Supplier Portal
Update Supplier Details

BHP

Overview

This User Guide is intended to detail steps for how to Update your Company Details.

Pre-requisite steps:

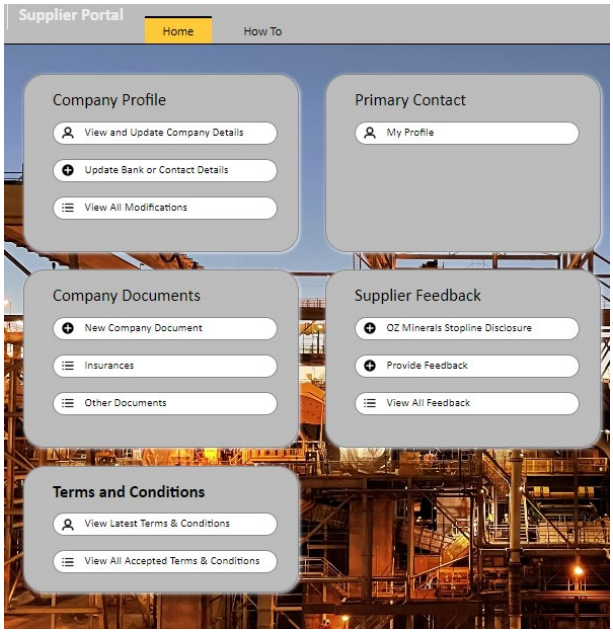
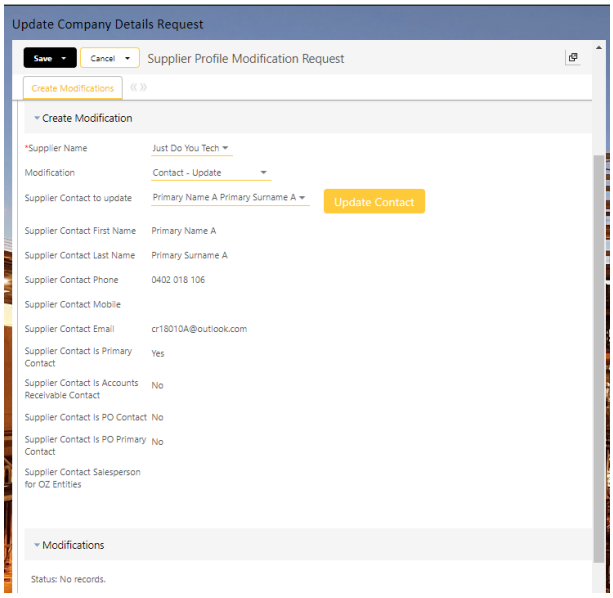
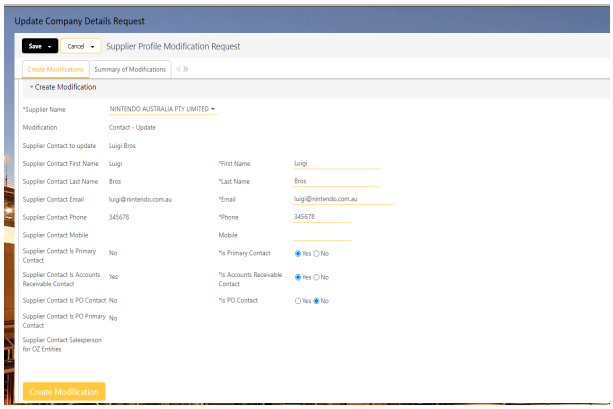
- Suppliers Onboarded (**Approved** Status)

