How to Update Supplier Profile

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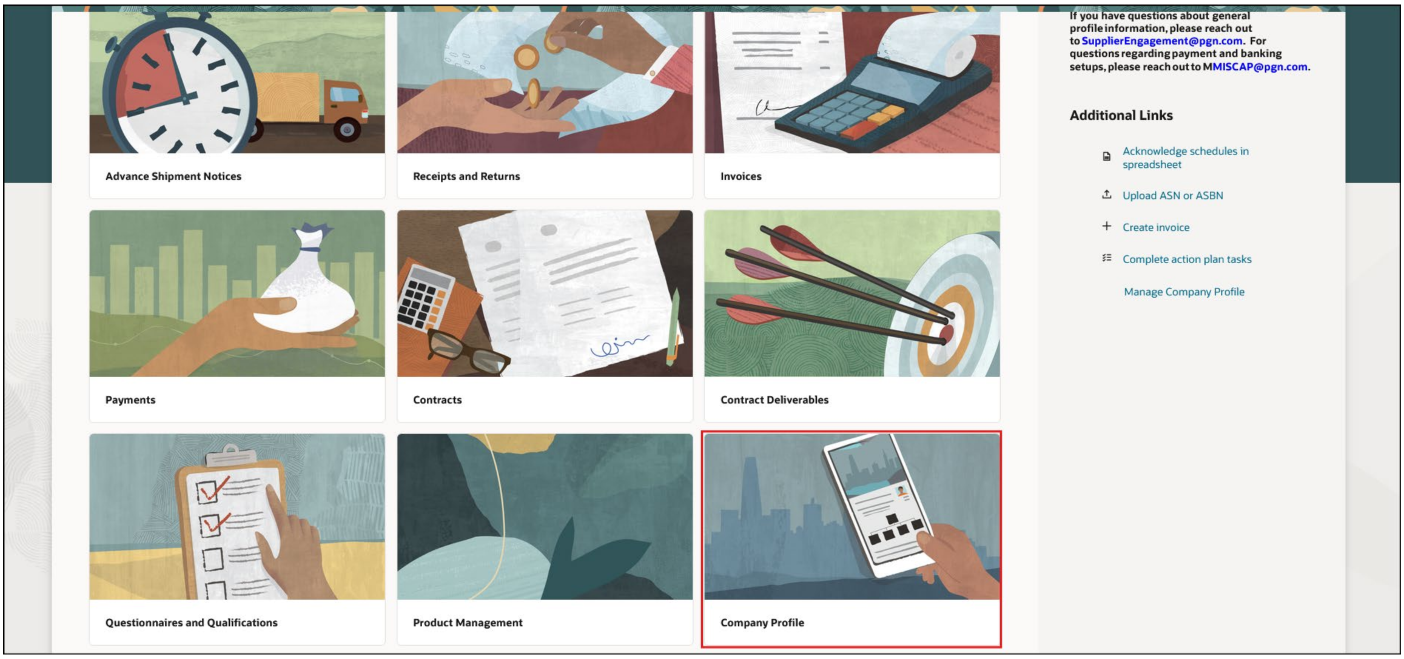
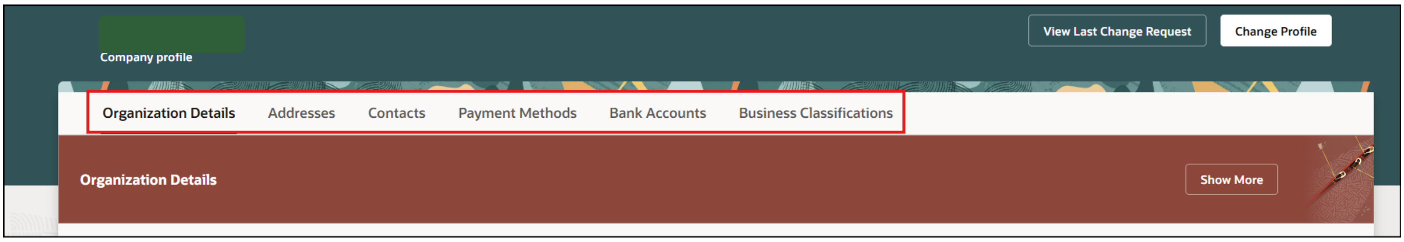
Begin a Profile Change Request

1. Log in to the Oracle Applications Cloud Supplier Portal. Application will populate the below supplier portal landing, click on the "**Company Profile**" tile.

