

# Manage Profile

August 2022

C1 - Public



# Manage Profile

1. In the “Supplier Portal” page, supplier users with role “Supplier Self Service Administrator” click “Manage Profile”.

**FWD** Supplier Portal

Search  Order Number

**Tasks**

- Orders
  - Manage Orders
  - Manage Schedules
  - Acknowledge Schedules in Spreadsheet
- Agreements
  - Manage Agreements
- Contracts and Deliverables
  - Manage Contracts
  - Manage Deliverables
- Consigned Inventory
  - Review Consumption Advices
- Invoices and Payments
  - Create Invoice
  - Create Invoice Without PO
  - View Invoices
  - View Payments
- Negotiations
  - View Active Negotiations
  - Manage Responses
- Qualifications
  - Manage Questionnaires
  - View Qualifications
- Company Profile
  - Manage Profile**

**Requiring Attention**  
No data available

**Recent Activity**  
Last 30 Days  
No data available

**Transaction Reports**  
Last 30 Days  
No data available

**Supplier News**

# Manage Profile

2. "Company Profile" page will display. Then, click "Edit". Warning message will show up, click "Yes"

The screenshot shows the FWD 'Company Profile' page. At the top left is the FWD logo. Below it is the title 'Company Profile' with a help icon. On the top right, there are navigation icons: a home icon, a flag icon, a notification bell with a '4' badge, and a user profile icon labeled 'FS'. Below these icons is a red circle with the number '1' and two buttons: 'Edit' (highlighted with a red box) and 'Done'. A horizontal menu below the title contains several tabs: 'Organization Details' (selected), 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The main content area is divided into four sections: 'General', 'Identification', 'Corporate Profile', and 'Financial Profile'. The 'General' section includes fields for 'Company' (FWD Supplier 1 Company Limited), 'Supplier Number' (10307), 'Supplier Type', 'Tax Organization Type' (Corporation), 'Status' (Active), and 'Attachments' (None). The 'Identification' section includes 'D-U-N-S Number', 'Customer Number', and 'SIC'. The 'Corporate Profile' section includes 'Year Established', 'Mission Statement', 'Chief Executive Title', 'Chief Executive Name', 'Principal Title', and 'Principal Name'. The 'Financial Profile' section is partially visible. A warning dialog box is open in the bottom right corner, titled 'Warning' with a yellow triangle icon and a close button 'X'. The message reads: 'POZ-2130390 Making edits will create a change request for the profile. Do you want to continue?'. Below the message are two buttons: 'Yes' (highlighted with a red box) and 'No'. A red circle with the number '2' is positioned to the left of the 'Yes' button.

# Manage Profile

3. Under “Organization Details”, edit details of your company and add attachments to support your changes if necessary.

The screenshot displays the FWD Manage Profile interface. At the top left is the FWD logo. To its right are navigation icons: a home icon, a flag icon, a notification bell with a red '4' badge, and a user profile icon labeled 'FS' with a dropdown arrow. Below the logo, the text 'Edit Profile Change Request: 33001' is displayed. To the right of this text are four buttons: 'Delete Change Request', 'Review Changes', 'Save', and 'Save and Close', followed by a 'Cancel' button. Below these buttons is a 'Change Description' text input field. The main content area is a tabbed interface with the following tabs: 'Organization Details' (selected), 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Organization Details' tab is expanded to show three sections: 'General', 'Identification', and 'Corporate Profile'. The 'General' section includes: '\* Supplier Name' (text input: 'FWD Supplier 1 Company Limited'), 'Supplier Number' (text input: '10307'), 'Supplier Type' (dropdown menu), 'Tax Organization Type' (dropdown menu: 'Corporation'), and 'Status' (text: 'Active'). The 'Attachments' section shows 'None' with a plus sign icon. The 'Identification' section includes: 'D-U-N-S Number', 'Customer Number', and 'SIC' (all text input fields), and 'National Insurance Number' (text input field). The 'Corporate Profile' section includes: 'Year Established' (text input field), 'Mission Statement' (text input field), 'Chief Executive Title' (text input field), and 'Chief Executive Name' (text input field). The 'Attachments' section is highlighted with a red border.

# Manage Profile



**Tips :** You can add attachments by select + button, “Choose file” that you would like to attach, enter “Description” (if any), Then, click “OK”.