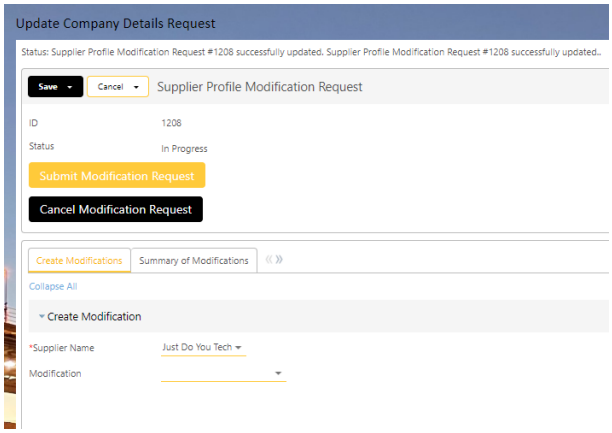
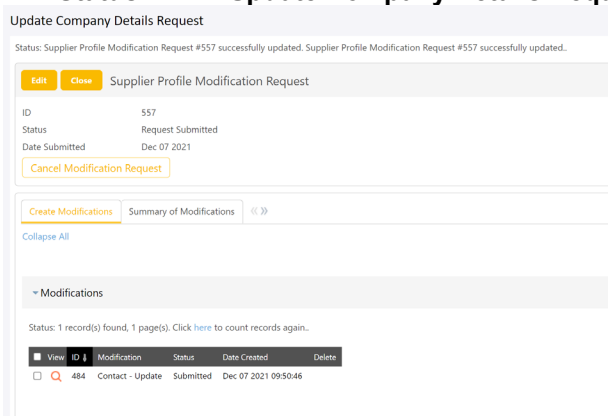
The following topics covered in this document are:

- Update Existing Contact
- Create New Primary Contact
- Create New Purchase Order email
- Update Bank Details
- Update Goods and Services
- Attach Insurances and Other Documents
- Record West Musgraves Package Number

Update Existing Contact

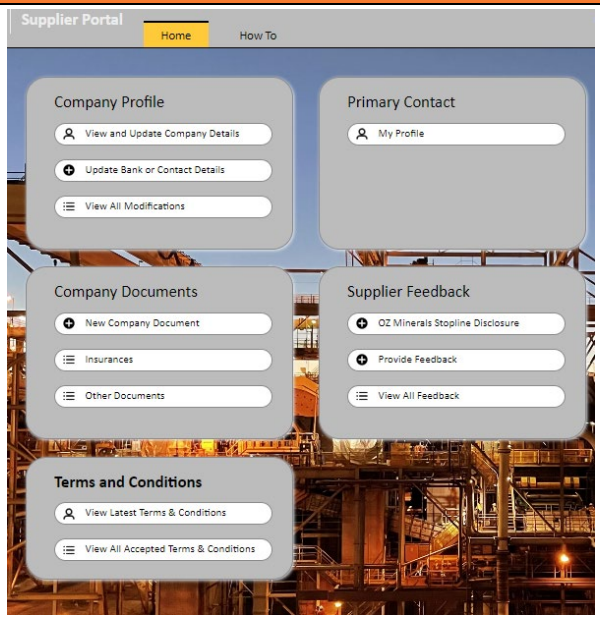
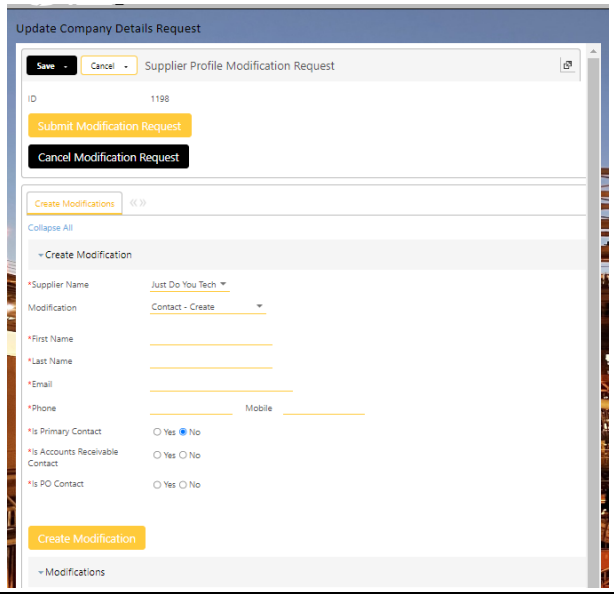
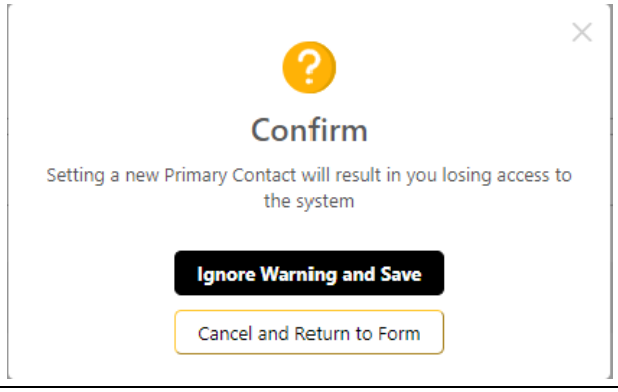
Select **Contact - Update** when the Primary Contact is updating an existing Primary Contact or Accounts Receivable or Sales Person current details. If Primary Contact wishes to nominate a new person to become a Primary Contact, please refer to Create New Primary Contact.

