DIFS Existing Supplier Portal Self Service Job Aid

The District of Columbia has implemented a new financial system, DIFS – District Integrated Financial System, effective October 3, 2022. This requires registration of suppliers into the system. Once registered, suppliers will have the option to make updates to contact, address, banking, and business classification information as needed. This job aid shows step-by-step instructions for existing suppliers to make updates to their system profile.

Instructions

Thank you for your interest in doing business with the District. Please ensure your details such as designated contacts, address, banking, and business classification information is up-to-date. To update any information, please go to **https://cfo.dc.gov/supplier_portal** and click on the ***Existing Suppliers*** button. For questions, email us at suppliers@dc.gov, or call us at 202-442-6870 Monday through Friday, 8:00 a.m. to 5:00 p.m. ET.

PASS Suppliers Registered in the Ariba System Network (ASN)

If you are a registered PASS (Procurement Automated Source System) Supplier with the Ariba System Network (ASN), please do not update any HEADQUARTER address information, or any other organizational, or business classification through the Supplier Portal. Please contact the Procurement Center of Excellence (PCOE) at dcvendorportal@dc.gov to make those updates to your supplier profile. For other type of address updates - **including any remit to addresses or banking information**, please use the DIFS Supplier Portal.

If you are a non-PASS supplier, all addresses **and banking information**, including your "REMIT TO" address, must be updated using the DIFS Supplier Portal.

Updating Supplier Information

This document provides step-by-step instructions for updating information in your supplier profile. Select the appropriate section below for further instructions:

How to use this Job Aid

- Within the DIFS Supplier Portal, required fields are indicated by an asterisk (*).
- **There are some fields in DIFS that are not required; however, they are required in the DIFS Supplier Process – these fields are highlighted in yellow and bolded**. ***Please be sure to enter information in these fields, or this can delay your account being approved.***
- This symbol will indicate an important note.

System Requirements

- **Default Browser:** For best performance of Oracle Fusion Applications, use the latest browser version of Mozilla Firefox. Other browsers that can be used include Apple Safari, Google Chrome, Internet Explorer to be the fastest, in that order.
- **Blocked Pop-ups**: Fusion Application Notifications are opened as pop-ups. If you have the Pop-ups disabled by default as per your security policies, the browser will block the notifications from Fusion Applications.
- **Site Exceptions:** Here are the URLs for all Fusion Applications notifications in order to add them as exceptions (e.g., Chrome):
    1. Navigate within the browser, e.g., Chrome > Settings > Show advanced settings > Privacy > Content Settings > Pop-ups > Manage exceptions
    2. Add these exceptions:
        - [*.]oracle.com
        - [*.]oraclecloud.com
        - [*.]oracleoutsourcing.com

Log into the Supplier Portal

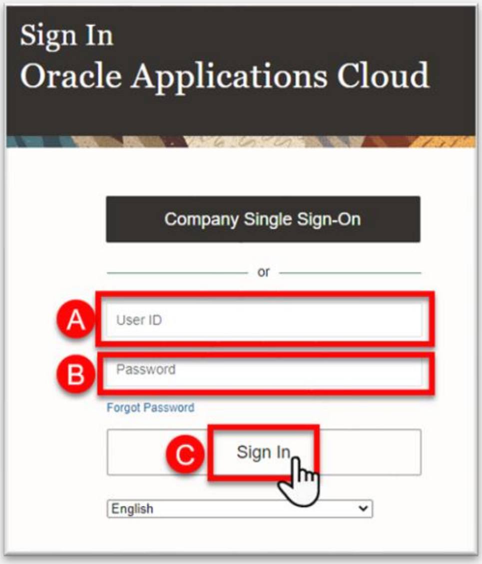
1 **Oracle Applications Cloud Sign In** page

- Go to the Supplier Portal Registration webpage at **https://cfo.dc.gov/supplier_portal** and click on the ***Existing Supplier*** button.
- The ***Sign In Oracle Applications Cloud*** page will display

A. In the **User ID** field, enter the email address registered with your supplier record

B. In the **Password** field, enter your password

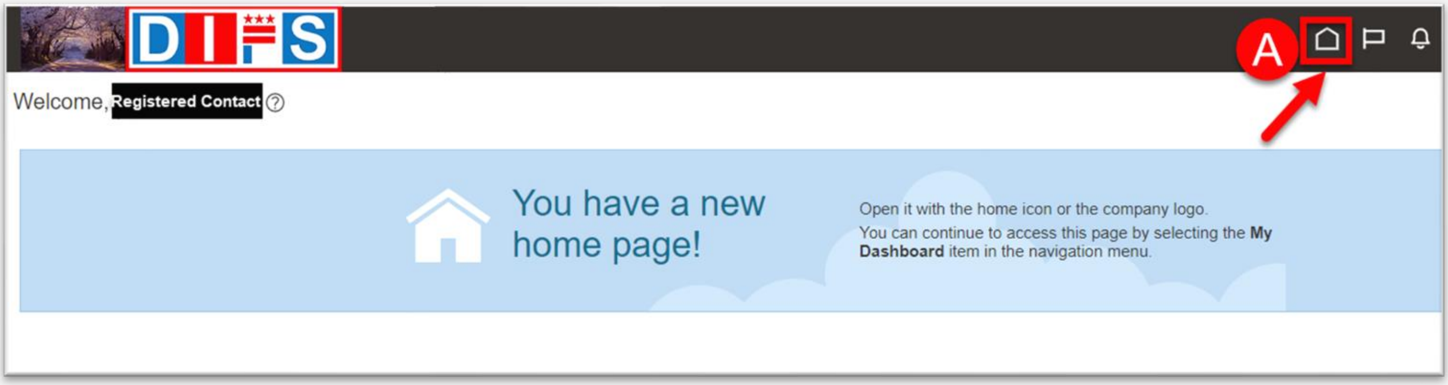
C. Click the **Sign In** button



2 Navigating the Supplier Portal

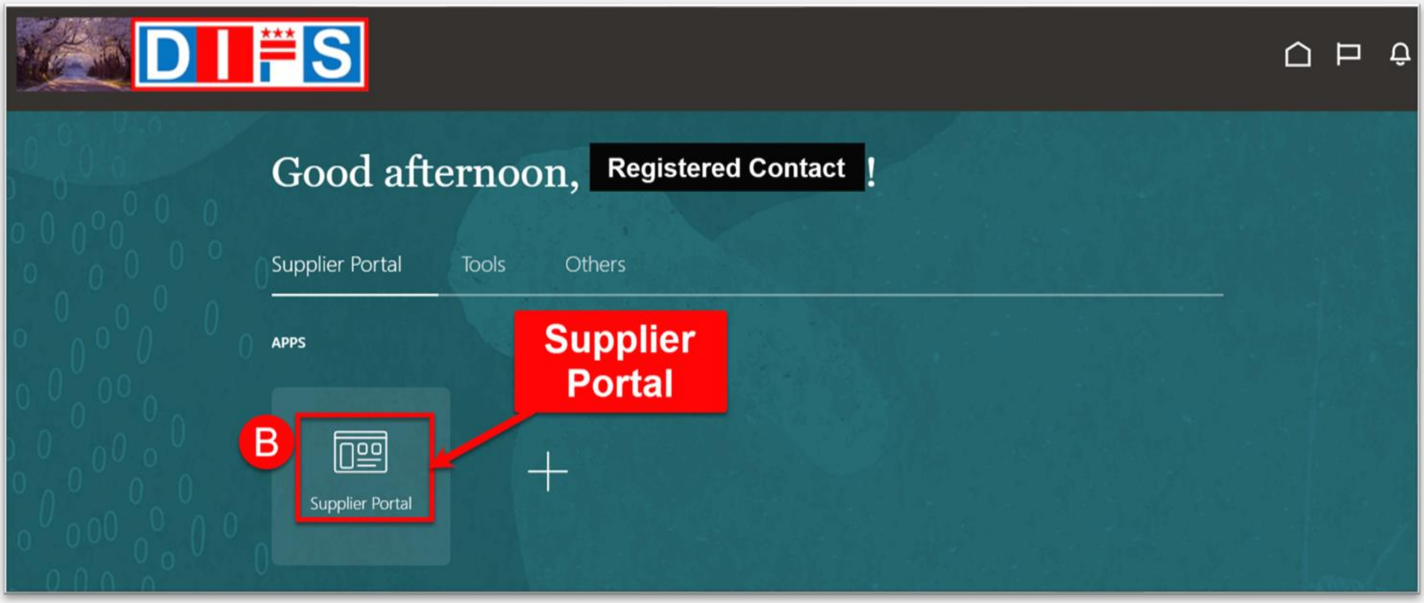
When you first log into the Supplier Portal, a Welcome page displays with your name.

A. Click the Home icon to access the Supplier maintenance screens.



The Oracle Dashboard screen displays.

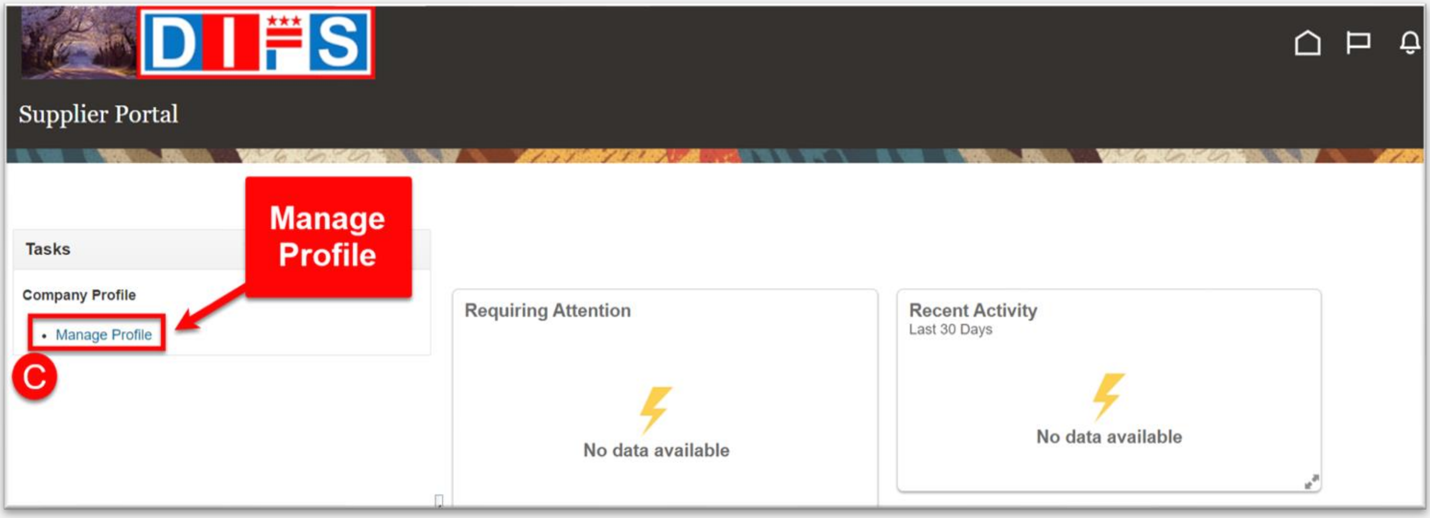
B. Click the **Supplier Portal** link or icon



2 Navigating the Supplier Portal (continued)

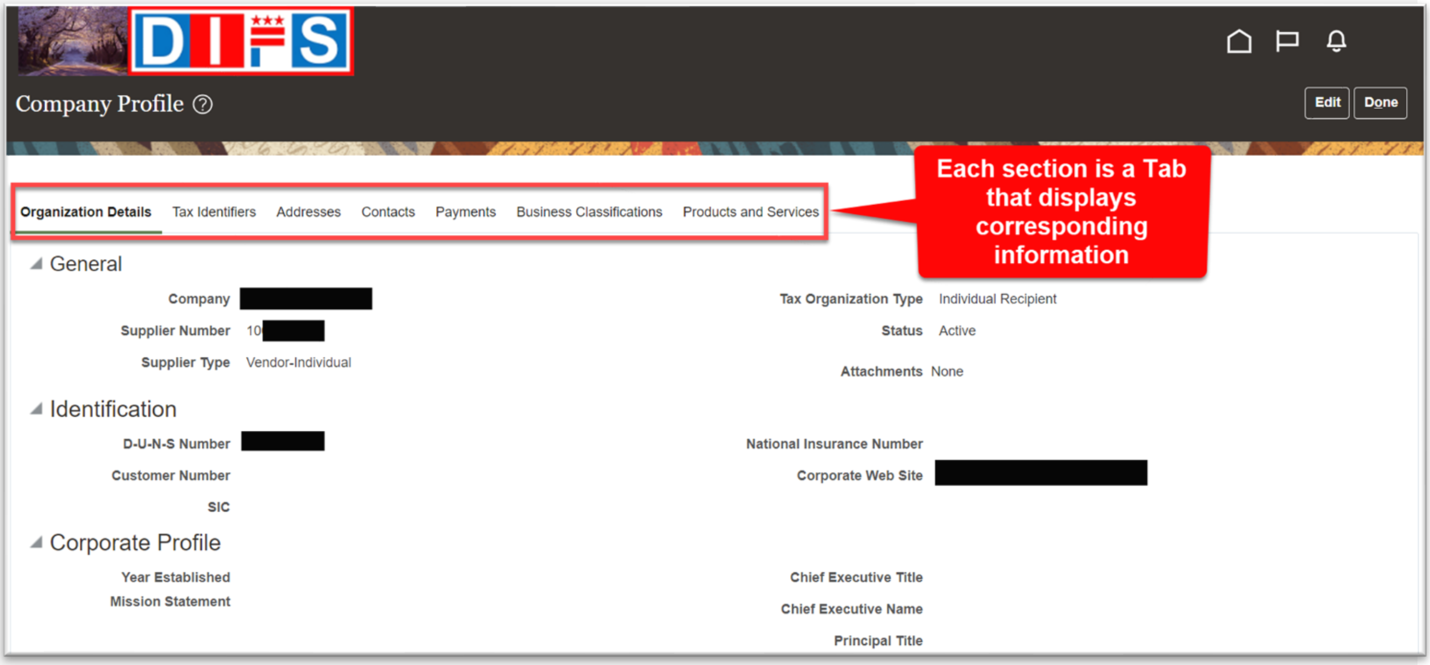
The Supplier Portal screen displays.

C. Under the **Tasks** section, **Company Profile**, click **Manage Profile**



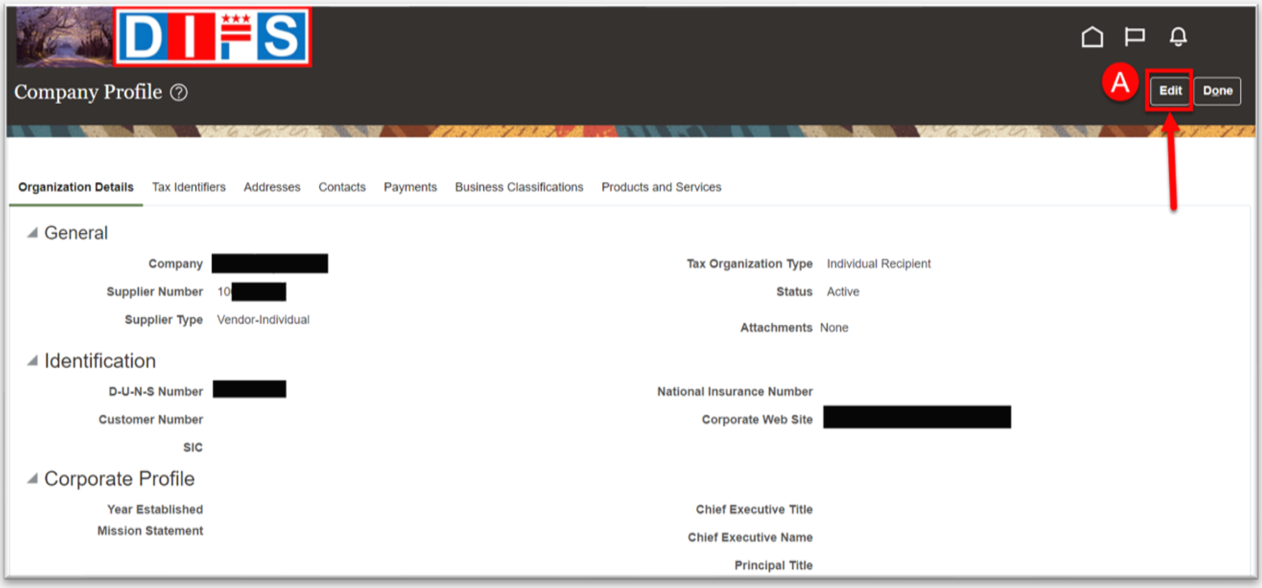
The **Company Profile** page displays and contains the following tabs at the top of the page. Check out each tab and verify the information contained therein. The following pages explain how to modify the information.

- Organization Details
- Tax Identifiers
- Addresses
- Contacts
- Payments
- Business Classifications



3 Creating a Change Request to Modify Supplier Information

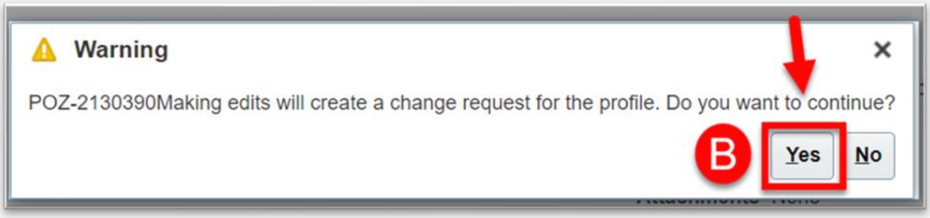
A. To make updates to your supplier information click the **Edit** button



A **Warning** window displays with the following message:

“POZ-2130390Making edits will create a change request for the profile. Do you want to continue?”

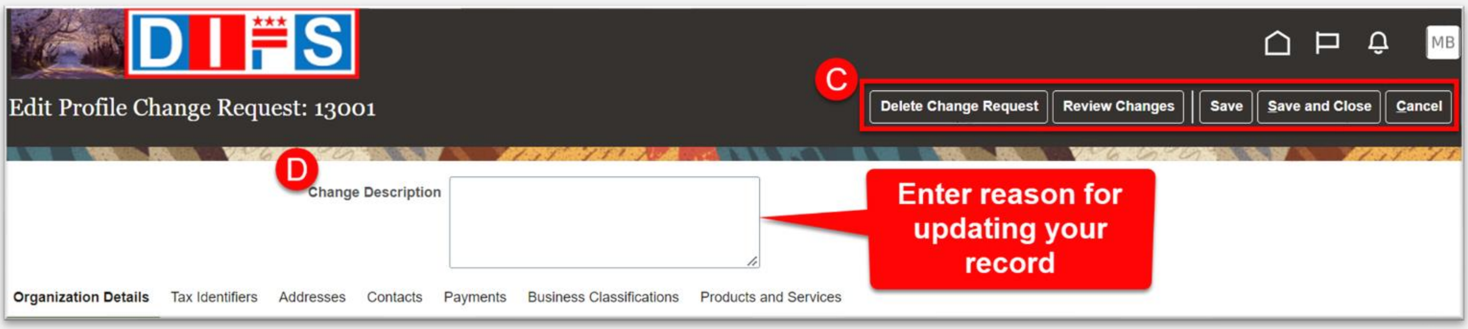
B. Click the **Yes** button



The name of the screen changes from **Company Profile** to **Edit Profile Change Request**

C. Additional buttons appear at the top of the screen

D. In the **Change Description** field, enter the reason for updating the supplier record



4 Updating Address Information – Modifying an Existing Address

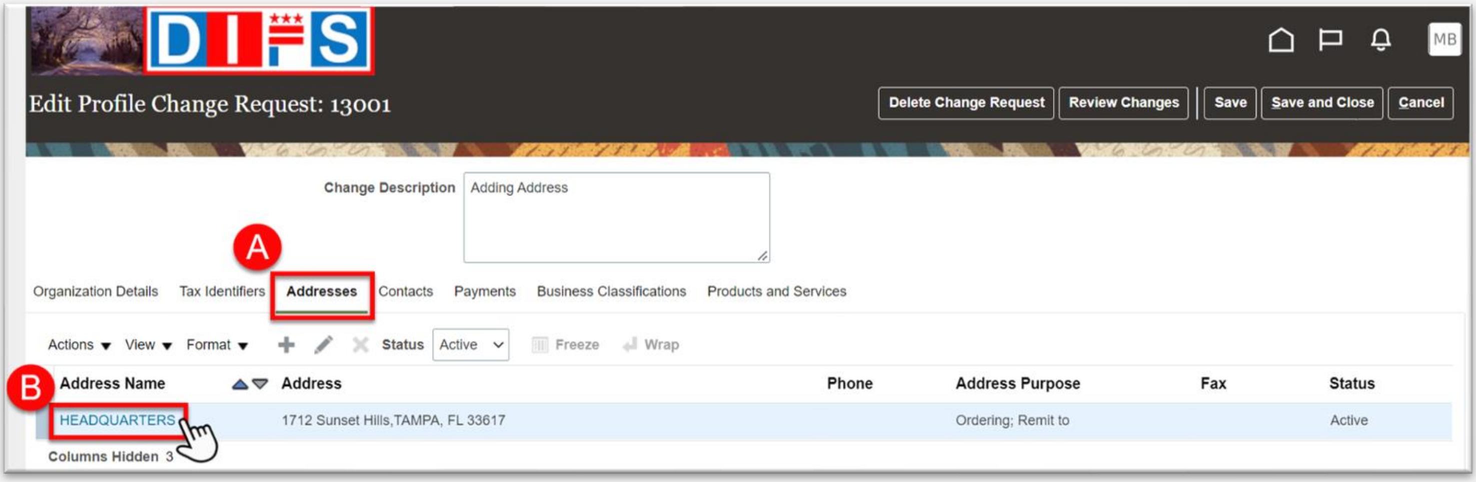
To modify an existing address, do the following steps:

A. Click on the **Addresses** tab

B. Click on the Address Name

Note: If you are a registered PASS (Procurement Automated Source System) Supplier with the Ariba System Network (ASN), please do not update any HEADQUARTER address information, or any other organizational, or business classification through the Supplier Portal. Please contact the Procurement Center of Excellence (PCOE) at dcvendorportal@dc.gov to make those updates to your supplier profile. For other type of address updates - **including any remit to addresses or banking information**, please use the DIFS Supplier Portal.

