



# 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](https://cfo.dc.gov/supplier_portal) and click on the **Existing Suppliers** button. For questions, email us at [suppliers@dc.gov](mailto: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](mailto: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:

1. [Log into the Supplier Portal - Page 2](#)
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  - B. [Adding a New Address - Page 9](#)
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  - C. [Contacts: Review Changes - Page 21](#)
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  - B. [Adding a New Bank Account - Page 26](#)
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## 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.

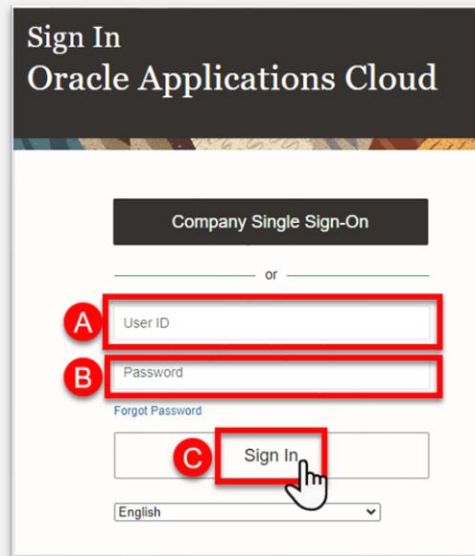
## System Requirements

- **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

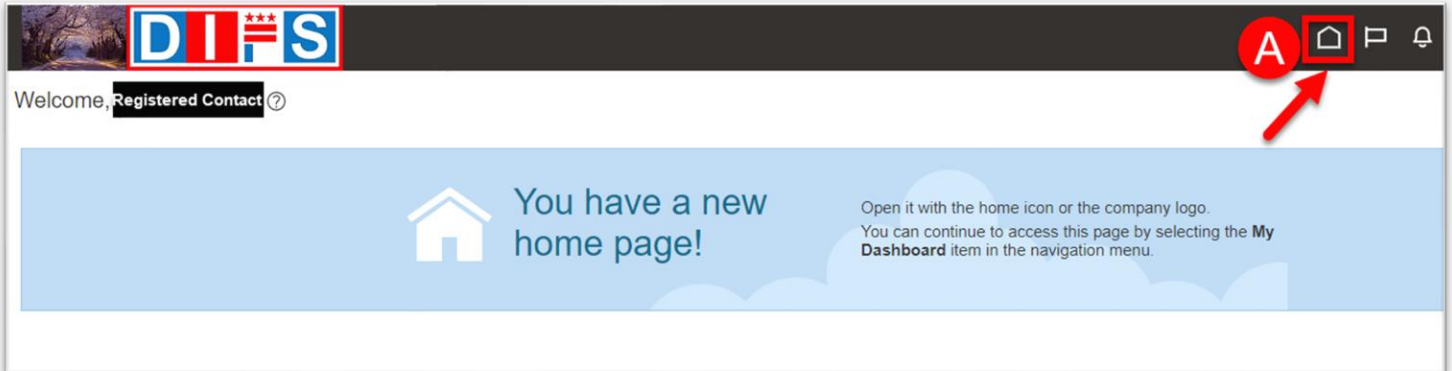
- Go to the Supplier Portal Registration webpage at [https://cfo.dc.gov/supplier\\_portal](https://cfo.dc.gov/supplier_portal) and click on the **Existing Supplier** button.
- The **Sign In Oracle Applications Cloud** page will display
  - A. In the **User ID** field, enter the email address registered with your supplier record
  - B. In the **Password** field, enter your password
  - C. Click the **Sign In** button



## 2 Navigating the Supplier Portal

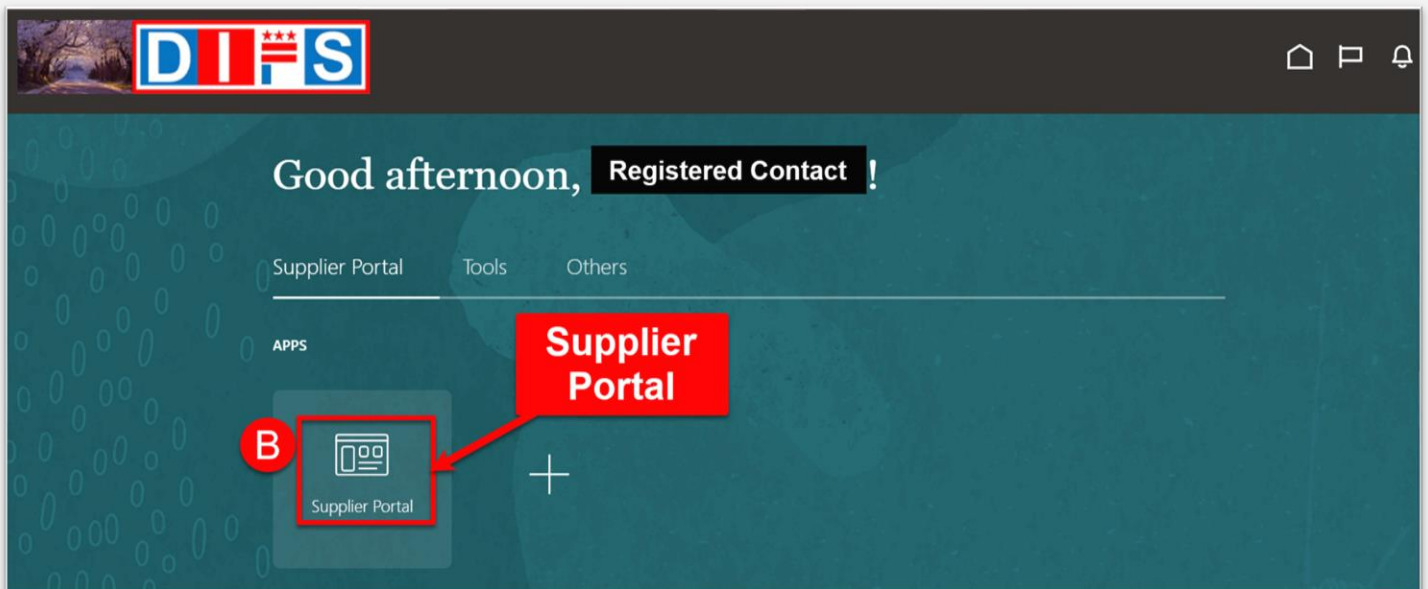
When you first log into the Supplier Portal, a Welcome page displays with your name.

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



The Oracle Dashboard screen displays.

