



Cleveland Clinic

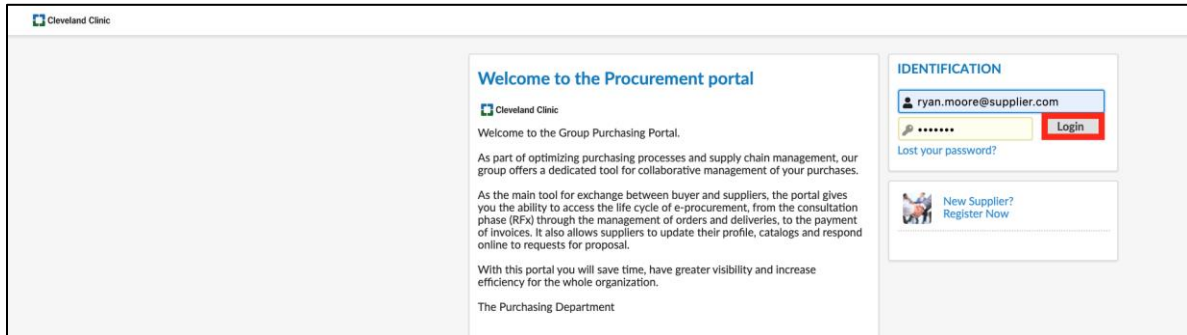
Updating Ivalua Supplier Portal Profile (contacts and documents)

User Guide

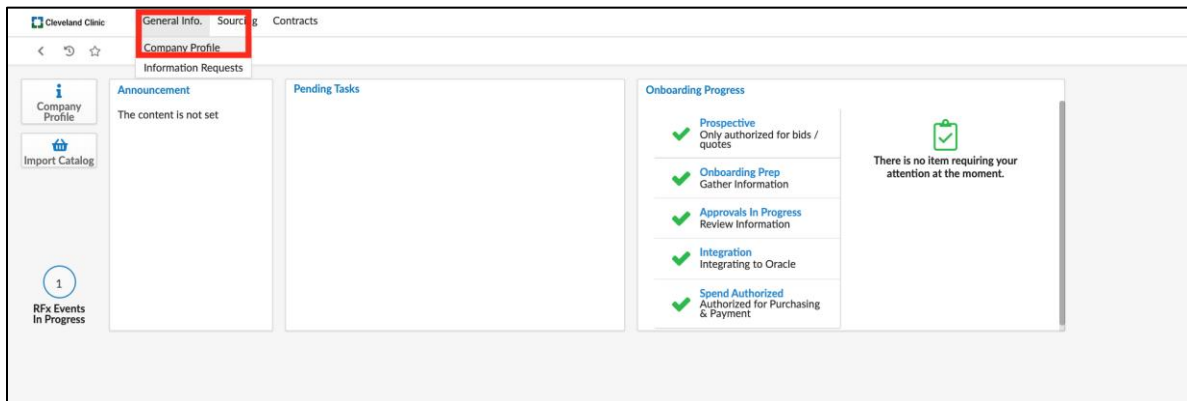
[GLOBAL BUSINESS TRANSFORMATION](#)

Purpose: The purpose of this document is to provide Suppliers with a quick guide on how to add/update contacts and documents.

