

QUICK REFERENCE GUIDE

Updated November 01, 2019

Update Supplier Profile and Information

Company Profile, Address, Contacts, Payment Profile, Categorization

Suppliers registered with the State can update their profile and information on the Supplier Portal by making changes to the company profile, address, contacts, payment profile, and categorization codes. Updates are typically approved within two business days.

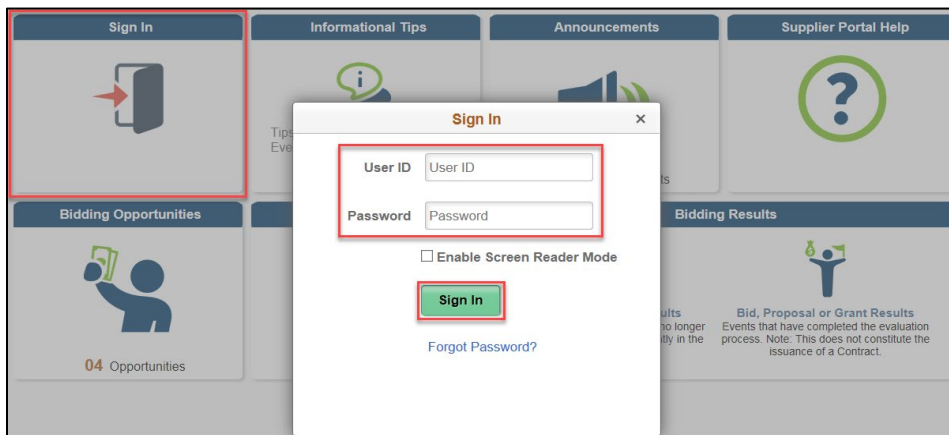
Steps to complete

- Step 1: Log in to the Supplier Portal.
- Step 2: Initiate Supplier Change.
- Step 3: Add/Update Company Profile.
- Step 4: Add/Update Address.
- Step 5: Add/Update Contacts.
- Step 6: Add/Update Payment Profile.
- Step 7: Add/Update Categorization Codes.
- Step 8: Submit Changes to Supplier Information.

Step 1: Log in to the Supplier Portal

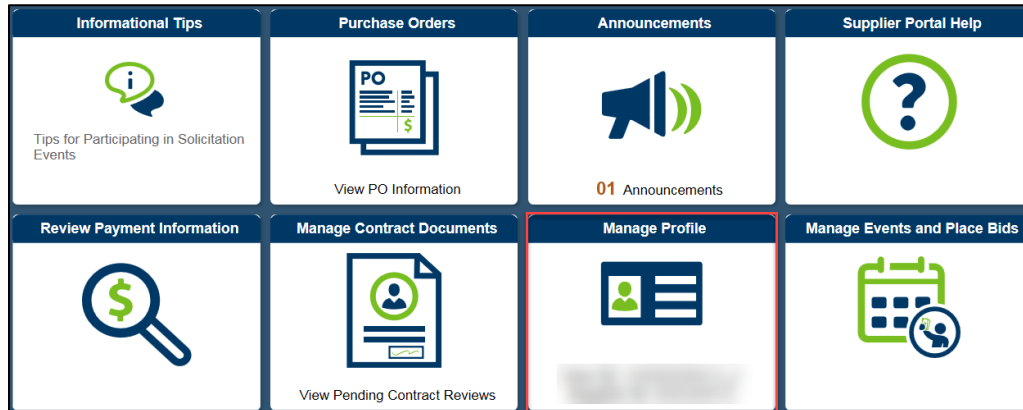
Access the [Supplier Portal](http://mn.gov/supplier) from the following link: <http://mn.gov/supplier>

1. To log in to the Supplier Portal, select the **Sign In** tile.
2. Enter registered supplier information in the *User ID* and *Password* fields.
3. Press the **Sign In** button.

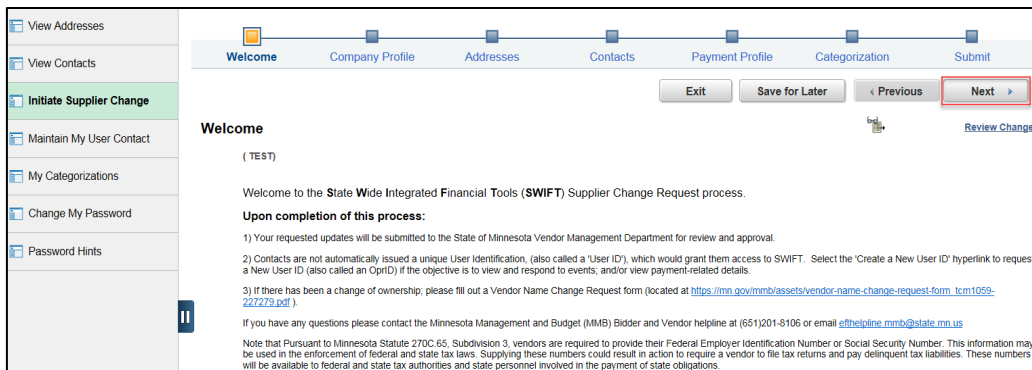


Step 2: Initiate Supplier Change

1. Select the **Manage Profile** tile.



2. On the left-menu, select *Initiate Supplier Change*.
3. The *Welcome* screen for the *Supplier Change Request* process will display. Press the **Next** button.



