



ENB Oracle Supplier Portal: Submit a Profile Change Request

Learning Guide

Sep 17, 2021

Contents

Submit a Profile Change Request	
Begin a Profile Change Request	3
Edit/Add Profile Information.....	5
• Organizational Details	5
• Contacts.....	7
• Business Classifications	12
Submit a Profile Change Request	15

Submit a Profile Change Request

Purpose	This learning guide will provide you with the information needed to successfully submit a profile change request within the Oracle Supplier Portal.
---------	---

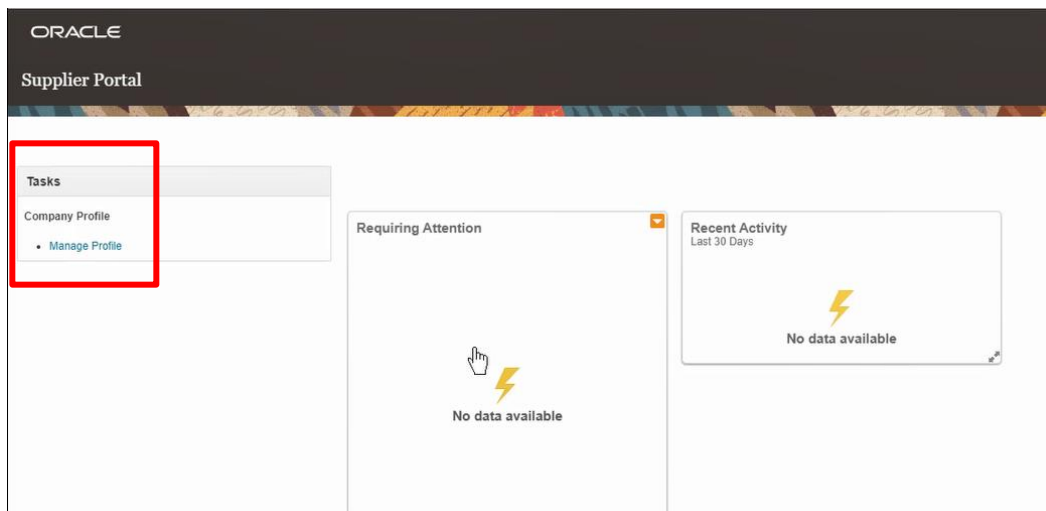
Begin a Profile Change Request

1. From the Oracle **Home Page** navigate to the **Supplier Portal** application tile under the **Supplier Portal** menu.

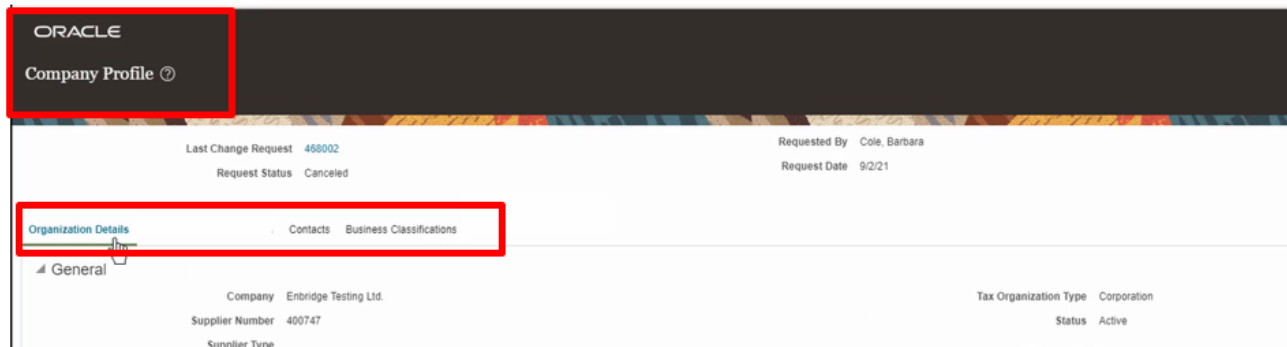


2. The **Supplier Portal** dashboard will display.

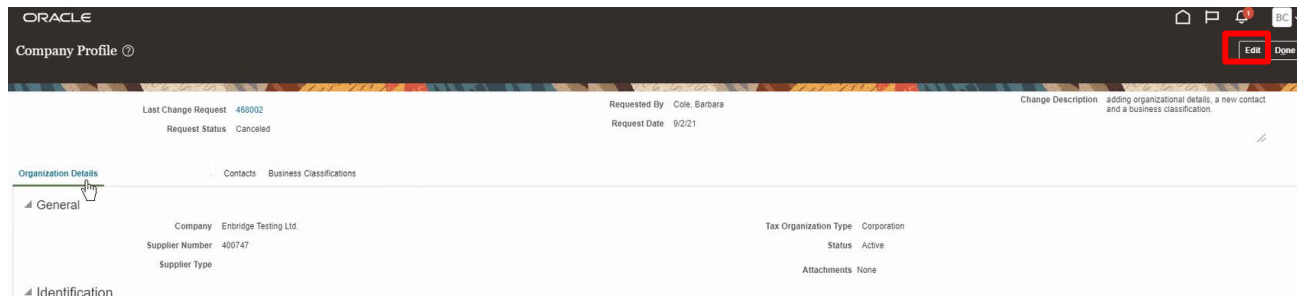
The **Tasks** menu is located on the left side of the dashboard. The tasks that are visible to you are based on your Supplier Portal role assignment. Navigate to the **Company Profile** task and select the **Manage Profile** subtask.



