Manage Addresses and Contacts

Navigation

http://procurement.umich.edu/supplier-resources/supplier-portal/electronic-settlements > Supplier Portal Login >

Description
Supplier users may submit requests to add and modify addresses and contacts. This job aid describes how the manage contact and address information. Users with the PR EM Supplier Administrator role have the ability to add and modify addresses and contacts.

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.

Create New Request

3. Click Create New Request.
4. 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.

5. 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.

6. 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

7. You should also add a comment explaining your requested changes, and check Confirm Changes, then click the submit button.

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

9. To manage addresses, you may click Addresses in the tool bar.

10. You may also advance to the addresses page by clicking Next until you reach the appropriate page.
Add or Edit Addresses

Addresses for SURFSIDE RENTALS

Select Edit to remove or update the existing address or for New Add New Address to include additional addresses on your profile.

<table>
<thead>
<tr>
<th>Description</th>
<th>Address Line 1</th>
<th>Change Action</th>
<th>Change Effective Date</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORDER 124</td>
<td>123 MAIN STREET</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main address to test</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11. You may add a new address by clicking the Add New Address button.
12. To edit an existing address, click the little pencil icon for the appropriate line.
13. To remove an existing address, click the little pencil icon to view the address (not shown). Then check the Remove Address check box in the upper left corner, and click OK.

Address Information

<table>
<thead>
<tr>
<th>Description</th>
<th>Address Line 1</th>
<th>Change Action</th>
<th>Change Effective Date</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST ADDRESS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Line 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Line 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip Code</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

14. In the Description box, enter an address description.
15. In the Country, Address 1, Address 2, Address 3, City, State, and Zip Code boxes, enter the appropriate address information.
16. In the Email ID box, enter an email address (optional).
17. In the Phone Information table, enter a business phone number. Click Add Phone to enter additional phone numbers.
18. 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.
19. Click OK when you are done.

Add or Edit Contacts

Contacts for SURFSIDE RENTALS

Select Edit to remove or update the existing contact information or Add New Contact to include additional contacts on your profile.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Change Action</th>
<th>Change Effective Date</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>ORDER 124</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20. After navigating to contacts, you may add a new contact by clicking the Add New Contact button.
21. 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.
22. In the **Description** box, type a contact description.
23. In the **First Name** box, type the contact’s first name.
24. In the **Last Name** box, type the contact’s last name.
25. In the **Contact Title** box, type the contact’s official title.
26. In the **Email ID** and **URL** boxes, type an email address and URL (optional).
27. Select the appropriate **Contact Address** from the drop-down box.
28. Select the appropriate **Contact Type** from the drop-down box.
29. In the **Phone Information** table, enter a business phone number. Click **Add Phone** to enter additional phone numbers.
30. 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.
31. Click **OK** when you are done.