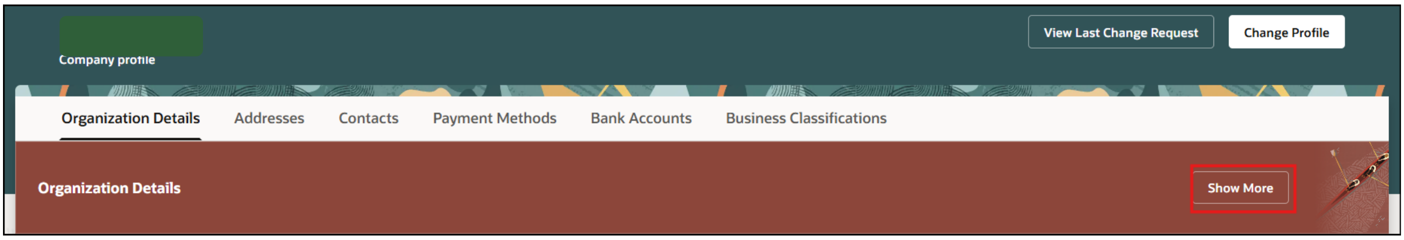


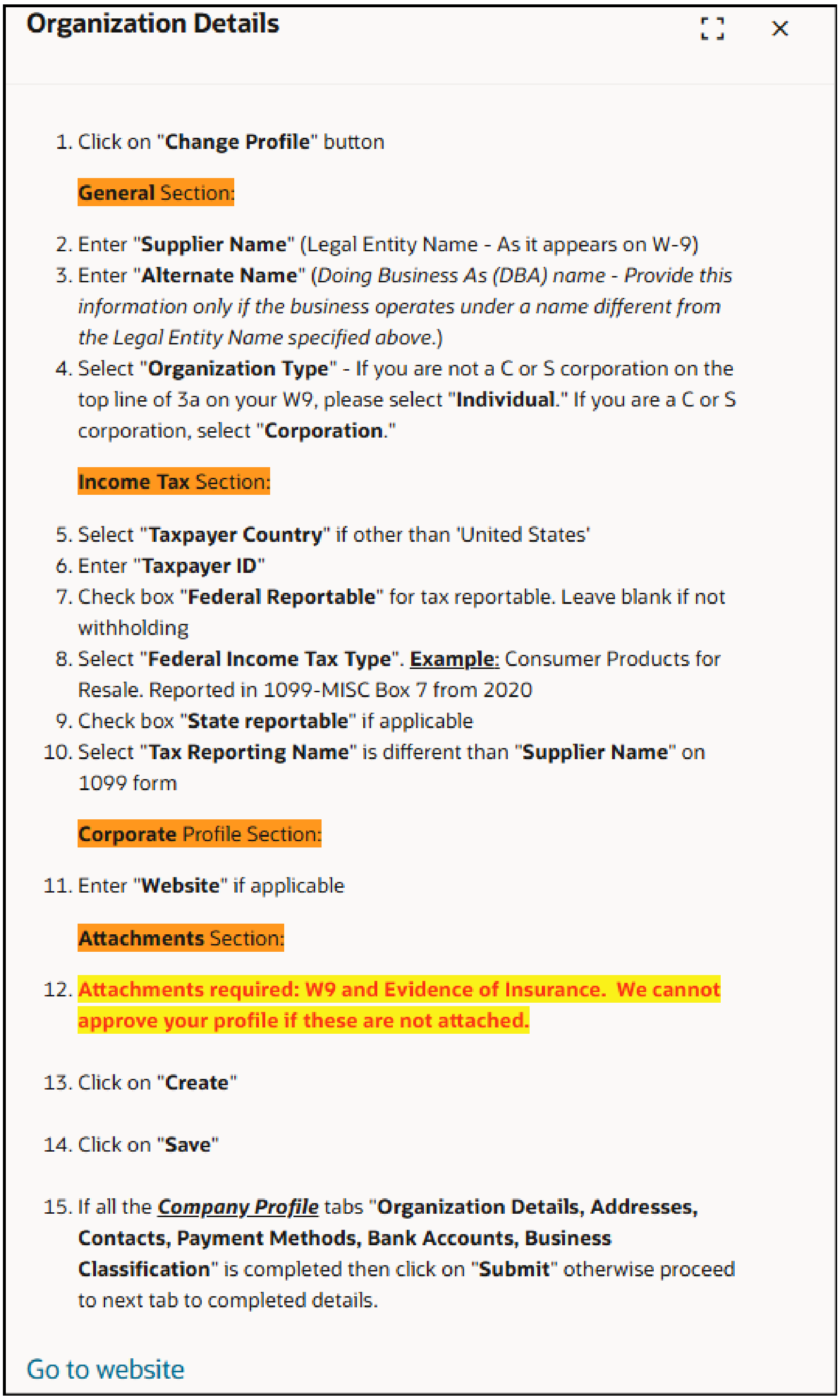
2. The **Company Profile** page will be displayed. There are different profile information tabs available for view and/or edit, **Organizational Details, Addresses, Contacts, Payment Methods, Bank Accounts, and Business Classifications.**