1. Login to the Ivalua Portal

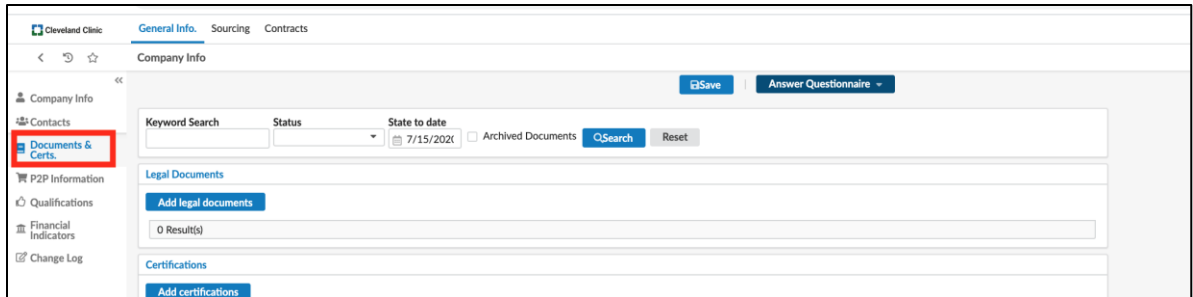


2. Navigate to the **General Info** Tab and select **Company Profile** from the drop down.

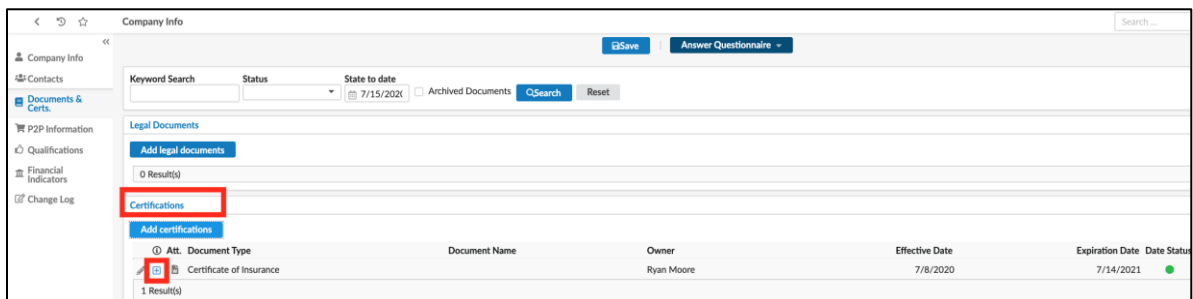


Updating Documents

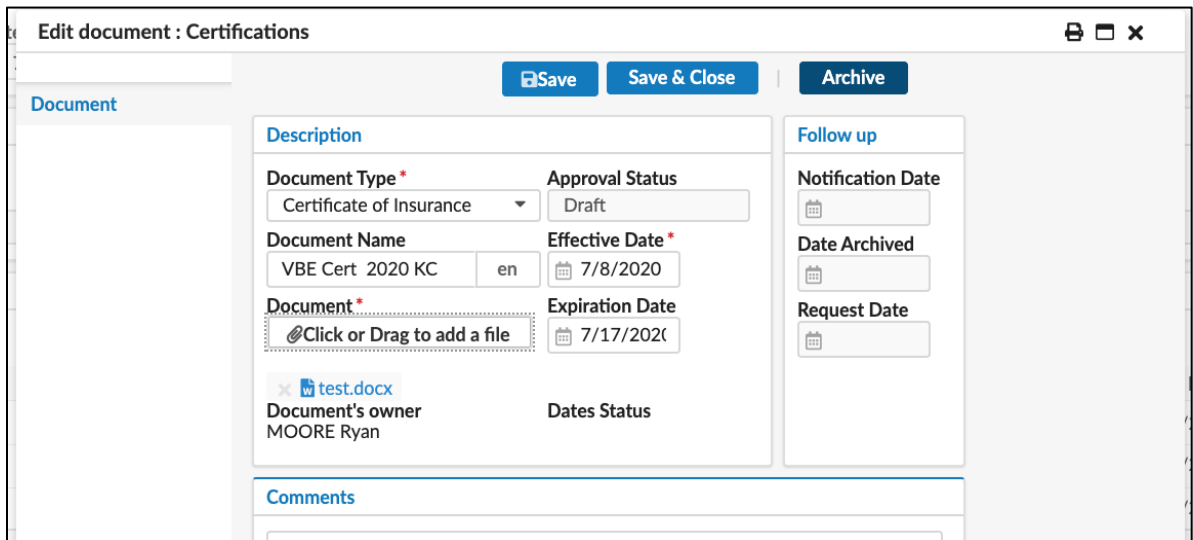
- Once on the Company info page, navigate to the Documents & Certs. page from the navigation bar.



