

# Manage Addresses and Contacts

## Navigation

<http://procurement.umich.edu/supplier-resources/supplier-portal>

## Description

Supplier users may submit requests to add and modify addresses and contacts. This job aid describes how to manage contact and address information.

## Supplier Portal



1. Click on the **Manage Profile** tile.

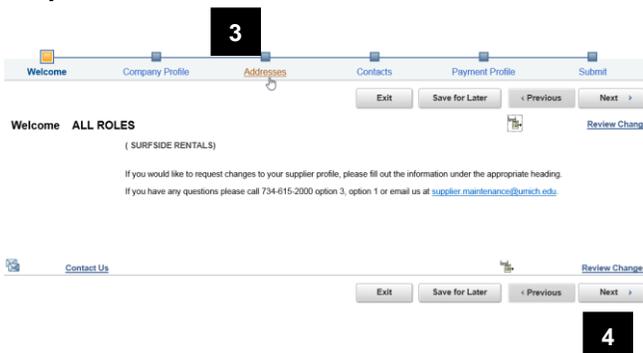
**Note:** For login instructions, refer to *Logging into the eSettlements Supplier Portal*. For more information on the Supplier Portal options, refer to the *Navigate the Supplier Portal* job aid.

## Supplier Change Request



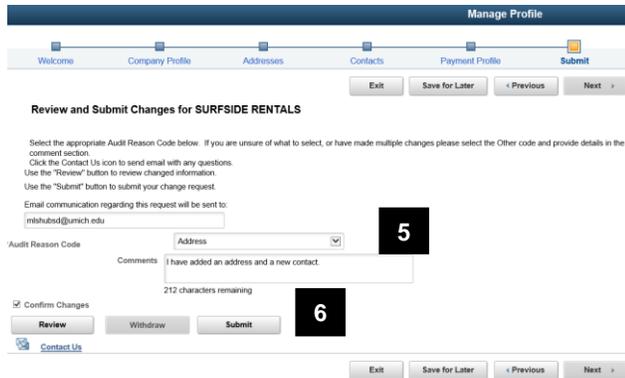
2. Click Supplier Change Request.

## Request Screen



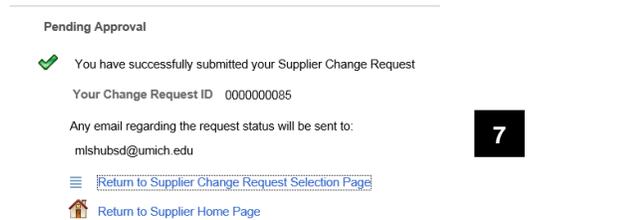
3. From the request screen you may update your company profile, addresses, contacts, and your payment profile. Whether you choose to modify an address or all of the above, you must be sure to **submit** your requested changes for your supplier profile.
4. To navigate you may utilize the Next button at the bottom of the page, or you may click directly on the item that you would like to review or update.

## Review and Submit Changes



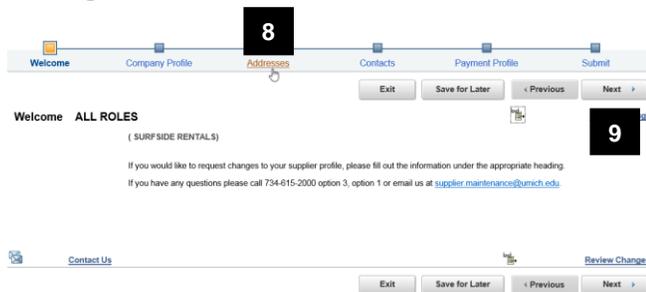
- To submit your changes you will be required to select the audit reason code from a drop down list of options:  
Address  
Contact Information  
Name Change  
Other or Multiple Changes  
Payment
- You should also add a comment explaining your requested changes, and check Confirm Changes, then click the submit button.