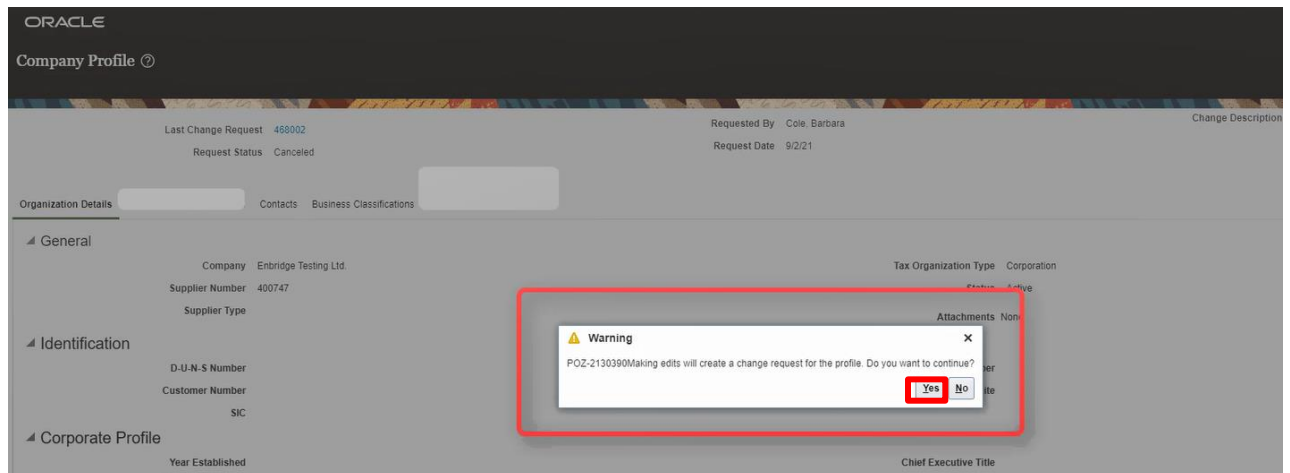
3. The **Company Profile** page will display. There are different profile information tabs available for you to view and/or edit, **Organizational Details, Contacts and Business Classifications**.



4. To begin a company profile change request, navigate to the top right corner of the screen and select the **Edit** button.



5. A warning message will appear, alerting you that making edits will create a change request for the profile. Click **Yes** to continue.



6. The **Company Profile** page now display in **Edit** mode. Notice in the top left corner of the screen an **Edit Profile Change Request** number appears, as well as a change description box.

ORACLE

Edit Profile Change Request: 468003

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Contacts Business Classifications

General

Supplier Name: Entbridge Testing Ltd.
Supplier Number: 409747
Supplier Type: [Dropdown]

Identification

D-U-N-S Number: [Field]
Customer Number: [Field]
SIC: [Field]

Corporate Profile

Year Established: [Field]
Mission Statement: [Text Area]
Year Incorporated: [Field]

Financial Profile

Fiscal Year End Month: [Dropdown]

Tax Organization Type: Corporation
Status: Active
Attachments: None

National Insurance Number: [Field]
Corporate Web Site: [Field]

Chief Executive Title: [Field]
Chief Executive Name: [Field]
Principal Title: [Field]
Principal Name: [Field]

7. Add the details of the change request in the **Change Description** box.

ORACLE

Edit Profile Change Request: 468003

Change Description: adding organizational details, a new contact and a business classification

Organization Details Contacts Business Classifications

General

Edit/Add Profile Information

Organizational Details

The **Organizational Details** work area displays the following information:

- **General** company profile information, such as the company name, supplier number and supplier type
- **Identification** information, such as the 9-digit Data Universal Numbering System (D-U-N-S) Number, Customer Number, Standard Industry Code (SIC), National Insurance Number and corporate website
- **Corporate Profile** information such as the year established, and mission statement, etc.
- **Financial Profile** information such as the preferred functional currency and fiscal year-end month

8. From the **Organizational Details** work area, you may add/edit accordingly by entering information into the available fields. In the example below, we will add information within the **Financial Profile** section.

Organization Details Contacts Business Classifications

General

* Supplier Name: Enbridge Testing Ltd.
Supplier Number: 400747
Supplier Type: [Dropdown]

Identification

D-U-N-S Number: [Text]
Customer Number: [Text]
SIC: [Text]

Corporate Profile

Year Established: [Text]
Mission Statement: [Text Area]
Year Incorporated: [Text]

Financial Profile

Fiscal Year End Month: [Dropdown]
Current Fiscal Year's Potential Revenue: [Text]

Tax Organization Type: Corporation
Status: Active
Attachments: None

National Insurance Number: [Text]
Corporate Web Site: [Text]

Chief Executive Title: [Text]
Chief Executive Name: [Text]
Principal Title: [Text]
Principal Name: [Text]

9. Navigate to the **Financial Profile** section and choose the **Preferred Functional Currency** drop down arrow. Choose a currency.

ORACLE

Edit Profile Change Request: 468003

Change Description: adding organizational details, a new contact and a business classification

Organization Details Contacts Business Classifications

General

* Supplier Name: Enbridge Testing Ltd.
Supplier Number: 400747
Supplier Type: [Dropdown]

Identification

D-U-N-S Number: [Text]
Customer N: 4564433
an: [Text]

Corporate Profile

Year Established: [Text]
Mission Statement: [Text Area]
Year Incorporated: [Text]

Financial Profile

Fiscal Year End Month: [Dropdown]
Current Fiscal Year's Potential Revenue: [Text]

Preferred Functional Currency: [Dropdown]

