Create & Submit a Profile Change Request (Approved Suppliers)

AHA Supplier Portal Guide: Create Change Request (Approved Suppliers)

Introduction

AHA requests that all approved supplier proactively maintain your business' information, in our Supplier Portal, any time your information changes. Such information we request you maintain includes:

- Supplier Name (Note: a new W-9/W-8 Tax Form is required)
- Tax ID Number (Note: a new W-9/W-8 Tax Form is required)
- Remittance Information including:
    - Remit-to Address
    - Preferred Payment Method (ie: Check, ACH, Wire Transfer)
    - Bank Account Information for ACH or Wire Transfer payment methods
- Contacts including:
    - Account Representatives
    - Accounts Receivable Contacts
    - Customer Support Representatives
- Diversity Status & Certificate

Please follow the steps outlined in this guide for creating and submitting a Change Request to update your business information.

Log into the Supplier Portal and Access Supplier Profile

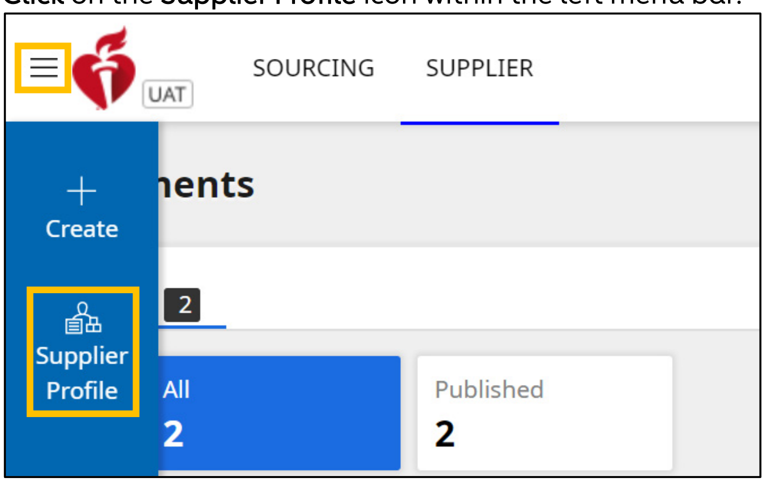
Please follow the steps outlined below to log into the AHA and access your Supplier Profile.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>

- Within your web browser go to https://smart.gep.com/
- You will be taken to a login screen where you will **enter** your **Username** and **Password**.
- **Press** the **LOGIN** button

</td></tr>
<tr><td>2</td><td>

- Once you are logged in, **click** on the menu icon ☰ in the top left of the screen
- **Click** on the **Supplier Profile** icon within the left menu bar.



</td></tr>
<tr><td>3</td><td>

- You will be taken to your company's supplier profile

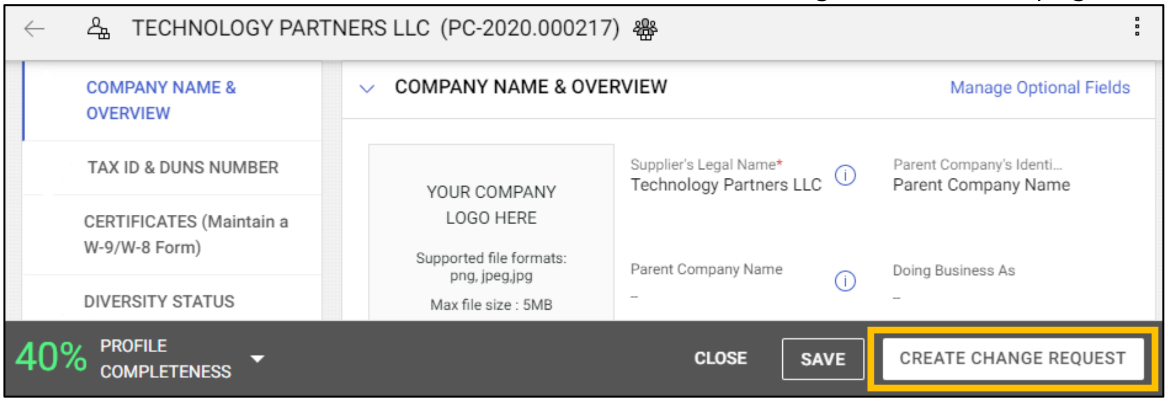
</td></tr>
</table>

Update Supplier Name, Tax ID & W-9/W-8 Form

Please follow the steps below to update your Supplier Name, Tax ID Number, and W-9/W-8 Tax Form. AHA requires you attach a **new** signed W-9/W-8 form if your Company Name or Tax ID changes.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>

- **Click** on the **CREATE CHANGE REQUEST** button at the bottom right corner of the page



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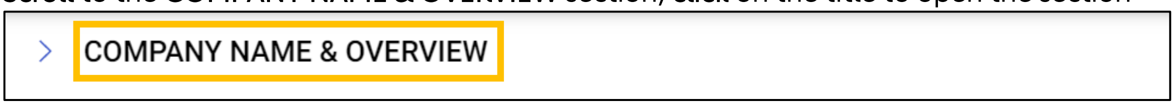
<tr><td>2</td><td>

- **Scroll** to the **COMPANY NAME & OVERVIEW** section, **click** on the title to open the section



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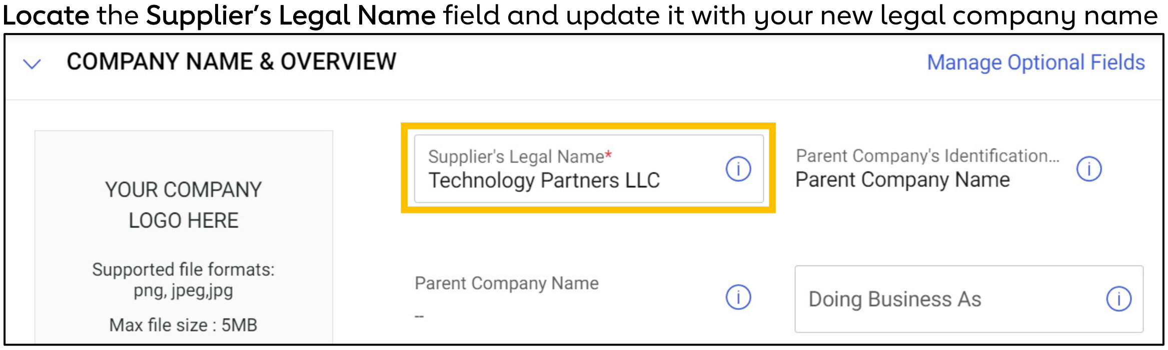
<tr><td>3</td><td>

- **Locate** the **Supplier's Legal Name** field and update it with your new legal company name



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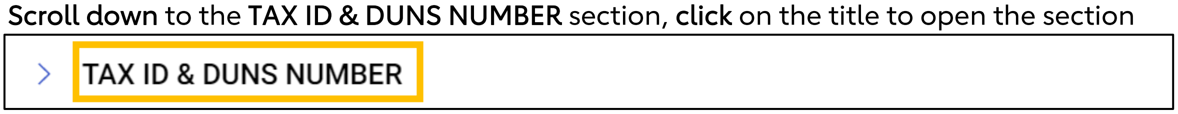
<tr><td>4</td><td>

- **Scroll down** to the **TAX ID & DUNS NUMBER** section, **click** on the title to open the section



