

SUP.4.8 Manage Profile – Business Classifications

Role: Supplier Bidder, Supplier Sales Representative, Supplier Customer Service Representative

Objective: By completing this topic, you will learn how to Manage Profile –Business Classifications/ CSLB/Certificates Of Insurance/DBE.

Navigation Hint: Home > Supplier Portal > Tasks > Company Profile > Manage Profile

Test Script Dependency:

Expected Result: Supplier will be able to manage Products & Services.

Test Script Execution Duration: 6 Minutes

Step No.	Step Description	Navigation Path
11	Log into Oracle and click on the Supplier Portal icon.	Home Page -> Supplier Portal -> Supplier Portal
12	Scroll down to the bottom of the page and on the click the Manage Profile under Company Profile section.	Tasks > Company Profile > Manage Profile Company Profile Manage Profile
13	Click Edit button on top right.	Edit

SCM: Supplier Portal – Oracle 24C



Step No.	Step Description	Navigation Path
14	Optional Click on Yes to Proceed.	Warning × POZ-2130390Making edits will create a change request for the profile. Do you want to continue? Yes
15	Enter a Change Description.	Change Description
16	Click on the Business Classification tab.	Business Classifications
17	Business Classifications.	



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Step No.	Step Description	Navigation Path
18	Add or remove any Classifications as needed on the drop down Note : Add CSLB Contractors license	Classification CSLB Contractors License CSLB Contractors License California Environmental Protection Agency Certificate of Insurance Injury and Illness Prevention Program Minority Owned Public Works Contractor Registration (PWCR) Safety EMR/Risk Approval Secretary of State Business Entity Service-disabled Veteran Owned Small Business Sole Source Veteran Owned Woman Owned
19	Click the icon or Select and Add from dropdown.	× E
20	Certifying Agency Click the Other.	Certifying Agency Other Certifying Agency Certificate Start Im/db/ Im/db/ Other Other Certifying Agency Search Im/db/

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Step No.	Step Description	Navigation Path
21	CSLB Contractors License #, any relavent information for expireation dates copy of screen shots from the website. COI's can be added, expiration date will be the earliest expiration date listed on the certificate.	Other Certifying Agency CSLE Start Date Expiration Date Attachments Notes P m/dd/yyyy Im/dd/yyyy Im/dd/yyyy Im/dd/yyyy Im/dd/yyyy
22	Click the Save button.	Save
23	Review changes Confirm	Confirm Business Classification Updates × I confirm the accuracy of the new or updated business classifications. Confirm Cancel
24	Click the Review Changes button. Make any edits	Review Changes
25	Click the Submit button.	Submit
26	Click OK button.	Confirmation × Your profile change request 2018 was submitted for approval.

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Step No.	Step Description	Navigation Path
		OK
27	Click Done button.	D <u>o</u> ne
28	End of Procedure.	

