

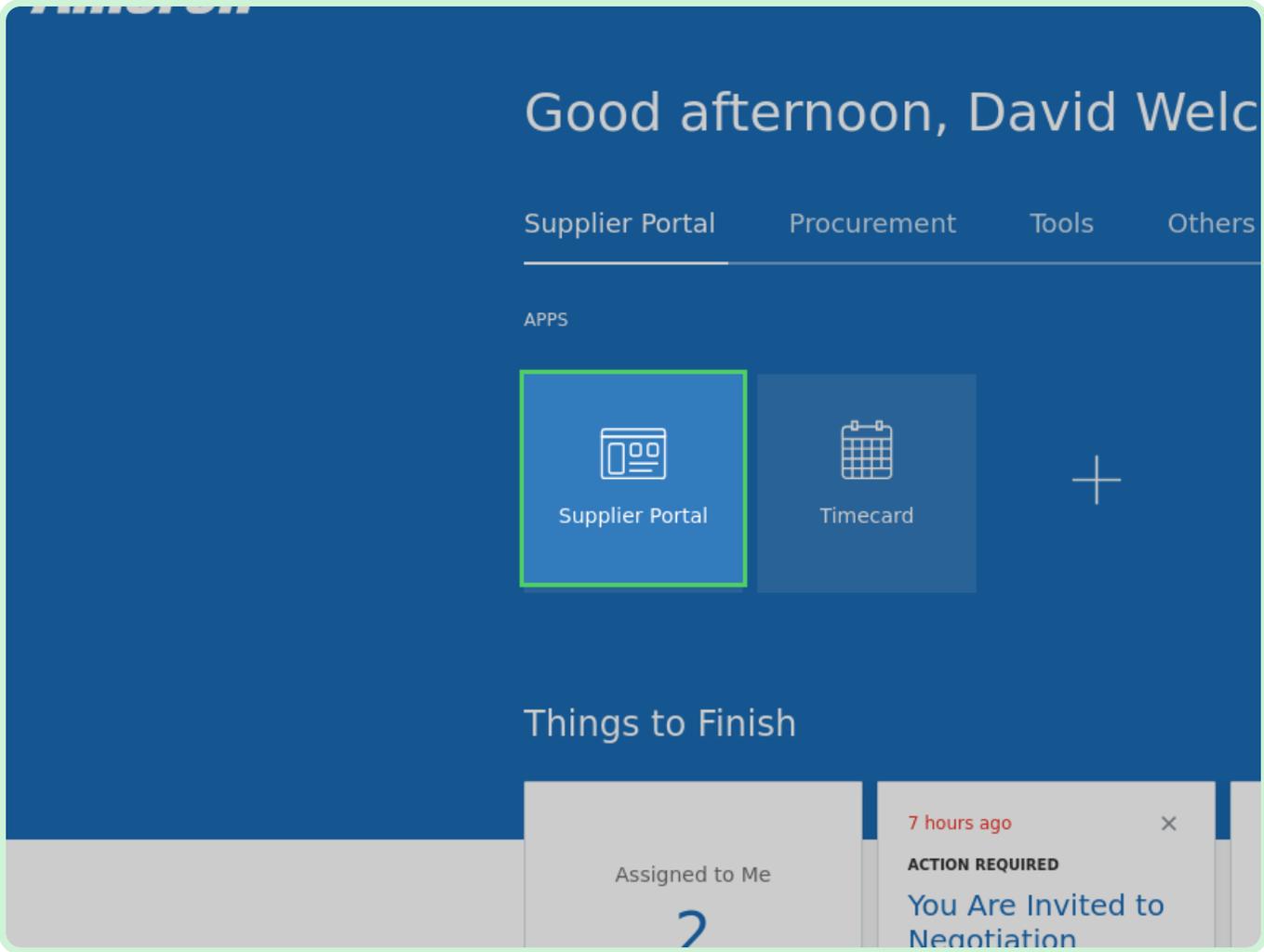
# Suppliers – Add or Update Contact Details for Supplier

🕒 Time to Completion: **6 minutes**

You will learn to make changes to the contact details of a supplier.