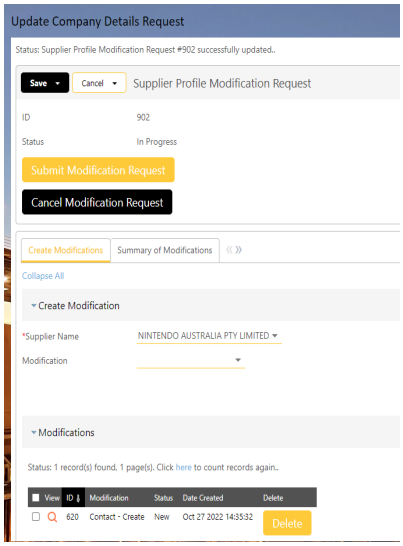
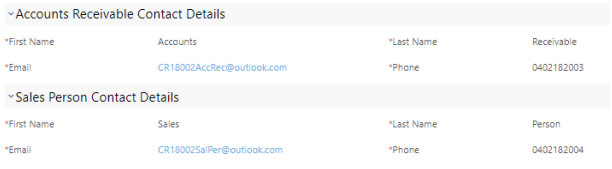
Step	Details	Screen
1.	As the Primary Contact for your Company, • Login to the Supplier Portal https://ozminerals.agiloft.com/logins/ozminerals/ozminerals-login.htm • Within the **Company Profile** tile on landing page, click on '**+ Update Bank or Contact Details**	
2.	Within the Update Company Details Request page, • Select your company name in **Supplier Name** • Select '**Contact-Update**' in Modification • Select your name • Click '**Update Contact**' button.	
3.	• Update Primary Contact personal details **Primary Contact** • Select Yes **Is Primary Contact** • Click on **Create Modification** button	

Step	Details	Screen
4.	Click on **Submit Modification Request** button to submit the change	
Note	The **Status** on the **Update Company Details Request** is changed to **Request Submitted** 	
5.	An email is sent to Accounts Receivable and Sales Person representatives informing them of the updated changes.	The Modification to your Supplier Profile has been confirmed and the changes have been completed. The change details made are as follows: **Update Contact: Primary Name A Primary Surname A** | | Original | New | |---|---|---| | **First Name:** | Primary Name A | Primary Name A | | **Last Name:** | Primary Surname A | Primary Surname A | | **Email:** | cr18010A@outlook.com | cr18010A@outlook.com | | **Phone:** | 0402 018 105 | 0402 018 106 | | **Mobile:** | | | | **Is Primary Contact:** | Yes | Yes | | **Is Accounts Receivable Contact:** | No | No | | **Is PO Contact:** | No | No | | **Is PO Primary Contact:** | | No | | **Salesperson for OZ Entities:** | | | If these changes are unexpected, please liaise with Primary Name A Primary Surname A regarding the nature of the change and action accordingly. Alternatively, if you request the change to be updated, please email us.
Note	If you wish to update Account Receivable and or Sales Contact details apply the mentioned above steps and ensure the appropriate radio button is selected to Yes If you cannot access the system or the Primary Contact is no longer at the organization, please contact Agiloft-Business-Admin@ozminerals.com to make changes.	