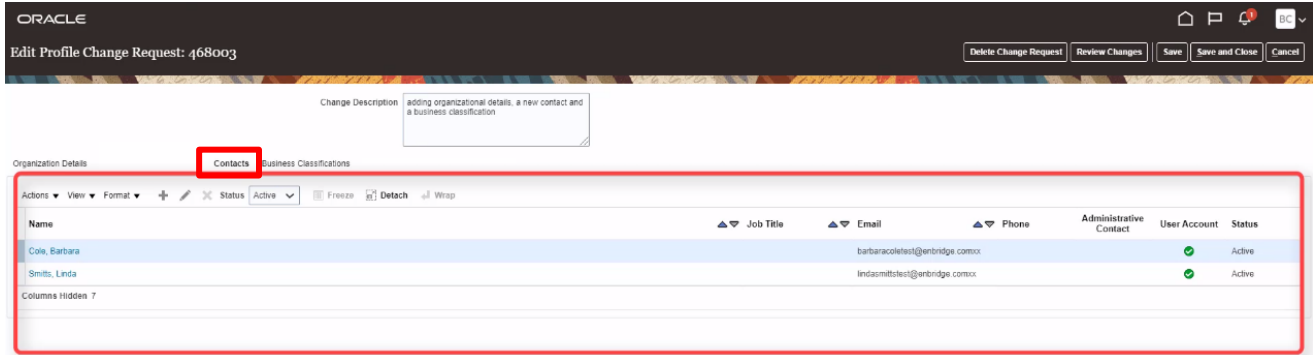
EUR - Pan-European Currency
GBP - Pound Sterling
CAD - Canadian Dollars
USD - US Dollar
JPY - Japanese yen
Search...

Fiscal Year End Month: [Dropdown]
Current Fiscal Year's Potential Revenue: [Text]

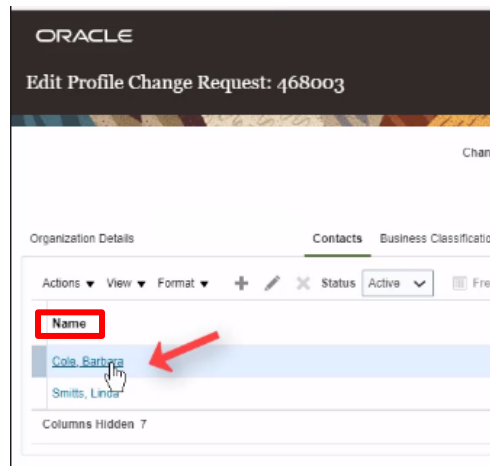
Preferred Functional Currency: CAD

Contacts

The **Contacts** work area lists all of the contacts that have been created for a supplier. This area shows the Supplier Portal role assignments for those contacts with Supplier Portal User Accounts.



10. To edit existing contact information, click the blue hyperlink under a specific contact in the **Name** column to display a secondary contact details window.



11. The **Contact Details** secondary window will display. Review the information in the screenshot below to discover what can be maintained or edited in this section.

- Name, and Job Title
- Phone Numbers, Fax and Email information
- Administrative Contact- maintains the company profile and supplier portal user account access for their organization
- Contact Status- keep a contact **active**, or choose to make them **inactive**
- Contact Address- associate an existing profile address to the contact
- User Account Status- choose to maintain a contact as **active** within the Supplier Portal, or make them **inactive** if they no longer require access
- Supplier Portal Role Assignments- remove existing roles, or add new roles

Edit Contact: Barbara Cole

Salutation

* First Name **b.**

Middle Name **a.**

* Last Name **c.**

Job Title **d.**

Administrative contact

Phone

Mobile

Fax

Email **e.**

Status

Contact Addresses

Actions View Format X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Edmonton	7891-156 Street NW, EDMONTON AB T5E 1K8, CANADA		Ordering; Remit to; RFQ or Bidding	Active

Columns Hidden 5

User Account

If you require access to the Enbridge Supplier Portal, select the 'Create User Account' checkbox. Note that user accounts will be created for those contacts on the registration request. The Enbridge Supplier Portal serves as a tool to allow suppliers to have access to complete critical tasks and reports. These include actions such as submitting an invoice, receiving a PO, updating supplier account information, etc.

Account Status **f.**

User Name

Roles Data Access

Actions View Format X Freeze Detach Wrap

Role	Description
ENB Supplier Self Service Clerk - No Bank ...	ENB Supplier Self Service Clerk - No Bank Access

g.