## Supplier Change Request Submit Confirmation



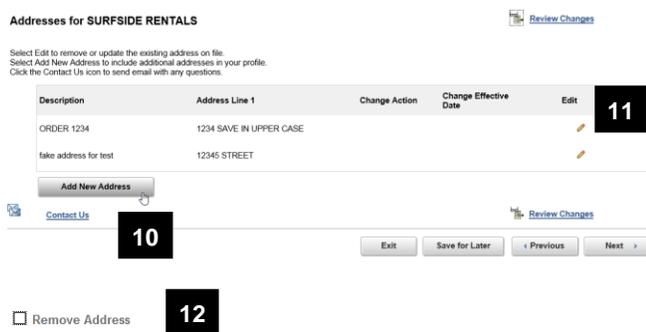
- You will receive a confirmation screen after properly submitting a change request.

## Manage Addresses



- To manage addresses, you may click Addresses in the tool bar.
- You may also advance to the addresses page by clicking Next until you reach the appropriate page.

## Add or Edit Addresses



Description	Address Line 1	Change Action	Change Effective Date	Edit
ORDER 1234	1234 SAVE IN UPPER CASE			
fake address for test	12345 STREET			

- You may add a new address by clicking the Add New Address button.
- To edit an existing address, click the little pencil icon for the appropriate line. (Please only use edit address for typos)
- To remove an existing address, click the little pencil icon to view the address. Then check the Remove Address check box in the upper left corner, and click **OK**.

## Address Information

Address Information for SURFSIDE RENTALS

**Address Information**

Description: TEST ADDRESS **13**

Country: USA  United States

Address Line 1: 1234567890 Street

Address Line 2:

Address Line 3:

City: Ann Arbor **14**

Zip Code: 48100

State: MI  Michigan

Email ID:  **15**

**Phone Information**

Phone Type	Location	Profile	Telephone	Extension
Business Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**16**

Approved Changes Take Effect:  Approval Date  Future Date **17**

**18**

13. In the **Description** box, enter an address description.
14. In the **Country, Address 1, Address 2, Address 3, City, State, and Zip Code** boxes, enter the appropriate address information. (Country must be USA)
15. In the **Email ID** box, enter an email address (optional).
16. In the **Phone Information** table, enter a business phone number. Click **Add Phone** to enter additional phone numbers.
17. Please note that you may designate an address change to take effect on the approval date or a specified future date by selecting the appropriate radio button.
18. Click **OK** when you are done.

## Add or Edit Contacts

Welcome Company Profile Addresses **Contacts** Payment Profile Submit

Contacts for SURFSIDE RENTALS

Select Edit to remove or update the existing contact information.  
Select Add New Contact to include additional contacts in your profile.  
Click the Contact Us icon to send email with any questions.

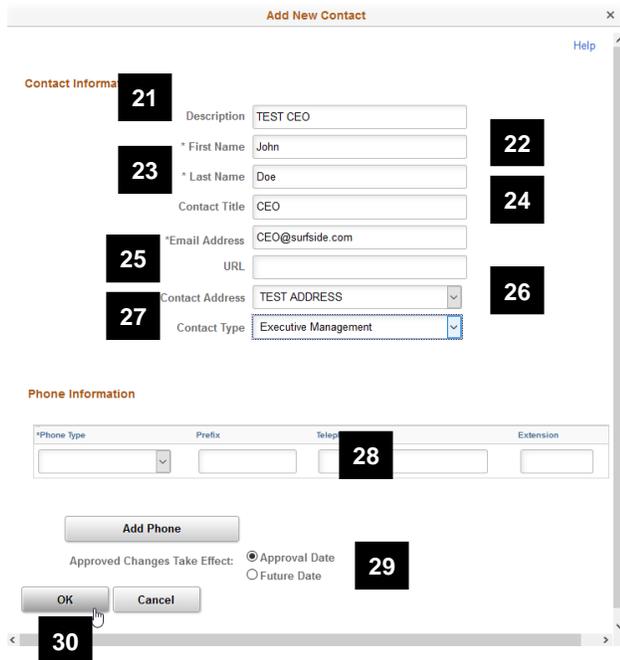
Name	Address	Change Action	Change Effective Date	Edit
John Doe	ORDER 1234	<input type="checkbox"/>		<input type="button" value="Edit"/> <b>20</b>

**19**

19. After navigating to contacts, you may add a new contact by clicking the Add New Contact button.
20. To edit an existing contact, click the little pencil icon for the appropriate line.