Tax Organization Type Corporation

Status Active

Attachments None **+** **1**

**Attachments**

Actions View + X

Type	* File Name or URL	Title	Description	Attached By	Attached Date
File <b>2</b>	<b>Choose File</b> no file chosen			FWD Supplier 1	9/19/21 3:42 F

Rows Selected 1 Columns Hidden 1

OK Cancel

**Attachments**

Actions View + X

Type	* File Name or URL	Title <b>3</b>	Description	Attached By	Attached Date
File	bookbank.docx <b>Update...</b>	bookbank.docx	<b>copy of passbook</b>	anonymous	09/14/2021 10:09

Rows Selected 1 Columns Hidden 1

**4** **OK**

**“Title” will be automatically generated based on file name.**




Changes that need suppliers to submit supporting documents as an evidence. If you haven't attached, FWD will request you to add the attachments and resubmit the request again.

No.	Cases	Supporting documents
1	Change the company's address	Company Affidavit / business registration certificate
2	Change the bank information	<b>For saving accounts :</b> - Copy of passbook <b>For current accounts :</b> - Copy of bank statement or letter of certificate from bank

# Manage Profile

4. Under “Tax Identifiers”, edit tax information if necessary.

Home | Flag | Notifications (4) | FS

Edit Profile Change Request: 33001

Delete Change Request | Review Changes | Save | Save and Close | Cancel

Change Description

Organization Details | **Tax Identifiers** | Addresses | Contacts | Payments | Business Classifications | Products and Services

### Income Tax

Taxpayer Country:

Taxpayer ID:

Federal reportable

Federal Income Tax Type:

State reportable

Tax Reporting Name:

Name Control:

Verification Date:

Use withholding tax

Withholding Tax Group:

Tax Registration Type:

### Transaction Tax

Tax Country:

Tax Registration Number:

7

# Manage Profile

5. Under “Addresses”, edit address information if necessary.

**FWD**  
Edit Profile Change Request: 33001

Change Description

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
E075_TH	1 ABC Tower, Yannawa Sathorn 11122, THAILAND	+66 (81)2345678	Ordering; Remit to; RFQ or Bidding		Active

Columns Hidden 3

**Edit Address: E075\_TH**

\* Address Name: E075\_TH  
\* Country: Thailand  
\* Address Line 1: 1 ABC Tower  
Address Line 2:  
Address Line 3:  
City: Yannawa  
State: Sathorn  
Postal Code: 11122  
Language:

\* Address  Ordering  
Purpose  Remit to  
 RFQ or Bidding  
Phone: 66 81 2345678  
Fax:  
Email:  
Inactive Date: m/d/yy  
Status: Active

When complete, click "OK".

OK Cancel

# Manage Profile

6. Under “Contacts”, edit contact information if necessary.

Click here to edit.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Supplier 1, FWD		fwdsupplier1@gmail.com		✓	✓	Active

You can inactive user by changing the status here.

When complete, click “OK”.

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking i...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, req...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting cha...

# Manage Profile

7. Under “Contacts”, you can add another contact by click + this button.

The screenshot displays the 'Manage Profile' interface for 'Edit Profile Change Request: 33001'. At the top, there is a 'Change Description' text area. Below it, a navigation menu includes 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts' (highlighted), 'Payments', 'Business Classifications', and 'Products and Services'. A toolbar contains buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. Below the navigation, a table of contacts is shown with columns for Name, Job Title, Email, Phone, Administrative Contact, User Account, and Status. The table has a toolbar with 'Actions', 'View', 'Format', a red-bordered plus sign button, a pencil icon, a close icon, 'Status' (set to 'Active'), 'Freeze', 'Detach', and 'Wrap'. The table contains one row: 'Supplier 1, FWD' with email 'fwdsupplier1@gmail.com', 'Administrative Contact' checked, 'User Account' checked, and 'Status' 'Active'. Below the table, it says 'Columns Hidden 7'.



**Tips :** Suppliers can assign more than 1 person in 1 role. i.e.

- 1st user has role Supplier Bidder and Supplier Sales Representative.
- 2nd user has role Supplier Self Service Administrator, Supplier Bidder and Supplier Sales Representative.
- 3rd user has role Supplier Self Service Administrator and FWD Supplier Account Receivables Specialist.