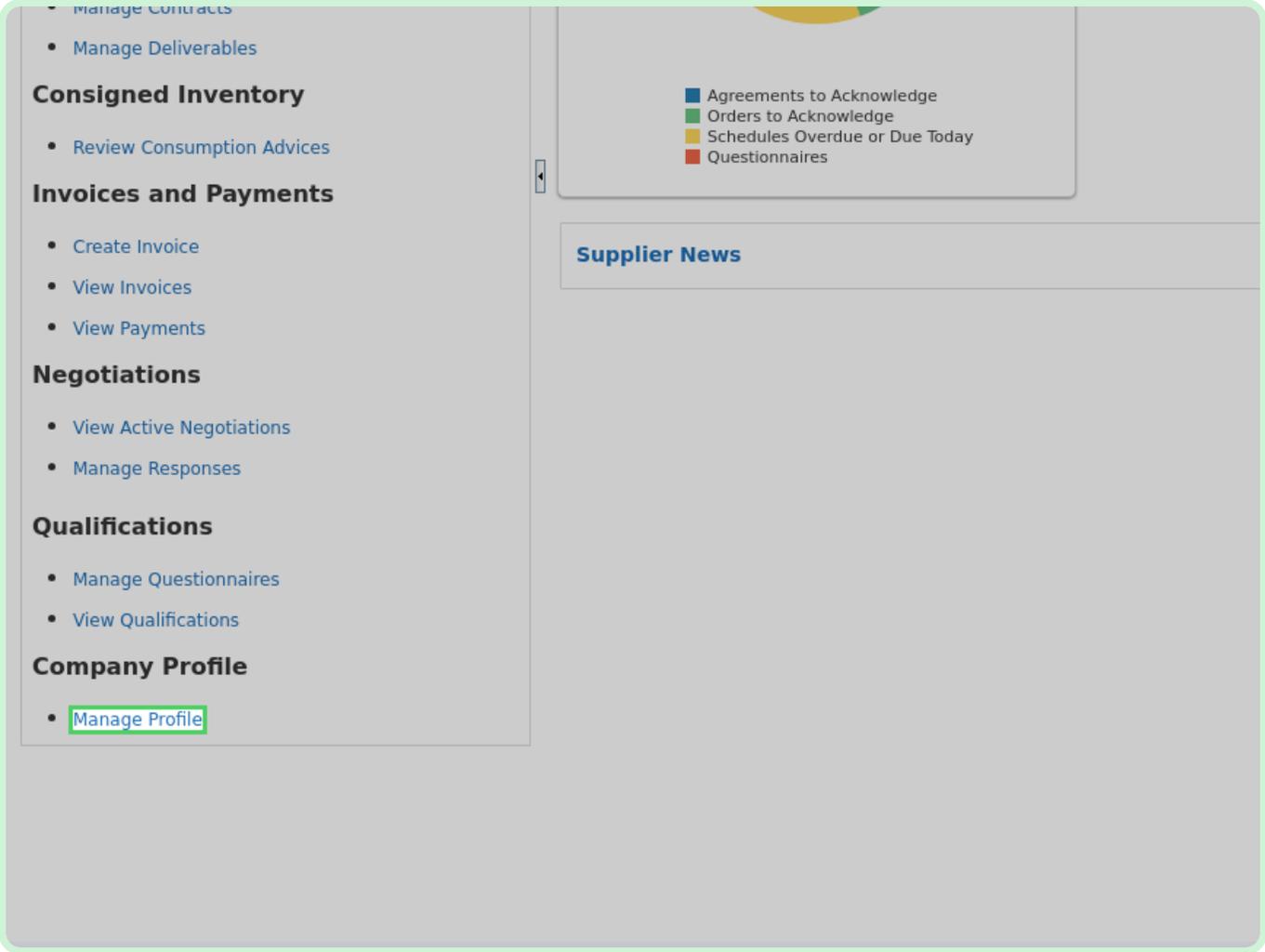
# Step 1

Select **Supplier Portal**.



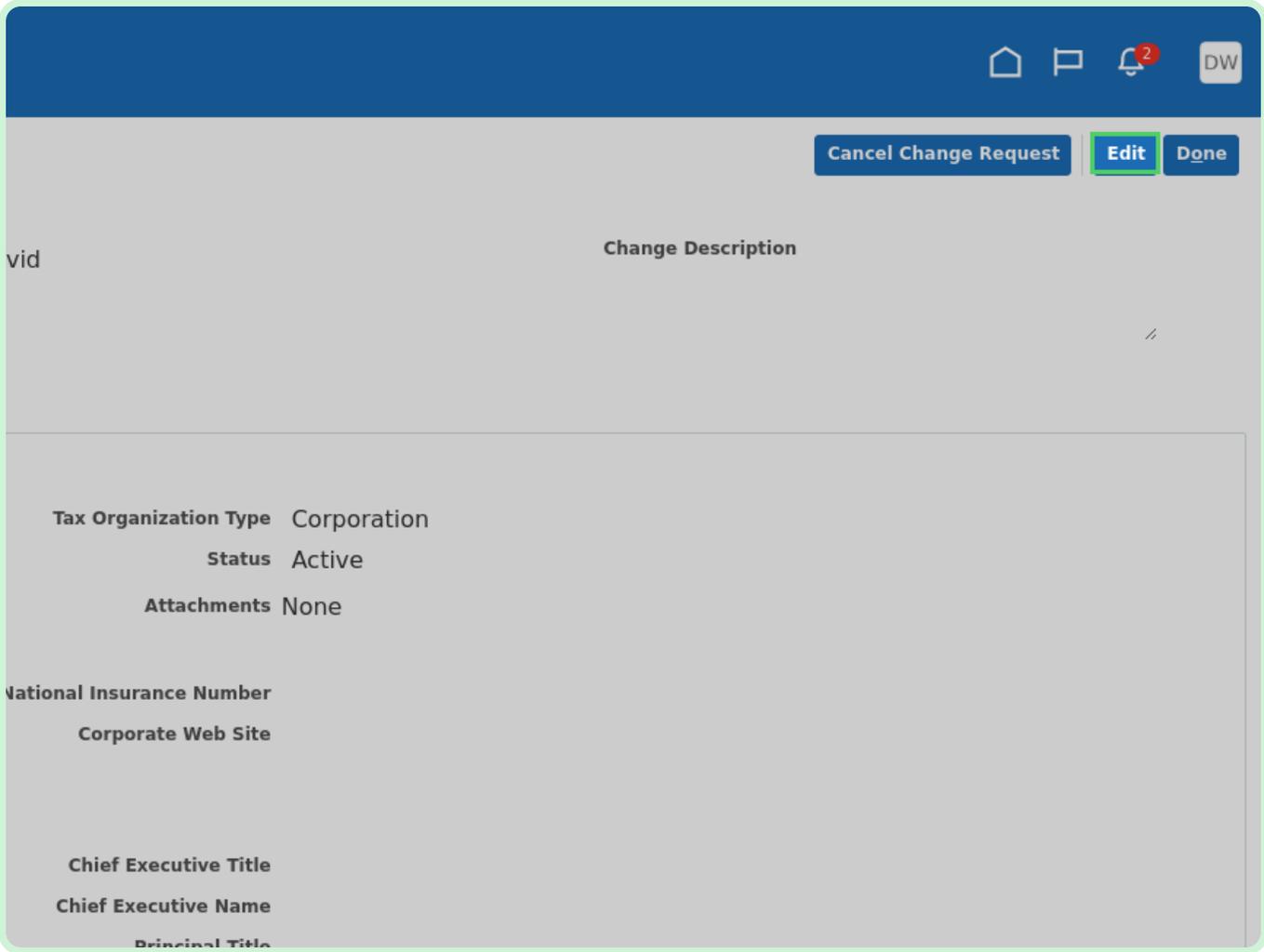
# Step 2

Select **Manage Profile**.