If you are a non-PASS supplier, all addresses **and banking information**, including your "REMIT TO" address, must be updated using the DIFS Supplier Portal.



The ***Edit Address*** window opens. Modify the following address fields as needed: (screenshot on the next page)

C. **Address Name (required)** – Enter the name of the address using one of the following names in ALL CAPS:

1. HEADQUARTERS – this is the address on the IRS Form W-9 or IRS Form W-8BEN
2. REMIT TO - if entering multiple REMIT TO addresses, include a dash in the REMIT name, i.e., REMIT TO-1
3. ORDERING

D. **Country (required)** – This defaults to *United States*. Select the correct country name if the default does not apply

4 Modifying an Existing Address (continued)

E. **Address Line 1 (required)** – Enter the first address line information. Headquarters address cannot be a P.O. Box address

F. Address Line 2 (optional) – Enter the second address line information (i.e., Suite or Apartment number, building name)

G. **City (required)** – Enter the name of the city

H. **State (required)** – Select the state name from the dropdown list of values

I. **Postal Code (required)** – Enter the zip code

J. Language (optional) – Select a preferred language

K. **Address Purpose (required)** – Select one or more options below.

- Ordering – Select if receiving Purchase Orders to this address
- Remit to – Select if receiving Payments to this address

L. **Phone (required)** – Enter phone number, starting with the country code

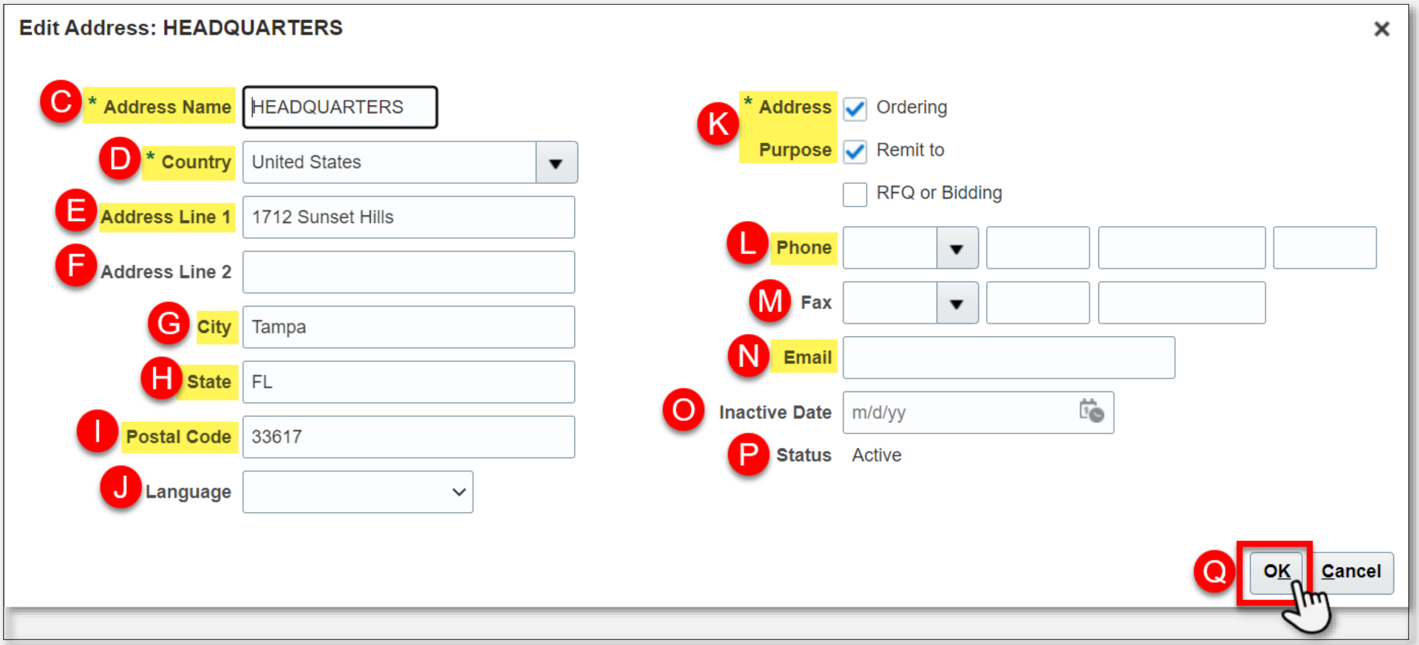
M. Fax (optional) – Enter fax number, starting with the country code

N. **Email (required)** – Enter email for a contact for this address

O. Inactive Date (optional) – If disabling this address, enter the end date to disable the address

P. Status – Provides the status of the address, if it is Active or Inactive

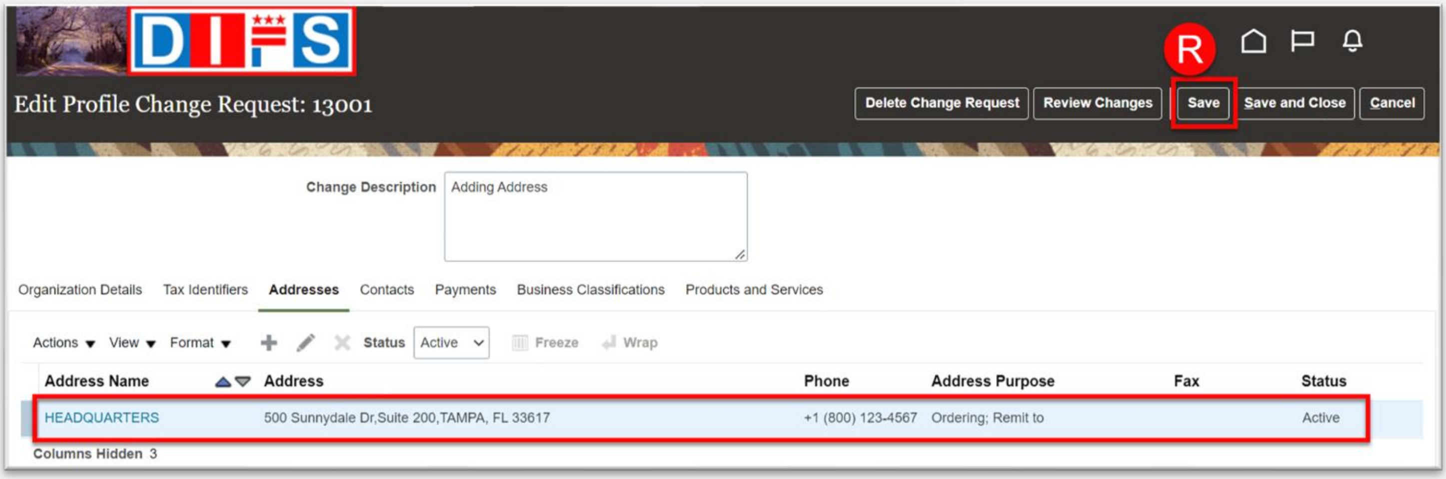
Q. Click the **OK** button to save the information



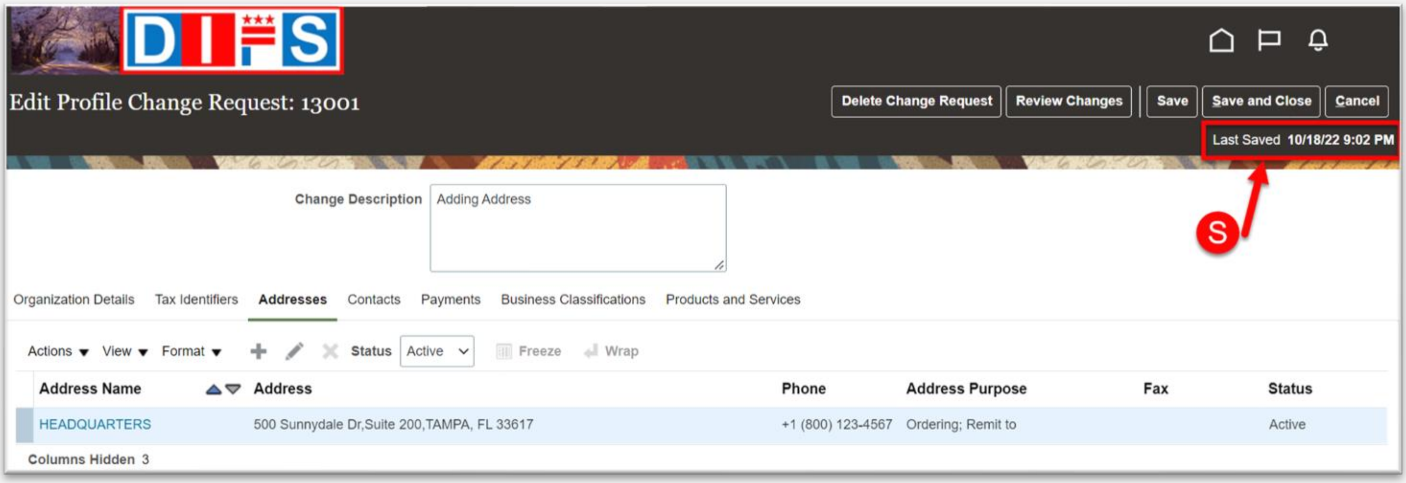
4 Modifying an Existing Address (continued)

The **Edit Profile Change Request** page displays the updated address.

R. Click the **Save** button



S. The Saved information will display on the page



5 Updating Address Information – Adding a New Address

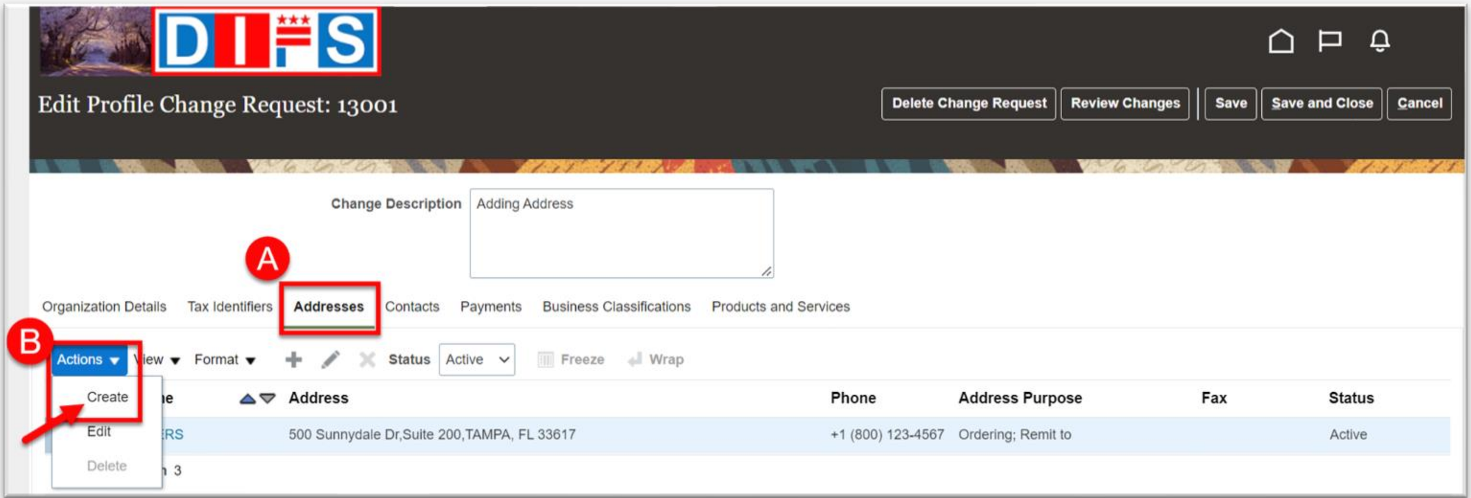
To add a new address, do the following steps:

A. Click on the **Addresses** tab

B. Click on **Actions > Create**

Note: If you have a purchase order (i.e., you are a PCOE vendor), please contact dcvendorsupport@dc.gov to update your Headquarter address; for other addresses, use the DIFS Supplier Portal.

If you are a non-PCOE vendor, all addresses, including your "Remit to" address, must be updated using the DIFS Supplier Portal.



The ***Create Address*** window opens. Enter the address information. (screenshot on the next page)

C. **Address Name (required)** – Enter the name of the address using one of the following names in ALL CAPS:

1. HEADQUARTERS – this is the address on the IRS Form W-9 or IRS Form W-8BEN
2. REMIT TO - if entering multiple REMIT TO addresses, include a dash in the REMIT name, i.e., REMIT TO-1
3. ORDERING

D. **Country (required)** – This defaults to *United States*. Select the correct country name if the default does not apply

5 Adding a New Address (continued)

E. Address Line 1 (required) – Enter the first address line information. Headquarters address cannot be a P.O. Box address

F. Address Line 2 (optional) – Enter the second address line information (i.e., Suite or Apartment number, building name)

G. City (required) – Enter the name of the city

H. State (required) – Select the state name from the dropdown list of values

I. Postal Code (required) – Enter the zip code

J. Language (optional) – Select a preferred language

K. Address Purpose (required) – Select one or more options below.

- Ordering – Select if receiving Purchase Orders to this address
- Remit to – Select if receiving Payments to this address

L. Phone (required) – Enter phone number, starting with the country code

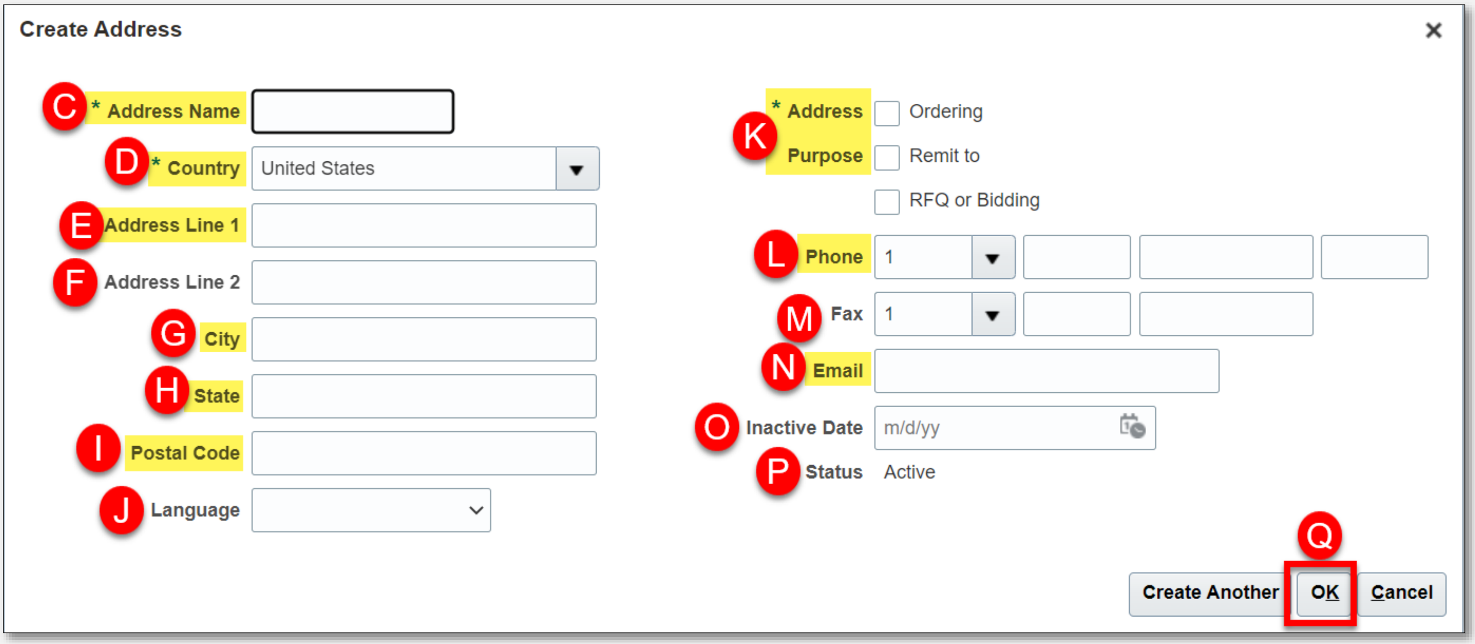
M. Fax (optional) – Enter fax number, starting with the country code

N. Email (required) – Enter email for a contact for this address

O. Inactive Date (optional) – If disabling this address, enter the end date to disable the address

P. Status – Provides the status of the address, if it is Active or Inactive

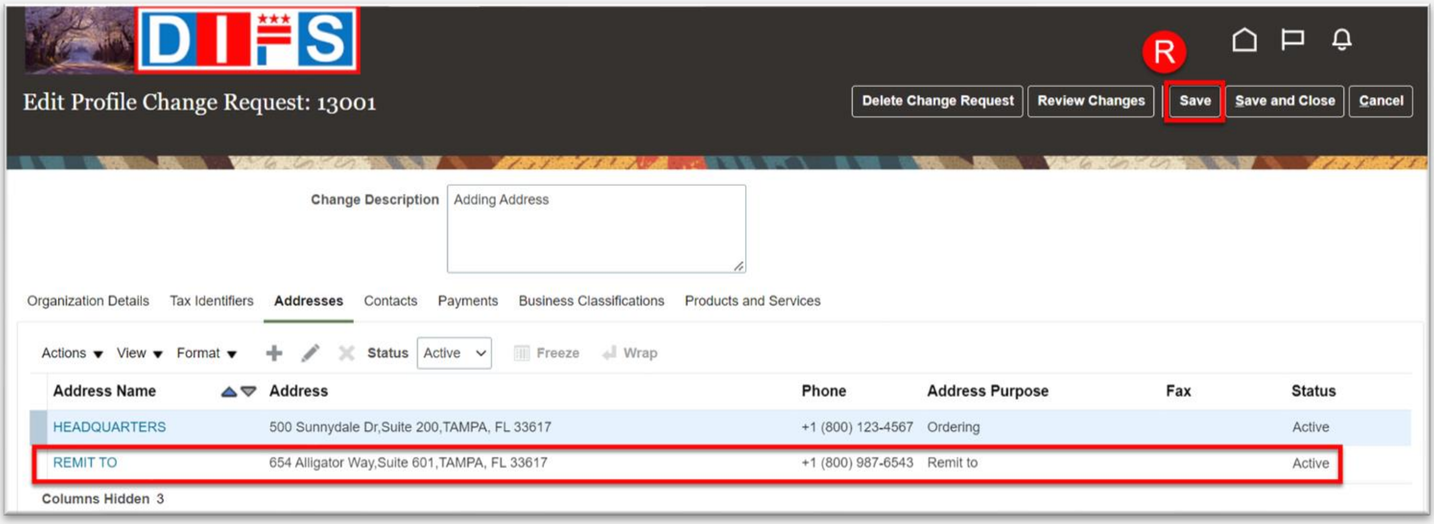
Q. When finished entering the address information, click the ***OK*** button



