SUPPLIER PORTAL

Updating Supplier Information

Abstract
This job aid will show you how to update Supplier information.

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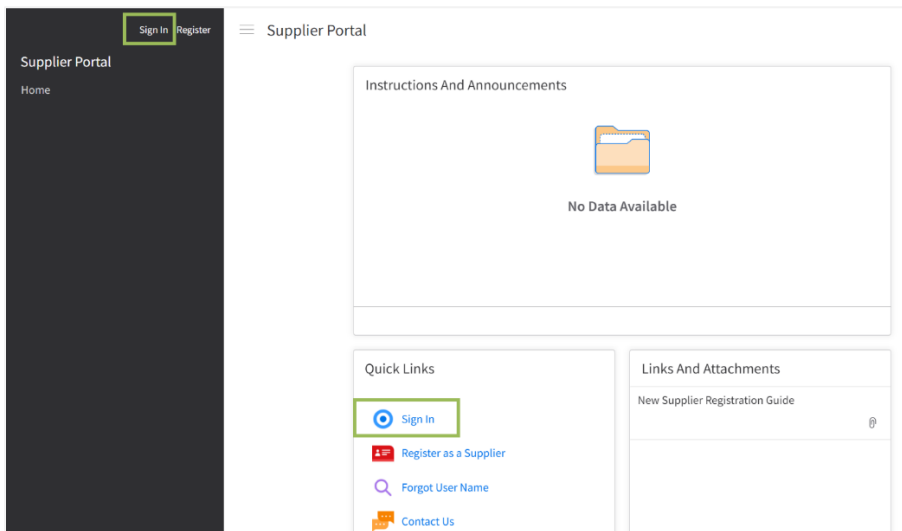
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Overview

Suppliers can maintain their account information, including adding and updating new contacts, diversity codes, certifications, proxy notifications and more. This guide provides step-by-step guidance around updating and maintaining supplier information.

Log into Supplier Portal

You can access the Supplier Portal here.

1. Click **Sign In.**

2. Enter **User Name** and **Password.**
3. Click **Sign In.**

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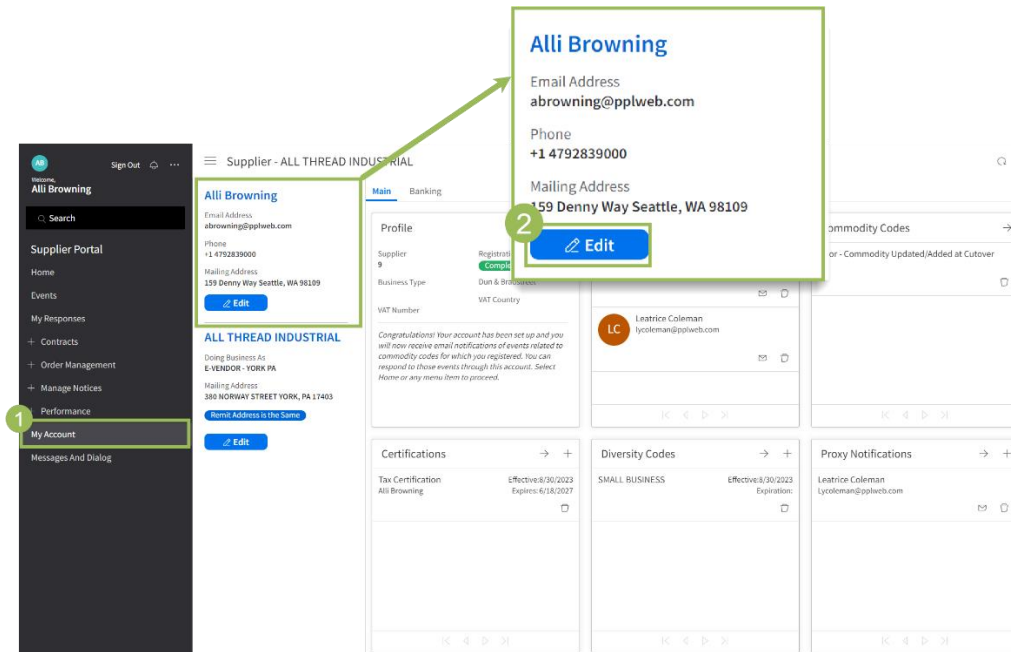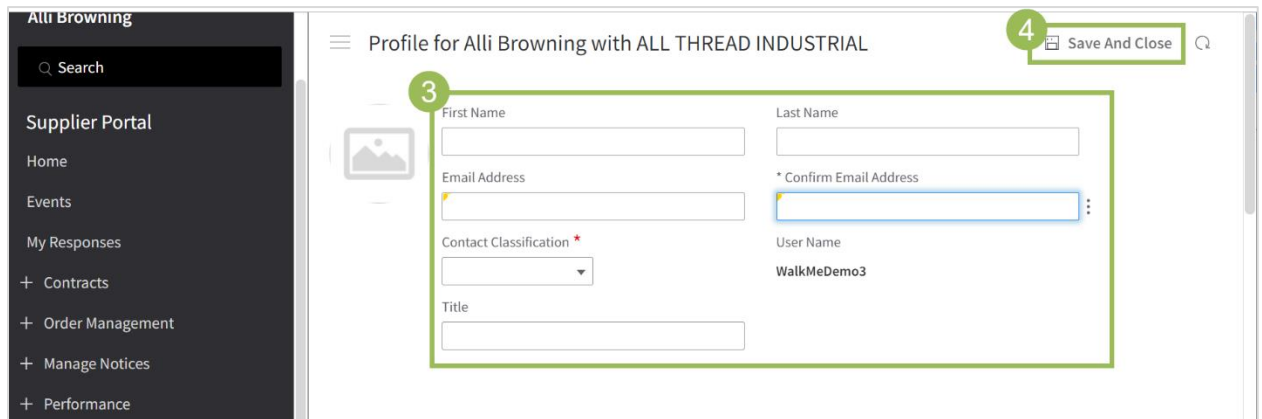
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Maintaining Vendor Contract Profile

PPL Vendors can update their contact information at any time through the Supplier Portal, including name, email address, and title. The section below provides step-by-step guidance around editing and maintaining contact information.

1. In the left-hand menu, click **My Account.**

   NOTE: If you do not see the menu, click the **hamburger icon** ☰ to expand the menu.
2. Under the Contact's name, click **Edit** button.