Create New Primary Contact

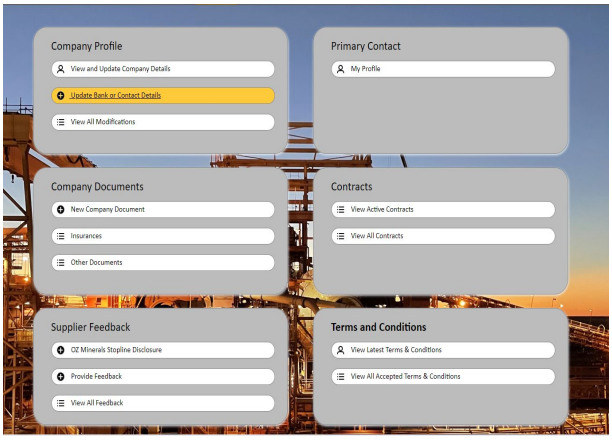
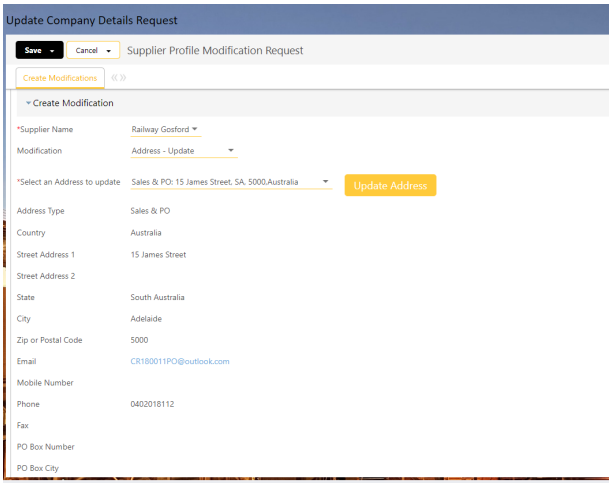
Select Contract – Create when the Primary Contact is creating a new person to become the Primary Contact. If Primary Contact wishes to update existing Primary Contact or Accounts Receivable or Sales Person details, please refer to Update Existing Contact.

Step	Details	Screen
1.	As the Primary Contact for your Company, • Login to the Supplier Portal • Within the **Company Profile** tile on landing page, click on '**+ Update Bank or Contact Details**	
2.	Within the Update Company Details Request page, • Select your company name within **Supplier Name** • Select '**Contact-Create** within Modification • Enter new data in mandatory fields • Select Yes if change applies to new Primary Contact • Select No if Accounts receivable and or Sales Contacts are different to Primary Contact, if same click Yes • Click '**Create Modification**' button.	
3.	The system will notify you that setting a new Primary Contact will result in the existing Primary Contact loosing access to the system Click **Ignore Warning and Save** button	

Step	Details	Screen
4.	The **Status** on the **Update Company Details Request** is changed to **In Progress** Click on **Submit Modification Request** button in the top left hand corner Submit Modification Request	
5.	Emails are sent to Accounts Receivable and Sale Person contacts to request an approval for the modification.	
6.	The recipient will need to follow the instructions within the email.	A request to change Supplier Profile details has been submitted for Gypsy & The Slums on 25 May 2023 14:11 ACDT/ACST. The change details are as follows: **Create Contact** | | **New** | | **First Name:** | Name 4 | | **Last Name:** | Last Name 4 | | **Email:** | CR18002D@outlook.com | | **Phone:** | 0402 182 100 | | **Mobile:** | | | **Is Primary Contact:** | Yes | | **Is Accounts Receivable Contact:** | No | | **Is PO Contact:** | No | | **Is Primary PO Contact:** | No | | **Salesperson for OZ Entities:** | |
Note	When all modifications are approved the change will take place within a fifteen-minute window An email will be sent to the new Primary Contact. The Primary Contact will need to: • Click on the first here link to read the instructions to register access to the Supplier Portal email • Then click on the second here link to commence the registration process to the OZ Minerals Supplier Portal	A agiloftdev@ozminerals.com Tue 12/7/2021 2:01 PM To: You Dear cr000706 CASS You have been nominated to be the Primary Contact on the OZ Minerals Supplier Portal. In order to access the Supplier Portal, your password will need to be reset. Please refer to the document here for instructions to reset your password and login. Click here to access the OZ Minerals Supplier Portal If you believe this to have occurred in error, please email us *This is an auto-generated email. Please do not reply.* OZ MINERALS A modern mining company

