# **Supplier Online Profile Update Instructions**

Use these instructions to update your company’s profile in Fermilab’s Supplier Portal. This includes how to add another contact person, how to update your company’s addresses, and how to add products and services etc. *Choosing “Save for Later” will send you an email with a link to continue making changes at a later time if you do not finish, however tax id’s will not save and will have to be re-entered.*

Log in to the Supplier Portal by typing your account name and password that you set up previously from the email sent. Your Supplier Portal homepage will be displayed. In the **Tasks** box on the bottom left, click the **Manage Profile** link.

The **Company Profile** page will be displayed. Your company profile is divided into seven sections. *Please note that some changes, such as address changes, will trigger approval requests to Fermilab Supplier Administrators. These changes will only take effect after Supplier Administrators approve them.*

Section 1: Organization Details

* You will land on the **Organization Details** tab. In this section, your company name, **Supplier Type**, **D-U-N-S Number**, and **Tax Organization** are mandatory fields. Please review them to make sure they are correct. The company name must be the full legal name of your company.
* If you need to make any changes, click the **Edit** button at the top right. When you are done editing, click the **Save** button*. Note that some fields, such as* ***Supplier Number, Primary NAICS*** *and* ***Status****, are informational fields.* ***Supplier Number*** *is automatically generated by the system. The* ***Primary NAICS*** *field is maintained by Fermilab. It is populated with the Primary North American Industry Classification System code.* Please don’t make any changes in this field. ***Active*** *indicates that your company is marked as an active supplier in Fermilab’s supplier database.*
* *If your company is a Small Business*, you are required to provide your annual revenue and the number of employees. In the **Additional Information** section, enter your **Annual Revenue.** In the **Corporate Total Employees** field, enter the number of employees.
* Click the **Tax Identifiers** tab to review your tax information. First, you need to fill out the **Tax Country** field. For example, for “United States” start by typing “United” and this will bring up a list of countries you can choose from. Select “United States” and hit **OK**. Then make sure your **Taxpayer ID** is correct.

Section 2: Addresses

* Click on the **Addresses** tab. In this section, you will be able to review and update your company’s addresses.
* If your company has multiple addresses listed here, you can update an address by selecting it and clicking the **Edit** button. When you are done editing, click the **OK** button. If you would like to inactivate an address, enter today’s date in the Inactive Date field.
* If you want to add another address, click the **+** button. Please note that the **Address Name** field can only accept 12 characters; therefore, we suggest you name your address by using the first three letters of the city plus dash plus state code plus dash plus a number. For example, you can use “LOS-CA-1” to represent your first location in Los Angeles, California.
* In the **Address Purpose** section on the right, there are three checkboxes. The first one is **ordering**. Check this box if you want Fermilab to use this address to create purchase orders. The second one is **remit to**. Check this box if you want Fermilab to send any payments to this address. The third one is **RFQ or bidding.** Check this box if you want to set this address as the primary address for Fermilab’s solicitations.
* Next enter the name of your country in the **Country** box, choose your country and type your address.
* Enter the name of your city and hit the tab key. This would bring up a list of city names. Choose the city with the correct county and state and then click **OK**. Similarly, you can enter the postal code and choose it from the dropdown menu. In addition, enter the 4-digit **Postal Code Extension** if it is applicable to your US zip code.
* Now enter your **County** name if it did not pre-populate.
* In the **Additional Information** section, enter your **Congressional District**. If you are not sure about your congressional district, check it out at <https://www.govtrack.us/congress/members>. Next, enter the **DUNS** number associated with this address. Click **Next** to go to the next section.
* When you are done, hit **OK**.

Section 3: Contacts

* Click the **Contacts** tab. Here, your company’s contacts will be listed. Use the pencil icon to change any existing contact data. If you would like to inactivate a contact, change the status field to “Inactive”.
	+ If you need to add another contact, click the **+** button. First name, last name and email are required fields. If you want this person to be able to perform administrative tasks in the Supplier Portal, such as adding other contacts, check the **Administrative contact** box**.** If this person needs his or her own user account, check the **Request user account** box. Click **OK**.

Section 4: Payments

Please skip the **Payments** tab at this time. We will roll out ACH payments to suppliers in batches at a later time. You will receive specific instructions on how to update your bank information when that happens.

Section 5: Business Classifications

* Click the **Business Classification** tab. In this section, you can add your company’s business classifications and upload your certification documents*.*
* If your business doesn’t have a special classification, such as minority owned, veteran owned etc., click the box **None of the classifications are applicable**.
* If your business has a special classification, click the **+** button and select a classification from the dropdown list.
* Under certifying agency, select either **Self-Certified or Other.** If Other,enter the other certifying agency name.
* Optionally, under **Certificate**, enter the certificate number. Then enter its start date and expiration date. If you want to attach a copy of your certificate, click the **+** sign to add an attachment.
* Some of you may notice that a **MOSRC Eligible Flag** is already added for your company. Please don’t change it. *This classification is added by Fermilab Supplier Administrator based on applicability. Fermilab as a Department of Energy national laboratory is required to report all procurement transactions and corresponding subcontractor information to the M&O Subcontract Reporting Capability database. If you add a classification called “****MOSRC Share Externally Flag****”, your annual revenue and number of employees will be available to the public. If your entity is registered in SAM.GOV, you should add the classification “****SAM Registered****” and enter the registration expiration date.*

Section 6: Products and Services

* Click the **Products and Services** tab. *In this section, you can select the NAICS codes that best classify the goods and services your company provides. By selecting the appropriate codes, your company will have a better chance of getting invited to a solicitation that matches your company’s business offerings*.
* On the left-hand side of the page, click the Actions down arrow. Then click the **Select and Add.** Or choose the “Select and Add” icon.
* Now click the small arrow icon next to the words “Products and Services” to expand the list. Once you’ve selected your products and services, scroll down and click **Apply** and then click **OK**. Click the **Save** button to save your changes.
* You may go to census.gov, FIND A CODE, to help identify your appropriate NAICS codes.

Section 7: Review

After you are done editing your company’s information, you may review your changes by clicking on Review at the top right. You may do more editing or submit. You will receive a confirmation message. To log out from the Supplier Portal, click Done, then click your name in the top-right corner and click the **Sign Out** link.