3. On the **Profile for Primary Contact** page, edit any fields as needed.
4. Click **Save and Close.**

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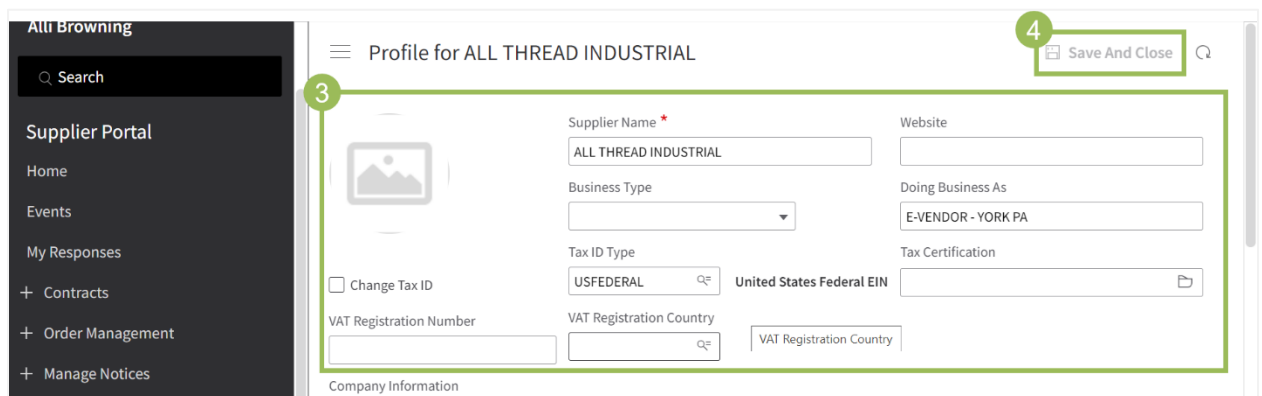Business Use   Page 3

Updating The Company Profile

PPL Vendors are also able to update their Company details through the Supplier Portal at any time, including Supplier Name, website, business type, and VAT details. The section below provides step-by-step guidance around editing and maintaining Company details.

1. In the left-hand menu, click **My Account.**
2. Under the Company name, click **Edit** button.
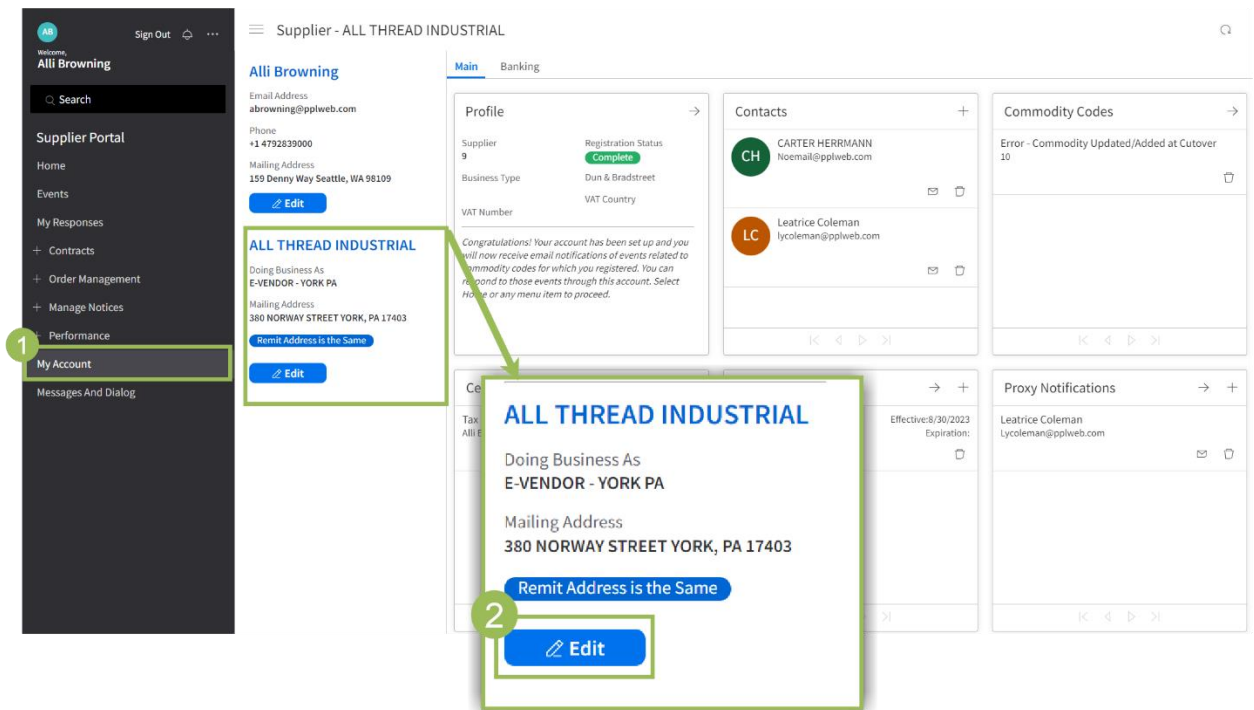
3. On the Profile for Company page, edit any fields as needed.
   NOTE: Tax Certification/W-9 is required to be attached.
4. Click **Save and Close.**

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Maintaining Supplier Diversity Codes

