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| Supplier Portal – Manage My Site  Department of Justice and Community Safety |



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# Set User Preferences

You can change your user settings or preferences at any time using the Preferences link at the top right-hand side of each screen in the Supplier Portal.

| Step | Action |
| --- | --- |
| 1 | Select the **Settings** link at the top of the screen |
| 2 | **Select Preferences** – the **General Preferences** page displays. Change your preferences as per your requirements |
|  | Set User Preferences |
| 3 | **General Preferences:** this section will allow you to set your language, accessibility and regional settings, such as time zone, number format and currency |
| 4 | **Password:** reset or change your password. Your password MUST have a minimum of ten characters – with at least one number and one letter. Your password must not contain characters that repeat next to each other OR contain your user name. It is recommended that passwords contain a mixture of upper and lowercase characters and at least one special character |
| 5 | **Notifications:** select how you want to receive your notifications, e.g. HTML or plain text email |

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| --- | --- |
|  | Change password_user_preferences |
| 6 | Select **Apply** to save your changes |

**NOTE:** Select the **Cancel** button to return to the system without making changes, or restore original settings by selecting **Reset to Default**

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# Maintain Company Details

You can maintain and update your profile directly within the Supplier Portal.

You can update:

* address book
* contact number
* bank account, and
* email addresses.

Any changes made by you will need to be approved by the department within 48 hours. It will then be reflected in the portal.

It is your responsibility to ensure that the data you input is accurate and approved by the right representative, who has the right level of authority, in your organisation.

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| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Under the **Company Profile** in the left-hand menu – options appear for you to select from  Select the area in which you want to make the changes and update |
| 3 | Add an **Attachment** to your company profile if required |
| change details | |

# Company Profile Links

You can make the following changes in Company Profile.

|  |  |
| --- | --- |
| Area | Description |
| Organisation | Allows you to add and update data and information about your company, including your  Tax Number and number of employees.  Once information is added or changed. Select **Save** |
| Address Book | Allows you to create a new address, update or remove an existing one within your company. See [Maintain your Address Book](#_Maintain_your_Address) |
| Contact Directory | Allows you to create contacts and update contact details within your company.  See [Maintaining Contact Details](#_Maintaining_Contact_Details_1) |
| Business Classification | Select your Business Classification from a list, such as small business, minority owned.  See [Add the Business Classification](#_Add_the_Business) |
| Product & Services | Allows you to classify the type of goods or services that you offer.  Once information is added. Select **Save** |
| Banking Details | Add or update your banking details. See [Add and Update Bank Details](#_Add_and_Update) |
| Payment & Invoicing | A list of payments and invoices |

# Maintain Your Address Book

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Address Book** from the left-hand menu |
| 3 | Select the **Create** button to create a new address. Add address information as required and select **Save** |
| 4 | Select the **Update** icon to make changes to the existing address. Update fields as required and select **Save** |
| 5 | Select the **Remove** icon to remove an address from the address book |
|  | addressbook |

# Maintain Contact Details

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Contact Directory** from the left-hand menu |
| 3 | Select the **Create** button to create a new contact. Add contact information as required and select **Apply** |
| 4 | Select the **Update** icon to make changes to an existing contact. Update fields as required and select **Apply** |
| 5 | Select the **Addresses** icon to create additional addresses for a contact |
| 6 | To see Inactive Contacts, select the **Contact Direct: Inactive Contacts** collapsible menu |
|  | contact directory2 |

# Create a New Contact

| Step | Action |
| --- | --- |
| 1 | Select the **Create** button |
|  | create a new contact1 |
|  | The **Create Contact** screen will display – complete all mandatory and non-mandatory fields as required |
| 2 | Under **User Account**: select **Create User Account** checkbox if required  Enter the Supplier Name  Enter the **Username** (note – this is the users email address) |
|  | |
|  | Note – when creating a new contact/user the user will receive **Full Access**. If the user requires **View Only** access, please send an email request to [SupplierSupport@justice.vic.gov.au](mailto:SupplierSupport@justice.vic.gov.au) and include:   * the users full name * the users email address |
| 3 | To restrict access to certain sites (e.g. VOCAT) select the **Modify Sites** Button under the Site Restriction Tab – when the pop-up screen opens ensure that only the sites that the user should see are selected |
| 4 | Select **Apply** |

|  |  |
| --- | --- |
| Step | Action |
|  |  |

**NOTE:** The new contact will receive email confirmation with a User ID and a system generated password. The user will be prompted to change their password on first login.