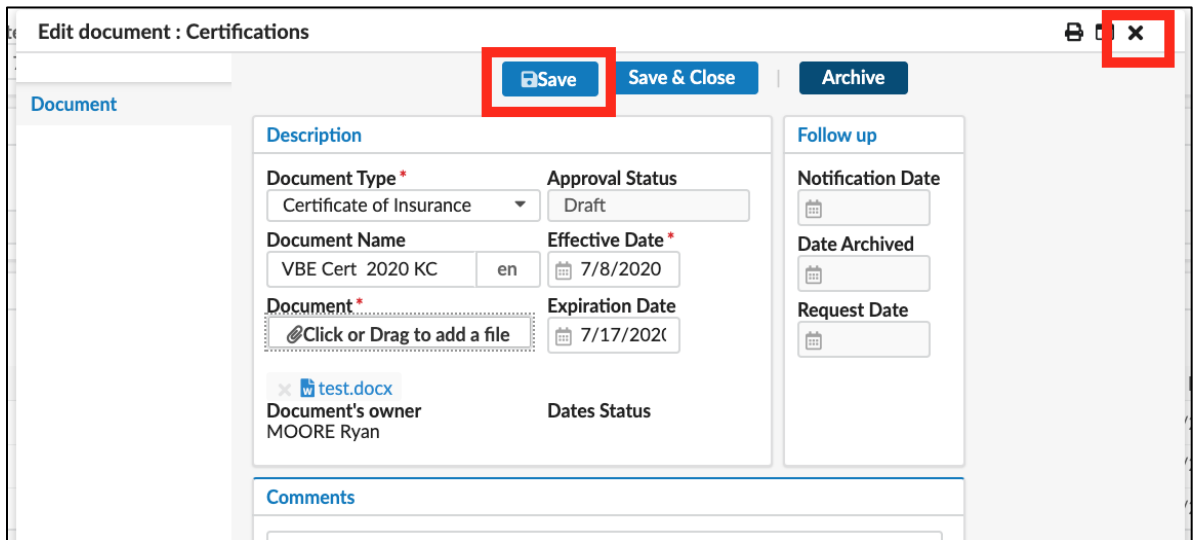
- Under the Certifications section, find the document that needs to be updated and click the edit + button to the left of the document.



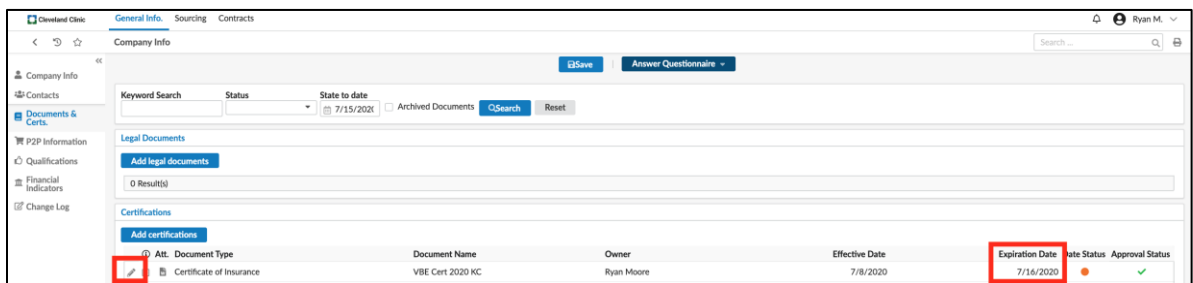
- In the Edit Document pop-up page, update the Document details.