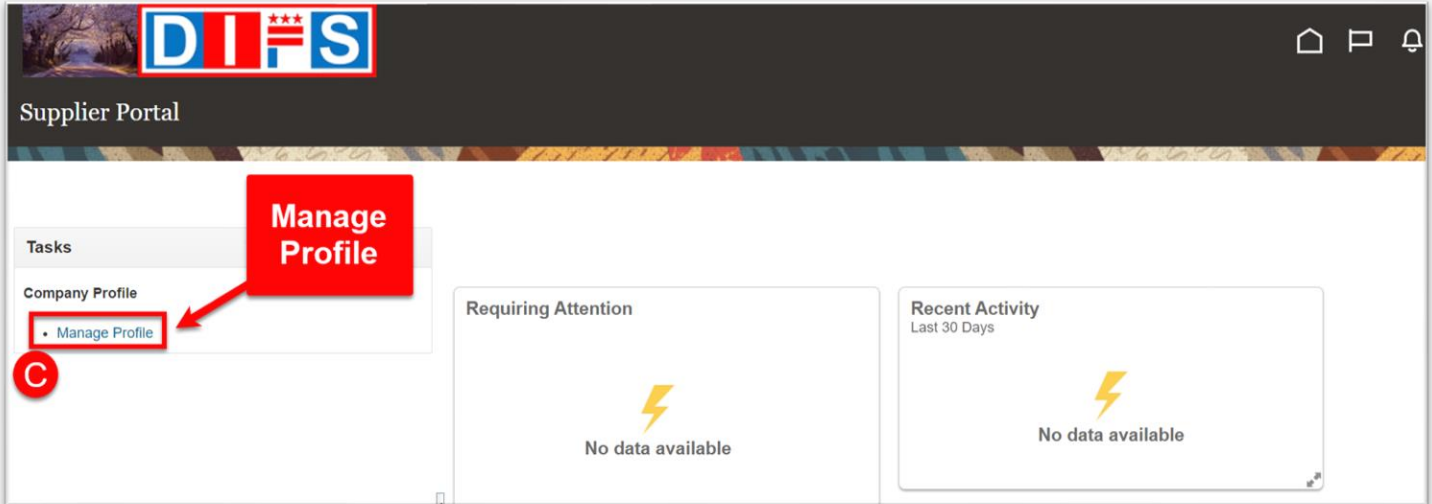
B. Click the **Supplier Portal** link or icon



## 2 Navigating the Supplier Portal (continued)

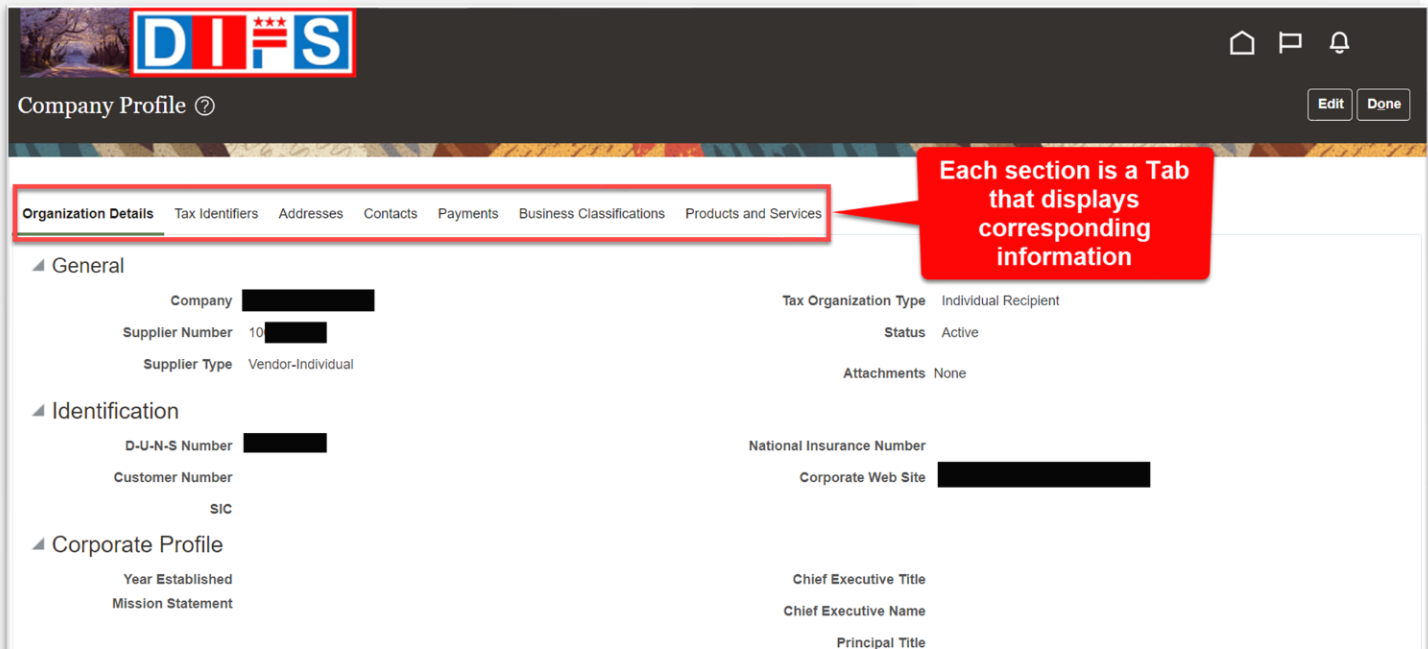
The Supplier Portal screen displays.

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



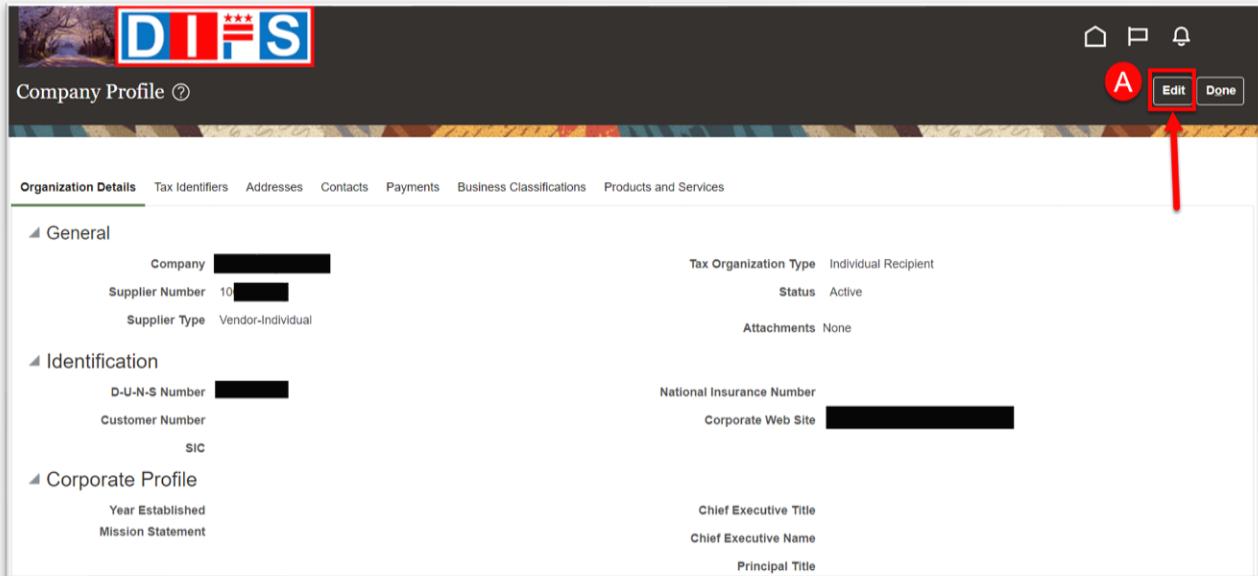
The **Company Profile** page displays and contains the following tabs at the top of the page. Check out each tab and verify the information contained therein. The following pages explain how to modify the information.

