

How to Update Profile

Adding Roles

Updating the company's profile can only be done by the designated Profile Manager

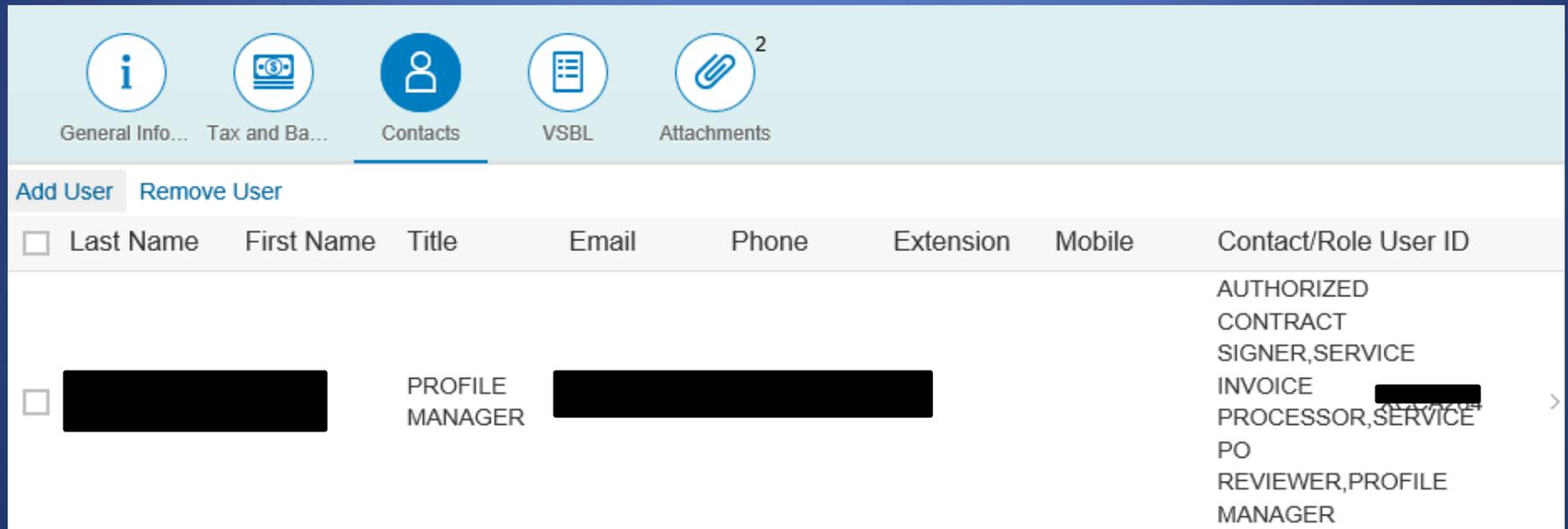
- If there is no profile manager, contact 402-544-0025 or email smg@up.com
- If the profile manager needs to be changed, please email smg@up.com with the company's vendor code or recent purchase order and the new profile manager's name to begin the change process

When logged in as Profile Manager, the Update Profile Tab will be present in the Create/Request Section on the SourceHub home screen

Create / Request

<p>Create and Subm... New, Rejected & Mo...</p> <p> 239 Pending</p>	<p>Create Mobile SES Submit Daily (DWR)</p> <p></p>	<p>Request Retentio... Notarized Request</p> <p></p>	<p>Update Profile Users, Location & W-9</p> <p></p>
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Contacts allows edit of authorized contacts as well as Roles



The screenshot displays a software interface with a navigation bar at the top containing five icons: 'General Info...', 'Tax and Ba...', 'Contacts' (selected), 'VSBL', and 'Attachments'. Below the navigation bar are two buttons: 'Add User' and 'Remove User'. A table with the following columns is shown: 'Last Name', 'First Name', 'Title', 'Email', 'Phone', 'Extension', 'Mobile', and 'Contact/Role User ID'. One row is visible, with the first two columns redacted by black boxes. The 'Title' is 'PROFILE MANAGER' and the 'Email' is also redacted. The 'Contact/Role User ID' column lists several roles: 'AUTHORIZED CONTRACT SIGNER, SERVICE INVOICE PROCESSOR, SERVICE PO REVIEWER, PROFILE MANAGER'. A right-pointing arrow is visible at the end of the table row.