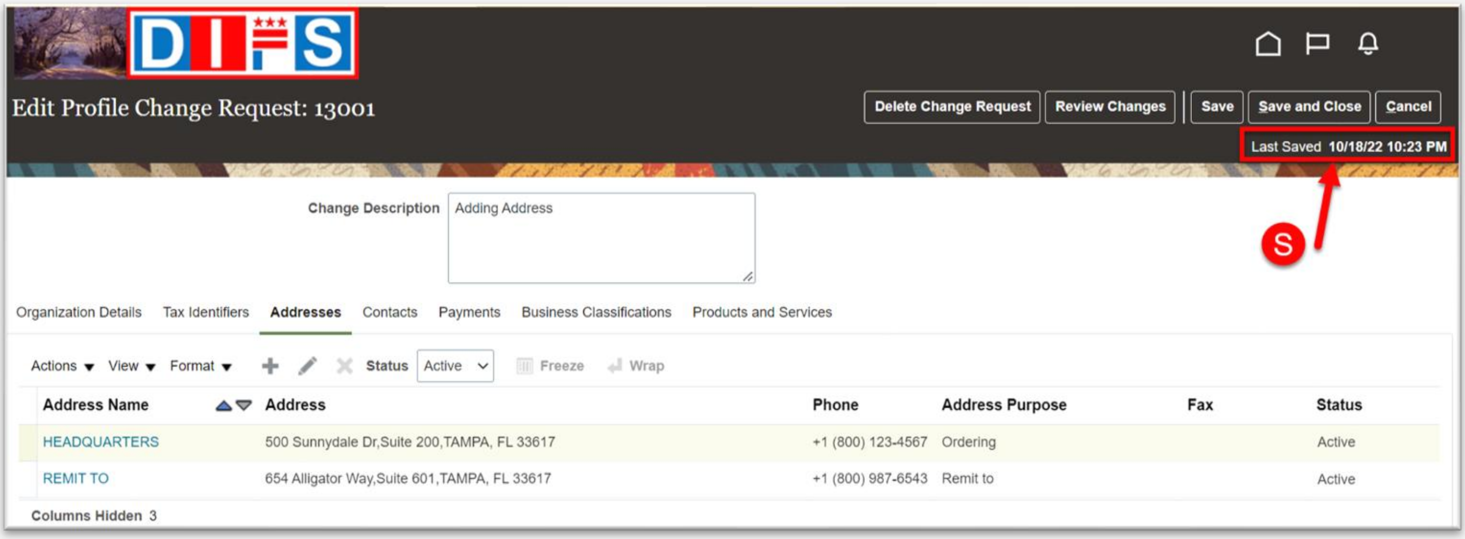
5 Adding a New Address (continued)

The **Edit Profile Change Request** page displays the new address.

R. Click the **Save** button



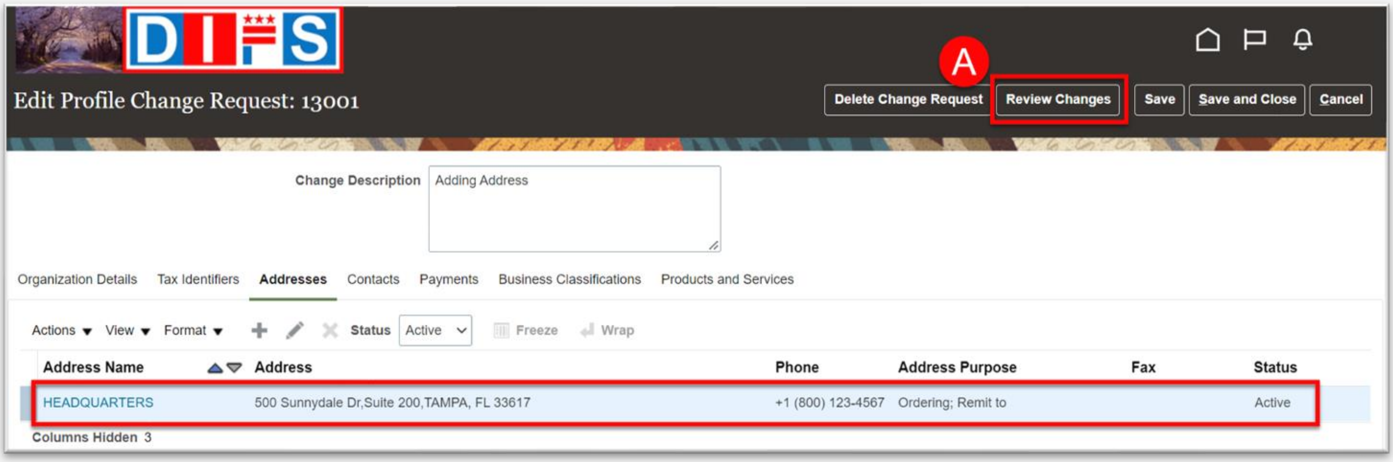
S. The Saved information will display on the page



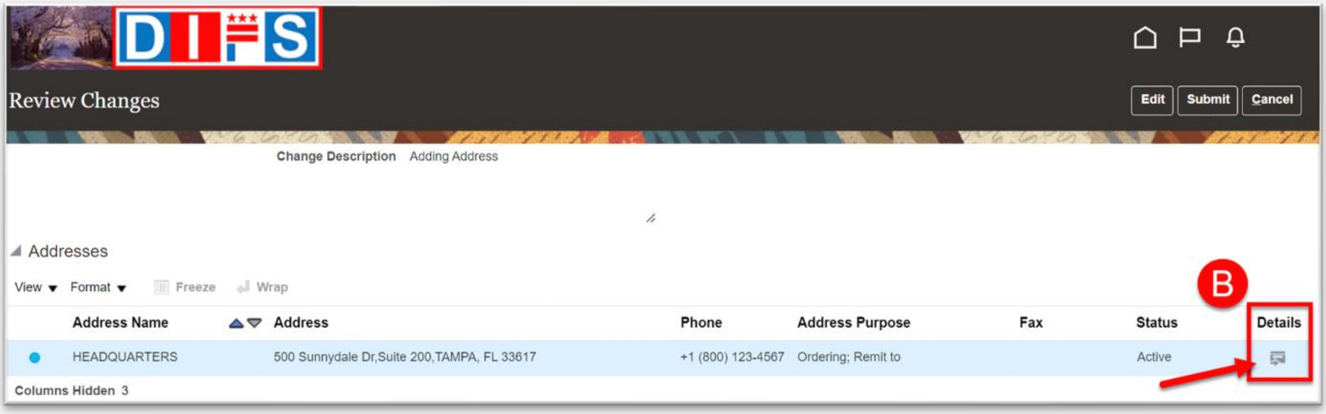
6 Addresses – Review Changes

After modifying or adding a new address, review the changes prior to submitting them for approval.

A. Click the **Review Changes** button

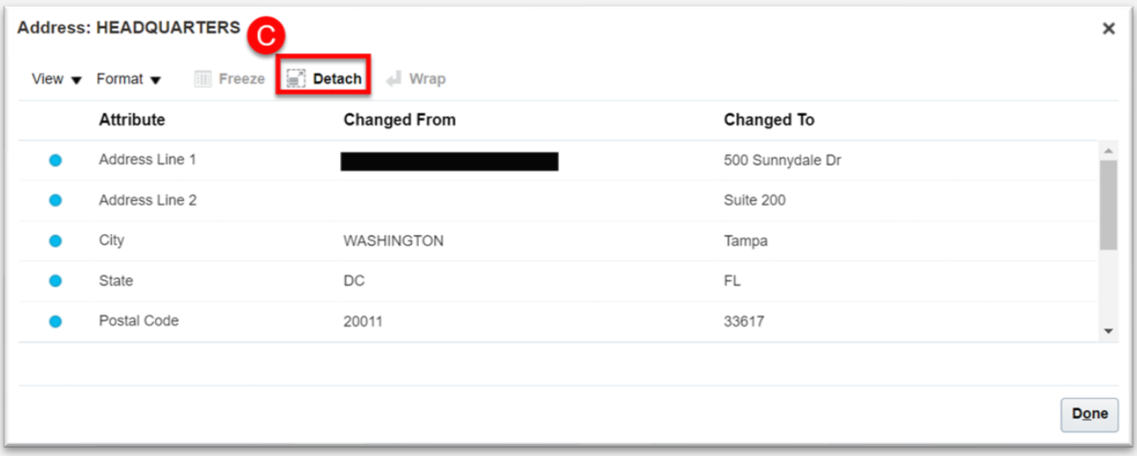


B. Click the **Details** button



The **Address** window opens and displays the **Changed From** and **Changed To** information

C. Click the **Detach** button to expand the window view

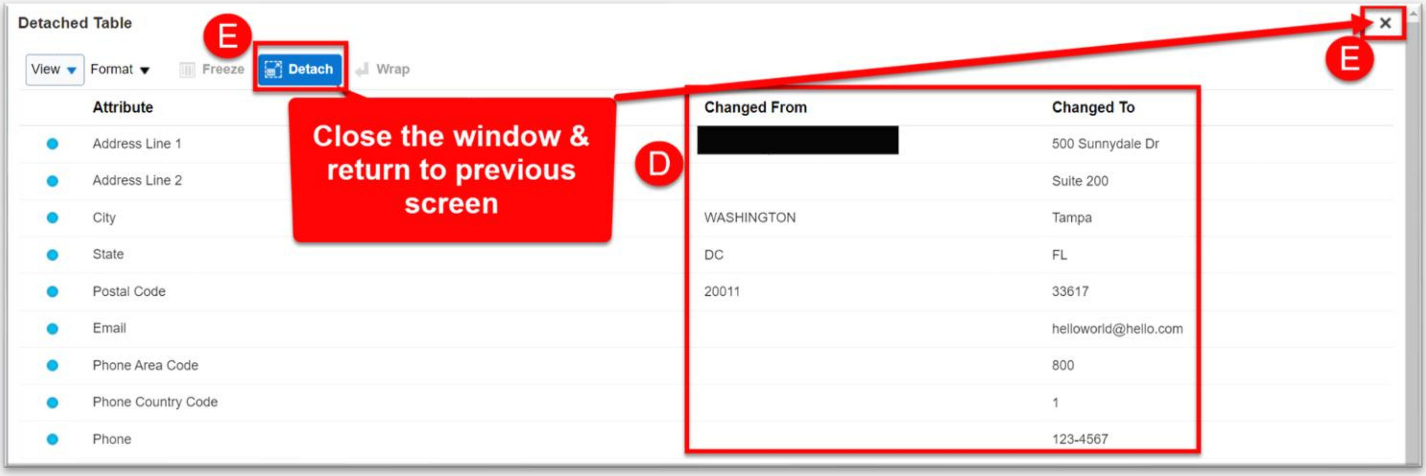


6 Addresses – Review Changes (continued)

The **Detached Table** window opens and displays the **Changed From** and **Changed To** information in full view

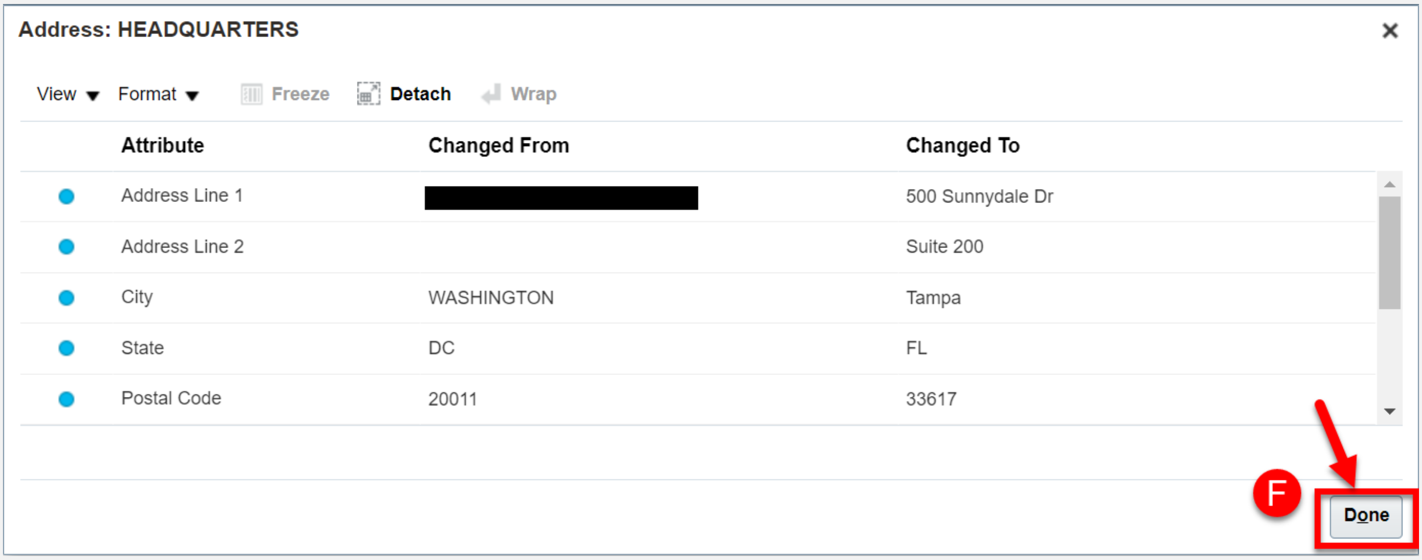
D. Review the information

E. To close the window, click the **Detach** button or the **X** on the top right corner of the page



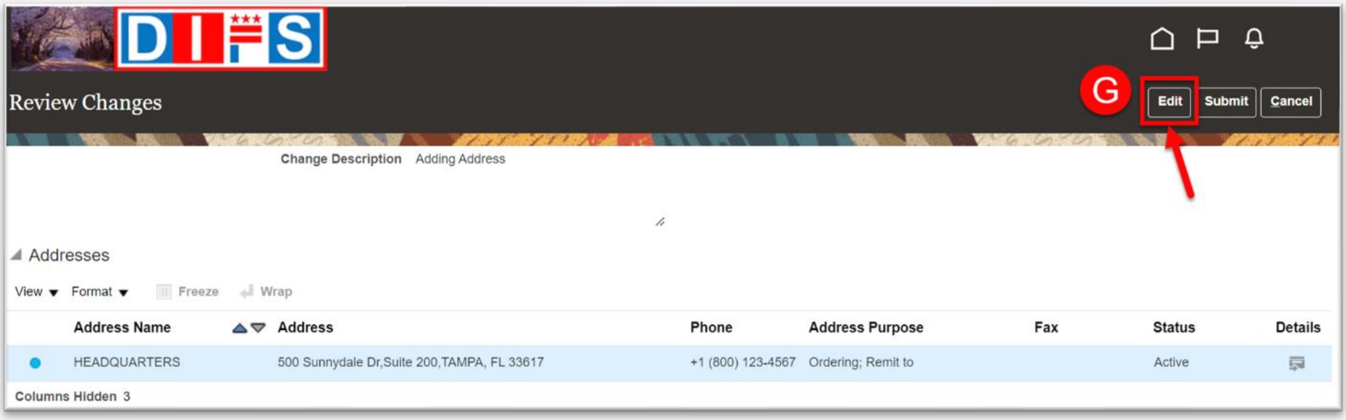
The **Address** window displays

F. Click the **Done** button



6 Addresses – Review Changes (continued)

G. To make any changes to the address, click the **Edit** button; otherwise click the **Submit button**



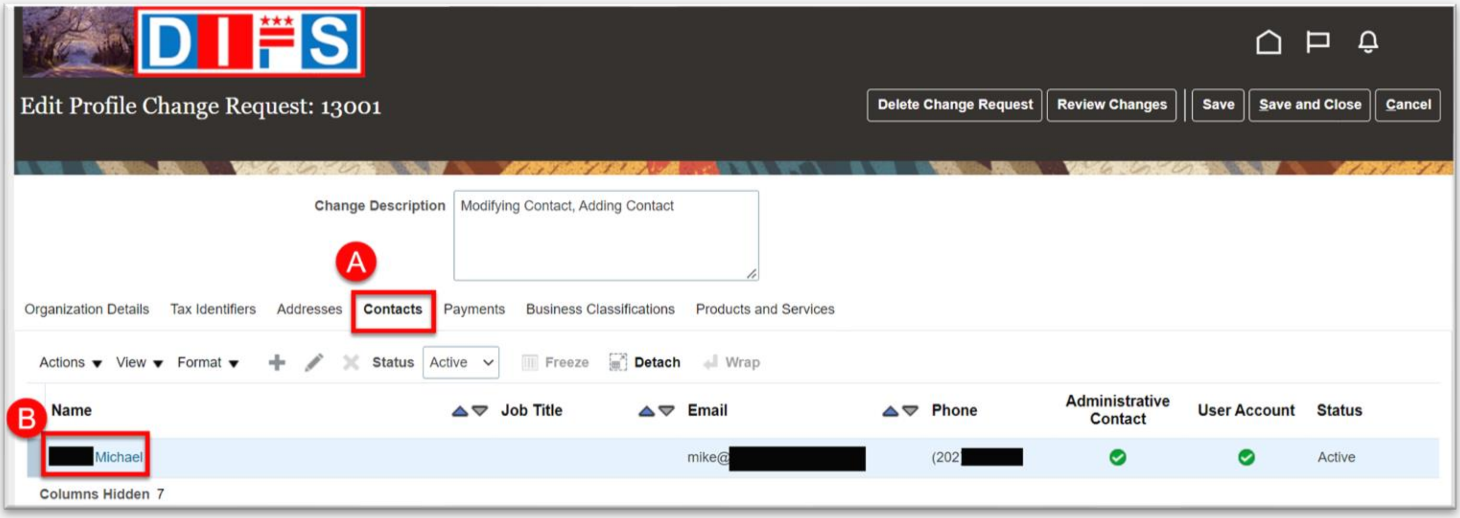
Note: To edit the information, proceed to Step 4 - Updating Address Information: Modifying an Existing Address and follow the steps to modify the address.