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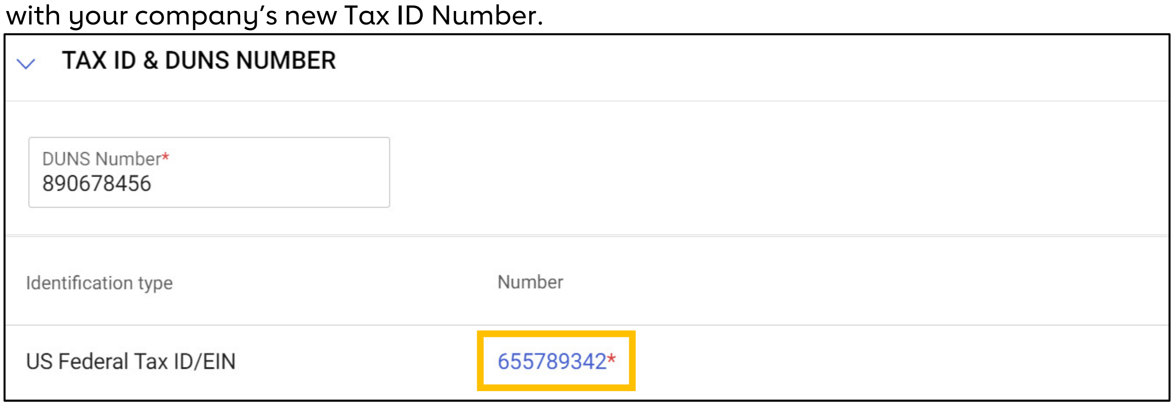
<tr><td>5</td><td>

- **Locate** you Tax ID Number (Identification Number field), **click** on the number, and **update** it with your company's new Tax ID Number.



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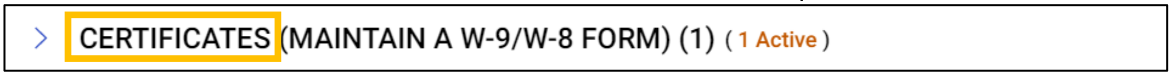
</table>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>6</td><td>

- **Scroll down** to the **CERTIFICATES** section, click on the title to open the section



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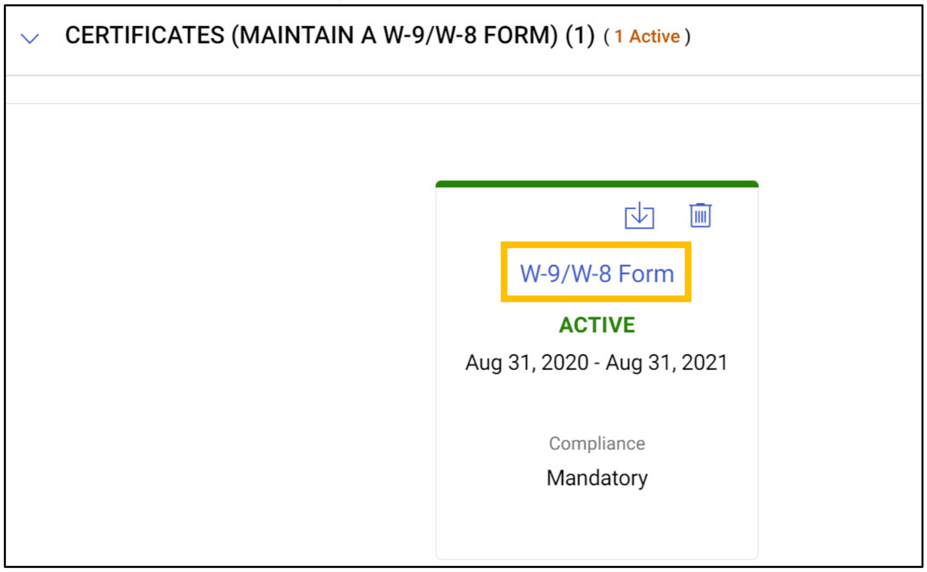
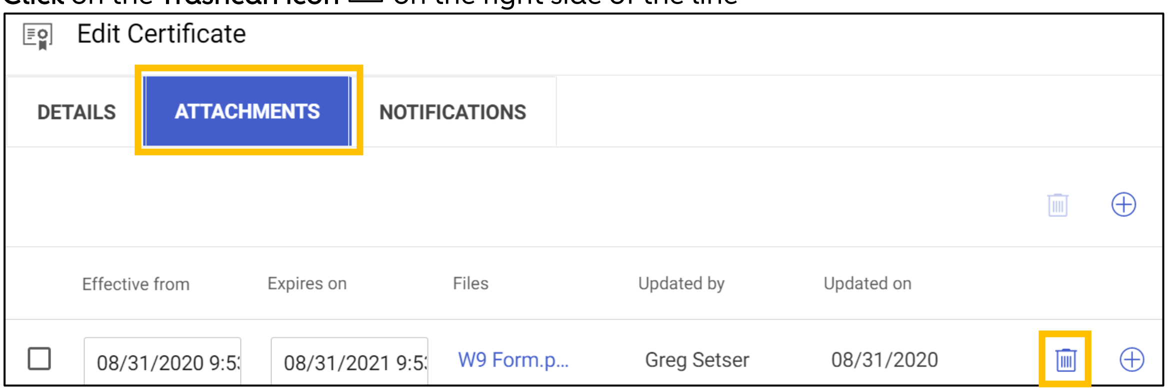
<tr><td>7</td><td>

- **Locate** the tile for the W-9/W-8 Form and click on the name within the tile.



</td></tr>
<tr><td>8</td><td>

- **Click** on the **ATTACHMENTS** tab at the top of pop-up window
- **Click** on the **Trashcan icon** on the right side of the line



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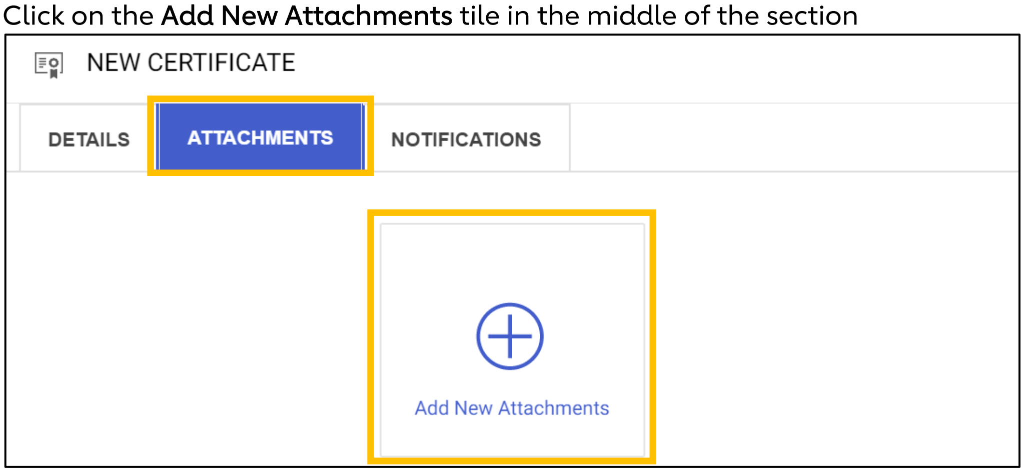
<tr><td>9</td><td>