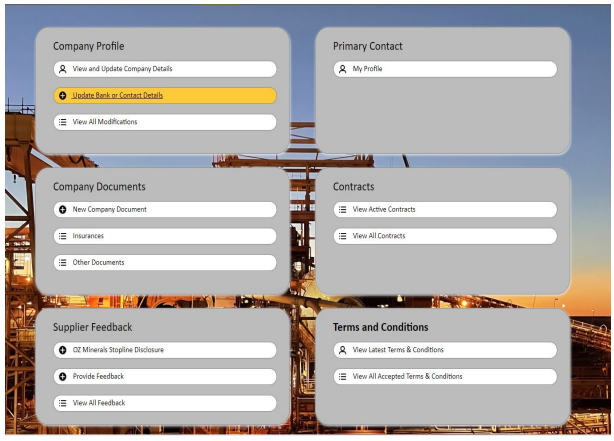
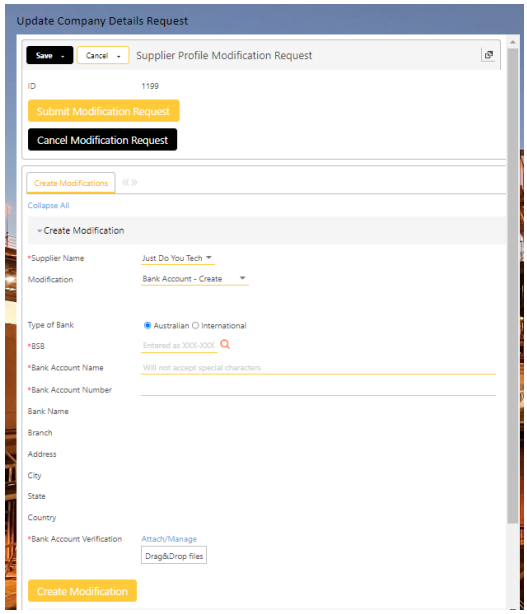
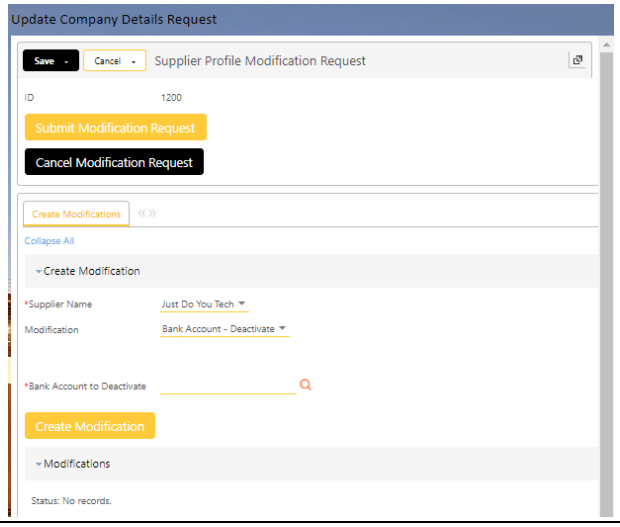
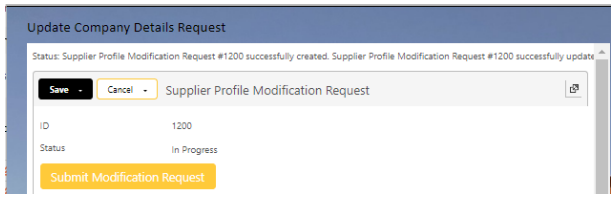
Update New Purchase Order email

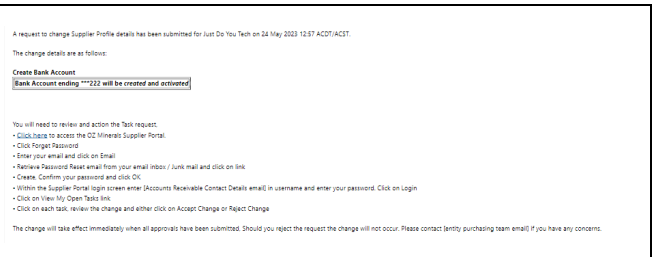
When PO email has changed, please follow the steps below.