"Organization Details" Change Request from Supplier Portal

To update profile change request for Organization Details. Click on **Show More** to view the steps to be followed.





Organization Details

1. Click on "**Change Profile**" button

General Section:

2. Enter "**Supplier Name**" (Legal Entity Name - As it appears on W-9)
3. Enter "**Alternate Name**" (*Doing Business As (DBA) name - Provide this information only if the business operates under a name different from the Legal Entity Name specified above.*)
4. Select "**Organization Type**" - If you are not a C or S corporation on the top line of 3a on your W9, please select "**Individual**." If you are a C or S corporation, select "**Corporation**."

Income Tax Section:

5. Select "**Taxpayer Country**" if other than 'United States'
6. Enter "**Taxpayer ID**"
7. Check box "**Federal Reportable**" for tax reportable. Leave blank if not withholding
8. Select "**Federal Income Tax Type**". **Example:** Consumer Products for Resale. Reported in 1099-MISC Box 7 from 2020
9. Check box "**State reportable**" if applicable
10. Select "**Tax Reporting Name**" is different than "**Supplier Name**" on 1099 form

Corporate Profile Section:

11. Enter "**Website**" if applicable

Attachments Section:

12. **Attachments required: W9 and Evidence of Insurance. We cannot approve your profile if these are not attached.**

13. Click on "**Create**"

14. Click on "**Save**"

15. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is completed then click on "**Submit**" otherwise proceed to next tab to completed details.

Go to website

Steps to be followed for updating Organization details:

1. Click on "**Change Profile**" button

General Section:

2. Enter "**Supplier Name**" (Legal Entity Name - As it appears on W-9)
3. Enter "**Alternate Name**" (*Doing Business As (DBA) name - Provide this information only if the business operates under a name different from the Legal Entity Name specified above.*)
4. Select "**Organization Type**" - If you are not a C or S corporation on the top line of 3a on your W9, please select "**Individual**." If you are a C or S corporation, select "**Corporation**."

Income Tax Section:

5. Select "**Taxpayer Country**" if other than 'United States'

6. Enter "**Taxpayer ID**"
7. Check box "**Federal Reportable**" for tax reportable. Leave blank if not withholding
8. Select "**Federal Income Tax Type**." **Example:** Consumer Products for Resale. Reported in 1099-MISC Box 7 from 2020
9. Check box "**State reportable**" if applicable
10. Select "**Tax Reporting Name**" is different than "**Supplier Name**" on 1099 form

Corporate Profile Section:

11. Enter "**Website**" if applicable

Attachments Section:

12. **Attachments required: W9 and Evidence of Insurance. We cannot approve your profile if these are not attached.**