OK **Cancel**

12. After making any necessary changes, click **OK** to close out the secondary contact details window.

13. To add a new contact, click on the “+” icon, or navigate to the **Actions** dropdown arrow and select **Create**.

ORACLE

Edit Profile Change Request: 468003

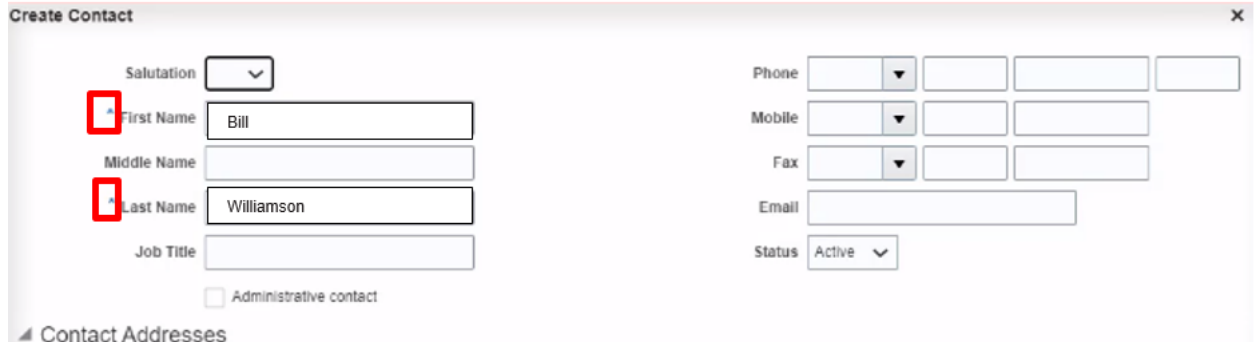
Change Description

Organization Details **Contacts** Business Classifications

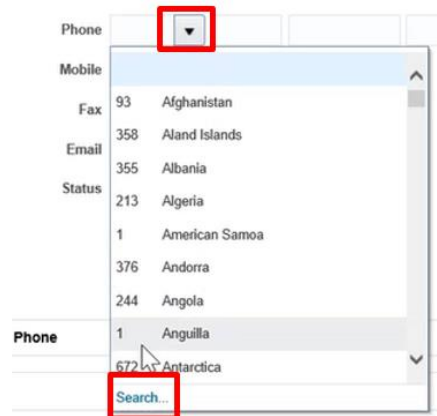
Actions View Format **+** X Status Freeze Detach Wrap

Create Edit Delete

14. A **Create Contact** window will appear. Any fields with a blue asterisk (*) are mandatory fields. Fill in **First Name** and **Last Name** information.



15. To add a **Phone** number, you must first enter a **Phone Country Code**. If you do not know your country's phone code, click on the **Phone** drop down arrow, and then select **search**.



16. The search and select box will populate for the **Phone Country Code**.
- Next to the **Country** field, enter in the name of your country
 - Then select **Search**
 - When the **Phone Country Code** populates for your country, select it
 - Select **OK** to return to the **Create Contact** window enter the phone number



17. Add an **Email** for the contact. A valid email address is necessary if the contact will require access to the Supplier Portal.

Phone 1 780 555 6161

Mobile

Fax

Email **billwilliamson@test.com**

Status Active

18. Associate existing profile addresses to this contact in the **Contact Addresses** section. Click the drop down arrow next to the **Actions** button and choose **Select and Add** from the list of options.

Contact Addresses

Actions View Format Freeze Detach Wrap

Remove Address

Select and Add

19. A menu will display a list of existing company profile addresses. Choose address(es) option(s) and then click **OK** to close the menu.

Please note: For users with **Orders** access to be referenced on a purchasing transaction they must be associated to an address. **Orders** access is linked to **ENB Supplier Customer Service Representative** and **ENB Supplier Sales Representative Roles**.

This means that in order for Enbridge Supply Chain to reference a specific contact on a Purchase Order (PO) and **send the PO Acknowledgement** to that supplier contact in the Supplier Portal, that contact must be associated to the address referenced on the PO. If the supplier contact supports more than one site address, please associate this contact to all applicable addresses. It is recommended that a contact be associated against all available addresses in the Supplier Portal.

Select and Add: Addresses

Search

Address

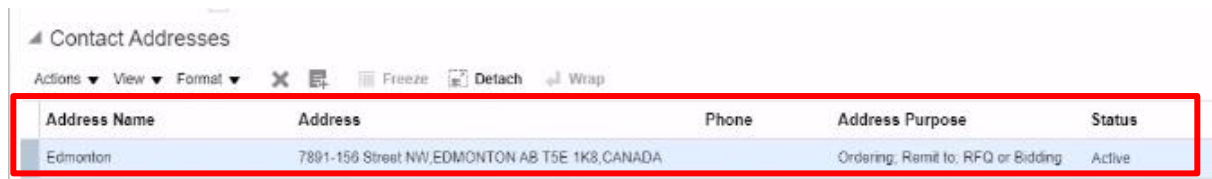
Search Reset

View Format Wrap

Address Name	Address	Address Purpose
Calgary	1564-32 Street NW,CALGARY AB T1X 0L3,...	Ordering; Remit...
Edmonton	7891-156 Street NW,EDMONTON AB T5E 1...	Ordering; Remit...
Houston	123 Main St,HOUSTON, TX	Ordering; Remit...

Apply **OK** Cancel

The selected address(es) will now associate to this contact, as shown below.



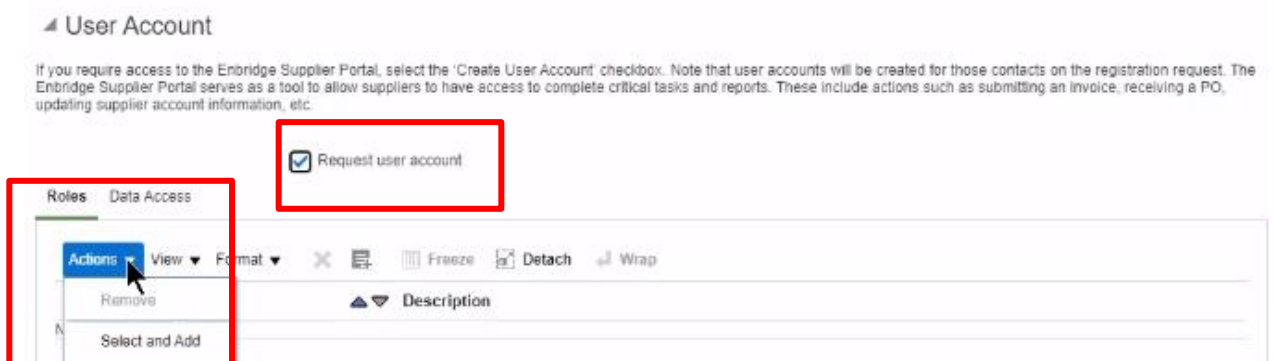
▲ Contact Addresses

Actions View Format X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Edmonton	7801-156 Street NW, EDMONTON AB T5E 1K8, CANADA		Ordering, Remit to, RFQ or Bidding	Active

20. To request access for a contact to the Supplier Portal, check the **Request User Account** box.

To assign Supplier Portal role access, navigate to the **Actions** drop down arrow and choose **Select and Add**.