PPL requires that diverse-owned businesses acquire third-party certification to be a part of our supplier diversity program. Follow the steps provided below to add or update the Diversity Code registration.
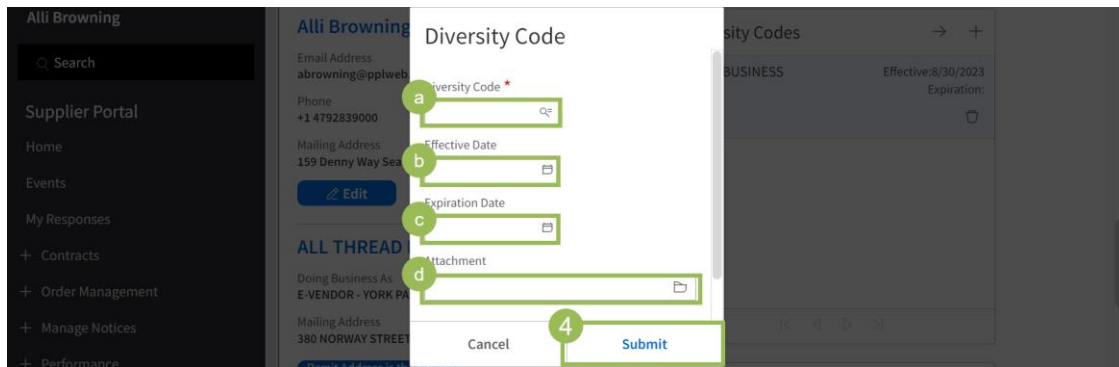
Adding Diversity Codes:
1. In the left-hand menu, click my **Account**.
2. On the **Diversity Code** card, click the **Plus** icon (+).
   NOTE: You may need to scroll down the screen to find the Diversity Code card.
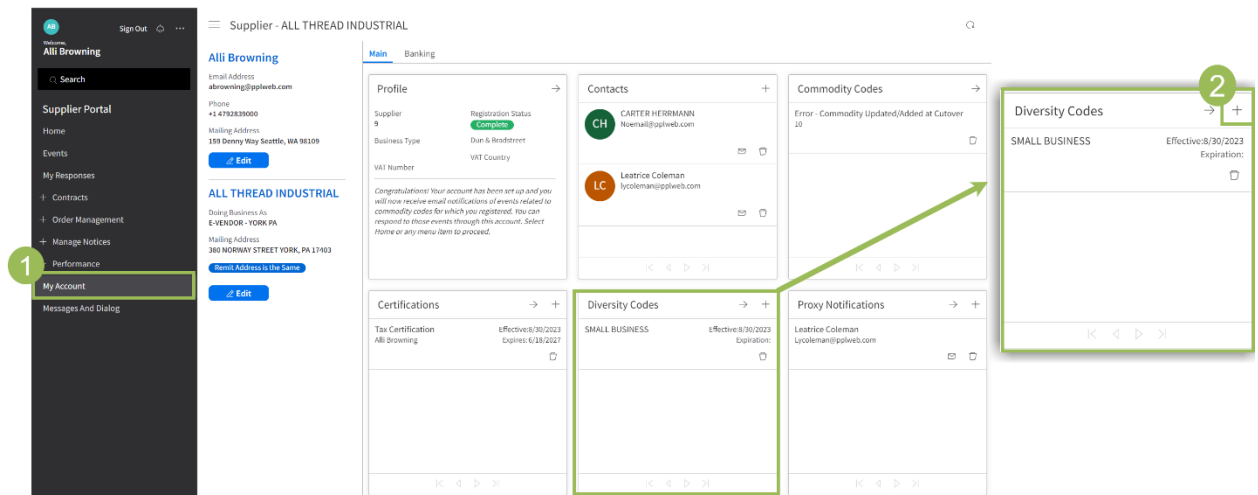
3. Complete the following fields:
   a. **Diversity Code:** Select a code from the list,
   b. **Effective Date:** Enter the effective date (start date).
   c. **Expiration Date:** Enter the expiration date (end date)
   d. **Attachment**: Attach current 3rd Part Certification.
4. Click **Submit**.

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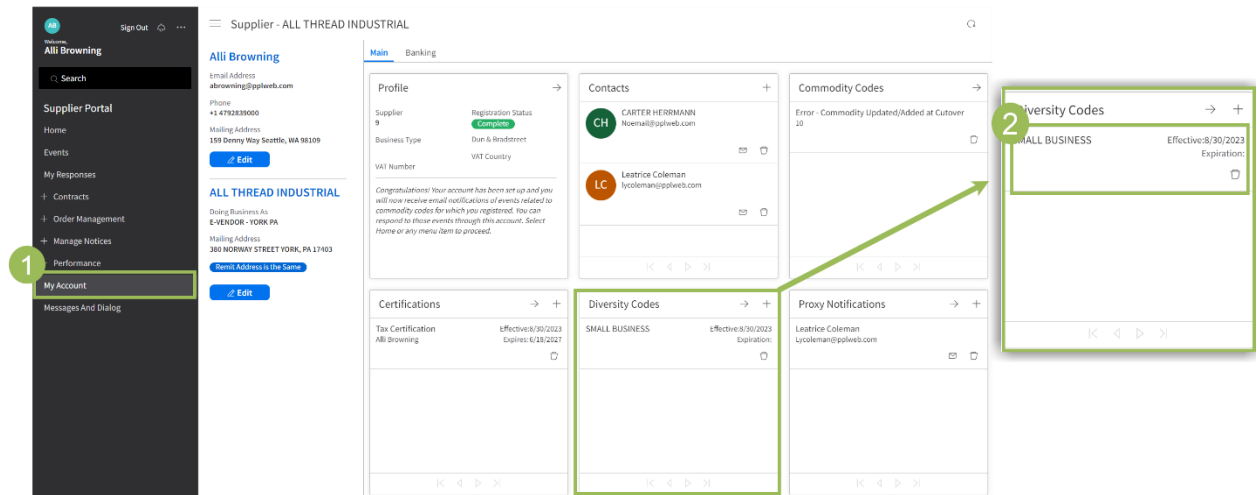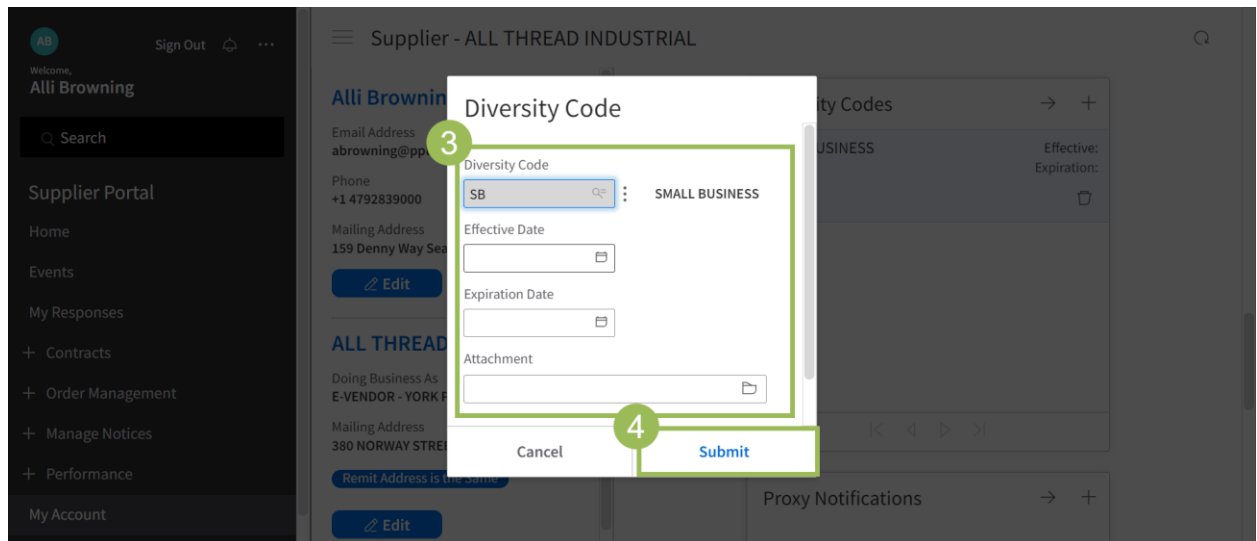Business Use   Page 5

Updating Existing Diversity Codes

1. In the left-hand menu, click **My Account.**
2. To update Diversity Codes, double click the **Diversity Code.**
   NOTE: You may need to scroll down the screen to find the Diversity Code card.