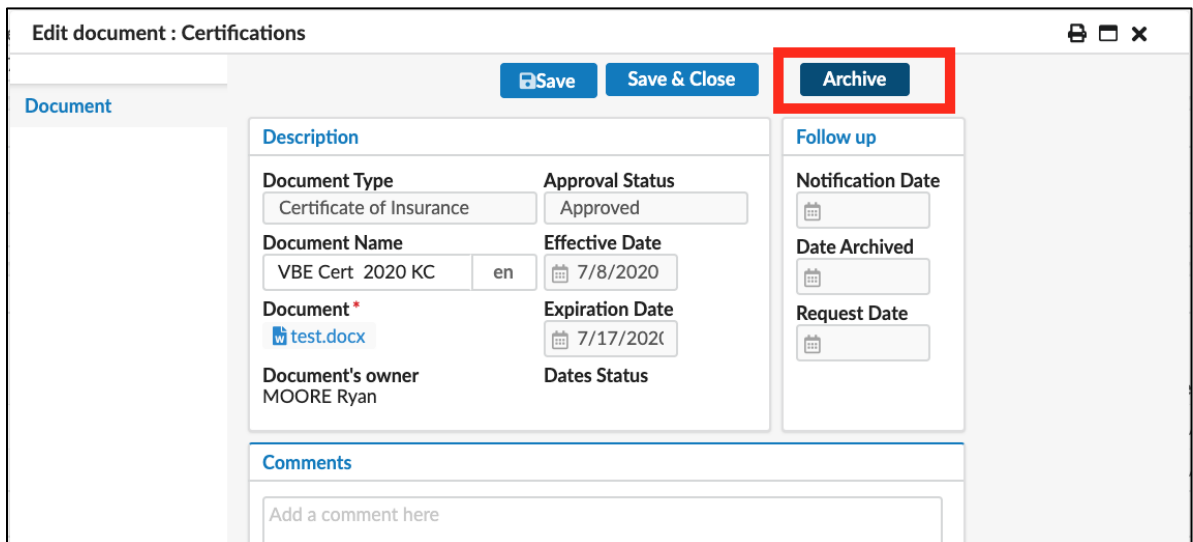
6. Click Save. Click the X to close the pop-up page.

