

Existing Supplier Changes Portal Guide

IMPORTANT: This guide is for existing suppliers to request changes to supplier information. *To access the supplier portal, you must first create a User ID and password if you have not already done so. A separate instruction guide is available for creating a User ID.*

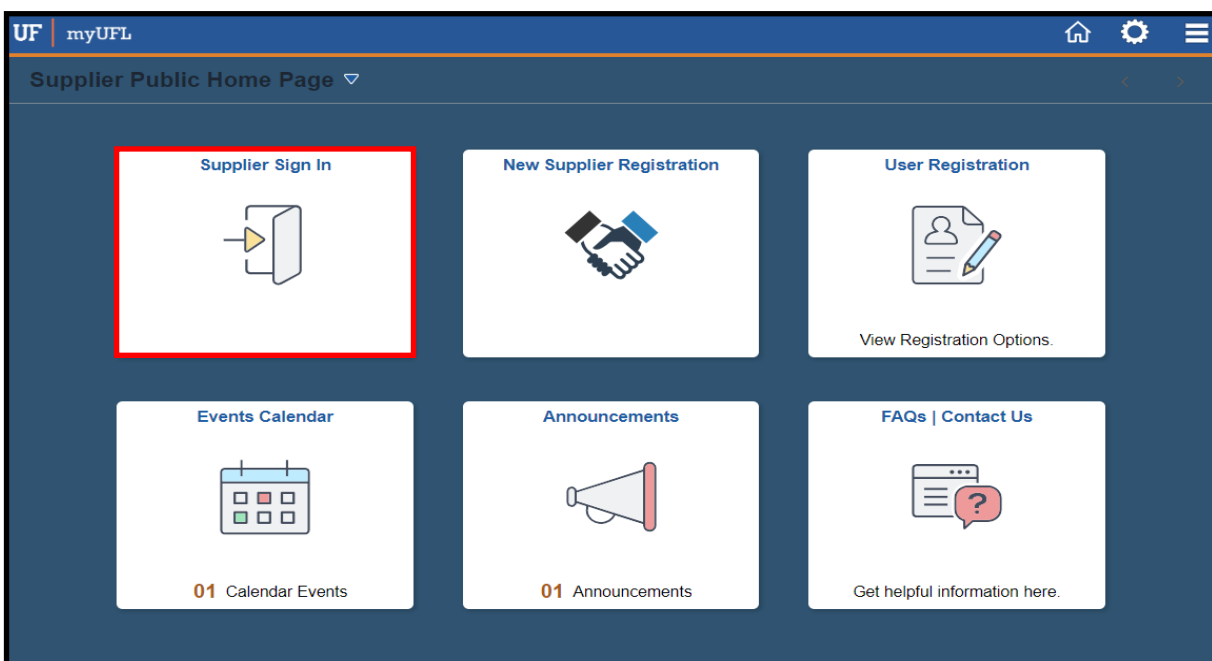
NEW suppliers should follow the instructions for New Supplier Registration.

INTERNATIONAL SUPPLIERS must be referred to Tax Services for approval before processing changes or updates. International suppliers must send the appropriate W8 to the UF department they are doing business with so they can forward to Tax Services at payroll-services@ufl.edu. Tax Services will review the request and if approved, they will forward it to the UF Supplier team to update the file.

Before you sign in to the supplier portal, please be sure to have the following documents available:

- Businesses using an EIN or TIN will need IRS Form [W9](#)
- Individuals using a SSN will need a completed [Supplier Tax Information Form](#)

To enter your change request, navigate to the [UF Supplier Portal home page](#) and click the Supplier Portal Link. Select “Supplier Sign In.”



Step 1—Verification & Log In

First please enter your User Id and hit the Tab key to see the email address we have on file for you. Then click the 'Send Email' button and verify your identity below with the code from the email.

User ID

Email ID

Descr

Enter your User ID and click “Send Email.”

The User ID is the ID you previously created. If you have not yet created your User ID, please do so before beginning.

Remember: Your User ID begins with “SUP.”

First please enter your User Id and hit the Tab key to see the email address we have on file for you. Then click the 'Send Email' button and verify your identity below with the code from the email.

User ID

Email ID **Your email address populates here automatically**

Descr 389500

Check your email for the verification code and enter it in the box. Click “Verify” to proceed.

First please enter your User Id and hit the Tab key to see the email address we have on file for you. Then click the 'Send Email' button and verify your identity below with the code from the email.

User ID

Email ID

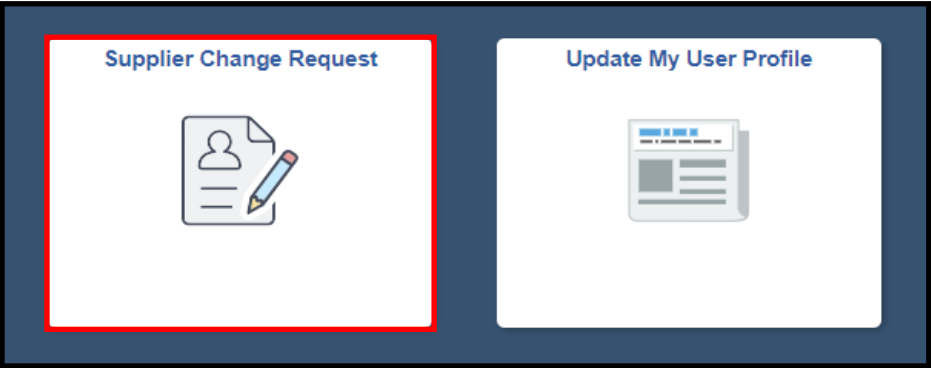
Password

[Forgot password](#)

Enter your password and click “Sign In.”