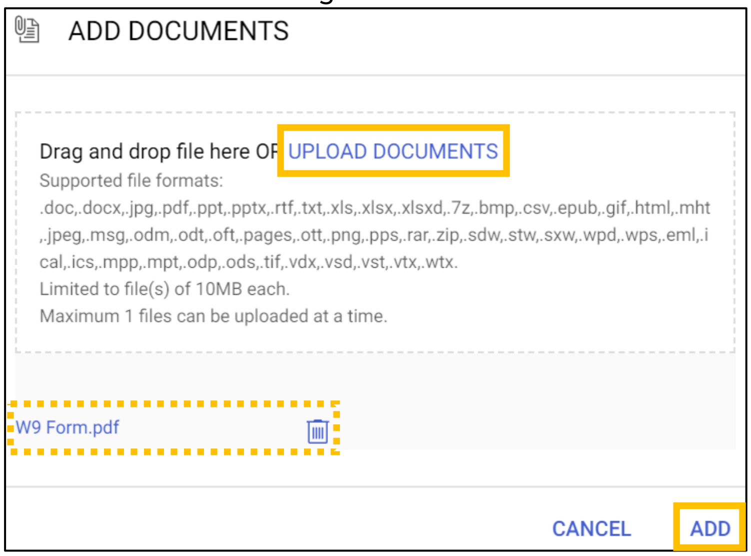
- Click on the **Add New Attachments** tile in the middle of the section



</td></tr>
</table>

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>10</td><td>

- **Click** on the **UPLOAD DOCUMENTS** link to find the W-9/W-8 Form you would like to upload
- Once the upload is complete, the document will appear towards the bottom of the window
- **Click** on the **ADD** button at the bottom right of the window



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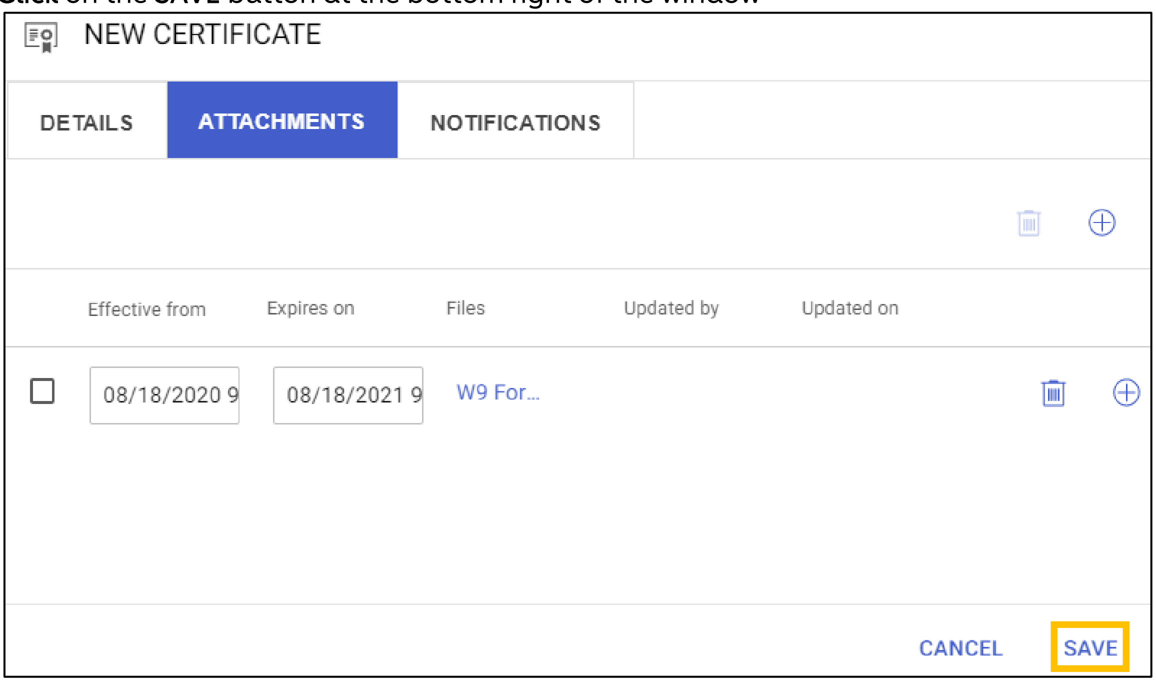
<tr><td>11</td><td>

- **Click** on the **SAVE** button at the bottom right of the window



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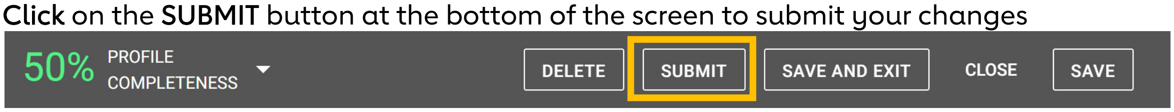
<tr><td>12</td><td>

- **Click** on the **SUBMIT** button at the bottom of the screen to submit your changes



</td></tr>
<tr><td>13</td><td>

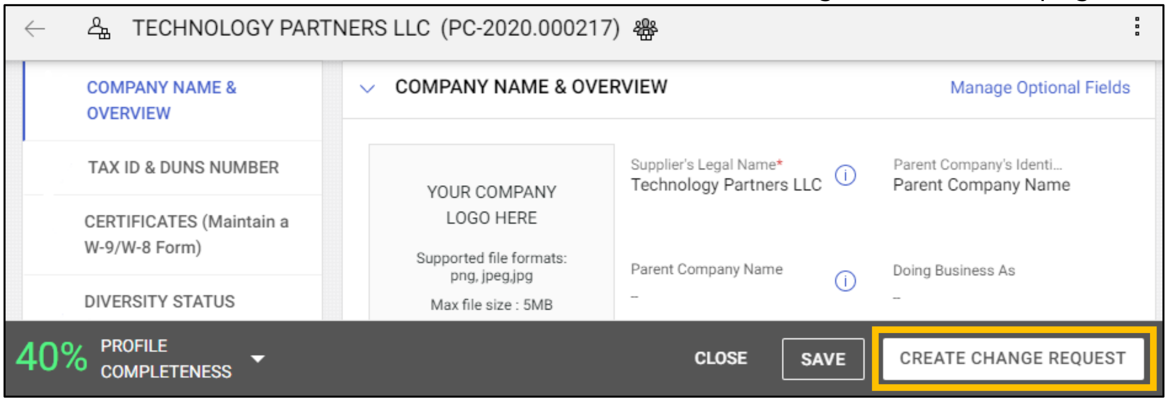
- AHA will review the change request and contact you if we find any issues.
- The updated information will take effect only after AHA approves the Change Request
</td></tr>
</table>

Update Remit-to Address and Payment Information

Please follow the steps below to update your Remittance/Payment Information including your Remit-to Address, Preferred Payment Method and Banking Details.

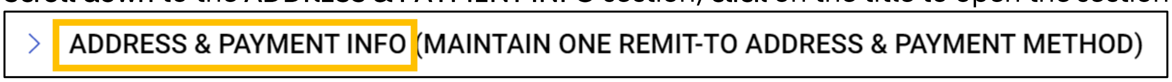
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>

- **Click** on the **CREATE CHANGE REQUEST** button at the bottom right corner of the page



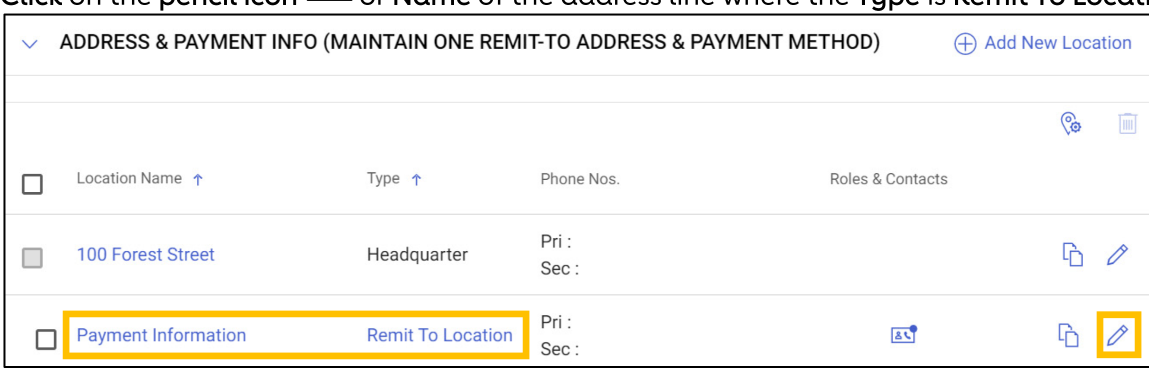
</td></tr>
<tr><td>2</td><td>

- **Scroll down** to the **ADDRESS & PAYMENT INFO** section, **click** on the title to open the section