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



### 3 Creating a Change Request to Modify Supplier Information

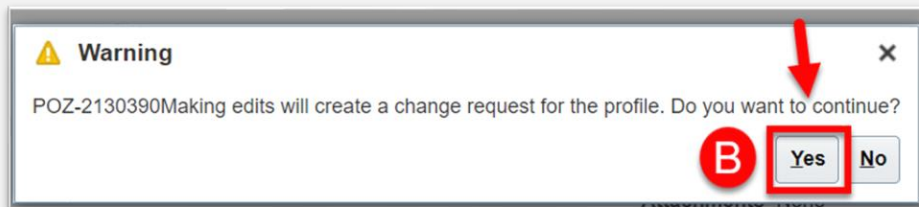
A. To make updates to your supplier information click the **Edit** button



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

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

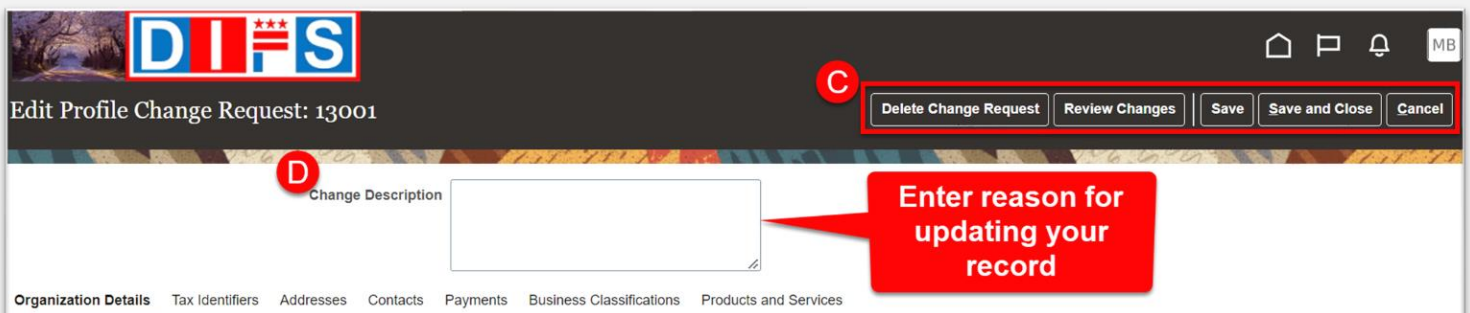
B. Click the **Yes** button



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](mailto: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

**Edit Address: HEADQUARTERS** ✕

<p><b>C</b> * Address Name <input type="text" value="HEADQUARTERS"/></p> <p><b>D</b> * Country <input type="text" value="United States"/></p> <p><b>E</b> Address Line 1 <input type="text" value="1712 Sunset Hills"/></p> <p><b>F</b> Address Line 2 <input type="text"/></p> <p><b>G</b> City <input type="text" value="Tampa"/></p> <p><b>H</b> State <input type="text" value="FL"/></p> <p><b>I</b> Postal Code <input type="text" value="33617"/></p> <p><b>J</b> Language <input type="text"/></p>	<p><b>K</b> * Address Purpose <input checked="" type="checkbox"/> Ordering <input checked="" type="checkbox"/> Remit to <input type="checkbox"/> RFQ or Bidding</p> <p><b>L</b> Phone <input type="text"/></p> <p><b>M</b> Fax <input type="text"/></p> <p><b>N</b> Email <input type="text"/></p> <p><b>O</b> Inactive Date <input type="text" value="m/d/yy"/></p> <p><b>P</b> Status <input type="text" value="Active"/></p>
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**Q**



## 4 Modifying an Existing Address (continued)

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

R. Click the **Save** button

The screenshot shows the 'Edit Profile Change Request' page for request 13001. The 'Change Description' field contains 'Adding Address'. The 'Addresses' tab is selected, showing a table with one entry: 'HEADQUARTERS' at '500 Sunnydale Dr, Suite 200, TAMPA, FL 33617'. The 'Save' button in the top right is highlighted with a red box, and a red circle with the letter 'R' is next to it.

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering; Remit to		Active

S. The Saved information will display on the page

The screenshot shows the same 'Edit Profile Change Request' page after saving. The 'Save' button is now disabled, and a 'Last Saved' timestamp '10/18/22 9:02 PM' is displayed in the top right corner, highlighted with a red box. A red circle with the letter 'S' and an arrow points to this timestamp.

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering; Remit to		Active

## 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](mailto: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 screenshot shows the DIFS Supplier Portal interface. At the top, there is a header with the DIFS logo and navigation icons. Below the header, there is a section for 'Edit Profile Change Request: 13001' with buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. The main content area has a 'Change Description' field containing 'Adding Address'. Below this, there are several tabs: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Addresses' tab is selected and highlighted with a red box and a red letter 'A'. Below the tabs, there is a table with columns for 'Address', 'Phone', 'Address Purpose', 'Fax', and 'Status'. The table contains one row with the address '500 Sunnydale Dr, Suite 200, TAMPA, FL 33617' and phone number '+1 (800) 123-4567'. To the left of the table, there is an 'Actions' dropdown menu with options 'Create', 'Edit', and 'Delete'. The 'Create' option is highlighted with a red box and a red letter 'B'.

