



SUPPLIER REGISTRATION

Updating Supplier Information Guide

Abstract

This job aide will show you how to update Supplier information.

PPL Supplier Enablement Team

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Overview

Infor serves as the modern solution for work management, contract, and invoice processing. This document is intended to provide you with a step-by-step guidance on how to update Supplier information.

By reading this document at its entirety you will be able to:

- Update Supplier Profile
- Update Diversity Codes
- Update Certifications
- Update Proxy Notifications
- Add/Update Banking Info

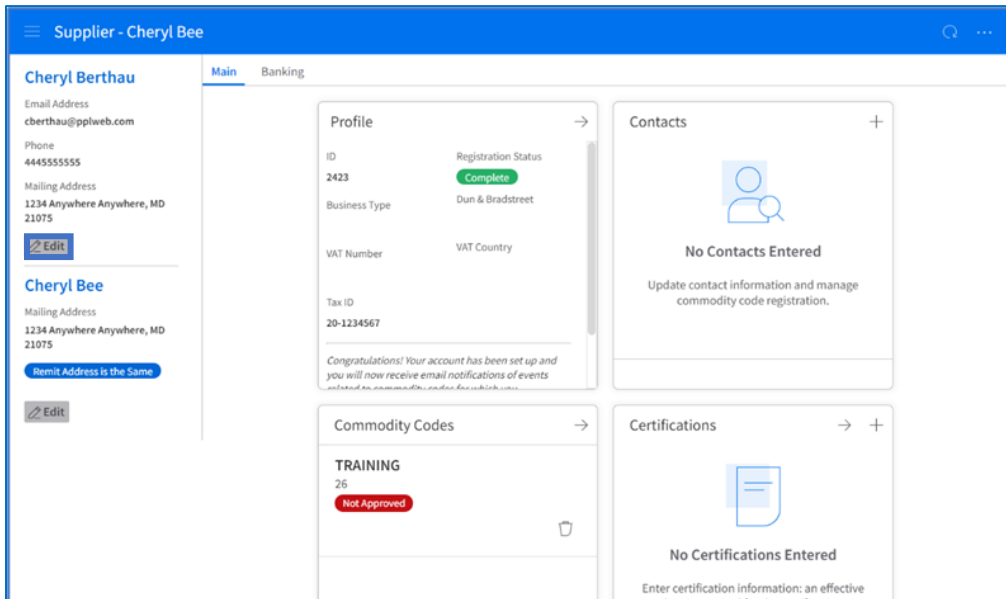
Updating Supplier Information

1. Enter the Username and Password.
2. Click Sign In.
Note: If the **Supplier Portal** menu is visible, skip to step 4
3. Click on the Toggle menu.
4. Click My Account