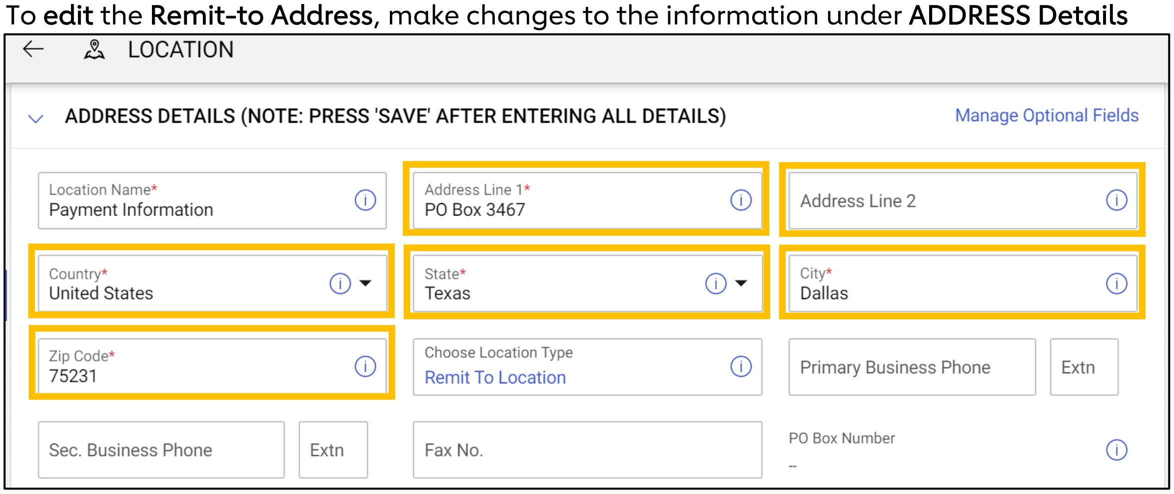
</td></tr>
<tr><td>3</td><td>

- **Click** on the **pencil icon** or **Name** of the address line where the **Type** is **Remit To Location**

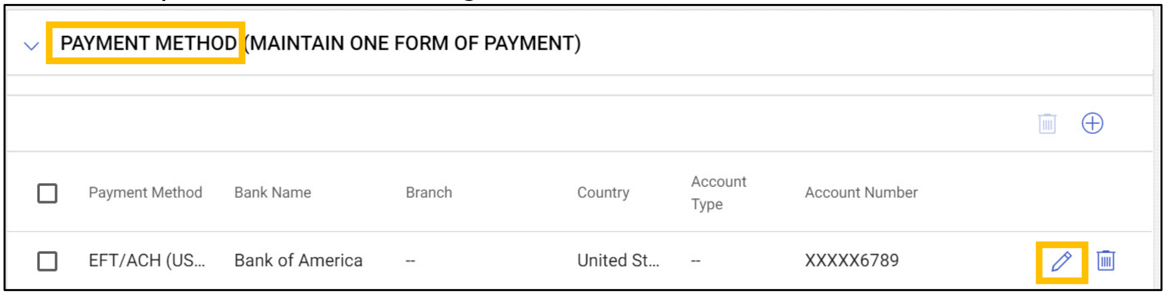
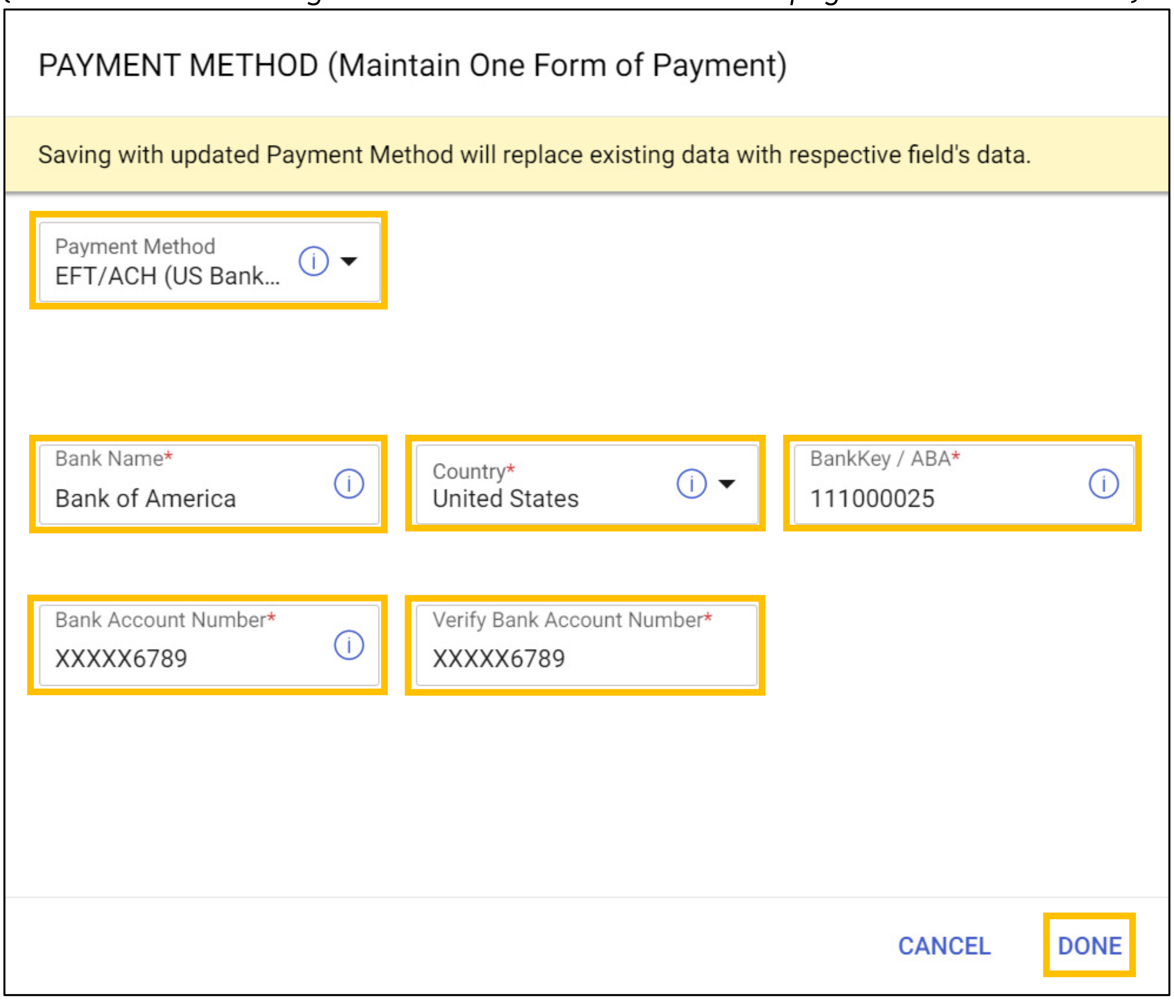


