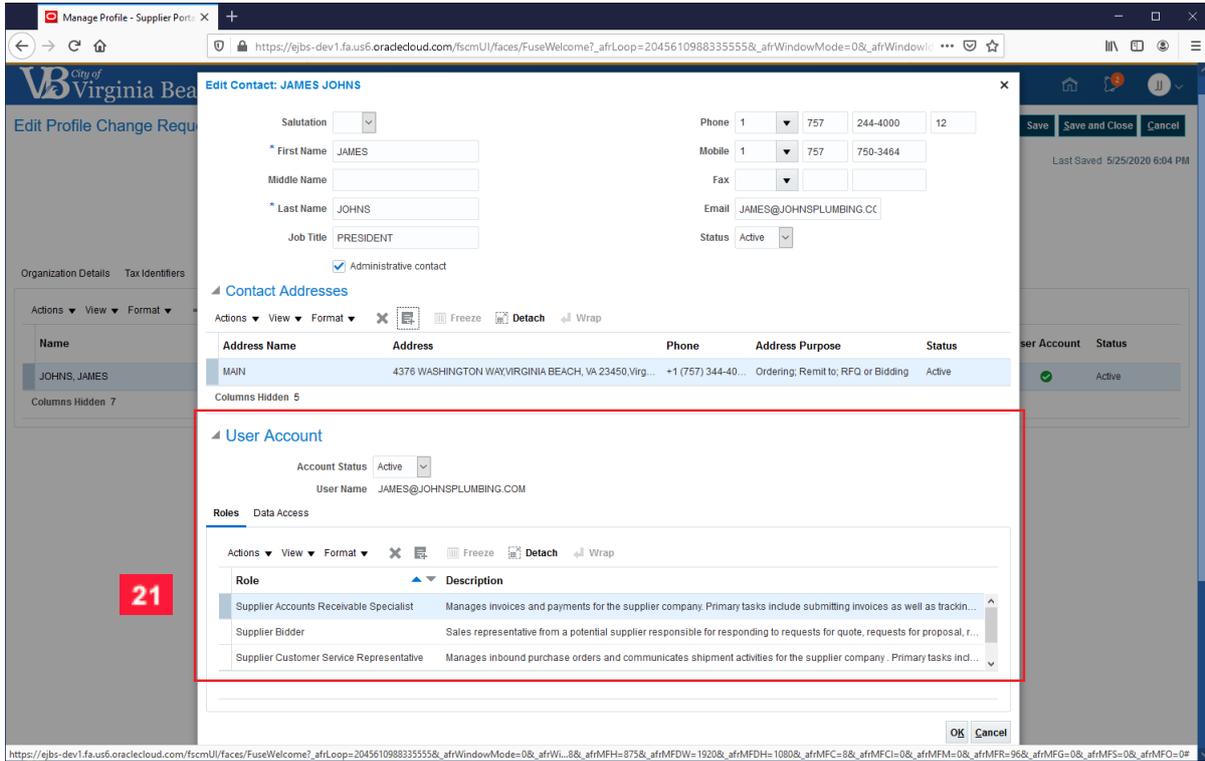
18 Click the **Select and Add** button.



In the Contact Addresses section, you can associate a Contact with a specific Company Address, depending on their location or role. Click the Select and Add button. The **Select and Add: Addresses** window will appear.

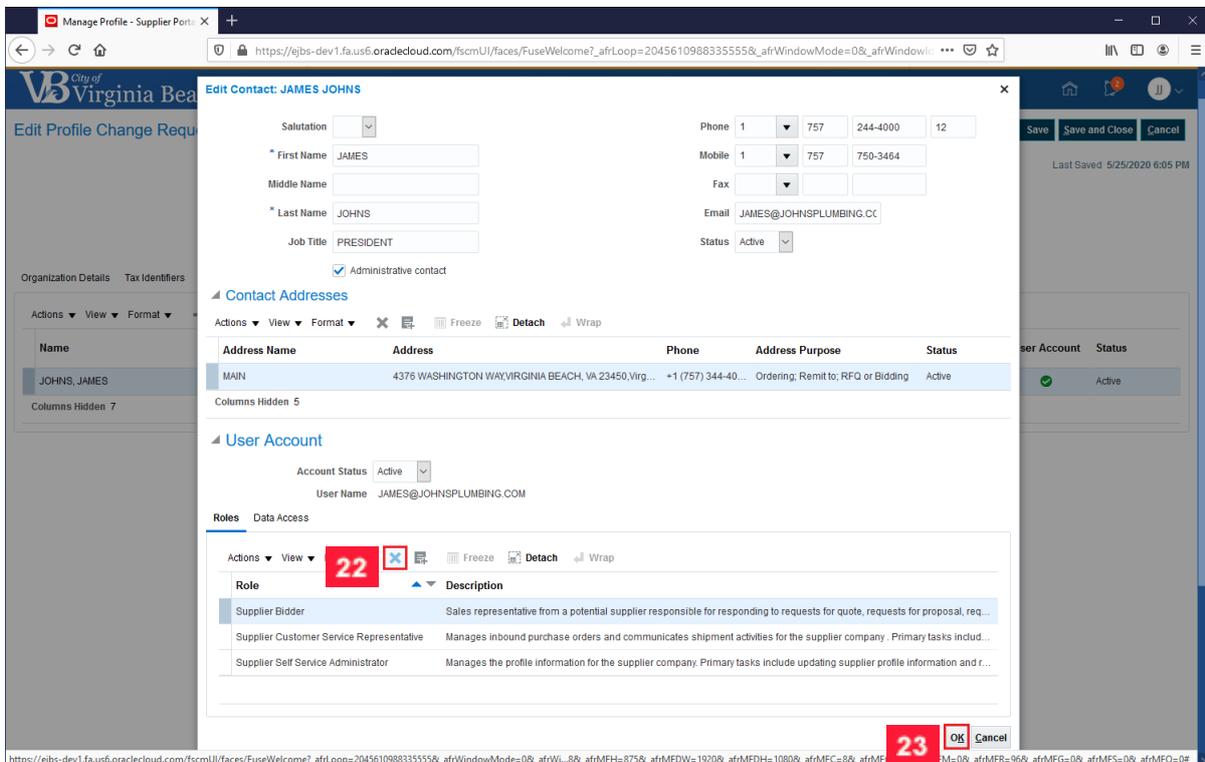
19 Select the desired location to associate with this Contact.

20 Click the **OK** button.



By default, there are four roles automatically added to a User account: **Supplier Accounts Receivable Specialist**, **Supplier Bidder**, **Supplier Customer Service Representative** and **Supplier Inventory Manager**. You can remove any of these roles. Select the role you would like to remove (if applicable) by clicking on it so it turns blue.

21 Click the row.



22 Click the X icon (remove) icon.

23 Click **OK**.

Change Description: Update profile information

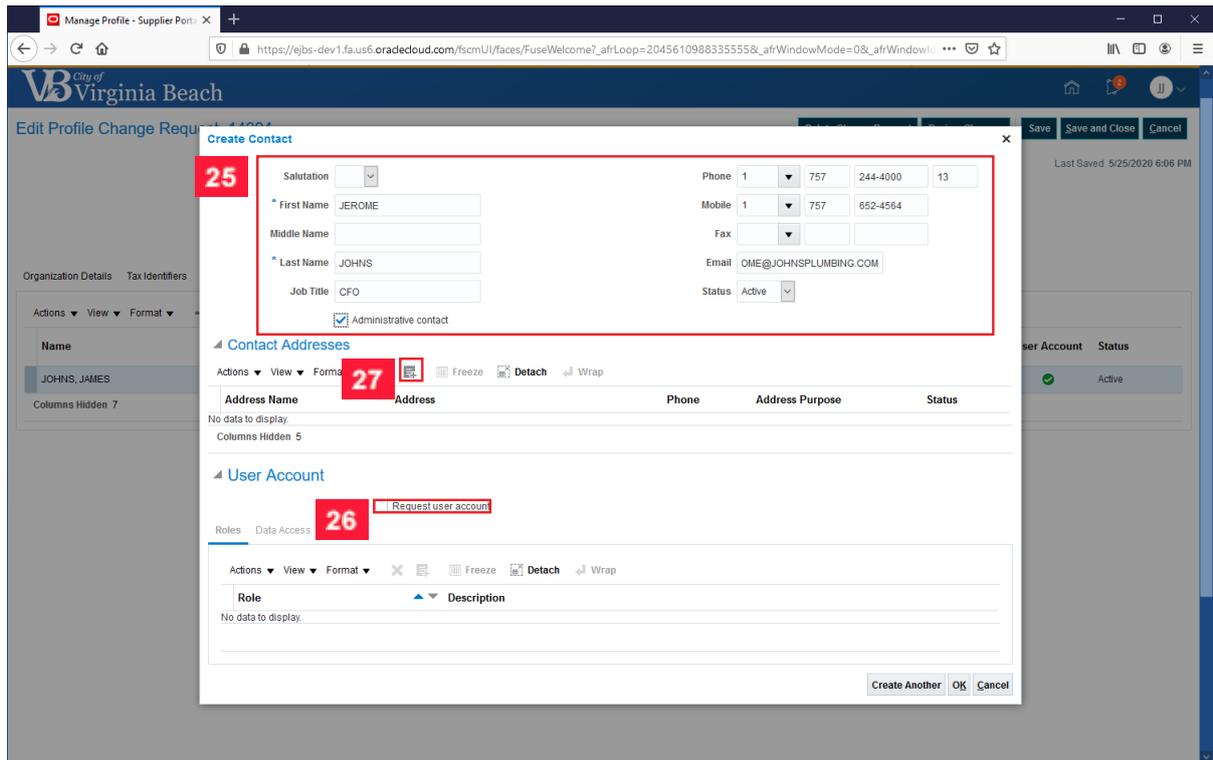
Organization Details Tax Identifiers Addresses **Contacts** Business Classifications Products and Services

Actions View **24** + ✕ Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
JOHNS, JAMES	PRESIDENT	JAMES@JOHNSPLUMBING.COM	+1 (757) 244-40...	✓	✓	Active

Columns Hidden 7

24 To create a new Contact, click the + icon (create).



PLEASE USE ONLY UPPER CASE LETTERS WHEN ENTERING THE DATA

The Create Contact window will appear.