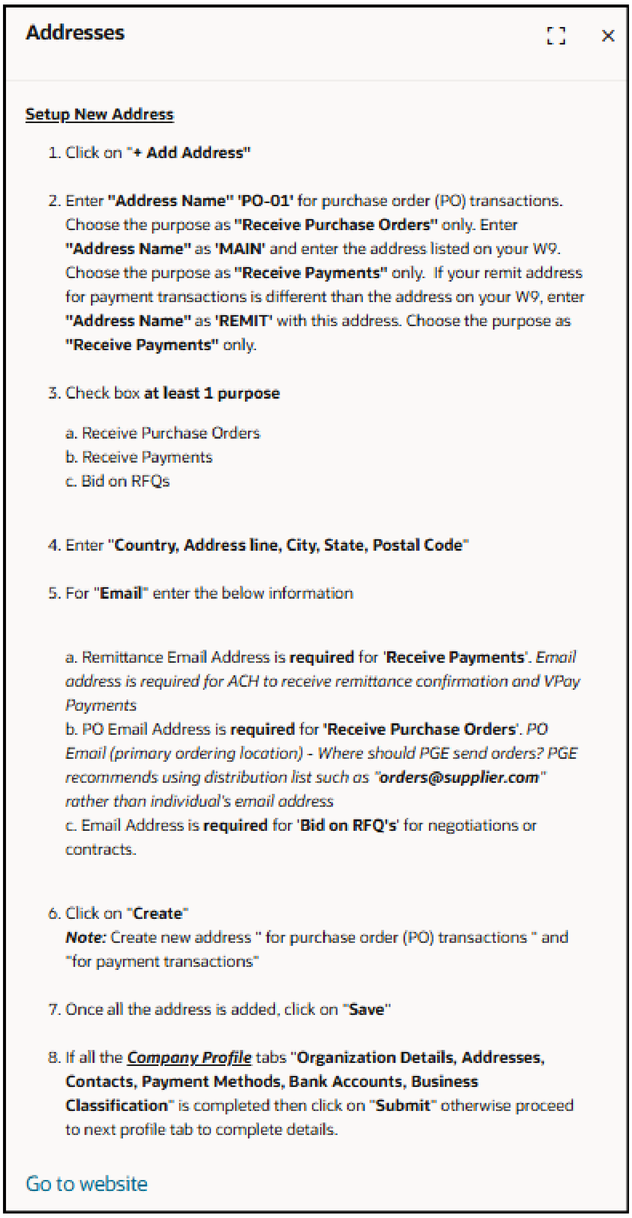
13. Click on "**Create**"

14. Click on "**Save**"

15. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is completed then click on "**Submit**" otherwise proceed to next tab to complete the details.

“Addresses” Request from Supplier Portal

To Add new address, click on **Show More** to view the steps to be followed.



Addresses

Setup New Address

1. Click on "**+ Add Address"**

2. Enter **"Address Name" 'PO-01'** for purchase order (PO) transactions. Choose the purpose as **"Receive Purchase Orders"** only. Enter **"Address Name"** as **'MAIN'** and enter the address listed on your W9. Choose the purpose as **"Receive Payments"** only. If your remit address for payment transactions is different than the address on your W9, enter **"Address Name"** as **'REMIT'** with this address. Choose the purpose as **"Receive Payments"** only.

3. Check box **at least 1 purpose**

   a. Receive Purchase Orders
   b. Receive Payments
   c. Bid on RFQs

4. Enter "**Country, Address line, City, State, Postal Code**"

5. For "**Email**" enter the below information

   a. Remittance Email Address is **required** for '**Receive Payments**'. *Email address is required for ACH to receive remittance confirmation and VPay Payments*
   b. PO Email Address is **required** for **'Receive Purchase Orders**'. *PO Email (primary ordering location) - Where should PGE send orders? PGE recommends using distribution list such as "**orders@supplier.com**" rather than individual's email address*
   c. Email Address is **required** for '**Bid on RFQ's**' for negotiations or contracts.

6. Click on "**Create**"
   Note: Create new address " for purchase order (PO) transactions " and "for payment transactions"

7. Once all the address is added, click on "**Save**"

8. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is completed then click on "**Submit**" otherwise proceed to next profile tab to complete details.

Go to website

Steps to be followed for adding New Addresses:

1. Click on **"+ Add Address"**

2. Enter **"Address Name" 'PO-01'** for purchase order (PO) transactions. Choose the purpose as **"Receive Purchase Orders"** only. Enter **"Address Name"** as **'MAIN'** and enter the address listed on your W9. Choose the purpose as **"Receive Payments"** only. If your remit address for payment transactions is different than the address on your W9, enter **"Address Name"** as **'REMIT'** with this address. Choose the

purpose as **"Receive Payments"** only.

3. Check box **at least 1 purpose**
    a. Receive Purchase Orders
    b. Receive Payments
    c. Bid on RFQs

4. Enter **"Country, Address line, City, State, Postal Code"**

5. For **"Email"** enter the below information

a. Remittance Email Address is **required** for **'Receive Payments'**. *Email address is required for ACH to receive remittance confirmation, and VPay Payments*
b. PO Email Address is **required** for **'Receive Purchase Orders'**. *PO Email (primary ordering location) - Where should PGE send orders? PGE recommends using distribution list such as* ***"orders@supplier.com"*** *rather than individual's email address*
c. Email Address is **required** for **'Bid on RFQ's'** for negotiations or contracts.