# Manage Profile

8. In “**Create Contacts**” page, fill in First Name, Last Name, Email and other information. Then, click “OK”.

**Create Contact**

1

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Phone

Mobile

Fax

\* Email

Administrative contact

Flag for Primary contact

User Account

2  Request user account

Tick this checkbox to crate a user account for this new user. System will automatically assign 4 roles to the users.

Roles

Role	Description
Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and r...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting chan...
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...

3

\*\* Don't use **Duplicate email** for multiple users because email will be used as username to log in to Supplier Portal. \*\*



No.	Role	Responsibilities
1	Supplier Self Service Administrator	Update profile information for the supplier company
2	Supplier Bidder	Respond to requests for quote, requests for proposal and requests for information
3	Supplier Sales Representative	Respond to questionnaires sent by buying organization
4	FWD Supplier Account Receivables Specialist	Manage PO matched invoices and payments of the supplier
5	Supplier Account Receivables Specialist	Manage invoices and payments of the supplier <span style="color: orange;">(will be granted by local supplier manager to supplier users case by case)</span>

# Manage Profile



**Tips :** Since system will automatically assign 4 roles to the users, if you would like to specific some roles that should be assigned to users, you can do by select the **unassigned role**, click “Action” and “Remove”.

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

\* Email

▾ User Account

Request user account

Roles

2 Actions View Format X Print Freeze Detach Wrap

3 Remove

	Description
Select and Add	ivable Specialist
Supplier Bidder	Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requ...
1 Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting chan...

OK Cancel

# Manage Profile

9. Under “Payments”, click “Bank Accounts”. you can edit bank account if necessary.

Change Description

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	1112223334			KASIKORNBANK PUBLIC CO...

Columns Hidden 8

Click here to edit.



Invoice submitted **before** approving change of bank account, information will apply with **previous information**.

**Edit Bank Account 1112223334**

Enter account number or IBAN unless account number is marked as required.

\* Country Thailand

\* Account Number 1112223334

Bank Name KASIKORNBANK PUBLIC COMPANY

Bank Branch KASITHBK765

Allow international payments

Additional Information

Account Name FWD Supplier 1 Co., Ltd.