- 25** Enter the Contact details, such as **First Name, Last Name, Job Title, Phone Numbers, and Email Address.**

If this Contact is an Administrative contact, a person who maintains the company profile and requests user accounts for their fellow employees, then click the **Administrative contact** checkbox. You must identify at least one contact as an Administrative contact. You may have more than one Administrative contact.
- 26** If this Contact requires a Supplier Portal user account, select the **Request user account** checkbox. A user ID and password reset link will be sent to them using the email address indicated.

If this contact does not need a Supplier Portal user account do not check the **Request user account** checkbox.
- 27** In the **Contact Addresses** section, you can associate a Contact with a specific Company Addresses, depending on their location or role. Click the **Select and Add** button.

Salutation

* First Name JEROME

Middle Name

* Last Name JOHNS

Job Title CFO

Phone 1 757 244-4000 13

Mobile 1 757 652-4564

Fax

Email OME@JOHNSPLUMBING.COM

Status Active

Administrative contact

28

Address Name	Address	Phone	Address Purpose	Status
CHESA-120	1200 WATERWAY DRIVE, CHESAPEAKE, VA 23320 Chesapeake, VA	+1 (757) 233-30...	Ordering	Active

Columns Hidden 5

29 OK Cancel

28 Click the row to add so it is highlighted in blue.

29 Click the **OK** button.

Business Classification

Change Description: Update profile information

Organization Details Tax Identifiers Addresses **32 Business Classifications** Products and Services

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
JOHNS, JAMES	PRESIDENT	JAMES@JOHNSPLUMBING.COM	+1 (757) 244-40...	✓	✓	Active
JOHNS, JEROME	CFO	JEROME@JOHNSPLUMBING.COM	+1 (757) 244-40...	✓		Active

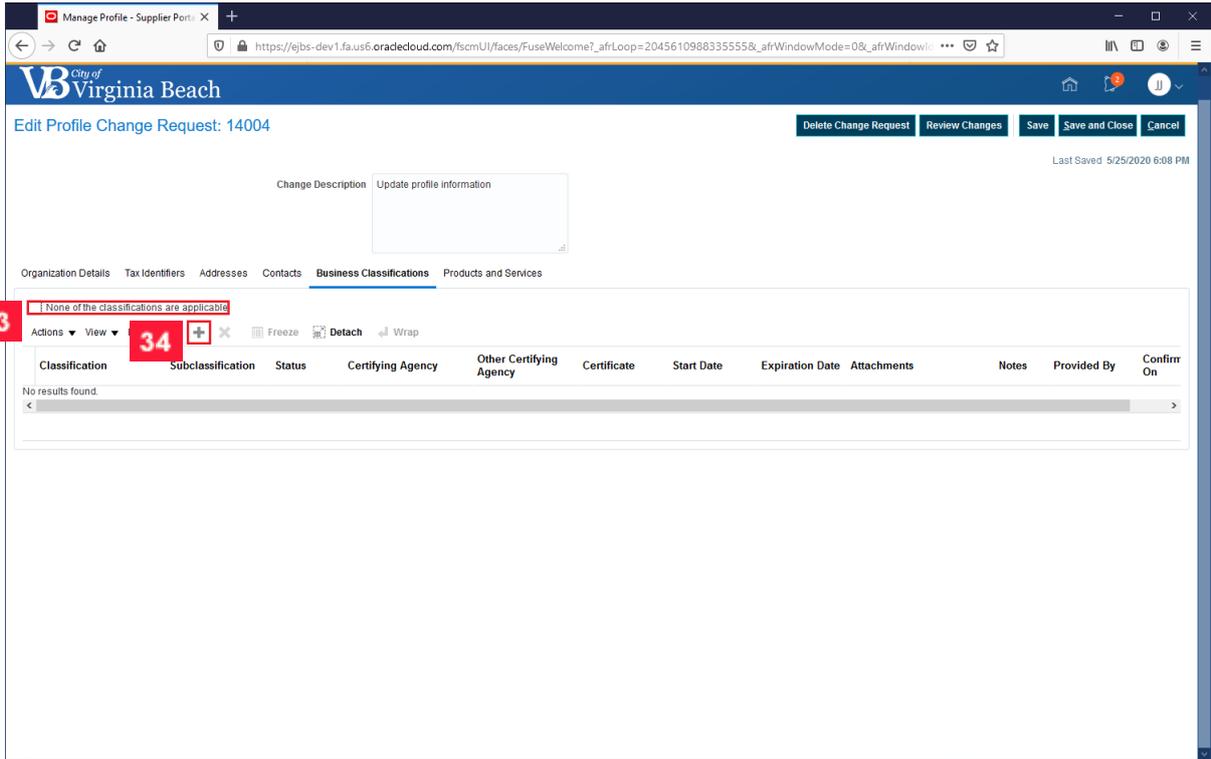
Columns Hidden 7

31 Save

Last Saved 5/25/2020 6:08 PM

31 Click the **Save** button.

32 Click the **Business Classifications** tab.

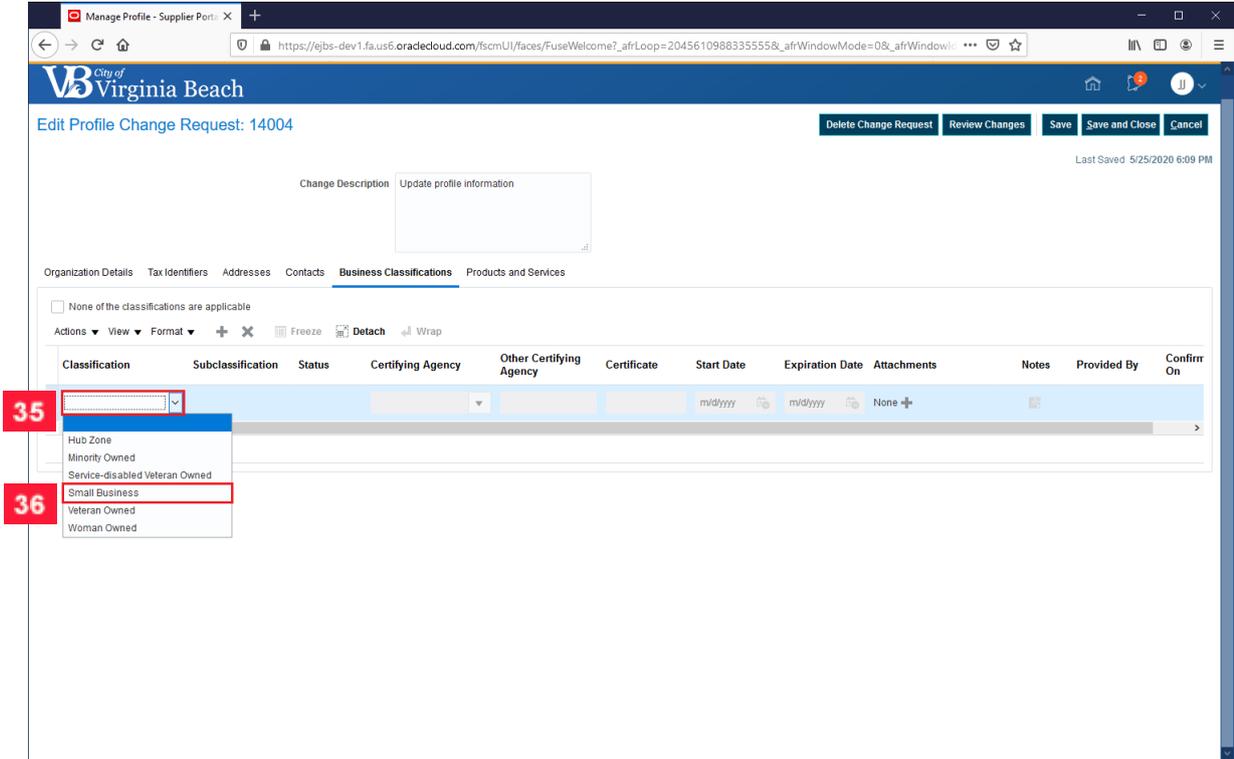


Examples of business classifications include: Small, Woman, Minority and/or Service-disabled Veteran-owned. If your company does not meet any of the business classifications, please select the box for None. This data is mandatory, and you cannot complete registration without completing.

33 If none of these classifications are applicable to your company, select the **None of the classifications are applicable** checkbox.

34 Alternatively, to add your company’s business classifications, click the **+** (add) icon.

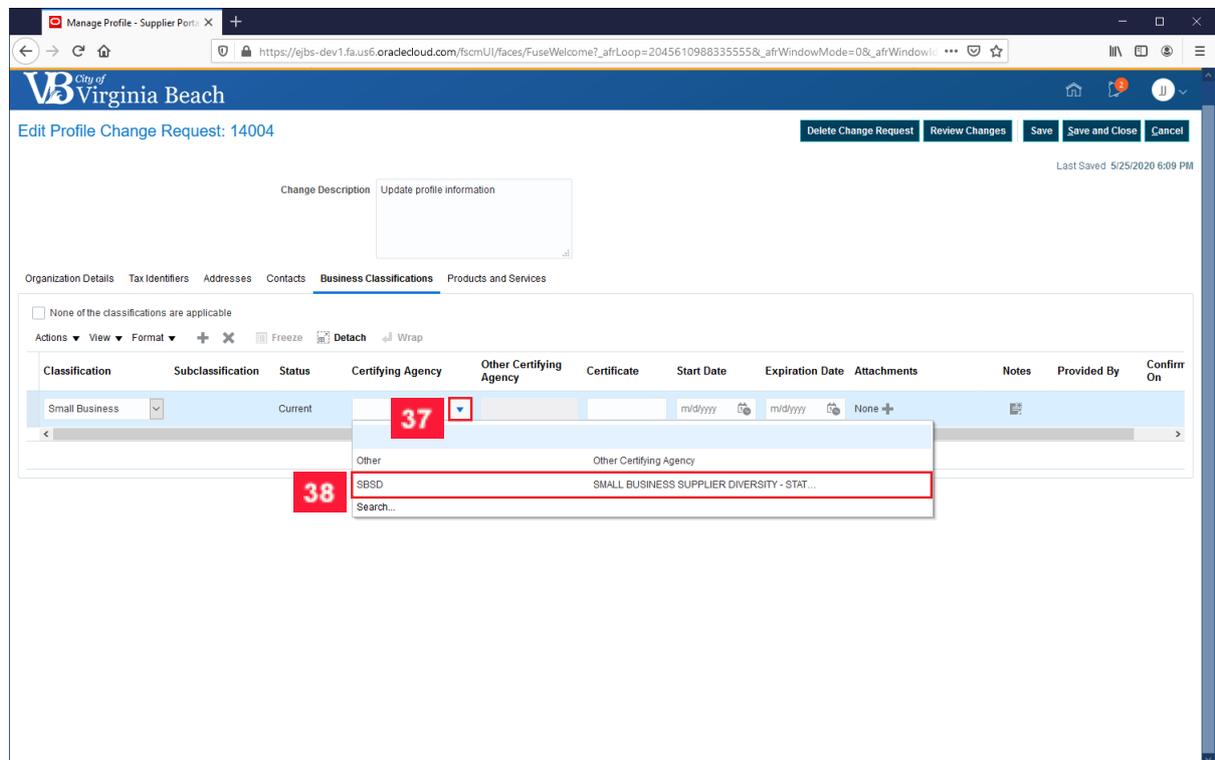
City of Virginia Beach: Manage Supplier Profile



Please add all applicable classifications and provide any certifications, if available. Self-certification is also acceptable. Please use upper case letters only when entering the data.