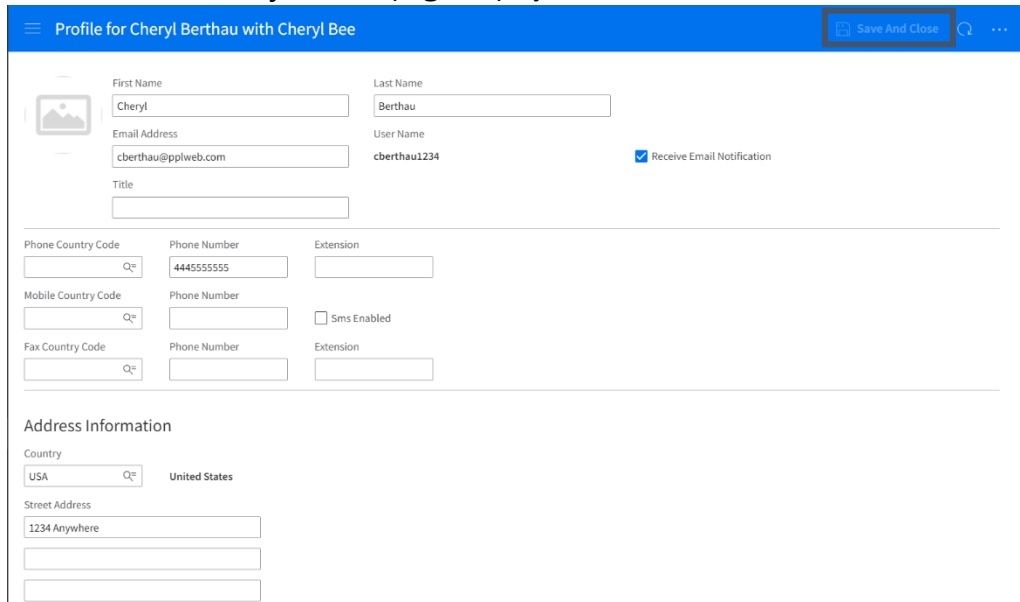
Updating Supplier Profile

Updating the primary contact profile

1. Click the **Edit** button.



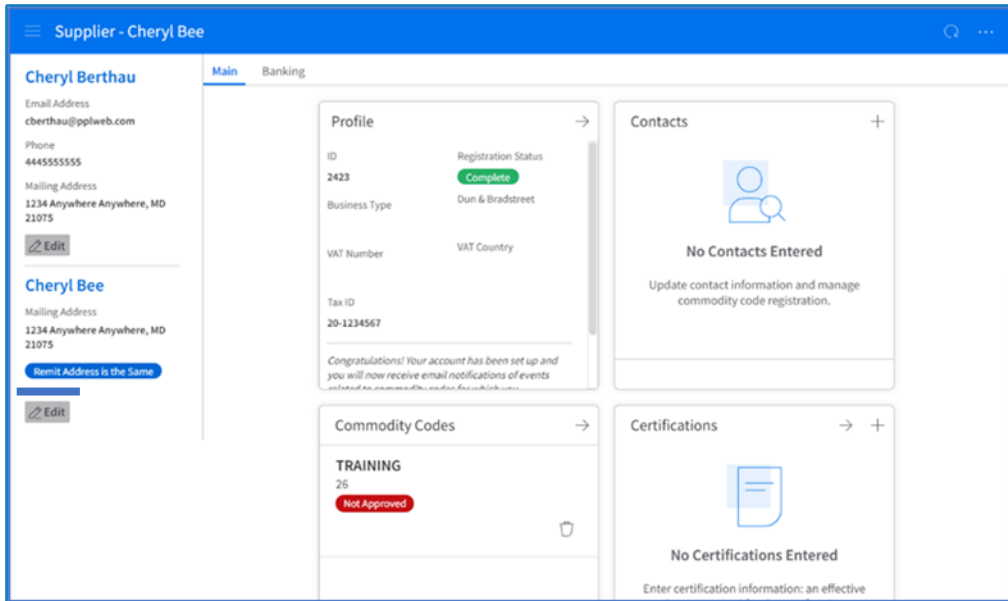
The Profile for Primary Contact page displays.



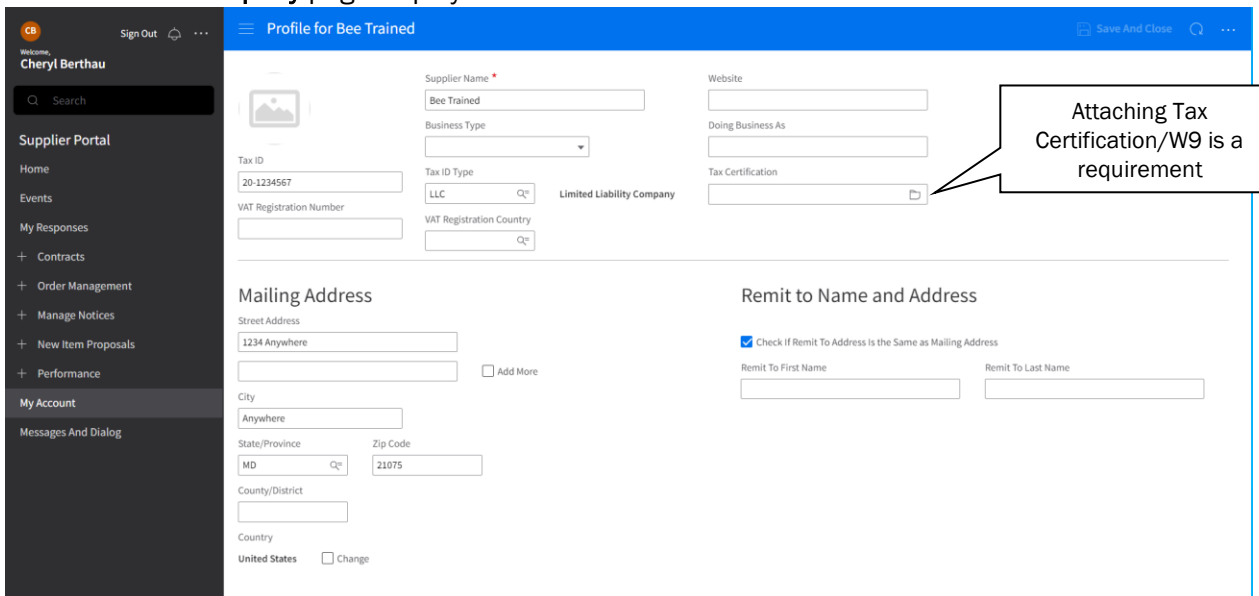
2. Edit fields as necessary.
3. Click **Save And Close**.