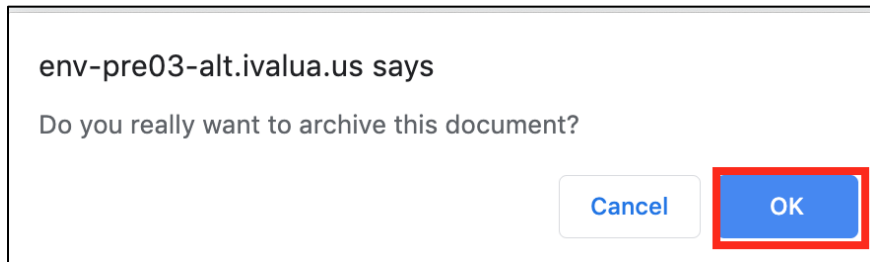


7. Click on the edit pencil next to the expiring document.

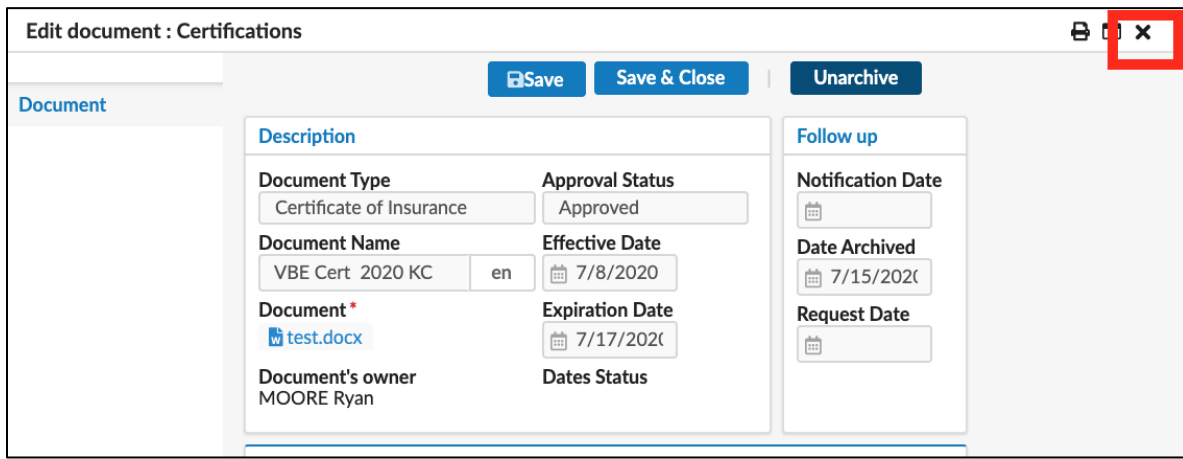


8. Click the "Archive" button; then click "OK" to confirm.



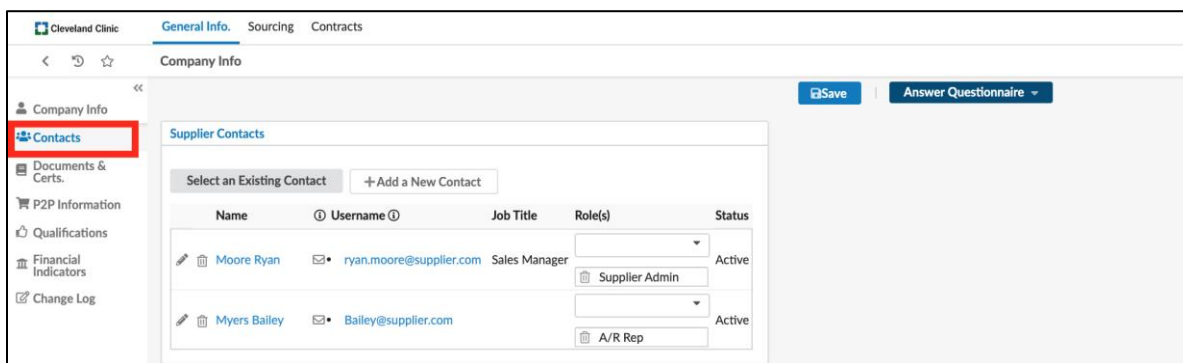