3. Update **Diversity Code** details as needed.
4. Click **Submit**.

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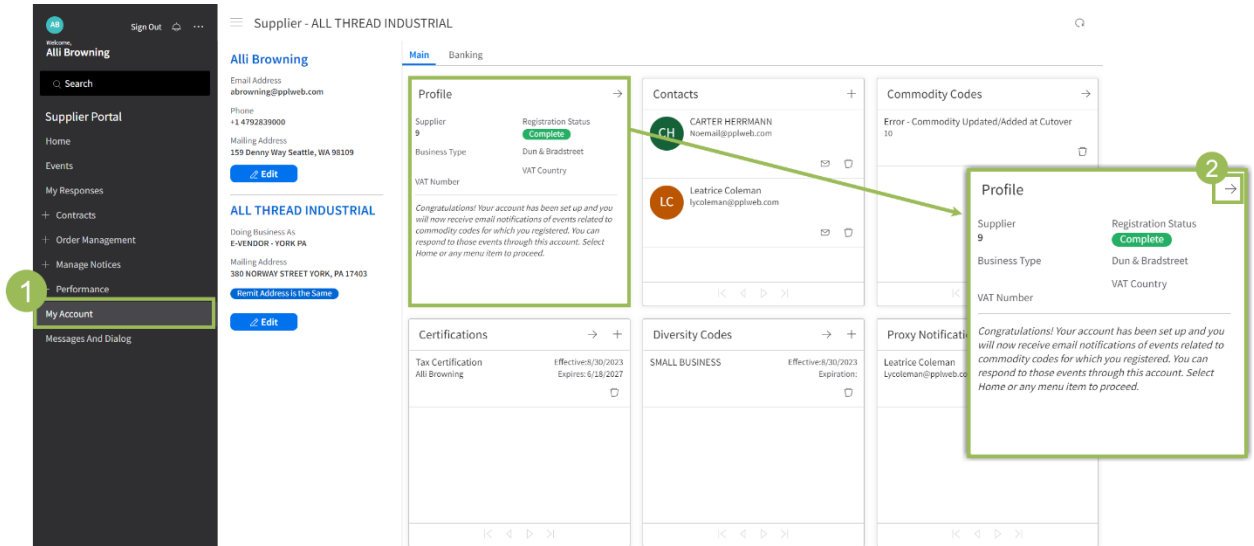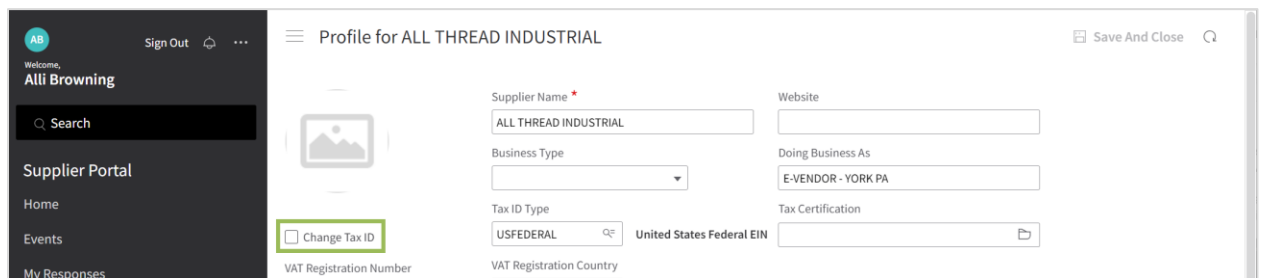
Updating Tax ID Number

Tax ID Numbers are required from all PPL suppliers and is entered when registering as a new supplier. The following section provides step-by-step guidance around updating the Tax ID Number.
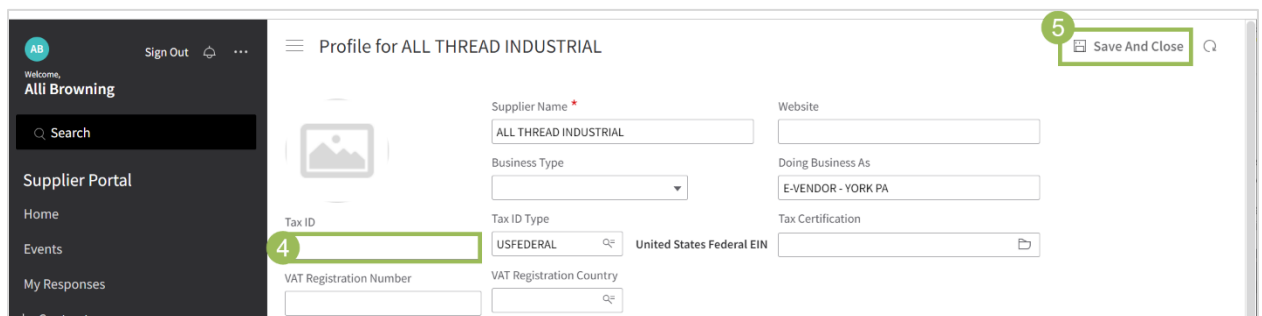
1. In the left-hand menu, click **My Account.**
2. On the **Profile** card, click the **right arrow**.