7 Updating Contacts Information – Modifying an Existing Contact

To modify an existing contact, do the following steps:

A. Click on the **Contacts** tab

B. Click on the Contact Name



The ***Edit Contact:*** window opens. Modify the following contact fields as needed: (screenshot on the next page)

C. Salutation (optional) – Select from the list of values a salutation of Mr., Mrs., or Ms.

D. First Name (required) – Enter the contact's first name

E. Middle Name (optional) - Enter the contact's middle name

F. Last Name (required) – Enter the contact's last name

G. Job Title (optional) – Enter the contact's job title

H. Administrative contact (defaults) – By default, this box will be checked for the contact designated as the Admin contact. Optionally, additional contacts can be added as either Admin or Non-Admin contacts – see Step 8 to create additional contacts

I. Phone or Mobile Number (required) – Must enter a phone number. Select the country code and enter either a Phone or Mobile telephone number

7 Modifying an Existing Contact (continued)

J. Fax (optional) – Enter the contact's fax number

K. Email (required) – Enter the email address for the contact

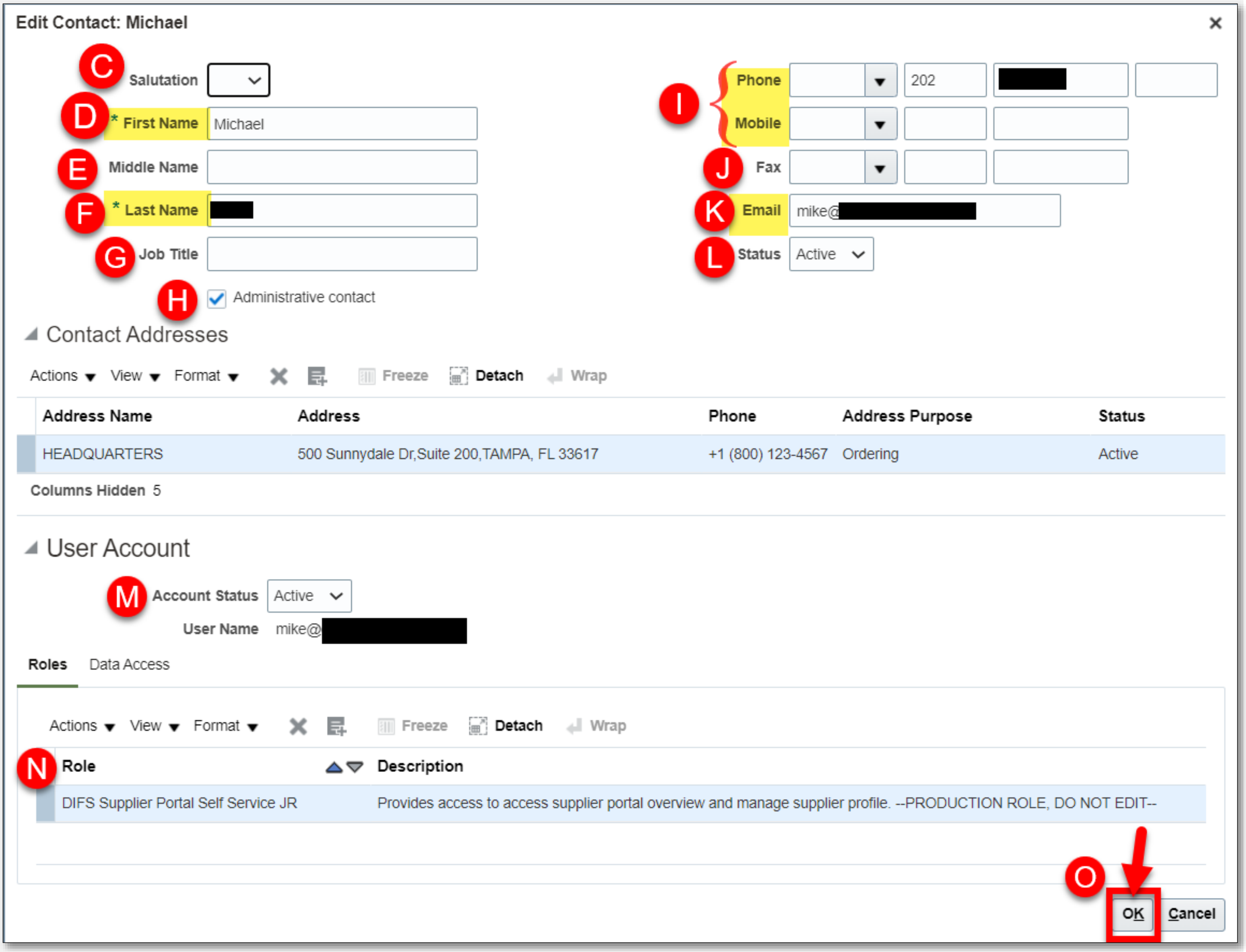
L. Status – Provides the status of the contact, if it is Active or Inactive

M. User Account: Account Status (defaults) – Provides the account status of the contact, if it is Active or Inactive

N. Role (defaults) – The role defaults to '**DIFS Supplier Portal Self Service JR** - Provides access to supplier portal overview and manage supplier profile.'

Note: Leave the default role information as is, Do Not Remove!

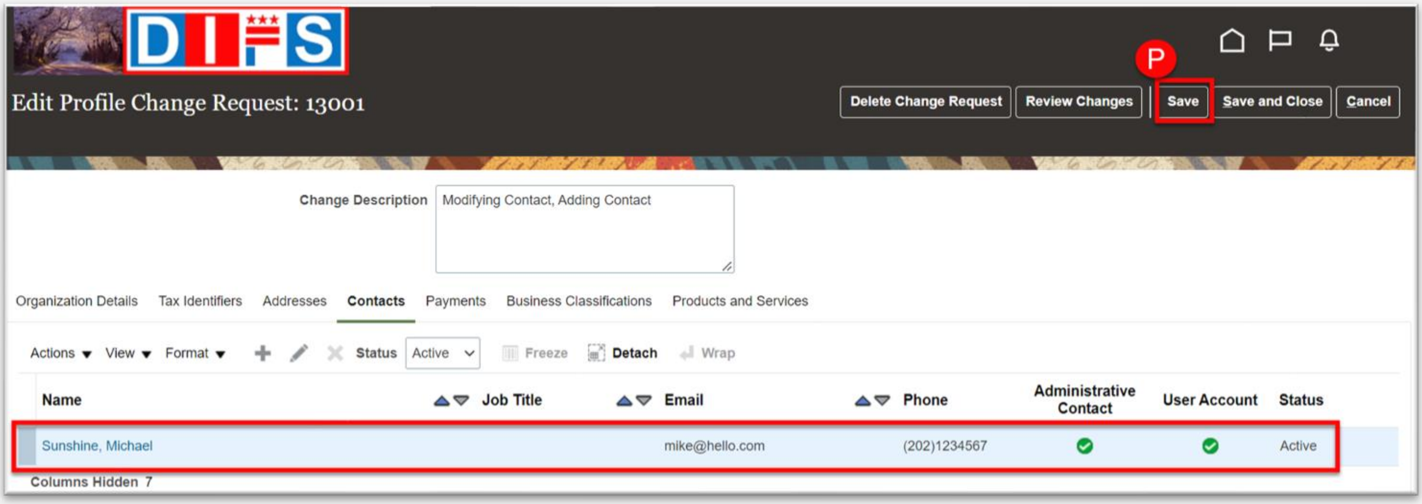
O. Click the ***OK*** button to save the information



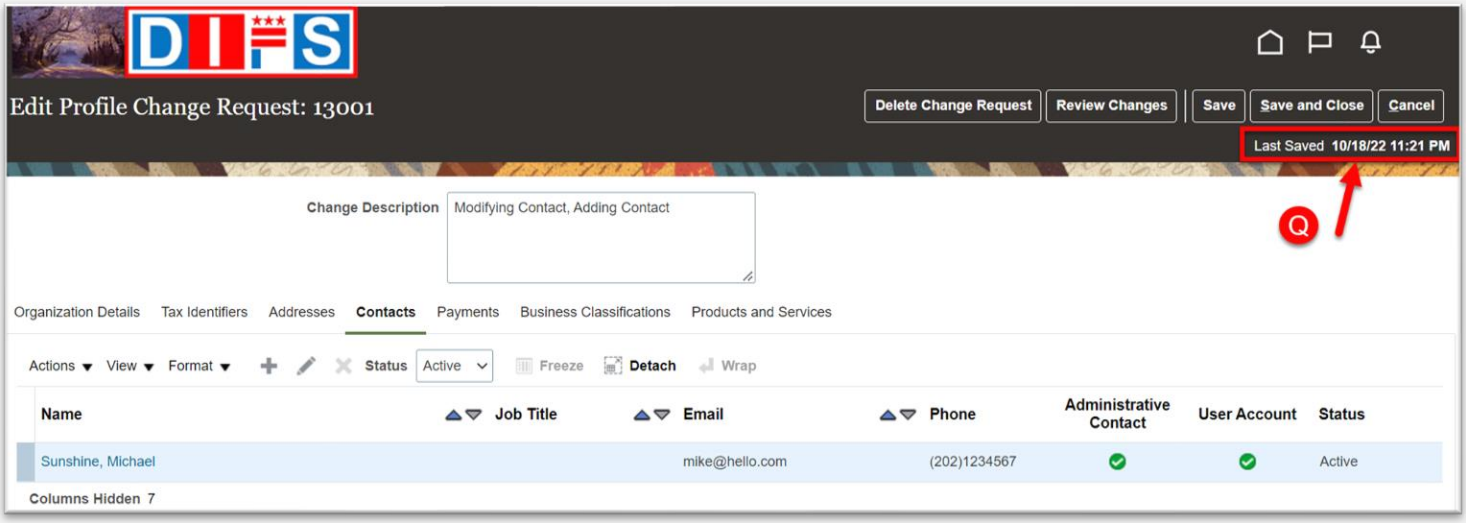
7 Modifying an Existing Contact (continued)

The **Edit Profile Change Request** page displays the updated contact.

P. Click the **Save** button



Q. The Saved information will display on the page

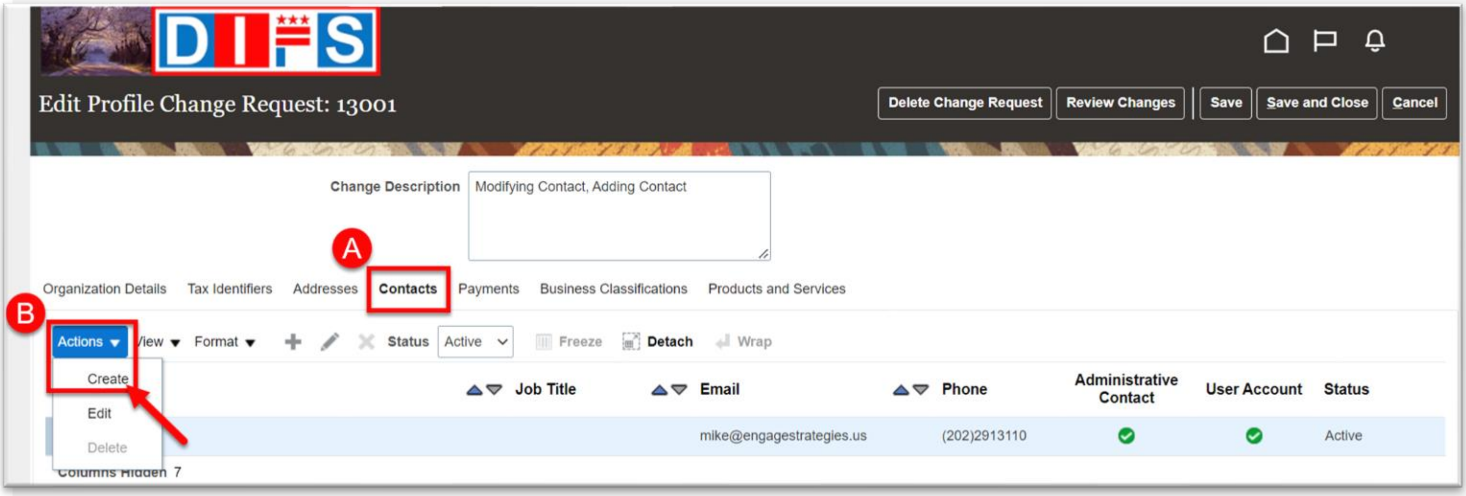


8 Updating Contacts Information – Adding a New Contact

To add a new contact, do the following steps:

A. Click on the **Contacts** tab

B. Click on **Actions > Create**



The ***Create Contact:*** window opens. Modify the following contact fields as needed: (screenshot on the next page)

C. Salutation (optional) – Select from the list of values a salutation of Mr., Mrs., or Ms.

D. First Name (required) – Enter the contact's first name

E. Middle Name (optional) - Enter the contact's middle name

F. Last Name (required) – Enter the contact's last name

G. Job Title (optional) – Enter the contact's job title

H. Administrative contact (optional) – Select the checkbox to indicate the contact is an administrative contact who will be able to maintain supplier information.

Note: Leave the box unchecked for Non-Administrative contacts who will perform other duties such as submit invoices

I. Phone or Mobile Number (required) – Must enter a phone number. Select the country code and enter either a Phone or Mobile telephone number

8 Adding a New Contact (continued)

J. Fax (optional) – Enter the contact's fax number

K. Email (required) – Enter the email address for the contact

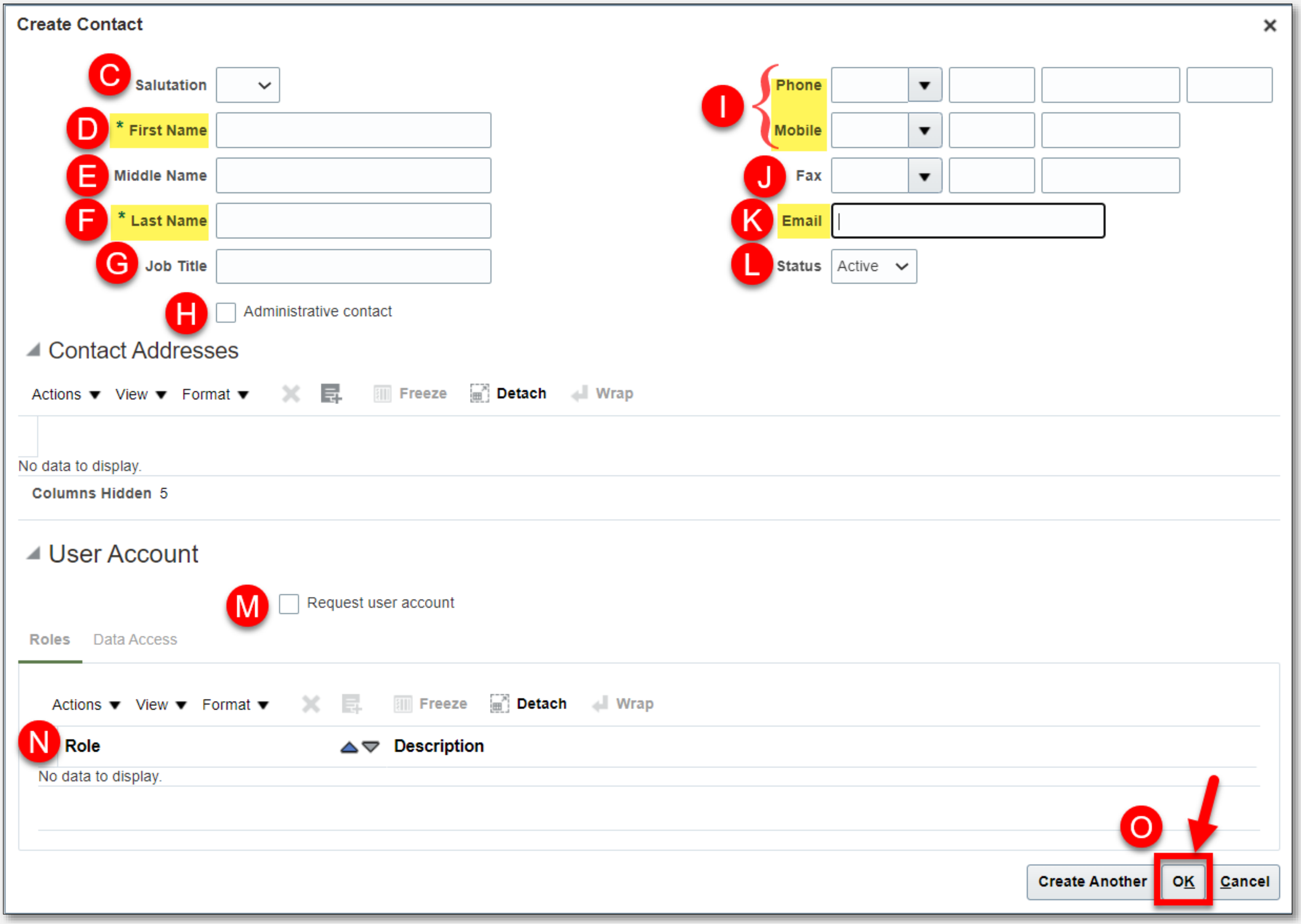
L. Status – Provides the status of the contact, if it is Active or Inactive

M. Request user account (optional) – Check this box for the contact to receive a user account to the email address provided

N. Role (defaults) – If 'Request user account' box is checked, the role defaults to 'DIFS Supplier Portal Self Service JR - Provides access to supplier portal overview and manage supplier profile.'

Note: Leave the default role information as is, Do Not Remove!

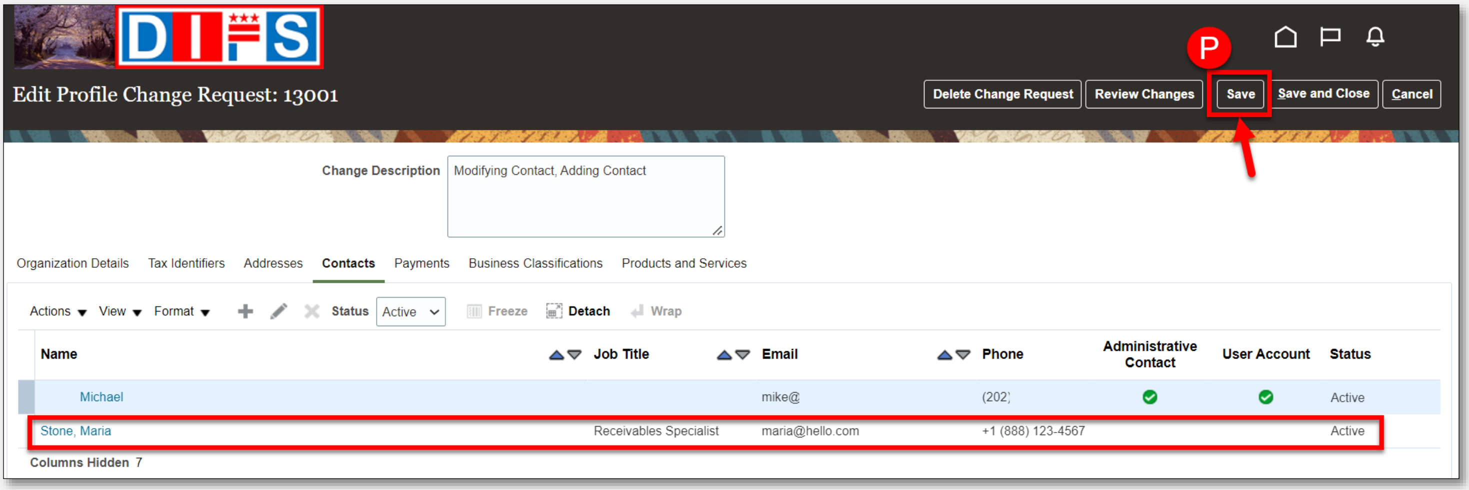
O. Click the ***OK*** button to save the information



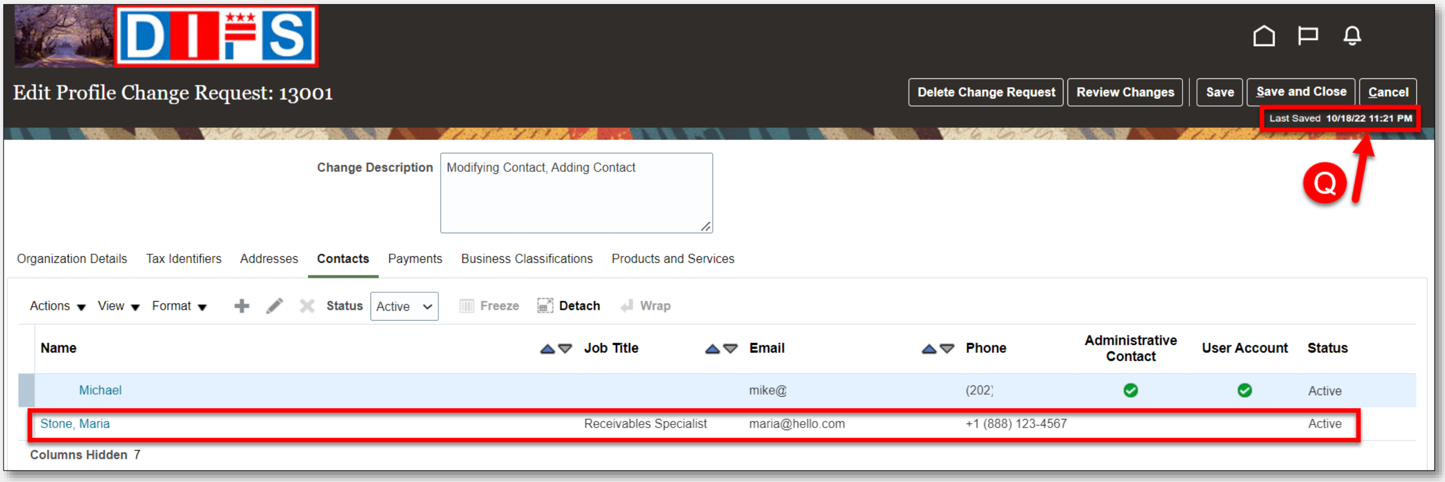
8 Adding a New Contact (continued)

The **Edit Profile Change Request** page displays the new contact.