This will bring you to the Supplier Secure Home Page.

Step 2—Select Your Change



Select **Supplier Change Request** to update addresses, banking information, and/or contact information.

Select **Update My User Profile** to update user password and/or email address.

Step 3—Enter Your Change

Supplier Change Request Selection

Select Supplier

*Supplier

[Create New Request](#)

Pending Change Requests

Supplier ID	Name	Request ID	Change Status	Date
0000XXXXX	Supplier	0000008632	Pending Approval	06/21/20XX

Click “**Create New Request**” to begin a new change request

If you have any pending change requests, you will see them in the pending section. You may click the link under “Request ID” to view or update your pending request.

Welcome

Welcome

Company Profile | Addresses | Contacts | Payment Profile | Submit

Exit | Save for Later | < Previous | Next >

Review Changes

Welcome

(Supplier Name)

In this portal, you can make changes to your existing information. Before you begin please have the [Supplier Tax Information form](#) filled out as you will be required to attach a copy on the next page.

You only need to make the changes necessary. You do not have to re-enter any fields or forms that need no changes.

Review Changes

Exit | Save for Later | < Previous | **Next >**

Review the information on the **Welcome** page and click “**Next**” to begin.

Company Profile

WelcomeCompany ProfileAddressesContactsPayment ProfileSubmit

ExitSave for LaterPreviousNext

Company Profile for SupplierReview Changes

Please make sure to enter a Supplier Name and Attach the Supplier Tax Information Form under the Profile Question section.

Unique ID & Company Profile

*Supplier NameSupplierDoing Business As (if applicable)

Expand AllCollapse All

UNSPSC Codes

Profile Questions

*Supplier Tax Information Form

Attachments (1)Add/View Attachments

Provide the department and the department contact you are working with

Email or fax number where purchase orders should be sent

On the Company Profile page, re-view your information and make any necessary updates.

You must attach your W9 (businesses) or your Supplier Tax Information form (individuals) by clicking the “Add/View Attachments” link.

Addresses

WelcomeCompany ProfileAddressesContactsPayment ProfileSubmit

ExitSave for LaterPreviousNext

Addresses for SupplierReview Changes

Description	Address Line 1	Change Action	Change Effective Date	Edit
Primary Address	123 Gator Lane			

Add New Address

Review Changes

ExitSave for LaterPreviousNext

On the Addresses page you may edit your address(es) by clicking the pencil icon or clicking the “Add New Address” button.

Contacts

WelcomeCompany ProfileAddresses**Contacts**Payment ProfileSubmit

ExitSave for LaterPreviousNext

Contacts for Supplier

Review Changes

Name	Address	Change Action	Change Effective Date	Edit
Contact Name 1	Primary Address			
Contact Name 2	Primary Address			

Add New Contact

Review Changes

ExitSave for LaterPreviousNext

On the Contacts page you may edit your contacts by clicking the pencil icon or clicking the “Add New Contact” button.

Payment Profile

WelcomeCompany ProfileAddressesContacts**Payment Profile**Submit

ExitSave for LaterPreviousNext

Payment Profile for Supplier

Review Changes

Use Location 001 to add/update bank account. Only one bank account is allowed.
New addresses added as part of this change request will not be immediately available for selection. Please add a comment to apply as your invoicing and/or remittance address.

Location	Description	Action	Change Effective Date	Default	Edit
001	MAIN		06/21/20XX		

Add New Location

Review Changes

ExitSave for LaterPreviousNext

To edit your banking information, click the pencil icon.

If no update is needed, click “Next.”

Please see additional instructions regarding the Payment Profile on the following page.

Payment Profile Detail

Payment Profile

Payment Profile for 001 - MAIN

Invoicing

Supplier: Supplier Name
Primary Address
123 Gator Lane
Gainesville, FL 32603

Select a Different Address

Remitting

Supplier: Supplier Name
Primary Address
123 Gator Lane
Gainesville, FL 32603

Select a Different Address

Expand All Collapse All

Payment Preferences

Payment Terms ID: 30 Net 30

Payment Method: Automated Clearing House

Location Comments

Comment:

Attachments

***Please note that in order to add your Direct Deposit information we must have one of the following forms of account verification:

1. A voided check which confirms the account/routing number you have provided. No starter or counter checks accepted.
2. A copy of the bank statement that lists and confirms the account #, Bank name and account holder's name. All balances and transactions should be redacted.

Attach below

Attachments

Bank Accounts

Default	Beneficiary Bank	Bank ID Number	Branch Name	Bank Account #	Edit
<input checked="" type="checkbox"/>	Citibank	322271724		XXXXXXXXXX	

Add Bank Account

OK Cancel

On the Payment Profile detail page you may edit your banking information by clicking the pencil icon next to the banking information or by clicking the “Add Bank Account” button.

Be sure to attach your banking backup document!

Click “OK” to return to the main Payment Profile screen.

Submit

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

Exit Save for Later < Previous Next >

Review and Submit Changes for Krizia Columna

Thank you for your submission. We will review your request, and you will be notified by email of any updates.
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:
SUPPLIER@COMPANY.COM; EMPLOYEE@UFL.EDU

☒ Confirm Changes

Review Withdraw Submit

Exit Save for Later < Previous Next >

On the Submit screen, complete the Acknowledgements section by checking all applicable boxes.

You may click “Review” to review your changes. Once you have reviewed, click the “Confirm Changes” box and “Submit.”

The change request will be reviewed by the Supplier Team and you will be contacted if any additional information is needed.