Updating the company profile

1. Click the Edit button.



The Profile for Company page displays

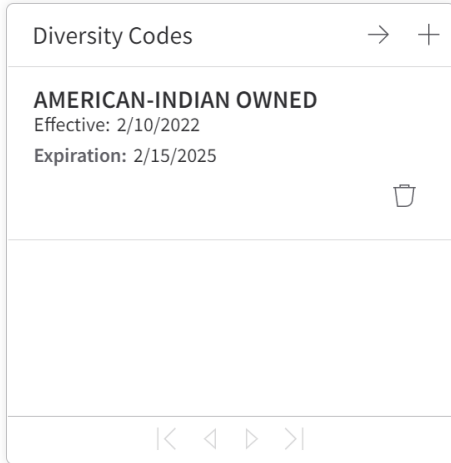


2. Edit fields as necessary.
Note: Attaching the Tax Certification/W-9 is required.
3. Click **Save and Close**.

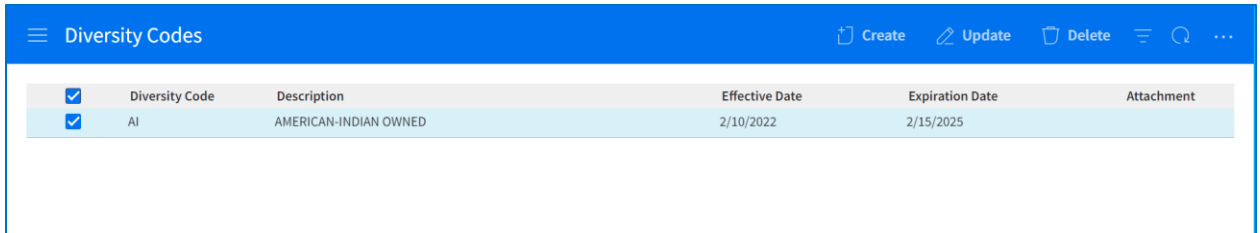
Updating Diversity Codes

Note: You may need to scroll down to view this block.

1. Select the diversity code description and select the **Left** arrow.
Note: You can also double-click on the diversity code description

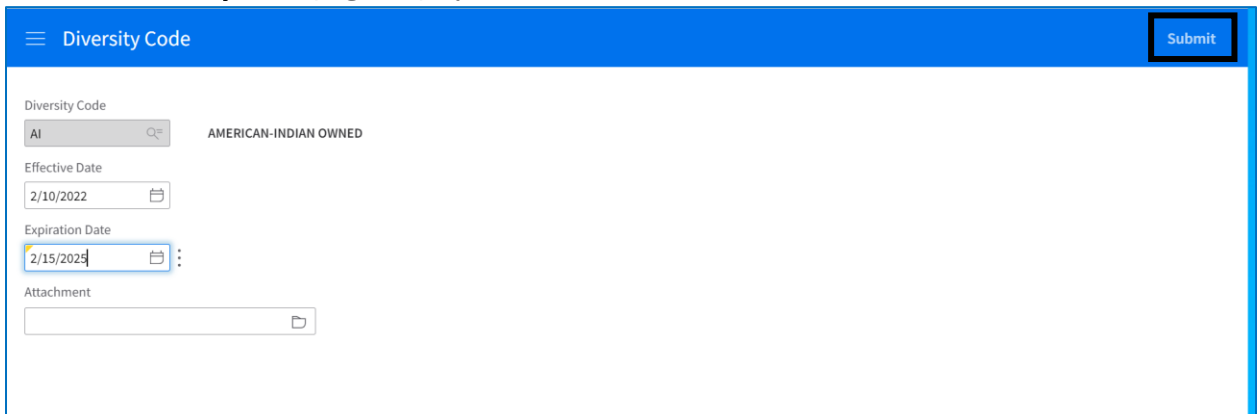


The Diversity Codes list page displays.



