

This job aid will provide the navigation for a supplier to add, create or update organization information (your company information), address details (your company's address and locations), contact information (user contacts), business classifications, products and services, and banking details.

**Step 1.** Login to iSupplier and click the **Admin** tab.

**Step 2.** Click the **Organization** link

**Step 3.** Update or add any additional organization information (your Company's details). **ENTER ALL INFORMATION IN CAPS**

**Step 4.** Click on **Save**.

The screenshot shows the 'Organization' form with fields for D-U-N-S Number (333-33-3333), Chief Executive Name, Title, and Principal Name. It also includes sections for 'Total Employees' and 'Tax and Financial Information' with fields for Taxpayer ID, Analysis Year, and Revenue.

**Step 5.** Click the **Address Book** link

**Step 6a.** Click **Create** to add another site or physical location of business for your company.

**Step 6b.** Click **Update** to make changes to the existing address

Address name	Address Details	Country	Update	Remove
MAIN OFFICE	123 MAIN STREET KALAMAZOO, MI 49001	United States		

## Update Address

\* Indicates required field

Cancel

Save

Supplier Name **UPK SUPPLIER** Supplier Number **66581**

\* Address Name MAIN OFFICE Phone Area Code  
Country United States Phone Number  
\* Address Line 1 123 MAIN STREET Fax Area Code  
Address Line 2 Fax Number  
Address Line 3 Email Address  
Address Line 4

\* City/Town/Locality KALAMAZOO  
County  
State/Region MI  
Province  
\* Postal Code 49001

Purchasing Address  
 Payment Address  
 RFQ Only Address

Step 8. Click Save.

Step 7. Create or Update address information. Enter in all caps. Note: an \* indicates the field is required.

Note: Select if this is a purchasing address if this is an address where PCS can purchase from. Select Payment address if this is an address that PCS used to pay you.

### Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well. Also, include brief notes to buyer about the change when changing address information.

## Profile Management

- General
- Company Profile
  - Organization
  - Address Book
  - **Contact Directory**
  - Business Classifications
  - Product & Services

### Contact Directory

Create

Step 10a. Click Create to add Employee contacts for your business.

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Addresses	Update
UPK	SUPPLIER	UPK SUPPLIER		UPKSUPPLIER@MAILZ.COM	Current	✓		

### Contact Directory : Inactive Contacts

Step 10b. Click Update to make changes to an existing contact.

Step 9. Click the Contact Directory link

**Update Contact**  
\* Indicates required field

Contact Title

First Name

Middle Name

\* Last Name

Alternate Name

Job Title

Department

Email Address

Url

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date

(example: 2017-04-19 19:45:00)

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**User Account Information**

**Step 12.** Click **Apply**.

**Step 11.** Enter or Update contact information (Enter in all caps). **Note:** \* indicates required field.

**Step 13.** Click the **Business Classification** link to list any qualifications or specific categories your business falls into.

Business Classifications

**Certification**

I certify that I have reviewed the classification below and they are current and accurate.

Last Certified By

**TIP** Date format example: 2017-04-13

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Hub Zone	<input type="checkbox"/>				
MIPR Assisting Agency	<input type="checkbox"/>				
Minority Owned	<input type="checkbox"/>	<input type="text" value=""/>			
Service-disabled Veteran Owned	<input type="checkbox"/>				
Small Business	<input type="checkbox"/>				
Veteran Owned	<input type="checkbox"/>				

**Step 16.** Click the checkbox to certify.

**Step 17.** Click **Save**.

**Step 14.** Select the **Applicable** business classification checkbox.

**Step 15.** Enter the desired information into the certification fields.

Home Orders Shipments Product Admin

**Profile Management**

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  - Product & Services**
  - Banking Details
  - Payment & ...