3. Check the box next to **Change Tax ID.**

4. Enter the new **Tax ID Number.**
5. Click **Save and Close.**

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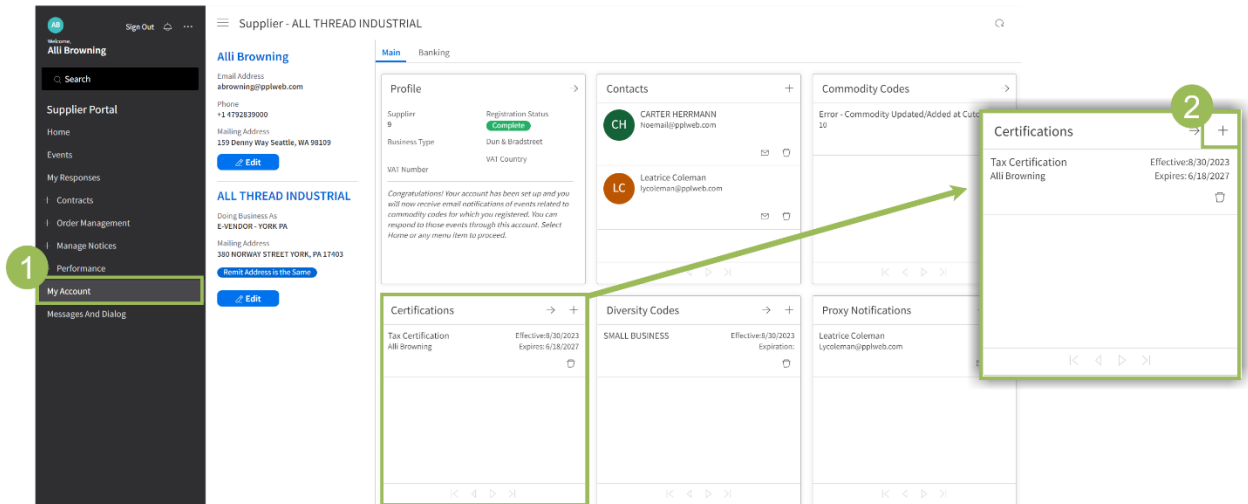Business Use   Page 7
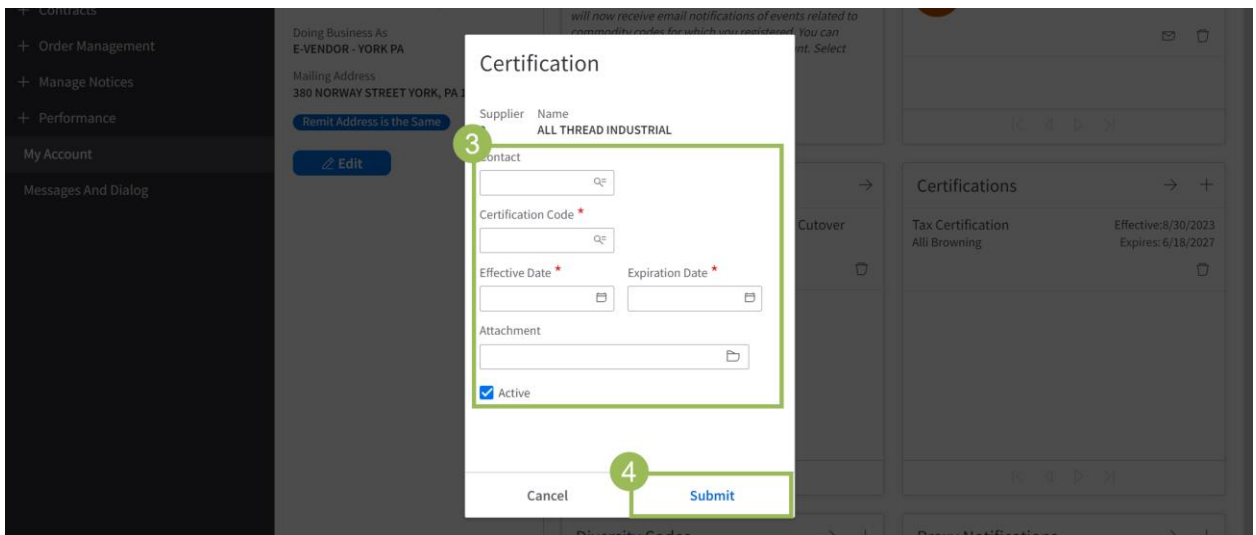
Maintaining Certifications

Certifications allow suppliers to upload relevant certifications, including W9s forms which are required of all PPL suppliers.

Adding New Certifications
1. In the left-hand menu, click **My Account.**
2. On the **Certifications** card, click the **Plus** icon (+).

3. Complete the **Certifications details.**
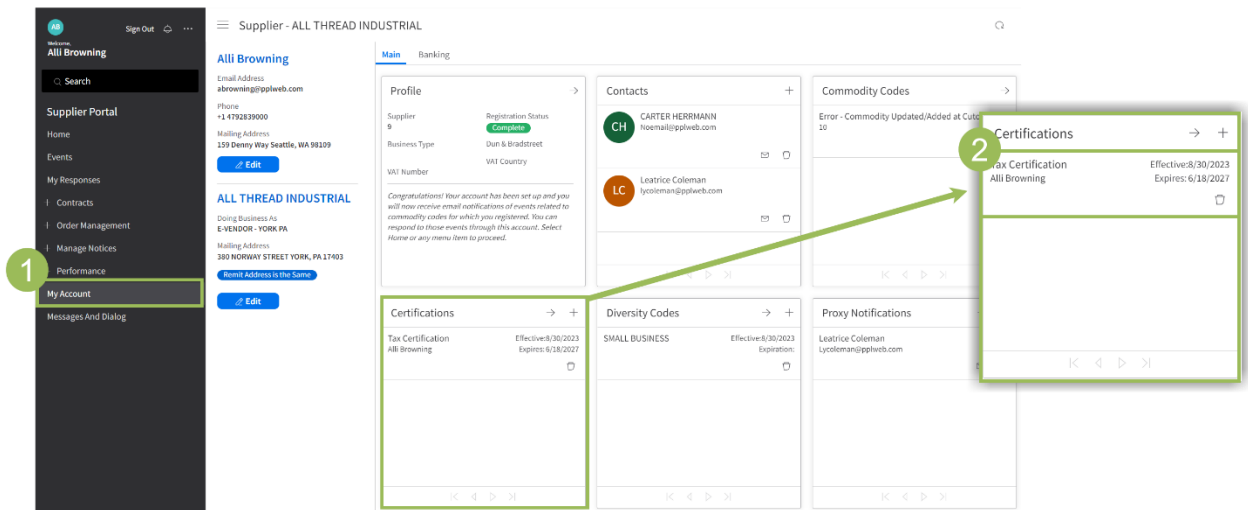   NOTE: Remember to include any relevant attachments including W9s.
4. Click **Submit.**

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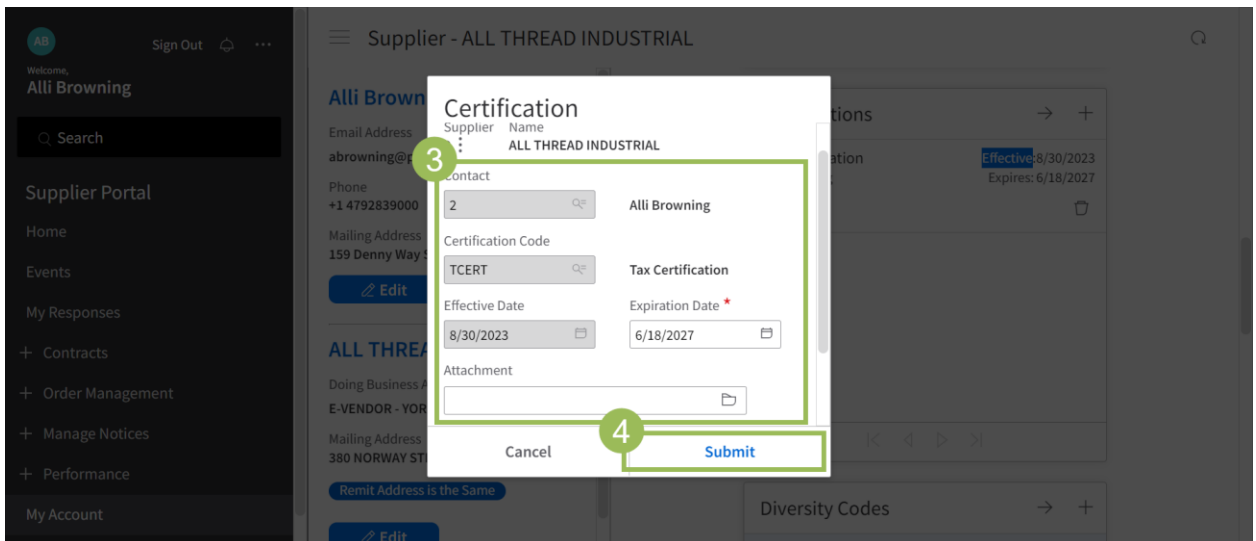## Updating Existing Certifications