To remove an existing contact, click the little pencil icon to view the contact (not shown). Then check the Remove Contact check box in the upper left corner, and click **OK**.  Remove Contact

### Contact Information

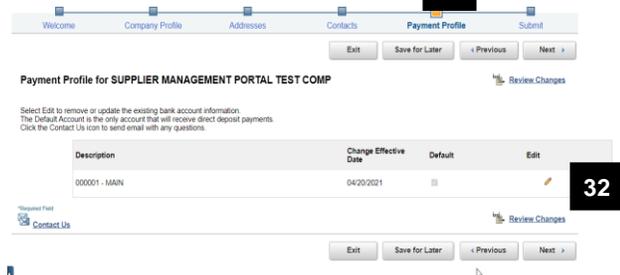


The screenshot shows the 'Add New Contact' form with the following fields and callouts:

- 21**: Description (TEST CEO)
- 22**: First Name (John)
- 23**: Last Name (Doe)
- 24**: Contact Title (CEO)
- 25**: Email Address (CEO@surfside.com)
- 26**: Contact Address (TEST ADDRESS)
- 27**: Contact Type (Executive Management)
- 28**: Phone Number (in the Phone Information section)
- 29**: Approved Changes Take Effect (radio buttons for Approval Date and Future Date)
- 30**: OK button

21. In the **Description** box, type a contact description (optional).
22. In the **First Name** box, type the contact's first name.
23. In the **Last Name** box, type the contact's last name.
24. In the **Contact Title** box, type the contact's official title. (optional)
25. In the **Email ID** and **URL** boxes, type an email address and URL (optional).
26. Select the appropriate **Contact Address** from the drop-down box. (optional)
27. Select the appropriate **Contact Type** from the drop-down box. (optional)
28. In the **Phone Information** table, enter a business phone number. Click **Add Phone** to enter additional phone numbers.
29. Please note that you may designate a contact change to take effect on the approval date or a specified future date by selecting the appropriate radio button.
30. Click **OK** when you are done.

### Payment Profile



The screenshot shows the 'Payment Profile' page for 'SUPPLIER MANAGEMENT PORTAL TEST COMP'. It includes a table with the following data:

Description	Change Effective Date	Default	Edit
000001 - MAIN	04/20/2021	<input type="checkbox"/>	

Callouts: **31** points to the 'Payment Profile' tab, and **32** points to the pencil icon in the table.

31. After navigating to Payment Profile, you can manage banking information.
32. To add or modify banking information, click on pencil icon

Payment Profile for 000001 - MAIN

[Expand All](#) [Collapse All](#)

▼ Attachments

[Attachments](#)

▼ Bank Accounts

Default	Beneficiary Bank	Bank ID Number	Branch N
<input checked="" type="checkbox"/>			

Add Bank Account

33

OK

Cancel

33. To add banking info, click on Add Bank Account

▼ Bank Accounts

Default	Beneficiary Bank	Bank ID Number	Branch Name	Bank Account #	Edit
<input checked="" type="checkbox"/>	DUMMY BANKING	124085066		XXXXX6789	

Add Bank Account

OK

Cancel

34

34. If Bank Account exists, click on pencil icon to make changes

NOTE: There can only be one bank account on file so if one exists, please edit the current information.

Please go back up to step 5 to see steps for reviewing and submitting change request.