6. Click on **"Create"**
    ***Note**:* Create new address " for purchase order (PO) transactions " and "for payment transactions"

7. Once all the address is added, click on "**Save**"

3. If all the ***<u>Company Profile</u>*** tabs **"Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification"** are complete then click on "**Submit**" otherwise proceed to the next profile tab to complete the details.

"Contacts" Request from Supplier Portal

To Add New Contact, click on **Show More** to view the steps to be followed.

Setup New Contact:

1. Click on '**+Add Contact**'

2. Enter New Contact details based on address entered in '**Addresses**' TAB, so contact details are mapped to correct addresses - (**1.** Require Remittance Contact and Email for 'Receive Payments'. **2.** Require PO Email Contact and Email for 'Receive Purchase Orders'. **3.** Require Contact and Email for 'Bid on RFQ's' for negotiations or contracts)

3. Enter "**First Name, Last Name**"

4. Enter "**Email**"

5. Check box "**Administrative contact**" if the contact is the admin

6. Enter "**Ph#**"

7. Select "**Contact Address**" from the drop down "***Select Appropriate Remittance, PO and Admin Address Based on Address Created to associate the contact***"

8. Check box "**Request User account**" and select appropriate based on the role of the contact (Example:

Supplier Portal User Profile	Oracle Role (Proposed)
Supplier Portal Admin	PGE Supplier Portal Sales Representative PGE Supplier Portal Customer Service Represent PGE Supplier Portal PO Matched Invoice Speciali PGE Supplier Portal Bidder PGE Supplier Portal Self Service Profile Manager
Supplier Portal Sourcing	PGE Supplier Portal Bidder
Supplier Portal Contract	PGE Supplier Portal Sales Representative
Supplier Portal Accounts Receivable	PGE Supplier Portal PO Matched Invoice Speciali
Supplier Portal Company Profile	PGE Supplier Portal Self Service Profile Manager
Supplier Portal Contact Maintenance	PGE Supplier Portal Self Service Profile Manager

8. Click on "**Create**"

9. Click on "**Save**"

10. **Additional Contacts:**

Create additional contacts if any of the below is applicable:

a. Require remittance contact and email to receive payment remittance confirmation and create additional contact if VPay payment confirmation email is different
b. Require PO contact and email to receive purchase orders PDF email (primary ordering location) - *Where should PGE send orders? PGE recommends using distribution list such as "**orders@supplier.com**" rather than individual's email address*
c. Require email contact for sourcing (negotiations or contracts)).

Please list any additional contacts pertinent to conducting business with PGE in this section. Email address must be unique for additional contacts. ***(Do not use the same email address that was used for the primary contact or other additional contacts).***

11. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is completed then click on "**Submit**" otherwise proceed to next tab to completed details.

Steps to be followed for adding New Contact:

1. Click on **'+Add Contact'**

2. Enter New Contact details based on address entered in **'Addresses'** TAB, so contact details are mapped to correct addresses - (**1.** Require Remittance Contact and Email for 'Receive Payments'. **2.** Require PO Email Contact and Email for 'Receive Purchase Orders'. **3.** Require Contact

and Email for 'Bid on RFQ's' for negotiations or contracts)

3. Enter **"First Name, Last Name"**

4. Enter **"Email"**

4. Check box **"Administrative contact"** if the contact is the portal admin

5. Enter **"Ph#"**

6. Select **"Contact Address"** from the drop down **"*Select Appropriate Remittance, PO and Admin Address Based on Address Created to associate the contact*"**

7. Check box **"Request User account"** and select appropriate based on the role of the contact (Example:

Supplier Portal User Profile	Oracle Role (Proposed)
Supplier Portal Admin	PGE Supplier Portal Sales Representative PGE Supplier Portal Customer Service Representative PGE Supplier Portal PO Matched Invoice Specialist PGE Supplier Portal Bidder PGE Supplier Portal Self Service Profile Manager
Supplier Portal Sourcing	PGE Supplier Portal Bidder
Supplier Portal Contract	PGE Supplier Portal Sales Representative
Supplier Portal Accounts Receivable	PGE Supplier Portal PO Matched Invoice Specialist
Supplier Portal Company Profile	PGE Supplier Portal Self Service Profile Manager
Supplier Portal Contact Maintenance	PGE Supplier Portal Self Service Profile Manager