35 Click the **Classification** field to view the options from the drop-down list.

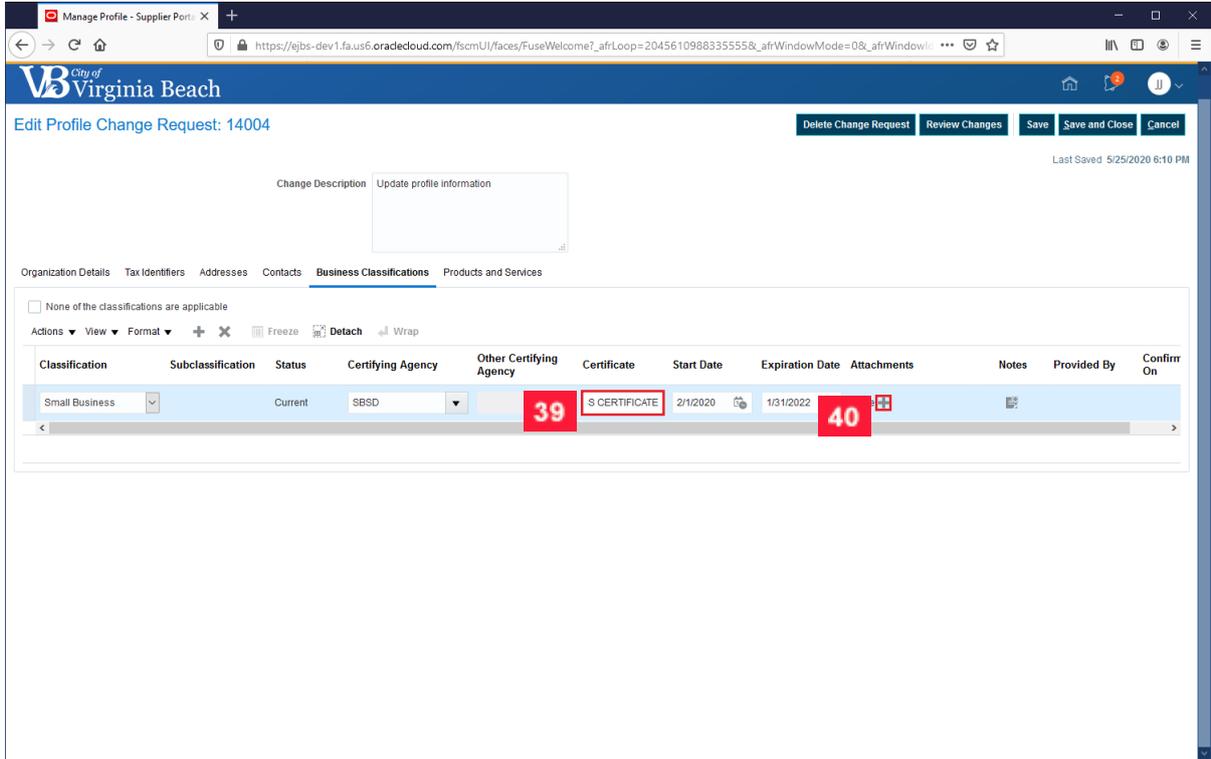
36 Select the appropriate item from the drop-down list. In this example, we are selecting the **Small Business** list item.



37 Click the **Search: Certifying Agency** drop-down arrow.

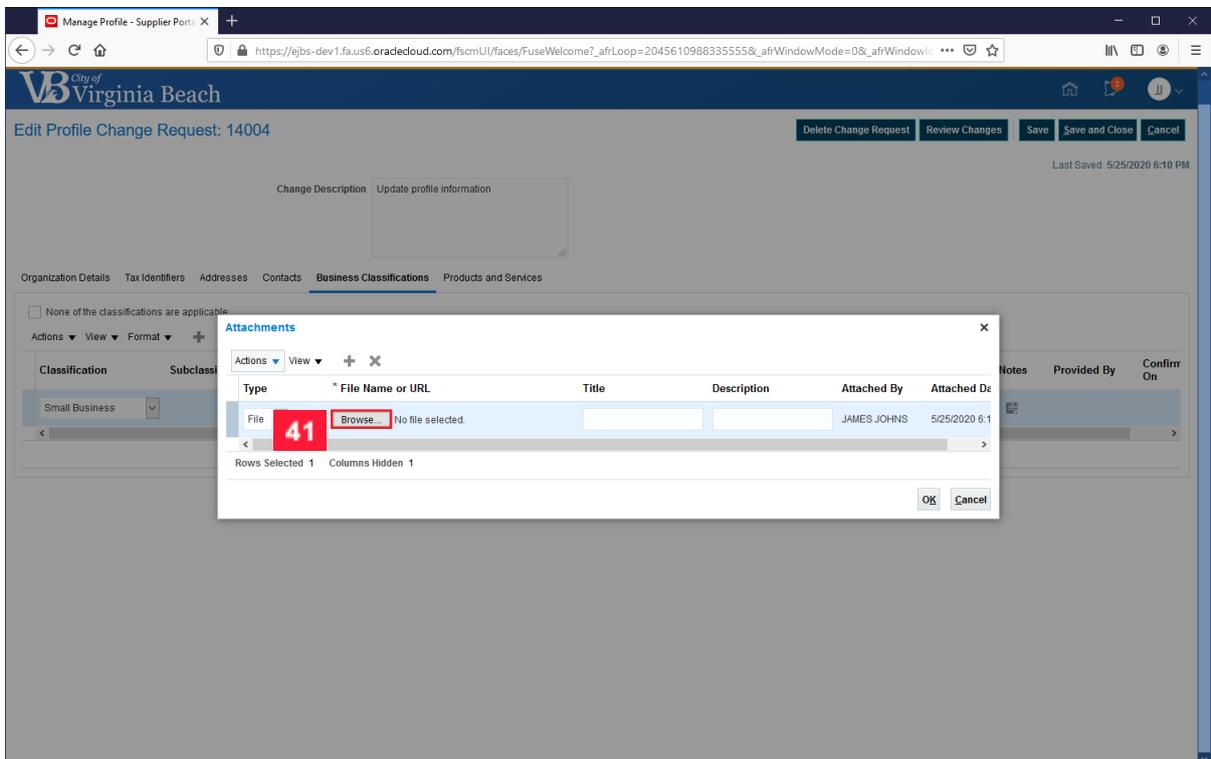
38 Select the appropriate option from the drop-down options.

City of Virginia Beach: Manage Supplier Profile



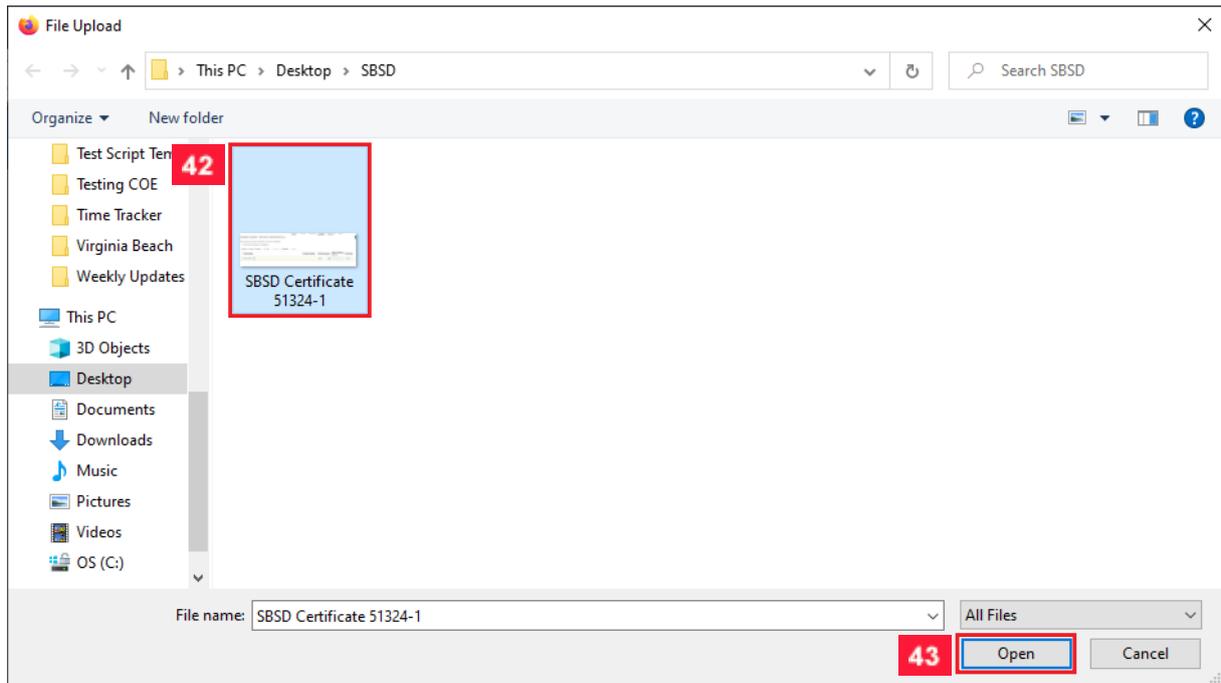
39 Click the **Certificate** input field and identify the type of certificate, if applicable.