# Step 3

Select **Edit**.



# Step 4

In the **Change Description** field, type **Updating contact details**.

The screenshot shows a software interface with a dark blue header bar. Below the header, there is a breadcrumb trail with three dots. The main content area has a light gray background. A label 'Change Description' is positioned to the left of a white rectangular input field, which is highlighted with a green border. Below this field is a horizontal navigation bar with tabs: 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. Underneath the navigation bar, there are several input fields and labels. On the left side, labels include 'ne', 'er', 'oe', 'er', 'er', 'IC', and 'ed'. On the right side, labels include 'Tax Orga', 'National Insur', 'Corpo', and 'Chief E'. The input fields contain the following text: 'Gas Material Supplier', '201013', a dropdown arrow, and several empty text boxes.

# Step 5

Select **Contacts**.

The screenshot shows the Ameren system interface for editing a profile change request. At the top left is the Ameren logo. Below it, the page title is "Edit Profile Change Request: ...". On the right, there is a "Change Description" field containing the text "Updating contact details". Below this is a horizontal navigation menu with tabs: "Organization Details", "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services". The "Contacts" tab is highlighted with a green border. Underneath, there are three expandable sections: "Genera", "Identificatic", and "Corporate Profi". The "Genera" section contains fields for "\* Supplier Name" (Gas Material Supplier), "Supplier Number" (201013), and "Supplier Type" (a dropdown menu). The "Identificatic" section contains fields for "D-U-N-S Number", "Customer Number", and "SIC". The "Corporate Profi" section contains a field for "Year Established".

# Step 6

Select **Create**.

The screenshot shows the Ameren CRM interface. At the top is the Ameren logo. Below it is a header for 'Edit Profile Change Request: ...'. A 'Change Description' field contains the text 'Updating contact details'. A navigation bar includes tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Contacts' tab is active. Below the navigation bar is a toolbar with 'Actions', 'View', 'Form', a blue square with a white plus sign (the 'Create' button), a pencil icon, an 'X' icon, a 'Status' dropdown menu set to 'Active', a 'Freeze' icon, a 'Detach' icon, and a 'Wrap' icon. Below the toolbar is a table with the following data:

Name	Job
Smith, Chad	Offi
Welch, David	CSR

Below the table, it says 'Columns Hidden 7'.

# Step 7

In the **First Name** field, type **John**.

The screenshot shows a user profile form with several sections. The 'Name' section includes fields for Salutation, First Name (highlighted with a green border), Middle Name, Last Name, and Job Title. There is also a checkbox for 'Administrative contact'. To the right are fields for Phone, Mobile, Fax, Email, and a Status dropdown menu set to 'Active'. Below this is the 'Contact Address' section with a table header: Address Name, Address, Phone, and Ad. The table content is empty, showing 'No data to display.' and 'Columns Hidden 5'. Below that is the 'User Account' section with a 'Request user account' checkbox. At the bottom is the 'Roles' section with a table header: Role and Description. This table is also empty, showing 'No data to display.'

# Step 8

In the **Last Name** field, type **Barry**.

The screenshot shows a 'Create Contact' form with the following fields and options:

- Salutation: dropdown menu
- \* First Name: text input containing 'John'
- Middle Name: text input
- \* Last Name: text input, highlighted with a green border
- Job Title: text input
- Administrative contact: checkbox (unchecked)
- Phone: text input
- Mobile: text input
- Fax: text input
- Email: text input
- Status: dropdown menu set to 'Active'

Below the form are three sections:

- Contact Address:** Includes a toolbar with 'Actions', 'View', 'Form', 'Freeze', 'Detach', and 'Wrap'. Below is a table with columns 'Address Name', 'Address', 'Phone', and 'Ad'. The table is empty with the message 'No data to display. Columns Hidden 5'.
- User Account:** Includes a checkbox for 'Request user account'.
- Roles:** Includes a sub-section for 'Data Access' with a toolbar and a table with columns 'Role' and 'Description'. The table is empty with the message 'No data to display'.

# Step 9

In the **Job Title** field, type **Invoicing Manager - Purchasing**.

The screenshot shows a user profile form with the following fields and options:

- Salutation: dropdown menu
- \* First Name: text input containing "John"
- Middle Name: text input
- \* Last Name: text input containing "Barry"
- Job Title: text input, highlighted with a green border
- Administrative contact: checkbox
- Phone: text input
- Mobile: text input
- Fax: text input
- Email: text input
- Status: dropdown menu set to "Active"