</td></tr>
<tr><td>4</td><td>

- A screen will open where you can **edit** the Remit-to Address & Payment Method
- To **edit** the **Remit-to Address**, make changes to the information under **ADDRESS Details**

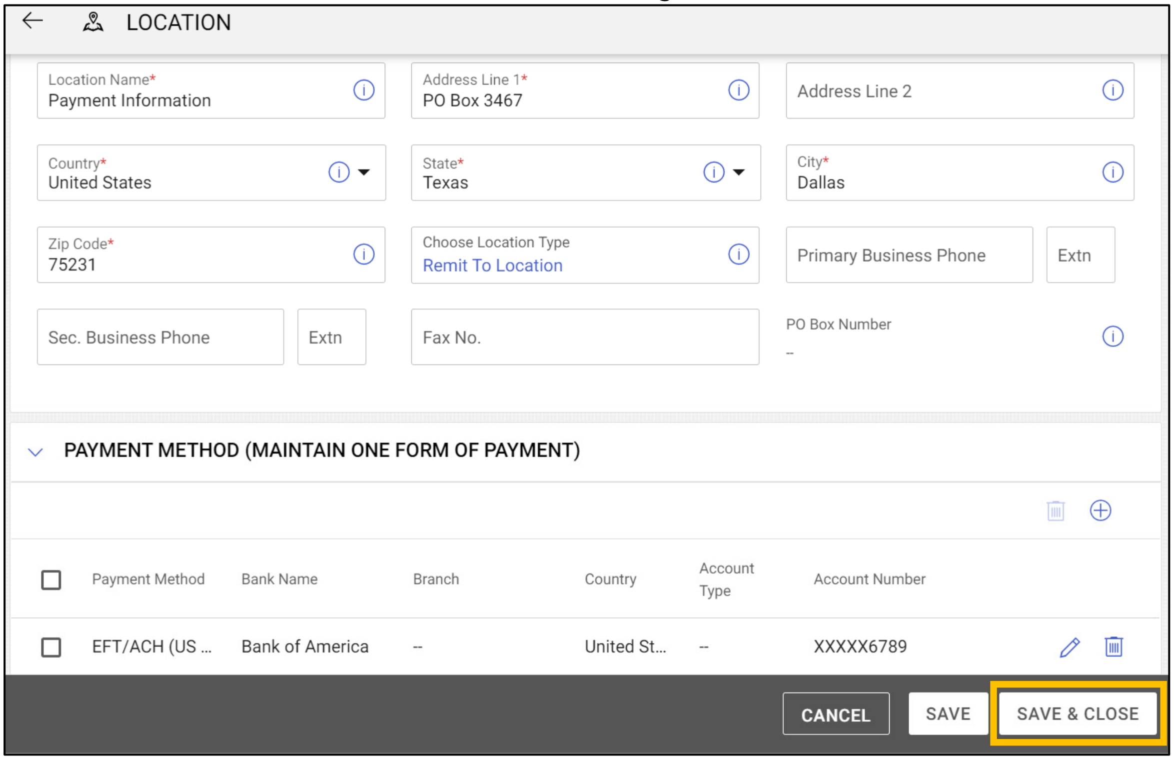


</td></tr>
</table>

Step	Description
5	• To **edit** the **Payment Method**, **click** on the **PAYMENT METHOD** title to expand the section • **Click** on the **pencil icon** on the right side of the line. 
6	• A pop-up window will appear showing the Payment Method and Bank Details • **Edit** the information, then **click** the **DONE** button at the bottom right of the pop-up window *(Note: The list of Banking fields will be different based on the payment method selected)* 

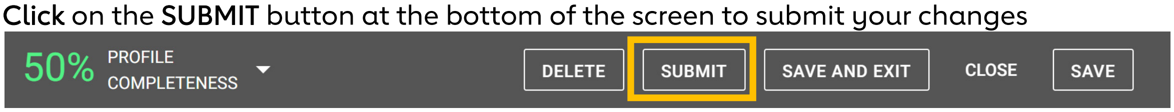
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>7</td><td>

- **Click** on the **SAVE & CLOSE** button at the bottom right of the screen



</td></tr>
<tr><td>8</td><td>

- **Click** on the **SUBMIT** button at the bottom of the screen to submit your changes



</td></tr>
<tr><td>9</td><td>

- AHA will review the change request and contact you if we find any issues.
- The updated information will take effect only after AHA approves the Change Request

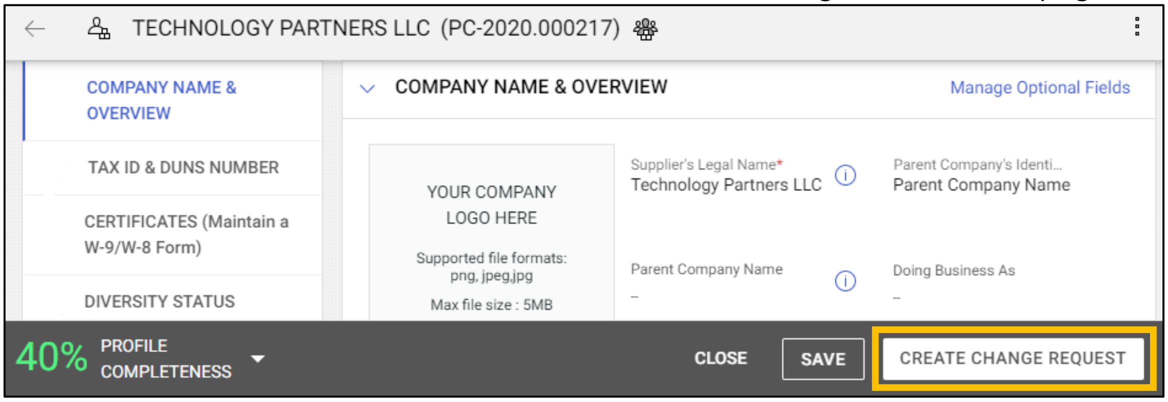
</td></tr>
</table>

Update (Add/Change/Delete) Contacts

Please follow the steps listed below to update your business' key contacts. At any time you can Add new contacts, Modify existing contacts, or Delete Existing Contacts

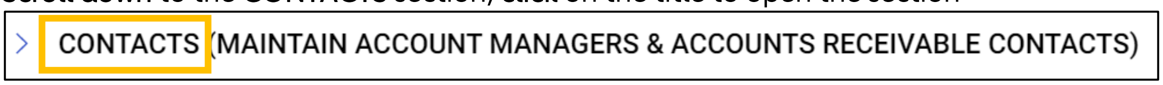
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>

- **Click** on the **CREATE CHANGE REQUEST** button at the bottom right corner of the page



</td></tr>
<tr><td>2</td><td>

- **Scroll down** to the **CONTACTS** section, **click** on the title to open the section