40 Click the **+** (add) icon to add any attachments such as a copy of your certificate, a letter from your certifying agency or similar.



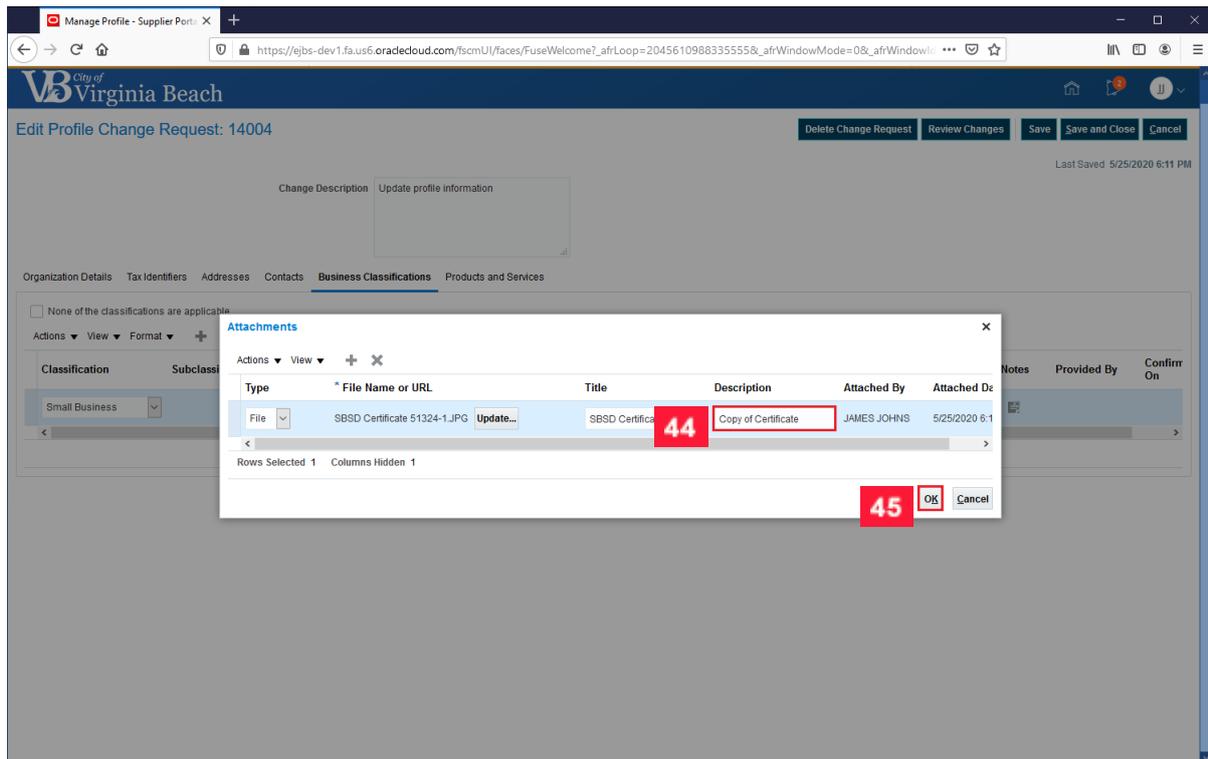
41 Click the **Browse** button to select the location of the attachment.

File Upload



42 Identify the location of the desired document.

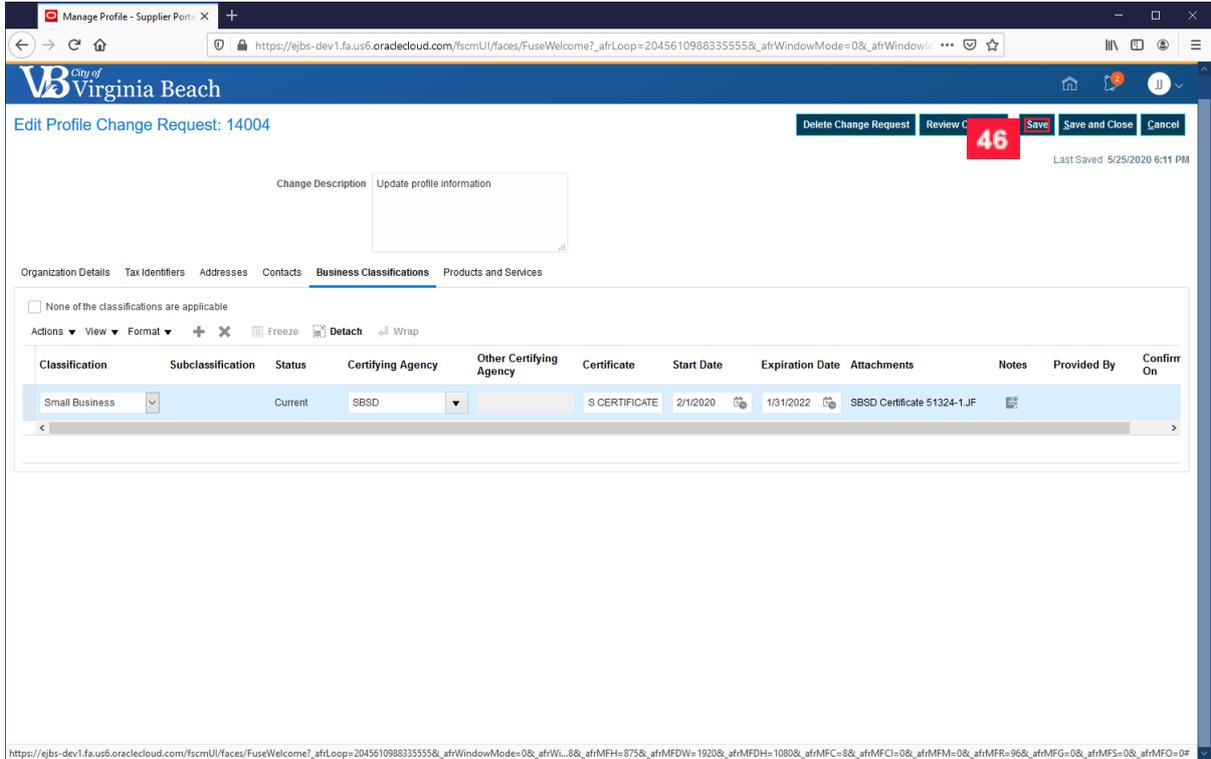
43 Click the **Open** button.



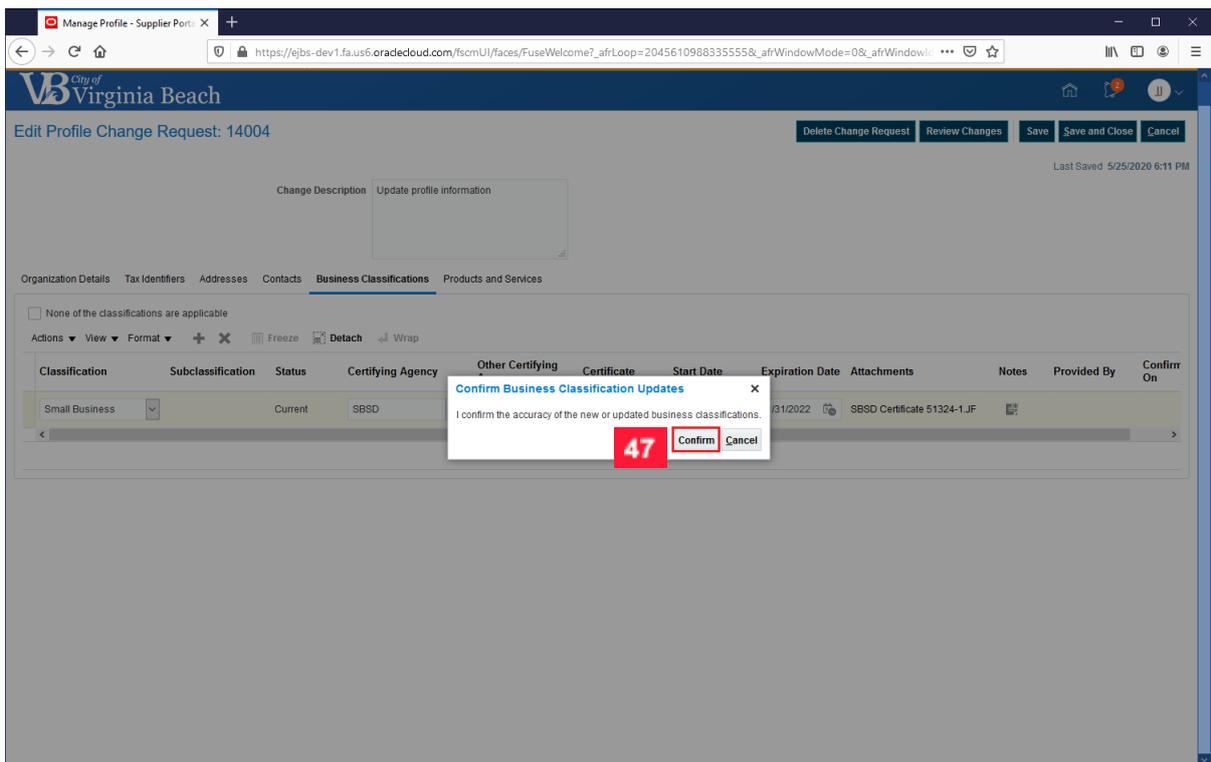
44 Click the **Description** field and describe the attachment.

45 Click the **OK** button.

City of Virginia Beach: Manage Supplier Profile



46 Click the **Save** button.



47 A window will appear to ask you to confirm the accuracy of the business classification(s). Click the **Confirm** button.