P. Click the **Save** button



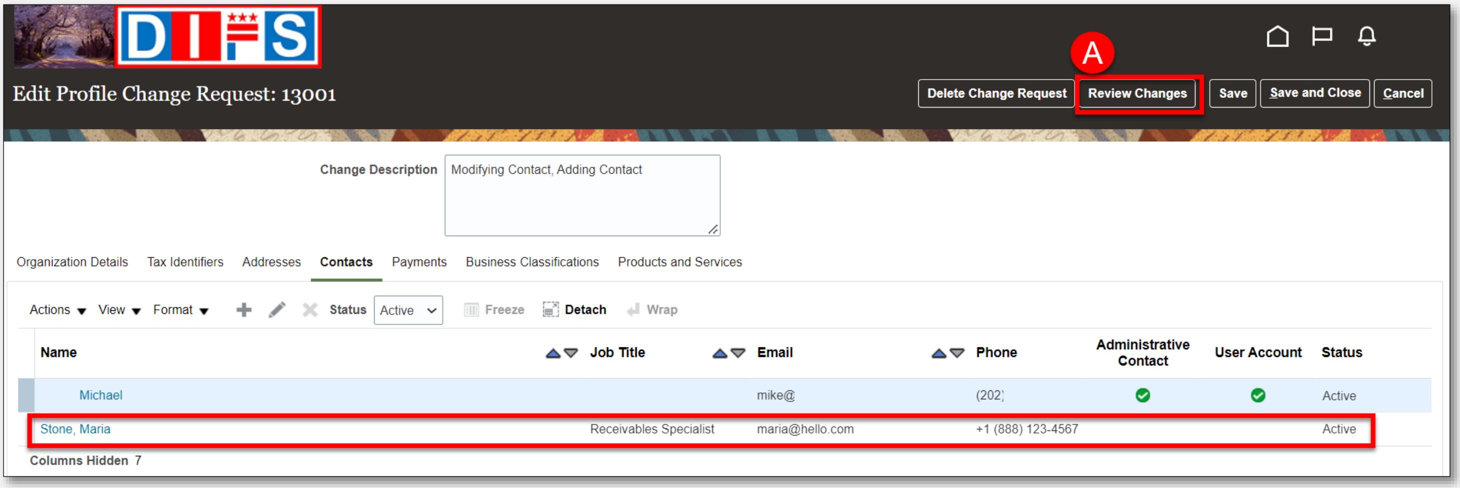
Q. The Saved information will display on the page



9 Contacts – Review Changes

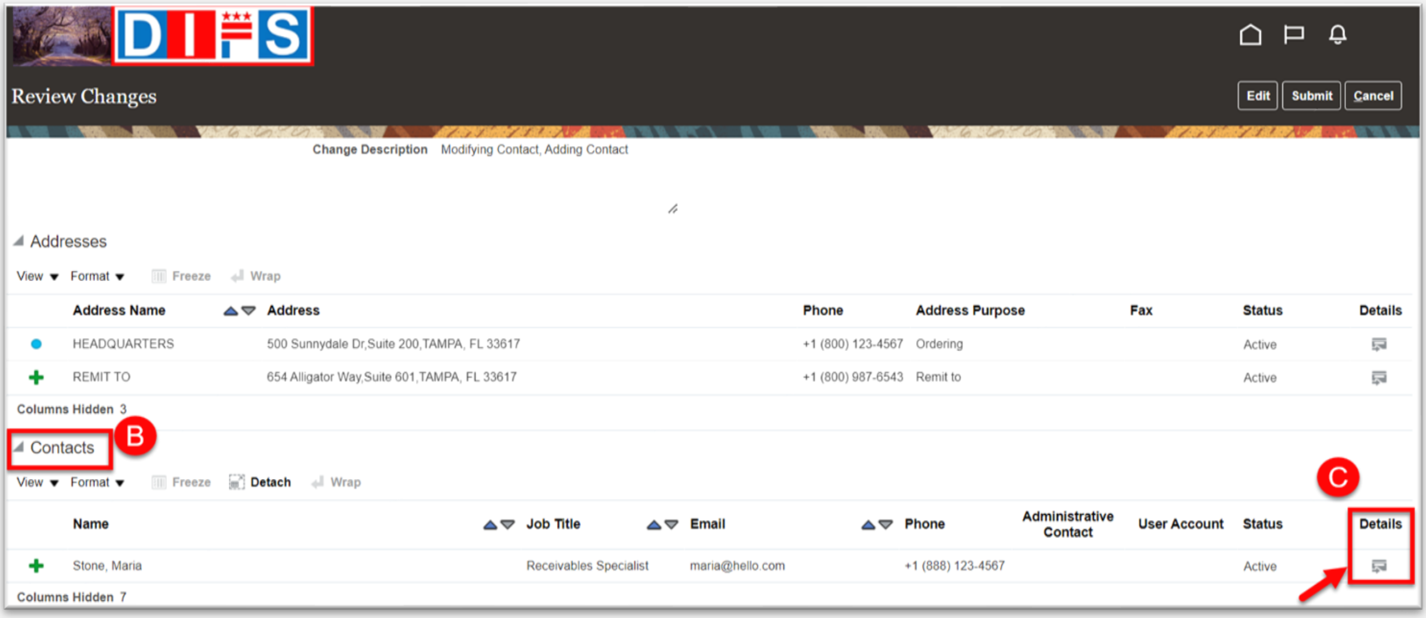
After modifying or adding a new contact, review the changes prior to submitting them for approval.

A. Click the **Review Changes** button



B. Go to the **Contacts** section

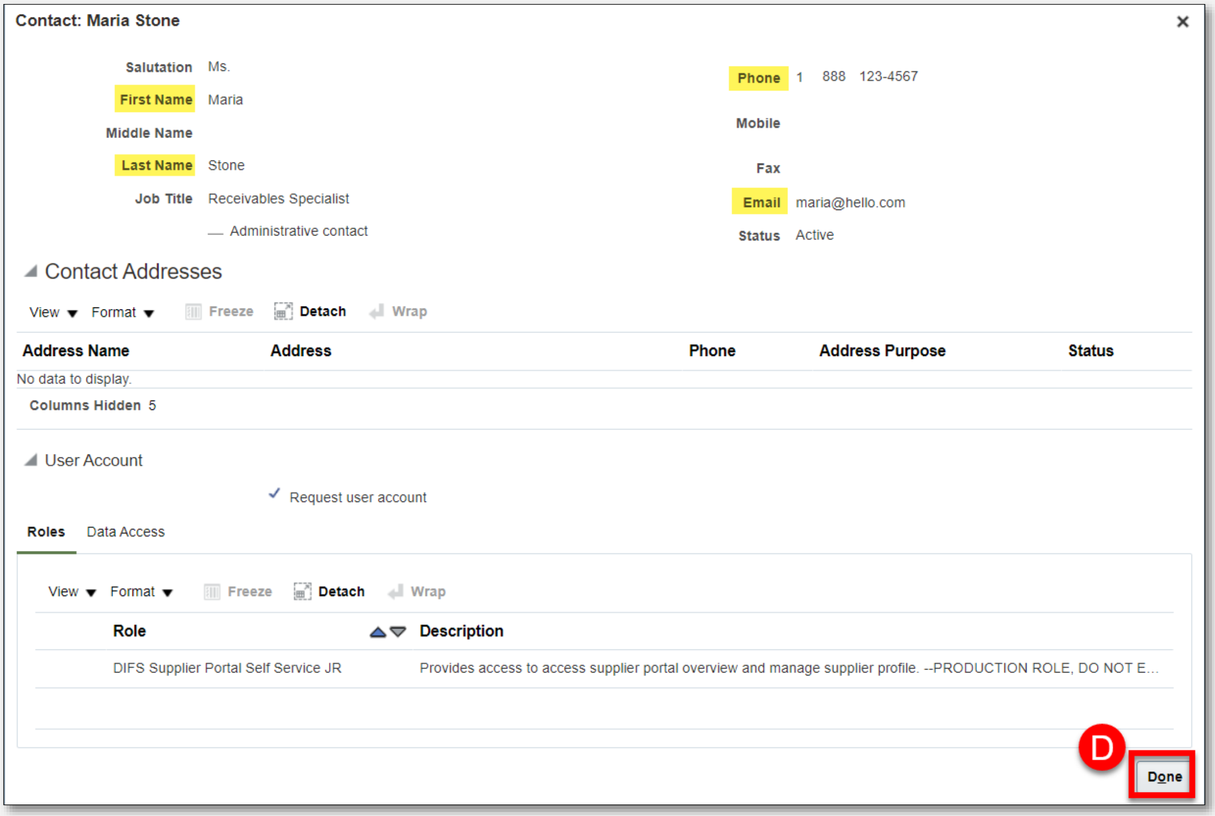
C. Click the **Details** button



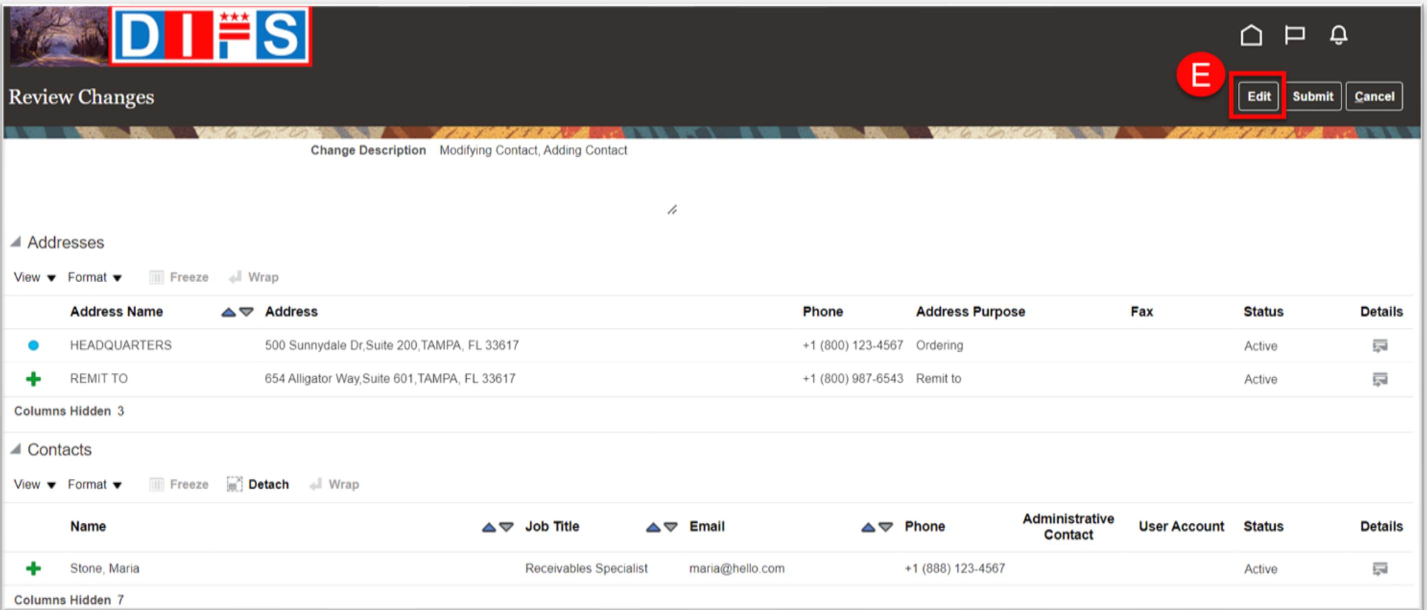
9 Contacts – Review Changes (continued)

The **Contacts** window opens and displays the **changed or new contact** information

D. After reviewing the information, click the **Done** button to close the window



E. To make any changes to the contacts, click the **Edit** button; otherwise click the **Submit button**



Note: To edit the information, proceed to **Step 7 - Updating Contact Information: Modifying an Existing Contact** and follow the steps to modify the address.

10 Updating Payment Information – Modifying an Existing Bank Account

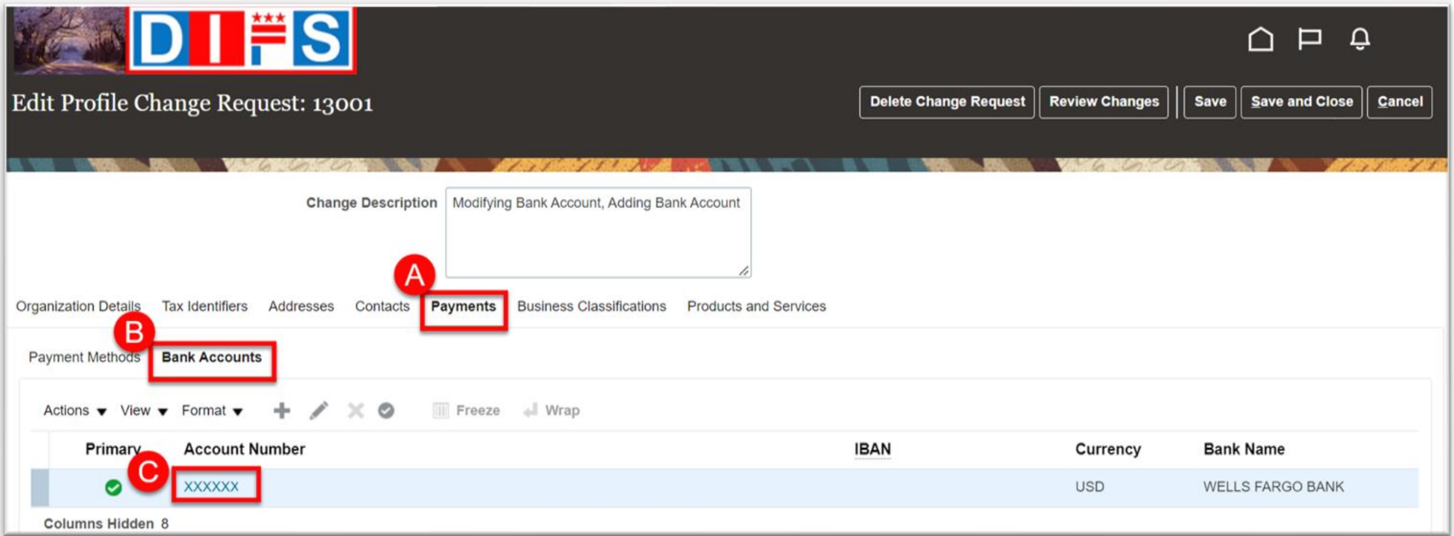
To modify an existing bank account, do the following steps:

A. Click on the **Payments** tab

B. Click on the **Bank Accounts** tab

C. Click on the **Account Number** to modify

Note: If the bank account or bank name is changing, please upload an image of a voided check using steps in Section 14 Attach Documents to Submit – Page 35.



The ***Edit Bank Account*** window opens. Modify the following fields as needed: (screenshot on the next page)

D. Country (required) – Type or select from the drop-down list '*United States*'

E. Account Number (required) – Enter the bank account number

F. Bank Name (required) – Search and select the bank name from the list of values

G. Branch (required) – Search and select the bank branch name from the list of values, based on the bank name selected on step F above

Note: If the Bank and/or the Branch name is not available in the dropdown list, please send an email to Suppliers@dc.gov

H. Inactive On (optional) – Enter an effective end date for the current bank account if entering a new bank account

I. IBAN (not applicable) – The District does not allow for foreign bank accounts. This field is not applicable

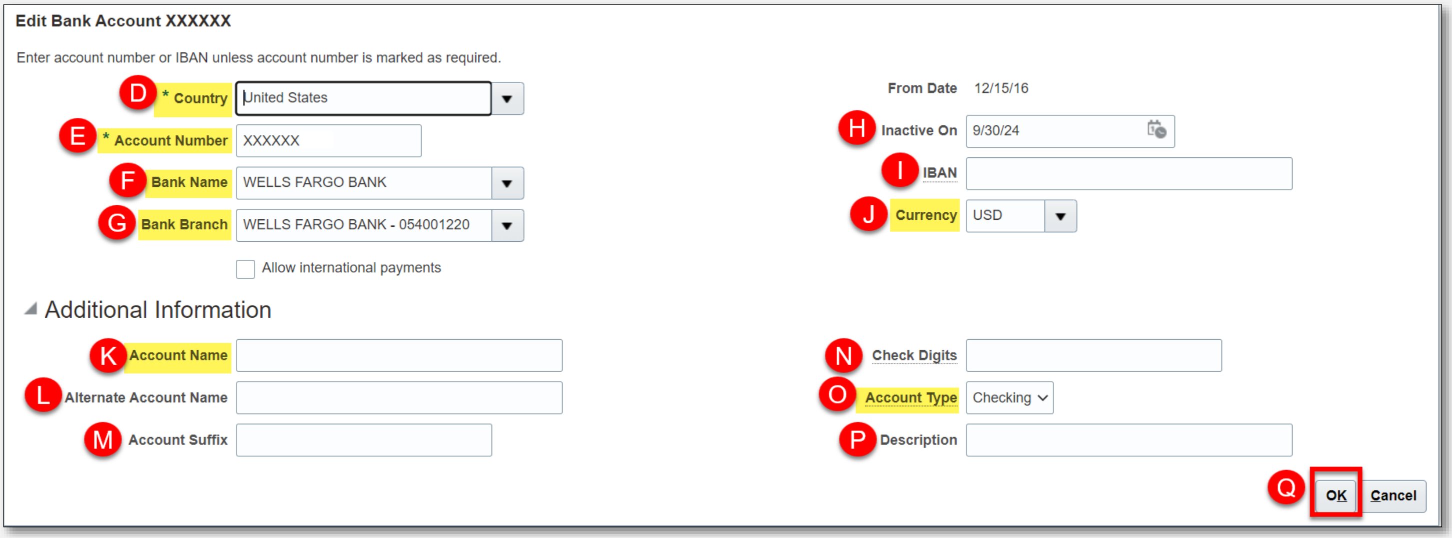
Note: No ACH Direct Deposit payments are being made to foreign bank accounts

10 Modifying an Existing Bank Account (continued)

J. **Currency (required)** – Select 'USD' from the list of values. Payments are only made in USD.

Additional Information section

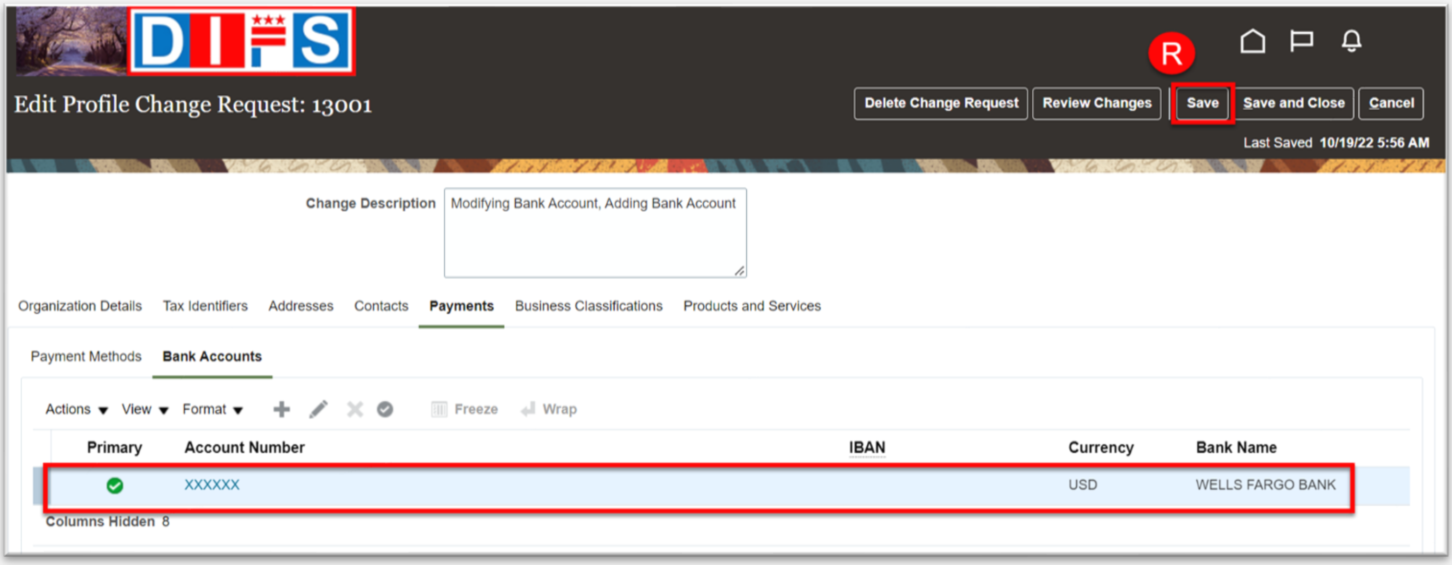
K. **Account Name (required)** – Enter the name of the bank account
L. Alternate Account Name (optional) – If applicable, provide an alternate account name
M. Account Suffix (optional) – If applicable, an account suffix is added to the end of an account number so that numerous account types can be maintained under the same account number
N. Check Digits (optional) – Not applicable in most cases. A check digit is a digit added to a string of numbers for error detection purposes.
O. **Account Type (required)** – Select an option from the drop-down list of values: Checking, Savings, Unknown
P. Description (optional) – Enter a description about the bank account
Q. When finished updating the bank details, click the ***OK*** button