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

**Create Address** ✕

**C** \* Address Name

**D** \* Country

**E** Address Line 1

**F** Address Line 2

**G** City

**H** State

**I** Postal Code

**J** Language

**K** \* Address Purpose  Ordering  
 Remit to  
 RFQ or Bidding

**L** Phone

**M** Fax

**N** Email

**O** Inactive Date

**P** Status  Active

**Q**

## 5 Adding a New Address (continued)

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

R. Click the **Save** button

Change Description: Adding Address

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + ✎ ✕ Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr,Suite 200,TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active
REMIT TO	654 Alligator Way,Suite 601,TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active

Columns Hidden 3

S. The Saved information will display on the page

Change Description: Adding Address

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + ✎ ✕ Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr,Suite 200,TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active
REMIT TO	654 Alligator Way,Suite 601,TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active

Columns Hidden 3

Last Saved 10/18/22 10:23 PM

## 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

Change Description: Adding Address

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr,Suite 200,TAMPA, FL 33617	+1 (800) 123-4567	Ordering; Remit to		Active

Columns Hidden 3

B. Click the **Details** button

Change Description: Adding Address

Addresses

View Format Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr,Suite 200,TAMPA, FL 33617	+1 (800) 123-4567	Ordering; Remit to		Active	

Columns Hidden 3

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

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

Address: HEADQUARTERS

View Format Freeze **Detach** Wrap

Attribute	Changed From	Changed To
Address Line 1	[REDACTED]	500 Sunnydale Dr
Address Line 2		Suite 200
City	WASHINGTON	Tampa
State	DC	FL
Postal Code	20011	33617

Done

## 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

Close the window & return to previous screen

Attribute	Changed From	Changed To
Address Line 1	[REDACTED]	500 Sunnydale Dr
Address Line 2		Suite 200
City	WASHINGTON	Tampa
State	DC	FL
Postal Code	20011	33617
Email		helloworld@hello.com
Phone Area Code		800
Phone Country Code		1
Phone		123-4567

The **Address** window displays

F. Click the **Done** button

Address: HEADQUARTERS

Attribute	Changed From	Changed To
Address Line 1	[REDACTED]	500 Sunnydale Dr
Address Line 2		Suite 200
City	WASHINGTON	Tampa
State	DC	FL
Postal Code	20011	33617

Done



## 6 Addresses – Review Changes (continued)

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

Review Changes

Change Description Adding Address

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering; Remit to		Active	

Columns Hidden 3

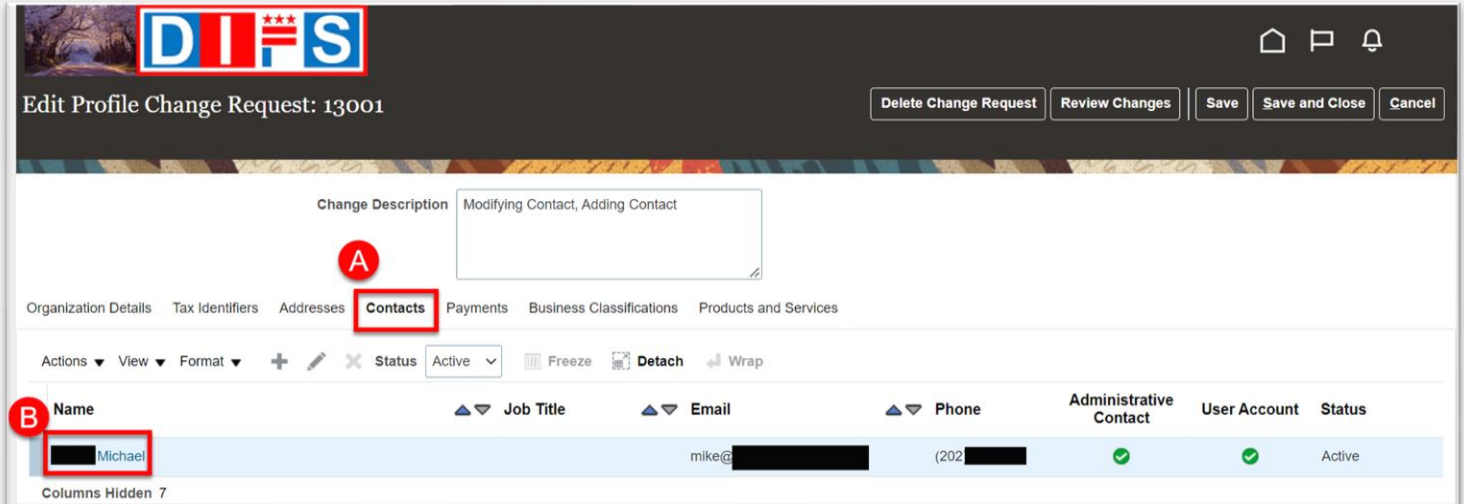


**Note:** To edit the information, proceed to [Step 4 - Updating Address Information: Modifying an Existing Address](#) and follow the steps to modify the address.

## 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



Change Description: Modifying Contact, Adding Contact

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Actions View Format + ✎ ✕ Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Michael		mike@	(202)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active

Columns Hidden 7

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

**Edit Contact: Michael** ✕

**C** Salutation

**D** \* First Name

**E** Middle Name

**F** \* Last Name

**G** Job Title

**H**  Administrative contact

**I** Phone

Mobile

**J** Fax

**K** Email

**L** Status

**M** Account Status

User Name

**N** Role  Description

**O** OK

## 7 Modifying an Existing Contact (continued)

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

P. Click the **Save** button

The screenshot shows the 'Edit Profile Change Request' page for request 13001. The 'Save' button in the top right navigation bar is highlighted with a red box. Below the navigation bar, there is a 'Change Description' field containing 'Modifying Contact, Adding Contact'. A tabbed interface shows 'Contacts' as the active tab. Below the tabs, there are action buttons: 'Status' (set to 'Active'), 'Freeze', 'Detach', and 'Wrap'. A table lists contact information, with the first row highlighted in blue and a red box around it:

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Sunshine, Michael		mike@hello.com	(202)1234567	✓	✓	Active

Columns Hidden 7

Q. The Saved information will display on the page

The screenshot shows the same 'Edit Profile Change Request' page, but now the 'Save' button has been replaced by 'Save and Close' and 'Cancel'. A red box highlights the 'Last Saved 10/18/22 11:21 PM' timestamp in the top right corner, with a red arrow pointing to it. The table below remains the same:

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Sunshine, Michael		mike@hello.com	(202)1234567	✓	✓	Active

Columns Hidden 7

## 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 screenshot shows the DIFS system interface. At the top, there is a header with the DIFS logo and navigation icons. Below the header, there is a section for 'Edit Profile Change Request: 13001' with buttons for 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. The main content area has a 'Change Description' field containing 'Modifying Contact, Adding Contact'. Below this, there are several tabs: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Contacts' tab is selected and highlighted with a red circle 'A'. Below the tabs, there is a table with columns for 'Job Title', 'Email', 'Phone', 'Administrative Contact', 'User Account', and 'Status'. The table contains one row with the following data: Job Title (empty), Email (mike@engagestrategies.us), Phone ((202)2913110), Administrative Contact (checked), User Account (checked), and Status (Active). To the left of the table, there is an 'Actions' menu with options 'Create', 'Edit', and 'Delete'. The 'Create' option is highlighted with a red circle 'B' and a red arrow pointing to it.

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

**Create Contact** ✕

**C** Salutation

**D** \* First Name

**E** Middle Name

**F** \* Last Name

**G** Job Title

**H**  Administrative contact

**I** Phone

**I** Mobile

**J** Fax

**K** Email

**L** Status

**M**  Request user account

**Roles** | **Data Access**

**N** **Role** | **Description**

No data to display.