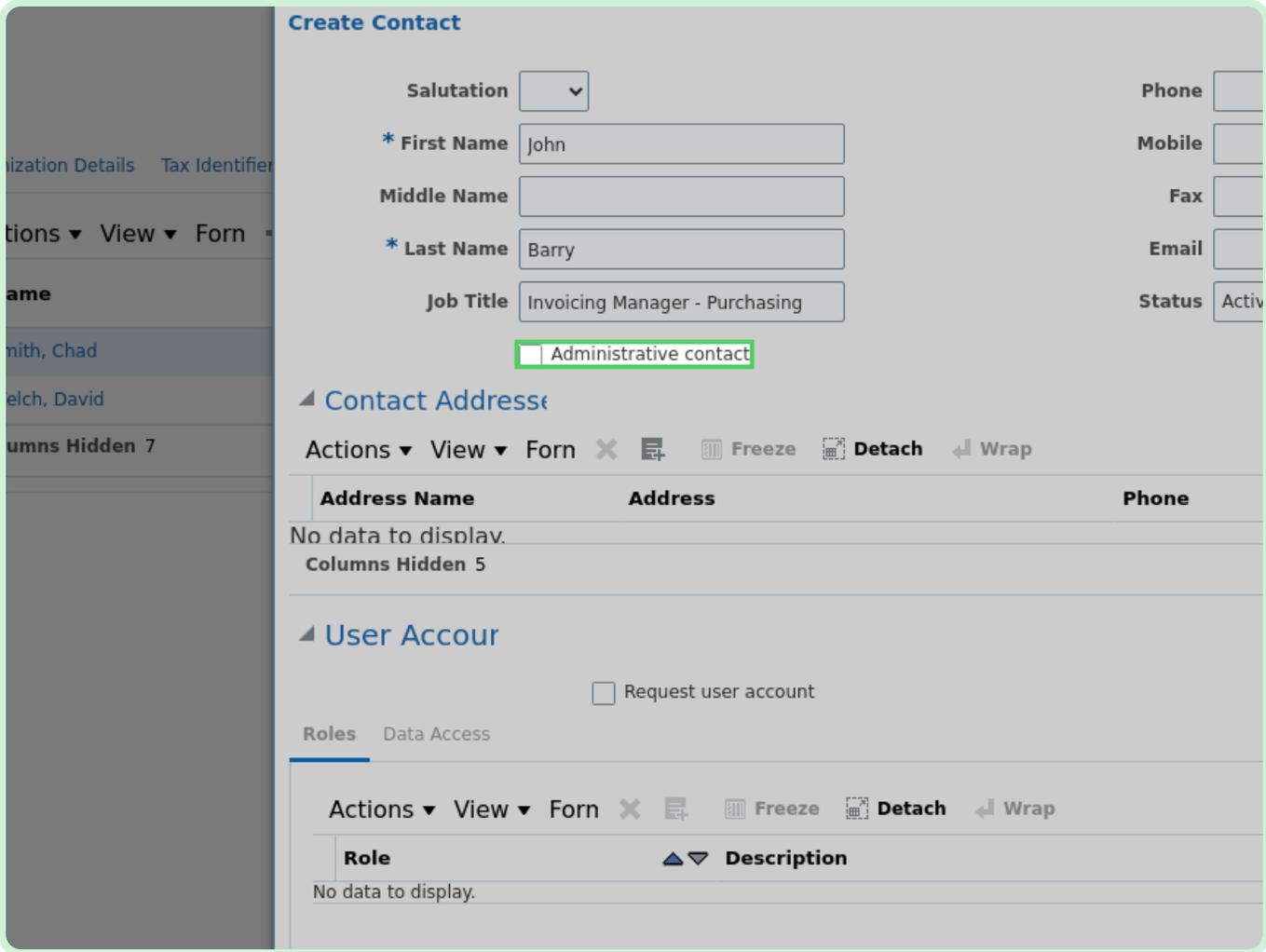
Below the form, there are two expandable sections:

- Contact Address**: Includes a table with columns "Address Name", "Address", "Phone", and "Ad". The table is currently empty, showing "No data to display." and "Columns Hidden 5".
- User Account**: Includes a checkbox for "Request user account".

At the bottom, there is a **Roles** section with a "Data Access" tab. It includes a table with columns "Role" and "Description", which is also empty, showing "No data to display.".

# Step 10

Select the **Administrative contact** checkbox.



# Step 11

In the **Phone** field, type **800 123 1234**.

The screenshot shows a software interface with a dark blue header containing navigation icons (home, flag, notification with '2', and a partial 'D' icon). Below the header is a toolbar with buttons: 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. A modal window is open, displaying a form with the following fields:

- Phone: A dropdown menu followed by three input boxes. The first box is highlighted with a green border.
- Mobile: A dropdown menu followed by two input boxes.
- Fax: A dropdown menu followed by two input boxes.
- Email: A single wide input box.
- Status: A dropdown menu currently set to 'Active'.

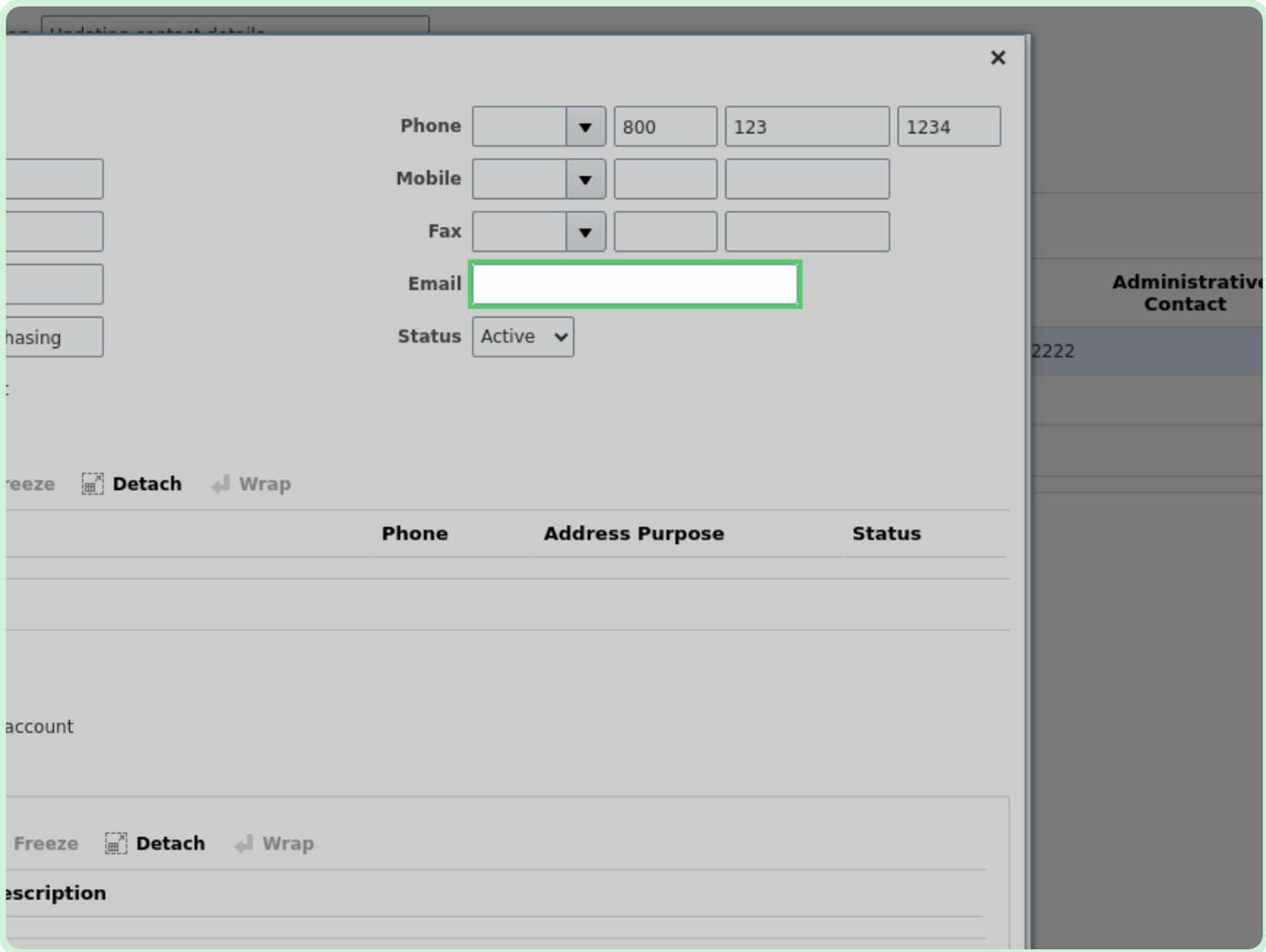
At the bottom left of the modal is a 'Wrap' button. Below the form is a table with the following structure:

Phone	Address Purpose	Status

To the right of the modal, a portion of another table is visible, showing columns for 'Administrative Contact', 'User Account', and 'Status'. Two rows are shown, each with a green checkmark in the 'User Account' column and the text 'Active' in the 'Status' column.

# Step 12

In the **Email** field, type **johnbarry@GMS.com**.



## Step 13

Select the **Request user account** checkbox.

### **Note**

Selecting the **Request user account** checkbox will auto-populate the **User Account** section with the relevant roles.

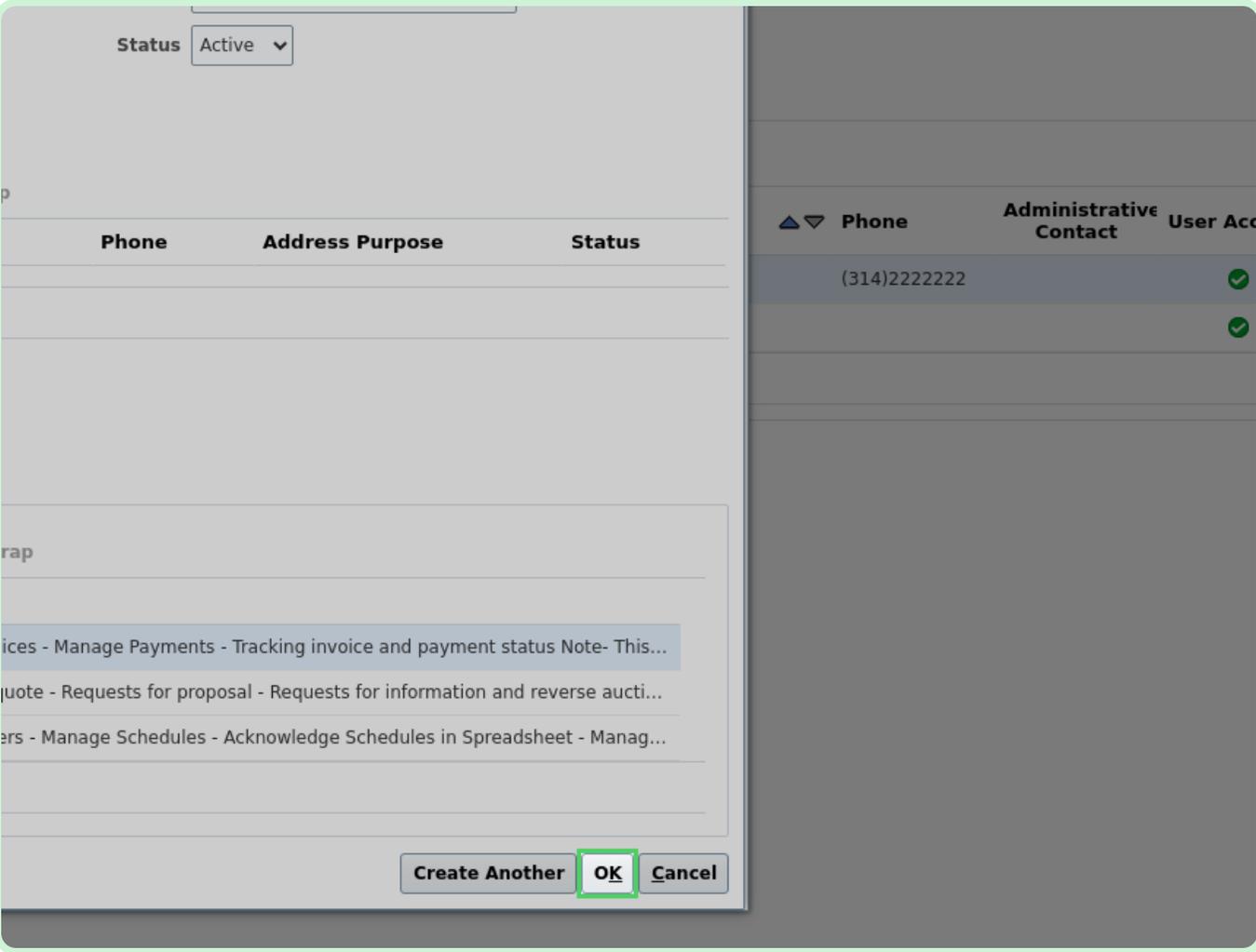
The screenshot shows the 'Create Contact' form in a CRM system. The form is divided into several sections:

- Personal Information:** Includes fields for Salutation, First Name (John), Middle Name, Last Name (Barry), Job Title (Invoicing Manager - Purchasing), and an unchecked checkbox for 'Administrative contact'. On the right, there are fields for Phone, Mobile, Fax, Email (johnbarry@C), and Status (Active).
- Contact Address:** A section with a table header: Address Name, Address, Phone, and Address. The table is currently empty, showing 'No data to display' and 'Columns Hidden 5'. Above the table are action buttons: Actions, View, Form, Freeze, Detach, and Wrap.
- User Account:** A section with a checkbox labeled 'Request user account' which is highlighted with a green box. Below this are tabs for 'Roles' and 'Data Access', and another table with headers 'Role' and 'Description', also showing 'No data to display'.