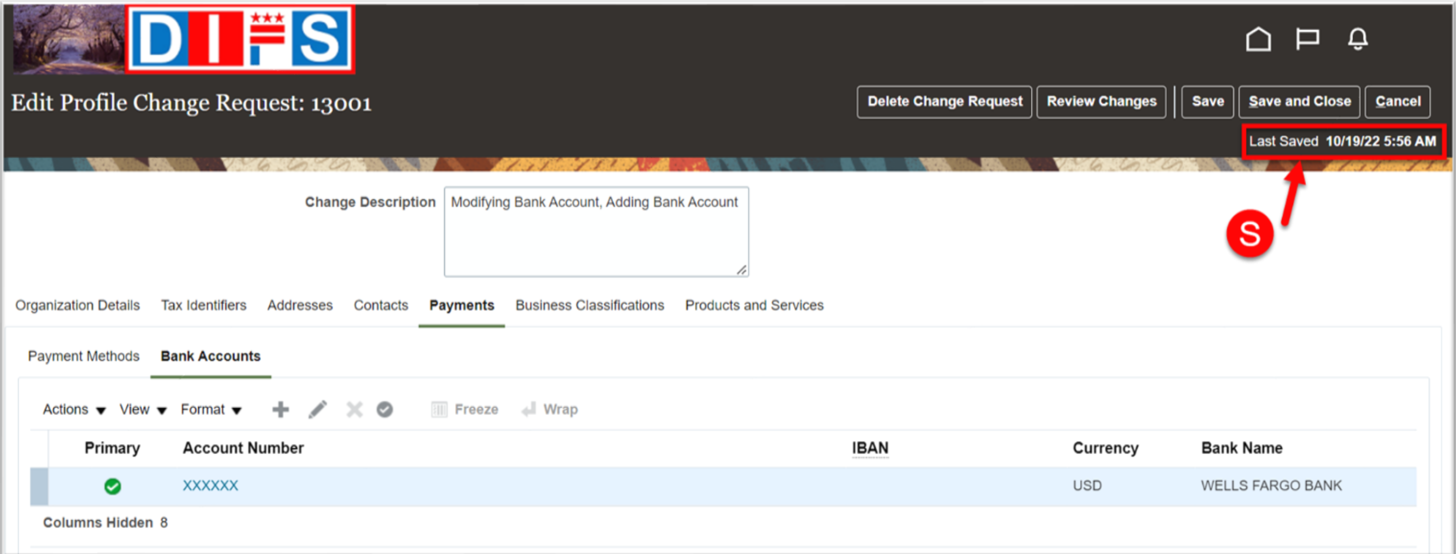
10 Modifying an Existing Bank Account (continued)

The **Edit Profile Change Request** page displays the updated bank account.

R. Click the **Save** button



S. The Saved information will display on the page



11 Updating Payment Information – Adding a New Bank Account

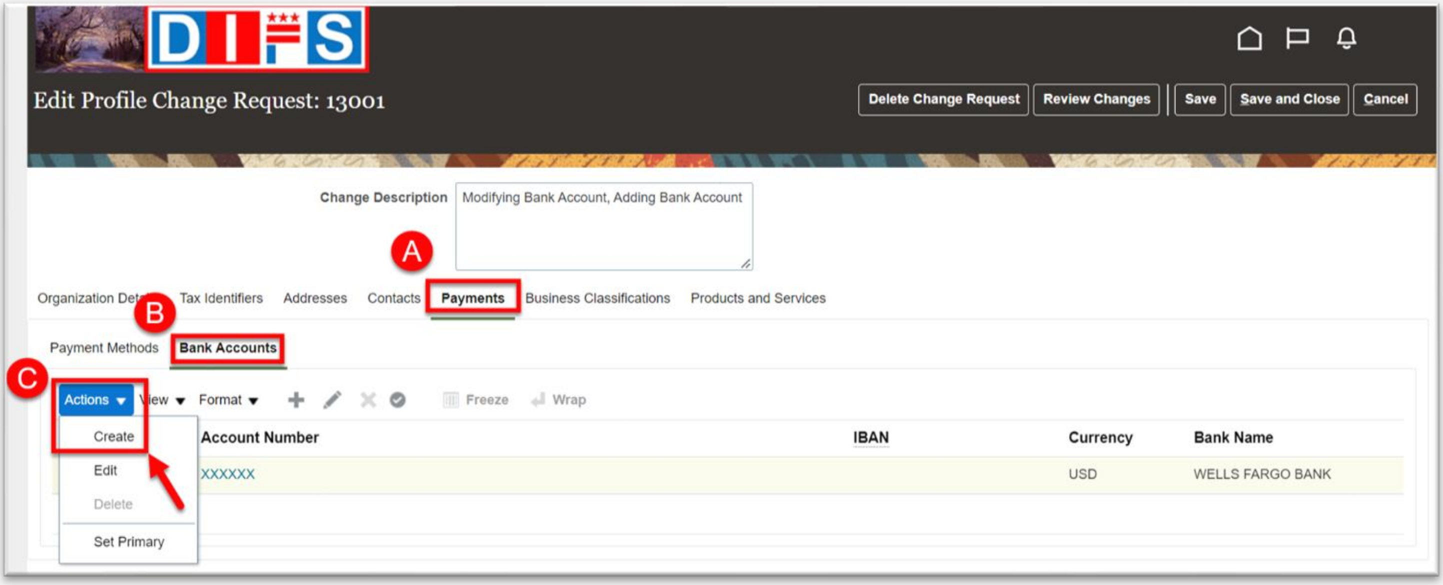
To add a bank account, do the following steps:

A. Click on the **Payments** tab

B. Click on the **Bank Accounts** tab

C. Click on **Actions > Create**

Note: If the bank account or bank name is changing, please upload an image of a voided check using steps in Section 14 Attach Documents to Submit – Page 35.



The ***Create Bank Account*** window opens. Enter the following fields as needed: (screenshot on the next page)

D. Country (required) – Type or select from the drop-down list '*United States*'

E. Account Number (required) – Enter the bank account number

F. Bank Name (required) – Search and select the bank name from the list of values

G. Branch (required) – Search and select the bank branch name from the list of values, based on the bank name selected on step F above

Note: If the Bank and/or the Branch name is not available in the dropdown list, please send an email to Suppliers@dc.gov

H. Inactive On (optional) – Enter an effective end date for the bank account

I. IBAN (not applicable) – The District does not allow for foreign bank accounts. This field is not applicable

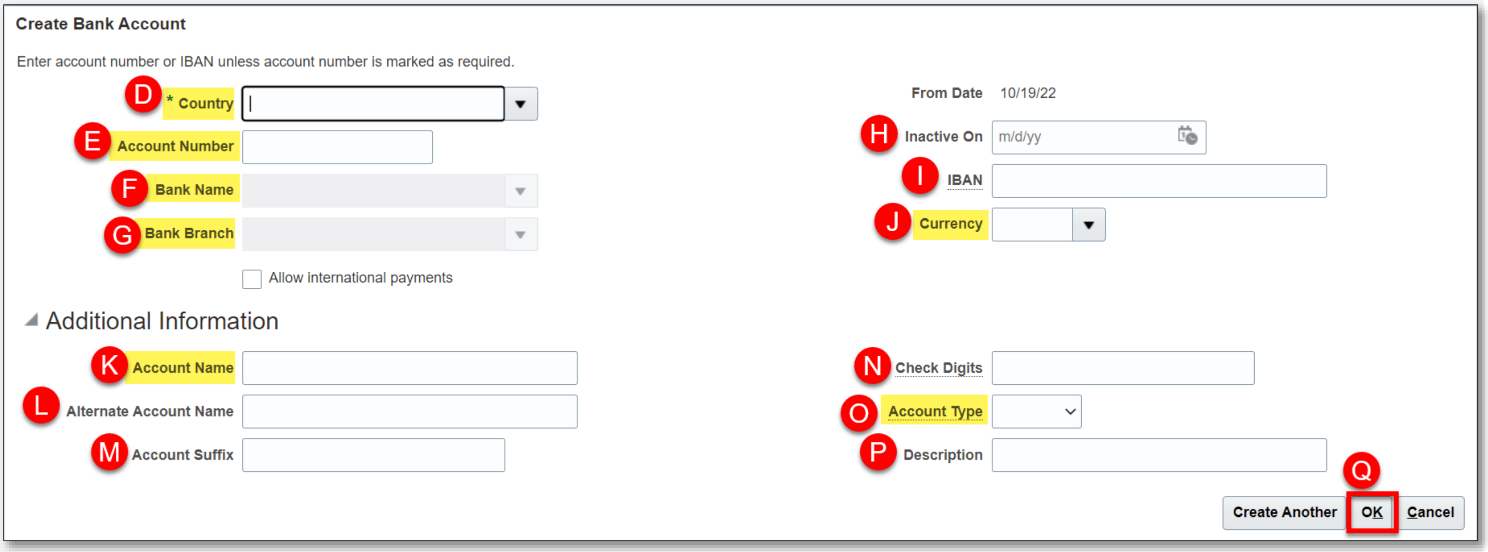
Note: No ACH Direct Deposit payments are being made to foreign bank accounts

11 Adding a New Bank Account (continued)

J. Currency (required) – Select 'USD' from the list of values. Payments are only made in USD.

Additional Information section

K. Account Name (required) – Enter the name of the bank account
L. Alternate Account Name (optional) – If applicable, provide an alternate account name
M. Account Suffix (optional) – If applicable, an account suffix is added to the end of an account number so that numerous account types can be maintained under the same account number
N. Check Digits (optional) – Not applicable in most cases. A check digit is a digit added to a string of numbers for error detection purposes.
O. Account Type (required) – Select an option from the drop-down list of values: Checking, Savings, Unknown
P. Description (optional) – Enter a description about the bank account
Q. When finished updating the bank details, click the ***OK*** button

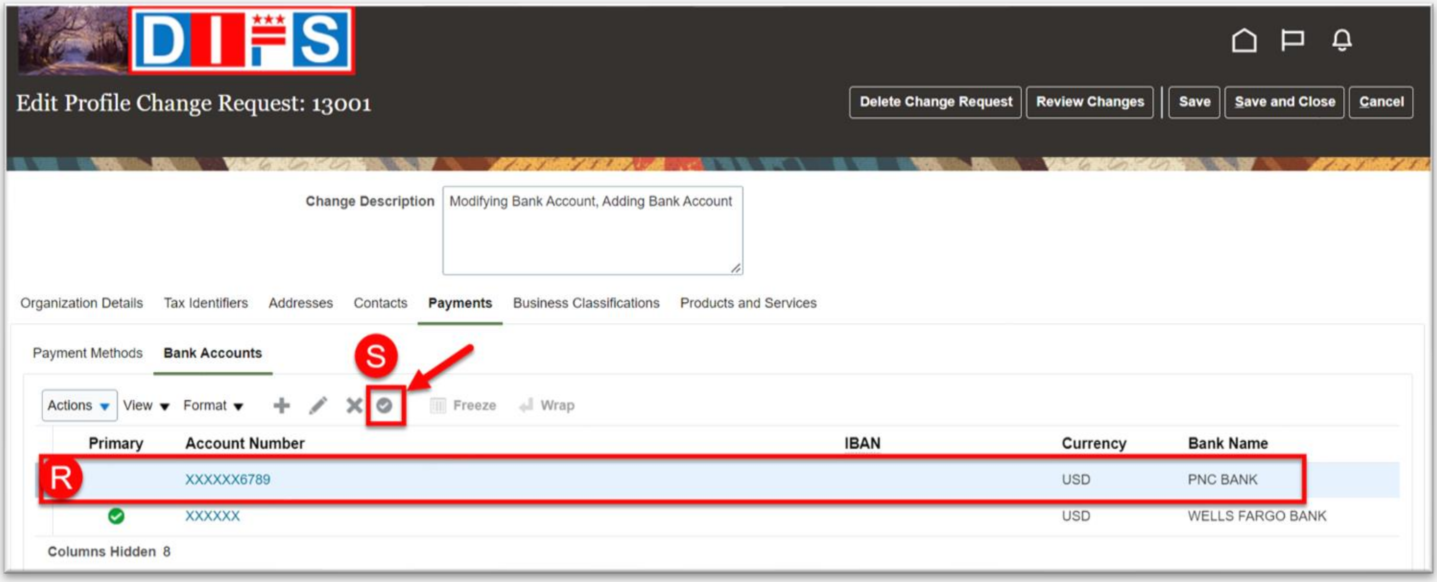


11 Adding a New Bank Account (continued)

The **Edit Profile Change Request** page displays the new bank account.

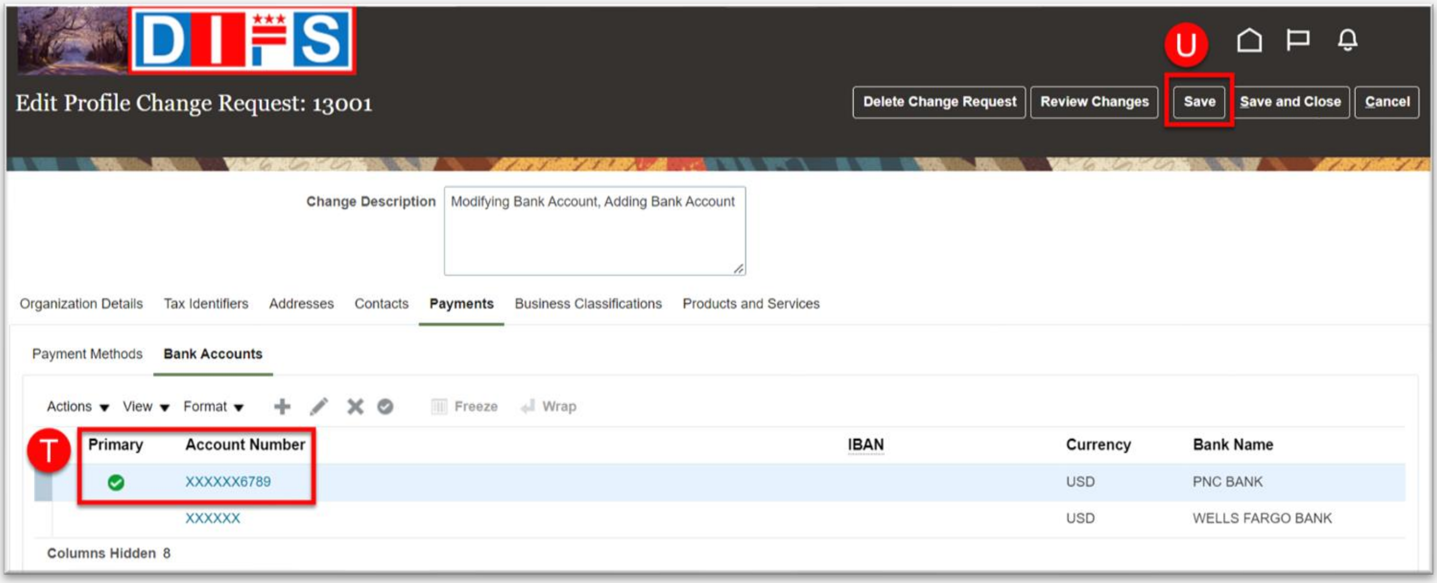
R. To set the new bank account as the **Primary** account, select the bank account

S. Click the checkmark button



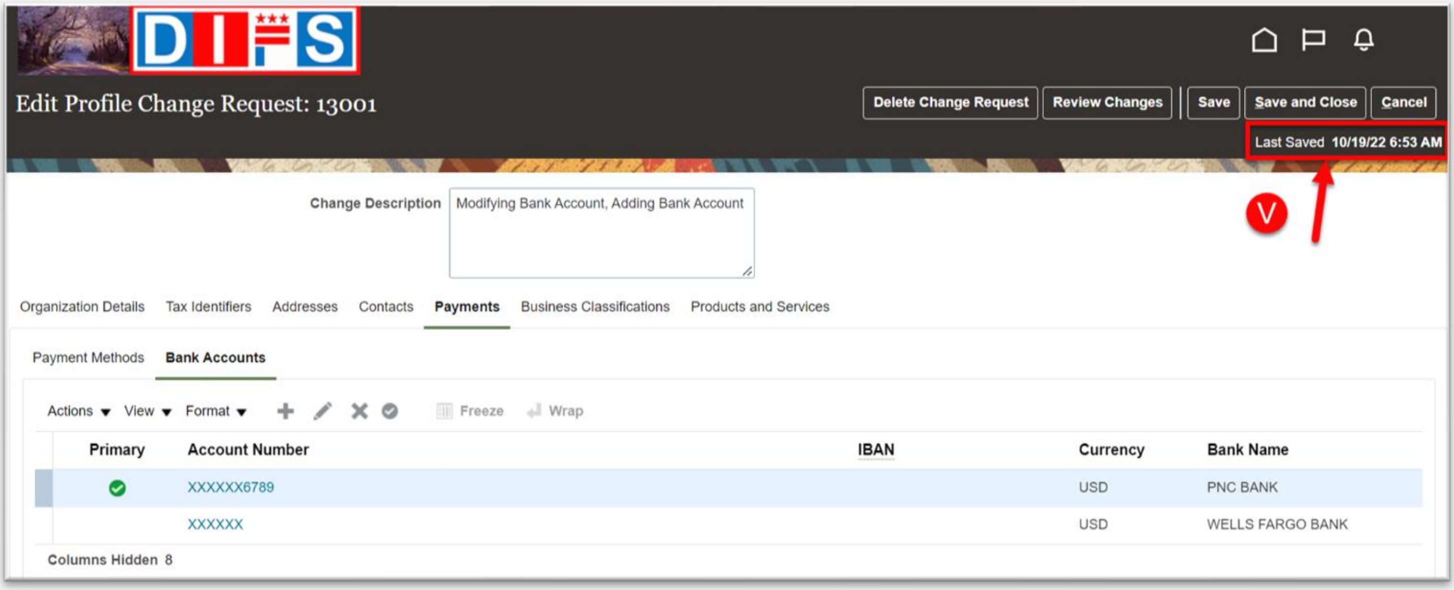
T. The Primary checkmark displays on the new bank account

U. Click the **Save** button



11 Adding a New Bank Account (continued)

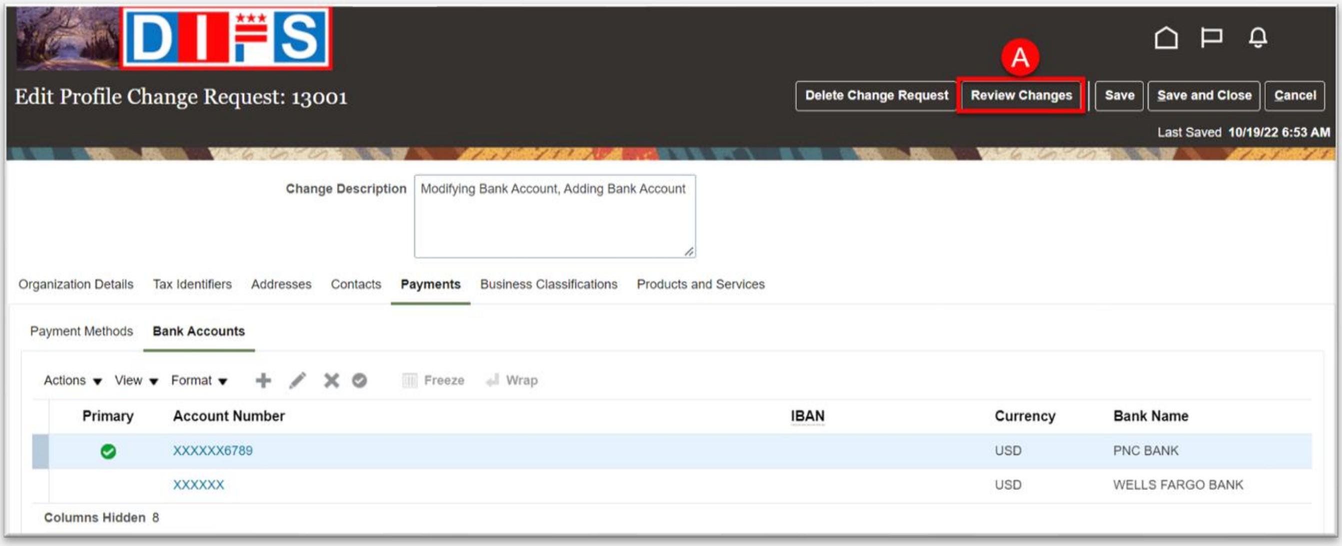
V. The Saved information will display on the page



12 Bank Accounts – Review Changes

After modifying or adding a bank account, review the changes prior to submitting them for approval.