**O** OK Cancel



## 8 Adding a New Contact (continued)

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

P. Click the **Save** button

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Michael		mike@	(202)	✓	✓	Active
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active

Q. The Saved information will display on the page

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Michael		mike@	(202)	✓	✓	Active
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active

## 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

Change Description: Modifying Contact, Adding Contact

Organization Details | Tax Identifiers | Addresses | **Contacts** | Payments | Business Classifications | Products and Services

Actions | View | Format | + | ✎ | ✕ | Status: Active | Freeze | Detach | Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Michael		mike@	(202)	✓	✓	Active
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active

Columns Hidden 7

B. Go to the **Contacts** section

C. Click the **Details** button

Change Description: Modifying Contact, Adding Contact

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active	
REMIT TO	654 Alligator Way, Suite 601, TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active	

Columns Hidden 3

**Contacts**

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active	

Columns Hidden 7

## 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

Contact: Maria Stone

Salutation Ms.	Phone 1 888 123-4567
First Name Maria	Mobile
Middle Name	Fax
Last Name Stone	Email maria@hello.com
Job Title Receivables Specialist	Status Active
— Administrative contact	

▲ Contact Addresses

View ▼ Format ▼ Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				
Columns Hidden 5				

▲ User Account

Request user account

Roles Data Access

Role	Description
DIFS Supplier Portal Self Service JR	Provides access to access supplier portal overview and manage supplier profile. --PRODUCTION ROLE, DO NOT E...

D
Done

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

E
Edit
Submit
Cancel

Change Description Modifying Contact, Adding Contact

▲ Addresses

View ▼ Format ▼ Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active	
REMIT TO	654 Alligator Way, Suite 601, TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active	

Columns Hidden 3

▲ Contacts

View ▼ Format ▼ Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active	

Columns Hidden 7



**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 screenshot shows the 'Edit Profile Change Request' window for request 13001. The 'Change Description' is 'Modifying Bank Account, Adding Bank Account'. The 'Payments' tab is selected, and the 'Bank Accounts' sub-tab is active. A table lists bank accounts with columns for Primary, Account Number, IBAN, Currency, and Bank Name. The 'Account Number' field in the first row is highlighted with a red box and labeled 'C'. The 'Payments' tab is labeled 'A' and the 'Bank Accounts' sub-tab is labeled 'B'.

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXXXX		USD	WELLS FARGO BANK

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](mailto: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

**Edit Bank Account XXXXXX**

Enter account number or IBAN unless account number is marked as required.

<p><b>D</b> * Country <input type="text" value="United States"/></p> <p><b>E</b> * Account Number <input type="text" value="XXXXXX"/></p> <p><b>F</b> Bank Name <input type="text" value="WELLS FARGO BANK"/></p> <p><b>G</b> Bank Branch <input type="text" value="WELLS FARGO BANK - 054001220"/></p> <p><input type="checkbox"/> Allow international payments</p> <p>▲ Additional Information</p> <p><b>K</b> Account Name <input type="text"/></p> <p><b>L</b> Alternate Account Name <input type="text"/></p> <p><b>M</b> Account Suffix <input type="text"/></p>	<p>From Date 12/15/16</p> <p><b>H</b> Inactive On <input type="text" value="9/30/24"/></p> <p><b>I</b> IBAN <input type="text"/></p> <p><b>J</b> Currency <input type="text" value="USD"/></p> <p><b>N</b> Check Digits <input type="text"/></p> <p><b>O</b> Account Type <input type="text" value="Checking"/></p> <p><b>P</b> Description <input type="text"/></p>
--	--

**Q** OK Cancel

## 10 Modifying an Existing Bank Account (continued)

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

R. Click the **Save** button

The screenshot shows the 'Edit Profile Change Request' page for request 13001. The 'Save' button is highlighted with a red box. The page includes a navigation menu with 'Payments' selected, and a table of bank accounts. The table has columns for Primary, Account Number, IBAN, Currency, and Bank Name. A row is highlighted with a red box, showing a green checkmark in the Primary column, 'XXXXXX' in the Account Number column, and 'WELLS FARGO BANK' in the Bank Name column.

Primary	Account Number	IBAN	Currency	Bank Name
✓	XXXXXX		USD	WELLS FARGO BANK

S. The Saved information will display on the page

The screenshot shows the 'Edit Profile Change Request' page for request 13001 after the 'Save' button was clicked. The 'Last Saved' timestamp '10/19/22 5:56 AM' is highlighted with a red box. A red circle with the letter 'S' and an arrow points to the 'Last Saved' text. The table of bank accounts remains the same as in the previous screenshot.

Primary	Account Number	IBAN	Currency	Bank Name
✓	XXXXXX		USD	WELLS FARGO BANK



## 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](mailto: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

**Create Bank Account**

Enter account number or IBAN unless account number is marked as required.

<b>D</b> * Country <input type="text"/>	From Date 10/19/22
<b>E</b> Account Number <input type="text"/>	<b>H</b> Inactive On <input type="text"/>
<b>F</b> Bank Name <input type="text"/>	<b>I</b> IBAN <input type="text"/>
<b>G</b> Bank Branch <input type="text"/>	<b>J</b> Currency <input type="text"/>
<input type="checkbox"/> Allow international payments	

Additional Information

<b>K</b> Account Name <input type="text"/>	<b>N</b> Check Digits <input type="text"/>
<b>L</b> Alternate Account Name <input type="text"/>	<b>O</b> Account Type <input type="text"/>
<b>M</b> Account Suffix <input type="text"/>	<b>P</b> Description <input type="text"/>

**Q**

## 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

Change Description: Modifying Bank Account, Adding Bank Account

Organization Details | Tax Identifiers | Addresses | Contacts | **Payments** | Business Classifications | Products and Services

Payment Methods | **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXXXX6789		USD	PNC BANK
<input type="checkbox"/>	XXXXXX		USD	WELLS FARGO BANK

Columns Hidden: 8

T. The Primary checkmark displays on the new bank account

U. Click the **Save** button

Change Description: Modifying Bank Account, Adding Bank Account

Organization Details | Tax Identifiers | Addresses | Contacts | **Payments** | Business Classifications | Products and Services

Payment Methods | **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXXXX6789		USD	PNC BANK
<input type="checkbox"/>	XXXXXX		USD	WELLS FARGO BANK

Columns Hidden: 8

## 11 Adding a New Bank Account (continued)

V. The Saved information will display on the page

The screenshot shows the 'Edit Profile Change Request' page for request 13001. The page includes a navigation bar with the DIFS logo and several buttons: 'Delete Change Request', 'Review Changes', 'Save', 'Save and Close', and 'Cancel'. A 'Last Saved' notification in the top right corner indicates the request was saved on 10/19/22 at 6:53 AM, with a red checkmark icon and an arrow pointing to it. Below the navigation bar, there is a 'Change Description' field containing the text 'Modifying Bank Account, Adding Bank Account'. The main content area is divided into tabs: 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Payments' tab is active, showing a sub-section for 'Bank Accounts'. A table below the sub-section lists the bank accounts with columns for 'Primary', 'Account Number', 'IBAN', 'Currency', and 'Bank Name'. The first row is highlighted in blue and has a green checkmark in the 'Primary' column. The second row is also highlighted in blue. The table data is as follows:

Primary	Account Number	IBAN	Currency	Bank Name
<input checked="" type="checkbox"/>	XXXXXX6789		USD	PNC BANK
<input type="checkbox"/>	XXXXXX		USD	WELLS FARGO BANK

Columns Hidden 8

## 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

Change Description: Modifying Bank Account, Adding Bank Account

Organization Details | Tax Identifiers | Addresses | Contacts | **Payments** | Business Classifications | Products and Services

Payment Methods: **Bank Accounts**

Primary	Account Number	IBAN	Currency	Bank Name
✓	XXXXXX6789		USD	PNC BANK
	XXXXXX		USD	WELLS FARGO BANK

Columns Hidden: 8

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

Review Changes

Change Description: Modifying Bank Account, Adding Bank Account

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active	
REMIT TO	654 Alligator Way, Suite 601, TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active	

Columns Hidden: 3

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active	

Columns Hidden: 7

Bank Accounts

Primary	Account Number	IBAN	Currency	Bank Name	Details
+	XXXXXX6789		USD	PNC BANK	
•	XXXXXX		USD	WELLS FARGO BANK	

Columns Hidden: 8



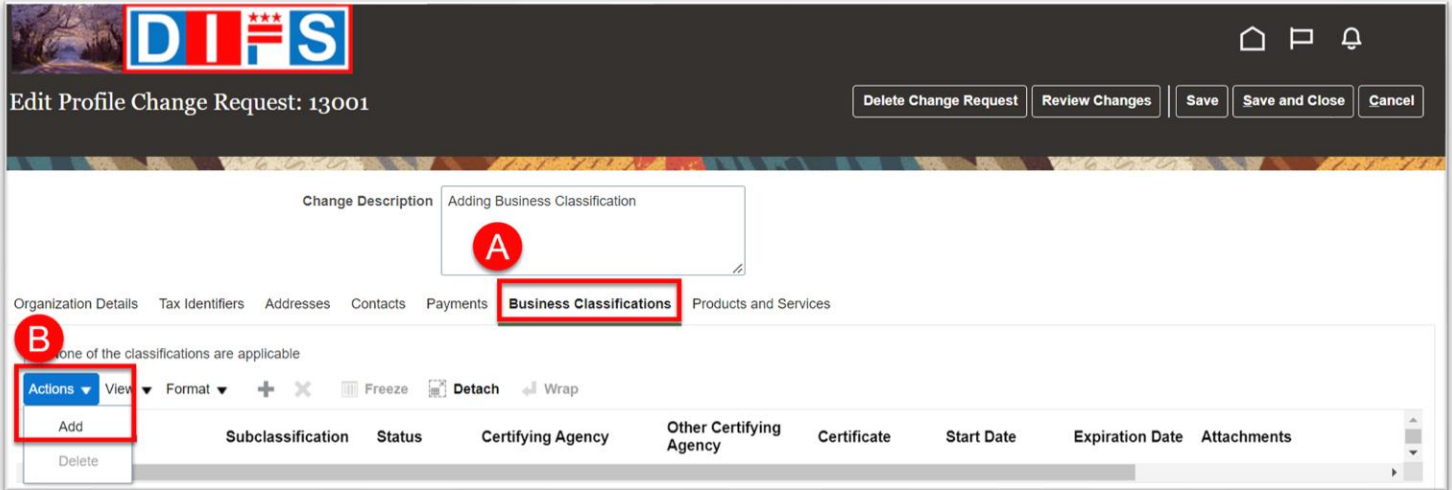
**Note:** To edit the information, proceed to [Step 10 - Updating Payment Information – Modifying an Existing Bank Account](#) and follow the steps to modify the bank account.

## 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](mailto: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

Change Description: Adding Business Classification

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** Products and Services

None of the classifications are applicable

Actions View Format + X Freeze Detach Wrap

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	N
<div style="border: 1px solid black; padding: 2px;"> <ul style="list-style-type: none"> <li>Hub Zone</li> <li>Local Small Disadvantaged Business Enterprise</li> <li>Minority Owned</li> <li>Service-disabled Veteran Owned</li> <li>Small Business</li> <li>Veteran Owned</li> <li>Woman Owned</li> </ul> </div>						m/d/yy	m/d/yy	None +	

## 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

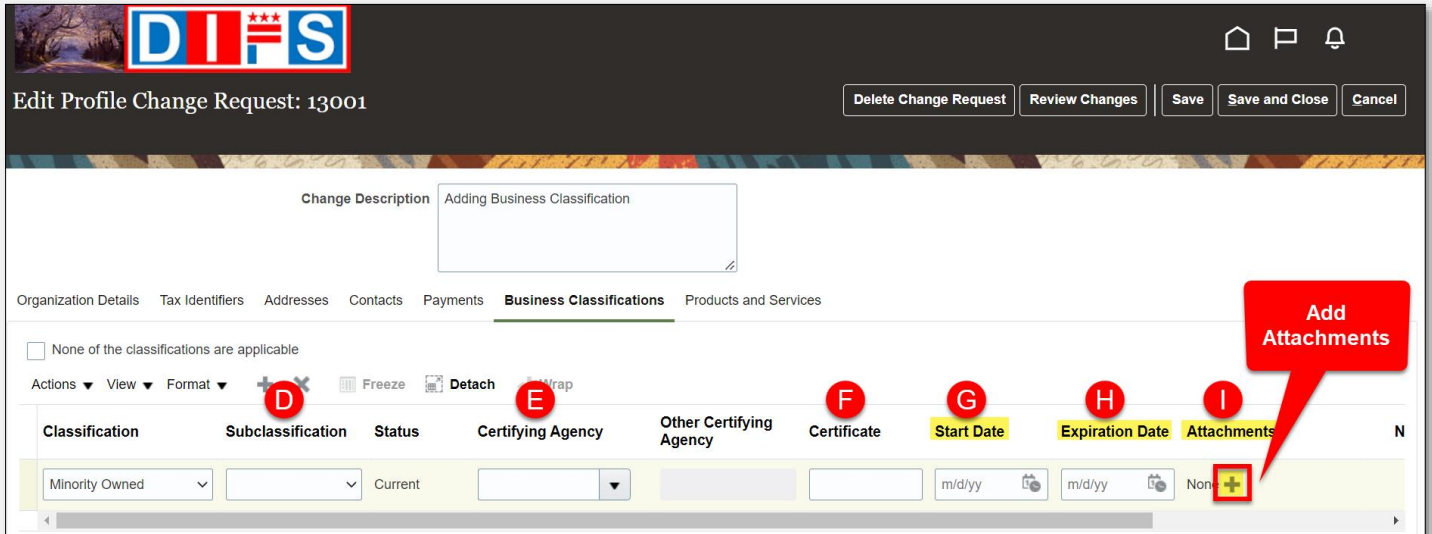
F. Certificate (optional) – Enter the certification number.

