

Managing Supplier Profiles & Authorizations

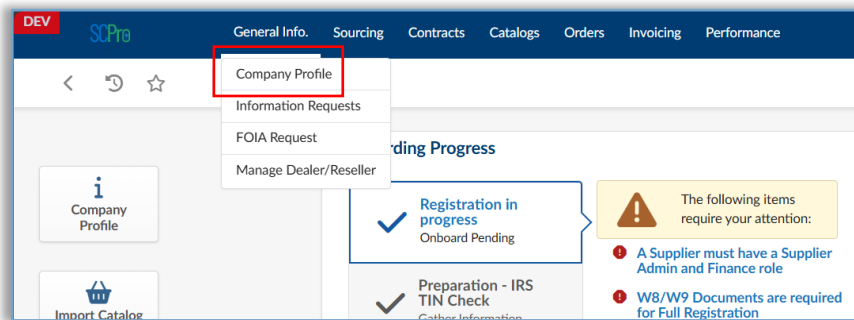


Your screen in SCPro may differ slightly from this training, but the steps to complete the activity will be the same.

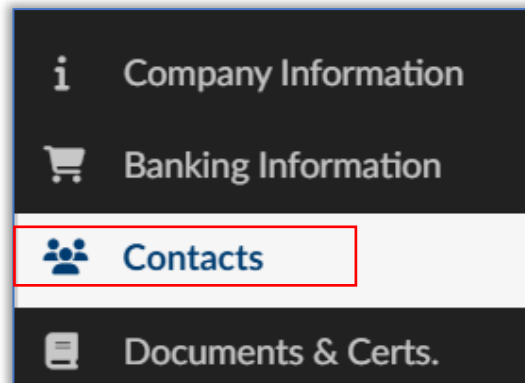


This icon indicates there are further **policy or business process details** relating to a step.

1. Navigate to the SCPro Supplier Portal at: **scpro.sc.gov**.
2. Login with the email and password you created when completing your initial registration.
3. Navigate to the **General Info** module in the Main Menu Navigation Bar and select **Company Profile** from the drop-down menu.



4. Navigate to the **Contacts** tab.

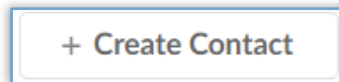


5. Review the user(s) that have been added to your organization and their assigned **Roles**. The process for adding additional users, as well as the different **Roles** are explained in more detail on the following pages.

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6. To invite additional users at your organization:

a) Click **+ Create Contact**.



b) Enter in the user's personal information. At a minimum, you must provide a **First Name**, **Last Name**, and an **Email** for the user.

The form is titled "Identity". It contains the following fields:

- ID: A text input field.
- Title: A dropdown menu.
- First Name*: A text input field.
- Last Name*: A text input field.
- Email*: A text input field.
- Position ⓘ: A text input field.
- Internal Identifier: A text input field.
- List of languages: A dropdown menu with "English" selected.

c) Click **Save & Close**.



d) Click the **Mail** (✉) icon next to the name of the user you just added. Then click **Send notification** in the pop-up that appears. The user will receive an email with a link to set up their password and login information.



e) Select a **Role** for the new user from the drop-down menu. Refer to the table on the next page for a list of roles and their capabilities.

A dropdown menu with the title "Role". The menu is currently closed, showing only the title and a small downward arrow icon.

Note that, at a minimum, every supplier in SCPro is required to have both a user with the **Supplier Admin** role, and a user with the **Supplier Finance** role. This can be the same user if appropriate.

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Role	Responsibilities
Supplier Admin	- The primary contact for the organization and is responsible for managing the company's account in SCPro - Full access to their supplier data in SCPro - Only one user can have the Supplier Admin role
Supplier Finance	- Manages supplier banking information - Only one user can have the Supplier Finance role
Backup Supplier Admin	A backup user in case the Supplier Admin is unavailable and has all the same capabilities and responsibilities
Catalog Contact	Able to upload hosted catalogs
Contract Contact	Will receive notifications about contract records in SCPro from the State
Legal Contact	Will receive legal notifications from the State
PO Contact	Will receive notifications about purchase orders from the State
Sourcing Contact	Will receive solicitation notifications from the State
Supplier View	Can view their supplier data in SCPro but cannot take any direct action

7. If your organization has multiple sites, you can copy contacts over between them. To copy a user, click **Select Existing Contact**. For more information on managing your organization's sites, please refer to the *Creating and Managing Supplier Sites QRG*.

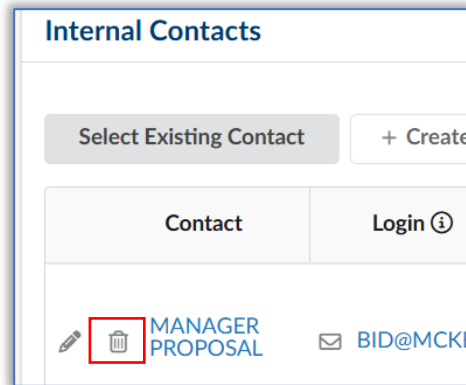
Select Existing Contact

8. Click the **Checkbox** (☐) icon next to the user's name that you would like to copy. Then click **Close**.
9. Update the **Role** for any copied or newly created users as appropriate. When you have finished making updates, click **Save**.

Save

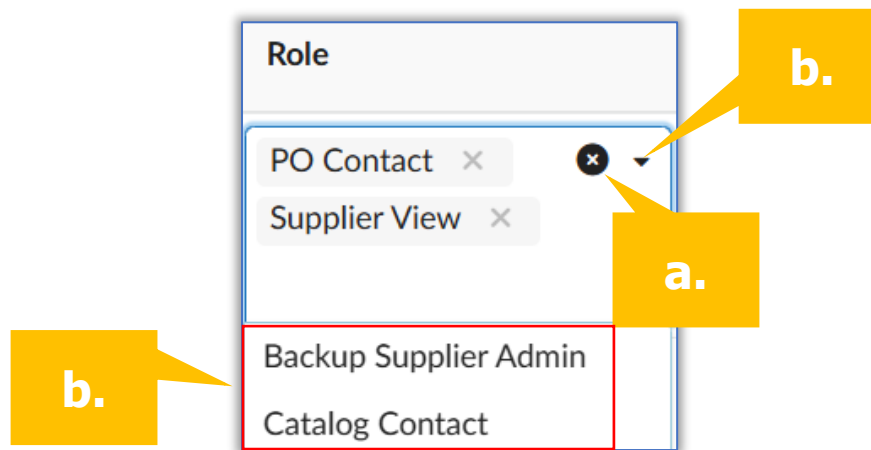
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- 10.** To remove users who were previously added to your internal contacts list:
- On the **Contacts** tab, Click the **Trashcan**  icon to the left of the contact you wish to remove.



- A pop-up will appear confirming whether you want to delete the contact. Click **OK**.

- 11.** If you would like to edit the role of a once they have been added:



- To remove a current role for a contact, click the **X** to the right of the role.
- To edit and add an additional role, click the drop-down arrow and select a new role to add to the contact.

- 12.** After all changes have been made to the internal contacts, click **Save**.



Congratulations! You have successfully managed the supplier profiles and authorizations for your organization in SCPro.