Products and Services

Change Description: Update profile information

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

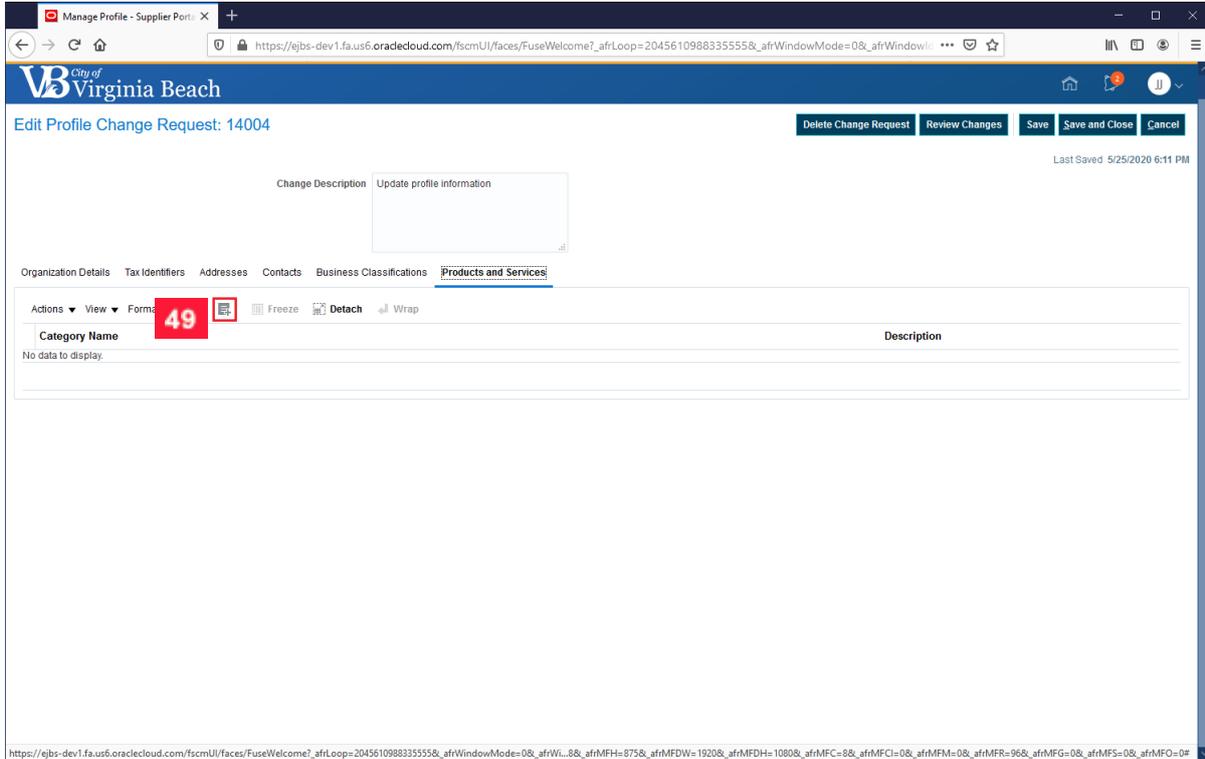
None of the classifications are applicable

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirm On
Small Business		Current	SBSD		SMALL BUSINE:	2/1/2020	1/31/2022	SBSD Certificate 51324-1.JF		JAMES JOHNS	5/25/202

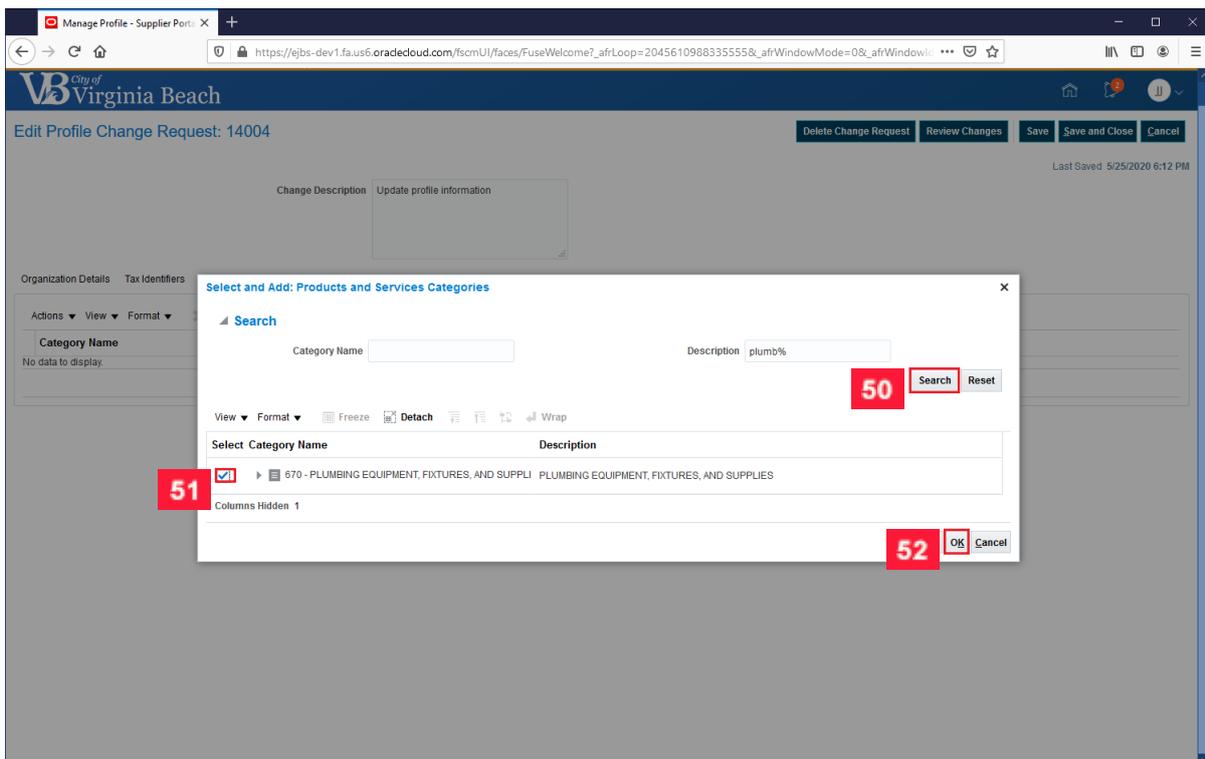
48 Click the **Products and Services** tab.

An updated and accurate list of **Products and Services** is critical information. This allows COVB to notify you of bid opportunities and solicitations that are specific to the products and services your company provides. The products and services are National Institute of Governmental Purchasing (NIGP) codes. Please select all products and services that your company may provide.

City of Virginia Beach: Manage Supplier Profile



49 Click the **Select and Add** button.



Search for the types of Products and Services your Company provides by entering keywords in the **Description** field.

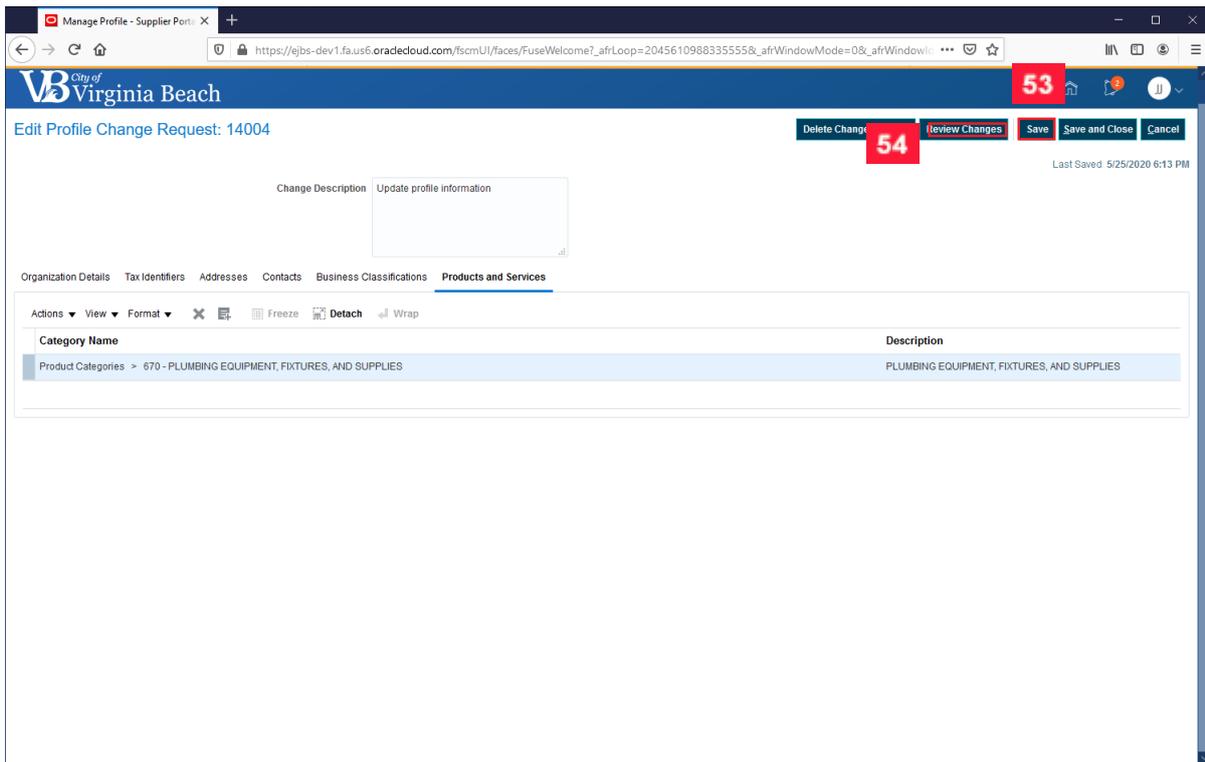
50 Click the **Search** button.

When results appear, you may select the relevant item(s).