Step	Details	Screen
1	As the Primary Contact for your Company, • Login to the Supplier Portal • Within the **Company Profile** tile on landing page, click on '**+ Update Bank or Contact Details**	
2	Within the Update Company Details Request page, • Select your company name within **Supplier Name** • Select '**Address-Update** within Modification • Click Update Address • Update any fields and ensure **Email** has the new purchase order email • Enter new data in mandatory fields Click '**Create Modification**' button. • Click **Submit Modification** button	

Update Bank Details

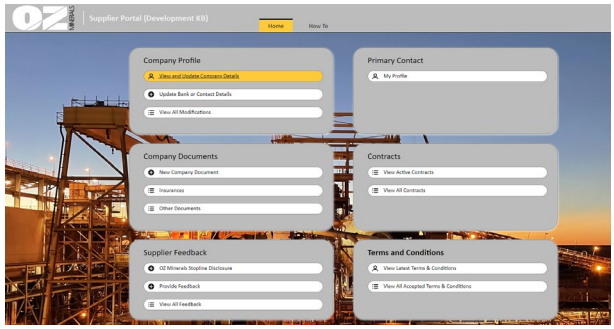
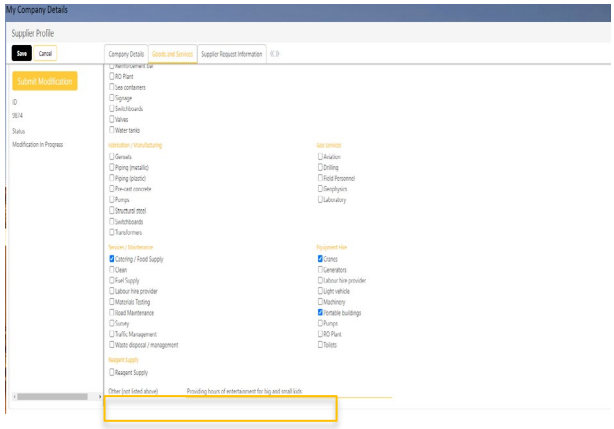
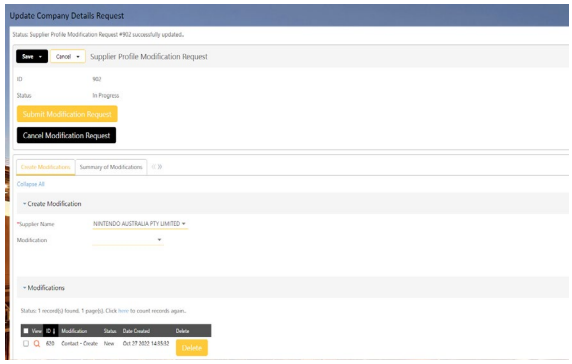
When you need to update bank accounts where payments are to be made please follow the steps below:

Step	Details	Screen
1.	• To update your bank details, navigate to the '**+ Update Bank or Contact Details**	
2.	Within the Update Company Details Request page, • Select your company name within **Supplier Name** • Select '**Bank-Create** within Modification • Enter **the new bank details (remember to enter BSB number as XXX-XXX)** • Enter data in mandatory fields • Attach Bank Statement within **Bank Account Verification** • Click 'Create Modification' button	
3.	You need to deactivate the old bank details. • Select '**Bank-Deactivate** within Modification • Click Search Icon • Select the bank account you wish to deactivate. • Click Create Modification button	
4.	Upon completing both Modifications • Click '**Submit Modification Request**'	