8. Click on **"Create"**

5. Click on **"Save"**

<u>**Additional Contacts:**</u>

Create additional contacts if any of the below is applicable:

a. Require remittance contact and email to receive payment remittance confirmation and create additional contact if VPay payment confirmation email is different

b. Require PO contact and email to receive purchase orders PDF email (primary ordering location) - *Where should PGE send orders? PGE recommends using distribution list such as **"orders@supplier.com"** rather* *than individual's email address*

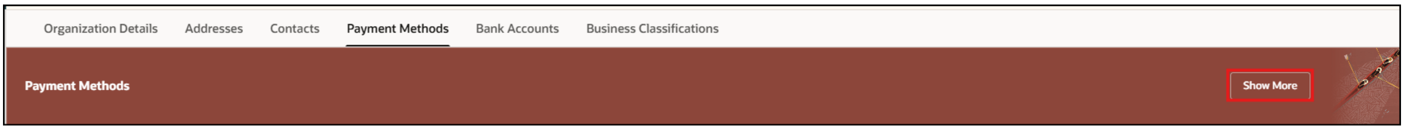
c. Require email contact for sourcing (negotiations or contracts).

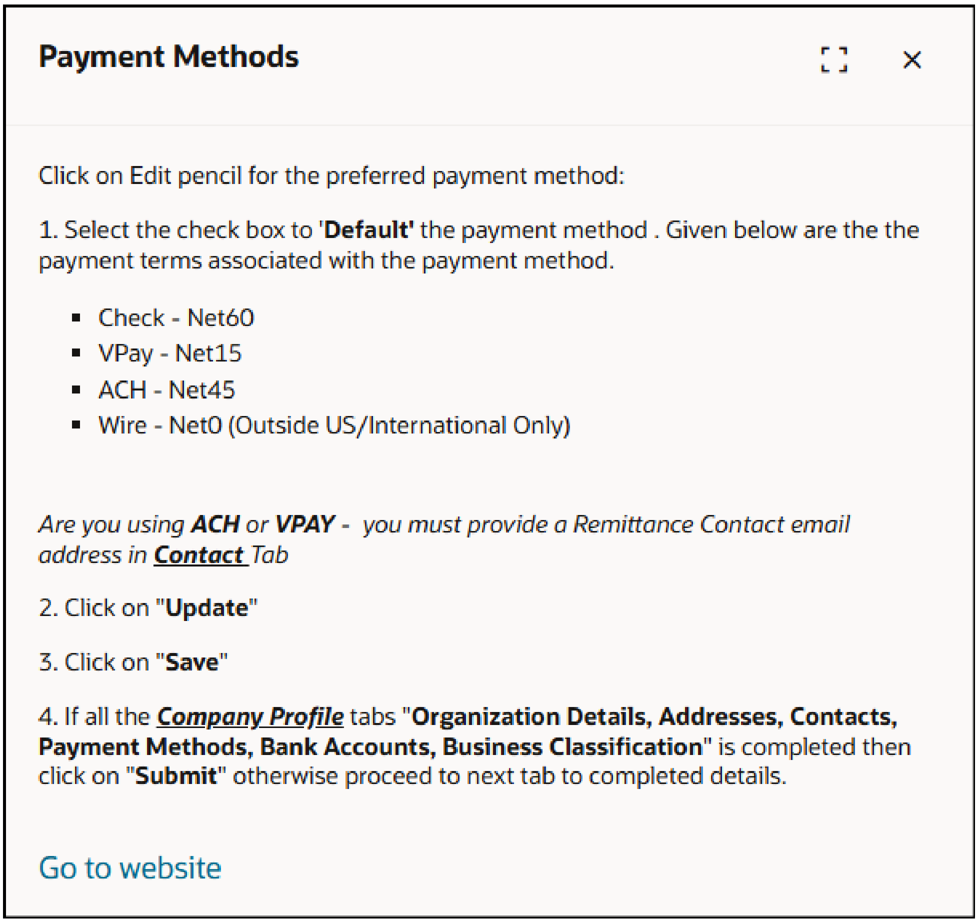
6. Please list any additional contacts pertinent to conducting business with PGE in this section. Email address must be unique for additional contacts**. *(Do not use the same email address that was used for primary contact or other additional contacts).***

7. If all the ***Company Profile*** **tabs "Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification"** is complete then click on **"Submit"** otherwise proceed to next tab to complete the details.