1. In the left-hand menu, click **My Account.**
2. Double click the **certification** to open.

3. Update the **Certification** details as needed.
4. Click **Submit**.

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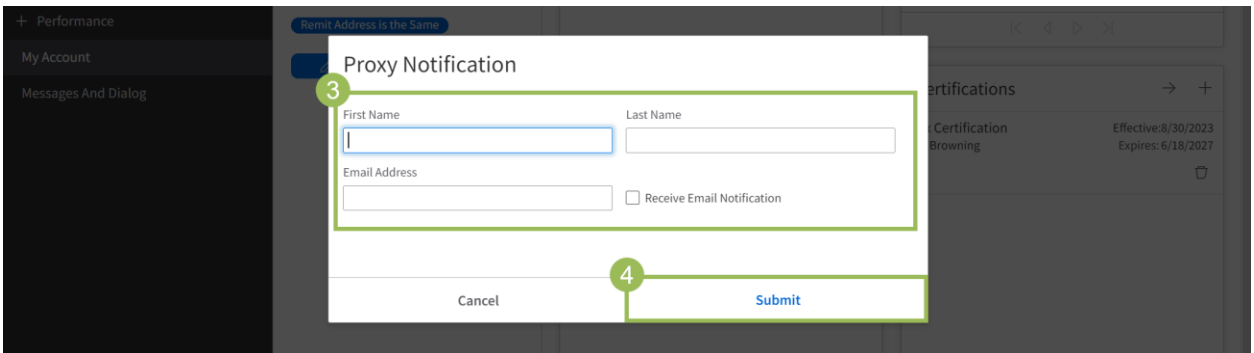
Maintaining Proxy Notifications

A Proxy acts as another contact in the vendor's organization who will receive event updates and notifications. Please note, Proxy contacts **CANNOT** take any action on these events, nor will they have a unique Supplier Portal login.

Adding a New Proxy Notifications

1. In the left-hand menu, click **My Account**.
2. In the **Proxy Notifications** card, click the **Plus** icon (+).
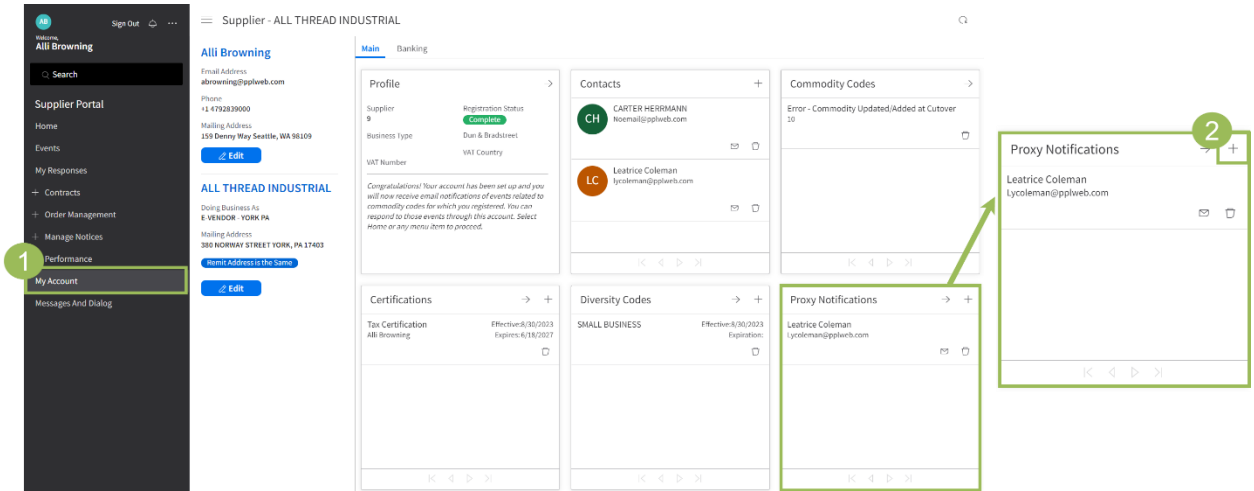
3. Enter the **Proxy Notification** details.
    NOTE: Check the Receive email Notifications box if you would like the new proxy to receive notifications.
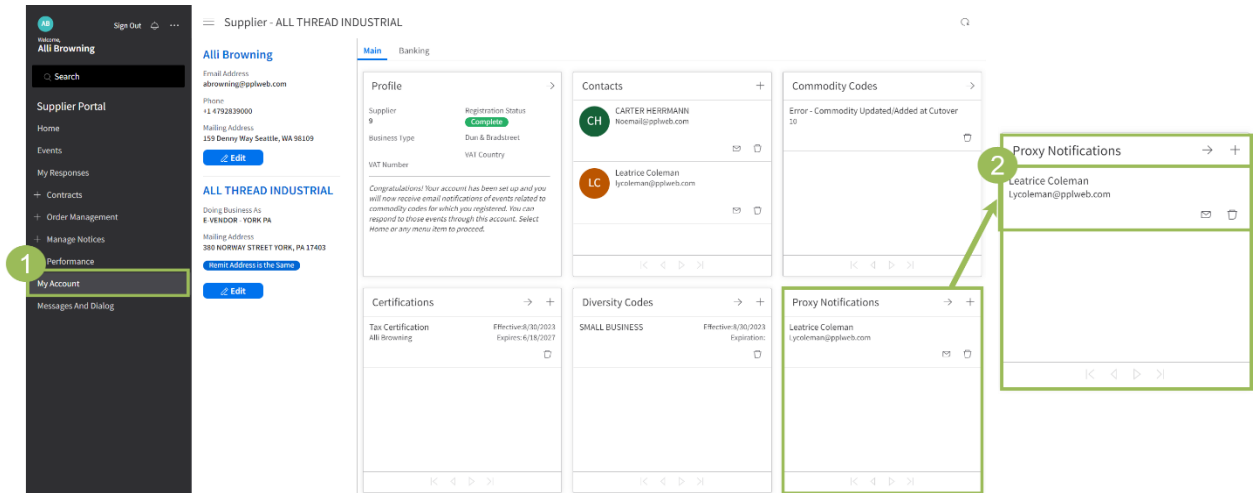4. Click **Submit**.