# Update an Existing Contact

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Update** icon |
|  | update a contact1 |
| 2 | The **Update Contact** screen displays. Update contact information as required |
| 3 | If the contact/user is to be removed enter the **Inactive Date** |
| 4 | If these are the only changes required, select the **Apply** button |
| 5 | Select **User Account Information** collapsible arrow to reveal extra information |
|  | update a contact2 |
| 6 | Set **Responsibilities** as required |
| 7 | Add **User Restrictions** as required |
| 8 | Select **Apply** |

|  |  |
| --- | --- |
| Step | Action |
| update a contact3 | |

# Add an additional address for a contact

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Addresses** icon |
|  | add additional address_1 |
|  | The Address Associations for Contact screen will display |
| 2 | To remove an address, select the **Remove** icon |
| 3 | To add a new address, select the **Add** icon.  **Note:** You cannot create a new address here, you can only select one from your Address Book. You must create any addresses first. |
|  | add additional address_2 |
| 4 | When required address is found – select **Save** button |

# Add the Business Classification

| Step | Action |
| --- | --- |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Business Classifications** from the left-hand menu |
| 3 | Select the **Applicable** checkbox next to the appropriate classification |
| screen 1 | |
| 4 | Complete the fields next to the appropriate classification:   * Minority Type (if available) * Certificate Number * Certifying Agency * Expiration Date (use calendar to select date) |
| 5 | Select the **Certification** checkbox certifying that you have reviewed the classification and can confirm it is current and accurate |
| 6 | Select **Save** |

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| --- | --- |
| Step | Action |
| screen 2 | |
| 7 | Return to the **General** screen in Profile Management |
| 8 | Add an appropriate attachment supporting classification where required by selecting  **Add Attachments** |
| screen 3 | |
| 9 | Complete [**Add Attachment**](#_Adding_Attachments) pop-up window and **Apply**   * Attachment Type: File * **Title:** name of document * **Description:** description of document * **Browse** for file |

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| --- | --- |
| Step Adding Bank Details | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Banking Details** from the left-hand menu |
| 3 | Select the **Create** button to create new banking details |
|  | |
|  | **Please Note**: You will not need to select the **Add** button – this is to add a bank account that is being used by your company on another site. If you wish to share bank details, please contact [Supplier Support](#_Need_Help?) |
|  | The **Create Bank Account** screen opens with the following sections to complete:   1. Bank – ANZ, Commonwealth etc., or a bank that does not currently exist in the system 2. Branch – an existing branch or a branch that is currently not in the system 3. Bank Account 4. Comments – add comments for the department |
|  | |
| 5 | Select **Show Bank Details** icon will display more areas to complete |
|  |  |
| 5 | Complete **Branch** details section – choosing whether branch currently exists within the system or needs to be added as a new branch. Select **Show Branch Details** link to complete additional areas |
|  |  |
| 6 | Complete **Bank Account** details section. Select **Show Account Details** link to complete additional areas |
|  | |
| 7 | Type in a **Note to Buyer** (the Department) advising of the attachment. Add supporting documentation through[**Add Attachment**](#maintitle)on the **General** screen |
| 8 | Select the **Save** button |

**Please note:** Supporting documents must be attached to validate the bank details

# Updating Bank Details

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Banking Details** from the left-hand menu |
|  | |
| 3 | Open the details collapsed menu to see more information about this account |
| 4 | Select the **Update** icon to make changes to the existing account |
| 5 | Set an end-date for the date a bank account can no longer be used |
| 6 | **U**se the **Increase Priority** and **Decrease Priority** arrows to change the order in which the account numbers are used and displayed |
| 7 | Select the **Save** button |
| 8 | Add supporting documentation through[**Add Attachment**](#maintitle)on the **General** screen |
|  | Once the Bank Account update has been reviewed and approved by DJCS a notification email will be sent to the user who has inputted the change |

**Please note:** Supporting documents must be attached to validate the bank details

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| --- | --- |
| Step | Action |
| 1 | Access the Oracle log in page |
| 2 | Select the **Login Assistance** button |
|  | |
| 3 | Enter your **User Name** (note – this is your email address) |
| 4 | Select **Forgot Password** |
| Login_assistance | |
| 5 | The confirmation message will display and direct you to access your email to complete the password reset process.  Please note – you may need to check your junk mail folder if you do not receive the email. |
|  | |

# Resetting Your Password

# Maintain Company Details

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Under the **Company Profile** in the left-hand menu – options appear for you to select from  Select the area in which you want to make the changes and update |
| 3 | Add an **Attachment** to your company profile if required |
| change details | |

# Adding Attachments

Attachments must be added for **Business Classification** and **Banking Detail** changes and additions.

|  |  |
| --- | --- |
| Step | Action |
| 1 | Select the **Administration** icon, the **General** screen opens |
| 2 | Select **Add Attachment** button |
|  | |
| 3 | The **Add Attachment** pop-up opens |
| 4 | Select **Attachment Type** from the drop-down |
| 5 | Type in **Title** of document |
| 6 | Type a **Description** of the document |
| 7 | **Browse** for the file – you can add any number of attachments by selecting **Add Another** |
| 8 | Select the **Apply** button |
|  | |

For general assistance with the Supplier Portal, please send request to the team: SupplierSupport@justice.vic.gov.au

For queries relating to Purchase Orders and Receipts in the Supplier Portal, contact the relevant business unit.

The Department of Justice and Community Safety and Court Services Victoria will support you in using the Supplier Portal.

# Need Help?