51 Click a checkbox next to the desired **Category Name** and **Description**.

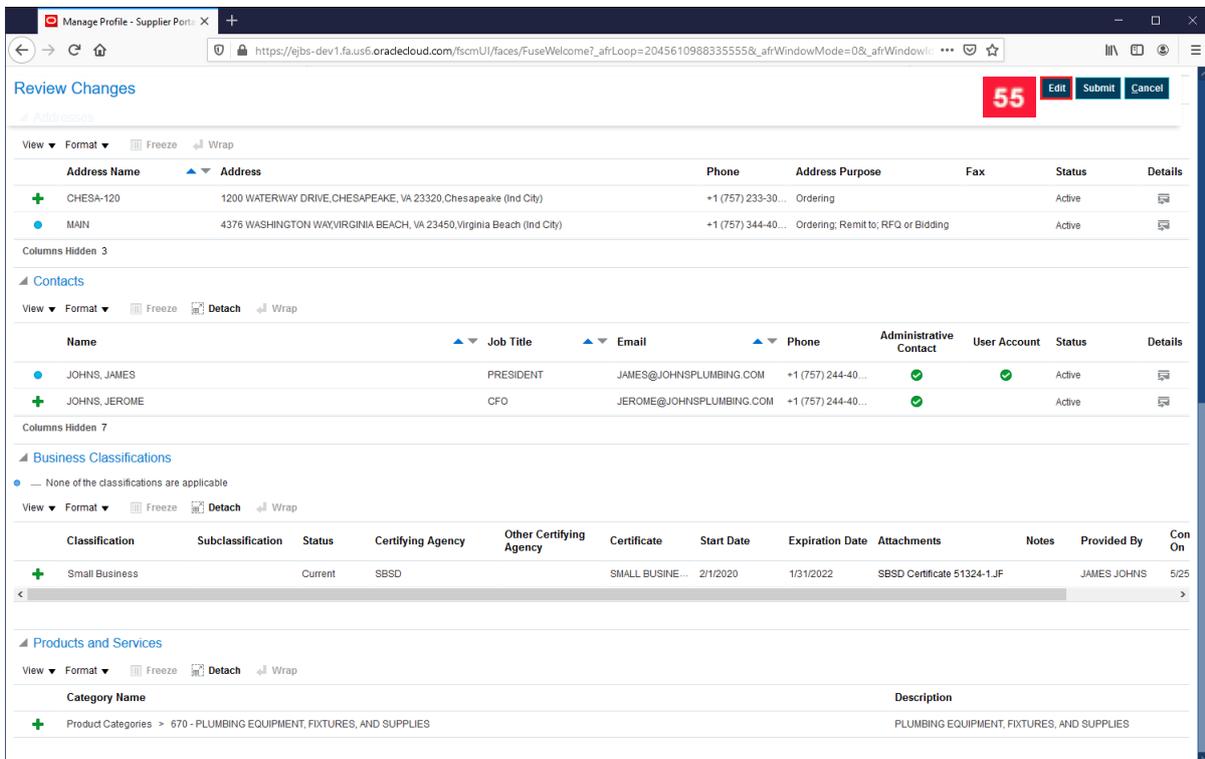
52 Click the **OK** button.

5 Review Changes and Submit



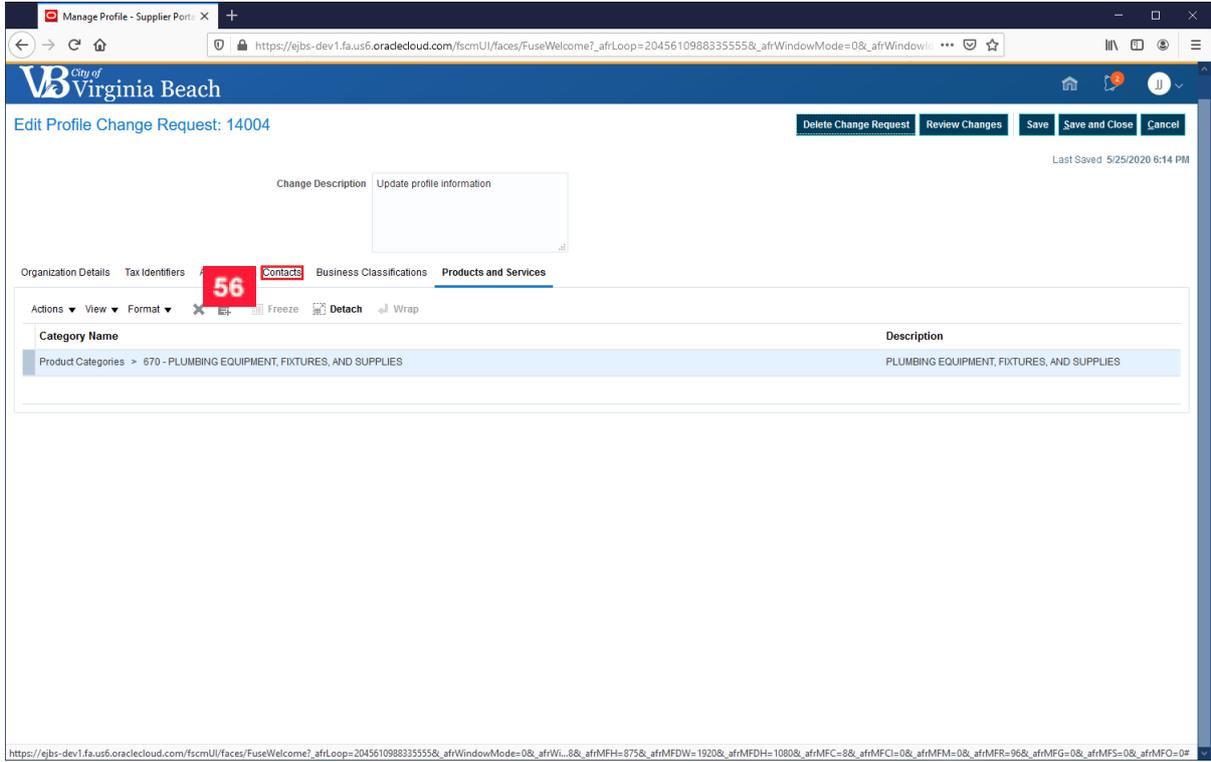
53 Click the **Save** button.

54 Click the **Review Changes** input field.

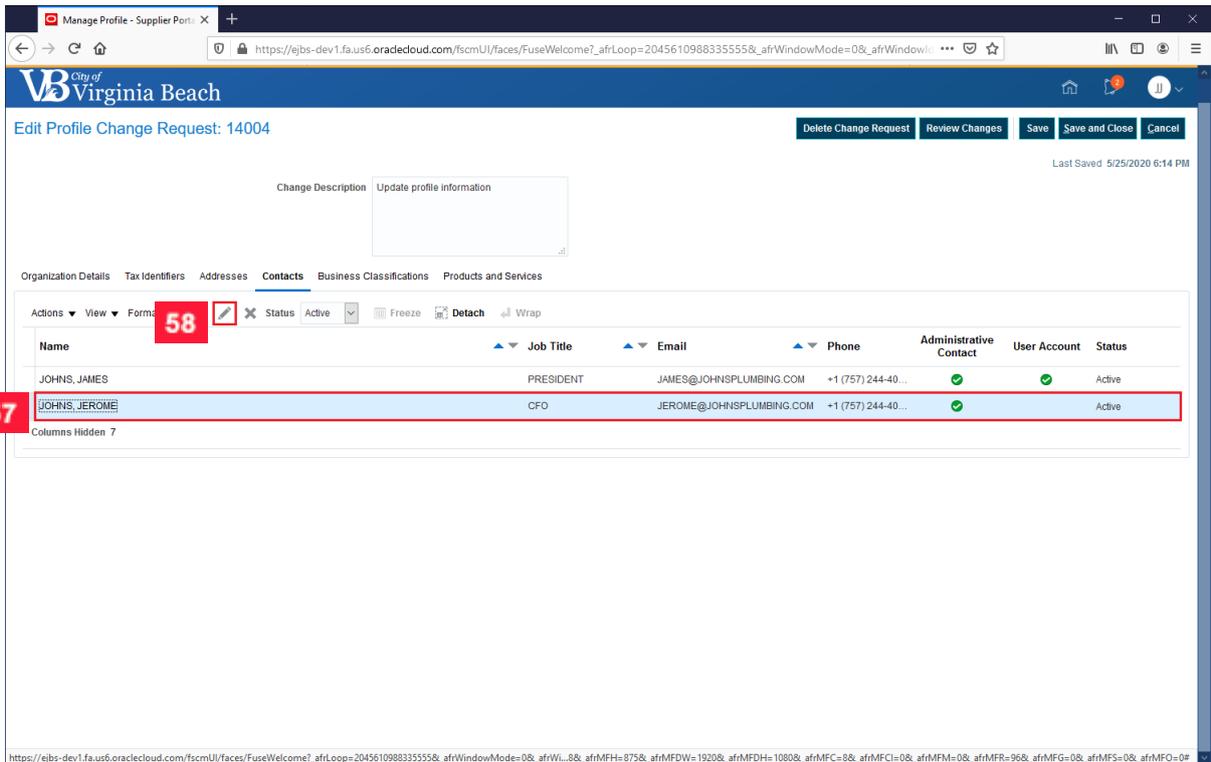


55 Review all the changes made to the Company Profile. If any additional changes are needed, click the **Edit** button.

City of Virginia Beach: Manage Supplier Profile



56 Go to the tab where edits need to be made. In this example, we will make another change in the **Contacts** tab.



57 Click the item to be edited.

58 Click the **Edit** (pencil) icon.

City of Virginia Beach: Manage Supplier Profile

Edit Contact: JEROME JOHNS

Salutation: [Dropdown]
 * First Name: JEROME
 Middle Name: [Text Field]
 * Last Name: JOHNS
 Job Title: VP & CFO
 Administrative contact

Phone: 1 757 244-4000 13
 Mobile: 1 757 652-4564
 Fax: [Dropdown]
 Email: JEROME@JOHNSPLUMBING.COM
 Status: Active

Contact Addresses

Address Name	Address	Phone	Address Purpose	Status
CHESA-120	1200 WATERWAY DRIVE, CHESAPEAKE, VA 23320, Chesapeake...	+1 (757) 233-30...	Ordering	Active

User Account

Request user account

Roles

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking in...