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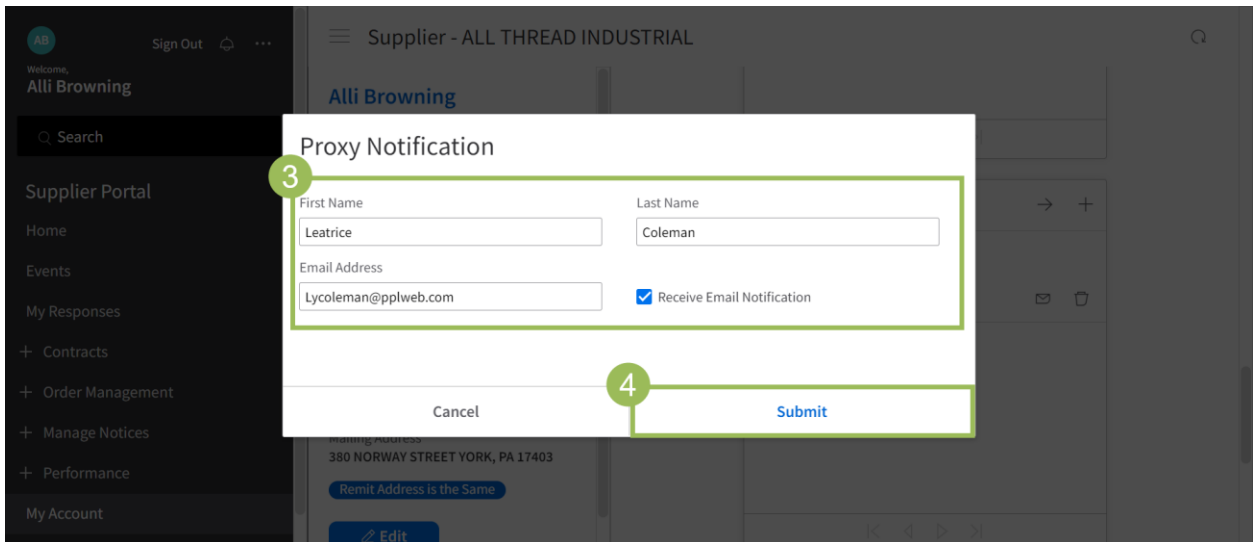
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Updating Existing Proxy Notifications

1. In the left-hand menu, click **My Account.**
2. Double click the **Proxy** to begin editing.

3. Update necessary fields as needed.
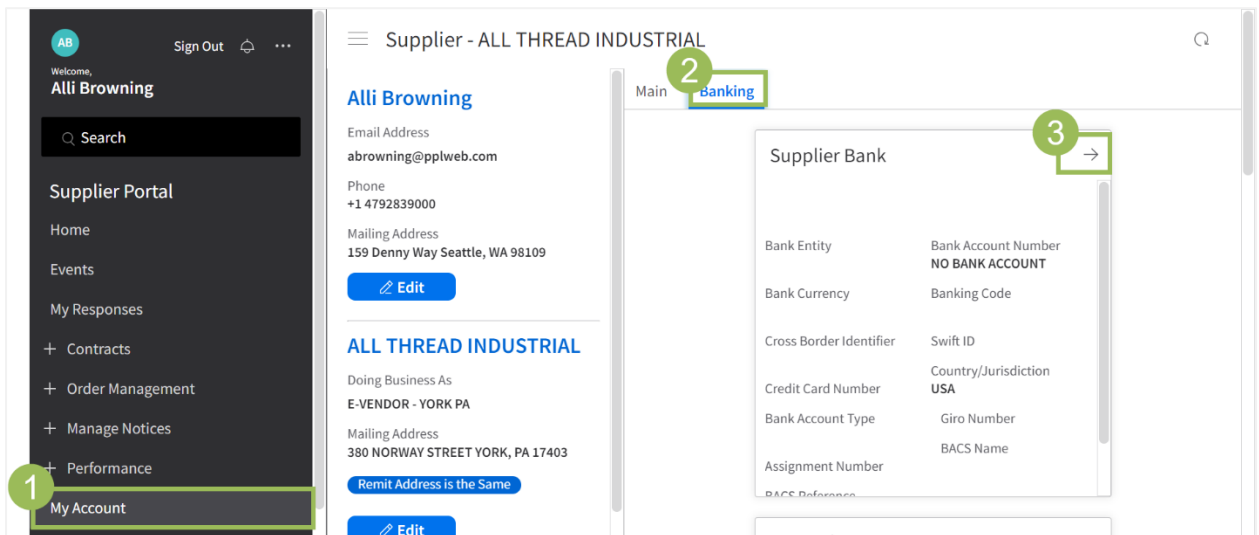4. Click **Submit**.

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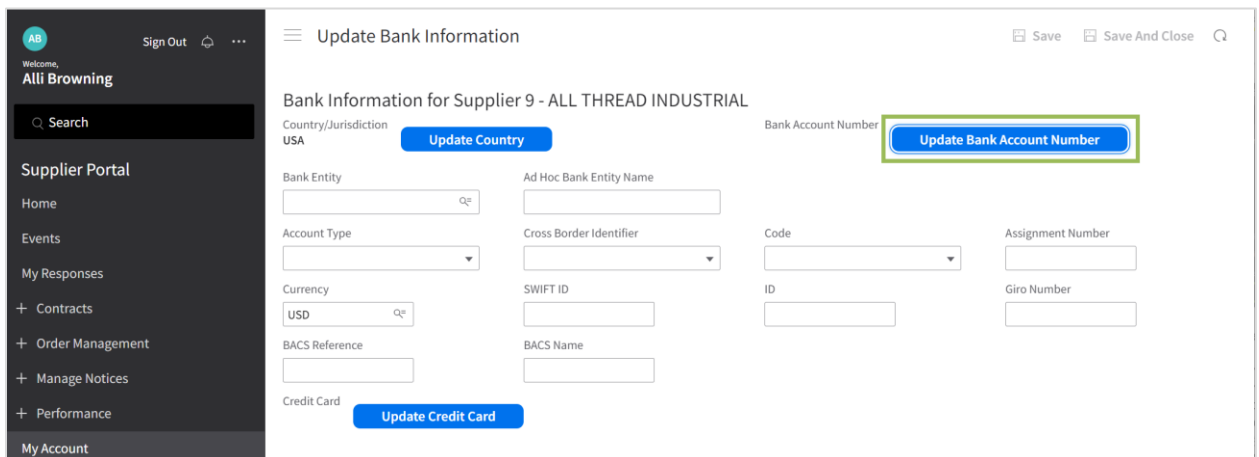
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Adding/Updating Banking Information

Only Contact Classification "Accounting" type can update the Banking Information. See the Update Contact Type to verify and/or update your Contact Classification.

1. In the left-hand menu, click **My Account.**
2. Click the **Banking** tab at the top of the page.
3. Click the **Left arrow** in the **Supplier Bank** card.