2. Select the Diversity Code from the list.
3. Select **Update**.

Note: The Diversity Code page displays.

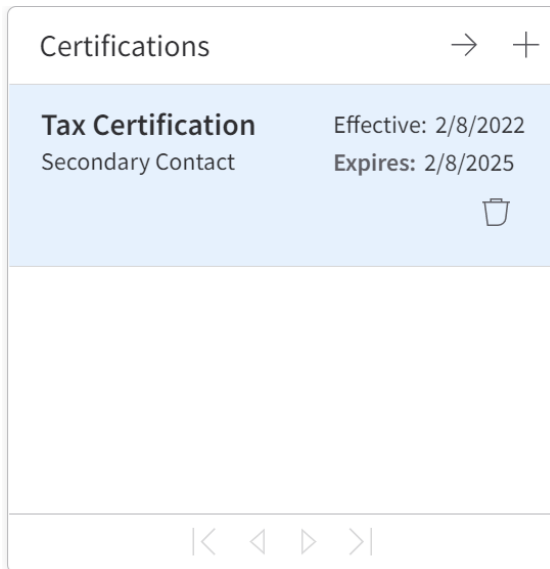


4. Update the necessary fields.
5. Click **Submit**.
6. Click **My Account** to return to the **Main** tab.

Updating Certifications

This section is required to enter W9's, use these steps to update.

1. Select the certification and click the Left arrow.
Note: You can also double-click on the certification



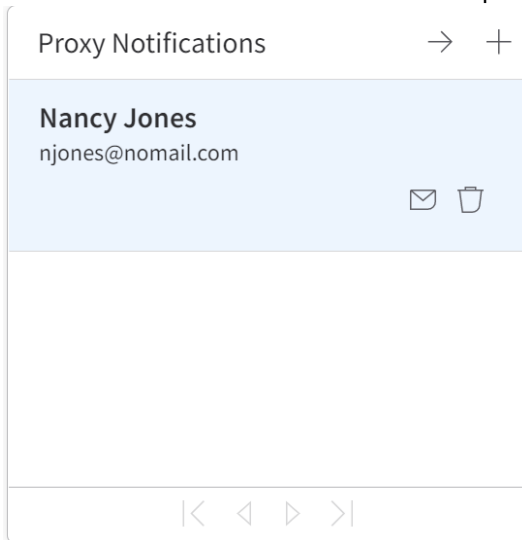
The **Certification** window displays

A screenshot of a "Certification" form. The form is titled "Certification" and contains several fields. The "Supplier" field is labeled "Name" and has the value "3066" and "SIT Test Supplier 1" below it. The "Contact" field has the value "2" and is labeled "Secondary Contact". The "Certification Code" field has the value "TCERT" and is labeled "Tax Certification". The "Effective Date" field has the value "2/8/2022" and the "Expiration Date" field has the value "2/8/2025". There is an "Attachment" field with a folder icon. At the bottom left, there is a checked checkbox labeled "Active". At the bottom, there are two buttons: "Cancel" and "Submit".