Step 3: Add/Update Company Profile

1. The *Company Profile* screen will display. Under the *Unique ID & Company Profile*, verify the *Legal Name* is correct, and enter an *Additional Name*, if applicable.
2. Under the *Profile Questions*, press the **Select** button to select an appropriate answer for the first three questions, and select the appropriate radio button (**Yes** or **No**) for the final question.
3. Press the **Next** button.

Company Profile for TEST
Please review and update your Profile Questions, as appropriate.
Note also, some Profile Question responses are now required for submission of a change request.

Unique ID & Company Profile

*Legal Name: TEST
Additional Name: _____

Profile Questions

*Type of Contractor
Not Assigned - Not in List - Declined to Provide [Select]

What were your company's approximate annual sales for last year?
Under 100,000 [Select]

*Number of Employees, (Required for MDHR Reporting Purposes)
1 - 39 employees [Select]

*Has there has been an ownership change within the past two years?
If Yes; please fill out a Vendor Name Change Request form (located at https://mn.gov/mmb/assets/vendor-name-change-request-form_tcm1059-227279.pdf).
 Yes
 No

Step 4: Add/Update Address

1. The *Address* screen will display. Under the *Address*, select the **pencil** icon to edit the supplier's existing address, or press the **Add New Address** button to add a new address to the supplier.

Addresses for TEST

Note: Do not override existing addresses with your new address; as, these requests will be rejected. Instead, add a new address; and, use the comments field to provide details regarding the address(es) that should no longer be considered active.

Edit	Change Action	Change Effective Date	Supplier Location	Address Seq #	Remittance/Invoice Address?	Purchase Order Address?	DBA Name 1	Address Line 1
			001	1	Yes	Yes	TEST	658 CEDAR ST

Add New Address

2. Enter the *Address Information* and *Phone Information* for the supplier contact, and press **OK**.

Address Information for GENERAL - ST PAUL

Address Information

Description: GENERAL - ST PAUL
Address Type: General/Ordering
Address Seq Number: 1 DBA Name 1: TEST
Country: USA United States
Address 1: 658 CEDAR ST
Address 2: 400 CENTENNIAL OFFICE BLDG
Address 3: _____
City: ST PAUL
County: RAMSEY Postal: 55155
State: MN Minnesota

Comments: Requester name, phone number & reason for request
Email ID: Swift_Testing@state.mn.us

Phone Information

Phone Type	Location	Prefix	Telephone	Extension	Remove
Main			651/259-3695		<input type="checkbox"/>

Add Phone

Approved Changes Take Effect: Approval Date Future Date

OK **Cancel**

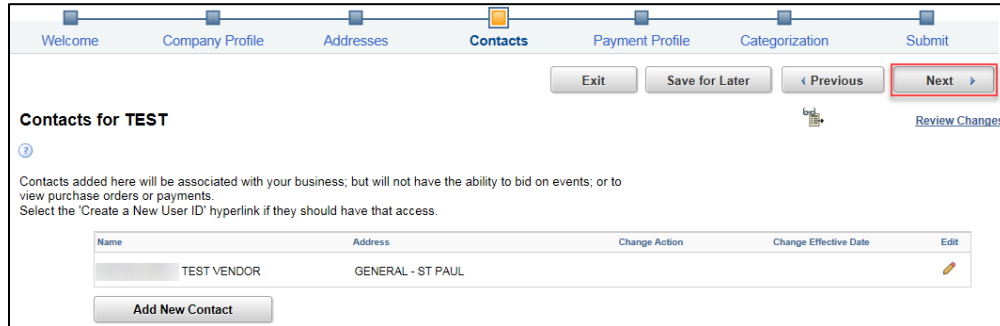
3. Press the **Next** button.

Step 5: Add/Update Contacts

1. The *Contacts* screen will display. Select the **pencil** icon to edit the supplier's existing contact information, or press the **Add New Contact** button to add a new contact to the supplier.

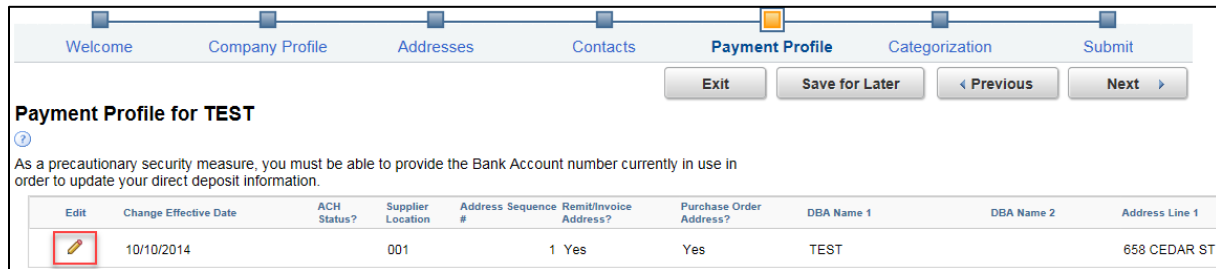
2. Enter the *Contact Information* and *Phone Information* for the supplier contact, and press **OK**.

