



REVIEWING AND UPDATING CONTACTS

SUPPLIER QUICK GUIDE

Your listed company contacts hold high-level administrative access, including the ability to update banking details, payment methods, and corporate profile information. Regularly reviewing your active contact list helps protect your account from unauthorized changes, ensures sensitive financial communications reach the right people, and prevents payment delays caused by outdated user access.

REVIEWING COMPANY CONTACTS

1. After logging in using [Workday Central Login](#), select **Grand Valley State University** from your **Customer Directory** or select **Manage** next to the profile request from Grand Valley State University from your **Dashboard**

Company Directory:

CUSTOMER	SUPPLIER	RFPS AND AUCTIONS	CONTRACTS	FORMS	ACTION ITEMS
Grand Valley State University	test	0	0	1	0

Dashboard:

ISSUING COMPANY	SUPPLIER COMPANY	STATUS	ACTIONS
Grand Valley State University	test	Submitted	MANAGE VIEW PUBLIC EVENT...

2. Scroll down to the **Contacts** section of your onboarding information. Click to expand the **Contact Information** for any of your listed contacts to review that the information is accurate.

Strategic Sourcing

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Manual Manual

General Profile >

Forms

Purchase Orders

Invoices

Payments

Catalogs

CONTACTS

FIRST NAME * LAST NAME *

> CONTACT INFORMATION

FIRST NAME * LAST NAME *

TEST CONTACT

> CONTACT INFORMATION

FIRST NAME * LAST NAME *

TEST CONTACT

> CONTACT INFORMATION

UPDATING COMPANY CONTACTS

1. If changes are needed, click **Edit** at the top of the onboarding information screen.

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ONBOARDING INFORMATION MESSAGE CENTER EDIT

New Suppliers: please "Edit" the Supplier Onboarding form, confirm your information is correct, and click "Submit". Please attach your current W-9 in the "Attachments" section of your registration. If you are a Sole-proprietor, we require the owners SSN or personal EIN, we cannot use the business EIN for verification. Please reach out to suppliers@gvsu.edu with questions.

Existing Suppliers: Click "Edit" to change any company information. Click "Submit" once you have completed your changes.

SUPPLIER INFORMATION

2. Click **Edit** in the message that appears next

EDIT YOUR PROFILE X

To ensure your customer has access to your supplier profile, resubmit it after you finish editing.

CANCEL EDIT

3. Scroll down to the **Contacts** section. You are able to delete any contacts that are not the primary contact on the account by clicking **DELETE**.

The screenshot shows the 'Grand Valley State University' profile page with the 'IN PROGRESS' status. The left sidebar contains links for 'General Profile', 'Forms', 'Purchase Orders', 'Invoices', 'Payments', and 'Catalogs'. The main content area displays the 'CONTACT INFORMATION' section with fields for 'FIRST NAME *' (containing 'TEST'), 'LAST NAME *' (containing 'CONTACT'), 'EMAIL *' (containing 'purchasing@gvsu.edu'), 'PHONE COUNTRY' (a dropdown menu), 'PHONE' (a text field), 'PHONE DEVICE TYPE' (a dropdown menu), and 'NOTIFICATIONS' (a checkbox for 'Receive email notifications for events that match your commodity codes' which is checked). A red box highlights the 'DELETE' button in the bottom right corner.

4. Click **DELETE** in the message that appears next

The screenshot shows a 'DELETE SUPPLIER CONTACT' dialog box with a warning icon and a close button. The text inside reads: 'Are you sure you want to delete "TEST CONTACT" supplier contact? This will remove access to the Supplier Onboarding Form in Supplier Portal'. There are two buttons: 'CLOSE' and 'DELETE'. The 'DELETE' button is highlighted with a red box.

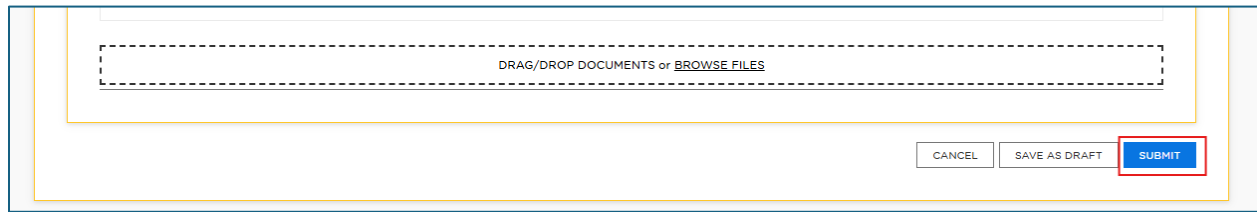
5. To add a new contact, click **ADD CONTACT** at the top of the **Contacts** section.

The screenshot shows the 'CONTACTS' section of the profile page. It features a header with 'CONTACTS' and an 'ADD CONTACT' button highlighted with a red box. Below the header, there are input fields for 'FIRST NAME *' and 'LAST NAME *'.

6. Fill in the required fields. At a minimum, first name, last name and email address are required.

The screenshot shows the 'CONTACTS' section with the form filled out. The 'FIRST NAME *' field contains 'Enter contact first name' and has a red error message 'Error: This field is required'. The 'LAST NAME *' field contains 'Enter contact last name'. The 'EMAIL *' field contains 'Enter contact email'. The 'PHONE COUNTRY' and 'PHONE' fields are empty. The 'PHONE DEVICE TYPE' field is a dropdown menu. The 'NOTIFICATIONS' section has a checked checkbox for 'Receive email notifications for events that match your commodity codes'. A 'DELETE' button is visible in the bottom right corner.

7. Once all changes are complete, click **SUBMIT** at the bottom of the screen.



The screenshot shows a web interface for document management. At the top, there is a light blue header bar. Below it is a large white rectangular area with a dashed border, intended for dragging and dropping documents. Inside this area, the text "DRAG/DROP DOCUMENTS or [BROWSE FILES](#)" is centered. To the right of this area, there are three buttons: "CANCEL", "SAVE AS DRAFT", and "SUBMIT". The "SUBMIT" button is highlighted with a red border, indicating it is the next step in the process.