▲ User Account

If you require access to the Enbridge Supplier Portal, select the 'Create User Account' checkbox. Note that user accounts will be created for those contacts on the registration request. The Enbridge Supplier Portal serves as a tool to allow suppliers to have access to complete critical tasks and reports. These include actions such as submitting an invoice, receiving a PO, updating supplier account information, etc.

Request user account

Roles Data Access

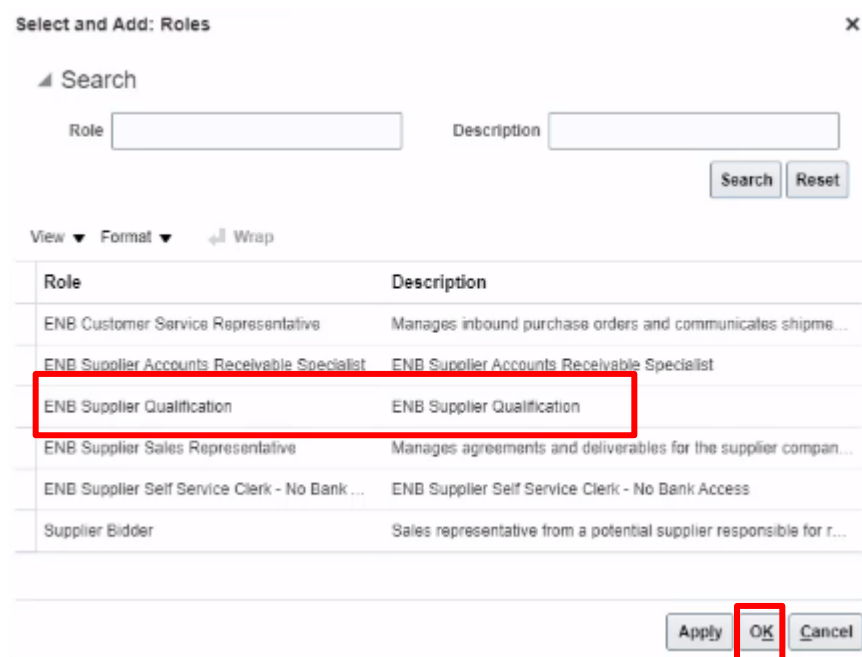
Actions View Format X Freeze Detach Wrap

Remove

Select and Add

Description

21. A **Roles** menu will appear with a list of available roles to assign to a contact, and description of each. Select the applicable role, or roles for the contact. Click **Apply** between each role selection and **OK** when you have finished selecting all necessary roles for the contact.



Select and Add: Roles

Search

Role Description

Search Reset

View Format Wrap

Role	Description
ENB Customer Service Representative	Manages inbound purchase orders and communicates shipme...
ENB Supplier Accounts Receivable Specialist	ENB Supplier Accounts Receivable Specialist
ENB Supplier Qualification	ENB Supplier Qualification
ENB Supplier Sales Representative	Manages agreements and deliverables for the supplier compan...
ENB Supplier Self Service Clerk - No Bank ...	ENB Supplier Self Service Clerk - No Bank Access
Supplier Bidder	Sales representative from a potential supplier responsible for r...

Apply OK Cancel

Please note: Review the **Understanding Supplier Portal Role Assignments** training to ensure you have a clear understanding of the access capabilities for each of the available role assignments. This training is available on our [Oracle Supplier Portal](#) web page.

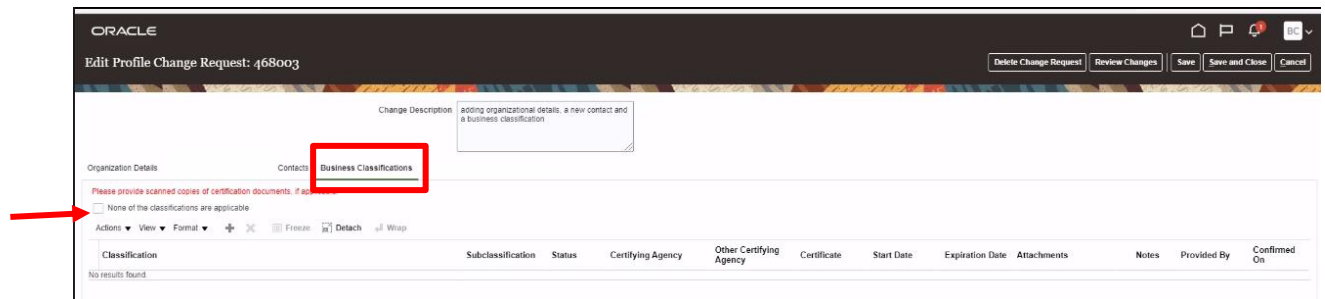
Business Classifications

22. The **Business Classifications** work area supports the tracking of supplier certifications. The **Business Classifications** display includes classification attributes such as:

- **Certifying Agency, Certificate, Start Date and Expiration Date**
- **Attachments and Notes**
- **Status:** current, future dated, or expired