<input type="checkbox"/>	Last Name	First Name	Title	Email	Phone	Extension	Mobile	Contact/Role User ID
<input type="checkbox"/>	[REDACTED]	[REDACTED]	PROFILE MANAGER	[REDACTED]				AUTHORIZED CONTRACT SIGNER, SERVICE INVOICE PROCESSOR, SERVICE PO REVIEWER, PROFILE MANAGER

Select a name to edit their info and Roles. Select “Add Roles” to add new roles to the user

 Edit User

*First Name:

*Last Name:

*Title:

*Email:

*Phone:

Extension:

Mobile:

Fax:

Relate User to Ordering Address:

+ Add Roles - Provides access the system

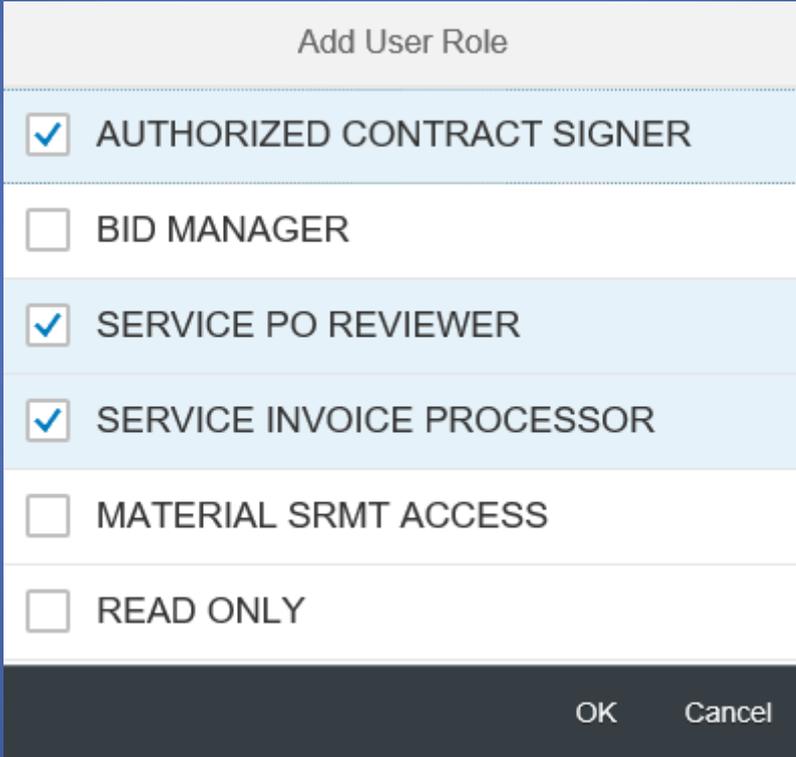
 AUTHORIZED CONTRACT SIGNER

 SERVICE PO REVIEWER

 SERVICE INVOICE PROCESSOR

+ Add Contacts - No access to system

After selecting “Add Roles”, a pop-up box will show up. Select the appropriate roles to add



The image shows a dialog box titled "Add User Role". It contains a list of roles with checkboxes. The roles "AUTHORIZED CONTRACT SIGNER", "SERVICE PO REVIEWER", and "SERVICE INVOICE PROCESSOR" are selected, indicated by blue checkmarks in their respective checkboxes. The other roles, "BID MANAGER", "MATERIAL SRMT ACCESS", and "READ ONLY", have unchecked checkboxes. At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

Role	Selected
AUTHORIZED CONTRACT SIGNER	Yes
BID MANAGER	No
SERVICE PO REVIEWER	Yes
SERVICE INVOICE PROCESSOR	Yes
MATERIAL SRMT ACCESS	No
READ ONLY	No

Click “OK” when finished

Click the Green “Update” button to save all updates

+ Add Roles - Provides access the system

	AUTHORIZED CONTRACT SIGNER
	SERVICE PO REVIEWER
	SERVICE INVOICE PROCESSOR

+ Add Contacts - No access to system