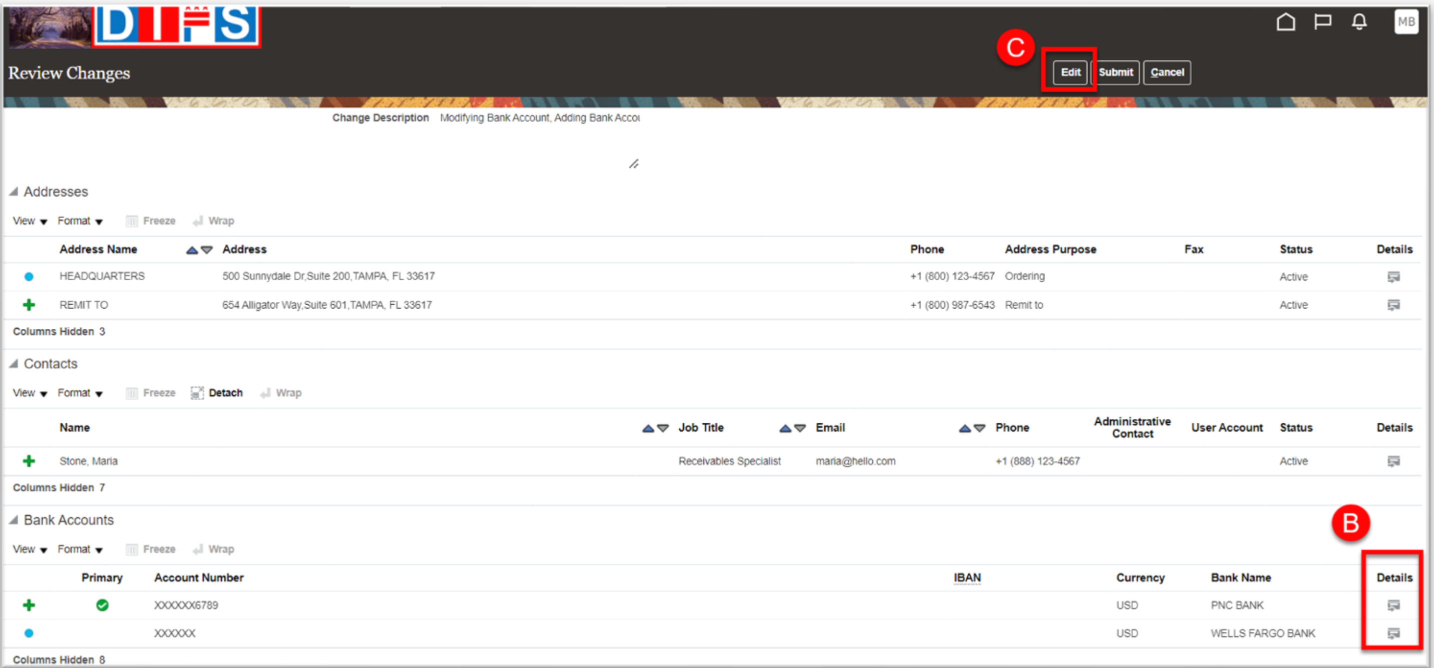
A. Click the **Review Changes** button



The **Review Changes** page displays all the changes made

B. Go to the **Bank Accounts** section, click the **Details** button to review the updates made

C. To make any changes to the bank accounts, click the **Edit** button; otherwise click the **Submit** button



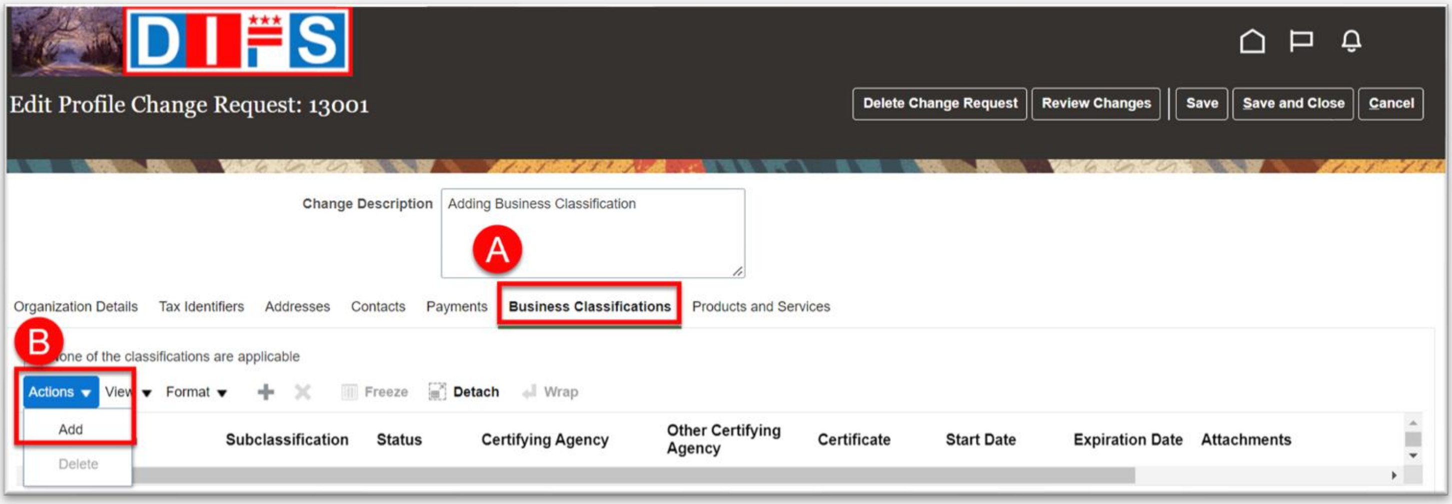
Note: To edit the information, proceed to **Step 10 - Updating Payment Information – Modifying an Existing Bank Account** and follow the steps to modify the bank account.

13 Updating Business Classifications: Adding a Business Classification

Note: If you are a registered PASS (Procurement Automated Source System) Supplier with the Ariba System Network (ASN), please do not update any HEADQUARTER address information, or any other organizational, or business classification through the Supplier Portal. Please contact the Procurement Center of Excellence (PCOE) at dcvendorportal@dc.gov to make those updates to your supplier profile.

To add a business classification, do the following steps:

A. Click on the **Business Classifications** tab
B. Click on **Actions > Add**



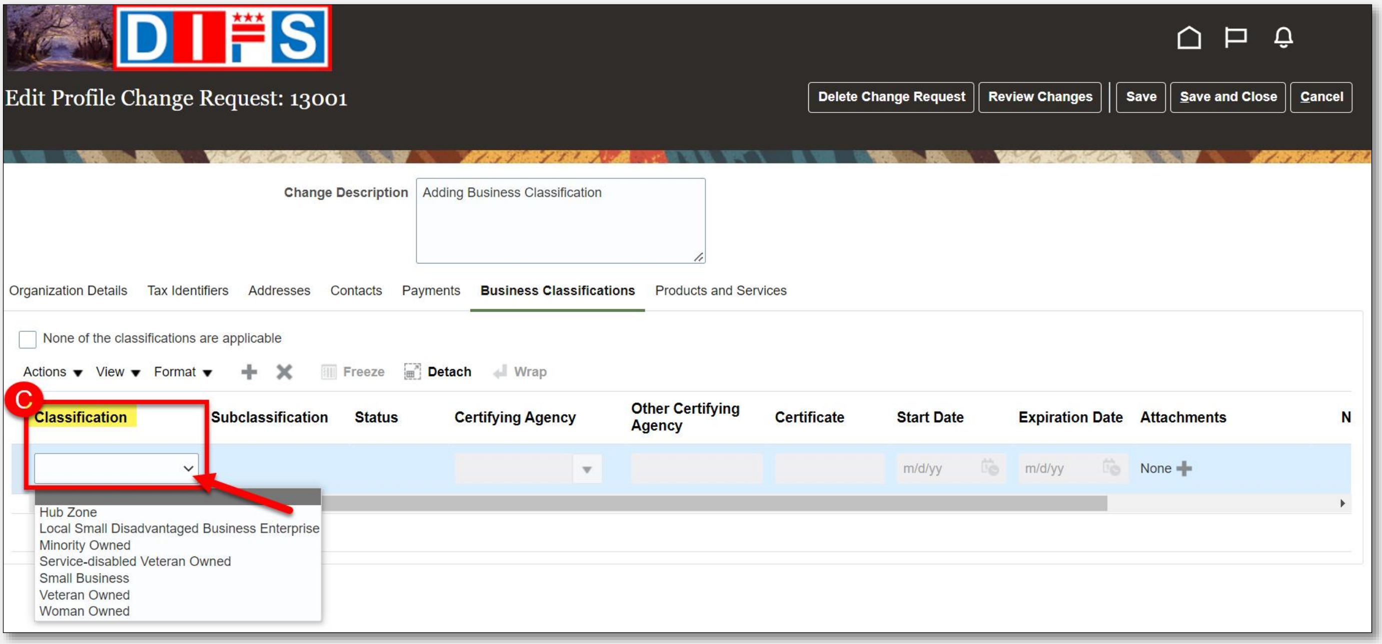
13 Adding a Business Classification (continued)

Note: If claiming a Business Classification, you must submit a certification. See Step 13I for instructions on providing certification information.

C. Select the Classification (required) - Click on the list of values and select one of the following options:

- Hud Zone
- Local Small Disadvantaged Business Enterprise
- Minority Owned
- Service-disabled Veteran Owned
- Small Business
- Veteran Owned
- Woman Owned

Note: Leave the field blank if none of the above apply



13 Adding a Business Classification (continued)

D. Subclassification (optional) – If the Classification of ‘**Minority Owned**’ on Step 14C is selected, this field becomes available. Click on the list of values and select one of the following options:

- African American
- American Indian
- Asian
- Hispanic

E. Certifying Agency (optional) - Click on the list of values and select one of the existing values

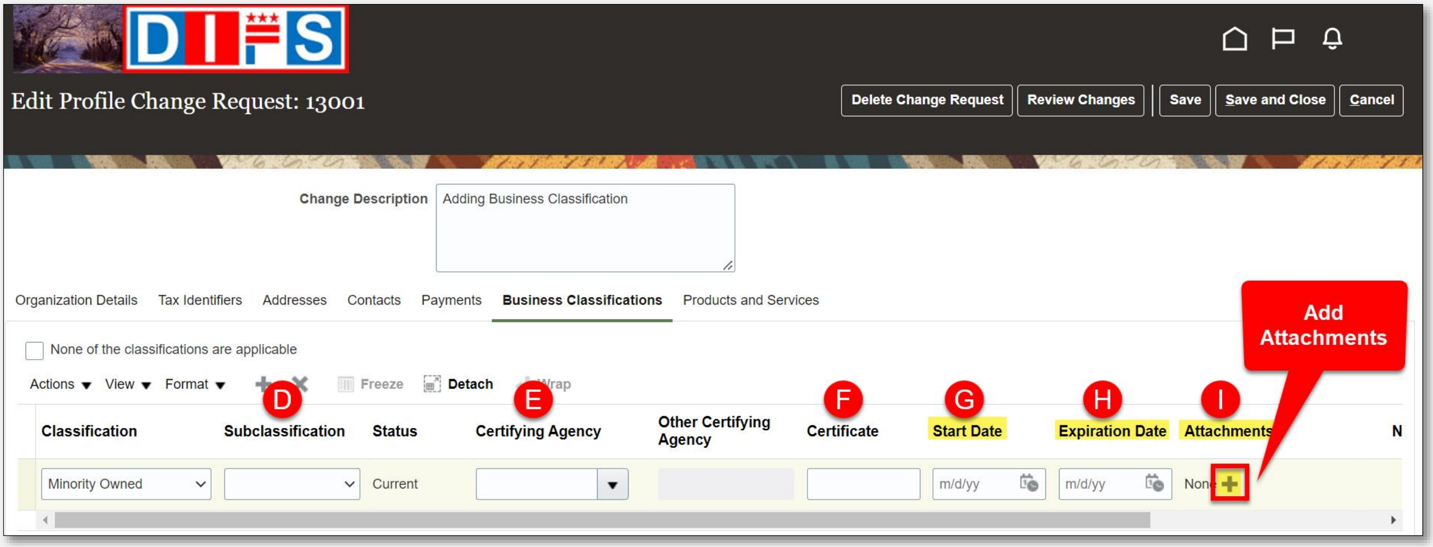
F. Certificate (optional) – Enter the certification number.

Note: Must include certification from DSLBD site, https://dslbd.dc.gov/getcertified, to claim CBE (Certified Business Enterprise) status.

G. Start Date (required) – Enter the certification start date

H. Expiration Date (required) - Enter the certification end date

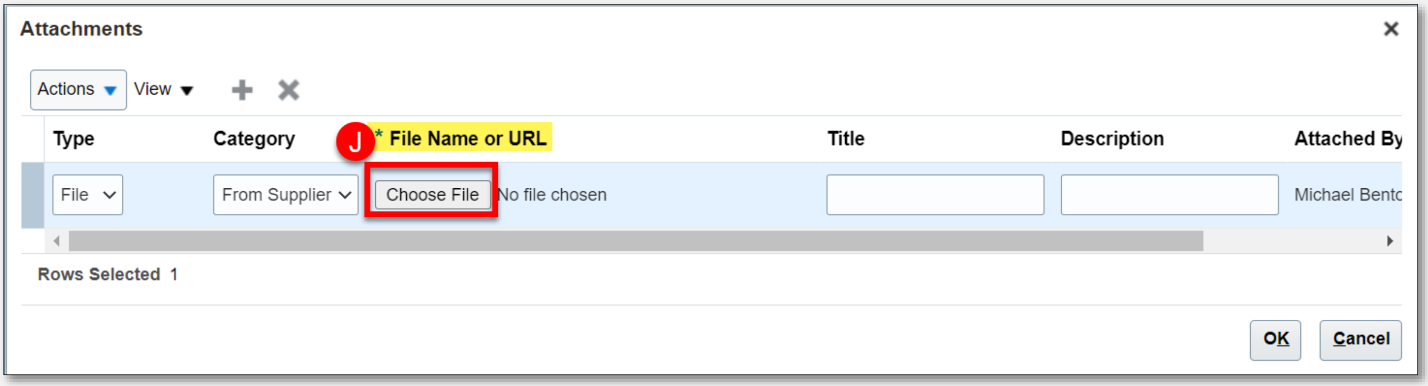
I. Attachments (required) – Upload the Agency certification **by clicking on the + icon**



13 Adding a Business Classification (continued)

The ***Attachments*** window will open

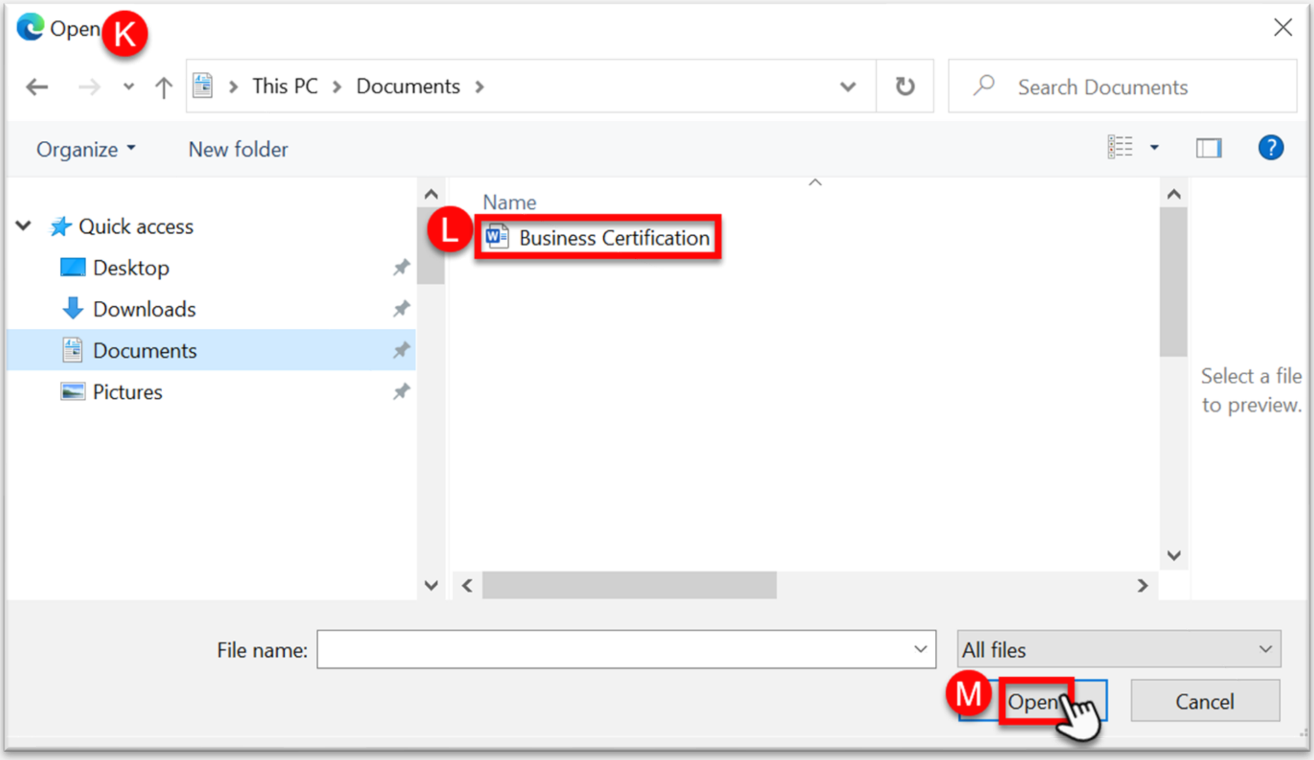
J. File Name or URL (required) - click on the ***Choose File*** button



K. A file window will open on your device

L. Find and select the file to upload. Accepted File types include Word, Excel, PowerPoint, PDF, Zip files, Image files (png, jpg). Maximum file size is 2GB.