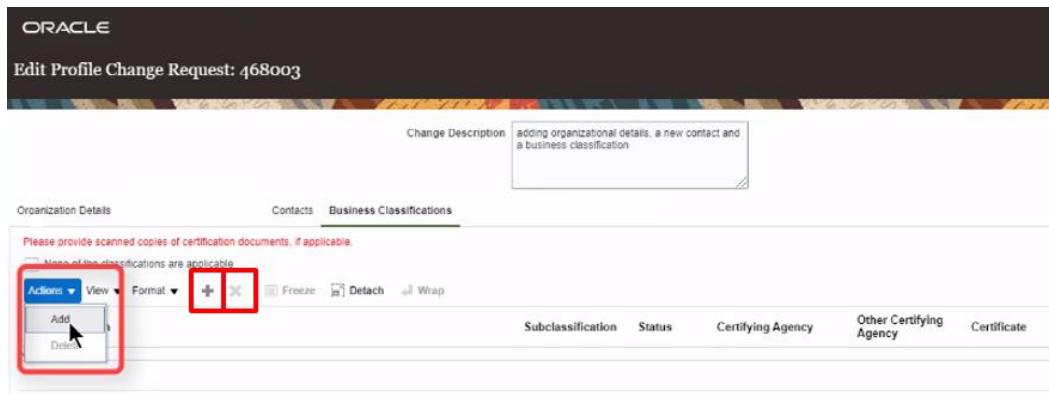
The supplier's administrative contact with an active Supplier Portal user account will be sent notifications concerning any impending classification expirations

Notice the check box below that states **None of the classifications are applicable**. This box cannot be checked if you wish to submit a change request to add a **Business Classification**.

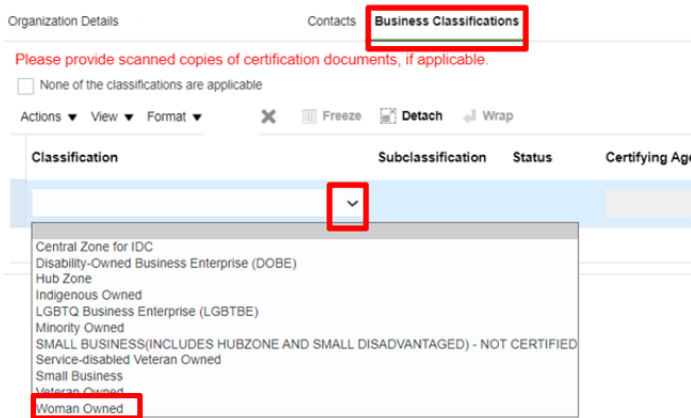


23. To add or edit a certification within the **Business Classifications** work area:

- either click the **Actions** drop down arrow and then select **Add** or click the **Plus (+)** icon to open a window to add your information
- If there were an existing Business Classification, the **Edit** (pencil icon) would appear next to the **Plus (+)** icon. Select the pencil icon and update accordingly
- To delete a Business Classification, click the **Delete (X)** icon to delete the line

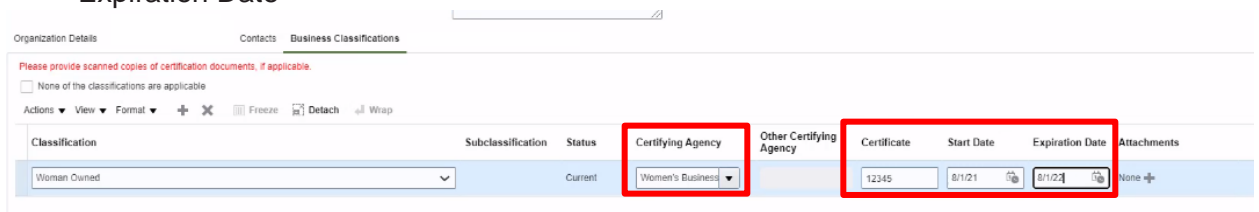


24. To continue to add a business classification: Select the drop arrow under the **Classifications** column to populate a list of options. Select accordingly. For this example, we'll choose **Woman Owned**

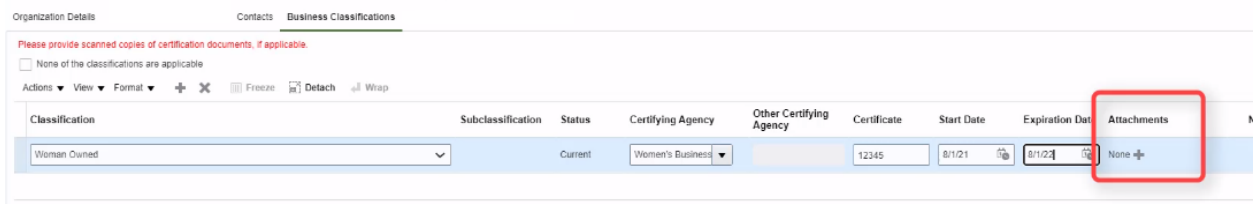


25. Finish filling in the remaining fields:

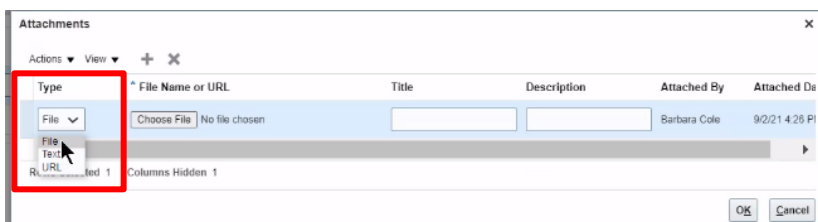
- Certifying Agency
- Certificate Number
- Start Date
- Expiration Date



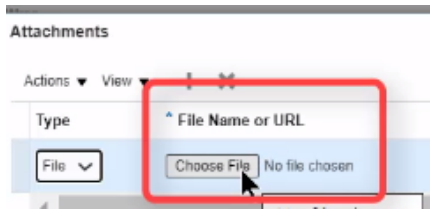
26. **Please provide scanned copies of certification documents, if applicable.** To add an attachment, navigate to the **Plus (+)** icon under the **Attachments** column.