9. Click the X to close the pop-up page.

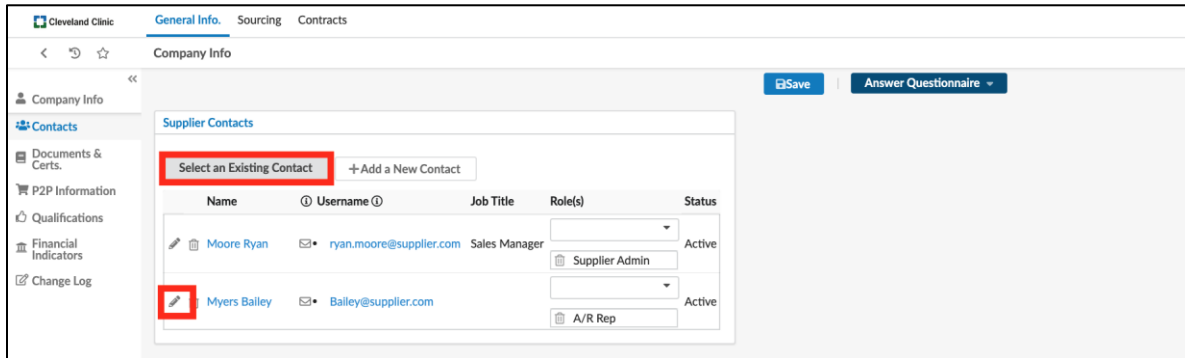


Updating Contacts Information

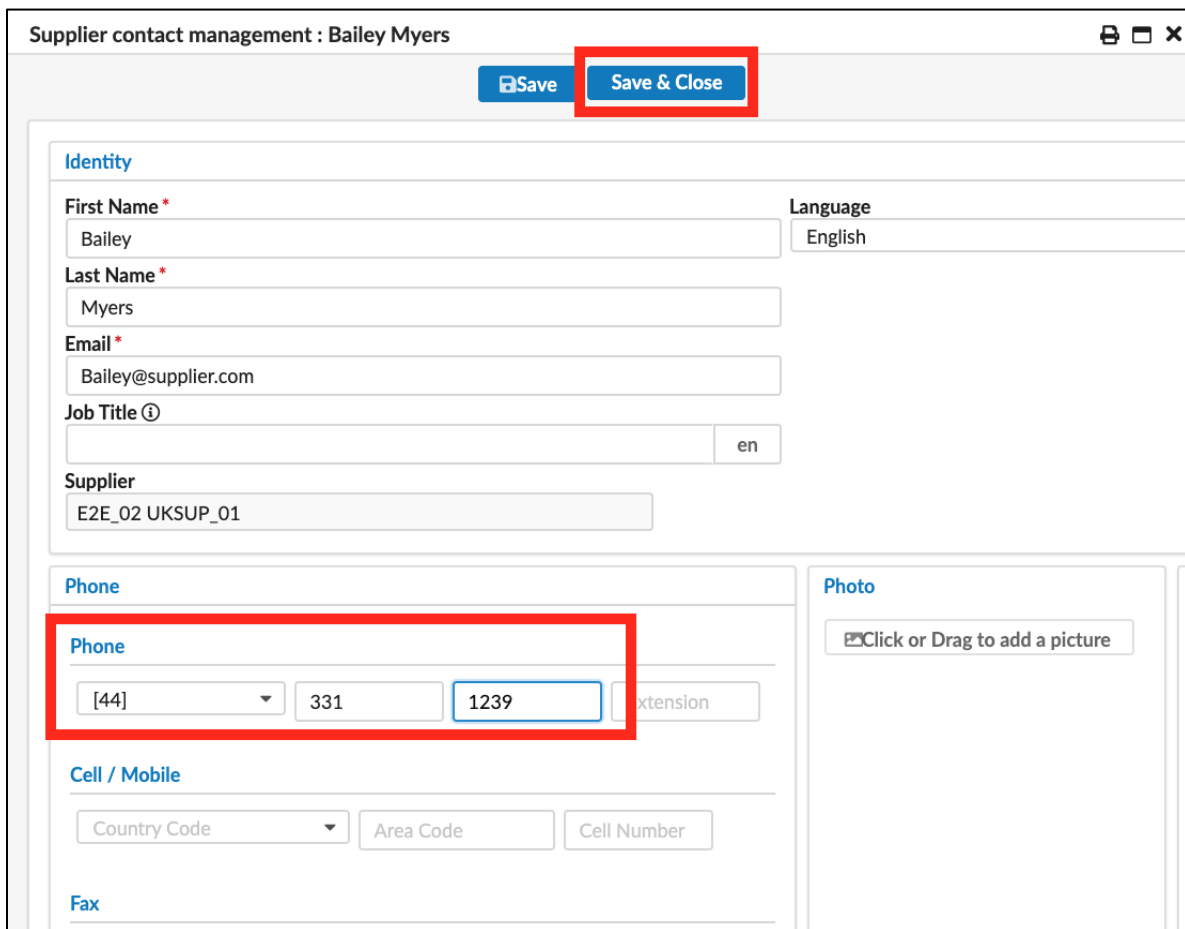
10. Navigate to the **contacts** page from the navigation bar.