3. Press the **Next** button.

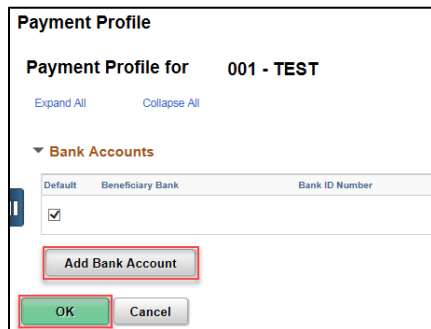


Step 6: Add/Update Payment Profile

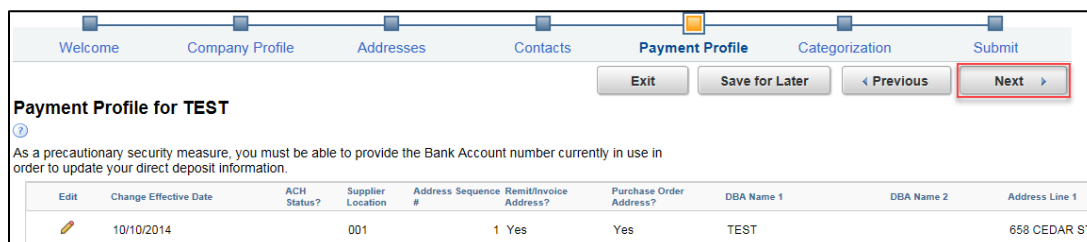
1. The *Payment Profile* screen will display. Select the **pencil** icon to edit the payment profile.



2. Press the **Add Bank Account** button to add or update banking information in the payment profile, and enter required information: Tax ID Number, account information, etc.
3. After updating banking information in the payment profile, press **OK**.



4. Press the **Next** button.



Step 7: Add/Update Categorization Codes

1. The *Categorization* screen will display. To add a UNSPSC Code, enter a keyword in the *Description* field and press the **Search** button.
2. A list of UNSPSC Codes will display as search results. Check mark a box to select the code.
3. Press the **Add Selected** button.

The screenshot shows the 'Categorization for TEST' interface. At the top, there is a search form with a 'Description' field containing 'consulting', an 'And/Or' dropdown menu, and a 'Category' field. A 'Search' button is located below the search fields. Below the search form, the results are titled 'UNSPSC Codes (Search results)'. A table displays the results with columns for 'Selected Flag', 'Category', and 'Description'. The table contains six rows of results. The first five rows have an unchecked checkbox in the 'Selected Flag' column, while the sixth row has a checked checkbox. Below the table, there are two buttons: 'Add Selected' and 'Select All'. The 'Add Selected' button is highlighted with a red box.

	Selected Flag	Category	Description
1	<input type="checkbox"/>	70111704	Horticultural counseling services
2	<input type="checkbox"/>	70171604	Water conservation advisory services
3	<input type="checkbox"/>	70171605	Water rights advisory services
4	<input type="checkbox"/>	71160000	Oil and gas well project management services
5	<input type="checkbox"/>	80151600	International trade services
6	<input checked="" type="checkbox"/>	81101516	Energy or utility consulting service

4. Press the **Next** button.

The screenshot shows the 'Categorization for TEST' interface with a navigation bar at the top. The navigation bar includes tabs for 'Welcome', 'Company Profile', 'Addresses', 'Contacts', 'Payment Profile', 'Categorization', and 'Submit'. The 'Categorization' tab is active. Below the navigation bar, there are buttons for 'Exit', 'Save for Later', '< Previous', and 'Next >'. The 'Next >' button is highlighted with a red box. Below the navigation bar, the search form and results table are visible, identical to the previous screenshot.

Step 8: Submit Changes to Supplier Information

1. The *Submit* screen will display. Enter the supplier contact's email in the *Email communication* field.
2. From the drop-down list in the *Audit Reason Code* field, select the reason for adding/updating the supplier and contact information in SWIFT (e.g., "4 – Contacts Add/Update").

Optional: Specify that reason by writing it in detail in the *Comments* field.

3. Check mark the *Confirm Changes* box.
4. Press the **Submit** button.

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

Exit Save for Later < Previous Next >

Review and Submit Changes for TEST

Please supply a 'Reason Code' from the drop-down list; and include in the comments section any additional details you feel will help to clarify this change request. Use the "Review" button to review changed information. Use the "Submit" button to submit your change request.

Email communication regarding this request will be sent to:

*Audit Reason Code 4-Contacts Add/Update

Comments add contact
243 characters remaining

Confirm Changes

Review Withdraw Submit

5. The *Tax Id Validation* screen will display. Enter the tax identification number in the *Tax ID Number* field, and press **OK**.

Tax Id Validation

Enter Tax Id

Tax Id Number

OK Cancel