“Payment Methods” Request from Supplier Portal

To change the payment method, click on **Show More** to view the steps to be followed.





Steps to be followed for changing Payment Methods:

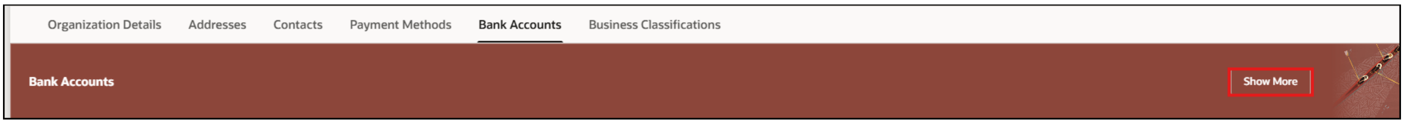
Click on Edit pencil for the preferred payment method:

8. Select the check box to **'Default'** the payment method. Given below are the payment terms associated with the payment method.
   - Check - Net60
   - VPay - Net15
   - ACH - Net45
   - Wire - Net0 (Outside US/International Only)

   *Are you using **ACH** or **VPAY** - you must provide a Remittance Contact email address in Contact Tab*
9. Click on **"Update"**
10. Click on **"Save"**
11. If all the ***Company Profile*** tabs **"Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification"** is complete then click on **"Submit"** otherwise proceed to next tab to complete the details.

"Bank Accounts" Request from Supplier Portal

To Add New Bank Account, click on **Show More** to view the steps to be followed.



Bank Accounts

Please follow below instructions to add new bank account. If the Payment method is '**CHECK**' or '**VPAY**' then do not add bank account details.

For '**ACH**' and International '**WIRE**' payments please follow instructions below.

1. Click on the "**Change Profile' icon**"

2. Click on the "**+ Add Bank Account**"

3. For the "**Country**" field, select the bank account country from the list of values. Please enter any three characters for more accurate results. Example: United States

4. Enter the account number in the "**Account Number**" field.

5. Currency is optional.

6. In the "**Routing Number**" field, enter the routing number and select it from the list of values. If routing number is not available then select '**000000000**' and provide details mentioned in step# 7 and 8.

7. In the "**Enter New Routing Number**" type in the new routing number. **Example**: 043000261.

8. In the "**Enter New Bank**" type in the new bank name. **Example**: Bank of America.

9. For '**WIRE**' international payments check box "**Allow international payments".** Supported only for outside US payments.

10. Check box '**Primary'** if more than 1 more bank account is added.

11. Under "**Attach Supporting Documents**", please attach either a voided check or bank letter on your bank's letterhead for the bank account verification. Please note that the bank account will be rejected without appropriate supporting documents.

12. Click "**Create**" once all the fields are added.

Please reach out to miscap@pgn.com if you need any help or information.

Required to attach bank letter and scanned check document.

12. Click "**Save**"

13. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is completed then click on "**Submit**" otherwise proceed to next tab to completed details.

Go to website

Steps to be followed for adding New Bank Account:

Please follow below instructions to add new bank account. If the Payment method is '**CHECK**' or '**VPAY**' then do not add bank account details.

For '**ACH**' and International '**WIRE**' payments please follow instructions below.

1. Click on the "**Change Profile' icon**"

2. Click on the "**+ Add Bank Account**"

3. For the "**Country**" field, select the bank account country from the list of values. Please enter any three characters for more accurate results. Example: United States

4. Enter the account number in the "**Account Number**" field.

5. Currency is optional.

6. In the "**Routing Number**" field, enter the routing number and select it from the list of values. If routing number is not available, then select '**000000000**' and provide details mentioned in step# 7 and 8.

7. In the "**Enter New Routing Number**" type in the new routing number. **Example**: 043000261.

8. In the "**Enter New Bank**" type in the new bank name. **Example**: Bank of America,

9. For '**WIRE**' international payments check box "**Allow international payments".** Supported only for outside US payments.

10. Check box '**Primary'** if more than 1 more bank account is added.

11. Under "**Attach Supporting Documents**", please attach either a voided check or bank letter on your bank's letterhead for the bank account verification. Please note that the bank account will be rejected without appropriate supporting documents.