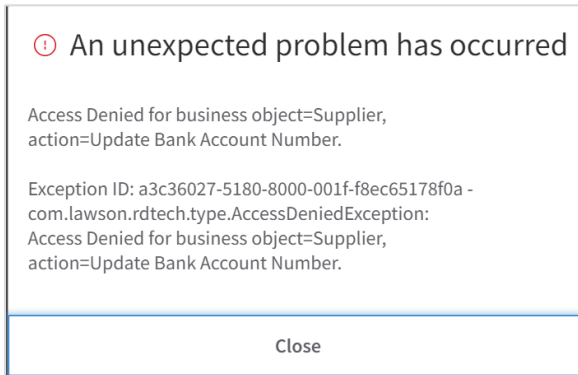4. Click **Update Bank Account Number Button.**

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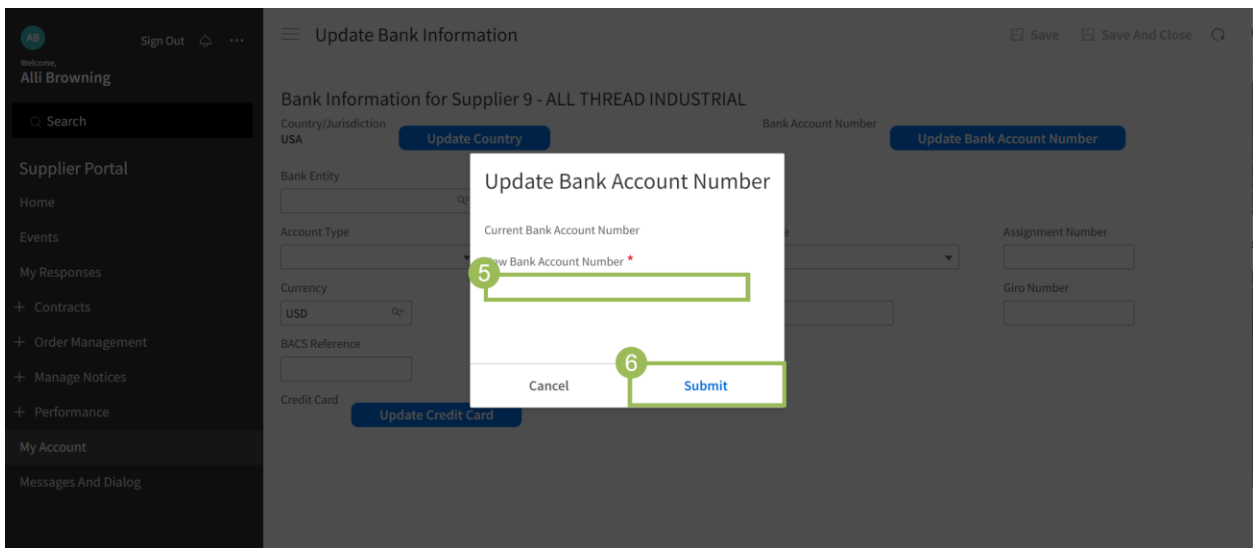
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NOTE: If you receive an error message after clicking the Update Bank Account Number button, you need to update your Contact Classification to Accounting. See Updating Accounting Type section for additional guidance.

5. Enter **New Bank Account Number.**
6. Click **Submit.**

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7. Complete **ONLY** the following required fields:
   a. **Bank Entity:** Enter the bank routing or ABA number.
   b. **Account Type:** Select an Account Type. (i.e. Checking or Savings)
8. Click **Save and Close.**

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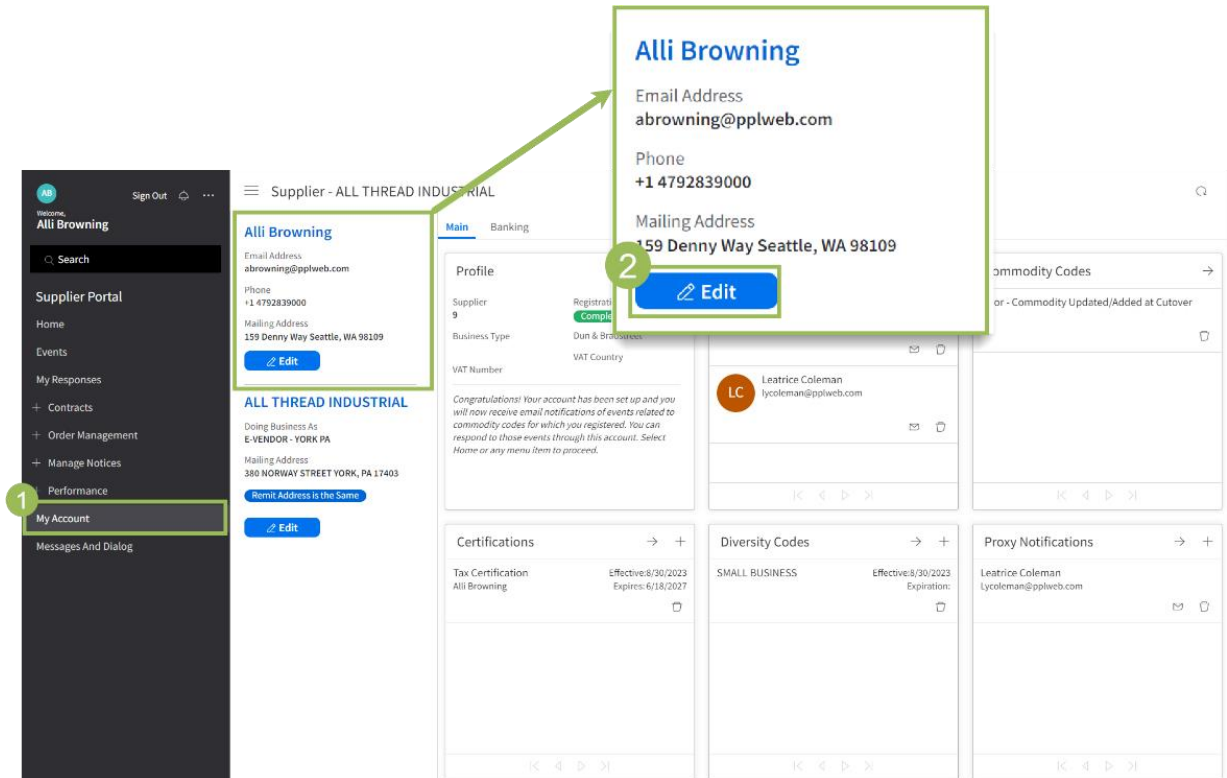Business Use   Page 14

Updating Contact Type

NOTE: Only the primary contact is able to update Contact Classification details. If you are not the primary contact, please reach out to that individual and request they update your classification.

1. In the left-hand menu, click **My Account.**
2. Under the Contact's name, click **Edit** button.

3. Update **Contract Classification** to **Accounting.**
4. Click **Save and Close.**

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