59 OK Cancel

59 Click the **OK** button.

Edit Profile Change Request: 14004

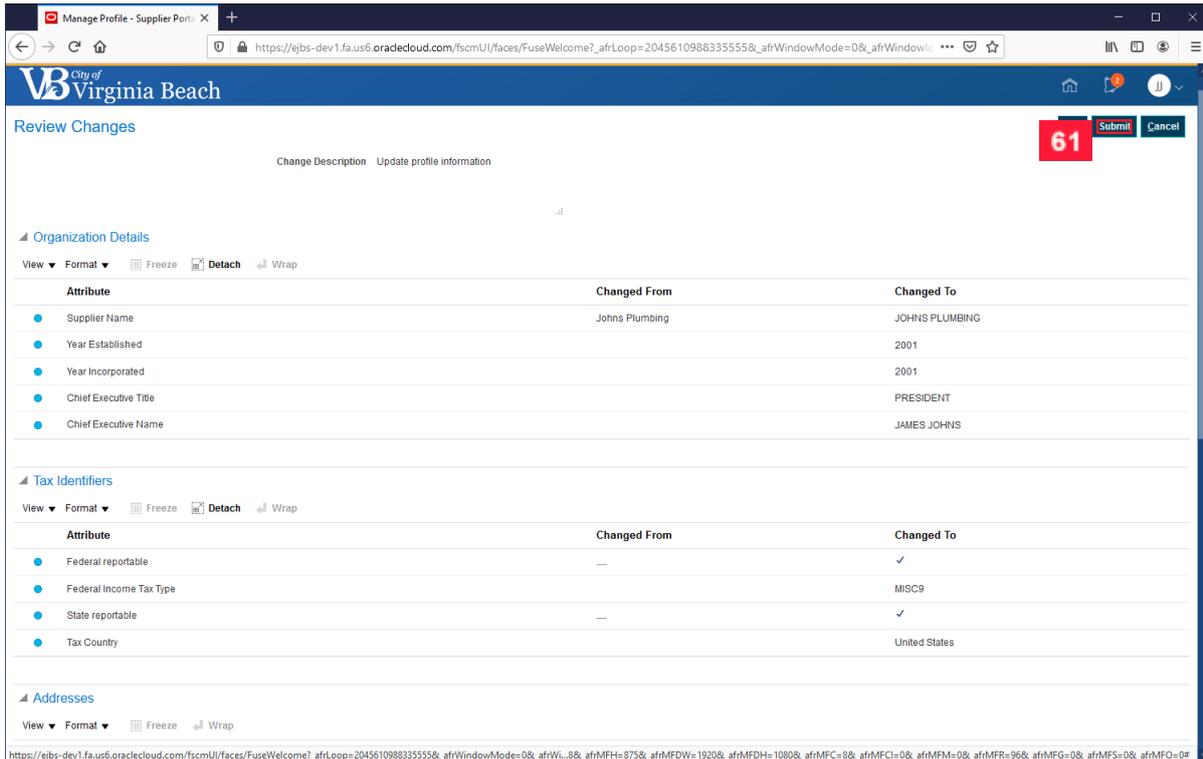
Change Description: Update profile information

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

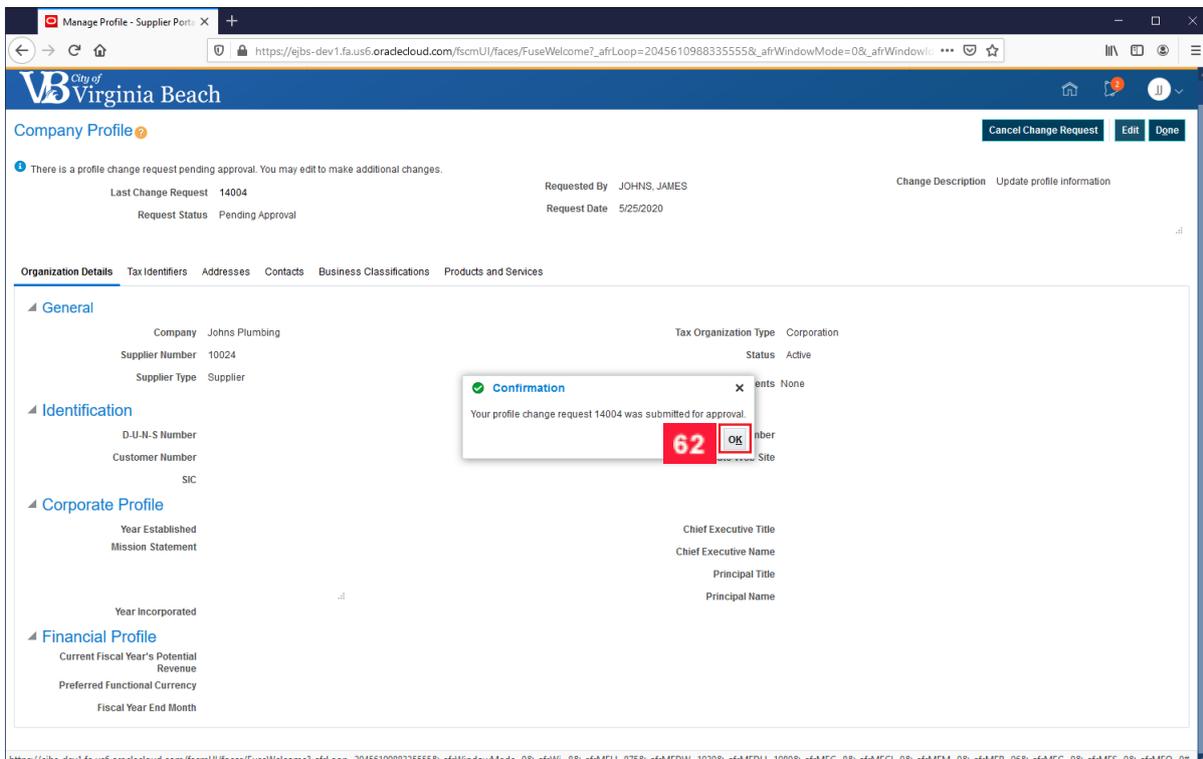
Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
JOHNS, JAMES	PRESIDENT	JAMES@JOHNSPLUMBING.COM	+1 (757) 244-40...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active
JOHNS, JEROME	VP & CFO	JEROME@JOHNSPLUMBING.COM	+1 (757) 244-40...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active

60 Review Changes Save Save and Close Cancel

60 Once again, click the **Review Changes** button.



61 If no additional changes need to be made, select the **Submit** button.



62 A window will appear confirming that your profile change request has been submitted for approval. Click **OK**.

Company Profile

There is a profile change request pending approval. You may edit to make additional changes.

Last Change Request: 14004 | Requested By: JOHNS, JAMES | Change Description: Update profile information
 Request Status: Pending Approval | Request Date: 5/25/2020

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

General

Company	Johns Plumbing	Tax Organization Type	Corporation
Supplier Number	10024	Status	Active
Supplier Type	Supplier	Attachments	None

Identification

D-U-N-S Number	National Insurance Number
Customer Number	Corporate Web Site
SIC	

Corporate Profile

Year Established	Chief Executive Title
Mission Statement	Chief Executive Name
	Principal Title
Year Incorporated	Principal Name

Financial Profile

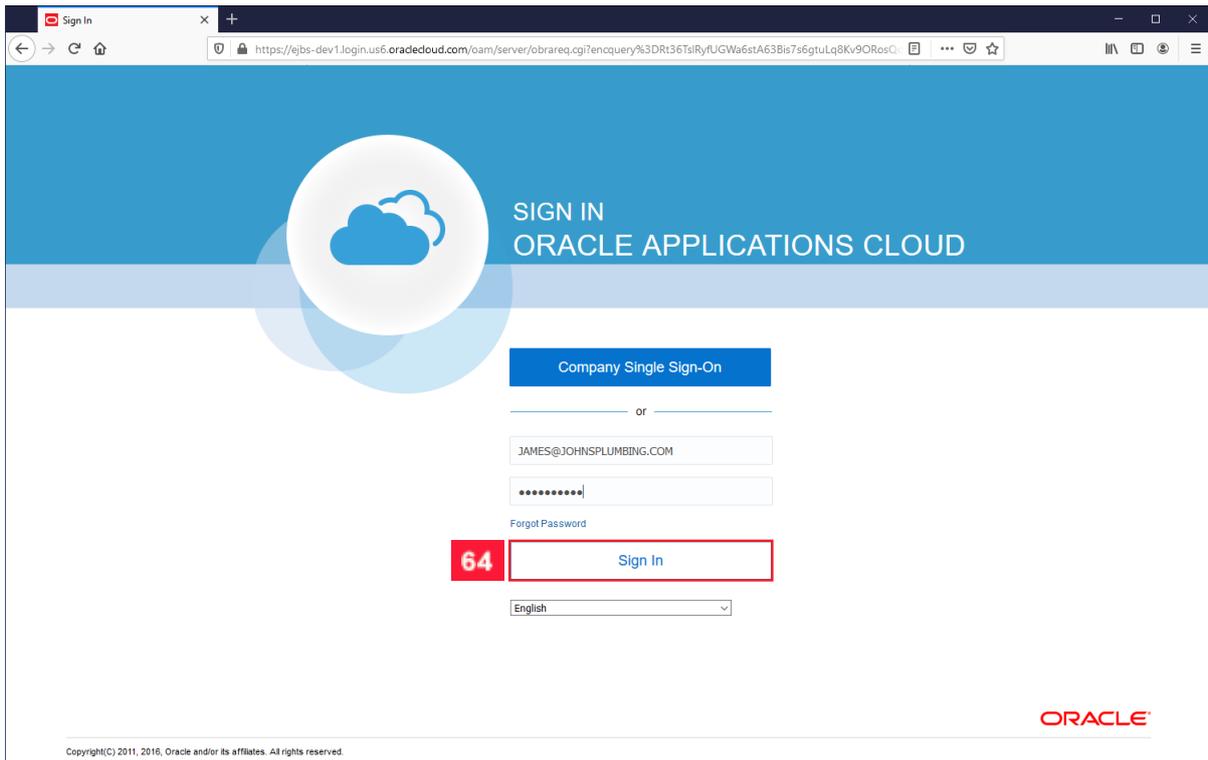
Current Fiscal Year's Potential Revenue
Preferred Functional Currency
Fiscal Year End Month