12. Click "**Create**" once all the fields are added.

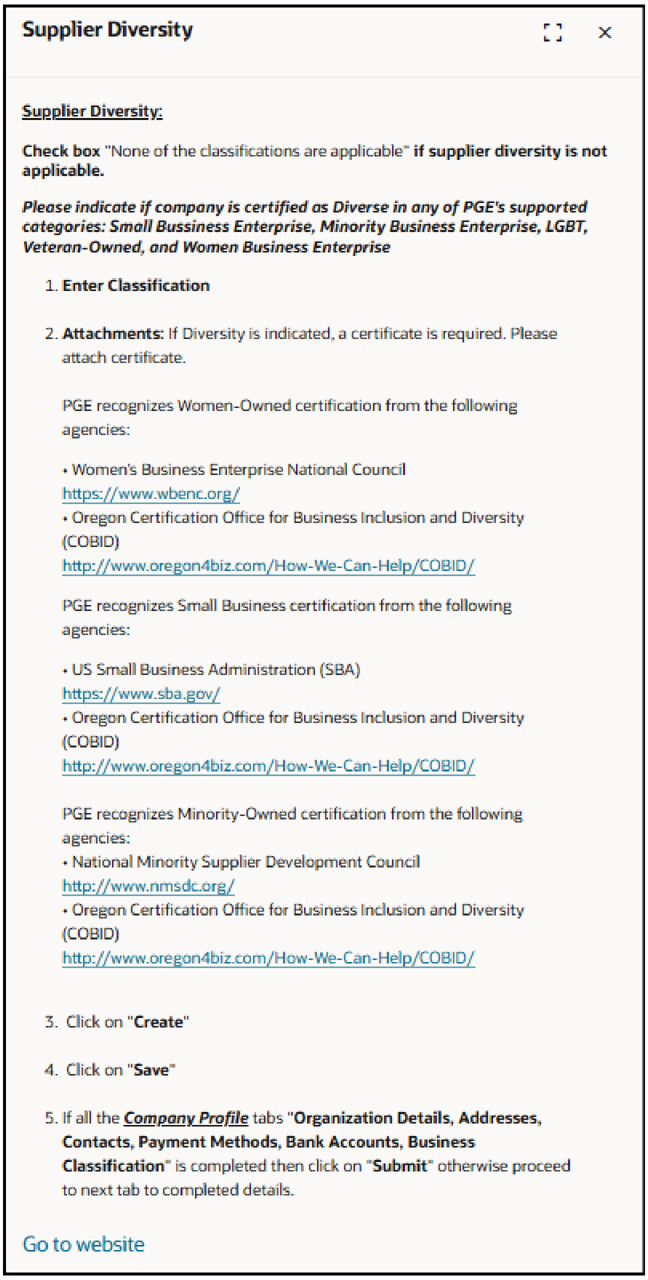
Please reach out to miscap@pgn.com if you need any help or information.

Required to attach bank letter and scanned check document.

12. Click "**Save**"

13. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is complete then click on "**Submit**", otherwise proceed to next tab to complete the details.

"Business Classifications" Change Request from Supplier Portal



Steps to be followed for adding Business classifications:

<u>Supplier Diversity:</u>

Check box "None of the classifications are applicable" **if supplier diversity is not applicable.**

Please indicate if company is certified as Diverse in any of PGE's supported categories: Small Business Enterprise, Minority Business Enterprise, LGBT, Veteran-Owned, and Women Business Enterprise

1. **Enter Classification**

2. **Attachments:** If Diversity is indicated, a certificate is required. Please attach certificate.

   PGE recognizes Women-Owned certification from the following agencies:

• Women's Business Enterprise National Council
https://www.wbenc.org/
• Oregon Certification Office for Business Inclusion and Diversity (COBID)
http://www.oregon4biz.com/How-We-Can-Help/COBID/

PGE recognizes Small Business certification from the following agencies:

• US Small Business Administration (SBA)
https://www.sba.gov/
• Oregon Certification Office for Business Inclusion and Diversity (COBID)
http://www.oregon4biz.com/How-We-Can-Help/COBID/

PGE recognizes Minority-Owned certification from the following agencies:
• National Minority Supplier Development Council
http://www.nmsdc.org/
• Oregon Certification Office for Business Inclusion and Diversity (COBID)
http://www.oregon4biz.com/How-We-Can-Help/COBID/

3. Click on "**Create**"

4. Click on "**Save**"

5. If all the ***Company Profile*** tabs "**Organization Details, Addresses, Contacts, Payment Methods, Bank Accounts, Business Classification**" is complete then click on "**Submit**".