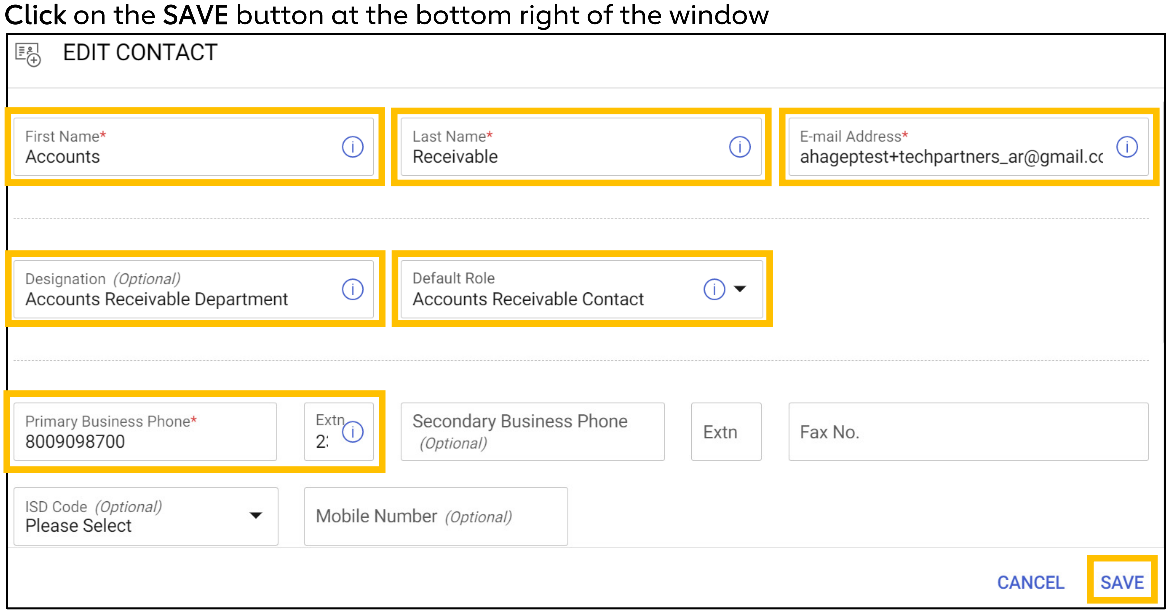


</td></tr>
<tr><td>3</td><td>

- The list of Contacts will display
- To **Edit** an existing contact, **Click** on the name of the contact

<table>
<tr><th></th><th>Full Name</th><th></th><th>Status</th><th>Email ID</th></tr>
<tr><td>☐</td><td>Gary Jones</td><td></td><td>Registered</td><td>ahageptest+garyjones@gmail.com</td></tr>
<tr><td>☐</td><td>Accounts Receivable</td><td></td><td>Non - Invited</td><td>ahageptest+techpartners_ar@gmail.com</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>

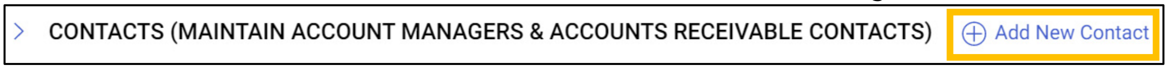
- A pop-up will open where you can **edit** the contact's information
- **Click** on the **SAVE** button at the bottom right of the window



</td></tr>
</table>

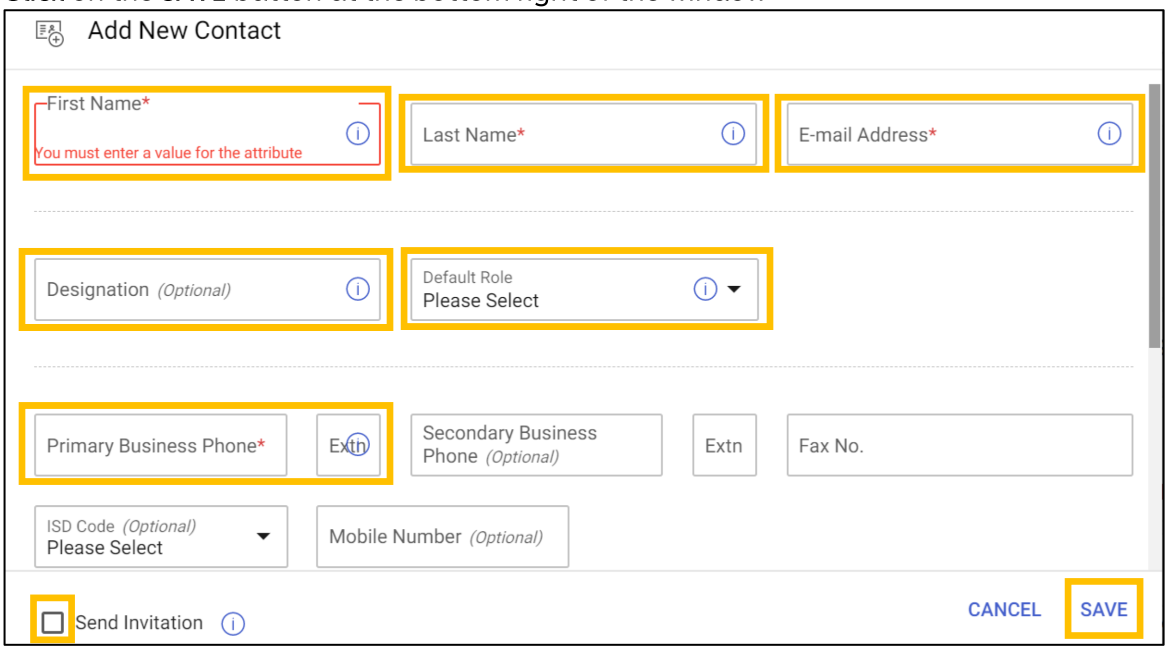
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>5</td><td>

- To **Add** a contact, **Click** on the (+) Add New Contact button at the right side of the section



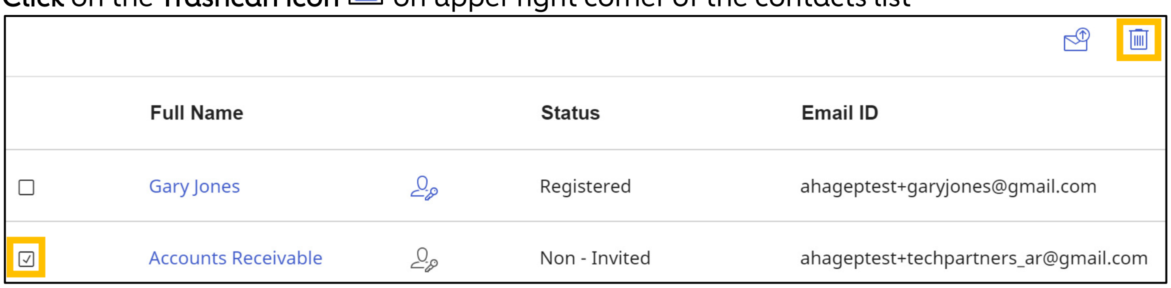
</td></tr>
<tr><td>6</td><td>

- A pop-up will open where you will **enter/select** the following information:
  - **First Name & Last Name:** Enter the contact's First and Last Name
  - **E-mail Address:** Enter the contact's Email
  - **Designation:** Enter the individuals job title (ie: A/R Manager)
  - **Default Role:** Select the appropriate role the contact will perform for AHA
  - **Primary Business Phone:** Enter the contact's phone number. Enter numbers only
  - **Send Invitation (Optional):** This allows the contact to register & access the Supplier Portal
- **Click** on the **SAVE** button at the bottom right of the window



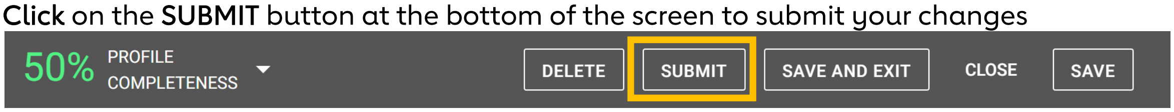
</td></tr>
<tr><td>7</td><td>

- To **Delete** a contact, **click** on the **checkbox** to the left of the contact,
- **Click** on the **Trashcan icon** on upper right corner of the contacts list



</td></tr>
<tr><td>8</td><td>

- **Click** on the **SUBMIT** button at the bottom of the screen to submit your changes