Cancel Change Request 63 Done

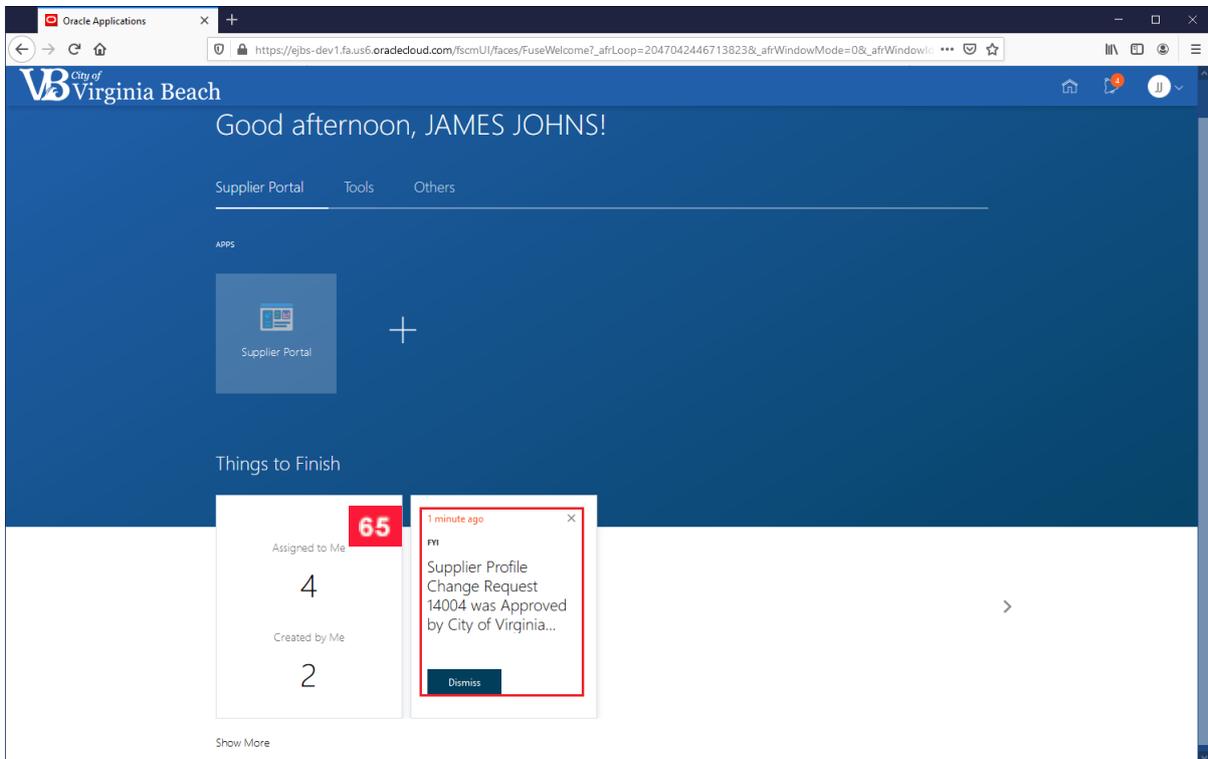
63 Click the **Done** button.

Your change request will be reviewed by the City of Virginia Beach Supplier Portal Team. Once approved, you will receive a notification informing you of its approval. View steps 64-72.

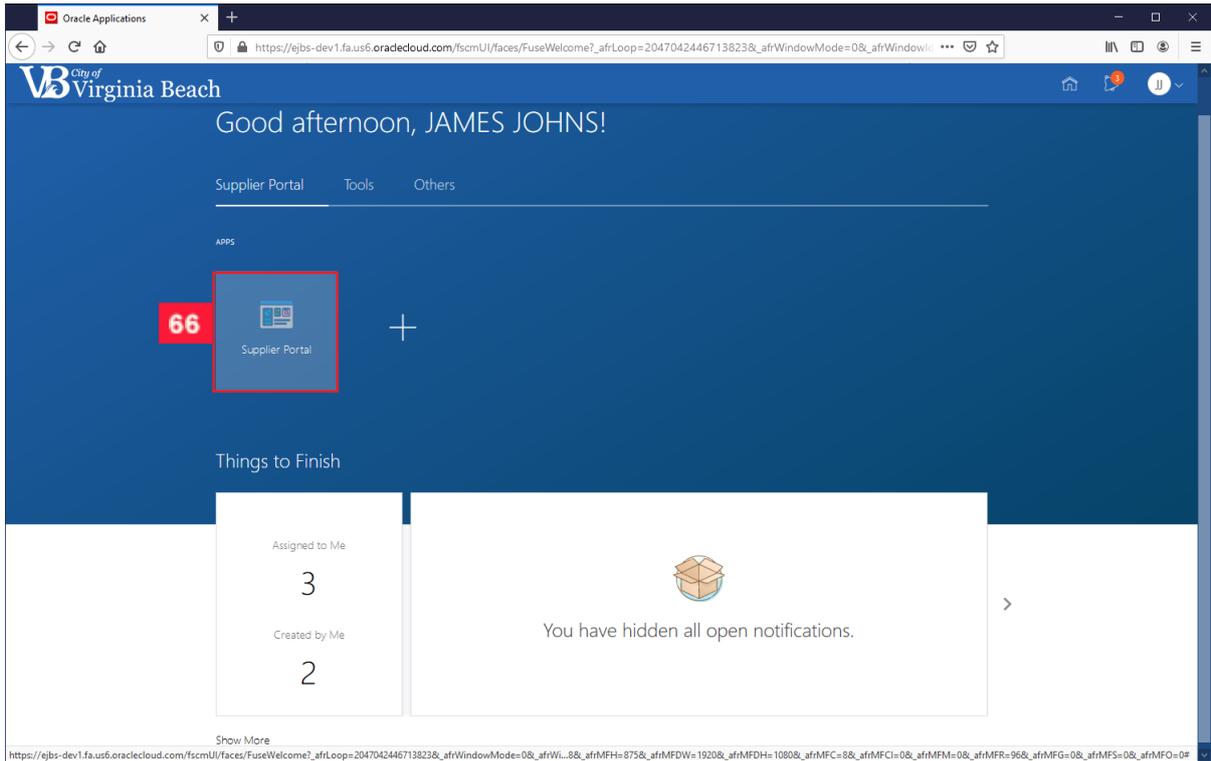
6 View Approval Notification



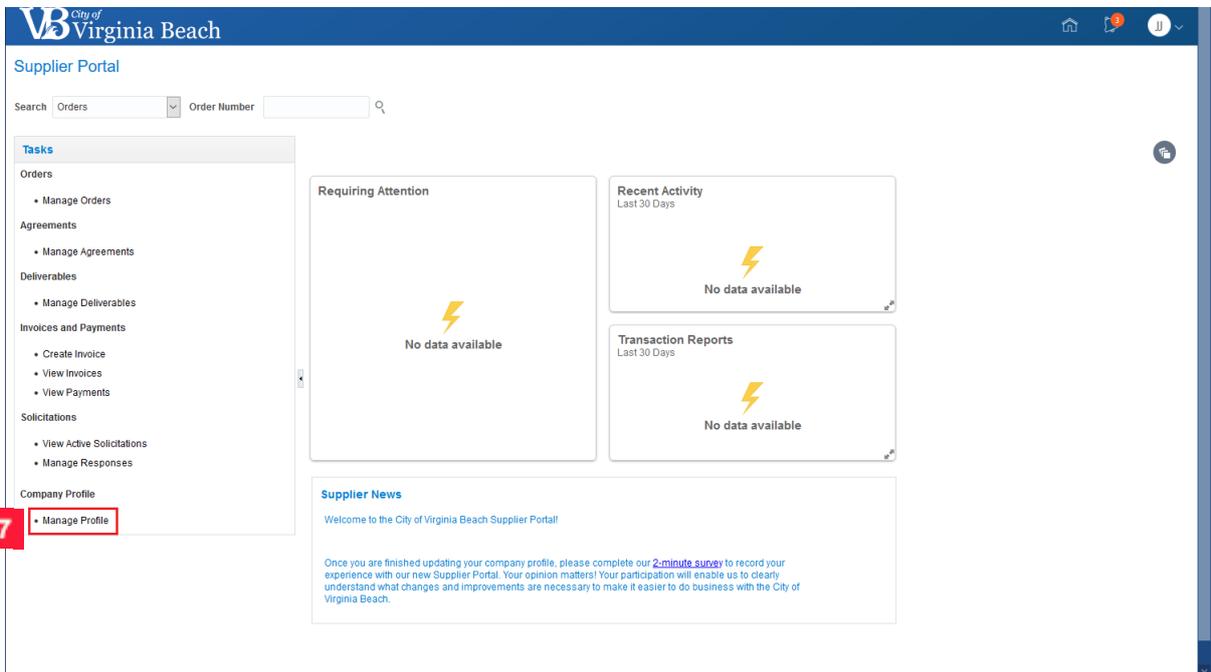
64 Enter your *user ID* in the **User ID** field. Enter your *password* in the **Password** field. Click the **Sign In** button.



65 Notice in the **Things to Finish** section an FYI tile that indicates the Supplier Change Request was Approved. To remove the notification you may click the **Dismiss** button.



66 To view your profile, click the **Supplier Portal** icon.



67 Click the **Manage Profile** link in the Tasks menu.

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

General

Company	JOHNS PLUMBING	Tax Organization Type	Corporation
Supplier Number	10024	Status	Active
Supplier Type	Supplier	Attachments	None

Identification

D-U-N-S Number		National Insurance Number	
Customer Number		Corporate Web Site	
SIC			

Corporate Profile

Year Established	2001	Chief Executive Title	PRESIDENT
Mission Statement		Chief Executive Name	JAMES JOHNS
		Principal Title	
		Principal Name	
Year Incorporated	2001		

Financial Profile

Current Fiscal Year's Potential Revenue	
Preferred Functional Currency	
Fiscal Year End Month	

https://ejbs-dev1.fa.us6.oraclecloud.com/fscm/UI/faces/FuseWelcome?_afrcLoop=2047042446713823&_afrcWindowMode=0&_afrcWi...8&_afrcMFH=875&_afrcMFDW=1920&_afrcMFDH=1080&_afrcMFC=8&_afrcMFCI=0&_afrcMFM=0&_afrcMFR=96&_afrcMFG=0&_afrcMFS=0&_afrcMFO=0

68 Click on the tabs to review your profile details.

69 Edit Done

Last Change Request 14004 Requested By JOHNS, JAMES Change Description Update profile information
Request Status Processed Request Date 5/25/2020

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

View Format Freeze Detach Wrap

Category Name	Description
Product Categories > 670 - PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES	PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES

https://ejbs-dev1.fa.us6.oraclecloud.com/fscm/UI/faces/FuseWelcome?_afrcLoop=2047042446713823&_afrcWindowMode=0&_afrcWi...8&_afrcMFH=875&_afrcMFDW=1920&_afrcMFDH=1080&_afrcMFC=8&_afrcMFCI=0&_afrcMFM=0&_afrcMFR=96&_afrcMFG=0&_afrcMFS=0&_afrcMFO=0

69 When finished, click **Done**.

7 Supplier Portal Support

You have successfully updated your Supplier Profile in Supplier Portal. If you have questions or need additional assistance please contact us at SupplierPortal@vbgov.com or (757) 385-4438.