5.	Emails are sent to Accounts Receivable and Sale Person contacts to request an approval for the modification. The approver will need to follow the instructions within email to approve or reject the request.	 A request to change Supplier Profile details has been submitted for Just Do You Tech on 24 May 2023 12:57 ACDT/ACST. The change details are as follows: **Create Bank Account** **Bank Account ending ***222 will be *created and activated*** You will need to review and action the Task request. • Click here to access the OZ Minerals Supplier Portal. • Click Forget Password • Enter your email and click on Email • Retrieve Password Reset email from your email inbox / Junk mail and click on link • Create, Confirm your password and click OK • Within the Supplier Portal login screen enter [Accounts Receivable Contact Details email] in username and enter your password. Click on Login • Click on View My Open Tasks link • Click on each task, review the change and either click on Accept Change or Reject Change The change will take effect immediately when all approvals have been submitted. Should you reject the request the change will not occur. Please contact [entity purchasing team email] if you have any concerns.
Note	When all modifications are approved the change will take place within a fifteen-minute window Then an email will be sent to the Primary contact confirming the bank accounts have been updated.	

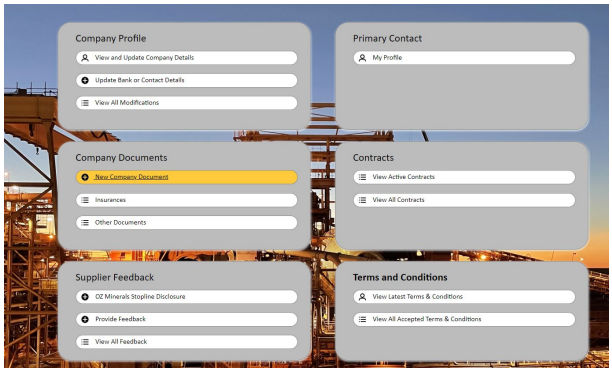
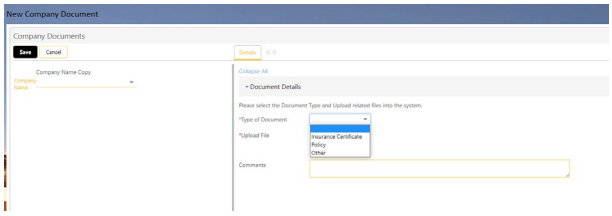
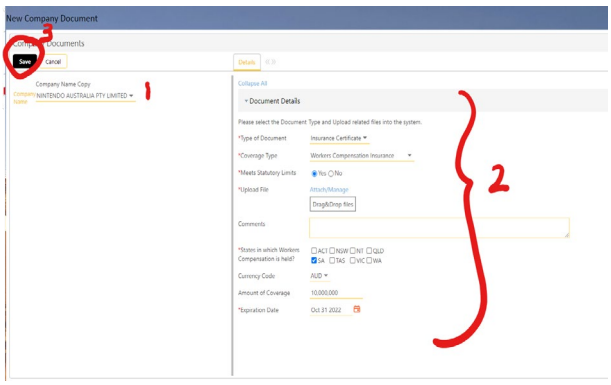
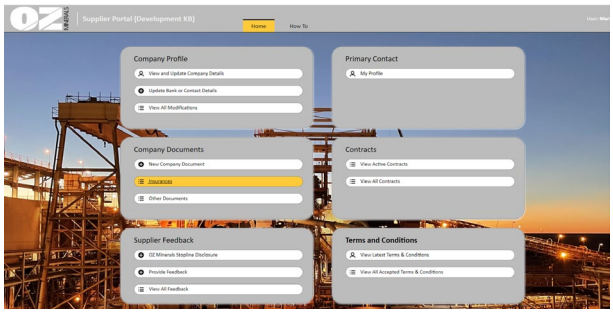
Update Goods and Services

If you need to update Good and or Services, you provide please follow the steps below.