Alternate Account Name

Account Suffix

From Date 9/14/21

Inactive On m/d/yy

IBAN

Currency

Check Digits

Account Type

Description

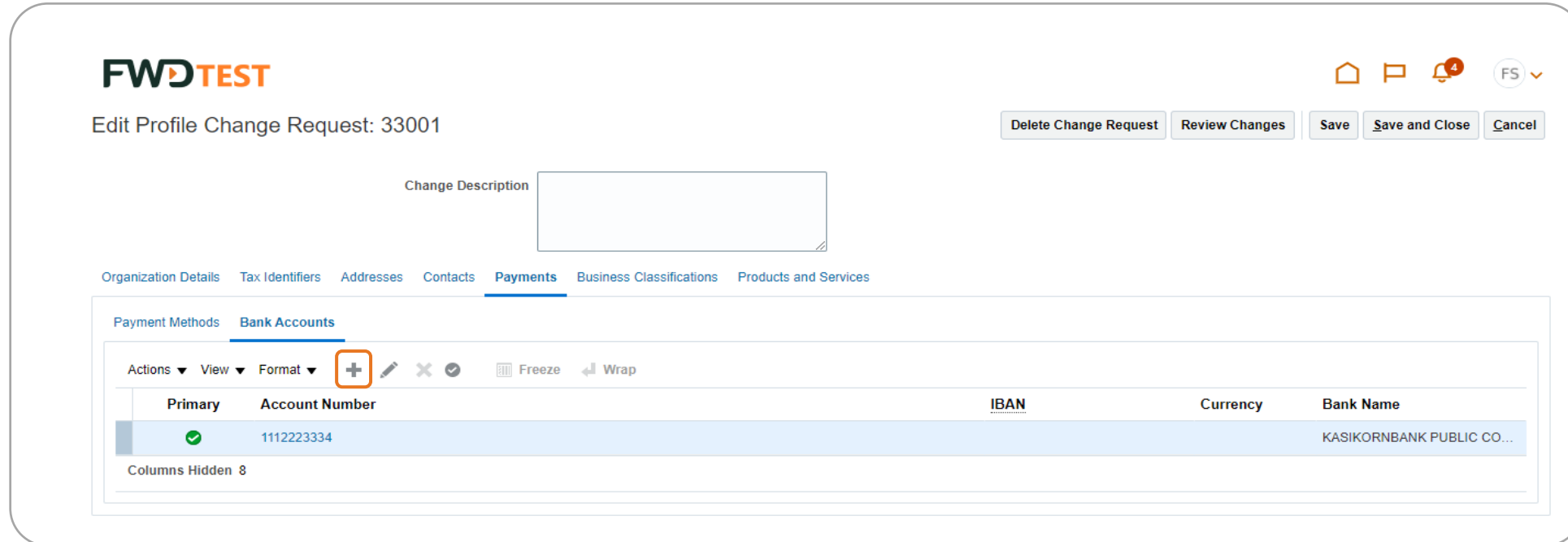
OK Cancel

You can inactive bank account by insert Inactive date here.

When complete, click “OK”.

# Manage Profile

10. Under “Bank Accounts”, you can add another contact by click + this button.



**FWDTEST**

Edit Profile Change Request: 33001

Change Description

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods **Bank Accounts**

Actions View Format **+** Freeze Wrap

Primary	Account Number	IBAN	Currency	Bank Name
✓	1112223334			KASIKORNBANK PUBLIC CO...

Columns Hidden 8

Delete Change Request Review Changes Save Save and Close Cancel

# Manage Profile

11. In “**Create Bank Account**” page, fill in Bank information. Then, click “OK”.

**Create Bank Account**

1 Enter account number or IBAN unless account number is marked as required.

\* Country Thailand  IBAN

\* Bank KASIKORNBANK PUBLIC COMPANY LIMITED

\* Branch KASITHBK765

\* Account Number 1112223334

**Field “Account number”**

- For bank in Europe, fill in IBAN.

**Additional Information**

Account Name FWD Supplier 1 Co., Ltd. Agency Location Code

Alternate Account Name  Account Type

Account Suffix  Description

Check Digits

**Comments**

Note to Approver

2

Create Another **OK** Cancel

**Tips :** If you have more than 1 bank account, you can click “**Create Another**” to add another bank account. During the invoice submission via supplier portal, you can select which account that you would like to remit to.

# Manage Profile

12 .When you complete edit the necessary data, enter “Change Description”. Then, click “Review Changes”.

**1** Change Description

- Revise bank information
- Remittance advice's email : finanace@gmail.com

**2**

Delete Change Request Review Changes Save Save and Close Cancel

Any changes for items below, please type here:

- PO's email : xxx (Please specify only 1 email)
- Remittance advice's email : xxx (Please specify only 1 email)
- Can receive e-wht : xxx (Yes/No)

Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods **Bank Accounts**

Actions View Format + ✎ ✕ ✓ Freeze Wrap

Primary	Account Number	IBAN	Currency	Bank Name
✓	1112223334			KASIKORNBANK PUBLIC CO...

Columns Hidden 8

# Manage Profile

13. “Review changes” page will display. Review your changes and click “Submit”. Then you’ll receive the confirmation message, click “OK”. Your change request will be approved by 3-5 working days.

All changes that are made need to be reviewed and approved by FWD Life Insurance PCL.

14. You'll receive an email notification once Change Request has been approved.

From: <[eibg-test\\_fa\\_sender@workflow.mail.us6.oraclecloud.com](mailto:eibg-test_fa_sender@workflow.mail.us6.oraclecloud.com)>  
Date: 01.10.2021 13:56  
Subject: FYI: Supplier Profile Change Request 37001 was Approved by FWD  
To: <[fwdsupplier1@gmail.com](mailto:fwdsupplier1@gmail.com)>

## Supplier Profile Change Request 37001 was Approved by FWD

### Details

Assignee	FWD Supplier 1.	Request	37001	Supplier	FWD Supplier 1 Company Limited
From	Rt	Request Date	10/10/2021	Supplier Number	10307
Assigned Date	10/10/2021 23:56	Requested By	Supplier 1, FWD		
Expiration Date	9/11/2021 23:56	Change Description	Change Bank Account Name		
Task Number	486450				

### Action Details

Action	Approved
Action Date	10/10/2021 23:56



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**Thank you**