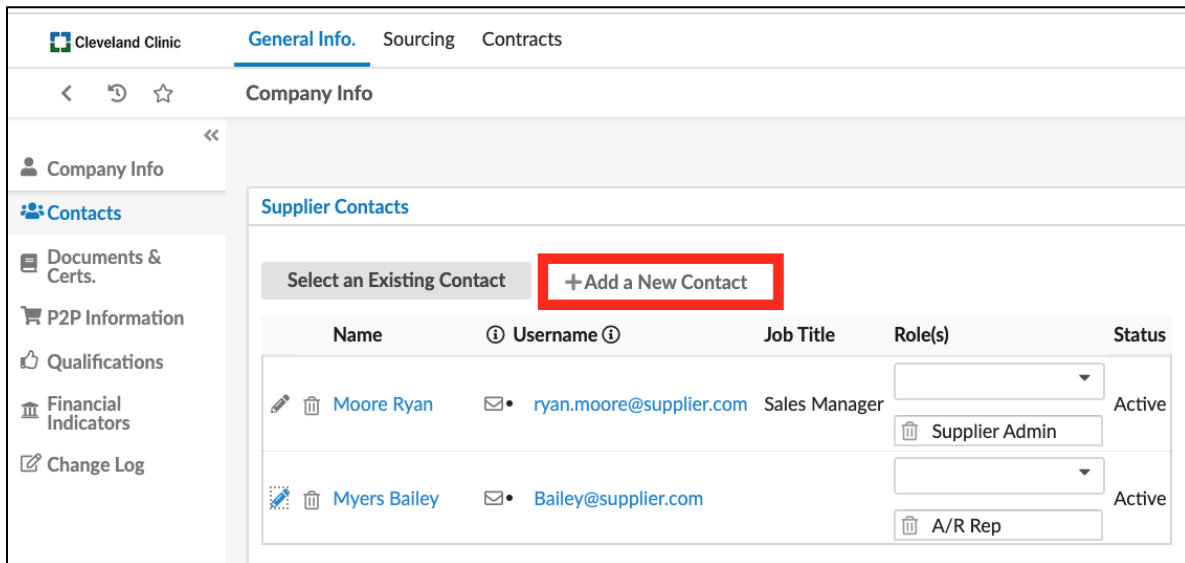
- Under the Supplier Contacts section, find the contact that needs to be updated and click the edit pencil button to the left of their name.



- Under the phone section, input a new cell phone number. Click **Save & Close** at the top of the Supplier contact management page.



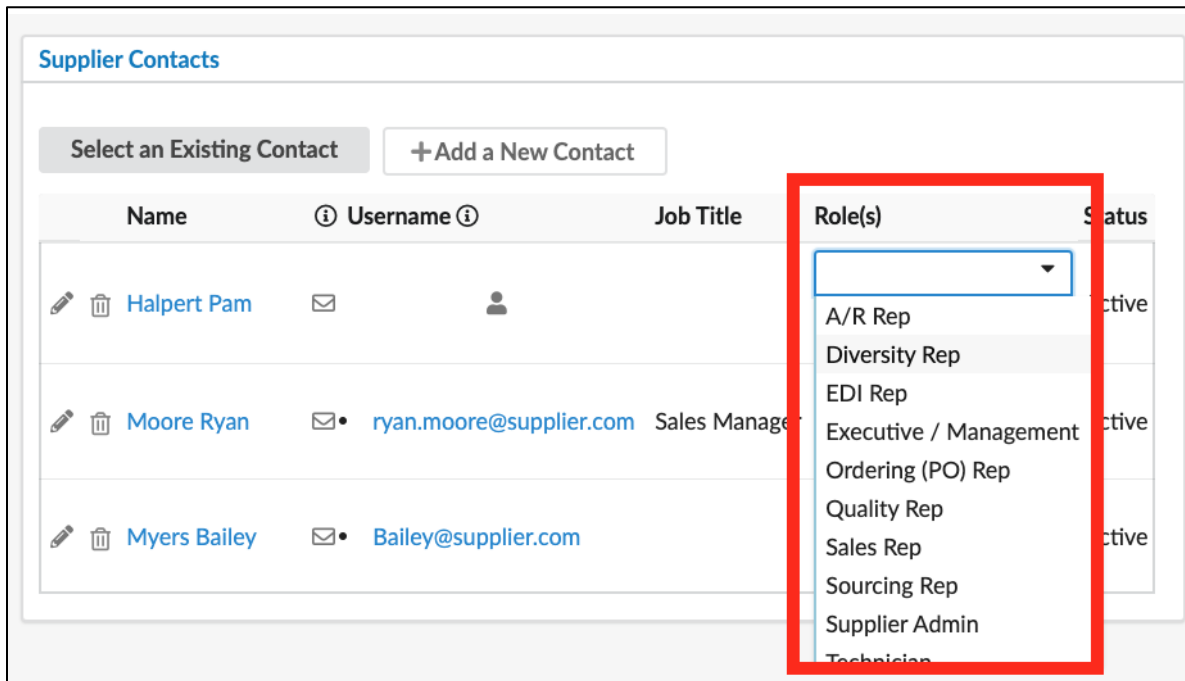
- Click on the **+ Add a New Contact** button under the Supplier Contacts section of the Contacts page.