# Step 14

Select **OK**.

**Note**  
If necessary, you can select the **Create Another** button to add another new contact.



# Step 15

Select **Smith, Chad**.

Be sure to select the row and not the name link.

The screenshot shows a software interface for editing a profile change request. At the top, there is a header "Edit Profile Change Request: ..." and a "Change Description" field containing the text "Updating contact details". Below this, there are several tabs: "Organization Details", "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services". The "Contacts" tab is active, displaying a table with the following data:

Actions	View	Form	+	✎	✕	Status	Active	▼	🗑️	Freeze	📄	Detach	↩️	Wrap	Job
															Inv
															Offi
															CSR

The row for "Smith, Chad" is highlighted in yellow, indicating it is selected. Below the table, there is a section labeled "Columns Hidden 7".

# Step 16

Select **Edit**.

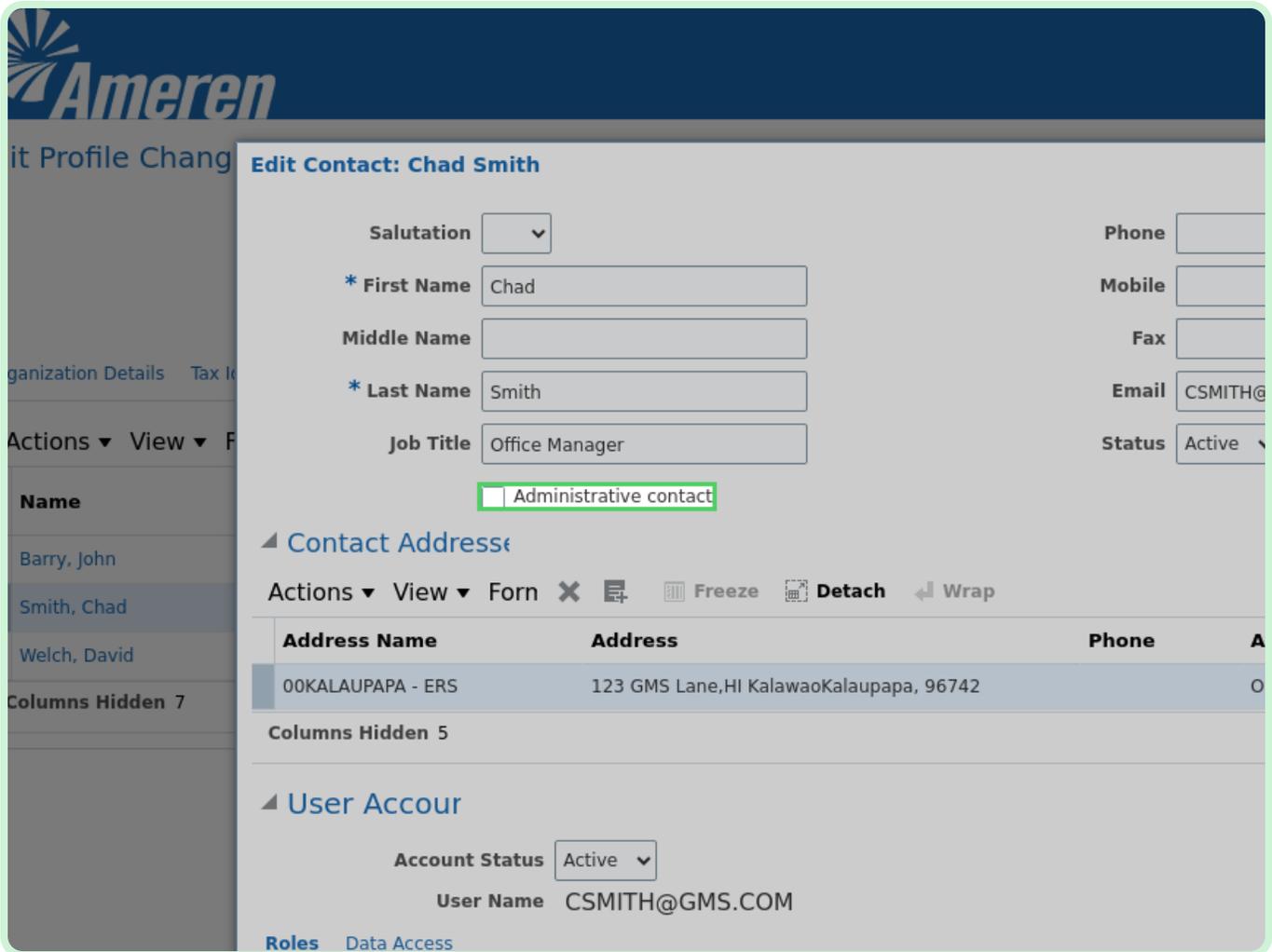
The screenshot shows the Ameren CRM interface for editing a profile change request. At the top, the Ameren logo is displayed. Below it, the page title is "Edit Profile Change Request: ...". A "Change Description" text area is visible. A navigation bar includes tabs for "Organization Details", "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services". The "Contacts" tab is selected. Below the navigation bar, there is a toolbar with "Actions", "View", "Form", a plus sign, a blue pencil icon (highlighted with a green box), a close icon, "Status" (set to "Active"), "Freeze", "Detach", and "Wrap". Below the toolbar is a table of contacts:

Name	Job
Barry, John	Inv
Smith, Chad	Offi
Welch, David	CSR

Below the table, it says "Columns Hidden 7".

## Step 17

Select the **Administrative contact** checkbox.