M. Click on the ***Open*** button

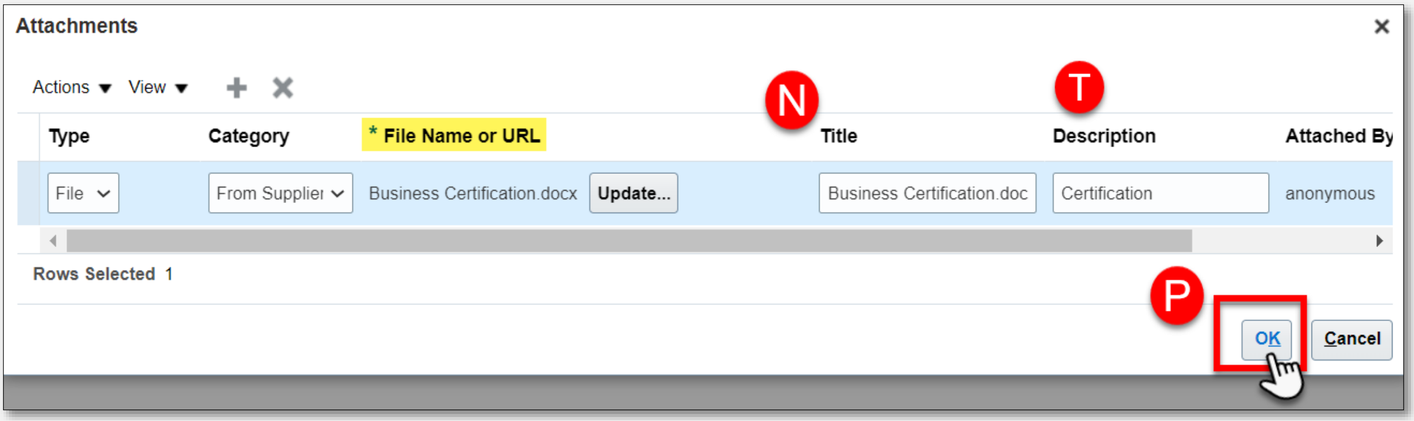


13 Adding a Business Classification (continued)

N. Title (optional) – Defaults from file uploaded on **Step 14L**, the File name can be updated

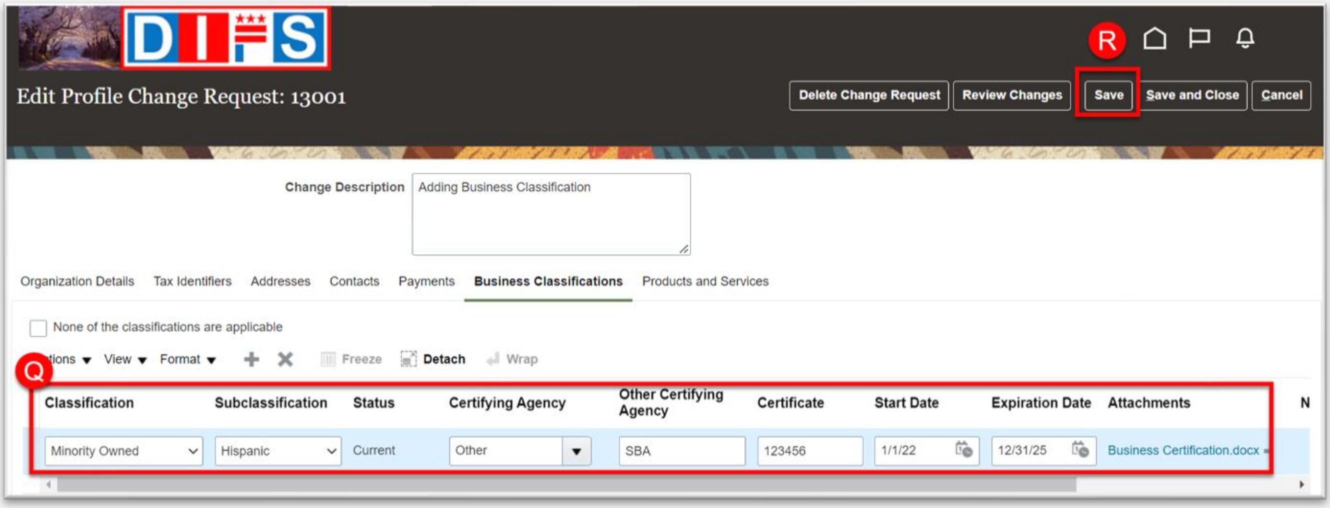
O. Description (optional) – Provide a description of the file

P. Click the ***OK*** button to save the information



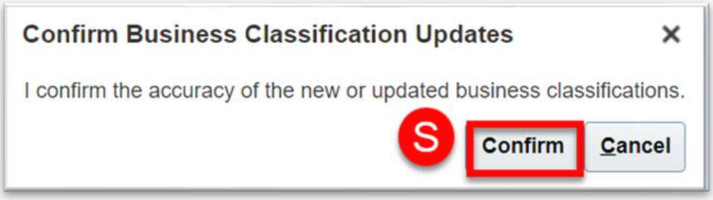
Q. Verify the Classification entered

R. Click the **Save** button



The **Confirm Business Classification Updates** message pop up asking to confirm the accuracy of the new or updated business classifications.

S. Click the **Confirm** button



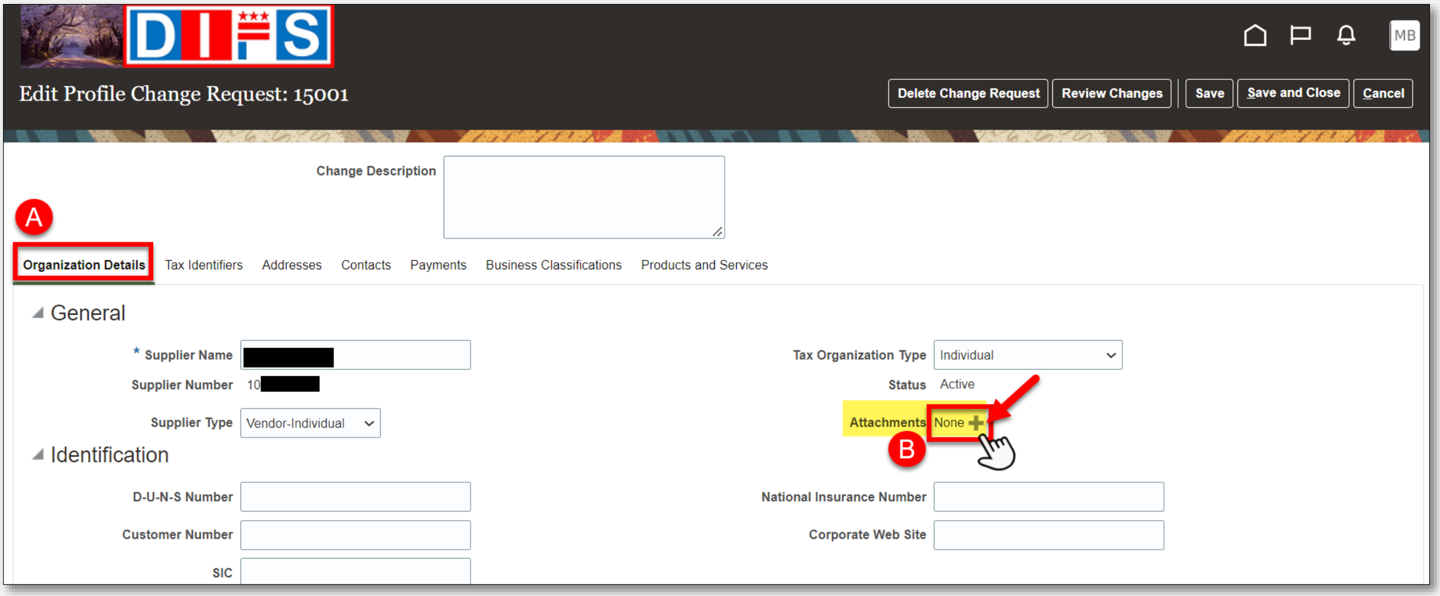
14 Attach Documents to Submit

After modifying or adding information, attach any supporting documentation requested in the sections.

A. Go to the **Organization Details** tab

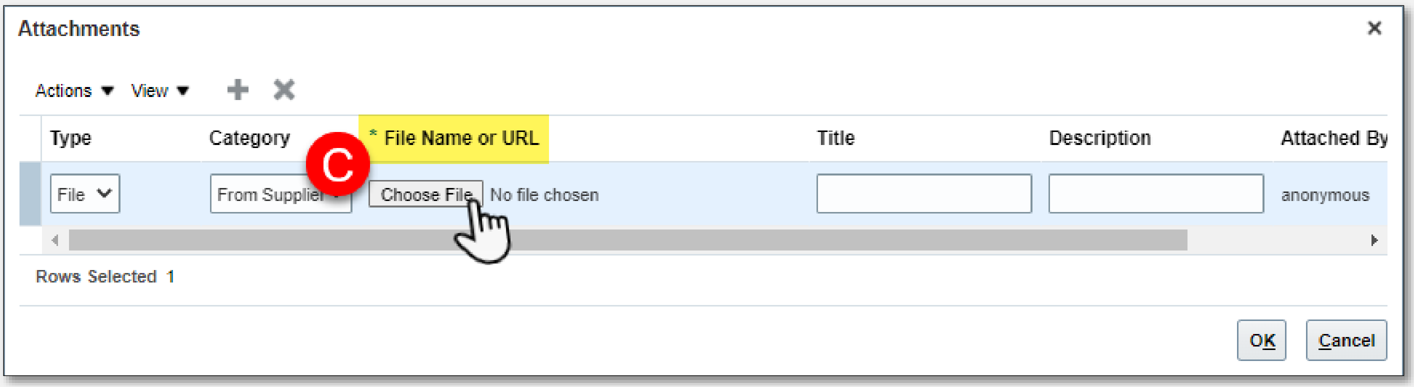
B. Click on the Attachments + button

Note: All attachments, including those required for banking must be attached here.



The ***Attachments*** window will open

C. File Name or URL (required) - click on the ***Choose File*** button

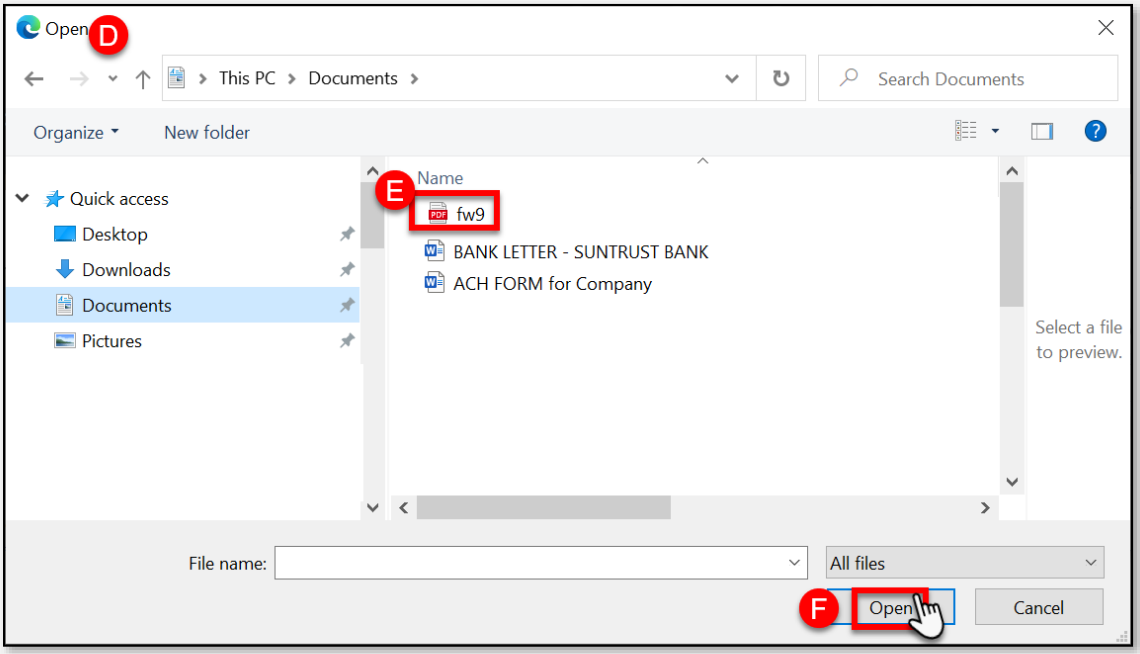


14 Attach Documents to Submit (continued)

D. A file window will open on your computer

E. Find and select the file to upload

F. Click on the ***Open*** button

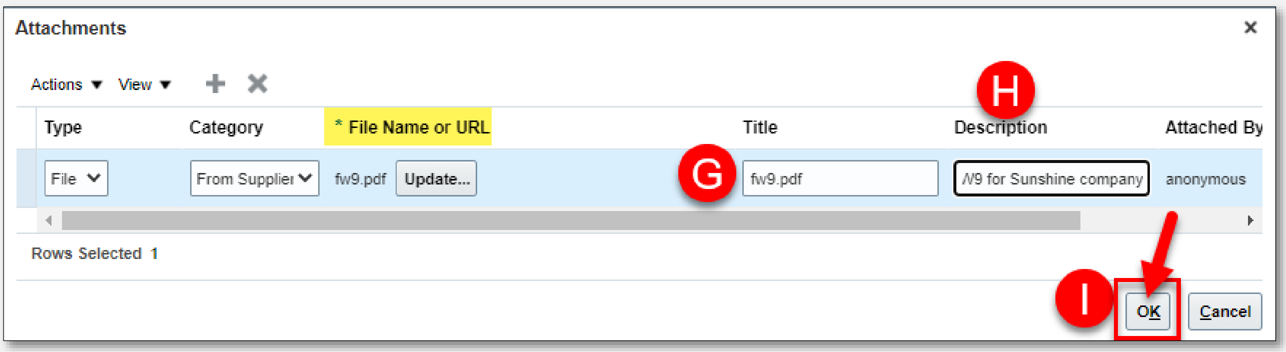


Provide a description of the selected file.

G. Title (optional) – Click on the field, and the information for this field will auto-populate with the file name of the uploaded file

H. Description (optional) – Provide an explanation about the uploaded file

I. Click the ***OK*** button to save the information

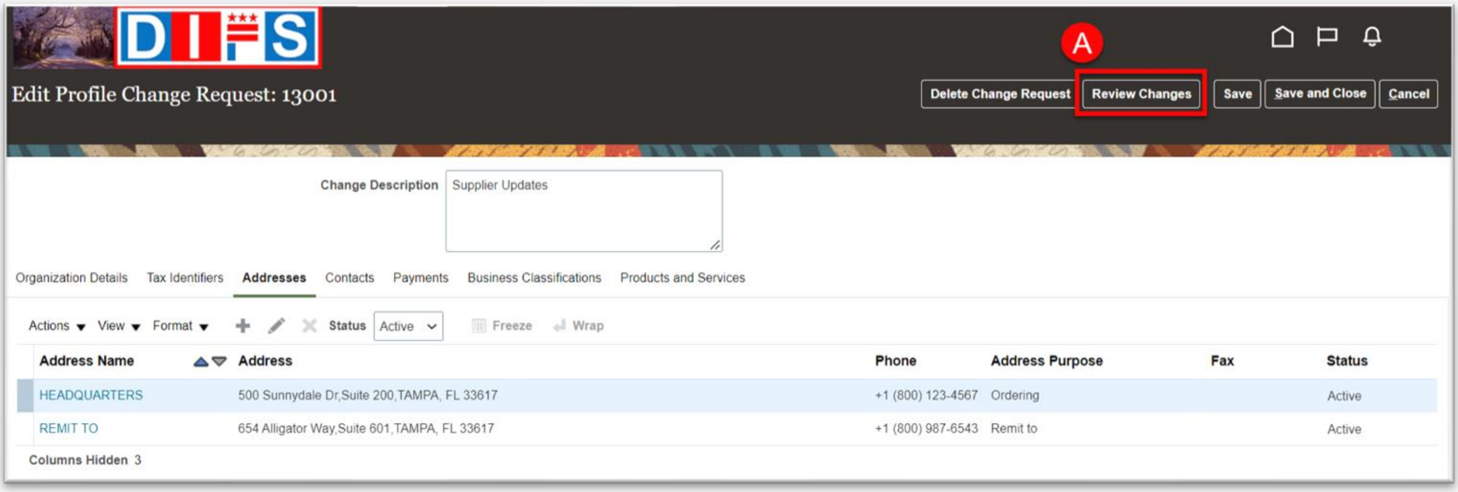


Note: To add additional files, follow the steps in this section. Once all the files are loaded, click the ***OK*** button to save the information.

15 Review and Submit Changes

After modifying or adding information, review the changes prior to submitting them for approval.

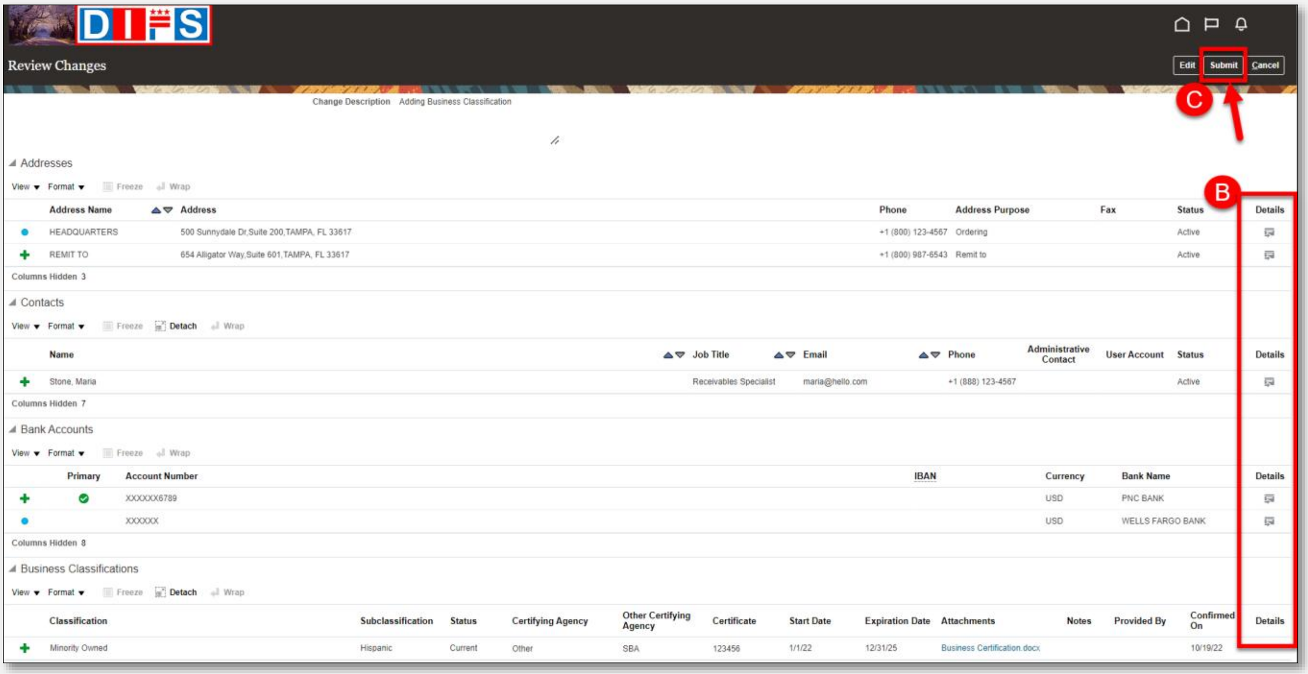
A. Click the **Review Changes** button



The **Review Changes** page displays all the changes made

B. Review each section, click the **Details** button to review the updates made, make any edits necessary.

C. When all the information is complete, click the **Submit** button

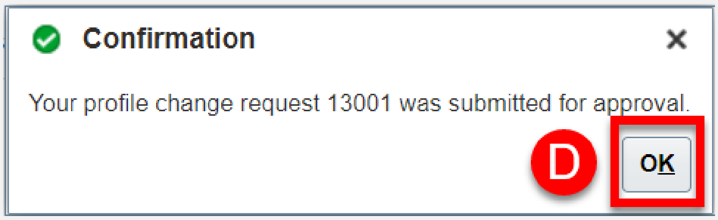


15 Review and Submit Changes (continued)

Confirmation – A confirmation message appears stating:

Your profile change request XXXX was submitted for approval

D. Click the ***OK*** button to close the message

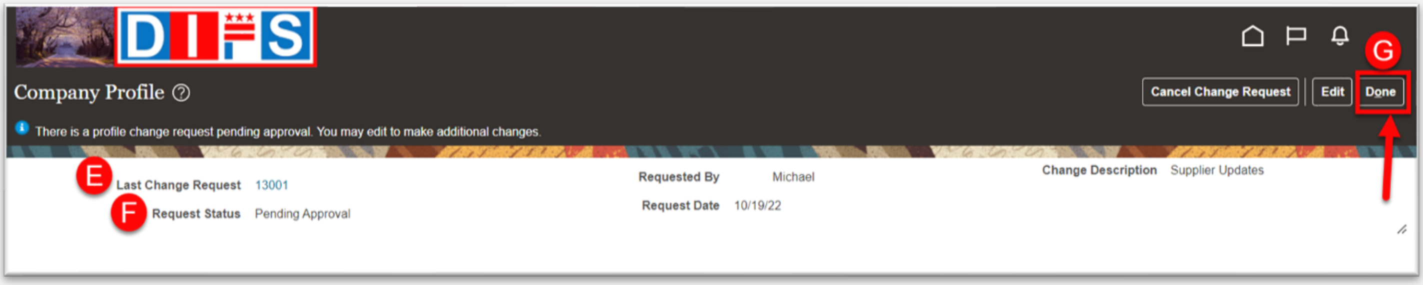


The **Company** Profile page displays

E. The **Last Change Request** field displays the change request number

F. The **Request Status** field displays the status of the change request

G. Click the ***Done*** button



The **Supplier Portal** dashboard page displays

- Close your browser window.
- You will receive an email with additional instructions once your change request has been reviewed and approved.