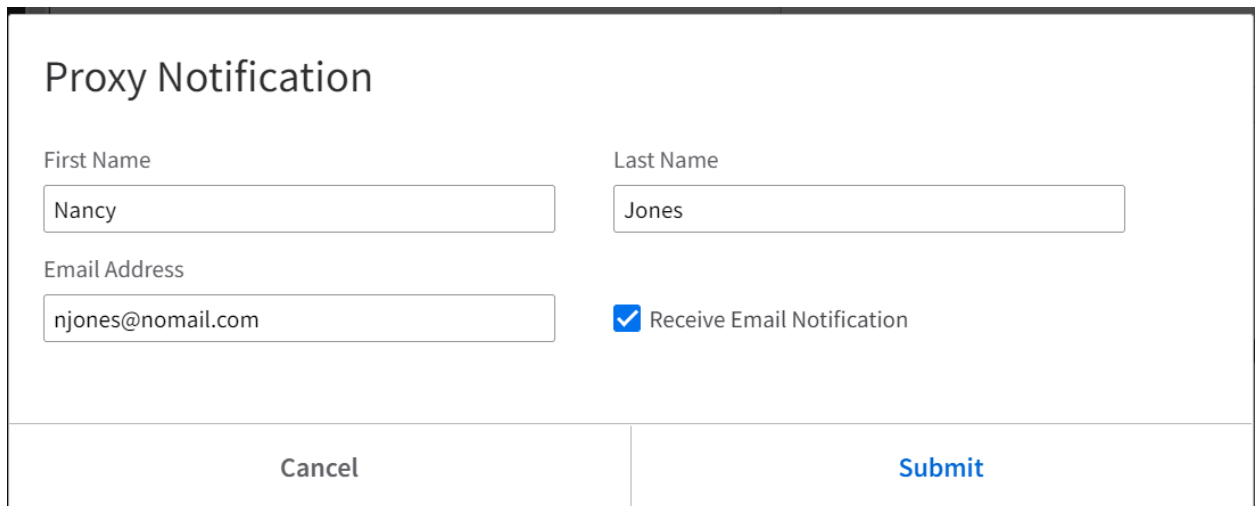
2. You can edit the following fields:
 - Expiration Date
 - Attachment
3. Click **Submit**.
4. Click **My Account** to return to the **Main** tab.

Updating Proxy Notifications

1. Select the proxy name and click the **Left** arrow.
Note: You can also double-click on the proxy name



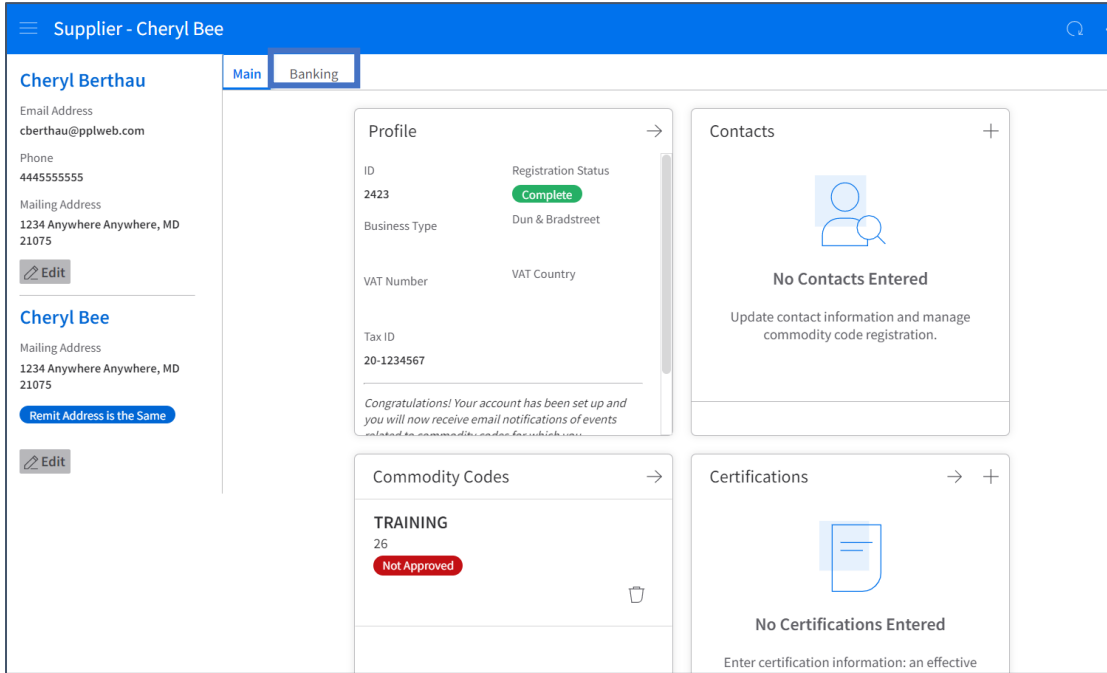
The Proxy Notification window displays

A screenshot of a "Proxy Notification" form. The form has a title "Proxy Notification" at the top. Below the title, there are four input fields: "First Name" with the value "Nancy", "Last Name" with the value "Jones", "Email Address" with the value "njones@nomail.com", and a checkbox labeled "Receive Email Notification" which is checked. At the bottom of the form, there are two buttons: "Cancel" and "Submit".