**Ameren**

it Profile Change **Edit Contact: Chad Smith**

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

▲ Contact Address

Actions View Form Freeze Detach Wrap

Address Name	Address	Phone	A
00KALAUPAPA - ERS	123 GMS Lane, HI KalawaoKalaupapa, 96742		O

Columns Hidden 5

▲ User Account

Account Status

User Name CSMITH@GMS.COM

Roles Data Access

# Step 18

Select **OK**.

The screenshot shows a software interface with a dialog box in the foreground. The dialog box has a title bar with the text 'rap'. It contains a table with the following data:

Phone	Address Purpose	Status
42	Ordering; Remit to	Active

Below the table, there is a section labeled 'Wrap' containing several lines of text, including 'invoices - Manage Payments - Tracking invoice and payment status Note- This...', 'r quote - Requests for proposal - Requests for information and reverse aucti...', and 'orders - Manage Schedules - Acknowledge Schedules in Spreadsheet - Manag...'. At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a green border.

In the background, a larger table is visible with the following columns: 'Phone', 'Administrative Contact', and 'User A'. The data rows are:

Phone	Administrative Contact	User A
(800)123 x123	✓	✓
(314)2222222		✓

# Step 19

Select **Review Changes**.

The screenshot shows a software interface with a dark blue header bar containing navigation icons (home, flag, notification with '2', and user 'DW'). Below the header is a row of action buttons: 'Delete Change Request', 'Review Changes' (highlighted with a green border), 'Save', 'Save and Close', and 'Cancel'. Below the buttons is a table with the following data:

	Phone	Administrative Contact	User Account	Status
@GMS.com	(800)123 1234	✓	✓	Active
GMS.COM	(314)2222222	✓	✓	Active
GMS.com			✓	Active

# Step 20

View **Changes**.

The new contact will be indicated by the green plus icon, while the edited contact will be indicated by the blue dot icon.

If something is incorrect, select the **Edit** button to return and make the change.

The screenshot shows the Ameren CRM interface. At the top is the Ameren logo. Below it is a header bar with the text 'Review Chan...'. The main content area has a 'Change Description' field with the text 'Updating contact details'. Below this is a section titled 'Contact:' with a dropdown menu set to 'View' and buttons for 'Formal', 'Freeze', 'Detach', and 'Wrap'. A table of contacts is displayed below, with columns for 'Name' and 'Job Title'. The table contains two rows: one for 'Barry, John' with a green plus icon and 'Invoicing Ma' as the job title, and one for 'Smith, Chad' with a blue dot icon and 'Office Mana' as the job title. At the bottom of the table, it says 'Columns Hidden 7'.

	Name	Job Title
+	Barry, John	Invoicing Ma
●	Smith, Chad	Office Mana

# Step 21

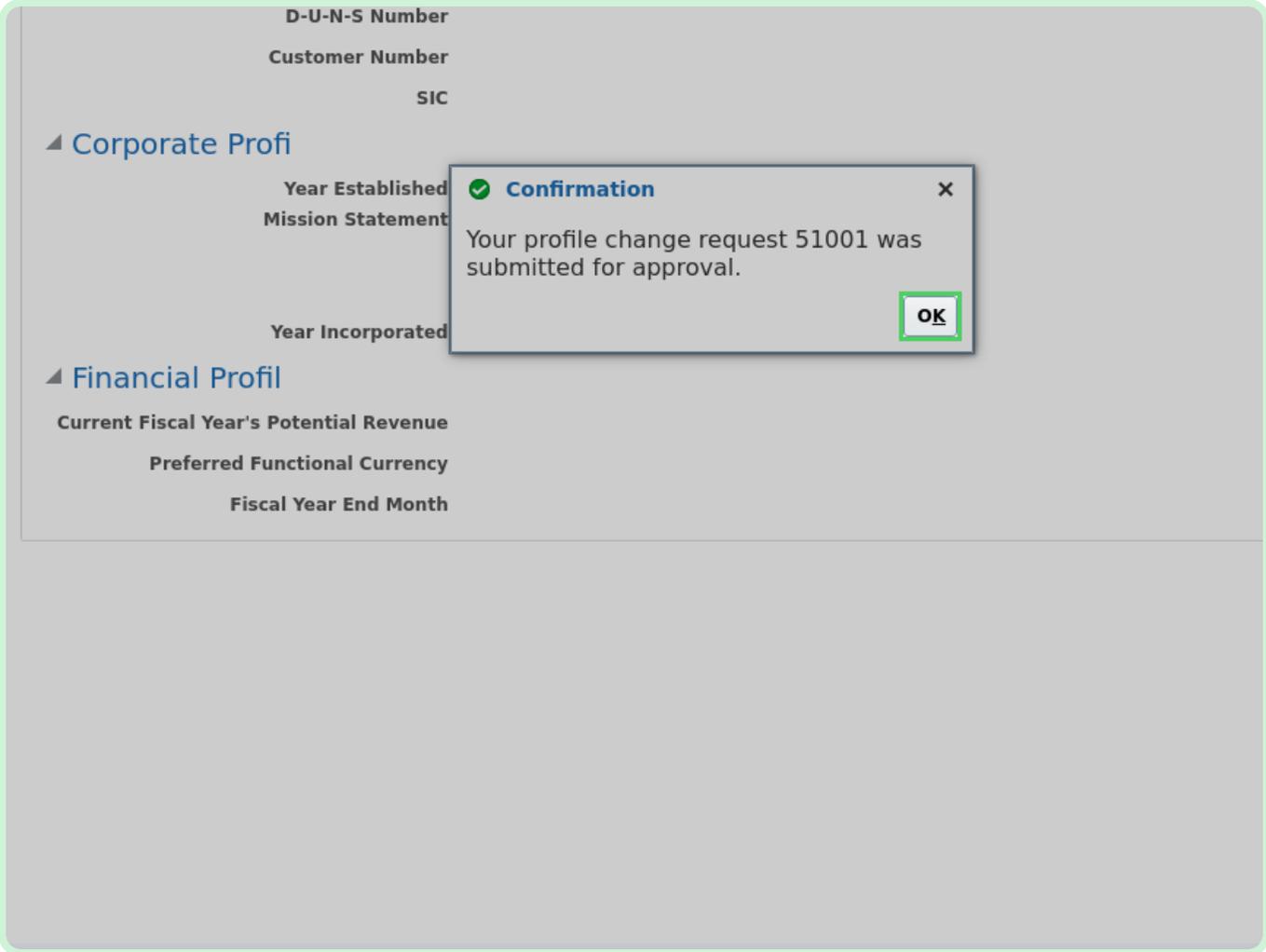
Select **Submit**.

