Step-by-Step Instructions for Managing Contacts as a Supplier

Log in to Ohio eProcurement. From the Main Menu Navigation Bar, navigate to the General Info. tab and click on General Info., Now, from the drop-down menu, click on Company Profile.

On the company profile page for your company, navigate to the left of the page and click on the Contacts tab.

While on the Contacts, page, you are able to revise (i.e., add and/or delete) contacts for your company (i.e., the box titled Internal Contacts) and review contacts for the State of Ohio (i.e., the box titled Client Contacts).

https://supplier-emarketplace.ohio.gov
While on the Contacts page, navigate to the box titled Internal Contacts to complete the following contact management options for your company:

a) **Remove a Company Contact**:
   1) Find the company contact you want to remove and click on the **X Icon** (❌) next to their name (e.g., John Doe).
   2) A pop-up will appear towards the top of the page confirming you want to remove the contact (e.g., John Doe). Click **Ok** in the pop-up to confirm and finalize your request.

b) **Associate a Company Contact IN Ohio eProcurement**:
   1) Towards the top of the Internal Contacts box, click the **Add an Existing Contact** button to find a company contact already in Ohio eProcurement, and, for example, add them to a contract.
   2) Within the pop-up titled Select Contacts, either utilize the search functionalities towards the top or scroll through the automatically generated list of company contacts associated with your company. Once you find the company contact you want to add, click the **Check Box Icon** (☑️) next to the individuals name.
   3) Once you have clicked the Check Box Icon next to each company contact you want to add, navigate to the top of the pop-up and click **Close**. The contact is now listed within the Internal Contacts box on the Contacts page.

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c) **Associate a Company Contract NOT IN Ohio eProcurement:**

1) Towards the top of the Internal Contacts box, click the Plus Icon (➕) to add a company contact not already in Ohio eProcurement, and, for example, add them to a contract.

2) Within the pop-up titled Supplier Contact Management, complete the mandatory and/or optional information in the Identity box (e.g., last name, first name, e-mail) and the Address box.

3) Click the **Save & Close** button.

4) Although you have added a company contact, you must invite the company contact to log in. Click on the **Mail Icon** (✉️) next to the newly added company contact.

5) Within the pop-up titled Invite a Supplier Contact to Login, you can alter the subject and body of the invite. Once you complete any necessary revisions, go towards the top of the pop-up and click the **Send Invitation** button.

   **⚠️** Do not alter the hyperlink in the body (i.e., “Click Here to Access the eProcurement Website”)

6) Once you click the Send Invitation button, you will receive a confirmation that your invitation to register has been sent to the contact. Click the **Close** button towards the top of the pop-up.

   **⚠️** Ensure their e-mail address is present next to their name in the Contact column to confirm an e-mail was sent to the company contact.

d) **Change a User Role:**

- To change a User’s role, navigate to the column for Roles, click the drop-down menu, and select the applicable role(s). For the initial release of Ohio eProcurement, the only available roles are Supplier Admin and Order Contact. In future releases, more supplier roles will be available for use.

- You should assign users the Order Contact role if they are responsible for order processing (e.g., acknowledging Pcard orders). Users assigned this role will be shown to State buyers as suppliers contacts when they are submitting orders.