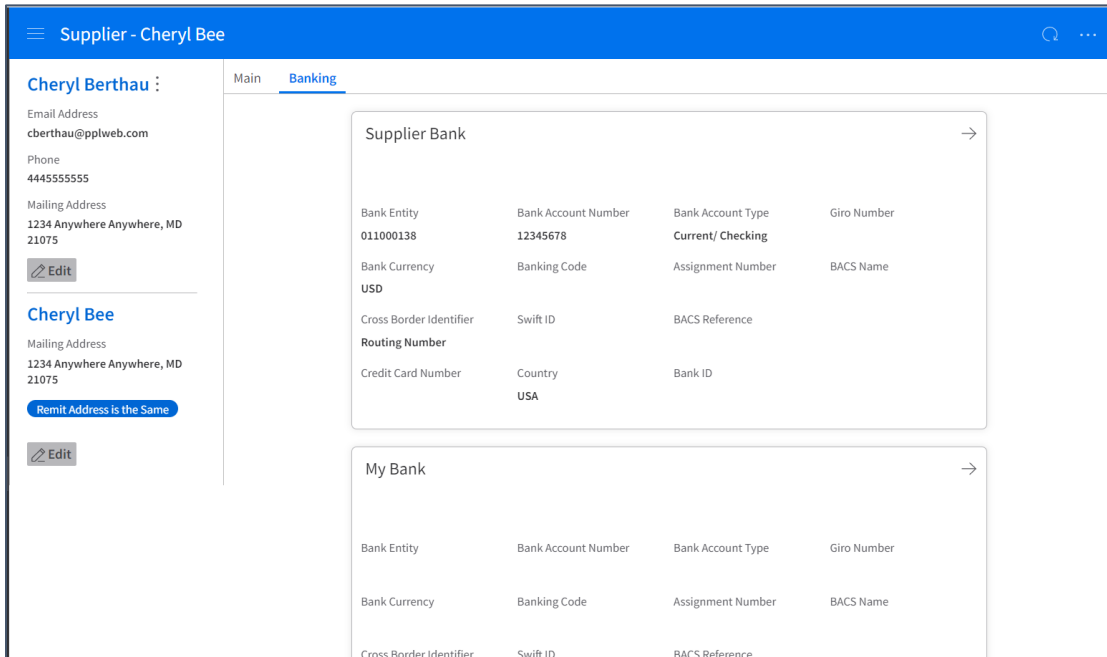
2. Update the necessary fields.
3. Click **Submit**.
4. Click **My Account** to return to the **Main** tab

Adding/Updating Banking Information

1. Click the **Banking** tab.



The Banking tab displays.



2. Click the **Left arrow** in the **Supplier Bank** section.
The **Update Bank Information** page appears.
3. Edit fields as necessary.
 - A. Enter the bank routing or ABA number in the **Bank Entity** field.
 - B. Enter bank account number in the **Bank Account Number** field.
 - C. Select a bank account type from the **Account Type** field.
 - D. Enter bank currency (enter USD for American currency) in the **Currency** field.
 - E. Select Routing Number from the **Cross Border Identifier** field.

The screenshot shows a web form titled "Update Cheryl Bee's Bank Information". The form is organized into several sections. At the top left, there is a "Country" field with the value "USA" and an "Update Country" button. Below this are three columns of fields. The first column contains "Bank Entity" (value: 011000138, labeled A), "Bank Account Number" (value: 12345678), "Account Type" (value: Current/ Checking, labeled C), "Cross Border Identifier" (value: Routing Number, labeled E), and "BACS Reference". The second column contains "Bank Name", "ID", "Swift ID", "BACS Name", and "Credit Card". The third column contains "Ad Hoc Bank Entity Name", "Currency" (value: USD, labeled D), "Assignment Number", "Giro Number", and "Code". A "Save And Close" button is located in the top right corner of the form.

4. Click **Save And Close**.
5. Click **My Account** to return to the **Main** tab.