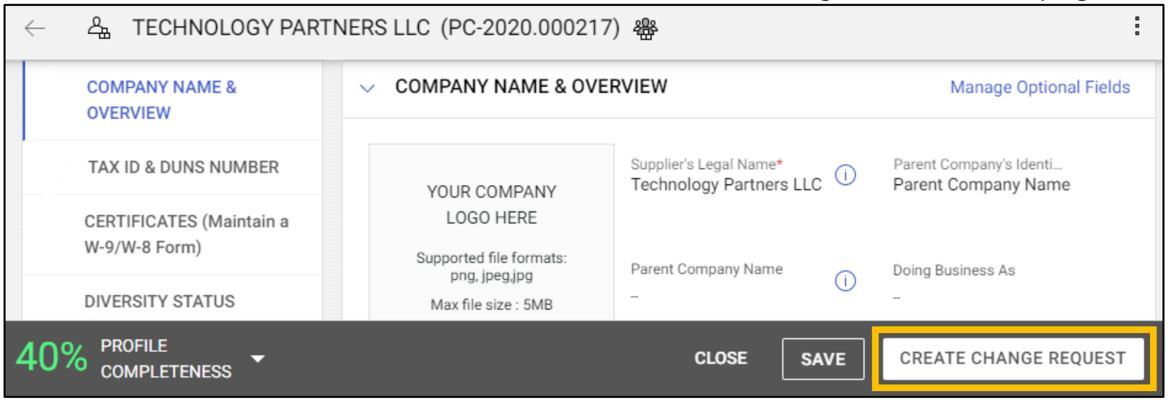
</td></tr>
</table>

Update Diversity Status

Please follow the steps listed below to update your business' Diversity Status and Diversity Certificate.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>

- **Click** on the **CREATE CHANGE REQUEST** button at the bottom right corner of the page



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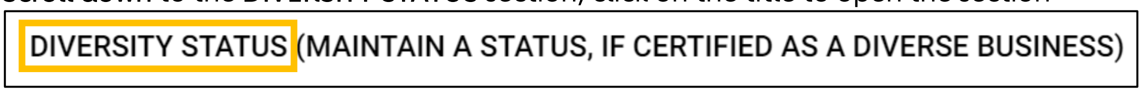
<tr><td>2</td><td>

- **Scroll down** to the **DIVERSITY STATUS** section, click on the title to open the section



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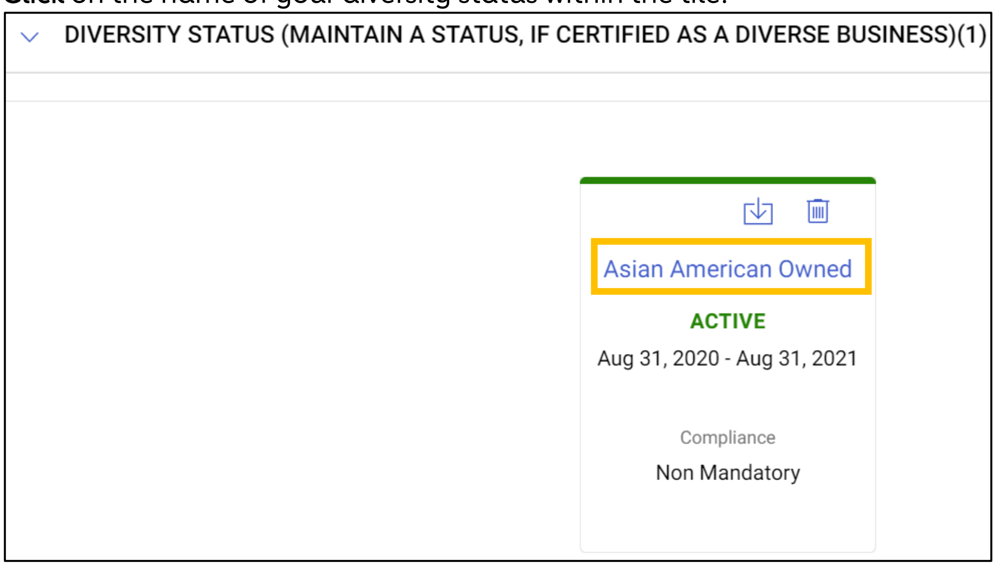
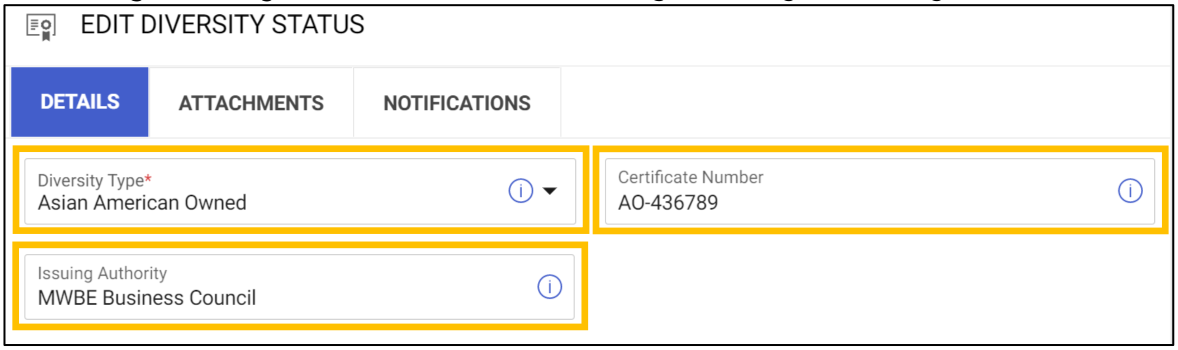
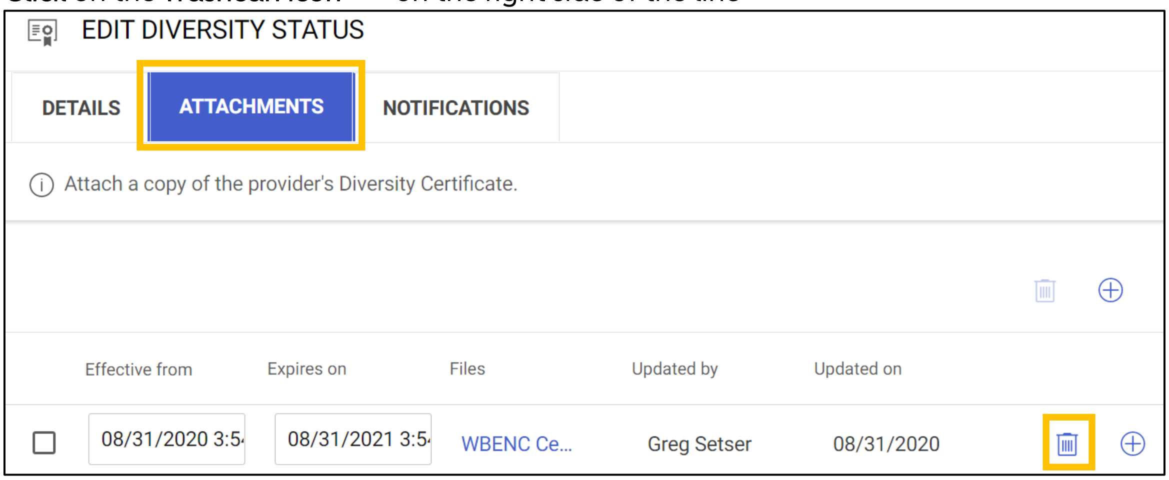
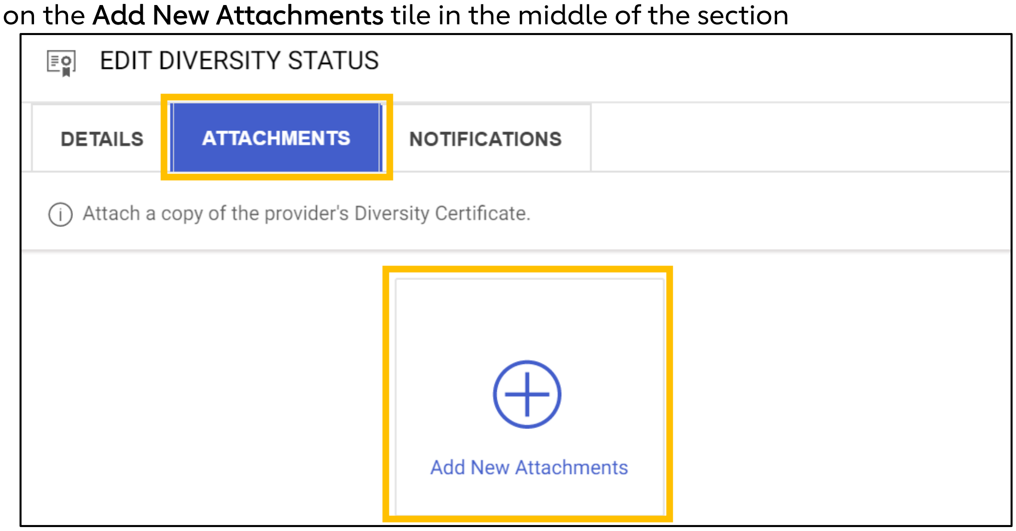
<tr><td>3</td><td>