**Products and Services**

Remove Add

Select All | Select None

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/>	ACCOMMODATION FURNITURE	56100000	2017-05-23	Pending Approval
<input type="checkbox"/>	ACCOUNTING AND BOOKKEEPING SERVICES	84110000	2017-05-23	Pending Approval
<input type="checkbox"/>	BATTERIES, GENERATORS, TRANSMISSION	26110000	2017-05-23	Pending Approval
<input type="checkbox"/>	BEVERAGES	50200000	2017-05-23	Pending Approval
<input type="checkbox"/>	CLUBS	94120000	2017-05-23	Pending Approval

**Step 20a.** Click on **Add** to add additional products & services.

**Step 18.** Click the **Product & Services** link to update the product and services your company provides.

**Step 19.** Click on **Select** checkbox and then click **Remove** to remove Products & Services from your list.

**Step 20c.** Click **Apply**.

Add Products and Services: (UPK SUPPLIER)

Cancel **Apply**

- Browse All Products & Services
- Search for Specific Product & Service

**Note:** You can choose to either search or browse for products and services.

Previous 1-10 Next 10

Code	Products and Services	View Categories	Applicable
ACCOMMODATION FURNITURE	56100000	<input type="checkbox"/>	Applicable
ACCOUNTING AND BOOKKEEPING SERVICES	84110000	<input type="checkbox"/>	Applicable
ADDITIVES	12160000	<input type="checkbox"/>	Applicable
ADHESIVES AND SEALANTS	31200000	<input type="checkbox"/>	Applicable
ADVERTISING	82100000	<input type="checkbox"/>	Applicable
ALL	All	<input type="checkbox"/>	Applicable

**Step 20b.** Search and select the **Applicable** products and services checkbox. If the applicable checkbox is grayed out, the product or service is already assigned to your company's list.

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  - Product & Services
  - Banking Details**
  - Payment & ...

**Banking Details**

View: General Accounts

TIP: Display format example: 20

Add **Create**

Account Details	Number	IBAN	Currency	Name	Start Date	End Date	Increase Priority	Decrease Priority	Status	Update	
Show	321123321			BANK OF AMERICA NA (CANADA)	2017-04-13		1	^	v	New	

Cancel Save

**Step 22a.** Click on **Create** to add another bank to be approved.

**Step 21.** Click the **Banking Details** link to add a new bank or update banking information

**Step 22b.** Click on **Update** to make changes to an existing account.

### Update Bank Account

\* Indicates required field

Cancel

Save

\* Country

Account is used for foreign payments  
Account definition must include bank and branch information.

Bank	Branch
<input type="radio"/> New Bank <input checked="" type="radio"/> Existing Bank Bank Name <input type="text" value="BANK OF AMERICA NA"/> Bank Number <input type="text" value="241"/> <a href="#">Show Bank Details</a>	<input type="radio"/> New Branch <input checked="" type="radio"/> Existing Branch Branch Name <input type="text" value="B OF A - CANADA"/> Branch Number <input type="text" value="56792"/> BIC <input type="text"/> Branch Type <input type="text" value="OTHER"/> <a href="#">Show Branch Details</a>

Step 24.  
Click Save.

### Bank Account

* Account Number <input type="text" value="321123321"/>	Account Name <input type="text"/>
Check Digits <input type="text"/>	Currency <input type="text"/>
IBAN <input type="text"/>	Account Status <b>New</b>

[Show Account Details](#)

### Comments

Note from Buyer **None**  
Note to Buyer

Step 23. Enter or Update Bank account information (Enter in all caps). **Note:** \* indicates required fields.

Step 25.  
Click Save.

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  - Banking Details**

#### Banking Details

View

TIP Date format example: 2017-04-19

Details	Account Number	IBAN	Bank Currency Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
<a href="#">Show</a>	321123321		BANK OF AMERICA NA (CANADA)	2017-04-13		1	▲	▼	New	

**SUCCESS!!** You have now updated the Supplier's Profile. You will be notified once your changes are approved. (Your changes were submitted for PCS approval for each section when you click save or apply.)