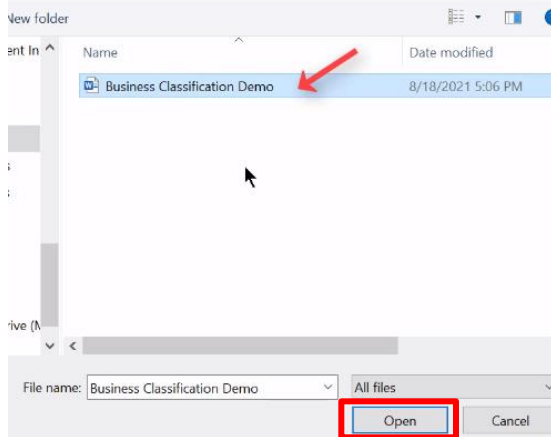
27. An **Attachments** window will display. Select the **Type** drop down arrow to choose from either **File**, **Text**, or **URL**. For this example we will choose a **File** type.



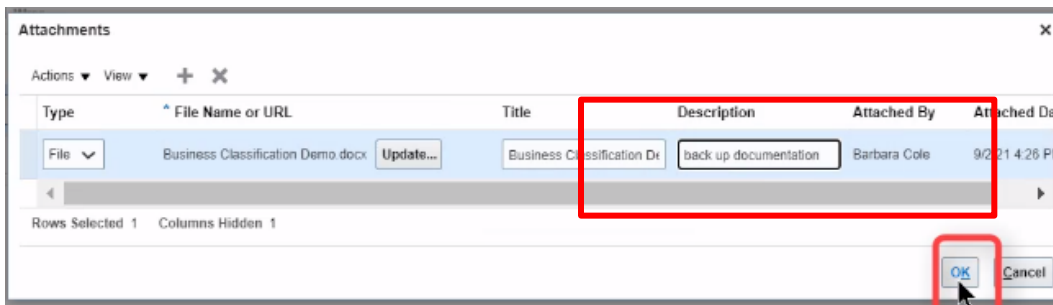
28. Select the **Choose File** button to select a file.



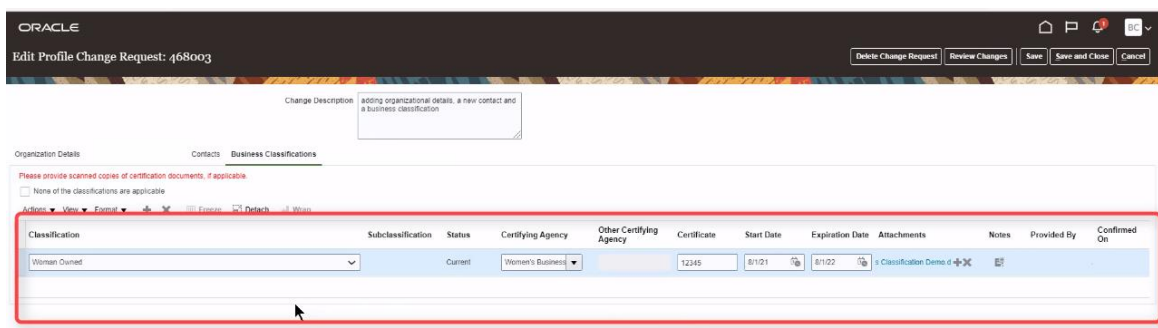
29. Choose the correct file and select **Open**.



30. The file will appear within the **Attachments** window. The **Title** will default to the file name. Adding a **Description** is optional. Click **OK** to close the window.



31. The business classification will display in the work area.

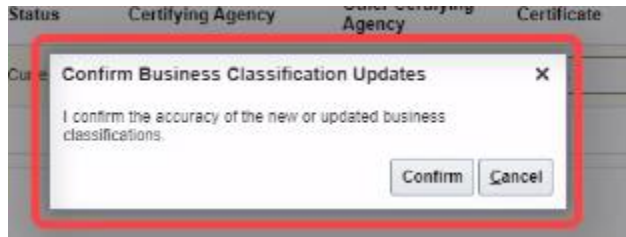


Submit a Profile Change Request

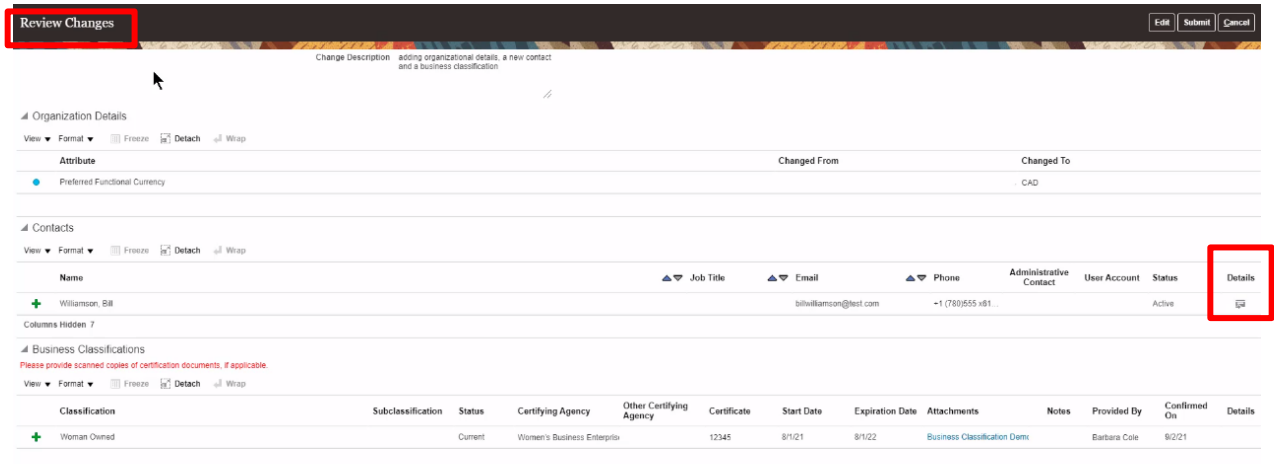
32. When you have completed all additions or edits, click the **Review Changes** button at the top of the page.