- **Click** on the name of your diversity status within the tile.

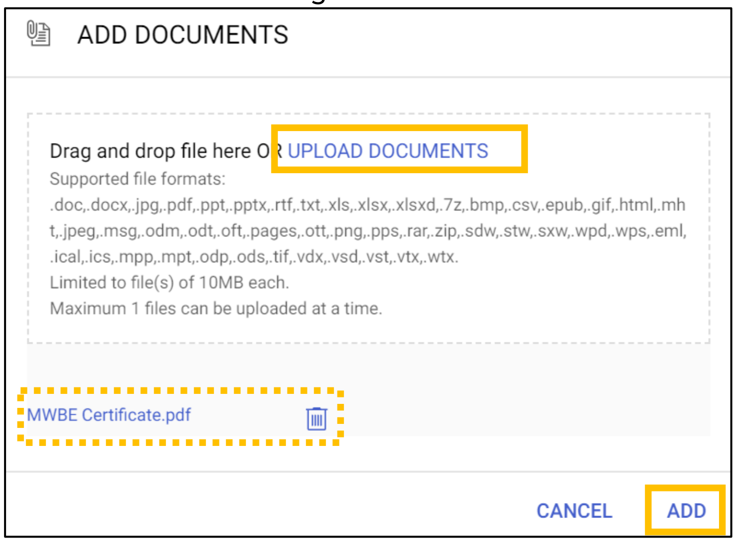


</td></tr>
</table>

Step	Description
4	• A pop window will open where you can **edit** the following information - **Diversity Status:** Classification you are certified under - **Certificate Number:** Enter the number found on your Diversity Certificate. - **Issuing Authority:** Enter the name of the Issuing Authority found on your Certificate 
5	• If you need to update your certificate, **Click** the **ATTACHMENTS** tab at the top of the window • **Click** on the **Trashcan icon** on the right side of the line 
6	• Click on the **ATTACHMENTS** tab at the top of pop-up window • Click on the **Add New Attachments** tile in the middle of the section 

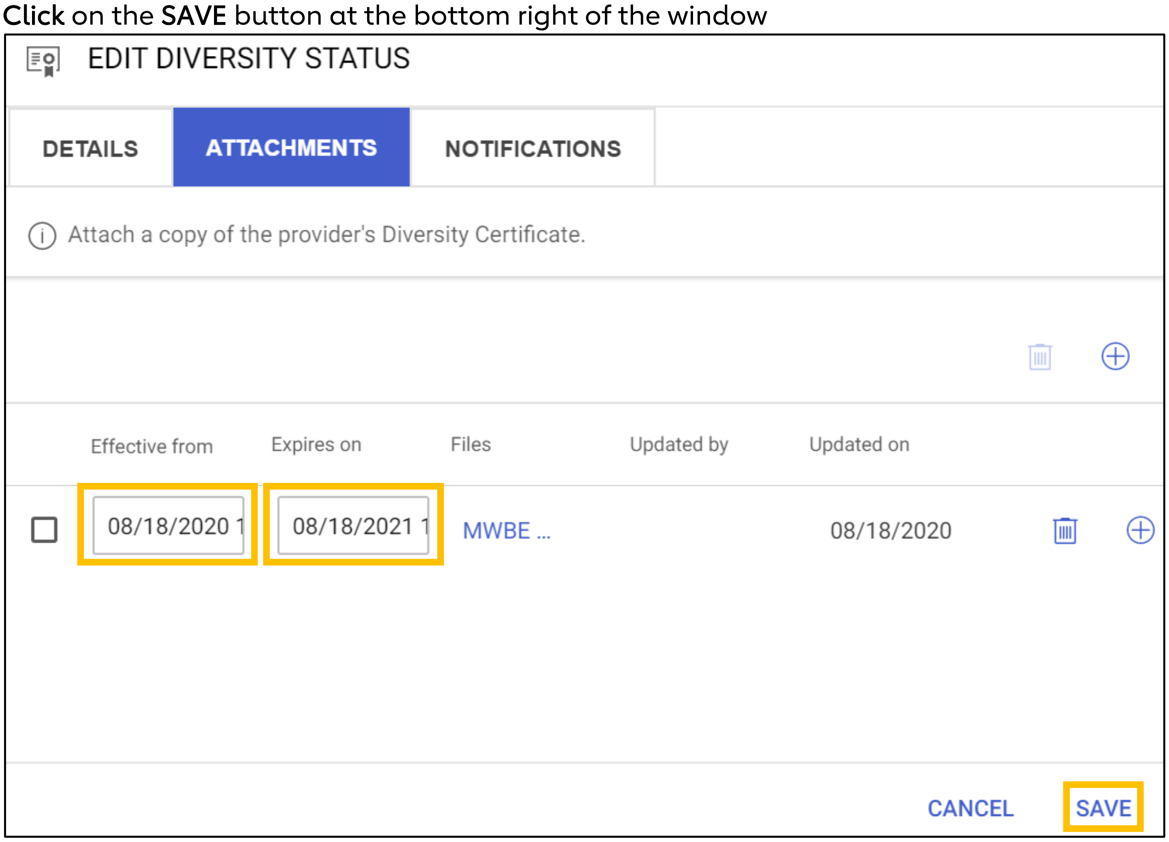
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>7</td><td>

- **Click** on the **UPLOAD DOCUMENTS** link to find the Certificate you would like to upload
- Once the upload is complete, the document will appear towards the bottom of the window
- **Click** on the **ADD** button at the bottom right of the window



</td></tr>
<tr><td>8</td><td>

- **Select** the correct **Effective** date and **Expiration** date for your certificate
- **Click** on the **SAVE** button at the bottom right of the window



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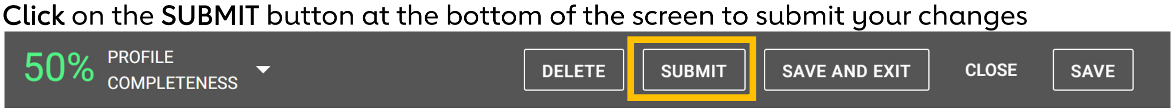
<tr><td>12</td><td>

- **Click** on the **SUBMIT** button at the bottom of the screen to submit your changes



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