The screenshot shows a web application interface with a dark blue header bar. On the right side of the header, there are icons for home, a flag, a notification bell with a red '2' badge, and a user profile icon labeled 'DW'. Below the header, there is a light gray area containing three buttons: 'Edit', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a green border. Below this area is a table with the following columns: Phone, Administrative Contact, User Account, Status, and Details. The table contains two rows of data, both with green checkmarks in the 'Administrative Contact' and 'User Account' columns and 'Active' in the 'Status' column. The 'Details' column contains a magnifying glass icon for each row.

	Phone	Administrative Contact	User Account	Status	Details
m	(800)123 1234	✓	✓	Active	🔍
4	(314)2222222	✓	✓	Active	🔍

# Step 22

Select **OK**.



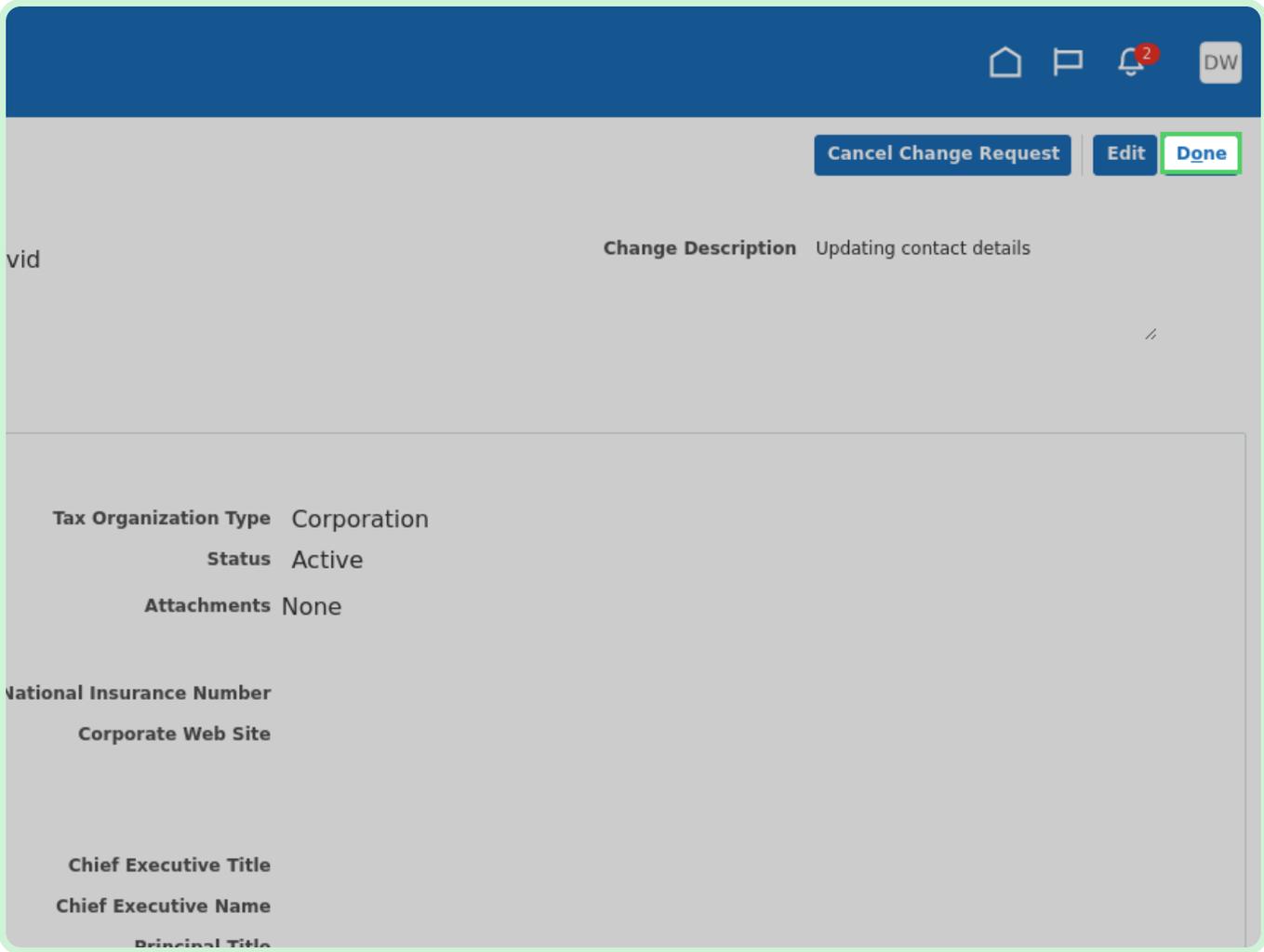
The screenshot shows a software interface with a confirmation dialog box overlaid. The background interface is dimmed and contains the following text:

- D-U-N-S Number
- Customer Number
- SIC
- Corporate Profi
- Year Established
- Mission Statement
- Year Incorporated
- Financial Profil
- Current Fiscal Year's Potential Revenue
- Preferred Functional Currency
- Fiscal Year End Month

The confirmation dialog box is titled "Confirmation" and contains the text: "Your profile change request 51001 was submitted for approval." There is a close button (X) in the top right corner and an "OK" button in the bottom right corner, which is highlighted with a green border.

# Step 23

Select **Done**.



# Step 24

Select **Home**.