Step	Details	
1.	Click **View and Update Company Details** button	
2.	Click the yellow "**Modify Supplier Profile**" button • Navigate tot the "**Goods & Services**" tab • Update any goods & services that your company provides and deselect any that are not relevant • If none of the "tick boxes" apply, please enter in the free text field at the bottom of the page	
3.	Click on **Submit Modification Request** button to submit the change Updates are completed automatically, and **Status** will be "**Approved**" Submit Modification Request	

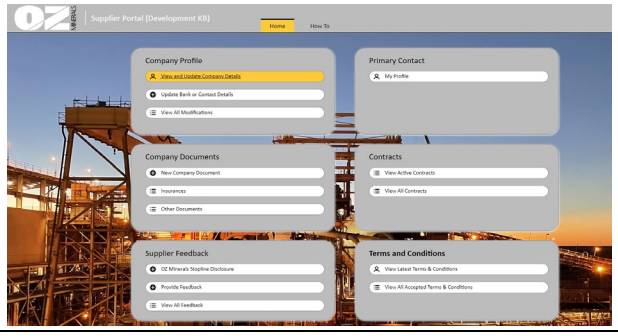
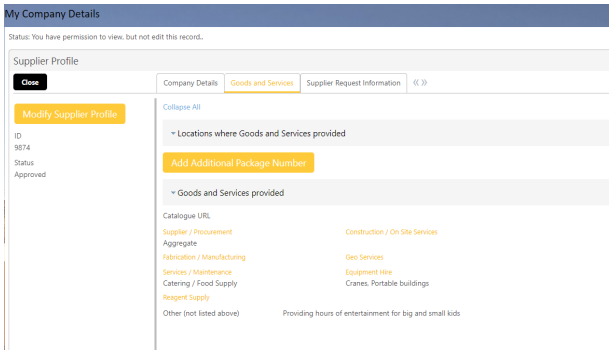
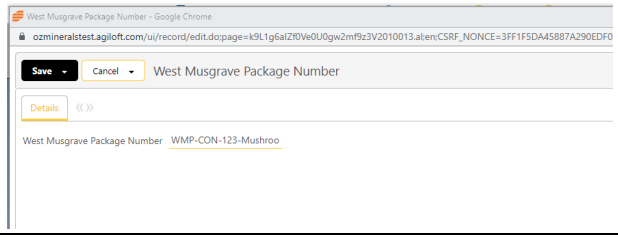
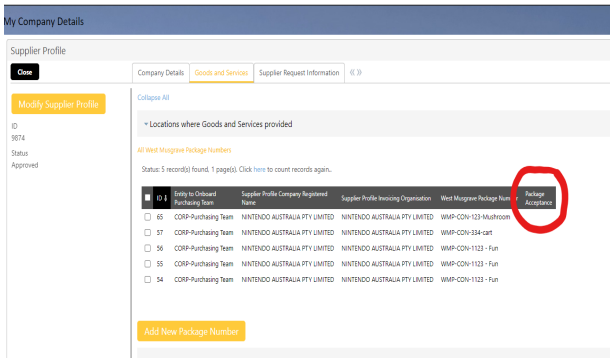
Attach Insurances and Other Documents

Insurance premiums need to be updated when they have expired, follow the steps below to attach latest insurance documents.

Step	Details	
1.	To upload additional Insurances or Other Documentation, click into "+New Company Document"	
2.	• Choose "**Type of Document**" from the drop down menu	
3.	• Choose the "**Company Name**" that you wish to upload this document for (in the left hand pane) • Proceed to **complete the relevant fields** required • **Attach** your document • Click '**Save**"	
4.	All your uploaded documents should appear in under "**Insurances**" or "**Other Documents**" depending on the type you chose	

Record West Musgrave Package Number

When applying for West Musgrave tender please ensure you apply the steps below so that the package number is captured.

Step	Details	
1	To **add a West Musgrave Package Number** (from the ICN website of available packages). Click **View and Update Company Details** button	
2	Navigate to the "**Goods & Services**" tab	
3	• Click on the "**Add Additional Package Number**" and enter the information in the field provided • Click "**Save**"	
4	Package Numbers will display in a table format. • You can add as many package numbers as you would like to apply for • You can also view the status of your application in the "**Package Acceptance**" column