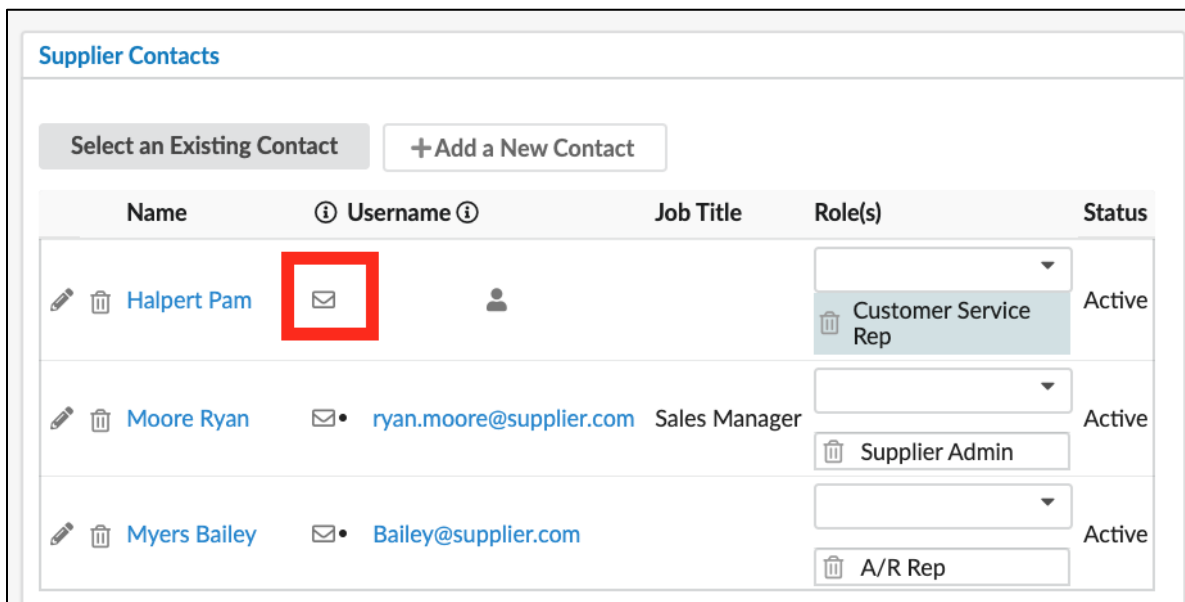
- Enter in the contact's **first name, last name, email** and click **Save and Close** at the top of the window.



- In the **Role** field next to the contract you added, click on the drop down and select the contact role.



- Click on the **envelope** icon under the Login Invitation column of the contact you just added.



- Ensure the **profile code** of Supplier is selected, click **Send Invitation** at the top of the window and click the "X" at the right corner to close the screen.

Invite a supplier contact to login

Send invitation

Invite a contact

First Name
Pam Halpert

Email
Pam@office.com

Profile code*
 Supplier ⓘ

Subject
Access to Ivalua Buyer

Notification body
 Dear Pam Halpert,
 You have just been assigned an access to the application Ivalua Buyer for supplier E2E_02 UKSUP_01.
 You are invited to follow this link : [Click here](#)
 Your user ID: {login}
 Your password: {password}

Invite a supplier contact to login

The invitation to register has been sent to the contact

Invite a contact

- Click **Save** at the top of the page before navigating away to any other page.

Cleveland Clinic | General Info | Sourcing | Contracts

Company Info

Supplier Contacts

Select an Existing Contact | + Add a New Contact

Name	Username	Job Title	Role(s)	Status
Halpert Pam	Pam@office.com		Customer Service Rep	Active
Moore Ryan	ryan.moore@supplier.com	Sales Manager	Supplier Admin	Active
Myers Bailey	Bailey@supplier.com		A/R Rep	Active

Save | Answer Questionnaire

19. Navigate to the upper right-hand corner of the webpage, and click on the downward arrow next to the user name. The drop down will open and click **Logout**.