 **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**



Change Description: Adding Business Classification

Organization Details Tax Identifiers Addresses Contacts Payments **Business Classifications** Products and Services

None of the classifications are applicable

Actions View Format **D** Freeze Detach **E** Wrap

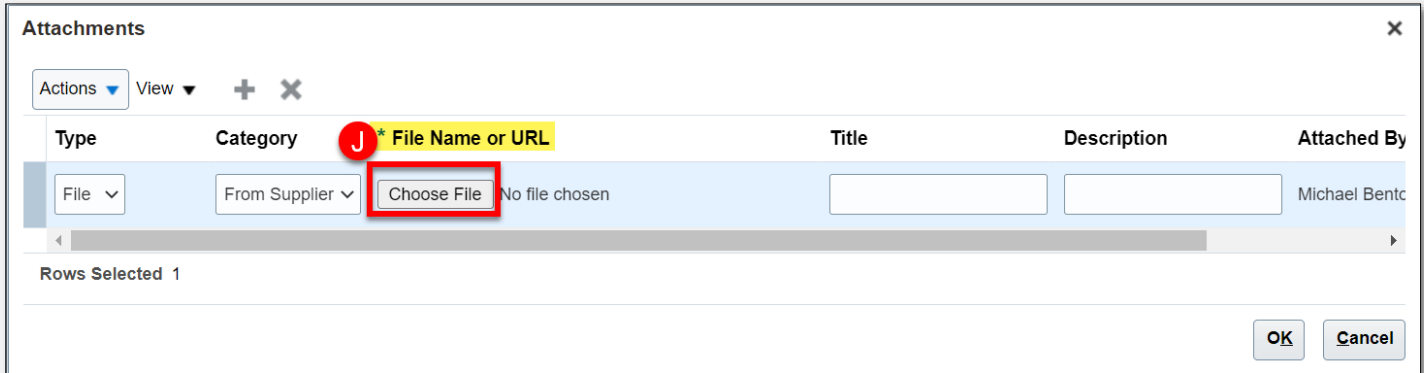
Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	<b>G</b> Start Date	<b>H</b> Expiration Date	<b>I</b> Attachments	N
Minority Owned		Current				m/d/yy	m/d/yy	Non <b>+</b>	

**Add Attachments**

## 13 Adding a Business Classification (continued)

The **Attachments** window will open

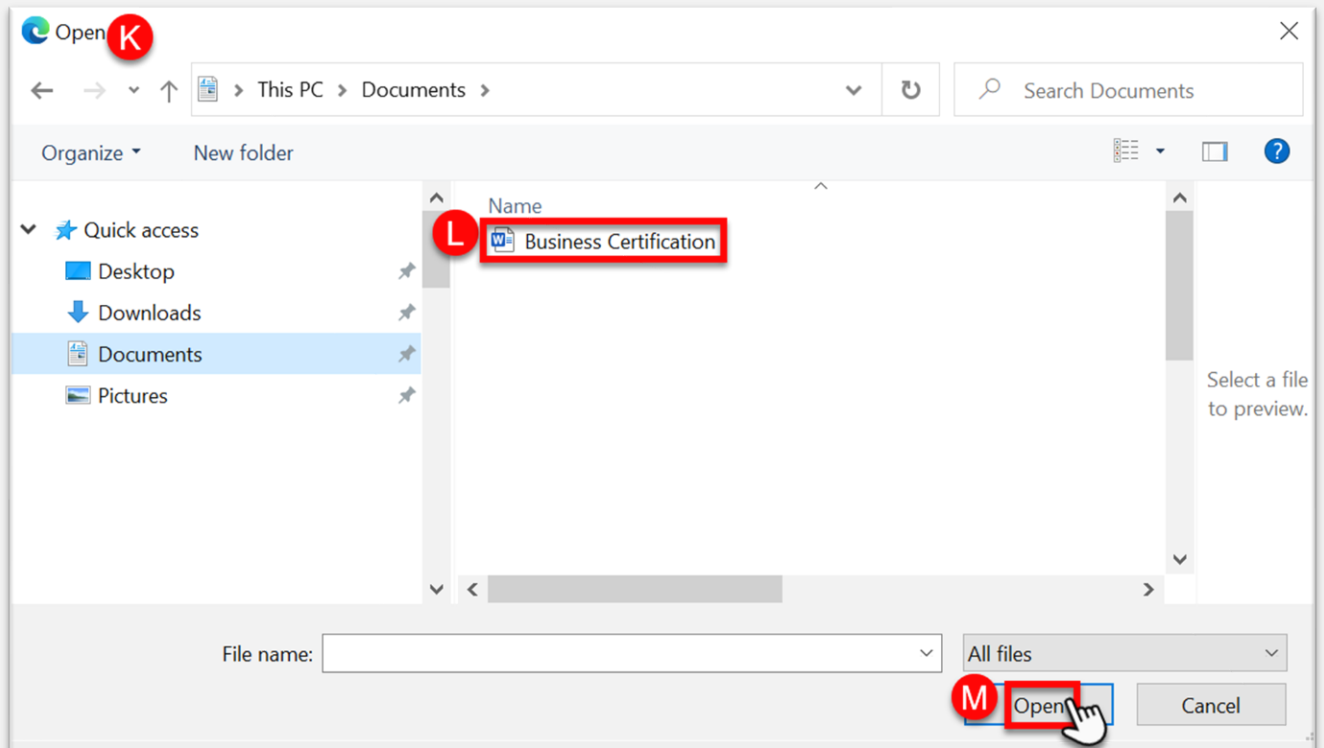
J. **File Name or URL (required)** - click on the **Choose File** button



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

Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	Business Certification.docx	Business Certification.doc	Certification	anonymous

- Q. Verify the Classification entered
- R. Click the **Save** button

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments
Minority Owned	Hispanic	Current	Other	SBA	123456	1/1/22	12/31/25	Business Certification.docx

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.