33. When a business classification is added or updated, a **Confirm Business Classification Updates** pop will appear. Select **Confirm** to confirm your updates and close the pop up.




34. The **Review Changes** page will display. All changes made within this request will appear in a summary format. Review changes for accuracy. To review the details of the **Contacts** information, navigate to the right side of the screen to the **Details** button.



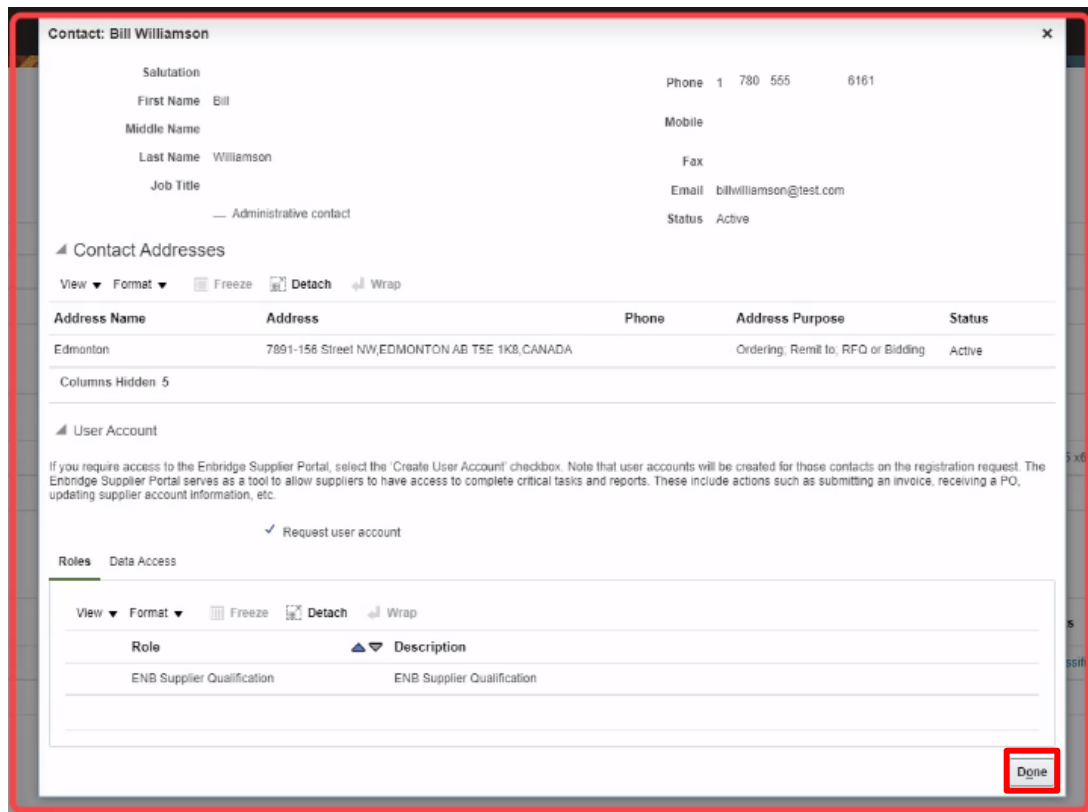
The 'Review Changes' page displays a summary of changes. At the top, a 'Change Description' reads: 'adding organizational details, a new contact, and a business classification'. Below this, there are sections for 'Organization Details', 'Contacts', and 'Business Classifications'. The 'Contacts' section contains a table with columns: Name, Job Title, Email, Phone, Administrative Contact, User Account, Status, and Details. The 'Details' column for the contact 'Williamson, Bill' is highlighted with a red box. Below the 'Contacts' section, the 'Business Classifications' section contains a table with columns: Classification, Subclassification, Status, Certifying Agency, Other Certifying Agency, Certificate, Start Date, Expiration Date, Attachments, Notes, Provided By, Confirmed On, and Details. The 'Details' column for the 'Woman Owned' classification is also visible.

Attribute	Changed From	Changed To
Preferred Functional Currency		CAD

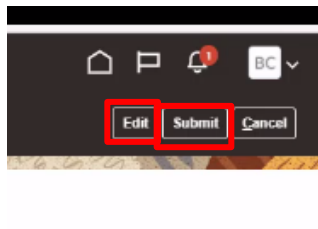
Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Williamson, Bill		billwilliamson@test.com	+1 (780)555-1811			Active	

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On	Details
Woman Owned		Current	Women's Business Enterprise		12345	8/1/21	8/1/22	Business Classification Demo		Barbara Cole	8/2/21	

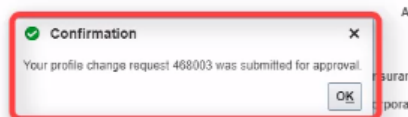
35. A **Contact** details window will display where you can review the details entered in the change request. Click **Done** to close this window.



36. If an error is found in any of the change request information, click the **Edit** button at the top of the page to go back and make corrections. If the information looks accurate, click **Submit** at the top of the page to submit your request.



37. The change request will be confirmed in a new pop up window, showing the change request number. Click **OK** to close the window.



38. Click **Done** at the top of the page to return to the Supplier Portal dashboard page.