Change Description

**Organization Details** | Tax Identifiers | Addresses | Contacts | Payments | Business Classifications | Products and Services

General

\* Supplier Name

Supplier Number 10

Supplier Type Vendor-Individual

Identification

D-U-N-S Number

Customer Number

SIC

Tax Organization Type Individual

Status Active

Attachments None +

National Insurance Number

Corporate Web Site

The **Attachments** window will open

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

Attachments

Actions View + X

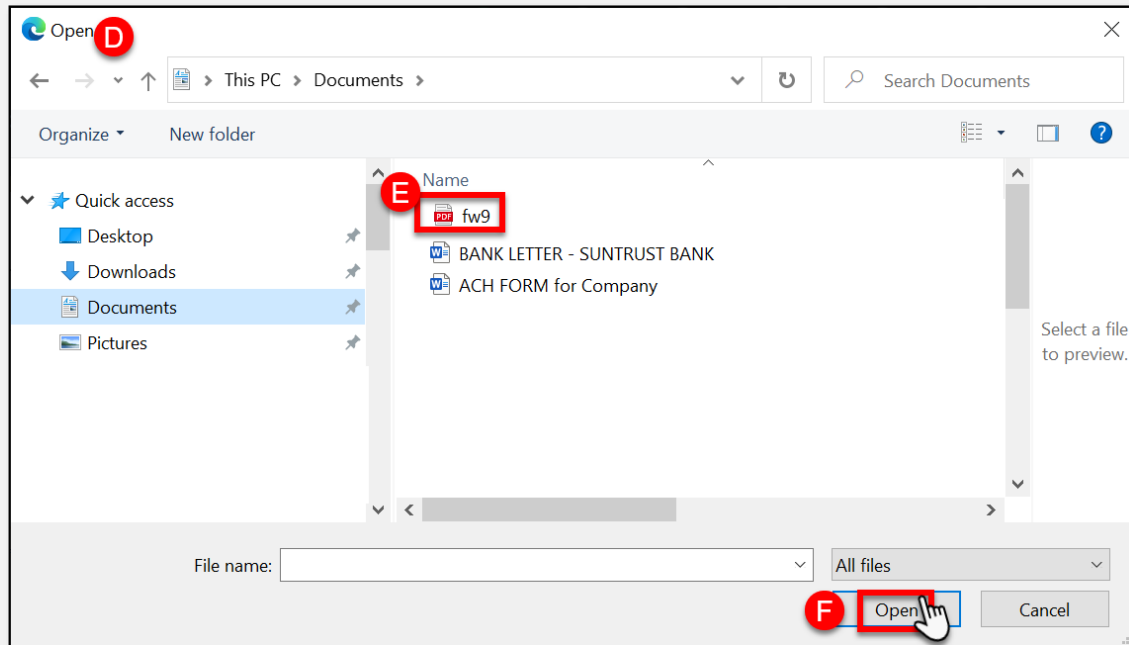
Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	Choose File No file chosen	<input type="text"/>	<input type="text"/>	anonymous

Rows Selected 1

OK Cancel

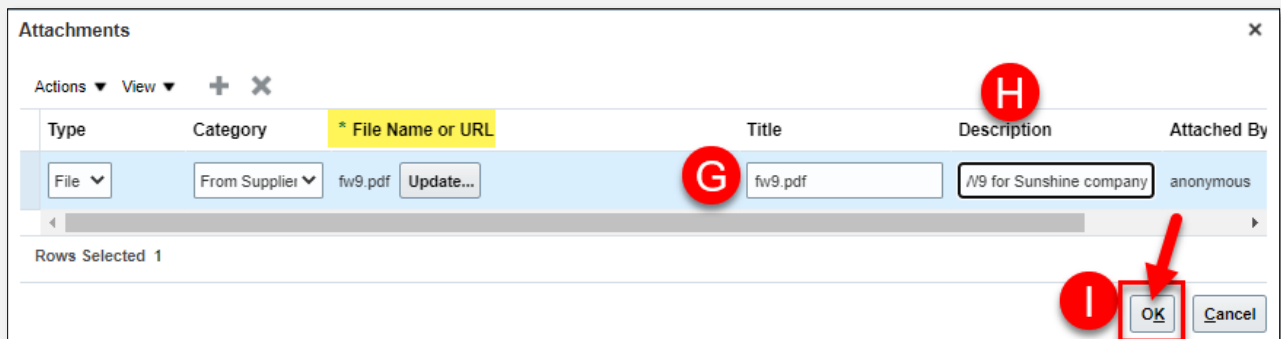
## 14 Attach Documents to Submit (continued)

- 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

Change Description: Supplier Updates

Organization Details Tax Identifiers **Addresses** Contacts Payments Business Classifications Products and Services

Actions View Format + ✎ ✕ Status Active Freeze Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active
REMIT TO	654 Alligator Way, Suite 601, TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active

Columns Hidden 3

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

Review Changes

Change Description: Adding Business Classification

Edit **Submit** Cancel

Addresses

Address Name	Address	Phone	Address Purpose	Fax	Status	Details
HEADQUARTERS	500 Sunnydale Dr, Suite 200, TAMPA, FL 33617	+1 (800) 123-4567	Ordering		Active	Details
REMIT TO	654 Alligator Way, Suite 601, TAMPA, FL 33617	+1 (800) 987-6543	Remit to		Active	Details

Contacts

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Stone, Maria	Receivables Specialist	maria@hello.com	+1 (888) 123-4567			Active	Details

Bank Accounts

Primary	Account Number	IBAN	Currency	Bank Name	Details
+	XXXXXX6789		USD	PNC BANK	Details
•	XXXXXX		USD	WELLS FARGO BANK	Details

Business Classifications

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Attachments	Notes	Provided By	Confirmed On	Details
+	Minority Owned	Hispanic	Current	Other	SBA	123456	1/1/22	12/31/25	Business Certification.docx		10/19/22	Details

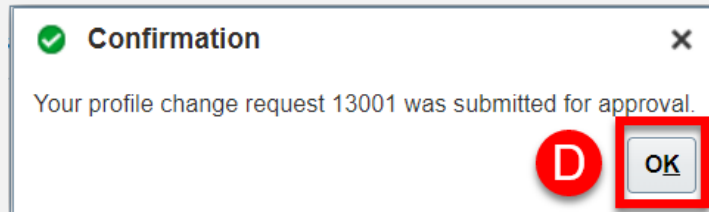


## 15 Review and Submit Changes (continued)

**Confirmation** – A confirmation message appears stating:

Your profile change request XXXX was submitted for approval

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

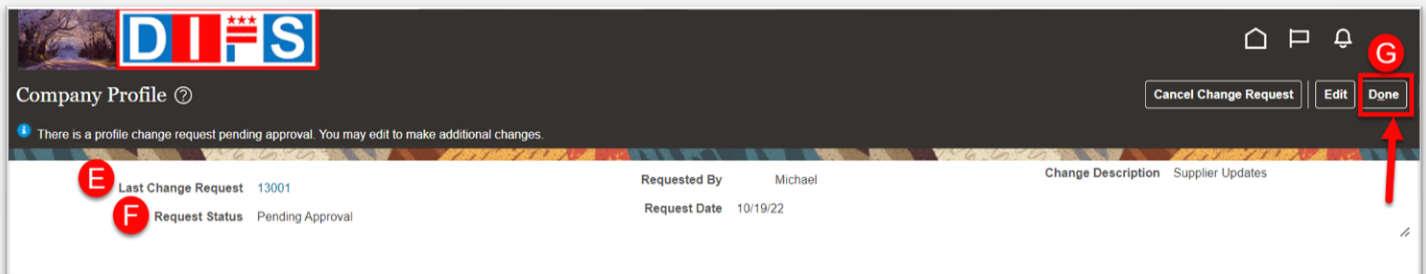


The **Company** Profile page displays

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.

